

Zoom Guide for Directors and Teachers

Scheduling and Managing a Recurring Meeting

In order to set up a recurring meeting on Zoom, you must first log in to your account at zoom.us. You can create and manage meetings from the Zoom app or desktop version, but it is much easier at zoom.us.

Scheduling the Meeting

1. Click the blue “schedule a new meeting” button
2. Enter a title for your meeting (and a description if desired)
3. Set the date and time of the first session
4. Set the duration of the meeting and double-check the time zone
 - a. The duration of the meeting just blocks out that time on the Zoom account so that no other meetings can be scheduled - your meeting will not end automatically at the scheduled time
5. Check the “recurring meeting” box
 - a. Choose whether you want your meeting to occur weekly, monthly, etc. You can also choose to schedule the meeting on multiple days of the week under the same Zoom link (although they would all occur at the same set time; you can't do Wednesdays at 4:00 and Sundays at 9:00)
 - b. Choose either the number of occurrences or the end date. Keep in mind that, for now, Zoom will schedule a meeting every indicated week during the time frame. More on this later.
6. If you plan to have participants register for the meeting, check the registration button (see below for further information).
7. Make sure that both the waiting room and passcode are enabled. You can change the passcode to something easier to remember.
8. Set your Meeting Options
 - a. Only check “join before host” if it is a teacher's job to open the meetings, but understand that only the account holder can be the host.
 - b. Enable breakout rooms if you plan to use them (see below for more instructions on how to pre-assign participants to breakout rooms)
 - c. Mute participants upon entry if desired (you can also toggle this on and off in the meeting itself)
 - d. Enable polls if you plan to use them in any of your meetings (although you can always come back and enable them later).
 - e. Do NOT set the meetings to automatically record unless you have written permission from all students' parents.
9. Click save to save your meeting.
10. Optional: On the meeting screen, click “show all occurrences (near the date and time of the meeting) to delete sessions you will not hold class, like vacations and holidays. Do this before you share the link with parents, as Zoom gives the option to add all of the meetings to a calendar (iCal, Outlook, Yahoo, Google, etc).

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11. Share the invitation (or registration link) with parents via email. Include instructions on how to add the sessions directly to their calendars by clicking the appropriate link. This should cut down on emails, texts, and calls asking for the Zoom link every week.

Setting Up Registration

You can set up registration while setting up a new meeting or by going back to edit a meeting. You can also turn registration on or off at any time.

1. Check the box to require registration for the meeting. This generates a registration link that you will share with parents.
 - a. It is very important to ask parents to register each learner under the learner's name (not the parent's) with a unique email address. Remind parents that registering for the sessions generates a unique URL specific to that learner, and they should not share URLs with siblings or other families.
2. After setting up the recurring meeting, scroll down to adjust the registration requirements
 - a. Indicate whether all registrants are approved automatically or whether you want to approve them manually
 - b. Indicate if you would like Zoom to send an email every time someone registers
 - c. Set registration questions if desired (the default is first and last name and email, but you can also add other questions including custom questions like grade levels, parents' names, etc).
3. When participants register, you can check who has registered by clicking "view" next to "manage attendees." In this window you can also resend the confirmation email to registrants whenever you like (which can also help prevent calls, emails, and texts asking for the Zoom link) or remove participants from the registration list.

Pre-Assigning Breakout Rooms

This feature only works when registration is enabled. You can use breakout rooms in any meeting but you can only pre-assign them when participants are registered.

1. In your initial meeting setup or when editing a meeting, check the appropriate box to enable breakout rooms
2. You will see two options - "create rooms" and "import from CSV."
 - a. You can download a spreadsheet template, fill it with the applicable information, and then upload it to create and populate your breakout rooms all at once, but you would need to know which email each participant is using for the Zoom meeting for this to work.
 - b. To do this manually, click "create rooms."
 - i. Click the plus sign to create a room, then rename the room by clicking on the generic name (i.e., "breakout room 1").
 - ii. Enter the e-mail addresses of participants to assign them to rooms. If you need to move a participant to another room or remove a participant

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entirely, just hover your cursor over the participant's email address for those options.

- iii. Click SAVE when you are finished.
3. Note that in order for participants to be automatically sorted into their breakout rooms, they need to log in at zoom.us before entering the meeting. Also, you can add or move participants manually during a meeting.

Safety and Management

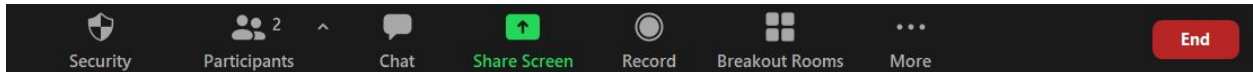
Preset Safety and Management

Before starting a meeting, you can adjust several settings in your Zoom account to establish safety and management protocols in every meeting you host.

1. Log into your Zoom account and click "settings" in the left hand navigation menu.
2. Schedule Meeting options:
 - a. Make sure the waiting room and passcode are enabled. You can customize your waiting room by adding a message or logo if desired. This might include instructions that ask a student to make sure they are logging in under their own name and with their video on.
 - b. Toggle the requirement for participants to start with video on if required
 - c. Do not enable "join before host" unless you know a teacher will log on early.
 - d. Toggle "mute participants upon entry" if desired - this can be very helpful with kids. You can also enable/disable this from your meeting as it runs.
3. In Meeting options:
 - a. Enable or disable chat as desired (you can also toggle this on and off in the meeting)
 - b. Disable file transfer
 - c. Enable co-hosts
 - d. Enable polling
 - e. Set screen-sharing to host only (you can temporarily set a student as a co-host if they need to share a screen for an activity or assignment).
 - f. Set annotation to be used only by the person screen sharing (this will prevent students from drawing all over your slides)
 - g. Disable remote control
 - h. Enable reactions
 - i. Enable or disable renaming permission as desired (you can also toggle this on and off in the meeting, and you as host will always be able to change participants' names).
 - j. Enable breakout rooms and virtual backgrounds if desired.

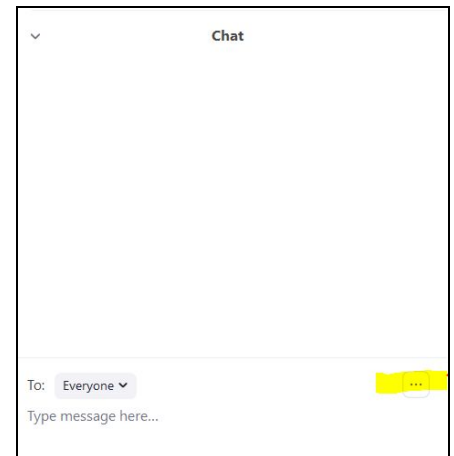
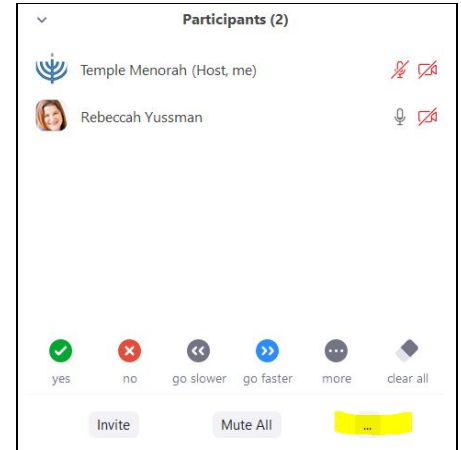
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Safety and Management Protocols In Meeting



After starting your meeting, you can enable or disable several security and management settings.

1. In the security menu, you can:
 - a. Lock a meeting (prevents anyone else from logging on)
 - b. Disable and re-enable the waiting room (I do not recommend disabling the waiting room, except perhaps for staff meetings and the like)
 - c. Toggle participants' ability to share screen, chat, rename themselves, and unmute themselves (an example - I do not allow participants to unmute themselves in most large meetings, like religious school and services, until things are well underway and I can pay attention to the participants. This prevents intentional disruptions as well as general chaos).
2. In the participants window, you can click the Mute All to instantly mute all participants (including the host and co-hosts).
 - a. You can also click the three dots for many of the same options as in the security menu - mute participants upon entry (recommended), allow participants to unmute and rename themselves, play a sound when someone joins or leaves (not recommended for big groups), enable/disable the waiting room, and lock meeting.
3. In the chat window, you can click the three dots to customize the participants' chat capabilities. You can turn off chat entirely, make it so the participants can only chat with the host, or make it so that the participants cannot private chat to each other. You can change the settings whenever you wish (for example, I always turn off private chat to avoid bullying and distractions, but will turn off chat entirely during Tefilah or when students are misusing it).
4. You can also hover over a participant's name (or the three dots that appear when you hover your cursor over the top right corner of the participant's video) to ask them to start video, rename them, make them a co-host, mute and unmute, or to stop their video, put them back in the waiting room, or remove them from the meeting. This would be particularly helpful with "Zoom bombing" or if a student refuses to comply with rules. Note that a participant who is removed from a Zoom meeting cannot rejoin.



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Opening and Managing Breakout Rooms

Only the Host of the meeting can create, populate, open, and close breakout rooms. The Host can also transfer participants between rooms as well as move between rooms him- or herself.

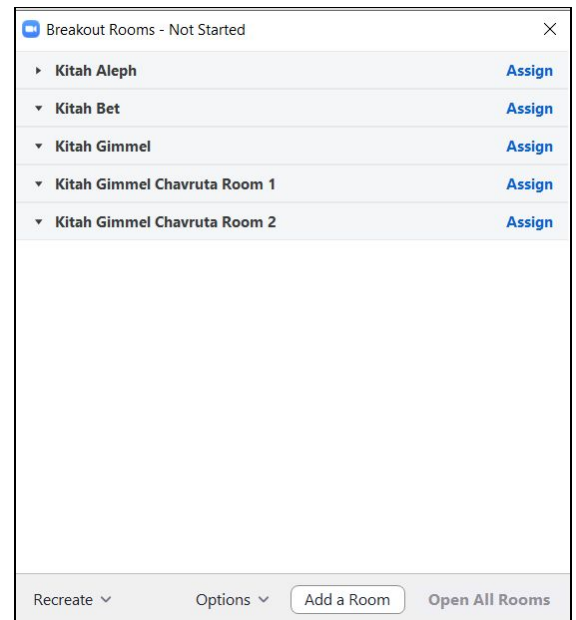
Automatic Breakout Rooms

If you want to arrange breakout rooms so that participants are divided up randomly, just click the Breakout Rooms button, choose how many breakout rooms you want, verify that it is set to “Automatically,” and then click Create Rooms.

Manual Breakout Rooms

If you have set up your meeting with breakout rooms pre-assigned, you should check to make sure that all participants are sorted correctly before opening the breakout rooms. If you have not created breakout rooms and assigned participants beforehand, you will need to do this in-meeting.

1. Click the Breakout Rooms button. Indicate how many rooms you plan to create (you can add more later) and switch the selection to “Manually.” Then click Create Rooms.
2. Zoom will start with default breakout rooms. To rename them, simply hover over the breakout room and a menu will pop up. Click “rename.”
3. If you need to create more rooms, click “add a room” at the bottom.
4. To assign participants to breakout rooms, simply click “Assign” next to each room and choose which participant(s) you want to assign to that room.
 - a. To move a participant to another breakout room, hover over the participant’s name and select “move to” and then the new destination, or click “exchange” to swap the participant with another.
 - b. You can sort participants who are still in the waiting room, but this can be problematic if you open the breakout rooms while the participants are still in the waiting room if you do not have the meeting set to send participants to breakout rooms automatically.
 - c. If a participant accidentally misses the invitation to join a breakout room, you can reissue it by moving them to a different breakout room (tell them to ignore the first message) and then back to the intended breakout room.
5. To open the Breakout Rooms, click Open All Rooms. You cannot open just select rooms, but if a room has no participants added to it, no one can enter it until you assign a participant to it. This can be helpful for virtual tutoring rooms or chavruta rooms.
6. If you want to delete all of your rooms and start over, click Recreate in the Breakout Rooms menu.



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Breakout Room Options

There are several options for breakout rooms that should be set before the rooms are opened. Click Options in the Breakout Rooms menu to adjust them.

1. Move All Participants Automatically - keep this checked to send participants directly to their breakout rooms when they are opened. Uncheck to give participants a choice about joining or staying in the main room.
2. Allow Participants to Return to Main Session - keep this checked if you want participants to be able to return to the main room at any time; uncheck it if you want them to stay in their breakout rooms with no options to return.
3. Automatic Closure - check this if you want breakout rooms to close after a specific amount of time. If checked, breakout rooms will close automatically and send participants back to the main room.
 - a. Notify Me When Time Is Up - this option is only available if you have opted to close the breakout rooms automatically.
4. Countdown - this will automatically alert participants when the breakout rooms are about to close. You can customize the amount of time.

Managing Open Breakout Rooms

1. When breakout rooms are open, you can still add participants or move participants between rooms as described above
2. The Host can also move between the main room and breakout rooms. Just click Join next to the breakout room you wish to join in the Breakout Rooms menu.
3. Participants in Breakout Rooms have the option to ask for help by clicking the appropriate button. This will send the Host a message.
4. You can send a message to all breakout rooms by clicking "broadcast a message to all" in the Breakout Rooms menu. This is helpful in warning participants when a session is near the end.
5. To close breakout rooms, just click Close All Rooms.