

Host and Participate in a Zoom Meeting

CMU has a Pro Zoom account. Zoom offers **voice and video conferencing**. It is often used for **meetings** and **webinars**. It may be used for **virtual office hours, tutoring,** and **group projects**. When appropriate, it may also be used for **live class sessions**. Features include document and desktop sharing. Recordings of meetings are available as cloud recordings or downloadable MP4 files.

This guide will walk you through the steps to **host** a meeting and **participate** in a meeting. Guidance is also provided for captioning and teaching resources.

Contents

Host and Participate in a Zoom Meeting	1
Contents	1
Host a Zoom Meeting.....	2
Host Tutorial Videos.....	2
Zoom Settings	3
Scheduling a Zoom Meeting.....	4
Starting and Recording a Zoom Meeting	8
Sharing a Recorded Meeting	15
Participate in a Zoom Meeting.....	18
Participant Tutorial Videos from Zoom.....	18
Joining a Zoom Meeting	18
Using the Zoom Meeting Toolbar	20
Captioning a Zoom Meeting & Other Accessibility Considerations.....	22
Resources	22

Host a Zoom Meeting

You will need to **create** an account if you plan to **host** a meeting. Check out our [Zoom Account Set Up guide](#). If you only need to **participate** in a meeting, you do not need to create an account. If you just need to participate, you may skip to the steps outlined in the [Participate in a Zoom Meeting](#) section of this guide.

Notes:

- Check out [Zoom System Requirements](#).
- If you need to use [keyboard shortcuts](#), they are available.
- If you can't use the desktop version or just prefer the app experience, there is a [Zoom mobile app](#) available.
- If you are using a **Chromebook**, please refer to [How to Use Zoom on a Chromebook](#). Cloud recording may not be available on a Chromebook. While you can still host a Zoom session on this device, you may have to [set another user as a co-host](#) or [allow others to record](#). You should be able to join Breakout Rooms from a Chromebook but not on the web client. You will be able to join but not manage from the mobile app.
- If you are unable to install Zoom on any device, you may join a meeting via a web browser. The [Zoom web client](#) offers limited functionality. Use the Chrome, Firefox, or Edge web browser for the best functionality.
- Zoom enforces minimum versions, so please check for updates frequently.

As the host, you may access Zoom via:

- MAVzone > Applications > Zoom
- Zoom desktop application (once installed)
- Zoom mobile app (check out [Zoom's mobile app guide](#))
- D2L > Content > (Module) > Existing Activities > External Learning Tools > Zoom (option only available for faculty)

Use this part of the guide to **schedule** and **host** a Zoom meeting. The screenshots are based on the Zoom **desktop application**. If you wish to use the D2L Zoom integration, please refer to the [Host and Participate in a Zoom Meeting with D2L guide](#).

Host Tutorial Videos

From Zoom:

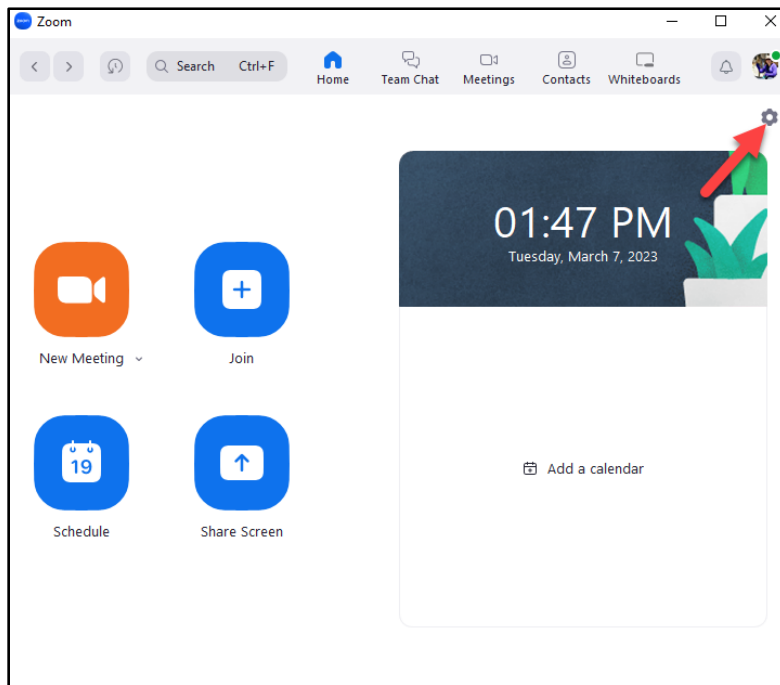
- [Scheduling a Meeting from the Web or Desktop](#)
- [Recording a Zoom Meeting](#)
- [In Meeting Navigation](#)
- [Share Your Screen, Video, or Audio](#)

From CMU:

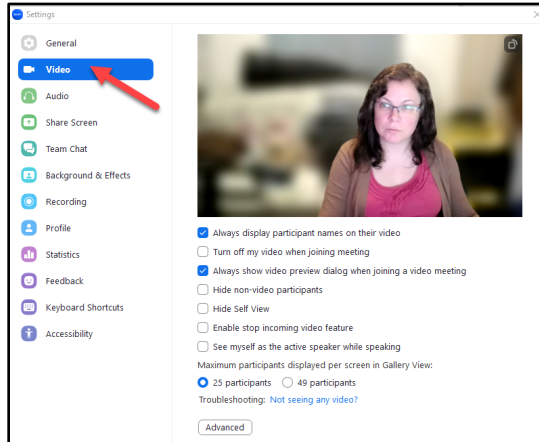
[Recording Group Presentation with Zoom](#) (Note: This video does not mention the required password/waiting room when setting up a meeting.)

Zoom Settings

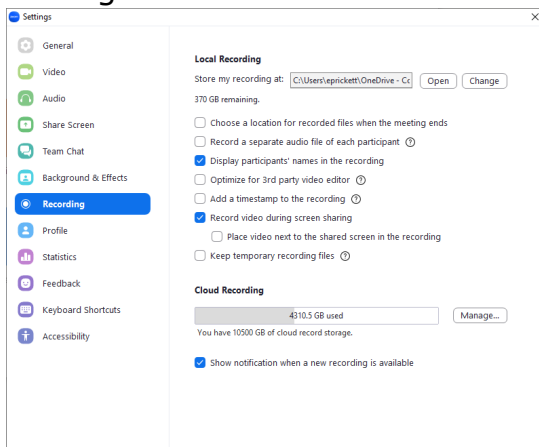
1. Once you have a Zoom account and have the desktop application (program) installed, launch Zoom from your computer. (Note: If you cannot find the program on your computer, you can download it again from https://zoom.us/download#client_4meeting.)
2. After launching Zoom, click on the **Settings** (gear icon) menu on the top right of the launch window.



3. Check out **Video** settings, including **Advanced**. Explore the settings for General, Audio, Share Screen, Background and Effects, Profile, etc.

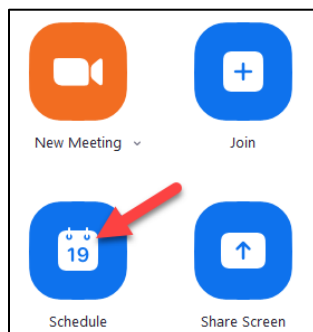


4. You can also go to the **Recording** settings and choose a preferred **Local Recording** location (such as Desktop) to save recordings. Recordings are also available in **Cloud Recording**. Cloud recordings have more options, such as automatic captioning. Close the window when you are finished adjusting the settings.

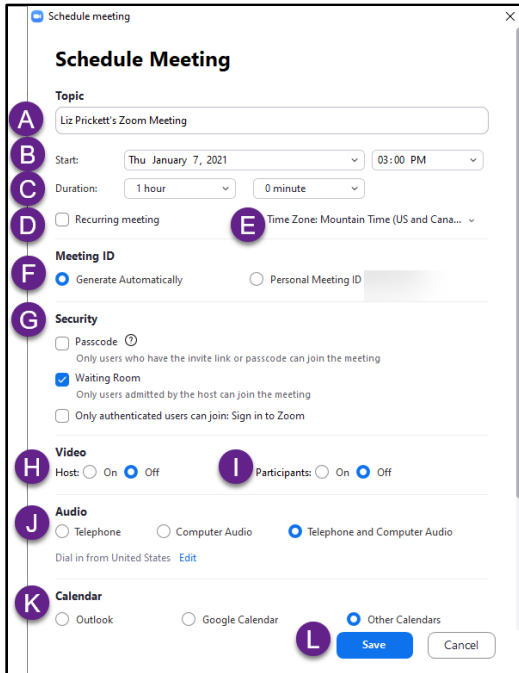


Scheduling a Zoom Meeting

1. From the main menu, select **Schedule**.



2. In the **Schedule meeting** dialog:



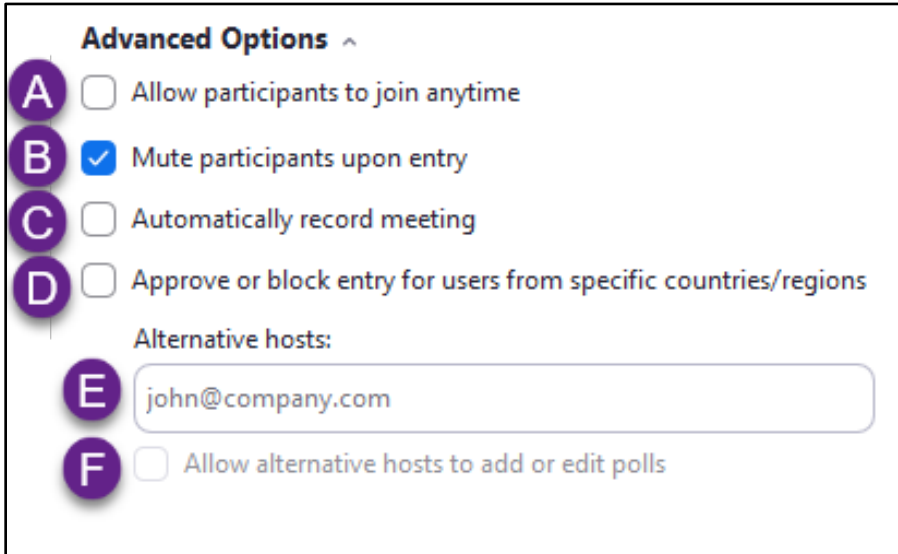
The screenshot shows the 'Schedule Meeting' dialog box in Zoom. It contains the following sections and options:

- Topic:** A text field containing 'Liz Prickett's Zoom Meeting' (labeled A).
- Start:** Date and time pickers set to 'Thu January 7, 2021' and '03:00 PM' (labeled B).
- Duration:** Pickers for '1 hour' and '0 minute' (labeled C).
- Recurring meeting:** An unchecked checkbox (labeled D).
- Time Zone:** A dropdown menu showing 'Mountain Time (US and Cana...)' (labeled E).
- Meeting ID:** Radio buttons for 'Generate Automatically' (selected, labeled F) and 'Personal Meeting ID' (labeled G).
- Security:** Three options: 'Passcode' (unchecked, labeled H), 'Waiting Room' (checked, labeled I), and 'Only authenticated users can join: Sign in to Zoom' (unchecked, labeled J).
- Video:** Radio buttons for 'Host' (labeled K) and 'Participants' (labeled L), each with 'On' and 'Off' options.
- Audio:** Radio buttons for 'Telephone', 'Computer Audio', and 'Telephone and Computer Audio' (selected, labeled M).
- Calendar:** Radio buttons for 'Outlook', 'Google Calendar', and 'Other Calendars' (selected, labeled N).
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right (labeled O).

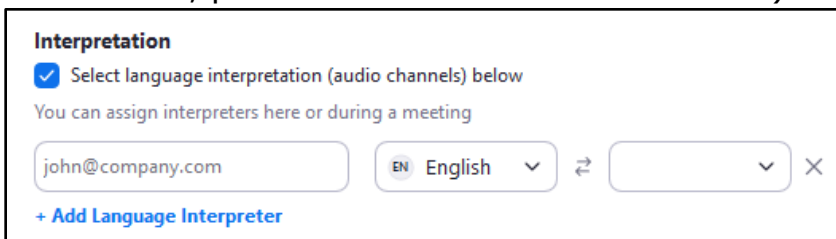
- a. **Topic:** Name your meeting.
- b. **Start:** Add your meeting **date** and **time**.
- c. **Duration:** Enter your estimated meeting length.
- d. **Recurring meeting:** Check this box to schedule recurring meetings. (Note: Zoom limits users to 50 recurring meetings for one scheduling set up. If you need additional meetings, you will need to set up an additional recurring meeting.)
- e. **Time Zone:** Double check you are in the correct time zone.
- f. **Meeting ID:** Select from **Generate Automatically** or use your **Personal Meeting ID**.
- g. **Security:** Check if you wish to include a **Passcode** or **Waiting Room** (recommended). You also have the option for **Only authenticated users can join:** Sign in to Zoom
- h. **Video – Host:** Choose if you would like your video on or off when joining the meeting. Even if you choose off, you will have the option to start your video after joining the meeting.
- i. **Video – Participants:** Choose if you would like the participants' video on or off when joining the meeting. Even if you choose off, participants will have the option to start their videos after joining the meeting.
- j. **Audio:** Select **Telephone**, **Computer Audio**, or **Telephone and Computer Audio**
- k. **Calendar:** Select **Outlook**.
- l. Click the **Save** button once you've made your selections.

Notes:

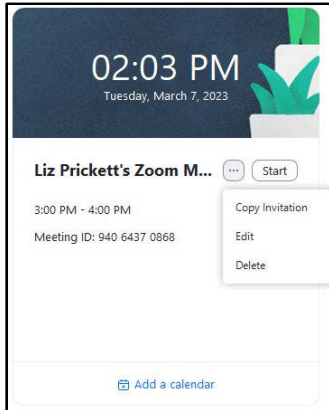
- Expanding the **Advanced Options** allows you to select additional options:



- A. **Allow participants to join anytime:** Typically leave this option unchecked so that you are the first in the meeting.
 - B. **Mute participants on entry:** This is a good option to check, especially for meetings with multiple participants.
 - C. **Automatically record meeting:** This may be a good option to check if you're hosting a class session(s) and need to share the recording with the class or need to caption the meeting afterward.
 - D. **Approve or block entry for users from specific countries/regions:** This may not be applicable.
 - E. **Alternative hosts:** Enter email if applicable. You may enter the email address of another Zoom user with a Pro license on our CMU account to allow them to start the meeting in your absence.
 - F. **Allow alternative hosts to add or edit polls:** Check out our [Advanced Polling and Quizzing](#) guide that shows you how to add and launch polls and quizzes during meetings and view/download results.
- **Interpretation:** If your meeting will have an interpreter, checkmark **Select language interpretation (audio channels) below**. (For more information, please contact Distance Education.)



3. The meeting details will appear. Depending on how you need to share the details with meeting participants, you may copy the entire instructions or just copy the meeting topic, time, and link and paste the details for your participants in an email, D2L, etc. You'll be prompted to add the meeting to your Outlook calendar.



Notes:

- If you don't already have it set up, you may add the meeting to your Outlook Calendar as well with the [Microsoft Outlook desktop plugin](#).
- If you need to copy the meeting invitation again, you may do so by clicking on the **3-dot menu** by the scheduled meeting and selecting the **Copy Invitation** option from the dropdown menu.

When sharing your meeting link, it may be helpful to include some quick tutorial links for your participants, such as:

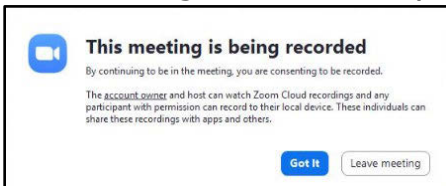
Before Joining:

- [Watch this quick tutorial on how to join a meeting](#)
- [Watch this quick tutorial on joining and configuring audio and video](#)
- [Watch this quick tutorial in-meeting navigation](#)
- [Test Joining a Zoom Meeting](#)

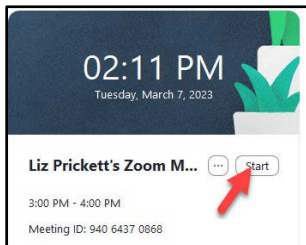
Starting and Recording a Zoom Meeting

On the scheduled day and time, the host will start the Zoom meeting from the Zoom application main menu.

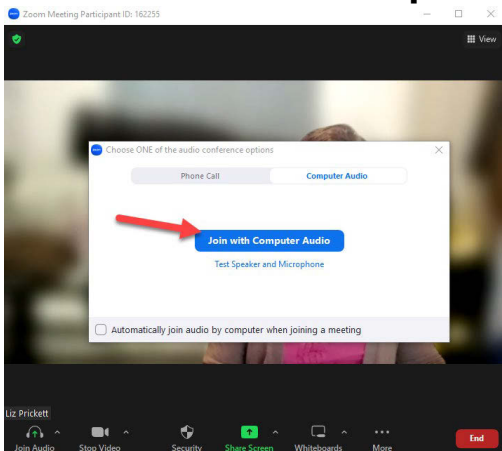
Recording note: While you will not typically record any personal meetings, some meetings, such as interviews or group projects, need to be recorded. This may discourage inappropriate behavior during meetings. Recording is also key for captioning to be provided later as needed. Be sure to inform participants they are being recorded. Zoom also automatically informs participants they are being recorded when recording begins. The application announces "Recording in progress" aloud, and "Recording stopped" aloud when recording stops. Each participant receives a visual prompt where they may either consent to stay in the meeting or leave when this prompt appears. After the meeting, the host may generate a report listing participants who provided consent.



1. Click on the **Start** button beside your scheduled meeting.



2. Click the **Join with Computer Audio** button.

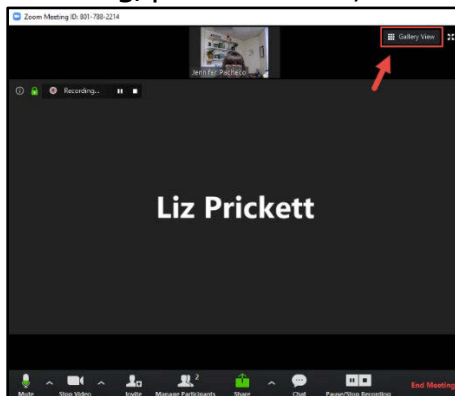


Note: If you've not previously tested your set up, please click the **Test speaker and microphone** link first.

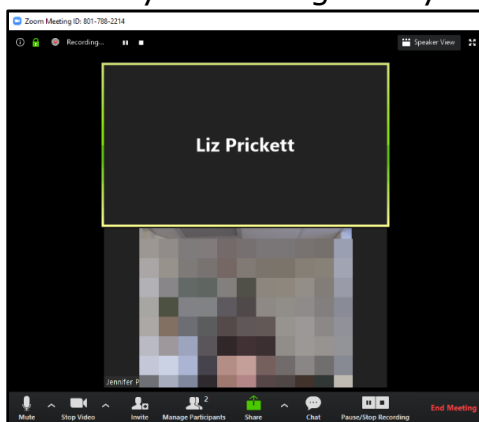
3. If your video is not on yet, click the **Start Video** button in the meeting toolbar.



4. Before starting to record, be sure your participants know recording will be taking place. Zoom will also inform them.
5. If you wish to record in **Gallery View**:
- a. Once all participants join and you're ready to begin the meeting/presentation, switch to **Gallery View**.



- b. In **Gallery View**, you should all have your cameras on and you will see participants equally on the screen. 3-4 participants will be shown in a quadrant view. Depending on your device, you may be able to see up to a 5x5 (25 participant view) or a 7x7 (49 participant view). This view may be managed in your Video Settings.



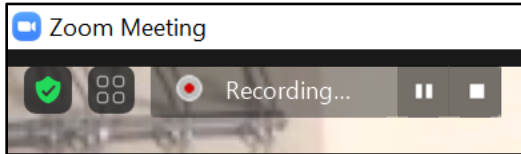
6. Once you're in **Gallery View** and ready to record, click the **Record** option.



7. You'll be prompted to select **Record on this Computer** (Alt + R) or **Record to the Cloud** (Alt + C).

Note: If you're recording to the cloud, you'll receive a brief message indicating you are connecting to the cloud server.

8. Once you've started recording, you'll notice a **Recording** notice at the top left of your screen.

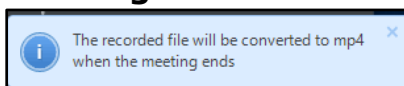


Note: If you need help, refer to Zoom's YouTube tutorial video [Recording a Zoom Meeting](#). You may **Pause Recording** during the meeting if needed.

9. Once your meeting/presentation is complete, click **Stop Recording**.

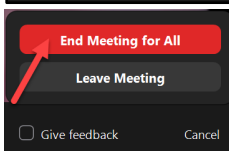
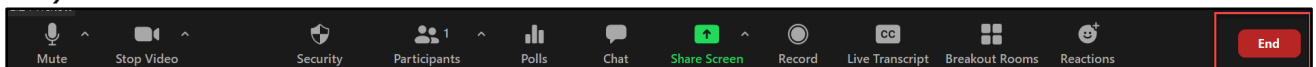


Note: If you selected the option to record to your computer, Zoom will probably provide a prompt: **The recorded file will be converted to mp4 when the meeting ends.**

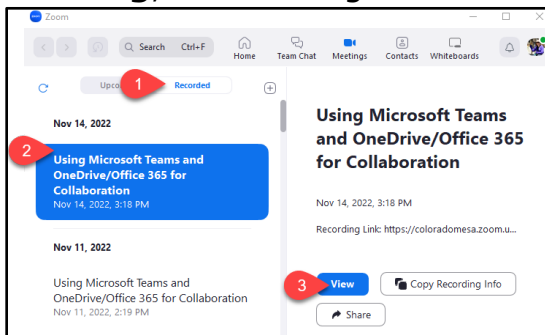


If you selected the cloud recording option, you'll receive a prompt asking **Do you want to stop cloud recording?** If Yes, you will receive an email notification when the cloud recording is ready. Click the **Yes** button if you're ready to end the recording.

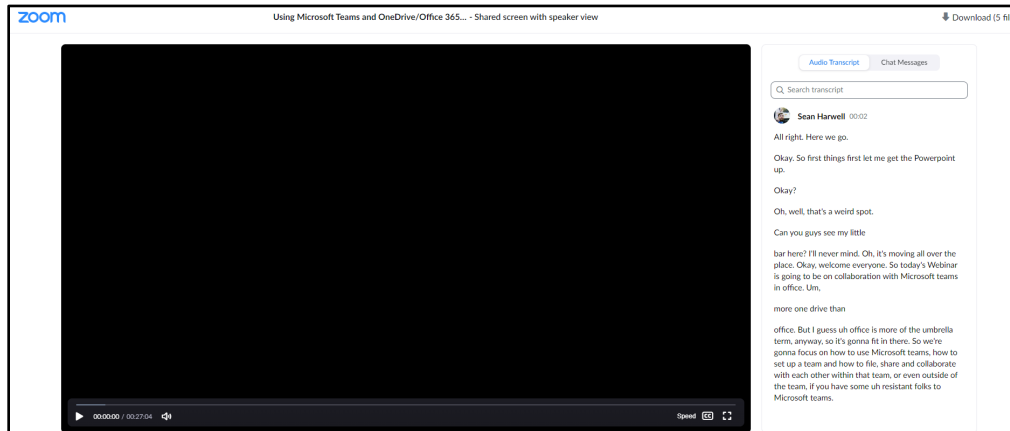
10. After you stop the recording, also click **End** (followed by **End Meeting for All**).



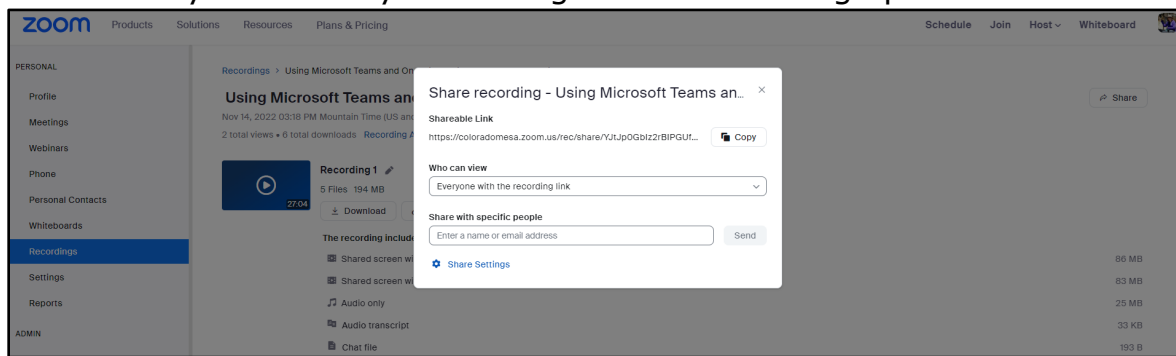
11. Your recording will process and be saved in your preferred recording location. (Refer to Step 4 of [Zoom Settings](#).)
12. You can access your Zoom recordings from the **Meetings** area of the Zoom application by going to the **Recorded** section, selecting the **applicable meeting**, and clicking the **View** button.



13. This takes you to the video, with captions and transcript. This allows you to download as well.

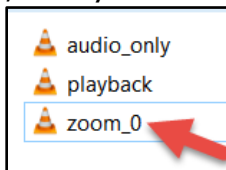


14. If you select the **Copy Recording Info** option, you may share this same URL view with others.
15. If you select the Share option, this takes you to your Zoom **Recordings**. This offers you a variety of sharing and downloading options.



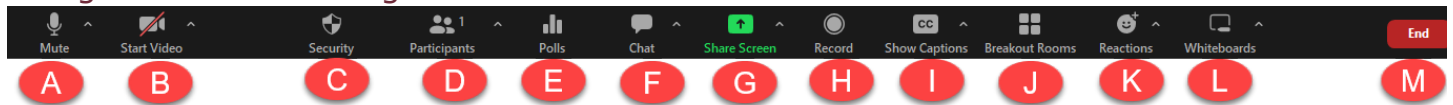
Notes:

- If you recorded to your computer, by default, your recording will be saved as an MP4 file titled "**zoom_0**". (There will also be an "audio_only" file and a "playback" file, but you won't use these.)

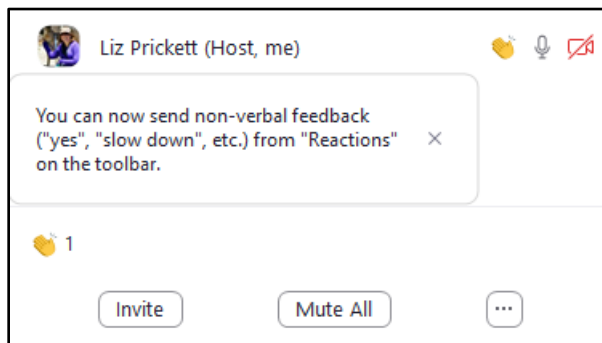


- If you recorded to the cloud, you will receive an email from Zoom <no-reply@zoom.us> indicating that your cloud recording is now available. The email will include 2 links, 1 for the host only, and 1 to share the recording with viewers.
- Be sure to abide by any applicable **privacy** (such as FERPA) expectations before sharing videos.

Using the Zoom Meeting Toolbar




- A. **Mute/Unmute:** Mute or unmute your mic. Clicking the **menu** options will also allow you to **Select a Microphone, Select a Speaker, Test Speaker & Microphone, Switch to Phone Audio, Leave Computer Audio, and Audio Settings.**
- B. **Start/Stop Video:** Start or stop your webcam/camera. Clicking the **menu** options will also allow you to **Select a Camera, Blur My Background, Choose Virtual Background, Choose Video Filter, Choose Avatar, and Video Settings**
- C. **Security:** (Only available to the meeting **host**) Click the **icon** to select **Lock a Meeting, Enable Waiting Room, Hide Profile Pictures, Allow Participants to: Share Screen, Chat, Rename Themselves, Unmute Themselves, Start Video, Share Whiteboards, and/or Suspend Participant Activities.**
- D. **Participants:** (Participant management options only available to the meeting **host**) Click the **icon** to see your **participant list, mute/unmute participants, start/stop video of participants, and/or invite other participants.** Clicking on the **3-dot menu** at the bottom right corner of the **Participants** pane will allow you to access additional options, such as **Ask All to Unmute, Mute Participants on Entry, Allow Participants to Unmute Themselves, Allow Participants to Rename Themselves, Play sound when someone joins or leaves, Enable Waiting Room, Hide Profile Pictures, and Lock Meeting.** The **Participants** area also displays non-verbal feedback options, such as yes, go slower, etc. which are available in **Reactions.**









- E. **Polls:** You can create a poll during a meeting or start a prepared poll.
- F. **Chat:** Click on the **icon** to access the **Chat** pane. Chats may be directed to **Everyone, host** or an **individual participant.**

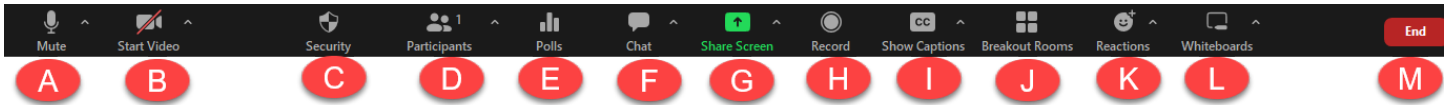
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Meeting reactions

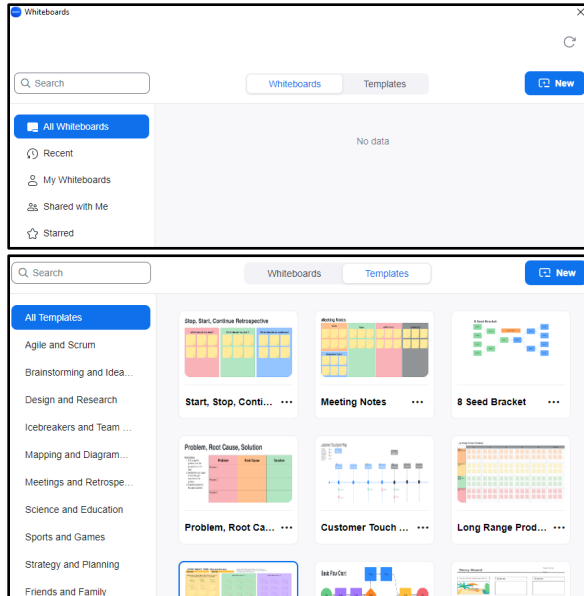
Allow meeting participants to communicate without interrupting by reaction with emojis (e.g., clap, heart, laugh). These emojis are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list for 10 seconds. Participants can change their emoji skin tone in Settings. 

☒ All emojis 

Selected emojis     



- L. **Whiteboard**: Clicking on the icon allows you to access all, recent, shared, etc. and start a **New** whiteboard. If you select the **Templates** option, you have a variety to use during your meeting.



When you open the board, you may use it in Collaborating or Presenting mode. And, you have the option for users to access the board after the meeting or not.

How do you want to open the board?

☒ **Collaborating:** Users are granted edit access

☐ **Presenting:** Board opens in presentation mode and users are granted view access

Do you want users to have access to the board after the meeting?

☒ Yes

☐ No

For more info, check out [The All-New Whiteboard](#) and [Creating and Collaborating with Zoom Whiteboard](#).

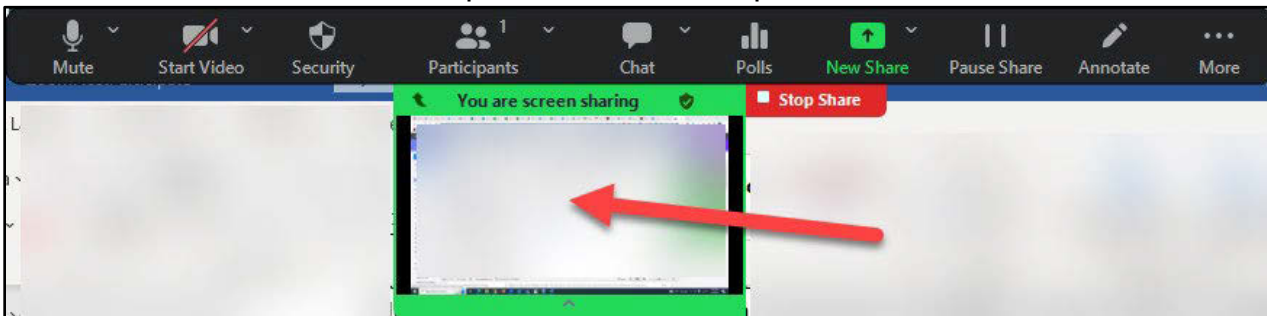
- M. **End/Leave Meeting**: Click to End or Leave meeting if you are the host (you may also assign another host if you leave). Click to Leave meeting if you are a participant.

Sharing Your Screen, Audio, or Video During a Zoom Meeting

Once you are in your Zoom meeting, you can share your computer screen and audio.

1. Click on the **Share screen** icon in the tool bar that pops up at the bottom of the meeting when you hover over with your cursor.
2. You will see a pop-up window where you **Select a window of an application you want to share**. This will show the different screens you have open and you can select the one you want to share. The shared screen will highlight in blue.
Note: you may want to close any personal or sensitive screens prior to starting the meeting to make sure you don't accidentally share sensitive information.
3. To enable computer audio in addition to sharing the screen, check the **Share Sound** box in the lower left corner of the share screen pop-up window. You also have the option to select **Optimize for Video Clip** and that is advised as well.
4. After you select the window/application you wish to share, click the **Share** button.
5. Now when you are in screenshare mode it will play **all computer sounds** to the participants.

Note: Zoom now offers a helpful screen share preview for the host.

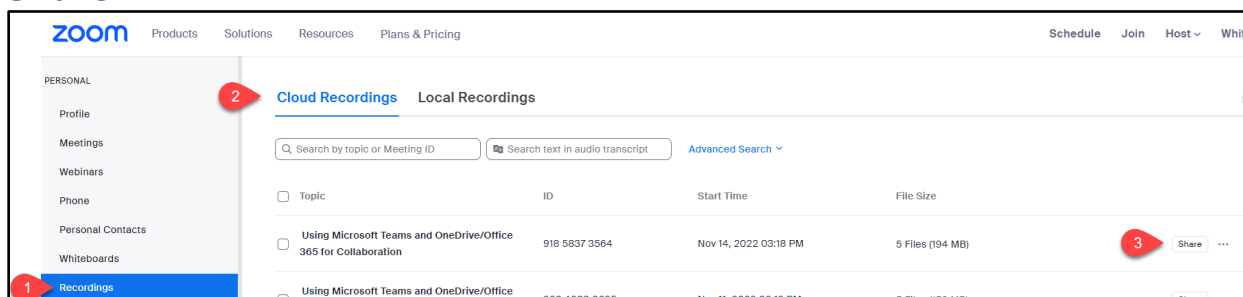


Sharing a Recorded Meeting

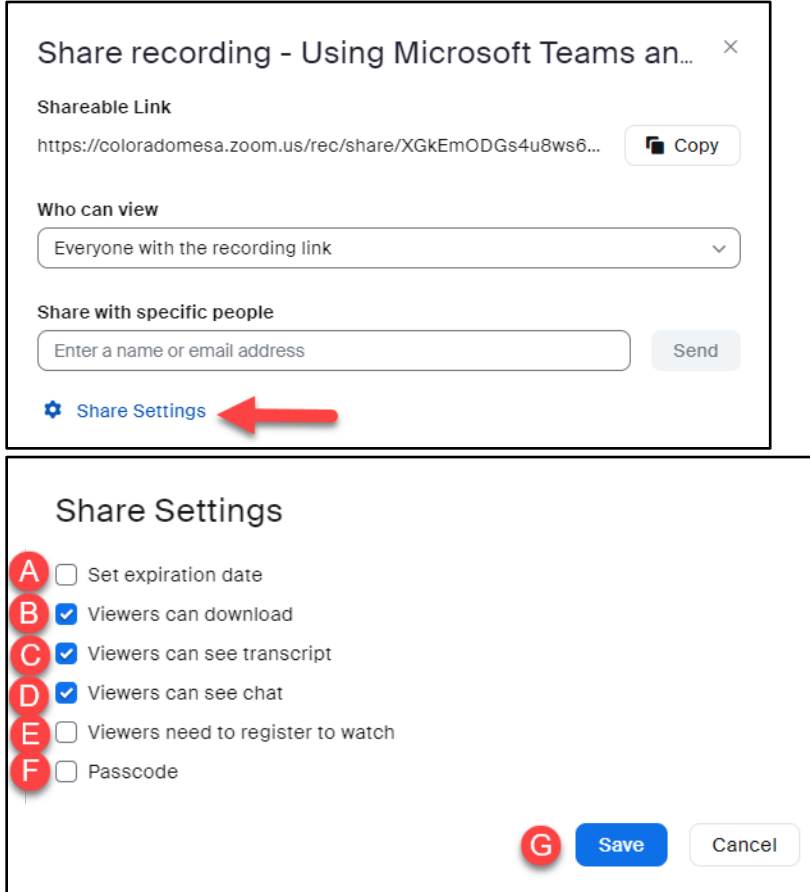
Be sure to abide by any applicable **privacy** (such as FERPA) expectations before sharing videos.

You will be able to share a **link** to the recorded meeting.

1. Go to **Recordings** > **Cloud Recordings** > navigate to your meeting and click **Share**.



2. In the **Share settings** dialog, adjust your settings as needed. (Screenshot shows the default settings.)



- a. **Set expiration date.** This may be useful in some cases. (Default off)
 - b. **Viewers can download.** Consider turning this option off. (Default on)
 - c. **Viewers can see transcript.** Leave this option on for accessibility. (Default on)
 - d. **Viewers can see chat:** Viewers may view the chat from the meeting recording.
 - e. **Viewers need to register to watch:** (registration required). (Default off)
 - f. **Passcode:** if enabled, you will need to create a strong password. (Default off)
 - g. **Save:** closes the dialog box.
3. Paste the sharing information/link into an email, D2L, Teams chat, etc. to share the recording.

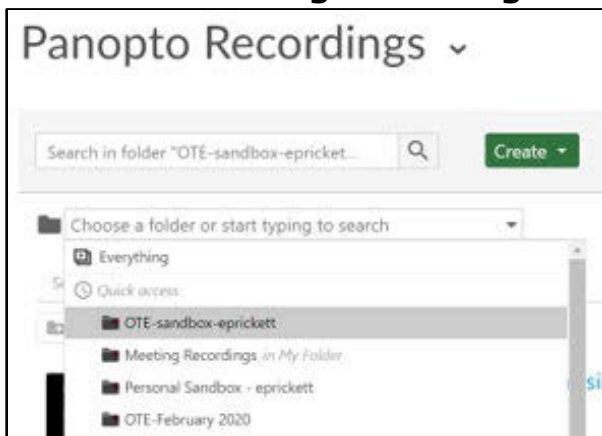
Cloud recordings are automatically captioned. Please review our [Zoom Accessibility guide](#). If you recorded to the cloud, you will receive an email once the audio transcript is available. This means the captions will also be available in the recording.

You may also **download** the recording to your computer and then **upload** it to a platform with which you are familiar, such as [Panopto](#). If you need to share it in D2L, you may do so via the **Insert Stuff > Embed Code** feature in the HTML editor.

For more information, check out Zoom's guide for [managing and sharing cloud recordings](#).

Panopto Meeting Recordings

Since Zoom and Panopto have an integration, Zoom **cloud recordings** will also be added to a **Meeting Recordings** folder in your **My Folder** in Panopto.



You have the option to share the Panopto version by adjusting the **Share** settings and then adding the Panopto video link within D2L, email, etc. For cloud recordings, the captions from Zoom will automatically go to Panopto. If you recorded to your device, you may add **captions** when you upload your video to Panopto by using the **import auto captions** option in the **Edit > Captions** area. These auto-captions are editable for accuracy. Check out our [Panopto captioning guide](#) for detailed directions.

Participate in a Zoom Meeting

Use these steps to **join** and **participate** in a Zoom meeting.

Notes:

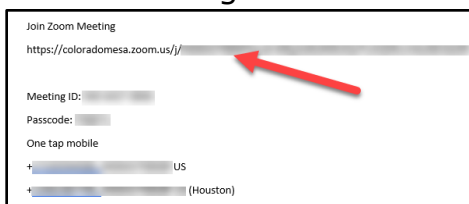
- Check out [Zoom System Requirements](#).
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- If you can't use the desktop version or just prefer the app experience, there is a [Zoom mobile app](#) available.
- If you are using a **Chromebook**, please refer to [How to Use Zoom on a Chromebook](#) and [Getting Started on Chrome OS](#). Cloud recording may not be available on a device using the Chrome OS. While you can still host a Zoom session on this device, you may have to [set another user as a co-host](#) or [allow others to record](#).
- You will should be able to join Breakout Rooms from a Chromebook but not on the web client. You will be able to join but not manage from the mobile app.
- If you are unable to install Zoom on any device, you may join a meeting via a web browser. The [Zoom web client](#) offers limited functionality. Use the Chrome, Firefox, or Edge (Chromium) web browser for the best functionality.

Participant Tutorial Videos from Zoom

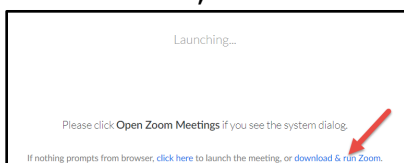
- [Join a Meeting](#)
- [Meeting Controls](#)
- [Sharing Your Screen](#)

Joining a Zoom Meeting

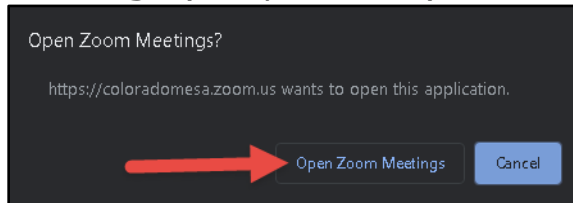
1. Follow the link shared by your instructor or host on the day and time of your Zoom meeting.



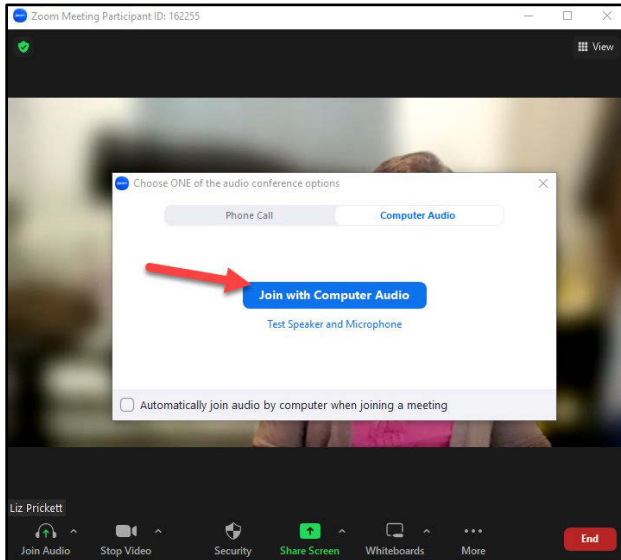
2. If you have never joined a Zoom meeting before, you might need to download and run the Zoom client application. Select **download & run Zoom**. Once downloaded, run the **Zoom_launcher.exe** (application) file.



3. If you have previously downloaded and run Zoom, your web browser will request your permission to open zoom meetings. Click the **Open Zoom Meetings** (or Open Zoom) button.

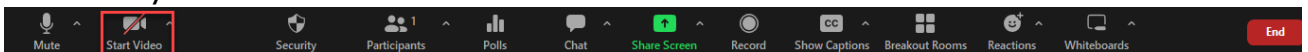


4. Once you connect to the meeting, click the **Join Audio Conference by Computer button** to be able to speak and hear others. You can also select to remember your audio joining preference by selecting the box **Automatically join audio by computer when joining a meeting**.

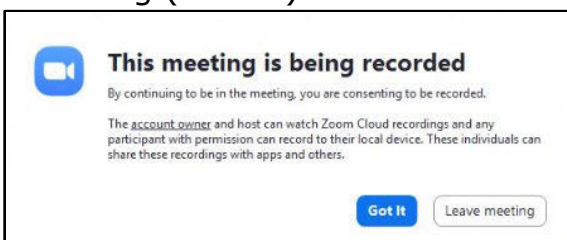


Note: If you do not have a microphone, you can choose to join via **Phone Call**.

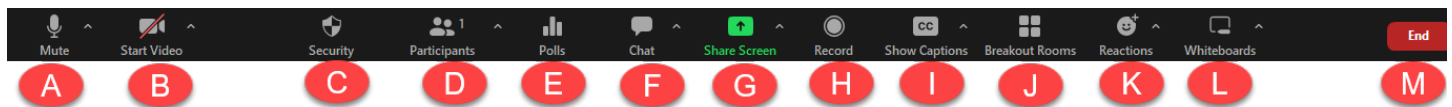
5. Once you have joined the audio conference, you may **Start Video** if you wish to share your webcam.



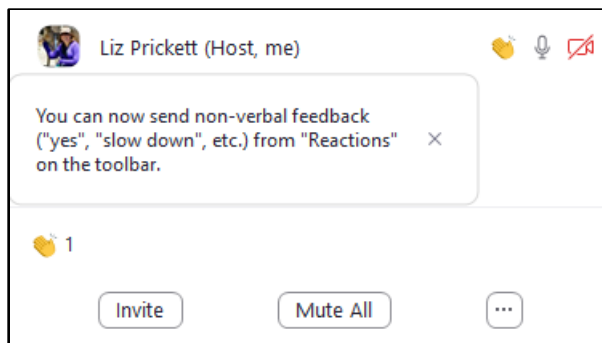
Note: The host may **Record** the meeting. The host of the meeting is responsible for recording if needed. The application announces "Recording in progress" aloud, and "Recording stopped" aloud when recording stops. You will be prompted to consent to recording (**Got It**) or leave the meeting (**Leave meeting**).



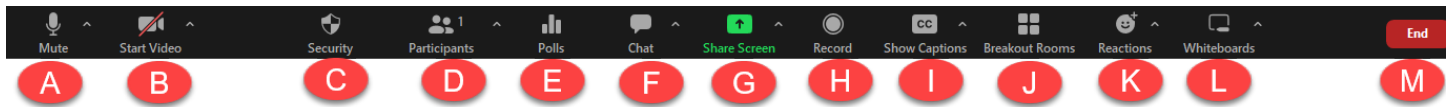
Using the Zoom Meeting Toolbar



- A. **Mute/Unmute:** Mute or unmute your mic. Clicking the **menu** options will also allow you to **Select a Microphone, Select a Speaker, Test Speaker & Microphone, Switch to Phone Audio, Leave Computer Audio, and Audio Settings.**
- B. **Start/Stop Video:** Start or stop your webcam/camera. Clicking the **menu** options will also allow you to **Select a Camera, Blur My Background, Choose Virtual Background, Choose Video Filter, Choose Avatar, and Video Settings**
- C. **Security:** (Only available to the meeting **host**) Click the **icon** to select **Lock a Meeting, Enable Waiting Room, Hide Profile Pictures, Allow Participants to: Share Screen, Chat, Rename Themselves, Unmute Themselves, Start Video, Share Whiteboards, and/or Suspend Participant Activities.**
- D. **Participants:** (Participant management options only available to the meeting **host**) Click the **icon** to see your **participant list**. The **Participants** area also displays non-verbal feedback options, such as yes, go slower, etc. which are available in **Reactions**.



- E. **Polls:** You can create a poll during a meeting or start a prepared poll.
- F. **Chat:** Click on the **icon** to access the **Chat** pane. Chats may be directed to **Everyone, host** or an **individual participant**.
- G. **Share Screen:** (Available to meeting host and participants, **if the host allows**) Click on the **icon** to select your window or application you wish to share from the **Basic** options, including a **Whiteboard** and **iPhone/iPad** option. This screen also allows you to check the option to **Share sound** and **Optimize for Video Clip**. The **Advanced** options allow you to share **PowerPoint as Virtual Background, Portion of Screen, Computer Audio, Video, or Content from 2nd Camera.**

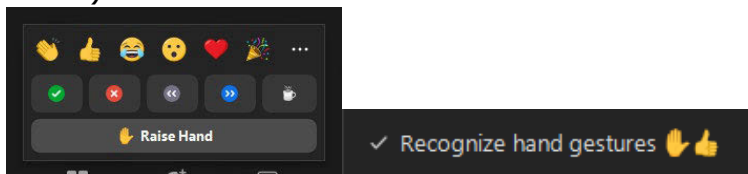


H. **Record:** (Host)

I. **Show Captions:** This option allows participants to view live captioning/transcript during the meeting. You can control settings and host controls. For more information, please review our [Zoom Accessibility guide](#).

J. **Breakout Rooms:** You can participate in Breakout Rooms during a meeting if the host enables them. You may be assigned automatically, manually, or the host may let you choose your room.

K. **Reactions:** You may use non-verbal reactions such as clap, thumbs up, joy, open mouth, heart, or tada. You also have the option to respond Yes, No, Slower, Faster, or I'm away. Hosts and co-hosts, as well as participants, now have the option to recognize hand gestures, too. (Note: The 3-dot option allows for additional reactions/emojis and allows the participant to change the skin tone.)



L. **Whiteboard:** Depending on how your host enables it, the host may use it in Collaborating or Presenting mode. And, the host has the option for users to access the board after the meeting or not.

How do you want to open the board?

☒ **Collaborating:** Users are granted edit access

☐ **Presenting:** Board opens in presentation mode and users are granted view access

Do you want users to have access to the board after the meeting?

☒ Yes

☐ No

For more info, check out [The All-New Whiteboard](#) and [Creating and Collaborating with Zoom Whiteboard](#).

M. **End/Leave Meeting:** Click to Leave meeting if you are a participant.

Captioning a Zoom Meeting & Other Accessibility Considerations

Check out our [Zoom Accessibility guide](#) to learn more about live transcription, captions for recordings, keyboard shortcuts, and more.

Resources

Check out our [Virtual Meetings Guide](#).

The following are short video guides from Zoom:

- [Zoom 101: Breakout Rooms](#)
- [Using Breakout Rooms during a Meeting](#)
- [Zoom 101: Polling \(In-meeting\)](#)
- [Polling for Zoom Meetings and Webinars](#)
- [Screen Share and Annotation](#)
- [How to use Waiting Rooms to Manage Office Hours & Drop-In Visitor Times](#)

The following are web guides from Zoom:

- [Testing Computer or Device Audio](#)
- [How Do I Test My Video?](#)
- [Scheduling Meetings](#)
- [How Do I Invite Others to Join a Meeting?](#)
- [Roles in a meeting](#)
- [Waiting Room](#)
- [Host and Co-Host Controls in a Meeting](#)
- [Managing Participants in a Meeting](#)
- [Sharing Your Screen](#)
- [Sharing Multiple Screens Simultaneously](#)
- [Sharing a Whiteboard](#)
- [Using Annotation Tools for Collaboration](#)
- [In-Meeting File Transfer](#)
- [Getting Started with Breakout Rooms](#)
- [Managing Breakout Rooms](#)
- [Participating in Breakout Rooms](#)
- [Polling for Meetings](#)
- [Controlling and Disabling In-Meeting Chat](#)
- [Saving In-Meeting Chat](#)
- [Local Recording](#)