Quick Reference Guide for Faculty Teaching Cases on Zoom v.2.0

This guide summarizes key instructions for teaching on Zoom. Detailed instructions and screenshots appear in the Annotated Reference Guide for Faculty. Zoom commands are highlighted in red font.
Recommendation: Print this QRG and the annotated version so you can reference them quickly while in class.

Before Class
Pre-Class Technology Check
You may wish to check audio, video and screen sharing functionality, etc., 15 minutes to 30 minutes in advance of your class session. You can use the Zoom session already prepared for your class and join the session early to conduct these tests. If you have a Teaching Assistant (TA), you might rely on them to help facilitate your class session(s).

NB: Zoom can be configured to place students in a “waiting room” before class; you can then admit the students (all at once or individually) when you wish to start the class. Students in the waiting room cannot hear or observe your tests.¹ If you have a TA, they can help with admitting students (see host/co-host information below).

1. You may want to consider some of the following issues in advance of your class session:
   a. Default settings (e.g., chat room settings, whether students will be on mute before class starts).
   b. Whether you will run in-class polls, or share videos, etc.
   c. If any additional technologies will be used (e.g., tablets)
   d. If faculty guests (e.g., case protagonists) will attend the session.²
   e. Whether you will use breakout rooms.

Always have the following available when you teach:
1. Your course’s 9-digit Zoom meeting ID (visible at the top of your Zoom session screen).
2. The mobile Zoom app downloaded on your phone.
3. A list of numbers you can use if you need to call into a Zoom session.³

Faculty Preparation
1. We recommend that you move all computer “desktop” files you will not use during the session to a “Temp” folder to have fewer distractions when looking for files to share during your session.
2. Prepare cold call lists, teaching plan, etc., as usual.
3. NB: Prepare any pre-class polls and download responses to review.
4. Create templates for any PowerPoint slides (or other media for boards) you plan to use.
5. Move onto your desktop, and open, all files you will use during class—PowerPoint slides, Excel files, links to videos in Kaltura or other sources, etc. (Be sure videos are cued and paused to where you want them to start.)

¹ Click here for more information on Zoom waiting rooms.
² Make sure guests attending the class have received sufficient information in advance (e.g., a guest “checklist”) to ensure they can successfully participate in the session.
³ Toll-Free U.S. numbers for calling into a Zoom session include: 888.475.4499 and 877.853.5257. Additional U.S. and International numbers are available at https://zoom.us/zoomconference.

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6. To be able to share PowerPoint slides in presentation mode (rather that edit mode), go to the Slide Show ribbon in PowerPoint, select Set up slide show and choose Browsed by an individual (window).

**Start the Zoom Session**
1. At least 15 minutes before your class starts: Sign into the Zoom session (you may need to click on Open Zoom Meetings) as directed by your school. Make sure you have your meeting ID available.
2. **NB:** If you configure Zoom to hold students in a “waiting room,” you will see the greyed-out names of waiting students at the top of the Manage Participants window. You can admit students to the session (individually, by clicking on names) or all at once (using Admit All) at the class start time or earlier. Only verified students should be admitted. You will need to admit late students manually.

**Change Hosts/Co-hosts**
1. Zoom defaults to designating Host status to whomever joins first.
2. If the instructor signs in first, the instructor will be designated as Host. In this case, the instructor can transfer the Host role to the TA by opening Manage Participants, hovering over the microphone to the right of the TA’s name in the participant list, choosing More, and selecting Make Host.
   a. The TA should then make the instructor Co-host by following the same steps and selecting Make Co-Host.
3. **Only the Host** can create breakout rooms, move participants between rooms, and end breakout room sessions; assign co-hosts; and end the Zoom meeting.
4. **Hosts and Co-hosts** can admit students to the session from the waiting room, mute/unmute participants, lower participants’ hands, move between and observe breakout rooms, and see the summary tallies for simple yes/no/slower/faster/slower responses.
5. **Hosts and Co-hosts cannot** raise their own hands or vote in polls.

**When You’re Ready to Start Class**
1. Make sure your audio is on by checking the Mute/Unmute icon. Click this icon to mute/unmute yourself.
2. Make sure your webcam is on by checking the Start/Stop video icon. Click this icon to turn your webcam on/off.
3. **Recommendation:** Start in Gallery View without sharing anything through Share Screen, so you can see as many people as possible during your preliminary comments.

**During Class**

**Screen Views**
1. At top right of Zoom screen, you can select **Gallery View** (small tiles of participants’ videos) or **Speaker View** (the person speaking appears in large tile in the center). The view icons appear at the top right of your Zoom screen.
   a. When you are in Gallery view, you will see the Speaker View icon; click it to go to Speaker View.
   b. When you are in Speaker view, you will see the Gallery View icon; click it to go to Gallery View.

**Manage Participants**
1. **Hand raising** When students “raise their hand,” a blue hand icon will appear in the participant’s video “tile” and will also appear next to their name in the instructor’s participant list.
   a. Names of students who first raise their hands appear at the top of the list. The names will remain in chronological order by when they raised their hand. You may need to scroll down/up to see all of the hands.
   b. As you move to a new discussion pasture, consider telling students you are “lowering” all of their hands and click Clear All to do so.
2. **Sound** Click Mute All to mute all students and Unmute All to unmute all students.
3. **Muting/lowering hands of individual students** As host or cohost, you can mute or lower the hand of any student individually by hovering over the student’s microphone and clicking mute (to mute the student) or lower hand (to lower the student’s hand). You may have to click on more by the student name to see all options.
Share Documents

1. **To share an application** (such as PowerPoint or Excel)
   a. Click the **green** Share Screen icon in the Zoom taskbar.
   b. In the dialogue box, choose the screen with the application open
   c. Click the blue **Share** icon at the bottom of the dialogue box
   d. Check that a **green border** has appeared outlining the window with the file you want to share
   e. **NB:** When screen-sharing, your Zoom task bar will move to the top of the Zoom window. You may need to hover at the top of the screen to see the Manage Participants icon or other Zoom commands.

2. **To share video**
   a. Select the video to show; cue it to where you want to start. Pause it and keep it paused until you share it.
   b. Click on **green share** icon at the bottom of the Zoom screen. To share video with sound you must select share computer sound **before** clicking the blue Share button. Once you have shared, then start the video.

3. **To stop sharing** anything, click the red Stop Share icon at the top of the Zoom window.

4. **Annotation:** While sharing a screen, you can click on the Annotate icon at the top of the Zoom menu to annotate your document. You must exit the annotation mode (click on the Annotate icon) if you wish to type on or scroll the slides during sharing. **NB:** Annotations are not saved with the file.

Chat

1. **Setting Chat Functionality:** At HBS, the default MBA policy is to set chat functionality to enable bidirectional student-to-faculty, student-to-TA, and faculty-to-TA communication. To configure the Chat function, the host should hover over the three dots to the right of the Chat window and select the desired setting.

2. **NB:** Faculty have discretion over whether student-to-student or student-to-all is enabled and can instruct the TA to change the chat setting.

3. **How to chat:** At the bottom of the Chat menu is a drop-down menu named **Everyone**.
   a. The default is to chat publicly. To do so, check that the blue menu reads **Everyone** and type in your comment below where it says, “Type Message here.”
   b. To chat with an individual, pull down the blue Everyone menu and type in or find the name of the person with whom you wish to chat.
   c. **NB:** Be very careful when you send private messages to not send to all.

Basic “Board use” with PowerPoint

1. Open PowerPoint with your board templates (with any headings, empty slides, etc.) set up in advance.
2. Type in comments as desired. You must be in edit mode (vs. presentation mode) to type on a slide.

3. **NB:** If things go wrong with writing using a tablet and stylus, it is always an option to use PowerPoint and type in notes or even draw on a piece of paper and hold it up to your camera.

Advanced “Board use” (Using Zoom’s Whiteboard or a Tablet)

1. The annotated guide provides instructions on how to use Zoom’s Whiteboard
2. To provide flexibility in writing comments or board diagrams, you may use a tablet and write on its touchscreen with a stylus. Be sure to charge your pen or have extra batteries for your stylus.
   a. Detailed instructions (one version for iPad users, one for Surface or other Windows-based tablets) for using a tablet for boards in Zoom are outlined in the annotated guide.
   b. **NB:** There may be a delay when sharing screens from a tablet.

Ending the Zoom Session

1. If you are the host, click End Meeting to end the session. **NB:** Only hosts can end the meeting.