Video Conferences for Instruction
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Wharton offers two different video conferencing options for instruction: Zoom and BlueJeans (for a comparison, see BlueJeans vs. Zoom).

All Wharton students, faculty, and staff have access to both services.

Before You Start
You will need the following before you can complete this task:

- An active PennKey account
- Faculty and Staff: admin access to your devices (to install the app)
- A wired/Ethernet connection if possible (recommended for the instructor)

The recommended way to schedule a meeting depends on whether you are creating a meeting with a few individuals outside of a Canvas classroom, or for your class using Canvas.

Wharton Computing recommends Zoom for teaching in nearly all cases.

Scheduling a Meeting Through Canvas (Recommended for Instruction and Classes)

Creating your meetings through Canvas will take care of scheduling for the class, provide the link to all class participants, and preserve the privacy of your personal meeting account.

Note: We recommend that instructors – not TAs – create each class meeting (or sequence of recurring meetings) within Canvas. If changes or cancellations must be made after creating a meeting, please do so within your Canvas course, not through your video conferencing app or account.

Zoom

For step-by-step instructions on how to schedule a Zoom meeting through Canvas:

1. Launch your classroom in Canvas (go to canvas.upenn.edu).
2. Select Zoom in the left sidebar.
3. Click the **Schedule a New Meeting** button in the upper right side of the screen.

   ![Schedule a New Meeting button](image)

   **Note:** The first time you access Zoom through Canvas it will request access to your account. Click **Authorize**. You may need to log in, with your PennKey, to authorize Zoom.

4. Fill in the details of the class. **Include all the details about your class in the Meeting title** – if your class has multiple sections in the same Canvas room, all students will be able to access all sessions, so students should be told to join only the section for which they are registered.
a. **Topic:** Enter the class, section number, time, and meaningful title (e.g. MKTG XXX Section 001 - 10:30 am - Online Class Meeting). Identify your meeting clearly so students can easily pick it out from their other meetings (e.g. "Lecture" won’t identify it as their Marketing Class). You can also enter a **Description** if you like, but this is optional.
b. **When:** Set the start time, duration, and Time Zone.
Recurring meetings can be checked or unchecked. Be sure to fill in the proper class start and end dates:

Use the single arrow to page through the months, and the double arrow to page through the years.

c. **Registration**: Since all of your students will have Penn Zoom accounts we recommend you leave Registration unchecked. If you check it your Zoom meeting will require people to register ahead of time. More details about this can be found here.

d. **Security**:  
   - **Passcode** - We recommend that you require a Passcode for your meetings. Most attendees won’t need to manually enter the code as it will be part of the URL included in the meeting invite.
   - **Waiting Room** - The Zoom Waiting Room gives you the ability to preview the attendees before they enter the meeting. This will make your meeting more secure, but it does require someone admit each student (either one by one or in bulk).
   - **Require authentication to join** - [Note: as of 9/22/21, Zoom has confirmed this feature is temporarily unavailable in their LTI Pro integration; they are working on restoring it.] You can limit participants to your meeting to either Penn Zoom users or Zoom users in general. Selecting either option will require participants to log in using the proper Zoom credentials.

e. **Video**: This setting determines if the Host’s and participants’ cameras are on or off when they enter the meeting. “Off” is the default.

f. **Meeting Options**: You have a few options that you can set up for your meeting. Here’s what each does and our recommendations around them:
   - **Enable join before host** - Leave this unchecked. If checked your Zoom meeting (and the recording, if the meeting is set to auto-record) will start the moment anyone joins the meeting. Many people join meetings way ahead of time to test settings, and leaving this unchecked ensures the meeting won’t start until you want it to.
   - **Mute participants upon entry**: When checked the video and audio of participants will be muted automatically when they enter. We recommend you leave this unchecked, though if you prefer to have more control over the initial moments of your class you should check it.
   - **Use Personal Meeting ID**: This option **SHOULD NOT** be checked. If it is checked, Canvas will associate all the meetings you have with your Personal ID with this Canvas site. You don’t want that.
- **Record the meeting automatically**: Check this box to ensure your Zoom session is recorded. The Zoom meeting record will start the moment one person joins the meeting; each participant is notified that the meeting is being recorded upon entry. "In the cloud" is the default destination for your recording, and we recommend you keep this set as is.
- **Confirm Closed Captioning is Enabled**: Enabling closed captioning allows you as host, or your attendees, to turn on automatic closed captioning options. You as host must enable this option in the meeting itself before it can be available to your attendees.

  **Alternative Hosts**: You can manually add additional alternative hosts here. Note that alternate hosts need to be added in the format: pennkey@upenn.edu (NOT pennkey@school.upenn.edu).

5. Click **Save** and your Zoom meeting is scheduled. The details are displayed for you:

   ![Zoom meeting schedule](image)

   The scheduled Zoom meetings will be listed on the Zoom tab for you, and your students:
Now that your meeting is scheduled, you may want to add pre-assigned breakout room assignments to your meetings. See our article Video Conference Breakout Rooms to learn more about pre-assigned breakout rooms.

Recordings (Zoom)

Any Zoom meetings scheduled through Canvas (see the above instructions) and set to record will have its recording automatically posted to "Class Recordings" in the Canvas section shortly after the meeting ends.

Beginning October 26, 2020, backup copies of Zoom recordings initiated through Canvas will not be stored in Zoom once the recordings have been moved to Canvas. Instructors will still be able to access these recordings in Canvas. (Contrary to earlier announcements, this will affect all recordings - recordings made prior to October 26 will also be removed from Zoom.)

Recurring meetings will all have the same title, but are differentiated by the dates included in the recording description.
BlueJeans

For step-by-step instructions on how to schedule a BlueJeans meeting through Canvas, click Read More:

Recordings (BlueJeans)

All recorded BlueJeans classes set to record through Canvas will appear in the "Recorded BlueJeans Meetings" section of the BlueJeans tab. They can also be accessed via the Recording tab at https://meetings.wharton.upenn.edu in the account of the person who scheduled the meeting.

If you’d like your BlueJeans recordings to show up in the “Class Recordings” tab, follow these instructions.

Questions?

For additional help and support:

- See our Zoom FAQ or BlueJeans FAQ
- Contact your academic support representative
- Check out the Knowledge Bases for Zoom or BlueJeans