



Best Practices & Zoom Etiquette for Conducting a Remote Dissertation or Thesis Defense

The University of Iowa's [response to COVID-19](#), which includes a shift to telework to minimize presence on campus, has also impacted thesis and dissertation defenses in spring 2020. As noted in the Graduate College [FAQs](#), all final exams, including thesis and dissertation defenses, must be conducted remotely in spring 2020.

We recommend conducting your remote exam via [Zoom](#), which is the university-sponsored web-conferencing solution.

We hope these best practices assist you and your committee as you plan and conduct your remote defense.

Quick Links to the information you need most

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| ❖ Advice for committee chairs | ❖ Creating the Zoom meeting |
| ❖ Advice for defending students | ❖ Sharing your screen |
| ❖ Advice for committee members | ❖ Using the waiting room |

Committee Chair

The dissertation or thesis chair is responsible for ensuring that the student and all members of the committee have the necessary technology to participate in the defense. Committee chairs should inquire with all participants about their needs. If assistance is needed, your collegiate [ITS](#) specialist can help.

The committee chair, in consultation with [ITS](#), is responsible for:

- Scheduling the Zoom event. Please see instructions, including identifying an alternative host, beginning on page 5.
- Accommodations for the student and committee
- Ensuring that all requirements for remote participation are met
- Ensuring that remote technology is sufficiently tested prior to the defense that the remote participation is uninterrupted and, if interrupted, that the defense is paused until all remote participation is fully restored.

- If additional help is needed, please contact the [Graduate College](#).

Before the defense:

- Committee chairs should consult with the student to confirm which video conferencing program will be used ([Zoom](#) is recommended), but the advisor should [create the Zoom meeting](#) and share its access information with the student and committee.
- During the defense, the chair should be the point person for maintaining smooth operation of the technology. Please prepare accordingly (consulting with [ITS](#) as necessary) and do not leave this to the student, even if you think the student is more adept at technology than you are.
- Conducting an advance “test run” with your student can ensure that both you and they are comfortable with all functions (starting the meeting, screen share to display PowerPoint or other files, chat window interface for asking questions, etc.).
- At least one week prior, but no later than the day before, the committee chair should communicate key information to the student and other committee members:
 - The URL to access the Zoom meeting (including the date and time)
 - The planned order of events for the defense (e.g., note whether public questions will occur)
 - Indicate that you, the committee chair, will start the meeting at least 15 minutes in advance so participants can check in and ensure that their audio and video are working effectively.
 - Establish the preferred strategy for committee members to ask questions during the defense. Considerations might include: (i) if questions are asked during the presentation or saved until after the presentation and/or (ii) whether questions should be typed in the “chat” window vs. using a “raise hand” option to alert the presenter to a question then asked through video/audio.

At the defense:

- Log in and start the meeting at least 15 minutes in advance to address any pre-meeting technology check-ins by the student and/or committee.
 - During this time, also consider posting a brief, written summary of the agenda/rules in the chat window so that all participants and any public attendees have a reminder.
- At least 2-3 minutes prior to the start of the meeting, orient attendees to the technology and protocol for any questions during the defense. Considerations could include:
 - Whether questions are held until after the presentation or posed during the talk
 - Whether/when to type questions in the “chat” window vs. use a “raise hand” option before asking by video/audio
 - Suggesting that everyone mute their microphones during the student’s presentation (Host/meeting organizer, i.e., you, the committee chair, can mute participants as well).
- At the start, begin introductions as you would for a live defense--introduce the student and committee, announce the agenda for the defense (e.g., whether public questions will occur)—and proceed to the student’s presentation.

- If bandwidth becomes an issue, you might suggest that people who are not required participants [turn off their video](#) except when they are speaking.
- If you are holding a public question-and-answer period (optional), consider ways to ensure that questioning happens equitably. Some options include setting an order for participants, e.g., audience/committee or student/faculty/committee, and/or asking participants to write questions in the chat feature so that all questions can be asked in a relatively orderly manner. Most platforms also have a “hand raise” function.
- Utilize the [waiting room feature](#) to allow the student to “step out of the room” during the committee’s discussion.

Committee Members

All committee members are responsible for ensuring that they know how to use the [Zoom](#) conferencing platform in advance of the defense. Video is not the only way to participate in a Zoom meeting, e.g., attendees can simply dial in using a phone, although this would render a participant unable to view slides. Those could be displayed on a separate monitor if shared ahead of time.

Do a test run, and consult ITS with questions if needed. Please be sure to [activate your UI Zoom account](#) prior to the dissertation/thesis defense. Please visit the [Accessibility 101 Course](#) for resources on accessibility.

Student

In advance of the defense:

- Make sure you know how to use the chosen video conferencing site ([Zoom](#)). Download and test it in advance.
- Practice in the video conference environment. You would have practiced anyway, but it is important to practice in this different environment, not just in front of your mirror.
- Share any slides with your advisor before the start of the defense. Ensuring someone else has them and could potentially share them if necessary is a good back up plan. Be sure to practice [sharing your screen](#) on beforehand to ensure that the slides will be visible to participants.
- Check with your advisor about the process for you “stepping out” of the room during the committee’s discussion.
- When you share your screen, it’s a good idea to select the specific window with your slides so that you don’t share other screens inadvertently.
- Plan your physical space for the defense:
 - Be sure there’s no glare from sunlight or other light behind you, but also ensure that there is enough light so that you can be seen without a shadow.
 - Try to sit in a quiet location without too many distracting things behind you.
 - Access to two monitors will make the process a bit easier; you can see your slides on one monitor as you present and still see committee members on

- another monitor, to see reactions. (Hint: it may be possible for your television, with an HDMI cable, to be a second monitor)
- If someone you live with is attending the defense, plan for them to use a separate computer or phone, with a separate webcam; ideally, they should also be in a separate room or at least distant enough from you to not cause feedback from microphones and speakers.

At the defense:

When delivering the presentation, sit and be sure that your webcam has a good shot of you from the shoulders up. In a live defense, you would probably be standing, but that won't work here since you won't be as clearly visible (you don't want to suddenly be defending only from the neck down).

- Even though you are sitting, and you are communicating via videoconference, your gestures and nonverbal communication still matter. Think about how you will emphasize or punctuate some of your main points in your delivery, for instance. Gestures may work, or pragmatic pauses may work too. But, just as in a face-to-face talk, practice to avoid all those verbal fillers—um, ah, you know—that clog your communication.
- Remember to look at the camera when you are talking (and not at the screen you are presenting, particularly if you are using two monitors).

All Participants

- Do not multitask during the defense.
- Remember that lag time in sound can occur on a video conference; give people time to respond to avoid speaking over people.
- Avoid distractions in your environment (glare, shadows, overly cluttered backdrop, etc.)
- Headphones, if available, can reduce potential background noise.
- Facial expressions may not be as clearly noticed online as they would in an in-person setting; exaggerate your motions (nods, etc.) more than usual to convey your emotions.

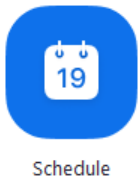
* This guidance has been adapted from The University of Maryland Graduate School's ["Advice for Remote Dissertation/Thesis Defenses"](#)

Zoom Guidelines for Dissertation and Thesis Defense

Zoom is a web conferencing tool that is widely used for virtual class sessions, online team meetings, and webinars. Zoom offers support for screen reader and keyboard-only users, and most features are generally accessible for people with disabilities. For more information, please visit the [Office of Teaching, Learning & Technology's Zoom page](#). Below are some guidelines for using Zoom for the dissertation and thesis defense.

Creating a Meeting for the Dissertation or Thesis Defense

1. Open your Zoom client and sign in to Zoom.
2. Click on the **Schedule** icon. This will open the scheduler window.



3. Select your meeting settings.



[My Meetings](#) > Schedule a Meeting

Schedule a Meeting

Topic

"Student Name" Dissertation / Thesis Defense

Description (Optional)

Enter your meeting description

When

04/02/2020



10:00



AM



Duration

2



hr

0



min

Time Zone

(GMT-5:00) Central Time (US and Canada)



Registration	<input type="checkbox"/> Required
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Schedule For	<div>Myself</div>
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Meeting ID	<input checked="" type="radio"/> Generate Automatically <input type="radio"/> Personal Meeting ID 754-207-3985
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Meeting Password	<input type="checkbox"/> Require meeting password
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Video	Host	<input checked="" type="radio"/> on <input type="radio"/> off
	Participant	<input checked="" type="radio"/> on <input type="radio"/> off

Audio	<input type="radio"/> Telephone <input type="radio"/> Computer Audio <input checked="" type="radio"/> Both
	Dial from United States of America Edit

Meeting Options	<div><div><input type="checkbox"/> Enable join before host</div><div><input checked="" type="checkbox"/> Mute participants upon entry </div><div><input checked="" type="checkbox"/> Enable waiting room</div><div><input type="checkbox"/> Only authenticated users can join</div><div><input type="checkbox"/> Breakout Room pre-assign</div><div><input type="checkbox"/> Record the meeting automatically on the local computer</div></div>
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Alternative Hosts	<div>[enter <u>U</u><u>i</u><u>l</u><u>o</u><u>w</u><u>a</u> email of other hosts]</div>
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Save

Cancel

- **Topic:** Enter a topic or name for your meeting.
 - **Start:** Select a date and time for your meeting. You can start your meeting at any time before the scheduled time.
 - **Duration:** Choose the approximate duration of the meeting (2 hours). This is only for scheduling purposes. The meeting will not end after this length of time.
 - **Time Zone:** By default, Zoom will use your computer's time zone. Please be sure to click the drop-down menu to select a different time zone, if necessary.
 - **Video**
 - **Host:** Choose if you would like the host video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.
 - **Participant:** Choose if you would like the participants' videos on or off when joining the meeting. Even if you turn off, the participants will have the option to start their video.
 - **Audio:** Select **Both** for audio so that your participants have the option to use their computer audio or to dial in.
 - **Advanced Options:** Click on the arrow to view additional meeting options.
 - **Waiting Room:** The Waiting Room feature allows the host to control when a participant joins the meeting. As the meeting host, you can admit attendees one by one or hold all attendees in the waiting room and admit them all at once. Participants will see the following screen when joining a meeting with Waiting Room enabled:
 - **Alternative hosts:** Enter the email address of another Zoom user to allow them to start and moderate the meeting. **This feature is particularly important if staff assist with creating meetings. The person creating the Zoom meeting should add the committee chair as an Alternative Host so that the chair and/or a staff member can manage the meeting, e.g., send the student to the waiting room for the private deliberations.** In order to be an **Alternative Host**, you need to have an active UI Zoom account. You can activate your UI Zoom account by signing in with your Hawk ID and password at uiowa.zoom.us. [Read more about the Alternative Host feature here.](#)
 - **Calendar:** Select a calendar service to add the meeting to and send out invites to participants.
4. Click **Schedule** to finish and open the selected calendar service to add the meeting. You can share the URL and Meeting ID with all participants. The meeting ID (XXX-XXX-XXX) will always follow the URL link. For example: <https://uiowa.zoom.us/j/XXXXXXXXXX>.

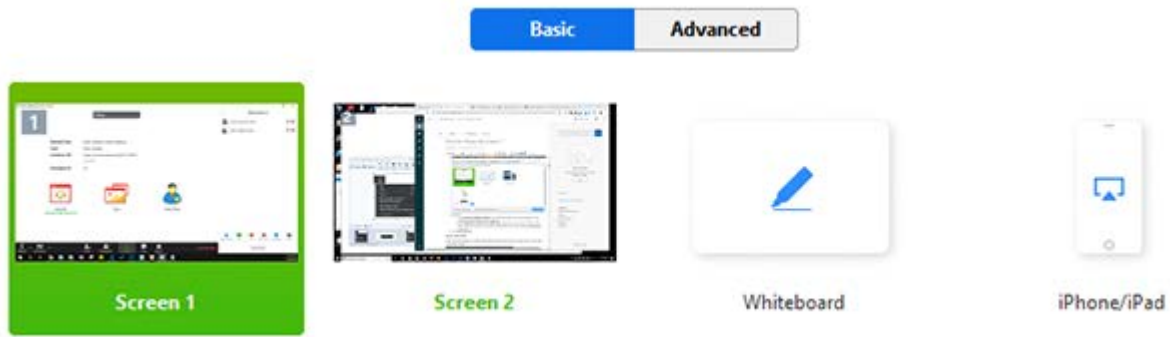
For more help with scheduling a meeting visit: <https://support.zoom.us/hc/en-us/articles/201362413-Scheduling-meetings>

Sharing Your Screen

1. Click the **Share Screen** button located in your meeting controls.



2. Select the screen you want to share. You can also choose an individual application that is already open on your computer, the desktop, a whiteboard, or an iPhone/iPad.



3. (Optional) Enable these features:
 - Check **Share Computer Sound**: If you check this option, any sound played by your computer will be shared in the meeting.
 - Check **Optimize for full screen video clip**: Check this if you will be sharing a video clip in full screen mode. Do not check this otherwise, as it may cause the shared screen to be blurry.
4. Click **Share**.
 - Zoom will automatically switch to full screen to optimize the shared screen view. To exit full-screen, click **Exit Full Screen** in the top-right corner or press the **Esc** key.
 - To disable automatic full screen when viewing a shared screen, disable this option in your desktop client settings: **Enter full screen automatically when a participant shares screen**.

For more information, please click [here](#) to find more information on sharing a PowerPoint or software application to allow your students to see what is on your screen.

Using the Waiting Room Feature

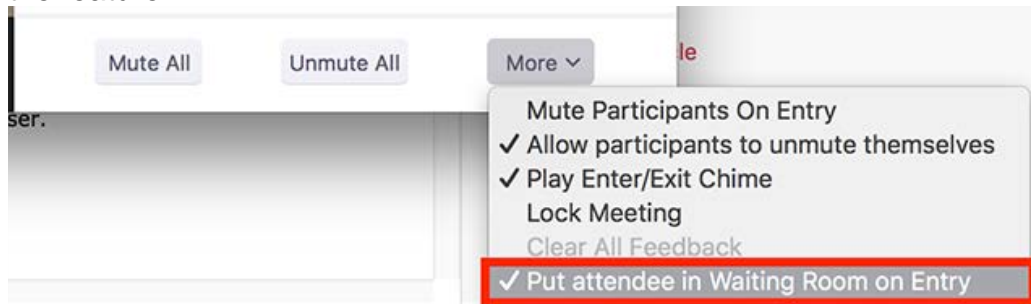
This feature will allow the chair (host) of the committee to move the student into a “Waiting Room” so that the committee can have their discussion. Please see below for the steps on using the Waiting Room feature.

Enabling or disabling Waiting Room during a meeting

1. As the meeting host, click **Manage Participants**.



2. Click **More** and choose **Put Attendee in Waiting Room on Entry** to enable or disable the feature.

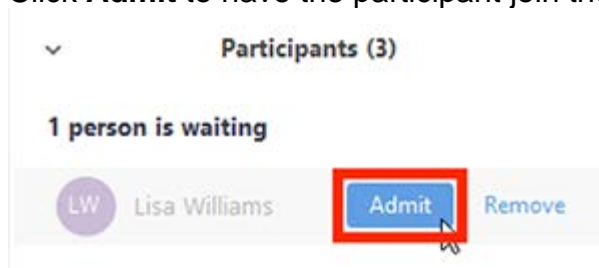


Admitting participants during a meeting

1. As the meeting host, click **Manage Participants**.

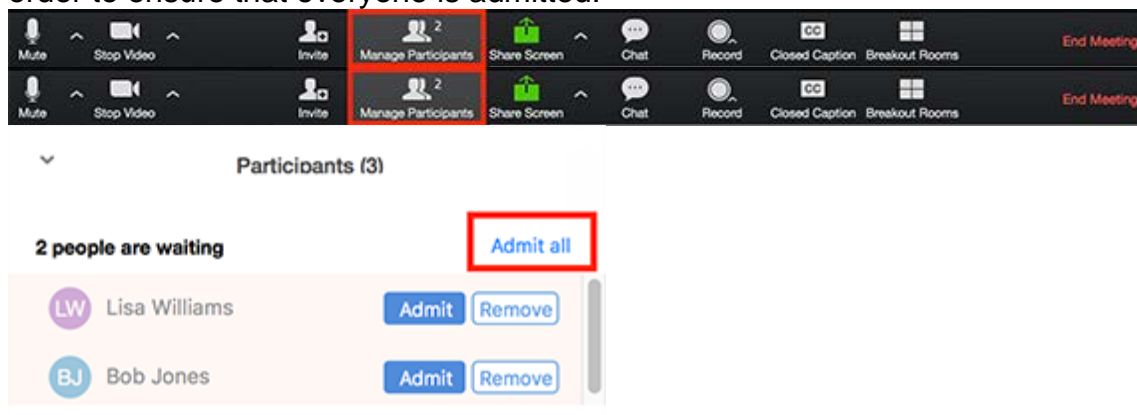


2. Click **Admit** to have the participant join the meeting.



3. **Admit all participants from the Waiting Room.**

4. As the meeting host, click **Manage Participants** and click **Admit all**. Be sure to continue to monitor the waiting room until all participants or audience members have joined in order to ensure that everyone is admitted.

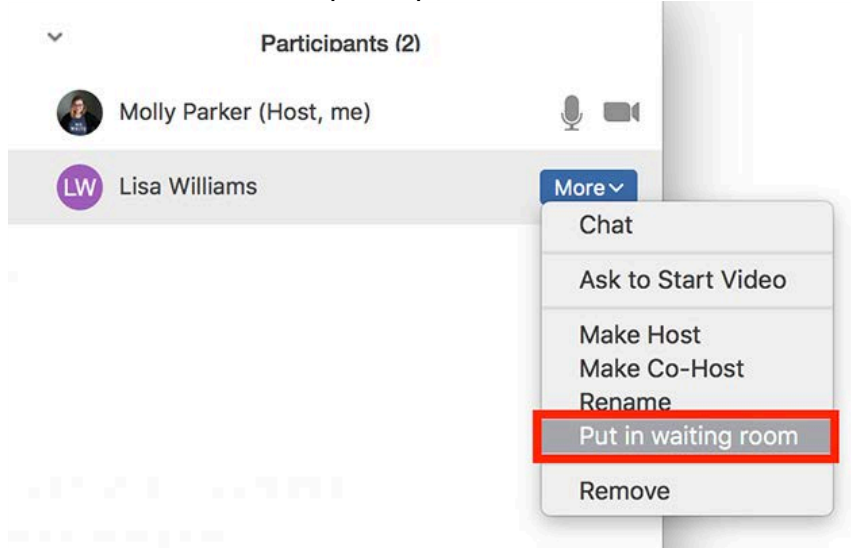


Sending participants to the Waiting Room during a meeting

1. As the meeting host, click **Manage Participants**.



2. Click **More** next to the participant's name and choose **Put in Waiting Room**.



UI Resources

- [Keep Teaching](#): A collection of curated resources from the Office of Teaching, Learning, & Technology to the transition to virtual instruction
- [Keep Learning at Iowa](#): A collection of curated resources from the Office of Teaching, Learning, & Technology to support students through the transition to virtual instruction.
- [Online Help Sessions](#): Get individualized help with your educational technology questions or issues.
- [Campus Coronavirus Updates](#): Stay up to date on the latest campus information about COVID-19 and connect your students to resources and information.
- [University Drive-Up Wi-Fi](#): Access university Wi-Fi from your car in parking lots at different locations.
- [Accessibility 101](#): Resources to help individuals manage accessibility with the online transition.

Zoom Resources

- [UI Zoom Basics](#): Learn the basics of the Zoom web conference software available through the University of Iowa
- [Zoom Overview](#): Great, short (10 min) overview of how to use Zoom from UI Professor Beth Livingston
- [Joining Meetings](#): Overview of the process of joining a meeting
- [Share your Screen](#): Share a PowerPoint or software application to allow others to see what's on your screen
- [Breakout Rooms](#): Split participants into small web-conference groups within a Zoom meeting
- [Polling](#): Use polls to take the temperature of the room and get check for understanding.
- [Whiteboard](#): Use whiteboards like you do in the classroom – work problems, brainstorm, and collaborate
- [Waiting Room](#): Use the waiting room to help manage when participants enter the room.