

Virtual Dissertation/Thesis Defense Using Zoom: Recommendations

Academic Technology strongly recommends using the following Zoom meeting settings and in-meeting management strategies to ensure you have a secure and productive Dissertation Defense meeting, while also allowing for participation and input, as appropriate, from meeting attendees.

In general Zoom settings, configure the following meeting options:

These settings will affect all of your Zoom meetings, so you may need to adjust some back depending on your needs for other meetings. You will need to adjust these from the main OUHSC Zoom web page: <https://ouhsc.zoom.us/>.

- **Make sure private chat is disabled.** Leave the normal chat function enabled and restrict it once in the meeting so the Host/Co-Host can send messages to the group, but no one else can send chat messages.
- **Screen sharing.** Make sure sharing is disabled for participants *other than the student defending*, who will be a co-host.
- **Disable Annotation.** This will turn off participant's ability to annotate on a shared screen during a meeting.
- **Disable Whiteboard.** This will turn off the whiteboard function for participants.
- **Make sure Nonverbal feedback is enabled.** The Nonverbal feedback setting is located just a little below the Sharing settings, make sure this is enabled so participants can raise their hands and engage in other nonverbal communication.

When advisors create/schedule a Dissertation Defense meeting, use the following settings:

These options are set when you schedule your meeting. They will help to ensure that your meeting is attended only by those participants who you intend to invite.

- **Generate Meeting ID Automatically** – This will also help to ensure the security of your meeting as the meeting ID will be new and randomized for each new meeting you create.
- **Require Meeting Password** – This setting should be checked by default, but it is a good practice to keep the password enabled. This will also help ensure the security of your meeting.
- **Set Participant Video to off** – This will turn off participant video by default.
- **Enable join before host** – This will place any meeting participants in waiting room if they join the Zoom meeting before the meeting Host.
- **Mute Participants upon entry** – This will mute all participants when they enter the meeting. A Host or Co-Host will need to unmute users before they can speak.
- **Enable waiting room** – This feature places all participants in a waiting room until allowed into the room by the meeting Host/Co-Host. (This feature is now locked "On" for security purposes.)

For Advisors

In advance of the defense

- Advisors should create and share the Zoom invitation to join. At the time of the defense, you should be the point person for any technology difficulties. Please do not leave this to the student, even if you are sure the student is more adept at technology than you are.
 - The advisor should create separate Zoom meetings for the public and private components of the defense, particularly if the public defense includes individuals other than the student and the committee. The Zoom meeting access details for the private component of the defense should only be communicated to the student and the committee and not shared with others.
 - For the private defense, determine how you will have the student “step out of the room.” This can be accomplished by having the committee all move to a [breakout room](#) then return to the main room when they are done with their discussion, or putting the student on “hold” during the discussion.
- Consider offering a “test run” with your student to ensure that the technology works and that they are comfortable using it to present their findings and answer questions.
- Be sure you have a back-up phone number for all required participants in case there is a problem with the technology. Being able to reach participants by phone can help troubleshoot a solution.
- With the increased number of people using Zoom as a meeting and presentation platform, there are a number of emerging security concerns. It is important to take security precautions before and during the defense to prevent intrusion. Please refer to the [Zoom Meetings: Security and Privacy page](#) on the OUHSC Teach Anywhere website.

Meeting Management

Advisors should be the “host” of the meeting. The first thing you should do immediately after you start the meeting as host, is restrict the Chat function. This will restrict the chat function so only Hosts and Co-Hosts have the ability to send chats. All participants can see the chats that get sent. To restrict the chat function:

- From the Zoom meeting window, click on the Chat button on the lower toolbar to bring up the chat panel.
- In the chat panel, click on the ... button and select “Participants Can Chat With: No One” from the drop-down options.

Ideally you should have at least one Co-Host that is **not** the student to help manage participants. Most of this will take place using the manage Participants panel. Make sure you have this toggled on, by clicking Manage Participants in the bottom toolbar.

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- The PhD student and any panelists should be elevated to **Co-Hosts**, this will allow them to control their own webcams and mics as well as allowing them to use the chat function as needed. They will also have the ability to share their screen/present. The meeting Host can elevate any participant to Co-Host. (There is no limit to the number of Co-Hosts you can have.)
- During the meeting the Host and Co-Hosts can control participant video as needed, but it is useful to keep video on for relatively large meetings.
- Depending on if you are using chat at all or not, use either chat or a verbal announcement in the meeting to direct participants to use the Raise Hand function in the Participant panel to be recognized and unmuted, so they can speak to the group. Ideally this could be moderated by the student's mentor.
- In the event that a disruptive participant gets into your meeting, use the **Remove** function on the Participant panel to remove them from the meeting immediately.

At the defense

- Check in with the student and committee members before the defense begins. Let everyone know you will be in the virtual room at least 15 minutes before the scheduled start time and that you will check with each required participant to ensure that the audio and video are working effectively.
- The student's mentor will introduce the student to the audience, then the student will take over for the presentation, just as would happen in a live defense (this is also a final check that all the audio/visuals work).
- If bandwidth becomes an issue, you might suggest that people who are not required participants turn off their video except when they are speaking. **Remember that audio-only participation by committee members and the student is not permitted.**
- During the public question-and-answer period, have participants use the "hand raise" function to be recognized for questioning.

For the Student Defending

In advance of the defense

- Make sure you know how to use 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.

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- Students are encouraged to hold one or more practice defenses with a select group of friends, fellow students, or other close colleagues to rehearse the components of delivering a defense using Zoom.
- Share your 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.
- Check with your advisor about the process for you “stepping out” of the room during the committee’s discussion at the private defense.
- 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.
- Invite colleagues and friends. This is still a public event and still the apex of your graduate work. You may not be able to go out and celebrate, but having friends and colleagues present who can help you rehash all the highlights later will keep the defense from feeling anticlimactic.
- Be prepared for a possible system crash during the Zoom meeting and don’t panic if it happens - you should be able rejoin the meeting after a system reboot. Have contact information (voice, text, email) on hand for any co-hosts in case you need to inform them of the crash so that the co-host can notify other participants.

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, think about how you will emphasize or punctuate some of your main points in your delivery. 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).

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For Committee Members

All committee members are responsible for ensuring that they know how to use Zoom in advance of the defense. Do a test run, and consult with Zoom-support@ouhsc.edu if needed.

For all participants (including “public” participants)

- Don't multitask during the defense. We are all tempted to do this in the online environment, but this is not a regular online meeting. The student defending has spent years in anticipation of this event.
- Remember that there is often a little bit of lag time in sound on a video conference, so be particularly attentive to giving people time to respond and to not speak over people.
- Be sure that the place you are sitting avoids glare, shadows, or an overly cluttered backdrop.
- Use headphones, if possible, to reduce any potential background noise.
- Exaggerate your enthusiasm. What would be a positive nod in a face-to-face environment won't come through as clearly in the online environment.