# Guidelines for a Successful Zoom Thesis/Dissertation Defense



The thesis or dissertation defense has two parts: a presentation open to the public and a closed-door session restricted to the student, the advisory committee members, and (for PhD defenses) the outside examiner. When a defense must be conducted remotely, it is important that the public nature of the presentation and the private and interactive nature of the closed door session each be preserved. The following guidelines should be followed by Biology and Wildlife Department graduate students when scheduling and arranging a thesis/dissertation defense. Please note that these recommendations differ from those of the Graduate School.

## 1. The Public Defense

### 1.1 Schedule your public defense

The student should schedule the Zoom meeting and share the invitation link with the department for distribution to graduate students and faculty. The student may also choose to share the invitation link with targeted individuals outside the department (see below for instructions). However, students are strongly discouraged from sharing their meeting information widely on social media.

- Log in to Zoom https://zoom.us using your institutional (UAF) account.
- Edit your Settings prior to scheduling your meeting as follows. The **bold** items are related to security. Note that these settings will apply to all your meetings scheduled beyond this point, until you change your settings again, but will not apply retrospectively to meetings you already scheduled.
  - **Waiting room - on, but edit the waiting room options** as follows. Under "Who should go to a waiting room? choose "Users who are not in your account and not part of the allowed domains". Under "Who can admit participants from the waiting room? choose "Hosts and co-hosts".
    These guidelines automatically admit to the meeting:
    - People within the UA domain *who are currently logged into Zoom and who show up to the defense on time*
    And will send to the waiting room:
    - People who enter from outside the UA domain
    - People who enter from within the UA domain but are not logged in to Zoom
    - Anyone who shows up late to your defense
    You will need a co-host to manage the waiting room (see section 1.2).
  - **Password when scheduling new meetings - on**
  - **Embed passcode in invite for 1-click join - on**
  - Require Host Video and Participant Video - both on

- o Audio Type: Telephone and Computer Audio
- o Mute Participants Upon Entry: on
- o Chat: on
- o Sound notification when someone joins or leaves: off
- o Co-host: on (you probably can't change this)
- o **Screen Sharing: Host only**
- o **Annotation: off**

- Schedule your Zoom defense meeting
  - o Log in to Zoom https://zoom.us using your institutional (UAF) account.
  - o Under the Meetings tab, click Schedule a New Meeting.
  - o Use an automatically-generated meeting ID, rather than your personal meeting ID
  - o Require a password. If you've set your personal settings as recommended above, then the password will be embedded in the link.
  - o Choose to have the meeting recorded automatically to the web. That way you can't forget to start the recording when the defense starts. (Alternatively you can start and end the recording manually while in the meeting.)
  - o Click Save.
  - o The next screen will show you options for inviting others. Under the Invite Link, choose Copy the Invitation. Paste that invitation into an email to Pauline Thomas, pthomas10@alaska.edu. She will distribute the invitation when she announces your defense, and will send out calendar invitations.
  - o You may want to invite others outside the university and may do so by sending those individuals the link. Please ask your guests not to re-distribute the link for security purposes. Share the names of people you invite outside the domain with your co-host (see section 1.2), so they can admit them from the waiting room without asking you (e.g. in case they show up late).
  - o Ask your co-host and committee to please join the meeting at least 10 minutes early.

## 1.2. Appoint a co-host
Arrange in advance for a friend or faculty member to serve as a co-host. Ideally this will be someone does not need to pay close attention to your presentation (i.e. not a committee member). The co-host will deal with administrative details during the presentation. To enable the co-host, follow these instructions after initiating the meeting.

1. Click on Participants in the meeting controls at the bottom of the Zoom window

    This will open a list of participants on the right.
2. Hover over the name of the participant who you want to assign as co-host and choose More
3. Click Make Co-Host
4. To learn more about how to appoint a co-host, check here.

Once a participant has been made a co-host, they will have access to the [co-host meeting controls](#).

Among the co-host's responsibilities will be the following:
- Double-check the screen-sharing restrictions before the meeting begins (see 1.3 below)
- Mute noisy participants
- Monitor chat messages and respond if necessary
- Remove a disruptive participant if necessary by doing the following:
  - If the Participants panel is not visible, click "Participants" at the bottom of the Zoom window
  - Next to the participant you want to remove, click "More"
  - From the list that appears, click "Remove"

You are encouraged to practice with your co-host several days before the defense in order to ensure you are both familiar with the Zoom controls.

Note that the co-host cannot start the meeting. If you need someone else to start the meeting for you, you should appoint an "alternate host" during the meeting setup phase. To learn more about these roles, look [here](#).

The host and co-host should avoid locking the meeting, in order to allow late attendees to join.

## 1.3. Make sure others cannot control the screen

To avoid "Zoombombing", it is very important to prevent others from being able to take control of your screen. Make sure your Setting are correct (as specified in section 1.1) before you start the meeting. With respect to security, the items shown in bold in the Settings list (section 1.1) are particularly important: enable screen sharing for the host only, and disable annotation.

To double check that non-host screen control has been disabled once you have opened the meeting:
- Click the Share Screen icon at the bottom of the Zoom window.
- Choose Advanced Sharing Options
- Make sure the Who Can Share option reads Only Host.

## 1.4. Ending the meeting

When you've completed both the presentation and the question and answer session, close the meeting for everyone by clicking "Leave Meeting".

## 1.5. The Video Recording

If you set the meeting to record automatically, it will start the recording when the first person joins. If you wish to record the meeting manually, you can do that once you start the meeting by clicking Record from the lower screen panel. Recording will end when you manually stop it or when you end the meeting. If you chose to record to the cloud, you will be notified by email when the recording is available on the cloud for editing or download.

You may edit the playback range that people will see when they access the video, if you wish to remove chat before and after the defense. For instructions, check here: https://support.zoom.us/hc/en-us/articles/115003001383.

# 2. The Closed-Door Session

## 2.1. Scheduling the Closed Door Session

The closed-door portion of the defense may follow closely on the heels of the public presentation, but it should take place in a separate Zoom meeting. The graduate advisor, rather than the student, should schedule the closed door defense, invite the participants, and serve as the meeting host. This is important because the advisor will need to isolate the student during private faculty discussions. If unfamiliar with Zoom, the advisor should read through the following instructions before setting up the meeting.

## 2.2. Private Faculty Discussion

Typically during a defense the student is asked to "leave the room" early in the meeting and again after the question and answer session is complete. There are several ways to do this on Zoom, including the Breakout Room and the Waiting Room. The easiest way is to put the student in the Waiting Room:

- Before the meeting, go to https://zoom.us, choose My Account at top left, and login. Choose Settings from the menu on the left. Enable Waiting Room.
  - (To avoid making everyone enter the meeting through the waiting room, edit the Waiting Room Options so you force only users outside the UA domain to enter via the waiting room.)
- To send the student "out of the room" during the defense, click on Participants to open a list of participants to the right, hover over the student's name, choose More, and choose Send to Waiting Room. While in the waiting room student will not be able to hear conversation within the main meeting.
- Re-admit the student back to the main meeting when it's appropriate.

Consider whether you want to record the closed-door defense. If this is desired, click the Record button on the lower panel at the start of the meeting.

## 2.3. Enable Screen Sharing and Use of the White Board

The committee can ask the student to solve problems "at the board" during the Zoom defense if the meeting is set up properly in advance. Before the meeting, the advisor/host should change their account settings (https://zoom.us, login, choose Settings from the menu on the left) to enable the following options:

- Screen Sharing on - By All Participants
- Annotation on
- White Board on