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Debrief of Zoom remote defense
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My defense went very smoothly (no trolls or disruptions, and the presentation went smoothly), which is likely due to some of the control measures that we took in advance. I'll go through my procedure, all of my Zoom meeting settings and provide some recommendations.

Prior to the Defense (i.e. a month before)

A Zoom webinar would have been the best option, but that wasn't available, so I scheduled a regular meeting (see settings below).

I shared the meeting link, ID, and password on the advertisement that went to the various department lists via Martha, but I think that future defenses would actually do better to advertise entirely via registration form (see below).

I used a Google form as a registration form, using the option to always collect email addresses (which automatically adds a required field for email address to the top of the form). The other two questions I asked were:

1. Name (required)
2. Affiliation (optional)

On the top of the form I typed the date and time of the defense, and:

“To avoid disruption we are not sharing the updated link to the Zoom meeting online. Please register here and you will receive a link by email the day of the defense.”

I also unchecked the option to restrict to users in Stony brook University (because I designed the form with my SBU Gmail account). I allowed respondents to submit more than 1 response and edit after submit.

I used that form to advertise on social media.

The day of the defense (about 1.5 hrs prior to the start) I converted the responses to a spreadsheet, and then copied and pasted all of the emails from the appropriate column into an email which contained the link to the Zoom defense, as well as the meeting ID and password.

I did get a few automatic responses to that email, including from one person who typed his email in wrong (I figured that there was nothing I could do about that). If I had not had the Zoom link sent out on the announcement to the department, I would have also included the department listserv address on that email, just to make sure that everyone in the department got it. Before I sent the email I took a quick look through the responses to the registration form to check for any emails from suspicious sources or names.

Note that people were still registering right up until I started, so I also shared the form with my moderators, who could continue to communicate with new registrants.

When I started I had a prepared slide of instructions displayed to the audience that described what the user interface looked like, and how to edit the settings. The biggest concern was that some people new to Zoom (especially family members, etc) would not know how to move the video box out of the way of the rest of the slides in fullscreen mode. This also instructed people who were having issues to use the chat feature to communicate with moderators.

Moderators/Co-hosts

Probably the biggest safeguard was selecting 2-3 people who would be moderators. Once I started the meeting (about 30 minutes before the scheduled time) I admitted those people and made them co-hosts (I also needed to unmute them), from the participants list.

It was their job to monitor the chat and the list of participants, to look for any trolls or people having difficulty.

Prior to the defense we practiced together, so that they all knew where the controls were for:

- Muting and Unmuting others
- Moving people in and out of the waiting room
- Removing people

Probably their most active role, especially in the first few minutes, but continuing throughout, was admitting people from the waiting room who showed up late, or had computer issues and needed to reconnect.

They also continued to monitor the registration form up until I started, to send out the link to last-minute registrants.

Just Before the Start

About 30 minutes before the scheduled start, I started the meeting.

The recording began immediately, but I could **pause** it so that the initial 25 minutes or so did not get included.

My first task was to admit the moderators, and the members of my committee. I unmuted each of them, so that we could talk, and make sure that they could hear me, and see my slides (which I started sharing).

Important! There are several settings that should be checked once the meeting starts, such as making sure that participants can't unmute themselves.

As we neared the start, I had my chair, advisor, and moderators mute themselves – that way they could unmute themselves when they were going to do introductions, or if they needed to interrupt me to let me know that my connection was failing, etc.

During the Defense

I un-paused the recording just after I admitted everyone from the waiting room.

Then we did introductions and I started.

There are plenty of things happening behind the scenes once I got started, all being handled by the moderators.

Note that the chat can only be turned off completely prior to the meeting (though, the new security box might allow that to be changed...I didn't get a chance to experiment with that), and when someone decided to send a chat to me, the chat icon would blink and a little pop-up would show on the edge of my screen. I was OK with this, because I was working with two monitors – the main monitor showed Powerpoint's presenter view, from which I could look at my notes, and where my webcam was located, so that I was looking at the "audience" for the most part. I was sharing the second screen, which only showed my slides, and that's where all of the Zoom control bars and notifications were – so they weren't too distracting. I would recommend that anyone presenting try to do this with two screens, if possible, to avoid distraction.

Note that I had annotation turned off, so the only way to indicate things on my slides was to point with my cursor on the secondary screen that was being shared, which took a bit of practice.

Question session

My last slide was another set of instructions on how to ask questions.

We gave people two options: they could either use the "raise hand" option or type a question to one of the moderators.

This meant that I needed to open the chat window for myself, and the participants window. Note that when a participant chats with a co-host, only that co-host sees that text, so each co-host (me plus the three moderators) might get questions that way.

I took turns individually unmuting people who had "raised their hand", referring to them by name, so that they knew they were going to be unmuted to ask a question. The moderators could then "lower" their hands and unmute them after their questions were answered, if they didn't do that themselves.

Occasionally I would check with the moderators to see if there were any additional chat-questions, and if so, they would unmute themselves, and read it off.

Ending the Meeting

The only thing to be aware of here, is that there were lots of nice comments (well-wishes, etc) in the chats, but those are only saved if each co-host find the option to save their own chat history (the main host can't save them all automatically, and as soon as the meeting ends they disappear). I neglected to do this, so it makes sense to add that to a checklist.

You don't have to stop the recording (it will automatically stop when you end the meeting), but you can also do that once the questions are over.

The recording gets processed on the Zoom servers, and will show up in the hosts's online Zoom account (recordings tab) later.

Settings

The meeting was scheduled in advance with the following **meeting options** selected:

- Registration: unchecked (I opted to use a different form of registration – see below)
- Meeting ID: “Generate Automatically”
- Meeting Password: checked automatically by SBU settings
- Video
 - Host: on
 - Participant: off
- Enable join before host: unchecked
- Mute participants upon entry: checked
- Enable waiting room: checked
- Only authenticated users can join: unchecked
- Record the meeting automatically: checked (option selected: “in the cloud”)

It was necessary to change some of my account's settings prior to starting the meeting.
Relevant host settings:

- Join before host: off
- Use PMI when scheduling a meeting: off
- Only authenticated users can join meetings: off
- Only authenticated users can join meetings from Web client: on (note, I wasn't sure what this did, so I left it on)
- Embed password in meeting link for one-click join: on (I used this option to make it easier for members of the public – family, etc – who were new to using Zoom. Since I would be sending out the password with the link via my registration form anyway, I didn't think this would impact the security too much.)
- Chat: on
- Prevent participants from saving chat: off

- Private chat: off
- Auto saving chats: off (locked by admin)
- Play sound when participants join or leave: off
- File transfer: off (note: my internet connection causes the video to slow considerably when I send files over zoom, and since I wasn't planning on sending any files for the defense, I left this off)
- Co-host: on
- Always show meeting control toolbar: on
- Show Zoom windows during screen share: on (I'm not sure if this would have been better the other way – I didn't experiment too much with it).
- Screen sharing: on
 - Who can share: host only
- Disable desktop/screen share for users: on
- Annotation: off (I would have preferred to use this if only the host could do it, but I wasn't sure about that, so I turned it off)
- Whiteboard: off
- Remote control: off
- Nonverbal feedback: on
- Allow removed participants to rejoin: off
- Breakout room: off
- Closed captioning: off
- Virtual background: on (I considered turning this off, but didn't want to limit people like my chair or advisor – who might like to be seen – from customizing the space behind them. I figured the moderators could deal with anyone who turned their video on and used the background to display offensive material)
- Waiting room: on
 - Which participants to place in waiting room: all participants
- Show a “join from browser” link: on
- Email notification
 - When a cloud recording is available: on

I think that those were the only settings that mattered (all others were probably still on defaults).