

Guidelines for Units Conducting Hybrid or Remote Oral Defences

Updated August 19th 2022

With the resumption of activities on campus, Units should focus on organizing **in-person oral defences** to mark the final milestone in their doctoral students' degree. Hybrid and remote alternatives remain available. Units are not permitted to record or livestream a defence.

These guidelines are designed to assist Units when setting up remote and hybrid defences. This document contains the following sections:

- [Setting up your Zoom Account prior to Scheduling a Defence](#)
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- [Hosting a Zoom Session](#)
- [Hosting a Hybrid Defence](#)
- [Livestreaming / Recording a Defence](#)
- [Audience Participation](#)
- [Health and Safety Considerations for Hybrid Defences](#)
- [Technical support](#)

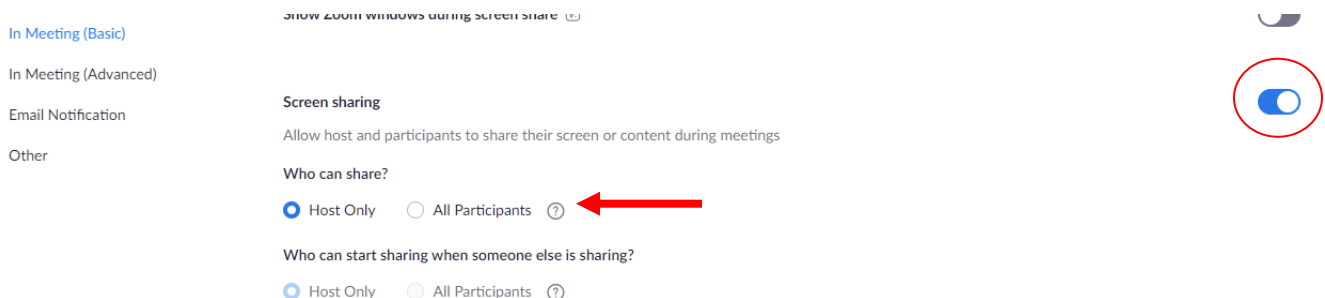
Setting up your Zoom Account prior to Scheduling a Defence

The Unit is responsible for setting up the Zoom link and managing the Zoom Account for a hybrid or fully remote defence. A licensed Zoom Pro account is required for hybrid and remote defences.

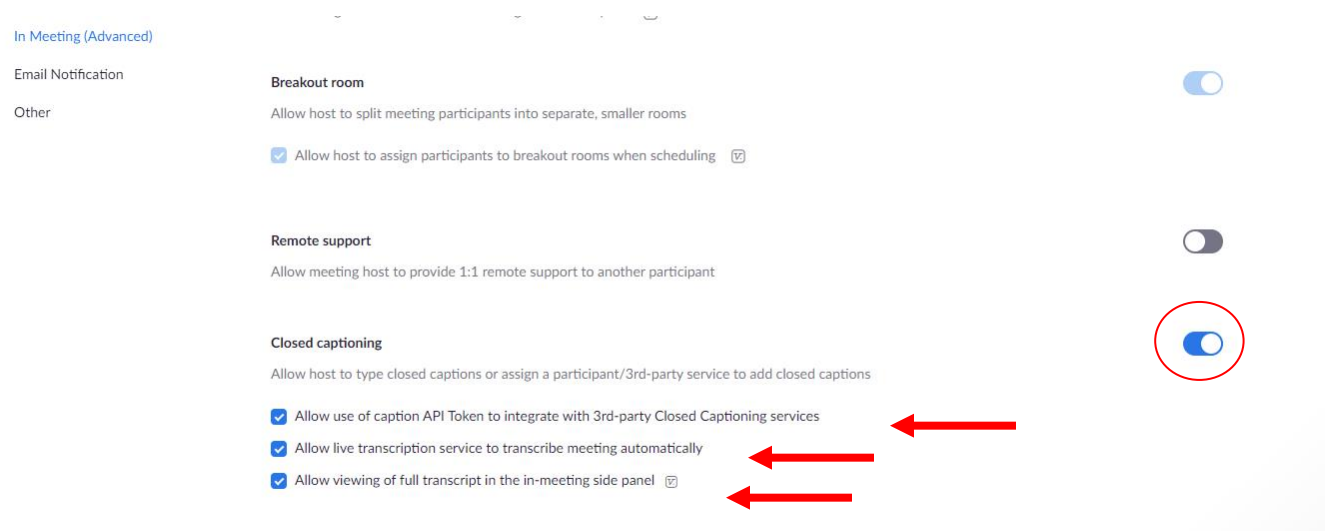
Prior to creating the Zoom link for a defence, we recommend verifying and if necessary, activating certain features with your Licensed Pro Zoom account that will be used for hosting defences:

- 1) **Use a web browser** to log into the selected Zoom account used for the defence: <https://zoom.us/>
- 2) Enter your McGill domain and credentials
- 3) Go to Settings to activate screensharing and/or closed captioning. These settings will remain active unless you choose to deactivate them in the future.

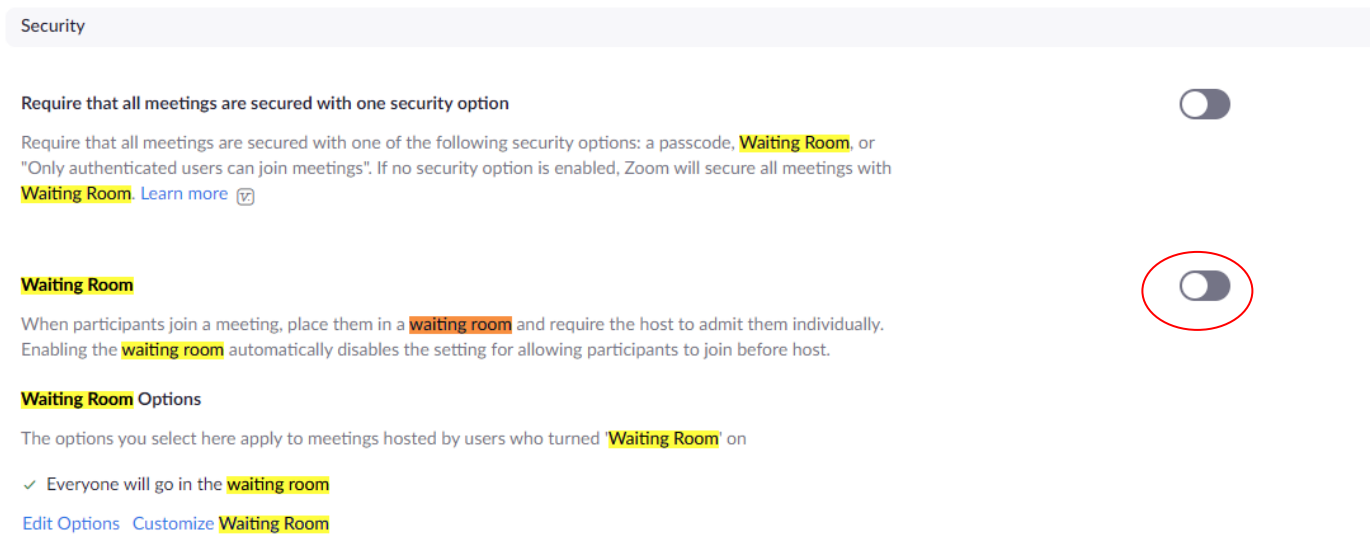
To activate screensharing for all attendees, go to 'In Meeting (Basic)', then Screen Sharing. Activate the blue toggle. Select All Participants:



To enable closed captioning, go to ‘In Meeting (Advanced)’, then Closed Captioning. Activate the blue toggle. Select all three options:



To activate the waiting room so that attendees need to be admitted individually to the meeting, go to ‘Security’:



4) Once the Settings above are confirmed in the browser, use your Zoom desktop application to create the Zoom defence meeting. At this point in time, you can enable/disable the passcode option, and choose an alternative host.

To enable the passcode: When scheduling a meeting, most Zoom accounts at McGill have the Passcode option pre-selected for security reasons. However, it is not required to set up meetings with a passcode.

Should you choose to keep this feature, please ensure that all attendees and the Thesis Office are informed of the passcode. There is space in the Oral Defence form where this passcode can be entered.

Schedule Meeting

Topic: Chloe Garcia, Dr.'s Zoom Meeting

Start: Thu, November 25, 2021 02:00 PM

Duration: 1 hour 0 minute

Recurring meeting Time Zone: Eastern Time (US and Canada)

Meeting ID

Generate Automatically Personal Meeting ID 467 347 6844

Security

Passcode 938550
Only users who have the invite link or passcode can join the meeting

Waiting Room
Only users admitted by the host can join the meeting

Only authenticated users can join

Video

Host: On Off Participants: On Off

Audio

Telephone Computer Audio Telephone and Computer Audio

Dial in from Canada and United States: Edit

Calendar

Outlook Other Calendars

To enable an alternative host: If you are a GPC setting up the Zoom defence, but the supervisor or Chair will act as the Zoom host during the defence, the alternative host can be selected at the time the meeting is set up, by clicking “Schedule Meeting”, then opening “Advanced Options”:

Schedule meeting

Security

Passcode 770110
Only users who have the invite link or passcode can join the meeting

Waiting Room
Only users admitted by the host can join the meeting

Only authenticated users can join

Video

Host: On Off Participants: On Off

Audio

Telephone Computer Audio Telephone and Computer Audio

Dial in from Canada and United States: Edit

Calendar

Outlook Other Calendars

Advanced Options

Allow participants to join anytime

Mute participants upon entry

Automatically record meeting

Approve or block entry for users from specific countries/regions

Alternative hosts:

jjj@mcgill.ca

Allow alternative hosts to add or edit polls

Interpretation

Enable language interpretation

Save Cancel

Sharing the Zoom Link

The hyperlink for the defence must be shared with GPS at the time of the Oral Defence Form submission. It should be a clickable hyperlink. Alternatively, you can provide the Meeting ID and passcode. If the Oral Defence form is a photocopy, then the GPC must provide the clickable link by email to the Thesis Office. The clickable Zoom hyperlink and the passcode (if necessary) should be shared with the committee members and the student in a timely manner as well.

Hosting a Zoom Session

It is recommended that the Academic Unit representative (Chair or delegate) act as Zoom host for a remote or hybrid defence. Only a member of the oral defence committee should be the Zoom host. Hosting responsibilities include:

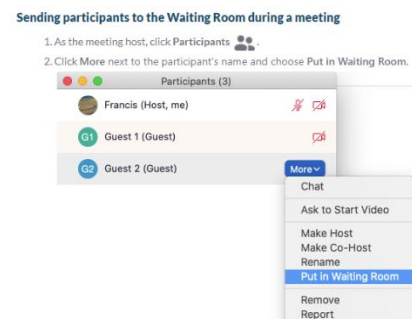
- ➔ Letting remote attendees into the meeting.
 - We recommend starting the Zoom meeting at least 10 minutes prior to the scheduled start time so that parties have time to log in. If your waiting room is activated, you can admit them earlier or on time.
 - The defence should only start when all participants attending remotely are present.
 - **Recommended:**
 - Committee members should share their phone numbers and emails in the Zoom chat in case they get disconnected and need to be reached through alternative means, and for the Pro-Dean to be able to reach them after the defence (if needed).

- ➔ Explaining the parameters of the defence:
 - With fully remote defences, the student, the Pro-Dean, and the committee members should be on the Zoom call.
 - Student should have camera and audio activated at all times.
 - Committee members should mute themselves during the student's presentation.
 - Committee members should keep their video on but can turn it off if there are bandwidth issues.

- ➔ Working out technical aspects of the meeting
 - **On Zoom:** This can mean adding closed captioning or ensuring someone is unmuted while talking.
 - **In the hybrid context:** The Zoom host should manage the Zoom attendees, ensure they can see and hear the student presentation, and position them appropriately during the question period (e.g., turning laptop to face the student when the Zoom attendee is asking them a question).

- ➔ Communicating with IT ([for technical assistance](#)) or thesis.gps@mcgill.ca when there are technical issues preventing or affecting the oral defence proceedings.

- ➔ Putting the student into the waiting room for the pre-defence meeting and for deliberations. The student should be brought back (“Admitted”) into the meeting for the examination and after the final decision has been made. To put someone in a waiting room, see image to the right.



Once the defence is ready to start, the Pro-Dean will act as the academic lead and oversee the proceedings.

Hosting a Hybrid Defence

If a defence is hybrid, Units should ensure that they indicate both the Zoom link and the room number in the Oral Defence form. This information should also be shared with committee members and the student in a timely manner.

There are various formats possible, including:

- ➔ The committee and student are in person, but the Pro-Dean attends remotely.
- ➔ The student is remote, but the committee is in person.
- ➔ Some members of the committee are remote; the student and other members are in person.

The setup of a room can be decided by the Unit and student, depending on who is present and remote. McGill's IT Services have created [guidelines for hybrid meetings](#) that may be useful.

Tips for hosting a hybrid defence

- ➔ Equipping the student with their own microphone
- ➔ Selecting a room that does not have too much of an echo
- ➔ If the student is presenting in person, with one or more committee members on Zoom:
 - having one laptop set up for the student, on which they are projecting their presentation in the physical space and are simultaneously logged into the Zoom meeting, sharing their screen.
 - seating committee members at the front of the room, with one additional laptop controlled by the Zoom host. This laptop can be placed at the extremity of the row, facing the committee members and the student.
- ➔ Keeping a rotating microphone: If there are more than one person physically present and logged into a Zoom meeting, only one screen should be unmuted at a time (based on the speaker). If all attendees logging into the Zoom session remain unmuted, there will be an echo in the room.

Livestreaming / Recording a Defence

Please note that in order to preserve the integrity of the defence, the recording or livestreaming of Zoom defences is not permitted. Audience participation is possible on campus or on Zoom (with Chair approval).

- Livestreaming can distract the host/committee member from focusing on the student's presentation and the discussion.
- There are a number of technical issues that can happen with livestreaming (e.g., YouTube and Zoom not connecting, lack of connectivity), which risk affecting defence proceedings and can further impact the integrity of the defence.
- Confidentiality and consent: Not everyone on the Zoom call may be comfortable with livestreaming, and the consent of all parties is required. There is also a risk that the confidential parts of the defence may be accidentally disseminated online.

Audience participation

Audiences may be invited to in-person defences. In the case of remote and hybrid defences, we do not recommend adding more than 5 guests to a Zoom call. The Zoom host needs to agree to host an audience prior to confirming with the student, as it can be difficult to manage attendees (i.e., with cases where people need to be muted, if the chat is active, when the pre- and post-defence sessions require that

audience members be put into a waiting room).

If the student would like to have a larger audience for their remote defence, the following option is also available provided the Unit and the Pro-Dean agree: An additional audience member can be added to the Zoom meeting for the public portion of the defence. This person must be a faculty member (e.g., a co-supervisor) who would be physically present in a room on campus, projecting their screen to a room for peers and faculty members who wish to watch the defence. The Zoom host must ensure that the audience member is excluded from the pre-defence and deliberation sessions.

Health and Safety Considerations for Hybrid Defences

All defences with an in-person component must comply with all [applicable health and safety guidelines of the University](#) at the time of the defence.

Technical support

For further assistance on using Zoom or for technical support, we encourage Units to reach out to the appropriate contact persons and resources:

- For assistance with Zoom: <https://support.zoom.us/hc/en-us/articles/206175806>
- For assistance with McGill Zoom or technical support with campus-related materials and networks: <https://www.mcgill.ca/it/>
- McGill IT [guidelines for hybrid meetings](#)
- For general oral defence related questions, you can contact the Thesis Office at thesis.gps@mcgill.ca