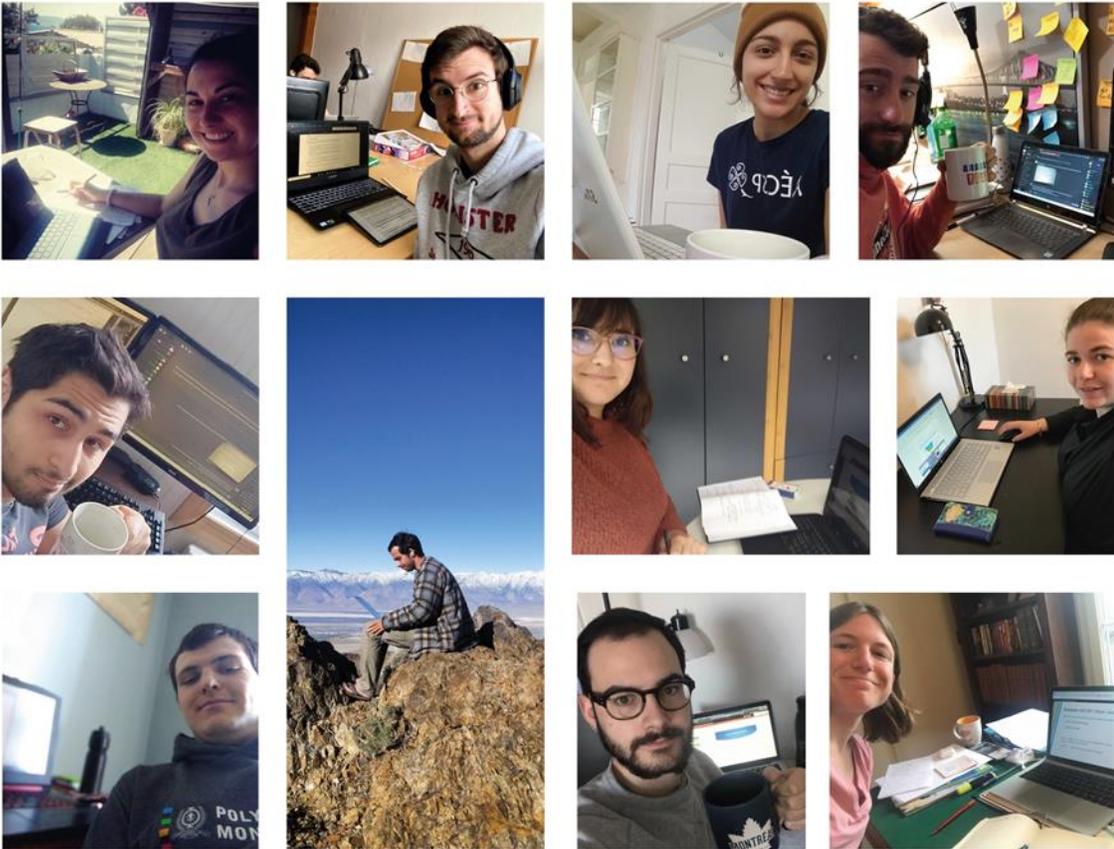


## Guide for the Conduct of Dissertation Presentations and Thesis Defences via Video Conferencing



### References:

These recommendations and suggestions have been adapted from a similar guide produced by the *Faculté des études postdoctorales* at the *Université Laval*.

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### User guides:

Via: <https://assistance.sviesolutions.com/wp-content/uploads/User-Guide-Via-8.7-Collaborative-Interface.pdf>

WebexMeetings: <https://help.webex.com/en-us/mswr2eb/Schedule-a-Cisco-Webex-Meeting-in-Modern-View>

## A. General Guidelines

In order to respect health and safety measures implemented by the Government of Québec due to the Covid-19 pandemic, neither jury members nor students are required to be on campus for thesis or dissertation presentations and defences until further notice. Therefore, all presentations and defences must be held by video conference.

To offer favourable, fair, and safe conditions for all Polytechnique Montréal students, the *Direction de la Formation et de la Recherche* and the *Direction des études supérieures* have developed a guide for the conduct of thesis or dissertation presentations and defences by videoconference.

The *Direction des études supérieures* recommends that dissertation presentations and thesis defences be held on the WebexMeetings Pro or Via platforms, which are online platforms approved by Polytechnique Montréal's *Services Informatiques* (IT Department).

If and when new platforms are accepted by the University Executive and *Services Informatiques*, students will be informed.

However, if jury members wish to use another platform, they must guarantee technical support and ensure that various confidentiality measures are respected. In this scenario, jury members will also have to transmit, to all those involved in the presentation or defence, all information they deem necessary for the smooth running of the remote dissertation presentation defence.

## B. Before the Presentation or Defence

### a) The Invitation

As soon as the Jury Chair has provided their consent to proceed with the dissertation presentation or defence (after having received and read jury members' reports), then the *Agent de département* and the student will work together to schedule the presentation or defence remotely via [Webex Meetings Pro](#)<sup>1</sup> or [Via](#)<sup>2</sup>.

If difficulties are encountered, the *Direction des études supérieures* (etudes.superieures@polymtl.ca) can provide assistance in terms of scheduling the remote defence.

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<sup>1</sup> Should this not be the case, please contact: [compte.creation@polymtl.ca](mailto:compte.creation@polymtl.ca) or [si-sac@polymtl.ca](mailto:si-sac@polymtl.ca) to get an account that will enable you to create meetings.

<sup>2</sup> <https://www.polymtl.ca/si/audiovisuel/web-collaboration>

It is the *Agent de département*'s responsibility to ensure that all jury members are aware that the presentation or defence will take place using online platform.

*Direction des études supérieures* recommends the student provide jury members with an electronic copy of their presentation in advance, with each page numbered.

The *Direction des études supérieures* recommends that the Jury Chair be accompanied by a member of the *Service Audiovisuel* team in order to:

- Share the screen
- Manage the discussion or chat
- Create a breakout room to enable jury members to deliberate “behind closed doors”

**Note:** All of the above features are accessible in VIA.

In terms of Webex Meetings Pro, the above technical developments are on-going, including the Breakout Rooms feature, specific to Webex Training. CISCO is attempting to deploy this feature in Webex Meetings Pro circa September 2020.

## b) The General Public

Industrial partners, family members, friends, and the wider Polytechnique community will be able to attend the dissertation presentation or defence.

However, there should not be more than **20 guests**, in order to reduce potential interference caused by too many connections.

The student must have the agreement of the Jury Chair as to the number of guests.

It is the student's responsibility to share the connection link with their entourage (family, friends, classmates, etc.).

The general public (guests) must log in at least ten (10) minutes before the presentation or defence begins. With respect to students themselves and jury members, no connections will be accepted after the presentation or defence has begun.

## c) Technical Verifications

To ensure the secure use of the virtual space created for the presentation or defence, the *Direction des études supérieures* recommends the following best practices:

- Activate the waiting room feature, and control screen sharing
- Disable file transfers
- Prohibit participants from recording the proceedings
- Select security options when prompted

- Prevent new participants from joining an in-progress meeting
- Be able to remove a participant if needed

**Note:** The [Waiting Room](#)<sup>3</sup> feature is part of the Webex Meetings Personal Room program.

Waiting Rooms for Webex Meetings Pro will be available in mid-August 2020.

The *Direction des études supérieures* strongly recommends that technical rehearsals be held at least two (2) days prior to the presentation or defence to enable the student to:

- Test their computer to ensure it supports the applications
- Test the stability of their Internet connection
- Test their computer's microphones, speakers, and camera
- Upload and host a PowerPoint presentation

The *Direction des études supérieures* recommends using a wired connection rather than a Wi-Fi connection. Do not use a smartphone connection for a thesis or dissertation presentation or defence.

Students must undertake the necessary precautions to ensure that the online presentation or defence is carried out in a rigorous manner, in compliance with the protocol provided.

Therefore, the student presenting or defending their thesis must agree to be alone in the room where they are connected to the presentation or defence.

If the student does not have the equipment required (camera, headset, high-speed Internet connection, ethernet cable) to carry out their remote presentation or defence, they may request access to a small room on-campus at Polytechnique with the required equipment, where they can undertake their presentation or defence alone (a member of the *Services audiovisuel* may assist in a technical equipment capacity). To request an equipped room on campus, the student must obtain written authorization from their supervisor. Jury members and the general public will remain at a distance.

In the above scenario, it is the student's responsibility to contact the *Agent aux dossiers étudiants* to reserve an appropriate room, to agree on all logistics, and to be registered on the Polytechnique premises access list.

Prior to physically arriving on campus, the student must have completed **the mandatory online training course, available on Moodle**.

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<sup>3</sup> <https://help.webex.com/fr-fr/nkwla4s/Set-Personal-Room-Preferences-in-Modern-View-in-Cisco-Webex-Meetingss>

In addition to the above training course, the student should refer to the PolyVirtuel web page at: <https://www.polymtl.ca/polyvirtuel/acces>, and acquaint themselves with campus access guidelines in the pandemic context.

### **C. During the Presentation or Defence**

During the presentation or defence, the Jury Chair (or designated leader) is responsible for sharing the online electronic link with both the student and jury members. **It is not the student's responsibility to establish the online electronic link.**

Due to confidentiality concerns, the Jury Chair must remind the student at the beginning of the meeting that it **is strictly forbidden** in any way whatsoever to record video or audio during the presentation or defence.

To reduce potential interference, guests are required to disable their microphones and cameras during the presentation or defence. Camera and microphone deactivation may be programmed in advance by the Jury Chair, or by a member of the *Services audiovisuel* team.

Guest microphones and cameras may be reactivated, one at a time, only when the Jury Chair invites the public to ask questions.

#### **In case of technical failure:**

The *Direction des études supérieures* will request assistance from a *Services audiovisuel* team member should any technical failure or issue occur.

However, if the technical environment does not permit the presentation or defence to occur in optimal conditions, jury members may decide to suspend the oral examination.

Interruption and postponement of the presentation or defence can only occur in the following situations:

- It is impossible for the student to be heard by jury members
- If the student's or jury member's Internet connection is interrupted and cannot be re-established within a reasonable period of time
- If, after several attempts, Internet connection cannot be re-established in a stable and durable manner
- If technical failures cause a delay in the presentation or defence

## **D. Deliberation**

Once the student's presentation has been completed and the jury has posed its questions, the Jury Chair will verify that the student and any guests have disconnected and/or are waiting in another virtual room (with microphones and cameras off) for the duration of the deliberations.

The deliberation must absolutely be held **behind closed doors** between jury members, and without the presence of the student or guests.

**It is strictly forbidden to record exchanges during the deliberation.**

The *Direction des études supérieures* recommends that the Jury Chair be assisted by a *Services audiovisuel* team member to ensure that deliberations are conducted in accordance with confidentiality guidelines, and to ensure that the general public and the student are in a virtual waiting room.

In the event that the student is disconnected during the deliberation, the Jury Chair can invite the student to rejoin the meeting.

## **E. After the Presentation or Defence**

Guests will be allowed to re-open cameras and microphones only after the jury has deliberated behind closed doors, and rendered its verdict in the student's presence. A short exchange (10-15 minutes) with the student may be permitted at this time.

## **F. Appendix**

a) Role of the Jury Chair:

### ***Prior to the presentation or defence***

- Authorize the presentation or defence, following receipt of jury members' reports
- Verify with the *Agent aux dossiers* that remote connection invitations have been sent to jury members
- Recommend (with the student, and their supervisor) that a virtual "test" meeting be organized to verify equipment and materials

### ***During the presentation or defence***

- Provide online electronic link
- Remind guests that it is strictly forbidden to film or record the presentation or defence (video and audio)

- Invite guests to turn off their microphones and cameras during the presentation or defence, and during the jury members' question period
- Prohibit late connections to the event

### ***Deliberation***

- Sequester the student and the guests in a separate virtual room
- Ensure that the deliberation takes place behind closed doors

### ***After the deliberation***

- Invite the student and the general public to rejoin the main virtual room

### **b) Special Features - Webex**

Webex offers three meeting types: Webex Meetings (Pro and Personal Room), Webex Training, and Webex Events. There are shared functionalities across these meeting types, as well as functionalities specific to each one.

### ***Room Creation***

- The creation of Breakout Rooms is a specific feature of Webex Training
- When scheduling a meeting, type of meeting can be selected

**Note:** The Breakout Rooms option will also be available for Webex Meetings Pro (tentative roll-out date: September 2020).

### ***Activating the Waiting Room and screen sharing control***

- The Waiting Room is a specific feature of Webex Meetings Personal Room.
- The Waiting Room is already configured in all Personal Room meetings.

**Note:** Cisco has announced that the Waiting Room option will also be available for Webex Meetings Pro (tentative production date: August 2020).

### ***Webex Meetings Pro meeting***

- There is no Waiting Room feature
- Once the meeting has started, the host can lock the meeting
- If the meeting is locked, no new participants (authenticated or non-authenticated) can be accepted into the meeting.

### ***Webex Meeting Personal Room***

- If the meeting has not been started: all participants remain in the Waiting Room
- If the meeting has already started: authenticated participants (those with a Webex account in the polymtl.ca domain) will be able to access the meeting without going through the Waiting Room. Non-authenticated participants will remain in the Waiting Room, the meeting host will be notified, and will permit access
- If the meeting is locked: all participants who have not yet entered the meeting remain in the Waiting Room until they are accepted by the meeting host.

**Note:** The Personal Room can be configured to lock automatically. If this option is used, the host will need to use the Webex Meetings Desktop application to provide access to attendees.

For more information about changing Personal Room preferences refer to: <https://help.webex.com/en-us/nkwla4s/Set-Personal-Room-Preferences-in-Modern-View-in-Cisco-Webex-Meetings>

### **To prohibit new participants (latecomers) from joining the meeting in progress**

Lock the meeting using the More Options icon > Lock Meeting Attendee Privileges

OR

from the Meeting menu > Lock Meeting.

- **Webex Meetings Pro meeting:** If the meeting is locked, no new participants (authenticated or non-authenticated) can join the meeting.
- **Webex Meetings Personal Room:** If the meeting is locked, all participants who have not yet entered the meeting remain in the Waiting Room until accepted by the host.