

2020 Assessment Institute Moderator Instructions for Concurrent Sessions

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ROLE OF THE MODERATOR FOR CONCURRENT SESSIONS

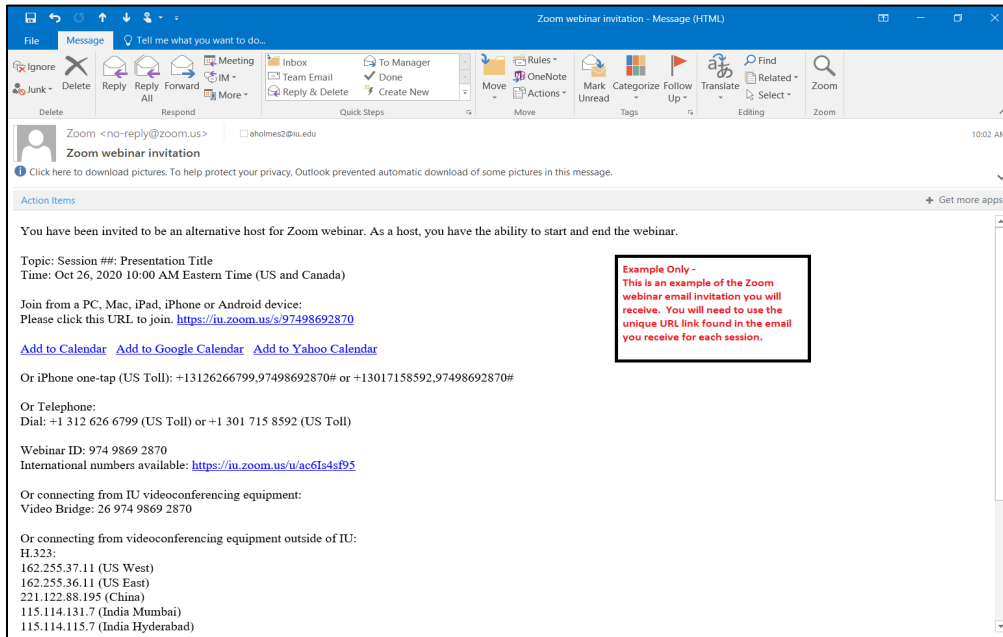
As a Moderator, you play a crucial leadership role in ensuring a successful session for presenters and a positive experience for attendees. You will be representing the Assessment Institute to several hundred institutions from around the globe. The concurrent session presenters will greatly benefit from your assistance. To help presenters provide a professional session, we are counting on you as a vital member of our team to not only connect with the presenter(s) throughout September and October to discuss the development and organization of the session, but to also follow the Moderator instructions outlined below.

ZOOM WEBINAR SESSION

The virtual Zoom Webinar sessions will allow up to 500 attendees. Each session will be recorded and placed on the Assessment Institute website for attendees to view at a later date. Attendees are not able to speak in a webinar, but will have the ability to interact using Zoom Q&A and Chat. The Zoom Webinar sessions are designed so the Presenter/Panelists can share their video, audio, and screen with the Institute attendees. A Zoom Webinar does not allow for breakout rooms. During your session, Presenter/Panelists and Moderator will only be able to see each other. The Webinar will be set to speaker view, which will allow the attendees to only see the presenter who is speaking. We recommend the co-presenters mute themselves until it is time for them to speak.

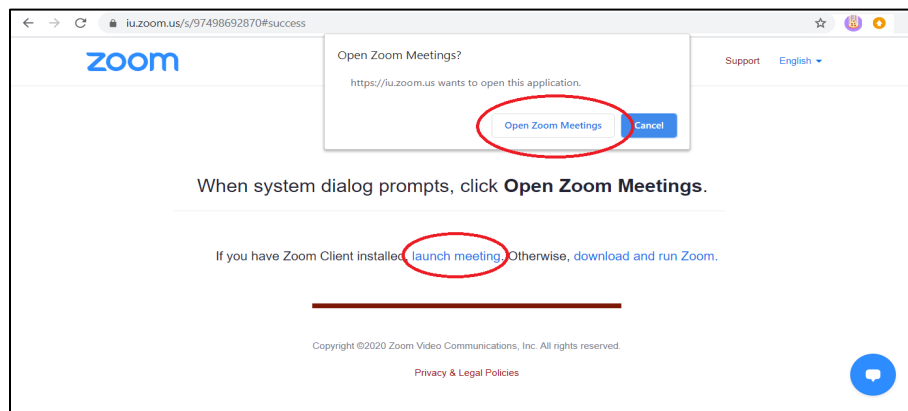
ZOOM WEBINAR INVITATION EMAIL

Depending on your Moderator level, you will either receive a computer generated Zoom Webinar email invitation to be an Alternative Host or a Panelist for each session you will moderate. In each email, you will find a **unique link** that you will need to use to log into the session as a Moderator. **We strongly suggest adding all invitations to your Outlook calendar. Please note: do not use the link provided to all attendees.**

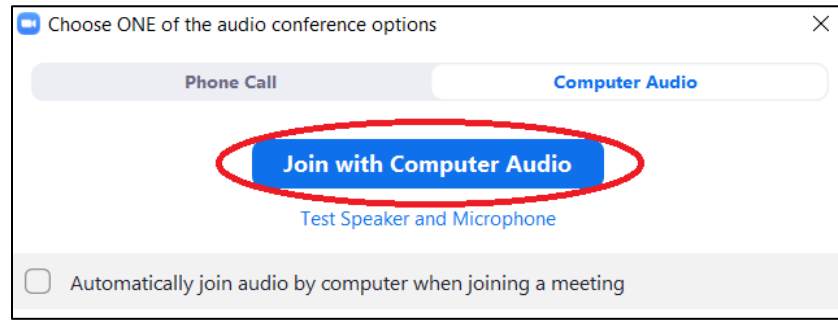


LAUNCHING THE ZOOM WEBINAR SESSION

To join the Zoom Webinar session you will be moderating, please click on the URL you received in the computer generated Zoom Webinar email invitation for that session. After clicking on the URL in the invitation email, you will be taken to a new browser window where you will be able to open or launch the Zoom session by either clicking on *Open Zoom Meetings* option or clicking on the *launch meeting* option.



After opening or launching the Zoom session, you will be asked to choose one of the audio conference options. Please click on *Join with Computer Audio*.



INSTITUTE ORGANIZER AND MODERATOR SESSION INSTRUCTIONS

Joining the Webinar Session:

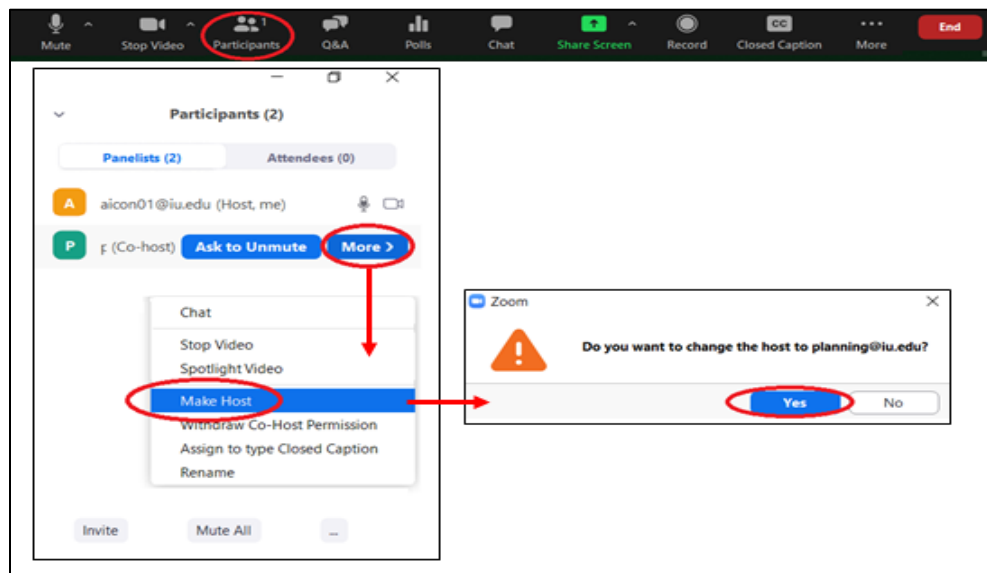
You will need to log into each webinar session you are moderating 15-minutes before the start of each session using the unique URL provided to you in your Zoom Webinar invitation email. The 15-minutes before the start of the webinar will be a *practice mode* for you to meet with the Institute Organizer who will set-up the webinar session and then transfer Host duties to you. During the practice mode you will be able to speak with the presenters, verify your role, and allow the presenters to practice and get familiar with the Zoom room. You will know you are in the *practice mode* because there will be a bright orange practice mode banner at the top of your Zoom screen. **IMPORTANT: DO NOT click on the Broadcast button until all presenters have joined the session, practiced, and are ready to begin their session.** Once this button has been clicked on, the session will be live to all attendees. You cannot stop broadcasting the session if you accidentally click this button.



Session Practice Mode:

During the practice mode the Moderator will be able speak with an Institute organizer while he/she sets up the Zoom Webinar session, speak with the presenters, and allow the presenters to practice and get familiar with the Zoom room. We have asked the presenters to join their webinar session 10-minutes before their session. **If for some reason a Presenter/Panelist or Moderator joins the meeting before the Institute Organizer, they will be listed as the Host. IMPORTANT: If this happens, that person will need to make the Institute Organizer the Host after the Institute Organizer logs in.**

To transfer the Host designation, the current Host will need to click on the *Participants* tab at the bottom of their screen. This will bring up the *Participant* window on the right hand side of their screen. In the *Participant* window there will be tabs for *Panelists* and *Attendees*. The current Host will need to click on the *Panelist* tab, hover over the *Institute Organizer's* name, and then click on the *More* button. Next, they will need to click on the option to *make the Institute Organizer the Host*. This will give the Institute Organizer control of the meeting temporarily. After the Institute Organizer is finished setting up the webinar, the Host designation will be transferred to the Moderator, which will give them control of the meeting.

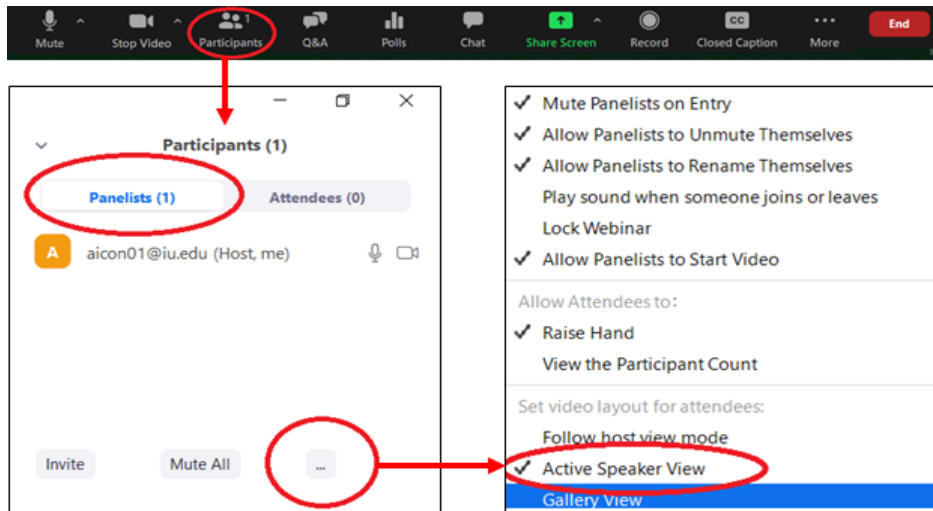


Webinar Room Set-Up for “Institute Organizer” in Practice Mode:

There will be an Institute Organizer assigned to set-up each Zoom Webinar concurrent session in Practice Mode. The Institute Organizer will receive an invitation email to be an Alternate Host with a **unique** URL to log into the session. This will designate you as the Host of the Zoom Webinar Session, allowing you to complete the steps below before making the Moderator the Host. In some cases, the Institute Organizer will be assigned both the Organizer role and the Moderator role. In this instance, you should follow the steps for both roles outlined in this document.

Institute Organizer, please do the following when you log in:

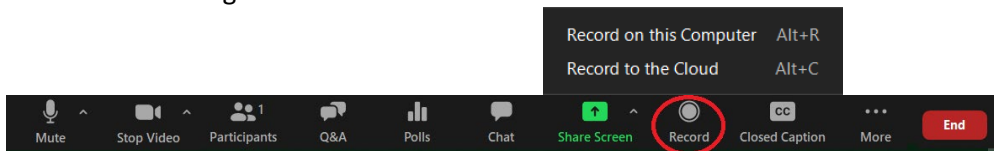
- 1) Introduce yourself to the Moderator and Presenters letting them know what your role as Institute Organizer will be and allow them to practice their session and familiarize themselves with the Zoom room.
- 2) Click on the *Participants* tab at the bottom of the screen. This will bring up the *Participant* window on the right hand side of your screen. Under the *Participant* window you will see a tab for the *Panelists/Presenters* and a tab for *Attendees*.
- 3) Click on the *Panelist* tab. The *Panelist* tab will list all of the Panelists/Presenters, and yourself as the Host/Moderator.
- 4) Click on the 3 dots on the bottom right of the participant box (if you have a MAC instead of 3 dots you will see the word ‘More’)
- 5) Choose list of options
- 6) Choose Active Speaker View (this will create a check mark by active speaker view). By clicking this option, the attendees will only see the person that is speaking during the session. However, you and the presenters will be able to see each other during the entire session. After your introductions, you must mute yourself when you are not speaking.
- 7) Exit out of the *Participant* window to make it disappear by clicking X.



- 8) The webinar has been set to record. Please look in the upper left hand corner of your Zoom screen to make sure the recording red light indicator appears immediately after you begin broadcasting. **Please do not stop recording.**



If for some reason the recording indicator image does not appear on your screen, you will need to manually set the session to record by going to the bottom of your screen and clicking on the *Record* button. This will prompt you to click either *Record to this Computer* or *Record to the Cloud*. **Choose Record to the Cloud.** By clicking *Record to the Cloud*, the *Recording* tab will appear in the upper left hand corner of you Zoom screen letting you know the session is being recorded.



- 9) Transfer Host duties to the session Moderator. You will need to click on the *Participants* tab at the bottom of your screen. This will bring up the *Participant* window on the right hand side of your screen. In the *Participant* window there will be tabs for *Panelists* and *Attendees*. Click on the *Panelist* tab and hover over the Moderator's name and then click on the *More* button. After clicking on the *More* button, you will need to click on the option to *make the Moderator the Host*. This will give the Moderator control of the meeting. See an illustration in the [Session Practice Mode](#) section of this document.
- 10) Explain to the Moderator how to broadcast the session when the session is scheduled to begin. To begin the session, the Moderator/Host should look for the bright orange banner at the top of the Zoom room and click on *Broadcast* button; this will BEGIN THE SESSION. **Advise the Moderator NOT to click on the Broadcast button until all presenters have joined the session, practiced, and are ready to begin their session.** Once this button has been clicked on, the session will be live to all attendees. You cannot stop broadcasting the session if you accidentally click this button. (See [Beginning the Session](#) for Moderators).

- 11) After you have transferred the Host duties to the Moderator, the Presenter/Panelist and Moderator/Host feel comfortable to begin the session, and the Moderator understands how to broadcast their session live, you may exit the session by choosing the **LEAVE MEETING** tab. **To leave the meeting you will need to click on the box in the lower left that says “END” then choose the option Leave Meeting.** IMPORTANT: **DO NOT** choose End the Meeting for All. This will end the Zoom Webinar session completely and you cannot restart the session.

- 12) If you are an Institute Organizer **and** a Moderator for the session, please continue to the next steps for Moderators.

Moderator Instructions in Practice Mode:

Use this time to introduce yourself to the presenter(s), letting them know what your role as Moderator will be, and allow them to practice their session and familiarize themselves with the Zoom room. Note: Please make sure the Institute Organizer has made you the Host in Practice Mode before he leaves the Zoom session.

Things the Moderator Needs to Discuss with the Presenter(s) during Practice Mode:

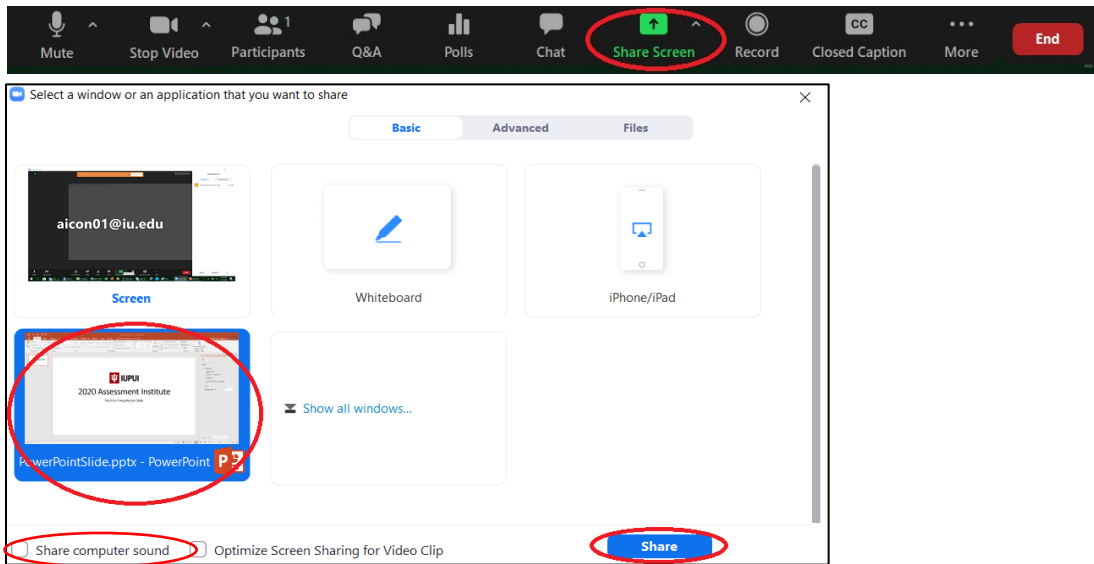
- 1) The Moderator will need to be ready to explain to presenters about the location of the “share screen” and “Q&A” tabs and how to use them.

Have the presenter be ready to share their screen after introductions. Please suggest to the presenter(s) that they close any unnecessary windows on their desktop. They should only have open the documents they plan to share during their presentation.

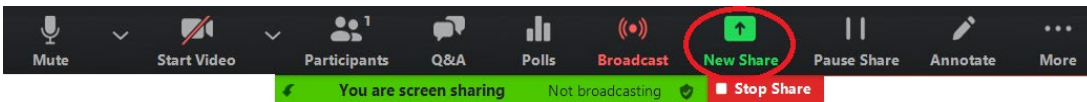
Have presenters go through the steps to share a document, switch to a new shared document, and stop sharing their screen.

First, have them open the document to their desktop. Then in Zoom, have them click on the *Share Screen* button located at the bottom of their screen. Next, Zoom will display available options from their desktop; they will need to select the document they want to share, and if it also contains audio, they will need to click on the box in the lower left that says “Share Computer Sound.” Finally, they should click on the *Share* button. This should bring their document up on the screen for everyone to see.

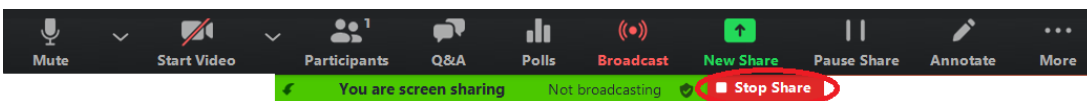
Note: if the “Share Computer Sound” option is not available on your screen, your Moderator will need to make the person sharing the screen with sound a Co-Host.



Presenters who will have more than one document to share during their presentation can change documents by clicking on the *New Share* tab at the top of their screen. They will be prompted to choose and share the new document. Note: the attendees’ view will not change until you select ‘Share’ in the final step.



Presenters who wish to stop sharing their documents will need to click on the *Stop Share* button at the top of their screen. Attendees and Presenter/Panelists will no longer be able to see their documents.

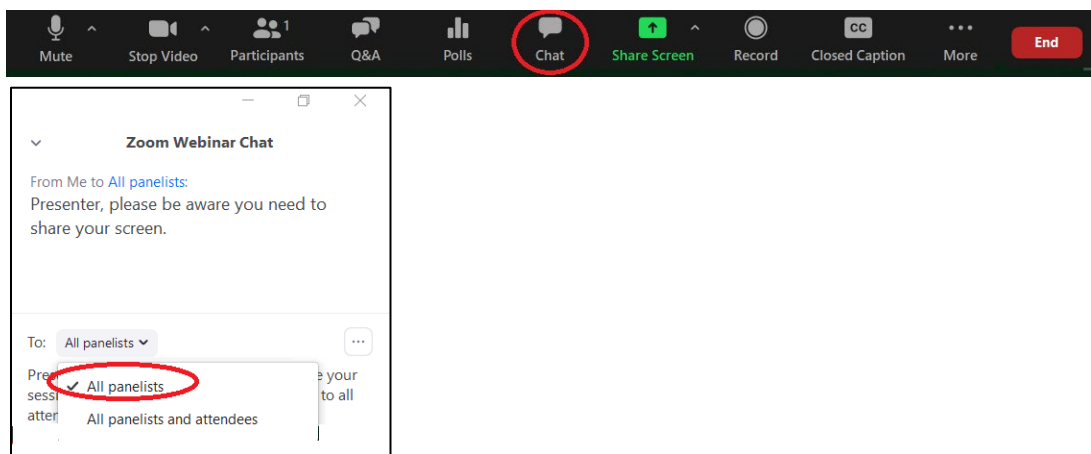


- 2) Ask the presenters if they plan to do a Q&A session the last 15-minutes of their presentation. If they plan to have Q&A, please be prepared to share with the presenter(s) at the beginning of the Q&A portion the most frequently asked questions or questions that you feel the attendees would most like answered.
- 3) **Ask the presenter to continue sharing their screen with their contact slide showing during the Q&A session.** This will allow the attendees to write down their contact information and to contact them directly if not all questions were able to be answered.
- 4) Let them know they will only have time for a few questions and then we will need to end on time. Attendees can contact them directly if their questions were not answered.
- 5) Let them know that you will make an announcement two minutes before the session is scheduled to end and to wrap up the last question so you can end the session for all attendees including the presenters. Presenters will not be able to stay in the Zoom room after the session

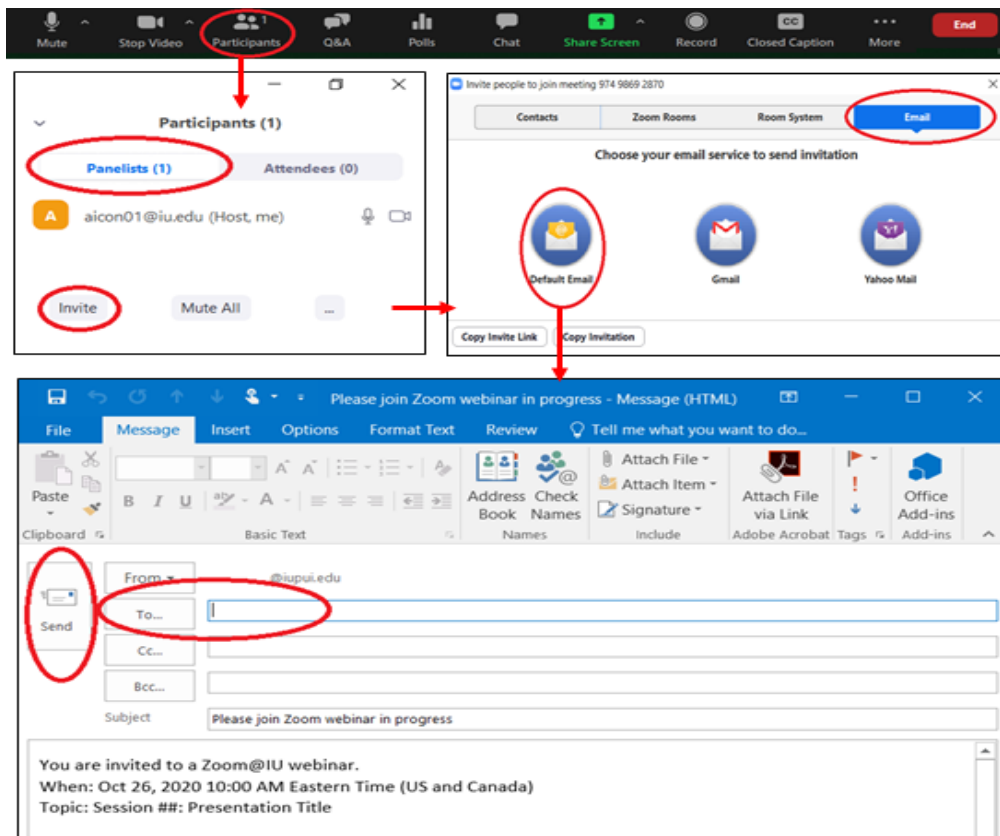
has been ended.

- 6) Let the presenter(s) know it is important to end on time due to time constraints. **Institute sessions are often scheduled back-to-back, so please be respectful of other presenters and finish on time.** Some Moderators will need to be available for their next session.
- 7) Let them know you will be muted during their presentation and will unmute yourself when they are ready to start the Q&A. If for any reason you need to get ahold of them during their presentation while you are muted, let them know you will either unmute yourself and interrupt or use the chat feature sending a personal message to the panelist(s)/presenter(s) only. **Please be sure to only choose the *All Panelist* option.**

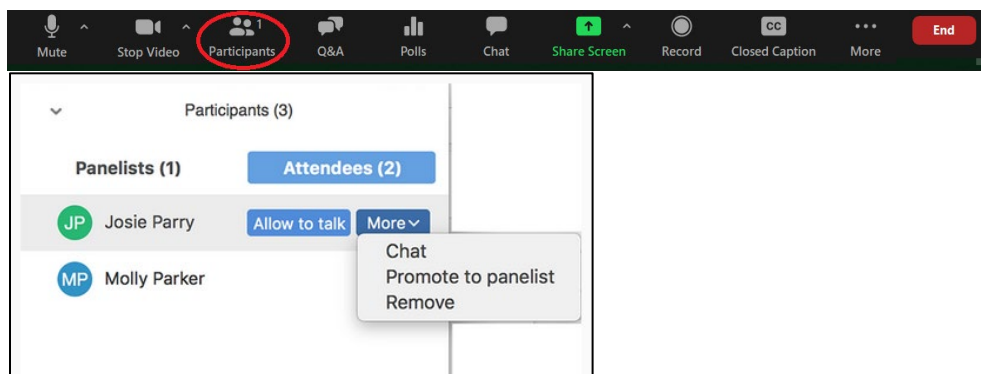
If you wish to send a chat message to the all attendees, please choose the *All Panelist and Attendee* option.



- 8) If the Panelist/Presenter needs to add another Panelist/Presenter during the Practice Mode, you (Moderator/Host) will need to click on the *Participants* tab at the bottom of your screen. This will bring up the *Participant* window on the right hand side of your screen. You will need to click on the *Panelist* tab, then the *Invite* button to bring up the *Invitation* window. In the *Invitation* window you will need to click on the *Email* tab and then choose the *Default Email* option. This will open up your Outlook where you can type in the email of the Panelist/Presenter you wish to invite. The new Panelist/Presenter will need to use the URL in that email to join as a Panelist/Presenter.



If a Presenter/Panelist should mistakenly use the Attendee URL to login to their session instead of the unique Panelist URL sent to them, you (Moderator/Host) will need to promote the presenter from an *Attendee* to a *Panelist*. You will need to click on the *Participants* tab at the bottom of your screen. This will bring up the *Participant* window on the right hand side of your screen. You will need to click on the *Attendees* tab then scroll down and search for the name of the Attendee that needs to be promoted to a Panelist. You will then need to hover over the attendee's name and click on *More*, and then choose *Promote to Panelist*.



Beginning the Session:

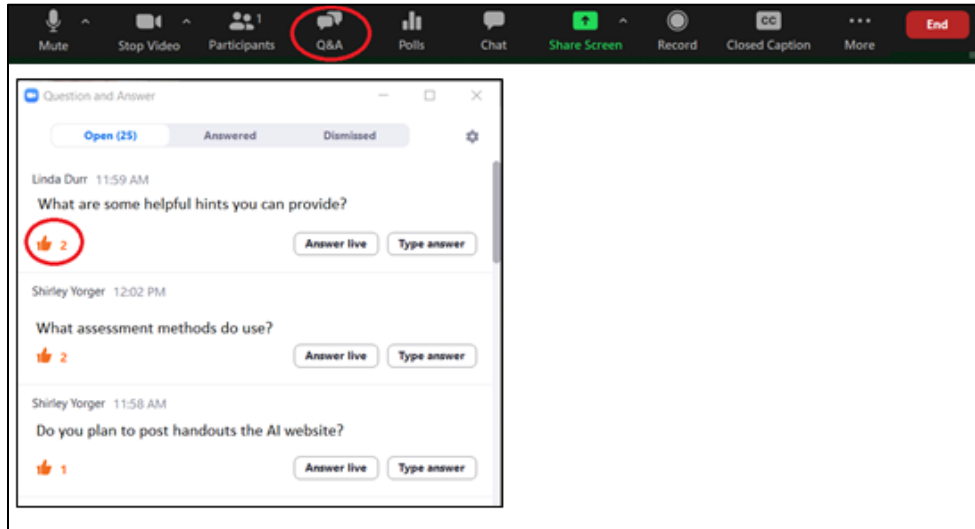
When the session is scheduled to begin, **the Moderator should go to the bright orange banner at the top of the Zoom room and click on *Broadcast* button, this will BEGIN THE SESSION. At this time, the session will be live to all attendees.**

**Please do the following once session is live:**

- 1) When the session begins and is broadcasting live, you as the Moderator will say either of the two below statements depending on the length of the session. Please note you will receive a more detailed script with the presentation title, speakers, and end time for each session you are moderating.
 - a) 60-Minute Presentation Script Example: *Thank you for attending the [Insert Presentation Title] session. My name is [insert name and institution] and I will be moderating the session. Our speakers will present for 45-minutes and have Q&A for 15-minutes, before we have to end the session promptly at [Insert Session End Time]. If we are not able to answer all of your questions, please contact the presenter directly at the email address listed on their last slide or in the presenter list provided to all attendees on the Assessment Institute website. This session is being recorded and placed on the Assessment Institute website shortly after the Institute. From here, I will turn it over to the Presenters to introduce themselves and begin their presentation.*
 - b) 30-Minute Presentations (20-Minute Presentation & 10-Minute for Q/A) Script Example: *Thank you for attending the [Insert Presentation Title] session. My name is [insert name and institution] and I will be moderating the session. Our speakers will present for 20-minutes, and have Q&A for 10-minutes, before we have to end the session promptly at [Insert Session End Time]. If they are not able to answer all of your questions, please contact the presenter directly at the email address listed either on their last slide or in the presenter list provided to all attendees on the Assessment Institute website. This session is being recorded and placed on the Assessment Institute website shortly after the Institute. From here, I will turn it over to the Presenters to introduce themselves and begin their presentation.*
- 2) After you have introduced the presenter(s), **please mute yourself.** This will allow only the presenters to be the active speakers during the presentation portion. The attendees will only see one speaker at time, based on who is speaking. If there is more than one speaker, you might suggest the non-speaking presenters mute themselves too until they are ready to speak.
- 3) During the session, the Q&A box at the bottom of the screen will be active for the attendees to ask questions. You will need to monitor the questions as they come in. Please be prepared to share with the presenter(s) at the beginning of the Q&A portion the most frequently asked questions or questions that you feel the attendees would most like answered. You will need to look for the questions that have the orange thumbs up icon with the most votes. This will indicate how many people are interested in knowing the answer to that question. If there are questions that you can answer during the session, please do so by **typing** the answers.

Once the Q&A has started, you will need to **unmute yourself** so you can provide the presenter(s) with the frequently asked questions. The presenters may want to handle the Q&A themselves or not take Q&A, but please verify with them before the session is broadcast live in the Practice Mode session. Please be aware of time. You may only have time for the presenter to answer one or two questions.

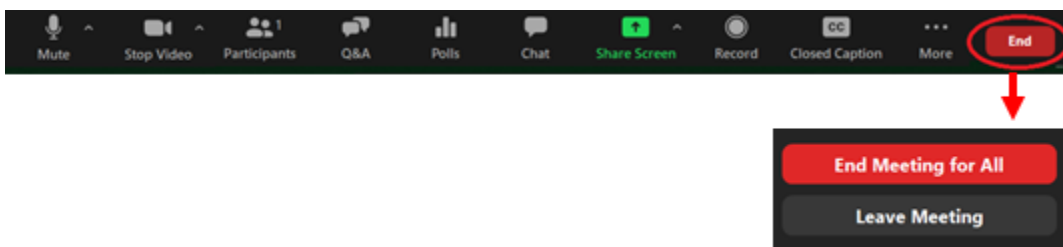
You and the presenters can get to the Q&A screen by clicking on the Q&A button at the bottom of your screen. After clicking on the Q&A button the Question and Answer box will appear in the middle of your screen. Please monitor the questions during the presentation so that you can assist during the Q&A portion of the presentation.



- 4) **You must end the session ON TIME.** With five minutes to go, please make the announcement: *“Thank you for attending the session today, this will be the last question before we will need to end the session.”*

After the last question has been answered, please say: *“Thank you everyone. You will need to contact the presenter(s) directly if you have additional questions. As a reminder, this session was recorded and will be placed on the Assessment Institute website shortly after the Institute along with any handouts the presenter wishes to have posted.”*

- 5) When the presentation is over, please end the session by clicking on “End” at the bottom right hand side of your screen and then clicking on the *End the Meeting for All* button. **IMPORTANT:** Only click on the *End Meeting for All* button if the presentation is completely over. This will end the meeting indefinitely and no one will be able to get back in. If you need to leave the meeting for any reason before the presentation has concluded always choose the *Leave Meeting* button.



IMPORTANT TAKEAWAYS:

- 1) Familiarize yourself with Zoom Webinars.
- 2) Contact, prepare, and rehearse your role as Moderator with the Presenters in advance.
- 3) **Use the unique URL sent to you in the computer generated Zoom Webinar email invitation to access the webinar session for you only.** If you are moderating multiple sessions, you will receive a computer generated Zoom Webinar email invitation for each session you are moderating. **Do not use the link provided to all attendees.**
- 4) There are no breakout rooms in a Zoom Webinar.
- 5) You as Moderator must be the **HOST** of the meeting.
- 6) The **Institute Organizer must change the session to Active Speaker View** under the *Participants* tab.
- 7) **Make sure the session is recording.** Attendees not able to attend live will be able to view the recording on the Assessment Institute website at a later date.
- 8) **DO NOT** click on the *Broadcast* button until you are absolutely sure the presenters are ready to go live to all attendees.
- 9) If you need to get the presenter's attention during the session while you are muted, try sending a **PRIVATE** message in chat to the Presenter/Panelist directly or to all of the Presenters/Panelists. **DO NOT** include the attendees in this direct chat.
- 10) End the session on time. **Institute sessions are often scheduled back-to-back, so please be respectful of other presenters and moderators.**
- 11) As Moderator/Host you will choose the *End the Meeting for All* once the presentation has concluded.

HELPFUL LINKS:

- 1) [Zoom Frequently Asked Questions](#)
- 2) [Sharing Your Screen in Zoom](#)
- 3) [Question and Answers in Zoom](#)
- 4) [Claiming Host Role in Zoom](#)
- 5) [Managing Participants in Zoom](#)

ASSESSMENT INSTITUTE CONTACT INFORMATION DURING THE INSTITUTE:

If you should need to contact the Assessment Institute staff during the Institute, please see contact information below. Text or Email is the best method to contact us during the Institute. Please call a phone number as a last resort because Institute organizers might be moderating a session.

Angela Bergman | Cell: 317-507-9610 | Email: planning@iupui.edu
Stephen Hundley | Cell: 317-847-8383 | Email: shundley@iupui.edu
Michele Trent | Cell: 317-407-1231 | Email: mtrent@iupui.edu
Shirley Yorger | Cell: 317-777-1958 | Email: syorger@iupui.edu
Assessment Institute Office Number: 317-274-4111