

# 2021 Assessment Institute

## Institute Organizer and Moderator Instructions for Pre-Workshop and Concurrent Sessions

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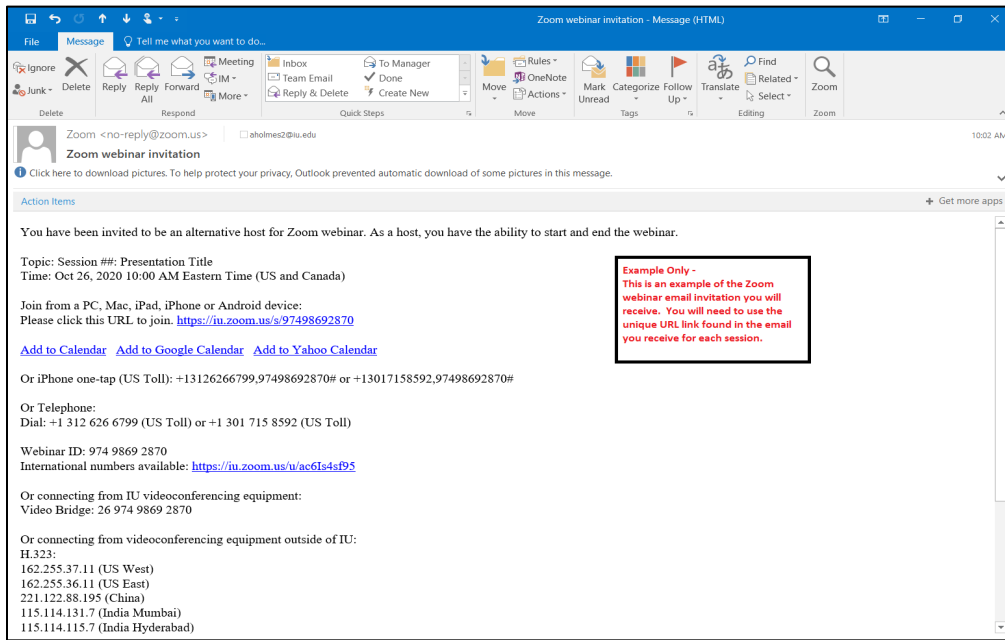
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### ZOOM WEBINAR SESSION

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 Presenters/Panelists can share their video, audio, and screen with the Institute attendees. A Zoom Webinar does not allow for breakout rooms. During your session, Presenters/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.

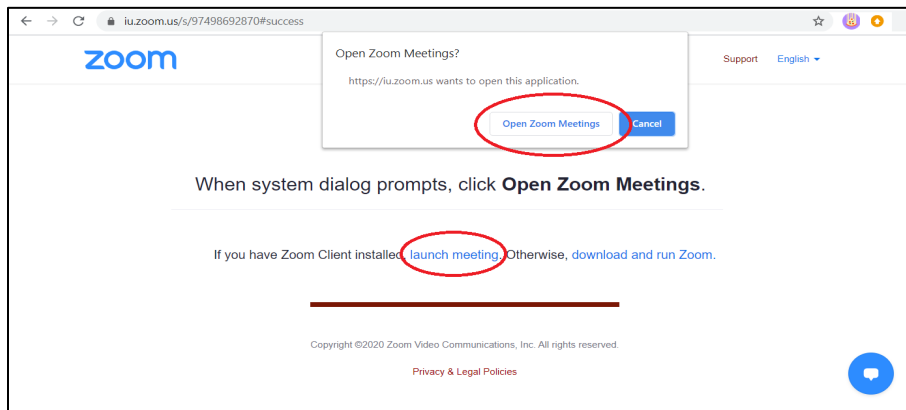
### ZOOM WEBINAR INVITATION EMAIL

Depending on whether you are IU personnel, 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.**

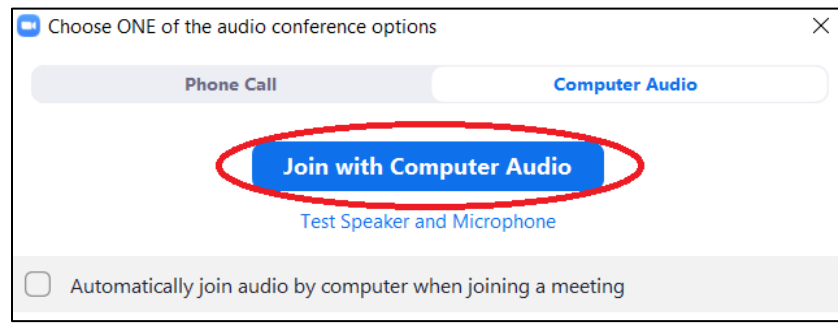


## LAUNCHING THE ZOOM WEBINAR SESSION

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, 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.



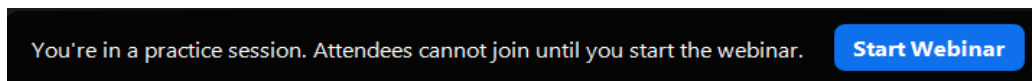
After opening or launching the Zoom session, you will be asked to choose one of the audio conference options. Please click on *Join with Computer Audio*.



## INSTITUTE ORGANIZER AND MODERATOR SESSION INSTRUCTIONS

### Joining the Webinar Session:

The Institute Organizer and the Moderator will need to log into each Webinar session 15-minutes before the start of the session using the unique URL provided to them in a Zoom Webinar invitation email. The 15-minutes before the start of the Webinar will be a *practice mode*. During *practice mode* the Institute Organizer will set-up the webinar session and then transfer Host duties to the Moderator. During the *practice mode* the Institute Organizer and the Moderator will be able to speak with the presenters, verify their roles, 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 black practice mode banner at the top of your Zoom screen. **IMPORTANT: DO NOT click on the blue *Start Webinar* 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.**

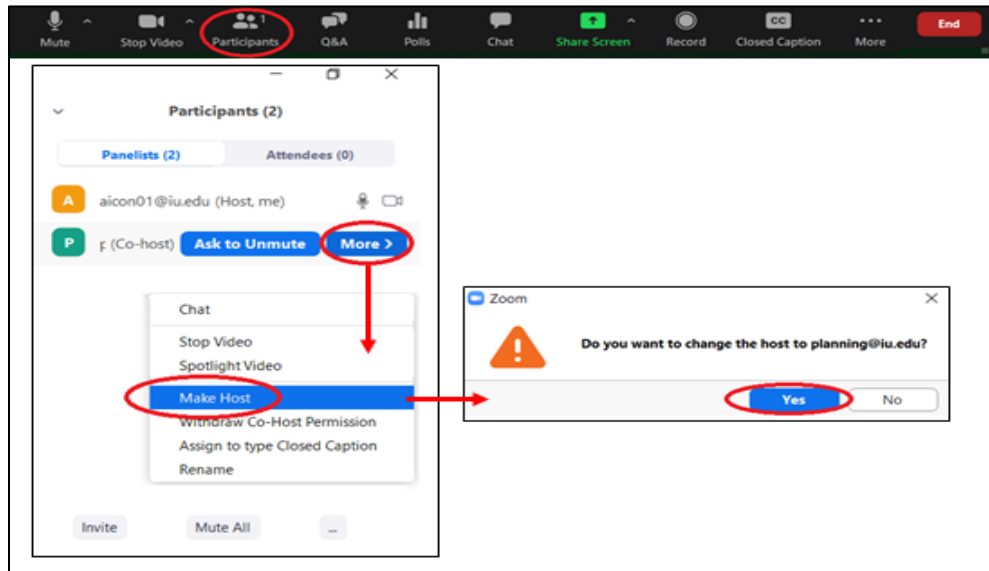


In some cases, the Institute Organizer will be assigned both the Organizer role and the Moderator role. In this instance, they should follow the steps for both roles outlined in this document.

### 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 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.



### Institute Organizer Role

There will be an Institute Organizer assigned to set-up each Zoom Webinar session in Practice Mode. An Institute Organizer will open the Zoom Webinar room allowing the Presenters/Panelists and Moderators/Host to enter Practice Mode for their session. The Institute Organizer is there to answer questions and ready the Zoom room for the presentation before transferring Host duties to the Moderator/Host and leaving the Zoom room. 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.

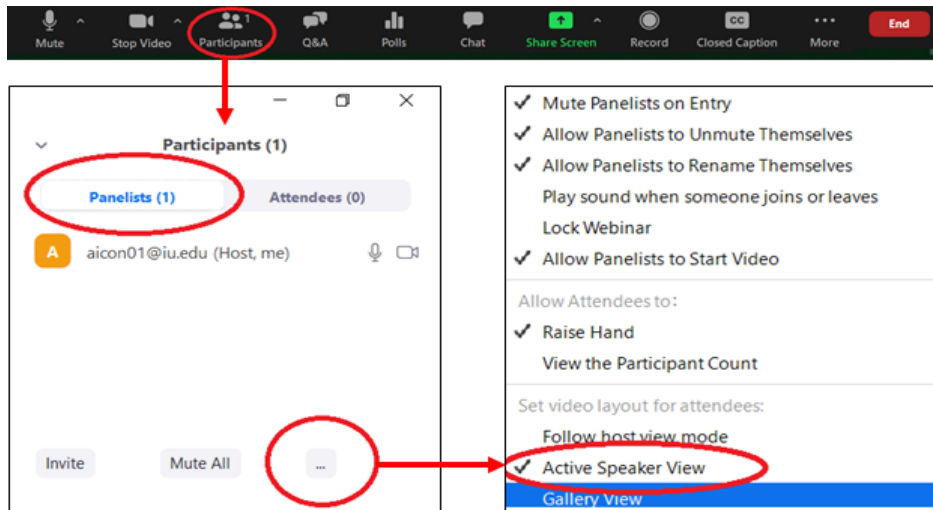
### Webinar Room Set-Up Instructions for “Institute Organizer” in Practice Mode:

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.

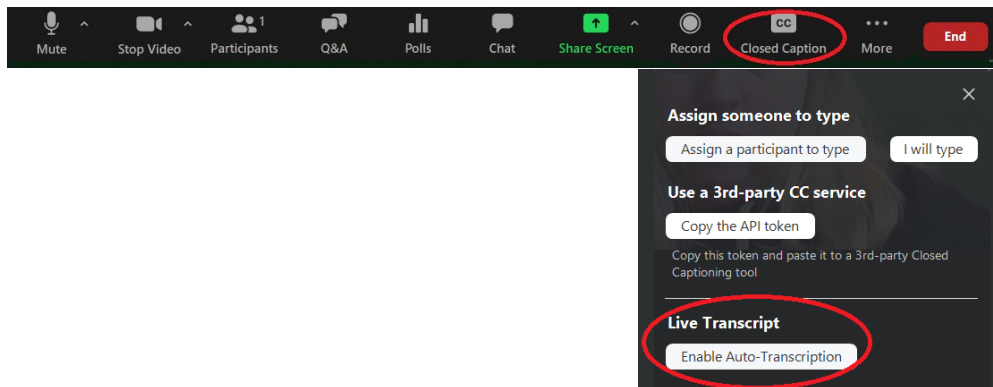
#### **Institute Organizer, please do the following when you log in:**

- 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) The Institute Organizer will need to set the video layout for attendees to active speaker view (see example on next page):
  - a) Click on the *Participants* tab at the bottom of the screen. This will bring up the *Participant* window on the right side of your screen.
  - b) Under the *Participant* window you will see a tab for the *Panelists/Presenters* and a tab for *Attendees*.

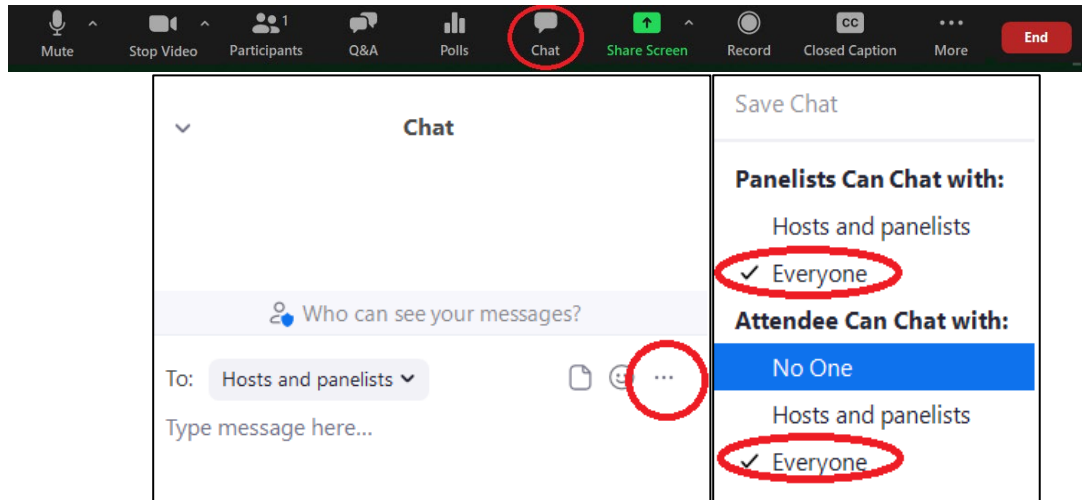
- c) Click on the *Panelist* tab. The *Panelist* tab will list all of the Panelists/Presenters, and yourself as the Host/Moderator.
- d) Click on the 3 dots on the bottom right of the participant box (if you have a MAC instead of 3 dots you will see the word 'More')
- e) Choose list of options
- f) Choose 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.
- g) Exit out of the *Participant* window to make it disappear by clicking X.



- 3) **The Institute Organizer will need to turn on Closed Caption/Live Transcript before leaving the Zoom room. IMPORTANT: Closed Caption should be on for the duration of the session and should NOT be turned off.** If for some reason it gets turned off, please advise the Moderator/Host they will need to turn it on by going to the bottom of the screen and clicking on the Closed Caption button. This will prompt the Moderator/Host to choose either *Assign Someone to Type*, *Use a 3<sup>rd</sup> Party CC Service*, or *Enable Auto Transcription*. **Choose *Enable Auto Transcription***. After choosing *Enable Auto Transcription*, Zoom will automatically start transcribing.



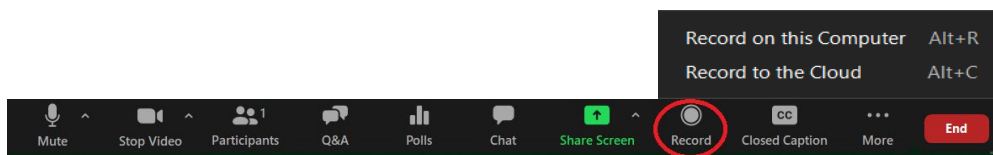
- 4) The Institute Organizer will need to select Chat for everyone by going to the bottom of the screen and clicking on the *Chat* button. This will bring up the *Chat* window on the right side of your screen. Click on the 3 dots on the bottom right of the chat window (if you have a MAC instead of 3 dots you will see the word 'More'). This will bring up a list of options. You will need to check "Everyone" under the *Panelists Can Chat with:* options and check "Everyone" under *Attendee's can chat with:* options.



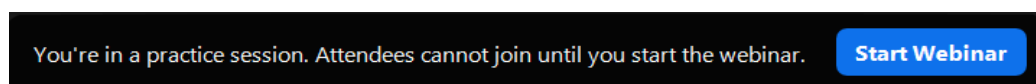
- 5) The webinar has been automatically set to record. The Institute Organizer should advise the Moderator to look in the upper left corner of their Zoom screen to make sure the recording red light indicator appears immediately after they begin broadcasting. **Please let the Moderator know they should not stop recording if the red recording indicator light is on.**



Please advise the Moderator if the recording indicator image does not appear on their screen, they will need to manually set the session to record by going to the bottom of their screen and clicking on the *Record* button. This will prompt them to click either *Record to this Computer* or *Record to the Cloud*. They will need to **Choose Record to the Cloud**. By clicking *Record to the Cloud*, the *Recording* tab will appear in the upper left corner of the Moderators Zoom screen letting them know the session is being recorded.



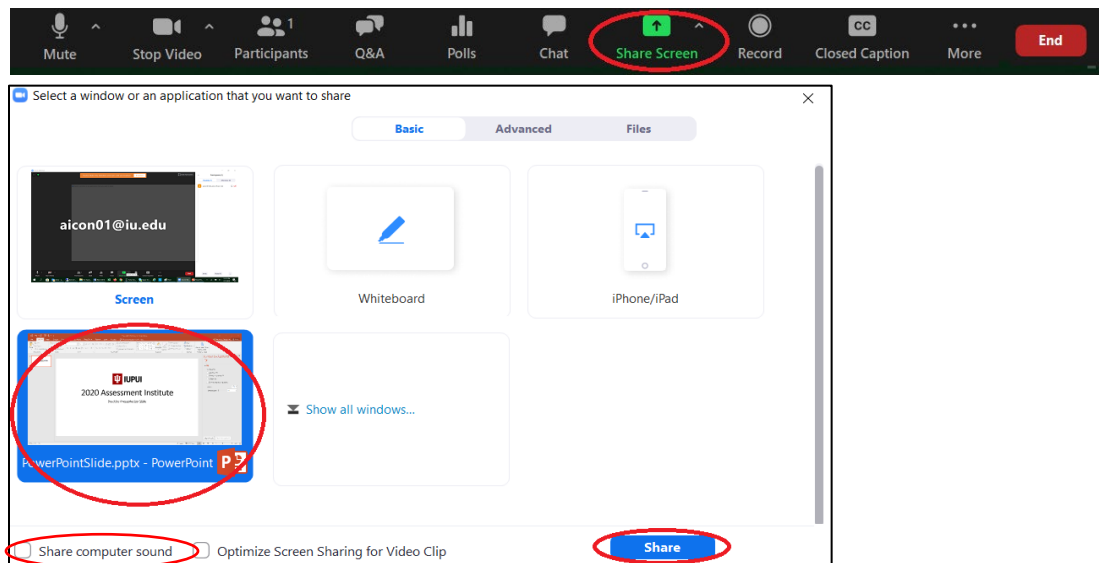
- 6) Before transferring Host duties, the Institute Organizer will need to explain to the Moderator they will notice a black bar with a blue *Start Button* appear at the top of their screen once you transfer Host duties to them. **Advise the Moderator to NOT click on the blue *Start Webinar* button until all presenters have joined the session, practiced, and are ready to begin their session at the designated time. The blue Start Webinar will BEGIN THE SESSION. Once this button has been clicked on, the session will be live to all attendees. They cannot stop broadcasting the session if they accidentally click this button.** (See [Beginning the Session](#) for Moderators).



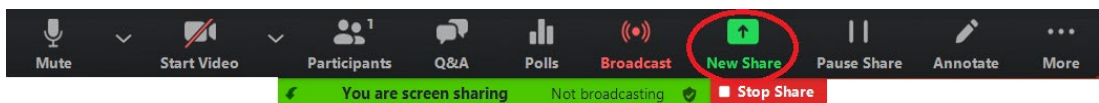
- 7) The Institute Organizer will need to transfer Host duties to the session Moderator after you have set-up the Zoom Room and explained how the Moderator should begin the session.
  - a) Click on the *Participants* tab at the bottom of your screen. This will bring up the *Participant* window on the right side of your screen.
  - b) 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.
  - c) 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.
- 8) The Institute Organizer will need to verify the Moderator and Presenters know how to share their screen and audio.

First, have them open the shared 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 the presenters screen, the Moderator/Host 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 should 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.

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.

- 9) 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.**
  
- 10) **If you are an Institute Organizer and a Moderator for the session, please continue to the next steps for Moderators.**

#### **Moderator Role:**

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.

#### **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/she leaves the Zoom session.**

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

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.

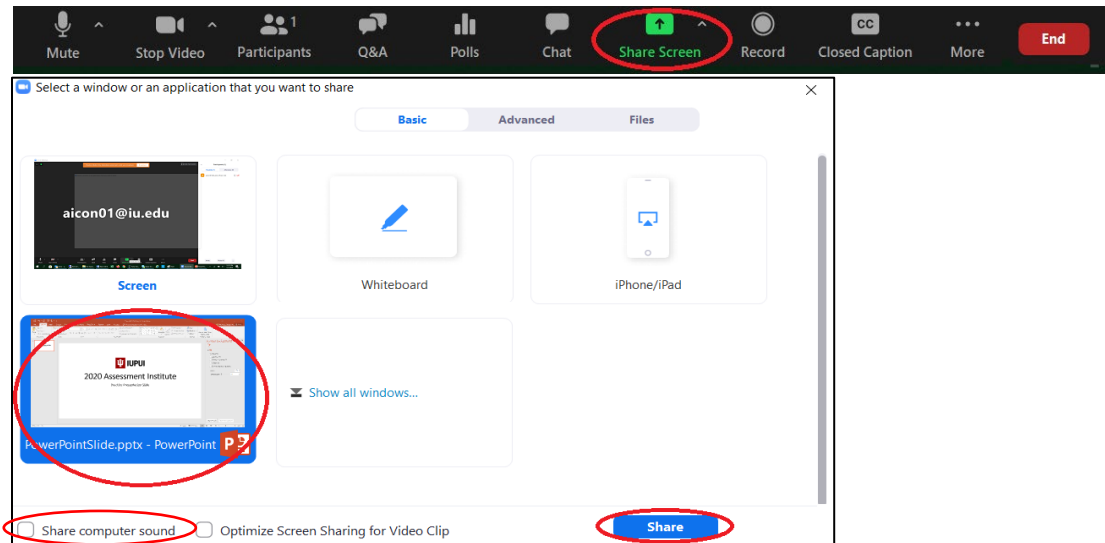
- 1) Have the presenter practice sharing their screen in Practice Mode. Please suggest to the presenter(s) that they close any unnecessary windows on their desktop. They should only have open the documents they plan to share during their presentation.

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

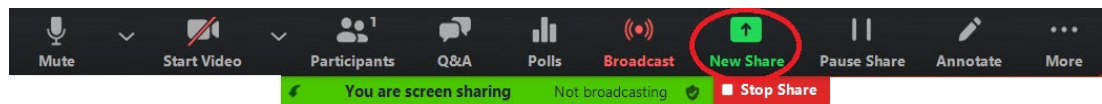


First, have them open the document to their desktop. Then in Zoom, have them click on the *Share Screen* button located at the bottom of their screen. Next, Zoom will display available options from their desktop; they will need to select the document they want to share, and if it also contains audio, 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.

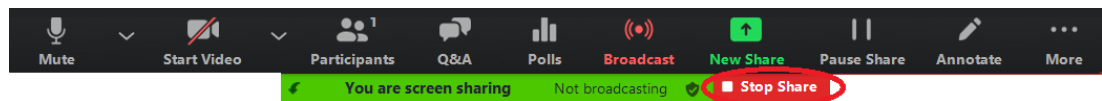
Note: if the “Share Computer Sound” option is not available on your screen, your Moderator will need to make the person sharing the screen with sound a Co-Host.



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.**



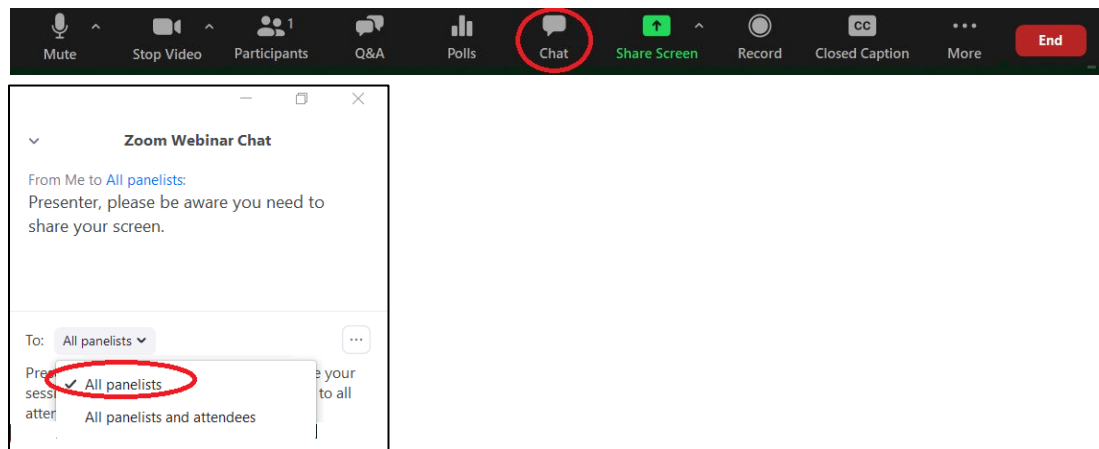
Presenters who wish to stop sharing their documents should click on the *Stop Share* button at the top of their screen. Attendees and Presenter/Panelists will no longer be able to see their documents.



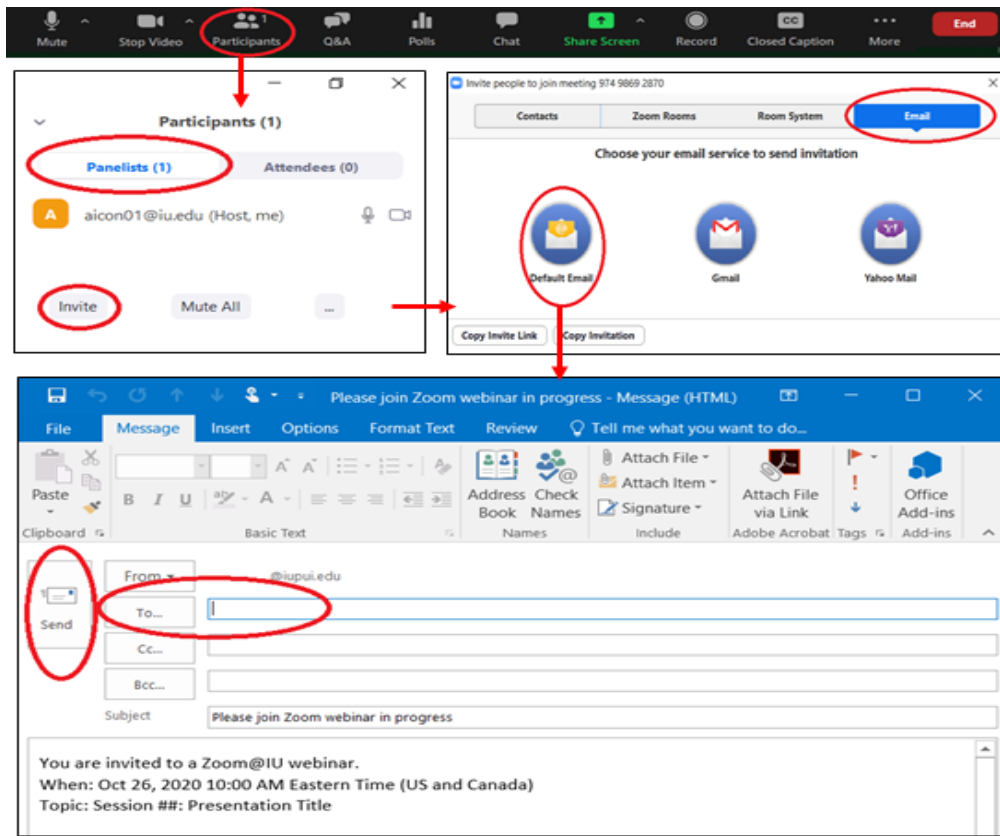
- 2) If a concurrent session, ask the presenters if they plan to do a Q&A session the last 15-minutes of their presentation (pre-Institute workshops will take Q&A throughout workshop). If they plan to have Q&A, please be prepared to share with the presenter(s) at the beginning of the Q&A portion the 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 the presenters 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 the presenters know that you will make an announcement **five 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 the presenters 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 communicate with the presenters 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.**

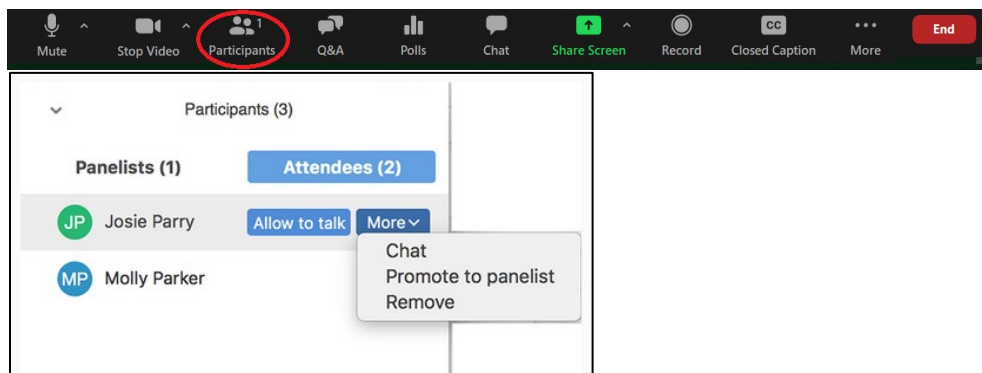
If you wish to send a chat message to all attendees, please choose the *All Panelist and Attendee* option.



- 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 side of your screen. You will need to click on the *Panelist* tab and 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 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.

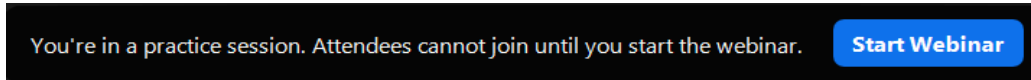


If a Presenter/Panelist should mistakenly use the Attendee URL to login to their session instead of the unique Panelist URL sent to them, you (Moderator/Host) will need to promote the presenter from an *Attendee* to a *Panelist*. You will need to click on the *Participants* tab at the bottom of your screen. This will bring up the *Participant* window on the right 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 click on to the blue *Start Webinar* button at the top of the Zoom room. This will BEGIN THE SESSION. At this time, the session will be live to all attendees and automatically set to record. **IMPORTANT:** 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 too early. If you do click on this button accidentally before the start of the session, periodically tell the audience you will start your session at the designated time on the schedule.

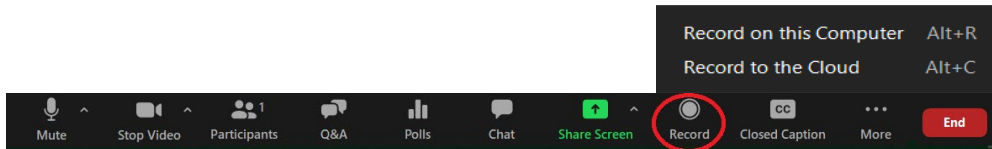


Please do the following once the session is live:

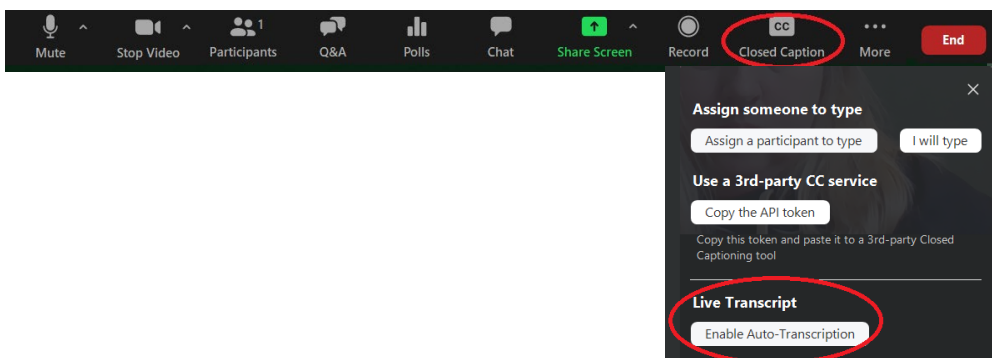
- 1) The webinar has been automatically set to record to the IUPUI Cloud. The Moderator will need to glance in the upper left corner of their Zoom screen to make sure the recording red light indicator appears immediately after they begin broadcasting. Please **DO NOT** stop recording if the red recording indicator light is on.



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



- 2) The Institute Organizer will need to turn on Closed Caption/Live Transcript before leaving the Zoom room. **IMPORTANT:** Closed Caption should be on for the duration of the session and should **NOT** be turned off. If for some reason it gets turned off, please advise the Moderator/Host they will need to turn it on by going to the bottom of the screen and clicking on the Closed Caption button. This will prompt the Moderator/Host to choose either *Assign Someone to Type*, *Use a 3<sup>rd</sup> Party CC Service*, or *Enable Auto Transcription*. **Choose Enable Auto Transcription**. After choosing *Enable Auto Transcription*, Zoom will automatically start transcribing.



3) 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.*

c) Pre-Institute Workshop Script Example: *Thank you for attending the [Insert Presentation Title] Workshop. My name is [insert name and institution] and I will be the Moderating the workshop. The speaker(s) has planned an engaging workshop for everyone and will take time for questions and answers throughout. If they/he/she are/is not able to answer all of your questions, please contact the presenter(s) 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 will be 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 workshop.*

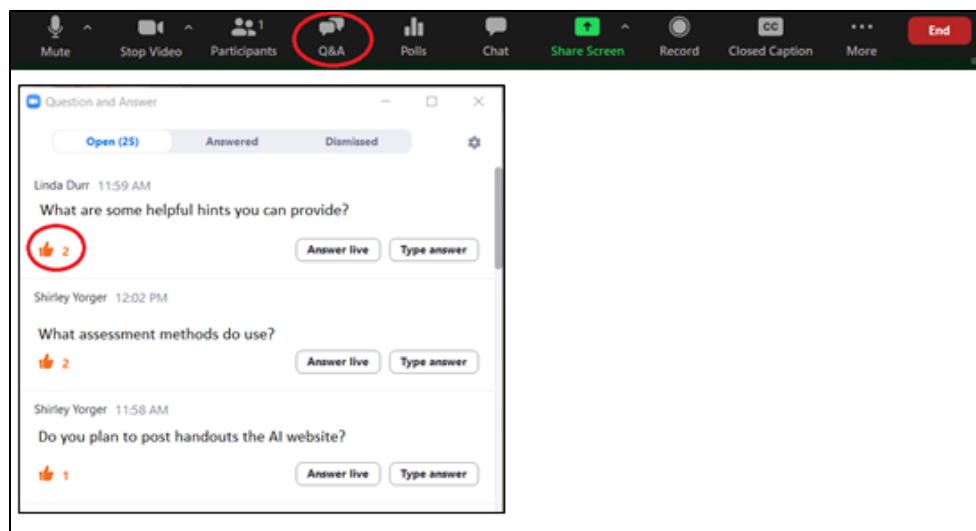
***Please note there will be a planned break halfway through the workshop. During the break, we ask that you do not logout or leave the Zoom Webinar session to ensure you remain in the workshop for the duration.***

4) After the Moderator has 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 also mute themselves until they are ready to speak.

- 5) During the session, the Q&A box at the bottom of the screen will be active for the attendees to ask questions. The Moderator 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 in the Practice Mode session before the session is broadcast live. Please be aware of time. You may only have time for the presenter to answer one or two questions.

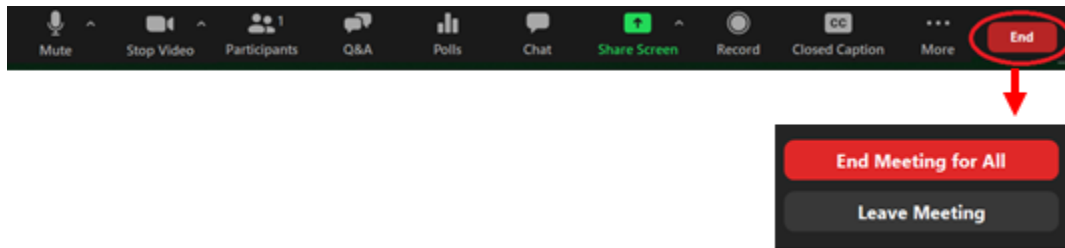
You and the presenters can get to the Q&A screen by clicking on the Q&A button at the bottom of your screen. After clicking on the Q&A button, the Question and Answer box will appear in the middle of your screen. Please monitor the questions during the presentation so that you can assist during the Q&A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



- 6) **The Moderator 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.”*

- 7) When the presentation is over, please end the session by clicking on “End” at the bottom right 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 blue *Start Webinar* 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 option *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.

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