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# Guidelines and Best Practices

## Paper Presentations

There are three main types of presentation formats for the virtual meeting:

- **Pre-recorded paper presentations (optional):** Presenters may record their presentations, including any audio or video elements, as a single digital video format that will be available on-demand and that will be played during a live paper session that includes Q&A.
  - You can find guides to recording a presentation using Zoom or Powerpoint online.
  - During your live session, you may then play your recording at your scheduled presentation time, followed by live Q&A.
  - Play your recording from the device where you are running Zoom, using Share Screen to share with the audience. See [Presenting over Zoom](#) for important Zoom settings to make this possible.
  - Do not plan to use Share Screen as you stream your recording while you are running Zoom, since you may overload your bandwidth. If your recording is only available via a streaming service, you may opt to share the streaming access information with your audience and ask them to stream the video themselves, then reconvene in Zoom when they are done.
  - In 2021, AFS is not asking presenters to upload their pre-recorded presentations in advance.
- **Live paper presentations:** Presenters give their papers over Zoom in real time during a live paper session that includes Q&A. Presenters play media using Share Screen. See [Presenting over Zoom](#) for important Zoom settings if you are sharing audio.

## Identification Practices

There are a number of steps all attendees should take to take to maximize clarity during a presentation or discussion.

- **Profiles:** Before the meeting, update your profile using the steps listed in the [Profile Setup](#) section to make it easier for other attendees to identify you correctly.
  - **Profile picture:** Your profile picture will appear as a placeholder for your video whenever your camera is off. You may choose to upload an image file provided by AFS that serves as a digital name tag, including your name and other salient information. See the Annual Meeting page for more information about an AFS “virtual name tag.”
  - **Display Name:** You should make sure that your display name reflects your professional name. Please note that the display name field on Zoom can only show 15 characters including spaces.
  - **Verbal Identification:** All attendees should verbally identify themselves as appropriate when beginning to speak. This will help participants who cannot view video of the session proceedings to better follow who is speaking.

## Presenting over Zoom

The following section advises some best practices for presenters.

- **Setup:** Open Zoom in advance of your scheduled session to test your audio and video. Make sure you are in a space with minimal background noise, and be sure to speak toward your microphone.
- **Audio:** Be aware that your microphone will be muted when you first join your session. You can manually unmute yourself when cued by the moderator, or the moderator can do this directly.
  - When you are not speaking, be sure to mute your microphone.
- **Video:** You may choose whether or not to have your video on during your presentation. Keep in mind that for many attendees, it may be easier to follow a presenter whose face is visible; however, presenting with video enabled may also reduce your internet connection speed.
  - If you choose to use video, try to keep your computer or external camera on a stable surface in order to minimize distracting movements.
  - To minimize distractions for viewers, we recommend you turn off your camera if you need to take care of business outside of the meeting when possible (ex. someone in-person needs your attention or you need to physically move). You can turn the camera back on when you are present in the meeting again.
- **Introductions:** At the start of your presentation, introduce yourself. Remember that some attendees may not be able to see your video, and your verbal introduction will be important for accessibility.
- **Sharing AV Materials:** Use Screen Share to share all AV files, including audio, slides and video. Accessing those files on your local device may reduce the load on your bandwidth when you play them during live sessions. As a backup plan, you may share your files in advance with your co-panelists, in case you have any difficulties with your own files or controls. Make a plan in advance with your chair or other Zoom co-hosts to cue screen sharing and playback.
  - For an informational video detailing the process for recording your presentation with a slideshow, follow this link:  
[https://www.youtube.com/watch?v=\\_xGzip9IgNM](https://www.youtube.com/watch?v=_xGzip9IgNM)
  - Note: You must specifically “tick” the box to share audio using Screen Share; see <https://support.zoom.us/hc/en-us/articles/201362643-Sharing-Computer-Sound-During-Screen-Sharing>. If you want to include only audio, go to Screen Share (lower tool bar) > Advanced (in the upper tool bar) > Music or Computer Sound Only > Share.

## Participating in Live Discussions

Regardless of format, all panels and forums will include some live discussion within a Zoom meeting. This section of the document covers expectations for all attendees and presenters for managing and participating in live discussion.

### Settings for Live Discussions

All live discussions will have certain settings in place to help facilitate a smooth and secure discussion.

- **Audio/Video:** All attendees will be initially muted upon entering the discussion space. Participants will be able to mute and unmute themselves, as well as turn on or off their own video. The meeting host will also have that capability.
  - Participants should remain muted when they are not speaking to avoid background noise. The best practice for non-presenting participants is to remain on mute throughout the session, then press and hold the space bar to unmute while speaking.
  - Whether you leave your camera on or off is up to you. If you would prefer not to use live video, you may be able to replace your profile picture in Zoom with a virtual nametag listing your name and other salient information; AFS will provide a template on the annual meeting webpage. This will serve as a placeholder for your video in Zoom. Details about setting up your profile picture and display name can be found in the [Profile](#) section of this guide.
- **Chat:** The in-meeting chat feature allows participants to communicate publicly and privately throughout the meeting without needing to unmute themselves or interrupt a speaker. A moderator should monitor this chat throughout the meeting to ensure that questions and issues are addressed in a timely and equitable fashion. The moderator may also see fit to answer some questions publicly in the chat or, like other users, send private messages as needed.

### Conducting In-Meeting Communication

Participants can communicate non-verbally during meetings using built-in Zoom tools. These tools are detailed in the [Communicating with Hosts and Other Attendees](#) section. This section offers best practices for conduct.

- Keep all your chat messages on-topic and appropriate to your meeting. Remember that anything you say in public chat space is visible to all attendees and will also be recorded in a text file after the meeting, with access specifications to be forthcoming.
- Minimize your use of private messages to hosts (chairs and moderators) to necessities in order to allow them to focus on their duties during meetings. “Private” messages are also preserved in the recorded chat, viewable to all.
- When possible, if your question is for specific individuals, flag their names.
- Only use participant list icons as signals when directed. Chairs and moderators will need to determine ahead of time whether they have the capacity to monitor these as signals in addition to chat.
- Be patient during question and answer sessions. Chairs and moderators may have many questions to compile and sort through, and they will get to as many as they can in the time allotted.

### Moderating a Session

Hosts have unique privileges over other attendees, as well as specific responsibilities in running meetings. Hosts are designated before the meeting, and can designate other users (such as chairs or moderators who are not already hosts) as hosts or co-hosts after starting the meeting.

Host duties may be assigned to someone other than the chair of a session. We recommend that chairs consider designating a moderator to help manage participants and monitor the feedback that participants share in non-verbal responses and chat.

- **Be aware of your abilities:** As a Zoom host, you have the ability to monitor participants in unique ways. For example, you can mute, unmute, rename, and remove participants.
- **Share housekeeping details with attendees:**
  - Remind them to mute their mics when others are presenting or speaking.
    - As host, be ready to manually mute or unmute attendees who are having trouble with their audio, either by muting/unmuting all participants at once or by selectively muting/unmuting individual participants. See [Muting and Unmuting Participants](#) for details.
- **Communicate expectations:** Let participants know how they can get your attention during the meeting, drawing on the tools mentioned in [Communicating with Hosts and Other Attendees](#).
  - Will you be checking the chat window?
  - Should they unmute themselves to speak up?
  - Should they use participant list icons?
  - **Note:** Remember that not everyone sees all video portraits in the same configuration. When possible, call on people by name, rather than referring to positions of video portraits.

## Technical Guidelines

Attendees will be able to join Zoom meetings through links on the conference website for each session. The following section includes information about setting up and using Zoom on your computer.

### System Requirements

All participants, especially presenters, should make sure that they have adequate bandwidth and equipment, including a computer with Zoom software installed (strongly recommended) or the capability to run the Zoom web browser client. Google Chrome is recommended if you choose to connect with Zoom online. You can [check your bandwidth](#) here. See also [Zoom's system requirements](#).

### Profile Setup

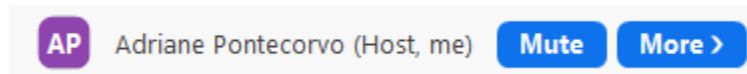
Before the meeting, update your profile so that the display name reflects the name by which you would like to be addressed. To access your Zoom profile, sign in to the Zoom web portal and click Profile. You can view and edit the following settings, among others:

- **Profile picture:** To add or change your profile picture, click **Change**, then adjust the crop area on your current picture or upload a new one. You can also delete your profile picture by clicking **Delete**. This profile picture will show in place of your video if at any time you decide to turn your video off during a meeting.

- If your system supports it, you may choose to use a virtual name tag as your profile picture for the conference. A virtual name tag is simply an image file that includes your name and any other salient information, making it easier for other attendees to address you appropriately. You might also choose to add this name tag as a virtual background if you would like to keep your video on during the meeting. AFS will provide a meeting-specific template on the 2021 Annual Meeting page in time for the meeting.
- **Name:** To change your display name, click **Edit** on the right side. You can also add other profile information including Department, Job Title, Company, and Location.
- **Making changes during your meeting:** To change your name after entering a Zoom meeting, open the list of participants by clicking the **Participants** icon in your tools.



- Next, hover your mouse over your name in the participants list on the right side of the Zoom window. Click on **More** to reveal a drop-down menu.



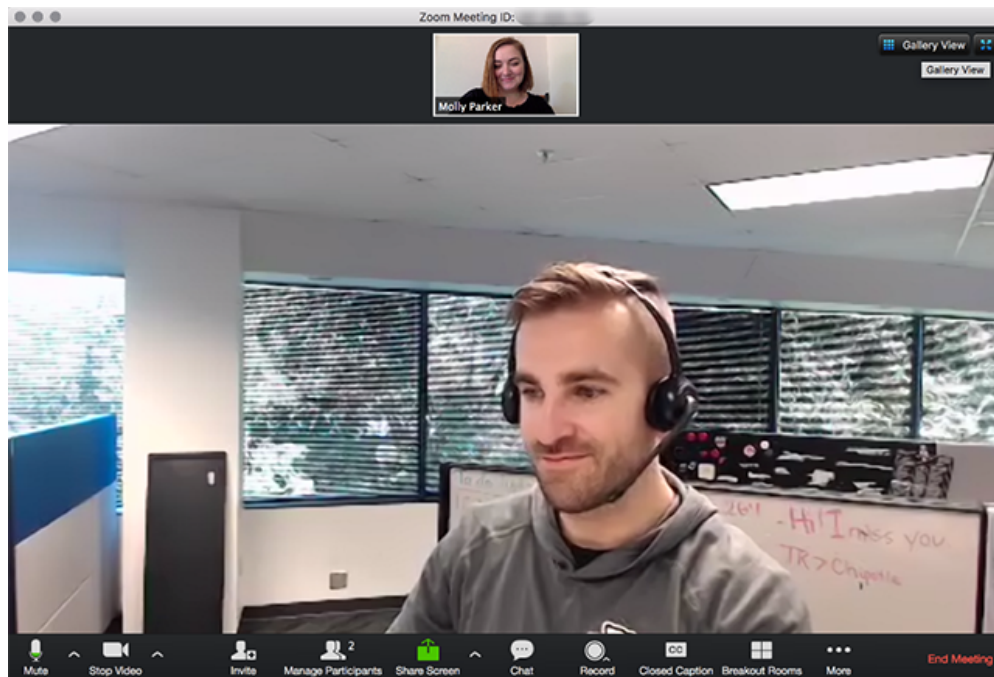
- Here, you can click **Rename** to change your display name (the name that appears in the corner of your video), or **Add Profile Picture** to upload an image from your computer to represent you at times when your video is not visible.

## Navigating Zoom

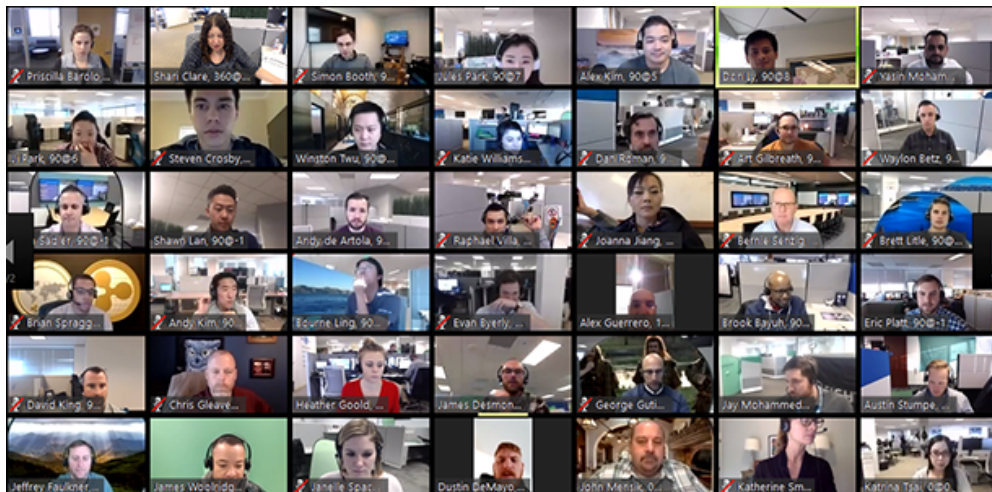
There are two main parts to the Zoom interface that all users should be aware of: the gallery and the toolbar. While specific aspects of them may vary from account to account, there are many consistent features.

- **Video Layout:** There are three video layouts when no one in the meeting is screen sharing: Active Speaker View, Gallery View, and floating thumbnail window. Any of these layouts can be used in full screen or windowed mode, with the exception of the floating thumbnail view. To switch between Active Speaker View and Gallery View, click Speaker View or Gallery View in the top-right corner of your Zoom meeting window.
  - **Active Speaker View:** Active Speaker View will switch the large video window between who is speaking with 3 or more participants in the meeting. If it is just you and one other participant, your video will be smaller at the top and their video will appear below. We recommend using this view during presentations so that you can focus on the presenter.





- **Gallery View:** Gallery View lets you see thumbnail displays of participants, in a grid pattern, which expands and contracts as participants join and leave the meeting. Depending on your computer speed, you can display up to 49 participants in a single screen of the gallery view. If more than 49 attendees are in the meeting, 49 thumbnails are displayed on each page. Click the right or left arrows in gallery view to display the next 49 participants. We recommend this view for discussion sessions so that you can see as many participants as possible.



- **Full Screen:** You can switch any of the layouts (except the floating thumbnail window) to full screen mode by clicking Enter Full Screen at the top-right corner

of your Zoom window. You can exit full screen by clicking Exit Full Screen in the same location or using the Esc key on your keyboard.

- **Floating Thumbnail Window:** The floating thumbnail window allows you to minimize the Zoom video, but keep it on top of other applications you have open. You can move the window around your screen as needed, or hide the video entirely. To switch to floating thumbnail view:

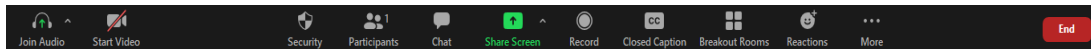
- Click on the minimize icon, located at the top-right corner for Windows, or top-left corner for macOS.
- Once in mini-window view, you can collapse the video by clicking on the arrow on the left side. Click the arrow again to expand the video thumbnail.



- To close the floating thumbnail window, click the arrow on the right side.

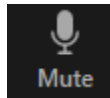


- **Toolbar:** Zoom has a main toolbar that is typically found at the bottom of the Zoom window, though it may also be found at the top. Depending on your settings, you may need to move your cursor to the bottom or the top of your screen to reveal the toolbar. These are your main controls for the meeting. Controls may vary. Below is an image of a standard Zoom toolbar for hosts:



From left to right, the tools are:

- **Join Audio:** This icon appears when your audio source is not yet connected to Zoom. When you click **Join Audio**, it should connect your audio to Zoom, and the icon will change to one that allows you to mute or unmute your audio:



- **Start Video:** This icon is present when your video is not yet on. When you click this button, your video will be visible to all other participants.
- **Security:** Hosts will have this icon on their toolbar, allowing them to access security controls.
- **Participants:** Opens a list of all participants' names.
- **Chat:** Opens a window in which participants can engage in text chats publicly and privately.
- **Share Screen:** Allows participants to share what is on their computer screens. Use Share Screen to play AV files. Typically, the host controls access to this function, so make advance plans with your session chair/host to provide access to screen sharing and to discuss cues and who will manipulate the controls.

**Note:** If you're sharing audio via Share Screen, you must specifically change the Zoom setting; see

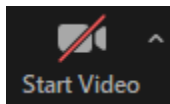
<https://support.zoom.us/hc/en-us/articles/201362643-Sharing-Computer-Sound-During-Screen-Sharing>



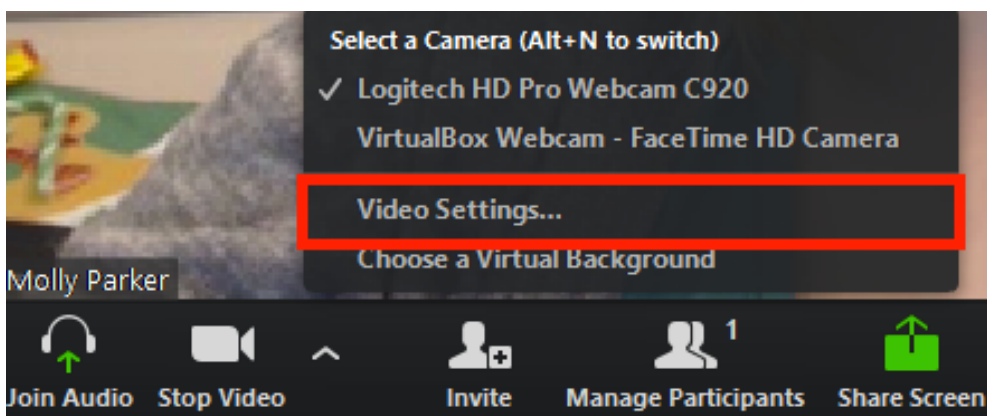
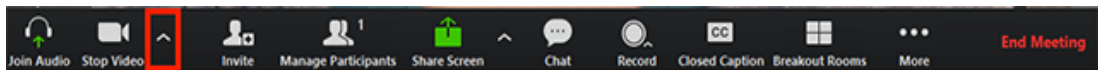
- **Record:** Allows hosts to record video and audio of the session. This is not necessary, since the conference platform will create recordings of conference sessions as planned.
- **Closed Captions:** Allows hosts to assign participants to create closed captions.
- **Breakout Rooms:** Allows hosts to initiate smaller breakout sessions within the main meeting.
- **Reactions:** Allows participants to select an applause or thumbs up icon that will then display within their video frame for a short amount of time as a nonverbal reaction.
- **More:** Adds ways to connect Zoom to social media.
- **End:** Ends your participation in the meeting. Hosts will have the option to end the meeting for all participants.

## Setting Up Your Video

- If you do not see yourself on your screen after joining Zoom but wish to be visible during the meeting, move your mouse cursor down to the bottom of the screen and a toolbar should appear with multiple icons (if it is not already visible). Click the icon of a video camera with a line through it labeled **Start Video**. Follow any prompts from the program until you are visible on your screen.



- If you are still unable to see your video, you may need to check that you are using the right camera. Navigate to your toolbar, which will be either at the top or bottom of your screen. You may need to move your cursor to the top or bottom of the screen in order to see the toolbar.
- Click the arrow next to **Start Video** or **Stop Video**.



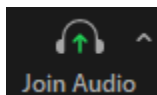
- Select **Video Settings...**

- Zoom will display your camera's video and settings, indicating what camera it is using in case your computer has multiple video inputs.
- If you don't see your camera's video, click the drop-down menu and select another camera.

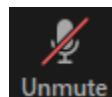


## Setting Up Your Audio

- If you are not sure if your microphone is connected to your Zoom broadcast, move your mouse cursor down to the toolbar at the bottom of the screen. If there is an icon on the far left labeled **Join Audio**, you are not yet connected. Click this icon and follow any prompts to make sure your audio is connected.



- If there is an icon of a microphone with a line through it labeled **Unmute**, you are muted. Click on this to unmute your microphone.



- You will know you are successful if the icon changes to an icon of a microphone labeled **Mute**.

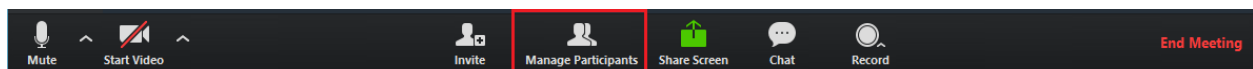


- Another way to know if you are muted is that there will be a red icon of a microphone with a line through it next to your name or username in the lower corner of your Zoom window. This icon indicates that you are muted, and will need to take the above steps in order to unmute your microphone.
- If you are having trouble hearing others' audio but they are not muted, be sure that your computer's volume is up.

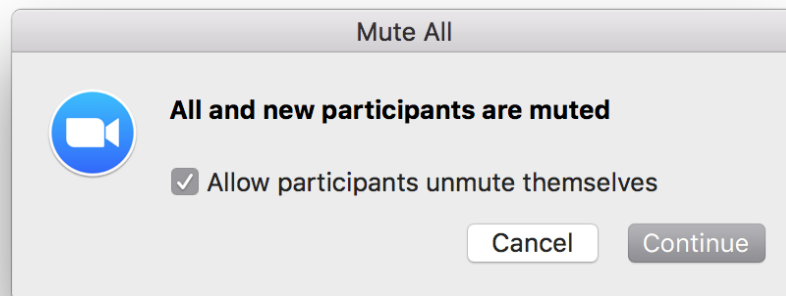
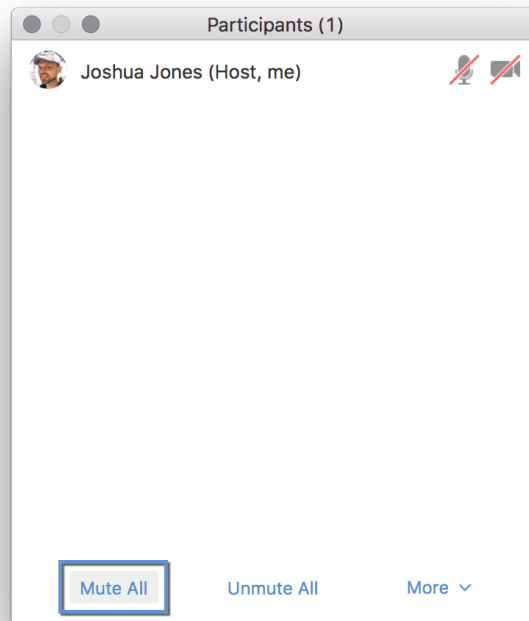
## Muting and Unmuting Participants

Zoom hosts and co-hosts, roles typically assigned to chairs and moderators, have the ability to manually mute and unmute participants either en masse or individually, which can be helpful when participants are struggling with or forgetting to use their own tools and causing disruptions.

- **Muting/Unmuting All:** Select **Manage Participants** from your toolbar.



- Select **Mute All** or **Unmute All**.
- If you are muting all, you will have the option to select or deselect an option to **Allow participants to unmute themselves**. Make sure this is checked so that your participants still have the option to unmute themselves as needed. Clicking **Continue** will mute or unmute all current and new participants.



- **Selective Muting and Unmuting:** The host can mute or unmute individual participants in two ways.
  - Clicking with the right mouse button on a participant's video portrait will open a drop down menu that includes an option to Mute or Unmute the participant. When selected, this option will immediately change the participant's setting. Hovering over a participant's name in the list of participants will reveal a Mute or Unmute option that the host can select to immediately change the participant's setting.

## Communicating with Hosts and Other Attendees

In a virtual discussion, there are ways for hosts and attendees to interact without having to interrupt other participants or worry that you will be overlooked, especially in larger meetings.

- **Using participant list icons:** All attendees have access to a list of participants' display names, which they can access by clicking the **Participants** button on the toolbar.



You may use features of this list to non-verbally signal your needs or an interest in speaking.

- At the bottom of the list are a number of icons that participants can use to non-verbally signal responses like *yes*, *no*, *go slower*, *go faster*, or *raise hand*.



yes



no



go slower



go faster



more



clear all

- As a participant, you can simply click on the icon for the feedback of your choice and it will appear beside your name in the list of participants. In the below example, a participant has signaled a request for the speaker to go slower. Speakers may not notice this feedback, though, unless a moderator chooses to focus on it.



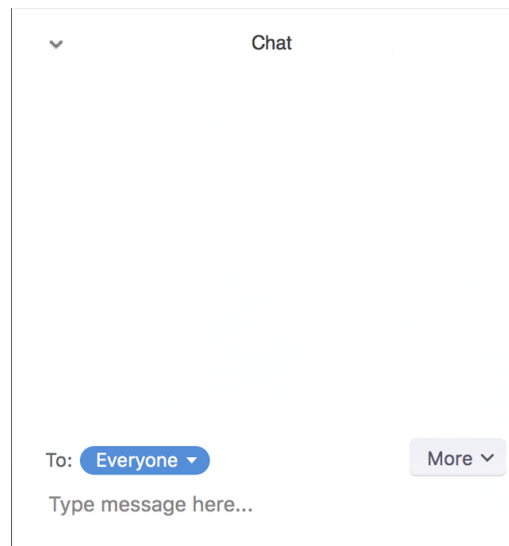
Adriane Pontecorvo



- **Using chat:** Zoom's chat feature allows all participants to type messages to one another publicly or privately. To open the chat while in a meeting, click **Chat** in the meeting controls.



- This will open the chat on the right. You can type a message into the chat box or click on the drop down next to To: if you want to send a message to a specific person.



- When new chat messages are sent to you or everyone, a preview of the message will appear and Chat will flash orange in your host controls.



Sources:

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