Examination of doctoral degrees: Guidelines for holding oral defences with Microsoft Teams

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1 Preparation of the oral defence by the chair of the examination board

1.1 Setting up a meeting for the public part of the oral defence

Meetings for one-off events can be created in Microsoft Teams by clicking on the calendar on the left navigation pane. Confirm a two-hour time slot in the calendar and enter the title of the meeting (Oral defence of doctoral thesis for Mr/Ms…) into the form that is displayed. You can then invite the members of the examination board and the candidate as participants to the meeting. It is recommended that you enter your own email address under 'Optional'. You can also enter a description for the meeting such as 'Public part of the oral defence'.

Important: You must confirm and send the invitation by clicking 'Send' before you can adjust any further settings. The examination board and candidate will receive an automatic notification email inviting them to confirm their participation. If you enter any changes to the meeting form, such as rescheduling the meeting, you can confirm your changes by clicking 'Send Update' (top right). The committee and the candidate will be notified automatically.

Configuring meeting options: In the next step, the organizer (chair of the examination board) will determine which participants are assigned the presenter role. By clicking on the meeting that you have already set up in the calendar, the meeting form will be displayed again but this time 'Join Microsoft Teams Meeting' will be displayed at the end of the form with 'Meeting Options' below this. To access the meeting options, right click on the text and select 'Open Link' (or click the settings icon (three dots) on the top bar of the form and select 'Meeting Options'). Once you have logged in with your UdS account, you can configure the meeting options. The two options related to callers can be ignored, however it is important to adjust the following settings:

- 'Who can bypass the lobby?' In most cases, this should be set to 'People in my organization' but this can also be set to 'Everyone'.

- 'Who can present?' This should be set to 'Specific people' and at least the candidate must be added here as they are holding a presentation (you can also add other members of the examination board so that they are able to provide assistance in the event of interruptions or technical problems.' Attendees who join the meeting during the public defence may be required to wait in the lobby depending on the selected setting (see above).The meeting presenter will be informed that attendees are waiting in the lobby and the attendee will only be able to join the meeting once the presenter has clicked 'Admit'. In the event of disruption

to the proceedings, participants may be muted or in extreme cases, banned from the meeting. Important: You must save any changes that you have made to the settings.

1.2   Setting up a private conversation for the consultation of the examination board

Click 'Chat' on the left navigation pane and then click on the pen icon labelled 'New Chat' on the top blue bar. Now you can add the members of the examination board to the chat (make sure that you do not inadvertently invite the candidate!) Once you have added the chat, you can schedule it as a meeting (click the calendar icon on the bar at the bottom). This will display the meeting form and you can enter the meeting title [for example 'Examination board consultation (private)'] and the meeting time (example: if the oral defence is planned from 2–4 p.m., enter '3–4 p.m.'). It is recommended that you enter your own email address under 'Optional'. All participants will be notified by email when you click send.

1.3   Inviting members of the public by publishing the link to the oral defence

In the calendar, click on the oral defence meeting that you created in 1.1 to open the meeting form. After right clicking 'Join Microsoft Teams Meeting' at the bottom of the form, click 'Copy Link' and send this link by email to the Doctoral Studies Office / Deans Office.

The full link that can be clicked on or copied must always be included in the public announcement of the oral defence. A short link, that would be easier to copy from a printed announcement on a notice board may be created by converting the full link through a publicly available URL shortening service such as bitly.com. This can be done by the chair of the examination board. The full link and the short link must be sent to the Doctoral Studies Office / Deans Office for inclusion on the invitation.

These links may be used to invite guests and members of the public to the oral defence who do not have a HIZ account, such as family members or friends. Recipients can either click on the link or enter the link into a web browser and choose whether they would like to download Teams or open the link in the web browser (preferably Microsoft Edge or Chrome as Firefox users have reported problems).

Important: If the oral defence is organized by creating a team rather than organizing a meeting, the seven-digit team code is not suitable for inviting guests and members of the public to the meeting. Guests cannot participate by using a team code. Saarland University also requests that teams are not created for individual events as they are not designed for this purpose.

1.4   Further technical preparation

a) In addition to responding orally during the discussion, candidates should also be given the option of being able to draw a diagram or write something if they would like to do so. As presenters can share their screens, there are several options for showing notes or diagrams such as a) using a laptop with an electronic stylus b) connecting another mobile device with an electronic stylus or c) directing a camera towards paper notes or drawings. Options a) and b) are recommended, option c) requires good lighting and a camera with a sufficient resolution.

b) Once meetings have been set up for the public and private part of the oral defence, they can be used as templates in a trial run for the candidates and the examination board to familiarize themselves with the technical procedure. We conducted a trial run before the scheduled meeting (by simply clicking on the meeting in the calendar) and tested the following scenarios:

- The candidate shares a PowerPoint presentation (this could be any presentation) with the examination board.

- The candidate draws something or writes a formula.

- The examination board switches from the public meeting to the private examination board chat without closing the public meeting and switches back to the public meeting again.

c) To ensure communication in the event of technical problems, the chair of the examination board may exchange telephone numbers with the candidate and the members of the examination board beforehand.

2   Conducting the oral defence

a) After welcoming and introducing the candidate and members of the examination board, the chair of the examination board will explain the following rules of the procedure:

- All attendees except for the candidate and the members of the examination board must switch off their cameras (the candidate must always remain visible and be able to see the members of the examination board. This can be done by using the 'pin' icon in Teams next to the names in the meeting window.

- All attendees must deactivate their microphones, apart from the person who is currently speaking.

- Members of the examination board may request to speak by using the 'Raise your hand' option. If requests to speak need to be recorded (in the correct order), the chat function may also be used: Members of the examination board who wish to request to speak should type a 'w' in the chat field on the right and the chair can allow them to speak.

- The chair of the examination board should inform all attendees that the meeting is an examination and that assistance and positive or negative feedback is not permitted (either via microphone or via the chat feature which must be monitored by the members of the examination board).

- Recording the meeting is not permitted (if anyone starts a recording from Teams during the examination, users with a presenter role will see this and can deactivate the recording).

b) After the presentation and the discussion, the chair will ask the candidate and members of the public not to leave the meeting but to wait until the examination board returns after their consultation. (Clicking the meeting entry on the calendar or selecting the chat that was set up previously, and then moving the mouse, will display an option on the screen for returning to the previous (public) meeting to announce the results.) Experience so far has shown that the public meeting room is often silent during the consultation.

3   Examination minutes and signing procedure

1.1. In the event of a technical problem which affects the examiner who is recording the minutes, the chair of the examination board should also note key points of the discussion.

1.2. Members of the examination board who are present at Saarland University must subsequently sign the examination minutes and the record of the grade awarded (for example via a circular letter). If the examination board includes external members or individuals who are not local to the university, a scan of the document, which has been signed in part by the other members, should be sent to these members electronically. These members should then sign this document, rescan it and return it electronically to the chair of the examination board (the original handwritten signature on paper is not required). The chair of the examination board should send the original version signed by hand and the scanned version to the Doctoral Studies Office / Deans Office.

4   Organizational information from the Doctoral Studies Office / Deans Office

The chair of the examination board should create the link for the public meeting at least two weeks in advance of the examination date and send it to the Doctoral Studies Office / Deans Office so that the link can be included in the public announcement.

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