

Workflow for the Open Science Conference (OSC) session

(OSC 1-4, Monday, 6th July – Tuesday 7th July, 2020)

The OSC session will take place as a Webinar in Zoom. There will be two volunteers (a **Zoom Technician** and a **Chat Monitor**) to help moderate each session. We will put you in contact with the volunteers assigned to your session by Thursday, 02.07.2020 latest.

Before the session starts

A day or two before the session starts, the chair(s) and the volunteers will receive the link to the Nextcloud folder with the talks in his/her session already in the right order. If there are talks missing, it implies that those talks have been cancelled. During cancelled talks, the session is paused in order to not change the session schedule for the following talks.

15 minutes before the session starts, the **Zoom Technician** will log in as a host via the iDiv Zoom license assigned to that session (we will provide the respective credentials to the Zoom Technician and the chair(s) (in case of technical issues) before the conference starts).

Session **chair(s)**, the **Chat Monitor** and all **speakers** should also join the meeting 15 mins prior to the official start of the session by clicking on the Zoom link provided in the Chat of the respective session in AccelEvents (the virtual platform we are using). Please, use the Zoom application (following the link) instead of the embedded version, as we noticed that the video and audio quality might be better.

The **Zoom Technician** then gives the chair and the Chat Monitor co-host status and then assigns “panellist” status to all speakers. The **Zoom Technician** has to unmute the speakers. The **speakers** should inform the chair before the meeting starts if they would like to introduce themselves live before the recording starts playing or if they already included the introduction in the recording.

All other participants will automatically be assigned “attendee” status when they join the meeting at the official starting time. The Zoom Technician will allow attendees to only be able to contact the hosts and the panellists via the chat box (in the chat box, allow attendees to chat only with hosts, co-hosts, and panellists). The chat can therefore only be used for contacting the hosts/co-hosts/panellists for technical issues. Attendees cannot chat among each other. Questions to the presenters in the chat will not be answered.

All attendees are automatically muted upon entry into the meeting. They can only be unmuted by the hosts/co-hosts.

Both **Chat Monitor** and **Zoom Technician** will make sure that the session is recorded (the meeting is set up so that the recording starts automatically at the beginning of the meeting and ends when the meeting is ended). If, for some reason, the meeting is not being recorded, the Zoom Monitor and the Zoom Technician will activate the recording function in Zoom (the audio of the Chat Monitor and the Zoom Technician must never be muted or else the audio will not record!).

The meeting starts

The chair opens the session.

The **chair** will name the first speaker and ask him/her to introduce him/herself live (if not done on the pre-recording yet). When the speaker has finished the introduction, the chair will play the recording from Nextcloud by sharing his/her screen.

After the talk, the **Chat Monitor** will look who raised his/her hand and ask the person to ask his/her question; the person to ask the question has to be unmuted by the **Chat Monitor** and muted again after the question has been answered; this is repeated until the time for questions is up. The **chair** keeps an eye on the time and interrupts the Q&A session when the time is up.

In the case that nobody used the raise hands function, the **chair** will read one question in the Q&A box out loud. **Speakers** [panellists] can answer Q&A questions in writing any time in the Q&A box during the session or afterwards via the chat tool / Q&A in AccelEvents) and lets the respective speaker answer the question until the time is up.

When the time for questions is up, the **chair** will ask the next speaker to introduce him/herself and the **chair** will share his/her screen again to play the next pre-recorded talk. During the entire session, the **Chat Monitor** also monitors the chat box for attendees to ask the hosts or the panellists questions related to technical issues. The **Zoom Technician** will end the webinar at the end of the session by clicking on "end the meeting for all".

When the session has ended

The recording will automatically end when the meeting is ended by the **Zoom Technician** and uploaded to a cloud that the organizers will access later to add the recording to the respective session in AccelEvents.

Workflow for the All Hands and project Meetings

(Tuesday 7th, Wednesday 8th, July 9th and July 10th)

The All Hands meetings and project meetings will take place as a regular Zoom meeting.

If a volunteer is required for the meeting, the **volunteer** will log in as a host via the iDiv Zoom license assigned to that session and give the host/co-host rights to the chair(s). If no volunteer is required the credentials will be shared with the **chair(s)** so that they can log in as the **host** (it is possible to change the status in Zoom at any time).

The **host** can create breakout rooms and assign participants to it as needed.

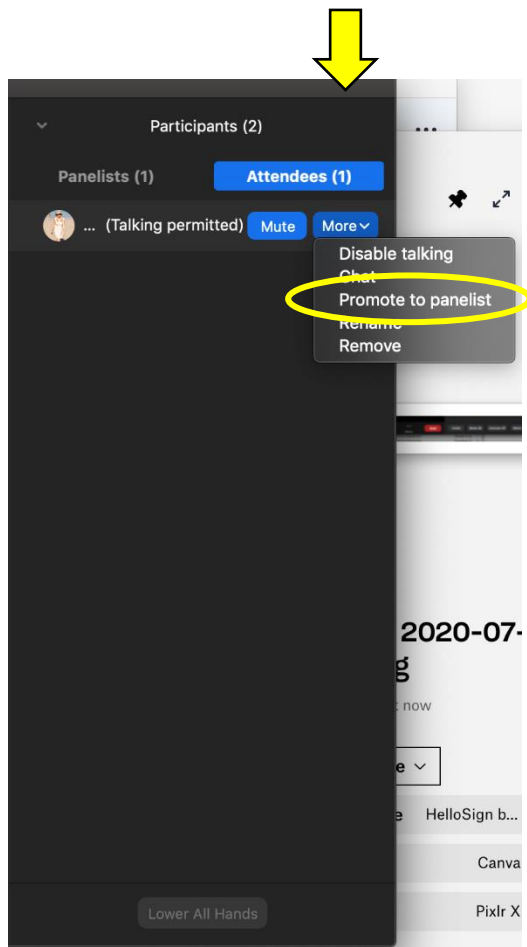
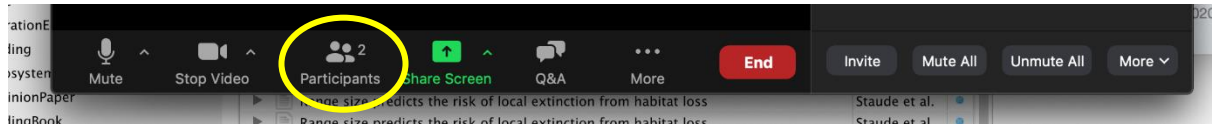
If you are a volunteer, these are your tasks:

Zoom Technician

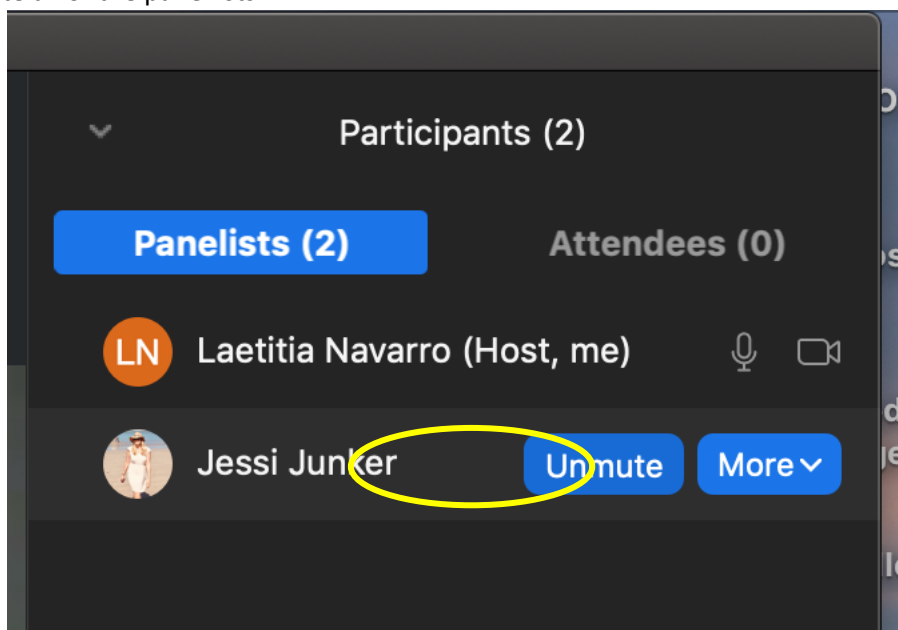
- Install Zoom on your computer
- Join the meeting using the credentials provided by the organizers, click “Start this Meeting” in Zoom
- Copy and paste the Zoom link in the AccelEvents chat box so other will also be able to join via the application

The image shows two screenshots. The top screenshot is the Zoom 'Manage Meeting' page for a meeting titled 'Test Meeting'. It displays the meeting ID (929 8879 0842) and a meeting password (***** Show). The 'Invite Link' is circled in yellow and points to a large yellow arrow. The bottom screenshot shows a chat window for 'GEOBON Open Science Conference & All Hands Meeting'. The chat history shows a message from Annika Zuleger with a Zoom link (zoom.us/j/9224957...) and a 'Join our Cloud HD Video Meeting' button, which is also circled in yellow.

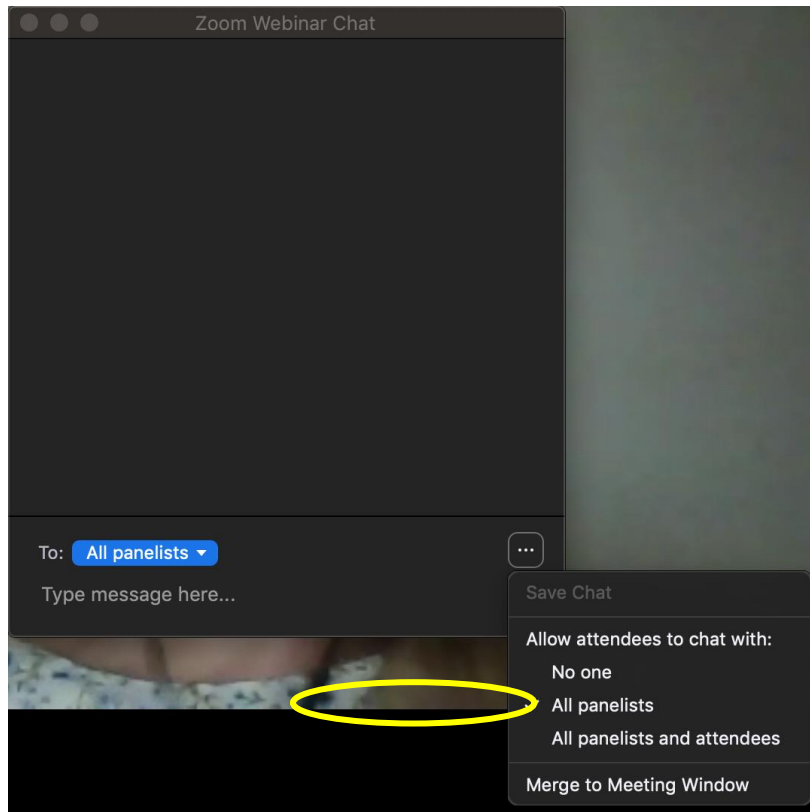
- Make sure you are in a quiet place during the session!
- Never mute your audio during a session or else the session recording will be without audio
- Join the meeting 15 mins prior to the official start of the session
- Promote the chair and the Chat Monitor as a panellist, then give co-host status to the chair and the Chat Monitor, then unmute them



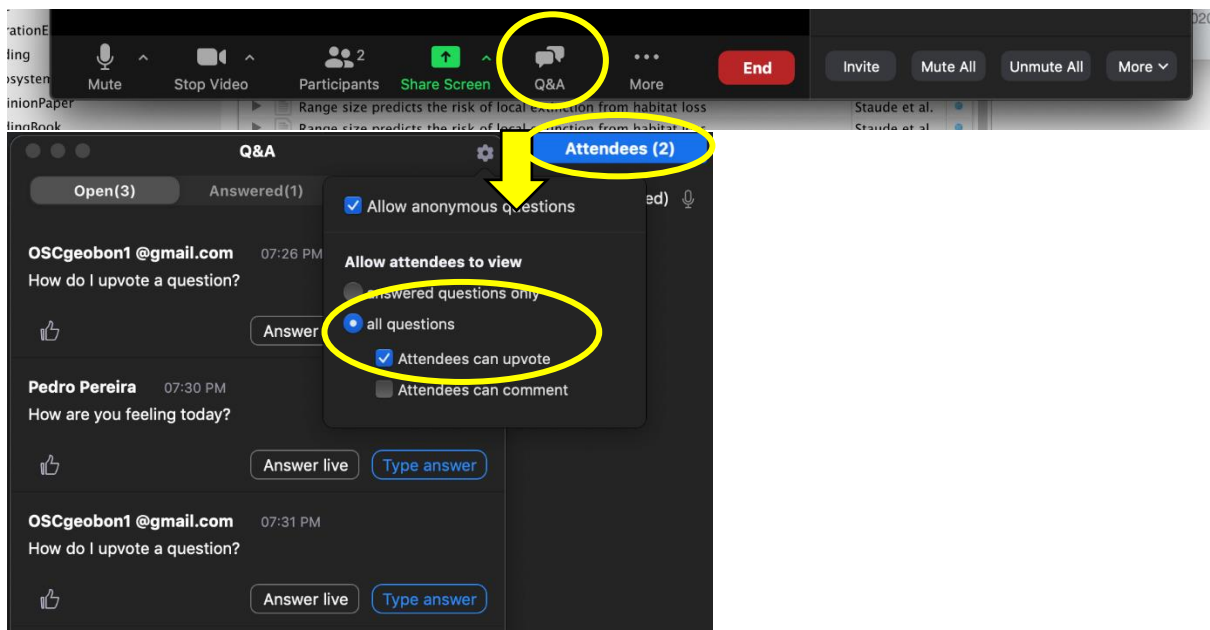
- Assign panellist status to all speakers
- Unmute all of the panellists



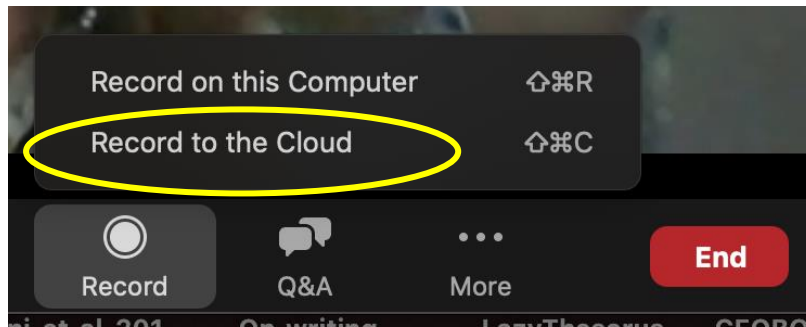
- Set the chat box settings so that the attendees are only able to chat with the panellists (this also includes the hosts and co-hosts), but not with one another.



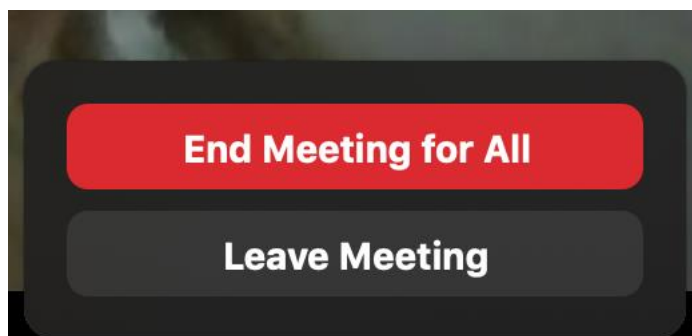
- In the Q&A, make sure that the setting is such that the attendees can see all questions and upvote questions. Do not allow attendees to comment on questions in the Q&A.



- Make sure the recording function in Zoom is activated (your audio must never be muted or else the audio will not record!). If not, activate “Record to the cloud”



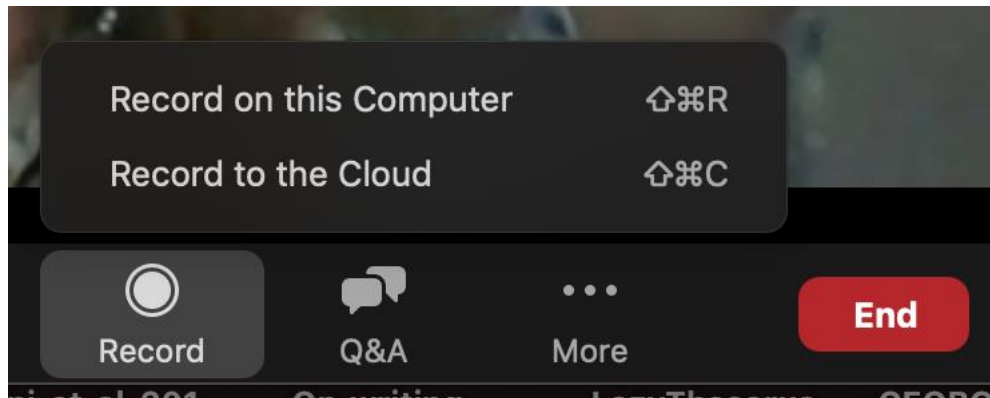
- End the meeting when the session is over



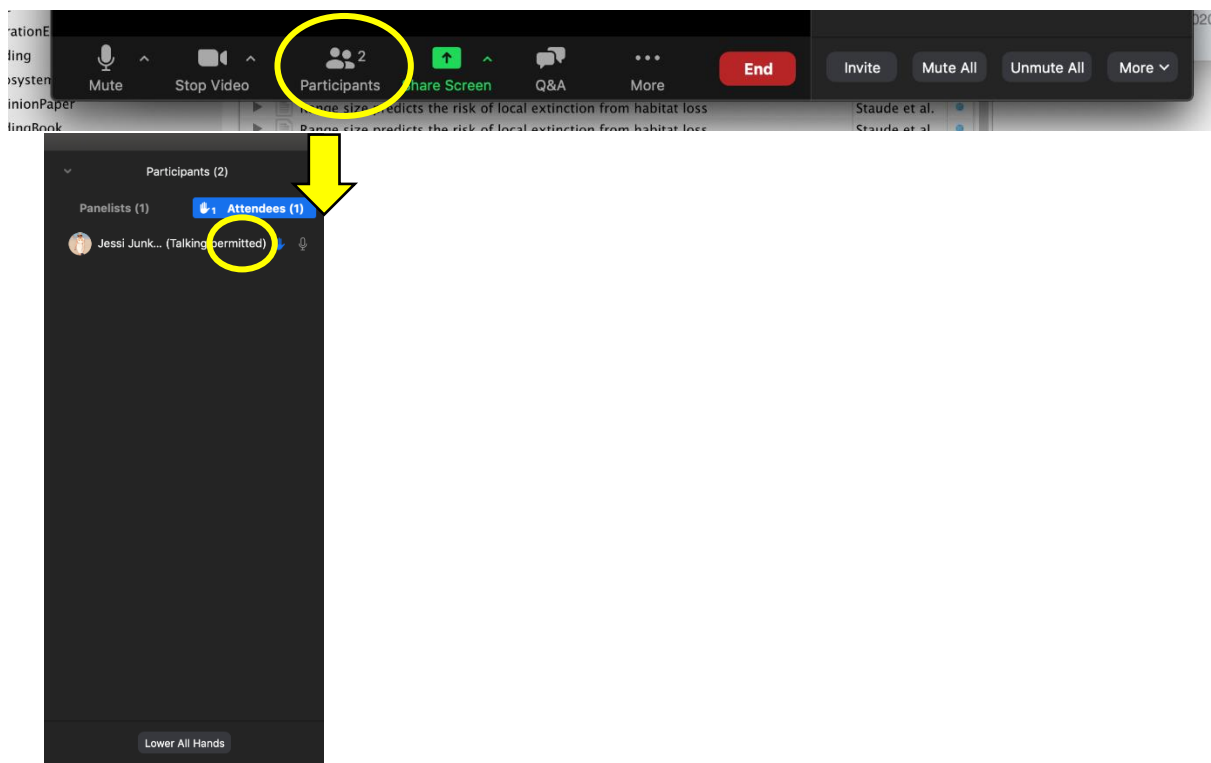
- The recording will automatically end when the meeting is ended by the Zoom Technician and uploaded to a cloud that the organizers will access later to add the recording to the respective session in AccelEvents.
- **Make sure that you log yourself out of the OSCgeobon Zoom account again when the meeting has ended** or else the license won't be available for the next session!
- Contact the organizing team in case there is a technical issue (preferably via WhatsApp)

Chat Monitor

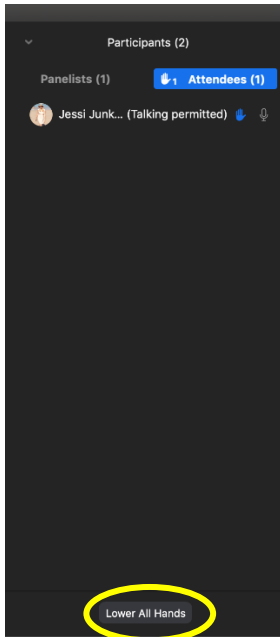
- Install Zoom on your computer
- Make sure you are in a quiet place during the session!
- Join the meeting 15 mins prior to the official start of the session
- Make sure the recording function in Zoom is activated (your audio must never be muted or else the audio will not record!). If not, activate “Record to the cloud”



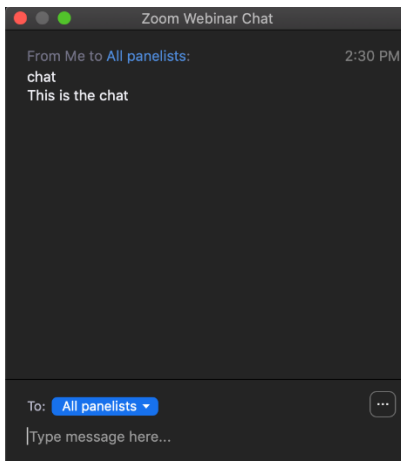
- Never mute your audio during a session or else the session recording will be without audio!
- After each talk, look who raised his/her hand



- Unmute the person who raised his/her hand
- Ask the person who raised his/her hand to ask a question
- Mute the attendee afterwards again
- Moderate questions and answers until the time for questions is up
- Lower All Hands once the time for questions is up



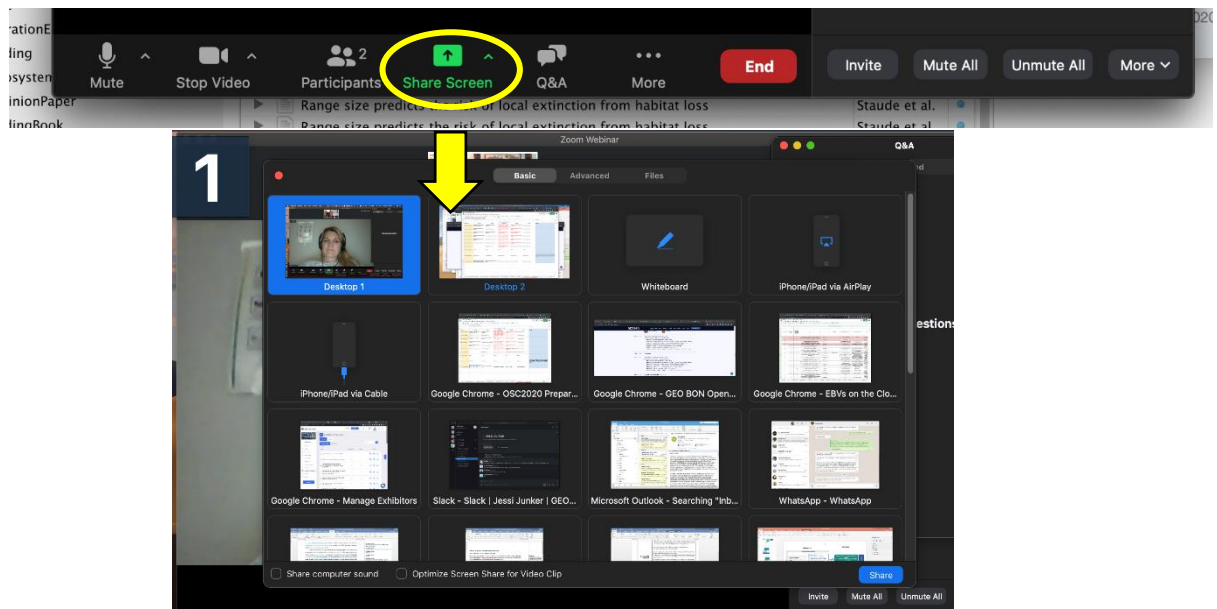
- Monitor the chat box to check for any important messages on technical issues during the session



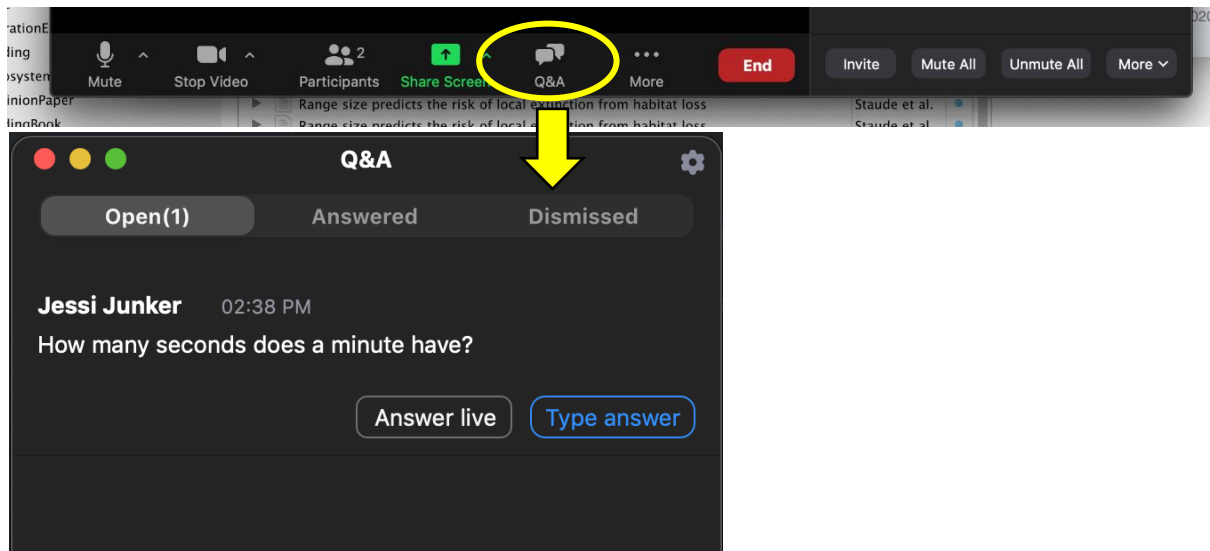
- The recording will automatically end when the meeting is ended by the Zoom Technician and uploaded to a cloud that the organizers will access later to add the recording to the respective session in AccelEvents.
- Contact the organizing team in case there is a technical issue (preferably via WhatsApp)

If you are a chair, these are your tasks:

- You will receive the link to the Nextcloud folder with the talks in your session already in the right order
- Install Zoom on your computer
- Make sure you are in a quiet place during the session!
- Join the meeting 15 mins prior to the official start of the session
- You will be given co-host status by the Zoom Technician
- Ask/note down for each speaker if they want to introduce themselves live before the talk or if they already did that in their pre-recording
- Briefly explain to the attendees how the session will be run and how the Q&A will work (we will provide you with a summary slide that can be shared at the beginning of the session and between each talk).
- Name the first speaker and ask him/her to introduce him/herself live (if not done on the pre-recording yet - the speaker will let you know in the 15 mins before the meeting starts)
- When the speaker has finished the introduction, share your screen and play the speaker's pre-recorded talk from Nextcloud



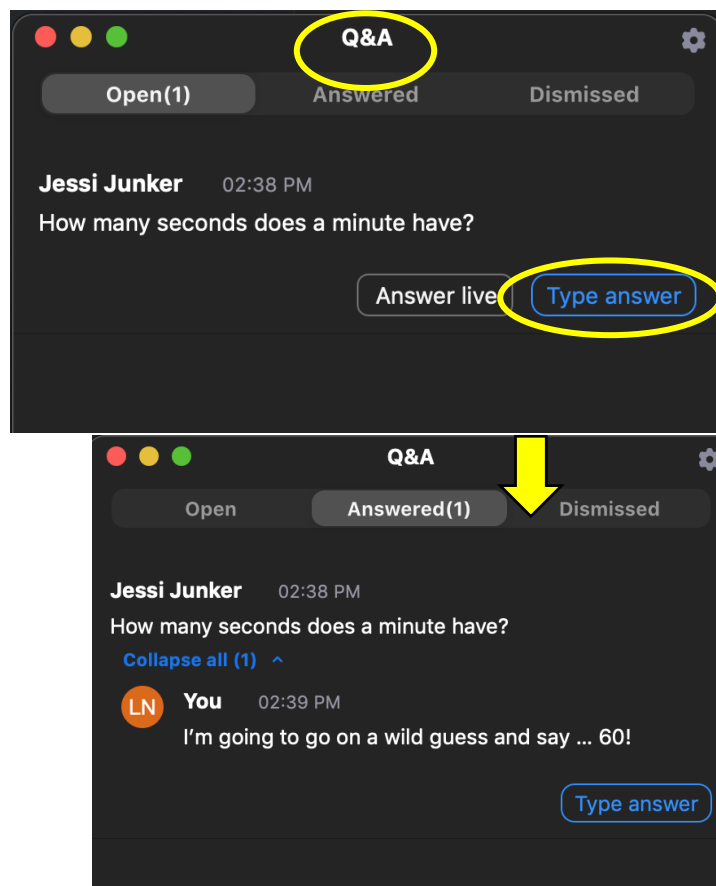
- If nobody used the raise hands function, read one question in the Q&A box out loud and let the respective speaker answer the question; do this again until the time is up



- Keep an eye on the time and interrupt the Q&A session when the time is up
- Ask the Zoom Technician to end the webinar when the session is over

If you are a presenter, these are your tasks:

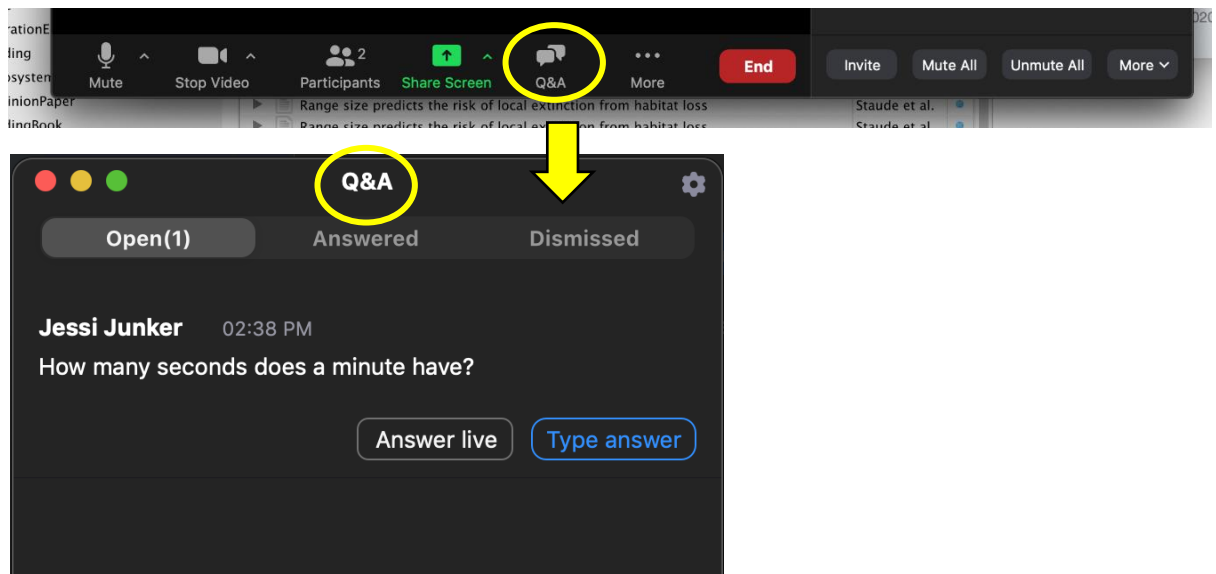
- Install Zoom on your computer - You can use the Zoom version embedded in AccelEvents but the quality is less good. We therefore advise you to use the external Zoom application.
- Make sure you are in a quiet place during the session - you will be speaking live during the introduction and the Q&A session after your talk.
- Join the meeting 15 mins prior to the official start of the session
- You will be given panellist status by the Zoom Technician (host)
- Let the chair know if you will introduce yourself live or not (you do not need to introduce yourself live if you already introduced yourself in the pre-recording)
- Briefly introduce yourself when prompted by the chair (if you did not already introduce yourself already in your pre-recording)
- Answer questions asked live by attendees after your recording finished playing and until the time for questions is up (the Chat Monitor will moderate the Q&A session; the chair will remind you when the time is up)
- Answer additional questions in writing that were posted to you by attendees in the Q&A box during the session.



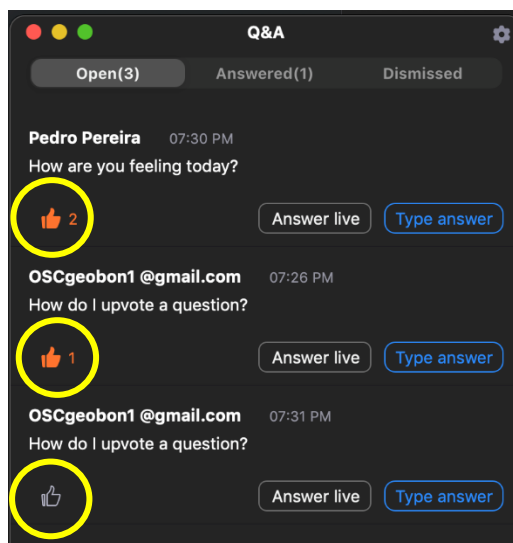
- You can also chat to attendees *after the session* via the chat tool in AccelEvents
- You may upvote questions already listed in the Q&A (thumbs up)

All conference attendees - these are your tasks/options:

- Close all other software during sessions/meetings
- Make sure that the Zoom name displayed on the screen is actually your name, if not, please change the name accordingly; this is important for asking questions (so that the presenter knows who asked the question) and for the chairs to identify the speakers, volunteers, etc.
- Use the "raise hands" function in Zoom (at the bottom of your screen) to ask live questions during Q&A sessions; once you have raised your hand, you may be prompted by the co-host to ask your question to the presenter if time allows
- Please also use the Q&A tool in the Zoom webinar to ask questions to the presenters in writing; make sure that with each question you ask, you indicate the name of the presenter that you are asking the question to (i.e., to Jessi Junker: how do we upload our talks?)



- You may upvote questions already listed in the Q&A (thumbs up)



- The chat can only be used for contacting the hosts/co-hosts for technical issues. Questions to the presenters in the chat will not be answered.

Trouble shooting

Potential issues	Solution
A speaker's recording is not available in the Nextcloud folder	This means that the speaker has not uploaded his/her video. If the speaker is present, he/she can do a live presentation. If it doesn't work, or if the presenter is not present, announce that the talk is cancelled. The session takes a break for the length of the talk + questions and resumes with the following talk at the time indicated in the agenda.
One of the speakers is not present during the session	This is unfortunate but the good news is that we should have the recording of the speaker's presentation. You can invite the attendees to write questions for the speaker in the AccelEvents page of the session and the absent speaker will be invited to address them afterwards. When the recording finishes, do not invite the next speaker immediately but wait until the time indicated in the agenda.
I'm a volunteer and I lost my internet connection	Do not worry, this is why we did our best to have two volunteers per session. The other volunteers should inform the organizers via WhatsApp. Join the session again when possible.
The chair(s) has/have lost his/her/their internet connection	In most cases, show must go on. Inform the organizers via the WhatsApp Group. Each session should have more than one chair and this will be one of the reasons why.
The AccelEvents platform is down	Chances are the organizers are aware of it and addressing the issue. But inform us via WhatsApp anyway.
Some attendees cannot join the Zoom call	Our zoom licenses are limited to 100 participants for the regular sessions and 500 for the plenaries. It is very unlikely that they will be used completely but that may be the reason why some participants can no longer join. This uses a first come, first served basis which is also why Chairs, Volunteers and presenters must log in the Zoom webinar at least 15 min. before the session starts.
An attendee is making weird/inappropriate comments on the chat/Q&A	Contact the organizers immediately and we will take it from there. Note that as host/co-host, you can always mute attendees, and make the chat only visible to the presenters ("panelists").
A presenter is answering questions but we cannot really hear him/her	In that case, politely interrupt the presenter and invite him/her to type his/her answers in the Q&A box instead.
My fellow volunteer has lost his/her internet connection	For the time being, you'll have to fly solo but don't worry, you know what to do. Do inform the organizers via WhatsApp and we will try and send someone to replace the other volunteer.