

RIMS Guidelines for Organizing Online Joint Research Meetings Using Zoom  
Ver. 2.03

Joint Research Support Section,  
Research Institute for Mathematical Sciences,  
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The guidelines compile the procedure when a principal organizer holds an online joint research meeting outside the Research Institute for Mathematical Sciences (RIMS).

The principal organizer is requested to study the possibility of organizing a joint research meeting online based on the guidelines, communicating with the Joint Research Support Section at RIMS (by email or online meeting). The final judgment whether holding it online is possible or not should be made at least by 30 days prior to the day of the meeting.

The guidelines offer a standard model (with top priority placed on security) and therefore it is not our intention to prevent organizers from familiarizing themselves with the Zoom features and making changes as appropriate.

### **Introduction**

**A paid account for Zoom is required** to organize online joint research meetings. For smoother administration of online meetings, the free version is not recommended as it is difficult to organize online meetings on the free version with many restrictions. For example, the duration of a meeting is limited to 40 minutes maximum, and having more than one host (who manage joint research meetings) is not possible. (The free version is, however, helpful to familiarize yourselves with the Zoom features.)

**If you do not have a paid account, RIMS will prepare one.** Follow the procedure, etc. indicated in the guidelines when organizing online joint research meetings. (Up to 300 persons can join.)

If you own a paid account available, you may organize online meetings on your own responsibility. Take action as appropriate while referring to the procedure indicated in the guidelines, etc.

**Basically, online joint research meetings are closed “workshops”**. If they are switched to open-type “Symposia” (i.e., URLs are openly available so that anyone can freely join), irrelevant outsiders may disrupt online meetings. (This problem is known as Zoombombing.) **It is necessary to manage participants properly for the “workshop” to be held without such problems.**

If you wish to hold an online joint research meeting open to the public (i.e., a URL is posted on the website so that anyone can join a Zoom meeting anytime during a session), consult with our section in advance.

The specific procedure is explained below.

**The details are provided in the two types (indicated in two different colors) of Zoom procedure manuals (“The Manual” hereafter)**, which are attached for reference.

**Blue text: Refer to the host manual for details.**

**Red text: Refer to the guest manual for details.**

## **Terminology, etc.**

### **Organizer**

Organizers have the overall responsibility for joint research meetings. Organizers have **host privileges** of Zoom. Organizers are responsible for the management duties for holding a Zoom meeting (e.g., **admission and removal of participants on the day of the meeting and designation of co-hosts**), identification of prospective participants in a joint research meeting, **sending out invitation emails, management of participants on the day of the meeting**, preparation of a final list of actual participants and editing of Kôkyûroku on their own responsibility, etc.

\* It is strongly recommended to designate a vice organizer(s) or appropriate a co-manager(s) to delegate co-host privileges of Zoom for management.

### **Chairs (chairpersons)**

Chairs facilitate a meeting of a specific section of a joint research meeting. Chairs require **host privileges (as co-hosts)** of Zoom. Chairs are designated as co-hosts by the organizer. Chairs also control duties, such as **receiving questions and allowing participants to speak**.

### **Speakers**

Speakers deliver online presentations and lectures, **using the share features of Zoom to share PDF and PowerPoint images and/or projecting, the actual blackboard/whiteboard with a built-in camera**. Speakers require **host privileges (as co-hosts)** of Zoom. Speakers can be designated as co-hosts by the organizer.

### **Participants**

A participant **joins a meeting by starting Zoom on a PC, tablet, or smartphone**. It is possible to join a meeting without a Zoom account. Participants are not allowed to speak out during a presentation (forcibly muted). **In a Q&A session, a participant uses the (Raise Hand) button** and obtains permission to speak from the chair before asking a question.

### **Who are hosts and co-hosts?**

Hosts and co-hosts refer to persons who have management privileges on Zoom. The main management duties of hosts are as follows.

- Ending a meeting room (Only hosts can end a meeting room while only the RIMS staff can start a meeting.)
- Approving admission of participants and forcibly removing outsiders (Both hosts and co-hosts have these privileges.)
- Forcibly muting or unmuting participants (disabling or enabling their microphones) (Both hosts and co-hosts have these privileges.)
- Delegating host privileges to any other person (Only hosts have this privilege.)
- Designating any other person as a co-host (Only hosts have this privilege.)

### **Default setting for Zoom**

It takes some time to understand the Zoom setting. At first, simply try the following setting recommended by RIMS.

The default setting for Zoom recommended by RIMS is as follows

- Disable the [chat \(private chat\)](#) and [file transfer](#) features.
- Disable the [polling feature](#).
- Enable the [screen sharing privilege](#) only for hosts and co-hosts (organizers, chairs, and speakers).
- Enable the [annotation feature for screen sharing](#) only for hosts and co-hosts (organizers, chairs, and speakers).
- Disable [participants to unmute themselves](#). (Enable this feature only for hosts.)

For others, maintain the standard setting of Zoom.

- \* Organizers who are familiar with Zoom may change the setting as appropriate on their own responsibility. If a special setting is required, consult with us in advance.

The following sections explain the specific actions to be taken by organizers, chairs, speakers, and participants.

## Organizers

The organizer must perform various duties as an overall manager. This section explains the specific actions to be taken and roles to be fulfilled in the time series, from making preparations to holding a meeting.

### Overall schedule (from preparations to the day of a meeting)

#### 0. What to do before the submission deadline of the documents for a research meeting (Deadline: 30 days before the meeting)

The organizer **makes preliminary arrangements** with the person in charge of the Joint Research Support Section at RIMS (“RIMS staff” hereafter) **by email or online Zoom meeting** at least 30 days before the meeting, which is the deadline to submit the required documents for a research meeting, and makes a final judgment to determine whether it is possible to hold an online Zoom meeting for the joint research. The organizer submits **a joint research program (final version)** to the RIMS staff. The organizer confirms the contact information (email address), etc. of prospective participants and applicants.

#### 1. Promptly after 0.

Based on the joint research program and documents submitted by the organizer, the RIMS staff will set up an online meeting using the privileges of the paid account, and obtain an automatically generated URL for pre-registration for joining a meeting room.

(The meeting room should be scheduled to be open at least one hour prior to the actual start time of the research program. This is to have enough time for a briefing with the RIMS staff and to do necessary preparations (e.g., [designation of co-hosts](#)) before it starts.

The RIMS staff will notify the organizer of the generated URL for pre-registration.

#### 2. After 1. until the previous day of a meeting

- (1) The organizer sends out the URL for pre-registration and the joint research program to prospective participants by email (for invitation).

**[Note]** Principal organizers are to assume responsibility for the confidentiality of URLs, IDs, and passwords. It is also strictly prohibited to post such URLs, IDs, and passwords at locations that are accessible to many and unspecified third parties (e.g., websites, social media).

- (2) **Organizers, chairs, and speakers should rehearse using a paid Zoom account of RIMS.** The **Organizer** should make a request to the RIMS staff in advance for a rehearsal to be conducted in the same manner as that on the day of the meeting (as described in 3.). The **Organizer** and the **chairs** should test the host privileges to know how they work. **Speakers** should rehearse checking the presentation methods available on Zoom.

(It is possible to rehearse on a free account with the limited features. It is, however, recommended to use the paid account of RIMS for the rehearsal.)

- (3) **Participants** must click the URL for pre-registration in 2.(1) by the day before the meeting. After pre-registration (e.g., name, affiliation, email address) is completed, the URL (or ID and password) for the online meeting room for joint research is notified by email and on the next screen. Record the URL, etc.

**[Note] Do not share URLs, IDs, and passwords with outsiders. It is also strictly prohibited to post such URLs, IDs, and passwords at locations that are accessible to many and unspecified third parties (e.g., websites, social media).**

3. **On the day of a meeting**

- (1) The online meeting room for the joint research will become available on a paid account. The organizer clicks the URL (or enters the ID and password) for the meeting room notified in 2.(3) and waits in the Waiting Room until the RIMS staff approves his/her admission. After final arrangements are made online on the day of the meeting, host privileges are delegated from the RIMS staff to the organizer.
- (2) The **organizer designates a vice organizer(s), chairs, speakers, etc. as co-hosts** and approves admissions of participants, etc. **before the online joint research meeting starts.**
- (3) **Participants click the URL (or enter the ID and password) for the meeting room notified in 2.(3) to follow the admission procedure.** (Participants are admitted to the Waiting Room temporarily. They are admitted to the meeting room when the host approves their admission.)
- (4) The **organizer (or the co-hosts designated to manage the meeting)** manages the overall situation during the online joint research meeting. The organizer is responsible for checking on the names of participants in the Waiting Room, approving admissions or forcibly removing participants, designating other co-hosts when chairs and speakers are being changed, and ending the online meeting room (ending the online joint research meeting).

- (5) Chairs manage to facilitate the presentations delivered by the speakers and control Q & A sessions after presentations, etc. (e.g., [unmuting participants who raise hands for permissions to ask questions](#)).
- (6) When the online joint research meeting ends for the day, the **organizer ends the meeting room**. (Make sure to select [End Meeting for All] and report the end of the meeting to the Joint Research Support Section at RIMS by email. (The Joint Research Support Section offers support until 17:00.)
- (7) To hold a meeting on the following day, follow instruction in **3.(1)**.

#### 4. **After the end of a joint research meeting**

The **organizer** is asked to submit lists of participants based on the pre-registration data (name, affiliation, position, email address) offered by the RIMS staff along with the lists of participants who would fall into the categories as 'participants from foreign institutes', 'researchers aged 35 or younger', 'researchers aged 36 to 39', and/or female participants.'

- \* Basically, the Joint Research Support Section at RIMS is not responsible for the administration of online joint research meetings explained in sections in **3.** except for (1). During a meeting, **hosts (e.g., organizers [co-managers, including vice organizers] and chairs) are responsible for its administration**.
- \* Note that host privileges can be delegated (from the RIMS staff to the organizer) only when the meeting room is open and that **host privileges are only effective during the meeting** and invalidated when it ends.
- \* When a host (organizer) leaves the meeting for some reason, he/she can **delegate the host privileges to a designated participant** to continue the meeting.
- \* **If the Zoom meeting ends halfway through** (e.g., a host accidentally clicks the **(End)** button when leaving the meeting or the screen blacks out due to a system failure), RIMS staff will open up the meeting room again. **Contact the Joint Research Support Section of RIMS (+81-75-753-7206: kyodo(at)kurims.kyoto-u.ac.jp) immediately.**

For details (e.g., how to send email to participants, how to designate vice organizers, chairs, speakers, etc. as co-hosts, how to approve admission or forcibly remove participants), **refer to the host manual**.

## Chairs

Chairs are designated as co-hosts by the organizer to control the section they are in charge of (management of facilitation, including introduction of speakers and Q&A).

Not only the organizer, Chairs are also required to familiarize themselves with the Zoom features as in the case of the organizer. Read the manual, etc. carefully before an online joint research meeting.

### Standard procedure to hold an online joint research meeting (on the day of a meeting)

- **Example of facilitation of presentations and Q&A**

\* Organizers who are familiar with Zoom may change the settings or procedures as appropriate on their own responsibility.

- [0] The organizer designates **chairs** and speakers as **co-hosts**.
  - [1] The **chair (co-host)** clicks the **(Mute All)** button and unchecks **(Allow Participants to Unmute Themselves)** for all participants (except for the host) so that they cannot speak out freely.
  - [2] **Speakers (co-hosts)** unmute themselves when delivering a presentation.
  - [3] While a speaker delivers a presentation, the **chairs** are responsible for managing the Zoom screen.
  - [4] During a presentation, all participants are muted and cannot speak. **The chair is also muted in principle.**
  - [5] When a presentation is finished, the **chair unmutes him/herself and facilitates Q&A.**
  - [6] **Participants click the (Raise Hand) button** to request to speak out.
  - [7] **The chair** checks the status, **unmutes the participant (who asks a question)**, and asks the participant to speak.
  - [8] The speaker communicates with the participant (who asks a question) for Q&A.
- When the question is finished, go back to [5]. (Move on to the next question.)  
→ When the presentation is finished, go back to [0].

(Start the next presentation.

→ The organizer designates the next speaker as a co-host.)

For details (e.g., how to mute and unmute participants including yourself, explanation of the Zoom screen), **refer to the host manual.**

## Speakers

Speakers are designated as co-hosts by the organizer and deliver a presentation to the Zoom audience (participants) using the share screen features and camera features of Zoom.

Regarding the presentation procedure on the day of the meeting, refer to the procedure written in the section for **Chairs** above.

Presentations are conducted mainly in one of the two methods below.

- (1) Deliver a presentation showing PDF and PowerPoint files using the share screen feature
- (2) Deliver a presentation while showing the image of the speaker and the blackboard/ whiteboard, etc. using the camera of the speaker's PC

For details (e.g., how to use the share feature), [refer to the host manual](#).

## Participants

Participants pre-register following the instructions in the invitation email sent from the organizer and join an online joint research meeting by clicking the URL for the meeting room notified in a later email, etc. Join a meeting at an appropriate timing, referring the program.

Register your real name when joining a meeting so that you are identified correctly.

In Q&A, click the (Raise Hand) button and wait before asking a question.

For details (e.g., how to join an online joint research meeting, how to register your name, how to use the Raise Hand feature when asking a question), [refer to the guest manual](#).



## **Rules that must be observed by all participants of an online joint research meeting**

- Do not share URLs, IDs, and passwords for online joint research meetings with outsiders. It is also strictly prohibited to post such URLs, IDs, and passwords at locations that are accessible to many and unspecified third parties (e.g., websites, social media).
  
- **Outsiders (third parties) may enter without permission and jeopardize the online joint research meetings by engaging in annoying behavior (e.g., activities irrelevant to joint research).**
  
- **The use of an incorrect address may result in information leakage to third parties.**
  
- It is prohibited to record and store the videos and images of presentations, except for recording of presentations within the scope of personal use, etc. It is strictly prohibited to distribute such videos and images at locations that are accessible to many and unspecified third parties.
- Speakers must exercise utmost care in handling of reference materials used as presentation documents. They must implement appropriate measures (e.g., clearly indicating the source).
  
- **Regarding handling of copyright, appropriate measures must be implemented in accordance with relevant laws and regulations.**

Finally, there are two requests to **organizers**.

**Manage participants properly.**

- **Note when inviting participants**

Organizers must send an invitation email to prospective participants before a meeting. Please pay extra care not to send the emails to incorrect addresses. There have been many reports about incidents in which outsiders accessed online joint research meetings and disrupted administration.

When sending invitation emails, make sure to ask participants not to share the information (e.g., URL, ID, password) with outsiders or via social media, etc.

- **Checking participants in the Waiting Room (to the extent possible)**

Participants are sent temporarily to the Waiting Room at first when they click the URL for the joint research meeting (notified by an invitation email and a final email after pre-registration) until the organizer or a person with the host privileges admits them into the meeting room.

The Waiting Room is set up to have chances to confirm those in the Waiting Room are actually the prospective participants, thus to prevent outsiders from entering the meeting room.

When the number of participants is large (e.g., 50 or more), it may not be a practical task to identify each of them and give approval one by one. Although it is unlikely that outsiders could intrude the meetings when the standard pre-registration method of Zoom is taken, we advise to make the arrangements to the extent possible to have two or more co-managers [co-hosts] who have the privilege so that approvals are given properly to right participants, and thus intrusions of outsiders will be prevented.

When there are many prospective participants (e.g., 50 or more), it will require considerable time to give approval to those in the Waiting Room. In such cases, the setting can be changed to the version in which participants are admitted directly without the Waiting Room feature. Consult with the Joint Research Support Section in advance.

- **Submitting a list of participants after an online joint research meeting**

The organizer must submit a list of participants to the RIMS staff after the end of an online joint research meeting. (It is also necessary to identify and specify participants who are categorized as those from foreign institutes, young researchers, and female participants.) (The lists are to be reported to the Ministry of Education, Culture, Sports, Science and Technology.)

The organizer must specify into lists the participants who fall in the categories of 'Participants from foreign institutes,' 'Participants aged 35 or younger,' 'Participants aged 36 to 39,' and 'Female participants'. These lists are asked to be submitted to the RIMS staff after the joint research meeting.

This process is not to require thorough surveys on the participants and the judgements can be made based solely on the organizer's impressions.

**Exercise utmost care in administration and be ready to cope with unexpected incidents properly.**

**The organizer are asked to give special consideration so that all relevant participants will observe the following points** to prepare themselves for any possible contingencies in the meeting beforehand.

- **Do not share URLs, IDs, and passwords for meeting rooms** for online joint research **with outsiders. It is also strictly prohibited to post** such URLs, IDs, and passwords at locations that are accessible to many and unspecified third parties **(e.g., websites, social media)**.
- If there is information leakage about the URL, etc. and outsiders log in during an online joint research meeting, the organizer **must take appropriate action (e.g., remove such outsiders)**. Organizers **are expected to be familiarized with the Zoom features beforehand** to take actions promptly.
- It is prohibited to record and store the videos and images of presentations, except for recording of presentations within the scope of personal use, etc. It is strictly prohibited to distribute such videos and images at locations that are accessible to many and unspecified third parties.
- Speakers must exercise utmost care in handling of reference materials used as presentation documents. They must implement appropriate measures (e.g., clearly indicating the source).
- If a Zoom meeting is forcibly ended due to a problem, RIMS staff will open the meeting room again. Contact the RIMS staff immediately.
- RIMS is not held responsible for any problems that may arise during online joint research meetings, except in cases where such problems are caused by failure of the Zoom account (paid version).

When using the guidelines for purposes other than joint usage projects of RIMS, contact the Joint Research Support Section (kyodo(at)kurims.kyoto-u.ac.jp).

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