

REGIONAL COMMITTEES' SUPPORT TOOLS RUNNING EVENTS ON MICROSOFT TEAMS

Institution of
**MECHANICAL
ENGINEERS**

SET-UP AND REGISTRATION

Versions of Teams

In order to run an event using Teams, the event organiser needs to have an IMechE Office 365 account. This means that when they set up the event and send out a link, it will be hosted on the IMechE Teams platform.

The version of Teams provided for volunteers is online and fully hosted on an internet browser (Edge or Chrome are recommended) which means that it is not necessary for users to download anything to their own computer (referred to as desk based). If you have downloaded Teams to your computer, then you are welcome to use this version as long as you use your IMechE login credentials to set up and run the event.

Within the Teams application there is a function called Teams Live. This training guide will not cover this function and will instead focus on using the standard version of Teams to run an event.

What types of course are suitable for this format?

Attendee limit: The version of Teams available to volunteers can host up to 250 attendees (including speakers, organisers and moderators). The expected attendance of the event will therefore determine if Teams is a suitable platform.

Presentation functions: In addition to camera and audio, event speakers are able to share content such as slide presentations or documents (Word, Excel, images, PDF). It is also possible to share one's computer desktop. With some preplanning it is also possible to make more than one person a speaker for an event. It is also possible to play videos with audio during a Teams event but testing beforehand is recommended.


Event duration: There is no limit to the duration of a Teams events although best practice for running an event dictates that a session not run for hours on end without pause. If you are contemplating a half or full day event, it is recommended that you segment the day, setting up smaller sessions with breaks in between to make it manageable for attendees.

Attendee functions: Teams has a hand up function for attendees to signal that they have a question or comment. There is also a live chat room accessible to all attendees which is also useful for answering questions during a presentation or flagging them for later. It is recommended that someone is designated as a moderator to look after the online chat room during an event.

Alternatives to Teams: If the event is expected to be much larger, on a national or international scale in terms of attendees you may be eligible to receive support from staff to use one of the commercial platforms. This may also be suitable if you are planning an event of some complexity in terms of presentation formats and participant functions.

There are selection criteria in place for such events so please contact Lucy Esmond at lucy.esmond@imeche.org to find out more and apply for support. This is not necessary for events such as the existing technical programme or education challenge events already supported by staff.

Creating an event in Teams

Please use the 'New meeting' option to do this. Go to **Calendar**  on the left side of the app and select **New meeting** in the top right corner. A scheduling form will pop up.

The scheduling form is where you'll give your event a title, **invite fellow committee members or speakers**, and add event details.

You can also schedule a recurring event by checking the '**Repeat**' checkbox. Once you do that, you will be able to choose how often you want your event to occur.

IMPORTANT: Do not create a meeting in a channel, as anyone joining it as a guest cannot access the Chat function.

Please note that Channels cannot be changed or deleted once a meeting invite has been sent.

IMPORTANT: Do not use the scheduling form to invite attendees who have registered for the event, you will need to use your IMechE email account instead. Please refer to 'Sending a Teams event invite from Outlook' below.

To learn more, please click the following link:

<https://support.office.com/en-gb/article/schedule-a-meeting-in-teams-943507a9-8583-4c58-b5d2-8ec8265e04e5>




Watch the video:

<https://support.office.com/en-us/article/manage-meetings-ba44d0fd-da3c-4541-a3eb-a868f5e2b137>

Changing participant settings

Although default participant settings are determined by the IMechE's IT admin, an event organiser may want to change them for a specific event. Organisers can make these changes on the Meeting options web page.

There are three different ways to get to **Meeting options** for a scheduled event / meeting:

- In Teams, go to **Calendar** , select an event / meeting, and then **Meeting options**.
- In an event / meeting invitation, select **Meeting options**.
- During an event / meeting, select **Show participants**  in the meeting controls. Then, above the list of participants, choose **Manage permissions** .

These instructions will appear in a web browser, regardless of whether you are using the Desktop version or web version of Teams.

IMPORTANT: Only meeting organisers can make changes. If you receive the following message "Only meeting organisers can make changes
Your account, xxxxxxxxx, doesn't have permissions to make changes."

You will need to sign out of any non-IMechE accounts and use your **@member.imeche.org** email account to make changes.

It is recommended that the **Don't allow attendees to unmute** option is enabled.

Attendees won't be able to unmute themselves, however if someone raises their hand, a presenter can let them unmute.

Meeting options

The following options are recommended:

- **Who can bypass the lobby?** People in my organization and trusted organizations
- **Always let callers bypass the lobby:** No
- **Announce when callers join or leave:** Yes
- **Who can present?** Specific people (you will need to type in their email addresses but please note that you can only enter member.imeche.org accounts and not third party ones)
- **Allow attendees to unmute:** No

IMPORTANT: In the likely event that the presenter / speaker does not have an member.imeche.org account, you will need to make them a presenter; this will need to be done once the event has commenced.

To do this click **Show participants** in the meeting controls to see a list of all the people in the meeting.

Hover over the name of the person whose role you want to change and click **More options** **⋮** . From there, select **Make a presenter**.

To learn more, please click the following link:

<https://support.microsoft.com/en-us/office/change-participant-settings-for-a-teams-meeting-53261366-dbd5-45f9-aae9-a70e6354f88e>

Sending a Teams event invite from Outlook:

An attendees list can be downloaded from Near You –

<https://nearyou.imeche.org/Sitefinity/Content/NearYouEvents>.

The email addresses contained within this list can then be copied and pasted into the BCC field of the email you will be composing.

IMPORTANT: Please delete this attendee list as soon as you have finished with it; do not use it to contact the attendees about any other events, as this is in breach of GDPR.

Sign into your IMechE Office 365 email account by visiting:

<https://outlook.office365.com/>

TIP: If you are having difficulty accessing this account please email digitalhelpdesk@imeche.org

To compose your email:

- Click the **New message** button (top left of web page)
- Add the recipients / attendee's email addresses to the **BCC** field, a subject, and type your message and **include a link to the Teams event**
- If you want to send a file, select **Attach**
- Click **Send**

IMPORTANT: To prevent a recipient's / attendee's email address from being revealed and thus prevent a GDPR breach, always add their email addresses to the BCC field.

Remember to send a reminder email a few days before the event commences (and possibly one on the day).

Sending out an invitation

The event should be created on Near You and the booking system enabled. Please visit page 89 of the User Guide:

<http://nearyou.imeche.org/docs/default-source/user-guide/sitefinity-user-guide.pdf?sfvrsn=4>

Or contact digitalhelpdesk@imeche.org for any IT support.

An invitation should be sent to the local members by the committees using the Lyris mass mailing system and possibly a wider audience with the help of HQ staff, depending on availability of the marketing team.

The Invitation should contain:

- Date and time of event
- Link to Teams event / meeting
- AgendaChekc
- Instructions on how to join, what to expect etc (they will be held in the lobby before being admitted)
- What technology they need, headset (make sure it works), good broadband connection
- Join the event at least 15 minutes before the event commences
- Use this time to test their audio and visual settings

Live captions and how to handle them

As diversity and inclusion are at the heart of the IMechE's core values, it's important that we try to cater for as many people as possible. For those that are hard of hearing, Teams has the option to add closed captions* for attendees of a meeting.

To enable the captions wait until the session has started, click the **⋮** icon at the top of the screen, and scroll down until you see **'Turn Live Captions On'**. This will turn on the subtitles for them.

It is important that this is mentioned in all marketing materials prior to the event, so that people aren't put off registering for the event. Once the meeting begins, please type the instructions for closed captions in the chat function for all to see.

IMPORTANT: These are currently only available on the desktop app version, not the website version. It's free to download the app.

TESTING AND REHEARSALS

Why testing is important

Ideally you want your event to run smoothly on the day, with as few glitches as possible. Running a test session beforehand is a good way to work through any potential issues such as computer and/or software compatibility, Wi-Fi strength, sound issues etc. It is also an opportunity to do a run-through of the event, ensuring that everyone involved knows what to do and when.

Who should participate in testing?

All the key event participants should take part, those who have a role in organising or delivering the event:

- **Event organiser** is responsible for setting up the event, invitations, registration, point of contact for speakers, etc.
- **Speaker(s)** are anyone who will be presenting during the virtual event. They may have accompanying slide material.
- **Moderator** is responsible for the live chat room. The two key skills needed are a reasonable technical understanding of Teams for trouble shooting, and some knowledge of the content to address or flag questions.

When should a test-run happen?

At least a week before the event is recommended. This will allow sufficient time to address any issues and/or request support from HQ. The role of the helpdesk is to help with technical issues you may encounter with using Teams (browser incompatibly, sound issues etc.).

The IT helpdesk team is available during office hours Monday to Friday and can be reached via email digitalhelpdesk@imeche.org. While they cannot be on hand during the event, the team can help with solving issues flagged during testing.

Testing/rehearsal checklist:

- Make sure all presenters have a strong internet connection
- Check the mute/unmute function
- Check they're able to turn their camera on and off
- Sound checks (each speaker one by one should count to 10 and organiser monitor sound levels. If one speaker is quieter than others, that needs addressing by checking if they're using a headset or mic – laptop mics generally make the sound worse. See if they can reposition the mic, or get closer to it. This should work, but if not get them to check their sound settings and make sure the input and the output for audio is regulated correctly)
- Test that any video you wish to play can be seen and heard by other participants without any image/sound lags
- Show how to share the screen and make sure it works
- Check their slides are working, they can navigate through them properly, videos and transitions work properly
- Explain how Q&A will be moderated – attendees can use 'raise hand' function and host will unmute them when they can speak. Attendees can also use the chat function to ask questions, so it's important that the host keeps monitoring this
- Run through timings of the event day – who will chair, what the format will be, how long each segment will be, etc.
- How to record – ensure speaker(s) is/are happy for it to be recorded and shared

BEFORE THE EVENT

On-the-day set-up (settings)

Use the Teams desktop application for full functionality or Microsoft Edge or Google Chrome if you are accessing the event via a web browser.

Download the desktop app by visiting <https://www.microsoft.com/en-gb/microsoft-365/microsoft-teams/download-app>

- Check the Near You booking system for last minute registrations
- Send them an email containing a link to the event
- Check the inbox of your email account for any messages pertaining to the event
- Send a reminder email to those people who have already registered
- Make sure your broadband is working correctly and that there is no work planned in your area that may affect connectivity
- Make sure that you have a place to run the event without experiencing interruptions, for example, physical, noise etc
- Turn your mobile and computer notifications to silent
- Access / join your event 30 minutes before the event commences; access your event via your **Calendar** on Teams and click the **Join** button

- Choose your **Audio and Video settings**
- Click the **Join now** button
- Make sure that your webcam is turned off and that your microphone is muted; these can be switched on when required.
- Click **Show participants** – you can select the option '**Don't allow attendees to unmute**' and manage other permissions
- From the participants pane, you can admit attendees who are waiting in the lobby and if necessary, request them to join by placing your cursor over their name and clicking the button.
- Click on **Show conversation** and test that the chat function is working by posting a welcome message to the attendees.
- Switch off the attendees' web cams to avoid any connectivity issues during the event.
- Make sure you have any relevant presentations available and ready to share
- Make sure all unnecessary windows and applications are closed down
- If presenting, make sure you have sufficient lighting in your room
- Make sure that the event starts on time
- When starting / stopping the recording of the event, announce this to the attendees
- A copy of the recording will be available in the Teams channel where the event / meeting is held or in the Teams Chat history, if a Teams channel was not used.

IMPORTANT: Make sure you have a designated person responsible for recording the event

Getting the event recording uploaded to YouTube

You can share a recording of your event via the IMechE public YouTube channel. First the event organiser will need to download the recording from the chat history for the event (this will be available on your chat list within Teams). Then it will need to be uploaded to SharePoint. Copy the link when this is done.

The event organiser will need to email Event Enquiries (eventenquiries@imeche.org) with the following information:

- The link to the video recording
- The title of the webinar
- The description of the webinar
- Speaker information
- Event delegate figures

The recording will then be uploaded to the IMechE's YouTube channel and you will be sent a link to the recording, which you can share with the event delegates. Please note that getting the recording uploaded can take up to two weeks.

TIP: For best practice, it is recommended that that you create a private channel for producers and presenters of your event so they can chat and share information before and during the event. Do not use the chat function for the actual event for private messages, as anything posted will be revealed to all attendees.

Contact digitalhelpdesk@imeche.org if you need help during normal working hours.

Speaker and content line-up

Everyone should be on a pre-call (separate to the event call) just to run through everything again from the test call. Run through timings of the event day – who will chair, what the format will be, how long each segment will be, etc. Get all chairs and speakers to turn off phones and close any programmes that may make a noise during the presentation.

Welcoming attendees before the event starts

As with a physical event, it is recommended that the organiser and/or person moderating the chat is available online before the event is scheduled to start. In the virtual context this means that they will need to join the event online a little earlier, probably share an event title slide, and be on hand to welcome people as they join the event.

Particularly for the chat moderator, this is a busy time trying to help people login properly, sort out their audio settings etc. For events where more attendees are expected, it may be useful to have more than one person available to provide such support in the lead up to and at the start of the event.

It is also recommended that you periodically, every five minutes or so, make general announcements regarding how the session will be run (chat room, Q&A etiquette, muting protocols etc.)

Chat muting, video and Q&A protocol

When the event begins attendees should be advised of the following:

- The event organiser should explain that all attendees will be muted throughout the event and will not be able to unmute themselves
- Attendees should be advised that their webcams will be disabled throughout the event, to prevent any connectivity issues and that these can be re-enabled when the event finishes, for the Q&A section
- Any questions will need to be posted via the **Chat** function and will be monitored by the moderator. The moderator will need to demonstrate how the **Chat** function works
- To use the **Chat** feature during a meeting in Teams, simply click the **Show conversation** button: The chat box will appear on the right: Type your message in the chat box and click the **Send** icon or the **Enter** key on your keyboard to send your message
- All questions that can be answered by moderator will be done via the **Chat** function and not verbally
- Any questions that cannot be answered will be left to the relevant presenter / speaker after the presentation concludes, during the Q&A section

When the presentation has finished, there should be a Q&A session. The protocol here is that:

- Attendees must select **Raise your hand.** in the meeting controls.
- The moderator must select **Show participants.** to see a list of everyone in attendance. Anyone who's raised their hand will have an icon next to their name. When multiple people raise their hands, they'll be listed in the order in which they raised them.
- The moderator makes the attendee who has raised their hand a presenter (this is so the attendee can unmute themselves; the moderator / event organiser cannot unmute the attendee)
- The moderator asks the attendee to ask their question
- The presenter / speaker answers the question
- The moderator then changes the role of the person asking the question back to an attendee (to avoid the risk of them interrupting proceedings unnecessarily)

DURING THE EVENT

General housekeeping checklist

- Chair to introduce the event
- Chair to introduce themselves
- If relevant, Chair to share some information about the host region within the IMechE to encourage recruitment
- Chair to explain how the event will run, including Q&A sessions. Encourage attendees to use the chat function during the presentations to ask questions. Chair or moderator to monitor these throughout and pick out the most relevant to ask
- Chair to introduce the speaker(s) using their biography if they have one. If they don't, ask them for a few words during the pre-call that they'd like you to use to introduce them to the audience
- Once the speaker has finished, thank them and open the floor to questions. If you've had some submitted via chat, address those first

Content sharing – How and best practice

In Microsoft Teams, you can show your desktop, a specific app, presentation, or any file while in a meeting:

- Select **Share**
- Select what you want to share: ...
- After you select what you want to show, a red border surrounds the window / application you are sharing
- Select **Stop sharing** to stop showing your screen

Best practice: Before the presentation takes place, make sure that any unnecessary applications are closed down. This is to avoid any security or GDPR breaches and to make it easier to locate the application you need to share.

Chat moderation, lobby and tech support

- Assign a moderator to look after the **Chat** function.
- In the meeting controls, select **Show participants**. to see a list of everyone in attendance
- By default, all attendees who do not have IMechE Office 365 accounts will arrive in a virtual lobby after which they will have to be admitted to join the actual event / presentation.

Troubleshooting

Below are some tips and advice for attendees having trouble on the day:

- Teams works better using the desktop app rather than the website version, so if anyone has any issues, download the app. It's free and quick
- If having issues connecting to Teams on work device, try using a personal device instead (there is a Microsoft Teams mobile phone app)
- If there are sound issues, check audio settings and make sure right output is selected
- Double check the hardware to ensure the speakers and mic are connected and/or switched on
- If having connection issues, turning cameras off helps with bandwidth.
- Also turn off any other devices that are using Wi-Fi. Prior to the event, make sure nobody else in the house is using a lot of bandwidth to help with your connection
- Close down all other apps on the device you're using to save bandwidth
- Make sure that you can access your MS O365 / Teams account
- Restart the device you are using as this often reboots relevant settings

Please contact digitalhelpdesk@imeche.org (only manned between 09:15 and 17:30 Monday-Friday) if all else fails.

AFTER THE EVENT

Taking questions

When the presentation has finished, there will be a Q&A session lasting 30 minutes? Exact time to be determined. The protocol is that the attendees must:

- Select **Raise your hand**. in the meeting controls.
- The moderator must:
- Select **Show participants**. to see a list of everyone in attendance. Anyone who's raised their hand will have an icon next to their name. When multiple people raise their hands, they'll be listed in the order in which they raised them.
- The moderator makes the attendee who has raised their hand a presenter (this is so the attendee can unmute themselves; the moderator / event organiser cannot do this)
- The moderator asks the attendee to ask their question
- The presenter / speaker answers the question
- The moderator then changes the role of the person asking the question back to an attendee (to avoid the risk of them interrupting proceedings unnecessarily)

Shutting the event down

End the event for everyone in attendance. Event organisers have the option to end the event for all participants. This is a great way to make sure that attendees don't hang around once you have left the presentation.

To end an in-progress event, go to your meeting controls and select the **More options button > End meeting**. You'll be asked to confirm. When you do, the event will end for everyone right away.

Sending out feedback forms (optional extra)

The moderator will advise the attendees that they will be sent an email which will contain a link to a feedback form (this must be created using Microsoft Forms - <https://www.microsoft.com/en-gb/microsoft-365/online-surveys-polls-quizzes>). The moderator to mention that the responses to this survey are anonymous (this instruction to be included in the email (template to be provided by HQ)

There will also be a link to a recording of the event / presentation.

View and download meeting attendance reports

If you wish to view the number of delegates who attended your event, can you do this by downloading the meeting attendance report.

Instructions explaining how to do this can be found by visiting:

<https://support.microsoft.com/en-us/office/view-and-download-meeting-attendance-reports-in-teams-ae7cf170-530c-47d3-84c1-3aedac74d310>

Please note that this report may contain delegate email addresses. Do not use these as an unofficial mailing list to contact these delegates about future events.

Getting the event recording uploaded to YouTube

You can share a recording of your event via the IMechE public YouTube channel. First the event organiser will need to download the recording from the chat history for the event (this will be available on your chat list within Teams). Then it will need to be uploaded to SharePoint. Copy the link when this is done.

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The recording will then be uploaded to the IMechE's YouTube channel and you will be sent a link to the recording, which you can share with the event delegates. Please note that getting the recording uploaded can take up to two weeks.

Sending out additional materials

Most attendees for virtual events appreciate receiving a copy of any material presented during an event. It is recommended that the event organiser have these documents collated and ready to send out as soon as possible after the event, along with any other additional material which may have been promised. This can be done via email (in the BCC field) using the attendee list.