

MANUAL TO ORGANISE AND JOIN ONLINE EVENTS WITH SKYPE FOR BUSINESS

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About this manual

This manual has been designed for Helvetas staff at the head office, as a resource to assist them in organising and joining any type of online events, within the organisation's technical infrastructure using Microsoft Skype for Business.

Most of the content is applicable for generic conceptual coordination of online events and can therefore be used by partners and any other individual or organisation interested in organising online events using Skype for Business or another service.

The quick version of this manual and a specific manual on organisation of webinars, focused on facilitation aspects, are available at: <https://www.helvetas.org/en/switzerland/what-we-do/transversal-topics/knowledge-learning>

About online events at Helvetas

Online events at Helvetas are prepared with the aim of sharing knowledge, generating dialogues and connecting people for collaborative learning amongst key stakeholders, often as a complementary process for external and internal mandates, face-to-face events, or other online exchanges, in a wide range of scenarios, e.g. team meetings, all staff meetings, committee meetings, etc. Beyond achieving the sharing and learning objectives, online events enhance collaboration, because they help bringing people together from different geographic locations, into one "moment" of sharing and learning. At the end, collaboration is not about technology, it's about people, and online events will help us build opportunities to connect, share and learn together as a complementary tool to face-to-face opportunities.

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Joining an online event

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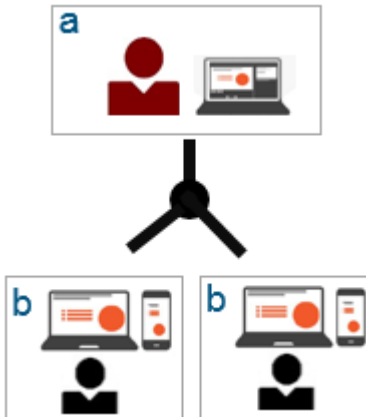
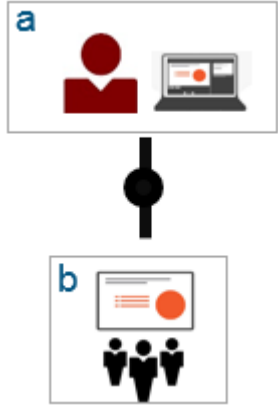
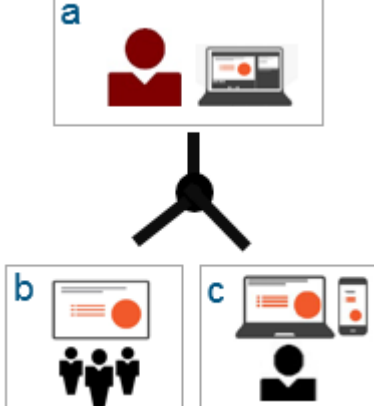
ORGANISING AN ONLINE EVENT



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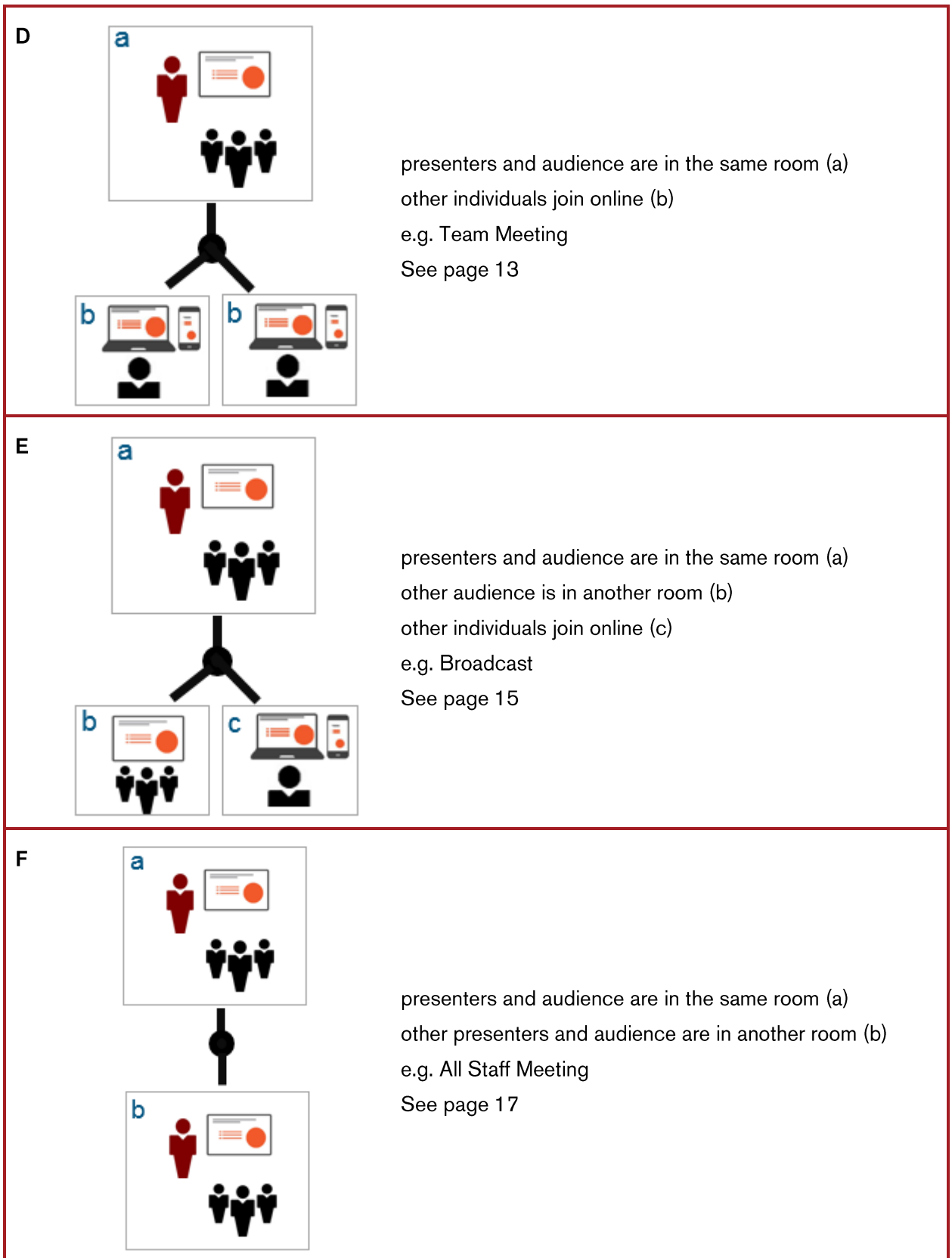
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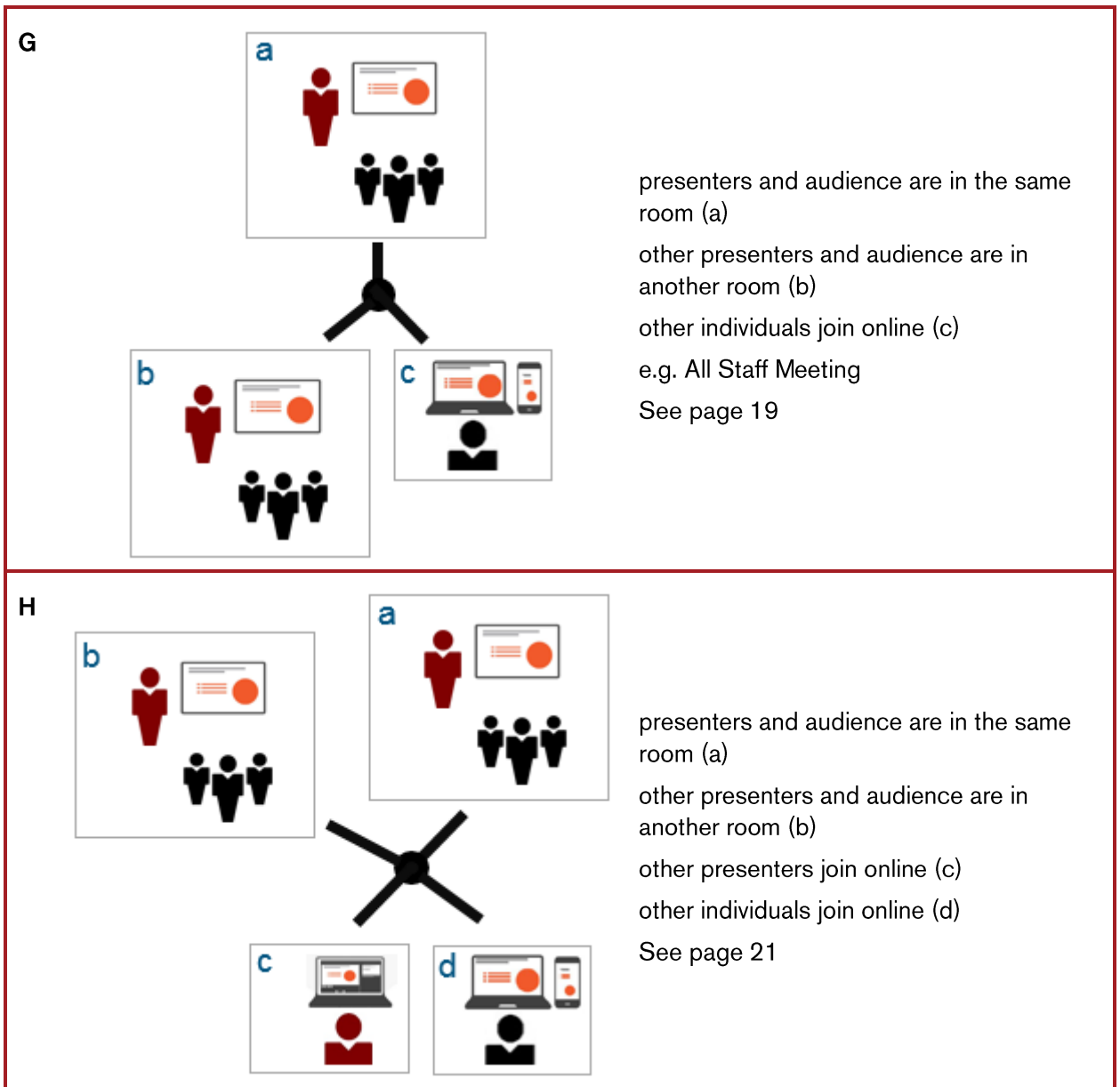
1. Identify the scenario

Identify the type of event that you are organizing and follow the corresponding instructions.

<p>A</p> 	<p>presenter makes presentation from individual computer (a) other individuals join online (b) See page 8</p>
<p>B</p> 	<p>presenter makes presentation from individual computer (a) audience sit together in another room (b) See page 10</p>
<p>C</p> 	<p>presenter makes presentation from individual computer (a) audience sit together in another room (b) other individuals join online (c) See page 11</p>

 = presenter (speaker, interactive participant) /  = audience (listener, silent participant)





presenters and audience are in the same room (a)

other presenters and audience are in another room (b)

other individuals join online (c)

e.g. All Staff Meeting

See page 19



presenters and audience are in the same room (a)

other presenters and audience are in another room (b)

other presenters join online (c)

other individuals join online (d)

See page 21

 = presenter (speaker, interactive participant) /  = audience (listener, silent participant)

2. Quick Manual to organise an online event

This manual shows the basic steps to organise events, for fast preparation. Please note these instructions aren't detailed but they are sufficient to prepare for an online event.

Decide on a scenario

- Is it going to be an online event only or will there also people attend physically in a place where presentation will be displayed?
- Will there be one or more presenters and will they be in the same location?
- What is the expected number of audience and will they be in one of multiple locations?

Check the previous pages to find the scenario that best fits your event.

Create event and book rooms and equipment

- Create and configure a "Skype Meeting" in Outlook
- Make all needed reservations for rooms and equipment in Outlook
- Ask apprentices if you need special seating arrangements or help during the event
- Invite facilitators as needed (if the audience is expected to ask questions, you might need someone to manage the chat function or switch microphones on and off)

Inform participants about their way of connecting

Include the following information when inviting the participants:

- Inform the presenters and audience about their way of connecting to the event by pointing to the respective "joining scenario" in this manual.
- Ask all presenters to upload a profile picture to their "Skype for Business" account

Cross check event configuration and upload files

Check that all needed rooms, equipment and facilitators accepted the meeting request and that the seating arrangements are taken care of.

Make sure that all files of all presenters (Power Point, PDF, Word, Excel etc.) are uploaded to the online event.

Check and test audio and video settings

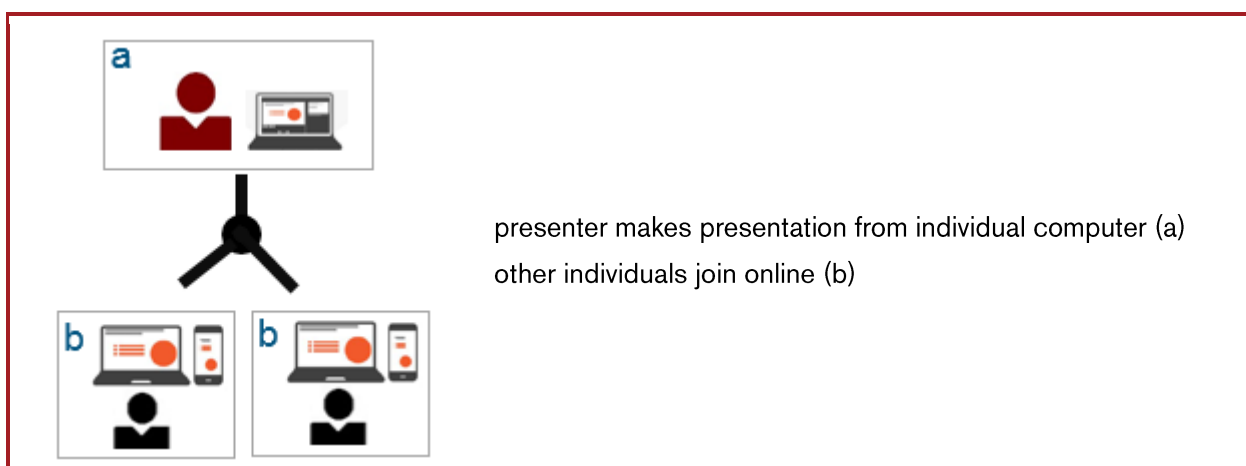
- Make sure all presenters can be heard (and seen).
- Test equipment and settings with collected audience in meeting rooms.

People connecting as online audience are responsible for their own equipment.

3. Detailed Manual to organise an online event

This manual shows you step by step how to organise your meeting, from deciding the type of scenario, to how-to facilitate and wrap up.

3.1. Scenario A



As soon as possible

- Create online event and set participant's permissions. Follow manual 4.1 "Create and configure online event" on page 24.
- Book the rooms if necessary. The presenter will need to be in quiet room to facilitate the online event. Follow manual 4.2 "Booking rooms" on page 27.
- Book further equipment if necessary. If the presenter does not have his/her own laptop or camera, make sure to reserve those in outlook along with external cameras, speakers, microphones etc. Follow manual 4.3 "Booking equipment" on page 27.
- Make a test with the presenter, to corroborate his equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If audio or video doesn't work, follow manual 5.1 "Audio and video settings in S4B" on page 50.
- If head of meeting will invite people to ask questions (in the chat), then confirm who the person in charge of moderating this chat will be (needs to be thematic oriented).
- Inform participants (presenters and audience). To prepare this customised email, follow manual 4.5 "Create invitation email" on page 30. If you did not yet send the invitation to all of them when creating the event, you can send the link in a separate email. See step 4 of the manual 4.1. "Create and configure online event" on page 24.
- (Optional, good for online events or events targeting all staff) Prepare mail called "Happening Now", which can be sent right at the start of the event. Sending this email increases participation, as people are reminded right on the spot. To prepare this email, see manual 4.5 "Create email "Happening now"" on page 31.

Day of the event (1 hour to 30 minutes before event)

- Make a test with the presenter to confirm his/her equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If light isn't good, consider using a soft box.
- Open the meeting and make sure that
 - Presenters join enough time before event starts to make all works
 - Presentations are uploaded (if not done already). Follow manual 5.2 "Uploading content to online event" on page 51
 - Participants' settings are correct (muted/unmuted, as presenters/attendees, video on/off). Follow manual 4.1 "Create and configure online event" on page 24
- brief the presenters about technical aspects (where is the mic, camera, light)
- set the audience and presenters right (mute-unmute, camera, etc.)
- open presentation (e.g. Power Point file)

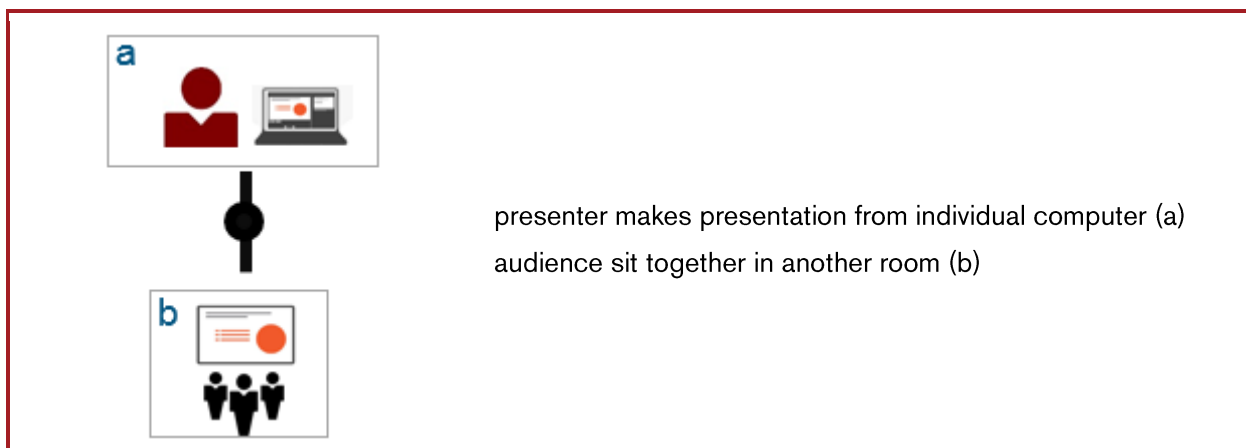
During the event

- If you prepared a "Happening Now" email, send it a minute before the event starts (to prepare this email, follow manual 4.5 "Create email "Happening now"" on page 31).
- start recording meeting (if needed). See manual 4.4 "Record an event" on page 28
- Since the software does not provide statistics, ask presenter to ask participants "where are they from", or "from where are they watching". This helps the facilitation and kicks off interaction.
- Ask Chat moderator to welcome people in the chat. Instruct him/her to reply to questions of participants referring to them with their name, so that the chat thread is understandable.

After the event

- Stop recording (if you started), and retrieve the video and save it. If needed, it can be uploaded to YouTube in a private channel for sharing on the intranet. Follow manual 4.4 "Record an event" on page 28
- Recommended: create a report page on your intranet and place a small intro (what was the event about), a link to the video, the presentation or files presented, etc.
- Send a "thank you" email to participants and point them to the report page.

3.2. Scenario B



As soon as possible

- Create online event and set participant's permissions. Follow manual 4.1 "Create and configure online event" on page 24.
- Book the rooms if necessary. The presenter will need to be in quiet room to facilitate the online event. Follow manual 4.2 "Booking rooms" on page 27.
- Book further equipment if necessary. If the presenter does not have his/her own laptop or camera, make sure to reserve those in outlook along with external cameras, speakers, microphones etc. Follow manual 4.3 "Booking equipment" on page 27.
- Make a test with the presenter, to corroborate his equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If audio or video doesn't work, follow manual 5.1 "Audio and video settings in S4B" on page 50.
- If head of meeting will invite people to ask questions (in the chat), then confirm who the person in charge of moderating this chat will be (needs to be thematic oriented).
- Inform participants (presenters and audience). To prepare this customised email, follow manual 4.5 "Create invitation email" on page 30. If you did not yet send the invitation to all of them when creating the event, you can send the link in a separate email. See step 4 of the manual 4.1. "Create and configure online event" on page 24.

Day of the event (1 hour to 30 minutes before event)

- Make a test with the presenter to confirm his/her equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If light isn't good, consider using a soft box.
- Inform the chat moderator that she/he will be in charge of writing the questions in the chat (for the presenter) in case the audio doesn't work properly.
- Open the meeting and make sure that
 - Presenters join enough time before event starts to make all works
 - Presentations are uploaded (if not done already). Follow manual 5.2 "Uploading content to online event" on page 51
 - Participants' settings are correct (muted/unmuted, as presenters/attendees, video on/off). Follow manual 4.1 "Create and configure online event" on page 24
- brief the presenters about technical aspects (where is the mic, camera, light)
- set the audience and presenters right (mute-unmute, camera, etc.)
- open presentation (e.g. Power Point file)

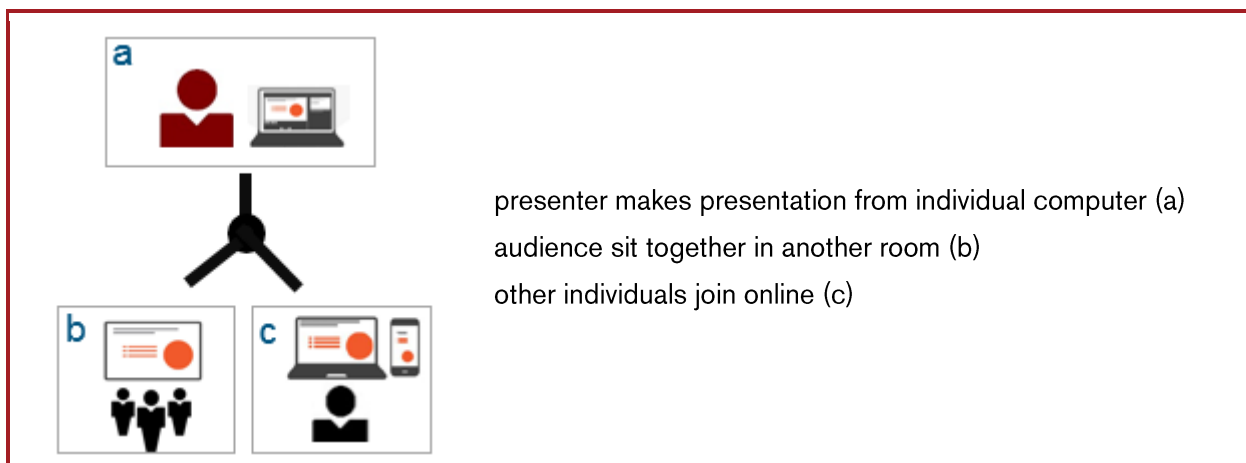
During the event

- If you prepared a "Happening Now" email, send it a minute before the event starts (to prepare this email, follow manual 4.5 "Create email "Happening now"" on page 31).
- start recording meeting (if needed). See manual 4.4 "Record an event" on page 28
- Since the software does not provide statistics, ask presenter to ask participants "where are they from", or "from where are they watching". This helps the facilitation and kicks off interaction.
- Ask Chat moderator to welcome people in the chat. Instruct him/her to reply to questions of participants referring to them with their name, so that the chat thread is understandable.

After the event

- Stop recording (if you started), and retrieve the video and save it. If needed, it can be uploaded to YouTube in a private channel for sharing on the intranet. Follow manual 4.4 "Record an event" on page 28
- Recommended: create a report page on your intranet and place a small intro (what was the event about), a link to the video, the presentation or files presented, etc.
- Send a "thank you" email to participants and point them to the report page.

3.3. Scenario C



As soon as possible

- Create online event and set participant's permissions. Follow manual 4.1 "Create and configure online event" on page 24.
- Book the rooms if necessary. The presenter will need to be in quiet room to facilitate the online event. Follow manual 4.2 "Booking rooms" on page 27.
- Book further equipment if necessary. If the presenter does not have his/her own laptop or camera, make sure to reserve those in outlook along with external cameras, speakers, microphones etc. Follow manual 4.3 "Booking equipment" on page 27.
- Make a test with the presenter, to corroborate his equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If audio or video doesn't work, follow manual 5.1 "Audio and video settings in S4B" on page 50.
- If head of meeting will invite people to ask questions (in the chat), then confirm who the person in charge of moderating this chat will be (needs to be thematic oriented).
- Inform participants (presenters and audience). To prepare this customised email, follow manual 4.5 "Create invitation email" on page 30. If you did not yet send the invitation to all of them when creating the event, you can send the link in a separate email. See step 4 of the manual 4.1. "Create and configure online event" on page 24.
- (Optional, good for online events or events targeting all staff) Prepare mail called "Happening Now", which can be sent right at the start of the event. Sending this email increases participation, as people are reminded right on the spot. To prepare this email, see manual 4.5 "Create email "Happening now"" on page 31.

Day of the event (1 hour to 30 minutes before event)

- Make a test with the presenter to confirm his/her equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If light isn't good, consider using a soft box.
- Open the meeting and make sure that
 - Presenters join enough time before event starts to make all works
 - Presentations are uploaded (if not done already). Follow manual 5.2 "Uploading content to online event" on page 51
 - Participants' settings are correct (muted/unmuted, as presenters/attendees, video on/off). Follow manual 4.1 "Create and configure online event" on page 24
- brief the presenters about technical aspects (where is the mic, camera, light)
- set the audience and presenters right (mute-unmute, camera, etc.)
- open presentation (e.g. Power Point file)

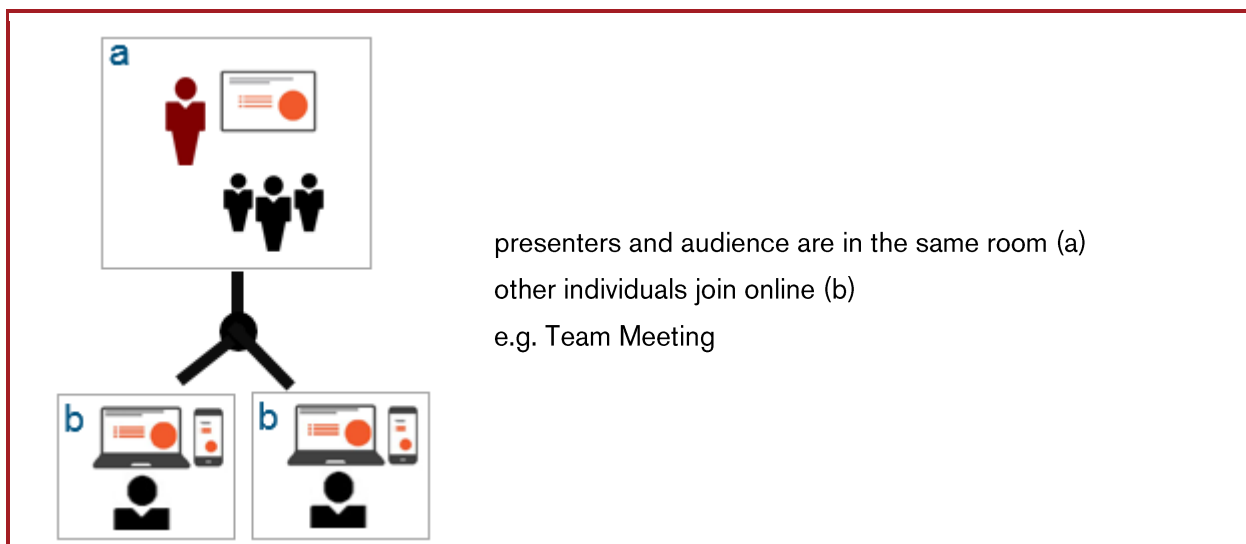
During the event

- If you prepared a "Happening Now" email, send it a minute before the event starts (to prepare this email, follow manual 4.5 "Create email "Happening now"" on page 31).
- start recording meeting (if needed). See manual 4.4 "Record an event" on page 28
- Since the software does not provide statistics, ask presenter to ask participants "where are they from", or "from where are they watching". This helps the facilitation and kicks off interaction.
- Ask Chat moderator to welcome people in the chat. Instruct him/her to reply to questions of participants referring to them with their name, so that the chat thread is understandable.
- The presenter might be interested to see the audience in the room (who is participating in the room). Try to set up a camera that shows the participants.

After the event

- Stop recording (if you started), and retrieve the video and save it. If needed, it can be uploaded to YouTube in a private channel for sharing on the intranet. Follow manual 4.4 "Record an event" on page 28
- Recommended: create a report page on your intranet and place a small intro (what was the event about), a link to the video, the presentation or files presented, etc.
- Send a "thank you" email to participants and point them to the report page.

3.4. Scenario D



As soon as possible

- Create online event and set participant's permissions. Follow manual 4.1 "Create and configure online event" on page 24.
- Book the rooms if necessary. The presenter will need to be in quiet room to facilitate the online event. Follow manual 4.2 "Booking rooms" on page 27.
- Book further equipment if necessary. If the presenter does not have his/her own laptop or camera, make sure to reserve those in outlook along with external cameras, speakers, microphones etc. Follow manual 4.3 "Booking equipment" on page 27.
- Make a test with the presenter, to corroborate his equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If audio or video doesn't work, follow manual 5.1 "Audio and video settings in S4B" on page 50.
- If head of meeting will invite people to ask questions (in the chat), then confirm who the person in charge of moderating this chat will be (needs to be thematic oriented).
- Inform participants (presenters and audience). To prepare this customised email, follow manual 4.5 "Create invitation email" on page 30. If you did not yet send the invitation to all of them when creating the event, you can send the link in a separate email. See step 4 of the manual 4.1. "Create and configure online event" on page 24.
- (Optional, good for online events or events targeting all staff) Prepare mail called "Happening Now", which can be sent right at the start of the event. Sending this email increases participation, as people are reminded right on the spot. To prepare this email, see manual 4.5 "Create email "Happening now"" on page 31.

Day of the event (1 hour to 30 minutes before event)

- Make a test with the presenter to confirm his/her equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If light isn't good, consider using a soft box.
- Open the meeting and make sure that
 - Presenters join enough time before event starts to make all works
 - Presentations are uploaded (if not done already). Follow manual 5.2 "Uploading content to online event" on page 51
 - Participants' settings are correct (muted/unmuted, as presenters/attendees, video on/off). Follow manual 4.1 "Create and configure online event" on page 24
- brief the presenters about technical aspects (where is the mic, camera, light)
- set the audience and presenters right (mute-unmute, camera, etc.)
- open presentation (e.g. Power Point file)

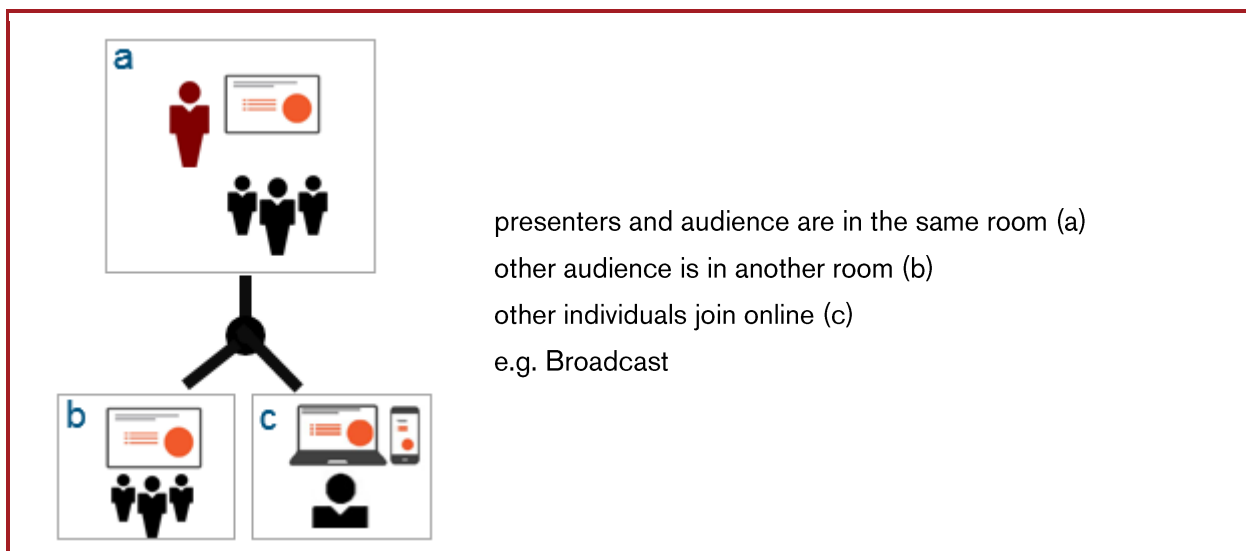
During the event

- If you prepared a "Happening Now" email, send it a minute before the event starts (to prepare this email, follow manual 4.5 "Create email "Happening now"" on page 31).
- start recording meeting (if needed). See manual 4.4 "Record an event" on page 28
- Since the software does not provide statistics, ask presenter to ask participants "where are they from", or "from where are they watching". This helps the facilitation and kicks off interaction.
- Ask Chat moderator to welcome people in the chat. Instruct him/her to reply to questions of participants referring to them with their name, so that the chat thread is understandable.

After the event

- Stop recording (if you started), and retrieve the video and save it. If needed, it can be uploaded to YouTube in a private channel for sharing on the intranet. Follow manual 4.4 "Record an event" on page 28
- Recommended: create a report page on your intranet and place a small intro (what was the event about), a link to the video, the presentation or files presented, etc.
- Send a "thank you" email to participants and point them to the report page.

3.5. Scenario E



As soon as possible

- Create online event and set participant's permissions. Follow manual 4.1 "Create and configure online event" on page 24.
- Book the rooms if necessary. The presenter will need to be in quiet room to facilitate the online event. Follow manual 4.2 "Booking rooms" on page 27.
- Book further equipment if necessary. If the presenter does not have his/her own laptop or camera, make sure to reserve those in outlook along with external cameras, speakers, microphones etc. Follow manual 4.3 "Booking equipment" on page 27.
- Make a test with the presenter, to corroborate his equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If audio or video doesn't work, follow manual 5.1 "Audio and video settings in S4B" on page 50.
- If head of meeting will invite people to ask questions (in the chat), then confirm who the person in charge of moderating this chat will be (needs to be thematic oriented).
- Inform participants (presenters and audience). To prepare this customised email, follow manual 4.5 "Create invitation email" on page 30. If you did not yet send the invitation to all of them when creating the event, you can send the link in a separate email. See step 4 of the manual 4.1. "Create and configure online event" on page 24.
- (Optional, good for online events or events targeting all staff) Prepare mail called "Happening Now", which can be sent right at the start of the event. Sending this email increases participation, as people are reminded right on the spot. To prepare this email, see manual 4.5 "Create email "Happening now"" on page 31.
- Confirm who will be the person supporting you with technical aspects in the other location.
- We recommend you to appoint an extra person in the other room to be in charge of collecting questions from the participants in that room, to write them in the chat in case the microphone isn't working. This person should be additional to the person who supports you at the technical level because this optimizes time during the event.

Day of the event (1 hour to 30 minutes before event)

- Make a test with the presenter to confirm his/her equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If light isn't good, consider using a soft box.
- Open the meeting and make sure that
 - Presenters join enough time before event starts to make all works
 - Presentations are uploaded (if not done already). Follow manual 5.2 "Uploading content to online event" on page 51
 - Participants' settings are correct (muted/unmuted, as presenters/attendees, video on/off). Follow manual 4.1 "Create and configure online event" on page 24
- brief the presenters about technical aspects (where is the mic, camera, light)
- set the audience and presenters right (mute-unmute, camera, etc.)
- open presentation (e.g. Power Point file)

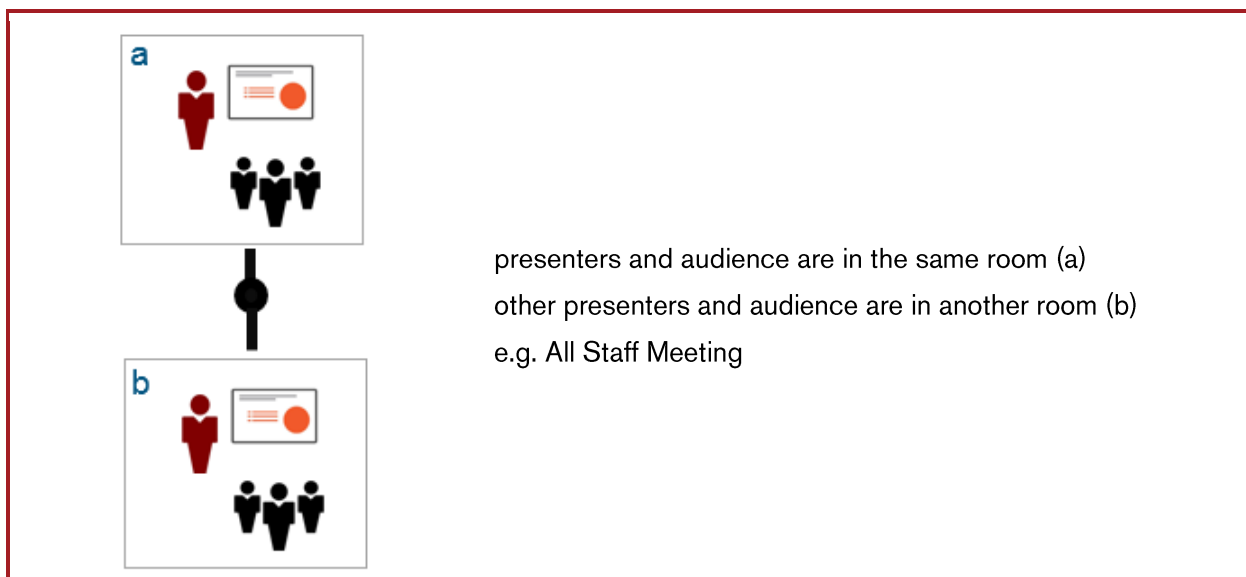
During the event

- If you prepared a "Happening Now" email, send it a minute before the event starts (to prepare this email, follow manual 4.5 "Create email "Happening now"" on page 31).
- start recording meeting (if needed). See manual 4.4 "Record an event" on page 28
- Since the software does not provide statistics, ask presenter to ask participants "where are they from", or "from where are they watching". This helps the facilitation and kicks off interaction.
- Ask Chat moderator to welcome people in the chat. Instruct him/her to reply to questions of participants referring to them with their name, so that the chat thread is understandable.

After the event

- Stop recording (if you started), and retrieve the video and save it. If needed, it can be uploaded to YouTube in a private channel for sharing on the intranet. Follow manual 4.4 "Record an event" on page 28
- Recommended: create a report page on your intranet and place a small intro (what was the event about), a link to the video, the presentation or files presented, etc.
- Send a "thank you" email to participants and point them to the report page.

3.6. Scenario F



As soon as possible

- Create online event and set participant's permissions. Follow manual 4.1 "Create and configure online event" on page 24.
- Book the rooms if necessary. The presenter will need to be in quiet room to facilitate the online event. Follow manual 4.2 "Booking rooms" on page 27.
- Book further equipment if necessary. If the presenter does not have his/her own laptop or camera, make sure to reserve those in outlook along with external cameras, speakers, microphones etc. Follow manual 4.3 "Booking equipment" on page 27.
- Make a test with the presenter, to corroborate his equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If audio or video doesn't work, follow manual 5.1 "Audio and video settings in S4B" on page 50.
- Confirm who will be the person supporting you with technical aspects in the other location.
- We recommend you to appoint an extra person in the other room to be in charge of collecting questions from the participants in that room, to write them in the chat in case the microphone isn't working. This person should be additional to the person who supports you at the technical level because this optimizes time during the event.
- Inform participants (presenters and audience) when and where the event will take place. Since everyone will join in the room, there is no need to send them the link to Skype for Business.

Day of the event (1 hour to 30 minutes before event)

- Make a test with the presenter to confirm his/her equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If light isn't good, consider using a soft box.
- Open the meeting and make sure that
 - Presenters join enough time before event starts to make all works
 - Presentations are uploaded (if not done already). Follow manual 5.2 "Uploading content to online event" on page 51
 - Participants' settings are correct (muted/unmuted, as presenters/attendees, video on/off). Follow manual 4.1 "Create and configure online event" on page 24
- brief the presenters in both locations about technical aspects (where is the mic, camera, light, she/him, where to stand that's good for the visibility of the people joining in the room and the people joining online).
- set the audience and presenters right (mute-unmute, camera, etc.)
- open presentation (e.g. Power Point file)

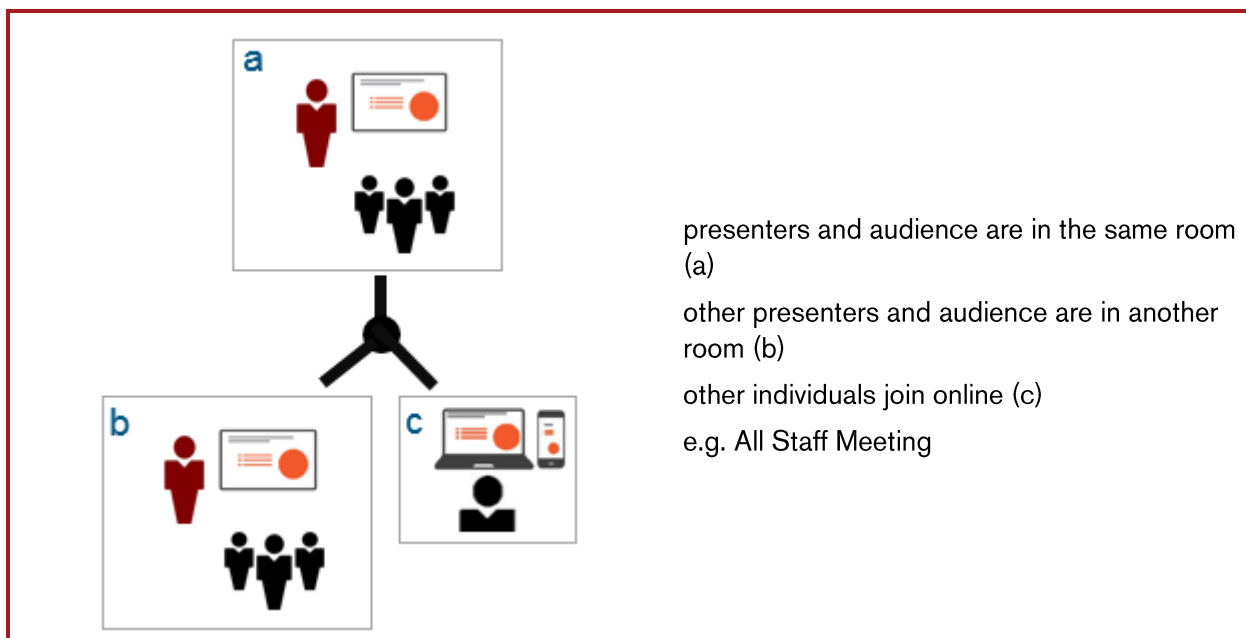
During the event

- start recording meeting (if needed). See manual 4.4 "Record an event" on page 28
- Since the software does not provide statistics, ask presenter to ask participants "where are they from", or "from where are they watching". This helps the facilitation and kicks off interaction.

After the event

- Stop recording (if you started), and retrieve the video and save it. If needed, it can be uploaded to YouTube in a private channel for sharing on the intranet. Follow manual 4.4 "Record an event" on page 28
- Recommended: create a report page on your intranet and place a small intro (what was the event about), a link to the video, the presentation or files presented, etc.
- Send a "thank you" email to participants and point them to the report page.

3.7. Scenario G



As soon as possible

- Create online event and set participant's permissions. Follow manual 4.1 "Create and configure online event" on page 24.
- Book the rooms if necessary. The presenter will need to be in quiet room to facilitate the online event. Follow manual 4.2 "Booking rooms" on page 27.
- Book further equipment if necessary. If the presenter does not have his/her own laptop or camera, make sure to reserve those in outlook along with external cameras, speakers, microphones etc. Follow manual 4.3 "Booking equipment" on page 27.
- Make a test with the presenter, to corroborate his equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If audio or video doesn't work, follow manual 5.1 "Audio and video settings in S4B" on page 50.
- If head of meeting will invite people to ask questions (in the chat), then confirm who the person in charge of moderating this chat will be (needs to be thematic oriented).
- Inform participants (presenters and audience). To prepare this customised email, follow manual 4.5 "Create invitation email" on page 30. If you did not yet send the invitation to all of them when creating the event, you can send the link in a separate email. See step 4 of the manual 4.1. "Create and configure online event" on page 24.
- (Optional, good for online events or events targeting all staff) Prepare mail called "Happening Now", which can be sent right at the start of the event. Sending this email increases participation, as people are reminded right on the spot. To prepare this email, see manual 4.5 "Create email "Happening now"" on page 31.
- Confirm who will be the person supporting you with technical aspects in the other location.
- We recommend you to appoint an extra person in the other room to be in charge of collecting questions from the participants in that room, to write them in the chat in case the microphone isn't

working. This person should be additional to the person who supports you at the technical level because this optimizes time during the event.

Day of the event (1 hour to 30 minutes before event)

- Make a test with the presenter to confirm his/her equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If light isn't good, consider using a soft box.
- Open the meeting and make sure that
 - Presenters join enough time before event starts to make all works
 - Presentations are uploaded (if not done already). Follow manual 5.2 "Uploading content to online event" on page 51
 - Participants' settings are correct (muted/unmuted, as presenters/attendees, video on/off). Follow manual 4.1 "Create and configure online event" on page 24
- brief the presenters in both locations about technical aspects (where is the mic, camera, light, she/him, where to stand that's good for the visibility of the people joining in the room and the people joining online).
- set the audience and presenters right (mute-unmute, camera, etc.)
- open presentation (e.g. Power Point file)

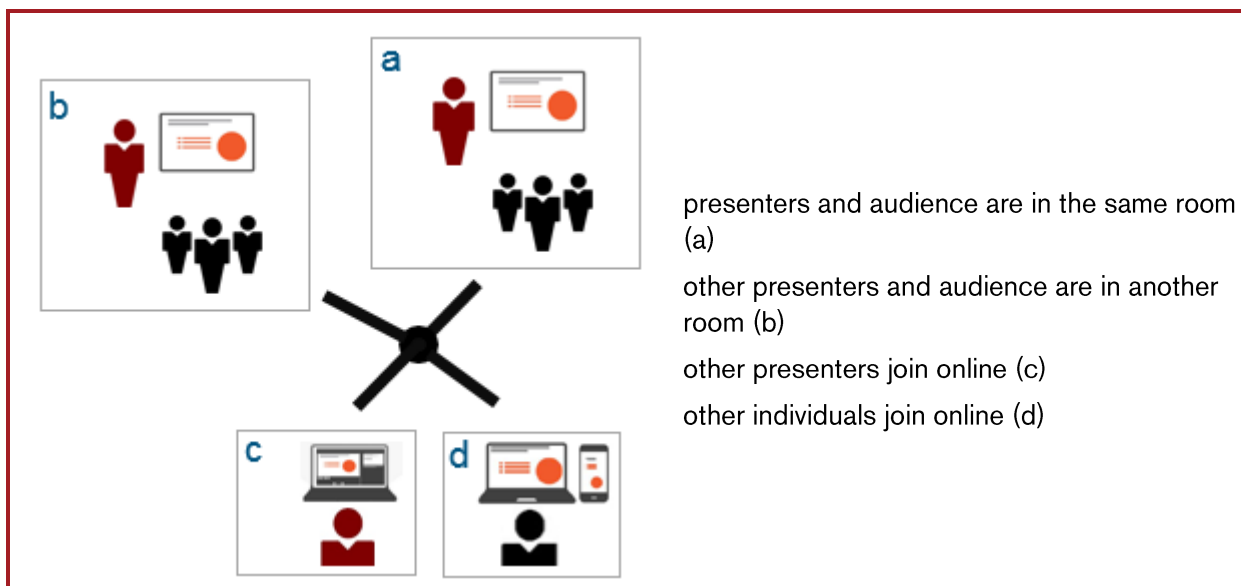
During the event

- If you prepared a "Happening Now" email, send it a minute before the event starts (to prepare this email, follow manual 4.5 "Create email "Happening now"" on page 31).
- start recording meeting (if needed). See manual 4.4 "Record an event" on page 28
- Since the software does not provide statistics, ask presenter to ask participants "where are they from", or "from where are they watching". This helps the facilitation and kicks off interaction.
- Ask Chat moderator to welcome people in the chat. Instruct him/her to reply to questions of participants referring to them with their name, so that the chat thread is understandable.

After the event

- Stop recording (if you started), and retrieve the video and save it. If needed, it can be uploaded to YouTube in a private channel for sharing on the intranet. Follow manual 4.4 "Record an event" on page 28
- Recommended: create a report page on your intranet and place a small intro (what was the event about), a link to the video, the presentation or files presented, etc.
- Send a "thank you" email to participants and point them to the report page.

3.8. Scenario H



As soon as possible

- Create online event and set participant's permissions. Follow manual 4.1 "Create and configure online event" on page 24.
- Book the rooms if necessary. The presenter will need to be in quiet room to facilitate the online event. Follow manual 4.2 "Booking rooms" on page 27.
- Book further equipment if necessary. If the presenter does not have his/her own laptop or camera, make sure to reserve those in outlook along with external cameras, speakers, microphones etc. Follow manual 4.3 "Booking equipment" on page 27.
- Make a test with the presenter, to corroborate his equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If audio or video doesn't work, follow manual 5.1 "Audio and video settings in S4B" on page 50.
- If head of meeting will invite people to ask questions (in the chat), then confirm who the person in charge of moderating this chat will be (needs to be thematic oriented).
- Inform participants (presenters and audience). To prepare this customised email, follow manual 4.5 "Create invitation email" on page 30. If you did not yet send the invitation to all of them when creating the event, you can send the link in a separate email. See step 4 of the manual 4.1. "Create and configure online event" on page 24.
- (Optional, good for online events or events targeting all staff) Prepare mail called "Happening Now", which can be sent right at the start of the event. Sending this email increases participation, as people are reminded right on the spot. To prepare this email, see manual 4.5 "Create email "Happening now"" on page 31.
- Confirm who will be the person supporting you with technical aspects in the other location.
- We recommend you to appoint an extra person in the other room to be in charge of collecting questions from the participants in that room, to write them in the chat in case the microphone isn't

working. This person should be additional to the person who supports you at the technical level because this optimizes time during the event.

Day of the event (1 hour to 30 minutes before event)

- Make a test with the presenter to confirm his/her equipment works fine. Make sure that: audio works fine, that you can see presenter's face clearly if the camera is on (ask him/her to have enough light), ask him/her to not speak too fast. If light isn't good, consider using a soft box.
- Open the meeting and make sure that
 - Presenters join enough time before event starts to make all works
 - Presentations are uploaded (if not done already). Follow manual 5.2 "Uploading content to online event" on page 51
 - Participants' settings are correct (muted/unmuted, as presenters/attendees, video on/off). Follow manual 4.1 "Create and configure online event" on page 24
- brief the presenters in both locations about technical aspects (where is the mic, camera, light, she/him, where to stand that's good for the visibility of the people joining in the room and the people joining online).
- set the audience and presenters right (mute-unmute, camera, etc.)
- open presentation (e.g. Power Point file)

During the event

- If you prepared a "Happening Now" email, send it a minute before the event starts (to prepare this email, follow manual 4.5 "Create email "Happening now"" on page 31).
- start recording meeting (if needed). See manual 4.4 "Record an event" on page 28
- Since the software does not provide statistics, ask presenter to ask participants "where are they from", or "from where are they watching". This helps the facilitation and kicks off interaction.
- Ask Chat moderator to welcome people in the chat. Instruct him/her to reply to questions of participants referring to them with their name, so that the chat thread is understandable.

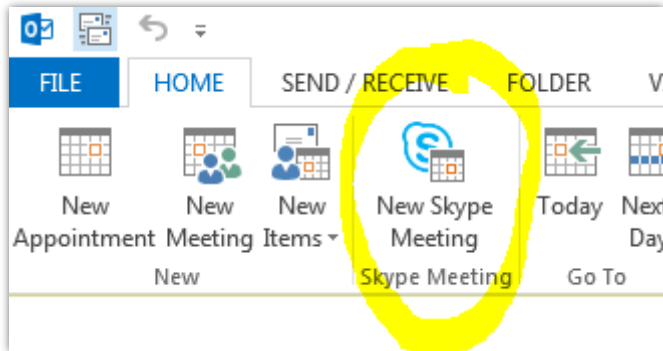
After the event

- Stop recording (if you started), and retrieve the video and save it. If needed, it can be uploaded to YouTube in a private channel for sharing on the intranet. Follow manual 4.4 "Record an event" on page 28
- Recommended: create a report page on your intranet and place a small intro (what was the event about), a link to the video, the presentation or files presented, etc.
- Send a "thank you" email to participants and point them to the report page.

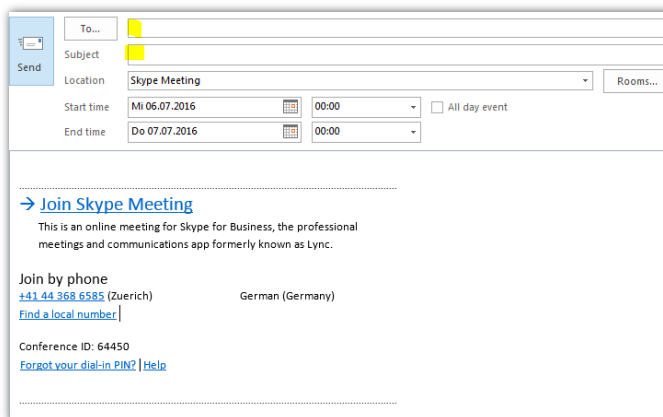
4. Technical manuals (organising)

4.1. Create and configure online event

- 1 In Outlook go to > calendar > click on “New Skype Meeting”

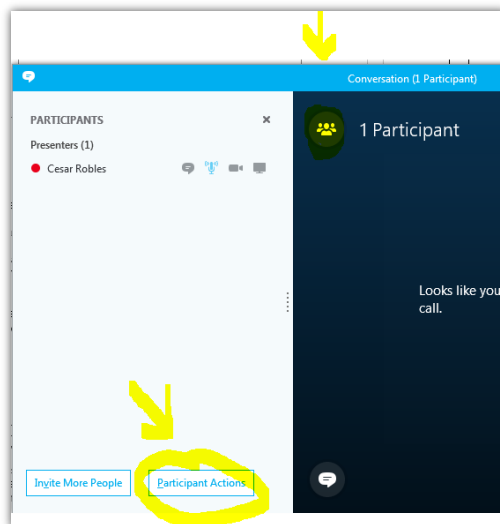


- 2 Fill in the details: subject, content (invitation text), select time and date and send the invitation to the presenter and audience.

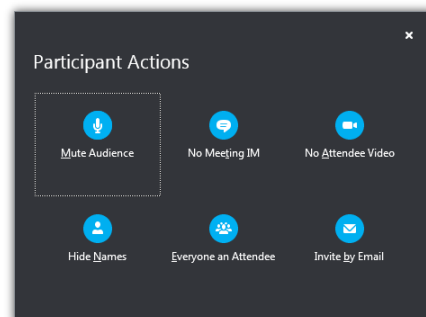
A screenshot of the 'New Skype Meeting' dialog box in Outlook. The 'To...' field is empty. The 'Subject' field contains 'Skype Meeting'. The 'Location' dropdown is set to 'Skype Meeting'. The 'Start time' is 'Mi 06.07.2016' at '00:00', and the 'End time' is 'Do 07.07.2016' at '00:00'. There is an 'All day event' checkbox which is unchecked. Below the fields, there is a blue link '→ Join Skype Meeting'. A paragraph of text reads: 'This is an online meeting for Skype for Business, the professional meetings and communications app formerly known as Lync.' Underneath, there is a 'Join by phone' section with the phone number '+41 44 368 6585 (Zuerich)', the location 'German (Germany)', and a link 'Find a local number'. At the bottom, the 'Conference ID: 64450' is displayed, along with links 'Forgot your dial-in PIN?' and 'Help'.

3 Open the event > click on “Join Skype Meeting” to set the “participant actions” (their rights in the meeting).

- click the icon “participants” (top left)
- click on “Participant actions, and set up so that participants have the right setting when the join the event.



- 4**
- (Recommended) Mute audience. If you don't mute audience, everyone who joins will have microphone open as a pre-set, and that can create troubles. You can give this right individually when someone joins.
 - No meeting IM. Use this if you don't want to have the chat box (IM means “Instant Messenger”)
 - No Attendee video. Close if you don't want all attendees to be able to start video. You can give this right individually when someone joins.



- Hide names
- (Recommended). Everyone as Attendee. Click this so that all people joining have the rights of attendees, instead of participants (which have full rights). You can make someone a presenter again when they join (right click on their name).
- Invite by Email. This generates an email with the link to the meeting, which you can send to anyone.

5 Once you set up meeting, you can simply hang up the call and this will end the meeting. You can re-join anytime.

6 Please note that the link “-> Join Skype Meeting” is the link to the actual meeting, so you can e-send via email to whomever you need, just copy-paste it to an email and send out.

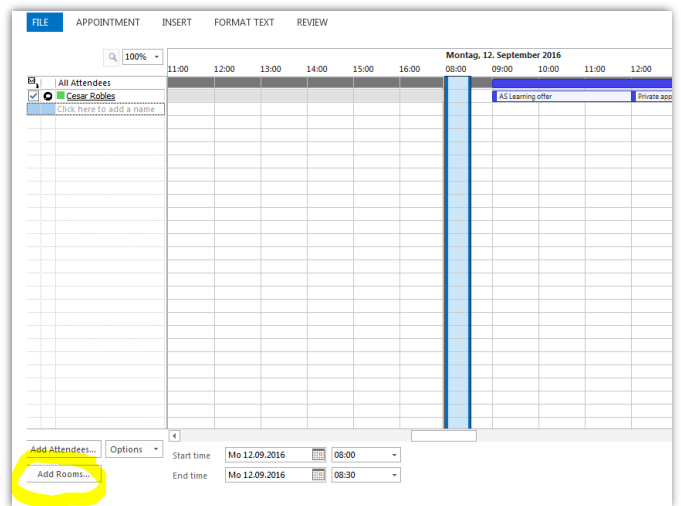


4.2. Booking rooms

If the presenter will seat in the office, book the room in Outlook calendar.

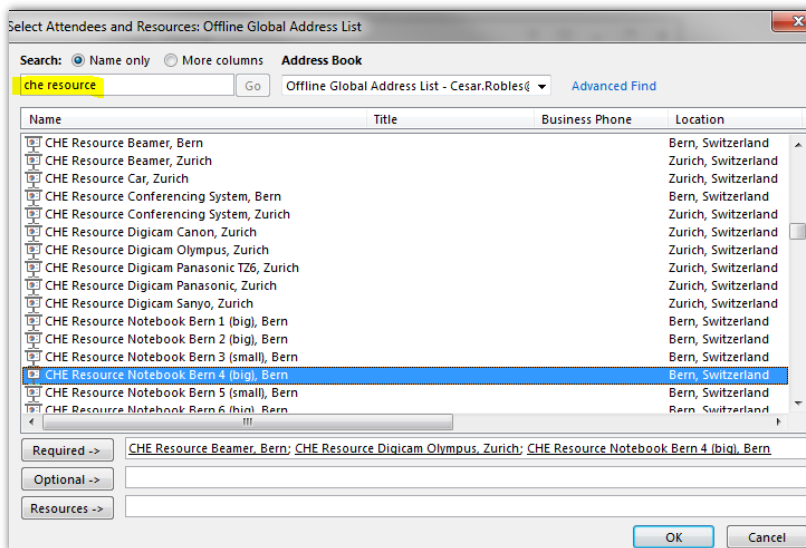
Outlook Calendar > New appointment > Appointment > Scheduling assistant > Add rooms

Tip: add 1 hr before and 1 hr after the official time of event, to have enough time for preparation and to tidy up the room after the event).

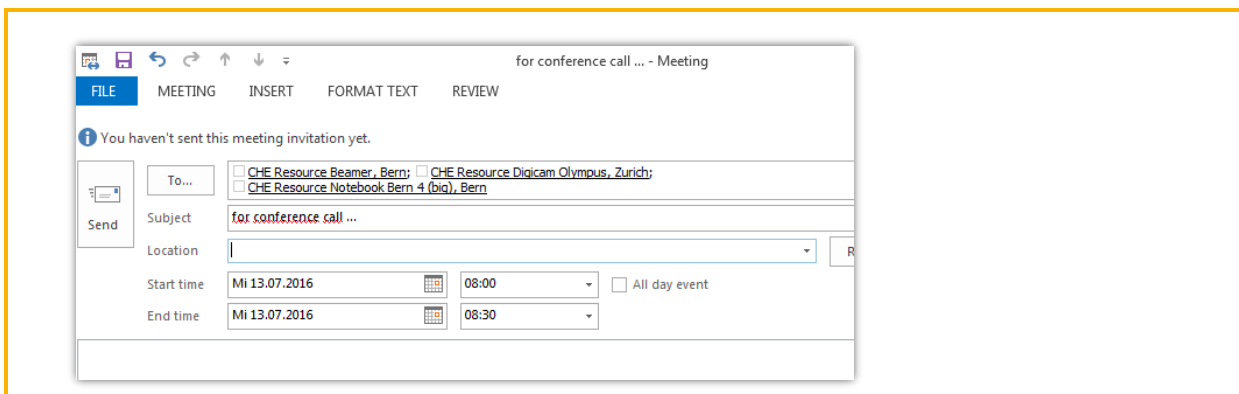


4.3. Booking equipment

- 1 Go to Outlook > Calendar > Appointment > To > Add the resources you need and click OK.



- 2 Add further details, like time and date. As per room (location), if you are following this manual, you should have already booked it 😊

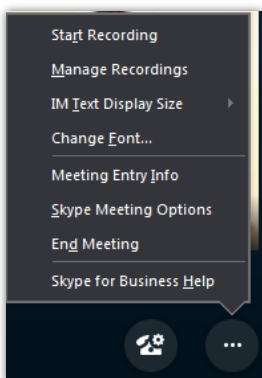


4.4. Record an event

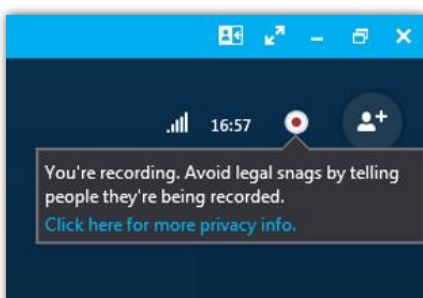
- 1 Once you are in the event (Skype for business meeting),
-> click on the “options” icon (circle with three dots at the bottom right of the call)



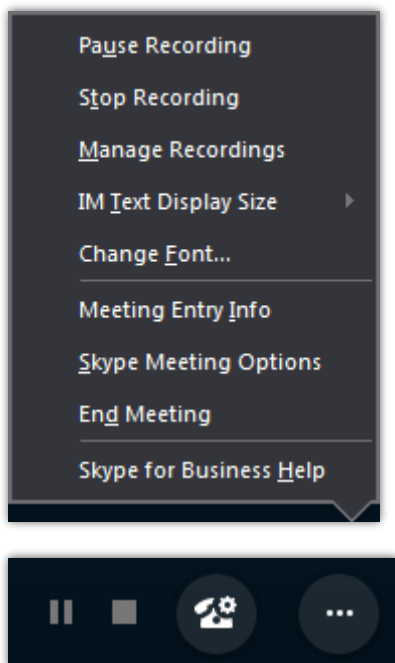
- 2 Click start recording



- 3 A red button will appear on top right, indicating that you are recording



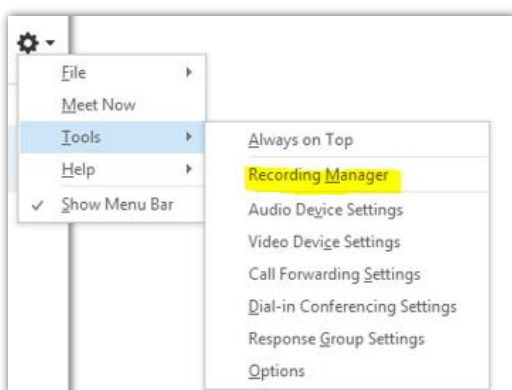
- 4 You can pause or stop the recording by clicking again on the “options” icon or in the icons that appear at the bottom.



5 Download the recorded video from any of these 2 places:

At the end of your training, click again on “options -> manage recording.”

If you closed the meeting, then go to your Skype for Business main window, open the Tools and then “recording manager”.



6 Optional: Upload and share the video on YouTube and the intranet.

- Save the video on the file server
- With authorization of the head of meeting, upload the video to YouTube Share the video with head of meeting and other approved recipients.

4.5 Create invitation email

<p>1 If it's a "blended event" (where people attend in a room but also online), use this template:</p>	<p>Subject: Join the meeting/online event "Title" – Weekday dd.mm.yyyy, 00:00 HRS (CET)</p> <p>Dear all</p> <p>We are delighted to present [topic, name of event] and invite you to join the [format of event (e.g. Mittagsclub or Brown Bag Lunch)] on [date, time]. It will take place in [room, city] and if you cannot attend personally, please join the skype meeting [link]. You will be able to submit your questions through the chat box.</p> <p>How to join the live-streaming:</p> <ul style="list-style-type: none"> • To join with your computer, open this link [link]. If you use your office computer, the link will open with your Skype for Business (if installed), and if you use a private laptop or you don't have Skype for Business installed, it will open in your web browser (please use Internet Explorer, not Firefox) • To join with your smartphone or tablet, download the Skype for Business App, and then open this link. [link] <p>See you online!</p>
<p>2 If it's an event only online</p>	<p>Subject: Join the online event "Title" – Weekday dd.mm.yyyy, 00:00 HRS (CET).</p> <p>Dear all</p> <p>We invite you to join the live-streaming/webcast of the "Title" on [weekday, dd.mm.yyyy, at 00:00 hr (CET)]. During the live-streaming, you will be able to submit questions for the presenter through the chat box.</p> <p>As preparation, we recommend you to read the short background note on this topic (file attached).</p> <p>How to join the live-streaming:</p> <ul style="list-style-type: none"> • To join with your computer, open this link [link]. If you use your office computer, the link will open with your Skype for Business (if installed), and if you use a private laptop or you don't have Skype for Business installed, it will open in your web browser (please use Internet Explorer or any other browser, except Firefox) • To join with your smartphone or tablet, download the Skype for Business App, and then open this link [link]. <p>If you can't join the live-streaming, you can download the presentation in this page [link].</p> <p>See you online!</p>

4.5. Create email “Happening now”

Copy-paste the below text and add the information of your event in the yellow sections. Save as a draft in your emails.

Subject: HAPPENING NOW! Online event on [title]. Join with your computer or smartphone

Content:

Français en bas / Español debajo

Join now this online event with your computer or smartphone:

- With computer: open the link “Join Skype Meeting”. If you don’t have Skype for Business installed, please open the link using Internet Explorer or any other browser except Firefox). If you have Skype for Business, the link will open using the program.
- With smartphone: download the Skype for Business App, and then open the link “Join Skype Meeting” and enter your name.

See you online!

EN VIVO AHORA! Evento en línea sobre [title]

Content: [short description]

Este evento en línea está siendo transmitido en vivo en estos momentos.

Para entrar, sigue los siguientes pasos:

- Para acceder con tu computadora, entra al link “Join Skype Meeting” con Internet Explorer o cualquier otro navegador a excepción de Firefox). Si usas tu computadora de oficina, el link se abrirá con el programa “Skype Empresarial” (si está instalado), y si utilizas tu computadora privada o si no tienes “Skype Empresarial” instalado, se abrirá en el navegador.
- Para acceder con tu teléfono celular (Smartphone) o tableta, baja la aplicación “Skype Empresarial” (o “Skype for Business”), y luego abre el link “Join Skype Meeting”

Durante el evento en línea podrás compartir preguntas en el chat, y si prefieres con tu micrófono, entonces te recomendamos tener tus audiófonos conectados.

Nos vemos en línea!

HAPPENING NOW! Online event on [title]

Content: [short description]

Vos désirez rejoindre le online event [title]:

- Pour y accéder avec votre ordinateur, ouvrez ce lien «Rejoindre Skype Meeting». Si vous utilisez votre ordinateur de bureau, ce lien sera ouvert avec votre Skype for business (si installé) ; si vous utilisez un ordinateur portable privé et que Skype for Business n’est pas installé, il sera ouvert dans votre navigateur Web (utiliser Internet Explorer ou autre navigateur sauf Firefox)
- Pour y accéder avec votre smartphone ou tablette : téléchargez Skype for business App, puis ouvrez le lien «rejoindre Skype Meeting

See you online!

5. Request support

If you are interested in receiving support from Helvetas to assist you in organising and implementing online events, please get in touch with the KNL team (knl@helvetas.org), providing details of your upcoming event (date, time, stakeholders) and requesting a proposal (which includes quotation).

6. Feedback

We welcome any feedback about this manual, to its@helvetas.org and knl@helvetas.org

Thank you.

JOINING AN ONLINE EVENT

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1. Quick manual to join an online event

This manual shows the basic steps to join online events, for fast preparation. Please note these instructions aren't detailed but they are sufficient to prepare for an online event.

Connect hardware

Connect the external hardware (headset, speaker, microphone, webcam etc.) if needed

Check audio and video settings

Check that the right audio and/or video hardware is set as default in Skype for Business.

Join meeting

Click provided link.

Make sure the link opens in Internet Explorer (not Firefox or Chrome) if Skype for Business is not installed on your computer.

2. Detailed Manual to join online event

The event itself takes place online and is created by the head of meeting.

This guide covers the different scenarios of each isolated location that joins the online event. Search for yours depending on:

- How many persons join the event together?
- What level of interaction is expected?

3. Scenarios for joining an online event

The head of the meeting will send you a link “→ Join Skype Meeting” along with a short summary of the type of the meeting:

With this information, along with the number of people joining from the same location, you will be able to identify the scenario that fits your needs.



Audience (1 person)

Audience joins online from individual computer

See page 37



Presenter (1 person)

Presenter makes presentation from individual computer

See page 38



Audience (up to 3 persons)

Audience sit together in a room or office

See page 39



Presenters (up to 2 persons)

Presenters make presentation from individual computer

See page 40



Audience (up to 10 persons)

Audience sit together in a room

See page 41



Presenters (up to 7 persons)

Presenters and audience are in the same room

e.g. Team Meeting

See page 42



Audience (up to 20 persons)

Audience sit together in a big room

e.g. receiving end of Mittagsclub

See page 43



Presenter with live audience (up to 20 persons)

Presenters and audience are in the same room

e.g. sending end of Mittagsclub

See page 44





Presenter with interactive audience of 20+

Presenters and audience are in the same room. Audience participates actively (questions)

e.g. All Staff Meeting

See page 46

 = presenter (speaker, interactive participant) /  = audience (listener, silent participant)

3.1. Audience (1 person)

Presenter makes presentation from individual computer



Connect hardware

Connect headset to computer

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

- Headset must be set as default microphone
- Headset must be set as default speaker
- Built-in webcam must be set as default

Join meeting

Click provided link

Resources

- Computer
- Headset
- Internet (preferably cable, not wireless)
- Optional*: Webcam (built-in)

Environment

Anywhere

Option

Possible participation by chat (asking questions) only if encouraged by presenter.

Start webcam (the head of the meeting might request this)

3.2. Presenter (1 person)

Presenter makes presentation from individual computer



Connect hardware

Connect headset to computer

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

- Headset must be set as default microphone
- Headset must be set as default speaker
- Built-in webcam must be set as default

Join meeting

- Click provided link
- Start webcam
- Unmute microphone

Resources

- Computer
- Headset
- Webcam (built-in)
- Internet (preferably cable, not wireless)

Environment

Quiet (workplace or home)

3.3. Audience (up to 3 persons)

Audience sit together in a room or office



Connect hardware

Connect headset to computer

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

- Built-in speaker must be set as default speaker
- Built-in webcam must be set as default

Join meeting

Click provided link

Resources

- Computer
- Speaker (built-in)
- Small meeting room
- Internet (preferably cable, not wireless)
- Optional*: Webcam (built-in)

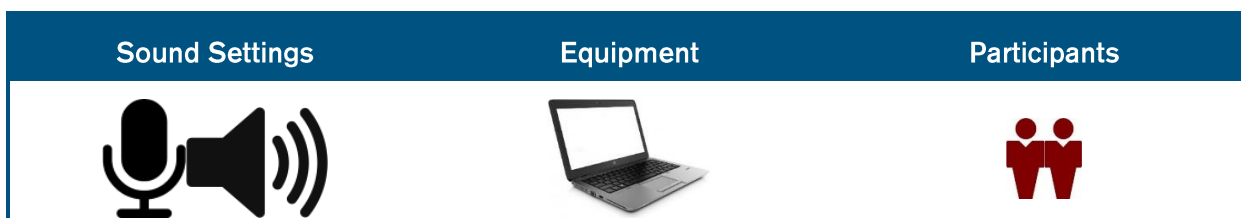
Option

Possible participation by chat (asking questions) only if encouraged by presenter.

Start webcam (the head of the meeting might request this)

3.4. Presenters (up to 2 persons)

Presenters make presentation from individual computer



Connect hardware

Connect headset to computer

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

- Built-in microphone must be set as default microphone
- Built-in speaker must be set as default speaker
- Built-in Webcam must be set as default

Join meeting

- Click provided link
- Start webcam
- Unmute microphone

Resources

- Computer
- Speaker (built-in)
- Microphone (built-in)
- Webcam (built-in)
- Small meeting room
- Internet (preferably cable, not wireless)

3.5. Audience (up to 10 persons)

Audience sit together in a room



Connect hardware

Connect external speaker to Conferencing System

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

- External Speaker must be set as default Speaker
- Built-in webcam must be set as default

Join meeting

- Click provided link

Resources

- Conferencing System
- External speaker
- Meeting room
- Optional*: Webcam (built-in)
- Internet (preferably cable, not wireless)

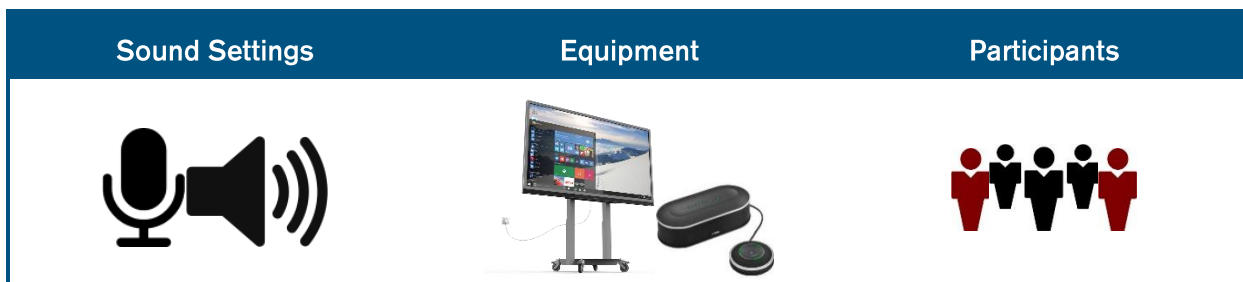
Option

Possible participation by chat (asking questions) only if encouraged by presenter.

Start webcam (the head of the meeting might request this)

3.6. Presenters (up to 7 persons)

Presenters and audience are in the same room



Connect hardware

Connect external speaker and external microphone to Conferencing System

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

- External microphone must be set as default microphone
- External speaker must be set as default speaker
- Built-in webcam must be set as default

Join meeting

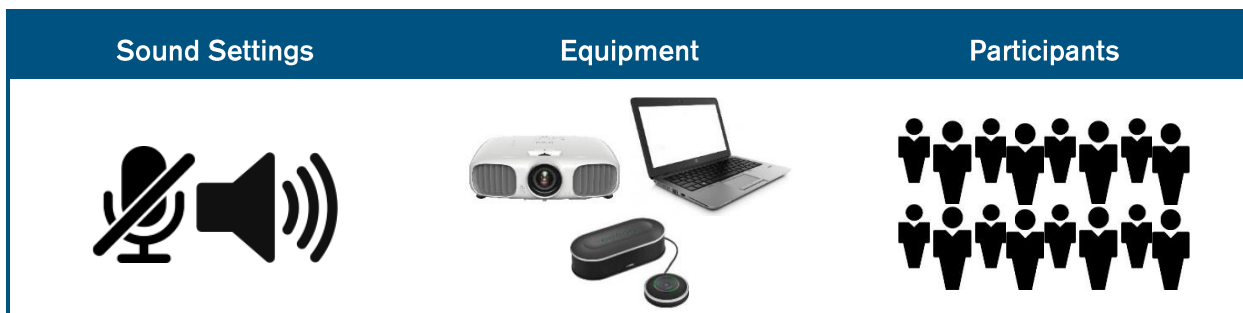
- Click provided link
- Start webcam
- Unmute microphone

Resources

- Conferencing System
- External speaker
- External microphone
- Webcam (built-in)
- Meeting room
- Internet (preferably cable, not wireless)
- Join meeting (click provided link)
- Start webcam
- Unmute microphone

3.7. Audience (up to 20 persons)

Audience sit together in a big room



Connect hardware

Connect beamer and external speaker to laptop

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

- External speaker must be set as default speaker

Join meeting

- Click provided link

Resources

- Laptop
- Beamer and screen
- External speaker
- Big meeting room
- Internet (preferably cable, not wireless)
- Optional*: Webcam (built-in or external)

Option

Possible participation by chat (asking questions) only if encouraged by presenter.

Start webcam (the head of the meeting might request this)

3.8. Presenter with live audience (up to 20 persons)

Presenters and audience are in the same room



Connect hardware

Connect beamer, external speaker and external microphone to laptop

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

- External microphone must be set as default microphone
- External speaker must be set as default speaker
- Built-in webcam must be set as default

Join meeting

- Click provided link
- Start webcam
- Unmute microphone

Resources



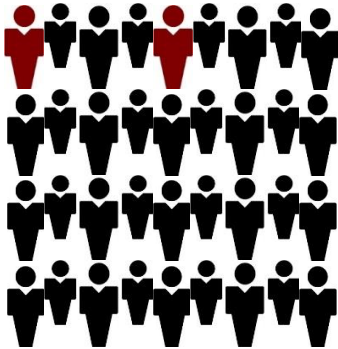





- Laptop
- Beamer and screen
- External speaker
- External microphone
- Webcam (built-in)
- Softbox
- Big meeting room
- Internet (preferably cable, not wireless)

Note

Questions from the live audience will have to be repeated by the presenter for the online participants to understand.

3.9. Presenter with interactive audience of 20+

Presenters and audience are in the same room. Audience participates actively (questions)

Sound Settings	Equipment	Participants
		
		
		

Connect hardware

- Connect beamer, external speaker and external microphone to laptop. Capture presenter with built-in webcam (rise to the height of his/her face for better angle)
- Use Conferencing System to show presenter from other location in full size. Use built-in webcam to capture local audience
- Use standalone Laptop for facilitation (mute/unmute/lock video etc.) and to connect with other locations by chat for questions and problems.

Check audio and video settings

See manual 5.1 “Audio and video settings in S4B” on page 50

Join meeting

- Click provided link
- Start webcams and unmute microphones as needed

Resources

- 2 Laptops and Conferencing System
- Beamer and screen
- External speaker and microphone
- Big Meeting room
- 2 Webcams (built-in)
- Softbox
- Internet (preferably cable, not wireless)

4. Available equipment

Meeting room equipment (fixed)



Screen (Crete) or white wall (Bohol, Bornholm, Rinca) to project presentation with beamer.



Beamer to project presentations to screen or white wall. Installed in Crete, Bornholm and Bohol. Additionally, there are mobile beamers available in Bern and Zurich.

Mobile meeting room equipment



Prowise Conferencing System based in Rhodes and Bohol. They can both be booked in outlook and moved to another meeting room.

move, plug in power cord, switch on



Polycom "spider" Soundstations are based in Bohol and Rhodes.



Yamaha Conference Speakerphone is based in Crete and can be used instead of the "spider".



Logitech Conference Cam can be borrowed from the self-service cupboard in the IT offices.



There are additional laptops in the self-service cupboard in the IT offices. They can be booked in outlook.



Microphones



Softbox for better lightning of the presenter in rooms that are darkened for better vision of a presentation

Personal equipment



Every collaborator has a personal computer that he/she can use for conferences.



Every collaborator has a personal headset that he/she can use for phone calls and conferences.

5. Technical manuals (joining)

5.1. Audio and video settings in S4B

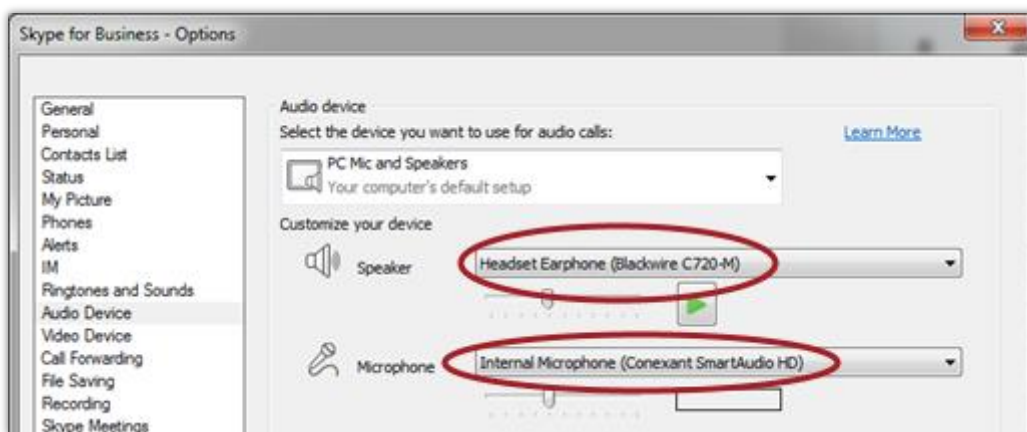
- 1 Set audio settings in Skype for Business BEFORE joining/initiating the conference.

Click gear wheel in Skype for Business main window 

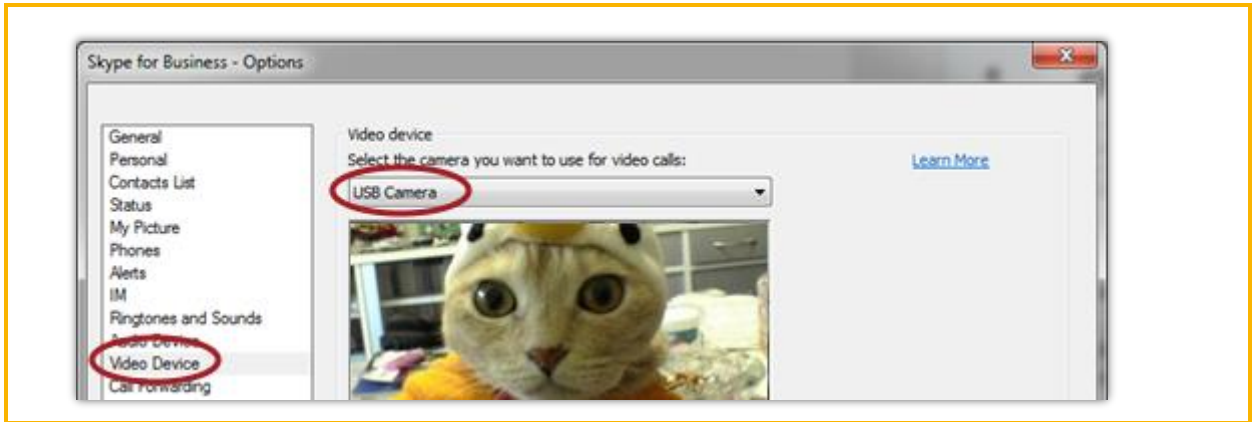
Select the appropriate hardware



- 2 Select "PC Mic and Speakers" if you want to choose speaker and microphone hardware individually.



- 3 Do the same for your video device



5.2. Uploading content to online event

- 1 Enter the meeting. Click on the “Join skype meeting” link and then OK in the dialogue window.

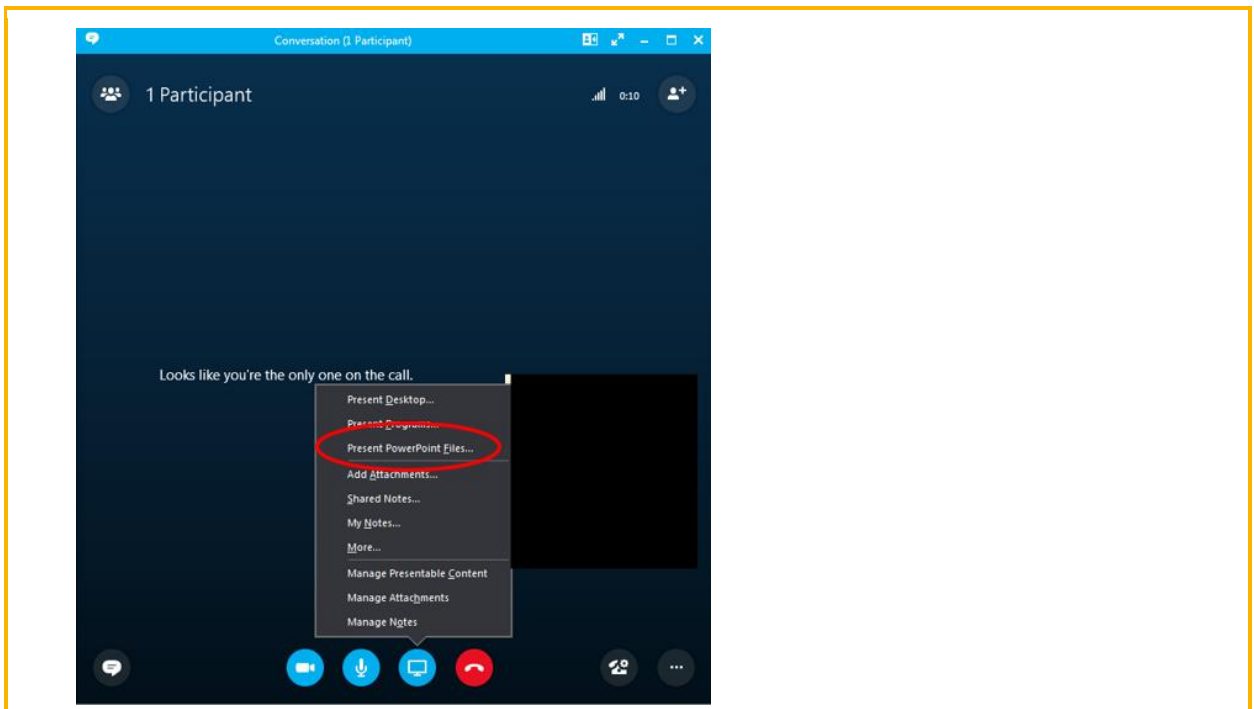
→ [Join Skype Meeting](#)

This is an online meeting for Skype for Business, the professional meetings and communications app formerly known as Lync.

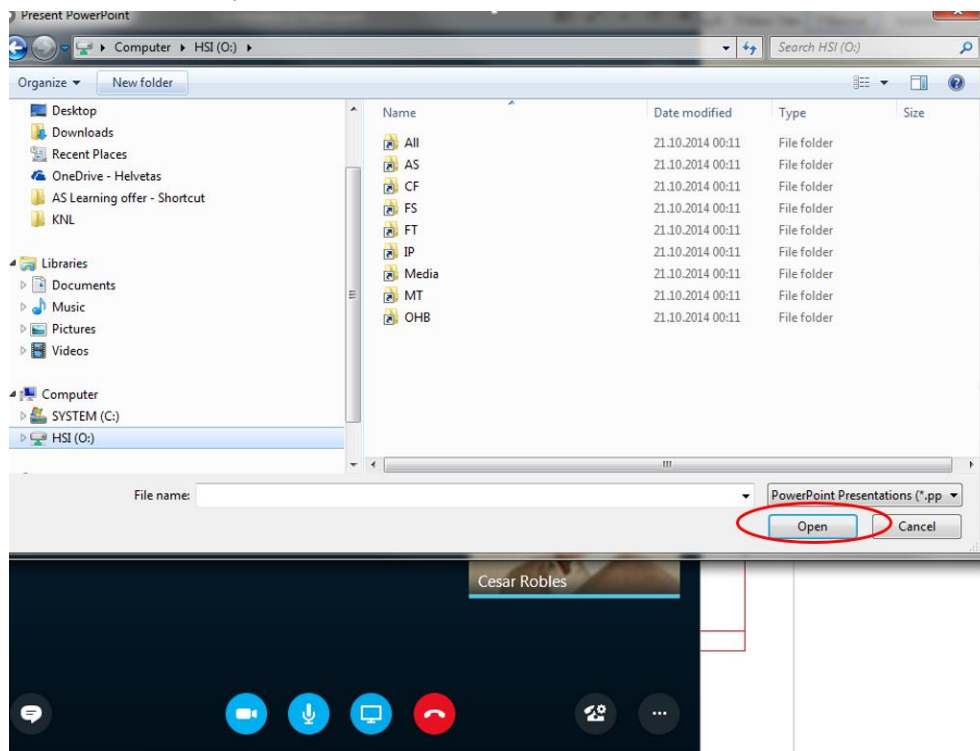
Join by phone
[+41 44 368 6585](#) (Zuerich) German (Germany)
[Find a local number](#)

Conference ID: 64450
[Forgot your dial-in PIN?](#) | [Help](#)

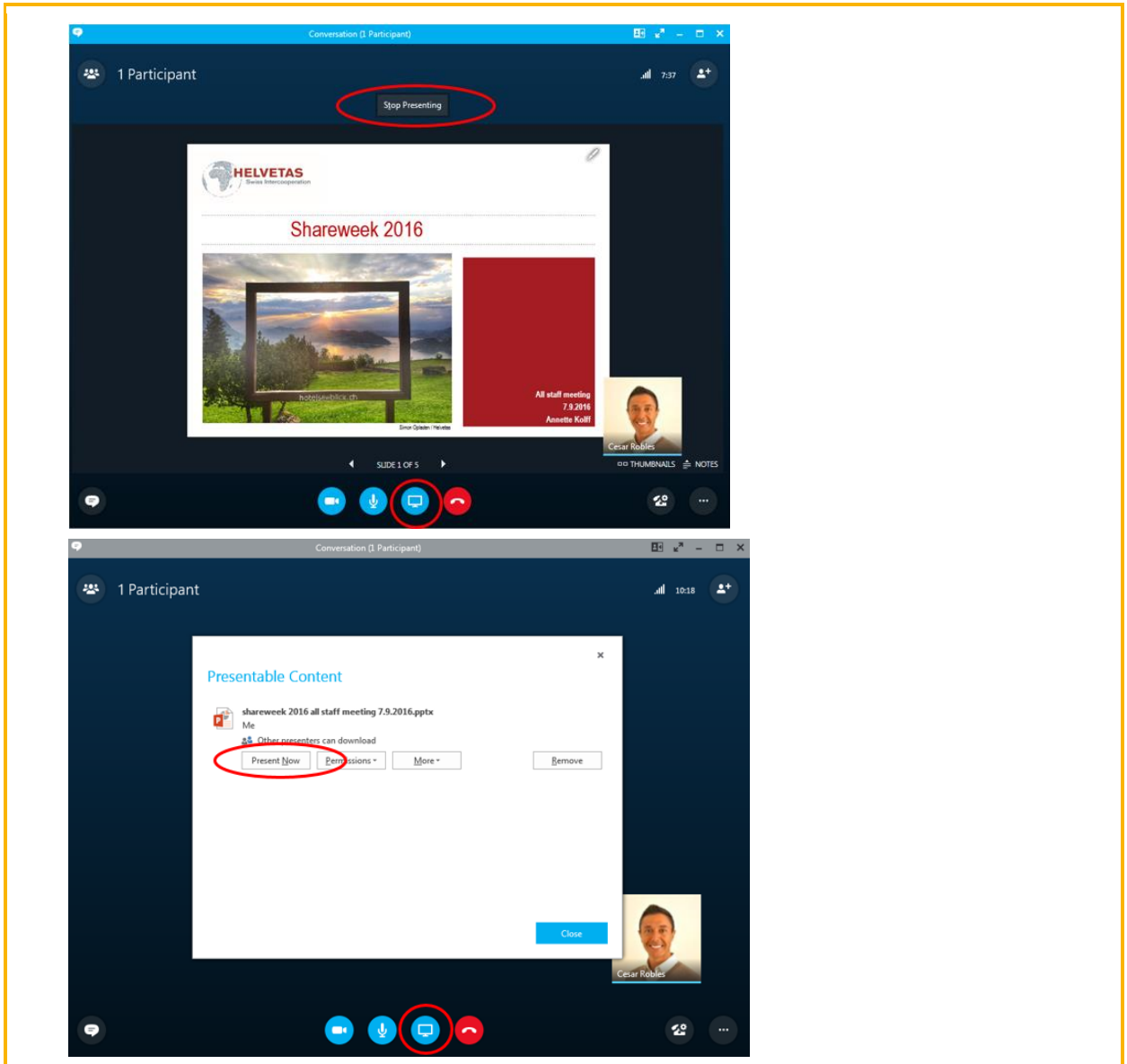
- 2 Click on the “screen” icon and select “Present Power Point files”



3 Select the file that you want to upload and click “open”



4. The Power Point will be shown automatically, but you can close it by clicking on the button on top “Stop presenting”, and you can open it again by clicking on the “screen” icon and then “manage presentable content”. The file will be listed there, to start showing to your audience click “



Owner (Function & Name):	Carmen Schneider (ITS)/Cesar Robles (KNL)
Version (First/Latest):	12.04.2018/31.05.2018
Original Path:	O:\AS\Teams\KNL\Topics\Manual online event facilitation\Public Manual for Online Events