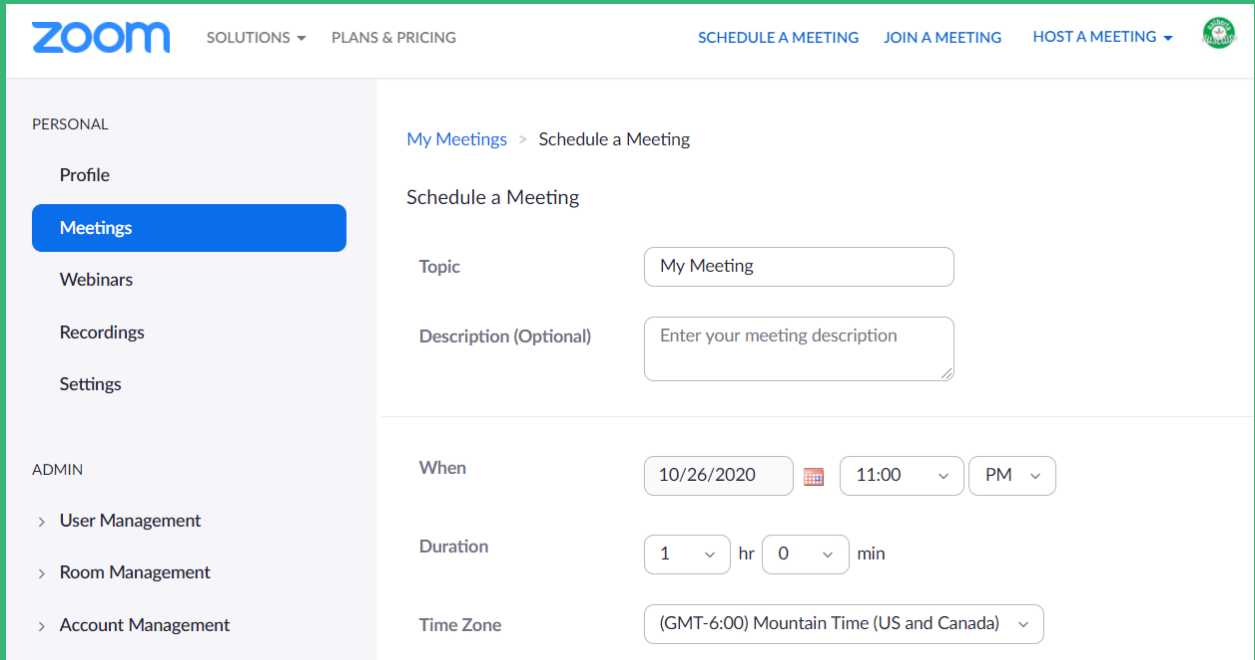# Online and livestream events guide

The Sustainability Council's internal guide for hosting events using Zoom, Teams, YouTube, Facebook Live, and other online meeting or webinar software. Includes timelines, processes and best practices.

S setup of the event

As of Oct. 2020, our default meeting platform is Zoom using the large meeting add-on. Free registration for events is handled by Eventbrite.
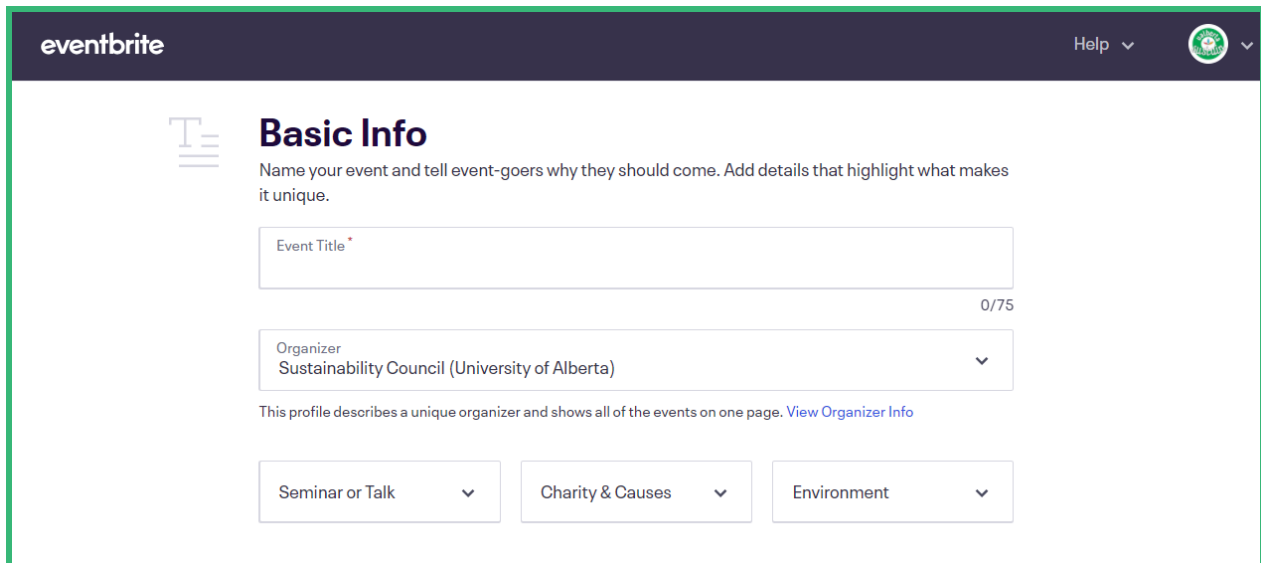
Setting up Zoom Meeting

Schedule meeting at zoom.us using the sustainability@ualberta.ca account.

- Schedule the times to match the actual event e.g. Noon–1 p.m. (although it doesn't actually matter, it's just for people's calendars)
- Generate the meeting ID automatically (do not use personal meeting ID)
- Waiting room or password? You must choose one.
  - Set a password if you can strictly control audience access through Eventbrite
  - Use a waiting room if the Zoom link is circulating or if your platform does not time-gate access to the event.
- Allow telephone audio
- Disable join before host
- **Mute participants upon entry**
- Allow unauthenticated users (**important for Eventbrite**)
- Automatically record meeting to the cloud

Setting up Eventbrite

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We use Eventbrite to handle registration for two reasons: (1) it allows us flexibility with the streaming platform without having to circulate new links if we change things, and (2) it sends automated reminder emails that should help our events stay top-of-mind in this competitive environment. Additionally, Eventbrite gives us good analytics, a registration list, and the ability to email a follow-up after the event.

Start by making a copy of the template event, and then adjust all appropriate fields. The template event has pre-programmed certain features, but the process is roughly:

- Basic Info
  - Fill out all the Basic Info
  - For Location, choose "Online event"
- Details
  - Upload the "feature-x.jpg" image from the project's Design folder on Google Drive (it should already be formatted to 2000 x 1000 pixels)
- Online Event Page
  - Click on Connect Zoom
  - Follow prompts to connect to your Zoom account (potentially requires signing into Zoom)
  - Since you've already created a Zoom meeting, follow the prompt to "Connect to an existing Zoom meeting." (The dropdown menu is also a search box.)
- Tickets
  - Free
  - Set Quantity to 100 or 500 or 1000 (depending on your Zoom account's capacity) or Set Quantity to 300 (with Microsoft Teams)
  - Sales should end when the event ends (so that people can join during the event)
- Publish
  - Set to Public so that anyone can find the event by searching Eventbrite

The order form should have three custom questions:

- Radio buttons, mark as required.
  Would you like to sign up for Sustainability News, our email newsletter?
  - Yes, please.
  - No, thanks.
- (Optional) Could you please share your affiliation to the University of Alberta?
  - Student
  - Academic Staff
  - Support Staff
  - Alumni
  - N/A

Under Marketing, there should be a number of Tracking Links already created

- fyi, em, snews, cta, an, cis, uaevents

Other preparations

Google Calendar

The event lead or designate should create a Google Calendar event and invite key participants:

- Presenter
- Moderator
- Assigned staff from the Sustainability Council
- Sustainability Council director and associate directors
- Research Steering Committee

These people do not need to register through Eventbrite. Provide the direct Zoom meeting link in the Google Calendar event so they can join directly at any time. However, ask them not to circulate the link (especially if the waiting room is disabled).

Recording settings

Under the Zoom account settings, there is a tab for Recording that has some useful options. These settings are optimized for us to be able to post the recording to YouTube afterward.

- Enable cloud recording
- Enable **"Record active speaker, gallery view and shared screen separately"**
- Disable "Record an audio only file"
- Disable "Add a timestamp to the recording"
- Disable "Display participants' names in the recording"
- Enable **"Optimize the recording for 3rd party video editor"**

It can also be nice to check:

- Enable "Save chat messages from the meeting / webinar"
- Enable "Save poll results shared during the meeting / webinar"

You can also enable "Automatic recording" if the account is only being used for events.

Run-through with the presenter

1–2 weeks before the event, run through some technical and programming details with the presenter(s).

Tech Check Checklist

Copy this list into a new document and save in Google Drive. **Bold** the answer or provide notes.
If any issues arise, communicate them to the program lead.

What device is the speaker using?

- Laptop, desktop or tablet
- Good wifi or wired connection?

How is their audio?

- Headset or plug-in microphone? Earbuds with a mic?
- Is there background noise potential e.g. barking dog, fan noise?

How is the location?

- Is this the location they will present from?
- Good lighting? Natural daylight is awesome, but not direct sunlight.
- No backlighting
- Backdrop is not too distracting
- We recommend against a virtual background, but if they want it, is the greenscreen seamless?

How is the camera positioning?

- Position just above eye level
  - If laptop or tablet, use a shelf or stack of books to raise the camera up
- Look close to the webcam
  - Move the Zoom thumbnails over to the camera, or vice versa

What web conferencing features are needed?

- Slideshow? Who controls the slideshow, speaker or host?
- Audience can turn on video OR can only use chat for Q&A?
- Breakout rooms
- Polls

Final details

Phone number to reach presenter for urgent tech support: _____

Recommend they dress in something comfortable, mid-range colours, matte fabrics. Avoid checkered patterns, deep black or bright white.

Give the presenter our tip sheet: [What It Takes to nail an online presentation](#)

Running the event

To ensure our online event runs smoothly, despite any technical difficulties that may arise, we require at least three staff present to fill the following roles.

Roles for live event

Zoom host

This person is not on camera, they're just responsible for keeping Zoom running smoothly.

- Login as Zoom Host 45-30 minutes before the event. You must login first so that other staff can skip the registration screen and join the meeting directly.
- Check all of the following settings:
  - Security
    - Do not allow participants to share screen
    - Allow participants to chat
    - Allow participants to rename themselves
    - Do not allow participants to unmute themselves
  - Participants
    - Use this panel to make key participants into co-hosts
      - The Event Host should be co-host to help manage
      - The Moderator may wish to be co-host, so they can unmute at will
  - Chat
    - Make sure participants can chat with everybody (not only to hosts)
  - Recording
    - Ensure that the **cloud recording** has started well before the event begins (we can always edit it later).
  - Other features
    - Depending on what was discussed during the Tech Check, ensure that appropriate features are enabled (breakout rooms, polls, etc.)

During the meeting:

- Play welcome screen slideshow (if available) before the event officially begins.
- Manage the waiting room, letting people in starting 5 minutes before the event.
- If required, share your screen to play pre-recorded video.
  - Play downloaded video file from the computer, preferentially.
  - Set audio to 50–75% (test to see what is comfortable)
  - For the best broadcast quality (currently up to 720p resolution):
    - When starting the screen share, make sure to check the boxes for "Share computer sound" and "Optimize Screen Share for Video Clip"
    - Put the video into fullscreen
- If a participant attempts to zoom bomb or otherwise make trouble, you can (in escalating levels):
  - kick the participant to the waiting room
  - ban the participant
  - close the meeting to all new participants

- Stop screen share during Q&A so that audience can see speaker

Event host

This person is the face of the organizing team. They don't spend a lot of time on camera, but they are present to ensure everything runs smoothly, and that the audience is taken care of.

- As the waiting room opens and people begin to enter the event, say the occasional welcoming comment to let people know that we will be starting in a few minutes (and that their audio works).
- Know the schedule of the event, and help keep everyone on time.
  - If the Q&A is going long, let the moderator know it is time to take one last question. If needed, make an intervention on video.
  - If there are technical issues, you step in to speak to the audience and smooth it over.
- At the end of the meeting, invite people to the next event in the series and thank the moderator and participants.
- If there is no Introducer, then you will take on this role. We don't recommend that you also take on the moderator role, however.
- Keep track of the number of people in the audience. Record the peak number.

Introducer (optional)

This is normally a role for a senior academic, such as an associate director. Depending on their time commitments and readiness, the role can be combined with that of the Event host.

- When it is time to start the event, give a land acknowledgement and introductory remarks. These may have been prepared by staff in advance.

Moderator

This role can be taken on by the Introducer, as it is a role well suited to another senior academic. However, we don't recommend one person take on Event host, Introducer and Moderator.

Moderate the Q&A much as you would an in-person event.

- Have two initial questions ready to go to start the discussion. Don't turn to the audience straight away, but encourage them to think of questions while you start it off.
- For a panel, a question might come in that is for any panelist to answer. Instead of leaving it open, ask the question to a specific panelist, and then ask others to follow up.
- Not every panelist needs to answer every question, but do pay attention to make sure each panelist is getting time in the limelight.

In terms of what's different by virtue of it being on Zoom:

- Watch the chat box for questions throughout the event. ***Zoom chat isn't very good,*** and it can be easy to lose track of questions—we recommend you move questions out of chat: copy+paste questions to a Google Doc or write them down on paper, whatever is easier for you.
  - You can arrange for the Event host to move questions over to the Google Doc if the event is large enough that you would like support.
- If the event team has agreed that audience members can ask questions directly:

- ○ Ask the audience member to turn on their camera / unmute and then welcome them to the stage. This helps them know what to do, and also lets the rest of the audience know what's happening.
- People may be uncomfortable speaking on camera. If this is something the presenters would like, discuss ways to warm up the audience e.g. having some breakout rooms for icebreakers at the beginning of the event.

Notes on Recording

The Zoom cloud recording will default to speaker view. If you would also like a gallery view recording, you must use two devices and start the gallery first. Alternatively, you can do a screen recording with OBS Studio.

Creative Decisions

Just some additional considerations that didn't fit anywhere else.

A talk can be pre-recorded, and then the speaker can be present for a live Q&A. This ensures we have a presentation to play if the speaker's video goes down the day of the event.

If resources allow, create a waiting room slide with music and countdown timer. This lets people know their audio is working when they tune-in. (Super cheap trick: google countdown timer and share screen).

Decide whether to ask the audience to have videos on or off. Some presenters like to be able to see who they're speaking to; some organizers prefer to put the viewers' focus just on the speaker.

Follow-up to the event

Push additional content for those who missed the event

Working with the presenter, you can post on social media:

- Answers to top 5 questions from the event
- Link to their book, research project or paper

Download Eventbrite analytics

Eventbrite > Reports > Online event data (a custom report)

Notes on using Microsoft Teams

Log out of Office 365 if you are logged in.

http://teams.microsoft.com

Login using special ALES user:

Firstname.Lastname@ales.ualberta.ca

Password is same as for logging into Windows

Go to Calendar

Dropdown menu next to Create Event. Second option is Live Event.

Schedule as usual.

Publish the "Attendee Link" to website or send through Eventbrite, etc.

Add guest to a team.

Then add the guest to an event for that team.

Other temporary notes

https://twitter.com/ryankatzrosene/status/1270809093423484928

Less time in meetings, more time creating together.