Lync Meeting Checklist

We’ve developed the following checklist for meeting organizers and presenters.

1. Scheduling the meeting
   - Schedule the meeting using Outlook. Go to calendar view and look for the New Lync Meeting button or Online Meeting button (Mac).
   - If the meeting includes more than 10-15 people, click on Meeting Options or Online Meeting > Set Access and Permissions (Mac) to limit presenters and/or participation.
   - If the meeting is recurring, make sure to place an end date less than 365 days away.
   - Include the instructions on how to join the meeting: technology.ku.edu/joining-lync-meeting.

Note: At this time, you can’t schedule a Lync meeting on behalf of someone like you do a normal meeting, but there is a work around. See “Schedule on a meeting on behalf of someone else: at technology.ku.edu/lync/meetings-presenters.

2. Getting set up for the meeting
   - Set up or upload presentation content into the meeting space.
   - If the meeting includes all KU contacts, create a contact group within Lync with the meeting attendees.
   - If you are going project, connect to the projector. If you are using a PC, remember to select the Windows key + P to start the display.
   - Select and test your audio device. Connect to a Lync-certified audio device if necessary. Test your audio by clicking on the device icon in the lower-left corner of the Lync interface and then choosing Audio Device Settings. Choose Check Call Quality to run the wizard.
   - Prepare to record by plugging in to a power source.

3. Starting the meeting
   - Start (join) the online meeting using one of the following methods:
     - Click on Join Lync Meeting in the Outlook meeting request.
     - From the Microsoft reminder pop up, click Join Now.
     - From the Lync Calendar view, double-click the Lync meeting. (It will appear in blue).
   - Admit any attendees from the virtual lobby. Usually only attendees who don’t have Lync and who join using the Web App as a Guest will wait in the virtual lobby.
   - Remind attendees of the best practices:
     - Use a wired connection whenever possible.
     - Use a Lync-certified audio device and mute yourself when not speaking.
   - If you are recording, start the recording by selecting the ellipses in the lower right corner of the meeting screen and selecting Start Recording. If the recording option is dimmed, your audio might not be connected. Click the mic/phone icon to connect audio, then try again.
     - Make sure to notify attendees that you are recording. Also, let them know what you plan to do with the recording after the meeting.
4. Conducting the meeting
   □ View and change participant rights as needed. Pause on the people icon to manage participants individually or as a group.
     ○ To add additional participants, click **Invite More People**, and find or select the people you want to invite (only works with KU contacts).
     ○ To mute, unmute, make presenter/attendee, or remove from the meeting, on the Participants tab, **right-click a person’s name** and use the options.
   □ Present content by hovering over the monitor icon and choosing a collaboration icon.

5. Ending the meeting
   □ If you just want to exit the meeting and let others stay connected, simply close the meeting window. OR …
   □ To remove everyone from the meeting, click **More Options (…)** and then click **End Meeting**. Click **OK** on the prompt to continue. This closes the window and disconnects everyone from the meeting, including those participants who called in.

6. After the meeting
   - You will need to first upload the recording to a media hosting service, such as KU’s Media Hub. From there, you will get a URL to share with others or embed on a Web page.

<table>
<thead>
<tr>
<th>Quick Link</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>technology.ku.edu/joining-lync-meeting</td>
<td>• Directions for joining a Lync meeting based on the type of attendee</td>
</tr>
<tr>
<td>technology.ku.edu/lync</td>
<td>• General information about Lync</td>
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<td></td>
<td>• Information about recommended devices</td>
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<tr>
<td></td>
<td>• FAQs</td>
</tr>
<tr>
<td>technology.ku.edu/lync/meetings-presenters</td>
<td>• PC directions for presenters/meeting hosts</td>
</tr>
<tr>
<td>technology.ku.edu/lync/participate-online-meetings</td>
<td>• PC directions for attendees</td>
</tr>
<tr>
<td>technology.ku.edu/lync-2011-mac/online-meetings</td>
<td>• Mac directions for scheduling Lync meetings</td>
</tr>
<tr>
<td>technology.ku.edu/lync-web-app</td>
<td>• Directions for the Lync Web App</td>
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