

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.

Quick Link	Contains
technology.ku.edu/joining-lync-meeting	<ul style="list-style-type: none">• Directions for joining a Lync meeting based on the type of attendee
technology.ku.edu/lync	<ul style="list-style-type: none">• General information about Lync• Information about recommended devices• FAQs
technology.ku.edu/lync/meetings-presenters	<ul style="list-style-type: none">• PC directions for presenters/meeting hosts
technology.ku.edu/lync/participate-online-meetings	<ul style="list-style-type: none">• PC directions for attendees
technology.ku.edu/lync-2011-mac/online-meetings	<ul style="list-style-type: none">• Mac directions for scheduling Lync meetings
technology.ku.edu/lync-web-app	<ul style="list-style-type: none">• Directions for the Lync Web App
office.microsoft.com/en-us/lync-help/training-courses-for-lync-2013-HA104032084.aspx	<ul style="list-style-type: none">• Microsoft training courses for Lync 2013