

DIY Pre-Launch Checklist for Live Activities

Site Administration

<p>Site Subscription</p>	<ul style="list-style-type: none"><input type="checkbox"/> Review the Site's phase information to ensure the Participant Access dates are correct. <p><i>Participant Access must be active on the Site for Participants to register an account. If access has not yet started, you can change the start date tied to your subscription. Only Analyst-level account holders will have access to the Site Administration area of a Site.</i></p> <ul style="list-style-type: none"><input type="checkbox"/> Review the Site's Service Limits (e.g Live Video Minutes) to ensure that there are Live Video Minutes on your Site. You can contact saleshelp@recollective.com to purchase any additional minutes, or wait until your project is over to purchase. <p><i>Participants will never be prevented from participating in Live Activities if Service Limits have been exceeded. Export functionality of any recordings will not be available if you've exceeded these limits. The ability to export recordings from the platform will be restored once additional minutes have been purchased.</i></p>
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Study Settings

<p>Client Permissions</p> <p><i>By default, Client accounts have very limited permissions within a Study. They</i></p>	<ul style="list-style-type: none"><input type="checkbox"/> Review Client Permissions<ul style="list-style-type: none"><input type="checkbox"/> If you would like your Clients to be permitted to join the backroom of a Live Video Interview or Group Chat you
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<p><i>begin as observers but more permissions can be granted.</i></p>	<p>will need to enable Collaborate in backroom in Study Admin>Study Settings>Permissions.</p> <p><input type="checkbox"/> If you would like your Clients to be permitted to join the front room of a Live Video Group Chat, the permission to Interact with participants will also need to be enabled.</p> <p><i>Note: This permission will allow Clients to leave comments on Participant responses and interact with them directly.</i></p>
<p>Study State</p>	<p><input type="checkbox"/> Ensure that you change the Study State from Draft to Open so that Participants can access your Study space.</p> <p><i>Participant Access on your Site needs to be active in order for Participants to join an open Study.</i></p>

Activities

<p>Activity Start & Due Dates</p>	<p><input type="checkbox"/> Review All Activity Dates</p> <p><i>Ensure the Activity Start/Due dates reflect the Participant Access start/end dates in your Subscription.</i></p>
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Live Video Group Chats

<p>Time Zone</p>	<p><input type="checkbox"/> Review Time Zone of Live Activity</p> <p><i>If the time zone of the Study is updated after creating any Live Activities, ensure that these are reviewed as they will not update automatically and may need to be updated.</i></p>
<p>Live Video</p>	<p><input type="checkbox"/> Ensure that Enable live video is</p>

	<p>enabled</p> <p><i>If this feature is not enabled, the session will be a text-based group chat. This feature cannot be enabled once a session has already been started</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Review Live Video settings <ul style="list-style-type: none"> <input type="checkbox"/> Start with participants muted <input type="checkbox"/> Start with participant cameras disabled <input type="checkbox"/> Do not enable backroom audio and translator. If you will be having simultaneous translation(s) during a session, ensure you do not select this option. <p><i>We do recommend enabling the backroom audio channel, but have the Host mute the backroom once they join the meeting. This will allow for backroom observers to communicate freely amongst one another, without distracting the Host in the front room.</i></p>
<p>Limit who is invited to meet</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Review Activity visibility settings <p><i>By default, Live Video Group Chats will be visible to all Participants in a Study. If only a subset of Participants are meant to take part in a Live Video Group Chat, consider enabling 'Limit who is invited to meet' and limit the Activity to a specific Segment of Participants.</i></p>
<p>Limit visibility by clients</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Review Client visibility settings <p>If needed, Live Video Group Chats can be hidden entirely from Clients, or from select Clients when 'Limit visibility by clients' is enabled</p>
<p>Description</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Review Description field <p>Text entered into the 'Description' field will be displayed to Participants on the Meeting Page prior to entering a session. This field is a great space to let Participants know about performing a System Check, in addition to</p>

	best practices (e.g wearing headphones).
Notifications	<input type="checkbox"/> Review Notifications settings <ul style="list-style-type: none"> <input type="checkbox"/> Activity starts tomorrow (24 hours before start) <input type="checkbox"/> Activity starts soon (1 to 2 hours before start) <input type="checkbox"/> Activity started (actual start time) <p><i>The Notifications tab found in Activity setup will allow you to configure the notification settings for your Live Activity.</i></p>
Prepared Content	<input type="checkbox"/> Review any prepared content items

Live Video Interviews

Time Zone	<input type="checkbox"/> Review Time Zone of Live Activity <p><i>If the time zone of the Study is updated after creating any Live Activities, ensure that these are reviewed as they will not update automatically and may need to be updated.</i></p>
Meeting Hosts	<input type="checkbox"/> Review Meeting Hosts <p><i>If a Live Activity has multiple Hosts, the ability to schedule multiple meetings for one timeslot exists. If you want to prevent this, ensure that only one Host is available for each time slot within the Activity's calendar.</i></p>
Scheduling	<input type="checkbox"/> Will Participants be scheduling their interviews or will Admins schedule these sessions? <p><i>Live Video Interviews can be scheduled in two ways; Participants schedule their own meeting and Admins schedule all meetings. If Participants are allowed to schedule their own meeting, you will need to define a date that the Activity opens on so that Participants have access to the calendar to schedule.</i></p>
Calendar	<input type="checkbox"/> Review Meeting Duration

	<ul style="list-style-type: none"> <input type="checkbox"/> Review Meeting Buffer <input type="checkbox"/> Review Time Slots <input type="checkbox"/> Review Meeting Times <p><i>Once an interview has been scheduled, certain elements cannot be modified during Activity setup (e.g Meeting Duration and Buffer).</i></p>
Host Availability	<ul style="list-style-type: none"> <input type="checkbox"/> Review Host Availability settings <p><i>Hosts can choose to start available and remove undesirable times, or start unavailable and designate desirable meeting times. Participants will only be permitted to select meeting times where at least one Host is available.</i></p>
Include Pending Participants	<ul style="list-style-type: none"> <input type="checkbox"/> Review Include pending participants <p>This feature is enabled by default, and will include those that have been added to a Site, but have not yet joined the Study.</p>
Limit who can be scheduled to meet	<ul style="list-style-type: none"> <input type="checkbox"/> Review Activity visibility settings <p><i>Will this Activity be available to all Participants, or a subset group of Participants?</i></p>
Limit visibility by clients	<ul style="list-style-type: none"> <input type="checkbox"/> Review Client visibility settings <p><i>If needed, Live Video Interviews can be hidden entirely from Clients, or from select Clients when 'Limit visibility by clients' is enabled.</i></p>
Additional Limits when Participants schedule their interviews	<ul style="list-style-type: none"> <input type="checkbox"/> Review additional Limits settings <ul style="list-style-type: none"> <input type="checkbox"/> Limit number of Participants <input type="checkbox"/> Require at least X hours of notice for new meetings <p><i>When Participants are allowed to schedule their own meetings, there are some additional settings within Activity setup. You can define a limit of how many Participants can take part in any interviews. Once this limit is reached,</i></p>

	<i>Participants will be unable to book additional meetings. You can also define a specific amount of time required to book meetings.</i>
Prepared Content	<input type="checkbox"/> Review any prepared content items