AV OPERATIONS STANDARD OPERATING PROCEDURES

Portfolio excerpts from my step-by-step manual for all technical procedures of AV Engineering Operations

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Preface

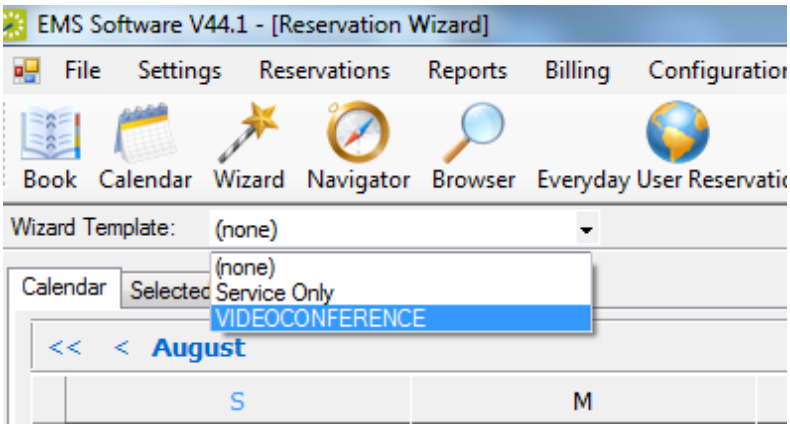
I wrote the AV Engineering Operations manual to address two needs: 1) training and 2) a point of reference material. Concerning the former, said manual provides step-by-step instructions on most facets of AV Engineering Operations, thereby streamlining training for all new hires. Secondly, this manual serves as a point of reference material–a refresher of sorts, as some activities aren't conducted on a day-to-day basis.

EMS Scheduling

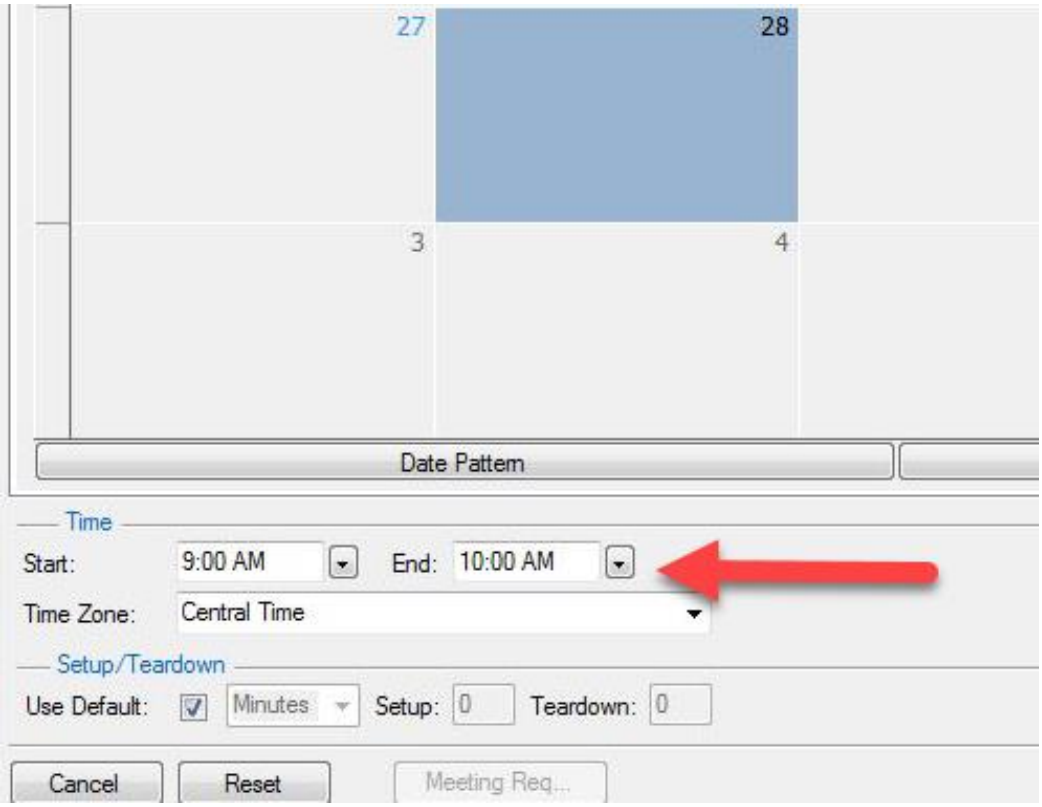
EMS is scheduling software used to reserve meeting rooms and videoconferencing resources. EMS automatically assigns a unique Conference ID to each reservation, which identifies the booking and may also be used when scheduling a videoconference call on the RMX Bridge.

Creating a New Reservation

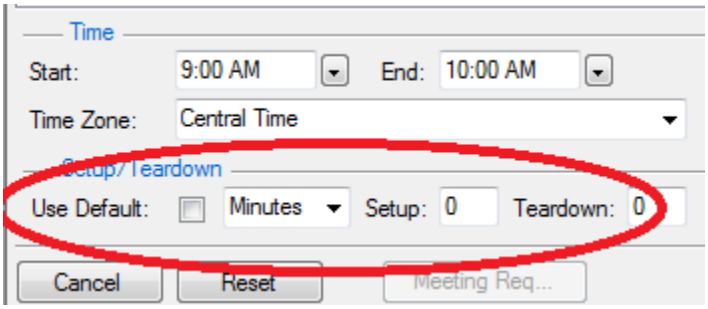
Open EMS and select VIDEOCONFERENCE from the Wizard Template menu.



Select the desired date or dates on the calendar, then specify the reservation's start and end times in the Time Slot fields.



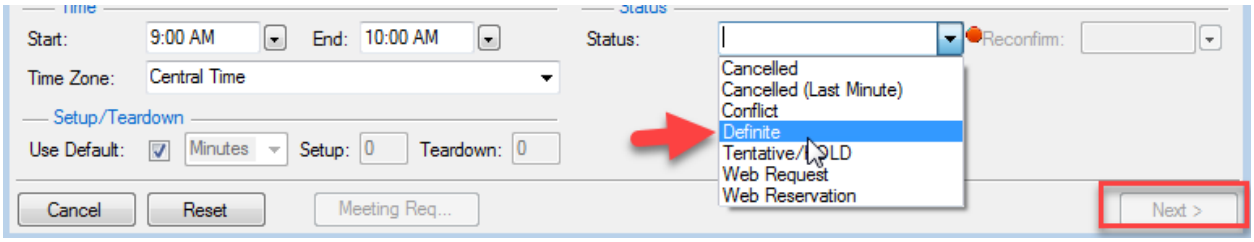
By default, EMS reserves 30 minutes before and after each booking. This provides additional time for event preparation and accommodates events that extend beyond their scheduled end times.



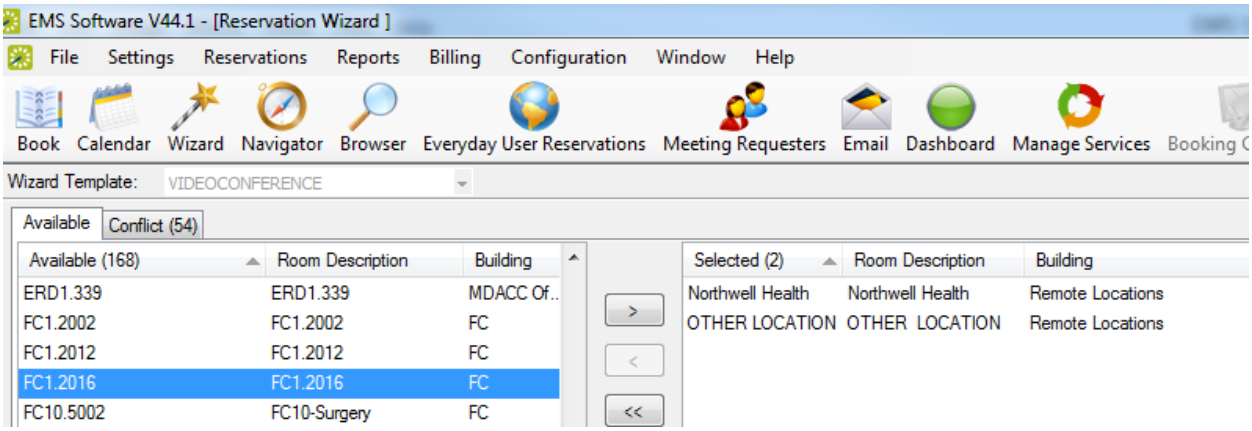
To customize these time allowances:

1. Uncheck the **Use Default** box under Setup/Teardown.
2. Enter the desired durations in the **Setup** and **Teardown** fields.

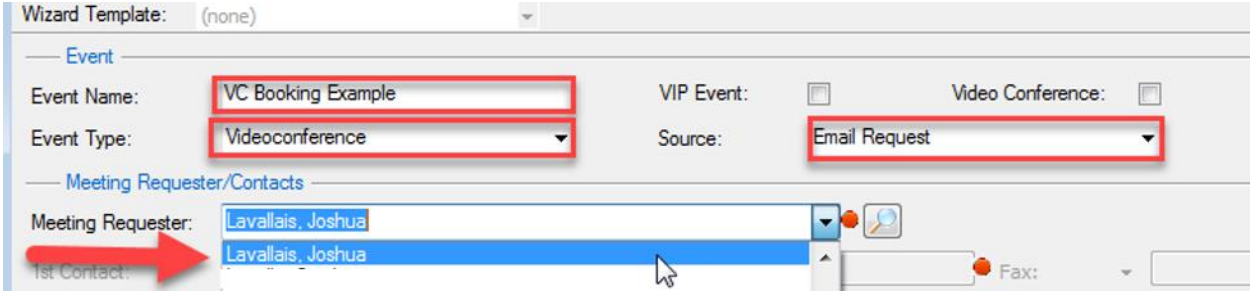
Select DEFINITE for status, then click Next.



Select rooms & locations by double-clicking the room resource. In our example, FC1.2016 is our chosen venue.

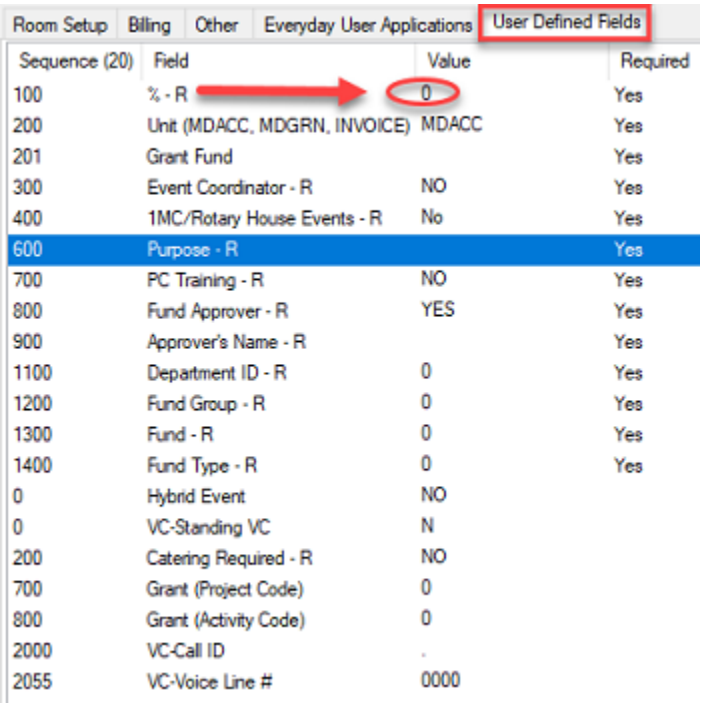


Once you've selected a venue, manually enter an Event Name in the event name field below. Using the dropdown arrows, select event type, source type, and meeting requester type in their respective fields. In our example, the event type is *videoconference*, source type is *email*, and meeting requestor is *Joshua Lavallais*. **NOTE:** When searching for a meeting requestor, type the last name of the requestor in the Meeting Requestor field to auto-populate the full name of the client.

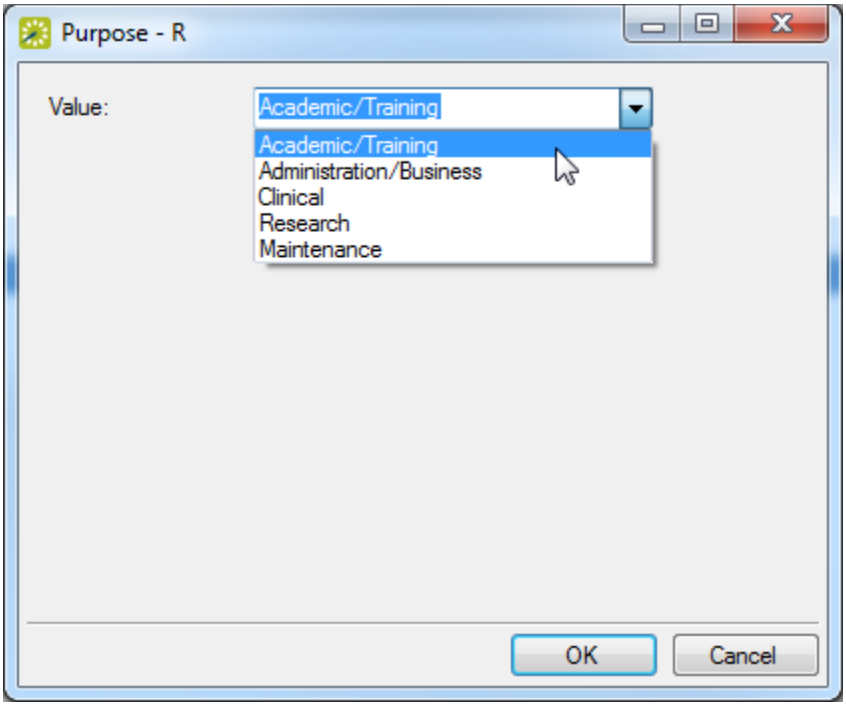


Click on the User Defined Fields tab and double-click on the following highlighted fields to enter the following values:

100 r %-R



In the **Purpose Value** drop-down menu, select the meeting type – in our example, we chose Academic/Training.



Continue double-clicking to enter pertinent values, as listed below:

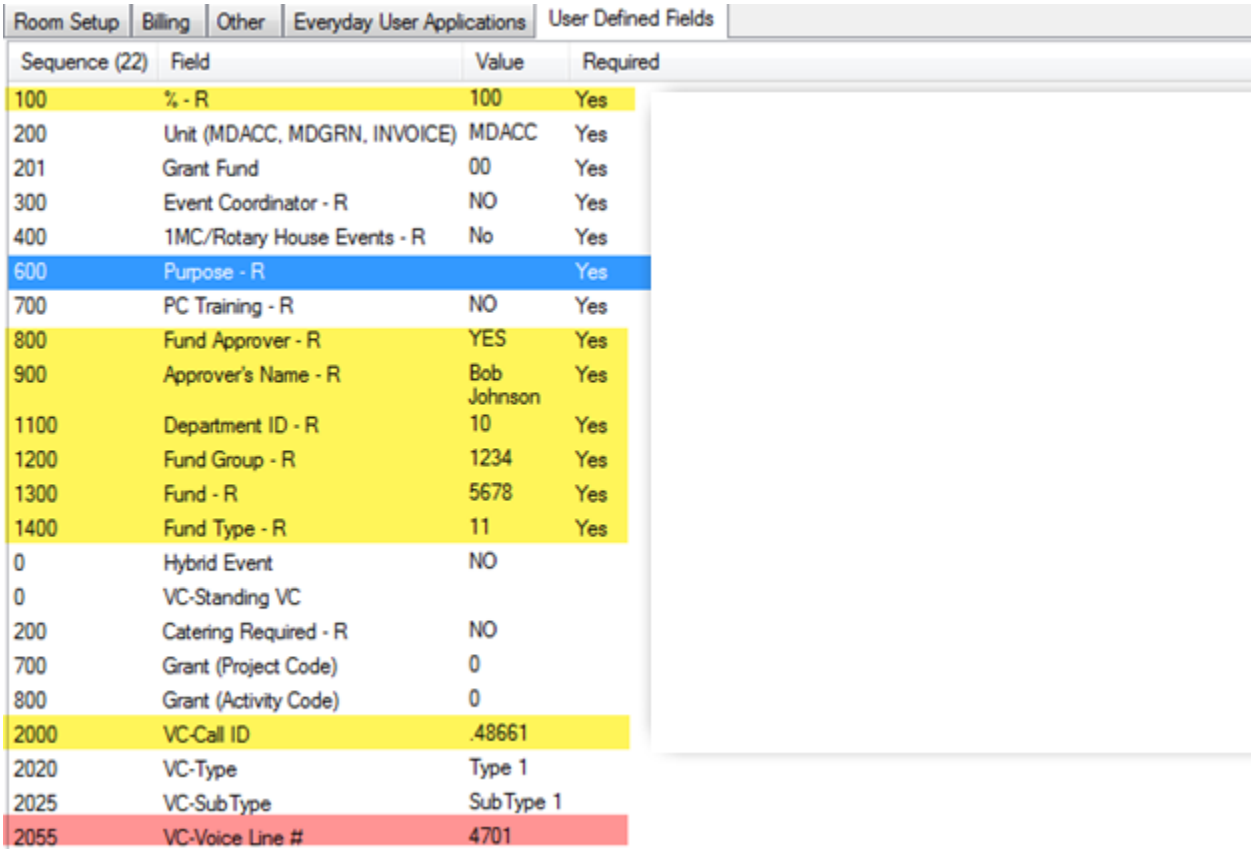
“YES” for FUND APPROVER

Fund Approver’s name in APPROVER’S NAME

Department ID, Fund Group, Fund, and Fund Type are provided by the requester. These numbers make up the company center number.

Reservation number. *Please note that some reservations have standalone numbers that differ from their EMS reservation #. For example, MDA Physician Network Video Conferences use 6300.

If the RMX bridge telephone number will be used, enter it in VC-Voice Line#. Ex: 4701, as seen below.



Room Setup | Billing | Other | Everyday User Applications | User Defined Fields

Sequence (22)	Field	Value	Required
100	% - R	100	Yes
200	Unit (MDACC, MDGRN, INVOICE)	MDACC	Yes
201	Grant Fund	00	Yes
300	Event Coordinator - R	NO	Yes
400	1MC/Rotary House Events - R	No	Yes
600	Purpose - R		Yes
700	PC Training - R	NO	Yes
800	Fund Approver - R	YES	Yes
900	Approver's Name - R	Bob Johnson	Yes
1100	Department ID - R	10	Yes
1200	Fund Group - R	1234	Yes
1300	Fund - R	5678	Yes
1400	Fund Type - R	11	Yes
0	Hybrid Event	NO	
0	VC-Standing VC		
200	Catering Required - R	NO	
700	Grant (Project Code)	0	
800	Grant (Activity Code)	0	
2000	VC-Call ID	.48661	
2020	VC-Type	Type 1	
2025	VC-SubType	SubType 1	
2055	VC-Voice Line #	4701	

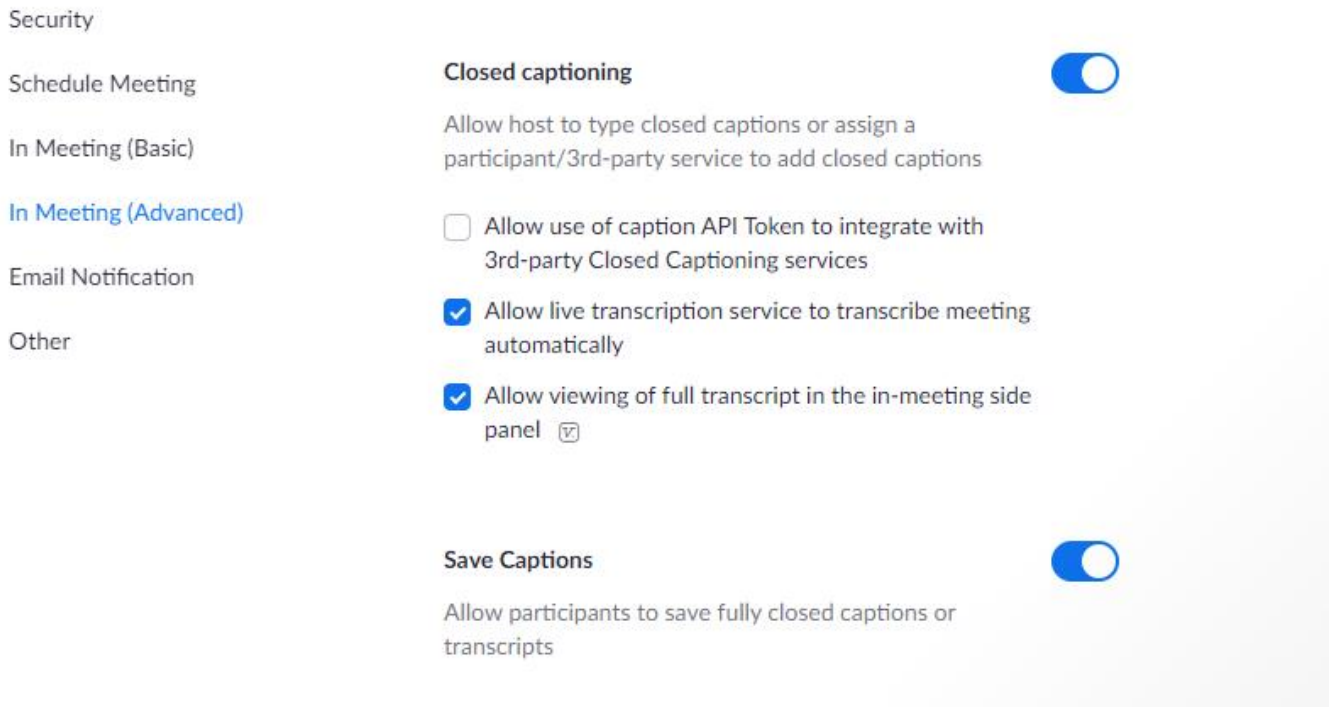
How to enable ZOOM Closed Captioning

Log in to ZOOM and go to Settings.

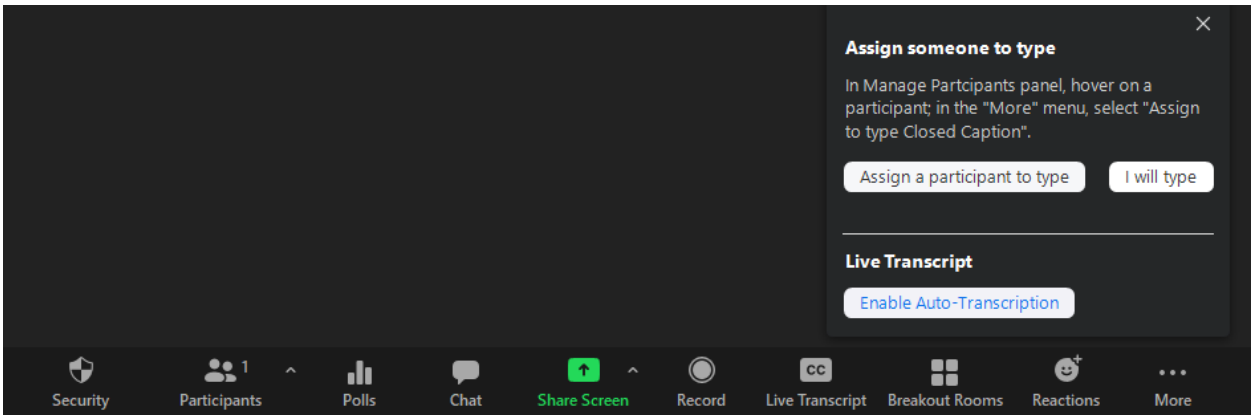
Enable the following:

1. Closed Captioning.
2. Allow Live Transcription service to transcribe the meeting.
3. Allow viewing of full transcript in the in-meeting side panel.
4. Save Captions.

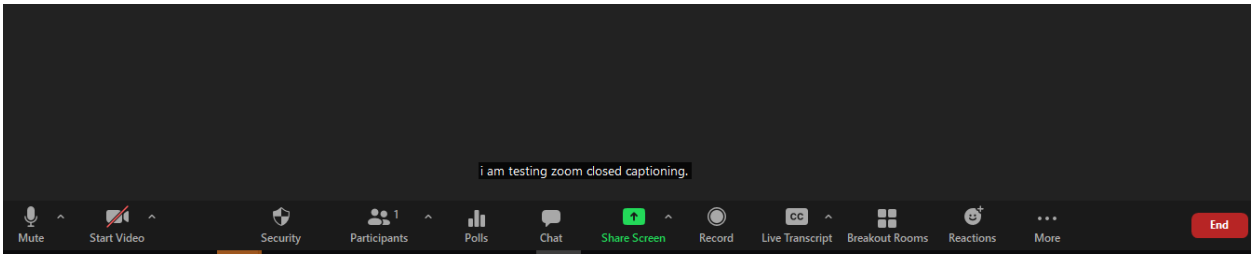
NOTE: Electing to enable Save Captions produces a transcribed text document to the host once the meeting is done.



Click the CC Live Transcript button, then select Enable Auto-Transcription.



ZOOM Closed Caption will transcribe each spoken word near the bottom of the screen (as seen below).



Following the conclusion of the meeting, a file of the transcribed text will populate in the host's downloads folder.

Event Operations Troubleshooting & Ticketing

The maintenance and upkeep of all conference room equipment are vital to our team's success. Equipment that functions properly alleviates burdens and ultimately grief from the shoulders of both our clients, and other team members who operate the rooms. To maintain optimal performance of all conference room AV equipment, all equipment maintenance-related issues must be documented with a ServiceNow ticket for two reasons:

1) If a conference room issue was resolved via successful troubleshooting measures, still put in a ticket. Despite having resolved the problem, a ticket creates a digital paper trail, thereby documenting an incident that could be recurring or indicative of a more serious underlying issue in the conference room.
2) Certainly – if troubleshooting measures did not resolve an issue, create a ServiceNow ticket to alert AV Engineering.

What constitutes creating a ticket? Some examples are, but are not limited to the following:

5. An inoperable tabletop microphone.
6. Projector bulb replacement.
7. Switcher malfunction (unable to switch sources to the projector or displays).
8. Conference room camera issue(s).

Conversely, do not create tickets for issues such as:

2) Replacing batteries in the wireless microphones.
3) PC image not visible on projector screen due to the Extended view preference from previous user.
4) Disruptive noise stemming from two microphones on the same frequency.
5) A broken easel.

Furthermore, any issue that is related to a disruption in the mechanical operation of conference room equipment (issues stemming from equipment failure), even if troubleshot successfully, must be documented with a ServiceNow ticket.

PART 1: THE TROUBLESHOOTING PROCESS

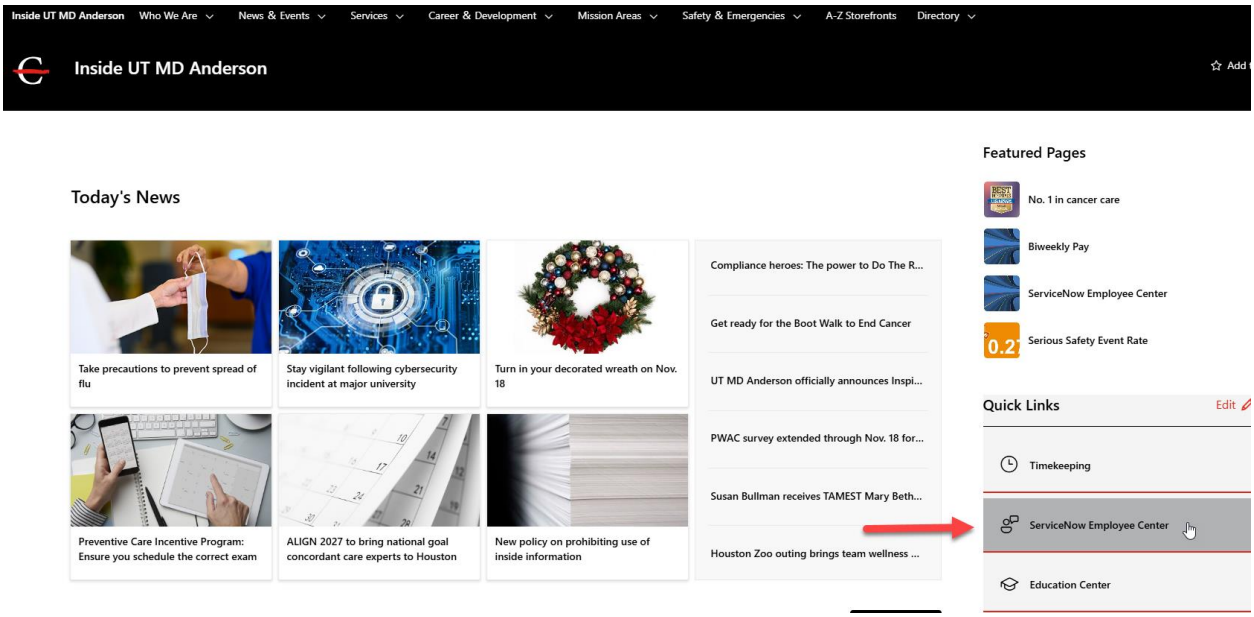
Each event requires a minimum of 30 minutes before the scheduled start time to test equipment. The 30-minute window provides a cushion in the event of technical failure related to conference room equipment. Enter the troubleshooting phase – the assigned technician is required to spend **no more than 15 minutes** troubleshooting the issue.

More on the 15-minute rule – why not call AV Engineering directly upon discovering an issue? There are several reasons. First, while troubleshooting cannot solve all conference room issues, it is a useful frontline technique to potentially resolve a number of problems. Second, knowledge of troubleshooting – particularly the signal flow method – equips each technician with in-depth knowledge of conference room equipment. This knowledge provides a deeper understanding of the conference rooms' capabilities – something that can aid the technician when disclosing the various capabilities of each conference room when speaking to clients. Lastly, with so many conference rooms and limited AV Engineering staff, an attempt to troubleshoot an issue helps to efficiently manage limited resources, thus allowing the engineers to focus on other conference rooms and engineering projects.

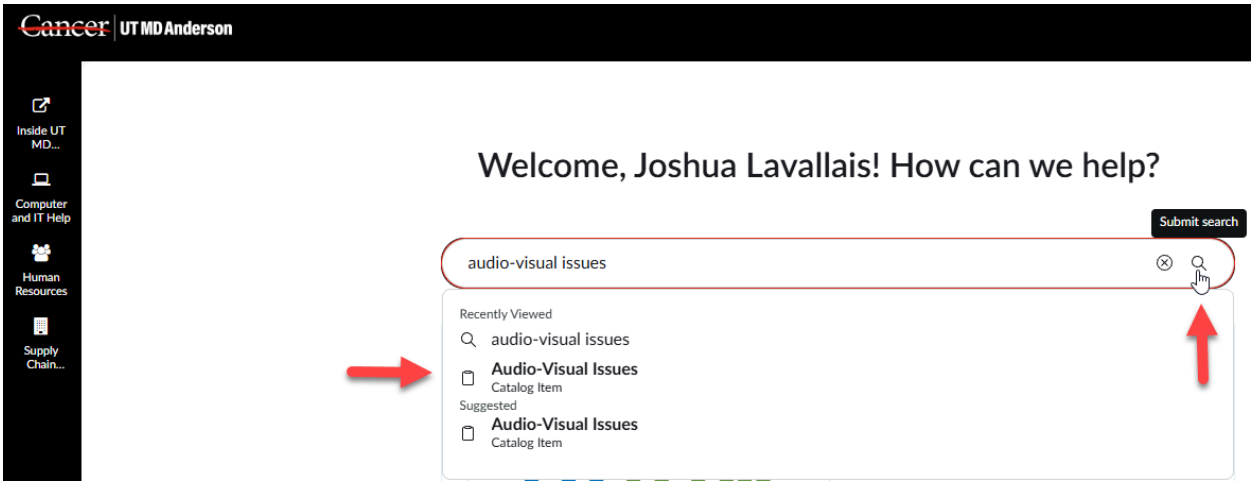
If the technician is successful in troubleshooting the issue before the 15-minute deadline, still, create a ticket (see ticketing steps on page 3). Equally, if the technician is unable to resolve the issue, they are to notify their supervisor immediately and then create a ticket as soon as time permits.

PART 2: HOW TO CREATE A SERVICENOW TICKET

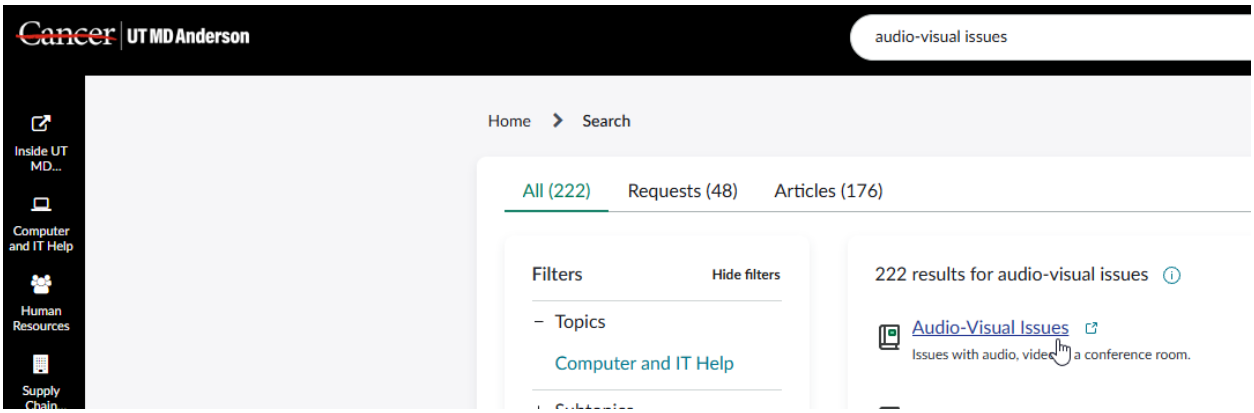
First, navigate to the inside MD Anderson homepage – if need be, scroll down to view and click on ServiceNow Employee Center.



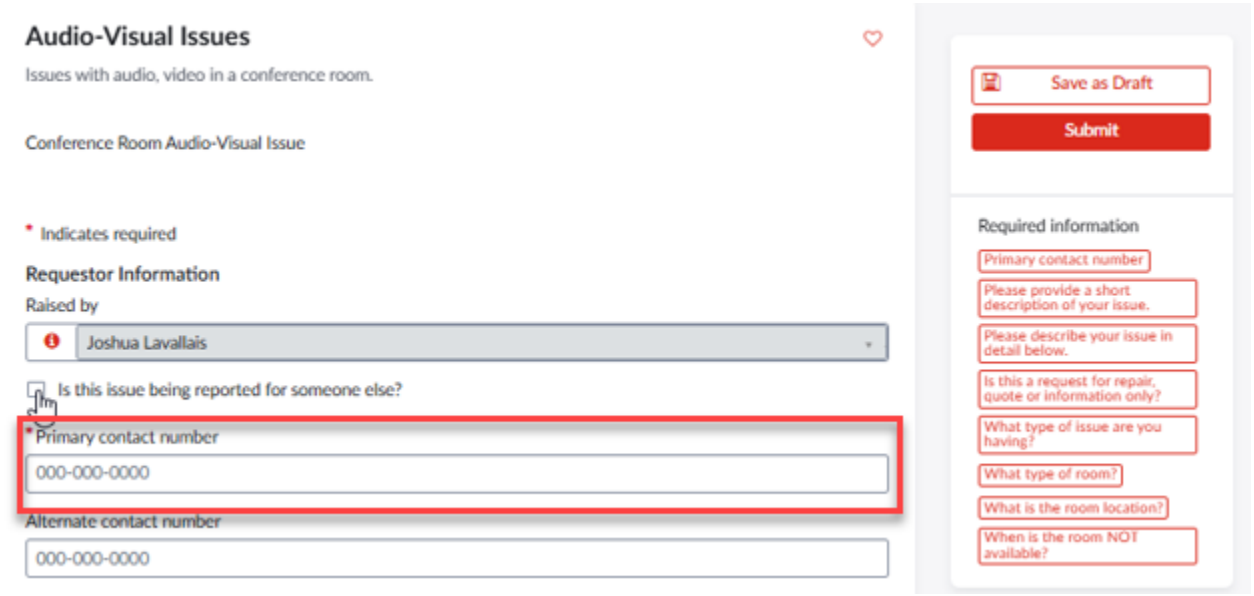
Next, type audio-visual issues in the search field, then click the magnifying glass icon to submit the search. Or, once the IntelliSense populates Audio-Visual Issues in the returned results, click the returned catalog item of Audio-Visual Issues.



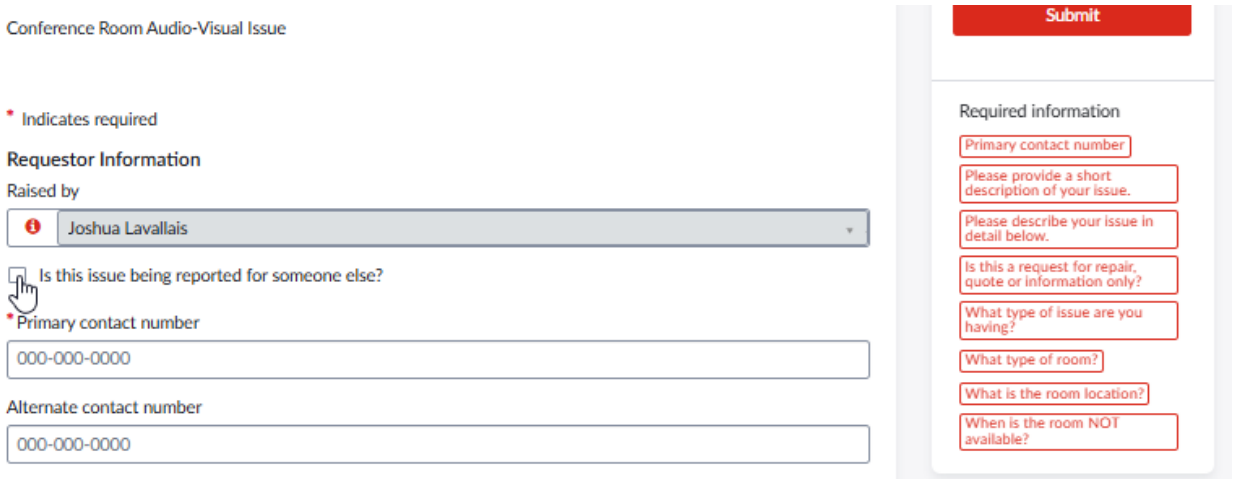
Once you select Audio-Visual Issues by clicking the magnifying glass icon or clicking the returned catalog item, Audio-Visual Issues, click Audio-Visual Issues again as seen below.



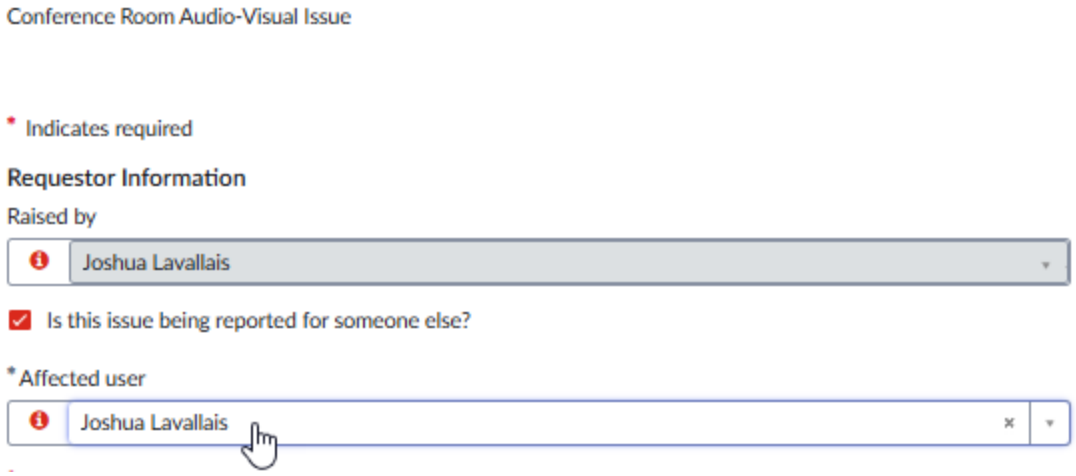
You will arrive at the ticket form – this is where you will input all information related to the conference room issue. **Note**: Some fields require data input, as indicated by the corresponding red asterisk. Also, if there are two or more separate conference room issues, create a ticket for each issue. By default, your name will be seen in the Raised By field. If you are reporting the issue, leave your name in the Raised by field and enter your best contact number in the Primary contact number field.



However, if you are submitting a ticket on behalf of someone else, click the checkbox, at which point you must enter the name of that person in the Affected User field, or search for their name.



To conduct a search, click on the name that is in the Affected User field, as seen below.



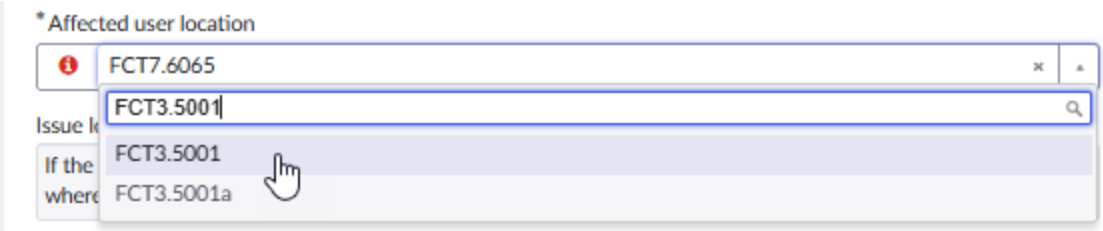
Then search for the user's name. Once found, click the user's name.



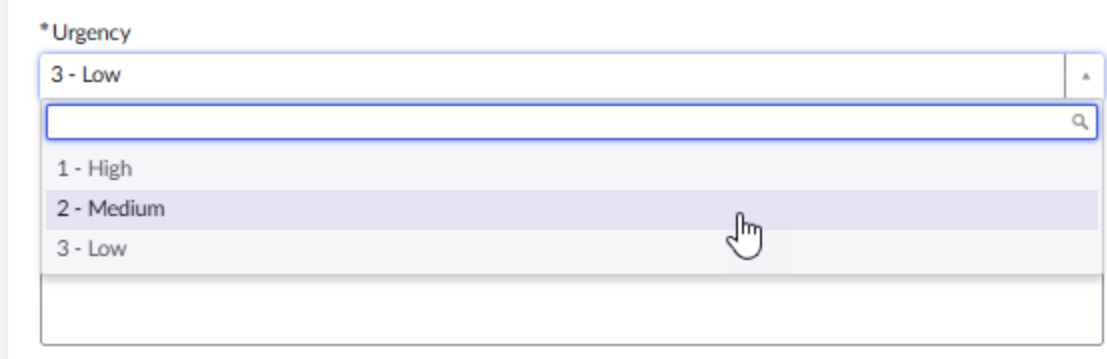
Next, enter the room number for the conference room in question. By default, your assigned office location room number will be seen in the Affected User location field. To change the room number, click the "x" on the far-right side of the Affected User Location field, or click anywhere on the Affected user field to type in the conference room number, or search for it.



Once found, click the room number listing.



Next, select the dropdown menu to select the urgency of the matter.



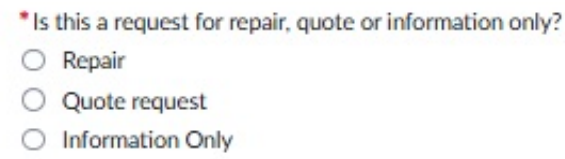
Next, in the text field titled *Please provide a short description of your issue*, provide a short description for the issue(s). Preferably, use the conference room number as a prefix. For example: FCT3.5001 Auto Camera Switching is not working.



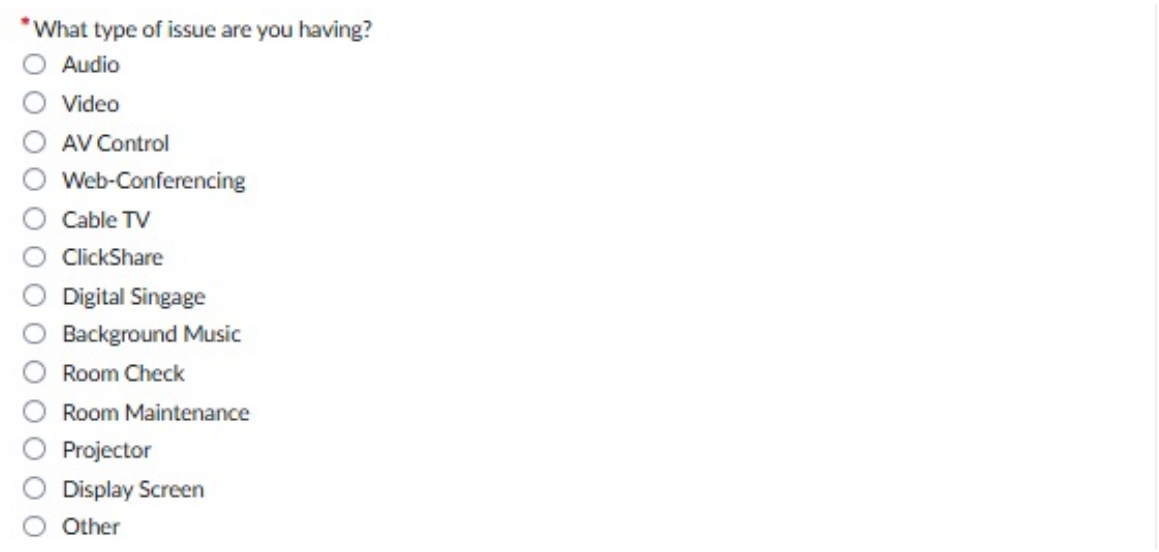
In the following box titled *Please describe your issue in detail below,* write a brief synopsis of the conference room issue, including what steps were taken to troubleshoot the problem. Your input will summarize the issue for AV Engineering while disclosing steps already taken to troubleshoot, thereby allowing the AV Engineering team to employ other troubleshooting measures.



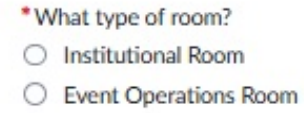
Next, select the bubble for repair.



Then, select a bubble that corresponds to the issue. For example, if the issue is Auto Camera Switching, the closest matches are **AV Control** or **Other**.



Once you have selected the corresponding issue, identify if the conference room is an institutional room or Event Operations room.



Next, type the conference room number in the *What is the room location?* text field.



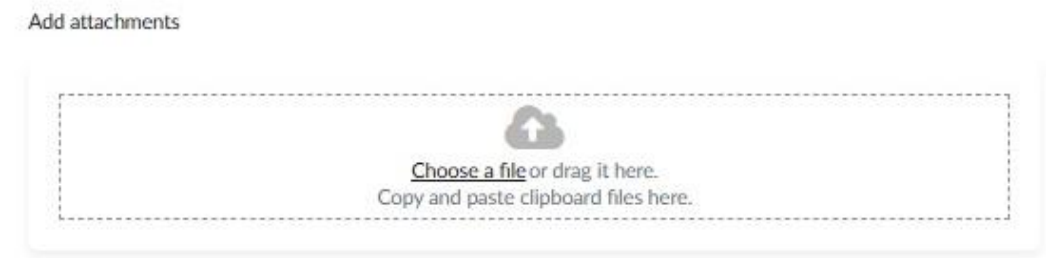
Indicate when the room is not available. For those without access to the EMS Scheduling platform, your supervisor or a member of the Event Services Scheduling team can identify when the room is available – this is important, as it communicates to AV Engineering when the room is available for maintenance.



Now, list any additional information that might be pertinent to the AV Engineering team – information that could help during their investigation to fix the issue.



Also, if pictures were taken, attach them using the Choose a file or drag it here options, as seen below.



Lastly, click the submit button, located to the right side of your screen, to submit your ticket. Immediately, the ticket will be routed to the queue of AV Engineering, at which point it will be assigned to a member of AV Engineering for further review and action.

