Scheduling a Videoconference

This document describes the process for requesting, scheduling and tracking a videoconference. The process begins when a user requests a videoconference and ends after the scheduled time of the event has passed and a follow-up email has been sent.

Definitions:

"Media Coordinator" is a Centre for Teaching and Learning (CTL) staff member who responds to telephone inquiries, monitors e-mail and is responsible for the initial booking in the database. S/he is also listed as the contact for events booked by external clients.

“Level 1 support” is a staff technician who has been trained on initiating videoconference calls and performs simple on-site videoconference troubleshooting.

“Level 2 support” is a staff technician who has more experience in videoconference testing and troubleshooting.

Videoconference database

Online, "public view" access to the videoconference schedule will identify when videoconference resources are available for a call. A general calendar of available/ unavailable time would be visible to all users. Network test times, scheduled test call times, and scheduled calls would appear as unavailable times.

UWinID login access will provide additional information (name, email or ext.) about other users who have booked calls on the system. In the case of a booking conflict, this information would allow a user to contact other university clients to verify if their call is still scheduled. For all changes to bookings, the regular process (phone call, email or web form) would reflect any modifications and to re-schedule testing. A notice will be sent to the client stating that changes will require re-testing and approval. Rescheduling changes should be requested with the normal notice period as indicated below. In the case where an event should remain private or where an external party has arranged for the booking, the Media Coordinator’s contact info will be listed. Details of external bookings are visible only to the Media Coordinator.
1. **Initiating the request**

To schedule a videoconference, the user must book a room and include the far-side contact information at least 72 hours (3 business days) in advance to allow for tests and preparation beforehand. With less notice, the event may proceed on a best effort basis.

The user chooses the method of request: complete an online form, email a request to the CTL Media Coordinator, or call the CTL Media Coordinator.

Regardless of the method, the user will be required to provide information about the "far-side" (the videoconference site to which we will connect). The responsibility for gathering this information lies with the user, although the CTL media coordinator may provide some support (e.g. directing them to online directories of call sites or providing information on possible sites in the vicinity of the requester).

The user receives immediate feedback about the receipt of the request: if they fill in the online form, the form will confirm that the information has been received; if by email, the request will go to videoconf@uwindsor.ca; if they call CTL, the Media Coordinator confirms the request.

Once entered into the system, a feedback message is emailed to the user to confirm. This email will contain a service contract outlining what is expected of the client, what the University intends to provide, a statement of liability and any potential charges.

2. **Gathering additional site info**

The basic information about the far-side the user provides may not be enough to complete a call. Should additional information be required from a technician at the far-side, an email form will be sent requesting the required details about their site.

3. **Site approval and testing**

Once the far-side information is gathered and the conference is scheduled, our technicians must approve the far-side site information and conduct tests to ensure that the videoconference is feasible. Testing is to be completed at least 1 business day before the videoconference. In the case where the far-side cannot perform a pre-test before the day of the conference, a note will be made in the database and sent to the client. The conference may proceed on a best effort basis and charges, if any, will still apply regardless of the outcome.

The results of the tests are entered into the booking system and the user receives a message stating the outcome of the tests. If tests are successful, the user is notified that the videoconference will proceed; if not, the videoconference may be cancelled or rescheduled. The user should be informed that alternatives for a successful call may be explored if desired and there may be charges associated with them. The details of any alternatives need not be specified; simply a notification that if a user wishes to explore alternatives, they should contact the Media Coordinator. Information on alternatives may be entered by the technician that performed initial tests as a part of their comments.
4. **During the videoconference call**

The user may decide at any time to cancel an event. Reasons for cancelling may include problems with the technology or scheduling conflicts with other participants. The user may still incur service charges due to charges by other service providers.

If the videoconference call connects successfully and the event proceeds to the satisfaction of the user, the call is considered a success. If there are any technical problems, the user should contact the technician who placed the call, generally located in the same building.

4 a) **Issue Escalation**

All technical problems shall be reported to the technician who placed the call for initial problem resolution. The issue is documented in the system by the Level 1 support technician. The client is notified by email at this time.

If the technician resolves the problem, it is marked closed in the system and the call continues as planned. If the problem cannot be resolved, the user is asked if (1) they wish the issue to be escalated to the second level, noting that if outside business hours, this will take longer than otherwise and overtime charges may apply, or (2) if they wish to cancel the call. If the user chooses to continue, a Level 2 technician is contacted. The escalation and the outcome of the investigation are documented in the system.

If the second technician cannot solve the problem and it is determined that the issue is outside the University’s network, then it may be escalated to CSCI. A technician at CSCI will be contacted to investigate network issues outside of our LAN and local-area components. The escalation, investigation and outcome are documented in the system.

Following this process, the videoconference call is either "recovered", "failed" or "cancelled". The call is "recovered" if the problems are corrected and the call proceeds to completion; "failed" if the technical problems could not be resolved; or "cancelled" if the client opted to cancel the call prior to the outcome of the escalation process.

5. **Post-conference**

Within 2 business days of the videoconference, the user will receive a "videoconference follow-up" by email or telephone. This message will confirm the outcome of the videoconference and possibly information about the escalation/troubleshooting undertaken. Confirmation of post-conference follow-up will be documented in the system. This will include a request to complete a short customer-satisfaction survey, with a comment section if a user wishes to provide additional comments.

This concludes the videoconference process.

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