



Halo[®]

User Guide

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Polycom, Inc.
6001 America Center Drive
San Jose CA 95002
USA

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1 Overview

The Halo environment

The POLYCOM Halo Collaboration System facilitates “face-to-face” meetings between people located at different sites. The design and placement of the Halo equipment contribute to the impression that all participants are present in the same location.

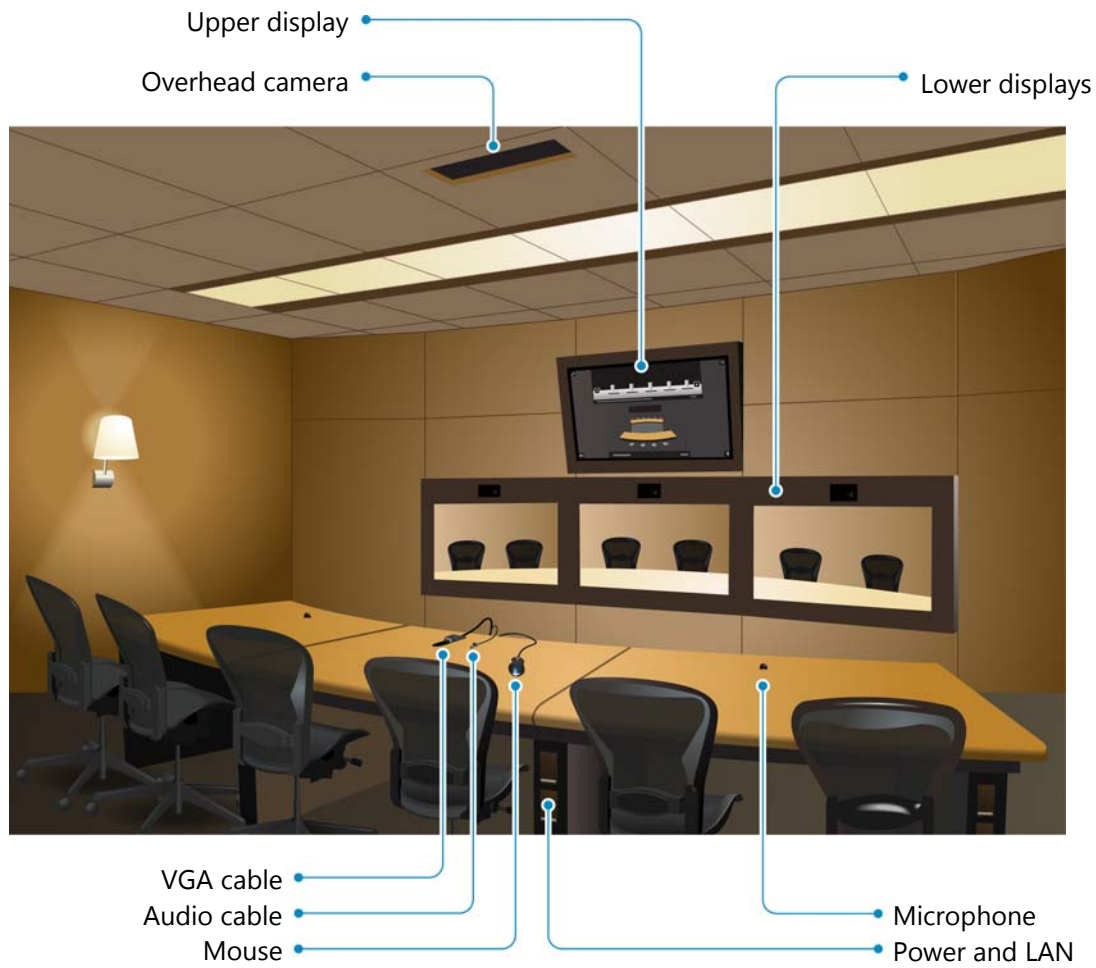
Although different Halo locations may have different seating capacities, each location contains a similar set of fixtures:

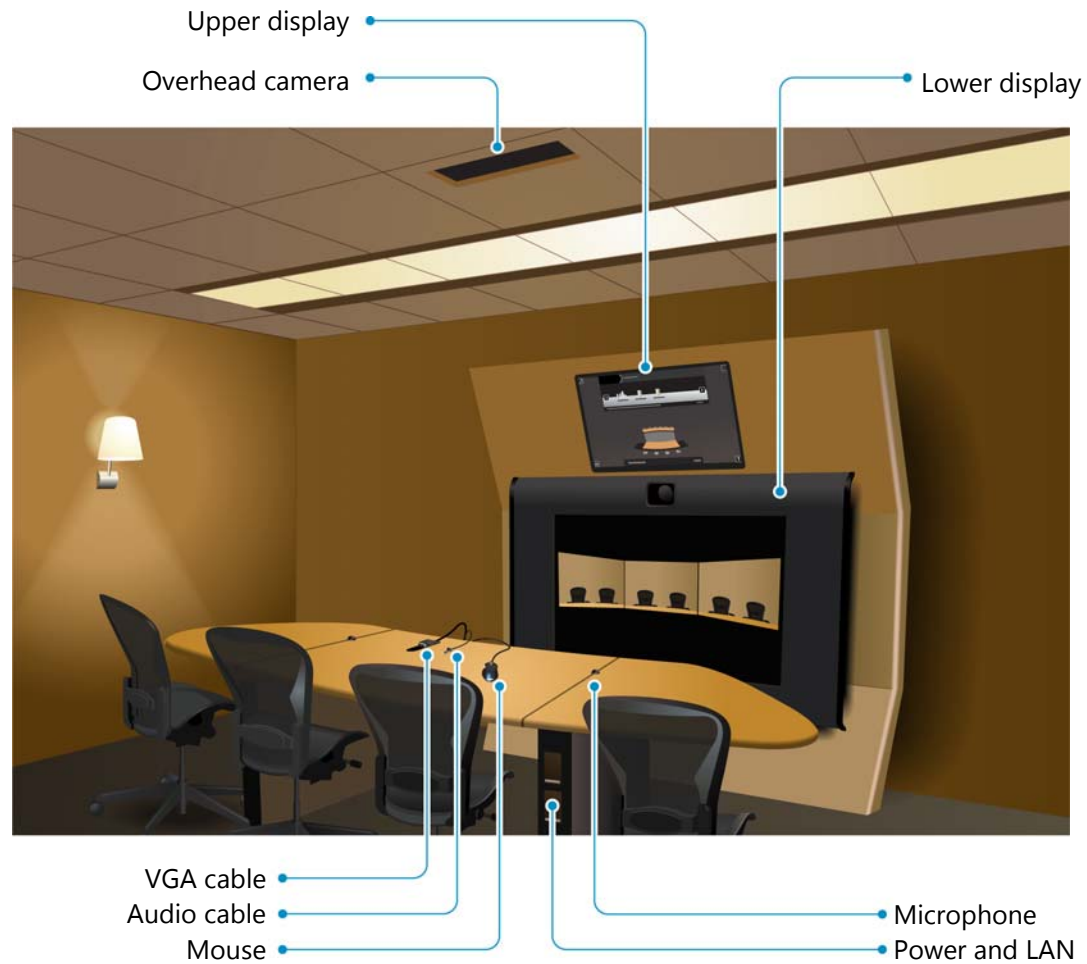
Conference table with six, four, or two seats

- Lower display or displays for viewing participants in up to three other Halo locations
- Upper display, or collaboration display, for setting up meetings and sharing information
- Mouse for operating the upper display
- VGA cable for connecting video output from an optional laptop computer—in certain locations, the cable also has an audio plug for connecting audio output
- In certain locations, an overhead camera for showing physical items during a meeting
- In certain locations, video-conference equipment and a remote control or other control device for linking a video conference to a Halo meeting
- Other equipment, such as microphones, speakers, and cameras, needed to conduct a meeting
- User’s guide containing operating instructions

The next two illustrations show examples of a fully furnished six-seat Halo studio and a fully furnished four-seat Halo meeting center.

NOTE: A two-seat or four-seat meeting center has only one lower display, whereas a six-seat studio has three lower displays. However, both locations can see the same views of participants in other locations.





CAUTION: Do not clean or repair any of the displays or other Halo furnishings. Improper cleaning or repair could cause damage. Special cleaners and procedures are required for most items. Please notify the local Halo administrator about any items needing maintenance.

How a meeting happens

It's easy to start a Halo meeting: A person in one Halo location selects up to three other locations and invites them to join a meeting.

The large lower display or displays show the participants in the remote locations, and optimized communication technology provides high-quality video and audio. So you can clearly see and hear each other—as though you were seated in the same location.

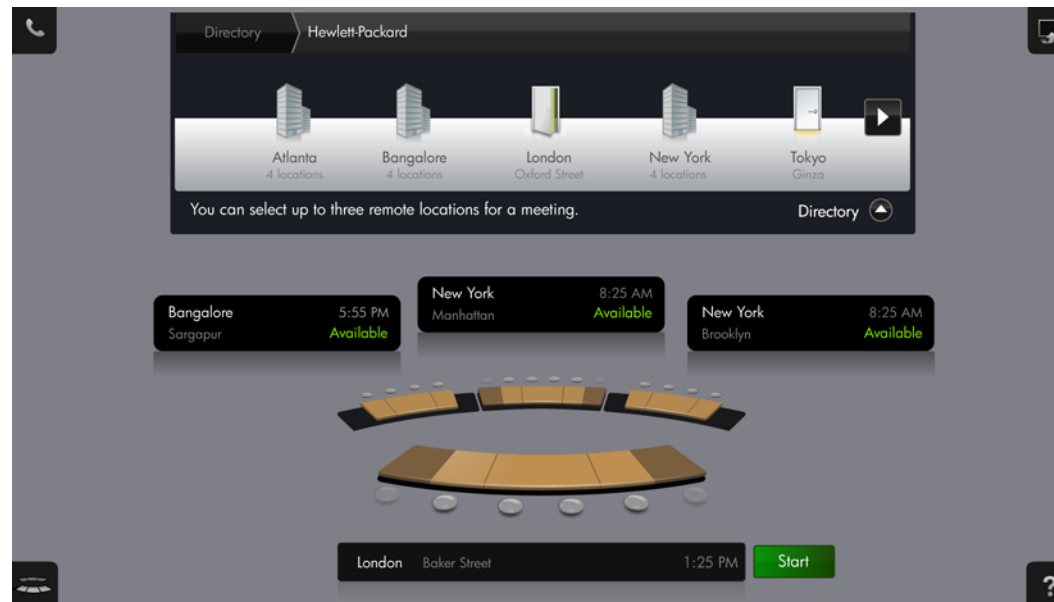


NOTE: Previous versions of Halo were similar to this version in many ways, but some differences exist. For example, with this new version, a meeting may include locations with different seating capacities, from a six-seat studio to a two-seat meeting center. In addition, a meeting may include all the participants of a simultaneous video conference.

What the upper display does

The first purpose of the upper display is to show the Halo setup screen, which is unique for each location. This screen helps you conduct meetings by providing these important tools:

- List of all available Halo sites and locations
- Diagram showing locations participating in the current meeting
- Phone icon ☎ for connecting a telephone participant
- Share icon 🖨 for showing a picture or information to other locations
- Manage icon 📅 for changing the meeting setup
- Help icon ? for getting assistance quickly



The second purpose of the upper display is to show a picture or information you want to share with participants in all locations. This allows everyone to view and discuss the shared content.

How problems get fixed quickly

If any problems or questions arise, you have instant access to the Halo concierge. With a simple mouse action or phone call, you're connected to the concierge for a quick solution to your problem. The concierge is an expert on the Halo system and can operate your Halo system remotely or answer your questions.

For details, see "Getting Assistance" on page 30.

2 Starting and Ending Meetings

People at two, three, or four locations can participate in a meeting. A simple face-to-face discussion requires only that you select the locations for the meeting and start the meeting.

If the information on the upper display is shown in an incorrect language, see “Changing the on-screen language” on page 28.

Starting a meeting

A meeting can be started at any Halo location, and all Halo locations are equal participants in the meeting. If you want a meeting to include participants from a video conference, see “Including video-conference participants” on page 13.

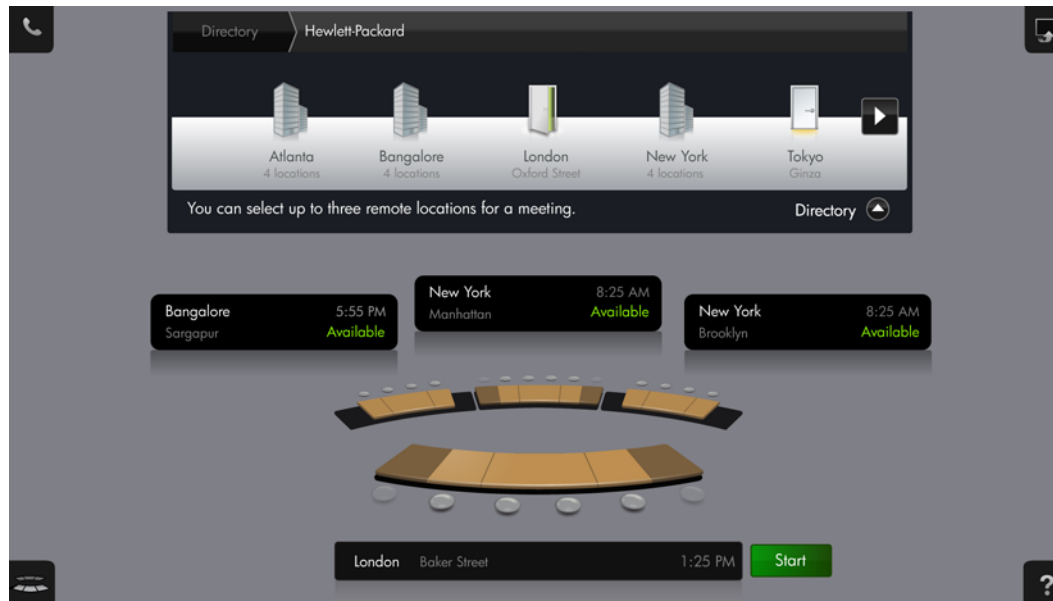


TIP: You use the Halo mouse to control the upper display. If you have a wireless mouse, it is normally stored in the holder on the table. The holder recharges the battery in the mouse.

- *If someone in another location will start the meeting*, just wait for the invitation to appear on your upper display, then click Yes using the mouse. *Stop here.*
- *If you want to start the meeting*, continue with the steps below.



TIP: If the Halo screensaver is shown in the upper display, move the mouse on the table—this normally shows the main setup screen (see the next page). If a different screen is shown, point to the  Manage icon at the bottom-left corner, then click .



1. In the directory of Halo sites at the top of the setup screen, click the desired location . This adds the location to your meeting diagram.

You may have to click ◀ or ▶ to find a location in a long list.

Some locations may be listed under their city names—click the city name  to see locations at that city.



City



Location



TIP: If the directory of Halo sites is hidden at the top of the setup screen, click Directory ▼.

2. If you want to include one or two additional locations in the meeting, repeat the previous step for each location. As many as four locations may participate in a meeting.
3. In the meeting diagram on the screen, click Start to invite the locations to the meeting. The meeting starts when a Halo location accepts the meeting invitation.

Important: If any of the invited locations include an external company, you will receive a warning and be asked to confirm the company and the meeting location.

If your meeting diagram shows a meeting between only two Halo locations, the people view in the lower display or displays shows all seats of the other location. If your diagram shows a meeting with three or four locations, each picture in your people view shows a different location, and all seats of each Halo location may not be visible—see “Changing the view in people displays” on page 23.



NOTE: For a location with only one lower display, the lower display automatically shows one, two, or three people pictures. The number of pictures depends on the number of remote locations and their seating capacities.

More about starting meetings:

- If you include a Halo location that appears in the directory as a closed door , that location is marked as Busy or Unavailable and cannot join your meeting at this time. In the meeting diagram, click Invite after the location status changes to Available (to send another invitation) or point to the location and click Remove (to free the space in your meeting). If you need to contact a location that is busy or unavailable, see “Getting Assistance” on page 30.
- If a location rejects an invitation to a meeting, the location is marked as Declined. In the meeting diagram, click Invite (to send another invitation) or point to the location and click Remove (to free the space in your meeting).
- If nobody in a location responds to an invitation within about half a minute or so, the system automatically sends a response. The invitation is automatically accepted or rejected, depending on your company's preferences.
- For a meeting with three or four locations, if the order of locations in your people view is important, select locations in this order: first select the location for the middle position in the meeting diagram, next the location for the left position, and last the location for the right position. Your people view matches the order in

the meeting diagram. However, the order of locations is optimized individually for each location, so other locations always see locations in different orders.

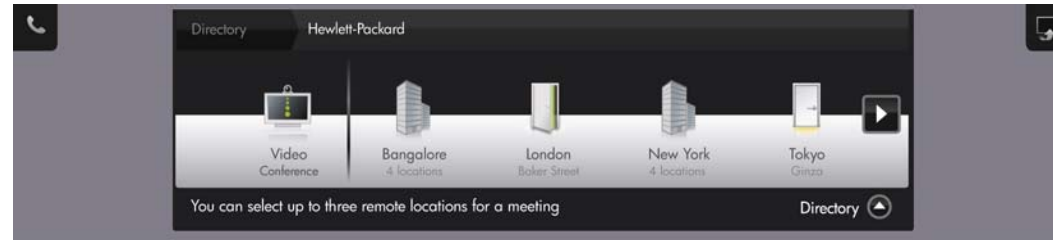
- If you want to meeting with a location at a different company, click the first directory level at the top of the directory. This level shows all companies (🏢) available to your location. If the company you want is not listed, see “Getting Assistance” on page 30.

At the start of a meeting and whenever necessary during a meeting, the audio system automatically corrects for acoustic variations in the locations. This correction takes less than a minute, and occasionally you may hear a temporary echo during the correction process.

To end the meeting, see “Ending a meeting” on page 17. To see options for conducting your meeting, see “Conducting Meetings” on page 18.

Including video-conference participants

If your Halo location has video-conference equipment installed, your directory of sites at the top of your setup screen includes a video-conference entry (🖥️) at the left end of the listing. Your Halo location can be a host, and your meeting can include all the people participating in a simultaneous video conference—along with as many as three Halo locations. During the meeting, you must coordinate between Halo participants and video-conference participants.



1. Include the video-conference system in your meeting setup:

When starting your meeting, click the video-conference entry (🖥️) as one of the selected locations, or

After the meeting starts, add the video-conference entry (🖥️) to your meeting—see “Adding more locations to a meeting” on page 26.

NOTE: Only one video conference can be included in a meeting, and it can be added only from the *host* Halo location, where the equipment is installed. The video conference can have as many participants as the equipment supports.

2. After the video-conference screen appears in one of the people pictures, use the remote control or other supplied control to open or join a video conference. The remote control operates the video-conference equipment that links the host Halo location and the video-conference participants. See the instructions provided for the video-conference equipment.



TIP: If you have a wireless video-conference remote control that does not work reliably, point it below the upper display.

TIP: If you include a video conference that appears in the directory as , it is not available to join your meeting at this time.

In each Halo location, video-conference participants are shown in one people picture—the layout depends on the configuration of the equipment. Similarly, participants in all Halo locations are shown to video-conference participants.



During the meeting, the leader of the video conference uses the remote control or other supplied control to manage the video conference. See the instructions provided for the video-conference equipment.

Although transmissions among Halo locations are normally encrypted to provide another layer of security, encryption for video-conference transmissions is determined by settings in the video-conference equipment.

When the meeting ends, the video-conference connection automatically ends, however, you have the option to keep the phone connected if you are in a phone call. Once you select End Meeting, a dialog appears asking if you want to continue the phone call. If you do not respond, the phone call will end automatically within 30 seconds.

Connecting a participant by phone

If your Halo location is equipped with a Halo telephone, you can add one or more people to your meeting, even if they're not in a Halo location or video conference. Each Halo location with a phone can have one telephone connection to the meeting. Telephone participants can hear and be heard by everyone at the meeting, but they cannot see what's happening.

1. On the upper display, point to the  Phone icon at the top-left corner of the screen.
2. Enter the phone number by clicking the phone buttons, then click Call to dial the number.



TIP: Click  to backspace and correct one or more digits. Click  (comma) to insert a 1-second pause in the number to be dialed.

3. If you want to enter additional digits after you dial the phone number, click additional phone buttons—the digits are displayed as * to protect private passcodes.

When a phone connection is established, the  Phone icon in the top-left corner changes to  as a reminder that your phone line is in use. When the meeting ends, all phone connections automatically end.

A participant cannot call into a Halo meeting from the outside. Instead, someone in a Halo location must call out to the participant.



TIP: You can connect more than one phone participant if you phone into a separate audio conference on a Halo phone line.

TIP: You can call someone even if a meeting is not in progress. When the phone call is finished, point to the  Phone icon at the top-left corner, then click End to free the line. The phone line is not automatically freed when a phone participant hangs up.

When a meeting ends, you have the option to keep the phone connected. Once you select End Meeting, a dialog appears asking if you want to continue the phone call. If you do not respond, the phone call will end automatically within 30 seconds.

Checking the status of a meeting

Several indicators on the upper display give information about the locations in your meeting.



About your location...



This colored Phone icon at the top-left corner of the screen means a phone participant is connected from your location.



This colored Share icon at the top-right corner of the screen means your location is sharing content that other locations can see.

1:25 PM

The local time is shown in the meeting diagram or above the Manage icon at the bottom-left corner of the screen.

About other locations (next to the location names)...

Location name

Names of the other locations are shown in the meeting diagram or at the bottom of the upper display. The names are shown in the order they appear in the people view, left to right. For a location with one lower display, names are also shown below each picture in the people view.



This indicator means a phone participant is connected from the location.



This indicator means the location is sharing content that other locations can see.

5:55 PM

The local time is shown for each location.

About the current meeting (near the bottom-right corner of the display)...



These indicators mean your Halo location has encryption capability and current Halo transmissions are encrypted () or unencrypted (). Halo transmissions are normally encrypted for an added layer of security in addition to the private Halo network. If no indicator is present, your location does not have encryption capability.



This indicator means a Halo repair technician is connected to the meeting and is performing maintenance.

Ending a meeting

A Halo meeting ends when someone in one of the locations ends the meeting.

1. On the upper display, point to the  Manage icon at the bottom-left corner of the screen, then click  End Meeting.

NOTE: When a meeting ends, you have the option to keep the phone connected. Once you select End Meeting, a dialog appears asking if you want to continue the phone call. If you do not respond, the phone call will end automatically within 30 seconds.

2. Click Yes when prompted. All locations are disconnected. All phone participants are automatically disconnected. Video-conference participants are automatically disconnected from all Halo locations, but they remain connected to each other.
3. If your location has a wireless mouse, store it in the holder. This keeps its battery charged.

A meeting also ends when the next-to-last location is removed from the meeting.

After a period of inactivity, the ambient lighting dims, and eventually the Halo screensaver appears in the upper display. Move the mouse to restore operating conditions.

3 Conducting Meetings

A simple face-to-face discussion may be sufficient for some meetings, but many meetings require other options for optimum collaboration. For example, you may want all participants to see an object that is present in one location, or you may want to invite people in another location to join the meeting.

Sharing a laptop screen with other locations

If you have a presentation or other information on a laptop computer, you can share it with all participants. Your laptop screen is shown to all Halo locations on the upper display.

1. Connect the VGA cable on the Halo table to the VGA output port of the laptop computer.
2. Turn on the computer and enable its VGA output port. On some laptop computers, you turn on the VGA output by pressing a hot-key combination, such Fn+F4 or Fn+F5 (see your laptop computer manual).
3. On the upper display, point to the  Share icon at the top-right corner of the screen, then click  Laptop.
4. Make sure your laptop screen appears in the preview window. The preview window is not shown to other participants. If the window is blank, check the connection and make sure the laptop VGA output is turned on.
5. If you also want to share audio from the laptop, and if the VGA cable has an audio plug, connect the audio plug to the laptop's headphone jack or audio output. Be sure to do this before sharing. *Adjust the volume on the laptop before continuing.*
6. In the preview window, click Share Now. This shows the laptop screen to other participants. See the following table for other actions.
7. To stop showing the laptop screen to other participants, point to the  Share icon at the top-right corner, then click  Unshare.



To do this...	Do this...
Preview the screen before sharing it	Point to  Share icon, then click  Laptop—or before the meeting starts, share the laptop screen
Stop sharing the laptop screen	Point to  Share icon, then click  Unshare
Show your setup screen temporarily	Point to  Manage icon, then click  (other locations continue viewing the laptop screen)—click Manage,  to view the shared laptop screen again
Show part of the laptop screen you can't see in the upper display	Move your laptop mouse to that part of the screen (see the tip below)
Point to details on the laptop screen	Use the Halo mouse to drag the shared pointer  , which is visible in all locations (but not to video-conference participants)
Let another location point to details on the laptop screen	Someone in another location uses the Halo mouse to drag the shared pointer 
View content from another location	Someone in the other location shares a laptop screen or object (the new content replaces the old content on the upper display)



TIP: The best views are obtained when the laptop computer screen is set to XGA resolution (1024 × 768 pixels) and 60 Hz refresh rate. If the laptop uses higher resolution than XGA, only part of the laptop screen is visible in the upper display. Use your laptop mouse to slide the image so you can see the area you want. If the laptop is using an Extended Desktop, set the resolution of the second display to 1024 × 768 pixels.

TIP: You can show your laptop screen on the upper display even if a meeting is not in progress. For example, you can check how your laptop screen will look before the meeting starts.

TIP: If the VGA cable at your location also has an audio plug, you can also share audio output from your laptop computer or any other audio source. Connect the audio plug to the headphone jack or audio output. Adjust the volume using the control on the laptop. When you click Share, Laptop, Share Now, both video and audio signals are shared with all locations.

Sharing a physical item with other locations

NOTE: Only certain Halo locations are equipped to show close-up views of physical objects to other locations. If you point the mouse at the  Share icon on the upper display and  Table is listed there, then your location has an overhead camera for showing objects.

If you have a sketch, model, or other physical object, you can share it with all participants by using the overhead camera—but only if your Halo location has an overhead camera. The object is shown to all Halo locations on the upper display.

1. Place the object on the center of the middle table.
2. On the upper display, point to the  Share icon at the top-right corner of the screen, then click  Table.
3. Move the object so it is centered in the preview window or in the illuminated area of the table. The preview window is not shown to other participants.
You can also adjust focus and zoom at this time—see the following table.
4. In the preview window, click Share Now. This shows the object to other participants. See the following table for other actions.
5. To stop showing the object to other participants, point to the  Share icon at the top-right corner, then click  Unshare.



To do this...	Do this...
Preview the object before sharing it	Point to  Share icon, then click  Table—or before the meeting starts, share the object
Stop sharing the object	Point to  Share icon, then click  Unshare
Zoom in or out on the object	Point to  Share icon, then click  or  one or more times
Adjust the focus of the image	Point to  Share icon, then click Focus (the focus is automatically adjusted)
Turn the illuminating light on or off	Point to  Share icon, then click Light
Point to details on the object	Use the Halo mouse to drag the shared pointer  , which is visible in all locations (but not to video-conference participants)
Let another location point to details on the object	Someone in another location uses the Halo mouse to drag the shared pointer 
Show your setup screen temporarily	Point to  Manage icon, then click  (other locations continue viewing the object)—click Manage,  to view the shared object again
View content from another location	Someone in the other location shares a laptop screen or object (the new content replaces the old content on the upper display)



TIP: You can show an object on the upper display even if a meeting is not in progress. For example, you can check the object's position and lighting before the meeting starts.

Sharing a video-conference presentation

If a video-conference participant displays a presentation during the conference, you can share the presentation with all Halo participants on the upper display in all Halo locations. However, only a person in the host Halo location, where the equipment is installed, can take this action.

1. Make sure the presentation is displayed by someone in the video conference. See the instructions provided for the video-conference equipment.
2. On the upper display, point to the  Share icon at the top-right corner of the screen, then click  Video Conf.
3. In the preview window, click Share Now. This shows the exhibit to other Halo locations.
4. To stop showing the exhibit to other Halo locations, point to the  Share icon at the top-right corner, then click  Unshare.

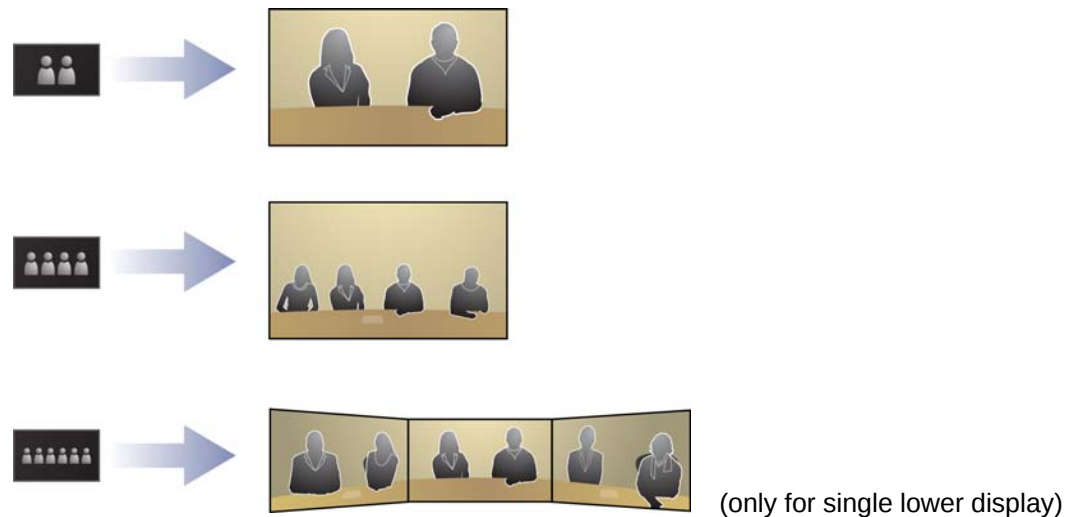
To do this...	Do this...
Stop sharing the presentation with Halo locations	Point to  Share icon, then click  Unshare
Show your setup screen temporarily	Point to  Manage icon, then click  (other locations continue viewing the presentation)—click Manage,  to view the presentation again
Share a Halo laptop screen or object with the video conference	Someone in a Halo location shares a laptop screen or object (the new content replaces the old presentation)

Changing the view in people displays

Whenever a Halo meeting starts, or whenever a location is added to a meeting, the people view adjusts to the optimum view based on the seating capacities of all the locations. However, you can often choose a different view that shows a closer view of the participants. For example, you might want to do this if only a few people are attending the meeting and several seats are empty in one or more locations.

1. On the upper display, point to the  Manage icon at the bottom-left corner of the screen.
2. Click one of the available view options under People View:  or  or .
3. When prompted to confirm the action, click Yes.

NOTE: The options available in your location depend on the number of lower displays in your location and on the seating capacities of other locations in the meeting. In certain situations, you may have no options in your location. The six-person option () is available only in locations with one lower display.

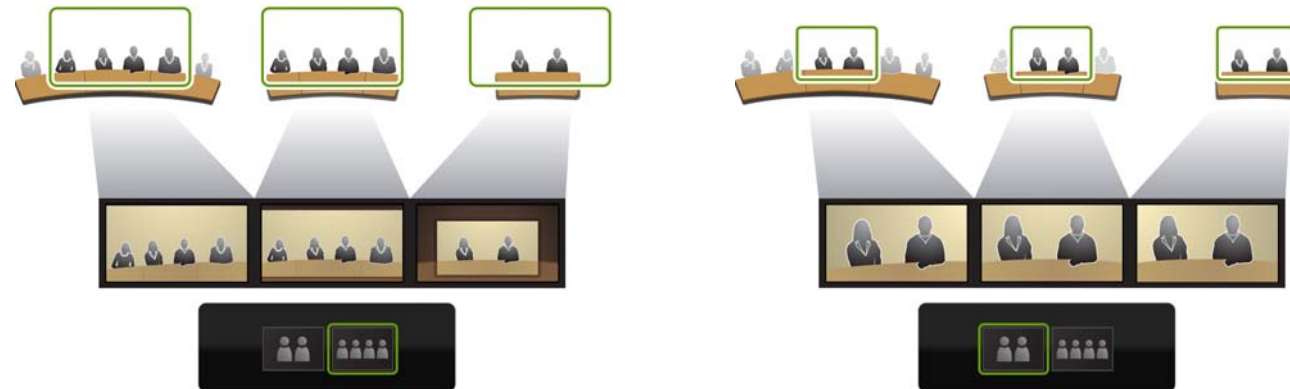


NOTE: For a location with only one lower display, the lower display automatically shows one, two, or three people pictures. The number of pictures depends on the number of remote locations and their seating capacities. The  view option is available only for a meeting with one remote location that has six seats—this option shows all six people in three people pictures.

Here are some tips about changing the people view:

- In a meeting with three or four locations, all locations see the same size view in each people picture. If anyone changes the view, it affects the views shown in all locations. A location with two seats may appear in a smaller picture in a four-person view—so all participants in the meeting appear at the same size. See the examples below.
- In a meeting with only two locations, someone in a location with one lower display may be able to change the view without affecting the view shown in the other location. However, if someone in a location with four seats changes to a two-person view, the view shown in the other location also changes.
- In some situations, some participants at the ends of the table in one location may be off-camera and not shown in the other locations. See the examples below.

For a location with three lower displays, the following examples show how locations with different seating capacities may be displayed for different view options.



For a location with one lower display, the following examples show how locations with different seating capacities may be displayed for different view options.



Adding more locations to a meeting

If an existing meeting contains fewer than four locations, you can add one or two additional locations to the meeting at any time. A meeting may have no more than four locations, and no more than one video conference.



TIP: If a shared screen is displayed, point to the  Manage icon at the bottom-left corner, then click  to show the setup screen. If the directory of Halo sites is hidden at the top of the setup screen, click Directory ▼.

1. In the directory of Halo sites, click the desired location or locations . You may have to click ◀ or ▶ to find a location in a long list.

Some locations may be listed under their company names or city names—you must click the company name  or city name  to see locations at that company or city.

For more information about selecting locations for a meeting, see “Starting a meeting” on page 10 and “Including video-conference participants” on page 13.

2. In the meeting diagram, click Invite to invite the locations to the meeting. Halo locations join the meeting after they accept the meeting invitation.

NOTE: The people view may become blank temporarily while the new locations are added to the meeting, then the view automatically adjusts for the new locations. Also, the order of locations in the people view may be different after the new locations are added—see “Checking the status of a meeting” on page 16.

When you add locations to a meeting and whenever necessary during a meeting, the audio system automatically corrects for acoustic variations in the locations. This correction takes less than a minute, and occasionally you may hear a temporary echo during the correction process.

Removing a location from a meeting

You can delete a location from the meeting at any time.

1. If a shared screen is displayed, point to the  Manage icon at the bottom-left corner, then click  to show the setup screen.
2. In the setup screen, point in the meeting diagram to the location you want to remove, then click  Remove.



TIP: If that location is a video conference or a host for a video-conference, video-conference participants will be disconnected automatically. However, they will remain connected to each other.

TIP: If  is shown for that location, a phone participant is connected from that location. That participant will be disconnected automatically.

Removing the last connected location ends a meeting automatically.

Withdrawing from a meeting

You can withdraw your location from a meeting at any time, and the meeting will continue uninterrupted.

1. If a shared screen is displayed, point to the  Manage icon at the bottom-left corner, then click  to show the setup screen.
2. In the setup screen, point in the meeting diagram to your location, then click  Remove.

When you withdraw from a meeting, any video-conference participants and phone participant connected from your location are disconnected automatically. However, video-conference participants remain connected to each other.

If only one location remains after you withdraw from a meeting, the meeting automatically ends.

Controlling your upper display

Whenever a location is showing a laptop computer screen or object, the upper display in all Halo locations normally shows the shared content. However, if you want to adjust your setup, you can switch to your setup screen, even while you or someone else is sharing. Or, if nothing is being shared, you can hide your setup screen so it is not a distraction to those in your location.

1. On the upper display, point to the  Manage icon at the bottom-left corner of the screen.
2. To see the setup screen, click  when viewing shared content or a blank display, or

To hide the setup screen or see shared content, click  when viewing the setup screen — if nothing has been shared, the display is blank.

Changing the view in your upper display does not affect the upper display in any other locations.

Changing the on-screen language

In certain locations, you can change the language used on the setup screen and other parts of the Halo interface. This does not affect other locations.

1. On the upper display, point to the  Manage icon at the bottom-left corner of the screen.
2. Click  Language.
3. In the list of languages, click the language you want.

Adding interpretation services

If a meeting involves participants who speak different languages, you may want to have an interpreter participate in your meeting. After you or your company establishes a service contract with Language Line Services, you can easily add an interpreter to any meeting that has a Halo phone. For a fee, this service provides confidential interpretation from English into more than 150 other languages, including sign language with an on-site interpreter.

If you or your company wants to establish a service contract or inquire about interpretation services and fees, contact Language Line Services through their web site <http://www.LanguageLine.com>

After you establish a service contract, Language Line Services gives you a contact phone number and identification number. These services are available:

- If you want an interpreter connected by phone, you can contact Language Line Services any time before or during the meeting and request a phone interpreter.



TIP: A phone interpreter requires a Halo phone connection. You cannot connect an interpreter if all locations in the meeting have phone participants or do not have Halo phones.

4 Getting Assistance

If you ever need assistance with your Halo system, help is always available quickly from the Halo concierge. The concierge is an expert on the Halo system.

- If your Halo setup screen is available and your location has a Halo phone, point to the  Help icon at the bottom-right corner, then click  Call Concierge. The concierge joins your meeting via a phone connection.

The Help icon at the bottom-right corner changes to  as long as the concierge is connected.

When the call is finished, point to the  Help icon at the bottom-right corner, then click End to free the phone line.

- If the Halo phone line is in use, the location has no Halo phone, or the Halo system is not operational, call the Halo concierge at the phone number listed on the plaque on the Halo table. The Halo phone number varies from country to country.

The Halo concierge is available 24 hours a day and provides these types of help:

- Assist you setting up or conducting a meeting.
- Answer questions about operating your Halo system.
- Diagnose and fix problems by remotely operating any of the systems—even while a meeting is in progress.
- Arrange the rapid replacement of any defective equipment.
- Help set up a meeting with another company not listed in your Halo directory.



TIP: If the Halo phone connection in your location is being used by a participant or interpreter, you cannot contact the concierge on that line. Either ask someone from another location to contact the concierge, or use a cell phone or other phone line to call the Halo phone number.
