



OTN Training Reference Manual

**Education and Administration e-Training
Course:**

Polycom HDX 7000 Reference Manual

About this Guide

This guide includes all of the printable PDFs from the Education and Administration e-Training course for the Polycom HDX videoconferencing system.

Learning Objectives:

- Demonstrate an understanding of the mission, services and impact of the Ontario Telemedicine Network
- Identify and explain basic terms and concepts associated with educational and administrative telemedicine delivery
- Acquire knowledge and skill in utilizing the Polycom HDX telemedicine equipment for educational and administrative purposes
- Demonstrate an understanding of OTN web based applications including webcasting and Ncompass
- Be able to effectively participate and host an educational and administrative event via videoconference

Table of Contents

UNIT 2 - AN INTRODUCTION TO THE ONTARIO TELEMEDICINE NETWORK.....	4
OTN Member Facing Services.....	5
UNIT 3 - TELEMEDICINE 101: BASIC TERMINOLOGY.....	6
Key Telemedicine Terms and Concepts.....	7
Privacy and Security in Educational and Administrative Sessions.....	11
UNIT 4 - TELEMEDICINE EQUIPMENT TRAINING - POLYCOM.....	13
Polycom HDX Quick Reference Guide.....	14
Polycom Remote Control Quick Reference Guide.....	15
Hooking Up a Laptop Quick Reference Guide.....	16
Equipment Troubleshooting.....	17
UNIT 5 – PARTICIPATING AND HOSTING EDUCATIONAL AND ADMINISTRATIVE EVENTS.....	19
How to Set Up the Room for a Telemedicine Event.....	20
Tips on Participating in a Telemedicine Event.....	21
Videoconference Etiquette Guidelines.....	22
Tips on Hosting or Moderating a Telemedicine Event.....	23
Powerpoint Presentation Guidelines for Videoconferencing.....	24
Presenter Guidelines.....	25
UNIT 6 – OTN SCHEDULING AND WEBCASTING SERVICES.....	26
How to Access Live and Archived Webcasts – Check Sheet.....	27



UNIT 2 - AN INTRODUCTION TO THE ONTARIO TELEMEDICINE NETWORK



The OTN Member Facing Services

Regional Managers

- Lead the process of setting up and managing sites and systems across the province
- Provide excellent customer service to internal and external customers, every day, everywhere
- Assist new and existing members with scheduling and establishing telemedicine partnerships
- Submit training requests on behalf of members to the training team

Schedulers

- Assist in scheduling clinical, educational and administrative events
- Work with members using three models including: self-scheduling, assisted and full service scheduling
- Work closely with other departments at OTN to ensure the planning and execution of an event run smoothly

Trainers

- Provide live training sessions to new members that focus on knowledge acquisition and application
- Offer refresher courses for existing members and sites
- Design and manage interactive eTraining courses that incorporate multimedia objects, videos and simulations in order to bring online content to life

Service Desk Representatives

- Respond to members by providing expert technical support before, during and after videoconferences
- Reconnect dropped or missed calls and troubleshoot video and audio difficulties
- Monitor webcasts to ensure technical quality



UNIT 3 - TELEMEDICINE 101: BASIC TERMINOLOGY

Key Telemedicine Terms and Concepts

Telemedicine

Telemedicine refers to the process whereby medical information is transferred through the phone or the Internet or other networks for the purpose of consulting and sometimes performing remote medical procedures or examinations. Typical telemedicine events at OTN are performed via videoconference and involve:

1. A medical consultation between a patient and a physician.
2. Health care professionals discussing a case

Videoconference

Videoconferencing uses telecommunications of audio and video to bring people at different sites together for a meeting. As we will see shortly, this can involve a meeting between two sites, or involve the participation of multiple sites. Besides the audio and visual transmission of meeting activities, videoconferencing can be used to share documents, computer-displayed information such as powerpoint slides, videos and software applications.

Learning Content Management System

A learning content management system (LCMS) is software for delivering, tracking and managing training/education. Most LCMSs are web-based to facilitate access to learning content and administration. This allows learners to access a wide variety of interactive educational materials from any computer that has an internet connection. The LCMS system used by OTN is called Desire to Learn, and contains individual courses, searchable learning objects, course lists, and educational calendars.

Telemedicine Coordinator

The Telemedicine Coordinator is the person in charge of the videoconferencing equipment at each site. This job is often shared among several individuals, and has three major components:

1. Resource Person: The TMC is the first point of contact for anyone using the equipment at their site. They are an expert on how to operate the equipment and deliver effective videoconference presentations. They also know how to access resources such as the OTN website, contact the Regional Manager or request training from the training department.



2. Scheduler: The TMC is responsible for scheduling videoconferences at their site. This may involve interacting with the OTN scheduling office using the Videoconference Request Form, or scheduling sessions themselves using the Ncompass online scheduling software.
3. Technical Support Coordinator: The TMC must ensure that all users of the videoconferencing equipment know how to contact the OTN Service Desk if they are in need of technical assistance of any kind.

Types of Videoconferences

Here at OTN, we have broken our types of videoconferences into 3 main categories:

1. Educational: Videoconferences that are focused on training, learning and continuing professional development. Some examples include lectures, workshops or case-based learning sessions. Educational events can either be:
 - (A) Closed – where participants are pre-determined and invited
 - (B) Open – anyone can sign up and participate in this event
2. Administrative: Videoconferences that involve meetings between different sites. Some examples include committee meetings, announcements or policy discussions.
3. Clinical: Videoconferences that are focused on patient care. These are the foundation and focus of OTNs services and have 2 subcategories:
 - (A) Direct Clinical: A consultation involving a patient and a physician.
 - (B) Indirect Clinical: A conference that does not include a patient. This typically involves physicians or health care providers discussing specific patient cases.

Host vs. Participant

Host

All videoconferences have one site that is designated as the host site. The host is responsible for:

1. Scheduling the event
2. Making sure that the videoconference connection is established properly. This is achieved by either dialing the remote site directly (in a point to point call), or performing a roll call to ensure that all sites have been connected (in a multipoint call)

In a clinical event, the host site is the one that has the consulting physician. In an educational event, the host site has the presenter at it. In an administrative event, the host site has the moderator at it.



Participant

All other sites involved in a conference that are NOT the host site are called participants. A participant merely has to have their videoconference system turned on 10-15 minutes prior to the event, and the session will begin automatically at the scheduled time.

Styles of Videoconferences

There are 2 styles of videoconferences, and they depend on how many videoconference systems are involved in the call.

1. Point-to-Point: This is a videoconference between only 2 sites. For these, you will always see the other site on the monitor, and the other site will see you on their monitor. The microphone usually stays on for these videoconferences, and the participants interact very much as if they are in the same room. A typical point-to-point call begins when the host site picks up the remote and manually dials the participant site, very much like calling someone on the telephone.
2. Multipoint: This is a videoconference involving more than 2 sites. It could be as few as 3 sites or as many as 40 sites or more. OTN sets up all its multipoint calls using a program called a bridge. A bridge is like the hub of a wheel, and all the spokes of the wheel are the videoconference systems involved in a call. When a call is scheduled to begin, the bridge dials all of the systems one time and connects them automatically. The call will also end promptly at the pre-determined end time. It is important to note that all of OTN's videoconferences are fully encrypted and secure. No unauthorized system can dial in and see or hear anything you are discussing once a call has begun.

Modes of Videoconferences

In a Multipoint event there are three possible modes that can be selected. They are:

- Voice Activated
- Continuous Presence
- Lecture

Voice activated mode is the default setting for videoconferences. In a voice activated call, the camera will shift and display the site that is speaking. This means that this site will be displayed on the main screen of all the systems involved in the call, so it makes for an excellent mode for presentations, lectures, and multimedia presentations. It is important in a voice activated call for all sites except the speaking site to keep microphones on mute. The microphone should only be unmuted when a person at a site wants to speak.



Continuous Presence is a visual set-up where all sites are visible on the screen at the same time. In other words, the effect is much like “Hollywood Squares.” This set up works only when there are a few sites (lets say 5 or less) on a call and must be requested when scheduling your event.

Lecture Mode allows the site that is presenting to view the other sites in a rotating cycle during the videoconference. The participating sites will be displayed on the Lecturer’s screen for a predetermined duration. All of the other sites see the lecturer’s site on their screen. This also must be requested when scheduling your event.

Webcasting

Webcasting refers to the process where an educational videoconference session is broadcast over the web (Internet) at the same time. There are two kinds of webcasts:

Live Webcasts: For videoconferences with live webcasting, the presenter delivers the session from a videoconference location but where the session can be viewed either by videoconference or through the web. Participants viewing through the web only need to log onto a computer with Internet access. This session is time dependent, as participants must “tune into” the web at a specific time.

Archived Webcasts: This means that the session has been “taped” and is available for viewing at a later time. It is stored on the servers at OTN, and can be accessed through the Webcasting link on the OTN website.

Privacy and Security in Educational and Administrative Sessions

Before the Videoconference Begins:

Prepare and place a sign for use outside the door when a videoconference session is under way. The sign might read 'Videoconference in progress, please do not disturb'. This sign should be displayed prominently on the entrance to the room and posted before the session begins. In order to avoid unplanned interruptions, lock the door to the meeting room.

Please ensure that the camera on the videoconferencing unit is not pointing to or capturing a door opening or a door with a window. Unsuspecting patients could be walking by and inadvertently have their images captured and transmitted to individuals participating in your educational session.

If the telemedicine platform is situated in a multipurpose room and privacy is required, make sure the videoconference unit is turned off and unplugged when the room is being used for purposes other than telemedicine and back on when the occupation for those purposes is over.

"Mic-off" setting should be enabled prior to and at the conclusion of a session.

Always confirm that you have the correct address before dialing a participant site.

If your videoconference system is situated in multipurpose rooms please ensure that you cancel your registration and/or your videoconferencing system if you decide not to participate in an educational event. Otherwise your system will launch as scheduled.

If you are inadvertently connected with the wrong site and/or system please disconnect immediately and contact the OTN Privacy Officer at privacy@otn.ca to inform them of the incident. Ensure you leave your name and contact information.

If you are a participant in a telemedicine event and you see a patient or unusual activity on screen please contact OTN's Service Desk immediately.

During a Videoconference:

Verify that a secure connection has been made by ensuring that the lock icon in the upper right of the screen is in the "locked" position. If the lock is in the "open" position, notify the Service Desk of the problem prior to commencing the meeting.

If privacy is required during a videoconference, move the camera to a position in the room where no one can be seen, such as the ceiling or a sign on the wall. This can be set as “Preset 9” for easy access. Also ensure to put the microphone on mute. Now any participating sites will not be able to see or hear anything that is occurring in your room.

After a Videoconference:

When the telemedicine platform is a shared resource (i.e. being used in a boardroom or meeting room), consideration should be given to securing the remote control in a locked cabinet or in a location with limited access.

Where possible ensure the videoconference system is turned off and un-plugged. If this is not practical ensure the camera is left pointed to a place where a person will not be in view when a call comes in.



UNIT 4 – TELEMEDICINE EQUIPMENT TRAINING - POLYCOM



Polycom HDX Quick Reference Guide



1

Plug the power cable into the power outlet in the wall.

2

Plug the network cable into the network outlet in the wall. The network cable must be plugged into the OTN-dedicated network outlet.

3

Verify that the Power Bar is turned On – The power supplies the whole system – you can turn off your system here at the end of your session.

4

Verify that the monitor is on

5

Verify that the codec/camera is on by checking the switch on the front of the tower or by pressing the power button at the top of the remote control.

6

Place call to patient/virtual site. Press the Directory button on the remote – select entry from the Global directory and highlight the desired location
Press the **Call** button to connect to site.

7

Pick up the remote control.

Unmute your videoconferencing sound by pressing the orange “Mute” button located in the center of the remote control.



OTN SERVICE DESK 1-866-454-6861

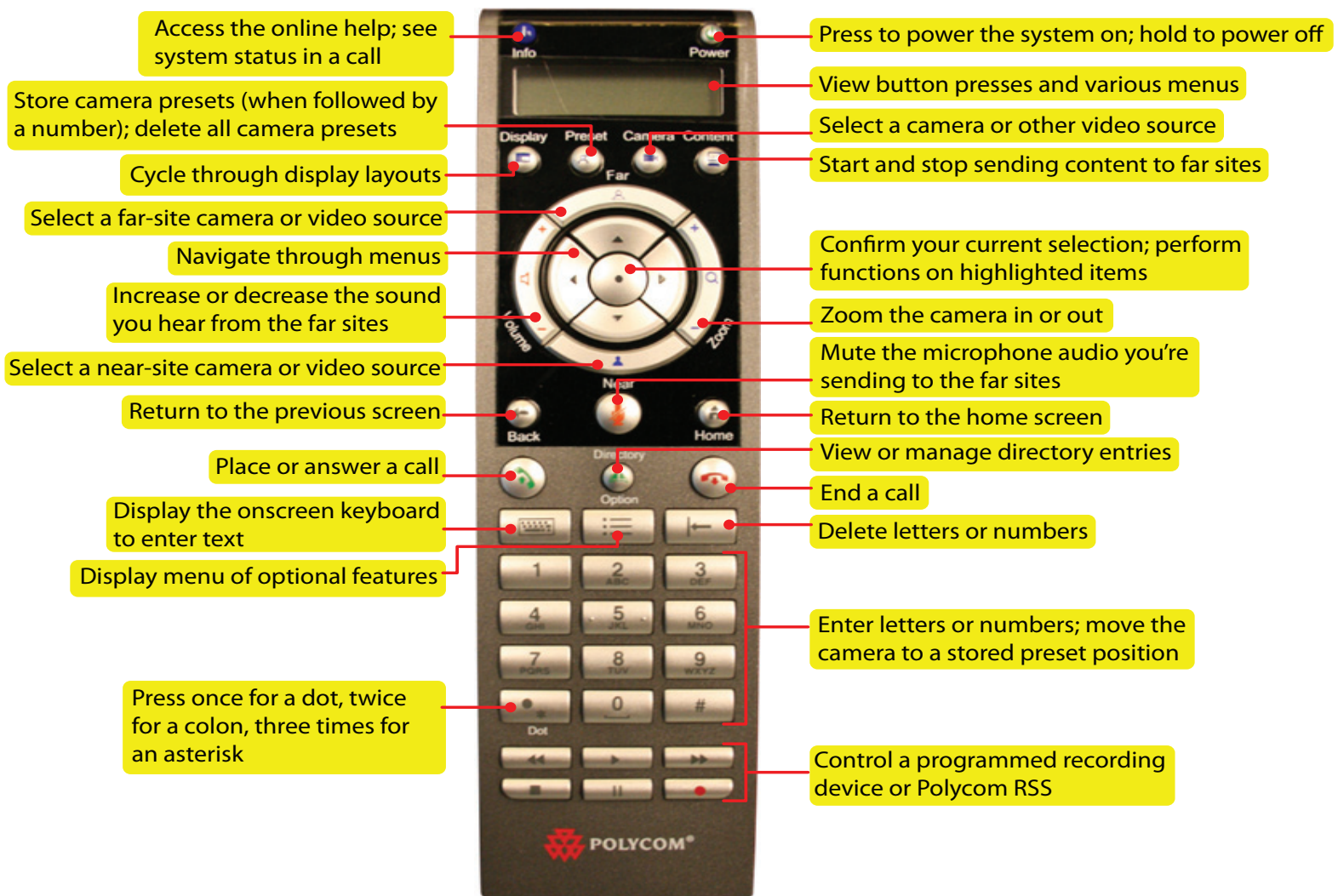
Reminder – provide site name/number when contacting service desk:

Remote Control

The diagram below illustrates the Polycom Remote Control and highlights some of the more commonly used buttons that are supported in OTN videoconferences.

Using the Remote Control

You use the remote control to place calls, adjust the volume, navigate screens, and select options.





Polycom HDX 7000 Hooking up a Laptop Quick Reference Guide



1

Connect the VGA cable from the videoconference system to the laptop.



2

Turn the power on the laptop.



3

Press the same keys you would use when displaying your desktop through a projector, usually one of the following combinations: Fn+F4 (or) Fn+F7 (or) Fn+F8.

4

To display the desktop:

- Press the silver “Content” button.
- Scroll using the arrows and select “PC” and hit enter.



5

To return to the camera view:

- Press the silver “Content” button again.
- Press enter to return to the camera view.

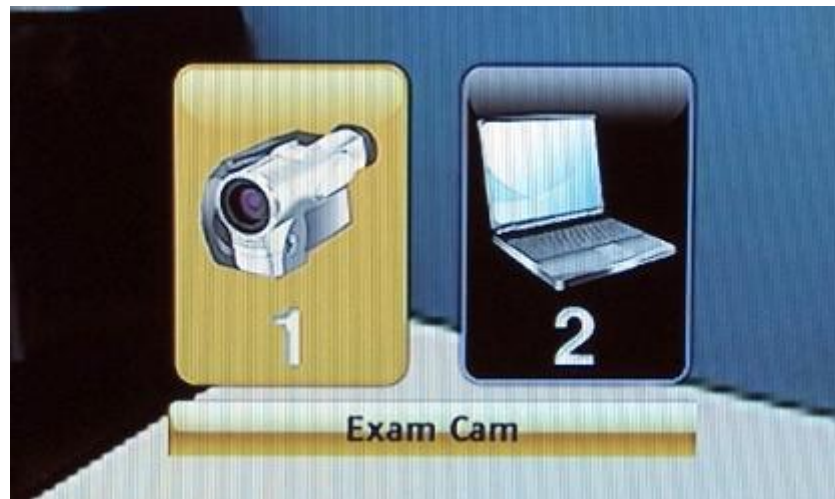
BEST PRACTICE

Make sure to switch between the desktop and camera view for more interactive presentations.

TROUBLESHOOTING

If the desktop still does not appear on the screen, you need to change the resolution of your computer. Select 1024 X 768 for the best results.

Step 1: For the Polycom HDX equipment there is the added step of selecting the appropriate peripheral device. When you press the Content button, you will have two options that include camera and laptop.



Step 2: Please navigate to the second option by using the right arrow on the remote. Select the laptop by pressing the enter button (circular button with a dot).



Step 3: To return to the main camera, please press the Content button and use the remote arrows to navigate back to the camera selection. Once again, please use the enter button to select the main camera.

OTN SERVICE DESK 1-866-454-6861



Equipment Troubleshooting

The system does not work / won't power up

- Verify that the system is plugged into the power outlet.
- Verify that the network cable is plugged into the appropriate port in the wall.
- Verify that the cables are securely plugged into the back of the codec.
- Call the OTN Service Desk if the above has been checked and problem persists.

I cannot connect to a site

- Check that all cables and plugs are securely plugged in.
- Check that you have the correct site selection.
- Call OTN Service Desk for assistance.

I cannot hear the other site

- Verify that the other site has un-muted their microphone.
- Verify that the other site has positioned their microphone correctly, if the microphone is movable
- Verify that your site has its volume turned up.
- Call the OTN Service Desk if the above has been checked and problem persists.

I hear echoes when I am speaking to the remote site

- Echoes are always caused by the far site in a call. Have the far site decrease the volume and make sure that their microphones are placed away from the system and monitor speakers.

I cannot see the other site

- Verify that your monitor is turned on.
- Make sure that the other site has their camera positioned correctly (not aimed at a wall).
- Call OTN Service Desk if the above has been checked and the problem persists.

My monitor is displaying black and white (no color)

- Check that all cables and plugs are securely plugged in at the back of the codec.

The session was interrupted and connections lost

- Keep system on, attempt to reconnect.
- Call the OTN Service Desk if the above has been checked and the problem persists.

My screen is dusty and has finger marks on it

- Clean with a damp cloth after turning off the monitor.
- To keep the system looking brand new, periodically clean it with a mild detergent solution.
- Never use strong solvents such as thinner or benzene, or abrasive cleaners since they will damage the cabinet.
- As a safety precaution, unplug the system before cleaning it. Never attempt to sterilize this unit. If required to be used in a sterilized environment, use suitable protective covers.



Accessing the OTN Service Desk

Examples of when to call your Local IT Person or Telemedicine Coordinator or the OTN Service Desk	
Your Local IT Person or Telemedicine Coordinator	OTN Support: 1- 866-454- 6861
Your internet is down	If call does not connect
Network cable is broken or missing	If call quality is poor
	If video camera is experiencing problems
You cannot find the remote control	Call drops and you are unable to reconnect
You do not know which network jack to plug into	

OTN Service Desk Support Hours: Mon – Fri 7:00AM to 7:00 PM



UNIT 5 – PARTICIPATING AND HOSTING EDUCATIONAL AND ADMINISTRATIVE EVENTS

How to Set up the Room for a Telemedicine Event

Make sure that moderators and presenters are given prominent seats in the room and that their positions are framed for the camera

Verify all presets for the meeting. For example,

Preset 1: Shot of the entire room

Presets 2-5: Shots of presenters/moderators

Presets 6-8: Shots of groups around the table

Preset 9: Privacy shot of ceiling or sight sign

Place the microphone in the appropriate position – either under the monitor or at one end of the boardroom table

Ensure that any windows are covered with blinds and are not framed in any of the presets. Sunlight can cause glares and shadows that can affect the video quality

Verify that any multimedia devices such as computers or projectors are readily accessible to the presenters

Appoint a “director” that will be in charge of the remote control. Their sole job during the videoconference will be to ensure that the proper person or graphic is in on screen at the proper time

Tips on Participating in a Telemedicine Event

- Turn off cellular phones and wireless devices
- Bring your copy of the agenda and handouts
- Keep the mute button engaged unless you are speaking
- Operate the technology during a videoconference as required
- Act professional at all times
- Refrain from side conversations during the meeting as they can be very distracting to others
- Terminate the videoconference call if Facilitator is not present
- Call the OTN (Ontario Telemedicine Network) Help Desk in the event of a technical problem during a meeting

Videoconference Etiquette Guidelines

- **Participate in an audio-visual check**
 - Start the video conference with a roll call or speak with the host site
- **Mute appropriately**
 - Remember to mute when not speaking. This will ensure that video does not switch to their site if someone coughs or makes a noise when using voice activated mode. It will also prevent such noises from being broadcast to the other sites and acting as a distraction.
 - If you need to move the microphone during the session, mute it first.
- **Engage the remote audience**
 - Look into the camera occasionally when you are speaking. This helps you to maintain good eye contact with the remote audience.
 - Do not move out of camera range so that people will always be able to see you.
- **Speak clearly and naturally**
 - The microphone will automatically amplify the sound.
 - There is no need to shout. Quiet talkers should sit closer to the mic.
 - Modulate your voice so it is not a monotone.
- **Pause between speakers**
 - Due to a slight audio delay, pause and wait for a longer than normal period if you want to be able to hear comments or are expecting a response from other sites.
- **Reduce background noise**
 - Avoid unnecessary tapping, rustling of papers, and side conversations when your site is speaking, as this will add audio noise for the receiving sites.
- **Enhance video display**
 - Avoid, if possible, rapid movements or erratic hand gestures.
 - Avoid wearing clothing with loud patterns, or solid red and white.
- **Professional behaviour**
 - Be aware of the start and end time scheduled
 - Assume that you are visible and can be heard throughout the meeting.
 - Do not monopolize the conversation.
 - Do not interrupt when others are talking.
 - Use respectful language at all times.
 - Focus discussion and questions on the content of the session.
 - Differences of opinion should be conceptual, not personal.
 - Respect individual confidentiality.
- **Administrative meetings**
 - Participates at all sites should be introduced.
 - Identify your name and site whenever you respond—until everyone is oriented to each other.
- **After the session**
 - Leave room clean and put video conference equipment away.



Tips on Hosting or Moderating a Telemedicine Event

- Ensure that the meeting room and technology is available and reserved for the meeting
- Turn videoconference equipment on at start of the meeting
- Explain the videoconference system and process to the Chairperson/ Participants as well as inform the Chairperson/Participants about videoconference etiquette and moderation skills
- Ensure the Chairperson's equipment requirements are in place and functioning properly
- Initiate the videoconference call for a point-to-point meeting (for Chairperson Site only)
- Distribute agendas and handouts
- Operate the technology during a videoconference and or provide basic on-site technical support
- Terminate the videoconference call
- Call the OTN Help Desk in the event of a technical problem during a meeting

While videoconferencing is an effective communications medium, you must be prepared to accept a small loss of resolution. Your visual guides needs to be adapted in order to maximize the audience's view at both the local and remotes sites. The following suggestions are for presenters in order to help them create effective PowerPoint slides.

- Use a simple PowerPoint template in landscape format
 - Use dark print with a plain light background or light print and a plain dark background; a dark blue background is recommended
- Allow for a 1 inch margin on all borders
- Limit the amount of words per slide
 - use no more than 5 bullets of information per slide;
 - use brief phrases instead of sentences
- Keep any graphics simple;
 - use simple bold tables like pie charts or bar graphs
 - avoid complex tables and scatter plots
- Use a consistent font size,
 - At least 30-point font for text and 44 for headings
- Select a simple, clear, and bold font: **Arial, Tahoma, Verdana**;
 - Avoid italics
 - Use lower case for text
- Avoid animation and special effects (sounds, fly-ons, fade-ins)
 - Use simple slide transition
- Send a copy of the presentation to all receiving sites for distribution (in case of problems)
- If possible, have a second medium available (hard copy and document camera)



Guidelines for Presenters

- Avoid wearing white, brightly patterned or shiny clothing
- Arrive early (15-30 minutes) to review the presentation with your visual aids and organize placement of any equipment you will be using
- Obtain a list of participating sites from the TMC or support person
- Start and end on time
- Avoid rustling papers or tapping as the microphone is sensitive and these noises will be transmitted
- Relax & have fun (smile occasionally) while maintaining professional behaviour. Assume that you are visible and can be heard throughout the session
- Looking into camera will allow eye contact with the remote audience
- Ideally, have someone toggle between a view of presenter and the PowerPoint slides if being used—this provides a more interactive session
- Address each site for responses if time and number of sites permit

Presenters must comply with Ontario's Personal Health Information Protection Act (PHIPA)—all patient identifying information must be removed from any diagnostic image or document shared during the presentation.

Please see the attached QRG on Presenter Guidelines for more information.



UNIT 6 – OTN SCHEDULING AND WEBCASTING SERVICES



How to Access Live and Archived Webcasts – Check Sheet

- In order to view a webcast, participants must access the OTN Webcasting Centre at: <http://webcast.otn.ca/>

Note: Prior to viewing a session, it is recommended that you verify if your computer meets minimum hardware, software and network requirements (DSL, Cable Internet, etc.) by viewing the webcasting support page - <http://webcast.otn.ca/support.html> to test your media player. There is also a “How to Access Live and Archived Webcasts” training module available on the OTN Webcasting Centre training page - <http://webcast.otn.ca/training.html>.

Accessing Live Webcasts:

- To access **public live events**, click the “Live Events” link, then the “Public Events” link from the drop down menu (Or click the direct link - <http://webcast.otn.ca/liveevents.html>). Then select the title of the desired presentation
- To access **private live events**, click the “Live Events” link, then the “Private Events” link from the drop down menu (Or click the direct link - http://webcast.otn.ca/pp_liveevents.html). A login screen will appear. Enter your assigned user name and password and click the submit button. Select the desired webcast from the presentation titles provided

Accessing Archived Webcasts:

- To access **public archived events**, click the “Archived Events” link, then the “Public Events” link from the drop down menu (Or click the direct link - <http://webcast.otn.ca/archives.html>). Then select the title of the desired presentation
- To access **private archived events**, click the “Archived Events” link, then the “Private Events” link from the drop down menu (Or click the direct link - http://webcast.otn.ca/pp_archives.html). A login screen will appear. Enter your assigned user name and password and click the submit button. Select the desired webcast from the presentation titles provided

Note: OTN does **not** provide user names and passwords to session participants.

Using OTN's Webcasting Archived Events Search Tool Options:

- a. Enter a key word in "Search text" box and click "Find Presentation"
- b. Select host organization from drop down "Presenter" button and click "Find Presentation"
- c. Enter start date and end date to define search length and click "Find Presentation" to identify desired presentation