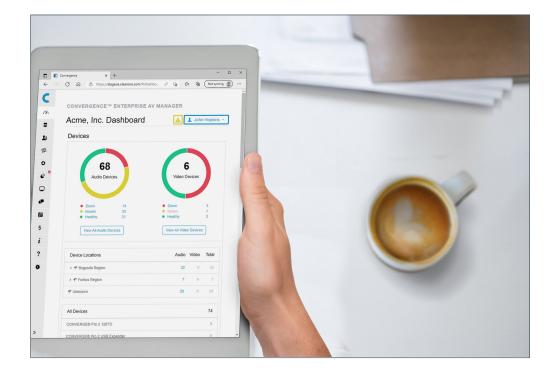


# **CONVERGENCE™ Enterprise AV Manager**





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# **Notices**

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### About CONVERGENCE Enterprise AV Manager

CONVERGENCE Enterprise AV Manager is single-tenant, single-hub software for an organization to centrally monitor and control their ClearOne Pro Audio and Video devices located worldwide. It supports the following:

- Pro Audio administration of:
  - CONVERGE® Pro 2 & Huddle DSP Mixers
  - Their P-Link peripheral mics and expanders
- Video Collaboration administration of:
  - COLLABORATE® Live video codecs
  - COLLABORATE Space

Additional details are available in the CONVERGENCE AV Managers datasheet.

#### Part Number

• SWR-1000-002-2 CONVERGENCE Enterprise AV Manager

### Step 1. Get a Free Trial License

a. Go to <u>CONVERGENCE<sup>™</sup></u> Enterprise AV Manager | AV Management Software – ClearOne.



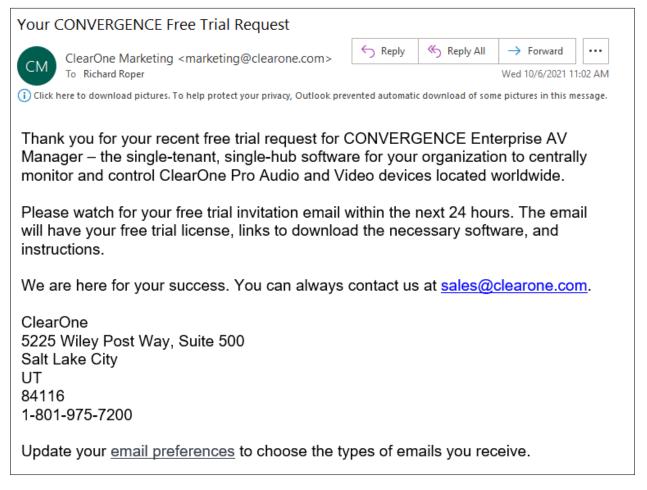
b. Click Get Free Trial, fill out the form, then at the bottom of the form, click Get Free Trial.

10	
10	
nstances required for high-availability redundancy (1-3)*	
2	
erver MAC addresses (if not to be connected to the Internet)	
irst name*	
Richard	
.ast name*	
Smith	
'itle/Job function [please select from list]*	
AV Practitioner (Integrator/Reseller)	`
Business Email*	
dick_smith@bestav.com	
Phone	
8883033352	
Company name*	
Best AV Inc	
Country*	
United States	`
itate	
UT	
City	
Anytown	
(IP	

c. The following message appears:

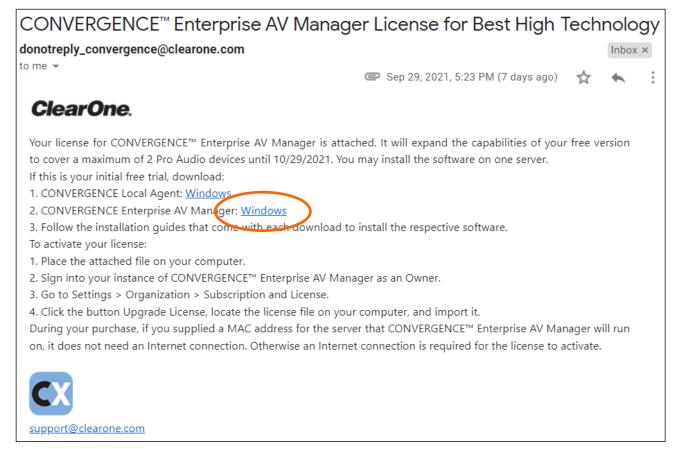
ClearOne.
Thank you!
Please watch for your free trial invitation email in your inbox within the next 24 hours from <b>donotreply_convergence@clearone.com</b> .
You may need to whitelist the address or "@clearone.com" domain to avoid spam filters.
Thank you,
ClearOne

d. Check your email inbox for an email from ClearOne Marketing similar to the following:



# Step 2. Download and Install Enterprise

a. When you receive your invitation email, **click** the **Enterprise link** to download your software.



b. Complete the **installation steps** as directed in the <u>CONVERGENCE Enterprise AV Manager</u> <u>Installation Guide</u>, included with the installation.

ClearOn		ation Guide
CONVERGENCE™ Software Version: 2.0.4	Enterprise AV Manager	r

c. As the invitation email indicates, after installation and sign-in, **navigate** to **Settings** > **Organization** > **Subscription and License** and click **Upgrade License**.

License and Subscrip	otion			
Account Number:	A10002	Status:	Overflow	Upgrade License
Start date:	8/31/2021	End date:		

In the resulting dialog, locate the license file from the invitation email and open it.

### **Step 3. Set Up Your Enterprise Account**

If the system does not display the Settings > My Account screen, then on the menu on the left, **click Settings**.

ClearOne.			
	CONVERGENCE™ E	ENTERPRISE AV MANAGER	
OVERVIEW			
7 Dashboard	Acme, Inc. Se	ettings 🛛 🔼 💽 🤆	
Servers	,	5	
1 Users	My Account Organiza	tion Network	
M History			
Settings	Username:		
	Richard.Roper	Email Address:	
DEVICES		Richard.Roper@clearone.com imported via	Change Email.
🗳 Pro Audio 🌷	First name:	LDAP	
	Richard	Password:	
COLLABORATE® SPACE	Last name:	Information imported via LDAP	Change Passw
🖙 Communications 🌷	Roper	COLLABORATE® Space (CS):	
SUPPORT	Role: Owner	You are signed out of CS.	Sign In Sig
i About		Death	have a 00 and 10
2 Help		Don't	have a CS account?

To set up an SMS text mobile phone number for alerts, click Change Number...

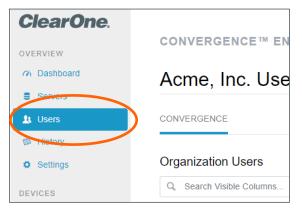
ClearOne.		
OVERVIEW	CONVERGENCE™ E	ENTERPRISE AV MANAGER
m Dashboard	Acme, Inc. Se	ettings
Servers		
1 Users	My Account Organizat	tion Network
🛱 History		
Settings	Username:	Email Address:
DEVICES	Richard.Roper	Richard.Roper@clearone.com imported via Change Email
🗳 Pro Audio 🅭	First name:	LDAP
	Richard	Password:
COLLABORATE® SPACE	Last name:	Information imported via LDAP Change Password
🖷 Communications 🕭	Roper	COLLABORATE® Space (CS):
SUPPORT	Role: Owner	You are signed out of CS. Sign In Sign Out
i About		Don't har e a CS account? Show up here
? Help		SMS text mobile phone number:
Updates		Phone number not defined Change Number

On the Change Number dialog window, enter your mobile phone number, then click Change.

Change Number	x
New Phone Number	
➡ +1 201-555-0123	]
Clicking Change below will send a verification text message to the above phone number.	
It will also send a warning text message to the old number if it exists.	
Cancel Change	

### Step 4. Add Users

a. On the left-side menu, click Users.



b. On the far-right of the Users screen, click the Add Users symbol.

ClearOne.	CONVERGENCE™ ENTERPRISE AV MANAGER	
OVERVIEW	Acme, Inc. Users	Richard Roper ~
Servers	CONVERGENCE	
<ul><li>History</li><li>Settings</li></ul>	Organization Users	10 Total, 10 Visible, 0 Selected
DEVICES	Q Search Visible Columns Search Show All	Last
COLLABORATE® SPACE	Status Name Email Addres	

- c. On the Add Users dialog window, do the following:
  - 1. Enter one or more email addresses for the users.
  - 2. Use the dropdown to **select a Role**.
  - 3. In the lower right, **click Add**.

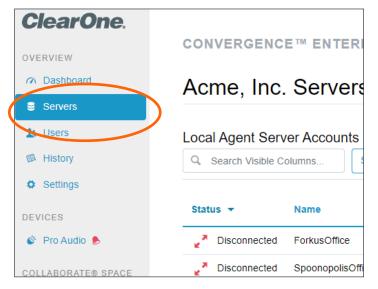
Add Users	×
Email Address(es):	jimmy@yopmail.com × 1
Sej	parate email addresses with semi-colons (",").
Each user above will get th	he following:
Role:	Monitor (2)
Language:	English
	Clicking Add will send an email to the above users inviting them to
	Cancel

d. Review the Users screen to verify that CONVERGENCE lists the users you added.

CONVERGENCE™ ENTERPRISE AV MANAGER							
Acme, I	nc. Users	A 🔿 🔿 🗶 Richard Roper ~					
CONVERGENCE	E						
Organizatior	n Users			11 Total, 11 Visil	ble, <mark>0</mark> Se	lected	
Q Search Vis	sible Columns	Search Show All		<u>±</u> × <b>±</b>	* ~	1	
Status 🔺	Name	Email Address	Role	Last Accessed	Туре		
Invited 10/5/2021 🗊	jimmy	jimmy@yopmail.com	Monitor	Never	Local		
Registered	jdhopkins	jdhopkins8791@gmail.c	com Owner	9/23/2021	Local		

# Step 5. Add a Local Agent Server

a. On the navigation bar, click Servers.



b. On the far-right of the Servers screen, click the Add Agent server account tool.

ClearOne.	CONVERGENC	E™ ENTERPR	ISE AV N	ANAGER	l	
<ul> <li> <i>∩</i> Dashboard         <ul> <li>Servers</li> </ul> </li> </ul>	Acme, Inc	. Servers			Richard Rope	er Y
1 Users	Local Agent Server Accounts 5 Total, 5 Visible, 0 Selected					
<ul><li>History</li><li>Settings</li></ul>	Q     Search Visible Columns     Search     Show All     Image: Column State of the server account       Add Agent server account					
DEVICES	Status 👻	Name	Devices	Monitoring System	Version Subnete	
🗳 Pro Audio 🅭	Disconnected	ForkusOffice	0	Off	0 of 0	
COLLABORATE® SPACE	Disconnected	SpoonopolisOffice	0	Off	0 of 0	

c. On the Add Agent Server Account dialog window, **enter** the **Agent Server account name** and **password** (not your personal account credentials).



**Important:** Take note of the password.

Then in the lower right, **click Add**.

Name:	Server007				
	Must be unique within your organization	n.			
Password:	••••••	ø			
	(Must be at least 8 characters long, contain a letter, a digit, and a special character, such as from: ~?@#\$%^&*()+={} ]]\\':'';.?.)				
	a special character, such as from: ~`!@				
Password	a special character, such as from: ~`!@ []\\':'',.?.)				
Password     Confirm:	a special character, such as from: ~`!@ []\\':'',.?.)	)#\$%^&*()+={}			

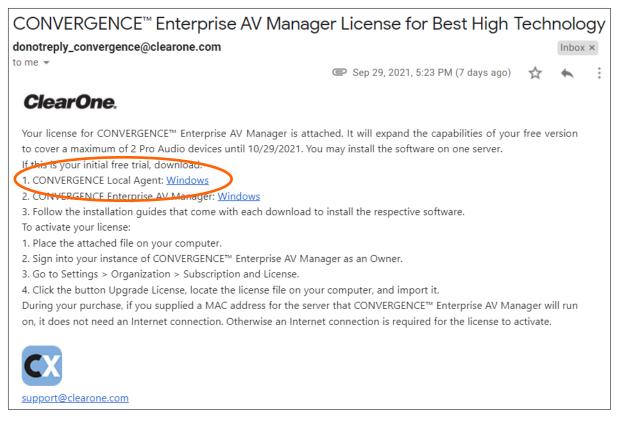
d. Review the Servers screen to verify that CONVERGENCE lists the server you added.

CONVERGENCE™ ENTERPRISE AV MANAGER								
Acme, Inc.	Acme, Inc. Servers							
Local Agent Serv	ver Accounts			6 Total, 6 V	isible, 0 Se	lected		
Q Search Visible C	olumns Sea	rch Sho	w All			Ξ+		
Status 👻	Name	Devices	Monitoring System	Version	Enabled Subnets			
Disconnected	ForkusOffice	0	Ø 01		0 of 0			
Disconnected	Server007	0	Off		0 of 0			
Disconnected	SpoonopolisOffice	0	Off		0 of 0			
Connected	AppsTesting200	7	<ul> <li>Active</li> </ul>	2.0.4.5	1 of 2			
Connected	BogusBranch	32	<ul> <li>Active</li> </ul>	2.0.3.10	1 of 2			
Connected	Staging	29	<ul> <li>Active</li> </ul>	2.0.4.2	1 of 2			

### Step 6. Set Up Local Servers

Now that you have a Local Agent Server account configured, you are ready to set up a Local Agent server.

- a. On the AV network of one of your organization's locations, either you or your organization's IT department should set up a Windows server. This should be on the network with the most ClearOne Pro Audio devices.
- b. From the email invitation you downloaded Enterprise from, **download the CONVERGENCE** Local Agent AV Manager.



- c. Install the downloaded "ConvergenceLocalAgentSetup.exe" software onto the server as described in the <u>CONVERGENCE Local Agent AV Manager Installation Guide</u>, included with the installation.
- d. On the server, from its web browser, using http://localhost as the address, **sign into the CONVERGENCE Local Agent AV Manager**.



Important: Take note of the username and password.

The server should have discovered all Pro Audio devices on the network.



**Important:** Ignore all red alarm bells.

e. Go to Settings > Organization > External Services.

Under "Connect to a central hub", click Configure.

Central Hub Connection:	
Not configured yet	Configure

- f. In the Connect to Central Hub dialog window, do the following:
  - In the "CONVERGENCE central hub URL" field, enter the domain name or Internet address you have set up and reserved for your instance of Enterprise AV Manager.
  - In the Central Hub Authentication section, enter the Name and Password of the Local Agent server account you set up in Enterprise AV Manager.
  - 3. In the lower right, click Save.

С	Configure Central Hub Connection						
	CONVERGENCE c	entral hub URL:					
	Domain name or	Internet address					
	<ul> <li>Central Hub</li> </ul>	Authentication					
	Name:	Agent server's account name					
	Password:						
		Cancel	ave				

The system displays the following:

Signed into https://ce.acme.com:443 as	Configure
SLCBranch	

g. You can sign out of Local Agent AV Manager from the My Account Menu.



h. Go back to your account on CONVERGENCE Enterprise AV Manager and see that your server is now connected with discovered devices.

ClearOne.	CONVERGENCE™ E	ENTERPRISE AV MA	NAGER			
OVERVIEW  Ch Dashboard  Servers	Acme, Inc. Se	ervers		•	Richard Rope	r ×
L Users	Local Agent Server Ac	counts		6 Total	, 6 Visible, 0 Sel	lected
<ul><li>History</li><li>Settings</li></ul>	Q Search Visible Columns.	Search SI	how All Monitoring		Enabled	Ξ+
DEVICES	Status Name	e Devices 🗸	System	Version 2.0.3.10	Subnets	

i. Repeat this process for each location you will be servicing. You will need a different Local Agent server account for each one. Name them in a way that will help you know where they are.

# **Step 7. Set Up Your Devices**

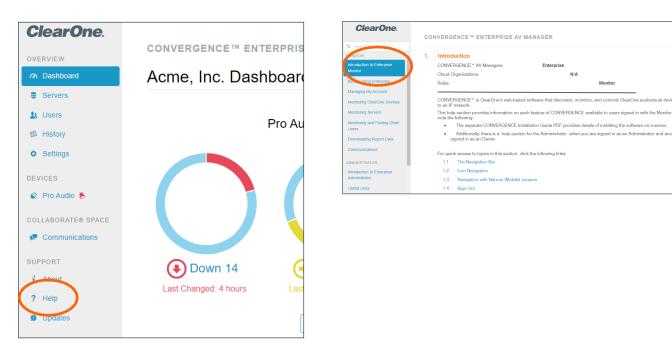
Now that you have a CONVERGENCE Local Agent server set up, Pro Audio devices should automatically show up. At first, you will see only the Pro Audio devices on the subnet of the server. You should see them summarized in OVERVIEW > Dashboard and listed in DEVICES > Pro Audio.

ClearOne.				
VERVIEW	CONVERGENCE™ ENTI	ERPRISE AV MA	NAGER	
n Dashboard	Acme, Inc. Dash	board		Richard Roper ~
Servers				
🛓 Users		Pro Audio Devi	aa Statua	©∎
History		PTO AUGIO Devi	ce status	
Settings				
DEVICES				
🗳 Pro Audio 🏓				
COLLABORATE® SPACE				
Communications				
UPPORT	Down 14			Healthy 21
i About	<b>—</b>	$\sim$	<u> </u>	
? Help	Last Changed: 4 hours	Last Changed: 2	3 hours Last C	hanged: 4 hours
Updates		View All Devi	ces	
	Device Locations	A	All Devices	68
	Dovice Edulions			
	> T Bogusita Region	32	CONVERGE® Pro 2 128TD	5

ClearOne.									
OVERVIEW	CONVERGEN	CE™ ENTERP	RISE AV MA	NAGER					
n Dashboard	Acme, Inc	. Pro Aud	lio					Richard Rope	r ~
Servers	,								
🛓 Users	Discovered Dev	vices					68 Total	, 25 Visible, 0 Se	lecte
History	Q Search Visible	Columns			Search	🕈 Show All 🗸		· + * ·	0
Ø Settings									
DEVICES	Status 👻	Product Model	Name	Serial #	Connections	Location	Firmware	Access IP	
Pro Audio     Collaborate® Space     Communications	Healthy 4 hours	CONVERGE® Pro 2 128VD	128VD_1	2469- 1719- 08	Server AppsTesting200 > Subnet 10.101.200.0 (eth4) > Stack CV120128VD > C-Link 01	Forkus Region > Application Testing	8.4.8.0	10.101.200.203	
JPPORT About	Healthy 4 hours	CONVERGE® Pro 2 120	120_1	0175- 1708- 06	Server AppsTesting200 > Subnet 10.101.200.0 (eth4) > Stack CV120128VD > C-Link 00	Forkus Region > Application Testing	8.4.8.0	10.101.200.203	
? Help ØF Updates	Healthy 4 hours	CONVERGE® Pro 2 128TD	128TD_1	0462- 1708- 06	Server AppsTesting200 > Subnet 10.101.200.0 (eth4) > Stack CV128TDCT012 > C-Link 00	Forkus Region > Application Testing	8.4.8.0	10.101.200.204	

You will also see the devices summarized and listed in the same views of the Local Agent. However, you need not concern yourself with it any further and may sign out of it.

It's time to learn more about what you can and should do right away with CONVERGENCE and ClearOne Pro Audio devices. To start, in the navigation bar under SUPPORT, click Help.



Search your accessible Help pages from the field at the top of the navigation bar. Help documentation is dynamic according to the AV Manager and User Role you are in. Currently you should be in the Enterprise Owner Help, which shows pages for all user roles in the Organization. Each Help page shows its scope according to the above contextual parameters.

3.	Monitoring ClearOne Devices				
	CONVERGENCE™ AV Managers:	All			
	Cloud Organizations:	Support, Client			
	Roles:	All			

To better understand how to use CONVERGENCE to ensure your entire ClearOne system is secure, ready, and up to date, use the information in the following table:

Торіс	Help Page
Device status and monitoring devices	MONITOR > Monitoring ClearOne Devices
	MONITOR > Monitoring Servers
Initial settings, preventing and resolving issues	ADMINISTRATOR > Useful Links
Add more Pro Audio devices from other subnets on the premises of the Local Agent server	ADMINISTRATOR > Managing Servers > Adding a Pro Audio Subnet
Select devices to edit their data or control them	ADMINISTRATOR > Editing Device Data > Editing General Device Data > Selecting Devices

Торіс	Help Page				
Secure Pro Audio devices and their configurations	ADMINISTRATOR > Editing Device Data > Editing General Device Data > Changing a Device's Username and Password				
	ADMINISTRATOR > Controlling Devices > Pro Audio Devices > Backing Up Device Configuration				
	ADMINISTRATOR > Controlling Devices > Enabling and Disabling File Transfer Protocol (FTP)				
Identify where your devices are located so you'll know where to send a technician if there are	MONITOR > Monitoring ClearOne Devices > Interactive Dashboard Operation > Device Locations Tree Table				
issues, etc.	ADMINISTRATOR > Editing Device Data > Managing Device Locations				
	ADMINISTRATOR > Controlling Devices > Pro Audio Devices > Toggling Device Locate Light				
Get your devices up to date with new firmware	MONITOR > Monitoring ClearOne Devices > Updates > Firmware Update Badges				
	ADMINISTRATOR > Controlling Devices > Pro Audio Devices > Backing Up Device Configuration				
	ADMINISTRATOR > Controlling Devices > General Device Control > Updating Firmware				
	ADMINISTRATOR > Controlling Devices > Pro Audio Devices > Restoring Device Configuration				
Remotely update configuration of	a. Select the device or stack in DEVICES > Pro Audio.				
a Pro Audio device or a stack	b. Using the Download tool, choose Device Configuration.				
	c. Make the changes to the downloaded project file using Console AI.				
	<ul> <li>In Device Tools, above the Pro Audio device list, choose Load Configuration. (See ADMINISTRATOR &gt; Controlling Devices &gt; Pro Audio Devices &gt; Loading Device Configuration.)</li> </ul>				

To learn about setting up your Video Collaboration devices, see Step 8 on the next page.

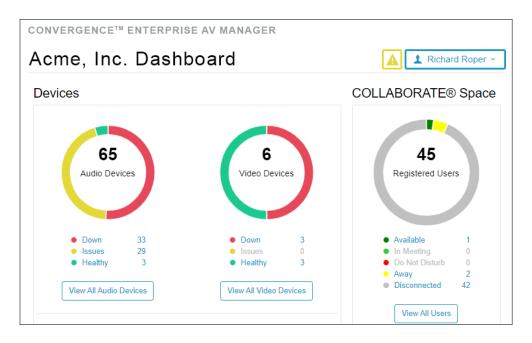
# Step 8. Set Up COLLABORATE Space Communications

Use COLLABORATE Space (CS) to integrate COLLABORATE Live (CL) video codecs with supported CONVERGE Pro Audio devices in the CONVERGENCE Dashboard. Also administer CS directly from it and other views in CONVERGENCE. Bring CS communications right into CONVERGENCE to facilitate your support communications.

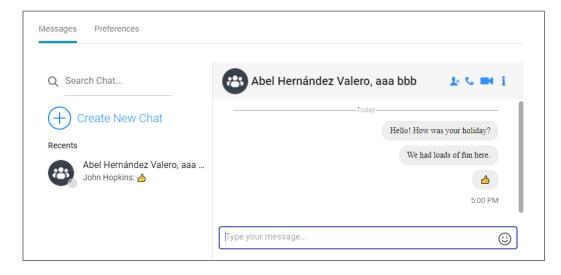
To accomplish all this, complete the following steps:

-	Action	Instructions
a.	Get a CS Web account for your organization.	COLLABORATE Space Plans
b.	Set up your CS Web account management for your organization.	COLLABORATE Space Administrator Manual (This document refers to CL devices as Resources).
с.	Download and install COLLABORATE Space on your computer or mobile device.	https://collaboratespace.net/#/ download
d.	Connect your CONVERGENCE account to your CS account.	CONVERGENCE Help > MONITOR > Managing My Account > Linking to COLLABORATE Space Administrator
e.	Use CS communications to support AV users from within CONVERGENCE.	CONVERGENCE Help > MONITOR > Communications
f.	Set up and register COLLABORATE Live video codecs with CS.	COLLABORATE Live 300 User Guide COLLABORATE Live 600 User Guide

After setting up your CS account, CL video codecs, and connecting your CONVERGENCE (CX) account to your CS account, your CX Dashboard will look something like the following:



Also in the Communications view, if your CS organization has your AV users in it, you can chat with them right from within CX.



With CS installed on your machine, you can use the handy icon buttons in the Communications view of CONVERGENCE for audio and video calls with these users.

