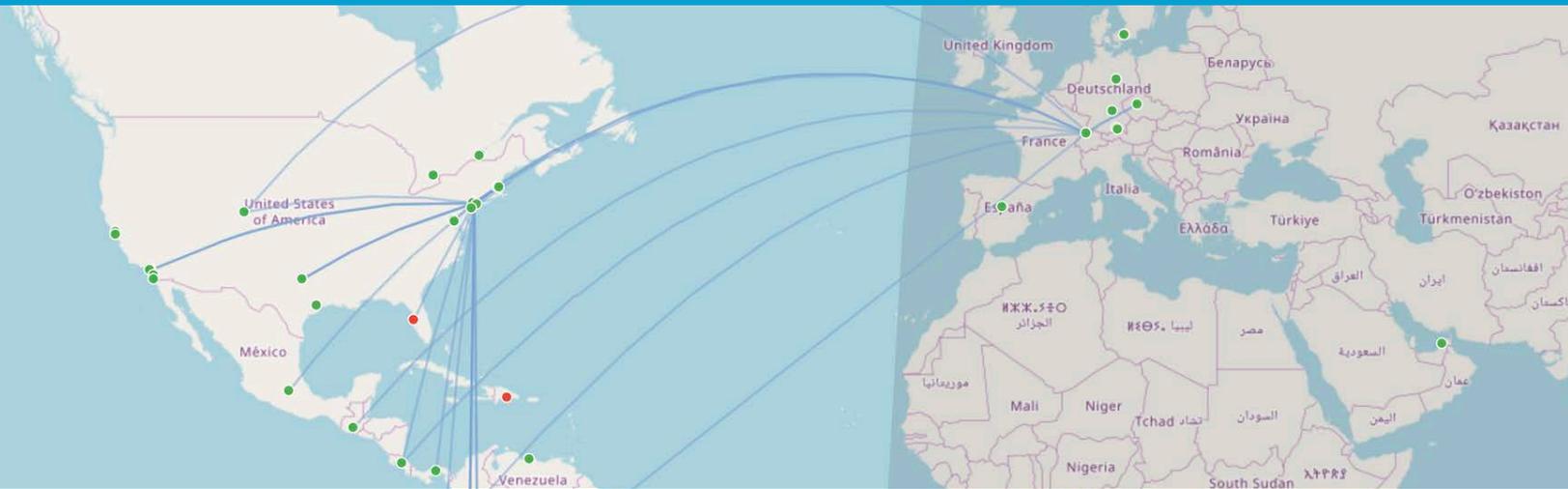




SYMPHONY

UNIFY ME

Device Registration Portal User Guide



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About this Guide

This guide describes the processes and procedures to use the AVI-SPL Device Registration portal to register your locations (Sites and Rooms within Sites) and devices for use with the AVI-SPL Symphony platform.

System Requirements

The Device Registration portal supports the following web browsers:

- ◆ Internet Explorer: Version 10 and Version 11
- ◆ Firefox: Version 31.0 and above
- ◆ Google Chrome
- ◆ Safari: Version 4 and Version 5
- ◆ Microsoft Edge

The portal can be accessed from any device with any operating system that supports one of these web browsers.

CHAPTER 1. GETTING STARTED

Symphony is a meeting solution monitoring, management, and analytics platform that allows you to connect and conduct your meetings for workstream harmony.

With the Device Registration portal, you can define and register the Sites (Locations), Rooms, and Devices your company will use with Symphony.

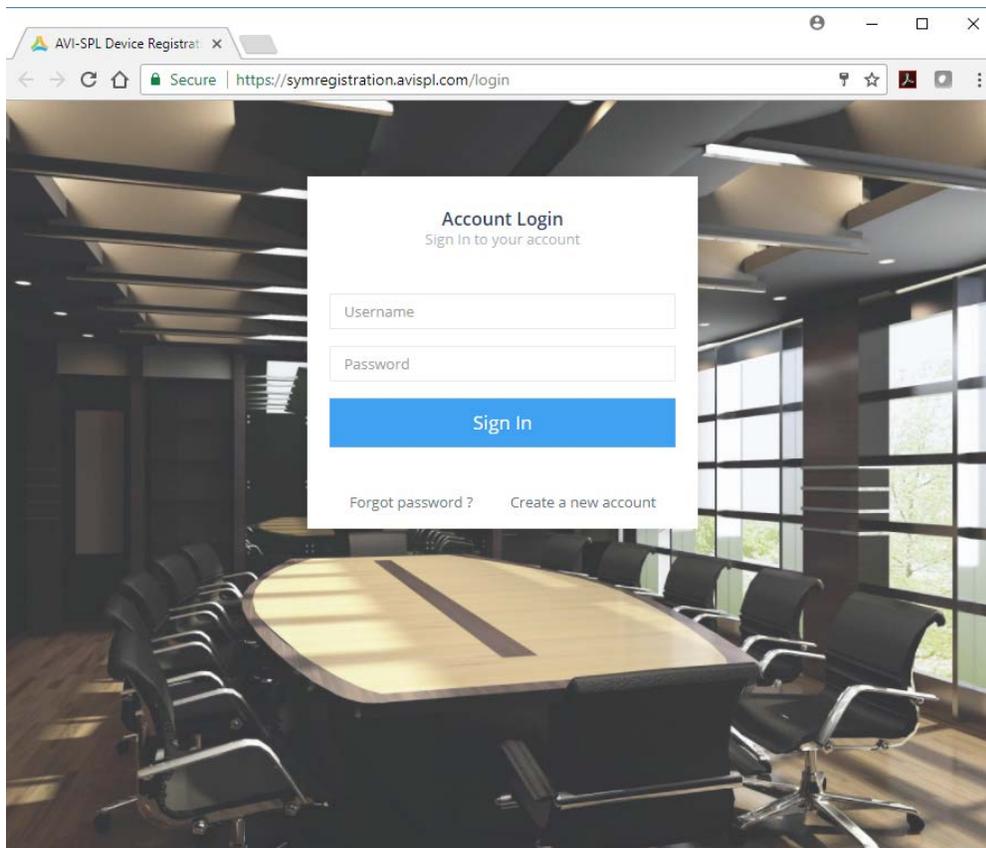
Accessing the Portal

When your Device Registration portal account is set up, you will receive an email with the URL to access the portal and your username and password to log in.

To log in to the portal

- 1 Navigate to the Symphony Device Registration portal URL in a web browser:
<https://symregistration.avispl.com/>

The Account Login page opens.

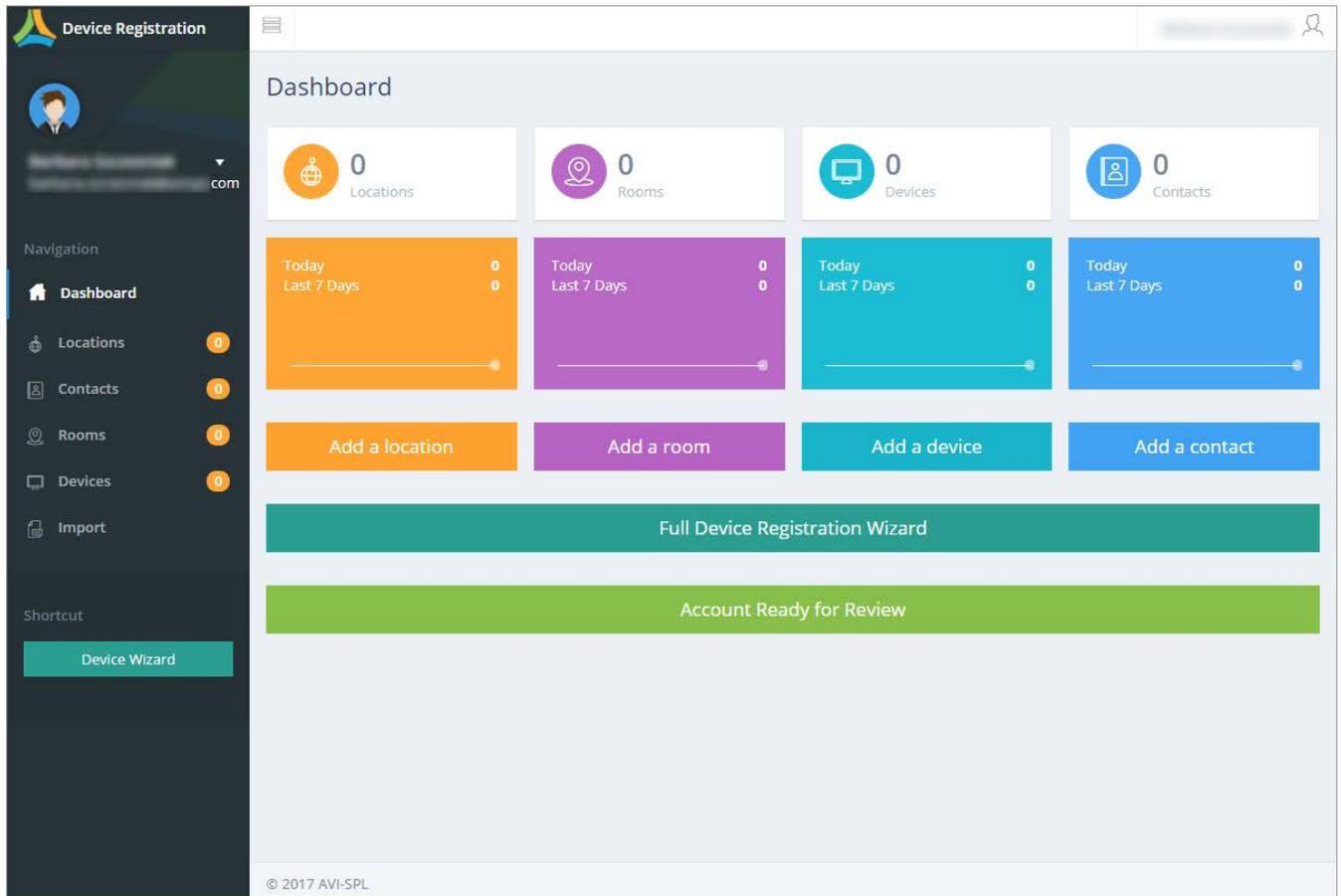


- 2 Enter your Username and Password.

NOTE If you have forgotten your password, select the **Forgot password** link to create a new password.

3 Click **Sign In**.

The portal displays the **Dashboard** page.



The left navigation area of the portal provides links to access other pages. The numbers beside each link show the total number of that type of element defined for your account.

Dashboard Overview

The Dashboard displays a summary of the **Locations**, **Rooms**, **Devices**, and **Contacts** defined for your account.

A Location represents a unique physical location street address, building, and city/state or country and contains (is the parent record for) one or more Rooms. A Room can contain one or more Devices (audio, visual, projector, etc.). When adding a Room, you must specify its Location; when adding a Device, you must specify its Room.

Each Room is assigned a Contact, which is the person to contact when there is an issue with a Device in the Room. Since Contacts are simply associated with Rooms (not dependent on them), you can create Contacts independently of Locations, Rooms, and Devices.

CHAPTER 2. ADDING ELEMENTS

This chapter describes how to manually add Locations, Rooms, and Devices separately or using the Wizard. You can add Contacts separately or while adding a Room.

NOTE For information on importing elements from a spreadsheet, see [Importing Data to the Portal](#).

The Dashboard page provides buttons to add each type element. You can also open the page for a type of element using the links in the left navigation area and add a new element of that type from that page.

Once you add a Location, you can add a Room and specify that it is in that Location. Once you add a Room, you can add a Device and specify that it is in that Room.

You can also use the **Device Wizard** to create a Location, a Room within the Location, and a Device within the Room.

Adding a Location

If you will be adding multiple Rooms to a Location, you can add the Location on its own.

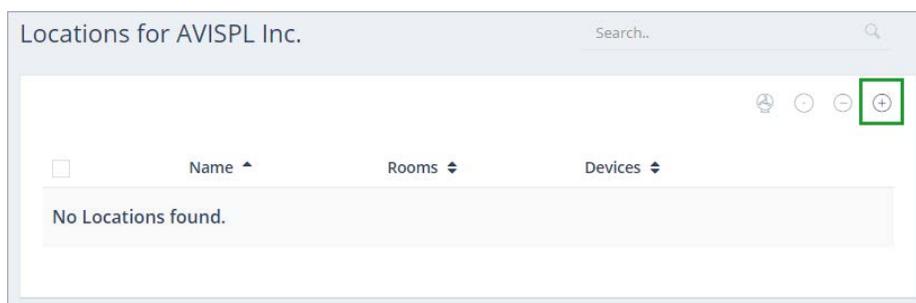
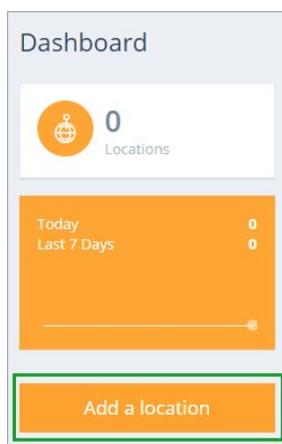
When adding Locations, apply the following guidelines:

- ◆ Set-up one Location per unique street address.
- ◆ Set-up two (or more) Locations if the street address is the same, but has a different building number—one Location for each building number.

For example, enter **123 Anyplace Tower 1** and **123 Anyplace Tower 2** as two separate location records.

To add a Location

- 1 On the Dashboard page, click **Add a location**; alternatively, click the **Add Location** icon on the Locations page.



The New Location page opens.

New Location

Account **AVISPL Inc.**

Location Name *

Address *

City *

State/Province

Zip/Postal Code

Country *

Time Zone *

Site Phone

NOTE A red asterisk (*) indicates a required field.

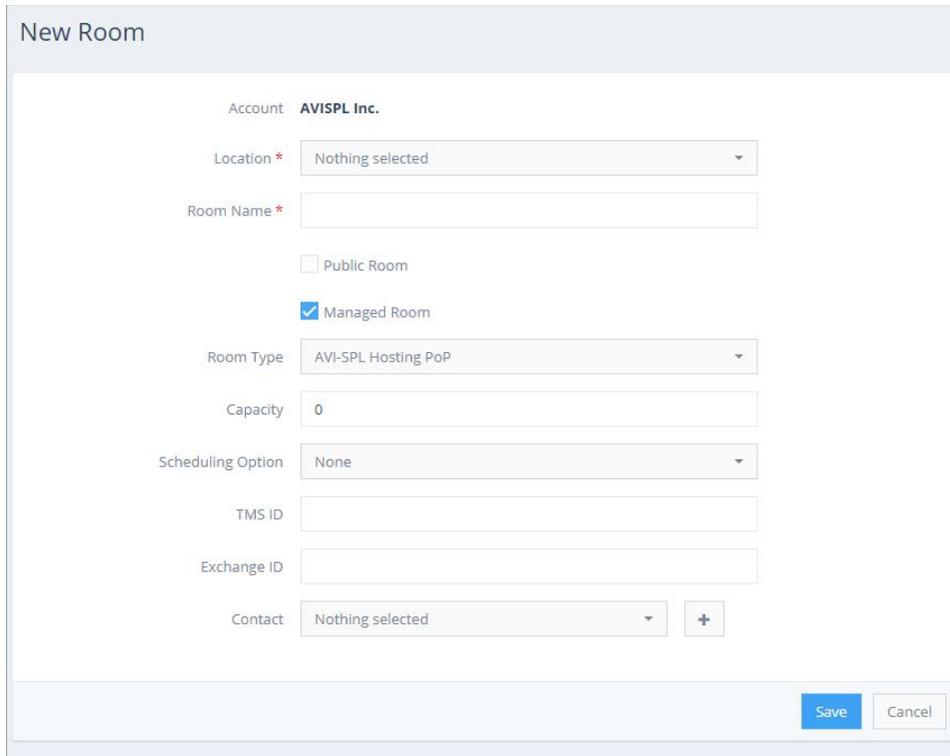
- 2 Complete the fields for the Location.
The **Location Name** is the name that will be used to identify the Location within Symphony. Use a name that will distinguish the Location from others for your account.
- 3 Click **Save** to add the Location to your account.
The number of Locations shown in the left navigation area and on the Dashboard is increased by 1.
You can click the link for the Location on the Locations page to edit it.

Adding a Room

If you will be adding multiple Devices to a Room, you can add the Room on its own. When adding the Room, you must specify the Location that contains it.

To add a Room

- 1 On the Dashboard page, click **Add a room**; alternatively, click the **Add room** icon on the Rooms page.
The New Room page opens.



When you add the Room from the Rooms page of a Location, the **Location** field is automatically set for you.

- 2 Select the Location that contains the Room in the **Location** list.
The list contains all Locations defined for your account.

- 3 Complete the remaining fields for the Room:

Room Name	Enter a name to identify the Room within Symphony. Use a name that will distinguish the Room from others for the Location.
Public Room	Select this check box if the Room is available for general use, rather than reserved for an individual (such as the CEO's office).
Managed Room	Select this check box if the Room and the Devices it contains will be managed by Symphony.
Room Type	Select the type of the Room (in most cases, you will select Conference Room).
Capacity	Enter the maximum number of people the Room can accommodate.
Scheduling Options	Select VC Scheduling (video conferencing), or Room Only Scheduling , or None .
TMS ID	If applicable, enter the TMS ID for the Room.
Exchange ID	If applicable, enter the Exchange ID for the Room.
Contact	Select the Contact to associate with the Room. If necessary, click the add button to add a new Contact (see Adding a Contact).

- 4 Click **Save** to add the Room to your account.

The number of Rooms shown in the left navigation area and on the Dashboard is increased by 1.
You can click the link for the Room on the Rooms page to edit it.

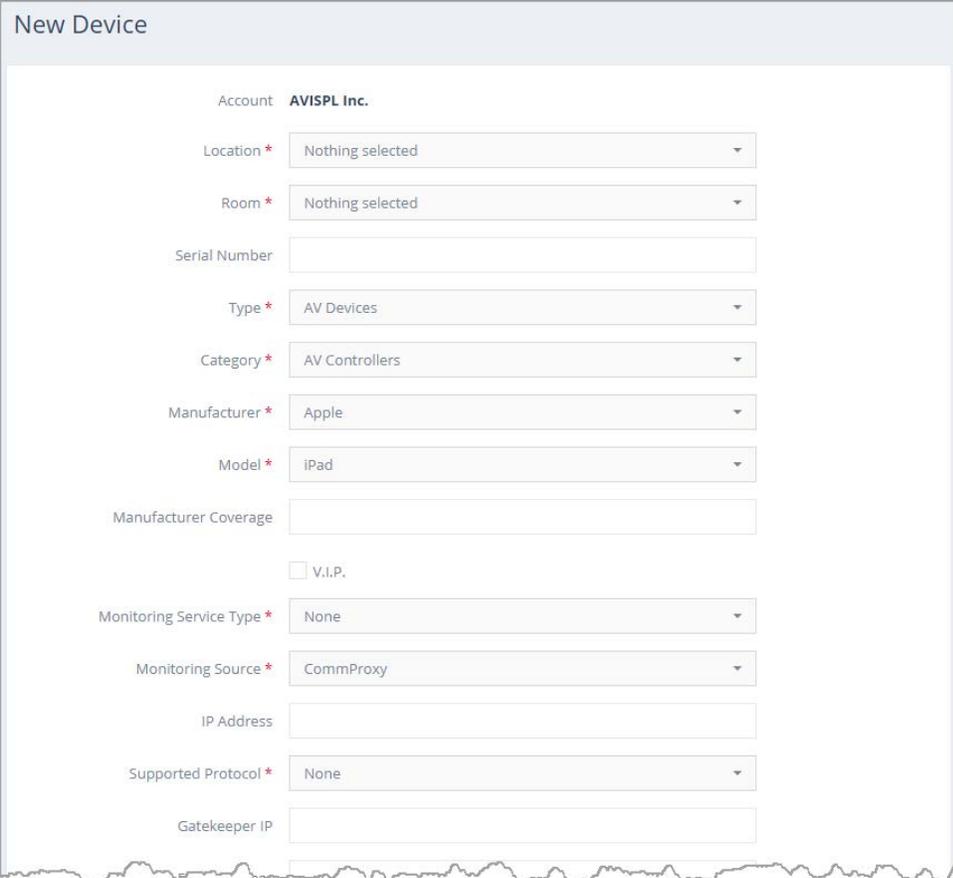
Adding a Device

If you will be adding multiple Devices to a Room, you can add each Device on its own. When adding the Device, you must specify the Location and Room that contain it.

To add a Device

- 1 On the Dashboard page, click **Add a device**; alternatively, click the **Add a device** icon on the Devices page.

The New Device page opens.



The screenshot shows the 'New Device' registration form. The form is titled 'New Device' and is set for the account 'AVISPL Inc.'. The form contains the following fields:

- Account: AVISPL Inc.
- Location *: Nothing selected (dropdown menu)
- Room *: Nothing selected (dropdown menu)
- Serial Number: (text input field)
- Type *: AV Devices (dropdown menu)
- Category *: AV Controllers (dropdown menu)
- Manufacturer *: Apple (dropdown menu)
- Model *: iPad (dropdown menu)
- Manufacturer Coverage: (text input field)
- V.I.P.
- Monitoring Service Type *: None (dropdown menu)
- Monitoring Source *: CommProxy (dropdown menu)
- IP Address: (text input field)
- Supported Protocol *: None (dropdown menu)
- Gatekeeper IP: (text input field)

When you add the Device from the Devices page of a Location or Room, the **Location** and **Room** fields are automatically set for you.

- 2 Select the Location that contains the Device in the **Location** list.
The list contains all Locations defined for your account.
- 3 Select the Room that contains the Device in the **Room** list.

The list contains all Rooms defined for the selected Location.

- 4 Complete the remaining fields for the Device.

Complete as much information as you can.

In the **Monitoring Service Type** list, select whether Symphony should monitor the Device, monitor and manage the Device, or neither (None).

In the **Monitoring Source** list, select the method Symphony should use to monitor the Device (in most cases, this will be CommProxy).

- 5 Click **Save** to add the Device to your account.

The number of Devices shown in the left navigation area and on the Dashboard is increased by 1.

You can click the link for the Device on the Devices page to edit it. The Device is identified in the list by the Manufacturer and Model.

Using the Device Wizard

You can use the **Device Wizard** to create a Location, a Room within the Location, and a Device within the Room in one step.

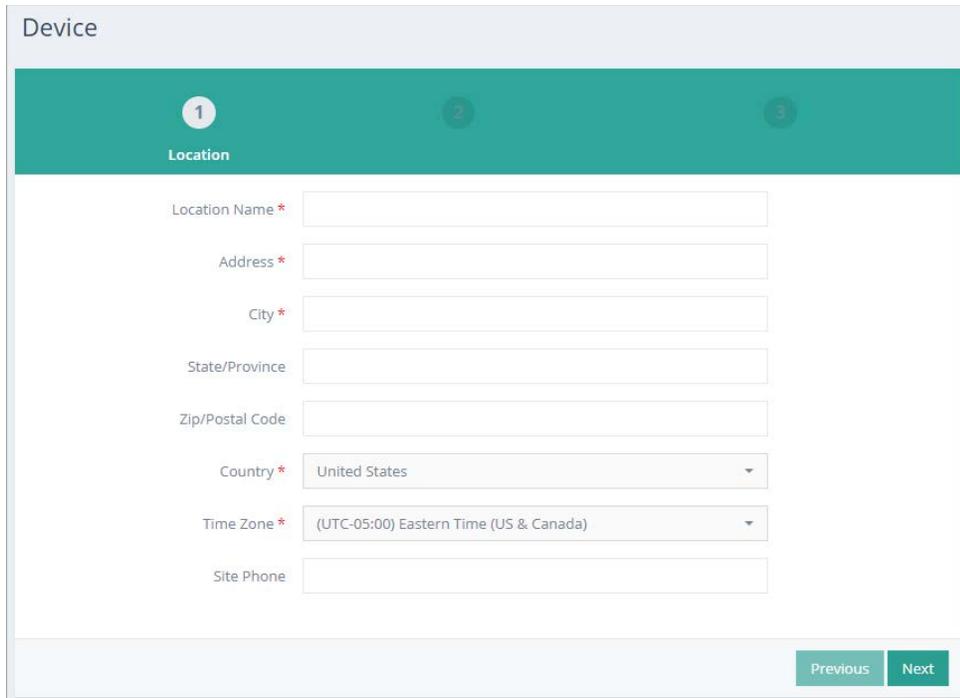
The wizard contains three pages: Location, Room, and Device, which mirror the individual pages described in the sections above. The main differences are:

- ◆ The Location for the Room and Device is automatically set to the Location you specify on the Location page.
- ◆ The Room for the Device is automatically set to the Room you specify on the Room page.
- ◆ The Location, Room, and Device are all not added to your account until you click **Finish** in the wizard.

To use the Device Wizard

- 1 On the Dashboard page, click **Full Device Registration Wizard**; alternatively, click the **Device Wizard** link in the left navigation area.

The Device wizard opens to the Location page.



Device

1 Location

Location Name *

Address *

City *

State/Province

Zip/Postal Code

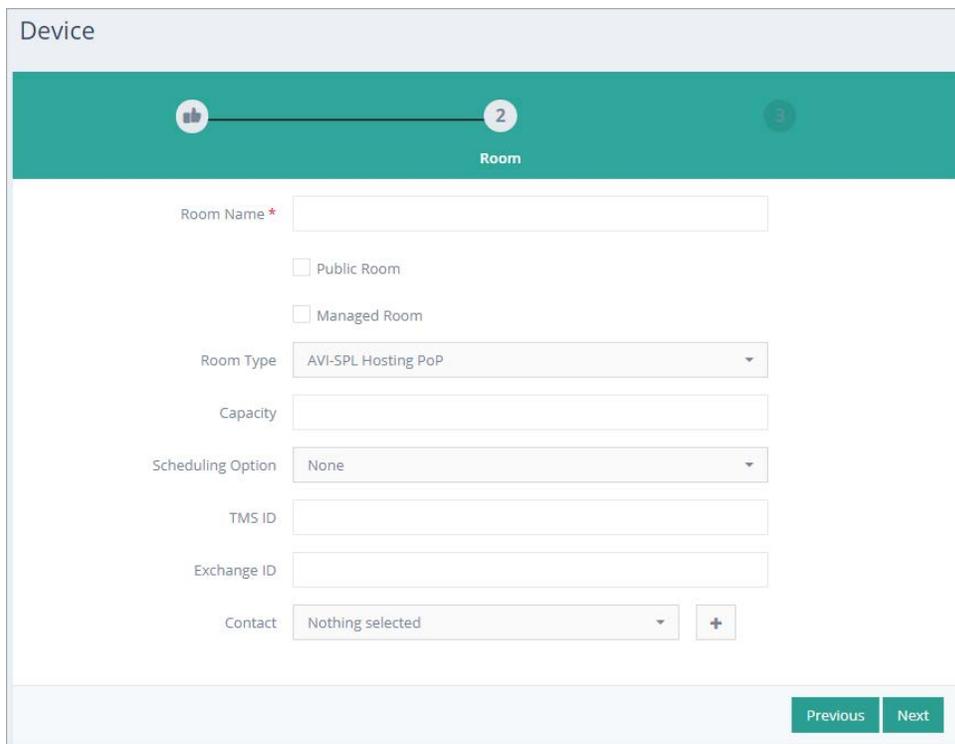
Country * United States

Time Zone * (UTC-05:00) Eastern Time (US & Canada)

Site Phone

Previous Next

- 2 Complete the fields for the Location (as described in [Adding a Location](#)).
- 3 Click **Next** to proceed to the Room page of the wizard.



Device

2 Room

Room Name *

Public Room

Managed Room

Room Type AVI-SPL Hosting PoP

Capacity

Scheduling Option None

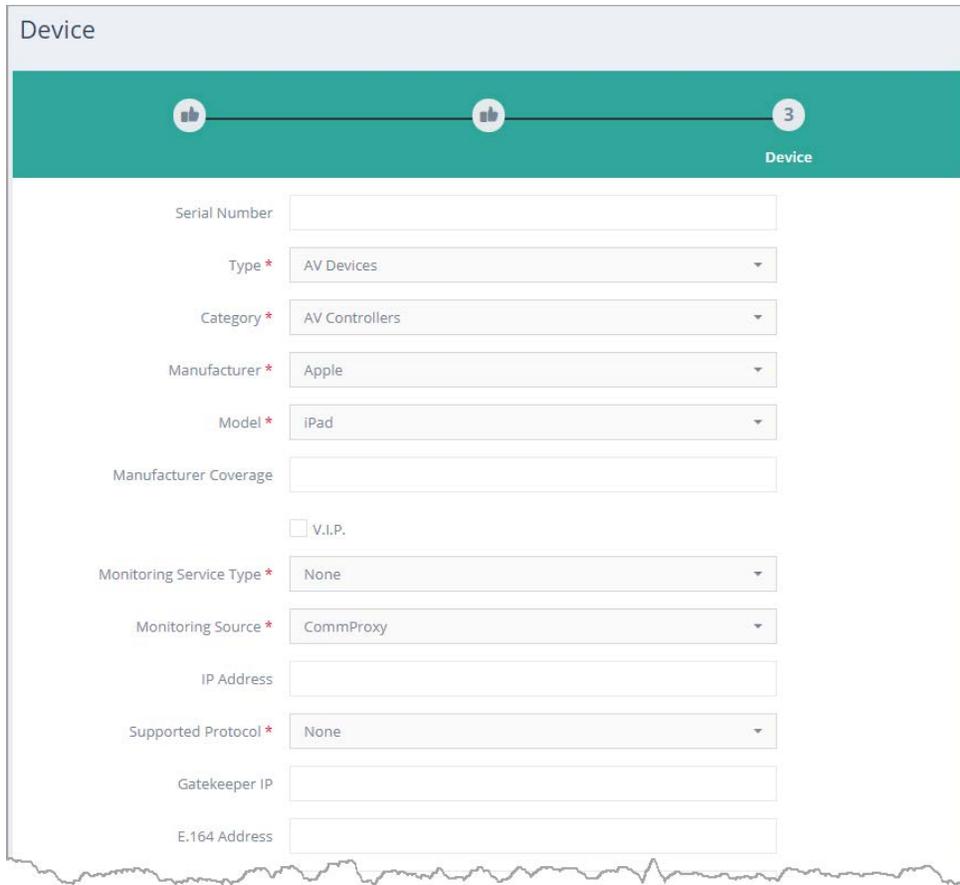
TMS ID

Exchange ID

Contact Nothing selected

Previous Next

- 4 Complete the fields for the Room (as described in [Adding a Room](#)).
- 5 Click **Next** to proceed to the Device page of the wizard.



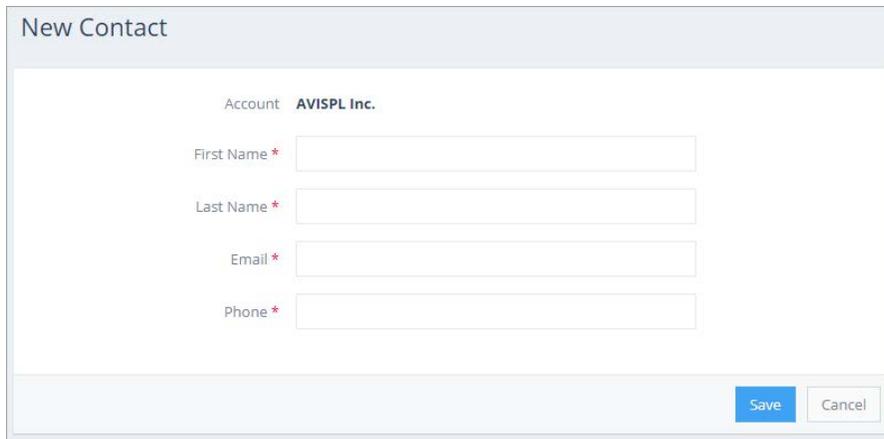
- 6 Click **Finish** to add the new Location, Room, and Device to your account.

Adding a Contact

You can add any number of Contacts for your account and associate a Contact with each Room.

To add a Contact

- 1 On the Dashboard page, click **Add a contact**; alternatively, click the **Add a contact** icon on the Contacts page.
The New Contact page opens.



- 2 Enter the information for the Contact—all fields are required.
- 3 Click **Save** to add the Contact to your account.
The number of Contacts shown in the left navigation area and on the Dashboard is increased by 1.
You can click the link for the Contact on the Contacts page to edit it.

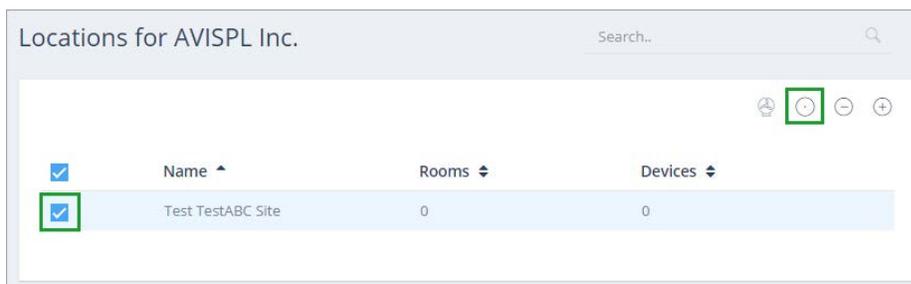
Adding an Element by Copying an Existing One

You can also add a Location, Room, or Device by copying an existing one and modifying it. Contacts cannot be created by copying.

NOTE *The figures below illustrate how to perform this procedure for a **Location**. The screens for copying a **Room** or **Device** are similar.*

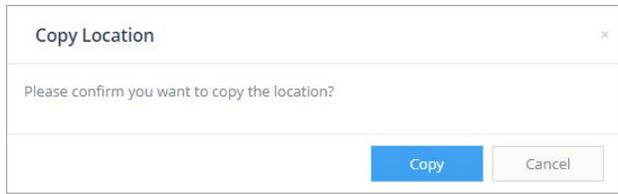
To create an element from an existing element

- 1 Open the page for the type of element you want to create.



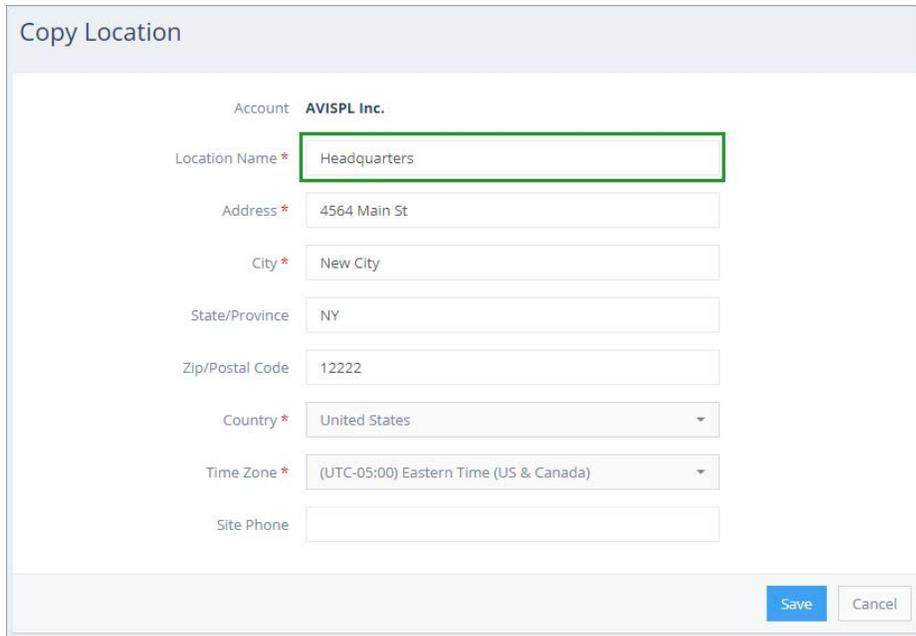
<input checked="" type="checkbox"/>	Name ^	Rooms ^	Devices ^
<input checked="" type="checkbox"/>	Test TestABC Site	0	0

- 2 Select the check box for the item you want to copy.
- 3 Click the **Copy** icon in the top right.
You are prompted to confirm the copy.



A dialog box titled "Copy Location" with a close button (X) in the top right corner. The text inside reads "Please confirm you want to copy the location?". At the bottom, there are two buttons: "Copy" (highlighted in blue) and "Cancel".

- 4 Click **Copy** to open the Copy page.
The page displays all the fields as set in the original element.



A form titled "Copy Location" for the account "AVISPL Inc.". The form contains the following fields:

- Location Name *: Headquarters (highlighted with a green border)
- Address *: 4564 Main St
- City *: New City
- State/Province: NY
- Zip/Postal Code: 12222
- Country *: United States (dropdown menu)
- Time Zone *: (UTC-05:00) Eastern Time (US & Canada) (dropdown menu)
- Site Phone: (empty text box)

At the bottom right of the form are "Save" (highlighted in blue) and "Cancel" buttons.

- 5 Change the fields as necessary for the new element.
For a Location, you should change at least the **Location Name** so that you do not have two Locations with the same name.
For a Room, you cannot change the Location. As with Locations, you should change at least the **Room Name** to distinguish between Rooms.
For a Device, you cannot change the Location or Room. Be sure to change the **Serial Number** and all other relevant information for the new Device.
- 6 Click **Save** to create the new element.

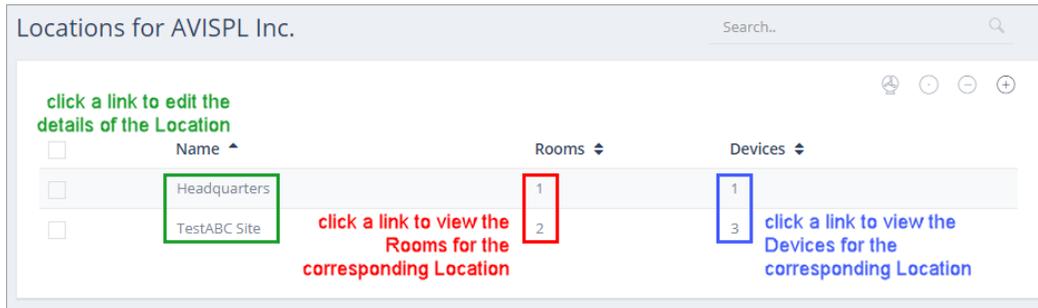
Reviewing and Modifying Locations, Rooms, and Devices

After you add Locations, Rooms, and Devices you can view the summary information and access details from the corresponding page in the Device Registration portal.

NOTE *The steps below describe how to review and modify information for a **Location**. The steps for **Rooms** and **Devices** are similar.*

To view and drill down into information for a Location

- 1 Click the **Locations** link in the left navigation area to view all Locations for your account.



The page shows the number of Rooms and Devices for each Location.

- 2 Click the link in the **Name** column to open the details of the Location and edit them.
- 3 Click the link in the **Rooms** column to open the Rooms page for the Location.

On this page, you can:

- ◆ View the summary information for the Rooms
- ◆ Add a Room to the Location
- ◆ Open the details of a Room and edit them
- ◆ Drill down to see the Devices for a Room.

- 4 Click the link in the **Devices** column to open the Devices page for the Location.

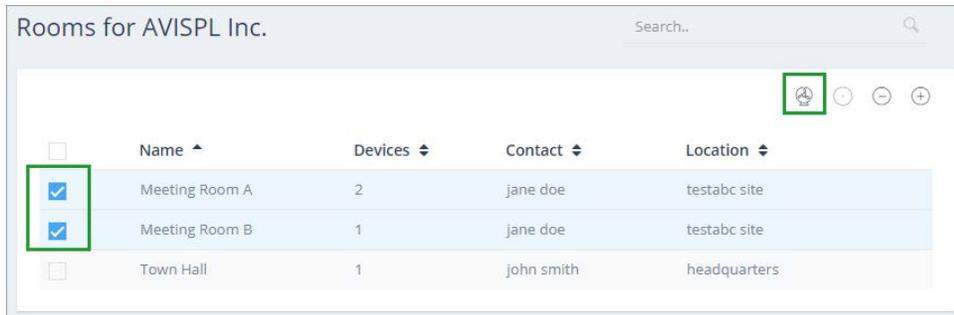
On this page, you can:

- ◆ View the summary information for the Devices
- ◆ Add a Device to the Location
- ◆ Open the details of a Device and edit them

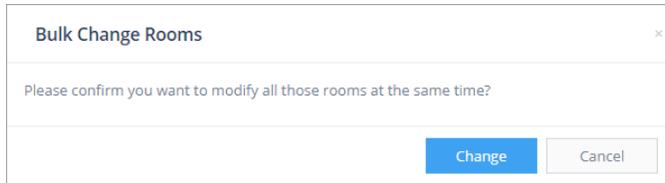
On the Locations, Rooms, or Devices page, you can also use the **Bulk Changes** feature to change the attributes for multiple elements at the same time [for example, to change the **Contact** associated with multiple Rooms (illustrated in the steps below) or the **Monitoring Service Type** for several Devices].

To bulk edit the attributes of multiple elements

- 1 Open the desired page.

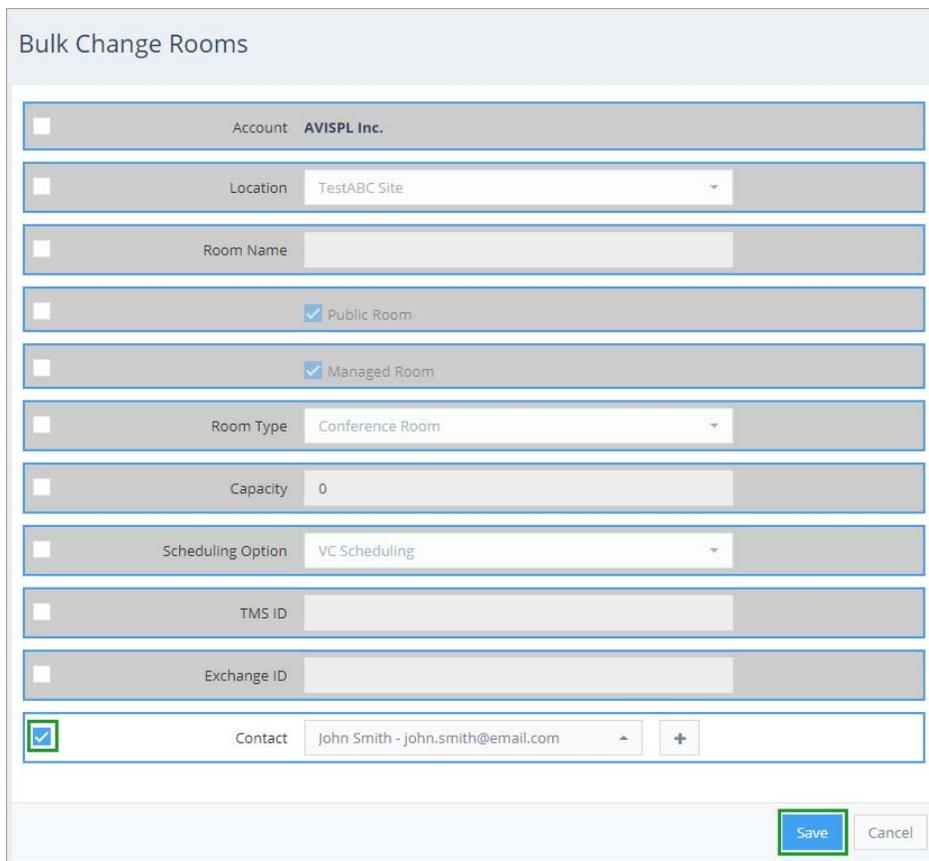


- 2 Select the check box for each of the items you want to modify.
- 3 Click the **Bulk Changes** icon in the top right.
You are prompted to confirm the changes.



A dialog box titled "Bulk Change Rooms" with a close button (x) in the top right corner. The text inside reads: "Please confirm you want to modify all those rooms at the same time?". At the bottom, there are two buttons: "Change" (highlighted in blue) and "Cancel".

- 4 Click **Change** to continue to the Bulk Change page.
The page shows all fields where the data is the same for all selected items. Fields where the data is different or no data is set are blank.



The "Bulk Change Rooms" main form displays a list of fields for modification. Each field has a checkbox on the left. The fields and their current values are:

- Account: AVISPL Inc.
- Location: TestABC Site
- Room Name: (blank)
- Public Room:
- Managed Room:
- Room Type: Conference Room
- Capacity: 0
- Scheduling Option: VC Scheduling
- TMS ID: (blank)
- Exchange ID: (blank)
- Contact: John Smith - john.smith@email.com (with a plus sign to add a new contact)

At the bottom right, there are "Save" and "Cancel" buttons. The "Save" button is highlighted with a green box.

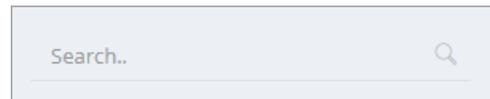
- 5 For each field you want to change, select the check box for and select or enter a new value.
Note that you can add a Contact when changing the **Contact** field for Rooms.
- 6 After modifying all fields, click **Save** to update all the items.

If the Locations, Rooms, Devices, or Contacts page contains many items, you can use the **Search** feature to limit the items displayed on the page. The columns the portal searches for the text depend on what type of element you are searching on.

Element Type	Portal searches for text in...
Locations	Name
Rooms	Name
Devices	Name, Type, Category, Manufacturer, Model
Contacts	Name, Email, Phone

To search for items on a page

- 1 Enter text in the **Search** field.
- 2 Press ENTER or click the **search** icon.



To redisplay all items

- 1 Clear the text from the **Search** field.
- 2 Press ENTER or click the **search** icon.

Submitting the Data for Review

After you have added or imported all your Locations, Rooms, Devices, and Contacts, you can submit the data for review AVI-SPL.

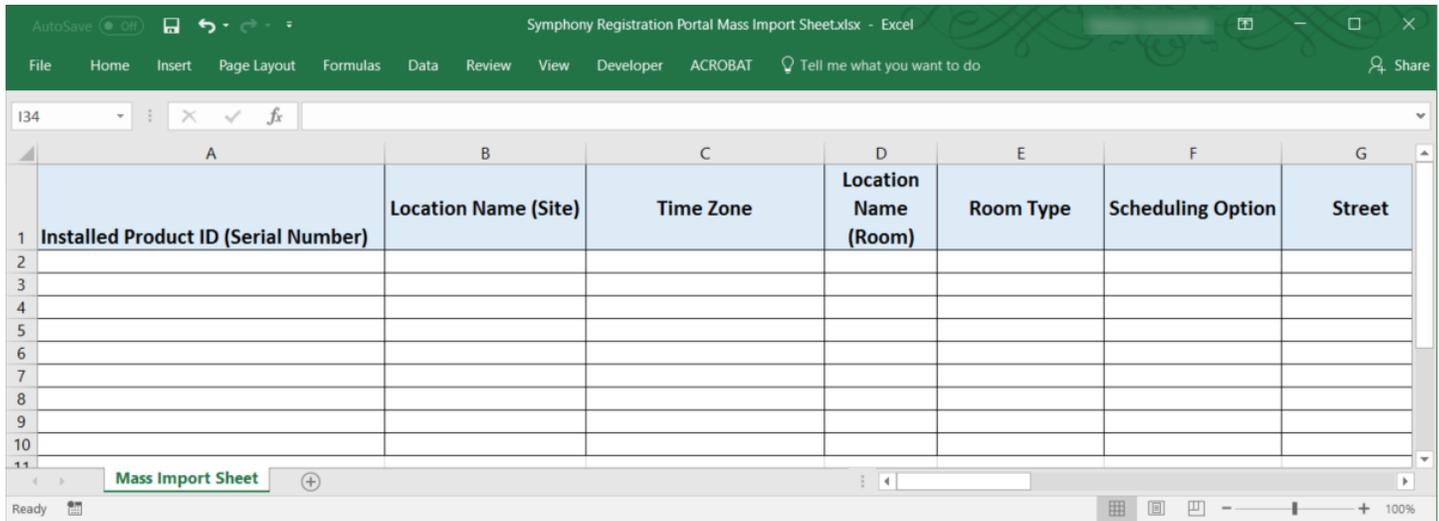
To submit your account for review

- 1 On the Dashboard page, click **Account Ready for Review**.
You are prompted to confirm that you want to submit your data for review.
- 2 Click **OK** to confirm.
The **Account Ready for Review** button changes to **Wait for Review**.

AVI-SPL reviews your information. A member of the team will contact you if further information is needed.

CHAPTER 3. IMPORTING DATA TO THE PORTAL

If you have many devices to add for your company, you can enter all the data in a DLR spreadsheet and import it to the portal. The AVI-SPL associate you are working with can provide you with a blank spreadsheet with the appropriate format to use.



Creating the Import File

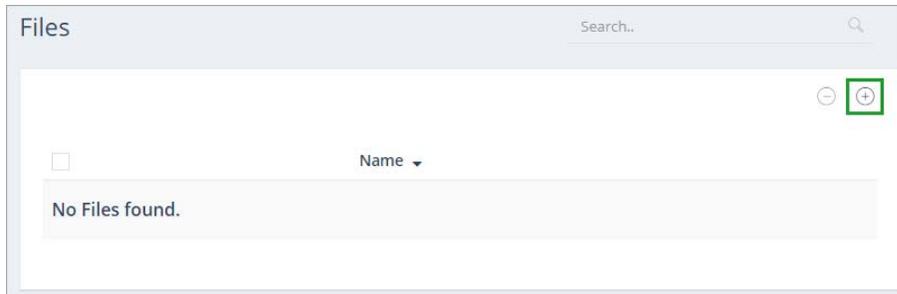
Complete a row in the spreadsheet for each device. Each row contains Location, Room, and Contact information, which you can copy for each device using the same Location and/or Room. When the portal imports the spreadsheet, it will create:

- ◆ A Location for each row where the Location information is different
- ◆ A Room for each row where the Room information differs or the Room information is the same, but the Location differs
- ◆ A Contact for each row where the contact information differs
- ◆ A Device for each row

Importing the File

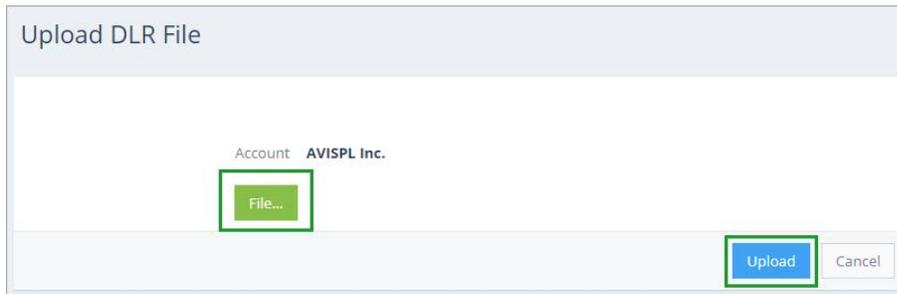
To import the file

- 1 Click the **Import** link in the left navigation area to open the Files page.



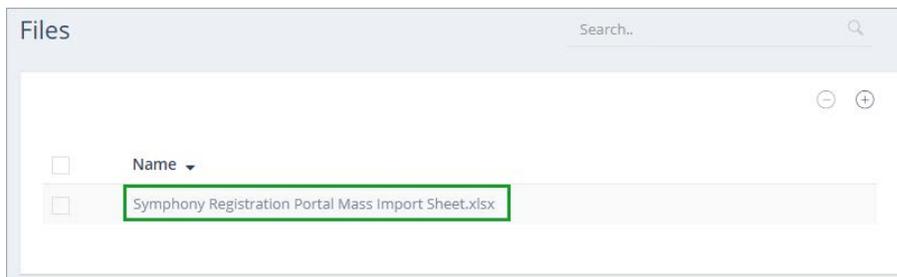
If you have previously imported files, they are listed on this page.

- 2 Click the **Add File** icon to open the Upload DLR File page.



- 3 Click **File** to navigate to and select the spreadsheet file to upload.
- 4 Click **Upload** to upload the file to the portal.

The file is now listed on the Files page.

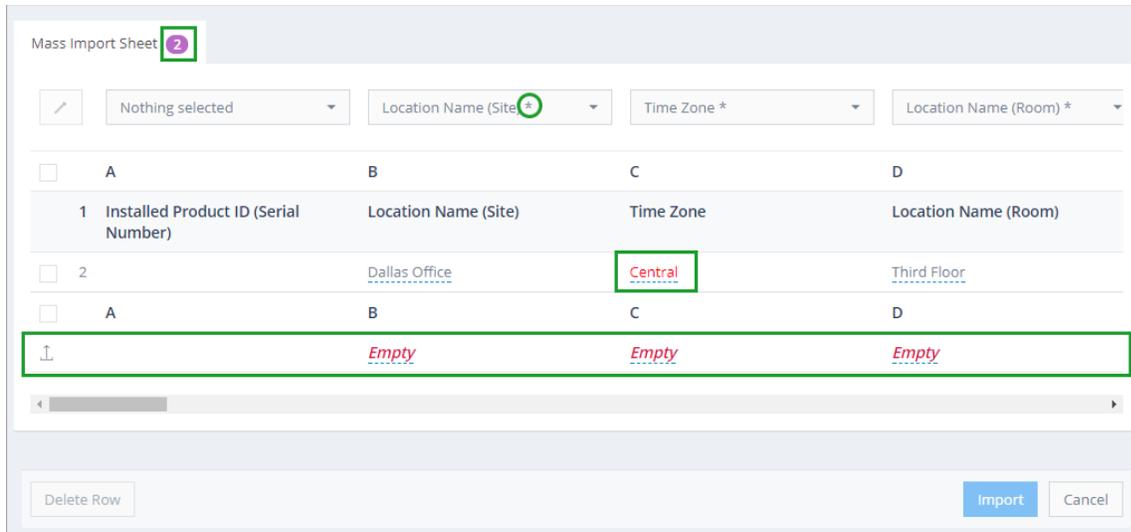


Verifying the Uploaded File

After uploading the file, you must verify the data before importing it to the portal.

To verify and finalize the data for import

- 1 Click the link in the **Name** column on the Files page to open the Mass Import Sheet.



The number on the tab at the top indicates the number of rows from the imported file.

The row across the top shows what fields are contained in each column. An asterisk indicates that the column is required.

Row 1 contains the column headings from the spreadsheet.

Each row of data is included under the headings, starting with row 2. **Red text** indicates an issue with the data that you need to correct before you can import it. For example, in the illustration above, **Central** is not the official value for the **Time Zone**.

The bottom row is the **Bulk Edit** row. You can select the check box for one or more rows, and then select the value to set for all of them in the column in this row.

2 Scan through the data and correct any fields.

For example:

- a Click **Central** in the **Time Zone** column in row 2 to open the **Enter Time Zone** control.



- b Select the appropriate value from the list.
- c Click the check mark to set the value.

Mass Import Sheet 2

Nothing selected | Location Name (Site) * | Time Zone * | Location Name (Room) *

	A	B	C	D	
<input type="checkbox"/>	1	Installed Product ID (Serial Number)	Location Name (Site)	Time Zone	Location Name (Room)
<input type="checkbox"/>	2		Dallas Office	(UTC-06:00) Central Time (US & Canada)	Third Floor
<input type="checkbox"/>	A	B	C	D	
		Empty	Empty	Empty	

Delete Row | Import | Cancel

- After correcting all the data, select the top check box to select all rows and click **Import** to import the data to the portal.