

CONVERGENCE™ Cloud AV Manager



ClearOne® Contacts

Headquarters

5225 Wiley Post Way Suite 500
Salt Lake City, UT 84116

Sales

Tel: +1.801.975.7200
sales@clearone.com

Headquarters

Tel: +1.801.975-7200

Technical Support

Tel: +1.801.974.3760
audiotechsupport@clearone.com

Notices

© 2021 ClearOne, Inc. ClearOne, Inc. All rights reserved.

Information in this document is subject to change without notice.

Document: QSG-0135-001v1.5 August 2021

Contents

About CONVERGENCE Cloud AV Manager	1
Step 1. Get an Account	2
Step 2. Set Up Your Account	5
Step 3. Add Users	7
Step 4. Add a Client Account	9
Step 5. Add a Client Local Server	13
Step 6. Set Up Local Servers.....	15
Step 7. Set Up Your Devices.....	17
Step 8. Set Up COLLABORATE Space Communications.....	20

About CONVERGENCE Cloud AV Manager

CONVERGENCE AV Manager software is a unified platform to monitor, control, and audit ClearOne Pro Audio and Video products and services from any location 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-1000-002-1 CONVERGENCE Cloud AV Manager

Step 1. Get an Account

- a. In your HTML browser, go to clearone.com/convergence-av-cloud and click the Get Free Trial button.



- b. Fill out the form that appears and then, at the bottom of the page, click Get Free Trial.

Great decision! You're on your way. We need the info set up your free trial account:

Expected total number of Pro Audio devices to be supported *

5

First Name * Last Name *

Richard Roper

Company name *

Acme

Email * Phone number *

Free email domains (Gmail, Yahoo, Zoho, etc) cannot be accepted 8013033352

richard.roper@clearone.com

Company website *

www.clearone.com

Country *

United States

State

UT

City

Salt Lake City

ZIP

84095

We are committed to protecting and respecting your privacy, please review our [Privacy Policy](#).

I agree to receive other communications from ClearOne.

By clicking submit below, you consent to allow ClearOne to store and process the personal information above to provide you the content requested.

protected by reCAPTCHA
[Privacy](#) - [Terms](#)

Get Free Trial

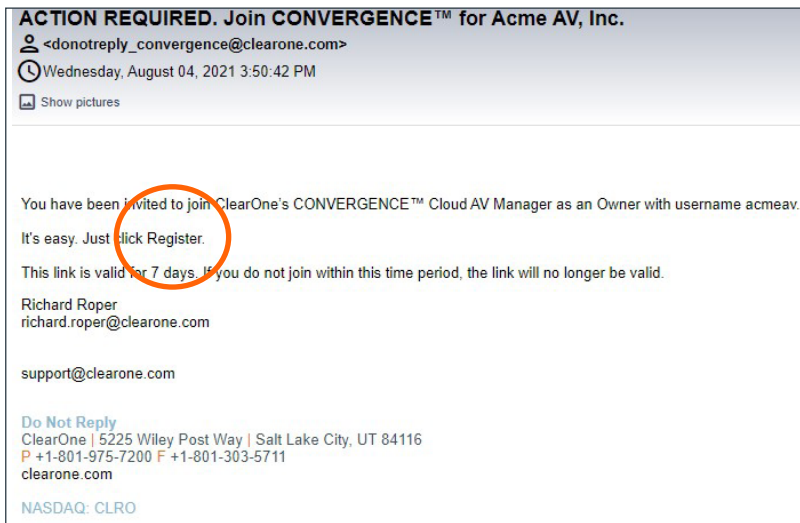
- c. The following message appears:

Thank you for registering.

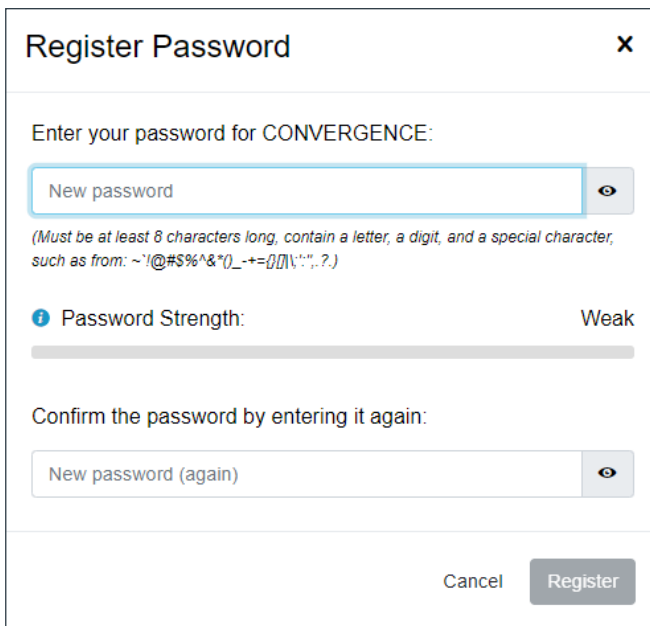
Your account is being created and we will contact you with access information within 24 hours.

For any questions, contact marketing@clearone.com or call +1 801 975 7200.

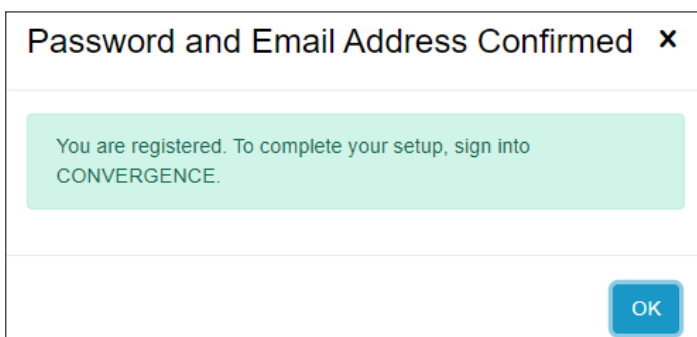
- d. When you receive your invitation email, click Register.



- e. On the Register Password screen, enter a password, and then click Register.



- f. On the confirmation screen, click OK.



- g. Enter your password, and then click Sign In.

ClearOne. A6 ▾

CONVERGENCE™ CLOUD AV MANAGER
Version 2.0.3.9

User Sign In

Username or Email Address:

Password:
 👁

Stay Signed In [Forgot your password?](#)

[Terms of Service](#) [Privacy Policy](#)

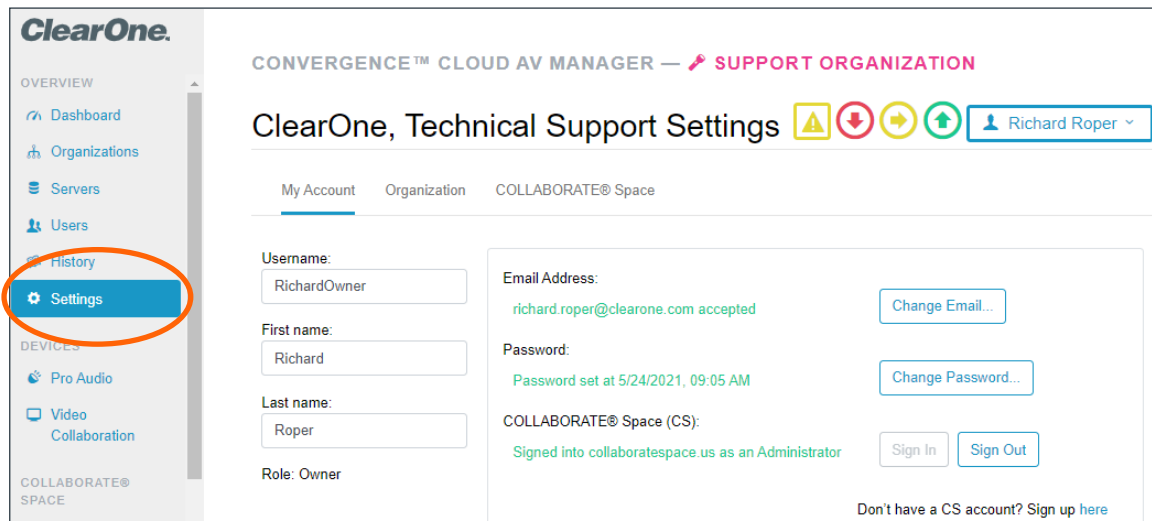
- h. Read the Terms of Use and the Privacy Policy, click the acceptance check boxes, then click Accepted.

Read and Accept Terms ✕

I accept the Terms of Use I accept the Privacy Policy

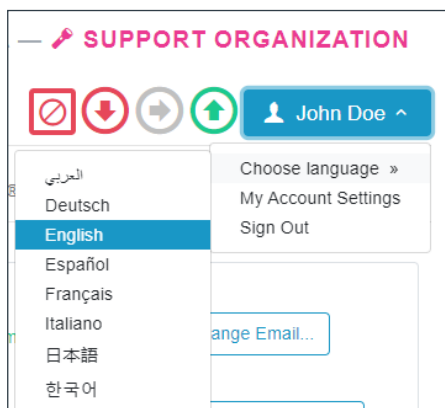
Step 2. Set Up Your Account

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



From any screen in the web app, do the following:

- a. In the upper right, use the dropdown to choose your preferred language (coming soon).

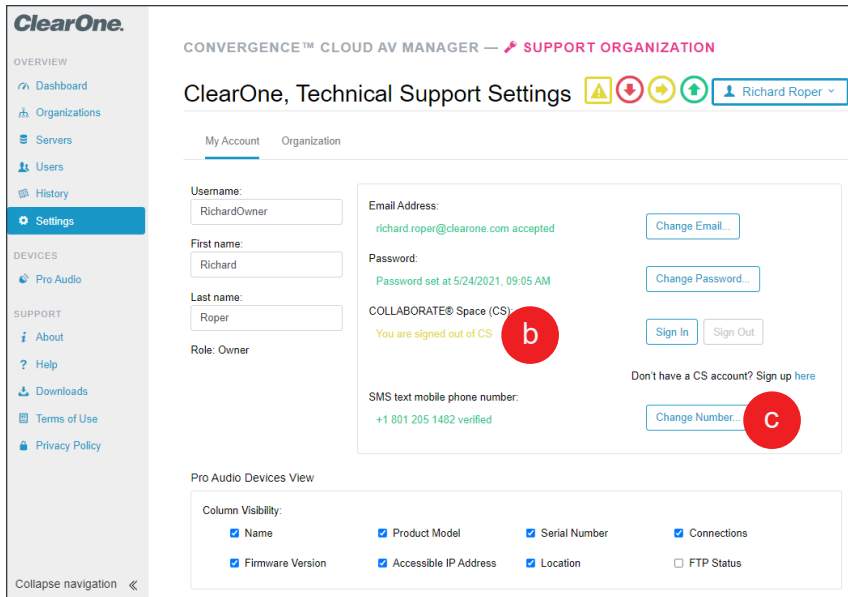


- b. Sign In to your collaboratespace.net account.

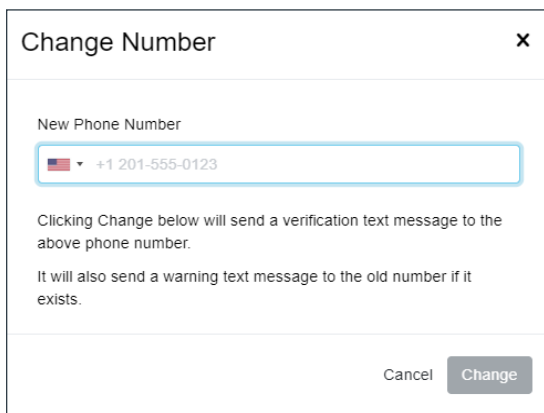


Note: If you do not yet have a COLLABORATE Space account, click the “Sign up here” link to get a free account.

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

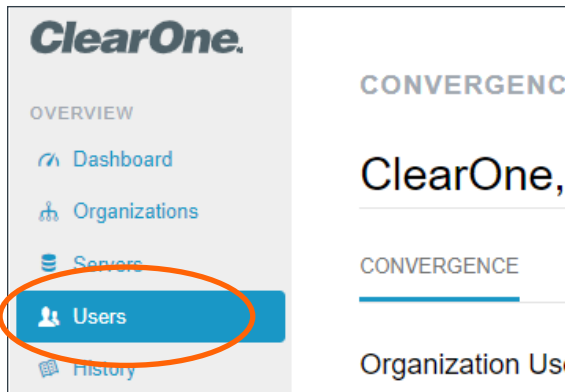


d. On the Change Number dialog window, enter the new phone number, then click Change.

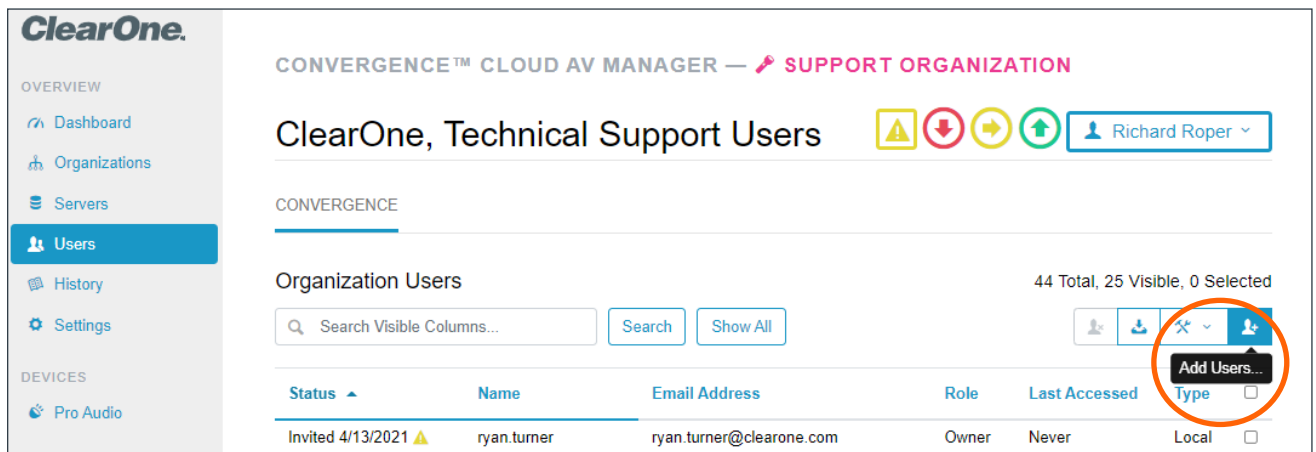


Step 3. Add Users

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



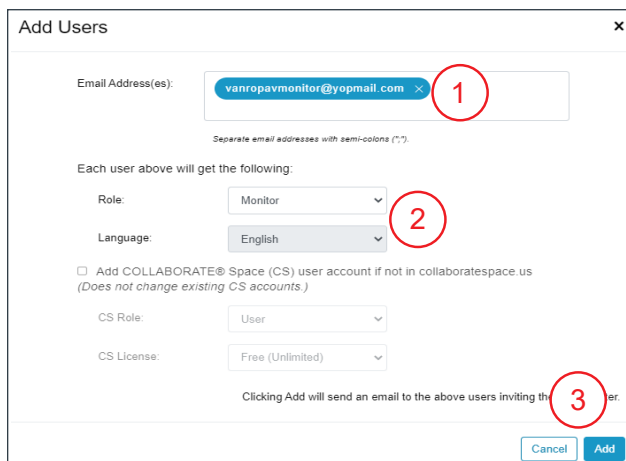
- b. On the far-right of the Users screen, click the Add Users symbol.



- c. On the Add Users dialog window, do the following:
 1. Enter one or more email addresses for the users.
 2. Use the dropdowns to select their role and language.
 3. In the lower right, click Add.



Note: Optionally, you may also add them as COLLABORATE Space users if signed into it with the proper role.



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

CONVERGENCE™ CLOUD AV MANAGER — SUPPORT ORGANIZATION

ClearOne, Technical Support Users

CONVERGENCE

Organization Users 46 Total, 3 Visible, 0 Selected

Search: bob [Search] [Show All]

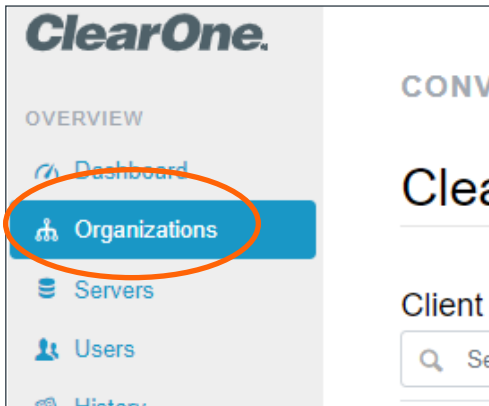
Status	Name	Email Address	Role	Last Accessed	Type	
Invited 8/4/2021	janebob	janebob@yopmail.com	Monitor	Never	Local	<input type="checkbox"/>
Invited 8/4/2021	jimbob	jimbob@yopmail.com	Monitor	Never	Local	<input type="checkbox"/>
Registered 7/8/2021	Spt_Admin_Bob	supporting@yopmail.com	Administrator	7/22/2021	Local	<input type="checkbox"/>

25 Users per page

Step 4. Add a Client Account

Complete the following steps:

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



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



- c. On the Add Client Organization Account dialog window, enter the name of the organization.

Add Client Organization Account

Choose available client organization: Choose...
 <chosen organization name or blank>

Create new client organization:

Organization Name: *

Initial Owner (Support organization member recommended)

Email address: *
 (You may use an existing user email address.)

First name:

Last name:

* Required

Client Reference #: i

- d. In the Initial Owner section, enter your email address. Then, in the lower right, click Next.

Add Client Organization Account [X]

Choose available client organization: Choose...
<chosen organization name or blank>

Create new client organization:

Organization Name:*

Initial Owner (Support organization member recommended)

Email address:*
(You may use an existing user email address.)

First name:

Last name:

* Required

Client Reference #: i

- e. On the Setup Service Plan dialog window, in the Max Pro Audio devices section, enter the quantity of devices to allocate. Base this on the quantity you expect your client will need from your pool of licensed devices.



Note the following:

- If needed, you can change the quantity of devices later.
- You may set up other Subscription settings as desired. (You may change these settings later.)
- The client reference number is a number or identifier for this client in your organization’s financial system.

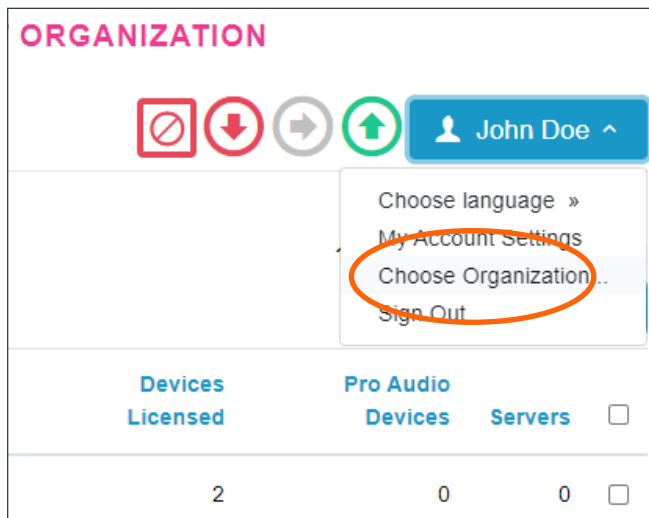
Then in the bottom-right of the Set Up Service Plan dialog window, click Review.

f. Review the client organization and plan. To edit, click Previous. To add the organization, click Add.

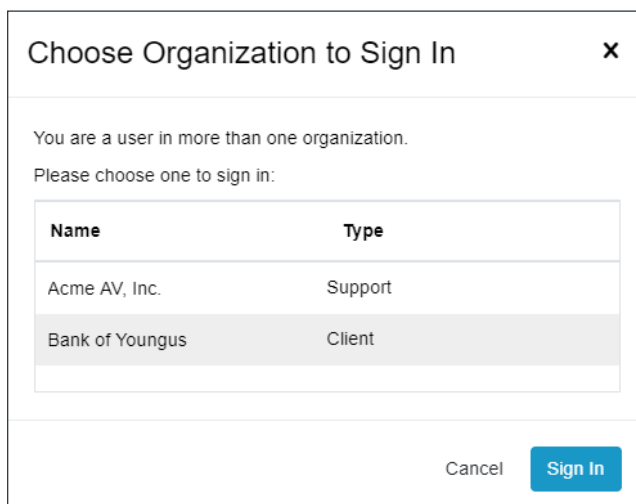
g. Review the Organizations screen to verify that CONVERGENCE lists the organization.

Status	Name	Account Number	Start Date	End Date	Devices Allocated	Pro Audio Devices	Servers
Invited	Acme AV, Inc.	C10023	8/4/2021	11/4/2021	0	0	0
Expired	ClearOne, Apps Testing	C10000	4/13/2021	8/13/2021	0	0	0
Active	ClearOne, Engineering	C10004	4/13/2021	8/13/2021	50	0	1

- h. If you used your email address for the Support Organization for the new Client Organization, you may go directly to it. In the upper-right of the screen, from the My Account Menu, click Choose Organization... (Otherwise you must sign out and then sign in from the email invitation sent to the other email address.)

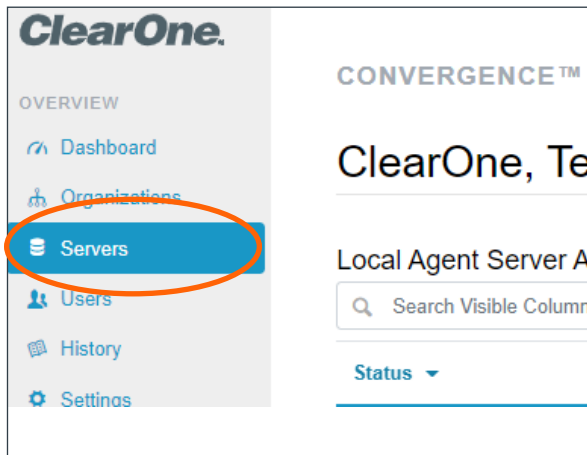


- i. From the list, click the row of the new organization. Then in the lower right, click Sign In.

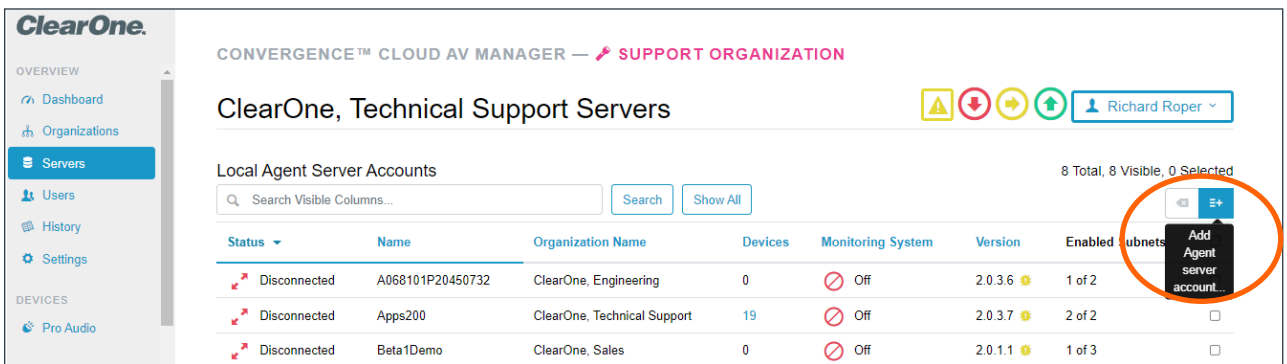


Step 5. Add a Client Local Server

- a. Now that you have set up a Client Organization and have signed into it, on the navigation bar, click Servers.



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



- 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.

A screenshot of the 'Add Agent Server Account' dialog box. It contains the following fields and instructions:

- Name:** Enter Agent server name. *Must be unique within your organization.*
- Password:** Enter Agent server password. *(Must be at least 8 characters long, contain a letter, a digit, and a special character, such as from: ~!@#\$%^&*()_~+=[]\|'";:?,)*
- Password Strength:** Weak
- Confirm:** Confirm Agent server password. *Must match above password.*

Buttons for 'Cancel' and 'Add' are located at the bottom right.

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

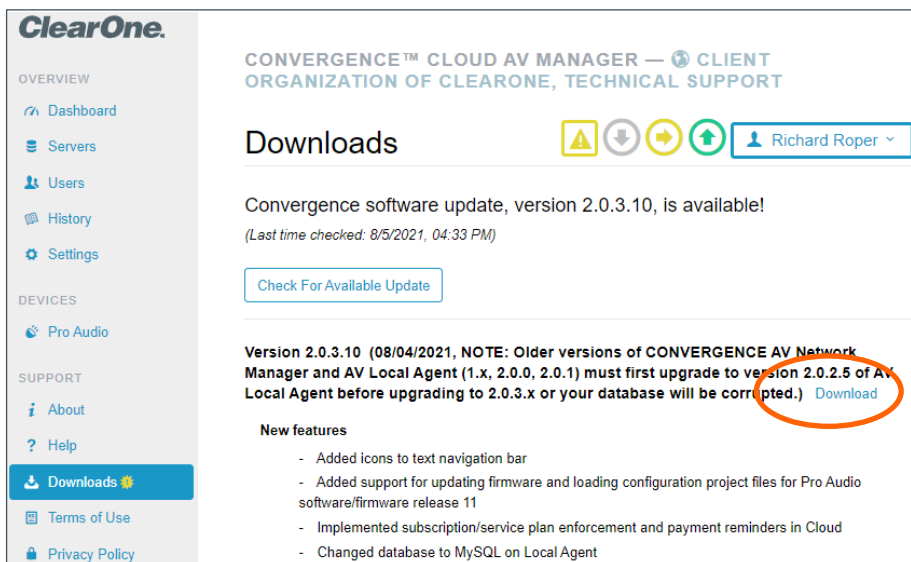
The screenshot shows the 'Servers' page in the ClearOne Cloud AV Manager interface. The page title is 'ClearOne, Technical Support Servers'. Below the title, there is a section for 'Local Agent Server Accounts' with a search bar and a 'Show All' button. A table lists the server accounts with the following columns: Status, Name, Organization Name, Devices, Monitoring System, Version, and Enabled Subnets. The row for 'Apps200' is circled in orange.

Status	Name	Organization Name	Devices	Monitoring System	Version	Enabled Subnets
Disconnected	A068101P20450732	ClearOne_Engineering	0	Off	2.0.3.6	1 of 2
Disconnected	Apps200	ClearOne, Technical Support	19	Off	2.0.3.7	2 of 2
Disconnected	Beta1Demo	ClearOne_Sales	0	Off	2.0.1.1	1 of 3
Disconnected	Beta2Demo	ClearOne_Sales	0	Off	2.0.1.1	1 of 3

Step 6. Set Up Local Servers

Now that you have your CONVERGENCE Cloud AV Manager account configured, you are ready to set up a Local Agent server.

- a. On the client’s AV network, either you or the client’s IT department should set up a Windows server on the network with the most ClearOne Pro Audio devices. (As a test, you can set up a hardware server on your own network with these devices.)
- b. Download the CONVERGENCE Local Agent AV Manager software installer by:
 1. Signing into your Cloud AV Manager account if not already.
 2. In the navigation bar, click Downloads.
 3. Click the Download link next to the latest update.
 4. Note any special instructions and follow them.



- c. Install the downloaded “ConvergenceLocalAgentSetup.exe” software onto the server as described in the Installation Guide provided as a PDF file.
- 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.



- f. In the Connect to Central Hub dialog window, do the following:
 1. In the “CONVERGENCE central hub URL” field, enter “https://cx.clearone.com”.
 2. In the Central Hub Authentication section, enter the Name and Password of the Local Agent server account you set up in CONVERGENCE Cloud AV Manager.
 3. In the lower right, click Save.

The system displays the following:

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

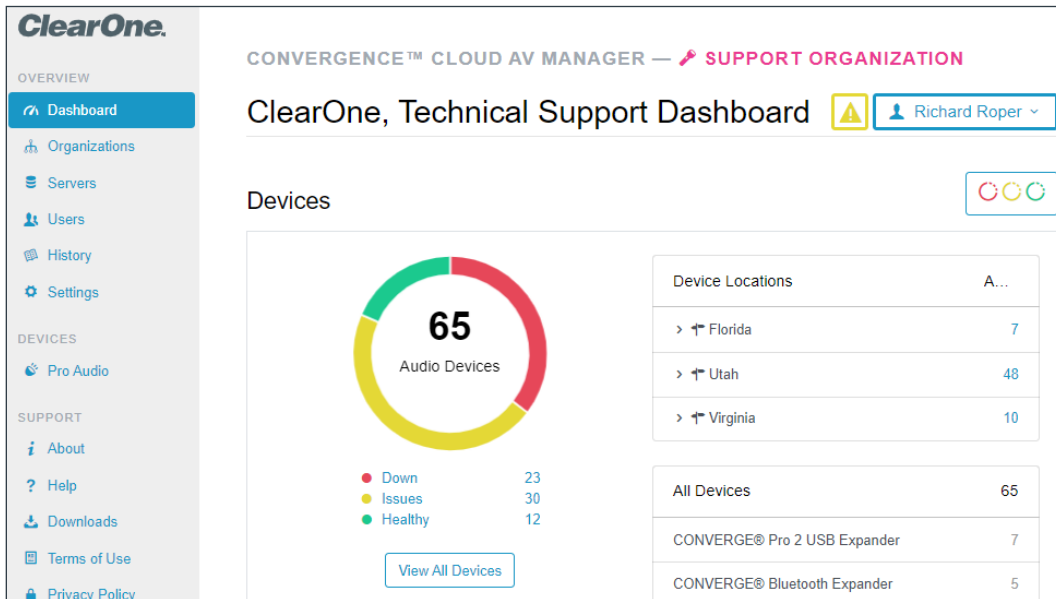
- h. Go back to your account on CONVERGENCE Cloud AV Manager and see that your server is now connected with discovered devices.

Status	Name	Organization Name	Devices	Monitoring System	Version	Enabled Subnets
Connected	staging	ClearOne, Sales	29	Active	2.0.3.9	1 of 2

- i. Repeat this process for each location you will be servicing. You will need a different Local Agent server account in Cloud AV Manager for each one. Name them in a way that will help you know where they are. Add them to the organization they will service.

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 of both your Support and Client Organizations in Cloud AV Manager.



CONVERGENCE™ CLOUD AV MANAGER — SUPPORT ORGANIZATION

ClearOne, Technical Support Dashboard Richard Roper

Devices

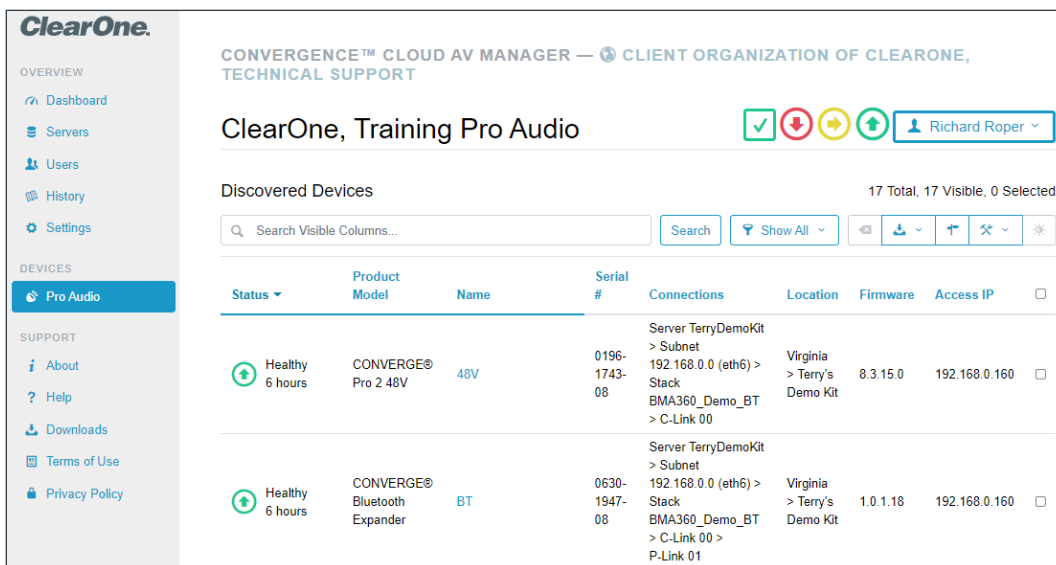
65
Audio Devices

- Down: 23
- Issues: 30
- Healthy: 12

[View All Devices](#)

Device Locations	A...
> Florida	7
> Utah	48
> Virginia	10

All Devices	65
CONVERGE® Pro 2 USB Expander	7
CONVERGE® Bluetooth Expander	5



CONVERGENCE™ CLOUD AV MANAGER — CLIENT ORGANIZATION OF CLEARONE, TECHNICAL SUPPORT

ClearOne, Training Pro Audio Richard Roper

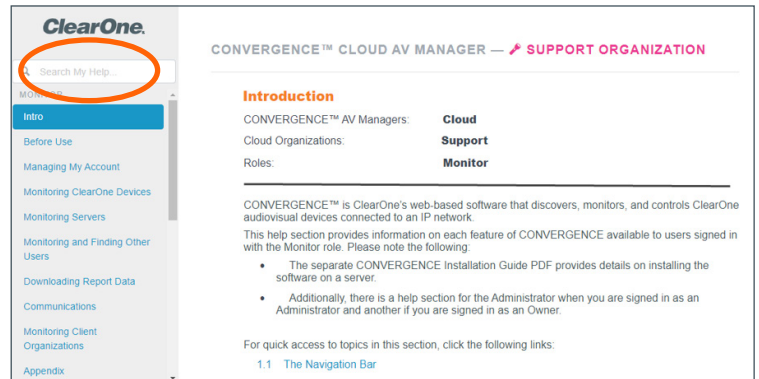
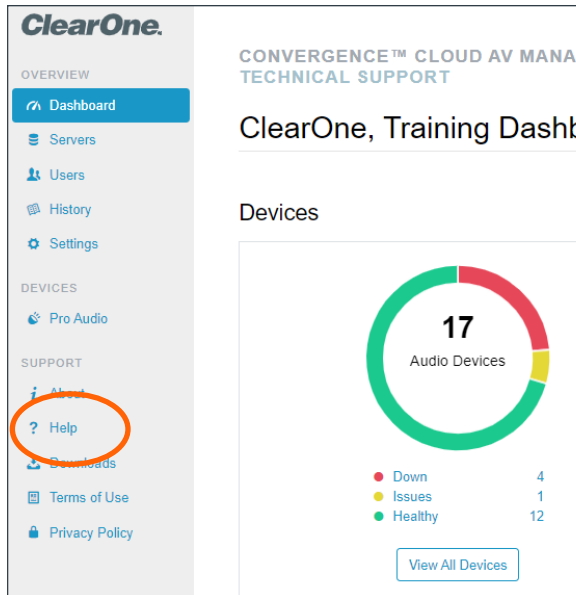
Discovered Devices 17 Total, 17 Visible, 0 Selected

Search Visible Columns... [Search](#) [Show All](#)

Status	Product Model	Name	Serial #	Connections	Location	Firmware	Access IP	
Healthy 6 hours	CONVERGE® Pro 2 48V	48V	0196-1743-08	Server TerryDemoKit > Subnet 192.168.0.0 (eth6) > Stack BMA360_Demo_BT > C-Link 00	Virginia > Terry's Demo Kit	8.3.15.0	192.168.0.160	<input type="checkbox"/>
Healthy 6 hours	CONVERGE® Bluetooth Expander	BT	0630-1947-08	Server TerryDemoKit > Subnet 192.168.0.0 (eth6) > Stack BMA360_Demo_BT > C-Link 00 > P-Link 01	Virginia > Terry's Demo Kit	1.0.1.18	192.168.0.160	<input type="checkbox"/>

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, go to your Support Organization account in Cloud AV Manager. 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, Cloud Organization, and User Role you are in. Currently you should be in the Cloud Support Owner Help, which shows pages for all user roles in the Cloud Support 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:

Topic	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

Topic	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 issues, etc.	MONITOR > Monitoring ClearOne Devices > Interactive Dashboard Operation > Device Locations Tree Table
	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 Pro Audio device or a stack	<ol style="list-style-type: none"> a. Select the device or stack in DEVICES > Pro Audio. b. Using the Download tool, choose Device Configuration. c. Make the changes to the downloaded project file using Console AI. d. In Device Tools, above the Pro Audio device list, choose Load Configuration. (See ADMINISTRATOR > Controlling Devices > Pro Audio Devices > Loading Device Configuration.)

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

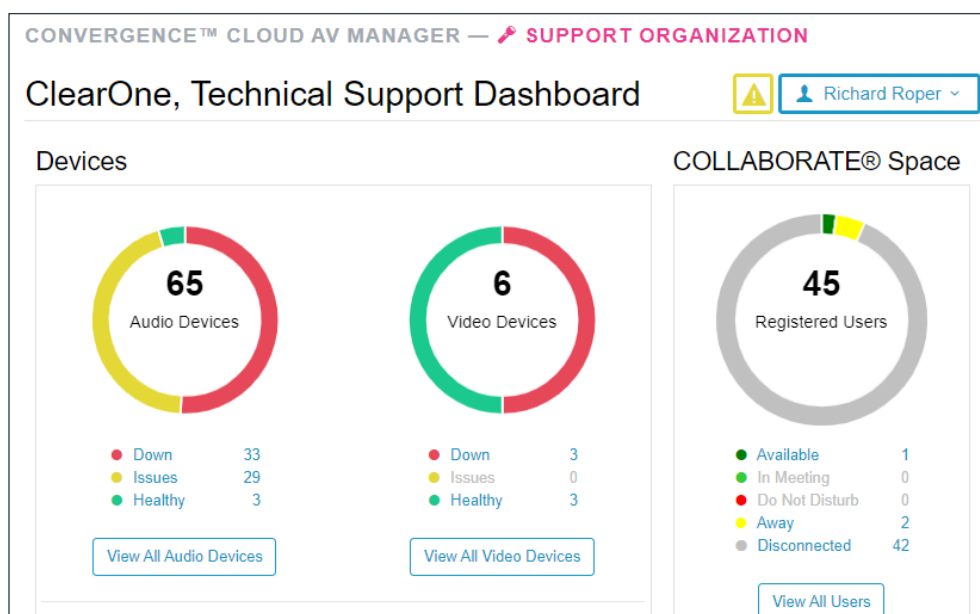
Step 8. Set Up COLLABORATE Space Communications

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.

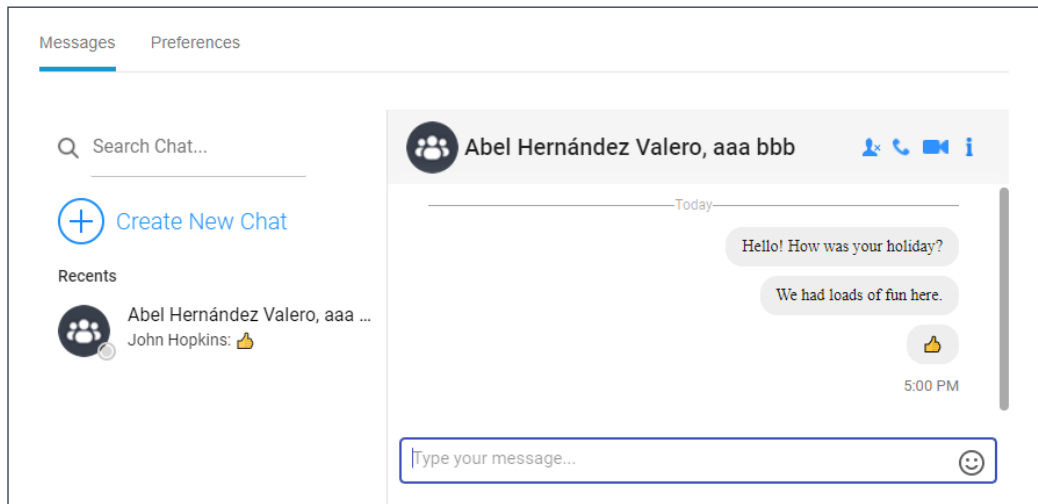
To accomplish all this, complete the following steps:

	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).
c.	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 clients 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 clients 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 clients.

