

## Onboarding checklist - OneVue Notify Bell Scheduling

This checklist is intended to aid those responsible for implementing a OneVue Notify Bell Scheduling system - from setting up OneVue, configuring and installing devices, and training staff.

The details provided in each step guides you through what's needed for a successful implementation.

### Step 1: Gather requirements

A Primex support specialist or technician works with your team to gather the following requirements.

- **PA/Bell System:** Identify the existing system. Bell Controller is compatible with a public address (PA) and/or bell system equipment that supports a two-wire direct connection. Most systems provide for an auxiliary 2 wire connection to trigger pulse tones as an alternative to direct controls and audio options. Consult with the PA or bell system manufacturer or integrator or refer to the system input connection specifications.
- **Networks:** What type of network will a Bell Controller connect to? Commonly, a Bell Controller connects to a PoE or Ethernet network. If a static IP network, what are the network settings?
- **OneVue Network Requirements:** Verify the **OneVue Network Requirements** are met, which ensures Bell Controllers can send data to and download settings from OneVue. Commonly shared with IT staff.
- **NTP servers:** A Bell Controller requires to synchronize its time to an NTP time source. By default, set to public NTP servers. Does the facility have a designated NTP time source? If yes, what are the NTP IP addresses?
- **Bells schedules:** What are the schedules for the majority of the school year (default schedule)? What are the schedules for those days the bells are to be different from the majority of the school year (exception schedule)?
- **Ring types:** Is there an existing ring pattern expected? OneVue provides several standard ring types and custom ring types can be added. A custom ring type is set to a specific ring pattern by its duration, repeat delay, and a number of rings.
- **Impromptu Bell:** Is there a need to activate a bell manually, commonly referred to as an impromptu bell? A Bell Controller's dry contact closure inputs can connect to a standalone switch or button to activate a bell manually.
- **Users (staff):** Who is responsible for the setup of bell schedules? Who will manage account settings and users? Who is responsible for device maintenance and IT support? Who will respond to alerts? How will alerts be sent to each user (text, voice, email)?
- **Alerts:** Who is to receive alerts when a Bell Controller enters an Alarm state? Will the same staff receive alerts 24/7 or are there staff shift schedules that determine the day of the week or time of day that specific staff are to receive alerts?
- **Business Units:** Is this a multi-school implementation with more than one Bell Controller? Is each school responsible for managing their own bell schedules?

## Step 2: Add Bell Controller to OneVue

When an order is placed, a Bell Controller is required to be added to your OneVue account. Primex provides **two methods** to add Bell Controllers to OneVue.

| Online Device Preconfiguration   | Onsite Configuration  |
|--|---|
| <p>Device Preconfiguration is completed online from your OneVue account. Once completed, Primex configures each device with your OneVue account ID and the settings provided during preconfiguration. It's an easy online process that allows devices to be ready for use when they arrive at your facility.</p> | <p>When a Bell Controller arrives at your facility, it's configured with the OneVue Wired Device Configurator (OWDC) app. App is only compatible with Android mobile devices.</p> <p>You will connect your Android mobile device to the Bell Controller and the app guides you through the configuration process.</p> |

## Step 3: Setup OneVue

OneVue is setup with the requirements gathered during Step 1.

- **Configure Zone default and exception schedules.** Schedules set when the bells ring at specific times, which is determined by the schedule's periods. When a Bell Controller was added to OneVue, a Zone is created for each of its relays. Now, you will need to configure the schedules for each Zone assigned to the Bell Controller relays.
- **Create custom ring types** if required. OneVue provides standard ring types and custom ring types can be added. Each period in Zone schedules are assigned to a ring type.
- **Update NTP Servers** if not using the default public NTP sources, update NTP servers from the account settings.

- **Create Users** and assign their role, device class, and alert preferences. When a new user is added, they receive an email to activate their OneVue user account. Be there are two users assigned to the Account Admin role.
- **Create Alert Rules** to notify staff (users) when a Bell Controller is not operating as expected. Alerts are generated when a Bell Controller enters an Alarm state.  
**Create Teams (optional)** if there are staff shift schedules that identify the day of the week and time of day that specific staff is to receive alerts. Teams are then assigned to Alert Rules.
- **Create Report Profiles** including both the school schedule and calendar report type.

## Step 4: Install Bell Controller and wire to existing PA/Bell System

- **Install Bell Controller** and wire relays to the existing PA/bell system. Optionally, wire impromptu bell.
- Verify Bell Controller network connectivity; successfully checks-in to OneVue at its install location.
- Verify bells ringing per schedules set in the relay's assigned zone.

## Step 5: Train staff

With any new system, staff may be faced with changes and a new way of doing things. To ensure user acceptance and avoid confusion when the system is implemented, training is very important.

Primex will work with your implementation team to determine the best training method.