ExtremeLocation Quick Start Guide

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Preface

This section discusses the conventions used in this guide, ways to provide feedback, additional help, and other Extreme Networks® publications.

Conventions

This section discusses the conventions used in this guide.

Text Conventions

The following tables list text conventions that are used throughout this guide.

Table 1: Notice Icons

Icon	Notice Type	Alerts you to...
	General Notice	Helpful tips and notices for using the product.
	Note	Important features or instructions.
	Caution	Risk of personal injury, system damage, or loss of data.
	Warning	Risk of severe personal injury.
New!	New Content	Displayed next to new content. This is searchable text within the PDF.

Table 2: Text Conventions

Convention	Description
`Screen displays`	This typeface indicates command syntax, or represents information as it appears on the screen.
The words **enter** and **type**	When you see the word "enter" in this guide, you must type something, and then press the Return or Enter key. Do not press the Return or Enter key when an instruction simply says "type."
[Key] names	Key names are written with brackets, such as **[Return]** or **[Esc]**. If you must press two or more keys simultaneously, the key names are linked with a plus sign (+). Example: Press **[Ctrl]**+**[Alt]**+**[Del]**
Words in italicized type	Italics emphasize a point or denote new terms at the place where they are defined in the text. Italics are also used when referring to publication titles.

Terminology

When features, functionality, or operation is specific to a switch family, such as ExtremeSwitching, the family name is used. Explanations about features and operations that are the same across all product families simply refer to the product as the switch.

Providing Feedback to Us

Quality is our first concern at Extreme Networks, and we have made every effort to ensure the accuracy and completeness of this document. We are always striving to improve our documentation and help you work better, so we want to hear from you! We welcome all feedback but especially want to know about:

- Content errors or confusing or conflicting information.
- Ideas for improvements to our documentation so you can find the information you need faster.
- Broken links or usability issues.

If you would like to provide feedback to the Extreme Networks Information Development team, you can do so in two ways:

- Use our short online feedback form at https://www.extremenetworks.com/documentation-feedback/.
- Email us at documentation@extremenetworks.com.

Please provide the publication title, part number, and as much detail as possible, including the topic heading and page number if applicable, as well as your suggestions for improvement.

Getting Help

If you require assistance, contact Extreme Networks using one of the following methods:

Extreme Portal	Search the GTAC (Global Technical Assistance Center) knowledge base, manage support cases and service contracts, download software, and obtain product licensing, training, and certifications.
The Hub	A forum for Extreme Networks customers to connect with one another, answer questions, and share ideas and feedback. This community is monitored by Extreme Networks employees, but is not intended to replace specific guidance from GTAC.
Call GTAC	For immediate support: 1-800-998-2408 (toll-free in U.S. and Canada) or +1 408-579-2826. For the support phone number in your country, visit: www.extremenetworks.com/support/contact

Before contacting Extreme Networks for technical support, have the following information ready:

- Your Extreme Networks service contract number and/or serial numbers for all involved Extreme Networks products
- A description of the failure
- A description of any action(s) already taken to resolve the problem
- A description of your network environment (such as layout, cable type, other relevant environmental information)
- Network load at the time of trouble (if known)

- The device history (for example, if you have returned the device before, or if this is a recurring problem)
- Any related RMA (Return Material Authorization) numbers

Subscribing to Service Notifications

You can subscribe to email notifications for product and software release announcements, Vulnerability Notices, and Service Notifications.

1. Go to www.extremenetworks.com/support/service-notification-form.
2. Complete the form with your information (all fields are required).
3. Select the products for which you would like to receive notifications.

> **Note**
> You can modify your product selections or unsubscribe at any time.

4. Click **Submit**.

Documentation and Training

To find Extreme Networks product guides, visit our documentation pages at:

Current Product Documentation	www.extremenetworks.com/documentation/
Archived Documentation (for earlier versions and legacy products)	www.extremenetworks.com/support/documentation-archives/
Release Notes	www.extremenetworks.com/support/release-notes
Hardware/Software Compatibility Matrices	https://www.extremenetworks.com/support/compatibility-matrices/
White papers, data sheets, case studies, and other product resources	https://www.extremenetworks.com/resources/

Training

Extreme Networks offers product training courses, both online and in person, as well as specialized certifications. For more information, visit www.extremenetworks.com/education/.

1 Product Overview

ExtremeLocation is a massively scalable, enterprise grade, resilient, cloud-based location and analytics solutions from Extreme Networks. With real-time location and analytics, you can engage with your customers providing personalized experience for guests and visitors. ExtremeLocation can also be used to monitor your work flows and assets to improve your overall operation and efficiency.

ExtremeLocation provides enterprises powerful location services which can scale to thousands of branch sites and 100,000 access points.

ExtremeLocation offers granular location services to address your deployment scenarios and includes:
- real-time and historical location analysis
- new and repeat visitor tracking
- engagement time monitoring
- site or zone specific intelligence
- assets and associate tracking

This product:
- Is enterprise grade, resilient and cloud based.
- Is massively scalable supporting thousands of sites and a large number of access points.
- Is quick to deploy and easy to manage.
- Provides enterprise quality location and analytics.
- Provides unlimited number of customizable dashboards for data analysis and site monitoring.
- Lets you drill down to floor level at a site to monitor assets, visitors and associates.
- Provides reports to help you proactively plan or troubleshoot issues.

Some of its main features are:
- Presence
- Zone Tracking
- Position Tracking
- Device and Associate Classification and Tracking
- Crowding Event Notification and Analytics
- Import Location Data from AirDefense Service Platform
- Import WiNG Site Hierarchy
- Scheduling Reports
- Admin and Guest Account Management
- Category Configuration
- Bluetooth Locationing
- Access Point Virtual Beacons
- Campaign Management using Payloads, Journeys, and Experiences

2 ExtremeLocation Quick Setup

Introduction

ExtremeLocation can be deployed as a stand alone installation or in a mixed environment alongside Extreme AirDefense.

ExtremeLocation can use both ExtremeWireless WiNG access points as well as ExtremeWireless access points to provide locationing services. The configuration of these access points are different and are described in detail in the sections **Configuring ExtremeWireless WiNG Access Points** and **Configuring ExtremeWireless Access Points** in the ExtremeLocation User Guide. To download the ExtremeLocation User Guide, visit the Extreme Networks Documentation site at www.extremenetworks.com/documentation/.

Please note that when deployed as a stand alone installation, the access point's channel scan configuration (when deployed as a dedicated sensor) is provided by the wireless controller it is adopted to.

However, when deployed in a mixed environment with Extreme AirDefense, the access point's channel scan configuration (when deployed as a dedicated sensor) is applied from AirDefense. The channel scan configuration received from the wireless controller is overridden by the configuration received from AirDefense.

This section helps you to set up the ExtremeLocation account, add licenses to it and start using the locationing services.

If you are a new customer, activate your ExtremeLocation account by following these steps:

1   Create an account with ExtremeLocation on its portal.
2   Create a license key from Extreme Networks License Portal - New Accounts .
3   Apply the license to your account.

If you are an existing customer with a active or inactive account, do the following:

1   Create a license key from *Extreme Networks License Portal - New Accounts*.

2 Apply the license to your account.

Once you have applied the license to your ExtremeLocation account, do the following:

1 Configure the Access Points.
2 Configure the Extreme Location Service and its Dashboard.

Before You Start

If you are a new customer, you should have the following information with you before you can create a license and start using ExtremeLocation:

- The welcome letter with the Voucher ID that you received from Extreme Networks when you purchased an ExtremeLocation subscription.
- Access to the email ID that will be used to register your ExtremeLocation account. Ensure that you do not lose access to this email ID as it will be required to retrieve or reset passwords and for any communication from Extreme Networks.

If you have an active or inactive ExtremeLocation account, you should have the following information with you:

- The welcome letter with the Voucher ID that you received from Extreme Networks when you renewed/purchased a subscription to ExtremeLocation.
- The account number of your active or inactive ExtremeLocation account.
- Access to your ExtremeLocation account's registered email ID.

Step 1: Create the ExtremeLocation Account

To create your ExtremeLocation account, navigate to its website at:

- *https://manage.extremelocation.com*

Sign Up for ExtremeLocation

ExtremeLocation is a subscription based service. You must have a valid user account with ExtremeLocation to use it.

To sign up for the ExtremeLocation service:

1 Click on the **Sign up** link below the **Login** button.

The **Sign Up** screen loads.

Figure 1: Sign Up Window

2 Enter a valid name for this account in the **Name** field. This is a mandatory field.

3 Enter a valid email id in the **Email ID** field. This email ID will serve as the log in user name for this account with ExtremeLocation. This is a mandatory field.

> **Note**
> Ensure that you have access to this email ID at all times as this email ID will be used by us to communicate with you regarding your ExtremeLocation account.

4 Optional: Enter a valid phone number in the **Phone** field.

5 Optional: Enter a valid address for communication in the **Address** field.

6 Select **Terms and Conditions** link to open the terms of service for ExtremeLocation. This is a PDF file that opens in a separate tab or window of your browser.

> **Important**
> Please read and understand the Terms and Conditions for the ExtremeLocation service.

7   Select **I have read and agree to the Terms and Conditions** option to indicate your consent to the Terms and Conditions.

> **Important**
> You cannot use the ExtremeLocation service or create your ExtremeLocation account without accepting these Terms and Conditions.

8   Select the **I'm not a robot** option and follow the instructions displayed. User registration cannot proceed without passing this check.

The **Sign Up** button is enabled once you have completed this step successfully.

9   Select the **Sign Up** button to complete the process.

Your account is set up with ExtremeLocation and the system sends emails to the ID specified in the **Email ID** field. These e-emails contain the following information:

- Your ExtremeLocation Account Number
- A link to activate the newly created account.
- An auto-generated password for use when logging in to ExtremeLocation for the first time. You will be forced to change this password during your first log in.

10 Should you need to exit without registering for an account, select **Back** button anytime during the registration process.

You are taken back to the ExtremeLocation **Login** screen.

On successful registration with ExtremeLocation, use the account activation link (sent to your registered email ID) to activate your account. Try to log in into your account from the ExtremeLocation log in screen using the registered email ID and the password sent to you by email. For further information, see Log In for the First Time on page 11.

Step 2: Activate the ExtremeLocation Account

ExtremeLocation accounts are user activated. When you sign up with ExtremeLocation, multiple emails are sent to the registered email ID for the account. One of these mails contains an activation link for this account. From that email, select the activation link. You are directed to ExtremeLocation's log in page. You cannot use your account without activating it through the link sent to your registered email ID.

Use the registered email ID and the system generated password for your new account (sent to you by email to your registered email ID) to log in to ExtremeLocation.

The ExtremeLocation Server URL is:

- https://manage.extremelocation.com

Log In for the First Time

You should have the user account and password to successfully log in to your ExtremeLocation account. You should also have activated your ExtremeLocation account using the link provided in the activation mail. This mail would have been sent to your registered email address at the time when your ExtremeLocation account was created.

When logging to ExtremeLocation for the first time, ensure that you have the following information for reference:

- Your Username and Password
- Your ExtremeLocation Account Number
- A valid License Key for this account

This information is required for logging in, changing the default password, and adding the licenses.

If you do not have any of the above information, please check the email account used to register for the account with ExtremeLocation. At the time of registration, you would have received emails from ExtremeLocation containing your account number, activation link and a temporary password for logging on for the first time. Please retain these mails for reference.

For help with account log in or other issues, please contact Extreme Support. Extreme Networks Support can be contacted through our support website located at Extreme Networks Support.

Use the ExtremeLocation log in screen to log in to your account. This screen is also used to sign up for a new account as well as to retrieve or reset missing/forgotten password.
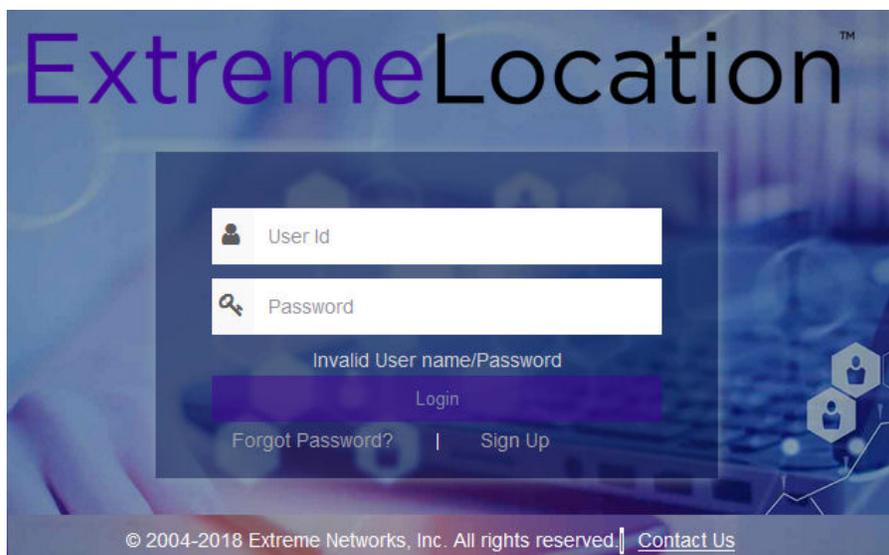

Figure 2: ExtremeLocation Log In Screen

To successfully log in, you should have the credentials that were sent to you at the time you signed up with ExtremeLocation. Your **User Id** will be the email ID that you registered with.

To log in to ExtremeLocation:

1   Provide the user name in the **User Id** field (typically the email ID that you registered with).
2   Provide the password for the user name in the **Password** field.

3 Select the **Login** button to login to the ExtremeLocation user interface.

Since this is the first time you log in to your account, you will be forced to change your password. The **Change Password** dialog displays.

4 Enter the old password into the **Old Password** field.
5 Enter the new password into the **New Password** field.
6 Enter the new password into the **Confirm Password** field to confirm it.

An error message is displayed if the passwords entered into the **New Password** and **Confirm Password** fields are not the same.

7 Select **Change Password** to save your changed password. Select **Back** at any time to exit without changing your password.

The ExtremeLocation **Dashboard** displays. You have successfully logged in to your account.

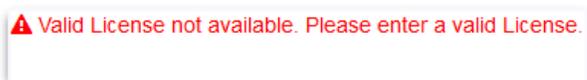Since this is the first log in, no licenses are available for this account. The following message is displayed:

Figure 3: No License Message

For more information on adding licenses, see AP License on page 19. To add App Visit licenses, see App Visit Licenses on page 20

Step 3: Generate and Apply the License

ExtremeLocation is a subscription-based service and requires a valid and in-force license to use the services. The license sets the following parameters of your ExtremeLocation account:

• The maximum number of access points that can be deployed by this account.
• The validity duration of the subscription.

You can also use the license to extend the validity of your existing subscription.

ExtremeLocation License is generated from *Extreme Networks License Portal*. You must log in to this portal and manually generate the license.

Before You Begin

Before you can generate the license, you must have the following information ready:

- The account number of your ExtremeLocation account.
- The Voucher ID received from Extreme Networks sent at the time of purchase of the subscription.

You must also have the following credentials:

- The user name and password for the ExtremeLocation website.
- The user name and password for the Extreme Networks License Portal account.

If you do not have your ExtremeLocation account, you must create it first. For more information on how to sign up for the ExtremeLocation service, see Sign Up for ExtremeLocation on page 9.

If you do not have your Extreme Networks License Portal account, you must create it. You can create your Extreme Networks License Portal account at *Extreme Networks License Portal - New Accounts*. Navigate to the portal and follow the instructions to create your License Portal account.

Generate License

You should have the credentials to log in to the Extreme Networks License Portal. If you do not have the credentials, please use the *Extreme Networks License Portal - New Accounts* link to create your credentials for the License Portal.

You should also have the following information at hand to create the license:

- The account number of your ExtremeLocation account.
- The Voucher ID received from Extreme Networks sent at the time of purchase of the subscription.

To create your license:

1 Navigate to Extreme Networks License Portal using the link provided in the welcome mail.

The following screen appears.
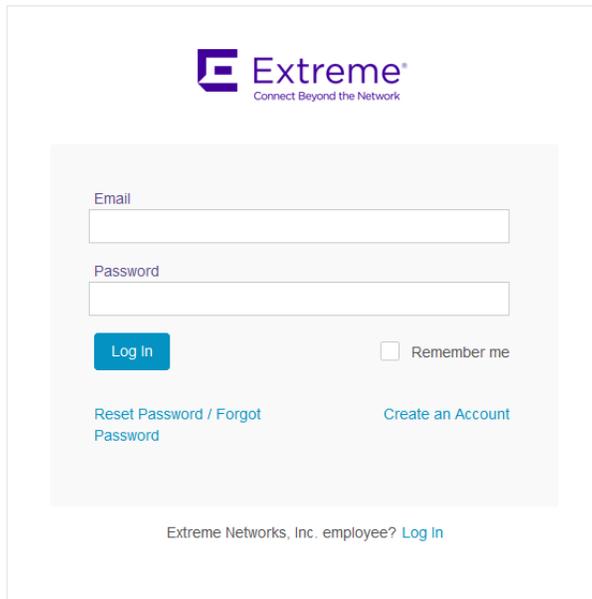
Figure 4: License Portal Login Screen

2 Provide the credentials for logging in to the License Portal.

Email   Provide the email ID registered for use with this License Portal account.

Password   Provide the password for this License Portal account.

3   Select **Log In** to enter the License Portal.

If the correct credentials are provided, the following screen appears.

Figure 5: License Portal Welcome Screen

An error message is displayed if wrong credentials are provided. To retrieve a forgotten password or to reset it, select the **Reset Password/Forgot Password** link at the bottom of the log in screen.

4   Select **Generate License**.

The following dialog appears.

Figure 6: Generate License Dialog

5   Enter the Voucher ID from your welcome mail into the **Voucher ID** field.

> **Note**
> When entering the Voucher ID, include the hyphen (-) symbol that is a part of the Voucher ID.

6   Select **Next**.

The following screen appears.

Figure 7: Activate Voucher Screen

7   Enter the ExtremeLocation account number in the **HW Serial Number** text box.

8   Select the **You must check this box...** check box to agree to the terms and conditions of the service.

We recommend that you select the **Terms & Conditions** link to read the service's Terms and Conditions before creating your license.

9   Select **Submit** to create the license.

Once a license is created, it is added to the list of available licenses and is displayed in the main screen.

10 To view the license string, select the appropriate **Voucher ID** in the table at the bottom of the main screen.

You can use the filter controls to limit the number of rows displayed in this table.

Figure 8: License Portal Welcome Screen

The screen refreshes to display detailed information about the selected Voucher ID.

11 Use the **Copy** link to copy the License Key to the PCs clipboard.

We recommend that you to save this license key temporarily in a text editor for use when activating your ExtremeLocation account.

12 Once you have created all your license keys, select the **Log Out** link to the top right of the screen to log out of Extreme Networks License Portal.

Log In to ExtremeLocation

Use the ExtremeLocation **Log In** screen to log in to your account. If you do not have an account, use this screen to sign up for a new account. You can also use this screen to reset forgotten password.

Access to ExtremeLocation is only available on subscription to the service. On subscribing to the service, you will be asked to create the account to log into ExtremeLocation dashboard. To sign up, select the **Sign Up** link on the **Log In** screen. For more information see Sign Up for ExtremeLocation on page 9.
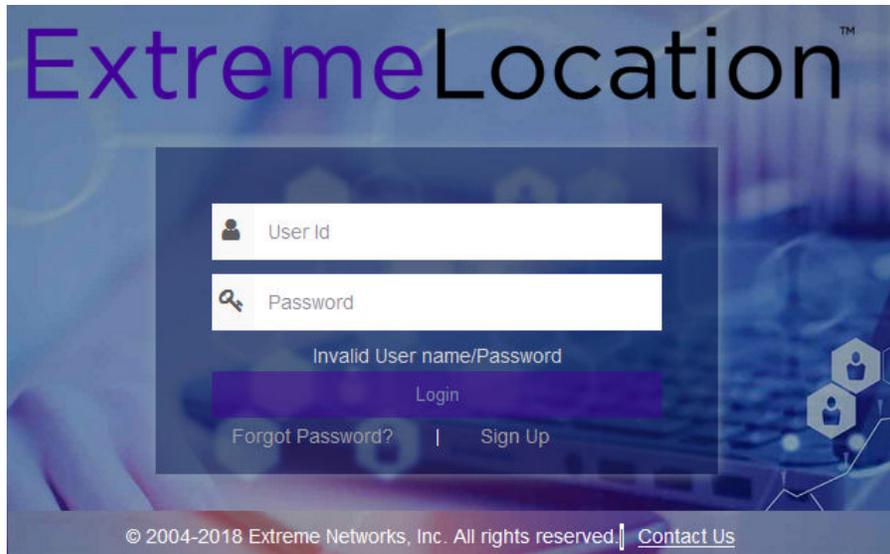
Figure 9: ExtremeLocation Login Screen

To log in into ExtremeLocation:

1   Provide the user name in the **User Id** field (typically the email ID that you registered with).
2   Provide the password for the user name in the **Password** field.
3   Select the **Login** button to login to the ExtremeLocation user interface.

AP License

AP Licenses are required for you to use ExtremeLocation locationing services. For more information on how to get ExtremeLocation licenses, see the *Quick Start Guide*. This document can be downloaded from the Extreme Networks Documentation Site.

To add or apply AP license:

1   Select **Settings** from the main menu.
2   Select **License** from the sub menu.

The **License Details** pane displays.

This dialog displays the following information:

|	
Total	Displays the total number of available licenses for this account. For a new account - without any licenses - this value is zero.
Used	Displays the number of licenses in use out of those available as shown in the **Total** field. For a new account, this value is zero.
Expiry Date	Displays the date on which the license expires. For accounts with multiple licenses, this date is the date on which the last license expires. For a new account this field displays `N/A`.
License Key	Displays the license key string.
No. of Access Points	Displays the number of access points that can be deployed in the ExtremeLocation account.
Import Date	Displays the date on which the license was imported into this account.
Expiry Date	Displays the expiry date for this license. Locationing will not work for this ExtremeLocation account after this date unless the license is renewed.

3 Select 🔵.

The **Add License** dialog displays. Use this dialog to add licenses to this ExtremeLocation account.
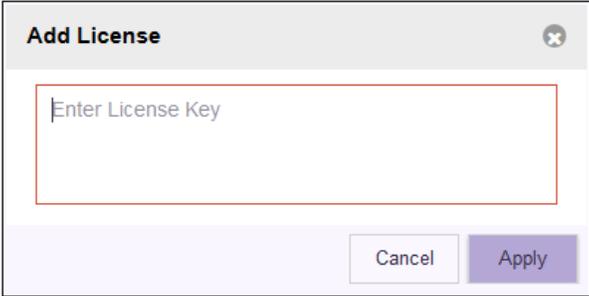
Complete the following information:

Enter License Key	Paste the license key in this space. Ensure that you do not inadvertently paste any non-printable characters in this space.

4 Select **Apply** to apply the license key.

If the license is valid for this account, the license is added to the list of licenses available for this account.

The table displays a list of all licenses (valid and expired) for this account.

License Key	Displays the complete license key as provided by ExtremeLocation support.
No. of Access Points	Displays the number of Access Points that can be used using this license.
Import Date	Displays the date on which the license was added to this account.
Expiry Date	Displays the date that the license will expire.

If the license is valid, it is added to this table.

5 Optional: At any point, select the **Cancel** button to exit without adding licenses.

App Visit Licenses

App Visit Licenses are required for you to use ExtremeLocation BLE locationing services.
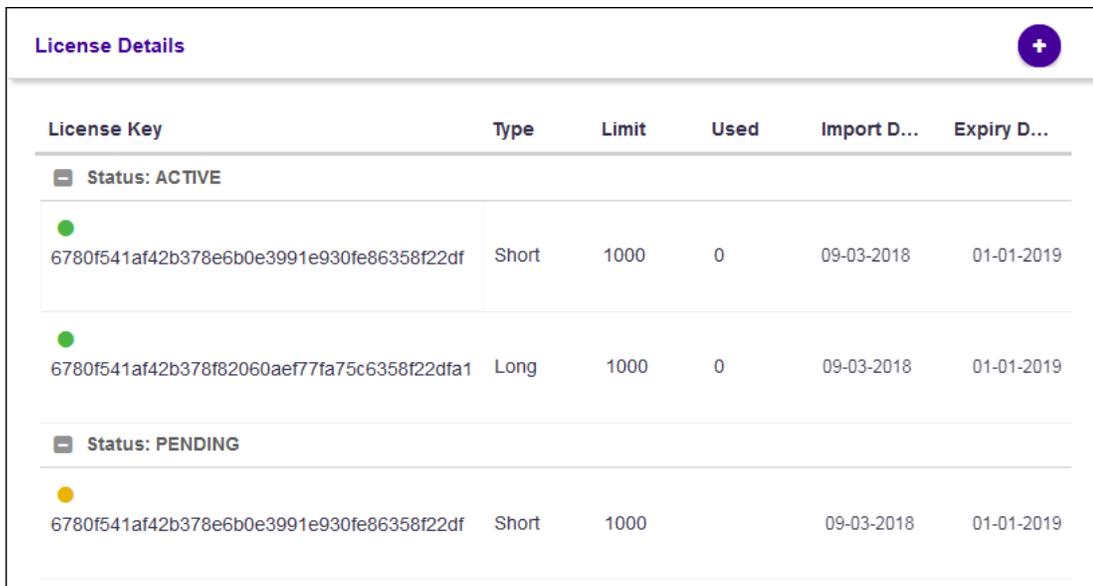
Use the **App Visit** screen to add licenses for enabling support for BLE locationing. App Visit license are purchased in bulk and are consumed when a visitor engages with your site. ExtremeLocation provides two types of App Visit licenses that are consumed based on the length of time the visitor engages with your site. These licenses are:

- Short Visit License - A short visit license is consumed when the user is seen in your site for a short duration, typically ten (10) minutes or less.
- Long Visit License - A long duration license is consumed when the user is seen in your site for a duration longer than ten (10) minutes.

To add App Visit licenses to your account:

1 Select **Settings** from the main menu.
2 Select **App Visit** from the **License** sub menu.

The **License Details** pane for App Visit licenses opens.

Licenses in this screen are classified as **Active** and **Pending**. All active licenses - short visit and long visit licenses - are displayed within this heading. At any time there can only be one short visit license and one long visit license active.

The **Pending** heading lists all the short visit and long visit licenses that are added to this account but are yet to be activated. Licenses under this heading are applied sequentially according to the dates when they were imported to this account. A license in the pending state becomes active once an active license is completely consumed.

App Visit Licenses are considered consumed based on settings for each of your site. For more information on how App Visit Licenses are consumed, see the topic Add a Site on page 33.

This screen displays the following information:

License Key	Displays the license key string. This field also indicates the current status of the license. A green dot indicates that the license is in use. An yellow dot indicates that the license has been added but is in pending state.

Type	Displays the type of license. License can be either short visit or long visit license. A short visit license is consumed when a device visits the site for a duration less than a specific time limit (default ten (10) minutes). A long visit license is consumed when a device visits the site for a duration longer than the specified time limit.
Limit	Displays the license's visit limit. Each license has a set number of visits that are supported by the license. When a device consumes a license, that is, when a device visits a site for the specified time duration, the **Used** counter is increased by one. When the **Used** value reaches the **Limit** value, the license becomes inactive and ExtremeLocation stops providing locationing service for those category of devices. You must add a license of the same type to continue using ExtremeLocation service.
Used	Displays the number of licenses used till now. When this value reaches the value in the **Limit** column, the license becomes inactive and service is stopped. You must add a license of the same type to continue using ExtremeLocation service.
Import Date	Displays the date on which the license was imported into this account.
Expiry Date	Displays the expiry date for this license. Unused licenses cannot be used after the license expires. Unused licenses cannot be carried over on renewal.

3   Select ⊕ icon to add new App Licenses.

The **Add License** dialog displays. Use this dialog to add licenses to this ExtremeLocation account.
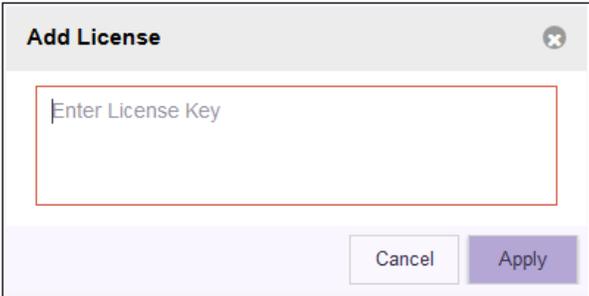
Complete the following information:

Enter License Key   Paste the license key in this space. Ensure that you do not inadvertently paste any non-printable characters in this space.

4   Select **Apply** to apply the license key.

If the license is valid for this account, the license is added to the list of licenses available for this account.

The table updates to display the list of all licenses (active and pending) for this account. If there are active licenses, your newly added license can be found under the **Pending** section of the table.

5   Optional: At any point, select the **Cancel** button to exit without adding licenses.

Step 4: Configure the Access Points

ExtremeWireless WiNG Access Points

The following ExtremeWireless WiNG access points are supported by ExtremeLocation.

- AP7522
- AP7532
- AP7562
- AP7602
- AP7622
- AP7612
- AP7632
- AP7662
- AP8432
- AP8533

> **Note**
> It is assumed that you have a running WiNG instance and have access to configure the required WiNG devices.

> **Note**
> To successfully import access points into your ExtremeLocation managed sites, the access points must be online and must be reporting to ExtremeLocation.

Before you can use the ExtremeWireless WiNG access points at your ExtremeLocation site, the following configurations must be performed on each access point that is to be deployed:

1 Create/Update your Sensor Policy
2 Update the RF Domain policy:
   - Add or update the Sensor Policy configuration.
   - Set the Location Server Configuration.
   - Set the Country of Operation.
3 Set the Radio mode in the device's profile:
   - Configure a radio to be a dedicated sensor or multitask as a sensor along with sending and receiving traffic.

For more information on using ExtremeWireless WiNG access points at your ExtremeLocation managed site and for more information needed to perform the above configurations, refer to the *ExtremeLocation User Guide*. You can download this guide from the Extreme Networks Documentation Site.

When installing ExtremeWireless WiNG access points for use in a side-by-side installation of ExtremeLocation and AirDefense Service Platform, the following configurations must be performed on each ExtremeWireless WiNG access point to be deployed:

1 Create/Update your Sensor Policy
2 Update the RF Domain policy:
   - Add or update the Sensor Policy configuration.
   - Set the Location Server Configuration.
   - Set the Extreme AirDefense Server Configuration.
   - Set the Country of Operation.
3 Set the Radio mode in the device's profile:

- Configure a radio to be a dedicated sensor or multitask as a sensor along with sending and receiving traffic.

> **Note**
>
> To successfully import access points into your ExtremeLocation managed sites, the access points must be online and must be reporting to ExtremeLocation.

Once you have completed the above configuration on each of the access point to be deployed, you must go to each site and upload a list of those access points that will be deployed there.

1 From the **Sites** screen, select the site for which you need to upload the list of access points. You must use the drop-down list to select the site and then select the ✎ icon to edit it. You could also use the ▦ icon to view a lists of the sites managed by your ExtremeLocation account. In this case select the ✐ icon located under the **Actions** column to edit the site.

2 Select the **Additional** tab located to the bottom of the **Sites** edit dialog.

3 Use the **AP Placement** field to upload your `.csv` file containing the list of access points to be deployed at this site.

4 You should now see a list of all access points that are available for deployment in your **Sites** > **Floor** > **AP** screen.

ExtremeWireless Access Points

The following ExtremeWireless access points are supported by ExtremeLocation.

- ExtremeWireless AP3912
- ExtremeWireless AP3915
- ExtremeWireless AP3916
- ExtremeWireless AP3917
- ExtremeWireless AP3935
- ExtremeWireless AP3965

> **Note**
>
> It is assumed that you have access to configure the required ExtremeWireless devices.

> **Note**
>
> To successfully import access points into your ExtremeLocation managed sites, the access points must be online and must be reporting to ExtremeLocation.

Before you can use the ExtremeWireless WiNG access points at your ExtremeLocation following configurations must be performed on each access point to be deployed:

1 Enable Security Analysis Engine under the WIPS tab

2 Provide the IP address of the ExtremeLocation Server

3 Apply the appropriate WLAN to each radio on the access points

For more information on using ExtremeWireless access points at your ExtremeLocation managed site and for more information needed to perform the above configurations, refer to the *ExtremeLocation User Guide*. You can download this guide from the Extreme Networks Documentation Site.

When installing ExtremeWireless access points for use in a side-by-side installation of ExtremeLocation and AirDefense Service Platform, the following configurations must be performed on each ExtremeWireless access point to be deployed:

1 Enable Security Analysis Engine under the WIPS tab
2 Create a AirDefense Scan Profile and configure the AirDefense Server information and select the access points that will act as sensors for AirDefense

> **Note**
>
> To successfully import access points into your ExtremeLocation managed sites, the access points must be online and must be reporting to ExtremeLocation.

Once you have completed the above configuration on each of the access point to be deployed, you must go to each site and upload a list of those access points that will be deployed there.

1 From the **Sites** screen, select the site for which you need to upload the list of access points. You must use the drop-down list to select the site and then select the ☑ icon to edit it. You could also use the ▦ icon to view a lists of the sites managed by your ExtremeLocation account. In this case select the ✎ icon located under the **Actions** column to edit the site.
2 Select the **Additional** tab located to the bottom of the **Sites** edit dialog.
3 Use the **AP Placement** field to upload your `.csv` file containing the list of access points to be deployed at this site.
4 You should now see a list of all access points that are available for deployment in your **Sites** > **Floor** > **AP** screen.

Step 5: Configure a Category

A Category is a logical region on a floor on which you can run analytics and user engagement activities. Categories are managed from the **Categories** screen. You can create multiple categories and the same category can be used across all your sites.

Categories

In ExtremeLocation, a Category is defined as a logical region on a floor on which you can run analytics and user engagement activities. Use the ⚙ icon to view the **Category** screen.

The **Category** screen displays the following information:

Field	Description
Name	Displays the name of the category.
Beacon Count	Displays the number of beacons to which this category is assigned.
AP Count	Displays the number of Access Points to which this category is assigned.
Site Count	Displays the number of sites that have used this category.
Experiences Count	Displays the number of Experiences that have been created for this category.
Actions	Lists the actions that can be performed on this category entry. Select the ![eye icon] icon to view this Category's details.

Use the ![plus icon] icon to add a new Category. Periodically use the ![refresh button] button to refresh this screen manually.

Use the ![download icon] icon to download the categories listed in this screen in a *.csv* file.

> **Note**
>
> You can add a beacon to this category through the *ExtremeLocation Beacons* App. This app is only available on Apple™ App Store. For more information on how to add beacons to your category, see *ExtremeLocation Beacon Onboarding Guide*. This guide can be downloaded from the Extreme Networks Documentation Site.

Create a Category

To create a new category:

1   Use the ![plus icon] icon to add a new category.

A new Category is created and the following screen displays.

Enter the following information for the new Category:

Field	Description
Name	Enter a name for this category. The name should be such that it identifies the category among other similar ones.
Description	Enter a brief description about this category. Use this space to provide more information about this category.
Crowding Threshold	Use this spinner to set the crowding threshold for this category. When this threshold exceeds, a crowding event is generated for this category. A crowding event is generated when the ratio of the number of visitors to the number of associates assigned to this category exceeds this threshold.

2   Select the **Save** button to save the changes made to the **General Information** screen. At any time, select the **Cancel** button to exit without creating the Category.

3   Select the **Settings** menu item.

The **Settings** screen displays.

Select the ✏ icon to update the Category's settings. Configure the following:

Field	Description
Site Wide	Select this switch to enable the Category to be marked as *Sitewide*. When marked as *Site Wide*, any Experience that is attached to this category is triggered when a user's device sees any beacon at the site or if the device is within the Geofence boundary set for this site. Use the following values to control when the experience is triggered. - All - When this option is selected, the Experience will be triggered if the visitor device sees a beacon or is inside the Geofence for the site. - Beacon - When this option is selected, the Experience is only triggered when the visitor device sees a beacon assigned to this site. - Geofence - When this option is selected, the Experience is only triggered when the visitor device is within the marked Geofence boundaries of this site.
Physical Web URL	Use this field to configure a Web URL. Any beacon associated with this Category that is broadcasting with the *Physical Web* mode will re-direct the visitor to this external Web URL when it enters this Category.

4   Select the **Save** button to save the changes made to the **Settings** screen.

5   Select the **Beacon Defaults** menu item

The **Beacon Default** screen displays.
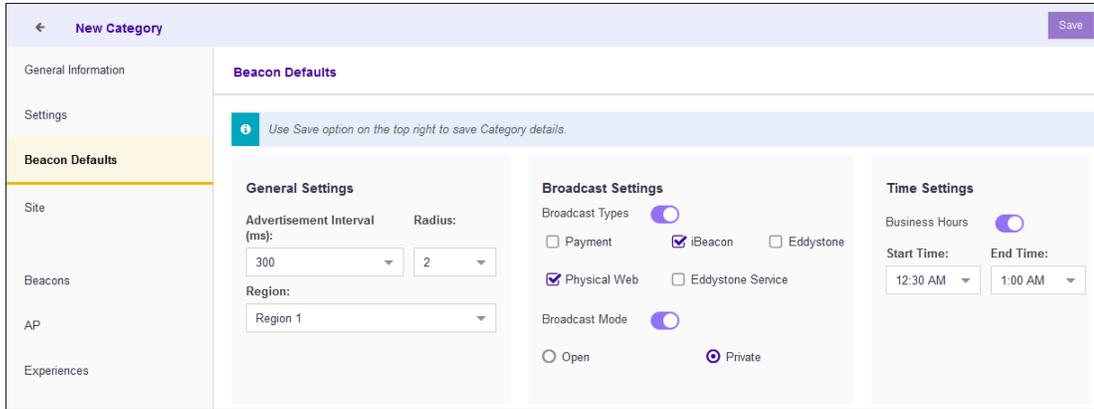
Select the ✏ icon to update this Category's **Beacon Defaults** configuration. Configure the following:

Field	Description
Advertisement Interval (ms)	Set the duration in milliseconds between two consecutive beacon broadcasts.
Radius	This value configures the strength of the beacon's broadcast. Use the spinner to set the strength in the range 1-8 where 8 is the strongest signal with maximum broadcast range.
Region	The ExtremeLocation solutions configures twelve (12) unique regions for identifying beacons. Each beacon must be assigned one of these twelve regions. This unique value is used to facilitate the identification of a beacon within multiple Categories that are next to each other. Use the drop-down list to select an appropriate region for the category.
Beacon Types	Use this switch to configure the beacon's broadcast types. Select the broadcast types from the following options: • Payment - Select this option to indicate that this broadcast will be of this type. When selected, the **Broadcast Mode** will automatically be set to `Private`. • iBeacon - iBeacon is Apple™ proprietary beacon format. Select this option to indicate the beacon broadcasts in the iBeacon format. • Eddystone - Eddystone is Google™ proprietary beacon format. Select this option to indicate the beacon broadcasts in the Eddystone format. • Physical Web - Select this option to indicate that the user is to be redirected to a configured Web URL when the beacon is heard by the visitor device. • Eddystone Service - Eddystone Service is Google™ proprietary beacon format. Select this option to indicate the beacon broadcasts in the Eddystone format.
Broadcast Mode	ExtremeLocation supports two broadcast formats. When this value is set to `Open`, the beacon broadcasts do not rotate the unique identifiers used while broadcasting. When set to `Private`, the unique identifiers for the beacons rotate periodically.

Field	Description
Business Hours	Use this switch to set conditions where the beacons broadcast only during specific times during the day. Use this option to conserve and extend the beacon's battery life. When not enabled, the beacons broadcast continually.
Start Time	Use the drop-down list to select the time when the beacon starts broadcasting in the calendar day.
End Time	Use the drop-down list to select the time when the beacon stops broadcasting in the calendar day. You can select hours in increments of 30 minutes.

6 Select the **Save** button to save the changes made to the **Beacon Defaults** screen.

7 Select the **Site** menu item.
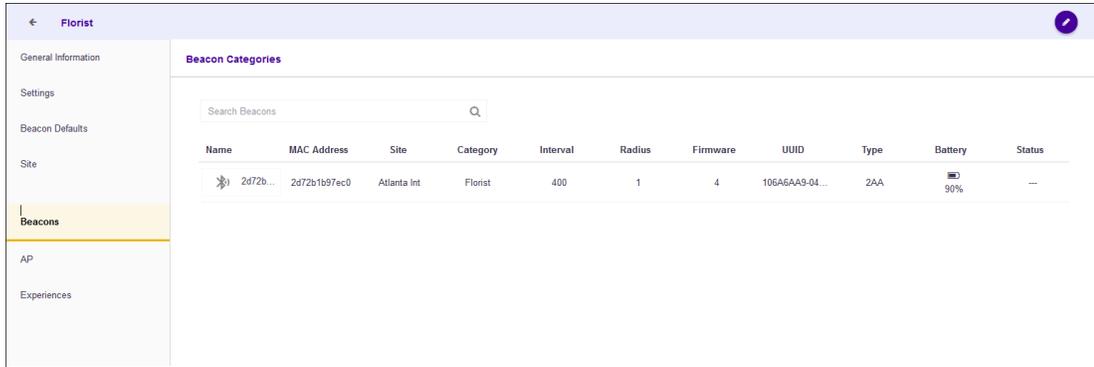
The **Site Categories** screen displays.
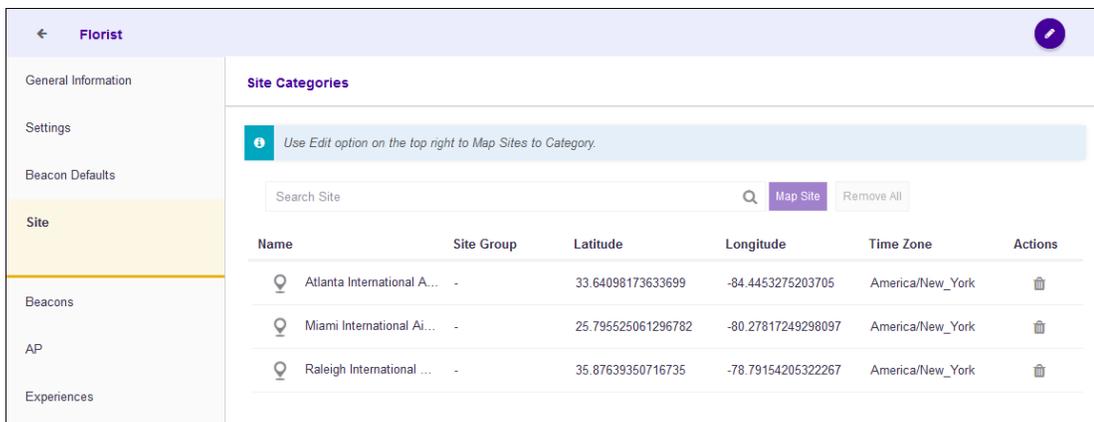
The following information is displayed:

Field	Description
Name	Displays the name of the site attached to this category.
Site Group	If the site is associated with a site group, then that site group name or names are listed in this field.
Latitude	Displays the latitude of the physical location of this site.
Longitude	Displays the longitude of the physical location of this site.
Time Zone	Displays the local time zone at this site.
Actions	Lists the actions that can be performed on this site. Use the 🗑 icon to delete this site's association with this category. The site itself is not deleted.

Select the ✏ icon to update this Category's associations with Sites. Use the **Map Site** button to map sites to this category.

8 Select the **Save** button to save the changes made to the **Sites** screen.

9 Select the **Beacons** menu item.

The **Beacon Categories** screen displays.

The following information is displayed:

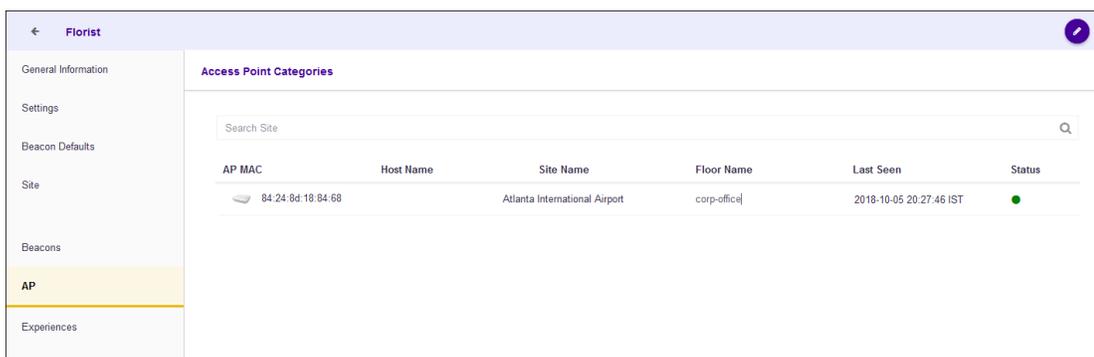| Field	Description
Name	Displays the name assigned to this beacon.
MAC Address	Displays the MAC address of this beacon.
Site	Displays the name of the site where this beacon is deployed
Category	Displays the name of the category to which this beacon is associated.
Interval	Displays the configured beacon broadcast interval for this beacon.
Radius	Displays the Radius value for this beacon. This indicates the broadcast strength of the beacon.
Firmware	Displays the Firmware version supported by the beacon.
UUID	Displays the unique UUID assigned to this beacon.
Type	Displays the type of beacon.
Battery	Displays the remaining battery life of this beacon.
Status	Displays the status of the beacon.

Note

You cannot add or modify beacons using this screen.

10 Select the **AP** menu item.

The **Access Point Categories** screen displays.

The following information is displayed.

Field	Description
AP MAC	Displays the MAC address of this Access Point.
Host Name	Displays the host name assigned to this Access Point. If the host name is not assigned, shows a blank entry.
Site Name	Displays the name of the site where this Access Point is deployed.
Floor Name	Displays the name of the floor where this Access Point is deployed.
Last Seen	Displays the timestamp when this Access Point was last seen by ExtremeLocation system.
Status	This field provides a visual indication about the Access Point. A Green dot indicates that the Access Point is active.

Note

You cannot add or modify Access Points using this screen.

11 Select the **Experiences** menu item.

The **Experience Categories** screen displays.

The following information is displayed.

Field	Description
Experiences	Displays the name of the Experience assigned to this Category.
Delivered	Displays the number of times this Experience has been delivered when assigned to this Category
Max Delivery	Displays the maximum number of times that this Experience can be delivered by this Category. Once this number of Experiences have been delivered by this Category, this Category stops delivering the Experience.
Categories	Displays the number of Categories that have been assigned this Experience.
Payload	Displays the name of the Payload assigned to this Experience.

Note

You cannot add or modify Experiences using this screen.

Step 6: Configure the ExtremeLocation Service

The ExtremeLocation Service configuration activities such as creating and managing sites, adding floors, and others activities are performed through the **Sites** screen. The following activities can be performed:

- Create a Site.
  - Allocate licenses to the site.
  - Allocate access points to the site.
  - Allocate beacons to the site.
- Place an access point on a floor map in the site.
- Place beacons on a floor map in the site.
- Create Regions/Category/Zones for the site.

Add a Site

Sites are locations that are monitored using the ExtremeLocation system. A site is a physical area such as a store, hotel or a hospital or a venue such as a shopping mall or airport for which you capture locationing data. A typical site is made up of one or more floors which are further divided into logical areas or categories. Categories or zones are used to logically separate the floor for ease of locationing and visitor tracking.

For each floor in a site, you must upload a floor map if you want to use the zone or position tracking feature. You need not upload a floor map if you want to use the presence feature only. Use the floor map to accurately mark the locations of the access points installed on the floor. The access points gather the location data for all visitors to the floor and this information is used along with the mapped zones or categories to accurately track visits and visitors to the floor and to each zone on the floor.

To create a new Site:

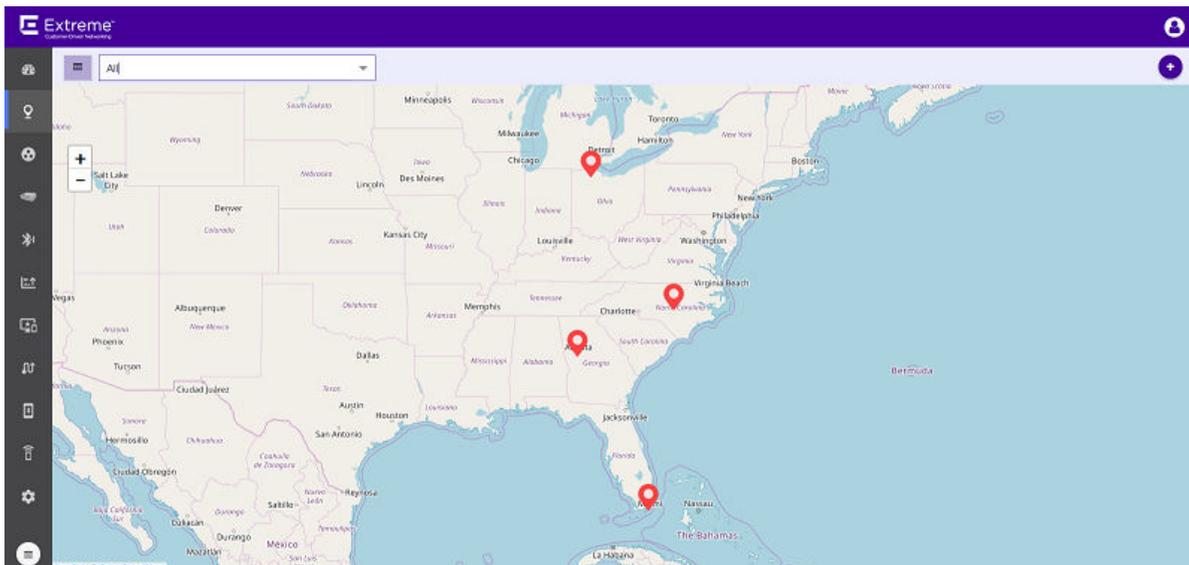1   Select **Maps** from the main menu.

    The **Maps** screen appears.

Figure 10: Maps Screen

2   Use ⊕ icon located to the right side of the screen to add a new site to this ExtremeLocation account.

    The icon displays a menu containing options to add a new Site or a new Site Group. From the menu, select **Create Site**.

    The following dialog displays.

Figure 11: New Site Dialog

3

Use the blinking site placement icon, , located at the center of the **Maps** screen to accurately place the site on the displayed map.

Drag the site placement icon to a location nearest to the actual location on the map. Use the map's zoom control and drag feature to place the icon at the site's exact geo-location on the map.

The exact location coordinates (latitude and longitude) and the time zone for the location are populated in the dialog.

4   Provide the following information for creating the new site.

Name

Provide a name for this site. The site's name should be descriptive such that identifying the site among similar sites becomes easier. This is a mandatory field.

Description

Provide a brief description about the site. The information in this field should describe the site in more detail than the name.

Location - lat

Displays the exact latitude of the location of the blue site placement icon. This field is automatically populated with the exact latitude of the location under the blue site icon. This field is updated automatically when you move the blue site placement icon to a new location.

Location - lon

Displays the exact longitude of the location of the blue site placement icon. This field is automatically populated with the exact longitude of the location under the blue icon. This field is updated automatically when you move the blue site placement icon to a new location.

Time Zone

Use this field to set the time zone for the location. When a site is located using the site placement icon, this field is automatically populated with the correct time

zone for the location. You can also use the drop-down list to select the correct time zone for this location. This is a mandatory field.

Street

Use this field to provide a street address for the site. This is a mandatory field.

City

Use this field to provide the name of the City where the site is located. This is a mandatory field.

State

Use this field to provide the name of the State where this site is located. This is a mandatory field.

Postal Code

Use this field to provide the country specific Postal Code for the location where the site is located. This is a mandatory field.

Country

Use this field to provide the Country where this site is located. This is a mandatory field.

Map to Site Group

Use the drop-down list and select the Site Group to assign this to this site. Site groups are a logical grouping of sites that share some similar characteristics. Assigning a Site Group is not mandatory.

5   Select the **Additional** label to expand it.
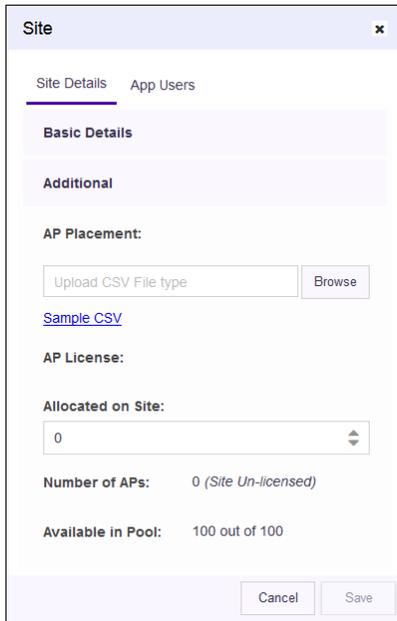
The AP Placement control assigns access points to the site using their MAC addresses.

Use the **Upload CSV File type** control to upload a list of Access Points to be assigned to this site. The list of assigned access points must be placed in a Comma Separated Value (CSV) file before uploading to the site.

> **Note**
>
> When adding MAC addresses of ExtremeWireless access points with two LAN ports, add the MAC address of the LAN port marked as 'Lan 1'. The following ExtremeWireless access points have two LAN ports.
> - AP3917
> - AP3935
> - AP3965

Selecting the **Sample CSV** link downloads a `.csv` file that can be used as a template for the file containing the list of access point MAC Addresses to be assigned to this site. Use the **Browse** button to navigate to the `.csv` file on the local PC.

Use the **Allocated on Site** spinner to allocate licenses to this site. You cannot allocate more licenses than those available for use. The number of licenses is displayed in the **Available in Pool** field.

The **Number of APs** field displays the number of access points assigned to this site. The **Available in Pool** field displays the number of licenses available for assignment across all the sites for this ExtremeLocation account.

When a license is assigned to the site, it reduces the total number of licenses available for use for this ExtremeLocation account. The number of licenses that can be allocated to this site cannot exceed the total number of licenses available with this ExtremeLocation account.

Each access point added to the site consumes one license and is reflected in the used field.

6   Select the **App Users** tab to expand it.
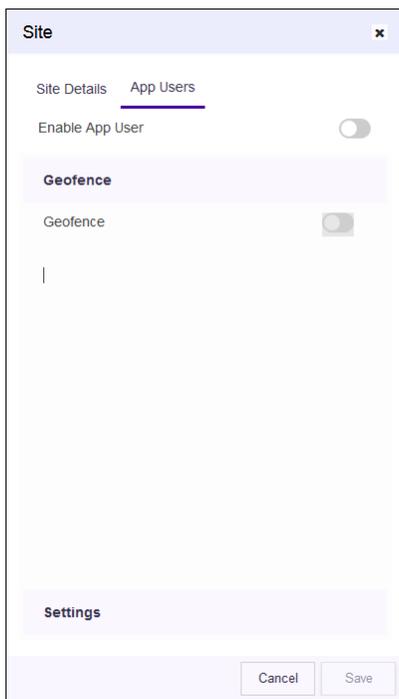
By default, App Users are not enabled for any site. You must use the **Enable App Users** switch to enable. When enabled, the controls under the **Geofence** and **Settings** headings are enabled.

7   To configure the Geofence for this site, select the **Geofence** switch to activate it.

The **Geofence** screen displays where you can configure its parameters.
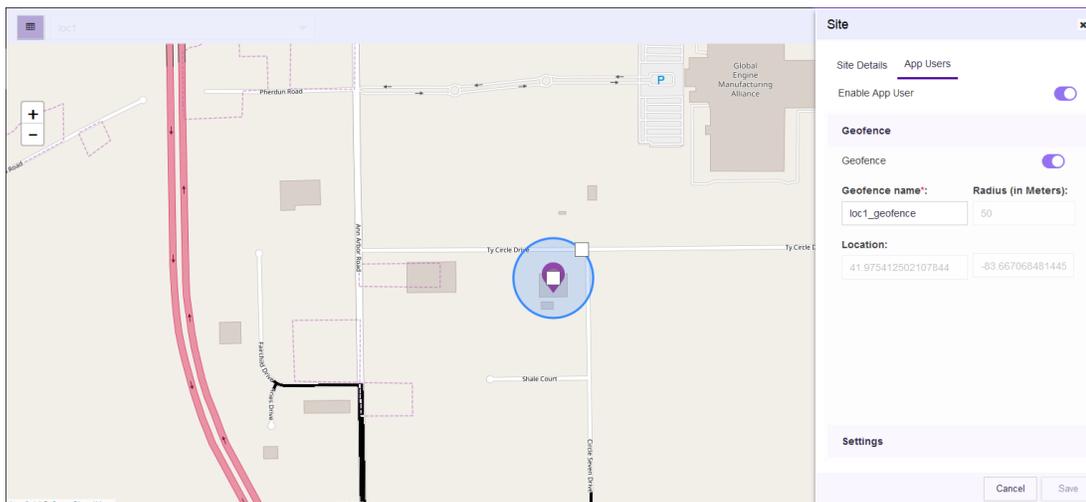
Use the Geofence around your site to run analytics on nearby devices and to find new engagement opportunities. Only one Geofence can be configured for your site.

The following parameters can be configured:

Geofence Name	Provide a meaningful name for this Geofence. This Geofence is specific to this site and this information is not available for other sites manged by this ExtremeLocation account.
Radius (in Meters)	Use the map area to configure the Geofence radius.

Use the square in the center of the site to move the Geofence's origin. If the origin of the Geofence is changed, it is dynamically reflected in the **Location** fields.

Use the square on the blue circle to increase or decrease the size of the Geofence. The value in the **Radius (in Meters)** field dynamically changes to show the current radius.

8 Select the **Settings** heading to expand it.

Configure the following settings:

Dwell Time	You can now configure the Dwell Time for each site. The **Dwell Time** slider has two knobs that control the `Outside`, `Inside Bounce` and `Inside Engage` durations. Use these knobs to set the appropriate durations for these visit types.

Visit Duration (minutes)	Use the spinner to set the Visit Duration in minutes the user must spend within a site before an App license is considered consumed. This value along with the value configured in the **Capture Zones** field are considered before an App license is considered consumed.
	For example, if the **Visit Duration** value is five (5) and the **Capture Zones** value is two (2), then an App license is considered consumed only when the visitor has spent five minutes in the site and has already visited two categories.
Capture Zones	Use the spinner to set the number of zones an App User device must visit before considering an App license is consumed. This value along with the value configured in the **Visit Duration** field are considered before an App license is considered consumed.
	For example, if the **Visit Duration** value is five (5) and the **Capture Zones** value is two (2), then an App license is considered consumed only when the visitor has spent five minutes in the site and has already visited two categories.

9   Select the **Save** button to save and create the new site.

At any point of time, select the **Cancel** button to exit without creating the site.

The new site is created with the information provided in this dialog. The site becomes available for use immediately.

10   Use the **Maps** view to locate your new site and select it.
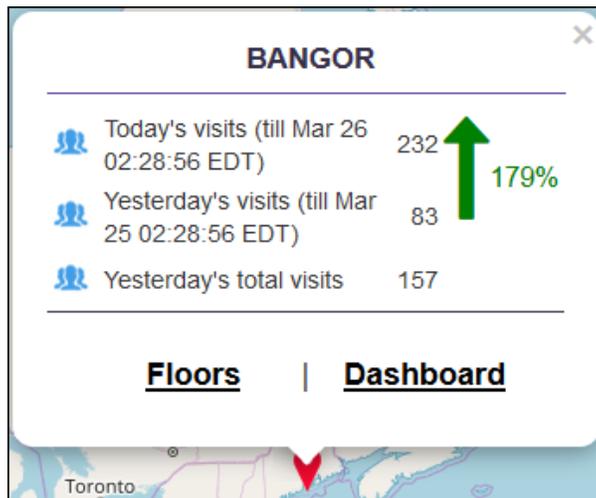
The site's information is displayed as a pop-up dialog.

Figure 12: Site Information Pop-up

The next step is to add a floor to the site. To add a new floor, see Add a Floor on page 40.

Add a Floor

A Floor is a physical division on the site. A site must have one floor and can have multiple floors. Optionally, you can assign each floor on the site a floor map. Floor map is not required if you only require presence information. Floor map is required for zone and position tracking. This information is then used by ExtremeLocation to provide locationing and other services.

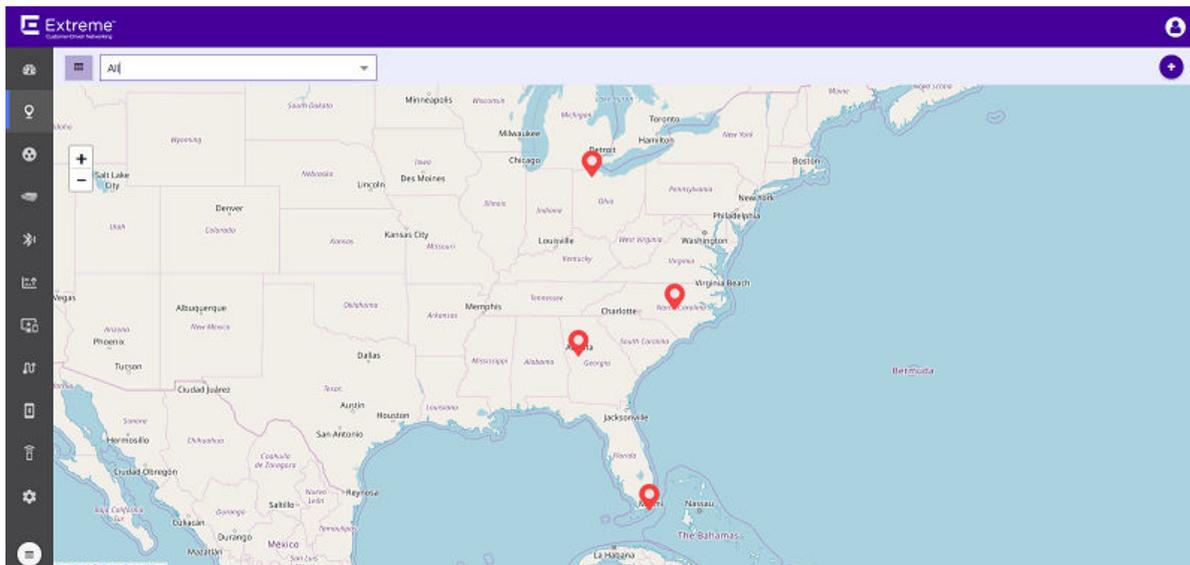1   Select **Maps** from the main menu.

The **Maps** screen displays.

Figure 13: Maps Screen

2   Use the **Map** view to locate your site and select it.

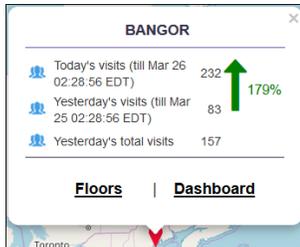The site's information is displayed in a small dialog.

Figure 14: Site Information Dialog

3   Select the **Floors** link on the pop-up.

The **Maps** screen displays a floor that is already configured for this site.
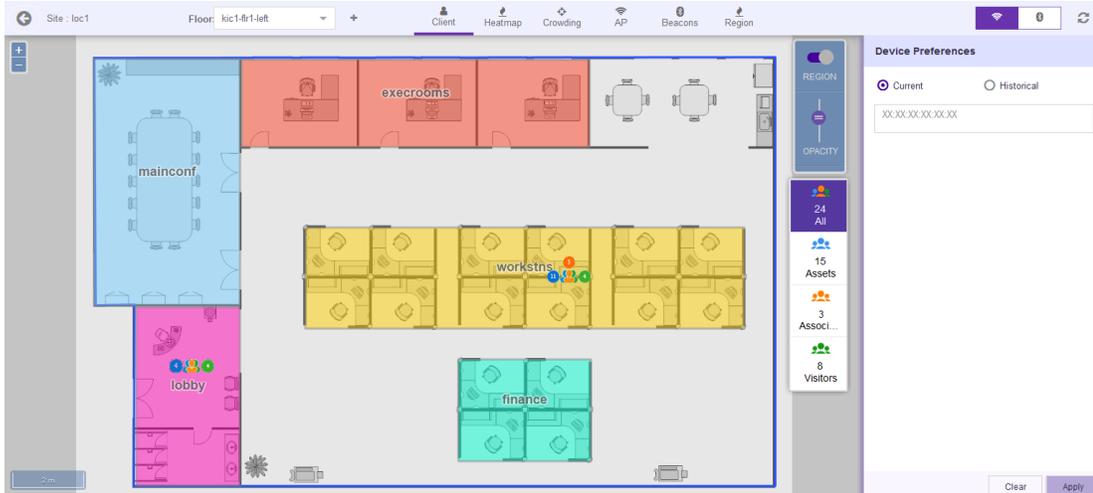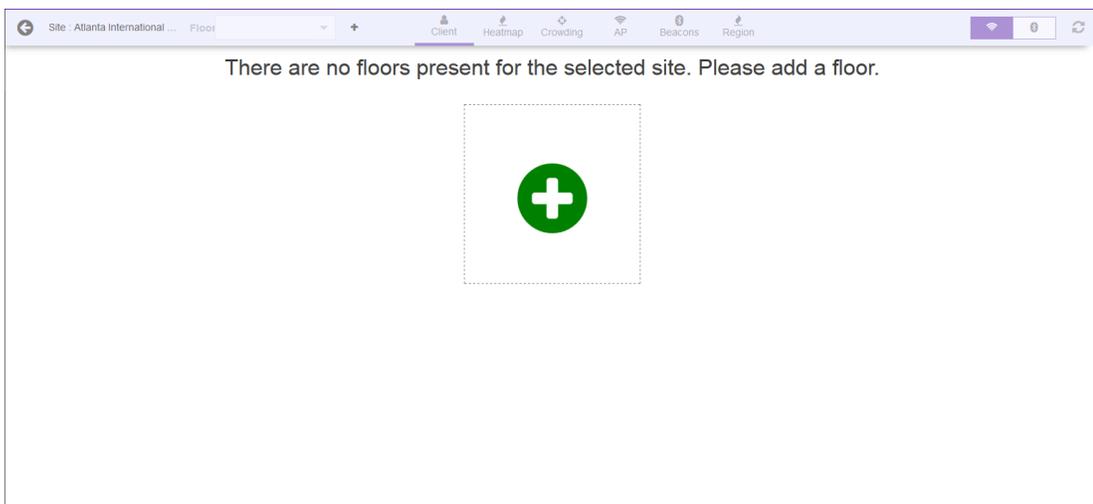
Figure 15: Floor Map

If no floors are configured, the **Maps** screen displays the following.

Figure 16: No Floors Configured

4   When the site has floors, use the [+] icon located to the left of the **Floors** drop-down list to add a new floor.

Figure 17: Add Floors Button

If the site has no floors, use the above [+] icon to add a floor or you can use the big green circle on the screen to add the new floor.
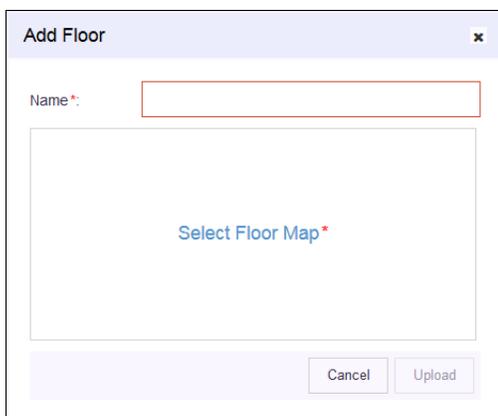
The **Add Floor** dialog displays.

Figure 18: Add Floor Dialog

5   Use the **Name** field to provide a name for this floor. The floor's name should be descriptive such that identifying the floor among other floors in the site becomes easier. This is a mandatory field.

6   Select the **Select Floor Map** label to add a floor map to be associated with this floor. You cannot add a floor without adding its floor map. This is a mandatory action.

The Operating System's **File Open** dialog displays. Use this dialog to navigate to the image file containing the floor's map and add it. A thumbnail of the floor map is added to the dialog.
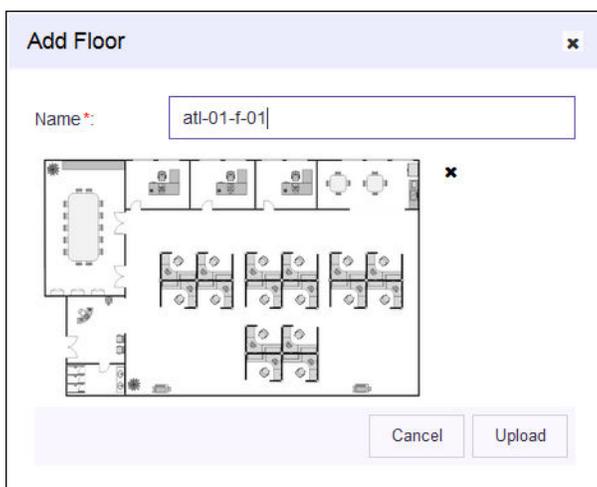

Figure 19: Floor Map Loaded

You can use the small 'x' located next to the thumbnail image to remove the floor map image from this dialog.

7   Select the **Upload** button to upload the floor map and create the new floor.

At any point of time, select the **Cancel** button to exit without creating the floor.

The new floor is created with the information provided in this dialog. The floor reloads and the following screen displays.
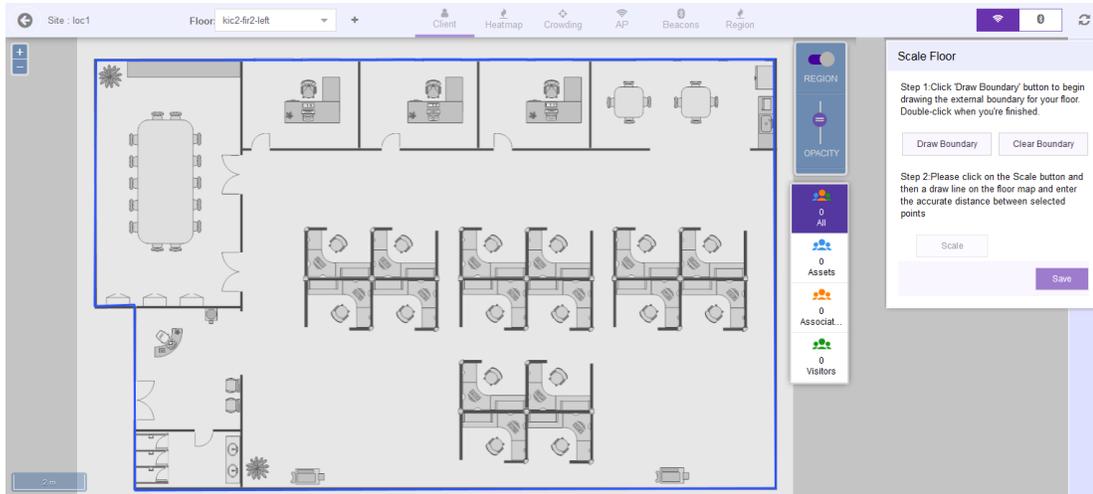

Figure 20: Scale Image Screen

8   In the Scale Floor dialog, select **Draw Boundary**. (The area within the boundary is used to determine device location.) To anchor the beginning of the boundary line, click a corner of the outside boundary. Click each corner to anchor the line. The drawing line zigzags across the image as you anchor each corner. When you reach the last corner (which is also your starting point), double-click the last corner to disable the pen tool.

The entire outside boundary is drawn and the **Scale** button is enabled.

> **Note**
> If you make a mistake, select **Clear Boundary** to remove the entire boundary and start over.

9   Select **Scale**. Choose two points on the floor map for which you know the actual physical distance. Click on the first point and drag your pointer to the other point.

> **Note**
> Proper scaling is fundamental to the accuracy of the location data for this site. Verify that the scaling information is as accurate as possible.

A line is drawn on the map between the two points.

10 Enter the physical distance value in the **Scale Floor** dialog.

Figure 21: Add Scaling

11 Select the **Save** button.

The dialog briefly displays the scaling factor. The scaling factor is also displayed at the bottom left of the **Floors** screen.
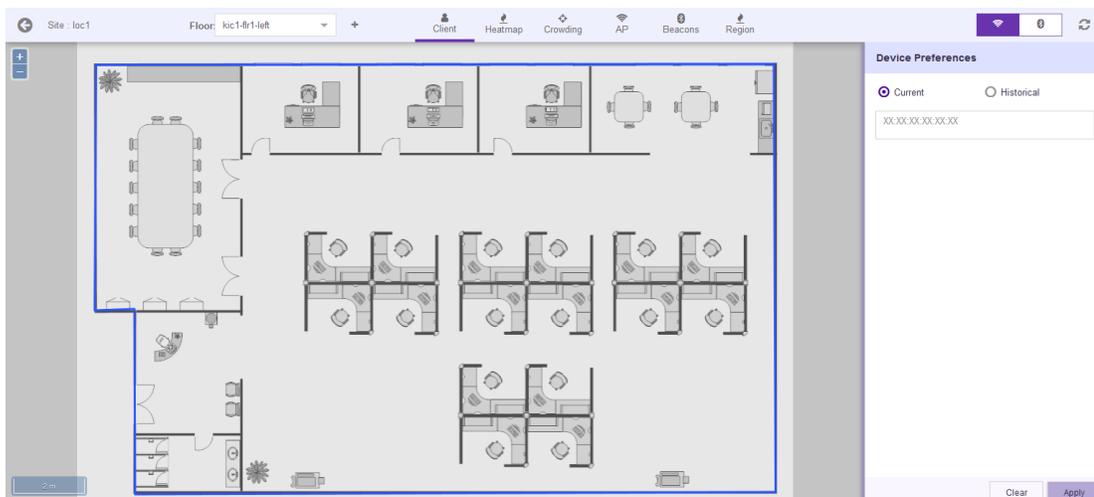

Figure 22: New Floor

Place Access Points

Access points provide the infrastructure for ExtremeLocation service. ExtremeLocation uses the access point's radio's sensor capability to provide the locationing and tracking services within its service area. Access points must be placed on a site's floor for viewing the visits and heat map for the floor.

Before any access point can be placed on the site's floor, it must be added to your site. You can add access points when creating the site. You can also add the access points to the site by editing the site's information. For more information on how to add or edit a site, see Add a Site on page 33.

To place an access point to the floor:

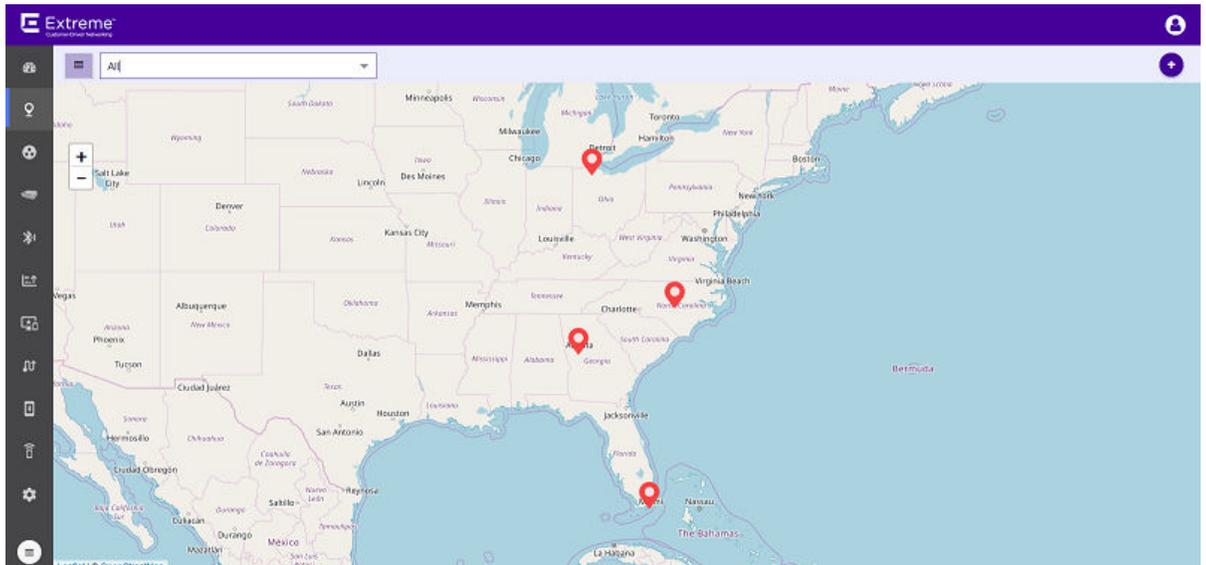1 Select **Maps** from the main menu.

The **Maps** screen displays.

Figure 23: Maps Screen

2 Use the **Map** view to locate your site and select it.

The site's information is displayed in a small dialog.
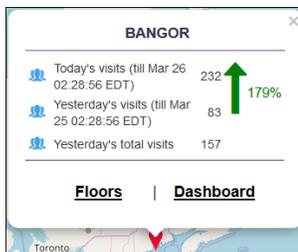

Figure 24: Site Information Dialog

3   Select the **Floors** link on the dialog.

The **Maps** screen displays the first floor for this site.
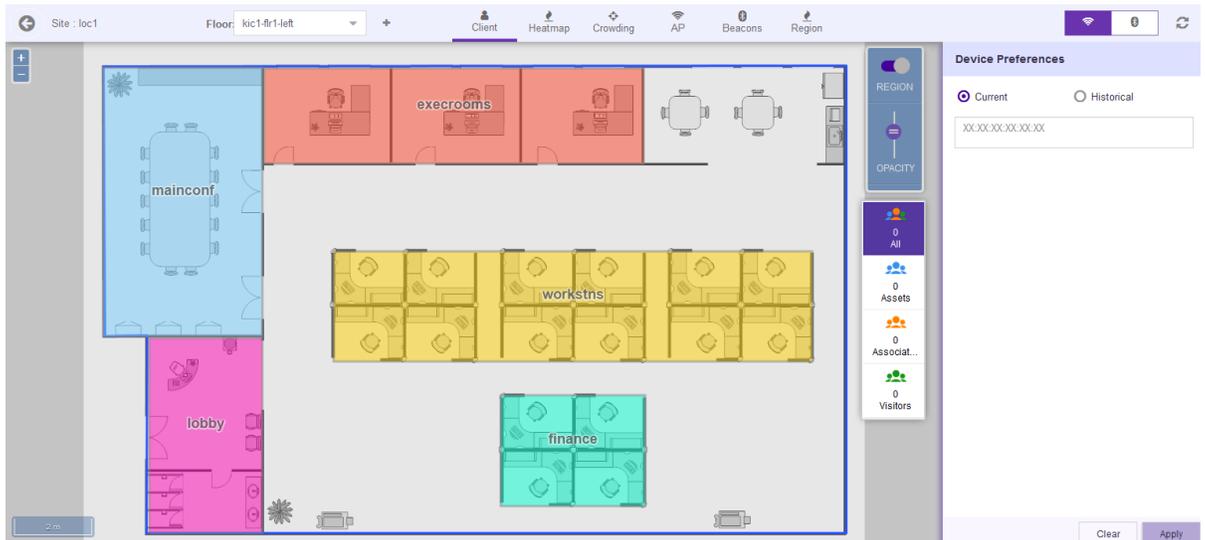
Figure 25: Floor Map

4

Select ![AP] icon from the ![toolbar icons] toolbar.

The following screen displays.
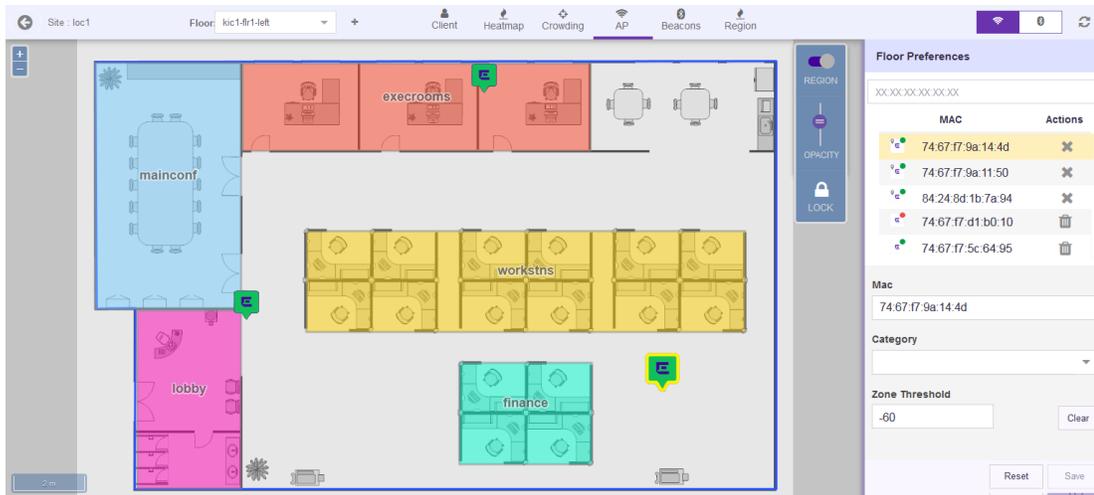
Figure 26: Maps Screen - Add Access Point

By default, the **Floor Preferences** area displays the **Access Points** assigned to this site.

5

Select the ![LOCK] icon to unlock the floor map.

You cannot place new access points without unlocking the floor map. By default, the floor map is

locked to prevent accidental relocation of placed access points. This icon then changes to ![LOCK] indicating that the floor map is unlocked.

6 From the list of access points, select an unplaced access point and drag it to its location on the floor map.

An unplaced access point can be identified by the ⬤ icon and will also have a Trash icon alongside it. Use the Trash icon to remove this access point from the list. Trashed access points will be available for re-deployment across all the sites for this ExtremeLocation account.

An access point placed on the floor map is identified by the ⬤ icon and will have a small 'x' icon alongside it. Use the 'x' icon to remove the access point. This access point can then be re-deployed to an another floor of this site.

⚠️ **Caution**
When re-deploying an access point, please note that all previous analytics data will be lost and cannot be recovered.

You can also select and drag an access point to a re-locate it to a different location on the floor.

Note
When an access point is placed on a floor map and is unable to contact the

ExtremeLocation server, its icon changes to 📍 .

By default, a placed access point is in a locked state and cannot be moved accidentally. To move an access point, you must first unlock the screen using the 🔒 icon. Please note that when you move a placed access point, you will lose all calibration data associated with the access point. This data cannot be retrieved.

7 If required, adjust the **Zone Threshold** value to meet the requirements of your deployment.

8 Select **Save** to apply the changes made to the access point screen.

At any point, use **Reset** to reset the values in these fields to their previous values.

Add a Region

Regions are locations on map that identify an area on a floor. For example, in a shop, the cosmetics aisle can be marked with the region 'Cosmetics'. Similarly, in an office, the area where the Accounts team is located can be marked with the region 'Accounts'. This segregation of the floor into logical regions enable you to get an idea of the visits in that particular region of the floor.

To create a region:

1   Select **Maps** from the main menu.

The **Maps** screen displays.

Figure 27: Maps Screen

2   Use the **Map** view to locate your site and select it.

The site's information is displayed in a small dialog.
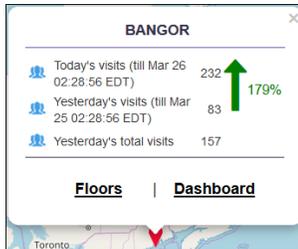
Figure 28: Site Information Dialog

3   Select the **Floors** link on the dialog.

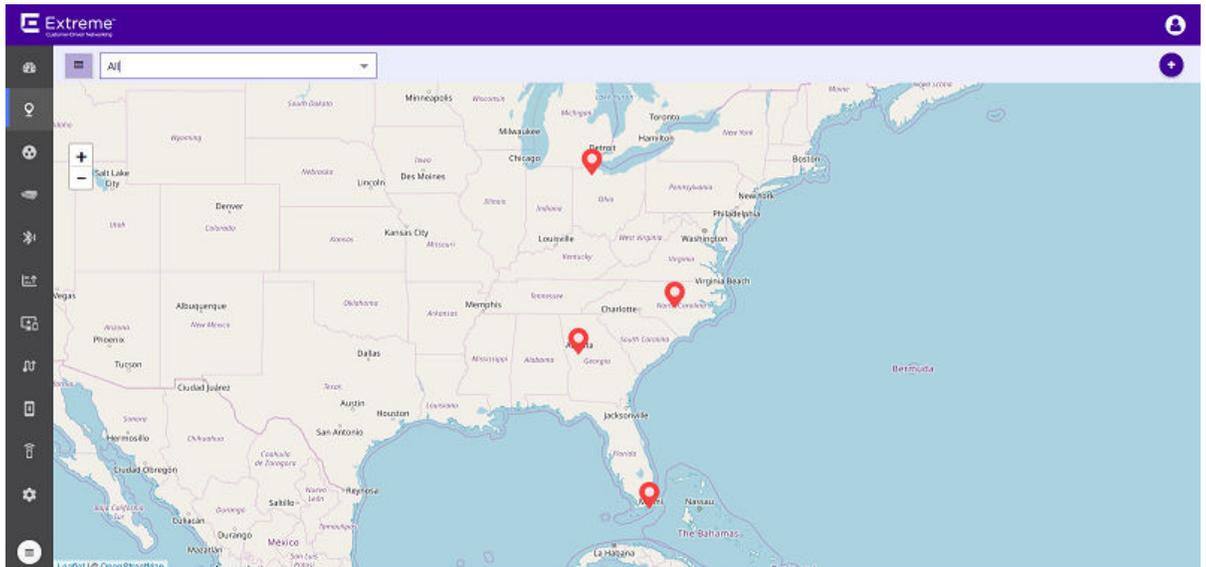The **Maps** screen displays the first floor for this site.
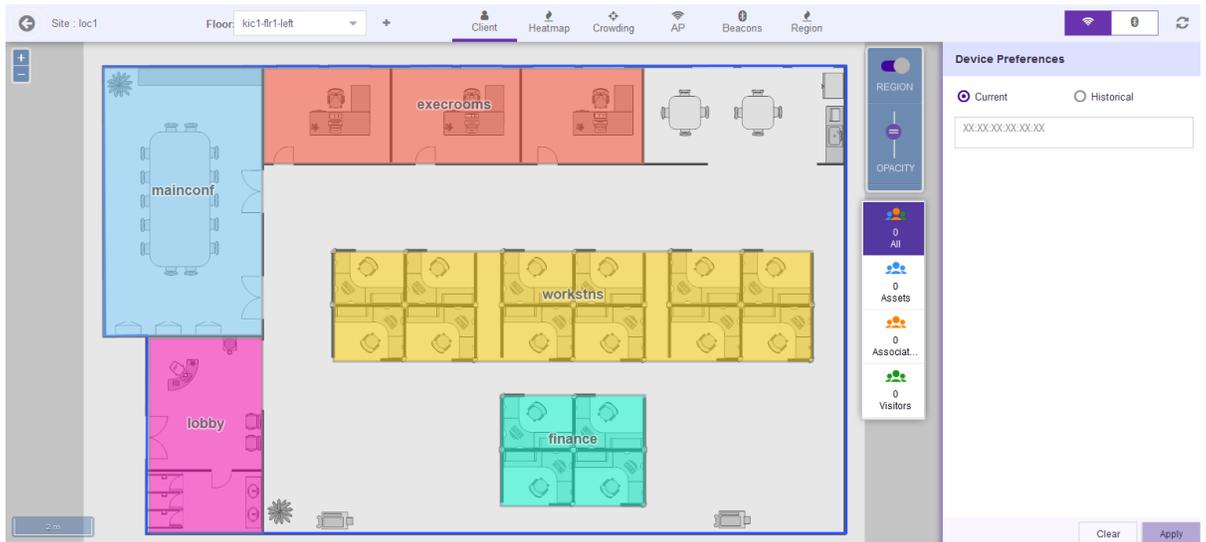
Figure 29: Floor Map

4   Select the [Region] icon from the [Client Heatmap Crowding AP Beacons Region] toolbar.

The following screen displays.
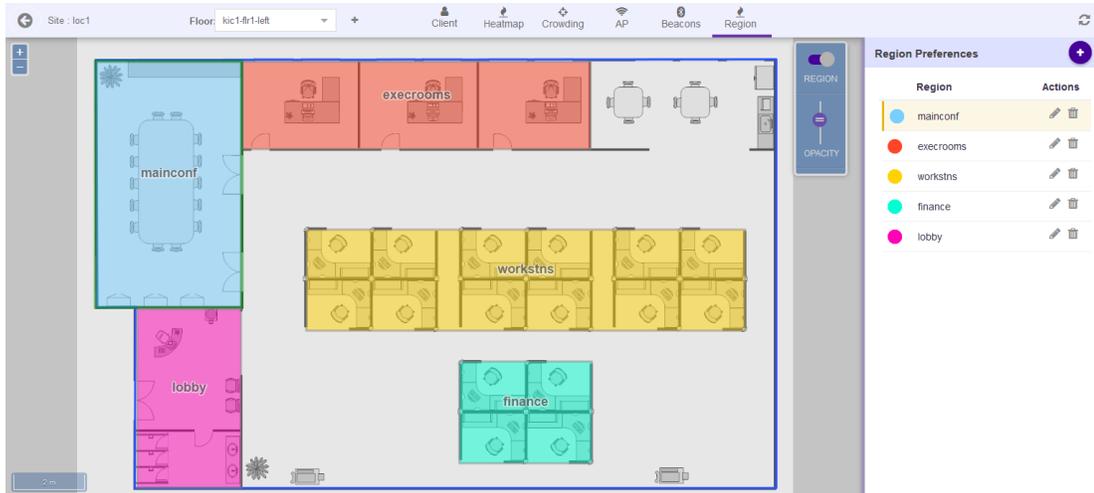
Figure 30: Regions Screen

By default, the **Region Preferences** area displays the regions created for this site.

5   Select the ⊕ icon to add a new region.

The following dialog display.

6   Use the **Region Name** field to provide a name for this region. The name should be such that you can identify this region among similar ones. This is a mandatory field.

7   Use the **Color** drop-down control to select a unique color for this region.

Selecting an unique color enables you to quickly identify a region in a floor with multiple regions. The following dialog appears.

Figure 31: Region Color Picker

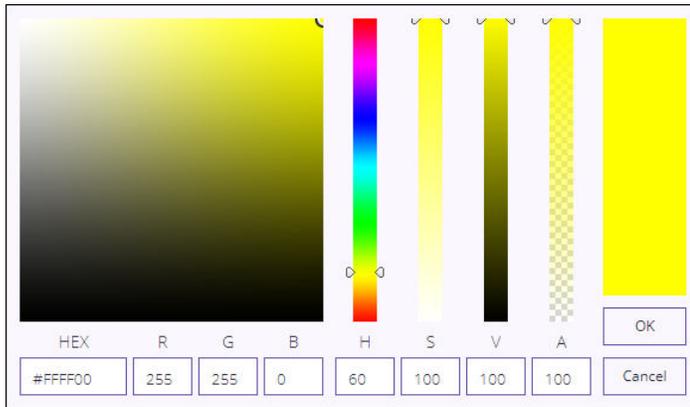Set the HEX, RGB, or the HSVA parameters to define your color. In this dialog, setting any value changes the values in the other fields to reflect the same color in their respective notations.

> ⚠️ **Attention**
> The "ALPHA" channel is not used when defining a region's color.

Select **OK** to set the selected color as the region's color. At any time, select **Cancel** to exit without setting the color.

The selected color is set as the region's color.

8   Select the region's **Category** using the drop-down list. When set, this category value has precedence over the category set on the access points that are placed in this region.

9   Draw a rectangular area on the floor map to mark the region.

A region is created and placed on the floor map.

10 Select **Save** to save the new region.

At any time select **Reset** to exit without creating a new region.

Step 6: Create your First Experience

Use ExtremeLocation's Experiences and Journeys to interact with your customers and guests. In ExtremeLocation, an experience is a way to interact with your guests that depends on the guest's location information as supplied by their Apps. For example, in a museum, you could play a short video of an exhibit when the guest moves near the exhibit. Or, in a retail environment, you could play an audio/video advertisement as soon as the visitor enters a particular department in your store.

In ExtremeLocation, the user interactive item delivered by an experience is known as a Payload. ExtremeLocation defines a large number of payloads types such as audio, video, URL, and a few other types. You can also use the payload (in the passive mode) to track your visitor flow in your location.

ExtremeLocation also provides another way to interact with your customer in a very special way using the concept of journeys. A journey is a set of experiences that the visitor must complete before the

payload configured for the journey is presented to the visitor. You could use the journey to run specific campaigns at your site that culminates in the visitor receiving special gifts on completing the journey. Or, for example, in a museum, you could trigger a Quiz at the end of the journey to reward the visitor.

Before you can create your first experience, you must define your payload for the experience.

Once you have created multiple experiences, you could combine these various experiences to create a journey for your site or ExtremeLocation account.

For more information on creating and managing experiences, journeys, and payloads, refer to the *ExtremeLocation User Guide*. This document can be downloaded from Extreme Networks Documentation Site.

About Experiences

An Experience consists of configuration that control what payload delivered, when it is delivered, and to whom it is delivered. You must configure the following parameters to successfully create an experience.

*   The experience's general information such as name and description.
*   The configurations for how many times the experience is delivered, whether the payload is delivered multiple times to the same visitor, and other parameters that control the actual triggering of this experience.
*   The configuration of the payload that will be delivered with this experience. Please note that you can associate only one (1) payload with each experience.
*   The configurations that configure the sites and the apps that can use this experience.
*   The configurations that you use to schedule the times when this experience is available for consumption by visitors.
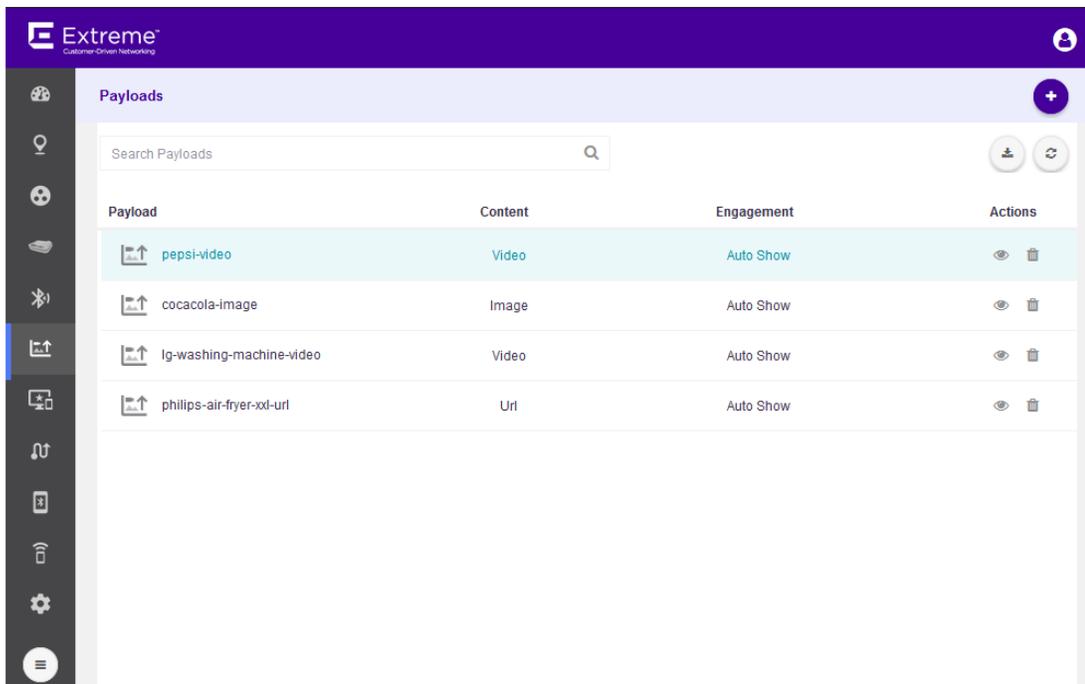
You must do the following to create and deploy an experience:

*   Create and configure a payload
*   Create and configure an experience
*   Associate the payload with the experience
*   Deploy the experience

Create a Payload

To create a new Payload:

1   Use the icon to load the **Payloads** screen.

    The **Payload** screen displays.

2 Select the ⊕ icon located to the top right of this screen.

The following **New Payload** screen loads.

For a new payload, provide the following information that identifies this payload.

Name   Provide a name for this payload. Payload name cannot be longer than 32 characters.

Description Provide a description for this payload. The description should be such that you can easily identify the purpose of this payload and its contents.

3 Select the **Settings** menu item to configure the payload's settings.

The following fields have to be configured for a payload:

Field	Description
Content Type	This field configures the type of the payload. The following payload types are available: • Passive — A Passive payload is an event without an action. Use this option for tracking events that happen and to collect data for analytics and for tracking movements. • Video — A Video payload delivers a video to the visitor when triggered. • Image — An Image payload delivers a simple image to the visitor when triggered. • Alert — An Alert payload displays an alert to the visitor when triggered. No more action is performed when this payload is triggered. • URL — Use this payload type to trigger other pages within the app or to re-direct the visitor to an external web page. • HTML — Use this payload to deliver a HTML5 formatted content to the visitor's mobile application. • Custom — The Custom payload enables you to customize the message to be delivered to the visitor. Use this payload type to deliver content that does not fit into any other category listed here. • Demo — Use the Demo payload type to indicate that the payload is for demonstration purposes only. **Note:** Depending on the **Content Type** you will be required to set more configuration parameters. These parameters can be different for different content types.
Engagement Type	The **Engagement Type** field configures when the payload is delivered to the visitor. The following types are available: • Passive — Use this type to indicate that the user engagement type is passive and no action need be taken on this payload. Use this option when you want to track the payload trigger event for analysis and other activities. This is the only option available when *Passive* is the selected **Content Type**. • Auto Show — Use this type to indicate that the payload must be delivered automatically when the conditions are met. There is no user interaction involved when *Auto Show* option is selected. This option is not available for the *Passive* and *Demo* **Content Types**. • Prompt — Use this type to indicate that the payload must be delivered only after the user agrees to receive the payload. When selected, a prompt is displayed to the user before the payload is delivered.

4 Select the **Save** button located to the top right of the screen to save the changes made to this payload.

Create an Experience

An Experience is used to deliver a payload when a set of conditions are satisfied. Use an experience to enhance the user's experience when visiting your site by providing targeted multimedia advertisements or coupons or other such information that are only active and valid in particular regions of your site.

An experience consists of various configuration options that control its following components. Each of these components can be modified independently of other configuration parameters. The experience's configuration parameters are broadly classified as:

- General Information — Configurations under this heading define the experience's name and description.
- Settings — Configurations under this heading define how many times the experience is delivered to the visitors.
- Payloads — Configuration under this heading define what is delivered to the visitors by this experience.
- Targeting — Configurations under this heading define the limits for this experience. Configurations under this heading controls whether the experience can be triggered through an App on the visitor's device or when the visitor visits a site. It also defines when the experience is triggered.
- Categories — Configurations under this heading define the Categories where this experience is used.
- Schedules — Configurations under this heading define the actual time duration and date range when this experience can be triggered. You can also configure particular days of the week when this experience can be triggered.
- Journeys — This is a view only configuration. To associate this experience with a journey, use the journey configuration screens.

The same screen is used to create or edit experiences. When a new experience is created, each configuration screen is populated with default values and you must edit each configuration screen individually.

When editing an existing experience, each configuration screen is populated with the its current values and you can modify each configuration screen individually.

Experiences are created and managed from ExtremeLocation's **Experiences** screen. Select the icon on the left of the main screen to load this screen.
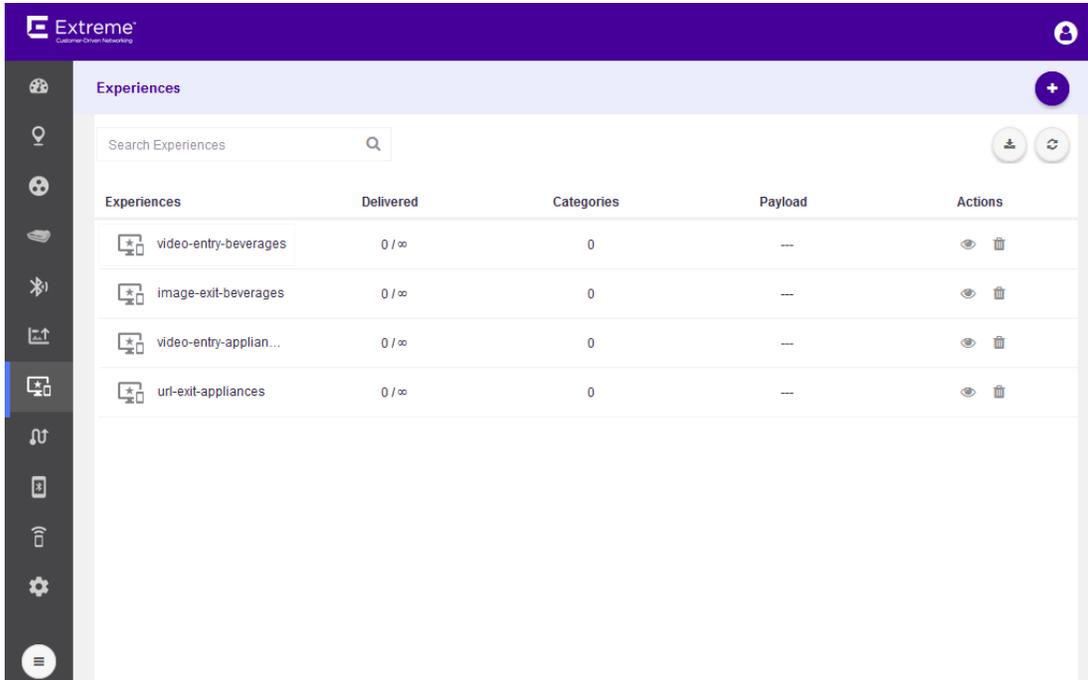
To create a new experience, select the icon located to the top right of the **Experience** screen.

Add General Information

When a new experience is created, the **General Information** screen displays.

To add the experience's details:

1   Provide the following information for the new experience.

Field	Description
Name	Provide a name for this experience. The name should be such that it identifies this experience uniquely among other experiences.
Description	Provide a detailed description for this experience. A detailed description could contain information such as the purpose of the experience, the payload it delivers, and other information that identifies the experience.

2   Select the **SAVE** button to save the changes made to this screen.

Add Settings

The **Settings** tab controls how the experience is delivered to the end user. This screen also controls how many time the experience is delivered and also the configuration of how this experience is delivered to a single user.
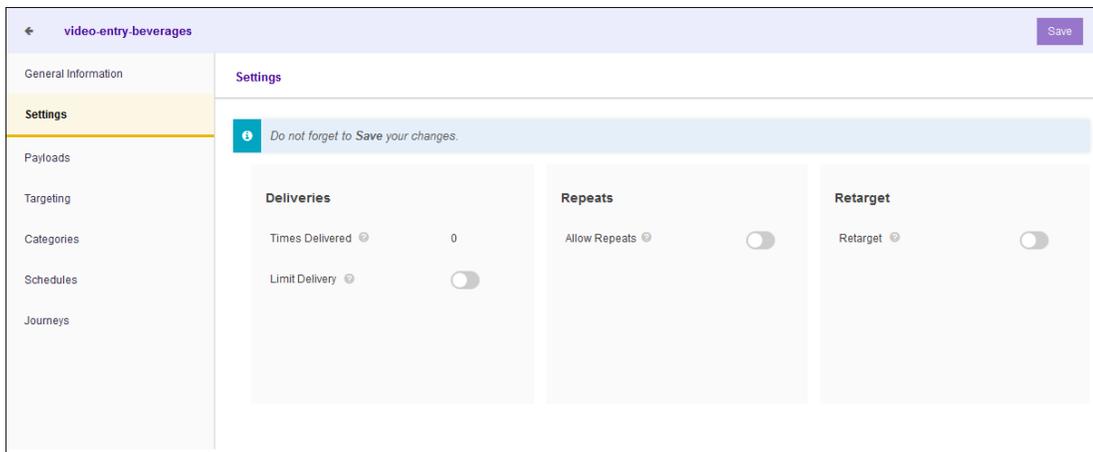

Note

If you had saved your changed in the previous screen, use the [icon] icon to edit this screen.

---

1   Select the **Settings** tab from the left menu tree.

The following screen displays.

2   Provide the following information for the **Deliveries** field:

Field	Description
Times Delivered	Displays the number of times this experience was delivered.
Limit Deliveries	Use this toggle button to enable or disable the number of times this experience is delivered. When set to *Off* there is no limit on the number of times this experience is delivered.
Maximum Allowed	Use the spinner to set the number of times this experience is to be delivered. When this value is exceeded, delivery of this experience is stopped. Depending on the configuration of the **Max Allowed Interval** field, delivery of this experience may be restarted.
Max Allowed Interval	Use this drop-down list to configure a time duration within which the experience is to be delivered. For example, if the value for this field is set to *Hour* and the value for the **Maximum Allowed** field is set to *5000*, then, a maximum of 5000 experiences can be delivered per hour. If, within an hour, all 5000 experiences are delivered, then no more experiences are delivered for the reminder of the hour. This counter is reset at the end of each hour.

3   Provide the following information for the **Repeat** field:

Field	Description
Allow Repeats	Use this toggle button to enable or disable repeat deliveries of the same experience to the same visitor. When set to *Off* the experience is not resent to the visitor.
Maximum Per User	Use the spinner to set the maximum number of times this experience's payload is delivered to the visitor.
Per User Interval	Use the spinner to set the time interval in minutes after which the visitor can start receiving the payload again. A visitor will not receive the same payload again within the above configured time value. For example, if the **Per User Interval** value is set at *2* and the **Maximum Per User** value is set at *3*, then the user will receive a maximum of three (3) payloads every two (2) minutes.

4   Provide the following information for the **Retarget** field.

Field	Description
Retarget	Use this toggle button to enable or disable how the payload is delivered.
Count	Use the spinner to set the number of times an experience need to be hit before its payload is delivered to the user.
Timespan	Use the spinner to set the time duration in minutes within which the number of hits configured in the **Count** field is reached. For example, if the **Count** value is set to *3* and the **Timespan** value is set to *2*, then the payload configured for this experience is only delivered if the experience is hit three (3) times within two (2) minutes.

5   Select the **SAVE** button to save the changes made to this screen.

Add Payload

The **Payload** tab sets the payload that is associated with this experience. You can add/modify/remove the associated payload from this screen.
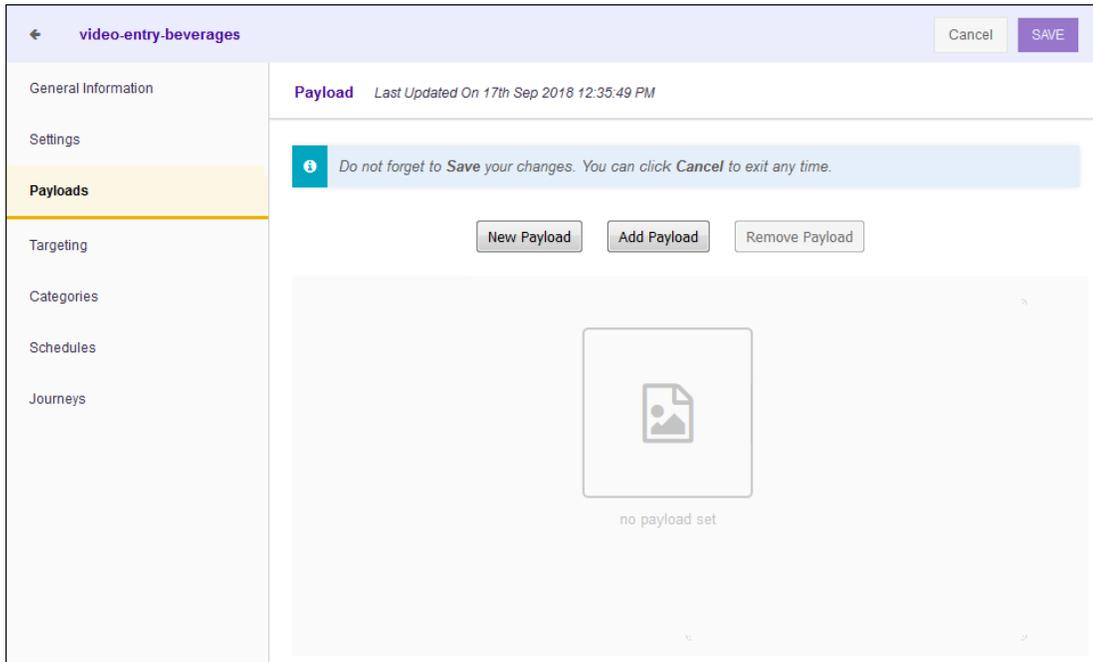
> **Note**
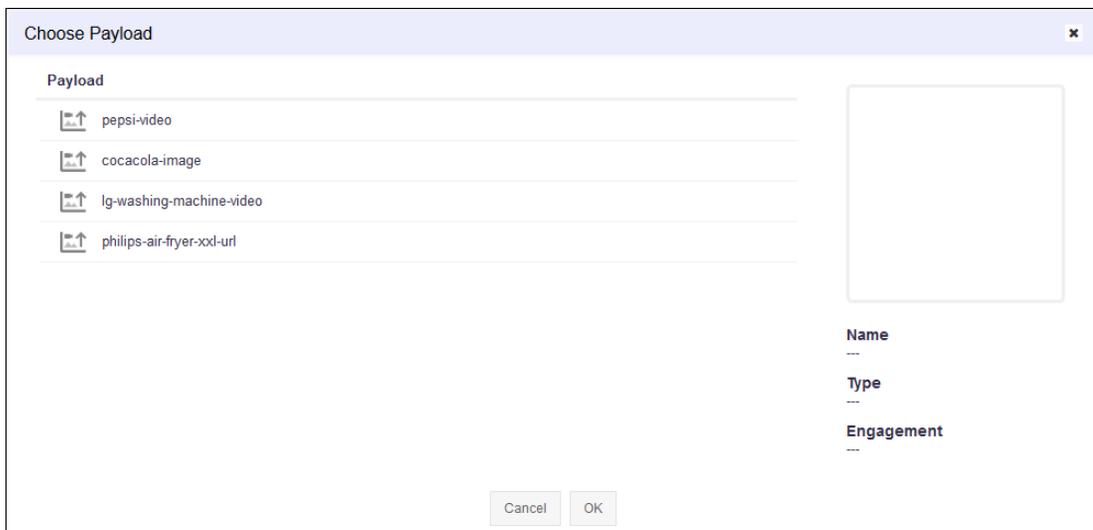> You can associate only one (1) payload with this experience.

> **Note**
> If you had saved your changed in the previous screen, use the icon to edit this screen.

1 Select the **Payload** tab from the left menu tree.

The following screen displays.

2 Use the **Add Payload** button to select an existing payload.
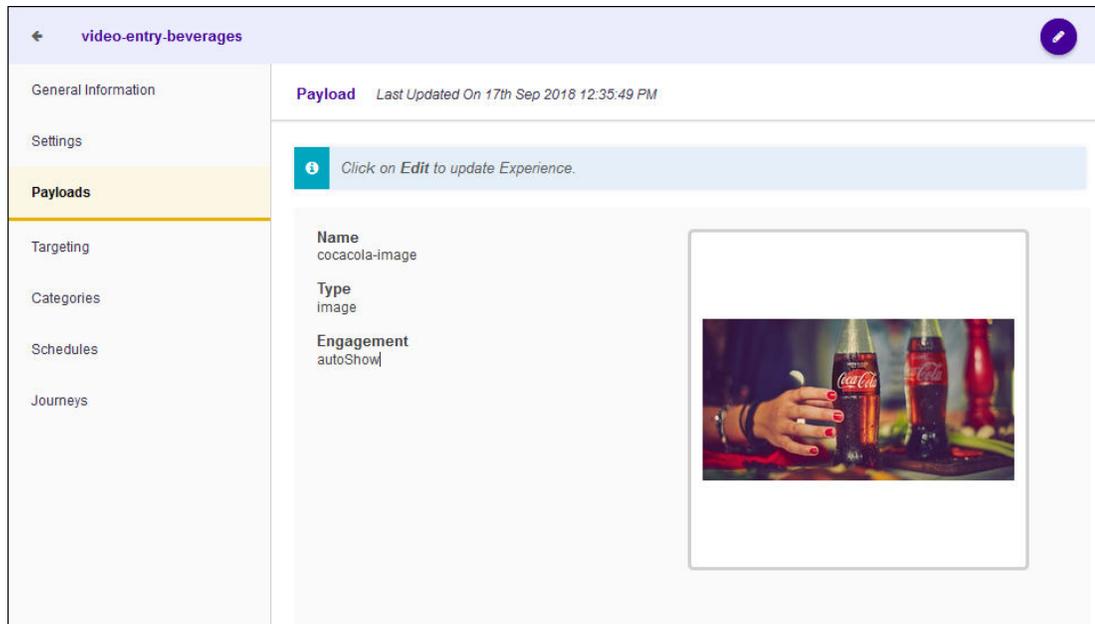
The **Choose Payload** screen displays.

3 Select the payload from the list to highlight it.

4 Select **OK** button to confirm your selection.

At any time use the **Cancel** button to exit without saving changes made to this screen.

The selected payload is added to your experience.

5 Select the **SAVE** button to save the changes made to this screen.

At any time select the **Cancel** button to exit without saving the changes made to this screen.

Add Targetting Information

> **Note**
>
> Before adding a site or an app to this experience, they must already be added to this ExtremeLocation account. You cannot add a site or an app using the **Targetting** screen.

The **Targetting** tab sets the configuration of which apps and sites can deliver this experience. You can use the same screen to prevent this experience from being delivered through certain apps or at certain sites.
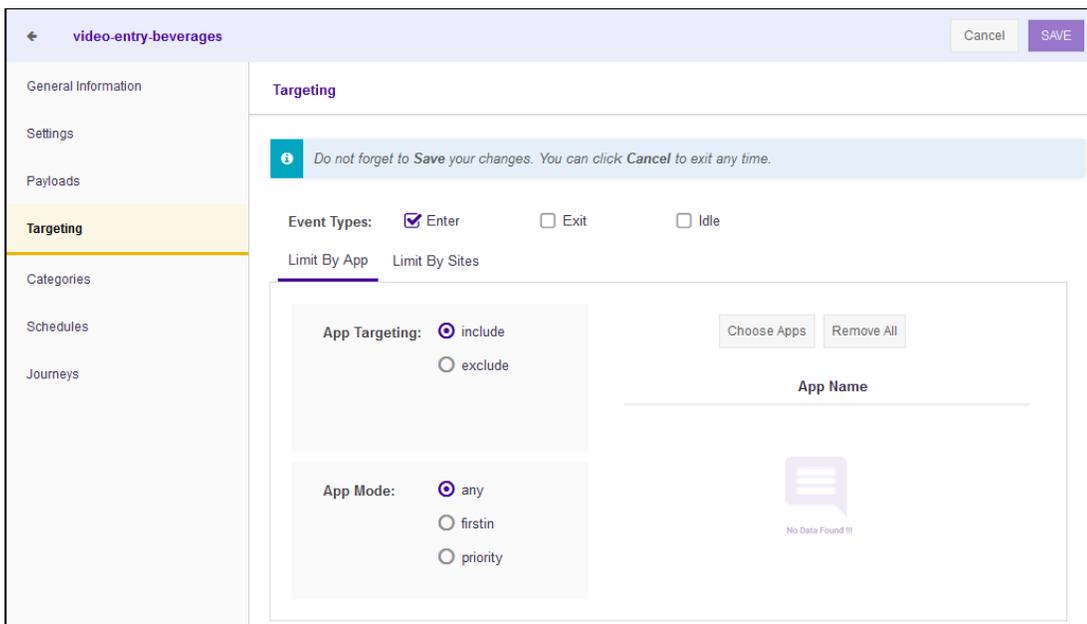
> **Note**
>
> If you had saved your changed in the previous screen, use the ✎ icon to edit this screen.

1   Select the **Targetting** tab from the left menu tree.

The following screen displays.

2   Provide the following information for the **Event Type** field:

Field	Description
Event Type	This field defines the event types that must occur for the experience to trigger. You can choose one or more of these values. • Enter Select this option to indicate that the experience is triggered for the *Enter* event. • Exit Select this option to indicate that the experience is triggered for the *Exit* event. • Idle Select this option to indicate that the experience is triggered for the *Idle* event.

3   Provide the following information for the **Limit By App** field:

Field	Description
App Targeting	Select *include* to indicate that the listed app can trigger this experience. Select *exclude* to indicate that the listed app cannot trigger this experience
App Mode	Select the **App Mode** value from *any* or *firstin*. • Any - Select this option to indicate that any app can trigger this payload. The payload can also be triggered multiple times depending on then number of apps listed. • firstin - Select this option to indicate that the payload will only be triggered once even if multiple apps are listed to trigger this payload. Once the payload has been triggered, it is not served again even if multiple apps have triggered the same payload. For example, assume that apps 'A', 'B', and 'C' are registered. The payload can only be triggered once. This can happen if it is triggered by any one of the apps. Once the payload is delivered, it is not delivered again even if other listed apps trigger the payload delivery.
Choose Apps	Use the **Choose Apps** button to add apps to this experience.
Remove All	Use the **Remove All** button to remove all apps mapped to this experience

4   Provide the following information for the **Limit by Sites** field:

Field	Description
Site Targeting	Select *include* to indicate that the listed Site can trigger this experience. Select *exclude* to indicate that the listed Site cannot trigger this experience
Choose Sites	Use the **Choose Sites** button to add Sites to this experience.
Remove All	Use the **Remove All** button to remove all Sites mapped to this experience

5   Select the **SAVE** button to save the changes made to this screen.

At any time select the **Cancel** button to exit without saving the changes made to this screen.

Add Categories

> **Note**
>
> Only existing categories can be added to this experience. You cannot create categories using this **Categories** screen.

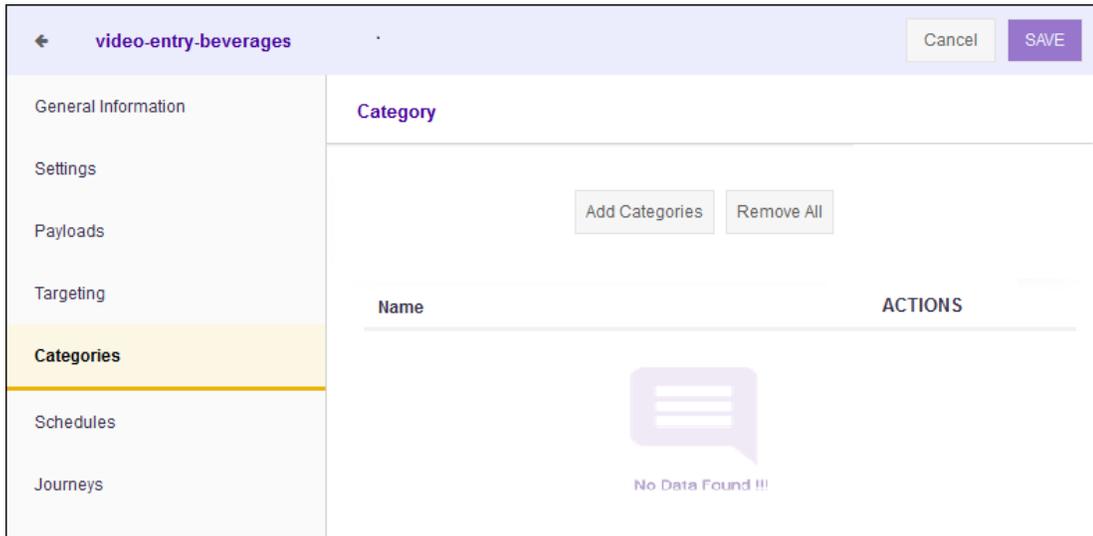The **Category** tab sets the categories that can trigger this experience.

> **Note**
>
> If you had saved your changed in the previous screen, use the ✏ icon to edit this screen.

1 Select the **Categories** tab from the left menu tree.

The following screen displays.

2 Select the **Add Categories** button to add more categories to this list.

3 Select the **Remove All** button to remove all configured categories from this experience.

4 To remove a single category from this experience, select the 🗑 icon under the **Actions** column for the category.

5 Select the **SAVE** button to save the changes made to this screen.

At any time select the **Cancel** button to exit without saving the changes made to this screen.

Add Schedules

A Schedule is a configuration that allows you to control when this experience is active. This configuration contains settings such as the dates when this experience can run, the allowed days of week, and the time range during the day when this experience is active.
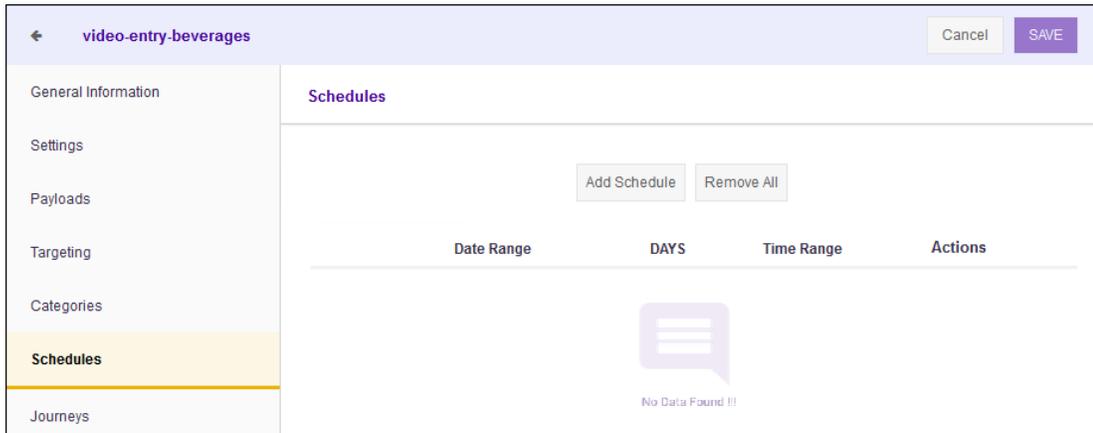

Note

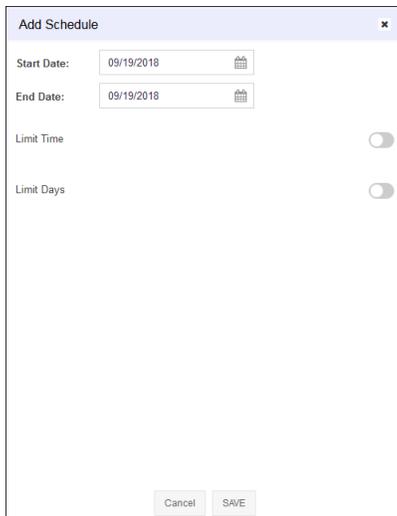If you had saved your changed in the previous screen, use the ✏ icon to edit this screen.

---

1   Select the **Schedules** tab from the left menu tree.

The following screen displays.

2   Select the **Add Schedule** button to add a schedule to this experience.

The **Add Schedule** screen displays.

Use the **Schedules** screen to configure the schedule. A schedule is a set of configurations consisting of a date range, a set of controls to restrict the time, and the days of week when this schedule can be run.
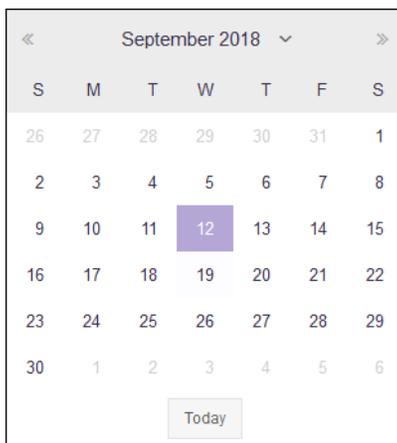
3   Select the 📅 icon inside the **Start Date** control.

A **Calendar** displays from where you can select the correct **Start Date** for this schedule.
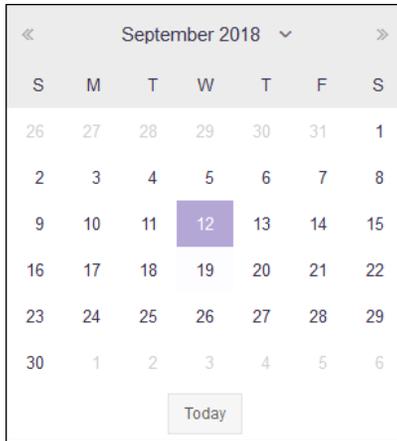
4   Select the ▦ icon inside the **End Date** control.

A **Calendar** displays from where you can select the correct **End Date** for this schedule.

5   Select the **Limit Time** switch to enable setting the time range when this schedule is considered active.

The **Start Time** and **End Time** controls are enabled.

6   Use the **Start Time** drop-down menu to select the schedule's start time. Start time can be configured with an accuracy of nearest half-hour.

For example, you cannot configure the start or end time to be 10:15 am. You must configure it to the nearest half-hour, either 10:00 am or 10.30 am.

7   Use the **End Time** drop-down menu to select the schedule's end time. End time can be configured with an accuracy of nearest half-hour.

For example, you cannot configure the start or end time to be 10:15 am. You must configure it to the nearest half-hour, either 10:00 am or 10.30 am.

8   Select the **Limit Days** switch to enable setting the days of the week when this schedule is considered active.

The **Days of Week** controls are enabled.

Select the appropriate days when this schedule is to be executed.

9   Select the **SAVE** button to save the schedule.

Select the **Cancel** button to exit without saving the changes made to this schedule.

10 From the main screen, select the **Remove All** button to remove all configured schedules for this experience.

11 To remove a single schedule from this experience, select the 🗑 icon under the **Actions** column for the schedule.

12 Select the **SAVE** button to save the changes made to this screen.

At any time select the **Cancel** button to exit without saving the changes made to this screen.

Step 7: Configure the ExtremeLocation Dashboard

Use the fully customizable ExtremeLocation Dashboard to display data for the sites managed by your ExtremeLocation account. ExtremeLocation provides a large number of widgets for you to use in the dashboard to filter to the data that is of interest for your site and your requirement. You can create any number of custom Dashboards to meet your requirements.

You can filter the data displayed on the dashboard by location or site group and further on the time duration of interest. These options, location and time, can be applied independent of each other. You can filter the data displayed on the dashboard based on the location or time or both.

Create a Dashboard

To create a new ExtremeLocation dashboard:

1 Select **Dashboard** from the main menu.
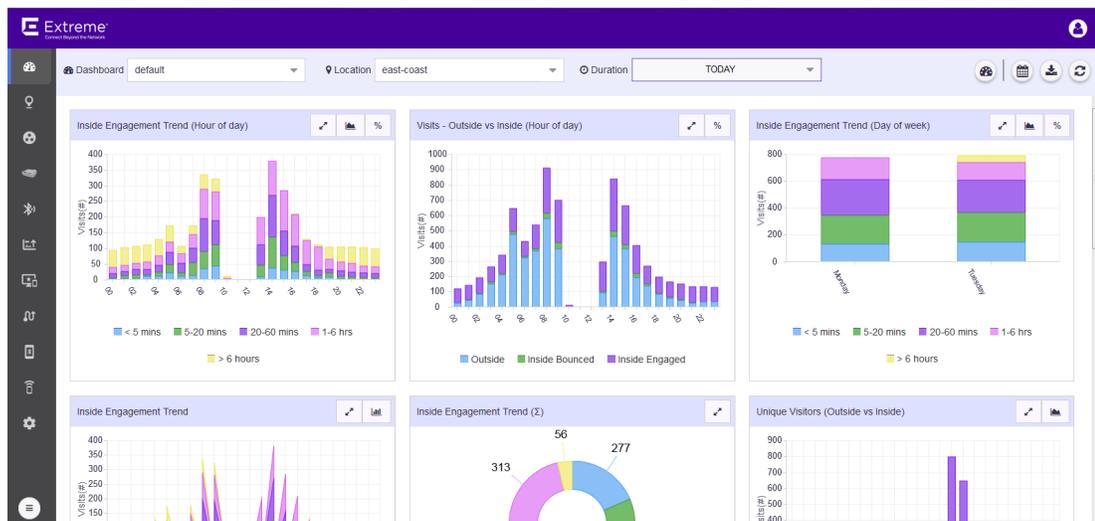
The dashboard marked as favorite automatically loads.

Figure 32: The Dashboard Screen

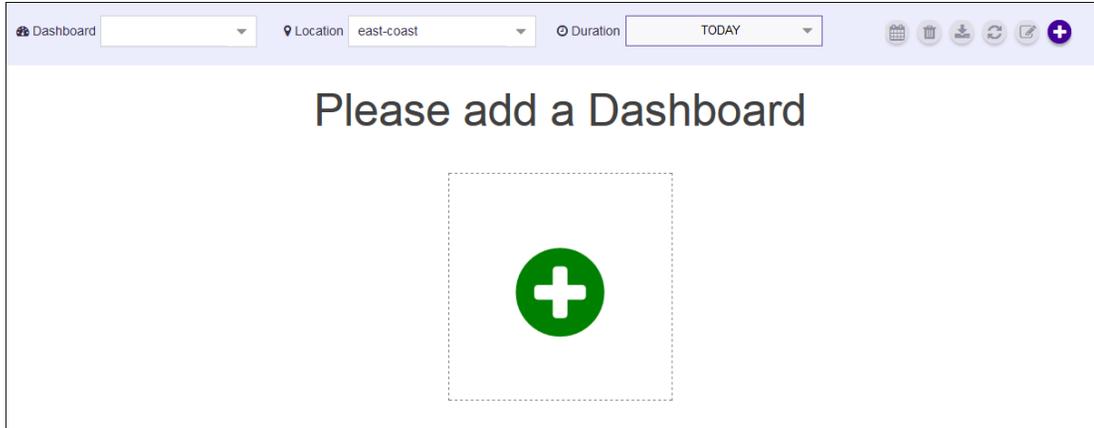If no dashboard exists, the following is displayed on the dashboard screen.

Figure 33: The Dashboard Screen When No Dashboard is Available

2   When no dashboard exists, click the big green circle in the middle of the screen to create a new dashboard.

3
    If dashboards are available for this account, select the button from tool bar.
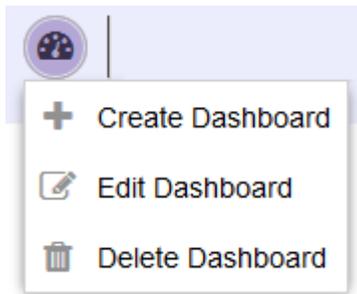
    The button expands to display a drop-down list.

Figure 34: Manage Dashboard Options

4   Select **Create Dashboard** from the drop-down list.

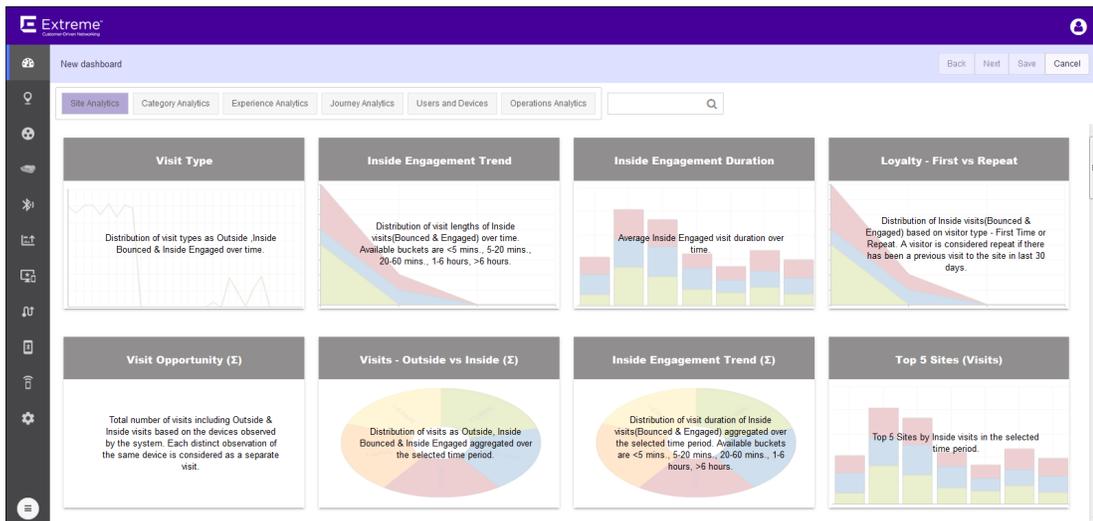The following **New Dashboard** screen displays.

Figure 35: New Dashboard Screen

5   Select one of the available widget categories.

Widgets on the **New Dashboard** screen are classified into:

- **Site Analytics** - Use the widgets in this category to display site analytics data.
- **Category Analytics** - Use the widgets in this category to display category/zonal analytics data.
- **Experience Analytics** - Use the widgets in this category to display experience analytics data.
- **Journey Analytics** - Use the widgets in this category to display journey analytics data.
- **Users and Devices** - Use the widgets in this category to display analytics about users and their devices.
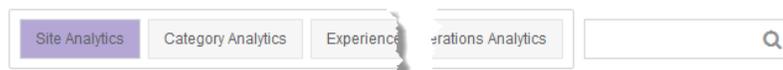- **Operation Analytics** - Use the widgets in this category to view operation analytics data.

Figure 36: Widget Categories

Use the **Search** text box to drill down to the widgets of interest.

6 Click the widget to select it. You can select multiple widgets to add to the dashboard at a time.

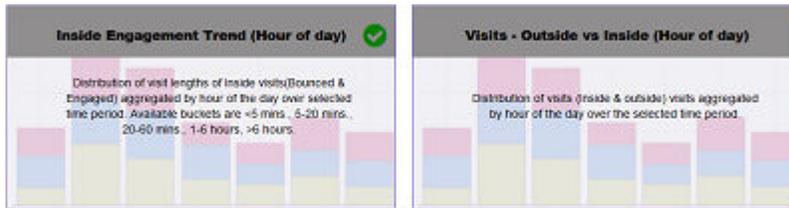A green check mark appears on the top right of the selected widget.

Figure 37: A Selected and an Unselected Widget

> **Note**
> Each ExtremeLocation dashboard can contain a maximum of 12 widgets. The dashboard can contain widgets from the different widget categories.

7 Select **Next** located to the top right, above the **New Dashboard** screen.
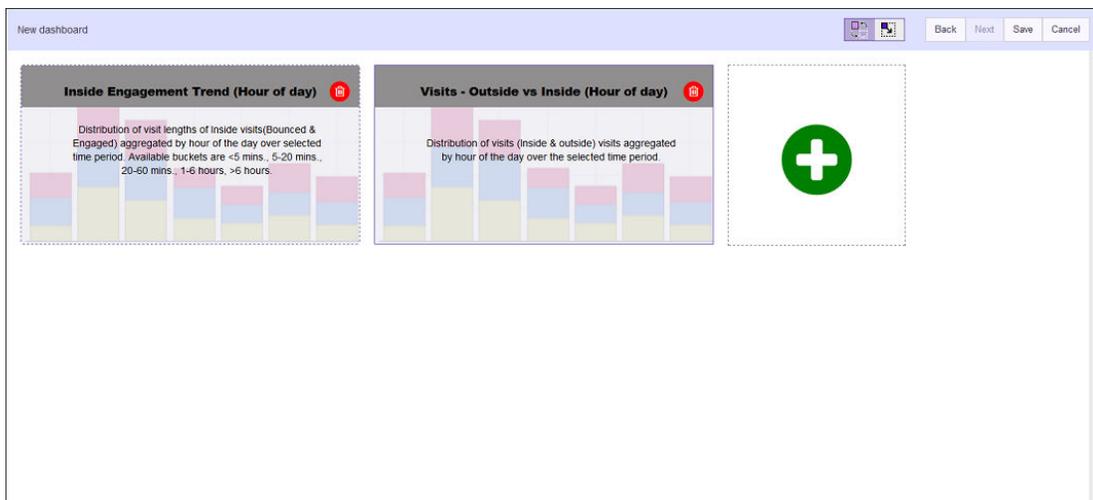
The following screen displays:

Figure 38: New Dashboard screen - Widget Placement and Sizing

To remove a widget already placed on the dashboard, use the ![icon] icon located to the top right of each widget. Selecting this icon immediately removes the widget from the dashboard.

8 Use the ![icons] buttons to rearrange or re-size the selected widgets on the new dashboard.

To rearrange the widgets, select the ![icon] icon. This is the default selection. Select a widget and drag it to the desired location on the dashboard. The other widgets on the dashboard are automatically rearranged to accommodate the moved or re-sized widget. To re-size a widget, select the ![icon] icon. A small triangle appears in the bottom right of each widget. Click and drag this triangle to re-size the widget.

9 Select **Save** to save the final dashboard layout.

At any time use **Back** to navigate to the previous screen. Similarly, use **Cancel** to exit without creating the dashboard.

A small window appears.

Figure 39: Name the New Dashboard

10 Provide a name for this dashboard and select **Save**.

The dashboard is saved and displays the configured data.

Load the Dashboard

To display the ExtremeLocation dashboard:

1 Select **Dashboard** from the main menu.

The dashboard marked as default automatically loads.
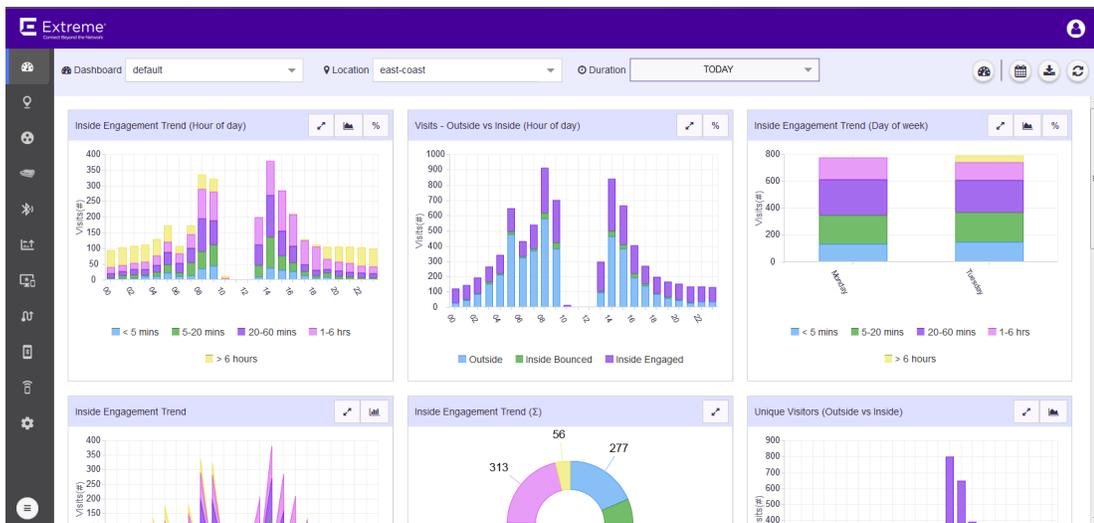

Figure 40: The Dashboard Screen

2 To select a different dashboard, use the **Dashboard** drop-down list.

The selected dashboard opens and displays the configured data.

3

To manually refresh the data on the screen, select the 🔄 button from 🎛️ 📅 ⬇️ 🔄 tool bar.

4

Select the ⬇️ button from 🎛️ 📅 ⬇️ 🔄 tool bar.

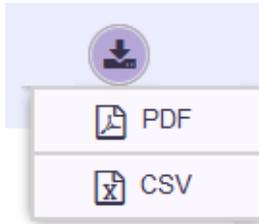The button expands to display a drop-down list.

Figure 41: Dashboard Download Options

5 Select the **PDF** button to save the current state of the dashboard as a Portable Document Format (PDF) file. Select the **CSV** button to save the current state of the dashboard as a Comma Separated Value (CSV) file.

6 Use the **Location** drop-down list to select a site and to display the data for the selected site when multiple sites are available under this ExtremeLocation account.
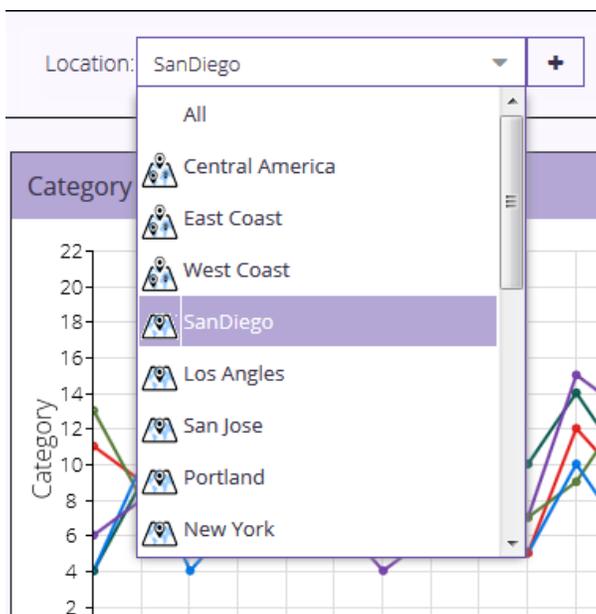

Figure 42: Location Drop-Down List

The dashboard refreshes to display data for the selected site or a group of sites.

7 Use the **Duration** drop-down list to select a time duration to display data for.

The drop-down provides a set of pre-configured durations for filtering data. The available pre-configured durations are:

- Today - Displays the data for the current date. Excludes data for all other dates.
- Yesterday - Displays the data for the day before the current date. Excludes data for all other dates including data for the current date.
- Last 7 Days - Displays the data for the last 7 days prior to the current date. Includes data for the current date. Excludes data for all other dates.
- Last 30 Days - Displays the data for the last 30 days prior to the current date. Includes data for the current date. Excludes data for all other dates.
- Custom Range - Displays the data for a user selected date range.

Select the start date and end date for the custom range from the displayed calendar and select **Apply**.

- - Displays the data for user created "Event" such as a sale or a conference. An Event is a user created date range that is identified with an unique name.

Use the drop-down to select the event of interest and select **Apply**.

8 Periodically select the ⟳ button from [icons] tool bar to refresh the data displayed on the current dashboard.

Dashboard Widgets

Widgets are used to display the data of interest from a site's locationing data on the dashboard . Widgets on the **New Dashboard** screen are classified into:

- **Site Analytics** - These widgets display site analytics data.
- **Category Analytics** - These widgets display category analytics data.
- **Experience Analytics** - These widgets display experience analytics data.
- **Journey Analytics** - These widgets display journey analytics data.
- **Users and Devices** - The widgets under this category display analytics about users and their devices.
- **Operation Analytics** - These widgets display the operational status for this ExtremeLocation account.
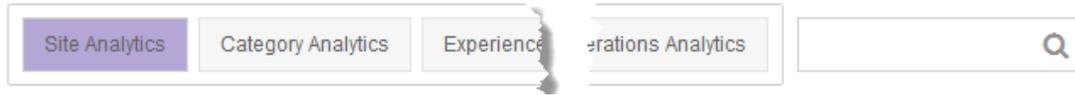
Figure 43: The Widget Categories

Use the **Search** text box to drill down to the widgets of interest.

Step 7 (Optional): Device Classification

Devices are classified into one of the following types:

- Assets
- Associates
- Visitors
- Associate Personal Devices

Devices are classified as `Visitor` when they are identified for the first time at the ExtremeLocation site. This is the default behavior.

Once a device has been classified as `Visitor`, the device is monitored for further classification. Some of the parameters used for device re-classification are the SSID to which the device associates and the time duration the device is seen at a site. Both these parameters are user configurable and are used to fine tune device classification.

ExtremeLocation also classifies personal devices of Associates as a separate category. Use this classification to ignore any data for these personal devices from any analysis and from being displayed in Client View on the floor map.

Device Classification Types

- **Assets**: Devices such as access points, POS, that are considered as an organization's assets are classified under this device classification.
- **Associates**: Devices such bar-code scanners, RFID readers, mobile phones that an associate carries on person and uses to perform specific task or tasks related to the Associate's job function are classified as `Associates`.
- **Visitor**: This is the default classification applied to any device that is seen at the site for the first time. Generally, this classification applies to any device that is carried by any customer or vendor visiting the site. Depending on other conditions, a device is re-classified to one of the other types from this classification.
- **Associate Personal Device**: This is a special classification reserved for those device that an `Associate` carries for personal use and which are different from those devices that is used for carrying out official tasks. You can choose to ignore devices that are classified in this type from being included in any analytics.

Configuring Device Classification

Device Classification Types

- **Assets**: Devices such as access points, POS, that are considered as an organization's assets are classified under this device classification.
- **Associates**: Devices such bar-code scanners, RFID readers, mobile phones that an associate carries on person and uses to perform specific task or tasks related to the Associate's job function are classified as `Associates`.
- **Visitor**: This is the default classification applied to any device that is seen at the site for the first time. Generally, this classification applies to any device that is carried by any customer or vendor visiting the site. Depending on other conditions, a device is re-classified to one of the other types from this classification.
- **Associate Personal Device**: This is a special classification reserved for those device that an `Associate` carries for personal use and which are different from those devices that is used for carrying out official tasks. You can choose to ignore devices that are classified in this type from being included in any analytics.

Note

Device classification is not applicable to App User devices.

Device Classification can be performed automatically or manually. To configure device classification:

1   Select **Settings** > **System Settings** > **Device Classification**.

The **Device Classification and Management** window opens. This window displays the device classification rules configured for this ExtremeLocation account.
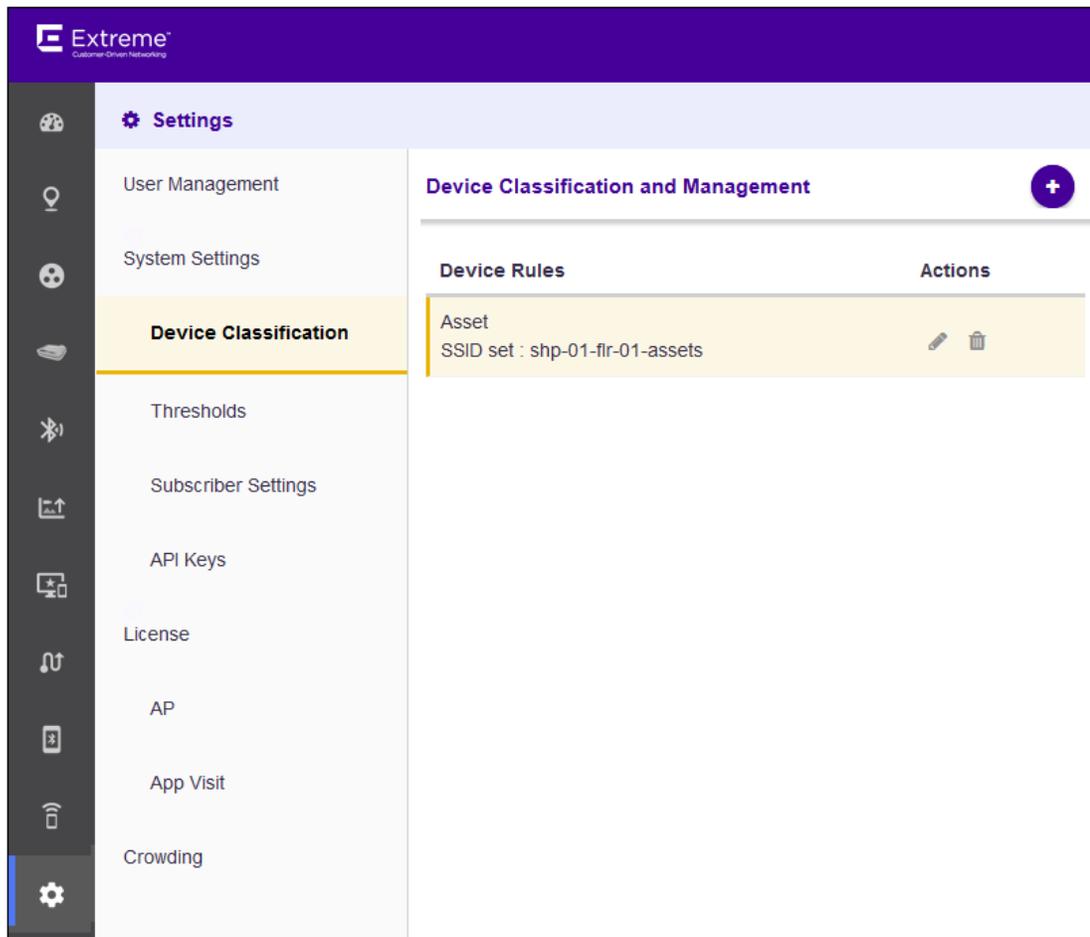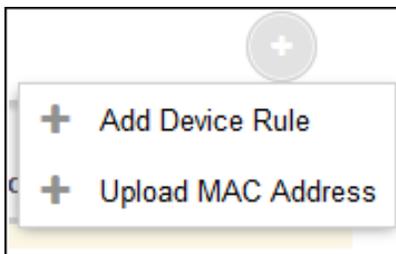

Figure 44: Device Classification and Management window

2   Select the ⊕ icon. The following menu displays.

3 Select the **Add Device Rule** menu item to add a new **Device Classification and Management** rule. The **Configure Rule** screen displays.

4 Configure the following to create a device classification rule:

Select Visitor type	Use the drop-down list to select the appropriate visitor type. The following options are available: • Asset • Associate • Associate Personal Devices

> **Note**
> You can create one rule per visitor type. Once a rule for a visitor type is created, it is no longer available as a selection in this drop-down list.

|	
Provide SSID	Devices are classified based on the SSID that the device associates itself to at the site.
Visitor Duration	Devices are classified based on the duration the device remains at the site.

5 Select **Provide SSID** to classify devices based on the SSID that the device associates itself to at the site.

When classifying devices using SSIDs, you must manually provide the SSID that is used for the classification. Use the [+] button to add SSIDs manually. The following field appears when you select the button.

Enter a valid SSID into the **SSID** field and select **Add** to add the entered SSID to the list. Then, select the appropriate SSID from the **SSID** drop-down list to create your classification rule.

6   Select **Visitor Duration** to add a rule that classifies a visitor based on the length of time the visitor stays in the site.
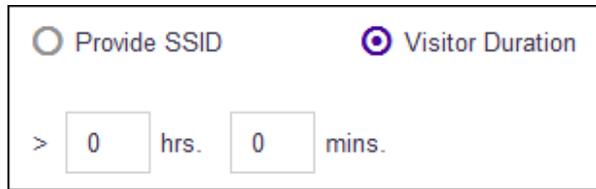

Use the fields to set the minimum duration in hours and minutes the visitor needs to spend inside the site for it to be classified automatically.

7   Select **Save** to save the changes made to the **Device Classification** parameters.

At any time, select the **Reset** button to revert the changes made to the device classification parameters.

8   Select the ⊕ icon. The following menu displays.
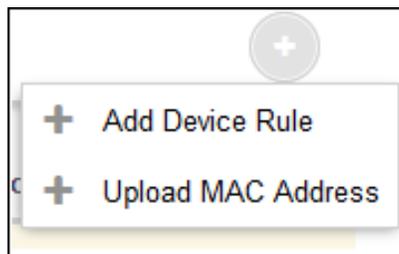
9   Select **Upload MAC Address** menu item to add a list of device MAC addresses.

The **Upload MAC** screen displays.
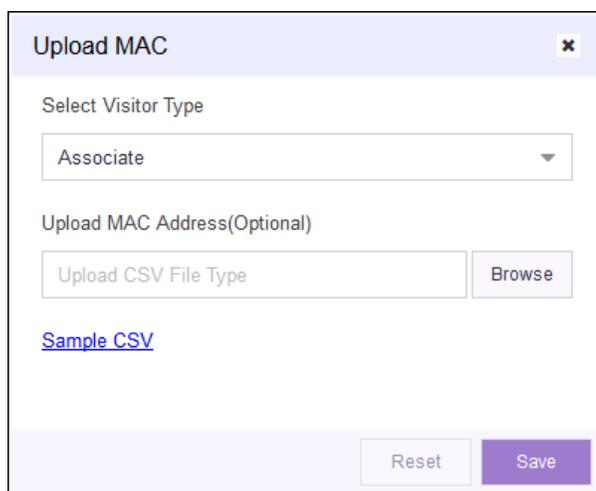
10 Use the **Select Visitor Type** drop-down list to select the visitor type for the devices in this list.

11 Use the **Browse** button to search for and upload a *Comma Separated Value* file to the ExtremeLocation account.

Use the **Sample CSV** link to download a sample file to base your manual device classification data CSV file.

12 Select **Save** to save the changes made to the **Device Classification** parameters.

At any time, select the **Reset** button to revert the changes made to the device classification parameters.

Device Classification Rules

ExtremeLocation allows classification of the devices seen by it into the following categories:

- Assets
- Associates
- Visitors
- Associate Personal Devices

The classification happens according to the following rules:

1 Any device classified manually using imported `csv` file is classified as such immediately.
2 Any devices with Extreme, Symbol, or Motorola OUIs are marked as Assets first. These devices are subject to reclassification when other rules are run later.
3 Associate Personal Devices are disabled by default. When Associate Personal Device support is enabled, any device classified as Associate Personal Devices has a priority lower than devices classified as Assets or Associates. Moreover, any device already classified as either Asset or Associate is not classified again as Associate Personal Devices.
4 Classification rules are run when a device enters a site or exits it. When a device visits a site for the first time, it is always classified as a `Visitor` device. When the device exits the site, it is reclassified based on the following rules which set the priority of the device as:
    - When Associate Personal Devices is enabled, the priority is as follows, Associate > Asset > Associate Personal Devices > Visitor.
    - When Associate Personal Devices is disabled, the priority is as follows, Associate > Asset > Visitor.
5 The rules for classification as Associate Personal Devices are:
    - The device is seen in the environment (site) for more than 4 hours
    - On site exit, the device is not classified as an Asset or Associate either through manual classification or through configured rules.