



Zmachine[®] Synergy

Client Software: Installation and Account Creation
Version 1.0

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Introduction

The Synergy Client Software is a Windows application that facilitates using data acquired on the Zmachine Synergy device. Its functions include:

- Managing and viewing Zmachine Synergy user information and billing history
- Uploading new study data from the Zmachine Synergy to General Sleep Server
- Sending uploaded data to other users of the Synergy Client Software for scoring and/or interpretation
- Viewing and Scoring of uploaded data
- Generating reports for scored data based on customizable report templates

This Document describes the process for downloading and installing the Synergy Client Software, and how to set up a free user account.

Requirements

The Synergy Client Software requires:

- An internet connection
- A PC running Windows 10 or Windows 7
- A USB Port if data is to be uploaded from a Zmachine Synergy

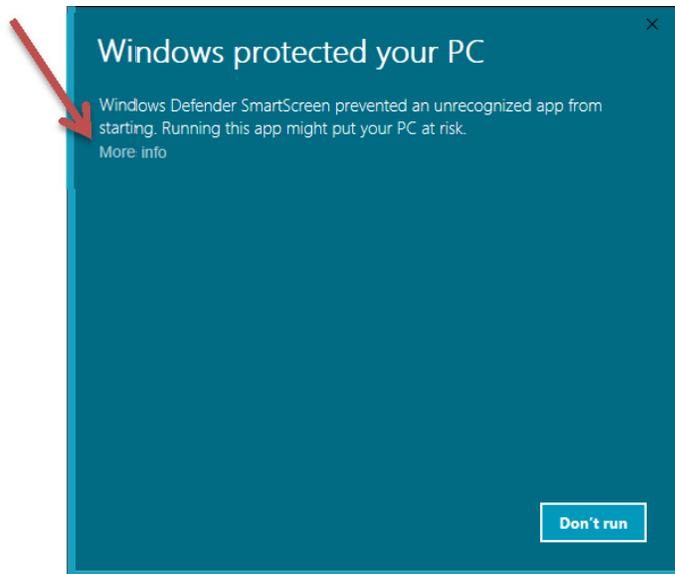
Downloading the Synergy Client Software

The Synergy Client Software can be downloaded from the General Sleep Corporation website, at:

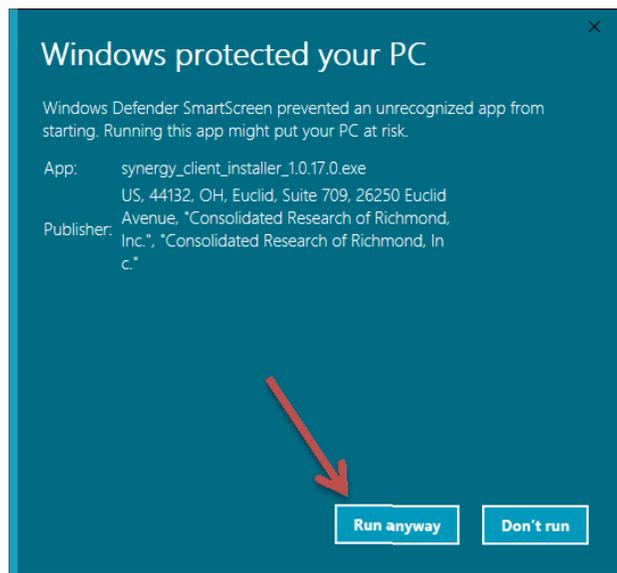
<http://generalsleep.com/synergy.html>

The procedure for downloading a file will differ based on what browser software you use (Edge, Internet Explorer, Firefox, Chrome, etc.). Generally, the procedure is to clicking on the link to the Synergy Client Software, and your browser will open a dialog asking if you want to save the file. Once the file has been downloaded, select it from the downloads list in your browser to execute the installation program.

Depending on your Windows version, you may get a window indicating that Windows Defender SmartScreen has prevented an unrecognized app from starting. If you see this message, select the “More info” link, and you can verify that the application Publisher is “Consolidated Research of Richmond, Inc..”

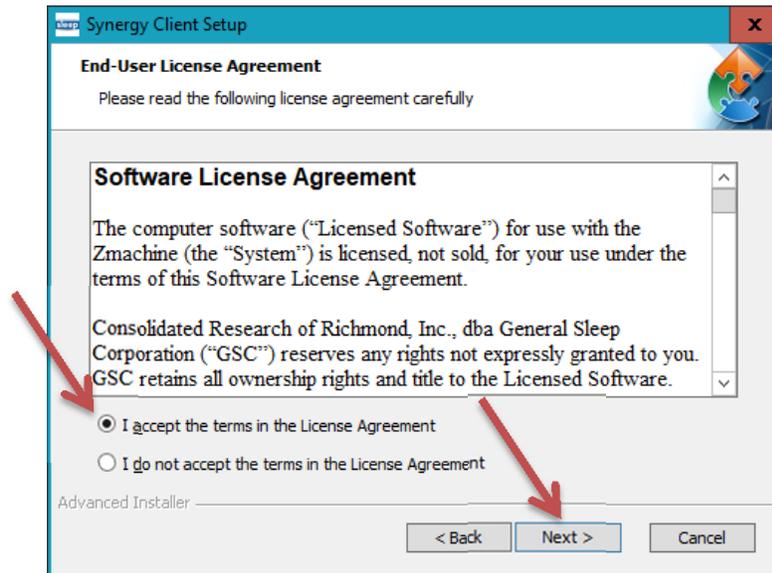


After you have verified the publisher listed is “Consolidated Research of Richmond, Inc.,” you should select “Run anyway” to install the software.

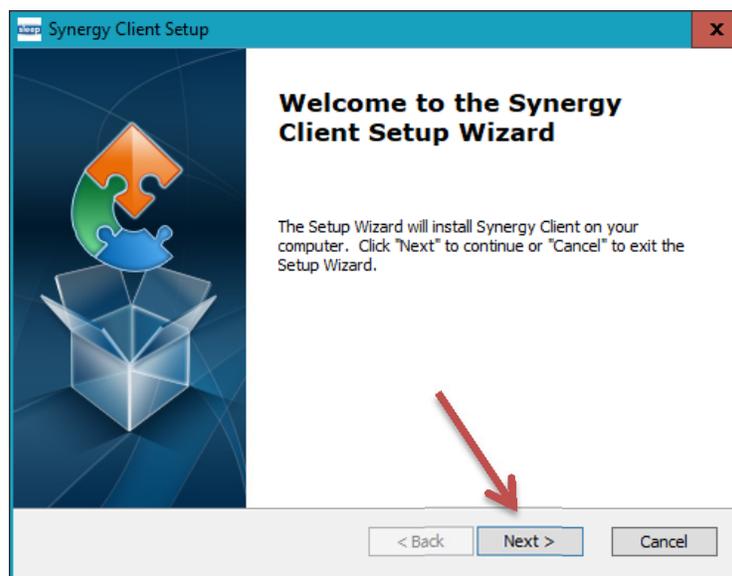


Installation

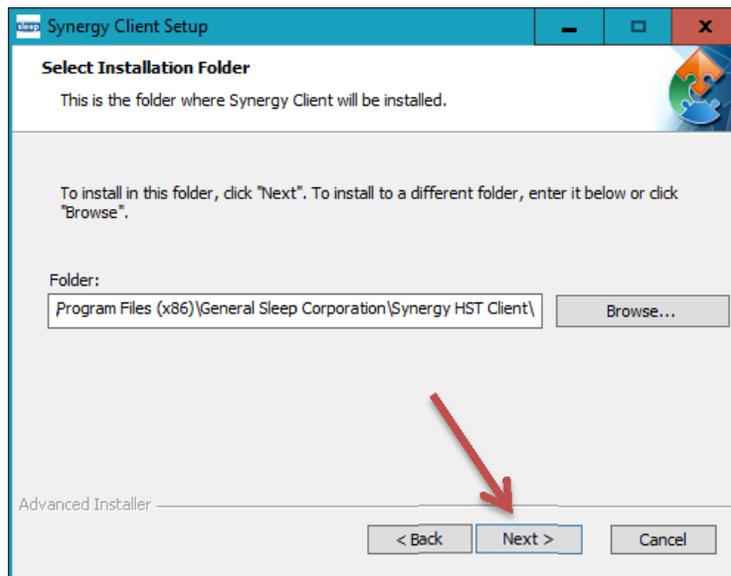
Once the installer is downloaded and running, you see a Synergy Client Setup window with an End-User License Agreement. Read the license agreement and click the “I accept the terms in the License Agreement” radio button if you wish to proceed with the installation process. Then click the “Next >” button.



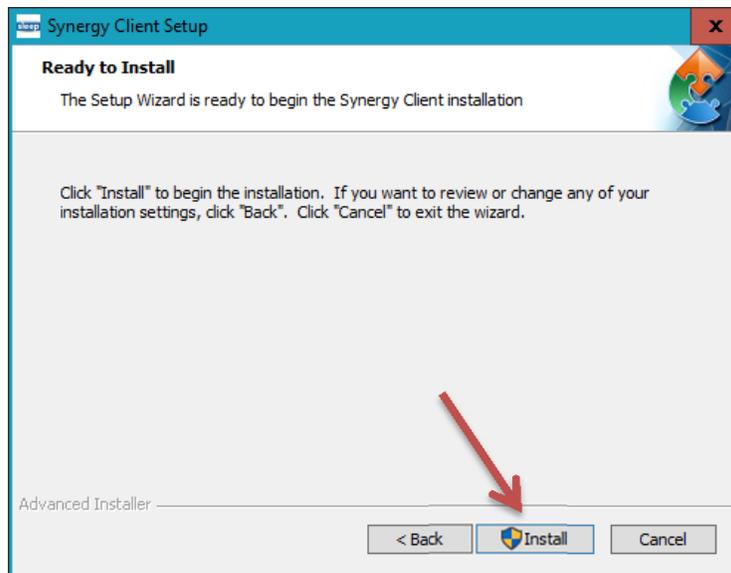
On the “Welcome to the Synergy Client Setup Wizard” click the “Next >” button.



The installer will then ask where the software should be installed. For most users the default directory shown should be correct, and you should press the “Next >” button without any changes.

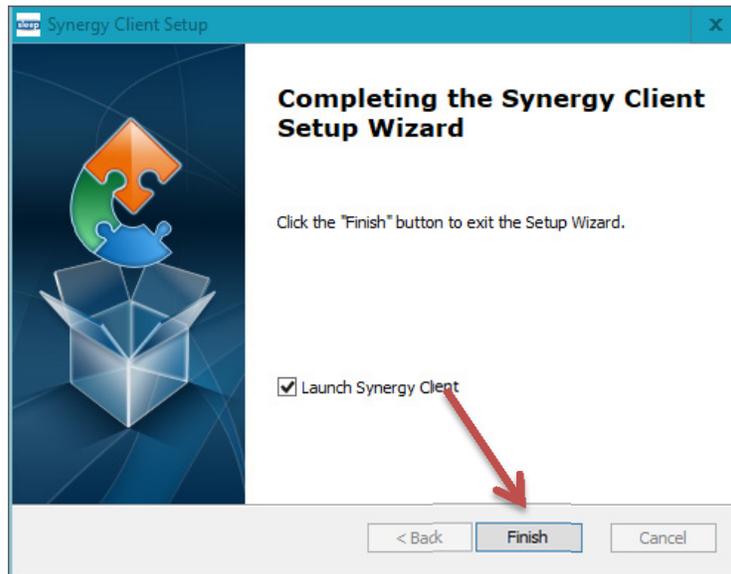


On the “Ready to Install” window, click the “Install” button to install the software.



You will then see a window asking if it is OK for the installer application to make changes to your computer. Select “Yes” to continue.

The installer will then copy the appropriate files to your computer. When it has finished, you will see the final installer window, where you can click the “Finish” button to launch the Synergy Client Software.



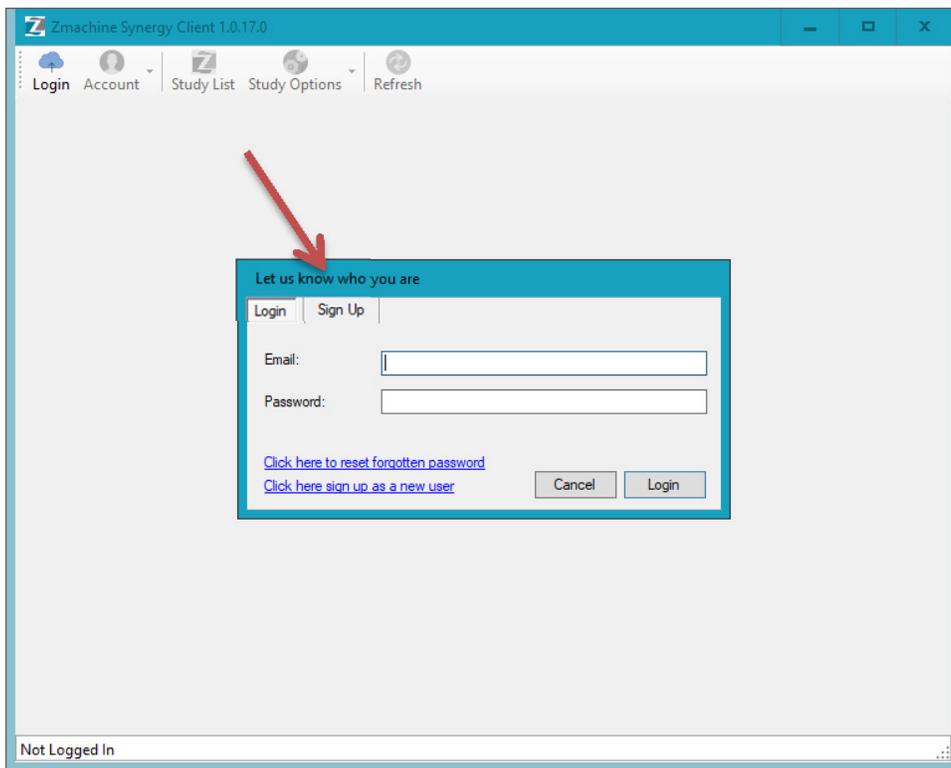
Account Creation

Using the Synergy Client Software requires you to register for an account, which is identified by your email address. This account is used to keep track of which users are part of the same organization for study data access and billing purposes.

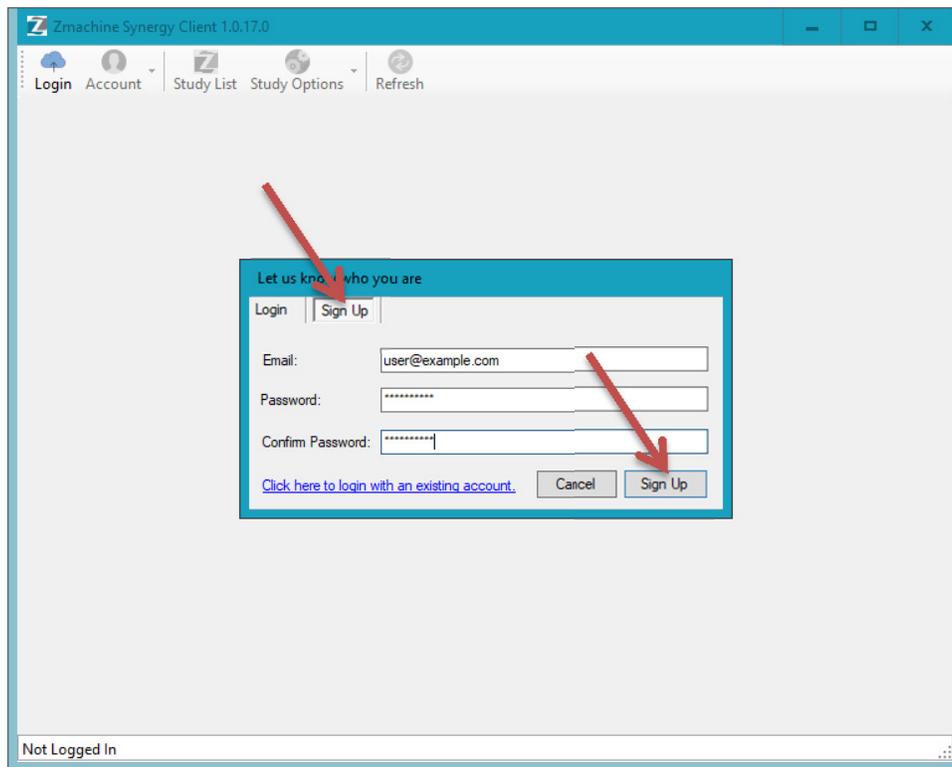
There is no charge to sign up for an account.

Create an Account

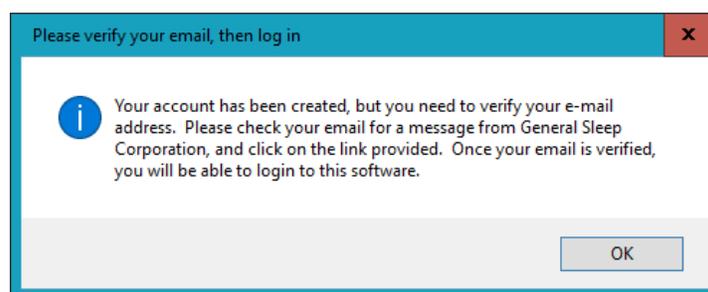
When you first start the Synergy Client you will be presented with a login window titled “Let us know who you are.”



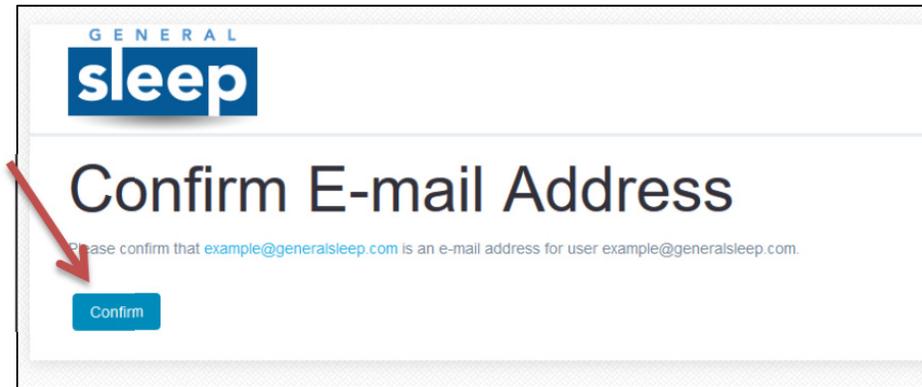
Since you do not have an account yet to log in, you should click the “Sign Up” tab at the top of the window and enter your email address and select a password to sign up for a new account. Press the “Sign Up” button when you are finished.



You should then see a message indicating that the account was created, but needs to be confirmed:

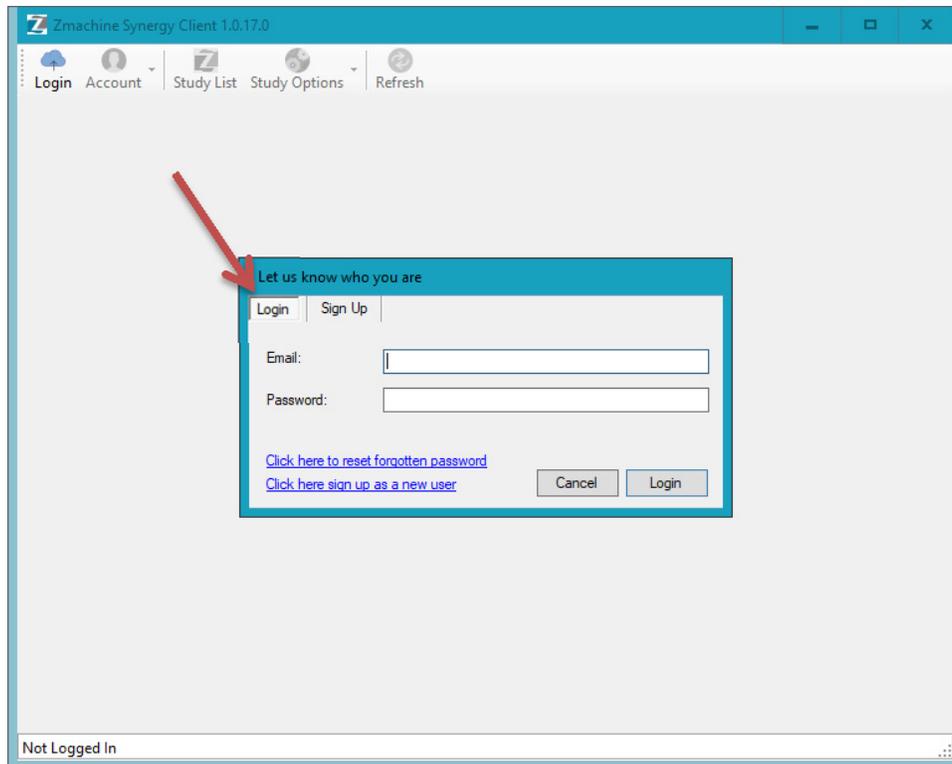


You should check your email after a few minutes (also check your email junk or spam folder) for a confirmation email from General Sleep Corporation. Click on the link in that email and it will open a browser window asking you to confirm your email address. Press the “Confirm” button and your account is ready to use.



Account Setup

Now that you have an account setup, you should be able to enter your email address and password on the login tab.



The first time you log in, you will see the account information screen, where you can enter your name and telephone number.

The screenshot shows a web application window titled "Zmachine Synergy Client 1.0.17.0". The navigation bar includes "Logout", "Account", "Study List", "Study Options", and "Refresh". The main heading is "Welcome John Doe" with a blue medical device icon to the right. A green message says "Please update your account information." Below this is a "My Information" form with fields for First Name (John), Last Name (Doe), Email (example@generalsleep.com), Telephone ((123) 456-7890 and 111), and Mobile ((123) 456-7890). A message box states: "This account is not yet linked to a billing account. Please link to a billing account by going to the Billing Information screen." A button labeled "Link Billing Information" is below the message. The footer shows the email address "example@generalsleep.com".

Zmachine Synergy Client 1.0.17.0

Logout Account Study List Study Options Refresh

Welcome John Doe

Please update your account information.

My Information

First Name:

Last Name:

Email:

Telephone:

Mobile:

This account is not yet linked to a billing account. Please link to a billing account by going to the Billing Information screen.

[Link Billing Information](#)

example@generalsleep.com

There are three ways to proceed at this point:

- 1) **You are establishing a new organizational billing account.** Follow the instructions below for setting up a new organization that will be purchasing Zmachine Synergy hardware kits, consumable kits, uploading new patient data, or sending study data out to be scored by General Sleep Corporation.

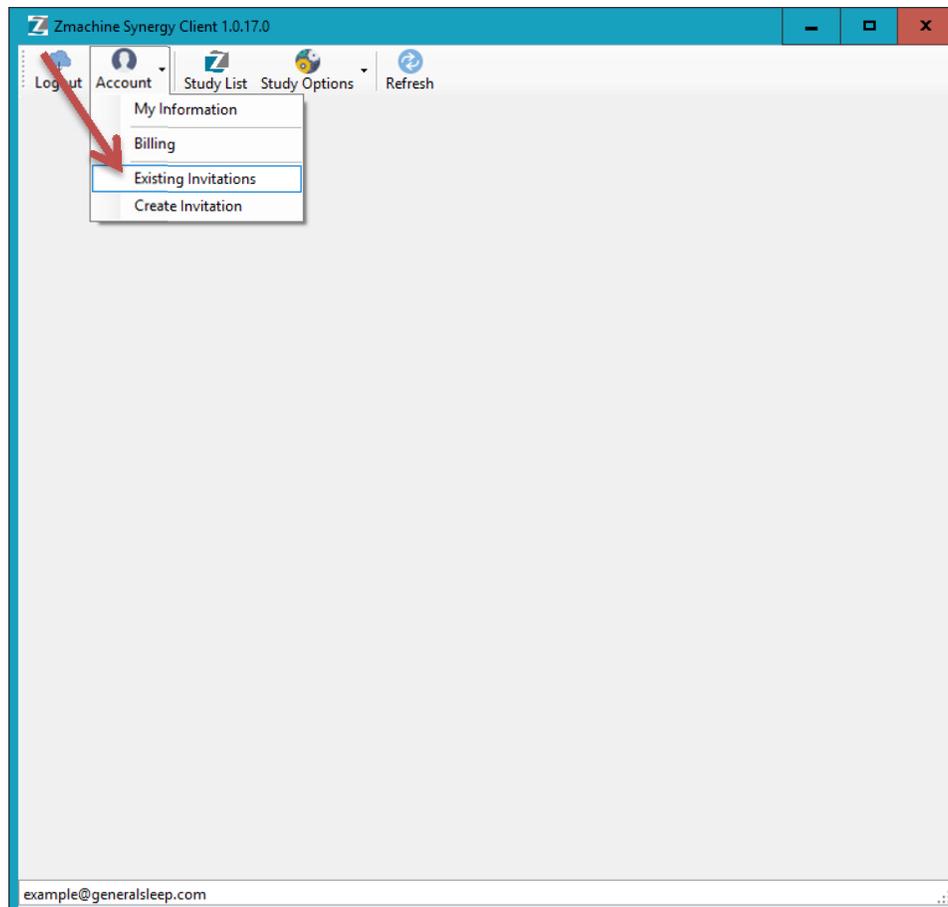
- 2) **You are joining an existing organization.** Follow the instructions below for joining an organization if you have been hired or invited to work with a company or organization which already has a General Sleep account. You should receive an email invitation informing you that you have been invited to join the organization

- 3) **You wish to use the Synergy Client Software without a billing account.** Choose this option if you are not part of a company that already has a billing account, and will not be creating or uploading studies of your own. You will still be able to receive study data from other organizations for scoring, interpretation or review. If this is the case for you, then the installation is complete and you can begin using the software. You may still wish to follow the instructions for creating a billing account if you want your organization name to appear in your interactions with other Synergy Client Software users.

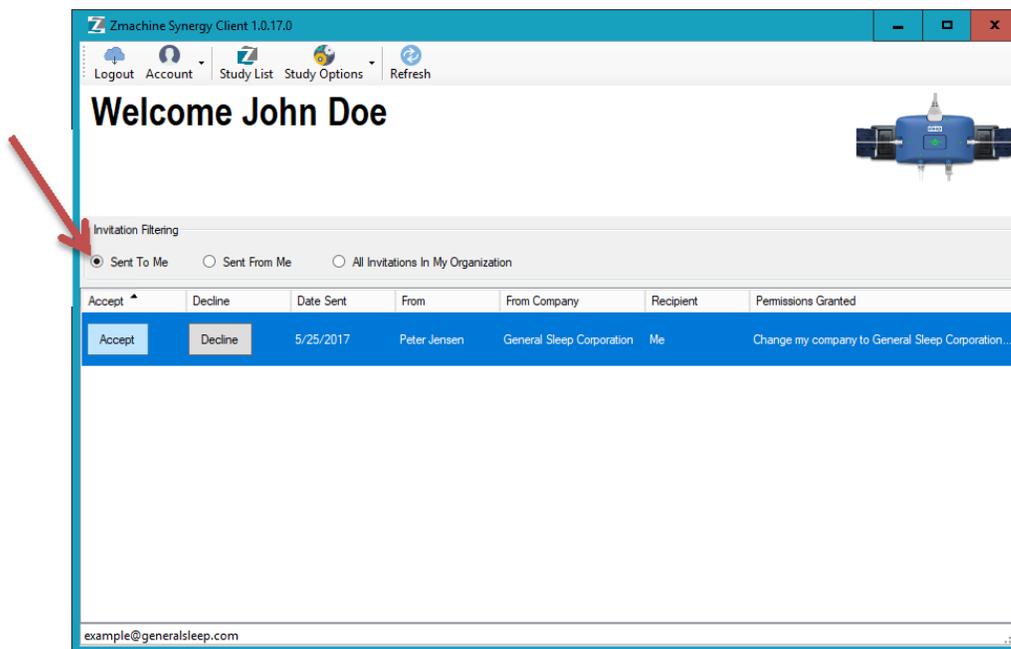
Joining an Existing Organization

If an existing organization would like you to have access to its study data, they should create an invitation in the Synergy Client Software with your email address. You will receive an email informing you that you have been invited to join the organization.

After you have received the invitation email, click the Account | Existing Invitations menu item.



In the invitations screen, select the “Sent To Me” radio button, and you should see the invitation to join the organization in your list of invitations. Click the “Accept” button, and your user account will now belong to the organization that invited you.

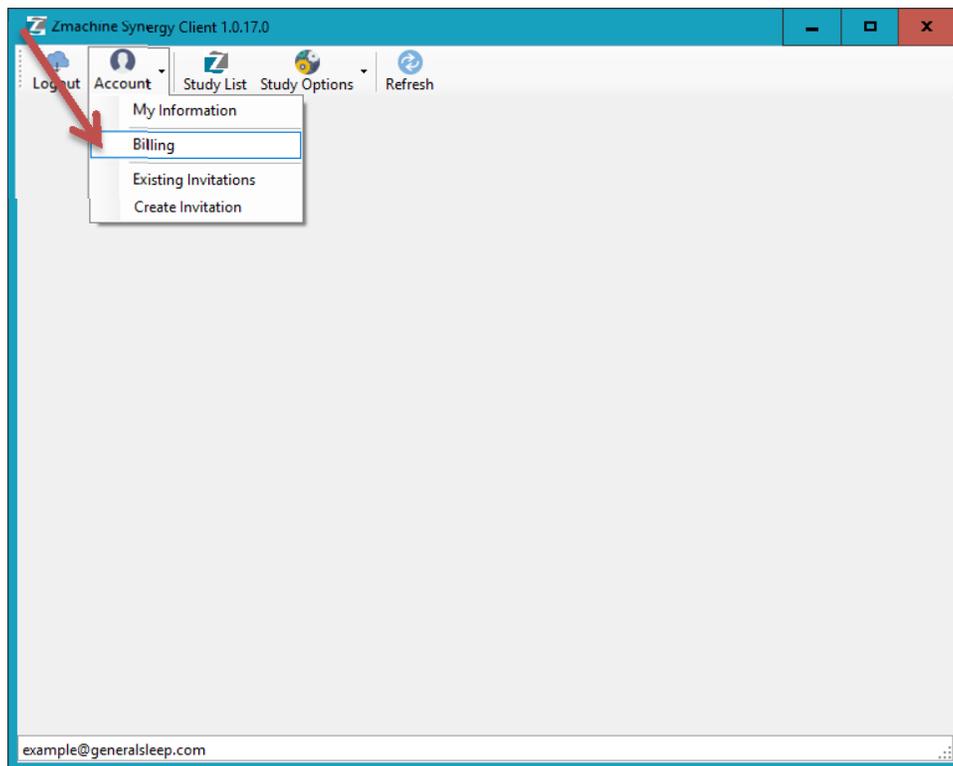


Establish a New Organization and Billing Account

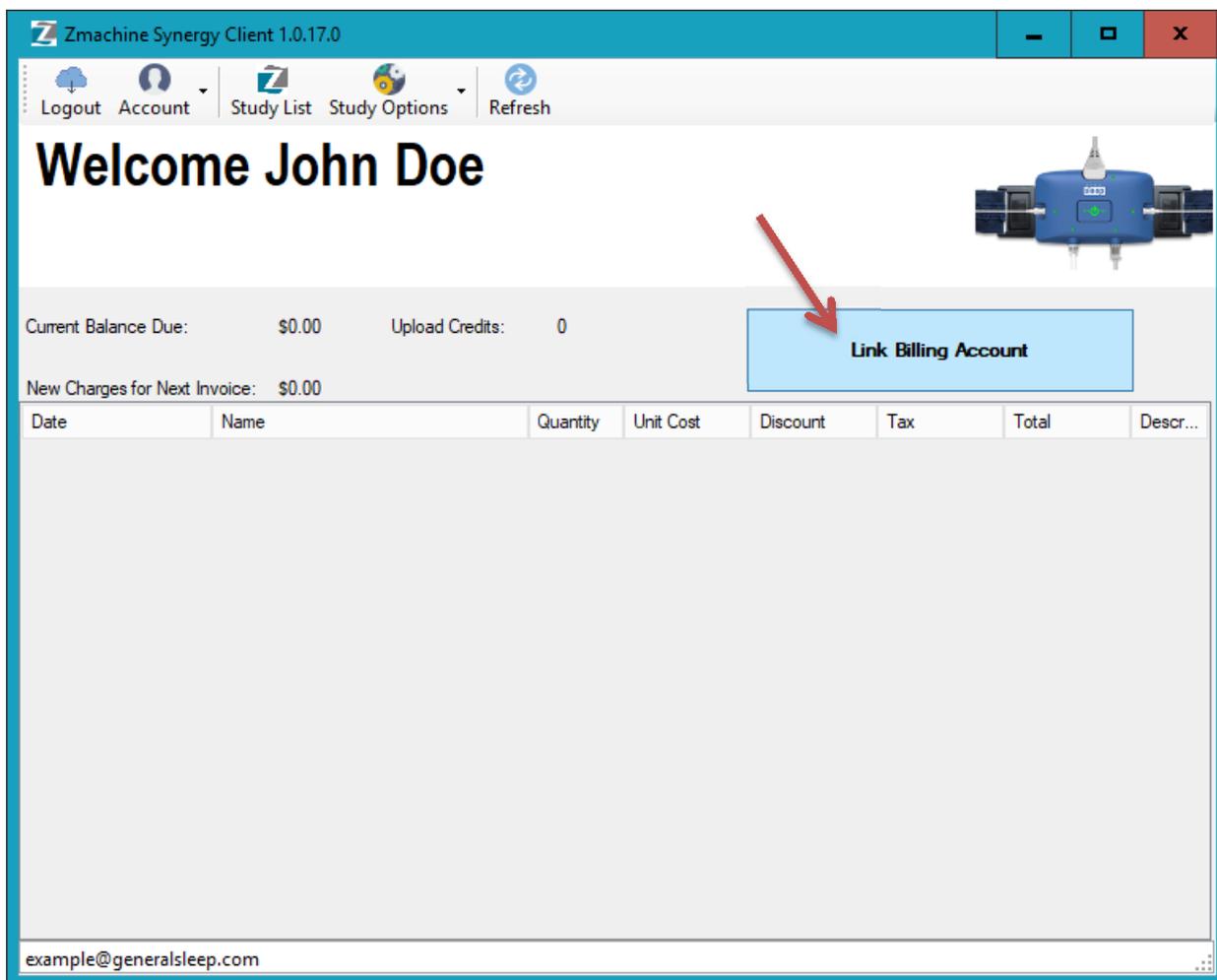
To establish a new billing account, or order Zmachine Synergy kits, please contact General Sleep Corporation at (888) 330-4424.

The representative at General Sleep Corporation will setup a new organization in the billing system, and give you your customer number.

Select the Account | Billing menu item:



Then select the “Link Billing Account” button.



In the “Link Billing Account” window, enter the billing account name provided to you by General Sleep Corporation, and select Link.

Link Billing Account

Account Name

Please enter the billing account name provided to you by General Sleep Corporation. If you do not have a billing account, please contact General Sleep at 888-330-4424.

Billing Account Name:

Cancel Link

Your organizational information will now be linked to the General Sleep Corporation billing system, and you will be able to upload data, and order Zmachine Synergy consumables kits from the Synergy Client Software

Managing Users in Your Organization

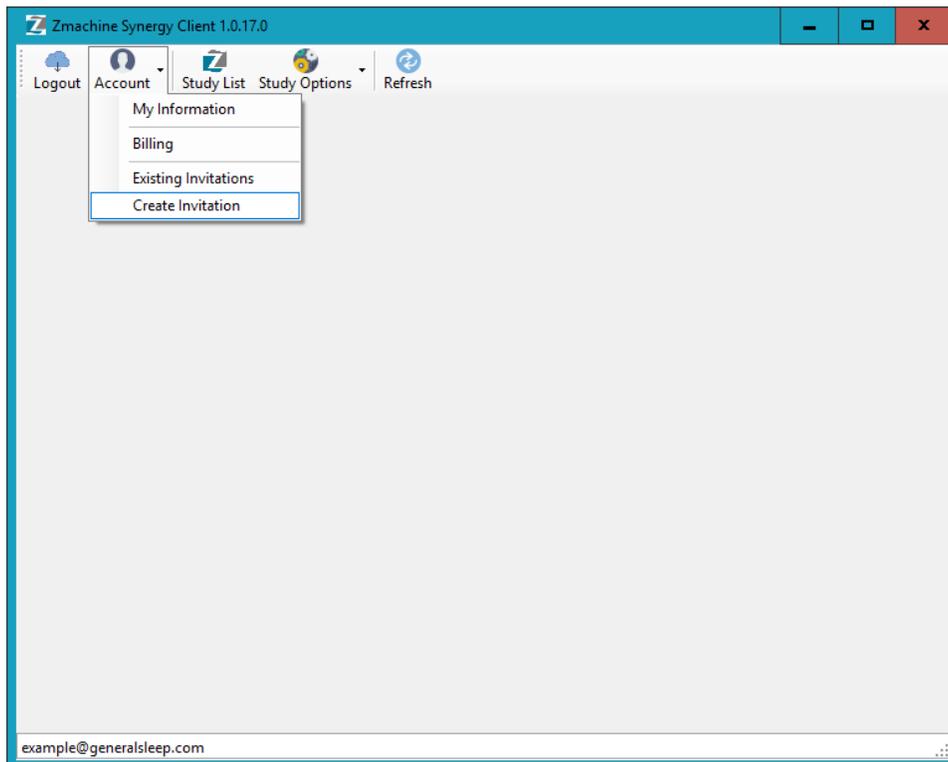
You can add other users to your organization, and set their permissions.

Inviting Someone to Join Your Organization

If you wish to have another user join your organization, you need to know their email address. The steps are:

- 1) You invite the user to join your organization using the Synergy Client Software and the new members email address
- 2) The new member of your organization will receive an email letting them know they have been invited to join your organization
- 3) The new member can download the Synergy Client Software, and setup a user account
- 4) Following the instructions in this document for setting up a new account, the new member of your organization can accept your invitation to join your organization

To send the invitation to the new user, select the Account | Create Invitation menu item:



You will then see the new invitation window. Make sure your window is sized large enough to see all the buttons, as shown in this picture:

Zmachine Synergy Client 1.0.17.0

Logout Account Study List Study Options Refresh

Welcome John Doe

Send a new Invitation

Send this invitation to (select from list, or type in an email):

The recipient is my coworker. They are an employee or member of my company, and I want all study data they upload to be owned by my organization.

Invite recipient to be a member of your organization

The recipient is already a member of my organization, or the checkbox above to invite them to join my organization is checked. I would like to give the recipient the following additional permissions.

Authorize this coworker to share studies with coworkers and partners

Authorize recipient to be an administrator for your organization

Authorize this coworker to interpret studies

Authorize this coworker to score studies

The recipient is from another company or organization. I would like to add the recipient to the list of approved partners. Then, my coworkers will be allowed to share study data to the recipient for scoring, interpretation, or viewing.

Authorize recipient to receive study data from your organization

Revoke Permissions

example@generalsleep.com

In the list “Send this invitation to (select from list, or type in an email):” type in the email address of the user you want to invite to your organization.

Select the “Invite recipient to be a member of your organization” check box. Also select the checkboxes in the next group that grant permissions to this new user, as desired.

Zmachine Synergy Client 1.0.17.0

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Invite recipient to be a member of your organization

The recipient is already a member of my organization, or the checkbox above to invite them to join my organization is checked. I would like to give the recipient the following additional permissions.

- Authorize this coworker to share studies with coworkers and partners
- Authorize recipient to be an administrator for your organization
- Authorize this coworker to interpret studies
- Authorize this coworker to score studies

The recipient is from another company or organization. I would like to add the recipient to the list of approved partners. Then, my coworkers will be allowed to share study data to the recipient for scoring, interpretation, or viewing.

Authorize recipient to receive study data from your organization

Revoke Permissions

example@generalsleep.com

Permissions available are:

- **Authorize this coworker to share studies with coworkers and partners:** This permission allows the user to send study data for scoring and/or interpretation to other members of your organization, or to partners you have authorized to receive data from your organization.
- **Authorize recipient to be an administrator for your organization:** This permission allows the user to change permissions of users within your organization, and order supplies for your organization.
- **Authorize this coworker to interpret studies:** This permission allows the user to interpret studies that they have access to. This user should be qualified to interpret data.
- **Authorize this coworker to score studies:** This permission give the user access to the scoring screens so they can annotate and score study data. This user should be a qualified to score study data.

After you have selected the permissions and entered the new members email address, make sure the “Revoke Permissions” checkbox is NOT checked, and click the “Send Invitation” button.

The email address you entered will be sent an email informing the person that they have been invited to join your organization. If the user does not have an account, they can create one. If they already have an account, they can log in to the Synergy Client Software right away. Then, the new member selects Account | Existing Invitations and can Accept your invitation to join your organization.

Removing Someone from Your Organization

To remove a user from your organization, follow the steps for Inviting Someone to Join Your Organization above, except check the “Revoke Permissions” checkbox. When the “Revoke Permissions” checkbox is checked, the descriptions of the permissions for the invitation change.

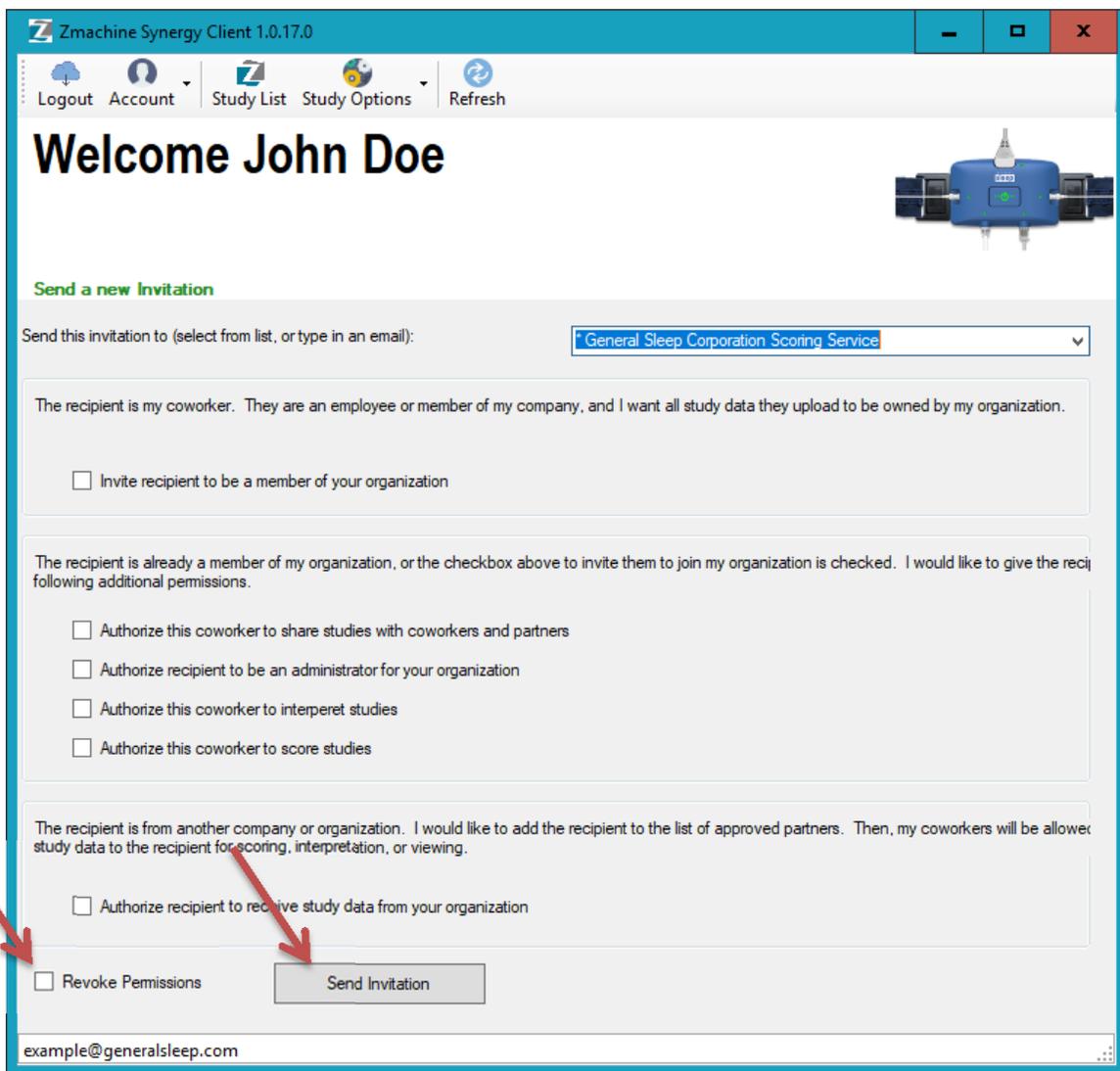
If the “Remove recipient from your organization and revoke all permissions” checkbox is checked, then the four permissions in the next group do not matter, as all permissions to your organization will be revoked.

Click the “Send Invitation” button to remove the recipient from your organization. You must have administrator permissions for this to work.

Changing Permissions for Members of Your Organization

Adding and removing permissions for members of your organization can be done from the Account | Create Invitation screen.

To remove permissions, select “Revoke Permissions” check box at the bottom of the screen. To grant permissions, uncheck the “Revoke Permissions” checkbox. You can only grant permissions, or revoke permissions with a single invitation, not both at the same time. If you want to grant some permissions and revoke others, then send two invitations (once with the “Revoke Permissions” check box checked, and once with it unchecked).



Zmachine Synergy Client 1.0.17.0

Logout Account Study List Study Options Refresh

Welcome John Doe

Send a new Invitation

Send this invitation to (select from list, or type in an email):

The recipient is my coworker. They are an employee or member of my company, and I want all study data they upload to be owned by my organization.

Invite recipient to be a member of your organization

The recipient is already a member of my organization, or the checkbox above to invite them to join my organization is checked. I would like to give the recipient the following additional permissions.

Authorize this coworker to share studies with coworkers and partners

Authorize recipient to be an administrator for your organization

Authorize this coworker to interpret studies

Authorize this coworker to score studies

The recipient is from another company or organization. I would like to add the recipient to the list of approved partners. Then, my coworkers will be allowed to share study data to the recipient for scoring, interpretation, or viewing.

Authorize recipient to receive study data from your organization

Revoke Permissions

example@generalsleep.com

The meanings of the different permissions are described in the “Inviting Someone to Join Your Organization” section of this document.

Authorizing a User From Outside Your Organization to Receive Study Data

If you wish to send study data to users outside of your organization, you need to authorize them to do so. You use the Account | Create Invitation screen to accomplish this.

Zmachine Synergy Client 1.0.17.0

Logout Account Study List Study Options Refresh

Welcome John Doe

Send a new Invitation

Send this invitation to (select from list, or type in an email):

The recipient is my coworker. They are an employee or member of my company, and I want all study data they upload to be owned by my organization.

Invite recipient to be a member of your organization

The recipient is already a member of my organization, or the checkbox above to invite them to join my organization is checked. I would like to give the recipient the following additional permissions.

Authorize this coworker to share studies with coworkers and partners

Authorize recipient to be an administrator for your organization

Authorize this coworker to interpret studies

Authorize this coworker to score studies

The recipient is from another company or organization. I would like to add the recipient to the list of approved partners. Then, my coworkers will be allowed to share study data to the recipient for scoring, interpretation, or viewing.

Authorize recipient to receive study data from your organization

Revoke Permissions

example@generalsleep.com

Make sure the “Revoke Permissions” checkbox is NOT checked. Leave all the checkboxes in the first two groups unchecked. Check the “Authorize recipient to receive study data from your organization” checkbox. Enter the email address of the user into the drop down list at the top of the page, and then press the “Send Invitation” button.

An email will be sent to the email address you entered, informing the recipient that they have been invited to be a partner with your organization for receiving study data. They can accept this invitation in the Account | Existing Invitations screen, and they will then be shown on the list of users to whom study data can be sent on the Study List page.