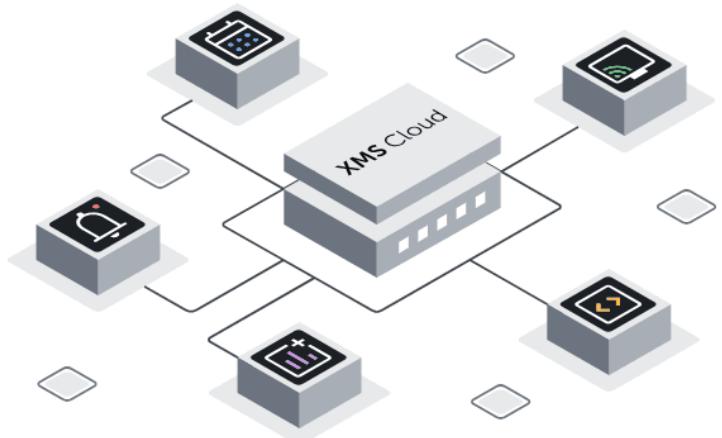


# XMS Cloud

ClickShare



User guide

## **Product revision**

Firmware: 02.23.00

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# 1

## About XMS Cloud

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## 1.1 Introduction to XMS Cloud

### About

The XMS Cloud Management Platform offers the ultimate solution for IT managers deploying or owning a large install base of ClickShare and/or wePresent wireless collaboration devices. It provides an easy to use interface for remote and reliable device management to guarantee the user experience and brings useful analytical data to drive the Digital Workplace.

The XMS Cloud Management Platform allows to monitor and manage the latest ClickShare devices within your environment. It is your companion to get worldwide access to your install base.

With XMS Cloud, IT managers are always in full control of all ClickShare Base Units within the network. They can securely access and configure units, monitor their health status and update them to the most recent firmware with just a few clicks to benefit from the latest functionality & features.

### XMS Cloud Versus XMS Edge

The following table provides a side-by-side comparison between XMS Cloud and XMS Edge:

Functionality	XMS Cloud	XMS Edge
Smooth Integration of ClickShare and wePresent units into the company network.	✓	✓
Health and status monitoring	✓	✓
Scheduling of software updates	✓	✓
User management	✓	✓
Clone configuration	✓	✓
Remote wallpaper installation	✓	✓
Support for the latest models	✓	✓
Enhanced security with support for device certificates	✓	✓
Secured Cloud access from anywhere	✓	
Dashboard and notifications	✓	
Multi-site overview with location tree	✓	
Device templates	✓	
Insight and reporting	✓	
User role management	✓	

## 1.2 Network deployment requirements

### About requirements

Below listed domains must be allowed to communicate across the given port. These connections are required for XMS Cloud to function optimally.

### Required ports

Domain	Port
xms.cloud.barco.com	443
barcoprdwebsites.azureedge.net	443

Domain	Port
sil-xms-prd01-iothub.azure-devices.net	443
silxmsprd01sa.blob.core.windows.net	443
azure.microsoft.com	443
*.cloudapp.azure.com	443
*.azure-devices.net	443
*.core.windows.net	443
*barco.com	80

## 1.3 XMS Cloud Startup

### Preferred browser

XMS Cloud is a web-based application that works with any and all web browsers. However, for the best user experience, Barco recommends using Google Chrome.

### How to startup

1. Open a browser window and type <https://xms.cloud.barco.com> in the address bar.

The login page opens.

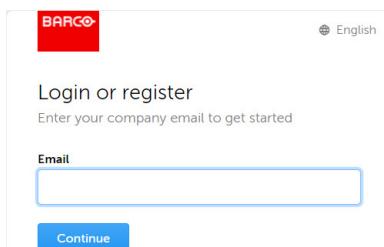


Image 1-1

2. Enter your E-mail address and click **Continue**.

The system checks if you are registered.

If you are already registered, you will be logged on and XMS Cloud opens.

If you are not yet registered, the registration procedure will start. Follow the instructions on the screen.

## 1.4 XMS Cloud UI (User Interface)

### Overview

The XMS Cloud User Interface (UI) is divided in 4 major sections.

## About XMS Cloud

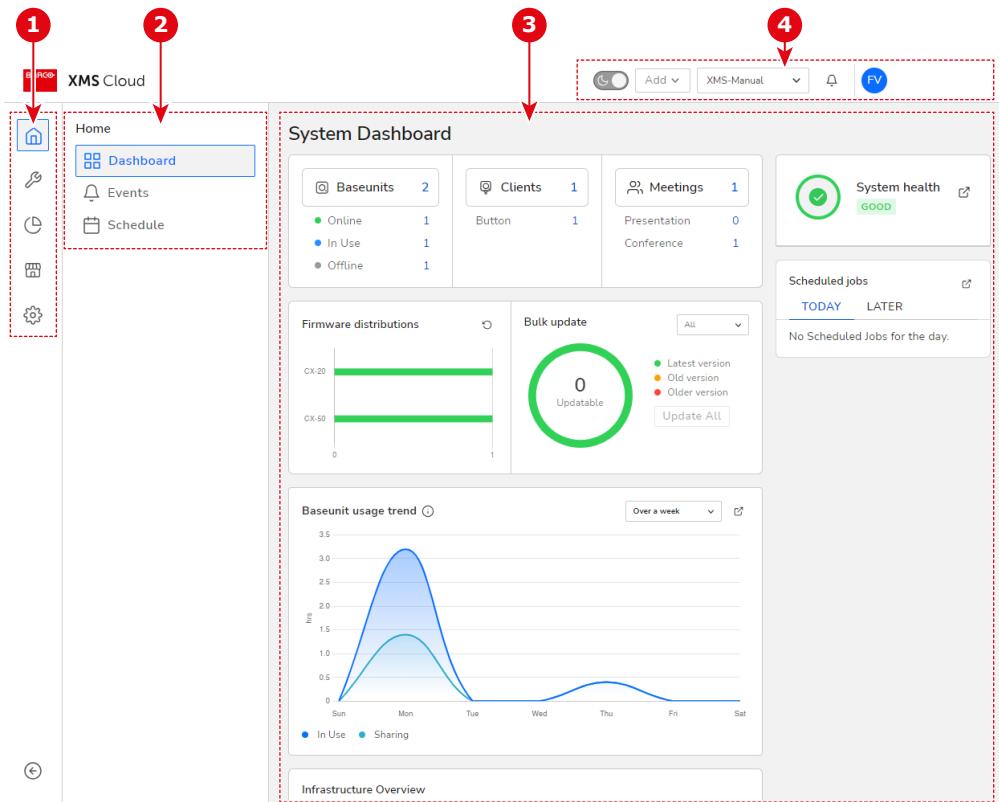


Image 1-2 XMS Cloud UI (User Interface) landing page

- 1 Menu bar
- 2 Submenu bar
- 3 Viewport
- 4 Header

# 2

## Header

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## 2.1 About header

### Overview

The header contains options and information that affect the entire XMS Cloud.



Image 2-1 Header section of the UI (User Interface)

<b>1</b> Theme slider <b>2</b> Add menu <b>3</b> Organisation menu	<b>4</b> Notification hub <b>5</b> User menu
--	---

## 2.2 Theme slider

### About the theme slider

The theme slider toggles the look of the entire UI (User Interface) to either have a white background with black text (day / light mode) or a black background with grey text (dark / night mode).

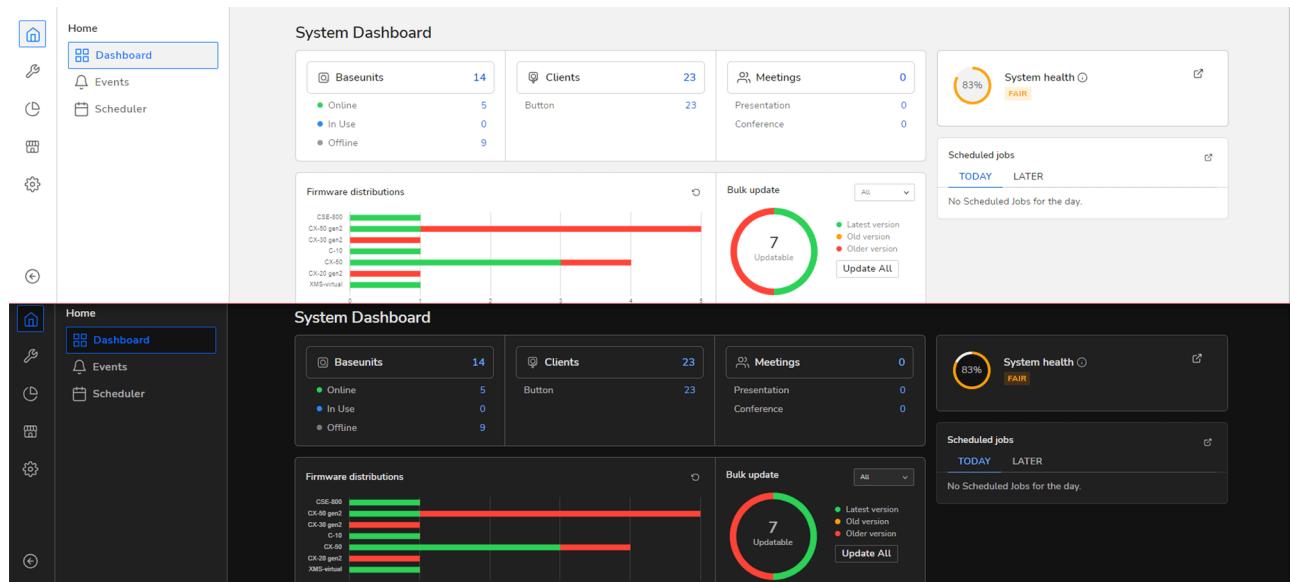


Image 2-2 Example between light and dark mode

## 2.3 Add menu

### About Add menu

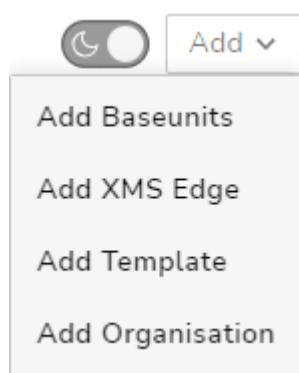


Image 2-3

The Add menu allows for:

- Adding or creating Base Units
- XMS Edge settings migration
- Adding or creating Templates
- Adding or creating Organisations

### 2.3.1 Add Base Units

#### About adding Base Units

Adding Base Units to XMS Cloud can be done using one of three methods:

1. Using the device token. This is the method for C and CX series Base Unit devices.
2. Using XMS Edge. This is the method for CSE series Base Unit devices..
3. Migration from XMS Edge: This restores the database from a previously running XMS Edge.

#### How to add C or CX series Base Units using device token

1. Click on the **add** drop-down list and select *add Base Units*.

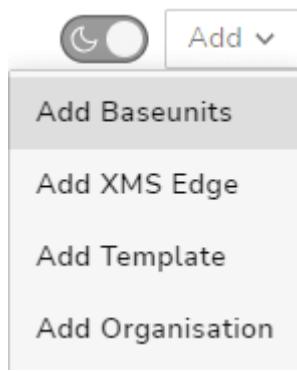


Image 2-4

The *add Base Unit* window is displayed.

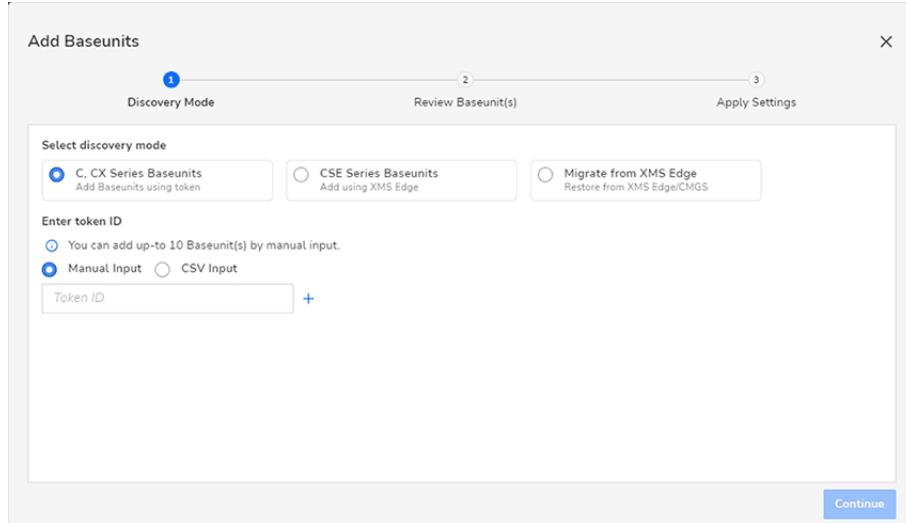


Image 2-5

2. If not already selected, under *Select discovery mode* select the first option: *Add Base Unit using token*.
3. Select the radio button of the desired input method:
  - *Manual Input*: Fill in each Token ID manually, one at a time. This is the preferred method if the amount of devices to add is minimal (up to 10).
  - *CSV Input*: Upload a .csv file (comma separated file) with the list of tokens of all devices you want to add. This is the preferred method if you have many units (>10) to add at the same time.

If you are using CSV Input, use the Upload file field to navigate to and select the desired CSV file on your computer.

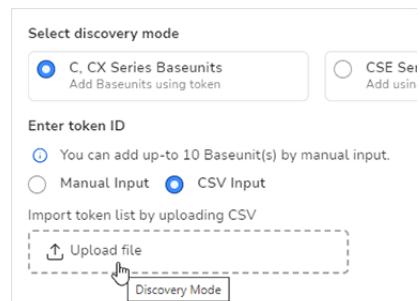


Image 2-6 Upload location for .csv files

4. If you are using *Manual Input*, fill out the *Token ID* field with the XMS Token ID from your Base Unit device.

 *Tip:* To obtain the Token ID, log into the Configurator of your Base Unit device. Browse to *System >> XMS*. You will find the token in the *XMS Cloud* pane.  
For more info on how to access the Configurator of your device, please refer the installation manual of your device.

5. To add an extra device, click on the “+” button and repeat the previous step.

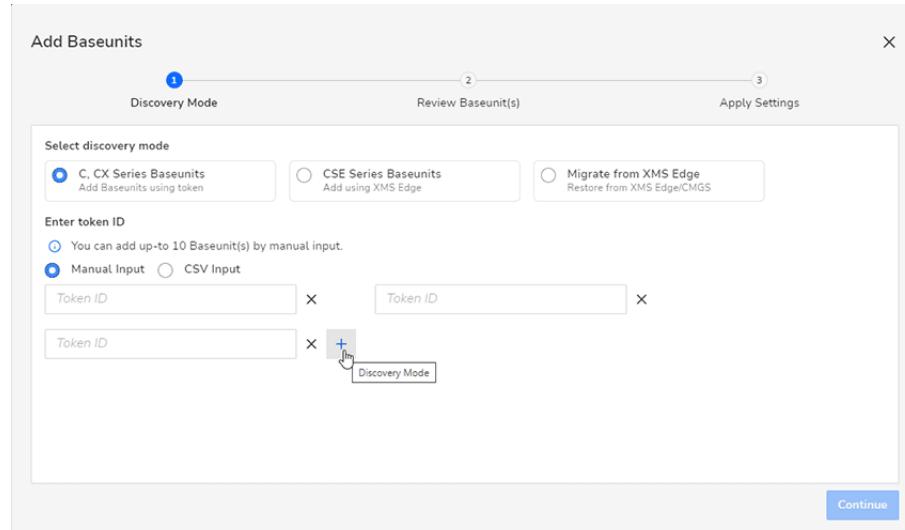


Image 2-7 Example adding Base Units

 *Tip:* To delete a Token ID field, click on the “X” button, next to the input field.

6. Once all desired devices are filled in, click **Continue**.

The Review Base Unit(s) page is displayed.

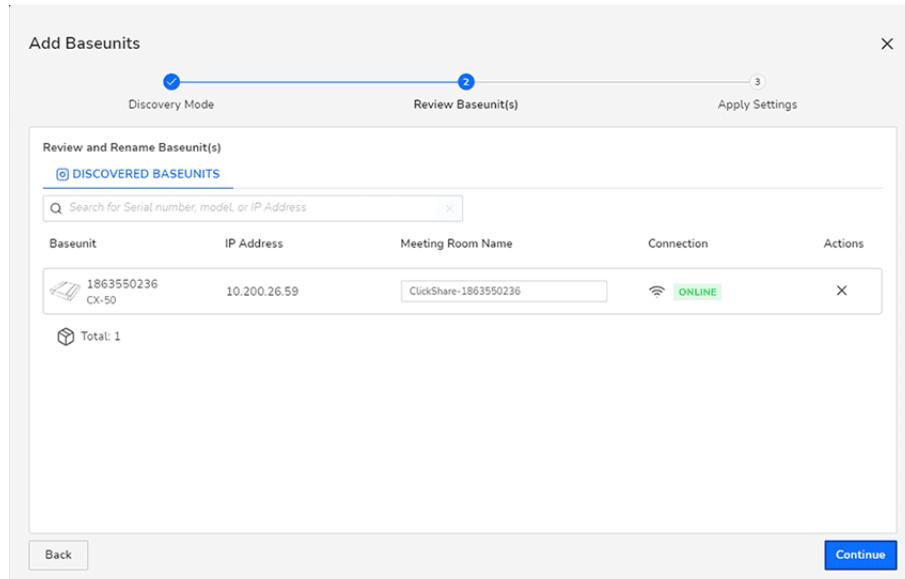


Image 2-8 Example of the Review Base Unit(s) page

7. If desired, you can change the *Meeting Room Name* field (optional).

 **Note:** You can also skip this step and change the name afterwards.

8. Click Continue.

The Apply Settings page is displayed.

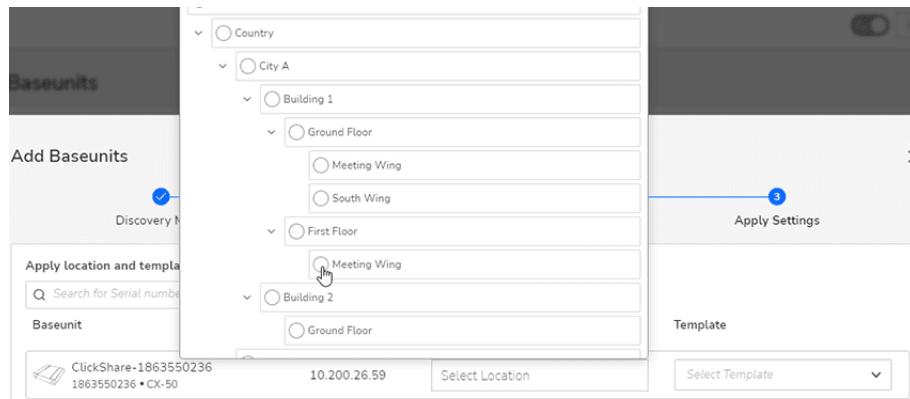


Image 2-9 Example meeting room location

9. On the Apply Settings page, you can select the location where the Base Unit device is located. Clicking on *Select Location* will open a location selector, using the locations of the current organisation.

10. Click **Register**.

All listed devices are registered in the system and added to the list of Base Unit devices.

## How to add CSE series Base Units using XMS Edge

1. Click on the **add** drop-down list and select *add Base Units*.

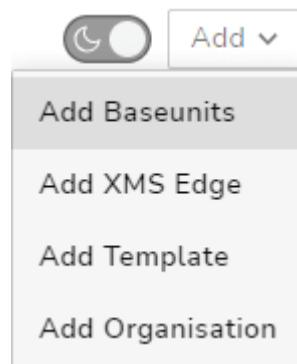


Image 2-10

The *add Base Units* window is displayed.

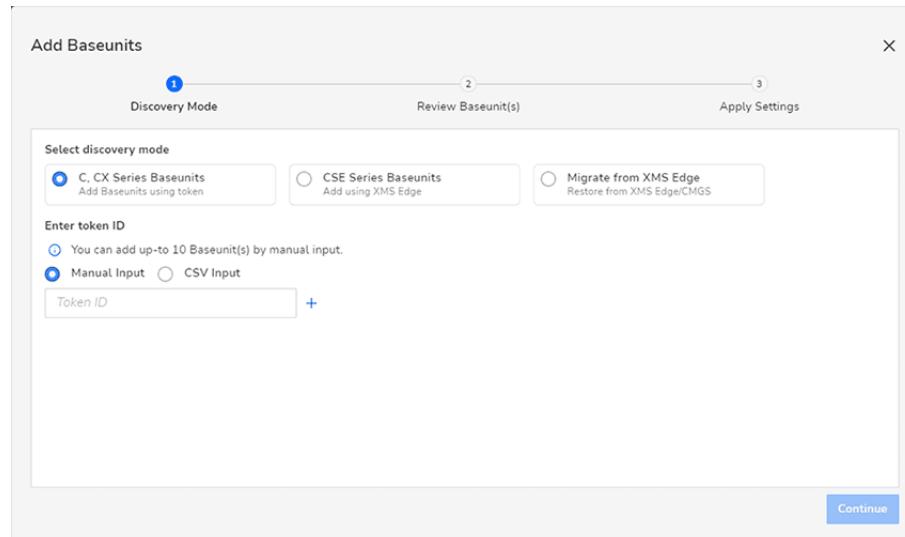


Image 2-11

**2.** Select the radio button in front of *CSE Series Base Unit devices*.

The window will change its options to XMS Edge related options.

**3.** Use the drop-down list to select the desired XMS Edge to search for Base Unit devices.

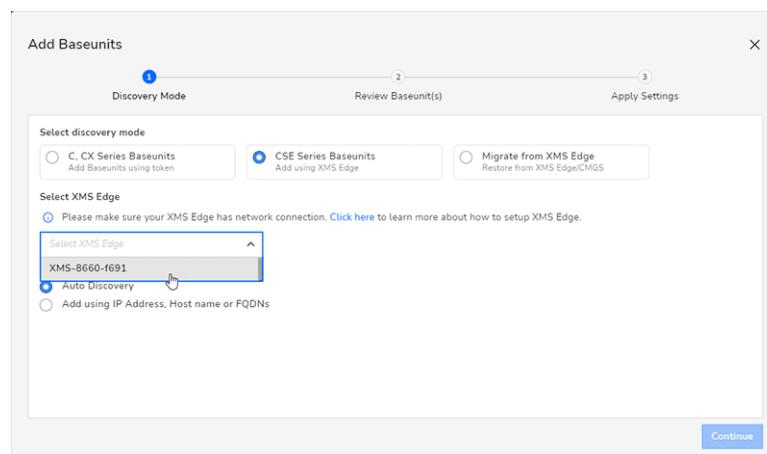


Image 2-12 Selection of XMS Edge

**4.** Select how to discover the Base Units.

The following selections are possible:

- *Auto Discovery*: Edge will auto discover Base Units.

- **Add using IP address:** Manually enter use the IP addresses, hostname or FQDN of Base Unit devices in the same subnet.

 **Note:** Use commas to separate the IP addresses, hostnames or the FQDN's of the Base Units in the input field.

## 5. Click **Continue**.

The Base Units discovery and registration process start automatically. Please wait until the process is completed.

Once completed, the discovered units will be listed in two ways:

- A list of Base Unit devices with “errors/warnings”. These are devices that cannot be added to XMS Cloud or cannot be reached.
- A list of “*Discovered Base Unit devices*” that will be added to XMS Cloud once completed.

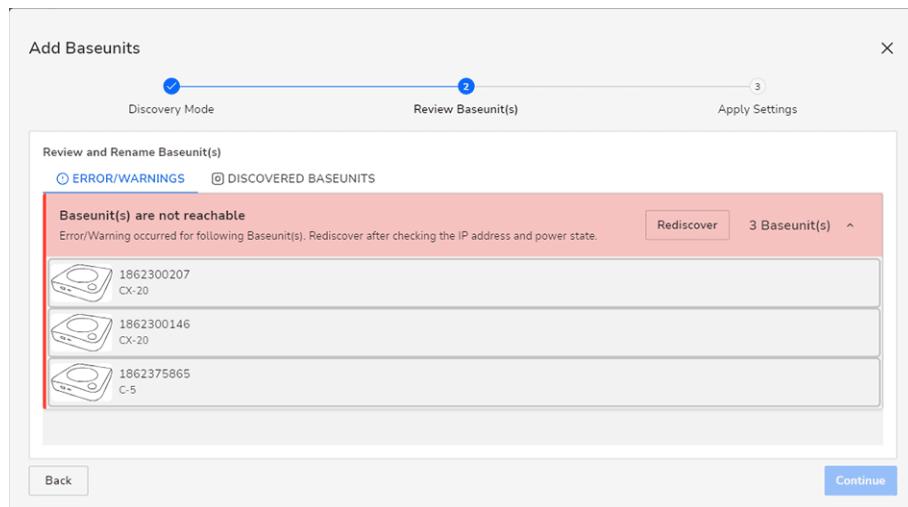


Image 2–13 Example of Base Unit devices that cannot be reached.

## 6. In case of Base Unit devices that cannot be reached, resolve the connectivity issues (power, network or other issues) and click **Rediscover** to add them to the list of discovered devices.

## 7. Click **Continue**.

The Apply Settings window is displayed.

## 8. On the Apply Settings page, you can select the location where the Base Unit devices will be located. Clicking on *Select Location* will open a location selector, using the locations of the current organisation.

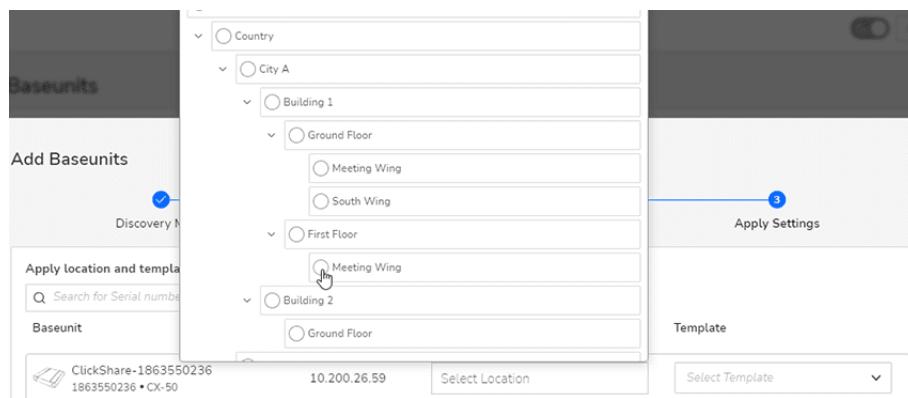


Image 2–14

## 9. Click **Register**.

All listed devices are registered in the system and added to the list of Base Unit devices.

## How to migrate Base Units from XMS Edge

CX- and C- series based devices stored in XMS Edge can be migrated to XMS Cloud. This process is done in 2 sub-processes:

1. Preparing XMS Edge for devices migration.
2. Configuring migrated devices into XMS Cloud.

### Preparing XMS Edge for Base Units migration.

1. Within XMS Edge, click the *Device Manager application* on the bottom left.

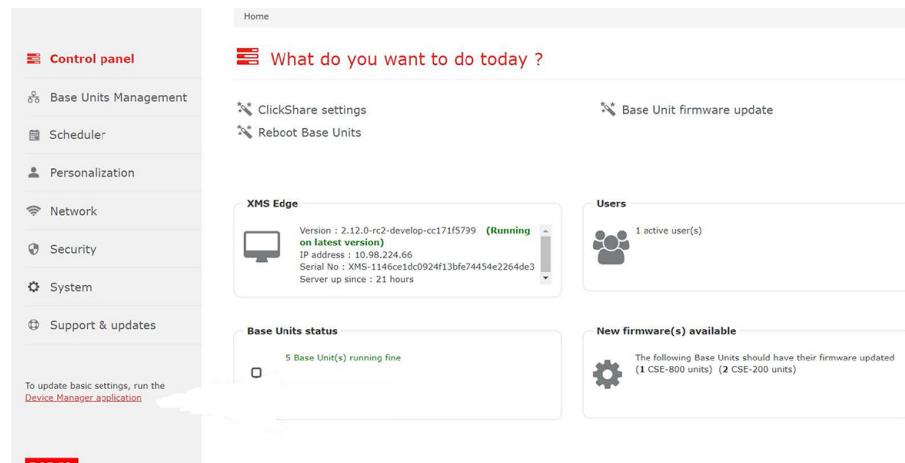


Image 2-15

2. Click System >>XMS Mode.

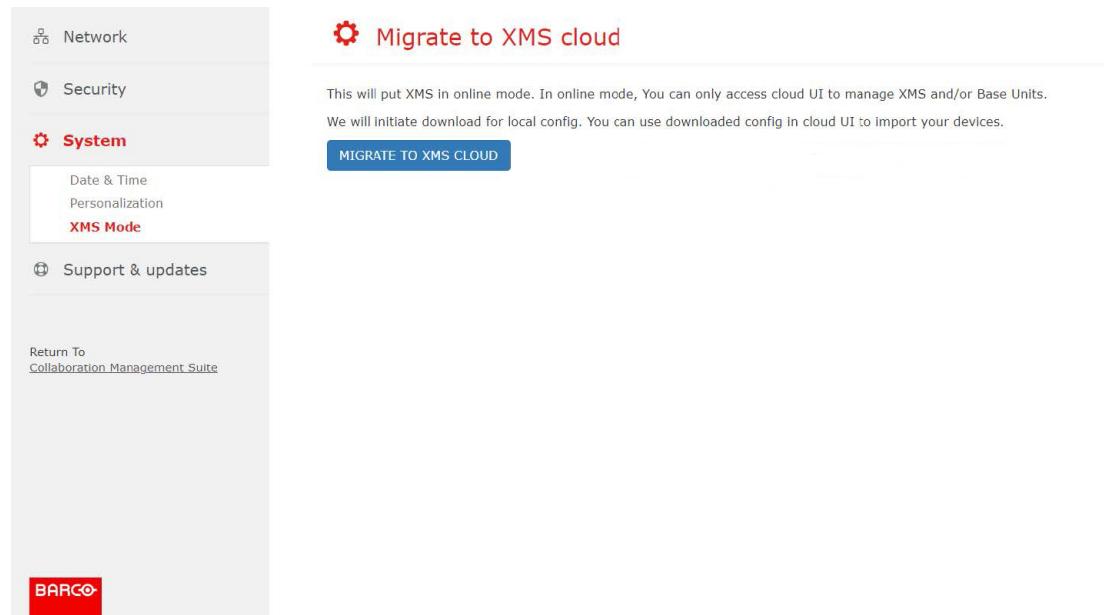


Image 2-16

3. Click **MIGRATE TO XMS Cloud**.
4. Choose your connection configuration in the wizard and click **Next**.

Scenarios	Description	Recommended configuration
XMS Edge and Base Units on a non-DMZ network	XMS Edge and Base Units on the network with internet connectivity.	Select <b>Direct Connection</b> Deselect <b>Enable proxy for C/CX</b>
XMS Edge on a non-DMZ network and Base Units on a DMZ network	XMS Edge on the network with internet connectivity. Base Units on the network with no internet connectivity.	Select <b>Direct Connection</b> Select <b>Enable proxy for C/CX</b>
XMS Edge on a DMZ network and Base Units on a non-DMZ network	XMS Edge on the network with no internet connectivity. Base Units on the network with internet connectivity.	Select <b>Connection via Proxy</b> Deselect <b>Enable proxy for C/CX</b>
XMS Edge and Base Units on a DMZ network	XMS Edge and Base Units on the network with no internet connectivity.	Select <b>Connection via Proxy</b> Deselect <b>Enable proxy for C/CX</b>

**5.** Choose your connection configuration in the wizard and click **Next**.

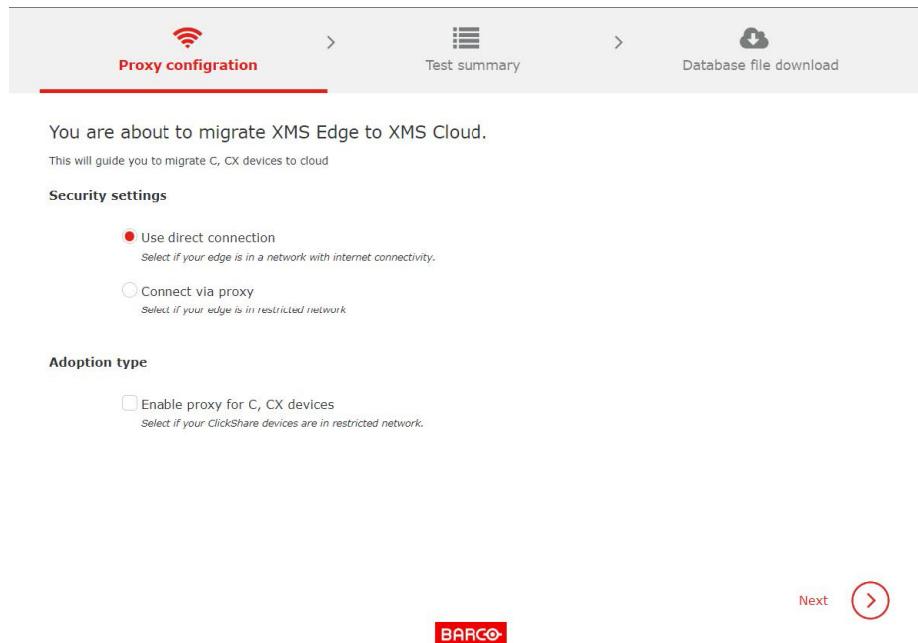


Image 2–17 Direct connection for XMS Edge and ClickShare Base Unit devices.

## Header

You are about to migrate XMS Edge to XMS Cloud.

This will guide you to migrate C, CX devices to cloud

### Security settings

Use direct connection  
Select if your edge is in a network with internet connectivity.

Connect via proxy  
Select if your edge is in restricted network

Proxy server URL	<input type="text" value="http://10.98.224.55"/>
Proxy server port (Optional)	<input type="text" value="3128"/>
Username (Optional)	<input type="text" value="admin"/>
Password (Optional)	<input type="text" value="*****"/>

### Adoption type

Enable proxy for C, CX devices  
Select if your ClickShare devices are in restricted network.

Next 

Image 2-18 Proxy connection for XMS Edge and direct connection for ClickShare Base Unit devices.

- Proxy connection for XMS Edge and direct connection for ClickShare Base Units.
- Proxy connection for XMS Edge and ClickShare Base Unit devices.

This will guide you to migrate C, CX devices to cloud

### Security settings

Use direct connection  
Select if your edge is in a network with internet connectivity.

Connect via proxy  
Select if your edge is in restricted network

Proxy server URL	<input type="text" value="http://10.98.224.55"/>
Proxy server port (Optional)	<input type="text" value="3128"/>
Username (Optional)	<input type="text" value="admin"/>
Password (Optional)	<input type="text" value="*****"/>

### Adoption type

Enable proxy for C, CX devices  
Select if your ClickShare devices are in restricted network.

Next 



Image 2-19

- Direct connection for XMS Edge and Proxy connection for ClickShare Base Units.

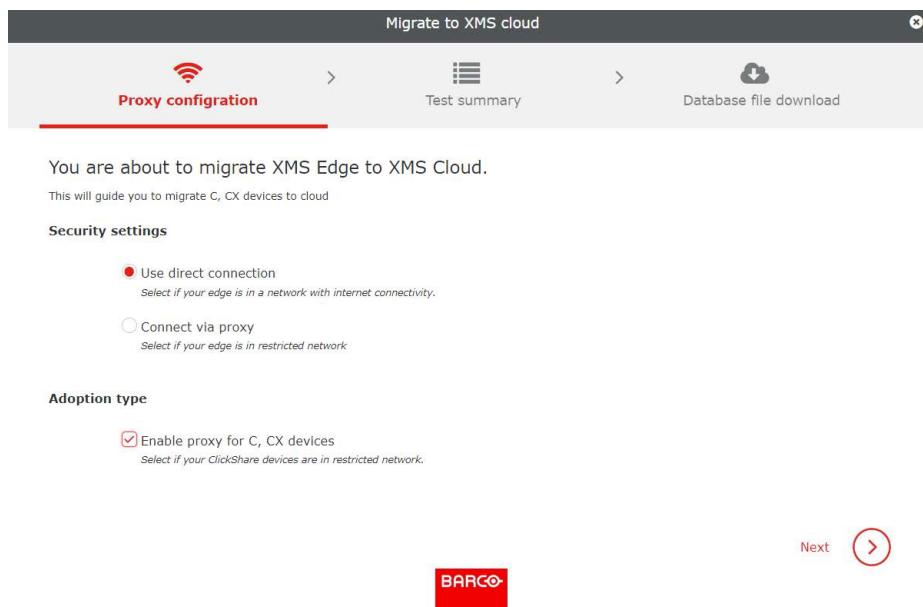


Image 2–20

The total number of Base Units discovered for migration will be shown under the “Connected column” in the “**Test summary**” tab.

Total	Connected	Disconnected	Actions
2	2	0	All set. Press next to proceed further

Image 2–21



*Note:* Undiscovered Base Units will be shown under the *Disconnected* column, download the CSV file next to it for analyzing the undiscovered Base Units. [Optional] After making the necessary correction, click the refresh icon within the **Test summary** tab to fetch the corrected Base Units.

## 6. Click **Next**.

The database configuration file will be downloaded to your local machine and then you will be redirected to the XMS Cloud.

## Configuring migrated Base Units in XMS Cloud

### 1. Click on the **Add** drop-down list and select *Add Base Unit*.

## Header

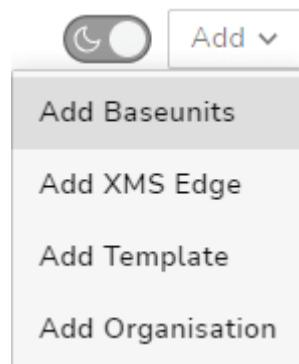


Image 2-22

The Add Base Unit window is displayed.

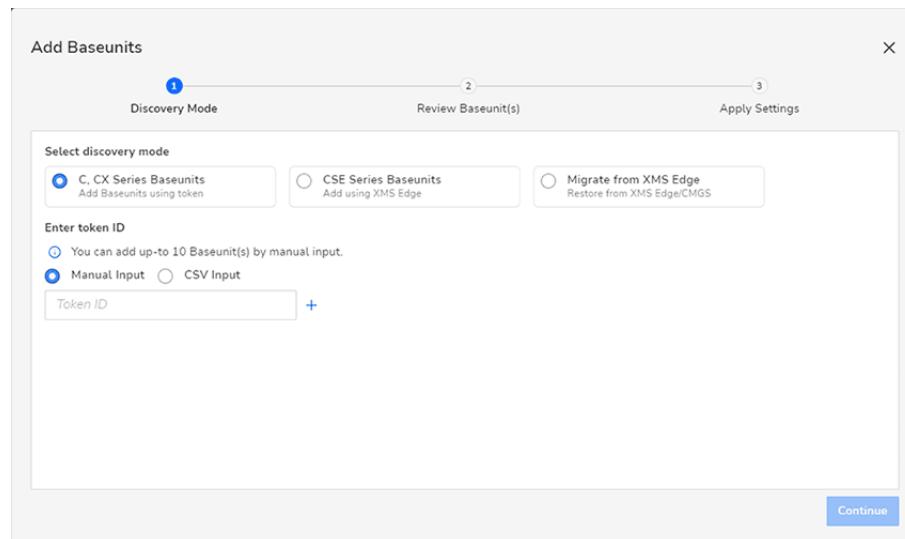


Image 2-23

2. Select *Migrate from XMS Edge*.
3. Select the desired XMS Edge space.

 **Note:** Make sure at least XMS Edge is available.

The detail window will adapt accordingly.

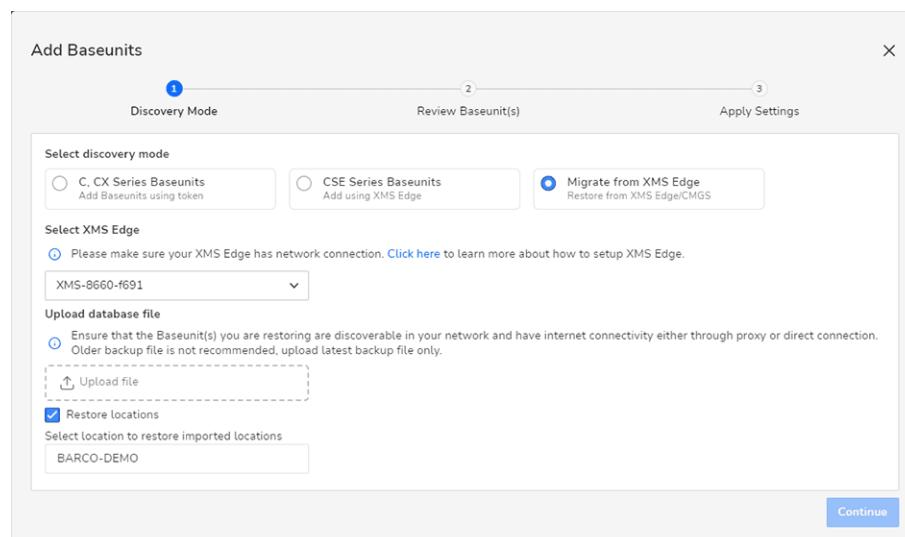


Image 2-24

4. Select your XMS Edge from the drop-down list.
5. Click **Upload file** to upload the previous downloaded file.  
Alternatively, you can also drag and drop the downloaded file into the *Upload file* field.
6. Select restore locations to immediately import the units to a specific location in the current space.  
If selected, a field picker option will become available at the bottom of the window. Click on it to choose the desired location.

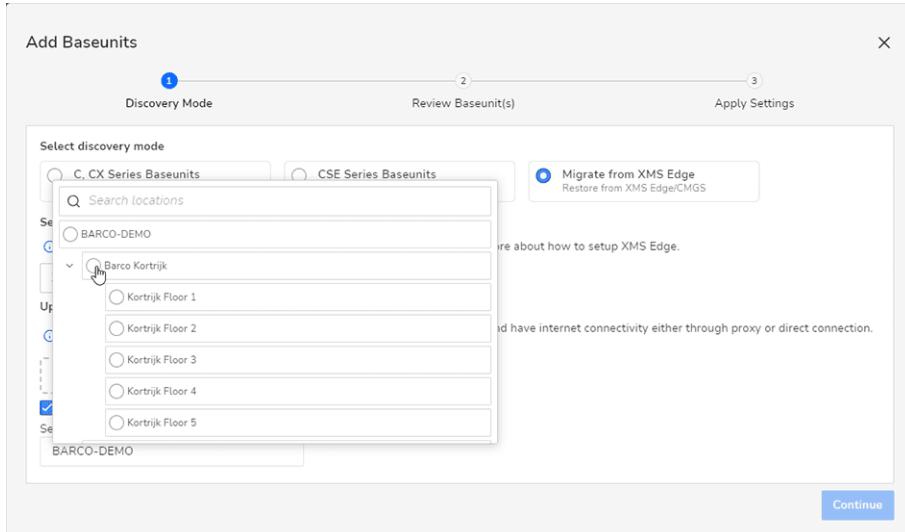


Image 2-25 Example of the location picker

7. Click **Continue**.

The Base Units discovery and registration process start automatically. Please wait until the process is completed.

Once completed, the discovered units will be listed in two ways:

- A list of Base Unit devices with “errors/warnings”. These are devices that cannot be added to XMS Cloud or cannot be reached.
- A list of “*Discovered Base Unit devices*” that will be added to XMS Cloud once completed.

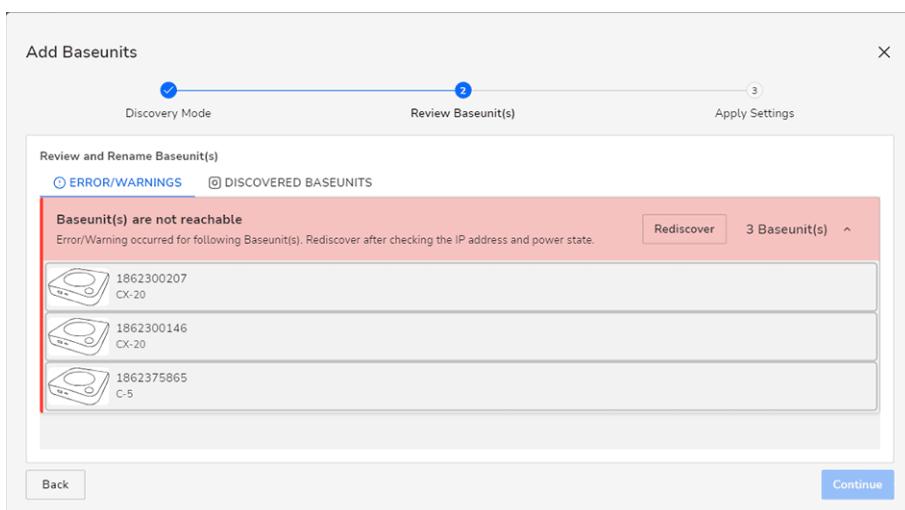


Image 2-26 Example of Base Unit devices that cannot be reached.

8. In case of Base Unit devices that cannot be reached, resolve the connectivity issues (power, network or other issues) and click **Rediscover** to add them to the list of discovered devices.
9. Click **Continue**.

The Apply Settings window is displayed.

**10.** On the Apply Settings page, you can select the location where the Base Unit devices will be located. Clicking on *Select Location* will open a location selector, using the locations of the current Organisation.

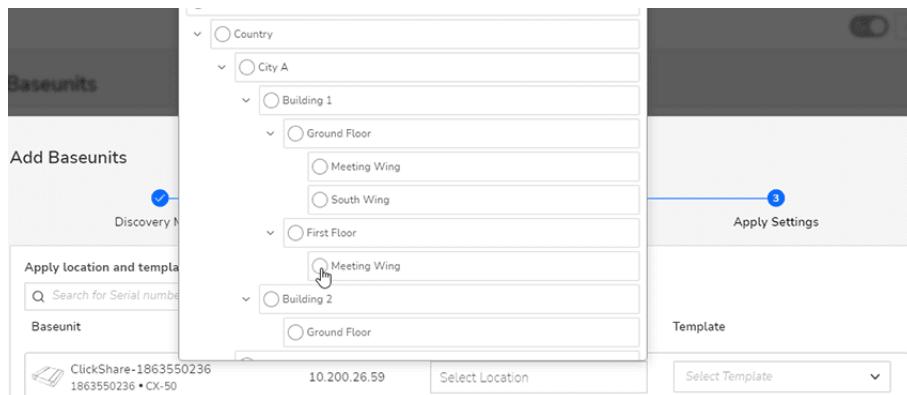


Image 2-27

**11. Click Register.**

All listed devices are registered in the system and added to the list of Base Unit devices.

## 2.3.2 Add XMS Edge

### How to add

**1.** Click on *add XMS Edge*.

The *Add XMS Edge* window is displayed.

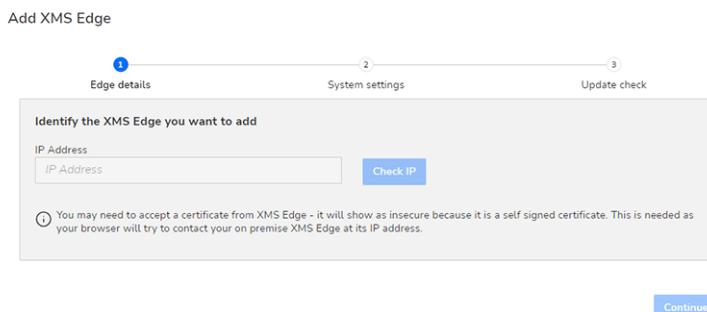


Image 2-28 Example of the Add XMS Edge window

**2.** Fill in the IP Address of the desired XMS Edge environment.

**3.** Click **Check IP**.

 **Note:** XMS Edge will show up in your browser with the warning of it being an insecure connection. This is expected behavior because XMS Edge has a self-signed certificate. Accept the certificate from XMS Edge in order to continue.

**4.** Log in to XMS Edge with the desired credentials.

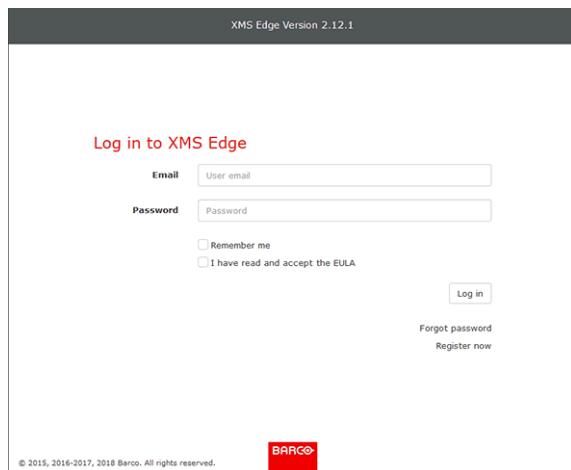


Image 2-29

Once correctly and fully logged in, you will return to the *Add XMS Edge* Window.

5. Click **Continue**.
6. On the system settings page, If you have a proxy server installed, fill in the credentials (optional) and click **Continue**.
7. Once a final firmware upgrade check is done on the firmware, click Continue to finish the procedure.

### 2.3.3 Add template

#### How to add

1. Click on *add template*.

Image 2-30 Create new Template window.

The *Create new Template* window is displayed.

2. Fill out the basic template details:
  - *Template Name*: Create a clear name.
  - *Device type*: Choose the Base Unit device type this template will apply to.
    - CS/CSE
    - C/CX
  - *Template description*: Optionally, you can give a more description for the template.
3. Click **Continue**.

The Configuration settings page is displayed.

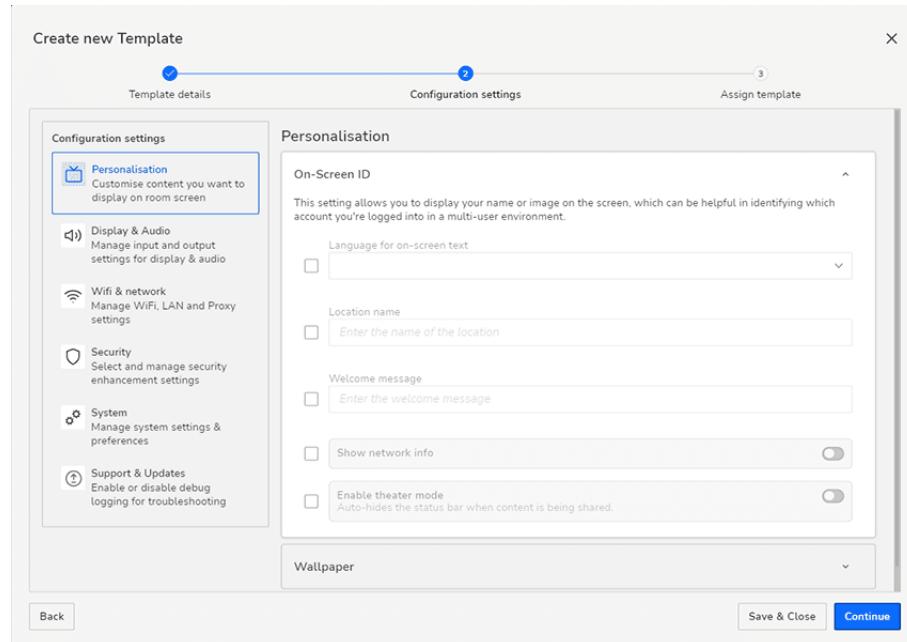


Image 2-31 The Configuration settings page.

4. Fill in all the desired details this template will have.

 **Tip:** Every item here is optional. Only select or fill in the fields that will make this template stand out compared to the standard settings (e.g. have custom wallpaper and welcome message per location).

5. Once all desired items have been entered, do one of the following:

- ▶ Click **Save & Close** to save this template without applying it to existing devices in the space. If clicked, go to the last step.
- ▶ Click **Continue** to assign this template to existing devices in the space. If clicked, go to step 6.

If **Continue** is clicked, the *Assign template* page will be displayed.

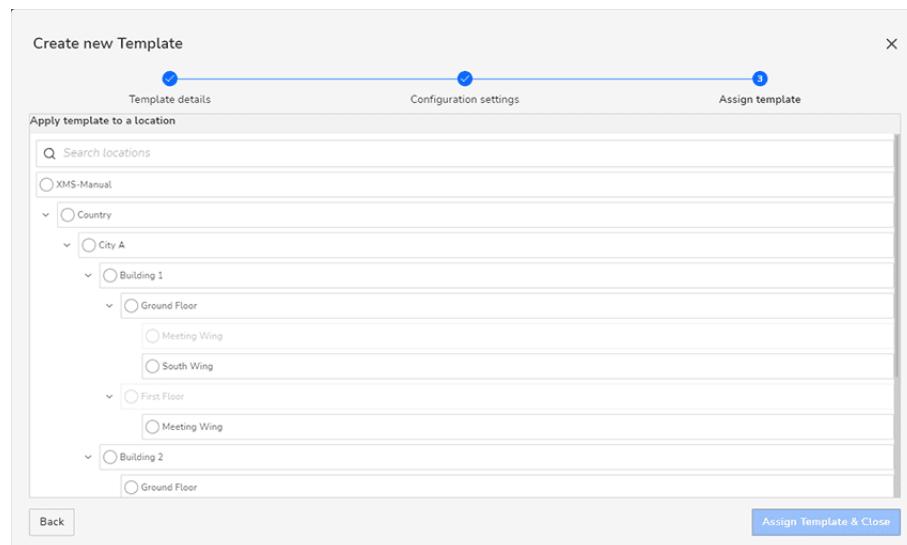


Image 2-32 Example of the Assign template page

6. Select the desired location you want to apply the template to.

7. Click **Assign Template & Close**.

The template will be applied to all Base Unit devices linked with the selected location.

8. The *Templates* page is displayed, with the new template added to the list of available templates.

## 2.3.4 Add organisation

### About an organisation

An organisation is a new XMS Cloud location, where adding and managing ClickShare devices is possible.

### How to create

1. Click on the *Add* drop down and select *Add organisation*.

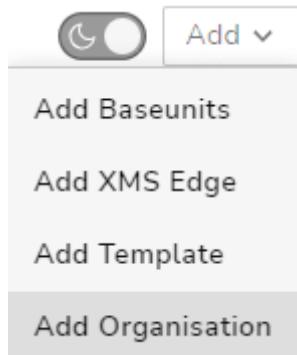


Image 2-33

Welcome to XMS Cloud

Before you can start using XMS Cloud to manage your resources, we need to take care of some housekeeping stuff.

Organisation Account name

Country

Timezone

I have read the [terms & conditions](#) of the End-User License Agreement & hereby accept them

Image 2-34

A welcome page is displayed.

2. Enter the account name of your organization in the field *Organisation Account name*.
3. Select the corresponding country and time zone.
4. Before you continue using XMS Cloud you have to read and accept the terms and conditions of the End User License Agreement. When you accept, check the check box and click **Continue to the XMS Cloud**.

The System Dashboard window will be displayed. But the Add Base Unit window will be prompted.

If you have the ID list of your Base Unit at hand, or if you are migrating from XMS Edge, you can continue with the Add Base Unit procedure.

If not, you can press the close icon in the top right and browse the XMS Cloud environment instead.

## 2.4 Organisation menu

### How to select

1. Click on the down list next to the Add button (with the current organisation name).  
 If more than one organisation is available, the list of available organisation spaces will be displayed.

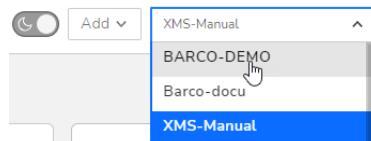


Image 2-35 Example of the list of available organisations

**2.** Select an existing organisation out of the list.

The dashboard for the selected organisation is displayed.

## 2.5 Notification hub

### Overview

If a special event occurs in your environment, a notification message will be marked in your space. You can see this list of (unread) notifications when you click on the Bell icon on the top of the window.

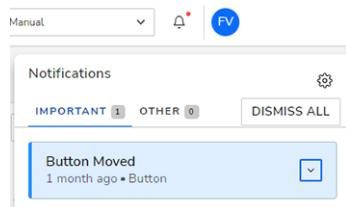


Image 2-36 Example of a Notification

If you click on the configuration icon in the Notification pop-up window, the *Edit notifications settings* window will be displayed. In this window you can select for what type of events you will receive a notification, either in-app or via e-mail. The events can be the following:

- Base Unit device events
- Client button events
- Cloud services events
- Barco news
- XMS Cloud software update information (What's new)
- Survey requests

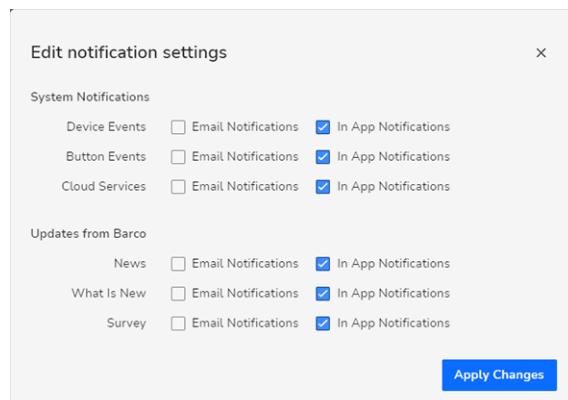


Image 2-37 Notification settings

## 2.6 User menu

### 2.6.1 About user menu

#### Overview

The user menu is a menu that shows information or allows settings changes that are specific to the current user logged in.

Click on the logged in user's name to open the user menu.

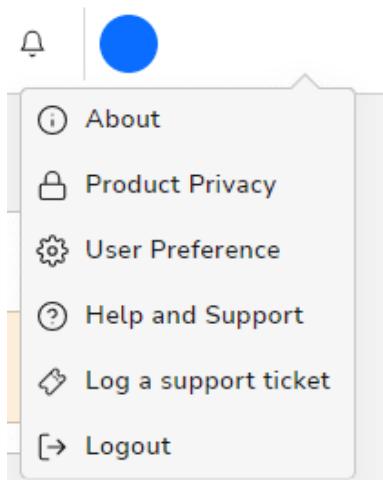


Image 2-38

### 2.6.2 XMS Cloud about

#### XMS Cloud information

Some features or bug fixes can be available depending on the XMS Cloud version. To find out which version XMS Cloud is currently on, click on the “About” option in the user menu.

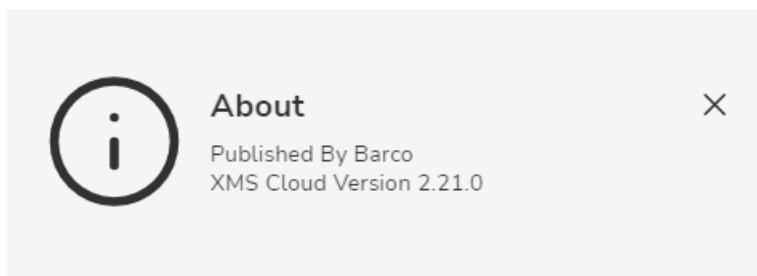


Image 2-39

### 2.6.3 Product privacy

#### About product privacy

Clicking on *Product Privacy* will lead you to the Product privacy statement web page of the Barco website.

A red dot appearing before *Product Privacy* indicates that there is an update of the product privacy statement.

Click on the red dot will lead you to the updated privacy policy so you can read it. The red dot disappears after viewing and reading the update policy.

## 2.6.4 User preference

### Usage statistics

By default, XMS Cloud collects product usage data. All collected statistical data is pseudonymized and is only used in order to help improve XMS Cloud in future versions.

However, users have the option to opt out of this statistical data collection in XMS Cloud.

Select the *User Preferences* from the drop-down menu.

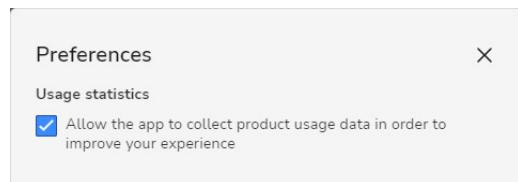


Image 2-40

The *Preferences* dialog pop-up.

- To allow the app to collect the info, keep the check box selected.
- To block the app from collecting data, make sure the check box is not deselected.

## 2.6.5 Help and support

### About help and support

Provides a direct link to the product support page on the Barco website.

## 2.6.6 Log a support ticket

### About log a support ticket

Provides a direct link to log a support ticket with Barco for additional support.

## 2.6.7 Logout

### About logout

Logs the current user out of XMS Cloud. The login page will be displayed to allow another user to log in.

# 3

## Home

3.1	About Home .....	34
3.2	Dashboard .....	34
3.3	Events .....	38
3.4	Scheduler .....	39

## 3.1 About Home

### Overview

The home category contains the basic features of XMS Cloud. It is subdivided in 3 other categories:

- Dashboard (Landing page of XMS Cloud)
- Events
- Scheduler

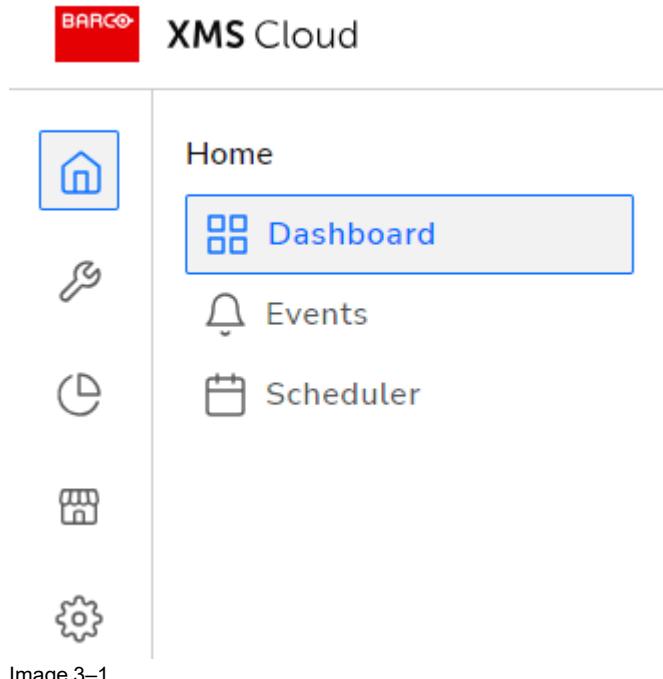


Image 3-1

## 3.2 Dashboard

### 3.2.1 About dashboard

#### Overview

Landing page of XMS Cloud which displays an easy overview of the ClickShare system for the selected organisation:

- Device status overview
- Firmware distributions
- Base Unit usage trends
- Infrastructure overview
- Base Unit onboarding
- System health
- Scheduled jobs

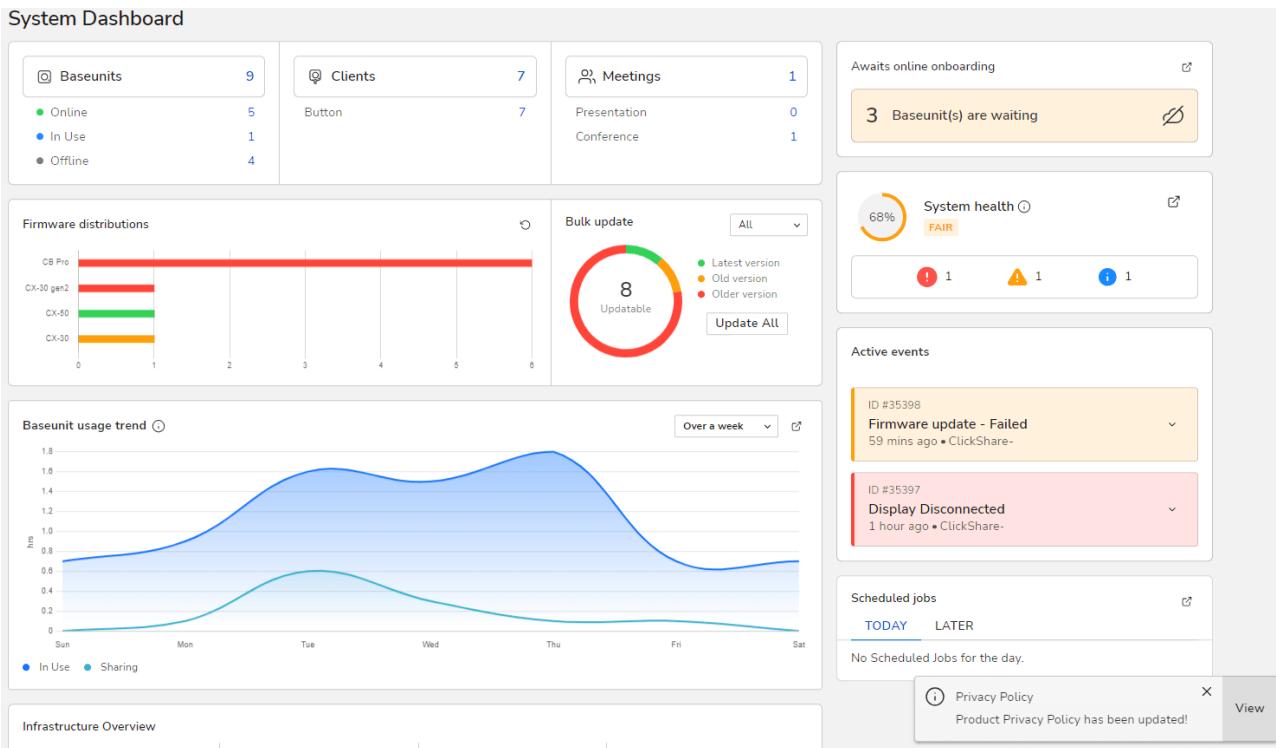


Image 3–2 Dashboard example

### 3.2.2 Device status overview

#### Overview

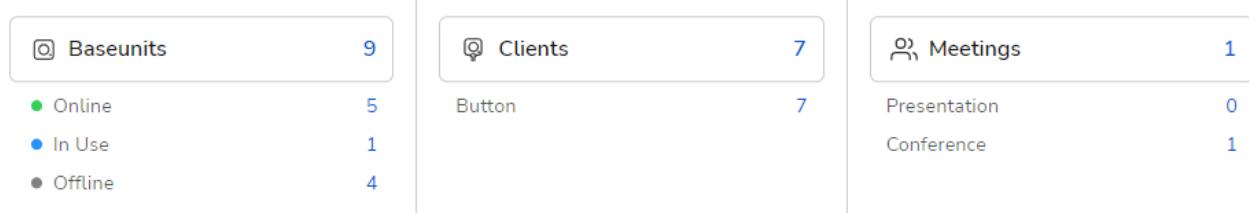


Image 3–3 Example of the device status overview

The device status pane indicate the status of all registered Base Unit and Button devices for the selected organisation

It indicates:

- The total number of Base Unit devices
- The total number of Button devices
- The number of connected/online devices
- The number of disconnected/offline devices

#### Device selection

- To have an overview of all Base Unit devices click on the number next to *Base Units*. For more information how to continue, see “[Base Units](#)”, [page 45](#)
- To have an overview of all Button devices click on the number next to *Clients*. For more information how to continue, see “[Clients](#)”, [page 61](#)
- If you only want to see an overview of the connected device, click the number next to **Online**.
- To see an overview of the disconnected devices, click the number next to **Offline**.
- To see only the shared devices, click on **In Use**.

The value inside the button indicated the number of devices in this state.

### 3.2.3 Firmware distributions

#### About firmware distribution

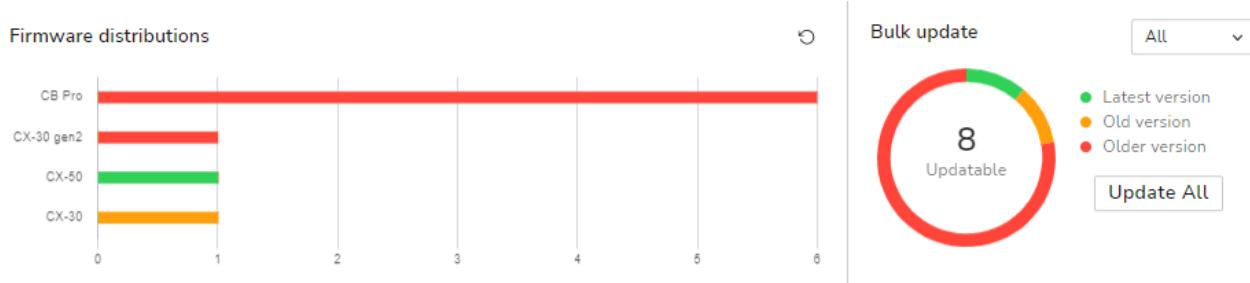


Image 3–4 Example of the Firmware distribution pane

The Firmware Distribution pane shows per device type the number of devices connected to XMS Cloud and their software status. Multiple colors per line are possible.

The following colors are used:

- **Green**: devices are running on the latest released software.
- **Orange**: devices are running on a slightly older software version. There are already one or two releases not installed.
- **Red**: devices are running on a old software version.

To see specific information of a device, use the drop-down list next to *Bulk update* and select the desired device type. For more information about the device window, see “[Base Units](#)”, [page 45](#)

To upgrade all devices in orange and red, click on **Update all**.

### 3.2.4 Base Unit usage trend

#### Overview

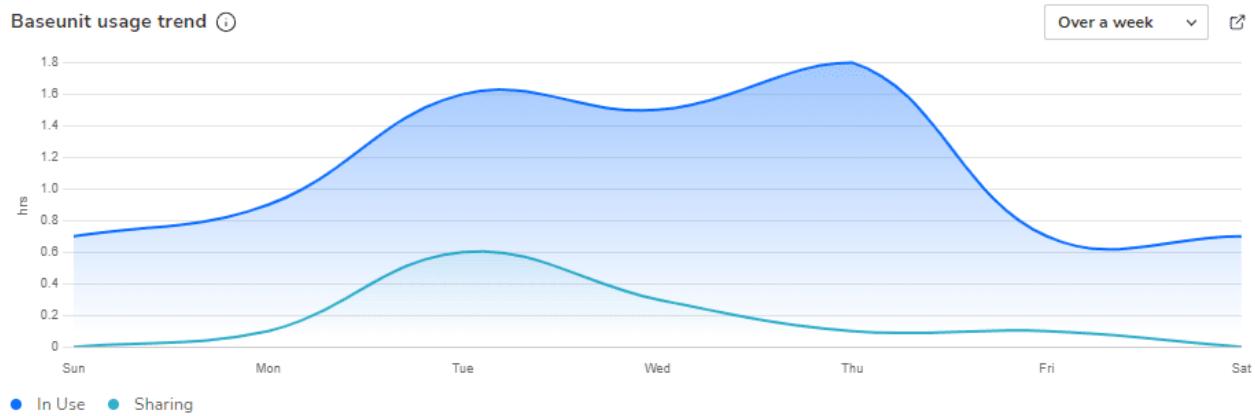


Image 3–5 Example of the usage trend pane

The Base Unit usage trend pane displays the usage of the connected Base Unit devices in a graphical form. The graph gives an indication of the time the devices are in use, as well as the time the device is used to share content.

The graph displays average usage of all Base Unit devices on a daily basis (weekly view), or on hourly basis (daily view). The last 30 days of data is used for calculating the average.

By clicking the expand icon in the top-right corner of the pane, you will be redirected to the Usage Insights page. For more info, see “[Usage insights](#)”, [page 74](#)

## 3.2.5 Infrastructure overview

### Overview

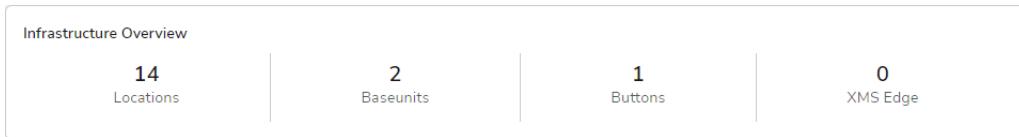


Image 3–6 Example of the Infrastructure overview pane

In the Infrastructure overview pane you can see the overview of locations, Base Units and Buttons in your current organisation. Clicking on any of the numbers in the overview will redirect to its appropriate page.

By clicking on the number of locations, you will be redirected to the Locations page. For more info see “[Location](#)”, page 69

By clicking on the number of Base Unit devices, you will be redirected to the Base Unit page. For more info see “[Base Units](#)”, page 45

By clicking on the number of Button devices, you will be redirected to the Button page. For more info see “[Clients](#)”, page 61

By clicking on the number of XMS Edge devices, you will be redirected to the XMS Edge page. For more info see “[XMS Edge](#)”, page 62

## 3.2.6 Base Unit onboarding

### Overview



Image 3–7 Example of Base Unit that have been onboarded

The amount of new Base Units that have been onboarded with the QR code during installation and are awaiting additional steps will be shown here.

Information about the connected Base Unit and the steps that are still required to complete the onboarding can be found by clicking the expand icon in the top-right corner. For more info, see “[Waiting](#)”, page 59

## 3.2.7 System health

### Overview

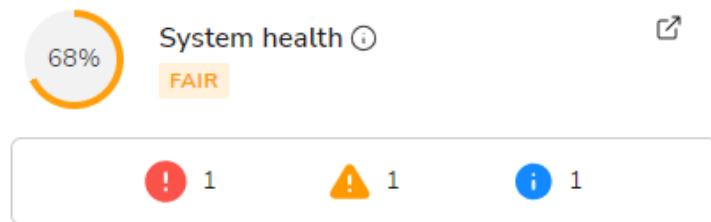


Image 3–8 Example of the System health pane

In the System health pane, you can see if any problems are present in one of your Base Unit devices. If none of the devices have issues, the System health will be marked as “good”.

By clicking the expand icon in the top-right corner, you will be redirected to the *System events* page. For more info on this, see “[Events](#)”, page 38

## 3.2.8 Scheduled jobs

### Overview

The screenshot shows a pane titled 'Scheduled jobs' with a 'TODAY' tab and a 'LATER' tab (which is selected). Below the tabs, a card displays a scheduled job: 'SCHEDULED' at '5:15 PM', 'Reboot Baseunit(s)', '1 Baseunit(s)', and 'July 19, 2023 at 8:14 AM'.

Image 3–9

In the Scheduled jobs pane you can see which jobs are scheduled either *Today*, or *Later* in the week.

By clicking on a scheduled job, you can see the details of the job. You can also cancel the job if it cannot proceed.

Outside of canceling, you cannot change the scheduled jobs using this pane.

But by clicking on the expand icon in the top-right corner, you will be redirected to the Scheduler page. For more info, see “Scheduler”, page 39

## 3.3 Events

### Overview

The general overview page of the most recent info, warning or critical error event that has happened across the ClickShare fleet for the selected organisation.

The screenshot shows the 'System events' page. On the left, there's a summary section with a 'System health' indicator (63%, FAIR), a 'Events summary' box showing 2 Critical errors, 1 System warnings, and 3 Info events, and a 'Filter by event types' sidebar with options for Firmware events, Peripheral events, Button events, Display events, and Baseunit events. On the right, a list of events is displayed with search and filter controls at the top. The events are listed in a scrollable table:

ID	Type	Details	Timestamp
ID #35403	Firmware update - Success	ClickShare-	2 mins ago
ID #35402	Firmware update - Success	ClickShare-	18 mins ago
ID #35401	Display Disconnected	updating555	33 mins ago
ID #35400	Display connected	updating555	1 hour ago
ID #35398	Firmware update - Failed	ClickShare-	1 hour ago
ID #35397	Display Disconnected	ClickShare-	1 hour ago
ID #35383	Firmware update - Success: Dismissed	ClickShare-	2 days ago
ID #35382	Button - Pairing success: Dismissed	ClickShare-	2 days ago

Image 3–10 Example of the System Events page.

## How to view system events

1. If system event messages are present, you can click on these to see details.
2. If too many notification messages are listed, you can filter them by event type. Do this by clicking on the event type:
  - Critical errors
  - System warnings
  - Info events
3. Alternatively, you can also filter by event type (e.g. firmware events, Button events, etc).

## 3.4 Scheduler

### 3.4.1 About scheduler

#### Overview

The screenshot shows the XMS Cloud Scheduler interface. On the left is a sidebar with icons for Home, Dashboard, Events, and Schedule (which is selected). The main area is a calendar for July 2023. A red arrow labeled 1 points to the calendar grid. A red arrow labeled 2 points to the 'Today' button. A red box labeled 3 highlights a scheduled job for July 20th. A red arrow labeled 4 points to the '+ Add' button. A red arrow labeled 5 points to the 'Refresh' button.

Image 3-11 Example of the Scheduler overview

1	Overview of calendar with all scheduled jobs (if any)	4	Add new Job button
2	Month selector and “force to today” button	5	Refresh button
3	Scheduled job(s) for selected day (if any)		

### 3.4.2 Add new scheduled job

#### About adding or creating a new job

A job can be created and scheduled to be executed somewhere in the near or distant future.

#### How to create a new job

1. Within *Scheduler*, click on **+ Add**.

Create new schedule

1 2

Schedule details Select Baseunit(s)

Event title

Description Optional

Select action

Start date (Your local time)

Occurrence

**Continue**

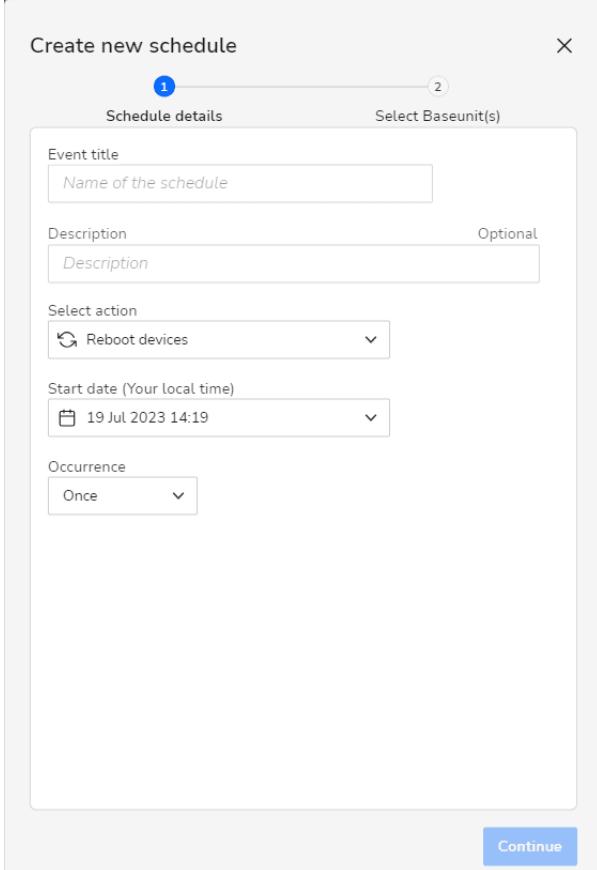


Image 3-12 Example of the Create new job window.

The *Create new schedule* window is displayed.

2. Fill out information about the schedule:
  - a) **Event title**: title of the job.
  - b) **Description**: description of the job (**optional**).
  - c) **Select action**: what the action must be triggered by the job.
  - d) **Start date**: date the job must be executed.
  - e) **Occurrence**: frequency that the job must be repeated.
3. Click **Continue**.

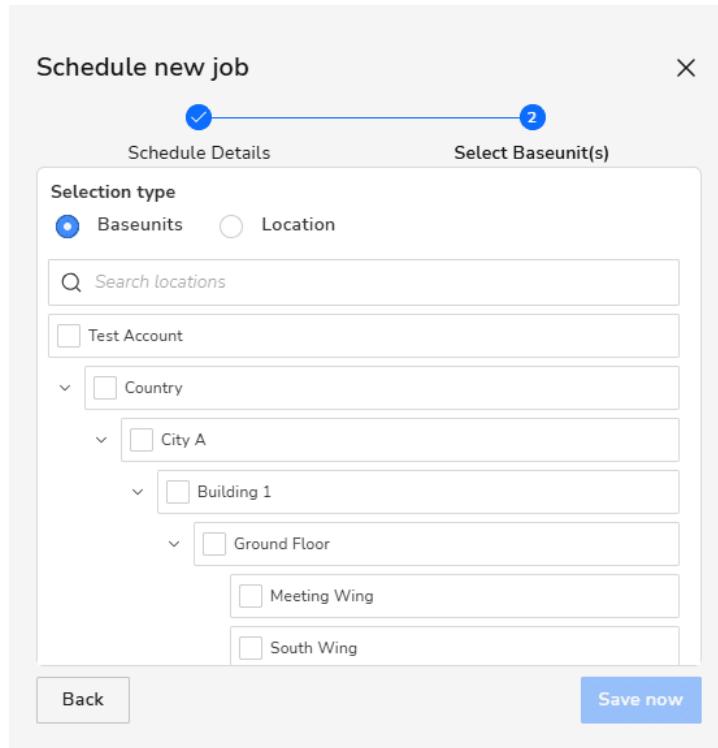


Image 3-13 Example of the Select Base Unit tab page.

The Select Baseunit(s) tab will be displayed.

4. Must the job be run dependant on location or Base Unit?
  - If **no**, click on the radio button in front of “Baseunits”.
  - If **yes**, click on the radio button in front of “Location”.

 **Note:** Any new Base Unit(s) that get added to the location will also be included when the job is executed. Any removed Base Unit(s) will no longer follow the job.

5. Select the options where the job must be run.

 **Tip:** Search for entries by typing in the input field below the radio buttons.

6. Click **Save Now** to save the job and add it to the scheduler.

### 3.4.3 Cancel job



Only jobs with the status *scheduled* can be canceled.

#### How to cancel

1. Browse through the Scheduler and click on the day with the undesired job.  
The jobs scheduled for this day will appear in the right-hand side of the window.
2. Click on the undesired job.  
The job detail window will be displayed.

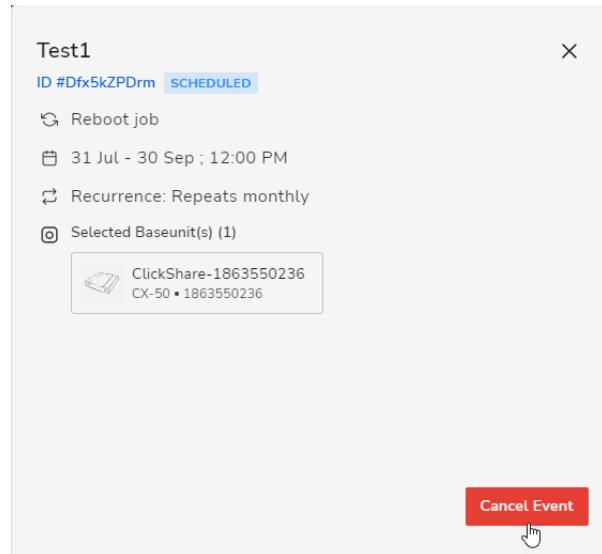


Image 3-14 Example of the job detail window

**3. Click Cancel Event.**

The job will be canceled but remains in the job list with status Canceled.

### 3.4.4 Refresh

#### About refresh

Clicking the refresh button will reload the entire scheduler to ensure that the latest changes are displayed correctly.

# 4

## Manage

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4.5	XMS Edge .....	62
4.6	Templates .....	67
4.7	Location .....	69
4.8	Microsoft calendar .....	71

## 4.1 About manage

### Overview

The manage category allows for quick and easy managing of devices and general settings:

- Base Units
- Waiting
- Clients (Buttons)
- XMS Edge
- Templates
- Locations
- Microsoft calendar (when the plug in has been added). For more information, see “[Calendar integration](#)”, [page 83](#).

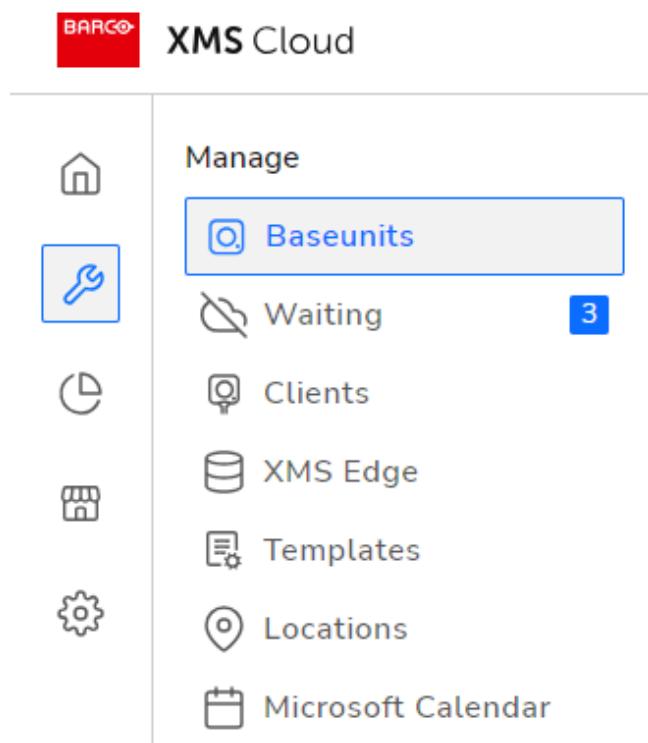


Image 4–1 Example of the manage category

## 4.2 Base Units

### 4.2.1 About Base Units

#### Overview

Image 4-2

<b>1</b> Device selection check boxes <b>2</b> Base Unit type selector <b>3</b> Base Unit search box	<b>4</b> Location tree overview <b>5</b> Refresh button <b>6</b> Export button
--	--

Each line represents a device. The following information is given:

- **Icon:**
  - The icon for the listed device is an image of the Base Unit device type
  - Once you hover over the icon, it changes into a selection check box.
- **Base Unit:**
  - Hostname: “ClickShare-” + the serial number is the default. Can be changed afterwards.
  - Serial number of the device
- **Location:** Lowest level on the location selection tree
- **IP address**
- **Firmware version:**
  - Yellow icon: A new upgrade of the firmware is available
  - Red icon: Firmware is running more than one version behind the latest available version. An upgrade of the firmware is required
  - No icon: device is running the latest firmware.
- **Health (on C or CX device):**
  - Green icon: Health is good. No moderate or critical events triggered on devices.
  - Red icon: Health is poor. There are critical events on the device.
  - Orange icon: Health is moderate. There are moderate events triggered on device.
- **Health (on CS or CSE device):**
  - Green icon: Health is good. Device is connected and works properly.
  - Red icon: Health is poor. There are critical events on the device
  - Orange icon: Device is controlled by another XMS
- **Connection.** Indicates the connected source
  - Green label: unit is in use.
  - Grey label: unit is offline

## 4.2.2 Search and select

### Search Base Units

Enter one of the following items in the search bar:

- Base Unit name
- Serial number
- Firmware version
- Connection status

The moment you start typing the selection will be filtered.

The screenshot shows a search interface for 'Baseunits'. At the top, there is a search bar with the text 'in use'. Below the search bar, there are tabs for 'ALL', 'CX-20', and 'CX-50'. The 'ALL' tab is selected. The main table has columns for 'Baseunit', 'Location', 'IP Address', 'Firmware', 'Health', and 'Connection'. The 'Connection' column contains a status indicator for each device. A red box highlights the 'IN USE' status for the first device, 'ClickShare-1863550236'. The table shows one total device.

Image 4-3 Example of searching for “in use” devices

Alternatively, you can select one of the device name tabs to filter out all devices of this specific type.

### Selecting a Base Unit

Select the check box in front of the unit you want to select. If you hover over the Base Unit icon, the icon will transform into a check box.

Multiple selection are possible. To select all devices at once, check the check box on top of all check boxes.

The moment a device or multiple devices are selected, different functions become available. Functions which are not available are grayed out.

## 4.2.3 Export

### About exporting

Exporting allows for the creation of “.csv” files containing data of Base Units connected to the XMS Cloud. It is possible to select which specific data should be exported and for which Base Units depending on the needs.

### How to export

1. Decide if the data must be exported for all or specific Base Units.
  - For all Base Units, click the “Export” button without having any Base Units selected.
  - For desired Base Unit(s) only, select the applicable Base Unit(s) and click the “Export” button.

The screenshot shows a dialog box titled 'Export csv for all Baseunit(s)'. It contains a list of data types with checkboxes. Most checkboxes are checked, except for 'SSID', 'Hostname', and 'Retain Baseunit Settings'. At the bottom, there are 'Select All' and 'Export Now' buttons.

Image 4-4



**Note:** If not all Base Units were selected, then the pop-up window will show how many were selected that will be included in the export.

2. Select or deselect which information that must be included or omitted in the export.
3. Click “Export Now” to create and save the “.csv” file to a location of choice.

## 4.2.4 Manage

### How to edit

1. In the Base Unit device overview, click on the Manage icon for the desired device.

Image 4–5 Example of Base Unit devices, hovering over the Manage icon.

The Manage Base Unit window is displayed.

Image 4–6 Example of the Manage Base Unit window.

2. Review or change the desired settings.



Depending on the selected ClickShare model different settings may be visible. Certain settings will be visible but only as read-only information. But in general the basic configuration settings possible on the device itself can be done via XMS Cloud. For more information about a specific setting, consult the device's installation manual which can be downloaded from Barco's website. IP settings and source settings can only be changed on the local device.

### What settings can be managed

Clicking on the configure icon of one of the Base Unit devices will redirect you to the Manage Base Unit window for said device.

The full configuration of the device can be filled in, reviewed and/or changed.. This is the following:

Tab page	Menu	Pane	Explanation
General		Location	Reviews the Location this Base Unit is located at. Click on the <b>Change Location</b> button to change the location using the Location selector.
		Template	Assign a template. For more info, see " <a href="#">Edit and assign</a> ", page 67
		Base Unit health	Check the health of the Base Unit. For more info, see " <a href="#">Events</a> ", page 38
		Screen view	Shows the information that will be displayed on the screen the Base Unit device is connected to. You can only change the Wallpaper by hovering over the wallpaper image and clicking on the <b>Change Wallpaper</b> button.
		Details	Shows the technical details of the Base Unit device. This includes article number, MAC address, hostname, SSID, Frequency, Channel, Time zone, logging level, security and Energy mode.
		Scheduled Jobs	Check which jobs are scheduled for the Base Unit. Clicking on the Expand icon will lead you to the Scheduler. For more info, see " <a href="#">Scheduler</a> ", page 39.
		ClickShare Button	Shows the list of Button devices paired with the Base Unit device, as well as the current status of de devices. Clicking on the Expand icon will lead you to the Clients page. For more info, see " <a href="#">Clients</a> ", page 61.
Configuration	Personalisation	Peripherals	Shows all peripherals connected to the Base Unit. The following general information about the peripherals is also shown: <ul style="list-style-type: none"> <li>• Name of the peripheral</li> <li>• Status of the peripheral</li> <li>• Firmware version</li> <li>• Firmware compatibility status</li> <li>• Status of the peripheral components</li> <li>• Activity log</li> </ul>
		On-Screen ID	Type of On-Screen ID: <ul style="list-style-type: none"> <li>• Small</li> <li>• Standard</li> </ul> Settings to be displayed on the Screen: <ul style="list-style-type: none"> <li>• Language for on-screen text.</li> <li>• Meeting room name (hostname): Default is "ClickShare- "+serial number</li> <li>• Welcome message</li> <li>• Show network info (on/off slider)</li> <li>• Enable theater mode (on/off slider)</li> </ul>
	Display (& Audio)	Wallpaper	You can only change the Wallpaper by hovering over the wallpaper image and clicking on the <b>Change Wallpaper</b> button.
	Outputs	<ul style="list-style-type: none"> <li>• Resolution</li> <li>• Enable CEC (on/off slider)</li> <li>• Enable audio (on/off slider)</li> <li>• Screensaver timer</li> </ul>	

Tab page	Menu	Pane	Explanation
	Conference bar	Camera	<ul style="list-style-type: none"> <li>• Group Framing</li> <li>• Speaker Framing</li> <li>• Composite Framing</li> <li>• Fixed position</li> </ul>
		Video	<ul style="list-style-type: none"> <li>• Brightness</li> <li>• Contrast</li> <li>• Saturation</li> <li>• Gamma</li> <li>• White Balance</li> <li>• Exposure</li> <li>• Anti flicker</li> </ul>
	WiFi & network	WiFi settings (Read-only)	<ul style="list-style-type: none"> <li>• All WiFi settings (e.g. Operation mode, IP address, SSID, etc).</li> <li>• Wireless client Settings (Operation Mode and pre-configure buttons)</li> </ul>
		LAN settings (Read-only)	<ul style="list-style-type: none"> <li>• LAN Hostname settings</li> <li>• Primary Interface (Method, IP address, subnet Mask, gateway, DNS server)</li> </ul>
	Services		<ul style="list-style-type: none"> <li>• Mobile Devices: Enable/disable sliders for streaming devices (e.g. Chromecast, AirPlay, etc).</li> <li>• Local View: toggle preview functionality in the ClickShare app</li> <li>• SNMP: Enable slider, Engine ID, SNMP manager, name and password</li> <li>• PresentSense: Enable Slider + signal strength</li> </ul>
		Proxy Settings	Enable slider (+ details if enabled)
	Security	Security Level	Security level picker (level 1–3)
	System	Energy Savers	<ul style="list-style-type: none"> <li>• Standby timer</li> <li>• Standby type (ECO mode versus Deep standby)</li> </ul>
		Blackboard	<ul style="list-style-type: none"> <li>• Enable slider</li> <li>• Allow saving to USB slider</li> </ul>
		Date & Time	<ul style="list-style-type: none"> <li>• Timezone</li> <li>• Time format (24 hour versus AM/PM)</li> <li>• NTP server enable slider (+ server location if enabled)</li> </ul>
		Button connects to	<ul style="list-style-type: none"> <li>• Chosen connection mode</li> <li>• USB identification of Buttons as separate (default) or as tied to meeting room</li> </ul>
		Support & Updates	Logging
	Digital Signage <sup>1</sup>	Digital Signage apps	Chosen Digital Signage mode
Insights		Average Base Unit usage	Graph showing the average usage and sharing by a selected time period (a week by default)

1. Only available if plug-in is installed

Tab page	Menu	Pane	Explanation
		Total Base Unit usage by month	Graph showing the total usage and sharing by month
Logs			User logs

## 4.2.5 Reboot

### How to reboot

1. Select one or more Base Unit devices.

The screenshot shows a list of Baseunits in the XMS Cloud interface. The 'Baseunits' tab is selected. A search bar at the top allows searching by BU name, serial number, firmware, health, or connection status. A 'Search for BU name, serial number, firmware, health or connection status' input field is present. Below the search bar are buttons for 'All Locations' and 'Refresh'. The main table lists the following devices:

Baseunit	Location	IP Address	Firmware	Health	Connection	Actions
ClickShare-				Fair	ONLINE	<a href="#">Edit</a> <a href="#">Details</a>
ClickShare-				Poor	OFFLINE	<a href="#">Edit</a> <a href="#">Details</a>
ClickShare-				Fair	ONLINE	<a href="#">Edit</a> <a href="#">Details</a>
ClickShare-				Fair	ONLINE	<a href="#">Edit</a> <a href="#">Details</a>
cs-ext-raodim				Poor	OFFLINE	<a href="#">Edit</a> <a href="#">Details</a>

At the bottom of the table, it says 'Total: 5'. Below the table, a message '1 Baseunit(s) selected' is displayed, followed by a list of selected devices: 'ClickShare-' and 'CX-30 gen2:1'. A toolbar at the bottom includes buttons for 'Reboot', 'Update', 'Change Location', 'Change Template', 'Log a support ticket', and a more options menu.

Image 4-7 Example of selecting a device

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. Click on **Reboot**.

A dialog box will be prompted, requiring confirmation to continue.

3. Click on **Reboot now** to confirm.

The selected devices are rebooting.

## 4.2.6 Update

### How to update

1. Select one or more Base Unit devices.

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. Click on **Update**.

A dialog box will be prompted, requiring confirmation to continue.

3. Click on **Update now** to confirm.

Confirmation The selected devices are updated.

## 4.2.7 Change location

### About changing location

One or multiple devices can be assigned to a location in the location tree or to a new created location in that tree. The creation of a subbranch can be done during the assignment procedure or in *Settings / Location Tree*. For more info about adding, editing or deleting a location, see "["Location", page 69](#)

### How to assign

1. Select one or more Base Unit devices (reference 1).

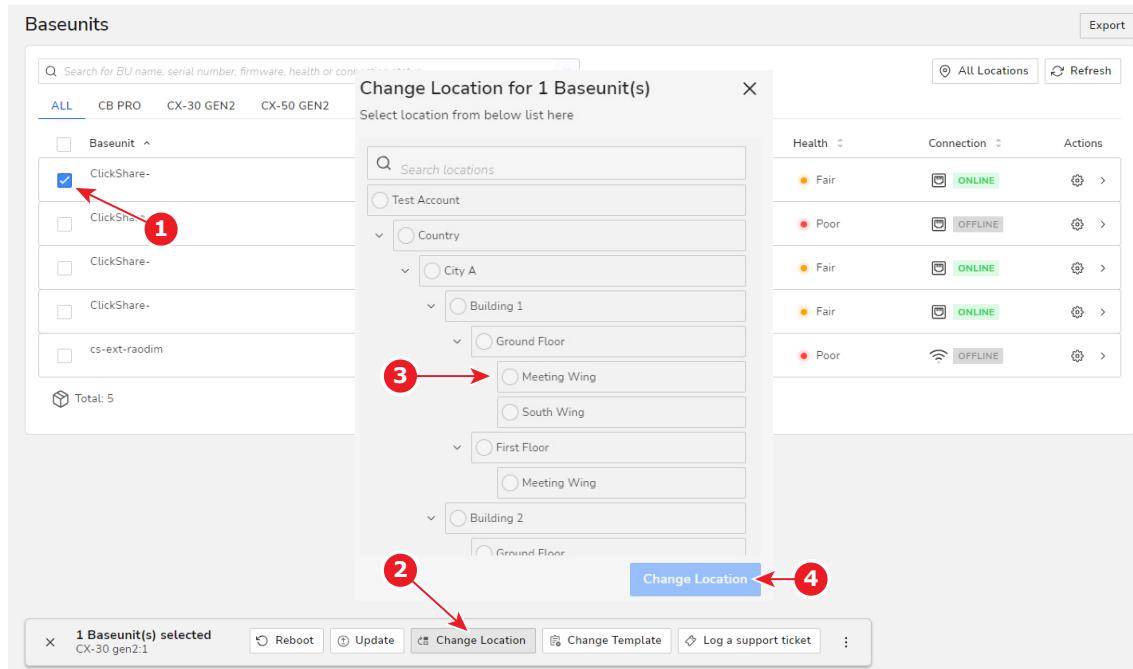


Image 4-8

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. Click **Change Location** in the popup bar (reference 2).

The **Change Location** popup will be prompted.

3. Select the desired location for the selected devices (reference 3).

**Note:** When multiple devices are selected, all devices will be moved to the selected location.

4. Confirm your selection by clicking **Change Location** in the prompted dialog (reference 4).

## 4.2.8 Change template

### About Template

A template contains basic settings from one device which can be used to set up other devices.

### How to assign

1. Select one or more Base Unit devices (reference 1).

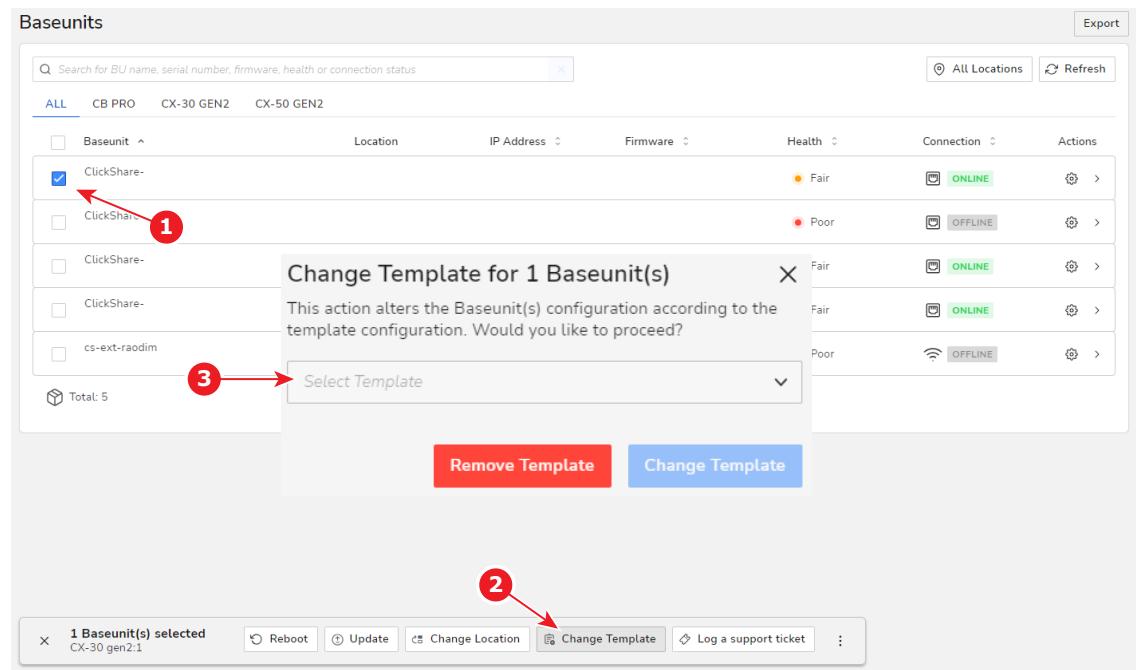


Image 4–9 Example of changing the template for a device

2. Click on **Change Template** (reference 2).

The *Change Template* pop-up is prompted.

3. Click on the drop-down list and select the desired template (reference 3).

Click on **Change Tempalte**.

#### 4.2.9 Log a support ticket

1. Select the one Base Unit (reference 1).

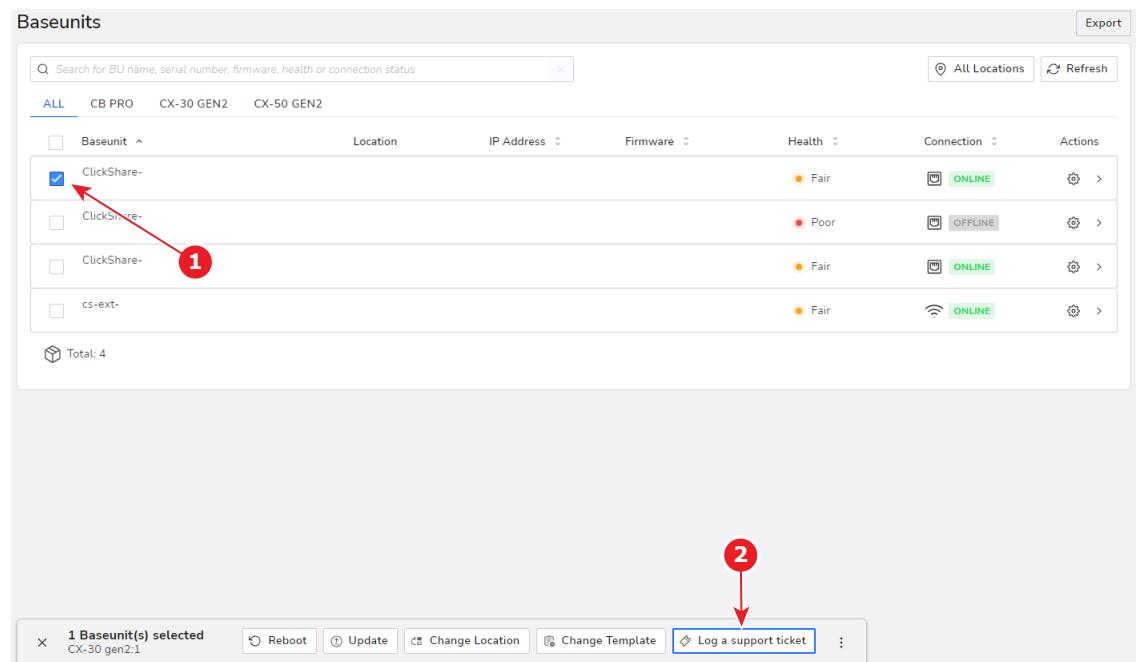


Image 4–10

2. Click on “*Log a support ticket*” (reference 2, Image 4–10).

Data from the selected Base Unit is automatically collected and added to the ticket.

3. Fill out the ticket form

## 4.2.10 Delete Base Units

### About deleting Base Units

One device or multiple devices of the same model group can be removed from your account and will be factory reset. Or, they can be just released from the organisation.

### How to delete

1. Select one or more devices (reference 1).

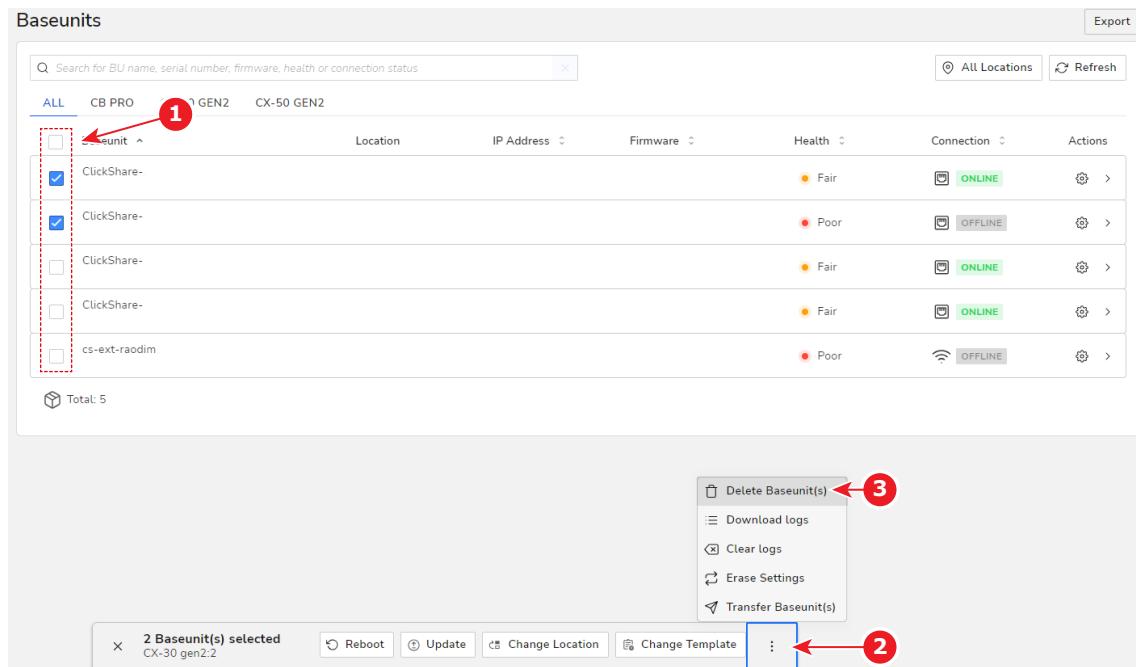


Image 4-11 Example of selecting devices to be deleted

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. In the popup area, click on the settings icon with 3 dots (reference 2).
- Extra options will appear, including the option to delete the Base Unit devices
3. Click Delete Base Unit devices (reference 3).

A confirmation message will be prompted.

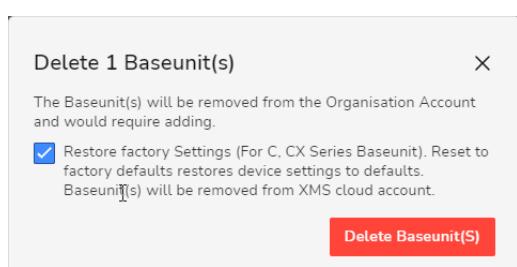


Image 4-12 Example of the confirmation message

4. Choose whether or not to reset the undesired Base Unit device before removing it.  
Leaving this option selected will reset the Base Unit device to the default factory settings after removing it from the current organisation.  
Deselecting this option will keep all current settings in the Base Unit device after removing it from the current organisation.
5. Click Delete Base Unit device(s).

The device will be removed from the list.

## 4.2.11 Download logs

### About logs

When something goes wrong with a devices or multiple devices, log files can be downloaded for one or multiple devices.

### How to download

1. Select one or multiple Base Unit devices.

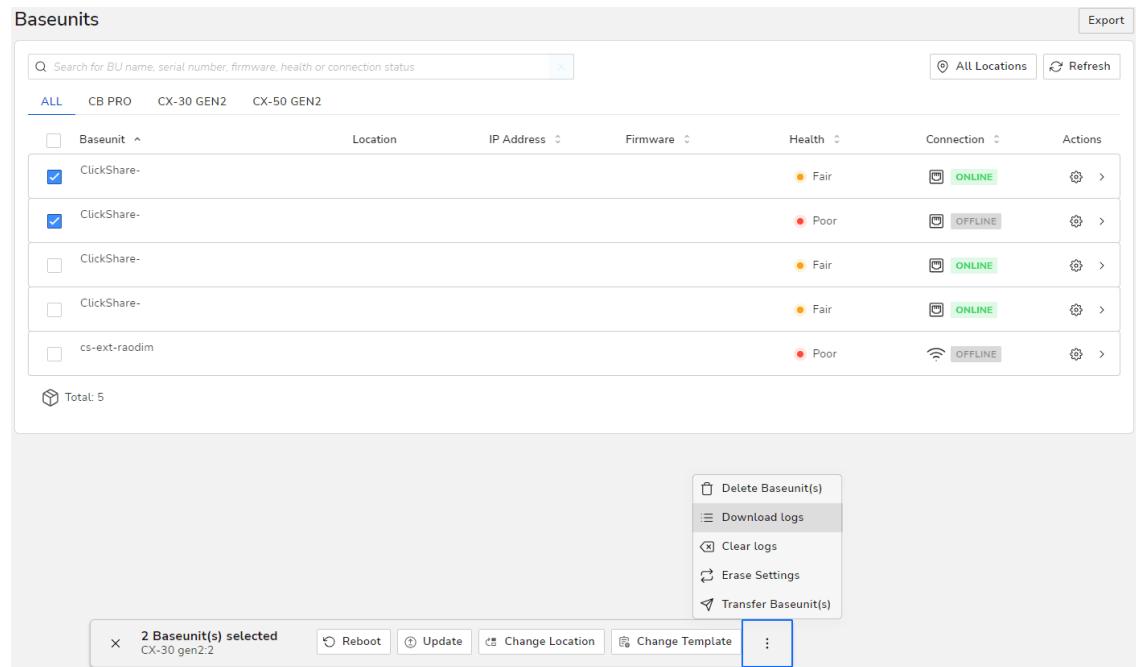


Image 4-13

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. In the popup area, click on the settings icon with 3 dots.

Extra options will appear, including the option to Download the Base Unit log files.

3. Click on **Download Logs**.

A dialog box will be prompted, requiring confirmation to continue.

4. Click on **Download Logs** to confirm.

A log file for each selected device will be created and will be downloaded on your computer. When correctly created and downloaded a green message pop up window appears. When the process recognizes a problem then a red error message window will be displayed.

## 4.2.12 Clear Logs

### About clearing logs

Log files from the selected devices can be cleared.

### How to clear

1. Select one or multiple Base Unit devices.

Baseunit	Location	IP Address	Firmware	Health	Connection	Actions
ClickShare-				Fair	ONLINE	>
ClickShare-				Poor	OFFLINE	>
ClickShare-				Fair	ONLINE	>
ClickShare-				Fair	ONLINE	>
cs-ext-raodim				Poor	OFFLINE	>

Total 5

2 Baseunit(s) selected

Delete Baseunit(s) Download logs Clear logs Erase Settings Transfer Baseunit(s) :

Image 4-14

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. In the popup area, click on the settings icon with 3 dots.
- Extra options will appear, including the option to Clear the Base Unit logs.
3. Click on **Clear Logs**.
- A dialog box will be prompted, requiring confirmation to continue.
4. Click on **Clear Logs** to confirm.

#### 4.2.13 Retain Base Unit settings

##### About retaining settings

Retain settings and configurations of a Base Unit(s) that have not been connected to XMS Cloud for an extended period of time. This feature will keep the local settings of the Base Unit(s) when turning on and not be overwritten by XMS Cloud settings.



Retaining cannot be undone!

##### How to retain the settings

1. Select one or more devices (reference 1).

## Manage

Location	IP Address	Firmware	Health	Connection	Actions
ClickShare-			Fair	ONLINE	>
ClickShare-			Poor	OFFLINE	>
ClickShare-			Fair	ONLINE	>
ClickShare-			Fair	ONLINE	>
cs-ext-raodim			Poor	OFFLINE	>

Image 4–15

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. In the popup area, click on the settings icon with 3 dots (reference 2).  
Extra options will appear, including the option to retain the Base Unit settings.
3. Click on “Retain Base Unit settings” (reference 3).

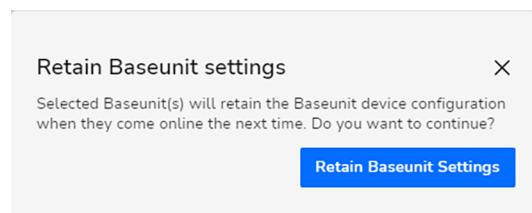


Image 4–16

A dialog box will be prompted, requiring confirmation to continue.

4. Click on the blue button “Retain Base Unit settings” to confirm.

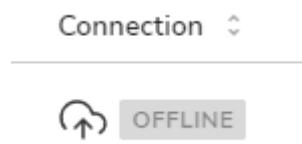


Image 4–17

The icon next to the “connection status” will be marked with the symbol for settings retention.

### 4.2.14 Reset to default

#### About reset

All selected Base Unit devices can be reset to the factory default settings, while keeping them in the current organization account.

#### How to reset to default

1. Select one or more Base Unit devices (reference 1).

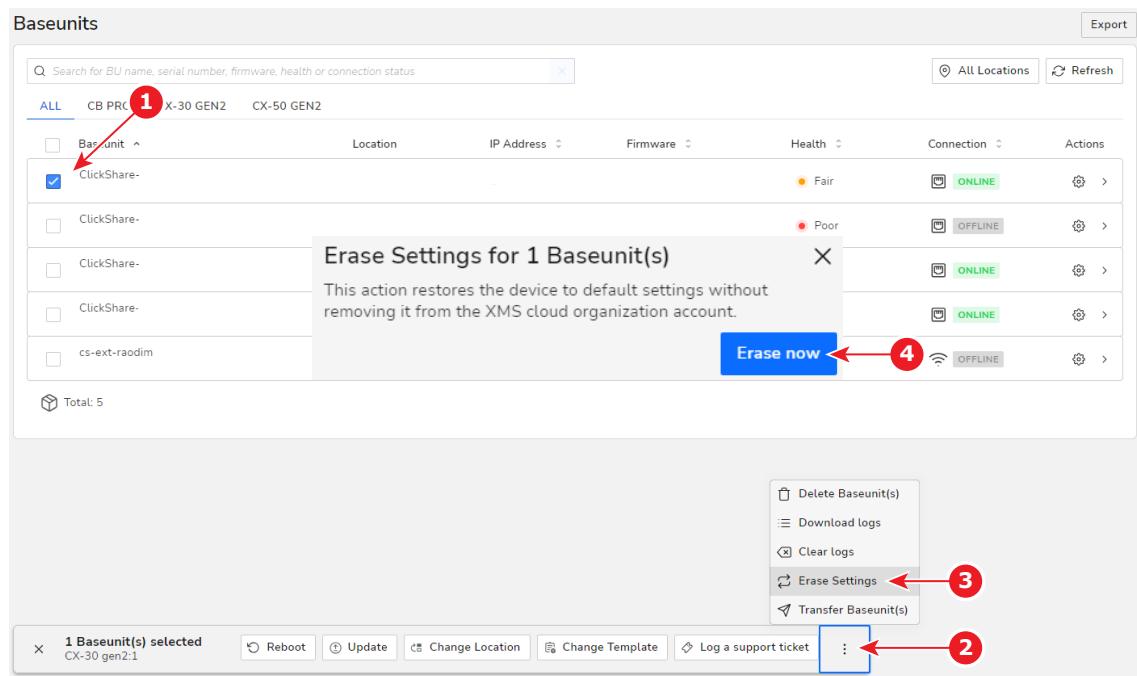


Image 4-18 Example of resetting a Base Unit device to is default factory settings

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. In the popup area, click on the settings icon with 3 dots (reference 2).

Extra options will appear, including the option to erase the Base Unit device settings

3. Click on **Erase Settings** (reference 3).

A dialog box will be prompted, requiring confirmation to continue.

4. Click on **Erase Now** to confirm (reference 4).

## 4.2.15 Transfer Base Units

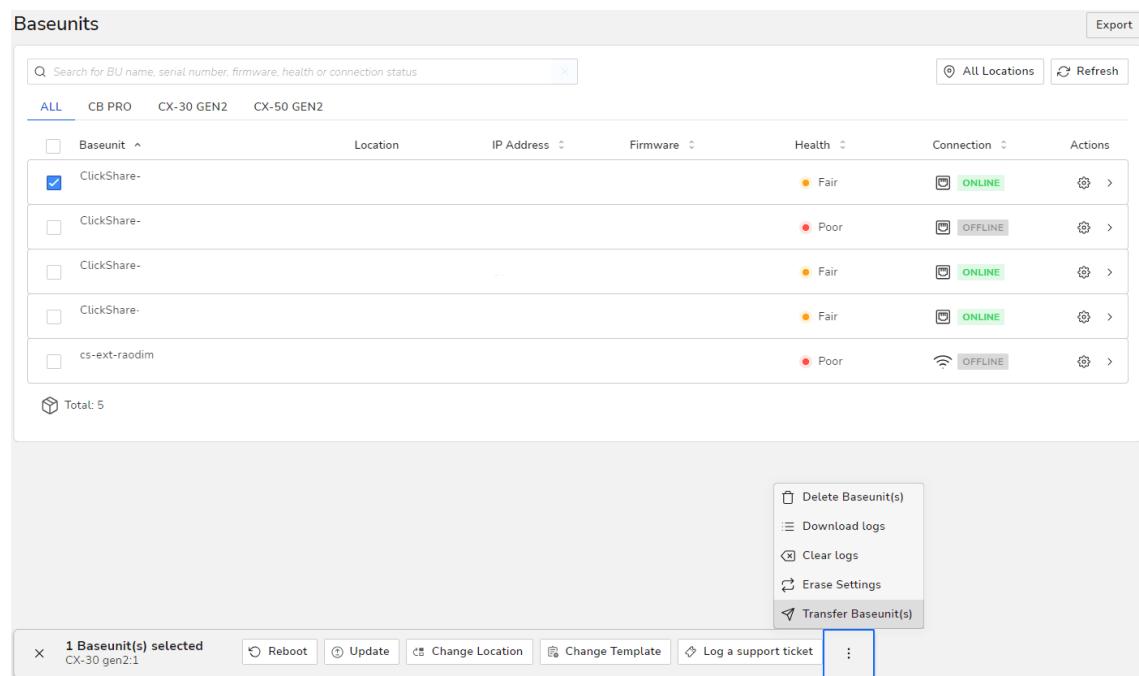
### About transfer

Base Unit devices from C-series and CX-series can be transferred from one organisation to another organisation.

### How to transfer

1. Select one or more Base Unit devices.

## Manage



Baseunit	Location	IP Address	Firmware	Health	Connection	Actions
ClickShare-				Fair	ONLINE	
ClickShare-				Poor	OFFLINE	
ClickShare-				Fair	ONLINE	
ClickShare-				Fair	ONLINE	
cs-ext-raodim				Poor	OFFLINE	

Image 4–19 Example of selecting a device to be transferred.

A popup will appear on the bottom, mentioning the number of Base Unit devices that are selected.

2. In the popup area, click on the settings icon with 3 dots.

Extra options will appear, including the option to Transfer the Base Unit devices.

3. Click **Transfer Base Units**.

The Transfer device dialog is prompted.

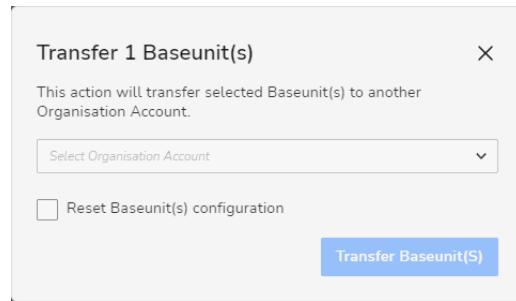


Image 4–20

4. Select the organisation from the drop down list where you want to transfer your selected Base Units.

 **Note:** Select the *Reset Device Configuration* check box to reset the selected devices during transfer. The factory reset operation is only available for Base Units with firmware version 2.12 or higher. This operation is applied after the device is online and connected to XMS Cloud.

5. Click **Transfer Base Units**.

A notification message will be displayed on the bottom of the page, confirming the transfer. This message will be displayed for about five seconds.

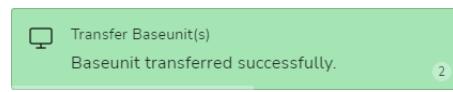


Image 4–21

You will now find the transferred device in the other organisation page.

## 4.3 Waiting

### 4.3.1 About waiting

#### Overview

Image 4–22 Example of the Base Units waiting for onboarding

<b>1</b> Total Base Units waiting to be onboarded <b>2</b> Serial number <b>3</b> Connection status	<b>4</b> Quick view <b>5</b> Export
---	--

All Base Units that have been onboarded with the QR code will automatically appear in the list giving an overview of the pending actions, extra details of the connected Base Unit and its current status. A quick summary of the amount of Base Units that are still waiting will be shown in the side bar. Information obtained during the QR onboarding can be exported.

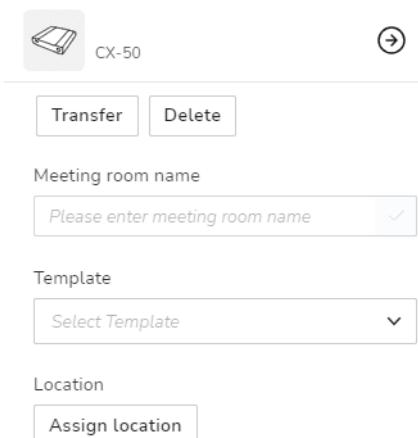
For more information of how to onboard a Base Unit with QR, refer to the installation manual of the device.

### 4.3.2 Actions

#### About actions

Clicking on the arrow icon in the “Action” tab will open a detail window containing:

- Transfer organisation.
- Delete Base Unit from XMS Cloud.
- Name the meeting room.
- Select a configuration template.
- Assign a location.
- Overview uncompleted steps



#### Let's connect to a network

You'll need an internet connection to manage your Baseunit on XMS Cloud. Once connected, you'll get the latest features and security updates.

 Internet connection  
Internet not available

 For Security  
Change Baseunit default password  
Connect to the Baseunit wifi and open Web configurator wizard by browsing to <http://192.168.2.1>  
Default SSID: ClickShare-  
Default Password: clickshare

Image 4-23

### 4.3.3 Export

#### About exporting

Exporting allows for the creation of “.csv” files containing information obtained during onboarding of the Base Unit(s). When exporting the data all currently waiting Base Unit(s) will be included.

#### How to export

1. Click on “Export”

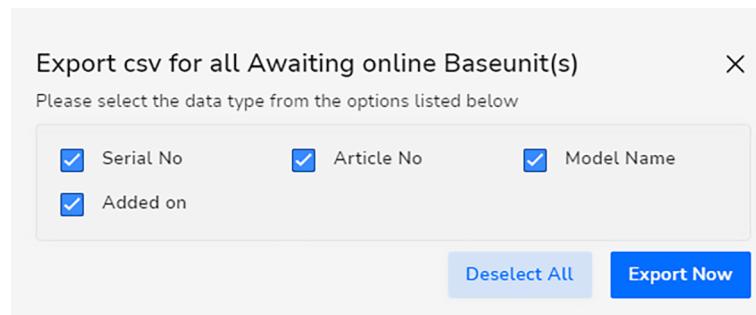


Image 4-24 Example of the information that can be exported

A pop-up of the possible information to be included in the export will be shown.

2. Select or deselect which information that must be included or omitted in the export.
3. Click “Export Now” to create and save the “.csv” file to a location of choice.

## 4.4 Clients

### 4.4.1 About Clients

#### Overview

Buttons are referred to as “Clients” within XMS Cloud!

Image 4–25 Example of the Clients page with all buttons

1	Button selection	6	Number of connections made with the Button
2	Serial number	7	Last used indicator
3	Base Unit the Button is paired with	8	Location tree
4	Meeting room location	9	Refresh button
5	Firmware version	10	Actions menu

### 4.4.2 History

#### How to get the history

1. Click on the desired Button to see its history.

Currently Paired With

ClickShare-test-2308 CX-50 gen2 • 1875502514
---

Connection History

ClickShare-test-2308 1875502514	15 Connections Paired 7 days ago
ClickShare-test-2308 1875502514	6 Connections Paired 22 days ago

Image 4–26

This history indicates:

- Time of last connection
- Information of the connected Base Unit (including model and serial number)
- Connection history

### 4.4.3 Export



This feature can only be used if at least one Button is paired to a Base Unit using the USB identification as unique per meeting room. For more information, see “Manage”, page 47 or the installation manual of the Base Unit.

## About export

Clicking “Export” will create an .xlsx containing the meeting room name and serial numbers of applicable Button(s). This file can be imported into an external management or logging portal. After importing, the exported Buttons will automatically be linked to the correct meeting room.

# 4.5 XMS Edge

## 4.5.1 About XMS Edge

### Overview

Image 4–27 Example of the XMS Edge window

1 XMS Edge name	6 Connection status
2 Search bar	7 +Add XMS Edge button
3 IP Address	8 Refresh button
4 Model type	9 Manage icon
5 Firmware version	

### About connection status

- Online/green: XMS Edge is connected
- Offline/grey: XMS Edge is disconnected

### About search bar

A search can be done per column or searching characters can be entered in the Search Edges field or in any column input field. When start typing the list will automatically be filtered.

### XMS Edge details

When you click on an XMS Edge, a details pane will be displayed on the right-hand side of the window.

Image 4–28 Example of the details pane for an XMS Edge

## 4.5.2 Manage



**CAUTION:** Be careful while editing your XMS Edge settings. If you change the network settings, it is possible that you cannot reach your XMS Edge anymore.

### How to manage your XMS Edge

1. While in the XMS Edge window, click on the Manage icon of the desired XMS Edge system.

The Manage XMS Edge window is displayed.

Image 4–29 Example of an XMS Edge manage window, Overview tab

On the Overview page, you can see the technical details of the XMS Edge, as well as the connected CS and CSE Base Unit devices.

2. Click *Configuration*.

The Configuration window is displayed.

Image 4–30 Example of the XMS Edge manage window, Configuration tab

3. Configure the XMS Edge as desired.
4. Once finished, click **Apply Changes** to confirm all changes.

### What settings can be managed?

The full configuration of the device can be filled in, reviewed and/or changed.. This is the following:

Menu	Pane	Explanation
Personalisation	XMS Edge	Enter a name that allows you to identify the XMS Edge device.
Network	LAN settings	<ul style="list-style-type: none"> <li>• LAN Hostname settings</li> </ul>

Menu	Pane	Explanation
		<ul style="list-style-type: none"> <li>Automatic (DHCP) or Manual (IP address, subnet Mask, gateway, DNS server)</li> </ul>
System	Date & Time	<ul style="list-style-type: none"> <li>Timezone</li> <li>NTP server enable slider (+ server location if enabled)</li> </ul>
Troubleshoot	Logging level	Select the desired logging level

### 4.5.3 Delete



Deleting an XMS Edge is only possible if no more Base Units are linked with that XMS Edge.

#### How to delete

1. Select the undesired XMS Edge.

The details pane will be displayed. If no Base Unit devices are linked with the XMS Edge, the Delete button will be available.

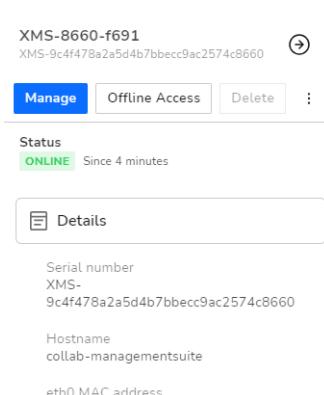


Image 4-31 Example of the details pane for an XMS Edge, here with the Delete button disabled

2. Click **Delete** and confirm.

### 4.5.4 Download logs

#### How to download logs

1. While in the XMS Edge window, click on the Manage icon of the desired XMS Edge system.

The manage XMS Edge window is displayed.

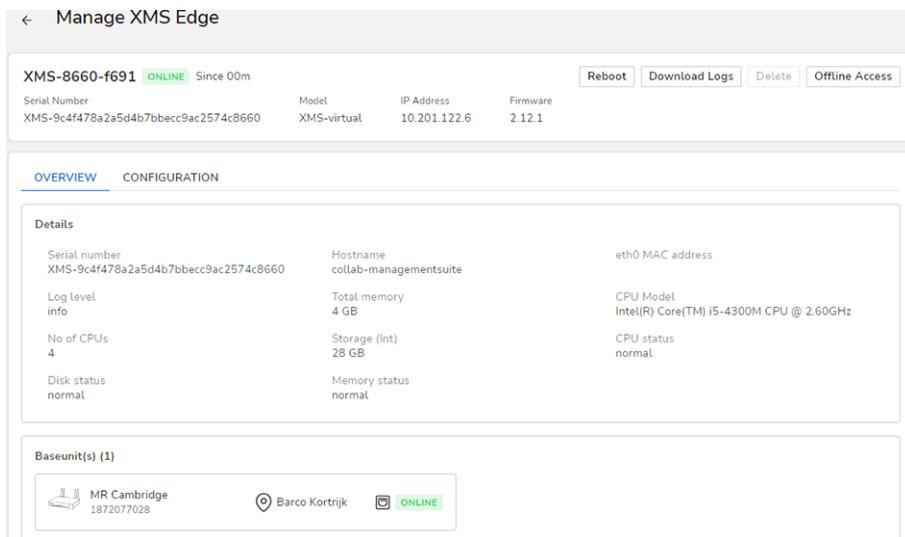


Image 4-32 Example of an XMS Edge manage window, Overview tab

## 2. Click Download Logs and confirm.

The downloads will start shortly.

A tar.gz file will be written to your downloads folder. This file is an encrypted file and can be used by service technicians to solve problems.

## 4.5.5 Reboot

### How to start a reboot

#### 1. While in the XMS Edge window, click on the Manage icon of the desired XMS Edge system.

The Manage XMS Edge window is displayed.

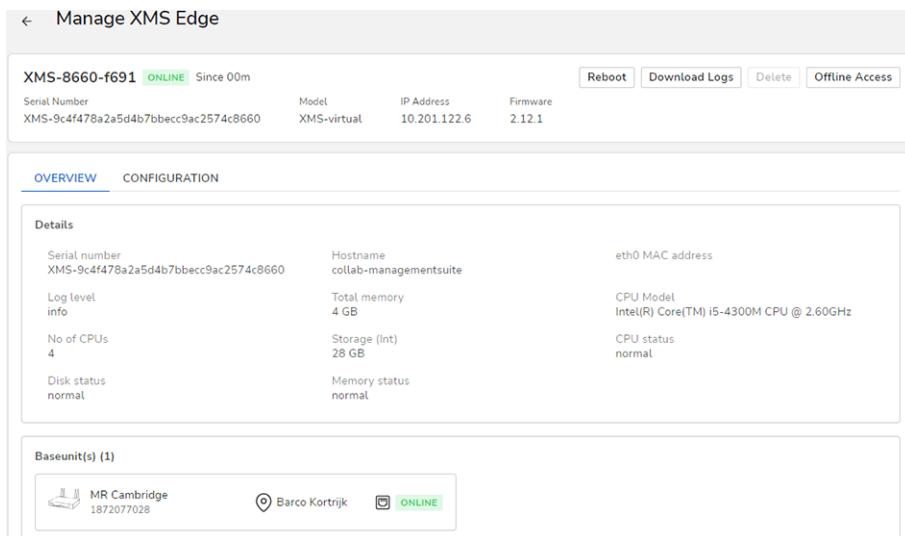


Image 4-33 Example of an XMS Edge manage window, Overview tab

## 2. Click Reboot and confirm.

The selected XMS Edge will reboot.

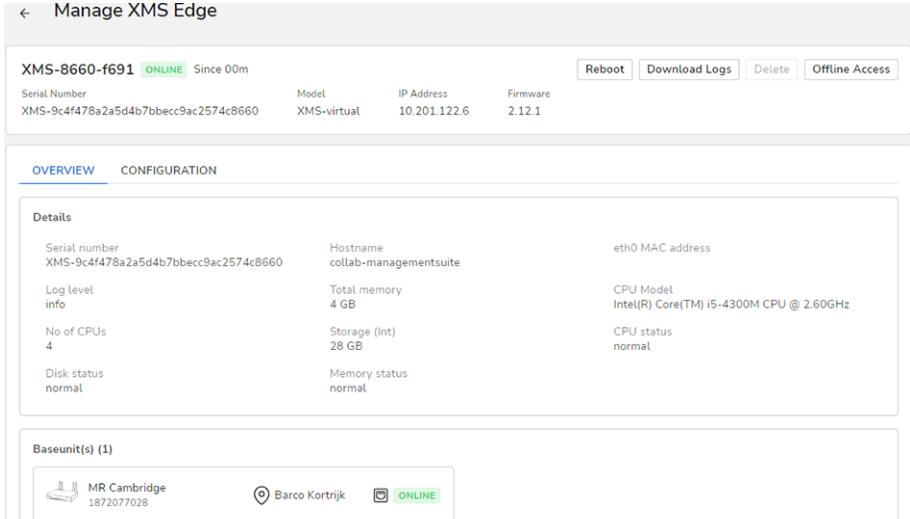
## 4.5.6 Offline access

### How to get offline access

#### 1. While in the XMS Edge window, click on the manage icon of the desired XMS Edge system.

The manage XMS Edge window is displayed.

## Manage



The screenshot shows the 'Manage XMS Edge' interface. At the top, there is a header with a back arrow, the title 'Manage XMS Edge', and a 'Logout' button. Below the header, a device summary card displays the device ID 'XMS-8660-f691' and its status 'ONLINE' (since 00m). The card also shows the serial number 'XMS-9c4f478a2a5d4b7bbecc9ac2574c8660', model 'XMS-virtual', IP address '10.201.122.6', and firmware '2.12.1'. To the right of the card are buttons for 'Reboot', 'Download Logs', 'Delete', and 'Offline Access'. The main content area is divided into two tabs: 'OVERVIEW' (selected) and 'CONFIGURATION'. The 'OVERVIEW' tab contains a 'Details' section with various system specifications and a 'Baseunit(s) (1)' section showing a list of connected base units, including 'MR Cambridge' and 'Barco Kortrijk', both marked as 'ONLINE'.

Image 4-34 Example of an XMS Edge manage window, Overview tab

### 2. Click Offline Access.

The Offline Access dialog is displayed, with the basic information in order to log in

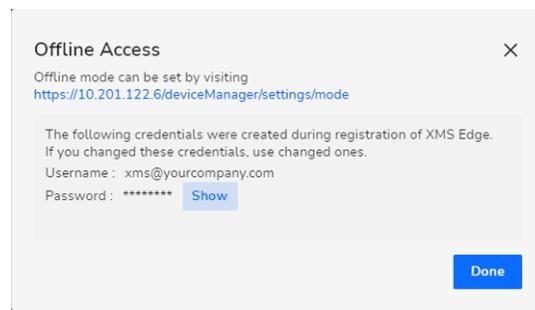


Image 4-35

### 3. Click Show to see the current password. At the same time that password is copied to your clipboard.

### 4. Click the link in the Offline Access window to start.

The login window opens.

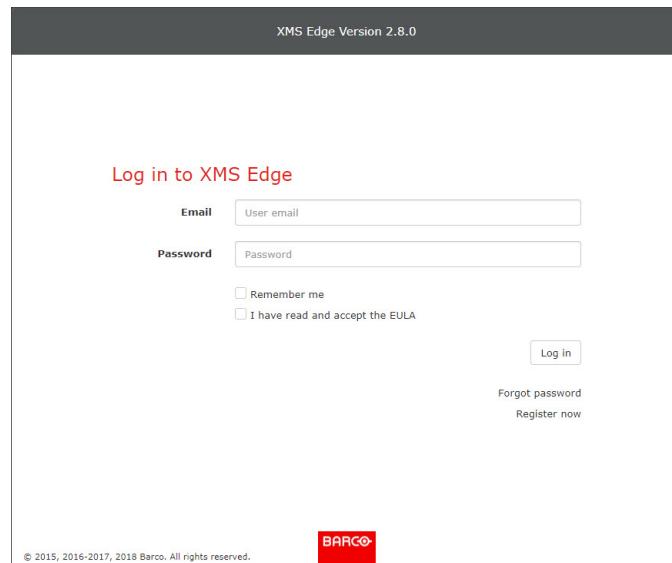


Image 4-36

### 5. Enter the access credentials to continue.

All settings from XMS Cloud will be available in XMS Edge.

# 4.6 Templates

## 4.6.1 About templates

### Overview

Image 4–37 Example of the Templates overview

1	Search template	4	Create new Template button
2	Add button, which includes Add Template	5	Template details icon
3	Manage template		

### Search template

To search for a template, enter a part of the name or description and the list will be filtered.

## 4.6.2 Edit and assign

### How to edit and assign

1. While in the Templates menu, click on the *Manage template* icon of the desired template.

The *Manage template* window is displayed.

Image 4–38 Example of the Manage template window

2. In the *Configuration* tab, edit all desired features this template should have.
3. Click on the *Assign Template* to assign the template to a (different) location.

The *Assign template* window is displayed.

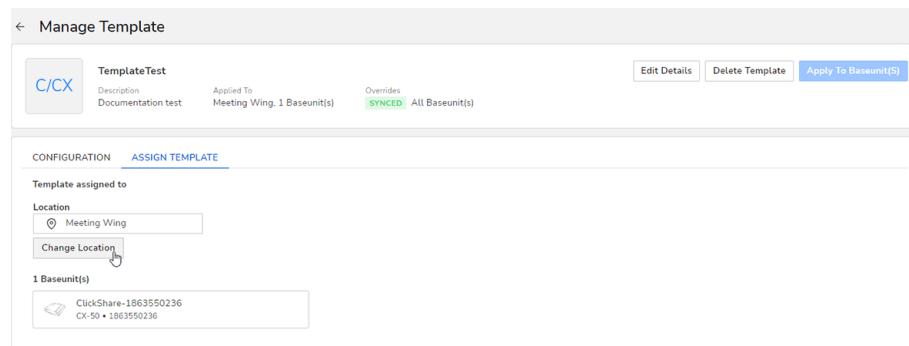


Image 4-39 Example of the Assign template window

4. To change the location the template will be assigned to, click **Change Location**.  
A location picker will be prompted.
5. Select the desired (new) location the template will be applied to.
6. Click **Assign Template & Close**.  
The newly picked location will be listed.
7. Once all desired details have been changed, click **Apply To Base Unit device(s)**.  
Click **Apply now** to confirm the made changes.  
The changes will be applied to the template.



Once saved, you will not automatically return to the Templates page. Click the ← icon to return to the Templates menu.

## 4.6.3 Delete

### How to delete

1. While in the Templates menu, select the undesired template (reference 1).

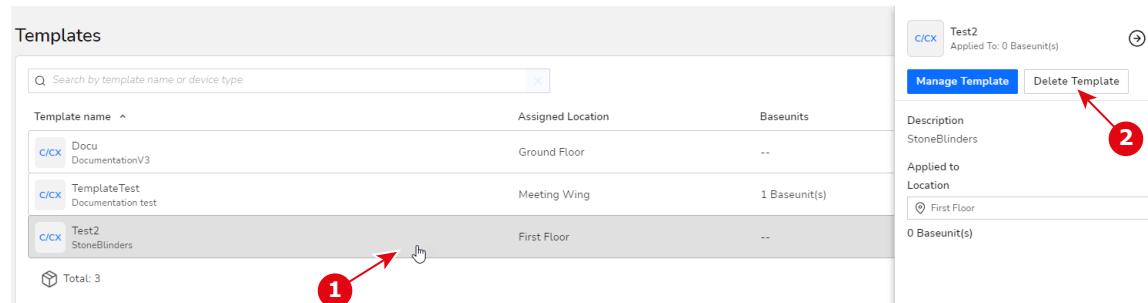


Image 4-40 Example of deleting a template.

The quick menu will appear on the right-side of the window.

2. Click **Delete Template** (reference 2).  
A dialog window will be prompted, asking for confirmation.
3. Click **Delete Template**.  
The template will be removed from the list.

## 4.6.4 Apply

### When to apply the template

While the created template is applied to all linked Base Unit devices upon the initial creation, every Base Unit device can be edited afterwards.

When a device has been edited, the quick menu of the Template will show the changed status with the tag "MODIFIED".

## How to apply

1. While in the Templates menu, select the Template to be reviewed.

The quick menu will appear on the right-side of the window. The quick menu will show if any of the linked Base Unit devices are modified.

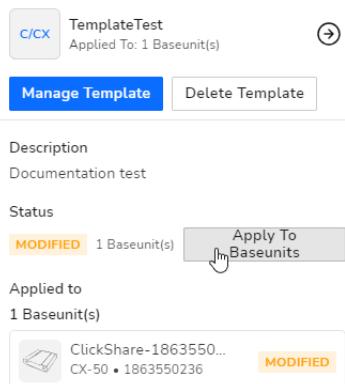


Image 4-41 Example of the Quick menu, with modified Base Unit device.

2. Click **Apply To Base Unit devices**.

The template is applied again to the modified Base Unit device. Any changes made that made it deviate from the template are now removed.

## 4.7 Location

### 4.7.1 About Location

#### Overview

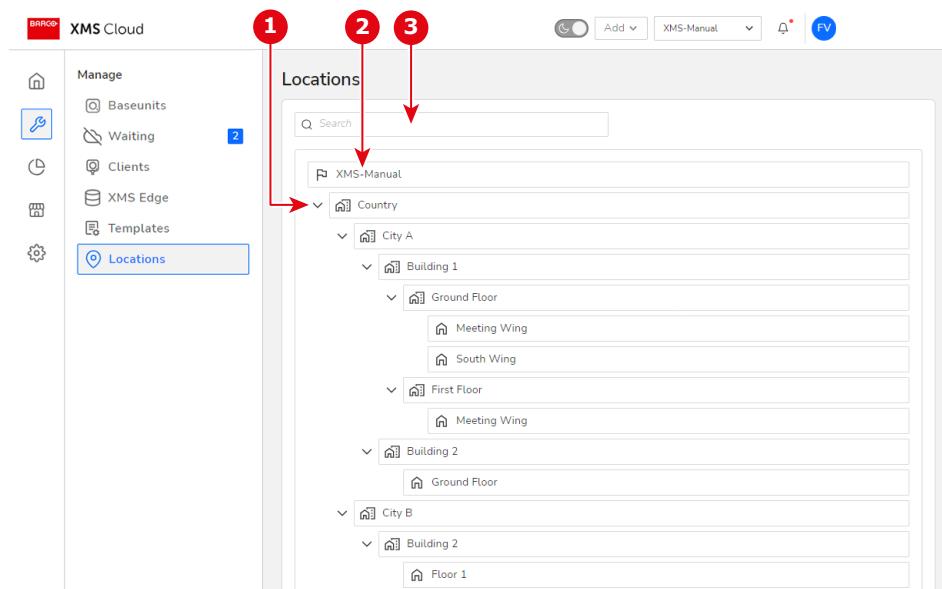


Image 4-42 Example of a location tree

- 1 Collapse – expand
- 2 Location tree overview
- 3 Search bar

## Search for a location

Start typing in the input field of Search location and the list will be filtered accordingly.

## Expand - Collapse tree

Click on the expand icon before a location to display the lower levels in that branch.

## 4.7.2 Add

### About adding a new location

A location can be a physical location or branch containing physical locations.

On any place in the tree a new location can be added. When it is a new branch, it can contain sub-branches and physical locations. To add a new branch or location, the same procedure is used.

### How to add

1. While in the Location tree menu, hover over the right-hand side of a branch or location.

The option icons (Add, Edit and Delete) will appear.



Image 4-43 The location tree with the option icons

2. Click on *Add child location*.

The *Add Location* window will be prompted.

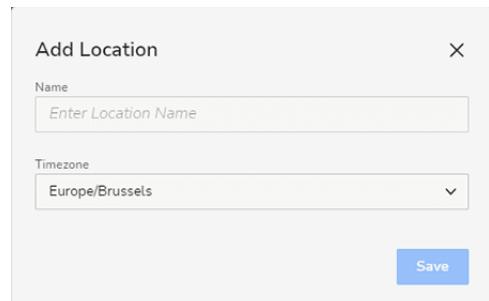


Image 4-44

3. Fill in the *Name* of the new location.
4. Use the drop down list below *Timezone* to select the appropriate time zone of the added location.
5. Click **Save**.

Your new location is added to the location tree.

## 4.7.3 Edit

### How to edit

1. While in the Location tree menu, hover over the right-hand side of a branch or location.

The option icons (Add, Edit and Delete) will appear.



Image 4-45 The location tree with the option icons

2. Click on the *Edit location* icon.

The *Edit Location* window will be prompted.

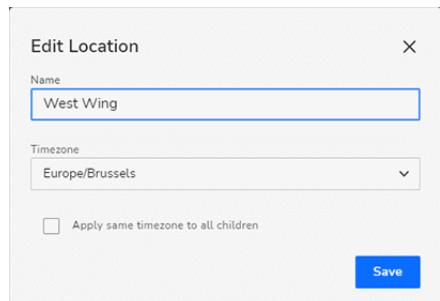


Image 4–46 Example of the Edit Location window.

3. Change the name and/or the timezone.
4. Click **Save**.

#### 4.7.4 Delete



You can delete any of the branches of the location. However, you cannot delete the top element in the location tree.

##### How to delete

1. While in the Location tree menu, hover over the right-hand side of a branch or location.

The option icons (Add, Edit and Delete) will appear.



Image 4–47 The location tree with the option icons

2. Click on the *Delete location* icon.
3. Click *Delete Location* to confirm that you want to delete the location and all of its children.



**Caution:** Be sure you have selected the right location to delete. Once confirmed, the location and all of its children will be removed from the location tree.  
Take into account that this action cannot be reversed.

## 4.8 Microsoft calendar



The calendar plugin must be active to see this menu. For more information, see ["Calendar integration", page 83](#).

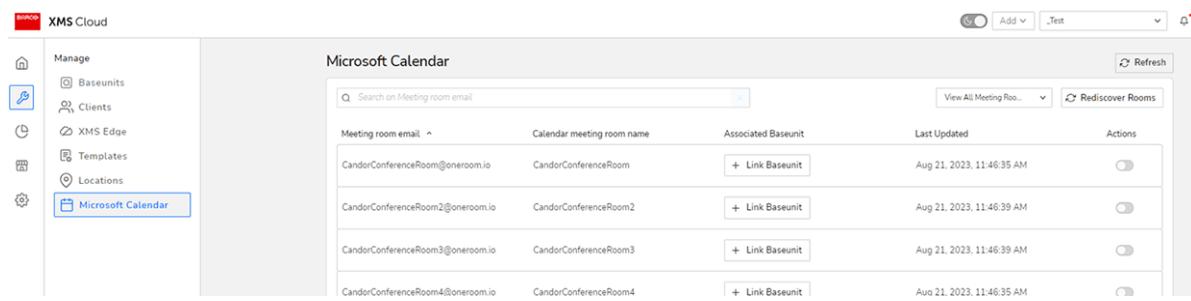
##### About microsoft calendar

Using microsoft calendar, each meeting room account can be linked to a Base Unit. This makes it easier to tell where a specific Base Unit is located.

##### How to assign a meeting room

1. Click on **+ Link Base Unit** in the row of the desired meeting room.

## Manage



Meeting room email	Calendar meeting room name	Associated Baseunit	Last Updated	Actions
CandorConferenceRoom@oneroom.io	CandorConferenceRoom	+ Link Baseunit	Aug 21, 2023, 11:46:35 AM	<input type="checkbox"/>
CandorConferenceRoom2@oneroom.io	CandorConferenceRoom2	+ Link Baseunit	Aug 21, 2023, 11:46:39 AM	<input type="checkbox"/>
CandorConferenceRoom3@oneroom.io	CandorConferenceRoom3	+ Link Baseunit	Aug 21, 2023, 11:46:39 AM	<input type="checkbox"/>
CandorConferenceRoom4@oneroom.io	CandorConferenceRoom4	+ Link Baseunit	Aug 21, 2023, 11:46:35 AM	<input type="checkbox"/>

Image 4–48 Example of the Manage Calendar window.

2. Select the desired Base Unit device that must be linked with the meeting room.

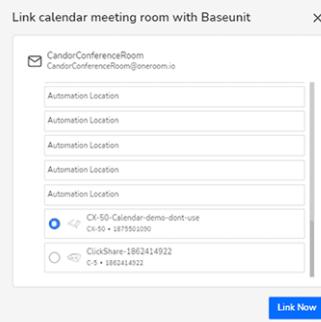
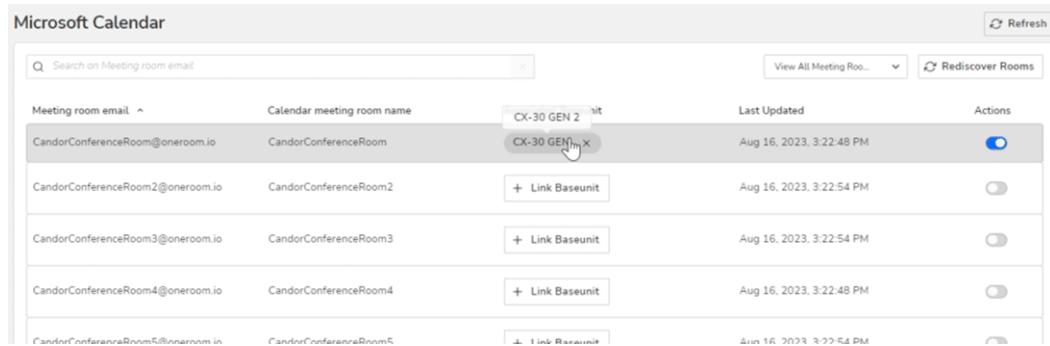


Image 4–49 Example of the Base Unit selector window.

3. Click **Link Now**.

The Base Unit device is now linked with the chosen meeting room.



Meeting room email	Calendar meeting room name	Associated Baseunit	Last Updated	Actions
CandorConferenceRoom@oneroom.io	CandorConferenceRoom	CX-30 GEN 2	Aug 16, 2023, 3:22:48 PM	<input type="checkbox"/>
CandorConferenceRoom2@oneroom.io	CandorConferenceRoom2	+ Link Baseunit	Aug 16, 2023, 3:22:54 PM	<input type="checkbox"/>
CandorConferenceRoom3@oneroom.io	CandorConferenceRoom3	+ Link Baseunit	Aug 16, 2023, 3:22:54 PM	<input type="checkbox"/>
CandorConferenceRoom4@oneroom.io	CandorConferenceRoom4	+ Link Baseunit	Aug 16, 2023, 3:22:48 PM	<input type="checkbox"/>

Image 4–50 Example of the meeting room linked with a Base Unit device

4. Repeat this procedure for every meeting room with a Base Unit.

# 5

## Analyze

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## 5.1 About analyze

### Overview

The analyze page allows for organised access to data related to the selected organisation. It is subdivided in 2 categories:

- Usage insights
- Audit logs

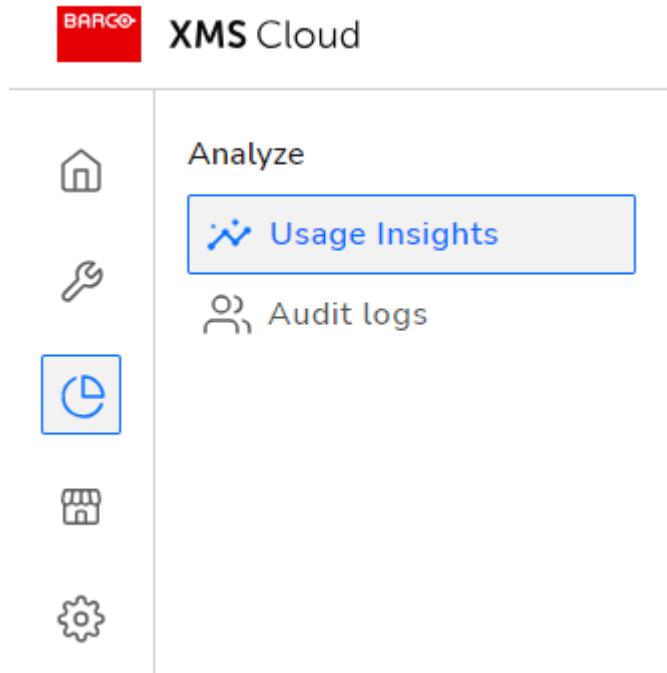


Image 5-1

## 5.2 Usage insights

### 5.2.1 About Usage insights

#### Overview

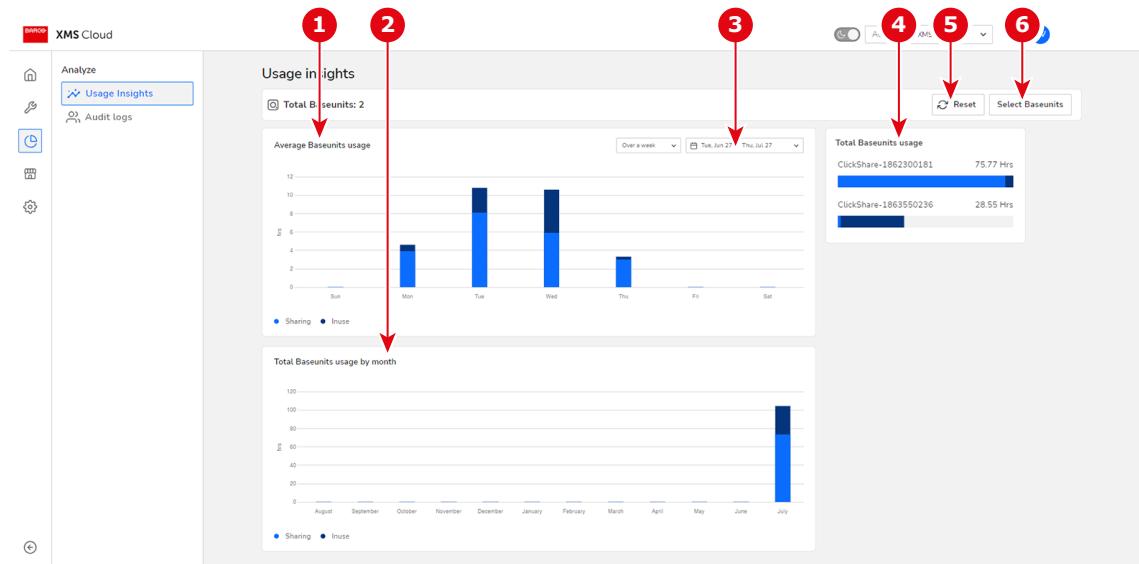


Image 5-2 Example of the Usage insights page

- 1 Average usage in hours – daily distribution
- 2 Total usage by month in hours
- 3 Date range selector

- 4 Total usage per Base Unit device in hours
- 5 Reset current view button
- 6 Base Unit device and meeting room selector

## 5.2.2 Date range selection

### About date range

The date range for the statistics can be set.

### How to set

1. Click inside the date range field.

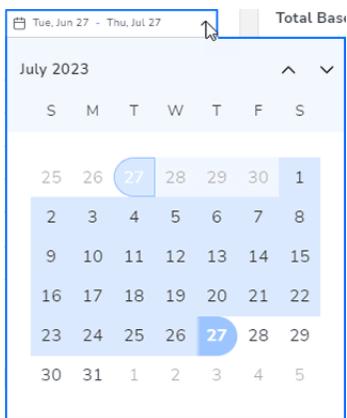


Image 5-3

A date selector calendar is displayed.

2. Browse first to the desired month with the left or right arrows on top. Then click on the start day.  
The start day is filled out.
3. If necessary, browse to the desired month and click on a day. This will be the end day.  
The statistics will be updated accordingly.

## 5.2.3 Select Base Units

### How to select

1. Click on Select Base Unit units.

The Meeting room and Base Unit selector will be displayed.

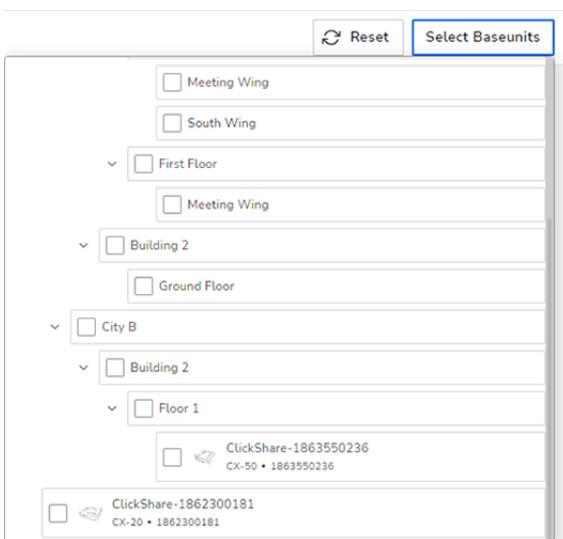


Image 5-4

## 2. Select the desired meeting room or Base Unit.

The statistics will be updated accordingly.

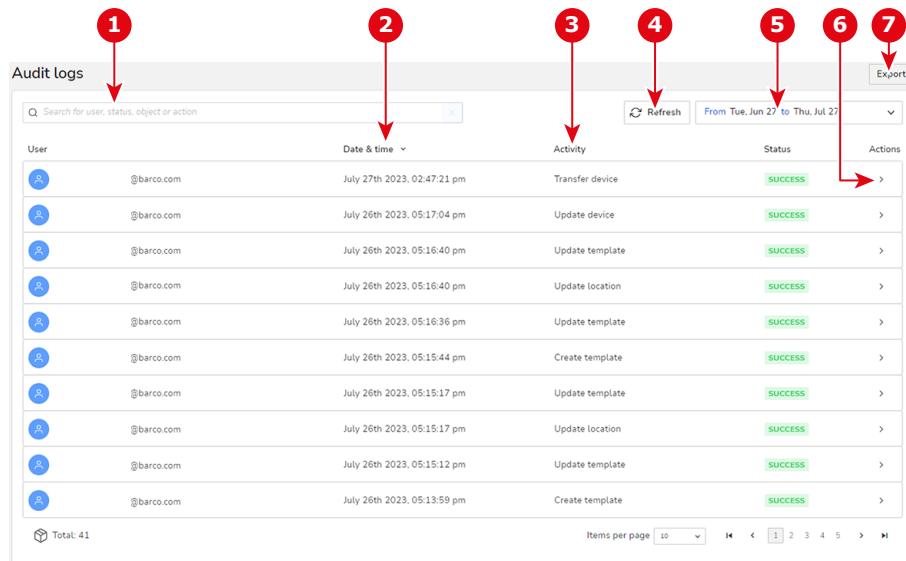
### 5.2.4 Reset

#### About reset

Resets the view to include all default data for the Base Units.

## 5.3 Audit logs

#### Overview



The screenshot shows a table titled 'Audit logs' with the following columns: User, Date & time, Activity, Status, and Actions. There are 10 entries in the table, each showing a user (@barco.com), a timestamp (e.g., July 27th 2023, 02:47:21 pm), an activity (e.g., Transfer device, Update device, Update template, Update location, Create template), a status (all SUCCESS), and an 'Actions' column with a details button. The table includes a search bar, date selector, and export button. Callouts numbered 1 through 7 point to these elements: 1. Search bar, 2. Date & time of the action, 3. Logged activity, 4. Refresh button, 5. Date selector, 6. Details button, and 7. Export logs (as .csv file).

User	Date & time	Activity	Status	Actions
@barco.com	July 27th 2023, 02:47:21 pm	Transfer device	SUCCESS	>
@barco.com	July 26th 2023, 05:17:04 pm	Update device	SUCCESS	>
@barco.com	July 26th 2023, 05:16:40 pm	Update template	SUCCESS	>
@barco.com	July 26th 2023, 05:16:40 pm	Update location	SUCCESS	>
@barco.com	July 26th 2023, 05:16:36 pm	Update template	SUCCESS	>
@barco.com	July 26th 2023, 05:15:44 pm	Create template	SUCCESS	>
@barco.com	July 26th 2023, 05:15:17 pm	Update template	SUCCESS	>
@barco.com	July 26th 2023, 05:15:17 pm	Update location	SUCCESS	>
@barco.com	July 26th 2023, 05:15:12 pm	Update template	SUCCESS	>
@barco.com	July 26th 2023, 05:13:59 pm	Create template	SUCCESS	>

Image 5–5 Example of the Audit logs

1	Search bar	5	Date selector
2	Date & time of the action	6	Details button
3	Logged activity	7	Export logs (as .csv file)
4	Refresh button		

Every action that happens in the system is logged with a time stamp, a user name, type of actions, the object on which the action take place and status of the action.

#### Export audit logs

If you want the full details of the current organistaion, click on the **Export** button and confirm with **Export now**.

If you want the details of a single activity, click on the desired activity (making the quick menu appear on the right-side of the window. click on the **Export** button and confirm with **Export now**.

In both cases, the log files will be downloaded as a .csv file.

# 6

## Marketplace

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## 6.1 About marketplace

### Overview

The XMS Cloud marketplace contains a list of helpful tools, Integrations, plug-ins, etc.

Added tools, Integrations, plug-ins, etc. will be listed under the 4 Explore subdivisions.

The marketplace exploration subdivisions are:

- All categories
- Digital Signage
- Calendar
- Service

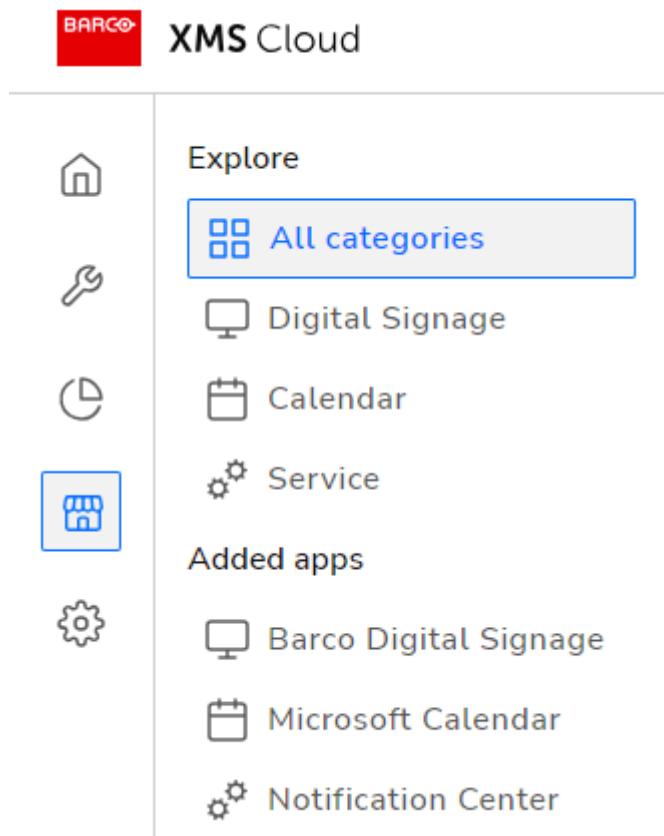


Image 6-1 Example of the XMS Cloud marketplace with its added apps

## 6.2 Adding and removing

### 6.2.1 Add a plug-in

1. Navigate to the details page of the desired plug-in.

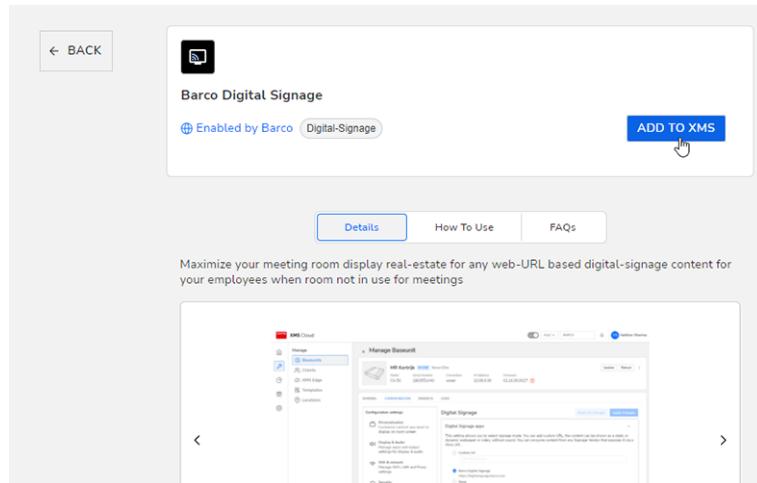


Image 6–2 Example of a detail page for a plug-in, this being Barco Digital Signage

**2.** Click on **Add to XMS**.

The plug-in feature is now added to the current organisation.

## 6.2.2 Remove a plug-in

### How to remove

1. Navigate to the details page of the desired plug-in.
2. Click on **Remove from XMS**.

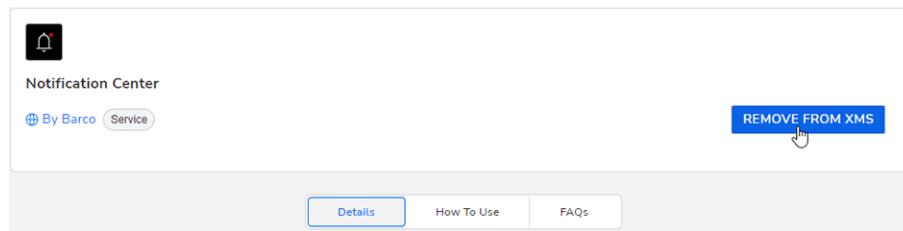


Image 6–3 Example of removing a plug-in from XMS

The plug-in is now removed.

Any integration with external services (e.g. Microsoft Azure with the Calendar plug-in), will be automatically broken when the plug-in is removed.

### What to do after removing the calendar by accident

If one of the users has accidentally revoked the Calendar plug-in, there will be a warning visible in the Manage Microsoft Calendar, after pressing **Rediscover Rooms**.

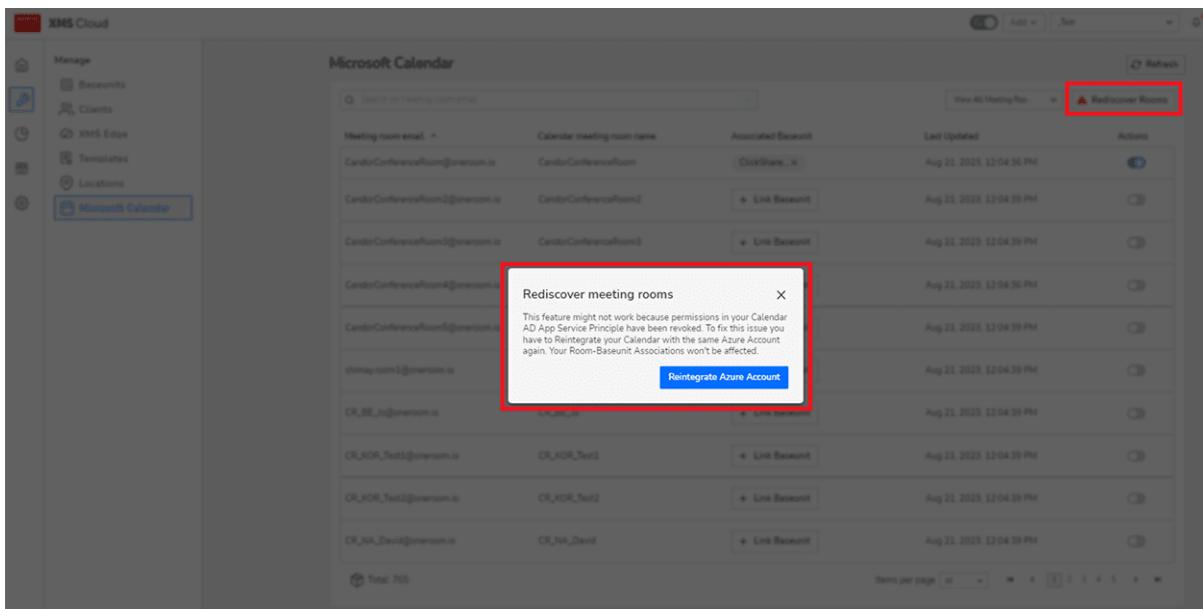


Image 6–4 Example of the warning

Follow the on-screen instructions to help reintegrate the whole calendar again. Once reintegrated, you will be able to start the calendar integration again.

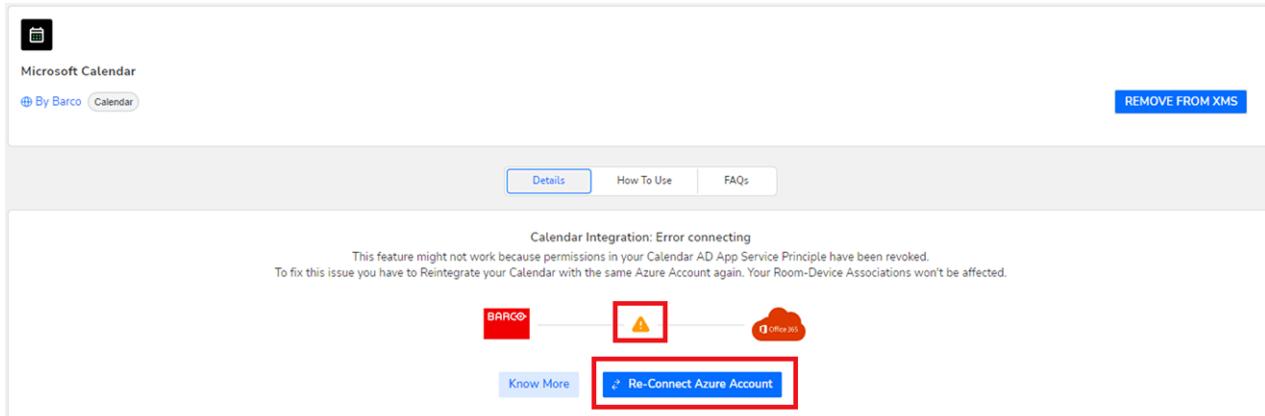


Image 6–5 Pressing Re-Connect Azure Account will help you to re-establish a connection with your Azure Account

## 6.3 Explore

### 6.3.1 All categories

#### Overview

You can use the search bar on top of the window to find a desired plug-in feature.

Non-installed plug-in features will have the button **View details**. Installed features will have the **Manage** button instead.

Click on **View details** to see the details of a plug-in.

Click on **Manage** to go to the configuration page of installed plug-in features.

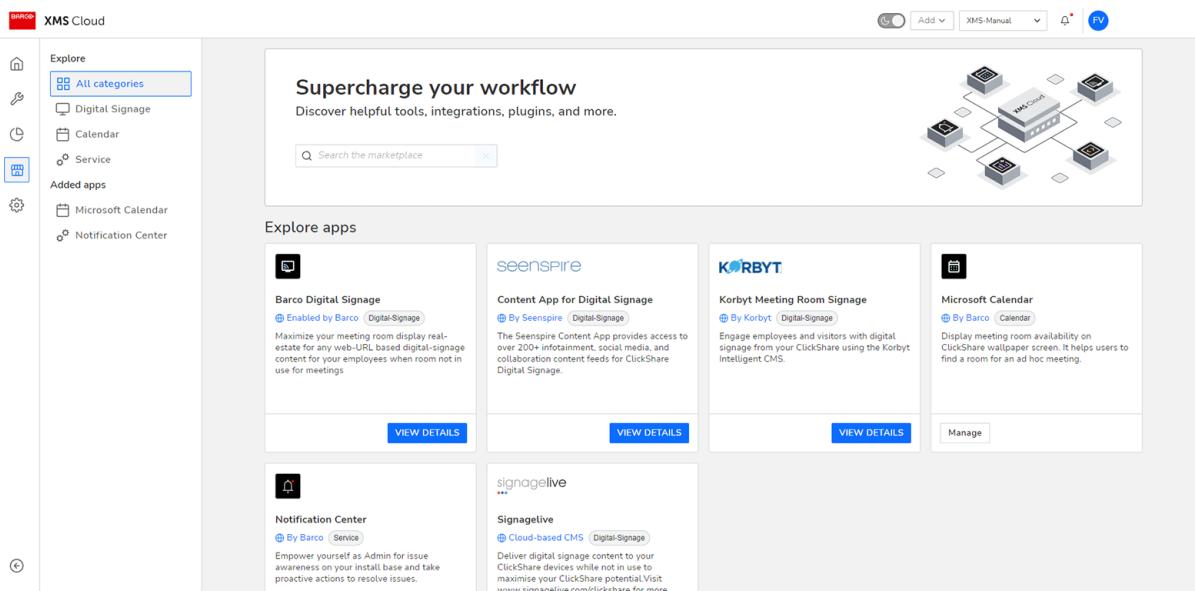


Image 6–6 Example of the marketplace overview



By default, the Notification center and Calendar plug-in features are added to your space. These can be removed.

## 6.3.2 Digital signage

### About digital signage

Digital signage allows you to bring content to a meeting room with the ClickShare Base Unit, while nobody is using it to share their meetings or presentations. The content can be shown as static or dynamic wallpaper or video, without sound. You can consume content from any Signage Vendor that exposes it via a Web URL. You can also display company news, tips and tricks or other internal information, from a URL in your company network.

### Guidelines and limitations

There are a few limitations and guidelines concerning proper usage. These are the following:

- ClickShare Base Unit must run software 2.16 or newer
- The feature cannot run on CS or CSE units
- The feature can run on C-5, C-10, CX-20, CX-30 in the following limited capacity
  - Use mostly static pages
  - Limit transition effects
  - Limit the playlist
  - If more complex content is desired, test it thoroughly before deploying it on all units.
- On CX-50 (both Gen 1 and Gen 2) more complex and dynamic content is allowed, with more transition effects.



It is always recommended to thoroughly test the content during an extended period before deploying it to operational systems.

For more detailed technical specifications and limitations concerning the content, as well as a list of known technical issues, please consult the Barco support web page for Digital Signage.

### About monitoring system health

The ClickShare software now also includes a mechanism to monitor the internal memory used by the signage application. To keep the system healthy for presentation and conferencing, it will restart the Signage application when the application uses too much memory (e.g. when complex content is used, or when the content web application doesn't properly clear memory).

## About usage with multiple screens

When multiple screens are connected to the Base Unit device, Digital Signage will only be shown on the primary display (display 1).

## How to enable the digital signage

1. In XMS Cloud, navigate to the Marketplace >> Digital Signage.
2. Choose the desired Digital signage plug-in by clicking on the View Details button.

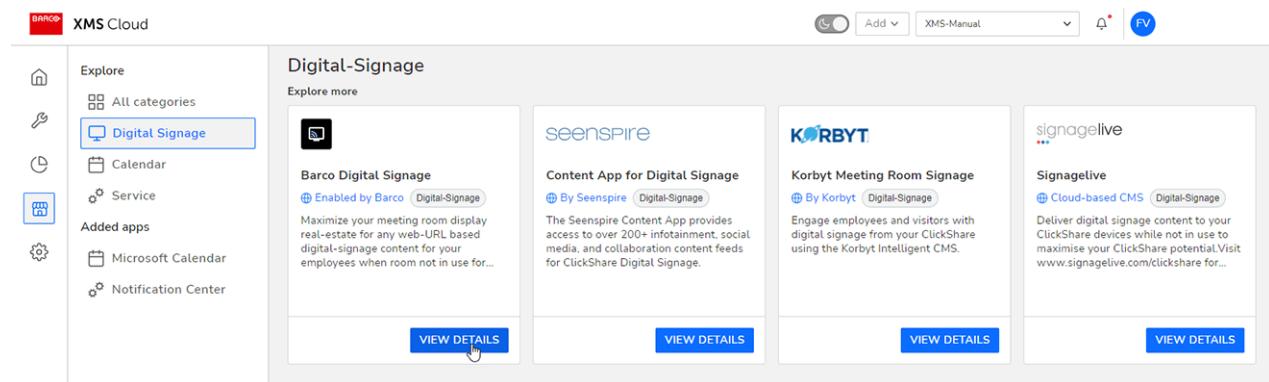


Image 6–7



**Note:** Barco provides several options for Digital Signage in its marketplace. This procedure will use the Barco-provided plug-in *Barco Digital Signage*. The workflow for the other plug-ins will work in a similar way.

3. In the chosen plug-in, click **Add to XMS**.

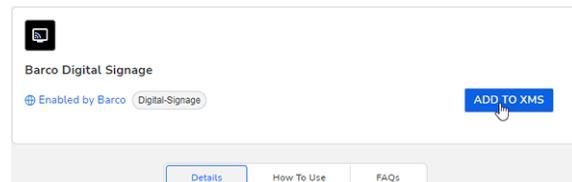


Image 6–8 Example of a Digital Signage plug-in

The Digital Signage page of the chosen plug-in will be added to the Marketplace menu.

Similarly the Digital Signage page will be added to the *Manage Base Unit* window, on the *Configuration* tab.

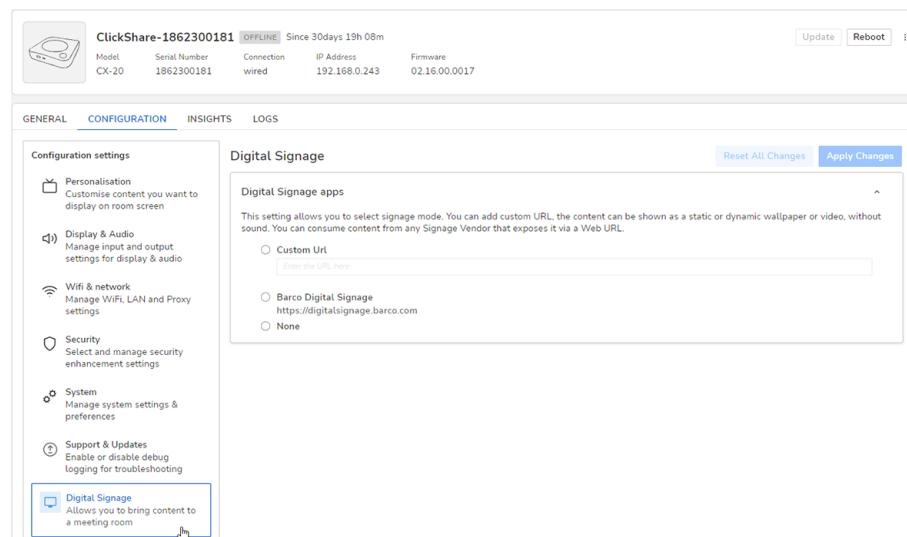


Image 6–9 Example of the Digital Signage window on the Manage Base Unit window

4. On the Digital Signage page, you can choose the desired Digital Signage method:

- The Digital Signage method provided by the developer of the app (e.g. Barco Digital Signage in the Barco Digital Signage plug-in).
- A custom Digital Signage, via a provided URL.
- None

### 6.3.3 Calendar integration

#### About Calendar

The calendar capability allows to display your room calendar on the monitor connected with ClickShare device.

#### Secure Azure AD integration

XMS Cloud can be used to display the availability of the meeting room on the screen using ClickShare (optional feature). This is done securely using Azure Enterprise Applications that integrate with Azure AD. To mitigate security risks that might arise while integrating Azure Enterprise Applications in Azure AD, this feature makes use of 2 separate Azure Enterprise Applications, the 'ClickShare Meeting Room Discovery' and the 'ClickShare Calendar Sync'. The 'ClickShare Meeting Room Discovery' is a multi-organisation application while the 'ClickShare Calendar Sync' is a single organisation application, only hosted in the customer's Azure AD. The ClickShare Base Units access the calendars only through the single organisation 'ClickShare Calendar Sync' using a per customer unique and random client secret. The client secret is created by Microsoft with the following properties: randomly generated and expires automatically after 24 months.

For more in-depth information, see Barco's Security white paper "XMS Cloud and (Virtual) Edge Security Whitepaper" which can be downloaded from Barco's website.



Verify the publisher (Barco) of the Enterprise Application before adding it to your organisation.



Limit the access of the Enterprise Application 'ClickShare Calendar Sync' to only the needed meeting rooms (and no other calendars) using an ApplicationAccessPolicy on Microsoft Exchange Online.

#### Role of the IT administrator in this process

To enable the device to get the calendar, XMS Cloud needs to be "connected" to your Microsoft Azure Account. This 'connection' makes it possible to discover your rooms and share their credentials with the devices. Approval from your organization's O365 administrators is required.

1. Before starting the integration, contact an IT administrator who has a **Global Administrator role in Azure Active Directory**. Only this type of account can enable the integration.
2. Add the credentials of the IT administrator to the XMS organisation you want to add the calendar.
3. Ask the IT administrator to sign in to XMS Cloud and browse to the Calendar page and ask him to execute the next *How to setup*.
4. After the How to setup, the customer or the integrator can continue with the procedure *Assign a meeting room to a calendar*.

#### Before starting

By default, the Microsoft Calendar plug-in is installed in your current organisation. If not (or if removed manually), proceed as follows to bring it back:

1. In XMS Cloud, navigate to *Marketplace >> Calendar* and click **View Details**.
2. In the detail window, click **Add to XMS**.

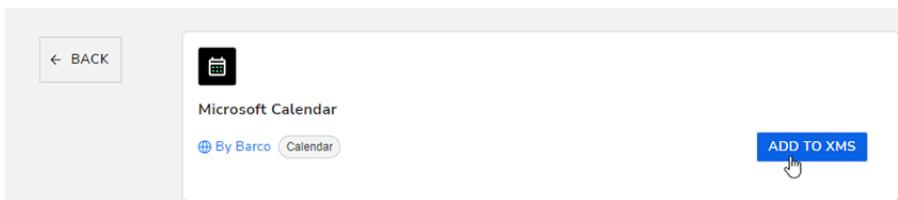


Image 6-10

### How to setup the calendar

The following actions are to be performed by the IT administrator with a global Administrator role in Azure Active Directory.

1. Navigate to *Marketplace >> Microsoft Calendar*.
2. Click **Connect Azure Account**.

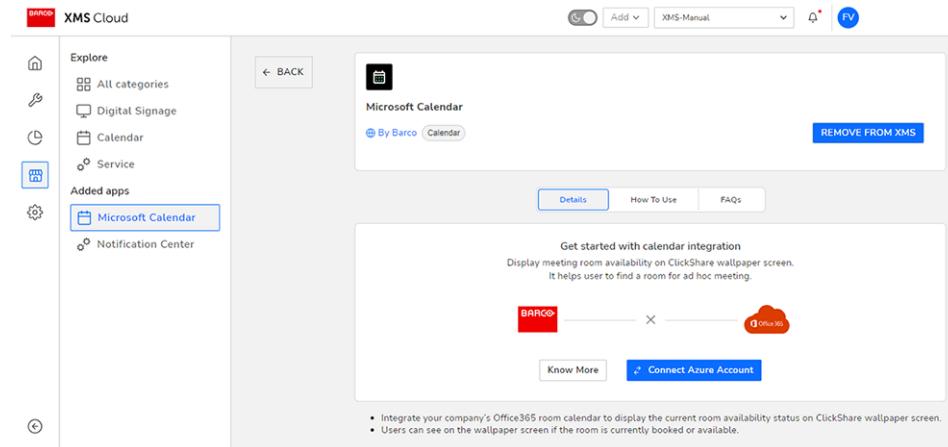


Image 6–11

3. Sign in using the administrator credentials.

An approval screen for ClickShare Meeting Room Discovery will be shown.

4. Read the message on the screen and click **Accept**.

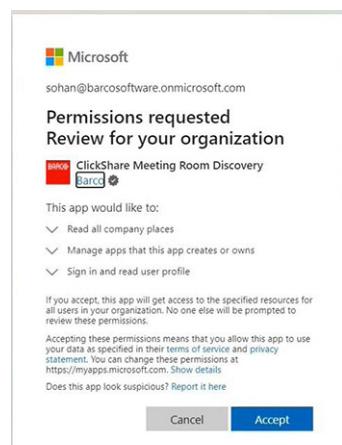


Image 6–12

A redirection to XMS Cloud will occur.

5. Wait until the validation has completed.



*Tip:* This process can take up to 30 minutes.

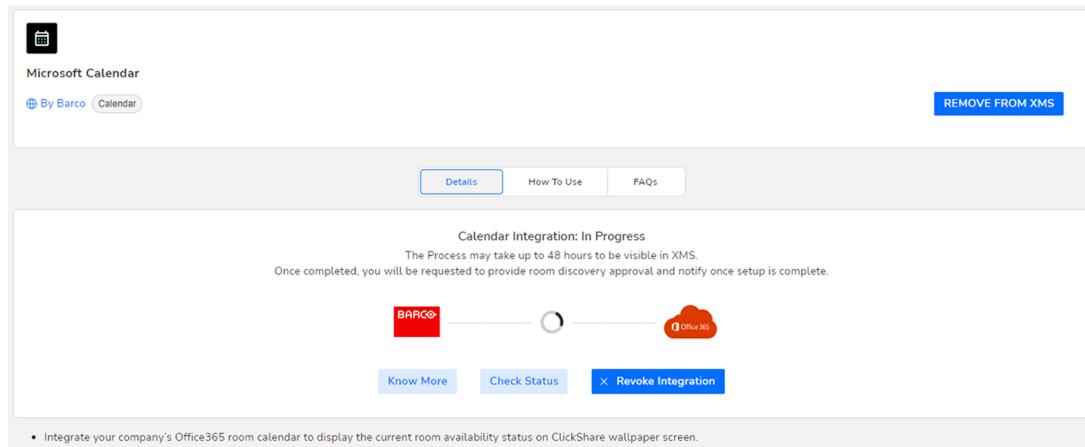


Image 6–13

The page will refresh.

**6.** Click on **Continue integration** to grant read permissions to XMS Cloud.

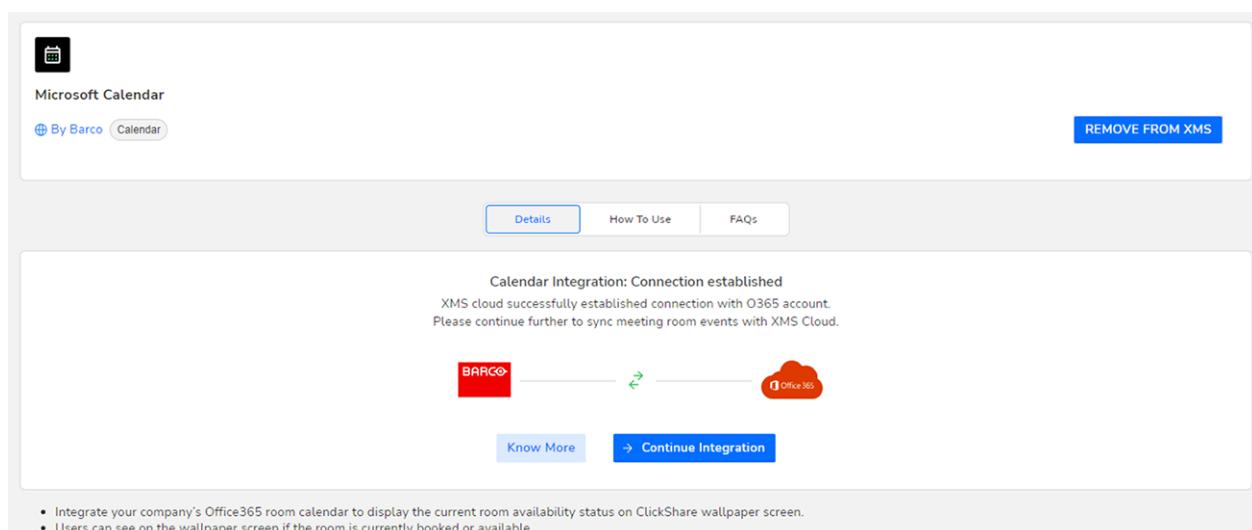


Image 6–14

**7.** Read the message on the screen and click **Accept**.

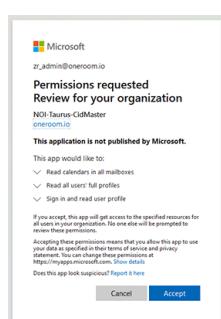


Image 6–15

The integration process has been completed.

**8.** Click on “Manage calendar” to configure the calendar integration. For more information, see “[Microsoft calendar](#)”, page 71.

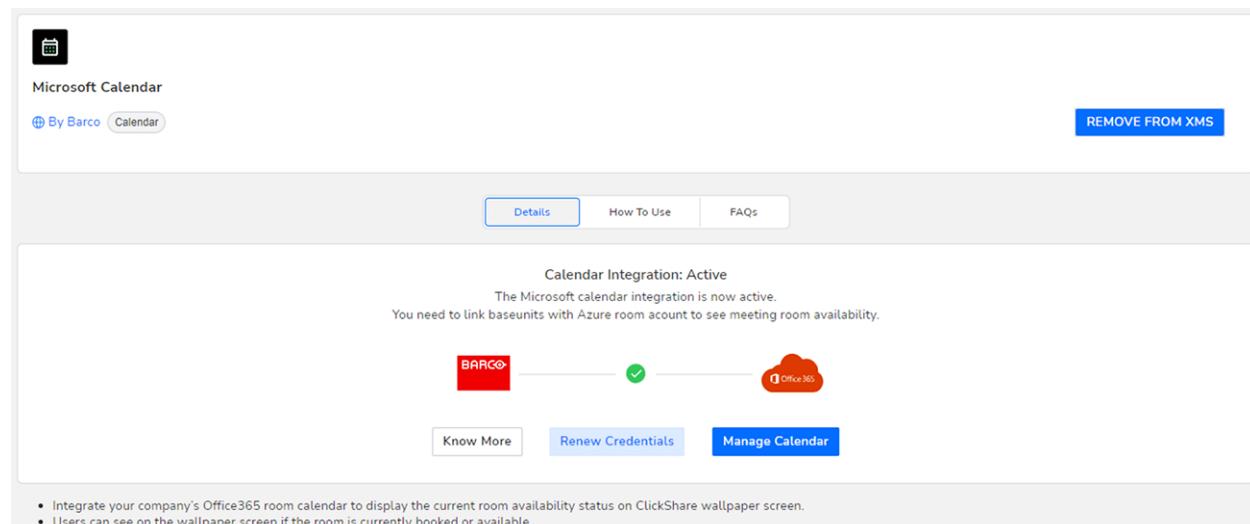


Image 6–16

### 6.3.4 Service

#### About the Notification Center

One of the plug-ins that can be installed is the Notification Center. While this is installed by default, this can be removed if deemed unnecessary.

For more information on what the notifications do, see [“Notification hub”, page 30](#).

## 6.4 Added apps

#### About added apps

All plug-ins that have been added to XMS Cloud will be listed here.

Clicking on an installed plug-in takes you to the overview page of said plug-in. Allowing you to manage or check the plug-in.

Removing a plug-in will also remove it from the list under “Added apps”.

# 7

## Settings

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## 7.1 About settings

### Overview

Customise, manage and change the way XMS Cloud works or displays information for all organisations.

The settings subdivisions are:

- User management
  - Users
  - Roles & permissions
- Events configuration
- Firmware settings

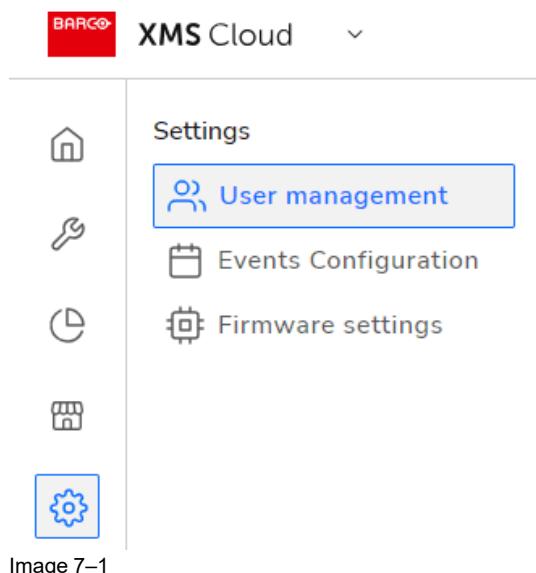


Image 7-1

## 7.2 User management

### About user management

User management is further subdivided into users and role management.

### 7.2.1 Users

#### Overview

User	Role	Location access	Actions
@barco.com	Admin	All locations	<a href="#">Actions</a>
@barco.com	Admin	All locations	<a href="#">Actions</a>
@barco.com	Admin	All locations	<a href="#">Actions</a>
@barco.com	Admin	All locations	<a href="#">Actions</a>

Total: 4

Image 7-2 Example of the User management page

- 1 Search bar
- 2 User selection
- 3 User role

- 4 User Location access level
- 5 Settings icon
- 6 Add new user and corresponding role

### 7.2.1.1 Search

#### Search user

Start by typing a part of the user name in the Search user field and the list will be filter accordingly.

### 7.2.1.2 Add user

#### How to add

1. In the User management window, click **+ Invite User**.

The Invite new user window is prompted.

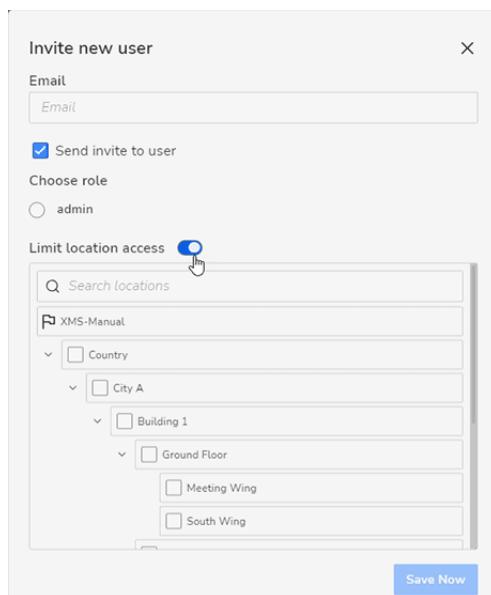


Image 7-3 Example of the Invite new user window, with limit location access enabled.

2. Enter the e-mail address of the user in the *Email* field.
3. Select whether or not you want to send an invitational mail to the user.



**Note:** This option is enabled by default.

4. Choose the role of the newly added user. Select the default role, or one of the custom made roles. For more information on this, see "[Add new role](#)", [page 91](#).
5. If desired, you enable the Limit location access slider.

When enabled, the location picker will be displayed in the window.

6. If enabled, you can pick the location(s) the new user will have access rights to.
7. Click **Save Now** to add the new user to the list of users.

If *Send invite to user* was enabled, the user will now receive an invitational mail with an access link to XMS cloud.

### 7.2.1.3 Manage user

#### How to edit

1. While in the User management window, click on the desired user to change.

The details pane will appear on the right-hand side of the window.

## Settings

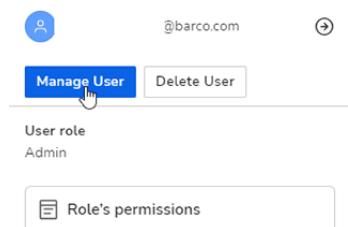


Image 7–4 Example of the details pane

### 2. Click **Manage User**.

The *Manage user* window is displayed.

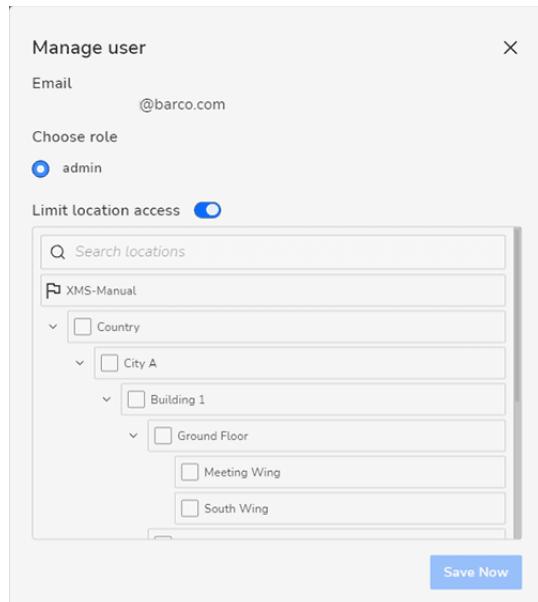


Image 7–5 Example of the Manage user window

### 3. If available to change, update the role of the user.



**Note:** You can only change the role if roles other than your own are available to you.

### 4. If desired, you enable the Limit location access slider.

When enabled, the location picker will be displayed in the window.

### 5. If enabled, you can pick the location(s) the user will have access rights to.

### 6. Click **Save Now** to update the user information.

## 7.2.1.4 Delete user

### How to delete

#### 1. While in the User management window, click on the desired user to change.

The details pane will appear on the right-hand side of the window.

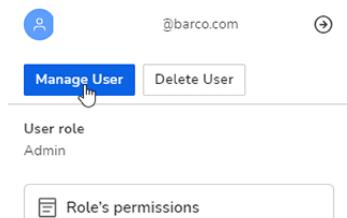


Image 7–6 Example of the details pane

## 2. Click **Delete User**.

A confirmation dialog will be prompted.

## 3. Click **Delete user** to confirm the deletion.

The user is removed from the users list.

## 7.2.2 Roles & permissions

### 7.2.2.1 About roles & permissions

#### About roles and permission management

For each group, permissions are defined. For each permission a type of user can be assigned.

Group	Permission	admin	DocuTest
Audit	View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calender	Manage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	View	<input checked="" type="checkbox"/>	
Devices	Manage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Control	<input checked="" type="checkbox"/>	
	View	<input checked="" type="checkbox"/>	
	Stats	<input checked="" type="checkbox"/>	
	Manage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Image 7–7 Example of the Role and permissions window

- 1 Group
- 2 Permission for the specific group
- 3 Permissions for the default admin role

- 4 Permissions for the custom created role
- 5 Edit button (only for custom roles)
- 6 Add a custom role

#### Role setting per permission

A green V means permission is granted.

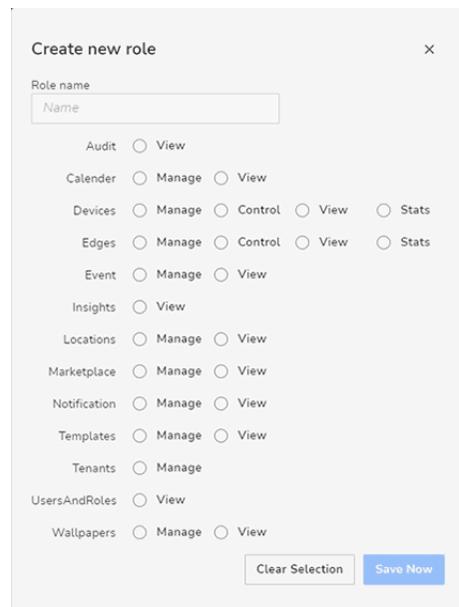
If nothing is filled in, this means no permission is granted.

### 7.2.2.2 Add new role

#### How to add

##### 1. While in the *Roles & Permissions* window, click **Create Role**.

The *Create new role* window is displayed.



The dialog box is titled 'Create new role'. It has a 'Role name' field labeled 'Name' which is empty. Below it is a list of roles: Audit, Calender, Devices, Edges, Event, Insights, Locations, Marketplace, Notification, Templates, Tenants, UsersAndRoles, and Wallpapers. Each role has three permission options: 'Manage', 'Control', and 'View'. The 'Control' and 'View' checkboxes are grouped together for each role. At the bottom are 'Clear Selection' and 'Save Now' buttons, with 'Save Now' being blue and highlighted.

Image 7–8

2. Fill in the name of the user role in the field under *Role name*.
3. Assign what can this role can manage, control, view or just see stats of.
4. Click *Save Now* to save all settings.

The new role is added to the list of *Roles & Permissions*.

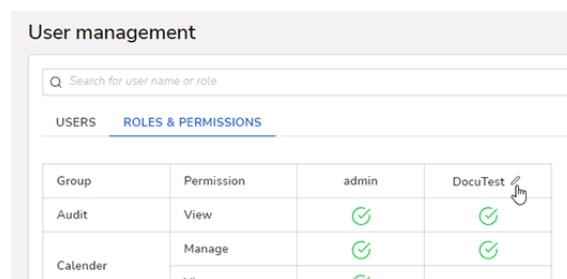
### 7.2.2.3 Role Management – Edit role

#### About Edit role

With this function, you can edit an existing custom role.

#### How to edit a role

1. While in the Roles & Permission page, click on the edit icon of the desired role.



The table has columns: Group, Permission, admin, and DocuTest. The 'Edit' icon is a small blue circle with a white edit symbol, located in the DocuTest column for the 'Calender' row.

Group	Permission	admin	DocuTest
Audit	View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calender	Manage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Image 7–9 The edit icon of a custom role

The Edit role window is prompted.

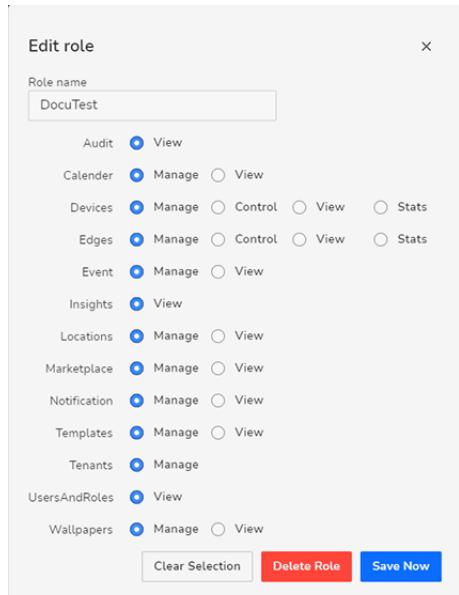


Image 7–10 Example of the Edit role window

2. Edit the *Role name* or leave it as is.
3. Update the list of permissions if necessary.
4. Click Save Now to save the made changes.

#### 7.2.2.4 Delete role

##### How to delete a role

1. While in the Roles & Permission page, click on the edit icon of the desired role.

User management			
<input type="text"/> Search for user name or role			
USERS	ROLES & PERMISSIONS		
Group	Permission	admin	DocuTest 
Audit	View		
Calender	Manage		
	View		

Image 7–11 The edit icon of a custom role

The Edit role window is prompted.

## Settings

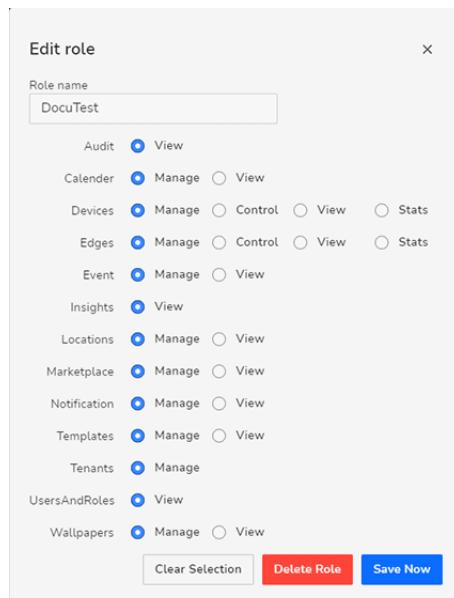


Image 7–12 Example of the Edit role window

### 2. Click **Delete Role**.

A confirmation dialog will be prompted.

### 3. Click **Delete Now** to confirm.

The role will be deleted.

## 7.3 Events configurations

### 7.3.1 About events configurations

#### Overview

Events configurations allow for the management of event triggers severity and relevancy time, providing the freedom to pick and chose which system events matter most.

Event	Severity	Auto-aging	Actions
Button - Pairing failed	Warning	48H	
Button - Pairing success	Info	24H	
Display connected	Info	24H	
Display Disconnected	Critical	24H	
Display - Edid not found	Critical	24H	
Display - Resolution change failed	Critical	24H	
Firmware update - Failed	Warning	72H	
Firmware update - Success	Info	24H	
Peripheral Connected	Info	24H	
Peripheral Disconnected	Critical	24H	
System - CPU critical temperature reached	Critical	8H	
System - Fan stopped	Critical	8H	

Image 7–13

- 1 Search bar
- 2 Sort by
- 3 Action cogs

## Severity and Auto ageing

Severity makes it possible to influence how much certain issues affect the health score when they appear. Based on a scale from 0.1 - 1.0, where 0.1 greatly affects the health score and 1.0 slightly affecting the health score. This makes the system more transparent about the frequency of issues that are deemed more or less important.

Auto ageing dictates how long the notification about the issue persists and affects the health score. The time can only be set on predefined amounts of time. This can be used to track the frequency of certain issues during a given time period.

## Default events and their settings

EVENTS	SEVERITY	AUTO AGEING
Button – pairing failed	0.5 (Warning)	48 hours
Button – pairing success	1.0 (Info)	24 hours
Display connected	1.0 (Info)	24 hours
Display disconnected	0.2 (Critical)	24 hours
Display – edid not found	0.3 (Critical)	24 hours
Display – resolution change failed	0.3 (Critical)	24 hours
Firmware update – failed	0.4 (Warning)	72 hours
Firmware update – success	1.0 (Info)	24 hours
Peripheral connected	1.0 (Info)	24 hours
Peripheral disconnected	0.2 (Critical)	24 hours
System – CPU critical temperature reached	0.1 (Critical)	8 hours
System – fan stopped	0.2 (Critical)	8 hours

### 7.3.2 Search and sort

#### How to search

Enter one of the following items in the search bar:

- Event name
- Severity
- Ageing duration

The moment you start typing the selection will be filtered.

#### How to sort

Click on the one of the following categories to sort them:

- Event name
- Severity
- Ageing duration

The up and down arrows signal when a category is being sorted. If the arrow is pointing up then the sorting is ascending, pointing down is sorting descending and both arrows means the category is not being sorted.

Severity ^      Auto ageing ^

Image 7-14 Example of sorting, the view is being sorted on Severity

### 7.3.3 Manage

1. Click on the actions cog in the same row as the event that must be edited.  
A configuration pop-up will be shown
2. Adjust the weights of the “Health factor” and/or the “Auto dismiss” time to the desired setting.

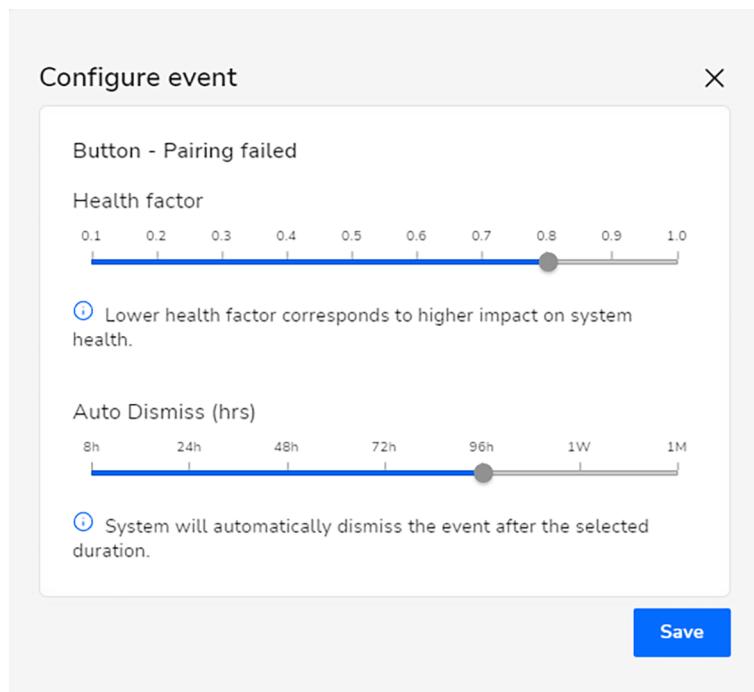


Image 7-15 Example of pop-up with changed weights

 **Note:** Health factor weights 0.1 - 0.3 are marked as “Critical”, 0.4 - 0.9 are marked as “Warning” and 1.0 is marked as “Info”.

3. If the weights have been changed from their defaults, click on “Save” to apply the changes.

 **Note:** Restoring the default weights of an event must be done manually!  
Refer to the table in “[About events configurations](#)”, page 94 for the correct weights.

## 7.4 Firmware settings

### About firmware settings

Firmware settings sets the firmware delivery method per Base Unit model. This will determine what XMS Cloud does with new firmware releases. The available methods are:

- **Manual**, the end user decides when the Base Units are updated to the latest firmware version.
- **Automatic**, XMS Cloud will update all Base Units as soon as a newer firmware version is available.
- **Fixed**, XMS Cloud will keep the Base Units on the specified firmware version.

### How to set the preference

1. Click on the manage arrow “>” under actions of the desired Base Unit model.

Firmware Settings					
<input type="text" value="Search for model, firmware track, preference or version"/> <input type="button" value="Refresh"/>					
Model name	Firmware track	Update preference	Fixed version	Latest version	Action
CB Pro	Standard	Manual	NA	02.21.00	>
CX-30	Standard	Manual	NA	02.21.00	>
CX-50	Standard	Manual	NA	02.20.00	<input type="button" value="Manage"/>
CX-50 gen2	Standard	Manual	NA	02.20.00	>
Total: 4					

Image 7-16

2. Select the desired update method from the drop down box under “Update preference”.

#### Firmware preference

##### Firmware track

Standard

##### Update preference

Manual

**Manual**

Automatic

Fixed

#### Firmware distribution

##### Latest firmware offering

02.20.00.0022

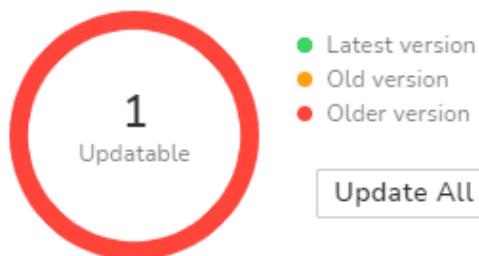


Image 7-17

3. Apply the changes depending on the chosen method:

- For **manual**, click “Apply Changes”.
- For **automatic**, click “Apply Changes”.
- For **fixed**, select the desired firmware version from the drop down box under “Select firmware” and click “Apply Changes”

4. Click on “Update All” to sync all Base Units to the new firmware settings.

The chosen preference and version, in case of fixed updates, will be shown in the overview table.



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