MAKE THE
WORLD SEE

Milestone Systems

Milestone Customer Dashboard

User manual

milestone

Contents

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Introduction

About this manual

This user manual describes:

- The general purpose and functionality of Milestone Customer Dashboard.
- How to browse the Milestone Customer Dashboard.
- How Milestone Customer Dashboard interacts with your XProtect VMS product.

Milestone Customer Dashboard

Milestone Customer Dashboard is a free online tool for Milestone partners, resellers, and XProtect VMS users to manage and monitor Milestone software installations and licenses.

Milestone Customer Dashboard contains tools for:

- Managing information about your installations
- Registration and activation of licenses
- Real-time status overview of the system's health and performance
- Email notifications and error filtering in XProtect VMS installations

Getting started

Setting up users and user types

> If your company has a My Milestone account and your My Milestone administrator has defined you as a user with the role **License User** or **License Admin**, you can log in to Milestone Customer Dashboard with your My Milestone credentials from any computer with an internet connection either through My Milestone or directly in Milestone Customer Dashboard (https://online.milestonesys.com/).

If you are the administrator of your organization's VMS, you need a My Milestone account to access Milestone Customer Dashboard. Create an account from the Milestone website (https://www.milestonesys.com).

As an administrator of a company's My Milestone account, you can use the **User Administration** page on My Milestone to define Milestone Customer Dashboard users and their access permissions. All users have their own login information and are linked to your company account.

You can define two user types with different access permissions for tasks related to software licenses:

User type	Description
License User	Manages the software licenses that you have given the license user access to. The license user can: • Upload license request (.lrq) files to activate device licenses for a customer. • Download software license (.lic) files and receive activated license files, which are used to install and update customer installations. • Set up Milestone Care™ reminders to send alerts when Milestone Care subscriptions need to be renewed.
License Admin	• Manages all software license information for all customers associated with your company. • Managed license user accounts.

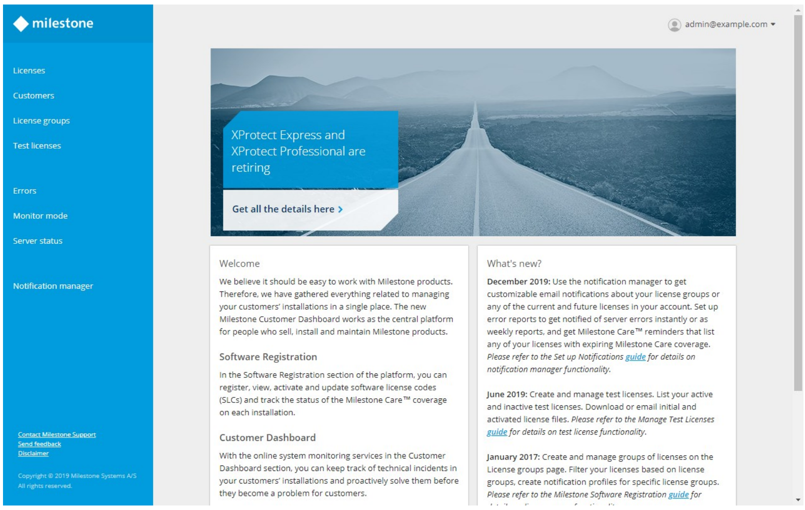
Log in

To log in to Milestone Customer Dashboard:

1. Open a web browser.
2. Enter the web address to Milestone Customer Dashboard (https://online.milestonesys.com/).
3. Click **Continue** to go to the login page for My Milestone.
4. Log in using your My Milestone login information.

> If you do not remember your login information, select **Forgot your password**. If you do not have login information to Milestone Customer Dashboard, see Access to Milestone Customer Dashboard.

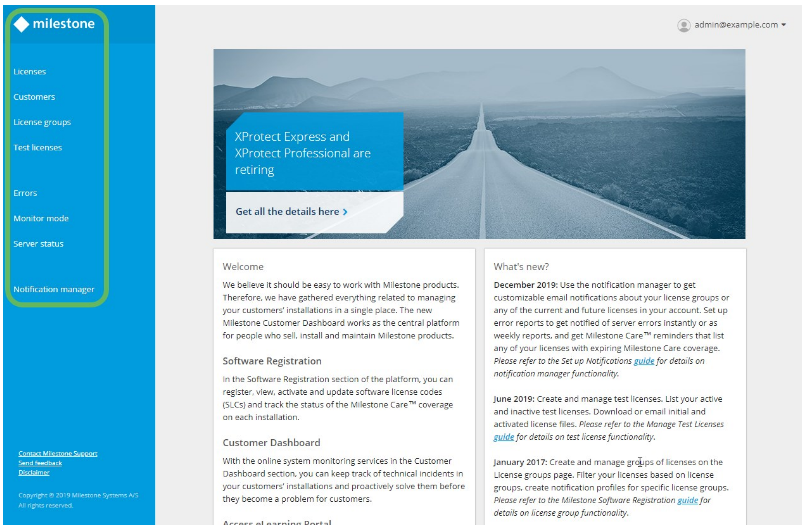
The Milestone Customer Dashboard main page appears.



On the left-hand side of the main page is the main menu, which is used to navigate to the different pages of Milestone Customer Dashboard (see Browsing Milestone Customer Dashboard on page 8).

Browsing Milestone Customer Dashboard

You can browse Milestone Customer Dashboard using the main menu on the left-hand side of the interface.

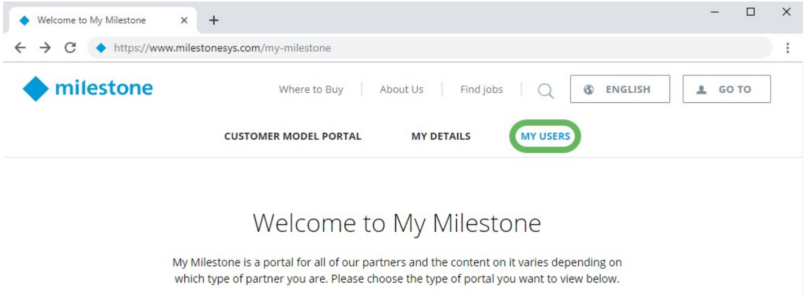


Menu items	Description
Milestone logo	Return to the Milestone Customer Dashboard main page.
Licenses	See a list of licenses associated with your account, as well as options related to license management.
Customers	See a list of customers that you have created, including the number of licenses and servers associated with each customer.
License groups	Create, edit, or delete license groups or search for a specific license group. License groups are used for receiving error notifications from groups of systems. See License groups on page 32.
Test licenses	Manage test licenses, which are used for demonstration and training purposes of XProtect VMS installations. See Test licenses on page 35.
Errors	Keep track of technical incidents in your customers' installations.
Monitor mode	See the status messages of any of the systems that you monitor for your customers.
Server	See if a server is monitored by Milestone Customer Dashboard, and the current error state

Menu items	Description
status	of the server. You can search for and filter for servers and error states, and you can also create PDF reports about servers that you select.
Notification manager	Manage customizable emails that report the errors of a given server and the status of the Milestone Care™ coverage of your licenses. See Notification manager on page 72.

Give users access to Milestone Customer Dashboard

1. Log in to My Milestone (https://www.milestonesys.com/my-milestone/).
2. In the main menu, select **My Users**.



> If you do not have access to **My Users**, contact the administrator of your company's My Milestone account.

3. In the bottom-right corner of the **User administration** page, select **Add New User**.
4. In the **User details** page, enter the required contact information, select the appropriate user role, then select **Submit**.

Related topics:

- Setting up users and user types on page 7

User settings page

Change the language

You can change the language of the Milestone Customer Dashboard interface and system reports. To change the language:

1. In the upper right-hand corner, select your login name, then select **User settings**.
2. On the **User settings** page, under **Language and region**, select the desired language in the **Language** list.
3. Select **Save** to apply the changes.

Change the time zone

The default value of the time zone reflects your current physical location as detected by Milestone Customer Dashboard. You can select the time zone that you want to appear in error timestamps, in the Milestone Customer Dashboard interface, and in the reports that you create.

1. In the upper right-hand corner, select your login name, then select **User settings**.
2. On the **User settings** page, under **Language and region**, select the desired time zone in the **Time zone** list.
3. Select **Save** to apply the changes.

Change the date format

Select the date format that you want to appear in the Milestone Customer Dashboard interface and in the reports that you create.

1. In the upper right-hand corner, select your user name and select **User settings**.
2. On the **User settings** page, under **Language and region**, select the desired date format in the **Date format** list.
3. Select **Save** to apply the changes.

Specify rows per page

Select how many rows per page you want to see in grid fields in Milestone Customer Dashboard.

1. In the upper-right corner, select your login name and select **User settings**.
2. On the **User settings** page, under **Language and region**, select the number of rows per page from the **Rows per page**. You can choose between 10, 25, 50, or 100.
3. Select **Save** to apply the changes.

Licenses page

Register software license codes (SLCs)

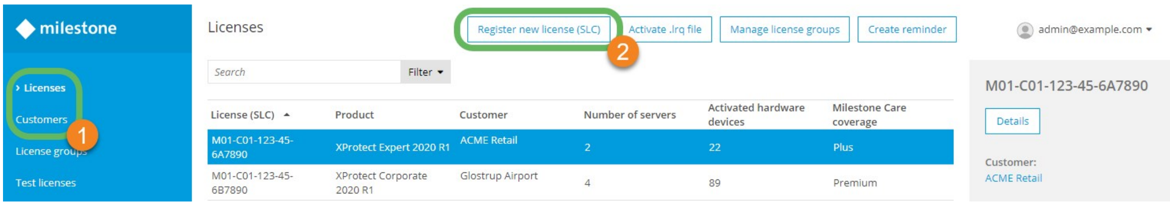
If you register a software license code (SLC) in Milestone Customer Dashboard, you can:

- Track the licenses that you sell to customers.
- Assign licenses to customers.
- Set up monitoring of your customers' VMS installations.

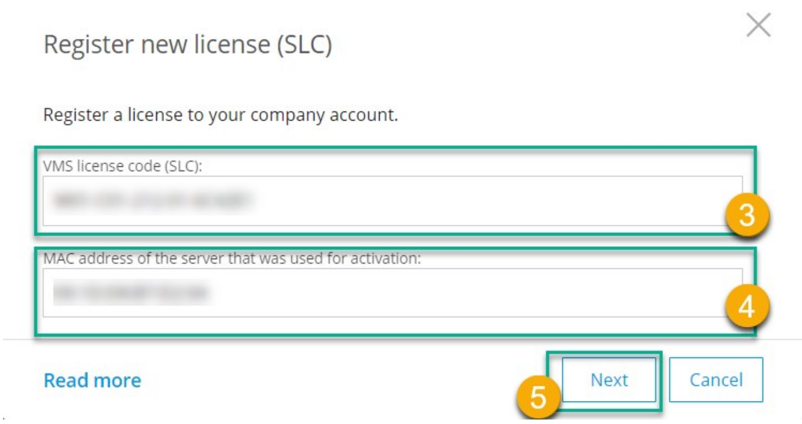
> Distributor, resellers, integrators and end-users can all register licenses. Each role can only register a license once.

To register an SLC:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. In the main menu, select **Licenses** or **Customers** ❶, then select **Register new license (SLC)** ❷.



3. In the **Register new license** window, in the **License code (SLC)** field, enter the SLC ❸.
4. In the **MAC address of the server that was used for activation** field, enter the MAC address of the server that you used to activate the license on ❹.
5. Click **Next** ❺.



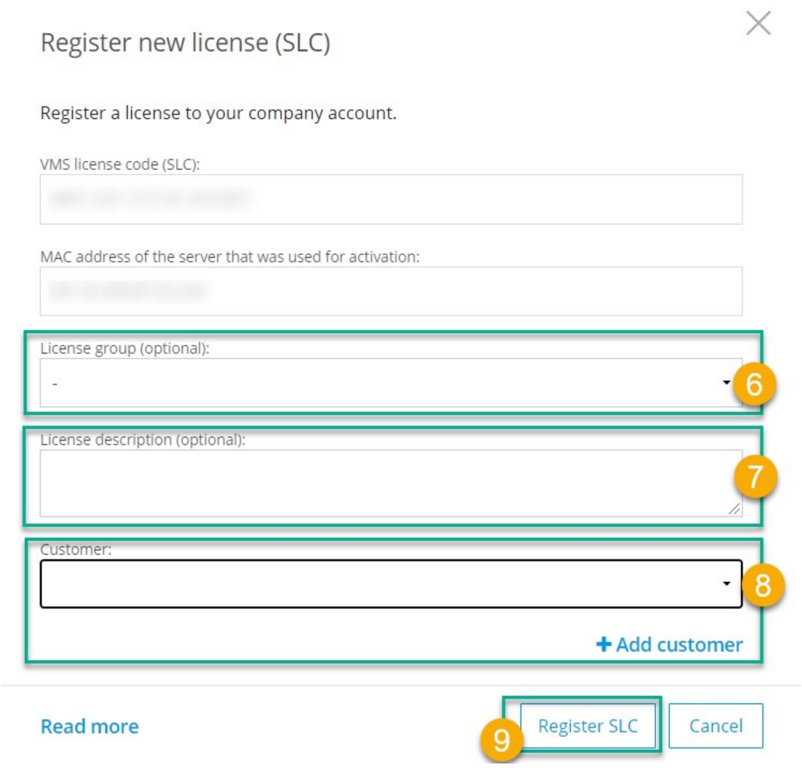
6. Optional: In the **License group** field, assign the SLC to an existing license group 6.
7. Optional: In the **License description** field, enter a custom description of the license 7.

> You can search by license description on the **Licenses** page in the **Search** field.

8. To associate the SLC with a customer 8:
    - For an existing customer, select a customer in the **Customer** list
    - For a customer that has not yet been created in Milestone Customer Dashboard, select **Add customer**, enter a new customer name, and select **Save**

> Only distributors, resellers and integrators can associate SLCs with customers.

9. Select **Register SLC** 9. The new license is added to the **Licenses** list.



Specify a customer name for a license

Specify a customer name to see how your licenses are distributed. You can view the list of the customers you created on the **Customers** page.

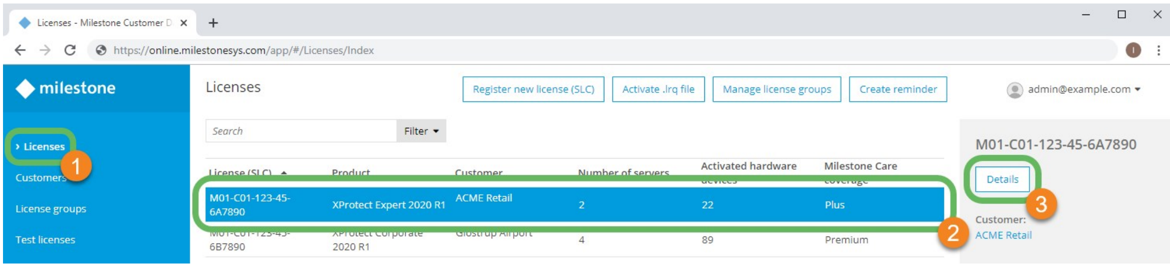
If you do not specify a customer name during the license registration, the customer becomes **Unspecified** in the **Licenses** list.

> You must specify a customer name before you download or email the initial .lic file.

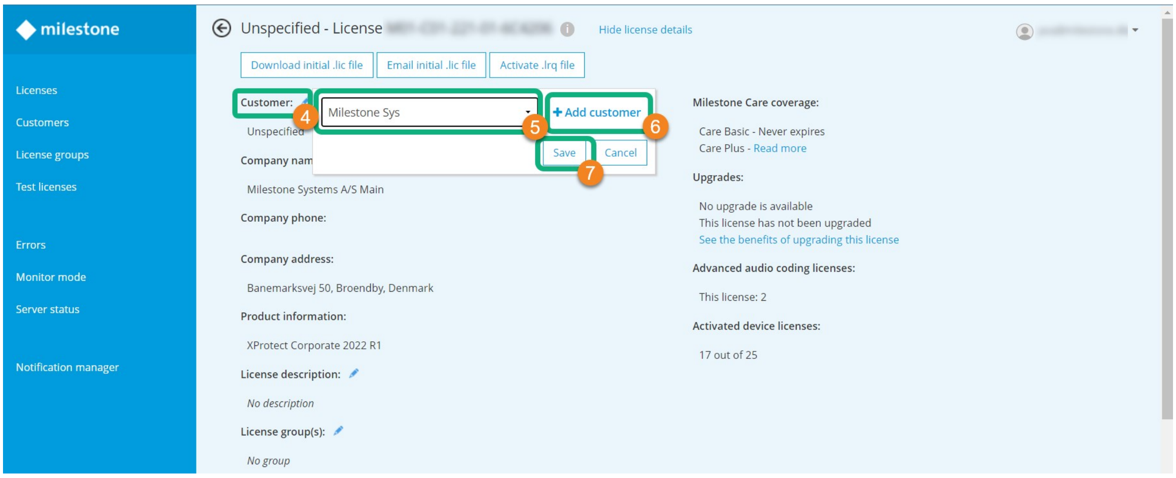
1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. In the main menu, select **Licenses** ❶.
3. Locate the license for which you want to specify a customer.

   > Search for a specific license by SLC using the **Search** field.

4. Select the license ❷ and select **Details** ❸.



5. On the **Details** page, select the pencil icon next to the **Customer** entry ❹.
6. Select a customer from the list ❺ or select **Add customer** ❻ to specify a new customer.



7. Select **Save** ❼ to apply the changes.

Search for, sort, and filter licenses

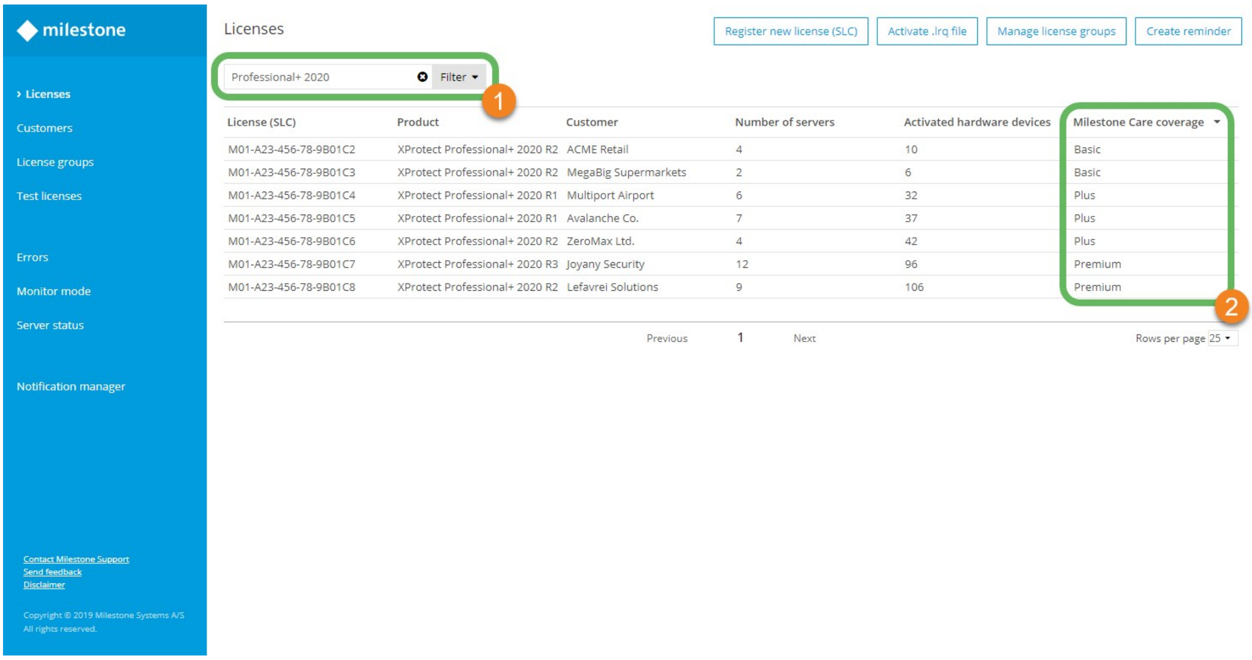
In Milestone Customer Dashboard, you can find and view your licenses by:

- Searching for licenses
- Sorting the license display columns
- Filtering displayed licenses

The **Search** field 1 on the **Licenses** page lets you search for a license based on:

- SLC number
- VMS product and version
- License description
- Customer name
- Milestone Care coverage

Select the relevant column header to sort the information alphabetically based on the selected column 2.



You can filter your licenses based on license status, the Milestone Care™ coverage of the license, and by license groups. With the **Filter** option, you can find SLCs that have Milestone Care coverage that run older software versions or will soon expire.

1. Select **Filter** to view the different filter options.

2. Select one or more filter options. You can filter by:

Status

Name	Description
Any	No filtering on the status of the software license.
All active licenses	Filter for software licenses that are currently active.
Obsolete licenses	Filter for software licenses: • That have been upgraded, and the displayed SLC is no longer active • Past their expiration date
Upgrade available	Filter for software licenses where an upgrade covered by Milestone Care is available.

Care Plus status

Name	Description
Any	No filtering on the status of the Milestone Care™ coverage.
Upcoming renewal (60 days)	Filter for all software licenses with a Milestone Care Plus coverage that expires within 60 days. You can set up email notifications for a software license. Notifications are sent 100 and 20 days prior to the expiration of Milestone Care Plus. See Set up Milestone Care™ reminders on page 75.
Milestone Care Plus expired	Filter for all licenses with an expired Milestone Care Plus coverage. You can set up email notifications for a software license. Notifications are sent 100 and 20 days prior to the expiration of Milestone Care Plus. See Set up Milestone Care™ reminders on page 75.

License group

Name	Description
All licenses	Filter for all licenses associated with your account.
[Name of group]	Filter for licenses that are part of the selected license group.

Combine search, sort, and filter to find specific licenses in a larger list.

3. Select **OK**.

View license details

Milestone Customer Dashboard stores detailed information about each of your licenses, which you can view on the **Licenses** page:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. Select the **Licenses** page.
3. Find the license that you want to see details about.

   For help locating a license, see Search for, sort, and filter licenses on page 14.

4. Select the relevant license and select **Details** in the preview pane on the right-hand side.

   To select the relevant license, you can also double-click the license row

License details page (properties)

To view the license details, View license details on page 18.

The table below lists the elements of the license details page and whether they can be searched for from the **Search** field on the **Licenses** page (see Search for, sort, and filter licenses on page 14). Entries that you can edit are marked by a pencil icon .

License actions

Button	Description
Download initial .lic file	Download the initial software license (.lic) file that is used during the installation of a new VMS system. See Get a software license (.lic) file on page 23
Email initial .lic file	Send the initial software license (.lic) file to one or more email recipients. See Get a software license (.lic) file on page 23
Activate .lrq file	Activate a license request (.lrq) file that is used to generate an activated software license (.lic) file. See Activating licenses on page 22.
Send license registration link	Send a license registration link to a customer in an email. Copy or send a license registration link on page 24.
Upgrade license	Your license is linked to a particular XProtect VMS release version. You can upgrade your license to use a newer version of the VMS. The button is visible when an upgrade is available for the selected XProtect VMS product. See Upgrade a software license on page 26.

License details

Field	Description	Searchable
Customer	The name of the customer that is associated with this license (see Specify a customer name for a license on page 13). If there is no associated customer, the word **Unspecified** appears.	Yes
Company name	The company name that is associated with the license. Milestone Customer Dashboard adds the company name automatically when the customer registers the license.	No
Company phone	The company phone that is associated with the license. Milestone Customer Dashboard adds the company phone automatically when the customer registers the license.	No
Company address	The company address that is associated with the license. Milestone Customer Dashboard adds the company address	No

Field	Description	Searchable
	automatically when the customer registers the license.	
Product information	The product and version that the software license provides.	Yes
License description	Any custom description of the license.	Yes
License group(s)	Lists the license groups that this license belongs to.	No
Milestone Care coverage	Lists the Milestone Care™ coverages for the selected license and their expiration dates.	No
Upgrades	If the license has been upgraded, lists the obsolete SLC of the previous license and the new SLC for the upgraded license. If the license has not been upgraded, see whether a license upgrade is available or not (see License upgrades on page 25).	No
Advanced audio coding licenses	The number of licenses for advanced audio coders and decoders.	No
Activated device licenses	The number of activated hardware devices in the customer's VMS system out of the total number of device licenses related to this SLC. The number is updated every time a license is activated.	No

Servers

Field	Description	Searchable
Servers	Lists all the servers where this license is used in the customer's system. The list is updated every time a license is activated.	No
Server name	The name of the server.	Yes
Location	The location where a license is used.	No

Field	Description	Searchable
Server description	Any custom description of the server.	Yes
Activated device licenses	The number of activated hardware devices in the customer's VMS system out of the total number of device licenses related to this SLC. The number is updated every time a license is activated. Also shows the number of activated device licenses on other sites out of the customer's total number of device licenses on this SLC.	No

Extensions and plug-ins

Field	Description	Searchable
Product	Name of the extension or plug-in that is associated with the license.	No
Software License Code	The products' software license code (SLC).	No
Expiration date	The expiration date of your SLC. Typically, the expiration date is unrestricted.	No
Developed by	The company that developed the product.	No

Activated device licenses

Field	Description	Searchable
Date	The date that the device license was activated on.	No
MAC address	The MAC address of the hardware where the license is used.	No

Field	Description	Searchable
DLK description	Any custom description of the Device License Key (DLK).	No
Device name	The device name as recognized by the VMS.	No
Licenses used	The number of licenses the device is using.	No

Activating licenses

To learn more about licenses in XProtect, see the Licensing section in the XProtect VMS Administrator manual.

You must activate a license after you:

- Install an XProtect VMS product with a registered software license (.lic) file
- Add hardware devices in XProtect Management Client.
- Add or modify XProtect VMS extensions and plug-ins
- Add Milestone Interconnect™ sites
- Upgrade to a newer version of an XProtect VMS product, including service releases

There are several steps in the license activation process. The process takes place:

- On the My Milestone portal
- In XProtect Management Client
- In Milestone Customer Dashboard

Depending on your organization, the steps may be performed by different people.

Step	Where?	What?
1	Email, Milestone Customer Dashboard	You receive an email that includes a software license code (SLC) and a software license file (.lic).

Step	Where?	What?
		In case the original file was lost, you can get the initial .lic file from Milestone Customer Dashboard.
2	My Milestone	You register the SLC on the My Milestone portal. In case the original link was lost, you can get a new license registration link from Milestone Customer Dashboard. See Copy or send a license registration link on page 24.
3	Milestone Customer Dashboard	You register the SLC in Milestone Customer Dashboard. See Register software license codes (SLCs) on page 12.
4	XProtect Management Client	You activate the license. (For offline activation only) You download an .lrq file. The .lrq file must be activated in Milestone Customer Dashboard.
5	Milestone Customer Dashboard	(For offline activation only) You upload the .lrq file to Milestone Customer Dashboard and download a new .lic file. See Get a software license (.lic) file on page 23.
6	XProtect Management Client	(For offline activation only)You upload the .lic file to finish the offline activation process.

Get a software license (.lic) file

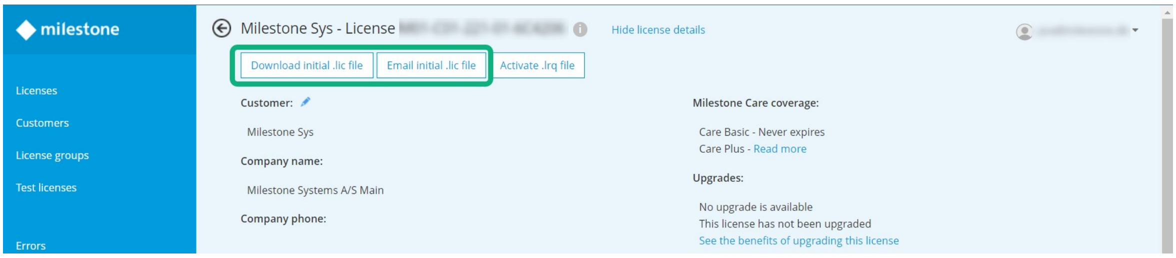
If a software license code (SLC) is registered in Milestone Customer Dashboard, you can get the associated software license (.lic) file that is used when installing a VMS system.

To get a software license (.lic) file:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. Select **Customers** or **Licenses** in the main menu.
3. On the **Customers** page, double-click a customer, then double-click an associated **License (SLC)**. Alternatively, double-click an SLC on the **Licenses** page.

4. Select **Download initial .lic file** to download the license file directly, or select **Email initial .lic file** to open the **Email initial license file** window to send an email containing the license file to one or more recipients.

> You must specify a customer name before you download or email the initial .lic file.



> The license (SLC) must be associated with a product version 8.1 or newer and must not be a plug-in license in order to provide a software license (.lic) file.

Copy or send a license registration link

Customers can register licenses with their My Milestone accounts. When a customer registers a license on the My Milestone portal, the company details of the customer appear in Milestone Customer Dashboard on the license details page.

To send a license registration link to a customer:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. Select the **Licenses** page.
3. Find the license that you want to see details about.

> For help locating a license, see Search for, sort, and filter licenses on page 14.

4. Select **Send license registration link.**
5. Copy the link to share it with the customers directly, or add the recipients email addresses to send an email containing the license registration link to one or more recipients.

License upgrades

> To upgrade your Milestone product, you must have, or have had in the past, a valid Milestone Care Plus subscription. You can upgrade to a Milestone product that was released on or before the expiration date of your Milestone Care Plus subscription.

When you purchase a Milestone product, you receive a software license code (SLC) that is registered at point-of-purchase or through Milestone Customer Dashboard. When you upgrade a license, Milestone Customer Dashboard registers a new SLC and transfers all the installation and customer information to the new SLC.

After you upgrade a license, Milestone Customer Dashboard provides you with an upgraded software license (.lic) file, see

Use the upgraded software license (.lic) file to upgrade your XProtect VMS installation with the new product version and SLC. See the XProtect VMS Administrator manual.

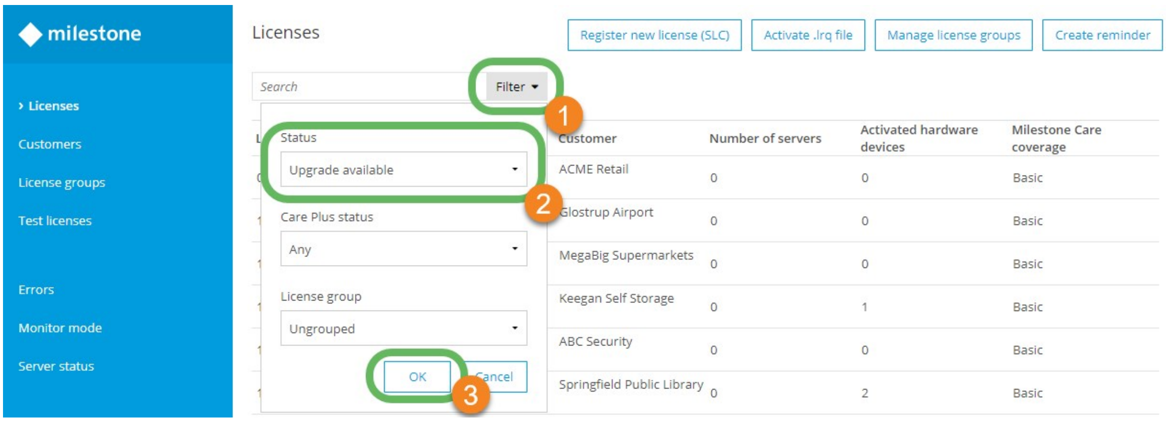
Once you have upgraded your VMS product, you must activate the license, see Activating licenses on page 22.

Filter by licenses with upgrades available

You can view only licenses that are eligible for upgrade in Milestone Customer Dashboard. This is useful if you manage multiple licenses.

To filter for licenses with available upgrades:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. Select **Licenses** in the main menu.
3. Select **Filter** ❶, then from the **Status** list, select **Upgrade available** ❷, then select **OK** ❸.



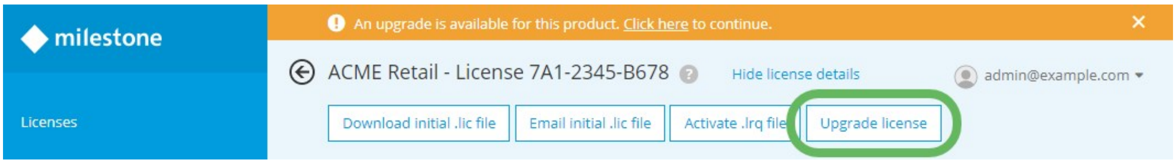
All the licenses that are eligible for upgrade appear.

You can now upgrade the relevant licenses, see Upgrade a software license on page 26.

Upgrade a software license

When an upgrade is available for your XProtect VMS product, you will see a notification in Milestone Customer Dashboard prompting you to upgrade your software license and download the new product installer.

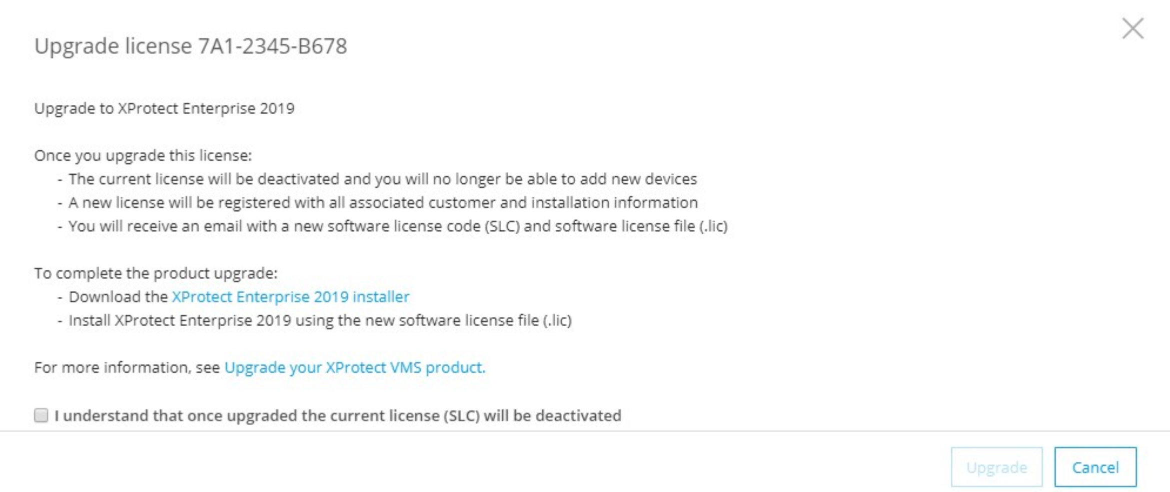
1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. Select **Customers** or **Licenses** in the main menu.
3. On the **Customers** page, double-click a customer, then double-click an associated **License (SLC)**. Alternatively, double-click an SLC from the **Licenses** page.
4. If an upgrade is available for the license, an orange bar appears at the top of the page. To start the upgrade process, select **Upgrade license** or the **Click here** link in the orange bar.



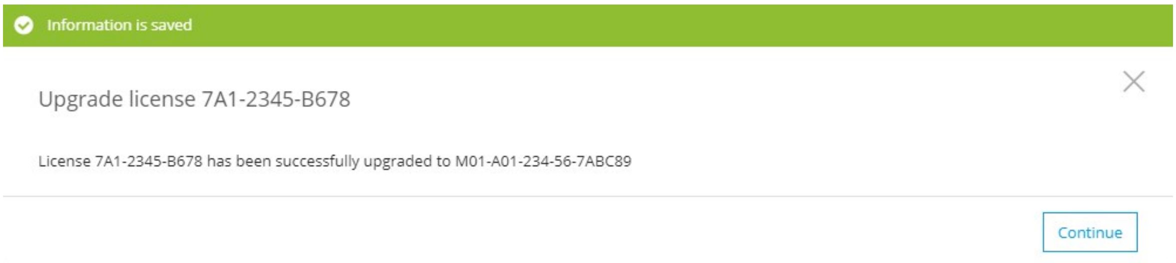
5. The **Upgrade license** window appears, detailing the license upgrade process. After a license is upgraded, a new software license code (SLC) will be registered with all associated installation and customer information.

> ⚠ After you upgrade the software license, you can no longer use the previous license in your XProtect VMS installations.

Select the **I understand that once upgraded the current license (SLC) will be deactivated** check box, then select **Upgrade**.



6. After the upgrade process finishes, a confirmation window shows the previous SLC for the license that you upgraded, and the new SLC for the upgraded license. You also receive an email with the new SLC and software license (.lic) file.



7. Select **Continue**.

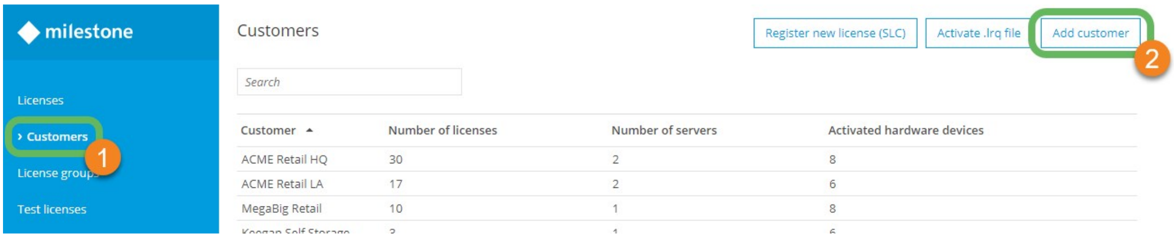
After you have upgraded your license in Milestone Customer Dashboard, you are ready to upgrade your XProtect VMS installation with the upgraded software license (.lic) file. See the XProtect VMS Administrator manual.

Customers page

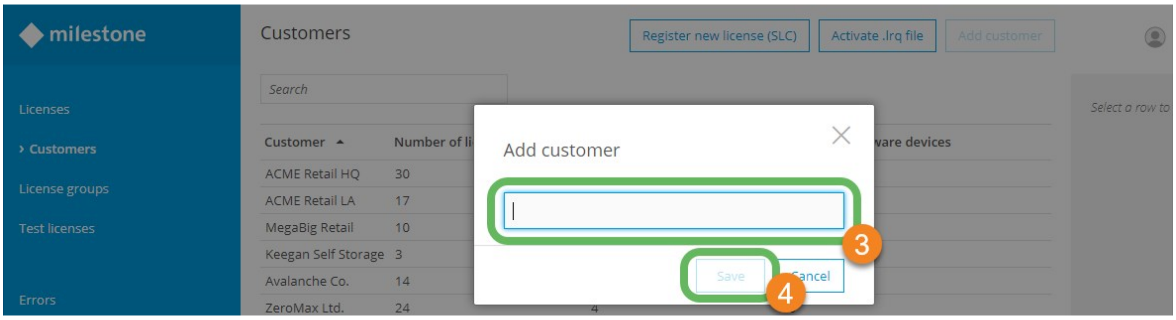
Add a customer

Create customers in Milestone Customer Dashboard to associate them with your licenses. To create a customer:

1. In the main menu, select **Customers** ❶.
2. Select **Add customer** ❷.



3. In the **Add customer** field ❸, enter a name for the customer.



4. Select **Save** ❹ to add the customer.

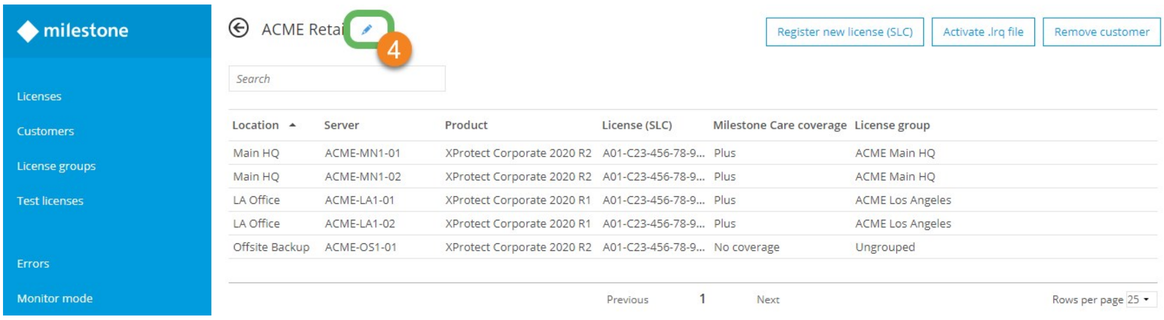
To associate the customer with a software license code (SLC), see Specify a customer name for a license on page 13.

Edit a customer

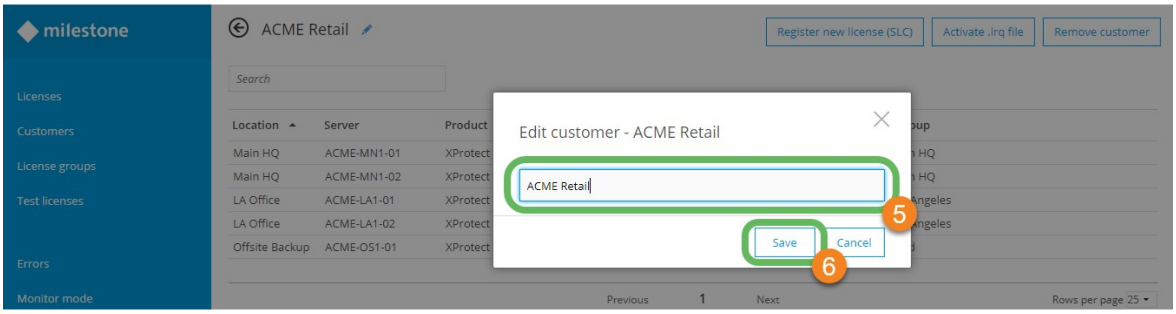
Edit the name of a customer to change the way that it appears in Milestone Customer Dashboard:

1. In the main menu, select **Customers** 1.
2. Select the customer that you want to rename 2 and select **Details** 3.

3. Select the pencil icon to the right of the customer name 4.



4. Enter in a new customer name in the **Edit customer** field 5 of the window.



5. Select **Save** 6 to apply the new customer name.

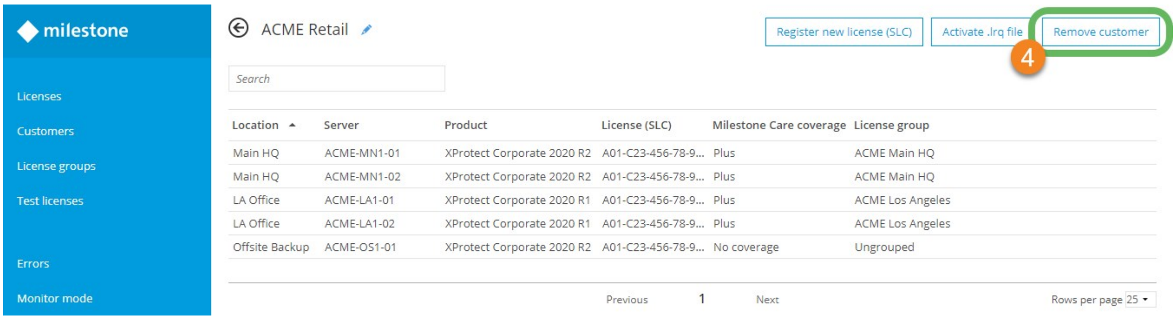
Remove a customer

If you no longer work with a specific customer or want to free up the associated licenses, you can remove the customer from Milestone Customer Dashboard.

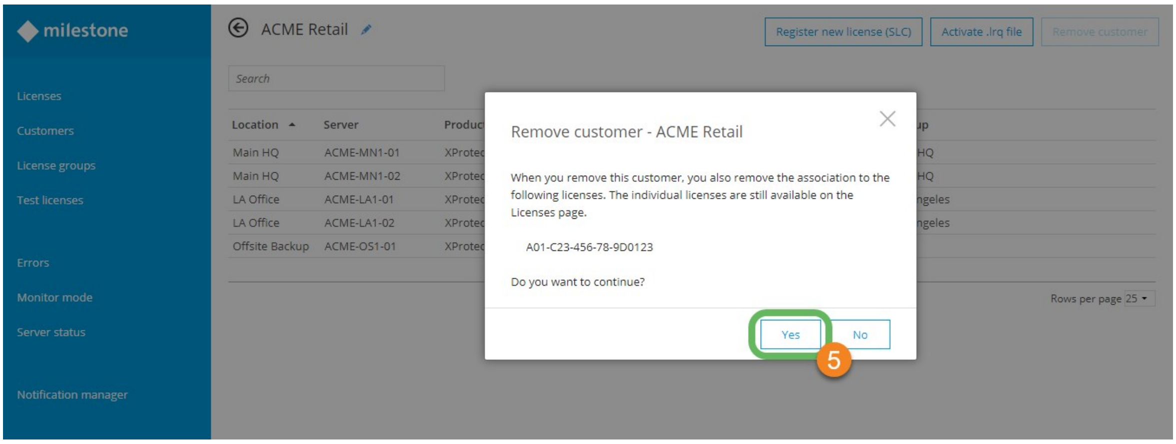
> When you remove a customer, all associated licenses are listed as **Unspecified** on the **Licenses** page.

1. In the main menu, select **Customers** ❶.
2. Select the customer ❷ that you want to rename and select **Details** ❸.

3. Select **Remove customer** ❹.



4. Select **Yes** ❺ to confirm that you want to remove the customer.

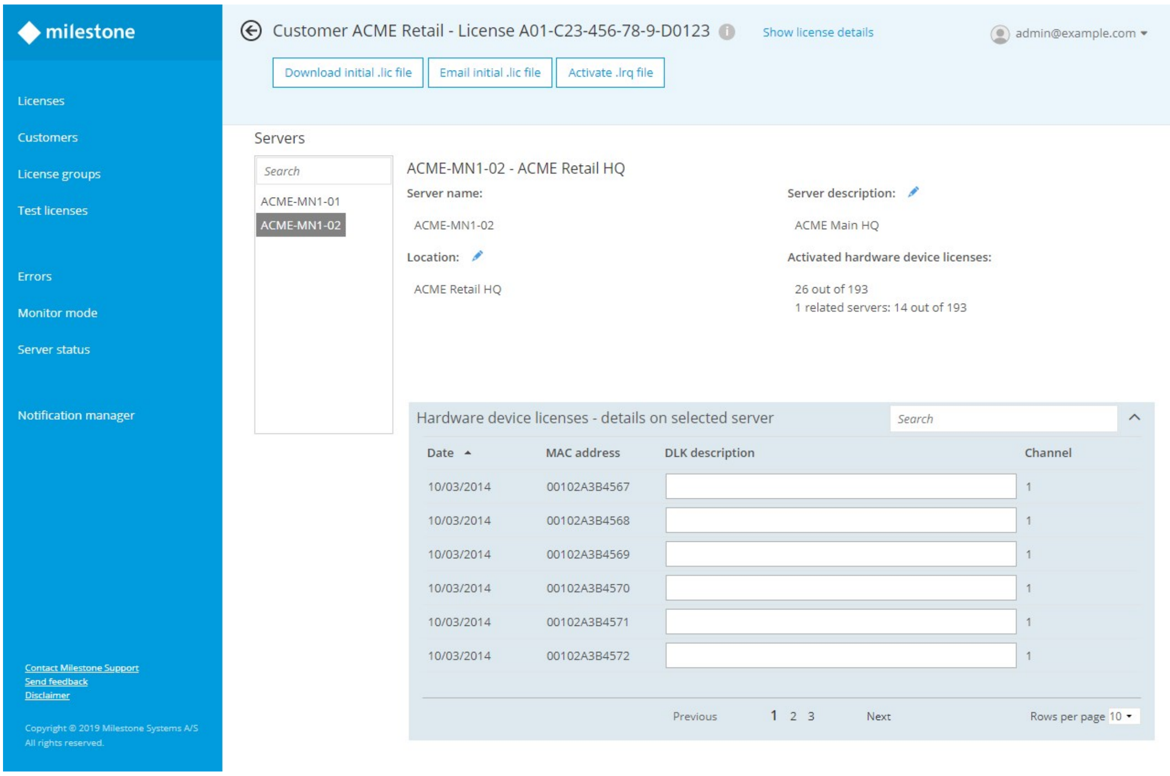


View server locations and licenses

For each customer, you can see a list of all the servers that you have added to this customer. For each server, Milestone Customer Dashboard provides the name, location, description, and the number of activated device licenses.

1. In the main menu, select **Customers** ❶.
2. Select a customer ❷ that you want to view servers for, and select **Details** ❸.

3. In the server details section, you can see relevant information about the server. Editable entries are marked by the pencil icon.



> ⚠ If the customer is linked to licenses that are not actively used in VMS installations, there will be no associated servers.

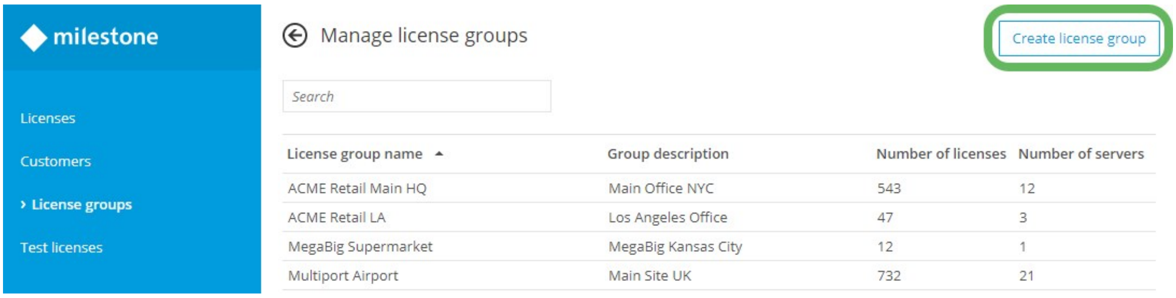
License groups page

License groups

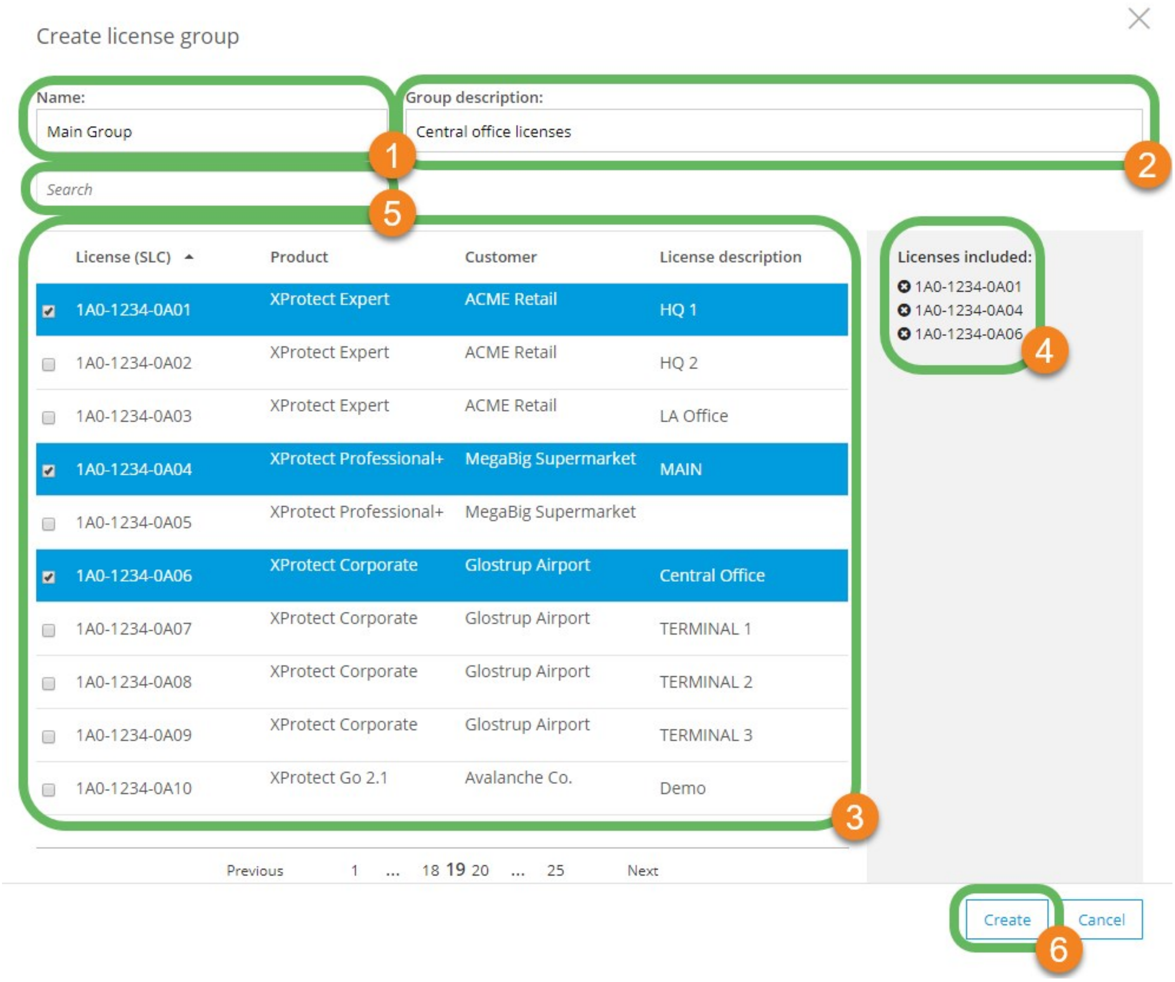
Manage multiple licenses at once by adding licenses to license groups, which is useful if you have many licenses. A license may belong to more than one license group based on VMS product, customer, internal contact, and more. You can also search for and create notification profiles by license group name and description.

Create a license group

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. In the main menu, select **License groups**.
3. Select **Create license group**.

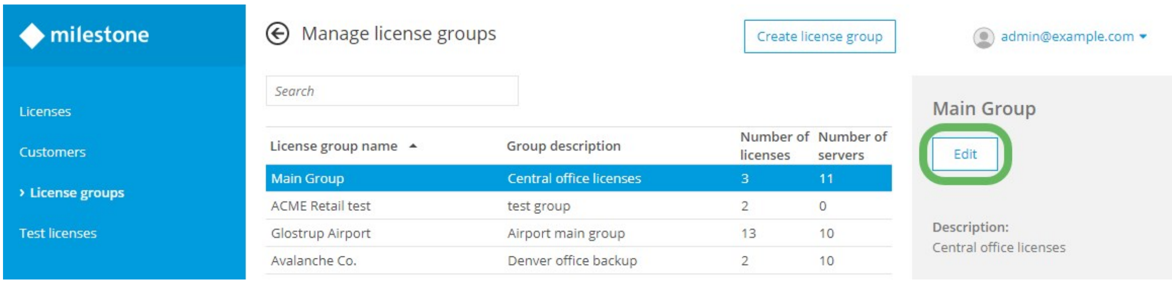


4. In the **Create license group** window:
    1. In the **Name** ❶ field, enter a name for the license group.
    2. Optional: In the **Group Description** ❷ field, enter a description of the group.
    3. In the main section of the window ❸, select licenses that you want to add to the group. Remove added licenses from the right-hand side of the window ❹, or by selecting them again in the main section.
    4. Optional: in the **Search** ❺ field, search by license, product, customer, or description.
    5. Select **Create** ❻.



Edit or delete a license group

1. Select an existing license group and select **Edit**.



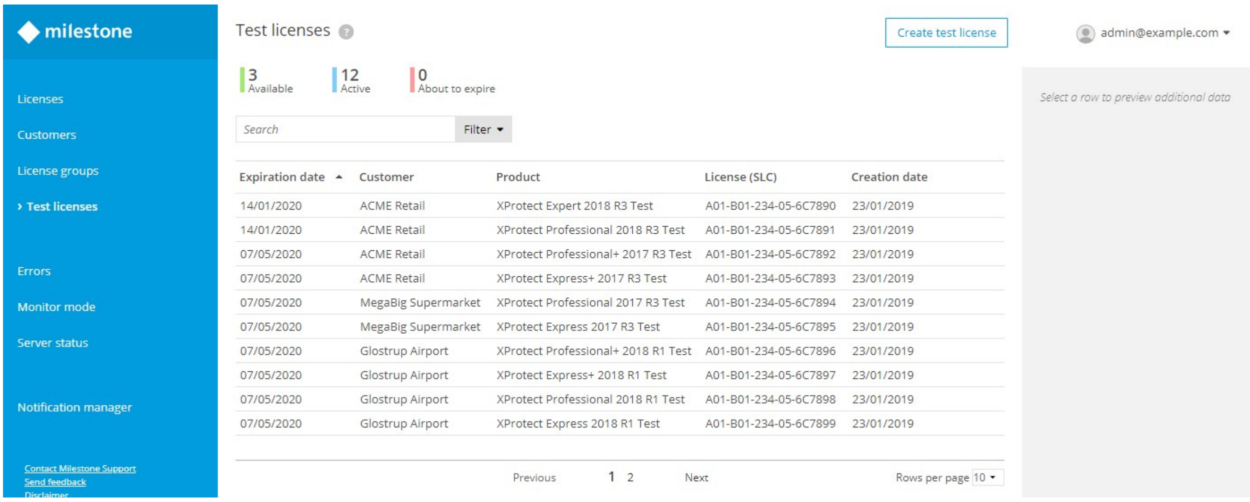
2. In the **Edit license group** window, you can edit the name and description of the license group and add or remove licenses in the group.
3. Select **Save** to save your changes.
4. Alternatively, select **Delete** to delete the license group.

Test licenses page

Test licenses

Test licenses are used for demonstration and training purposes of XProtect VMS systems. You can use the **Test Licenses** page in Milestone Customer Dashboard to manage all the test licenses related to your account.

> A test license supports a limited number of cameras and expires 365 days after it becomes active.



Test licenses can have three states:

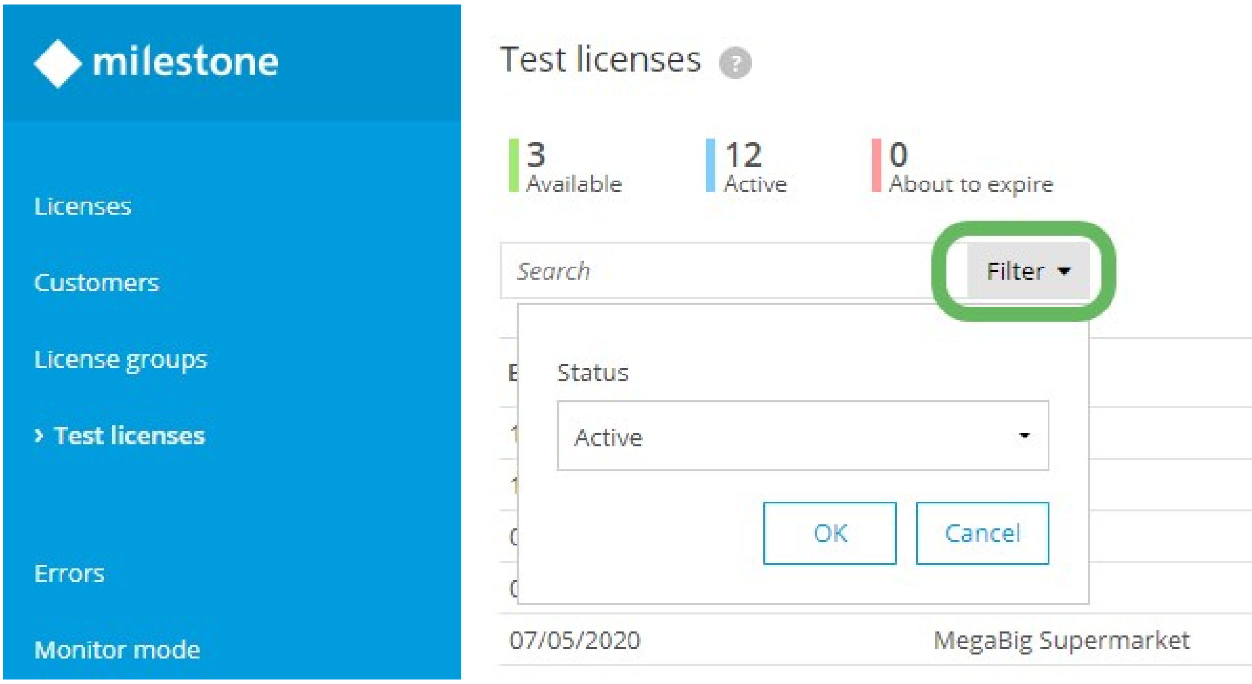
- **Available** - Test licenses that you have available to create, as determined by your account
- **Active** - The number of test licenses that have not been deactivated and have not expired
- **About to expire** - The number of test licenses that expire within 30 days.

> You have a fixed number of test licenses available to manage. You cannot increase your total number of test licenses within Milestone Customer Dashboard. For additional test licenses, contact your local Milestone representative.

Manage test licenses

Test licenses that you have created are displayed as a table and sorted by **Expiration date** by default. Use the **Search** field to search for test licenses by **Customer** name, **Product**, or associated **License (SLC)**.

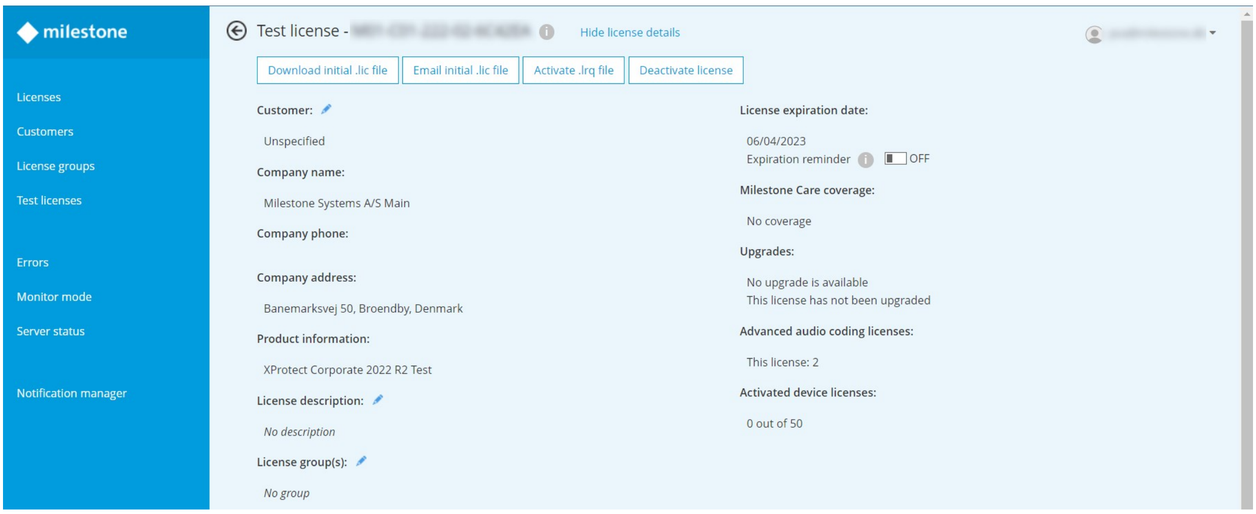
On the **Test licenses** page, select the **Filter** dropdown list to see test licenses according to **Status** (**Active**, **Inactive**, or **About to expire**). **Inactive** test licenses are licenses that are deactivated or have expired, and do not count against your pool of available licenses.



Double-click a test license to view the details of the test license. On this page, see the associated **Customer** and **Product**, as well as **Activated hardware device** licenses.

Select next to the **Customer**, **License description**, and **License group(s)** fields to:

- Associate the test license with another customer
- Add a license description
- Add the test license to a license group, respectively



You can see the **License expiration date** for the selected test license and enable email reminders by turning on **Expiration reminder**. Email reminders are sent 100 and 20 days before the license expires.

Select **Download initial .lic file**, **Email initial .lic file**, and **Activate .lrq file** to enable the selected test license in your VMS installation.

Related topics:

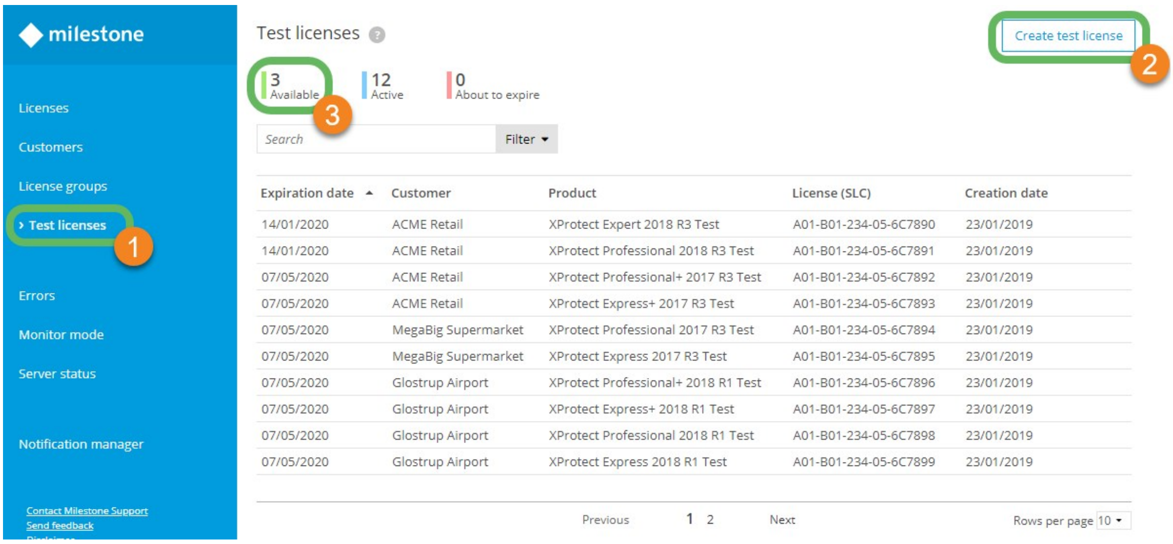
- Get a software license (.lic) file on page 23

Create a test license

Test licenses are used for demonstration and training purposes of Milestone products. To create a test license:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. In the main menu, select **Test licenses** ❶.
3. Select **Create test license** ❷.

> If you have zero **Available** ❸ test licenses to create, **Create test license** ❷ is disabled. You must deactivate a test license to increase your number of available test licenses. See Deactivate a test license on page 38.



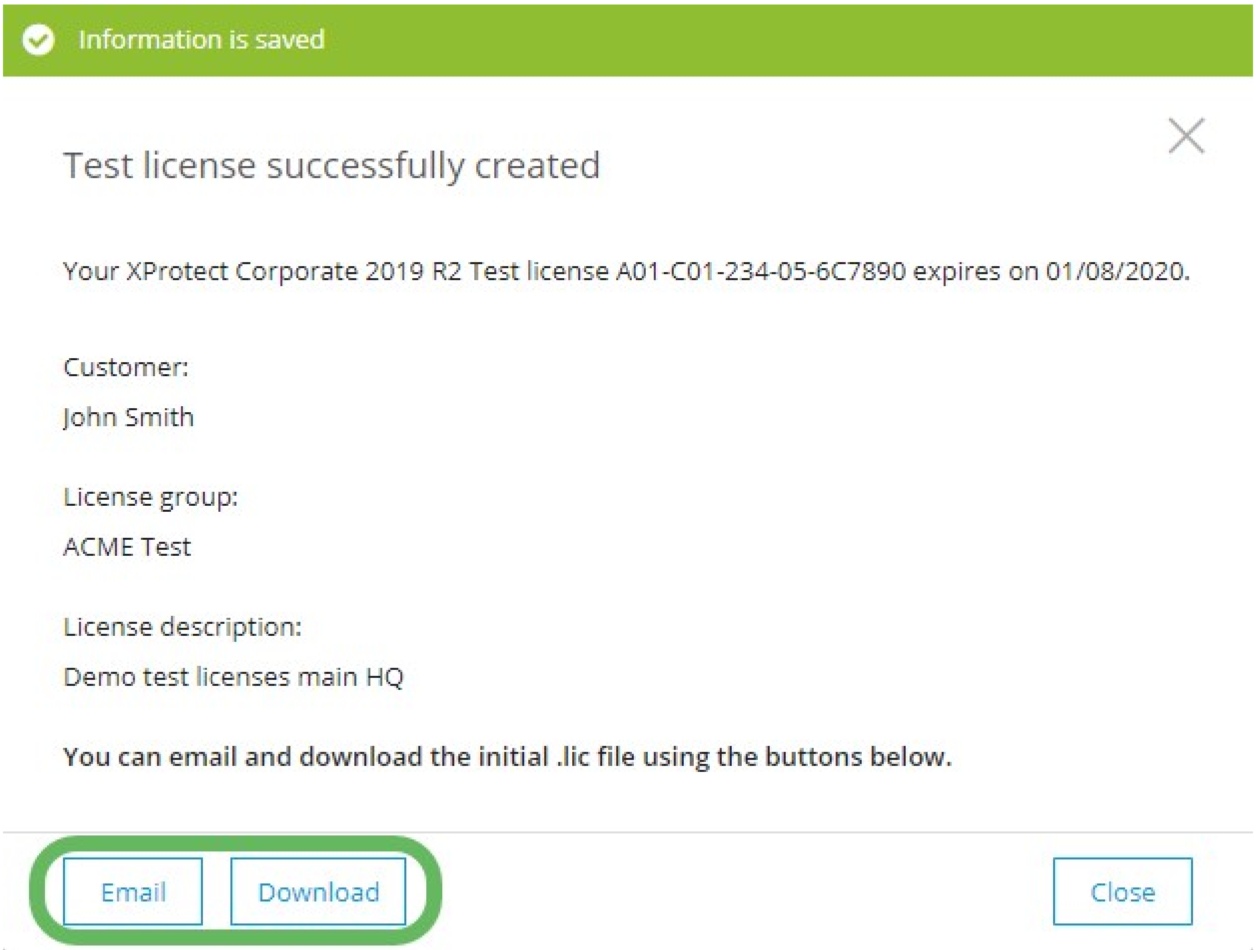
4. In the **Create Test License** window, select the **Product** and **Version** of the test license that you would like to create and select **Next**.
5. Select an existing **Customer** to associate the test license with or add a new customer by selecting **Add customer**.
6. Optional: Associate the test license with a license group or add a license description from the **License group** and **License description** fields, respectively.

7. Turn on **Expiration reminder** to receive email reminders 100 days and 20 days before the test license expires.

8. Select **Next** to confirm test license creation.

After completion, the test license confirmation window shows your newly activated test license and the associated product, version number, customer, and expiration date.

To use this test license on a new VMS installation, select **Email** or **Download** in the test license confirmation window.



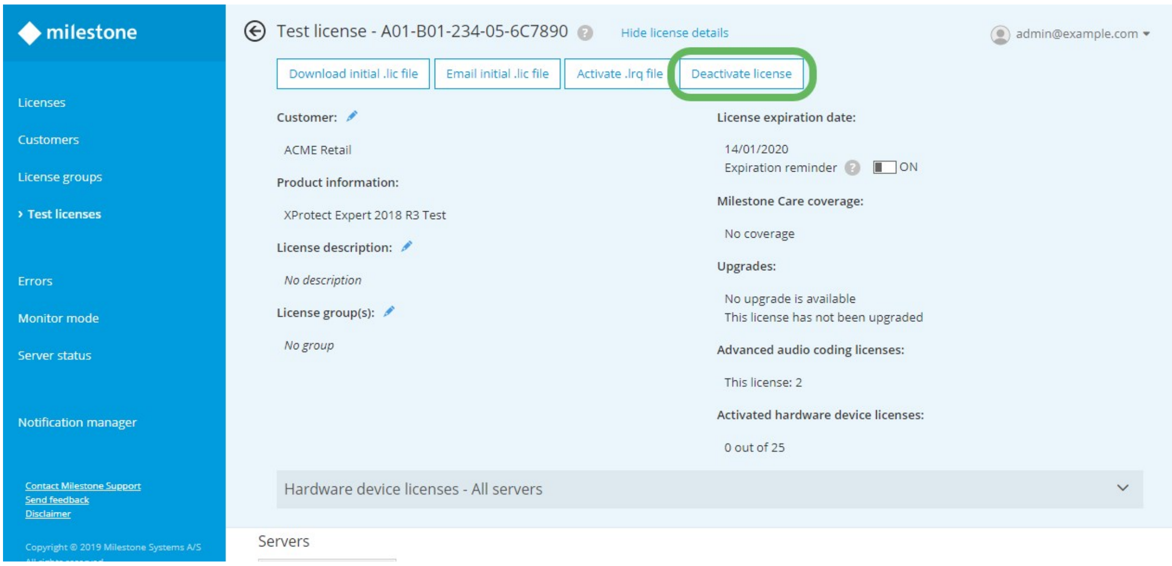
Deactivate a test license

By default, a test license is active for 365 days after it is created. You might want to deactivate a test license earlier if, for example:

- The demonstration or training that you used the license for ended
- You want to increase your pool of licenses that are available to create

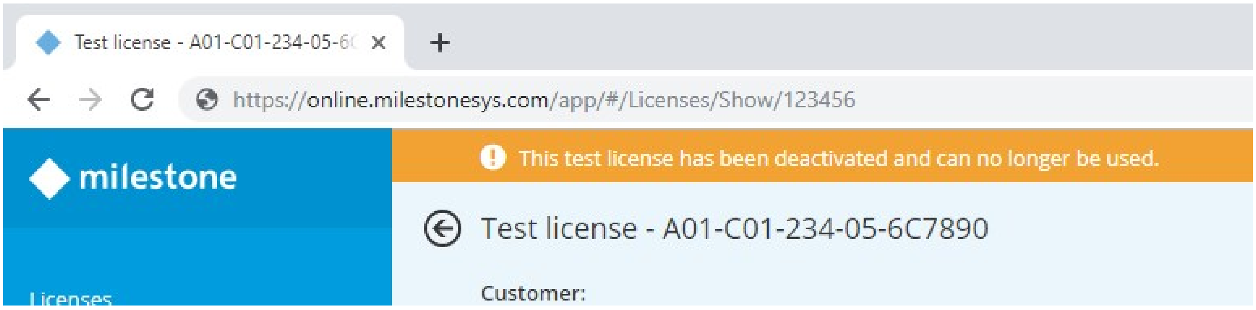
To deactivate a test license:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. In the main menu, select **Test licenses**.
3. Double-click to select the test license that you want to deactivate.
4. On the license details page, select **Deactivate license**.



5. In the **Are you sure that you want to deactivate this test license?** window, select **Deactivate**.

An orange notification bar informs you that the license is no longer active, and your pool of **Available** test licenses increases.



The license details page continues to show the deactivated license information for reference.

Errors page

Errors

You can configure your VMS system to connect to Milestone Customer Dashboard so that the VMS system can report its system errors to Milestone Customer Dashboard. The errors from the individual VMS systems are then displayed on the **Errors** page on Milestone Customer Dashboard.

The **Errors** page is for information purposes only. You cannot correct any errors from Milestone Customer Dashboard. Instead, you must connect to or open the relevant VMS system and solve the issue there.

> You can only see errors from VMS installations that are set up to report errors to Milestone Customer Dashboard. See Set up error reports on page 73

Milestone Customer Dashboard refreshes the errors list every 20 minutes, based on the following criteria:

- If the VMS installation reports a new error, the error is automatically added to the list
- If the VMS installation reports a previously reported error, the error remains on the list
- If the VMS installation stops reporting an error, the error is removed from the list.

By default, the latest errors show at the top of the list, and the order is not affected by status changes. You can select the relevant column header to sort the information alphabetically, based on that column.

Send VMS error reports to Milestone Customer Dashboard

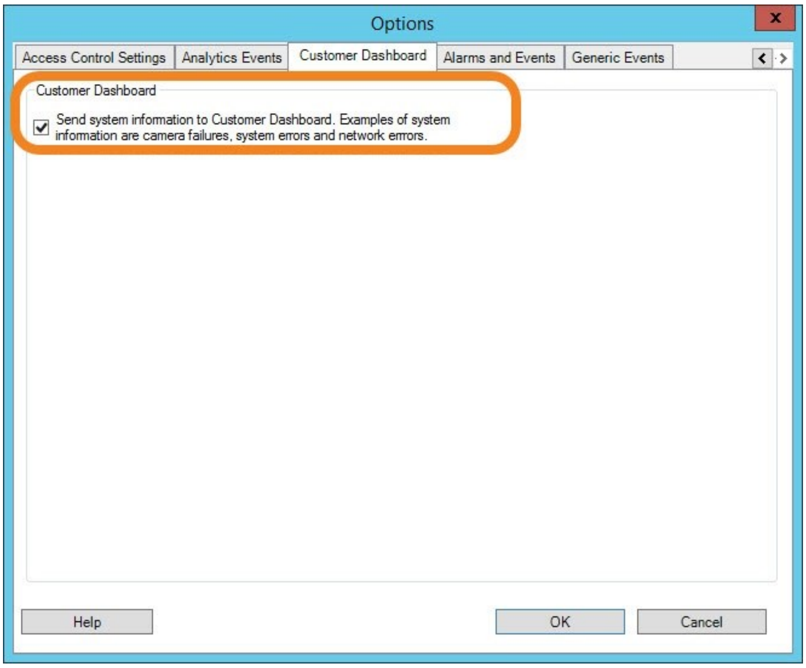
There is no default connection between your XProtect VMS and Milestone Customer Dashboard. You must set up this connection yourself. When you establish the connection, the XProtect VMS begins sending error reports to Milestone Customer Dashboard.

Requirements:

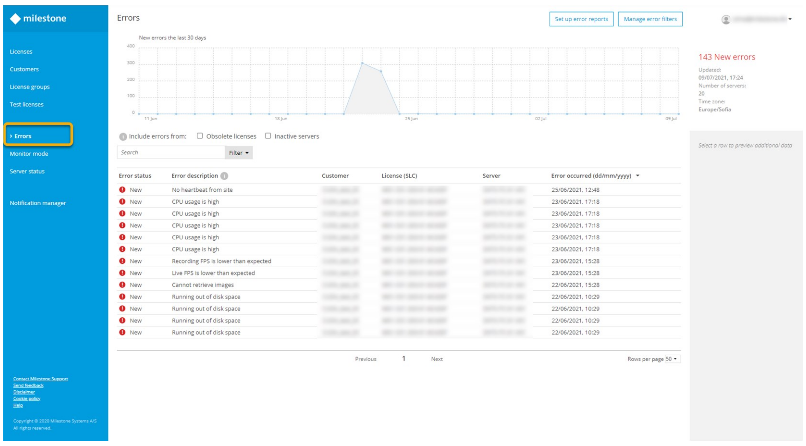
- An active Milestone Care Plus (or higher) subscription
- An active Milestone software license

To send system information to Milestone Customer Dashboard, you must configure your VMS the following way:

1. Open XProtect Management Client log in to the system.
2. Go to **Tools** -> **Options**, select the **Customer Dashboard** page, then select **Send system information to Customer Dashboard**. Click **OK**.



The XProtect VMS system will begin sending error information to Milestone Customer Dashboard. You can view the error information from the **Errors** page.



If the customer has a distributed system, each site must be configured separately.

View errors details

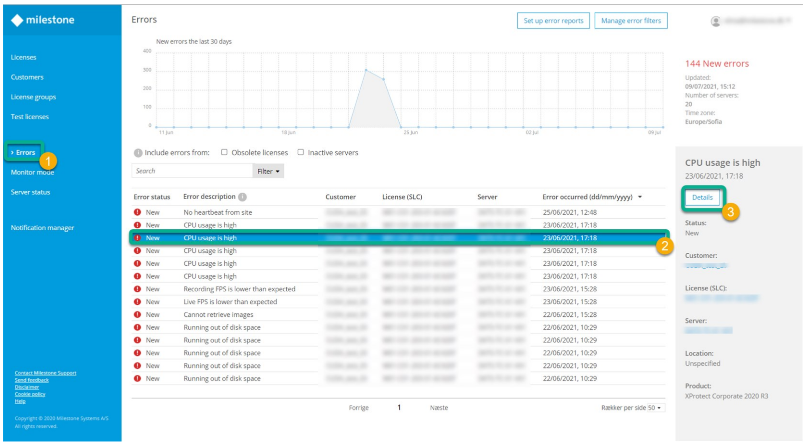
Milestone Customer Dashboard collects all errors that your VMS installations report. You can monitor these errors and take action when necessary.

> Milestone Customer Dashboard only receives messages from your VMS installations if you enable the individual VMS to send the information manually. See Send VMS error reports to Milestone Customer Dashboard on page 40.

To view a particular error:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. Select the **Errors** page ❶.
3. Find the error that you want to see details about ❷. For help locating errors, see Search for errors on page 46.
4. Select the relevant error and click **Details** in the preview pane on the right-hand side ❸.

> To select the relevant error, you can also double-click the error row.



On the new page, you can find more detailed information about the error or View related errors on page 47

Errors list

The errors list shows all errors for active licenses that have sent a least one heartbeat to Milestone Customer Dashboard within the last 30 days. Find the most recent errors at the top of the list. If you want to display more errors, you have the option to:

- Include errors from upgraded licenses, by selecting the **Obsolete licenses** check box
- Include errors from servers that have not sent a heartbeat to Milestone Customer Dashboard within the last 30 days, by selecting the **Inactive servers** check box.

> ⚠ If you want to see the filtered errors, select the relevant status from the **Filter** (see Search for errors on page 46).

The errors table consists of the following columns:

Field	Description	Searchable
Error status	All errors logged into Milestone Customer Dashboard obtain a **New** status. You can manually change the status to **Being fixed.** Changing the error status does not affect the list order for the errors.	Yes, from the **Filter**
Error description	A short description of the error. To learn more about the different errors, see Error descriptions (properties) on page 48.	Yes, from the **Filter**
Customer	The name of the customer that is associated with this license. See Specify a customer name for a license on page 13	Yes
License (SLC)	The license code that is associated with the server on which the error occurred.	Yes
Server	The name of the server that is associated with the SLC and where the error occurred.	Yes
Error occurred	Date and time when the error occurred.	No

To see the details of a specific error, double-click on the error or select **Details**. A new page with these details is displayed.

The fields below relate to each, separate error:

Field	Description
Error type	Each error description belongs to one of the following categories: • **Camera failure** • **Disk failure** • **System** • **Unknown error type**
Error value	The name of the VMS server or the device that has reported the error.
Error description	A short description of the error. To learn more about the different errors, see Error descriptions (properties) on page 48.
Error occurred	The date and time when the error occurred.
Server	The host name of the server that is associated with the SLC.
Location	The location of the server on which the error occurred.
Status	All new errors are displayed with a **New** status. You can manually select the status: • **New** - when you stop working on a specific error • **Being fixed** - when you are working on a specific error.
Related errors for this server	Other errors that occurred on this server. Here, you can see all errors reported on the server. Click on the **Ongoing errors** page to see the errors with **New** or **Being fixed** status, or go to the **Closed errors** page to view the archived errors.

Change the status of an error

Milestone Customer Dashboard checks the reported errors every 30 minutes and automatically removes the resolved errors from the main list. All errors arrive with status **New**. If you are working on a specific error, you can manually change its status to **Being fixed**.

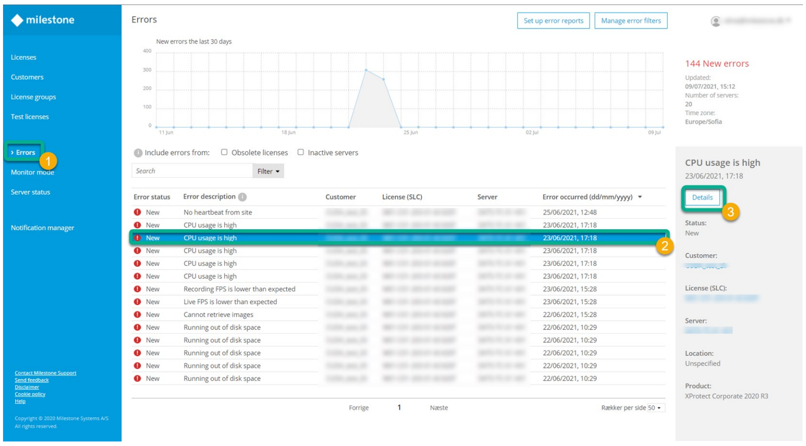
To change the status of an error:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. Select the **Errors** page ❶.
3. Find the error that you want to see details about ❷.

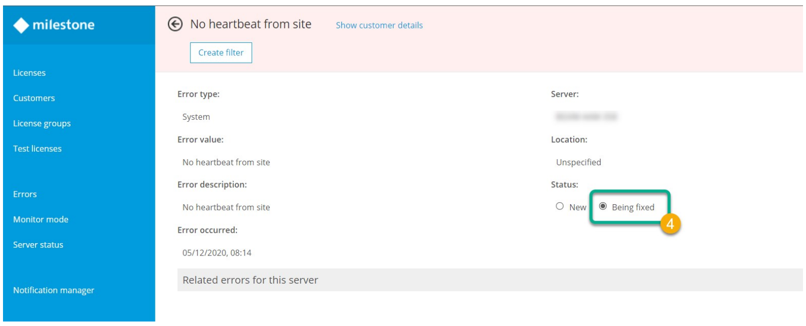
   > For help locating errors, see Search for errors on page 46.

4. Select the relevant error and click **Details** in the preview pane on the right-hand side ❸.

   > To select the relevant error, you can also double-click the error row.



5. Change the status to **Being fixed** ❹.



If you need to, you can go back to the **Errors** list and change another error's status.

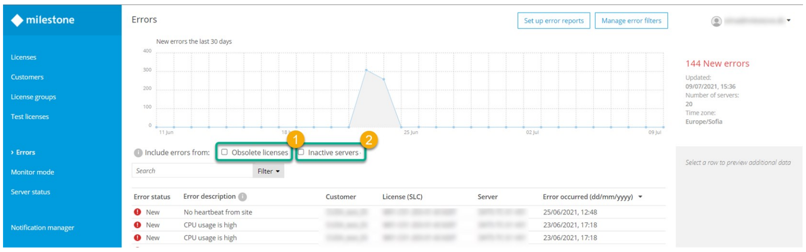
Search for errors

You can search for errors by:

- Error status
- Error description
- Customer
- License (SLC)
- Server

By default, only errors from active licenses with a heartbeat within the last 30 days are displayed. If you want to see more errors, you have the option to:

- Include errors from upgraded licenses by selecting **Obsolete licenses** check box ❶
- Include errors from servers without a heartbeat within the last 30 days by selecting **Inactive servers** check box ❷.

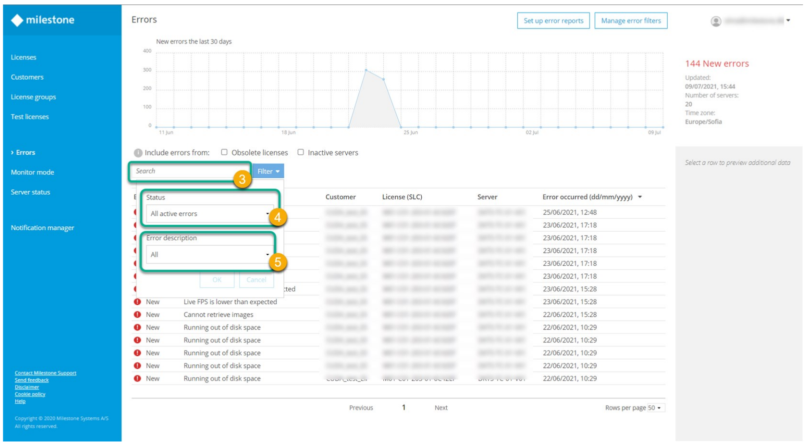


Filtered errors are displayed only when **Filtered** status is selected from the **Filter**. If you want to learn more about error filters, see Error filters on page 57.

To look for specific errors:

1. In Milestone Customer Dashboard, navigate to the **Errors** page.
2. In the **Search** field, search for a specific license, customer, or server ❸.
3. (Optional) Use the **Filter** to search for a specific **Status** ❹. You can select:
    - All active errors - Errors with status **New** and **Being fixed** that are not hidden by a custom filter
    - New - Errors that require attention
    - Being fixed - Errors that are currently under investigation
    - Filtered errors - Errors that are hidden from the main view by a custom filter

4. (Optional) Use the **Filter** to search for a specific **Error description** 5. To see the complete list, go to Error descriptions (properties) on page 48.



View related errors

The **Related errors for this server** table in Milestone Customer Dashboard keeps track of all ongoing and closed errors on the server and on the devices that are connected to that server (cameras, microphones, and other hardware devices). The table consists of two tabs:

- **Ongoing errors** - errors with status **New** or **Being fixed**. Those errors are shown in the main list unless filtered.
- **Closed errors** - errors that are no longer reported by the server and are not shown in the **Errors** list.

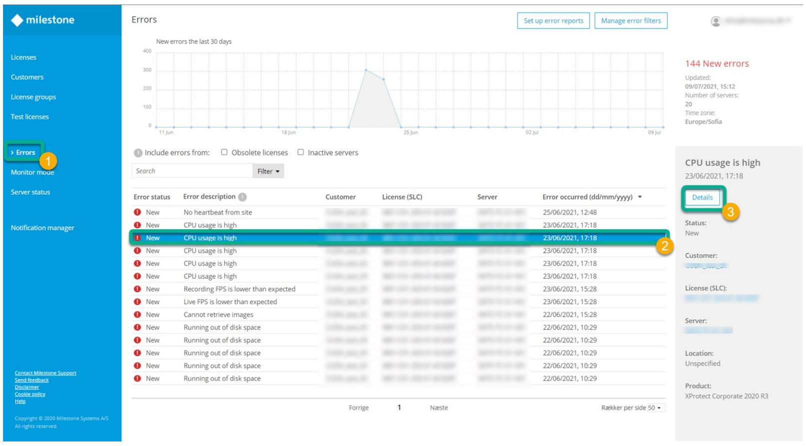
To change the status of an error:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. Select the **Errors** page 1.
3. Find the error that you want to see details about 2.

> For help locating errors, see Search for errors on page 46.

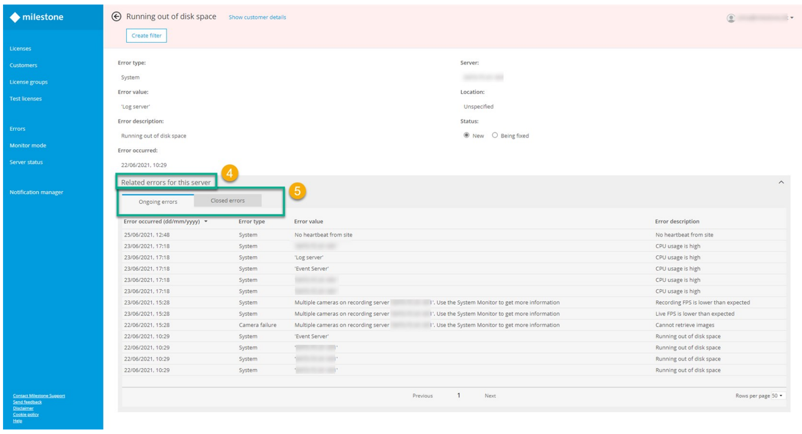
4. Select the relevant error and click **Details** in the preview pane on the right-hand side ❸.

> ✔ To select the relevant error, you can also double-click the error row.



5. On the error page, scroll down to **Related errors** for this server and click on the field to expand it ❹.

6. Click on **Ongoing** and **Closed errors** to see all server errors ❺.



Error descriptions (properties)

Depending on the XProtect VMS product that you are using, the table of error descriptions that you see in Milestone Customer Dashboard look slightly different.

XProtect VMS products

The list of error descriptions applies to the following products:

- XProtect Corporate
- XProtect Expert
- XProtect Professional+

- XProtect Express+
- Milestone Husky M500A
- Milestone Husky M550A
- Milestone Husky X series devices
- Milestone Husky IVO series devices

Error description	Solution	Error level
Cannot retrieve images	Make sure that the camera is properly connected to the network and is working. Verify that live video is available in the Management Client and XProtect Smart Client.	Device
Live FPS is lower than expected	Check that the camera is running correctly and is not overloaded by other systems that also connect to it. Alternatively, check that the network connection to the camera has enough bandwidth and is stable.	System
Recording FPS is lower than expected	Check that the camera is running correctly and is not overloaded by other systems that also connect to it. Alternatively, check that the network connection to the camera has enough bandwidth and is stable.	System
Used space is higher than expected	The camera uses more disk space than expected. A full disk may be a result of: • More activity and longer periods of activity than expected. • Too sensitive motion detection settings. • Too high video quality, bandwidth or framerate. Verify that the settings mentioned above are configured correctly. Also, verify that storage calculations are correct and that the retention time has been set correctly. Consider increasing available disk space.	System
Feed overflow (not all data recorded)	The disk used for recordings cannot keep up with the number of data it is receiving. To solve this issue, do one or more of the following actions:	System

Error description	Solution	Error level
	• Reduce the number of data written to the disk by lowering, for example, resolution, frame rate, image quality. Note that if you lower any of these recording settings, you may degrade the recording quality. • Add extra drives to share the load or install faster disks/controllers to improve the storage system's performance. • Move cameras/hardware devices to other recording servers if you have any recording server with free resources.	
Running out of disk space	The storage with the media database is running out of disk space. Free up some disk space or move the media database to another disk that has more space available. Go to the Management Client and change the Recording paths for the devices to solve this issue.	System
Archive unavailable	Check if the archive is unavailable due to a lost connection to a network drive or local drive. Then restore the connection.	System
Database storage unavailable	Check if the database is unavailable due to a lost connection to a network drive or local drive. Then restore the connection.	System
Failover started	Check why the original recording server failed and correct any issues that caused the failure.	System
CPU usage is high	Check all processes running on the server and stop any unnecessary activity if you can. Alternatively, upgrade the server with a more powerful CPU. If the issue with CPU usage is taking place on a recording server, use the move hardware functionality to spread the load among recording servers.	System
Memory usage is high	Check the server's memory usage and see if you can stop any unnecessary activity or if you can add any additional memory to the server. Alternatively, use the move hardware function to spread the load among recording servers.	System

Error description	Solution	Error level
Service unavailable	Check why the relevant service has become unavailable and correct any issues that prevent the service from running correctly. Restart the service.	System
Retention time	More video is recorded than expected and the system predicts that it soon runs out of disk space and cannot record all video you have set the system up to record. A full disk may be a result of: • More activity and longer periods with activity than expected. • Too sensitive motion detection settings. • Too high video quality, bandwidth or framerate. Verify that the settings mentioned above are configured correctly. Consider increasing the available disk space.	System
Archiving not finished	Archiving has started before the previous archiving completed. This issue usually occurs when disks are too slow to finish archiving in time. If you are archiving to a network share or a Network-Attached Storage (NAS), the issue may also occur if the network is unstable or if it does not have enough bandwidth available.	System
Database disk full - auto archiving	The disk used to store the database has become full. As a result, the system has started to move existing recordings to the next archive. A full disk may be a result of: • More activity and longer periods with activity than expected. • Too sensitive motion detection settings. • Too high video quality, bandwidth or framerate. Verify that the settings mentioned above are configured correctly. Consider increasing the available disk space.	System
Database disk full - deleting	The disk used to store the database has become full. As a result, the system has started to delete recordings to free up some space for new recordings. A full disk may be a result of: • More activity and longer periods with activity than expected.	System

Error description	Solution	Error level
	• Too sensitive motion detection settings. • Too high video quality, bandwidth or framerate. Verify that the settings mentioned above are configured correctly. Consider increasing the available disk space.	
Database full - auto archiving	The disk used to store the database has become full according to your defined limits. As a result, the system is automatically moving existing recordings to the next archive. A full disk may be a result of: • More activity and longer periods with activity than expected. • Too sensitive motion detection settings. • Too high video quality, bandwidth or framerate. Verify that the settings mentioned above are configured correctly. Consider increasing the available disk space.	System
Database repair	The system has started repairing the database because the database may have become corrupt. A database usually becomes corrupt if the recording server is shut down unexpectedly.	System
Automatic license activation failed	The system could not automatically activate the license. Verify that the user name and password for the automatic license activation are correct and that the management server can access the URL for the Online Activation service.	System
Rule-generated alert	Your system has been configured to send a message triggered from a rule. See the alarm description for more information.	System
No heartbeat from site	Milestone Customer Dashboard is not receiving any heartbeats from your surveillance system. There could be one or more reasons for this situation: 1. Your system has no access to the internet. Solution: Give your system access to the internet.	System

Error description	Solution	Error level
	2. You have disabled the **Send information to the Customer Dashboard** option. Solution: Go to the Options menu in the Management Application and enable this option. 3. Your recording server is not running. Solution: Make sure that your recording server is running on the tray icon and verify that you can see live video in XProtect Smart Client.	

XProtect Professional VMS products

This list of error descriptions applies to the following products:

- XProtect Essential
- XProtect Express
- XProtect Professional
- XProtect Enterprise
- Milestone Husky M20
- Milestone Husky M30
- Milestone Husky M50

Error description	Solution	Error level
Failed to add to database - General	Make sure that the media database disk is connected and accessible, and that the system has permission to write to the disk.	Device
Failed to add to database - Specific	Make sure that the media database disk is connected and accessible, and that the system has permission to write to the disk.	Device

Error description	Solution	Error level
Cannot retrieve serial number	Make sure that the camera is correctly connected to the network and working. Verify that live video is available in the Management Application and in XProtect Smart Client.	Device
Serial number is not correct	A camera on the system has been replaced with another camera of the same type/model and with the same IP address. To fix this issue, remember to use the **Replace Hardware** wizard after replacing the camera.	Device
Maximum number of cameras allowed to run exceeded	The system has tried to start more cameras than your license allows you to. Make sure that you have the right number of camera licenses to add the number of devices you want to use.	System
Camera failed to provide an image	Make sure that the camera is properly connected to the network and is working. Verify that live video is available in the Management Application and in XProtect Smart Client.	Device
Image failure. Trying to reconnect	Make sure that the camera is properly connected to the network and is working. Verify that live video is available in the Management Application and in XProtect Smart Client.	Device
Archiving failed to run	Check the available disk space. If there is still available space on the disk, restart the server.	System
Database connection error	Make sure that the media database disk is connected and accessible, and that the system has permission to write to the disk.	Device
Running out of disk	The storage with the media database is running out of disk space. Free up some disk space or move the media database to another disk with more	System

Error description	Solution	Error level
space	space available. Go to the Management Application and change the Recording paths for the devices to solve this issue.	
Error deleting archive	Make sure that the disk where your system saves its archives is connected and accessible, and that the system has full permission to the disk.	System
Cannot delete file	One or more files in your media database or archives are locked and you cannot delete the files. Make sure that the disks on which your media database and archives are located is connected and accessible and that the system has full permission to the disk.	System
Target path invalid	Make sure that the disk where your system saves its archives is connected and accessible, and that the system has full permission to the disk.	System
Failed to rename archive on same volume	The disk you are trying to archive to is either disconnected or inaccessible. Make sure that the disk with archives is connected and accessible, and that the system has full permission to the disk.	System
Failed to copy archive to different volume	The system cannot rename one or more archives. Make sure that the disk with archives is connected and accessible, and that the system has full permission to the disk. Also make sure that no files or folders in the archives are open, locked or in use by other processes than the surveillance system.	System
Error in processing an archive	The system cannot copy one or more archives. Make sure that the disk with archives is connected and accessible, and that the system has full permission to the disk. Also make sure that no files or folders in the archives are open, locked or in use by other processes than the VMS.	System

Error description	Solution	Error level
Archive file move error (s)	The system cannot process one or more archives. Make sure that the disk with archives is connected and accessible, and that the system has full permission to the disk. Also make sure that no files or folders in the archives are open, locked or in use by other processes than the VMS.	System
Recording server has restarted after a crash	One or more files inside the media database are locked or inaccessible. Make sure that no files or folders inside the media database are open, locked or in use by other processes than the VMS.	System

Errors specific to Milestone Customer Dashboard

Error description	Solution	Error level
No heartbeat from site	Milestone Customer Dashboard is not receiving any heartbeats from your surveillance system. There could be one or more reasons for this situation: 1. Your system has no access to the internet. Solution: Give your system access to the internet. 2. You have disabled the **Send information to the Customer Dashboard** option. Solution: Go to the **Options** menu in the Management Application and enable this option. 3. Your recording server is not running. Solution: From the tray icon, make sure your that your recording server is running and verify that you can view live video in XProtect Smart Client.	System

Error filters

Milestone Customer Dashboard displays all errors that are reported by the VMS installations. They remain on the list until they are fixed. With error filters, any errors that match the attributes of the filter are still logged, but they:

- Are not displayed on the **Errors** page
- Do not trigger error notifications and are not included in error notification emails
- Set the status of the server to **Filtered error** instead of **Error detected** on the **Server status** page.

You can filter errors:

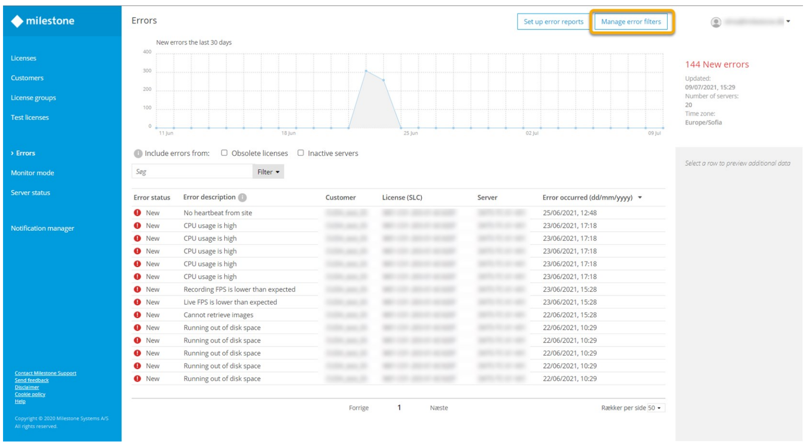
- By error description
- By server name
- By minimum period that an error must exist, before it appears in the errors list
- For a specified period of time.

You can see all filtered errors by selecting **Filtered** status in the **Filter** (see Search for errors on page 46).

Create error filters for a customer

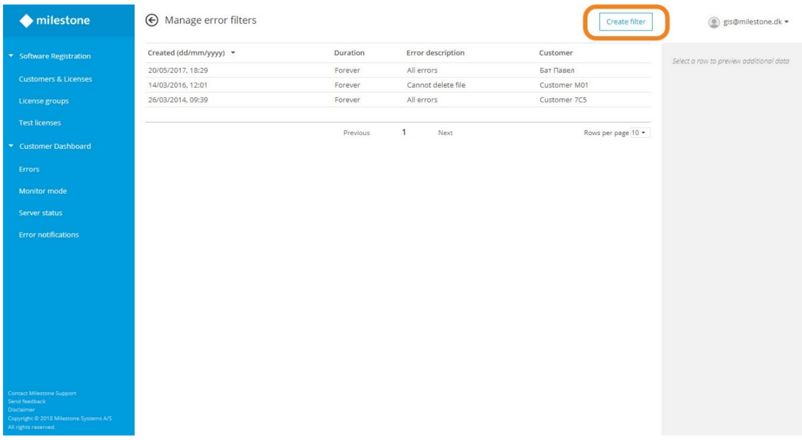
For each customer, you can specify which errors are displayed in the **Errors** page.

1. Select **Errors** in the main menu, then select **Manage error filters**.



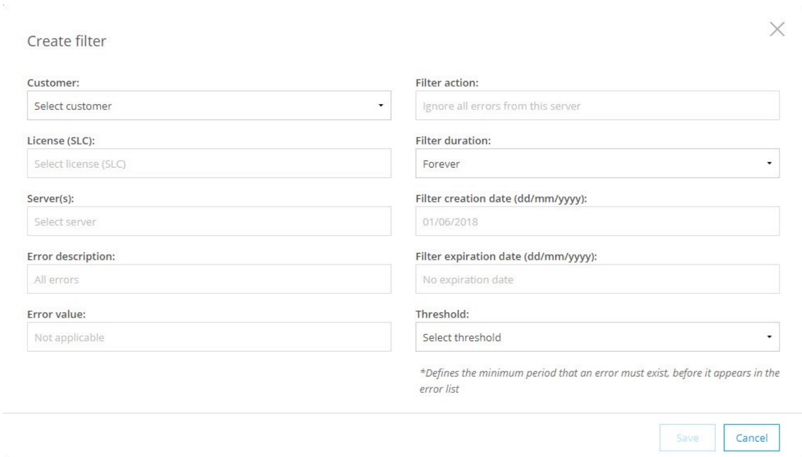
The created error filters for your customers will be displayed on the **Manage error filters** screen.

2. Select **Create filter**.



3. In the **Create filter** window, fill out all applicable properties for the selected filter. Start from the upper-left field (**Customer**) and narrow down your filter criteria by selecting details from more fields. See Error filters (properties) on page 62.

> As a minimum, you must specify **Customer**, **License** and **Server name** to save a filter.



4. Click **Save**.

The created error filter is active immediately and will display at the top of the **Manage error filters** page.

Any errors that match the attributes of the filter are still logged, but they:

- Are not displayed on the **Errors** page
- Do not trigger error notifications and are not included in error notification emails
- Set the status of the server to **Filtered error** instead of **Error detected** on the server details page.

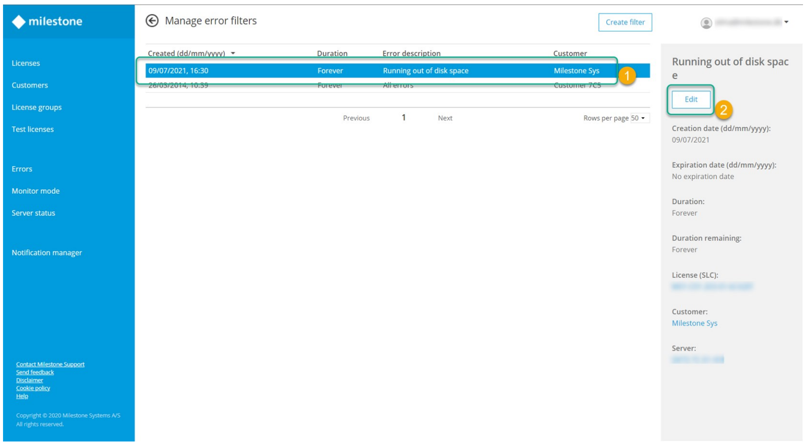
You can see all filtered errors by selecting **Filter > Filtered Errors** from the **Errors** page.

Edit error filters

With error filters, you can customize the errors you see in the **Errors** page. You can modify the existing filters, depending on your current needs.

To edit a filter:

1. In the navigation pane, select **Errors** and then click **Manage error filters**.
2. Select an existing filter ❶ and click **Edit** ❷.



3. In the **Edit filter** window, you can change some of the properties. After applying your changes, click **Save**.

Related topics:

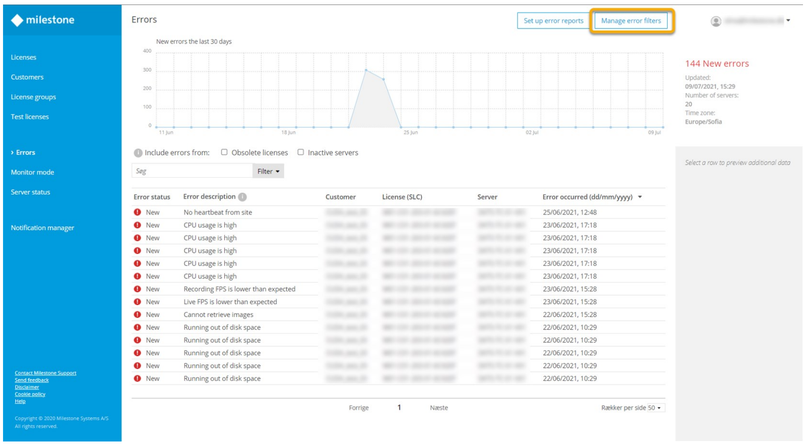
- Error filters (properties) on page 62

Delete error filters

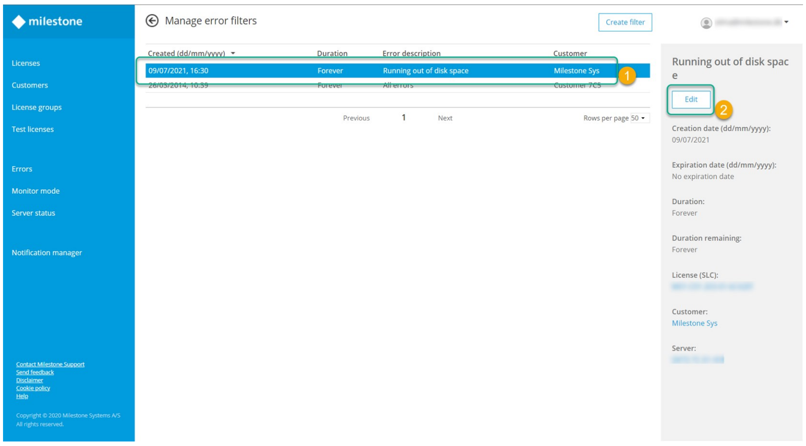
With error filters, you can customize the errors you see in the **Errors** page. If you no longer need to filter specific errors, you can delete the error filter.

To delete a filter:

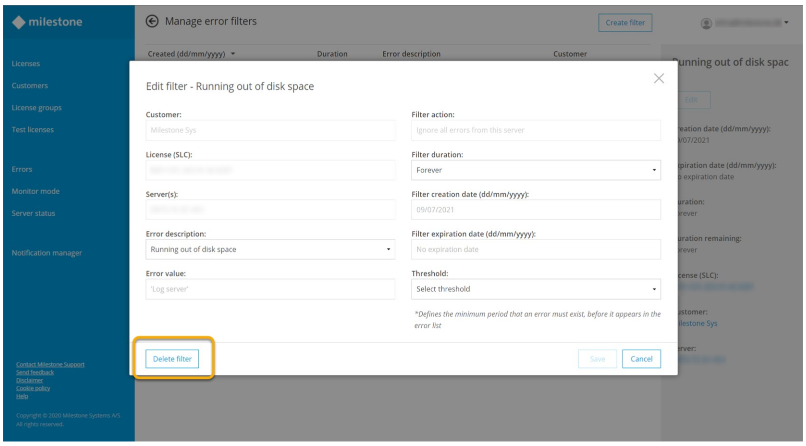
1. In the navigation pane, select **Errors**, then click **Manage error filters**.



2. Select an existing filter ❶ and click **Edit** ❷.



3. Select **Delete filter**.



The error filter is removed and cannot be restored.

Error filters (properties)

With error filters, any errors that match the attributes of the filter are still logged, but they:

- Are not displayed on the Errors page
- Do not trigger error notifications and are not included in error notification emails
- Set the status of the server to Filtered error instead of Error detected on the server details page.

You can filter errors:

- By error description
- By server name
- By a minimum period that an error must exist, before it appears in the errors list
- For a specified period of time.

As a minimum, you must specify **Customer**, **License** and **Server name** to save a filter.

Field	Description
Customer	The name of the customer that is associated with this license (see Specify a customer name for a license on page 13). Select the customer for which you want to filter errors.
License (SLC)	License code associated with the server on which the error occurred. Select the SLC. You can create multiple error filters per SLC, but you cannot include SLCs in one error filter.
Server(s)	The server name that is associated with the SLC where the error occurred. Select a server that runs under this SLC. If you want the same error filter to apply for multiple servers, you must create additional error filters with the same properties.
Error description	Select one error from the list to filter on, or all.
Error value	The error value is related to the error description. It can contain information regarding the

Field	Description
	server or devices on which an error occurred. The field is read-only. Values are generated only when you create an error filter from an error.
Filter action	Select the filter level (device or system) and the error type. You can: • Ignore a specific error from a device • Ignore a specific error for the entire server • Ignore all errors from the device • Ignore all errors from the server • Choose to not monitor the system. The list of available options depends on the error level, see Error descriptions (properties) on page 48. You can modify the selection only when you are creating an error filter from an error.
Filter duration	Specify a limited duration from the predefined values or select **Forever** to set the filter without an expiration date.
Filter creation date	The creation date is automatically set to today's date.
Filter expiration date	The expiration date is automatically set, depending on your selection in **Filter duration**.
Threshold	Specify for how long an error must exist before it is considered as an error by Milestone Customer Dashboard.

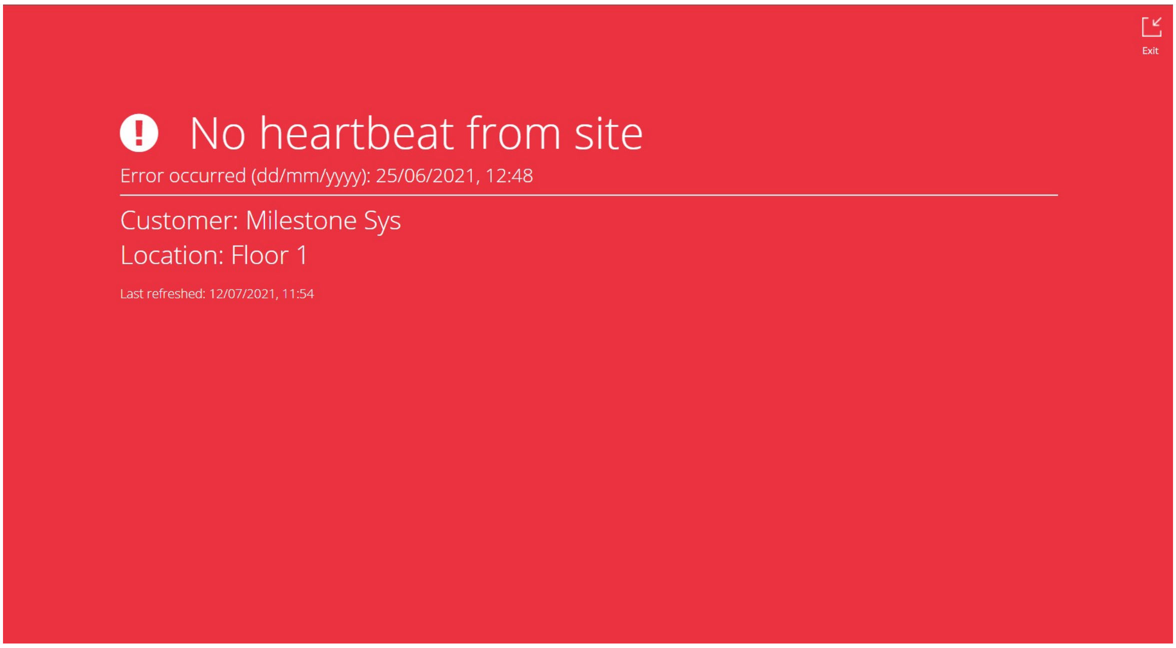
Monitor mode page

Monitor the health of your customers' systems

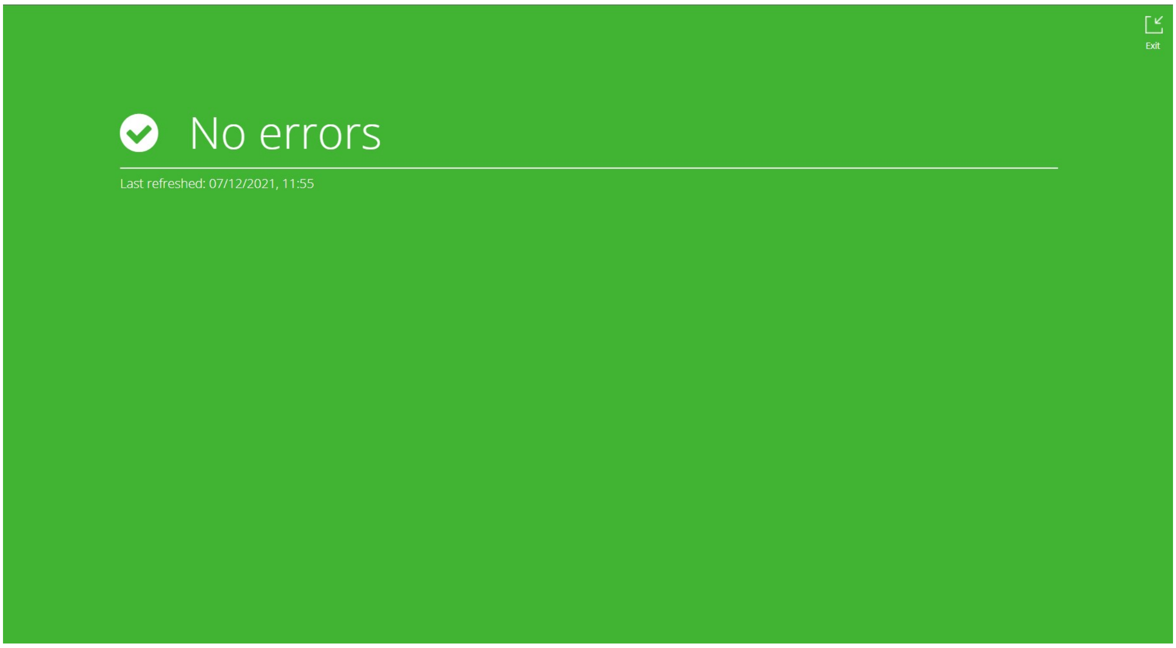
Monitor mode displays, in full-screen, the latest error notification that Milestone Customer Dashboard received on the **Errors** page. This provides an at-a-glance view of the errors that have been reported by your connected servers.

From the main menu, you can open **Monitor mode**. When page opens, you are shown the latest status of the servers, that are reporting errors to Milestone Customer Dashboard.

- If an error is detected, the page is red. It informs you of the type of error, the date and time when the error occurred, **Customer** name, and **Location**. Example:



- In contrast, if no errors are detected, the page is green. Example:



Server status page

Server status

The **Server status** page provides information on whether your servers are able to send information to Milestone Customer Dashboard, and if they can, whether there are errors that your servers are reporting.

In order for a server to report its status information to Milestone Customer Dashboard, it must meet all of the following criteria:

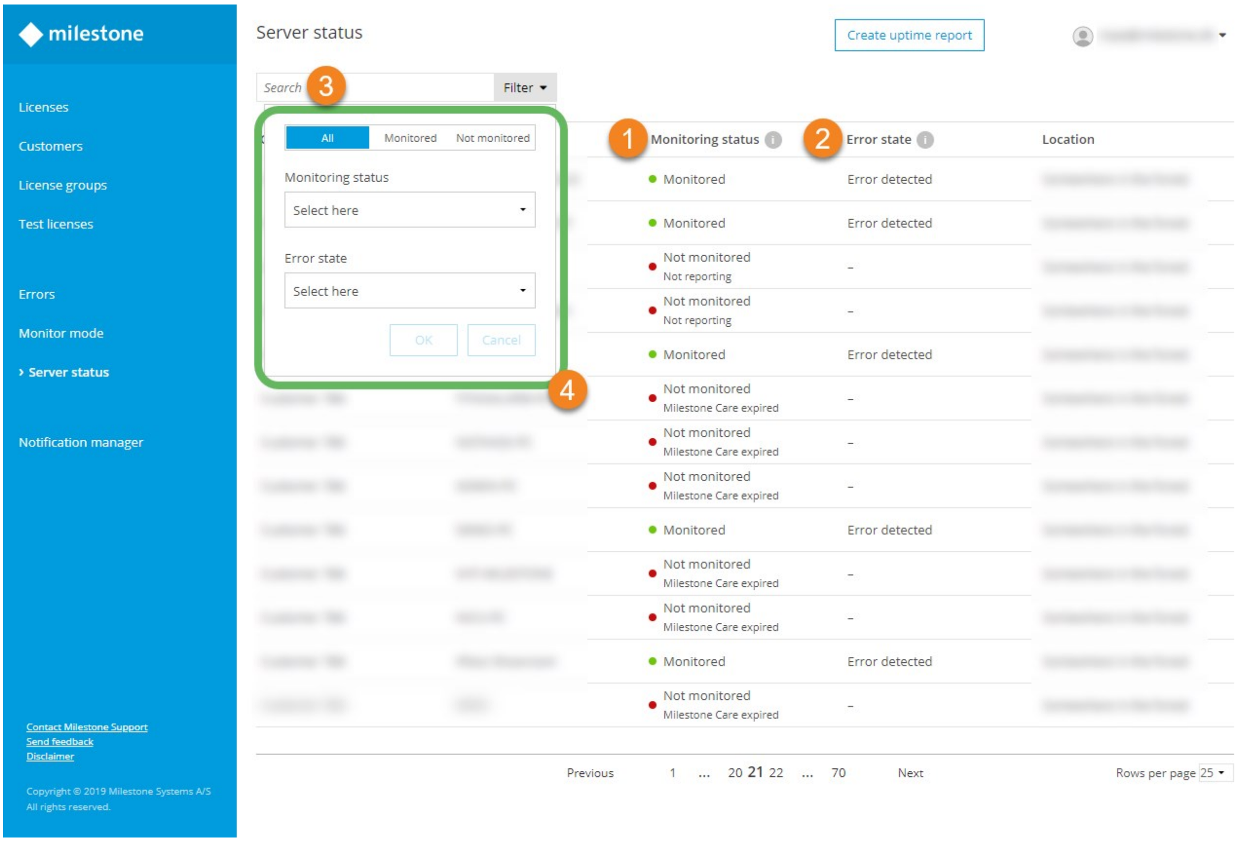
- Run an XProtect VMS product version 2014 R1 or later
- Be an online XProtect VMS installation able to connect to the internet
- Have an active Milestone Care Plus or higher subscription
- Do not have an active **Ignore all errors from this server** error filter

> If the name of the computer that hosts the Management Server has been changed, the name change will not appear until you reactivate your licenses.

Servers that meet all these criteria will have a **Monitoring status** 1 of **Monitored**, and will report an **Error state** 2 to **Milestone Customer Dashboard**.

Search 3 for custom results using the data from any of the columns.

Filter 4 results by a specific **Monitoring status** or **Error state**.



Related topics:

- Monitoring status on page 67
- Error state on page 68

Monitoring status

The **Monitoring status** column lists the ability of server to report to Milestone Customer Dashboard. Servers can have one of the following five Monitoring statuses:

Monitoring Status	Description
Monitored	The server is online and reports status information to Milestone Customer Dashboard.
Reporting not supported	The server hosts a Milestone XProtect product that does not support reporting to Milestone Customer Dashboard. This applies mainly to legacy versions of Milestone products.

Not reporting	The server has been activated but does not report status information to Milestone Customer Dashboard. Offline VMS installations have a **Not reporting** status.
Milestone Care expired	The Milestone Care™ subscription for the license related to the server has expired and must be renewed in order to be monitored by Milestone Customer Dashboard.
All errors filtered	The server is online and reports status information to Milestone Customer Dashboard, but any errors are ignored by an active **Ignore all errors from this server error** filter.

Error state

The **Error state** column lists the current error state of a server that is monitored by Milestone Customer Dashboard. Servers can have one of the following five error states:

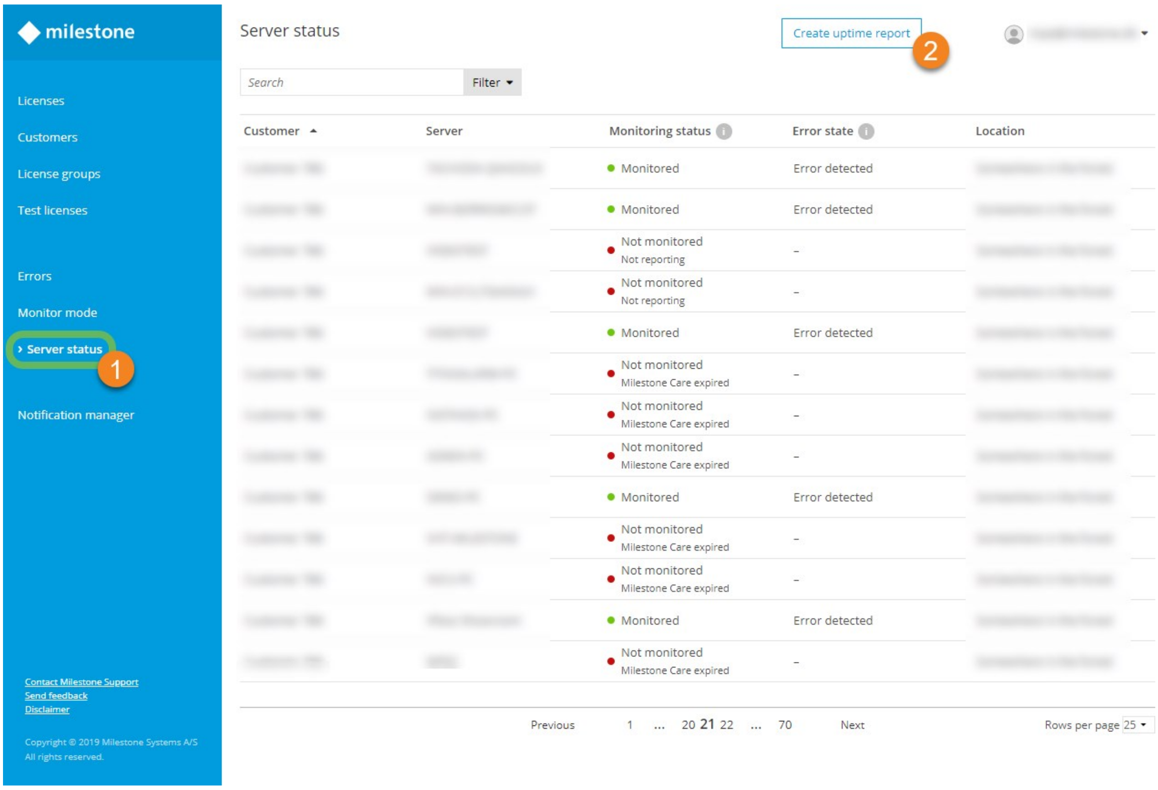
> To have a valid error state, the server must have a **Monitoring status** of **Monitored**.

Error state	Description
–	The server does not report status information to Milestone Customer Dashboard. For more information, see the corresponding **Monitoring status** of the server.
No errors	The server has no errors.
Filtered error	The server has an error that is being ignored by active error filters.
Error detected	The server has an error that requires attention.
Error being fixed	The most recent server error has been marked as **Being fixed** on the error **Details** page.

Create system uptime reports

You can use system uptime reports to document the stability of an installation or to troubleshoot a system. To create a system uptime report:

1. In the main menu, select **Server status** ❶, and then select **Create uptime report** ❷.



2. In the **Create uptime report** window, select a filter for the report ❸:

   - **Customer** - The report contains information about all servers that are associated with the selected customers, independent of licenses
   - **License** - The report contains information about all servers, categorized by licenses
   - **Location** - The report contains information about all servers at specific locations independent of customers and licenses
   - **Server** - The report contains information about specific servers independent of customers, licenses, or locations

3. Use the search field to refine the list of items to select from, and select the items that you want to include in the report ❹.

4. Specify a start date ❺ and end date ❻ for the report.

5. Select **Create** ❼ to download the report as a PDF file.

Set the location of different servers in a distributed installation

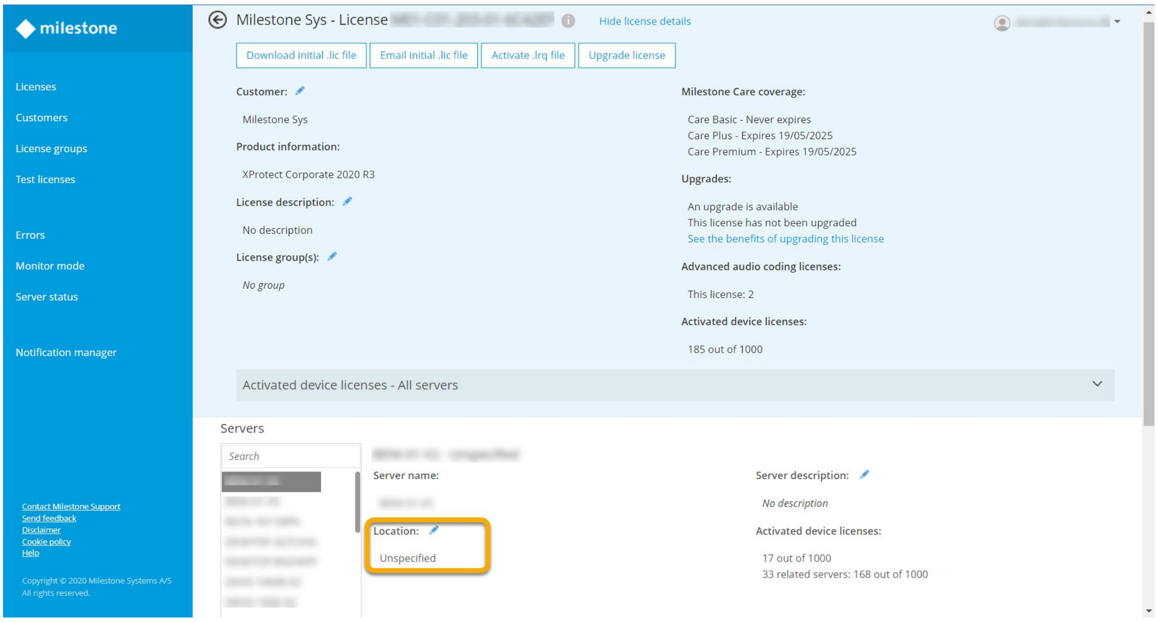
To facilitate an easier identification of servers, for example, in a distributed system, you can add the location. You can use this value to:

- See the location of the servers associated with a license in **License** page
- See the location of the servers with errors in **Errors** page
- See the location of the server with the most recent error in **Monitor mode** page
- Search for or sort in columns in **Server status** page

To add a location:

1. In the navigation pane, select the **Licenses** page.
2. Search for the license for which you want to specify locations for individual servers in a distributed system. Select the license.

3. Click **Details**.



4. For each of the servers, click the pencil next to the **Location** entry and enter a meaningful location. You can:

    - Choose from the drop-down list with existing locations
    - Create a new location by clicking **New location**. Enter the name of the location and click **Save** to create it.

5. Click **Save** to associate the location name with the server.

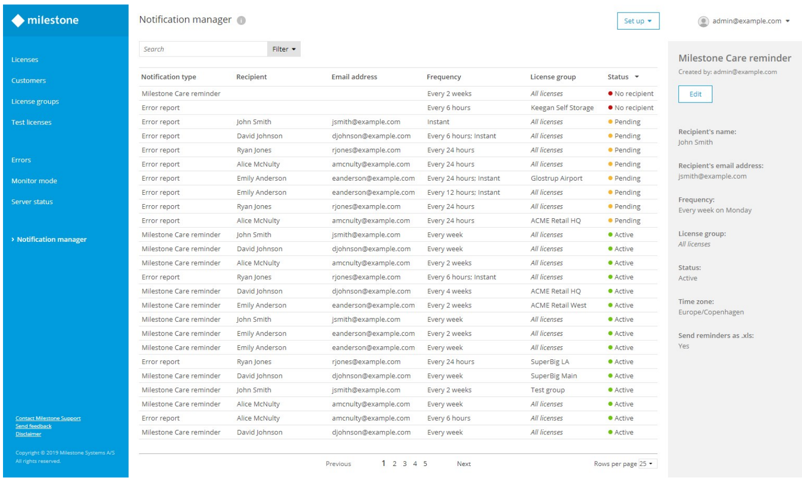
Notification manager

Notification manager

Notifications are emails that report server errors, and that list licenses with expiring Milestone Care™ coverage.

You can use the **Notification manager** to:

- Set up error reports to send email alerts when errors occur on your servers over a set time period or instantly as they occur
- Set up Milestone Care reminders to notify an account contact of licenses with expiring Milestone Care coverage
- Update or delete existing notification profiles
- Search for and filter notification profiles by notification type, status, or license group.



You can set up two types of notifications:

- **Error reports** - Instant alerts and summary reports of the health of your servers, listing any detected errors. Error reports can be sent to any recipient. Recipients must opt-in to receive emails
- **Milestone Care™ reminders** - Sends reminders about licenses with expiring Milestone Care coverage. Reminders can only be sent to contacts in your account. Does not require opt-in to receive emails.

Notification profiles can have three statuses:

- **Active** - The recipient information is valid and notifications are being sent
- **Pending** (only for error reports) - Notifications are being sent but the recipient has not yet subscribed
- **No recipient** - The recipient is no longer a valid contact, has unsubscribed, or did not subscribe within 30 days. No notifications are being sent.

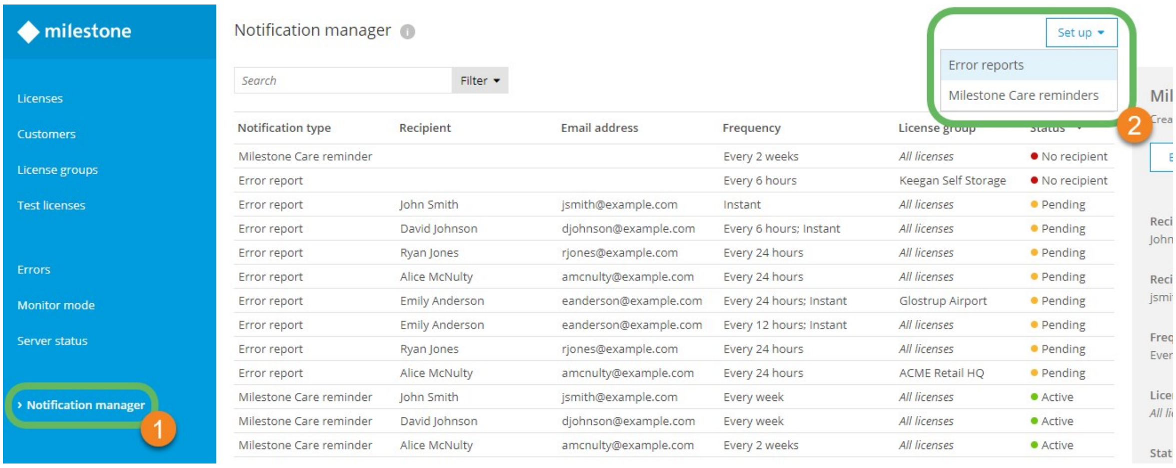
Notifications are set up for license groups (see License groups on page 32) rather than for individual licenses, but you can also create notifications for all the licenses in your account at once.

Set up error reports

Error reports are email alerts for errors detected on your servers. Reports can be sent when errors occur on your servers over a set time period or instantly as they occur. To set up error reports:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. In the main menu, select **Notification manager** ❶.
3. Select **Set up** > **Error reports** ❷.

> Alternatively, select **Set up error reports** on the **Errors** page.



4. In the **Set up error reports** window, enter a valid email address, a first name, and a last name for the recipient.

> Every time you change the **Recipient's email address** ❸, **First name** ❸, or **Last name** ❸, the recipient must subscribe to the error report again.

5. Specify a **Time zone** ❹ for the error report, usually the time zone where the recipient is located.
6. To send a summary email of the errors that occurred over a specified time period, select the **Send error report summary every** check box and specify the time interval in the dropdown: **6 hours**, **12 hours**, or **24 hours** ❺.
7. To send an email alert for every error instantly as it occurs, select the **Send an instant report for every error** check box ❻.

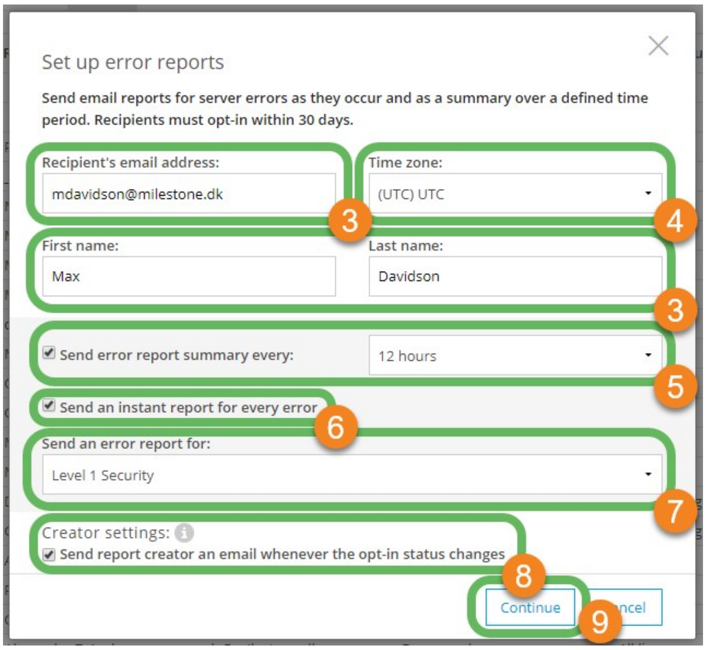
8. Optional: In the **Send an error report for** ❼ dropdown list, select a license group to specify which licenses you would like to include in the error report.

> The default ***All licenses*** selection includes all of your current licenses and any future licenses that are added to your account.

9. Optional: Select the **Send report creator an email whenever the opt-in status changes** check box ❽ to get notified about the opt-in status of the error reports. If the check box is selected, you receive an email every time the recipient subscribes, unsubscribes, or does not subscribe to the created error report profile within 30 days.

> To meet GDPR requirements (gdpr-info.eu), recipients must subscribe to error reports within 30 days. If the recipient unsubscribes or does not subscribe within 30 days, the recipient information will be deleted and the error report profile will have a **No recipient** status.

10. Select **Continue** ❾ to create the error report profile.



After completion, you can view your created error report profile information in the error report confirmation window.

After you create the error report profile information, it is listed in the **Notification manager**. Select an error report profile and select **Edit** to edit or delete the profile.

Alternatively, double-click a notification profile to edit it.

The recipient starts receiving error reports immediately, but the notification profile will have a **Status** of **Pending** until the recipient subscribes.

Related topics:

- License groups on page 32
- Notification manager on page 72

Set up Milestone Care™ reminders

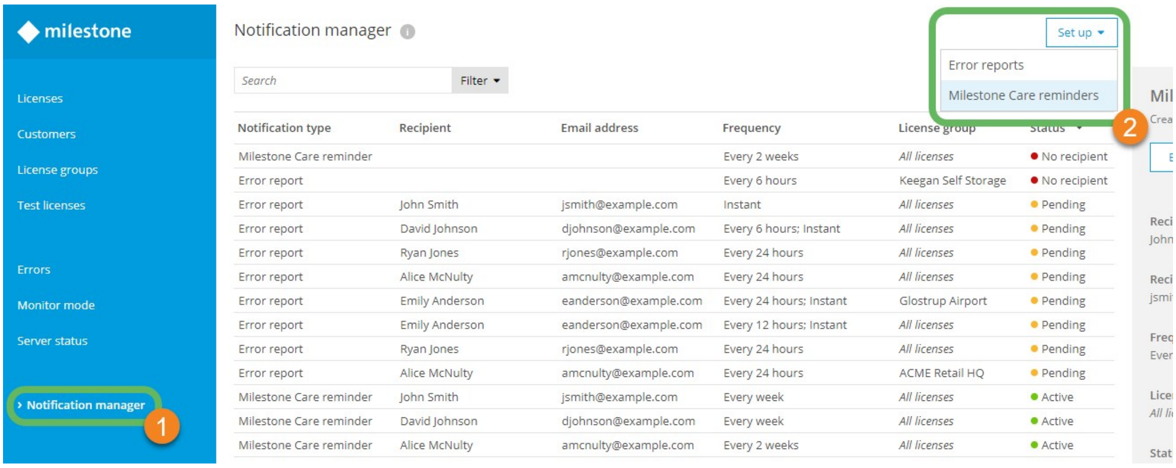
To ensure the continued Milestone Care™ coverage of the licenses in your account, set up Milestone Care reminders to send email alerts to any of your account contacts 100 days and 20 days before the coverage is set to expire.

Milestone Care reminders can only be sent to recipients that have been added as contacts to your account. To enable an account contact as a Milestone Care reminder recipient, see Give users access to Milestone Customer Dashboard on page 10, or contact your account representative.

To set up Milestone Care reminders:

1. Log in to Milestone Customer Dashboard (https://online.milestonesys.com/).
2. In the main menu, select **Notification manager** ❶.
3. Select **Set up** > **Milestone Care reminders** ❷.

> Alternatively, select **Set up reminder** on the **Licenses** page.

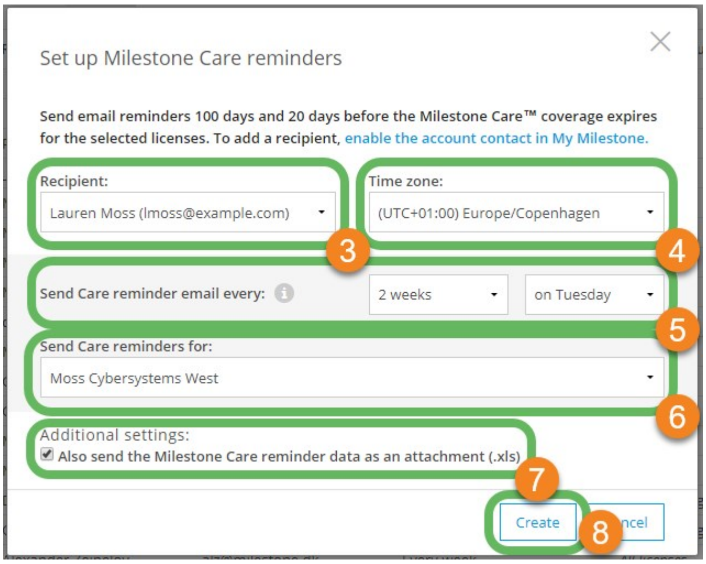


4. In the **Set up Milestone Care reminders** window, in the **Recipient** dropdown list ❸, select an account contact with an email address.
5. Specify a **Time zone** ❹ for the Milestone Care reminder, usually the time zone where the recipient is located.
6. Select the number of weeks and day of the week next to **Send Milestone Care reminder every** ❺ to specify the frequency with which the Milestone Care reminder is sent.
7. Optional: In the **Send Milestone Care reminders for** dropdown list ❻, select a license group to specify which licenses you would like to send the Milestone Care reminders for.

> The default ***All licenses*** selection includes all of your current licenses and any future licenses that are added to your account.

8. Optional: Select the **Also send the Milestone Care reminder data as an attachment (.xls)** check box ❼ to send the expiring licenses listed in a spreadsheet file, which you can view and edit in Microsoft Excel. The data is listed in a sortable spreadsheet format that is convenient if you have a large number of expiring licenses.

9. Select **Create** 8 to create the Milestone Care reminder profile.



After you create the Milestone Care reminder profile, it is listed in the **Notification manager**. Select a Milestone Care reminder profile and select **Edit** to edit or delete the profile.

Alternatively, double-click a notification profile to edit it.

If the specified recipient is removed as a contact for your account, the Milestone Care reminder will have a **No recipient** status.

Related topics:

- License groups on page 32
- Notification manager on page 72

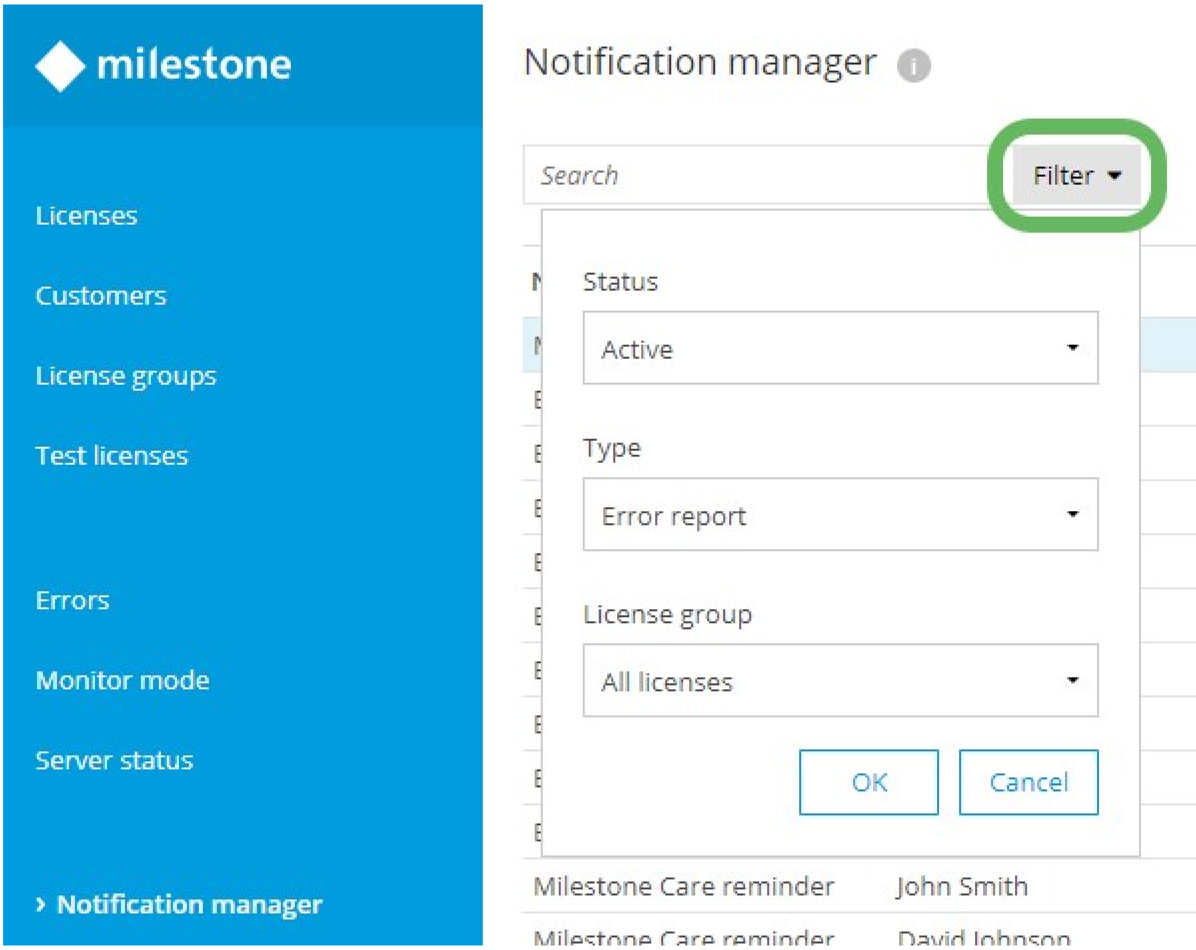
Manage notifications

You can view the notification profiles that you created in Milestone Customer Dashboard on the **Notification manager** page. Select the **information icon** to find out more about each grid entry and how they apply to different notification types. Select a column heading to sort it in ascending or descending order.

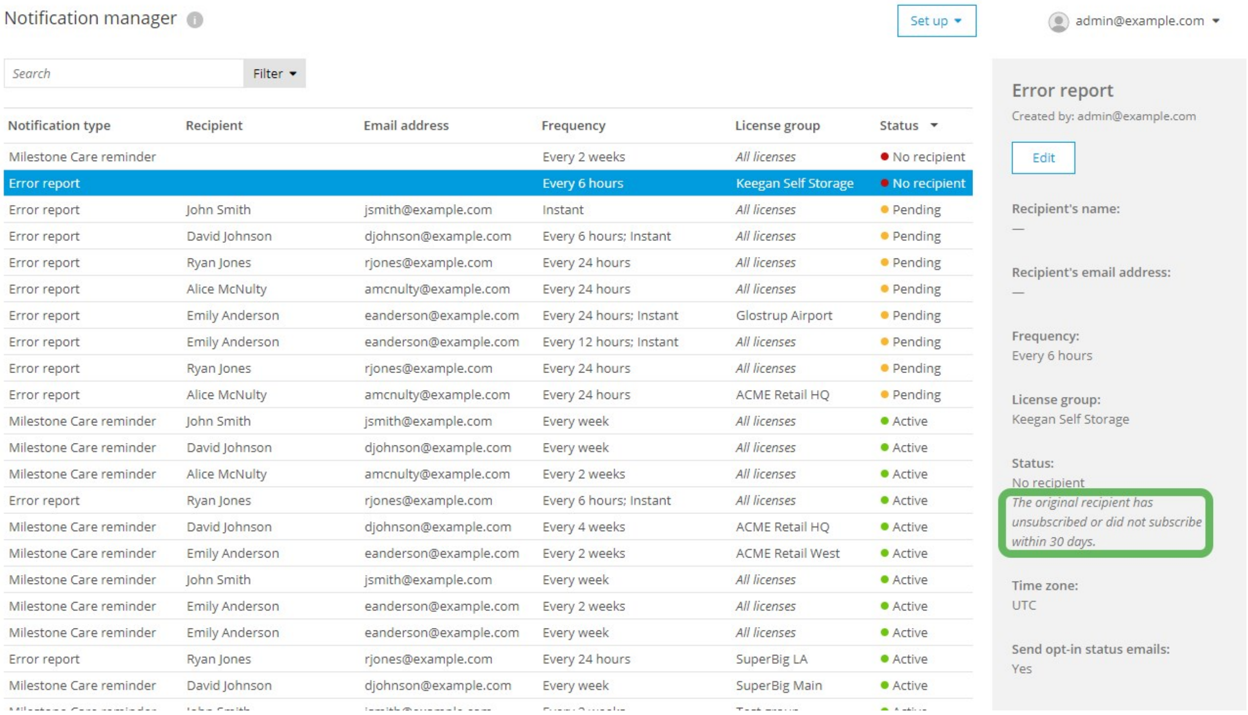
Use the **Search** field to search for notification profiles by

- **Recipient**
- **Email address**
- **License group**

Select the **Filter** list to display notification profiles according to **Status** (**Active**, **Pending**, or **No recipient**).



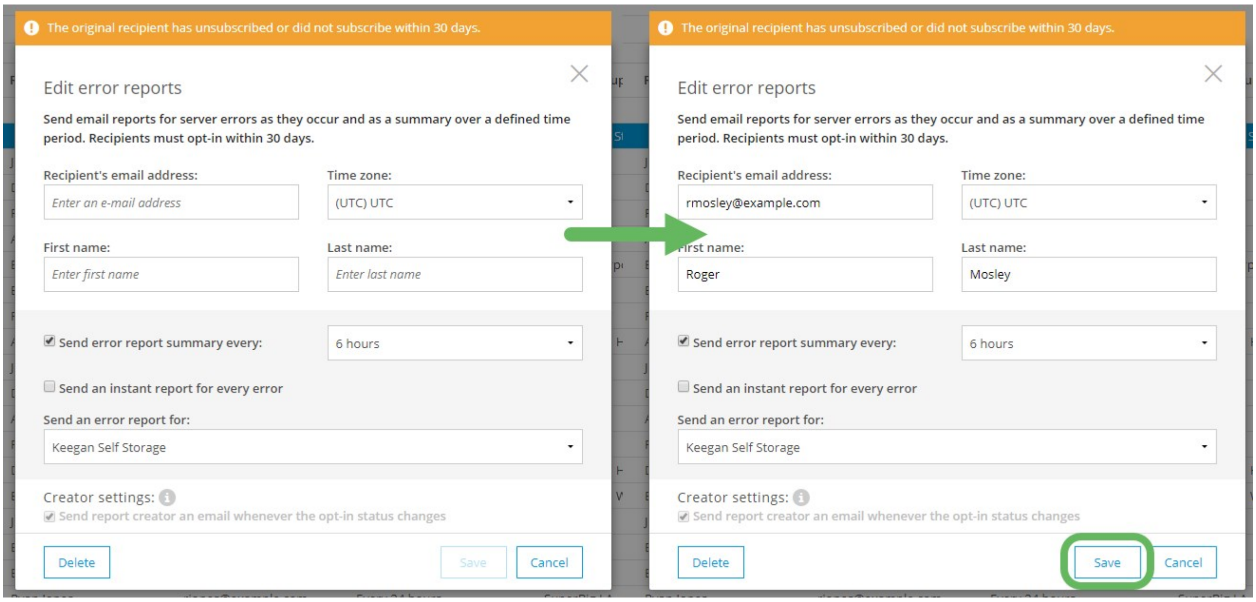
Select a notification profile to view additional information about it in the preview panel, such as its specific sending frequency or why a notification has a **No recipient** status.



> Profiles with a **No recipient** status are profiles where recipients have unsubscribed, did not subscribe, or are no longer valid contacts. Although notifications are not being sent for this profile, the profile information is retained for reference, and you can reactivate the notification by updating it with a valid recipient.

Double-click a notification profile or select **Edit** in the preview panel to open the edit window.

Here in the edit window, you can **Delete** or modify the notification profile, and, for example, update the recipient information, change the frequency, or select a different license group. The **Save** button becomes active after you make changes to the notification profile.


The original recipient has unsubscribed or did not subscribe within 30 days.
Edit error reports
Send email reports for server errors as they occur and as a summary over a defined time period. Recipients must opt-in within 30 days.
Recipient's email address:
Enter an e-mail address
Time zone:
(UTC) UTC
First name:
Enter first name
Last name:
Enter last name
Send error report summary every:
6 hours
Send an instant report for every error
Send an error report for:
Keegan Self Storage
Creator settings:
Send report creator an email whenever the opt-in status changes
Delete
Save
Cancel
The original recipient has unsubscribed or did not subscribe within 30 days.
Edit error reports
Send email reports for server errors as they occur and as a summary over a defined time period. Recipients must opt-in within 30 days.
Recipient's email address:
rmosley@example.com
Time zone:
(UTC) UTC
First name:
Roger
Last name:
Mosley
Send error report summary every:
6 hours
Send an instant report for every error
Send an error report for:
Keegan Self Storage
Creator settings:
Send report creator an email whenever the opt-in status changes
Delete
Save
Cancel

helpfeedback@milestone.dk

About Milestone

Milestone Systems is a leading provider of open platform video management software; technology that helps the world see how to ensure safety, protect assets and increase business efficiency. Milestone Systems enables an open platform community that drives collaboration and innovation in the development and use of network video technology, with reliable and scalable solutions that are proven in more than 150,000 sites worldwide. Founded in 1998, Milestone Systems is a stand-alone company in the Canon Group. For more information, visit https://www.milestonesys.com/.