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Milestone Systems

XProtect® VMS

Administrator Getting Started Guide

XProtect Express
XProtect Professional

milestone

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All names of people and organizations used in the examples in this text are fictitious. Any resemblance to any actual organization or person, living or dead, is purely coincidental and unintended.

This product may make use of third-party software for which specific terms and conditions may apply. When that is the case, you can find more information in the file 3rd_party_software_terms_and_conditions.txt located in your Milestone system installation folder.

Guide contents

This guide briefly explains how to install your XProtect system as well as how to configure some of its basic features.

The guide is valid for:

- **XProtect® Professional**
- **XProtect® Express**

Check the Milestone website (http://www.milestonesys.com/downloads) for updates to make sure that you install the most recent version of your system.

Installation

Minimum system requirements

For information about system requirements for the various components of your system, read the release notes available on http://www.milestonesys.com.

Administrator rights

When you install your system, it is important that you have administrator rights on the computer that should run your system. If you only have standard user rights, you cannot configure the surveillance system.

Install the software

Prerequisites: Shut down any existing surveillance software.

1. Run the installation file. Depending on your security settings, you may receive one or more security warnings. Click the **Run** button if you receive a warning.
2. When the installation wizard starts, select language for the installer and then click **Continue**.
3. Select if you want to install a trial version of your system or indicate the location of your software license file.
4. Read and accept the license agreement, and indicate if you want to participate in the Milestone data collection program.
5. Select **Typical** or **Custom** installation. If you select **Custom** installation, you can select application language, which features to install and where to install them. Let the installation wizard complete.

You can now begin configuring your system through the Management Application.

If you are upgrading from a previous version, make sure you read the upgrade information in the Administrator Manual for the relevant XProtect Professional VMS product.

Getting started

About the Getting started page

The **Getting started** page is always shown when you open the Management Application. The **Getting started** page serves as a place of reference for users. It also provides different wizards that help to configure your surveillance system quickly. After you have run the wizards, it is likely that you need to fine-tune your system further. For more information, see the Advanced configuration chapter in the help.

Under the **License** heading in the bottom-left part of the page, you can get an overview of your system's hardware device licenses and your number of device changes without activation.

You can also access and view video tutorials that show and explain how to go through each step of your system's wizards. To access the video tutorials, click the **View tutorials** link in the bottom-right part of the page. The link takes you to an external web page with video tutorials for your system.

Automatic configuration wizard

The **Automatic configuration** wizard is for easy configuration for first time use of the system. Use the wizard to automatically add cameras to your system using this step-by-step procedure.

Automatic configuration wizard: First page

When you open the Management Application for the first time, the Automatic configuration wizard opens to guide you through the process of adding hardware devices to your system.

If you are new to the system, click **Yes, configure** to scan your network for available cameras and configure your system. To exit and use a more advanced way of adding devices to your system, click **Skip** to leave the wizard and go to the Management Application to get more options for setting up your system's device configuration.

Automatic configuration wizard: Scanning options

Choose where you want your system to scan for cameras and devices.

By default, the **Scan local network** checkbox is selected, which means that you only scan your local network for devices. However, if you know the IP address or a range of IP addresses to which cameras and devices are attached, specify these by clicking the Plus icon next to **Add the IP addresses or IP ranges to be scanned**. You can add more than one range of IP addresses if you need to.

Automatic configuration wizard: Select hardware manufacturers to scan for

If you know the specific manufacturer of your hardware device(s), select these in the dropdown on this page. You can select as many manufacturers as you want to.

Note: All manufacturers are selected by default. If you want to reduce the scanning time or know the specific manufacturers of your cameras, only select the checkboxes that represent these manufacturers.

Automatic configuration wizard: Scanning for hardware devices

Scanning for hardware devices that match your selected manufacturers begins. A status bar indicates how far in the scan process you are. Once scanning for cameras and devices is complete, you may need to provide user name and password for your selected devices or cameras. When you have typed in the relevant credentials, click the **Verify** button to add the device to your system.

Note: Not all devices and cameras need a user name and password. You can add such devices to your system without any need to type in credentials.

Automatic configuration wizard: Continue after scan

Once you have added the number of devices and cameras you want to add, your system sets up storage for you. Storage is the location to which your system saves recordings. By default, your system chooses the location with most available disk space.

When the system has finished configuring storage, you are given the option to automatically add new cameras to your system as they are detected on the network. Enabling this allows you to set up your system so that any devices or cameras are automatically set up for you in the future as soon as they are connected to your network. Note that not all devices and cameras support automatic discovery.

If your device/camera does not show up automatically after you have connected it to your network, you must add it manually.

If a device/camera has been added to your system previously and you removed it, the device cannot be discovered automatically and you must add it manually.

To go directly to XProtect Smart Client once you have completed the wizard, select the check box in the bottom-left corner of the wizard page.

Configure in Management Application

The Management Application is the server-side user interface. All management of your system is handled here.

Licensing

When you purchase your software and licenses, you receive:

- An order confirmation.
- A software license file named after your SLC (Software License Code) and with the .lic extension.

Your SLC is also printed on your order confirmation and consists of several numbers and letters grouped by hyphens like:

- Product version 2014 or earlier: xxx-xxxx-xxxx
- Product version 2016 or later: xxx-xxx-xxx-xx-xxxxxx

The software license file contains all information about your purchased VMS products and licenses. Milestone recommends that you store the information about your SLC and a copy of your software license file in a safe place from which you can find them again.

To get started, you download the software from our website. While you are installing the software, you are asked to provide the software license file. If you have not yet received the software license file, you can still install the software and run it for a 30-day trial period with a maximum of eight added cameras and a retention time of maximum five days. To continue using your system, you must import your software license file before the end of the trial period.

When the installation of your system is complete and you have added your cameras, encoders and other relevant hardware, you must activate your licenses. If your system is online, your licenses are activated automatically and only in a few scenarios, you need to activate them manually. If your system is offline and you have used all of your device changes without activation, you must manually activate your licenses each time you make changes that affect your use of your licenses. It is important that you activate licenses in a grace period before the grace period ends because the then unlicensed hardware stops sending data to the system.

When the installation is complete, please refer to the help for your Professional VMS product, for more information about:

- how our license system works specific for your Professional VMS product
- how you activate your licenses manually
- when you need to activate your licenses manually even if your system is online
- what device changes without activation is
- where you see how many used and free licenses you have

Add hardware devices

To add more cameras after having run the **Getting Started** wizard, do the following:

1. On the **Getting started** page, start the **Add Hardware** wizard.
2. Select a hardware detection method, and follow the wizard.

Before you add hardware devices, make sure you have configured their IP addresses, user name and passwords as described by the manufacturers.

Configure user access

To quickly and easily configure how client applications should access your system server, and which users should be able to use the client applications, start the **Configure User Access** wizard. Note that the wizard gives users access to all cameras on your system. If you require different rights for individual users, you should use advanced configuration instead:

- Under **Advanced Configuration** > **Server Access**, specify port number to use, whether you want clients to be able to access the system server from the Internet, how many clients you want to be able to connect simultaneously and more.
- Under **Advanced Configuration** > **Users**, configure settings and rights for client access. You can add users from Active Directory, which allows you to use your organization's existing user data.

Configure a Mobile server

A Mobile server handles log-ins when a user wants to log into his/her XProtect surveillance setup via the XProtect Web Client, or the Milestone Mobile client from a mobile device.

Upon correct login, the Mobile server distributes video streams from relevant recording servers to XProtect Web Client or Milestone Mobile client. This offers an extremely secure setup, where recording servers are never connected to the Internet. When a Mobile server receives video streams from recording servers, it also handles the complex conversion of codecs and formats allowing streaming of video on the mobile device.

Add a Mobile server:

1. Go to **Servers** > **Mobile Servers**. From the menu that appears, select **Create New**. Fill in/edit the needed properties.

Important: If you edit settings for **Login method**, **All cameras view** and **Outputs and events**, while you are connected to the Milestone Mobile client, you must restart the Milestone Mobile client for the new settings to take effect.

Delete a Mobile server:

1. Expand **Servers** > **Mobile Servers** in order to see existing servers.
2. Right-click the unwanted server and select **Delete**. Click **Yes**.

Rename a Mobile server:

1. Expand **Servers** > **Mobile Servers** in order to see existing servers.
2. Select the required Mobile server.
3. On the **Info** tab, which opens once the Mobile server is selected, change the name of the server by typing in the **Server name** and **Description** fields.
4. In the lower right corner, click **Apply**.

Additional features

XProtect Download Manager

Manage which system features your organization's users can access from a targeted welcome page on the surveillance system server. Access XProtect Download Manager from Windows' **Start** menu. XProtect Download Manager comes with a default configuration ensuring that users get access to the XProtect Smart Client. To make special language versions, plug-ins or similar available to users.

Matrix

The Matrix feature allows distributed viewing of live video from any camera to any Matrix recipient on a network operating with your system. A computer on which you can view Matrix-triggered video is known as a Matrix recipient. In order to become a Matrix recipient, the computer must have XProtect Smart Client installed.

Built-in help system

To access the help system from anywhere within the Management Application, click the **Help** button in the toolbar or press **F1** on your keyboard.

Upgrade from a previous version

You can upgrade your entire system configuration from one version to another. The following information applies if you upgrade from one version of a product to another version of the same product and if you upgrade to one XProtect product from another streamlined XProtect product.

When you install the new version of your system, it inherits the configuration from your previous version. Milestone recommends that you make regular backups of your server configuration as a disaster recovery measure. You should also do this when you upgrade your server. While it is rare that you lose your configuration (cameras, schedules, views, and more), it **can** happen under unfortunate circumstances. Fortunately, it takes only a minute to back up your existing configuration.

Back up configuration

The following describes backup of the configuration in XProtect Professional VMS 7.0 and onwards. If you need information about how to back up configuration from an earlier version, see the relevant Administrator's Manual for your XProtect product.

In the following, we assume that you have not changed the system's default configuration path, which is **C:\Program Data\Milestone\Milestone Surveillance** on servers running all supported operating systems. If you have changed the default configuration path, you must take your changes into consideration when using the method described in the following.

1. Make a copy of the folder **C:\Program Data\Milestone\Milestone Surveillance** and all of its content.
2. Open the folder **C:\Program Files\Milestone\Milestone Surveillance\devices**, and verify if the file **devices.ini** exists. If the file exists, make a copy of it. The file exists if you have configured video properties for certain types of cameras. For such cameras, changes to the properties are stored in the file rather than on the camera itself.
3. Store the copies away from the server, so that they are not affected if the server is damaged, stolen or otherwise affected.

Remember that a backup is a snapshot of your system configuration at the time of backing up. If you later change your configuration, your backup does not reflect the most recent changes. Back up your system configuration regularly.

When you back up your configuration as described, the backup includes restore points. This allows you to not only restore the backed-up configuration, but also to revert to an earlier point in that configuration if you need to.

Restore configuration

If you need to restore your system configuration, do the following:

1. Copy the content of the backed-up **Milestone Surveillance** folder into **C:\Program Data\Milestone\Milestone Surveillance**.
2. If you backed up the file **devices.ini**, copy the file into **C:\Program Files\Milestone\Milestone Surveillance\devices**.

Upgrade video device drivers

1. On the system server on which you want to install the new video device drivers version, shut down any running surveillance software, including any running Recording Server service.
2. Run the XProtect Device Pack installation file and follow the wizard.
3. When the wizard is complete, remember to start the Recording Server service again.

Video device drivers are installed automatically during the initial installation of your system. New versions of video device drivers are collected in device packs which are released from on a regular basis and made available for free on the Milestone website (http://www.milestonesys.com) (within the same product version).

Milestone recommends that you always use the latest version of video device drivers. When you update video device drivers, you can install the latest version on top of any version you may have installed.

IMPORTANT: When you install new video device drivers, your system cannot communicate with camera devices from the moment you begin the installation until the moment installation is complete and you have restarted the Recording Server service. This process usually takes no longer than a few minutes, but Milestone recommends that you perform the update at a time when you do not expect important incidents to take place.

For more information

For information about how to back up and upgrade your system as well as how to change advanced settings in your system, read the Administrator's Guide for your relevant XProtect product. You can always find the latest Administrator Guides at the Milestone website (http://www.milestonesys.com/support/manuals-and-guides/).

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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/.