XiO Cloud®

Management Portal

User Guide

Crestron Electronics, Inc.

Original Instructions
The U.S. English version of this document is the original instructions.
All other languages are a translation of the original instructions.

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Introduction

The XiO Cloud® provisioning and management service allows all supported Crestron® devices and certain supported third-party devices across an enterprise to be managed and configured from one central, secure location in the cloud. The XiO Cloud service may be used to view the status of a device, to configure various device and network settings, to manage licenses, and to update device firmware.

The XiO Cloud Management Portal provides Authorized Resellers and Crestron Service Providers (together, Authorized Support Providers) with the ability to easily view and access their customers' XiO Cloud accounts[1]. SSO (single sign-on) capabilities allow support providers to access the XiO Cloud Management Portal and to create a portal account for their organization directly through their Crestron.com web account.

This document provides instructions on how to enable access to the XiO Cloud Management Portal, log in, and use the web configuration interface to manage customer accounts.

For more details and additional resources, refer to https://www.crestron.com/xiocloud.

NOTE: This document is current as of the XiO Cloud version 1.29 release.

[1] Authorized Support Provider access to customer XiO Cloud accounts is subject to authorization by the customer and to Crestron's XiO Cloud Monitoring Services Terms of Use, available at: www.crestron.com/XiOMonitoringTOU.

XiO Cloud Accounts Overview

There are two different types of XiO Cloud accounts with varying functions and permissions:

- **Customer Account**: The customer account may also be referred to as a tenant. The customer account user interface allows the customer to view, provision, and manage all supported devices within their XiO Cloud tenant. Devices are organized into licensed rooms or room groups that are registered to the account.
- **XiO Cloud Management Portal Account**: The XiO Cloud Management Portal allows support providers to create a portal account to access associated customer accounts from one location. The XiO Cloud Management Portal provides two user roles (Integrator Admin and Integrator User).

The following table defines the Integrator Admin and Integrator User roles within the XiO Cloud Management Portal.

XiO Cloud Management Portal User Roles

User Role	Scope
Integrator Admin	Integrator Admins assign customer accounts to Integrator Users. Integrator Admins are added automatically to customer accounts as a **Standard User** with **Viewer** permissions. Elevated permissions can be granted by a Global Administrator within the customer account. Refer to the "Manage User Access" within the XiO Cloud® Provisioning and Management Service User Guide for more information on customer account permissions.
Integrator User	Integrator Users are only able to view customer accounts to which they have been assigned. Integrator Users are added automatically to customer accounts as a **Standard User** with **Viewer** permissions after the accounts are assigned by an Integrator Admin. Elevated permissions can be granted by a Global Administrator within the customer account. Refer to the "Manage User Access" within the XiO Cloud® Provisioning and Management Service User Guide for more information on customer account permissions.

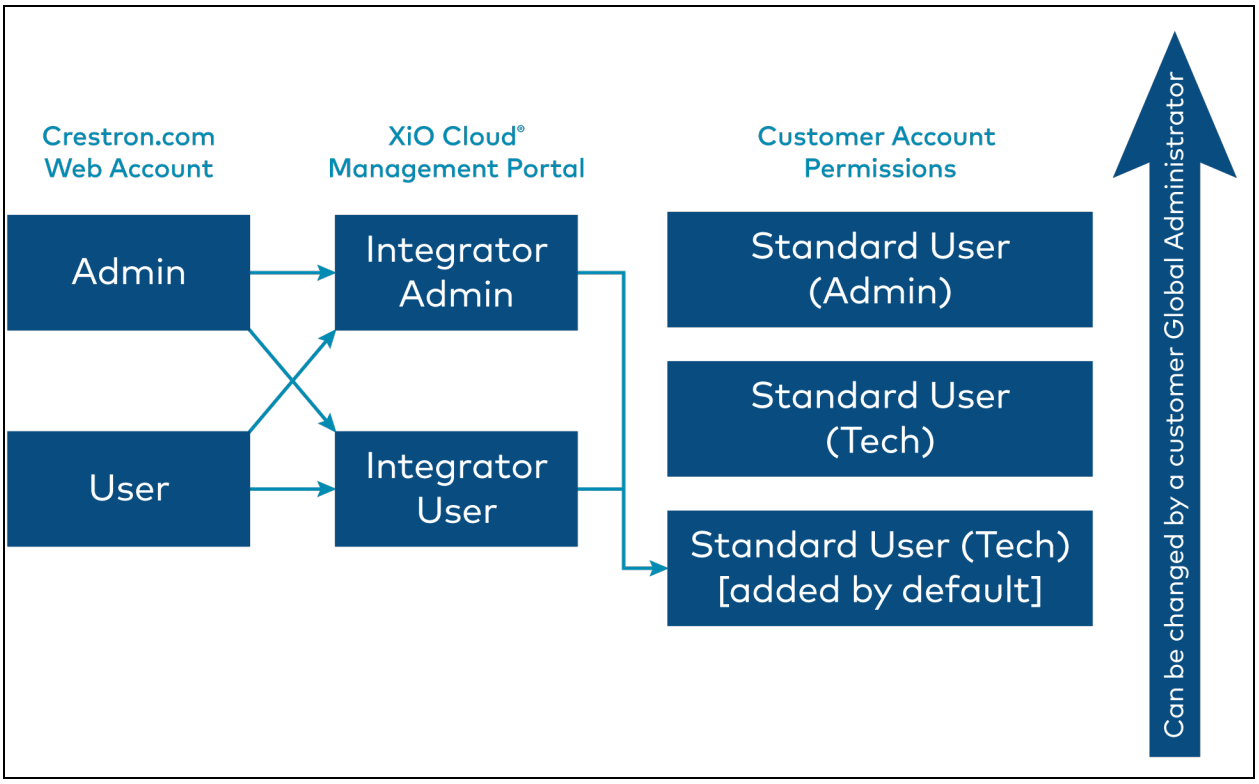
Integrator Users will not see any customer accounts in the XiO Cloud Management Portal until they are granted access to the accounts by an Integrator Admin. Therefore, at least one Integrator Admin should be added to the XiO Cloud Management Portal before adding any Integrator Users.

For customer convenience, one portal account user should be elevated to a **Standard User** with **Admin** permissions within the customer account, as this will allow the elevated user to add other portal account users to the customer account.

NOTE: Crestron strongly recommends that portal account users should not be elevated to Global Administrators within the customer account.

Refer to the following diagram for more information on the relationship between portal account users and customer account permissions.

XiO Cloud Management Portal User Role Mapping

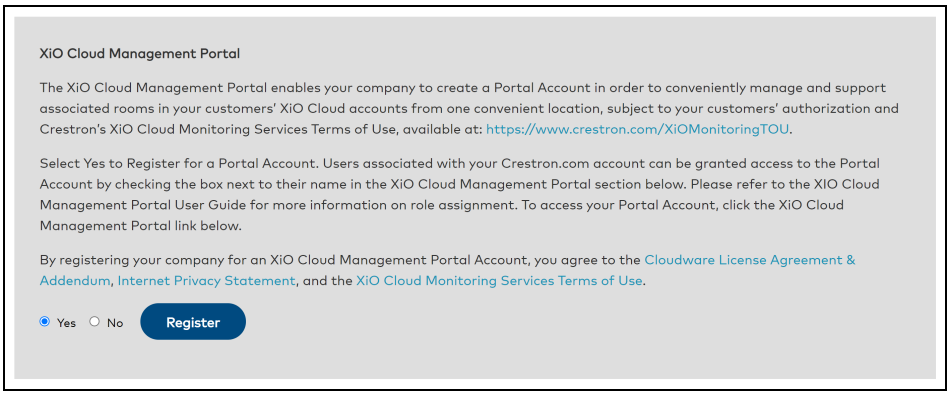


Enable Portal Account Access

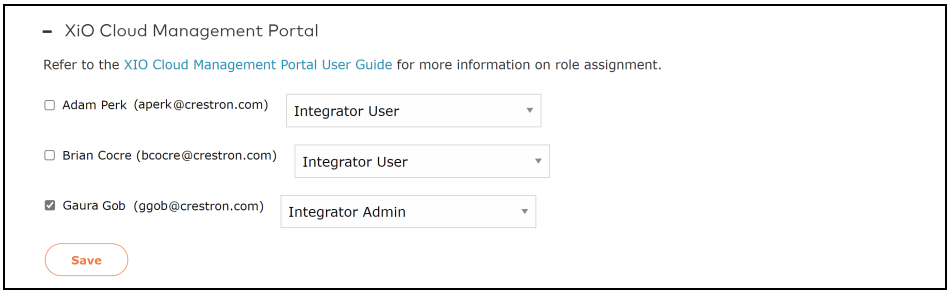
Access to the XiO Cloud Management Portal must be enabled in the support provider's Crestron.com account before the portal account can be accessed.

NOTE: Support providers must have a Crestron.com account with applicable permissions in order to use the XiO Cloud Management Portal. For more information on creating a Crestron.com web account, refer to www.crestron.com/register.

1. Log into your account at www.crestron.com.
2. Navigate to **My Account** > **Administration**.
3. Click the **Application Access** tab and scroll to the **XiO Cloud Management Portal** section.



4. Fill the **Yes** radio button and click **Register**.
5. Expand the **XiO Cloud Management Portal** accordion under the **Manage Application Access** section.



6. Manage access and permissions for account users:
   - Fill the checkbox next to a user's name to allow that user to access the XiO Cloud Management Portal.
   - Use the drop-down menu to select whether the user is an **Integrator User** or an **Integrator Admin**. Refer to XiO Cloud Accounts Overview (on page 2) for more information on these roles within the portal account.
7. Click **Save** to update the account settings.

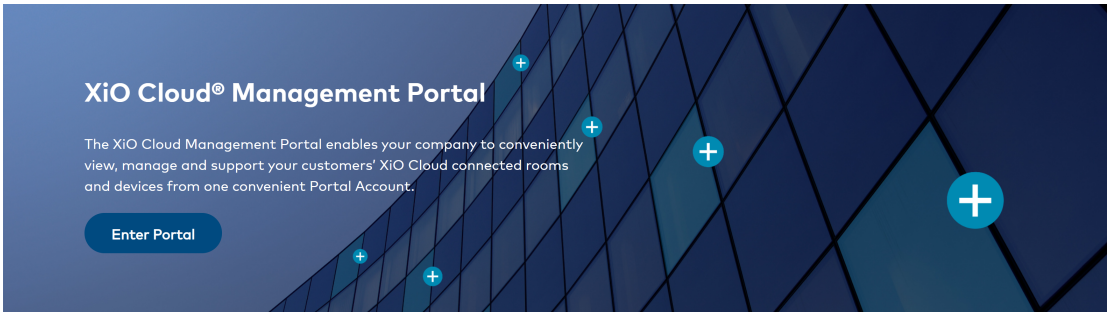
All user management for the portal account occurs within Crestron.com. A user with admin permissions on the support provider's Crestron.com account can add or remove another user's access to the associated portal account.

Portal Account Login

Once the XiO Cloud Management Portal has been enabled as described in Enable Portal Account Access (on page 4) and at least one Crestron.com user has been assigned portal account access, the portal account can be accessed directly from the Crestron.com website home page.

NOTE: The support provider user must be logged into Crestron.com with the applicable web account credentials to access the portal account.

XiO Cloud Management Portal Banner

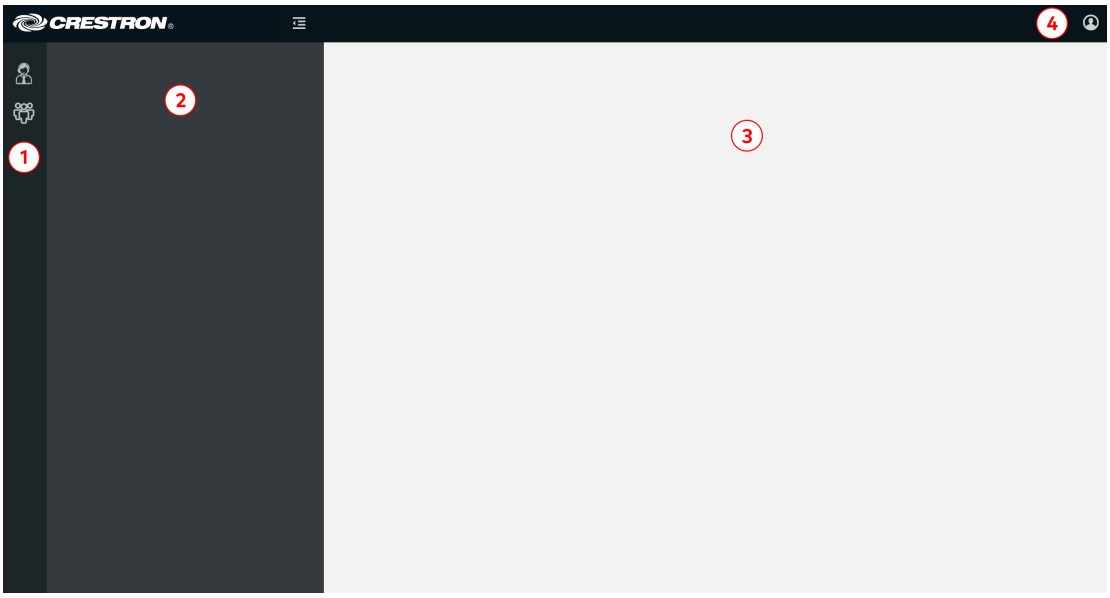


Scroll to the **XiO Cloud® Management Portal** banner and click the **Enter Portal** button. The support provider user is logged into the portal account automatically via SSO using their web account credentials.

NOTE: User access to the portal account must first be authorized as described in Enable Portal Account Access (on page 4).

Upon successful login, the user is redirected to the XiO Cloud Management Portal account.

XiO Cloud Management Portal Account



The XiO Cloud Management Portal user interface comprises the following sections. The numbers in the list below correlate to the numbers shown in the image on the previous page.

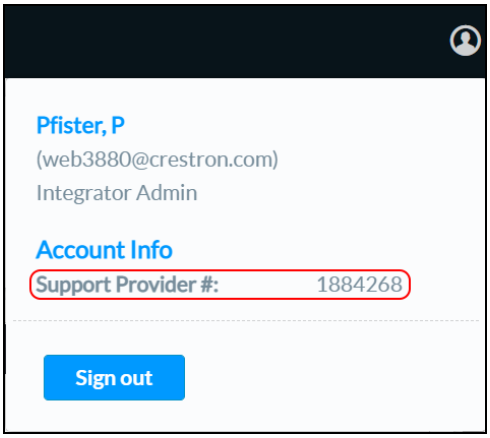
1. The navigation menu is used to navigate through the user interface. For more information, refer to Navigate the Portal Account (on page 9).
2. The left pane provides additional menus or items based on the selected navigation button. For example, selecting the **Accounts** button will display a list of associated customer accounts.
3. The right pane provides user interface controls for the selected menu item. For example, selecting a customer account from the left pane will display controls to view the customer account settings.
4. The account button is used to view details about the XiO Cloud Management Portal account, including the account ID that must be provided to customers so that they can authorize Portal Account user access to their customer account.

Customer Account Authorization

A portal account user can access a customer's account via the XiO Cloud Management Portal only after being authorized by the customer. For more information on how to authorize support provider access to a customer account, refer to "Manage Support Providers" in the XiO Cloud® Provisioning and Management Service User Guide.

The support provider must provide their XiO Cloud Management Portal account ID to the customer as part of the authorization process. To locate the XiO Cloud Management Portal account ID, click the user profile button on the top right of the user interface. The user profile menu is displayed.

User Profile Menu



The account ID is the seven-digit number listed next to **Support Provider #** as shown in the image above.

Navigate the Portal Account

The XiO Cloud Management Portal provides a navigation menu on the left of the page. The navigation menu is used to access the primary functions of the portal.

Navigation Menu

The following navigation controls are provided:

- Click the **Accounts** button to access the accounts menu, which contains all associated customer accounts that the portal account user is authorized to manage.
- Click the **Users** button to view portal account users. User management occurs within the support provider's Crestron.com web account.

Certain navigation controls show an expanded menu when selected. For example, clicking the **Accounts** button shows the accounts menu in the expanded menu.

- Expanded menus can be collapsed by clicking the collapse button in the header bar.
- When the menu is collapsed, click the expand button to display the menu again.

Manage Customer Accounts

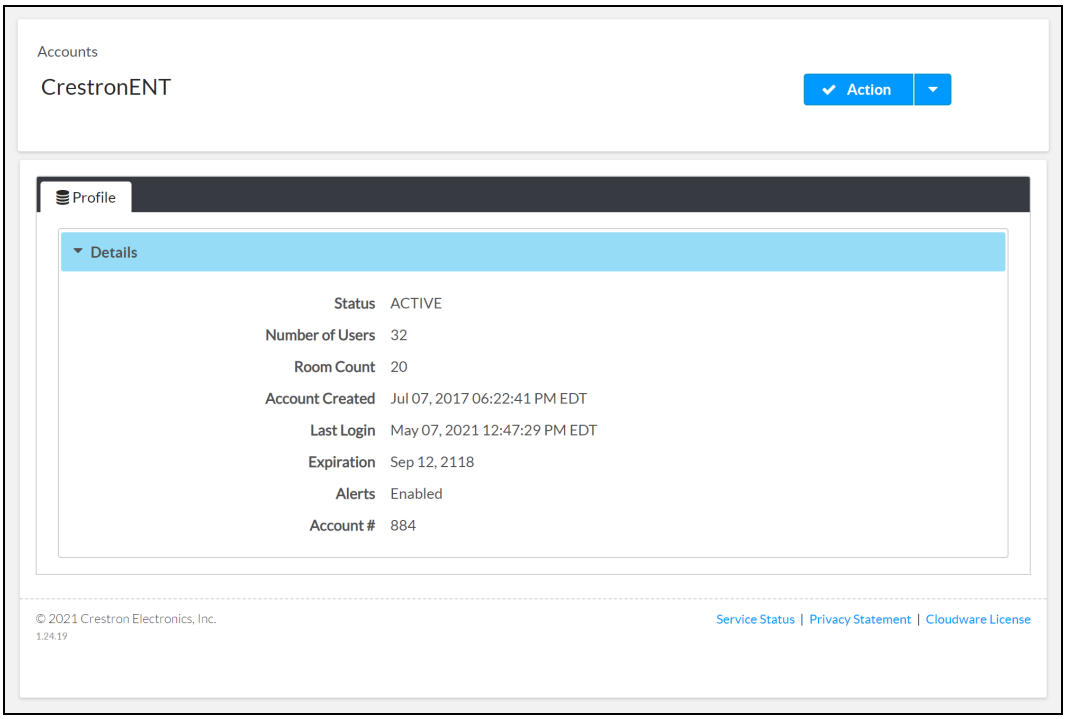
Customers can allow support providers to manage and access their XiO Cloud accounts via the XiO Cloud Management Portal. Customers can revoke a support provider's access to their XiO Cloud customer account at any time. For more information, refer to the XiO Cloud® Provisioning and Management Service User Guide (Doc. 8214).

Click the **Accounts** button from the navigation menu to show all customer accounts that the portal account user is authorized to manage. Customer accounts are ordered alphabetically.

Accounts Menu

Select a customer account from the menu to view the status of the account.

Accounts Page - Profile Tab



Profile Tab

The **Profile** tab provides the following details about the customer account.

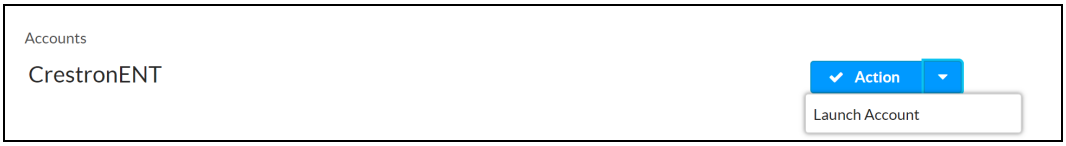
- **Status**: Indicates whether the customer account is currently active.
- **Number of Users**: The number of active users within the customer account.
- **Room Count**: The number of active rooms within the customer account.
- **Account Created**: The date and time the customer account was created by Crestron.
- **Last Login**: The date and time that a user last logged into the customer account.
- **Expiration**: The date that the last license in the customer account is set to expire.
- **Alerts**: Indicates whether alerts have been enabled for the customer account.
- **Account #**: The Crestron account number for the customer account.

Launch Customer Account

Select **Launch Account** from the **Action** drop-down menu on the top-right of the page to access the associated customer account. The portal account user is able to access licensed rooms in the customer account via SSO without having to enter the customer account credentials.

NOTE: The portal account user can only access rooms that have been assigned to them by a Global Administrator within the customer account user interface. Refer to the "Manage User Access" within the XiO Cloud® Provisioning and Management Service User Guide for more information on customer account permissions.

Actions Menu - Launch Account



The associated customer account user interface opens in a new browser window.

Manage Portal Account Users

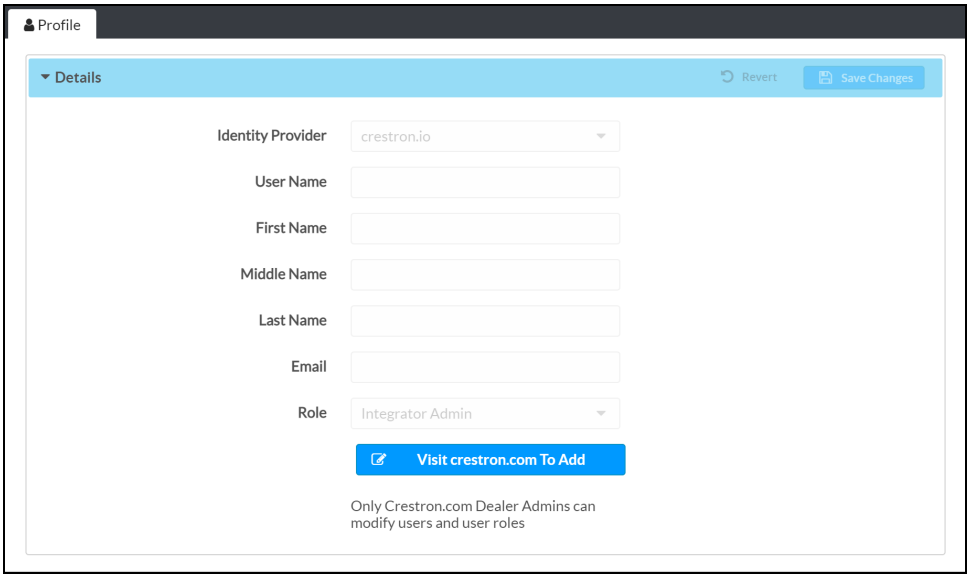
Click the **Users** button from the navigation menu to show all users that have been granted access to the XiO Cloud Management Portal account. Portal account users can be added or removed via the support provider's Crestron.com account.

Users Menu

Add a New User

Click the **+** (plus) button at the top right of the **Users** menu to add a new portal account user. The **Users** page is displayed with a **Profile** tab opened.

Users Page - Profile Tab (Add New User)



Click the **Visit crestron.com To Add** button to add a new portal account user via the support provider's Crestron.com account. The Crestron website is opened in a new window. Refer to Enable Portal Account Access (on page 4) for more information.

NOTE: Portal account users cannot be added within the portal account. Only admin users can add new portal account users within the support provider's Crestron.com account.

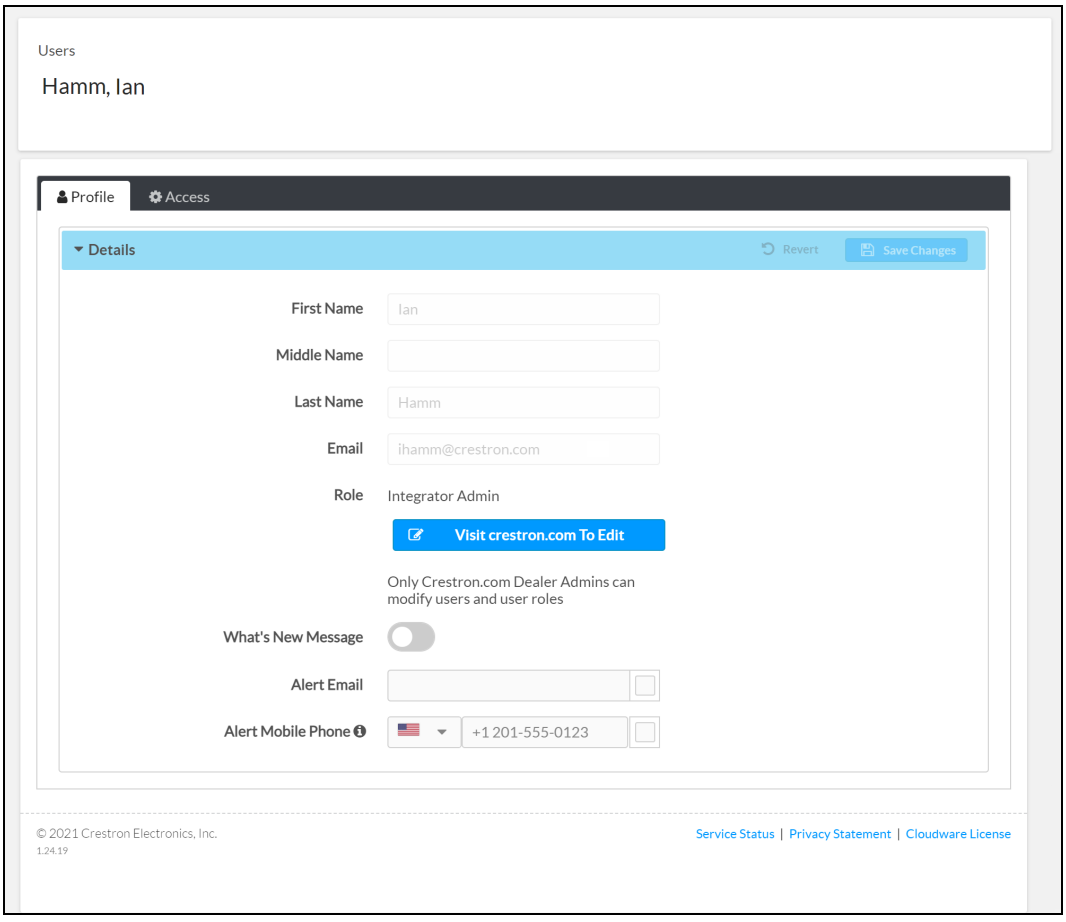
Edit a User

Select a portal account user from the menu to view their user profile. Alert messages can also be configured for the user from within the portal account.

Profile Tab

The **Users** page is displayed with a **Profile** tab opened.

Users Page - Profile Tab (Edit a User)



Click the **Visit crestron.com To Edit** button to edit a portal account user via the support provider's Crestron.com account. The Crestron website is opened in a new window. Refer to Enable Portal Account Access (on page 4) for more information.

NOTE: Portal account users cannot be edited within the portal account. Only admin users can edit portal account users within the support provider's Crestron.com account.

The following user settings can be managed from the portal account:

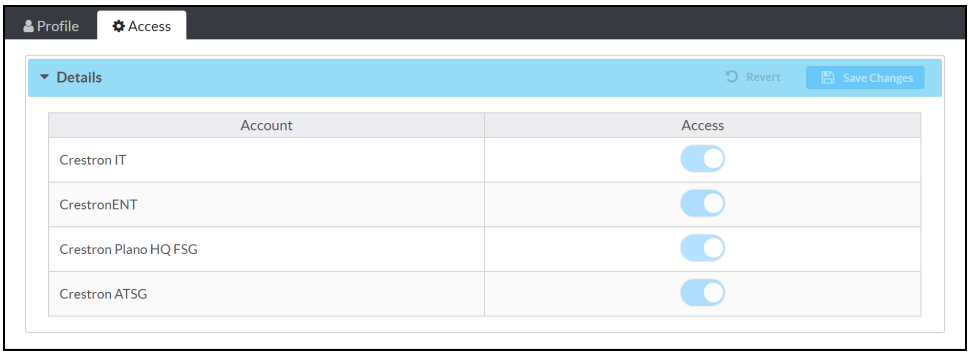
- Turn on the **What's New Message** toggle to allow the user to receive periodic messages regarding new XiO Cloud service features and functions. For more information, refer to "What's New Message" in the XiO Cloud Provisioning and Management Service User Guide (Doc. 8214).
- If alerts are enabled in the XiO Cloud customer account(s), enter an email or phone number in the **Alert Email** and **Alert Mobile Phone** text fields, respectively, to receive alert messages via the chosen communication method. For more information, refer to "Alerts" in the XiO Cloud Provisioning and Management Service User Guide (Doc. 8214).

Access Tab

Click the **Access** tab to view the customer accounts that the portal user can access from the portal account. By default, Integrator Admin users have access to all paired customer accounts. Integrator Admins can assign customer account access to Integrator Users through the XiO Cloud Management Portal.

NOTE: A portal account user can access a customer's account via the XiO Cloud Management Portal only after being authorized by the customer. If the support provider has previously created a user in the customer account (not through the portal account), that user must be managed manually. Therefore, Crestron recommends deleting any previous support provider users in the customer account once portal account user access has been authorized.

Users Page - Access Tab



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