

New Seat Licensing Model

XMReality Remote Guidance



Document Content

This document contains instructions on how to get started with and how to use the new seat licensing model for XMReality Remote Guidance.

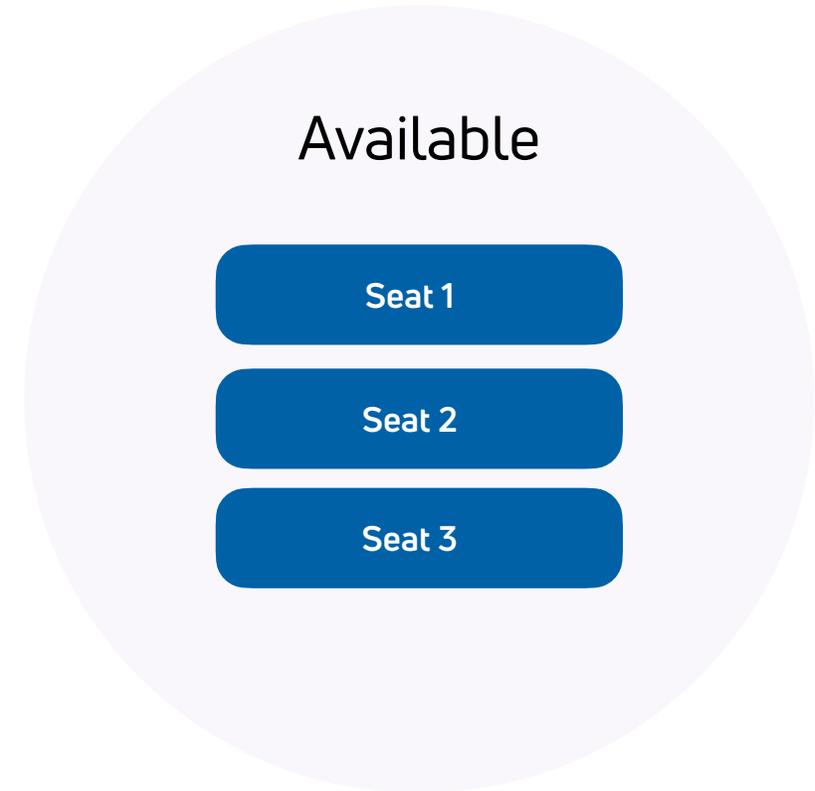
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Overview

Overview

- A seat license is a license that can be shared by multiple users, but only one user can be logged in to one seat at a time, on one device.
- The available seat licenses can be distributed to different seat pools. Users can then be assigned to the pools. A user can only be assigned to one pool.
- A domain can have both named (personal) licenses and seat licenses, but a single user can not have both. A user *either* has a named license or a is assigned to a seat pool (but it is possible to change users from one license model to the other).



Migrating From Old to New Seat License Model

If you are using generic accounts that many users access (like “support@example.com”) you need to do the following:

1. Create seat pools or use the default one (page 7)
2. All users with access to the generic account need to get their own personal accounts. You can send invites or add them directly (page 13)
3. Make sure that the users are assigned to the right seat pool (page 14)
4. With steps 1-3 is complete, remove the generic accounts (page 27)

Seat Pools

Seat Pools

All seat pools on the domain are displayed in the users tab. (Only domain administrators can see this tab)

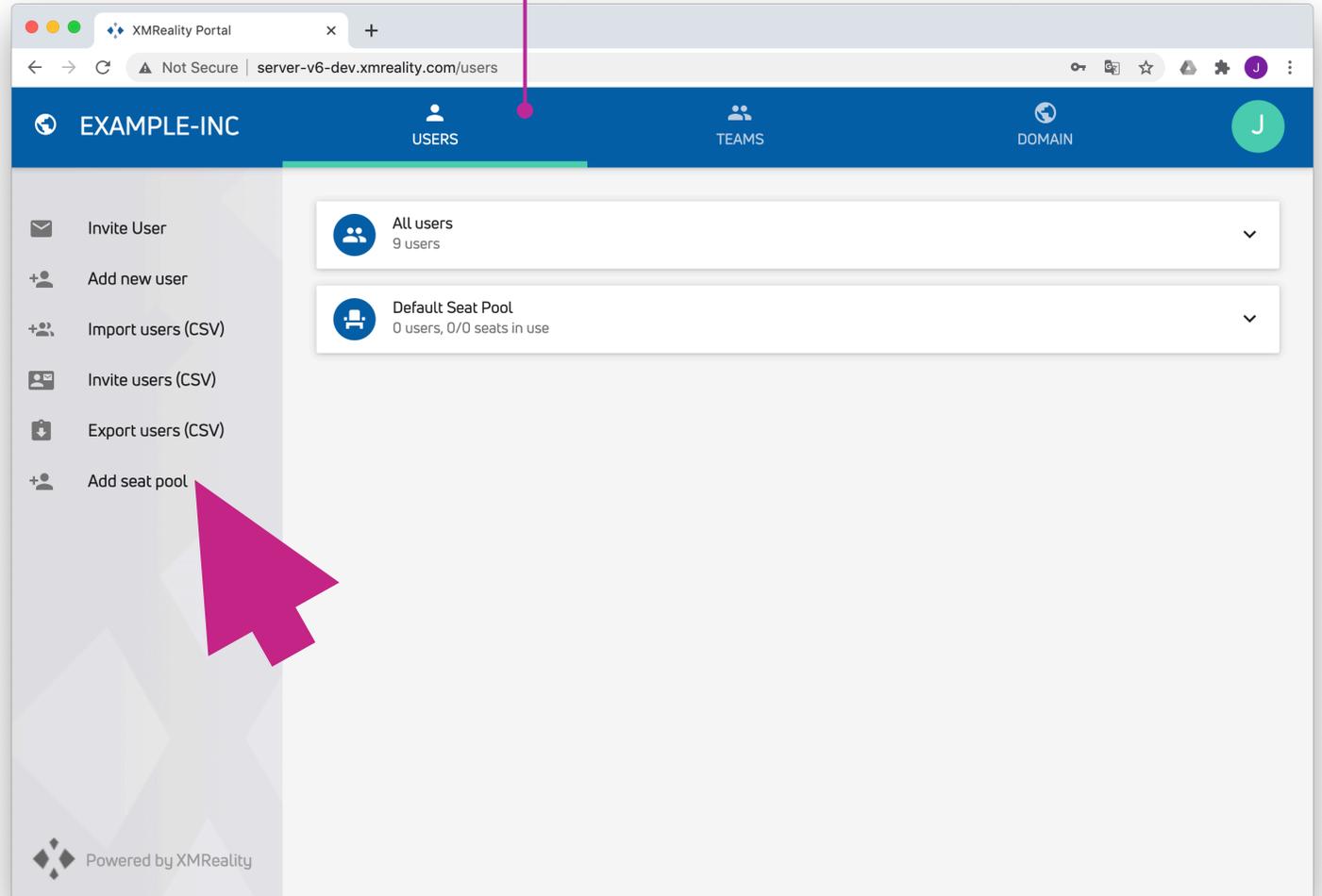
This is the start view with only the “Default Seat Pool”. This seat pool can be used if there isn’t a need to assign different users to groups of seat licenses.

In this case however we want to create a new seat pool by clicking “Add seat pool”.

Please note that seat pools only dictate what seat licenses the users occupy.

They do not control for example what other users are visible in the contact list in the application. This is defined by what Teams the user is assigned to. For more information on Teams see the Administrator manual.

Users tab — Click here to manage seats



Seat Pools

- Invite User
- Add new user
- Import users (CSV)
- Invite users (CSV)
- Export users (CSV)
- Add seat pool

Add seat pool

Name

Seats
0

Available seats
10

To make more seats available, go to settings for an existing seat pool and remove seats.

Automatic Log Off
No automatic log off

ADD SEAT POOL

Name — Enter the name of the pool

Seats — Enter the desired amount of seats assigned to this pool.

Available seats — This is the amount of seats that are available to distribute. If you don't have any available you have to either go to an existing pool and remove seats or buy more licenses.

Automatic log off — Here you can enable automatically logging out users after a period of inactivity.

Automatic log off and inactivity

With automatic log off enabled, a user signed in to the pool will be logged out after the set time if they don't make a call or create a call link.

Each time the user makes a call the timer is reset and started again when the call is finished. When creating a call link the timer is started again when the link is no longer valid. This way it is not possible for a user to be automatically logged off while waiting for a call from a call link.

Seat Pools

Having entered the correct information click add seat pool.

Add seat pool

Name
Field Service

Seats
2

Available seats
8

To make more seats available, go to settings for an existing seat pool and remove seats.

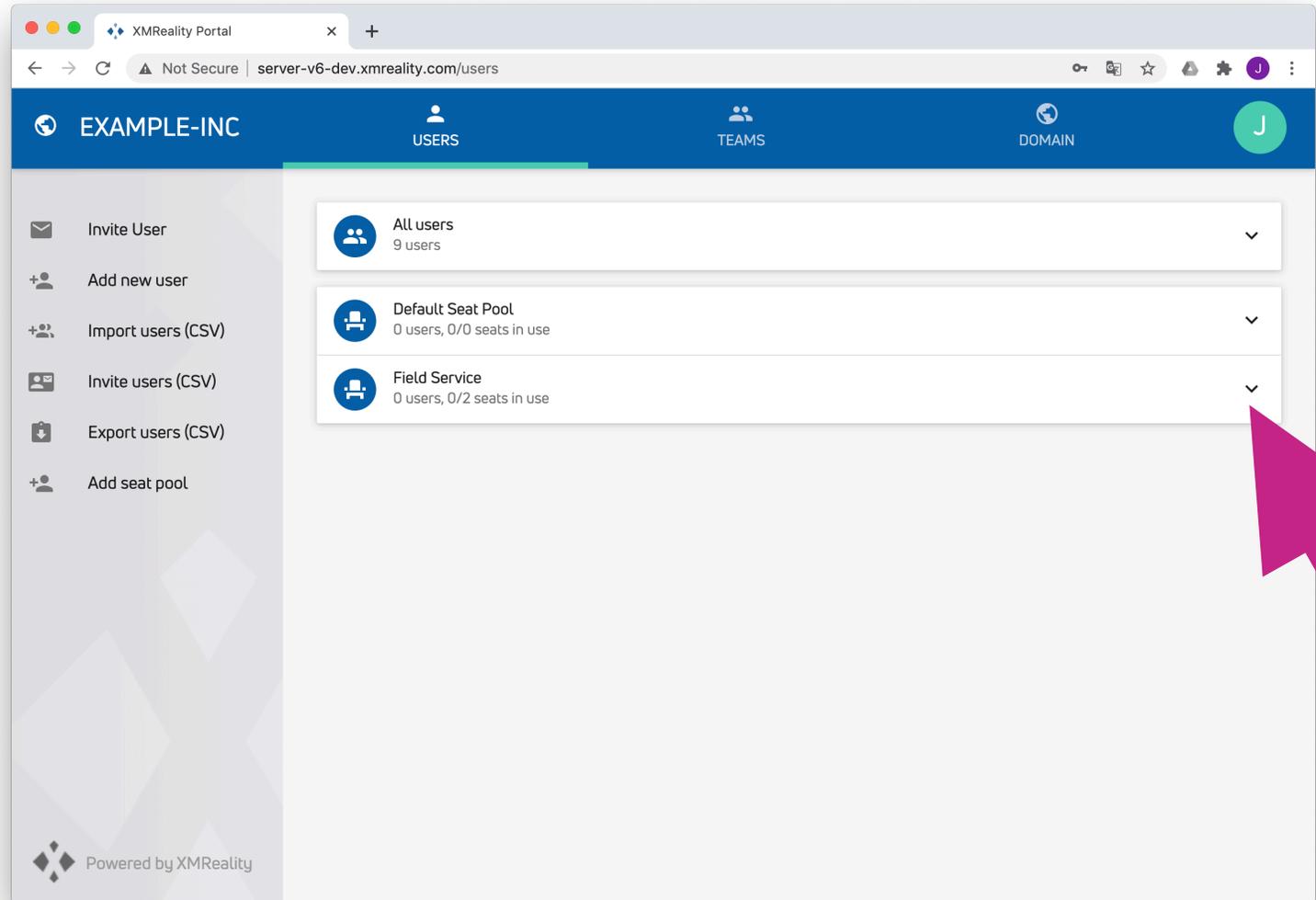
Automatic Log Off
No automatic log off

ADD SEAT POOL

Seat Pools

“Field Service” has now been added to the list of seat pools.

Click the arrow to expand the pool.



Seat Pools

The expanded view shows a section with occupied seats and below a list of users.

The view is empty as we have not yet added any users to the pool.

In the next chapters we will demonstrate how to add new users to the pool and how to move existing users to the pool.

The screenshot shows the XMReality Portal interface for managing users. The browser address bar indicates the URL is `server-v6-dev.xmreality.com/users`. The navigation bar includes 'EXAMPLE-INC', 'USERS', 'TEAMS', and 'DOMAIN'. The sidebar on the left provides actions: 'Invite User', 'Add new user', 'Import users (CSV)', 'Invite users (CSV)', 'Export users (CSV)', and 'Add seat pool'. The main content area displays three seat pools:

- All users**: 9 users
- Default Seat Pool**: 0 users, 0/0 seats in use
- Field Service**: 0 users, 0/2 seats in use

Buttons for 'POOL SETTINGS' and 'DELETE POOL' are visible for the 'Field Service' pool. Below the pools are two empty tables:

USER NAME	EMAIL	LOGGED IN FOR	STATUS	LOG OUT
No occupied seats				

USER NAME	EMAIL	ROLE
No users		

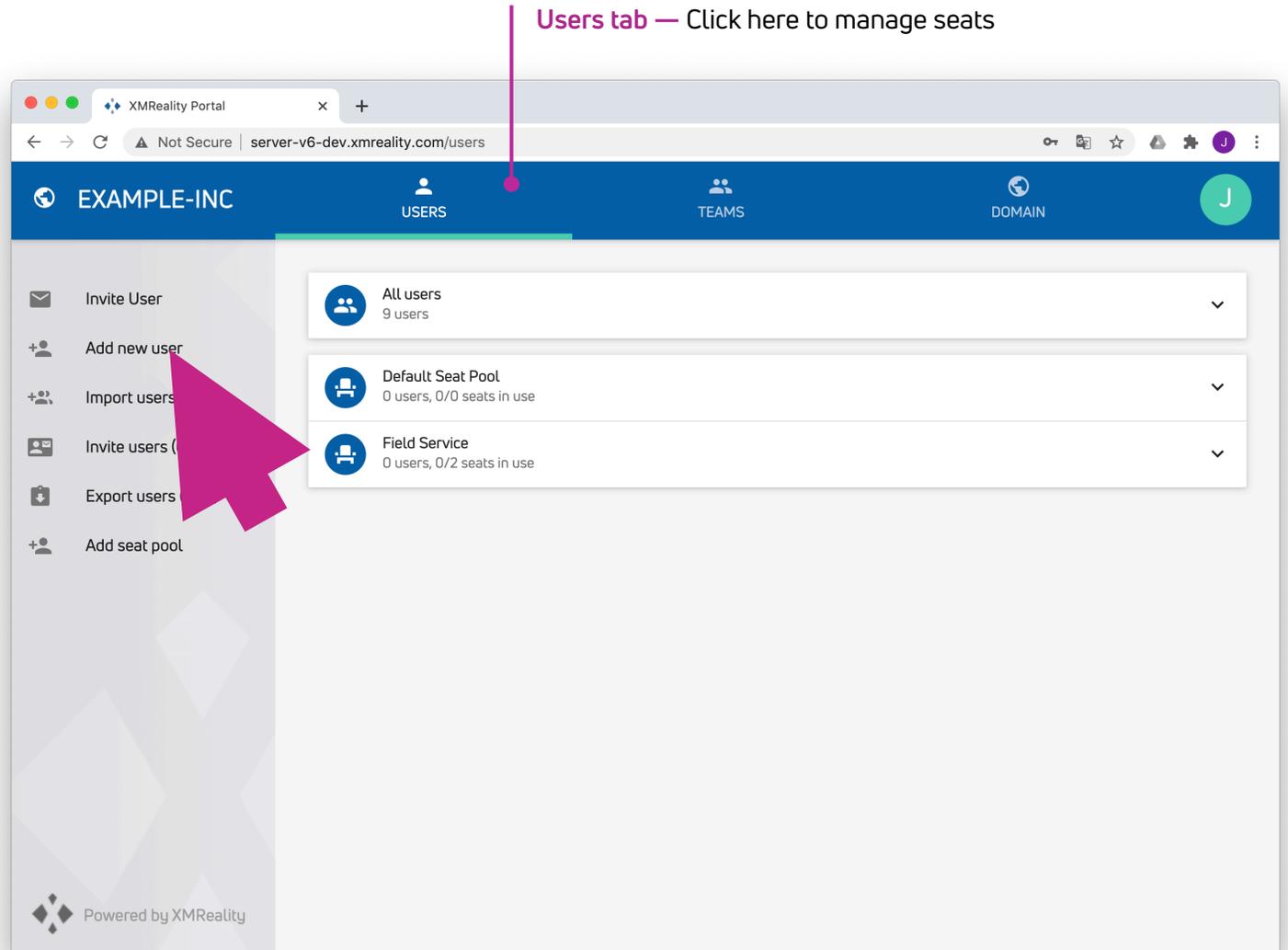
The footer indicates 'Powered by XMReality'.

Adding New Users

Adding New Users

“Invite User” allows you to send an invitation by email where the future user selects name and password and completes the registration.

However in this case we want to directly add a user to the seat pool by clicking “Add new user”.



Adding New Users

- Invite User
- Add new user
- Import users (CSV)
- Invite users (CSV)
- Export users (CSV)
- Add seat pool

Invite User
Import users (CSV)
Invite users (CSV)

The dropdown menus shown here for selecting license model and seat pool are the same when adding new users by the other mechanisms listed above.

Add new user

Email
sven.larsson@example.com

Password
.....

Role
User

Teams
Internal

Can create call links

License model
Seat license

Seat pool
Field Service

ADD USER

License model — Here we have selected Seat license. (This dropdown is only displayed if the domain has both named and seat licenses)

Seat pool — Here we have selected the seat pool that the user will be assigned to. In this case; "Field Service".

With the correct information entered, click "Add user"

Adding New Users

The user Sven Larsson has now been added to the "Field Service" seat pool.

When Sven Larsson logs in to the XMReality application he will now occupy a seat in the "Field Service" pool.

EXAMPLE-INC

USERS TEAMS DOMAIN

- Invite User
- Add new user
- Import users (CSV)
- Invite users (CSV)
- Export users (CSV)
- Add seat pool

All users
10 users

Default Seat Pool
0 users, 0/0 seats in use

Field Service
1 user, 0/2 seats in use

POOL SETTINGS DELETE POOL

OCCUPIED SEATS

USER NAME	EMAIL	LOGGED IN FOR	STATUS	LOG OUT
No occupied seats				

USERS

	USER NAME	EMAIL	ROLE	
<input type="checkbox"/>	Sven Larsson	sven.larsson@example.com	User	

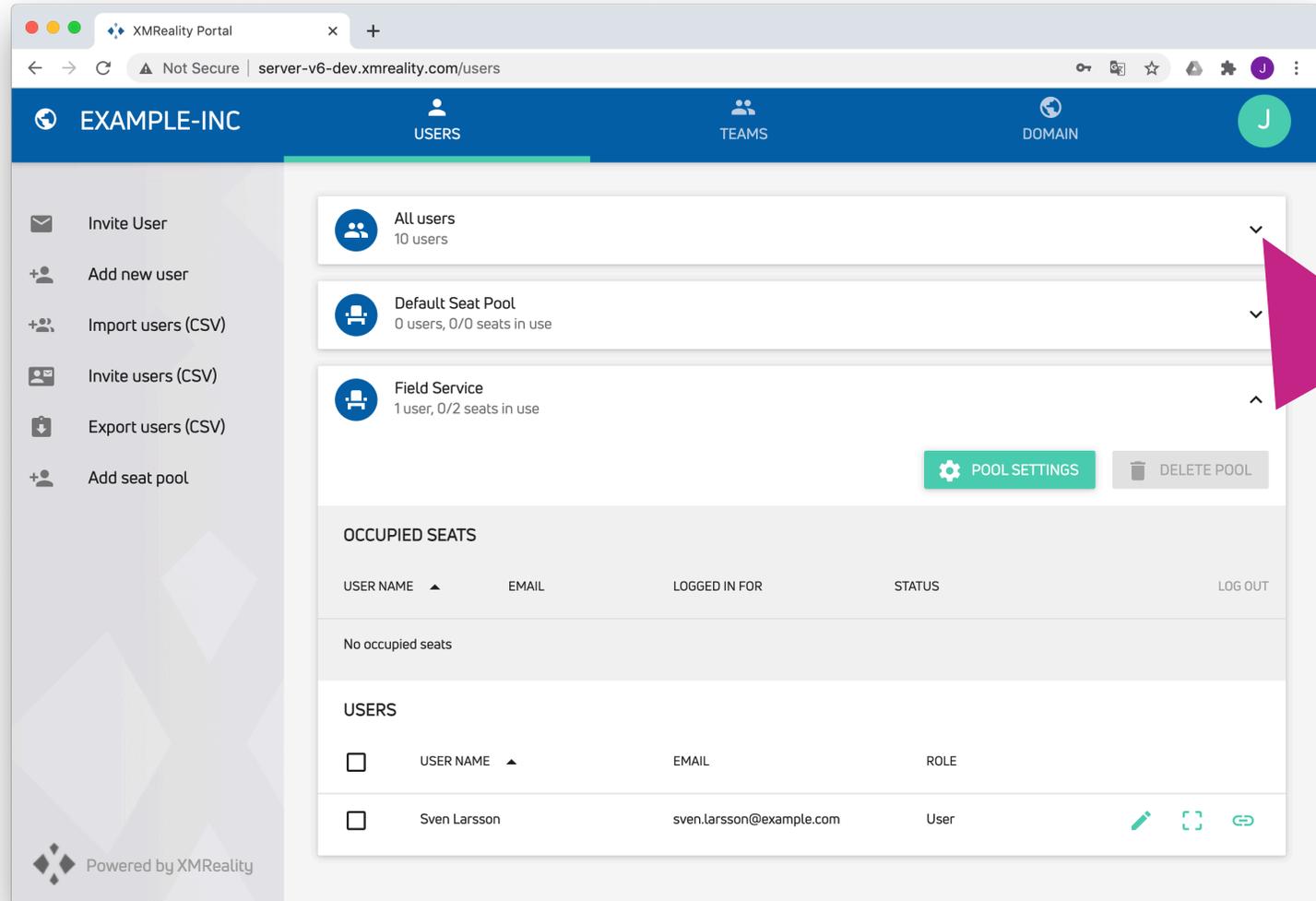
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Moving Existing Users

Moving Existing Users

In addition to the newly added Sven Larsson we also want to move a couple of existing users to the "Field Service" pool.

The users we want to move in this case have named licenses and we can locate them in the "All users" view.



The screenshot shows the XMReality Portal interface. The browser address bar indicates the URL is `server-v6-dev.xmreality.com/users`. The page title is "EXAMPLE-INC". The navigation bar includes "USERS", "TEAMS", and "DOMAIN" tabs, along with a user profile icon labeled "J".

The main content area displays three seat pools:

- All users: 10 users
- Default Seat Pool: 0 users, 0/0 seats in use
- Field Service: 1 user, 0/2 seats in use

Buttons for "POOL SETTINGS" and "DELETE POOL" are visible next to the "Field Service" pool. Below the pools is a section for "OCCUPIED SEATS" with a table showing no occupied seats.

At the bottom, there is a "USERS" section with a table listing users:

	USER NAME	EMAIL	ROLE	
<input type="checkbox"/>	Sven Larsson	sven.larsson@example.com	User	  

Moving Existing Users

To move a single user it is possible to go to the edit user dialog (clicking the pen icon) but in this case we want to move three users at the same time.

We select the users we want to move by clicking the checkboxes next to their names.

The screenshot displays the 'All users' management interface in the XMReality Portal. The page title is 'All users' with a sub-header '10 users'. Below the title is a search bar and two dropdown menus for 'Role' and 'License model'. The main content is a table of users with the following columns: USER NAME, EMAIL, ROLE, LICENSE MODEL, and SEAT POOL. A pink mouse cursor is hovering over the checkbox for Corinne Lafontaine. The left sidebar contains several actions: Invite User, Add new user, Import users (CSV), Invite users (CSV), Export users (CSV), and Add seat pool. The top navigation bar shows 'EXAMPLE-INC', 'USERS', 'TEAMS', and 'DOMAIN'. The bottom left corner of the page has the XMReality logo and the text 'Powered by XMReality'.

<input type="checkbox"/>	USER NAME	EMAIL	ROLE	LICENSE MODEL	SEAT POOL
<input type="checkbox"/>	Carl Berndt	carlberndt@example.com	User	Named license	
<input type="checkbox"/>	Chris Smith	chris.smith@example.com	User	Named license	
<input checked="" type="checkbox"/>	Corinne Lafontaine	corinne.lafontaine@example.com	User	Named license	
<input type="checkbox"/>	Dennis Tresler	dennis.tresler@example.com	User	Named license	
<input type="checkbox"/>	Dustin Walsch	dustin.walsch@example.com	User	Named license	
<input type="checkbox"/>	Janet Collins	janet.collins@example.com	Domain Admin	Named license	
<input type="checkbox"/>	Monica Svensson	monica.svensson@example.com	User	Named license	
<input type="checkbox"/>	Stefan Karlsson	stefan.karlsson@example.com	User	Named license	

Moving Existing Users

We have now selected Carl, Corinne and Monica.

As the next step we click the menu button in the header to open the batch edit menu.

The screenshot displays the XMReality Portal user management interface. The page title is "EXAMPLE-INC" and the navigation bar includes "USERS", "TEAMS", and "DOMAIN". The left sidebar contains options like "Invite User", "Add new user", "Import users (CSV)", "Invite users (CSV)", "Export users (CSV)", and "Add seat pool". The main content area shows a list of users under the heading "All users" (10 users). The list has a search bar and filters for "Role" and "License model". A green bar at the top of the list indicates "3 users selected". The selected users are Carl Berndt, Corinne Lafontaine, and Monica Svensson. A pink arrow points to a menu button (three vertical dots) in the top right corner of the list header.

<input type="checkbox"/>	3 users selected				
<input checked="" type="checkbox"/>	Carl Berndt	carl.berndt@example.com	User	Named license	
<input type="checkbox"/>	Chris Smith	chris.smith@example.com	User	Named license	
<input checked="" type="checkbox"/>	Corinne Lafontaine	corinne.lafontaine@example.com	User	Named license	
<input type="checkbox"/>	Dennis Tresler	dennis.tresler@example.com	User	Named license	
<input type="checkbox"/>	Dustin Walsch	dustin.walsch@example.com	User	Named license	
<input type="checkbox"/>	Janet Collins	janet.collins@example.com	Domain Admin	Named license	
<input checked="" type="checkbox"/>	Monica Svensson	monica.svensson@example.com	User	Named license	
<input type="checkbox"/>	Stefan Karlsson	stefan.karlsson@example.com	User	Named license	

Moving Existing Users

In the menu we select
"Change licensing model".

The screenshot shows the 'EXAMPLE-INC' portal with the 'USERS' section active. The page title is 'All users' with a sub-count of '10 users'. There is a search bar and filters for 'Role' and 'License model'. A table lists the following users:

Selected	Name	Email	Role	License Model	Actions
<input checked="" type="checkbox"/>	Carl Berndt	carl.berndt@example.com	User	Named license	
<input type="checkbox"/>	Chris Smith	chris.smith@example.com	User	Named license	
<input checked="" type="checkbox"/>	Corinne Lafontaine	corinne.lafontaine@example.com	User	Named license	
<input type="checkbox"/>	Dennis Tresler	dennis.tresler@example.com	User	Named license	
<input type="checkbox"/>	Dustin Walsch	dustin.walsch@example.com	User	Named license	
<input type="checkbox"/>	Janet Collins	janet.collins@example.com	Domain Admin	Named license	
<input checked="" type="checkbox"/>	Monica Svensson	monica.svensson@example.com	User	Named license	
<input type="checkbox"/>	Stefan Karlsson	stefan.karlsson@example.com	User	Named license	

The context menu is open, showing the following options:

- Change licensing model
- Add users to team
- Enable users
- Disable users
- Delete users
- Send reset password email
- Enable create call links
- Disable create call link
- Enable personal contacts
- Disable personal contacts

Moving Existing Users

In the subsequent “Change license model” dialog we have the same dropdown menus as in the add/invite user dialog.

Here we select “Seat License” and “Field Service” and confirm the change.

Change license model

- Monica Svensson (monica.svensson@example.com)
- Carl Berndt (carl.berndt@example.com)
- Corinne Lafontaine (corinne.lafontaine@example.com)

License model
Seat license

Seat pool
Field Service

CHANGE LICENSE MODEL

Moving Existing Users

The license model of the three selected users have now been changed from named license to seat license and they have also been assigned to the seat pool "Field Service".

Please note that users that are logged in will be logged out when their license model is changed.

The screenshot displays the 'All users' management page in the XMReality Portal. The table below shows the user data and the changes indicated by pink arrows.

	USER NAME	EMAIL	ROLE	LICENSE MODEL	SEAT POOL	
<input type="checkbox"/>	Carl Berndt	carl.berndt@example.com	User	Seat license	Field Service	←
<input type="checkbox"/>	Chris Smith	chris.smith@example.com	User	Named license		
<input type="checkbox"/>	Corinne Lafontaine	corinne.lafontaine@example.com	User	Seat license	Field Service	←
<input type="checkbox"/>	Dennis Tresler	dennis.tresler@example.com	User	Named license		
<input type="checkbox"/>	Dustin Walsch	dustin.walsch@example.com	User	Named license		
<input type="checkbox"/>	Janet Collins	janet.collins@example.com	Domain Admin	Named license		
<input type="checkbox"/>	Monica Svensson	monica.svensson@example.com	User	Seat license	Field Service	←
<input type="checkbox"/>	Stefan Karlsson	stefan.karlsson@example.com	User	Named license		

Moving Existing Users

If we close the "All users" view and go back to the "Field Service" pool we can now see that the three users have been added to the pool in addition to the previously added "Sven Larsson".

As no user is currently signed in the list of occupied seats is empty.

The screenshot shows the XMReality Portal interface. The browser address bar indicates the URL is `server-v6-dev.xmreality.com/users`. The left sidebar contains navigation options: "Add new user", "Import users (CSV)", "Invite users (CSV)", "Export users (CSV)", and "Add seat pool". The main content area displays two seat pools: "Default Seat Pool" (0 users, 0/0 seats in use) and "Field Service" (4 users, 0/2 seats in use). The "Field Service" pool has "POOL SETTINGS" and "DELETE POOL" buttons. Below the pools is an "OCCUPIED SEATS" section with a table header (USER NAME, EMAIL, LOGGED IN FOR, STATUS, LOG OUT) and a message "No occupied seats". At the bottom is a "USERS" table with columns for checkboxes, USER NAME, EMAIL, and ROLE. The users listed are Carl Berndt, Corinne Lafontaine, Monica Svensson, and Sven Larsson, all with the role "User". Each user row has edit, delete, and link icons.

	USER NAME	EMAIL	ROLE			
<input type="checkbox"/>	Carl Berndt	carl.berndt@example.com	User			
<input type="checkbox"/>	Corinne Lafontaine	corinne.lafontaine@example.com	User			
<input type="checkbox"/>	Monica Svensson	monica.svensson@example.com	User			
<input type="checkbox"/>	Sven Larsson	sven.larsson@example.com	User			

Seat Management

Seat Management

XMReality Portal

server-v6-dev.xmreality.com/users

Default Seat Pool
0 users, 0/0 seats in use

Field Service
4 users, 1/2 seats in use

POOL SETTINGS DELETE POOL

OCCUPIED SEATS

USER NAME	EMAIL	LOGGED IN FOR	STATUS	LOG OUT
Sven Larsson	sven.larsson@ex...		Active	[LOG OUT]

USERS

<input type="checkbox"/>	USER NAME	EMAIL	ROLE	[EDIT]	[REFRESH]	[LINK]
<input type="checkbox"/>	Carl Berndt	carl.berndt@example.com	User	[EDIT]	[REFRESH]	[LINK]
<input type="checkbox"/>	Corinne Lafontaine	corinne.lafontaine@example.com	User	[EDIT]	[REFRESH]	[LINK]
<input type="checkbox"/>	Monica Svensson	monica.svensson@example.com	User	[EDIT]	[REFRESH]	[LINK]
<input type="checkbox"/>	Sven Larsson	sven.larsson@example.com	User	[EDIT]	[REFRESH]	[LINK]

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Occupied Seats — User Sven Larsson has now logged in to the XMReality application and is using one of two seat licenses.

If another user logs in, all seats in this pool will be occupied. The next (third) user in the pool will get an error message when logging in saying there are no available seats.

Pool settings — Click to change name, licenses or automatic log off.

Delete pool — This button is disabled as long as there are users in the pool. To delete the pool, first move or remove all users.

Log out — Click the button to instantly log out the corresponding user. Logged out users will get a notification on their device that they have been logged out.

Status — Here you can see if the logged in user is currently in a call. To get the absolutely latest status, manually refresh the browser window.

Removing Generic Accounts

Removing Generic Accounts

Locate the generic accounts in the "All users" view.

In this case we have located "support@example.com".

Select the account(s) by clicking the checkbox.

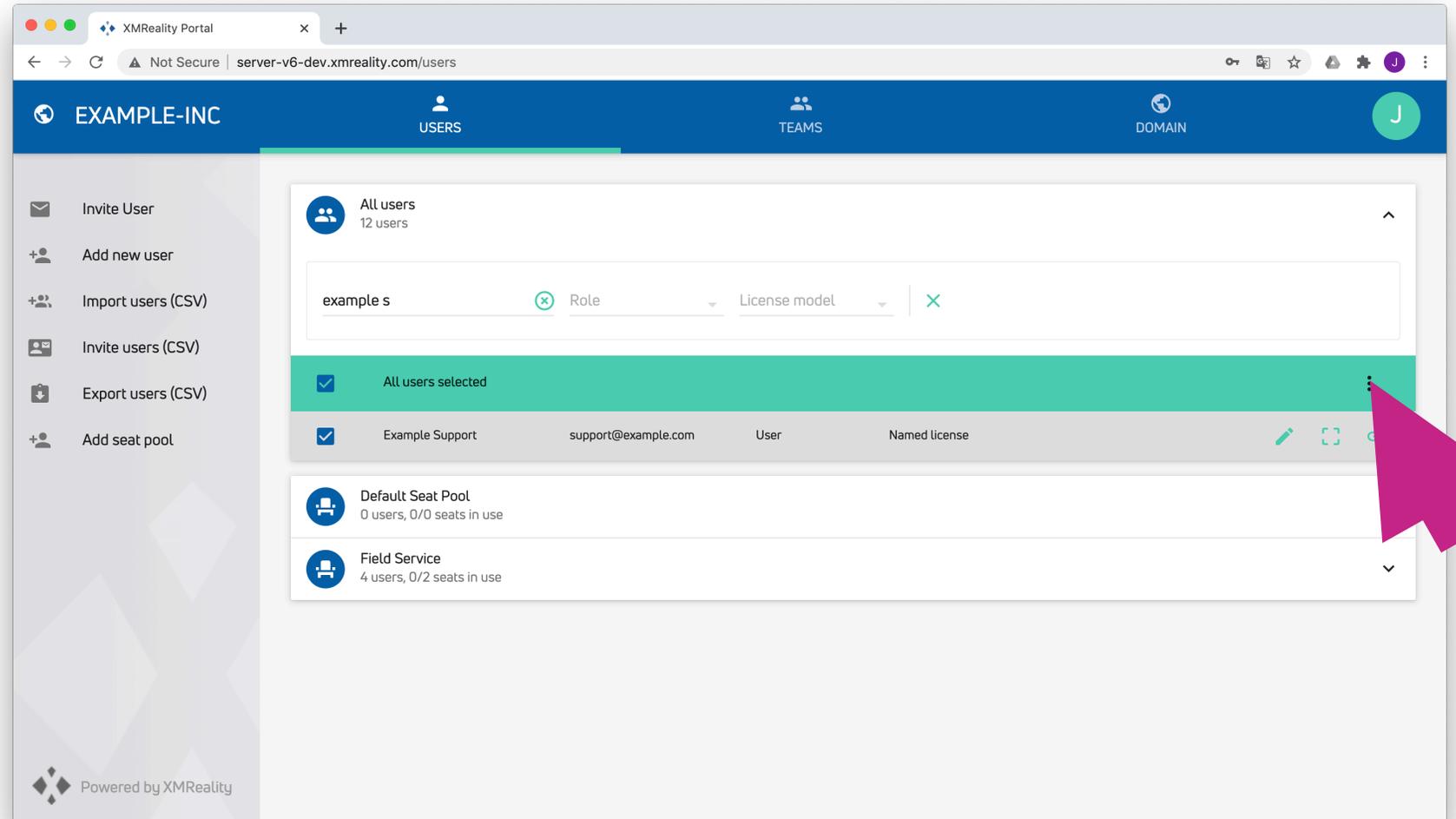
The screenshot shows the XMReality Portal interface. The top navigation bar includes 'EXAMPLE-INC', 'USERS', 'TEAMS', and 'DOMAIN'. A sidebar on the left contains options like 'Invite User', 'Add new user', 'Import users (CSV)', 'Invite users (CSV)', 'Export users (CSV)', and 'Add seat pool'. The main content area displays the 'All users' view with a search bar containing 'example s'. Below the search bar is a table of users:

<input type="checkbox"/>	USER NAME ▲	EMAIL	ROLE	LICENSE MODEL	SEAT POOL	
<input type="checkbox"/>	Example Support	support@example.com	User	Named license		

A pink arrow points to the checkbox in the first row of the table. Below the table, there are sections for 'Seat Pool' and 'Device', each with a dropdown arrow.

Removing Generic Accounts

With the account(s) selected open the menu.



The screenshot shows the XMReality Portal interface. The top navigation bar includes 'EXAMPLE-INC', 'USERS', 'TEAMS', and 'DOMAIN'. A sidebar on the left contains options: 'Invite User', 'Add new user', 'Import users (CSV)', 'Invite users (CSV)', 'Export users (CSV)', and 'Add seat pool'. The main content area displays a list of users under the heading 'All users' (12 users). A search filter is applied with 'example s'. A table shows one user selected: 'Example Support' (support@example.com, User, Named license). A green bar above the table indicates 'All users selected'. A pink arrow points to the three-dot menu icon on the right side of the table row.

Selected	Name	Email	Role	License Model	Actions
<input checked="" type="checkbox"/>	Example Support	support@example.com	User	Named license	[Edit] [Copy]

Removing Generic Accounts

Click "Delete users" to delete the account(s).

The screenshot shows the XMReality Portal interface for 'EXAMPLE-INC' in the 'USERS' section. The page displays a list of users under the heading 'All users' (12 users). A search filter 'example s' is applied. A table of users is shown with the following data:

Selected	Name	Email	Role	License Model
<input checked="" type="checkbox"/>	All users selected			
<input checked="" type="checkbox"/>	Example Support	support@example.com	User	Named license

Below the table, there are two seat pool sections:

- Default Seat Pool: 0 users, 0/0 seats in use
- Field Service: 4 users, 0/2 seats in use

A context menu is open over the table, listing various actions. The 'Delete users' option is highlighted, and a pink arrow points to it. Other options in the menu include: Change licensing model, Add users to team, Enable users, Disable users, Send reset password email, Enable create contacts, Disable create contacts, Enable personal contacts, and Disable personal contacts.