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Milestone Systems

XProtect® Transact 2024 R2

User manual

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Configuring XProtect Transact

Before you start observing and investigating your transactions in XProtect Smart Client, you need to:

1. Verify that your XProtect Transact base license has been activated during installation of the VMS. To do this, open XProtect Smart Client and check that the **Transact** tab is visible. Even if you do not have a base license, you can still use XProtect Transact with a trial license. For more information, see XProtect Transact trial license on page 4.

2. Verify that transactions are displayed correctly. This includes the individual transaction lines and receipts. To do this, click the **Transact** tab and select a transaction source and a time interval. If configured correctly, a list of transaction lines appear, and if you click a line, the corresponding video still frame is displayed, one for each connected camera.

3. Set up a view for transactions, if you want to observe real time transactions in live mode or investigate transactions in playback mode. For more information, see Set up views for transactions on page 4.

XProtect Transact trial license

With an XProtect Transact trial license, you can try out the XProtect Transact functionality for up to 30 days. All related features are enabled, and you can add one transaction source, for example a cash register. When the 30 days trial period expires, all XProtect Transact features are deactivated, including the **Transact** workspace and transaction view items. By purchasing and activating an XProtect Transact base license and the transaction source licenses you need, you can use XProtect Transact again, and your settings and data are maintained.

You must acquire the trial license from Milestone. The system administrator must activate the trial license in the configuration.

Set up views for transactions

Before viewing transactions in live or playback mode, you need to set up a view where you include a transaction view item for each transaction source. In case of ongoing transactions, the receipts roll over the screen inside the view item when you leave the setup mode.

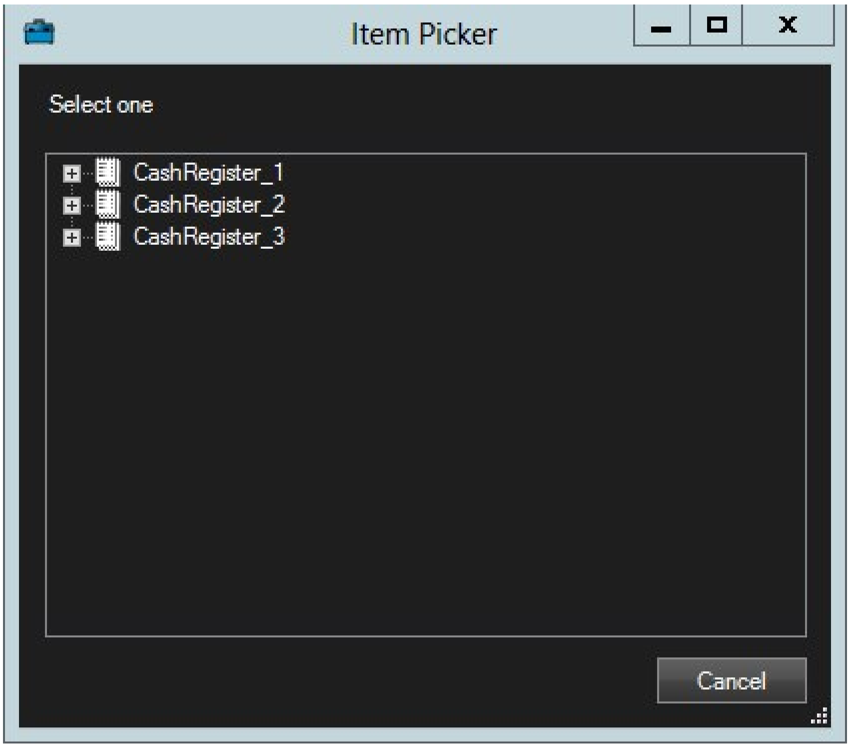
Steps:

1. In live or playback mode, click **Setup** in the upper right corner to enter the setup mode.

2. Create a new view or select an existing one.

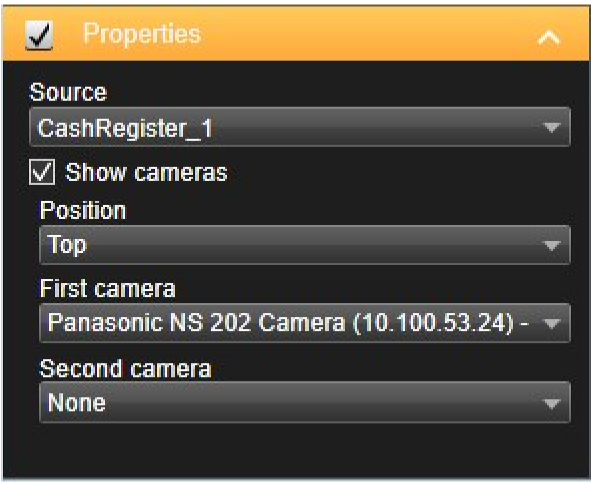
3. Expand the **System overview** pane.

4. Drag and drop the **Transact** item into the view item, where you want the transactions and video feed to be displayed. A pop-up window appears.



5. Select a transaction source, for example a cash register, and click **OK**. A receipt preview is displayed inside the view item.

6. Expand **Properties** and select the **Show cameras** check box to add cameras associated with the transaction source. By default, the first camera added to the transaction source in the configuration is selected.



7. Use the **First camera** and **Second camera** drop-down lists to specify which cameras are displayed in the view item. By default, no second camera is selected. If you do not want a second camera, leave it as is.

8. If you want to change the position of the cameras, select a value in the **Position** drop-down list, for example to the left of the receipt.

> For each transaction view item you want to add to the view, repeat steps 4-8.

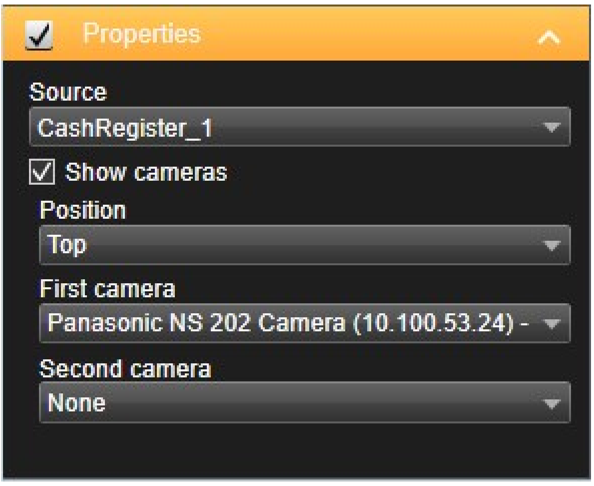
Adjust settings for transaction view items

Once you have created a view that includes one or more transaction view items, you can:

- Change the cameras selected and their display order. You can select maximum two cameras per transaction view item, and only cameras associated with the transaction source
- Change how the cameras are positioned in relation to the receipt
- Add (or remove) transaction view items

Steps:

1. In live or playback mode, click **Setup** in the upper right corner to enter the setup mode.
2. Select the view and then the view item you want to adjust.
3. To modify the cameras selected or their position, expand **Properties** and verify that the **Show cameras** check box has been selected.



4. Use the **Position** drop-down list to specify how the camera or cameras are displayed in relation to the receipt, for example below the receipt.
5. Use the **First camera** and **Second camera** drop-down lists to change which cameras are displayed in the view item.
6. If you want to add a transaction source to the view, follow steps 3-8 in Set up views for transactions on page 4.

Troubleshooting: XProtect Transact

Error messages and warnings

Failed to retrieve transaction data from the event server.

The event server is not running or not responding, or the connection to the server has been lost.

There is an internal error on the event server or in the associated database. This may include issues with the connection to the database. To resolve this issue, please contact your system administrator.

Your search timed out before completion. Try narrowing your search by shortening the search period.

There is an internal error on the event server or in the associated database. This may include issues with the connection to the database. To resolve this issue, please contact your system administrator.

Viewing transactions

Using XProtect Transact

If XProtect Transact has been configured in your system, you can observe live transactions, investigate transactions in several ways, and print transactions.

Tabs with XProtect Transact functionality

This topic gives you an overview of what you can do with XProtect Transact in XProtect Smart Client. The features are described according to the tabs.

Tab	Description
Views tabs	On the views tabs, you can view live and recorded video with transactions. In live mode, you can observe live transactions and surveillance video from the cameras monitoring the transactions. The view can contain several transaction view items, where transactions are displayed as receipts that roll over the screen in sync with the video stream from up to two cameras. In playback mode, you can browse recorded transactions and surveillance video from the cameras monitoring the transactions. The view can contain several transaction view items, where transactions are displayed as receipts that roll over the screen in sync with the video stream from up to two cameras. You create and modify the transaction views in setup mode.
Alarm Manager	On the **Alarm Manager** tab, you can view and investigate events and alarms related to transactions. The events are displayed in the event list. To group transaction events, you need to filter for events of the type transaction. When you click a line in the event list, the video associated with the event is displayed in a preview.
Transact	On the **Transact** tab, you can investigate transactions by performing free text searches and applying filters. The transaction lines appear in a list that you can sort by time, transaction source, and line name. When clicking a line, the associated video still frames from the associated cameras are displayed. Below the preview area, the receipt is displayed.

Observe live transactions

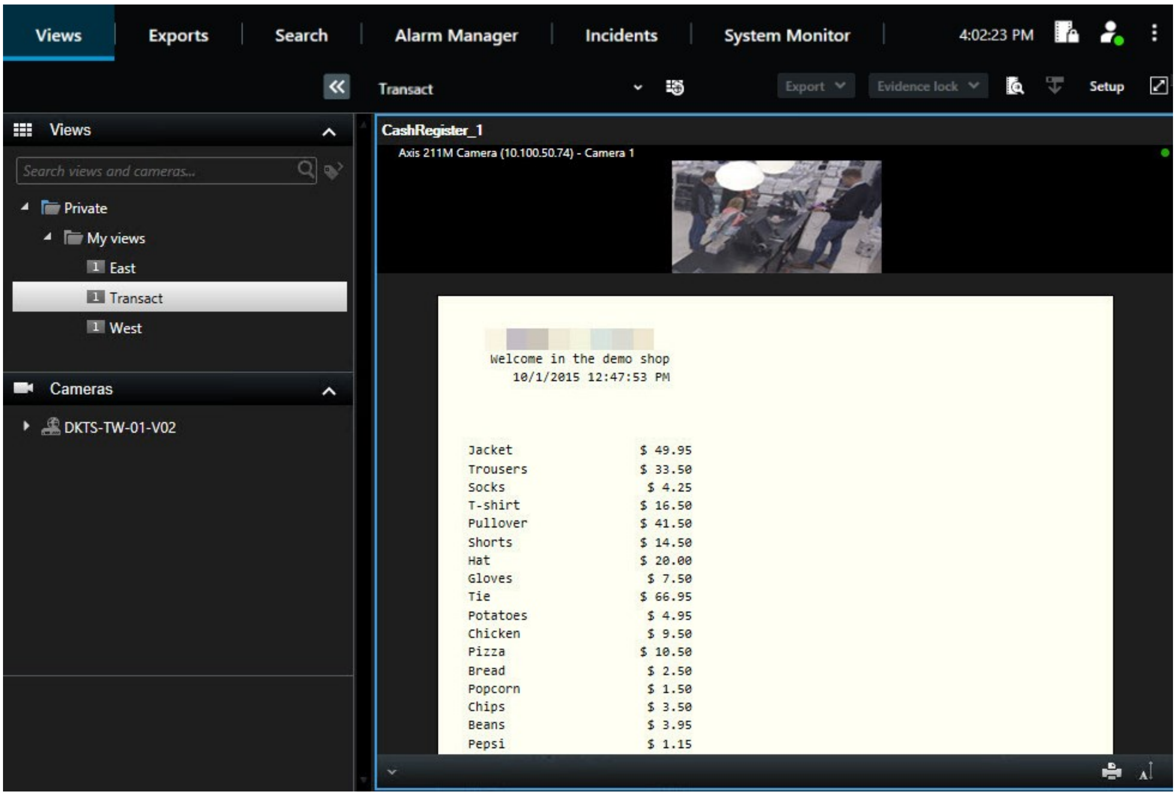
You can observe real time transactions in combination with live video surveillance from the cameras recording the transactions. For example, you may want to observe a cash register, the sales clerk, and the ongoing transactions.

Requirements

You have set up a view to display transactions. For more information, see Set up views for transactions on page 4.

Steps:

1. In live mode, expand the **Views** pane.
2. Select a view set up for transactions. Receipts roll over the screen if there are ongoing transactions, and the live video from the associated cameras are displayed.



If the transaction view item is narrower than the receipt, a horizontal scroll bar allows you to view the part of the receipt that is hidden. If you try to access the scroll bar, the view item toolbar appears covering the scroll bar. To access the scroll bar, press and hold down **Ctrl** while moving the cursor into the view item area.

Select  to change the font size of receipts.

Investigating transactions

Investigate transactions in a view

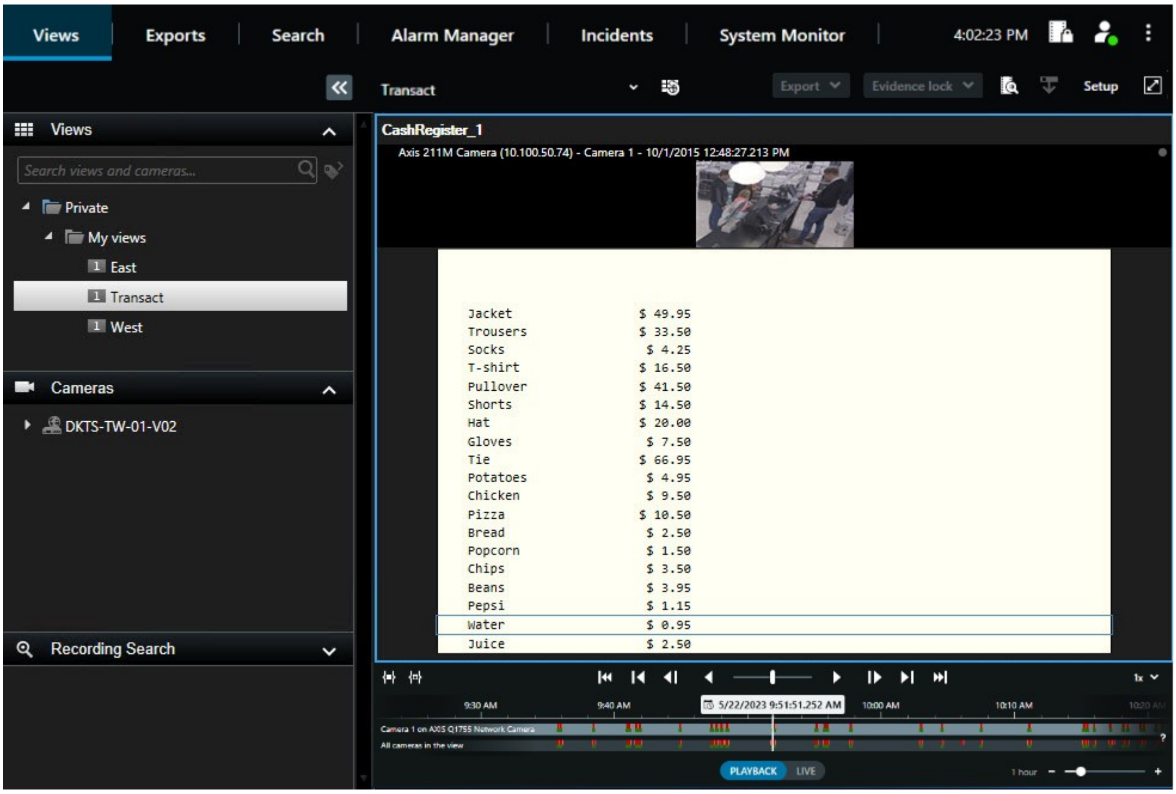
The simplest method of investigating transactions is to view transactions in a view, where the receipts roll over the screen in sync with the video recordings.

Requirements

You have set up a view to display transactions. For more information, see Set up views for transactions on page 4.

Steps:

1. Select the relevant view and switch to playback mode.
2. In the **Views** pane, select the transaction view. Depending on how the view has been configured, one or more receipts appear together with the cameras associated with the transaction source.



3. To browse the video sequences in backward mode, drag the time line to the right.
4. To browse the video sequences in forward mode, drag the time line to the left.
5. Use the or button to play the video backwards or forwards.

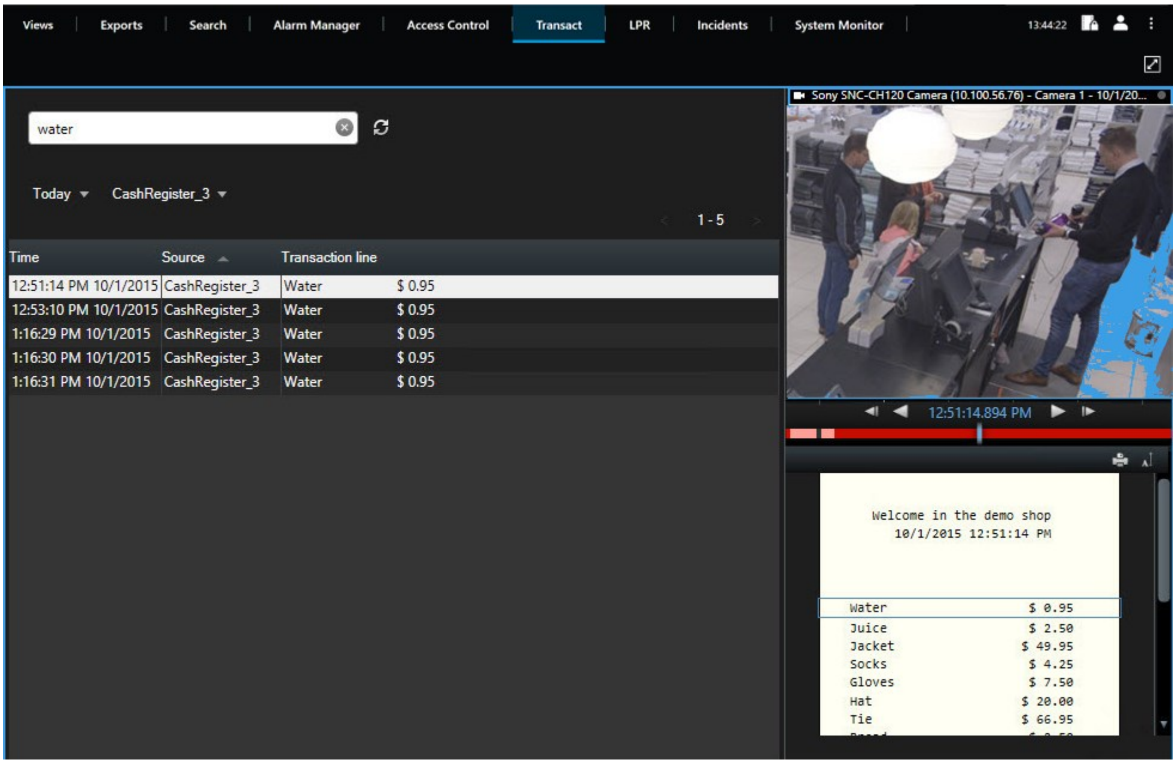
> If the transaction view item is narrower than the receipt, a horizontal scroll bar allows you to view the part of the receipt that is hidden. If you try to access the scroll bar, the view item toolbar appears covering the scroll bar. To access the scroll bar, press and hold down **Ctrl** while moving the cursor into the view item area.

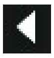
> Select to change the font size of receipts.

Investigate transactions using search and filters

You can investigate transactions and the associated video recordings by using filters and search words. The filters help you narrow down your search, for example transactions from the last seven days, or a specific cash register. Search words help you identify specific data from the transactions, for example the name of the sales clerk or unauthorized discounts.

1. Click the **Transact** tab.
2. In the **Today** drop-down list, select a time interval.
3. In the **Source** drop-down list, select the transaction sources you want to investigate. Disabled sources are marked with "()", for example "(CashRegister_3)".



4. Enter your search words. The search results are displayed as transaction lines below the filters, and in the receipt, the search item is highlighted.
5. To update the list, click .
6. Click a transaction line to view the associated video still frame. Use the  or  button to start the video in backward play or forward play mode.

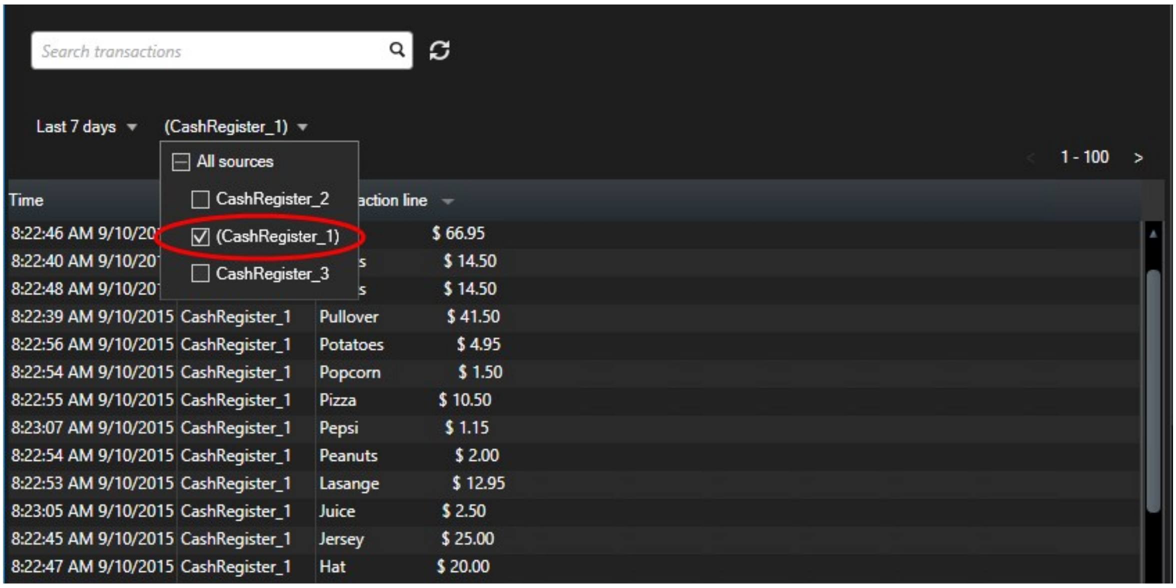
> By default, transaction data is stored for 30 days, but depending on the configuration, data can be stored up to 1000 days.

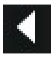
Investigate transactions from a disabled source

Even if a transaction source has been disabled by your system administrator, you can still view past transactions from that source in combination with the associated video recordings.

Steps:

1. Click the **Transact** tab.
2. In the **All sources** drop-down list, select a disabled transaction source. Parentheses indicate that the source is disabled, for example "(CashRegister_1)".



3. Select a time interval, for example **Last 7 days**, or set a custom interval.
4. Click  to view the transaction lines for the specified time interval.
5. Select a transaction line to view the associated video still frame from that exact point in time.
6. Use the  or  button to play the video backwards or forwards.

> By default, stored transaction data is deleted after 30 days. However, your system administrator may have changed the retention period to anything between 1 and 1000 days.

Investigate transaction events

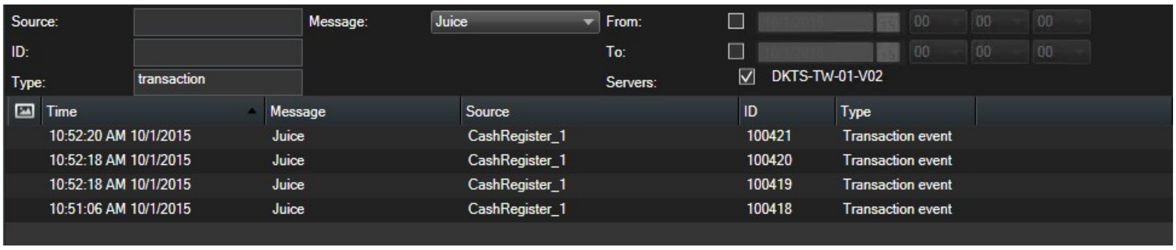
You can investigate transaction events, for example by identifying transactions where a specific item has been purchased. Investigating a transaction event involves viewing the details about the event in the alarm list and the associated video recordings.

Requirements

To filter by transaction events, the **Type** field must be added to XProtect Smart Client. This can only be done by your system administrator.

Steps:

1. Click the **Alarm Manager** tab.
2. Click **Setup** in the upper right corner to enter the setup mode.
3. Expand the **Properties** pane.
4. In the **Data Source** list, select **Event** and click **Setup** again to exit the setup mode. All events are displayed in a list with the most recent at the top.
5. To view only the transaction events, expand the **Filter** section and enter **transaction event** in the **Type** field. Automatically the filter is applied, and only transaction events appear in the list.



6. If you want to view a specific event defined by your system administrator, open the **Message** list and select the event.
7. To view the video recordings associated with an event, click the event in the list. The video starts playing in the preview area.

Investigate transaction alarms

You can investigate alarms that have been triggered by transaction events. The alarms appear in the alarm list, where you can view the details about the alarm and the associated video recordings.

Requirements

To filter by transaction events, the **Type** field must be added to XProtect Smart Client. This can only be done by your system administrator.

Steps:

1. Click the **Alarm Manager** tab.
2. Click the **Setup** button in the upper right corner to enter the setup mode.
3. Expand the **Properties** pane.
4. In the **Data Source** list, select **Alarm** and click **Setup** again to exit the setup mode. The most recent alarms are displayed at the top.
5. To view only the alarms triggered by transaction events, expand the **Filter** section and enter **transaction event** in the **Type** field. Automatically the filter is applied to the list.

6. To view alarms triggered by a specific event, open the **Message** list and select the event.

7. To view the video recordings associated with an alarm, click the alarm in the list. The video starts playing in the preview area.

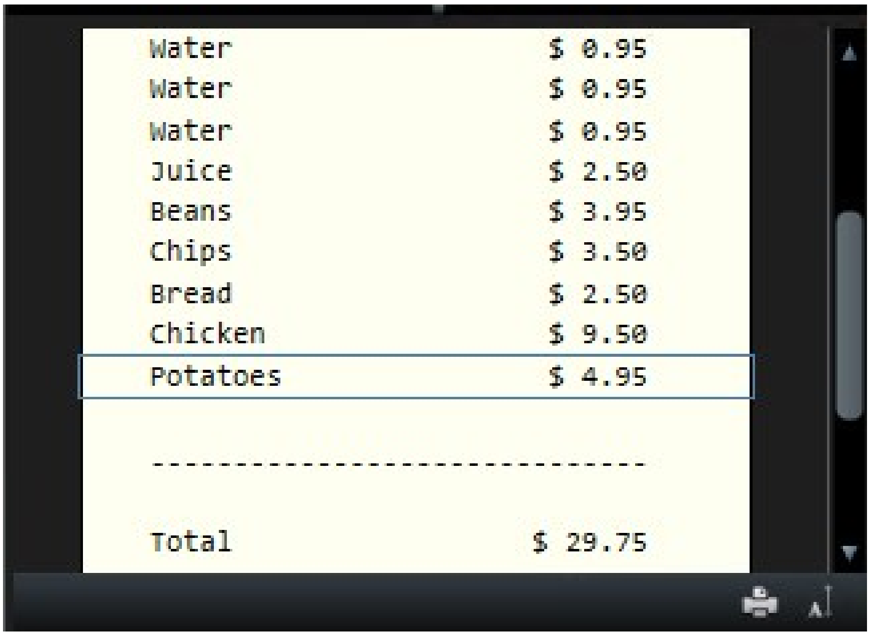
Print transactions

When you are viewing transactions in the **Transact** workspace, you can print the transactions, one at a time. The printout displays the receipt and still images from the associated cameras at the time matching the transaction line.

Steps:

1. Click the **Transact** tab.

2. Find the transaction you want to print as described in Investigating transactions on page 10.



3. Click **Print** below the transaction to print it. A Windows dialog box appears.

4. Select the required printer and click **OK**.

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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/.