MAKE THE WORLD SEE

# **Milestone Systems**

XProtect® Transact 2025 R2

User manual



# Contents

Copyright, trademarks, and disclaimer	3
Overview	4
XProtect Transact for operators	4
Adding transactional data to your views	5
Configuring XProtect Transact	5
XProtect Transact trial license	5
Set up views for transactions	5
Adjust settings for transaction view items	7
Troubleshooting: XProtect Transact	8
Error messages and warnings	8
Viewing transactions	9
Using XProtect Transact	9
Tabs with XProtect Transact functionality	9
Observe live transactions	10
Investigating transactions	11
Investigate transactions in a view	11
Investigate transactions using search and filters1	12
Investigate transactions from a disabled source	13
Investigate transaction events	14
Investigate transaction alarms	15
Print transactions	16

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# **Overview**

## **XProtect Transact for operators**

XProtect Transact is an extension to Milestone's IP video surveillance solutions that lets you observe ongoing transactions and investigating transactions in the past. The transactions are linked with the digital surveillance video monitoring the transactions, for example to help you prove fraud or provide evidence against a perpetrator. There is a 1-to-1 relationship between the transaction lines and video images.



The transaction data may originate from different types of transaction sources, typically point of sales (PoS) systems or automated teller machines (ATM). When selecting a transaction line, a video still frame from each of the associated cameras is displayed in a preview area that allows you to review the recordings. Below the preview area, the transaction associated with the selected line is displayed as a receipt.

# Adding transactional data to your views

## **Configuring XProtect Transact**

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

- 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 5.
- 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 5.

## **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.

- 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.

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		Cancel .:

- 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.

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Panasonic NS 202 Camera (10.100.53.24) -	v
Second camera	
None	¥

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

- 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.

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- 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 5.

## **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 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 <b>Alarm Manager</b> 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 <b>Transact</b> 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 5.

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.

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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.



## 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 5.

- 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.

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Pizza       \$ 10.50         Bread       \$ 2.50         Popcorn       \$ 1.50         Chips       \$ 3.50         Beans       \$ 3.95         Pepsi       \$ 1.15         Water       \$ 0.95         Juice       \$ 2.50         Popconding Search       Image: Search         Chips       \$ 2.50         Pass AM       940 AM         Statement in AVS 01755 Memory Crimera       Image: Search         All contexts in Packet       Image: Search		Potatoes				
Bread       \$ 2.50         Popconn       \$ 1.50         Chips       \$ 3.50         Beans       \$ 3.50         Beans       \$ 3.95         Pepsi       \$ 1.15         Water       \$ 0.95         Juice       \$ 2.50         Phile       Image: All and a		Chicken	\$ 9.50			
Q. Recording Search         Popcorn         \$ 1.50           Q. Recording Search         Water         \$ 0.95           Juice         \$ 2.50		Pizza	\$ 10.50			
Chips       \$ 3.50         Beans       \$ 3.95         Pepsi       \$ 1.15         Water       \$ 0.95         Juice       \$ 2.50         Image: State of the law       Image: State of the law         930 AM       940 AM         940 AM       940 AM		Bread	\$ 2.50			
Q. Recording Search		Popcorn	\$ 1.50			
Pepsi         \$ 1.15           Water         \$ 0.95           Juice         \$ 2.50           Image: Constraint of the low         Image: Constraint of the low		Chips	\$ 3.50			
Water         \$ 0.95           Juice         \$ 2.59           Image: State of the control of		Beans	\$ 3.95			
Q         Recording Search         Juice         \$ 2.58           Image: Search         Image: Search         Image: Search         Image: Search           930 AM         940 AM         Image: Search         Image: Search           930 AM         940 AM         Image: Search         Image: Search           All commers to the same         Image: Search         Image: Search         Image: Search		Pepsi	\$ 1.15			and the second se
State         State <th< td=""><td></td><td>Water</td><td>\$ 0.95</td><td></td><td></td><td></td></th<>		Water	\$ 0.95			
9.30 AM 940 AM 05 5/22/2023 95151.252 AM 10:00 AM 10:10 AM Crimical 1 (nk.x/5 5/1755 Namon Crimical 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2	Recording Search 🗸	Juice	\$ 2.50			
Constant Con AVX5 C(1755 Non-on Constant Constan		(=) (n)	IH IA AI A -	— <b>↓</b> →	▶I ₩I	1x 🛩
All comeas in the view 0. 0. 0.000 (0		9:30 AM	9:40 AM	/2023 9:51:51.252 AM	AM 10:10	AM 1020 AI
		Camera 1 on AXIS Q1755 Network Camera			111	T RITHUL
		All cameras in the view	1 00 1 000			
PLAYBACK LIVE 1 hour			PI	AYBACK LIVE		hour +

- 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 **M** 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)".

Views Exports	Search	Alarm Manager	Access Control	Transact	LPR	Incidents	System Monitor	13;44:22
								Į.
water		8	3				Sony SNC-CH120 Camera (	10.100.56.76) - Camera 1 - 10/1/20
Today 🔻 CashRo	egister_3 ▼					1-5 >	END	
Time	Source 🔺	Transaction line						1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
12:51:14 PM 10/1/2015	CashRegister 3	Water	\$ 0.95					
12:53:10 PM 10/1/2015		Water	\$ 0.95					
1:16:29 PM 10/1/2015		Water	\$ 0.95					
:16:30 PM 10/1/2015		Water	\$ 0.95					
1:16:31 PM 10/1/2015		Water	\$ 0.95					1200-1
							◀ ◀ 12:5	1-14 894 DM
							◄! ◀ 12:5	1:14.894 PM 🕨 🕨
								÷.
								e .
								the demo shop
							10/1/201	5 12:51:14 PM
							Water	\$ 0.95
							Juice	\$ 2.50
							Jacket	\$ 49.95
							Socks	\$ 4.25
							Gloves	\$ 7.50
							Hat	\$ 20.00
							Tie	\$ 66.95
							38 - 202829-80.	

- 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 solution 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.

- 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)".

Search transactio		Q	S			
Search transactio	ns	4	, S			
Last 7 days 🔻	(CashRegister_1) 🔻					
	All sources				< 1 - 100	2
Time	CashRegister	_2 action	ine 👻			
8:22:46 AM 9/10/20	✓ (CashRegiste	r_1)	\$ 66.95			
8:22:40 AM 9/10/20		-	\$ 14.50			
8:22:48 AM 9/10/20	CashRegister	_3 _5	\$ 14.50			
8:22:39 AM 9/10/201	5 CashRegister_1	Pullover	\$ 41.50			
8:22:56 AM 9/10/201	5 CashRegister_1	Potatoes	\$ 4.95			
8:22:54 AM 9/10/201	5 CashRegister_1	Popcorn	\$ 1.50			
8:22:55 AM 9/10/201	5 CashRegister_1	Pizza	\$ 10.50			
8:23:07 AM 9/10/201	5 CashRegister_1	Pepsi	<b>\$</b> 1.15			
8:22:54 AM 9/10/201	5 CashRegister_1	Peanuts	\$ 2.00			
8:22:53 AM 9/10/201	5 CashRegister_1	Lasange	\$ 12.95			
8:23:05 AM 9/10/201	5 CashRegister_1	Juice	\$ 2.50			
8:22:45 AM 9/10/201	5 CashRegister_1	Jersey	\$ 25.00			
8:22:47 AM 9/10/201	5 CashRegister_1	Hat	\$ 20.00			

- 3. Select a time interval, for example Last 7 days, or set a custom interval.
- 4. Click Stoview 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.

- 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.

Source:			Message:	Juice	<ul> <li>From:</li> </ul>		15 <b>16 16 16 16</b> 00 -	
ID:					To:		00 -	
Type:		transaction			Servers:	DKTS-	TW-01-V02	
🖾 Tin	ne		<ul> <li>Message</li> </ul>	Source		ID	Туре	
10	:52:20 AM 1	0/1/2015	Juice	CashRegister_1		100421	Transaction event	
10	:52:18 AM 1	0/1/2015	Juice	CashRegister_1		100420	Transaction event	
10	:52:18 AM 1	0/1/2015	Juice	CashRegister_1		100419	Transaction event	
10	:51:06 AM 1	0/1/2015	Juice	CashRegister_1		100418	Transaction event	

- 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.

- 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.

- 1. Click the **Transact** tab.
- 2. Find the transaction you want to print as described in Investigating transactions on page 11.

Water	\$ 0.95
Water	\$ 0.95
Water	\$ 0.95
Juice	\$ 2.50
Beans	\$ 3.95
Chips	\$ 3.50
Bread	\$ 2.50
Chicken	\$ 9.50
Potatoes	\$ 4.95
Total	\$ 29.75

- 3. Click **Print** below the transaction to print it. A Windows dialog box appears.
- 4. Select the required printer and click **OK**.



# 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/.

