

**Milestone Systems**

XProtect<sup>®</sup> Transact

Users Manual



The Open Platform Company



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## Target audience

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This document is intended for end users who solely use Milestone XProtect Transact for browsing transaction data and video recordings. This document describes how to browse transaction data and video recordings together using the the XProtect Smart Client.

This document does not explain how to install and configure Milestone XProtect Transact as an add-on to a Milestone XProtect surveillance system. Such installation and configuration of Milestone XProtect Transact is covered in a separate Milestone XProtect Transact Administrator's Manual.

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**3rd\_party\_software\_terms\_and\_conditions.txt** located in your Milestone surveillance system installation folder.



## Introduction

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Milestone XProtect Transact is a powerful tool for tracking transactions linked with video recordings of the transactions taking place.

Milestone XProtect Transact is an add-on to Milestone's IP video surveillance solutions XProtect Basis+, XProtect Professional, XProtect Enterprise and XProtect Corporate. Milestone XProtect Transact can combine your digital video monitoring with transaction data from many kinds of transaction data sources and for many purposes. You get a 1-to-1 correspondence of images to transactions and the transaction data is time-linked with simultaneous display of transactions and camera recordings.

Common transaction data sources are PoS (Point of Sale) or ATM (Automated Teller Machine) which enables you to easily investigate and prove fraud. But actually any transaction data source that you would like to time-link with digital video monitoring can be combined through Milestone XProtect Transact. A few examples of other transaction data sources and purposes are: number plate recognition for collection of road taxes, access control for combined visual identification for higher security—but the only limit is your imagination. Note, that some solutions might require additional programs and/or customizations.

The examples used in this manual show typical retail situations and transactions data from PoS (Point of Sale) or ATM (Automated Teller Machine). For these purposes Milestone XProtect Transact speeds up investigations into fraud by integrating digital video surveillance images with PoS (Point of Sale) or ATM (Automated Teller Machine) transaction data: 1-to-1 correspondence of images to transactions. Transaction data is time-linked with video images of cash registers/ATMs for simultaneous display of transactions and camera recordings. Whether the problem is internal or external perpetrators, it is easy to find suspicious transactions with Milestone XProtect Transact features for searching transactions by cash register/ATM, camera, data, time or free text.

### See also

Viewing live transactions (on page 10)

## *Interaction with sources and surveillance solutions*

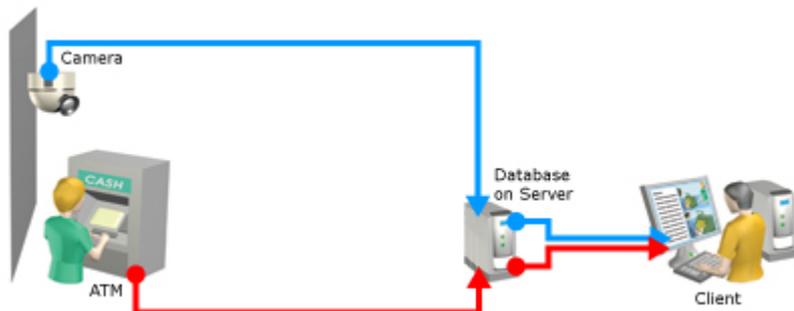
There are several components in the XProtect Transact communication flow. XProtect Transact consists of a Transact Server and a Transact Database.

The XProtect Transact Server has a service that listens for transactions from **sources**. Five different kinds of source exist: Serial ports, TCP clients, TCP XML, Troy boxes and an Analytics XProtect Transact provider (more types may be available in customized XProtect Transact installations). Sources, in turn, are connected to the actual devices on which the transaction data is generated (cash registers, ATMs, etc.).

When the XProtect Transact Server receives transaction data from a source, it stores the data in the XProtect Transact Database.



Video recordings are stored independently on your surveillance server, as defined through the configuration of your XProtect surveillance solution.



Example only: The blue arrows outline video recordings from the surveillance system, while the red arrows outline transaction data from sources. In addition to an ATM, transaction data may also come from a cash register or any other RS-232-enabled device.

In addition to an ATM, transaction data may also come from a cash register or any other RS-232-enabled device.

## ***What happens when you browse transactions and video together?***

With the XProtect Smart Client application, you can view transaction data together with recordings of the transaction taking place.

When you want to browse transaction data and video recordings together, you open the **XProtect** Smart Client application.

- The XProtect Smart Client requires that a plugin is installed; see Installation.

The XProtect Smart Client offers extremely feature-rich access to time-linked transaction data and video recordings, among other things view of live transactions, export and print of transaction data and video, and advanced search features.

In the XProtect Smart Client you simply create a view, select the required transaction data source (for example a particular cash register), then the required video sources (for example two cameras covering the area around the cash register from different angles), and you are ready to browse. See *Creating a view with transactions in the XProtect Smart Client* (see "Create a view with transactions in the XProtect Smart Client" on page 8).



The time-linking of the transaction data and video recordings enables you to view and browse the transaction data and video recordings simultaneously. The current transaction is highlighted with a yellow bar. If you are viewing more than one transaction, the transactions that don't match the time stamp exactly are displayed highlighted in gray.



Browsing of transactions and video recordings in the **XProtect Smart Client**.



## Viewing transactions in the XProtect Smart Client

### Create a view with transactions in the XProtect Smart Client

If your XProtect Smart Client user rights permit you to create views, you can create views with transactions together with recordings. Simply create the required view with XProtect Transact content on the XProtect Smart Client's **Setup** tab.

Creating a view may not be necessary if views in shared groups are used in your organization. Views in shared groups can be shared among XProtect Smart Client users. If a view with XProtect Transact content is available in a shared group, you may simply select the view on the XProtect Smart Client's **Live** or **Browse** tabs, and begin live viewing or browsing of transaction data with matching video recordings. Consult your system administrator if in doubt about whether views in shared groups are available in your organization.

To create a view with XProtect Transact content, do the following:

1. Open and log in to the XProtect Smart Client.

**Tip:** For information about how to open and log in to the XProtect Smart Client, see separate documentation for your XProtect Smart Client.

1. In the XProtect Smart Client, select the **Setup** tab.
2. On the **Setup** tab, create a new view.

You may select any view layout from the list, but some layouts, such as the **Transact + 2** layout, are particularly suited for viewing transaction data and camera images together:





Example of available layouts; more layouts may be available in your version.

Depending on requirements and user rights, you may create the view in a shared or private group.

**Tip:** For further information about how to create views, see separate documentation for your XProtect Smart Client.

1. Drag the required cameras from the **Setup** tab's **System Overview** section to the view's camera slots.
2. This step, and the next, may not be necessary if you are using one of the XProtect Transact views particularly suited for viewing transaction data and camera images together.

Drag the **System Overview** section's **Transact Source** entry to the slot in which you want to view transaction data.

The transaction data slot now changes color. However, you must still specify exactly which XProtect Transact source you want to view transaction data from.

**Tip:** If more than one XProtect Transact source is available, and if enough positions are available in the view, you can include more than one XProtect Transact source in the view. You can also create several views with different transaction sources.

See Status of transaction sources (on page 11) for information about the status bar of transaction view positions and the different possible states of a source.

3. Select the view's transaction data position, then expand the Setup tab's Properties section and expand the list over XProtect Transact servers:



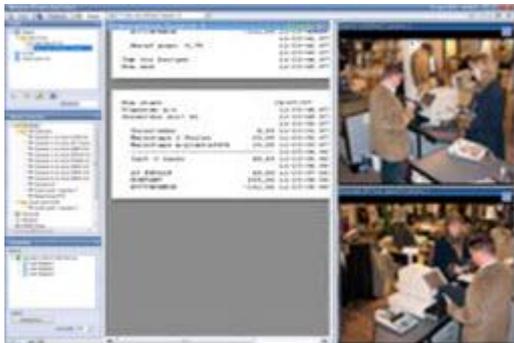
Color legend:

- Gray: Starting up (will only be visible on slow connections).
- Yellow: Getting status.
- Red: Unable to connect to server.
- Green: OK.

If color indication for a service is red, the system will keep trying every five seconds until contact is made to the server.



- Once the required server connection is OK, click the source you wish to display in the transaction Data Position:



Repeat if your view should contain more than one XProtect Transact source.

The view is now ready for use.

**Tip:** You can change the font size used for displaying the transaction data as well as the line width. You change these settings in the Setup tab's Properties section.

## Viewing live transactions

If your XProtect Smart Client user rights permit live viewing, you are able to view live transactions together with recordings. Simply select the required XProtect Transact view on the Smart ClientXProtect Smart Client's **Live** tab.

See Status of Transaction Sources (on page 11) for information about the status bar of transaction view slots and the different possible states of a source.

For further information about using the XProtect Smart Client's **Live** tab, see separate documentation for your XProtect Smart Client.

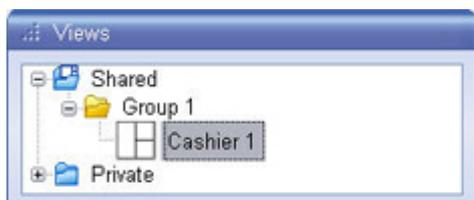
## Browsing transactions in the XProtect Smart Client

If your XProtect Smart Client user rights permit you to browse, you are able to browse transactions together with recordings. Simply select the required XProtect Transact view on the Smart ClientXProtect Smart Client's **Browse** tab.

To browse transaction data together with video recordings, do the following:

- Select the XProtect Smart Client's **Browse** tab.

In the **Browse** tab's **Views** section, select the required view:



Example: Selecting a view



Consult your system administrator if in doubt about which views contain XProtect Transact content.

- The selected view will be displayed on the **Browse** tab:



The transaction that is time-linked with the currently shown video is highlighted with a yellow bar.

You are now able to browse the transaction data and corresponding video recordings on the XProtect Smart Client's **Browse** tab:

- Use the navigation features on the XProtect Smart Client's **Browse** tab for browsing transactions/recordings backward or forward in time. For detailed information about the XProtect Smart Client's browsing features, see separate documentation for your Smart ClientXProtect Smart Client.
- Use your mouse's scroll wheel or drag up/down inside the displayed transaction data to move backward or forward in time. Video recordings will move correspondingly.
- Use the search panel located inside the XProtect Transact view on the XProtect Smart Client's **Browse** tab for searching transaction data and view search results with matching video recordings.

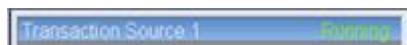
### See also

Transaction Search Features in the XProtect Smart Client (see "Transaction search features in XProtect Smart Client" on page 12)

Status of Transaction Sources (on page 11)

## Status of transaction sources

A transaction data view slot is identified by a status bar, located in the top of the transaction position.



Example of a transaction view slot's status bar

The status bar displays the name of the transaction source and the state of the source. A source can have the following states:

- Running:** XProtect Smart Clients receives data from the source.



- **Suspended:** Your XProtect Transact administrator has temporarily suspended the transaction source. Contact your administrator and ask for resumed access to transaction data from this source.
- **Not connected:** The XProtect Transact service is not running. Contact your administrator and ask for access to transaction data from this source.
- **Undefined:** The defined source in the XProtect Smart Client view has been deleted in Transact. Contact your administrator and ask for access to transaction data from this source.
- **No data in source:** The defined source exists in Transact, but no data is sent/received. Contact your administrator and ask for access to transaction data from this source.

## Transaction search features in XProtect Smart Client

When a XProtect Transact view is displayed in the XProtect Smart Client's **Browse** tab, a search panel is available below the displayed transactions.

You can select between two different search methods in the search panel's **Search type** field.

- The **Simple search** method lets you search for single phrases at a time.
- The **Multiple search** method lets you search for multiple phrases at a time, with the possibility of using different colors for highlighting occurrences of phrases with different importance.

The content of the search pane changes depending on whether you have selected the simple or multiple search method.



Simple search method and the multiple search method respectively. Both with the **[Search Result Window]** to the right.

### Using simple search

If you have selected the simple search method, the search panel will have the following content:

- **[Search Phrase Field]:** Lets you search transaction data for a particular phrase.



Lines in which the specified phrase appears will immediately be highlighted by blue squares in front of the lines in the transaction window:

DATE 12-11-2003	10:25
T-SHIRT	95.50
CORDUROY PANTS	295.95
■ GLOVES	159.95
TOTAL	551.40
CHANGE	48.60
HUSUM FASHION SHOP	
TEL 80 45 45 30	

The next 10 occurrences containing the required search phrase are also immediately displayed in the **[Search Result Window]** to the right of the search panel.

**Tip:** With the search panel's other features, such as the **Case Sensitive** check box, you are able to narrow your search criteria. See the descriptions of these features in the following.

**Tip:** You can quickly jump between occurrences of the specified phrase by clicking the **Up** and **Down** buttons or by clicking on the different occurrences in the **[Search Result Window]**.

- **Up:** Lets you quickly jump to the previous occurrence of the phrase specified in the search phrase field.
- **Down:** Lets you quickly jump to the next occurrence of the phrase specified in the search phrase field.
- **Use:** Lets you select between three ways of searching for the phrase specified in the **[Search Phrase Field]**:
- **Simple:** Use simple search, with which any line containing an occurrence of the specified phrase will be highlighted.
- **Exact:** Use exact match, with which occurrences of the specified phrase will be highlighted only if they are preceded and followed by a blank space. Example: If you specify the search phrase **jack**, only occurrences in which the phrase **jack** appears surrounded by spaces will be highlighted, whereas occurrences such as **jacket** will not.
- **Wildcards:** Search using wildcards. Three different characters can be used as wildcards:
  - The asterisk character (\*). Place an asterisk after required characters to search for all occurrences in which those characters appear. Example: If you specify **jac\*** as your search phrase, all occurrences containing the letters **jac**, such as **leatherjacket**, **jackboots** and similar, will be highlighted.
  - The question mark character (?), with which any single character can be substituted. Example: If you specify the search phrase **j?ck**, all occurrences such as **jack**, **jock**, etc. will be highlighted. You may use several question mark characters in your search. Examples: **jac???n** or **j?cks?n**.
  - The hash character (#), with which any single digit can be substituted. Example: If you specify the search phrase **4#**, all occurrences such as **40**, **41**, etc. will be highlighted. You may use several hash characters in your search. Examples: **4##** or **12#4##7**.
- **Case sensitive:** When you select the **Case sensitive** check box, only occurrences matching the case used in the specified phrase will be highlighted.



Example: If you specify the search phrase **gloves**, only occurrences of the phrase in lower case will be highlighted.

- **[Search Result Window]:** Displays the next 10 occurrences of the defined search phrase. You can quickly jump to one of the occurrences in the **[Search Result Window]** by clicking on the date and time of the occurrence. The content in the **[Search Result Window]** is updated immediately when using one of the browse functions in the XProtect Smart Client.

## Using multiple search

Using multiple search, is for instance a clothes store manager able to search for transactions including the phrases **silk tie**, **socks**, **t-shirt** and **return** at the same time. He is able to specify that occurrences of each phrase should be highlighted in different colors according to their importance. He might, for example, specify that occurrences of the phrase **return** should be highlighted in red in order to indicate **Very Important**.



If you have selected the multiple search method, the search panel will have the following content:

- **Setup:** Clicking the **Setup** button will open the **Search Setup** window. Further clicking the **Search Setup** window's **Add...** button opens the **Define Search** window, which lets you define each of the search phrases to be used in your multiple search.



**Name:** Lets you specify a name for the search phrase. Specifying a name is compulsory.

Specifying a name lets you quickly identify each element of the multiple search, whereas identifying individual elements based on the actual search phrase specified in the **Search pattern** field would be difficult because the search phrase may contain wildcards or other special characters.

- **Search pattern:** Lets you specify the required search phrase.

**Tip:** Based on your selection in the **Use** field (described in the following), you are able to use wildcards, etc. in your search phrase.

**Tip:** With the search panel's **Case Sensitive** check box (described in the following), you are able to narrow your search criteria.



- **Case sensitive:** When you select the **Case sensitive** check box, only occurrences matching the case used in the specified phrase will be highlighted.

Example: If you specify the search phrase **gloves**, only occurrences of the phrase in lower case will be highlighted.

- **Use:** Lets you select between three ways of searching for the phrase specified in the **[Search Phrase Field]**:
- **Simple:** Use simple search, with which any line containing an occurrence of the specified phrase will be highlighted.
- **Exact:** Use exact match, with which occurrences of the specified phrase will be highlighted only if they are preceded and followed by a blank space. Example: If you specify the search phrase **jack**, only occurrences in which the phrase **jack** appears surrounded by spaces will be highlighted, whereas occurrences such as **jacket** will not.
- **Wildcards:** Search using wildcards. Three different characters can be used as wildcards:
  - The asterisk character (\*). Place an asterisk after required characters to search for all occurrences in which those characters appear. Example: If you specify **jac\*** as your search phrase, all occurrences containing the letters **jac**, such as **leatherjacket**, **jackboots** and similar, will be highlighted.
  - The question mark character (?), with which any single character can be substituted. Example: If you specify the search phrase **j?ck**, all occurrences such as **jack**, **jock**, etc. will be highlighted. You may use several question mark characters in your search. Examples: **jac???n** or **j?cks?n**.
  - The hash character (#), with which any single digit can be substituted. Example: If you specify the search phrase **4#**, all occurrences such as **40**, **41**, etc. will be highlighted. You may use several hash characters in your search. Examples: **4##** or **12#4##7**.
- **Type:** Lets you select between four importance levels: **Normal**, **Very Important**, **Important** and **Info**.

When occurrences of a phrase are found during a multiple search, the occurrences will be highlighted in different colors according to the selected importance level for each phrase. For example, phrases defined as **Very Important** will be highlighted in red.

**Tip:** You can quickly jump between occurrences of the specified phrases by clicking the **Up** and **Down** buttons or by clicking on the different occurrences in the **[Search Result Window]**.

- **Up:** Lets you quickly jump to the previous occurrence of one of the specified search phrases.
- **Down:** Lets you quickly jump to the next occurrence of one of the specified search phrases.
- **[Search Result Window]:** Displays the next 10 occurrences of the defined search phrases. You can quickly jump to one of the occurrences in the **[Search Result Window]** by clicking on the date and time of the occurrence. The content in the **[Search Result Window]** is updated immediately when using one of the browse functions in the XProtect Smart Client.



## Printing transactions from the XProtect Smart Client

With the **Browse** tab's **Print** section, you are able to print transaction data. The current transaction receipt (till receipt or other) is printed. The current transaction is highlighted with a yellow bar in the transaction view slot. If you are viewing more than one transaction, the transactions that don't match the time stamp exactly are displayed highlighted in gray.

When you print a transaction receipt, an image of the receipt is automatically included in a small surveillance report, in which you are also able to include notes about the transaction.

Transaction receipts longer than 70 lines are not suitable for printing. The printed receipt will be too small to read.

To print a transaction, do the following:

1. Select the transaction view slot.
2. Select the required transaction by browsing to the right date and time (see "Browsing transactions in the XProtect Smart Client" on page 10).
3. Click the **Print** section's **Print...** button.

This will open the XProtect Smart Client Surveillance Report window with a preview of the transaction to be printed as well as information about source name, capture time, print time and user name of the user printing the image.

You are also able to include a user's note, for example a description of the recorded incident.



Window with preview and information about your print. Date and time format may be different on your computer.

See XProtect Smart Client's separate documentation for more information.



## ***Exporting data and recordings in the XProtect Smart Client***

You can export database files containing the transaction data and recordings included in the selected view using the export feature of the XProtect Smart Client.

Make sure the item in the view containing transaction data is included in your export.

As part of the database export, you can include the Smart Client – Player application. When dealing with transaction data, the Smart Client – Player application must be included in the export to view the exported database files on other computers. Remember that an export including the Smart Client – Player can contain data from a maximum of 24 hours, so if you have seven days of data, you must export the data in seven export files. You cannot export transaction data in AVI/JPEG format.

See XProtect Smart Client's separate documentation for more information.



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#### **About Milestone Systems**

Founded in 1998, Milestone Systems is the global industry leader in open platform IP video management software. The XProtect platform delivers powerful surveillance that is easy to manage, reliable and proven in thousands of customer installations around the world. With support for the widest choice in network hardware and integration with other systems, XProtect provides best-in-class solutions to video enable organizations – managing risks, protecting people and assets, optimizing processes and reducing costs. Milestone software is sold through authorized and certified partners. For more information, visit:

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