

Milestone Systems

XProtect[®] Transact

Getting Started Guide



The Open Platform Company



Contents

- TARGET AUDIENCE.....3**
- BASIC CONCEPTS5**
 - SOURCES..... 5
 - SOURCE PROVIDERS..... 5
 - CONFIGURATIONS 5
 - MAC ADDRESS 6
- BEFORE INSTALLING THE SOFTWARE7**
 - SYSTEM REQUIREMENTS..... 7
 - LICENSING 7
 - UPGRADE FROM A PREVIOUS VERSION..... 8
 - REGISTER SLC 8
- INSTALL THE SOFTWARE10**
- CONFIGURING THE INSTALLATION12**
 - VERIFYING DEFAULT DATA STORAGE LENGTH..... 12
 - ADDING TRANSACTION DATA SOURCES 12
- TRANSACTION DATA AND VIDEO RECORDING.....14**
- COPYRIGHT, TRADEMARKS AND DISCLAIMERS15**



Target Audience

This Getting Started Guide is aimed at system administrators only.

It briefly explains the steps involved in installing Milestone XProtect Transact (hereafter simply referred to as Transact) as well as how to configure some of its key features. For more detailed descriptions of each Transact feature, please refer to the manuals available on the Transact software DVD as well as on www.milestonesys.com. Once installed, Transact furthermore features a comprehensive help system; simply press F1 on your keyboard to use the help system.

Please check www.milestonesys.com for updates to make sure you install the most recent version of our software.



Copyright, trademarks and disclaimer

Copyright

© 2012 Milestone Systems A/S.

Trademarks

XProtect is a registered trademark of Milestone Systems A/S.

Microsoft and Windows are registered trademarks of Microsoft Corporation. App Store is a service mark of Apple Inc. Android is a trademark of Google Inc.

All other trademarks mentioned in this document are trademarks of their respective owners.

Disclaimer

This text is intended for general information purposes only, and due care has been taken in its preparation.

Any risk arising from the use of this information rests with the recipient, and nothing herein should be construed as constituting any kind of warranty.

Milestone Systems A/S reserve the right to make adjustments without prior notification.

All names of people and organizations used in the examples in this text are fictitious. Any resemblance to any actual organization or person, living or dead, is purely coincidental and unintended.

This product may make use of third party software for which specific terms and conditions may apply. When that is the case, you can find more information in the file

3rd_party_software_terms_and_conditions.txt located in your Milestone surveillance system installation folder.



Basic Concepts

This section defines some of the basic concepts which are important to understand when configuring and using Transact.

Sources

A source is a data source through which transaction data is fed to the Transact Server and subsequently stored in the Transact Database. Transaction data can originate from cash registers, ATMs, etc. The connection between the Transact Server and the cash registers, ATMs, etc. is in the Transact Administrator established through the definition of a source provider (see "Basic Concepts" for a definition of the term "Source Provider").

The transaction data from sources is transformed into a presentable, reader-friendly form through configurations (see "Basic Concepts" for a definition of the term "Configuration").

Source Providers

There are four different kinds of source providers through which the transaction data is fed from a PoS, ATM or others to the Transact Server:

- Troy Box Transact provider: Use when receiving transaction data from a Troy box on your network through port 9100. Troy box is a popular name for a Troy serial server. Provided the Troy box has been assigned an IP address, it is able to receive serial input from a cash register, ATM or any other RS-232 source and relay it to the Transact Server through your network.
- Serial Port Transact provider: Use when receiving transaction data as input on the computer's own serial port.
- TCP XML Transact provider: Use when receiving transaction data through a serial server device and the transaction data is fed as XML packages. It is prerequisite that the content of the XML packages includes a time stamp in the following format: **<Timestamp>date and time according the RFC 3339 standard</Timestamp>**.
- TCP Client Transact provider: Use when receiving transaction through any kind of serial server device. This option also allows you to receive data directly from a PoS (Point of Sale) source, such as a cash register, provided the PoS source can be configured for this purpose.

Additional kinds of sources may be available in customized Transact installations.

Configurations

Configurations transform received transaction data from sources (see "Basic Concepts" for a definition of the term "Source") into a presentable, reader-friendly form. You are able to omit and substitute characters and define where individual transactions begin and end, so end-users can view the transaction data in a format matching real-life till receipts, ATM receipts, etc.

The initially received transaction data typically consists of a single long string of information, and includes control characters or other characters that are irrelevant and confusing when end users want



to view the transaction data. If the data originates from a printer connection, it may for instance contain unprintable characters used for indicating line breaks, when to cut off a till receipt, etc.

Transact comes with two built-in configurations called **Epson default** and **Analytics**. The **Analytics** configuration is only available for sources that use the source provider TCP XML Transact Provider. **Epson default** is available for all the other source providers (see "Basic Concepts" for a definition of the term "Source Provider"). Epson is a widely recognized printer manufacturer; thus Epson's way of dealing with control characters is often supported by printers of other makes as well. You can often save time by basing your configuration on a copy of the **Epson default** configuration.

MAC Address

A MAC address is a 12-digit hexadecimal number (example: 0123456789AF), also called the computer's Physical Address. To find the computer's MAC address do the following: Click **Start** -> **Run**. Type **cmd** in the Open field and click **OK**. Write **ipconfig /all** on the command prompt. Find the Physical Address. When you write the MAC address omit all hyphens: The MAC address 01-23-45-67-89-AF must be written as 0123456789AF during the registration.



Before Installing the Software

System requirements

Name	Description
CPU	Intel® Pentium 4 or compatible, minimum 2.4 GHz
RAM	512 MB
Network	Ethernet (100 Mbit recommended)
Operating System	<ul style="list-style-type: none"> • Microsoft® Windows® XP Professional • Microsoft Windows Server 2003 • Microsoft Windows Server 2008 • Windows Vista™ • Windows 7 (32-or 64-bit)
Software	<ul style="list-style-type: none"> • Microsoft .NET 4.0 framework required • XProtect Corporate 3.0 or newer • XProtectEnterprise 6.0 or newer • XProtect Professional 6.0 or newer • XProtect Basis+ 6.0 or newer required • XProtect Smart Client 6.0 or newer

Licensing

When you purchase XProtect Transact, you also purchase two types of licenses:

- **Software License Code (SLC):** A license to use the XProtect Transact application.
- **Connection License Key (CLK):** A license for a certain number of simultaneously opened transaction sources.

During the installation you are asked to enter both the SLC and the CLK. The Software License Code is printed on the Product License Sheet enclosed with the XProtect Transact software as well as on your order confirmation. You must, however, register your SLC (see "Register SLC" on page 8) to get the CLK.



You can add an unlimited number of transaction sources in XProtect Transact. You can, however, only view the number of simultaneous transaction sources corresponding to your CLK. At any time, you can obtain a new CLK with more simultaneously viewed transaction sources.

Upgrade from a previous version

If you are updating from a previous version of XProtect Transact, note the following:

- Before you install XProtect Transact 2.5, you must remove the XProtect Transact software, XProtect Transact Plugin Installer and any XProtect Smart Client Plugins of the previous XProtect Transact version.
- XProtect Transact 2.5 uses a new database (Microsoft SQL Server 2005 Express Edition) compared to previous versions of XProtect Transact (Microsoft SQL Server Desktop Engine).
- XProtect Transact 2.5 can use the old database, but we recommend installing the new—and better—XProtect Transact 2.5 database.

If a previous XProtect Transact database is detected on the computer during the installation, you will be asked whether you want to install the new database Microsoft SQL Server 2005 Express Edition, or update the old database.

If you choose to install the new database, the old database and its content are moved to a new folder but remain on the computer and new transaction data will be stored in the new database. However, XProtect Transact 2.5 cannot read data from the old database or make it available for browsing or viewing.

If you have a lot of important data, update the old database. If you have less data, for example, seven days of transaction data, export the data from the old database with the export features in the XProtect Smart Client before you remove the previous XProtect Transact installation and install XProtect Transact 2.5 with the new database.

Even if the old database and its content remain on the computer, if you choose to install the new database, it is not possible for you to access the data in the old database by removing XProtect Transact 2.5 and reinstalling XProtect Transact 2.2. If it is very important for you to access the old database, you can contact your Milestone vendor.

For information about the export features in the XProtect Smart Client see Exporting Data and Recordings in the XProtect Smart Client in the XProtect Transact User's manual and the separate documentation for the XProtect Smart Client.

Register SLC

If you do not have your SLC, contact your vendor.

1. Go to the Milestone website at www.milestonesys.com, and click the Software registration link in the menu.
2. Log in to the Software Registration Service Center with your user name (e-mail address) and password.

Tip: If you have not used the Software Registration Service Center before, click the **New to the system?** link, and follow the instructions for registering yourself as a user, then log into the Software Registration Service Center by using your registered user name and password.



3. In the Software Registration Service Center, click the **Add SLC** link.
4. Type your SLC. Confirm that you want to add the SLC to your account, and then click **OK**.
5. Once your SLC has been added, click the **Main menu** link.
6. Click the **Logout** link to log out of the Software Registration Service Center.

Tip: If you plan to use online activation when you activate your licenses, make sure you use the same user name (e-mail address) and password that you used when you registered the SLC.



Install the software

Read the License Terms on the Product License Sheet (enclosed with the software DVD) before installing XProtect Transact.

Prerequisites: If you are upgrading, read Upgrading from a previous version (see "Upgrade from a previous version" on page 8) first. Before installing the software, register your XProtect Transact Software License Code (SLC) (see "Register SLC" on page 8). When the license is registered, a Connection License Key (CLK) is generated. You need the CLK during the installation. Check that you have the latest version of Microsoft .NET Framework 3.0. You can download .NET Framework 3.0 from Microsoft's Download Center at www.microsoft.com/downloads (see <http://www.milestonesys.com/?cid=413> - <http://www.milestonesys.com/?cid=413>).

If you are installing XProtect XProtect Transact on a computer running Windows Vista, you must run the installation as an administrator.

Install XProtect Transact on the same computer as the server for XProtect Enterprise or XProtect Professional or XProtect Basis+ or on the same computer as the management server for XProtect Corporate.

To install XProtect Transact, do the following:

1. Run the XProtect TransactInstaller.exe installation file (either from the DVD or internet). The wizard starts automatically.
2. Read and accept the license agreement.
3. Enter the SLC and CLK for your XProtect Transact solution.
4. **SQL Server Install/Select:** Choose between using an existing SQL 2005 Server on the network or setting up a SQL Server Express Edition on the computer itself.

Important: If you are updating from a previous version of XProtect Transact, we recommend you install the new database application (read Updating from a Previous Version on page).

- If you choose to setup a SQL Express Edition, **only** edit the **SQL services user** and **System administrator password** fields are required. For example, if your local security setup requires you to use another user than the one suggested per default. If you chose to use another user than the default, this user must already be known by the server.
- If you use the existing SQL database, **only** edit available SQL servers if required. For example, if your local security setup requires you to use another server than the one suggested per default.

This installation may take a short while, after which you are automatically taken to the following installation step.

5. **Database Create/Select:** If you are upgrading from a previous version, select whether you want to use your existing database or create a new one. Specify a database password manually **only** if your local security setup requires you to.
6. **Install Server:** On this installation step, the XProtect Transact server will be installed. Click **Next**.

The XProtect Transact installation is complete.



You can now begin to configure your XProtect Transact in the **XProtect Transact Administrator** window.



Configuring the Installation

You are now able to access the **Transact Server Service** for server service configuration and/or open the **Transact Administrator** window for other configuration of your Transact solution.

- You access the **Transact Server Service** from the taskbar (a.k.a. systray). Server Services does not have to be running during configuration, they will be (re)started automatically when configuration settings are saved.



- You access the **Transact Administrator** window by double-clicking the **Transact Administrator** desktop shortcut. Alternatively, you can access it from Windows' **Start** menu, by selecting **Start > All Programs > Milestone Transact > Transact Administrator**.

Verifying Default Data Storage Length

Verify that transaction data will be stored in the Transact Database for sufficiently long to cover your organization's needs.

By default, transaction data will be stored for seven days, but you are able to change this default value on the **Transact Administrator** window's **General settings** tab.

Note that when adding individual sources, you are furthermore able to define individual transaction data storage lengths for each source.

Adding Transaction Data Sources

You are now ready to add transaction sources.

To add a source, do the following:

1. On the Transact Administrator window's **Sources** tab, click **Add New....** This will open the **New Source** window.
2. In the **New Source** window, specify a name for the new source in the **Source name** field, and select the required type of source in the **Source providers** list.

Tip: If required, the source name may contain spaces and special characters, such as @, \$, %, æ, etc.

Then click **OK** to go to the **Create Source** window, in which you specify properties for the source.



3. Specify the required settings for how long you want to save transaction data, and the different properties for the selected source provider.
4. Select a built-in standard configuration (See "Basic Concepts" for a definition of the term "Configuration").
 - If you are defining a source that uses the source provider **TCP XML Transact Provider**, select the built-in standard configuration **Analytics** from the list in the **Configuration** section.
 - For all other source providers select the built-in standard configuration **Epson default** from the list in the **Configuration** section.

You can add a new configuration or edit the built-in standard configuration later.

1. When ready, click **OK**.

The new source will now appear in the **Transaction sources** list on the **Transact Administrator** window's **Sources** tab.

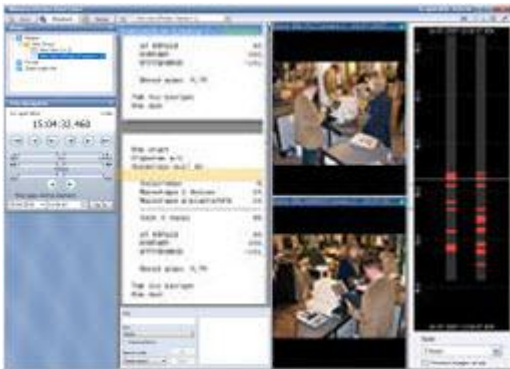
For detailed information about creating and editing configurations including a step-by step example as well as descriptions of each of the **Create Configuration** or **Edit Configuration** window's fields and features, please refer to the separate documentation of Transact Administrator's Manual, which is available on the Transact software DVD as well as on www.milestonesys.com.



Transaction Data and Video Recording

Once Transact has been installed and configured this way, you can browse transaction data together with video recordings using the Xprotect Smart Client.

The 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.



Browsing of transaction data and video recordings in the Smart Client

Detailed descriptions of how to view transaction data together with video recordings are available in the Transact Administrator's Manual as well as the end user-targeted Transact User's Manual. Both manuals are available on the Transact software DVD as well as on www.milestonesys.com.



Copyright, Trademarks and Disclaimers

Copyright

© Milestone Systems A/S.

Trademarks

XProtect is a registered trademark of Milestone Systems A/S.

Microsoft and Windows are registered trademarks of Microsoft Corporation.

All other trademarks mentioned in this document are trademarks of their respective owners.

Disclaimer

This document is intended for general information purposes only, and due care has been taken in its preparation.

Any risk arising from the use of this information rests with the recipient, and nothing herein should be construed as constituting any kind of warranty.

Milestone Systems A/S reserve the right to make adjustments without prior notification.

All names of people and organizations used in this document's examples are fictitious. Any resemblance to any actual organization or person, living or dead, is purely coincidental and unintended.

This product may make use of third party software for which specific terms and conditions may apply. When that is the case, you can find more information in the file

3rd_party_software_terms_and_conditions.txt located in your Milestone surveillance system installation folder.



The Open Platform Company

No index entries found.



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:

www.milestonesys.com.