


# Avoka Transact


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# Transact Manager (Manager v5.1)

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**Welcome** to the Transact Manager 5.1 documentation. Here you will find all sorts of information related to Transact Manager 5.1.

 Please note that the documentation for Transact Manager 5.1 is still under development. New pages of information will be added as they become available. For more information on Transact Manager please see the [Transact Manager 5.0 documentation](#).

Use the search box below to find specific information on Transact Manager 5.1.

## Contents

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## Recently Updated

[Transact Manager \(Manager v5.1\)](#)  
May 31, 2019 • updated by Anonymous • [view change](#)

[Transact Manager \(Manager v17.10\)](#)  
May 31, 2019 • updated by Anonymous • [view change](#)

[Managing Form Attachments \(Manager v5.0\)](#)  
May 30, 2019 • updated by Anonymous • [view change](#)

[Delivery Configuration \(Manager v5.0\)](#)  
May 30, 2019 • updated by Anonymous • [view change](#)

[Importing Forms from Transact Composer \(Manager v5.0\)](#)  
May 30, 2019 • updated by Anonymous • [view change](#)

# Introduction to Transact Manager (Manager v5.1)

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## Overview

Transact Manager is the heart of the Avoka Transact platform. It is a System of Engagement, purpose-built to manage the end user experience for account opening, onboarding and account servicing, and submit a complete application package to the back office systems of record.

## What is Transact Manager?


Avoka Transact Manager is a server application, hosted in the cloud or on-premise, that hosts forms, controls interaction with customers, calls on specialized services like identity verification or risk analysis and exchanges data with back office systems of record.

Transact Manager productizes the technology needed for a best in class digital sales experience in a pre-built platform. This allows financial and government institutions to create their user experience, without having to engineer the complex security, data capture, resiliency, convenience and integration features required underneath.



## Transact Manager Topics

# Transact Manager Configuration (Manager v5.1)

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The content within this section covers information relating to configuring and working with organizations in Transact Manager.

Below you will find a list of topics within this section.

- [Organization Configuration \(Manager v5.1\)](#)
- [User Accounts \(Manager v5.1\)](#)
- [Form Spaces \(Manager v5.1\)](#)
- [System Logs \(Manager v5.1\)](#)
- [Configure Virus Scanning for Attachments \(Manager v5.1\)](#)

# Organization Configuration (Manager v5.1)

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## Related Pages:

- [Copy an Organization \(Manager v17.10\)](#)
- [Copy an Organization \(Manager v5.1\)](#)
- [Create an Organization \(Manager v17.10\)](#)
- [Create an Organization \(Manager v5.1\)](#)
- [Delete an Organization \(Manager v17.10\)](#)
- [Delete an Organization \(Manager v5.1\)](#)
- [Organization Configuration \(Manager v17.10\)](#)
- [Organization Configuration \(Manager v5.1\)](#)

## Overview

An organization in Transact Manager is a sub-group of users (usually developers) who all share a common location where they deploy and manage their own set of forms and transactions. Transact Manager 5.1 is designed to accommodate anything from a single organization with a single form, to multiple organizations with several different forms, and multiple form versions.

In Transact Manager, forms are owned by an organization, and organizations have properties and metadata values that are used by their forms. To successfully use Transact Manager, at least one organization needs to be configured for use. However, setting up several organizations allows you to customize branding and other organization specific configuration settings. Setting up multiple organizations also allows you to set up specific administrators for each configured organization. These administrators can be set up with access rights to data exclusive to individual organizations.

## Browse the List of Organizations

Transact Manager allows you to view the list of current organizations configured in your instance of Transact Manager. To view the list of organizations that are currently configured in your instance of Transact Manager, follow the steps below.

1. Select *Forms* from the menu bar.  
Selecting *Forms* will display the forms dropdown menu.
2. Select *Organizations* from the forms dropdown menu.  
Selecting *Organizations* will display a list of the organizations that are currently configured in your instance of Transact Manager (The *Organizations List* page).  
The screenshot below displays a list of organizations configured in an instance of Transact Manager.

### Organizations

[Home Dashboard](#) > [Organizations](#)

Organization Name	Client Code	Active	Last Modified	Action
<a href="#">ahepburn</a>	ahepburn	✓	22 Jan 2018 by asmith	
<a href="#">Avoka Financial Group</a>	AFG	✓	05 Jan 2018 by tbrown	
<a href="#">Maguire</a>	maguire	✓	31 Oct 2017 by administrator	
<a href="#">Transact Server Monitoring</a>	tm-server-monitor	✓	07 Nov 2014 by administrator	

◀ ▶ [Export Data](#)

The organizations list page allows you to create new organizations, create a copy of an organization, and edit () or delete () existing organizations. This page also allows you to export () or import organizations.

## Filter the List of Organizations

You can filter the list of organizations by using the search text box on the *Organizations List* page and entering a substring of the organization's name. You can also filter out organizations that are inactive by selecting the *Active Only* checkbox. Selecting this checkbox will ensure that only 'Active' organizations will be displayed. You can also export the filtered search results as an Excel file by clicking the *Export Data* link below the table.

# Create an Organization (Manager v5.1)

Unknown macro: 'redirect'

## Create a New Organization

Creating an Organization is an essential role of an Administrator. The steps below document the process of creating a new Organization.

1. Select *Forms > Organizations* from the menu bar
2. Select *New*  
Selecting *New* will display a blank form and direct you to the Organizations tab. The screenshot below illustrates this blank form and highlights the Organization tab.

The screenshot shows the 'New Organization' form in the Transact Manager interface. The form is titled 'New Organization' and is part of the 'Organizations' tab. It contains several input fields: 'Name' (organization display name), 'Client Code' (short organization code), 'Description', and 'Credential Alias'. There is also a checkbox for 'Active' and a dropdown for 'Email Service'. The 'Save' button is highlighted in blue.

3. Provide a name for the Organization
4. Provide a Client Code for the Organization.  
A Client Code is the code that will be used in the backend of TM to uniquely identify the Organization when an end user requests a form. The Client Code should be between 3-4 characters.
5. Click *Save*.  
Clicking *Save* will create a record for the new Organization. You will automatically be directed to the Spaces tab.
6. From the Spaces tab, assign the organization the Web Plug-in space.  
You can assign other spaces if needed, but the Web Plug-in space is required. Please see [Web Plug-In Space \(Manager v5.1\)](#) for more information. Selecting the ">>" icon will move all available Form Spaces from the *Available List* to the *Assigned List* for the Organization. Selecting the "<" icon or "<<" icon will remove the selected Form Spaces from the *Assigned List*, and add them to the *Available List*.

The screenshot shows the 'Spaces' tab in the Transact Manager interface. The 'Spaces' tab is selected, and the 'Available Spaces' list is visible. The 'Assigned Spaces' list is also visible, showing 'Web Plug-in'. The 'Save' button is highlighted in blue.

7. Click *Save*.  
The space(s) is now assigned to the Organization. At this point the organization is ready to use, and you can assign user accounts to the organization. See [Create a New User Account \(Manager v5.1\)](#) for more information.

The above steps include the minimally required configuration to create an organization. Below you will find information on the configuration options available on the other tabs.



# Copy an Organization (Manager v5.1)

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## Related Pages:

- [Copy an Organization \(Manager v17.10\)](#)
- [Copy an Organization \(Manager v5.1\)](#)
- [Create an Organization \(Manager v17.10\)](#)
- [Create an Organization \(Manager v5.1\)](#)
- [Delete an Organization \(Manager v17.10\)](#)
- [Delete an Organization \(Manager v5.1\)](#)
- [Organization Configuration \(Manager v17.10\)](#)
- [Organization Configuration \(Manager v5.1\)](#)

## Copy an Organization

Transact Manager allows you to make a copy of an Organization. A copy of an Organization can be useful for testing purposes (setting up multiple copies of the same Organization) or to set up a new Organization from a common "template" (the original Organization).

The new (copied) Organization will receive the same configuration as the parent (the original) Organization. You can also choose to include forms and their configurations when copying an Organization.

Follow the steps below to create a copy of an existing Organization.

1. *Select Forms > Organizations* from the menu bar.
2. Click the *Copy* button.  
Clicking this button will direct you to the *Copy Organization* screen.
3. Choose the Organization that you want to copy from the 'Copy Organization' dropdown menu.
4. Provide a name for the copied Organization and a client code for the new Organization.
5. Check the *Copy Forms* checkbox if you want to copy all the forms associated with the current Organization to the new (copied) Organization. If you do NOT want to copy all forms associated with the original Organization that you are copying, DO NOT check the *Copy Forms* checkbox.
6. Click the *Copy* button.

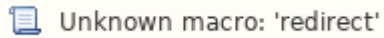
Transact Manager will create copies of all Organization-specific configurations and add references to all global configurations where necessary. Once the copy operation has completed, you can start using and modifying the new Organization. The screenshot below illustrates the 'Copy Organization' screen.

The screenshot shows the 'Copy Organization' interface. At the top, there is a breadcrumb trail: 'Home Dashboard > Organizations > Copy Organization'. The main form area contains a dropdown menu labeled 'Copy Organization' with 'Example Company' selected. Below this are two text input fields: 'New Name\*' with the value 'New Example Company' and 'New Client Code\*' with the value 'inexaco'. There is a checkbox labeled 'Copy Forms' which is checked. At the bottom of the form are two buttons: 'Copy' and 'Cancel'.



While most aspects of Organization and form configuration are copied, some configurations are specifically excluded and will not be copied to the new Organization. These configuration settings include Payment configuration, report schedules, delivery details and form manager references. Also, the newly created Organization will always be initially set as *Active*.

# Delete an Organization (Manager v5.1)




## Related Pages:

- [Copy an Organization \(Manager v17.10\)](#)
- [Copy an Organization \(Manager v5.1\)](#)
- [Create an Organization \(Manager v17.10\)](#)
- [Create an Organization \(Manager v5.1\)](#)
- [Delete an Organization \(Manager v17.10\)](#)
- [Delete an Organization \(Manager v5.1\)](#)
- [Organization Configuration \(Manager v17.10\)](#)
- [Organization Configuration \(Manager v5.1\)](#)


## Delete an Organization

You can delete an Organization and all its dependent entities (eg forms, submissions) from Transact Manager. Do consider this carefully as this cannot be undone and will permanently remove the Organization and its configurations. If possible, Organizations should be made inactive instead of deleted, especially if there have been submissions for any of their forms.

Follow the steps below to delete an Organization.

1. *Select Forms > Organizations* from the menu bar.
2. Click the *Delete* icon ().  
You will be asked to confirm this action before the Organization and all entities associated with it are permanently deleted.

# User Accounts (Manager v5.1)

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The content within this section covers information relating to user accounts in Transact Manager.

Below you will find a list of topics within this section.

- [User Accounts Overview \(Manager v5.1\)](#)
- [View the List of User Accounts \(Manager v5.1\)](#)
- [Create a New User Account \(Manager v5.1\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Remove a User Account \(Manager v5.1\)](#)
- [Roles \(Manager v5.1\)](#)
- [Groups \(Manager v5.1\)](#)
- [User Profiles \(Manager v5.1\)](#)

# User Accounts Overview (Manager v5.1)

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## Overview

For any access to a Transact space that requires authentication, a user must possess a user account. When granted access to one or more Transact spaces, a user is notified of the credentials to use for logging in.

The Transact spaces, including modules, that we are referring to here are:

- Transact Manager
- Transact Maestro
- Transact Insights
- Business Reports
- Salesforce
- Form space such as, *Work Space, Maguire* or your customized form space
- And potentially others

The user account is part of the overall security management system in Transact Manager. A user account allows for fine-grained control according to the functions permitted to the individual user. In Transact Manager, out of the box, are some standard security settings that can be extended and customized as required, such as roles. Users may be granted roles for each space (they have access to), determining the kinds of privileges and capabilities they are given within the space.

For each Transact space, there are specific roles available to be granted to a user. However, as a minimum access requirement to a form space, an end user need only, via his/her user account, be granted access to the form space. That is, no organization or role is necessary to be granted when a user is simply logging in to the form space to access, complete and submit a form. Roles need only be granted to those users who are reviewers and managers in the form space.

Another consideration is the environment (such as production, development and testing) that users are accessing and the legitimate access requirements of each environment. Transact Manager is designed to be customizable to accommodate your enterprise's security configurations and policies.

For instance, the following are common users who will need user accounts that may be associated with a production environment.

- End user will access, complete and submit forms.
- Operational Staff will monitor and manage submissions and jobs.
- Administrator will administer the security.
- Manager will view and analyze reports.
- Other Internal Staff such as a reviewer or manager who may approve or reject applications from customers.

Also, the following are common users who will need user accounts that may be associated with a development and/or testing environment.

- Administrator will administer the security.
- Developer will create and configure forms as well as test them out by simulating an end user.
- Tester will test out form by simulating an end user.
- And more.

A user account is comprised of the following:

Details	About
Personal data	User details
Credentials	User login and password
User type	Depends on valid security managers for your TM (can be "Local", "LDAP" or "SSO")
User profiles	The user contact details (can have more than one user profile)
Spaces	Assigned to the user to authorize access specific spaces (Transact platform spaces and/or form spaces)
Organizations	Assigned to the user to authorize access specific organizations (Transact platform spaces but not relevant for form spaces)
Roles	User belonging to individual roles which specify fine-grained permissions (Transact platform and form space users with responsibilities)
Groups	User belonging to individual groups for authorizing access to restricted forms as well as a means of receiving alerts and notifications pertaining to a work group. (Transact platform and form space users with responsibilities)

# View the List of User Accounts (Manager v5.1)

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Related Pages:

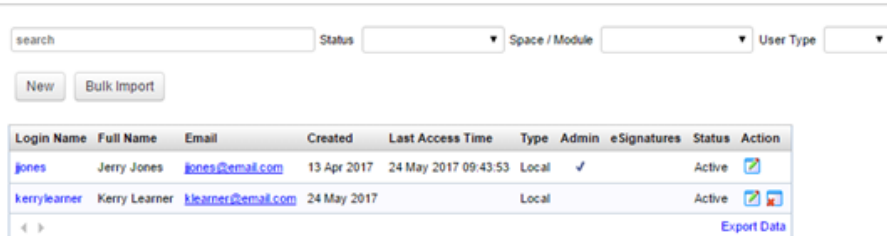
## View the List of User Accounts

To view the list of user accounts that are currently set up in your instance of Transact Manager:

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu. The screenshot below is an example display of a list of User Accounts that exist in an instance of Transact Manager.

### User Accounts

Home Dashboard > User Accounts



Error rendering macro 'contentbylabel'  
com.atlassian.renderer.v2.macro.  
MacroException: Error parsing 'sort' or 'reverse' parameter.

2. When your list of user accounts is long, you may wish to filter the list by one or more of the following:
  - a. Enter a user's given name(s) or family name in the search box (filters on partial name match, but not on the user's full name).
  - b. Select a status from the *Status* dropdown.
  - c. Select a space from the *Space / Module* dropdown.
  - d. Select a user type from the *Type* dropdown.
3. Click the *Search* button.

From this page, for a specific user account, you may perform the following actions:

Icon	Action
	View and/or change (same as clicking on the link in the <i>Login Name</i> column)
	<p>Delete (before choosing to delete a user account please refer to <a href="#">Remove a User Account (Manager v5.1)</a>)</p> <p>You will be prevented from deleting a user account that is the:</p> <ol style="list-style-type: none"> <li>a. User account you are currently logged in as.</li> <li>b. System-generated account, <i>Root Administrator</i>.</li> </ol>

To create a new user account, click the *New* button. This is covered in the [Create a New User Account \(Manager v5.1\)](#) section.

To export your list of user accounts to an excel spreadsheet, click the *Export Data* link.

# Create a New User Account (Manager v5.1)

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## Page Contents:

- [Create a New User Account](#)
- [Options Depending on User Type](#)

## Create a New User Account

New user accounts can be created as needed. Follow the steps below to create a new user account.

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Click *New* button.

The screenshot below displays the *Edit User Account* page (blank when creating a new user account).

The screenshot shows the 'Edit User Account' page. The navigation bar includes tabs for 'User', 'Organizations', 'Spaces', 'Roles', 'Role Expiry', 'Groups', 'Group Expiry', 'User Profiles', and 'Login History'. The 'User' tab is selected. The 'User Details' section contains the following fields and controls:

- Login Name \***: Text input field.
- User Type \***: Dropdown menu with 'Local' selected.
- Password**: Text input field.
- Confirm Password**: Text input field.
- Change Password After Login**: Checkbox.
- Given Name(s) \***: Text input field.
- Family Name \***: Text input field.
- Email**: Text input field.
- Mobile**: Text input field.
- Phone**: Text input field.
- 2 Factor Authentication Required**: Checkbox.
- Spaces \***: Dropdown menu.
- Verify Your Password**: Section with **Your Password \*** text input field.

At the bottom left, there are 'Save' and 'Close' buttons.

3. Enter a login name for the new user in the *Login Name* field (mandatory). *Login Name* is what the user will enter when logging into a Transact product (Maestro, Manager, Composer and/or one or more form spaces). It is recommended that you use an email address. Please be aware that the *Login Name* must be the same as the *Login Name* used for the Maestro cloud instance. If the *Login Name* is not the same, users will not be able to update TM form versions built in Maestro.
4. For the *User Type* dropdown, *Local* is selected by default. You may select a different user type from the *User Type* dropdown (mandatory). The user types are listed below:
  - *Local* for user accounts managed by Transact Manager.
  - *LDAP* (Lightweight Directory Access Protocol) for user accounts managed externally by an LDAP security manager. There must be a security manager set up to managed LDAP security.
  - *SSO* (Single Sign-On) for user accounts managed externally by an SSO security manager. There must be a security manager set up to managed SSO security.

## Options Depending on User Type

Once the user account has been saved, you will be directed to the *Roles* tab. How to assign roles to a user account is explained in the [Assign Roles to User Account \(Manager v5.1\)](#) section.

# Create a Maestro Organization User Manager (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Create a Maestro Organization User Manager

A Maestro Organization User Manager is able to create new users, edit user details and reset passwords. All security actions are conducted in the parent Transact Manager environment.

1. Select the *Security* menu, then click *User Accounts*.
2. Click the *New* button.
3. Fill in the details with the following rules.
  - a. **Login Name** - This is always the user's email address.
  - b. **Password / Confirm Password** - Passwords must be at least 12 characters and be mixed case, contain at least 1 numeric and 1 special character.
  - c. Ensure **Change Password After Login** option is selected.
  - d. **Space** needs to be Transact Manager. Please note you will need to assign an additional space, however that can be done directly from the Spaces tab.

### Edit User Account

Home Dashboard > User Accounts > User Account

**User** Organizations Spaces Roles Role Expiry Groups Group Expiry User Profiles Login History

**User Details**

Login Name \* kwhite.avoka@gmail.com

User Type \* Local ▼

Password \*\*\*\*\*

Confirm Password \*\*\*\*\*

Change Password After Login

Given Name(s) \* Kelly

Family Name \* White

Email \* kwhite.avoka@gmail.com

Mobile

Phone

2 Factor Authentication Required

Spaces \* Transact Manager ▼

**Verify Your Password**

Your Password \*

Save Close

4. Enter your *password* in the field provided.
5. Click *Save*.  
Clicking Save will automatically switch you to the Roles tab.

6. Assign the user the *Organization User Manager* role.

### Edit User Account - kwhite.avoka@gmail.com

Home Dashboard > User Accounts > User Account

User Roles

Available Roles

- Administrator
- Developer
- End User
- Feedback Staff
- kt Staff
- Maestro Administrator
- Maestro Administrators
- Maestro Developer
- Maguire Staff
- Operations
- REST Delivery
- Super Role
- System Manager
- System Support
- TM Fundamentals Staff
- Training Staff

Assigned Roles

- Organization User Manager

Verify Your Password

Your Password\*

Save Close

7. Enter your *password* in the field provided.

8. Click *Save*.

9. Switch to the *Spaces* tab.

From the User tab, you already set the user up with the Transact Manager space. They also need access to the two Transact Maestro spaces, *Transact Maestro* and *Transact Maestro 5.0*.

### Edit User Account - kwhite.avoka@gmail.com

Home Dashboard > User Accounts > User Account

Spaces & Modules

Available

- Business Reports
- Feedback
- kt
- Maguire
- Salesforce
- TM Fundamentals
- Training
- Transact Insights
- TransactField App
- Web Plug-in
- Work Space

Assigned

- Transact Maestro
- Transact Maestro 5.0
- Transact Manager

Verify Your Password

Your Password\*

Save Close

10. Enter your *password* in the field provided.

11. Click *Save*.

12. Switch to the *Organizations* tab.

Assign them to the Organization they belong to. **Do NOT** assign global access.

# Edit User Account - kwhite.avoka@gmail.com

Home Dashboard > User Accounts > User Account

User Organizations Spaces Roles Role Expiry Groups Group Expiry User Profiles Login History

**Available Organizations**

Organizations

**Assigned Organizations**

Australia Maguire Financial Group

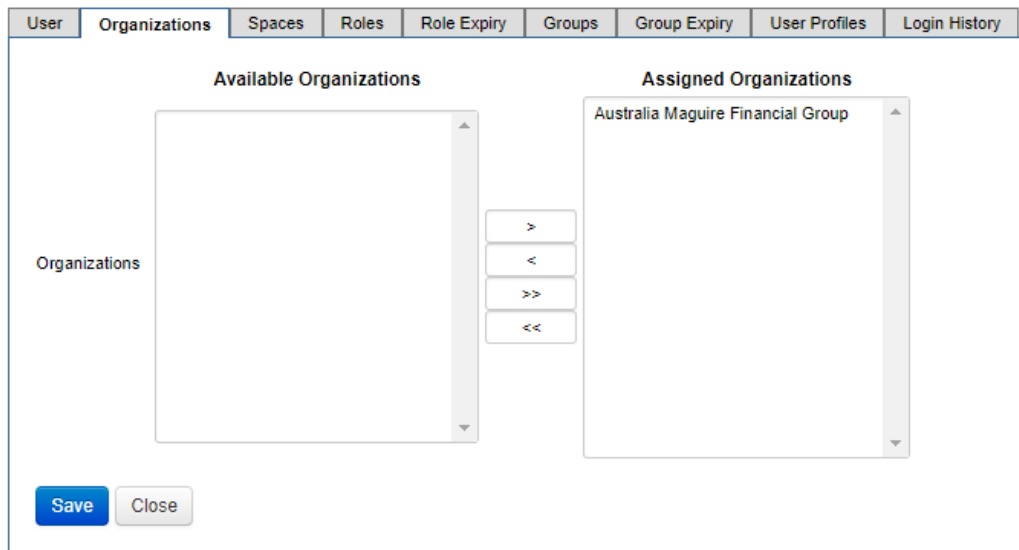
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Save Close



13. Click *Save*.

# Create a New User Account - Quick Guide (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

## Page Contents:

- [Create a New User Account \(Maestro shared environment access only\)](#)
- [Create a New User Account \(Transact Manager access only\)](#)

This is a quick reference guide to creating a new user account based on standard preferences. If you would like more detail about the options available when creating a new user account please see [Create a New User Account \(Manager v5.1\)](#).

## Create a New User Account (Maestro shared environment access only)

This can only be completed by a Maestro Organization User Manager. This person is able to create users for their assigned organization(s).

1. Select the *Security* menu, then click *User Accounts*.
2. Click the *New* button.
3. Fill in the details with the following rules.
  - a. **Login Name** - This is always the user's email address.
  - b. **Password / Confirm Password** - Passwords must be at least 12 characters and be mixed case, contain at least 1 numeric and 1 special character.
  - c. Ensure **Change Password After Login** option is selected.
  - d. **Space** needs to be Transact Maestro. Please note you will need to assign an additional space, however that can be done directly from the Spaces tab.

## Edit User Account

[Home Dashboard](#) > [User Accounts](#) > [User Account](#)

User	Organizations	Spaces	Roles	Role Expiry	Groups	Group Expiry	User Profiles	Login History
<b>User Details</b>								
Login Name *	kwhite.avoka@gmail.com							
User Type *	Local ▼							
Password	*****							
Confirm Password	*****							
Change Password After Login	<input checked="" type="checkbox"/>							
Given Name(s) *	Kelly							
Family Name *	White							
Email *	kwhite.avoka@gmail.com							
Mobile								
Phone								
2 Factor Authentication Required	<input type="checkbox"/>							
Spaces *	Transact Maestro ▼							
<b>Verify Your Password</b>								
Your Password *								
<input type="button" value="Save"/> <input type="button" value="Close"/>								

4. Enter your *password* in the field provided.
5. Click *Save*.  
Clicking Save will automatically switch you to the Roles tab.
6. Assign the user the required *Maestro roles*.  
At the moment there are two roles for Maestro users. TM access is not required, so do not assign TM roles.
  - a. Maestro Developer: This should be the default access given. It will allow most of the functions a user will require.
  - b. Maestro Administrator: This grants a user developer functions and also the ability to create and delete projects, import/export files and libraries.

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

## Edit User Account - kwhite.avoka@gmail.com

Home Dashboard > User Accounts > User Account

**The User Account has been successfully saved. Please assign roles as needed.**

User   Organizations   Spaces   **Roles**   Role Expiry   Groups   Group Expiry   User Profiles   Login History

**User Roles**

**Available Roles**

- Developer
- End User
- Feedback Staff
- kt Staff
- Maestro Administrators
- Maguire Staff
- Operations
- REST Delivery
- System Manager
- TM Fundamentals Staff
- Training Staff
- Transact Insights
- Transact Insights Administrator
- Work Space Staff

**Assigned Roles**

- Maestro Administrator
- Maestro Developer

Roles

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**Save**   **Close**

7. Click *Save*.

8. Switch to the *Spaces* tab.

From the User tab, you already set the user up with the Transact Maestro space. They also need access to the other Transact Maestro space for compatibility mode. For 5.1, you need to add the Transact Maestro 5.0 space.

## Edit User Account - kwhite.avoka@gmail.com

Home Dashboard > User Accounts > User Account

User   Organizations   **Spaces**   Roles   Role Expiry   Groups   Group Expiry   User Profiles   Login History

**Spaces & Modules**

**Available**

- Transact Manager

**Assigned**

- Transact Maestro
- Transact Maestro 5.0

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**Save**   **Close**

9. Click *Save*.

10. Switch to the *Organizations* tab.

Assign them to the Organization they belong to. **Do NOT** assign global access.

## Edit User Account - kwhite.avoka@gmail.com

Home Dashboard > User Accounts > User Account

Available Organizations

Assigned Organizations

Australia Maguire Financial Group

Organizations

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Save Close

11. Click *Save*.

## Create a New User Account (Transact Manager access only)

1. Select the *Security* menu, then click *User Accounts*.
2. Click the *New* button.
3. Fill in the details with the following rules.
  - a. **Login Name** - This is always the user's email address.
  - b. **Password / Confirm Password** - Passwords must be at least 12 characters and be mixed case, contain at least 1 numeric and 1 special character.
  - c. Ensure **Change Password After Login** option is selected.
  - d. **Space** needs to be Transact Manager.

### Edit User Account

Home Dashboard > User Accounts > User Account

User

Organizations Spaces Roles Role Expiry Groups Group Expiry User Profiles Login History

User Details

Login Name\* asmith.avoka@gmail.com

User Type\* Local

Password \*\*\*\*\*

Confirm Password \*\*\*\*\*

Change Password After Login

Given Name(s)\* Alex

Family Name\* Smith

Email\* asmith.avoka@gmail.com

Mobile

Phone

2 Factor Authentication Required

Spaces\* Transact Manager

Verify Your Password

Your Password\*

Save Close

4. Enter your *password* in the field provided.
5. Click *Save*.  
Clicking Save will automatically switch you to the Roles tab.

6. Assign the user the required *Transact Manager* roles.

## Edit User Account - asmith.avoka@gmail.com

Home Dashboard > User Accounts > User Account

**The User Account has been successfully saved. Please assign roles as needed.**

User Organizations Spaces **Roles** Role Expiry Groups Group Expiry User Profiles Login History

**User Roles**

**Available Roles**

- End User
- Feedback Staff
- kt Staff
- Maestro Administrator
- Maestro Administrators
- Maestro Developer
- Maguire Staff
- Operations
- REST Delivery
- System Manager
- TM Fundamentals Staff
- Training Staff
- Transact Insights
- Transact Insights Administrator
- Work Space Staff

**Assigned Roles**

- Developer

Roles

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Save Close

7. Click *Save*.

8. Switch to the *Organizations* tab.

Assign them to the Organization they belong to.

## Edit User Account - asmith.avoka@gmail.com

Home Dashboard > User Accounts > User Account

**The User Account has been successfully saved. Please assign Organizations as needed.**

User **Organizations** Spaces Roles Role Expiry Groups Group Expiry User Profiles Login History

**Available Organizations**

**Assigned Organizations**

- Australia Maguire Financial Group

Organizations

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Save Close

9. Click *Save*.

# Assign Roles to User Account (Manager v5.1)

 Unknown macro: 'redirect'

Related Pages:

## Assign Roles to User Account

Before assigning or de-assigning roles to a user account, it is important to consider:


- As a minimum requirement, for most form end-users (your customers and applicants), simply logging in to the form space will grant them access, allowing them to select and complete forms. No roles are needed to be assigned to these user accounts.
- The types of activities the user will be required to perform within each space. This will differ depending on each space the user will access.
- It is important to understand what activities each of the individual permissions associated with a role is authorizing for the user. Each role has a specific set of permissions controlling what is permissible within each space.
- The role of administrator is a specialized role which gives the user permission to manage the security in Transact Manager.

We may need to assign roles to a user account for:

- Setting up the initial set of roles assigned for a new user account.
- Altering the set of roles by either adding to or removing from the set of roles assigned for an existing user account.

On creating a user account, you will be automatically directed to the *Roles* tab once you have successfully saved the user account details by clicking the *Save* button.

At any stage, to navigate to the *Roles* tab for changing the roles assigned to a user account:

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Login Name* column).
3. Switch to the *Roles* tab.
4. To change the roles assigned to the user account:
  - a. Select the role(s) from the *Available Roles* section (on Windows, use the *Shift* and *Ctrl* keys to select multiple roles).
  - b. Click the *>* to assign roles and/or click the *<* button to remove roles.
  - c. You can also add all available roles to a user account by using the *>>* button. And likewise, the *<<* button will remove all roles, leaving the user account without any privileges.
5. For security reasons, you may have to enter your own password in the *Your Password* field to save changes to the roles. Normally, after creating a user account you will not be required to reenter your password.

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

- Click the *Save* button.  
The roles assigned to a user account take into effect when the user logs in, so changes will be noticeable to the user after logging out of the space and logging in again.

## Edit User Account - cgray

Home Dashboard > User Accounts > User Account

**i** The User Account has been successfully saved. Please assign roles as needed.

User	Organizations	Spaces	Roles	Role Expiry	Groups	Group Expiry	User Profiles	Login History
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**User Roles**

Available Roles		Assigned Roles
<div style="border: 1px solid #ccc; padding: 5px; min-height: 200px;"> <ul style="list-style-type: none"> <li>Administrator</li> <li>End User</li> <li>Feedback Staff</li> <li>kt Staff</li> <li>Maestro Administrator</li> <li>Maestro Administrators</li> <li>Maguire Staff</li> <li>Operations</li> <li>Organization User Manager</li> <li>REST Delivery</li> <li>Super Role</li> <li>System Manager</li> <li>System Support</li> <li>TM Fundamentals Staff</li> <li>Training Staff</li> <li>Transact Insights</li> </ul> </div>	<div style="border: 1px solid #ccc; padding: 5px; width: 40px; margin: 5px auto;">&gt;</div> <div style="border: 1px solid #ccc; padding: 5px; width: 40px; margin: 5px auto;">&lt;</div> <div style="border: 1px solid #ccc; padding: 5px; width: 40px; margin: 5px auto;">&gt;&gt;</div> <div style="border: 1px solid #ccc; padding: 5px; width: 40px; margin: 5px auto;">&lt;&lt;</div>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 200px;"> <ul style="list-style-type: none"> <li>Developer</li> <li>Maestro Developer</li> </ul> </div>
<div style="display: inline-block; margin-right: 10px;"><b>Save</b></div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Close</div>		

More information on roles can be found in the [Roles](#) section.

When an organization administrator changes the role assignments for a user account, they will see only roles where the *Organization Assignable* checkbox is ticked. All other roles will be hidden and unavailable for role assignment to user accounts.

Global administrators, on the other hand, can see and assign all roles to a user accounts (if their own roles contain the permissions around role assignment).

Both global and organization administrators can change the role assignments for their own user accounts. To assist in constraining the individual roles organization administrators are authorized to assign, only roles where the *Organization Assignable* checkbox is ticked will be available (visible) for role assignment to them.

If you suspect that a user account may have been compromised, you can remove all their roles and spaces and make the user account inactive.

# Organizations (Manager v5.1)

 Unknown macro: 'redirect'

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)

## Page Contents:

- [Overview](#)
- [Assign Organizations to User Account](#)
  - [Grant Global Administrator Privileges to User](#)
  - [Remove Global Administrator Privileges from a User](#)

## Overview

Organizations assist in constraining most user's access to forms within Transact Maestro and Transact Manager. For administrators in Transact Manager, organizations assist in constraining what security they can administer. Most administrators are assigned to specific organizations and are known as organization administrators. Organization administrators will administer on behalf of specifically assigned organizations.

Before assigning (or de-assigning) organization(s) to a user account, it is important to consider the following:

- Developers must be granted access to the organizations containing the forms they need to create and update.
- Administrators can be either an organization administrator (for most) or a global administrator. An organization administrator is only allowed to administer on behalf of specific organization(s).

Organization administrators have restricted access privileges. They will only see the subset relevant to the specific organization(s) assigned to their user account. For instance, the *Forms* list in Transact Manager will only show forms belonging to the specifically assigned organization(s).

Organization administrators can also assign only organization assignable roles to other administrators (effectively preventing them from promoting themselves or others to global administrators).


A global administrator on the other hand is not constrained and can administer on behalf of all organizations.

- Operators, are either granted access to specific organizations or to all organizations. Like administrators, operators monitor submissions and jobs on behalf of the specifically assigned organizations or all when globally enabled.
- For form space users, they won't need to be assigned to any organizations as form spaces do not support restrictions based on organizations. When a user is granted access to a form space, he /she will normally view and access all forms pertaining to any organization registered to host forms within that space, unless other restrictions are placed such as form groups.
- Within development and testing environments, it is often necessary to allow users a range of functions. This may be managed according to your enterprise's security policies.

For most users, assigning one or more individual organizations to a user account is advisable. It will allow the user access to the parts only pertaining to the assigned organization(s).

## Assign Organizations to User Account

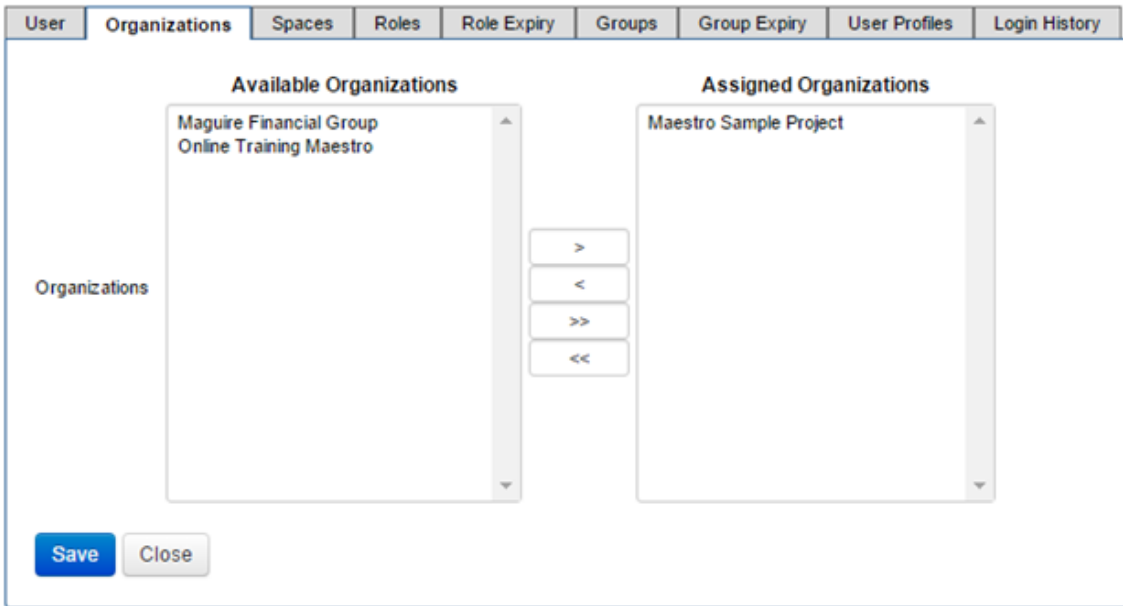
To change the organizations a user account can access:

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon () in the *Action* column or the link in the *Login Name* column).
3. Switch to the *Organizations* tab.  
Where this selected user account is not a global administrator, only the organizations assigned to the user account are displayed in the *Assigned Organizations* section.
4. To change the organizations assigned to a user account:
  - a. Select the organization(s) from the *Available Organizations* section (on Windows, use the *Shift* and *Ctrl* keys to select multiple organizations).
  - b. Click the *>* to assign organization(s) and/or click the *<* button to remove organization(s).
  - c. You can also add all available organizations to a user account by using the *>>* button. And likewise, the *<<* button will remove all organizations, leaving the user account without any privileges.

The list of *Available Organizations* displayed will depend on whether you are logged in as a global administrator or as an organization administrator. Global administrators will have all organizations listed in the *Available Organizations* section, but only those organizations granted to an organization administrator will be listed.

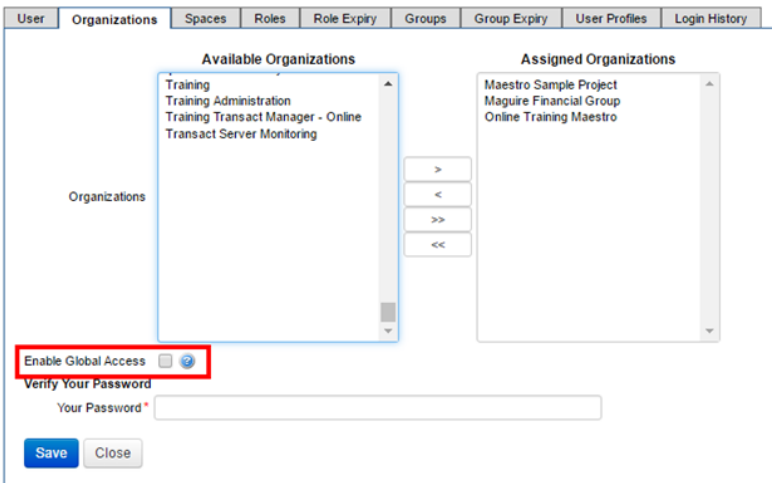
5. For security reasons, you may have to enter your own password in the *Your Password* field to save changes. Normally, after creating a user account you will not be required to reenter your password.
6. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button.

The screenshot below is an example of what the organization administrator will see.




Only a global administrator can grant the same privilege of global administrator to another user.

Therefore, only global administrators will, in addition, see an *Enable Global Access* checkbox in the *Organizations* tab, as shown in the screenshot below. Remember, for this user to function as an administrator, you will also need to grant the appropriate roles and spaces to his/her user account.



## Grant Global Administrator Privileges to User

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Login Name* column).
3. Switch to the *Organizations* tab.
4. Select the *Enable Global Access* checkbox.  
The above example shows a user account that has been granted access to the organizations in the *Assigned Organizations* section. By selecting *Enable Global Access*, the organizations in the *Assigned Organizations* section will revert to the *Available Organizations* section and it is no longer possible to assign organizations individually to this user account (disabled). That is, either this user account is for a global administrator or for an organization user. For a global administrator user account, it is assumed that all organizations are assigned to it.
5. For security reasons, you may have to enter your own password in the *Your Password* field to save changes. Normally, after creating a user account you will not be required to reenter your password.

6. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button.

User Organizations Spaces Roles Role Expiry Groups Group Expiry User Profiles Login History

Available Organizations

Training  
Training Administration  
Training Transact Manager - Online  
Transact Server Monitoring

Assigned Organizations

Maestro Sample Project  
Maguire Financial Group  
Online Training Maestro

Organizations

Enable Global Access

Verify Your Password

Your Password\*

Save Close

## Remove Global Administrator Privileges from a User

To remove global administrator privileges from a user, from the *Organizations* tab:

1. Deselect *Enable Global Access* checkbox.
2. For security reasons, you may have to enter your own password in the *Your Password* field to save changes. Normally, after creating a user account, you will not be required to reenter your password.
3. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button.
4. Once you have saved, it is possible to reassign individual organizations to this user account as explained above.



If you disable global access for your own user account, it can only be reinstated by another global administrator.

# Spaces (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)

## Page Contents:

- [Overview](#)
- [Change the Spaces Assigned to a User Account](#)

## Overview

There are different classes of spaces managed by Transact Manager, where the majority enforce access by logging in. These spaces require users to log in with their registered user account credentials. A user account may only be used to log into a space when it has been assigned that space.

On the other hand, it is not applicable to assign a Transact form space that is only accessed anonymously (not requiring to be accessed by logging in), to a user account.


There are several main classes of users that we need to accommodate. The following is an example of the spaces each class of users may need to access:

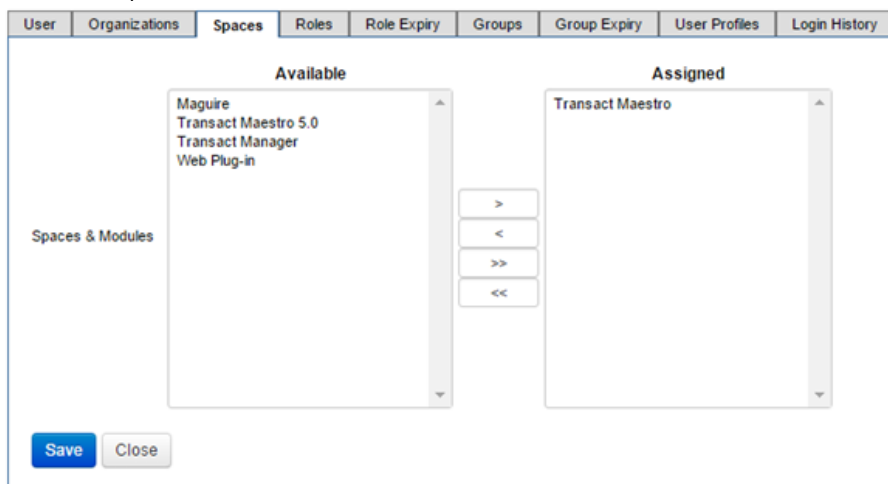
- End-users, who only need to login to form space(s).
- Developers, who may need a combination of logins to some or all:
  - Transact Maestro (must assign both *Transact Maestro* and *Transact Maestro 5.0* spaces)
  - Transact Manager
  - Transact Insights
  - Business Reports
  - Salesforce
  - Form space(s)
- Administrators, who only need to login to Transact Manager.
- Testers, who only need to login to form space(s).
- Operators, who only need to login to Transact Manager.
- Managers, who may need a combination of logins to some or all:
  - Transact Insights
  - Business Reports
  - Salesforce
  - Form space(s)

It is also possible for a form space to permit users requiring a login to self-register to the space. When users opt to self-register, they will be presented with a registration page to enter their details.

## Change the Spaces Assigned to a User Account

To change the spaces a user account can access, follow the steps below.

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Login Name* column).
3. Switch to the *Spaces* tab.



4. The assigned spaces for this user account are displayed in the *Assigned Spaces & Modules* section.
  - a. Select the space(s) from the *Available Spaces & Modules* section (on Windows, use the *Shift* and *Ctrl* keys to select multiple spaces).

- b. Click the > to assign space(s) and/or click the < button to remove space(s).
- c. You can also add all available spaces to a user account by using the >> button. And likewise, the << button will remove all spaces, leaving the user account without any privileges.

The list of *Available Spaces & Modules* displayed will depend on whether you are logged in as a global administrator or as an organization administrator. Global administrators will have all spaces listed in the *Available Spaces & Modules* section, but only those spaces granted to an organization administrator will be listed.

5. For security reasons, you may have to enter your own password in the *Your Password* field to save changes. Normally, after creating a user account, you will not be required to reenter your password.
6. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button.

# Change a User Account (Manager v5.1)

 Unknown macro: 'redirect'


## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Change a User Account

A user account may need to be updated, such as changing the user's contact details, resetting a password or changing the status of a user account. We've already covered all the tabs associated with a user account that can be accessed at any time, *Organizations*, *Spaces*, *Roles*, *Role Expiry* and *User Profiles*. Here we're only covering editing the user account from the main *Usertab*.

To change a user account:

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon () in the *Action* column or the link in the *Login Name* column).
3. Update any of account details as required:
  - a. *Login Name*
  - b. *Password* to reset password
  - c. *Confirm Password* when resetting password (must match Password entered)
  - d. *Change Password After Login*
  - e. *Given Name(s)*
  - f. *Family Name*
  - g. *Email*
  - h. *Mobile*
  - i. *Phone*
  - j. Select *Email Verification Required* to send a verification email to the user requiring email verification when logging in for the first time.
  - k. *2 Factor Authentication Required*
    - l. Select the status from the *Account Status* dropdown.
4. Click *Save* button if you wish to save any changes made, otherwise click *Close* button.

# Remove a User Account (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Page Contents:

- [Remove a User Account](#)
- [Deactivate a User Account](#)
- [Delete a User Account](#)

## Remove a User Account


If you wish to disable a user account, you have two options, you can:

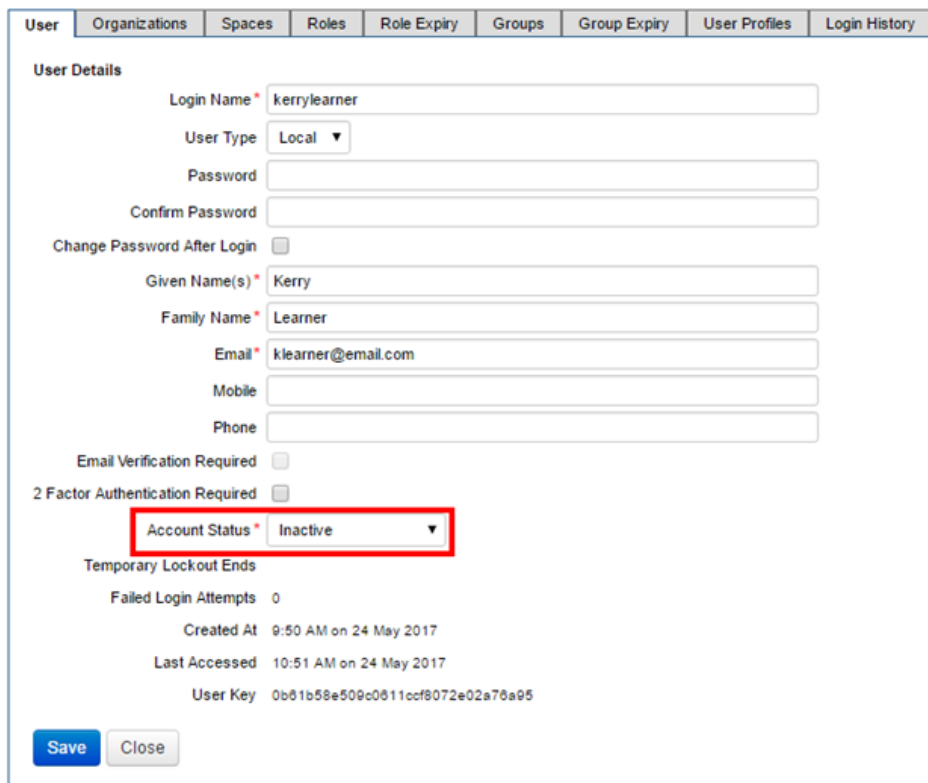
1. Deactivate the account, to prevent a user to log in using his/her credentials, but will preserve the user details in Transact Manager.
2. Delete the user account, which irrevocably removes all data associated with the user account.

Note that submissions made by a user will be preserved even after their user account is deleted. However, these submissions will not be associated with a user any more. Therefore, in most cases it is advisable to deactivate rather than delete a user account. As all user account details are preserved when deactivating a user account, this may be reversed by reactivating the user account, if needed, at any time.

## Deactivate a User Account

To deactivate a user account:

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Login Name* column).
3. Select *Inactive* from the *Account Status* dropdown.
4. Click *Save* button if you wish to save any changes made, otherwise click *Close* button.  
The user account details will still exist, but the user can no longer log in or access restricted content. To reactivate the user, simply edit the user account and choose *Active* from the *Account Status* dropdown, then save.



User	Organizations	Spaces	Roles	Role Expiry	Groups	Group Expiry	User Profiles	Login History
------	---------------	--------	-------	-------------	--------	--------------	---------------	---------------

**User Details**

Login Name \* kerrylearner

User Type Local

Password

Confirm Password

Change Password After Login

Given Name(s) \* Kerry

Family Name \* Learner

Email \* klearner@email.com

Mobile

Phone

Email Verification Required

2 Factor Authentication Required

Account Status \* Inactive

Temporary Lockout Ends

Failed Login Attempts 0

Created At 9:50 AM on 24 May 2017

Last Accessed 10:51 AM on 24 May 2017


User Key 0b81b58e509c0611ccf8072e02a78a95

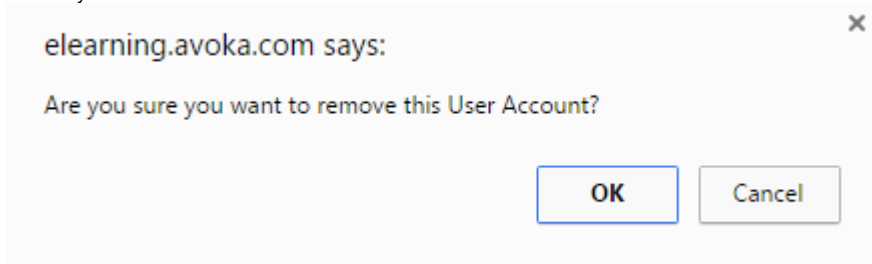
Save Close

## Delete a User Account

To delete a user account, follow the steps below.

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.

2. Click the *Delete* icon (  ) in the *Action* column next to the user account. Since this operation will permanently remove all the user account details, you will be asked to confirm your decision.



Note that you cannot delete the user you are currently logged in as, nor can the system-generated account *Root Administrator* be deleted.

Even after a user account has been deleted, the changes the user made to the system are still visible in the audit log.

# Roles (Manager v5.1)

Unknown macro: 'redirect'

## Roles

A role in Transact Manager is a legitimate function performed within an individual space.

Transact Manager comes with a super administrator role with all permissions related to the Transact Manager console. As a Transact Manager Administrator, you can create new roles and modify existing roles to suit your needs.

When Transact Manager starts up for the first time (or whenever there are no roles defined in Transact Manager), it will automatically create the following set of standard roles.

- A root administrator role with all permissions
- A form developer role
- An operations monitoring role
- An organization user manager role
- A system support role

As an administrator, you have permissions to customize these roles to suit your specific needs, or set up new roles.

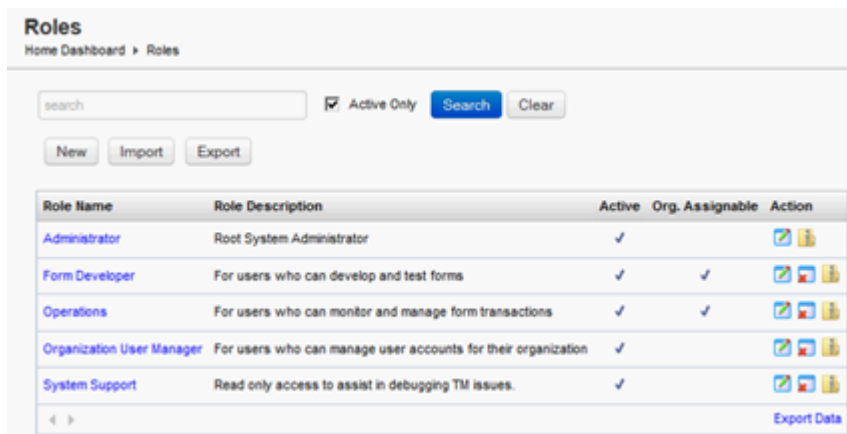
## View the List of Roles

Transact Manager allows administrators to view the list of available TM roles.

To view the list of roles that are currently set up in your instance of Transact Manager:

1. Navigate to *Security* from the menu bar, and then click *Roles* from the dropdown menu. The screenshot below is an example display of a list of roles.
2. When your list of roles is long, you may wish to filter the list by entering a substring of the role name in the search box. Also by default, only active roles are listed (*Active Only* checkbox is ticked). If you wish to also see the inactive roles listed as well, deselect the *Active Only* checkbox.

If you are logged in as a global administrator, you will see all roles listed as shown in the example screenshot below.



Icon	Action
	View and/or change (same as clicking on the link in the <i>Role Name</i> column)
	Delete (before choosing to delete a role please refer to <a href="#">Remove a Role (Manager v5.1)</a> section) The <i>Administrator</i> role cannot be deleted.
	Export the role.

To create a new role, click the *New* button. This is covered in the [Create a New Role](#) section.

You can export roles and permissions assigned to them, to be imported to a different Transact Manager instance or for backup purposes. To learn about how to export and import roles, please refer to the [Multi-Environment \(Manager v5.1\)](#), [Migrate Roles](#) section.

From the roles list page, organization administrators are only able to view the list of organization assignable roles and export this list to an Excel spreadsheet. They will not be able to create, update or delete roles including exporting and importing (the zip files by *Import* and *Export* buttons as well as individually by export icon).

# Create a New Role (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Create a New Role

New roles can be created as needed. Follow the steps below to create a new role.

1. Navigate to *Security* from the menu bar, and then click *Roles* from the dropdown menu.
2. Click the *New* button.  
The screenshot below displays the *Edit Role* page (blank when creating a new role).

### Edit Role

Home Dashboard ▶ Role

The screenshot shows the 'Edit Role' form with the following fields and options:

- Name \***: A text input field.
- Description**: A text input field.
- Active**: A checked checkbox with a help icon.
- Organization Assignable**: An unchecked checkbox with a help icon.
- Buttons**: 'Save' and 'Close' buttons.

3. Enter a name for the new role in the *Name* field (mandatory).
4. Enter a suitable description in the *Description* field (optional).
5. By default, *Active* checkbox is ticked. You may wish to deselect *Active* checkbox if this role is to be unavailable for the time being. That is, inactive roles cannot be assigned to user accounts until they have been reactivated.
6. Select *Organization Assignable* checkbox to permit organization administrators to assign this role to user accounts.  
To only authorize global administrators to assign this role to user accounts, keep the *Organization Assignable* checkbox unticked. An organization administrator will not be able to see unticked *Organization Assignable* roles listed in his/her roles list page.
7. Click the *Save* button.

Below is a screenshot for an example of creating a new role.

### Edit Role

Home Dashboard ▶ Role

The screenshot shows the 'Edit Role' form with the following fields and options:

- Name \***: Submission Viewer
- Description**: Can view submissions and associated data
- Active**: Checked checkbox with a help icon.
- Organization Assignable**: Unchecked checkbox with a help icon.
- Buttons**: 'Save' and 'Close' buttons.

As explained above for the *Organization Assignable* checkbox, this *Submission Viewer* role can only be assigned to a user account by a global administrator.

Once saved, you will then need to assign permissions to this role.

# Assign Permissions to a Role (Manager v5.1)



## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Assign Permissions to a Role

When first creating a role, you will need to assign it new permissions. Also, the set of permissions assigned to an existing role may need to change to reflect additional or reduced privileges.

To assign or de-assign permissions to an existing role, follow steps 1 and 2, otherwise skip to step 3:

1. Navigate to *Security* from the menu bar, and then click *Roles* from the dropdown menu.
2. Find and select the role from the list (either click the *Edit* icon in the *Action* column or the link in the *Role Name* column).
3. Switch to the *Permissions* tab. See the screenshot below.

The set of permissions that are applicable to a space is first listed in the *Available* section, and if assigned to this role, the assigned permission will be listed in the *Assigned* section.

Select each space from the *Spaces & Modules* dropdown to view the available and assigned permission for this space and role. You will notice that not all spaces and modules are included in this dropdown. The spaces where access is managed by roles and their associated permissions are applicable and the missing spaces are not applicable to have permission assigned to roles.

A newly created role will not yet have any assigned permissions for any of the spaces.

4. To change the permissions assigned to a role, select each space, from the *Spaces & Modules* dropdown, for which this role requires permissions and:
  - a. Select the permission(s) from the *Available Permissions* section (on Windows, use the *Shift* and *Ctrl* keys to select multiple permissions).
  - b. Click the *>* to assign permission(s) and/or click the *<* button to remove permission(s).
  - c. You can also add all available permissions to a role by using the *>>* button. And likewise, the *<<* button will remove all permissions, leaving the role without any privileges.
5. For security reasons, you may have to enter your own password in the *Your Password* field to save changes.

6. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button. All permissions assigned to a role are loaded when the user logs in. In other words, any changes will be visible to users as soon as they log out and then log back into the space.

## Edit Role

Home Dashboard > Roles > Role

Role Permissions Members

Spaces & Modules Maguire

**Available**

Collaboration Job Completed View  
Collaboration Job View  
Help Desk Authenticated Edit  
Help Desk View

**Assigned**

Permissions

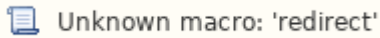
>  
<  
>>  
<<

Verify Your Password

Your Password\*

Save Close

# Manage Role Members (Manager v5.1)



Related Pages:

## Manage Role Members

As an administrator, you can view and modify the list of user accounts that are currently assigned to a role (role members). Role membership may also be viewed as well as be assigned and de-assigned from the individual user account (refer to [Assign Roles to User Account](#)).

When first creating a role, you may wish to assign it role members. Also, for an existing role, you may need to reflect membership changes as in assigning new members and de-assigning existing members.

To assign or de-assign role membership to an existing role, follow steps 1 and 2, otherwise skip to step 3:

1. Navigate to *Security* from the menu bar, and then click *Roles* from the dropdown menu.
2. Find and select the role from the list (either click the *Edit* icon in the *Action* column or the link in the *Role Name* column).
3. Switch to the *Members* tab. See the screenshot below.

The set of user accounts is first listed in the *User Accounts* section, and if assigned to this role, will be listed in the *Role Members* section.

A newly created role will not yet have any assigned role members.

4. To change the user accounts assigned to a role:
  - a. Select the user account(s) from the *User Accounts* section (on Windows, use the *Shift* and *Ctrl* keys to select multiple user accounts).
  - b. Click the *>* to assign user account(s) and/or click the *<* button to remove user account(s).
  - c. You can also add all available user accounts to a role by using the *>>* button. And likewise, the *<<* button will remove all user accounts, leaving the role without any role membership.
5. For security reasons, you may have to enter your own password in the *Your Password* field to save changes.

Error rendering macro  
'contentbylabel'

com.atlassian.renderers.

v2.macro.

MacroException: Error  
parsing 'sort' or

'reverse' parameter.

6. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button. All user accounts assigned to a role are loaded when the user logs in. In other words, any changes will be visible to users as soon as they log out and then log back into the space.

## Submission Viewer

Home Dashboard ▶ Roles ▶ Role

Role   Permissions   **Members**

### User Accounts

- adminavoka
- administrator
- asmith
- cgray
- jberry
- jwilson
- kwhite
- sgreen
- sjones
- swilliams
- tbrown

### Role Members

>

<

>>

<<

Verify Your Password

Your Password\*

**Save**   Close

# Remove a Role (Manager v5.1)




## Page Contents:

- [Overview](#)
- [Deactivate a Role](#)
- [Delete a Role](#)

## Overview

If you wish to disable a role, you have two options, you can:

1. Deactivate the role, to prevent a user account being assigned to this role and, until it is reactivated, it will not confer any permissions. The role details are preserved and may be reactivated in Transact Manager, as and when required.


 Please note you can still assign role membership via the *Security > Roles > selected inactive role > Members* tab. The above option is only applied as described when assigning the inactive role via the *Security > User Accounts > selected user account > Roles* tab.

2. Delete the role, which irrevocably removes all data associated with the role.

In most cases, it would be recommended to deactivate the role.


## Deactivate a Role


To deactivate a role:

1. Navigate to *Security* from the menu bar, and then click *Role* from the dropdown menu.
2. Find and select the role from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Role Name* column).
3. Deselect the *Active* checkbox.
4. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button. The role details will still exist, but the role does not confer any permissions. To reactivate the role, simply edit the role and select the *Active* checkbox, then save.

## Delete a Role

To delete a user account, follow the steps below.

1. Navigate to *Security* from the menu bar, and then click *Roles* from the dropdown menu.
2. Click the *Delete* icon (  ) in the *Action* column next to the role. Since this operation will permanently remove all role details, you will be asked to confirm your decision.

 Note that you cannot delete the system-generated *Administrator* role.

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

# Configure Role Expiry for a User Account (Manager v5.1)

Unknown macro: 'redirect'


## Related Pages:

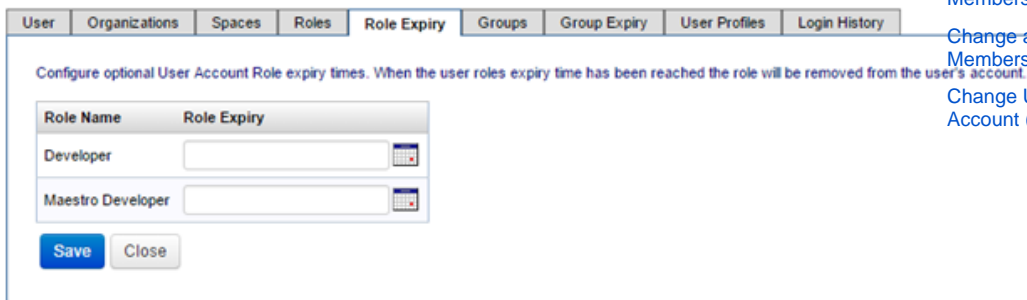
- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)


## Configure Role Expiry for a User Account

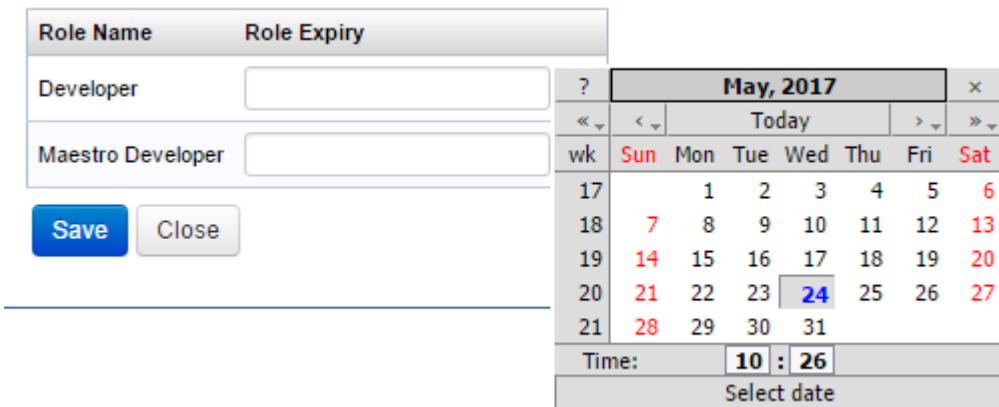
At times, it may be better to temporarily assign a role to a user, such as when allowing Avoka support to assist in debugging a problem. Within Transact Manager, it is possible to enforce an expiry time to a user's role.

To enforce a time limit on a user's role:

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Login Name* column).
3. Switch to the *Role Expiry* tab.  
This will display a list of all the assigned roles (in *Role Name* column) for the selected user account. Any temporary role assignments will show an expiry date in the *Role Expiry* column.



4. To set an expiry date for a user's role, click the calendar icon (  ) in the *Role Expiry* column.  
This will display a calendar pop up as shown in the screenshot below.



5. Select a date and time for when this user's role must expire.  
You should select the time first (if needed), as the pop up will automatically close on selection of a date.  
Alternatively, you may remove an expiry date and time for a user's role by deleting the entered date and time.
6. Save your changes.  
When the expiry time arrives, the background job *Security Policy Manager* (see *The Security Policy Manager Job in Scheduled Jobs*) will remove the role from the user account.

# Groups (Manager v5.1)

 Unknown macro: 'redirect'

## Related Pages:

### Page Contents:

- [Groups](#)
- [Form Work Groups](#)
- [View the List of Groups](#)

## Groups

Users may be put into groups to support certain functions and responsibilities. For instance, a reviewer who approves or rejects an application form may need to belong to a reviewer group. The groups extend the privileges defined through roles and permissions by establishing working groups.

In Transact Manager, a group of user accounts represents one of the following work groups:

- **Form** Giving restricted access to forms and/or tasks that are associated with a group.
- **Alert** Notifying and alerting a group about certain events.

## Form Work Groups

Groups that control access to forms are called form work groups.

All users within a form work group share the forms and/or tasks assigned to the group.

For each form work group, you may specify further rights and privileges.

Users belonging to a form work group can:

- Share access to a set of forms that all members of the group can open and submit, but that are not accessible to non-members.
- Share tasks and incomplete (e.g. saved) submissions for the forms in the group, meaning that each group member can see drafts submitted by other members and complete these draft forms even if they were not the initial submitters. All form work group members will be assigned tasks and individually notified, but only one member will be able to complete. This is usually handled by a collaboration job.
- See all completed submissions of group forms by other group members and, if configured, access the receipt for these submissions.

## View the List of Groups

Transact Manager allows administrators to view the list of available TM roles.

To view the list of roles that are currently set up in your instance of Transact Manager:

1. Navigate to *Security* from the menu bar, and then click *Groups* from the dropdown menu. The screenshot below is an example display of a list of groups.
2. When your list of groups is long, you may wish to filter the list by entering a substring of the group name in the search box. You may also filter the list of groups by selecting *Form* or *Alert* from the *Type* dropdown. A set of standard alert groups are predefined and cannot be renamed or deleted.

### Error rendering macro 'contentbylabel'

com.atlassian.renderer.

v2.macro.

MacroException: Error

parsing 'sort' or

'reverse' parameter.

## Groups

Home Dashboard > Groups

search  Type

Group Name	Type	Description	Form Work Group	New Forms	Saved / Assigned	Completed Forms	Reassign Task	Action
Job Applicants	Form	Job Applicants	✓	✓	✓	✓		
Job Applicants AKH	Form		✓	✓	✓	✓		
Job Applicants CT	Form		✓	✓	✓	✓		
Job Applicants JCD	Form		✓	✓	✓	✓		
Job Applicants JXH	Form		✓	✓	✓	✓		
Job Managers	Form	Authorized Job Managers	✓	✓	✓	✓	✓	
Job Managers AKH	Form		✓	✓	✓	✓	✓	
Job Managers JCD	Form		✓	✓	✓	✓		
Job Managers JXH	Form		✓	✓	✓	✓	✓	
Job Reviewers	Form	Authorized Job Reviewers	✓		✓	✓		
Job Reviewers AKH	Form		✓		✓	✓		
Job Reviewers CT	Form		✓		✓	✓		
Job Reviewers JCD	Form		✓	✓	✓	✓		
Job Reviewers JXH	Form		✓		✓	✓		
My stuff only	Form			✓	✓	✓	✓	
US Public Managers	Form	Angie's collaboration example	✓		✓	✓	✓	
Receive Delivery Escalation Alerts	Alert	Receive submission delivery escalation alert emails						
Receive Outstanding Payment Alerts	Alert	Receive payment alerts for unpaid submissions						
Receive Promotion Alerts	Alert	Receive form promotion alert emails						
Receive Submission Updates	Alert	Receive submission status update notification emails						

< 1-20 of 24 [Export Data](#)

Icon	Action
	View and/or change (same as clicking on the link in the <i>Group Name</i> column)
	Delete (you will be asked to confirm your decision) The standard set of alert groups cannot be deleted.
	Export the group.

To create a new group, click the *New* button. This is covered in the [Create a New Group \(Manager v5.1\)](#) section.

You can export groups, to be imported to a different Transact Manager instance or for backup purposes. To learn about how to export and import groups, please refer to the [Multi-Environment \(Manager v5.1\)](#), [Migrate Groups \(Manager v5.1\)](#) section.

# Create a New Group (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)

## Create a New Group

New groups can be created as needed. Follow the steps below to create a new group.

1. Navigate to *Security* from the menu bar, and then click *Groups* from the dropdown menu.
2. Click the *New* button.  
The screenshot below displays the *Edit Group* page (blank when creating a new group).

### Edit Group

[Home Dashboard](#) > [Groups](#) > [Group](#)

The screenshot shows the 'Edit Group' form with the following fields and options:

- Name \***: A text input field with a red asterisk indicating it is mandatory.
- Type \***: A dropdown menu with a red asterisk indicating it is mandatory. A help icon is visible to the right.
- Description**: A text input field.
- Buttons**: 'Save' (blue) and 'Close' (grey) buttons.

[Change a User Account \(Manager v17.10\)](#)

[Change a User Account \(Manager v5.1\)](#)

[Change a User's Group Membership \(Manager v17.10\)](#)

[Change a User's Group Membership \(Manager v5.1\)](#)

[Change User Profile for a User Account \(Manager v17.10\)](#)

3. Enter a suitable name for your new group in the *Name* field (mandatory).
4. Select *Form* or *Alert* from the *Type* dropdown (mandatory).
5. Enter a description of your new group in the *Description* field (optional)  
For form work groups (selected *Type = Form*), additional entry fields (*Group User Access Control* section) will appear as shown in the following screenshot:

### Edit Group

[Home Dashboard](#) > [Groups](#) > [Group](#)

The screenshot shows the 'Edit Group' form with the following fields and options:

- Name \***: Credit Card Managers
- Type \***: Form
- Description**: Managers for approving credit card applications
- Group User Access Control**
  - Share with Work Group
  - New Forms
  - Saved / Assigned Forms
  - Completed Forms
  - Reassign Task
- Buttons**: 'Save' (blue) and 'Close' (grey) buttons.

6. For *Group User Access Control* section:
  - a. Select *Share with Work Group* to allow users of this work group to share a form.
  - b. Select *New Forms* to allow users to actively start filling in forms belonging to the group (otherwise they cannot access the forms at all, except when tasks are assigned to the group and the group is configured to share tasks and incomplete submissions).
  - c. Select *Saved / Assigned Forms* to allow sharing of tasks assigned to the group as well as incomplete submissions for these forms.
  - d. Select *Completed Forms* to allow sharing of the list of completed submissions and access to receipts.
  - e. Select *Reassign Task* to allow members to reassign task submissions to other users within the form work group.
7. Click the *Save* button.  
Now you may start assigning forms and users to the form work group.

# Manage Group Members (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Manage Group Members

When first creating a group, you may wish to assign it group members. Also, when changing an existing group's membership, you may wish to assign and, at times, you may wish to de-assign group membership.

To assign or de-assign group membership to an existing group, follow steps 1 and 2, otherwise skip to step 3:

1. Navigate to *Security* from the menu bar, and then click *Groups* from the dropdown menu.
2. Find and select the group from the list (either click the *Edit* icon in the *Action* column or the link in the *Group Name* column).
3. Switch to the *Members* tab. See an example screenshot below.  
The set of user accounts is first listed in the *User Accounts* section, and if assigned to this group will be listed in the *Group Members* section.  
A newly created group will not yet have any assigned group members.
4. To change the user accounts assigned to a group:
  - a. Select the user account(s) from the *User Accounts* section (on Windows, use the *Shift* and *Ctrl* keys to select multiple user accounts).
  - b. Click the *>* to assign user account(s) and/or click the *<* button to remove user account(s).
  - c. You can also add all available user accounts to a group by using the *>>* button. And likewise, the *<<* button will remove all user accounts, leaving the group without any group membership.
5. For security reasons, you may have to enter your own password in the *Your Password* field to save changes.
6. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button.

## Edit Group

Group Members

Group

Forms

Members

User Accounts

Group Members

adminavoka  
administrator  
asmith  
cgray  
jberry  
jwilson  
kwhite  
sgreen  
sjones  
williams  
tbrown

>  
<  
>>  
<<


Verify Your Password

Your Password \*

Save Close



# View Forms Assigned to a Form Group (Manager v5.1)

 Unknown macro: 'redirect'

## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## View Forms Assigned to a Form Group



When first creating a form group, there won't yet be any forms assigned to this group.

To restrict access to a form, assign it to a form group by following the steps below.

1. Create the new form group.
2. Assign user accounts to the form group.
3. Assign this group to your form to be restricted to the group members.

When a form group has been granted authorized access to one or more forms, it will be listed in the *Forms* tab from the *Edit Group* page.

To view the forms that a form group has been granted authorized access to:

1. Navigate to *Security* from the menu bar, and then click *Groups* from the dropdown menu.
2. Find and select the group from the list (either click the *Edit* icon () in the *Action* column or the link in the *Group Name* column).
3. Switch to *Forms* tab. See an example screenshot below.
4. If you wish to revoke form group access to one of the forms listed, then click the delete icon () next to that form. This only removes to group form access privilege and not the form itself.

# Pre-Defined Alert Groups (Manager v5.1)

 Unknown macro: 'redirect'

Related Pages:

## Pre-Defined Alert Groups

Transact Manager comes with several pre-defined alert groups:

- 1. Receive Delivery Escalation Alerts**  
Members of this group will be notified when submissions with secure email delivery have not been acknowledged after a certain period (for the exact rules, see [Delivery Channels](#), [Create a Delivery Channel > Email Secure](#)).
- 2. Receive Outstanding Payment Alerts**  
Members of this group will be notified when there are submissions with outstanding payments for their organization. This group is relevant only if administrators wish to monitor submissions for those that are abandoned at the payment stage (e.g. to contact the applicant and offer assistance).
- 3. Receive System Alerts**  
Members of this group will be notified when the System Monitoring job finds that important system jobs are impacted.
- 4. Receive Submission Updates**  
Members of this group will be notified when the processing status for a submission they have made has been updated. This group is relevant only to form users, not administrators.
- 5. Receive System Alerts - Delivery**  
Members of this group will be notified when submission delivery fails.
- 6. Receive System Alerts - Receipts**  
Members of this group will be notified when submission receipt generation fails.
- 7. Receive User Account Creation Alerts**  
Members of this group will be notified when a user has applied for an account on a user space.

Error rendering macro

'contentbylabel'

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v2.macro.

MacroException: Error

parsing 'sort' or

'reverse' parameter.

# Change a User's Group Membership (Manager v5.1)


Unknown macro: 'redirect'

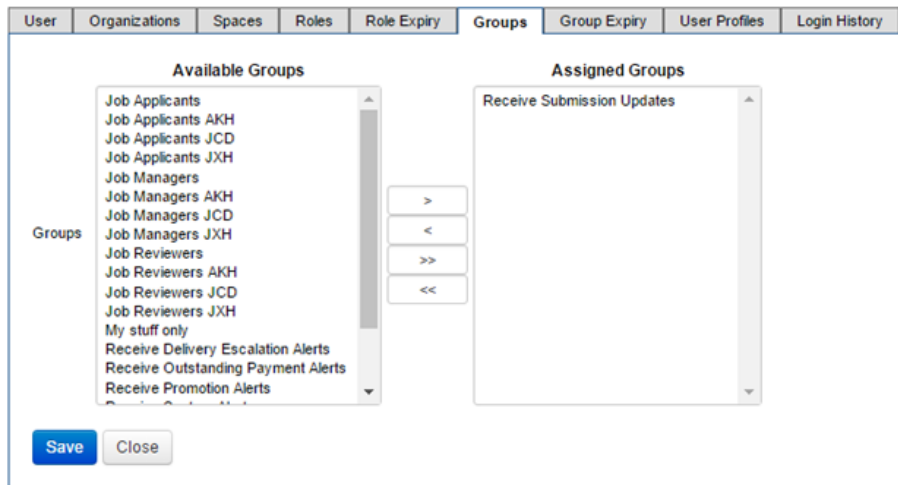
## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Change a User's Group Membership

To change the user's group membership, follow the steps below.

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Login Name* column).
3. Switch to the *Groups* tab.



4. The assigned groups for this user account are displayed in the *Assigned Groups* section. To change the assigned groups:
  - a. Select the space(s) from the *Available Groups* section (on Windows, use the *Shift* and *Ctrl* keys to select multiple spaces).
  - b. Click the *>* to assign group(s) and/or click the *<* button to remove group(s).
  - c. You can also add all available groups to a user account by using the *>>* button. And likewise, the *<<* button will remove all groups, leaving the user account without any privileges.  
The list of *Available Groups* displayed will depend on whether you are logged in as a global administrator or as an organization administrator. Global administrators will have all groups listed in the *Available Groups* section, but only those groups granted to an organization administrator will be listed.
5. For security reasons, you may have to enter your own password in the *Your Password* field to save changes. Normally, after creating a user account, you will not be required to reenter your password.
6. Click the *Save* button if you wish to save any changes made, otherwise click *Close* button.

# Configure Group Expiry for a User Account (Manager v5.1)

Unknown macro: 'redirect'


## Related Pages:


- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Configure Group Expiry for a User Account

At times, it may be better to temporarily assign a group to a user, such as when allowing Avoka support to assist in debugging a problem that requires the user to be a member of group. Within Transact Manager, it is possible to enforce an expiry time to a user's group.

To enforce a time limit on a user's group:

- Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
- Find and select the user account from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Login Name* column).
- Switch to the *Group Expiry* tab. It will display a list of all the assigned roles (in *Group Name* column) for this user account. Any temporary group assignments will show an expiry date in the *Group Expiry* column.

- To set an expiry date for a user's group, click the calendar icon (  ) in the *Group Expiry* column. This will display a calendar pop up.

July, 2017							
Today							
wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
25							1
26	2	3	4	5	6	7	8
27	9	10	11	12	13	14	15
28	16	17	18	19	20	21	22
29	23	24	25	26	27	28	29
30	30	31					

Time: 09 : 54  
Select date

- Select a date and time for when this user's group must expire.

You should select the time first (if needed), as the pop up will automatically close on selection of a date.

Alternatively, you may remove an expiry date and time for a user's group by deleting the entered date and time.

- Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button. When the expiry time arrives, the background job *Security Policy Manager* (see in [Scheduled Jobs](#) section, *The Security Policy Manager Job*) will remove the group from the user account.

# User Profiles (Manager v5.1)

 Unknown macro: 'redirect'

## User Profiles

A user profile is a set of contact details for a user account which is mainly used for prefilling forms. These user profile details may be maintained by an administrator from within Transact Manager or by the user who is logged into a form space that supports user profile management (the standard *Account* tab in form space). Users and TM administrators can create and manage one or more user profiles for a user account.

When logged into the form space (if the standard *Account* tab is available), users may:

- Update their contact details registered on a user profile.
- Create more than one user profile.
- Elect another user profile to be the default (when more than one exists).
- Delete a user profile.

An administrator is also able to view and manage user profiles from within Transact Manager.

A user account, when it's first created, will automatically create a default user profile, named *My Profile*, containing a copy of the following fields entered about the user:

- *Given Name*
- *Family Name*
- *Email*
- *Mobile* (except will be blank when the user account is created by self-registering, as the user is not able to enter a mobile number on initial registration but is able to update it)

### Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

# User Property Types (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

## User Property Types

A user profile is comprised of a set of fields that are defined and maintained as user property types in Transact Manager. That is, property types where the property scope is set to *User*.

Out of the box, Transact Manager already comes with each of the above standard user profile fields corresponding to a property type of property scope, *User*. Each user property type will be available to all user profiles for maintaining both in TM (by administrator) and the form space (by user, if supported). Below is the list of standard property types.

Error rendering macro  
'contentbylabel'









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macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

## Property Types

Home Dashboard > Property Types

search Scope User Search Clear

New

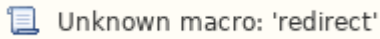
Property Name	Org.	Scope	Data Type	Description	Action
Email		User	String	Email address	 
Family Name		User	String	Surname or family name	 
Given Name		User	String	First or given name	 
Mobile		User	String	Mobile number	 

< > Export Data

The user profile may be customized, by an administrator, to add details that you may wish users to enter and maintain. This is done by creating a new property type having a property scope of *User*; refer to the [Property Types \(Manager v5.1\)](#) section for more information.

Administrators may also update the *Given Name*, *Family Name*, *Email* and *Mobile* details that are registered directly against a user account in Transact Manager. Please be aware that changes made to any of these details in a user account will not be automatically reflected in the corresponding fields against the default user profile. Remember user contact information is always sourced from the user's default user profile and not from the contact details as was first entered or updated directly against the user's account.

# Change User Profile for a User Account (Manager v5.1)







## Related Pages:

- [Assign Permissions to a Role \(Manager v17.10\)](#)
- [Assign Permissions to a Role \(Manager v5.1\)](#)
- [Assign Roles to User Account \(Manager v17.10\)](#)
- [Assign Roles to User Account \(Manager v5.1\)](#)
- [Bulk Import of User Accounts \(Manager v17.10\)](#)
- [Change a User Account \(Manager v17.10\)](#)
- [Change a User Account \(Manager v5.1\)](#)
- [Change a User's Group Membership \(Manager v17.10\)](#)
- [Change a User's Group Membership \(Manager v5.1\)](#)
- [Change User Profile for a User Account \(Manager v17.10\)](#)

## Change User Profile for a User Account

To maintain a user profile, an administrator will:




1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon () in the *Action* column or the link in the *Login Name* column).
3. Switch to the *User Profiles* tab.  
This will display a list of all the user profiles for this user account (see the screenshot below for an example) with the following columns:
  - *Profile Name*
  - *Profile Description*
  - *Current Profile* if ticked, is the default user profile used for prefilling.
  - *Action* from this page, for a specific user profile, you may perform the following actions:

Icon	Action
	View and/or change (same as clicking on the link in the <i>Profile Name</i> column)
	Delete (not recommended to delete a user profile, so take care where it is necessary to delete)
	To set this user profile as the default (for when there exists more than one user profile for a user account)

## Edit User Account - tbrown

[Home Dashboard](#) > [User Accounts](#) > [User Account](#)

User Organizations Spaces Roles Role Expiry Groups Group Expiry **User Profiles** Login History

Profile Name	Profile Description	Current Profile	Action
<a href="#">My Profile</a>	My default user profile	✓	  

[New](#) [Close](#)

# Create a New User Profile for a User Account (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

## Create a New User Profile for a User Account

To create a new user profile:

1. Click the *New* button. An *Edit User Profile* page is displayed.
2. As a minimum, you may simply enter a name for the *Profile Name* and click the *Save* button.

### Edit User Profile - Alternative Contact (tbrown)

Home Dashboard > User Accounts > User Account > User Profile

The User Profile has been successfully saved.

User Profile | User Properties

User: tbrown

Profile Name \* Alternative Contact

Profile Description

Current Flag









Save Close

3. Switch to the *User Properties* tab. The list of user properties for this user profile will be displayed, having blank in the *Value* column. The screenshot below shows an example of this.

### Edit User Profile - Alternative Contact (tbrown)


Home Dashboard > User Accounts > User Account > User Profile

User Profile | User Properties

Type	Value	Action
Email		 
Family Name		 
Given Name		 
Mobile		 

New Close

4. To set values for each of the user properties:

- a. Click on the *Edit* () icon and the *Edit User Property* page for the chosen user property will be displayed.
- b. As the example shown in the screenshot below, enter an appropriate value for the user property in the *Value* field.

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v2.macro.

MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

- c. Click the *Save* button if you wish to save any changes made, otherwise click the *Close* button.

### Edit User Property

Home Dashboard > User Accounts > User Account > User Profile > User Property

Profile: Alternative Contact

Type: Email

ID	Value
1	tbrown@outlook.com

Save Close

Generally, you should avoid deleting user properties as this will cause the user profile to be inconsistent with the other profiles (since it will be missing the property). If you want to unset a property, simply leave the value field blank.

For prefilling a form with the user's contact details sourced from a default user profile, you will need to map each data item (such as the *Given Name* and *Family Name*) to target locations in a form data configuration. More information on how to do this can be found in the [Property Prefill Mapping \(Manager v5.1\)](#) section.

# Login History (Manager v5.1)


Unknown macro: 'redirect'

## Related Pages:

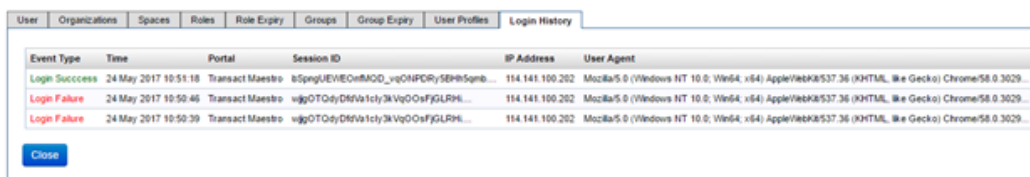
## Login History

The *Login History* tab displays a list of all attempts to log in by the user with this user account.

To view the login history for a user account:

1. Navigate to *Security* from the menu bar, and then click *User Accounts* from the dropdown menu.
2. Find and select the user account from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Login Name* column).
3. Switch to the *Login History* tab.  
The *Login History* tab gives you information on each login attempt with the following column details:

- **Event Type** The status of the login attempt such as *Login Success*, *Login Failure* and *Session Expiry*
- **Time** The date and time of the login attempt.
- **Portal** The space (portal) accessed (or attempted to access).
- **SessionID** These fields contain data related to the user and their environment, which can be helpful for debugging.
- **IPAddress** These fields contain data related to the user and their environment, which can be helpful for debugging.
- **UserAgent** These fields contain data related to the user and their environment, which can be helpful for debugging.



Event Type	Time	Portal	Session ID	IP Address	User Agent
Login Success	24 May 2017 10:51:18	Transact Maestro	85p9jUEHEnRAGD_vqCNPORy5EhR5gmb...	114.141.100.202	Mozilla/5.0 (Windows NT 10.0; Win64; x64; AppleWebK/537.36 (KHTML, like Gecko) Chrome/58.0.3029...
Login Failure	24 May 2017 10:50:46	Transact Maestro	vjgOT0dyDfNv1cty3KvqO0sFjGLRH...	114.141.100.202	Mozilla/5.0 (Windows NT 10.0; Win64; x64; AppleWebK/537.36 (KHTML, like Gecko) Chrome/58.0.3029...
Login Failure	24 May 2017 10:50:39	Transact Maestro	vjgOT0dyDfNv1cty3KvqO0sFjGLRH...	114.141.100.202	Mozilla/5.0 (Windows NT 10.0; Win64; x64; AppleWebK/537.36 (KHTML, like Gecko) Chrome/58.0.3029...

# Form Spaces (Manager v5.1)

Unknown macro: 'redirect'

## Overview

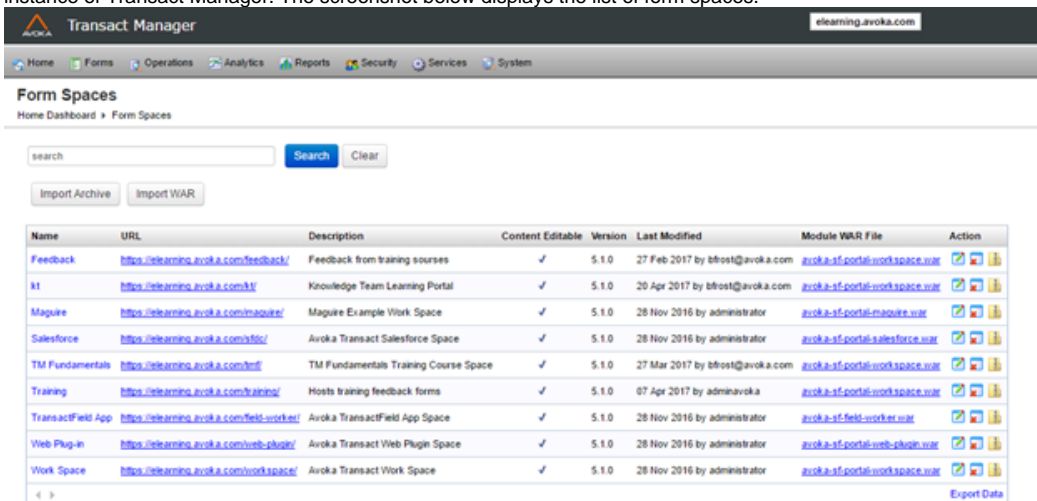
*Form Spaces* are a key part of Transact Manager and are used to host and expose forms to end users. Form spaces handle form requests, submissions and related form activities. While Transact Manager comes with a recommended form space (named Work Space) and an example self-service form space (named Maguire), form spaces are often customized. Every form in the Avoka Transact platform is associated with one or more form spaces. If a form is associated with multiple form spaces, the form (as well as any saved and completed submissions of that form) will generally be visible and available to all its associated form spaces.

## Browse the List of Form Spaces

Transact Manager allows all users to view the list of form spaces that are currently configured in their instance of Transact Manager. Browsing this list is the first step when deciding on the appropriate form spaces that a form should be associated with.

Follow the steps below to access and browse the list of form spaces currently configured in Transact Manager.

1. Select *Forms* from the menu bar. Selecting *Forms* will display the forms dropdown menu.
2. Select *Form Spaces* from the forms dropdown menu. Selecting this option will direct you to the list of form hosting spaces currently configured in your instance of Transact Manager. The screenshot below displays the list of form spaces.



You can filter this list by using a substring of the space name. This page also allows you to export the search results to Excel by clicking the *Export Data* link below the table (you may want to export this list as a record of the form spaces configured in your instance of Transact Manager).

Administrators can edit () or delete () existing spaces, as well as import or export space configurations from this page.

The *Module WAR File* column shows the file name of the deployed space's WAR file. Form Space WAR files can be downloaded by clicking the link in the *Module WAR File* column. You can also import an entire space WAR file by using the *Import WAR* button.

## Related Pages:

- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)
- [Configure Space Properties \(Manager v5.1\)](#)
- [Configure Space Resources \(Manager v17.10\)](#)
- [Configure Space Resources \(Manager v5.1\)](#)

# Edit a Form Space (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:


- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)
- [Configure Space Properties \(Manager v5.1\)](#)
- [Configure Space Resources \(Manager v17.10\)](#)
- [Configure Space Resources \(Manager v5.1\)](#)

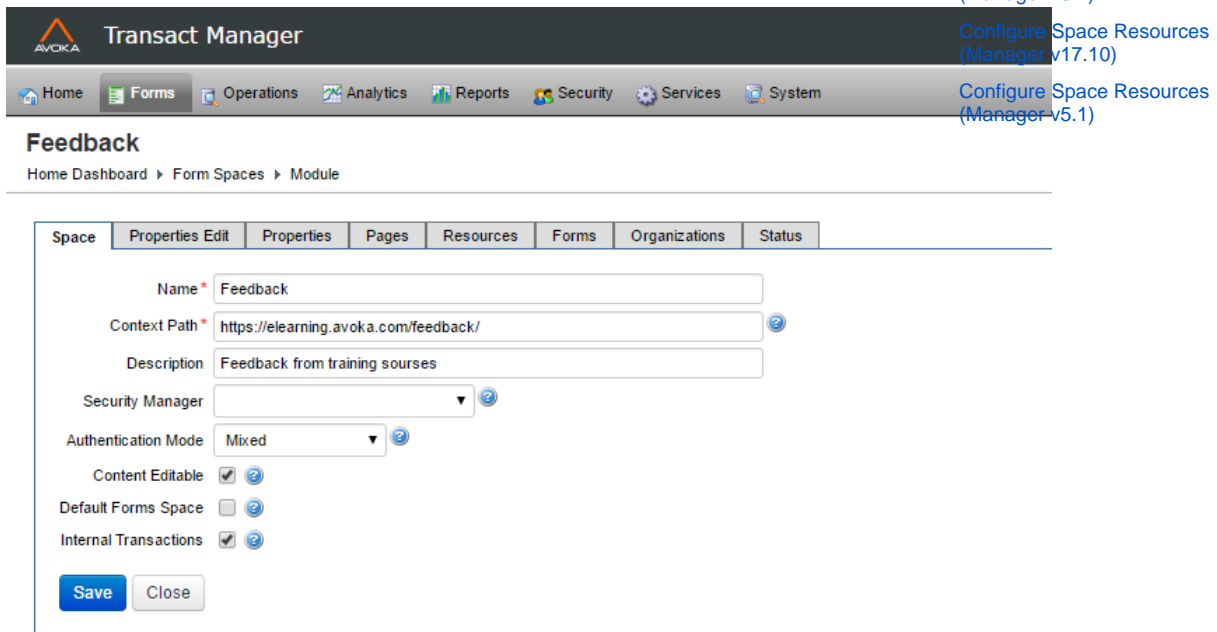
## Edit a Form Space

Transact Manager provides Administrators with the ability to edit an already configured form space. The list below identifies some of the ways that you may want to edit a form space.

- Update the name of the form space
- Select a new Security Manager for the form space
- Update/change the access to the form space (ie who can access the form space)
- Identify the selected form space as the default form space for all forms.

The steps below document the process of editing a Form Space.

1. Select *Forms > Form Spaces* from the menu bar.
2. Select the space that you want to edit and click the *Edit Space* icon (  ). Clicking this icon will display the *Edit Space* screen. The screenshot below displays the *Edit Space* screen.



The screenshot shows the Transact Manager interface. The top navigation bar includes Home, Forms, Operations, Analytics, Reports, Security, Services, and System. Below the navigation bar is a 'Feedback' section with a breadcrumb trail: Home Dashboard > Form Spaces > Module. The main content area displays the 'Edit Space' form for a space named 'Feedback'. The form includes the following fields and options:

- Name \***: Feedback
- Context Path \***: https://elearning.avoka.com/feedback/
- Description**: Feedback from training sources
- Security Manager**: (Dropdown menu)
- Authentication Mode**: Mixed
- Content Editable**:
- Default Forms Space**:
- Internal Transactions**:

At the bottom of the form are 'Save' and 'Close' buttons.

## Name

This editable text field displays the name of the form space. A form space's name is displayed to all logged in users when the space is being edited or viewed.

## Context Path

The context path of a form space is the prefix of a URL path that is used to select the context(s) to which an incoming request is passed through the form space. Typically, a context path URL in a Java servlet server (such as that backing Transact Manager) is of the format <http://hostname.com/contextPath/servletPath/pathInfo>. An example of a context path in Transact Manager is <https://elearning.avoka.com/feedback/>.

Be careful when editing the context path: When the Transact Manager server starts up, a context path will be created for each space that has been deployed. This is the case unless an entry with the same space name or context path already exists.

If needed, you can change the space context path to allow for Apache mappings etc. This should be the URL under which the space is accessible to users. Please note that the space context path is used during form submission - if the URL does not match the space context path (including the port), the submission will not be accepted.

## Description

This editable text field provides a brief description of the types of forms that should be hosted by the form space. This description is only seen when editing the form space.

## Security Manager

This dropdown menu allows you to select the form space's security manager. A security manager in Transact Manager contains the security configurations concerning user authentication, SSO timeout filters, and session timeouts.

## Authentication Mode

The authentication mode defines the level of authentication that is required to access the form space. The following are the three authentication modes that are available to all form spaces in Transact Manager.

- Mixed – This mode refers to both authenticated and anonymous users being able to access forms in the form space
- Authenticated Only – This mode refers to only authenticated users being able to access forms in the space. An authenticated user in Transact Manager is one that has entered a username and password that has been accepted by the system.
- Anonymous Only - This mode refers to only anonymous users being able to access forms in the space. An anonymous user is one that has not provided a username and/or password to access the form.



Forms configured with a different authentication mode to the authentication configured in the form space will be highlighted with a warning message.

## Content Editable checkbox

When the *Content Editable* checkbox is selected (ticked), administrators can adjust a space's content at runtime. If the space is editable (ie the *Content Editable* checkbox is selected), you will be able to edit all fields and space content. If the checkbox is not selected, several fields will be read-only, and space content cannot be changed. Changes made to the *Content Editable* checkbox will only be applied once the *Save* button has been clicked.

## Default Form Space

Select the *Default Forms Space* checkbox if the space you are currently editing should be used as the default space for rendering forms. This setting is mainly relevant when testing forms via the Transact Manager Management Console.

# Standard Space Properties (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)
- [Configure Space Properties \(Manager v5.1\)](#)
- [Configure Space Resources \(Manager v17.10\)](#)
- [Configure Space Resources \(Manager v5.1\)](#)

## Standard Space Properties - Properties Edit tab

Transact Manager comes with a set of standard space properties that can be applied to all spaces in an instance of Transact Manager. It is common for these standard properties to have a default value to avoid having to explicitly define these properties for all spaces.

The table below documents and describes the current list of key standard Form Space properties currently configured in Transact Manager.

Property	Default	Description
Account Locked Message	Depends on space	Message displayed at login to users whose accounts are locked.
Allow Form Cancel	true	Allows users to cancel a submission at the payment stage.
Allow Form Retry	true	Allows users to go back to the form and if payment has not been completed yet.
Allow XML Redirect Target	false	Allows XML form data to specify redirect target.
Allow XML Request Param Form Prefill	false	Allows XML request parameters [ xmlData   schemaSeed] to be used in Form Prefill
Anonymous Submission Access Timeout	15 min	The grace period in minutes during which anonymous users can access their submission. Note: Access is granted only if user's IP address has not changed.
CDN Server URL	-	Optional CDN Server URL for caching static content.
Email Form Receipt Subject	...	Email subject for form confirmation/receipt email
Email Form Receipt Message	...	Email message for form confirmation/receipt email
Email Lost Password Message	...	Lost password reset email message
Email Lost Password Subject	...	Lost password reset email subject
Email Saved Form Subject	...	Email subject for user saved form email
Email Saved Form Message	....	Email message for user saved form email
eSignature Enabled	false	Submission eSignature enabled
eSignature Confirm Alert	-	Submission eSignature page confirmation popup message

eSignature Cancel Alert	-	Submission eSignature page Cancel popup message
eSignature Enrollment Alert	-	Create Account page eSignature enrollment popup message
Form Terms And Conditions	-	The form Terms and Conditions statement the user must accept before accessing the form.
Google API Key	-	Google API Services Access Key
Server Busy Redirect URL	-	If set, this URL will be used to redirect space users to if they attempt to render a form, but the system cannot handle the request due to high load. By default, the "Server Busy" space page will be used.
Use Email for Login	false	Use the email address as the user login name for Local TM user accounts.



If you are using a customized Form Space, some of these properties may not be implemented.

# Configure Space Properties (Manager v5.1)

Unknown macro: 'redirect'


## Related Pages:

- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)

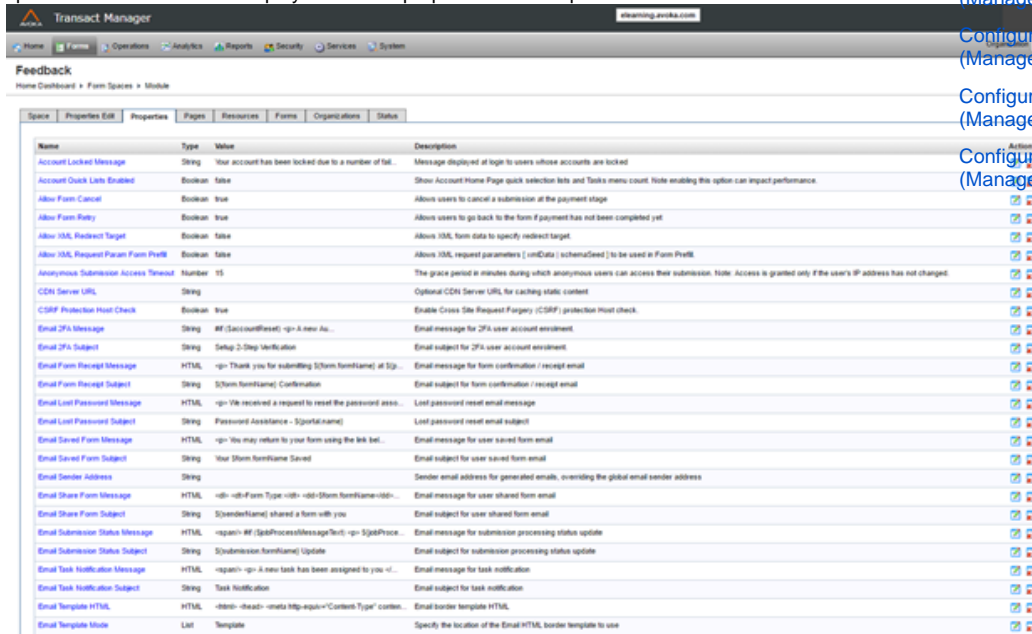
## Configure Space Properties - Properties tab












































Space properties are arbitrary named configuration values that are used to change or customize a form space. Transact Manager comes with several predefined space properties that each have their own unique functionality. Transact Manager allows administrators to create and add their own unique space properties.

The steps below document the process of viewing the list of currently configured properties of a space.

1. Select *Forms > Form Spaces* from the menu bar.
2. Select the space that you want to configure properties for and click the *Edit Space* icon  (ensure that the space is editable).
3. Switch to the *Properties* tab.

Switching to this tab will display the list of properties currently configured for the selected space. The screen below displays the list of properties for the space named *Feedback*.





Name	Type	Value	Description	Action
Account Locked Message	String	Your account has been locked due to a number of failed login attempts. Please contact an administrator to have your account reactivated.	Message displayed at login to users whose accounts are locked	 
Account Lock Leds Enabled	Boolean	false	Show Account Home Page quick selection lists and Tasks menu count. Note enabling this option can impact performance.	 
Allow Form Cancel	Boolean	true	Allows users to cancel a submission at the payment stage	 
Allow Form Retry	Boolean	true	Allows users to go back to the form if payment has not been completed yet	 
Allow XML Redirect Target	Boolean	false	Allows XML form data to specify redirect target	 
Allow XML Request Param Form Prefix	Boolean	false	Allows XML request parameters { uriData { schemaSeed } to be used in Form Prefix	 
Anonymous Submitter Access Timeout	Number	15	The grace period in minutes during which anonymous users can access their submission. Note: Access is granted only if the user's IP address has not changed	 
CDN Server URL	String		Optional CDN Server URL for caching static content	 
CSRF Protection Host Check	Boolean	true	Enable Cross Site Request Forgery (CSRF) protection host check	 
Email 2FA Message	String	Hi {AccountName}! -> A new Au...	Email message for 2FA user account enrollment	 
Email 2FA Subject	String	Setup 2-Step Verification	Email subject for 2FA user account enrollment	 
Email Form Receipt Message	HTML	-> Thank you for submitting {form formName} at {ip...}	Email message for form confirmation / receipt email	 
Email Form Receipt Subject	String	{form formName} Confirmation	Email subject for form confirmation / receipt email	 
Email Lost Password Message	HTML	-> We received a request to reset the password pass...	Lost password reset email message	 
Email Lost Password Subject	String	Password Assistance - {orgName}	Lost password reset email subject	 
Email Saved Form Message	HTML	-> You may return to your form using the link bel...	Email message for user saved form email	 
Email Saved Form Subject	String	Your {form formName} Saved	Email subject for user saved form email	 
Email Sender Address	String		Sender email address for generated emails, overriding the global sender address	 
Email Share Form Message	HTML	-> {form Form Type} -> {form formName} -> {form...}	Email message for user shared form email	 
Email Share Form Subject	String	{senderName} shared a form with you	Email subject for user shared form email	 
Email Submission Status Message	HTML	-> {form {SpdProcessMessageText} -> {SpdProce...	Email message for submission processing status update	 
Email Submission Status Subject	String	{submission formName} Update	Email subject for submission processing status update	
Email Task Notification Message	HTML	-> {form -> A new task has been assigned to you v...	Email message for task notification	
Email Task Notification Subject	String	Task Notification	Email subject for task notification	
Email Template HTML	HTML	-> {form -> {meta http-equiv="Content-Type" conten...	Email border template HTML	
Email Template Mode	List	Template	Specify the location of the Email HTML border template to use	

[Configure Space Properties \(Manager v5.1\)](#)


[Configure Space Resources \(Manager v17.10\)](#)

[Configure Space Resources \(Manager v5.1\)](#)

- Select the  icon to edit the selected property.
- Select the  icon to delete the selected property.

## Edit Space Properties

The steps below document the process of editing a space property.

1. Select *Forms > Form Spaces* from the menu bar.
2. Select the space that you want to edit properties for and click the *Edit Space* icon (ensure that the space is editable).
3. Switch to the *Properties* tab.
4. Select the property that you want to edit and click the edit icon ().

Clicking this icon will direct you to the *Portal Property* page. The screen below displays this page.

### Edit Portal Property - Account Locked Message (Gov Assist)

Home > Portals > Portal > Portal Property



Name\* Account Locked Message

Your account has been locked due to a number of failed login attempts. Please contact an administrator to have your account reactivated.

Value

Save Close

5. Make your edits to the Value of the property (only the value of the property can be edited).

6. Click *Save*.  
Your changes will only be applied once you click the *Save* button.

# Email Templates (Manager v5.1)

Unknown macro: 'redirect'

## Email Templates

Email Templates are properties that are used to insert dynamic content into an email. In Transact Manager, Email Templates are used in many of the emails that are sent to Transact Manager end users and administrators. Email Templates in Transact Manager can be customized to override the templates at a Form or Organization level.

Email Templates in Transact Manager are created using Velocity Style markup, in particular, the Velocity Template Language (VTL). VTL is one of the simplest and easiest methods of incorporating dynamic data into a form and is made up of References and Directives. References begin with a \$ character and are used to get something (eg \$a = FirstName), and Directives begin with a # character and are used to do something (eg # get, # set, # end).

In Transact Manager, Email Templates are created and configured in the Properties tab of the Form Space in which they are associated with. A common example of an Email Template is an 'Email Task Notification Message' property. The screenshot below displays the configuration of this Email Template.

Property Type: Email Task Notification Message

Value:

```
1 <span/>
2 <p> A new task has been assigned to you </p>
3 <p> ${submission.taskMessage} </p>
4 <p> #if (${taskUrl})Please complete the task <a href=${taskUrl}>here</a> #end </p>
5 <!-- ${environmentName} -->
```

Save Close

This Email Template displays text in an email that notifies the recipient that there is a task ready for them to complete. The Email Template begins with a line of regular text, "A new task has been assigned to you", and then dynamically inserts the task that is available for the recipient to complete. The Email Template achieves this dynamic insertion of data by using the reference \$taskUrl. When an email is sent that uses this Email Template, the \$taskURL reference is replaced by the URL link that will direct the recipient to the task that is ready for them to complete.

# Configure Pages for a Space (Manager v5.1)


Unknown macro: 'redirect'

## Related Pages:

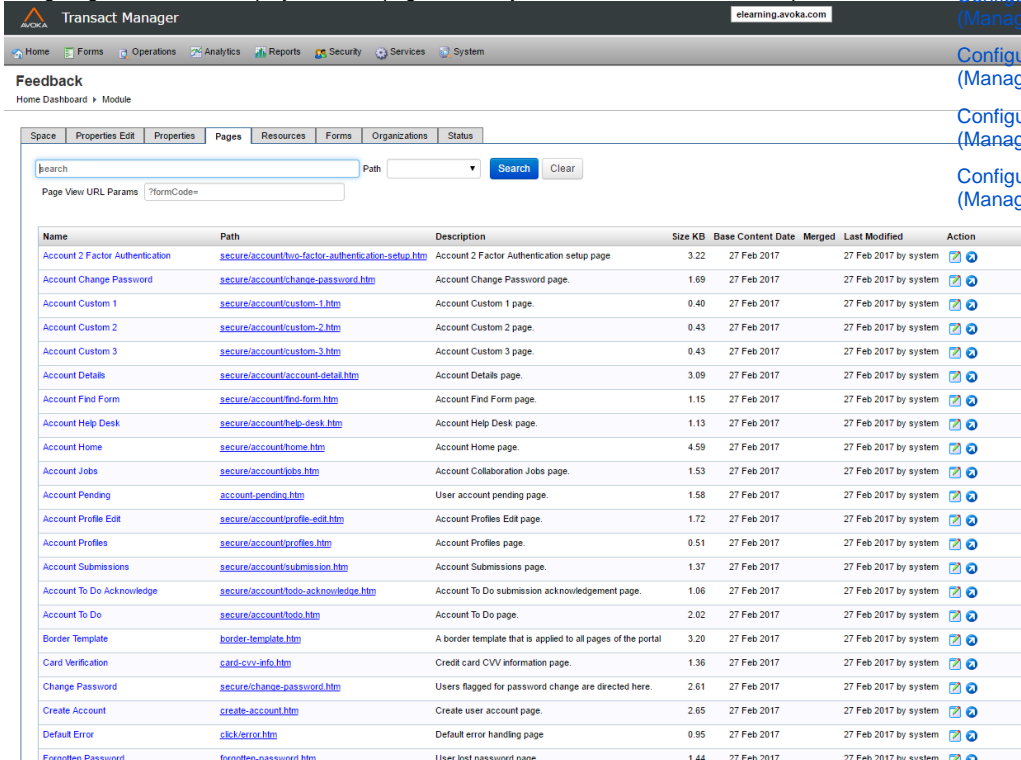
- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)

## Configure Pages for a Space

Transact Manager provides several 'generic' HTML pages that are used to surround all forms associated with a form space. These pages are not a part of the form, but rather are a part of the entire application that presents the form. Common examples of space pages include a 'Forgotten Password' page, a 'Form Not Found' page, and a 'Terms and Conditions' page. To configure space pages, it is essential that the *Content Editable* checkbox is selected (ticked). The steps below document the process of configuring space pages.

1. Select *Forms > Form Spaces* from the menu bar.
2. Select the space that you want to edit and click the *Edit Space icon* .
3. Navigate to the *Pages* tab.

Navigating to this tab will display the list of pages currently associated with the selected space.




Name	Path	Description	Size KB	Base Content Date	Merged	Last Modified	Action
Account 2 Factor Authentication	<a href="#">secure/account/two-factor-authentication-setup.htm</a>	Account 2 Factor Authentication setup page	3.22	27 Feb 2017		27 Feb 2017 by system	
Account Change Password	<a href="#">secure/account/change-password.htm</a>	Account Change Password page.	1.69	27 Feb 2017		27 Feb 2017 by system	
Account Custom 1	<a href="#">secure/account/custom-1.htm</a>	Account Custom 1 page.	0.40	27 Feb 2017		27 Feb 2017 by system	
Account Custom 2	<a href="#">secure/account/custom-2.htm</a>	Account Custom 2 page.	0.43	27 Feb 2017		27 Feb 2017 by system	
Account Custom 3	<a href="#">secure/account/custom-3.htm</a>	Account Custom 3 page.	0.43	27 Feb 2017		27 Feb 2017 by system	
Account Details	<a href="#">secure/account/account-detail.htm</a>	Account Details page.	3.09	27 Feb 2017		27 Feb 2017 by system	
Account Find Form	<a href="#">secure/account/find-form.htm</a>	Account Find Form page.	1.15	27 Feb 2017		27 Feb 2017 by system	
Account Help Desk	<a href="#">secure/account/help-desk.htm</a>	Account Help Desk page.	1.13	27 Feb 2017		27 Feb 2017 by system	
Account Home	<a href="#">secure/account/home.htm</a>	Account Home page.	4.59	27 Feb 2017		27 Feb 2017 by system	
Account Jobs	<a href="#">secure/account/jobs.htm</a>	Account Collaboration Jobs page.	1.53	27 Feb 2017		27 Feb 2017 by system	
Account Pending	<a href="#">account/pending.htm</a>	User account pending page.	1.58	27 Feb 2017		27 Feb 2017 by system	
Account Profile Edit	<a href="#">secure/account/profile-edit.htm</a>	Account Profiles Edit page.	1.72	27 Feb 2017		27 Feb 2017 by system	
Account Profiles	<a href="#">secure/account/profiles.htm</a>	Account Profiles page.	0.51	27 Feb 2017		27 Feb 2017 by system	
Account Submissions	<a href="#">secure/account/submission.htm</a>	Account Submissions page.	1.37	27 Feb 2017		27 Feb 2017 by system	
Account To Do Acknowledge	<a href="#">secure/account/todo-acknowledge.htm</a>	Account To Do submission acknowledgement page.	1.06	27 Feb 2017		27 Feb 2017 by system	
Account To Do	<a href="#">secure/account/todo.htm</a>	Account To Do page.	2.02	27 Feb 2017		27 Feb 2017 by system	
Border Template	<a href="#">border-template.htm</a>	A border template that is applied to all pages of the portal	3.20	27 Feb 2017		27 Feb 2017 by system	
Card Verification	<a href="#">card-cvv-info.htm</a>	Credit card CVV information page.	1.36	27 Feb 2017		27 Feb 2017 by system	
Change Password	<a href="#">secure/change-password.htm</a>	Users flagged for password change are directed here.	2.61	27 Feb 2017		27 Feb 2017 by system	
Create Account	<a href="#">create-account.htm</a>	Create user account page.	2.65	27 Feb 2017		27 Feb 2017 by system	
Default Error	<a href="#">click/error.htm</a>	Default error handling page	0.95	27 Feb 2017		27 Feb 2017 by system	
Forgotten Password	<a href="#">forgotten-password.htm</a>	User lost password page	1.44	27 Feb 2017		27 Feb 2017 by system	

[Configure Space Properties \(Manager v5.1\)](#)

[Configure Space Resources \(Manager v17.10\)](#)





[Configure Space Resources \(Manager v5.1\)](#)

 You can filter this list to only display pages containing a certain string by entering the string into the *search* textbox and clicking *Search*.

## Last Modified

The *Last Modified* column tells you if a page has been recently edited/modified. If the page has been modified, the last modified date and the name of the user who modified the page will be displayed. If the page's content is different (ie the page has been modified/edited) to its base content (the page's content as defined in the space's WAR file), the entry is highlighted in red, and additional actions (to view the differences between the current and base content and to restore the base content) are made available. The screenshot below displays pages that contain current content that is different from their base content.

Submission Confirmation Secure	<a href="#">secure/confirmation.htm</a>	Secure form submission confirmation page.	10.50	18 Apr 2017	27 Feb 2017 by system	
Submission Confirmation	<a href="#">confirmation.htm</a>	Form submission confirmation page.	10.50	18 Apr 2017	27 Feb 2017 by system	

- Select the  icon to restore the content back to the original base content. In other words, this button will remove all modifications made and will return the content back to its original form.
- Select the  icon to compare the current modified version of the page with the base version of the page.
- Select the  icon to promote the modified page to the base page. In other words, select this icon to make the modified page the new generic (base) version of the page. A base page is the generic/original version of a page. This icon is known as the *Mark Content Merged* icon.
- Select the  icon to view the page. If the page needs certain URL parameters to display correctly (for example, a form code), enter the parameter(s) into the *Page View URL Params* field first. The screenshot below highlights this field.

Only administrators have access to all these action icons. Many users will only be presented with the edit and view icons.

The screenshot shows the Transact Manager interface. At the top, there is a navigation bar with the logo and the text 'Transact Manager' and 'elearning.avoka.com'. Below this is a menu with options: Home, Forms, Operations, Analytics, Reports, Security, Services, and System. The main content area is titled 'Feedback' and 'Home Dashboard > Module'. There are tabs for 'Space', 'Properties Edit', 'Properties', 'Pages', 'Resources', 'Forms', 'Organizations', and 'Status'. A search bar is present with a 'Search' button and a 'Clear' button. Below the search bar, a red box highlights the 'Page View URL Params' field, which contains the text '?formCode='. Below this is a table with columns: Name, Path, Description, Size KB, Base Content Date, Merged, Last Modified, and Action. The table lists various pages such as 'Account 2 Factor Authentication', 'Account Change Password', 'Account Custom 1', etc.

Name	Path	Description	Size KB	Base Content Date	Merged	Last Modified	Action
Account 2 Factor Authentication	<a href="#">secure/account/hvo-factor-authentication-setup.htm</a>	Account 2 Factor Authentication setup page	3.22	27 Feb 2017		27 Feb 2017 by system	
Account Change Password	<a href="#">secure/account/change-password.htm</a>	Account Change Password page.	1.69	27 Feb 2017		27 Feb 2017 by system	
Account Custom 1	<a href="#">secure/account/custom-1.htm</a>	Account Custom 1 page.	0.40	27 Feb 2017		27 Feb 2017 by system	
Account Custom 2	<a href="#">secure/account/custom-2.htm</a>	Account Custom 2 page.	0.43	27 Feb 2017		27 Feb 2017 by system	
Account Custom 3	<a href="#">secure/account/custom-3.htm</a>	Account Custom 3 page.	0.43	27 Feb 2017		27 Feb 2017 by system	
Account Details	<a href="#">secure/account/account-detail.htm</a>	Account Details page.	3.09	27 Feb 2017		27 Feb 2017 by system	
Account Find Form	<a href="#">secure/account/find-form.htm</a>	Account Find Form page.	1.15	27 Feb 2017		27 Feb 2017 by system	
Account Help Desk	<a href="#">secure/account/help-desk.htm</a>	Account Help Desk page.	1.13	27 Feb 2017		27 Feb 2017 by system	
Account Home	<a href="#">secure/account/home.htm</a>	Account Home page.	4.59	27 Feb 2017		27 Feb 2017 by system	
Account Jobs	<a href="#">secure/account/jobs.htm</a>	Account Collaboration Jobs page.	1.53	27 Feb 2017		27 Feb 2017 by system	
Account Pending	<a href="#">account-pending.htm</a>	User account pending page.	1.58	27 Feb 2017		27 Feb 2017 by system	
Account Profile Edit	<a href="#">secure/account/profile-edit.htm</a>	Account Profiles Edit page.	1.72	27 Feb 2017		27 Feb 2017 by system	
Account Profiles	<a href="#">secure/account/profiles.htm</a>	Account Profiles page.	0.51	27 Feb 2017		27 Feb 2017 by system	
Account Submissions	<a href="#">secure/account/submission.htm</a>	Account Submissions page.	1.37	27 Feb 2017		27 Feb 2017 by system	
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Card Verification	<a href="#">card-cvv-info.htm</a>	Credit card CVV information page.	1.36	27 Feb 2017		27 Feb 2017 by system	
Change Password	<a href="#">secure/change-password.htm</a>	Users flagged for password change are directed here.	2.61	27 Feb 2017		27 Feb 2017 by system	
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Default Error	<a href="#">click/error.htm</a>	Default error handling page	0.95	27 Feb 2017		27 Feb 2017 by system	
Forgotten Password	<a href="#">forgotten-password.htm</a>	User lost password page	1.44	27 Feb 2017		27 Feb 2017 by system	

## Edit Space Pages

Though space pages are generic, you are still able to customize them to better suit your individual needs. However, only the HTML elements of space pages can be edited. In other words, the way that space pages act and respond cannot be edited.

Follow the steps below to edit space pages.

1. Select *Forms > Form Spaces* from the menu bar.
2. Select the space that you want to edit and click the *Edit Space icon* ( ).
3. Navigate to the *Pages* tab.
4. Navigate to the page that you want to edit and click the from the Actions column of the table that displays the list of pages.  
Clicking this icon will direct you to the *Portal Page*. This page allows you to modify the HTML space pages.

Transact Manager elearning.avoka.com

Home Forms Operations Analytics Reports Security Services System

### Feedback - Account 2 Factor Authentication

Home Dashboard > Portal Page

Portal Page Page History

Page Content

```

1 <!-- account-detail.htm-->
2 <div class="row" id="twoFactorAuthenticationSignup">
3 <!-- Heading -->
4 <div class="span12 topSpace divider">
5 <h1>Setup 2 Step Verification</h1>
6 <p>
7 2-Step Verification adds an extra layer of security to your Account, drastically reducing the chances of having the personal
8 information in your account stolen. To break into an account with 2-Step Verification, bad guys would not only have to know your username
9 and passwords, they'd also have to get a hold of your phone.
10 </p>
11 </div>
12 <div class="clear-both">
13 <div class="row"><hr></div>
14 </div>
15
16 <!-- Error banner -->
17 <div class="row">
18 <div class="span12">
19 #set ($flash = "")
20 #set ($flash = $session.flashMsg)
21 #if ($flash != "")
22 <div class="alert alert-success">
23 <div class="row">
24 <span class="span12"><i class="icon-success"></i><span class="alert-text"><b>Account details changed</b></span>
25 <span class="span12">
26 <p>$flash</p>
27 </span>
28 </div>
29 </div>
30 #end
31 #if ($errorMsg && $errorMsg != "")
32 <div class="alert">
33 <div class="row">
34 <span class="span12"><i class="icon-alert"></i><span class="alert-text"><b>Error</b></span></span>
35 <span class="span12">
36 <p>$errorMsg</p>
37 </span>
38 </div>
39 </div>
40 #else
41 #if ($emailed)
42 <div class="alert alert-success">
43 <div class="row">
44 <span class="span8"><i class="icon-success"></i><span class="alert-text bold">Thank You</span></span>
45 <span class="span8">
46 <p>An email containing further instructions has been sent to you.</p>
47 </span>
48 </div>
49 #end
50 #end
51 </div>
52 </div>
53 </div>
54
55 #if ($supportTwoFactorAuthentication)
56 #if ($detailForm)
57 <div class="alert alert-success">
58 <div class="row">
59 <span class="span8"><i class="icon-success"></i><span class="alert-text bold">2 Step Verification</span></span>
60 <span class="span8">
61 <p>
62 To enrol for 2 Step Verification, you will need to set up additional account information.<br>
63 Please use the button below to send yourself an enrolment email. Follow the instructions in the email to enable 2 Step Verification.
64 </p>
65 <p>

```

5. Make the edits to the page
6. Click Save

If you would like to restore the base content of the space page, click *Restore*

### Page History

Navigating to the *Page History* tab allows you to view the history of the page. A new 'version' of the page is created each time the page is edited. The screenshot below displays the history of the *Account 2 Factor Authentication* page.

Transact Manager Organization

Home Forms Operations Analytics Reports Security Services System

### Feedback - Account 2 Factor Authentication

Home Dashboard > Form Spaces > Module > Portal Page

Portal Page Page History

Version	Value	Created At	Created By	Action
1	<!-- account-detail.htm--> <div class="row" id="twoFactorAuthenticationSignup"> <!-- Heading - ...	01 May 2017 14:57:10 PM		
2	<!-- account-detail.htm--> <div class="row" id="twoFactorAuthenticationSignup"> <!-- Heading - ...	01 Jun 2017 11:38:40 AM		
3	<!-- account-detail.htm--> <div class="row" id="twoFactorAuthenticationSignup"> <!-- Heading - ...	01 Jun 2017 11:39:47 AM		

Selecting the icon will restore the selected version's content and apply it as the Base Page Content.

# Configure Space Resources (Manager v5.1)


Unknown macro: 'redirect'

## Related Pages:

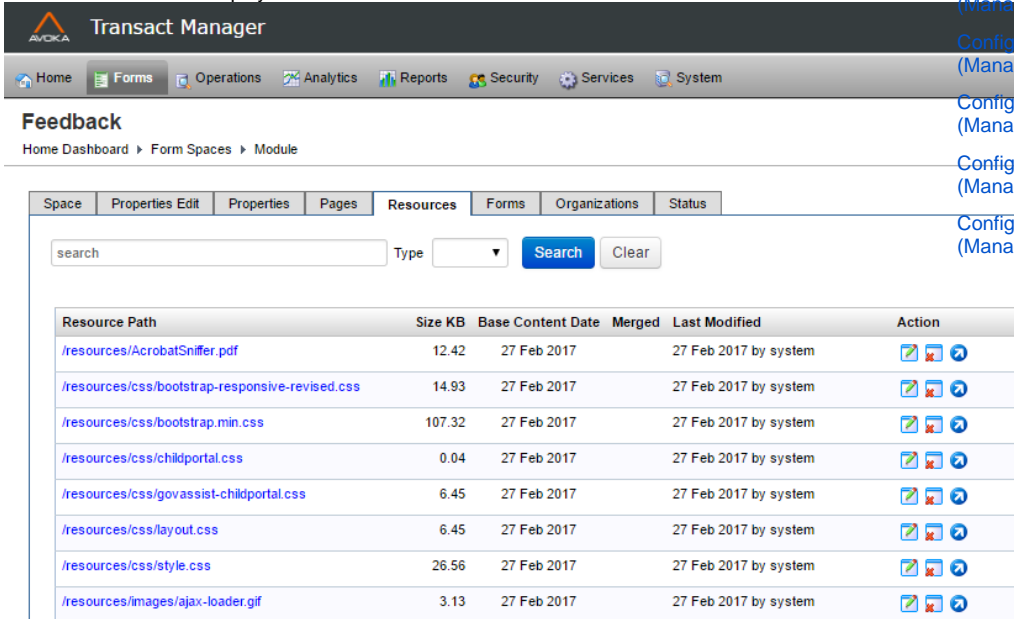
- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)
- [Configure Space Properties \(Manager v5.1\)](#)
- [Configure Space Resources \(Manager v17.10\)](#)
- [Configure Space Resources \(Manager v5.1\)](#)

























## Configure Space Resources

Space resources are files other than HTML files (pages) that much like spaces pages, surround a form. Common examples of space resources include CSS files, and images. The steps below document the process of viewing the list of space resources for a selected space.



1. *Select Forms > Form Spaces from the menu bar.*
2. Select the space that you want to edit and click the *Edit Space icon* (.
3. Switch to the *Resources* tab.

Switching to this tab will display the list of resources currently configured for the selected space. The screenshot below displays the list of resources.



Resource Path	Size KB	Base Content Date	Merged	Last Modified	Action
<a href="#">/resources/AcrobatSniffer.pdf</a>	12.42	27 Feb 2017		27 Feb 2017 by system	  
<a href="#">/resources/css/bootstrap-responsive-revised.css</a>	14.93	27 Feb 2017		27 Feb 2017 by system	  
<a href="#">/resources/css/bootstrap.min.css</a>	107.32	27 Feb 2017		27 Feb 2017 by system	  
<a href="#">/resources/css/childportal.css</a>	0.04	27 Feb 2017		27 Feb 2017 by system	  
<a href="#">/resources/css/govassist-childportal.css</a>	6.45	27 Feb 2017		27 Feb 2017 by system	  
<a href="#">/resources/css/layout.css</a>	6.45	27 Feb 2017		27 Feb 2017 by system	  
<a href="#">/resources/css/style.css</a>	26.56	27 Feb 2017		27 Feb 2017 by system	  
<a href="#">/resources/images/ajax-loader.gif</a>	3.13	27 Feb 2017		27 Feb 2017 by system	  

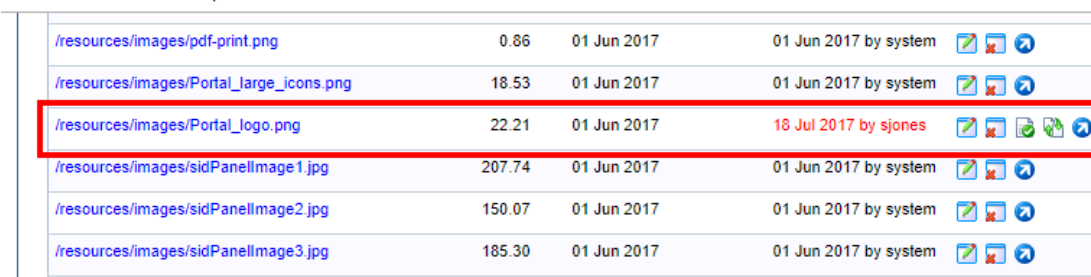
You can filter this list to only show resources whose content includes a certain string by entering the string into the search box and clicking *Search*. You can also filter by resource type.










- Select the  icon to view the content of the resource.
- Select the  icon to edit the contents of the resource.




The *Last Modified* column shows when a resource was last modified. If the resource has been modified, the date that the resource was modified and the name of the user who modified the resource are shown. If the content is different to the base content (the resource's content as defined in the space's WAR file), the entry is highlighted in red, and additional actions (to view the differences between the current and base content of the resource and to restore the base content of the resource) are made available. The screenshot below highlights a resource that contains current content that is different to its original base content.

## Maguire

Home Dashboard > Form Spaces > Module



<a href="#">/resources/images/pdf-print.png</a>	0.86	01 Jun 2017		01 Jun 2017 by system	  
<a href="#">/resources/images/Portal_large_icons.png</a>	18.53	01 Jun 2017		01 Jun 2017 by system	  
<a href="#">/resources/images/Portal_logo.png</a>	22.21	01 Jun 2017		18 Jul 2017 by sjones	    
<a href="#">/resources/images/sidPanelImage1.jpg</a>	207.74	01 Jun 2017		01 Jun 2017 by system	  
<a href="#">/resources/images/sidPanelImage2.jpg</a>	150.07	01 Jun 2017		01 Jun 2017 by system	  
<a href="#">/resources/images/sidPanelImage3.jpg</a>	185.30	01 Jun 2017		01 Jun 2017 by system	  

- Select the  icon to restore the resource's content back to the original base content. In other words, this button will remove all modifications made and return the resource's content back to its base.
- Select the  icon to promote the modified resource to the base resource. In other words, select this icon to make the modified page the new generic (base) version of the resource.
- Select the  icon to view the resource.

## Create Space Resources

Transact Manager allows Administrators to create their own unique resources for a specified form space. The steps below document the process of creating new space resources.

1. Select *Forms > Form Spaces from the menu bar.*
2. Select the space that you want to create a resource for and click the *Edit Space icon* (ensure that the space is editable).
3. Switch to the *Resources* tab.  
Switching to this tab will display the list of resources currently configured for the selected space.
4. Navigate down the page and click the *New* button.  
Clicking this button will direct you to the *Edit Portal Resource* page. The screen below highlights the *New* button.

/resources/js/jquery.payment.js	12.92	27 Feb 2017	27 Feb 2017 by system	  
/resources/js/pdfobject_1.2.js	4.53	27 Feb 2017	27 Feb 2017 by system	  
/resources/js/readerSniff.js	7.51	27 Feb 2017	27 Feb 2017 by system	  
/resources/js/respond.min.js	3.98	27 Feb 2017	27 Feb 2017 by system	  
/resources/js/searchTable.js	2.84	27 Feb 2017	27 Feb 2017 by system	  
/resources/js/xfsv2.js	0.17	27 Feb 2017	27 Feb 2017 by system	  

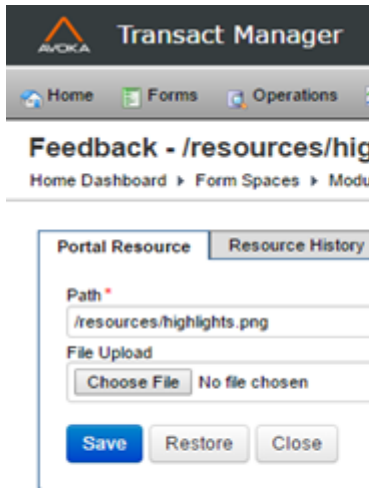
New
Restore Base Content
Close

5. Enter a path for the resource into the *Path* field.  
The *Path* is where the resource should be hosted (relative to the space context path). An example *Path* is *resources/CSS/learning.css* or *resources/highlights.png*
6. Enter content for the path.  
For a CSS resource or any other textual resources (for example a Word document), you can add content directly into the content text area. For resources that require attachments, such as images, attach the file using the *File Upload* functionality.
7. Click the *Save* button.  
Once you have provided a *Path* and added content to the resource, the resource will only be created and added to the resource list once the *Save* button has been clicked.

## Edit Space Resources

There may be occasions where you may want to change or update a resource. These changes or updates may be as simple as changing an image that is displayed on the 'Forgotten Password' space page. The steps below identify and describe the process of editing a space resource.

1. Select *Forms > Form Spaces from the menu bar.*
2. Select the space that hosts the resource that you want to edit and click the *Edit Space icon* (ensure that the space is editable).
3. Switch to the *Resources* tab.  
Switching to this tab will display the list of resources currently configured for the selected space.
4. Select the resource that you want to edit and click the *Edit Resource icon*.  
Clicking this icon will direct you to the *Edit Space Resource* page. The screenshots below demonstrate the *Edit Space Resource* pages for a CSS resource and an image resource.

CSS Resource	Image Resource
	

**Transact Manager**

Home Forms Operations Analytics Reports Security Services System

## Feedback - /resources/css/bootstrap-responsive-revised.css

Home Dashboard > Form Spaces > Module > Portal Resource

Portal Resource Resource History

Path\*  
/resources/css/bootstrap-responsive-revised.css

Content

```

1  /*!
2  * Bootstrap Responsive v2.2.1
3  *
4  * Copyright 2012 Twitter, Inc
5  * Licensed under the Apache License v2.0
6  * http://www.apache.org/licenses/LICENSE-2.0
7  *
8  * Designed and built with all the love in the world @twitter by @mdo and @fat.
9  */
10
11 /*
12 * mmina@avoka.com
13 * - removed negative margin on row
14 * - increased container width from 1170px to 1200px
15 * - increased container width from 724px to 764px
16 * - increased span margin-left from 20px to 30px
17 * - removed body padding
18 * - added span padding for max-width: 768
19 * - media query changed from 979px to 1000px
20 * - media query changed from 769px to 790px
21 * - removed media query min-width: 1200px
22 * - decrease all spans and contained elements by 10px
23 */
24
25 .clearfix {
26   *zoom: 1;
27 }
28
29 .clearfix:before,
30 .clearfix:after {
31   display: table;
32   line-height: 0;
33   content: "";
34 }
35
36 .clearfix:after {
37   clear: both;
38 }
39
40 .hide-text {
41   font: 0/0 a;
42   color: transparent;
43   text-shadow: none;
44   background-color: transparent;
45   border: 0;
46 }
47
48 .input-block-level {
49   display: block;
50   width: 100%;
51   min-height: 30px;
52   -webkit-box-sizing: border-box;
53   -moz-box-sizing: border-box;
54   box-sizing: border-box;
55 }
56
57 .hidden {
58   display: none;
59   visibility: hidden;
60 }
61
62 .visible-phone {

```

5. Make your edits.  
For a CSS file, you can make your edits directly into the Content area. For an image resource, you can upload a new (updated) PNG or jpeg file.
6. Click Save  
Any updates that you make will only be applied once you click the *Save* button.







Clicking the *Restore* button will restore the base content of the space resource.

## View the History of the Resource



To view the history of a space resource, switch to the Resource History tab. The Resource History tab will display every edit that has ever been made to the selected resource. For every edit that is made to the resource, a new 'version' of the resource is created. The screenshot below displays the history of a resource.

1. Make your edits.  
For a CSS file, you can make your edits directly into the Content area. For an image resource, you can upload a new (updated) PNG or jpeg file.
2. Click *Save*.  
Any updates that you make will only be applied once you click the *Save* button.

Portal Resource | Resource History

Version	Value	Created At	Created By	Action
1	<!-- Ck:headerMenu --> #parse(\$subHeaderPath) #parse(\$optionalHeaderPath) <!-- Ck:page...	07 Apr 2014 10:54:49 AM	lpammer	  
2	<!-- Ck:headerMenu --> #parse(\$subHeaderPath) <!-- Ck:pageContent --> #parse(\$path)	07 Apr 2014 10:54:55 AM	lpammer	

[Close](#)

- Selecting the  icon will restore the resource to a previous version.
- Selecting the  icon compares the content of a previous version of the resource with the current version of the resource.

# Associate Organizations with a Space (Manager v5.1)

Unknown macro: 'redirect'


Related Pages:

## Page Contents:

- [Overview](#)
- [View Organizations associated with a Space](#)
- [Assign Organizations to a Space](#)
- [View Spaces associated with an Organization](#)
- [Assign Spaces to an Organization](#)

## Overview

All forms that are to be accessed by end users need to be associated with at least one form space. The form spaces available to the form are determined by the spaces associated with the form's Organization.

 The Web Plug-In space is the default space used when building TM form versions from Maestro. The Web Plug-In space is **required** for all users and organizations working with Maestro forms, otherwise you will receive an error message when building the TM form version. Please see [Web Plug-In Space \(Manager v5.1\)](#) for more information.

**This may require changes to your currently configured system when using beginning to use Maestro 5.1 (or later).**


Error rendering macro  
'contentbylabel'

com.atlassian.renderer.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

There are two ways to associate Spaces with Organizations. You can do so from the Space Dashboard, or from the Organization Dashboard.

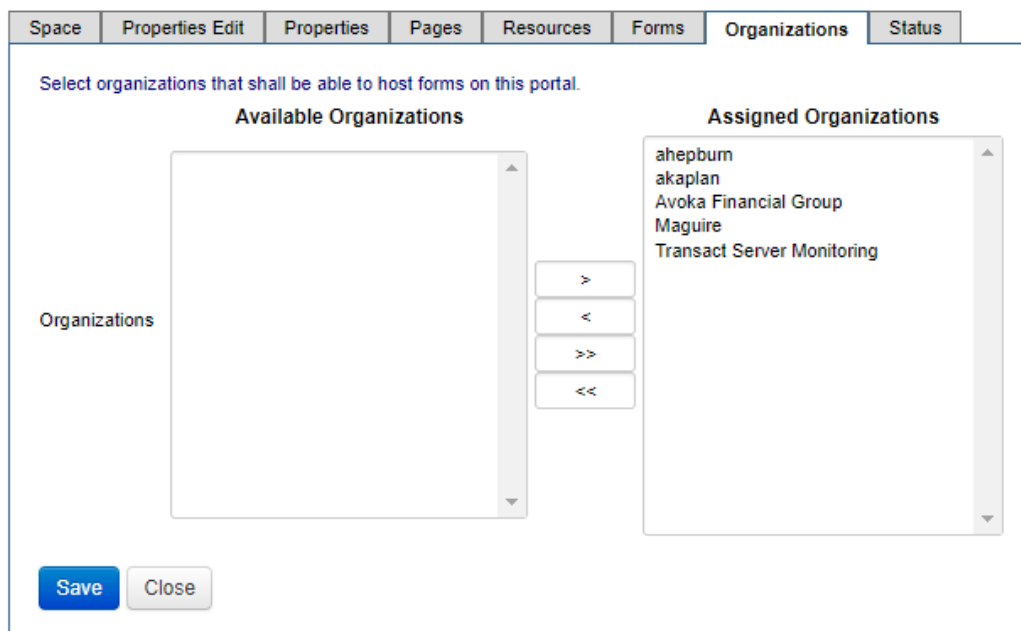
## View Organizations associated with a Space

The steps below document the process of viewing the list of Organizations that are currently assigned to a selected form space.

1. *Select Forms > Form Spaces* from the menu bar.
2. Select the space that you want to view currently assigned Organizations for, and click the *Edit Space* icon  (ensure that the space is editable).
3. Switch to the *Organizations* tab.  
Switching to this tab will direct you to the *Organization Selection* page. The *Organization Selection* page displays two lists, the first list identifies each of the Organizations that are available to be assigned to the form space, and the second list identifies the Organizations currently assigned to the selected form space. The screen below displays the *Organization Selection* screen.

### Web Plug-in

Home Dashboard ▶ Form Spaces ▶ Module



Space Properties Edit Properties Pages Resources Forms **Organizations** Status

Select organizations that shall be able to host forms on this portal.

**Available Organizations**

Organizations

**Assigned Organizations**

ahepbun  
akaplan  
Avoka Financial Group  
Maguire  
Transact Server Monitoring

>  
<  
>>  
<<

Save Close

## Assign Organizations to a Space

Follow the steps below to assign Organizations to a selected form space.

1. Select the Organization that you want to assign to a selected form space (from the *Organization Selection* screen).
2. Click the ">" icon to move the selected form space from the *Available Organizations* list to the *Assigned Organizations* list.
3. Click the *Save* button


Selecting the "<" icon will move the selected Organization from the *Assigned Organizations* list, to the *Available Organizations* list.

Selecting the ">>" icon will move all Organizations from the *Available Organizations* list, to the *Assigned Organizations* list.

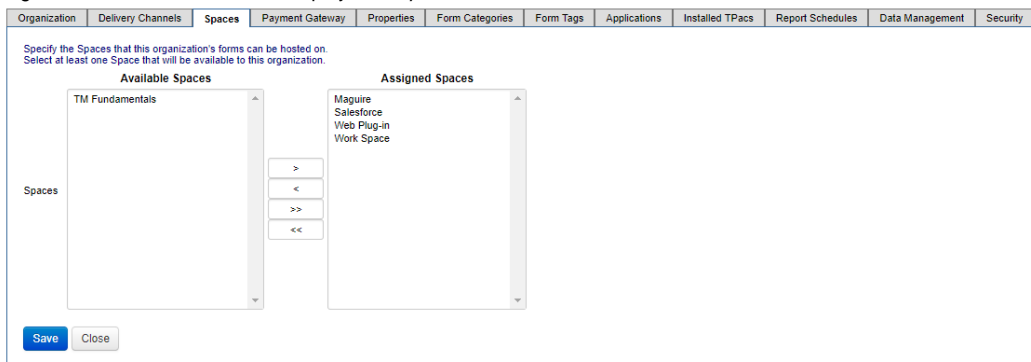
Selecting the "<<" icon will move all Organizations from the *Assigned Organizations* list, to the *Available Organizations* list.

## View Spaces associated with an Organization

The steps below document the process of viewing the list of Spaces that are currently assigned to a selected Organization.

1. *Select Forms > Organizations* from the menu bar.
2. Select the Organization that you want to view currently assigned Spaces for, and click the *Edit Organization* icon  (ensure that the Organization is editable).
3. Switch to the *Spaces* tab.

Switching to this tab will direct you to the *Space Selection* page. The *Space Selection* page displays two lists, the first list identifies each of the Spaces that are available to be assigned to the Organization, and the second list identifies the Spaces currently assigned to the selected Organization. The screen below displays the *Space Selection* screen.



The screenshot shows a web application interface with a navigation bar at the top containing tabs: Organization, Delivery Channels, Spaces, Payment Gateway, Properties, Form Categories, Form Tags, Applications, Installed TPacs, Report Schedules, Data Management, and Security. The 'Spaces' tab is active. Below the navigation bar, there is a header area with the text: 'Specify the Spaces that this organization's forms can be hosted on. Select at least one Space that will be available to this organization.' The main content area is divided into two columns: 'Available Spaces' and 'Assigned Spaces'. The 'Available Spaces' list contains 'TM Fundamentals'. The 'Assigned Spaces' list contains 'Maguire', 'Salesforce', 'Web Plug-in', and 'Work Space'. Between the two lists are four arrow buttons: '>', '<', '>>', and '<<'. At the bottom left of the main content area are 'Save' and 'Close' buttons.

## Assign Spaces to an Organization

Follow the steps below to assign Spaces to a selected Organization.

1. Select the Space that you want to assign to a selected Organization (from the *Space Selection* screen).
2. Click the ">" icon to move the selected Organization from the *Available Spaces* list to the *Assigned Spaces* list.
3. Click the *Save* button

Selecting the "<" icon will move the selected Space from the *Assigned Spaces* list, to the *Available Spaces* list.

Selecting the ">>" icon will move all Spaces from the *Available Spaces* list, to the *Assigned Spaces* list.

Selecting the "<<" icon will move all Spaces from the *Assigned Spaces* list, to the *Available Spaces* list.

# Web Plug-In Space (Manager v5.1)

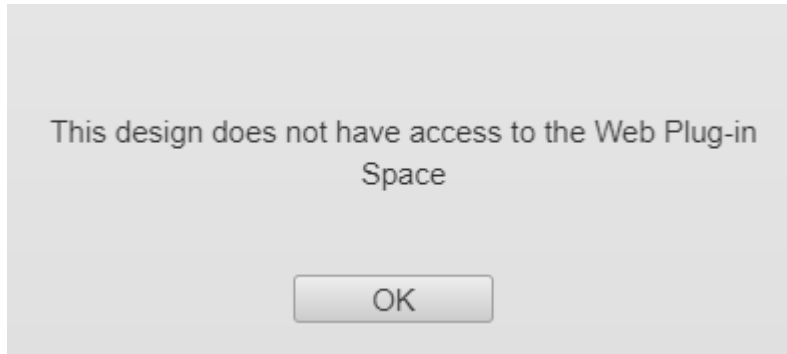
Unknown macro: 'redirect'

## Related Pages:

## Web Plug-In

The Web Plug-In space is the only form space that is readily available on *a//*servers. Client servers have customized form spaces, but with Maestro being a shared hosted server, we need a common form space available for publishing to ensure no errors occur on client systems during import.

If you try to build the TM form version in Maestro from an organization that does not have access to the Web Plug-In you will receive the following error message.



If you receive this error message, you will need to contact your user account administrator. Using the process found on the [Associate Organizations with a Space \(Manager v5.1\)](#) page they can add the Web Plug-In space to your organization.

Once the form has been imported into Transact Manager you can assign the desired form spaces as needed. See [Assign Form Space to Form \(Manager v5.1\)](#) for more information.

In previous versions of Maestro, Maguire was the default form space used. Please note that the Maguire form space is an *example only*, and should never be loaded in an environment higher than Development. Think of the Maguire form space as an installation verification sample, it is Avoka's way to ensure a server is configured properly.

### Error rendering macro 'contentbylabel'

```
com.atlassian.renderer.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.
```

# Associate Forms with a Space (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

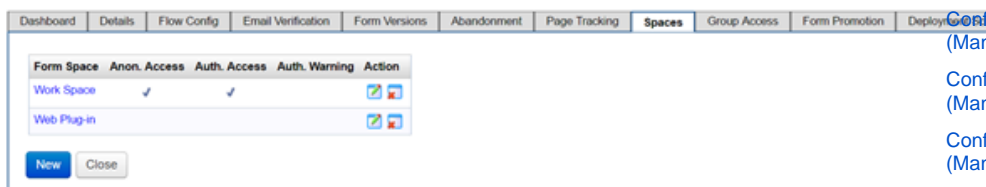
- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)






## Associate Forms with a Space

The steps below document the process of associating a form with a form space. The spaces available to a form are determined by the spaces associated with the form's Organization.

1. Select *Forms* > *Forms from the menu bar*.
2. Select the form that you want to associate with a space and click the edit () icon. Clicking this icon will display the dashboard of the selected form.
3. Switch to the *Spaces* tab.

Switching to this tab will display the list of spaces that are currently associated with the selected form. The screenshot below displays the list of spaces currently associated with the selected form.



Form Space	Anon. Access	Auth. Access	Auth. Warning	Action
Work Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		 
Web Plug-in				 

[Configure Space Properties \(Manager v17.10\)](#)

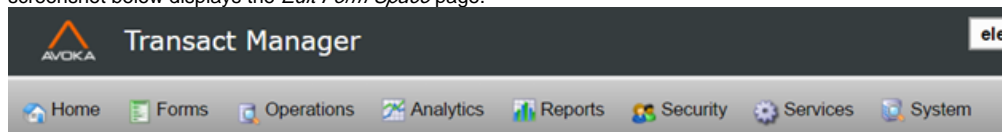
[Configure Space Properties \(Manager v5.1\)](#)

[Configure Space Resources \(Manager v17.10\)](#)

[Configure Space Resources \(Manager v5.1\)](#)

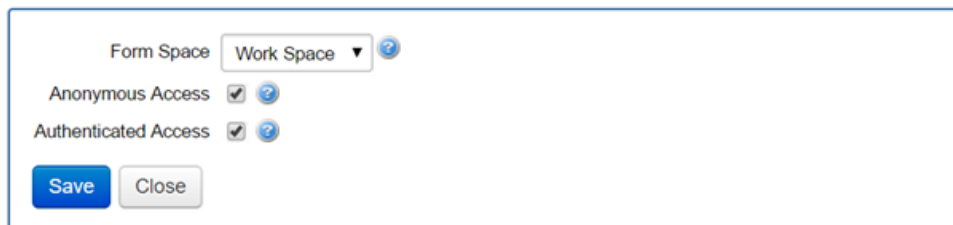
 "Web Plug-in" is the default space used for TM form versions built in Maestro.

4. Click the *New* button. Clicking this button will direct you to the *Edit Form Space* page. The screenshot below displays the *Edit Form Space* page.




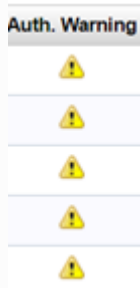
## Edit Form Space






Home Dashboard > Forms > Form > Form Space



5. Use the *Form Space* dropdown menu to select the Form Space that you want to associate with the selected form.
6. Check 'Anonymous Access' if you want the form to be accessed by anonymous users
7. Check 'Authenticated Access' if you want to allow authenticated users to access the forms and tasks in the selected form space.
8. Click the *Save* button.

 You can check both 'Anonymous' and Authenticated' access. However, if the access authorized at the space level is different to that set at a form level, then the following column will be added to the list of forms that are configured for the selected space.



Auth. Warning








# Edit the Status of a Space (Manager v5.1)

Unknown macro: 'redirect'

## Edit the Status of a Space

Transact Manager allows you to restrict access to a form space by changing the status of the space. Currently, a form space in Transact Manager can be one of the following two statuses.

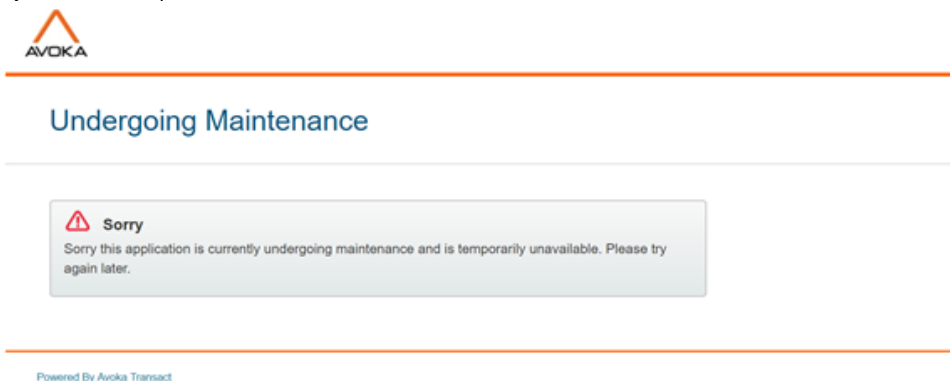
- Normal – A space with the status of normal is currently in use and readily available to all space users
- Offline – A Space with the status of *Offline* is currently unavailable to space users

Restricting access to a form space is achieved by managing the status of the space and developing status messages to explain why the space is currently restricted. If a space is applied with the status of *offline*, users cannot access any content on that space - instead, users will be directed to a space-specific page that displays a status message to the user. Once the space is back into a *normal* status, all content will once again be accessible.

The steps below document the process of editing the status of a Form Space.

1. Select *Forms > Form Spaces* from the menu bar.
2. Select the space that you want to edit the status for and click the *Edit Space* icon (ensure that the space is editable).
3. Switch to the *Status* tab.  
Switching to this tab will direct you to the *Edit Status* page. The screen below displays the *Edit Status* screen.

4. Set the status of the space using the Status dropdown menu.  
Select *offline* to make the space unavailable, or select *normal* to make the space accessible to all form users (the status that the space is currently configured to will be displayed).
5. Produce the *Offline Status Title*.  
This is the page heading that will be presented on the page that will display the *Offline Status Message*.
6. Produce the *Offline Status Message*.  
This is the message that will be displayed on the page the space user will be directed to when the space is unavailable (this message is only relevant when the space is in offline status). When in offline status, requests made for any content belonging to the space are redirected to the *Offline* space page.
7. Click the *Save* button.  
Your changes will only be applied once the *Save* button has been clicked. The screenshot below displays what a form space looks like when it is offline.



In addition, requests for forms can be handled more intelligently by using an offline message specific to the form. To set up a customized offline message for a form, edit the form and add a property of type "Offline

### Related Pages:

- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)
- [Configure Space Properties \(Manager v5.1\)](#)
- [Configure Space Resources \(Manager v17.10\)](#)
- [Configure Space Resources \(Manager v5.1\)](#)

Status Message". This message will override the offline status message when space users attempt to access a page specific to the form (eg the landing page).

# Hot Deploying a Space (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

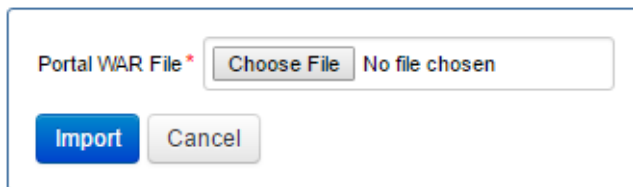
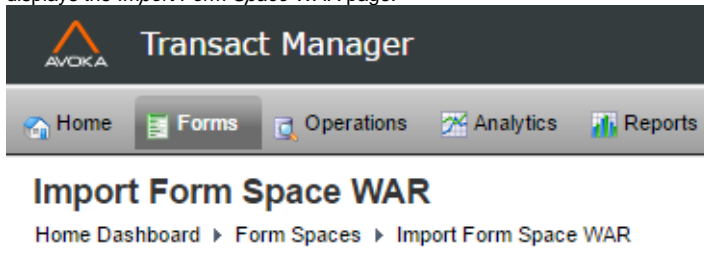
- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)
- [Configure Space Properties \(Manager v5.1\)](#)
- [Configure Space Resources \(Manager v17.10\)](#)
- [Configure Space Resources \(Manager v5.1\)](#)

## Hot Deploying a Space

"Hot deploying" a space refers to the process of updating the underlying WAR file on the Transact Manager application server without shutting down the server and restarting it. "Hot deploying" allows for on-the-fly changes to be made to the WAR file. This "hot deployment" of spaces is achieved by importing an updated WAR file via the TM management console.

The steps below document the process of "hot deploying" a space.

1. Select *Forms* from the menu bar and then select *Form Spaces* from the forms dropdown.
2. Click the *Import WAR* button.  
Clicking this button will direct you to the *Import Form Space WAR* page. The screenshot below displays the *Import Form Space WAR* page.



3. Click the *Choose File* button
4. Browse to the updated WAR file on your computer and select it.  
If overwriting an existing WAR file, ensure that the file name matches – otherwise conflicts may occur.
5. Click the *Import* button.

**i** It is recommended that you only use this functionality on development servers. It is also recommended that you restrict access to the feature (using the *Import Space* permission) as accidental or malicious deployment of WAR files can potentially be very harmful to a Transact Manager environment. Also, when upgrading to a new version of Transact Manager, it is recommended that you do not use this feature to update the WAR files, but instead follow the provided upgrade instructions. If you do use this feature to upgrade, double check that the space is operating as expected and that there are no usability or accessibility issues.


# Delete a Space (Manager v5.1)

 Unknown macro: 'redirect'

## Delete a Space

Before deleting a space, you should check if there are any forms still associated with the space. If there are forms associated with the space, they will not render once the space has been deleted. You can fix this issue by associating these forms to a different space before deleting the space.


The steps below document the process of deleting a space in Transact Manager.

1. Select *Forms* from the menu bar and then select *Form Spaces* from the forms dropdown.
2. Select the space that you want to delete and click the *Remove Space* () icon. You will be asked for confirmation before the space is deleted.
3. Confirm the deletion of the space by clicking *OK*.

### Related Pages:

- [Associate Forms with a Space \(Manager v17.10\)](#)
- [Associate Forms with a Space \(Manager v5.1\)](#)
- [Associate Organizations with a Space \(Manager v17.10\)](#)
- [Associate Organizations with a Space \(Manager v5.1\)](#)
- [Configure Pages for a Space \(Manager v17.10\)](#)
- [Configure Pages for a Space \(Manager v5.1\)](#)
- [Configure Space Properties \(Manager v17.10\)](#)
- [Configure Space Properties \(Manager v5.1\)](#)
- [Configure Space Resources \(Manager v17.10\)](#)
- [Configure Space Resources \(Manager v5.1\)](#)


# System Logs (Manager v5.1)

 Unknown macro: 'redirect'

The content within this section covers information relating to systems logs that can be viewed in Transact Manager.

Below you will find a list of topics within this section.

- [Event Log \(Manager v5.1\)](#)
- [Error Log \(Manager v5.1\)](#)
- [System Information \(Manager v5.1\)](#)
- [Database Version Log \(Manager v5.1\)](#)

 Unknown macro: 'disable-content-rating-macro'

# Event Log (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Database Version Log \(Manager v17.10\)](#)
- [Database Version Log \(Manager v5.1\)](#)
- [Error Log \(Manager v17.10\)](#)
- [Error Log \(Manager v5.1\)](#)
- [Event Log \(Manager v17.10\)](#)
- [Event Log \(Manager v5.1\)](#)
- [System Information \(Manager v17.10\)](#)
- [System Information \(Manager v5.1\)](#)

## Event Log

The *Event Log* contains messages logged by Transact Manager. These messages can include notifying users when a submission is delivered, or when an error is encountered when processing a submission.

There are four types of events that are documented and described in the *Event Log*.

- *Info* – An info event is an event describing information concerning the TM management console.
- *Warning* – A warning event identifies when a warning is prompted to a user.
- *Error* – An error event identifies when TM has encountered an error.
- *Security* – A security event identifies an error involving security (usually user accounts and authentication).

## View the Event Log

The *Event Log* is accessed through the *System* menu of Transact Manager. To view the *Event Log*:

1. Navigate to *System* from the *menu bar*.  
Navigating to *System* will display the *System* menu.
2. Select *Event Log* from the *System* menu.  
Selecting *Event Log* will display the Event Log. The screenshot below displays an example *Event Log*.


ID	Time	Type	Message	Action
29	30 Jul 2017 17:51:45	Info	Started Avoka Transact Manager (Version: 5.1.3, Build Number: d0a55da, DB Version: 1779)	
28	23 Jul 2017 17:53:43	Info	Started Avoka Transact Manager (Version: 5.1.3, Build Number: d0a55da, DB Version: 1779)	
27	26 Jul 2017 22:24:07	Security	Security Policy Manager deleted 0 expired user role(s) and 0 expired user group(s), deactivated 0...	
26	16 Jul 2017 17:55:12	Info	Started Avoka Transact Manager (Version: 5.1.3, Build Number: d0a55da, DB Version: 1779)	
24	09 Jul 2017 17:53:51	Info	Started Avoka Transact Manager (Version: 5.1.3, Build Number: d0a55da, DB Version: 1779)	
23	02 Jul 2017 17:51:49	Info	Started Avoka Transact Manager (Version: 5.1.3, Build Number: d0a55da, DB Version: 1779)	

You can filter the *Event Log* by event ID, event type or date.

Clicking the *Details* () icon displays additional details about the selected log. These details include the full message that is displayed.

Click on the *Export Data* link below the table to export the displayed data to an XLS file.

# Error Log (Manager v5.1)

 Unknown macro: 'redirect'

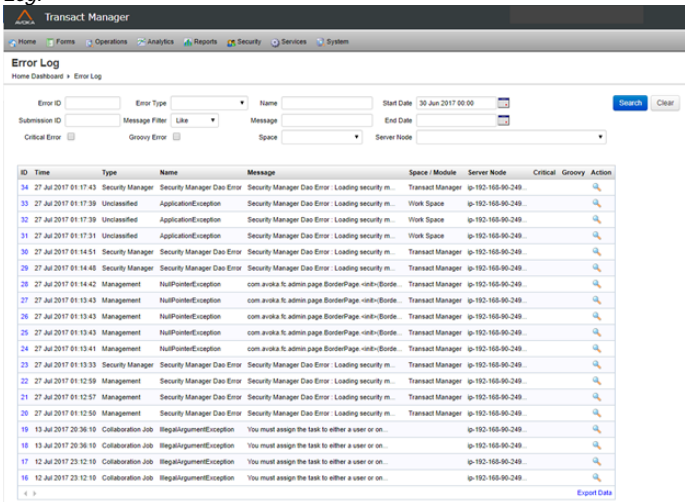
## Error Log



















The *Error Log* is a log that displays any errors that occurred across all Transact spaces and modules for the TM environment. Common examples of *Error Log* entries include error messages resulting from lost database connections, error messages describing faulty form data configurations, and error messages describing delivery errors due to misconfigurations.

## View the Error Log

The *Error Log* is accessed through the *System* menu of Transact Manager. To view the *Error Log*:

1. Navigate to *System* from the *menu bar*.  
Navigating to *System* will display the *System* menu.
2. Select *Error Log* from the *System* menu.  
Selecting *Error Log* will display the error log. The screenshot below displays an example *Error Log*.




ID	Time	Type	Name	Message	Space	Module	Server Node	Critical	Groovy	Action
34	27 Jul 2017 01:17:43	Security Manager	Security Manager Dao Error	Security Manager Dao Error Loading security m.	Transact Manager		ip-192-168-90-249			
33	27 Jul 2017 01:17:39	Unclassified	ApplicationException	Security Manager Dao Error Loading security m.	Work Space		ip-192-168-90-249			
32	27 Jul 2017 01:17:39	Unclassified	ApplicationException	Security Manager Dao Error Loading security m.	Work Space		ip-192-168-90-249			
31	27 Jul 2017 01:17:31	Unclassified	ApplicationException	Security Manager Dao Error Loading security m.	Work Space		ip-192-168-90-249			
30	27 Jul 2017 01:14:51	Security Manager	Security Manager Dao Error	Security Manager Dao Error Loading security m.	Transact Manager		ip-192-168-90-249			
29	27 Jul 2017 01:14:48	Security Manager	Security Manager Dao Error	Security Manager Dao Error Loading security m.	Transact Manager		ip-192-168-90-249			
28	27 Jul 2017 01:14:42	Management	NullPointerException	com.avoka.ft.admin.page.BorderPage.<init>().Border	Transact Manager		ip-192-168-90-249			
27	27 Jul 2017 01:13:43	Management	NullPointerException	com.avoka.ft.admin.page.BorderPage.<init>().Border	Transact Manager		ip-192-168-90-249			
26	27 Jul 2017 01:13:43	Management	NullPointerException	com.avoka.ft.admin.page.BorderPage.<init>().Border	Transact Manager		ip-192-168-90-249			
25	27 Jul 2017 01:13:41	Management	NullPointerException	com.avoka.ft.admin.page.BorderPage.<init>().Border	Transact Manager		ip-192-168-90-249			
23	27 Jul 2017 01:13:33	Security Manager	Security Manager Dao Error	Security Manager Dao Error Loading security m.	Transact Manager		ip-192-168-90-249			
22	27 Jul 2017 01:12:59	Management	Security Manager Dao Error	Security Manager Dao Error Loading security m.	Transact Manager		ip-192-168-90-249			
21	27 Jul 2017 01:12:57	Management	Security Manager Dao Error	Security Manager Dao Error Loading security m.	Transact Manager		ip-192-168-90-249			
20	27 Jul 2017 01:12:50	Management	Security Manager Dao Error	Security Manager Dao Error Loading security m.	Transact Manager		ip-192-168-90-249			
19	13 Jul 2017 20:36:10	Collaboration Job	IllegalArgumentException	You must assign the task to either a user or on.			ip-192-168-90-249			
18	13 Jul 2017 20:36:10	Collaboration Job	IllegalArgumentException	You must assign the task to either a user or on.			ip-192-168-90-249			
17	12 Jul 2017 23:12:10	Collaboration Job	IllegalArgumentException	You must assign the task to either a user or on.			ip-192-168-90-249			
16	12 Jul 2017 23:12:10	Collaboration Job	IllegalArgumentException	You must assign the task to either a user or on.			ip-192-168-90-249			

The type column indicates the module or area where the error occurred. Logs in the *Error Log* can be any of the following types.

- *Management* – Error Logs of type *Management* are errors generated by the TM Management console. Common examples of Management errors are:
  - Errors resulting in the failure of importing, modifying or deleting entries such as forms, spaces, and Organizations from TM.
- *Security Manager* – Error Logs of type *Security Manager* are errors involving the security manager settings configured in Transact Manager.
- *Collaboration Job* - Error Logs of type *Collaboration Job* are errors involving *Collaboration Job* settings configured in Transact Manager.
- *Error* – Error logs of type *Error* are errors that were encountered during the creation and delivery of an email to end users.
- *Form Delivery* - Error logs of type *Form Delivery* are errors that were encountered during the delivery of form data.
- *Unclassified* – Error Logs of type *Unclassified* are errors which cannot be classified under any identified Transact module.

You can filter the *Error Log* by error ID, error type or date, and you can export the search results to Excel by clicking the *Export Data* link below the table.

Clicking the *Details*  icon displays additional details about the selected log.

Click on the *Export Data* link below the table to export the displayed data to an XLS file.

## Related Pages:

- Database Version Log (Manager v17.10)
- Database Version Log (Manager v5.1)
- Error Log (Manager v17.10)
- Error Log (Manager v5.1)
- Event Log (Manager v17.10)
- Event Log (Manager v5.1)
- System Information (Manager v17.10)
- System Information (Manager v5.1)

# System Information (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Database Version Log \(Manager v17.10\)](#)
- [Database Version Log \(Manager v5.1\)](#)
- [Error Log \(Manager v17.10\)](#)
- [Error Log \(Manager v5.1\)](#)
- [Event Log \(Manager v17.10\)](#)
- [Event Log \(Manager v5.1\)](#)
- [System Information \(Manager v17.10\)](#)
- [System Information \(Manager v5.1\)](#)

## System Information

Transact Manager provides a *System Information* page. This page displays information about runtime load, information about the properties used to build the selected version of Transact Manager, and the system properties used by the TM environment you are logged into.

To access the *System Information* page:

1. Navigate to *System* from the *menu bar*.  
Navigating to *System* will display the *System* menu.
2. Select *System Information* from the *System* menu.  
Selecting *System information* will display the *System Information* page. The images below display examples of the three sections that make up the *System Information* page.

### Runtime Info

<b>Current Process ID</b>	1439
<b>Active Threads</b>	101
<b>Free Memory</b>	3,225 MB
<b>Total Memory</b>	4,096 MB
<b>Max Memory</b>	4,096 MB
<b>Number CPU / Cores</b>	2
<b>CPU Speed</b>	2.14 GHz
<b>Server Uptime</b>	95 hours

### Build Properties

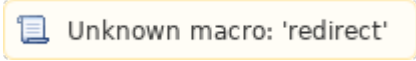
Name	Value
cookie.secure	true
data.retention.policy	strict
database.product	mysql
database.schema	knowledgeteam_fm
deployment.env	aws
form.types	Composer SmartForm, Maestro Form, Dynamic PDF Form, Static PDF Form, Other Document
formcenter.version	5.1.3
groovy.client.data.isolation	true
groovy.secure.api	false
installation.dir	/data/avoka/transact/manager
lifecycle.version	none
revision.number	d0a55da
system.license.key	qj4mwKOaRGc8oxaJJaOJ/DNgAYoLGB0zpEuoWhXlwatQFJBoP6Z6rfADKrcweK39hXEc2VBS83ITmOcZgFLig==

### System Properties

Name	Value
RUN_UNDER_ECLIPSE	false
[Standalone]	
awt.toolkit	sun.awt.X11.XToolkit
cayenne.server.contexts_sync_strategy	false
com.amazonaws.services.s3.enableV4	true
com.avoka.component.httpClient.connectTimeout	10000
com.avoka.component.httpClient.socketTimeout	60000
com.avoka.core.cayenne.query.cache.enabled	true
com.avoka.core.cayenne.query.cache.size	2048
com.avoka.core.cayenne.query.cache.timeout	30
com.avoka.core.cayenne.query.profiling.detail	false
com.avoka.core.cayenne.query.profiling.enabled	false
com.avoka.core.cayenne.query.profiling.threshold	30000
com.avoka.core.cayenne.query.timeout	600
com.avoka.core.groovy.script.cache.timeout	12
com.avoka.core.util.XmlUtils.enableDoctypeProcessing	false
com.avoka.core.util.XmlUtils.stripSurrogateCharacters	true
com.avoka.fc.core.servlet.backgroundSaveRevisionCheck	true
com.sun.jndi.ldap.connect.pool.protocol	plain ssl
com.sun.jndi.ldap.connect.pool.timeout	300000

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# Database Version Log (Manager v5.1)



## Database Version Log

When Transact Manager is started, it checks the database to see what version the database schema is at and runs update statements as necessary. All these automatic updates are logged to the *Database Version Log*. This log is useful in identifying the database version that TM is currently using.

To view the *Database Version Log*:

1. Navigate to *System* from the *menu bar*.  
Navigating to *System* will display the *System* menu.
2. Select *Database Version Log* from the *System* menu.  
Selecting *Database Version Log* will display the *Database Version Log*. The screenshot below displays an example *Database Version Log*.

Database Version Log  
Home Dashboard > Database Version Log

search Start Date End Date Search Clear

Version	Release	Time	Rows Updated	Duration (ms)	Update Performed	Action
1779	5.1.0	18 Apr 2017 14:09:23	0	13	delete from service_parameter where service_oid in (select service_oid from service_definition where servic...	
1778	5.1.0	18 Apr 2017 14:09:23	0	41	alter table library_resource_history add comments varchar(100) null;	
1777	5.1.0	18 Apr 2017 14:09:23	0	36	create unique index ix_application_client_property on application_client_property (application_package_oid...	
1776	5.1.0	18 Apr 2017 14:09:23	0	0	No statement was required for database type: mysql;	
1775	5.1.0	18 Apr 2017 14:09:22	0	31	create table application_client_property (application_client_prop_oid bigint not null auto_increment, appli...	
1774	5.1.0	18 Apr 2017 14:09:22	0	28	create index ix_email_queue_submission on email_queue (submission_oid);	
1773	5.1.0	18 Apr 2017 14:09:22	0	0	No statement was required for database type: mysql;	
1772	5.1.0	18 Apr 2017 14:09:22	0	30	create table email_queue_data (body_data longblob not null, email_queue_data_oid bigint not null auto_incre...	
1771	5.1.0	18 Apr 2017 14:09:22	0	64	alter table email_queue add email_queue_data_oid bigint null;	
1770	5.1.0	18 Apr 2017 14:09:22	0	63	alter table email_queue drop email_priority; drop model; drop template_bcc; drop template_body; drop templa...	
1769	5.1.0	18 Apr 2017 14:09:22	18	9	delete from email_queue where email_status = 'Completed' or email_status = 'Plugged';	
1768	5.1.0	18 Apr 2017 14:09:22	0	44	create index ix_email_queue_status on email_queue (email_status);	
1767	5.1.0	18 Apr 2017 14:09:22	0	34	create index ix_submission_extract_search_sub on submission_extract_search (submission_oid);	
1766	5.1.0	18 Apr 2017 14:09:22	0	30	create index ix_submission_extract_join_sub on submission_extract_join (submission_oid);	
1765	5.1.0	18 Apr 2017 14:09:22	0	9	update transaction_history th inner join submission s on th.submission_oid = s.submission_oid set th.form_a...	
1764	5.1.0	18 Apr 2017 14:09:22	3	7	update portal set portal_type = 'Transact Manager' where portal_type = 'Transaction Manager';	
1763	5.1.0	18 Apr 2017 14:09:22	1	7	update portal set name = 'Transact Manager' where name = 'Transaction Manager';	
1762	5.1.0	18 Apr 2017 14:09:22	0	6,568	alter table template_version_data add form_design_metadata longblob null;	
1761	5.1.0	18 Apr 2017 14:09:15	0	267	alter table template_version add metadata_publish_time datetime null;	
1760	5.1.0	18 Apr 2017 14:09:15	0	292	alter table template_version add metadata_publish_status varchar(20) null;	


1-28 of 93 Export Data

Total Duration: less than 1 minute

The *Database Version Log* lists all updates applied to the database since the Transact Manager system was initially established and configured. Each log entry contains a version number and a description identifying the update performed.

You can filter the *Database Version Log* by one or both of:

- Enter in the search box one of:
  - The number to search release number in the *Release* column.
  - A substring to search the description in the *Update Performed* column.
- Select a date range from each of the date pickers for *Start Date* and *End Date*. This date range represents a release window for filtering on one or more releases.

Clicking the *View* () icon displays further details regarding the selected version, including the update performed to the database.

Click on the *Export Data* link to export the displayed data to an XLS file.

### Related Pages:

- [Database Version Log \(Manager v17.10\)](#)
- [Database Version Log \(Manager v5.1\)](#)
- [Error Log \(Manager v17.10\)](#)
- [Error Log \(Manager v5.1\)](#)
- [Event Log \(Manager v17.10\)](#)
- [Event Log \(Manager v5.1\)](#)
- [System Information \(Manager v17.10\)](#)
- [System Information \(Manager v5.1\)](#)

# Configure Virus Scanning for Attachments (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Configure Virus Scanning for Attachments \(Manager v17.10\)](#)
- [Configure Virus Scanning for Attachments \(Manager v5.1\)](#)
- [Copy an Organization \(Manager v17.10\)](#)
- [Copy an Organization \(Manager v5.1\)](#)
- [Create a New Group \(Manager v17.10\)](#)
- [Create a New Group \(Manager v5.1\)](#)
- [Create a New Role \(Manager v17.10\)](#)
- [Create a New Role \(Manager v5.1\)](#)
- [Create a New User Account \(Manager v17.10\)](#)
- [Create a New User Account \(Manager v5.1\)](#)

## Page Contents:

- [Configure Virus Scanning for Attachments](#)
- [Activating a Virus Scanning Service](#)

## Configure Virus Scanning for Attachments

To avoid users attaching malicious or infected files, Transact Manager offers several virus scanning services. When a virus scanning service is configured, Transact Manager will check each attached file for viruses. The delivery of these attachments will only be completed once they have been scanned and marked as free of viruses or malicious software. If an attachment is scanned and found to contain a virus, it is automatically deleted and the end-user who uploaded the attachment is notified.

Transact Manager supports the following virus scan engines.


- Symantec Virus Scanning
- ClamAV

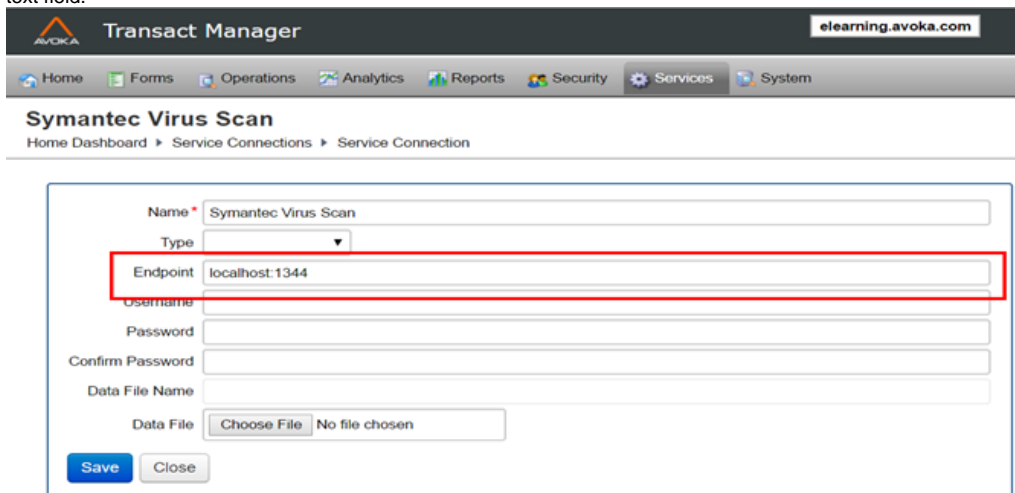
## Setting Up the Symantec Virus Scanning Service

Transact Manager includes a virus scanning service that can connect to the Symantec Protection Engine (<https://www.symantec.com/products/endpoint-hybrid-cloud-security/hybrid-cloud-security/protection-engine>). For this service to be successfully activated, you need to have the Symantec Scan Engine set up and configured. For steps on how to set up and configure this scanning engine, refer to the Symantec website and documentation.

If your setup of Symantec Protection Engine is running on a different server or port other than the default (localhost 1344), then you will have to edit the service connection.

To edit the service connection:

1. Select *Services* from the menu bar. Selecting this option will display the *Services Menu*.
2. Select *Service Connections* from the *Services Menu*. Selecting *Service Connections* will display the list of service connections currently configured in your instance of Transact Manager.
3. Select *Symantec Virus Scan* and click the edit icon (). Clicking the edit icon will direct you to the *Service Connection Edit* page.
4. Update the server name or port using the Endpoint text field. The screenshot below highlights this text field.



The screenshot shows the Transact Manager interface. At the top, there is a navigation bar with the Avoka logo and the text 'Transact Manager' and 'elearning.avoka.com'. Below the navigation bar, there are several menu items: Home, Forms, Operations, Analytics, Reports, Security, Services, and System. The 'Services' menu item is selected. Below the navigation bar, there is a breadcrumb trail: Home Dashboard > Service Connections > Service Connection. The main content area shows the 'Symantec Virus Scan' configuration page. The 'Name' field is set to 'Symantec Virus Scan'. The 'Type' field is a dropdown menu. The 'Endpoint' field is highlighted with a red box and contains the text 'localhost:1344'. Below the 'Endpoint' field are fields for 'Username', 'Password', and 'Confirm Password'. There is also a 'Data File Name' field and a 'Data File' field with a 'Choose File' button and the text 'No file chosen'. At the bottom of the form, there are 'Save' and 'Close' buttons.

5. Click the *Save* button.

## Setting Up the ClamAV Virus Scanning Service

Transact Manager also includes a virus scanning service that can connect to ClamAV (<https://www.clamav.net/>). For this service to be successfully activated, you need to have ClamAV set up and configured. For steps on how to set up and configure ClamAV, refer to the ClamAV website and documentation.

If your set up of ClamAV is running on a different server or port other than the default (localhost 3310), then you will have to edit the service connection.

To edit the service connection:

1. Select *Services* from the menu bar.  
Selecting this option will display the *Services Menu*
2. Select *Service Connections* from the *Services Menu*  
Selecting *Service Connections* will display the list of service connections currently configured in your instance of Transact Manager.
3. Select *ClamAV Virus Scan* and click the edit icon (🔗).  
Clicking the edit icon will direct you to the *Service Connection Edit* page.
4. Update the server name or port using the Endpoint text field. The screenshot below highlights this text field.

The screenshot shows the 'ClamAV Virus Scan' service connection configuration page in Transact Manager. The 'Endpoint' field is highlighted with a red box and contains the text 'localhost:3310'. Other fields include Name, Type, Username, Password, Confirm Password, Data File Name, and Data File (Choose File). Buttons for Save and Close are at the bottom.

5. Click the *Save* button.

## Activating a Virus Scanning Service

Once at least one virus scanning service has been set up, it is time to activate it for use in Transact Manager. Services are activated in Transact Manager by identifying one as the *Service Type Default*.

To activate a virus scanning service:

1. Select *Services* from the menu bar.  
Selecting this option will display the *Services Menu*.
2. Select *All Services* from the *Services Menu*.  
Selecting *All Services* will display the list of services currently configured in your instance of Transact Manager.
3. Select the virus scanning service that you want to activate and click the edit icon (🔗).  
Clicking the edit icon will direct you to the *Service Edit* page. The screenshot below displays this page.

The screenshot shows the 'ClamAV Virus Scan - v1' service definition page in Transact Manager. The 'Service Type Default' checkbox is checked. Other fields include Service Name, Version Number, Current Version, Description, Service Type, Organization, Service Creation Method, Classname / Bean Name, Service Connection, and Server Node. Buttons for Save and Close are at the bottom.

4. Select the *Service Type Default* checkbox.  
Selecting this checkbox will designate the selected virus scan service as the default service for the virus scan service type. The screenshot below highlights this checkbox.

Transact Manager elearning.avoka.com

Home Forms Operations Analytics Reports Security **Services** System

### ClamAV Virus Scan - v1

Home Dashboard > All Services > Service Definition

**Service Definition** Parameters Edit Parameters

Service Name\* ClamAV Virus Scan

Version Number\* 1

Current Version

Description

Service Type Virus Scan

Organization

**Service Type Default**

Service Creation Method\* Java Classname

Classname / Bean Name\* com.avoka.fc.core.service.impl.ClamAVVirusScanService

Service Connection ClamAV Virus Scan Edit

Server Node


Active

Save Close

5. Click the *Save* button.

**i NOTE:** To deactivate a virus scanning device, unselect the *Service Type Default* checkbox and click the *Save* button.

# Maestro Form Configuration in TM (Manager v5.1)


 Unknown macro: 'redirect'

The content within this section covers information relating to configuring and working with forms in Transact Manager.

Below you will find a list of topics within this section.

- [Import Maestro Form \(Manager v5.1\)](#)
- [View Maestro Forms in TM \(Manager v5.1\)](#)
- [Working with Maestro Form Versions \(Manager v5.1\)](#)
- [Configure Data for a Form Version \(Manager v5.1\)](#)
- [Delivery Channels \(Manager v5.1\)](#)
- [Receipts \(Manager v5.1\)](#)
- [Language Translator in Transact Manager \(Manager v5.1\)](#)
- [Submissions and Operations \(Manager v5.1\)](#)

# Import Maestro Form (Manager v5.1)

 Unknown macro: 'redirect'

The content within this section covers information relating to importing Maestro forms into Transact Manager.

Below you will find a list of topics within this section.

- [Build TM Form Version \(Manager v5.1\)](#)
- [Update TM Form Versions \(Manager v5.1\)](#)
- [Update TM Form Versions \(v5.0.6 or later\) \(Manager v5.1\)](#)

# Build TM Form Version (Manager v5.1)

Unknown macro: 'redirect'

### Related Pages:

Error rendering macro 'contentbylabel'  
com.atlassian.renderer.v2.macro.  
MacroException: Error parsing 'sort' or 'reverse' parameter.

### Page Contents:

- [Overview](#)
- [Build TM Form Version](#)
- [Import the Zip File to Transact Manager](#)
- [Common Errors when Building a TM Form Version](#)
  - [Duplicate Binding](#)

## Overview

In Maestro 5.1 the *Publish* button has been replaced with the *Build* button. Please note that this change has only been made to the form (in design mode). Custom Components and Templates will still have the "Publish" button.

There are two parts that make up the process of migrating (publishing) a form from Maestro to Transact Manager.

**i** This process is usually only used for import into lower environments (such as Test or UAT). When promoting a form to a higher environment this is done using an exported file from TM.

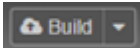
1. Build the TM form version in Maestro (creating a zip file)
2. Import the zip file (the TM form version) to Transact Manager

The *Build* button will create a TM form version. The TM form version is a FAR file that is included in a zip file, which then needs to be imported into TM. Once imported to TM the user will be able to configure the form as needed. You must complete the import process in order to work with the form in TM.

## Build TM Form Version

The Build button and dropdown will allow the user to:

1. Build a TM form version that can be downloaded for import into TM or
2. Build a TM form version which can be quickly viewed and downloaded later



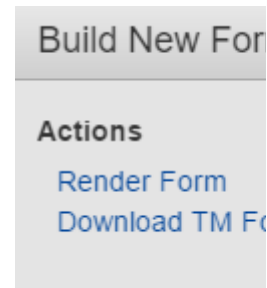
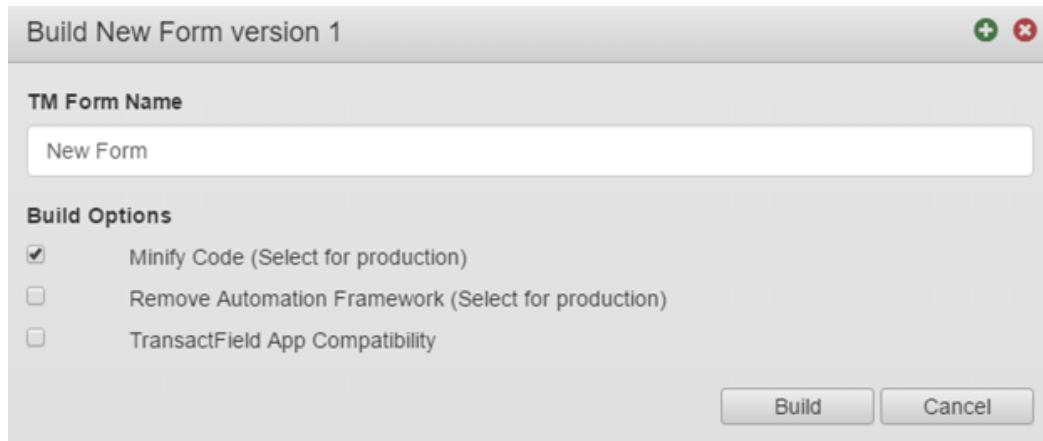
There are four options available from the Build (  ) button and dropdown.

**Build** – Clicking the Build button (not the dropdown arrow) will build the TM form version. This will not download the TM form version or display the rendered form. This option is useful when you are re-building a TM form version that is already imported into Transact Manager. See [Update TM Form Versions \(v5.0.6 or later\) \(Manager v5.1\)](#) for more information.

**Build and Download TM Form Version** - This will build a TM form version then immediately download the zip file needed for import into TM.

**Build and Render Form** - This will build a TM form version (which can be downloaded from the Management Dashboard) and render the form in a new tab. This option will most likely be used when you need to view or test a rendered version of the form. In order to configure the form in TM the user will need to download the TM form version and import it into TM.

**Build with Options** - This will display the Build window with options available for preparing the TM form version. Once the TM form version is built you will have the option to download or view rendered form.



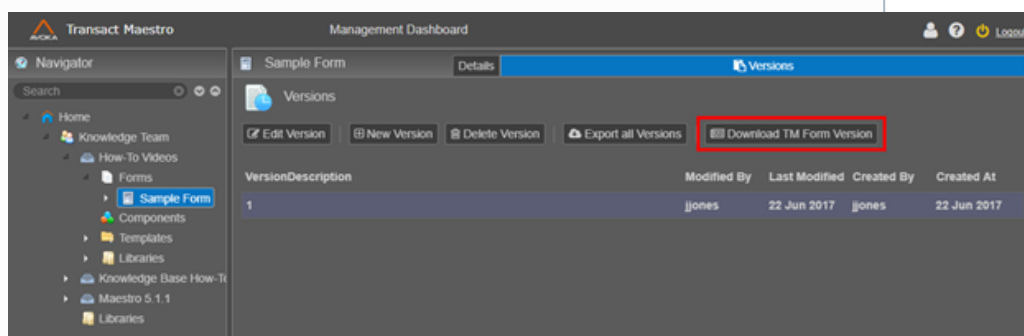
**TM Form Name** – This is the name of the form as it will appear in Transact Manager. By default it will pre-populate with the existing name of the form, however you can change it as needed.

**Minify Code (Select for production)** - *Minify Code* is the process that reduces the size of the form without changing its functionality. Selecting this option will make the form more efficient to transmit. However, reducing the code makes it difficult to read, so consider deselecting this option when debugging.

**Remove Automation Framework (Select for production)** - The *Maestro Automation Framework* (MAF) provides an API which can be used by other tools to automate and investigate the state of a Maestro form. Once a form is ready for production, it should be built with the *Remove Automation Framework* option selected to remove the MAF code. Selecting this option will reduce the download size of the form and prevent misuse of the API in production forms.

**TransactField App Compatibility** - Avoka Transact Field is a mobile application available for Apple, Android, and Microsoft Windows devices. This application synchronizes these devices with mobile forms or data capture applications that are built using the Avoka Transact platform. Select this option if you would like the form you are building to be compatible with the Transact Field application

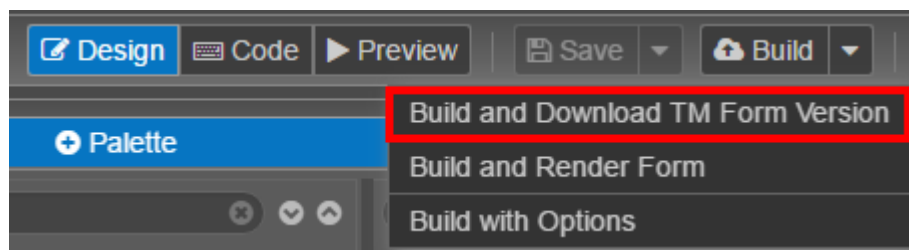
**i** Please note that once a TM form version is built the user can download the form at any time from the *Management Dashboard*. The *Download TM Form Version* button is available on the *Versions* screen of the *Management Dashboard*. This button will only be available for selection once the TM form version has been built (in Maestro) at least once. The screenshot below highlights the *Download TM Form Version* button.



## Import the Zip File to Transact Manager

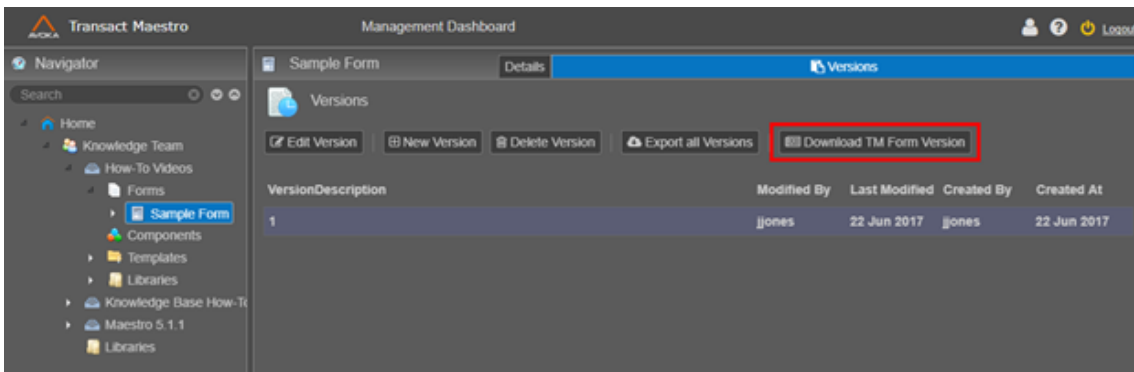
**i** The TM form version zip file from Maestro is usually only used for import into lower environments (such as Test or UAT). When promoting a form to a higher environment this is done using an exported file from TM.

Once the TM form version is built and downloaded you will need to import the zip file into TM. The easiest way to build the form and download the zip is to select *Build and Download TM Form Version* from the *Build* button in Maestro.



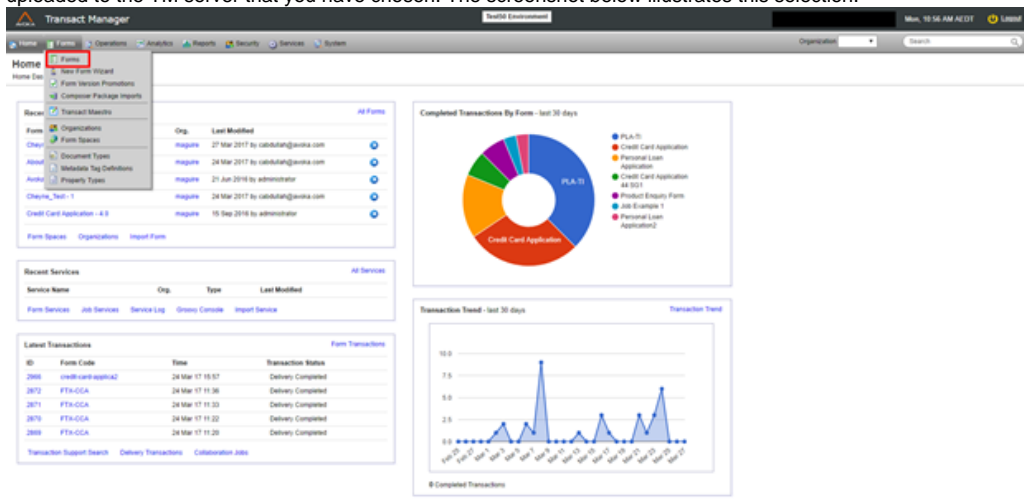
If you use one of the other *Build* options (Build and Render Form or Build with Options), or need to re-download the build TM Form Version you can do so from the *Management Dashboard*.

The *Download TM Form Version* button is available on the *Versions* screen of the *Management Dashboard*. This button will only be available for selection once the form has been built (in Maestro) at least once. The screenshot below highlights the *Download TM Form Version* button.

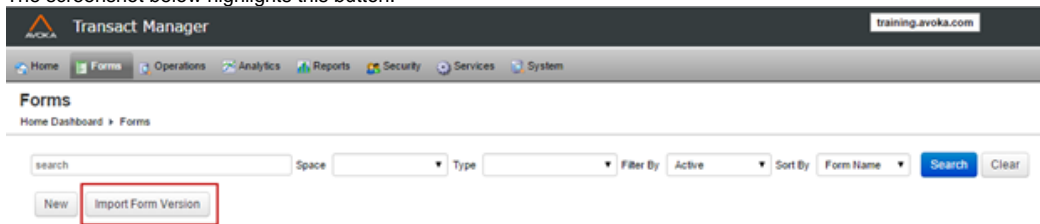


Now that you have built the TM form version and downloaded a zip file of the form, it is time to import the zip file into TM.

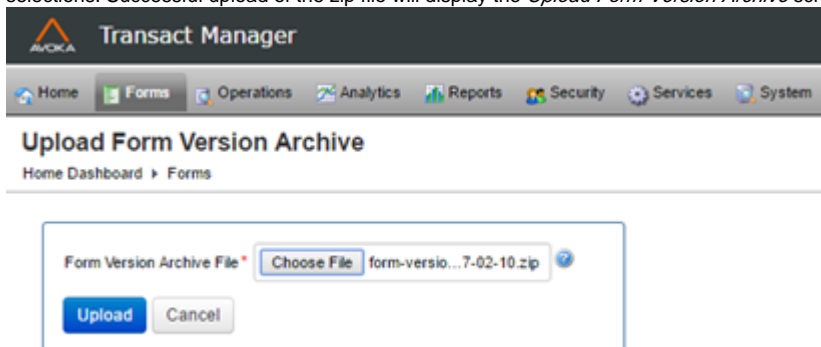
1. Navigate to the Transact Manager server that you wish to import the form into and log in. Logging in will redirect you to the *Home Dashboard*.
2. Select *Forms* from the *Forms* menu. This selection will display the forms page. The forms page displays every form that has been uploaded to the TM server that you have chosen. The screenshot below illustrates this selection.



3. Select the *Import Form Version* button. The screenshot below highlights this button.




4. Select the *Choose File* button. Selecting this button will allow you to browse for and select the downloaded zip file. Once you have selected the appropriate zip file, click *Upload*. The screenshot below illustrates these selections. Successful upload of the zip file will display the *Upload Form Version Archive* screen.



- Select the appropriate organization (if relevant) for the form from the dropdown menu. You will only see the *Add to Organization* dropdown if you have access to more than one organization.

- Select *Create a Form* from the available options.
  - Create a Form** - Selecting this option will display the *New Form Code* textbox. Transact Manager will automatically fill this textbox with a suggested name for the form. If you wish, you may change it. Enter a name that is unique across all organizations, also must be an alphanumeric string without any spaces. The screenshot below illustrates this option.

 Update an Existing Form is used when you need to update a form that has previously been imported into Transact Manager. Please see Update TM Form Version for more information.

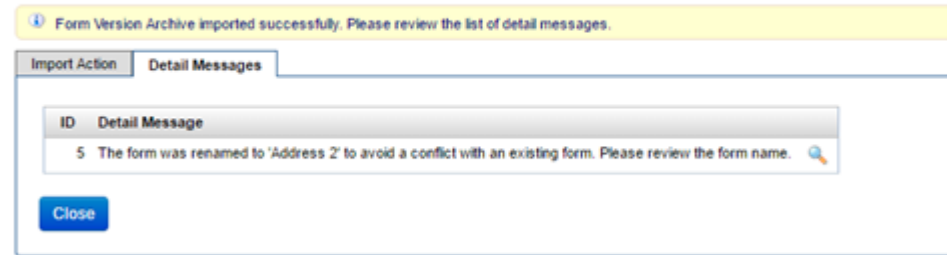
- Click *Proceed to Import*  
Clicking this button will display the options screen for the form. It is on this page that you can select or unselect any options that you may want to override. Ensure that you select the option, *Make Current Version*, if you want to make the form that you are uploading the current version of the form (ie the form that your form users will be completing). The screenshot below illustrates the options screen and highlights the *Make Current Version* option.

- Select *Import*  
Selecting import will officially import the form into the TM server environment and display the summary screen. Note that if the *Create a New Form* option was selected during the import process, and there was a form naming conflict (ie a form with the same name already existing on

the server), the form will be renamed, and a message will be displayed in the *Detail Messages* tab. The screenshot below illustrates a *Detail Messages* screen displaying a form name error.

## Import Action

Home Dashboard > Forms

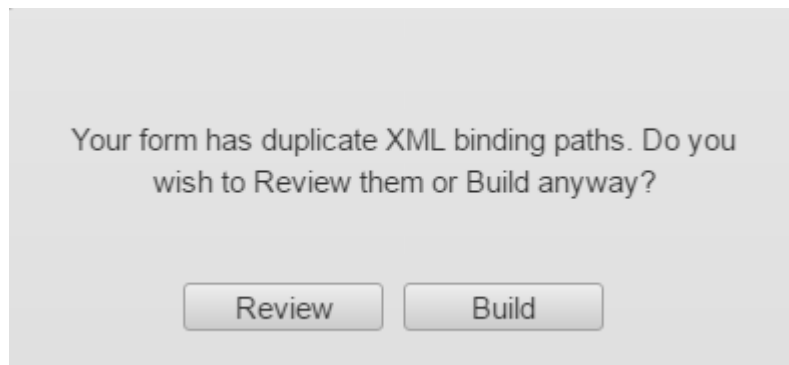


9. Click the *Close* button  
Selecting close will redirect you back to the forms page.

## Common Errors when Building a TM Form Version

### Duplicate Binding

One common error that occurs when building a TM form version is a duplicate binding. This occurs when a form builder tries to build a TM form version with duplicate submission data bindings on the form. When this error is encountered by Maestro, the following message is displayed.



In building the TM form version, Maestro has detected that two or more components share the same data binding location; this message is a warning that users may experience unintended behavior during data entry. Clicking *Build* confirms that you are aware of the duplicate binding and wish to proceed; clicking *Review* stops Maestro from building the form and displays a list of the duplicate bound components.

# Update TM Form Versions (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

## Page Contents:

- [Overview](#)
- [Create TM Form Version](#)
- [Import the Zip File to Transact Manager](#)

## Overview

Updating a form that has already been uploaded to a Transact Manager environment is a fairly common requirement. This requirement may be asked after customer feedback, or it may be due to continuous improvement processes within your company. Each time a form is updated in Maestro you will need to build the TM form version and upload the zip file to Transact Manager.

If you are using Transact Manager 5.0.6 or higher you have the option to use the method noted below, or you can use the *Update From Maestro* button in Transact Manager. See [Update TM Form Versions \(v5.0.6 or later\) \(Manager v5.1\)](#) for more information on using the *Update From Maestro* button.

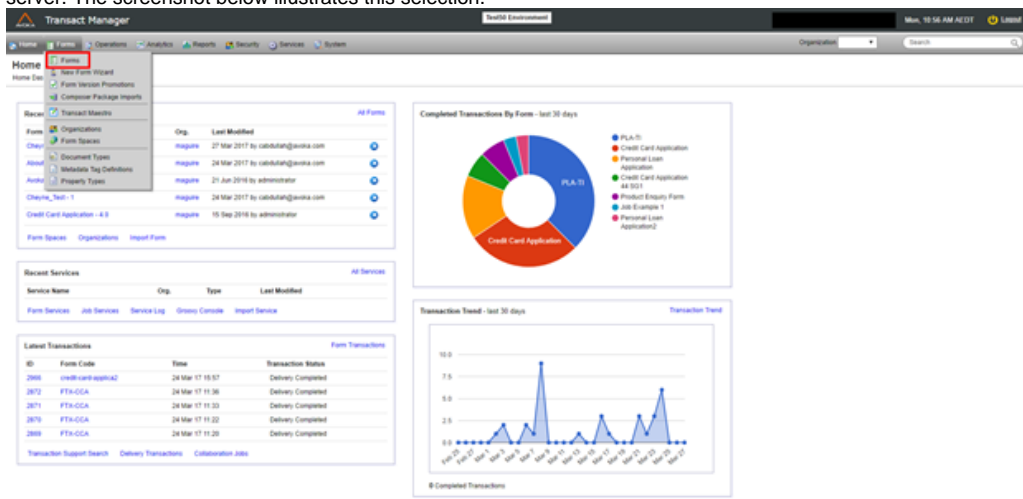
## Create TM Form Version

Once you have updated the form in Maestro, you need to build and download the TM form version. The process of building and downloading the TM form version is exactly the same as the process outlined in the [Build TM Form Version \(Manager v5.1\)](#) page of this documentation. View [Build TM Form Version \(Manager v5.1\)](#) for detailed steps on building the TM form version in Maestro.

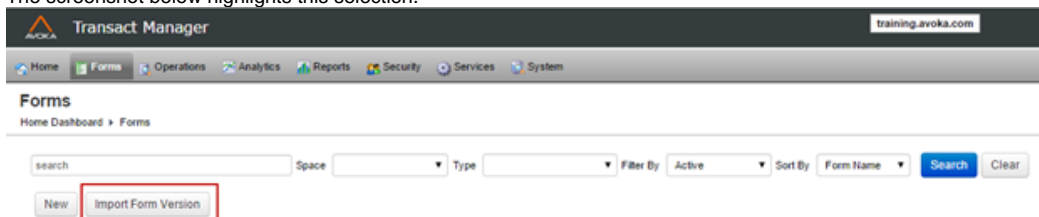
1. From the *Build* dropdown, select *Build and Download TM Form Version*. This will build the TM form version and download the zip file.

## Import the Zip File to Transact Manager

1. Navigate to the Transact Manager server that you wish to import the form into and log in. Logging in will redirect you to the *Home Dashboard*.
2. Select the *Forms* menu then click *Forms*. This selection will display the forms page. The forms page displays all forms uploaded to the TM server. The screenshot below illustrates this selection.



3. Select the *Import Form Version* button. The screenshot below highlights this selection.

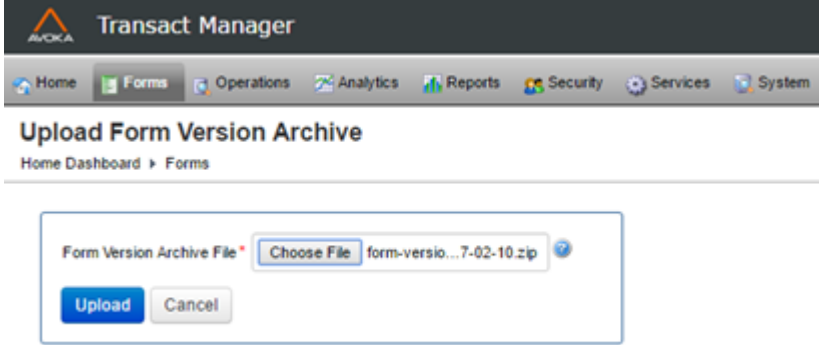


4. Select the *Choose File* button. Selecting this button will allow you to browse for and select the downloaded zip file. Once you

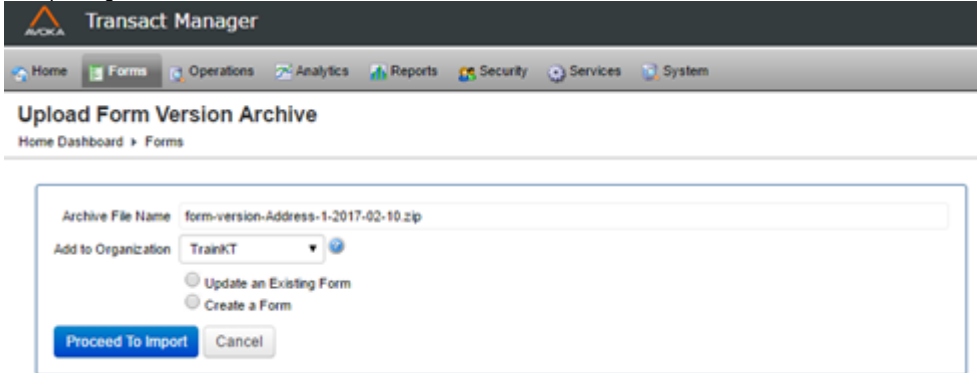
Error rendering macro  
'contentbylabel'

com.atlassian.renderer.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

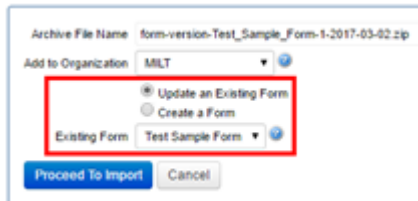
have selected the appropriate zip file, click *Upload*. The screenshot below illustrates these selections. Successful upload of the zip file will display the *Upload Form Version Archive* screen.



5. Select the appropriate organization (if relevant) for the form from the dropdown menu. Ensure that you select the SAME organization where you originally uploaded the form that you are updating.



6. Select *Update an Existing Form* from the available options.
  - a. *Update an Existing Form* – Selecting this option will display the *Existing Form* dropdown menu. From the dropdown menu, select the name of the form that you are updating and uploading to the TM server. As you are updating a form that has previously been uploaded to the Transact manager server, the name of the form will appear in the list of choices (if not included, check you have selected the correct organization from the *Add to Organization* dropdown). The screenshot below illustrates this option.



**i** Create a Form is used when you are importing a TM form version that has not already been imported into Transact Manager. Please see [Build TM Form Version \(Manager v5.1\)](#) for more information.

7. Click *Proceed to Import*  
Clicking this button will display the options screen for the form. It is on this page that you can select or unselect any options that you may want to override. Ensure that you select the option, *Make Current Version*, if you want to make the form that you are uploading the current version of

the form (i.e. the form that your form users will be completing). The screenshot below illustrates the options screen and highlights the *Make Current Version* option.

8. Click the *Import* button  
Selecting import will import the form into the TM server environment and display the summary screen. Note that if the *Create a New Form* option was selected during the import process, and there was a form naming conflict (i.e. a form with the same name already existing on the server), the form will be renamed, and a message will be displayed in the *Detail Message* tab. The screenshot below illustrates an example of a form name error message.

9. Select *Close*  
Selecting close will redirect you back to the forms page.

# Update TM Form Versions (v5.0.6 or later) (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

## Page Contents:

- [Overview](#)
- [Update TM Form Version](#)



This option is only available to environments using Transact Manager 5.0.6 or higher. For updating forms in prior Transact Manager versions please see [Update TM Form Versions \(Manager v5.1\)](#).

Error rendering macro  
'contentbylabel'

com.atlassian.rendererv2.macro.

MacroException: Error parsing 'sort' or

'reverse' parameter.

## Overview

Once a form has been uploaded and imported into a TM server, it is possible that the Maestro form will need to be updated. In previous versions of the Transact Manager, publishing an updated form to a TM server required form builders and TM administrators to repeat the entire process of building the TM form version and uploading it to the TM server (through the zip file). As of version 5.0.6 of Transact Manager, this is no longer the case, and a more streamlined approach to updating Maestro forms to TM has been implemented.

## Update TM Form Version

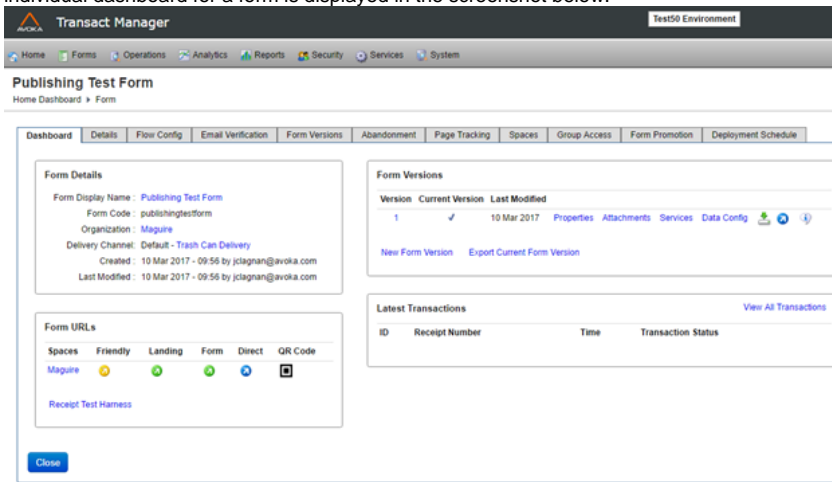
The steps below identify and describe the process of updating a Maestro form that has already been imported to a TM server (that is version 5.0.6 or higher).

1. Update the form in Maestro
2. Click the Build button to create the TM form version  
You can use any of the build options for this process, however clicking the *Build* button (not the dropdown) will build the TM form version without downloading or rendering the form in a new tab. This is the most relevant option for updating the form in Transact Manager, as you don't need to download the TM form version when using Transact Manager 5.0.6 or later.
3. Navigate to the TM server where you originally uploaded the zip file and login.
4. Select the *Forms* menu then click *Forms*.  
Selecting forms will direct you to the forms page and display a list of all the forms that have been uploaded to the TM server.

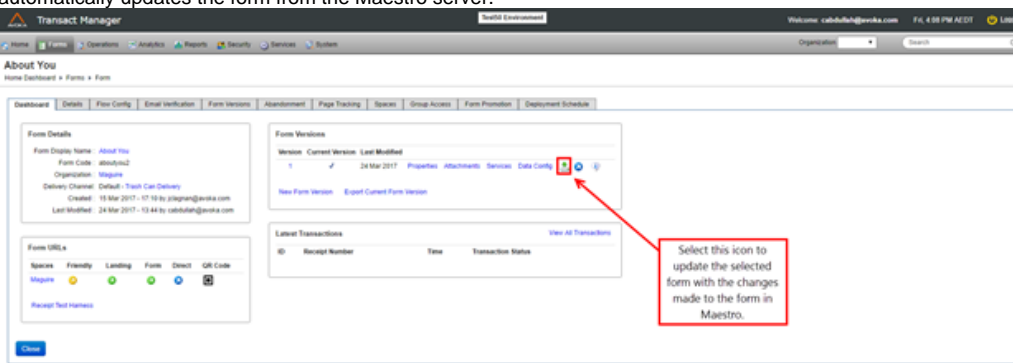
The screenshot shows the Transact Manager web interface. The 'Forms' menu is highlighted in the top navigation bar. Below the navigation bar, there is a sidebar with 'Home' and 'Recent Services' sections. The main content area displays a table of forms with columns for ID, Form Code, Time, and Transaction Status. The table lists several forms, including 'Credit Card Application' and 'Personal Loan Application'. To the right of the table, there are two charts: 'Completed Transactions By Form - last 30 days' (a donut chart) and 'Transaction Trend - last 30 days' (a line chart).

5. Select the form that you want to update (i.e. the form that you just updated in Maestro and had previously uploaded to the TM server).

Selecting the form will display an individual dashboard displaying information about the form. The individual dashboard for a form is displayed in the screenshot below.



6. Select the *Update from Maestro* icon next to the version you want to update. The screenshot below illustrates the icon and highlights this selection. Selecting this icon automatically updates the form from the Maestro server.



# View Maestro Forms in TM (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Overview of the Form Configuration Tabs \(Manager v17.10\)](#)
- [Overview of the Form Configuration Tabs \(Manager v5.1\)](#)
- [Remove a Form \(Manager v17.10\)](#)
- [Remove a Form \(Manager v5.1\)](#)
- [View Maestro Forms in TM \(Manager v17.10\)](#)
- [View Maestro Forms in TM \(Manager v5.1\)](#)

## Page Contents:

- [Overview](#)
- [Browse Forms](#)

## Overview

In Maestro, forms are designed and configured in terms of how they look and what they do. In Transact Manager, forms are configured in terms of the way that they behave at a system level. Forms are the central piece of the entire Transact Platform and Transact Manager can be used to configure them in several different ways.

Forms are presented to users by being hosted on a form space and can have multiple versions. When a form has multiple versions, one of them is acknowledged as the *Current Form Version* and is used when rendering the form. Though some data is common and shared by all versions of a form, most settings are configured and maintained individually by each version of the form. These pieces of version specific information can include property and metadata values.

## Browse Forms

Transact Manager allows you to view a list of all the forms associated with your instance of Transact Manager. You can filter this list by form space, the name of the form or the Form Code.

To browse the list of forms that are currently configured in your instance of Transact Manager, follow the steps below.

1. Select *Forms* from the menu bar.  
Selecting *Forms* will display the *Forms Menu*.
2. Select *Forms* from the *Forms Menu*.  
Selecting this option will display the list of Forms that are currently configured in your instance of Transact Manager. The screenshot below displays the list of Forms.

Form Name	Org.	Form Code	Current Version	Form Type	Release	Active	Test	Delivery Channel	Last Modified	Action
A B Testing Demo	mantaki	abtestingdemo	1	Maestro Form	5.1.0	✓			09 May 2017 by mantaki@avoka.com	
AB Testing Demo	mantaki	abtestingdemo2	1	Maestro Form	5.1.0	✓			09 May 2017 by mantaki@avoka.com	
Abandoned Submissions	AUMFG	abandonedsubmissions	1	Maestro Form	1.0.17	✓			23 Mar 2017 by terrylearner	
AL Vindex	Lusnia	alyindex	1	Maestro Form	1.0.22	✓			14 Apr 2017 by a.ejchman-lusnia@webellian.com	
Angle Bundle B	aok.amoto2	anglebundleb	1	Maestro Form	1.0.17	✓		Default : Trash	04 May 2017 by aokamoto@avoka.com	
Angle Expense Report	aok.amoto2	expenseareport	1	Maestro Form	1.0.17	✓		Default : Trash	26 Jan 2017 by aokamoto	
Angle Google Autofill	aok.amoto2	anglegoogleautofill	2	Maestro Form	1.0.17	✓		Default : Trash	27 Jan 2017 by aokamoto@avoka.com	
Anonymous Form Sharing	AUMFG	anonymousformsharin2	1	Maestro Form	1.0.17	✓			29 Mar 2017 by terrylearner	
Anonymous form sharing	Training	anonymousformsharin3	1	Maestro Form	1.0.17	✓			28 Mar 2017 by merrylearner	
Anonymous Form Sharing Exercise	cthomas	anonymousformsharin4	1	Maestro Form	5.1.0	✓			15 May 2017 by cthomas@avoka.com	
Anonymous Form Sharing Exercise	TMTRN-Online	anonymousformsharin3	1	Maestro Form	5.1.0	✓			08 May 2017 by jones	
Application	AUMFG	application	1	Maestro Form	1.0.17	✓	•	Training Email	20 Mar 2017 by terrylearner	
Application - Credit Card	AUMFG	applicationcreditcar	1	Maestro Form	1.0.17	✓			23 Mar 2017 by terrylearner	
Ari Bundle A	abarrera	aribundlea	2	Maestro Form	1.0.10	✓			27 Jan 2017 by ari.barrera@firsttechfed.com	
Ari Bundle B	abarrera	aribundleb	1	Maestro Form	1.0.10	✓			27 Jan 2017 by ari.barrera@firsttechfed.com	
Ari Google Autofill	abarrera	arigoogleautofill	2	Maestro Form	1.0.10	✓			27 Jan 2017 by ari.barrera@firsttechfed.com	
Attachment Begin	cthomas	attachmentbegin	1	Maestro Form	5.1.0	✓			15 May 2017 by cthomas@avoka.com	
Attachment Begin	TMTRN-Online	attachmentfinish	1	Maestro Form	5.1.0	✓			08 May 2017 by jones	
Attachment Finish	cthomas	attachmentfinish2	1	Maestro Form	5.1.0	✓			15 May 2017 by cthomas@avoka.com	
Attachments	AUMFG	attachments	1	Maestro Form	1.0.17	✓		Training Email	20 Mar 2017 by terrylearner	

You can filter the list of forms by Space, Form Type, Active/Inactive or Date Created/Modified. This page also allows you to edit existing forms () , delete existing forms () or export () existing forms.


# Overview of the Form Configuration Tabs (Manager v5.1)

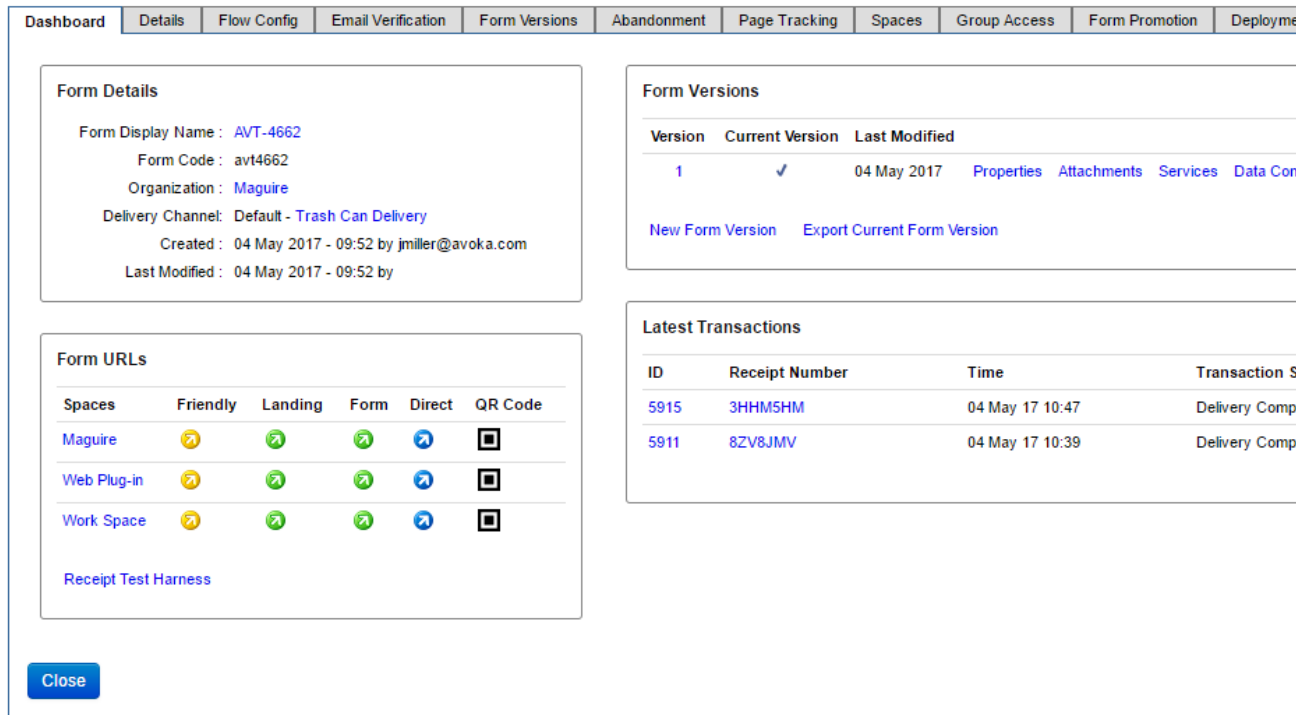
 Unknown macro: 'redirect'

## Overview of the Form Configuration Tabs

There are several reasons why you may want to edit a form. These reasons may include needing to assign a form to a new form space or needing to change the current details or configurations of a form.

To edit a Form in Transact Manager, follow the steps below.
















1. Select *Forms > Form Spaces* from the menu bar.
2. Select the form that you want to edit and click the edit () icon. Clicking this icon will direct you to the *Dashboard* of the selected form. The screenshot below displays the Dashboard for a sample form.  
Home Dashboard ▶ Form



**Form Details**


Form Display Name : [AVT-4662](#)  
Form Code : avt4662  
Organization : [Maguire](#)  
Delivery Channel: [Default - Trash Can Delivery](#)  
Created : 04 May 2017 - 09:52 by [jmiller@avoka.com](mailto:jmiller@avoka.com)  
Last Modified : 04 May 2017 - 09:52 by

**Form URLs**

Spaces	Friendly	Landing	Form	Direct	QR Code
<a href="#">Maguire</a>					
<a href="#">Web Plug-in</a>					
<a href="#">Work Space</a>					

[Receipt Test Harness](#)

**Form Versions**

Version	Current Version	Last Modified	
1		04 May 2017	<a href="#">Properties</a> <a href="#">Attachments</a> <a href="#">Services</a> <a href="#">Data Con</a>

[New Form Version](#) [Export Current Form Version](#)

**Latest Transactions**

ID	Receipt Number	Time	Transaction S
5915	3HHM5HM	04 May 17 10:47	Delivery Comp
5911	8ZV8JMV	04 May 17 10:39	Delivery Comp

[Close](#)

The *Dashboard* of a form displays an overview of the Form's configuration (its Details), as well as the latest transactions of the form and the different versions (if applicable) of the selected form.

# Assign Form Space to Form (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:


Error rendering macro  
'contentbylabel'

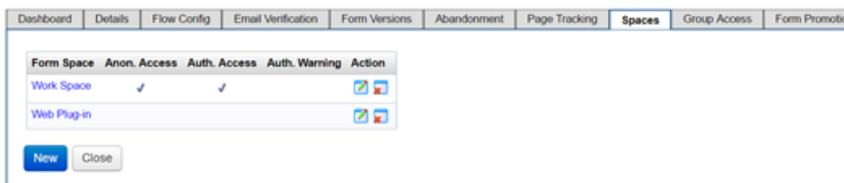
com.atlassian.render.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.



## Associate Forms with a Space (Manager v5.1)

### Associate Forms with a Space

The steps below document the process of associating a form with a form space. The spaces available to a form are determined by the spaces associated with the form's Organization.

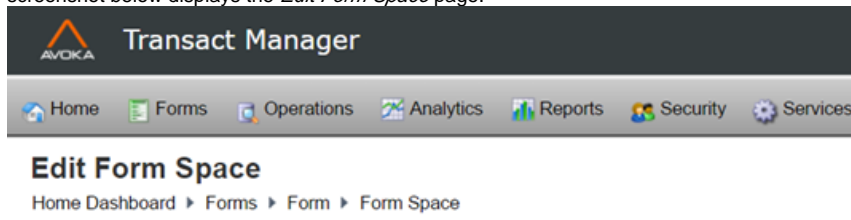
1. Select *Forms > Forms from the menu bar*.
2. Select the form that you want to associate with a space and click the edit (  ) icon. Clicking this icon will display the dashboard of the selected form.
3. Switch to the *Spaces* tab.  
Switching to this tab will display the list of spaces that are currently associated with the selected form. The screenshot below displays the list of spaces currently associated with the selected form.



Form Space	Anon. Access	Auth. Access	Auth. Warning	Action
Work Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	 
Web Plug-in	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 

 "Web Plug-in" is the default space used for TM form versions built in Maestro.

4. Click the *New* button. Clicking this button will direct you to the *Edit Form Space* page. The screenshot below displays the *Edit Form Space* page.



AVOKA Transact Manager

Home Forms Operations Analytics Reports Security Services

### Edit Form Space

Home Dashboard > Forms > Form > Form Space


Form Space: Work Space

Anonymous Access:

Authenticated Access:

Save Close

5. Use the *Form Space* dropdown menu to select the Form Space that you want to associate with the selected form.
6. Check 'Anonymous Access' if you want the form to be accessed by anonymous users
7. Check 'Authenticated Access' if you want to allow authenticated users to access the forms and tasks in the selected form space.
8. Click the *Save* button.

 You can check both 'Anonymous' and 'Authenticated' access. However, if the access authorized at the space level is different to that set at a form level, then the following column will be added to the list of forms that are configured for the selected space.

**Auth. Warning**



# Property Types (Manager v5.1)



## Related Pages:

- [Add a Property Type \(Manager v17.10\)](#)
- [Add a Property Type \(Manager v5.1\)](#)
- [Property Types \(Manager v17.10\)](#)
- [Property Types \(Manager v5.1\)](#)

## Page Contents:

- [Property Types](#)
- [Available Data Types for a Property](#)
- [Browse the List of Property Types](#)

## Property Types

Properties are crucial to the pre-population of data into a form. Properties are used to configure all sorts of attributes of both organizations and forms. These attributes may include branding, links to related resources, contact details and pieces of help text.

These properties are based on certain property types that are defined for all configurations of a certain scope (Organization, Form or User). Each of these property types can be assigned a value for each entity.

The following section documents the process of managing property types and describes the process of assigning property values to forms and organizations.

## Available Data Types for a Property

To help restrict property values that a user can set up, properties can have one of several different data types.

The list below identifies and describes each of the data types that are available to property types that Transact Manager offers.

- **Boolean** – A Boolean Data Type only accepts the values "true" or "false". A common example of a Boolean Property Type is a yes/no question.
- **HTML** – A HTML Data Type only accepts and displays HTML files. An example of an HTML property type is an email message.
- **Image** – An image Data Type accepts images of type PNG, GIF, and JPG. Images can be uploaded to the server when assigning a value to the property. A common example of an image property type is a company logo.
- **JSON** – A JSON Data type only accepts JSON files. An example of a JSON property type is a script to dynamically display a set of colors.
- **List** – A list Data Type is used to populate values in lists of a form. This means that list properties can have several property values assigned to them, all of which will be passed into the form when requested by the form user. A common example is a list of names.
- **Long Text** – A Long Text Data Type accepts a text file with HTML-style formatting, with no length restrictions. Long text files can be uploaded to the server when assigning a value to the property. A common example is the Terms and Conditions of a form.
- **Number** – A Number Data Type accepts only numeric characters (0-9, etc.). A common example is an ABN number.
- **String** – A String Data Type Accepts an arbitrary string. A common example is the name of a Country.

If you choose a data type that restricts certain values (eg Number), administrators will be prevented from entering unacceptable values. This helps to avoid errors caused by invalid data being passed to a form.

## Browse the List of Property Types

Transact Manager allows administrators to view the list of properties that have been configured in Transact Manager. Follow the steps below to view this list of properties.

1. Select *Forms* from the menu bar
2. Select *Property Types*.  
Selecting this option will display the current list of configured property types.

The screenshot below displays a list of property types currently configured in an instance of Transact Manager.

Transact Manager

Home Forms Operations Analytics Reports Security Services System

### Property Types

Home Dashboard > Property Types

search Scope Search Clear

New

Property Name	Org.	Scope	Data Type	Description	Action
Form Terms And Conditions	Client	Form	HTML	The form Terms and Conditions statement the user must accept before accessing the form.	
Form Terms And Conditions	Form	Form	HTML	The form Terms and Conditions statement the user must accept before accessing the form.	
Given Name	User	User	String	First or given name	
HTML Confirmation Page	Form	Form	HTML	HTML submission confirmation page template	
HTML Landing Page	Form	Form	HTML	HTML form landing page template	
HTML Saved Page	Form	Form	HTML	HTML form saved page template	
HTML Terms And Conditions Page	Form	Form	HTML	HTML form Terms and Conditions page template	
Job Description	Form	Form	String	The Job display description	
Job Name	Form	Form	String	The Job display name	
Logo	Client	Client	Image	Organization Logo Image	
Max Save Challenge Requests	Form	Form	Number	The maximum number of invalid save challenge requests that a user can make before being blocked.	
Mobile	User	User	String	Mobile number	
Offline Status Message	Form	Form	String	Form specific message to be displayed when form is requested while the portal is in offline mode	
Payment Certificate File	Client	Client	String	The location of the certificate file used during payment gateway transactions.	
Payment Merchant Password	Form	Form	String	Can be used on a form level to override the Payment Merchant password.	
Payment Merchant User	Form	Form	String	Can be used on a form level to override the Payment Merchant.	
Save Challenge Question	Form	Form	String	The security question an anonymous user must answer before being able to access a saved form.	
Saved Message	Form	Form	String	The message displayed to users after saving a form online	
Servers Busy Message	Form	Form	String	Form specific message to be displayed when all form servers are busy.	
Submission Duplicate Message	Form	Form	String	Error message to display when a duplicate submission is rejected	

21-40 of 42 [Export Data](#)

### Filter the Property List

To search the property list, you can apply a filter to the list by using a substring of a property name, and identifying the scope ("Organization", "Form" or "User") and data type (see the following section) that you are searching for. Once you have applied your filter, there is an option to export the results to Excel by clicking the *Export Data* button located directly below the table (You can also export the entire property list without applying a filter).

# Add a Property Type (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Add a Property Type \(Manager v17.10\)](#)
- [Add a Property Type \(Manager v5.1\)](#)
- [Property Types \(Manager v17.10\)](#)
- [Property Types \(Manager v5.1\)](#)

## Add a Property Type

To add a new property type, follow the steps below.

1. Select *Forms > Property Types* from the menu bar. Selecting this option will display the current list of set up properties.
2. Select *New*. Selecting *New* will redirect you to the 'Edit Property Type' page. The screenshot below displays the 'Edit Property Type' page.

**Edit Property Type**  
Home Dashboard > Property Types > Property Type

Name \* Support Email Address

Description

Organization

Scope \* Client

Data Type \* String

Read Only

Save Close


## Add Basic Data when Adding a Property Type

Once you have been directed to the 'Edit Property type' screen, Follow the steps below to complete the mandatory fields required to add data to the property type that you are adding to Transact Manager.

1. Provide the property type with a unique name and (optionally) a description.
2. Select the Organization that you want the property type to belong to. If left blank, the property type will belong to all Organizations associated with your instance of Transact Manager. If you select an Organization for the property type to belong to, Organization administrators of other Organizations will not be able to see the property type.
3. Set the Scope of the property (either "Organization", "Form", or "User"). The scope for the property will depend on how you plan to use the property type.
4. Select the appropriate *Data Type* for the property type (the available data types are identified and described below).
5. Check *Read Only* if you do not want the property type to be able to be modified.
6. Select *Save*

Once you have saved the property type, you can now assign values to it, but until you map the property type to a location in a form's data configuration.

# Form Version Property Types (Manager v5.1)


 Unknown macro: 'redirect'

The content within this section covers information relating to property types for form versions in Transact Manager.

Below you will find a list of topics within this section.

- [Manage Form Version Properties \(Manager v5.1\)](#)
- [Create a Form Version Property \(Manager v5.1\)](#)
- [Modify a Form Version Property \(Manager v5.1\)](#)

# Manage Form Version Properties (Manager v5.1)





## Related Pages:

- [Collaboration Job Information for a Form Version \(Manager v5.1\)](#)
- [Create a Form Version Property \(Manager v5.1\)](#)
- [Custom Services for a Form Version \(Manager v5.1\)](#)
- [Delete a Form Version \(Manager v17.10\)](#)
- [Delete a Form Version \(Manager v5.1\)](#)
- [Export a Form Version \(Manager v17.10\)](#)
- [Export a Form Version \(Manager v5.1\)](#)
- [Form Version Categories \(Manager v5.1\)](#)
- [Manage Form Version Properties \(Manager v5.1\)](#)
- [Manage Form Versions \(Manager v5.1\)](#)

## Page Contents:

- [Overview](#)
- [View a List of Form Version Properties](#)

## Overview

Properties in Transact Manager offer a sophisticated mechanism for:

- Defining common reusable elements, like the layout and content of a specific email message including any required dynamic data such as user and/or form details.
- Defining custom and reusable elements that are specifically defined to suit your enterprise's requirements. In this case, custom code would be created to make use of these elements.




Properties are for the most part used for prefilling data for forms dynamically. The benefit of this is that changes in some aspect need not result in form changes. Some behaviors may also be controlled by using properties. For instance,

When creating a form space, Transact Manager will create a standard set of properties for your form space. These are already prefilled with default values.

These default properties may be overridden at different levels, such as for an organization's forms or for a specific form version. A form version override is achieved by creating a form version property.

## View a List of Form Version Properties

To view a list of form version properties for your form, do as follows:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the *Form Version* column or its edit icon (  ) under the *Action* column.
5. Switch to the *Properties* tab.
6. From here you may:
  - a. Create a new form version property (click on *New* button).
  - b. Modify an existing form version property (click on property name under the *Name* column or on the edit icon (  ) under the *Action* column).
  - c. Delete an existing form version property (click on the delete icon (  ) under the *Action* column).
  - d. Synchronize a form version with the organization properties (click on *Sync Org Properties* button).

# Create a Form Version Property (Manager v5.1)


Unknown macro: 'redirect'

Related Pages:

## Create a Form Version Property

To create form version properties:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the Form Version column or

the edit (  ) icon under the *Action* column.

5. Switch to the *Properties* tab.
6. Click the *New* button.
7. Select the *Property Type* dropdown

This will populate the *Name*, *Data Type*, and (depending on the property type) the *Value*.

- a. *Name* is populated based on the selected *Property Type*. This can only be modified when it does not relate to a *Property Type* (the dropdown is left blank).
  - b. *Property Type* can be left blank when no suitable type can be found in the dropdown list. Alternatively, you may also first add a new property type and then use it here. For more information on creating new property types, please refer to the [Add a Property Type \(Manager v5.1\)](#) section.
  - c. The *Data Type* dropdown will be populated depending on the property type you select. You will need to select an appropriate data type from the dropdown when the *Property Type* was left blank.
  - d. The *Value* will be populated based on the property type you selected. For your form version to override this property, alter the *Value* as required. Please note, not all property types contain a default value.
8. Click the *Save* button.

Form version properties offer flexibility and control as a means of overriding existing definitions.

To demonstrate this, you may decide to customize the form receipt email message by overriding the default *Email Form Receipt Message* property as was initially set up for the form space. The form space property, *Email Form Receipt Message*, is displayed in the following screenshot. For more information on properties, please refer to the [Form Spaces \(Manager v5.1\)](#), [Organization Configuration \(Manager v5.1\)](#), and [Property Types \(Manager v5.1\)](#) sections.

### Work Space - Property Email Form Receipt Message

Home Dashboard > Form Spaces > Module > Portal Property

```
Name Email Form Receipt Message
1 <p> Thank you for submitting ${form.formname} at ${portal.name}. </p>
2 <p> Your form reference code is: <b> ${submission.trackingCode} </b> </p>
3 #if ($hasReceiptAttachment)
4 <p> Please see the attached PDF for a copy of your form submission. </p>
5 #end
6 #if ($hasReceiptLink)
7 <p> To access your PDF receipt please: </p>
8 <p> 1. &nbsp;nbsp; Copy the URL below into a web browser: </p>
9 <p> <b style="color:blue;"> ${receiptURL} </b> </p>
10 <p> 2. &nbsp; Enter in your Reference Code: <b> ${submission.trackingCode} </b> </p>
11 #end
12 #if ($jobTasks && !$jobTasks.isEmpty())
13 <h3>Next Steps</h3>
14 <p> You are required to complete these additional forms to finalize your request. </p>
15 <ul>
16 #foreach ($task in $jobTasks)
17 <li>
18 #if ($task.isJobFormEditable() || !$task.isFormCompleted())
19 #if ($task.taskSubject)
20 <a href="${task.portal.contextPath}form.html?submitkey=${task.submitkey}">${task.taskSubject}</a> #if($task.isFormCompleted())- (Completed) #end
21 #else
22 <a href="${task.portal.contextPath}form.html?submitkey=${task.submitkey}">${task.formname}</a> #if($task.isFormCompleted())- (Completed) #end
23 #end
24 #else
25 #if ($task.taskSubject)
26 <li>${task.taskSubject} - (Completed)
27 #else
28 <li>${task.formname} - (Completed)
29 #end
30 #end
31 </ul>
32 #end
33 </ul>
34 #end
35 <!-- ${environmentName} -->
```

A possible requirement to customize the above email message for your form version may be to add some contact details.

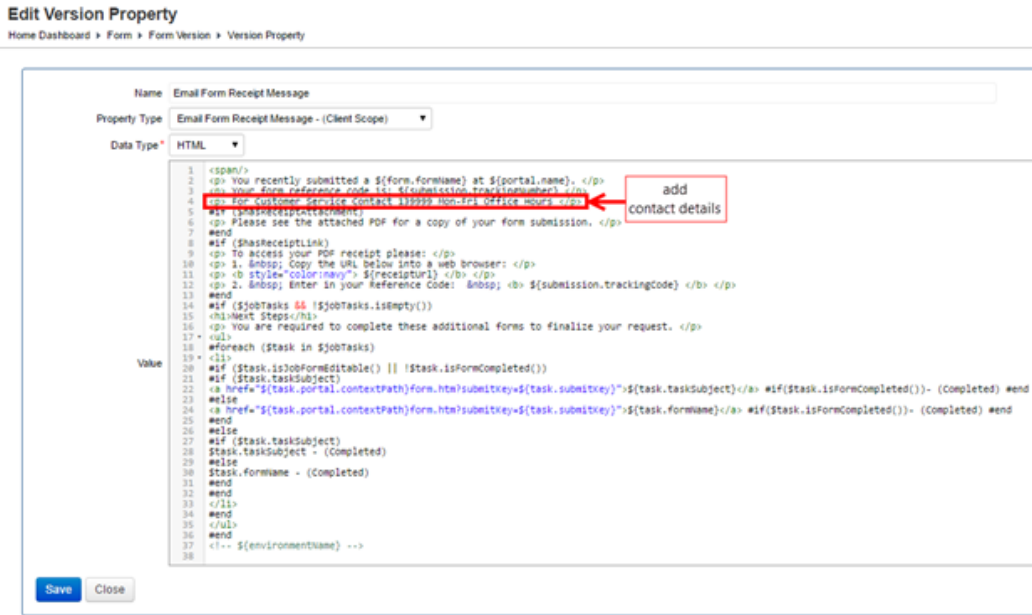
Follow steps 1-6 above, followed by:

1. Select the *Email Form Receipt Message* from the *Property Type* dropdown.

Error rendering macro  
'contentbylabel'

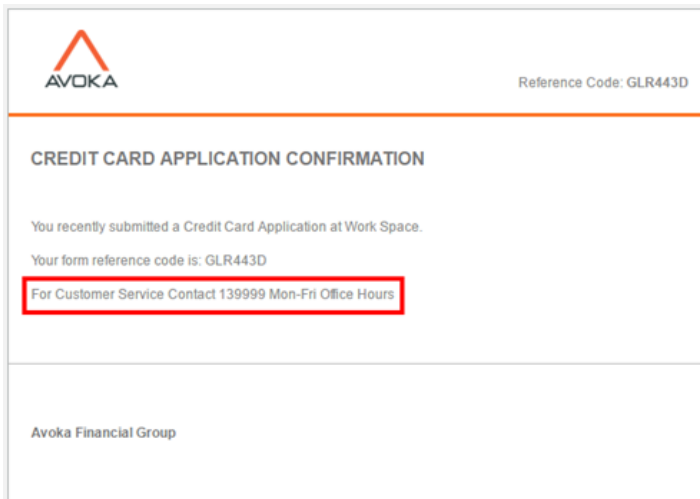
com.atlassian.renderers.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

- Change the *Value* field as shown in the screenshot below. Notice that, as dictated by the *Data Type*, you will need to observe and retain the HTML format for the message.



- Click the *Save* button.

Now when a form user submits this form, the email message he/she receives will include the above inserted contact details (see the following screenshot). However, this override will not affect the email receipt messages for any other form.



For information about creating and using custom properties, please refer to the [Property Types \(Manager v5.1\)](#) section of this documentation.

# Modify a Form Version Property (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

## Page Contents:

- [Modify a Form Version Property](#)
  - [Example of Modifying the Form Description Property](#)
- [Synchronize Form Version with Organization Properties](#)
- [Delete a Form Version Property](#)

## Modify a Form Version Property

Another example for using form version properties is with the form description. To assist the user in choosing the correct form, the form description is displayed in the list of forms a user can view in the form space, as well as, on the form's landing page.

A form version property, *Form Description*, exists that is by default blank. It is advisable to update this with a suitable description.

## Example of Modifying the Form Description Property

The following are the steps for modifying the form description property:

1. From your list of form version properties, click the *Form Description* under the *Name* column (or click the *Edit* icon under the *Action* column).
2. Enter a suitable description for your form in the *Value* field.
3. Click the *Save* button.

The screenshot below displays the *Edit Version Property* page.

### Edit Version Property

Home Dashboard > Form > Form Version > Version Property

The screenshot shows a web form titled "Edit Version Property". At the top, there is a breadcrumb trail: "Home Dashboard > Form > Form Version > Version Property". The form itself has a "Name" field containing "Form Description". Below that is a "Property Type" dropdown menu set to "Form Description - (Form Scope)". The main part of the form is a "Value" field containing the text "1 Your Credit Card Application". At the bottom of the form, there are two buttons: "Save" and "Close".

The screenshot below displays the list of forms in the form space, with the form description that was entered in the form version property:

The screenshot shows the "Forms" page in the AVOKA system. At the top left is the AVOKA logo. A navigation menu is visible with tabs for "Home", "Forms" (which is highlighted in orange), "Tasks", "History", "Reviews", and "Help Desk". Below the menu, the heading "Forms" is displayed, followed by the text "Select from the list of available forms below." There is a search bar with the placeholder text "Search" and a "Go" button. Below the search bar, there is a list of forms. The first form is "Credit Card Application", which is expanded to show "Your Credit Card Application". This text is highlighted with a red rectangular box.

And this screenshot displays the form's landing page, with the form description that was entered in the form version property:

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.

v2.macro.

MacroException: Error

parsing 'sort' or

'reverse' parameter.

## Credit Card Application

Your Credit Card Application

Open New Form

Powered By Avoka Transact

### Synchronize Form Version with Organization Properties


At times, you may need to refresh the properties configured for your form version to be synchronized with the values configured for the organization. This is possible but proceed with care as there is no ability to undo this action.

When *Sync Org Properties* is clicked, Transact Manager will refresh all your form version properties customized where:

- The *Property Scope* is *Client*.
- There exists a customized property of the same name for the organization (of the form).



Before proceeding with the Sync Org Properties, it's advisable that you back it up by exporting the form version (refer to [Export a Form Version \(Manager v5.1\)](#) section).

To synchronize form version with organization properties for your form:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the *Form Version* column or the *Edit icon* () under the *Action* column.
5. Switch to the *Properties* tab.
6. Click the *Sync Org Properties* button.

### Delete a Form Version Property

It may be necessary to delete a form version property as follows:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the *Form Version* column or the *Edit icon* () under the *Action* column.
5. Switch to the *Properties* tab.
6. Find the form version property you wish to delete and click the *Delete icon* () under the *Action* column.
7. Confirm the deletion of the form version property by clicking *OK* from the confirmation dialog.

# Remove a Form (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Overview of the Form Configuration Tabs \(Manager v17.10\)](#)
- [Overview of the Form Configuration Tabs \(Manager v5.1\)](#)
- [Remove a Form \(Manager v17.10\)](#)
- [Remove a Form \(Manager v5.1\)](#)
- [View Maestro Forms in TM \(Manager v17.10\)](#)
- [View Maestro Forms in TM \(Manager v5.1\)](#)

## Remove a Form

The decision to delete a form should not be taken lightly, as the deletion of even a single form can have an effect on many form users. When possible, it is recommended that forms should be made inactive rather than be deleted. This is sometimes referred to as a soft delete.

To make a form inactive:


1. Select *Forms > Form Spaces* from the menu bar.
2. Select the form that you want to make inactive and click the *Edit* icon. Clicking the edit icon will direct you to the Dashboard of the selected Form.
3. Navigate to the *Details* tab and unselect the *Active* checkbox. The screenshot below highlights the *Active* checkbox.

Home Dashboard > About > Form


The screenshot shows the 'Details' tab of a form configuration page. The form is identified as AVT-4662. The 'Active' checkbox is checked and highlighted with a red box. Other fields include Form Code (avt4662), Ref Form ID, Form Manager, Transaction Value, Transact Insights, Log Form XML, Test Mode, Form Version Selector, Submission Expiry Date, Submission Expiry Days, Tracking Code / Receipt Numbers, Delivery Channels, and Transaction Data Retention Policies.

4. Click *Save*.

If you wish to delete a form, be aware that deleting a form will delete all form versions and submissions of the form. To delete a form:

1. Navigate to *Forms* in the menu bar and then select *Forms* from the *Forms Menu*.
2. Find the form that you want to delete and click the *Delete* icon .
3. Confirm your decision by selecting *OK* from the pop-up dialog box that will appear once you click *Delete*.

# Working with Maestro Form Versions (Manager v5.1)

 Unknown macro: 'redirect'

The content within this section covers information relating to configuring form versions in Transact Manager.

Below you will find a list of topics within this section.

- [Manage Form Versions \(Manager v5.1\)](#)
- [Version Property Types \(Manager v5.1\)](#)
- [Custom Services for a Form Version \(Manager v5.1\)](#)
- [Form Version Categories \(Manager v5.1\)](#)
- [Collaboration Job Information for a Form Version \(Manager v5.1\)](#)

# Manage Form Versions (Manager v5.1)



## Overview

Transact Manager offers a flexible mechanism to preserve multiple versions of a form allowing users to easily switch between versions. This allows controlled releases of new versions as well as the ability to roll back a release if needed. When developing and deploying forms, occasionally challenges will arise that necessitate the need to revert back to a previous version of a form.

The [Form A/B Testing \(Manager v5.1\)](#) feature in Transact Manager also necessitates form versions.

## Manage Form Versions

Form versions are predominately created in Maestro. When a new form version is built/published, it is transferred across as a new form version in Transact Manager. This approach to creating new form versions is recommended as it is more manageable and easier to keep the form versions in sync across Maestro and Transact Manager.

It is not possible to create and maintain form versions in Composer. Instead, Composer users may choose to import the Composer package (the published form) as a new version of the form.

## Navigate to Form Versions

Form versions in Transact Manager can be managed by navigating to the form versions section of a form in several different ways.







## View a List of Form Versions

To view the list of all form versions that have been set up for a specified form:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Versions* tab.
4. A list of all form versions for the specified form are displayed with the following details:
  - a. *Form Version* - the version number of the form (highest number is for the most recent).
  - b. *Current Version* - the ticked version is the current version. To nominate another version to be the current version, click the version's *Make Current* link.
  - c. *Form Type* - will identify how the form was created. The different form types are:









Form Type	Description
Composer SmartForm	Composer FAR file (created when you use 'Publish as zip file' option in Composer)
Maestro Form	Maestro file (created when you download a form version after publishing).

- d. *Release* - will identify which release of Maestro/Composer the form version was published or built from.
- e. *Form Template(s)* identifies the template of the form Maestro/Composer forms are *HTML Desktop*.
- f. *Receipt Template* (if exists) identifies the receipt template.
- g. *Signature Template* (if exists) identifies the signature template.
- h. *Last Modified* - identifies who and when the form version was last modified
- i. *Action* – the following action options are available.

Icon	Action for the Form Version
	View and/or change (same as clicking on the number in the <i>Version</i> column)
	View and/or change the data configuration (refer to the <a href="#">View Maestro Forms in TM (Manager v5.1)</a> section for more on form data configurations)
	Download (the form template file)
	Render the form version in a new web browser tab
	Export and download the form version archive file
	Delete (you may not delete the current form version)

## Credit Card Application

Home Dashboard > Form

Form Version	Current Version	Form Type	Release	Form Template(s)	Receipt Template	Signature Template	Last Modified	Action
2	✓	Maestro Form	5.1.0	HTML Desktop			06 Jun 2017 by asmith	   
1	<a href="#">Make Current</a>	Maestro Form	5.1.0	HTML Desktop			05 Jun 2017 by asmith	   

[New](#) [Close](#)

### Assign a Different Form Version as the Current

The current form version is the form version which is rendered to the user when the form is requested. Although this is not always the case when form A/B testing is turned on. Please refer to the [Form A/B Testing \(Manager v5.1\)](#) section for more information.

To navigate to your form's *Form Versions* tab:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.  
The current version is the version that is listed with a tick in the *Current Version* column of the table. To assign a different form version to be the current:
4. Click the *Make Current* link for the form version you wish to assign as the current.

This may also be done in the same way from the *Form Dashboard* tab in the *Form Versions* section.

# Export a Form Version (Manager v5.1)



## Related Pages:


- [Collaboration Job Information for a Form Version \(Manager v5.1\)](#)
- [Create a Form Version Property \(Manager v5.1\)](#)
- [Custom Services for a Form Version \(Manager v5.1\)](#)
- [Delete a Form Version \(Manager v17.10\)](#)
- [Delete a Form Version \(Manager v5.1\)](#)
- [Export a Form Version \(Manager v17.10\)](#)
- [Export a Form Version \(Manager v5.1\)](#)
- [Form Version Categories \(Manager v5.1\)](#)
- [Manage Form Version Properties \(Manager v5.1\)](#)
- [Manage Form Versions \(Manager v5.1\)](#)

## Export a Form Version

It is possible to export a specific form version when necessary. Some reasons for exporting a form version may be:

- To migrate a single form version to your Transact Manager production environment, as either a new or updated form version.
- To back up your form version.

To export a form version:

1. Select *Forms* from the menu bar, and then select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. From the *Action* column, click the *Export icon* () of the form version you wish to export.
5. Click the *OK* button to confirm your decision.

# Delete a Form Version (Manager v5.1)

 Unknown macro: 'redirect'

Related Pages:

## Delete a Form Version


Before deleting a form version, please consider if it is necessary to do so. When you delete a form version, all its related entities including submissions are also deleted.

Instead, you may wish to:

- Leave the form version and assign another form version as the current version.
- Retire the entire form by deactivating it. Please refer to [Remove a Form \(Manager v5.1\)](#) in the *Form Configuration Options* section.

Also, you may delete any form version except the current one. If only one form version exists, you will not be able to delete it until you first create a new form version for your form.

To delete a form version:

1. Select *Forms* from the menu bar, and then select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Check to see if the form version you wish to delete is the current form version (*Current Version* column is ticked). If it is, reassign the correct form version as the current form version by clicking on its *Make Current* link).
5. From the *Action* column, click the *Delete icon* () of the form version you wish to delete.
6. Click the *OK* button to confirm your decision.

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.


v2.macro.

MacroException: Error

parsing 'sort' or

'reverse' parameter.

# Version Property Types (Manager v5.1)

 Unknown macro: 'redirect'

The content within this section covers information relating to property types for form versions in Transact Manager.

Below you will find a list of topics within this section.

- [Manage Form Version Properties \(Manager v5.1\)](#)
- [Create a Form Version Property \(Manager v5.1\)](#)
- [Modify a Form Version Property \(Manager v5.1\)](#)

# Form Version Properties (Manager v5.1)





## Page Contents:

- [Overview](#)
- [View a List of Form Version Properties](#)

## Overview

Properties in Transact Manager offer a sophisticated mechanism for:

- Defining common reusable elements, like the layout and content of a specific email message including any required dynamic data such as user and/or form details.
- Defining custom and reusable elements that are specifically defined to suit your enterprise's requirements. In this case, custom code would be created to make use of these elements.




Properties are for the most part used for prefilling data for forms dynamically. The benefit of this is that changes in some aspect need not result in form changes. Some behaviors may also be controlled by using properties. For instance,

When creating a form space, Transact Manager will create a standard set of properties for your form space. These are already prefilled with default values.

These default properties may be overridden at different levels, such as for an organization's forms or for a specific form version. A form version override is achieved by creating a form version property.

## View a List of Form Version Properties

To view a list of form version properties for your form, do as follows:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the *Form Version* column or its edit icon (  ) under the *Action* column.
5. Switch to the *Properties* tab.
6. From here you may:
  - a. Create a new form version property (click on *New* button).
  - b. Modify an existing form version property (click on property name under the *Name* column or on the edit icon (  ) under the *Action* column).
  - c. Delete an existing form version property (click on the delete icon (  ) under the *Action* column).
  - d. Synchronize a form version with the organization properties (click on *Sync Org Properties* button).

## Related Pages:

- [Collaboration Job Information for a Form Version \(Manager v5.1\)](#)
- [Create a Form Version Property \(Manager v5.1\)](#)
- [Custom Services for a Form Version \(Manager v5.1\)](#)
- [Delete a Form Version \(Manager v17.10\)](#)
- [Delete a Form Version \(Manager v5.1\)](#)
- [Export a Form Version \(Manager v17.10\)](#)
- [Export a Form Version \(Manager v5.1\)](#)
- [Form Version Categories \(Manager v5.1\)](#)
- [Manage Form Version Properties \(Manager v5.1\)](#)
- [Manage Form Versions \(Manager v5.1\)](#)

# Create a Version Property (Manager v5.1)

Unknown macro: 'redirect'


Related Pages:

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

## Create a Form Version Property

To create form version properties:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the Form Version column or the edit (  ) icon under the *Action* column.
5. Switch to the *Properties* tab.
6. Click the *New* button.
7. Select the *Property Type* dropdown
  - This will populate the *Name*, *Data Type*, and (depending on the property type) the *Value*.
    - a. *Name* is populated based on the selected *Property Type*. This can only be modified when it does not relate to a *Property Type* (the dropdown is left blank).
    - b. *Property Type* can be left blank when no suitable type can be found in the dropdown list. Alternatively, you may also first add a new property type and then use it here. For more information on creating new property types, please refer to the [Add a Property Type \(Manager v5.1\)](#) section.
    - c. The *Data Type* dropdown will be populated depending on the property type you select. You will need to select an appropriate data type from the dropdown when the *Property Type* was left blank.
    - d. The *Value* will be populated based on the property type you selected. For your form version to override this property, alter the *Value* as required. Please note, not all property types contain a default value.
8. Click the *Save* button.

Form version properties offer flexibility and control as a means of overriding existing definitions.

To demonstrate this, you may decide to customize the form receipt email message by overriding the default *Email Form Receipt Message* property as was initially set up for the form space. The form space property, *Email Form Receipt Message*, is displayed in the following screenshot. For more information on properties, please refer to the [Form Spaces \(Manager v5.1\)](#), [Organization Configuration \(Manager v5.1\)](#), and [Property Types \(Manager v5.1\)](#) sections.

### Work Space - Property Email Form Receipt Message

Home Dashboard > Form Spaces > Module > Portal Property

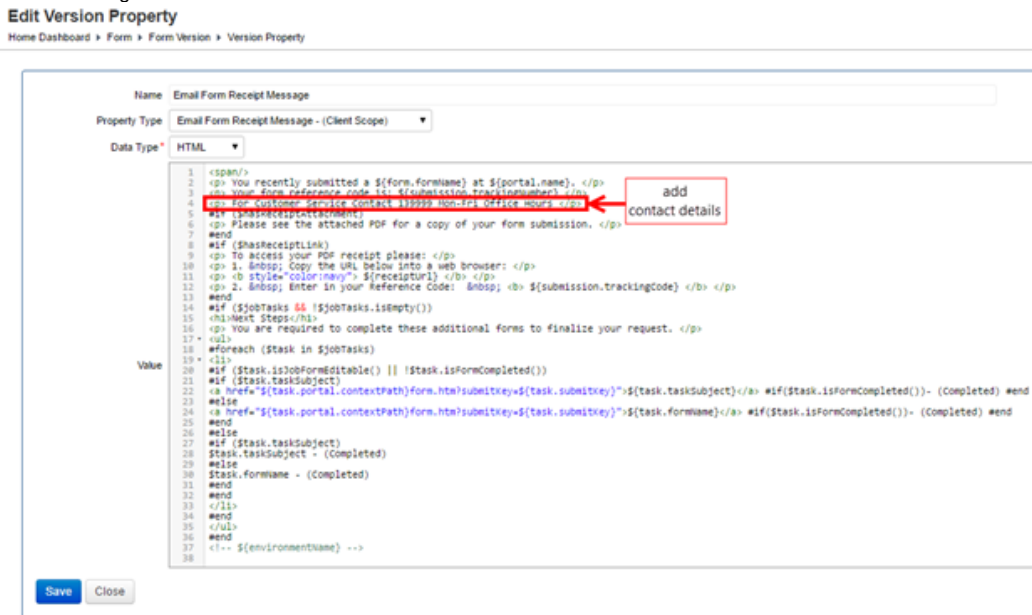
```
Name Email Form Receipt Message
1 <p> Thank you for submitting ${form.formname} at ${portal.name}. </p>
2 <p> Your form reference code is: <b> ${submission.trackingcode} </b> </p>
3 #if ($hasReceiptAttachment)
4 <p> Please see the attached PDF for a copy of your form submission. </p>
5 #end
6 #if ($hasReceiptLink)
7 <p> To access your PDF receipt please: </p>
8 <p> 1. &nbsp; Copy the URL below into a web browser: </p>
9 <p> <b style="color:blue"> ${receipturl} </b> </p>
10 <p> 2. &nbsp; Enter in your Reference Code: <b> ${submission.trackingcode} </b> </p>
11 #end
12 #if ($jobtasks && !$jobtasks.isEmpty())
13 <h4>Next Steps</h4>
14 <p> You are required to complete these additional forms to finalize your request. </p>
15 <ul>
16 #foreach ($task in $jobtasks)
17 <li>
18 #if ($task.isJobFormEditable() || !$task.isFormCompleted())
19 #if ($task.taskSubject)
20 <a href="${task.portal.contextPath}form.html?submitkey=${task.submitkey}">${task.taskSubject}</a> #if($task.isFormCompleted())- (Completed) #end
21 #else
22 <a href="${task.portal.contextPath}form.html?submitkey=${task.submitkey}">${task.formname}</a> #if($task.isFormCompleted())- (Completed) #end
23 #end
24 #else
25 #if ($task.taskSubject)
26 <code>${task.taskSubject} - (Completed)</code>
27 #else
28 <code>${task.formname} - (Completed)</code>
29 #end
30 #end
31 </li>
32 #end
33 </ul>
34 #end
35 <!-- ${environmentname} -->
```

A possible requirement to customize the above email message for your form version may be to add some contact details.

Follow steps 1-6 above, followed by:

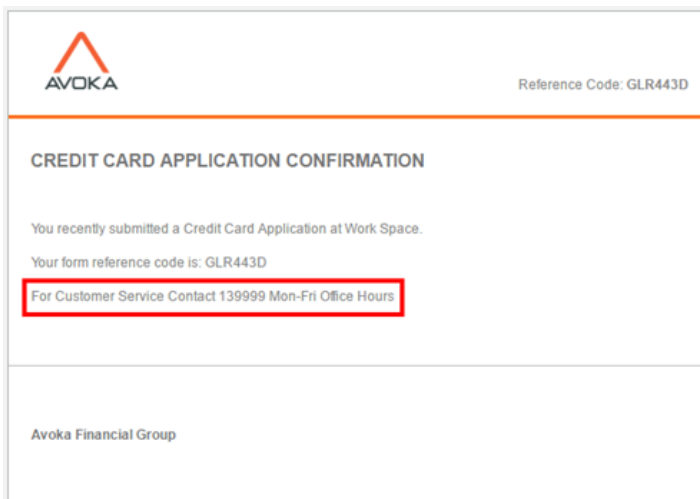
1. Select the *Email Form Receipt Message* from the *Property Type* dropdown.

- Change the *Value* field as shown in the screenshot below. Notice that, as dictated by the *Data Type*, you will need to observe and retain the HTML format for the message.



- Click the *Save* button.

Now when a form user submits this form, the email message he/she receives will include the above inserted contact details (see the following screenshot). However, this override will not affect the email receipt messages for any other form.



For information about creating and using custom properties, please refer to the [Property Types \(Manager v5.1\)](#) section of this documentation.

# Modify Version Property (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.  
v2.macro.  
MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

## Page Contents:

- [Modify a Form Version Property](#)
  - [Example of Modifying the Form Description Property](#)
- [Synchronize Form Version with Organization Properties](#)
- [Delete a Form Version Property](#)

## Modify a Form Version Property

Another example for using form version properties is with the form description. To assist the user in choosing the correct form, the form description is displayed in the list of forms a user can view in the form space, as well as, on the form's landing page.

A form version property, *Form Description*, exists that is by default blank. It is advisable to update this with a suitable description.

## Example of Modifying the Form Description Property

The following are the steps for modifying the form description property:

1. From your list of form version properties, click the *Form Description* under the *Name* column (or click the *Edit* icon under the *Action* column).
2. Enter a suitable description for your form in the *Value* field.
3. Click the *Save* button.

The screenshot below displays the *Edit Version Property* page.

### Edit Version Property

Home Dashboard > Form > Form Version > Version Property

The screenshot shows a web form titled "Edit Version Property". At the top, there is a breadcrumb trail: "Home Dashboard > Form > Form Version > Version Property". The form itself has a "Name" field containing "Form Description" and a "Property Type" dropdown menu set to "Form Description - (Form Scope)". Below this is a table with one row: "1 Your Credit Card Application". Underneath the table is a large "Value" field. At the bottom of the form are two buttons: "Save" and "Close".

The screenshot below displays the list of forms in the form space, with the form description that was entered in the form version property:

The screenshot shows the "Forms" page in the AVOKA system. At the top left is the AVOKA logo. A navigation bar contains "Home", "Forms" (highlighted in orange), "Tasks", "History", "Reviews", and "Help Desk". Below the navigation bar is the heading "Forms" and the text "Select from the list of available forms below." There is a search bar with the text "Search" and a "Go" button. Below the search bar is a list of forms. The first form is "Credit Card Application", which has a sub-item "Your Credit Card Application" highlighted with a red box.

And this screenshot displays the form's landing page, with the form description that was entered in the form version property:

## Credit Card Application

Your Credit Card Application

Open New Form

Powered By Avoka Transact

### Synchronize Form Version with Organization Properties


At times, you may need to refresh the properties configured for your form version to be synchronized with the values configured for the organization. This is possible but proceed with care as there is no ability to undo this action.

When *Sync Org Properties* is clicked, Transact Manager will refresh all your form version properties customized where:

- The *Property Scope* is *Client*.
- There exists a customized property of the same name for the organization (of the form).



Before proceeding with the Sync Org Properties, it's advisable that you back it up by exporting the form version (refer to [Export a Form Version \(Manager v5.1\)](#) section).

To synchronize form version with organization properties for your form:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the *Form Version* column or the *Edit icon* () under the *Action* column.
5. Switch to the *Properties* tab.
6. Click the *Sync Org Properties* button.

### Delete a Form Version Property

It may be necessary to delete a form version property as follows:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the *Form Version* column or the *Edit icon* () under the *Action* column.
5. Switch to the *Properties* tab.
6. Find the form version property you wish to delete and click the *Delete icon* () under the *Action* column.
7. Confirm the deletion of the form version property by clicking *OK* from the confirmation dialog.

# Custom Services for a Form Version (Manager v5.1)

## Page Contents:

- [Overview](#)
- [View Custom Services for a Form Version](#)

## Overview

Out of the box, Transact Manager has a set of fundamental and fully functional services to perform key processes, such as form rendering. All these services may be customized to suit your specific requirements for a form version.


Where necessary, optional services may also be created and customized for a form version. This is the case for collaboration jobs when a form is chosen to partake as a collaboration job.

If left blank, the fundamental services will use the system default service. It is recommended to leave these services blank and only select and customize a service when required to do so.

In contrast, the optional services will not default to any service when left blank. For instance, if your form version is for a collaboration job, then you need to select the applicable service from the *Job Controller Service* dropdown. Otherwise, this form is a standard form and no system default service will be used for the *Job Controller Service*.

## View Custom Services for a Form Version

To view the custom services for a form version:

1. Select *Forms* from the menu bar, and then select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the *Form Version* column or the Edit icon () under the *Action* column.
5. Switch to the *Services* tab.

The table below lists the service dropdowns and provides a brief description of each.

Service	Description	When Left Blank
Job Controller Service	Applicable only when this form triggers a collaboration job.	Optional
Form Security Filter	For customized access control on form render. This service runs prior to the Transact Manager access controllers.	Optional
Form Prefill Data Service	For XML prefill of data when the form is rendered.	Optional
Form Render Service	For rendering the form template.	Optional
Form Submission Preprocessor	For providing an intercept of the Transact Manager form submission processing, to affect additional requirements such as revisions included prior to committing the submission.	Optional
Form Saved Processor	This is called when a form is saved online.	Optional
Submission Data Validator	This is called to validate the submitted form XML.	Optional
Submission Completed Processor	When a form submission for a collaboration job is complete and no more user steps are required.	Optional
Receipt Render Service	For rendering the form submission PDF receipt	Uses the system Default
eSignature Render Service	For rendering the form submission eSignature PDF receipt	Optional
Task Expiry Service	For when tasks expire.	Optional

## Related Pages:

- [Collaboration Job Information for a Form Version \(Manager v5.1\)](#)
- [Create a Form Version Property \(Manager v5.1\)](#)
- [Custom Services for a Form Version \(Manager v5.1\)](#)
- [Delete a Form Version \(Manager v17.10\)](#)
- [Delete a Form Version \(Manager v5.1\)](#)
- [Export a Form Version \(Manager v17.10\)](#)
- [Export a Form Version \(Manager v5.1\)](#)
- [Form Version Categories \(Manager v5.1\)](#)
- [Manage Form Version Properties \(Manager v5.1\)](#)
- [Manage Form Versions \(Manager v5.1\)](#)

Email Service	For sending submission related emails to users.	Uses the system Default
---------------	-------------------------------------------------	-------------------------

# Form Version Categories (Manager v5.1)

## Assign a Form Version to One or More Form Categories

If an organization has many forms, it may be practical to set up form categories. Using the form categories feature of Transact Manager will facilitate users searching for forms by providing filter by category option in the form space.

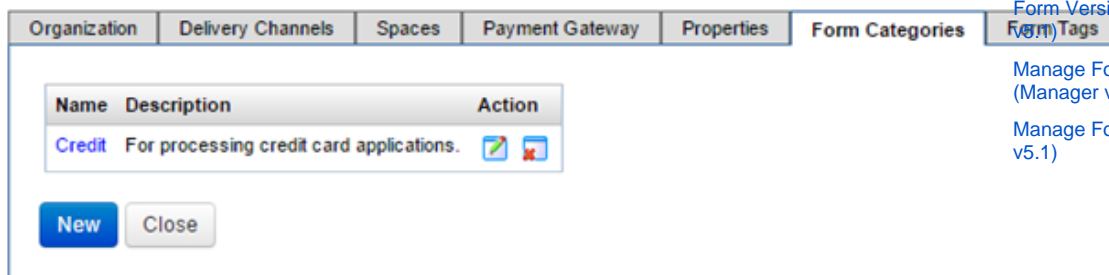
Form categories are maintained for an organization.

When at least one form version is assigned to a category, the *Forms* list in the form space will now include a *Category* dropdown to allow users to be able to filter by category.

As an example, there exists a category named *Credit* already set up for the organization (shown in the screenshot below). For more information on how to create a form category, please refer to the Form Categories section.

### Avoka Financial Group

Home Dashboard > Organization



#### Related Pages:

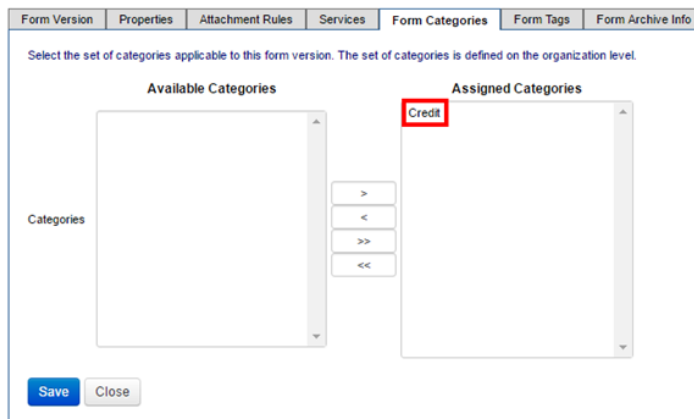
- [Collaboration Job Information for a Form Version \(Manager v5.1\)](#)
- [Create a Form Version Property \(Manager v5.1\)](#)
- [Custom Services for a Form Version \(Manager v5.1\)](#)
- [Delete a Form Version \(Manager v17.10\)](#)
- [Delete a Form Version \(Manager v5.1\)](#)
- [Export a Form Version \(Manager v17.10\)](#)
- [Export a Form Version \(Manager v5.1\)](#)
- [Form Version Categories \(Manager v5.1\)](#)
- [Manage Form Version Properties \(Manager v5.1\)](#)
- [Manage Form Versions \(Manager v5.1\)](#)

Next, assign your form version to the *Credit* form category by:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Select your form from the list, and then select the form version
3. Switch to the *Form Categories* tab.
4. Select *Credit* from the *Available Categories* section and click/button to move it to the *Assigned Categories* section.
5. Click the *Save* button.

### Credit Card Application - Version 2

Home Dashboard > Form > Form Version



In the form space, select *Credit* from the *Category* dropdown, as shown in the following screenshot:

## Forms

Select from the list of available forms below.

Category:

- ▶ [Credit Card Application](#)  
Your Credit Card Application

# Collaboration Job Information for a Form Version (Manager v5.1)

## Page Contents:

- [Overview](#)
- [View Collaboration Job Information for a Form Version](#)


## Overview

A form may or may not be set up as part of a collaboration job in Transact Manager. A form is a part of a collaboration job when it is assigned a *Job Controller Service* (in the *Services* tab).

Information about this collaboration job can be viewed within the form version. For more information about collaboration jobs, please refer to the [Collaboration Jobs](#) section.

## View Collaboration Job Information for a Form Version

To view collaboration job information for a form version:

1. Select *Forms* from the menu bar, and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Version* tab.
4. Find and select your form version by clicking either its number under the *Form Version* column or the *Edit icon* (  ) under the *Action* column.
5. Switch to the *Job Info* tab (visible only when a *Job Controller Service* has been selected as shown in the screenshot below).

### Credit Card Application - Version 2

Home Dashboard > Form > Form Version

The *Job Info* tab for the above form is displayed in the following screenshot:

### Credit Card Application - Version 2

Home Dashboard > Form > Form Version

Step Name	Type	Default Next Step	Available Routes (Route: Step Name)	Displayable Form Route Names
Application Start	Start	Application Review	Default: Application Review	Default
Application Review			Approve: Application Delivery, Reject: Application Rejected	Approve, Reject
Application Delivery		Application Completed	Default: Application Completed	Default
Application Completed	Endpoint			
Application Rejected	Endpoint			

**Job Form Data Maps:**

Form Data Map Name	Supported by Form
firstName	
lastName	

Form Data Extracts

For more information about collaboration jobs please refer to the [Collaboration Jobs](#) section.

## Related Pages:

- [Collaboration Job Information for a Form Version \(Manager v5.1\)](#)
- [Create a Form Version Property \(Manager v5.1\)](#)
- [Custom Services for a Form Version \(Manager v5.1\)](#)
- [Delete a Form Version \(Manager v17.10\)](#)
- [Delete a Form Version \(Manager v5.1\)](#)
- [Export a Form Version \(Manager v17.10\)](#)
- [Export a Form Version \(Manager v5.1\)](#)
- [Form Version Categories \(Manager v5.1\)](#)
- [Manage Form Version Properties \(Manager v5.1\)](#)
- [Manage Form Versions \(Manager v5.1\)](#)

# Configure Data for a Form Version (Manager v5.1)

 Unknown macro: 'redirect'

Related Pages:

## Page Contents:

- [Configure Data for a Form Version](#)
- [View the Form Data Configuration for a Form Version](#)

## Configure Data for a Form Version

Within Transact Manager, XML is the format used when data is being passed. Out of the box, Transact Manager automatically generates a default XML data structure that is fully functional in handling the data being passed into and out of the form entry progression.

From the beginning, when a user selects a form, Transact Manager takes charge of the data flow. This can be the standard default form processing, or as with most cases, the customized form processing, such as presenting a form that is already prefilled with details that are known.

To achieve this, you will need to configure data as part of the form version in Transact Manager. It is important to be aware that some of the same data settings can also be configured in Transact Maestro. Once the Maestro form version is published/built, these settings are then transferred across to Transact Manager.


In this section, we explain how to configure data for a form version in Transact Manager for the following customizations:

- Prefill a form with some known details, when selected by the user. The three different prefill methods supported are property, request parameter, and input XML. Refer to [Property Prefill Mapping \(Manager v5.1\)](#), [Request Param Prefill Mapping \(Manager v5.1\)](#), and [Input XML Prefill Mapping \(Manager v5.1\)](#) sections of the documentation.
- Capture and store additional details that are passed along with the form submission that may be required for handling such things as attachments, receipts and anonymous submissions. Refer to [Configuration Mappings \(Manager v5.1\)](#).
- Provide an alternative data structure, according to your enterprise's requirements, to the default XML. Refer to [Form XML Data \(Manager v5.1\)](#).
- Extract some details for easy access for monitoring and managing form submissions. Data extracts are also required for some collaboration job features. Refer to [Form Data Extract Mapping \(Manager v5.1\)](#).


The form developer configures these data customizations by defining data mappings from the Transact Manager and/or Maestro consoles. This is so that individual data elements can be externally defined and mapped to your form's XML data structure when the form is rendered. Although you will notice that *Form XML Data* is the exception as you can enter values directly into the form XML data structure.

## View the Form Data Configuration for a Form Version

To view data configuration for a form version:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form from the list (either click the *Edit* icon (  ) in the *Action* column or the link in the *Form Name* column).
3. In the *Form Versions* section, find the form version and click the *Data Config* link alongside it. Clicking this link will display the following data configuration tabs:
  - *Configuration Mapping*
  - *Form XML Data*
  - *Property Prefill Mapping*
  - *Request Param Prefill Mapping*
  - *Input XML Prefill Mapping*
  - *Form Data Extract Mapping*

The data configurations of a form version may also be reached via the *Form Version* tab:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Form Versions* tab.
4. Click on the  icon for the form version in the *Action* column.

Error rendering macro  
'contentbylabel'

com.atlassian.renderere.  
v2.macro.

MacroException: Error  
parsing 'sort' or

'reverse' parameter.

# Configuration Mappings (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Configuration Mappings \(Manager v5.1\)](#)
- [Form Data Extract Mapping \(Manager v5.1\)](#)
- [Form XML Data \(Manager v5.1\)](#)
- [Input XML Prefill Mapping \(Manager v5.1\)](#)
- [Prefill \(Manager v5.1\)](#)
- [Property Prefill Mapping \(Manager v5.1\)](#)
- [Request Param Prefill Mapping \(Manager v5.1\)](#)

## Configuration Mappings

As a normal part of form processing, there are often typical requirements established that need to be supported by the form. Common examples of these requirements are:

- Attachments
- Payments
- Signatures
- Email verification
- Form saving and retrieval
- Anonymous submission

Transact Manager offers a mechanism to support these additional processing requirements. This mechanism provides some data elements which, when configured, can function as a means of passing key details into and out of a user's form sessions. The configurations to support these additional processing requirements are managed in the *Configuration Mapping* tab.

To set up your form version's configuration mappings:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form.
3. In the *Form Versions* section, find the form version and click the *Data Config* link alongside it.
4. The *Configuration Mapping* tab will be displayed (if not, switch to it).
5. Configure the options, then click the *Save* button

The following screenshot displays the *Configuration Mapping* tab for a form version:

### Credit Card Application - Version 2 - Form Data Config

Home Dashboard > Form > Form Data Config

The configuration mappings are in three sections:

#### Default Form Data Mappings section

Field	Details
<i>Use Default Mappings</i>	If ticked, Transact Manager will use default Configuration Mappings for <i>Attachments</i> , <i>Payment Details</i> , <i>Receipts</i> , and <i>Signatures</i> . Only when this is unticked may you change the defaults for the following five XPath locations.
<i>Attachments XPath</i>	If <i>Use Default Mappings</i> is unticked, you may change the default XPath in the Form XML Data that contains the <i>Attachments</i> element.

<i>Payment Details XPath</i>	If <i>Use Default Mappings</i> is unticked, you may change the default XPath in the Form XML Data that contains the <i>PaymentDetails</i> element.
<i>Form Signatures XPath</i>	If <i>Use Default Mappings</i> is unticked, you may change the default XPath in the Form XML Data that contains the <i>Signatures</i> element. This element determines the type of Form Signature required. This must have a <i>SignatureTypeSelected</i> child element specifying the type of signature required.
<i>Abandonment Reason XPath</i>	If <i>Use Default Mappings</i> is unticked, you may change the default XPath in the Form XML Data that contains the <i>AbandonmentReason</i> element.
<i>Receipt XPath</i>	If <i>Use Default Mappings</i> is unticked, you may change the default XPath in the Form XML Data that contains the <i>Receipt</i> element.

Contact Form Data Mappings section

Field	Details
<i>Contact Phone XPath</i>	The XPath that points to the element in the Form XML Data where the user's contact telephone number is stored. This may also be defined in Maestro.
<i>Contact Email XPath</i>	The XPath that points to the element in the Form XML Data where the user's contact email address is stored. This may also be defined in Maestro.
<i>Contact Postcode XPath</i>	The XPath that points to the element in the Form XML Data where the user's contact postcode is stored.
<i>Contact Gender XPath</i>	The XPath that points to the element in the Form XML Data where the user's contact gender is stored.
<i>Contact Age XPath</i>	The XPath that points to the element in the Form XML Data where the user's contact age is stored.

Additional Form Data Mappings for

Field	Details
<i>Save Challenge XPath</i>	The XPath in the Form XML that contains the 'Save Challenge' element. This may also be defined in Maestro.
<i>Transaction Ref Number XPath</i>	The XPath in the Form XML Data that points to the element that contains the transaction reference number which will be stored with the submission. This is provided for backward compatibility.
<i>Transaction Value XPath</i>	The XPath in the Form XML Data pointing to an element that contains the numeric value of this transaction.
<i>Old Wet Signatures Required XPath</i>	The XPath in the Form XML Data pointing to an element that contains <i>true</i> if the form requires wet signatures.

# Form XML Data (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- Configuration Mappings (Manager v5.1)
- Form Data Extract Mapping (Manager v5.1)
- Form XML Data (Manager v5.1)
- Input XML Prefill Mapping (Manager v5.1)
- Prefill (Manager v5.1)
- Property Prefill Mapping (Manager v5.1)
- Request Param Prefill Mapping (Manager v5.1)

## Form XML Data

Transact Manager provides a default form XML data structure which represents a machine-readable copy of the form details as entered by the user.

Where your enterprise has specific data schema requirements that need to be observed, the default XML Data structure may be replaced with a seed XML data structure.

To do this:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form.
3. In the *Form Versions* section, find the form version and click the *Data Config* link alongside it.
4. Switch to the *Form XML Data* tab.

The following screenshot displays the *Form XML Data* tab for the form version:

**Credit Card Application - Version 2 - Form Data Config**  
Home Dashboard > Form > Form Data Config

Configuration Mapping | **Form XML Data** | Property Prefill Mapping | Request Param Prefill Mapping | Input XML Prefill Mapping | Form Data Extract Mapping

Form XML Data provides the seed XML data used to prefill the form with.

```
1 <?xml version="1.0" encoding="UTF-8"?>
2 <AvokaSmartForm>
3   <FirstName>
4   </FirstName>
5   <LastName>
6   </LastName>
7   <AreYouOver18Years>
8   </AreYouOver18Years>
9   <AddressLine1>
10  </AddressLine1>
11  <AddressLine2>
12  </AddressLine2>
13  <SuburbCity>
14  </SuburbCity>
15  <StateProvince>
16  </StateProvince>
17  <PostcodeZipcode>
18  </PostcodeZipcode>
19  <Country>
20  </Country>
21  <MobileNumberUS>
22  </MobileNumberUS>
23  <EmailAddress>
24  </EmailAddress>
25  <EmployerName>
26  </EmployerName>
27  <Position>
28  </Position>
29  <EmploymentType>
30  </EmploymentType>
31  <EmploymentEndDateIfOneExists>
32  </EmploymentEndDateIfOneExists>
33  <Salary>
34  </Salary>
35  <Per>
36  </Per>
37  <FirstName2>
38  </FirstName2>
39  <LastName2>
40  </LastName2>
41  <MobileNumberUS2>
42  </MobileNumberUS2>
43  <EmailAddress2>
44  </EmailAddress2>
45  <IsYourAddressDifferentToThe>
46  </IsYourAddressDifferentToThe>
47  <AddressLine12>
48  </AddressLine12>
49  <AddressLine22>
50  </AddressLine22>
51  <SuburbCity1>
52  </SuburbCity1>
53  <StateProvince1>
54  </StateProvince1>
55  <PostcodeZipcode1>
56  </PostcodeZipcode1>
57  <Country2>
58  </Country2>
59  <SFRData>
60  <systemProfile/>
61  </SFRData>
62 </AvokaSmartForm>
63
```

Form XML File:  No file chosen

Auto Format

5. The *Form XML Data* input area will display the form's XML. This may be updated in two ways (including both):
  - In the *Form XML File* field:
    - Click the *Choose File* button.
    - Find and select the seed XML file (must be an XML file) you wish to use as a replacement for the default XML.
  - Update the XML directly in the *Form XML Data* input area.  
You may wish to quickly test your form with some prefill data by adding the value(s) directly to the form XML data element(s). For example, enter the first name, *Sam*, in between the first name tags, `<FirstName>Sam</FirstName>`.

This is strictly only for testing, and it's better to avoid doing this entirely.

Also, remember to remove the test data when you're finished. This hard coded test data should never be promoted, especially to your production environment.

6. The *Auto Format* field is ticked to automatically format the XML in the *Form XML data* entry. Untick, if you wish to retain the original XML format when saving the XML.
7. Click the *Save* button.

To avoid syntax errors, the XML will be validated when you save.

# Form Data Extract Mapping (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Configuration Mappings \(Manager v5.1\)](#)
- [Form Data Extract Mapping \(Manager v5.1\)](#)
- [Form XML Data \(Manager v5.1\)](#)
- [Input XML Prefill Mapping \(Manager v5.1\)](#)
- [Prefill \(Manager v5.1\)](#)
- [Property Prefill Mapping \(Manager v5.1\)](#)
- [Request Param Prefill Mapping \(Manager v5.1\)](#)

## Form Data Extract Mapping

Whilst monitoring form submissions within Transact Manager, it may be useful to utilize the data extract feature. When configured, this feature allows some form data to be extracted and stored in external data elements against the form submission within Transact Manager.

Within Transact Manager, it is possible to extract data when a form is submitted. This extracted data is stored against each form's submission as a convenient way of viewing and accessing essential data from within Transact Manager, which may also be downloaded as an XLS file.

These data extracts may assist in monitoring and reporting especially for operational support. Data extracts are also required for supporting some other features such as in collaboration jobs. Please refer to the [Submission Data Extract](#) section in the [Transact Maestro Documentation](#).

In Transact, data extracts are defined as data extract mappings for a form version.

For more information on data extracts:

- **Maestro.** Refer to [Submission Data Extract](#).
- **Transact Manager.** The *Form Data Extract Mapping* tab explained below.

The data extract mappings specify where to find the data, as an XPath, to extract from the form XML and what to name the extracted value to be stored in TM.

Before proceeding, it is not advisable to create data extracts in Transact Manager, where data extracts have previously been created for your form version in Maestro. For other guidance please refer to the [Submission Data Extract](#) section of the Maestro documentation.

To define data extract mappings in Transact Manager:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form.
3. In the *Form Versions* section, find the form version and click the *Data Config* link alongside it.
4. Switch to the *Form Data Extract Mapping* tab.
5. For creating each data extract mapping:
  - a. Click the *New* button. The following screenshot displays the *Edit Submission Data Extract Mapping* screen having an entry to extract the *Card Type* entered in the form:

### Edit Submission Data Extract Mapping

Home Dashboard > Form > Form Data Config > Submission Data Extract Mapping

The screenshot shows a web form titled "Edit Submission Data Extract Mapping". The form has a breadcrumb trail: "Home Dashboard > Form > Form Data Config > Submission Data Extract Mapping". The form fields are: "Name" with the value "Card", "XPath" with the value "/CardType", "Searchable Extracted Data" (checked), "Encrypt Extracted Data" (checked), "Extract Repeating Data" (checked), "Sequence" with the value "1", and "Job Step Data Sharing" with "Publish to Shared Data" and "Subscribe to Shared Data" both checked. There are "Save" and "Close" buttons at the bottom left.

- b. Enter the details as shown in the above example.
  - *Name* is the label for the extracted/displayed/downloaded data item.
  - *XPath* is the XPath location in the form XML where the data item can be found.
  - *Searchable Extracted Data* is to indicate whether to enable searching on encrypted data (ticked). This is only relevant when *Encrypt Extracted Data* is also ticked.
  - *Encrypt Extracted Data* is to indicate whether to automatically encrypt the extracted data (ticked). This means that the value is unencrypted when accessed via the TM administration console, rest API, as well as from entities within Groovy scripts such as delivery services.
  - *Extract Repeating Data* is to indicate whether to automatically extract all repeating data (ticked). This is only relevant when you have at least one data item extracted that is a repeating element. As this setting is not available in Maestro, you will need to update it here where the data extract mapping was previously defined in Maestro. For more information about repeating data items please refer to the [Submission Data Extract](#) section of the Maestro documentation.
  - *Sequence* is the order that the extracted data item will display against the form submission. With the first data extract, it automatically starts at 1 and increments with each new data extract. This may be adjusted, but must be a unique value.
  - *Job Step Data Sharing* is relevant for form bundle collaboration jobs. For more information, please refer to the Collaboration Jobs section of this documentation.

- *Publish to Shared Data* is to indicate whether this data extract is to be shared with other submissions.
- *Subscribe to Shared Data* is to indicate whether this data extract is to use shared data of other submissions.

c. Click the *Save* button.

The following is a list of two data extracts that have been defined for this form version:

### Credit Card Application - Version 2 - Form Data Config

Home Dashboard > Submission Data Extract Mapping > Form Data Config

The Form Data Extract Mapping has been successfully saved.

Configuration Mapping | Form XML Data | Property Prefill Mapping | Request Param Prefill Mapping | Input XML Prefill Mapping | **Form Data Extract Mapping**

Form Data Extract Mapping are used define form XML values to be extracted when form XML data is submitted. This submission data extract information is summarized in the Form Submission Data view.

Extract Name	XPath	Searchable	Encrypted	Repeats	Sequence	Job Data Sharing	Action
Card	//CardType				1		
Terms	//InterestTerms				2		

Encrypt Extracted Data

**New** Save Close

You may perform the following actions:

Icon	Action for the Data Extract
	View and/or change (same as clicking on the number in the <i>Extract Name</i> column)
	Delete
	Reorder the sequence by moving one position (notice it's not shown/valid for the top data extract)

Once at least one form has been submitted, you will see from the form dashboard the *Form Submission Data* icon as highlighted in the screenshot below. Click this icon to view your form submission data.

### Credit Card Application

Home Dashboard > Form

Dashboard | Details | Flow Config | Email Verification | Form Versions | Abandonment | Page Tracking | Spaces | Group Access | Form Promotion | Deployment Schedule

**Form Details**

Form Display Name: Credit Card Application  
 Form Code: creditcardapplication  
 Organization: Avoka Financial Group  
 Delivery Channel: For Delivery Process  
 Created: 05 Jun 2017 - 23:37 by asmith  
 Last Modified: 11 Jul 2017 - 18:05 by asmith

**Form Versions**

Version	Current Version	Last Modified	Properties	Attachments	Services	Data Config		
2	✓	05 Jul 2017						
1		02 Jul 2017						

[New Form Version](#) [Export Current Form Version](#)

**Form URLs**

Spaces	Friendly	Landing	Form	Direct	QR Code
Web Plugin					
Work Space					

[Receipt Test Harness](#)

**Latest Transactions** [View All Transactions](#)

ID	Receipt Number	Time	Transaction Status	Receipt
94	ZRNNVH5	13 Jul 17 20:33	Delivery Not Ready	
93	CZ2BQ23	12 Jul 17 23:09	Delivery Not Ready	
67	4K25HKZ	25 Jun 17 07:59	Delivery Not Ready	
66	XZWRPVJ	25 Jun 17 07:44	Delivery Not Ready	
17	9Q57TOL	15 Jun 17 01:56	Delivery Not Ready	

**Close**

As an example of data extracts, the screenshot below shows two submissions and their *Card* and *Terms* (in columns shown), as entered by the form user:

### Form Submission Data



Home Dashboard > Form > Form Submission Data

Form: Credit Card Application | Version: 2 | Form Status: Active Only  | Start Date: 25 May 2017 00:00 | End Date: | **Search** Clear

ID	Tracking Code	Receipt Number	Time Submitted	Form Status	Device	Card	Terms	Action
67	4K25HKZ	4K25HKZ	25 Jun 17 07:59	Completed	Desktop	Student	Low Rate	
66	XZWRPVJ	XZWRPVJ	25 Jun 17 07:44	Completed	Desktop	Gold	55 Day Interest Free	

The following are actions you may perform on the form submission data:

Icon	Action for the Form Submission(s)
	View PDF receipt
	View submission details

	
	Download a list of all form submission extract data to an XLS file

# Prefill (Manager v5.1)

 Unknown macro: 'redirect'

## Related Pages:

## Prefill

Transact Manager offers flexibility in having a wide range of options to support the process of prefilling a form when it is first rendered to a user. The following three prefill mapping methods explain how to set this up for your form version.

A form's data configuration can contain one or more of the following methods of prefill data mappings in a form's XML data structure:

- Property prefill mappings, where properties for the form version are used for sourcing your data to prefill your form. Refer to the [Property Prefill Mapping \(Manager v5.1\)](#) section.
- XML prefill mappings, where an external XML file containing prefill data is obtained at the time that the form is rendered. This needs a prefill service to obtain the data values. Refer to the [Input XML Prefill Mapping \(Manager v5.1\)](#) section.
- Parameter prefill mappings, where prefill data is passed through as HTTP request parameters, session attributes or cookies. Refer to the [Request Param Prefill Mapping \(Manager v5.1\)](#) section.

Before a form is rendered and presented to end users, the various prefill methods are applied in the following order:

- Form XML Data Prefill
- Property prefill (client, form)
- Request parameter prefill
- Property prefill (user profile)

As a form can contain multiple prefill methods, it is important to understand the way this is handled in Transact Manager. Where multiple mappings to the same form field exist, prefill data obtained at later stages may override earlier obtained prefill data.

### Error rendering macro 'contentbylabel'

com.atlassian.renderer.

v2.macro.

MacroException: Error  
parsing 'sort' or

'reverse' parameter.

# Input XML Prefill Mapping (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Configuration Mappings \(Manager v5.1\)](#)
- [Form Data Extract Mapping \(Manager v5.1\)](#)
- [Form XML Data \(Manager v5.1\)](#)
- [Input XML Prefill Mapping \(Manager v5.1\)](#)
- [Prefill \(Manager v5.1\)](#)
- [Property Prefill Mapping \(Manager v5.1\)](#)
- [Request Param Prefill Mapping \(Manager v5.1\)](#)

## Input XML Prefill Mapping

Another way to prefill your form on render is by passing an XML prefill document to source the form details.

This method requires the following to be set up:

- A prefill service to be configured to obtain the required details to pass and an XML form created.
- A mapping of the fields in the XML prefill form passed to your XML form.

As an example, the XML prefill form will pass all the details for the first page of the *Credit Card Application* form. This will be handled by the form version prefill service which assembles the prefill details as an XML document.

First, configure your form version to invoke the prefill service:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form.
3. In the *Form Versions* section, find the form version and click the *Services* link alongside it.
4. Select a form prefill service from the *Form Prefill Data Service* dropdown as shown in the screenshot below.
5. Click the *Save* button.

## Edit Form Version

Home Dashboard > Form > Form Version

The Template Version has been successfully saved.

Form Version	Properties	Attachment Rules	Services	Form Categories	Form Tags	Form Archive Info	Form Design Metadata	Job Properties	Job Info
Job Controller Service									
Form Security Filter									
Form Prefill Data Service			Groovy Form Prefill - v1 (AFG)						
Form Render Service									
Form Submission Preprocessor									
Form Saved Processor									
Submission Data Validator									
Submission Completed Processor									
Receipt Render Service									
eSignature Render Service									
Task Expiry Process									
Email Service									

Save Close

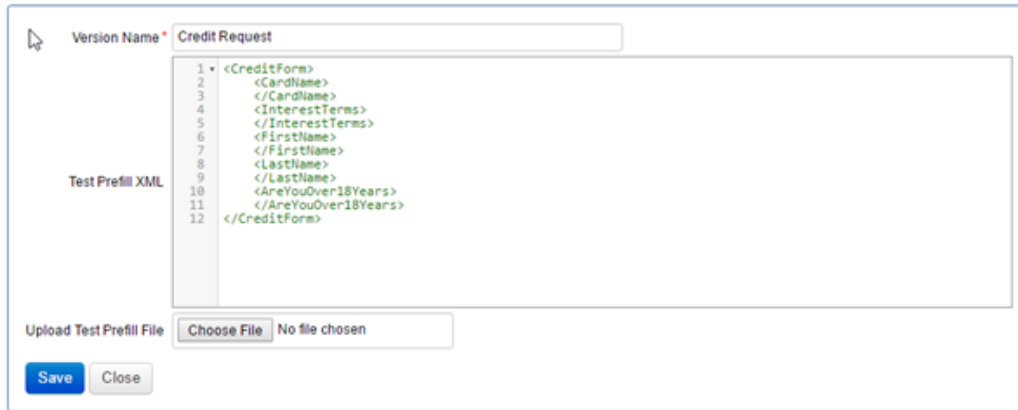
Then establish the mapped fields by:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form.
3. In the *Form Versions* section, find the form version and click the *Data Config* link alongside it.
4. Switch to the *Input XML Prefill Mapping* tab.

- Click the *Edit Input XML* button.  
The following screenshot displays the *Edit XML Input Version* screen:

### Edit XML Input Version

Home Dashboard > Form > Form Data Config > XML Input Version



- Enter a name into the *Version Name* text field.
- Enter the XML form structure of the external fields used for prefilling (must match the XML form that is generated by your *Form Prefill Data Service*).  
Alternatively, you may have an XML file which may be uploaded by:
  - Clicking on the *Choose File* button in the *Upload Test Prefill File* field.
  - Finding and selecting the XML file.
- Click the *Save* button.

The next step is to map each prefill (source) data element to the corresponding form (target) data element:

- Click on the *Edit XML Mapping* button.  
From the *Form Prefill Data Mapping* page, follow the steps shown in the screenshot below to drag and drop each data element from the:
  - Source: Prefill Data XML* section to the *Prefill Data XPath* section. The correct XPath will be transferred.
  - Target: Form Data XML* to the *Form Data XPath* next to the related prefill field. The correct XPath will be transferred.

The screenshot below displays the *Form Prefill Data Mapping* page.

Check that the XPaths are mapped correctly in the middle two sections. Also, please note that in the case of repeats, the parent of the repeatable object must be mapped to an identically named form data field.

- Click the *Save* button.

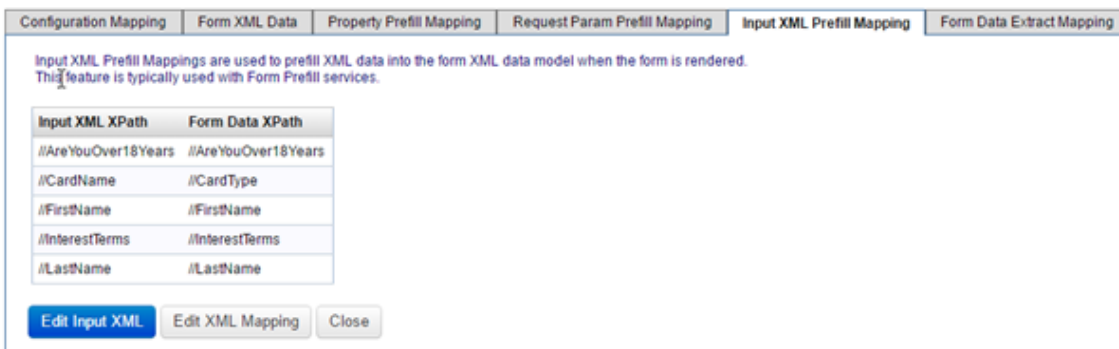
Form Prefill Data XML Mapping: Credit Request



Clicking the *Save* button will display the mapped data.

### Credit Card Application - Version 2 - Form Data Config

Home Dashboard > Form > Form Data Config



The following is an example of the rendered form that is pre-filled with data sourced by invoking the *Form Data Prefill Service* and in accordance with the mapped data elements.

**MAGUIRE**  
FINANCIAL

Reference Code: ZRNNVH5

Getting Started | Contact | Employment Details | Additional Cardholder

Save and Close | Cancel / Exit | Open Saved Form

## Getting Started

### Credit Card Application

Fields marked with \* are required

**OK, Lets Get Started!**

We make it easy to apply online and it won't take long, so **let's get going...**

**About You**

Section help goes here. Utilising the inbuilt additional text on sections to give some context

Card Type: Gold

Interest Terms: 55 Day Interest Free

First Name: Alex

Last Name: Brown

Are you over 18 years? \*

**Continue**

It is possible to also use the prefill data service and not need to map your fields. In this case, the exact same XML structure as the form XML must be returned from the service.

# Property Prefill Mapping (Manager v5.1)

Unknown macro: 'redirect'

Unknown macro: 'redirect'

## Property Prefill Mapping

In Transact Manager, Property Prefill Mapping utilizes the properties mechanism in Transact Manager to prefill forms when they are rendered to users.

An example of where property prefill mapping may be useful is when prefilling possible known user details such as an email address sourced from a logged in user's profile. This is done by mapping a target form data field to the applicable property of property scope, *User* used for sourcing the data value. This is a special case of properties

It is important to distinguish that the properties of *User* property scope are special properties that instruct Transact Manager to source the values from the current user profile (for user account) of the logged in user.

However, the *Client* and *Form* property scope properties are different as these can be used to directly and/or dynamically set values.

There are three property scopes provided in the properties framework. They are:

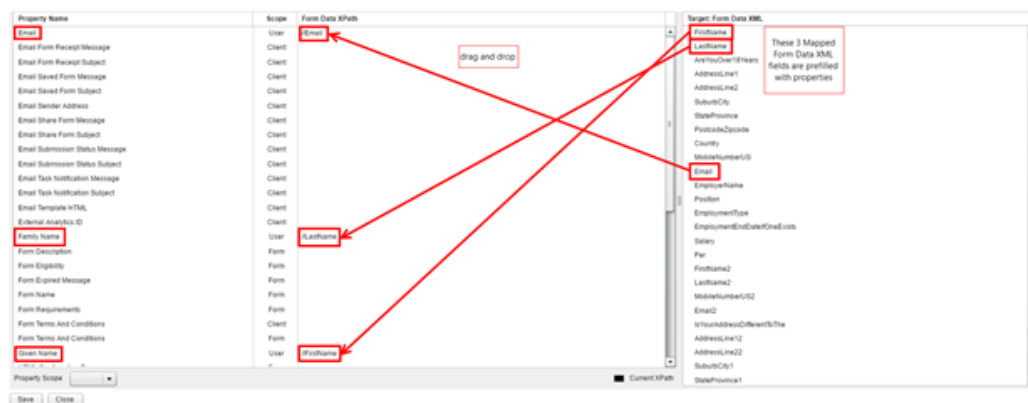
- *User* scope property which obtains the value from the user's profile of the logged in user. That is, this property is related to the user account.
- *Form* scope property which obtains its value directly and/or dynamically from that set against a form version.
- *Client* scope property which obtains its value from directly and/or dynamically from that set against an organization.

To do this:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form.
3. In the *Form Versions* section, find the form version and click the *Data Config* link alongside it.
4. Switch to *Property Prefill Mapping* tab.
5. Click the *Edit* button.
6. The page displayed has two main sections:
  - Property Mapping table containing three columns:
    - *Property Name* for the name of the property.
    - *Scope* for the scope of the property, *User*, *Client* or *Form*. You may wish to filter the list of properties based on the type of property scope by selecting *User*, *Client* or *Form* from the *Property Scope* dropdown.
    - Select *Client* for properties that should be set on an organization level.
    - Select *Form* for properties where values are specific to each form version.
    - Select *User* for properties sourced from the user profile.
  - *Form Data XPath* for the XPath of the target data element in the form XML. Where one exists for a property, it designates that this property is mapped to the XML data element in the *Form Data XPath* column. It is used for prefilling the corresponding field on the form.
  - *Target: Form Data XML* column for the target data element in the form XML.
7. To map a field to be prefilled by a property value, drag and drop the field from the *Target: Form Data XML* column to the *Form Data XPath* column against the related field from the *Property Name* column.

The screenshot below displays this process.

Form Prefill Property Mapping: Credit Card Application Version 2



### Related Pages:

- Configuration Mappings (Manager v5.1)
- Form Data Extract Mapping (Manager v5.1)
- Form XML Data (Manager v5.1)
- Input XML Prefill Mapping (Manager v5.1)
- Prefill (Manager v5.1)
- Property Prefill Mapping (Manager v5.1)
- Request Param Prefill Mapping (Manager v5.1)

- Click the *Save* button.  
The following screenshot shows the newly created property prefill mappings.

### Credit Card Application - Version 2 - Form Data Config

Home Dashboard > Form > Form Data Config

Property Name	Scope	Form XPath
Email	User	//Email
Family Name	User	//LastName
Given Name	User	//FirstName

Prefill with Organization Property Values  
 Update User Profile on Submission

The properties above are sourced from the logged in user's profile (*User Scope*).

From the *Property Prefill Mapping* tab, there are additional checkboxes that you may wish to change:

- Select or deselect the two checkboxes (if necessary):
  - If the *Prefill with Organization Property Values* checkbox is ticked, organization (client scope) defined property values will be used to prefill the form. Note that these Organization property values will be overridden by Property values defined at the Form Version level.
  - If the *Update User Profile on Submission* checkbox is ticked, any mappings that are for user properties (having *Scope* of *User*) will, on form submission, automatically update the form user's user profile based on what he/she entered on the form.
- Click the *Save* button.

When a user logs in and selects this form, the next two screenshots display the form as it will be rendered to the user. As can be seen in the screenshots, the form has been prefilled with the user profile values for *First Name*, *Last Name*, and *Email*.

Reference Code: 8J5S45C

Getting Started | Contact | Employment Details | Additional Cardholder

Save and Close | Cancel / Exit | Open Saved Form

## Getting Started

### Credit Card Application

Fields marked with \* are required

OK, Lets Get Started!

We make it easy to apply online and it won't take long, so **let's get going...**

**About You**

Section help goes here. Utilising the inbuilt additional text on sections to give some context

First Name: 
 Last Name:

Are you over 18 years? \*

And on the next page:

Getting Started

Contact

Employment Details

Additional Cardholder



Save and Close



Cancel / Exit



Open Saved Form

## Contact

### Credit Card Application

Fields marked with \* are required

Address Line 1

Address Line 2

Suburb / City

State / Province

Postcode / Zipcode

Country

Mobile Number (US)

Email

Go Back

Continue

You may wish to watch the [Transact Manager Property Prefill](#) video. In the video, you will see how to set and use property prefill of *Form* property scope.

# Request Param Prefill Mapping (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Configuration Mappings \(Manager v5.1\)](#)
- [Form Data Extract Mapping \(Manager v5.1\)](#)
- [Form XML Data \(Manager v5.1\)](#)
- [Input XML Prefill Mapping \(Manager v5.1\)](#)
- [Prefill \(Manager v5.1\)](#)
- [Property Prefill Mapping \(Manager v5.1\)](#)
- [Request Param Prefill Mapping \(Manager v5.1\)](#)

## Request Param Prefill Mapping

As another means of form prefill, data may be obtained from a HTTP request and used to prefill the form when it is rendered. Prefill data can be passed in via *jsonPrefillData*, request URL parameters, session values or cookie values.

When the form is rendered, Transact Manager will search for each request parameter prefill mapping to find a value. When a match is found, the value of the entity will be used as the prefill data. However, if multiple matches are found, the later entry takes precedence (e.g. request parameters over session attributes):

- Set of HTTP session attributes.
- Cookies
- Request parameters
- Special request parameter, *jsonPrefillData*.

Please note that it is recommended that you avoid passing any PII (Personal Identifiable Information) details, such as names or contact details, as parameters.

As an example, we may wish to pass the selected card type and interest terms as a request parameter to prefill a *Credit Card Application* form. Say the customer has already chosen the specific credit card from your general website, so there is no need for them to reselect the credit card when filling in the *Credit Card Application* form.

To configure the request parameter prefill method:

1. In Maestro, modify the *Credit Card Application* form, to include the following two fields that will be used to specify the credit card selected:
  - a. *Card Type* dropdown with options such as *Student*, *Low Fees*, *Gold*, and *Platinum*.
  - b. *Interest Terms* dropdown with options such as *55 Day Interest Free* and *Low Rate*.
2. Build your form.

In Transact Manager, you will need to define the *Request Param Prefill Mappings* in the following way:

1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form.
3. In the *Form Versions* section, find the form version and click the *Data Config* link alongside it.
4. Switch to the *Request Param Prefill Mappings* tab. If any mappings already exist they will be listed here.
5. Click the *New* button.
6. Enter the following mappings as shown in the two following screenshots. You must click the *Save* button for each parameter:

## Edit Prefill Data Parameter XPath Map

[Home Dashboard](#) > [Form](#) > [Form Data Config](#) > [Prefill Data Parameter XPath Map](#)

Parameter Name \*  ?

Form XPath \*  ?

## Edit Prefill Data Parameter XPath Map

[Home Dashboard](#) > [Form](#) > [Form Data Config](#) > [Prefill Data Parameter XPath Map](#)

Parameter Name \*  ?

Form XPath \*  ?





Now the list will show the newly defined mappings as follows:

### Credit Card Application - Version 2 - Form Data Config

Home Dashboard > Form > Form Data Config

Configuration Mapping | Form XML Data | Property Prefill Mapping | Request Param Prefill Mapping | Input XML Prefill Mapping | Form Data Extract Mapping

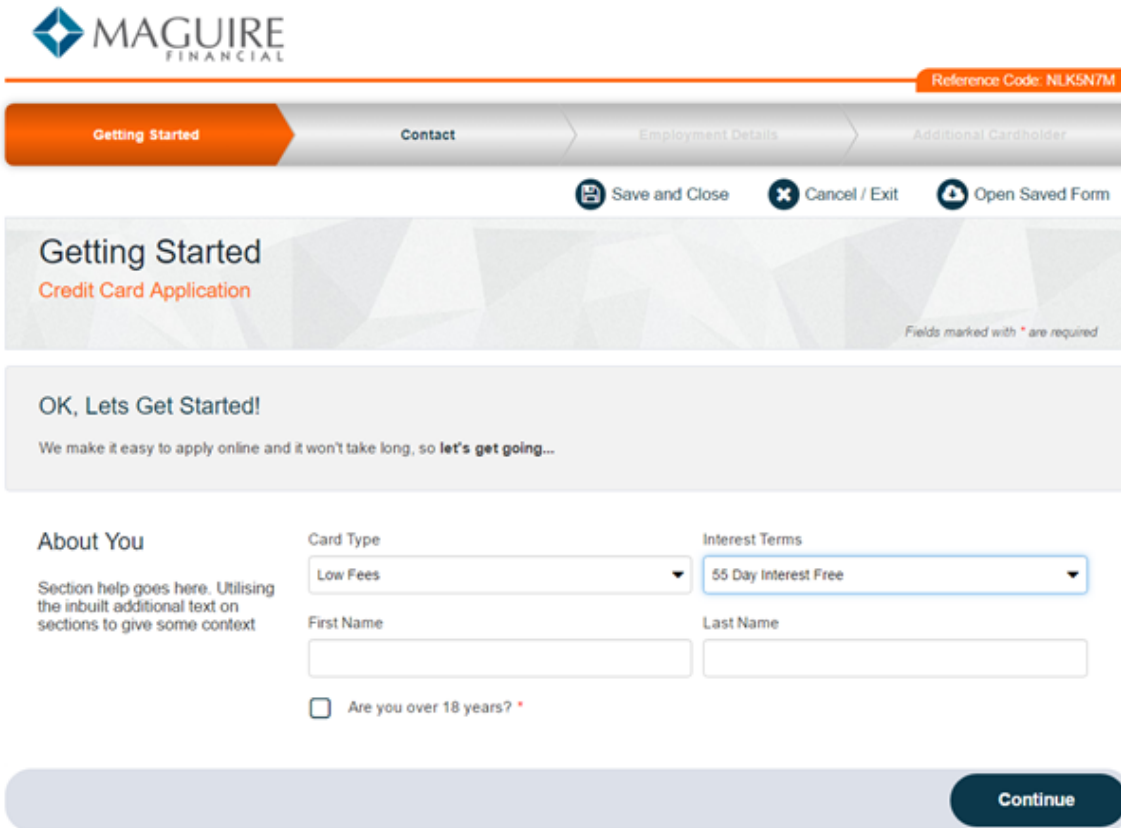
Request Param Prefill Mappings are used to map request jsonPrefillData, request URL parameters, cookie values, session values into the form XML data model when the form is rendered. This feature is supported in the Self Service Portal and Web Plug-in.

Parameter Name	Form XPath	Action
cardType	/AvokaSmartForm/CardType	 
interestTerms	/AvokaSmartForm/InterestTerms	 

[New](#) [Close](#)

To test these mappings, render your *Credit Card Application* form and try adding to the URL the parameters and values that match the dropdown options defined in Maestro.

In the following screenshot, the passed card type of *Low Fees* and the interest terms of *55 Day Interest Free* are used to prefill the *Credit Card Application* form when it is rendered:



MAGUIRE FINANCIAL

Reference Code: NLK5N7M

Getting Started | Contact | Employment Details | Additional Cardholder

Save and Close | Cancel / Exit | Open Saved Form

## Getting Started

### Credit Card Application

Fields marked with \* are required

OK, Lets Get Started!

We make it easy to apply online and it won't take long, so **let's get going...**

**About You**

Section help goes here. Utilising the inbuilt additional text on sections to give some context

Card Type: Low Fees

Interest Terms: 55 Day Interest Free

First Name: [ ]

Last Name: [ ]

Are you over 18 years? \*

[Continue](#)

# Delivery Channels (Manager v5.1)

 Unknown macro: 'redirect'

Related Pages:

Page Contents:

- [Overview](#)
- [What is a Delivery Channel?](#)
- [View a list of Delivery Channels](#)

## Overview

Once a form is submitted, Transact Manager must somehow pass the details on to the related back-end (or third party systems), as per your enterprise requirements and policies.

A delivery channel determines what happens to a transaction after a user enters and successfully submits a form. It also handles what happens to abandoned and invalid form entries.

The delivery process in Transact Manager will transfer the submission details in the form of:

1. PDF Receipt (readable copy of the user entered details).
2. XML (machine readable copy of the form entered details).
3. Attachments (if required as part of the form submission).

## What is a Delivery Channel?

Delivery channels are configured at the organization level and then associated to individual forms for specific purposes. This allows flexibility and control by allowing an organization in Transact Manager to authorize only a select group of customized delivery processes for its form's use.

For each organization, a decision as to what delivery methods will need to be used. A delivery channel is a delivery method that has been customized to suit your enterprise's specific requirements and policies.

Transact Manager supports five delivery methods.

1. **Delivery Process** invokes a service definition (written in Groovy) in Transact Manager to perform delivery of the submission details. This is the most widely used method.
2. **Email** emails the submission details as attachments to one or more configured email addresses. The email can include a link to the submission attachments (if any were included by the user).
3. **Email Secure** differs from *Email* in that the email sent does not contain any submission details. Instead, it contains a link to a secure page in Transact Manager where the submission details can be downloaded.
4. **Web Service** notifies your enterprise by making a web service call, using a pre-defined API (see the *Transaction Manager Web Service API* document).
5. **REST Service** stores the submission details within Transact Manager and offers a secure method of your enterprise retrieving these submission details (via a REST endpoint) when convenient.



Whilst all five delivery methods are currently supported in Transact Manager, the *Delivery Process* method is the most used and recommended. The delivery process offers a more customizable approach for a more immediate and secure form of delivery.

More information about these delivery methods can be found in the [Delivery Methods \(Manager v5.1\)](#) section.

## View a list of Delivery Channels

To check the existing delivery channels for your organization:

1. Select the *Forms* from the menu bar and *Organization* from the dropdown menu.
2. Find and select your organization.
3. Switch to the *Delivery Channels* tab. Below is a list of delivery channels for a sample organization. From here you may create, edit or delete delivery channels for your organization.

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.

v2.macro.

MacroException: Error





parsing 'sort' or

'reverse' parameter.

# In Finance Group

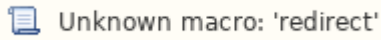
Home Dashboard > Organizations > Organization

Organization | **Delivery Channels** | Spaces | Payment Gateway | Properties | Form Categories | Form Tags

Name	Default	Method	Delivery Process	Disabled	Action
<a href="#">For Delivery Process</a>		Delivery Process	<a href="#">For Delivery Process - v2 (InFinanceGroup)</a>	<input type="checkbox"/>	 
<a href="#">For Email</a>		Email		<input type="checkbox"/>	 

[New](#) [Close](#)

# Create a Delivery Channel (Manager v5.1)



## Create an Organization's Delivery Channel

To create a delivery channel, follow the steps below:

1. Select the *Forms* from the menu bar and *Organization* from the dropdown menu.
2. Find and select your organization.
3. Switch to the *Delivery Channels* tab.
4. Click the *New* button.
5. Enter a name into the *Name* field for your new delivery channel. It must be a unique name within your organization.
6. Select a delivery method from the *Delivery Method* dropdown. Notice that additional fields for entering are displayed applicable to the delivery method selected (*Email*, *Email Secure*, *Web Service*, *REST Delivery* or *Process Delivery*).
7. Enter a description of your delivery channel in *Description* field (optional).
8. Select the *Default Delivery Channel* checkbox if you wish to designate it as the default delivery channel for any form submission (within this organization). This is for forms that have not been associated with a delivery channel.


### New Delivery Channel

[Home Dashboard](#) ▶ [Organizations](#) ▶ [Organization](#) ▶ [Delivery Channels](#)


**Delivery Channels** Forms


---

**Name \***

**Delivery Method \***  

**Description**

**Disabled**  

**Default Delivery Channel**  

9. Enter the details applicable for the selected delivery method.

# Associate a Delivery Channel to a Form (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

## Page Contents:

- [Associate a Delivery Channel to a Form](#)
- [Check Forms Associated with a Delivery Channel](#)

## Associate a Delivery Channel to a Form

As part of the Transact Manager ecosystem, a user selects a form and the following might happen:

User	Transact Manager
Successfully completes and submits the form	Delivers the successful form details to your back-end systems (or to a third-party)
Cancels the form entry	Delivers the abandoned form details to your back-end systems (or to a third-party)
Submits but a form validation error occurs	Delivers the failed form details to your back-end systems (or to a third-party)

For the above to be delivered to the back-end (or third party systems) you need to associate your form with the appropriate delivery channels as created by your organization.

To associate your form with the delivery channels, do the following:

1. Select *Forms* from the menu bar and *Forms* from the dropdown menu.
2. Find and select your form.
3. Click on the *Details* tab.
4. In the *Delivery Channels* section, from each of the following dropdowns you may choose a separate delivery channel:
  - a. *Production Delivery* to send successful submissions. However, if the form is in test mode, that is *Test Mode* checkbox is ticked, you must select the delivery channel from the *Test Delivery* dropdown instead to send successful submissions.
  - b. *Abandoned Delivery* to send abandoned submissions.
  - c. *Validation Failure Delivery* to send submissions with submission data validation errors.
5. Click the *Save* button.

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.  
v2.macro.

MacroException: Error  
parsing 'sort' or  
'reverse' parameter.

### Credit Card Application

Home Dashboard > Form

The screenshot shows the 'Details' configuration page for a form titled 'Credit Card Application'. The page has a navigation bar with tabs: Dashboard, Details (selected), Flow Config, Email Verification, Form Versions, Abandonment, Page Tracking, Spaces, Group Access, Form Promotion, and Deployment Schedule. The main content area contains several sections:

- Form Information:** Form Display Name (Credit Card Application), Form Code (creditcardapplicat4), Ref Form ID, Form Manager, Transaction Value, Transact Insights (Active checked, Log Form XML unchecked, Test Mode checked).
- Form Version Selector:** A dropdown menu with a 'New' button.
- Submission Expiry Date:** A date picker and a field for Submission Expiry Days.
- Tracking Code / Receipt Numbers:** Tracking & Receipt No. Mode (Use Tracking Code for Receipt No.), Tracking Code Service.
- Delivery Channels (highlighted with a red box):**
  - Production Delivery: For Delivery Process
  - Test Mode Delivery: (empty)
  - Abandoned Delivery: For Email
  - Validation Failure Delivery: For Delivery Process
- Transaction Data Retention Policies (max age):** Saved Transactions (days) (System: 30 days), Finished Transaction PII Data (days) (System: 7 days), Delete Form Data Extracts (unchecked).

At the bottom, there are buttons for 'Save', 'Validate Form', and 'Close'.

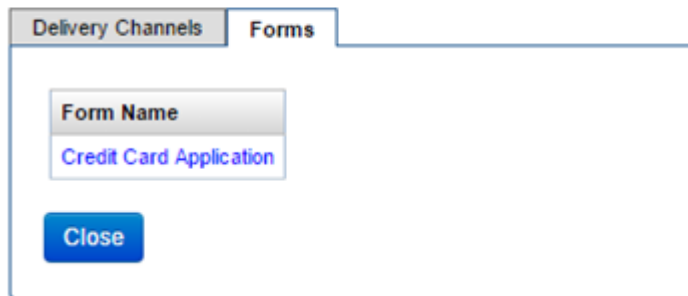
## Check Forms Associated with a Delivery Channel

Before making changes or deleting an organization's delivery channel it is advisable to first check for any forms that are associated to it.

1. Select *Forms* from the menu bar and *Organizations* from the dropdown menu.
2. Find and select your organization.
3. Switch to the *Delivery Channels* tab.
4. Select the delivery channel you wish to check.
5. Switch to the *Forms* tab as shown in the screenshot below. It has one form associated with this delivery channel.

### For Email Delivery

[Home Dashboard](#) > [Organizations](#) > [Organization](#) > [Delivery Channels](#)




The screenshot shows a web interface with two tabs: 'Delivery Channels' and 'Forms'. The 'Forms' tab is active. Below the tabs is a table with one row. The table has a header 'Form Name' and a single entry 'Credit Card Application'. Below the table is a blue 'Close' button.

Form Name
Credit Card Application

Close

# Delete a Delivery Channel (Manager v5.1)

 Unknown macro: 'redirect'


Related Pages:

## Delete a Delivery Channel

It may be necessary to remove a delivery channel from the authorized list of delivery channels for your organization. Before deleting a delivery channel of an organization, it is recommended that you reassign the form's delivery channel to a valid delivery channel by doing as follows:

1. Check forms associated with a delivery channel (see [Associate a Delivery Channel to a Form \(Manager v5.1\)#CheckFormAssociatedDeliveryChannel](#) for more information).
2. Reassign each form associated with this delivery channel to a valid delivery channel. This is explained on the [Associate a Delivery Channel to a Form \(Manager v5.1\)](#) page.

Once all forms have been reassigned then proceed to delete the delivery channel as follows:

1. Select *Forms* from the menu bar and *Organizations* from the dropdown menu.
2. Find and select your organization.
3. Find and select your organization.
4. Switch to the *Delivery Channels* tab.
5. Find the delivery channel you wish to remove and click the *Delete*  icon alongside it.
6. Confirm the delete action.

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.

v2.macro.

MacroException: Error

parsing 'sort' or

'reverse' parameter.

# Monitoring Submission Delivery (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

From the beginning when a user first opens a form, Transact Manager keeps track of the user interaction and all related system processing. This includes the delivery of submissions and notifications of when a form is either abandoned by the user or has resulted in validation errors.







Within Transact Manager an operator can monitor the form submissions by:

1. Select *Operations* from the menu bar and *Transaction Delivery* from the dropdown menu.
2. Use the top section of filter options to narrow your search.
3. With the transactions listed, it is possible to do a bulk update changing the status of all these transactions by clicking on one of the following buttons:
  - a. *Make All Delivery Ready* to reset delivery status to *Ready* so delivery will be retried.
  - b. *Clear All Delivery Checkpoints* is relevant only if the delivery service supports delivery checkpoints.
  - c. *Make All Delivery Completed* to set delivery status to *Completed* without retrying delivery.
  - d. *Make All Undeliverable* to set delivery status to *Undeliverable*, meaning that delivery will not be reattempted.

- [Associate a Delivery Channel to a Form \(Manager v17.10\)](#)
- [Associate a Delivery Channel to a Form \(Manager v5.1\)](#)
- [Create a Delivery Channel \(Manager v17.10\)](#)
- [Create a Delivery Channel \(Manager v5.1\)](#)
- [Delete a Delivery Channel \(Manager v17.10\)](#)
- [Delete a Delivery Channel \(Manager v5.1\)](#)
- [Delivery Channels \(Manager v17.10\)](#)
- [Delivery Channels \(Manager v5.1\)](#)
- [Delivery Methods \(Manager v17.10\)](#)
- [Delivery Methods \(Manager v5.1\)](#)


## Transaction Delivery

Home Dashboard > Transaction Delivery


ID	Receipt Number	Form	Org.	Delivery Status	Delivery Time	Delivery Message	Checkpoints	Attempts	Next Attempt	Disabled	Action
1821	8RRYP47	Credit Card Application	InFinanceGroup	Completed	18 May 15:11	Delivered via process: Trash Can Delivery Process - v1		1			 
1820	DVV42N8	Credit Card Application	InFinanceGroup	Completed	18 May 15:11	Delivered via process: Trash Can Delivery Process - v1		1			 
1819	8TQ3C2N	Credit Card Application	InFinanceGroup	Completed	18 May 15:11	Delivered via process: Trash Can Delivery Process - v1		1			 

You can view details for each submission, which also allows you to change the delivery status for an individual submission.


# Delivery Methods (Manager v5.1)

 Unknown macro: 'redirect'

This page describes each delivery method in more detail.

 Whilst all five delivery methods are currently supported in Transact Manager, the *Delivery Process* method is the most used and recommended. The delivery process offers a more customizable approach for a more immediate and secure form of delivery.

# Receipts (Manager v5.1)

 Unknown macro: 'redirect'

## Related Pages:

- [Configure Receipts for Forms \(Manager v17.10\)](#)
- [Configure Receipts for Forms \(Manager v5.1\)](#)
- [Receipt Numbers and Tracking Codes \(Manager v17.10\)](#)
- [Receipt Numbers and Tracking Codes \(Manager v5.1\)](#)
- [Receipts \(Manager v17.10\)](#)
- [Receipts \(Manager v5.1\)](#)

## Overview

Receipts are useful to both clients and end users and are an essential part of the transaction and submission process, as they provide end users with an un-editable statement acknowledging the data that they have submitted. Receipts in Transact Manager are presented in the form viewable PDFs. These PDF receipts are generated for all completed transactions and contain a unique receipt number. A receipt number is used to identify submitted transactions.

With the introduction of Transact Manager 5.1, user receipts are primarily obtained and delivery by email. There are two options available to send receipts to users via email.

- Email the PDF receipt directly to the user (as an attachment)
- Email a secure link that allows the user to directly download the PDF receipt

Transact Manager 5.1 still supports downloading PDF receipts on form confirmation pages. However, due to performance scaling considerations, this method is not recommended.

The generation of user receipts is performed in the background of Transact Manager by dedicated PDF receipt server nodes.

# Configure Receipts for Forms (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Configure Receipts for Forms \(Manager v17.10\)](#)
- [Configure Receipts for Forms \(Manager v5.1\)](#)
- [Receipt Numbers and Tracking Codes \(Manager v17.10\)](#)
- [Receipt Numbers and Tracking Codes \(Manager v5.1\)](#)
- [Receipts \(Manager v17.10\)](#)
- [Receipts \(Manager v5.1\)](#)

## Configure Receipts for Forms

Receipts in Transact Manager 5.1 are primarily delivered through the confirmation email that is sent to the user once they have submitted a form. There are two options that are available (and recommended) to configure the way in which PDF receipts are delivered to users:

- Confirmation and Receipt Attachment – Select this option to send a confirmation email to the user. This confirmation email will attach the PDF receipt which the user can download.
- Confirmation and Receipt Link – Select this option to send a confirmation email with a secure link to download the PDF receipt.

To customize the way PDF receipts are made available to the form user, you will need to follow the steps below.

1. Select *Forms > Forms* from the menu bar.
2. Select the form that you want to configure PDF receipts for and click the edit button. Selecting the form will direct you to the selected form's Dashboard page. This page is displayed in the screenshot below.

The screenshot shows the Transact Manager interface for a form named 'Attachments'. The top navigation bar includes Home, Forms, Operations, Analytics, Reports, Security, Services, and System. The breadcrumb trail is Home Dashboard > Forms > Form. The main content area has several tabs: Dashboard, Details, Flow Config, Email Verification, Form Versions, Abandonment, Page Tracking, Spaces, Group Access, Form Promotion, and Deployment Schedule. The 'Details' tab is active, showing 'Form Details' and 'Form Versions'. The 'Form Details' section includes: Form Display Name: Attachments, Form Code: attachments, Organization: Maguire Financial Group, Delivery Channel: Training Email, Created: 17 Mar 2017 - 09:37 by terry.learner, and Last Modified: 20 Mar 2017 - 16:14 by terry.learner. The 'Form Versions' section shows a table with one version (ID 1, Current Version checked, Last Modified 17 Mar 2017) and buttons for 'New Form Version' and 'Export Current Form Version'. The 'Latest Transactions' section shows a table with one transaction (ID 839, Receipt Number attachments-1, Time 17 Mar 17 10:04, Transaction Status Delivery Completed, Receipt icon). A 'Close' button is at the bottom left.

3. Select the *Flow Config* tab. Selecting this tab will direct you to the Form's *Flow Configuration* page. This page lets you configure the confirmation email that contains the PDF receipt. The screenshot below displays the Flow Configuration screen.

The screenshot shows the Transact Manager interface for a form named 'Attachments' in the 'Flow Configuration' page. The top navigation bar includes Home, Forms, Operations, Analytics, Reports, Security, Services, and System. The breadcrumb trail is Home Dashboard > Forms > Form. The main content area has several tabs: Dashboard, Details, Flow Config, Email Verification, Form Versions, Abandonment, Page Tracking, Spaces, Group Access, Form Promotion, and Deployment Schedule. The 'Flow Config' tab is active, showing 'Configure the User Flow options for the form.' The 'Submission Confirmation Options' section includes: Send Confirmation Email to User: Confirmation (dropdown), Show PDF Receipts: checked checkbox. The 'Custom Page Flow Options' section includes: Saved Page URL: e.g. https://mydomain.com/portal/saved.htm?submitKey=\${submission.submitKey}, Confirmation Page URL: e.g. https://mydomain.com/portal/confirmation.htm?submitKey=\${submission.submitKey}, Cancelled Page URL: e.g. https://mydomain.com/portal/submission-cancelled.htm?submitKey=\${submission.submitKey}. There are 'Save', 'Form Page', and 'Close' buttons at the bottom.

4. Select one of the following options from the *Send Confirmation Email to User* dropdown:
  - a. None – Select this option if you DO NOT want to send a confirmation email to the user
  - b. Confirmation – Select this option to send the Confirmation email with no attachment or link to the PDF receipt
  - c. Confirmation and Receipt Attachment – Select this option to send a confirmation email to the user. This confirmation email will attach the PDF receipt that the user can download.
  - d. Confirmation and Receipt Link – Select this option to send a confirmation email with a secure link to download the PDF receipt.
5. Select the *Show PDF Receipts* checkbox. Select this option if you would like to offer users of the form the opportunity to see the PDF receipt on the Confirmation Page that can be set up to appear as soon as the user submits the form. If no Confirmation Page is set up, then this setting will be ignored.
6. Click the *Save* button.



# Receipt Numbers and Tracking Codes (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Configure Receipts for Forms \(Manager v17.10\)](#)
- [Configure Receipts for Forms \(Manager v5.1\)](#)
- [Receipt Numbers and Tracking Codes \(Manager v17.10\)](#)
- [Receipt Numbers and Tracking Codes \(Manager v5.1\)](#)
- [Receipts \(Manager v17.10\)](#)
- [Receipts \(Manager v5.1\)](#)

## Receipt Numbers and Tracking Codes

Receipt numbers are used to uniquely identify submitted transactions. A tracking code is a unique alphanumeric code that is generated when a transaction begins and is used to track a transaction (ie a transaction that is yet to be submitted). Tracking codes are genuinely shorter than receipt numbers and by their nature are identified before a receipt number is generated. Transact Manager allows you to use the same value for both the receipt number and tracking code of a submission.

## Configure Receipt Numbers

Receipt number settings are configured in the *Details* tab when a form is being edited. The screenshot below displays the Details tab of a selected form.

The screenshot shows the 'Details' tab of the Transact Manager interface. The form configuration includes the following fields and options:

- Form Display Name:** 1.0.10 to 5.1.0
- Form Code:** 1010to510
- Ref Form ID:** (empty)
- Form Manager:** (dropdown menu)
- Transaction Value:** (input field)
- Transact Insights:** (checkbox, unchecked)
- Active:** (checkbox, checked)
- Log Form XML:** (checkbox, checked)
- Test Mode:** (checkbox, unchecked)
- Form Version Selector:** (dropdown menu, 'New' button)
- Submission Expiry Date:** (calendar icon)
- Submission Expiry Days:** (input field)
- Tracking Code / Receipt Numbers:**
  - Tracking & Receipt No. Mode:** Use Tracking Code for Receipt No.
  - Tracking Code Service:** Random Tracking Number - v1
- Delivery Channels:**
  - Production Delivery:** (dropdown menu)
  - Test Mode Delivery:** (dropdown menu)
  - Abandoned Delivery:** (dropdown menu)
  - Validation Failure Delivery:** (dropdown menu)
- Transaction Data Retention Policies (max age):**
  - Saved Transactions (days):** System: 30 days
  - Finished Transaction PII Data (days):** System: 7 days
  - Delete Form Data Extracts:** (checkbox, unchecked)

Buttons at the bottom: Save, Validate Form, Close.

The steps below document the process of configuring Receipt Numbers/Tracking Codes.

1. Select *Forms* > *Forms* from the menu bar.
2. Select the Form that you want to configure receipt numbers for and click the edit button.
3. Select the *Details* tab.
4. Navigate to the Tracking Code/Receipt Numbers section of the page
5. Use the *Tracking & Receipt No Mode* dropdown menu and select the most appropriate option for your form.
  - a. Use Tracking Code for Receipt No – Select this option if you would like the receipt number to be identical to the tracking code.
  - b. Use Receipt No for Tracking Code – Select this option if you would like the tracking code to be the same as the receipt number. Selecting this option will override the previously generated tracking code.
6. Click the *Save button*.

# Language Translator in Transact Manager (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

## Page Contents:

- [Overview](#)
- [Create New Form Property](#)

## Overview

Transact 5.1 allows translation to be added to single forms. This translation feature allows for multiple languages to be added to a single form, and for form users to be able to select from a set of configured languages the one that best suits their own individual needs.

To successfully implement translation into a transact form, the languages must first be created and setup in Transact Maestro. For more information on setting up and configuring languages in Maestro, refer to the [Language Translator in Maestro](#) section of the Maestro documentation.

When a form user switches between available languages, the form will pull a language JSON file from the server. This allows form builders the ability to edit the languages in either Maestro or Transact Manager. Editing the language in TM allows for improved workflow options, for example, a third party can create the translation file which can then be loaded into TM without any extra workload for the original form builder.

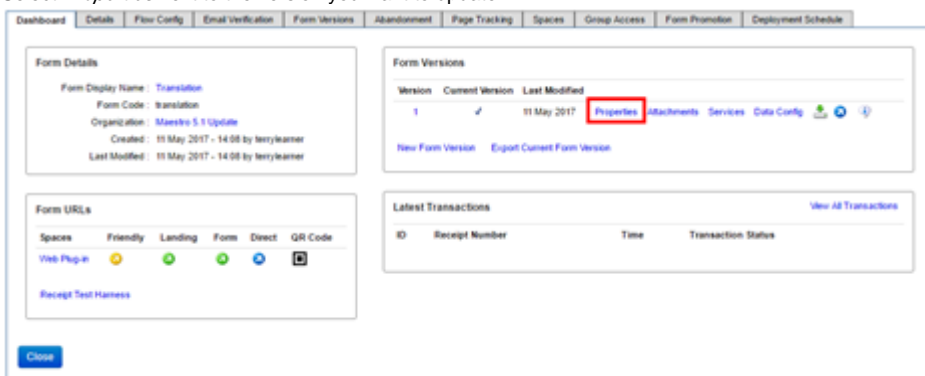
The JSON file created for each language can be added to the form in TM via a Form Property, or the language values can be entered directly into the Maestro editor. Translation language values can be created and edited outside of Maestro, however, when translation values are created and edited in Maestro, no Transact Manager modifications are required. Using Maestro to enter translation values is beneficial as it automatically handles things like refactoring.

Even though the translation file can be completed outside of Maestro, the form will still need to have some way for the form user to select the different configured languages (eg a Language Selection dropdown menu with the language options configured). For information on how to add the Select Language dropdown and how to create new languages, see the [Language Translator in Maestro](#) section of the Maestro documentation.

Once the translation file has been created, you can use Transact Manager to create a form property for the JSON file.

## Create New Form Property

1. Navigate to the Form Dashboard
2. Select *Properties* next to the version you want to update



3. Click *New*
4. Enter the property details  
The name of the property needs to be entered in a specific format in order for the Select Language dropdown to correctly match the JSON file with the selected option. The Name should be *locale-en.json*, where "en" is the language ID used with the language was created in Maestro. The Data Type is JSON and the Value is the JSON file.

Name\* locale-it.json

Property Type

Data Type\* JSON

```


1 {
2   "AvokaSmartForm": {
3     "label": "New Form",
4     "htmlLabel": "",
5     "mandatoryMsg": "",
6     "properties": {
7       "leavePageWarningMessage": ""
8     }
9   },
10  "form_header": {
11    "label": "Form Header",
12    "htmlLabel": "",
13    "mandatoryMsg": "",
14    "properties": {
15      "trackingCodePrefix": "Reference Code: "
16    }
17  },
18  "logo": {
19    "label": "Logo",
20    "htmlLabel": "",
21    "mandatoryMsg": "",
22    "properties": {
23      "alternativeText": "",
24      "tooltip": ""
25    }
26  },
27  "job_details_block": {
28    "label": "Job Details Block",
29    "htmlLabel": "",
30    "mandatoryMsg": "",
31    "properties": {
32      "arialabel": ""
33    }
34  }
35 }

```

5. Click *Save*

The new property is created. You can render the form, use the Select Language dropdown and the form content should translate based on the details in the JSON file.

# Submissions and Operations (Manager v5.1)

 Unknown macro: 'redirect'

The content within this section covers information relating to methods used to manage and keep track of operations and transactions made using the Transact platform.

Below you will find a list of topics within this section.

- [Tracking Submissions \(Manager v5.1\)](#)
- [Data Retention Management \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v5.1\)](#)
- [Saved Transactions \(Manager v5.1\)](#)
- [Abandoned Submissions \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Analytics and Reports \(Manager v5.1\)](#)

# Tracking Submissions (Manager v5.1)

Unknown macro: 'redirect'

## Page Contents:

- [Tracking Submissions](#)
- [View Form Transactions](#)
- [View Transaction Details](#)
- [Transaction Details](#)

## Tracking Submissions

In Transact Manager, one of the most important responsibilities of operations is to keep track of what forms users are submitting. This information can be found by viewing the *Form Transactions Log*.

[Avoka Transact Reporting Options](#) from [Avoka](#) on [Vimeo](#).

## View Form Transactions

The *Form Transactions Log* is accessed through the *Operations* menu of Transact Manager. This log identifies all transactions associated with a Transact Manager environment. The log lists each of the transactions associated with the TM environment and provides the tracking code, transaction ID, and status of each. As well as this information, the log also provides the name of the form and the form space and organization associated with each transaction. The key column of the *Form Transactions Log* is the *Transaction Status* column. This column indicates the status of the selected transaction. Depending on the status, various actions will be available.

To view the *Form Transactions Log*:

1. Navigate to *Operations* from the menu bar. Navigating to *Operations* will display the *Operations* menu.
2. Select *Form Transactions* from the *Operations* menu. The screenshot below displays an example of the *Form Transactions Log*.


ID	Tracking Code	Form	Org.	Time	Space	User / Contact Email	Payment	Transaction Status	Action
94	ZRNNVH5	Credit Card Application	AFG	13 Jul 20:33	Work Space	asmith		Job Delivery Not Ready	
93	CZ2BG23	Credit Card Application	AFG	12 Jul 23:09	Web Plug-in			Job Delivery Not Ready	
67	4KZ5H9Z	Credit Card Application	AFG	25 Jun 07:59	Web Plug-in			Job Delivery Not Ready	
66	XZWR6VJ	Credit Card Application	AFG	25 Jun 07:44	Web Plug-in			Job Delivery Not Ready	

The table below identifies and describes each of the actions that can be available for each transaction in the *Form Transactions Log*.

Icon	Action
	<p><b>View details</b></p> <p>Click this icon to view the details of the selected transaction. You may also click on the <i>ID</i> or the <i>Tracking Code</i>.</p>
	<p><b>View receipt</b></p> <p>Click this icon to view the PDF receipt of the selected transaction.</p>
	<p><b>Retry delivery</b></p> <p>This icon is made available when delivery of a transaction has not been completed, but submission data is still available.</p> <p>Click this icon to retry delivery of the transaction.</p>
	<p><b>Retry delivery from scratch</b></p>


## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

	<p>This icon is made available when delivery of a transaction has not been completed, but submission data is still available.</p> <p>Clicking this icon attempts to deliver the submission using the current delivery details set up in the form after deleting all existing delivery checkpoints for the submission. If no delivery checkpoints exist, this is equivalent to the retry delivery option above.</p>
	<p><b>Open Saved Form</b></p> <p>Clicking this icon opens the saved form to allow an administrator to complete the form on behalf of the user. As this is a sensitive operation, this action is only available to administrators whose roles include the permission, <i>Submission Save Edit</i>.</p>

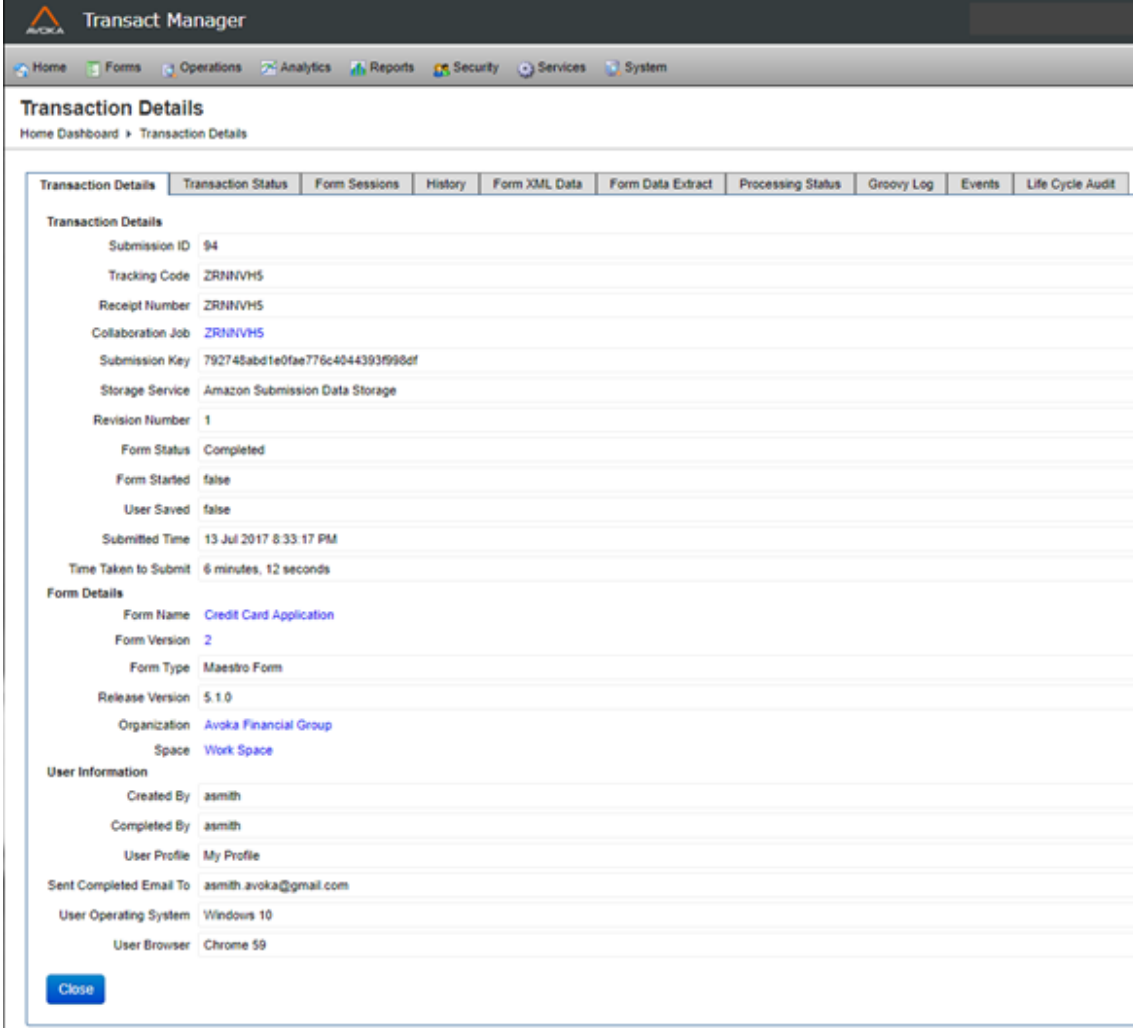
You can filter the log by using the search textbox, or the transaction status dropdown.

## View Transaction Details

Clicking the  icon directs to the *Transaction Details* page of the selected transaction. This page describes more details about the selected transaction and is divided by the following tabs (the tabs that are made available will differ depending on the content of the selected transaction. For example, the Errors tab will display if the transaction encountered any errors.

## Transaction Details

The *Transaction Details* tab displays specific details about the selected transaction. The screenshot below displays the contents of this tab.



The screenshot shows the Avoka Transact Manager interface. The main content area is titled "Transaction Details" and contains a tabbed interface. The "Transaction Details" tab is selected, showing the following information:

Field	Value
Submission ID	94
Tracking Code	ZRNNVH5
Receipt Number	ZRNNVH5
Collaboration Job	ZRNNVH5
Submission Key	792745abd1e0fae776c4044393f998df
Storage Service	Amazon Submission Data Storage
Revision Number	1
Form Status	Completed
Form Started	false
User Saved	false
Submitted Time	13 Jul 2017 8:33:17 PM
Time Taken to Submit	6 minutes, 12 seconds
Form Name	Credit Card Application
Form Version	2
Form Type	Maestro Form
Release Version	5.1.0
Organization	Avoka Financial Group
Space	Work Space
Created By	asmith
Completed By	asmith
User Profile	My Profile
Sent Completed Email To	asmith.avoka@gmail.com
User Operating System	Windows 10
User Browser	Chrome 59

A "Close" button is located at the bottom left of the details panel.

The *Transaction Details* tab is divided into the following sections:

- *Transaction Details*
- *Form Details*
- *User Information*

## Transaction Details

The *Transaction Details* section of the page documents the submission ID, tracking code, receipt number and the status of the transaction. If the selected transaction has been configured with Collaboration Jobs, then this section will display the code identifying the associated Collaboration Job.

## Form Details

The *Form Details* section of the page documents the name and version of the form, as well as the organization and space associated with the form.

## User Information

The *User Information* section of the page documents the details of the user who completed the form. These details include:

- The name of the user that created the transaction.
- The name of the Operating System that was used to create the transaction.
- The name of the browser that was used by the user that created the transaction.

# Transaction Status (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)

## Transaction Status

Switching to the *Transaction Status* tab displays relevant details pertaining to the status of the selected transaction. This tab is divided into the following sections:

- *User Transaction Flow Steps*
- *PDF Receipt Generation*
- *Transaction Data Delivery*
- *Collaboration Job* (only displays for transactions that are associated with a collaboration job)
- *Transaction Data Purging*

The screenshot below displays a common example of what is presented when the *Transaction Status* tab is selected.

The screenshot shows the 'Transaction Details' page in the 'Transact Manager' application. The 'Transaction Status' tab is selected, displaying the following information:

- User Transaction Flow Steps:**
  - Form Opened Time: 13 Jul 2017 8:27:04 PM
  - Form Submitted Time: 13 Jul 2017 8:33:17 PM
  - Last User Activity Time: 13 Jul 2017 8:33:17 PM
  - Form Completed Time: 13 Jul 2017 8:33:17 PM
  - Form Status: Completed
- Authentication Status:** Completed
- PDF Receipt Generation:**
  - Receipt Status: Completed
  - Receipt Render Duration (ms): 3013
  - Receipt Render Time: 13 Jul 2017 8:33:50 PM
  - Receipt Render Attempts: 1
- Transaction Data Delivery:**
  - Delivery Status: Not Ready
- Collaboration Job:**
  - Collaboration Job: ZRNNVHS
  - Job Status: In Progress
- Transaction Data Purging:**

Buttons for 'Save' and 'Close' are visible at the bottom left.

[Form Submission Data \(Manager v17.10\)](#)

[Form Submission Data \(Manager v5.1\)](#)

## User Transaction Flow Steps

This section of the page displays information regarding the time taken by the user to create the transaction. This information includes the date and time that the form was opened and submitted (if relevant) by the user. This section also documents the status of the transaction. For example, a transaction with the status of *Completed*, has been completed and submitted.

## PDF Receipt Generator

This section of the page displays information about the PDF receipt that is generated once a form is submitted. This information includes identifying the status of the PDF receipt. If the status is set to *Completed*, then the PDF receipt has been generated and sent to the user. If the status is set to *Ready*, then the PDF Receipt has been generated but has not been delivered to the user who submitted the form.

## Transaction Data Delivery

This section of the page identifies the *Delivery Status* of the selected transaction. The *Delivery Status* of a transaction refers to whether the transaction data is ready to be delivered (submitted). The *Delivery Status* can take on any of the following values.

- Not Ready
- Ready
- Not Required
- Undeliverable

You can change the *Delivery Status* of a transaction by using the *Delivery Status* dropdown. Use this dropdown to change the *Delivery Status* to mark transaction data as undeliverable, completed, or ready to be delivered a second time.

## Collaboration Job

This section of the page identifies the Collaboration Job code if the selected transaction has been configured with a Collaboration Job. For more information on Collaboration Jobs, refer to the [Collaboration Jobs](#) documentation.

# Form Sessions (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)

## Form Sessions

Switching to the *Form Sessions* tab displays a table documenting each of the sessions that were created during the time that the form was completed and submitted by an end user. A session in Transact Manager is created as soon as a user opens the form and ends as soon as the user leaves the form. The screenshot below displays an example of the contents of the *Form Submissions* tab.

### Transaction Details

Home Dashboard > Form Transactions > Transaction Details

Time	Version	Space	Session Duration	User	Device	User's OS / Browser	IP Address	Referrer	Action
20 Jul 09:30:34	1	Work Space	6 seconds	@avoka.com	Desktop	Windows 10 / Chrome 59	114.141.100.203	https://learning.avoka.com/manager/admin/form/form-edit.htm?_aid=285entryid-331&tab=panelindex=0	
20 Jul 09:30:42	1	Work Space	8 seconds	@avoka.com	Desktop	Windows 10 / Chrome 59	114.141.100.203	https://learning.avoka.com/manager/admin/form/form-edit.htm?_aid=285entryid-331&tab=panelindex=0	
20 Jul 09:30:52	1	Work Space	8 seconds	@avoka.com	Desktop	Windows 10 / Chrome 59	114.141.100.203	https://learning.avoka.com/manager/admin/form/form-edit.htm?_aid=285entryid-331&tab=panelindex=0	

[Form Requests Log \(Manager v5.1\)](#)

[Form Sessions \(Manager v17.10\)](#)

[Form Sessions \(Manager v5.1\)](#)

[Form Submission Data \(Manager v17.10\)](#)

[Form Submission Data \(Manager v5.1\)](#)

The most important column to make note of in this table is the *Session Duration* column. This column identifies the amount of time (in minutes and seconds) that the end user spent on the transaction for that session. Other pieces of information included in this table are:

- The *version* of the transaction.
- The *Space* associated with the selected transaction.
- The *device* and *Operating System/Browser* used to create the transaction.
- The *IP Address* of the user that created the transaction.
- The *referrer URL* that the user used to access the form that was used to create the transaction.

# Submission History (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

## Submission History

Switching to the *History* tab displays a list of all 'versions' of a transaction. A version of a transaction is created each time a form is opened and saved by a form user (until the form is submitted). The screenshot below displays the submission history of an example form.

Form Status	Time	Version	Space	Time to Submit	User	Device	User's OS / Browser	IP Address
Form Opened	26 Jul 10:03:15	12	Web Plug-in	-	-	Desktop	Windows 10 / Chrome 59	114.141.100.203
Background Saved	26 Jul 10:04:38	12	Web Plug-in	-	-	Desktop	Windows 10 / Chrome 59	114.141.100.203
Background Saved	26 Jul 10:04:41	12	Web Plug-in	-	-	Desktop	Windows 10 / Chrome 59	114.141.100.203
Form Submitted	26 Jul 10:05:45	12	Web Plug-in	2 minutes, 30 seconds	-	Desktop	Windows 10 / Chrome 59	114.141.100.203

The following options can be available for selection on each 'version' of a transaction.

- Select the *Form Session* (📄) icon to be directed to the *Form Request Details* page. This page displays common details about the transaction, as well as details about when the form was requested by the end user.
- Select the *View XML History* (📄) icon to download a copy of the submitted XML data (this option is commonly available to Composer Forms).
- Select the *View XML Diff* (🔍) icon to view the submitted XML data compared to the XML data of the blank (no input from the user) form (this option is commonly available to Composer Forms).

Both the *View XML History* and *View XML Diff* options are only made available when the *Log Form XML* checkbox is selected. To select this checkbox for a form, edit the form, and then switch to the *Details* tab. The screenshot below highlights the *Log Form XML* checkbox.

For auditing purposes, the IP address and the user's operating system and browser that was used to submit the data are also logged for each submission history entry.

# Form XML Data Submissions (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

## Form XML Data

Switching to the *Form XML Data* tab displays the XML data submitted by the user in the selected transaction. Under extremely rare circumstances (eg the user has completed the form, but form data has not yet been purged, and an error is preventing receipt generation or delivery), the submitted data can be accessed and edited by TM administrators (with appropriate permissions) and delivery can be re-attempted. This process of administrators accessing user XML data can be useful when users have entered characters that have caused backend processing issues.

Even if all attempts in a form's design have been made to capture invalid data before a form is submitted, there may be rare occasions where some invalid data entered into a form may slip through and cause the receipt generation and/or delivery to be blocked. To fix this issue, an administrator (with sufficient privileges) can access and change the user XML data causing the error. This process has the added benefit of cleaning the data before it reaches the user and the back-end processing.

Whenever an administrator views or changes user XML data, TM logs the operation to the *Audit Log*. When an administrator changes the data and saves the changes, the resulting XML is verified and stored as a new submission history entry (see Submission History), preserving the data previously submitted by the user.

The screenshot below displays an example of what is displayed when the *Form XML data* tab is selected.

```
Transaction Details | Transaction Status | Form Sessions | History | Form XML Data | Form Data Extract | Processing Status | Groovy Log | Life Cycle Audit
Form XML Data
1 <?xml version="1.0" encoding="UTF-8"?>
2 <!DOCTYPE form>
3 <CardType>Gold</CardType>
4 <InterestTerms>$$ Day Interest Free</InterestTerms>
5 <FirstName>Alex</FirstName>
6 <LastName>Brown</LastName>
7 <AreYouOver18Years>true</AreYouOver18Years>
8 <AddressLine1/>
9 <AddressLine2/>
10 <SuburbCity/>
11 <StateProvince/>
12 <PostcodeZipcode/>
13 <Country/>
14 <MobileNumberUS/>
15 <Email/>
16 <EmployerName/>
17 <Position/>
18 <EmploymentType/>
19 <EmploymentStartDateIfOneExists/>
20 <Salary/>
21 <Per/>
22 <FirstName2/>
23 <LastName2/>
24 <MobileNumberUS2/>
25 <Email2/>
26 <IsYourAddressDifferentToThe/>
27 <AddressLine12/>
28 <AddressLine22/>
29 <SuburbCity2/>
30 <StateProvince2/>
31 <PostcodeZipcode2/>
32 <Country2/>
33 <SPData>
34 <SystemProfile>
35 <FormCode>Creditandapplication</FormCode>
36 <TemplateVersionNumber>2</TemplateVersionNumber>
37 <UpdateUserProfile>false</UpdateUserProfile>
38 <ExitContext>Page</ExitContext>
39 <SubmissionType>Submitted</SubmissionType>
40 <OnlineSaveEnabledFlag>true</OnlineSaveEnabledFlag>
41 <Referer>{CData:http://knowledge.team.avoka-transact.com/manager2/padid/23form/23form-edit.htm?Fentityid3015326tabPanelIndex3308526_wid3309}</Referer>
42 <RequestLogKey>8ff5e18ef4825fa00182b25406c</RequestLogKey>
43 <TestNode>false</TestNode>
44 <SubmissionNumber>93</SubmissionNumber>
45 <DisplayNode>Receipt</DisplayNode>
46 <ShareForm/>
47 <ComposerDataVersion>5.1.0</ComposerDataVersion>
48 <ServerBuildNumber>5.1.3</ServerBuildNumber>
49 <RevisionNumber>1</RevisionNumber>
50 <FormDataServiceURL>https://knowledge.team.avoka-transact.com/web-plugin/service/ForDynamicDataService/ForDataServiceURL
51 <OfflineSubmissionId>765889798429394820c700fe79d445a</OfflineSubmissionId>
52 <TrackingCode>C228023</TrackingCode>
53 <AbandonmentReason/>
54 <AbandonmentComments/>
55 <ReceiptNumber>C228023</ReceiptNumber>
56 <SubmitDateString>12 Jul 2017 11:09:50 PM</SubmitDateString>
57 </SystemProfile>
58 </SPData>
59 </AvokaSmartForm>
60
```

# Submission Events (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

## Submission Events

Switching to the *Events* tab will display any events that were logged against the selected transaction. The *Events* tab is only made available when events such as errors or saves have occurred within the transaction. In the example shown below, there are events showing that a transaction was saved, and when it was delivered through the configured delivery channel.



The screenshot shows the 'Transaction Details' page with the 'Events' tab selected. The page contains a table with the following data:

ID	Event Time	Event Type	Message	Action
5516	12 Mar 2014 16:47:53	Info	Delivered via process: Deliver To Directory Process	
5517	12 Mar 2014 16:44:05	Info	Attachments completed by banner for submission (receipt no. cpf-804-22). User's remote IP address was 114.141.100.97, and browser user-agent was: Mozilla/5.0 (Windows NT 6.1; WOW64; rv:27.0) Gecko/20100101 Firefox/27.0	

# Form Data Extract (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

## Form Data Extract

Switching to the *Form Data Extract* tab will display any items that have been instructed to be extracted from the submitted XML data. This tab is made available when data extracts are set up and configured. For details on setting up *Data Extract Mappings*, refer to the *Form Version Configuration* section of the Transact Manager 5.1 documentation.

The screenshot below displays an example list of extracted values of a transaction.


Transaction Details  
Home Dashboard > Form Transactions > Transaction Details

Transaction Details | Transaction Status | Request | History | Form XML Data | **Form Data Extract** | Processing Status | Events

Name	Value	Form XPath
First Name	John	/kivokaSmartForm/GettingStarted/AboutYou/Firstname
Last Name	Doe	/kivokaSmartForm/GettingStarted/AboutYou/Surname
Phone Number	30368776655	/kivokaSmartForm/GettingStarted/AboutYou/contact/Phonenumber
Email Address	john.doe@test.com	/kivokaSmartForm/GettingStarted/AboutYou/contact/Emailaddress

[Reload](#) [Delete](#) [Close](#)

# Data Retention Management (Manager v5.1)

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The content within this section covers information relating to data retention in Transact Manager.

Below you will find a list of topics within this section.

- [Data Retention Management Overview \(Manager v5.1\)](#)
- [Data Retention Policy Mode \(Manager v5.1\)](#)
- [Data Retention Status \(Manager v5.1\)](#)
- [Data Retention Schedule \(Manager v5.1\)](#)
- [Triggering Data Retention \(Manager v5.1\)](#)
- [Form Submission Categories \(Manager v5.1\)](#)

# Data Retention Management Overview (Manager v5.1)

 Unknown macro: 'redirect'

## Data Retention Management Overview

Transact Manager incorporates a data retention management capability that is highly customizable to suit your company's data requirements. This is instrumental in achieving the following:

- Control the growth of database tables
- Maintain high system performance
- Purge transaction form data which contains Personally Identifiable Information (PII) entered by end users

When Transact Manager is first installed or upgraded, a data retention policy mode of either *strict* or *relaxed* is nominated for your environment. This data retention policy mode determines the length of time transactional data that will be kept within your Transact Manager environment. The selected policy can be customized at the environment level. Specific data retention settings can also be customized for an organization, as well as individually forms.

The *strict* mode (recommended) enforces less transactional, historical and log data to be retained within Transact Manager than the *relaxed* mode.

Transact Manager provides a scheduled job that automatically purges any transaction, based on the data retention management settings, that have reached its maximum age.

### Related Pages:

- [Data Retention Management Overview \(Manager v17.10\)](#)
- [Data Retention Management Overview \(Manager v5.1\)](#)
- [Data Retention Policy Mode \(Manager v17.10\)](#)
- [Data Retention Policy Mode \(Manager v5.1\)](#)
- [Data Retention Schedule \(Manager v17.10\)](#)
- [Data Retention Schedule \(Manager v5.1\)](#)
- [Data Retention Status \(Manager v17.10\)](#)
- [Data Retention Status \(Manager v5.1\)](#)
- [Form Level Settings \(Manager v17.10\)](#)
- [Form Level Settings \(Manager v5.1\)](#)

# Data Retention Policy Mode (Manager v5.1)

Unknown macro: 'redirect'

Related Pages:

## Data Retention Policy Mode

The data retention policy mode, either *strict* or *relaxed*, is selected during the installation of Transact Manager (both during a new installation and an upgrade). The selected policy will determine the default data retention management settings at the environment level. These settings are used throughout the TM environment, unless an organization and/or form has been specifically customized.

To see which data retention policy mode your environment is using, navigate to *System* from the TM menu bar, and then click *System Info* from the dropdown menu. The policy mode can only be selected during a new installation or an upgrade.

The following screenshot shows a *strict* data retention policy mode selected.

**System Information**  
Home Dashboard > System Information

**Runtime Info**

Current Process ID	1439
Active Threads	100
Free Memory	3,549 MB
Total Memory	4,096 MB
Max Memory	4,096 MB
Number CPU / Cores	2
CPU Speed	2.14 GHz
Server Uptime	95 hours

**Build Properties**

Name	Value
cookie.secure	true
data.retention.policy	strict
database.product	mysql

We recommend that you use the *strict* mode, as this mode restricts the maximum transaction data age. Restricting the age of transaction data avoids problems caused by long data retention (database growth, performance decrease, long storage of sensitive personally identifiable information).

In Transact Manager, a data retention policy mode restricts the length of time transactions are retained by TM. Both the *strict* mode and the *relaxed* mode initially apply different sets of default settings for data retention elements. Each of these default settings can be individually configured to a value that does not exceed the maximum value as shown in the table below.

These global default data retention management settings can be viewed and customized from the *Data Retention Management* page (found under the *Systems* menu).

The table below outlines the differences between the two data retention policy modes, as well as the default and maximum values for the retention settings.

	Strict Mode		Relaxed Mode		Explanation
	Default	Max	Default	Max	
Saved Transactions	30 days	180 days	30 days	2 years	<p>This setting determines how long to keep user saved transactions before they are abandoned by TM (and become finished transactions). For more information on abandoned transactions see <a href="#">Abandoned Submissions (Manager v5.1)</a></p> <p>The TM environment setting is initially set to the <i>Default</i>. However, it may be changed to any value that doesn't exceed the <i>Max</i>.</p> <p>Organization and form level settings can be used to override the environment settings. However, they cannot exceed the <i>Max</i> value (further restrictions may apply).</p>
Finished Transactions	7 days	30 days	7 days	2 years	<p>This setting determines how long to keep data entered by the user before it is deleted.</p> <p>The TM environment setting is initially set to the <i>Default</i>. However, it may be changed to any value that doesn't exceed the <i>Max</i>.</p> <p>Organization and form level settings can be used to override the environment settings.</p>

Error rendering macro 'contentbylabel'

com.atlassian.renderer.v2.macro.  
MacroException: Error parsing 'sort' or 'reverse' parameter.

on PII Data					However, they cannot exceed the <i>Max</i> value (further restrictions may apply).
Finished Transactions	90 days	2 years	90 days	5 years	<p>This setting determines how long to keep finished transactions before they are deleted. Finished transactions include transactions that have been marked as abandoned or completed.</p> <p>The TM environment setting is initially set to the <i>Default</i>. However, it may be changed to any value that doesn't exceed the <i>Max</i>.</p> <p>Organization and form level settings can be used to override the environment settings. However, they cannot exceed the <i>Max</i> value (further restrictions may apply).</p>
Finished Collaboration Jobs	90 days	2 years	90 days	2 years	<p>The setting determines how long to keep finished collaboration jobs before they are deleted.</p> <p>The TM environment setting is initially set to the <i>Default</i>. However, it may be changed to any value that doesn't exceed the <i>Max</i>.</p> <p>Organization and form level settings can be used to override the environment settings. However, they cannot exceed the <i>Max</i> value (further restrictions may apply).</p>
Submission Data Extracts	Same as Finished Transaction PII Data		Initially same as Finished Transaction setting, but may be changed to adopt the Finished Transaction PII Data setting.		<p>The setting determines how long to keep submission data extracts before they are deleted.</p> <p>You can only override this in the relaxed mode at the individual organization and/or form levels.</p>
Submission Properties	Same as Finished Transaction PII Data setting		Same as Finished Transactions setting		<p>The setting determines how long to keep submission properties before they are deleted.</p> <p>You cannot override this setting in either strict or relaxed mode.</p>

# Organization Level Settings (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Data Retention Management Overview \(Manager v17.10\)](#)
- [Data Retention Management Overview \(Manager v5.1\)](#)
- [Data Retention Policy Mode \(Manager v17.10\)](#)
- [Data Retention Policy Mode \(Manager v5.1\)](#)
- [Data Retention Schedule \(Manager v17.10\)](#)
- [Data Retention Schedule \(Manager v5.1\)](#)
- [Data Retention Status \(Manager v17.10\)](#)
- [Data Retention Status \(Manager v5.1\)](#)
- [Form Level Settings \(Manager v17.10\)](#)
- [Form Level Settings \(Manager v5.1\)](#)

## Organization Level Settings

By default, organizations use the global data retention settings (setup in the *Data Retention Management* page). However, you can customize the *Saved Transactions* and *Finished Transaction PII Data* on the organization level if desired. These settings will then apply to all transactions associated with forms belonging to this organization.

To edit the organization data retention settings:

1. Navigate to *Forms* from the TM menu bar, and then click *Organizations* from the dropdown menu.
2. Select the organization that you want to edit data retention settings for and click the edit icon.
3. Switch to the *Data Management* tab.  
The screenshot below displays an example of the content found in the *Data Management* tab.

The screenshot shows the 'Data Management' tab in the application. It displays two main sections: 'Transaction Data Retention Policies (max age)' and 'Transaction Form Data Storage Settings'. Under the first section, there are two input fields: 'Saved Transactions (days)' with a value of 30 days and 'Finished Transaction PII Data (days)' with a value of 7 days. The second section includes a dropdown for 'Submission Data Storage Service', a dropdown for 'Data Encryption Key Rotover' set to 'Monthly', and a checkbox for 'Encrypt Data Extracts'. At the bottom, there are 'Save' and 'Close' buttons.

The above screenshot is an example for a **strict** data retention policy mode. Whereas an additional setting will be available for a **relaxed** mode, *Delete Form Data Extracts* checkbox, as shown in the following screenshot.

This screenshot is similar to the previous one but includes an additional checkbox labeled 'Delete Form Data Extracts' which is highlighted with a red box. This checkbox is located below the 'Finished Transaction PII Data' field and above the 'Submission Data Storage Service' dropdown.

From the *Data Management* tab, if you wish to override the global *Data Retention Management* settings, enter custom values for:

- **Saved Transactions** – This setting will default to the global default (shown in gray). A value can be entered in the *Saved Transactions* field but must not exceed the global default, in this case, *System: 30 days*, when the *Enforce System/Org Thresholds* checkbox (in the *Retention Settings* tab) is ticked.
  - **Finished Transaction PII Data** – This setting will default to the global default (shown in gray). A value can be entered in the *Finished Transaction PII Data* field but must not exceed the global default, in this case, *System: 7 days*, when the *Enforce System/Org Thresholds* checkbox (in the *Retention Settings* tab) is ticked.
  - **Delete Form Data Extracts** (only for **relaxed** mode) – This checkbox is by default unticked meaning that the data extracts will be purged at the same time as the finished transaction records, as per *Finished Transactions* setting (in the *Retention Settings* tab). If you wish to enforce a stricter setting, select the *Delete Form Data Extracts* checkbox. This will mimic the **strict** data retention policy of purging the form data extracts at the same time as purging the PII data, as per *Finished Transaction PII Data* setting.
4. Click the *Save* button to save your changes.  
Once you have saved your changes, all forms of this organization may use these new override data retention settings instead of the global corresponding settings.

# Form Level Settings (Manager v5.1)

Unknown macro: 'redirect'


## Related Pages:

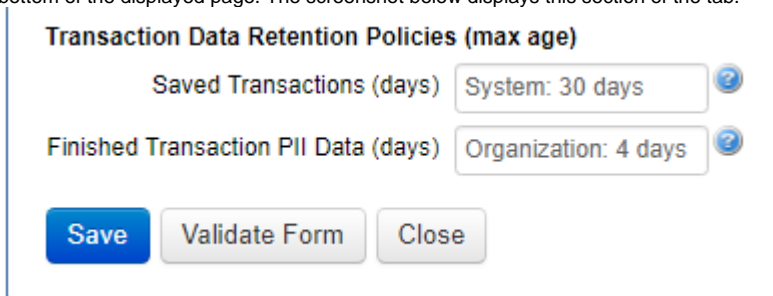
- [Data Retention Management Overview \(Manager v17.10\)](#)
- [Data Retention Management Overview \(Manager v5.1\)](#)
- [Data Retention Policy Mode \(Manager v17.10\)](#)
- [Data Retention Policy Mode \(Manager v5.1\)](#)
- [Data Retention Schedule \(Manager v17.10\)](#)
- [Data Retention Schedule \(Manager v5.1\)](#)
- [Data Retention Status \(Manager v17.10\)](#)
- [Data Retention Status \(Manager v5.1\)](#)
- [Form Level Settings \(Manager v17.10\)](#)
- [Form Level Settings \(Manager v5.1\)](#)

## Form Level Settings

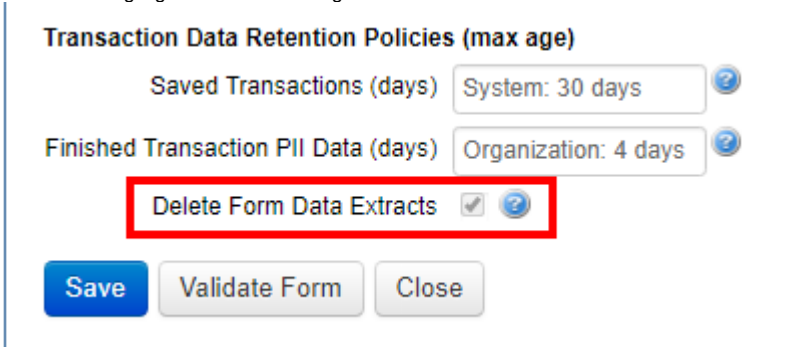
By default, a form follows, if defined, the organization data retention settings, otherwise the global data retention settings are followed. However, you can also customize the *Saved Transactions* and *Finished Transaction PII Data* on an individual form level. These settings then apply to all submissions for this form.

To edit the form data retention settings:

- Navigate to *Forms* from the TM menu bar, and then click *Forms* from the dropdown menu.
- Find and select the form from the list (either click the edit icon (  ) in the *Action* column or the link in the *Form Name* column).
- Switch to the *Details* tab.  
The data retention policies settings are in the *Transaction Data Retention Policies* section at the bottom of the displayed page. The screenshot below displays this section of the tab.



The above screenshot is an example for a *strict* data retention policy mode. Whereas an additional setting will be available for a *relaxed* mode, the *Delete Form Data Extracts*. This checkbox is highlighted in the following screenshot.



From the *Details* tab, if you wish to override the global and/or organization *Data Retention Management* settings, enter custom values for:

- Saved Transactions** – In the above screenshot, this setting will default to the global default (shown in gray). That is, *System: 30 days* is the active threshold. Another value can be entered in the *Saved Transactions* field but must not exceed the active threshold, when the *Enforce System/Org Thresholds* checkbox (in the *Retention Settings* tab) is ticked. In this case, you will not be able to enter an amount greater than 30 days.  
  
Note this setting can also be configured on the *Abandonment* tab.
- Finished Transaction PII Data** – In the above screenshot, this setting will default to the organization default (shown in gray). That is, *Organization: 4 days* is the active threshold. Another value can be entered into the *Finished Transaction PII Data* field. However, this value must not exceed the active threshold, when the *Enforce System/Org Thresholds* checkbox (in the *Retention Settings* tab) is ticked. In this case, you will not be able to enter an amount greater than 4 days.
- Delete Form Data Extracts** (only for *relaxed* mode) – This checkbox will normally be unticked for *relaxed* mode. In the above case, the related organization's corresponding *Delete Form Data Extracts* checkbox had been ticked and is defaulted at the form level (shown in gray). Once the *Delete Form Data Extracts* checkbox is ticked at an organization level, you cannot untick it at the form level. That is, the form level must abide by the stricter setting enforced at the organization level.

Whereas in the case of the *Delete Form Data Extracts* checkbox at the organization level being unticked, it is possible to make it stricter at the form level by selecting the *Delete Form Data Extracts* checkbox.

The default *relaxed* mode setting of the *Delete Form Data Extracts* checkbox being unticked, means that the data extracts will be purged at the same time as the finished transaction records, as per the *Finished Transactions* setting (in the *Retention Settings* tab). However, the stricter setting of ticked *Delete Form Data Extracts* checkbox, means that it will mimic the *strict* data retention policy of purging the form data extracts at the same time as purging the PII data, as per the *Finished Transaction PII Data* setting.

4. Click the *Save* button to save your changes. Once you have saved your changes, all forms of this organization will use these new override data retention settings instead of the global and/or organization corresponding settings.

# Data Retention Status (Manager v5.1)

Unknown macro: 'redirect'

## Page Contents:

- [Data Retention Status](#)
  - [Transactions Tab](#)
  - [Collaboration Jobs Tab](#)
  - [System Logs Tab](#)
  - [Top Table Sizes Tab \(for MySQL only\)](#)

## Data Retention Status

To help decide on data retention settings or see how they are working out, it is useful to see how much data is currently stored on the TM server. For your convenience, TM provides summaries on the data retention management page.

## Transactions Tab

To view a breakdown of transactions (excluding submissions associated with collaboration jobs):

1. Navigate to *System* from the TM menu bar, and then click *Data Retention Management* from the dropdown menu.
2. Switch to the *Transactions* tab.  
Switching to the *Transactions* tab will display a breakdown of transactions. The screenshot below displays an example of this breakdown.

**Data Retention Management**  
Home Dashboard > Data Retention Management

Form Status	Delivery Status	Oldest	Max Age	Records	Percentage
Abandoned	Completed	21 Mar 2017	153 days	8	1 %
Abandoned	Undeliverable	22 Feb 2017	180 days	367	39 %
Assigned				65	7 %
Completed	Completed	02 Jan 2017	230 days	117	13 %
Completed	Not Ready	23 Dec 2016	241 days	97	10 %
Completed	Not Required	02 Jan 2017	230 days	169	18 %
Completed	Ready	27 Feb 2017	175 days	89	10 %
Completed	Undeliverable	15 May 2017	98 days	3	0 %
Expired	Not Required			2	0 %
Opened	Not Ready	15 Jan 2017	217 days	8	1 %
Saved	Not Ready	30 Mar 2017	144 days	5	1 %
Submitted	Not Ready	31 Mar 2017	143 days	5	1 %
<b>Total Records</b>				<b>935</b>	

Close

Transactions are grouped by form status and delivery status. Note that only certain combinations of these statuses can be eligible for purging (form status *Completed* or *Abandoned*, and delivery status *Completed*, *Undeliverable* or *Not Required*).

Form Status	Explanation
Abandoned	This indicates transactions that have been abandoned by the user, or based on the data retention policy.
Completed	This indicates transactions that have been successfully submitted and contain all required data.
Opened	This indicates transactions that have been started by a user. When a transaction is created by a user (by starting a new form), the initial form status is opened. This status will be changed once the user saves, cancels, or submits the transaction.
Saved	This indicates transactions that have been saved by the user and/or automatically by the system.
Submitted (legacy feature)	This indicates transactions that have been submitted but may require additional information (attachments, payment, etc.). Once the required data is collected, the transaction status would change to <i>Completed</i> .  This is not very common for Maestro forms as all information, including attachments, payment, etc., are collected <b>prior</b> to the user submitting the form. Most Maestro forms would skip the <i>Submitted</i> status and be marked as <i>Completed</i> after the form is submitted by the user.

Explanation
-------------

## Related Pages:

- [Data Retention Management Overview \(Manager v17.10\)](#)
- [Data Retention Management Overview \(Manager v5.1\)](#)
- [Data Retention Policy Mode \(Manager v17.10\)](#)
- [Data Retention Policy Mode \(Manager v5.1\)](#)
- [Data Retention Schedule \(Manager v17.10\)](#)
- [Data Retention Schedule \(Manager v5.1\)](#)
- [Data Retention Status \(Manager v17.10\)](#)
- [Data Retention Status \(Manager v5.1\)](#)
- [Form Level Settings \(Manager v17.10\)](#)
- [Form Level Settings \(Manager v5.1\)](#)

Delivery Status	
Completed	This indicates that the transaction has been successfully delivered, based on the configured delivery channel.
Undeliverable	This indicates that delivery is not possible. Please check the error logs for further details of the error.
Not Ready	This indicates that the transaction is not ready for delivery yet. This is the start state before a transaction has been completed by the user.  Generally, the receipt render service will kick the transaction from this state to the Ready state when the receipt is rendered.
Not Required	This indicates that delivery is not required. It may be that this form is part of a collaboration job and the delivery is to be handled separately say as a consolidation of the transaction details from all the associated forms.
Ready	This indicates that the transaction is ready to be delivered. A transaction will be marked as <i>Ready</i> until the delivery channel is processed, or it may remain marked as <i>Ready</i> if a delivery channel is not configured.
In Progress	This indicates that delivery has been started but is waiting to be completed
Paused	This indicates that the transaction delivery is paused. The transaction will be pushed out of this status by some other means (Groovy Scheduled Task)
Error	This indicates that transaction delivery has failed and is waiting to be retried.
Sent Email	This indicates that secure email has been sent. System is waiting for the user to login and process the transaction

### Collaboration Jobs Tab

To see a breakdown of collaboration jobs, switch to the *Collaboration Jobs* tab.

Again, not all jobs are eligible for purging. Only collaboration jobs with a status of *Completed*, *Cancelled* and *Expired* are considered finished and subject to data retention times. The screenshot below displays an example of the *Collaboration Jobs* tab.

**Data Retention Management**  
Home Dashboard > Data Retention Management

Retention Settings | Transactions | **Collaboration Jobs** | System Logs

Job Type	Job Status	Oldest	Max Age	Records	Percentage
Form Bundle	In Progress	30 Oct 2015	194 days	13	19 %
Form Bundle	Completed	13 Jan 2016	118 days	29	43 %
Form Bundle	Cancelled	08 Apr 2016	32 days	4	6 %
Review & Approval	In Progress	20 Oct 2015	204 days	13	19 %
Review & Approval	Completed	24 Nov 2015	169 days	6	9 %
Review & Approval	Error	01 Feb 2016	99 days	2	3 %

Close

### System Logs Tab

To see a breakdown of the system logs, switch to the *System Logs* tab. The screenshot below displays an example of the *System Logs* tab.

## Data Retention Management

Home Dashboard > Data Retention Management

Data Type	Oldest	Max Age	Policy Max Age	Records
Transaction History	12 Oct 2015	548 days	730 days	43,322
Error Log	14 Oct 2016	180 days	180 days	6,551
Event Log	14 Oct 2016	180 days	180 days	158,785
Groovy Service Log	13 Mar 2017	30 days	30 days	17,670
T.Field Device Log	30 Mar 2017	13 days	30 days	101
T.Field Sync Log	30 Mar 2017	13 days	30 days	120
T.Field Sync Call	30 Mar 2017	13 days	30 days	5,440
Scheduled Job History	13 Mar 2017	30 days	30 days	142,303
Security Audit Log	12 Apr 2016	365 days	365 days	337,713
Security Manager Log	14 Mar 2017	29 days	30 days	6,794
User Login History	14 Oct 2016	180 days	180 days	5,474
Total Records				724,273

Close

### Top Table Sizes Tab (for MySQL only)

If your TM instance uses MySQL, you can see a breakdown of the largest database tables to help you assess how your system uses resources.

To view a breakdown of the largest database tables:

1. Navigate to *System* from the TM menu bar, and then click *Data Retention Management* from the dropdown menu.
2. Switch to the *Top Table Sizes* tab.

Switching to this tab will display a breakdown of the largest database tables. The screenshots below display an example of this breakdown.

# Data Retention Management

Home Dashboard > Data Retention Management

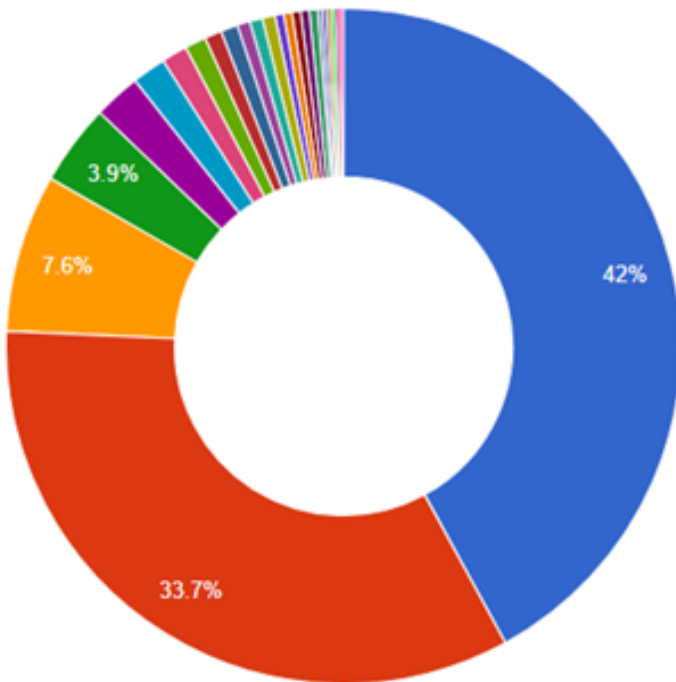
Retention Settings | Transactions | Collaboration Jobs | System Logs | **Top Table Sizes**

Table Name	Rows	Avg Row (KB)	Data (MB)	Indexes (MB)	Total (MB)	DB Percentage
Template Version Data	200	1,052.2	206	0	206	42.0 %
Library Resource Data	6,512	26.0	165	0	165	33.7 %
Portal Resource	508	73.6	37	0	37	7.6 %
Scheduled Job History	95,136	0.2	11	8	19	3.9 %
Audit Log	15,225	0.7	7	4	11	2.2 %
Library Resource History	461	16.7	8	0	8	1.6 %
Import Action Data	32	176.0	5	0	6	1.2 %
Portal Page	268	17.5	5	0	5	1.0 %
Library Resource	6,675	0.7	3	2	4	0.8 %
Error Log	102	41.3	4	0	4	0.8 %
Submission	1,017	2.7	1	1	3	0.6 %
Request Log	1,523	1.8	2	1	3	0.6 %
Service Parameter History	285	9.2	3	0	3	0.6 %
User Auth Event	2,842	0.7	2	0	2	0.4 %
Transaction History	768	2.2	1	1	2	0.4 %
Client Keystore	1,908	0.9	2	0	2	0.4 %
Service Parameter	455	3.4	1	0	2	0.4 %
Submission History Data	451	3.4	1	0	2	0.4 %
Event Log	488	2.3	1	0	1	0.2 %
<b>Total Size</b>			<b>465</b>	<b>17</b>	<b>485</b>	


Total Database Size: 493 MB

Close

## Top Table Sizes



# Data Retention Schedule (Manager v5.1)

 Unknown macro: 'redirect'

## Related Pages:

## Data Retention Schedule

Data retention is performed continually as part of the *Transaction Processor* service. This service is run throughout the day and helps keep data from accumulating. In addition, this service spreads out the load of data purging by running every 5 minutes and purging up to 500 records each time.

If required, it is possible to change the maximum number of records purged by altering the corresponding service parameter for the *Transaction Processor* service. Please consult Avoka Support if unsure.

- [Data Retention Management Overview \(Manager v17.10\)](#)
- [Data Retention Management Overview \(Manager v5.1\)](#)
- [Data Retention Policy Mode \(Manager v17.10\)](#)
- [Data Retention Policy Mode \(Manager v5.1\)](#)
- [Data Retention Schedule \(Manager v17.10\)](#)
- [Data Retention Schedule \(Manager v5.1\)](#)
- [Data Retention Status \(Manager v17.10\)](#)
- [Data Retention Status \(Manager v5.1\)](#)
- [Form Level Settings \(Manager v17.10\)](#)
- [Form Level Settings \(Manager v5.1\)](#)

# Triggering Data Retention (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Data Retention Management Overview \(Manager v17.10\)](#)
- [Data Retention Management Overview \(Manager v5.1\)](#)
- [Data Retention Policy Mode \(Manager v17.10\)](#)
- [Data Retention Policy Mode \(Manager v5.1\)](#)
- [Data Retention Schedule \(Manager v17.10\)](#)
- [Data Retention Schedule \(Manager v5.1\)](#)
- [Data Retention Status \(Manager v17.10\)](#)
- [Data Retention Status \(Manager v5.1\)](#)
- [Form Level Settings \(Manager v17.10\)](#)
- [Form Level Settings \(Manager v5.1\)](#)

## Triggering Data Retention

While TM continuously applies data retention policies, you can also trigger a data purge manually.

To trigger a data purge manually:

1. Navigate to *System* from the TM menu bar, and then select *Data Retention Management Services* from the dropdown menu.
2. Ensure you are on the *Retention Settings* tab (if not, switch to it).
3. Click *Apply Policy* (if you made changes to the policies, click the *Save* button first).

The screenshot displays the 'Data Retention Management' interface. At the top, there are tabs for 'Retention Settings', 'Transactions', 'Collaboration Jobs', and 'System Logs'. The 'Retention Settings' tab is active. Under 'Transaction Records (max age)', there is a checkbox for 'Enforce System / Org Thresholds' which is checked. Below it are input fields for 'Saved Transactions (days)' (30), 'Finished Transaction PI Data (days)' (7), 'Finished Transactions (days)' (180), and 'Finished Collaboration Jobs (days)' (180). Under 'System Logs (max age)', there are dropdown menus for various log types: 'Transaction History' (5 years), 'Email Queue' (30 days), 'Error Log' (180 days), 'Event Log' (180 days), 'Groovy Service Log' (30 days), 'Import Logs' (7 days), 'Security Audit Log' (1 year), 'Scheduled Job History' (30 days), 'TField App Logs' (30 days), and 'User Login History' (180 days). At the bottom, there are four buttons: 'Save', 'Apply Policy' (highlighted with a red box), 'Reset Defaults', and 'Close'.

TM will perform a data purge run like the *Transaction Processor* service and will return a message as to how many records were purged.

# Form Submission Categories (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Data Retention Management Overview \(Manager v17.10\)](#)
- [Data Retention Management Overview \(Manager v5.1\)](#)
- [Data Retention Policy Mode \(Manager v17.10\)](#)
- [Data Retention Policy Mode \(Manager v5.1\)](#)
- [Data Retention Schedule \(Manager v17.10\)](#)
- [Data Retention Schedule \(Manager v5.1\)](#)
- [Data Retention Status \(Manager v17.10\)](#)
- [Data Retention Status \(Manager v5.1\)](#)
- [Form Level Settings \(Manager v17.10\)](#)
- [Form Level Settings \(Manager v5.1\)](#)

## Form Submission Categories

To understand the data retention management settings that are available, we need to put it into the context of the transaction life cycle. There are three distinct categories a transaction can fall into when considering data retention:

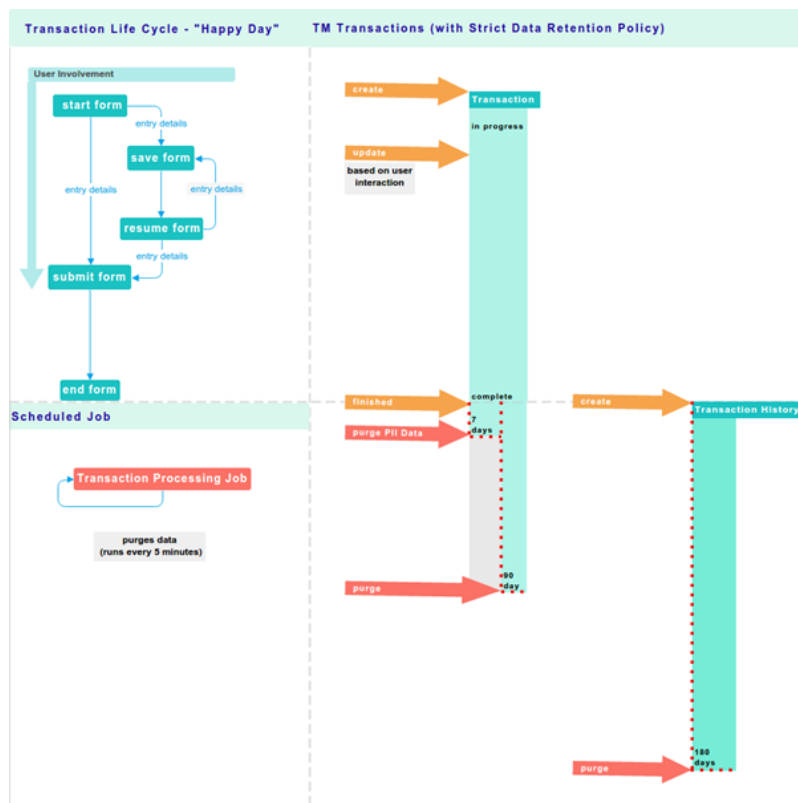
1. [Completed Transactions](#) (not part of a collaboration job)
2. [Abandoned Transactions](#) (not part of a collaboration job)
3. [Collaboration Job](#)

Data retention settings are the parameters for maintaining the data in TM, but it is the *Transaction Processing Job* that uses these parameters each time it runs every 5 minutes. Based on the data retention settings, the *Transaction Processing Job*.

- Abandons any transaction that is ready to be abandoned.
- Purges any data/transaction that is ready to be purged.

## Completed Transactions (not part of a collaboration job)

We will illustrate the transaction life cycle for a form submission that has been successfully completed. This is a “Happy Day” scenario where the user completes and submits a form within the allowed time frame which is based on the *Saved Transaction* data retention setting (30 days for strict policy).



The following explains the process as shown in the above diagram.

1. The form is started (opened) by the user and a transaction record is created. At this point the user may:
  - a. Complete and submit the form in one sitting or;
  - b. Save the form and return to it, subsequently completing and submitting it within the allowable timeframe.

Before submitting the form, the user can save and resume the form as many times as required. Each time the user resumes and saves the form, the timeframe allowed, based on the *Saved Transaction* data retention setting, begins from this save. That is, the user can return and submit the form prior to the 30 days (for strict policy) having elapsed from when it was last saved.

2. On submission, the form is processed and delivered to the backend system.
3. Once delivered, it is considered a finished transaction and a transaction history record is created.
4. From this point onwards, the transaction record and the transaction history record will be retained in Transact Manager according to the data retention settings.

- The *Finished Transaction PII Data* setting is used to determine when to remove PII data from the finished transaction. PII data makes up most of a submission's data footprint. By removing the PII data a brief time (7 days for strict policy) after a transaction has been completed, it has the following benefits:
  - Your TM database is leaner. The purge will remove submitted XML and attachment data.
  - All sensitive data is only available for a brief time.

When PII data has been deleted, the submission is still listed in *TM Form Transactions* (but the XML data cannot be viewed, and attachments cannot be downloaded anymore).

- The *Finished Transactions* setting is used to determine when to purge the completed transaction from the transaction record. For the strict policy, the transaction will be deleted 90 days after the transaction has finished.
- The *Transaction History* setting (in the *System Logs* section) is used to determine when to purge the related transaction history data. For the strict policy, the transaction history record will be deleted 180 days after the transaction has finished.

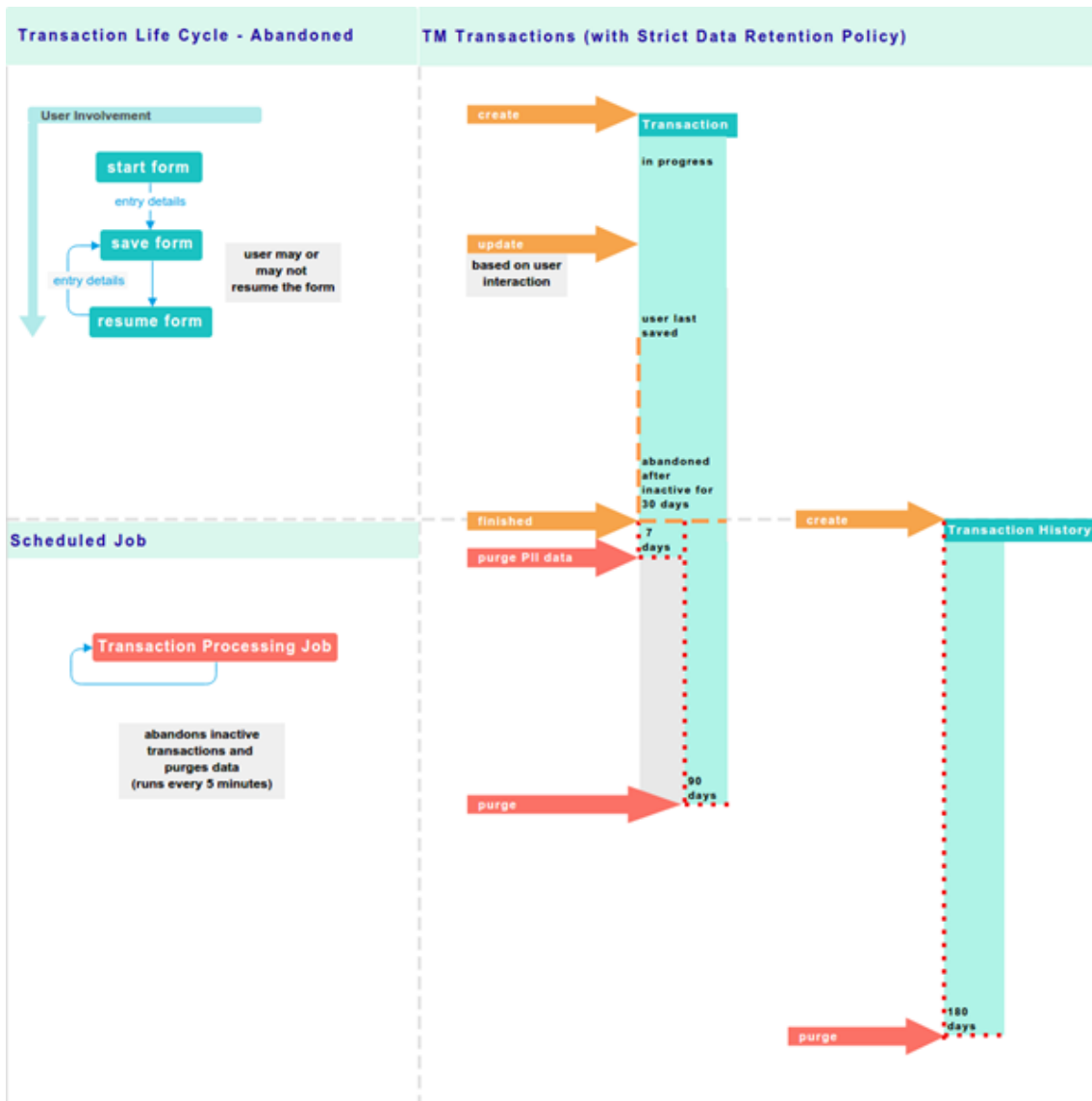
## Abandoned Transactions (not part of a collaboration job)

There are many ways that a transaction may be abandoned. These transactions can be abandoned:

- Explicitly by the user clicking the *Cancel* button or closing the browser or browser tab while still on the first page. Please note that some forms may automatically save the transaction as the user navigates between different pages. In this case, the form will temporarily be marked as *Saved*. If the user does not return to the form, and manually save or submit, it is marked as abandoned.
- Explicitly by an administrator canceling from the TM console (only when necessary).
- Automatically by a TM job, where a user:
  - Previously saved the form but did not resume it in a timely fashion.
  - Submitted the form but it remained incomplete, waiting for say missing attachments.
- Automatically by a form session timing out.
- Unintentionally by say some break in internet communication.

It is a balancing act to optimize conversion rates whilst keeping your database as lean as possible. As with the case of a saved form, it is hoped that the user will soon resume, complete and submit it. We advise that sufficient time is allowed for all users to resume their forms before automatically abandoning them. According to the strict policy, the *Saved Transactions* setting gives the user 30 days to return to a previously saved form.

We will illustrate an example where a transaction, that was previously saved, is abandoned automatically after a period of inactivity (based on the *Saved Transactions* setting).



The following explains the process as shown in the above diagram.

1. The form is started (opened) by the user and a transaction record is created.
2. The user saves the form with the intention of completing it later.
3. However, the user does not resume the form within the allowed time frame (30 days as per the *Saved Transactions* setting of the strict policy).
  - a. After the 30 days, TM automatically abandons the transaction.
  - b. An abandoned transaction is considered a *Finished Transaction*. At this stage, a transaction history record is created and the same data retention procedure applies like a successfully submitted and delivered (Completed Transaction) submission.

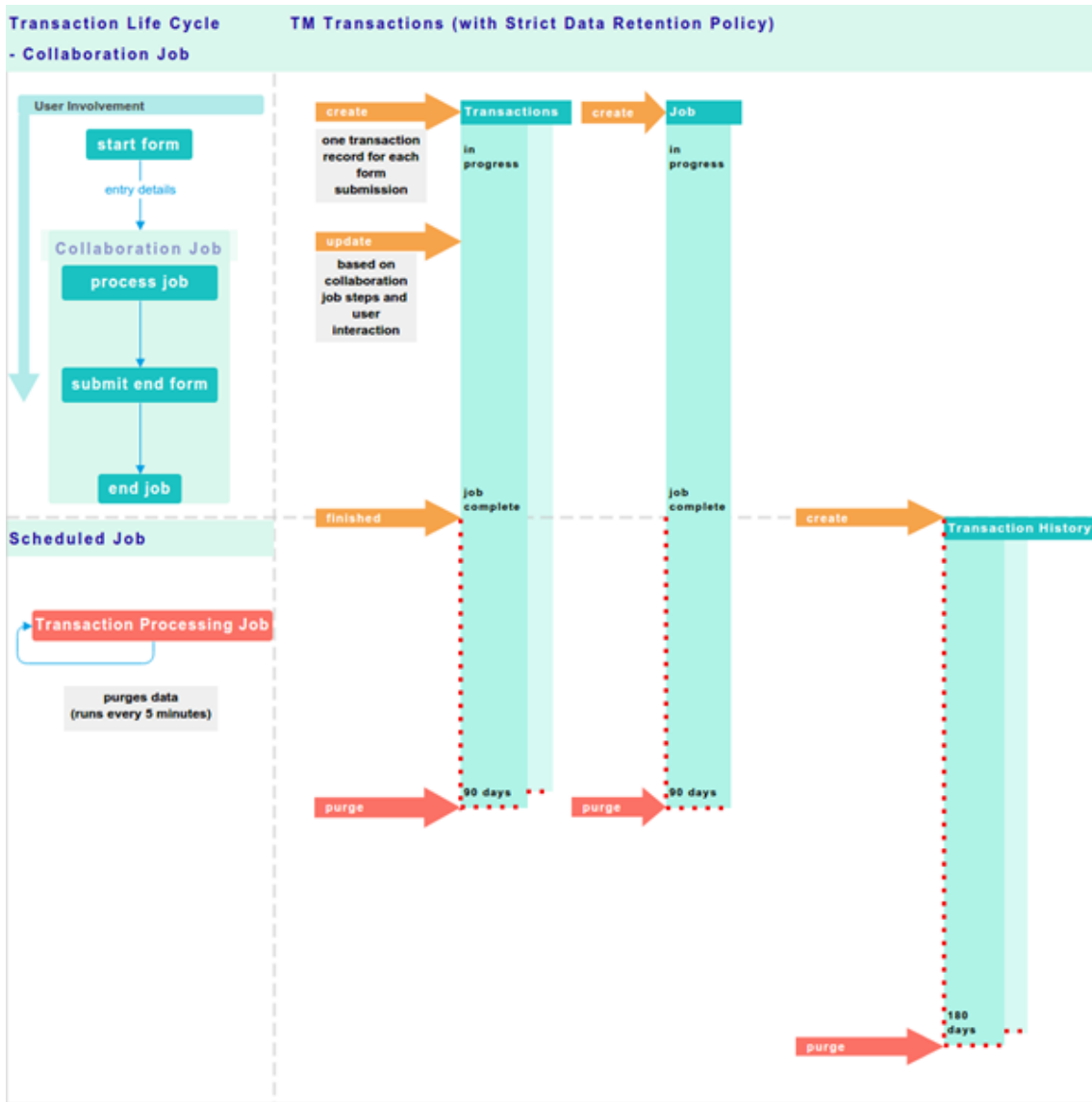
In most cases, abandoned transactions are deleted according to the *Finished Transactions* setting. The only exception is where a user opens the form and leaves it open without having saved it (this includes any background saving). In this case, the transaction is automatically abandoned one day after first opened and then it's deleted 2 days after being abandoned.

Data for abandoned submissions are delivered if the abandoned delivery channel is configured in TM.

## Collaboration Jobs

If a submission is part of a collaboration job, it is not purged as part of standard submission purging. Instead, TM uses the *Finished Collaboration Jobs* policy to purge the collaboration job and all its submissions, once the **entire** job has finished. It is important to emphasize here that, in contrast with a single form submit, a form submission that is part of a collaboration job is never automatically abandoned by TM.

We will illustrate the transaction life cycle for a collaboration job form submission that has been successfully completed.



The following explains the process as shown in the above diagram.

1. The form is started (opened) by the user and a transaction record is created. As this form involves a collaboration job, once the user submits the start form, it triggers the collaboration job processing which first creates a job record. This job record contains the job audit information and keeps track of all submissions related to the collaboration job.
2. One or more users who are involved interact as requested by the collaboration job. Typically, each user interaction is a separate submission reflected by creating a transaction record.
3. The last step is reached and the user responsible submits the end form.
4. On submission of the end form, the forms in the collaboration job are processed and delivered to the backend system.
5. Once delivered, it is considered a finished collaboration job reflected by a finished job record and a related set of one or more finished transactions. A transaction history record is now created for each of the finished transactions within the collaboration job.
6. From this point onwards, each transaction record and the corresponding transaction history record are retained in Transact Manager according to the data retention settings.
  - a. The *Finished Collaboration Jobs* setting is used to determine when to purge the job record and all its related completed transactions. For the strict policy, these are deleted 90 days after the collaboration job has finished.
  - b. The *Transaction History* setting (in the *System Logs* section) is used to determine when to purge the related transaction history data. For the strict policy, the transaction history records are deleted 180 days after the collaboration job has finished.

However, a collaboration job may also be canceled by a TM operations user. In this case, the incomplete job is marked as finished, and the same data retention procedure applies like a successfully completed job.

# Form Submission Data (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

## Form Submission Data

The *Form Submission Data* page lists the submission data extract values for a set of submissions in tabular form. The *Form Submission Data* page can be used to quickly review the extracted data for multiple submissions.

## View Form Submission Data

The *Form Submission Data* page is accessed through the *Operations* menu of Transact Manager. To view *Form Submission Data*:

1. Navigate to *Operations* from the *menu bar*.  
Navigating to *Operations* will display the *Operations* menu.
2. Select *Form Submission Data* from the *Operations* menu.  
Selecting *Form Submissions Data* will direct you to the *Form Submissions Data* page. The screenshot below displays an example of the *Form Submissions Data* page.

The screenshot shows the 'Form Submission Data' page with a search and filter interface at the top. Below the interface is a table with the following columns: ID, Tracking Code, Receipt Number, Time Submitted, Form Status, Device, First Name, Last Name, Phone Number, Email, Product Credit Cards, Product Insurance, and Action. The table contains six rows of data representing completed submissions.

ID	Tracking Code	Receipt Number	Time Submitted	Form Status	Device	First Name	Last Name	Phone Number	Email	Product Credit Cards	Product Insurance	Action
26709	ZBQK2B	inboard-customer-6	22 Oct 13:31	Completed	Desktop	Karl	Jones	6299999999	@evika.com	True	True	
26705	WRQH2Z	inboard-customer-5	22 Oct 13:29	Completed	Desktop	Sam	Jones	6299999999	@evika.com	True	True	
26699	CV7Z3E	inboard-customer-4	22 Oct 13:24	Completed	Desktop	Tom	Jones	6299999999	@evika.com	True	True	
26695	8A8WV9	inboard-customer-3	22 Oct 13:19	Completed	Desktop	Bill	Warner	6299999999	@evika.com	True	True	
26690	3J7STQ	inboard-customer-2	22 Oct 13:08	Completed	Desktop	Ben	Warner	6299999999	@evika.com	True	True	
26685	R3QK2H	inboard-customer-1	22 Oct 13:07	Completed	Desktop	Ben	Warner	6299999999	@evika.com	True	True	

# View Submitted Attachments (Manager v5.1)

Unknown macro: 'redirect'


## Related Pages:

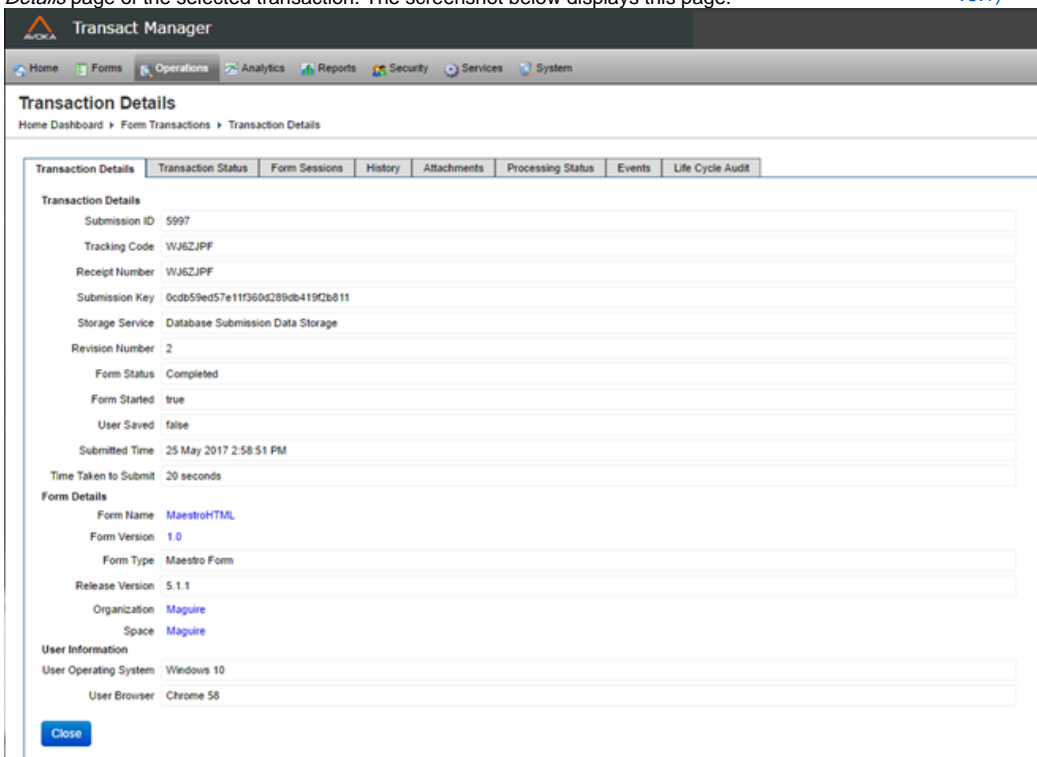
- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

## View Submitted Attachments

Once a form and its attachments have been submitted by an end-user, Transact Manager allows you to view the attachments to ensure that they are appropriate for what the form requires.

To view submitted attachments associated with a transaction:

1. Select *Operations* from the menu bar. Selecting this option will display the *Operations Menu*.
2. Select *Form Transactions* from the *Operations Menu*. Selecting this option will display a list of all transactions for all forms associated with your instance of Transact Manager.
3. Select the transaction that you want to view attachments for and click the *View Details* icon (  ). Use the search textbox to help you find the correct transaction. Selecting the transaction and clicking the *View Details* icon will direct you to the *Transaction Details* page of the selected transaction. The screenshot below displays this page.



**Transaction Details**

Home Dashboard > Form Transactions > Transaction Details

Transaction Details | Transaction Status | Form Sessions | History | Attachments | Processing Status | Events | Life Cycle Audit

**Transaction Details**

Submission ID 5997  
 Tracking Code WJ6ZJPF  
 Receipt Number WJ6ZJPF  
 Submission Key 0cd59ed57e11f3604289db4192b811  
 Storage Service Database Submission Data Storage  
 Revision Number 2  
 Form Status Completed  
 Form Started true  
 User Saved false  
 Submitted Time 25 May 2017 2:58:51 PM  
 Time Taken to Submit 20 seconds

**Form Details**

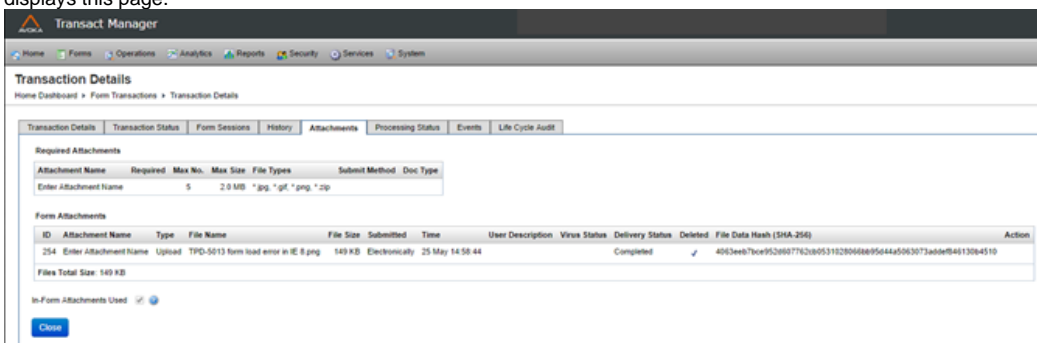
Form Name MaestroHTML  
 Form Version 1.0  
 Form Type Maestro Form  
 Release Version 5.1.1  
 Organization Maguire  
 Space Maguire

**User Information**

User Operating System Windows 10  
 User Browser Chrome 58

Close

4. Switch to the *Attachments* tab. Switching to this tab will direct you to the *Attachment Details* page. The screenshot below displays this page.



**Attachment Details**

Home Dashboard > Form Transactions > Transaction Details

Transaction Details | Transaction Status | Form Sessions | History | Attachments | Processing Status | Events | Life Cycle Audit



**Required Attachments**

Attachment Name	Required	Max No.	Max Size	File Types	Submit Method	Doc Type
Enter Attachment Name	5	2.0 MB	*.jpg; *.png; *.zip			

**Form Attachments**

ID	Attachment Name	Type	File Name	File Size	Submitted	Time	User Description	Virus Status	Delivery Status	Deleted	File Data Hash (SHA-256)	Action
254	Enter Attachment Name	Upload	TPD-5013 form load error in IE 8.png	149 KB	Electronically	25 May 14:58:44		Completed	Completed	✓	4053eeb7bc952807762b05313295688954445563073a6de84113084510	

Files Total Size: 149 KB

In-Form Attachments Used  

Close

The first table identifies all the attachments that are required to successfully submit the form. The second table identifies every attachment that has been submitted with the form. These attachments include both required and optional/additional attachments.

In some cases, Administrators may be able to download attachments from this page.



# Saved Transactions (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

## Saved Transactions

The *Saved Transactions* page displays a list of all the saved transactions of the selected TM environment.

### View Saved Transactions

To access and view the *Saved Transactions* page:

1. Navigate to *Operations* from the menu bar. Navigating to *Operations* will display the *Operations menu*.
2. Select *Saved Transactions* from the *Operations menu*. Selecting *Saved Transactions* will display the list of saved transactions associated with the selected TM environment. The screenshot below displays an example of the *Saved Transactions* page.

**Saved Transactions**  
Home Dashboard > Saved Transactions

search  Transaction Score  Space  Start Date: 08 Jul 2017 00:00 End Date:

ID	Tracking Code	Form	Org	Opened	Saved	Anon. User	User / Contact Email	% Complete	Transaction Score	Space	User's OS / Browser	Action
1951	NNYJKV5	One	Michewpaley	08 Aug 02 18	08 Aug 02 18	✓					Web Plug-in Mac OS 10 / Firefox 54	
1947	9FT2094H	Basic Incident Report	AndrewHaliday	03 Aug 15 29	03 Aug 15 29	✓					Web Plug-in iOS (iPhone) 10 / Mobile Safari 10	
1916	YLL12C2	Data Extract Mappings Begin	Dannel.ocasio	22 Jul 00 55	22 Jul 00 56	✓					Web Plug-in Windows 7 / Chrome 59	
1910	DZ585Z5	Credit Card Application	Knowledge	21 Jul 16 35	21 Jul 16 35	✓					Web Plug-in Windows 10 / Chrome 59	
1906	DQP54RD	Configuring a Form	Dannel.ocasio	21 Jul 06 26	21 Jul 06 27	✓					Web Plug-in Windows 7 / Chrome 59	


Export Data

The table below identifies and describes the options that are available for selection for each saved transaction.

Icon	Action
	<p><b>View receipt</b></p> <p>Click this icon to view the PDF receipt of the selected transaction.</p>
	<p><b>Open Saved Form</b></p> <p>Clicking this icon opens the saved form to allow an administrator to complete the form on behalf of the user. As this is a sensitive operation, this action is only available to administrators whose roles include the permission, <i>Submission Save Edit</i>.</p>

You can filter the list of *Saved Transactions* by *Space* or a *Date* (combination of *Start Date* and/or *End Date*).

# Abandoned Submissions (Manager v5.1)


 Unknown macro: 'redirect'

The content within this section covers information relating to abandoned submissions in Transact Manager.

Below you will find a list of topics within this section.

- [Abandoned Submissions Overview \(Manager v5.1\)](#)
- [View Abandoned Submissions \(Manager v5.1\)](#)
- [Configure Form Abandonment Settings \(Manager v5.1\)](#)
- [Manually Abandon Transaction \(Manager v5.1\)](#)
- [Change Form from Abandoned to Saved \(Manager v5.1\)](#)

# Abandoned Submissions Overview (Manager v5.1)

 Unknown macro: 'redirect'

## Related Pages:

## Abandoned Submissions Overview

Transactions can be abandoned by a user, by the system or by an administrator. There are many different circumstances that will result in a transaction being abandoned. Some examples of transactions being abandoned are:

- By a user clicking the *Cancel* button.
- By the system automatically (as part of a TM job), where a user starts a form and:
  - Leaves it open and the form session eventually times out.
  - Closes the browser or the browser tab and doesn't resume the form in the allowable time frame.
  - Saves it, but does not resume the form in the allowable time frame.
  - Submits it, but the form remains incomplete, waiting for additional information (e.g. attachments or payments requested outside of the form). This is not very common in recent versions of forms, as required information is collected before submission.
  - Internet connection issues are experienced.
- By an administrator changing the form status in TM (only when necessary).

After a transaction is abandoned it is also considered to be a completed transaction within Transact Manager. Once a transaction is abandoned then it is eligible to be purged.

- [Abandoned Submissions Overview \(Manager v17.10\)](#)
- [Abandoned Submissions Overview \(Manager v5.1\)](#)
- [Change Form from Abandoned to Saved \(Manager v17.10\)](#)
- [Change Form from Abandoned to Saved \(Manager v5.1\)](#)
- [Configure Form Abandonment Settings \(Manager v17.10\)](#)
- [Configure Form Abandonment Settings \(Manager v5.1\)](#)
- [Manually Abandon Transaction \(Manager v17.10\)](#)
- [Manually Abandon Transaction \(Manager v5.1\)](#)
- [View Abandoned Submissions \(Manager v17.10\)](#)
- [View Abandoned Submissions \(Manager v5.1\)](#)

# View Abandoned Submissions (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Abandoned Submissions Overview \(Manager v17.10\)](#)
- [Abandoned Submissions Overview \(Manager v5.1\)](#)
- [Change Form from Abandoned to Saved \(Manager v17.10\)](#)
- [Change Form from Abandoned to Saved \(Manager v5.1\)](#)
- [Configure Form Abandonment Settings \(Manager v17.10\)](#)
- [Configure Form Abandonment Settings \(Manager v5.1\)](#)
- [Manually Abandon Transaction \(Manager v17.10\)](#)
- [Manually Abandon Transaction \(Manager v5.1\)](#)
- [View Abandoned Submissions \(Manager v17.10\)](#)
- [View Abandoned Submissions \(Manager v5.1\)](#)

## Abandoned Submissions

The *Abandoned Transactions* page lists the transactions that have been abandoned by form users, administrators or the TM system. A transaction is said to be abandoned when it is opened by a form user but never completed and/or submitted. This list also allows TM administrators to make abandoned transactions into saved ones. The following information is displayed for each abandoned transaction.

- The Transaction *ID*
- The *Tracking Code*
- The Name of the form
- The Organization associated with the form
- The time and date of the user's last activity with the transaction
- The name of the user/contact email of the user
- The identification if the form user is anonymous (represented by a tick ( ))
- The Abandonment Type
- The Abandonment reason (if known)

## View Abandoned Submissions

Transact Manager provides a list of abandoned submissions, which includes submissions abandoned by users cancelling the form, by administrators updating the transaction status to abandoned and by the system abandoning transactions that have been left incomplete for a time that exceeds the allowable time frame as configured in TM.





You can access the list of abandoned submissions by:

1. Select *Operations*
2. Click *Abandoned Transactions*

### Abandoned Transactions

Home Dashboard > Abandoned Transactions

search  Transaction Score  Start Date 15 Aug 2017 00:00     
Space  Abandonment Type  End Date

ID	Tracking Code	Form	Org.	Last User Activity	Anon. User	User / Contact Email	% Complete	Transaction Score	Abandon Type	Abandon Reason	Action
124	BC9KN7D	Credit Card Application	AFG	15 Sep 14:45	✓				Administrator		 
120	VZ2KR5Y	Credit Card Application	AFG	15 Sep 14:39	✓				User	Out of Time	 
108	KMKFZXR	Credit Card Application	AFG	01 Sep 17:09	✓				System		

< > [Export Data](#)

The *Abandoned Transactions* list displays details about the transaction. You can use the filter options at the top of the window to view specific abandoned transactions.


The *Abandon Type* column displays either *User*, *System*, or *Administrator* for each transaction.

*User*: This indicates that the user explicitly abandoned the submission by clicking the *Cancel* button in the form. When the user cancels the form, they will have the option to provide a reason for ending the transaction, this is noted in the *Abandon Reason* column.

*System*: This indicates that the system abandoned the transaction. A system abandons a transaction when one of the following happens:

- The form session times out.
- The user closes the browser window or tab without saving the transaction.
- The user has saved the transaction, but did not resume the form in the allocated amount of time based on the data retention policy. See the *Saved Transactions* option in the Data Retention Management policy for more information.

*Administrator*: This indicates that an administrator or operations user in TM transaction has manually updated the form status to *Abandoned*. See *Manually Abandon Transaction* section for more information.

If submission data is available, you can revert the submission into a *Saved* status (e.g. if the original submitter would like to complete the submission now) by using the *Make Abandoned Transaction Saved* action (.

You can also view the receipt by using the *View Receipt* action () next to the listed transaction.

# Configure Form Abandonment Settings (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Abandoned Submissions Overview \(Manager v17.10\)](#)
- [Abandoned Submissions Overview \(Manager v5.1\)](#)
- [Change Form from Abandoned to Saved \(Manager v17.10\)](#)
- [Change Form from Abandoned to Saved \(Manager v5.1\)](#)
- [Configure Form Abandonment Settings \(Manager v17.10\)](#)
- [Configure Form Abandonment Settings \(Manager v5.1\)](#)
- [Manually Abandon Transaction \(Manager v17.10\)](#)
- [Manually Abandon Transaction \(Manager v5.1\)](#)
- [View Abandoned Submissions \(Manager v17.10\)](#)
- [View Abandoned Submissions \(Manager v5.1\)](#)

## Configure Form Abandonment Settings

Abandonment settings can be customized at the form level. To configure these settings:

- Navigate to the Form Dashboard  
This can be done through the Forms menu, or from the recent forms list on the Home Dashboard.
- Switch to the *Abandonment* tab  
This will display the *Form Abandonment Settings*.

Dashboard | Details | Flow Config | Email Verification | Form Versions | **Abandonment** | Page Tracking | Spaces

Configure the Form Abandonment settings.

Saved Transactions (days) System: 30 days

**Abandoned Transaction Delivery**

Abandoned Delivery Channel

Minimum Transaction Score

No User Activity in Form Max Time

Submitted Transactions Max Time

Save Close

The list below explains each of the Abandonment settings that can be configured from the *Abandonment* tab.

- Saved Transaction (Days)** – This setting allows you to specify the maximum age of a saved transaction. When a saved transaction reaches this maximum age it is marked as *Abandoned* by the system. The maximum age is based on the number of days a form has been untouched since being last saved.
- Abandoned Delivery Channel** – This dropdown allows you to select one of the organization's delivery channels that is used to deliver abandoned transactions. By selecting a delivery channel from this dropdown, the following fields are enabled and ready to be customized:
  - Minimum Transaction Score** – This setting allows you to specify a minimum value representing how much of the form must be filled in for it to be delivered to the abandoned delivery channel. That is, a transaction score is a numerical value calculated by the form to indicate how much of the form was filled in. If you would like only submissions that exceed a certain transaction score to be delivered, enter the minimum transaction score into this field.
  - No User Activity in Form Max Time** – This dropdown lets you select the period after which anonymous transactions that have been background saved and untouched by a user, will be marked as abandoned.
  - Submitted Transactions Max Time** – From this dropdown, select the maximum age before a submitted but incomplete (missing attachments) transaction will be marked as abandoned.

# Manually Abandon Transaction (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Abandoned Submissions Overview \(Manager v17.10\)](#)
- [Abandoned Submissions Overview \(Manager v5.1\)](#)
- [Change Form from Abandoned to Saved \(Manager v17.10\)](#)
- [Change Form from Abandoned to Saved \(Manager v5.1\)](#)
- [Configure Form Abandonment Settings \(Manager v17.10\)](#)
- [Configure Form Abandonment Settings \(Manager v5.1\)](#)
- [Manually Abandon Transaction \(Manager v17.10\)](#)
- [Manually Abandon Transaction \(Manager v5.1\)](#)
- [View Abandoned Submissions \(Manager v17.10\)](#)
- [View Abandoned Submissions \(Manager v5.1\)](#)

## Manually Abandon Transaction

A TM administrator may need to manually abandon a form transaction. Transaction abandonment is generally handled by TM, but it may be necessary for an administrator to abandon a transaction. For instance, to prevent the user from accessing a transaction.

Only transactions with a *Form Status* of *Opened*, *Saved* or *Submitted* can be abandoned by the following steps below:

1. Navigate to the *Transaction Details* screen for the transaction you want to abandon. This can be done in one of the following ways:
  - a. *Operations > Form Transactions > Select the ID or Tracking Code*
  - b. *Operations > Saved Transactions > Select the ID or Tracking Code (for a saved transaction)*
  - c. *Forms > Form > Select the related form > Select the ID or Receipt Number in the Latest Transactions section*
2. Switch to the *Transaction Status* tab
3. Select *Abandoned* from the *Form Status* dropdown

Transaction Details	Transaction Status	Form Sessions	History
<b>User Transaction Flow Steps</b>			
Form Opened Time	31 Aug 2017 10:12:37 PM		
Form Saved Time	31 Aug 2017 10:15:19 PM		
Last User Activity Time	31 Aug 2017 10:15:19 PM		
Form Status	Saved		
Authentication Status	Saved		
<b>Transaction Data Delivery</b>			
Delivery Status	Abandoned		
<b>Transaction Data Purging</b>			
Scheduled Save Abandon Time	30 Sep 2017 10:15:19 PM		
<input type="button" value="Save"/> <input type="button" value="Close"/>			

4. Click the *Save* button to keep your changes  
The transaction will now be moved to the *Abandon Transactions* list.

# Change Form from Abandoned to Saved (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Abandoned Submissions Overview \(Manager v17.10\)](#)
- [Abandoned Submissions Overview \(Manager v5.1\)](#)
- [Change Form from Abandoned to Saved \(Manager v17.10\)](#)
- [Change Form from Abandoned to Saved \(Manager v5.1\)](#)
- [Configure Form Abandonment Settings \(Manager v17.10\)](#)
- [Configure Form Abandonment Settings \(Manager v5.1\)](#)
- [Manually Abandon Transaction \(Manager v17.10\)](#)
- [Manually Abandon Transaction \(Manager v5.1\)](#)
- [View Abandoned Submissions \(Manager v17.10\)](#)
- [View Abandoned Submissions \(Manager v5.1\)](#)

## Change Form from Abandoned to Saved

There are two ways that a TM administrator can change a transaction from abandoned to saved.

### Option 1:

1. Navigate to the *Transaction Details* screen for the transaction you want to abandon. This can be done in one of the following ways:
  - a. *Operations > Form Transactions > Select the ID or Tracking Code*
  - b. *Operations > Abandoned Transactions > Select the ID or Tracking Code*
  - c. *Forms > Form > Select the related form > Select the ID or Receipt Number in the Latest Transactions section*
2. Switch to the *Transaction Status* tab
3. Select *Saved* from the *Form Status* dropdown

The screenshot shows the 'Transaction Status' tab with the following details:

- User Transaction Flow Steps:**
  - Form Opened Time: 31 Aug 2017 10:12:37 PM
  - Form Saved Time: 31 Aug 2017 10:15:19 PM
  - Last User Activity Time: 31 Aug 2017 10:15:19 PM
  - Form Status: Saved (dropdown menu is open)
  - Authentication Status: Saved
  - Transaction Data Delivery:
    - Delivery Status: Abandoned
  - Transaction Data Purging:
    - Scheduled Save Abandon Time: 30 Sep 2017 10:15:19 PM
- Buttons: Save, Close

4. Click the *Save* button to keep your changes. The transaction will now be moved from the *Abandoned Transactions* list to the *Saved Transactions* list.

### Option 2:

1. Navigate to the *Abandoned Transaction* window (*Operations > Abandoned Transactions*)
2. Click the *Make Abandoned Transaction Saved* icon (🔄) under the *Action* column for the transaction.

**Abandoned Transactions**  
Home Dashboard > Abandoned Transactions

search  Transaction Score  Start Date 15 Aug 2017 00:00

Space  Abandonment Type  End Date

ID	Tracking Code	Form	Org.	Last User Activity	Anon. User	User / Contact Email	% Complete	Transaction Score	Abandon Type	Abandon Reason	Action
124	BC9KN7D	Credit Card Application	AFG	15 Sep 15:24	✓				Administrator		
120	V22KRSY	Credit Card Application	AFG	15 Sep 14:39	✓				User	Out of Time	
108	KMKFZXR	Credit Card Application	AFG	01 Sep 17:09	✓				System		

3. Click the *OK* button to confirm that you want to make the change to the form status. The form is moved from the *Abandoned Transactions* list to the *Saved Transactions* list.

# Form Requests Log (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

## Page Contents:

- [Form Requests Log](#)
- [View the Form Requests Log](#)

## Form Requests Log

The *Form Requests Log* documents information about user requests for forms and receipts. For example, whenever a user clicks on a link to open a form, an entry in the *Form Requests Log* is created. Viewing the *Form Requests Log* can be great when addressing issues with transactions. Each entry in the log contains the following information.

- The Transaction Request ID
- The Name of the form
- The organization associated with the form
- The time that the request was made
- The render mode – Either Form or Receipt. The render mode refers to the task that was requested by the user (either a form request or receipt request)
- The size of the request (in KB)
- The amount of time (in milliseconds) it took for the server to prepare the request
- The amount of time (in milliseconds) it took for the server to load the request
- The amount of time (in milliseconds) it took for the server to render the request
- The **total** amount of time (in milliseconds) it took from the request being made to the request being rendered to the user.

## View the Form Requests Log

To view the *Form Requests Log*:

1. Navigate to *Operations* from the menu bar. Navigating to *Operations* will display the *Operations* menu.
2. Select *Form Requests* from the *Operations* menu. The screenshot below displays an example of the *Form Requests Log*.

**Form Requests**  
Home Dashboard > Form Requests

Form Name  Version  Start Date 07 Jul 2017 00:00

Render Mode  Receipt Mode  End Date

ID	Form Name	Org.	Time	Version	Render Mode	TM Server	Form Server	Size (KB)	Prepare (ms)	Render (ms)	Load (ms)	Total (ms)	Action
108	Credit Card Application	AFG	13 Jul 20 27	2	Form	ip-192-168-90-249.us-west-2...		472 / 472	181	45	5	231	
106	Credit Card Application	AFG	12 Jul 23 09	2	Form	ip-192-168-90-249.us-west-2...		472 / 472	578	41	1	620	

[Export Data](#)

You can filter the request log by Render Mode, Date or Receipt Mode.

There are two options to filter by render mode.

- *Form*
- *Receipt*

There are three options to filter by receipt mode. This mode is only applicable for receipt render requests.

- *Web* - A *Web* receipt mode refers to a receipt that has been requested by a user using a Web Browser such as Chrome.
- *Delivery* - A *Delivery* receipt mode refers to a receipt that has been generated during the submission delivery process.
- *Email* - An *Email* receipt mode refers to a form user requesting an email copy of the receipt.

You can also export the search results to Excel by clicking the *Export Data* link below the table.

The table below identifies and describes each of the actions available for each entry in the *Form Requests Log*.

Icon	Action
	Clicking the <i>View</i> icon will direct you to the <i>Form Request Details</i> page and display additional details pertaining to the selected request. This page documents the <i>Request Key</i> of the selected transaction. The <i>Request Key</i> is an alternate key that uniquely identifies the request. This key, as opposed to the Request ID, is not generated by the database and will, therefore, persist throughout database migrations.
	Clicking the <i>View Submission Details</i> icon will direct you to the <i>Transaction Details</i> page. This is the related submission of this form request.



Clicking the *View Form Details* page will direct you to the Dashboard of the form associated with the selected transaction.

# Form Rendering Metrics (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Data Extract \(Manager v17.10\)](#)
- [Form Data Extract \(Manager v5.1\)](#)
- [Form Rendering Metrics \(Manager v17.10\)](#)
- [Form Rendering Metrics \(Manager v5.1\)](#)
- [Form Requests Log \(Manager v17.10\)](#)
- [Form Requests Log \(Manager v5.1\)](#)
- [Form Sessions \(Manager v17.10\)](#)
- [Form Sessions \(Manager v5.1\)](#)
- [Form Submission Data \(Manager v17.10\)](#)
- [Form Submission Data \(Manager v5.1\)](#)

## Page Contents:

- [Form Rendering Metrics](#)
- [View Form Rendering Metrics](#)

## Form Rendering Metrics

The *Form Rendering Metrics* page provides an overview of the speed that forms are rendering. The page does this by displaying metrics in a table. These metrics relate to the selected criteria that an administrator can apply. For instance, you may wish to view the metrics based on a specific form over a specific time period.

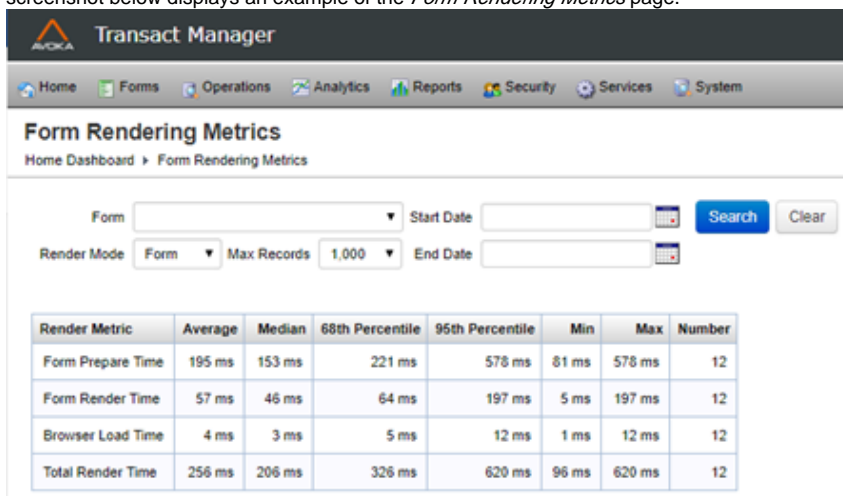
The *Form Rendering Metrics* table displays the following metric information.

- Render Metric – The following are the metrics that are measured and displayed in this table.
  - Form Prepare Time – This metric is based on the amount of time it takes to prepare the render request.
  - Form Render Time – This metric is based on the amount of time it takes to render the form request on to the server.
  - Browser Load Time – This metric is based on the time it takes to stream the rendered form to the user's browser.

## View Form Rendering Metrics

The *Form Rendering Metrics* page is accessed through the *Operations* menu of Transact Manager. To view *Form Rendering Metrics*:

1. Navigate to *Operations* from the *menu bar*.  
Navigating to *Operations* will display the *Operations* menu.
2. Select *Form Rendering Metrics* from the *Operations* menu.  
Selecting *Form Rendering Metrics* will direct you to the *Form Rendering Metrics* page. The screenshot below displays an example of the *Form Rendering Metrics* page.



Render Metric	Average	Median	68th Percentile	95th Percentile	Min	Max	Number
Form Prepare Time	195 ms	153 ms	221 ms	578 ms	81 ms	578 ms	12
Form Render Time	57 ms	46 ms	64 ms	197 ms	5 ms	197 ms	12
Browser Load Time	4 ms	3 ms	5 ms	12 ms	1 ms	12 ms	12
Total Render Time	256 ms	206 ms	326 ms	620 ms	96 ms	620 ms	12

Each column (except for *Number*) of the Form Rendering Metrics tab is measured in milliseconds (ms).

# Analytics and Reports (Manager v5.1)


 Unknown macro: 'redirect'

The content within this section covers information relating to analytics and reports available in Transact Manager.

Below you will find a list of topics within this section.

- [Charts and Analytics \(Manager v5.1\)](#)
- [Form A/B Testing \(Manager v5.1\)](#)

# Charts and Analytics (Manager v5.1)

 Unknown macro: 'redirect'

The content within this section covers information relating to charts and analytics in Transact Manager.

Transact Manager provides numerous charts for displaying key information regarding transactions. For a quick overview of transactions and form requests, Transact Manager provides a *Transaction Trend Chart*.


For more extensive analytics, the Transact platform offers the [Insights](#) module.

Below you will find a list of topics within this section.

- [Transaction Trend Charts \(Manager v5.1\)](#)
- [The Submission Trend Chart \(Manager v5.1\)](#)
- [The Referer Submissions Pie Chart \(Manager v5.1\)](#)
- [The Browser Submissions Pie Chart \(Manager v5.1\)](#)
- [The Operating System Submissions Pie Chart \(Manager v5.1\)](#)
- [Forms Activity Chart \(Manager v5.1\)](#)
- [Form Submissions Pie Chart \(Manager v5.1\)](#)

## Avoka Transact Reporting Options

[Avoka Transact Reporting Options](#) from [Avoka](#) on [Vimeo](#).

 Unknown macro: 'disable-content-rating-macro'

# Transaction Trend Charts (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Submissions Pie Chart \(Manager v17.10\)](#)
- [Form Submissions Pie Chart \(Manager v5.1\)](#)
- [Forms Activity Chart \(Manager v17.10\)](#)
- [Forms Activity Chart \(Manager v5.1\)](#)
- [The Browser Submissions Pie Chart \(Manager v17.10\)](#)
- [The Browser Submissions Pie Chart \(Manager v5.1\)](#)
- [The Operating System Submissions Pie Chart \(Manager v17.10\)](#)
- [The Operating System Submissions Pie Chart \(Manager v5.1\)](#)
- [The Referrer Submissions Pie Chart \(Manager v17.10\)](#)
- [The Referrer Submissions Pie Chart \(Manager v5.1\)](#)

## Page Contents:

- [Transaction Trend Charts](#)
- [View Transaction Trend Charts](#)

## Transaction Trend Charts

The *Transaction Trend* charts page consists of several charts displaying transaction trends in relation to conversion rate (the percentage of transactions that were completed and submitted by users).

## View Transaction Trend Charts

The *Transaction Trends* charts page is accessed through the *Analytics* menu of Transact Manager. To view the *Transaction Trend* charts:

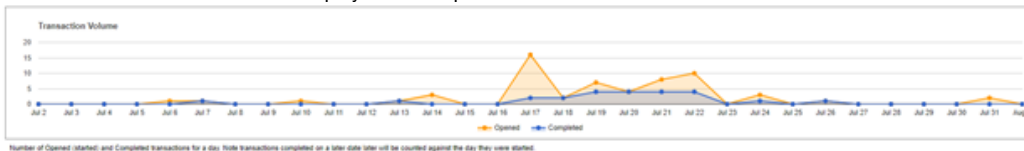
1. Navigate to *Analytics* from the menu bar. Navigating to *Analytics* will display the Analytics menu.
2. Select *Transaction Trend* from the *Analytics* menu. The screenshots below display examples of the *Transaction Trend* charts.

All *Transaction Trend* charts can be filtered by form, space, device type and/or date range (will initially be set to one month).

All charts on the *Transaction Trend* charts page plot a daily value on the x-axis. When the selected date range, screen size, and resolution tries to accommodate too many days (daily values) for the screen display, the x-axis will display as if it is plotted for every two or more days (depending on the size of the screen). However, by hovering over specific points plotted on any of the graphs, you will be able to see an exact daily figure for volume/percentage rate/time. To improve the readability of graphs, we advise that you restrict filtering to shorter date ranges.

## The following charts make up the *Transaction Trend* charts page:

- **Transaction Volume** – This chart displays the daily volume of opened (but not yet completed) and completed transactions plotted individually during the selected date range based on filter selections. The screenshot below displays an example of the *Transaction Volume* chart.



- **Completion Rate (%)** – This chart displays the daily percentage rate of all transactions that were completed during the selected date range based on filter selections. The screenshot below displays an example of the *Completion Rate (%)* chart.



- **Form Abandonment Rate (%)** – This chart displays the daily percentage of all transactions that were opened and then abandoned (never completed or submitted) by form users during the selected date range based on filter selections. The graph shows the abandonment rates plotted individually as a percentage breakdown by the following types of form abandonment:
  - **Ineligible** – the form determined that the user was not eligible to complete the transaction, and the transaction was terminated.
  - **User Cancelled** – the user explicitly clicked on the *Cancel* form button. Note that not all form designs have this button. This information becomes available immediately.
  - **User Saved** – the user has explicitly saved the form and then closed it but has never returned to resume the form. This type of abandonment is determined over time.
  - **Form Started** – the user has started interacting with the form (entering data, clicking on buttons or navigating around) but they never perform an explicit save or submit.

The screenshot below displays an example of the *Form Abandonment Rate* chart.



- **Bounce Rate (%)** – This chart displays the daily percentage of transactions that were bounced (opened and viewed by a form user but never started) in the selected date range and based on filter selections. The screenshot below displays an example of the *Form Bounce Rate (%)* chart.



- **Median Form Completion Time (mins)** – This chart displays the daily median amount of time (in minutes) it took for transactions to be completed (potentially across multiple form sessions) during the selected date range and based on other filter selections. The screenshot below displays an example of the *Median Form Completion Time (mins)* chart.



You may also export the transact history data (based on your filter selections) to a CSV file by clicking the



# The Submission Trend Chart (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Submissions Pie Chart \(Manager v17.10\)](#)
- [Form Submissions Pie Chart \(Manager v5.1\)](#)
- [Forms Activity Chart \(Manager v17.10\)](#)
- [Forms Activity Chart \(Manager v5.1\)](#)
- [The Browser Submissions Pie Chart \(Manager v17.10\)](#)
- [The Browser Submissions Pie Chart \(Manager v5.1\)](#)
- [The Operating System Submissions Pie Chart \(Manager v17.10\)](#)
- [The Operating System Submissions Pie Chart \(Manager v5.1\)](#)
- [The Referrer Submissions Pie Chart \(Manager v17.10\)](#)
- [The Referrer Submissions Pie Chart \(Manager v5.1\)](#)

## Page Contents:

- [The Submission Trend Chart](#)
- [View Submission Trend Chart](#)

## The Submission Trend Chart

The *Submission Trend* chart displays the number of form requests compared to the number of completed submissions for each month during the selected date range. The *Submission Trend* chart is great for a quick visual representation of the difference between the number of monthly form requests, and the total number of monthly submissions within a selected date range.

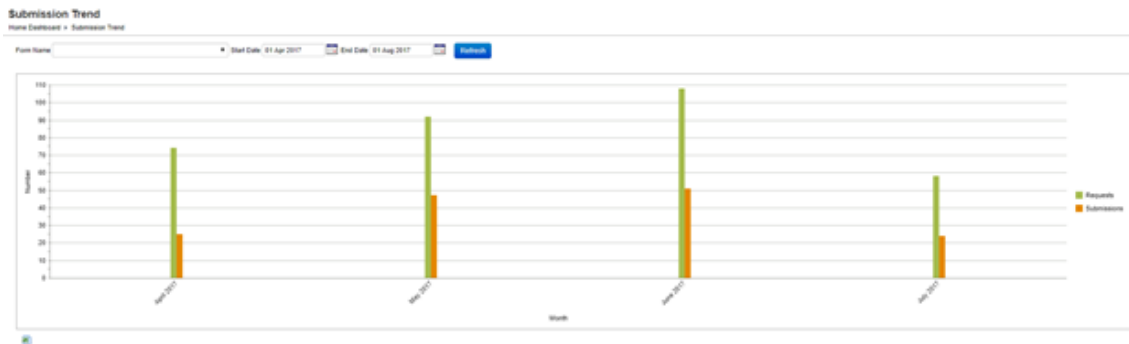
You may choose to view the submission trend by a selected form.


## View Submission Trend Chart

The *Submission Trend* chart is accessed through the *Analytics* menu of Transact Manager. To view the *Submission Trend* chart:

1. Navigate to *Analytics* from the menu bar.  
Navigating to *Analytics* will display the Analytics menu.
2. Select *Submission Trend* from the *Analytics* menu.  
The screenshot below displays an example of the *Submission Trend* chart.

This chart can be filtered by form and/or date range (will initially default to one year up to the current date).



You may also export the submission trend data (based on your filter selections) to an XLS file by clicking the  icon.

# The Referer Submissions Pie Chart (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Submissions Pie Chart \(Manager v17.10\)](#)
- [Form Submissions Pie Chart \(Manager v5.1\)](#)
- [Forms Activity Chart \(Manager v17.10\)](#)
- [Forms Activity Chart \(Manager v5.1\)](#)
- [The Browser Submissions Pie Chart \(Manager v17.10\)](#)
- [The Browser Submissions Pie Chart \(Manager v5.1\)](#)
- [The Operating System Submissions Pie Chart \(Manager v17.10\)](#)
- [The Operating System Submissions Pie Chart \(Manager v5.1\)](#)
- [The Referer Submissions Pie Chart \(Manager v17.10\)](#)
- [The Referer Submissions Pie Chart \(Manager v5.1\)](#)

## Page Contents:

- [The Referer Submissions Pie Chart](#)
- [View Referer Submissions Pie Chart](#)

## The Referer Submissions Pie Chart

The *Referer Submissions* pie chart illustrates the top referer URLs used by form users. A referer URL is a URL that is used by a form user to navigate/access a form.

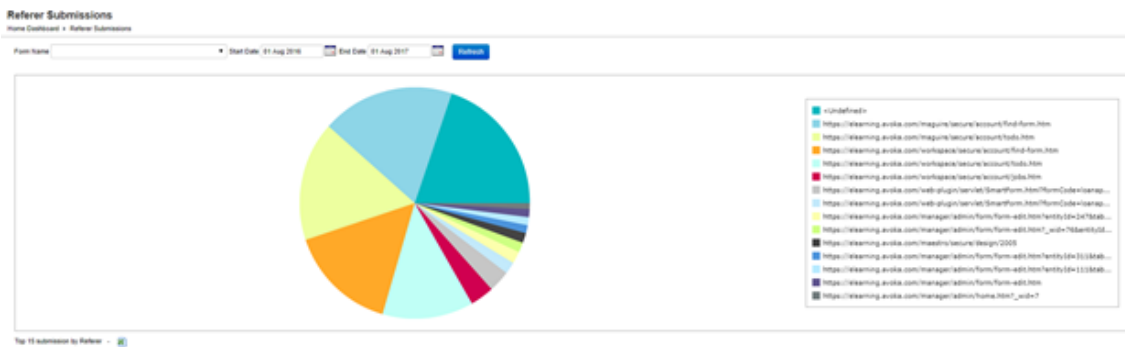
## View Referer Submissions Pie Chart


To view the *Referer Submissions* pie chart:

1. Navigate to *Analytics* from the menu bar.  
Navigating to *Analytics* will display the Analytics menu.
2. Select *Referer Submissions* from the *Analytics* menu.

The screenshot below displays an example of the *Referer Submissions* pie chart.

You can filter the data represented on the pie chart by using the *Form Name* dropdown (to only see referer URLs for a specific form), or by changing the date range (initially defaulted to one year up to the current date).



You may also export the referer submissions data (based on your filter selections) to an XLS file by clicking the  icon.

# The Browser Submissions Pie Chart (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Submissions Pie Chart \(Manager v17.10\)](#)
- [Form Submissions Pie Chart \(Manager v5.1\)](#)
- [Forms Activity Chart \(Manager v17.10\)](#)
- [Forms Activity Chart \(Manager v5.1\)](#)
- [The Browser Submissions Pie Chart \(Manager v17.10\)](#)
- [The Browser Submissions Pie Chart \(Manager v5.1\)](#)
- [The Operating System Submissions Pie Chart \(Manager v17.10\)](#)
- [The Operating System Submissions Pie Chart \(Manager v5.1\)](#)
- [The Referrer Submissions Pie Chart \(Manager v17.10\)](#)
- [The Referrer Submissions Pie Chart \(Manager v5.1\)](#)

## Page Contents:

- [The Browser Submissions Pie Chart](#)
- [View Browser Submissions Pie Chart](#)

## The Browser Submissions Pie Chart

The *Browser Submissions* pie chart identifies and displays the top internet browsers and their versions used by form users to submit forms.

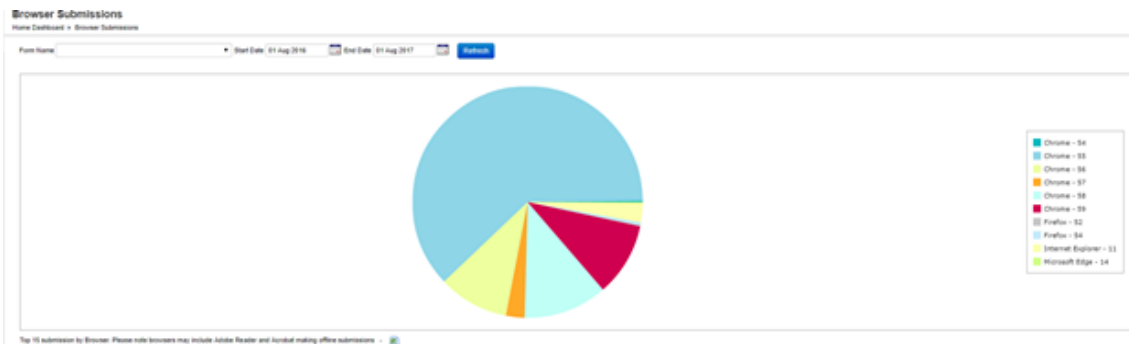
## View Browser Submissions Pie Chart


The *Browser Submissions* pie chart is accessed through the *Analytics* menu of Transact Manager. To view the *Browser Submissions Chart*:

1. Navigate to *Analytics* from the menu bar. Navigating to *Analytics* will display the Analytics menu.
2. Select *Browser Submissions* from the *Analytics* menu.

The screenshot below displays an example of the *Browser Submissions* pie chart.

You can filter the data represented in the pie chart by using the *Form Name* dropdown (to only see browsers used for a specific form), or by changing the date range (initially defaulted to one year up to the current date).



You may also export the browser submissions data (based on your filter selections) to an XLS file by clicking the  icon.

# The Operating System Submissions Pie Chart (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Submissions Pie Chart \(Manager v17.10\)](#)
- [Form Submissions Pie Chart \(Manager v5.1\)](#)
- [Forms Activity Chart \(Manager v17.10\)](#)
- [Forms Activity Chart \(Manager v5.1\)](#)
- [The Browser Submissions Pie Chart \(Manager v17.10\)](#)
- [The Browser Submissions Pie Chart \(Manager v5.1\)](#)
- [The Operating System Submissions Pie Chart \(Manager v17.10\)](#)
- [The Operating System Submissions Pie Chart \(Manager v5.1\)](#)
- [The Referrer Submissions Pie Chart \(Manager v17.10\)](#)
- [The Referrer Submissions Pie Chart \(Manager v5.1\)](#)

## Page Contents:

- [The Operating System Submissions Pie Chart](#)
- [View Operating System Submissions Pie Chart](#)

## The Operating System Submissions Pie Chart

The *Operating System Submission* pie chart identifies the top operating systems used by form users to submit forms.

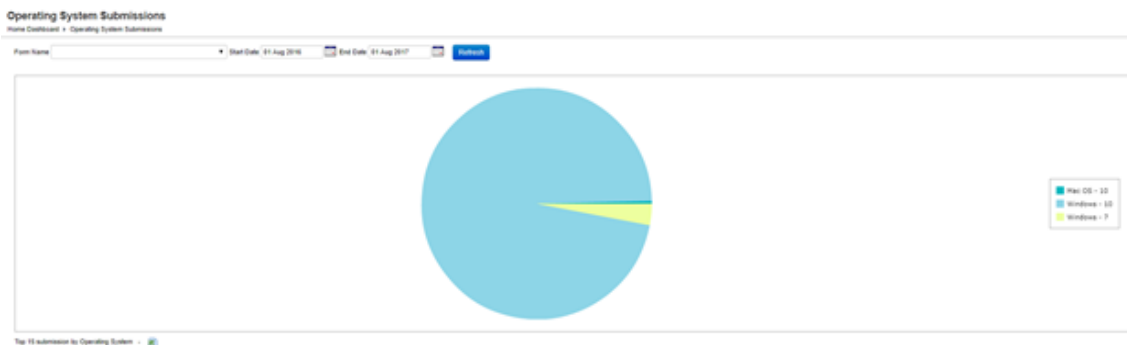
## View Operating System Submissions Pie Chart


The *Operating System Submissions* pie chart is accessed through the *Analytics* menu of Transact Manager. To view the *Operating System Submissions* pie chart:

1. Navigate to *Analytics* from the menu bar. Navigating to *Analytics* will display the *Analytics* menu.
2. Select *Operating System Submissions* from the *Analytics* menu.

The screenshot below displays an example of the *Operating System Submissions* pie chart.

You can filter the data represented on the pie chart by using the *Form Name* dropdown (to only see operating systems used for a specified form), or by changing the date range (initially defaulted to one year up to the current date).



You may also export the operating system submissions data (based on your filter selections) to an XLS file by clicking the  icon.

# Forms Activity Chart (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Submissions Pie Chart \(Manager v17.10\)](#)
- [Form Submissions Pie Chart \(Manager v5.1\)](#)
- [Forms Activity Chart \(Manager v17.10\)](#)
- [Forms Activity Chart \(Manager v5.1\)](#)
- [The Browser Submissions Pie Chart \(Manager v17.10\)](#)
- [The Browser Submissions Pie Chart \(Manager v5.1\)](#)
- [The Operating System Submissions Pie Chart \(Manager v17.10\)](#)
- [The Operating System Submissions Pie Chart \(Manager v5.1\)](#)
- [The Referrer Submissions Pie Chart \(Manager v17.10\)](#)
- [The Referrer Submissions Pie Chart \(Manager v5.1\)](#)

## Page Contents:

- [Forms Activity Chart](#)
- [View Forms Activity Chart](#)

## Forms Activity Chart

The *Forms Activity* chart displays activity of forms opened (a form session) and forms submitted. The chart can either display on a daily interval (showing one month's form activity) or on an hourly interval (showing one day's form activity).

## View Forms Activity Chart

The *Forms Activity* chart is accessed through the *Analytics* menu of Transact Manager. To view the *Forms Activity* chart:

1. Navigate to *Analytics* from the menu bar. Navigating to *Analytics* will display the *Analytics* menu.
2. Select *Forms Activity* from the *Analytics* menu.

The screenshot below displays an example of the *Forms Activity* chart.

You can filter this chart by form, space and/or device type (the device used to open and/or submit the form).



- The red line represents the number of form sessions or forms opened.
- The blue line represents the number of forms submitted.

# Form Submissions Pie Chart (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Submissions Pie Chart \(Manager v17.10\)](#)
- [Form Submissions Pie Chart \(Manager v5.1\)](#)
- [Forms Activity Chart \(Manager v17.10\)](#)
- [Forms Activity Chart \(Manager v5.1\)](#)
- [The Browser Submissions Pie Chart \(Manager v17.10\)](#)
- [The Browser Submissions Pie Chart \(Manager v5.1\)](#)
- [The Operating System Submissions Pie Chart \(Manager v17.10\)](#)
- [The Operating System Submissions Pie Chart \(Manager v5.1\)](#)
- [The Referrer Submissions Pie Chart \(Manager v17.10\)](#)
- [The Referrer Submissions Pie Chart \(Manager v5.1\)](#)

## Page Contents:

- [Form Submissions Pie Chart](#)
- [View Form Submissions Pie Chart](#)

## Form Submissions Pie Chart

The *Form Submissions* pie chart illustrates the most active forms and their percentage in relation to submissions made during the selected date range. For each form, the pie chart displays the total number of submissions made, and the percentage of each in relation to the total number of submissions made during the selected date range.

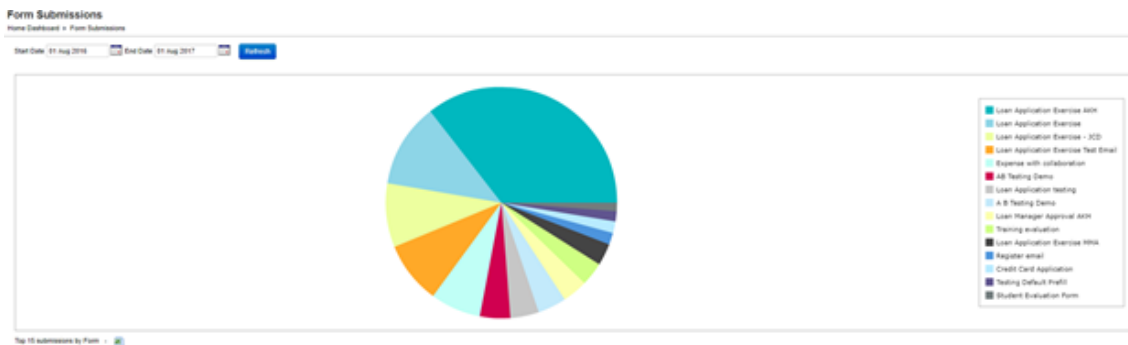
## View Form Submissions Pie Chart


The *Form Submissions* pie chart is accessed through the *Analytics* menu of Transact Manager. To view the *Form Submissions* pie chart:

1. Navigate to *Analytics* from the menu bar. Navigating to *Analytics* will display the *Analytics* menu.
2. Select *Form Submissions* from the *Analytics* menu.


The screenshot below displays an example of the *Form Submissions* pie chart.

You can filter the data represented by changing the date range (initially defaulted to one year up to the current date).



You may also export the form submissions data (based on your filter selections) to an XLS file by clicking the  icon. All forms will be included in the data exported and not just for the most active forms.

# Form A/B Testing (Manager v5.1)

 Unknown macro: 'redirect'

## Related Pages:

- [Analyze the A/B Testing Results \(Manager v17.10\)](#)
- [Analyze the A/B Testing Results \(Manager v5.1\)](#)
- [Configure A/B Testing \(Manager v17.10\)](#)
- [Configure A/B Testing \(Manager v5.1\)](#)
- [Form A/B Testing \(Manager v17.10\)](#)
- [Form A/B Testing \(Manager v5.1\)](#)

## Overview

Improving conversion rates is often imperative to any form modification. To easily measure the effectiveness of any proposed changes made to a form prior to adopting them, the *Form A/B Testing* feature allows for a trial period. After the trial period, it is hoped that a clear winner will be declared and implemented as the newly adopted version of the form.

The *Form A/B Testing* feature in Transact Manager is comparing versions (usually two, the new proposed one versus the current version, but more may be included) of the same form to test the effectiveness of certain modifications. During this trial period, the modified form is tested in the following way:

- At each request for the form, a user is presented with one of a group of predetermined form versions (randomly chosen by the system).
- All user activity is captured (most importantly the submissions by form version).
- Form version statistics can be monitored and analyzed.

After the trial period, the statistics can be viewed and analyzed as a graphical representation to determine the effectiveness of changes to a form.

# Configure A/B Testing (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Analyze the A/B Testing Results \(Manager v17.10\)](#)
- [Analyze the A/B Testing Results \(Manager v5.1\)](#)
- [Configure A/B Testing \(Manager v17.10\)](#)
- [Configure A/B Testing \(Manager v5.1\)](#)
- [Form A/B Testing \(Manager v17.10\)](#)
- [Form A/B Testing \(Manager v5.1\)](#)

## Page Contents

- [Configure A/B Testing](#)
- [End the A/B Testing](#)

## Configure A/B Testing

The example form displayed below has three form versions. As this form has not yet been configured for A/B testing, only the *Current Version* shown here as the ticked *Version 1* of the form is offered to users.

### A B Testing Demo

Home Dashboard > Form

Dashboard | Details | Flow Config | Email Verification | Form Versions | Abandonment | Page Tracking | Spaces | Group Access | Form Promotion | Deployment Schedule

**Form Details**

Form Display Name: A B Testing Demo  
 Form Code: abtestingdemo  
 Organization: mantaki  
 Created: 09 May 2017 - 10:26 by mantaki@avoka.com  
 Last Modified: 30 May 2017 - 11:52 by mantaki@avoka.com

**Form URLs**

Spaces: Web Plug-in, Receipt Test Harness

**Form Versions**

Version	Current Version	Last Modified	Properties	Attachments	Services	Data Config
3	Make Current	30 May 2017				
2	Make Current	09 May 2017				
1	✓	09 May 2017				

New Form Version | Export Current Form Version

**Latest Transactions**

ID	Receipt Number	Time	Transaction Status	Receipt
1474	8NS09Z8	09 May 17 14:40	Delivery Ready	
1470	LZ0V444	09 May 17 14:41	Delivery Ready	
1467	577RJKP	09 May 17 14:41	Delivery Ready	
1463	3M7HDVN	09 May 17 14:40	Delivery Ready	
1462	8PWSYZ3	09 May 17 14:40	Delivery Ready	

[View All Transactions](#)

Close

To configure A/B testing for your form:

1. Select *Forms* from the *Menu* bar and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Details* tab.
4. Select the *A/B Testing Version Selector* service from the *Form Version Selector* dropdown.

### A B Testing Demo

Home Dashboard > Form

Dashboard | Details | Flow Config | Email Verification | Form Versions | Abandonment | Page Tracking | Spaces | Group Access | Form Promotion | Deployment Schedule

Form Display Name: A B Testing Demo  
 Form Code: abtestingdemo  
 Ref Form ID:  
 Form Manager:  
 Transaction Value:  
 Transact Insights:  Active   
 Log Form XML:   
 Test Mode:   
**Form Version Selector: A/B Testing Form Version Selector - v1**  
 Submission Expiry Date:  
 Submission Expiry Days:  
 Tracking Code / Receipt Numbers  
 Tracking & Receipt No. Mode: Use Tracking Code for Receipt No.  
 Tracking Code Service:  
 Delivery Channels  
 Production Delivery:  
 Test Mode Delivery:  
 Abandoned Delivery:  
 Validation Failure Delivery:  
 Transaction Data Retention Policies (max age)  
 Saved Transactions (days): System: 30 days  
 Finished Transaction PII Data (days): System: 7 days  
 Delete Form Data Extracts:   
 Save | Validate Form | Close

5. Click the *Save* button.

Whenever a user selects this form, the *A/B Testing Form Version Selector* is the service that randomly chooses the version of the form to display. This service may be further customized by clicking on the *Edit* link as shown below. For instance, there may be multiple form versions for your form and you may wish to nominate only the relevant form versions to include in the A/B testing. It is advisable that you proceed with caution as explained below in the *Electing Specific Form Versions Recommendations* section.

To nominate specific form versions to be included in the A/B form testing:

1. Click the *Edit* link as shown in the screenshot below.

2. The *Parameters Edit* tab of the *A/B Form Version Selector* service definition will be displayed as shown in screenshot below. Enter the form versions as numbers, without spaces and separated by commas.
3. Click the *Save* button.

By leaving the *Included Form Versions* blank, all form versions of the form are included in the A/B form testing.

## A/B Testing Form Version Selector - v1

Home Dashboard > Form > Service Definition

As soon as the *Form Version Selector* has been set up and configured, the A/B form trial period will commence. From now on until the end of the trial period whenever a user requests this form, any one of the elected versions (or all versions, if *Included Form Versions* is left blank) will be rendered to the user requesting the form.

## Electing Specific Form Versions Recommendations

In most cases A/B testing is for a new version of a form versus the previous version of the form. This means that you would typically be electing the latest two versions of your form to include in the A/B test.

However, by electing specific version numbers to include this will affect any other form(s) in Transact Manager which is also using this same *A/B Form Version Selector* service. In the case where a form is already using the *A/B Form Version Selector* service and specific version numbers are elected for at least one of the forms, then it is recommended to use a copy of the *A/B Form Version Selector* service for this form by doing the following:

1. From the *Services* menu bar, select *All Services* from the dropdown menu.
2. Click on the *Copy* button.
3. Select *Form Version Selector* from the *Service Type* dropdown.
4. Select *A/B Testing Form Version Selector* from the *Existing Service Name* dropdown.
5. Change the name (below added a suffix) for this service in the *New Name* field.

6. Select your organization from the *Organization* dropdown (this dropdown is not visible where you have only been granted access to one organization, instead it will be defaulted to your organization).
7. Click the *Save* button.

## Copy Service Definition

Home Dashboard ▶ All Services ▶ Copy Service Definition

Service Type\*

Existing Service Name\*

New Name\*

Version Number\*

Organization

Now when you assign the *Form Version Selector* to your form (as explained above) you will see the new service that you just copied appear in the dropdown. Follow the steps as explained above in the form and include the specific versions, except select and use this new service instead.

## End the A/B Testing

At end the trial period for form A/B testing you will need to remove the *Form Version Selector* service, as follows:

1. Select *Forms* from the *Menu* bar and select *Forms* from the dropdown menu.
2. Find and select your form.
3. Switch to the *Details* tab.
4. Select blank from the *Form Version Selector* dropdown.
5. Click the *Save* button.

# Analyze the A/B Testing Results (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Analyze the A/B Testing Results \(Manager v17.10\)](#)
- [Analyze the A/B Testing Results \(Manager v5.1\)](#)
- [Configure A/B Testing \(Manager v17.10\)](#)
- [Configure A/B Testing \(Manager v5.1\)](#)
- [Form A/B Testing \(Manager v17.10\)](#)
- [Form A/B Testing \(Manager v5.1\)](#)

## Analyze the A/B Testing Results

Transact Manager provides out of the box analytics for A/B testing. These analytics allow a comparison to be made between any two form versions (at any one time), from the elected group of form versions for the trial.

The A/B form testing can be monitored and analyzed at any time during the trial period by:


1. Select *Analytics* from the menu bar, and select *Form A/B Testing* from the dropdown menu.
2. Specify the following criteria:
  - a. *Form*: Select your form from the dropdown.
  - b. *Space*: Select the relevant form space from the dropdown. If left blank, the statistics will represent tests gathered from all form spaces where this form is hosted.
  - c. *A-Test Version*: Select from the dropdown of eligible form version numbers to represent the A version test results.
  - d. *B-Test Version*: Select from the dropdown of eligible form version numbers to represent the B version test results.
  - e. *Device Type*: Select a device from the dropdown. If left blank, the statistics will represent tests gathered for all devices where the form was accessed.

In accordance with our selection criteria, the results below are statistics for our sample form which show a comparison of form versions 1.0 vs 2.0 on desktop devices. The comparison is further categorized into *Opened*, *User Saved* and *Submitted*.



Further reporting may be available for A/B Testing analytics from [Transact Insights](#).

# System Configuration (Manager v5.1)


 Unknown macro: 'redirect'

The content within this section covers information relating to configuring Transact Manager.

Below you will find a list of topics within this section.

- [Multi-Environment \(Manager v5.1\)](#)
- [Server Nodes \(Manager v5.1\)](#)
- [Outgoing Email \(Manager v5.1\)](#)


# Multi-Environment (Manager v5.1)

 Unknown macro: 'redirect'


The content within this section covers information relating to working with multiple Transact Manager environments for testing purposes.

Below you will find a list of topics within this section.

- [Multi-Environment Support Overview \(Manager v5.1\)](#)
- [Migrate Services \(Manager v5.1\)](#)
- [Migrate Form Space \(Manager v5.1\)](#)
- [Migrate Security Managers \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v5.1\)](#)
- [The Import Log \(Manager v5.1\)](#)
- [Form Test Mode \(Manager v5.1\)](#)

 Unknown macro: 'disable-content-rating-macro'

# Multi-Environment Support Overview (Manager v5.1)

 Unknown macro: 'redirect'

Related Pages:

Page Contents:

- [Overview](#)
- [Migration Order](#)

## Overview

When Transact Manager is configured, several environments will often be set up. These environments can include a development environment, several test servers as well as the final production environment. As forms and configurations mature, they can migrate from one environment to another until finally reaching the production environment where they are presented to end users.

Though Transact Manager can be set up to migrate forms, organizations, etc from one environment to another, TM can also emulate the process of migration by using the *Form Test Mode* feature. This feature is configured at the form level and is used to test the form before preparing it for use by end users.

The initial testing environment is manually configured to include services, spaces, security managers, etc. The objects created in this environment can be migrated using the processes shown in this section. From there, you will need to export and import as you move between the environments.


## Migration Order

When migrating any set of objects (for example an organization and all its associated forms) from one environment to another, there is a specified order in which you need to import the archive objects to Transact Manager.

The list below documents the import order that should be followed when migrating a set of objects from one environment to another. Please note you will need to complete these processes each time you migrate from one environment to the next.

1. [Migrate Services \(Manager v5.1\)](#)
2. [Migrate Form Space \(Manager v5.1\)](#)
3. [Migrate Security Managers \(Manager v5.1\)](#)
4. [Migrate an Organization \(Manager v5.1\)](#)
5. [Migrate a Form \(Manager v5.1\)](#)
6. [Migrate Groups \(Manager v5.1\)](#)
7. [Migrate Roles \(Manager v5.1\)](#)

For example, if you want to migrate a space as well as an organization and its forms, from one environment to another, you need to import the space first, then the Organization and finally the forms associated with that Organization.

 When migrating any object, especially objects such as *Services*, it is important to remember that they may contain server/environment specific information (such as endpoint URLs). For this reason, it is important to review the information contained in each of the objects before running any operations. This is also true for spaces as they need to have their context path adjusted to associate them with the environment that they are being migrated to.

Error rendering macro  
'contentbylabel'

com.atlassian.renderer.

v2.macro.

MacroException: Error  
parsing 'sort' or

'reverse' parameter.

# Migrate Services (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Test Mode \(Manager v17.10\)](#)
- [Form Test Mode \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v17.10\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v17.10\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v17.10\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v17.10\)](#)
- [Migrate Roles \(Manager v5.1\)](#)

## Page Contents:

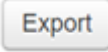
- [Export Services](#)
- [Import Services](#)

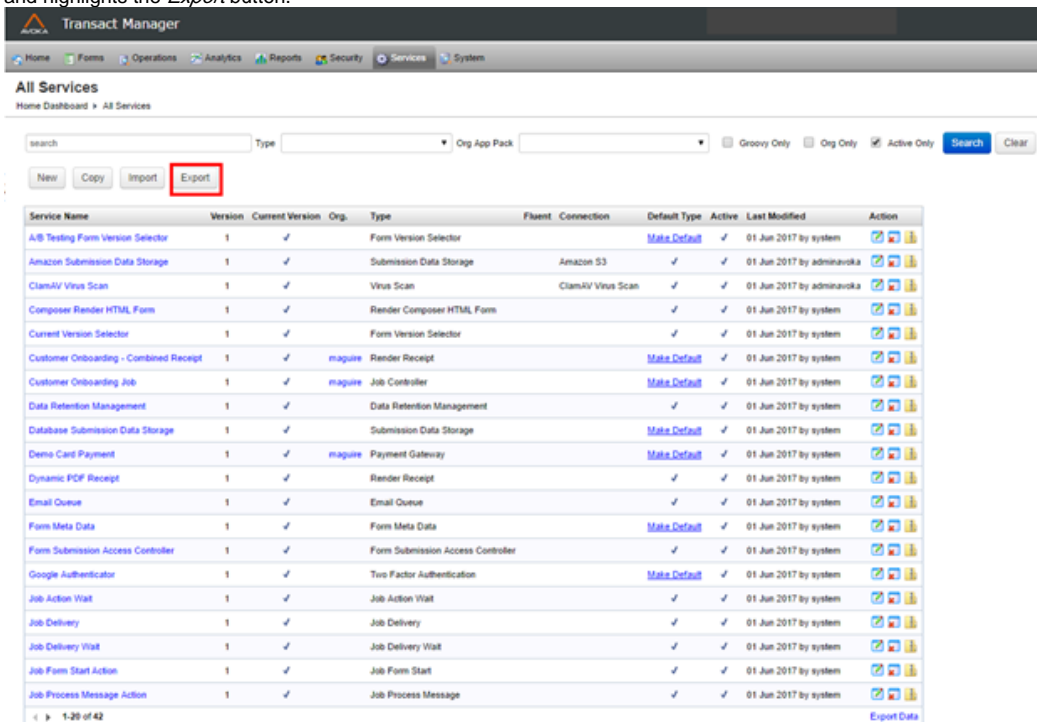
Transact Manager allows you to export the services that are currently configured in one environment and import them into another environment. Exporting a set of services from one environment and importing them to another allows you to configure and test services on different environments before migrating them over to the final production environment to be presented to end users.

## Export Services


The first step when migrating any object from one environment to another is exporting it.

To export a set of Services:

1. Navigate to *Services* from the menu bar.  
Navigating to *Services* will display the *Services Dropdown Menu*.
2. Select *All Services* from the *Services Dropdown Menu*.  
Selecting *All Services* will display the list of services currently configured in the selected TM environment.
3. Click the *Export* button (  ).  
Clicking this button will export all the displayed services and create a *Service Archive Zip File* which will be downloaded to your computer. The screenshot below displays the *All Services* screen and highlights the *Export* button.



Service Name	Version	Current Version	Org	Type	Flaent	Connection	Default Type	Active	Last Modified	Action
A/B Testing Form Version Selector	1	✓		Form Version Selector			Make Default	✓	01 Jun 2017 by system	
Amazon Submission Data Storage	1	✓		Submission Data Storage		Amazon S3	Make Default	✓	01 Jun 2017 by adminavolka	
ClamAV Virus Scan	1	✓		Virus Scan		ClamAV Virus Scan	Make Default	✓	01 Jun 2017 by adminavolka	
Composer Render HTML Form	1	✓		Render Composer HTML Form			Make Default	✓	01 Jun 2017 by system	
Current Version Selector	1	✓		Form Version Selector			Make Default	✓	01 Jun 2017 by system	
Customer Onboarding - Combined Receipt	1	✓	maguire	Render Receipt			Make Default	✓	01 Jun 2017 by system	
Customer Onboarding Job	1	✓	maguire	Job Controller			Make Default	✓	01 Jun 2017 by system	
Data Retention Management	1	✓		Data Retention Management			Make Default	✓	01 Jun 2017 by system	
Database Submission Data Storage	1	✓		Submission Data Storage			Make Default	✓	01 Jun 2017 by system	
Demo Card Payment	1	✓	maguire	Payment Gateway			Make Default	✓	01 Jun 2017 by system	
Dynamic PDF Receipt	1	✓		Render Receipt			Make Default	✓	01 Jun 2017 by system	
Email Queue	1	✓		Email Queue			Make Default	✓	01 Jun 2017 by system	
Form Meta Data	1	✓		Form Meta Data			Make Default	✓	01 Jun 2017 by system	
Form Submission Access Controller	1	✓		Form Submission Access Controller			Make Default	✓	01 Jun 2017 by system	
Google Authenticator	1	✓		Two Factor Authentication			Make Default	✓	01 Jun 2017 by system	
Job Action Wait	1	✓		Job Action Wait			Make Default	✓	01 Jun 2017 by system	
Job Delivery	1	✓		Job Delivery			Make Default	✓	01 Jun 2017 by system	
Job Delivery Wait	1	✓		Job Delivery Wait			Make Default	✓	01 Jun 2017 by system	
Job Form Start Action	1	✓		Job Form Start			Make Default	✓	01 Jun 2017 by system	
Job Process Message Action	1	✓		Job Process Message			Make Default	✓	01 Jun 2017 by system	

You can also export individual Services by clicking the *Export Archive* icon (  ) from the row of the service that you want to export. The screenshot below highlights the *Export Archive* button.

Service Name	Version	Current Version	Org.	Type	Fluent	Connection	Default Type	Active	Last Modified	Action
A/B Testing Form Version Selector	1	✓		Form Version Selector			Make Default	✓	01 Jun 2017 by system	
Amazon Submission Data Storage	1	✓		Submission Data Storage		Amazon S3	✓	✓	01 Jun 2017 by adminavoka	
ClamAV Virus Scan	1	✓		Virus Scan		ClamAV Virus Scan	✓	✓	01 Jun 2017 by adminavoka	
Composer Render HTML Form	1	✓		Render Composer HTML Form			✓	✓	01 Jun 2017 by system	
Current Version Selector	1	✓		Form Version Selector			✓	✓	01 Jun 2017 by system	
Customer Onboarding - Combined Receipt	1	✓	maguire	Render Receipt			Make Default	✓	01 Jun 2017 by system	
Customer Onboarding Job	1	✓	maguire	Job Controller			Make Default	✓	01 Jun 2017 by system	
Data Retention Management	1	✓		Data Retention Management			✓	✓	01 Jun 2017 by system	
Database Submission Data Storage	1	✓		Submission Data Storage			Make Default	✓	01 Jun 2017 by system	
Demo Card Payment	1	✓	maguire	Payment Gateway			Make Default	✓	01 Jun 2017 by system	
Dynamic PDF Receipt	1	✓		Render Receipt			✓	✓	01 Jun 2017 by system	
Email Queue	1	✓		Email Queue			✓	✓	01 Jun 2017 by system	
Form Meta Data	1	✓		Form Meta Data			Make Default	✓	01 Jun 2017 by system	
Form Submission Access Controller	1	✓		Form Submission Access Controller			✓	✓	01 Jun 2017 by system	
Google Authenticator	1	✓		Two Factor Authentication			Make Default	✓	01 Jun 2017 by system	
Job Action Wait	1	✓		Job Action Wait			✓	✓	01 Jun 2017 by system	
Job Delivery	1	✓		Job Delivery			✓	✓	01 Jun 2017 by system	
Job Delivery Wait	1	✓		Job Delivery Wait			✓	✓	01 Jun 2017 by system	
Job Form Start Action	1	✓		Job Form Start			✓	✓	01 Jun 2017 by system	
Job Process Message Action	1	✓		Job Process Message			✓	✓	01 Jun 2017 by system	

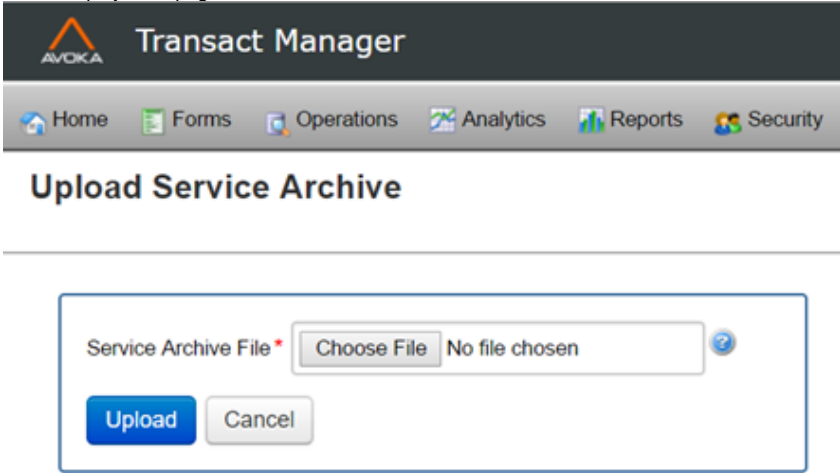
You can also search or filter this list by using the search textbox or the various dropdown menus.

### Import Services

Once you have exported the list of services (or individual service) and downloaded the *Service Archive Zip File*, the next step is importing the *Service Archive Zip File* to another TM environment.

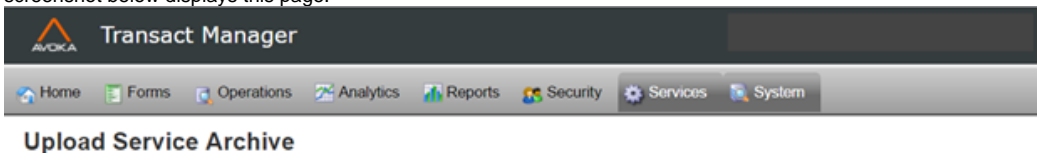
To import a *Service Archive Zip File* to a TM environment:

1. Navigate to *Services* from the menu bar.
2. Select *All Services* from the *Services Dropdown Menu*.
3. Click the *Import* button.  
Clicking the *Import* button will direct you to the *Upload Service Archive* page. The screenshot below displays this page.



4. Click the *Choose File* button and navigate to the folder on your computer where the downloaded *Service Archive* is located and select the *Service Archive Zip File*.
5. Click the *Upload* button.  
Clicking the *Upload* button will direct you to the *Upload Service Archive* page and will ask you to confirm the name of the archive file and decide whether to import the services to a different organization than that configured in the import archive file. By default, Transact Manager will use the organizations configured in the import archive file but you can alternatively use the dropdown


menu to select one of the already configured organizations on the TM environment. The screenshot below displays this page.

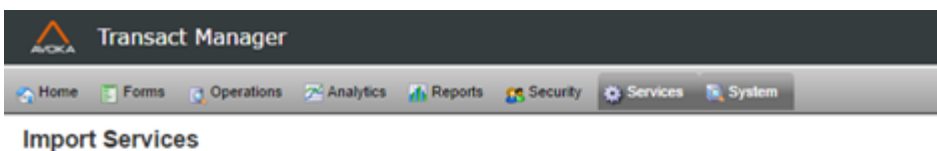


Archive Name

Add to Organization

6. Select the organization that you want to add the services to or use the organization/s already configured in the import archive file.
7. Click the *Proceed To Import* button. Clicking the *Proceed To Import* button will direct you to the *Import Services* page. The screenshot below displays this page.

 Check the *Import Action* field for any indication of import conflicts that may need to be resolved.



**Import Information**

Import Action

Effective Client Code

Export Environment


Export Date


TM Version


Database Version

Organization

**Options**

Preserve Existing Services  

Preserve Existing Service Connections  

Preserve Service Type Defaults  

8. Select the appropriate options from the *Options* section of the *Import Services* page.
  - a. Preserve Existing services – If selected, any services that already exist in the environment that you are importing the services to will not be modified in any way. Only new services (new to the environment that you are importing to) will be imported.
  - b. Preserve Existing Service Connections - If selected, any services that already exist in the environment that you are importing the services to will not be modified in any way. Only new service connections (new to the environment that you are importing to) will still be created.
  - c. Preserve Service Type Defaults – if selected, none of the imported services will be promoted to be the default for their service types, regardless of their default status on the environment that they are being exported from. If unchecked, the service type default flag will be imported, and existing services may be denoted if needed.

9. Click the *Import* button.  
Clicking the *Import* button will import the service archive file to the new environment and direct you to the *Import Action* page. The screenshot below displays this page.

Transact Manager


Home Forms Operations Analytics Reports Security Services System

### Import Action

Service Archive imported successfully. Please review the list of detail messages.

Import Action Detail Messages

ID	Detail Message	
1	Preserving existing services. Skipping import of existing service: Job Receipt Wait	
2	Service named 'Welcome Greeting' could not be created because the organization 'tschiller' could not be found. Skipping import of this service.	
3	Preserving existing services. Skipping import of existing service: Dynamic PDF Receipt	
4	Preserving existing services. Skipping import of existing service: Job Delivery	
5	Service named 'TrainingBankAddressGlobal' could not be created because the organization 'cthomas' could not be found. Skipping import of this service.	
6	Service named 'Job Controller - 1 Step Approve' could not be created because the organization 'Training' could not be found. Skipping import of this service.	
7	Preserving existing services. Skipping import of existing service: Submission Receipt Render	
8	Service named 'Credit Card Exchange Rate' could not be created because the organization 'cc' could not be found. Skipping import of this service.	
9	Preserving existing services. Skipping import of existing service: Customer Onboarding Job	
10	Service named 'Google Places API - Address Search' could not be created because the organization 'cc' could not be found. Skipping import of this service.	
11	Service named 'Job Controller - 2 Step Gp Form AKH' could not be created because the organization 'alhepburn' could not be found. Skipping import of this service.	
12	Service named 'Credit Card Country List' could not be created because the organization 'creditcardorg' could not be found. Skipping import of this service.	
13	Service named 'Job Controller - 2 Step Review copy' could not be created because the organization 'Collaboration' could not be found. Skipping import of this service.	

Clicking the  icon displays the details of each import action.

# Migrate Form Space (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Test Mode \(Manager v17.10\)](#)
- [Form Test Mode \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v17.10\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v17.10\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v17.10\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v17.10\)](#)
- [Migrate Roles \(Manager v5.1\)](#)

## Page Contents:

- [Export Form Spaces](#)
- [Import Form Spaces](#)

Transact Manager allows you to migrate form spaces from one environment to another. Migrating a form space will not migrate the forms associated with the form spaces but it will migrate the following:

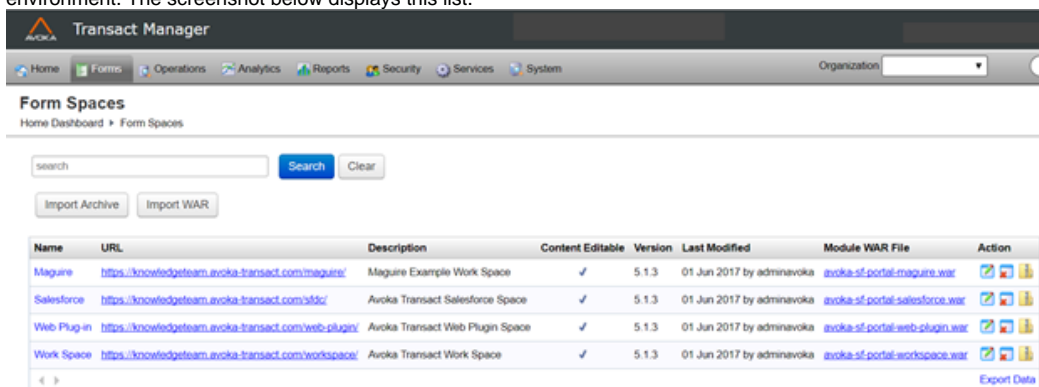
- Pages associated with the form space.
- Resources associated with the form space.
- Properties associated with the form space.













## Export Form Spaces


The first step in migrating a form space is creating a form space archive zip file and exporting it.

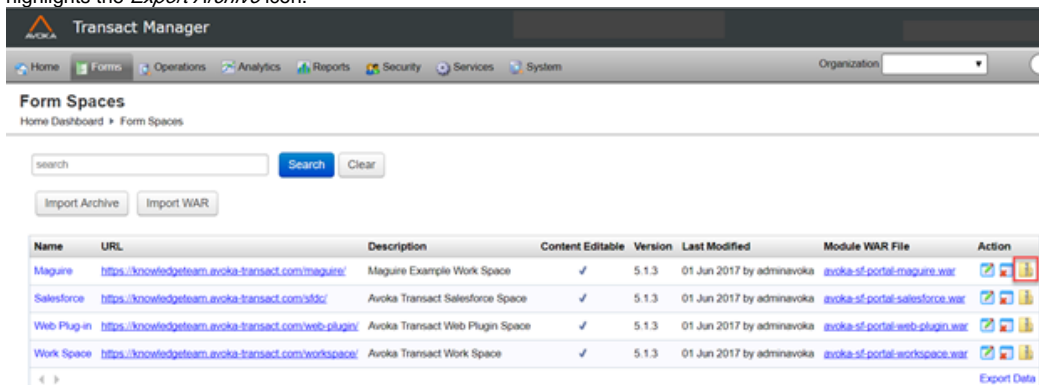
To export a form space:













1. Navigate to *Forms* from the menu bar. Navigating to *Forms* will display the *Forms Menu*.
2. Select *Form Spaces* from the *Forms Menu*. Selecting *Form Spaces* will display the list of form spaces currently configured in the selected TM environment. The screenshot below displays this list.



Name	URL	Description	Content Editable	Version	Last Modified	Module WAR File	Action
Maguire	<a href="https://knowledgegeteam.avoka-transact.com/maguire/">https://knowledgegeteam.avoka-transact.com/maguire/</a>	Maguire Example Work Space	✓	5.1.3	01 Jun 2017 by adminavoka	<a href="#">avoka-sf-portal-maguire.war</a>	  
Salesforce	<a href="https://knowledgegeteam.avoka-transact.com/sfsc/">https://knowledgegeteam.avoka-transact.com/sfsc/</a>	Avoka Transact Salesforce Space	✓	5.1.3	01 Jun 2017 by adminavoka	<a href="#">avoka-sf-portal-salesforce.war</a>	  
Web Plug-in	<a href="https://knowledgegeteam.avoka-transact.com/web-plugin/">https://knowledgegeteam.avoka-transact.com/web-plugin/</a>	Avoka Transact Web Plugin Space	✓	5.1.3	01 Jun 2017 by adminavoka	<a href="#">avoka-sf-portal-web-plugin.war</a>	  
Work Space	<a href="https://knowledgegeteam.avoka-transact.com/workspace/">https://knowledgegeteam.avoka-transact.com/workspace/</a>	Avoka Transact Work Space	✓	5.1.3	01 Jun 2017 by adminavoka	<a href="#">avoka-sf-portal-workspace.war</a>	  

3. Select the form space that you want to export and click the *Export Archive* () icon. Clicking this icon will download the archive of the selected form space. The screenshot below highlights the *Export Archive* icon.



Name	URL	Description	Content Editable	Version	Last Modified	Module WAR File	Action
Maguire	<a href="https://knowledgegeteam.avoka-transact.com/maguire/">https://knowledgegeteam.avoka-transact.com/maguire/</a>	Maguire Example Work Space	✓	5.1.3	01 Jun 2017 by adminavoka	<a href="#">avoka-sf-portal-maguire.war</a>	  
Salesforce	<a href="https://knowledgegeteam.avoka-transact.com/sfsc/">https://knowledgegeteam.avoka-transact.com/sfsc/</a>	Avoka Transact Salesforce Space	✓	5.1.3	01 Jun 2017 by adminavoka	<a href="#">avoka-sf-portal-salesforce.war</a>	  
Web Plug-in	<a href="https://knowledgegeteam.avoka-transact.com/web-plugin/">https://knowledgegeteam.avoka-transact.com/web-plugin/</a>	Avoka Transact Web Plugin Space	✓	5.1.3	01 Jun 2017 by adminavoka	<a href="#">avoka-sf-portal-web-plugin.war</a>	  
Work Space	<a href="https://knowledgegeteam.avoka-transact.com/workspace/">https://knowledgegeteam.avoka-transact.com/workspace/</a>	Avoka Transact Work Space	✓	5.1.3	01 Jun 2017 by adminavoka	<a href="#">avoka-sf-portal-workspace.war</a>	  

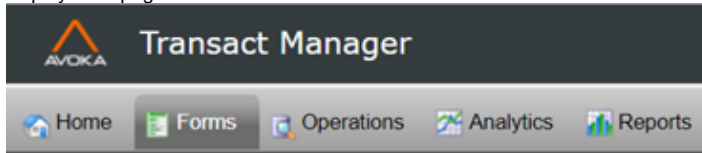
## Import Form Spaces

Once you have exported the form space and created and downloaded the *Form Space Archive Zip File*, the next step in migrating a form space is importing the *Form Space Archive Zip File* to the new environment.

To import a form space:

1. Navigate to *Forms > Form Spaces*
2. Click the *Import Archive* button. Clicking this button will direct you to the *Upload Form Space Archive* page. The screenshot below

displays this page.



## Upload Form Space Archive

3. Click the *Choose File* button and select the *Form Space Archive Zip File* on your computer.
4. Click the *Proceed To Import* button. Clicking this button will direct you to the *Import Portal* page. The screenshot below displays this page.

5. Select the options that you want to include in the import of the form space.
  - a. Select *Import Portal Pages* to import any pages that have been configured to be associated with the form space that you are importing.
  - b. Select *Import Portal Resources* to import any resources that have been configured to be associated with the form space that you are importing.
  - c. Select *Import Portal Properties* to import any properties that have been configured to be associated with the form space that you are importing.
  - d. Select *Import Offline Submission Form* to import any offline submission forms that have been configured to be associated with the form space that you are importing.
6. Click the *Import* button. Clicking the *Import* button will import the *Form Space Archive* into the TM environment and direct you to the *Form Space Import Action* page. The screenshot below displays this page. This screen provides an overview of what has been imported into the TM environment. If any issues are encountered, they will be displayed in the *Import Message* text field.

## Import Action

**i** Portal Archive imported successfully.

Import Action	Detail Messages
ID	36
Client	
Import Type	Portal
Status	Completed
Creation Time	04 Jul 2017 18:14:51
Import Time	04 Jul 2017 18:30:08
Import User	swilliams
Import Options	Portal Definition, Pages, Properties, Resources, Offline Submission Form
Import Message	Portal 'TM Fundamentals' was imported successfully.

**Close**

- Click the *Close button*.  
Clicking the *Close* button will direct you back to the list of form spaces currently configured in the TM environment.

# Migrate Security Managers (Manager v5.1)

## Page Contents:

- [Export Security Managers](#)
- [Import Security Managers](#)

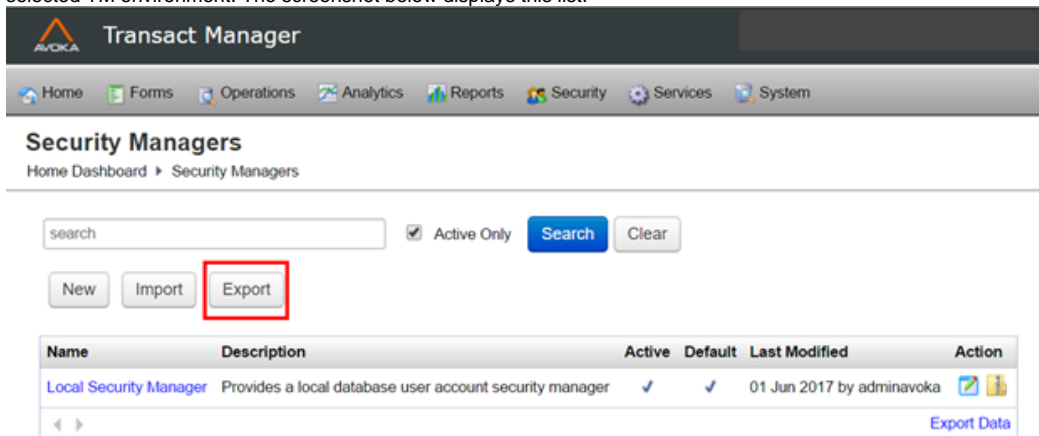
Transact Manager allows you to export a set of security managers (or a single security manager) and import them to a different Transact Manager environment. Migrating security manager configurations can save you time and ensure that security manager settings are configured in the same way on multiple environments.

## Export Security Managers

The first step when migrating security managers from one TM environment to another is to export them from one Transact Manager environment.

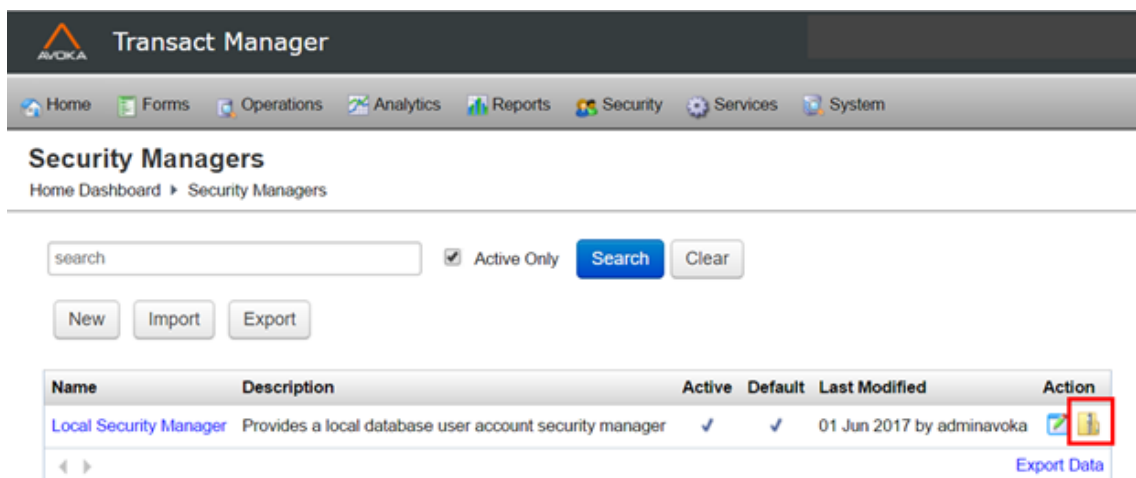
To export a full set of security managers:

1. Navigate to Security from the menu bar.  
Navigating to *Security* will display the *Security Menu*.
2. Select *Security Managers* from the *Security Menu*.  
Selecting *Security Managers* will display the list of security managers currently configured in the selected TM environment. The screenshot below displays this list.



3. Click the *Export* button.  
Clicking the *Export* button will create a zip file containing the configuration data that will be downloaded to your computer. The above screenshot highlights the *Export* button.

To export a single security manager, click the *Export Archive* icon (📁) next to the security manager that you want to export. The screenshot below highlights this icon.



## Import Security Managers

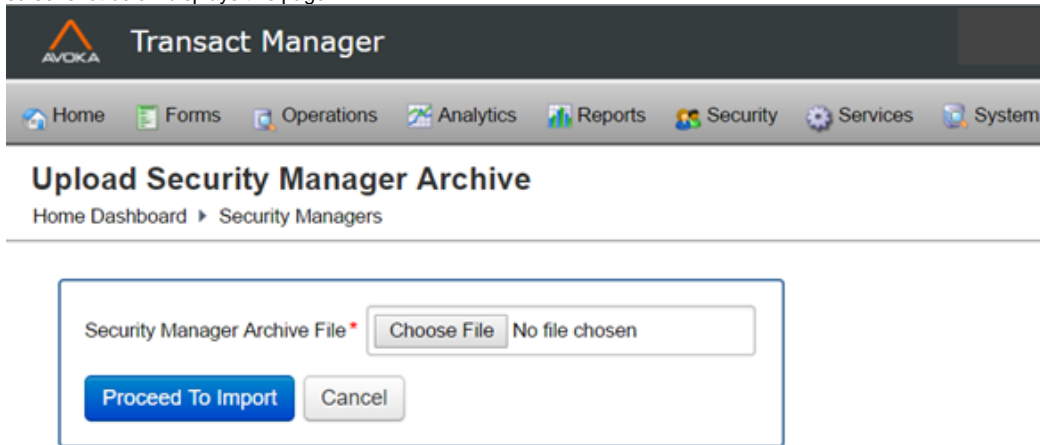
The next step in migrating a set of security managers from one environment to another is importing the downloaded *Security Manager Export Archive Zip File* to the destination TM environment.

To import a security manager archive zip file to a TM environment:

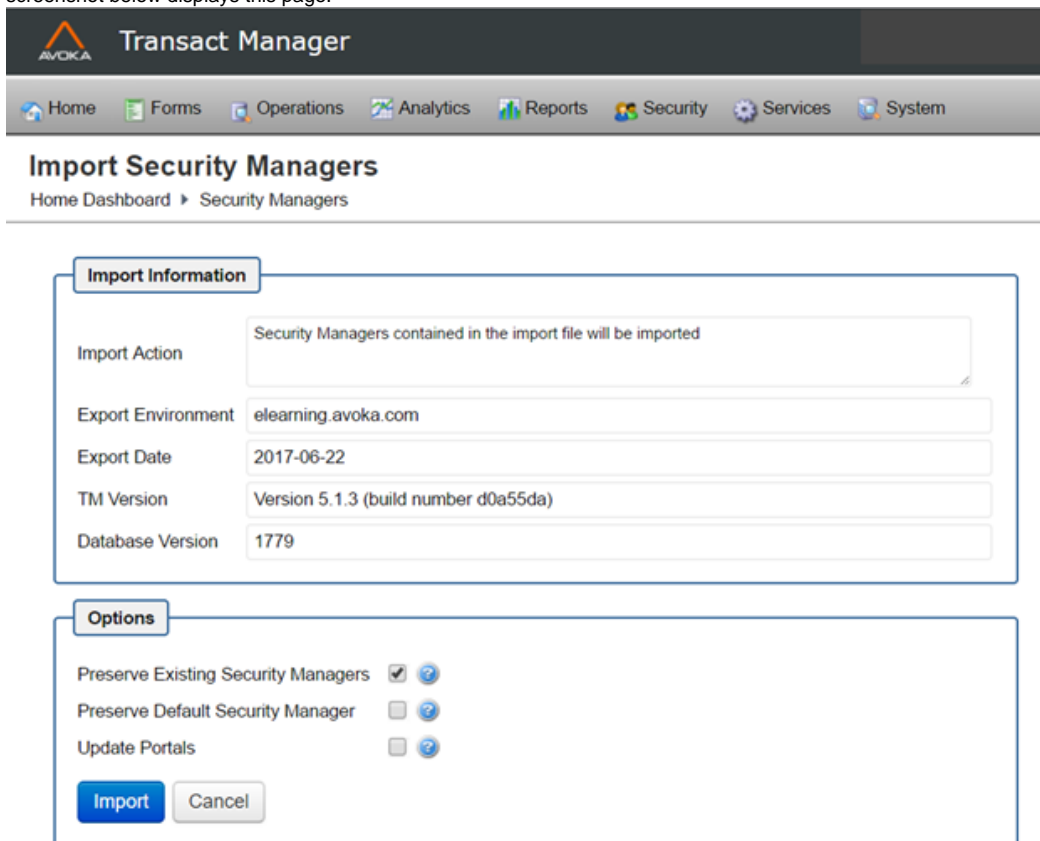
## Related Pages:

- [Form Test Mode \(Manager v17.10\)](#)
- [Form Test Mode \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v17.10\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v17.10\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v17.10\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v17.10\)](#)
- [Migrate Roles \(Manager v5.1\)](#)

1. Navigate to *Security > Security Managers*
2. Click the *Import* button  
Clicking the *Import* button will direct you to the *Upload Security Manager Archive* page. The screenshot below displays this page.



3. Click the *Choose File* button and navigate to the folder on your Computer where the downloaded *Security Manager Archive Zip File* is located and select the zip file.
4. Click the *Proceed To Import* button.  
Clicking the *Proceed To Import* button will direct you to the *Import Security Managers* page. The screenshot below displays this page.



The *Import Security Managers* page displays information about the environment that the security managers are coming from and presents the options available to configure the import.

5. Select the appropriate options from the *Options* section of the *Import Security Managers* screen.
  - Preserve Existing Security Managers – if selected, any security managers that already exist on the destination environment will not be modified in any way. Only new security managers will be imported to the new TM environment.
  - Preserve Default Security Managers – if selected, none of the imported security managers will be promoted to be the default security manager of the environment, regardless of the default flags configured on the environment that they are coming from. If unselected, the default flag will be imported, and the default security manager may change.
  - Update Portals – if selected, spaces will be associated with the new security managers according to the settings exported from the environment that the archive file is coming from.
6. Click the *Import* button  
Clicking the *Import* button will direct you to the *Import Action* page. The screenshot below displays this page.

## Import Action

**i** Security Manager Archive imported successfully.

Import Action	Detail Messages
ID	16
Client	
Import Type	Security Manager
Status	Completed
Creation Time	21 Jun 2017 18:10:24
Import Time	21 Jun 2017 19:17:56
Import User	swilliams
Import Options	Preserve Existing Security Managers
Import Message	Imported all services successfully.

**Close**

The *Import Action* page will identify the *Import Options* that you selected, and will display a message if the import was successful.

- Click the *Close* button.  
Clicking the *Close* button will direct you back to the list of security managers. If the import was successful, this list should include the security managers that you imported to the new TM environment.

# Migrate an Organization (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Test Mode \(Manager v17.10\)](#)
- [Form Test Mode \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v17.10\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v17.10\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v17.10\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v17.10\)](#)
- [Migrate Roles \(Manager v5.1\)](#)

## Page Contents:

- [Export an Organization](#)
- [Import an Organization](#)

If needed, Transact Manager allows you to migrate an entire organization from one environment to another. When migrating an organization, all its associated configurations are also migrated. Once the organization has been migrated to the new environment, it will be set up as it was in the original environment (though the entry IDs may change).


Not all entities are included when migrating from one another environment to another; for example, for security reasons, organization administrators are not migrated along with the organization. In addition, forms and their associated data are not included when an organization is migrated to a new environment.

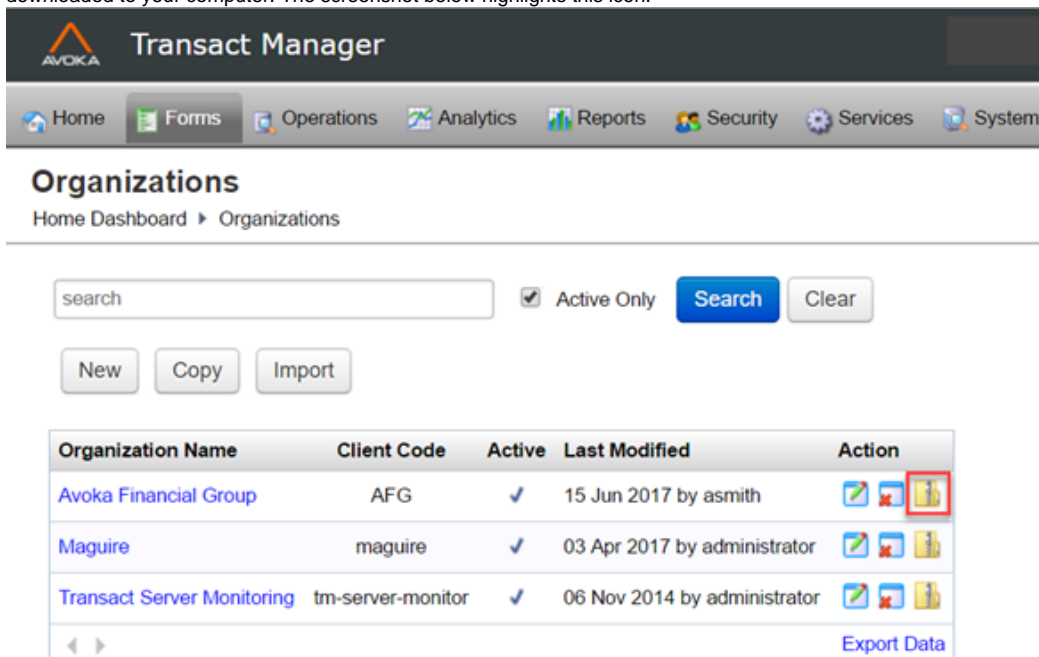
Migrating an organization is a great way to back up organization data without introducing complicated database dependencies.




## Export an Organization

The first step in migrating an organization from one environment to another is exporting it.

To export an organization:

1. Navigate to *Forms* from the menu bar. Navigating to *Forms* will display the *Forms Menu*.
2. Select *Organizations* from the *Forms Menu*. Selecting *Organizations* will display the list of Organizations currently configured in the selected TM environment.
3. Select the Organization that you want to export and click the *Export Archive* icon (  ). Clicking the *Export Archive* icon will create a zip file of the exported organization that will be downloaded to your computer. The screenshot below highlights this icon.



Organization Name	Client Code	Active	Last Modified	Action
Avoka Financial Group	AFG	✓	15 Jun 2017 by asmith	
Maguire	maguire	✓	03 Apr 2017 by administrator	
Transact Server Monitoring	tm-server-monitor	✓	06 Nov 2014 by administrator	

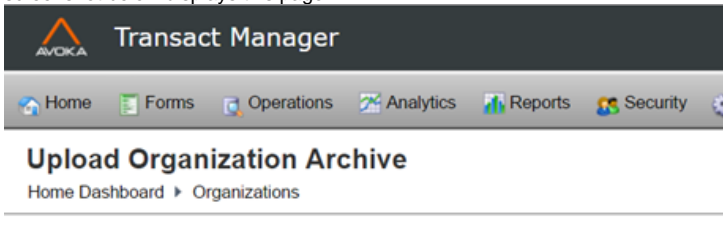
## Import an Organization

Once you have exported the organization and created the zip file, the next step in migrating an organization from one environment to another is importing the created zip file to the new environment.

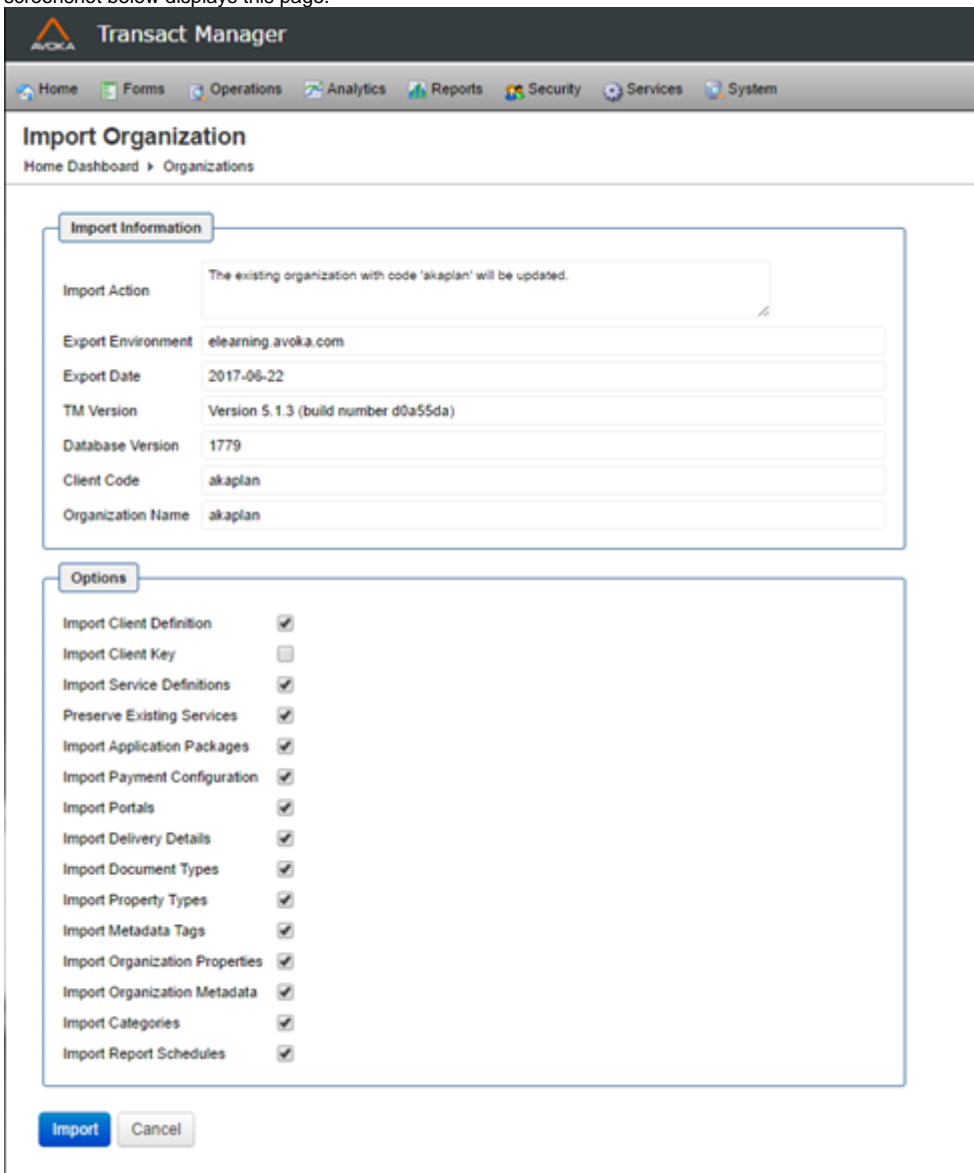
To import an organization to a new environment:

1. Navigate to *Forms* from the menu bar. Navigating to *Forms* will display the *Forms Menu*.
2. Select *Organizations* from the *Forms Menu*. Selecting *Organizations* will display the list of Organizations configured in the selected TM environment.

- Click the *Import* button.  
Clicking the *Import* button will direct you to the *Upload Organization Archive* page. The screenshot below displays this page.



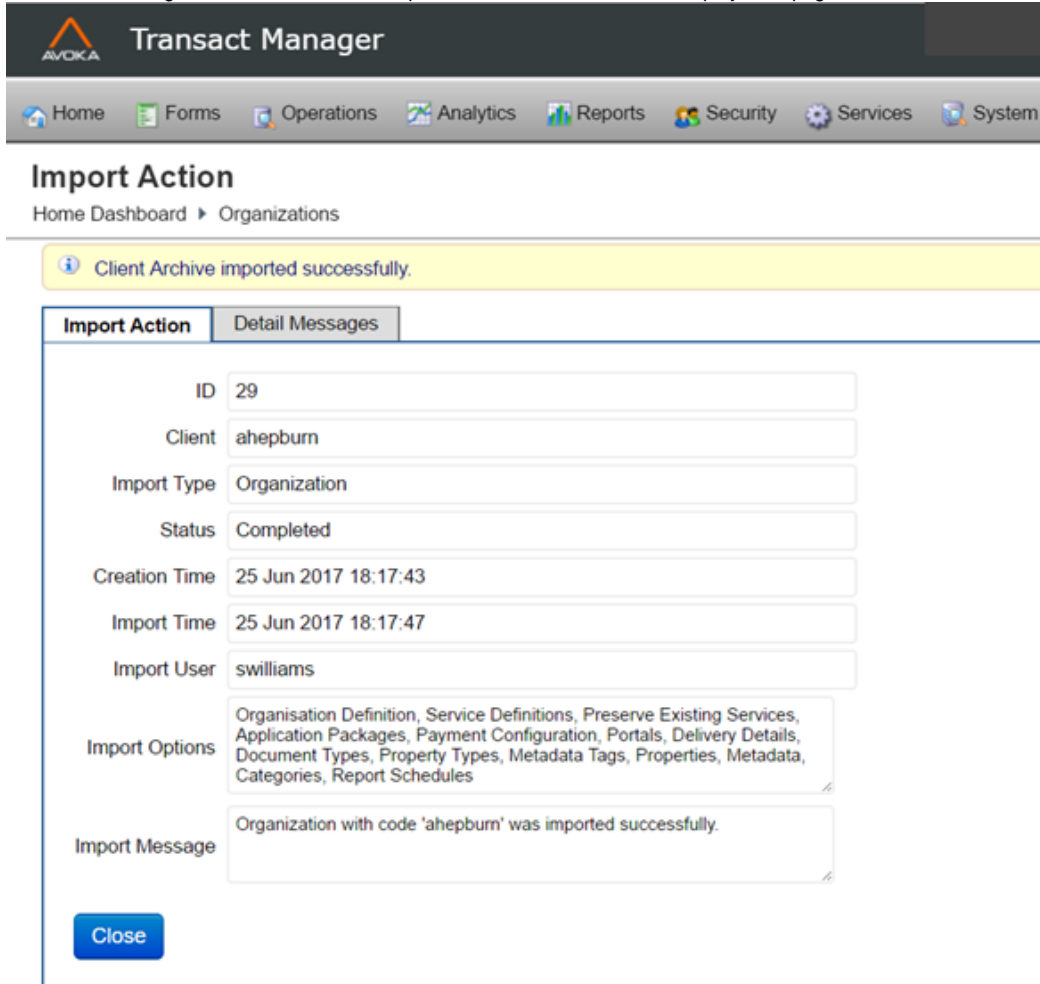
- Click the *Choose File* button and navigate to the *Organization Archive Zip File* that was created when you exported the Organization.  
If you want to import the organization to a different organization (ie an organization that is already configured in the environment), enter the organization's name and client code into the provided textboxes. If you would like to import the organization as a new organization in the new TM environment, leave these fields blank. Leaving these fields blank will import the organization as a new organization in the TM environment.
- Click the *Proceed To Import* button.  
Clicking the *Proceed To Import* button will direct you to the *Import Organization* page. The screenshot below displays this page.



The *Import Information* section of this page identifies the environment that the organization is being migrated from, the export date and the client code and the organization name of the organization being imported.

The *Options* section of this page identifies each of the configuration options that are available to be imported along with the organization. Select the checkboxes of the configuration options that you want to import along with the organization.

6. Select the configuration options that you want to import along with the organization
7. Click the *Import* button.  
Clicking the *Import* button will direct you to the *Import Action* page. This page provides an overview of the organization that has been imported. The screenshot below displays this page.



8. Click the *Close* button.  
Clicking the *Close* button will redirect you to the list of organizations currently configured in the selected TM environment.

# Migrate a Form (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

### Page Contents:


- [Export a Form and All Versions](#)
- [Export a Single Form Version](#)
- [Import a Form \(One or Multiple Versions\)](#)

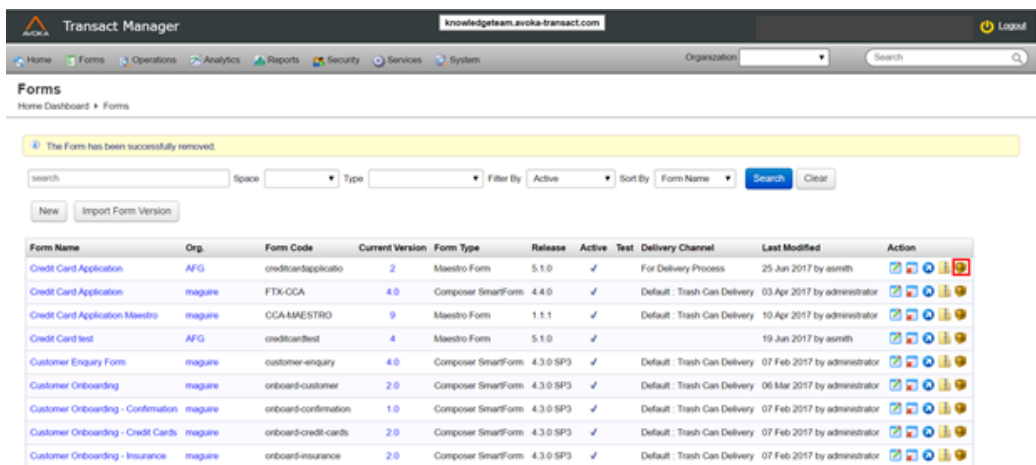
Transact Manager allows you to migrate the current version of the form, or all versions of a form from one TM environment to another.

## Export a Form and All Versions










The first step in migrating a form is exporting it. Transact Manager allows you to export a form and all its associated versions.

To export a form and all its versions:

1. Navigate to *Forms* from the menu bar. Navigating to *Forms* will display the *Forms Menu*.
2. Select *Forms* from the *Forms Menu*. Selecting *Forms* from the *Forms Menu* will display the list of forms currently configured in the selected TM environment.
3. Select the form that you want to export and click the *Export All Form Versions* icon (  ). Clicking this icon will download a zip file to your computer. This zip file contains the form and all its versions and configurations. The screenshot below highlights the *Export All Form Versions* icon.



The screenshot shows the Transact Manager interface with the 'Forms' menu selected. A table lists various forms with columns for Form Name, Org, Form Code, Current Version, Form Type, Release, Active, Test, Delivery Channel, Last Modified, and Action. The 'Action' column contains icons for editing, deleting, and exporting. The 'Export All Form Versions' icon (a red square with a white document and arrows) is highlighted in the first row of the table.

Form Name	Org	Form Code	Current Version	Form Type	Release	Active	Test	Delivery Channel	Last Modified	Action
Credit Card Application	AFG	creditcardapplicatio	2	Maestro Form	5.1.0	✓		For Delivery Process	25 Jun 2017 by asmith	
Credit Card Application	magare	FTX-CCA	4.0	Composer SmartForm	4.4.0	✓		Default - Trash Can Delivery	03 Apr 2017 by administrator	
Credit Card Application Maestro	magare	CCA-MAESTRO	9	Maestro Form	1.1.1	✓		Default - Trash Can Delivery	10 Apr 2017 by administrator	
Credit Card test	AFG	creditcardtest	4	Maestro Form	5.1.0	✓			19 Jun 2017 by asmith	
Customer Enquiry Form	magare	customer-enquiry	4.0	Composer SmartForm	4.3.0 SP3	✓		Default - Trash Can Delivery	07 Feb 2017 by administrator	
Customer Onboarding	magare	onboard-customer	2.0	Composer SmartForm	4.3.0 SP3	✓		Default - Trash Can Delivery	06 Mar 2017 by administrator	
Customer Onboarding - Confirmation	magare	onboard-confirmation	1.0	Composer SmartForm	4.3.0 SP3	✓		Default - Trash Can Delivery	07 Feb 2017 by administrator	
Customer Onboarding - Credit Cards	magare	onboard-credit-cards	2.0	Composer SmartForm	4.3.0 SP3	✓		Default - Trash Can Delivery	07 Feb 2017 by administrator	
Customer Onboarding - Insurance	magare	onboard-insurance	2.0	Composer SmartForm	4.3.0 SP3	✓		Default - Trash Can Delivery	07 Feb 2017 by administrator	

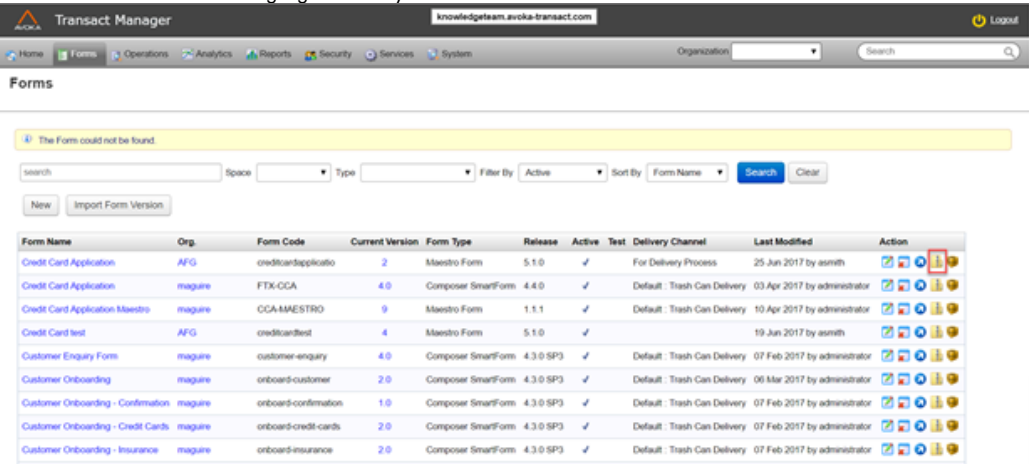
## Export a Single Form Version

Transact Manager allows you to export the *Current Form Version* of a selected form. Exporting a single version of a form to migrate it to a production environment can be useful when only wanting to host the current version of a form on a production environment.

To export the *Current Form Version* of a form:

1. Navigate to *Forms > Forms* from the menu bar

- Select the form that you want to export and click the *Export Current Form Version* icon (📄). Clicking this icon will download a zip file containing the *Current Form Version* of the selected form. The screenshot below highlights the *Export Current Form Version* icon.

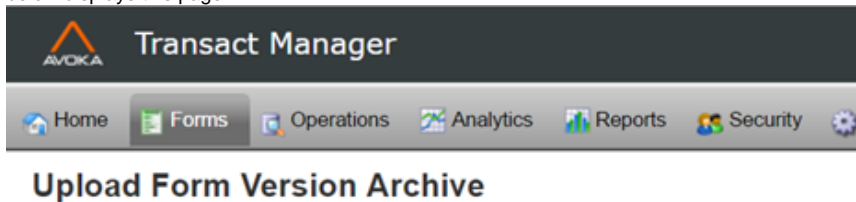


## Import a Form (One or Multiple Versions)

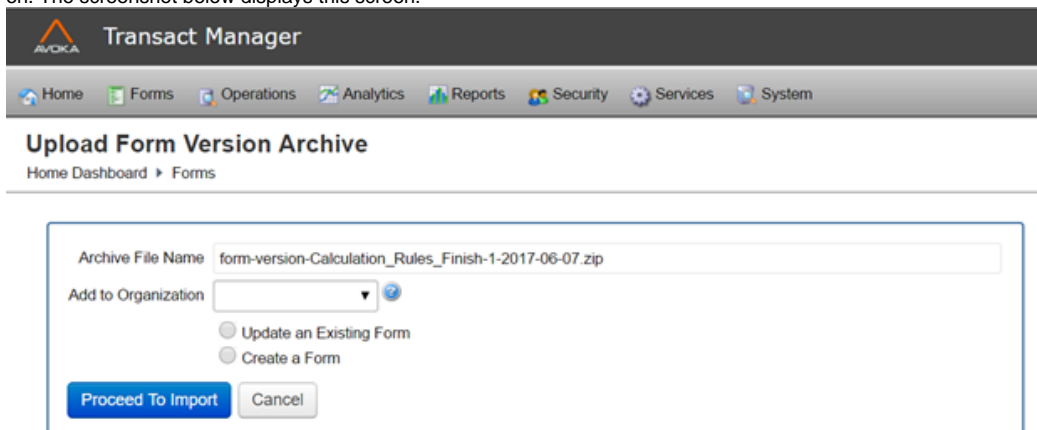
Once you have created the zip file (whether the single form version or all versions of the form), the next step in migrating a form from one environment to another is importing it to the new environment.

To import a form to a TM environment:

- Navigate to *Forms > Forms* from the menu bar
- Click the *Import Form Version* button. Clicking this button will redirect you to the *Upload Form Version Archive* screen. The screenshot below displays this page.



- Click the *Choose File* button and select the exported zip file on your computer.
- Click the *Upload* button. Clicking the *Upload* button will redirect you to the *Upload Form Version Archive Confirmation* screen. The screenshot below displays this screen.



- Select the organization that you would like to add the form to by using the dropdown menu.
- Select *Update an Existing Form* if the form you are uploading is already on the TM environment and you want to update it with the new version (the version you are uploading) OR select *Create*

a *Form* if the form you are uploading is not currently configured on the TM environment that you are uploading it to. Selecting *Create a Form* will populate the *New Form Code* textbox with a form code for the new form. If you would like, you can edit this code using the textbox.

7. Click the *Proceed To Import* button.

Clicking this button will direct you to the *Form Version Import* page. The screenshot below displays this page.

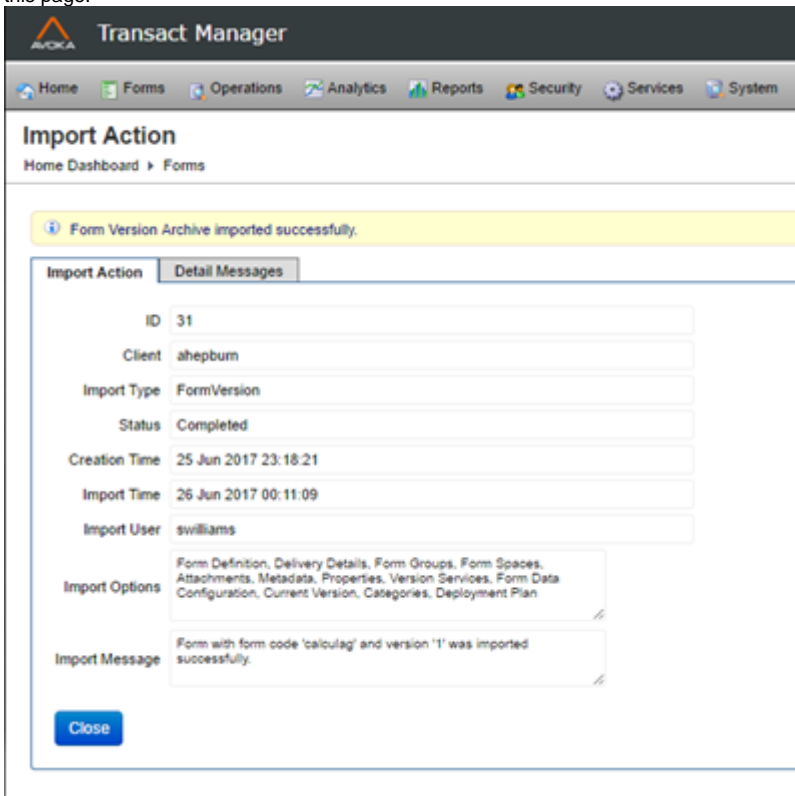
The screenshot shows the 'Form Version Import' page in the Transact Manager application. The page is divided into several sections:

- Form Version Archive:** Fields for 'Export Form Name' (Calculation Rules Finish), 'Export Date' (2017-06-07), 'Export TM Server' (Test50 Environment), 'Export TM Version' (Version 5.0.7 (build number da62d78)), and 'Export from Maestro' (true).
- Import Action:** Fields for 'Import Action' (A new form will be created.), 'Import Form Code' (calculag), and 'Import Client Code' (ahepburn).
- Form - Import Options:** A list of checkboxes for 'Form Details', 'Delivery Channels', 'Groups', 'Spaces', and 'Deployment Schedule', all of which are checked.
- Form Version - Import Options:** A list of checkboxes for 'Make Current Version', 'Form Data Config', 'Properties', 'Attachments', 'Services', 'Tags', and 'Categories', all of which are checked.

At the bottom of the form, there are two buttons: 'Import' and 'Cancel'.

8. Select the appropriate *Form – Import Options*. These are the options that are associated with all versions of the form. By default, all of these options are selected.
9. Select the appropriate *Form Version – Import Options*. These are the options that are applied to a selected version of the form (normally the current version of the form).

- Click the *Import* button.  
Clicking the *Import* button will direct you to the *import Action* page. The screenshot below displays this page.



- Click the *Close* button to return to the list of forms configured on the selected TM environment.

# Migrate Groups (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Test Mode \(Manager v17.10\)](#)
- [Form Test Mode \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v17.10\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v17.10\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v17.10\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v17.10\)](#)
- [Migrate Roles \(Manager v5.1\)](#)

## Page Contents:

- [Export Groups](#)
- [Import Groups](#)

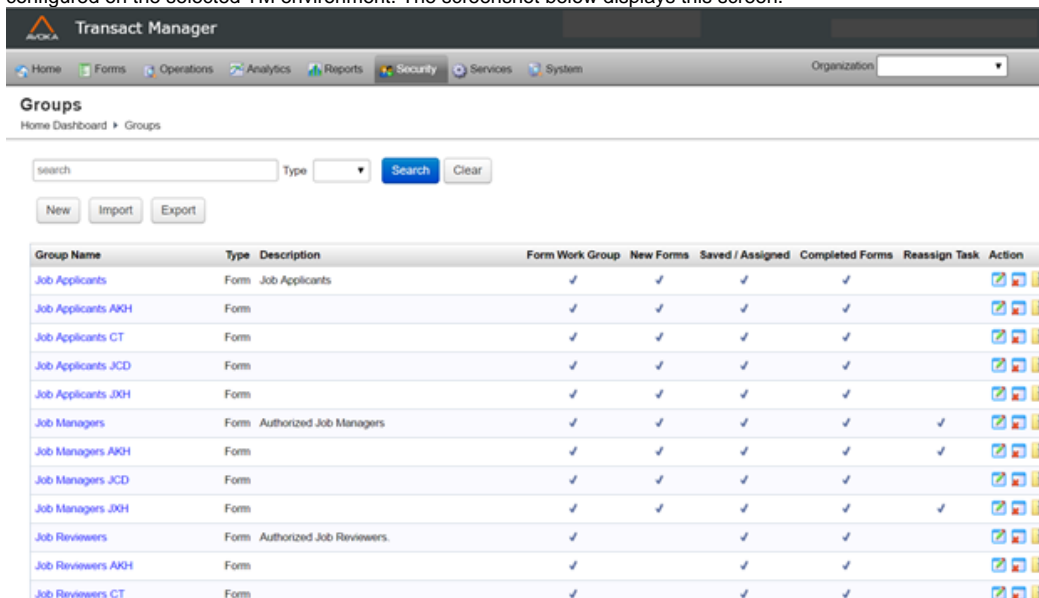
Groups in Transact Manager are used to define a set of users with the same privileges. To save time and resources, Transact Manager allows you to migrate a full set of groups or a single group from one environment to another. It is important to remember that migrating a group does not mean migrating the users associated with the group or the set of forms associated with the group, it simply means migrating the basic group settings (group name, group description) and the group's user control settings.





































## Export Groups

The first step in migrating a group from one environment to another is exporting the group.



To export the full set of groups from an environment:

1. Navigate to *Security* from the menu bar. Navigating to *Security* will display the *Security Menu*.
2. Select *Groups* from the *Security* menu. Selecting *Groups* will direct you to the *Groups* page and display the list of groups currently configured on the selected TM environment. The screenshot below displays this screen.



Group Name	Type	Description	Form Work Group	New Forms	Saved / Assigned	Completed Forms	Reassign Task	Action
Job Applicants	Form	Job Applicants	✓	✓	✓	✓		  
Job Applicants AKH	Form		✓	✓	✓	✓		  
Job Applicants CT	Form		✓	✓	✓	✓		  
Job Applicants JCD	Form		✓	✓	✓	✓		  
Job Applicants JOH	Form		✓	✓	✓	✓		  
Job Managers	Form	Authorized Job Managers	✓	✓	✓	✓	✓	  
Job Managers AKH	Form		✓	✓	✓	✓	✓	  
Job Managers JCD	Form		✓	✓	✓	✓		  
Job Managers JOH	Form		✓	✓	✓	✓	✓	  
Job Reviewers	Form	Authorized Job Reviewers	✓		✓	✓		  
Job Reviewers AKH	Form		✓		✓	✓		  
Job Reviewers CT	Form		✓		✓	✓		  

3. Click the *Export* button. Clicking the *Export* button will export the complete set of groups configured in the selected TM environment and create a *Group Archive Zip File* of these groups that will be downloaded to your computer.

 To export a single group, at step 3 select the group that you want to export and click the *Export Archive* icon (  ).

## Import Groups

The next step in migrating a group or set of groups is importing the *Group Archive Zip File* that was exported to the new environment.

To import a full set of groups or a single group to a new environment:

1. Navigate to *Security > Groups* from the menu bar.
2. Click the *Import* button. Clicking the *Import* button will direct you to the *Upload Group Archive* screen. The screenshot below displays this screen.

## Upload Group Archive

Home Dashboard > Groups

Group Archive File \*  No file chosen

3. Click the *Choose File* button and select the zip file of the exported group/s from your computer.
4. Click the *Proceed To Import* button.  
Clicking the *Proceed To Import* button will direct you to the *Import Group* page. The screenshot below displays this page.

## Import Group

Import Action

Export Environment

Export Date

TM Version

Database Version

Group

5. Click *Import*.  
Clicking the *Import* button will import the group archive to the selected environment and redirect

you to the *Import Action* page. The screenshot below displays this page. If an issue or conflict has occurred, a message will be displayed in the *Import Message* textbox.

**Transact Manager**

Home Forms Operations Analytics Reports Security Services System

## Import Action

Group Archive imported successfully.

**Import Action** Detail Messages

ID 32

Client

Import Type Groups

Status Completed

Creation Time 26 Jun 2017 19:31:02

Import Time 26 Jun 2017 19:48:33

Import User swilliams

Import Options

Import Message Imported all groups successfully.

Close

6. Click the *Close* button.  
Clicking the *Close* button will direct you to the list of groups configured on the selected TM environment.

# Migrate Roles (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Test Mode \(Manager v17.10\)](#)
- [Form Test Mode \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v17.10\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v17.10\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v17.10\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v17.10\)](#)
- [Migrate Roles \(Manager v5.1\)](#)

## Page Contents:

- [Export Roles](#)
- [Import Roles](#)

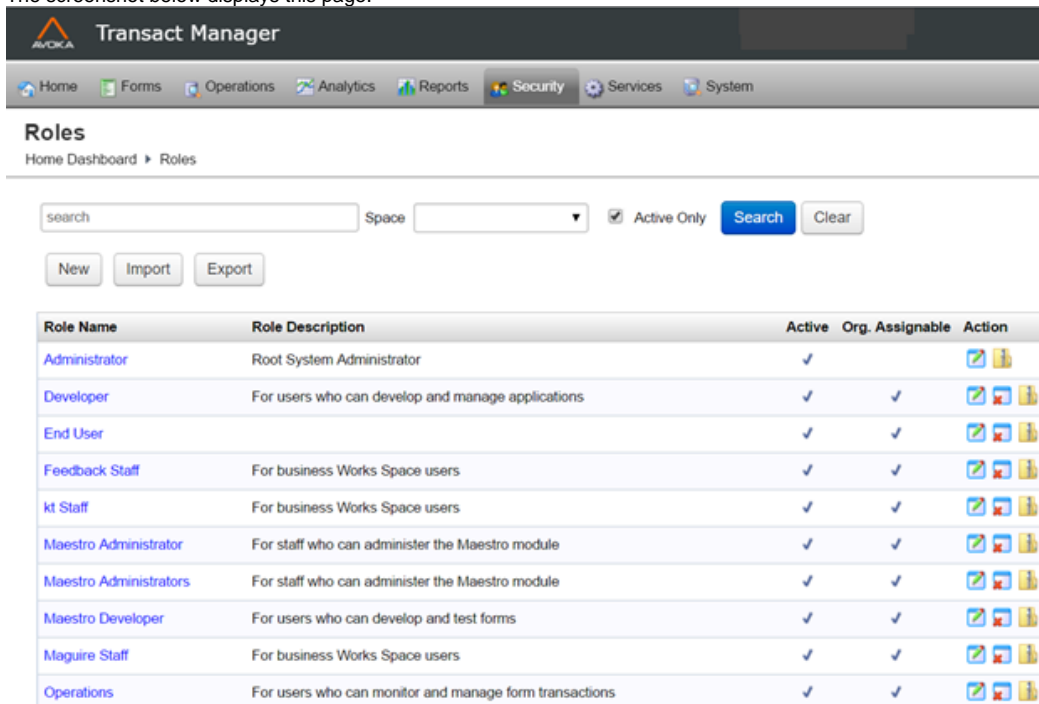
To save yourself the work of setting up the same set of roles on several servers, Transact Manager allows you to migrate a set of roles or individual roles from one TM environment to another. Please note that while the set of permissions is included in the exported zip file, the users associated with the role and other user-related data is not.

## Export Roles

The first step in migrating a role from one environment to another is exporting it.

To export a full set of roles:

1. Navigate to *Security* from the menu bar.  
Navigating to this option will display the *Security Menu*.
2. Select *Roles* from the *Security Menu*.  
Selecting *Roles* will display the list of roles currently configured in the selected TM environment. The screenshot below displays this page.



3. Click the *Export* button.  
Clicking the *Export* button will export the roles and create a zip file that will be downloaded to your computer.

To export a single role, at Step 3, select the role that you want to export and click the *Export Archive* icon ().

To avoid any lockout issues, the *Administrator* role is not included when exporting the full set of roles.

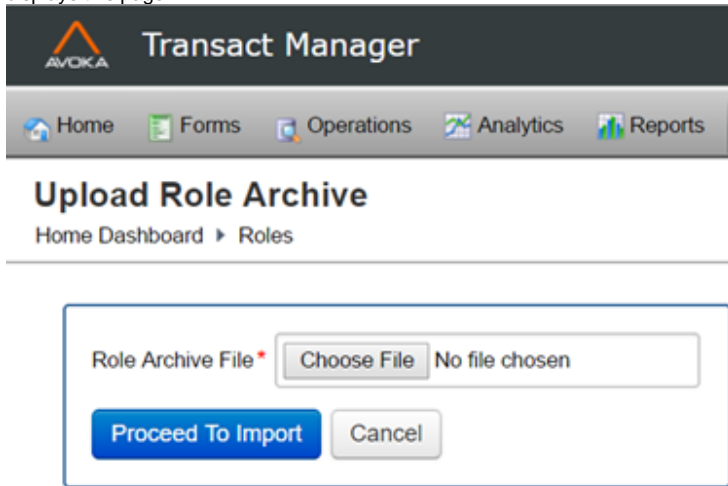
## Import Roles

Once the roles (or single role) have been exported, the next step in migrating a role from one environment to another is importing it to the new environment.

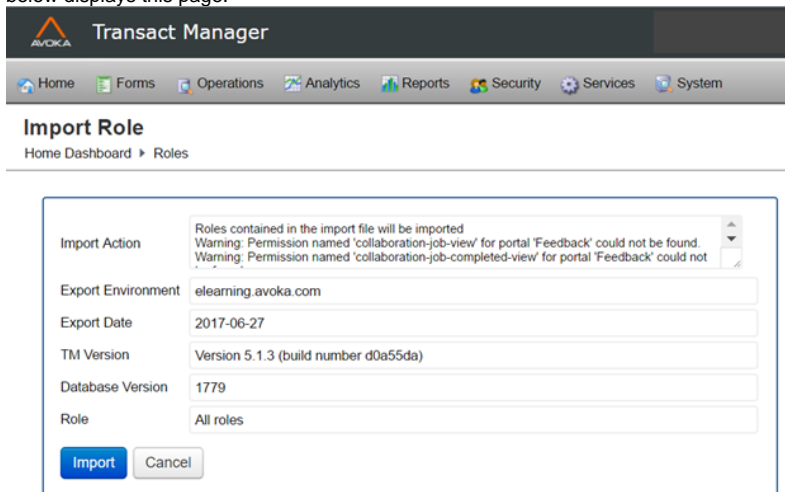
To import a full set of roles or a single role to a TM environment:

1. Navigate to *Security > Roles* from the menu bar.

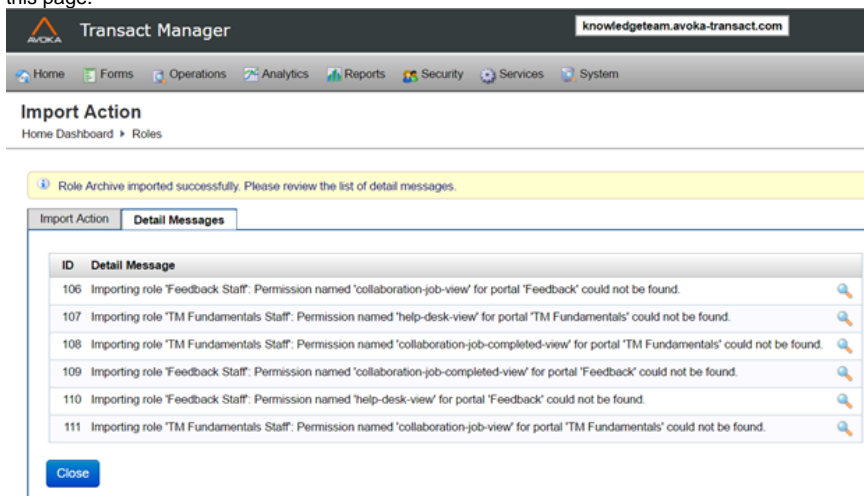
- Click the *Import* button.  
Clicking the *Import* button will direct you to the *Upload Role Archive* page. The screenshot below displays this page.



- Click the *Choose File* button and select the exported role archive zip file
- Click the *Proceed To import* button.  
Clicking *Proceed To import* will direct you to the *Import Role Confirmation* page. Check the Import Action field for any indication of import conflicts that may need to be resolved. The screenshot below displays this page.



- Click the *Import* button.  
Clicking the *Import* button will direct you to the *Role Import Action* page. This page details each of the roles that have just been imported into the TM environment. The screenshot below displays this page.



- Click the *Close* button.  
Clicking *Close* will direct you back to the list of roles configured in the selected TM environment.

# The Import Log (Manager v5.1)

Unknown macro: 'redirect'

To facilitate tracking and auditing, Transact Manager keeps a log of all import operations that have been performed. This log keeps a record of the outcome of each import as well as any warning messages or issues that were encountered during the importing process.

## View the Import Log

To view the import log:

1. Navigate to *System* from the menu bar.  
Navigating to this option will display the *System Menu*.
2. Select *Import Log* from the *System Menu*.  
Selecting *Import Log* will display the list of import operations for the selected TM environment.  
The screenshot below displays the Import Log.

ID	Org.	Type	Archive Name	Status	Import Time	Import User	Action
33		Roles	roles-archive-all-2017-06-27.zip	Completed	26 Jun 2017 22:34:36	swilliams	<a href="#">Export Data</a>
32		Groups	groups-archive-all-2017-06-27.zip	Completed	26 Jun 2017 19:48:33	swilliams	<a href="#">Export Data</a>
31	ahepburn	FormVersion	form-version-Calculation_Rules_Finish-1-2017-06-07.zip	Completed	26 Jun 2017 00:11:09	swilliams	<a href="#">Export Data</a>
29	ahepburn	Organization	client-archive-ahepburn-2017-06-26.zip	Completed	25 Jun 2017 18:17:47	swilliams	<a href="#">Export Data</a>
26		Service	service-archive-CT_Groovy_Form_Prefill-v1-ct-2017-06-23.zip	Completed	22 Jun 2017 18:18:24	asmith	<a href="#">Export Data</a>
25		Service	service-archive-Fluent_Form_Prefill-v1-bfrost-2017-06-22.zip	Completed	21 Jun 2017 23:36:06	asmith	<a href="#">Export Data</a>
24		Roles	roles-archive-Super_Role-2017-06-22.zip	Completed	21 Jun 2017 20:14:12	swilliams	<a href="#">Export Data</a>
23		Groups	groups-archive-all-2017-06-22.zip	Completed	21 Jun 2017 20:11:09	swilliams	<a href="#">Export Data</a>
22	akaplan	FormVersion	form-version-A_B_Testing_Demo-3-2017-06-22.zip	Completed	21 Jun 2017 20:08:40	swilliams	<a href="#">Export Data</a>
21	akaplan	Organization	client-archive-akaplan-2017-06-22.zip	Completed	21 Jun 2017 19:53:30	swilliams	<a href="#">Export Data</a>
20		MetadataTags	metadata-tag-archive-global-2017-04-20.zip	Completed	21 Jun 2017 19:50:57	swilliams	<a href="#">Export Data</a>
19		MetadataTags	metadata-tag-archive-global-2017-06-22 (1).zip	Completed	21 Jun 2017 19:50:30	swilliams	<a href="#">Export Data</a>
18		MetadataTags	metadata-tag-archive-global-2017-06-22.zip	Completed	21 Jun 2017 19:49:06	swilliams	<a href="#">Export Data</a>

You can filter the list by import type (eg *Organization*), import status and the import start/end dates, and export the search results to Excel by clicking the *Export Data* link below the table.

### Related Pages:

- [Form Test Mode \(Manager v17.10\)](#)
- [Form Test Mode \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v17.10\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v17.10\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v17.10\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v17.10\)](#)
- [Migrate Roles \(Manager v5.1\)](#)

# Form Test Mode (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Form Test Mode \(Manager v17.10\)](#)
- [Form Test Mode \(Manager v5.1\)](#)
- [Migrate a Form \(Manager v17.10\)](#)
- [Migrate a Form \(Manager v5.1\)](#)
- [Migrate an Organization \(Manager v17.10\)](#)
- [Migrate an Organization \(Manager v5.1\)](#)
- [Migrate Groups \(Manager v17.10\)](#)
- [Migrate Groups \(Manager v5.1\)](#)
- [Migrate Roles \(Manager v17.10\)](#)
- [Migrate Roles \(Manager v5.1\)](#)

## Page Contents:

- [Apply Test Mode to a Form](#)
- [Identify a Test Mode Enabled Form](#)


If you do not have multiple TM environments configured, you can emulate the migration process for forms by using the *Form Test Mode* feature of Transact Manager. The *Form Test Mode* is a configuration used to test a form before it is deemed ready for use by end-users.

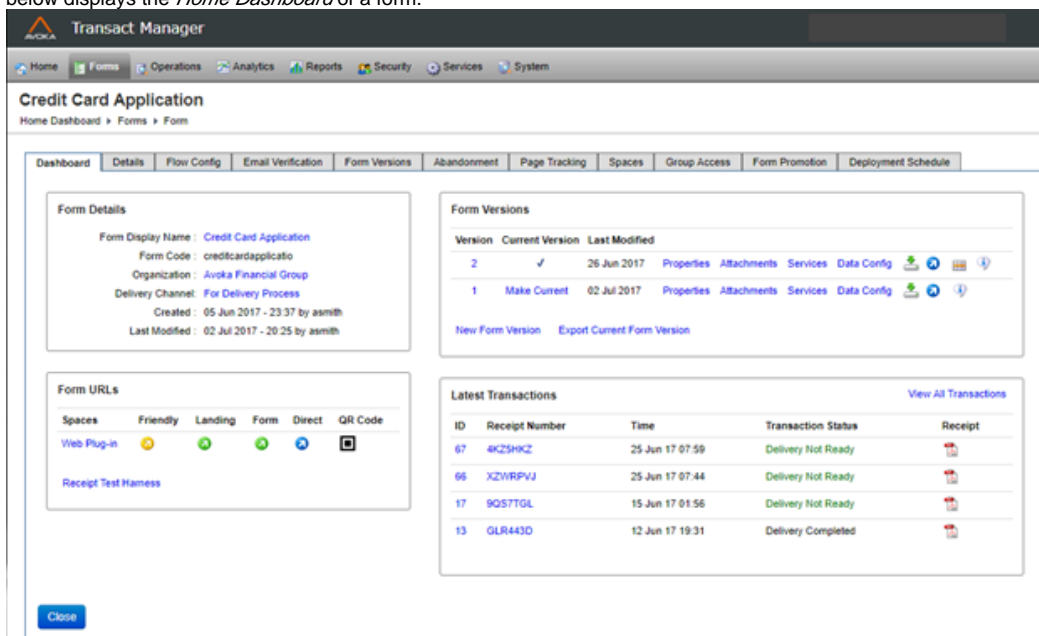
Test Mode allows a form's functionality to be tested whilst controlling how the form can and can't affect the selected TM environment. Transact Manager achieves this test mode feature by using a separate set of delivery channels.

While a form is in test mode, any submissions made will not count towards an Organization's transaction count.

## Apply Test Mode to a Form

To apply the test mode feature to a form:

1. Navigate to *Forms* from the menu bar. Navigating to *Forms* will display the *Forms* menu.
2. Select *Forms* from the *Forms* menu. Selecting *Forms* will display the list of all forms currently configured in the TM environment.
3. Navigate to the form that you want to apply the *Test Mode* to click the edit icon (  ). Clicking the *Edit* icon will direct you to the *Home Dashboard* of the selected form. The screenshot below displays the *Home Dashboard* of a form.



The screenshot shows the Transact Manager interface for a form named 'Credit Card Application'. The dashboard includes several sections:

- Form Details:** Form Display Name: Credit Card Application, Form Code: creditcardapplicatio, Organization: Avoka Financial Group, Delivery Channel: For Delivery Process, Created: 05 Jun 2017 - 23:37 by asmith, Last Modified: 02 Jul 2017 - 20:25 by asmith.
- Form Versions:** A table showing two versions. Version 2 is the current version, last modified on 26 Jun 2017. Version 1 was last modified on 02 Jul 2017.
- Form URLs:** A section with tabs for Spaces, Friendly, Landing, Form, Direct, and QR Code. The 'Form' tab is selected, showing a 'Web Plug-in' and a 'Receipt Test Harness'.
- Latest Transactions:** A table with columns for ID, Receipt Number, Time, Transaction Status, and Receipt. It lists four transactions, with the first three having a status of 'Delivery Not Ready' and the last one 'Delivery Completed'.

4. Switch to the *Details* tab. Switching to the *Details* tab will display select details about the form. The screenshot below displays what you will see when switching to the *Details* tab.

The screenshot shows the 'Credit Card Application' configuration page in the Transact Manager. The 'Test Mode' checkbox is highlighted in red. The page includes sections for form details, tracking codes, delivery channels, and retention policies.

- Select the *Test Mode* checkbox. Selecting this checkbox will activate *Test Mode* for the selected form. The screenshot below highlights the *Test Mode* checkbox.

This screenshot is identical to the one above, but with a red box highlighting the 'Test Mode' checkbox.

- Click the *Save* button. Clicking the *Save* button will apply the *Test Mode* functionality to the selected form.

**DO NOT** leave the page after clicking the *Save* button as there are still steps to complete.

- Navigate to the *Delivery Channels* section of the page and select the appropriate *Delivery Channel* using the *Test Mode Delivery* dropdown menu.

The screenshot below highlights the *Test Mode Delivery* dropdown.

The screenshot shows the 'Credit Card Application' configuration page in the Transact Manager. The page has a navigation bar with 'Home', 'Forms', 'Operations', 'Analytics', 'Reports', 'Security', and 'Services'. Below the navigation bar, there are tabs for 'Dashboard', 'Details', 'Flow Config', 'Email Verification', 'Form Versions', and 'Abandonment'. The 'Details' tab is selected. The form configuration includes fields for 'Form Display Name' (Credit Card Application), 'Form Code' (creditcardapplicatio), 'Ref Form ID', 'Form Manager', 'Transaction Value', 'Transact Insights' (Active checkbox checked), 'Log Form XML', 'Test Mode' (checkbox checked), 'Form Version Selector', 'Submission Expiry Date', and 'Submission Expiry Days'. There is also a section for 'Tracking Code / Receipt Numbers' with 'Tracking & Receipt No. Mode' set to 'Use Tracking Code for Receipt No.' and 'Tracking Code Service'. The 'Delivery Channels' section includes 'Production Delivery', 'Test Mode Delivery' (highlighted with a red box), 'Abandoned Delivery', and 'Validation Failure Delivery'. At the bottom, there are 'Transaction Data Retention Policies' for 'Saved Transactions (days)' (System: 30 days) and 'Finished Transaction PII Data (days)' (System: 7 days). Buttons for 'Save', 'Validate Form', and 'Close' are at the bottom.

8. Click the *Save* button.  
Clicking the *Save* button will save the *Delivery Channel* associated with the *Test Mode*.

## Identify a Test Mode Enabled Form

A form in *Test Mode* is clearly identifiable from the *Form Dashboard* by a red YES in the *Form Details* pane. The screenshot below displays the *Form Details* pane and highlights the red YES that identifies that a form is in *Test Mode*.

**Transact Manager**

Home Forms Operations Analytics Reports Security Services System Organization Search

### Calculation Rules Finish

Home Dashboard Forms Form

Dashboard Details Flow Config Email Verification Form Versions Abandonment Page Tracking Spaces Group Access Form Promotion Deployment Schedule

**Form Details**

Form Display Name: Calculation Rules Finish  
 Form Code: calculag  
 Organization: ahepburn  
**Test Mode: Yes**  
 Delivery Channel: Trash Can Delivery Process AKH  
 Created: 26 Mar 2017 - 23:02 by cabdulrah@evoka.com  
 Last Modified: 03 Jul 2017 - 17:02 by swilliams

**Form URLs**

Spaces	Friendly	Landing	Form	Direct	QR Code
Magure	🟡	🟢	🟢	🔵	📄

Receipt Test Harness

**Form Versions**

Version	Current Version	Last Modified	
1	✓	06 Jun 2017	Properties Attachments Services Data Config

New Form Version Export Current Form Version

**Latest Transactions** [View All Transactions](#)

ID	Receipt Number	Time	Transaction Status	Receipt

Forms are also identified as being in *Test Mode* by a red dot that appears in the *Test* column of the table listing all the forms currently configured in the current TM environment. The screenshot below highlights the red dot that identifies that a form is in *Test Mode*.

**Transact Manager**

Home Forms Operations Analytics Reports Security Services System Organization Search Logout

### Forms

Home Dashboard Forms

search Space Type Filter By Active Sort By Form Name Search Clear

New Import Form Version

Form Name	Org.	Form Code	Current Version	Form Type	Release	Active	Test	Delivery Channel	Last Modified	Action
Calculation Rules Finish	ahepburn	calculag	1	Maestro Form	1.0.22	✓	●	Trash Can Delivery Process AKH	03 Jul 2017 by swilliams	🔗 📄 📄 📄
Credit Card Application	AFG	creditcardapplicatio	2	Maestro Form	5.1.0	✓	●	For Delivery Process	02 Jul 2017 by swilliams	🔗 📄 📄 📄

# Server Nodes (Manager v5.1)

 Unknown macro: 'redirect'

The content within this section covers information relating to server nodes in Transact Manager.

Below you will find a list of topics within this section.

- [Introduction to Server Nodes \(Manager v5.1\)](#)
- [Update a Server Node \(Manager v5.1\)](#)
- [Add a Server Node \(Manager v5.1\)](#)
- [Delete a Server Node \(Manager v5.1\)](#)
- [Monitor Space Server Performance \(Manager v5.1\)](#)

 Unknown macro: 'disable-content-rating-macro'

# Introduction to Server Nodes (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Add a Server Node \(Manager v17.10\)](#)
- [Add a Server Node \(Manager v5.1\)](#)
- [Delete a Server Node \(Manager v17.10\)](#)
- [Delete a Server Node \(Manager v5.1\)](#)
- [Introduction to Server Nodes \(Manager v17.10\)](#)
- [Introduction to Server Nodes \(Manager v5.1\)](#)
- [Monitor Space Server Performance \(Manager v17.10\)](#)
- [Monitor Space Server Performance \(Manager v5.1\)](#)
- [Update a Server Node \(Manager v17.10\)](#)
- [Update a Server Node \(Manager v5.1\)](#)

## Page Contents:

- [Overview](#)
- [View a List of Server Nodes](#)

## Overview

A server node in Transact Manager is a server running one or more other servers. Server nodes in Transact Manager can be configured to host the Transact Manager Management Console, host Form Spaces, and/or operate as background PDF receipt generators.

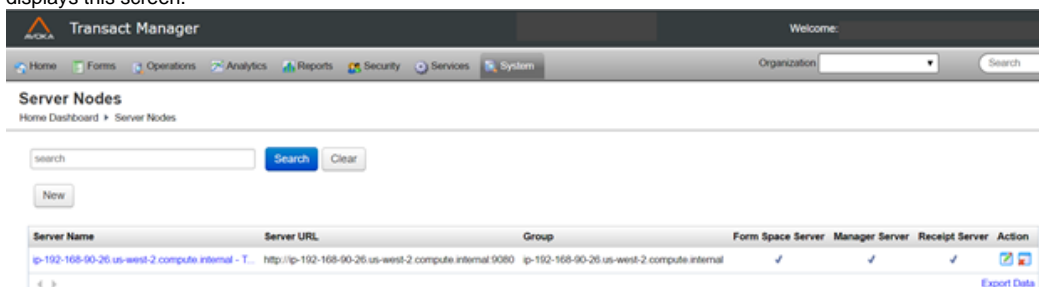
Transact Manager allows you to configure a single server node to host multiple servers. For example, a single server node can be configured to host both the Form Space Server and the Transact Manager Server. With the implementation of Transact Manager 5.1, receipt generation is handled, by default, by an individual server node.

Transact Manager creates default server nodes when it is initially installed. For example, a server node dedicated to PDF receipt generation is created when Transact Manager 5.1 is installed. Though these server nodes are installed automatically, it is still important that you confirm the configuration settings of each of these server nodes (including the IP address and credentials) to ensure that each operates as expected in the TM environment.

## View a List of Server Nodes

To view the list of server nodes currently configured in the TM environment:

1. Navigate to *System* from the menu bar. Navigating to this option will display the *System* dropdown menu.
2. Select *Server Nodes*. Selecting *Server Nodes* will direct you to the *Server Nodes* screen and display the list of server nodes that are currently configured in your instance of Transact Manager. The screenshot below displays this screen.



You may filter this list of server nodes by entering a substring of the server node name into the search box and clicking the *Search* button.

Each server node in the list contains the following:

- *Server Name* – The server name uniquely identifies the server node.
- *Server URL* – The server URL is the unique URL that directs to the server node.
- *Group* – The local data server group that the server node belongs to.
- *Form Space Server* – If selected, the server node acts as a form space server that handles and hosts web traffic and form spaces.
- *Manager Server* – If selected, the server node acts as a Transact Manager console server that supports development and operations staff.
- *Receipt Server* – If selected, the server node acts as a background PDF receipt generation server.
- *Action* – From this page, for a specific server node, you may perform the following actions:

Icon	Action for the Server Node
	View and/or change (same as clicking on the link in the <i>Server Name</i> column, refer to <i>Update a Server Node</i> section)
	Delete (before choosing to delete a user account please refer to <i>Delete a Server Node</i> section)

If you wish to export the list of server nodes to an Excel spreadsheet, click the *Export Data* link at the bottom of the list of server nodes.



# Update a Server Node (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Add a Server Node \(Manager v17.10\)](#)
- [Add a Server Node \(Manager v5.1\)](#)
- [Delete a Server Node \(Manager v17.10\)](#)
- [Delete a Server Node \(Manager v5.1\)](#)
- [Introduction to Server Nodes \(Manager v17.10\)](#)
- [Introduction to Server Nodes \(Manager v5.1\)](#)
- [Monitor Space Server Performance \(Manager v17.10\)](#)
- [Monitor Space Server Performance \(Manager v5.1\)](#)
- [Update a Server Node \(Manager v17.10\)](#)
- [Update a Server Node \(Manager v5.1\)](#)

## Update a Server Node

To configure and/or update an existing server node:

1. Navigate to the list of server nodes (*System > Server Nodes*).
2. Find the server node that you want to update/configure and click the link in the *Server Name* column, or click edit icon (🔗) in the action column of the list. Clicking either of these selections will direct you to the *Edit Server Node* page. The screenshot below displays this page.

The screenshot shows the 'Edit Server Node' page in the Transact Manager interface. The page title is 'Edit Server Node' and the breadcrumb is 'Home Dashboard > Server Node'. The form contains the following fields and sections:

- Server Node Details:**
  - Server Name:
  - Server Node URL:
  - Server Host Name or IP Address:
  - Server Group:
- Form Space Server:**
  - Form Space Portal Server:
- Transact Manager Server:**
  - Transact Manager Server:
- Transact Receipt Server:**
  - Transact PDF Receipt Server:

At the bottom of the form are 'Save' and 'Close' buttons.

3. Configure/Update the server node by selecting the appropriate server checkbox. Remember that a server node may be configured to host one or multiple servers. Also, to deactivate any of the servers for a server node, unselect the server (using the checkboxes).
  - a. Select the *Form Space Server* checkbox to implement the server node to act as a form space server that handles and hosts web traffic and form spaces.
  - b. Select the *Transact Manager Server* checkbox to implement the server node to act as a Transact Manager console server that supports development and operations staff.
  - c. Select the *Transact Receipt Server* checkbox to implement the server node to act as a background PDF receipt generation server.
4. Click the *Save* button. Clicking the *Save* button will save the current server node configurations.

# Add a Server Node (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Add a Server Node \(Manager v17.10\)](#)
- [Add a Server Node \(Manager v5.1\)](#)
- [Delete a Server Node \(Manager v17.10\)](#)
- [Delete a Server Node \(Manager v5.1\)](#)
- [Introduction to Server Nodes \(Manager v17.10\)](#)
- [Introduction to Server Nodes \(Manager v5.1\)](#)
- [Monitor Space Server Performance \(Manager v17.10\)](#)
- [Monitor Space Server Performance \(Manager v5.1\)](#)
- [Update a Server Node \(Manager v17.10\)](#)
- [Update a Server Node \(Manager v5.1\)](#)

## Add a Server Node

Though server nodes are created when Transact Manager is installed, there may be times where you may need to add new server nodes to an instance of Transact Manager. The main reason to add a server node to Transact Manager is to set up server nodes that play individual roles. For example, a server node may be added and configured as a server dedicated to hosting form spaces or background PDF receipt generation.

To add a server node to an instance of Transact Manager:

1. Select *System > Server Nodes*.

2. Click the *New* button.

Clicking the *New* button will direct you to the blank *Edit Server Node* page. The screenshot below displays this page.

The screenshot shows the 'Edit Server Node' page in the Transact Manager interface. The page has a navigation bar at the top with links for Home, Forms, Operations, Analytics, Reports, Security, Services, and System. Below the navigation bar, the page title is 'Edit Server Node' and the breadcrumb is 'Home Dashboard > Server Node'. The main content area contains a form with the following sections:

- Server Node Details:** Four text input fields with asterisks, each followed by a help icon: 'Server Name', 'Server Node URL', 'Server Host Name or IP Address', and 'Server Group'.
- Form Space Server:** A section with a checkbox labeled 'Form Space Portal Server' which is checked.
- Transact Manager Server:** A section with a checkbox labeled 'Transact Manager Server' which is checked.
- Transact Receipt Server:** A section with a checkbox labeled 'Transact PDF Receipt Server' which is checked.

At the bottom of the form are two buttons: 'Save' and 'Close'.

3. Enter the server node details:

- Enter a name for the server node into the *Server Name* field. This name must be unique and is strictly for description and identification of the server node.
- Enter the URL address that directs to the server node into the *Server Node URL* field. This URL should use the domain name if one has been created. An example of this URL is `http://USR-UserA:8080`.
- Enter the server node's network host name or IP address into the *Server Host Name or IP Address* field.
- Enter the name of the server group that the server node belongs to into the *Server Group* field. This is only used for description and identification. Generally, all server nodes that can communicate through the same network should be grouped into the same server group. If your Transact Manager deployment consists of multiple sets of servers that cannot communicate through the same network, each set of servers needs to be in a separate server group.
- Select one or more of the available servers.
  - Select the *Form Space Portal Server* checkbox, if the server node will host form spaces and handle public facing web traffic.
  - Select the *Transact Manager Server* checkbox, if the server node is a Transact Manager console server which will support development and operations staff.
  - Select the *Transact PDF Receipt Server* checkbox, if the server node will operate as a background PDF receipt generator server.

4. Click the *Save* button to create the new server node.

Clicking the *Save* button will create the new server node and return you to the list of server nodes configured in Transact Manager.

# Delete a Server Node (Manager v5.1)




## Related Pages:

- [Add a Server Node \(Manager v17.10\)](#)
- [Add a Server Node \(Manager v5.1\)](#)
- [Delete a Server Node \(Manager v17.10\)](#)
- [Delete a Server Node \(Manager v5.1\)](#)
- [Introduction to Server Nodes \(Manager v17.10\)](#)
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- [Monitor Space Server Performance \(Manager v17.10\)](#)
- [Monitor Space Server Performance \(Manager v5.1\)](#)
- [Update a Server Node \(Manager v17.10\)](#)
- [Update a Server Node \(Manager v5.1\)](#)

## Delete a Server Node

Though it is not recommended, Transact Manager allows you to delete a server node. For better protection and future proofing, it is recommended that instead of deleting a server node, you make it inactive by editing the server node and deselecting the selected servers.

To delete a server node:

1. Select *System > Server Nodes* (if not already on the *Server Nodes* screen).
2. Find the server node that you want to delete and click the delete () icon.
3. Confirm your decision to remove the server node, by clicking *OK* from the popup dialogue box that will appear.

# Monitor Space Server Performance (Manager v5.1)

Unknown macro: 'redirect'

## Related Pages:

- [Add a Server Node \(Manager v17.10\)](#)
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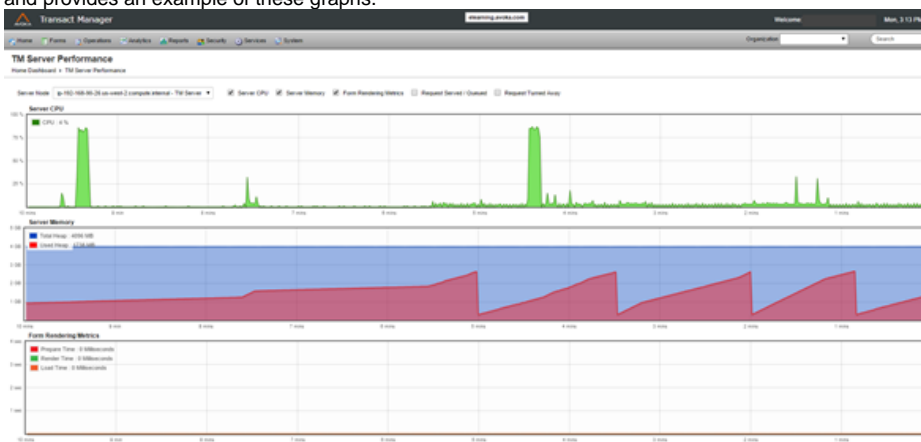
## Monitor Space Server Performance

Transact Manager offers a set of graphs that illustrate real-time performance measurements for a selected server node. The following performance measurements can be illustrated in graph form (one graph for each measurement).

- Server CPU
- Server Memory
- Form Rendering Metrics
- Request Served/Queued
- Request Turned Away

To view the graphs:

1. Navigate to *Operations* from the menu bar and then click *TM Server Performance* from the dropdown menu. Clicking *TM Server Performance* will direct you to the *TM Server Performance* page. This page displays a set of performance measurement graphs. The screenshot below displays this page and provides an example of these graphs.



2. Select the server node that you want to view performance measurements for by using the Server Node dropdown. You can also filter the performance measurements that will be illustrated in graph form by selecting or deselecting the checkboxes next to the Server Node dropdown. Each checkbox represents a different performance measurement.

# Outgoing Email (Manager v5.1)

 Unknown macro: 'redirect'

## Outgoing Email

Transact Manager uses email processes to produce a variety of notifications to both administrators and space users. This section of the Transact Manager 5.1 Documentation discusses configuring an [SMTP](#) server and the processes that are used to send emails from the TM Management Console.

Transact Manager requires an SMTP server to send its emails. Please note that currently, Transact Manager does not process incoming emails.

Emails are sent for many purposes, such as sending a link for the user to download a PDF receipt of their completed transaction or directly emailing the PDF receipt to the form user. Emails can be scheduled using the *Email Queue*. The Email Queue provides a mechanism to send arbitrary emails. It keeps track of emails and their statuses and sends them with a configurable number of retries.