Avoka Transact

Transact Manager (Manager v17.10)

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Transact Manager v17.10

This documentation is related to the latest Transact Manager release.

Looking for an earlier TM release? Please see Transact Manager - Previous Release Documentation for more information.

Search Manager Documentation

What's New

View the Manager Release Notes for information on new features and changes to Manager 17.10.

Documentation Content

- Introduction to Transact Manager (Manager v17.10)
- Transact Manager Configuration (Manager v17.10)
- Maestro Form Configuration in TM (Manager v17.10)
- System Configuration (Manager v17.10)

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 v17.10)

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Overview

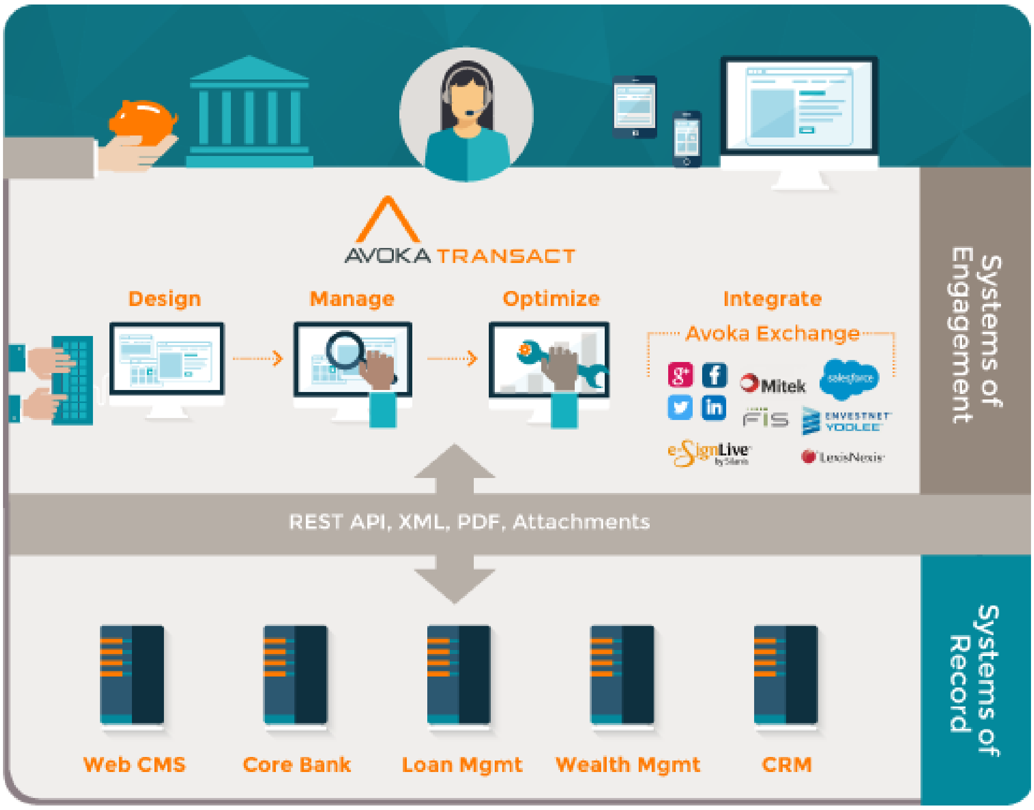
Transact Manager is the heart of the Avoka Transact platform. It is a System of Engagement, purpose-built to manage the end user experience for account opening, onboarding and account servicing, and submitting a complete application package to the back office systems of record.

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 experience 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.

The image below illustrates the Avoka Transact platform.



Transact Manager Topics

Transact Manager Configuration (Manager v17.10)

Unknown macro: 'redirect'

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

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

- Organization Configuration (Manager v17.10)
- User Accounts (Manager v17.10)
- Form Spaces (Manager v17.10)
- System Logs (Manager v17.10)
- Configure Virus Scanning for Attachments (Manager v17.10)
- Core Global Services (Manager v17.10)

Organization Configuration (Manager v17.10)

Unknown macro: 'redirect'

Overview

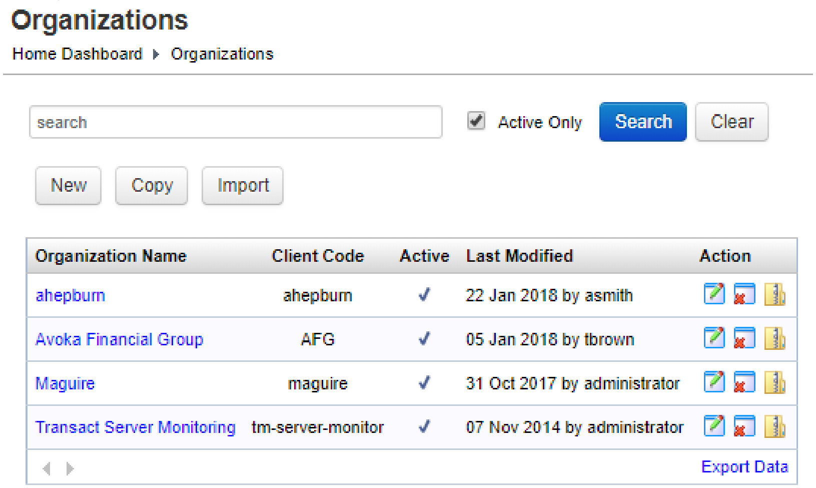
An organization in Transact Manager is a sub-group of users (usually developers) who all share a common location where they deploy and manage their own set of forms and transactions. Transact Manager is designed to accommodate anything from a single organization with a single form, to multiple organizations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



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. An 'Active' organization in Transact Manager is one that is currently in use in your instance of Transact Manager. You can also export the filtered search results as an Excel file by clicking the *Export Data* link below the table.

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)

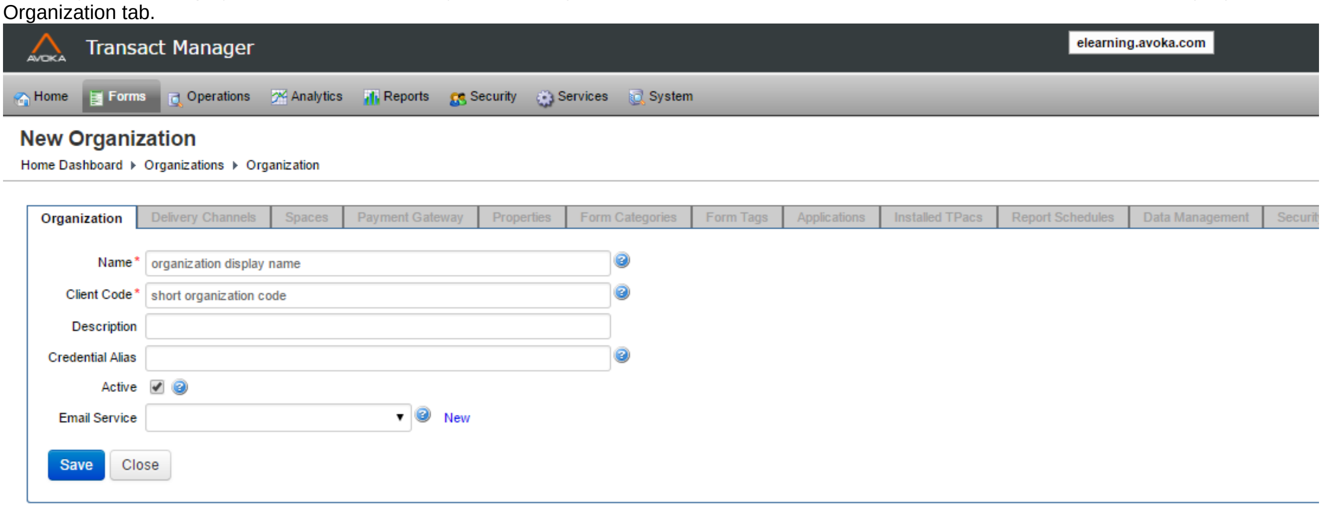
Create an Organization (Manager v17.10)

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.

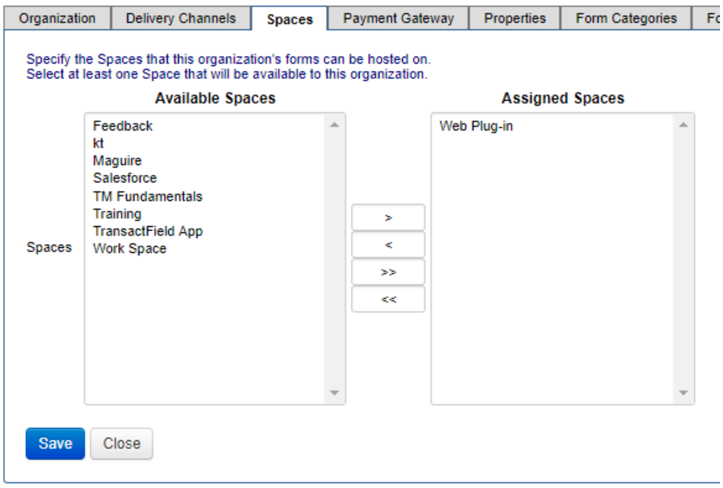
1. Select *Forms* > *Organizations* from the menu bar

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.
   

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 v17.10) 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*.
   

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 v17.10) 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.

Click each tab name below for more information.

Copy an Organization (Manager v17.10)

Unknown macro: 'redirect'

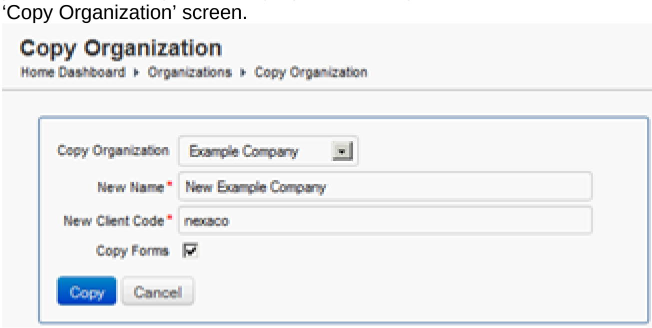
Copy an Organization

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.



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*.

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 (Manager v17.10)

Unknown macro: 'redirect'

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.

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)

User Accounts (Manager v17.10)

Unknown macro: 'redirect'

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

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

- User Accounts Overview (Manager v17.10)
- View the List of User Accounts (Manager v17.10)
- Create a New User Account (Manager v17.10)
- Change a User Account (Manager v17.10)
- Remove a User Account (Manager v17.10)
- Bulk Import of User Accounts (Manager v17.10)
- Roles (Manager v17.10)
- Groups (Manager v17.10)
- User Profiles (Manager v17.10)
- Permissions and Standard Roles (Manager v17.10)

User Accounts Overview (Manager v17.10)

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)

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 their login credentials in the form of a username (usually an email) and password.

The list below identifies the current transact spaces (sometimes referred to as modules) that are supported by the Transact platform.

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

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 and access permitted to the individual user. Transact Manager provides several 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). Roles will determine the kinds of privileges and capabilities that a user is 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 only need be granted to those users who are reviewers and managers of the form space (for more information on reviewers and managers, please see the Collaboration Jobs documentation).

A common consideration when working with user accounts is the environment (such as production, development and testing) that users are accessing. Transact Manager is designed to be customizable to accommodate an enterprise’s security configurations and policies.

For instance, the following list identifies several common users who will require a user account that has access to a production environment.

- End user - Will access, complete and submit forms.
- Operational Staff - Will monitor and manage submissions and jobs.
- Administrators - Will administer the security of the environment.
- Managers - Will view and analyze reports.
- Other Internal Staff such as a reviewer or manager - May approve or reject applications from customers.

Also, the following list identifies several common users who will require a user account that has access to a development and/or testing environment.

- Administrator - Will administer the security.
- Developer - Will create and configure forms as well as test them by simulating an end user experience.
- Tester - Will test forms by simulating an end user experience.

The table below identifies the details that can make up a user account.

Details	About
Personal data	User details
Credentials	User login name 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 v17.10)

Unknown macro: 'redirect'

Related Pages:

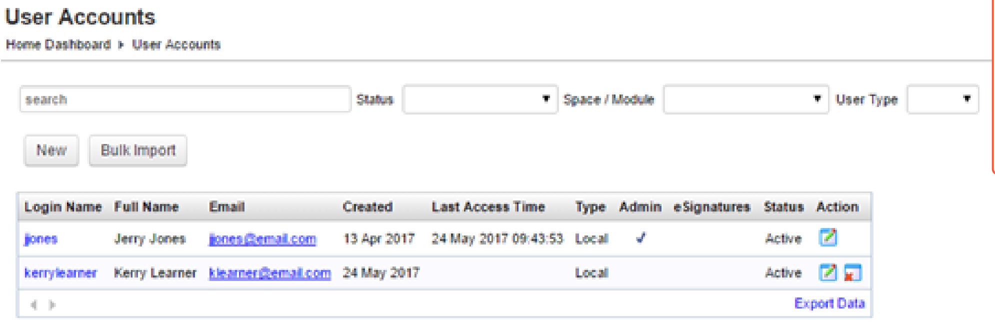
Error rendering macro 'contentbylabel'

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

View the List of User Accounts

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

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.



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 *Login Name* column)
	Delete (before choosing to delete a user account please refer to Remove a User Account (Manager v17.10)) You will be prevented from deleting a user account that is the: 1. User account you are currently logged in as. 2. System-generated account, *Root Administrator*

When your list of user accounts is long, you may wish to filter the list by one or more of the following options.

- 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).
- Select a status from the *Status* dropdown.
- Select a space from the *Space / Module* dropdown.
- Select a user type from the *Type* dropdown menu

Once you have added your filters, click the *Search* button.

To create a new user account, click the *New* button. The process of configuring a new user account is covered in the Create a New User Account (Manager v17.10) section.

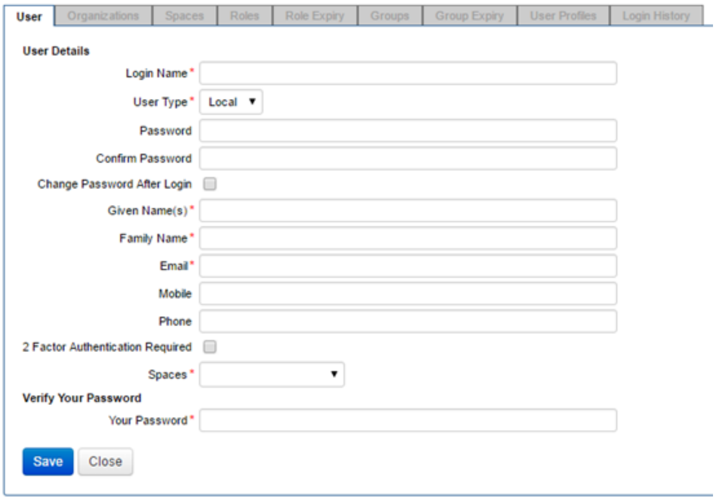
To export your list of user accounts to an excel spreadsheet, click the *Export Data* link.

Create a New User Account (Manager v17.10)

Unknown macro: 'redirect'

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

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 manage 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 manage 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 v17.10) section.

Create a Maestro Organization User Manager (Manager v17.10)

Unknown macro: 'redirect'

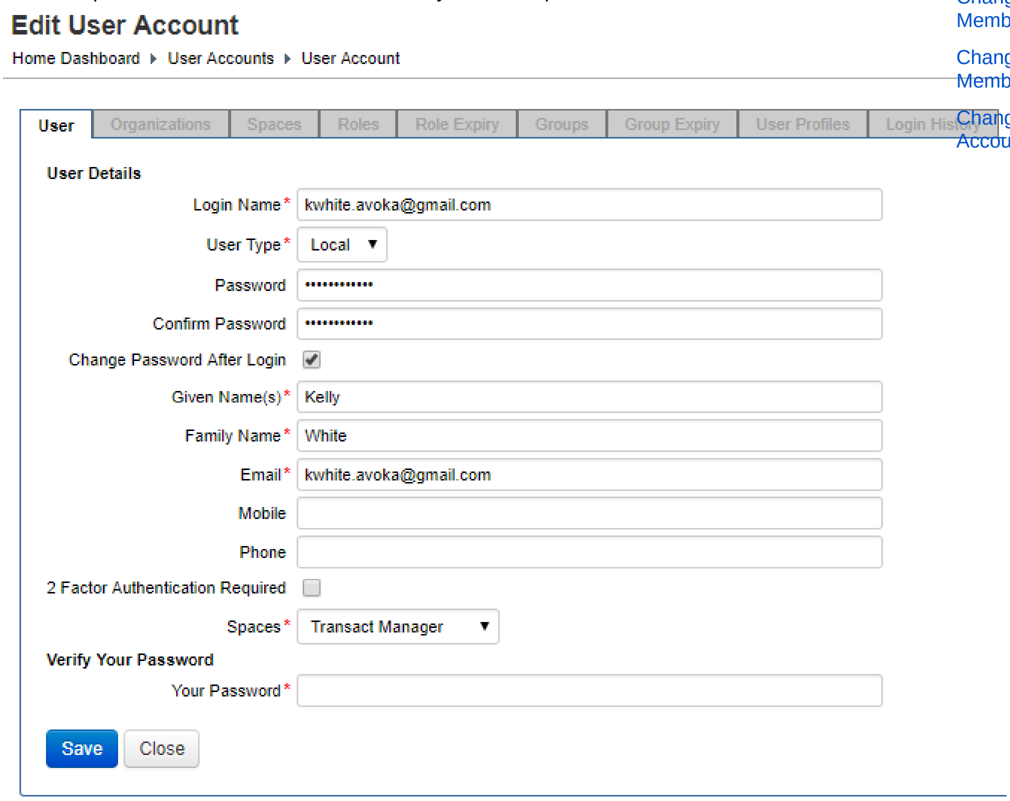
Related Pages:

- 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

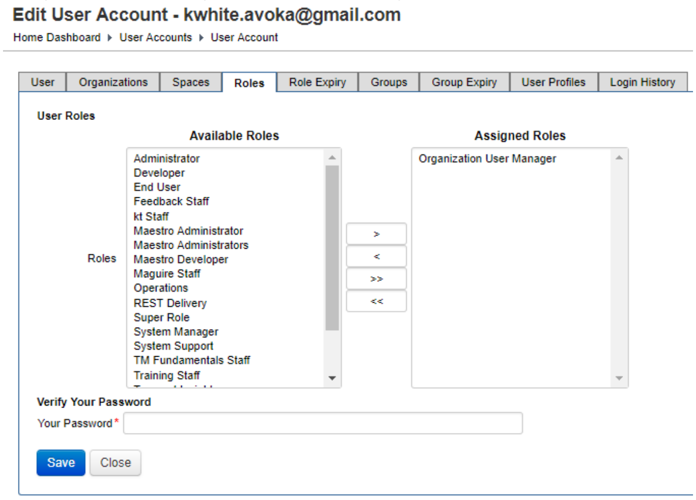
A Maestro Organization User Manager is able to create new users, edit user details and reset passwords. All security actions are conducted in the parent Transact Manager environment.

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.



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

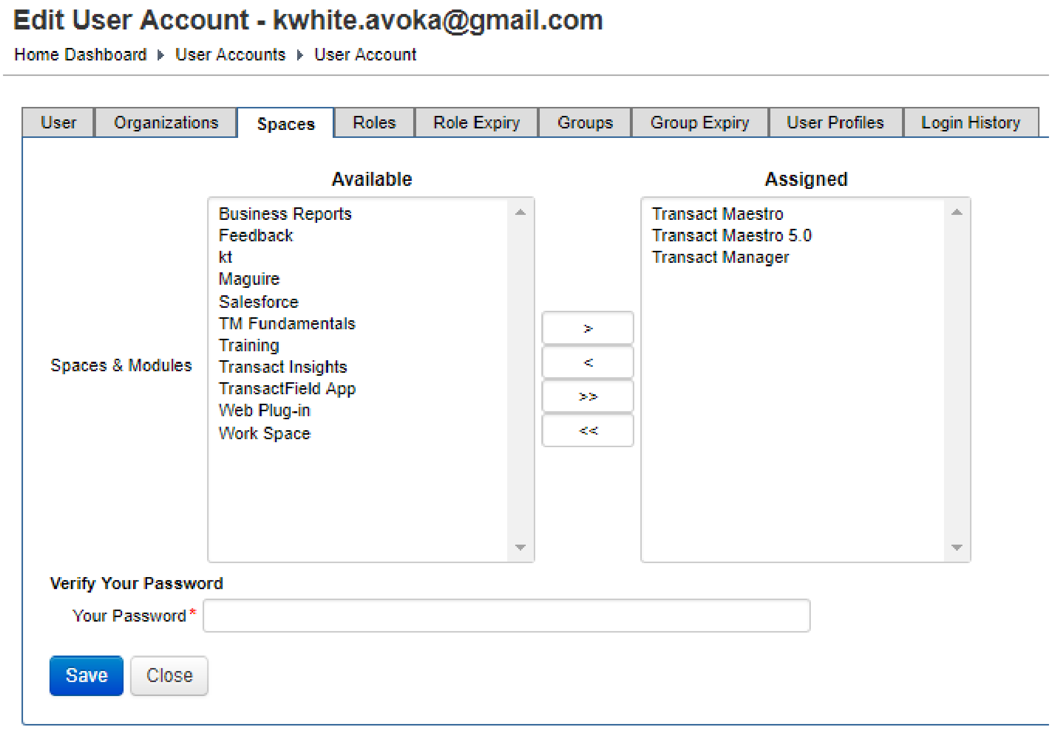
6. Assign the user the *Organization User Manager* role.



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

8. Click *Save*.

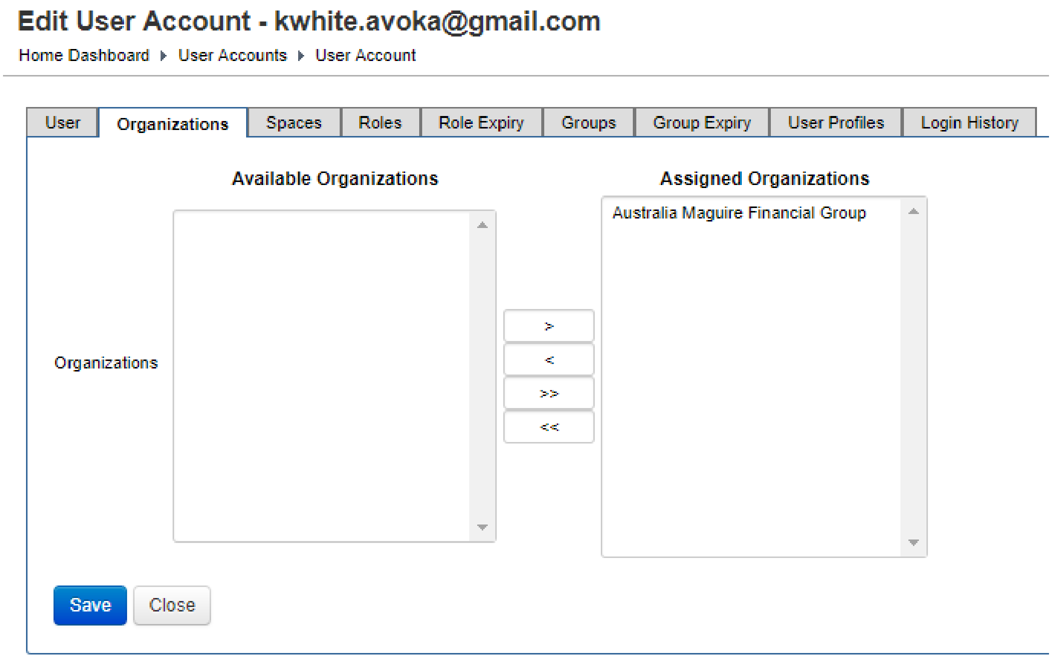
9. Switch to the *Spaces* tab.
   From the User tab, you already set the user up with the Transact Manager space. They also need access to the two Transact Maestro spaces, *Transact Maestro* and *Transact Maestro 5.0*.



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.



13. Click *Save*.

Create a New User Account - Quick Guide (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

Error rendering macro 'contentbylabel'

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

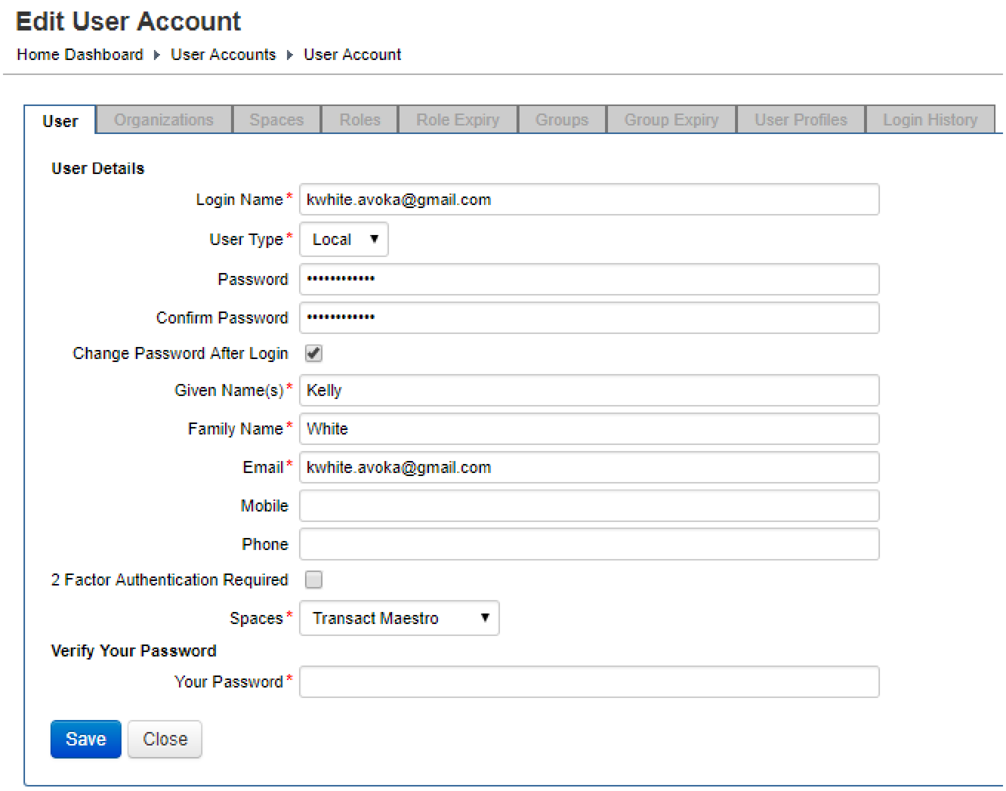
Page Contents:

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 v17.10).

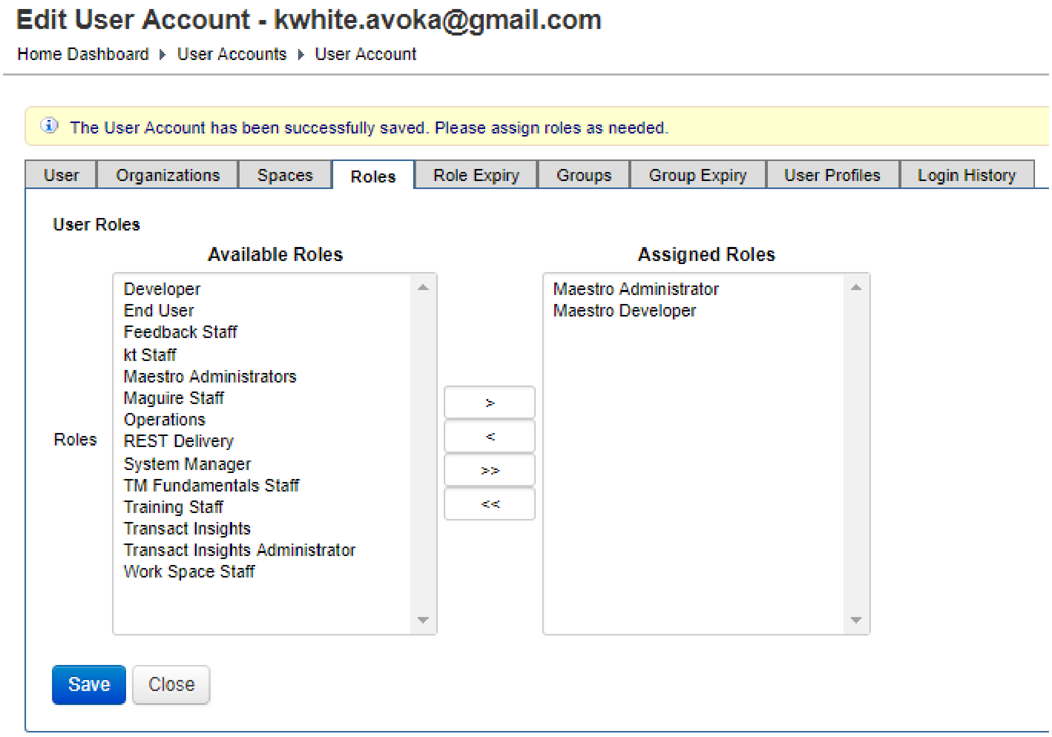
Create a New User Account (Maestro shared environment access only)

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.

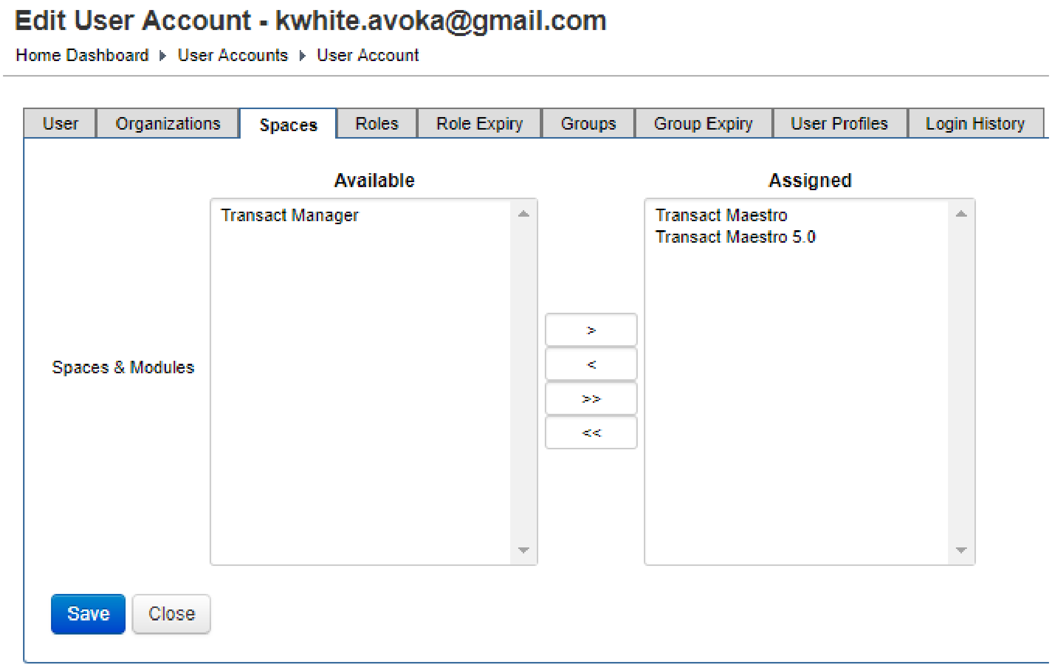


4. Enter your *password* in the field provided.
5. Click *Save*.
   Clicking Save will automatically switch you to the Roles tab.
6. Assign the user the required *Maestro roles*.
   At the moment there are two roles for Maestro users. TM access is not required, so do not assign TM roles.
    a. Maestro 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.



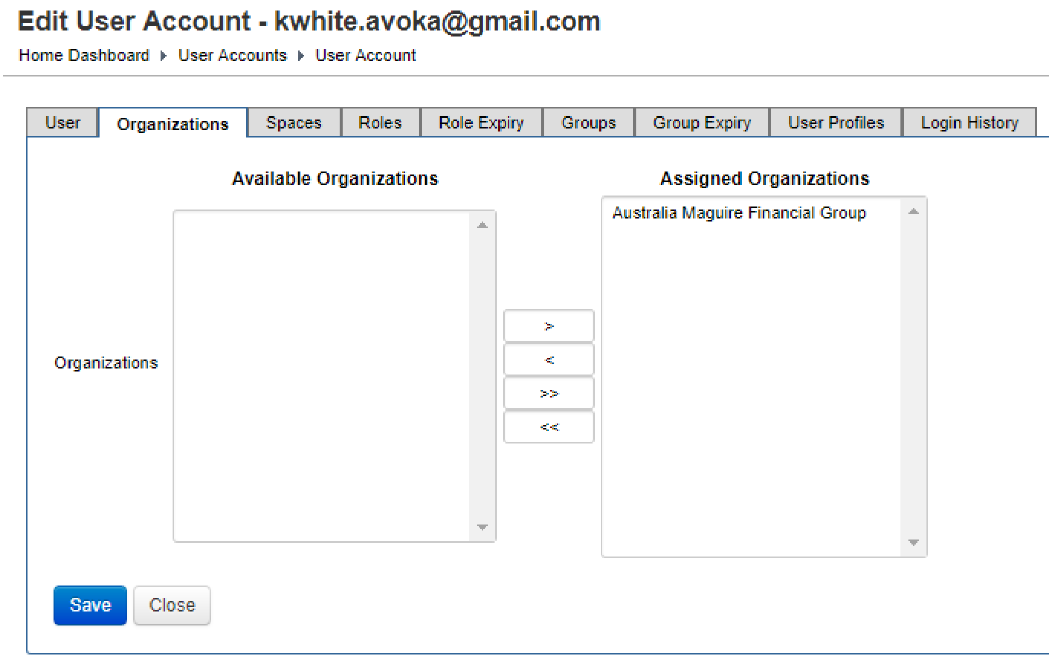
7. Click *Save*.

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 5.0, you need to add the Transact Maestro 5.0 space.



9. Click *Save*.

10. Switch to the *Organizations* tab.
    Assign them to the Organization they belong to. **Do NOT** assign global access.



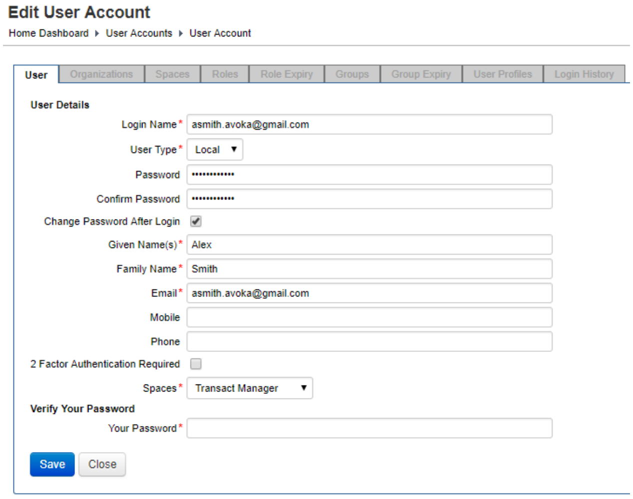
11. Click *Save*.

Create a New User Account (Transact Manager access only)

1. Select the *Security* menu, then click *User Accounts*.

2. Click the *New* button.

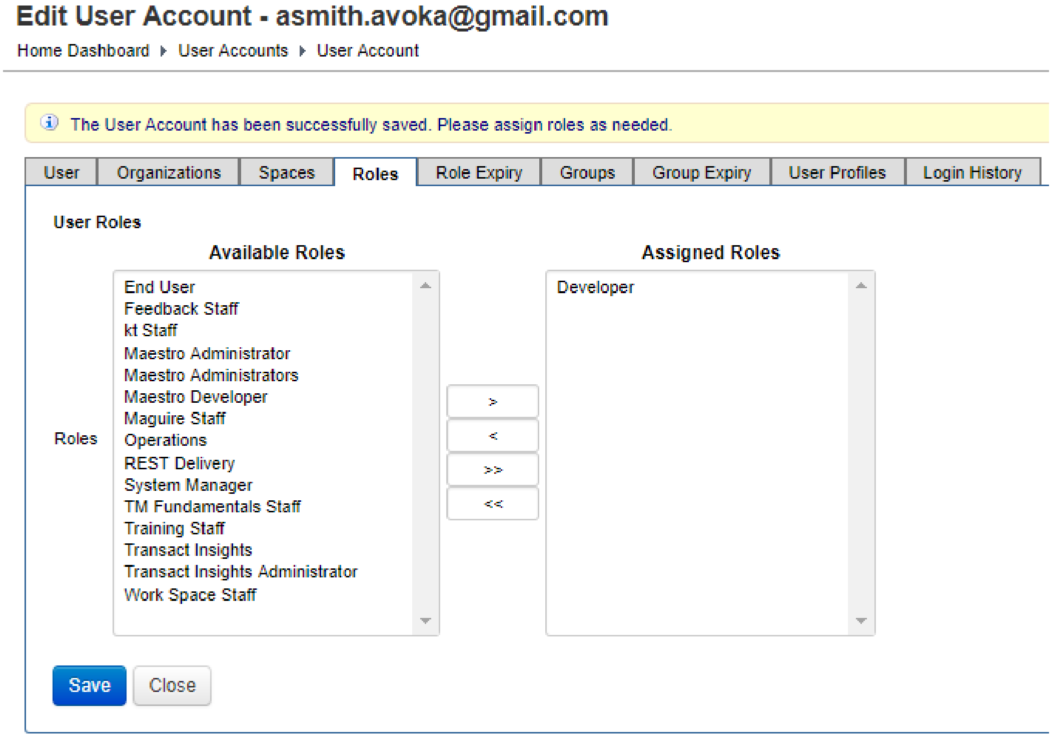
3. Fill in the details with the following rules.
    a. **Login Name** - This is always the user's email address.
    b. **Password / Confirm Password** - Passwords must be at least 12 characters and be mixed case, contain at least 1 numeric and 1 special character.
    c. Ensure **Change Password After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



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

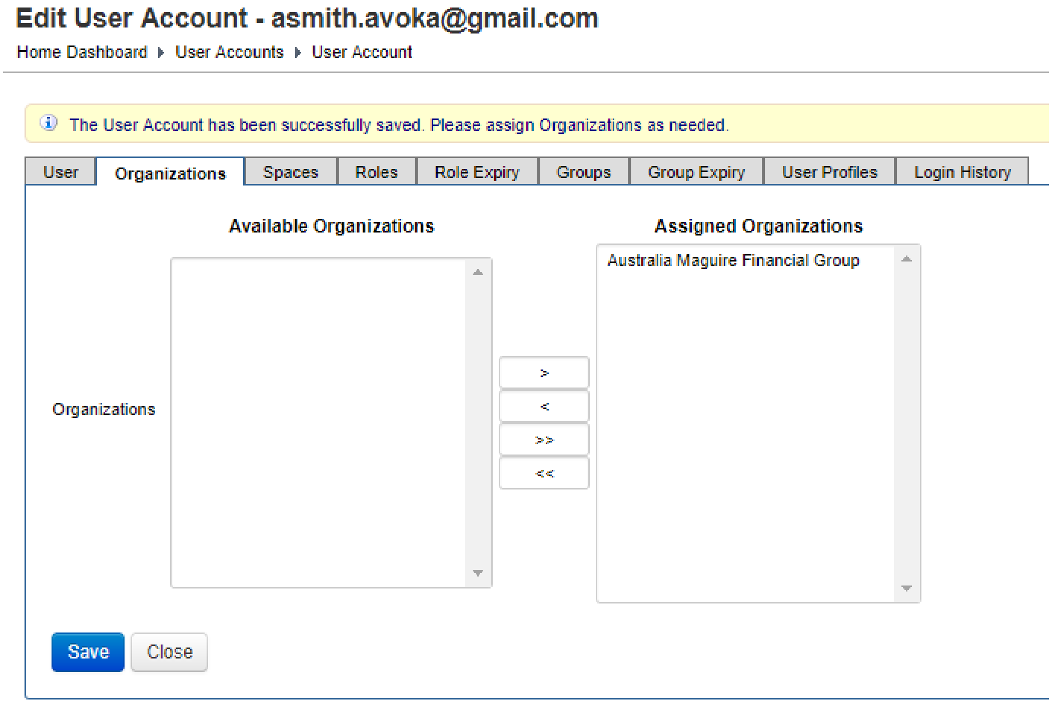
5. Click *Save*.
   Clicking Save will automatically switch you to the Roles tab.

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



7. Click *Save*.

8. Switch to the *Organizations* tab.
Assign them to the Organization they belong to.



9. Click *Save*.

Assign Roles to User Account (Manager v17.10)

Unknown macro: 'redirect'

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.

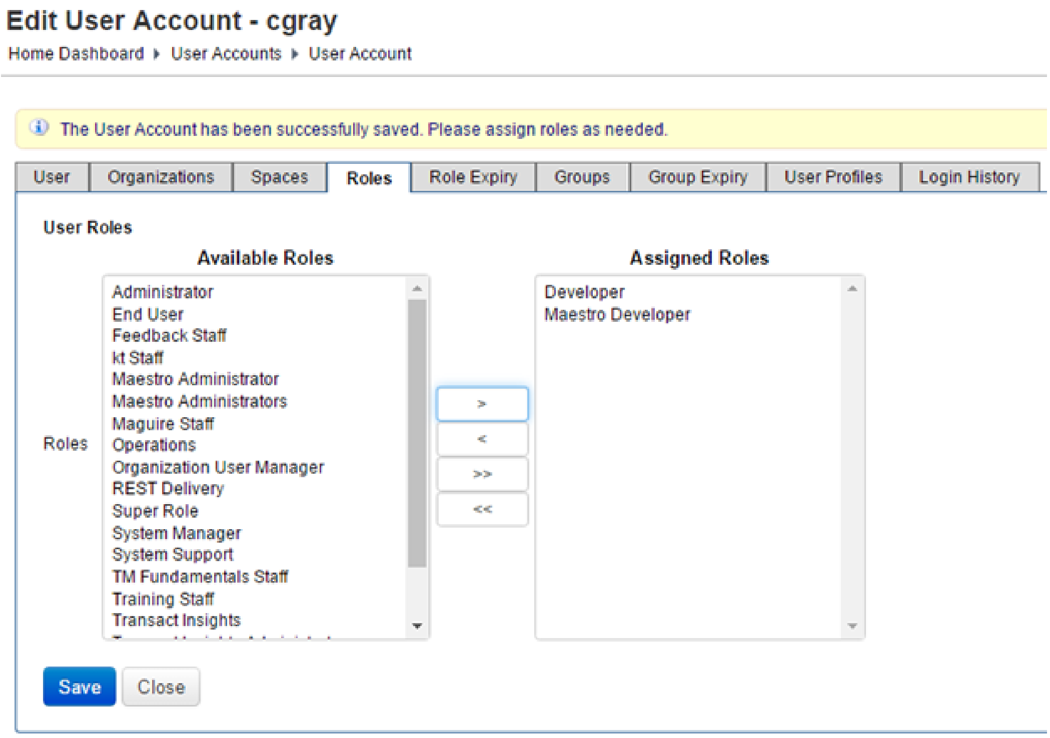
4. To change the roles assigned to the user account:
    a. Select the role(s) from the *Available Roles* section (on Windows, use the *Shift* and *Ctrl* keys to select multiple roles).
    b. Click the *>* to assign roles and/or click the *<* button to remove roles.
    c. You can also add all available 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.

Related Pages:

Error rendering macro 'contentbylabel'

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

6. 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.



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 v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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).

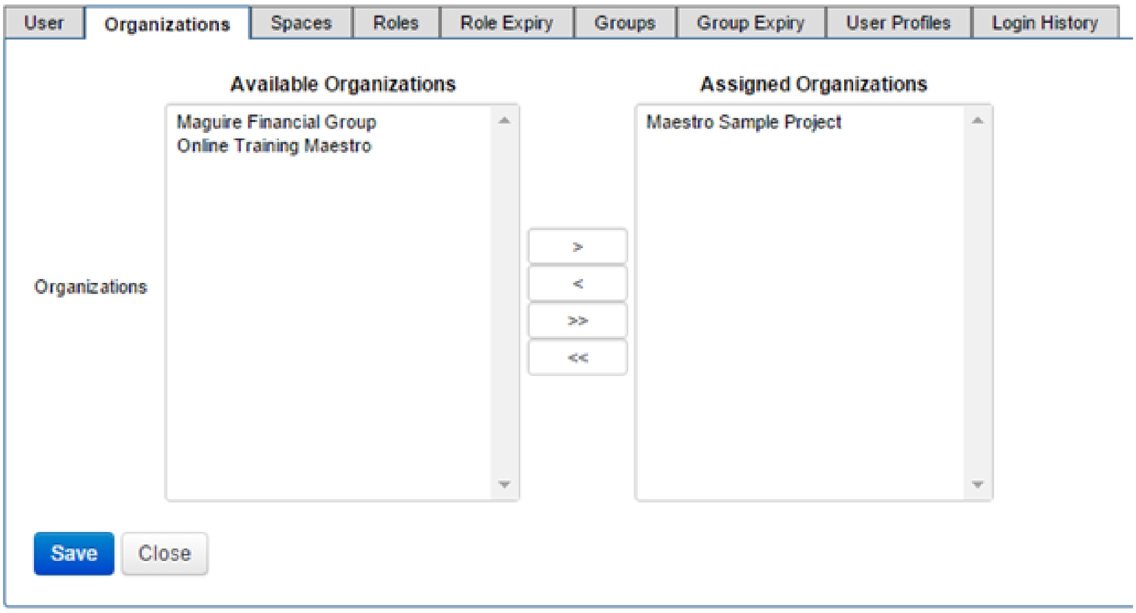
Assign Organizations to User Account

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.

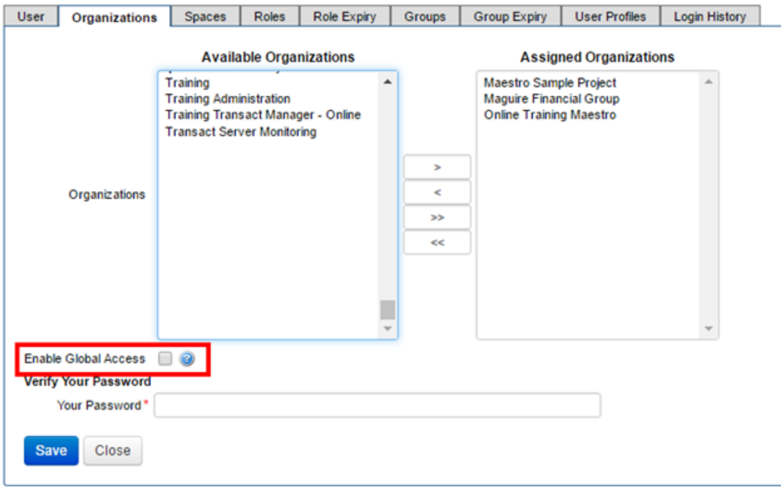
   The list of *Available Organizations* displayed will depend on whether you are logged in as a global administrator or as an organization administrator. Global administrators will have all organizations listed in the *Available Organizations* section, but only those organizations granted to an organization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

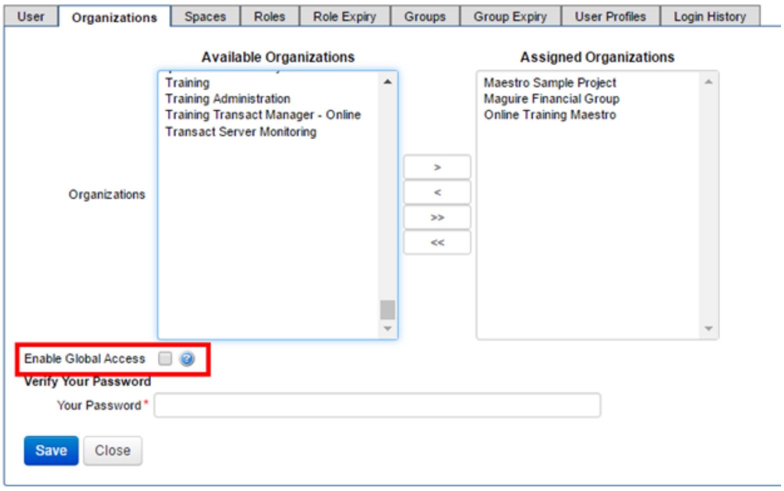
2. Find and select the user account from the list (either click the *Edit* icon () in the *Action* column or the link in the *Login Name* column).

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.



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 v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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 T*ransact 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.

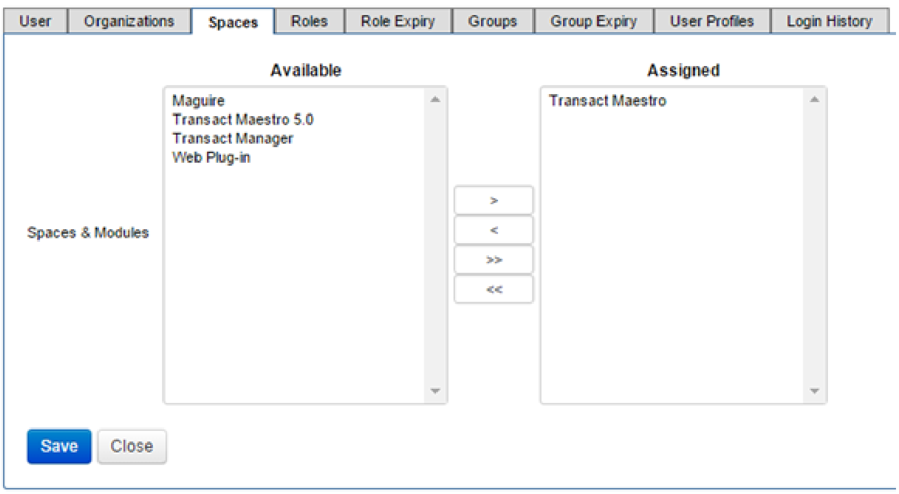
Change the Spaces Assigned to a User Account

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* secti on.
To change the assigned spaces:

   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 v17.10)

Unknown macro: 'redirect'

Change a User Account

There are often times when 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 *User* tab.

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.

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)

Remove a User Account (Manager v17.10)

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

If you wish to disable a user account, Transact Manager offers the following options.

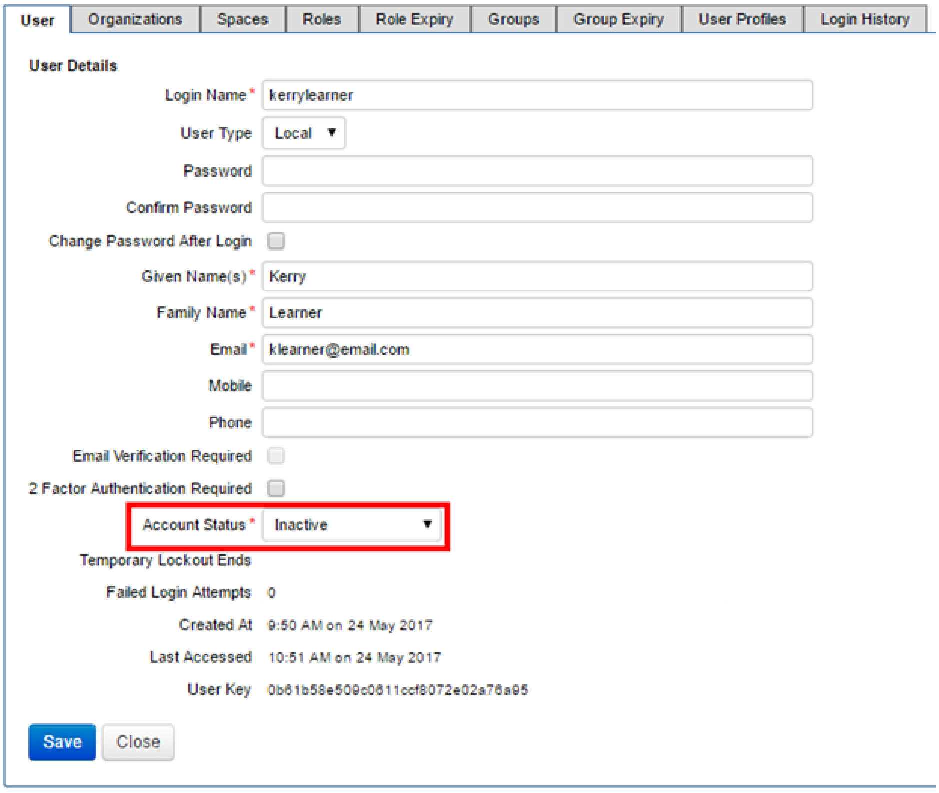
- Deactivate the account, to prevent a user to log in using his/her credentials, but will preserve the user details in Transact Manager.
- Delete the user account, which irrevocably removes all data associated with the user account.

Note that submissions made by a user will be preserved even after their user account is deleted. However, these submissions will no longer be associated with a user account. In most cases, it is recommended that you deactivate rather than delete a user account. As all user account details are preserved even after the account has been deactivated, deactivation of a user account can 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 menu.
4. Click the *Save* button if you wish to save any changes made, otherwise click the *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 menu, and then click the *Save* button.

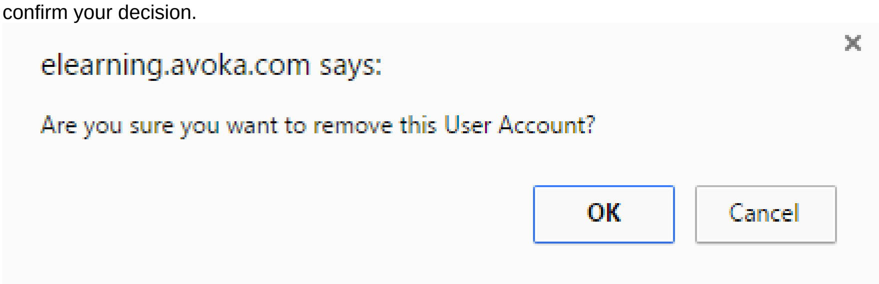


Delete a User Account

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.

Bulk Import of User Accounts (Manager v17.10)

Unknown macro: 'redirect'

Bulk Import of User Accounts

To make it easier to create a set of users, Transact Manager allows you to bulk import user accounts defined in an Excel spreadsheet.

For security reasons, the following considerations apply when choosing to bulk import a set of user accounts:

- Only local users can be created.
- Users can only be associated with spaces used to host forms (form spaces), but not other spaces such as the Transact Manager console. The missing spaces assignments may be done manually after importing.
- In the case of finding a user account with the same *Login Name* in Transact Manager, that user account will not be imported (ignores duplicates).

Related Pages:

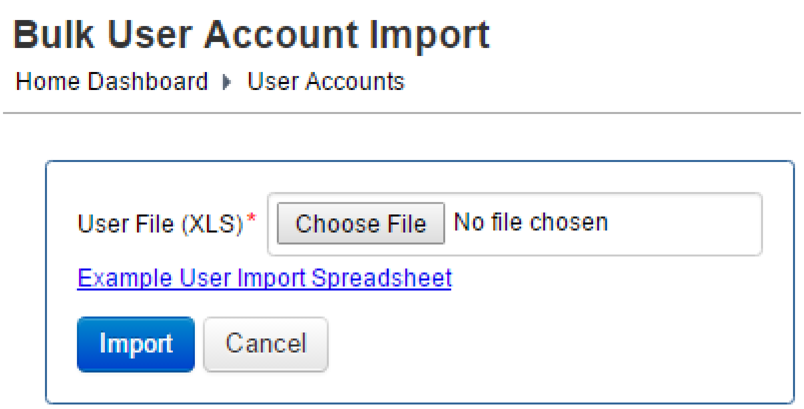
Error rendering macro 'contentbylabel'

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

Follow the steps below to bulk import a set of user accounts from an Excel spreadsheet.

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

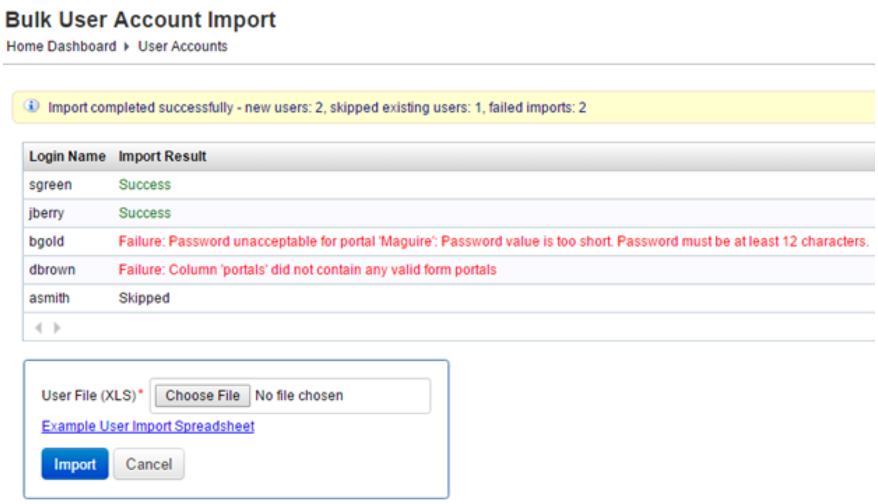
2. Click the *Bulk Import* button. The *Bulk User Account Import* screen will appear as shown in the screenshot below.



> If this is your first bulk import of user accounts, click on the *Example User Import Spreadsheet* link to download a sample XLS file. This sample spreadsheet has sample user account details correctly formatted to assist you in entering user account details. That is, the XLS file you upload must follow a certain format (specifically the header column names need to be correct and are expected to be in a certain order).

3. Once you have a suitable XLS file containing the user accounts you want to import, follow the steps below to upload the file.
   a. In the *User File (XLS)* field, click the *Choose File* button.
   b. Find and select the XLS file you wish to import.
   c. Click the *Import* button.
4. The import file will be processed, and the import results will be displayed (see below for an example). In the detail table:
   - Users that were imported successfully are displayed at the top.
   - Followed by users for which an error occurred (such as, a mandatory column not set).
   - Finally, user accounts that were skipped because they already exist (duplicate *Login Name*) are displayed at the bottom.

For each error, you may choose to revise and fix your XLS import file and reimport it or alternatively, add each user account manually (*Create a New User Account (Manager v17.10)* section).


Bulk User Account Import
Home Dashboard
User Accounts
Import completed successfully - new users: 2, skipped existing users: 1, failed imports: 2
Login Name
Import Result
sgreen
Success
jberry
Success
bgold
Failure: Password unacceptable for portal 'Maguire': Password value is too short. Password must be at least 12 characters.
dbrown
Failure: Column 'portals' did not contain any valid form portals
asmith
Skipped
User File (XLS)*
Choose File
No file chosen
Example User Import Spreadsheet
Import
Cancel

Roles (Manager v17.10)

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.

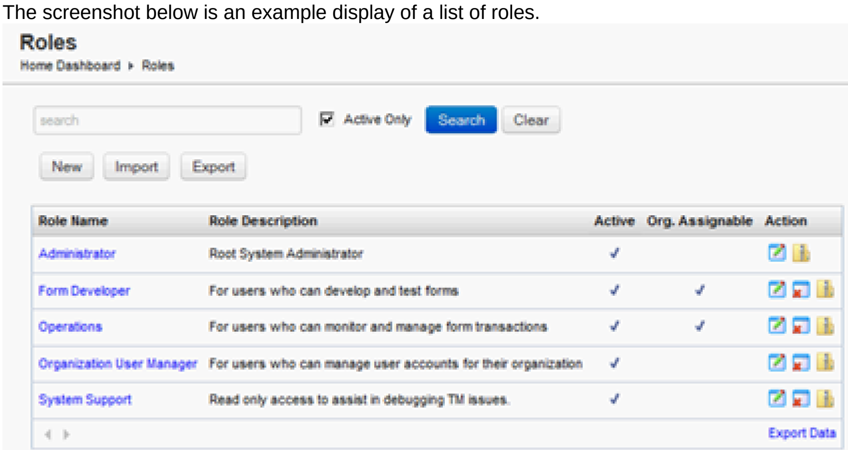
View the List of Roles

Transact Manager allows administrators to view the list of available TM roles.Viewing this list of roles in invaluable when assigning roles to users.

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

- Navigate to *Security* from the menu bar, and then click *Roles* from the dropdown menu (If you are logged in as a global administrator, you will see all available roles).

The screenshot below is an example display of a list of roles.



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.
By default, only active roles are listed (*Active Only* checkbox is ticked). If you wish to also see the inactive roles listed, deselect the *Active Only* checkbox.

The table below identifies and describes the additional options that are available from this screen.

Icon	Action
	View and/or change (same as clicking on the link in the *Role Name* column)
	Delete (before choosing to delete a role please refer to Remove a Role (Manager v17.10) section) The *Administrator* 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 the permissions assigned to roles, to import them 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 v17.10), 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 v17.10)

Unknown macro: 'redirect'

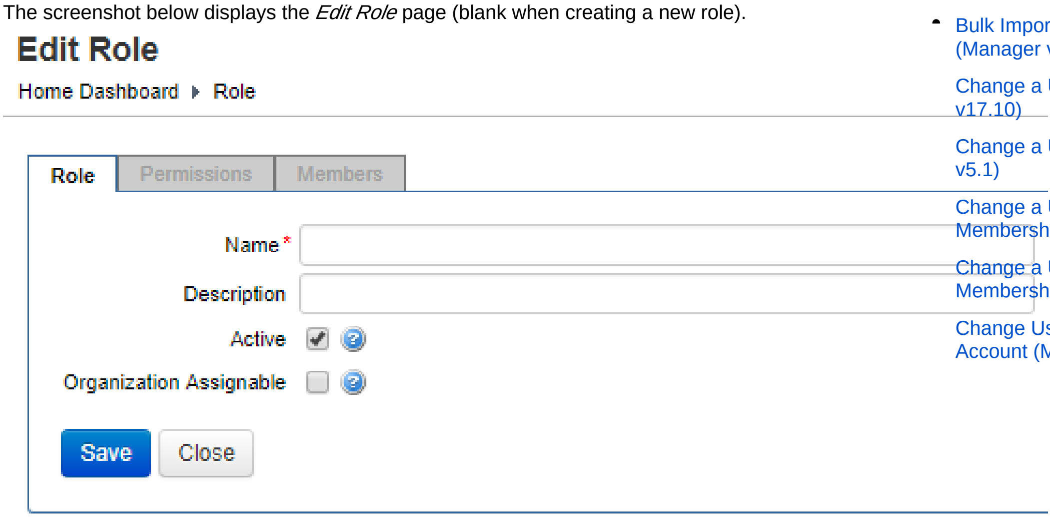
Related Pages:

- 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

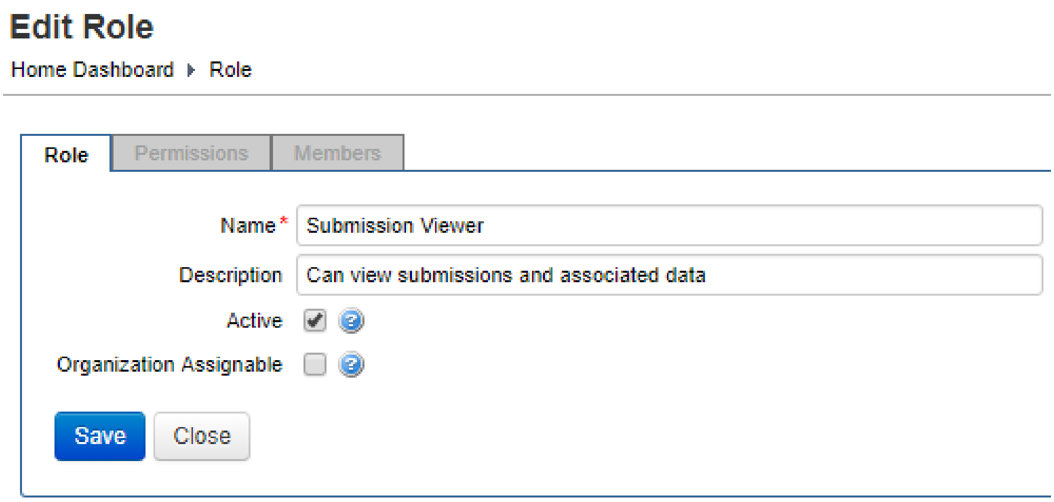
New roles can be created as needed. Follow the steps below to create a new role.

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).



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 *Orga nization 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.



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 v17.10)

Unknown macro: 'redirect'

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.

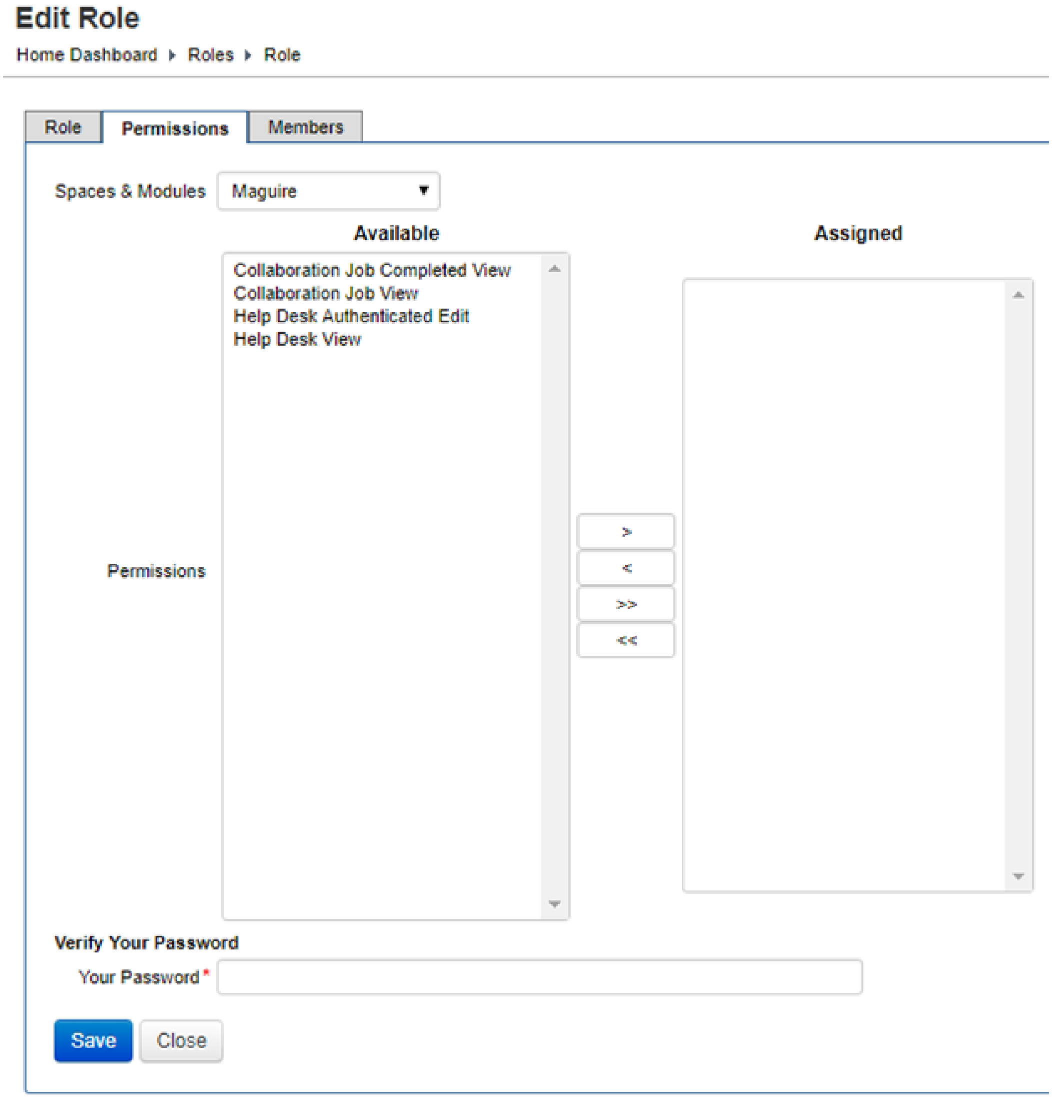
   A newly created role will not yet have any assigned permissions for any of the spaces.

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 *S hift* 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.

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)

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.



Manage Role Members (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

Error rendering macro 'contentbylabel'

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

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).

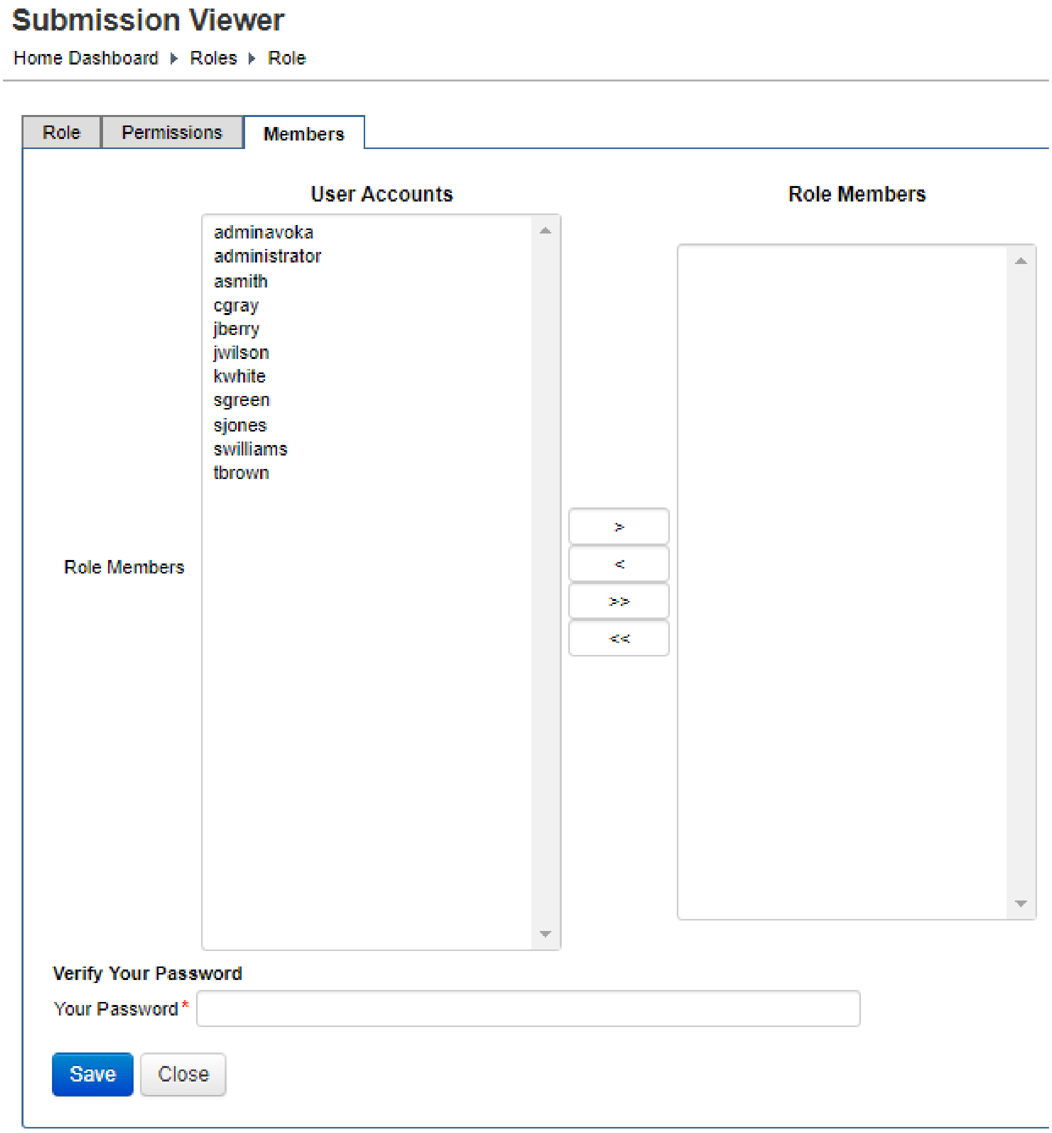
3. Switch to the *Members* tab. See the screenshot below.

   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.

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.



Remove a Role (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

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 v17.10)

Unknown macro: 'redirect'

Related Pages:

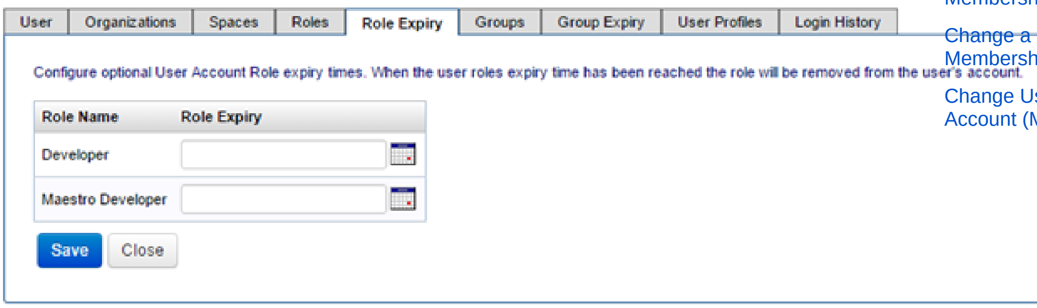
- Assign Permissions to a Role (Manager v17.10)
- Assign Permissions to a Role (Manager v5.1)
- Assign Roles to User Account (Manager v17.10)
- Assign Roles to User Account (Manager v5.1)
- Bulk Import of User Accounts (Manager v17.10)
- Change a User Account (Manager v17.10)
- Change a User Account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

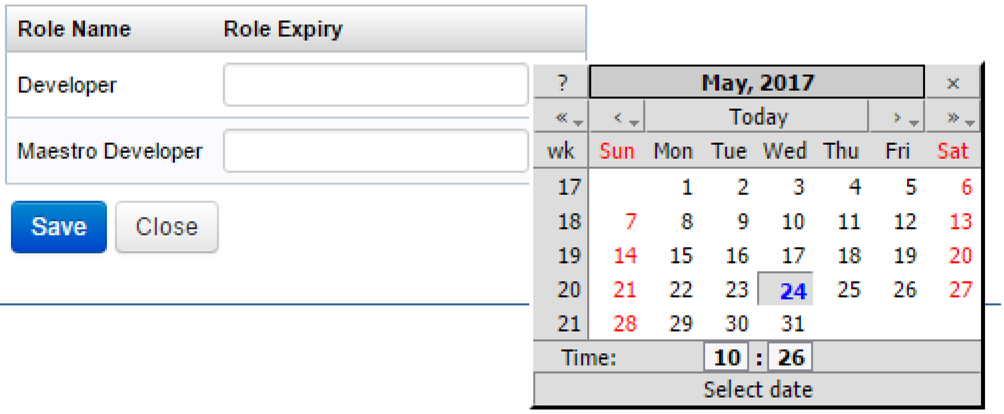
At times, it may be better to temporarily assign a role to a user, such as when allowing Avoka support to assist in debugging a problem. Within Transact Manager, it is possible to enforce an expiry time to a user's role.

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 v17.10)

Unknown macro: 'redirect'

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:

- **Alert** Notifying and alerting a group about certain events.
- **Form** Giving restricted access to forms and/or tasks that are associated with a group.
- **Job** Giving restricted access to job coordinators when overseeing jobs that they are responsible for. The job groups also enable job coordinators to filter their jobs by group from the *Reviews* tab.

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.

Job Groups

Groups that control job coordinators' access to jobs are called job groups. In addition, job groups assist job coordinators by being able to filter jobs by group.

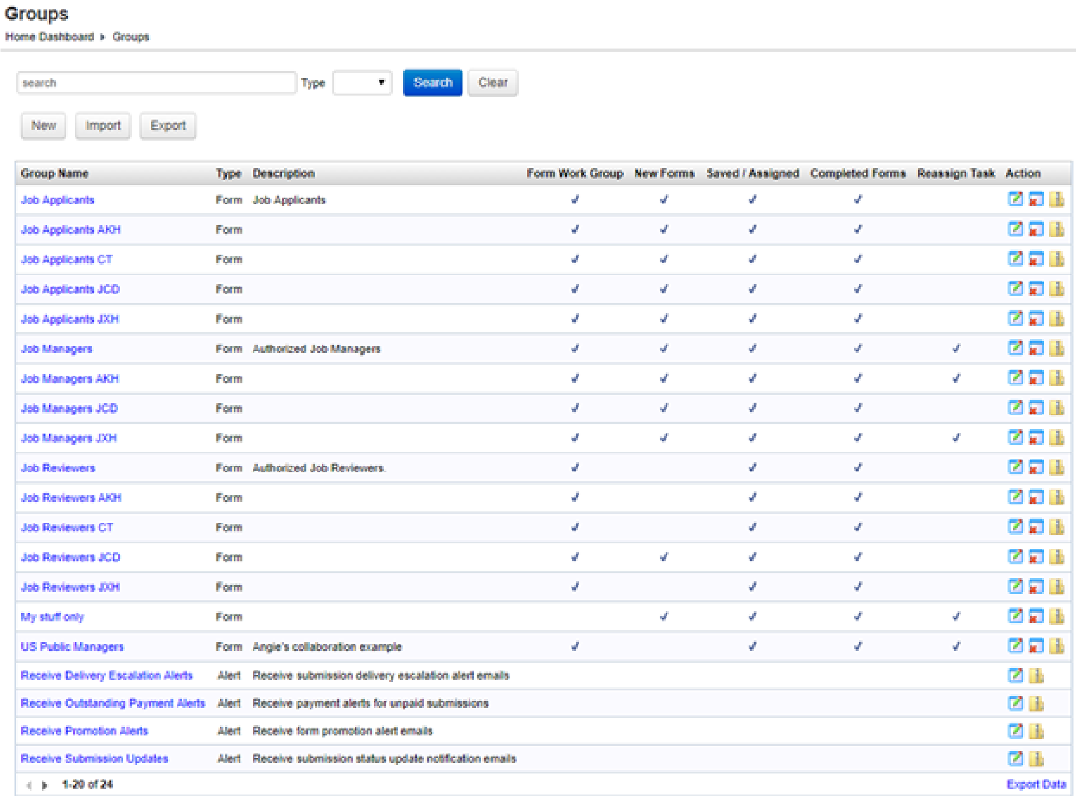
View the List of Groups

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.


Groups

Home Dashboard ▸ Groups

search | Type | Search | Clear

New | Import | Export

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

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 menu.
A set of standard alert groups are predefined and cannot be renamed or deleted.

The table below identifies and describes the additional options available from the List of Groups screen.

Icon	Action
	View and/or change (same as clicking on the link in the *Group Name* 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 v17.10)* 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 v17.10)*, *Migrate Groups (Manager v17.10)* section.

Create a New Group (Manager v17.10)

Unknown macro: 'redirect'

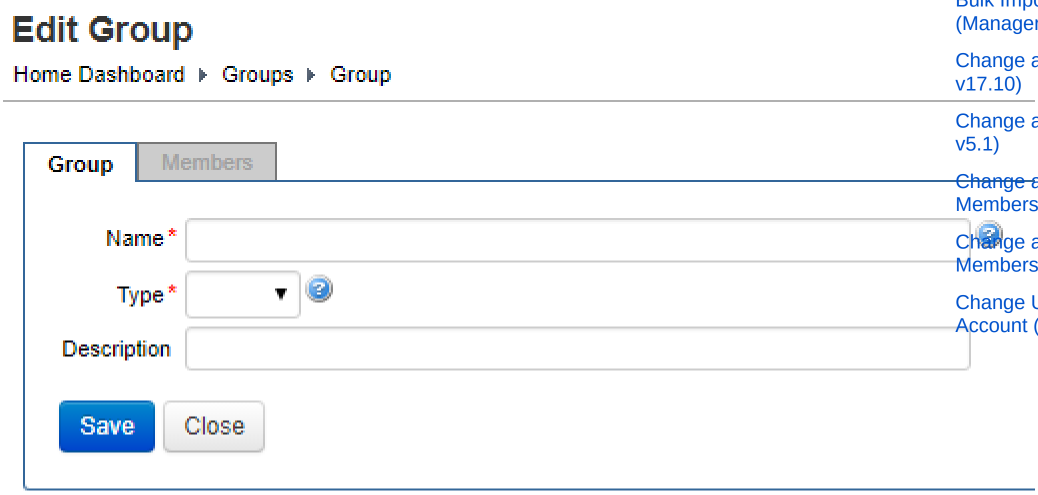
Related Pages:

- 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)

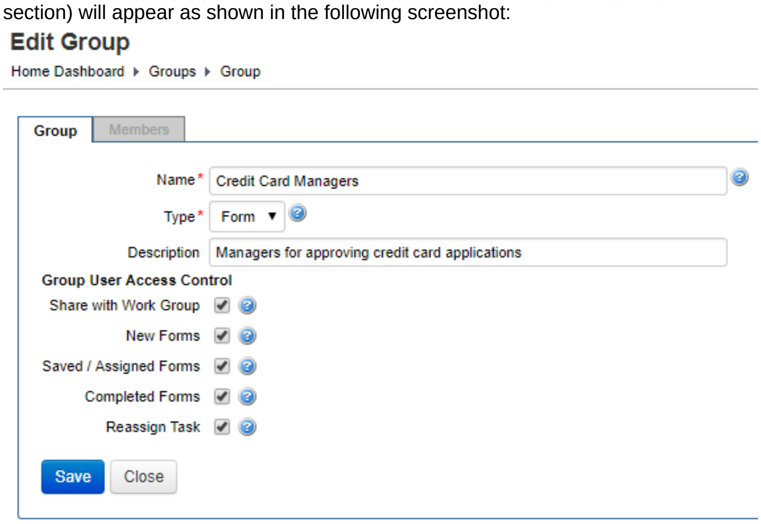
Create a New Group

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).



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:



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 v17.10)

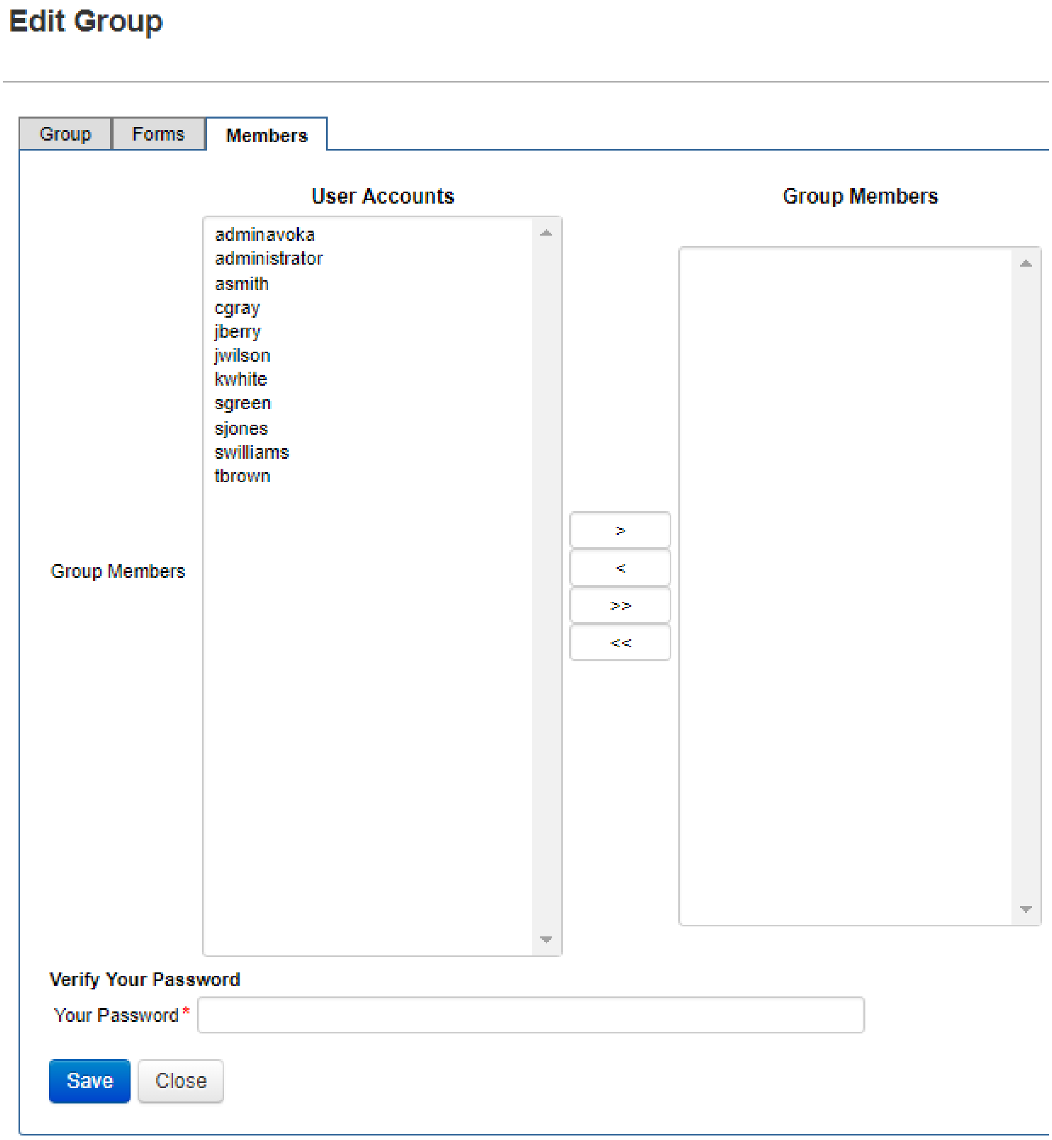
Unknown macro: 'redirect'

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.



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 (Manager v17.10)

Unknown macro: 'redirect'

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.

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)

Pre-Defined Alert Groups (Manager v17.10)

Unknown macro: 'redirect'

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.

Change a User's Group Membership (Manager v17.10)

Unknown macro: 'redirect'

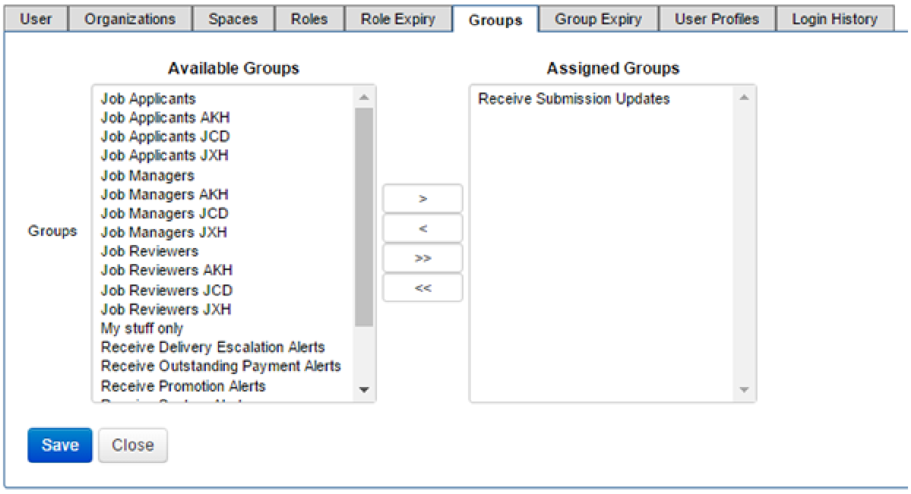
Related Pages:

- 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 v17.10)

Unknown macro: 'redirect'

Related Pages:

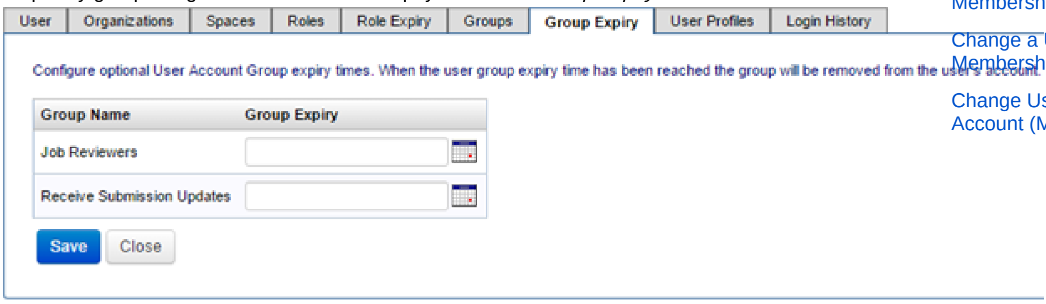
- Assign Permissions to a Role (Manager v17.10)
- Assign Permissions to a Role (Manager v5.1)
- Assign Roles to User Account (Manager v17.10)
- Assign Roles to User Account (Manager v5.1)
- Bulk Import of User Accounts (Manager v17.10)
- Change a User Account (Manager v17.10)
- Change a User Account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

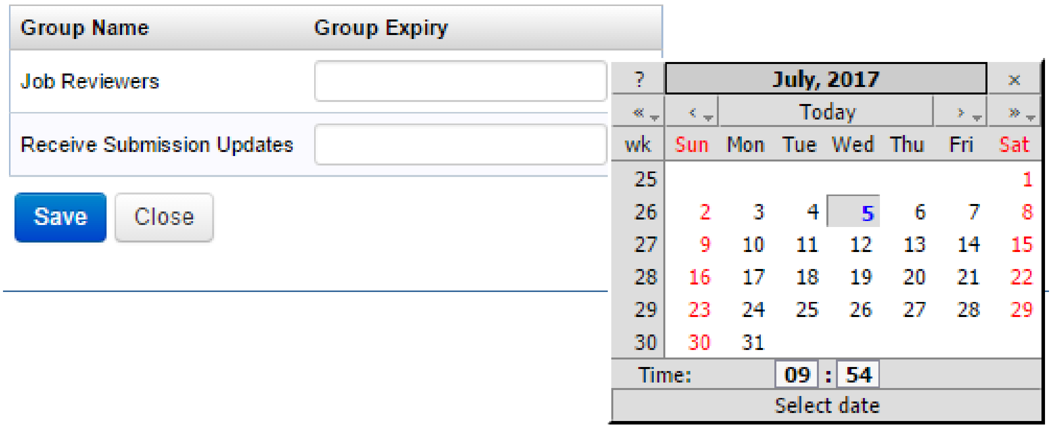
At times, it may be better to temporarily assign a group to a user, such as when allowing Avoka support to assist in debugging a problem that requires the user to be a member of group. Within Transact Manager, it is possible to enforce an expiry time to a user's group.

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

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 *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.



4. 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.



5. 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.

6. 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 v17.10)

Unknown macro: 'redirect'

User Profiles

A user profile in Transact Manager is a set of contact details for a user account. These contact details are predominately used for identification purposes and prefilling forms. User contact details may be maintained by an administrator from within Transact Manager or by a user with an account 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 first created, will automatically create a default user profile, named *My Profile.* This profile contains a copy of the following contact details of the user.

- *Given Name*
- *Family Name*
- *Email*
- *Mobile* (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)

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)

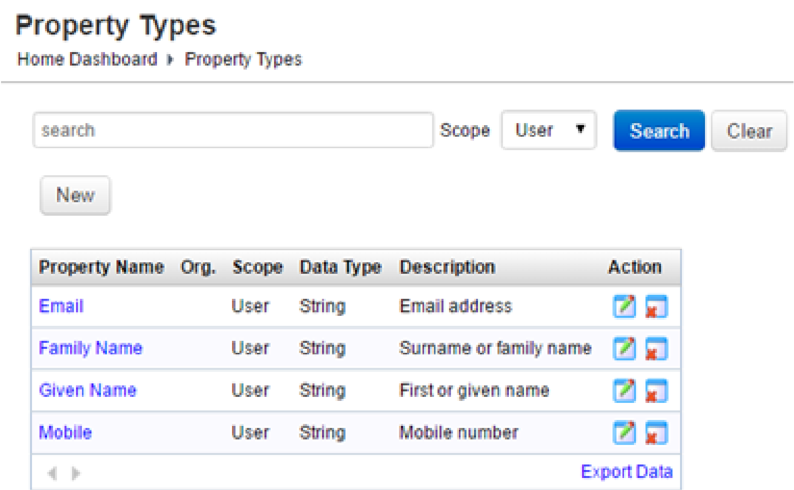
User Property Types (Manager v17.10)

Unknown macro: 'redirect'

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.



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	

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 v17.10)* 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.

Related Pages:

Error rendering macro 'contentbylabel'

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

Change User Profile for a User Account (Manager v17.10)

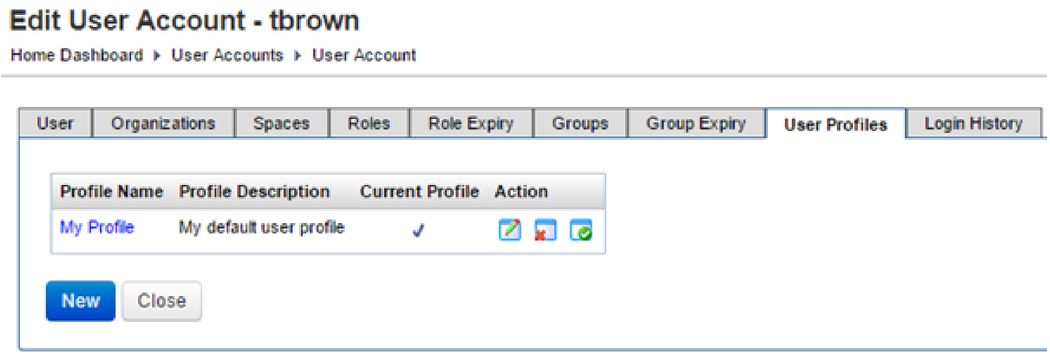
Unknown macro: 'redirect'

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 *Profile Name* 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)



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)

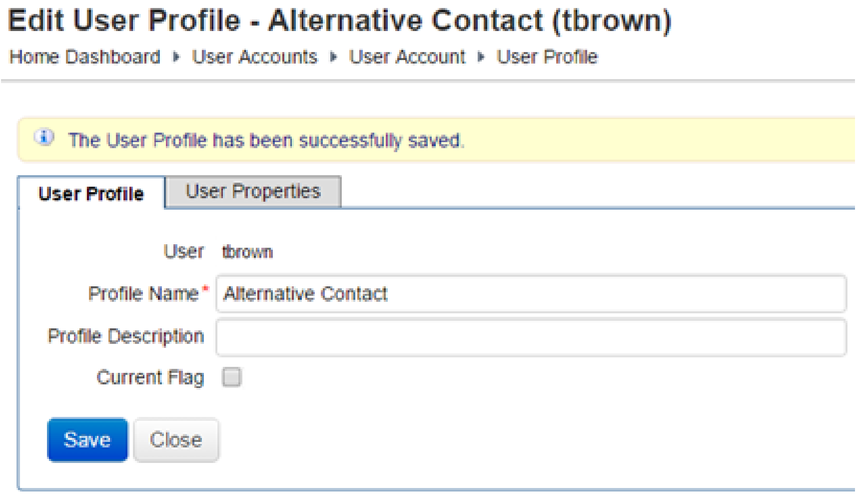
Create a New User Profile for a User Account (Manager v17.10)

Unknown macro: 'redirect'

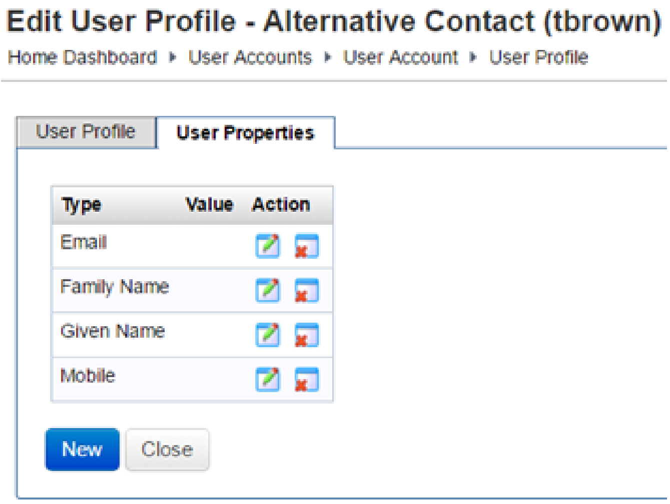
Create a New User Profile for a User Account

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.



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.

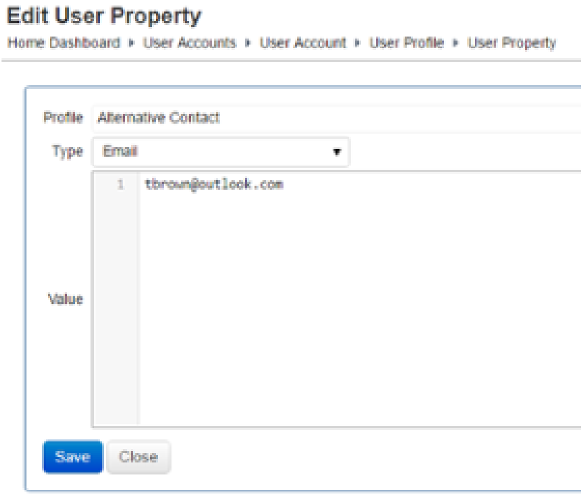


4. To set values for each of the user properties:
   a. Click on the *Edit* ( ) icon and the *Edit User Property* page for the chosen user property will be displayed.
   b. As the example shown in the screenshot below, enter an appropriate value for the user property in the *Value* field.

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)

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



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* section.

Login History (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

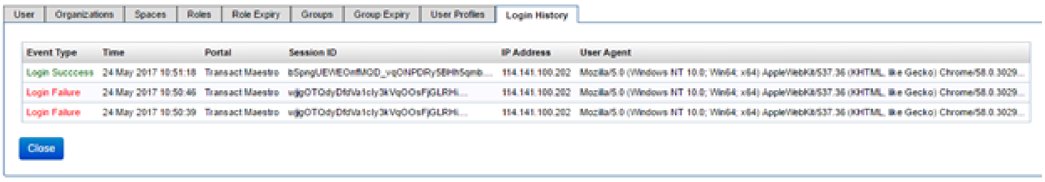
- Assign Permissions to a Role (Manager v17.10)
- Assign Permissions to a Role (Manager v5.1)
- Assign Roles to User Account (Manager v17.10)
- Assign Roles to User Account (Manager v5.1)
- Bulk Import of User Accounts (Manager v17.10)
- Change a User Account (Manager v17.10)
- Change a User Account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

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.



Permissions and Standard Roles (Manager v17.10)

Unknown macro: 'redirect'

Permissions and Standard Roles

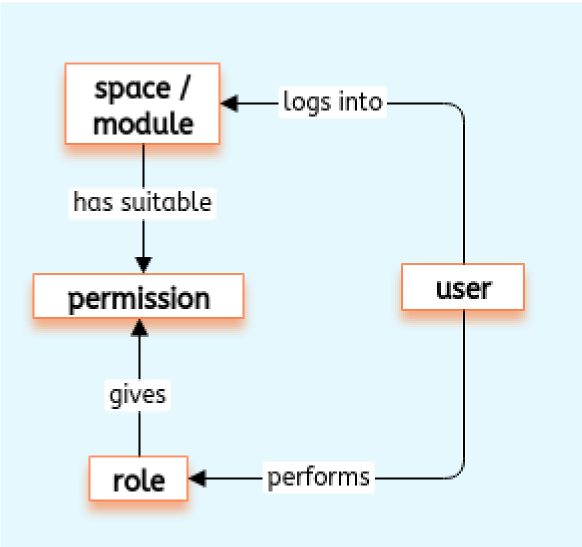
Overview

Roles and permissions exist so that users logging into spaces/modules are granted specific access that matches only the functions they are permitted perform within each space/module. Transact Manager checks what privileges a user has when logged into a space/module. The roles granted to the user will determine these privileges and will continue to control what he/she can see and do within that space/module.

Before either adding extra roles or granting roles to your users, it is important to understand the following concepts:

- A user, via his/her user account, can be granted one or more roles.
- A role sanctions a group of permissions related to a function that is to be performed within a space/module. That is, a role is a group of permissions that is relevant only to the intended space/module.
- Each space/module will have a list of valid permissions available to assign to a role. That is, the role may only grant the types of access relevant to that space/module.
- Each role is mostly for one space/module, but can be for more than one.
- Each permission is normally for one space/module, but can be for more than one.

The diagram below depicts the conceptual data model for users logging into spaces/modules and their required roles and permissions.



Standard Roles

Out of the box, TM provides a standard set of roles. Each role is already configured with its permissions for the standard spaces/modules. It is possible to alter these standard roles as well as add new roles. However, it is recommended to preserve the standard set and, only when essential, add new roles. It is also important to understand what privileges each of the roles will be granting before assigning them to your users.

Transact Manager Roles

A summary of the out of the box roles in TM are as follows:

Role Name	Purpose
Administrator	This is the most privileged role. There should be minimal need to use this role once the system has been installed, **especially not in Production.** The exception would be for the duration needed to perform a deployment where organisational or user roles need to be altered / imported. Regular form upgrades can be done with the *System Manager* role.
System Manager	For users who are almost as privileged as an administrator, except they cannot view submission data or create users and roles This role should only be used where extensive system access is required.
Developer	For users who will develop and manage applications. This role is identical to the *System Manager* role, but has been retained for historical reasons. The *Developer* role should not be used on Production. System configuration and installation in Production, can be achieved using the *System Manager* role.
Organisation User Manager	For users who can create and manage user accounts for their organizations.

Transaction Data Access	For users to be able to view the form submission XML and Receipt data. This is sensitive personal data that needs to be protected.
System Support	For users to be able to do basic troubleshooting and triage of issues. This is the least privileged role in Transact Manager.
Operations	For users who will perform operations monitoring and management of submission transactions and collaboration jobs. This role also has limited access to customer submission data, such as receipts.
REST Delivery	For users who will perform submission delivery by invoking REST delivery service.

Suggested Access Roles for Transact Manager

The roles required in Transact Manager will depend on the functions that each team member is required to perform. The following table is an example of how your teams might need to be set up with specific roles:

Teams	Development	UAT	Staging	Production
Implementation				
Form Developer	System Manager Transaction Data Access	System Manager Transaction Data Access	No Access	No Access
TM Developer Tech Lead	Administrator	Administrator	Administrator Transaction Data Access	No Access
Transact Tester	Operations	Operations	Operations	Operations
Operations				
System Administrator	Administrator	Administrator	Administrator	System Manager Organization User Manager
End User Support Operations	Operations System Manager	Operations System Manager	Operations System Manager	Operations System Manager
Avoka Teams				
Support Engineers Tech Lead	Administrator	Administrator	System Manager	System Operator
Development Teams	Developer	Developer	No Access	No Access

Transact Manager Permissions

When logged into the Transact Manager console the permissions that govern your access follow some general rules. Mostly, permissions ending in:

- *View* give read-only access.
- *Edit* allow modification.
- *Remove* allow deletion.

By granting *Edit* or *Remove* access, it does not automatically entitle *View* access. For each of *Edit* and *Remove* you will also need to include *View* access to the role.
For instance, for a role that allows users to create new and modify existing organizations from the Transact Manager console, it will need these two permissions:

- *Organization View*
- *Organization Edit*

Permissions by Module and Space

The following spreadsheet lists the permissions related to each space/module. That is, one sheet for each space/module:

- *Permissions for TM*
- *Permissions for Maestro*
- *Permissions for Insights*
- *Permissions for Form Spaces.*

Click here and download the spreadsheet, Permissions by Module and Space.xlsx

Form Spaces (Manager v17.10)

Unknown macro: 'redirect'

This section of the documentation introduces the concept of Form Spaces and details the process involved in configuring them in Transact Manager.

- Associate Forms with a Space (Manager v17.10)
- Associate Organizations with a Space (Manager v17.10)
- Configure Pages for a Space (Manager v17.10)
- Configure Space Properties (Manager v17.10)
- Configure Space Resources (Manager v17.10)
- Delete a Space (Manager v17.10)
- Edit a Form Space (Manager v17.10)
- Edit the Status of a Space (Manager v17.10)
- Hot Deploying a Space (Manager v17.10)
- Standard Space Properties (Manager v17.10)

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)

Overview

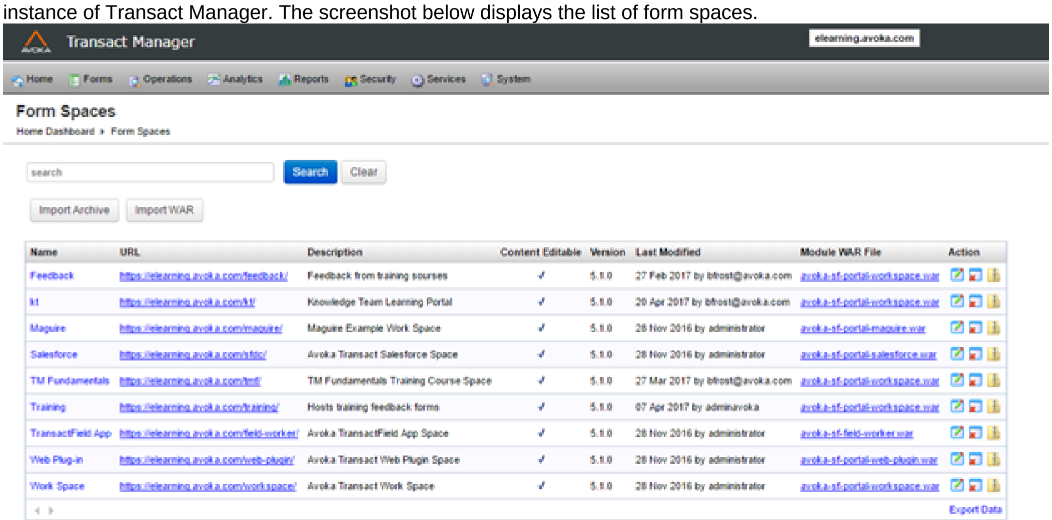
Form Spaces are a key part of Transact Manager and are used to host and expose forms to end users. Form spaces handle form requests, submissions and related form activities. While Transact Manager comes with a recommended form space (named Work Space) and an example self-service form space (named Maguire), 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 an 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.

Edit a Form Space (Manager v17.10)

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)

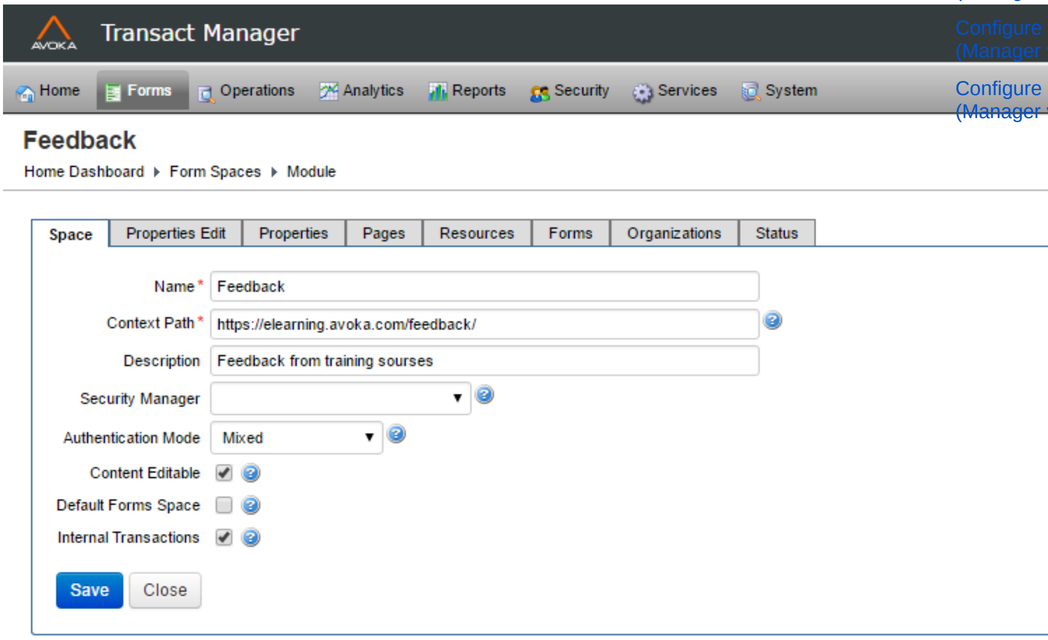
Edit a Form Space

Transact Manager provides Administrators with the ability to edit an already configured form space. The list below identifies several ways that you can 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.



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 v17.10)

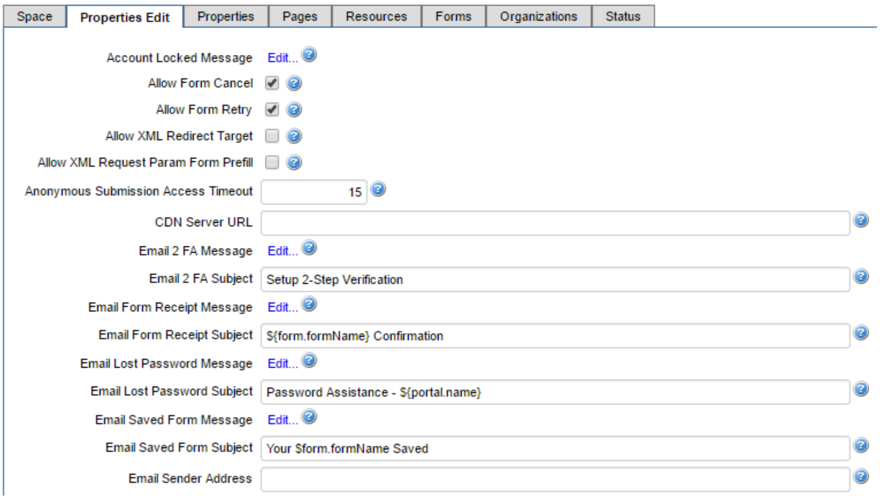
Unknown macro: 'redirect'

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
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
	-	

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
Max Save Challenge Requests	3	The maximum number of save challenge requests that can be performed when returning to a saved form before a user is locked out. This maximum is inclusive of any attempts from other sessions for the same submission.
Save Challenge Lockout Minutes	15	The duration in minutes a submission is locked out when the maximum number of save challenge requests has been exceeded, as per *Max Save Challenge Requests* property. If *Save Challenge Lockout Minutes* is set to 0 then the submission is permanently locked out, requiring a TM administrator to manually unlock this submission.
Search Filter Group Select	true	If set, the *Groups* dropdown is available from the *Tasks* and *History* tabs.
Search Filter Jobs by User Org	true	If set, the *Job Groups* dropdown is available from the *Reviews* tab. Also, the job coordinators can only see jobs that they are responsible for.
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 v17.10)

Unknown macro: 'redirect'

Related Pages:

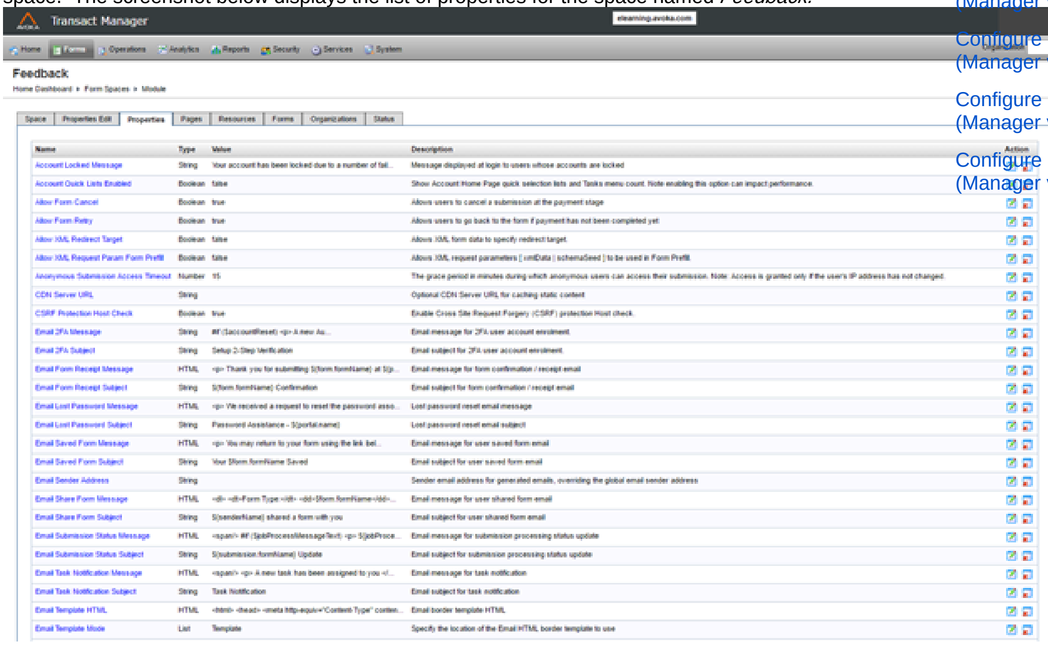
- [Associate Forms with a Space (Manager v17.10)]
- [Associate Forms with a Space (Manager v5.1)]
- [Associate Organizations with a Space (Manager v17.10)]
- [Associate Organizations with a Space (Manager v5.1)]
- [Configure Pages for a Space (Manager v17.10)]
- [Configure Pages for a Space (Manager 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 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 screenshot below displays the list of properties for the space named *Feedback.*



- 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 screenshot below displays this page.

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 v17.10)

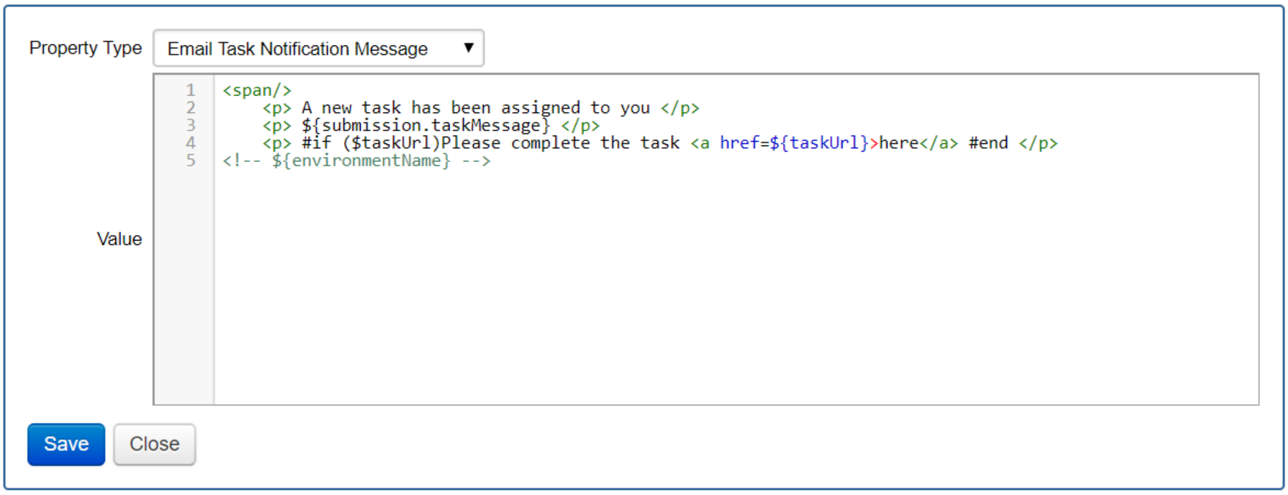
Unknown macro: 'redirect'

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.



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 v17.10)

Unknown macro: 'redirect'

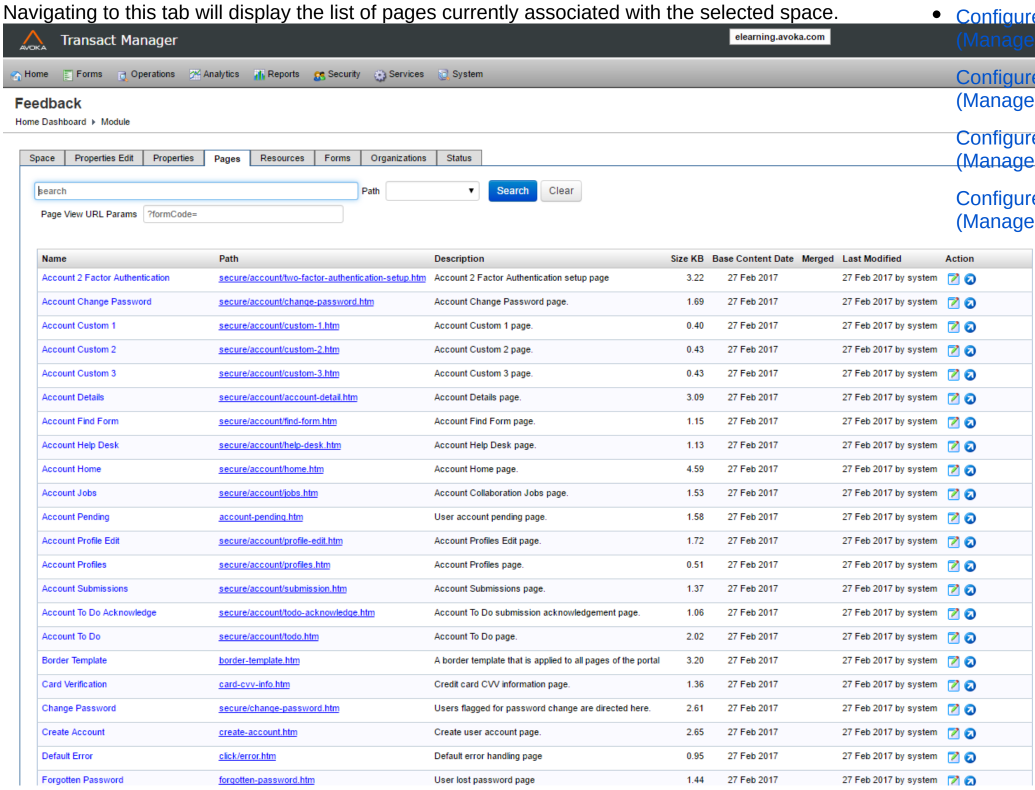
Related Pages:

- 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 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 *Con tent 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.

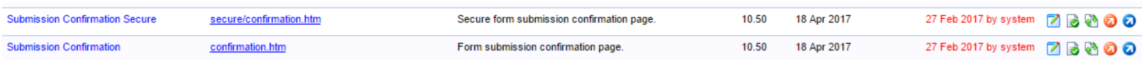


Name	Path	Description	Size KB	Base Content Date	Merged	Last Modified	Action
Account 2 Factor Authentication	secure/account/two-factor-authentication-setup.htm	Account 2 Factor Authentication setup page	3.22	27 Feb 2017		27 Feb 2017 by system	
Account Change Password	secure/account/change-password.htm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

> 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

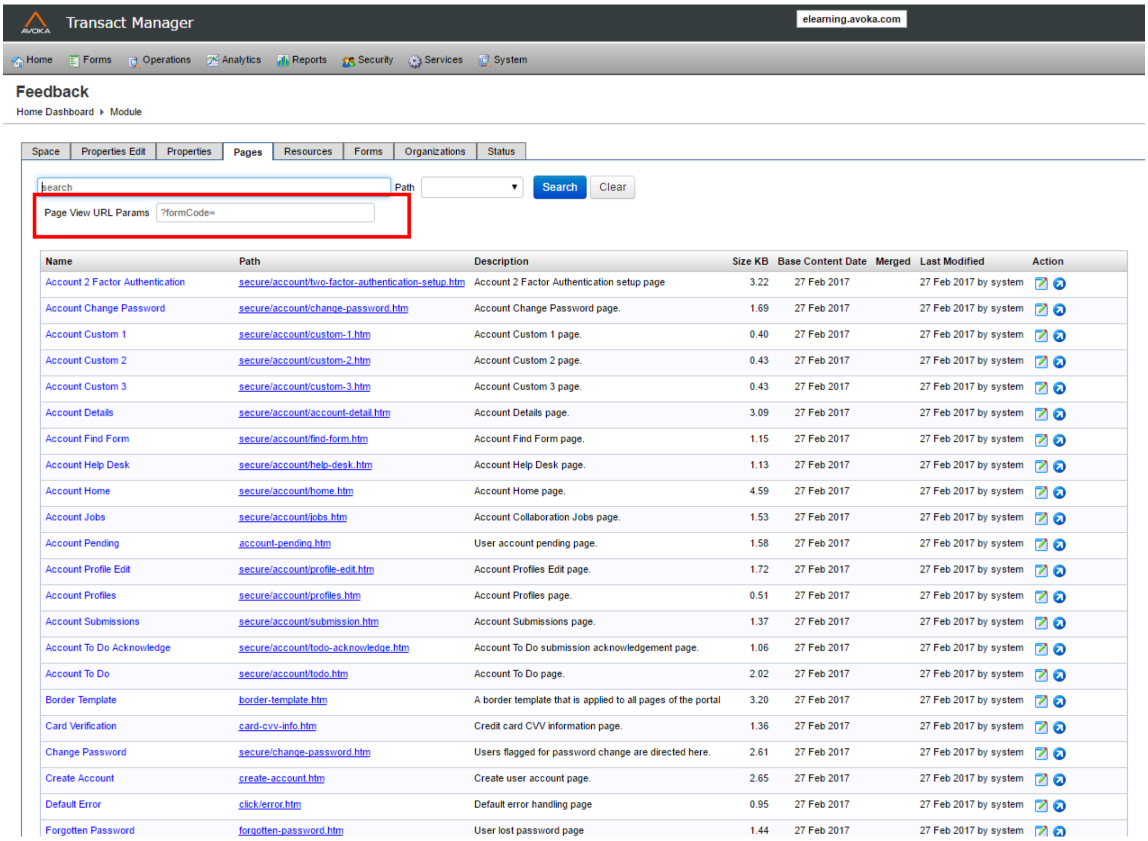
The *Last Modified* column tells you if a page has been recently edited/modified. If the page has been modified, the last modified date and the name of the user who modified the page will be displayed. If the page's content is different (ie the page has been modified/edited) to its base content (the 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	secure/confirmation.htm	Secure form submission confirmation page.	10.50	18 Apr 2017	27 Feb 2017 by system
Submission Confirmation	confirmation.htm	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 action icons. Many users will only be presented with the edit and view icons.



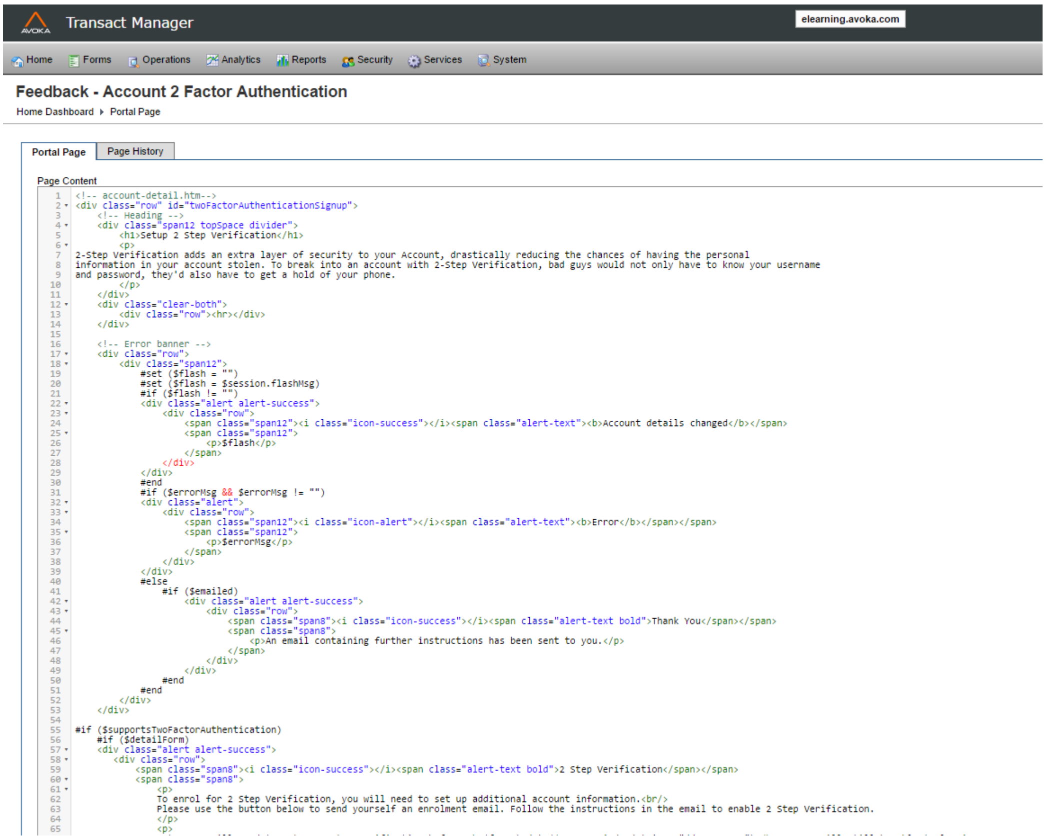
Name	Path	Description	Size KB	Base Content Date	Merged	Last Modified	Action
Account 2 Factor Authentication	secure/account/two-factor-authentication-setup.htm	Account 2 Factor Authentication setup page	3.22	27 Feb 2017		27 Feb 2017 by system	
Account Change Password	secure/account/change-password.htm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

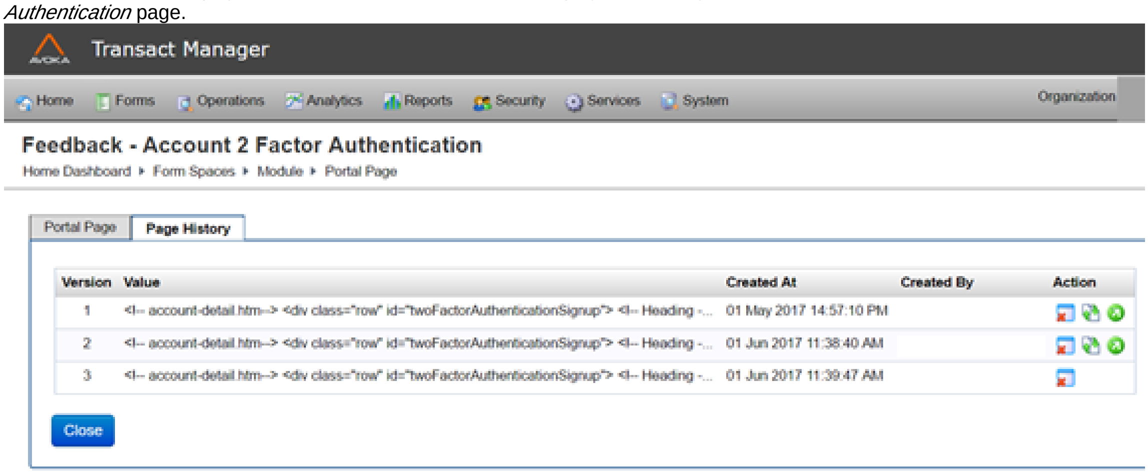


5. Make the edits to the page
6. Click the *Save* button

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.



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

Configure Space Resources (Manager v17.10)

Unknown macro: 'redirect'

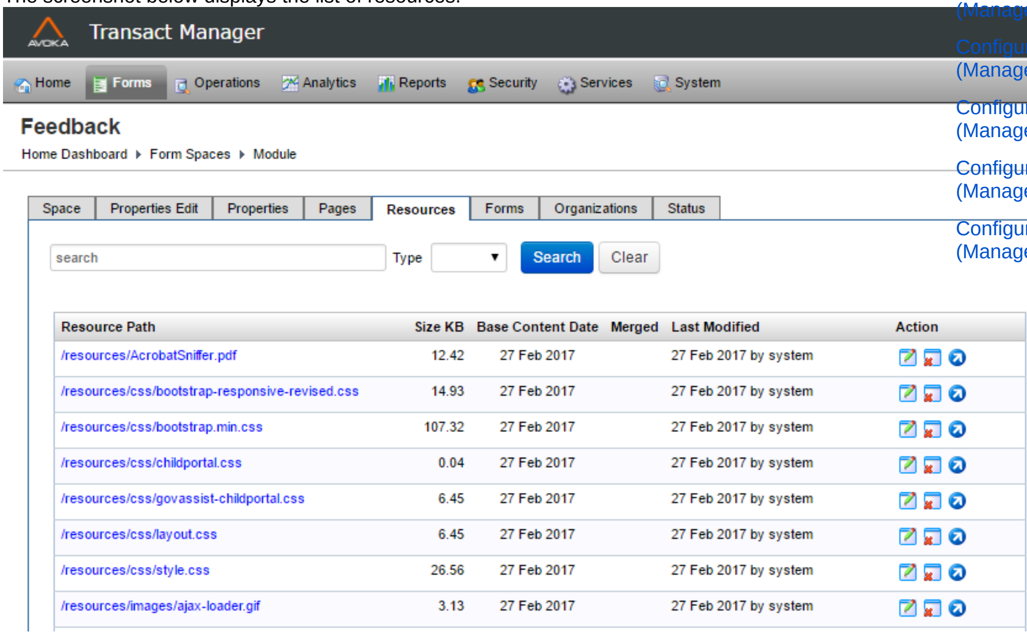
Related Pages:

- 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.



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.

- 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.

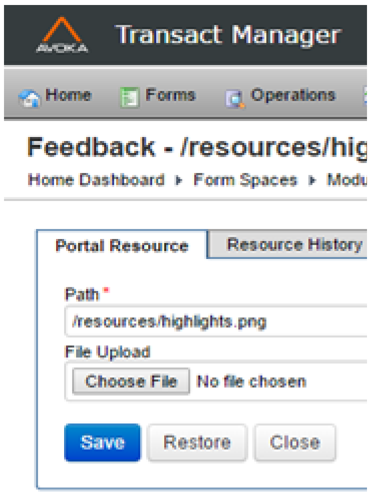
1. Selec*t Forms > Form Spaces from the menu bar.*
2. Select the space that you want to create a resource for and click the *Edit Space icon* (ensure that the space is editable).
3. Switch to the *Resources* tab.
   Switching to this tab will display the list of resources currently configured for the 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.*

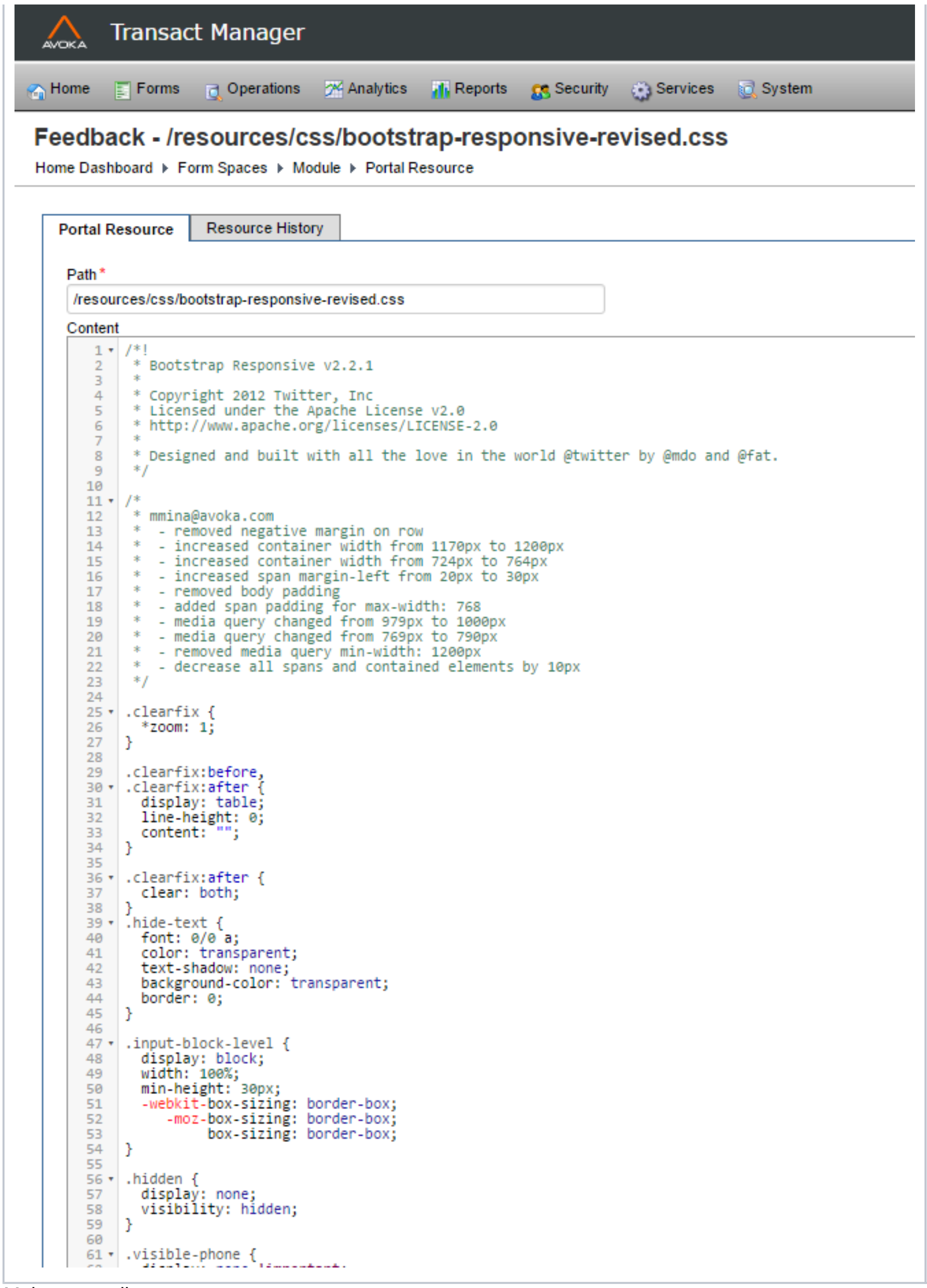
5. Enter a path for the resource into the *Path* field.
   The *Path* is where the resource should be hosted (relative to the space context path). An example *Path* is resources/CSS/learning.css or resources/highlights.png
6. Enter content for the path.
   For a CSS resource or any other textual resources (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 (ensur e 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.

<table>
<tr><th>CSS Resource</th><th>Image Resource</th></tr>
<tr><td></td><td>
</td></tr>
</table>



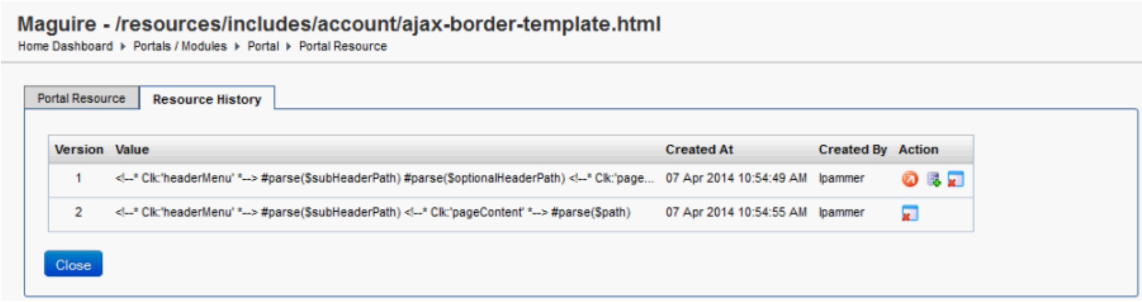
5. Make your edits.
   For a CSS file, you can make your edits directly into the Content area. For an image resource, you can upload a new (updated) PNG or jpeg file.
6. Click Save
   Any updates that you make will only be applied once you click the *Save* button.

> 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.



- 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 v17.10)

Unknown macro: 'redirect'

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.

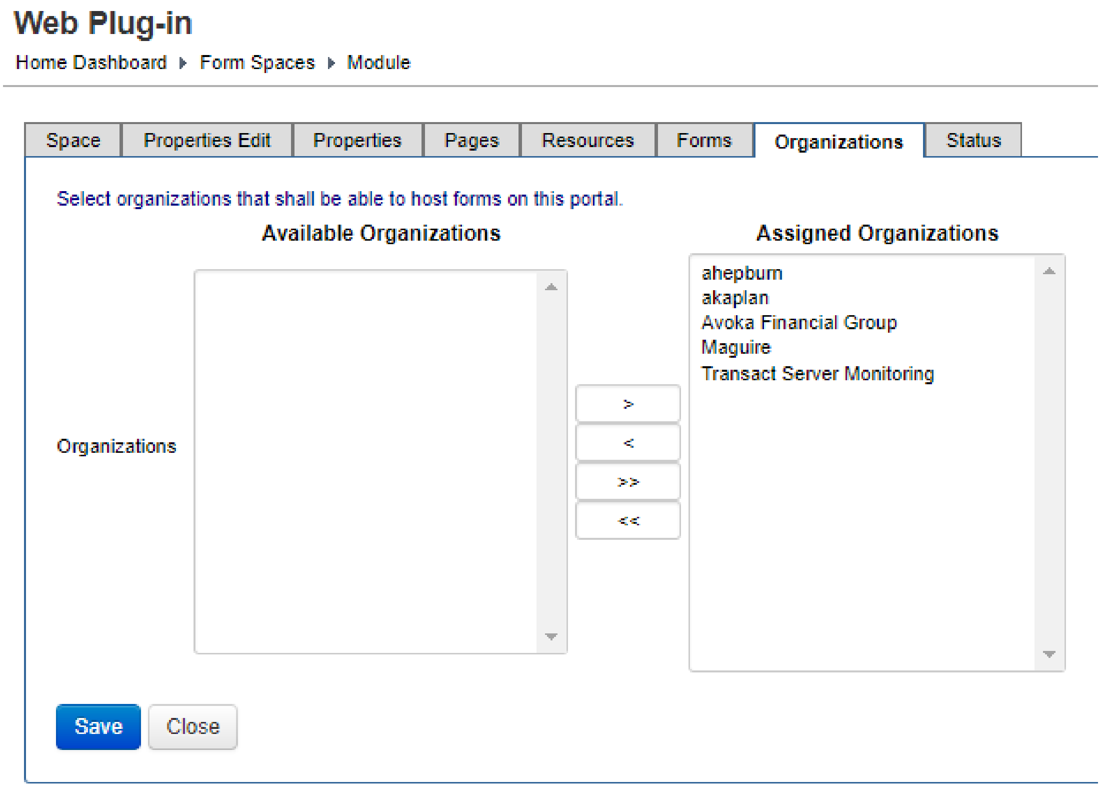
> The Web Plug-In space is the default space used when building TM form versions from Maestro. The Web Plug-In space is **required** for all users and organizations working with Maestro forms. if the Web Plug-In space is not assigned, you will receive an error message when building the TM form version. Please see Web Plug-In Space (Manager v17.10) for more information.
>
> **This may require changes to your currently configured system when using Maestro 5.1 (or later).**

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 screenshot below displays the *Organization Selection* screen.



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.

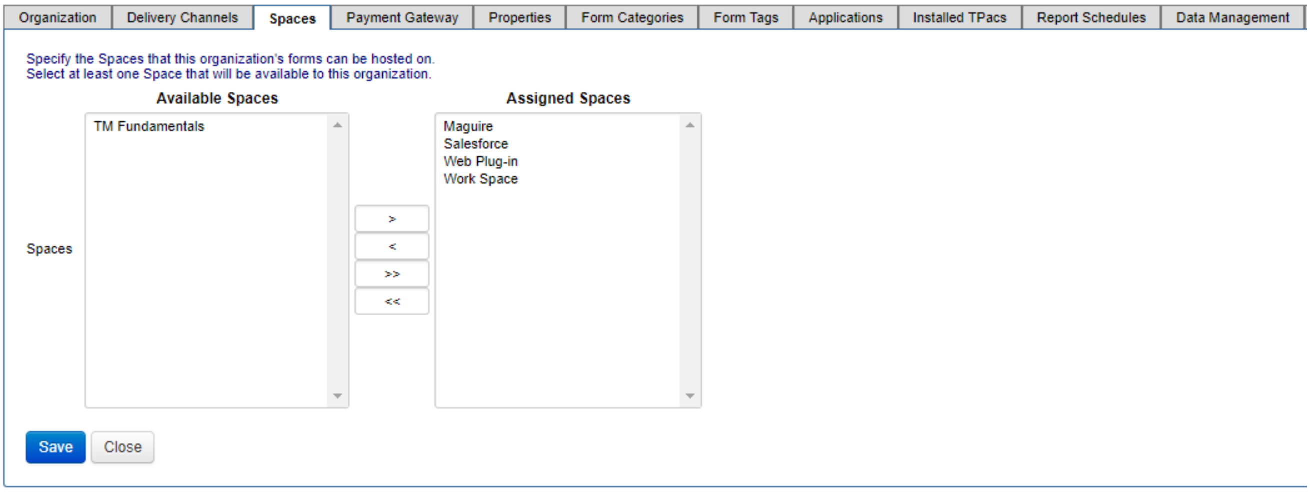
Selecting the ">>" icon will move all Organizations from the *Available Organizations* list, to the *Assigned Organizations* list.

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 screenshot below displays the *Space Selection* screen.



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.

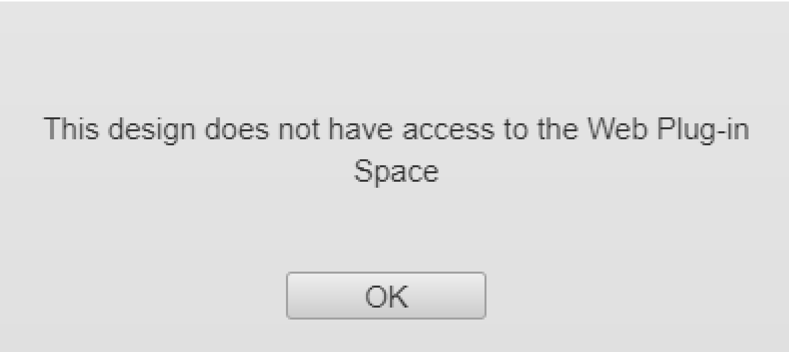
Web Plug-In Space (Manager v17.10)

Unknown macro: 'redirect'

Web Plug-In

The Web Plug-In space is the only form space that is readily available on *all* 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 v17.10) 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 v17.10) 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.

Related Pages:

Error rendering macro 'contentbylabel'

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

Associate Forms with a Space (Manager v17.10)

Unknown macro: 'redirect'

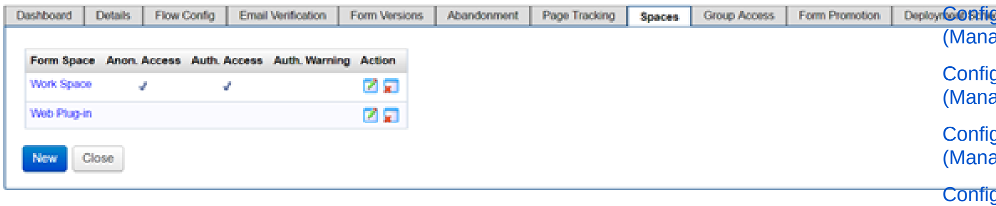
Related Pages:

- 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)

Associate Forms with a Space

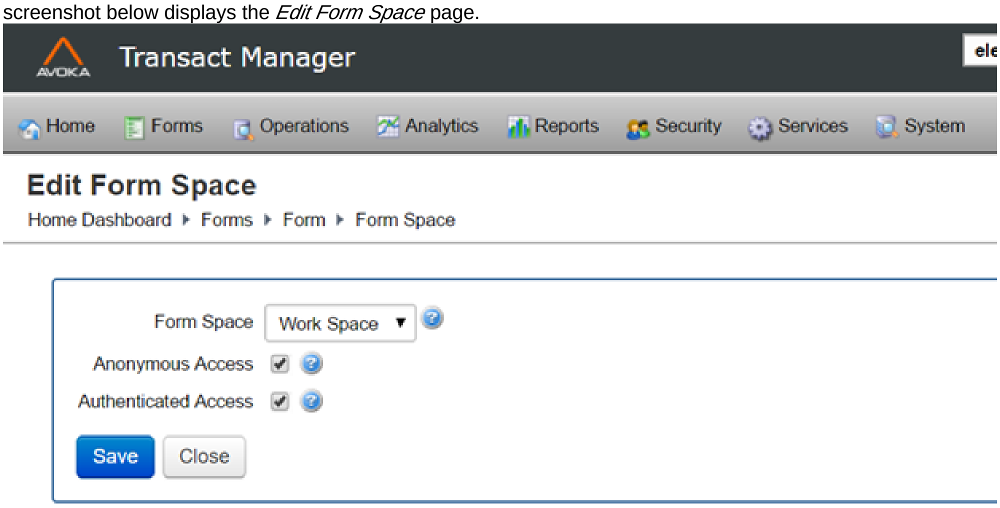
The steps below document the process of associating a form with a form space. The spaces available to a form are determined by the spaces associated with the form's organization.

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.



   "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.



5. Use the *Form Space* dropdown menu to select the Form Space that you want to associate with the selected form (eg Work Space).
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 identifying an issue with the access to the form will be added to the list of forms that are configured for the selected space.

Auth. Warning
⚠
⚠
⚠
⚠
⚠

Edit the Status of a Space (Manager v17.10)

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)

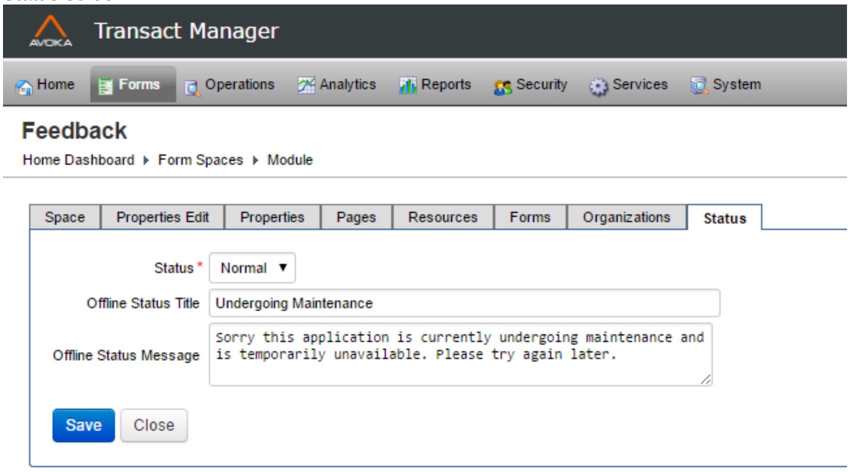
Edit the Status of a Space

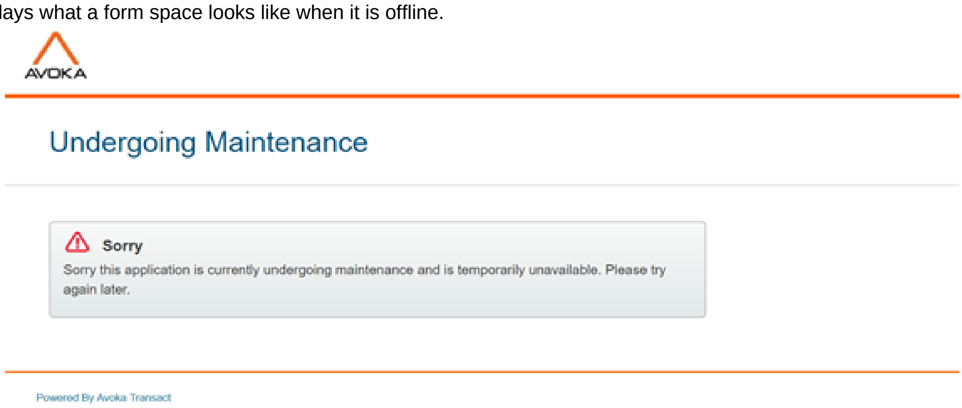
Transact Manager allows you to restrict access to a form space by changing the status of the space. Currently, a form space in Transact Manager can be one of the following two statuses.

- 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,* us ers 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

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 v17.10)

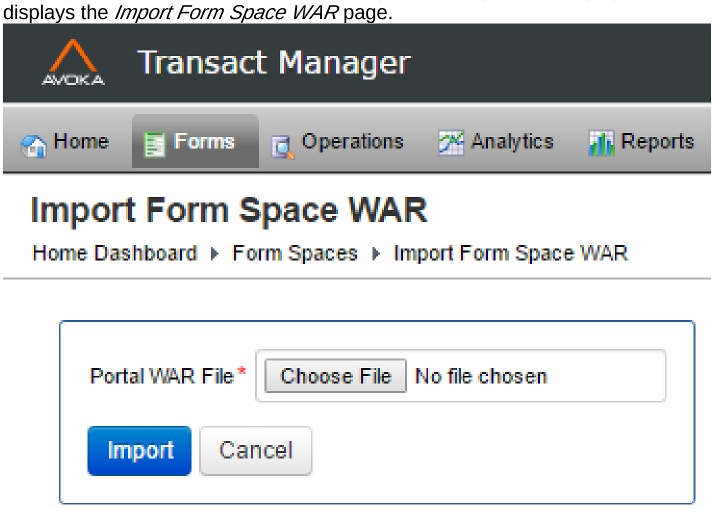
Unknown macro: 'redirect'

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.

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.

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)

Delete a Space (Manager v17.10)

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 menu.
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 v17.10)

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 covered in this section of the documentation.

Event Log (Manager v17.10)

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 event 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.*

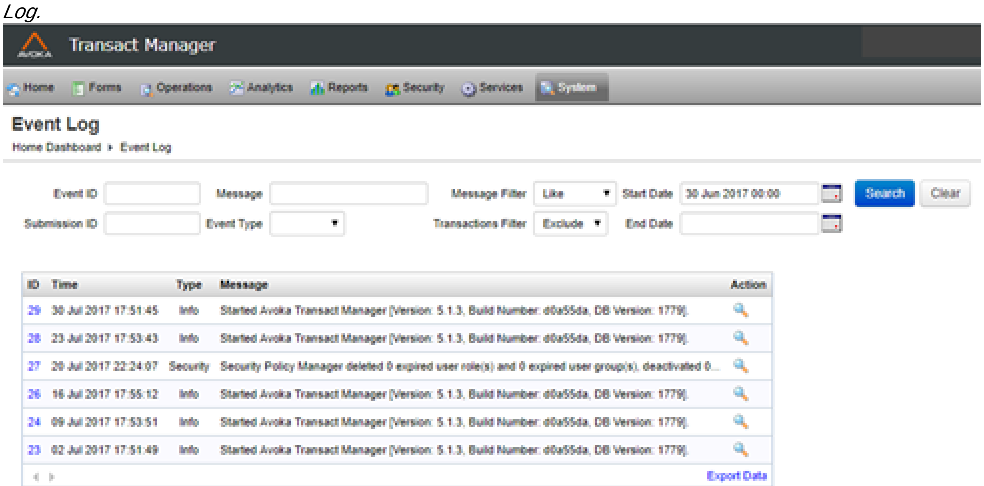
- *Info* – An info event is an event describing information concerning the TM management console.
- *Warning* – A warning event identifies when a warning is prompted to a user.
- *Error* – An error event identifies when TM has encountered an error.
- *Security* – A security event identifies an error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



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 v17.10)

Unknown macro: 'redirect'

Error Log

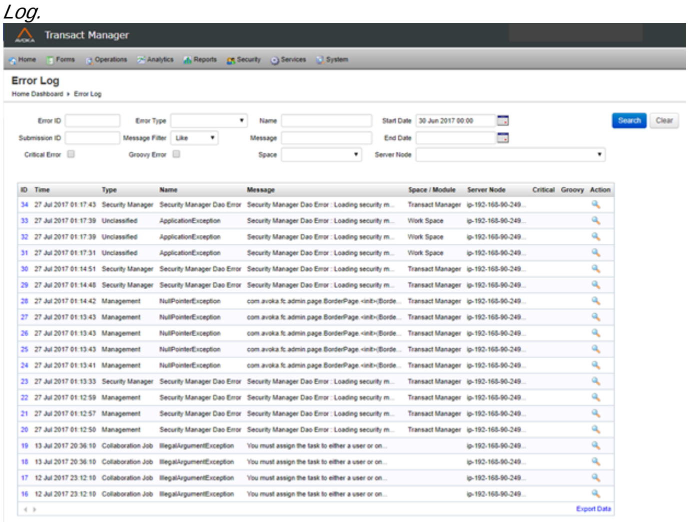
The *Error Log* is a log that displays any errors that occurred across all Transact spaces and modules for the TM environment. Common examples of *Error Log* entries include error messages resulting from lost database connections, error messages describing faulty form data configurations, and error messages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



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 v17.10)

Unknown macro: 'redirect'

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

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

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)

Build Properties

Name	Value
cookie.secure	true
data.retention.policy	strict
database.product	mysql
database.schema	knowledgeteam_tm
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
livecycle.version	none
revision.number	d0a55da
system.license.key	qj4mwKOaRGc8oxaJtJaOJ/DNgAYoLGB0zpEuoWhXlwatQFJBoP6Z6rfADKrcweK39hXEc2VBS83tTmOcZgFLig==

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 v17.10)

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)

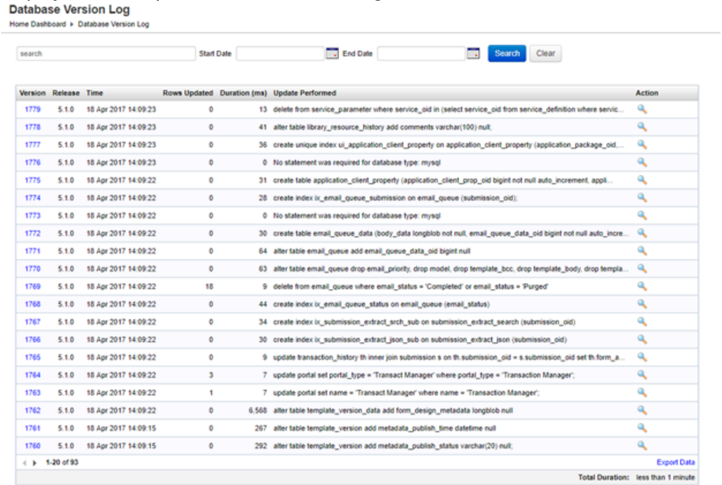
Database Version Log

When Transact Manager is loaded, 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 Transact Manager 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 ui_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 = 'Purged'	
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_srch_sub on submission_extract_search (submission_oid)	
1766	5.1.0	18 Apr 2017 14:09:22	0	30	create index ix_submission_extract_json_sub on submission_extract_json (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;	

1-20 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 following methods.

- Enter in the search box:
  - The number to search release number in the *Release* column, and/or
  - 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.

Configure Virus Scanning for Attachments (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

Configure Virus Scanning for Attachments

To avoid users attaching malicious or infected files to their applications, 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

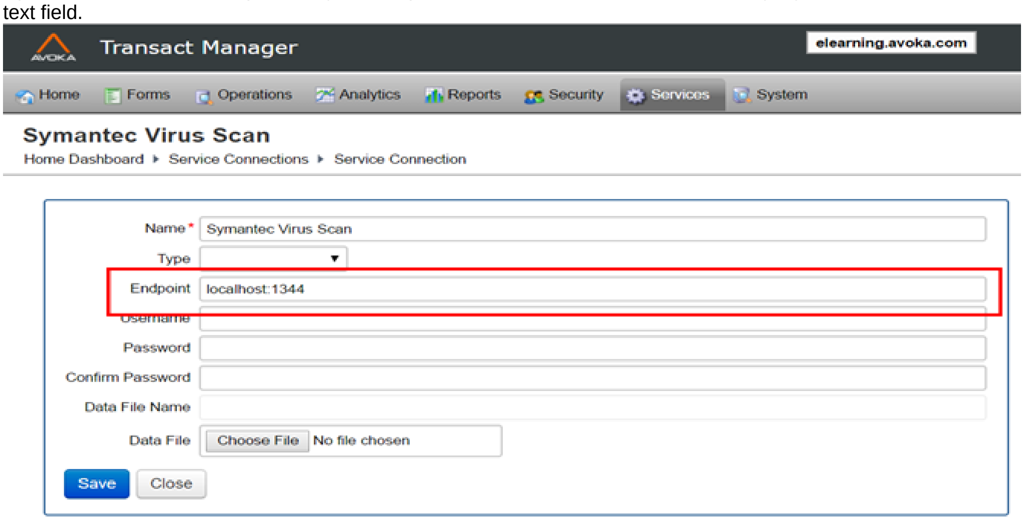
Setting Up the Symantec Virus Scanning Service

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.



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.

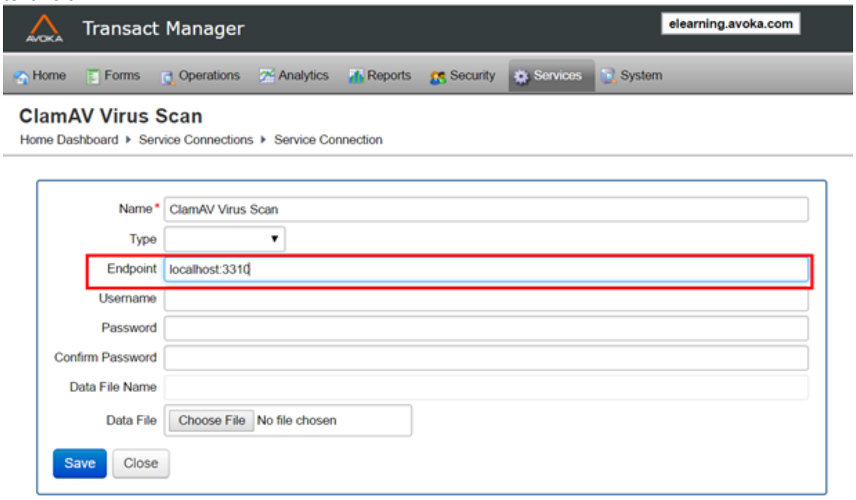
If your set up of ClamAV is running on a different server or port other than the default (localhost 3310), then you will have to edit the service connection.

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)

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.



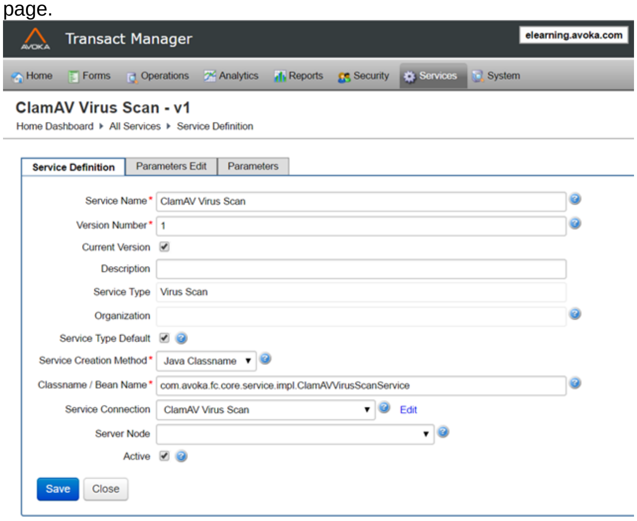
5. Click the *Save* button.

Activating a Virus Scanning Service

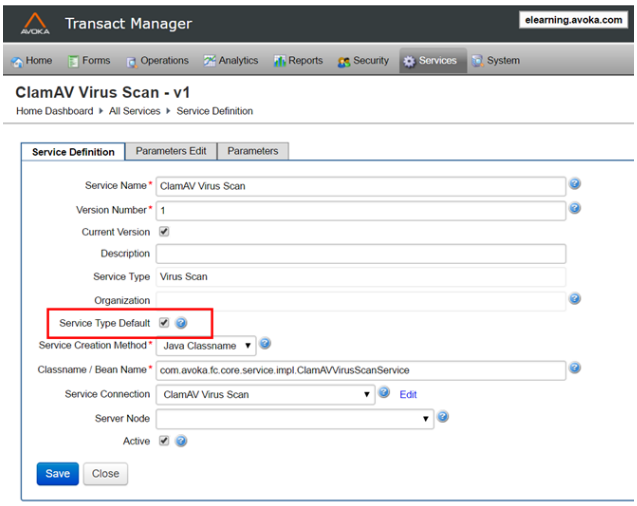
Once at least one virus scanning service has been set up, it is time to activate it for use in Transact Manager. Services are activated in Transact Manager by identifying one as the *Service Type Default.*

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.



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.



5. Click the *Save* button.

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

Core Global Services (Manager v17.10)

Unknown macro: 'redirect'

Overview

Transact Manager out of the box comes with a standard set of services, each service:

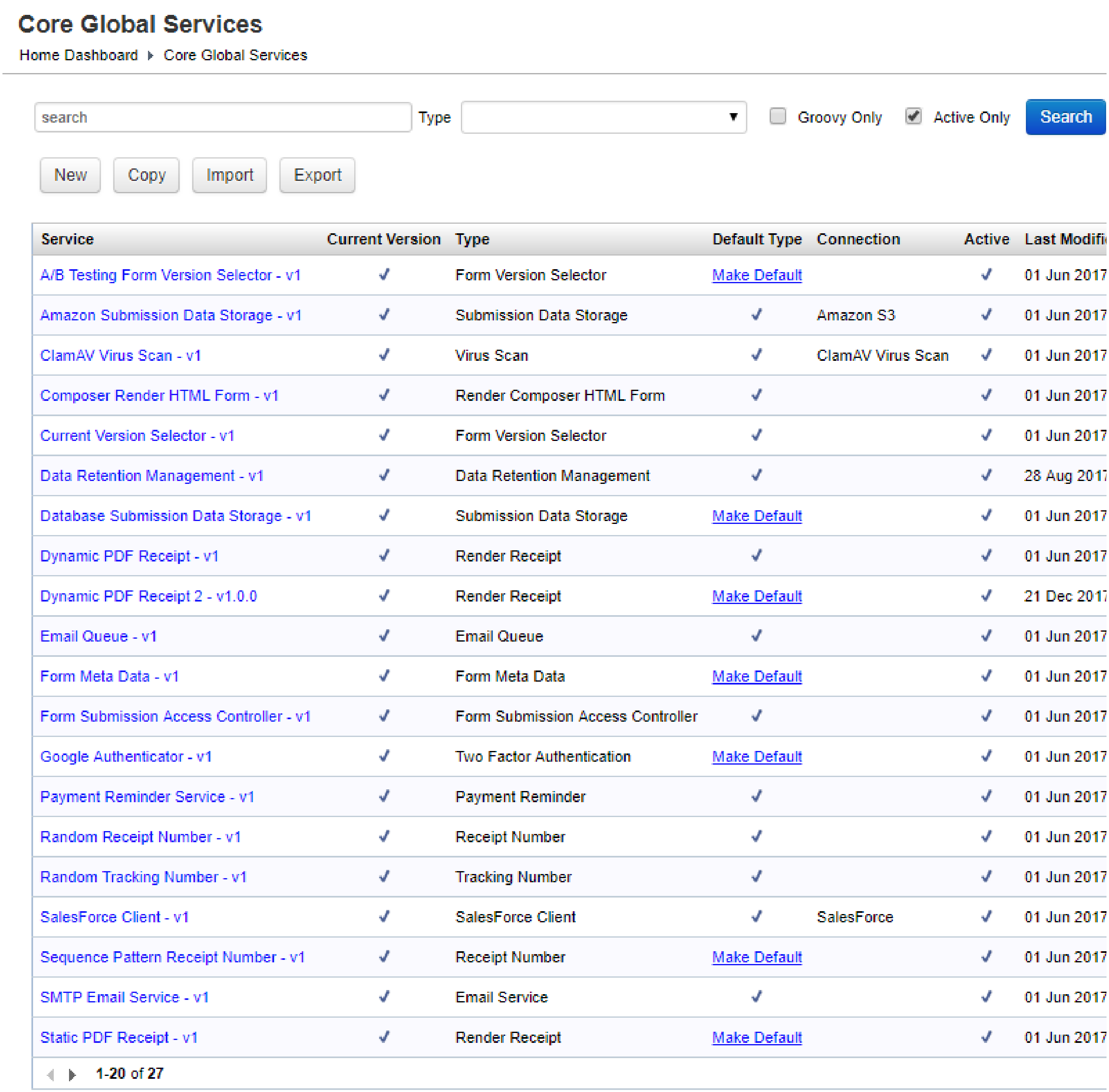
- Performing a specific function throughout your Transact environment.
- Is of a particular service type.
- Can be customized to suit your requirements.

Core Global Services Page

To view the *Core Global Services* in your TM instance:

1. Navigate to *Services* from the menu bar, and then click *Core Global Services* from the dropdown menu.

The following is an example screenshot of the *Core Global Services* page.



Service	Current Version	Type	Default Type	Connection	Active	Last Modifi
A/B Testing Form Version Selector - v1	✓	Form Version Selector	Make Default		✓	01 Jun 2017
Amazon Submission Data Storage - v1	✓	Submission Data Storage	✓	Amazon S3	✓	01 Jun 2017
ClamAV Virus Scan - v1	✓	Virus Scan	✓	ClamAV Virus Scan	✓	01 Jun 2017
Composer Render HTML Form - v1	✓	Render Composer HTML Form	✓		✓	01 Jun 2017
Current Version Selector - v1	✓	Form Version Selector	✓		✓	01 Jun 2017
Data Retention Management - v1	✓	Data Retention Management	✓		✓	28 Aug 201
Database Submission Data Storage - v1	✓	Submission Data Storage	Make Default		✓	01 Jun 2017
Dynamic PDF Receipt - v1	✓	Render Receipt	✓		✓	01 Jun 2017
Dynamic PDF Receipt 2 - v1.0.0	✓	Render Receipt	Make Default		✓	21 Dec 201
Email Queue - v1	✓	Email Queue	✓		✓	01 Jun 2017
Form Meta Data - v1	✓	Form Meta Data	Make Default		✓	01 Jun 2017
Form Submission Access Controller - v1	✓	Form Submission Access Controller	✓		✓	01 Jun 2017
Google Authenticator - v1	✓	Two Factor Authentication	Make Default		✓	01 Jun 2017
Payment Reminder Service - v1	✓	Payment Reminder	✓		✓	01 Jun 2017
Random Receipt Number - v1	✓	Receipt Number	✓		✓	01 Jun 2017
Random Tracking Number - v1	✓	Tracking Number	✓		✓	01 Jun 2017
SalesForce Client - v1	✓	SalesForce Client	✓	SalesForce	✓	01 Jun 2017
Sequence Pattern Receipt Number - v1	✓	Receipt Number	Make Default		✓	01 Jun 2017
SMTP Email Service - v1	✓	Email Service	✓		✓	01 Jun 2017
Static PDF Receipt - v1	✓	Render Receipt	Make Default		✓	01 Jun 2017

For each service, details are displayed under the following columns:

Service represents the name of this service.

Current Version represents whether this service is a current version (as ticked and blank if not)

Type represents this service is of one of the following types. Each service type:

- Acts as a template by providing the applicable set of parameters for each service type.
- Determines how it will be used within the TM instance.
- When a service is ticked as the default service, it means that it is the service that will be defaulted within its service type.

The list of service types in TM are:

- Data Retention Management
- Email Queue
- Email Service
- Find Delivery Process ID
- Form Meta Data
- Form PDF Pre Render
- Form Server Load Balancer
- Form Submission Access Controller
- Form Version Selector
- Groovy Service
- Payment Reminder
- Receipt Number
- Render Composer HTML Form
- Render Form
- Render Offline Submission Form
- Render Receipt
- Repository Publish
- Repository Synchronize
- SalesForce Client
- Submission Data Extraction
- Submission Data Storage
- Submission Delivery Controller
- Submission Email Verification
- Submission Receipt
- Submission Service
- Task Expiry Service
- Tracking Number
- Transaction Processor
- Two Factor Authentication
- Virus Scan

Default Type represents whether this service is the default service for the type of service. For instance, from the above list the *Dynamic PDF Receipt – v1* service is the default *Receipt Render* service type.

Connection (where applicable) represents the service connection configuration details associated with this service.

Active represents whether this service is active. It must be active to be available. Instead of deleting a service you may wish to deactivate it by deselecting the *Active* checkbox to make it unavailable.

Last Modified represents the date and timestamp of when this service was last modified and by which user account.

Action represents icons for certain actions. From this page, for a specific service, you may perform the following actions:

Icon	Action
	View and/or change (same as clicking on the link in the *Service* column)
	Delete (This is not recommended and before choosing to delete a service please consider either removing it from the current default or deactivating it first - refer to Update the Service Definition)
	Export this service
	Run a unit test (only available for services of type *Groovy Service*, *Scheduled Service* and *Virus Scan*.

When your list of services is long, you may wish to filter the list by one or more of the following options.

- Enter a service name in the search box (can filter on partial name). To activate this filter you must click the *Search* button.
- Select a type from the *Type* dropdown.
- Select the *Groovy Only* checkbox if only interested in Groovy services.
- By default, only active services are listed (*Active Only* checkbox is ticked). If you wish to also see the inactive services listed, deselect the *Active Only* checkbox.

To create a new service, click the *New* button. The process of configuring a new service is covered in the Create a New Service section.

To copy an existing service, click the *Copy* button. The process of copying an existing service is covered in the Copy an Existing Service section.

To export all services, click the *Export* button. The process of exporting all services is covered in the Migrate Services (Manager v17.10)section.

To import all services, click the *Import* button. The process of importing all services is covered in the Migrate Services (Manager v17.10)section.

To export this filtered list of services to an excel spreadsheet, click the *Export Data* link.

Data Retention Management Service (Manager v17.10)

Unknown macro: 'redirect'

The *Data Retention Management* service is executed from the *Transaction Processor* service. The system default is to include data retention indicated by the *Include Data Retention* checkbox being ticked. It is responsible for processing the following important steps in the transaction lifecycle such as performing:

- Task expiry
- Abandonment
- Data purging

The Data Retention Management Service

To view the current settings for the *Data Retention Management* service, select this service from the *Core Global Services* page. The settings may be viewed from the *Parameters Edit* or *Parameters* tab.

The parameters for this service must only be updated from the *Retention Settings* tab of the *Data Retention Management* page. The only exception is the *Log to Event Log* parameter that doesn't have an equivalent setting there.

Must only update the *Log to Event Log* parameter from here.

Parameter	System Default	Explanation
Log To Event Log	true	Log the results of the Data Retention policy application to the Event Log.

Dynamic PDF Receipt Service (Manager v17.10)

Unknown macro: 'redirect'

There are 2 form specific services for generating PDF receipts:

- The *Dynamic PDF Receipt* service (explained here) for the legacy receipt render service.
- The *Dynamic PDF Receipt 2* service for providing more options for customization of the receipts.

Dynamic PDF Receipt service

Parameter	System Default	Explanation
Linux Page Zoom Factor	0.8	The paper zoom factor for Linux servers.
Max Processes	2	The maximum number of concurrent PhantomJS processes. Applying changes will require a server start.
Page Size Format	A4	The paper size format.
Page Size Margin	0.5cm	The paper size margin.
Phantom JS Exe	phantomjs	The PhantomJS executable filename (excluding the Windows .exe file extension).
Process Timeout	6 sec	The PhantomJS rendering process timeout in milliseconds.

Dynamic PDF Receipt 2 Service (Manager v17.10)

Unknown macro: 'redirect'

There are 2 form specific services for generating PDF receipts:

- The *Dynamic PDF Receipt* service for the legacy receipt render service.
- The *Dynamic PDF Receipt 2* service (explained here) for providing more options for customization of the receipts.

Dynamic PDF Receipt 2 service

Parameter	**System Default**	**Explanation**
Fallback Timeout	30000	The fallback process timeout in milliseconds.
Max Processes	2	The maximum number of concurrent PhantomJS processes. Applying changes will require a server start.
Phantom JS Exe	phantomjs	The PhantomJS executable filename (excluding the Windows .exe file extension).
Receipt Properties Json	Default JSON file	The properties that will be passed to receipt.js for PhantomJS rendering. For more information on how to modify this JSON file please refer to *Customize Headers and Footers (Manager v17.10)* section under *Receipts*

Submission Receipt Render Service (Manager v17.10)

Unknown macro: 'redirect'

The *Submission Receipt Render* service is a core global service for handling the generation of PDF receipts in the background. This service can be customized according to your requirements, such as part of load balancing.

The Submission Receipt Render service

To view the current settings for the *Submission Receipt Render* service, select this service from the *Core Global Services* page. The settings may be viewed from the *Parameters Edit* or *Parameters* tab.

The *Submission Receipt Render* service may be customized by updating the following parameters, as and if required.

Parameter	System Default	Explanation
Enable Receipting	True	Enabled background PDF receipt generation.
Max Render Attempts	10	The max number of PDF receipt rendering attempts for an individual submission before stopping and put into receipt error status.
Number Submissions To Process	60	The max PDF receipt generation queue length. This is a balance, if the queue length is too long then during quiet times a single node may take all the receipts waiting for receipts and effectively serialise the process affecting responsiveness.
Number Worker Threads	2	The number of concurrent PDF rendering processes to run. That is the number of worker thread servicing the receipt queue on an individual node. This must not be greater than the *Max Processes* parameter setting on both the *Dynamic PDF Receipt* and the *Dynamic PDF Receipt 2* services.

Transaction Processor Service (Manager v17.10)

Unknown macro: 'redirect'

The *Transaction Processor* service is run as part of the *Transaction Processing* job. It is responsible for processing the following important steps in the transaction lifecycle such as performing:

- Delivery
- Task expiry
- Abandonment
- Data purging

The Transaction Processor Service

To view the current settings for the *Transaction Processor* service, select this service from the Core Global Services page. The settings may be viewed from the *Parameters Edit* or *Parameters* tab.

The *Transaction Processor* service may be customized by updating the following parameters, as and if required. Please proceed with care and we strongly recommend seeking advice from Avoka before updating these parameters.

Parameter	System Default	Explanation
Fetch Limit For Abandonment	1000	The maximum number of records to consider for each abandonment type.
Fetch Limit For Delivery	1000	The maximum number of records to consider for each delivery type (normal vs. abandoned submission delivery).
Fetch Limit For History	2000	The maximum number of records to process for transaction history creation.
Fetch Limit For Purging	500	The maximum number of records to process for Transaction record purging.
Include Abandonment	True	Use this parameter to turn off abandonment if needed. Warning: Turning off transaction processing steps will cause eligible submissions not to progress.
Include Data Retention	True	Use this parameter to turn off Data Retention processing. Including the Data Retention will execute the *Data Retention Management* service *(Core Global Service)*. Warning: Turning off Data Retention Processing will mean that no data purging will occur. This is not recommended and should only update this if necessary on a short-term basis.
Include RESTDelivery Retry	True	Use this parameter to turn off delivery if needed. Warning: Turning off transaction processing steps will cause eligible submissions not to progress.
Include Task Expiry	True	Use this parameter to turn off task expiry if needed. Warning: Turning off transaction processing steps will cause eligible submissions not to progress.
Log To Event Log	False	Log the results of the transaction processing to the Event Log. It is recommended to keep this setting at false unless temporarily required to keep track of transaction processing issues.
System Alert Time Minutes	15	The number of minutes that the system monitoring job will use when determining whether system alerts need to be raised about the transaction processing service.

A B Testing Form Version Selector Service (Manager v17.10)

Unknown macro: 'redirect'

For a form to participate in an A/B testing the *A/B Testing Form Version Selector* service must be linked to this form in TM. However, by default when a user selects this form, the *A/B Testing Form Version Selector* service will choose one to render from all of it's form versions. Normally you would like to test out the current against the previous form versions only. As this is a global service it is recommended to make a copy of this service first so that you may indicate the applicable versions to include in the A/B test in the copy.

The A/B Form Version Selector Service

If you wish to use the *A/B Testing Form Version Selector* service to assist in the A/B testing of your form, first make a copy of this service.

1. Navigate to *Services* from the menu bar, and then click *Core Global Services* from the dropdown menu.
2. Click the *Copy* button.
3. From the *Copy Service Definition* page enter the following details:
    - Select *Form Version Selector* from the *Service Type* dropdown.
    - Select *A/B Testing Form Version Selector* from the *Existing Service Name* dropdown.
    - Change the existing name defaullted for the *New Name* field to a suitable unique name for this service.
    - If required, change the defaulted number for the *Version* field to a suitable version number.
    - If required, select the organization that this form belongs to from the *Organization* dropdown. If left blank this service will be available to all organizations.
4. Click the *Save* button.

Once the *A/B Testing Form Version Selector* service is copied, it may then be customized to select the correct 'A' and 'B' versions of your form and then assigned to your form.

Please take note that if this copied *A/B Testing Form Version Selector* service is created as organization specific, then you can only customize if from any form belonging to that organization. That is, it won't be listed in the *Core Global Services* page and only those copied having not selected a specific organization from the *Organization* dropdown will be listed here.

For the global A/B Form Version Selector Service

To view the current settings for the copied *A/B Testing Form Version Selector* service, select this service from the Core Global Services page. The settings may be viewed from the *Parameters Edit* or *Parameters* tab.

The copied *A/B Testing Form Version Selector* service may be customized by updating the following parameters, as and if required. Please proceed with care and we strongly recommend seeking advice from Avoka before updating these parameters.

Parameter	System Default	Explanation
Ignore Form Version Request Parameter	False	Enable this parameter to ignore the value of the 'tmFormVersion' request parameter.
Included Form Versions	blank	A comma separeated list of form versions to include in the selection. Leave blank to include all versions.

The copied global *A/B Testing Form Version Selector* service can also be customized from your form as with the organization specific copied *A/B Testing Form Version Selector* service

For the organization specific A/B Form Version Selector Service

To view and customize the settings for the copied *A/B Testing Form Version Selector* service follow the instructions in the Configure A/B Testing (Manager v17.10) section.

Maestro Form Configuration in TM (Manager v17.10)

Unknown macro: 'redirect'

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

The list below identifies the topics covered within this section of the documentation.

- Import Maestro Form (Manager v17.10)
- View Maestro Forms in TM (Manager v17.10)
- Working with Maestro Form Versions (Manager v17.10)
- Delivery Channels (Manager v17.10)
- Receipts (Manager v17.10)
- Language Translator in Transact Manager (Manager v17.10)
- Submissions and Operations (Manager v17.10)

Import Maestro Form (Manager v17.10)

Unknown macro: 'redirect'

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

The list below identifies the list of topics covered in this section of the documentation.

- Build TM Form Version (Manager v17.10)
- Update TM Form Versions (Manager v17.10)
- Update TM Form Versions (v5.0.6 or later) (Manager v17.10)

Build TM Form Version (Manager v17.10)

Unknown macro: 'redirect'

Overview

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

> This process is usually only used to import Maestro forms 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 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 menu allow users 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 (

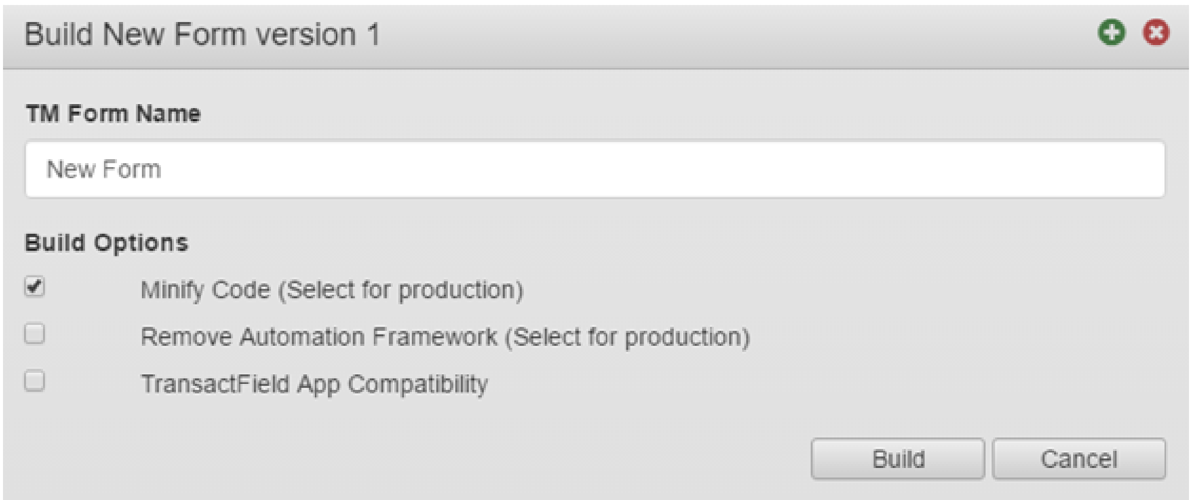
) button and dropdown menu.

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 v17.10) 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 the rendered form version. The screenshot below displays the *Build Window.* The available options from the Build Window are described below the screenshot.



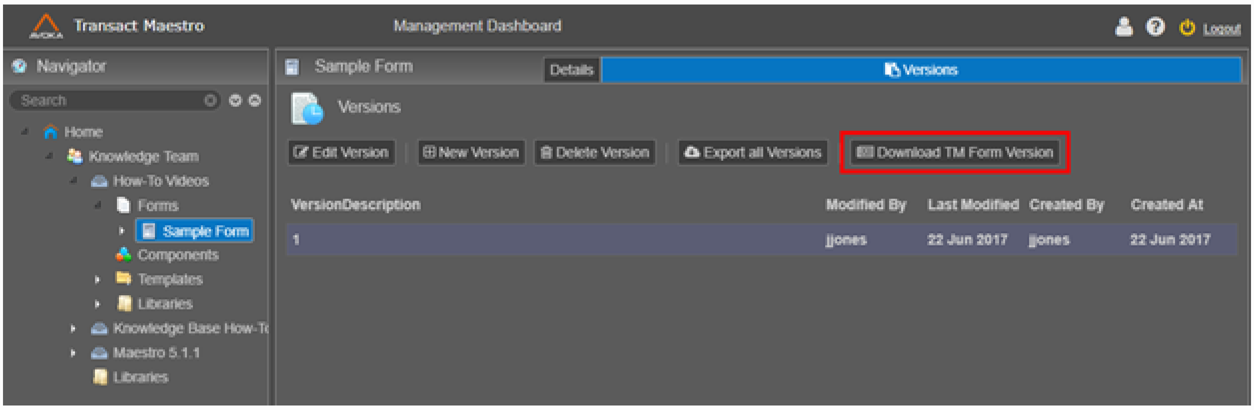
TM Form Name – This is the name of the form as it will appear in Transact Manager. By default, it will pre-populate with the existing name of the form, however you can change it as needed.

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 often 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

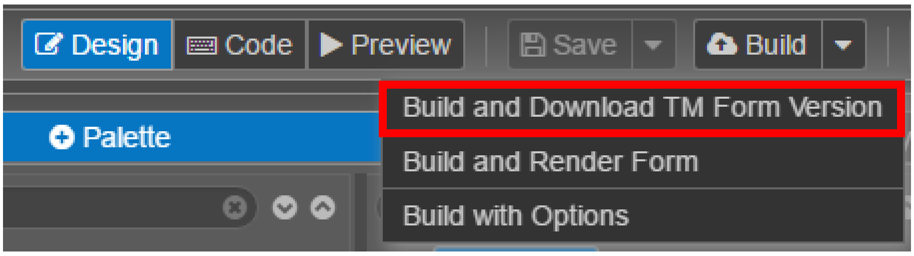
Please note that once a TM form version is built the user can download the form at any time from the *Management Dashboard*. The *Download TM Form Version* button is available on the *Versions* screen of the *Management Dashboard*. This button will only be available for selection once the TM form version 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

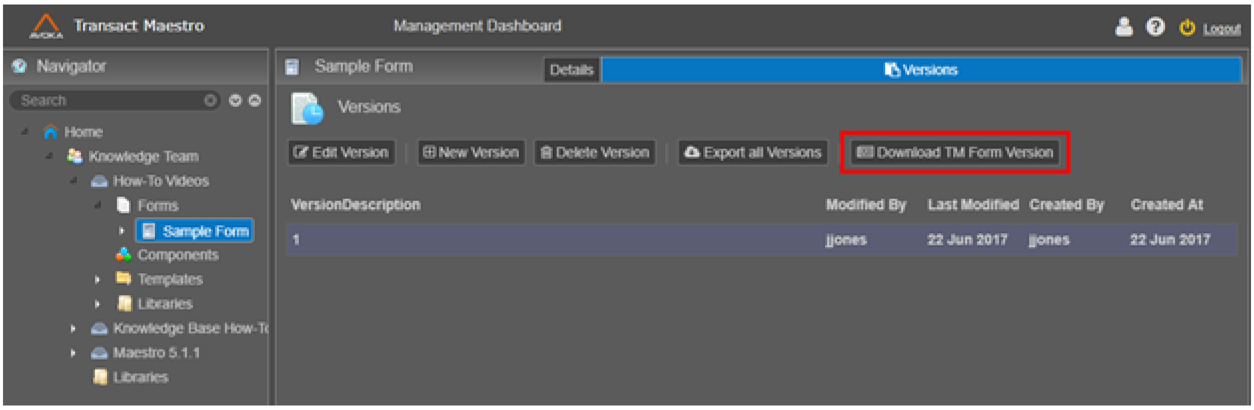
The TM form version zip file from Maestro is usually only used for import into lower environments (such as Test or UAT). When promoting a form to a higher environment this is done using an exported file from TM.

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 file 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*.

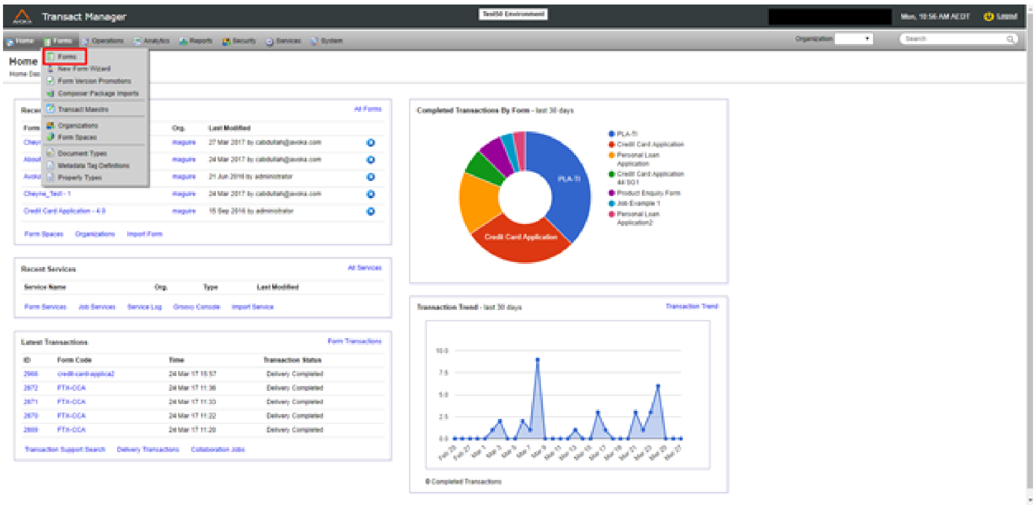
The *Download TM Form Version* button is available on the *Versions* screen of the *Management Dashboard*. This button will only be available for selection once the form has been built (in Maestro) at least once. The screenshot below highlights the *Download TM Form Version* button.



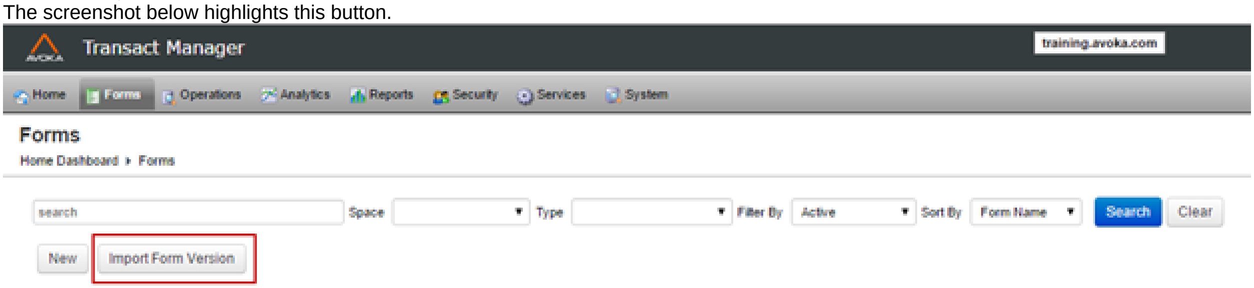
Now that you have built the TM form version and downloaded a zip file of the form, it is time to import the zip file into TM. The steps below document the process of importing the zip file into Transact Manager.

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*.

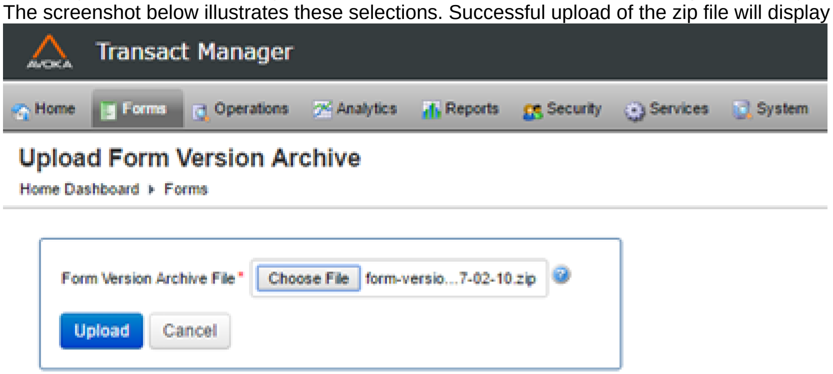
2. Select *Forms* from the *Forms* menu.
   This selection will display the forms page. The forms page displays every form that has been uploaded to the TM server that you are logged in to. The screenshot below illustrates this selection.



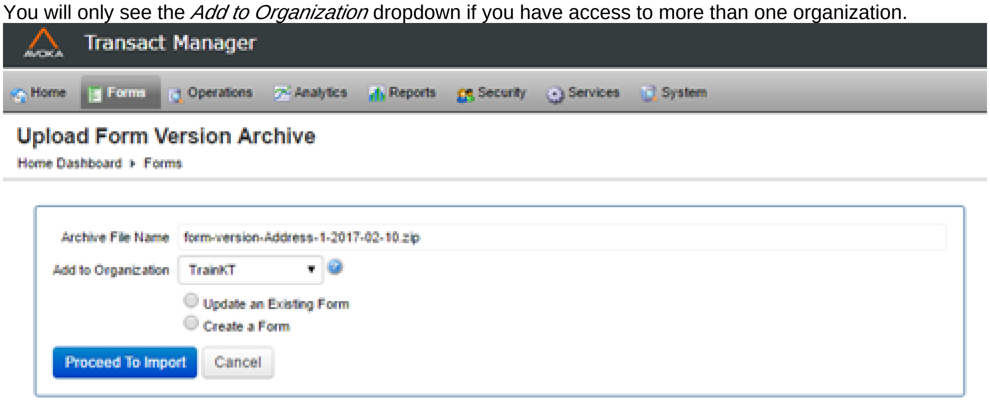
3. Select the *Import Form Version* button.
   The screenshot below highlights this button.



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.

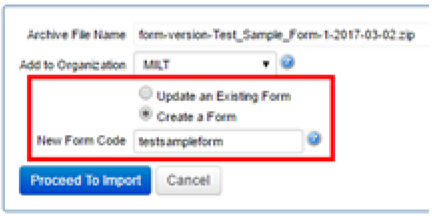


5. Select the appropriate organization (if relevant) for the form from the dropdown menu.
   You will only see the *Add to Organization* dropdown if you have access to more than one organization.



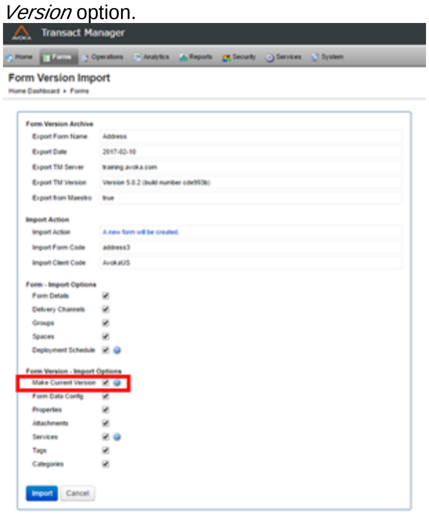
6. Select *Create a Form* from the available options.

a. **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, this name must be an alphanumeric string with no spaces. The screenshot below illustrates this option.

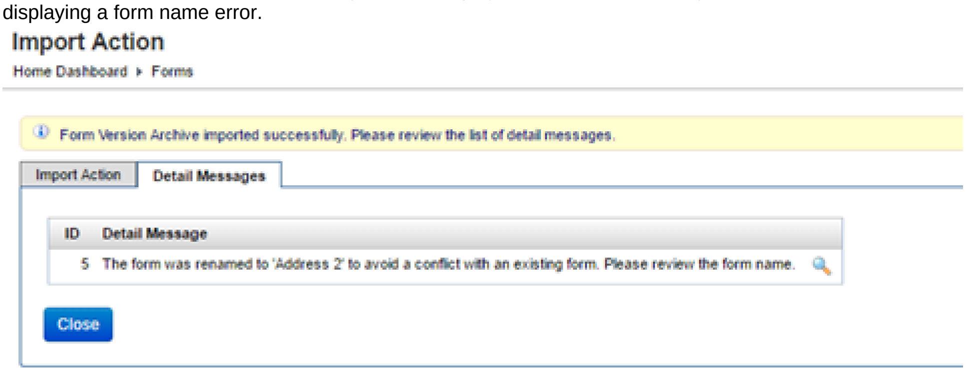


> Update an Existing Form is used when you need to update a form that has previously been imported into Transact Manager. Please see Update TM Form Version for more information.

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



8. 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.

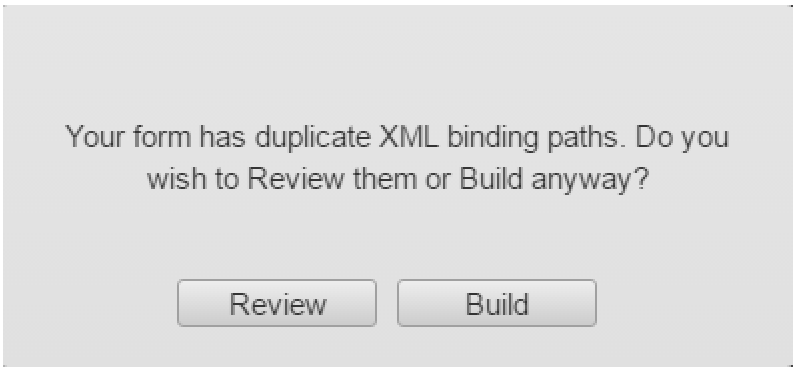


9. Click the *Close* button
Selecting close will redirect you back to the forms page.

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 error 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 v17.10)

Unknown macro: 'redirect'

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 v17.10) for more information on using the *Update From Maestro* button.

Create TM Form Version

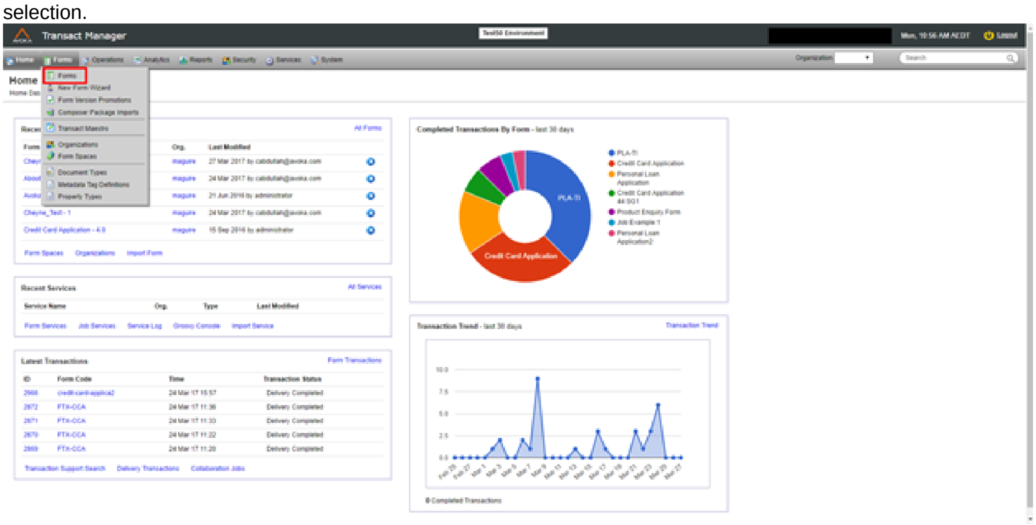
Once you have updated the form in Maestro, you need to build and download the TM form version. The process of building and downloading the TM form version is exactly the same as the process outlined in the Build TM Form Version (Manager v17.10) page of this documentation. See the Build TM Form Version (Manager v17.10) page 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.

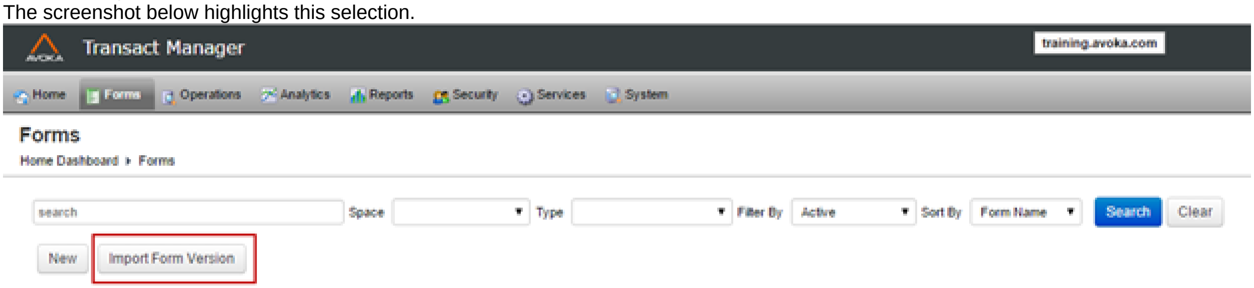
Import the Zip File to Transact Manager

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*.

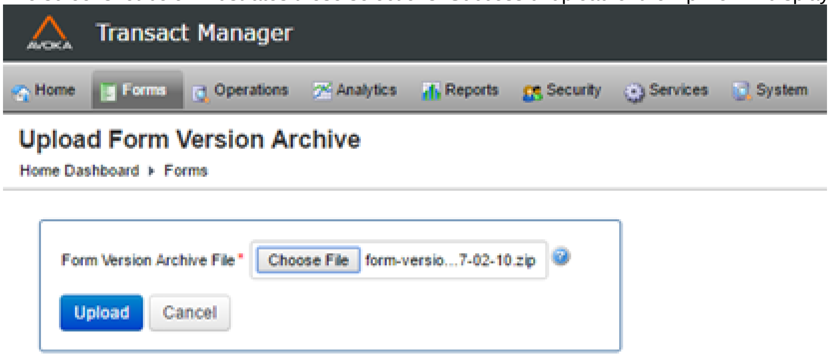
2. Select the *Forms* menu, and then click *Forms*.
   This selection will display the forms page. The forms page displays all forms uploaded to the TM server. The screenshot below illustrates this selection.



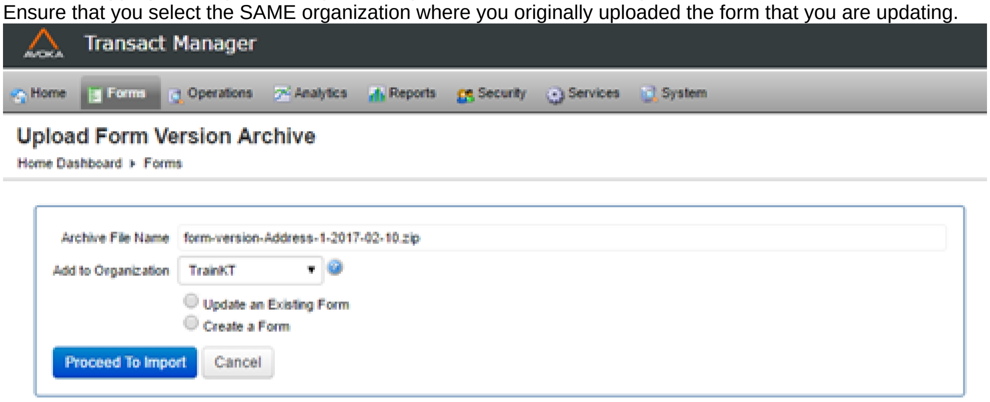
3. Select the *Import Form Version* button.
   The screenshot below highlights this selection.



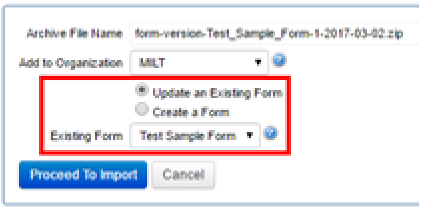
4. Select the *Choose File* button.
   Selecting this button will allow you to browse for and select the downloaded zip file. Once you have selected the appropriate zip file, click *Upload*. The screenshot below illustrates these selections. Successful upload of the zip file will display the *Upload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

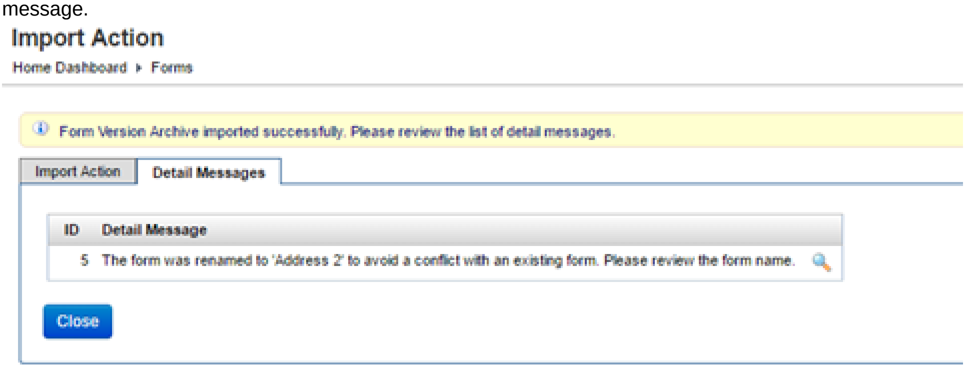


> The Create a Form option is used when you are importing a TM form version that has not already been imported into Transact Manager. Please see Build TM Form Version (Manager v17.10) for more information.

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 (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 (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 v17.10)

Unknown macro: 'redirect'

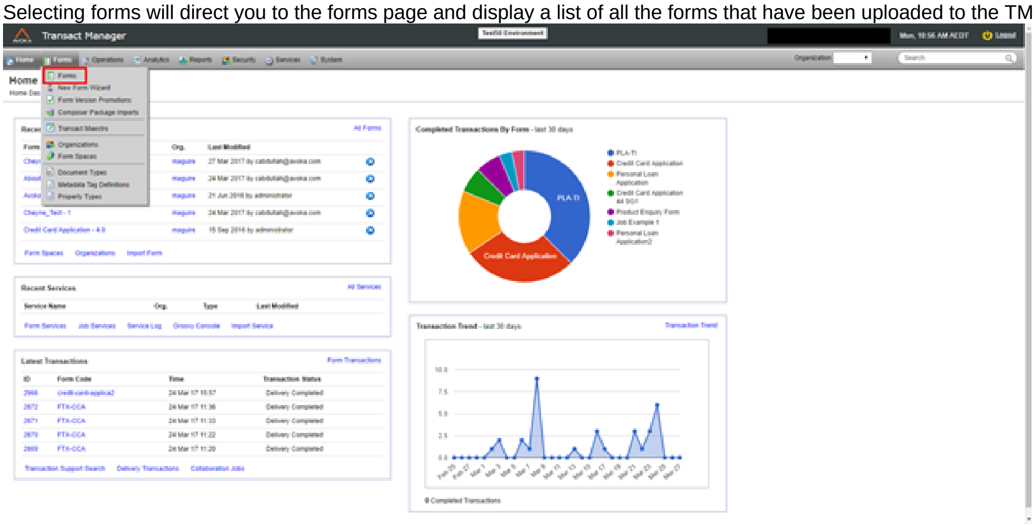
This option in only available to environments using Transact Manager 5.0.6 or higher. For updating forms in prior Transact Manager versions please see Update TM Form Versions (Manager v17.10).

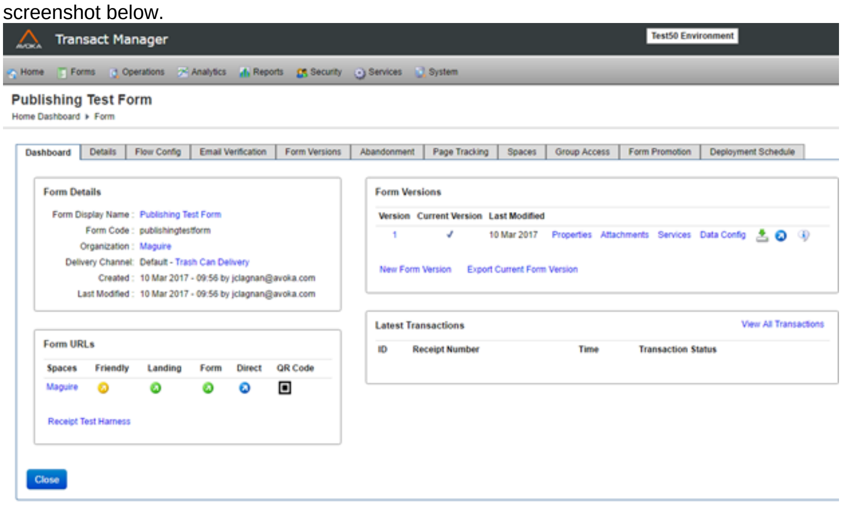
Overview

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.

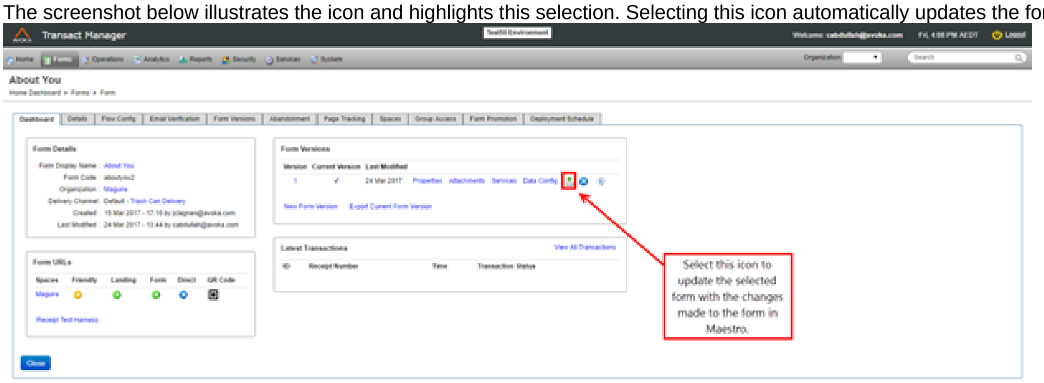
Update TM Form Version

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 log in.
4. Select the *Forms* menu, and 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.
   

5. Select the form that you want to update (ie 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 v17.10)

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

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 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.

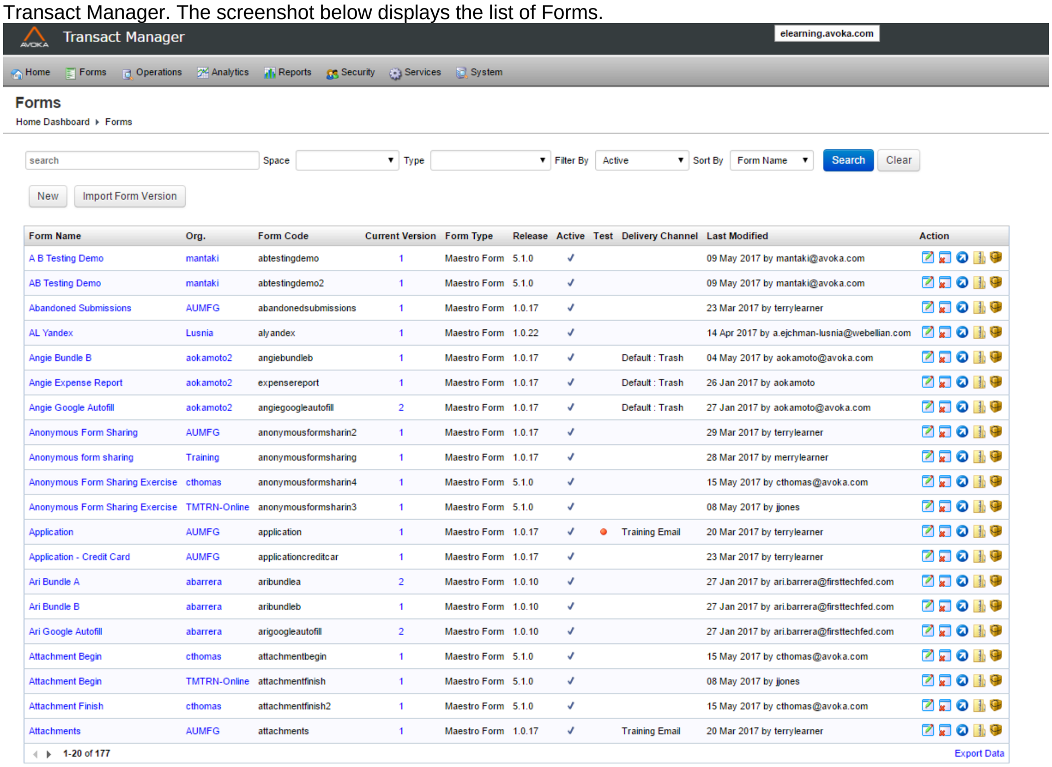
Forms are presented to users by being hosted on a form space and can have multiple versions. When a form has multiple versions, one of them is acknowledged as the *Current Form Version* and is used when rendering the form. Though some data is common and shared by all versions of a form, most settings 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 Yandex	Lusnia	alyandex	1	Maestro Form	1.0.22	✓			14 Apr 2017 by a.ejchman-lusnia@webellian.com	
Angie Bundle B	aokamoto2	angiebundleb	1	Maestro Form	1.0.17	✓		Default : Trash	04 May 2017 by aokamoto@avoka.com	
Angie Expense Report	aokamoto2	expensereport	1	Maestro Form	1.0.17	✓		Default : Trash	26 Jan 2017 by aokamoto	
Angie Google Autofill	aokamoto2	angiegoogleautofill	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	anonymousformsharing	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 jjones	
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 jjones	
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 v17.10)

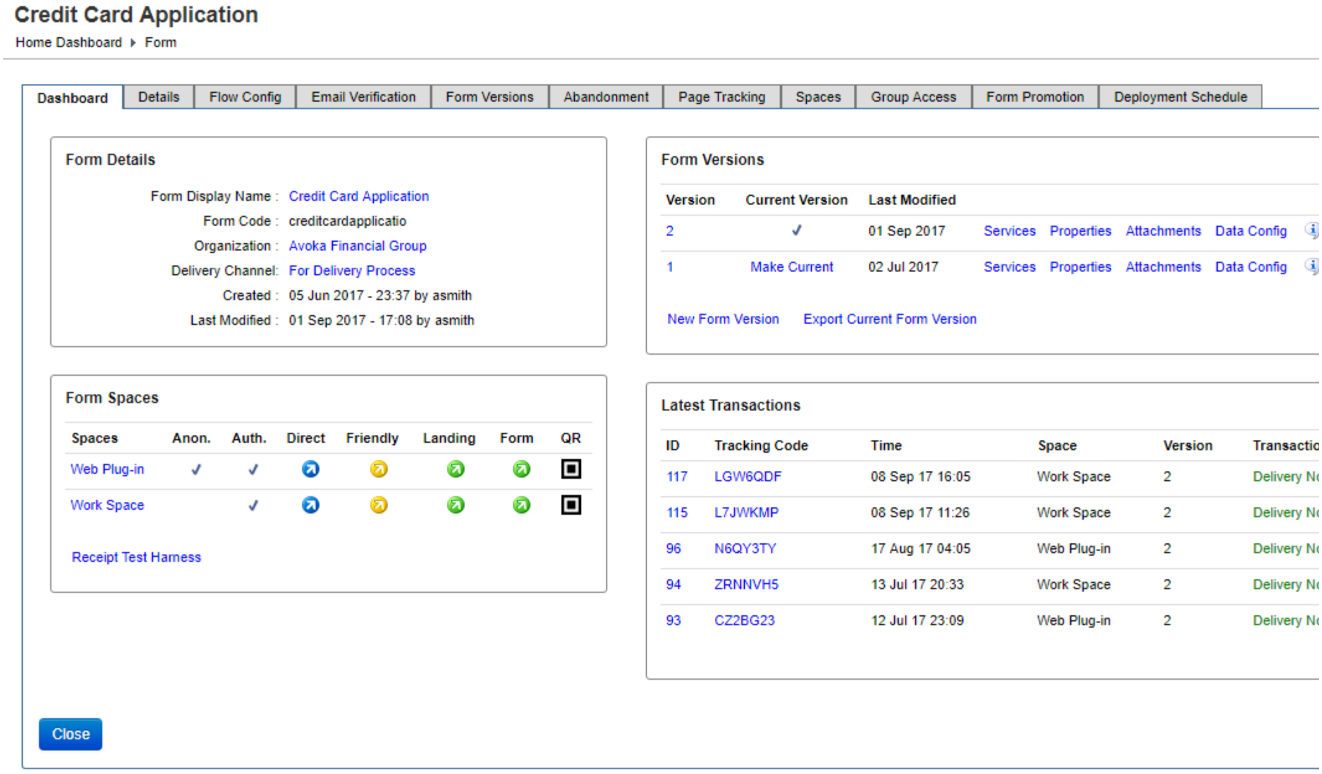
Unknown macro: 'redirect'

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.



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.

Use the following tabs to view information about the form configuration options.

Assign Form Space to Form (Manager v17.10)

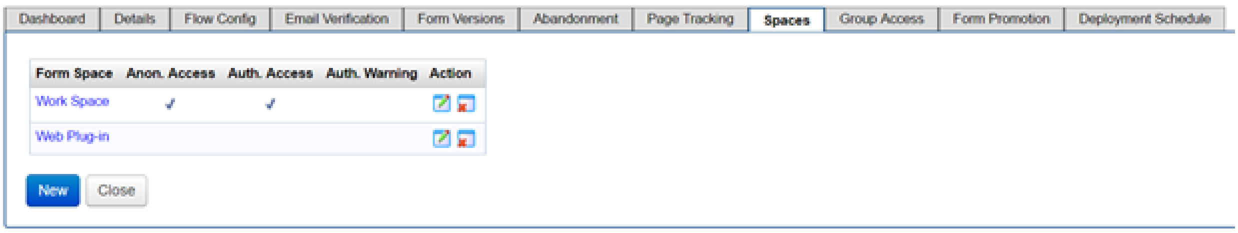
Unknown macro: 'redirect'

Associate Forms with a Space (Manager v17.10)

Associate Forms with a Space

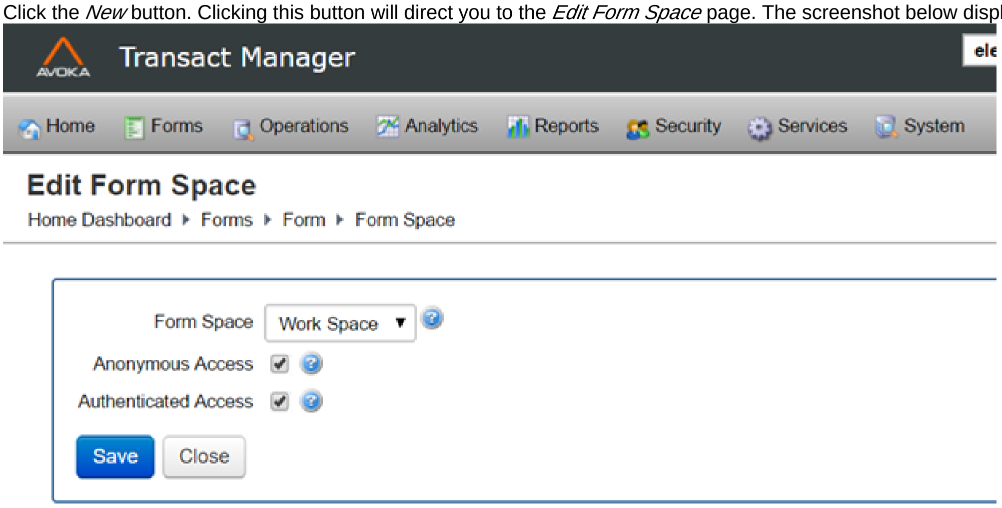
The steps below document the process of associating a form with a form space. The spaces available to a form are determined by the spaces associated with the form's organization.

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.



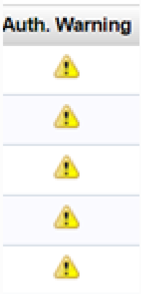
"Web Plug-in" is the default space used for TM form versions built in Maestro.

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.



5. Use the *Form Space* dropdown menu to select the Form Space that you want to associate with the selected form (eg Work Space).
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 identifying an issue with the access to the form will be added to the list of forms that are configured for the selected space.



Property Types (Manager v17.10)

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)

Page Contents:

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.

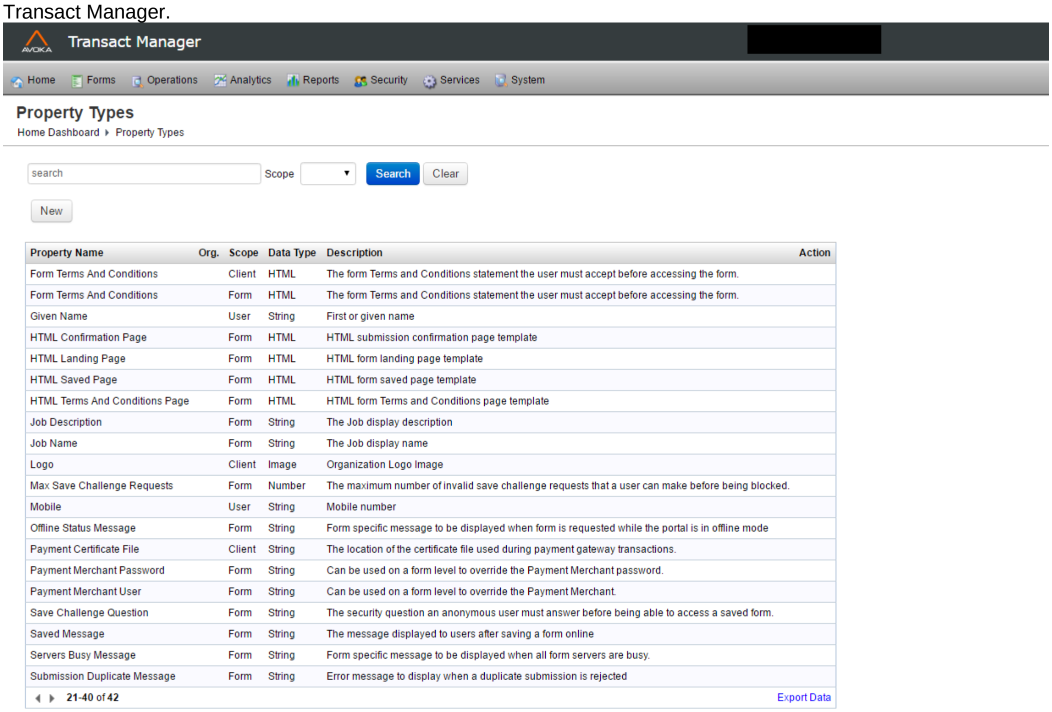
If you choose a data type that restricts certain values (eg Number), administrators will be prevented from entering unacceptable values. This helps to avoid errors caused by invalid data being passed to a form.

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.



Property Name	Org.	Scope	Data Type	Description	Action
Form Terms And Conditions		Client	HTML	The form Terms and Conditions statement the user must accept before accessing the form.	
Form Terms And Conditions		Form	HTML	The form Terms and Conditions statement the user must accept before accessing the form.	
Given Name		User	String	First or given name	
HTML Confirmation Page		Form	HTML	HTML submission confirmation page template	
HTML Landing Page		Form	HTML	HTML form landing page template	
HTML Saved Page		Form	HTML	HTML form saved page template	
HTML Terms And Conditions Page		Form	HTML	HTML form Terms and Conditions page template	
Job Description		Form	String	The Job display description	
Job Name		Form	String	The Job display name	
Logo		Client	Image	Organization Logo Image	
Max Save Challenge Requests		Form	Number	The maximum number of invalid save challenge requests that a user can make before being blocked.	
Mobile		User	String	Mobile number	
Offline Status Message		Form	String	Form specific message to be displayed when form is requested while the portal is in offline mode	
Payment Certificate File		Client	String	The location of the certificate file used during payment gateway transactions.	
Payment Merchant Password		Form	String	Can be used on a form level to override the Payment Merchant password.	
Payment Merchant User		Form	String	Can be used on a form level to override the Payment Merchant.	
Save Challenge Question		Form	String	The security question an anonymous user must answer before being able to access a saved form.	
Saved Message		Form	String	The message displayed to users after saving a form online	
Servers Busy Message		Form	String	Form specific message to be displayed when all form servers are busy.	
Submission Duplicate Message		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 v17.10)

Unknown macro: 'redirect'

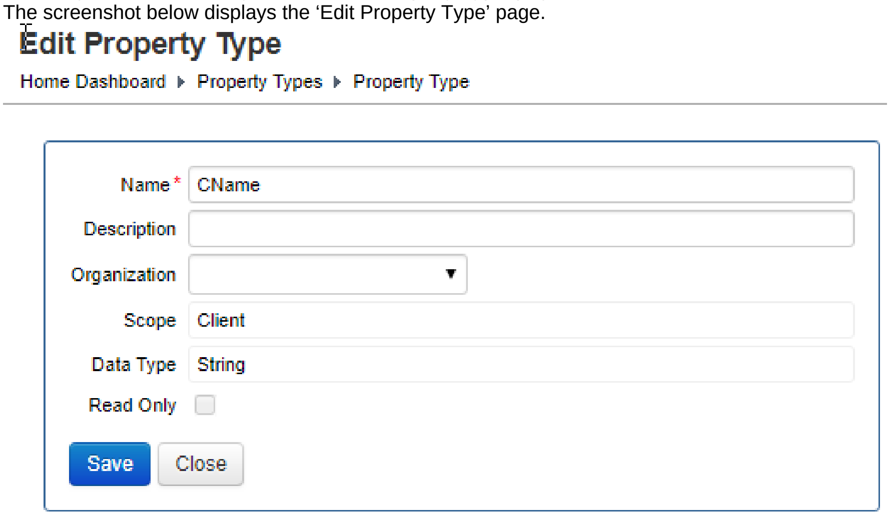
Related Pages:

- 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.



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. The *Read Only* field cannot be updated here.
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.

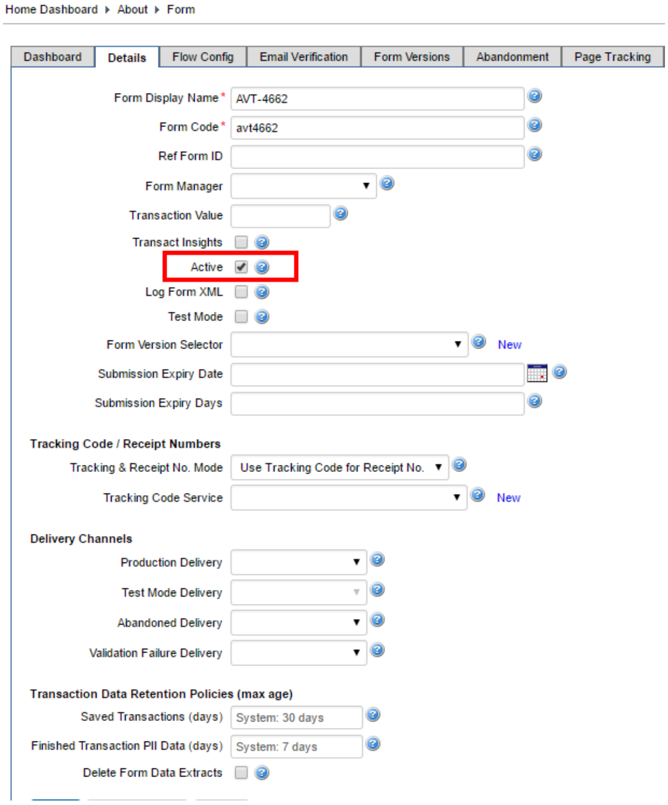
Remove a Form (Manager v17.10)

Unknown macro: 'redirect'

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.
   

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.*

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)

Working with Maestro Form Versions (Manager v17.10)

Unknown macro: 'redirect'

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

The following topics are covered in this section of the documentation.

- Manage Maestro Form Versions (Manager v17.10)
- Overview of the Form Version Tabs (Manager v17.10)
- Overview of Form Data Config Tabs (Manager v17.10)

Manage Maestro Form Versions (Manager v17.10)

Unknown macro: 'redirect'

Overview

Transact Manager offers a flexible mechanism to preserve multiple versions of a form. This mechanism allows users to switch between different form versions and 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 v17.10) 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.

Select the links below to see the available methods to navigate to the form versions section of a selected form.

View a List of Form Versions

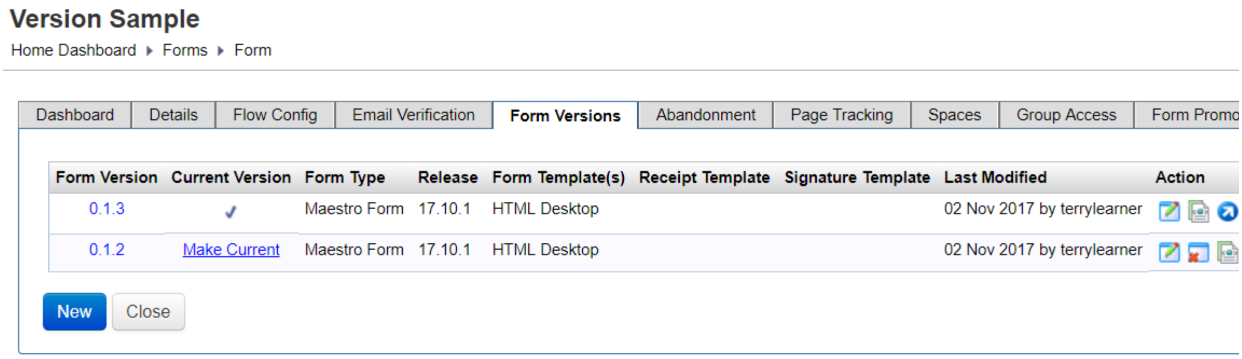
To view the list of all form versions that have been set up for a form:

1. Select *Forms* from the menu bar, and then select *Forms* from the dropdown menu.
2. Select a 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 when and by whom 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 *Version* column)
	View and/or change the data configuration (refer to the View Maestro Forms in TM (Manager v17.10) 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)



Assign a Different Form Version as the Current

The current form version is the form version that is rendered to the user when the form is requested.

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

1. Select *Forms* from the menu bar, and then select *Forms* from the dropdown menu.
2. Select a 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:
   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 v17.10)

Unknown macro: 'redirect'

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.

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)

Delete a Form Version (Manager v17.10)

Unknown macro: 'redirect'

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 v17.10) 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.

Overview of the Form Version Tabs (Manager v17.10)

Unknown macro: 'redirect'

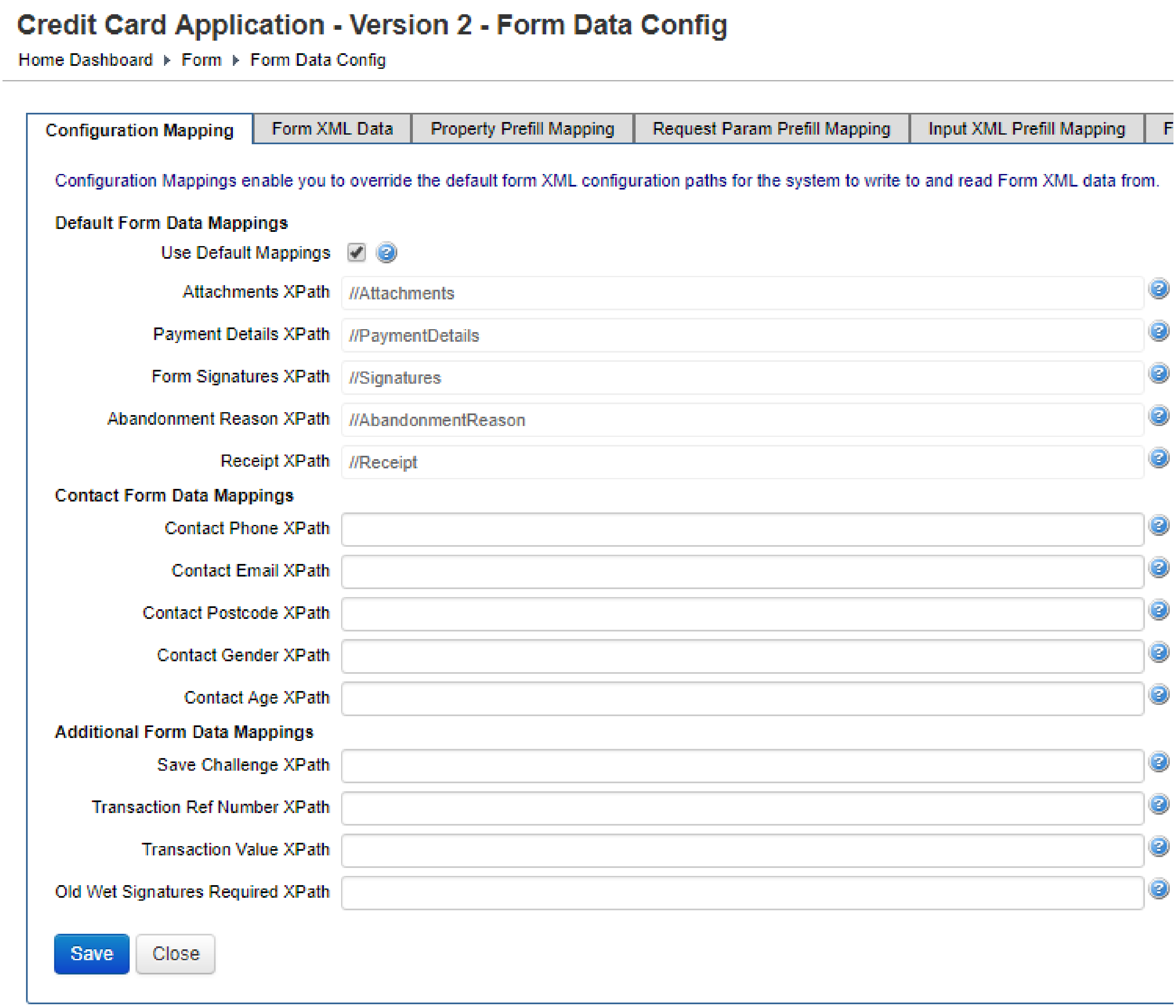
When you select a specific form version as explained in the *Manage Maestro Form Versions* section, Transact Manager displays the tabs that are applicable to this form version. That is, you may notice that the tabs displayed for your version of the form may vary from the example screenshot below.

Use the following tabs to view information about the form version configuration options.

Overview of Form Data Config Tabs (Manager v17.10)

Unknown macro: 'redirect'

When you select the *Data Config* link for a form version the *Form Data Config* tabs will display. The following screenshot is an example of the *Form Data Config* tabs.



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:

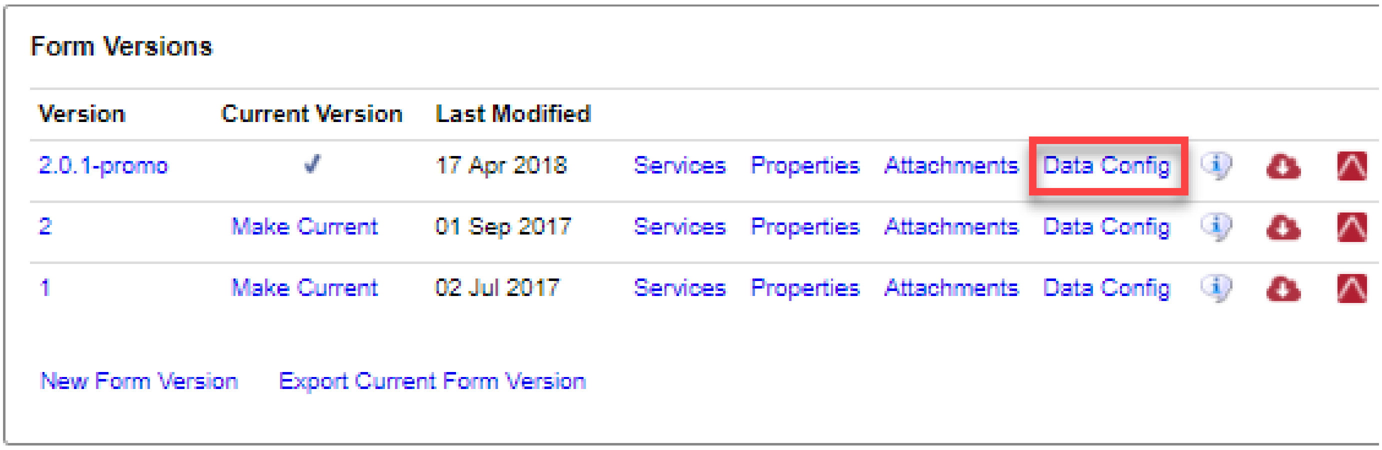
- Prefill a form with some known details, when selected by the user. The three different prefill methods supported are property, request parameter, and input XML. Refer to Property Prefill Mapping, Request Param Prefill Mapping, and Input XML Prefill Mapping sections of the documentation.
- Capture and 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 Mapping.
- Provide an alternative data structure, according to your enterprise's requirements, to the default XML. Refer to Form XML Data.
- 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.

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:

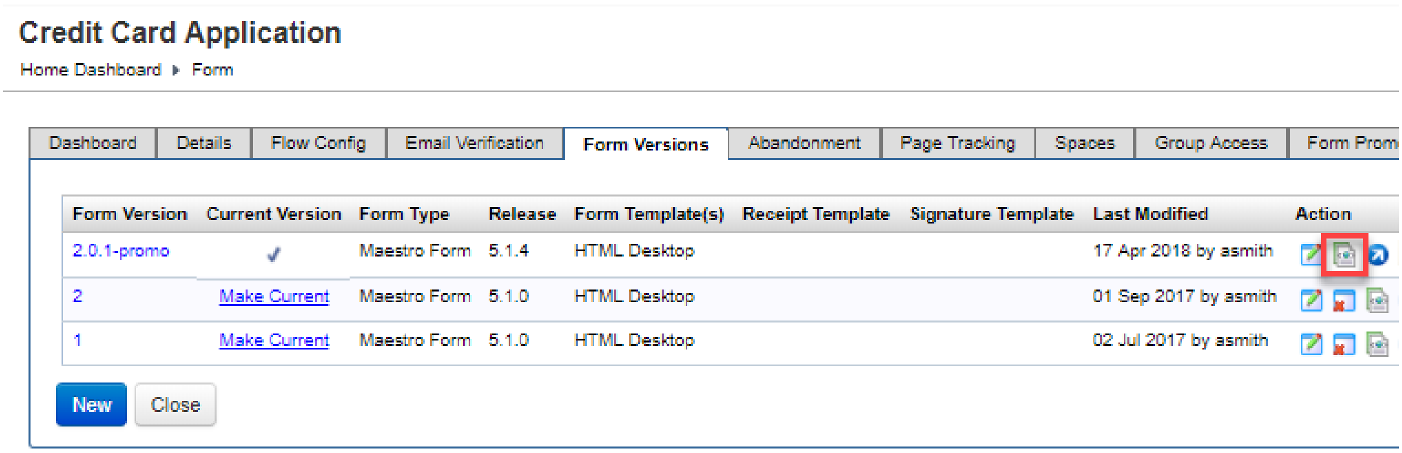
1. Navigate to *Forms* from the menu bar, and then click *Forms* from the dropdown menu.
2. Find and select your form from the list (either click the *Edit* icon ( ) in the *Action* column or the link in the *Form Name* column).
3. In the *Form Versions* section, find the form version and click the *Data Config* link alongside it. Clicking this link will display the *Form Data Config* tabs.



The data configurations of a form version may also be reached via the *Form Version* tab:

3. Switch to the *Form Versions* tab.

4. Click on the icon for the form version in the *Action* column.



Options for Prefilling a Form

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 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 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 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.

Use the following tabs to view information about the form version data configuration options.

Delivery Channels (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

Error rendering macro 'contentbylabel'

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

Page Contents:

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 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 are used will need to be made. 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 -** This method 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 -** This method 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 -** This method differs from *Email* in that the email sent does not contain any submission details. Instead, the email contains a link to a secure page in Transact Manager where the submission details can be downloaded.
4. **Web Service -** This method 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 -** This method 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.

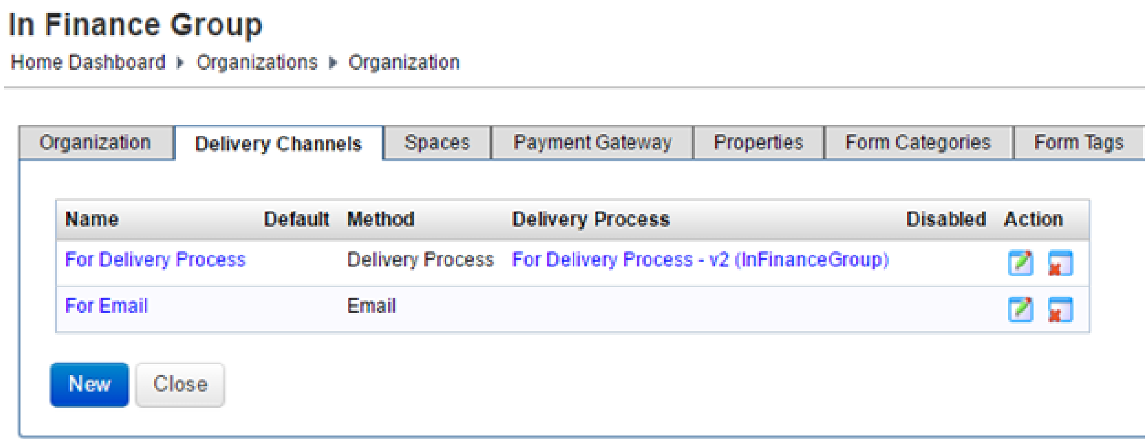
Whilst all five delivery methods are currently supported in Transact Manager, the *Delivery Process* method is the most used and recommended. The delivery process offers a more customizable approach for a more immediate and secure form of delivery.

More information about these delivery methods can be found in the Delivery Methods (Manager v17.10) 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 then select *Organization* from the Forms dropdown menu.
2. Select an 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. The screenshot below displays the contrents of the *Delivery Channels* tab.


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
For Delivery Process
Delivery Process
For Delivery Process - v2 (InFinanceGroup)
For Email
Email
New
Close

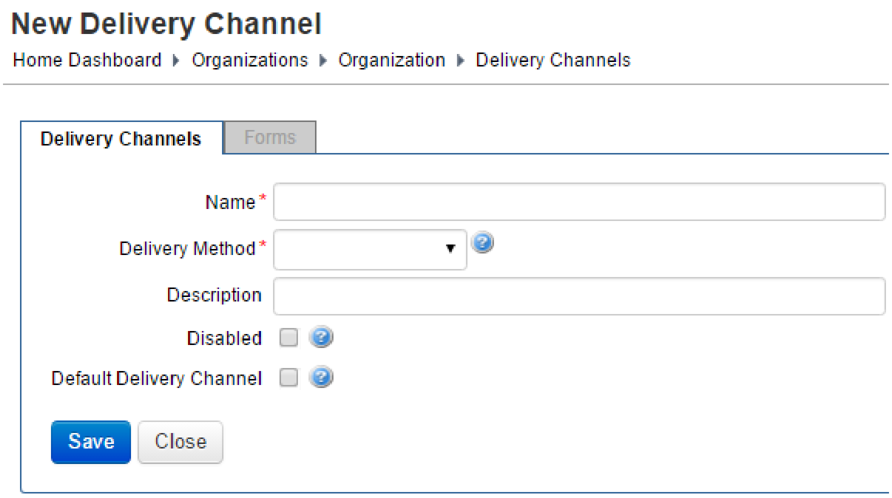
Create a Delivery Channel (Manager v17.10)

Unknown macro: 'redirect'

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.



9. Enter the details applicable for the selected delivery method.

Related Pages:

- 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)

Associate a Delivery Channel to a Form (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

Associate a Delivery Channel to a Form

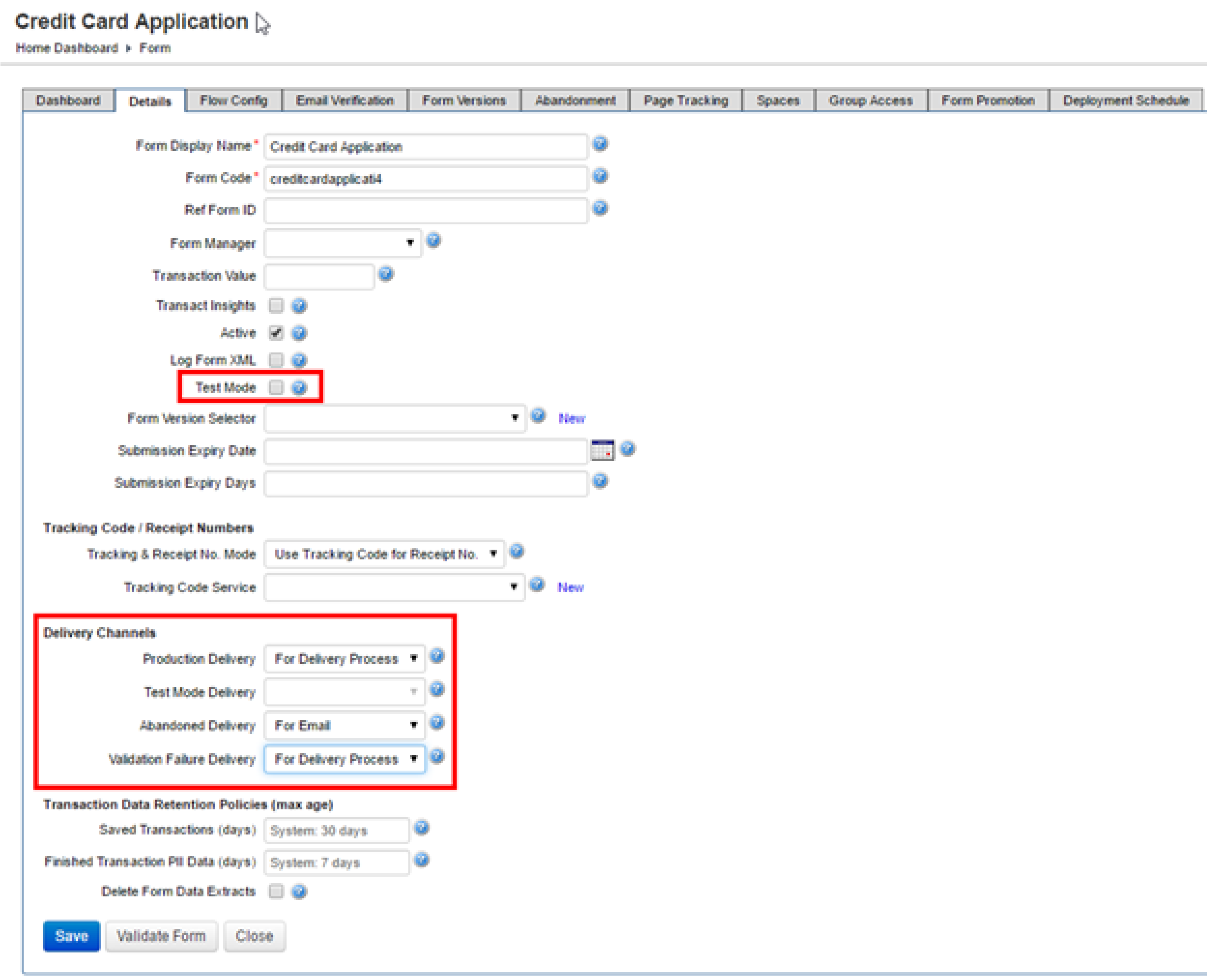
As part of the Transact Manager ecosystem, a user selects a form and the following might happen:

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:

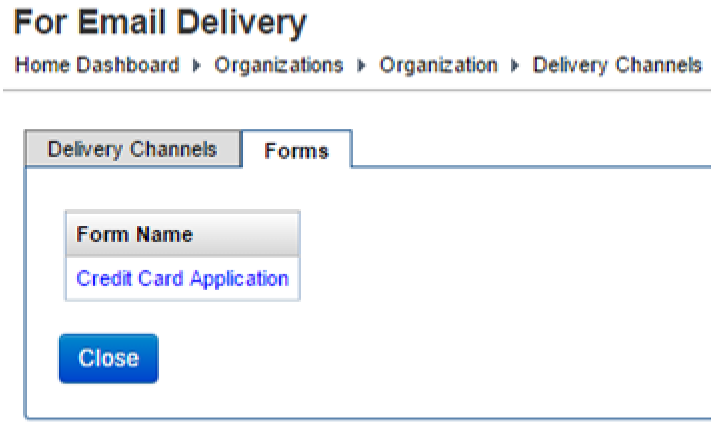
1. Select *Forms* from the menu bar and *Forms* from the dropdown menu.
2. Find and select your form.
3. Click on the *Details* tab.
4. In the *Delivery Channels* section, from each of the following dropdowns you may choose a separate delivery channel:
    a. *Production Delivery* to send successful 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.



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.



Delete a Delivery Channel (Manager v17.10)

Unknown macro: 'redirect'

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 v17.10) #CheckFormAssocatedDeliveryChannel 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 v17.10) 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.

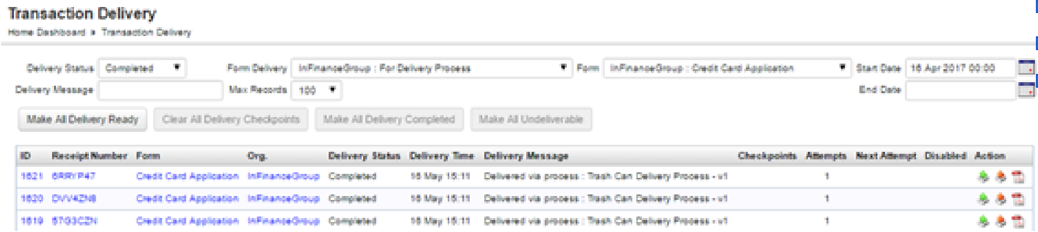
Monitoring Submission Delivery (Manager v17.10)

Unknown macro: 'redirect'

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.



You can view details for each submission, which also allows you to change the delivery status for an individual submission.

Related Pages:

- 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)

Delivery Methods (Manager v17.10)

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.

Related Pages:

- 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)

Receipts (Manager v17.10)

Unknown macro: 'redirect'

Overview

Receipts are useful to both clients and end users and are an essential part of the transaction and submission process. Receipts 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.

User receipts are primarily obtained and delivered 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 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.

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 (Manager v17.10)

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)

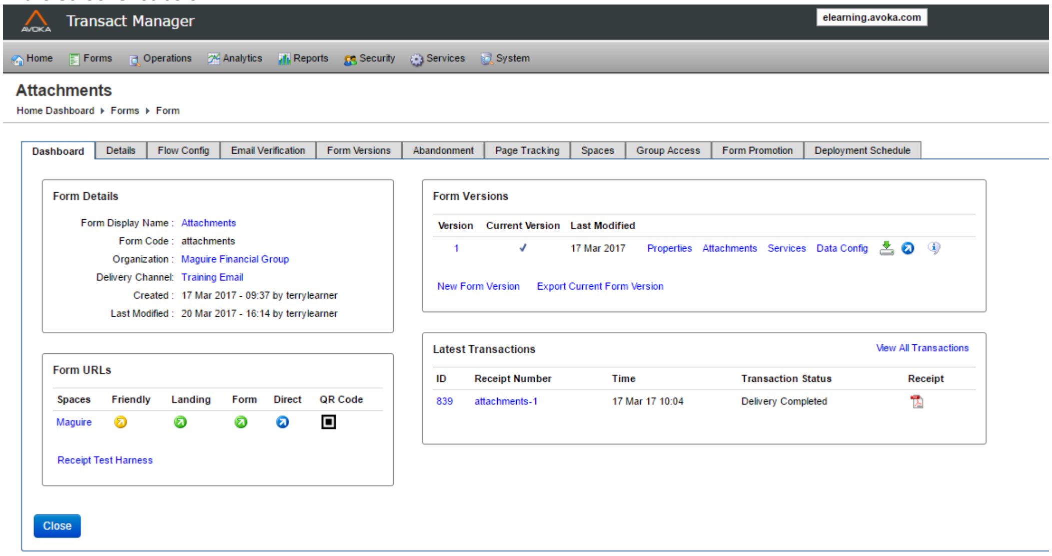
Configure Receipts for Forms

Receipts in Transact Manager 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:

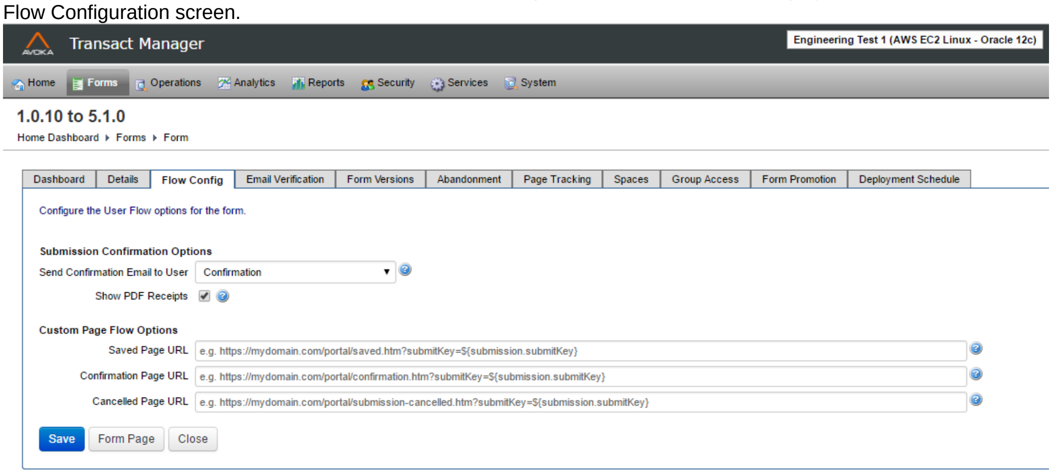
- Confirmation and Receipt Attachment – Select this option to send a confirmation email to the user. This confirmation email will attach the PDF receipt which the user can download.
- Confirmation and Receipt Link – Select this option to send a confirmation email with a secure link to download the PDF 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.



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.



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 v17.10)

Unknown macro: 'redirect'

Related Pages:

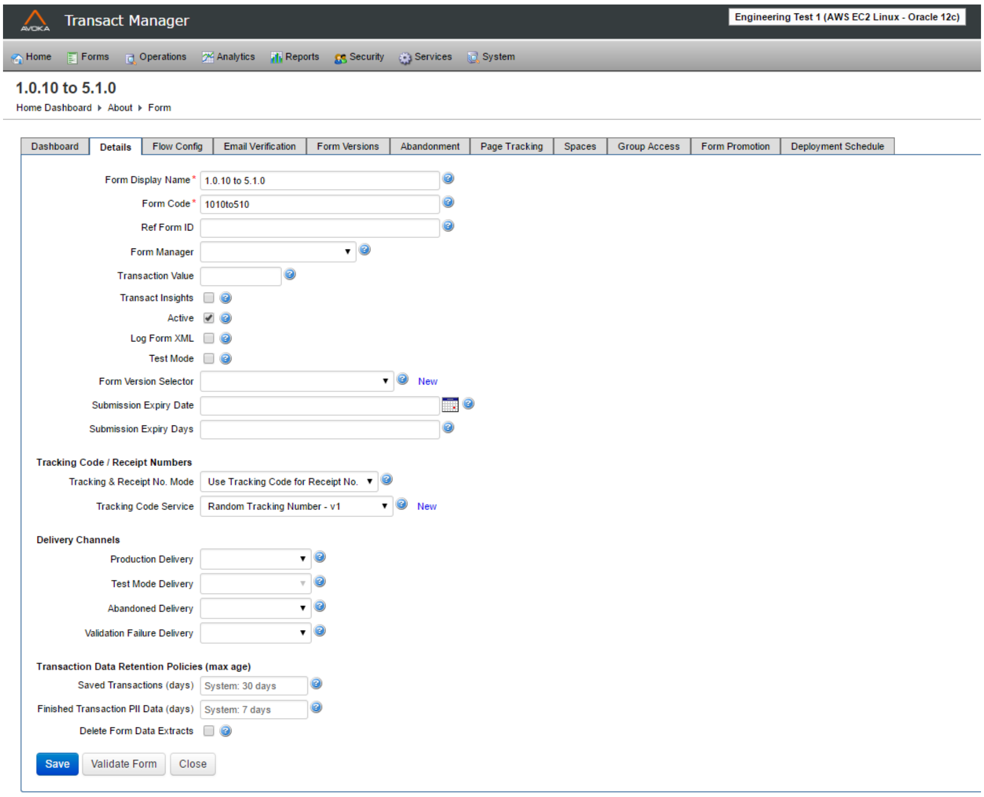
- Configure Receipts for Forms (Manager v17.10)
- Configure Receipts for Forms (Manager v5.1)
- Receipt Numbers and Tracking Codes (Manager v17.10)
- Receipt Numbers and Tracking Codes (Manager v5.1)
- Receipts (Manager v17.10)
- Receipts (Manager v5.1)

Receipt Numbers and Tracking Codes

Receipt numbers are used to uniquely identify submitted transactions. A tracking code is a unique alphanumerical 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 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.*

Customize Headers and Footers (Manager v17.10)

Unknown macro: 'redirect'

Overview

This article describes how you can add and customize headers and footers on your form receipt when using the "Dynamic PDF Receipt 2" receipt render service introduced in TM 17.10.0. TM allows you to turn on simple headers and footers and apply them to all forms, all forms of an organization or a specific form version. These headers can include static content and page numbers.

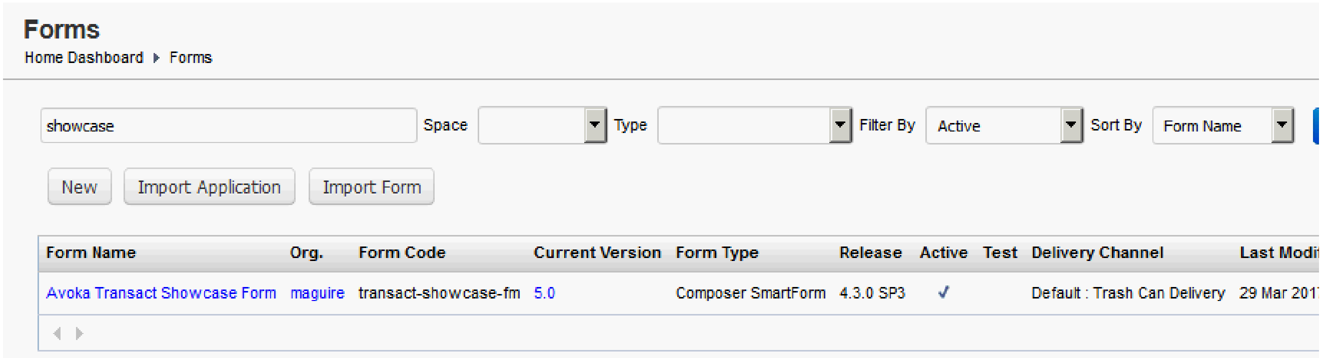
If you need more complex headers or footers including content from the form data model, you can also add custom headers or footers to your form by providing a form function. In addition, legacy Composer headers and footers used in older versions are also supported.

Using TM Receipt Options

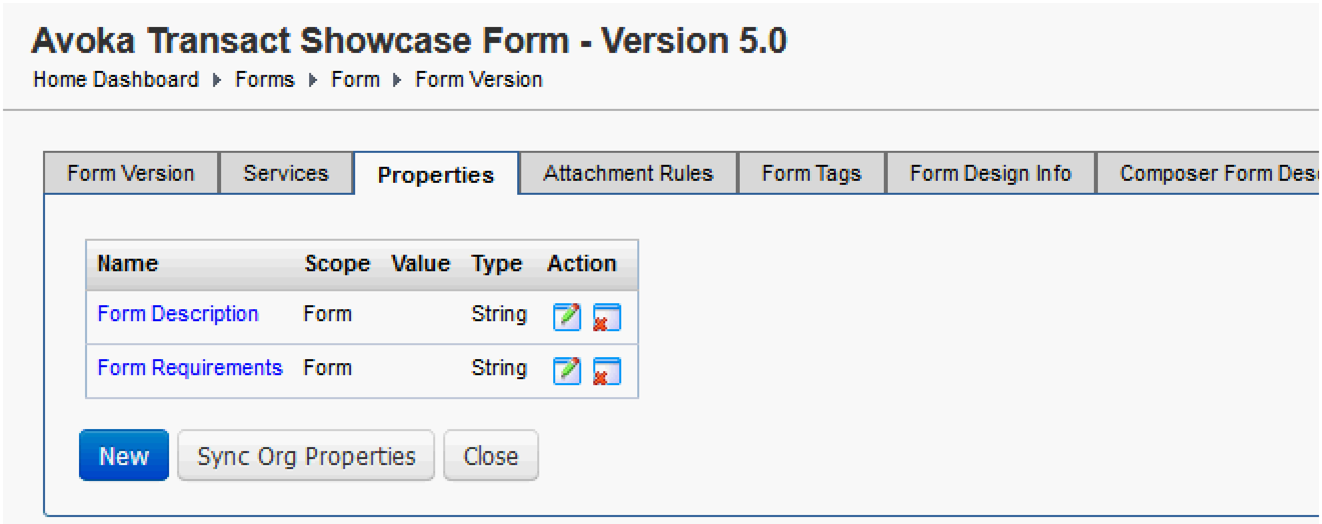
The "Dynamic PDF Receipt 2" service provides a service parameter named "receiptPropertiesJson" that you can use to customize your receipt, including simple headers and footers.

The following steps will enable headers and footers for a specific form version that is using the "Dynamic PDF Receipt 2" service on your TM instance. The same changes can also be made for all forms belonging to an organization, or for all forms using the "Dynamic PDF Receipt 2" service by updating the "Receipt Properties Json" parameter of this service.

1. Navigate to the forms page ("Forms > Forms") and find the form you will be editing.



2. Edit the form to find its current form version and edit it. Switch to the "Properties" tab.



.

3. If there is already a property named "Receipt Properties", edit it. Otherwise, click "New" and select the "Receipt Properties" entry. This will bring up the receipt properties for you to edit. By default, the receipt property JSON shipped with TM 17.10.0 was:

```
{
    /* phantomjs configuration options */

    // see http://phantomjs.org/api/webpage/property/viewport-size.html for available options
    "viewportSize": {
        "width": 800,
        "height": 600
```

```
    },

    // see http://phantomjs.org/api/webpage/property/paper-size.html for available options
    "paperSize": {
        "format": "A4",
        "orientation": "portrait",
        "margin": {
            "top": "1.5cm",
            "left": "1.5cm",
            "bottom": "1.5cm",
            "right": "1.5cm"
        },
        "header": {
            "height": "0cm"
        },
        "footer": {
            "height": "0cm"
        }
    },

    // see http://phantomjs.org/api/webpage/property/settings.html for available options
    "settings": {
        "localToRemoteUrlAccessEnabled": true,
        "ignoreSslErrors": true
    },

    /* --- Example of custom headers - uncomment to use, note you should also set the header height
appropriately in the papersize object
    "headers": [
        {
            "pageFilter" : "*",
            "template": "<h1 class='phantom-header'>Default Header</h1>"
        },{
            "pageFilter" : "1",
            "template": "<h1 class='phantom-header'>First Page Header</h1>"
        }
    ],
    */

    /* --- Example of a custom footer - uncomment to use, note you should also set the footer height
appropriately in the papersize object
    "footers": [
        {
            "pageFilter" : "*",
            "template": "<p class='phantom-footer'>Page ${page} of ${numPages}</p>"
        }
    ],
    */

    /* transact configuration options */
    "config": {
        "loadTimeoutMS": 20000,
        "postLoadTimeoutMS": 500,
        "windowsZoomFactor": -1, // use -1 to leave zoom unchanged
        "linuxZoomFactor": 0.79, // use -1 to leave zoom unchanged
        "supportHeaderFooterCSSClasses": true,
        "logOptions": false,
        "logHeadersFooters": true,
        "logResourceEvents": false,
        "logFormCallbacks": true,
        "disableFormOverrides": true, // setting this to true will prevent the form from overriding any of
these settings
        "supportOldStyleFormOverrides": "composer", // form types that support old style form overrides
(eg getFooterDetails()), must be one of "composer","maestro","any"
        "treatFormErrorsAsFatal": false,
        "forceError": false, // setting this to true will force the render to fail, but will give you
access to the logs for debugging
        "customCSS": ".phantom-header {} .phantom-footer {}"
    }
}
```

4. Find the "headers" and "footers" section (by default commented out) and uncomment them. Also find the "paperSize" section and change the header height and footer height to a reasonable number, so that your receipt properties now contain something like this:

```
...
    // see http://phantomjs.org/api/webpage/property/paper-size.html for available options
```

```
    "paperSize": {
        "format": "A4",
        "orientation": "portrait",
        "margin": {
            "top": "1.5cm",
            "left": "1.5cm",
            "bottom": "1.5cm",
            "right": "1.5cm"
        },
        "header": {
            "height": "3cm"
        },
        "footer": {
            "height": "3cm"
        }
    },
...

    "headers": [
        {
            "pageFilter" : "*",
            "template": "<h1 class='phantom-header'>Default Header</h1>"
        },{
            "pageFilter" : "1",
            "template": "<h1 class='phantom-header'>First Page Header</h1>"
        }
    ],

    "footers": [
        {
            "pageFilter" : "*",
            "template": "<p class='phantom-footer'>Page ${page} of ${numPages}</p>"
        }
    ],
...
```

5. Save your changes. Because you are editing the receipt properties in the receipt render service, this change will affect all forms except those for which the receipt properties have been overridden on the organization or form level.

6. Test the changes by submitting a form that doesn't define its own receipt headers and footers and inspecting the receipt.

Understanding How Headers and Footers are Rendered

When creating the PDF receipt phantomjs renders each header and footer in a separate HTML DOM prior to PDF production. This has several consequences

1. The pagination process requires a fixed header and footer height in order to correctly size the pages. This means that every page will reserve a fixed amount of space for the header and footer even if there is no content present. You can set this fixed header and footer height by setting the **paperSize.header.height** or **paperSize.footer.height** properties in the JSON options file. Content that exceeds this height will be clipped and not show on the receipt.

2. Because each header and footer is rendered in a seperate HTML DOM, CSS classes defined in the form itself would not ordinarily be available to use, but instead styling would need to be applied using inline styles. In order to make styling easier the service provides some additional capabilities to help make styling easier.
   a. You can use the **config.customCSS** property to add additional css style definitions to the form.
   b. If the **config.supportHeaderFooterCSSClasses** is set to true then any css classes used in a header or footer template are converted automatically to inline styles. Note this also allows use of CSS classes already defined in the form itself not just those defined in the **config.customCSS** property.

Using Header and Footer Templates

The **headers** and **footers** properties of the JSON options file allow you to specify an array of templating rules that are run to determine the content of the header or footer respectively. Each rule has a **pageFilter** and **template** property.

The **template** property contains the HTML that defines the header/footer content. The tokens ${page} and ${numPages} will be replaced with the current page number and total number of pages respectively. Page numbering will start from 1. The content must be a single HTML element so if you need multiple elements be sure to wrap them in an appropriate <div> element.

The **pageFilter** property is a string that contains either the page number or a * to match all pages not otherwise filtered.

You can enable logging of the templates used by setting the **config.logHeadersFooters** property to true.

Controlling Custom Headers and Footers From The Form

Forms can optionally use javascript to control the content and styling of headers and footers. You may want to to do this for example to inject calculated or dynamic content in the header or footer. To allow a form to control the header/footer behavior first you will need to make sure the **config.disableFormOverrides** property of the JSON options file is set to false.

You will then need to inject a function into the window object of your form using javascript inside your form as in the example below.

```
window.phantomReceiptCallback = function(actionName,data) {
        if (actionName=="orientation") {
                // return either "landscape" or "portrait" or fall thru to use the value defined in TM
                // this action is only invoked once per form
        }
        if (actionName=="format") {
                // return the paper format eg "A4","letter",etc or fall thru to use the value defined in TM
                // this action is only invoked once per form
        }
        if (actionName=="margin") {
                // return a JSON object defining the margin eg {"top": "0.5cm","left": "0.5cm","bottom": "0.5
cm","right":"0.5cm"} or fall thru to use the value defined in TM
                // this action is only invoked once per form
        }
        if (actionName=="headerHeight") {
                // return the header height  eg "1cm" or fall thru to use the value defined in TM
                // this action is only invoked once per form
        }
        if (actionName=="footerHeight") {
                // return the footer height  eg "1cm" or fall thru to use the value defined in TM
                // this action is only invoked once per form
        }
        if (actionName=="header") {
                // return the header template string eg "<p>This is the header</p>" or fall thru to use the
value defined in TM
                // you can specify the tokens ${page} and ${numPages} in the template you are returning and they
will be replaced appropriately
                // you can access the current page and number of pages programmatically by using data.pageNum
and data.numPages respectively
                // this action is invoked for every page on the form
        }
        if (actionName=="footer") {
                // return the footer template string eg "<p>Page ${page} of ${numPages}</p>" or fall thru to use
the value defined in TM
                // you can specify the tokens ${page} and ${numPages} in the template you are returning and they
will be replaced appropriately
                // you can access the current page and number of pages programmatically by using data.pageNum
and data.numPages respectively
                // this action is invoked for every page on the form
        }
        // NOTE: always return the value defined in TM if not explicitly overriden above
        return data.defaultValue; // this is the value from the TM JSON options file
};
```

Here is an example of using a form function to inject the tracking code into the form footer on page 1 for a Composer form. You can for example add this javascript to a composer form by dropping on a "Business Rule [General Purpose]" with the below script content.

```
window.phantomReceiptCallback = function(actionName,data) {
        if (actionName=="footer") {
                if (data.pageNum==1) {
                        var trackingCode = sfc.getPhaseValue("TrackingCode");
                        return "<p class='phantom-footer'>Page ${page} of ${numPages} - "+trackingCode+"</p>";
                }
                return "<p class='phantom-footer'>Page ${page} of ${numPages}</p>";
        }
        // NOTE: always return the value defined in TM if not explicitly overriden above
        return data.defaultValue; // this is the value from the TM JSON options file
};
```

Language Translator in Transact Manager (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

- Create a Form Version Property (Manager v5.1)
- Manage Form Version Properties (Manager v5.1)
- Modify a Form Version Property (Manager v5.1)
- 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

The Transact platform 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.

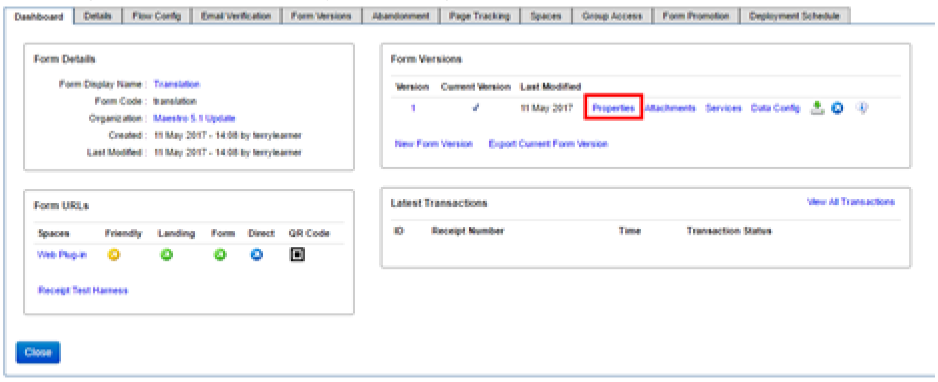
Even though the translation file can be completed outside of Maestro, the form will still need to have some way for the form user to select the different configured languages (eg a Language Selection dropdown menu with the language options configured). For information on how to add the Select Language 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

The steps below document the process of creating a 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 that was created in Maestro.
The Data Type is JSON and the Value is the JSON file.
The screenshot below displays an example of the property details required to create a new form property.

5. Click *Save*

Once the new form property has been created, you can render the form and use the Select Language dropdown to select a lanaguage. Selecting a language will translate the language of the form based on the details in the created JSON file.

Submissions and Operations (Manager v17.10)

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.

The list below identifies the topics covered within this section of the documentation.

- Tracking Submissions (Manager v17.10)
- Data Retention Management (Manager v17.10)
- Form Submission Data (Manager v17.10)
- Saved Transactions (Manager v17.10)
- Abandoned Submissions (Manager v17.10)
- Form Requests Log (Manager v17.10)
- Form Rendering Metrics (Manager v17.10)
- Analytics and Reports (Manager v17.10)

Tracking Submissions (Manager v17.10)

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:

Tracking Submissions

In Transact Manager, one of the most important responsibilities of operations staff 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.

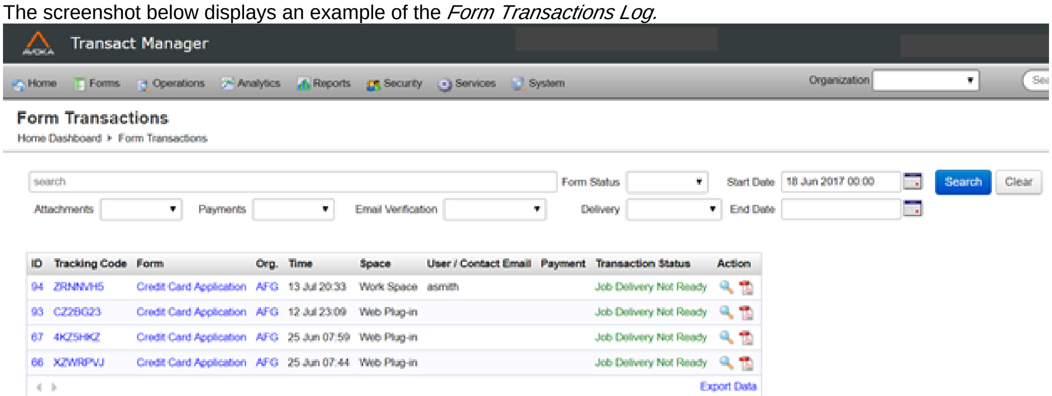
View Form Transactions

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*.



The table below identifies and describes each of the actions that can be available for each transaction in the *Form Transactions Log.*

Icon	Action
	View details Click this icon to view the details of the selected transaction. You may also click on the *ID* or the *Tracking Code.*
	View receipt Click this icon to view the PDF receipt of the selected transaction.
	Retry delivery This icon is made available when delivery of a transaction has not been completed, but submission data is still available. Click this icon to retry delivery of the transaction.
	Retry delivery from scratch

	This icon is made available when delivery of a transaction has not been completed, but submission data is still available. 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.
	**Open Saved Form** 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, *Submission Save Edit.*

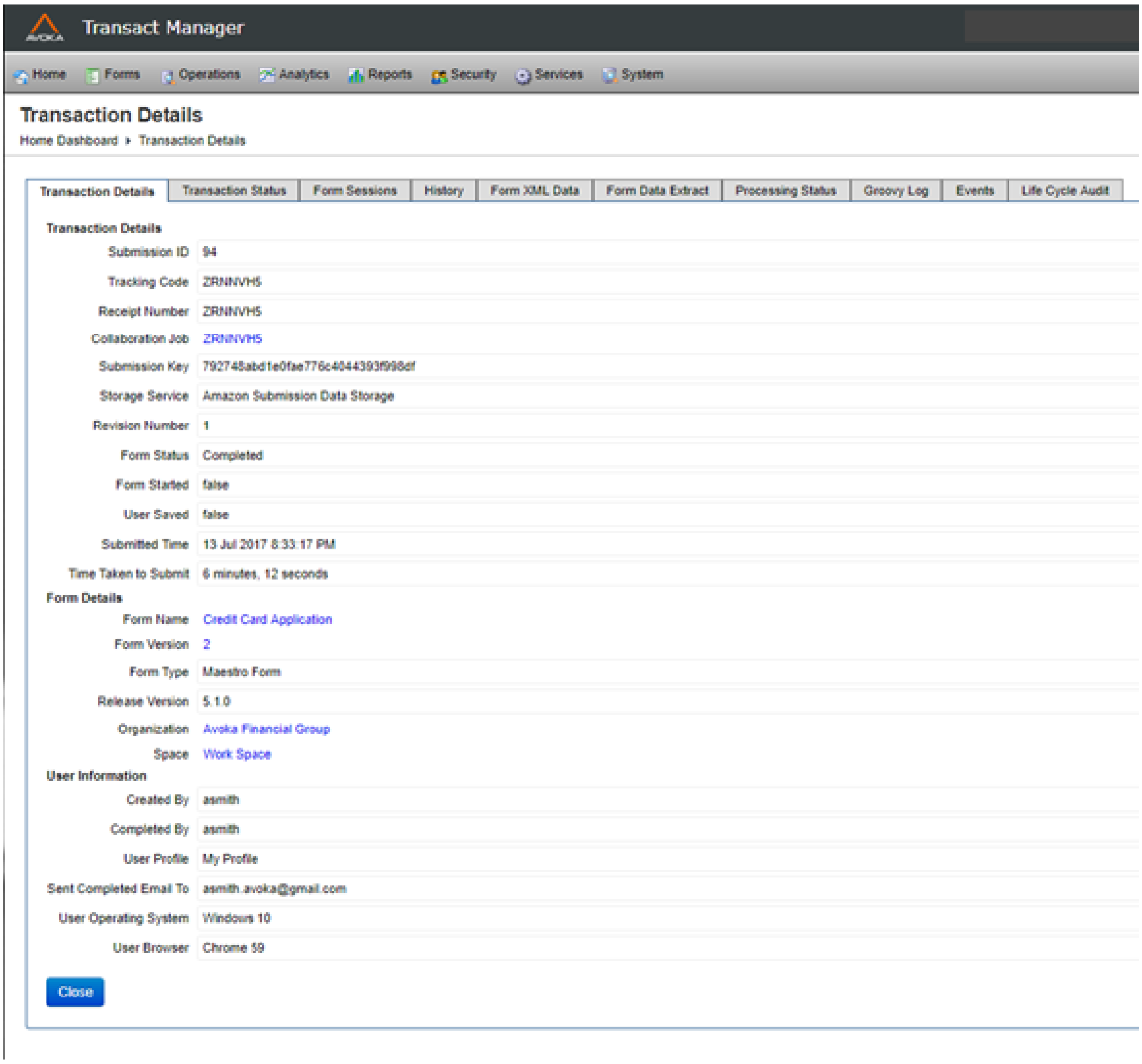
You can filter the log by using the search textbox, or the transaction status dropdown.

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 *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 v17.10)

Unknown macro: 'redirect'

Related Pages:

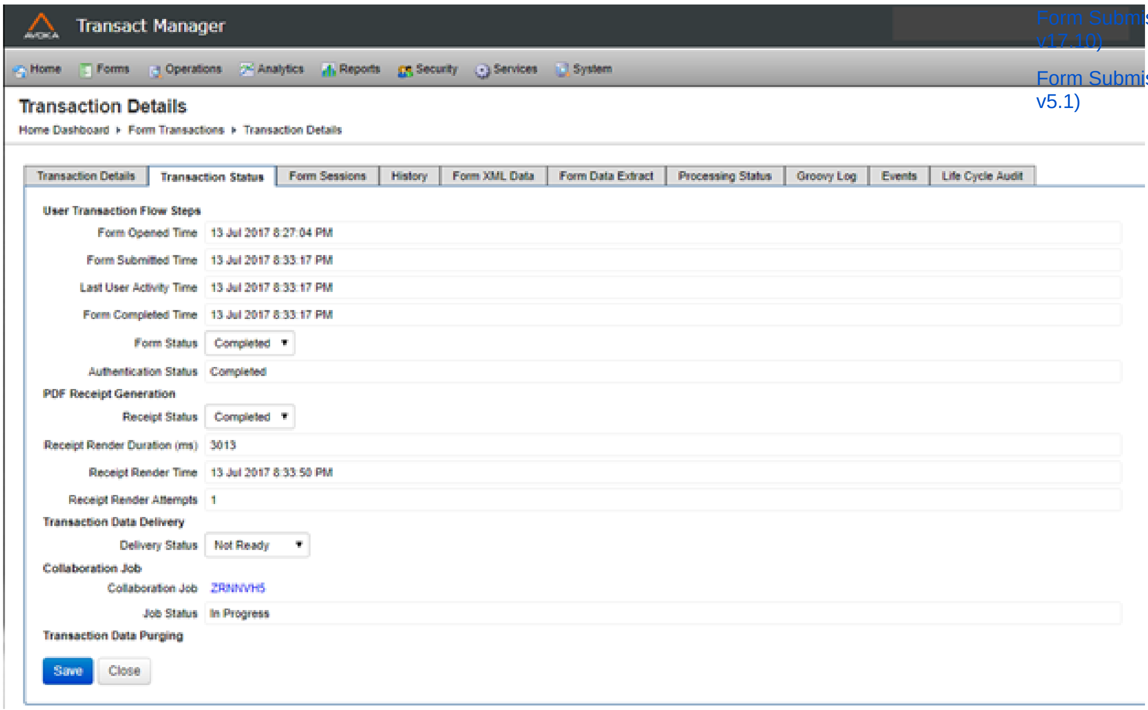
- Form Data Extract (Manager v17.10)
- Form Data Extract (Manager v5.1)
- Form Rendering Metrics (Manager v17.10)
- Form Rendering Metrics (Manager v5.1)
- Form Requests Log (Manager v17.10)
- Form Requests Log (Manager v5.1)
- Form Sessions (Manager v17.10)
- Form Sessions (Manager v5.1)
- Form Submission Data (Manager v17.10)
- Form Submission Data (Manager v5.1)

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.



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 v17.10)

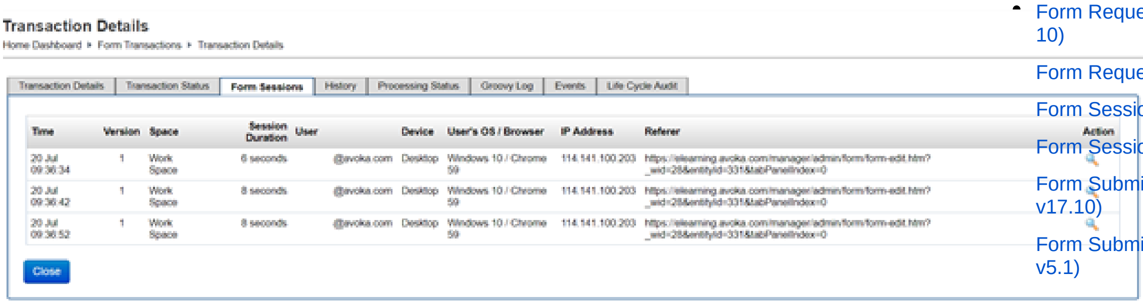
Unknown macro: 'redirect'

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 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.



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 v17.10)

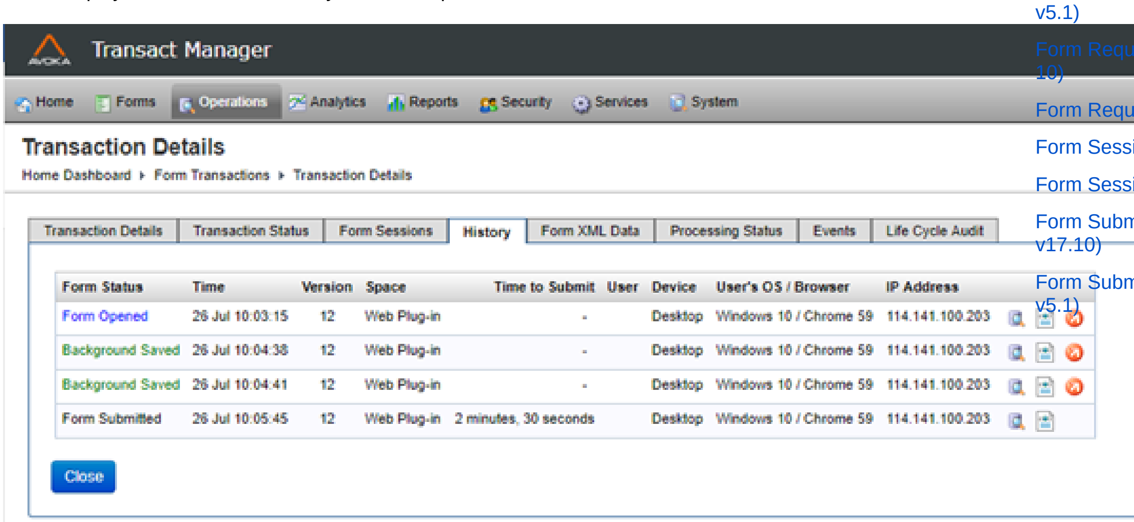
Unknown macro: 'redirect'

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.



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 v17.10)

Unknown macro: 'redirect'

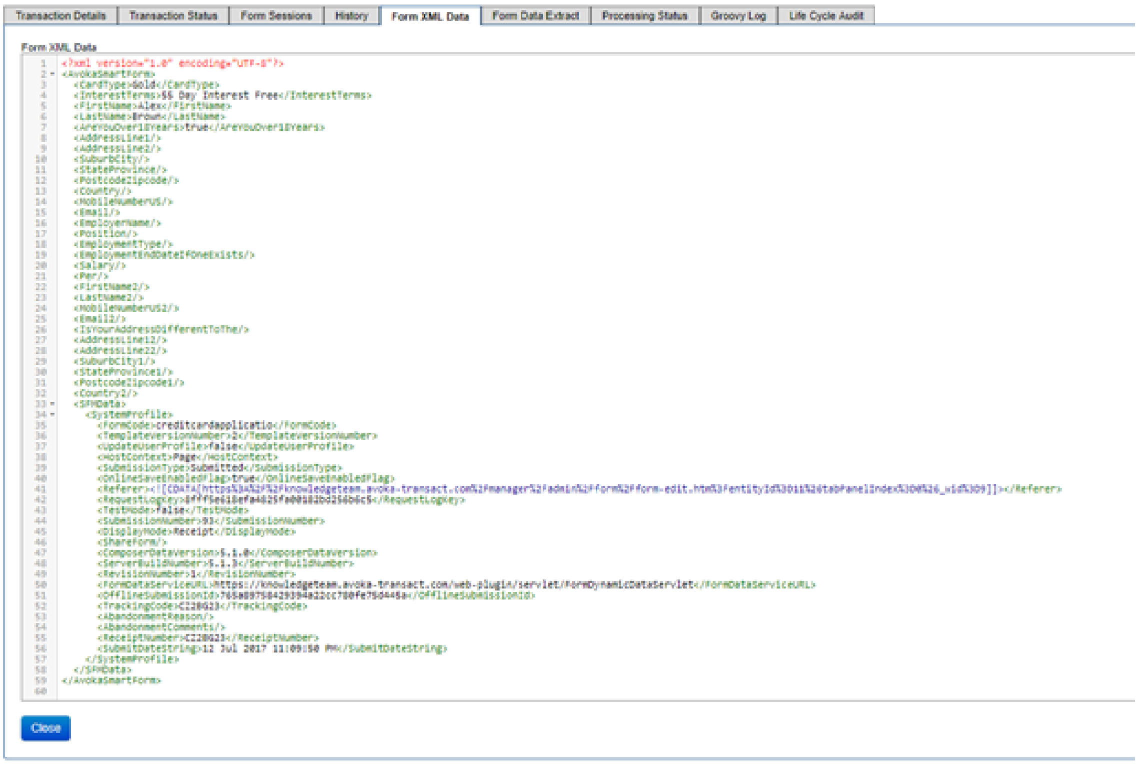
Form XML Data

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.



Related Pages:

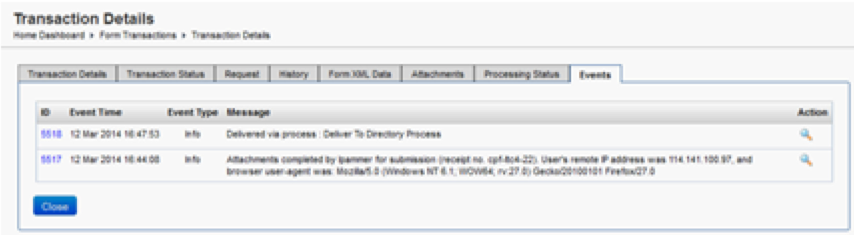
- Form Data Extract (Manager v17.10)
- Form Data Extract (Manager v5.1)
- Form Rendering Metrics (Manager v17.10)
- Form Rendering Metrics (Manager v5.1)
- Form Requests Log (Manager v17.10)
- Form Requests Log (Manager v5.1)
- Form Sessions (Manager v17.10)
- Form Sessions (Manager v5.1)
- Form Submission Data (Manager v17.10)
- Form Submission Data (Manager v5.1)

Submission Events (Manager v17.10)

Unknown macro: 'redirect'

Submission Events

Switching to the *Events* tab will display any events that were logged against the selected transaction. The *E vents* 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.



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)

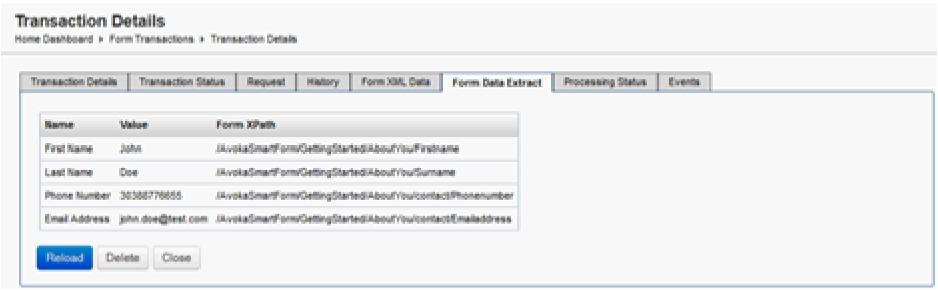
Form Data Extract (Manager v17.10)

Unknown macro: 'redirect'

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 documentation.

The screenshot below displays an example list of extracted values of a transaction.



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)

Data Retention Management (Manager v17.10)

Unknown macro: 'redirect'

The content within this section covers information relating to data retention in Transact Manager.

The list below identifies the topics covered within this section of the documentation.

- Data Retention Management Overview (Manager v17.10)
- Data Retention Policy Mode (Manager v17.10)
- Data Retention Status (Manager v17.10)
- Data Retention Schedule (Manager v17.10)
- Triggering Data Retention (Manager v17.10)
- Form Submission Categories (Manager v17.10)
- Data Retention Management Information (Manager v17.10)

Data Retention Management Overview (Manager v17.10)

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 ***relax ed*** 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 has 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 v17.10)

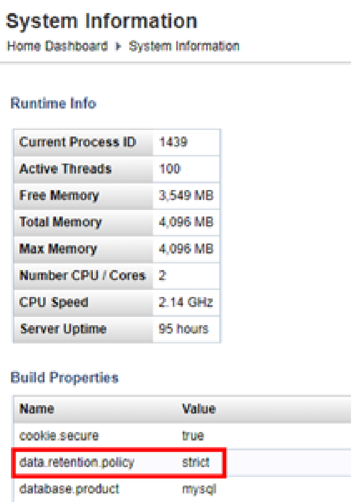
Unknown macro: 'redirect'

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.



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 constrains the potential amount of data retained by TM. Both the ***strict*** mode and the ***relaxed*** mode initially apply the same set of defaults for all of the data retention settings. However, each of these default settings, except for the last two, 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 one or all of the:

- *Data Retention Management* page (globally, found under the *Systems* menu).
- *Data Management* tab (for a specific organization).
- *Details* tab (for a specific form).

The table below outlines the differences between the two data retention policy modes.

	Strict Mode		Relaxed Mode		
	Default	Max	Default	Max	Explanation
Saved Transactions	30 days	180 days	30 days	2 years	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 Abandoned Submissions (Manager v17.10).The TM environment setting is initially set to the *Default*. However, it may be changed to any value that doesn't exceed the *Max*. Organization and form level settings can be used to override the environment settings. However, they cannot exceed the *Max* value (further restrictions may apply).
Finished Transaction PII Data	7 days	30 days	7 days	2 years	This setting determines how long to keep data entered by the user before it is deleted.The TM environment setting is initially set to the *Default*. However, it may be changed to any value that doesn't exceed the *Max*.Organization and form level settings can be used to override the environment settings. However, they cannot exceed the *Max* value (further restrictions may apply).

Related Pages:

Error rendering macro 'contentbylabel'

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

Finished Transactions	90 days	2 years	90 days	5 years	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.The TM environment setting is initially set to the *Default*. However, it may be changed to any value that doesn't exceed the *Max*.Organization and form level settings can be used to override the environment settings. However, they cannot exceed the *Max* value (further restrictions may apply).
Finished Collaboration Jobs	90 days	2 years	90 days	2 years	This setting determines how long to keep finished collaboration jobs before they are deleted. The TM environment setting is initially set to the *Default*. However, it may be changed to any value that doesn't exceed the *Max*.Organization and form level settings can be used to override the environment settings. However, they cannot exceed the *Max* value (further restrictions may apply).
Submission Data Extracts	Same as Finished Transaction PII Data setting (7 days)				This setting determines how long to keep submission data extracts before they are deleted.You cannot override this setting.
Submission Properties	Same as Finished Transaction PII Data setting (7 days)				The setting determines how long to keep submission properties before they are deleted.You cannot override this setting.

Retention Settings Tab (Manager v17.10)

Unknown macro: 'redirect'

Retention Settings Tab

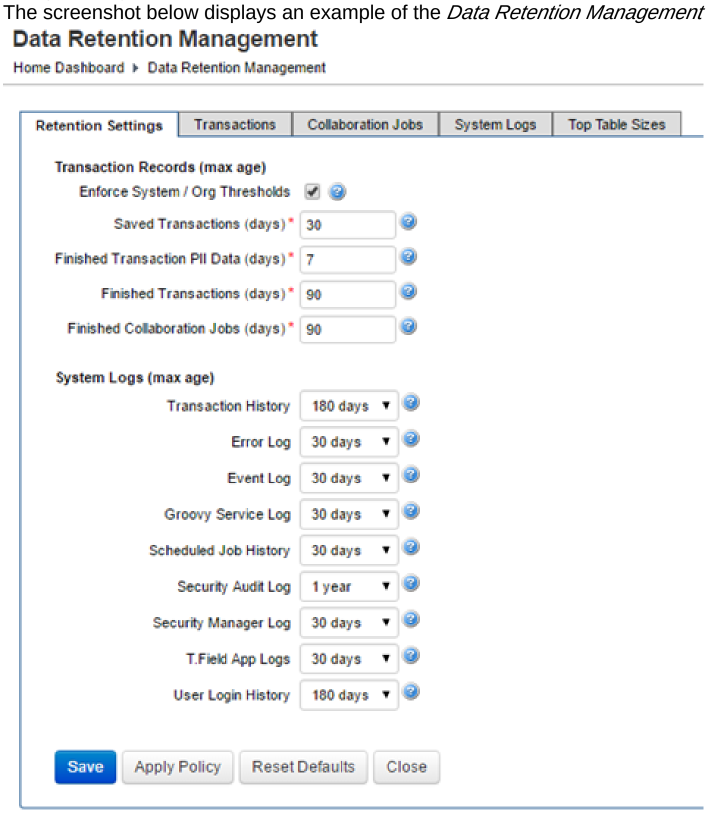
The data retention settings will initially default to your environment’s data retention policy, which is either ***strict*** or ***relaxed***. These data retention settings may be subsequently customized according to your company’s data requirements.

The configuration of the data retention settings is performed using the *Data Retention Management* page in Transact Manager.

The *Data Retention Management* page is restricted to an administrator having the *Service Edit* permission in TM.

To access the *Data Retention Management* page:

1. Navigate to *System* from the TM menu bar, and then click *Data Retention Management* from the dropdown menu.
   The screenshot below displays an example of the *Data Retention Management* page with the *Retention Settings* tab selected.



The *Data Retention Management* page contains the following tabs:

- *Retention Settings* – for customizing your environment’s data retention settings for transaction records and system logs.
- *Transactions* – to view metrics on transactions by form status and delivery status.
- *Collaboration Jobs* – to view metrics on collaboration jobs by job type.
- *System Logs* – to view metrics on the system logs by type of log.
- *Top Table Sizes* – to view metrics on your environment’s largest database tables (only available if your TM instance uses MySQL).

The *Retention Settings* tab is divided into two sections:

- *Transaction Records* – retention settings for transactional data.
- *System Logs* – retention settings for system log data.

Transaction Records Settings

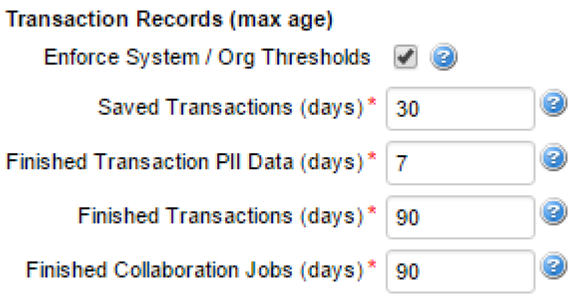
Transaction records are created the moment a user opens a form. The status of the form changes as the user saves, cancels, and submits the form. Each transaction corresponds to the user entered data, and is associated with other details, such as submission history, submission properties, data extracts, and attachments.

In relation to data retention, transactions incur two major concerns:

- Transactions are continually generated and contain a large amount of data. This can lead to large database sizes and degraded performance if data is not purged regularly.
- Transactions contain user-entered personally identifiable information (PII). This can pose a security risk. Whilst TM comes with several data security measures, it is always advisable to ensure that personally identifiable information is purged soon after transactions have finished.

Generally, you want to keep your purge settings strict. Using the ***strict*** mode will ensure that transaction data is purged regularly, maximizing your system’s performance and security. TM supports this approach by a frequent job that checks for and purges any PII data and completed submissions that had been completed more than the maximum age timeframe (according to your data retention management settings). The transactions eligible for deletion are completed transactions (successful submissions) and abandoned transactions. That is, TM must recognize that the transaction is in a finished state.

Now let us look at the set of transaction related data retention settings available via the *Retention Settings* tab.



- The *Enforce System/Org Thresholds* checkbox determines whether to constrain the settings that can be overridden on the organization and/or form level.

  Select the *Enforce System/Org Thresholds* checkbox to prevent setting a more lenient override for a corresponding setting at the organization and /or form level. Furthermore, where there is a stricter corresponding setting at the organization level, you will be prevented from setting a more lenient corresponding override at the form level.

  For example, if the *Enforce System/Org Thresholds* checkbox is ticked and the global *Finished Transaction PII Data* policy is set to 14 days, you cannot enter values greater than 14 days for the *Finished Transaction PII Data* policy on the organization or form level. In addition, if an organization's value of the *Finished Transaction PII Data* policy is 10 days, you cannot configure any of this organization's forms to have a *Finished Transaction PII Data* policy value greater than 10 days.

  Thresholds are only relevant to the *Saved Transactions* and *Finished Transaction PII Data* settings.

> **Note:** Even if *Enforce System/Org Thresholds* is selected, changes to global or organization policies DO NOT affect the values set on lower levels. For example, if an organization has a *Finished Transaction PII Data* policy value of 14 days and you change the global *Finished Transaction PII Data* policy value to 7 days, the organization value will remain the same until the organization settings are edited. This avoids problems around accidental changes to global policies trickling through the entire system.

The following settings will initially be defaulted according to your environment's data retention policy mode, ***strict*** or ***relaxed***. The individual settings may be customized as explained.

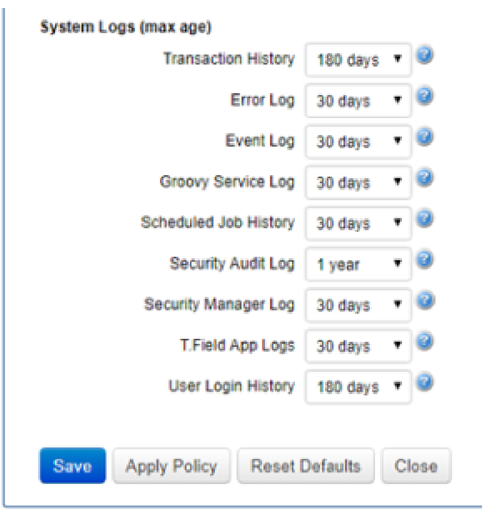
- The ***Saved Transactions*** setting allows you to specify the number of days after which a transaction that was explicitly saved by a user is automatically abandoned by TM. The number of days before abandonment will reset each time the form is saved by the user. This means that the allowable length of time between when the form is first opened and its eventual submission may be extended by the user resuming the form regularly to complete and save the entered data.

  Once a saved transaction is abandoned, it is considered a finished transaction like when a user completes and successfully submits a form. Note that the transaction will not be deleted at this point, but as a finished transaction, the countdown for PII data deletion and submission record deletion starts ticking. This setting can be customized on both the organization and form levels.

  For more information on abandonment see Abandoned Submissions (Manager v17.10).
- The ***Finished Transactions*** setting determines how many days transaction records and any associated details will be kept once a transaction has finished. If PII data has been deleted for a submission, the header records remain until this policy kicks in, allowing administrators to find the submission in the TM logs.
- The ***Finished Collaboration Jobs*** setting determines how many days collaboration jobs and all their submissions will be kept once the entire job has finished.

System Logs Settings

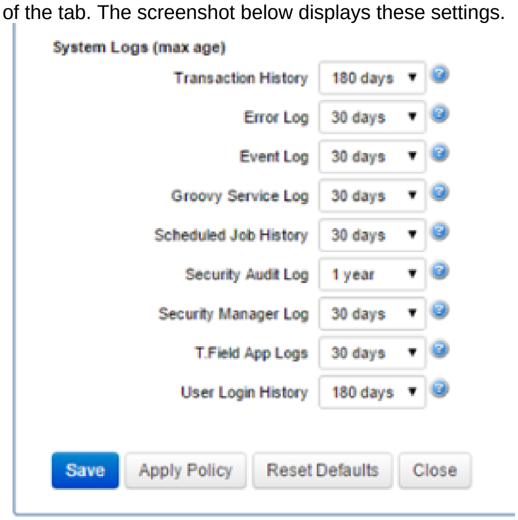
Apart from transaction data, TM provides various system logs. For both ***strict*** and ***relaxed*** mode, the data retention management settings will default as shown in the screenshot below.



To change the system log settings:

1. Navigate to *System* from the TM menu bar, and then click *Data Retention Management* from the dropdown menu.

2. The *Retention Settings* tab should be displayed (if not, switch to this tab). The relevant settings are found in the *System Logs* section at the bottom of the tab. The screenshot below displays these settings.



3. You may select a more suitable value from any of the following dropdowns:
   a. ***Transaction History*** - Whenever a submission is finished, a record containing information about the submission (such as final status, form name, time to submit and browser information) is written to a separate transaction history table. The transaction history table does not contain personally identifiable information, though the contact email address (if defined) is written to the transaction history table for security auditing purposes. The *Transaction History* setting determines how long transaction history records are kept, counting from the time the submission was originally started.
   b. ***Error Log*** - The *Error Log* setting determines how long error log entries and data that are not associated with a submission will be kept, counting from the time that the error occurred.
   c. ***Event Log*** - The *Event Log* setting determines how long event log entries that are not associated with a submission will be kept, counting from the time that the event was logged.
   d. ***Groovy Service Log*** - The *Groovy Service Log* setting determines how long log entries for Groovy service invocations will be kept, counting from invocation time.
   e. ***Security Log Audit*** - The *Security Audit Log* setting determines how long audit log entries are kept, counting from the time the log was created. The audit log can be crucial to tracking down changes made by administrators, so on non-test servers, we recommend that you allow adequate time before purging this log.
   f. ***Schedule Job History*** - TM creates a log entry every time a scheduled job runs. The *Scheduled Job History* setting determines how long TM will keep these history entries.
   g. ***User Login History*** **-** TM logs various events relating to user session (login, logout, session expiry, account lock etc.). The *User Login History* setting determines how long these logs will be kept.
4. Click the *Save* button to save your changes.

5. Click the *Apply Policy* button if you would like to start a purge run straight away.

Organization Level Settings (Manager v17.10)

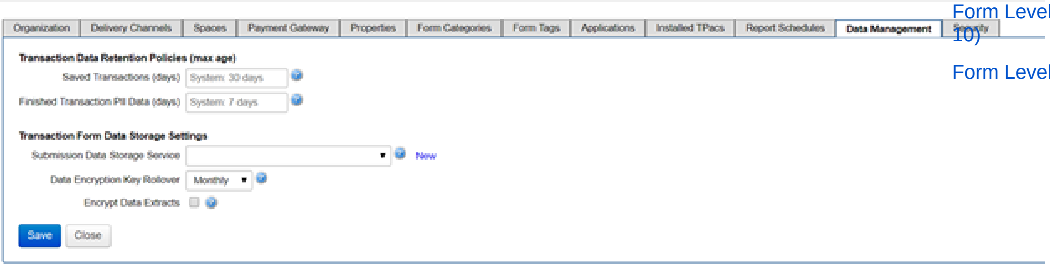
Unknown macro: 'redirect'

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 *Data Management* tab. Notice that for the two fields in the *Data Retention Policies* section, an input prompt is shown. An input prompt is shown only when the *Enforce System/Org Thresholds* checkbox in the *Retention Settings* tab is ticked and no value has been entered for each of these settings.

   From the *Data Management* tab, if you wish to override any of the global *Data Retention Management* settings, enter custom values for:

   - ***Saved Transactions*** – Enter a value which doesn't exceed the global default. In this example, the value must not exceed 30 days.
   - ***Finished Transaction PII Data*** – Enter a value which doesn't exceed the global default. In this example, the value must not exceed 7 days.

   However, when the *Enforce System/Org Thresholds* checkbox in the *Retention Settings* tab is not ticked, no such input prompts are provided and different constraints apply. From the *Data Management* tab, if you wish to override any of the global *Data Retention Management* settings, enter custom values for:

   - ***Saved Transactions*** – Enter a value which doesn't exceed the maximum value for the *Saved Transaction* setting as determined by the data retention management policy. That is, the value cannot exceed 180 days for a strict mode and cannot exceed 730 days (2 years) for a relaxed mode.
   - ***Finished Transaction PII Data*** – Enter a value which doesn't exceed the maximum value for the *Finished Transaction PII Data* setting as determined by the data retention management policy. That is, the value cannot exceed 30 days for a strict mode and cannot exceed 730 days (2 years) for a relaxed mode.
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.

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 (Manager v17.10)

Unknown macro: 'redirect'

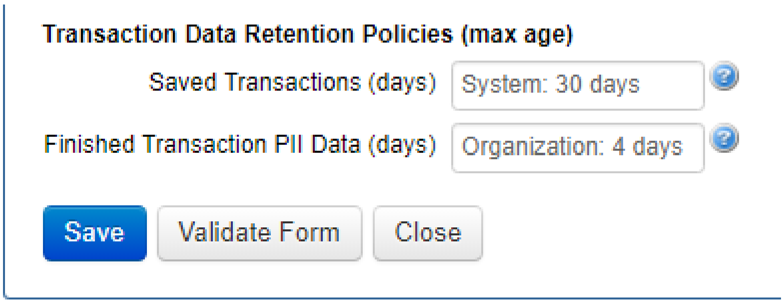
Form Level Settings

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:

1. Navigate to *Forms* from the TM menu bar, and then click *Forms* from the dropdown menu.
2. Find and select the form from the list (either click the edit icon ( ) in the *Action* column or the link in the *FormName* column).
3. 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. Notice that for the two fields in the *Data Retention Policies* section, an input prompt is shown in gray. These represent the active thresholds for each setting. An input prompt is shown only when the *Enforce System/Org Thresholds* checkbox in the *Retention Settings* tab is ticked and no value has been entered for each of these settings.



   From the *Details* tab, if you wish to override the global and/or organization *Data Retention Management* settings:
4. Enter custom values for:
   - ***Saved Transactions*** – Enter a value which doesn't exceed the *Saved Transactions* organization threshold, if one exists at the organization level (from the *Data Management* tab for the related organization), otherwise at the global level (from the *Retention Settings* tab). In this example, the value must not exceed the system active threshold of 30 days. Note this setting can also be configured on the *Abandonment* tab.
   - ***Finished Transaction PII Data*** – Enter a value which doesn't exceed the *Finished Transaction PII Data* organization threshold, if one exists at the organization level (from the *Data Management* tab for the related organization), otherwise at the global level (from the *Retention Settings* tab). In this example, the value must not exceed the organization active threshold of 4 days.

   However, when the *Enforce System/Org Thresholds* checkbox in the *Retention Settings* tab is not ticked, no such input prompts are provided and different constraints apply. From the *Details* tab, if you wish to override the global and/or organization *Data Retention Management* settings, enter custom values for:

   - ***Saved Transactions*** – Enter a value which doesn't exceed the maximum value for the *Saved Transaction* setting as determined by the data retention management policy. That is, the value cannot exceed 180 days for a strict mode and cannot exceed 730 days (2 years) for a relaxed mode.
   - ***Finished Transaction PII Data*** – Enter a value which doesn't exceed the maximum value for the *Finished Transaction PII Data* setting as determined by the data retention management policy. That is, the value cannot exceed 30 days for a strict mode and cannot exceed 730 days (2 years) for a relaxed mode.
5. Click the *Save* button to save your changes. Once you have saved your changes, this form will use these new override data retention settings instead of the global and/or organization corresponding settings.

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 Best Practices (Manager v17.10)

Unknown macro: 'redirect'

Data Retention Policy Best Practices

Data Retention Management Considerations

A data retention policy needs to consider such requirements as:

- Optimal conversion rate – a user must have adequate time to return to and complete a transaction.
- System efficiency – a lean database is preferable for a more responsive system.
- Privacy – Personally Identifiable Information (PII) data need only be retained for the shortest possible time to minimize any potential security risks.

The Avoka Transact platform is intended to be a system of engagement rather than to be a system of record. You may have noticed that over time both the ***re laxed*** and ***strict*** data retention policies have been shortened.

Within Transact Manager, data is best kept only for as long as it is required within the transaction lifecycle. It is recommended to configure Transact Manager to the strictest possible data retention management policy. Otherwise, this contributes to extra-large data base sizes and potential problems during any recurring upgrade processes.

However, we understand that it often is a balancing act between maintaining a lean, well performing and responsive system whilst also allowing an adequate timeframe for your users to return to and complete their forms. That is, in Transact Manager, incomplete transactions are automatically abandoned after sufficient time has been offered to users to return.

In addition, PII data is automatically purged from the transactions very soon after the user has submitted their form to minimize any potential security risk.

For more information on the Data Retention Policy settings please see the Data Retention Policy Mode section.

Strict Data Retention Policy - Recommended

When first installing or upgrading a TM instance, a choice must be made between having a ***strict*** or a ***relaxed*** data retention policy. For this, we strongly recommend selecting the ***strict*** data retention policy for your production TM instance. To better understand the difference between ***strict*** and ***relaxed*** please see the table found in the Data Retention Policy Mode section.

Data Retention Status (Manager v17.10)

Unknown macro: 'redirect'

Data Retention Status

To help decide on data retention settings or see how they are working out, it is useful to first see how much data is currently stored on the TM server. For your convenience, TM provides summaries on the data retention management page.

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 Schedule (Manager v17.10)

Unknown macro: 'redirect'

Data Retention Schedule

TM out of the box has already included a mechanism for processing transactions and managing data retention. This is, the *Transaction Processing* job which runs continuously in the background, by default, every 5 minutes. For this, it executes the *Transaction Processor* and the *Data Retention Management* service. This helps keep data from accumulating. The *Transaction Processing* job also 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 customize such settings as the maximum number of records purged each time it runs or the maximum number of records purged each run. Information about how to customize these settings is located in the *Transaction Processor Service (Manager v17.10)* and the *Data Retention Management Service sections.*

The Transaction Processing Job

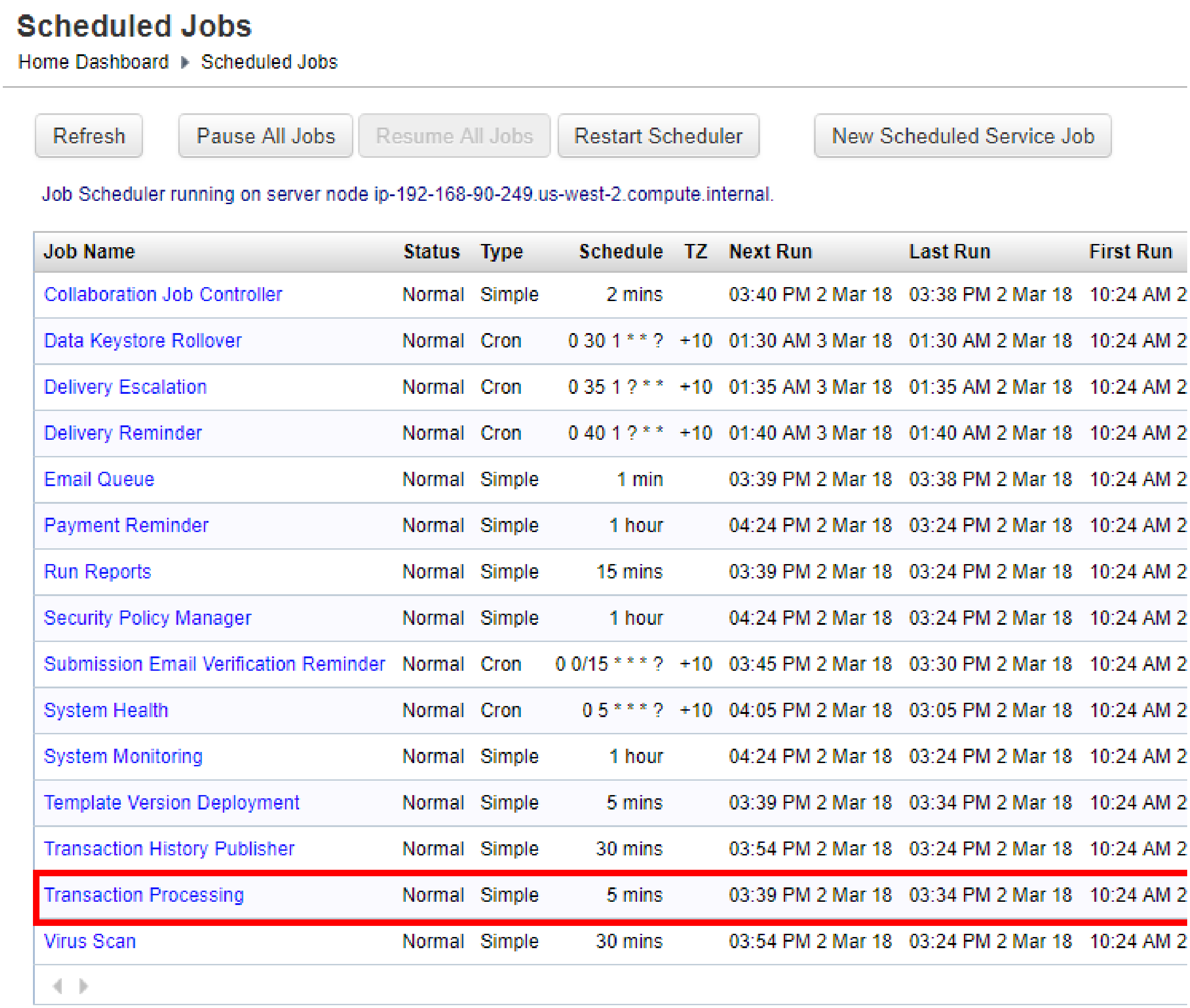
The *Transaction Processing* job performs data purging as one part of it's processing, the *Transaction Processor* service. That is, the *Transaction Processing* job processes important steps in the transaction lifecycle such as performing:

- Delivery
- Task expiry
- Abandonment
- Data purging

View the Transaction Processing Job

To view the *Transaction Processing* job as part of the scheduled jobs:

1. Navigate to *System* from the menu bar, and then click *Scheduled Jobs* from the dropdown menu.
   The screenshot below is an example display of a list of scheduled jobs that exist in an instance of Transact Manager.



Job Name	Status	Type	Schedule	TZ	Next Run	Last Run	First Run
Collaboration Job Controller	Normal	Simple	2 mins		03:40 PM 2 Mar 18	03:38 PM 2 Mar 18	10:24 AM 2
Data Keystore Rollover	Normal	Cron	0 30 1 * * ?	+10	01:30 AM 3 Mar 18	01:30 AM 2 Mar 18	10:24 AM 2
Delivery Escalation	Normal	Cron	0 35 1 ? * *	+10	01:35 AM 3 Mar 18	01:35 AM 2 Mar 18	10:24 AM 2
Delivery Reminder	Normal	Cron	0 40 1 ? * *	+10	01:40 AM 3 Mar 18	01:40 AM 2 Mar 18	10:24 AM 2
Email Queue	Normal	Simple	1 min		03:39 PM 2 Mar 18	03:38 PM 2 Mar 18	10:24 AM 2
Payment Reminder	Normal	Simple	1 hour		04:24 PM 2 Mar 18	03:24 PM 2 Mar 18	10:24 AM 2
Run Reports	Normal	Simple	15 mins		03:39 PM 2 Mar 18	03:24 PM 2 Mar 18	10:24 AM 2
Security Policy Manager	Normal	Simple	1 hour		04:24 PM 2 Mar 18	03:24 PM 2 Mar 18	10:24 AM 2
Submission Email Verification Reminder	Normal	Cron	0 0/15 * * * ?	+10	03:45 PM 2 Mar 18	03:30 PM 2 Mar 18	10:24 AM 2
System Health	Normal	Cron	0 5 * * * ?	+10	04:05 PM 2 Mar 18	03:05 PM 2 Mar 18	10:24 AM 2
System Monitoring	Normal	Simple	1 hour		04:24 PM 2 Mar 18	03:24 PM 2 Mar 18	10:24 AM 2
Template Version Deployment	Normal	Simple	5 mins		03:39 PM 2 Mar 18	03:34 PM 2 Mar 18	10:24 AM 2
Transaction History Publisher	Normal	Simple	30 mins		03:54 PM 2 Mar 18	03:24 PM 2 Mar 18	10:24 AM 2
Transaction Processing	Normal	Simple	5 mins		03:39 PM 2 Mar 18	03:34 PM 2 Mar 18	10:24 AM 2
Virus Scan	Normal	Simple	30 mins		03:54 PM 2 Mar 18	03:24 PM 2 Mar 18	10:24 AM 2

All scheduled jobs are listed with the following details:

Job Name represents name of this job.

Status represents the status of this job.

Type represents job type of this job.

Schedule represents when this job is scheduled to run.

TZ represents the timezone (relevant for *Cron* jobs).

Next Run represents the time that this job will run next.

Last Run represents the time that this job was last run.

First Run represents tthe time that this job was first run.

Action represents a set of action icons available to operations.

Icon	Action
	View and/or Edit Job (same as clicking on the link in the *Job Name* column)
	Delete Job (proceed with care as it is not advisable to delete a job). It is only in extremely rare circumstances that you may need to delete a scheduled job.
	Pause Job to pause the job (only if required temporarily).
	Trigger Job to trigger the job to run immediately.

The *Transaction Processing* job is highlighted above. From the details shown it's a simple job meaning that it is executing continually every 5 minutes. At the time this screenshot was taken it was due to run next at 3:39PM on 2 Mar 2018 and it last run 5 minutes before. We can also tell that this job was first run on 2 Jun 2017 at 10:24AM.

View Data Retention Audit

Audit information for data retention management can be viewed from the *Event Log* in TM. For more information refer to Event Log (Manager v17.10) section.

The following two screenshots display audit details for the execution of the Transaction Processor and the Data Retention Management services respectively.

Event Log

Home Dashboard ▸ Event Log

ID	18905
Event Time	Wed Apr 11 14:16:13 AEST 2018
Event Type	Info

Message

```
Data Retention Management applied, 1 records deleted in 198 ms.

"Table","Rows","Time (ms)","Percentage"
"Delete Submission Data",0,36,18.3
"Job",0,1,0.5
"Submission",1,145,73.6
"Transaction History",0,2,1.0
"Audit Log",0,1,0.5
"User Auth Event",0,2,1.0
"Groovy Service Log",0,1,0.5
"Offline Client System Log",0,1,0.5
"Offline Sync Call",0,1,0.5
"Offline Sync Log",0,1,0.5
"Scheduled Job History",0,1,0.5
"Security Manager Log",0,1,0.5
"Email Queue",0,2,1.0
"Composer Package Queue",0,1,0.5
"Import Action",0,1,0.5
```

Close

Triggering Data Retention (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

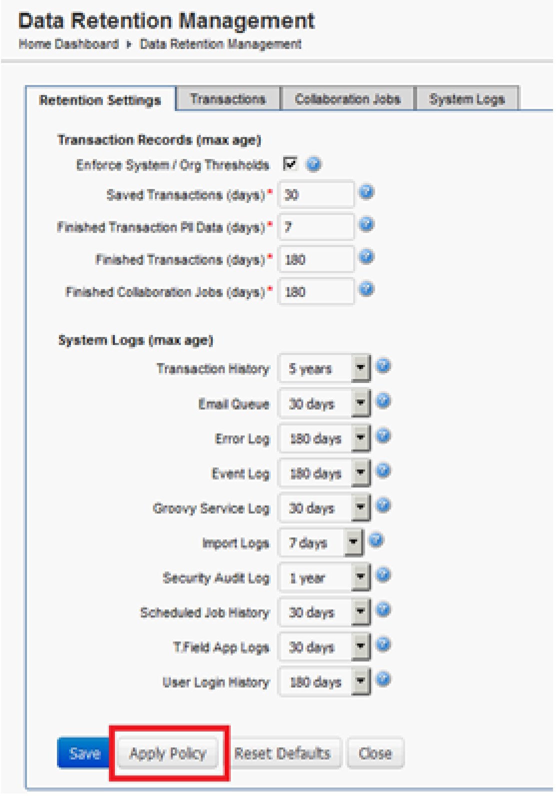
- Data Retention Management Overview (Manager v17.10)
- Data Retention Management Overview (Manager v5.1)
- Data Retention Policy Mode (Manager v17.10)
- Data Retention Policy Mode (Manager v5.1)
- Data Retention Schedule (Manager v17.10)
- Data Retention Schedule (Manager v5.1)
- Data Retention Status (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).



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 v17.10)

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 them into the context of the transaction life cycle. There are three distinct categories a transaction can fall into when considering data retention:

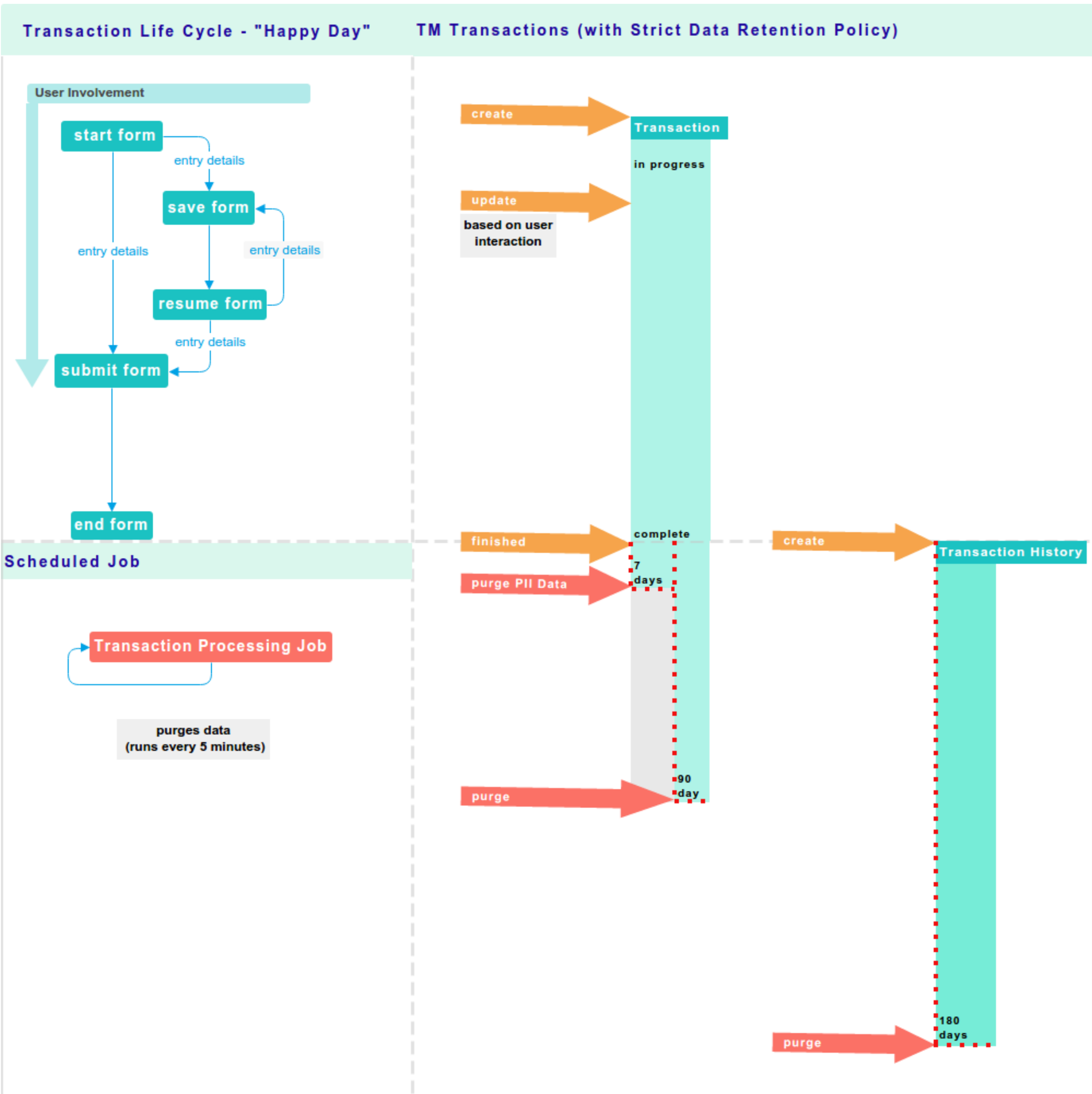
1. Completed Transactions (not part of a collaboration job)
2. Abandoned Transactions (not part of a collaboration job)
3. Collaboration Job

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)

The image below illustrates 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 that is established by the *Saved Transaction* data retention setting (30 days for strict policy).



The following steps decribe the process illustrated 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 needed. Each time the user resumes and saves the form, the timeframe allowed, configured by 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, the transaction 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. Removing the PII data for a brief time (7 days for strict policy) after a transaction has been completed, 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.

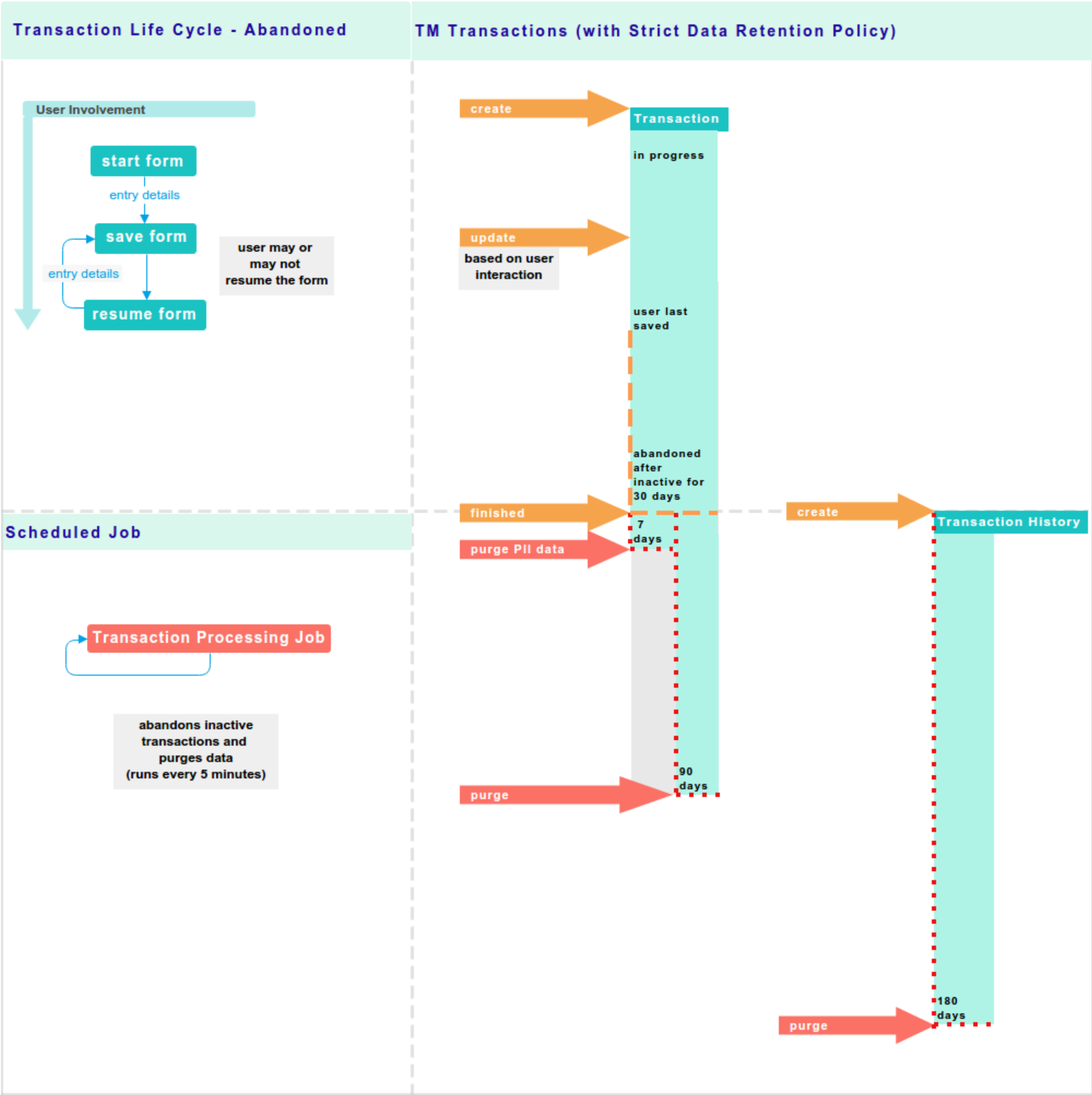
Abandoned Transactions (not part of a collaboration job)

There are many ways that a transaction may be abandoned. The list below identifies and describes several of the ways that a transaction may be abandoned.

- Explicitly by the user clicking the *Cancel* button or closing the browser 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 saves or submits, 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:
    - 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.

the image below illustrates 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 list describes the process illustrated 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.

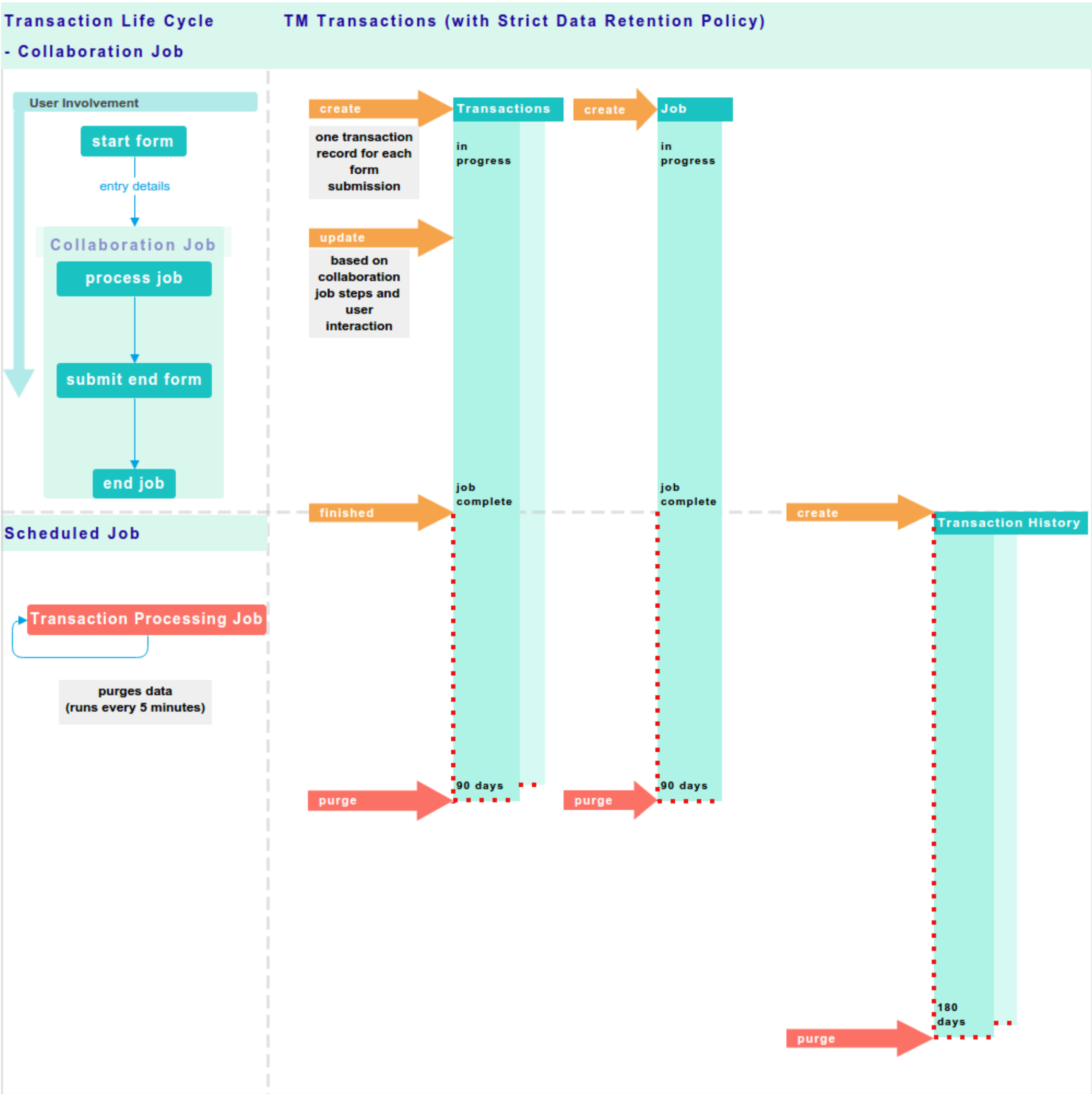
In most cases, abandoned transactions are deleted according to the *Finished Transactions* setting. The only exception is where a user opens the form and leaves it open without having saved it (this includes any background saving). In this case, the transaction is automatically abandoned one day after first opened and then it's deleted 2 days after being abandoned.

Data for abandoned submissions is 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.

The image below illustrates the transaction life cycle for a collaboration job form submission that has been successfully completed.



The list below describes the process illustrated 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.

Data Retention Management Information (Manager v17.10)

Unknown macro: 'redirect'

TM provides information that is helpful for data retention management, such as:

- The status of any individual transaction to assist in keeping track of such things as:
  - Whether the PII data has been purged, and if not, when it is due for purging.
  - When the whole transaction record is due to be purged.

  This information displays for each transaction from the *Transaction Data Purging* section in the *Transaction Status* tab, when viewing the *Transaction Details* page from many of the *Operations* menu options.

- The overall status of data retention is presented as statistical information under each of the *Transactions* tab and the *Collaboration Jobs* tab from the *Data Retention Management* option of the *System* menu.

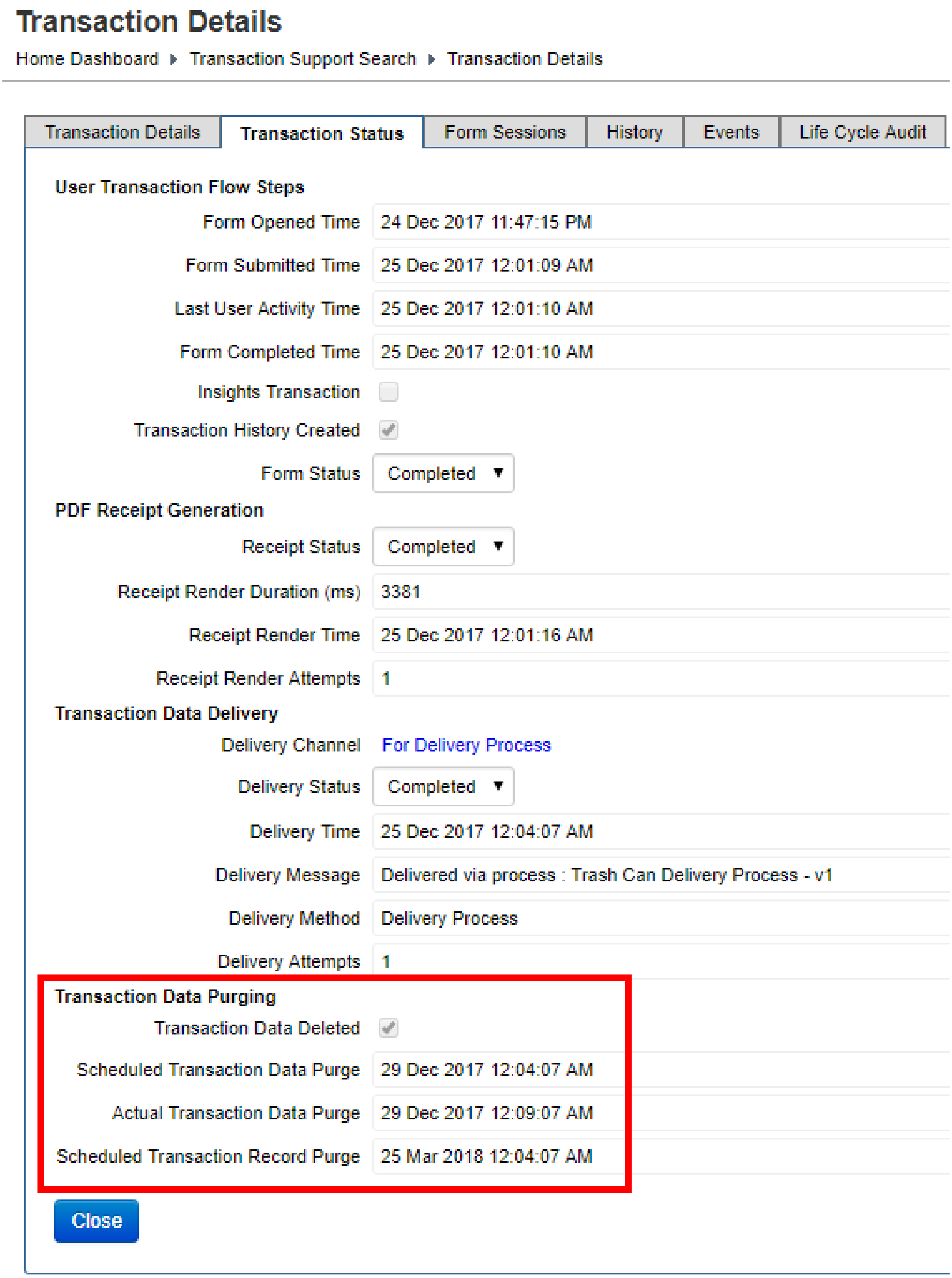
  This information is useful for monitoring the overall performance of the data retention management and assists in diagnosing and tuning of any data retention management issues.

Identifying When a Transaction Will Be Purged

The *Transaction Details* page is useful for monitoring transactions. More specific data retention details can be found by switching to the *Transaction Status* tab.

Let's look at an example of a transaction as shown in the screenshot below that displays the *Transaction Data Purging* section. This includes details about the data retention stage reached in the lifecycle of this transaction. For instance, from this transaction data purging details we can tell that the PII data was purged (as indicated by *Transaction Data Deleted* being ticked) a few minutes after it had been scheduled to be purged (as indicated by *Actual Transaction Data Purge* and *Scheduled Transaction Data Purge*). Also, the transaction data record is due to be deleted on the 25 March 2018 (as indicated by *Scheduled Transaction Record Purge*).

Please note that after the 25 March this transaction along with its submission details will no longer exist. Only a transaction history record remains containing some details about the transaction.



Data Retention Management Status Information

From the *Data Retention Management* option from the *System* menu, status information can be found by switching to the following tabs:

- Transactions
- Collaboration Jobs
- System Logs
- Top Table Sizes

Please refer to the Data Retention Status (Manager v17.10) section for more information.

Form Submission Data (Manager v17.10)

Unknown macro: 'redirect'

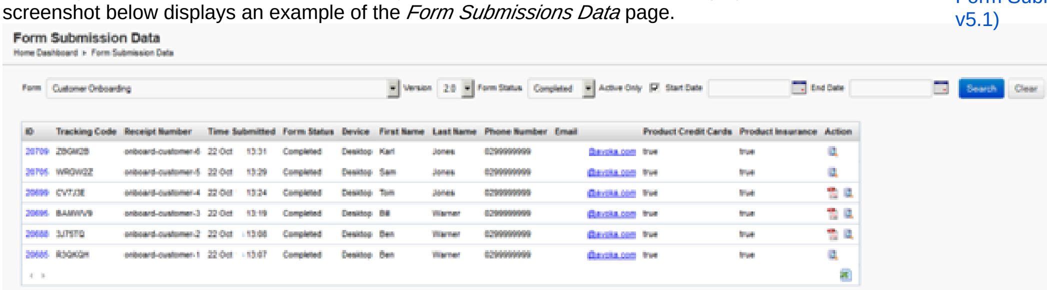
Form Submission Data

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.



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 (Manager v17.10)

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

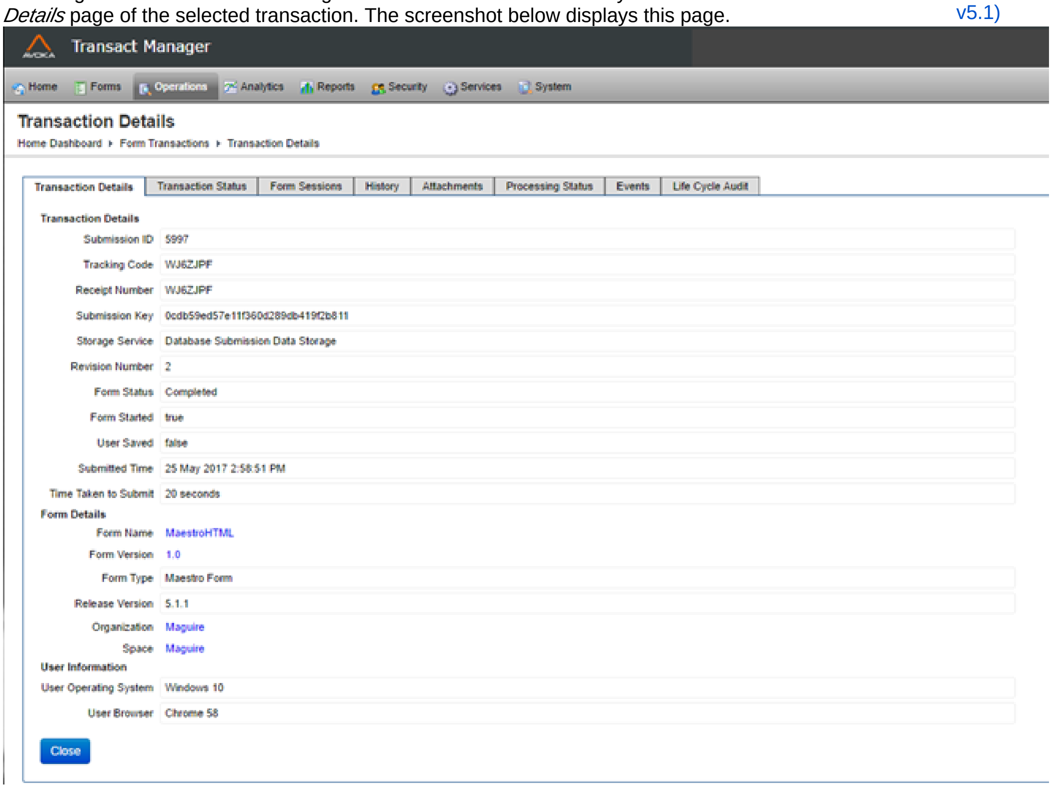
Once a form and its attachments have been submitted by an end-user, Transact Manager allows you to view the attachments to ensure that they are appropriate for what the form requires.

To view submitted attachments associated with a transaction:

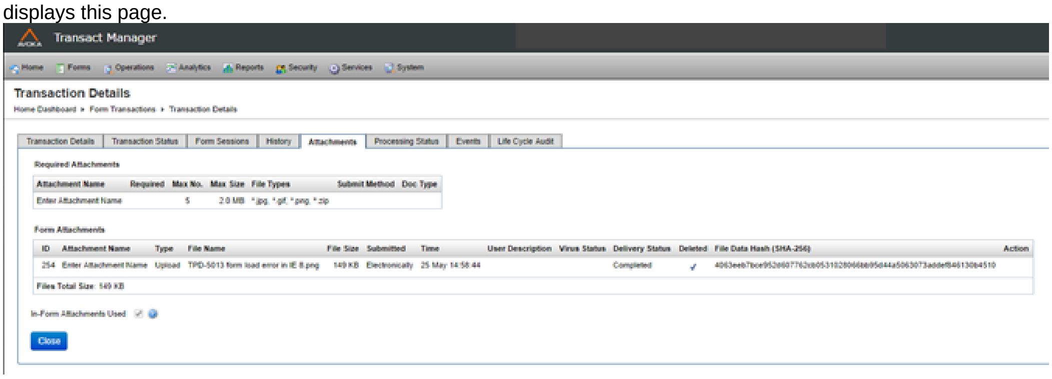
1. Select *Operations* from the menu bar.
   Selecting this option will display the *Operations Menu.*

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.



4. Switch to the *Attachments* tab.
   Switching to this tab will direct you to the *Attachment Details* page. The screenshot below displays this page.



   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 v17.10)

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)

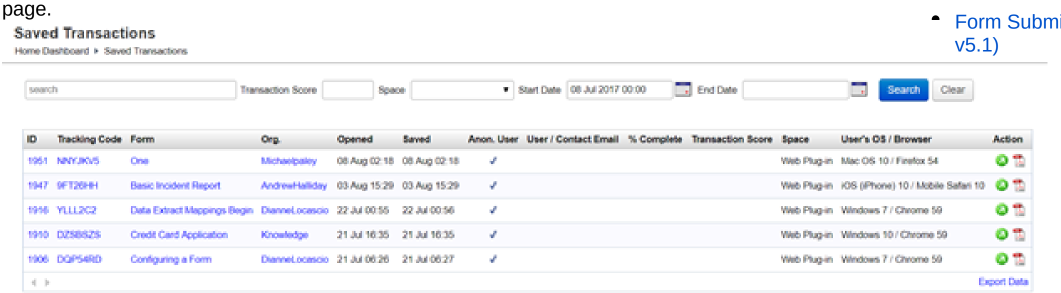
Saved Transactions

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.



The table below identifies and describes the options that are available for selection for each saved transaction.

Icon	Action
	View receipt Click this icon to view the PDF receipt of the selected transaction.
	Open Saved Form 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, *Submission Save Edit*.

You can filter the list of *Saved Transactions* by *Space* or a Date (combination of *Start Date* and/or *End Date)*.

Abandoned Submissions (Manager v17.10)

Unknown macro: 'redirect'

The content within this section covers information relating to abandoned submissions in Transact Manager.

The list below identifies the topics covered within this section.

- Abandoned Submissions Overview (Manager v17.10)
- View Abandoned Submissions (Manager v17.10)
- Configure Form Abandonment Settings (Manager v17.10)
- Manually Abandon Transaction (Manager v17.10)
- Change Form from Abandoned to Saved (Manager v17.10)

Abandoned Submissions Overview (Manager v17.10)

Unknown macro: 'redirect'

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 becoming abandoned. Some examples of how transactions become 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 (eg 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 then eligible to be purged.

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)

View Abandoned Submissions (Manager v17.10)

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. The abandoned transactions list allows TM administrators to make abandoned transactions into saved ones. The following information is displayed for each abandoned transaction in the abadnoned transactions list.

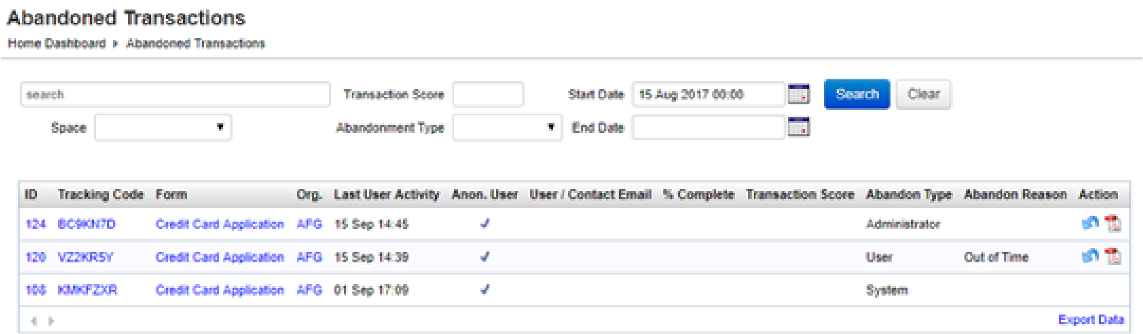
- The Transaction *ID*
- The *Tracking Code*
- The Name of the form
- The Organization associated with the form
- The time and date of the user's last activity with the transaction
- The name of the user/contact email of the user
- The identification if the form user is anonymous (represented by a tick ( )
- 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, or by administrators updating the transaction status to abandoned or 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*



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 has manually updated the form status to *Abandoned*. See the *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 v17.10)

Unknown macro: 'redirect'

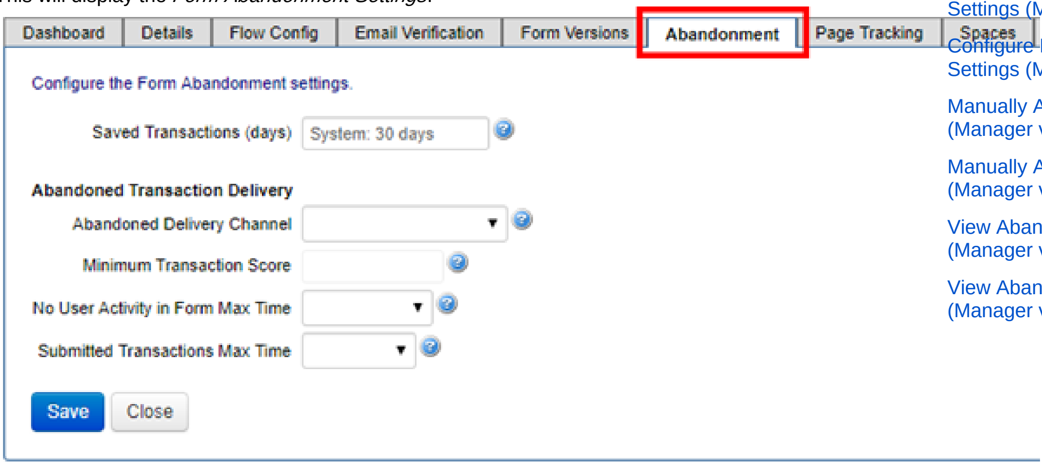
Related Pages:

- 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:

1. Navigate to the Form Dashboard
   This can be done through the Forms menu, or from the recent forms list on the Home Dashboard.
2. Switch to the *Abandonment* tab
   This will display the *Form Abandonment Settings*.



The list below explains each of the Abandonment settings that can be configured from the *Abandonment* ta b.

- *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 it was last saved.
- *Abandoned Delivery Channel* – This dropdown menu 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 menu allows you to 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 menu, you can select the maximum age before a submitted but incomplete (missing attachments) transaction will be marked as abandoned.

Manually Abandon Transaction (Manager v17.10)

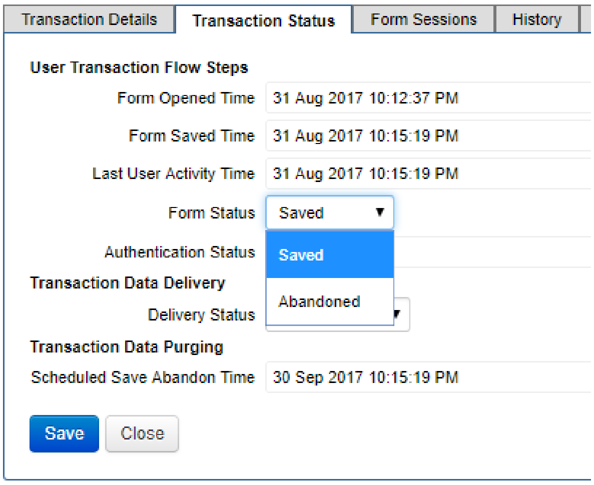
Unknown macro: 'redirect'

Manually Abandon Transaction

A TM administrator may need to manually abandon a form transaction. Even though transaction abandonment is generally handled by TM, there may be times where 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 the 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



4. Click the *Save* button to keep your changes
   The transaction will now be moved to the *Abandon Transactions* list.

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 (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

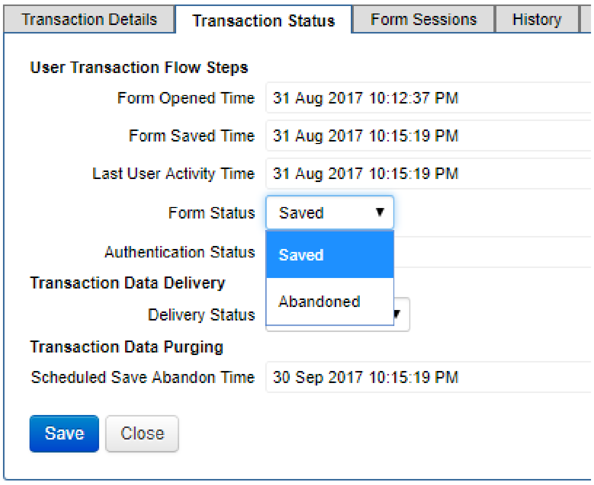
- Abandoned Submissions Overview (Manager v17.10)
- Abandoned Submissions Overview (Manager v5.1)
- Change Form from Abandoned to Saved (Manager v17.10)
- Change Form from Abandoned to Saved (Manager v5.1)
- Configure Form Abandonment Settings (Manager v17.10)
- Configure Form Abandonment Settings (Manager 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:

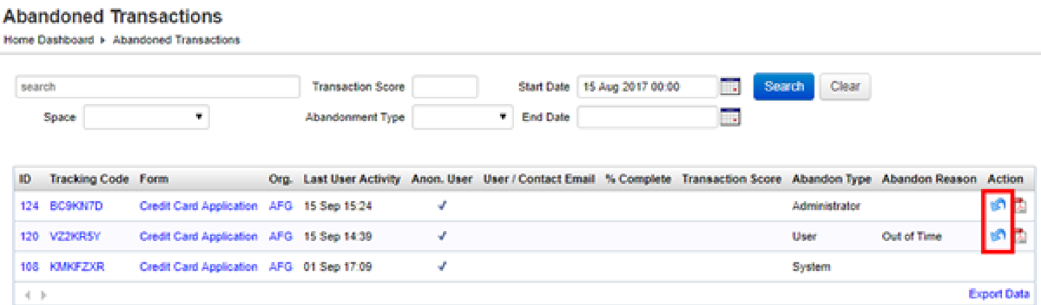
1. Navigate to the *Transaction Details* screen for the transaction you want to abandon.
   This can be done in one of the following ways:
   a. *Operations* > *Form Transactions* > Select the *ID* or *Tracking Code*
   b. *Operations* > *Abandoned Transactions* > Select the *ID* or *Tracking Code*
   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



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.



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 v17.10)

Unknown macro: 'redirect'

Page Contents:

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.

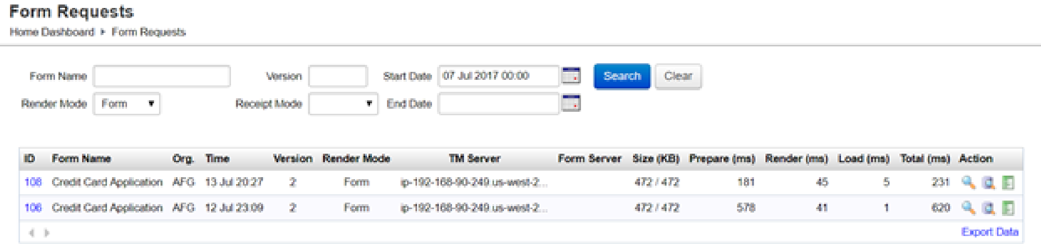
- The Transaction Request ID
- The Name of the form
- The organization associated with the form
- The time that the request was made
- The render mode – Either Form or Receipt. The render mode refers to the task that was requested by the user (either a form request or receipt request)
- The size of the 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.*



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 *View* icon will direct you to the *Form Request Details* page and display additional details pertaining to the selected request. This page documents the *Request Key* of the selected transaction. The *Request Key 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 *View Submission Details* icon will direct you to the *Transaction Details* page. This is the related submission of this form request.

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)

	Clicking the *View Form Details* page will direct you to the Dashboard of the form associated with the selected transaction.

Form Rendering Metrics (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

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 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 Rending Metrics* table displays the following metric information.

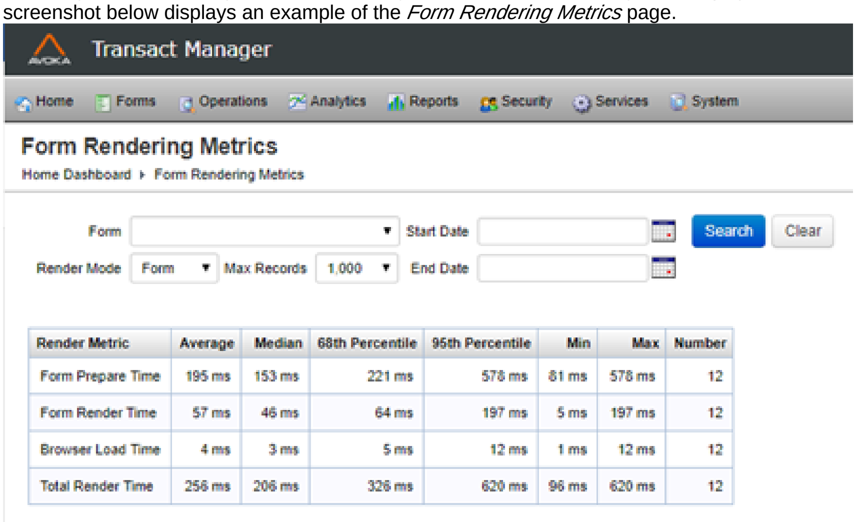
- Render Metric – The following are the metrics that are measured and displayed in this table.
    - Form Prepare Time – This metric is based on the amount of time it takes to prepare the render request.
    - Form Render Time – This metric is based on the amount of time it takes to render the form request 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.



Each column (except for *Number*) of the Form Rendering Metrics tab is measured in milliseconds (ms).

Analytics and Reports (Manager v17.10)

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 covered within this section.

Charts and Analytics (Manager v17.10)

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.

The list below identifies the topics covered within this section.

- Transaction Trend Charts (Manager v17.10)
- The Submission Trend Chart (Manager v17.10)
- The Referer Submissions Pie Chart (Manager v17.10)
- The Browser Submissions Pie Chart (Manager v17.10)
- The Operating System Submissions Pie Chart (Manager v17.10)
- Forms Activity Chart (Manager v17.10)
- Form Submissions Pie Chart (Manager v17.10)

Avoka Transact Reporting Options

The video provides an overview of the reporting options that are available in Transact Manager.

Avoka Transact Reporting Options from Avoka on Vimeo.

Transaction Trend Charts (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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:

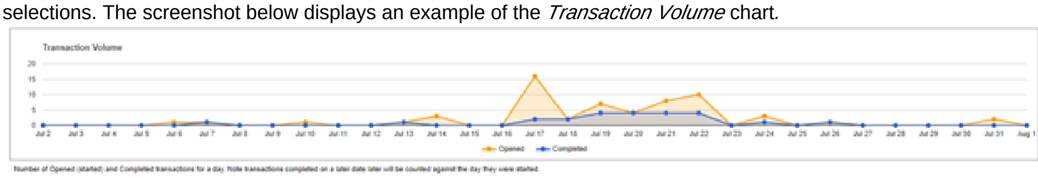
1. Navigate to *Analytics* from the menu bar.
   Navigating to *Analytics* will display the Analytic*s* menu.

2. Select *Transaction Trend* from the *Analytics* menu.
   The screenshots below display examples of the *Transaction Trend* charts.

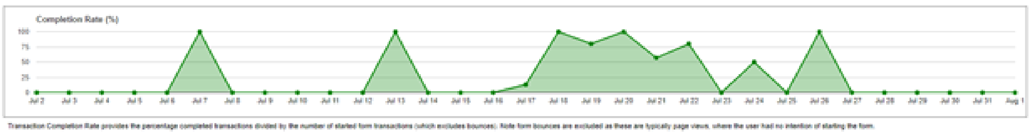
All charts on the *Transaction Trend* charts page plot a daily value on the x-axis. When the selected date range, screen size, and resolution tries to accommodate too many days (daily values) for the screen display, the x-axis will display as if it is plotted for every two or more days (depending on 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.

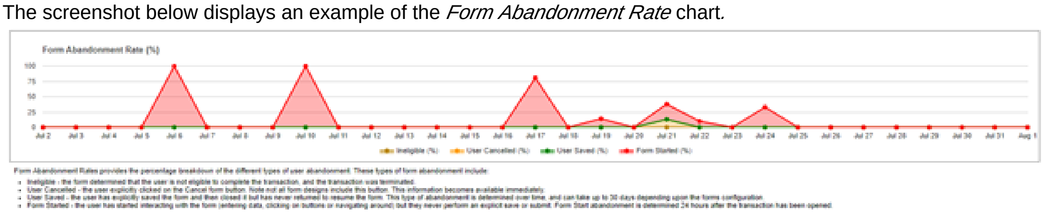


- *Completion Rate (%)* – This chart displays the daily percentage rate of all transactions that were completed during the selected date range based on filter selections. The screenshot below displays an example of the *Completion Rate (%)* chart.

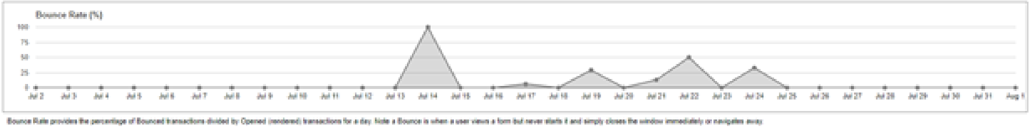


- *Form Abandonment Rate(%)* – This chart displays the daily percentage of all transactions that were opened and then abandoned (never completed or submitted) by form users during the selected date range based on filter selections. The graph shows the abandonment rates plotted individually as a percentage 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.

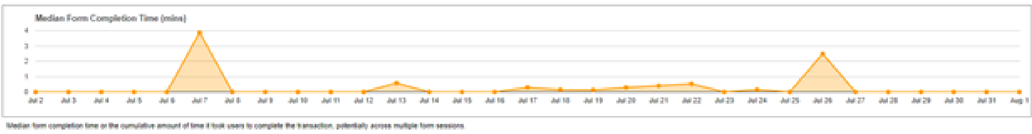
  The screenshot below displays an example of the *Form Abandonment Rate* chart.



- *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  icon.

The Submission Trend Chart (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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 for an individual form.

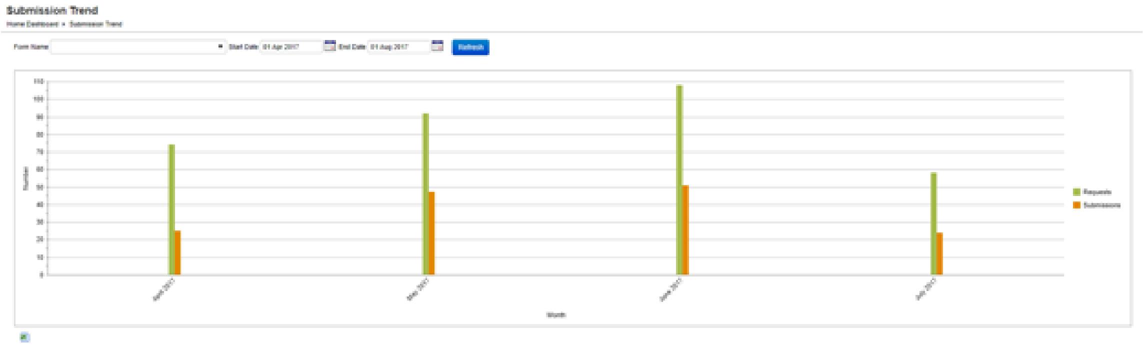
View Submission Trend Chart

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 Analytic*s* 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 v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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

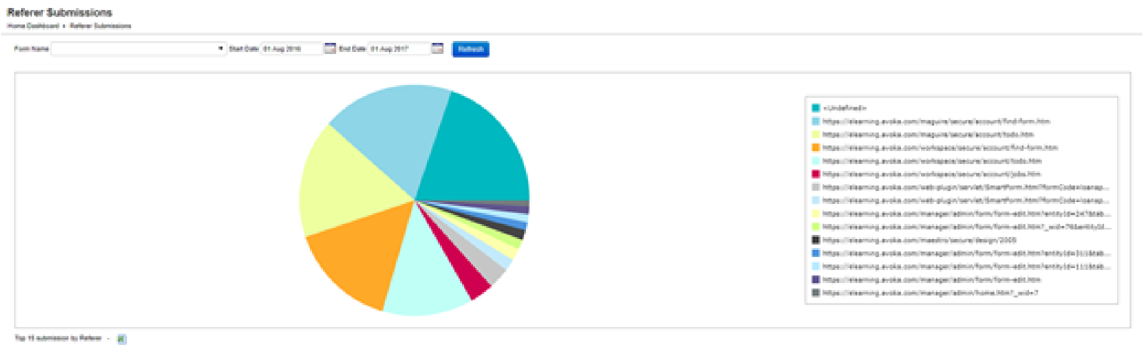
To view the *Referer Submissions* pie chart:

1. Navigate to *Analytics* from the menu bar.
   Navigating to *Analytics* will display the Analytic*s* 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 v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

The Browser Submissions Pie Chart

The *Browser Submissions* pie chart identifies and displays the top internet browsers and the versions used by form users to submit forms.

View Browser Submissions Pie Chart

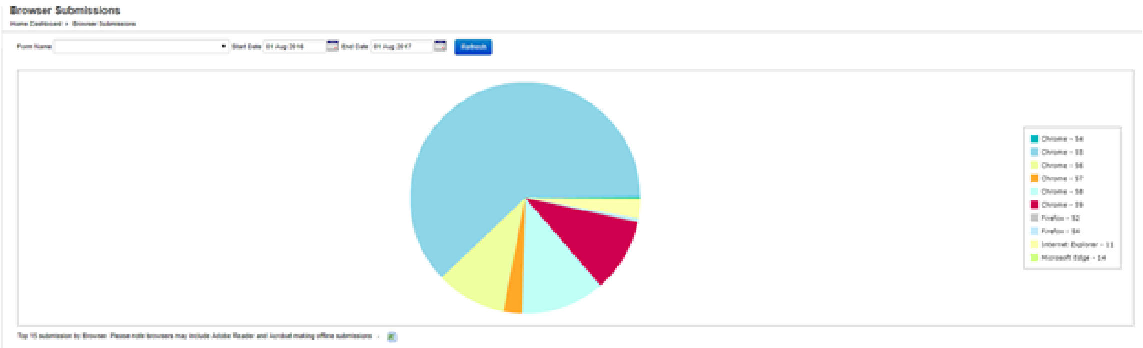
The *Browser Submissions* pie chart is accessed through the *Analytics* menu of Transact Manager. To view the *Browser Submissions Chart:*

1. Navigate to *Analytics* from the menu bar.
   Navigating to *Analytics* will display the Analytic*s* 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 v17.10)

Unknown macro: 'redirect'

Page Contents:

The Operating System Submissions Pie Chart

The *Operating System Submission* pie chart identifies the top operating systems used by form users to submit forms.

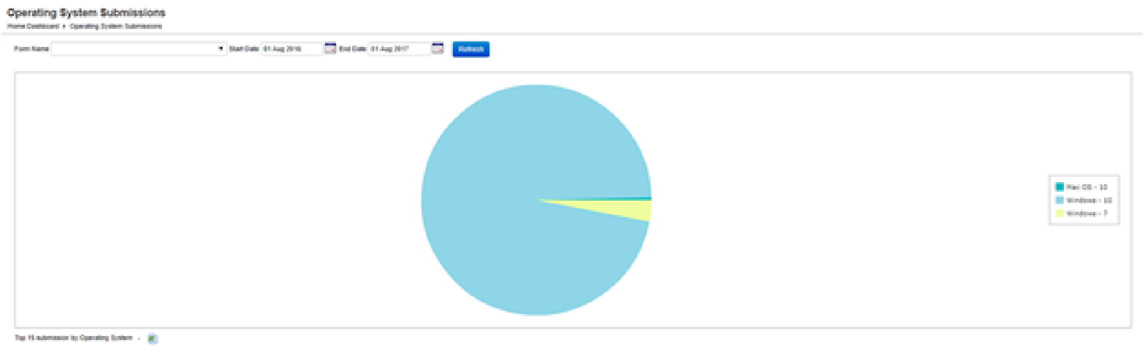
View Operating System Submissions Pie Chart

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.

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)

Forms Activity Chart (Manager v17.10)

Unknown macro: 'redirect'

Unknown macro: 'redirect'

Page Contents:

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)

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 v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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

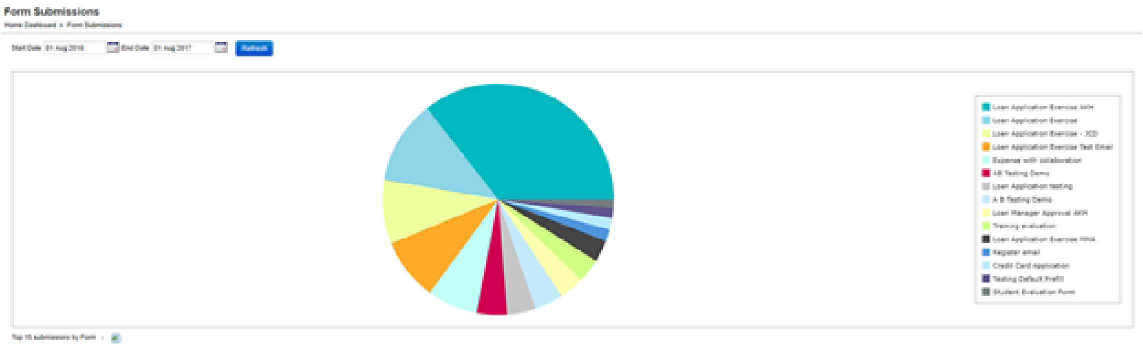
The *Form Submissions* pie chart is accessed through the *Analytics* menu of Transact Manager. To view the *Form Submissions* pie chart:

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 exported data (not just data for the most active forms).

Form A/B Testing (Manager v17.10)

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 v17.10)

Unknown macro: 'redirect'

Page Contents

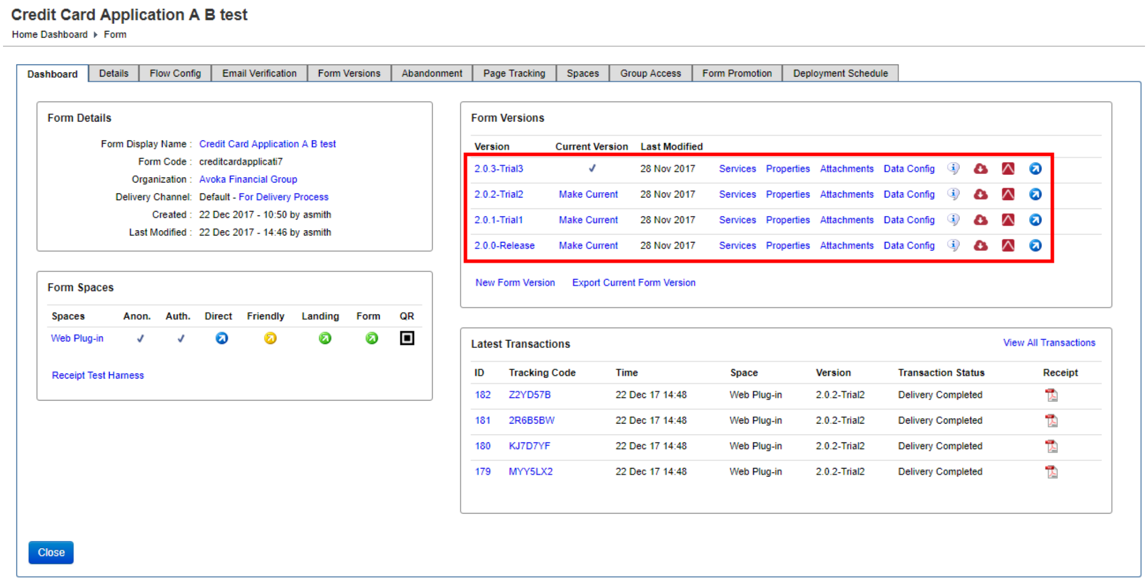
- Configure A/B Testing
- End the A/B Testing

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)

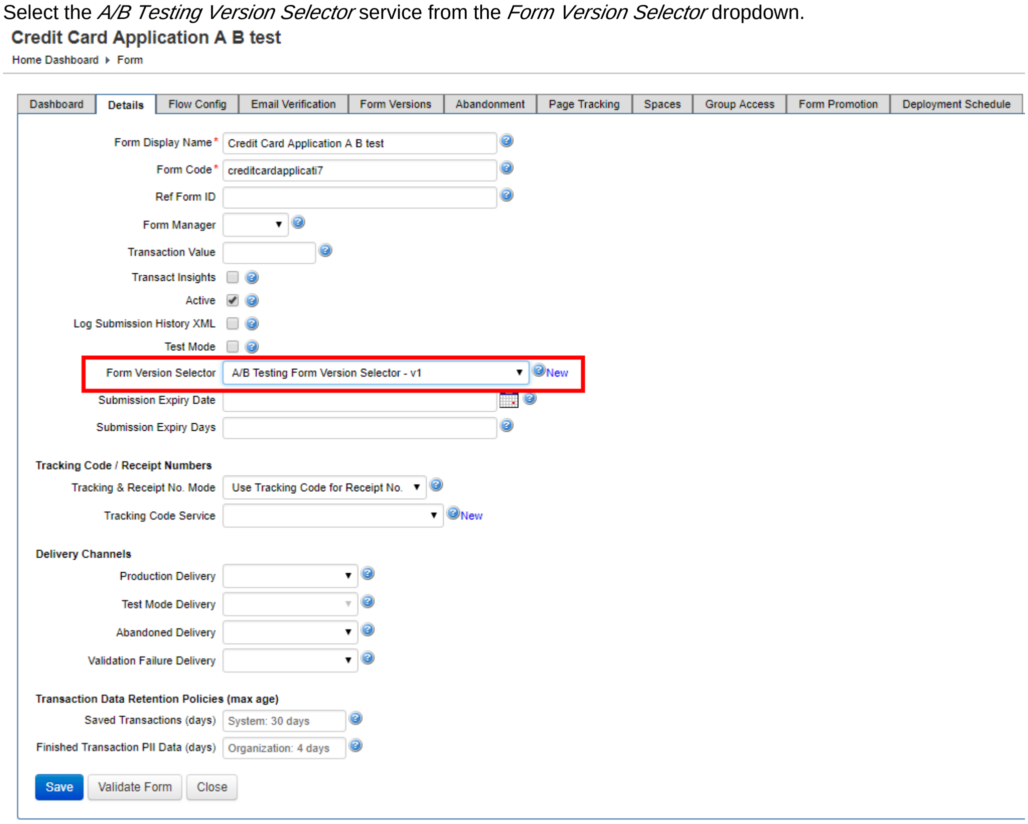
Configure A/B Testing

The example form displayed below has four form versions. As this form has not yet been configured for A/B testing, only the current version of the form is offered to users. In this case, it is the form version, ***2.0.3-Trial3***, which is ticked in the *Current Version* column.



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.



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 to display. By default, the *A/B Testing Form Version Selector* service randomly chooses a version to display from all versions of this form.

This service may be further customized if you wish to nominate only the relevant form versions to include in the A/B testing. It is advisable that you follow the steps in the *Electing Specific Form Versions Recommendations* section.

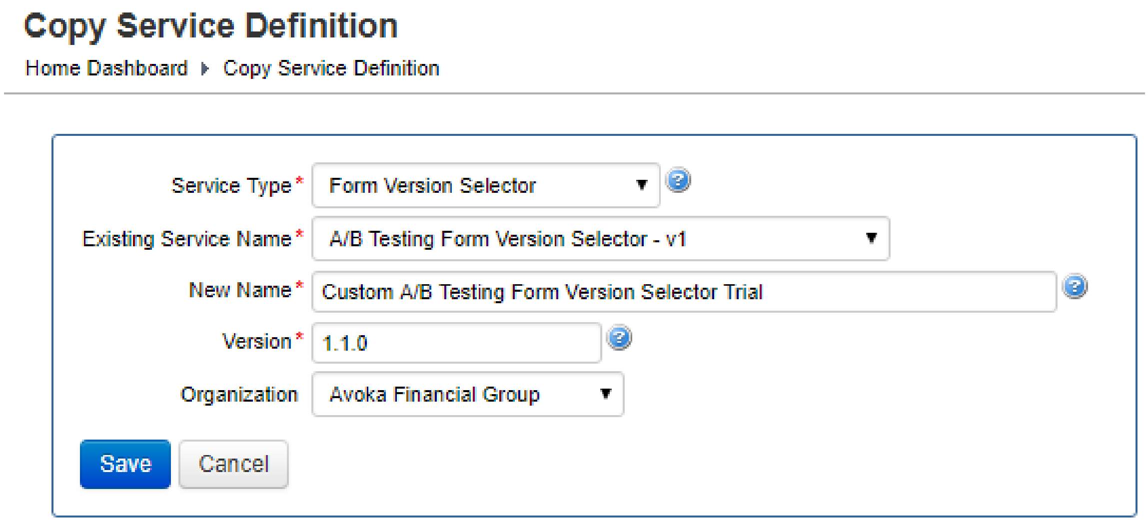
The A/B form trial period commences as soon as the *Form Version Selector* has been configured. From now on until the end of the trial period, whenever a user requests this form, any one of the elected versions (or all versions, if *Included Form Versions* is left blank) will be selected and rendered to the user requesting this form.

Electing Specific Form Versions Recommendations

In most cases A/B testing is for a new version of a form versus it's previous version. This means that you would need to elect the latest two versions of your form to include in the A/B test. However, by electing specific form versions to include this will affect any other form(s) in Transact Manager which is also using this same *A/B Form Version Selector* service.

So, when electing specific form versions to include in form A/B test, it is recommended to use a separate copy of the *A/B Form Version Selector* service for this form by doing the following:

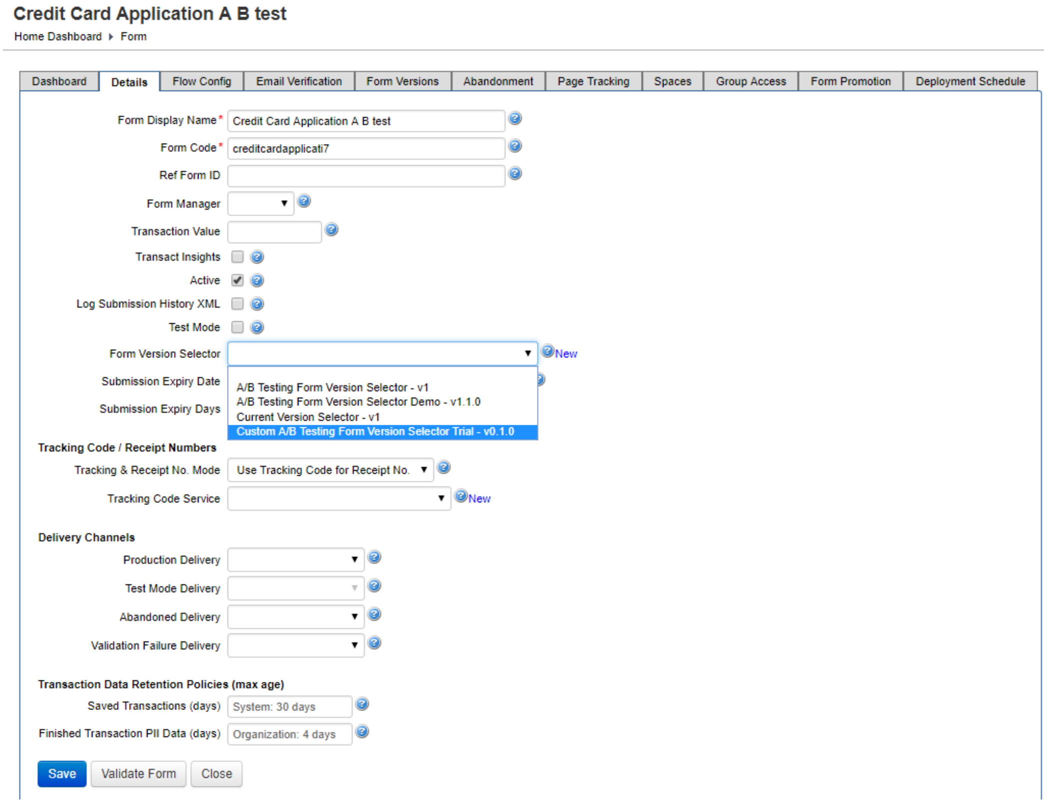
1. From the *Services* menu bar, select *All Services* from the dropdown menu.
2. Click on the *Copy* button.
3. Select *Form Version Selector* from the *Service Type* dropdown.
4. Select *A/B Testing Form Version Selector* from the *Existing Service Name* dropdown.
5. Enter a new name for this service 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.



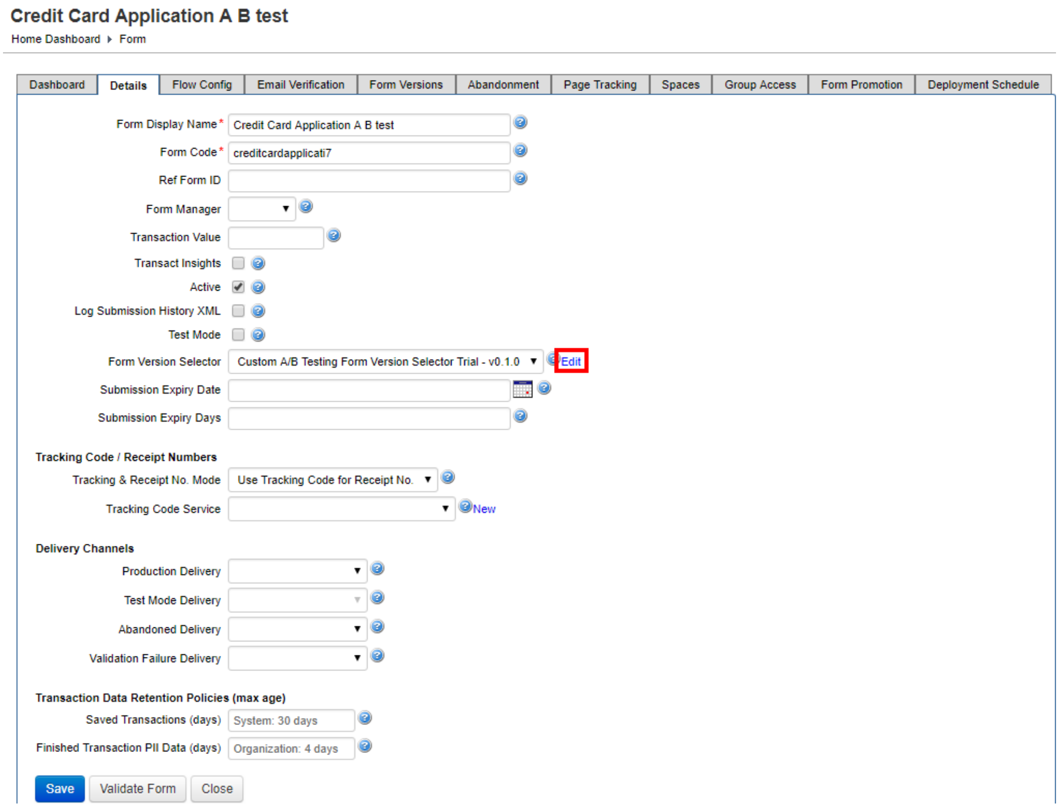
To nominate specific form versions to be included in the A/B form testing:

1. Select the new service, the *Custom A/B Testing Form Version Selector Trial* service in the above example, from the *Form Version Selector* dropdown.

2. Click the *Save* button.

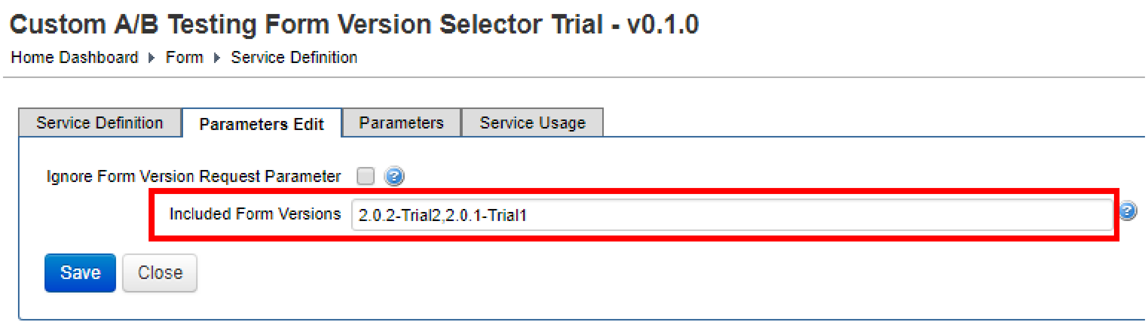


3. Click the *Edit* link as shown in the screenshot below.



The *Parameters Edit* tab of the *Custom A/B Testing Form Version Selector Trial* service definition is displayed. By default, the *Included Form Versions* is blank. If left blank, all form versions of the form are included in the A/B form testing. To elect only specific versions of your form to be included in the A/B form testing:

1. Enter the nominated form versions without spaces and separated by commas, as shown in screenshot below.
2. Click the *Save* button.



In this case, the A/B form testing will randomly select either *2.0.2-Trial2* or *2.0.1-Trial1* form version when presenting the *Credit Card Application A/B test* form to a user.

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 v17.10)

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, *Credit Card Application A/B test,* which show a comparison of form versions *2.0.2-Trial2* vs *2.0.1-Trial1*. The comparison is further categorized into *Opened*, *User Saved* and *Submitted*.

Further reporting may be available for A/B Testing analytics from Transact Insights.

Licensing Reports (Manager v17.10)

Unknown macro: 'redirect'

Overview

Transact Manager offers several licensing reports that can be initiated at any time by a user with appropriate permissions. These reports identify the licensing usage at the organizational level of the Transact Manager environment.

These licensing reports can be used to provide a comparison between the number of completed transactions being recorded in Transact Manager and the number of transactions being recorded in the Amazon Redshift (using Amazon S3 https://aws.amazon.com/s3/). This comparison can be used to confirm that the number of transactions that you have been billed for matches the number recorded in Transact Manager.

NOTE: There may be a slight variance between the number of transactions recorded in TM and the number recorded by Redshift. This slight variance is usually caused when new transactions in TM have not yet been published to Amazon Redshift or when transactions in TM have been purged but remain in the Redshift records.

Transaction Licensing

The Transaction Licensing Report displays transaction licensing usage for completed transactions. Across the Transact Platform, licensing data regarding organizations, forms, transactions, and services is automatically recorded and this report identifies and displays this usage based on the organizations associated with the Transact Manager environment.

The Transaction Licensing Report can be filtered to only display transactions matching some specified criteria. The following filter options are available from the Transaction Licensing Report.

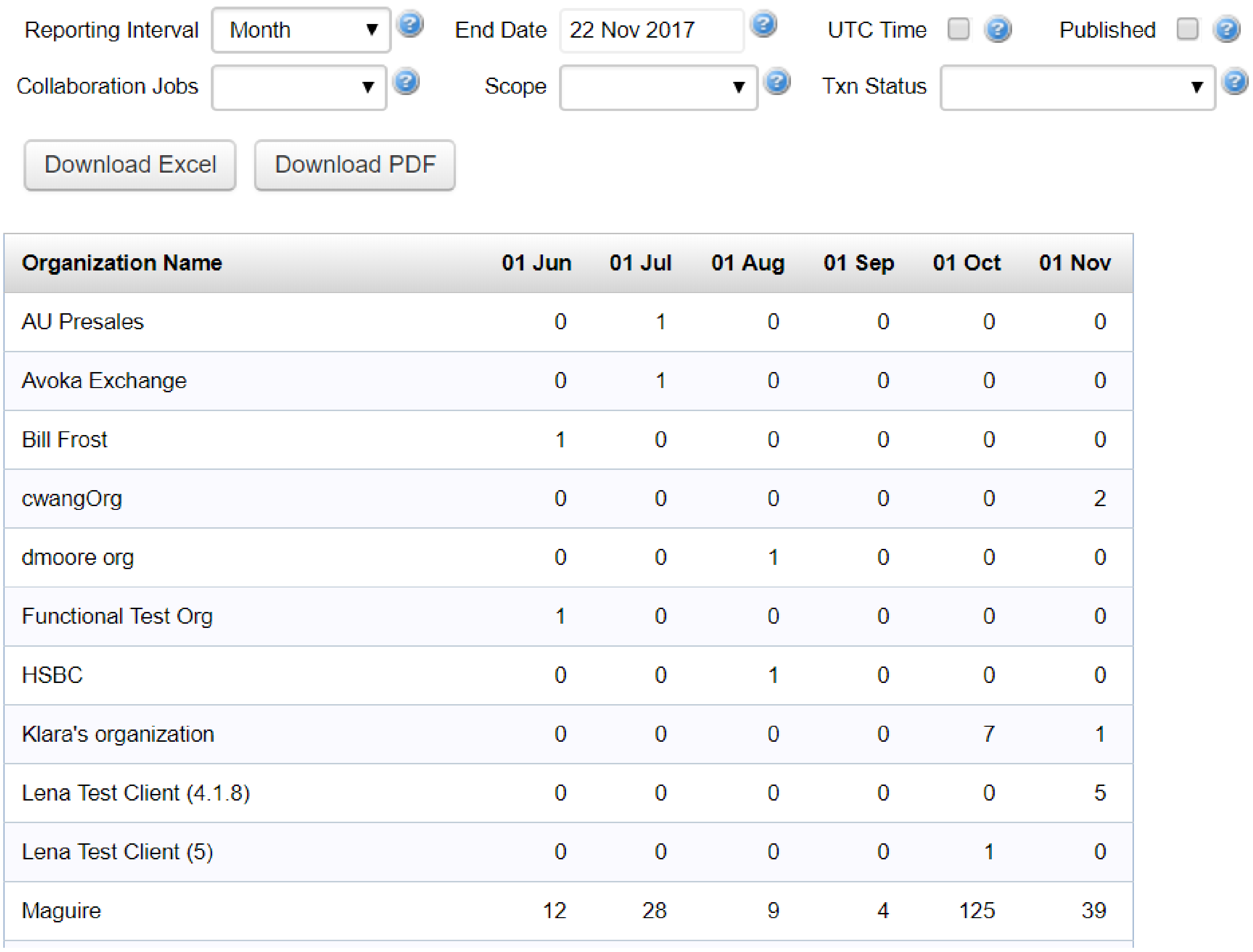
Reporting interval	This filter option allows you to set the reporting intervals of the report. The current options are Day, Week and Month.
Collaboration Jobs	This filter allows you to decide whether to only display transactions that are associated with a Collaboration Job or to display standalone transactions (transactions that DO NOT contain a collaboration job) or to display the report with both (default).
End Date	This filter option allows you to set the end date of the reporting period that will be represented in the Transaction Licensing Report.
Scope	This filter option allows you to decide whether the report will display transactions made by internal staff, external staff (customers/applicants) or both. The available options are Internal Txns, and External Txns. Leaving this filter blank will display both internal and external transactions.
UTC Time	Selecting this filter option checkbox assigns the Coordinated Universal Time (UTC) to the Transaction Licensing Report
Published	Selecting this filter option checkbox will filter out and only display transactions that have been published to Amazon Redshift. Leaving this checkbox blank will display all transactions.
Transaction (Txn) Status)	This filter option allows you to decide whether the report will display completed transactions or delivered abandoned transactions. Leaving this selection dropdown menu blank will display all transactions of any status.

Accessing the Transaction Licensing Report

To access the Transaction Licensing Report, follow the steps below.

1. Select *Reports* from the Transact Manager menu bar.
   Selecting *Reports* will display the Reports menu.
2. Click Transaction Licensing from the Reports menu.
   Clicking *Transaction Licensing* will display the Transaction Licensing Report.

The screenshot below displays an example of the Transaction Licensing Report with a monthly reporting interval.



Organization Name	01 Jun	01 Jul	01 Aug	01 Sep	01 Oct	01 Nov
AU Presales	0	1	0	0	0	0
Avoka Exchange	0	1	0	0	0	0
Bill Frost	1	0	0	0	0	0
cwangOrg	0	0	0	0	0	2
dmoore org	0	0	1	0	0	0
Functional Test Org	1	0	0	0	0	0
HSBC	0	0	1	0	0	0
Klara's organization	0	0	0	0	7	1
Lena Test Client (4.1.8)	0	0	0	0	0	5
Lena Test Client (5)	0	0	0	0	1	0
Maguire	12	28	9	4	125	39

The table below describes the additional options available from the Transaction Licensing Report.

Download Excel	Clicking this button will download a copy of the Transaction Licensing Report (according to the applied filters) in Excel format.
Download PDF	Clicking this button will download a copy of the Transaction Licensing Report (according to the applied filters) in PDF format.

Job Licensing

The Job Licensing Report displays transaction licensing data for transactions that were completed using a Collaboration Job.

The Job Licensing Report can be filtered to only display transactions matching some specified criteria. The following filter options are available from the Job Licensing Report.

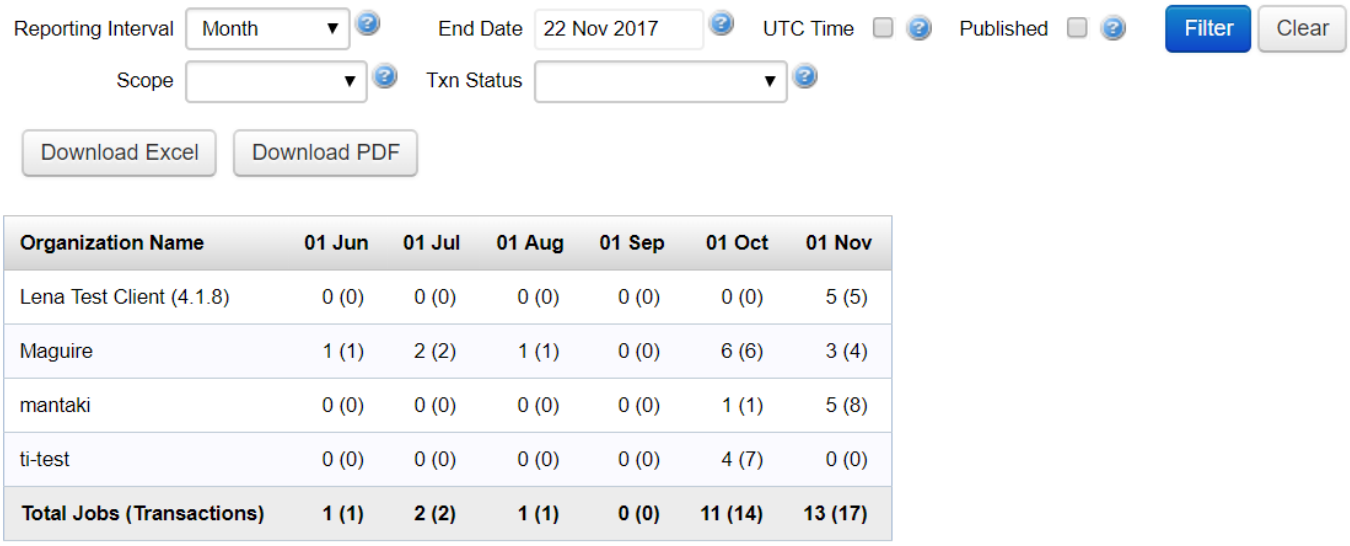
Reporting interval	This filter option allows you to set the reporting intervals of the report. The current options are Day, Week and Month.
End Date	This filter option allows you to set the end date of the reporting period that will be represented in the Transaction Licensing Report.
Scope	This filter option allows you to decide whether the report will display transactions made by internal staff, external staff (customers/applicants) or both. The available options are Internal Txns, and External Txns. Leaving this filter blank will display both internal and external transactions.
UTC Time	Selecting this filter option checkbox assigns the Coordinated Universal Time (UTC) to the Transaction Licensing Report.
Published	Selecting this filter option checkbox will filter out and only display transactions that have been published to Amazon Redshift. Leaving this checkbox blank will display all transactions.
Transaction (Txn) Status)	This filter option allows you to decide whether the report will display completed transactions or delivered abandoned transactions. Leaving this selection dropdown menu blank will display all transactions of any status.

Accessing the Job Licensing Report

To access the Job Licensing Report, follow the steps below.

1. Select *Reports* from the Transact Manager menu bar.
   Selecting *Reports* will display the Reports menu.
2. Click *Job Licensing* from the Reports menu.
   Clicking *Job Licensing* will display the Transaction Licensing Report.

The screenshot below displays an example of the Job Licensing Report with a monthly reporting interval.



Organization Name	01 Jun	01 Jul	01 Aug	01 Sep	01 Oct	01 Nov
Lena Test Client (4.1.8)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	5 (5)
Maguire	1 (1)	2 (2)	1 (1)	0 (0)	6 (6)	3 (4)
mantaki	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)	5 (8)
ti-test	0 (0)	0 (0)	0 (0)	0 (0)	4 (7)	0 (0)
Total Jobs (Transactions)	**1 (1)**	**2 (2)**	**1 (1)**	**0 (0)**	**11 (14)**	**13 (17)**

The table below describes the additional options available from the Transaction Licensing Report.

Download Excel	Clicking this button will download a copy of the Transaction Licensing Report (according to the applied filters) in Excel format.
Download PDF	Clicking this button will download a copy of the Transaction Licensing Report (according to the applied filters) in PDF format.

System Configuration (Manager v17.10)

Unknown macro: 'redirect'

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

The list below identifies the topics covered within this section.

- Multi-Environment (Manager v17.10)
- Server Nodes (Manager v17.10)
- Outgoing Email (Manager v17.10)

Multi-Environment (Manager v17.10)

Unknown macro: 'redirect'

The content within this section covers information relating to working with multiple Transact Manager environments for testing purposes.

The list below identifies the topics covered within this section.

- Multi-Environment Support Overview (Manager v17.10)
- Migrate Services (Manager v17.10)
- Migrate Form Space (Manager v17.10)
- Migrate Security Managers (Manager v17.10)
- Migrate an Organization (Manager v17.10)
- Migrate a Form (Manager v17.10)
- Migrate Groups (Manager v17.10)
- Migrate Roles (Manager v17.10)
- The Import Log (Manager v17.10)
- Form Test Mode (Manager v17.10)

Multi-Environment Support Overview (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

Error rendering macro 'contentbylabel'

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

Page Contents:

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 and being 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 v17.10)
2. Migrate Form Space (Manager v17.10)
3. Migrate Security Managers (Manager v17.10)
4. Migrate an Organization (Manager v17.10)
5. Migrate a Form (Manager v17.10)
6. Migrate Groups (Manager v17.10)
7. Migrate Roles (Manager v17.10)

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.

Migrate Services (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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.

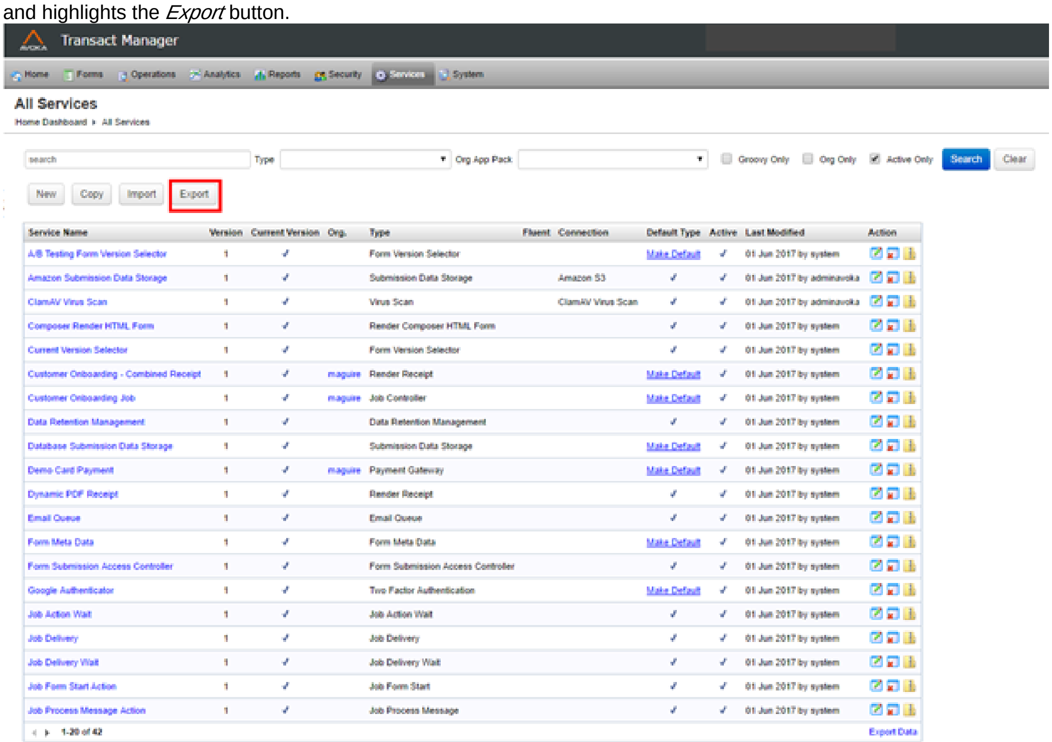
To export a set of Services:

1. Navigate to *Services* from the menu bar.
   Navigating to *Services* will display the *Services Dropdown Menu.*

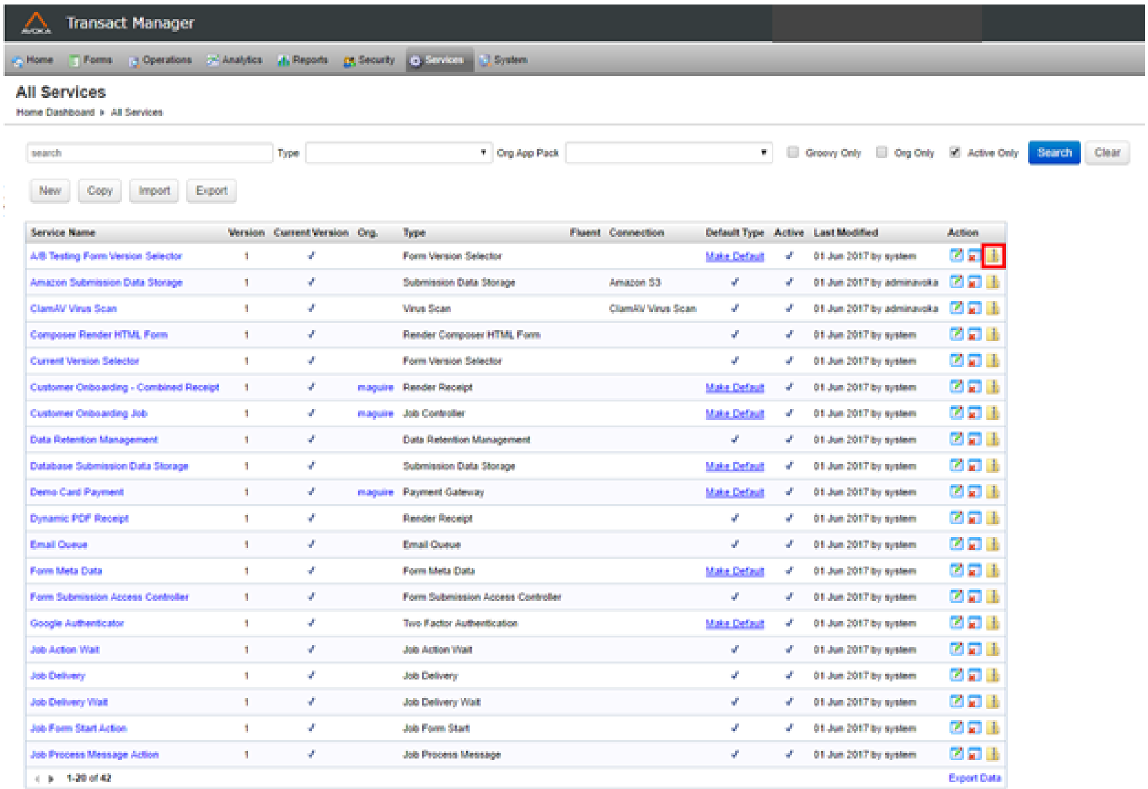
2. Select *All Services* from the *Services Dropdown Menu.*
   Selecting *All Services* will display the list of services currently configured in the selected TM environment.

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.



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.

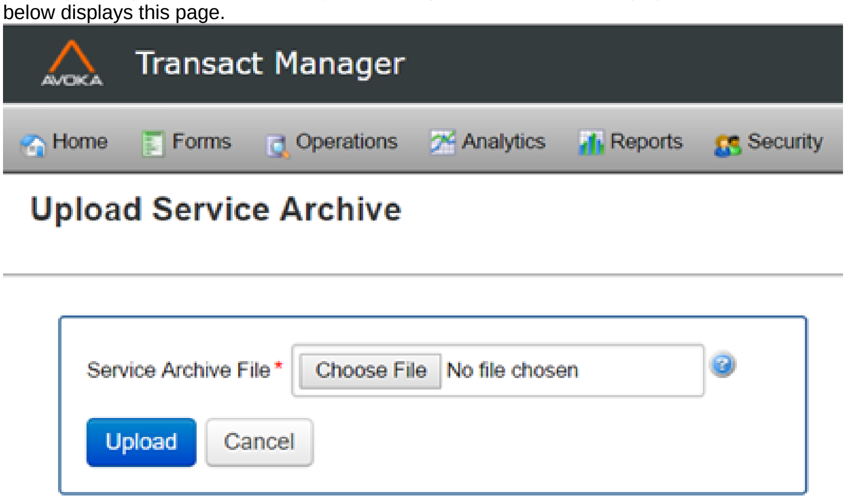


You can also search or filter this list by using the search textbox or the various dropdown menus.

Import Services

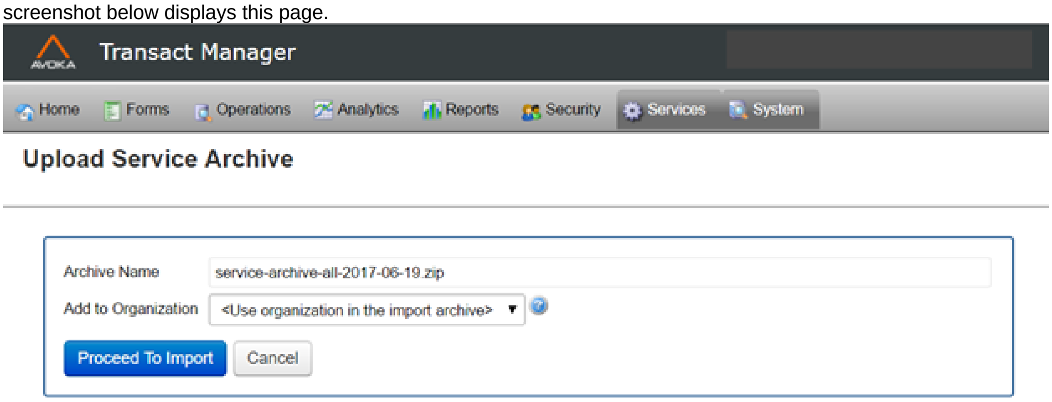
Once you have exported the list of services (or individual service) and downloaded the *Service Archive Zip File,* the next step is importing the *Service Archive Zip File* to another TM environment.

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.
   

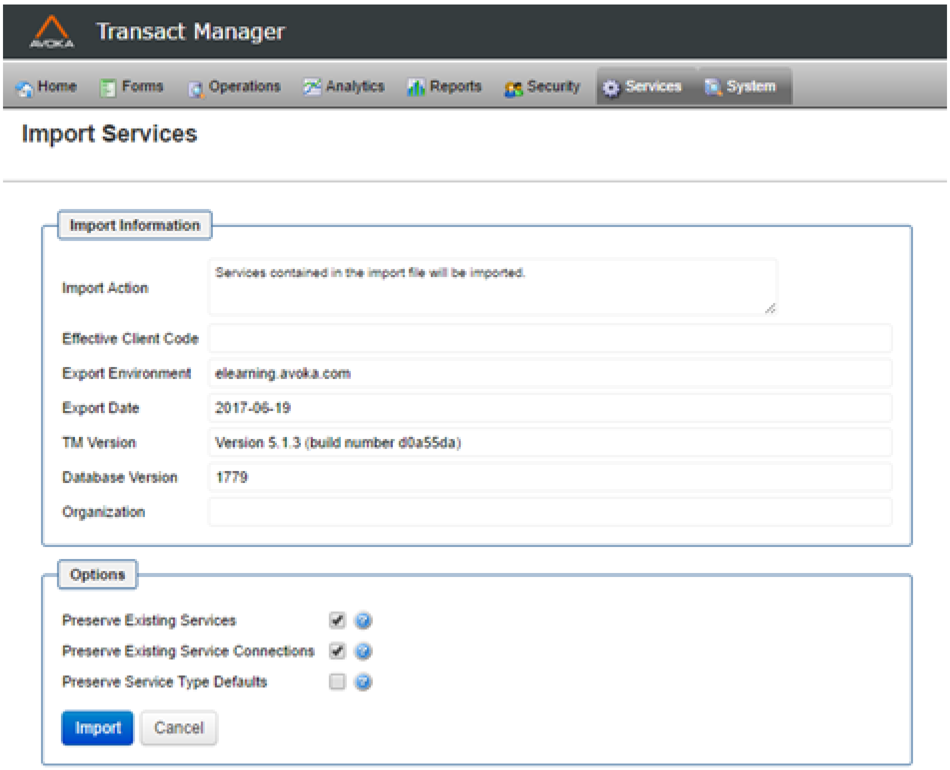
4. Click the *Choose File* button and navigate to the folder on your computer where the downloaded *Service Archive* is located and select the *Service Archive Zip File.*
5. Click the *Upload* button.
   Clicking the *Upload* button will direct you to the *Upload Service Archive* page and will ask you 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.



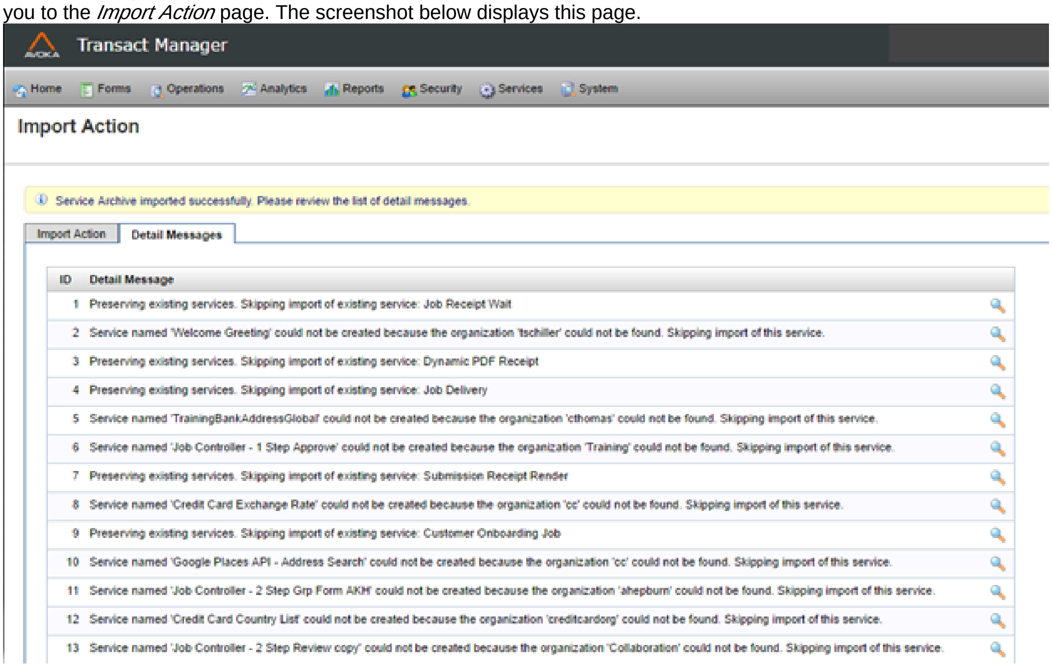
6. Select the organization that you want to add the services to or use the organization/s already configured in the import archive file.
7. Click the *Proceed To import* button.
   Clicking the *Proceed To import* button will direct you to the *Import Services* page. The screenshot below displays this page.

> Check the *Import Action* field for any indication of import conflicts that may need to be resolved.



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.



Clicking the  icon displays the details of each import action.

Migrate Form Space (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

- Export Form Spaces
- Import Form Spaces

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)

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.

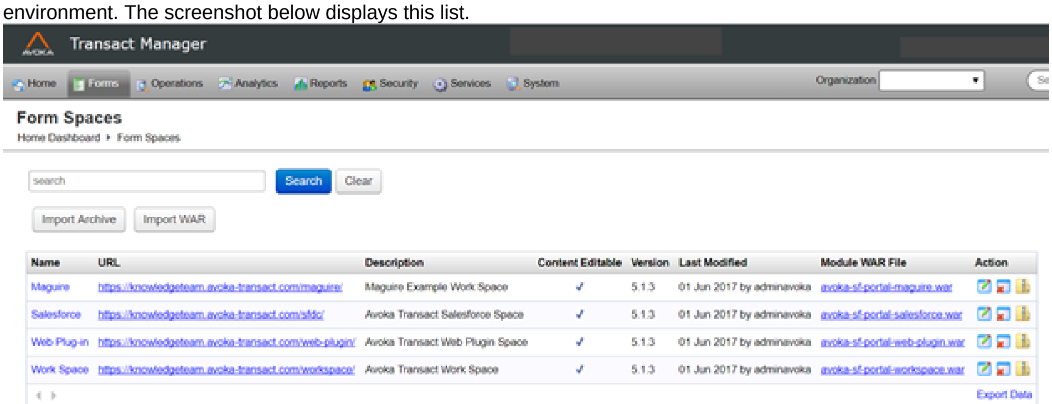
Export Form Spaces

The first step in migrating a form space is creating a form space archive zip file and exporting it.

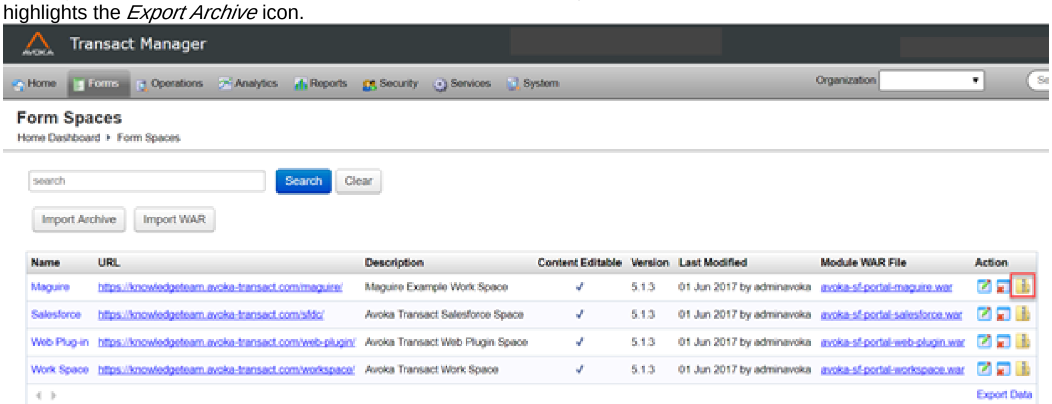
To export a form space:

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.



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.



Import Form Spaces

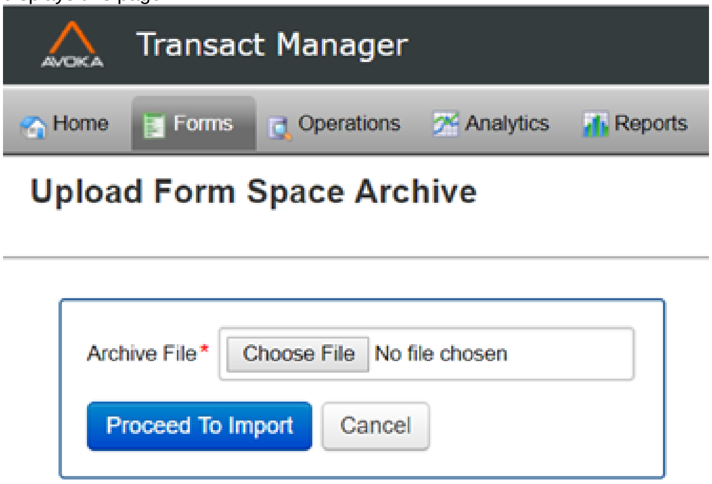
Once you have exported the form space and created and downloaded the *Form Space Archive Zip File,* the next step in migrating a form space is importing the *Form Space Archive Zip File* to the new environment.

To import a form space:

1. Navigate to *Forms > Form Spaces*

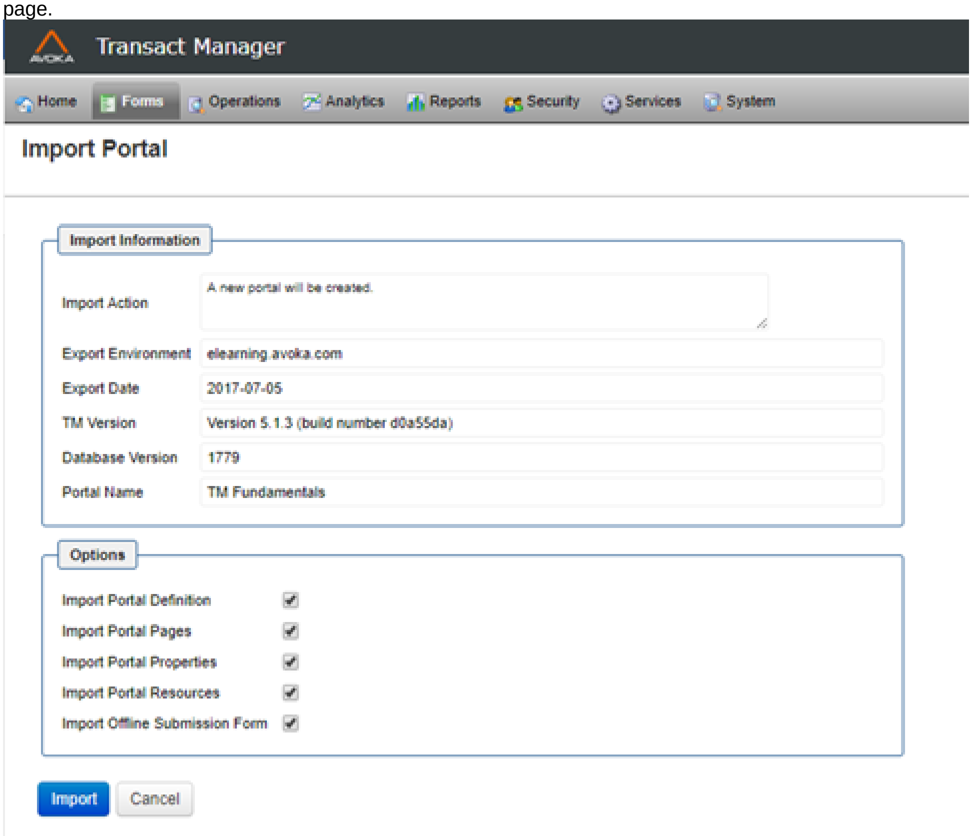
2. Click the *Import Archive* button.
   Clicking this button will direct you to the *Upload Form Space Archive* page. The screenshot below

displays this page.

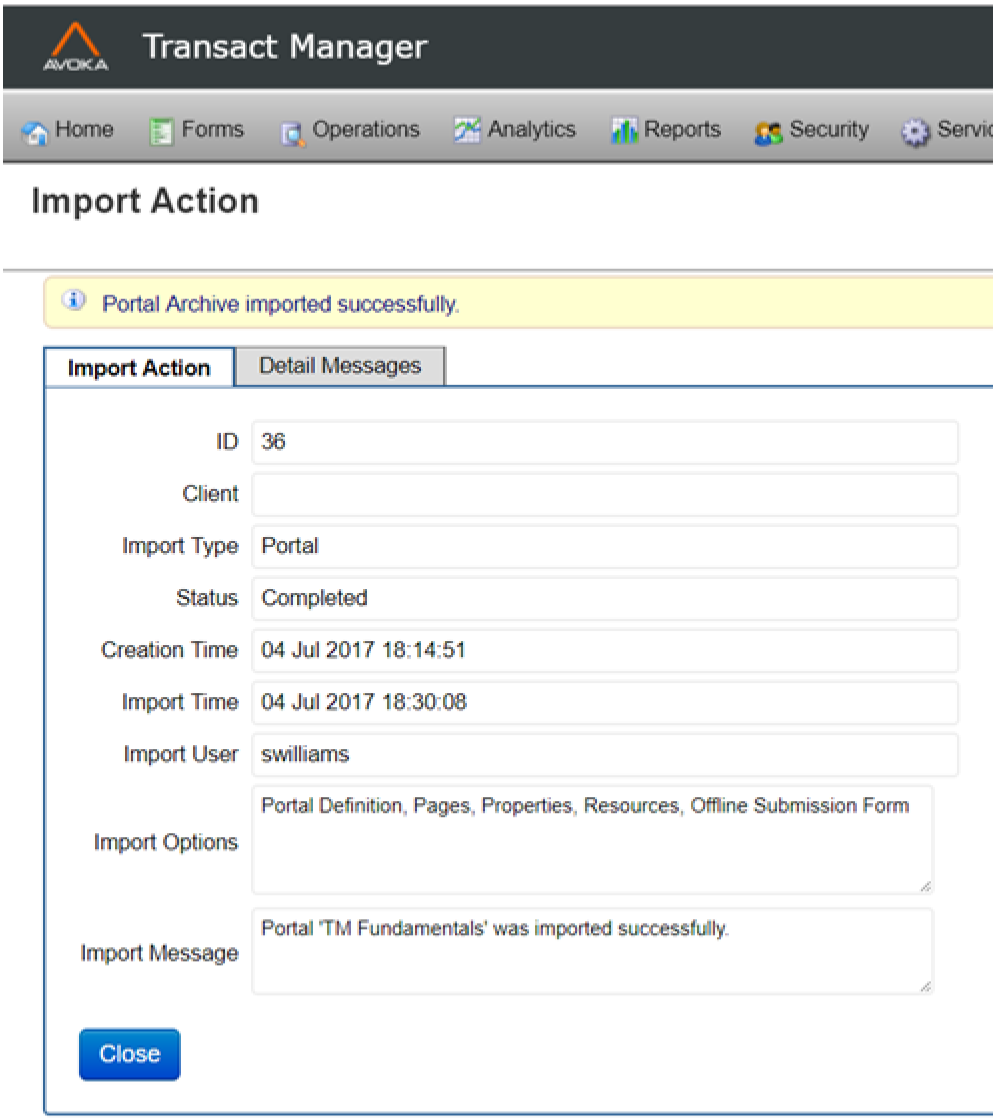


3. Click the *Choose File* button and select the *Form Space Archive Zip File* on your computer.

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.



7. 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 v17.10)

Page Contents:

- Export Security Managers
- Import Security Managers

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)

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.

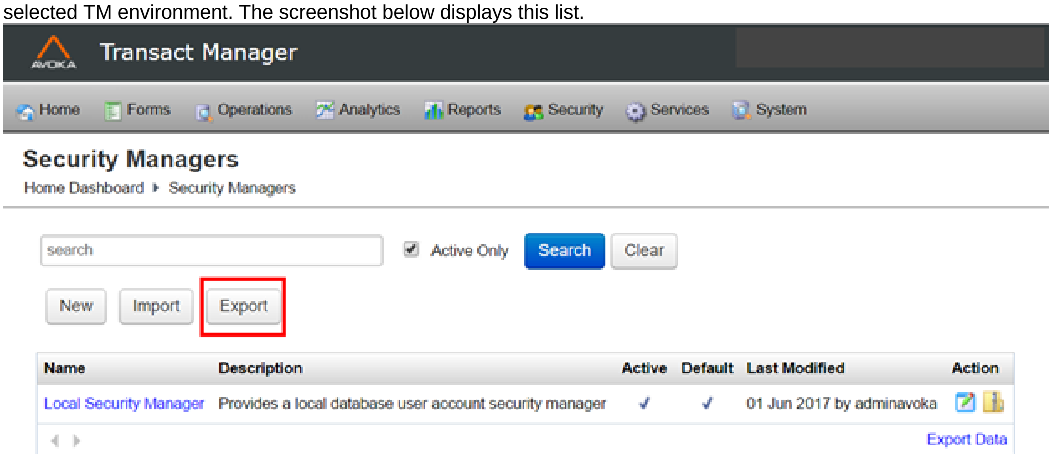
Export Security Managers

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:

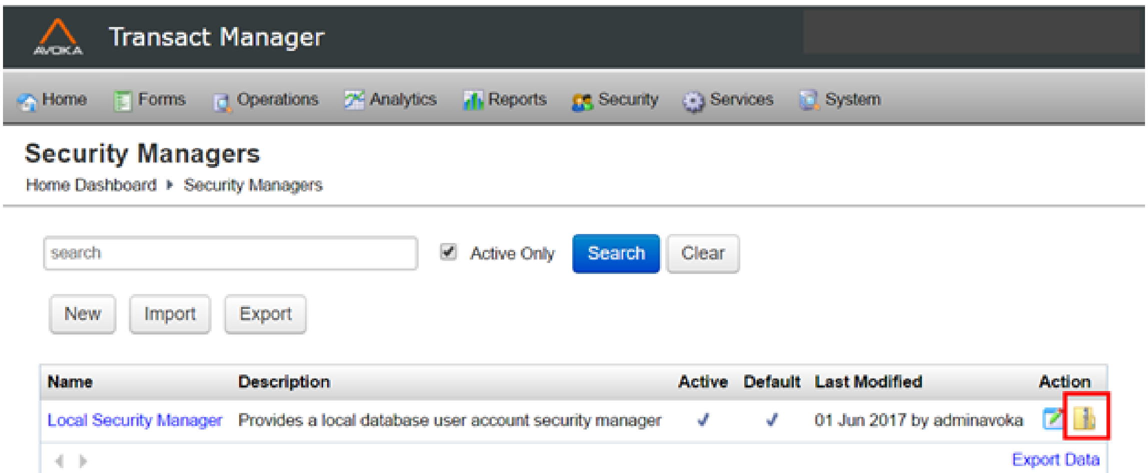
1. Navigate to Security from the menu bar.
   Navigating to *Security* will display the *Security Menu*.

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.

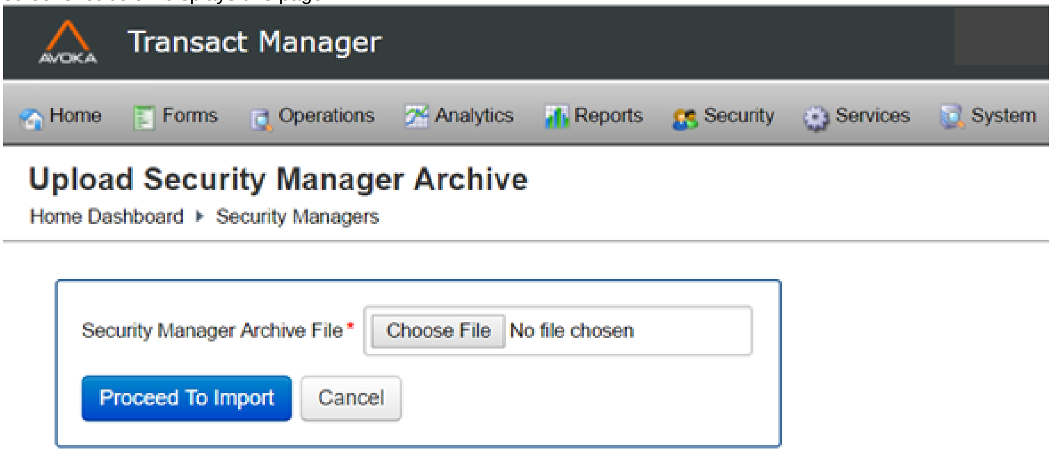


Import Security Managers

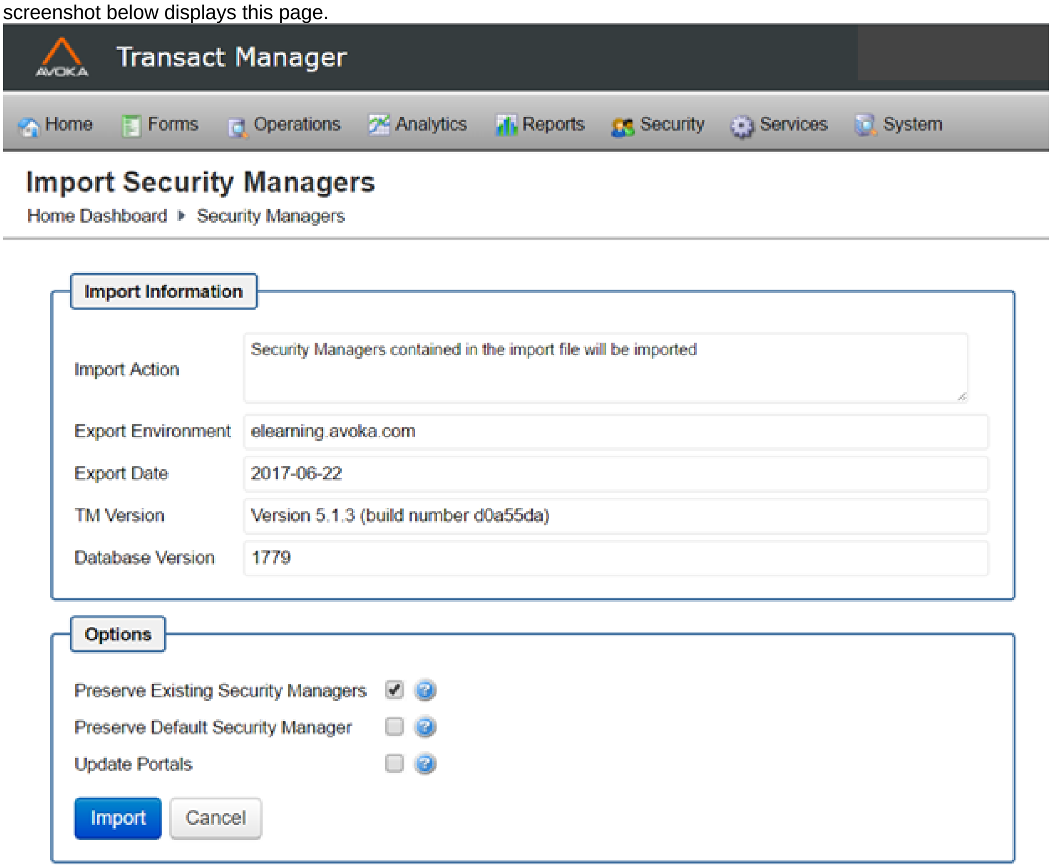
The next step in migrating a set of security managers from one environment to another is importing the downloaded *Security Manager Export Archive Zip File* to the destination TM environment.

To import a security manager archive zip file to a TM environment:

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.

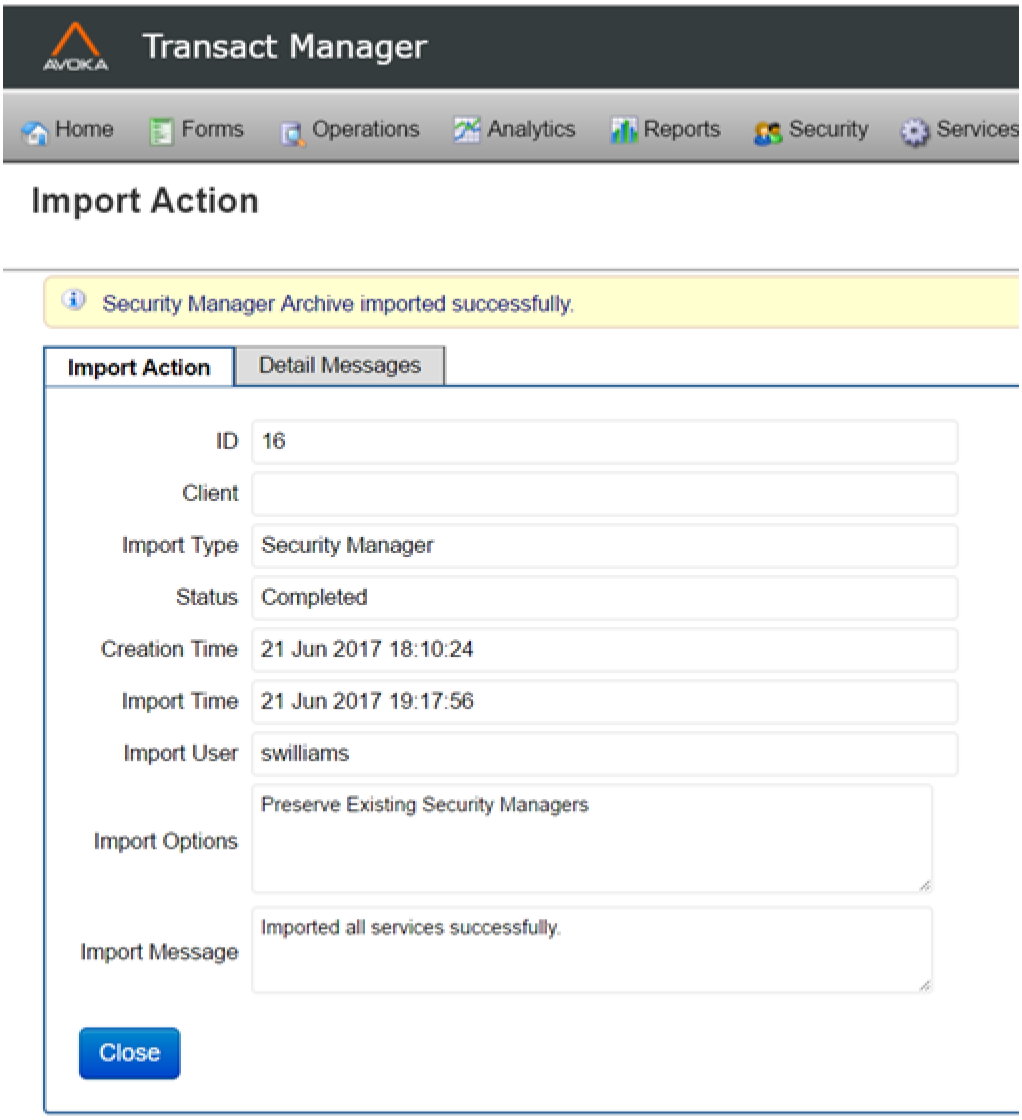


3. Click the *Choose File* button and navigate to the folder on your Computer where the downloaded *Security Manager Archive Zip File* is located and select the zip file.
4. Click the *Proceed To Import* button.
   Clicking the *Proceed To Import* button will direct you to the *Import Security Managers* 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.



The *Import Action* page will identify the *Import Options* that you selected, and will display a message if the import was successful.

7. 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 v17.10)

Unknown macro: 'redirect'

Page Contents:

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.

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)

Export an Organization

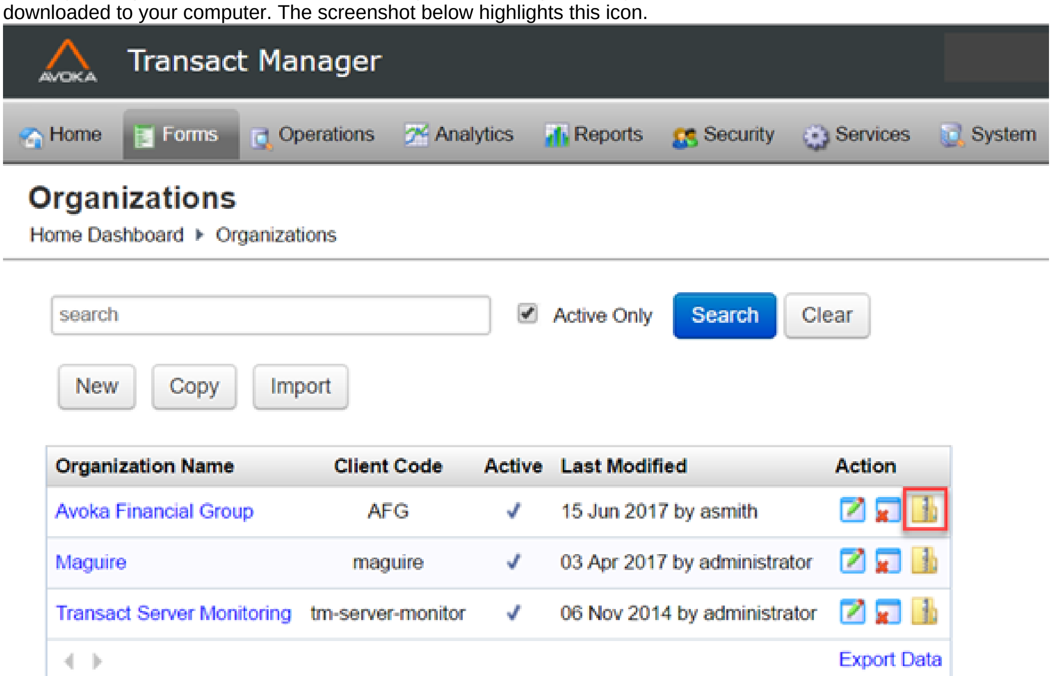
The first step in migrating an organization from one environment to another is exporting it.

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.



Import an Organization

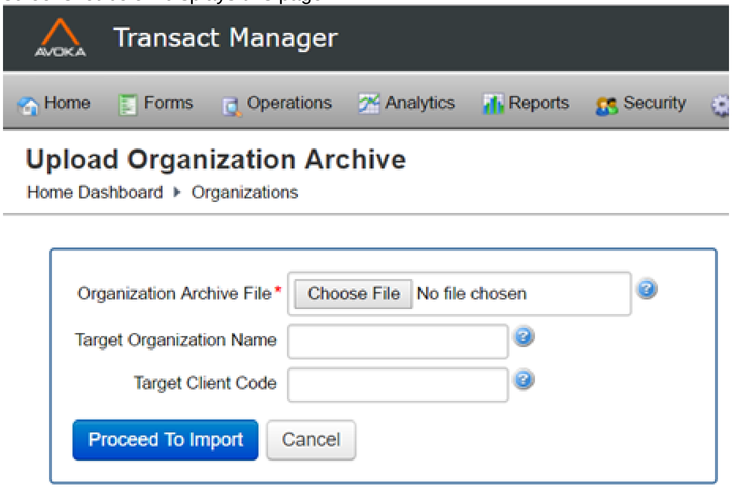
Once you have exported the organization and created the zip file, the next step in migrating an organization from one environment to another is importing the created zip file to the new environment.

To import an organization to a new environment:

1. Navigate to *Forms* from the menu bar.
   Navigating to *Forms* will display the *Forms Menu*.

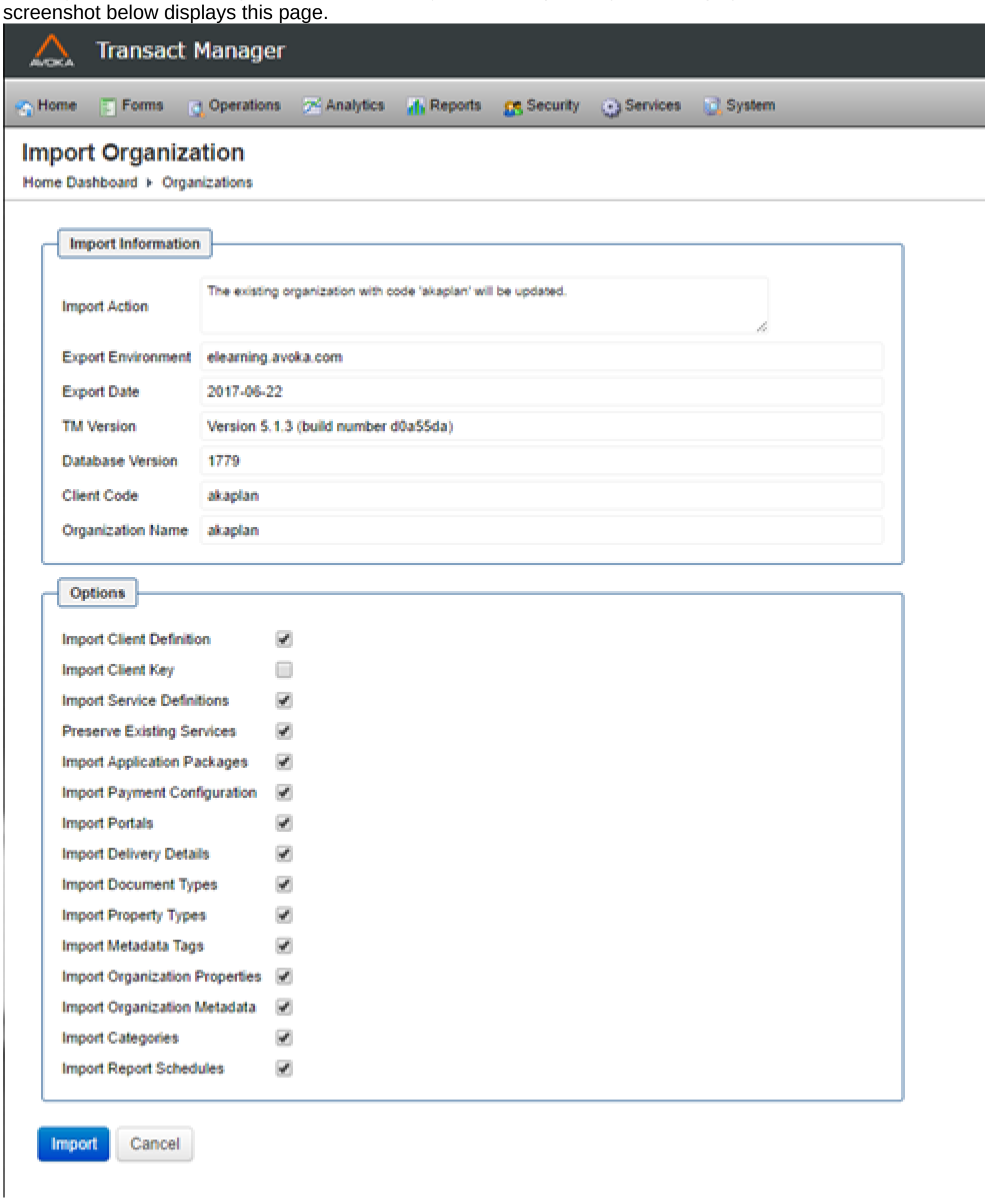
2. Select *Organizations* from the *Forms Menu*.
   Selecting *Organizations* will display the list of Organizations configured in the selected TM environment.

3. Click the *Import* button.
Clicking the *Import* button will direct you to the *Upload Organization Archive* page. The screenshot below displays this page.



4. 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.

5. 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.

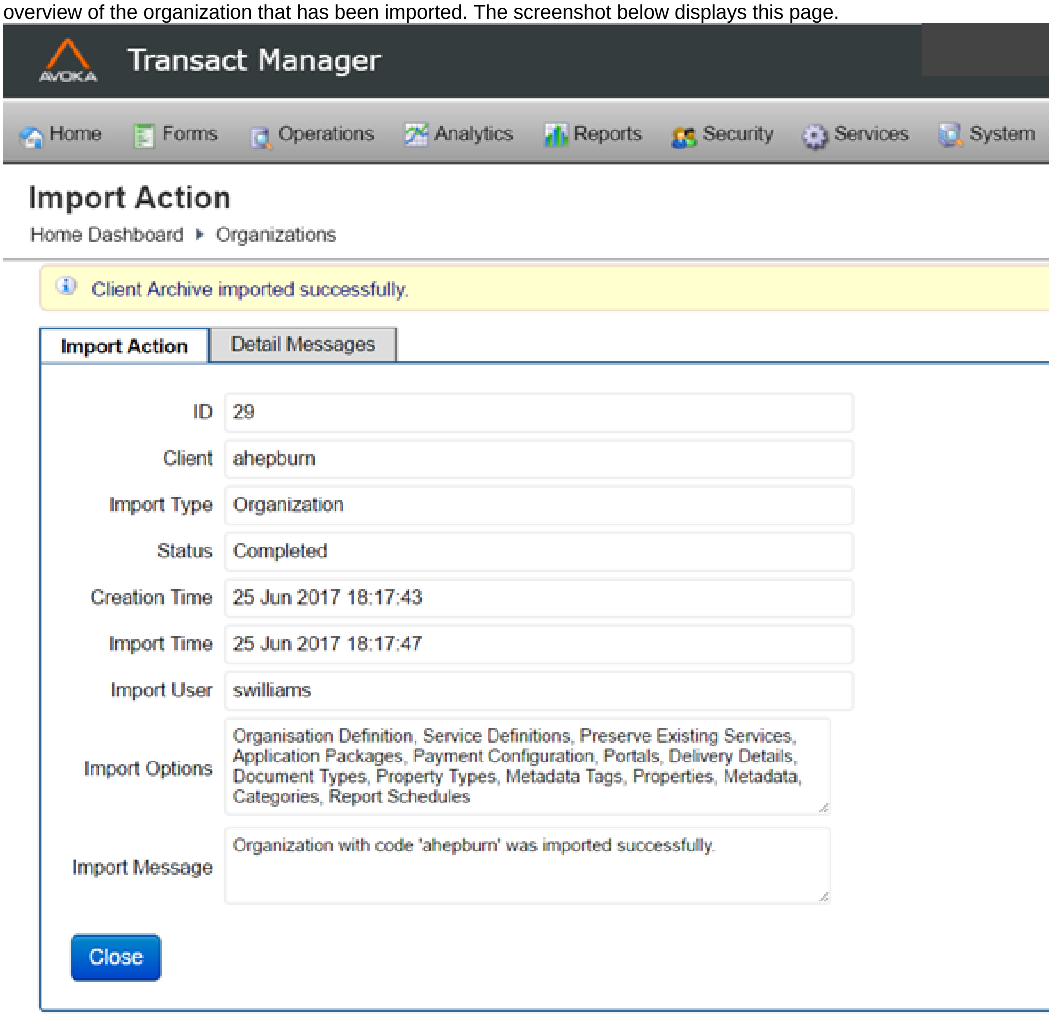


The *Import Information* section of this page identifies the environment that the organization is being migrated from, the export date and the client code and the organization name of the organization being imported.

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 *o*rganizations currently configured in the selected TM environment.

Migrate a Form (Manager v17.10)

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:

Transact Manager allows you to migrate the current version of the form, or all versions of a form from one TM environment to another.

When using Insights analytics, please be aware that the Transact Insights checkbox may be deselected when you migrate between environments. You should always check the setting after importing into production (or any environment where analytics should be collected). Information on the Transact Insights checkbox can be found here - Getting Started.

Exporting a form from a TM environment, with Insights analytics disabled, will change the Transact Insights checkbox of the form to be deselected. This means when you import into another TM environment such as production, that has Insights analytics enabled, the form will be set to not collect Insights analytics. You will need to update the imported form. If you do not update the imported form, Insights analytics will not be gathered.

You should always double check the Transact Insights checkbox on the form after exporting and importing between TM environments.

Export a Form and All Versions

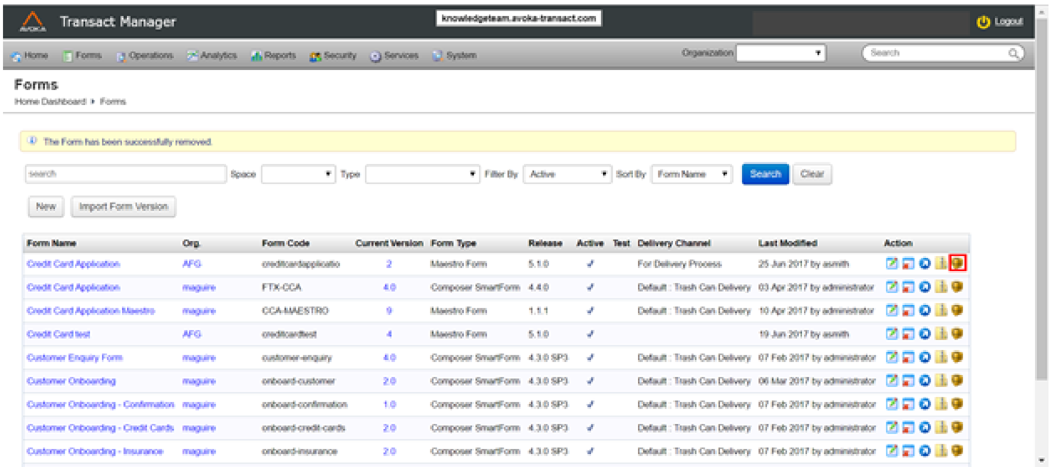
The first step in migrating a form is exporting it. Transact Manager allows you to export a form and all its associated versions.

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.



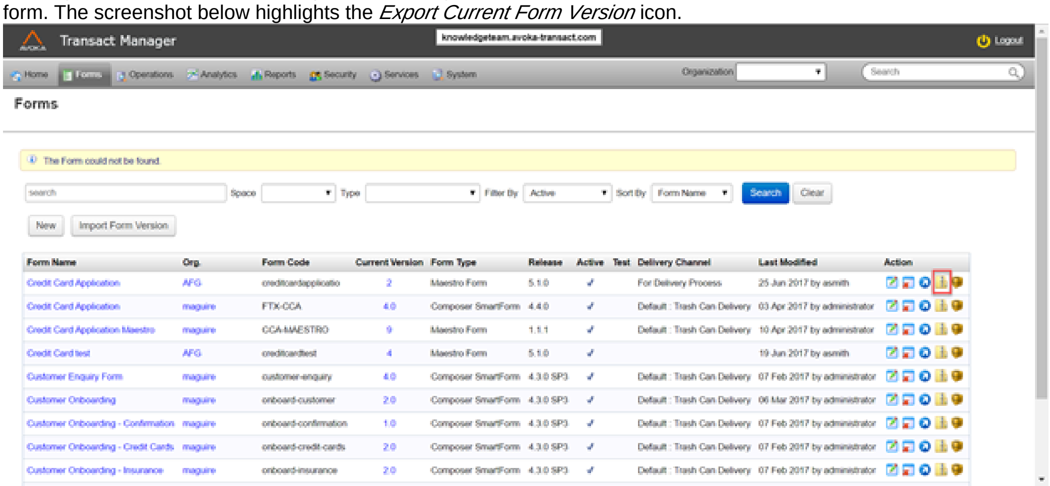
Export a Single Form Version

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

2. 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.

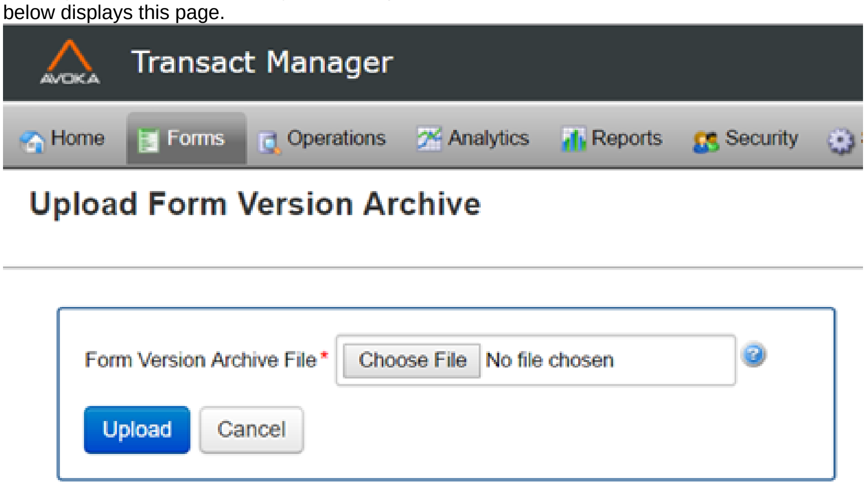


Import a Form (One or Multiple Versions)

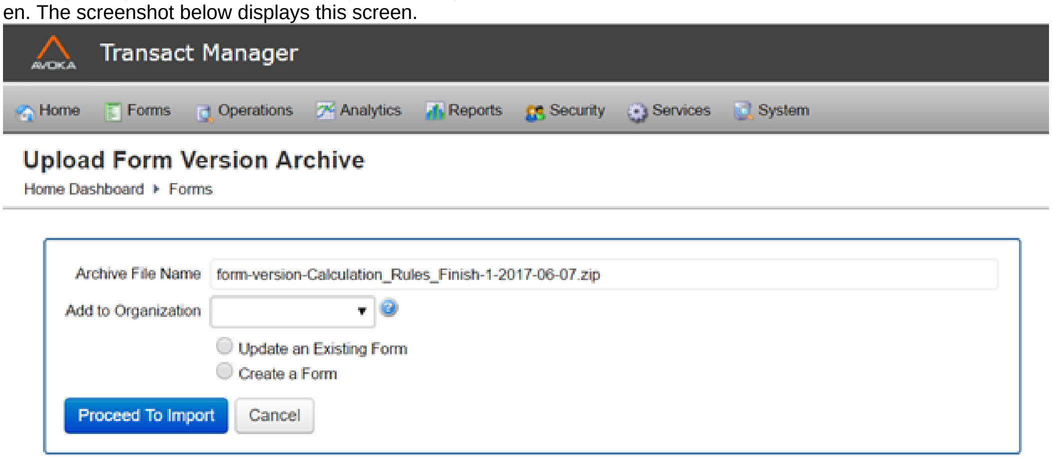
Once you have created the zip file (whether the single form version or all versions of the form), the next step in migrating a form from one environment to another is importing it to the new environment.

To import a form to a TM environment:

1. Navigate to *Forms > Forms* from the menu bar
2. 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.



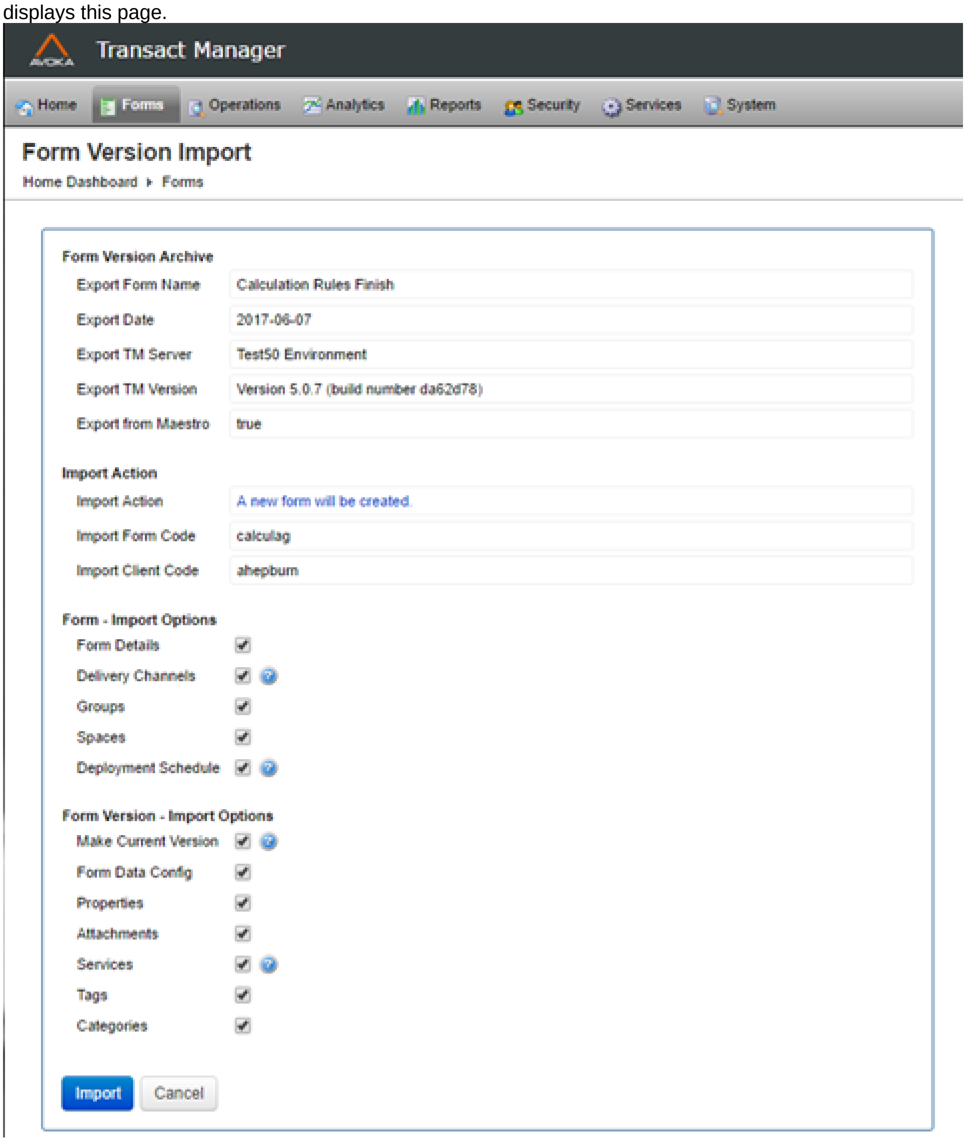
3. Click the *Choose File* button and select the exported zip file on your computer.
4. Click the *Upload* button.
Clicking the *Upload* button will redirect you to the *Upload Form Version Archive Confirmation* scre en. The screenshot below displays this screen.



5. Select the organization that you would like to add the form to by using the dropdown menu.
6. 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.

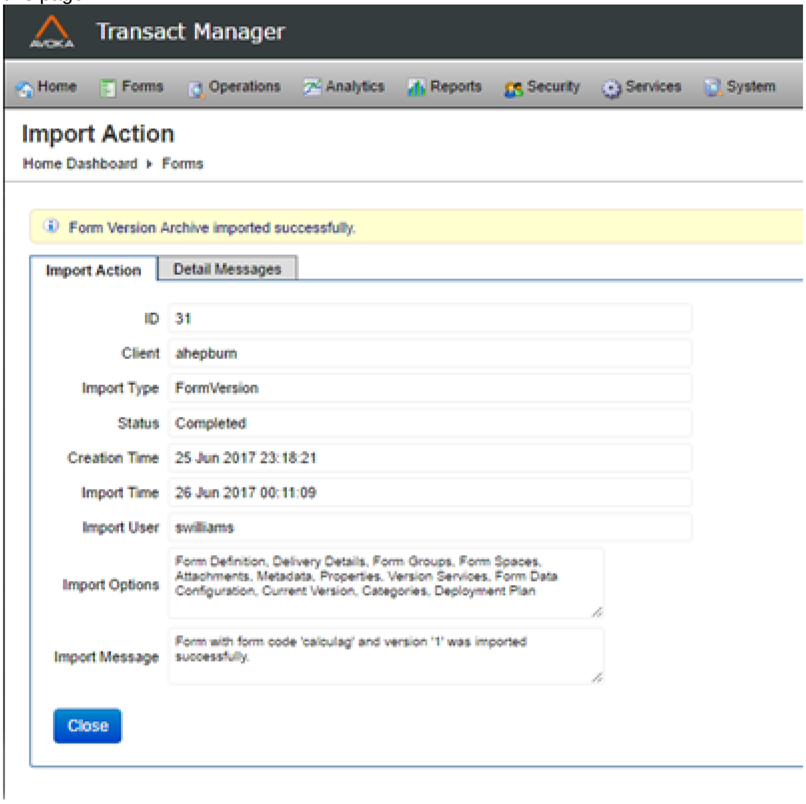
7. Click the *Proceed To Import* button.
   Clicking this button will direct you to the *Form Version Import* page. The screenshot below displays this page.



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).

10. Click the *Import* button.
    Clicking the *Import* button will direct you to the *import Action* page. The screenshot below displays this page.



11. Click the *Close* button to return to the list of forms configured on the selected TM environment.

Migrate Groups (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

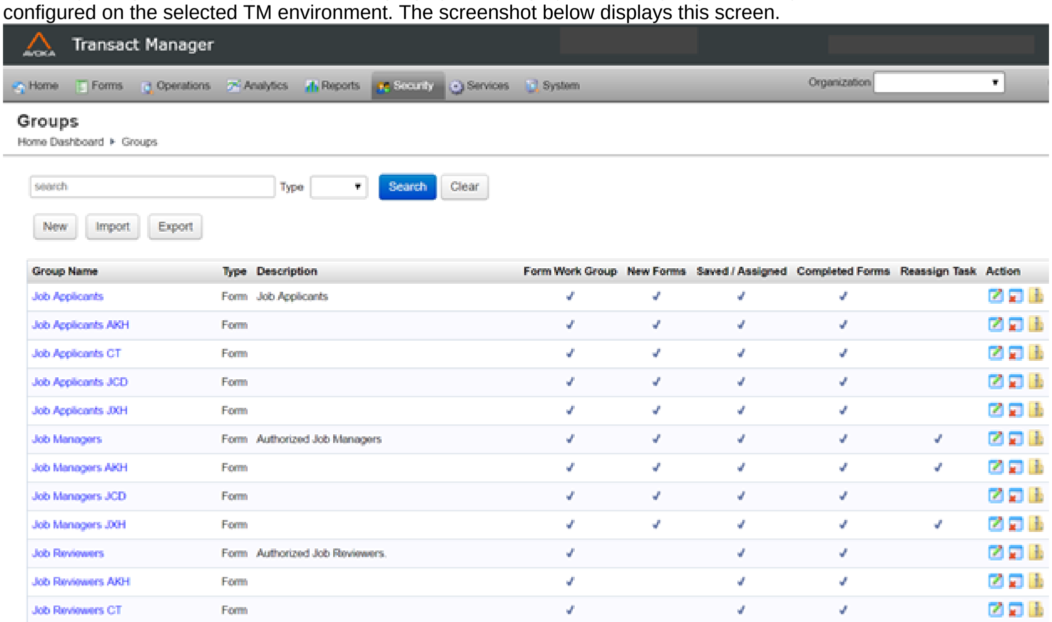
Groups in Transact Manager are used to define a set of users with the same privileges. To save time and resources, Transact Manager allows you to migrate a full set of groups or a single group from one environment to another. It is important to remember that migrating a group does not mean migrating 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

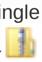
The first step in migrating a group from one environment to another is exporting the group.

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.
   

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 ().

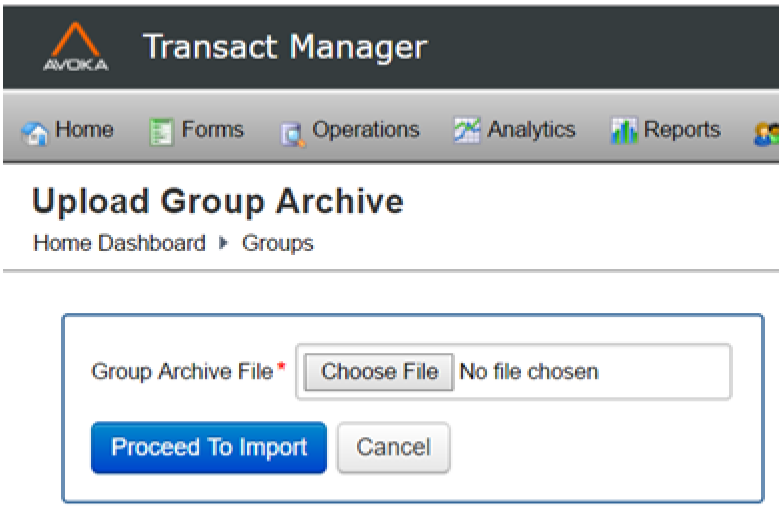
Import Groups

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:

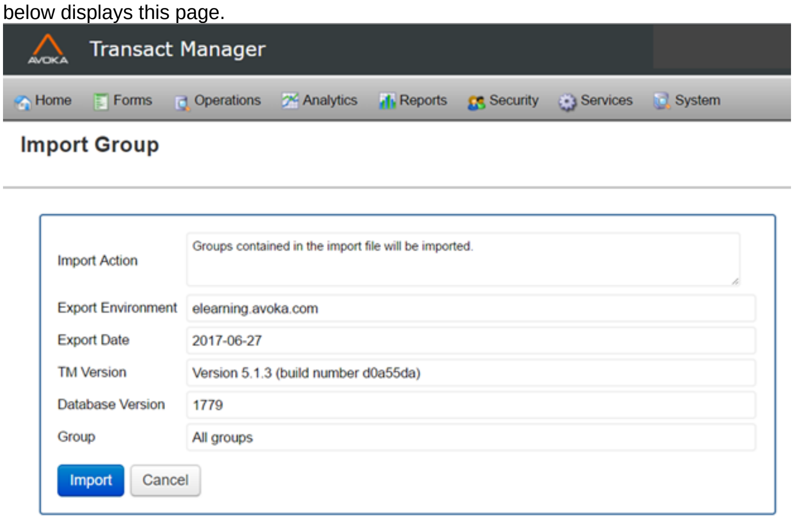
1. Navigate to *Security > Groups* from the menu bar.

2. Click the *Import* button.
   Clicking the *Import* button will direct you to the *Upload Group Archive* screen. The screenshot below displays this screen.



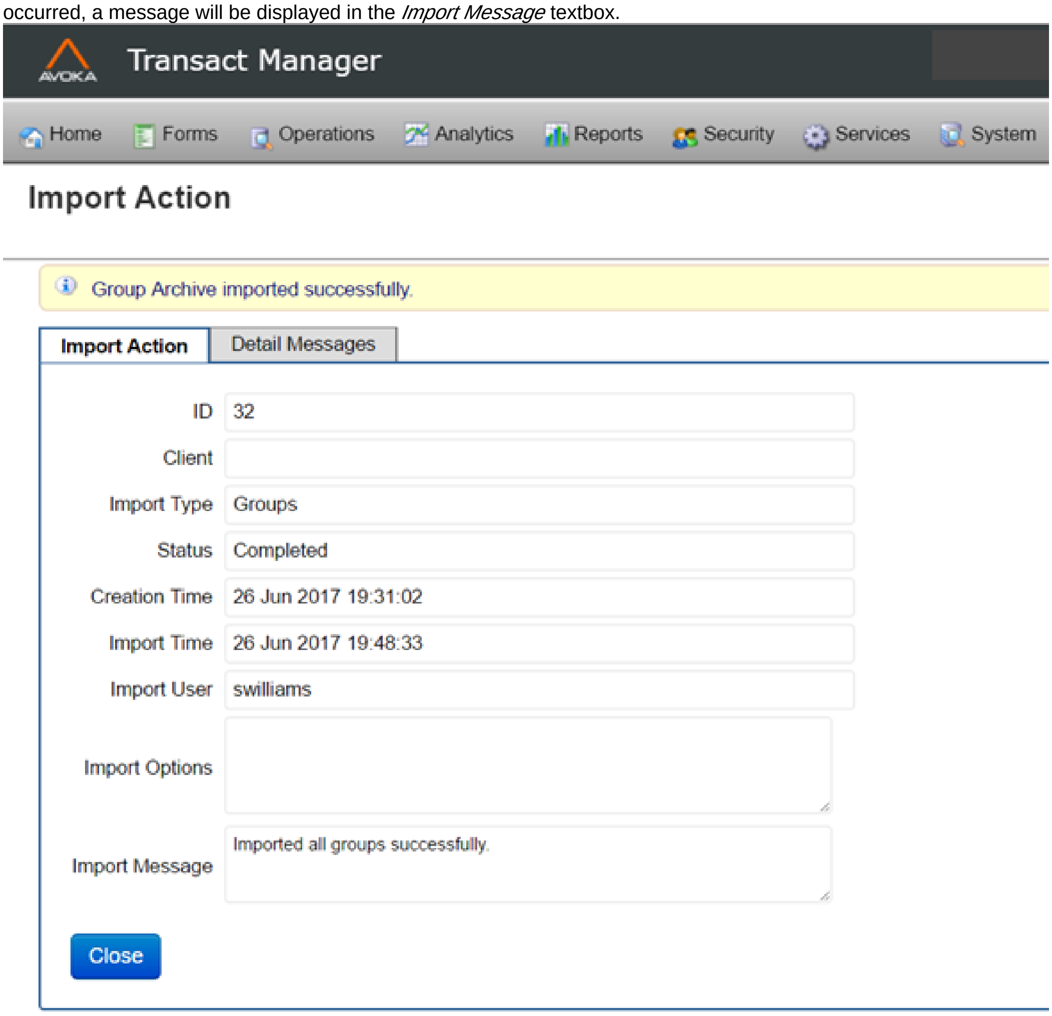
3. Click the *Choose File* button and select the zip file of the exported group/s from your computer.

4. Click the *Proceed To Import* button.
   Clicking the *Proceed To Import* button will direct you to the I*mport Group* page. The screenshot below displays this page.



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.



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 v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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.

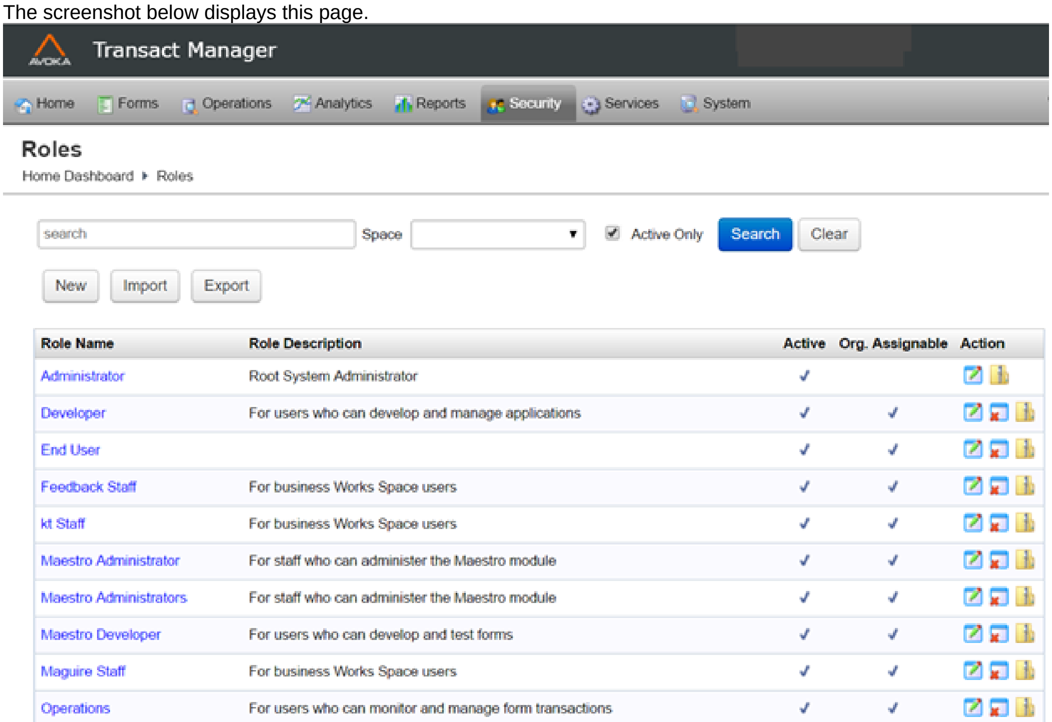
Export Roles

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.

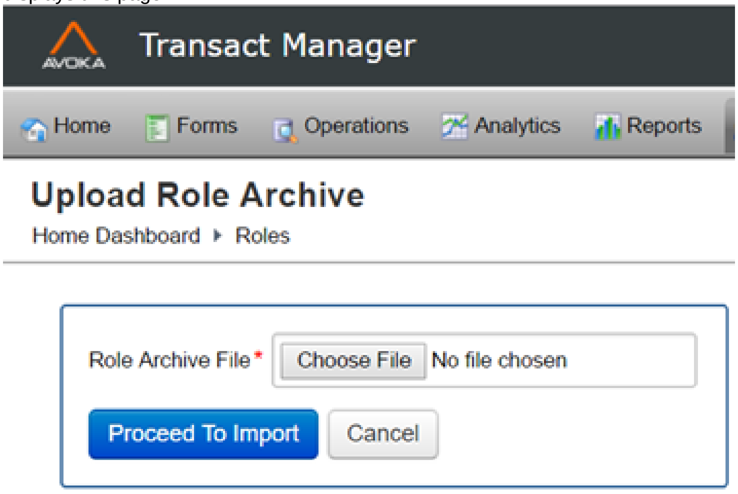
Import Roles

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:

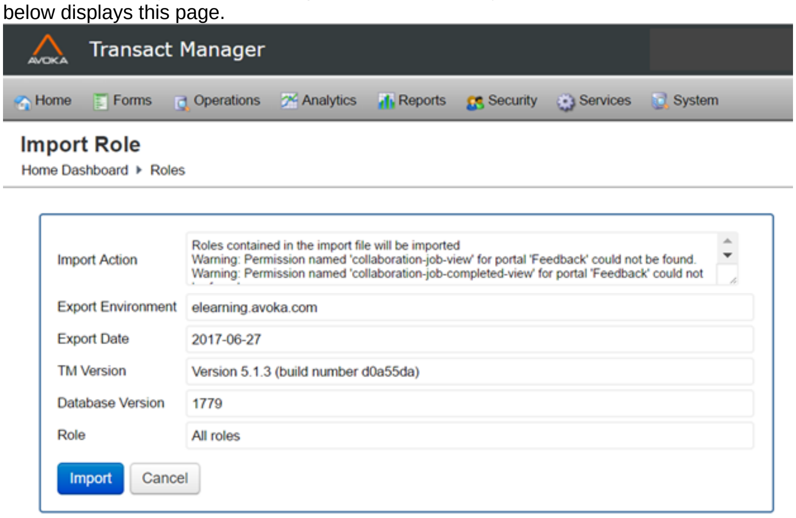
1. Navigate to *Security > Roles* from the menu bar.

2. Click the *Import* button.
   Clicking the *Import* button will direct you to the *Upload Role Archive* page. The screenshot below displays this page.

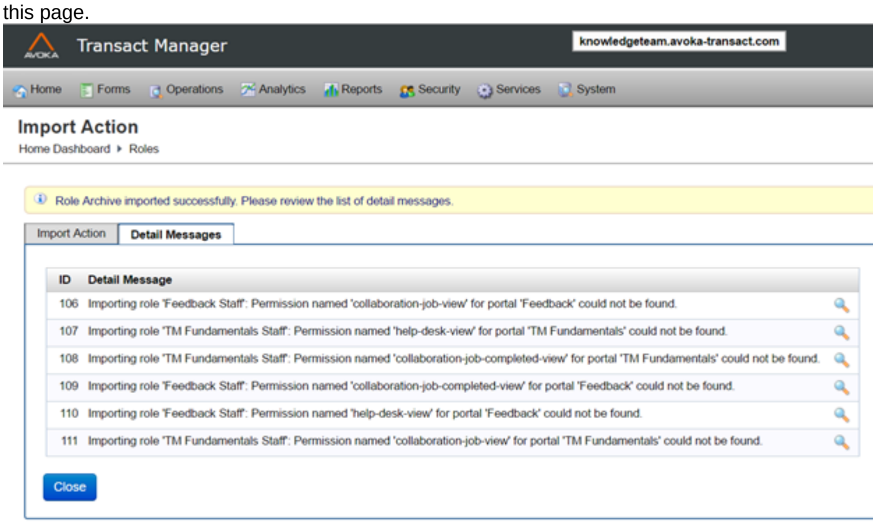


3. Click the *Choose File* button and select the exported role archive zip file

4. 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.



5. 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.



6. 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 v17.10)

Unknown macro: 'redirect'

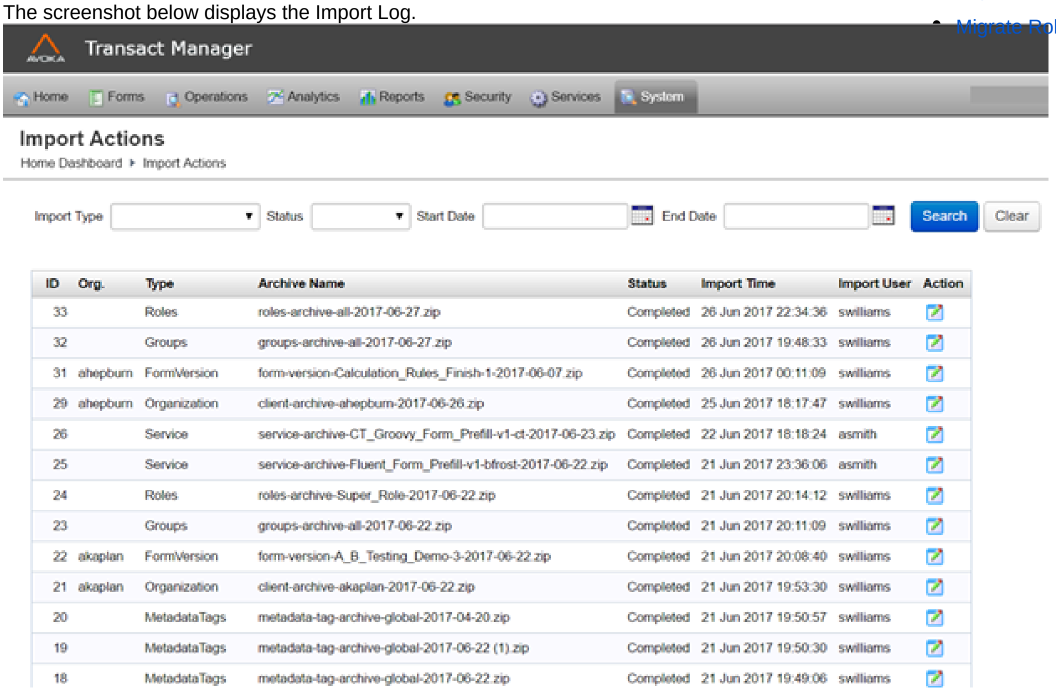
To facilitate tracking and auditing, Transact Manager keeps a log of all import operations that have been performed. This log keeps a record of the outcome of each import as well as any warning messages or issues that were encountered during the importing process.

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	
32		Groups	groups-archive-all-2017-06-27.zip	Completed	26 Jun 2017 19:48:33	swilliams	
31	ahepburn	FormVersion	form-version-Calculation_Rules_Finish-1-2017-06-07.zip	Completed	26 Jun 2017 00:11:09	swilliams	
29	ahepburn	Organization	client-archive-ahepburn-2017-06-26.zip	Completed	25 Jun 2017 18:17:47	swilliams	
26		Service	service-archive-CT_Groovy_Form_Prefill-v1-ct-2017-06-23.zip	Completed	22 Jun 2017 18:18:24	asmith	
25		Service	service-archive-Fluent_Form_Prefill-v1-bfrost-2017-06-22.zip	Completed	21 Jun 2017 23:36:06	asmith	
24		Roles	roles-archive-Super_Role-2017-06-22.zip	Completed	21 Jun 2017 20:14:12	swilliams	
23		Groups	groups-archive-all-2017-06-22.zip	Completed	21 Jun 2017 20:11:09	swilliams	
22	akaplan	FormVersion	form-version-A_B_Testing_Demo-3-2017-06-22.zip	Completed	21 Jun 2017 20:08:40	swilliams	
21	akaplan	Organization	client-archive-akaplan-2017-06-22.zip	Completed	21 Jun 2017 19:53:30	swilliams	
20		MetadataTags	metadata-tag-archive-global-2017-04-20.zip	Completed	21 Jun 2017 19:50:57	swilliams	
19		MetadataTags	metadata-tag-archive-global-2017-06-22 (1).zip	Completed	21 Jun 2017 19:50:30	swilliams	
18		MetadataTags	metadata-tag-archive-global-2017-06-22.zip	Completed	21 Jun 2017 19:49:06	swilliams	

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 v17.10)

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:

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.

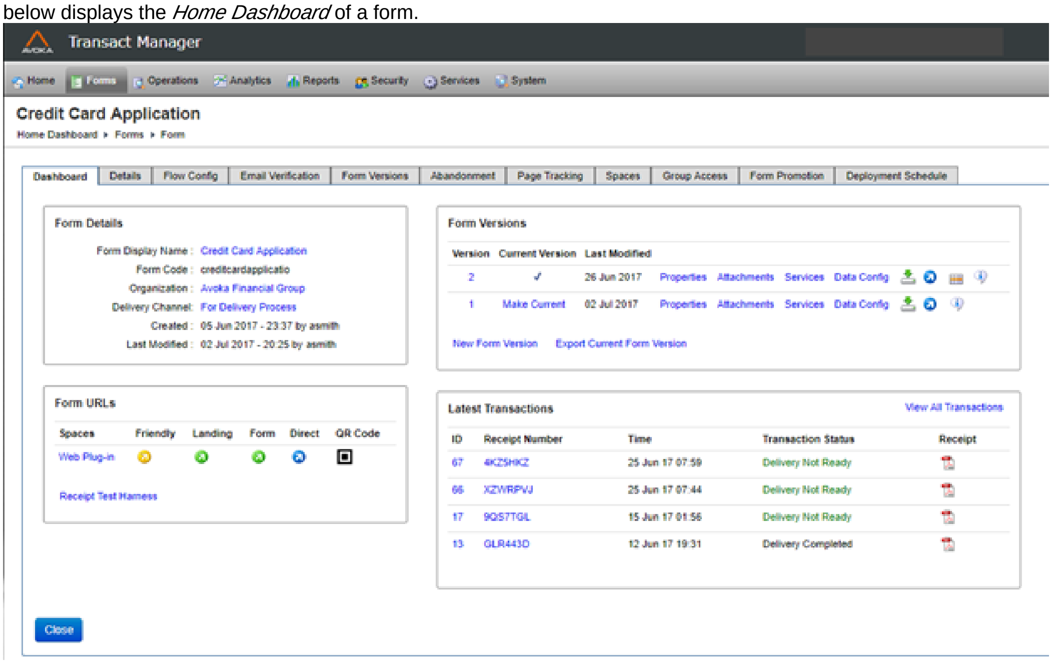
Test Mode allows a form's functionality to be tested whilst controlling how the form can and can't affect the selected TM environment. Transact Manager achieves this test mode feature by using a separate set of delivery channels.

> While a form is in test mode, any submissions made will not count towards an Organization's transaction count.

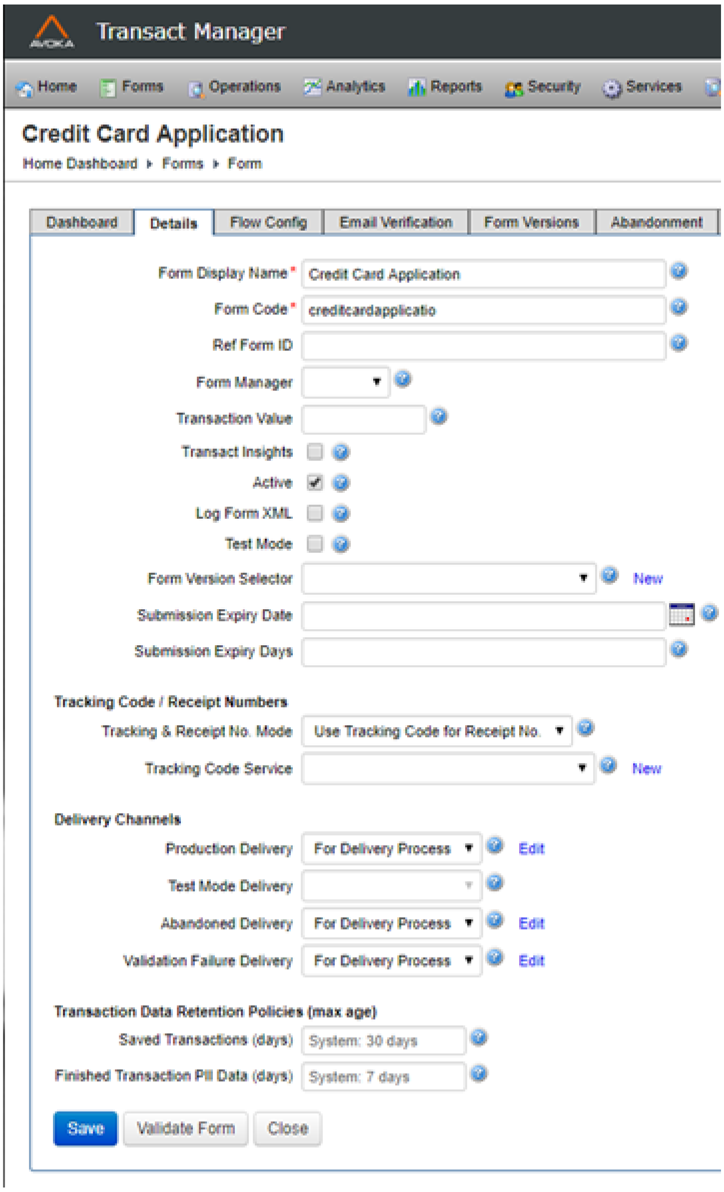
Apply Test Mode to a Form

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.



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.



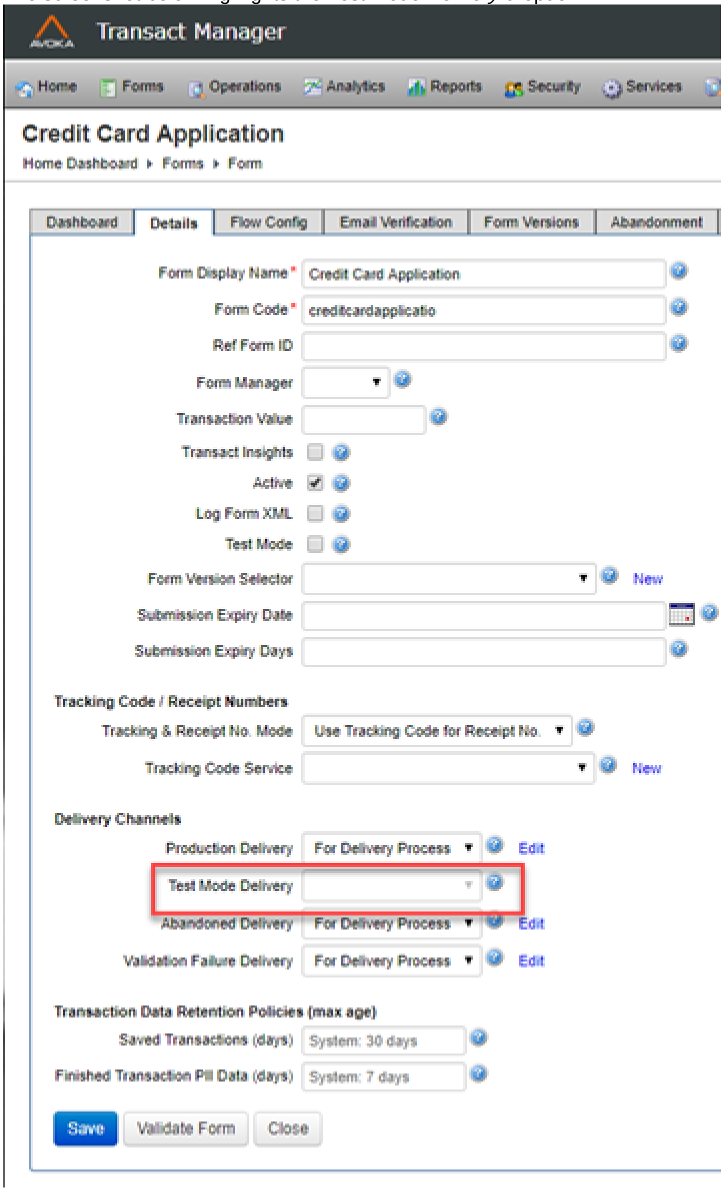
5. Select the *Test Mode* checkbox.
   Selecting this checkbox will activate *Test Mode* for the selected form. The screenshot below highlights the *Test Mode* checkbox.

6. 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.

7. Navigate to the *Delivery Channels* section of the page and select the appropriate *Delivery Channel* using the *Test Mode Delivery* dropdown menu.

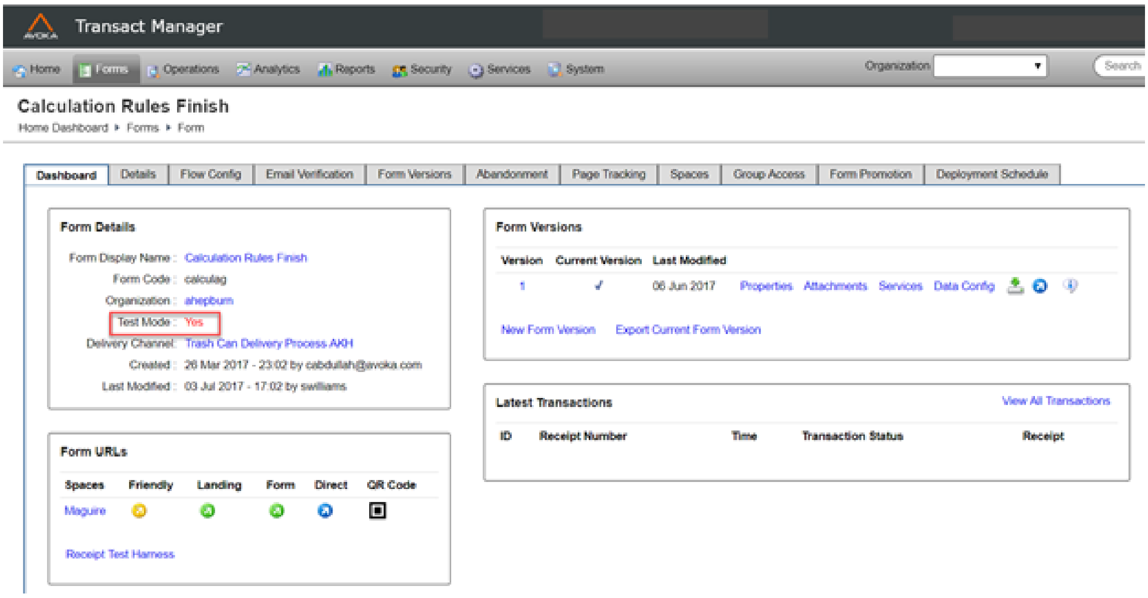
The screenshot below highlights the *Test Mode Delivery* dropdown.



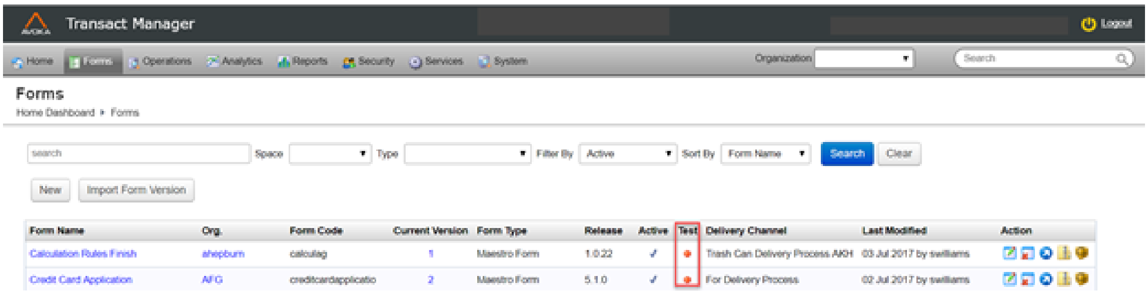
8. Click the *Save* button.
   Clicking the *Save* button will save the *Delivery Channel* associated with the *Test Mode.*

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.*



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.*



Server Nodes (Manager v17.10)

Unknown macro: 'redirect'

The content within this section covers information relating to server nodes in Transact Manager.

The list below identifies the topics covered within this section.

- Introduction to Server Nodes (Manager v17.10)
- Update a Server Node (Manager v17.10)
- Add a Server Node (Manager v17.10)
- Delete a Server Node (Manager v17.10)
- Monitor Space Server Performance (Manager v17.10)

Introduction to Server Nodes (Manager v17.10)

Unknown macro: 'redirect'

Page Contents:

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)

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. Receipt generation is handled, by default, by an individual server node.

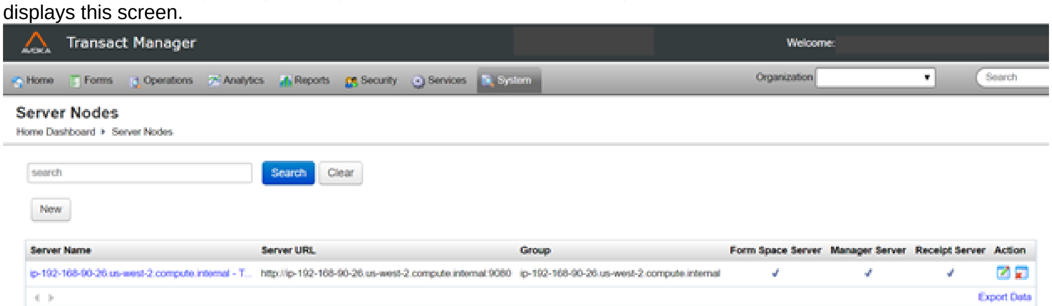
Transact Manager creates default server nodes when it is initially installed. For example, a server node dedicated to PDF receipt generation is created when Transact Manager is installed. Though these server nodes are installed automatically, it is still important that you confirm the configuration settings 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 *Server Name* column, refer to *Update a Server Node* section)
	Delete (before choosing to delete a user account please refer to *Delete a Server Node* section)

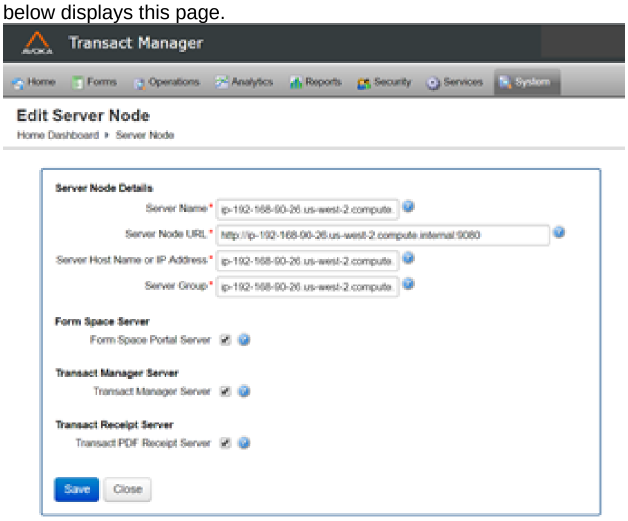
If you wish to export the list of server nodes to an Excel spreadsheet, click the *Export Data* link at the bottom of the list of server nodes.

Update a Server Node (Manager v17.10)

Unknown macro: 'redirect'

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.
   

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.

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 (Manager v17.10)

Unknown macro: 'redirect'

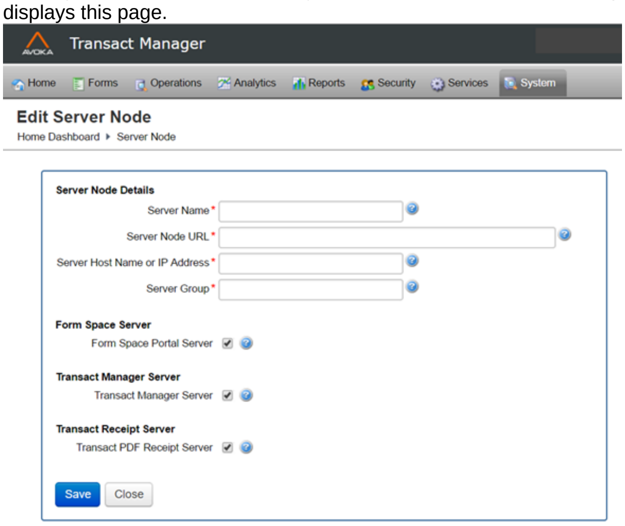
Related Pages:

- 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.
   

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 v17.10)

Unknown macro: 'redirect'

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.

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)

Monitor Space Server Performance (Manager v17.10)

Unknown macro: 'redirect'

Related Pages:

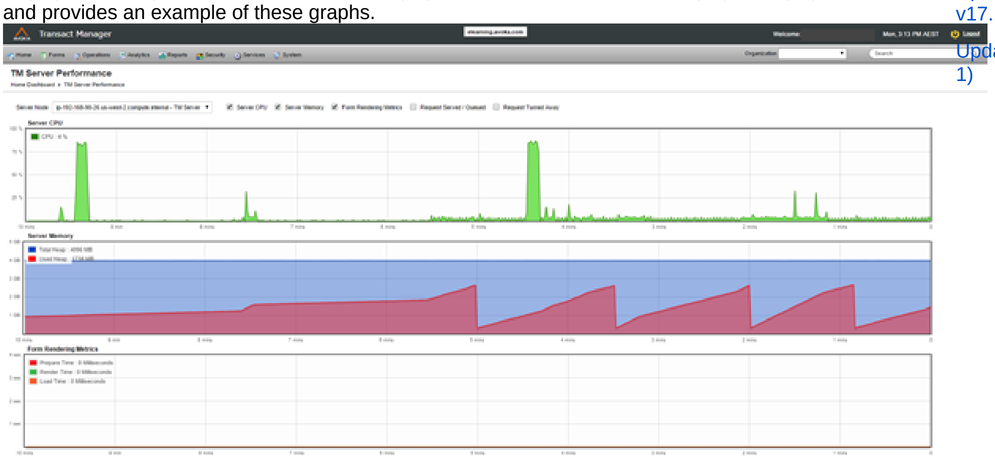
Monitor Space Server Performance

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 the 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 v17.10)

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 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.