# OCS & MOTD Editor Suite

# Software Installation and Operation

Run the setup/installer from your installation CD or FTP site.

**Note:  Everbrite software can run in a Microsoft Windows "limited" user account, but administrator privileges are required for installation.**

## Initial Software Configuration

After software installation, the OCS Editor program will start automatically or click Start > Programs > Everbrite OCS Editor Suite > OCS Editor.

If the software is not yet configured, a popup window will appear (see figure right) informing the user that the OCS Update Utility needs to run to define connections.  This utility will configure how the software will communicate with the OCS.
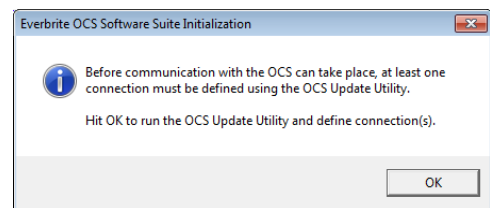
Click OK to load the OCS Update Utility program.

**Connection Setup Wizard**

Serial or network connections can easily be defined by using the Connection Setup Wizard. The wizard will start automatically if no connections are defined or click the "Connection Setup Wizard" button on the Settings tab.
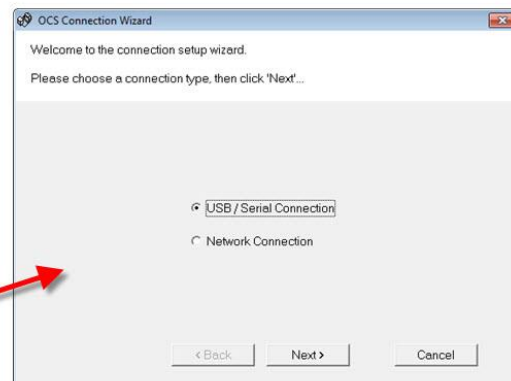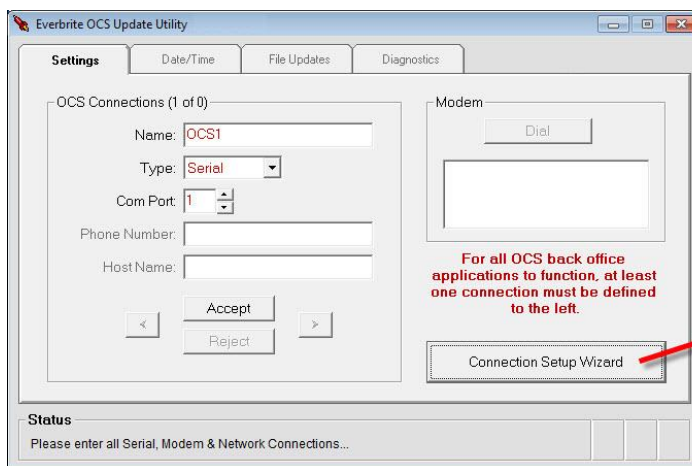
## Defining Serial Connections

Start the Connection Setup Wizard, choose "USB / Serial Connection" and then click "Next".

Use <u>one</u> of the following connection methods:

1. Use a USB cable to connect the converter's "USB" port to the PC's USB port
2. Use a serial cable to connect the converter's "From PC" port to the PC's serial port or USB-serial adapter

<span style="color:red">Make sure that any the drivers are loaded for any USB devices in use.</span>  Click "Next.
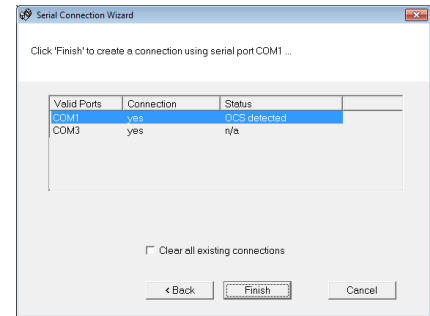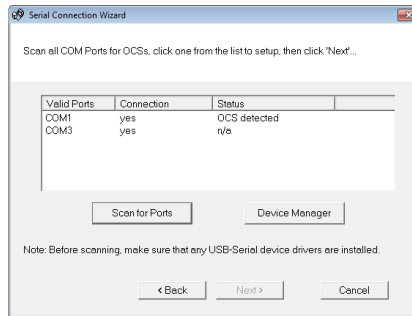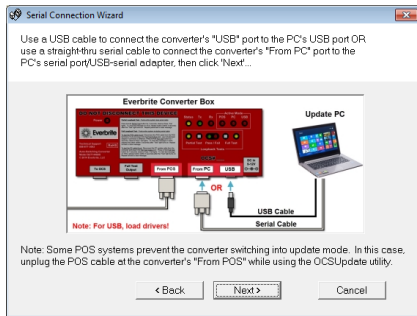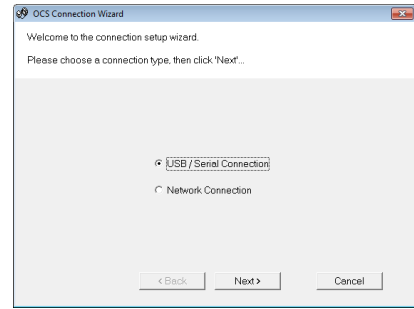
Click "Scan for Ports" to scan for available serial ports on the computer.  If everything is connected and functioning correctly, an OCS will be detected on a port.  Click this port and then click "Next".  To create a connection for this OCS, click "Finish".

## Defining Network Connections

Start the Connection Setup Wizard, choose "Network Connection" and then click "Next".

Click "Scan for OCSs" to scan the local area network for connected OCSs.  Click the OCS in the list that is to be modified or selected and then click "Next".

Note: When an OCS is selected, click "Identify OCS" to popup an identifying message on the screen outside.  This is useful for identifying two OCSs with similar settings; the units can then be renamed with more descriptive names.

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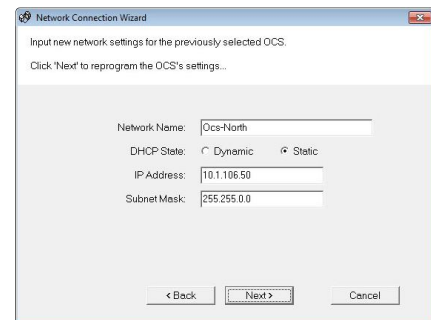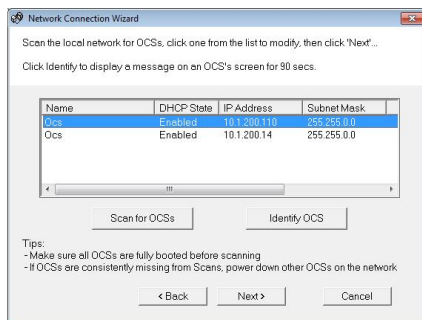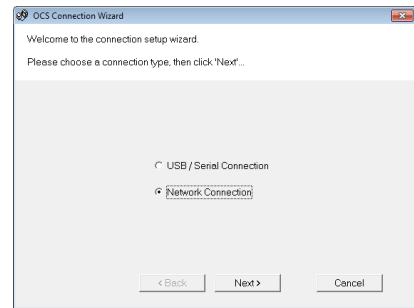
The network settings on the selected OCS can now be modified.  Make any changes necessary and then click "Next".  If changes have been made, the wizard will indicate whether the changes were successful.
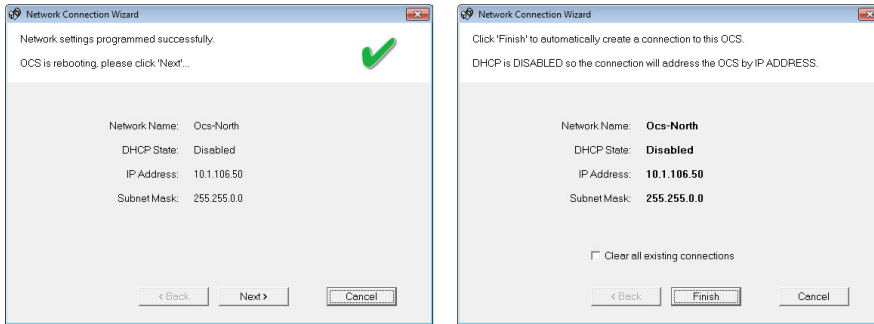


To create a connection for this OCS, click "Finish".

## Setting the OCS Date and Time

When uploading new configurations/images using the OCS Editor, the date/time on the OCS will automatically be changed to the date/time of the host computer (where the software is running).



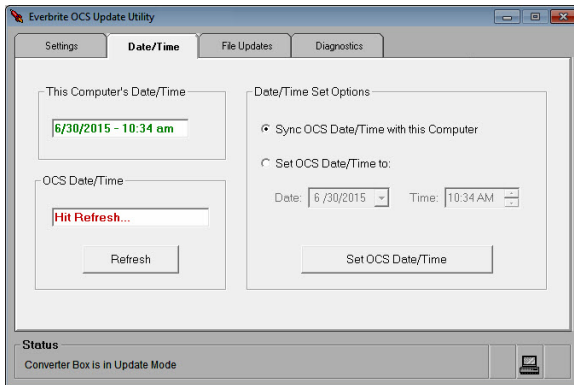To change the date/time manually, run the OCS Update Utility program by clicking Start > Programs > Everbrite OCS Editor Suite > OCS Update Utility.  When the program is running, click on the "Date/Time" tab (see figure right).

To see what time the OCS is set to, click the "Refresh" button.  The OCS date/time will be displayed in the "OCS Date/Time" box in red.

To set a new date/time, click either "Sync OCS Date/Time with this Computer" or "Set OCS Date/Time to:" and then manually select the new date/time using the controls.  Once you pick an option, click the "Set OCS Date/Time" button to perform the task.

**This concludes the installation of the back office software.  For further details on use of the software, continue below.**

## OCS Editor Operational Details

This application is used to determine the way your OCS looks to the customer and its configuration. The number of dayparts, images shown at slideshow, order pad color scheme, scrolling text and much more are the settings that can be set through the Editor. Once the look is set up, images and setup files are saved and sent to the OCS.

### How to use the Editor

There are two types of tabs to work from: a General settings tab and five Daypart settings tabs. Dayparts are simply periods of time which contain a common theme (example: breakfast, lunch, dinner). Here are the basic features of each type of tab:

### General Tab settings

- **Update Configuration and Images** – This section loads a new configuration (settings & images) into the Editor software. The choices are to download the latest factory configuration from Everbrite (requires a configured internet connection) or to revert the configuration back to the shipping installed defaults.

- **Lookup Table file** – This is a file that can link short POS item descriptors to longer, more customer friendly descriptors. For example if your POS uses "HB" as a descriptor, the table can substitute the words "Single Hamburger" to the customer. Everbrite can assist in creating this file for your specific requirements.



- **Popup Table file** – This type of table allows for sophisticated pop up graphics like suggestive selling, last item ordered images and condiments/selections images. Everbrite can assist in creating these files for your specific requirements.
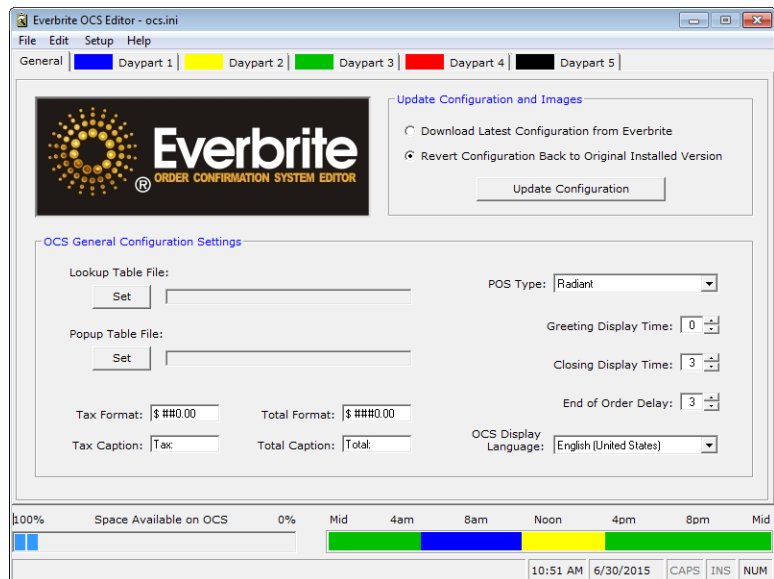
- **POS Type** – Use the drop down selector to choose the POS system you have. Refer to your POS supplier to make sure it is sending out data to the OCS.

- **Greeting Display Time** – If a greeting display is set from any of the daypart tabs, it is held for the number of seconds set in this field, after a car trips the loop detector. If set to 0, then the image stays up until the order starts.

- **Closing Display Time** – This is the amount of time in seconds that the closing image is held on the screen.

- **End of Order Delay** – This is the amount of time in seconds that the order pad will hold after the order has been totaled.

- **Tax and Total Formats** – This is a format for how the numbers look on the order pad. If these need to be reset, use Edit > Restore Formats.

- **Tax and Total Captions** – These are the actual words placed in front of the amounts on the order pad.

- **OCS Display Language** – The language which the OCS will display text in.

**Daypart Tabs**
Click on the first daypart tab to start. This tab is where the look of the OCS is developed. The look can be changed by daypart time periods (breakfast, lunch, dinner, etc.). The time of the daypart is set and images and colors are selected. Up to five images can cycle for the slideshow for each daypart and up to five dayparts can be defined. Each set of dayparts defines a 24-hour period.

**Note the color-coded daypart at a glance at the lower right corner of the screen. This allows you to see what time of day each daypart falls into and how many dayparts are set by color.**
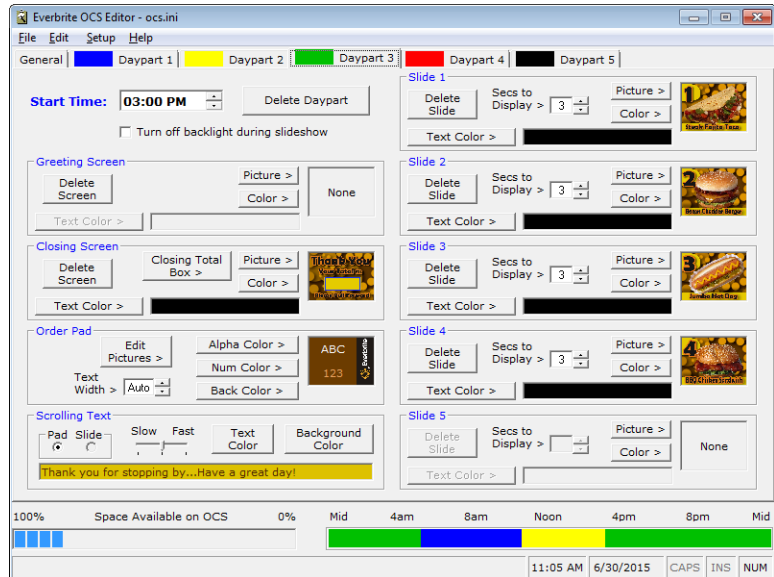
- **Start Time** – This is the time of day this daypart will begin. It will continue until another daypart is set or the day starts over.

- **Delete Daypart button** – You must have at least one daypart but if you want to remove a complete daypart setup, use this button.

- **Greeting screen** – This is a screen that interrupts the slideshow when a car pulls up to the drive thru. This holds for the amount of time set on the General tab. You can load an image with or without overlay text or a solid color with text overlay. Enter the text in the box next to the text color button. **Note: You must have the converter box connected to an extra output from the drive thru microphone loop detector to use this feature.**

- **Closing screen** – This screen is displayed after the order is totaled. You can set an image to display or use a solid color. To have the order total display, use the Total Box button to select exactly where on the image you want the total amount to be displayed. If you want text to display in front of the amount, enter it in the box next to the text color button. To change the total font color, use the text color button.

- **Order pad** – This is where the customer's order is displayed. You can set the background color and descriptor (alpha) text

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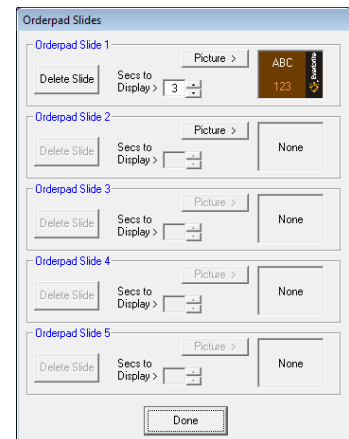
color and numeral colors.  Use colors with high contrast like black and white for best readability.  You can set a single image or image slideshow on the order pad (see figure right).  If the image is 1024x768 pixels in size, it will be displayed behind the text and cover the entire order pad.  If you use an image that's between 100 and 614 pixels wide by 768 pixels high, the image will be displayed on the right side of the screen and the order text will automatically scale to the remaining area.

- **Scrolling text** – Scrolling text can be set on the order pad or on a slideshow with only one image.  Use the radio button to select which scrolling text to enter (Pad or Slide). Enter the text to scroll across the bottom of the screen in the box provided.  You can also display today or tomorrow's Message of the Day in the text box by clicking Edit > Insert Today's Message or Insert Tomorrow's Message.  Set the text and background colors using the appropriate buttons.  Use high contrast colors like black and white.  Set the speed using the slider bar (slow 1, medium 2 or fast 3).

- **Slides 1 - 5** – Select an image with or without overlay text or a solid color with overlay text.  Select the hold time in seconds for each image in the slide show.  If slowdown in the drive thru during busy times is a concern, use just a single image for those busy times. You can also display today or tomorrows Message of the Day in the text box by clicking Edit > Insert Today's Message or Insert Tomorrow's Message.

**Add more Dayparts as Needed**
Click on the next tab and click the "Add Daypart" button. Note that only the next unused daypart can be added (see figure right).
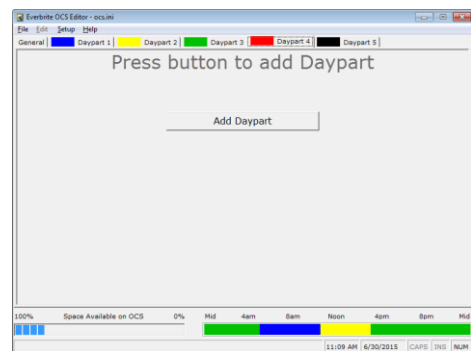


**File Menu**
- File > Save – Saves any changes that are made to the configuration

- File > Download – Sends the configuration to the OCS

- File > Exit - Closes the application

**Edit Menu**
- Edit > Insert POS Message – Inserts a variable which will be replaced by a POS-transmitted greeting message (this option appears only with certain POS systems).

- Edit > Insert Linefeed – Use this to skip to a new line when editing slide overlay text

- Edit > Insert Today's Message – Inserts a variable which will be replaced by today's Message of the Day (see Building Messages in the OCS Editor).

- Edit > Insert Tomorrow's Message – Inserts a variable which will be replaced by tomorrow's Message of the Day (see Building Messages in the OCS Editor).

- Edit > Restore Formats – Use this on the General tab to set the Tax and Total formats to the default settings

**Setup Menu**
- Setup > Update OCS Software – Checks the OCS software to make sure that it is compatible with the current OCS Editor feature-set and updates if needed.

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- Setup > Modify OCS Connections – Loads the OCS Update Utility which is used to define all connections (serial, network and modem) to the OCS.

- Setup > Editor Options – The Download Mode options can save time updating the OCS.  "All" will send the entire configuration to the OCS every time a change is made.  "All Next Time" will send the entire configuration during the next download and then only changes after that.  "Only Changes" will send only the changes that have taken place between download sessions.  **Note: It is highly recommended to keep this setting at "All".**
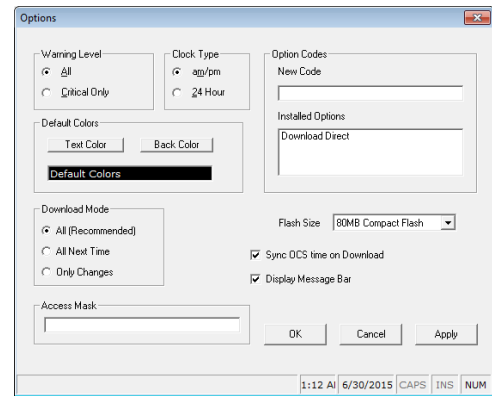
**Help Menu**
- Help > Check for Updates… – Checks for software updates via the Web.  Note: The application will automatically check for updates daily without user intervention.

- Help > About – Displays information about the application


**Sending Changes to the OCS**
Once changes to the General and Daypart tabs are complete, the changes need to be sent to the OCS.  To save the changes to disk, move the mouse to the menu bar and click File > Save.  To send those changes out to the OCS click File > Download.  Depending on the number of images and the connection type, the file transfer will take a while to complete (a progress bar will show the relative progress of each file).

## MOTD Editor Operational Details

The Message of the Day (MOTD) application allows you to define a set of changing, daily messages which can be displayed on the OCS.  Specifically, the messages can appear:

- In front of the solid background color of a slide or greeting screen
- In front of the image used for a slide or greeting screen
- Inserted into the scrolling text of the orderpad or slide

The user has access to both today's message as well as tomorrow's message.

### Building Messages in the OCS Editor

When the OCS Editor application is running and the user clicks in a text box where a message can be inserted (see bullets above and figure right), the Insert Today's Message and Insert Tomorrow's Message choices will be enabled in the Edit menu.
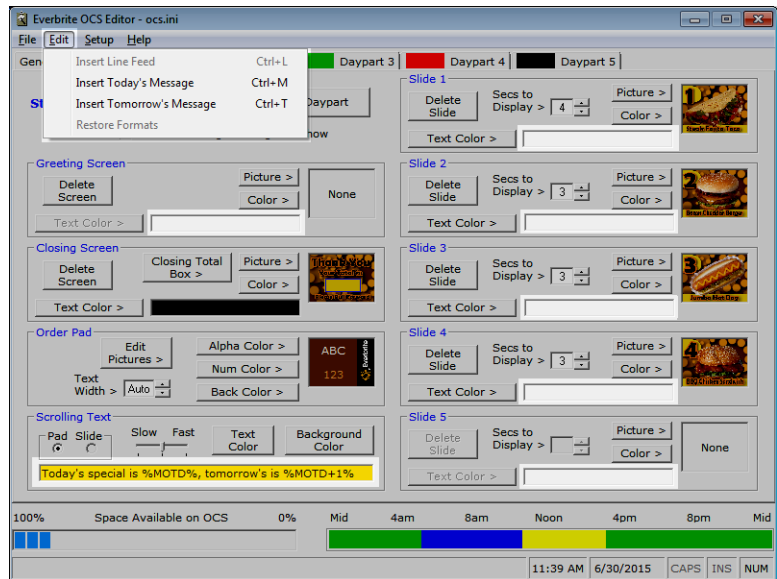
When the today's message or tomorrow's message is inserted into a text box, the characters %MOTD% or %MOTD+1% (respectively) will appear.  These phrases can be thought of as "fields" or "variables" that will be replaced with the dated messages built using the MOTD Editor later.

**Note:  After MOTD messages are set, make sure to download changes to the OCS.**

### How to use the MOTD Editor

This application actually builds the dated message database which gets stored on the OCS.  These messages are inserted into the MOTD variables defined above.

The first thing to do when building a new database is set the **Start Date** which defines the starting date of the database.  Once the database is started, this option doesn't appear (it appears to the right for clarity).
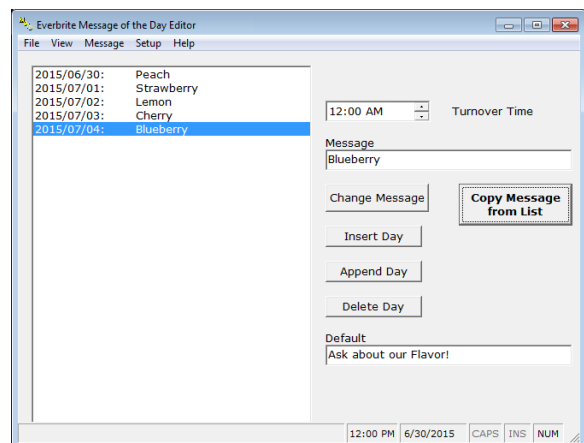
The **Turnover Time** defines the time at which the messages will switch from one day to the next.  This is usually set at midnight or set to the store closing time if after midnight.

The **Default** message is the message that will be used if the OCS encounters a date where there is no message defined.  For example, if the specials for August are in the database on the OCS and the actual date is in October, the OCS uses this default message.

The **Message** box contains the message that can be associated with a date and is used with other controls to perform various functions:

1. **Change Message** – Change a day's message by clicking the day in the left window, typing the new message in the **Message** box (or copying it from the list) and hitting this button.  If the day in the left window is double-clicked, its message will appear in the **Message** box for editing.

2. **Insert Day** – Insert a day before another day in the database by clicking the day in the left window, typing a message in the **Message** box (or copying it from the list) and hitting this button.

3. **Append Day** – Append a day onto the end of the database by typing a message in the **Message** box (or copying it from the list) and hitting this button.

4. **Delete Day** – Delete a day by clicking the day in the left window and hitting this button.

5. **Copy Message from List** – This button will bring up a predefined list of messages that the user can create and edit.  When a message in the list is selected, it will appear in the **Message** box where the above operations can be performed (see *Using the Message List Below* for details).

## Using the Message List

The message list is a predefined list of messages that were either installed with the software and/or that the user can create and edit.  This feature makes building a database faster since the user doesn't have to type messages in each time – just copy them from the list.

**Select a Message** - To copy a message back to the main editor, click a message in the left window and click **OK** (or hit **Enter**) or just double click the message.

**Change a Message** – To change a message, click a message in the left window and click **Change**.  When the message is complete, hit **Enter**.

**Add a Message** – To add a message to the list, click the **Add** button and type in a message.  Hit **Enter** when the message is complete.
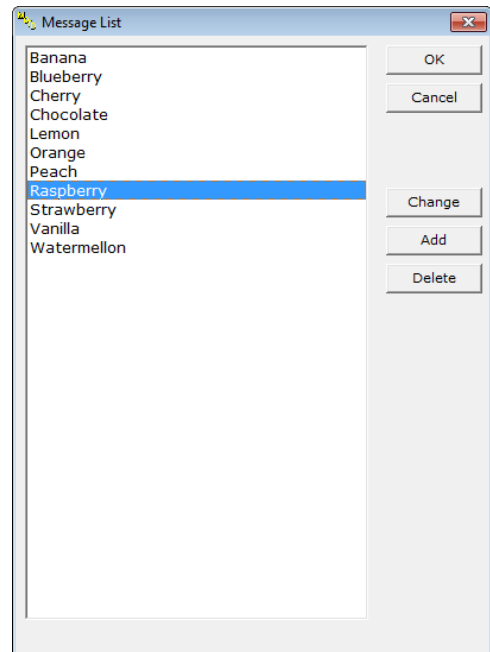
**Delete a Message** – To delete a message, click the message in the left window and click the **Delete** button.

Here are the menu options in the MOTD Editor:

**File Menu**
- File > Print – Prints the message database
- File > Download – Sends the message database to the OCS
- File > Exit - Closes the application

**View Menu**
- View > Font Smaller – Reformat the window with a smaller font
- View > Font Larger – Reformat the window with a larger font
- View > Calendar – View and edit the message database using a calendar format

**Message Menu** (these functions are identical to the buttons in the main window)

**Setup Menu**
- Setup > Editor Options – Options such as whether the OCS time is synchronized during a download and how to delete obsolete database history.

**Help Menu**
- Help > Check for Updates… – Checks for software updates via the Web. Note: The application will automatically check for updates daily without user intervention.
- Help > About – Displays information about the application

**Sending the Database to the OCS**
The database must reside on the OCS in order to be used. To send the database out to the OCS click File > Download.

## OCS Update Utility Operational Details

This program handles the actual transfer of files and commands to the OCS.  It is invoked by the OCS Editor or an individual (primarily a service technician) since all settings can be set on the OCS by using the Editor application.  The OCS clock can be set through the OCS Update program.  OCS Update must be run first on a new install to set up how to communicate with the OCS.

**Settings Tab**
There are three different Types of connections that can be used to talk to the OCS: Serial, Network and Modem.  All connections can be given arbitrary Names to define the connection (like *OCS East* or *Main OCS*).  Serial connections require a COM port, Network connections require a Host Name and Modem connections require a COM port and Phone Number.

Multiple connections can be defined for quick access using the right and left arrow buttons.  The current connection will be displayed near the top of the screen (see figure right showing connection 1 of 1, named "OCS1" as a COM1 Serial connection).

Connections can be added automatically by using the "Connection Setup Wizard" button.  They can also be added or deleted manually by using the "Add" and "Delete" buttons.  While editing a connection, these two buttons will change to "Accept" (save changes and exit edit mode) and "Reject" (discard changes and exit edit mode).
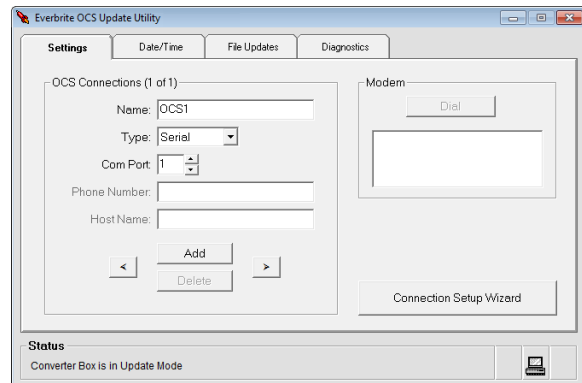
**Date/Time Tab**
This tab allows you to set and get the OCS date and time.  To see the current date and time of the OCS, click the "Refresh" button.  To set the OCS to the current time of the PC the update application is running on select "Set OCS to Local System Date/Time" and then click "Set OCS Time/Date".  Alternately, if you want to set the sign manually select "Set OCS Date/Time to:" and enter the appropriate date/time and then click "Set OCS Time/Date".
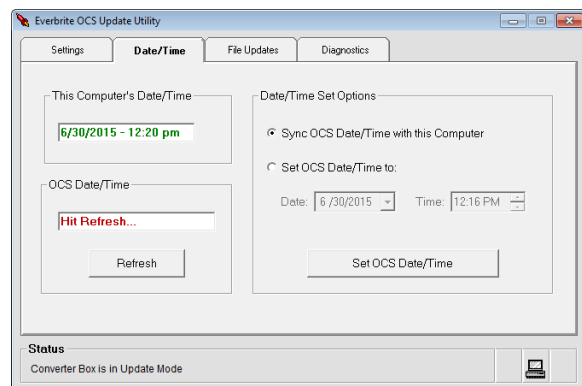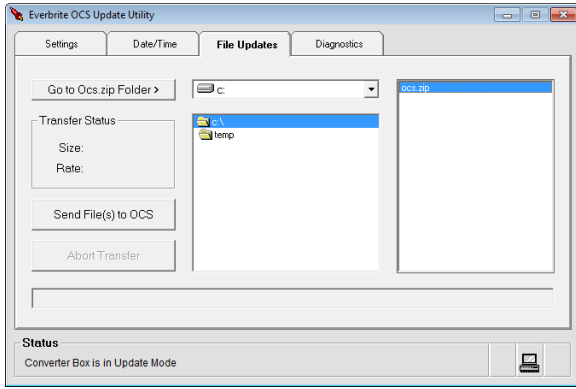
**File Updates Tab**

This tab allows you to browse the PC to locate files to send to the OCS. This application is only used in trouble shooting or other updating instances. It is best to let the editor handle how and when updates are sent to the OCS.

Use the drive, folder and file controls to navigate to the file that needs to be transferred to the OCS. Click on the file and click then the "Send File(s) to OCS" button.

**Diagnostics Tab – System Information**

This tab allows you to check various hardware related information about the OCS. Click on any of the "Get" buttons to return information on that particular piece of hardware. This information may be helpful to Everbrite Technical Support personnel.
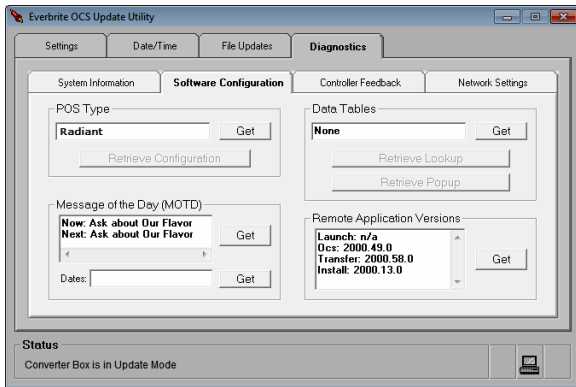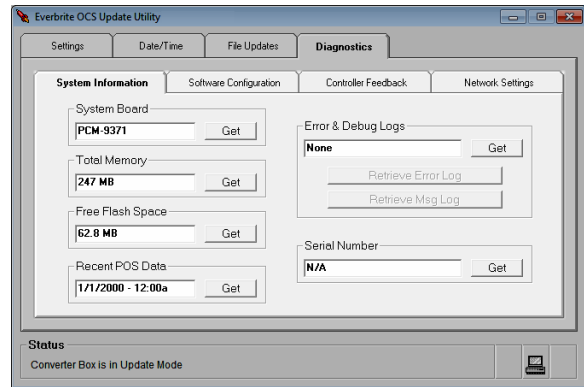
**Diagnostics Tab – Software Configuration**

This tab allows you to check various software related information about the OCS. Click on any of the "Get" buttons to return information on that particular piece of hardware. This information may be helpful to Everbrite Technical Support personnel.
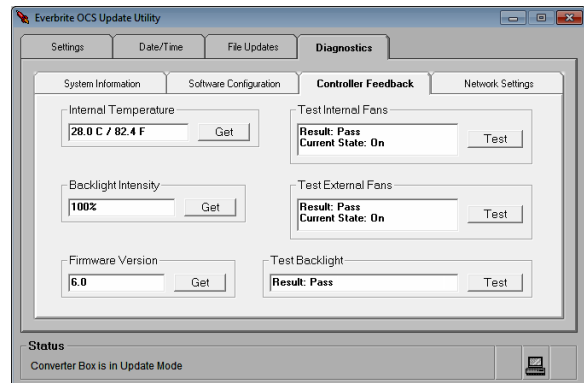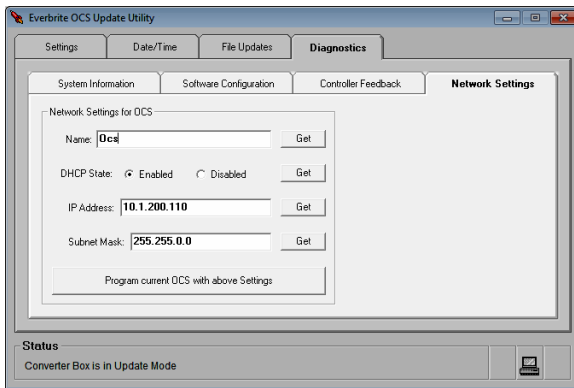
**Diagnostics Tab – Controller Feedback**

This tab allows you to check various hardware related information and run diagnostics tests on the OCS. Click on any of the "Get" or "Test" buttons to return information on that particular piece of hardware. This information may be helpful to Everbrite Technical Support personnel.

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**Diagnostics Tab – Network Settings**
This tab allows you to get and set all network-related settings on the OCS. Click on any of the "Get" buttons to return information on that particular setting. The factory defaults of an OCS are generally a Network Name of "OCS" and DHCP enabled.

**Note: Generally, it is much easier to use the Connection Setup Wizard from the Settings tab to modify network settings. Using the wizard is the recommended method for network setting modification.**

To manually change the current OCS's network settings, type a valid (computer) name and choose the DHCP state. If DHCP is disabled, a static IP Address and Subnet IP Mask need to both be defined. When all settings are verified, click "Program current OCS with above Settings" to send them to the OCS.

**Program Updates**
Right-click on any tab to check for software updates via the Web. Note: The application will automatically check for updates daily without user intervention.



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