

**Oracle® Retail Convenience and Fuel Point of  
Service**

Installation Guide  
Release 132K

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Oracle Retail Convenience and Fuel Point of Service, Installation Guide, Release 132K

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Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
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# Preface

This Installation Guide describes the requirements and procedures to install this Oracle Retail Convenience and Fuel Point of Service release.

## Audience

This Installation Guide is for the following audiences:

- System administrators and operations personnel
- Database administrators
- System analysts and programmers
- Integrators and implementation staff personnel

## Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.3) or a later patch release (for example, 13.3.1). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

## Conventions

**Navigate:** This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

This is a code sample

It is used to display examples of code

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# Introduction

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**Note:** The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names and companies that MICROS acquired may exist throughout this existing documentation set.

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This document covers the install of a Lucas system, using Lucas 2.8.1 Fuel Build 125. Fuel build 125 is functionally the same as Fuel build 97, with all software updates to N. Installation is onto imaged PCs, which have the correct IP addresses set, machine names etc.

The installation process has been simplified as much as possible, and configuration for specific hardware platforms has been automated in the install.

Further, the TACT configuration tool has been automated as far as possible, so for example when specifying an EFT system, settings suitable for that system (details such as loyalty processing, de-faults for that EFT system, settings etc. ) are automatically applied.

## Installation Files

The version being installed should be placed in C:\Install\Lucas, on the PC that will be the BOS. Folder name is LU\_2\_8\_1\_1069\_FUEL\_2\_1\_125

There are 3 files that need to be correct for a successful installation. C:\Install\Lucas\LU\_2\_8\_1\_1069\_FUEL\_2\_1\_125\Disk1\InstData\lct\_default.zip This file contains all the customisation needed for database, property files etc. C:\Install\Lucas\LU\_2\_8\_1\_1069\_FUEL\_2\_1\_125\Disk1\InstData\config???.xml

This file defines the number of workstations, their IP addresses, the Company, Store, Workstation numbers etc. Defaults are available

C:\Install\Lucas\LU\_2\_8\_1\_1069\_FUEL\_2\_1\_125\Disk1\InstData\Windows\NoVM\installer.properties

This file contains (if required) database instance, user and passwords required for the installation.

The correct lct zip file, default config xml files and a pre-set installer.properties are in the installation folder, but see Installation Files document for further details

## IP Address, Machine Name

Work out the IP Addresses that you will be using for this installation. You can use defaults, unless the system has to be part of a pre-existing network in some way, such as for internet connectivity (required at the BOS, and possibly POS1 for ACK, or other EFT solutions) but the IP Addresses used must be in the config.xml you use when installing.



## Images

Images have been prepared for different hardware platforms.

For the UK the BOS image is for an HP RP5700 with Windows XP Service Pack 3 and also has Prism SQL. The machine name is BOS, and the default IP Address is 192.168.0.20.

This image is not sysprepped, the license is a downgraded Vista OEM key

There is an alternative version with Windows Server 2008, 64bit for use on larger sites, e.g. convenience stores with 8 + POS workstations

The POS image is for an ELO 15D1, using Windows XP SP3. Machine name is POS1 and IP Address is 192.168.0.101. The image is sysprepped, and requires a license key entered at first start-up, followed by activation.

The images have installed SOE toolkits, SQL server and Java, and should be ready to install Lucas immediately.

## User Accounts

In both images there are two user accounts, Administrator password "logware2001", and POS password "torexretail". Both accounts are administrators, but the POS user is set to log on automatically. Lucas is installed from the POS user account.

## Sysprep

UK POS image for ELO 15D1 have been sysprepped so at first start-up they required acceptance of the EULA and entry of OEM license key, which should be attached to the case. Ideally they should also have Windows activated.. The POS user account should have been set in staging to log on automatically

## JPOS

This release of Lucas includes all the jpos drivers and jpos.xml entries. If you were using an older image, the jre adds used previously need removing. There is a batch file available to do this in the release folder – remove-jre-add.bat, which must be run on all POSs.

## Time and Date

Time and especially date is very important for Lucas operation.

An application, TARDIS, has been installed as a Control Panel applet. A BOS acts as the time server, and POSs are set to take their time from that server.

The configuration for this has been done on the assumption of using the default IP address structure. This will need to be modified in the TARDIS applet on BOS and all POSs when using non-standard IP addresses for the installation.

Please make sure that all workstations are on the correct date and time before starting installation.

To prevent users accidentally or even deliberately changing the system date and time, A group Policy should have been set on the BOS to prevent this via Control Panel, System Tray or command prompt. You can override this (to set the system initially) by setting the date and time in the BIOS

## Group Policy Setting

Start / Run gpedit.msc

Select Computer Configuration / Windows Settings / Security Settings / Local Policies / User Rights Assignment / Change the System Time: (Double Click)

Remove Administrators and Power Users (the defaults) and OK Reboot the BOS PC

The process can be reversed if needed, each time it is changed; it requires a reboot to apply.

## Customer Facing Second Monitor

This is a secondary display positioned to face the customer, which allows the use of a larger customer display, (Lucas GUI Customer Display) typically on one side of the monitor, together with space to display advertising to customers – banner panel. The customer display shows more detail of a typical sale, so more lines and promotions discounts, as well as the current total etc.

The device selected for the UK is a USB connected Lilliput 10.1" screen with a resolution of 1024 x 600 pixels.

The monitor requires the installation of a driver \ utility - DisplayLink-5.2.22663.exe installs that driver, provided the monitor is connected. The monitor is also capable of touch, but in this scenario we do not install the touch driver.

In the Windows Control Panel Applet Display – Settings tab you can position the second monitor.

It should be positioned immediately to the right of the main display, with the top level with the top of the main display. This monitor should also be set to extend the Windows desktop.

To use the Lilliput monitor the TACT sections below are used to configure 3 elements for this screen.

**Banner Panel** (in the Menu section) allows the configuration of the display of advertising slides to the customer. There can be different banner panels so that when the POS is active the Customer Display is visible, and the advertising is displayed alongside, but when the POS is signed off, the advertising can use the whole display.

**Customer Display** option in Devices allows selection of the Lucas GUI Customer Display

**VGA-CDU** in Fuel – Screen Layout section allows configuration for a special Fuel Sale On Offer VGA CDU, so that when a fuel sale is selected the transaction is shown on the second monitor, positioned over the bottom of the Lucas GUI customer display.

This is needed because when a fuel sale is selected, but not yet confirmed, the Total To Pay has not yet been updated – the fuel sale is not yet part of the sale basket. Showing a Total To Pay without the value of the fuel sale in this circumstance is confusing to the customer, and illegal.



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# Installation of Lucas

## Installer, BOS

Run the installer – C:\Install\Lucas\ LU\_2\_8\_1\_1069\_FUEL\_2\_1\_125  
\Disk1\InstData\Windows\NoVM\install.exe

On the Customising Files screen ensure the desired lct zip file and config.xml are selected. This will be automatic if they are the only versions present

On the Confirmation screen, check the correct workstation type is being installed, company, store, workstation number etc.

Once installation has completed, the screen should confirm Lucas has been successfully installed, and offering a choice of Reboot Now or Later. Accept the reboot now option.

## Installer, POS

Once the BOS has rebooted, repeat the process for any or all POS workstations, running the same installer over the network.

You should be able to reach the BOS lucas-install folder via the address bar  
\\192.168.0.20\lucas- install for example.

After reboot Lucas should load fully on all POSs, initialising the correct peripherals.

## Software Updates

When released, any software updates should now be applied to the system in the usual manner. Place the latest Software Update in BOS

C:\Programme\Logware\Lucas\updates

Start SMS on the BOS, user 100, password 1956 Select Send Software

Check all listed updates in order, then send to BOS and optionally all POSs. Software Update must run on the BOS first, but POSs can be selected at the same time; they will update after the BOS has completed.



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## Configuring Lucas

### Prism

Most site specific configuration is actually controlled from Prism – such as Sales headings (De-partments or in Lucas terminology Groups), all Item configuration, operators, promotions, receipt text, Paid In and Out reasons, Quick Pick Menu, etc. etc. Prism sends configuration to an Lucas sys-tem by means of the Lucas XML Import interface

In addition Prism sends the site controller configuration (pump types, grade configuration, tank and fuelling Position mapping etc.) to Lucas, which in turn has a function to download that configura-tion to the site controller from a POS workstation

To start setting up Lucas for the specific site, the first step is to prepare Prism to download all con-figurations to Lucas. It is particularly important that when this first download is done that the whole Lucas system is running, networked together etc. This can be checked from SMS, Store Status app-let

Progress of this download can be checked from SMS Parameter Change Jobs applet

### Notes on specific areas of Prism configuration for Lucas

#### Receipt

This release of Lucas allows more than four header or footer lines for the receipt. However Prism will only download the receipt correctly if the receipt is first set up and saved in the Prism POS Configuration screens

#### POS User Permissions

Prism by default has permissions for Iridium, not Lucas. Import Lucas versions. (LucasTasks.txt and LucasUserTemplates.txt should be put in C:\Prism folder)

Delete any previously created User Templates

Create 1 new User template for each access level – Manager, Supervisor, Cashier

Modify the permissions required on the new User Templates – you are setting permissions for the level, all users belonging to that level have these permissions. Changing the template changes the permissions for all users of that level

Note that you can set some functions to be accessible with a higher level override – Password protected functions

Ensure all users are attached to one of these 3 new user templates

#### Quick Picks

On the Prism screen that configures the Quick Pick quick access buttons, you can add buttons for anything you wish. Any Value entry (open) departments should be added automatically, but you do not see these in the configuration screen

Prism creates a Menu button for each Sales Heading, the item buttons appear within these menu but-tons

The first 10 items shown in this screen will fill the Top 10 buttons as well, move items up or down to control which items appear

## Fuel Configuration

**Warning:** A download from Prism to Lucas which includes Tax Rates, Sales Headings and Items (specifically Fuel items) must have been done prior to this stage

Prism should be used to configure the forecourt, setting pumps, tanks grades etc. Once the configuration is done, use the Build Configuration File option

This creates pumpconf.txt, which is passed to Lucas BOS workstation & the resultant tank / pump / nozzle / grade configuration is processed into Lucas BOS database to allow processing of the Day End Forecourt Settlement transaction. The pumpoconf.txt is passed to the POS workstations

This pumpconf.txt can then be loaded into the site controller from the Forecourt Operations menu on a POS, provided the signed on operator has permission to perform the function – Main screen Menu \ Service \Forecourt Operations\Pump Configuration (Download)

There is a text window which shows the content of pumpconf.txt, and a Download button, which requires a second confirmation

There will be confirmation of the success or failure of the download

If the download was successful, there will be a prompt for a Grade Price Change. Grades must have prices before Pumps can initialise.

Once the download has been done, and prices set, the pumps should initialise, but any issues can be examined in the scif log.

There is a shortcut to start Lucas Configuration (TACT) on the BOS desktop. This actually the TACT client GUI. All the workstations are TACT servers. At start-up, it asks for a level 4 password.

TACT reads selected settings from a POS workstation, – a Source

POS workstations are listed in the Source box; use the drop arrow to the right to see any other POS. All POS workstations should be shown in the Destinations panel.

It is normal not to see entries for all workstations here until a few seconds after starting TACT, as the TACT Client is waiting to receive a broadcast from any TACT servers available.

The name you see consists of the software type – Lucas, followed by Workstation Number, then the IP address and port number in brackets.

## TACT Settings

At the top are 3 menus – File, Options, and Help

“File” has Load from Backup, Receive to Backup, Load from Profile, and Receive to Profile. “Re-ceive to” means Save, meaning the settings saved are read from the POS, not from whatever has been modified in TACT, but not sent to the POS.

“Options” has Set TACT Folder, Automatic Backups, Diagnostics, Show Local Machine Only, Disable Quick Pick Configuration (checked) and Select Destination Automatically (checked).

Automatic Backup on Send is enabled, and keeps 20 backups for each workstation. This should give more than adequate cover to reverse changes made with TACT that prove to be incorrect.

“Help” simply contains an “About” option, giving the TACT version number.

## Backups and Profiles

Backups and Profiles are version specific. They can only be fully applied back to a system with the same software level. TACT will prevent a backup or profile from being sent to a workstation with an earlier version of the software compared to the version used to create the backup or profile.

If a backup or profile is from an earlier version of the software compared to the current version, this version of TACT will receive and send, but it will not apply Menus or Packages, therefore after sending, a further receive and send cycle is needed to configure any required menu or package changes required.

Backups are workstation specific; they can only be applied to the same workstation they were created from.

To load a backup, that workstation must be the visible workstation in the Source box; the backups then offered will have been taken from that workstation previously.

Backups and Profiles are xml files, their content is the same; their functional difference is that a backup can only be sent to that specific workstation, a profile can be sent to any workstation.



Backups are created in C:\Programme\Logware\Lucas\tact\Backup\lucas. The most recent backup is in this folder; previous backups (if saved) are in subfolders, per workstation (Company Name-Store Number-Workstation Number), then datetime sub folders e.g.

C:\Programme\Logware\Lucas\tact\Backup\lucas\Torex-1-1\06-05-10\_14.26.19\Torex-1-1.xml Profiles are created in, or read from

C:\Programme\Logware\Lucas\tact\Profile\lucas

## Receiving (Loading) Configuration

When you start TACT, you will be on the Workstations tab. All other tabs will be empty, as there is no Source loaded

Once the source and destination panes are populated you are ready to start

From the drop arrow right of the source box, select one of the POS workstations, and press “re-ceive”. TACT will collect all the current settings and configuration from the selected workstation. READY will appear on the bottom bar, and it will no longer say Source (Not Loaded)

There are tabs available along the top with the loaded configuration data shown, giving access to each area of configuration, and within each tab there are further sub-tabs, separating out different sections

You will notice that the workstation you loaded will also be selected in Destinations. (Because Se-lect Destination Automatically is checked) It is, however, Possible to send the adjusted configura-tion to all workstations, as TACT knows which settings are workstation specific. This simplifies the configuration task, as many settings will be required for all workstations, and avoids the need to repeat all changes separately for all workstations

Now you are ready to make changes. For more detail of TACT configuration options, see TACT documentation. This document covers only common customisation tasks.

## Menus

This tab gives access to the entire menu and operation buttons on all the POS screens, separated out into the various sales and payment screens, menus, top 10s etc.

For many sites there should be no need to make major changes here. The most important areas that may need adjustment are the Front Sales screen top 3 x 3 panel, the sales top 10, and the item panel options. These should be used for the commonest functions needed by the operator.

Buttons with a subtle outline and their text centred are Menu buttons; the others are actual function buttons

If you need to change a function on a key, delete the old entry with the cross to the right of the en-try. Where the menu has a limited number of buttons, The Add Operation button then appears, as the menu is no longer full.

Use Add Operation button and select the new function from the pop-up list. The functions presented will be suitable for adding to the main selling screen

You may need to move entries to keep the basic layout, keeping Menu and Quick Pick keys in their standard locations – this can be done by right clicking on the entry you want to move, then right clicking on the entry you want it to appear before.

You can also rename a button, right click, and then enter required text. However this renames the button in all languages loaded in the system.

Any key that is a Menu can be drilled into, once in that menu there is always a BACK button to go back up a level. The whole Menu structure is available this way, and you can add and remove menus as well as functions, except you cannot remove the top level Front Panel Menu and Payments Panel Menu buttons, or the Quick Pick Menu button

You will see entries for lots of functions that actually don't appear on the loaded Lucas – this is because function buttons only appear if firstly the “package” that they belong to is loaded, and secondly only if the logged on operator has read permission for that function. Further, if a Menu has no visible buttons, it will not appear on the loaded POS. It is not usually necessary to remove these functions from the menus

The function names can be a bit difficult to understand, but the commonest used for the UK dealer market have sensible names. Some different functions have similar names, so for example there is Quantity and Post Quantity. The Quantity function is actually a pre quantity - Sometimes a function could be used either before an item is sold, or after. Therefore they are similar functions, used differently

Other Payments Panel is the upper section of the Payments menu, allowing access to less used payments such as manuals, coupon, and cheque

You cannot select manual tenders individually – adding “other” to this menu populates with all pre-sent active manual tenders, but ensure there are enough buttons to show them all – Layout could be 3x2, 3x3, 3x5 etc

Item Top 10 (Quick Picks) is not accessible (because Disable Quick Pick Configuration is checked) these are controlled by Prism. Do not enable Quick Pick configuration in TACT, this will cause menu name inconsistencies with Prism

## Item Panel

Item Panel allows you to enable the panel(s), and start the GUI Item Panel Editor. There are 2 panels, Side Panel, Top / Bottom Panel. See Iridium2-scifpanels.pdf for details on using the Item Panel Editor

### Top / Bottom Panel

The drop list allows you to set various combinations, combining Pumps, CCTV, Items and Operator Banner Panel. Pumps and Items together are not possible.

An “Operator” Banner Panel allows cycling display of text messages to operators such as sales or task reminders, in a similar fashion to the images on a Customer Banner Panel

Files intended for Operators are placed in BOS:

C:\Programme\Logware\Lucas\scif\banner\import\operator and are transferred to all POSs: C:\Programme\Logware\Lucas\scif\banner\operator

They are .txt files, and the text in the file is auto centred, left right and top bottom, so should be spaced accordingly. Since it is also possible to have the operator banner panel on the side panel, the number of lines, and their maximum width varies accordingly.

A file named flush (no extension) will cause all files older than itself to be removed.

### Side Panel

Options are None, Banner, Items, CCTV or Transactions

None displays a image, pumps.png. An alternative file, such as a logo, could be used, if placed in C:\Programme\Logware\Lucas\scif\media and named pumps.png.

Transactions displays a stacked list of uncleared fuel transactions, oldest at the bottom.

Banner is an alternative location for an Operator Banner Panel – you should not enable Banner on both panels

Items is the normal sales buttons, configured with the Item Panel Editor.

CCTV is to display CCTV images from a host defined in Fuel \ Pump Controller section

## Banner Panel

Here you can set up one or more banner panels – the display on a second VGA monitor of text or images.

A second monitor is likely also to be used as a customer display

Customer Banner panels are usually displayed on a second monitor, facing the customer, and are intended to show advertising, typically a series of slides showing details of current promotions etc. The slide shown gets replaced with a neat transition to the next at a defined number of seconds.

Image files must be .jpg, .jpeg, .gif

A second display should be configured in Windows Display CP applet to be positioned to the right of the main display, with it's top level with the main screen top.

### Required settings are:

Facing, i.e Customer (but possibly Operator. This determines which folder the files are read from.)

Pixel Position Top Co-ordinate

Pixel Position Left Co-ordinate

Width (in pixels)

Height (in pixels)

Pixels are numbered left to right, top to bottom starting 0, therefore the primary POS screen uses pixels 0 to 1023 across, 0 to 767 down

### Optional settings are:

When to Show – Signed On, Signed Off, Always

Background Image

Background Colour

Text Size (For this panel only, only applies if text file used)

### Other banner panel settings are:

File Check Interval – system setting, how often scif checks for new files. Default if undefined is 5 minutes.

Display Duration – system setting, how long each image (or text) is displayed before being replaced with the next. Default if undefined is 30 seconds.

Default Text Size (normally only used on an operator banner panel) These settings apply to all Banner Panels configured on a system

## Example

Example settings for two Customer Banner Panels on a 1024 x 600 Lilliput USB monitor. One is displayed when an operator is signed on, and sits alongside the Lucas GUI Customer display, which by default is 400 pixels across by 600 pixels deep positioned immediately to the right of the main POS (default Lucas GUI CDU settings) . The other covers the whole of the second VGA screen, used when the operator is signed off (and therefore no CDU is needed)

**Banner Panel One**

Facing Customer Pixel Position Top 0

Pixel Position Left 1424 Width 624

Height 600

When to Show: When Signed On

**Banner Panel Two**

Facing Customer Pixel Position Top 0

Pixel Position Left 1024 Width 1024

Height 600

When to Show: When Signed Off

Files intended for Customers are placed in BOS:

C:\Programme\Logware\Lucas\scif\banner\import\customer and are transferred to all POSs:

C:\Programme\Logware\Lucas\scif\banner\customer

A file named flush (no extension) will cause all older files to be removed, such as when the promotions period changes

## Devices

This tab gives access to the peripheral devices of a POS

Fuel Build 125 installed using CountryTemplateUUID in the installer.properties of United Kingdom sets the peripherals to the defaults for the ELO 15D1 POS

CDU Serial on COM8

Printer Epson TM-T88V at 38400 baud on COM5 Cash Drawer5 to match the above

Symbol USB scanner

The Devices tab has two sub-tabs: Main Devices and Other Devices. Normally only the Main needs modification

Within each tab there is a selection of devices, and the selected device has 2 settings tabs, Main and Advanced.

### Main Devices

For each device type, select a device and you will have the settings tabs for that device

The settings you see on the Main and Advanced tab have been pre-set to match the hardware, so selecting the device should normally be sufficient

## Drawer

The cash drawer is connected via the printer, Select the correct Cashdrawer for the Printer. It is important that the port settings (COM Port, baud rate, flow type etc.) match the printer settings

Printer		Cash Drawer	
Epson TM-T88II		Cash Drawer2	
Epson TM-T88III		Cash Drawer	For Epson IM700
Epson TM-T88IV		Cash Drawer4	
Epson TM-T88V		Cash Drawer5	default

## Customer Display

Serial is the setting for ELO 15D1

Port COM8

Serial setup = 9600,n,8,1

CDUSerial Esc POS must be enabled

If the site has a customer facing second monitor, select Lucas GUI Customer Display

Once Lucas GUI Customer Display is selected, On the Main Device Settings tab there are entry boxes specify the size of the Lucas GUI Customer Display in pixels. Defaults are for the Lilliput USB Monitor, Height 576 pixels, Width 400 pixels

## Printer

ELO 15D1 will use an external Epson printer, TM-T88V. The ELO has a 24v Epson power supply socket. The printer should be set for 38400 baud, and the default COM port is 5

On the ELO, COM1 is on the motherboard next to the VGA connector. The RS232 sockets in a row at the bottom in front of COM1 are 6, 7, 4, and 5 running from back to front.

## Printer options and details

This table defines the various options and dip switch settings. For dip switches o = OFF, x = ON. Each bank has 8 switches, numbered left to right

Beware - the embossed diagram on the bottom of the TM-T88IV and V is effectively upside down. Dip Switch Bank 1 is closest to the front of the printer, looking at the bottom of the printer with the front at the top. In this orientation OFF is down, ON is up

	Baud (default)	Port (default)	Dip Switch	Dip Switch
			Bank 1	Bank 2
Epson	38400	COM5	000000xx	00000000
TMT88V				
Epson	19200	COM5	00000000	00000000
TMT88IV				
Epson				
TMT88III	19200	COM3	00000000	x0000000
(IM700)				

Dip switch bank 1 position 3 controls handshaking. For all these devices this dip is off, so hand-shaking is DTR/DSR.

Some sites may have been using the printer using the Serial Printer option (no longer recommended), with this dip on, meaning XON/XOFF

Dip switch bank 1 positions 7 & 8 define baud rate:

Both ON		=	38400 recommended for TMT88V
Both OFF		=	19200 recommended for TMT88III and IV
Position 7	ON, position 8 OFF	=	9600
Position 7	OFF position 8 ON	=	4800

## Scanner

USB connected Symbol LS9208 programmed as a JPOS device Select Symbol Scanner

There are no settings to change Alternatives:

USB connected Motorola DS9208 programmed as a JPOS device Select Motorola Scanner  
USB

(This scanner will also initialise on the Symbol setting)

USB connected DLS Magellan 1100i programmed as a JPOS device Select DLS-1100i-USB-Scanner

USB connected PSC Magellan 1000i programmed as a JPOS device Select PSC-1000i

(The PSC Magellan 1000i scanner is obsolete, but is supported. However it will need a manual change of Win32Hid.dll. The installed version of this dll is used by the DLS Magellan 1100i option)

**Virtual Keyboard Wedge Scanner****Select Virtual Keyboard Wedge Scanner**

This is any USB connected. Keyboard Wedge scanner. The scanner can be tested with notepad. A barcode scanned should be displayed in notepad, followed by a CR/LF.

The scanner will also need to be programmed to recognise ITF barcodes of any length, and to always return leading zeros on price embedded EAN format 02 barcodes, and UPC-A barcodes should include a starting 0 making them 13 digits

**Audit / CCTV**

You can enable Audit (for CCTV systems etc) by checking the option.

Once enabled, there are some further options:.

**Mode**

UDP can be sent to a remote address/ port number, the stream can then be received by the camera system (e.g. Eagle Eye). The IP address and port will be specified by the CCTV Company. The stream is broadcast, and does not need acknowledgement, but the receiving system needs to be fast enough to read the information.

TCP/IP is created by a lucas service transforming the UDP broadcast as above into either text or xml output (selectable on the Advanced Device Settings) to a TCP/IP host and port number, again as specified by the CCTV Company. TCP/IP requires the CCTV host to acknowledge the messages, allowing a slower system to cope.

**Host**

Used to specify the TCP/IP or UDP address for the audit to be sent to.

**Port**

Used to specify the TCP/IP or UDP port for the audit to be sent to.

**Audit Scif**

Check to include pump control events

**Audit Forecourt**

Check for one POS only to send Forecourt events (e.g. nozzle out, nozzle in)

**Other Devices****Beeper**

Leave as Logware Tone Indicator

**Card Reader**

Virtual Keyboard Wedge MSR works with any MSR configured as a keyboard wedge.

**Cash Changer Interface**

Leave as None unless Cash Guard Cash Changer device is required, in which case select Cash Guard Specific

**Cash Changer Device**

Setting is irrelevant, unless an Interface is specified. For Cash Guard device select Cash Guard

**Keyboard**

Leave as MFIIPOSKeyboard

**Magnetic Ink Reader**

Leave as Dummy

**Operator Display**

Leave as Lucas GUI Fuel Operator Display

**Pump Controller**

Leave as Pump Control

**Safe Pay**

Leave as Dummy

**Scale Interface**

Leave as None unless using Herbert or Avery Scale, in which case use Basic JPOS Scale

**Scale Device**

Select scale type (Herbert or Avery)

**CDU Via Pump Control**

Should be checked except for site using a VGA customer display

**Cash Changer Auto Mode**

Enable for Cash Guard

**EFT**

There are two main tabs, EFT Systems and Other EFT Settings

On EFT Systems there is a Main Device box, then a button to add Local Accounts

Switching on Local Accounts add Local Accounts as Subsystem1, and Card Reader as Subsystem2 The More (and Less) Buttons show (and hide) more detail on the secondary EFT Systems

Click on each EFT Systems entry to see the details for that system

**EFT Systems - Main Device**

Each device has its own Main EFT System Settings and Other EFT System Settings tabs  
Possible Options for UK use are:

Shell GIPT (Global Indoor Payment Terminal) Shell Dealer Black Box ("Payware")

BP ICP using BIA terminal

ATS – ACK ATS server, with the ATS server accessing the PIN pads over TCP/IP to serial soft-ware on each POS

Dione BP Xchequer serial terminal in normal or black box mode F75 enhanced for Texaco  
H-Tec Gemini serial terminal

F75 standard for standard H-Tec Gemini serial terminal Esso VeriFone LET serial terminal



EFT Configuration has been highly automated, selecting the right EFT system sets all required options and configuration except where noted.

## Shell GIPT

Shell GIPT (Global Indoor Payment Terminal)

Each POS has a separate GIPT terminal, which connects via the network.. You need to determine the IP address as follows:

### Print the GIPT Ethernet configuration

On the GIPT

Press \* (under 7 button) Press Comm Server (F3)

Press Right Hand Purple button (below keypad icon)

You should be in the Ethernet config screen

Press View (F2)

This shows all settings

Press Right Hand Purple button (below print icon)

You get a printout on the terminal showing the IP Address, Subnet mask, Gateway and DNS server addresses

Select GIPT as the Main Device

On the Main EFT System Settings, Enter the IP Address of the GIPT (will vary on each site)

This should set everything correctly for Shell GIPT

## Shell Dealer Black Box

Dealer Black Box is a separate PC supplied to provide all the EFT functionality, and is not configured by us. All we need to know is the IP address of the Dealer Black Box. The Black Box communicates with the PIN Pads at each POS

Select Payware as Main Device in EFT Systems

For Payware, Main EFT System Settings

Set the IP Address of the Dealer Black Box

In Other EFT System Settings

Set the workstation ID as 0x where x is this POS number

Set Application Sender to PAYATKIOSK7816

Enable Day Reconciliation

Leave all other settings at defaults

## BP ICP

Each POS has a ICP terminal, which has a fixed IP address for each POS. To allow the POS to access the device IP, which will not be within the normal Lucas IP Address range, a route is added to the TCP/IP configuration of the machine, Instructions for route add command to follow.

Select ICP

## ATS

ACK ATS is a server based EFT system, where the server runs on one workstation (usually POS1), and that server communicates to the PIN Pads attached to each POS via a TCP to Serial converter running on all POS workstations. IPToSerial.exe is an ACK application, included in the images.

ATS does not run shifts, but there is a day end process needed where the EFTs are batch polled overnight. Some ATS systems use Datacash as the host, which uses the Instant Submission Service and therefore there is no day end process.

For batch polling, the necessary file needs to be placed in POS1 (assuming POS1 is the ATS server machine) C:\Programme\Logware\Lucas\eftlink\dayend.bat

Select ATS as Main Device in EFT Systems

### Main EFT System Settings

ATS External Reconciliation – enable for ATS where not using Datacash service. . This runs day-end.bat in C:\Programme\Logware\Lucas\eftlink at EFT Day End.

Set IP address of ATS server. It will default to POS1 IP Address, set the IP Address of the ACK ATS server machine if not POS1

### Other EFT System Settings

Iptoserial Tcp Address = this will default to this POS's IP Address Iptoserial Com Port = COM1 default

ATS Workstation ID = Should default to 1 on all workstations, leave as 1 because

ATS Workstation ID POS Based is enabled, (default) which causes EFTLink to automatically in-crement according to POS number.

If ATS Workstation ID POS Based is disabled, ATS Workstation ID must be set to the actual POS number

ATS Day Reconciliation disable if using ACK ATS to Datacash Leave all other settings at defaults

## BP Xchequer

The BP Dione Xchequer is a serial device, which runs in 2 different modes:

Standard - All operator dialogues, operator inputs and EFT voucher printing is done at the Xchequer terminal

Black Box – Operator dialogues, input and printing of vouchers is at the POS

Black Box mode requires an update of the BP Dione Xchequer from Dione, which is chargeable Lucas auto senses which mode the Xchequer is set, so will operate with either

BP Dione Xchequer is also a loyalty terminal for BP loyalty cards (Nectar)

BP Dione Xchequer requires shift & day reconciliation, Lucas will automatically open & close shifts on the device at shift open and close. Each device will receive a day-end request if EFT Day End is included in Lucas Period Close actions. By default each POS workstation is included in the Day End Clients set in Other EFT Settings

BP Dione Xchequer produces shift reports & day reports, printed at the terminal in standard mode, or printed on the POS printer in Black Box mode. Day reports are spooled, and printed at the next shift close on that POS

Select BP Xchequer as Main Device in EFT Systems

**Main EFT System Settings**

Port Name = COM1 (the default, the serial connection to the BP Dione Xchequer) Baud Rate = 4800 (default for BP Dione Xchequer)

**Other EFT System Settings**

Master Timeout = 60 (seconds before Lucas will assume BP Dione Xchequer has failed)

Since the protocol demands that the BP Dione Xchequer is the master in comms, we have to have an overall timeout, which should be long enough for any realistic transaction, but once expired will allow the POS to carry on if the Xchequer stops responding. Setting too short a timeout risks completing a payment on the Xchequer, but Lucas assuming there was a problem, abandoning the payment and thus not clearing the sale. Setting 0 here disables the timeout completely. In general a longer timeout is desirable in standard mode

Site ID = Dione supplied site ID (this is required for Xchequer to be able to collect Nectar Points information for local customers)

Site Name = Site Name (this is for the EFT slip on standard mode Xchequers, TACT auto-populates address from the system's receipt configuration)

Generate Loyalty Receipt - If checked the POS will print a loyalty points ticket after loyalty points when in Black Box mode

Blackbox Mode – if checked stops site name and address being duplicated on EFT vouchers at the POS, as they already have the receipt header and footer.

**F75 Enhanced Mode (Texaco)**

This is the H-Tec Gemini EFT Terminal using the enhanced version of the protocol that was developed for Texaco. All dialogues, operator input and printing is done at the terminal

Enhanced Mode F75 allows the POS to initiate a day end. Each device will receive a day-end re-quest if EFT Day End is included in Lucas Period Close actions. Each POS workstation is included automatically in the Day End Clients set in Other EFT Settings

**Main Settings**

Port Name = COM1 (default, serial port for connection to Gemini)

Baud Rate = 4800 (default)

**Other Settings**

Master Timeout = 120 (As with Xchequer, long enough for any reasonable transaction, but allowing Lucas to carry on if the Gemini stops responding. 0 = no timeout)

**F75 Standard Mode**

This is the H-Tec Gemini EFT Terminal using the original version of the protocol. All dialogues, operator input and printing is done at the terminal

Standard F75 has no POS initiated day-end, operators must close day at Gemini

**Main Settings**

Port Name = COM1 (default, serial port for connection to Gemini)

Baud Rate = 4800 (default)

### Other Settings

Master Timeout = 120 (As with Xchequer, long enough for any reasonable transaction, but allowing Lucas to carry on if the Gemini stops responding. 0 = no timeout)

## Esso VeriFone

All dialogues, operator inputs and printing on the terminal

The Esso VeriFone Requires shift & day reconciliation, Lucas will automatically open & close shifts on the device at shift open and close. Each device will receive a day-end request if EFT Day End is included in Lucas Period Close actions, & the POS workstation is included in the Day End Clients set in Other EFT Settings

### Main Settings

Port Name = COM1 (default, serial port for connection to Esso VeriFone terminal) Baud Rate = 4800 (default)

### Other Settings

Master Timeout = 120 (As with Xchequer, long enough for any reasonable transaction, but allowing Lucas to carry on if the Esso VeriFone terminal stops responding. 0 = no timeout)

## Local Accounts Subsystem 1

Press the More button to show all the subsystems selected, then on Subsystem 1 to see the Local Accounts settings

On the Main tab, check Server is Local – Lucas EFT software will communicate to a service configured to run on all POS workstations, which in turn communicates to Prism's Local Account system

Local Accounts Server IP will update to the IP of this workstation

On the Other EFT system settings all settings should be left at defaults

## Card Reader Subsystem 2

There is no longer any need to have a separate Card Reader sub-system. Cards swiped on the POS when using the Virtual Keyboard Wedge Option are handled according to the card itself and the current state of the POS (Ready, in a Sale etc.)

## Extra Settings

Pressing More again shows which EFT Subsystem is responsible for Loyalty and for Card Read

These are set automatically for each EFT system.

## Other EFT Settings

The secondary tab at the top of the EFT section accesses some system wide parameters

### Smart Cancel Key

This option should be checked on systems using ATS only, the filter timeout normally should be 100ms

### **Fuel Volume Adjustment**

This function allows split payments when using fuel cards. If a fuel sale is partially paid with some other tender, such as cash, & the customer wishes to pay the remainder on a fuel card such as All-star, the fuel sale volume will be adjusted in proportion to the value being paid. This prevents settlement problems where the value of the sale does not match the quantity of fuel in the polled EFT transaction

### **Backoffice Settings**

This sets up the EFT day end clients

Manual Dayend IP Config If enabled EFT Day End clients can be set manually, left disabled the number and IP addresses of the POSs requiring day end will be set automatically as per the EFT system selected

For ATS, not using Instant Submission there should be 1 client, and the IP address of the work-station that also has the ATS server, default POS1, 192.168.0.101 entered in Dayend Client0IP box

For Shell Dealer Black Box there should be 1 client, and the IP address of POS1, 192.168.0.101 entered in Dayend Client0IP box

For Shell GIPT, BP ICP, BP Xchequer, F75 Enhanced and Esso Verifone LET the number of clients should be the number of POS workstations, with each POS IP address listed in the Dayend Client boxes

### **Card Reader Settings**

These should be left disabled.

### **Credit Card Blacklist**

It is possible to prevent payment for certain items with credit cards.

This would usually be to prevent payment for a Paypoint Bill Payment with a normal credit card, as the commission earned on the bill payment is less than typical credit card processing costs to a retailer

The card types set to not allow this are Visa, Mastercard, American Express and Diners Club. (All debit cards are allowed; processing costs are much less)

This is controlled in C:\Programme\Logware\Lucas\eftlink\FuelCardRange.xml, for each

CardTypeAttributes element, the Class="Credit" attribute identifies the Card Type as a credit card. It is important that the relevant Paypoint items are set up with the correct EFT restriction code by the back office – 8 (Services) is recommended.

## Fuel

This section covers configuration of and connection to the Site Controller.

### Site Controller

Sitecon Address = TCPIP address of Site Controller (192.168.0.19 default)

Sitecon Type = DOMS, Micrelec 9730 or Simulated

Protocol Version – leave as Standard Site Controllers

POS Number = 1 - will default to this workstation number if:

Use Workstation ID for POS Number = checked

POS Number of Backoffice – set at 5 unless the following is set: Use Proxy Connection On Backoffice

The back office needs to connect to the site controller at day end, to collect Tank Levels, Pump Totes etc. The Proxy option means that the back office connects via any available POS, & does not need to know what type, address or workstation number to use

If the Proxy option is not selected, the back office will connect directly to the site controller using the Address & Type information set here. However it must use a workstation number that is not already used by a POS to do so. There is a limited number of workstation Ids available on site controllers

Software Tank Levels – this option allows POS1 to keep a virtual tank level based on deliveries entered, sales and tank dips entered, if the site has no tank gauge. It is used on some TCG Fuel Wrapper sites

### Pump Controller

Pumps = the number of fuelling Positions on site

Barred Pumps = pumps that this workstation is not allowed to authorise (e.g. 1,2,7-10 would mean this workstation cannot start pumps 1, 2, 7, 8, 9, 10. Used for restricted view POS workstations)

This POS can still process fuel sales from these pumps

Pump Button Layout = If blank the pumps are auto- arranged and sized in number order  
Otherwise this is a comma separated list on 1 or more lines, detailing the arrangement of the fixed size pump buttons. Gap means a small gap, 0 means a pump button sized gap – example:

Gap, 1, 2, 0, 7, 8

Gap, 3, 4, 0, 5, 6

Transactions per Pump = 2 (UK limit)

Drive Off Time = 600 (number of seconds before a fuel sale is flagged as a potential drive-off)

Outdoor Transaction Button = unchecked (This is an option for Belgium: where there is an OPT, the Transactions per Pump is extended and a separate OPT sale button appears above Kiosk transactions on the selected pump display showing any OPT sale)

CDU Currency Code – leave at 163 for UK, 163 is the £ symbol in the CDU code page

### CCTV

These settings apply if either Side Item Panel or Top Item Panel is defined as with CCTV, it allows a live feed of CCTV from the defined web host

## Screen Layout

The layout options should be left on defaults (they allow pumps to be configured to the bottom of the POS, and the side panel to the left of the POS)

Pump Button Fixed Current Stored Layout controls the transaction lozenges on pump buttons Show at POS Transaction Disk enables the Paying at POS indicator on a pump button

### VGA CDU

These settings allow configuration of the “On Offer” pump transaction display to overwrite the bottom of the Lucas GUI Customer display. This will only be used on a Fuel site.

Defaults are for Co-Op wrapper use.

For a Lilliput USB monitor select Lucas GUI with Lilliput, settings will then be fixed to suit the monitor and the Lucas GUI Customer Display

To have access to all settings manually, select User Defined, for example on a second monitor with a different resolution.

## Prepay

Lucas supports prepay operation, as long as the pumps have 2 stage valves. (Without 2 stage valves, pumps will not stop exactly on authorised amounts)

Enabled = checked to allow pre-pay – All prepay packages will be enabled automatically.

Integrated Prepay = checked for standard operation

Autoclear Prepay = checked means fuel transactions that are pre-paid are cleared automatically with the prepay already completed

Autoclear Prepay Underpayments = unchecked (checked would clear the prepay sale even if the pump over-delivered)

Autoclear Prepay Overpayments = If checked allows the prepay sale to be cleared from the pump automatically; a refund of the balance can be processed at any time. If unchecked, the operator must process transaction, although they can still defer the refund of the balance

Prepayment Presets = a comma separated list that populates the four fixed value buttons presented when creating a prepay (or doing a preset authorisation of a pump). Prepay is not restricted to these values, any value can be entered by the operator

## Preauth

Pre Authorisation is setting a pump to start automatically when the nozzle is lifted. This function is not typically used in the UK.

The cancel auth at sign off option prevents sites using pre-auth leaving pumps pre-authorised when the POS is inactive

## Preset

Preset is authorising a pump up to a specified value. This can only be done before a nozzle is lifted. It is a useful way of controlling the amount a customer is allowed to dispense in a kiosk transaction

Preset Enabled = checked - allows function

Forced Preset = unchecked. (This option, which forces the operator to select a maximum amount when authorising a pump, might be used during fuel shortages for example)

## Language

Here you can specify a customer and operator language for the pump control part of Lucas – (operator display, fuel transaction under offer to the customer on the CDU etc.), for UK leave both as EN

## Grades

The grade names have to be entered here, so the grade names appear on the pump control buttons & menus in Lucas. This does not affect the sale of fuel, as once transferred across to the main Lucas sales screen, that grade should carry the correct name on the display for the operator, the customer and on the receipt. This is because the name comes from the fuel item downloaded from Prism. However the names are needed while the transaction is still on a pump (fuelling position) and crucially on tank gauge reports, the grade price change screens etc.

For Prism – Lucas we have straight through mapping – The sub-sales heading number in Prism = Lucas item number = Site Controller grade number. Check Prism or Lucas SMS application Item Maintenance applet to identify numbers in use, and then put descriptions in the boxes in this section

## Carwash

This section configures access to a Codax Ticket Terminal

The serial link to the Codax is to one POS workstation only, using an available RS232 serial port on that machine.

All other POS workstations communicate with the Codax Terminal via the connected POS

### Access

-This defines the communication protocol to be used, which depends on the EPROM fitted to the Codax Terminal, options are NONE (switches off the interface), VBI, ARCIRIS, PSD

See PSD documentation for the specifics of these different protocols

### Target Host

– The IP address of the connected POS workstation

### Target Socket

– leave at default 20050

### Codax Port

The default is COM6. On the ELO, COM1 is on the motherboard next to the VGA connector. The RS232 sockets in a row at the bottom in front of COM1 are 6, 7, 4, and 5 running from back to front

### Codax Direct Print

– if checked, the Codax PIN is printed immediately on a separate ticket

If unchecked the Codax PIN is printed on the POS receipt – which will be printed automatically

Printing on the receipt prevents a Codax PIN being printed, after which the sale is voided or cancelled



## Forecourt

This section is used to set up pumpconf.txt for non-Prism sites. It can be used to check a pump-conf.txt provided from Prism, however on no account use this section to make changes, and most importantly, do not use the Activate on Send option on the Activate tab when Prism is present.

## Receipt

This gives access to receipt printing options

## Functions

### Receipt Print Options

Select from:

- Automatic Receipt Print
- Automatic Receipt Print when drawer opens Manual Receipt Print
- Manual Receipt Print with drawer open

The two drawer open options assume change will be given in the local currency, and the sale is complete

Print Extended EFT info – this option includes EFT payment information on the receipt  
Operator Name on Receipt – site preference

No Headers and Footers on Non-Sale receipts – site preference, saves paper

Use Receipt Optimisation – When set, multiple items are combined in one line on the receipt, e.g. if they scan a Mars twice in the sale, the receipt will show the item once with a quantity 2

Print Code for Item – options are Barcode (default, last 6 digits of the barcode). Item or none

Print Layaway Sales Slip – Layaway is a special type of Suspend which captures a table number, it would be used in Restaurants. This option allows suppression of the normal Suspend receipt

Suppress VAT for Item – if checked the VAT code is not printed after the price against each sale line

Print VAT Summary - This prints a Summary breakdown of the sale with Rate, Ex Vat amount, VAT and total for all different rates in the sale with totals

Print VAT Summary Title - Prints “VAT Summary” above the breakdown.

Suppress Mix and Match Detail – stops line level detail being printed when a promotion is trig-gered

Suppress Receipt Barcode – stops the printing of the receipt barcode, which is used in Validated Refund, and can be used in the reprint receipt function.

Age Restriction Message in Header – moves any applied age restrictions from individual sale line to a shorter statement in the receipt header

Print Mix and Match Subtotal – shows a subtotal on the receipt of the sale total before promotions applied

Continue if Printer Offline – do not use, works with Serial Printer only, allows the POS to continue

## Enable Receipts For:

Provided the site is not running one of the Automatic Receipt Print options, some types of transactions can be set to automatically print a receipt.

In the list, the only types that definitely should be checked are Prepay Payments and Suspended Sales. The rest are optional – in all cases a receipt can be printed on demand anytime

## Receipt Header and Receipt Footer

Lucas Receipt Header and Footer are controlled from Prism, so do not make changes here; they will get overwritten by Prism downloads

## Reports

This tab gives access to configuration of the POS reports available from Lucas. There are 2 types Shift Report printed automatically when a POS is settled (the shift is closed) at the POS

Day Report printed automatically if Manual Day End is run from a POS workstation, available at any time for the current day with manager permissions

For each type of report select those sections of the report required

Detailed advice on the report options is available in [Iridium2-reports-advice.pdf](#)

## Packages

In Lucas a package is a function or set of functions that has one or more operations included. Some packages are mutually exclusive, and some are fundamental to the operation of the POS

Packages are loaded at POS start-up – in fact you can see this list being initialised as the POS starts.

In general with this release, you should only change options on the Main Packages tab; some packages are dependent on others, and must be started after the package they are dependent on. TACT automatically sorts the loading order for this.

TACT presents all packages available; in general do not modify packages on the Other Packages tab

## Main Packages

Audit Package is a UDP audit broadcast for some camera systems. This will be automatically enabled if Audit is enabled in Devices / Main Devices. Configuration for Audit is available there as well.

Cancel Void Suspend Package switches on the question to operator when they void a resumed suspended sale. The question asks if they want to cancel the resume (leaving the sale suspended) or void all the sales lines. If they answer void all sales lines, and the sale contains fuel, which cannot be voided, they get a warning that this is not possible

E-Top Up Package enables E-Top Up – see separate documentation

EFT Voucher Package – This package will be part of Shell GIPT implementation

Employee Receipt Discount Immediate Package – this enables the application of employee discount at any point in the sale, usually via a discount barcode

Fuel Sales Package is the main switch for the Fuel Sales wrapper, needed on all sites

Gift Certificate Package – not used in the Convenience and Fuel implementation

Item Creation Package allows the creation of a new item when an un-recognised barcode is scanned

Layaway Suspend Resume Package – enables a version of the Suspend function that captures a table number – used in Restaurant functionality. The table number can be used to recall the sus-pended sale.

Post Change Value Package – used by Budgens to modify the price of a weighted item

Settlement Pickup Period Close Package – The Settlement Pickup Period Close package applies with the Day End Window. If a shift is closed within the window times, and it is the only remaining open POS shift, the operator will be asked if they wish to close the day as well during the shift end process. The package can be disabled by enabling Settlement Pickup Package on Other tab

## Other Packages

Except where listed here, do not modify

Card Validation Package is pre-validation (usually of fuel cards); currently only available if primary EFT Subsystem is ATS, otherwise leave disabled.

Cash Foreign Package allows Foreign Currencies. Default disabled, the build has Euro included, but to use, the site need to maintain the exchange rate.

Cheque Payment Package enables Cheque method of payment Item Detail Sales Package allows Item Lookup with a details button

Paid Out As Item Sale Package – Use with the setup instructions for Prism and Lucas

Settlement Pickup Package should be enabled if Main package Settlement Pickup Period Close is not required. This will automatically disable Settlement Pickup Period Close

Training Session Package – optional, allows putting POS into training mode, where transactions are not included in shifts, reports etc. Pump control is automatically switched to the pump simulator. However EFT transactions will still be processed by the EFT subsystems

## Logs

This tab allows setting of logging level for each of the logs generated by Lucas There are 5 possible levels in ascending order of detail:

Fatal / Error / Warn / Info / Debug

For most purposes logs are set at info level, which gives a reasonable level of detail to investigate any problem encountered, but keeping the log file sizes manageable. Debug would normally only be used when investigating a specific issue

XPOS is the main POS process; at info level most user activity, input from peripherals etc. can be seen, except printer output.

EFT shows the communication between the POS and the selected EFT systems.

SCIF logs the pump control interface, covering operator actions, and communication to the selected site controller, showing pump activity and transactions.

The individual services that are part of the Lucas Background Services also each have their own log. This tool only changes logging level for POS application and processes.

## Other

This tab gives access to a number of settings that don't fit in the preceding categories

### Safe Drops

Canister entry enabled – default enabled. If enabled allows the entry of a canister number. Canister entry optional – default disabled. If enabled site is not forced to enter a canister number

### Dynamic Mode Translation

Dynamic Translation Enabled – default disabled. This is a development tool for building translations in different languages.

### No Means of Payment

Capture Customer Address – default enabled. If this option is enabled, cashier will have to enter customer details on screen when processing a No Means of Payment (Suspend) – the information entered is printed on the automatically printed receipt. If disabled, the receipt has spaces to enter the details by hand.

### Item Creation

Prism Mode – default enabled. In Prism mode Item Creation uses the barcode, less the check digit, as the newly created item ID. In non-prism mode the number is system generated, auto incrementing.

Allow Item Search – default disabled. If enabled, the cashier can attach the new barcode to an existing item. For Prism this must be disabled

Department – default blank. Enter the temporary department number here. For Prism this should be a sub-heading, e.g. 20001. This heading must exist, and should have been sent from Prism.

Taxcode – default blank. If left blank, Lucas will allocate the commonest tax code to the temporary new item. Alternatively a code can be entered here.

### Fiscal Seal

Fiscal Seal Enabled – default disabled, unless Belgium is used as the Country UUID at installation (config.xml) This is used in Belgium only.

### Period End

Workstation for End of Day – default empty. This means any POS can run Manual Day End. If a Workstation is entered here, only that workstation can run Manual Day End.

Check Till is Settled First – default enabled. This is used for Manual Day End. When enabled, a check that all POS workstations have closed shifts is run.

Auto Settle Workstations – default 27. The property a csv list of workstation types Day End will force close shifts for, 27 is a virtual OPT (outside Payment Terminal). In other countries this function can also be used to force close POS shifts as well.

Settlement includes pickup – where shifts are forced closed, the cash is either deemed to remain in the POS drawer (false) or deposited in the safe (true)

Completion Check Retries – leave at 20

Day End Type – Forecourt for fuel sites, Convenience for others

The Forecourt Day End connects to the Site Controller, to collect Tank Levels, Pump Totes etc.

Suspended Sales at Shift Settlement – options are Don't Warn, Issue a Warning (default) or Prevent Settlement. This applies to shift close at the POS

Start of Day End Window default 20 = 8.00 pm End of Day End Window default 24 = midnight

The Day End Window applies with the Settlement Pickup Period Close package. If a shift is closed within the window times, and it is the only remaining open POS shift, the operator will be asked if they wish to close the day as well during the shift end process.

## **Drawer Open Mode**

Drawer May Remain Open – leave this option disabled.

If checked the POS can start a new sale, with the cash drawer still open after the previous sale – warning – this is not very secure, option was requested by a specific customer

Delay before Sale is Auto Closed – number of seconds before which changing screen automatically clears, back to ready (normal front) screen (only applies if function above is enabled)

## **Aggressive Safe Drop**

Aggressive Safe Drop Check Threshold % - a percentage of the standard Safe Drop Warning Amount, set in section Safe Drop Warning Amount

When the Cash in Drawer reaches this percentage of the Safe Drop Warning Amount, as well as the warning icon flashing, & the bottom bar of the POS turning yellow, the operator gets a warning message asking them to do a safe drop after a sale, which needs acknowledgement before they can do anything else. This is repeated every 3 transactions until a safe drop reduces the cash amount below the threshold. The default is 120%, so if the Warning Amount is £200, the Aggressive Warning starts to appear when the Cash in Drawer reaches £240

Set at 0 to disable Aggressive Safe Drop prompts

## **Loyalty**

These settings are automated with the EFT system selection, do not modify.

## **Belgian Back Office Service**

A service to interface to a Belgian back office system – not used in the UK

## **Sales Slip Buttons**

This option switches on or off the Up, Down, Repeat and Void keys at the bottom of the POS sales list. Disabling the keys is used on some convenience stores.

## **Item lookup Order**

This option controls the order in which a number entered at the POS is tested against items in the database. Default order is 2,1,3 – Manufacturer's barcode, POS barcode, then item number.

This is used in handling short barcodes, e.g. on Budgens

## **NAXML Data Interchange**

This enables the interface to NAXML format back office – FMS Genesis uses this interface in the UK

## **Employee Discount Barcodes**

This option configures barcode recognition of Employee Discount barcodes

## **Fuel Reminder**

When enabled, if the first item in a sale is not Fuel, the operator is asked to check the customer has not had fuel

## **Eat In or Takeaway**

This option is for a Take Away function, where items can have their VAT rate changed if sold Take Away. The items have to be set up with a special import, which defines their take away tax rate.

## **Returned Item Price Input**

Normally when Item Return is used, the operator is asked to confirm, or allowed to modify the price. This is because the price may have changed since the original sale.

This option suppresses the function to confirm or change the price.

## **Look and Feel**

Display Scheme – Default is Brushed Metal

Options are Aqua, Brushed Metal, Dark Grey or Corporate (Black) – these are different colour schemes for the POS screens.

## **Send To Workstations**

Back on the Workstations tab, the changes made can now be sent to a workstation

The original workstation used to Load will be set as the destination by default, but other workstations can also be selected

If sending configuration to any other workstation, after Sending, do a receive from that workstation, check the workstation specific settings, correct if necessary and send back.

## **Reboot**

Since many of the settings configured with TACT affect services, and set up EFT interfaces etc. Now all workstations should be rebooted. This ensures everything is set up correctly.



Lucas BOS application Store Management System.

SMS provides useful tools to monitor a system, such as the ability to run reports, view transactions, show the status of individual Lucas POS systems, see the cash drawer levels of individual tills and to close the shift on a POS in the event of a problem

For that purpose the standard Manager (operator 1, default password 1) user has a set of permissions, which shows only these tools

A higher level user is provided for installation and support, operator 100, password 1956, with fuller access, including access to Parameter Maintenance. Please do not show this access to the site management.

There are a few changes that have to be made in SMS that are specific to site Start SMS Application – Sign on as Operator 100, password 1956

Start Parameters Applet

## Default Float

In left-hand pane, expand Company1, then Stores and Store 1

For all POS workstations (all except workstation 10, the BOS), select each workstation, then in the middle pane, expand Tills – each POS workstation will have one till – select

In the right-hand pane edit Opening Amount – Default Float amount

Opening Amount (Default Float) works as follows: Any figure entered here is deemed to be held back on the close shift cash declaration, as the float for the next shift. The operator declares the whole amount in the till (including the float), but the system assumes only the balance (declared amount – default float) is transferred to the safe

This is very handy if a site always uses a fixed float, as it avoids the need to add the float at the start of each shift, and matches the way many sites operate

For the very first real shift, an Add Float (opposite of a Safe Drop) should be done, after that the float is transferred over from the last shift to the next

One point the site management should be aware of, is that if the outgoing operator happens to declare a cash amount less than the default float, then Iridium 2 only carries over the cash amount declared. This is sometimes possible, especially if the operator is carrying out safe drops over-enthusiastically immediately prior to close shift. (The solution is to simply add float for the difference between the cash declaration at that last shift end, and the default float figure, thus restoring the float to the default)

If a site wants to have a blind float, which they do not declare, then leave default float at 0



## Safe Drop Warning Amount

In left-hand pane, expand Company, then Stores and select Store

For all POS workstations (all except workstation 10, the BOS), select each workstation, then in the middle pane, expand Tills – each POS workstation will have one till – select

In the right-hand pane edit Max Allowed Amount – the Safe Drop Warning threshold Default here is £5 million

There are actually 2 levels of Safe Drop warning. This is the first level, if the figure entered is exceeded, the “Too Much Money” icon flashes red on the bottom of the POS screen, and the bottom bar turns yellow

In TACT there is another setting – Aggressive Safe Drop, which is a percentage (default 120%), above which as well as the “too Much Money” warning, the operator gets a pop up message after a transaction asking them to do a Safe Drop, and needing an acknowledgement before they can do another sale. This warning is repeated after every 3 cash transactions, until the cash level has been reduced below the threshold with a Safe Drop.

## Switching Off Unused Manual Tenders

In Parameters, left-hand panel, at Store 1 level, expand Applications in the middle panel, then select Tenders, and in the left-hand panel deselect any Manual Tenders the site does not want to use. (There are several labelled Manual 6, 7 etc, as “spares”)

Manual Tenders you want to use can be renamed in Parameters, Company Level, Tenders, Other

Making this type of changes at Store Application level is non-destructive, any can be re-enabled later. This is in contrast to deleting a tender at Company level which is not reversible

However if you wish to change the name of a tender, you can do this at Company level It is also possible to adjust some Tender settings (for example maximum allowed deviations (error at shift close) on cash declaration

## Day End

Lucas allows for 3 options:

1. A Question (“All shifts are now closed. Do you want to run Day End now?”) to the operator when closing a shift during the Day End Window, and if all other POS shifts are closed.
- 2.
3. A manual day-end run from a POS button Manual Day End.
- 4.
5. An automatic day-end configured at a fixed time each day.

As far as Lucas is concerned, Day-End is simply a convenient reporting point; it does not necessarily have to coincide with shift closure, but where used with Prism, day end has to be after shift close

Also Prism needs an Lucas day end to collect Fuel reconciliation data – Tank Dips, Nozzle Totes etc

In Lucas SMS application day-end is called Period Close

## Prompted Day End at Shift Close

This is suitable for all sites. Required package is Settlement Pickup Period Close Package. If a shift is closed in the defined day end window, and there is no other open POS shift, the operator is asked the question during the shift close. If the answer is Yes, the Day End runs as well.

## Manual Day End

This is suitable for all sites. Required package is Period Close Package.

All POS shifts need to be closed. On the last POS, the operator also closes their shift, signs back on any POS, and immediately selects Manual Day End. There is a brief wait, followed by the print of the site Day End report, followed by an automatic sign off.

As soon as that stage is reached, operator/s can sign back on any POS and resume sales

## Automatic Day End

Day End is a background process that runs at a fixed time, simply expecting all POS workstations to have had their shift closed, typical on a non 24-hour site. The advantage is that an operator does not have to remember to run the process, the main disadvantages are that there will be no site report printed at a POS (although reports are available in SMS), and the process cannot run if a shift is not closed

## Configuring Day End

Period Close needs to be configured, whichever Day End type is going to be used On the BOS, start SMS application and sign on

Select Period Close applet

You see what actions are currently configured, and the current running period, typically 0 on a new install

On the top right hand side are icons for Configuration (a stubby looking pencil) and to run period close (a green triangle)

Select Configuration, and the Configuration Editor opens

### Period Closing Steps

There are a range of steps possible. By default these steps are set:

- Are Till Drawers Settled? – a check that all shifts are closed
- Close EFT Day – a process of closing the EFT day that varies according to the EFT sub-systems
- Database Secure – an incremental backup of the BOS arts database (see disaster recovery section)

The full range of possible actions is on 3 tabs on the left. Actions can be dragged from the tabs to the Period Close Steps pane, or from the Period Close pane to the trash can bottom left

## Reports at Day End

A range of reports printed at the BOS default Windows printer are possible, but that requires a minor adjustment to the set-up of the Lucas Background Services to configure them to run under the POS windows user account, rather than the system account

Control Panel, Administrative Tools, Services Properties of Lucas Background Services – Log On tab

Check “This Account” (which de-selects Local System Account), enter POS as the account name, and enter the torexretail password twice. Apply the change, which applies on the next start of Lucas Background Services

Period Close runs out of the PCS service, part of the Lucas Background Service bundle, and without this change the service would not have access to the default Windows printer

## Automatic Day End setting

Check the option in the Configuration Editor, and use the spinners to set the time required. This needs to be re-checked after each access of the Configuration Editor

For a system using Manual Day End, ensure this option is not checked

## EFT Day End

EFT Day End as an action prompts Lucas BOS to search for Day End Clients. Day End Clients are configured with TACT, usually automatically.

Server based EFT systems (ACK ATS, Shell Dealer Black Box etc) only need one POS to close the EFT day. Terminal based EFT systems (BP Xchequer, GIPT, Esso Verifone etc.) require each POS to close the EFT day

At Day End the BOS will send a close day message to the EFT service on the specified workstations. For each EFT Subsystem that supports day reconciliation, commands are then sent to the system or device/s and the day is closed. Depending on device, either the terminal immediately prints a report, or in the case of an Xchequer in blackbox mode, a report is saved on that POS, which will be printed on the POS printer at the next shift close on that POS

F75 Standard protocol does not support EFT day end; site has to close the day on each H-Tec Gemini terminal manually.

ATS running batch transfer needs 1 DayendClient – POS1 (assuming ATS is installed on POS1), and runs a batch file C:\Programme\Logware\Lucas\eftlink\dayend.bat to run through a series of steps to batch up, convert and set up the polling executable.

ATS running Datacash with Instant Submission does not require EFT Day End. Local Accounts does not support Day End