Utilix Standard

User Manual DRAFT V1.10.14.25. JB

1. Preparing to Use Utilix Standard

Prior to utilizing Utilix Standard with an instance of Samsung VXT, a few things are required:

1. The user must purchase licensing for Samsung VXT CMS. The VXT CMS is required to use Utilix Standard.
2. The user will need to register for a VXT CMS account at https://www.samsungvx.com, and then activate the purchased licenses on the account.
3. The user will need to purchase a license for Utilix Standard, to use the PIRS app in VXT. This can be done via any Samsung reseller, or directly through the Samsung website marketplace.
4. The user will need to activate the Utilix Standard license within their VXT license management menu prior to use.

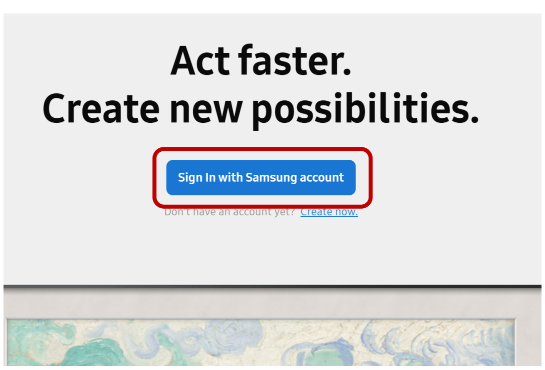
For additional information on using the VXT CMS, please refer to the web manual at: https://docs.samsungvx.com/eng/start_here.html

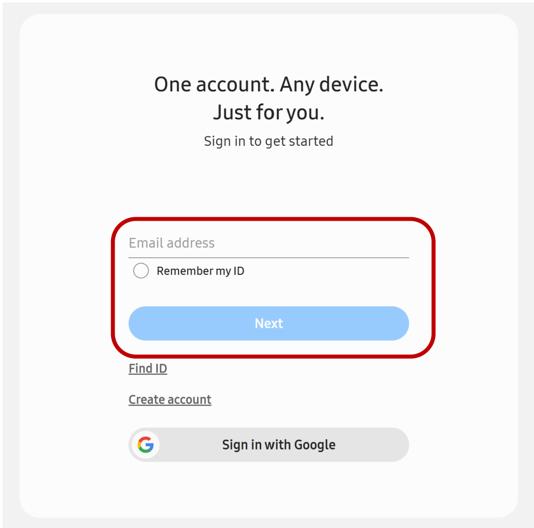
2. Installing the Utilix and Utilix Exporter PIRS App in VXT CMS

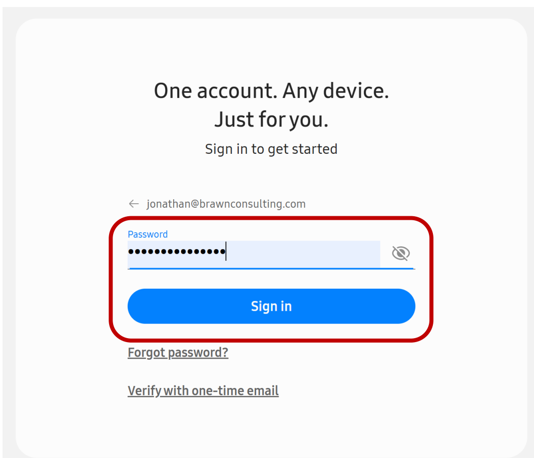
Utilix Standard uses a VXT PIRS (Permanently Integrated Repeatable Solutions) App to integrate into the CMS. This provides functionality to transfer content to Utilix, and to integrate dynamic templates back into VXT Canvas content.

The user will need sufficient permission to access VXT Canvas, and to create content.

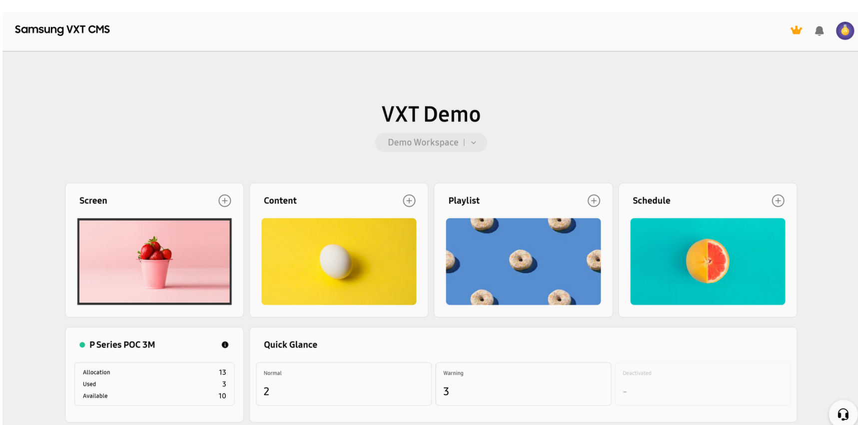
1. First, log in to the VXT CMS, https://www.samsungvx.com with your username and password.



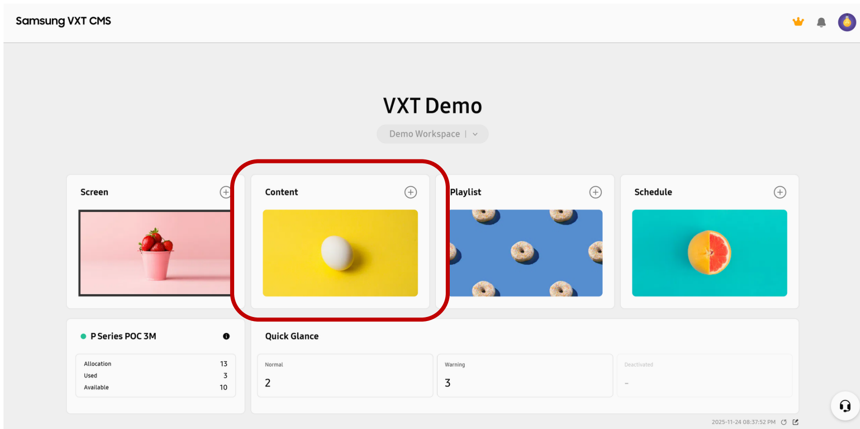




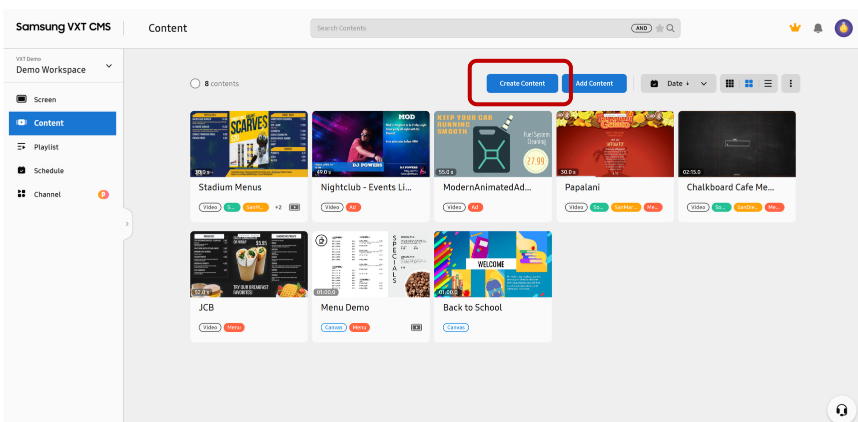
2. After logging in, VXT will display the main dashboard.

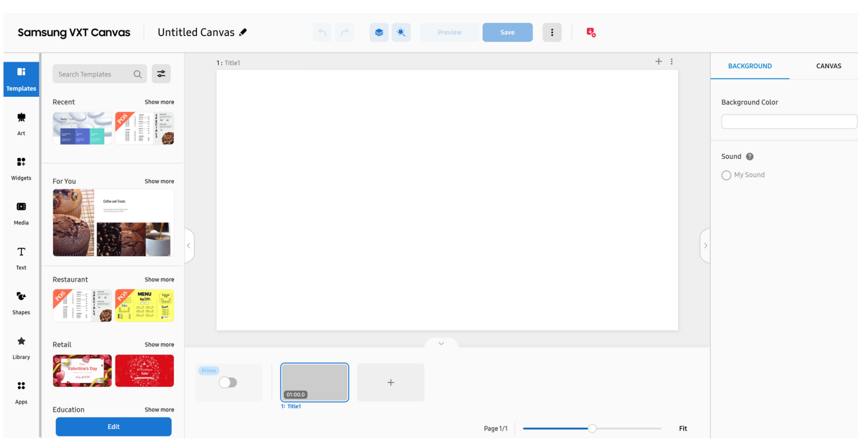


To install Utilix Standard PIRS apps, the user will need to access the VXT Canvas tool. This is accessed via the Content button on the VXT dashboard.

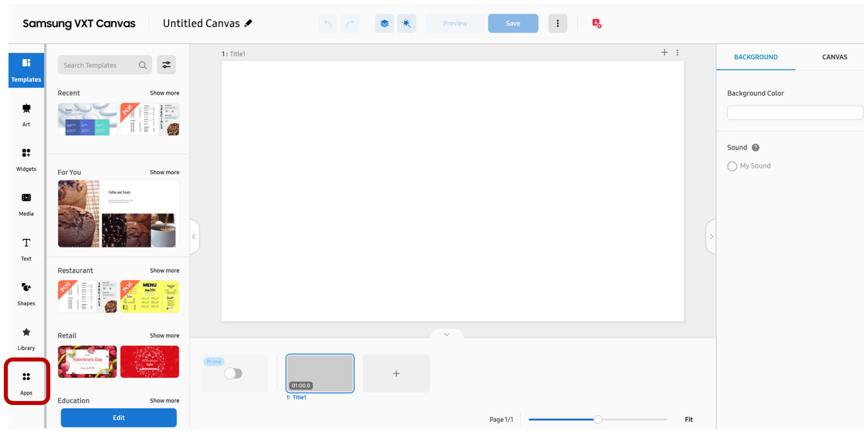


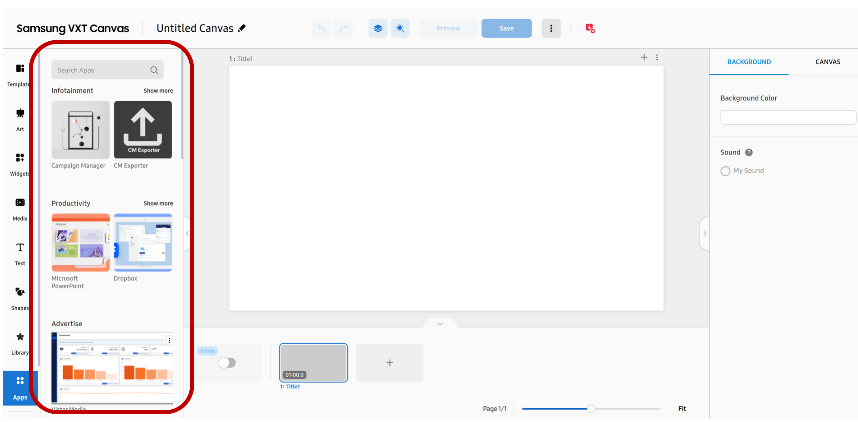
3. Inside the Content library, the user will need to select the Create Content button to launch the VXT Canvas tool. This will open in a new browser tab.



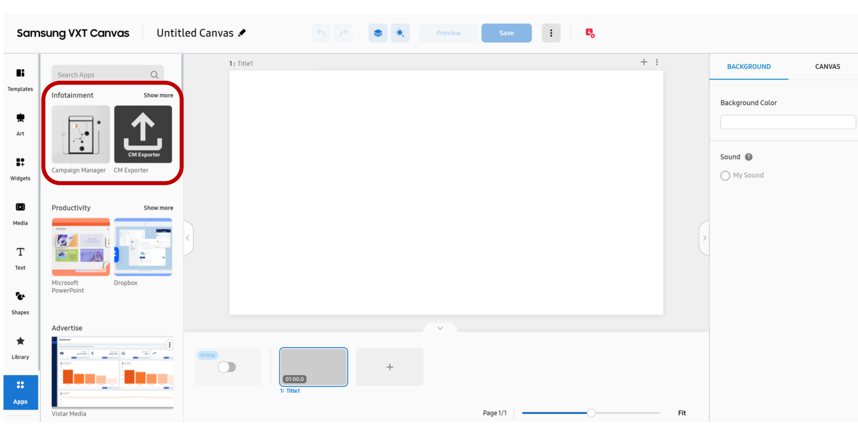


Inside the Canvas tool, the user will need to select the Apps tab from the lower portion of the left-hand menu. This will display the PIRS app store.

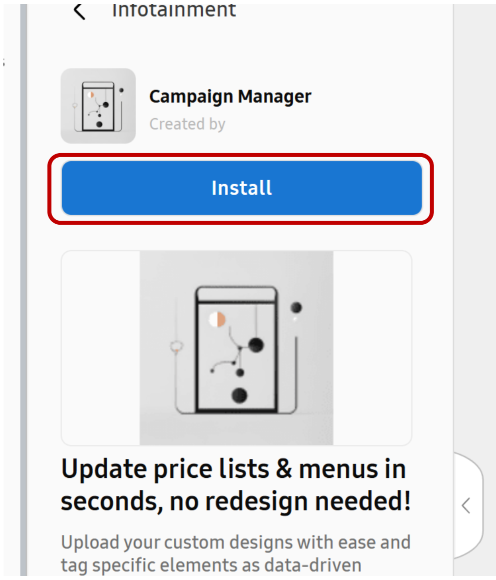




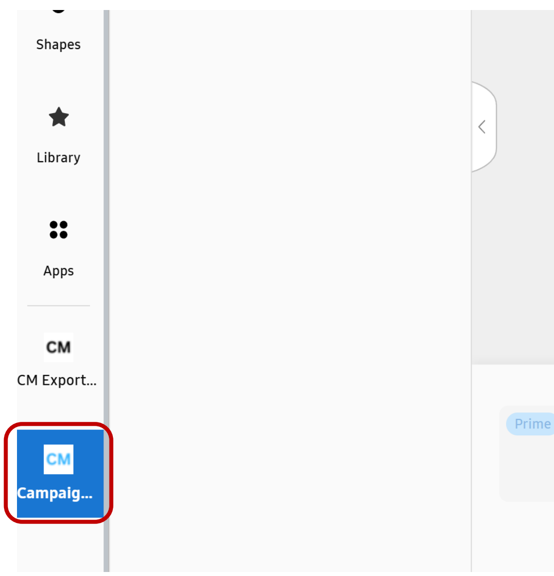
4. In the PIRS App Store, under Infotainment, the user will need to select the Utilix app.



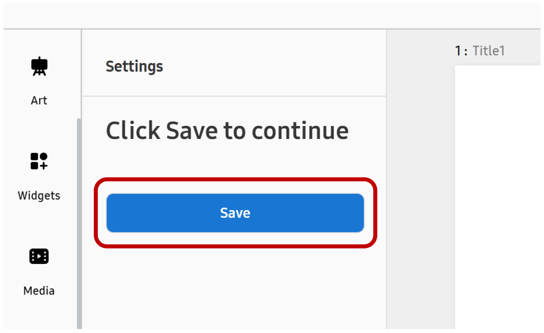
Next, the user will need to click the button for Install under the Utilix app, which is displayed after selecting the app from the App Store.



This will install the Utilix PIRS app into the user's VXT instance. The icon will appear on the left below the Apps icon.



5. Click the Save button that appears on the app settings window to complete installation.

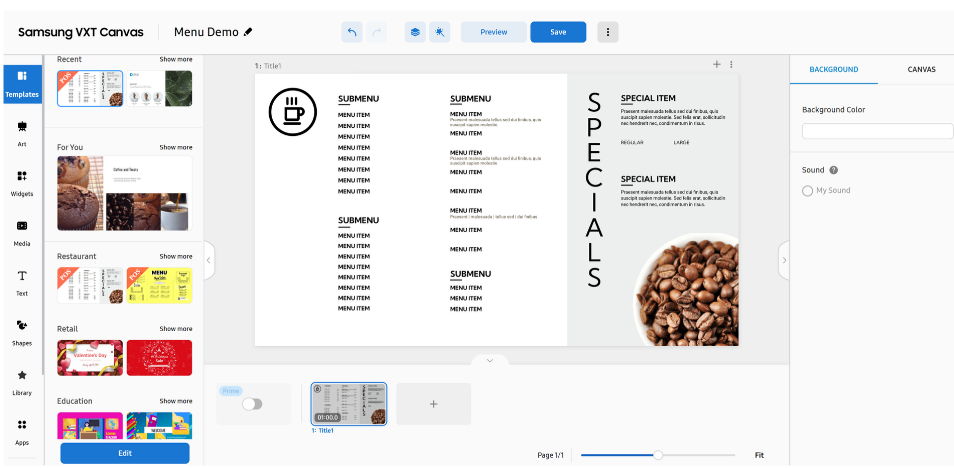


6. Repeat the process with the CM Exporter PIRS App. Both apps are required to use Utilix Standard.

3. Creating Content in VXT Canvas to use with Utilix Standard

Before a user can work with Utilix Standard, content must be built in VXT Canvas. This content will consist of the overall layout that is desired, with any background, branding, graphical elements, or product images.

CM Standard will be used to layer dynamic data (such as prices, descriptions, or calories) on top of the user created templates. Users can also manage content on a location-by-location basis, without having to manually configure each location's content through the CM Standard interface.

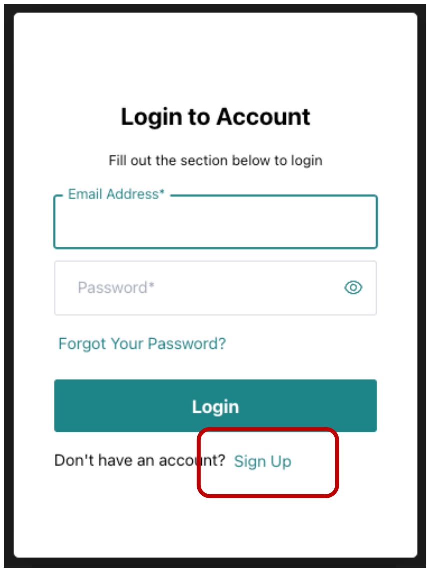


Additional documentation on how to use the VXT Canvas tool to create content to use with Utilix Standard can be found in the VXT web manual [here.](#)

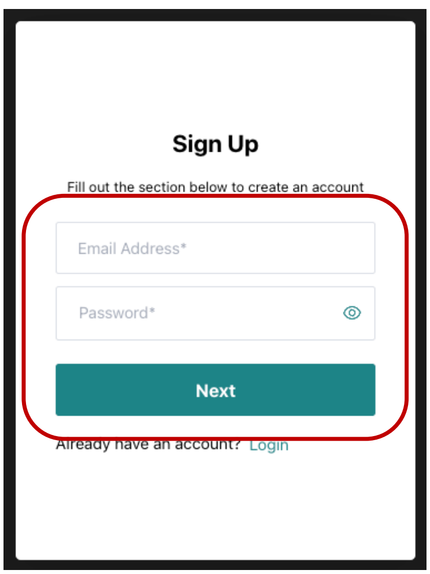
4. Account Registration, Sign In, and Recovery

Utilix Standard is managed through its own portal, [Utilix](#). From here, a new user can register, access, and manage their Utilix account.

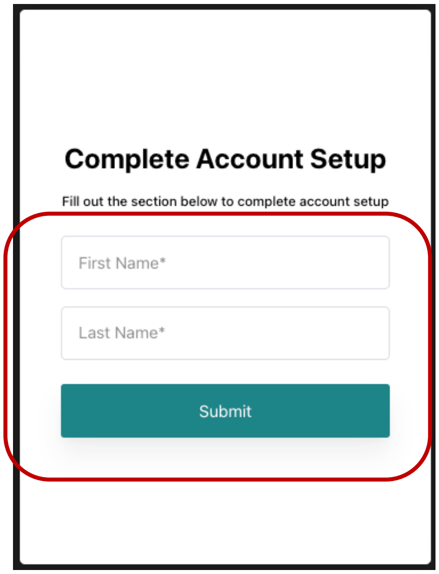
1. To register a new Utilix account, visit the Utilix portal. A login to account window will be displayed. In the lower portion of the window will be a link labeled “Sign Up.” Click this link to begin the registration process.



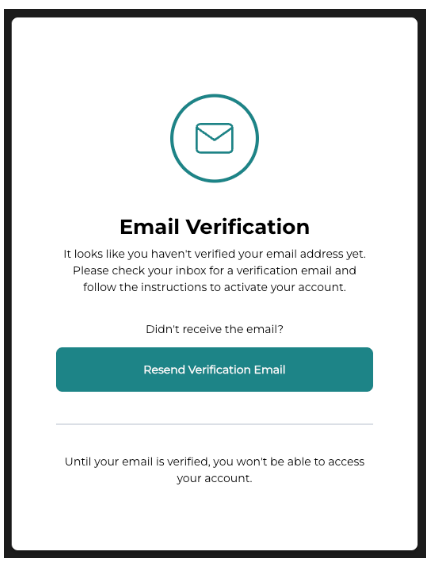
The page will then advance to the next step, and the user will need to enter the email associated with the VXT and CM Standard order, along with the password they would like to use. Click “Next” to advance.

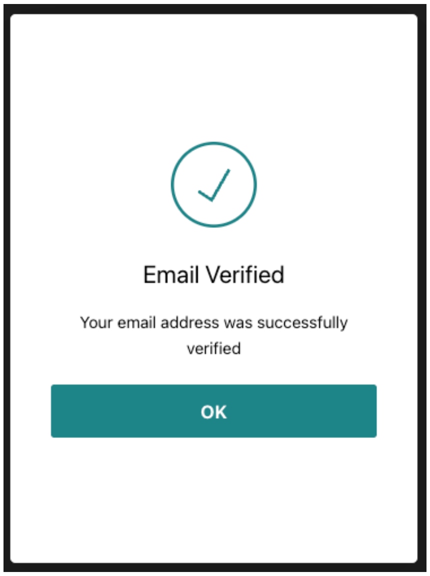


Finally, the user will need to enter the first and last name associated with the person who is the registered owner for the VXT and CM Standard account. Additional users may be created after the account is activated. Click “Submit” to complete account setup.

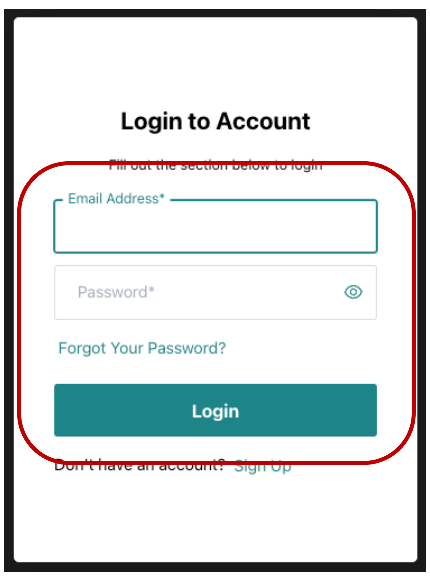


The user who is registering an account will be asked to verify their email address by clicking a link in an email sent to the registered email address. This will complete registration.

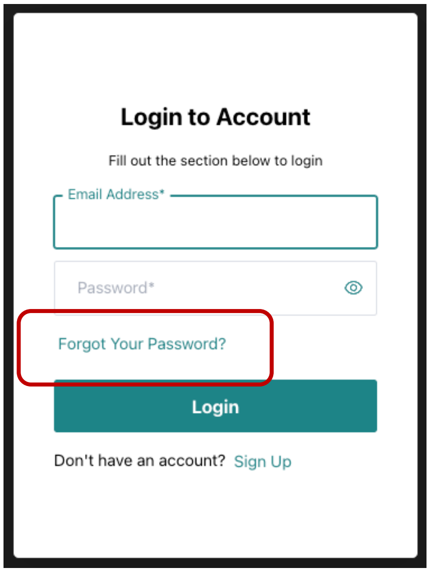




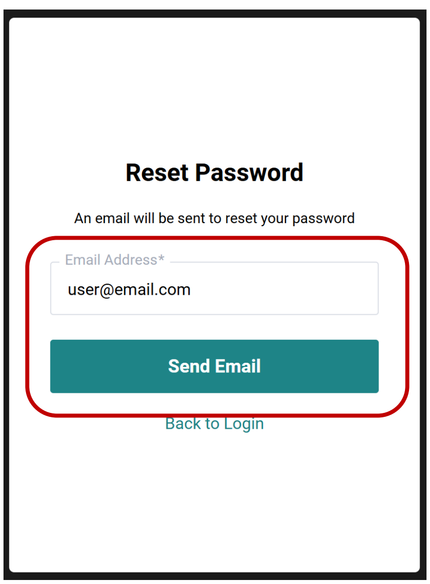
2. Once a user has registered their account, they can log in from the main Utilix web portal using their email address and password created during the registration process.



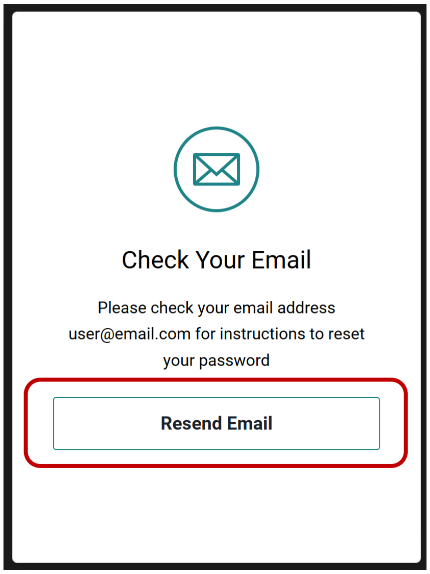
3. If a user ever loses or forgets their password, they can use a recovery link on the login to receive a password reset email to the registered email address.



Enter the email address for the registered email account in the provided field, then select “Send Email.”



The window will advance, verifying the email was sent. If it is not received, the user can click “Resend Email” to send another.

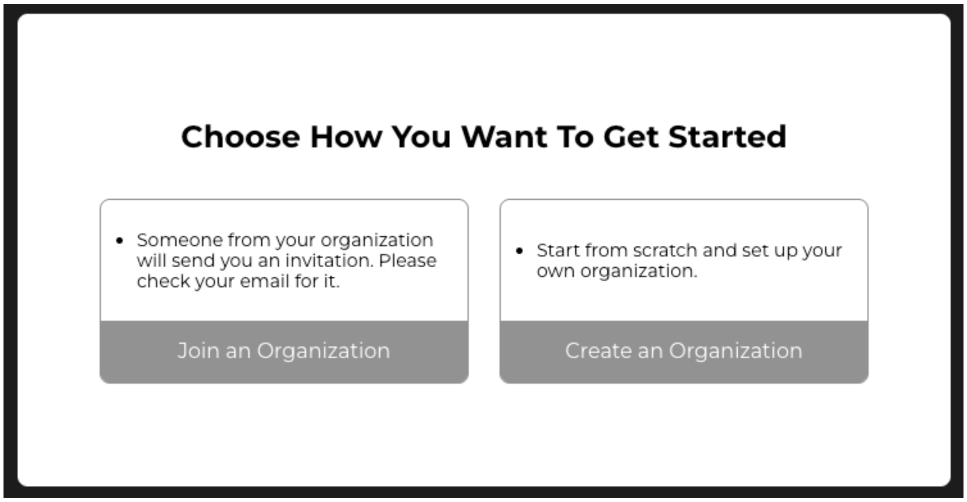


Inside the reset email will be a link to allow the user to reset their password. They may then log in as normal with the new password.

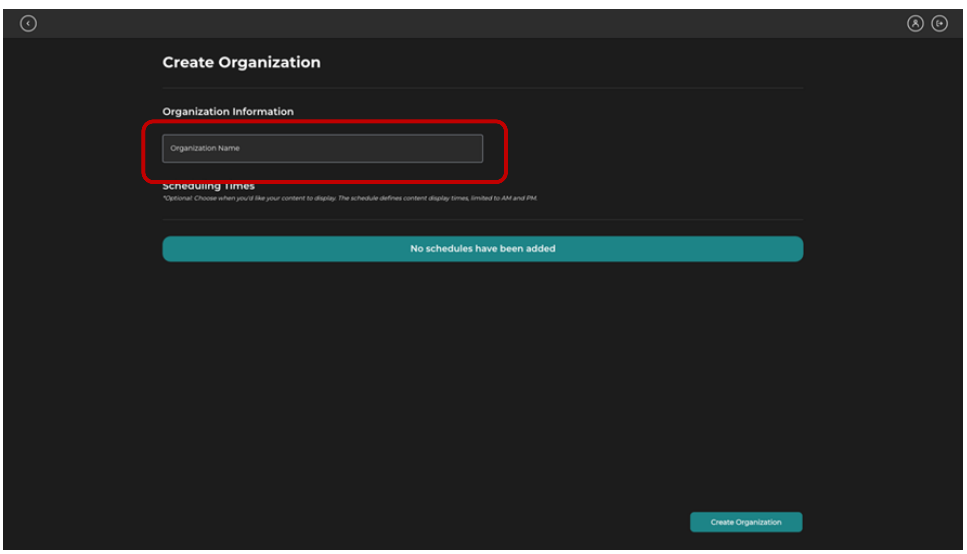
5. Initial Organization Setup for Utilix Standard

Before managing any content, an organization will need to be configured inside the Utilix Standard Portal. Once this is done, the user will have access to all functions, and can create locations, add screens, input data, configure layouts, and transfer content from VXT Canvas.

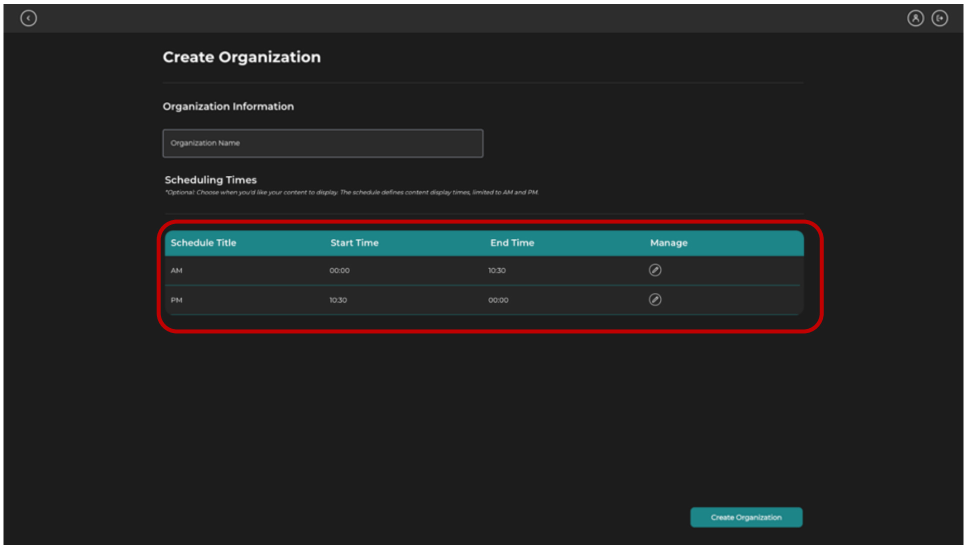
1. The first time a user logs in, they will need to create an organization, unless being invited to an existing one created by another user. Organizations are groups of users, product data, locations, content, and screen layouts for a specific group of locations. Users may be a part of multiple organizations, or leave organizations as needed. This ensures that the organizations meet the operational needs of the business and can manage access to different segments of the system.



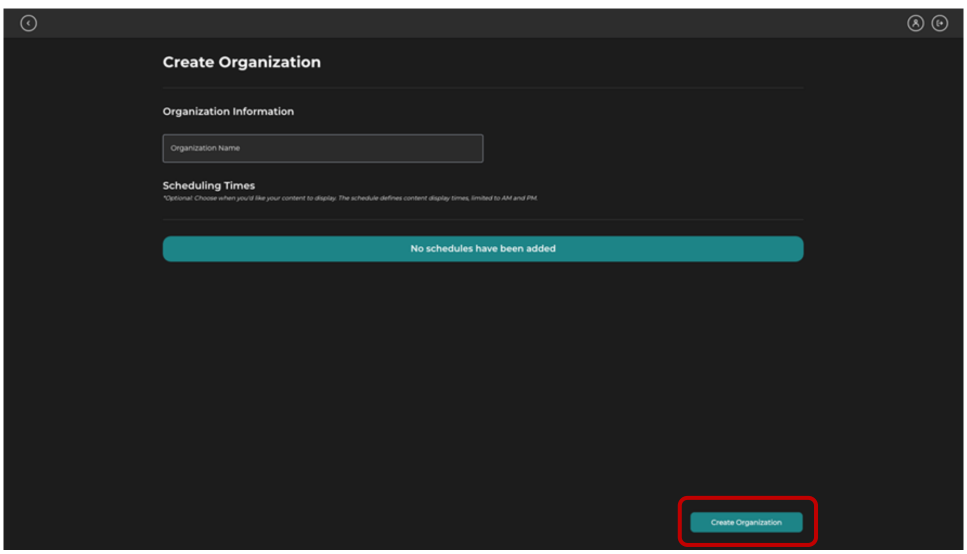
The user should select “Join an Organization” if another user has invited them; this will take them directly into the existing organization. If this is the first user, they should select “Create an Organization.” This will take them to the Create Organization screen to begin setting up their organization.



Enter the desired name for the organization in the “Organization Information” field. If the user prefers, they can click the “No schedules have been added” button to add AM and PM scheduled times (used later with daypart scheduling).

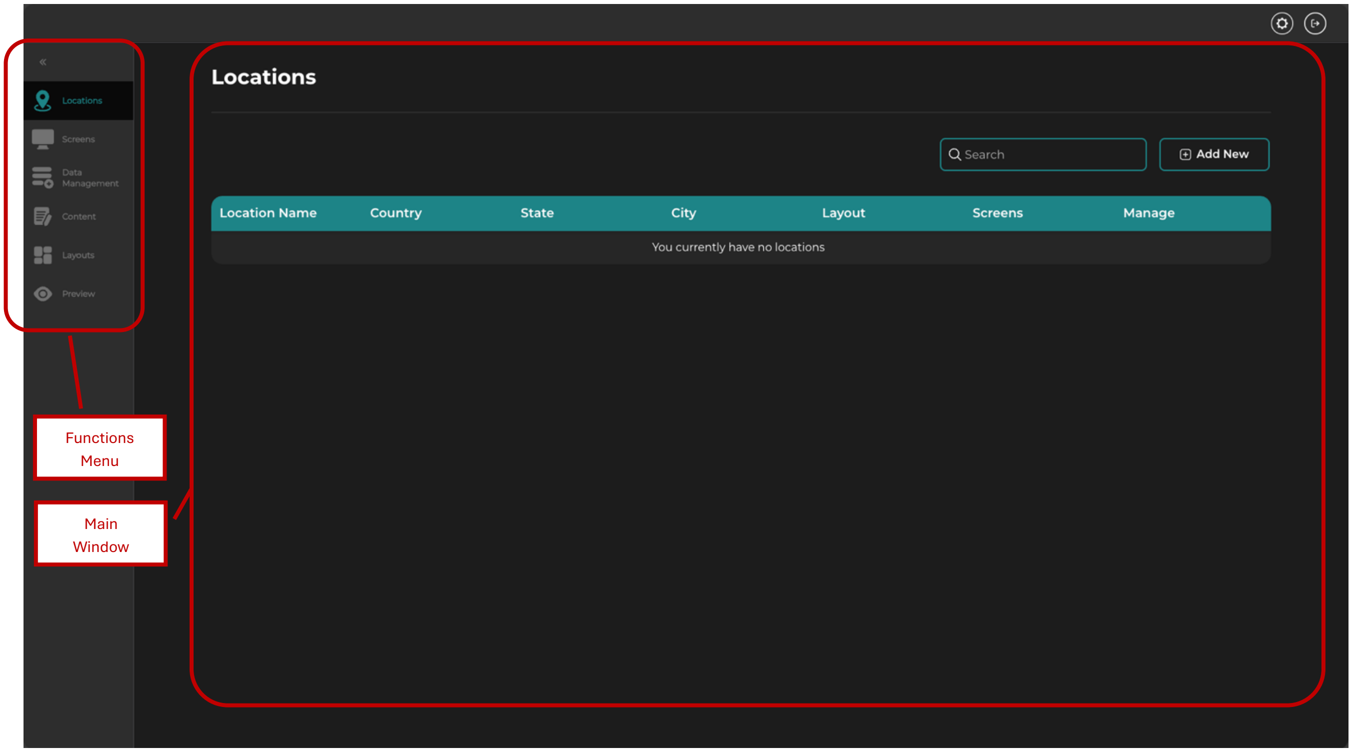


Then selecting the Create Organization button will create the Organization and take the user into Utilix Standard itself.

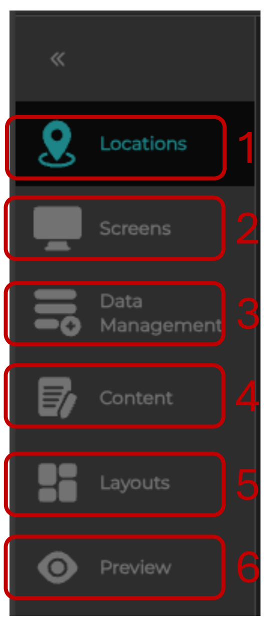


6. Utilix UI Overview

After creating an Organization, or upon logging in to Utilix Standard normally, the user will see this interface. The left side of the window will contain the core functions of CM Standard, with all settings and options appearing on the right side of the window as distinct functions are selected.



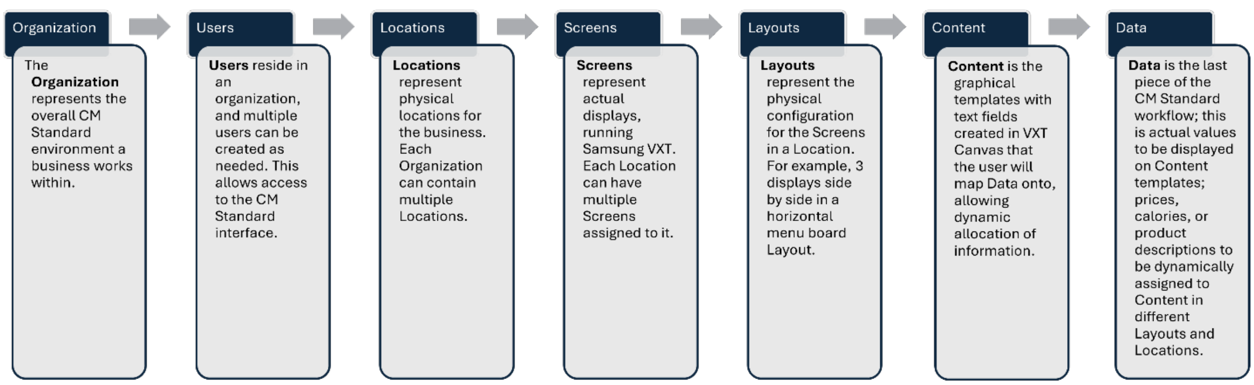
The core functions in CM Standard, from the left-hand menu, are as follows:



1. **Locations** – This is where a user can set up individual business locations, including address, data items linked to this location, screen layouts, and screens.

2. **Screens** – This is where a user can add new screens, manage their location, number, orientation, and view status.
3. **Content** – This is where a user can view content templates imported from VXT Canvas, approve them, assign content to specific screens, and set schedules base on time of day. This allows tailoring content to specific time slots.
4. **Layouts**- This is where a user can set up screen configurations, and map screen numbers to specific portions of a layout for automatic deployment.
5. **Preview** – This allows a user to preview any content being displayed on a given screen, for any portion of the layout, or any portion of the schedule.
6. **Users** – Here, a user can add additional users, approve pending users, or delete existing users from the CM Standard account.

7. Utilix Standard Workflow

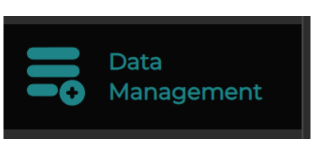


8. Data Management

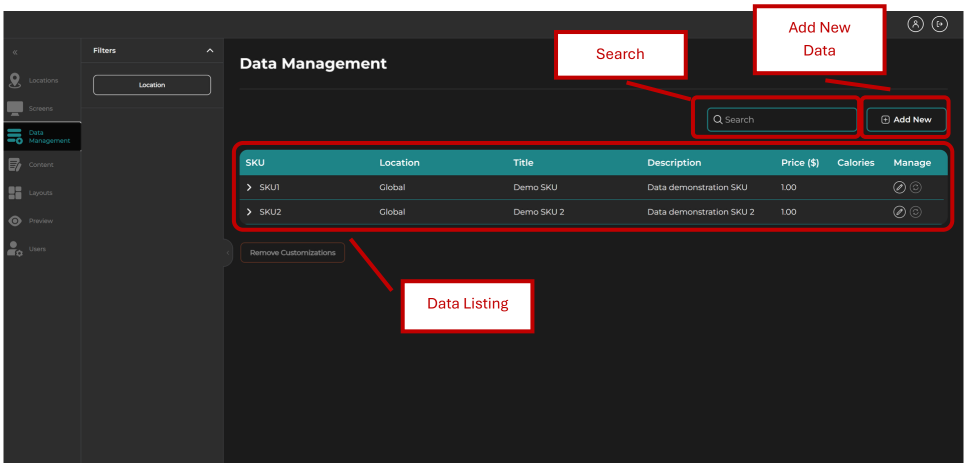
Data Management serves as the repository where users can enter and manage dynamic data for their content templates, such as item names, descriptions, prices, and calories. Users can add, edit, and review data for each item, and data can be used globally, or be unique per Location.

To add new Data items to Data Management:

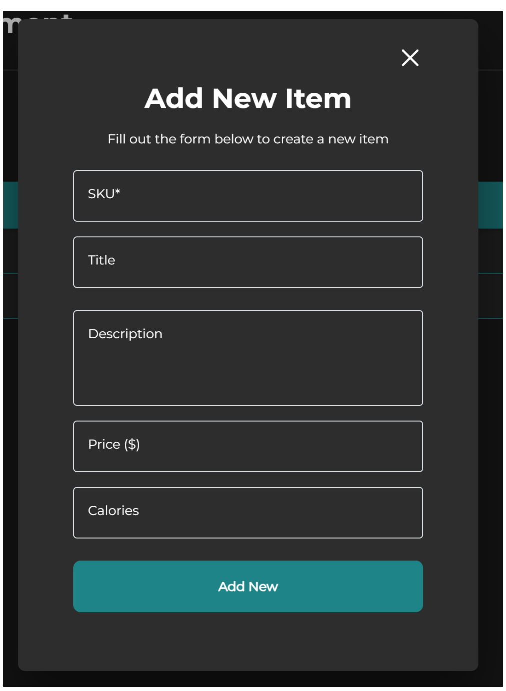
1. Log in to CM Standard and select the Data Management tab.



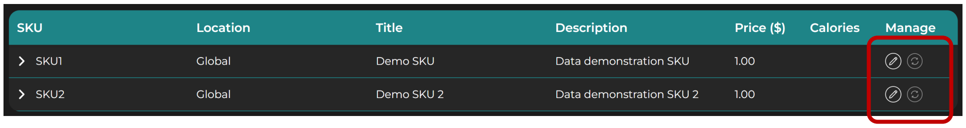
2. On the Data Management page, the user will find a listing of all existing data items by SKU, Location, title, description, price, calories, and an option to manage the data item (edit its properties). There is also a search field, to search for specific data items, and a button to Add New data items.



3. To add a new data item, select the “Add New” button in the upper right. This will bring up the Add New Item dialog box. Here the user will enter the desired SKU, product title (name), product description, product price, and product calories. Once completed, select the “Add New” button at the bottom of the window to add the item to Data Management.

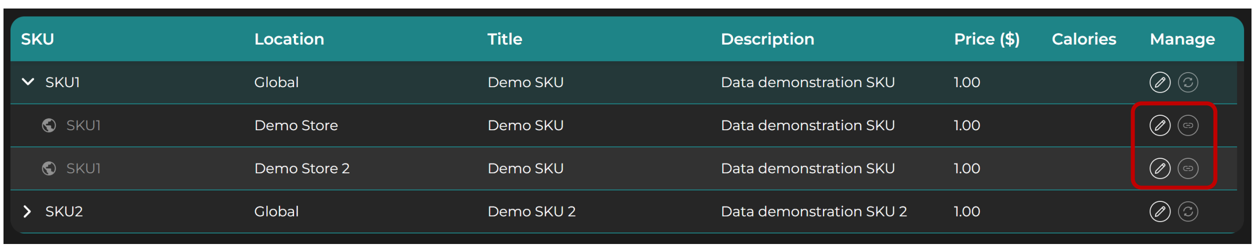


Once data items have been added, the user can edit the global properties (for all locations) by selecting the manage icon on the right-hand side of the data item listing.



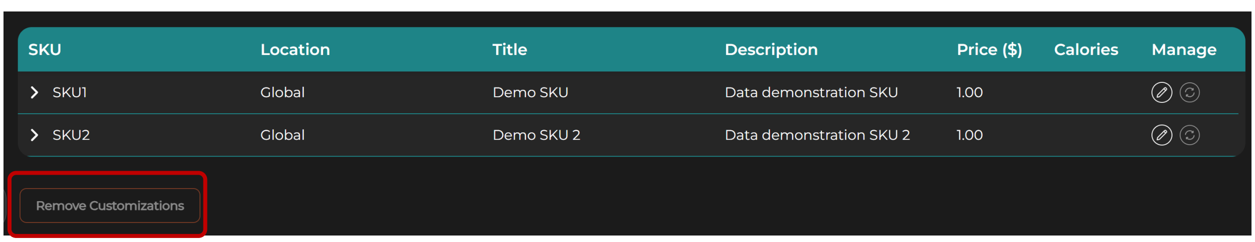
SKU	Location	Title	Description	Price ($)	Calories	Manage
SKU1	Global	Demo SKU	Data demonstration SKU	1.00		
SKU2	Global	Demo SKU 2	Data demonstration SKU 2	1.00		

The chevron to the left of the SKU can be selected to drop down a list of all locations, allowing the user to edit the data item's properties for each unique location. The user can also reset the customization for each location by linking the data back to the global information for that data item.



SKU	Location	Title	Description	Price ($)	Calories	Manage
SKU1	Global	Demo SKU	Data demonstration SKU	1.00		
SKU1	Demo Store	Demo SKU	Data demonstration SKU	1.00		
SKU1	Demo Store 2	Demo SKU	Data demonstration SKU	1.00		
SKU2	Global	Demo SKU 2	Data demonstration SKU 2	1.00		

Users can also reset ALL location specific customizations with the red "Remove Customizations" button in the lower left of the Data Management screen.



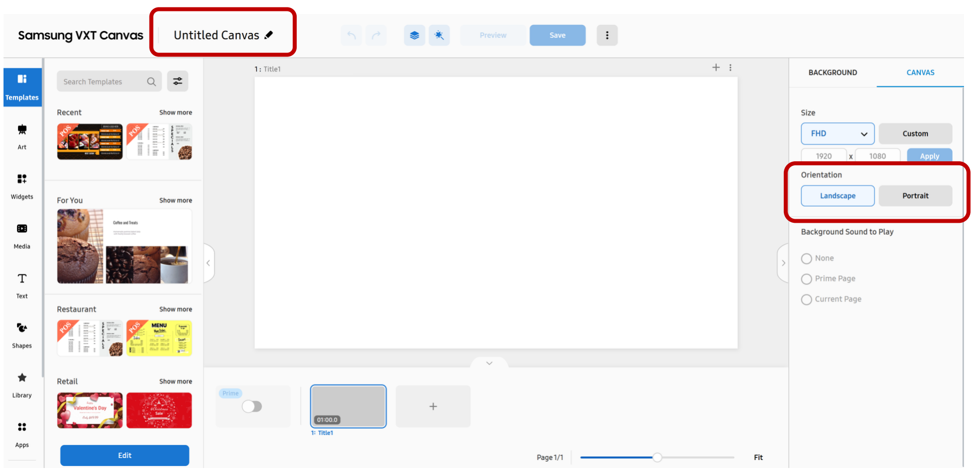
SKU	Location	Title	Description	Price ($)	Calories	Manage
SKU1	Global	Demo SKU	Data demonstration SKU	1.00		
SKU2	Global	Demo SKU 2	Data demonstration SKU 2	1.00		

9. Adding and Managing Screens

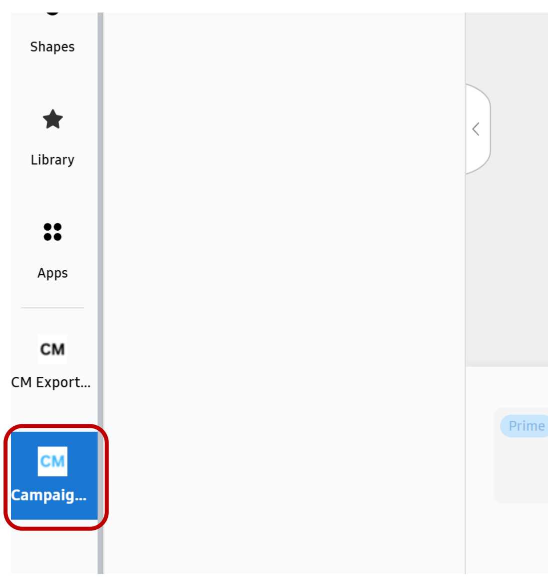
The Screens page will allow the user to activate, configure, and manage their VXT CMS powered displays within Utilix. Users can organize screens by assigning them to specific locations, setting the display orientation, and managing their position in layouts. Screens are linked to Utilix Standard through the use of VXT Canvas and the Utilix PIRS app.

To pair a VXT enabled display to Utilix Standard:

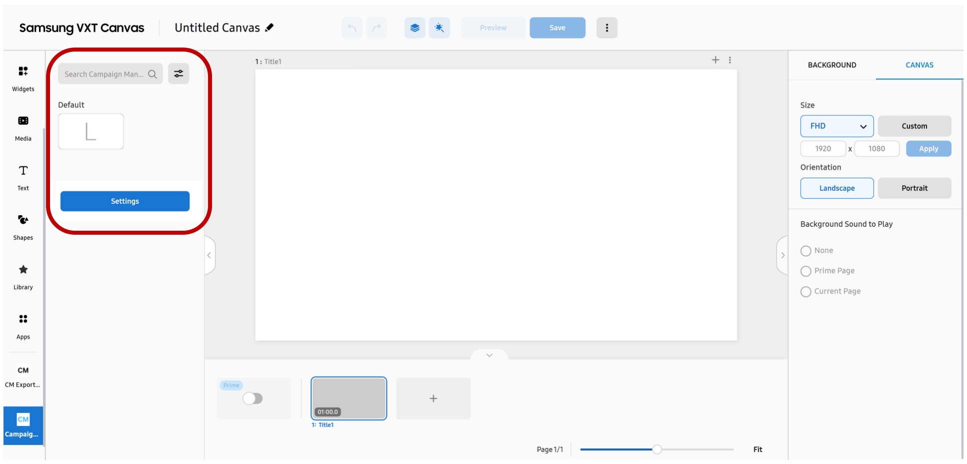
1. Open the VXT CMS and launch the VXT Canvas tool. Start with a blank Canvas file. On the far right, under the Canvas tab, the user can select if the screen will be portrait or landscape. Use the pencil icon near the top right to give the Canvas file a unique name.



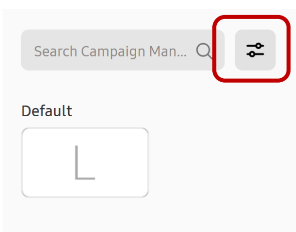
2. On the left-hand side menu, scroll down below the Apps icon, to Utilix. Select the icon.

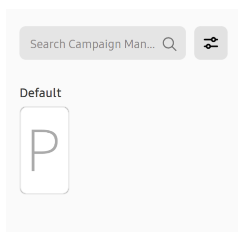


3. This will display the Utilix app widgets.

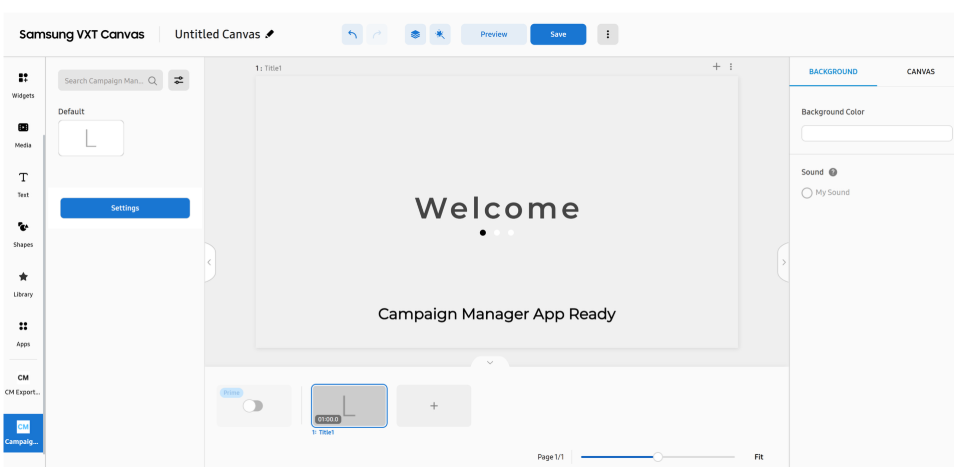


The user may change the widget orientation (represented by an L for Landscape or P for Portrait on the widget icon) using the settings icon next to the search box.

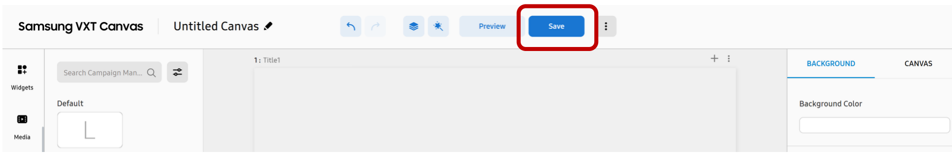


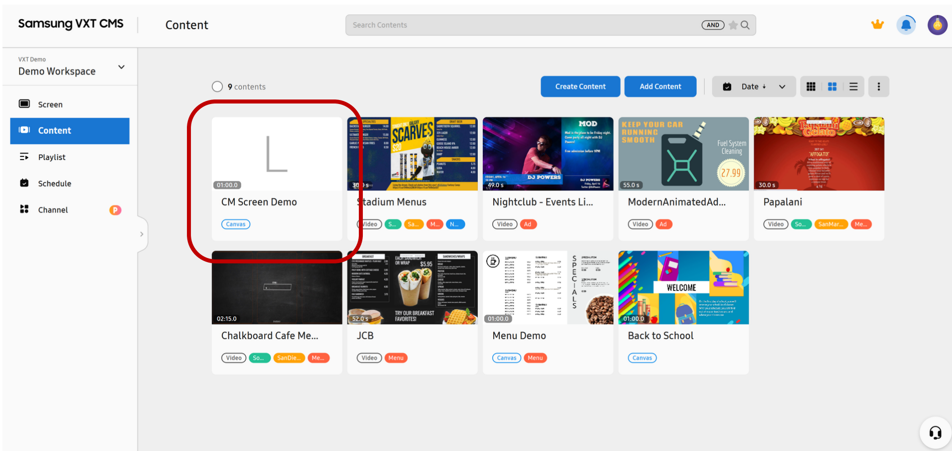


4. Drag the Utilix widget into the blank Canvas Page. It will automatically become full screen on the Page. A “welcome” message will be displayed, with a notification that the Utilix app is ready.

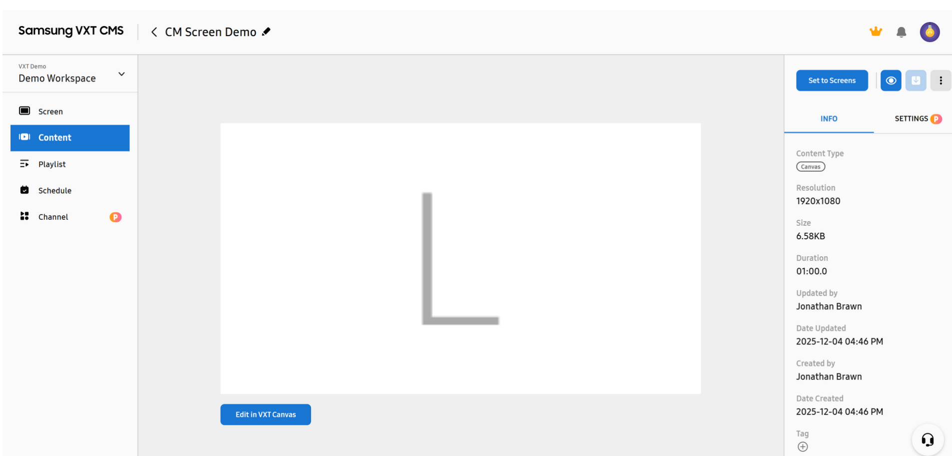


5. Save this Canvas file by clicking the blue Save button in the upper right of the top menu bar. This will save it to the user’s VXT CMS account under Content.

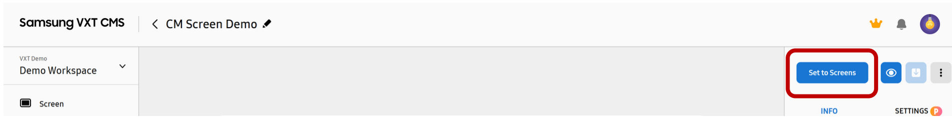




6. Next, the user will need to deploy the Utilix app Canvas file to a desired screen or group of screens. In the Content library, click on the CM Standard Canvas file created previously. This will display its properties and settings.



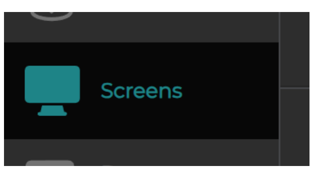
In the upper right, select the "Set to Screens" button. This will bring up the Set to Screens window. Select the radial button in the upper right corner of each screen tile, representing the screen or screens that this Canvas file should be deployed to. Then select the "Publish" button in the lower right corner of the screen.



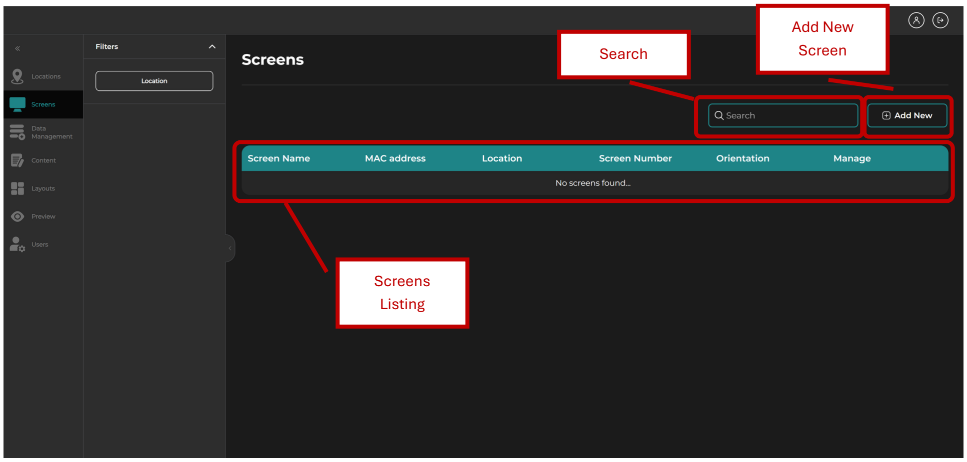
Once publishing is complete, the screen or screens will display a solid white screen with a welcome to Utilix message, along with a 6-digit pairing code.

Once the screen has been paired with Utilix Standard from VXT Canvas, the user will need to add the display to CM Standard using its interface.

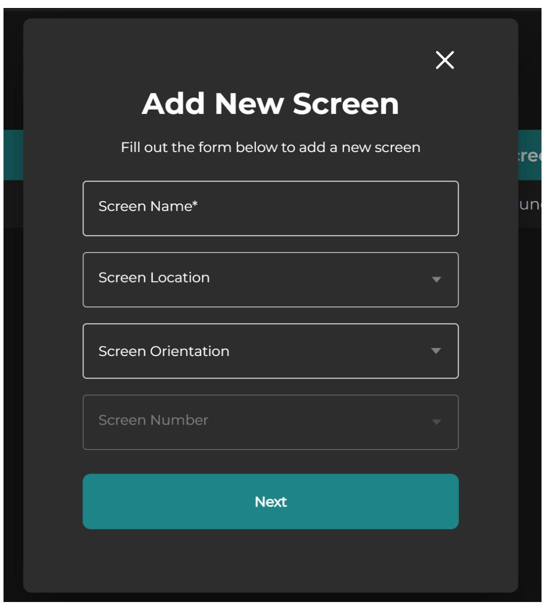
1. Log in to CM Standard and select the Screens tab.



2. On the Screens page, the user will find a listing of all existing screens by name, as well as MAC address, location, screen number, orientation, and an option to manage the screen (edit its properties). There is also a search field, to search for specific screens, and a button to Add New screens.



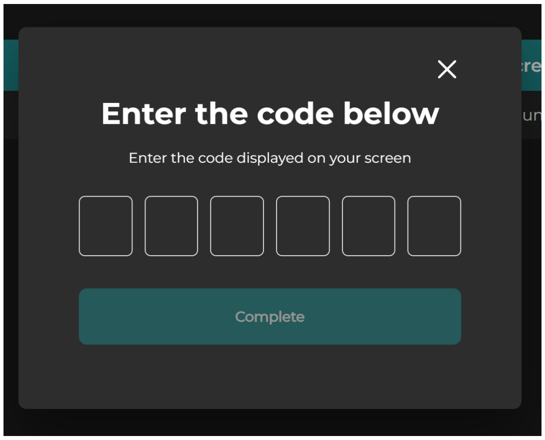
3. To add a new screen, select the “Add New” button in the upper right. This will bring up the Add New Screen dialog box.



On this dialog, the user needs to give the screen a unique name, select what Location the screen resides within, and what orientation it is in (landscape or portrait). The user also needs to give the screen an identifying Screen Number. This will be used to match the screen with specific data within Layouts. Once done, select the “Next” button.

4. This will advance to a dialog box to actually pair the screen using the six-digit code displayed by the CM Standard app on the running VXT Canvas file on the screen

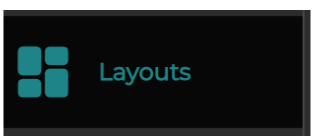
itself. Enter the code and select the "Complete" button to add the screen. It will now be ready to use.



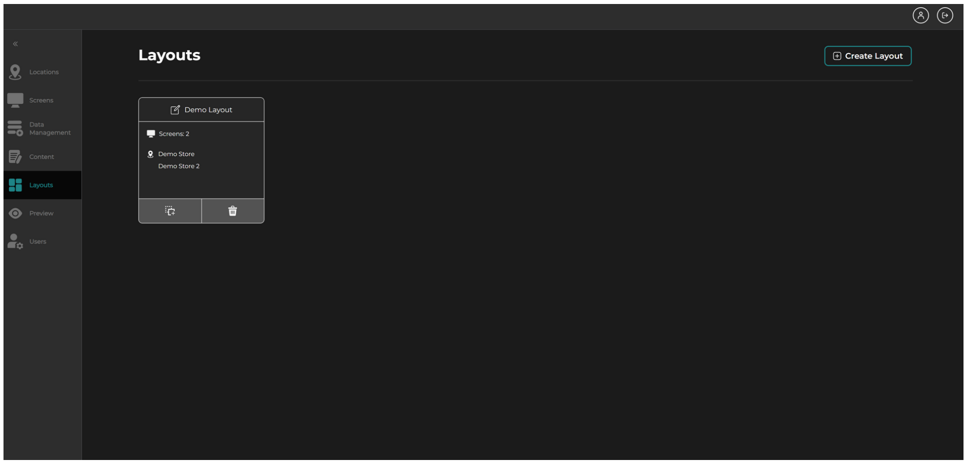
10. Creating and Managing Layouts

Layouts are used to define screen configurations, then to map and deploy content to Screens. To create a anew Layout, the user will need to do the following.

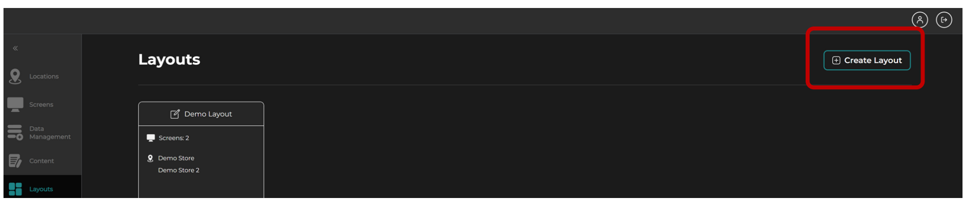
1. Log in to CM Standard, and select the Layouts tab.



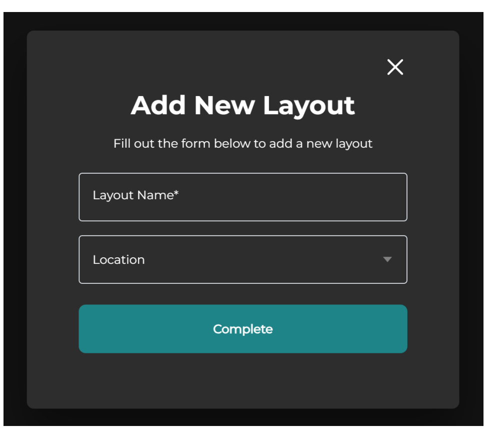
2. On the Layouts page, the user will find a tile representing each existing layout. The tiles will have the Layout name, and a listing of how many Screens are in each Layout, along with any Locations this Layout is mapped to. There will be a button to edit the Layout, a trash can icon to delete the Layout. Clicking the name of the Layout will also allow the user to change the Layout's settings.

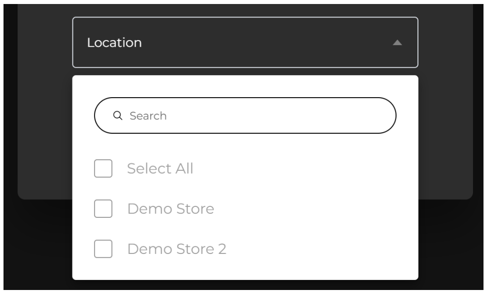


3. To create a new Layout, the user will click the Create Layout button in the upper right corner of the Layouts screen.

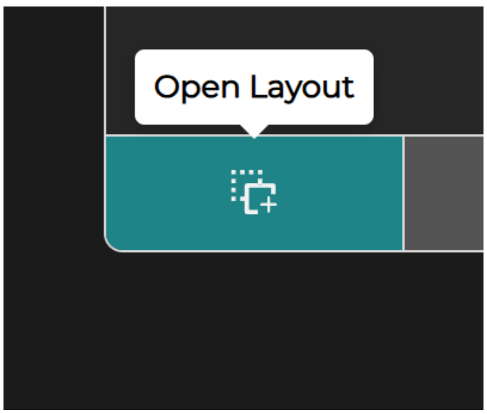


4. This will bring up the Add New Layout dialog. The user will need to create a unique name for this Layout, and then using the Location drop down, assign what Locations this Layout will be mapped to. More than one location can be selected. The user can also search locations or select all. Once done, the user will click the "Complete" button, and the Layout will be added to the management screen as a tile.

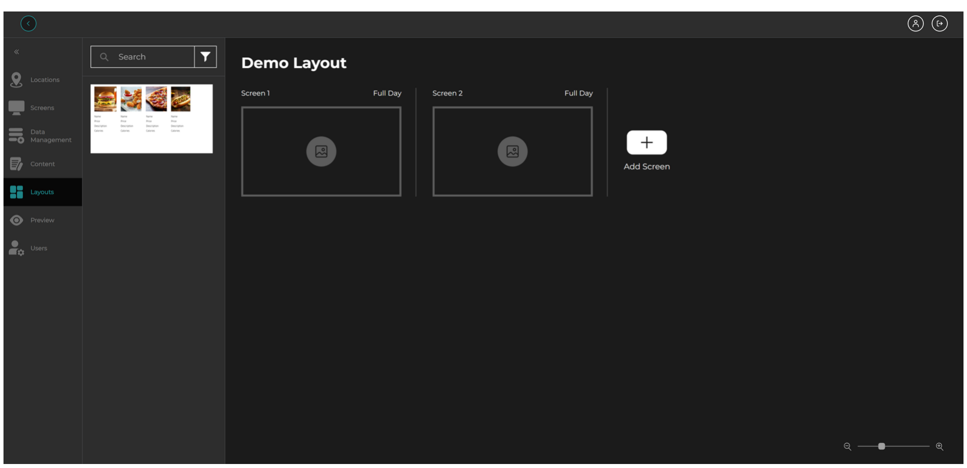




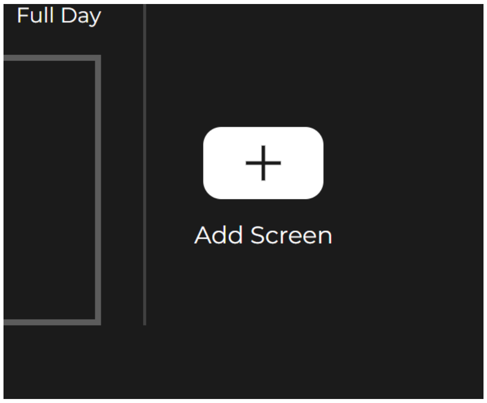
5. To edit the newly created Layout, the user will select the Open Layout button in the lower left corner of the Layout's tile.



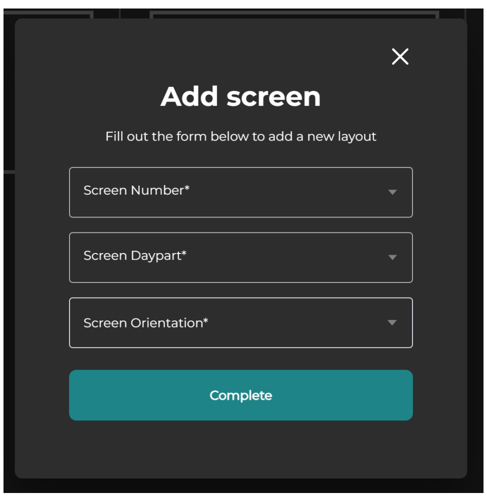
6. This will bring up the Layout Editor screen. Here, the user will see any screens added to a layout, be able to add Screens, delete Screens, clear added Content, or map Content to specific Screens in the Layout.



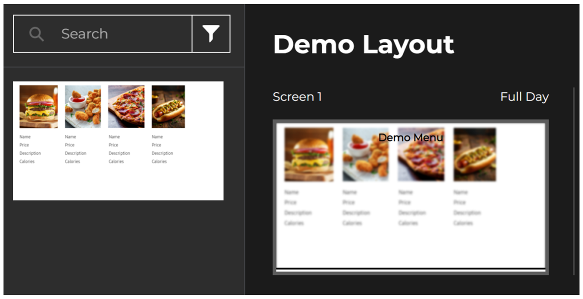
7. To add a screen, click the plus icon labeled Add Screen to the right of the Layout Editor.



8. This will display the Add Screen dialog box. The user will assign a unique Screen number (used to identify and position this Screen in the Layout), what type of Daypart they want this screen to use (All day, or AM/PM using the schedule defined for the Location), and what the orientation of this screen will be. Once done, they will click the "Complete" button.



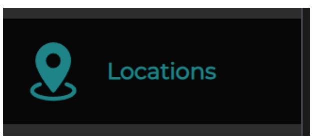
9. After the Screen has been added to the Layout, the user can drag and drop Content from the menu on the left-hand side of the Layout Editor onto each Screen to map that Content to the Layout. This will then show the Content as a preview on the Screen inside the Layout.



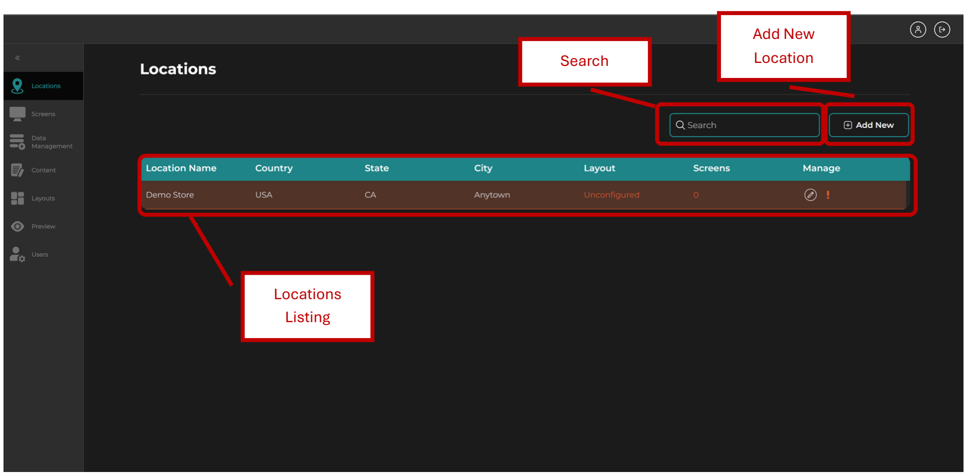
11. Creating and Managing Locations

Locations are used to represent actual physical locations where a display will reside. This allows users to create, edit, and view multiple locations, as well as adding screens and layouts. To add a new Location, the user will need to do the following.

1. Log in to CM Standard, and select the Locations tab.

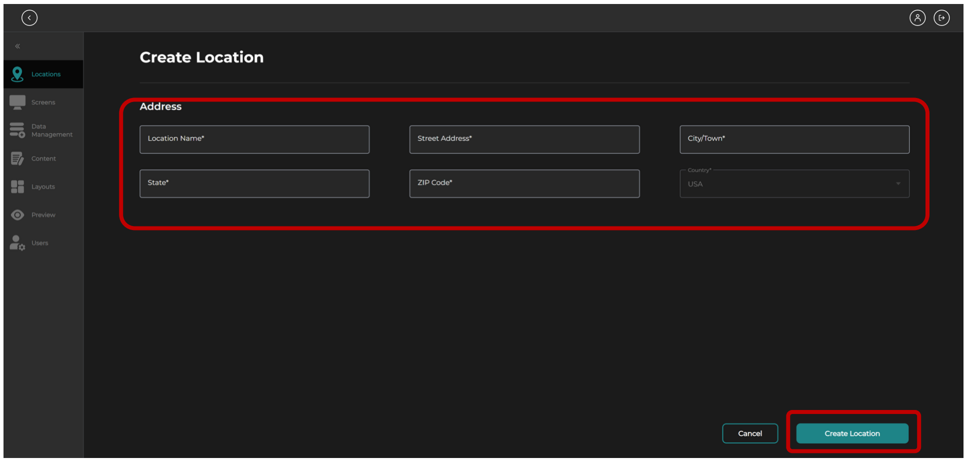


2. On the Locations page, the user will find a listing of all existing Locations by name, Country, State, City, as well as Layouts and Screens, with an option to manage the Location (edit its properties). There is also a search field, to search for specific screens, and a button to Add New Locations.



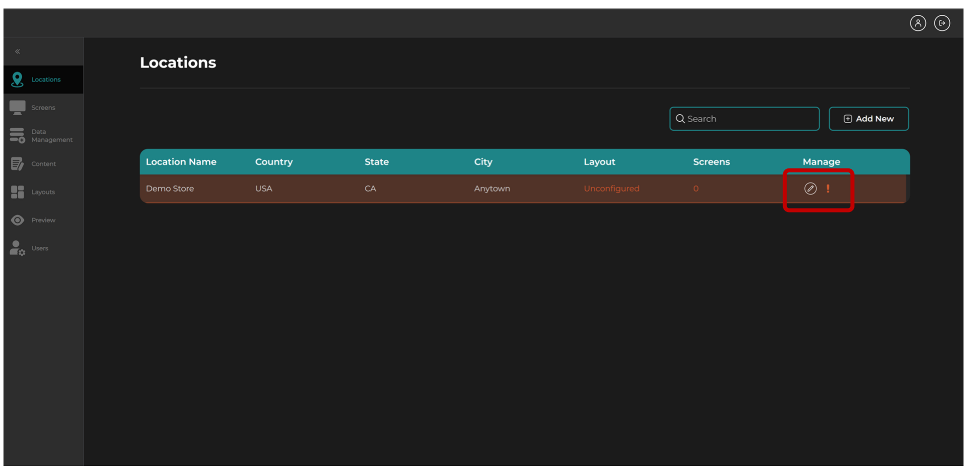
3. To add a new Location, select the "Add New" button in the upper right. This will take the user to the Create Location page. Here the user will enter the Location Name,

Street Address, City, State, and Zip Code. Select the “Create Location” button to add the Location to the Organization.

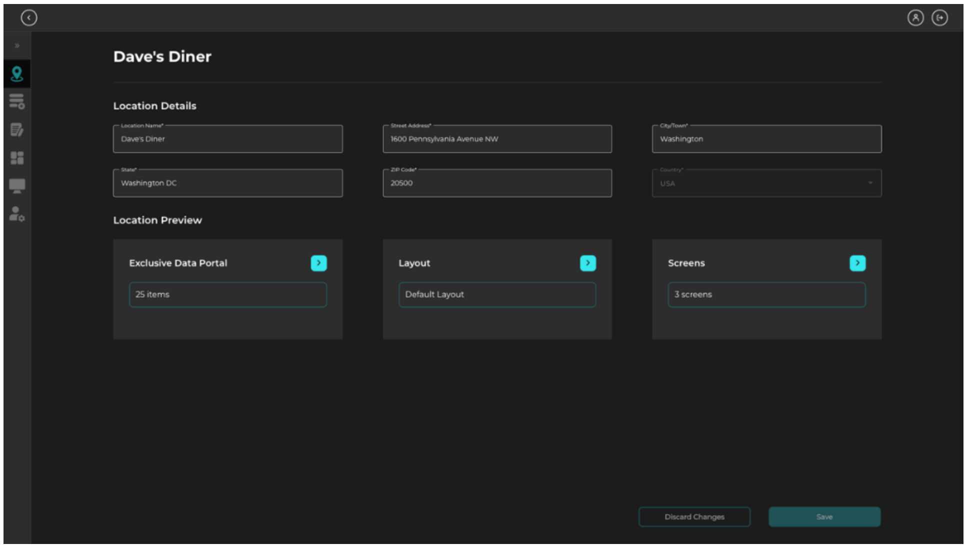


Once the Location has been added, the user needs to assign it Layouts, Data, and Screens.

1. Select the Manage icon for the Location to enter its properties.



2. On the Location’s properties page, the user can edit any of the address information for the Location, as well as link to Data, Layouts, or Screens tabs within CM Standard.

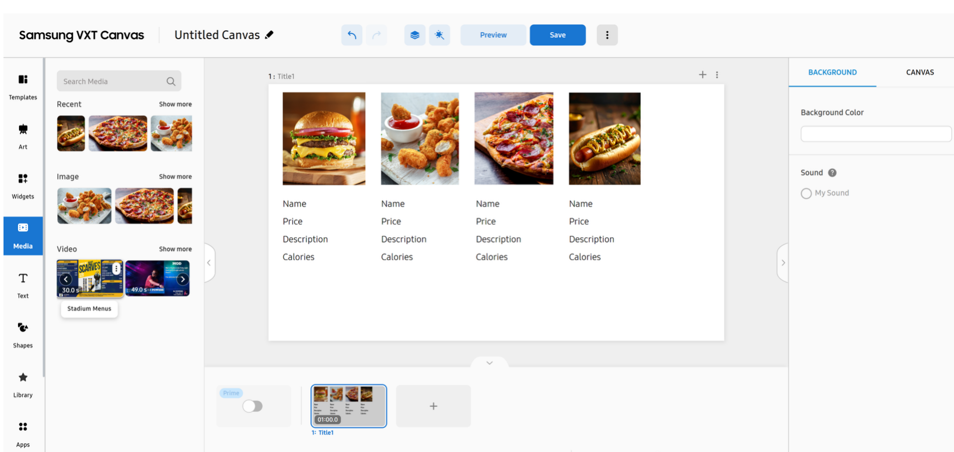


12. Exporting Canvas Content from VXT to Utilix

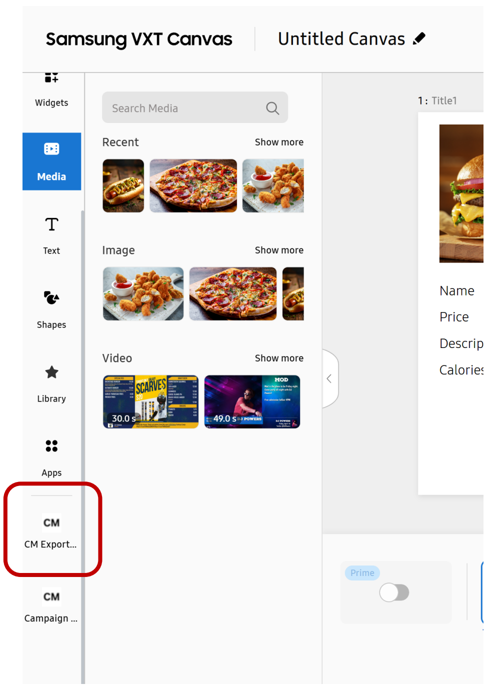
After a user creates a content template in VXT Canvas, it needs to be exported to Utilix Standard to have dynamic content mapped to it, and then to assign it to locations and screens. To export content from VXT Canvas to CM Standard, the user will add the CM Exporter element to their template, from the previously installed CM Exporter PIRS app.

PLEASE NOTE: Canvas templates to be used in CM Standard should consist of photos and text (to use as placeholders for mapping dynamic images). Pixabay images, videos, Canvas widgets, websites, and templates will not be exported.

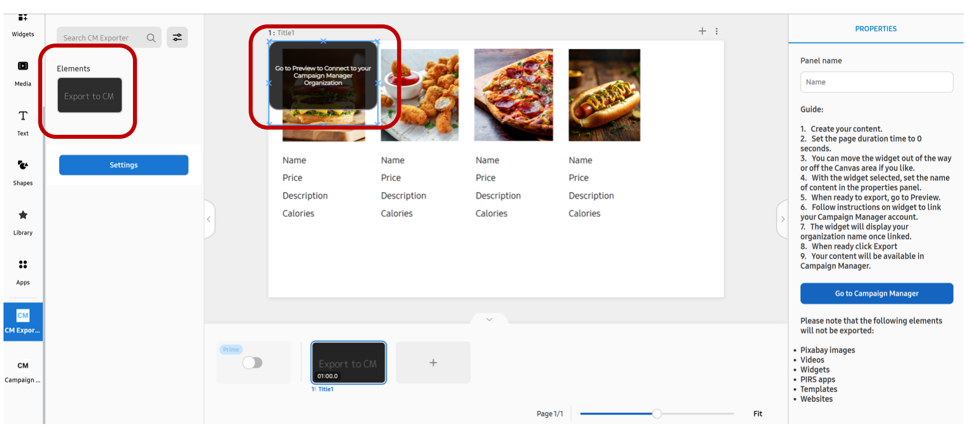
1. Edit the desired content template in VXT Canvas.



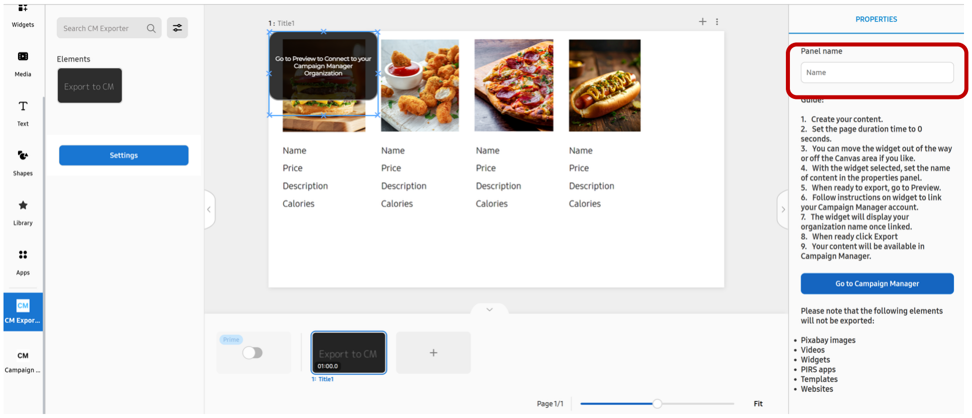
2. On the left-hand side of the Canvas window, scroll down below the PIRS app store, to the installed CM Exporter app icon, and select it. This will activate the CM Exporter.



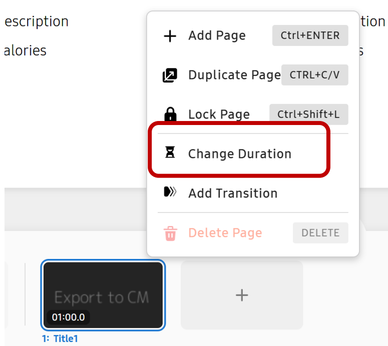
3. Once the user has clicked on CM Exporter in the left-hand menu, the CM Exporter widget will appear, along with a guide to review the export process on the right-hand side. Click on the Export to CM widget, which will create a CM Exporter widget on top of the user's Canvas template.



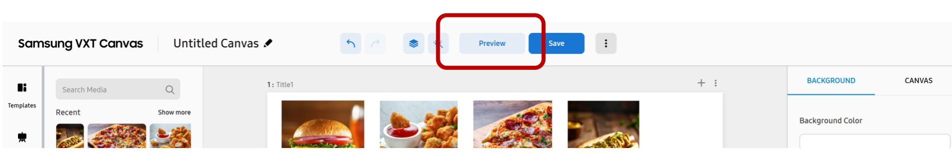
4. On the right-hand side of the screen, enter a unique name for the template, to be used for organizing and managing it in CM Standard.



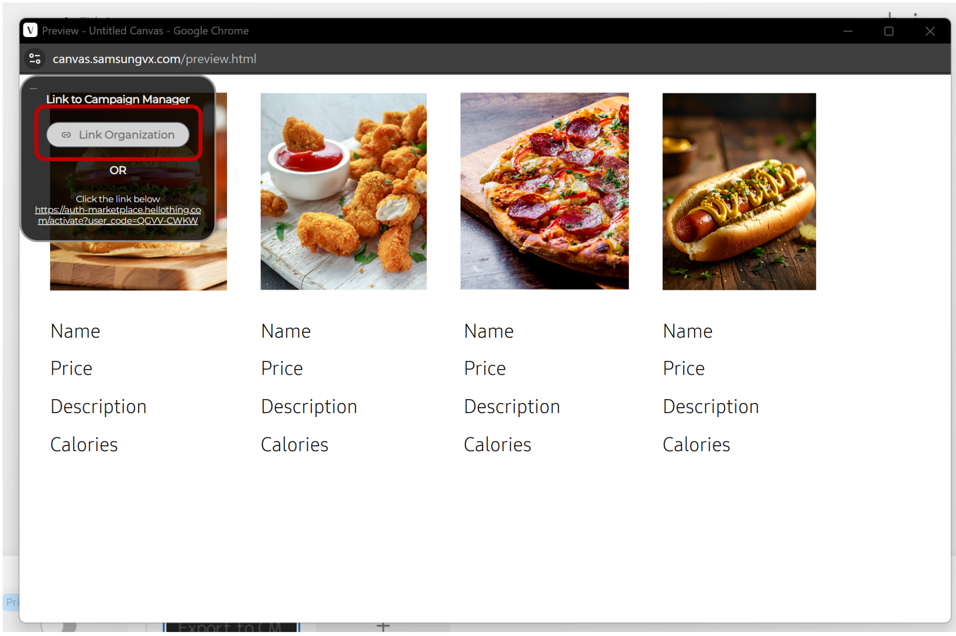
5. Ensure the Duration for the page is set to 0 seconds using the menu in the page line at the bottom of the screen. If correctly set, the duration will display "infinity" with an infinity symbol.



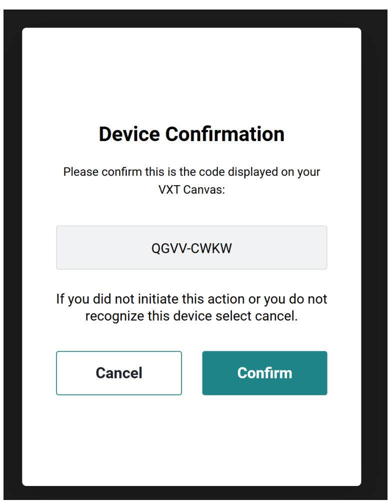
6. With the CM Exporter widget selected, click "Preview" in the top menu of the Canvas page for the Canvas template to be exported to CM Standard.

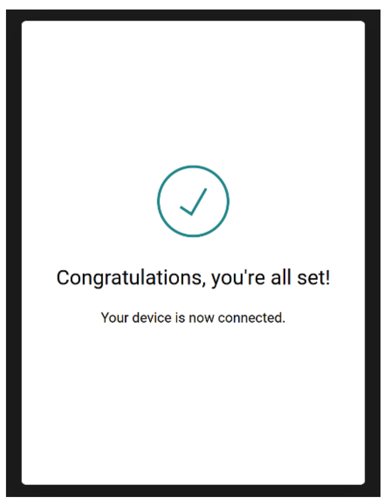


7. A new window will appear, showing the preview of the Canvas template. The CM Exporter widget will show a button to link to the user's CM Standard Organization.

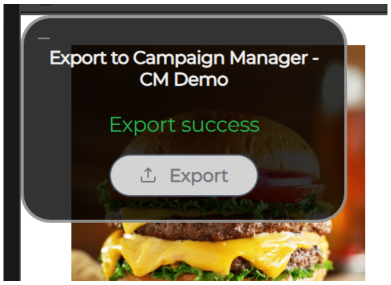


8. Once "Link Organization" has been clicked, a new CM Standard web page will appear, showing an eight-character verification code – this will match what is shown on the preview of the Canvas template. If correct, click the "Confirm" button.

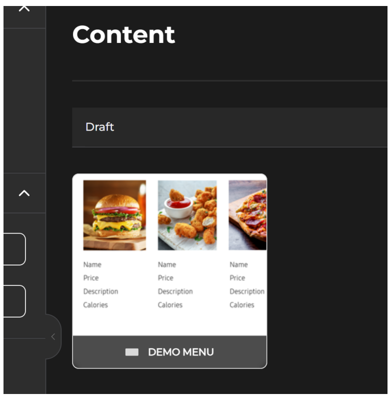




9. Once the content verification has been confirmed, the button for "Link Organization" on the Canvas preview window will change to "Export". Click the Export button to finish exporting the content into CM Standard. The widget will show "Export success" when complete.

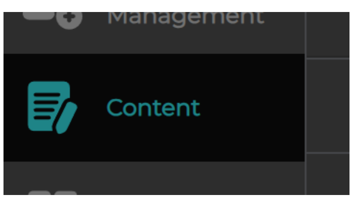


10. The content will now be available as a Draft in CM Standard.

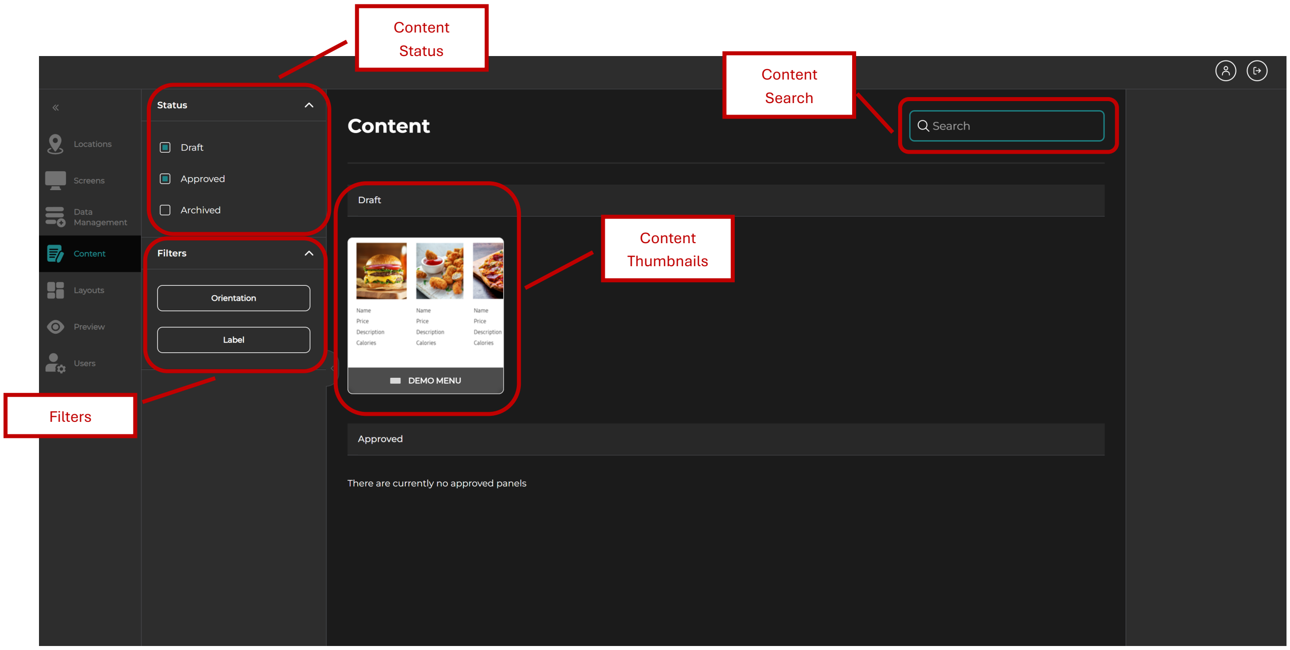


13. Content Management

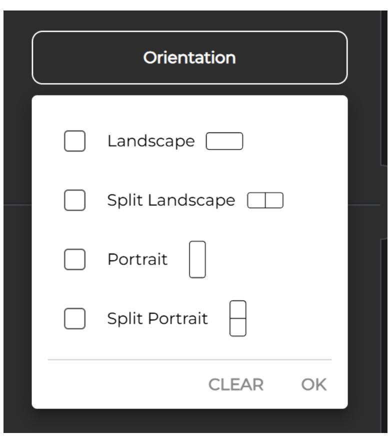
To view the available content items, or to map Data elements to content for dynamic assignment, log in to CM Standard and select Content from the left-hand side menu.



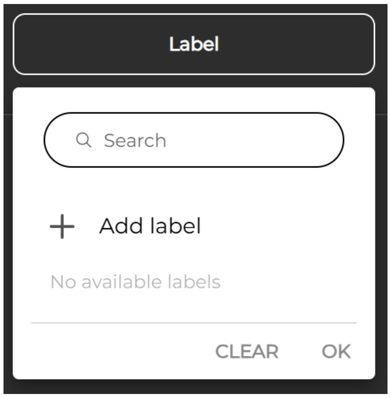
The content window will have check boxes to sort by Content type (Draft, Approved, and Archived). The user will also have buttons to filter by content orientation (landscape or portrait) and any Labels that have been added to the Content. There is also a Search field in the upper right to search the Content library. Thumbnails for content items will be shown in the main part of the screen, sorted by Draft, Approved, or Archived (if checked in the upper left Status menu) along with a label based on the content name defined in the Export process.



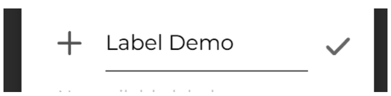
If the user clicks the button for “Orientation” a pop-up menu will appear, allowing them to sort by the orientation types.



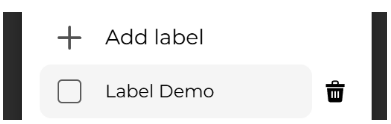
Clicking the “Label” button will also provide a pop-up menu to search, add, or select Labels. Labels are used to organize and sort content inside CM Standard.



If the user clicks the “plus” button next to “Add label”, it will become an editable text field, where the user can enter the desired Label. Clicking the check mark icon will add the label.



For all created Labels, a check box will appear to their left-hand side, clicking the check box will select that Label. Multiple Labels can be selected at once. A Label can be deleted using the trash can icon to the right of the Label.

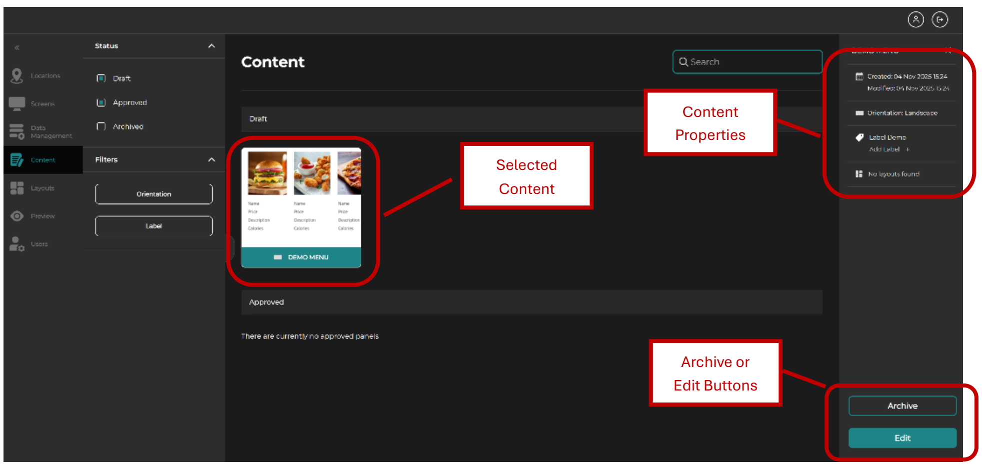


14. Mapping Data to Content

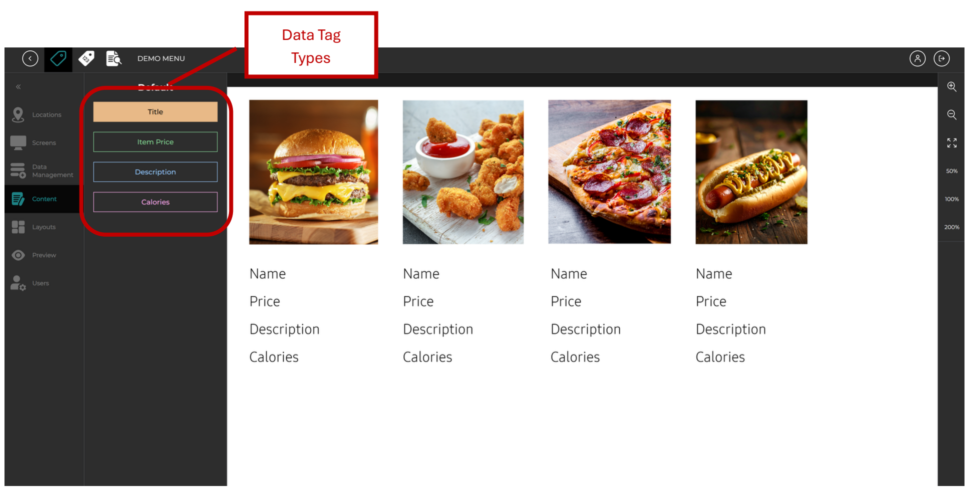
Before content can be added to a layout, the user must map Data values to fields created on top of the Canvas template exported into CM Standard.

In the Content tab of CM Standard, all available templates will be displayed with a thumbnail and name (as defined during the Export process). New content will be automatically set as Draft, meaning that it does not have any data mapping applied. Finished content that has had data mapping added and verified will be listed as Approved. Content may also be Archived, meaning not in active use, but still present in the CM Standard Organization for the user.

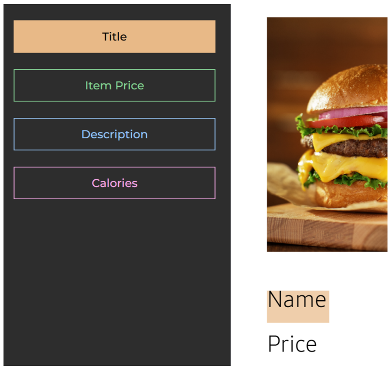
1. The user will begin by selecting the content they wish to edit under Drafts. The name will highlight in teal, and the properties will appear on the right-hand side, showing when the content was created, when it was last modified, any labels that have been applied to it, and any layouts it has been assigned to. To begin mapping data (or to change data mapping), the user will click the "Edit" button in the lower right hand corner of the Content screen.



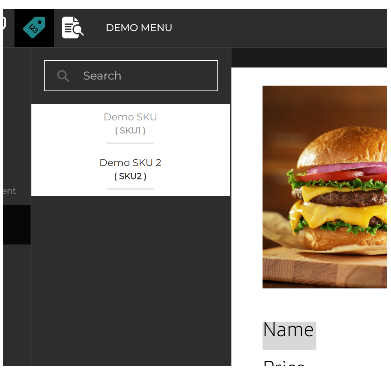
2. This will open the content item for data mapping. The user will have tag options for Title, Item Price, Description, and Calories on the left-hand side. A preview of the content template will be shown, with any text fields analyzed and set for mapping.



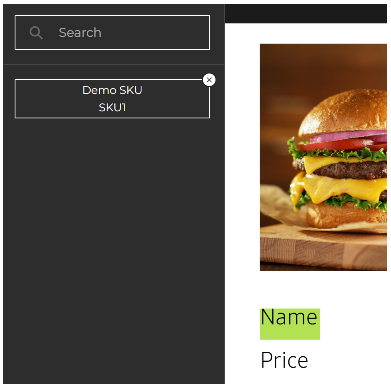
3. The user will select the text placeholder in the content preview, then select the data tag type that the text placeholder represents from the left-hand menu. Repeat for all elements of the content template that require dynamic data.



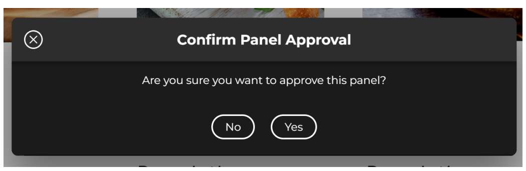
4. Once the user has mapped all the content elements to data tag types, they must associate each value with a Data item that represents the specific product. Clicking the Tag Values button in the upper left corner of the content editor will bring up a new menu, that allows the user to map values. Select the specific tagged data from the content template preview, then using the Search field, select the product to map this tagged data from.



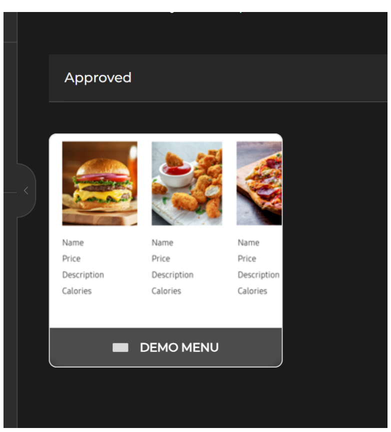
Correctly mapped fields will be shown in green, with the associated Data item displayed.



5. Once all data fields are mapped, the user will need to verify and approve the content. This is done by selecting the Data Review button in the upper left corner of the content editor. This screen will show any data errors so the user can correct them, and then the user can select “Approve” to approve the content. CM Standard will display a confirmation message, selecting “Yes” will complete the approval.

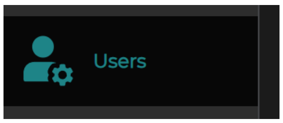


6. The content will be automatically set as Approved instead of Draft in the Content management view. It is now ready to use in a Layout to be assigned to Screens.

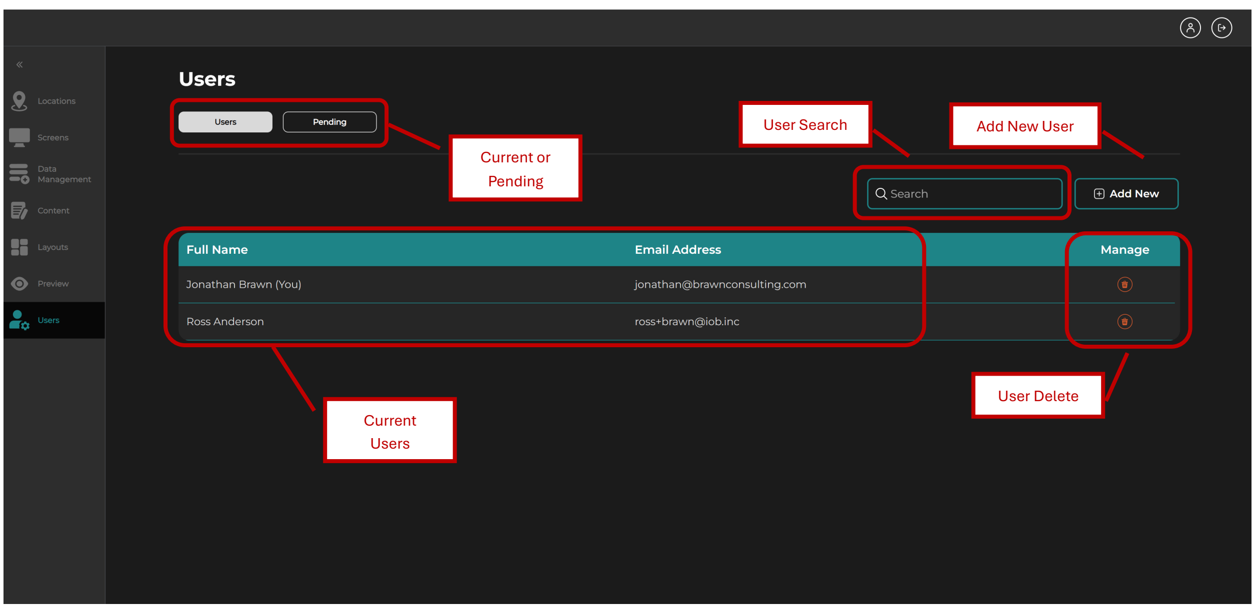


15. Creating Users and Account Management

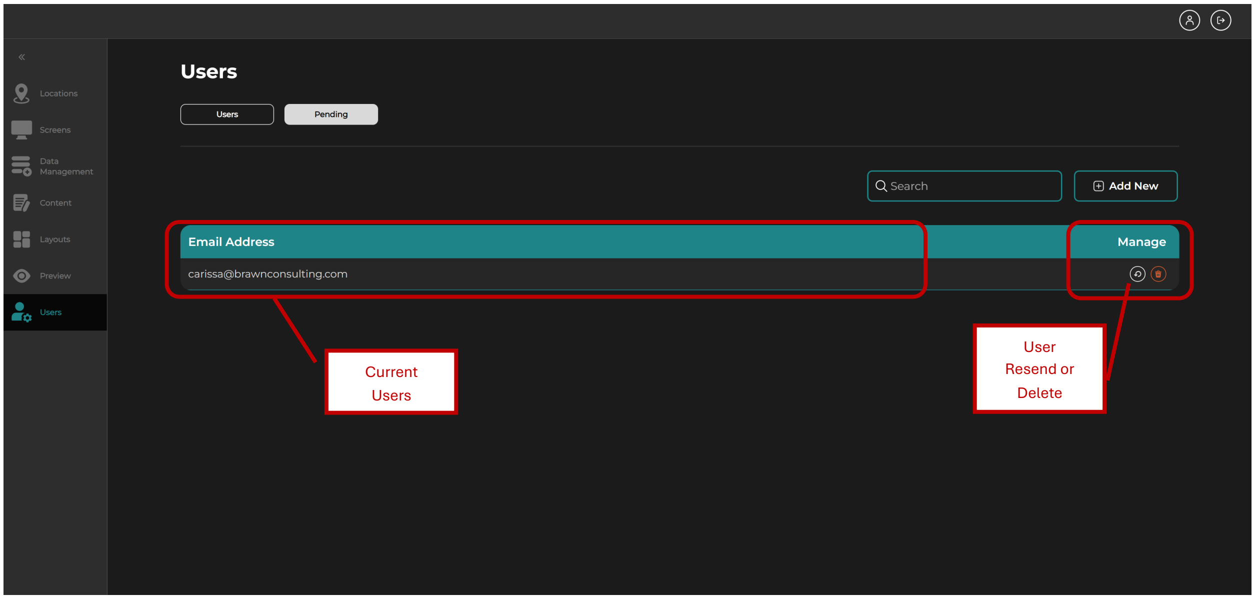
If the initial user, whose account was created during the initial registration for Utilix Standard, would like to create additional users, this can be found on the left-hand side of the CM Standard interface, under Users.



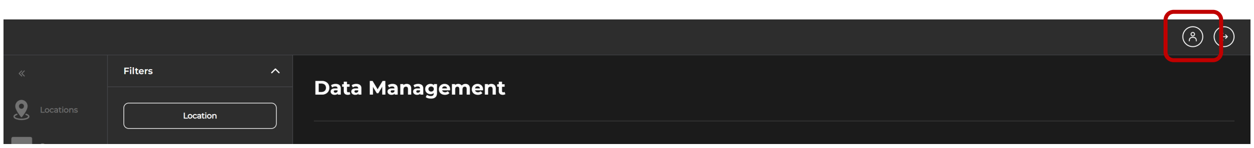
Selecting this will display the Users window, which will show current user accounts; it will display their full name, email address, and a red trash can icon to allow deleting the account. Above that to the right-hand side is a Search box to search for a specific user account by name or email, and a button labeled Add New to allow creating new user accounts. There is also a tab to allow viewing pending new users.



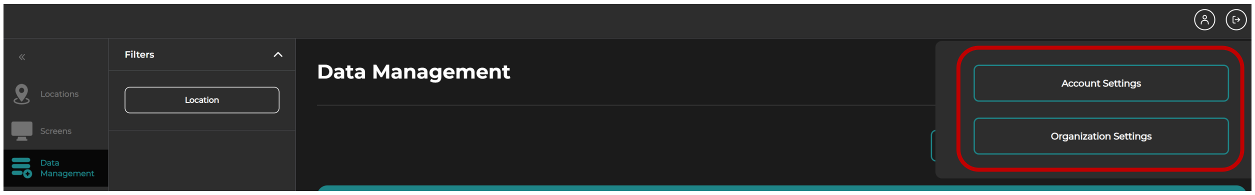
If the user wishes to create an additional user account, select the “Add New” button on the right-hand side of the Users screen. This will display a dialog to Invite User. Enter the new user’s email address and select “Send Request.” The user will receive a registration email, inviting them to join the CM Standard account. This will mirror the registration process for the new user but will automatically include them in this organization. The user will be taken to the Pending users tab, where they can see all users who have been invited, but not yet accepted. Here, the user can delete invitations or resend emails.



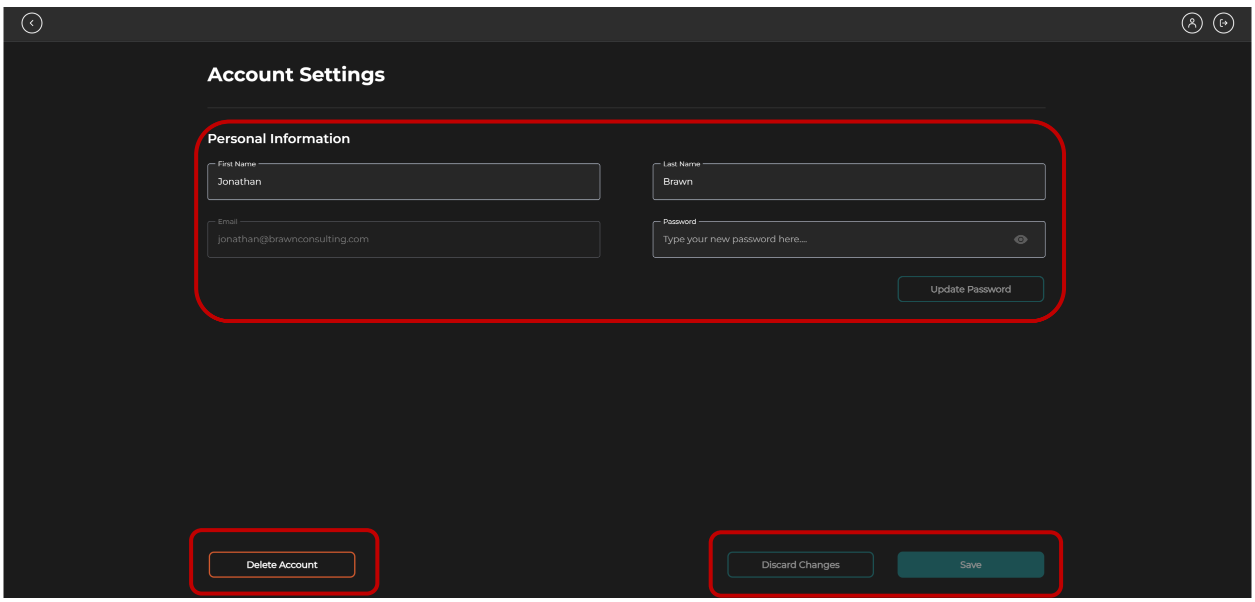
If the user wishes to reset their password, or access Organization settings for the CM Standard account, this can be accessed in the upper right of all CM Standard screens.



Once selected, a pop up will appear with Account Settings and Organization Settings.



Selecting Account Settings brings up the Account Settings page, where the user can edit their personal information such as first and last name, and update their password. They can also delete their account in the bottom left. Selecting Save in the lower right will save all changes made, or Discard Changes will cancel.



Selecting Organization Settings will display the same Organization settings available during initial creation of that Organization in CM Standard; the user can change the Organization name, set AM and PM schedules for dayparting. Selecting Save in the lower right will save all changes made, or Discard Changes will cancel.