# Optec Model IFW Intelligent Filter Wheel

TECHNICAL MANUAL FOR THEORY OF OPERATION AND OPERATING PROCEDURES



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# **MODEL IFW**

# INTELLIGENT FILTER WHEEL

TECHNICAL MANUAL FOR

THEORY OF OPERATION AND OPERATING PROCEDURES



OPTICAL AND ELECTRONIC PRODUCTS

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Figure 1-1. Model IFW Intelligent Filter Wheel

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## Section 1.0

#### INTRODUCTION

The Optec Intelligent Filter Wheel brings to astronomy a new level of sophisticated equipment for the benefit of the astro-imager. Astro-imaging in this age of astronomy requires the use of many color filters and the management of these filters during an observational session can sometimes be confusing. The use of the wrong filter could easily spoil an otherwise successful imaging run.

The Optec IFW has the ability to determine the identification (ID) of a particular wheel and apply that wheel ID to a preprogrammed set of filters. The names, not just position numbers of these filters, are displayed on the eight character display and are also available to the camera operating software via an RS-232 interface using a simple command structure. Up to 5 different filter wheels can have separate IDs and each wheel can have up to 5 filters for a total of 25 identifiable filters.

The IFW filter wheel can easily be removed from the IFW system without tools or removal from the telescope. A hinged door is secured by a single captive thumbscrew. Once opened, the wheel can be extracted and another inserted in its place. The entire process takes only a few seconds. Hitting the HOME switch on the hand control or invoking the HOME function in the operating program will set the wheel to position one and bring up the available filters for that wheel.

The IFW can be controlled by either the switches on the hand control, an SBIG camera controller, or by an external computer via an RS-232 interface. The RS-232 operating protocol is a set of simple ASCII commands that any programmer can easily implement. While any software capable of controlling the SBIG CFW-8 filter wheel can immediately control the IFW, we believe developers will incorporate the IFW serial operating protocol since it offers full feedback including filter names. Optec's IFW control software can be used for the filter description programming and also for filter selection and control.

## SECTION 2.0

#### **INSTALLATION**

Attach a telescope adapter to the telescope securely without the IFW connected. Using the included hex ball-driver, loosen the three #8 setscrews around the 2.4" diameter hole on the front side of the IFW so that it can slip easily onto the telescope adapter. After rotating the IFW to the desired orientation, tighten the three setscrews evenly making sure no gap is visible between the IFW and the telescope adapter.



Figure 2-1. IFW Intelligent Filter Wheel System Components.

A control cable with 8-pin modular connector on one end and a 9-pin sub-D connector on the other is used to connect the IFW to the hand control box. Lengths of cable 6, 12, 25 and 50 feet as well as custom lengths are available from Optec. This is the same cable used with the TCF focuser and can be interchanged. IMPORTANT NOTE: Accidentally switching controllers from the TCF and the IFW will NOT cause damage to either unit.

The power supply for the IFW is regulated at 12 VDC and 1.25 amp. Use only this type to power the IFW controller.

## Section 3.0

#### THEORY OF OPERATION

#### 3.1 WHEEL & HOUSING

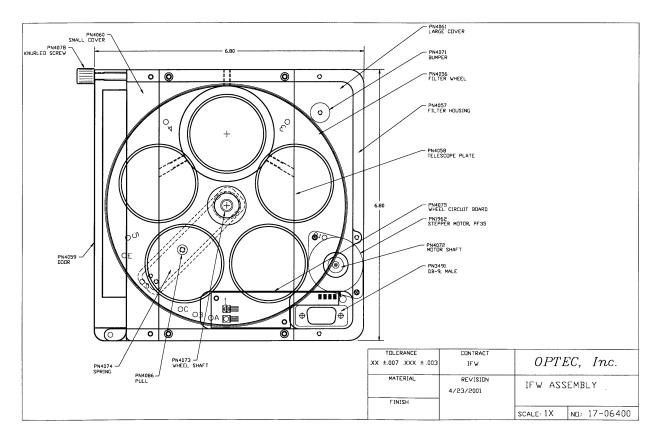


Figure 3-1. IFW Cross-Section View with Part Descriptions.

The IFW wheel is 6 inches in diameter and is rotated on the center axis by a small stepper motor. The wheel can hold up to five 50mm filters, which are mounted in place using an RTV silicone sealant. The shaft of the stepper motor makes friction contact with a Buna-N O-ring that is secured to the circumference of the wheel. It takes approximately 2000 steps of the stepper motor to complete one rotation of the wheel. At 125 steps per second, it takes approximately 16 seconds for one complete wheel rotation. One filter position change takes approximately 3.2 seconds.

Small magnets are inserted into each wheel opposite the filters, which indicate to the electronics the current wheel ID and filter position. Hall effect sensors detect the magnets and send a logic control signal to the hand control micro controller. The numbers 1, 2, 3, 4, and 5 mark the filter position magnets on the wheel and correspond to the filter on the opposite side. (See *Figure 3-2*.)

Another set of 5 holes, only one of which contains a magnet, are used to identify the wheel and filter position number one. These holes are marked with the letters A, B, C, D, and E, which correspond to the wheel ID. As the wheel rotates during the HOME procedure, the lettered ID hole with the magnet will pass over a second Hall effect sensor initiating a control pulse. The number of steps from this control pulse to the next signal pulse by the position magnet (filter position number 1) determines the wheel ID. The wheel will stop at filter 1 and wait for further commands.



Figure 3-2. 5-Position Filter Wheel with RGB-IR and Luminance filters.

The wheel is held in place by a center shaft which is spring loaded and can be pulled from the wheel by use of a small pull knob on the back of the wheel housing. Rotating the pull knob counter clockwise will allow the spring shaft to retract from the wheel. At that point, the door can be opened and the wheel removed by hand. (See *Figure 3-4*.) A different wheel is inserted and the pull knob turned clockwise until the shaft falls into the wheel center bearing. Proper operation of the wheel is dependent on the friction for the O-ring and motor shaft. If the pressure is too light or too heavy, or if there is oil or grease on the O-ring, the wheel will not rotate properly and an error condition will occur. Usually, cleaning the O-ring will solve this problem. See Section 6.0 for troubleshooting information.

A lightweight, 6061 aluminum alloy is used for all machined parts. All parts are machined from solid aluminum blocks for optimum strength. In addition, all aluminum parts are bright dip and black anodized for maximum corrosion protection. See *Figure 3-1* for views and part descriptions of the IFW assembly.

#### 3.2 IFW CONTROLLER

The heart of the controller is the PIC programmable CMOS micro controller made by Microchip. This device has 22 I/O pins, 4K of program memory, 192 bytes of RAM and operates at 8 MHz. Using CMOS technology, this device uses very little power and can operate within the industrial temperature range specification of -25°C to +80°C. All programming was done in basic and compiled using PIC Basic Pro by *microEngineering Labs* of Colorado Springs. See *Figure 3-3* for a function diagram view of the IFW controller.

The input power source is from a switching DC power unit rated at 12 VDC regulated and 1.25 amp maximum output current. Normally, the IFW uses only 200 ma when operating. A three terminal regulator produces +5 VDC for use by the PIC micro controller, EEPROM, DRO display and stepper motor controller chips. Using a variety of protection devices, the input power port is well protected from voltage surges, reverse voltage, low voltage (brownout) and other circuit busting conditions. A replaceable 5x20 mm fuse rated at 0.5 amps is used for final input protection. This fuse will blow if the input voltage is reversed which could only happen if the user incorporates a custom power source such as an automotive battery.

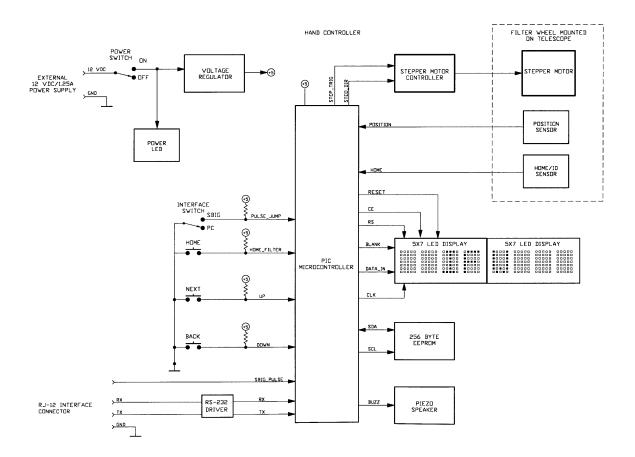


Figure 3-3. IFW Function Diagram.

The DRO uses a premium Hewlett Packard CMOS 5x7 matrix LED display showing four characters with a height of 0.15 inch. Two of these are used in series to give an eight-character display. The selection of this device over a lower cost LCD unit is primarily based on performance. This unit can operate down to  $-40^{\circ}$ C and the LED dot matrix display is far more visible in low light conditions compared to an LCD device. In addition, the face of the display is protected by a piece of 1/16 inch thick red acrylic lens which also enhances contrast.

An integrated BiMOS unipolar driver chip is used to operate the stepper motor. This device is rated to operate within the industrial temperature range of -25°C to +85°C and can output a maximum current of 1.5 amps far exceeding the needs of the motor. This integrated circuit is fully protected against inductive transients. In addition, thermal protection circuitry will disable the outputs when the chip temperature is excessive. This could happen if the output cable is shorted because of damage or wear.



Figure 3-4. IFW with Door Open for Wheel Change (shown with TCF focuser)

# Section 4.0

#### **OPERATING PROCEDURES**

Refer to *Figure 4-1* for a view of the hand controller front panel. Tables 4-1 through 4-3 below explain the three most typical procedures of the IFW. Switch settings, functions, and errors are described.

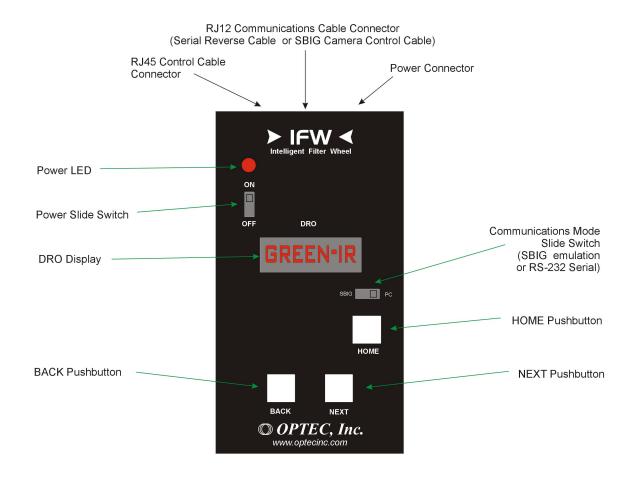


Figure 4-1. IFW Hand Control Layout.

#### MANUAL MODE

#### **SWITCH SETTINGS:**

Power switch is put in the ON position. Mode switch is in either position, SBIG or PC.

#### **FUNCTION:**

At power on, the IFW will rotate to the HOME position, which is position 1, and stop. The DRO will display the letters IFW during the time it is finding position one and the wheel ID. When position 1 is found the filter name will be displayed. Filters can be selected by using the NEXT or BACK pushbuttons. Press one of these buttons repeatedly to find the desired filter and then stop. After one second of no input, the wheel will begin to move to the selected filter. At the start and end of the movement an audible beep will occur and the display will flash. No further input will be accepted until the wheel is in the selected position.

#### **ERRORS**:

If the wheel takes too many steps to find the HOME position or the filter ID is not read correctly an error message will be displayed for a short time.

An ERROR= 1 would display if the wheel rotation to find the HOME position takes an excessive number of steps

An ERROR= 4 would display if the wheel is stuck in a position

An ERROR= 6 would display if moving to another position uses an excessive number of steps.

See the trouble shooting section for guidance.

Table 4-1. Start-Up (Manual Mode).

#### SBIG (SANTA BARBARA INSTRUMENT GROUP) MODE

#### **SWITCH-SETTINGS:**

Mode switch is in the SBIG position Power switch is in the ON position

#### **FUNCTION:**

In this mode, the unit can be operated by the SBIG controller that uses pulse width as a filter indicator. Use the pull down menu in CCDOPS or other software that is compatible with the SBIG camera controller and select the filter. Only the first 5 filter positions are usable.

#### **ERRORS**:

An ERROR= 5 message would appear if the pulse width from the SBIG controller is not within specifications.

Table 4-2. SBIG Operating Mode.

#### PC (RS-232) MODE

#### **SWITCH SETTINGS:**

Mode switch is in PC position Power switch is in the ON position

#### **FUNCTION:**

In this mode, the IFW can be operated manually until a WSMODE command is received. At that point, no hand controller input will be accepted until a WEXITS command is received from the PC to relinquish control or the unit is switched off. The PC has complete control of the IFW for selecting filters. When a filter is selected the new filter is displayed on the 8 character DRO and the audible beep is also heard at the start and stop. When a new wheel is inserted, the HOME function must be invoked by the PC to identify the wheel and load the filter names. See Section 5 for details of PC control.

#### **ERRORS**:

All error codes are transmitted on the RS-232 interface and displayed on the 8 character DRO.

Table 4-3. PC Operating Mode.

## Section 5.0

#### REMOTE CONTROL

The IFW uses a communication protocol that is very similar to our TCF focuser.

#### 5.1 SBIG CONTROL

The SBIG control for the filter wheels has been around for some time. The Optec MAXFilter uses this protocol for selecting one of three filters. The selection of the filter is dependent on the width of a pulse that comes from the SBIG camera controller or a PC parallel port such as the case with Maxim DL software. The following range of pulse widths are used in the Optec IFW program to select position:

Position	Pulse Width µs
1	430 – 665
2	670 - 970
3	975 – 1230
4	1235 – 1515
5	1520 – 1850

Table 5-1. SBIG Position Pulse Width.

The pulse resolution of the PIC micro controller is 5 microseconds.

The incoming signal uses pins 3 (signal) and 4 (common) of the 6-pin RJ-12 jack on the hand control. These cables are listed on the Optec price sheet as SBIG Camera Control Cables and replace the SBIG Tracking Interface Cable. Optec can supply cables of almost any length to accommodate this interface protocol.

#### 5.2 PC (RS-232) SERIAL COMMUNICATIONS

The IFW provides a serial communications feature as standard for this model. The hand controller of the IFW includes built-in circuitry with a limited RS-232 interface allowing the user to communicate with the wheel from any external PC. Using simple ASCII commands, the IFW can be commanded to select any filter, identify the wheel ID, read the filter name array or upload

a new set of filter names to be stored into the onboard EEPROM. The RS-232 interface operates at 19.2 K baud with 8 data bits, one stop bit and no parity.

#### 5.2.1 CONNECTING THE IFW TO THE PC

For the physical wiring connection between the PC and the IFW, Optec recommends our PC serial port converter (stk. #17695) and an RJ-12 reverse cable. Optec offers a number of these cables in lengths from 6-ft to 50-ft. Custom cables can also be ordered. The reverse cable is wired pin 1 to pin 1, pin 2 to pin 2, etc. A six-wire flat cable with RJ-12 connectors on each end works well up to at least 120 ft. (Refer to Appendix A for wiring details.)

The RS-232 implementation used with the IFW is a simple 3-line interface using RX, TX, and GND. (Refer to Appendix A for wiring details.) At Optec, we use a DOS shareware telecommunications program called PROCOMM for IFW control and testing during software development. Configured versions of PROCOMM are available for free download from our FTP site (ftp://ftp.optecinc.com/zip/).

#### 5.2.2 COMMUNICATIONS PROTOCOL

The remote PC communication program should be set for 19.2 K baud rate with 8 data bits, 1 stop bit, and no parity (8N1). The IFW is preset for these values and will not respond to other settings and cannot be changed. **Be sure to set the baud rate to 19.2K BAUD before attempting communication with the IFW.** Tables 5-1 through 5-11 below describe in detail the commands used to control and communicate with the IFW. To establish communications a WSMODE command must be sent along the serial line to the IFW. This command should consist of the ASCII serial string "WSMODE" (without the quotes). If a partial command string is received, the IFW micro controller will timeout after only a few milliseconds and may not parse the entire command string properly. The controller program may timeout between characters when sent one at a time. PROCOMM can be used successfully in the chat or host mode where the string command is not sent until a CR/LF is typed. Once the WSMODE command has been received and accepted by the IFW, a return character of "!" (followed by a CR/LF) will be sent back to the PC communications program. None of the other commands will work before the WSMODE command has properly initialized the serial connection.

#### 5.2.3 IFW SERIAL COMMANDS

Command	Return
WSMODE	" <u>I</u> "

#### Function:

This command initializes the serial connection between the PC and the IFW. WSMODE causes the IFW program to enter into the main serial loop which checks for additional inputs along the RJ-12 connector. A successful return from this command (!) is required before the IFW will accept any other user commands.

#### Warning:

If "!" not returned repeat WSMODE. There is a possibility that the command will timeout. This is also true if the wheel is being operated manually when the WSMODE is sent.

Table 5-2. Enter IFW serial control.

Command	Return
WHOME	" <b>y</b> " y = A, B, C, D or E

#### Function:

Make wheel find position 1 and identify filter wheel . Load from EEPROM set of filter names that relate to filter wheel.

#### Warning:

It may take up to 20 seconds for HOME function to complete.

ER= 1 is returned if number of steps to find position 1 is excessive.

ER= 3 is returned if filter ID is not found successfully.

Table 5-3. Home Wheel Command.

Command	Return
WIDENT	" <b>y</b> " y = A, B, C, D or E
Function:  This returns the identity of the filter wheel to the PC.	

Table 5-4. Identify Wheel Command.

Command	Return
WFILTR	"
Function:	
This returns the current filter position.	

Table 5-5. Identify Current Filter Command.

Command	Return
<b>WGOTO</b> <i>x x</i> = 1, 2, 3, 4 or 5	" <b>*</b> "

#### Function:

Wheel will go to selected filter position "x". No further command should be sent until the "\*" character is returned.

#### Warning:

ER=4 is returned if the wheel is stuck in a position

ER=5 is returned if a number not in the set (1, 2, 3, 4 or 5) is sent

ER=6 if the wheel is slipping and takes too many steps to the next position

Figure 5-6. Goto a Selected Filter Command.

Command	Return
WREAD	" <b>n</b> <sub>140</sub> "

#### Function:

This command returns a string of 40 characters that are the stored names for the filters in the current wheel. The first 8 characters relate to the filter name for position 1 and the last 8 characters relate to the filter in position 5.

Figure 5-7. Read Current Wheel Filter Names Command.

Command	Return
WLOADy* $n_{140}$ y = wheel ID (A, B, C, D or E) $n_{1}n_{40} = \text{filter names from position 1 to position 5}$	" <b>!</b> "

#### Function:

This command allows the user to program the on board EEPROM with the filter names for a selected filter wheel. After sending the string, you must wait a minimum of 10 ms before entering another command to allow time for the micro controller to program the on board EEPROM. If data is received and stored successfully, a "DATA OK " will be displayed on the DRO and a "!" character will be returned on the serial interface. Only a limited number of characters are allowed and these are:

#### 0123456789ABCDEFGHIJKLMNOPQRSTUVWXYZ=.#/

A space is also allowed.

manual operation.

#### Warning:

The EEPROM will store any ASCII character but only a limited number of characters can be displayed.

An ER=3 is returned if an improper value for the wheel ID is received. Character pacing of 25 ms minimum is also required for sending the data string.

Figure 5-8. Load Filter Names Command.

Command	Return
WEXITS	"END"
Function:  This command causes the program to exit the serial loop and return to normal	

Figure 5-9. Exit Serial Mode Command.

# Section 6.0

#### TROUBLE SHOOTING

- 1. The number one problem that could occur with the IFW is a slipping or stalled wheel. Keeping the wheel O-ring clean will probably solve most problems of this nature. Use rubbing alcohol and a Q-tip or clean cloth to wipe the O-ring clean. The right cover could also be removed to expose the motor drive shaft. Use the same alcohol and Q-tip method to clean the friction area of the drive shaft.
- 2. ERROR = 1 indicates that the total number of steps to find the HOME filter position has exceeded 2600. The total number of steps should be less than 2000 unless the wheel is slipping. Clean the O-ring and drive shaft as described in paragraph 1. If this does not solve the problem, loosen the screws holding the motor and, while holding the motor against the filter wheel O-ring a little harder, retighten the screws.
- 3. ERROR = 2 indicates that the SBIG pulse does not have the proper width for the IFW. This error condition will occur if filter positions 6, 7 or 8 are selected from the camera control software. Only positions 1 through 5 are acceptable.
- 4. ERROR = 3 indicates that a non-valid ID was obtained. Since the ID is first found during the HOME function by counting the number of steps from the home/ID magnet to the position magnet, a slipping or stuck wheel would give an erroneous step count. Clean the O-ring as described in paragraph 1. Less likely to occur, if the controlling software sends a non-valid wheel ID in the WLOADy command, this error condition will occur. Only A, B, C, D and E are valid wheel IDs.
- 5. ERROR = 4 indicates that the wheel is stuck in a position or moving much too slowly to move out from under a magnet during a position change. Clean the O-ring as described in paragraph 1. Leaving a wheel in the housing unused for a long time could create a flat spot on the O-ring which may cause this error condition. Remove the wheel and work the flat spot with your fingers until it has come out. Clean the O-ring before replacing the wheel.
- 6. ERROR = 5 is a rare condition since it means that the controlling camera software has sent a non-valid position to the IFW. Only whole integer numbers 1, 2, 3, 4 and 5 are acceptable.
- 7. ERROR = 6 indicates that a position change has taken over 800 steps which is far too many. Clean the O-ring as described in paragraph 1.
- 8. Clean filters with rubbing alcohol or lens cleaning tissue. Avoid using xylene or acetone unless you are confident in your methods. These solvents will soften the silicone sealant used to hold the filters in and may also attack the adhesive compounds used to hold multiple glass filters together. Another good idea is to blow off the filters with a compressed gas such as

- "Dust-Off" before proceeding with any cleaning operation that requires rubbing. At Optec, we prefer to use 70% Ethanol rubbing alcohol and Q-tips for cleaning optics.
- 9. Computer interface problems are too numerous to mention here. Call Optec or the camera control software company for advice. However, connector or cable problems usually are the number one reason for a failed interface. Double check all pins and connections for continuity and make sure the cables are all the way into the mating connector.

### Section 7.0

#### **SPECIFICATIONS**

#### **FILTER WHEEL**

Maximum number of positions 5 Filter Diameter 50mm Maximum Filter Thickness 5.5mm Wheel Diameter 6.00 inches 0.30 inches Wheel Thickness

Position/ID magnets Alnico 8, 0.125D x 0.25L

Weight (without filters) 6 oz.

Material 6061 T6 aluminum alloy

#### **HOUSING & WHEEL**

Size 6.65 x 6.80 x 1.00

Weight 35 oz.

Stepper Motor PF-35 Nippon, 48 steps/rev

Position/ID sensors Hall effect 2000 approx. Steps for wheel rotation Steps for each position change 400 approx.

Time for each position change 3.2 seconds approx.

#### **CONTROLLER**

Type I/O ports PIC micro controller, 16C63A series

8 MHz Clock frequency **4K EPROM CPU Memory** 192 bytes RAM **EEPROM** 256 bytes

IFW connector 8-pin modular jack, RJ45 type PC connector 6-pin modular jack, RJ12 type

Power connector 2.5 mm power jack Power 12 VDC ± 1, 200ma

Size 5.6 x 3.2 x 1.5 inches (L x W x H)

Weight 6 oz.

#### **POWER SUPPLY**

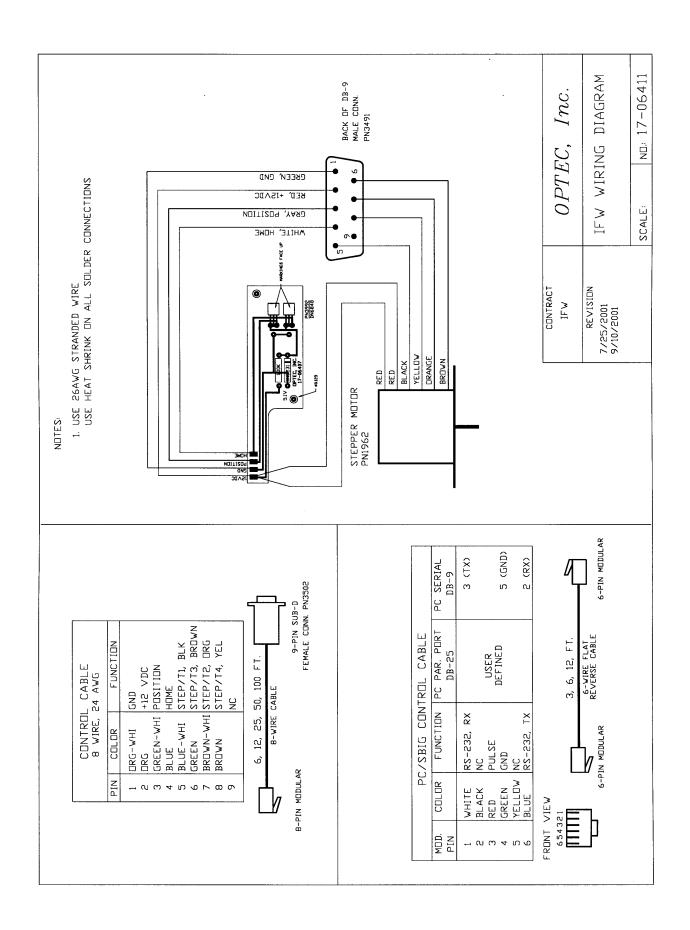
Input 100 - 240 VAC, 50/60 Hz, 0.4 A Output 12 VDC, 1.25 A regulated

Input connector IEC 320/7 UL, CSA, CE Listed by Output Connector 2.5 mm power plug

Center Pin positive

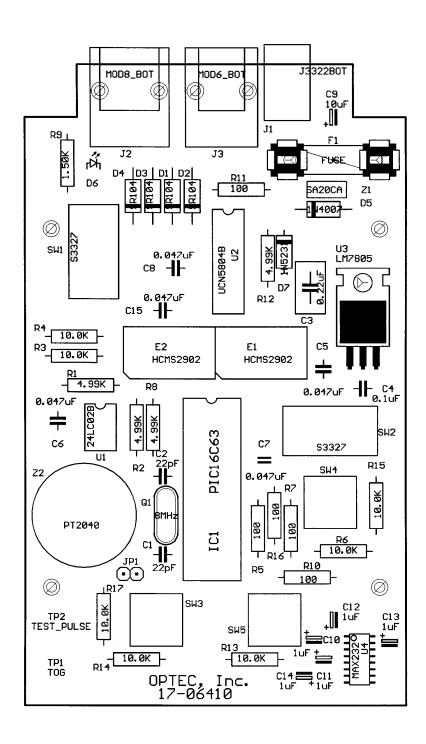
# **Appendix A**

# WIRING DIAGRAM

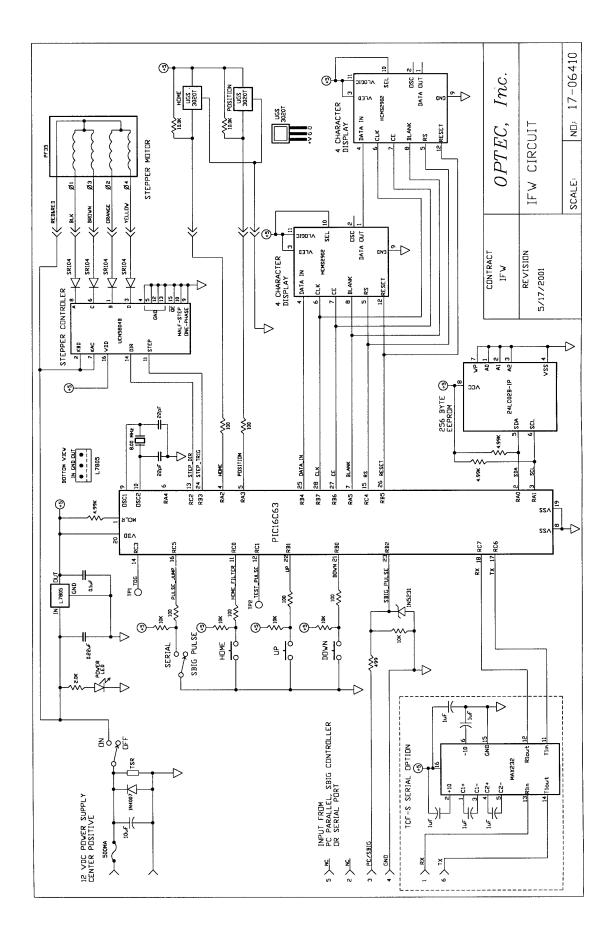


# Appendix B

### **CONTROLLER BOARD LAYOUT**



# Appendix C CONTROLLER BOARD CIRCUIT

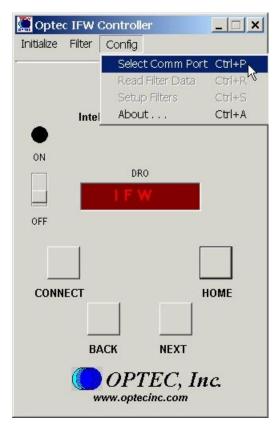


# **Appendix D**

#### IFW CONTROLLER SOFTWARE

The IFW Controller software program offers the user easy filter selection from the computer using the IFW in the PC or RS-232 serial mode. Additionally, the user can also rename any or all of the filters for a 5-position filter wheel and set the filter names into the IFW's built-in EEPROM memory. After renaming, the IFW will recall the new filter names whenever the IFW is turned on or whenever the filter wheel is reinserted into the IFW.

To install the IFW Controller program on your WIN95/98, WIN NT, or Windows 2000 operating system run the setup program. The latest version of the IFW Controller software package is available for free download from <a href="ftp://ftp.optecinc.com/zip/ifw\_ctrl.zip">ftp://ftp.optecinc.com/zip/ifw\_ctrl.zip</a>. After installation double-click the IFW Controller icon in the Optec program group under the start menu. The default serial port for the IFW Controller is COM1 which should be set to 19200 baud, 8/N/1 protocol. Be sure the SBIG/PC slide switch on the IFW hand control is set to PC mode. After the program loads you may change the serial port before connecting to the hand control. Under the Config menu, click on "Select Comm Port" or simply press control-P on the keyboard.

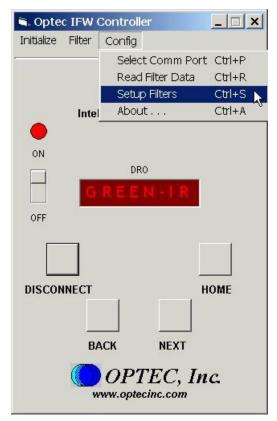


The program will prompt the user for a valid communications port. Once set, start a connection with the hand control by pressing the CONNECT button, turning the ON/OFF switch on, selecting Connect from the Initialize menu, or pressing control-C on the keyboard. The filter wheel will need to perform a "Home" and the following popup box will appear.

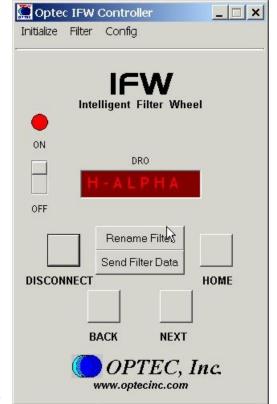


Be sure to perform a Read after the Home has completed by pressing control-R or selecting "Read" from the Config pull-down menu.

Select any of the five filters from the Filter pull-down menu or using the F1 through F5 keys while the IFW Controller window is active.



To rename any of the filters in a particular wheel or to define filters for a new wheel, first insert that wheel into the IFW. After Connecting and performing a Read operation, select the Setup Filters option under the Config menu or press control-S on the keyboard. Two buttons will appear under the DRO readout – one to "Rename Filter" and another to "Send Filter Data."



Press the Rename Filter button for a prompt of the filter number (1 through 5) and the filter name. The program will truncate and format the user's entry as necessary.

After naming one or more of the filters, press the Send

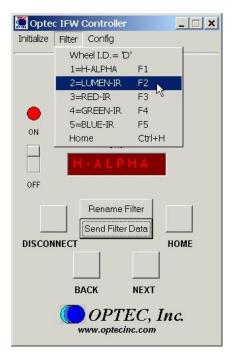


HOME operation to push the new names to EEPROM memory.

Use the IFW Controller software for simple filter selection using either the Filter pull-down menu or the function keys F1 through F5

Filter Data button and watch the display on the IFW hand control. If the send is accepted by the IFW a "DATA OK" message will appear on the 8-digit display for about 2-3 seconds. The following prompt will appear on the computer. After the DATA OK message disappears the IFW will need to perform another



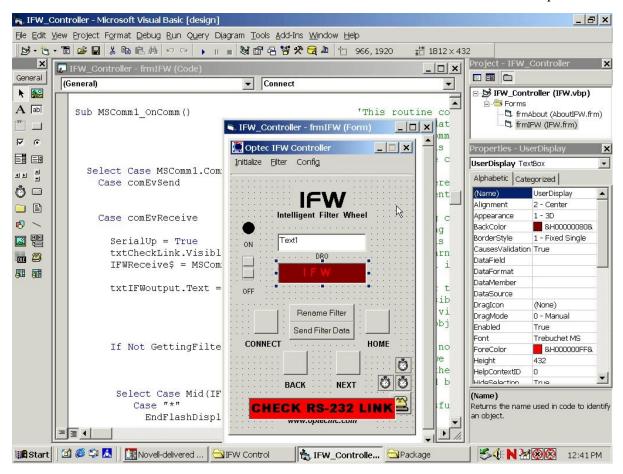


(corresponding to filter positions 1 through 5, respectively) at any time.

IFW Controller is written in VisualBasic 6.0 Professional Edition. The VB source code is included with the IFW Controller software for users interested in developing their own code. Feel free to experiment with and modify the code as necessary. The MSCOMM32.OCX control is required to run the program and also to open the source code for edit. MSCOMM32 is included with VB 6.0 Professional Edition only.

Users may wish to install the special fonts in the Fonts folder to ensure the DRO display appears properly. The Source folder includes the source files necessary for Visual Basic editing. Double-click the IFW.vbp file. The text of the

source code for the build is included in PDF format as well. Adobe's PDF reader is required.



Contact Optec's Technical Support (<u>techsupport@optecinc.com</u>) with any comments, questions, or concerns.