Oracle® Hospitality Suite8
Introduction User Manual
Release 8.9

July 2015

ORACLE®

Contents

Preface

Audience

This user manual is intended for system users and system administrators.

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

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at
http://docs.oracle.com

Revision History

Date	Description of Change
July, 2005	• 8.5.0.0 - First Issue Small Business Edition
May, 2008	• 8.7 - Updated for Version 8.7
June, 2008	• 8.7.3.1 - Updated for Version 8.7.3.1
May, 2009	• 8.8 - Updates for Version 8.8
Sept, 2010	• 8.8 - Updates for Oracle 11gR1
Jan, 2012	• 8.9 - Updated for Version 8.9
Nov, 2012	• 8.9 - New cover page
July, 2015	• 8.9 – Oracle template applied

1   Introduction

Logging In

To use Suite8 you must first log into the system. You must have a valid user identification and password.

Logging into Suite8

1. From the desktop, click the Fidelio Suite8 icon.

    The Suite8 Splash screen is displayed for several seconds with the Payment Application Data Security Standard (PA-DSS) disclaimer

    The Fidelio V8 Login screen is then displayed.

2. Type your user identification (case sensitive) in the Login name box.

3. **Tab** to the Password box.

4. Type your secret password (case sensitive) in the Password box.

5. Click LOGIN, the Suite8 main menu screen appears.

   You are now logged into the system.

   > **Note:** If one of the following tables: WMLG, WLOG, ZPOS, WDAT, SHIS, SRPD, WRPD has no indices or a missing index, an alert is displayed when starting Suite8 with a message to contact support. It could happen that a table has no indices in the event that a table was renamed for support purpose. Renaming a table carries the indices to the renamed table. If an index is missing of one of the above mentioned tables, the alert is displayed when starting Suite8.

Navigation Keys

Accelerator keys
Accelerator keys are used for fast access to a box on a screen or dialog box. When a letter is underlined you can press the **Alt + letter** keys and the cursor moves into the appropriate box. For example, on the Profile Search screen the letter "A" is underlined in the Name box. By pressing the **Alt + A** keys, the cursor moves into the Name box.

To use the accelerator keys:
From the screen or dialog box, press **Alt + letter** to move the cursor into the appropriate box.

Shortcut keys
Suite8 has shortcut keys that allow you to perform actions directly from the keyboard without having to use the mouse. Using these keys saves you time.

Suite8 Shortcut keys
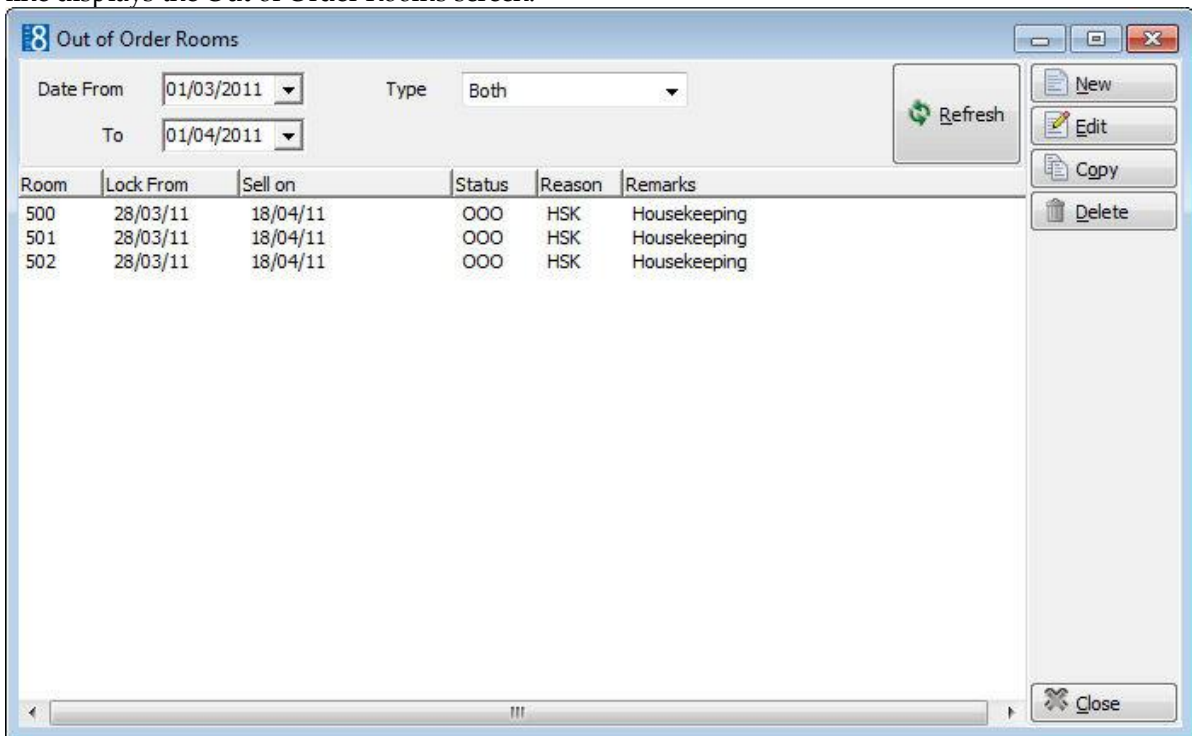
Shortcut Key	Description
F1	Displays the help.
Alt + F4	Closes the active window.
F10	Closes all active windows.
F12	Moves the cursor from a data box to the first record on the grid.
Alt + Down arrow	Displays a combo box.
Tab	Moves forward through the boxes/options. Moves to the next box and confirms the entry.
Shift + Tab	Moves backward through the boxes/options.
Ctrl + Tab	Moves forward through tabs.
Ctrl + Shift + Tab	Moves backward through tabs.
Escape	Cancels the current action. Removes a Combo box before a selection has been made.
Home	Moves the cursor to the beginning of a box.
End	Moves the cursor to the end of a box.

Using the blue drill down arrow

Many boxes have a blue drill down arrow ⬇ next them indicating that there is additional information that can be displayed.

Housekeeping			
	Total	Occupied	Vacant
Clean Rooms	57	1	56
Dirty Rooms	80	17	63
Total		18	119
Out of Order	0	0	0 ⬇
Out of Service	0	0	0 ⬇
Rooms in Queue			0 ⬇

For example, on the House Status screen clicking the blue drill down arrow on the Out of Order line displays the Out of Order Rooms screen.

HTML View

Suite8 offers the possibility to view information in HTML format. HTML is the abbreviation for "Hypertext Markup Language." This is the system of marking a document so it can be published on the World Wide Web and viewed with a browser. The main areas where information can be viewed in HTML format are as follows:

- Reservation Navigator
- Blocks
- Profiles
- Cashiering
- Tasks and Activities
- Events

- Conference Reservation

The HTML display on the reservation navigator can be hidden so that the reservation grid is expanded. Double-click in the blue reservation header bar or right-click and select/deselect LOWER PART OF THE SCREEN from the short-cut menu to view or hide the HTML display. This setting is stored per user and remains until the next time it is changed.
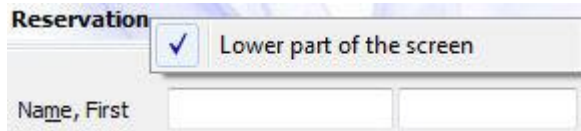
Expand the HTML tree

- Click the expand icon to show all available folders.
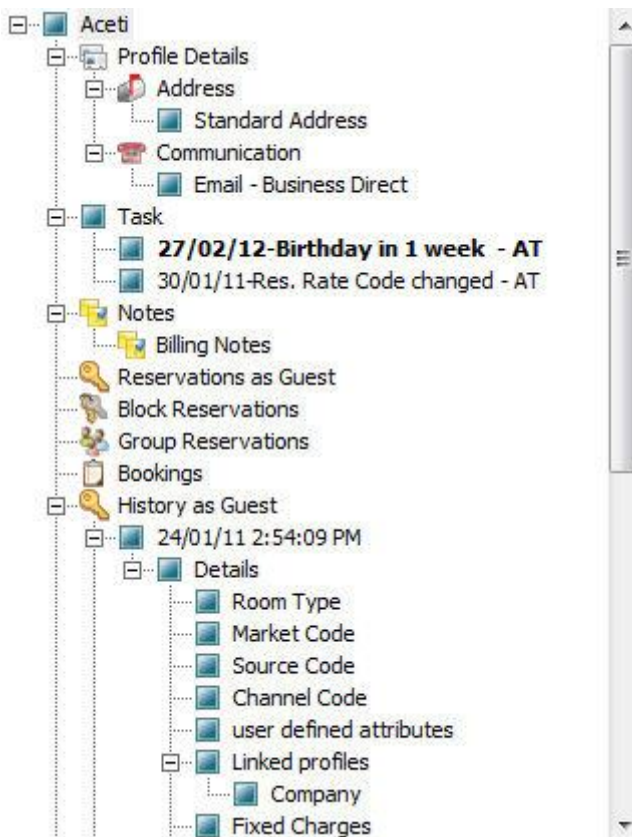
Collapse the HTML tree

- Click the collapse icon to collapse all folders to the uppermost level.
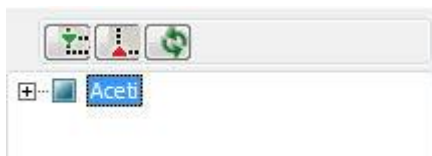
Refresh the HTML View

- Click the refresh icon

View information in HTML format

In this example we will display information in HTML format on the profile screen.

1. Click the CUSTOMER RELATION menu and select PROFILES to display the customer profile screen.

This main customer profile screen is called the Navigator and is divided into 3 distinct areas:

- Query - basic and advance profile search criteria

- Query Results - the results of the query shown in a grid format

- Tree Listing and HTML Page

    - A tree listing of all the details associated with this profile including address, communications, links, reservations or history

    - A freely definable HTML display which by default has a 'big' format where the details are displayed in a non-grid style format or a list format. The HTML display can be printed by using the right mouse click.

2. Enter the name to search for in the NAME box and click SEARCH.
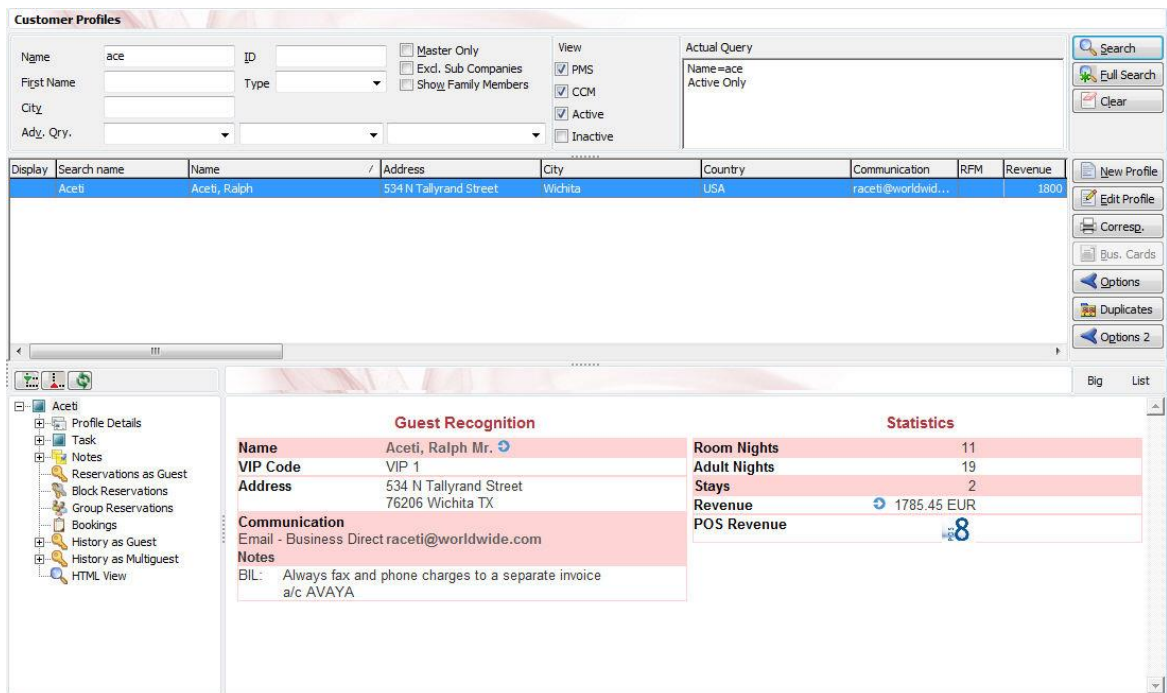
4. The query results are shown in grid format in the middle section of the screen and the tree and HTML formats are shown in the lower section of the screen.
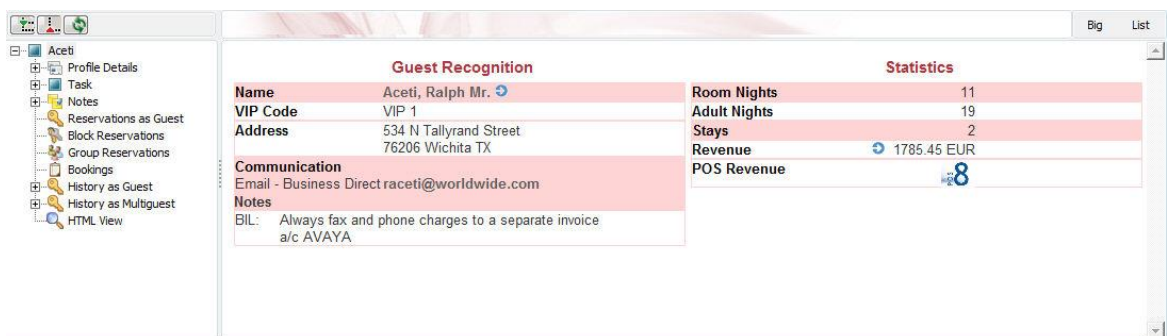
5. In this instance the HTML view displays a summary of the profile details. The tree listing is displayed by default expanded by one level. A plus sign next to a folder indicates that it can be expanded to show more folders; a minus sign indicates that it can be collapsed.

Change the display of the HTML

Two additional buttons on the html display allow you to change whether certain details are displayed in a non-grid style or in a list format. By default the 'big' view is displayed.

1. To view in list format click the **List** button.

Arrival	Departure	Nights	Customer	Arrival day	Departure day	No of Rooms	Room type	Room	Market	Rate Code
20/04/11	22/04/11	2	Aceti Ralph	20/04/11	22/04/11	1	Double Room		Individual	
30/03/11	31/03/11	1	Aceti Ralph	30/03/11	31/03/11	1	Double Room	109 Double Room	Individual	

2. To view in a non-grid style, click the **Big** button.

20/04/11	**30/03/11**
Departure:22/04/11	Departure:31/03/11
Nights:2	Nights:1
Customer: Aceti Ralph	Customer: Aceti Ralph
Arrival day: 20/04/11	Arrival day: 30/03/11
Departure day: 22/04/11	Departure day: 31/03/11
No of Rooms: 1	No of Rooms: 1
Room type: Double Room	Room type: Double Room
Room:	Room: 109 Double Room
Market: Individual	Market: Individual
Rate Code:	Rate Code:

Copy to clipboard

It is possible to copy information from the HTML files to clipboard by selecting items from HTML, using right mouse short cut menu and selecting COPY TO CLIPBOARD or short cut key CTRL + C. This information can then be pasted to any open file by using right mouse menu option PASTE or short cut key CTRL + V.

ⓘ The menu option Copy to clipboard is controlled by the user right Copy to clipboard from HTML under Users → User Definition → Rights → Miscellaneous

The Quick Keys

Suite8 allows you to select the Quick Keys main menu from any screen. The quick keys are shortcuts to screens, searches, and desktop tools. Using these keys allows rapid access to information without having to leave the section that you are currently working on. For example, a customer is making a new reservation while at the same time asking questions about restaurants in the area. You can use the Telephone Book quick key for restaurant information instead of aborting the new reservation screen, looking up the restaurant information, closing the Telephone Book, and reopening the new reservation screen.

To access the Quick Keys main menu

▪ Click the QUICK KEYS menu option.

The Quick Keys menu is displayed.

Arrivals	Ctrl+A
Availability	Ctrl+D
Billing	Ctrl+B
Calendar	F4
Conference Diary	F3
Conference Floor Plan	Shift+Alt+F3
Currency Calculator	Shift+Alt+R
Event Vacancies	Ctrl+Shift+F3
Event Waitlist Priority	Ctrl+W
Floor Plan	Ctrl+F
Goals	Ctrl+Shift+G
Group Reservation	Ctrl+G
Hotel Segment Statistics	Ctrl+Shift+S
House Status	Ctrl+H
Inhouse Guests	Ctrl+I
Interface Functions	Shift+F8
Logbook	Shift+Alt+L
Maximum Availability	Ctrl+Shift+M
Messages	Ctrl+M
New Reservation	Ctrl+N
Postings	Ctrl+E
Profiles	Ctrl+P
Quick Reservation	Ctrl+Q
Rate Query	Ctrl+R
Reports	Ctrl+Shift+R
Room Rack	Ctrl+L
Room Search	Ctrl+S
Room Type Availability	Ctrl+Shift+D
Space Occupancy	Ctrl+F3
Table Reservation	Ctrl+Shift+A
Telephone Book	Ctrl+T
Update Reservation	Ctrl+U

The Date Box

The format of the dates and the separators between the dates may vary from one hotel to another. The date format is defined in the Control Panel Windows Regional Settings/Options.
Typical date formats include the following:

- dd/yy
- MM/dd/yyyy
- yy/MM/dd
- yyyy-MM-dd
- dd-MMM-YY

You can type the date directly in the date box; however it must be typed exactly as per the pre-defined format.
There are many date boxes in the system, for example, Arrival Date or From Date. The date can be either a specific date or an as of date.

Arrival date   01/03/2011 ▾   From: 01/03/2011 ▾

A specific date is when you need to see what happened on that day. For example, you need to see which guests have departed 01/01/03.
An 'as of date' is when you need to find out information starting from that date. For example, you need to read the room rack starting from 09/09/03 through 12/09/03.

Changing the date

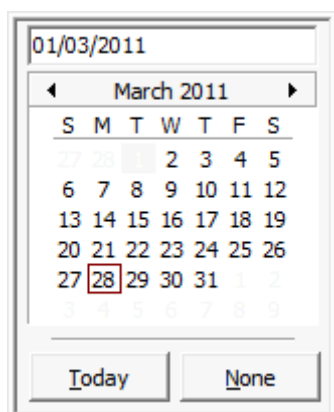The date can be changed by typing a new date or with the use of the calendar.

To type a new date

1. Place the cursor in the Date box.

2. Type the new date in the Date box, in the defined format including separators.

3. Press the **Tab** key, the date is changed.

To change a date using the calendar

1. Click the drop down arrow ▾ next to the Date box.

   The calendar appears.

   01/03/2011

   ◄   March 2011   ►

S	M	T	W	T	F	S
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

   Today   None

2. Change the month to a previous month or future month by clicking the horizontal arrows located on the top of the calendar or by pressing the **Ctrl + Page Up or Ctrl + Page Down key.**

3. Place the cursor on the date and click the left mouse button **or** move the keyboard arrow keys to locate the date and press **Enter**, the date is changed.

Customising Suite8 Grids

Many of the grids in Suite8 may be customised according to the needs of the property.
The customization options available are:

- CUSTOMIZE - opens the customize dialog box so that columns on the grid can be added, changed or removed.
- RESTORE DEFAULTS - applies the default settings for this grid.
- SHOW DEFAULTS - applies the default settings to the current grid view, however, any customised settings are used the next time the grid is displayed.
- Select PRINT to print or export the existing grid layout, the possible export formats are ASCII File, CSV Format, HTML Document or an Excel Document.
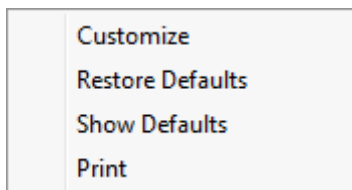
> **Note:** The print or export function should be used before changes to the grid will be saved.

How to customize a grid

1. Place the cursor in the grid and right-click to display the short-cut menu.

2. Select CUSTOMIZE to open the customize screen.
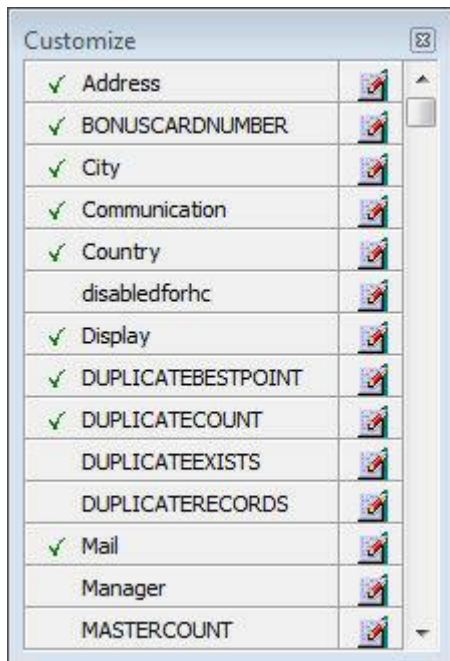
The fields already used are marked with a green check mark.

3. Click the PENCIL button to view or change the column properties.

Column Properties

Field	Description
Field name	The field name as it is defined in the database table.
Caption	The field caption.
Fixed	Defines if the column will be fixed to the left side, when scrolling to the right to view additional fields of the grid. Columns marked as fixed are highlighted grey.

4. To move a field to the grid, select the field and drag it to the required position.

5. Click the ⊠ in the top right-hand corner to close the customize screen.

6. A message is displayed asking if you want to store the grid layout.

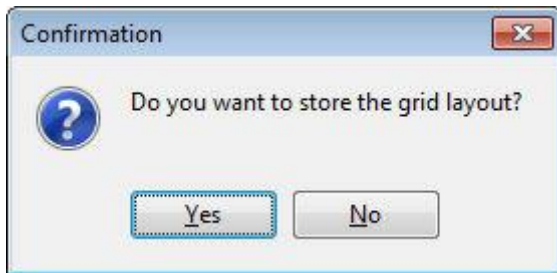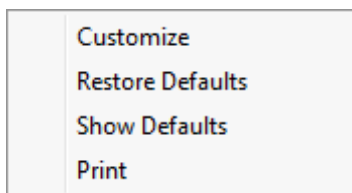7. Select YES to save the changes or NO not to save any changes.

How to remove a column from a customized grid

1. Place the cursor in the grid and right-click to display the short-cut menu.

2. Select CUSTOMIZE to open the customize screen.

   The fields already used are marked with a green check mark.

3. On the grid point to the column to be removed and drag it to the customize screen; yellow arrows are displayed at each end of the column name.

   Once the column has been removed the green check mark is removed from the field name on the customize screen.

4. Click the ⊠ in the top right-hand corner to close the customize screen.

5. A message is displayed asking if you want to store the grid layout.

6. Select YES to save the changes or NO not to save any changes.

How to create a customised grid view for profile search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the profile search.

ⓘ This functionality is controlled by the parameter Custom view in Profile Search under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_sys_customxcmssearch has to be amended.

Example: *"Adding the financial account long description to the profile navigator"*

The view has to be changed as follows:

CREATE OR REPLACE FORCE VIEW v8_sys_customxcmssearch

(customxcmssearch_xcms_id, zfac_longdesc)

AS SELECT xcms_id customxcmssearch_xcms_id,

(select zfac_longdesc from zfac where zfac_actvalidfrom is not null and zfac_actvaliduntil is null and xcms.xcms_id=zfac.zfac_xcms_id and rownum=1)

zfac_longdesc

from xcms;

The fields from the custom view are automatically added to the grid.

How to create a customised grid view for reservation search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the reservation navigator.

ⓘ This functionality is controlled by the parameter Custom view in Res. Navigator under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_sys_customxcmssearch has to be amended.

Example: *"Adding the housekeeping status to the reservation navigator"*

How to create a customised grid view for booking search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the event booking search.

ⓘ This functionality is controlled by the parameter Custom view in Booking Search under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_sys_custommybomsearch has to be amended, however it must contain the field customybomsearch_ybom_id.

Example: *"How to display the function type description"*

The view has to be changed as follows:

CREATE OR REPLACE FORCE VIEW V8_SYS_CUSTOMYBOMSEARCH

AS

SELECT

ybom_id customybomsearch_ybom_id,

yfty_longdesc

from

ybom, yfty

where

ybom_yfty_id=yfty_id(+);

ⓘ Customization functionality is controlled by the user right Edit under Setup → Configuration → Users → User Definition → Rights → Miscellaneous → Grid layout Customization.

ⓘ Print functionality is controlled by the user right Print Grid under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Customising the HTML display

The HTML display may be customised according to the requirements of the property. The customization options available when placing the cursor on the HTML display and right-clicking are:

- PRINT - prints an exact copy of the HTML display. The print page margins and the actions to take if the HTML printout is too large for the defined paper size can be defined in the configuration.
- PRINT WITH SETUP - displays the printer options and then print the HTML display.
- VIEW SOURCE - displays the HTML code; no changes can be made.
- EDIT TEMPLATE WITH NOTEPAD - opens the relevant *.htm and *.qry in notepad. Users with HTML programming knowledge can edit these files to meet the requirements of the property.
- EDIT TEMPLATE WITH ASSOCIATED APPLICATION - opens the relevant *.htm and *.qry with the program associated with these file types. Users with HTML programming knowledge can edit these files to meet the requirements of the property.

How to use HTML Expressions to customize the HTML display

Properties can configure and store customised html files in the Version 8 directory for htm files. The files are displayed in Suite8 either by logged in user, user language, customised htm files for all users or language specific htm files for all users.

The priority Suite8 uses to determine which file to use is in the sequence as listed:

- Customised htm file by user initials

  To display a customised htm file by user initials, the htm file has to be called USR_USERINTIALS_HTMFILENAME.HTM.

  Example: For a user with the initials DS the file has to be called usr_ds_quickinfo.htm.

- Customised htm file by user language

  To display a customised htm file by user language, the htm file has to be called CUST_LANG_LANGUAGE SHORT DESCRIPTION_QUICKINFO.HTM.

  Example: If the language short description is F for French, the user has to select this language under User Settings → Startup → Language and the file, such as quickinfo.htm has to be called cust_lang_f_quickinfo.htm.

- Customised version for all users

  To display a customised version of htm files for all users, the html files have to be called CUST_HTMLFILENAME.HTM.

  Example: cust_quickinfo.htm.

- Customised version by language

  To display a customised version by language, the html files have to be called LANG_SHORT DESCRIPTION OF THE LANGUAGE_HTMLFILE.HTM.

  Example: lang_f_quickinfo.htm, where f stands for the short description of the language.

If none of these files can be found then the standard htm file is displayed

How to hide or show expressions depending on activated features or license

The following expression can be used to hide for example, Conference Information on the HTM file when working with the small business edition:

if ({const isBnB})=(1)}{/if}{else} {if {feature Meeting Planner}} Conference {runquery 2}

ⓘ Customization functionality is controlled by the user right HTML source view and edit under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

ⓘ The print page margins and the actions to take if the HTML printout is too large for the defined paper size are defined via the option HTML printout under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4.

Favourites

The Favourites shortcut toolbar allows you to keep your most frequently used options right where you can find them. Your most used options can be added to the Favourites shortcut toolbar where they are more noticeable and more easily organized to suit your purposes.

To make the most of the Favourites shortcut toolbar, you need to organize the options in it; this can be done using drag and drop.

In user settings the Favourites shortcut toolbar can be set to be listed first and will then be the default shortcut toolbar opened when logging on to Fidelio.

> **Note:** The Favourites shortcut toolbar cannot be removed from the toolbar.

How to add an option to the Favourites shortcut bar

1. Click one of the coloured shortcut toolbars on the left to list the options on that toolbar.

2. Right-click the option that you want to add, and then click ADD TO FAVOURITES on the shortcut menu.

   The option is now listed on the Favourites shortcut toolbar.

3. Repeat Steps 1 and 2 for each option that you want to add.

> **Note:** Options from Web Services cannot be added to the Favourites shortcut toolbar.

How to delete an option from the Favourites shortcut bar

1. Click the FAVOURITES shortcut toolbar on the left to list the options.

2. Right-click the option that you want to remove, and then click DELETE BUTTON on the shortcut menu.

   The option is removed from the Favourites shortcut toolbar.

3. Repeat Steps 1 and 2 for each option that you want to remove.

How to reorganise the options on the Favourites shortcut bar

1. Click the FAVOURITES shortcut toolbar on the left to list the options.

2. Select the option to be moved and then left-click and hold the mouse button while you drag the option to its new location on the toolbar.

3. Repeat Steps 1 and 2 for each option that you want to move.

ⓘ On the toolbar the Favourites shortcut bar can be listed first by selecting the option Favourite buttons on top under Miscellaneous → User Settings → Appearance Tab.

Logging off, Exiting Suite8 and Locking the Station

The windows menu consists of the following options:

▪ Close All - closes all open screens and dialog boxes.

▪ Lock Station - locks the workstation.

▪ Logout - closes all open screens and logs off Suite8.

▪ Exit Application - closes all open screens and exits the application.

Options	Description
Close All	▪ Click the WINDOWS menu and the option CLOSE ALL. All open screens and dialog boxes are closed.
Logout	1. Click the WINDOWS menu and the option LOGOUT All open screens and dialog boxes are closed and the Login screen appears. A new user can now login. 2. To close the application completely click CANCEL. Suite8 is closed and the desktop appears.
Exit Application	▪ Click the WINDOWS menu and the option EXIT APPLICATION. Suite8 is closed and the desktop appears.
Lock Station	▪ Click the WINDOWS menu and the option LOCK STATION. All open screens and dialog boxes are closed and the Login screen appears. A new user can now login.

ⓘ Lock Station - the open screens and dialog boxes from the user who locked the station will not be closed if the parameter Leave opened screen on Switch User is selected under Setup → Configuration → Global Settings → Generic → Generic 3 tab.

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