Oracle® Hospitality Simphony 2.7 Documentation Library Overview

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ORACLE

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Introduction

This library contains articles describing how to use Simphony features and functionality. These articles are PDF versions of articles originally published on the MICROS Members or Wiki pages. They reflect the MICROS branding associated to the product for that release. PDF renderings may cause some distortion in the content.

Add/Transfer Check

The term **Transfer Check** means to give ownership of a check from one operator to another, or to transfer from one Revenue Center to another. The term **Add Check** means to combine two checks together while in a transaction. A check can be transferred or added by Check Number, Check ID, Table Number, or Transfer Check SLU, although users typically transfer checks by Check Number.

This article discusses the usage of one or more **Function Keys**. (499-519, 437)

This article discusses behavior that is important for **Reporting**.

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Why Add or Transfer?

Transfer

A check transfer may occur for several different reasons depending on business practices, but here are two common reasons why it is used:

- A couple arrives at a restaurant to find that there are no tables currently available. These customers go to the bar Revenue Center to have a couple drinks. (The bartender starts their check.) When a table opens, the check is transferred from the bartender to the server, so the customer only has to pay one check at the end of their visit.
- A bartender is working the day shift, 11am - 5pm. At 5pm, a new bartender comes in. The daytime bartender has to leave, so the new bartender transfers the check(s) owned by the daytime bartender.

Add

Checks may be added together for similar business practices:

- This functionality may be used when one customer asks to pay another customer's bill.
- Checks may be added together when an operator accidentally began two checks for the same customer

Security

Who transfers to whom?

A general note for all check adding/transferring is this: a user can only transfer a check IN to themselves. What is meant by this? A user *cannot* transfer a check OUT, to other users. (If a user could transfer checks out, a dishonest employee may transfer checks to other employees, making it look like the other employees owe the balance of the check.)

What about sales?

Similarly to the last section, it should be noted that an employee's sales are never transferred.

- Employee A begins a check and rings $100 of sales
- Employee B transfers the check, adds $10 of sales, and pays it

In this scenario, Employee A has $100 in sales; Employee B has $10. It would be a security problem (or more likely, a tax problem with the government) if employees could move sales to other employees.

Transfer vs. Add

The same function keys are used for adding checks and transferring them. The term "add check" means to combine two checks, while "transfer check" means to take a check from another operator or Revenue Center. The same function key is used in both instances:

- When a user is in a transaction, the Add/Transfer key is "adding" two checks together.
- When a user has not yet begun a transaction (he/she is on the Default Transaction Screen), the Add/Transfer key is "transferring" ownership of the check.

Standard Function Keys

Several function keys exist to allow transferring checks:

437 - Add/Transfer by ID
: This key is used to Add or Transfer a check by ID.

499 - Add/Transfer Check SLU
: When this key is pressed, the workstation will display a SLU of checks that can be transferred or added from other operators in the RVC.

500 - Add/Transfer by Number
: When this key is pressed, the workstation will ask for the check number to be added or transferred. This function key will add/transfer checks only within the current RVC of the workstation or transaction.

501 - Add/Transfer by Check # RVC?
: This key is used to add or transfer a check by check number, from one of the eight Revenue Centers assigned in the Add/Transfer section of the Revenue Center Parameters module. When this function key is used, the operator must first select the Revenue Center, and then enter the check number.

502-509 - Add/Transfer by Check # RVC 1-8
These eight keys are used to add or transfer a check by check number, from one of the specific Revenue Centers assigned in the Add/Transfer section of the Revenue Center Parameters module. For instance, if the **[Add/Transfer by Check# RVC 2]** function key (503) is used, the check will be added/transferred from the RVC #2 specified in RVC Parameters.

510 - Add/Transfer by Table Number
When this key is pressed, the workstation will ask for the table number to be added or transferred. This function key will add/transfer checks only within the current RVC of the workstation or transaction.

511 - Add/Transfer by Table # RVC?
This key is used to add or transfer a check by table number, from one of the eight Revenue Centers assigned in the Add/Transfer section of the Revenue Center Parameters module. When this function key is used, the operator must first select the Revenue Center, and then enter the table number.

512-519 - Add/Transfer by Table # RVC 1-8
These eight keys are used to add or transfer a check by table number, from one of the specific Revenue Centers assigned in the Add/Transfer section of the Revenue Center Parameters module. For instance, if the **[Add/Transfer by Table# RVC 2]** function key (513) is used, the check will be added/transferred from the RVC #2 specified in RVC Parameters.

Other Function Keys

There are two function keys that allow a user to transfer some or all of the checks at one time. These functions are discussed on the Block Transfer page.

- 520 - Block Transfer
- 521 - Auto Block Transfer

Transferring from one RVC to another

Tax implications

What happens when transferring a check from RVC to RVC? Does tax get recalculated?

1. **Scenario #1: Order Type Masking**
    - Setup two Tax rates
    - Tax Class #1 has both rates enabled
    - Serving Periods in both RVCs have both tax rates enabled
    - Order Type in RVC 1: Tax 1 enabled, Tax 2 disabled
    - Order Type in RVC 2: Tax 1 disabled, Tax 2 enabled
    - **What happens:**
        - Transferring a check between RVCs makes the Tax recalculate.
2. **Scenario #2: Order Types**
    - Setup two Tax rates
    - Tax Class #1 has both rates enabled
    - Serving Periods in RVC 1: Tax 1 enabled, Tax 2 disabled
    - Serving Periods in RVC 2: Tax 1 disabled, Tax 2 enabled
    - Order Types in both RVCs have both rates enabled
    - **What happens:**
        - Transferring a check between RVCs, the taxes DO NOT recalculate. Is this wrong?
            - This is not wrong. Upon further investigation, the issue really has nothing to do with transferring between RVCs at all...

- If I'm in RVC 1 and Lunch Serving Period has Rate 1 active (and Rate 2 inactive), while Dinner Serving Period has Rate 2 active (and Rate 1 inactive), does tax get recalculated? No. If I ring a Coke in Lunch, tax isn't recalculated on that existing Coke item when it becomes dinner (new items will receive the new tax). This is no different when moving a check from one RVC to another.
- If I'm in RVC 1 with "Dining" Order Type active, and I switch to "To-go" Order Type, does tax get recalculated? Yes. The check total will change accordingly for existing items on the check. Again, this behavior is seen within a RVC and also when transferring from one RVC to another one, so there is no bug.

3. **So, in the end, what have we learned?**
   - Changing the Order Type will recalculate taxes on a check. Otherwise, tax is relatively static.

Auto Gratuity

Checks can be transferred between RVCs only when the Automatic Service Charge for the RVCs is the same. The following chart summarizes the behavior:

Auto Service Charge of Current RVC	Auto Service Charge of Check's RVC	Can Transfer?
0	0	YES
0	1	NO
1	0	NO
1	2	NO
2	2	YES

Privileges

Four Employee Role option bits determine if an operator is privileged to perform Add/Transfer operations.

Authorize Adding of Checks in the Same Revenue Center
: Select this option to allow employees associated with this Role to add checks (to be in a check, and add another check to it) within a Revenue Center, and to authorize non-privileged employees to do so as well.

Authorize Adding of Checks Between Revenue Centers
: Select this option to allow employees associated with this Role to add checks (to be in a check, and add another check to it) from another Revenue Center, and to authorize non-privileged employees to do so as well.

Authorize Transfer of Checks in the Same Revenue Center
: Select this option to allow employees associated with this Role to transfer checks from another operator within the same Revenue Center, and to authorize non-privileged employees to do so as well.

Authorize Transfer of Checks Between Revenue Centers
: Select this option to allow employees associated with this Role to transfer checks from another Revenue Center, and to authorize non-privileged employees to do so as well.

Adding an Employee 2x

Adding an Employee is a different process than adding records in other EMC modules. In the Employee Maintenance module, a user has the ability to add Employee Records (Enterprise level), Property Employee Records (property level) and Operator Records (Revenue Center level). This article discusses how to add an Employee record from the Enterprise level while also adding its Property Employee Record and Operator record at the same time.

This article contains a **best practices** section.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

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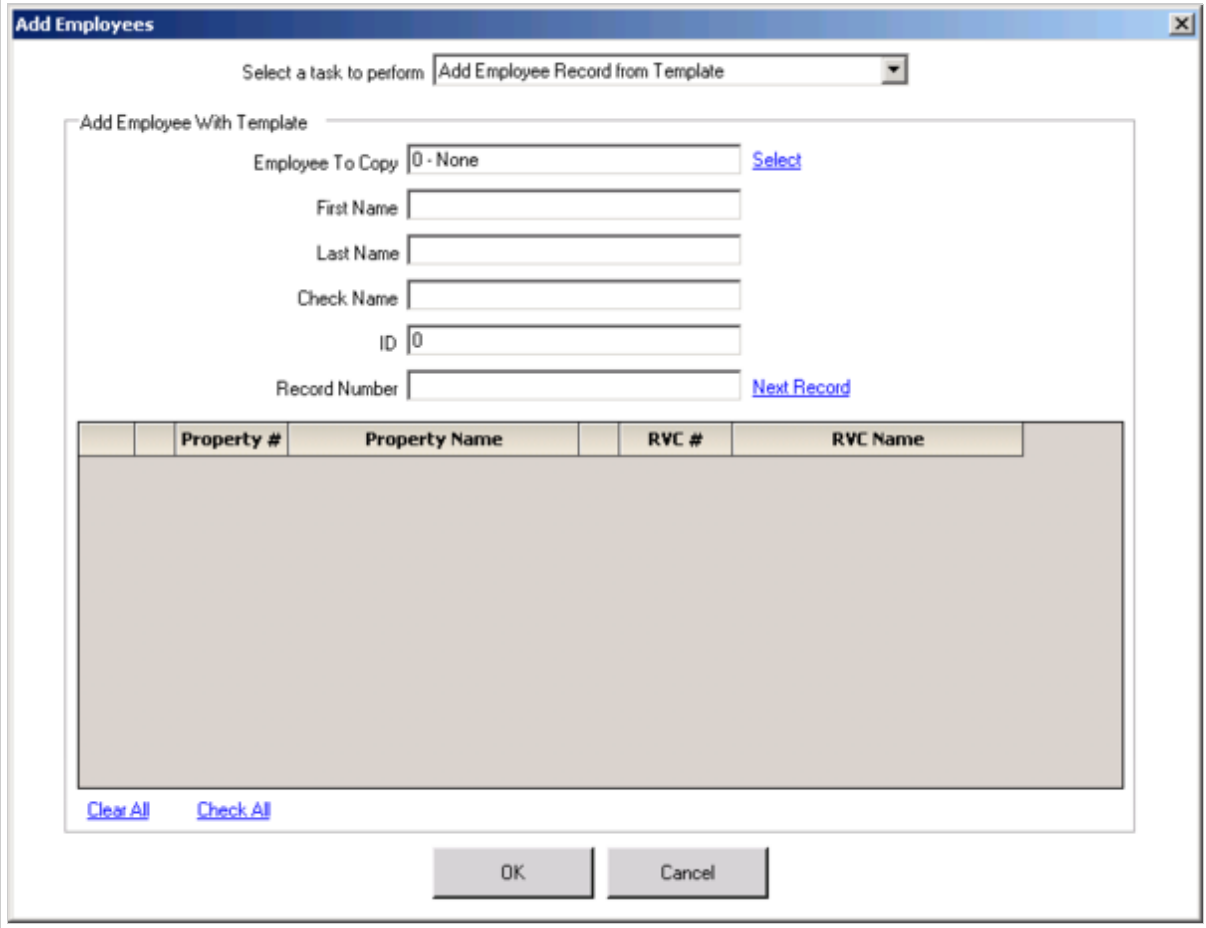
- 3 Best Practices

Steps for Adding an Employee

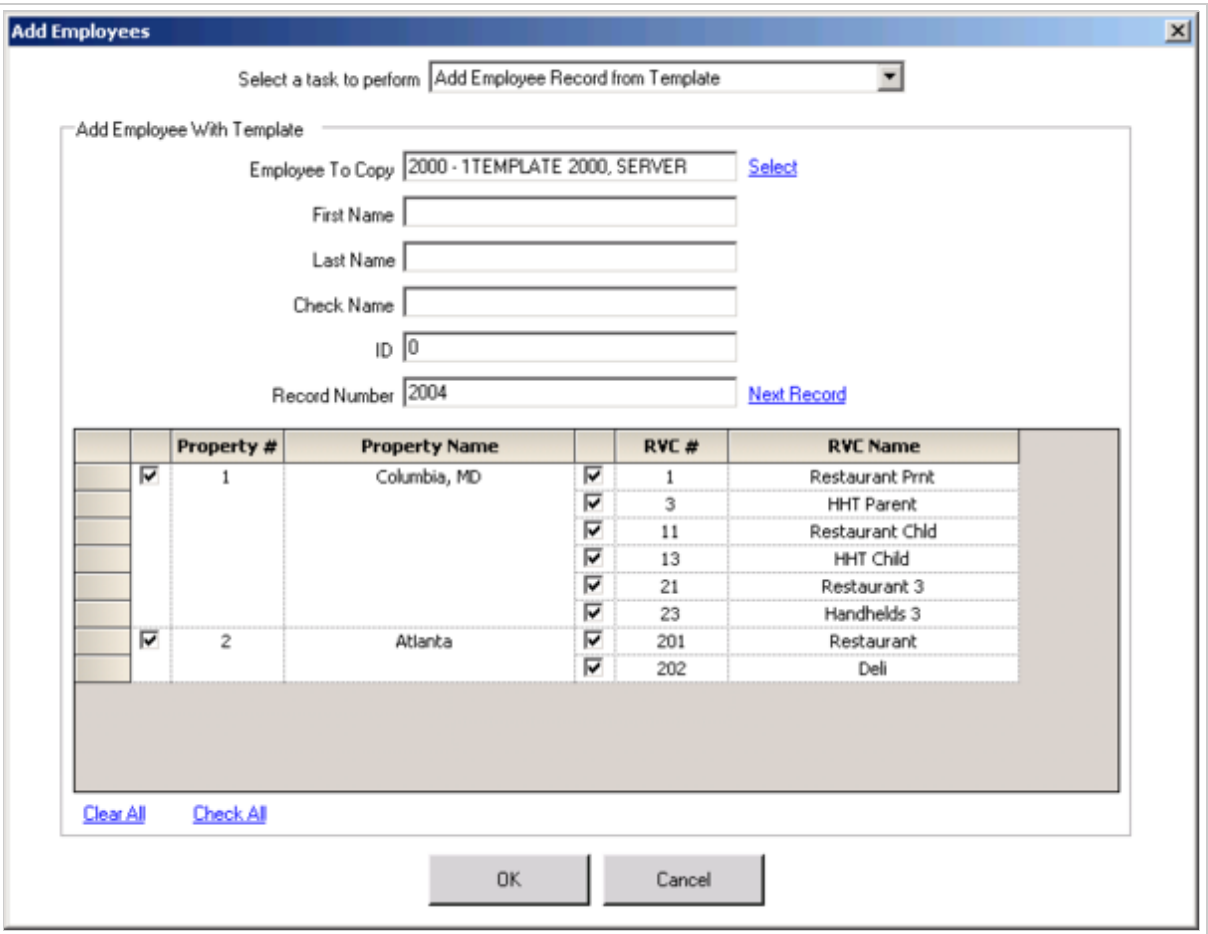
To add an Employee, perform the following steps:

1. Open the



When the dialog displays initially, all fields are blank. If the dialog is opened after an Employee Record

has been selected, the selected Employee defaults as the template record.



After selecting "TEMPLATE SERVER" as the template, the grid displays all the Property Employee Records and Operators associated with "TEMPLATE SERVER". Note that only the checkbox cells in this grid can be edited; all other cells are read-only.

Employee Maintenance module

2. Press the Add Record icon from the toolbar.
    - If Employee Maintenance was opened from the Enterprise Scope, the insert dialog defaults to "Add Employee Record from Template".
    - If Employee Maintenance was opened from the Property/RVC scope, choose "Add Employee Record from Template" from the "Select a task to perform" drop-down.
3. Select the template record by pressing "Select" next to the "Employee to Copy" field.
4. After selecting the template record, configure the following fields:
    - The **First Name** of the new employee.
    - The **Last Name** of the new employee.
    - The **Check Name** of the employee (optional)
    - The **ID Number** of the employee (optional)
    - The **Record Number** of the employee. By default, this field displays the next available record number after the selected record to copy. A user can change the record number; to return the field to its default value, press "Next Record"
    - The **Property** or **Properties** where the new employee will work. Property Employee Records are not always created for the same Properties as the template Employee; to quickly check or uncheck all the properties, use the "Check All" and "Clear All" links below the grid.

    - The **RVC(s)** where the new employee will work. Usually, Operator Records are created for the same RVCs as the template Employee, so these checkboxes remain checked.
5. Press OK. At the prompt "Add this employee?", choose Yes.
6. After the item is added, another prompt occurs: *This record was added successfully. Add another employee?*
    - Yes: The name field becomes empty and the record number updates to the next available record number. At this point, the user is at step #4 of these instructions.
    - No: The dialog closes.

Other Considerations

There are other considerations when using this dialog:

- If the user does not have Enterprise Role permissions to add Employee records, the "Add Employee Record from Template" option will not appear in the "Select a task to perform" drop-down.
- If one Employee record is selected in Table View before entering this dialog, the dialog will default to using that record as the "Employee to Copy".
- If viewing an Employee in Form View, this dialog defaults to the selected Employee Record.
- All the fields in the grid are read-only except for the checkbox columns.
- Properties appear in the grid when these conditions are met:
    - The template Employee record has a Property Employee Record in the Property
    - The logged-in user is able to view the Property, based on Property-Level Security settings.
    - Employee Maintenance was opened from the Enterprise Scope. (If opened from the Property or RVC scope, the grid limits the view to the Property Employee Records from the current Property.)
- RVCs appear in the grid under similar conditions:
    - The template Employee record has an Operator Record in the RVC
    - The logged-in user is able to view the RVC, based on RVC-Level Security settings.
    - Employee Maintenance was opened from the Enterprise or Property Scope. (If opened from the RVC scope, the grid limits the view to the Operator Records from the current RVC.)

Best Practices

- In Employee Maintenance, system administrators often create "template" employee records; these records have no other purpose than to be used for creating other employees.

- In the example image, the "TEMPLATE SERVER" record was selected. At some sites, administrators configure the system so that employees who perform similar tasks are given Employee Numbers in a dedicated range. While this is not mandatory, it is helpful in some environments. With this configuration, when a template employee is selected ("2000", in the image), the dialog will create the next record at the first available space after the template ("2004", in the example). This type of environment may have ranges such as:
    - 2000-2999 = Servers
    - 3000-3999 = Bartenders
    - 9000-9999 = Managers

Employee Number Ranges are not typically used in Enterprise environments. The sample ranges discussed here allow only 999 employees per job type; this would be insufficient for very large installations.

MICROS recommends, as a Best Practice, creating template employee records. After creating template employee records, the task for adding new employees is simplified to the following:

1. Select the template record in the Add Wizard
2. Configure the appropriate fields for the new employee (First Name, Last Name, etc.)
3. Choose the Properties/RVCs where the employee will work. Note that for workstation users like servers and bartenders, it is typical that only one Property is selected. Because of this, the "Clear All" link lets the EMC user uncheck all the properties immediately; then the specific property can be selected.

With this method, employees are created quickly and easily, removing most of the opportunities for programming errors.

Adding a Menu Item 2x

Adding a Menu Item *is a different process than adding records in other EMC modules. In the Menu Item Maintenance module, a user has the ability to add Master Records, Definition Records and Price Records. This article discusses how to add a Menu Item Master Record in 2x where definitions and prices are added at the same time for the entire Enterprise. For specific information on adding masters, definitions, and prices individually, see the appropriate article: Adding Menu Item Masters, Adding Menu Item Definitions, Adding Menu Item Prices.*

This article discusses functionality that relates to **Simphony v2.x**.

This article contains a **best practices** section.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

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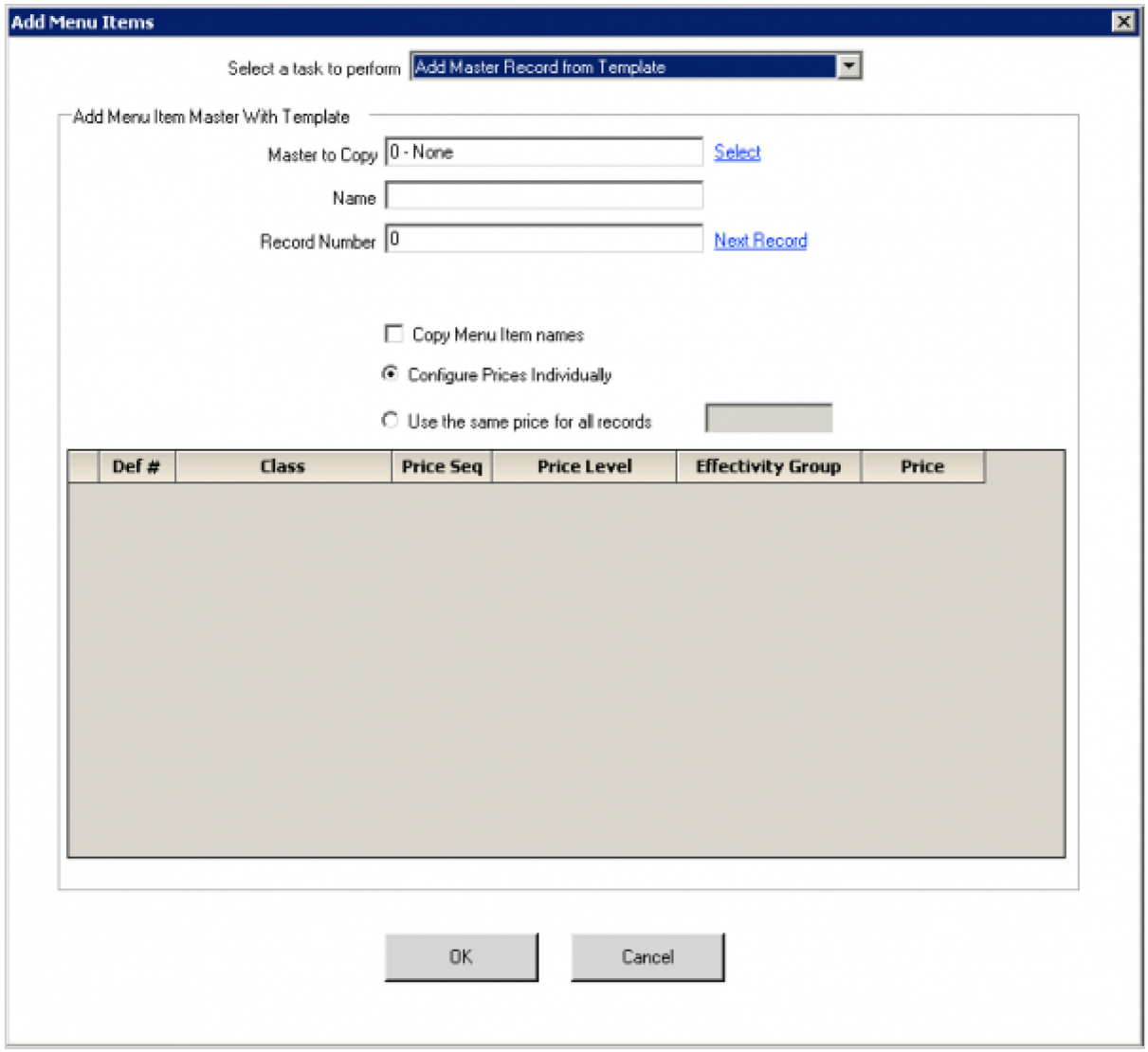
Steps for Adding an Item

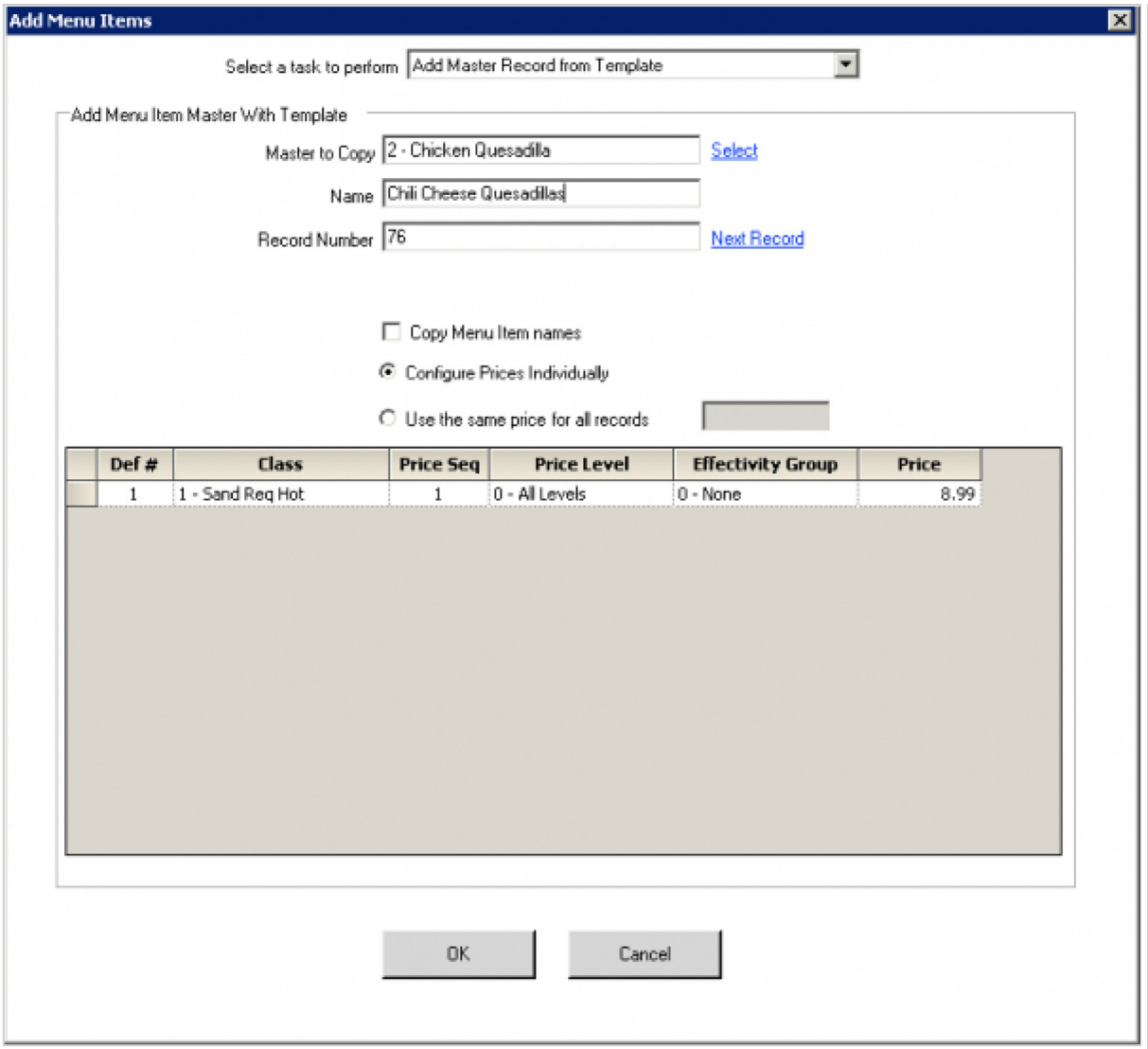
To add a Menu Item, perform the following steps:

1. Open the Menu



When the dialog displays initially, all fields are blank. If the dialog had been opened after a Menu Item Master record was selected, its values would display.

Item



Once the new item is entered in, note that only the price can be edited, and only when the "Use the same price for all records" is selected.

Maintenance module

2. Press the Add Record icon from the toolbar.
   - If Menu Item Maintenance was opened from the Property Scope, the insert dialog defaults to "Add Master Record from Template".
   - If Menu Item Maintenance was opened from the Revenue Center Scope, choose "Add Master Record from Template" from the "Select a task to perform" drop-down.
3. Select the template record by pressing "Select" next to the "Master to Copy" field.
4. After selecting the template record, configure the following fields:
   - The **Name** of the new item
   - The **Record Number** of the item. By default, this field displays the next available record number after the selected record to copy. A user can change the record number; to return the field to its default value, press "Next Record"
   - Select the **Copy Menu Item Names** checkbox to have all of the existing primary and foreign names—including the Long Descriptor(s)—copied from the original Menu Item to the new Menu Item. (This field displays only when "Add Master Record from Template" is selected above.)
   - The **Price(s)** of the item:
     - Configure Prices Individually: For some items, multiple definitions and prices exist. For these items, "Configure Prices Individually" is usually the best option. For example, the image shows "Vanilla Vodka" as a template. This item has multiple definitions and prices.

        - Use the same price for all RVCs: For items that have the same price in every RVC (soda, perhaps), it is easier to enter a single price that applies to all RVCs. This configuration would be used in a situation where a site with many unshared RVCs has standard pricing for certain items. For instance, an amusement park may have 35 Revenue Centers that charge $3.00 for a soda. When adding a "diet soda" item for that site, it is easier for the site to use the "Use the same price for all RVCs" option, instead of entering a price amount 35 times.
    - The **RVC(s)** where the item will be created (checkboxes in the grid). Usually, definitions are created in the same RVCs as the template item, so these checkboxes remain checked.
5. Press OK. At the prompt "Add this menu item?", choose Yes.
6. After the item is added, another prompt occurs: *This record was added successfully. Add another menu item?*
    - Yes: The name field becomes empty and the record number updates to the next available record number. At this point, the user is at step #4 of these instructions.
    - No: The dialog closes.

Other Considerations

There are other considerations when using this dialog:

- If the user does not have Employee Role permissions to add Menu Item Master records, the "Add Master Record from Template" option will not appear in the "Select a task to perform" drop-down.
- If one Menu Item Master record is selected in Table View before entering this dialog, the dialog will default to using that record as the "Master to Copy".
- If viewing a Menu Item Master's Definition Summary in Form View, this dialog defaults to the selected Master Record.
- All the fields in the grid are read-only except for the checkbox column and the price column. All other columns are provided for informational purposes only.
- Revenue Centers appear in the grid when these conditions are met:
    - The template Menu Item Master record has a definition in the RVC
    - The user is able to view the RVC, based on RVC-Level Security settings.
    - Menu Item Maintenance was opened from the Property Scope. (If opened from the RVC scope, only the current RVC's definitions will display.)

Best Practices

When creating a new property and adding several items at a time, the ideal method for setting up items is to create a record that belongs to a Major/Family group, then to create all other records in the same Major/Family group using the initial record as a template. For example, when creating appetizers:

1. Set up one Menu Item Master in the Food Major Group and Appetizer Family Group
2. Create all its definitions/prices.
3. Now create the other appetizers based on this definition

With this method, some minor changes will be needed after the definitions are created for the items. Menu Item Classes, for instance, aren't all the same within the same Family Group (some appetizers will print to the Hot Printer while others will not). Even with these minor changes, this method of inserting new menu item records is, by far, the most efficient method possible.

Adjust Closed Check

Adjust Closed Check is a function key that allows an operator to change or add a tip and/or tender on a closed check, or to change the number of guests. Unlike the Reopen Closed Check function, which actually opens a check to be used as a regular guest check again, the Adjust Closed Check function prevents the users from altering anything on the check but the tip, payment, or guest count. Often, Employee Roles are set up to allow the average user (bartender, waiter, etc.) to adjust checks but not to reopen them.

This article discusses the usage of one or more **Function Keys**. (422, 442)

This article discusses behavior that is important for **Reporting**.

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Example Usage

A guest check is closed with a CASH tender key. After the customer pays and leaves, the server realizes that the customer paid with a VISA card, even though the check was accidentally closed to cash. The server uses the **[Adjust Closed Check]** function key to change the tender from CASH to VISA.

Steps to adjusting closed check:

1. The operator presses the **[Adjust Closed Check]** function key and enters the check number.
2. BOB prompts, `Adjust this closed check?`. At this time the Check Summary Area of the workstation shows some information about the check.
   - If multiple checks exist with the same check number, pressing **[Clear (no)]** will move the workstation to the next check number in the list, again prompting for `Adjust this closed check?`. A user can continue to answer **[Clear (no)]** until the appropriate check is listed.
3. Once the appropriate check has been displayed, press **[Enter (yes)]**

4. Now you are in adjust check mode. In some good databases, the **[Adjust Closed Check]** key has a TS-Next screen attached to it, and you'll be taken to the payment screen.
5. From the payment screen, select "Cash" in the Check Detail Area and perform a touch-void.
6. Then, pay the check to VISA.

Notes

- Once in adjust check mode, it is possible to use the **[Cancel Transaction]** function key (605) at any time to exit the check.
- Once in adjust check mode, it is not possible to service total the check without printing; it is only possible to pay or print.

Printing Adjusted Checks

When a closed check is adjusted, the result prints at the designated guest check printer. The detail that prints is determined by the nature of the original check:

- If the adjusted check was an On-demand guest check, or a fast transaction that was service totaled by an On-demand operator, the entire check is reprinted, showing the new information (e.g., the new method of payment).
- If the adjusted check was a By-round guest check, a Special By-round guest check, or a fast transaction that was service totalled by a By-round operator, a chit prints that shows the nature of the adjustment (e.g., the void of the original payment, and the posting of the new payment).

In either case, the text **`ADJUST CLOSED CHECK`** prints at the top of the transaction detail in double-wide characters.

Reporting

For Report Writer reports, a “j” prints in the status field for any check that has been adjusted. The PMC Reports use a capital letter (“J”).

Adjusting from Previous Business Days

While the **[Adjust Closed Check]** function key (422) only allows checks from the current business day to be adjusted, another function, 442, **[Adjust Closed Check (Prev. Days)]** allows check adjustments to occur for the current business day *and* previous business days, for a pre-defined number of days. The number of days allowed for adjusting closed checks is configured in RVC Parameters on the Posting and Control tab.

Workstation Usage

To use this key at the Workstation:

1. Press the **[Adjust Closed Check (Previous Days)]** function key (423)
2. When the key is pressed, the workstation will allow checks to be adjusted for the current Revenue Center, for the number of days specified in the RVC Parameter field.
    - If the field is set to 0, only the current business day’s checks will be accessible.

Reporting

Reporting numbers for a previous day cannot be changed by use of the **[Adjust Closed Check from Previous Business Days]** function keys. When a check is adjusted from a previous day, only the current day's checks and totals are affected. It should be noted that adjusting from a previous day will make reports seem "out of balance" for a day. However, when reports are taken for a larger period of days (including the date of the original check and the date of the adjustment), the reports are indeed "in balance." Please reference the following examples:

Example 1

Here's an example of adjusting Check #1000 from April 10, closed for $10.00. To make this example simple to follow, no other checks are opened in the system. This check is adjusted on April 15.

The user adjusts the check, voids the payment (cash) and applies a new payment (credit card). The Checks section of Financial Reports shows no change. The tender section, however, will show:

```
Cash        -1 -10.00
Credit Card  1  10.00
```

Taking a report for the entire period (for instance, the week including April 10 and April 15), the report shows:

```
Cash         0   0.00
Credit Card  1  10.00
```

Example 2

Another example of adjusting Check #1000 from April 10, closed for $10.00. To make this example simple to follow, no other checks are opened in the system. This check is adjusted on April 15.

The user adjusts the check, voids the payment (cash) and applies a new payment (credit card) including a $2.00 tip. The top section of the report will show:

```
Service Charges   1   2.00
Checks Begun      0   2.00
Checks Paid       0   2.00
```

The tender section of the report will show -10.00 cash, and 12.00 for the credit card payment.

Taking a report for the entire period (for instance, the week including April 10 and April 15), the report shows:

```
Checks Begun      1 12.00
Checks Paid       1 12.00
Net Sales           10.00
Service Charges   1  2.00
Total Revenue       12.00
```

The tender section of the report will show 12.00 for the credit card payment, and 0.00 for cash.

Other Considerations

Generally, the Adjust Closed Check function keys should be programmed on the Default Transaction Screen. Additionally, there are considerations to keep in mind when adjusting checks from a previous day:

- While the maximum value of the RVC Parameter fields "Number of Days to Adjust Closed Checks" is 999 days, checks are purged from the Simphony system after approximately six weeks. Therefore, it is typically not possible to adjust checks that are more than six weeks old.
- It is not possible to void a credit card payment on a check when that credit card payment has already been batched by the Simphony system.

Reprinting Closed Checks

Simphony does not have a function key for reprinting a closed check. Instead, users create a macro that includes the steps of adjusting, and then using a "print" service total key.

Privileges

An operator has access to the Adjust function keys only when associated with an Employee Role with the proper privileges:

- Authorize/Perform Adjust Closed Check
- Auth/Perform Adjust Closed Check from Previous Business Days

A Revenue Center Parameters option (#16 in Posting and Control) relates to Adjusting Checks:

- Allow Overtender of Closed Checks

Applying discounts using condiments

You can apply manual, automatic, and coupon discounts to a check when a condiment item is present on the check. A workstation operator can manually apply a discount by selecting the condiment item. For example, configure a bagel to be a parent menu item and configure the condiment, such as cream cheese, to trigger a 5% discount. As a result, when the workstation operator enters the customer order for a bagel with cream cheese, the system applies the discount after the workstation operator selects cream cheese.

You must place condiments in trigger menu item groups to have the system apply automatic and coupon discounts.

This topic explains how to:

- Specify the condiment to be the trigger
- Set the discount to apply to the parent menu item, condiment, or both.
- Set up the discount.
- Create a discount button to appear on the workstation page.

Configuring the condiment as the trigger

1. In the EMC, select the enterprise, property, or zone, select **Configuration**, and then select **Menu Item Groups**.
2. Create a menu item group and then double-click it.
3. Click **Add** near the Include area.
4. Enter or select information for the following fields:

Field	Description
Type	Select **4 – By Menu Item**.
Start #	Click in this field, but do not enter a value.
End #	Click in this field, but do not enter a value.
See Items and Select	Click the link and then select the condiment to be the trigger. This condiment then appears in the End # field.

5. Save the changes.

Configuring parent menu item class discounts

1. In the EMC, select the enterprise, property, zone, or revenue center, select **Configuration**, and then select **Menu Item Classes**.
2. Double-click the menu item and select the **Options** tab.
3. Select **[55 – Discounts Apply to Priced Condiments (parent items only)]** to allow both parent and condiment items to receive the discount. Deselect option **[55]** if you want only the parent item to receive the discount.
4. Save the changes.

Configuring the discount

1. In the EMC, select the enterprise, property, or zone, select **Configuration**, and then select **Discounts**.
2. Create the discount and then double-click it.
3. Configure the **General** tab as described in the following table:

Field	Description
Activation Type	Select the type of discount: • 0 – Manual (Manually entered and applied) • 1 – Automatic (Automatically applied, operator cannot enter) • 2 – Coupon (Automatically applied, operator must enter)
Percent	Enter the discount percentage if you want to use a percent discount.
Max Amount	Enter the maximum amount allowed for the discount if you want to use an amount discount.
Enabled	Select this option to make the discount available to the Ops user. (If you configure a temporary discount, you can quickly turn it off.)
Condiment Discountability	Select the discount method for condiment menu items: • 0 – Use MI Class Option (Note that you must also select Menu Item Class option **[55 - Discounts Apply to Priced Condiments (parent items only)]**.) • 1 – Parent Items Only (Selecting this option makes the discount apply only to the parent menu item.) • 2 – Condiment Items Only (Selecting this option makes the discount apply to the trigger condiment and to all condiments associated with the check.) • 3 – Parent and Highlighted Condiment Items (This is available only for manual discounts.) • 4 - Parent and All Condiment Items (Selecting this option makes the discount apply to the parent menu item and to all condiments associated with the check.)
Trigger MI Group	Select the menu item group. This group is the trigger for the discount. When you select **0 – Use Discount Itemizers**, the only options available for the Trigger Condiment Group are **0 – None** and all available condiment groups previously created.
Trigger Condiment Group	Select the trigger condiment group. This field is dimmed when Trigger MI Group is set to 0 – Use Discount Itemizers.
Options	Select **[25 – Discount Combo Meal Group Items]** if you want combo group menu items to be discounted. (Note that you must also select option **[1 – Allow Discounts]** in the Combo Meal Groups module.)

4. On the **Effectivity** tab, select the days on which the system applies the discount.

5. On the **RVC Type** tab, select the revenue centers that can use this discount.
6. On the **Menu Levels** tab and in the Menu Level Configuration group, select all options for Active On Main Levels and Active On Sub Levels.
7. On the **Output** tab, select the following options:
   - Print on Customer Receipt
   - Print on Journal
   - Print on Guest Check
8. Save the changes.

Creating the discount button

1. In the EMC, select the enterprise, property, zone, or revenue center, select **Configuration**, and then select **Page Design**.
2. Create a discount button.
   a. In the Type field, select **Discount**.
   b. In the arrow field, select the discount you created in the previous section.
3. Save the changes.

Applying a condiment discount

You can apply a condiment discount:

- Manually
  1. Add a parent menu item to the guest check.
  2. Add the condiment that is configured to apply a discount.
  3. Select the button that is configured for the manual condiment trigger function. Simphony applies the discount to the guest check.
  4. Close the transaction.
- Automatically
  1. Add a parent menu item to the guest check.
  2. Add the condiment that is configured to apply a discount. Simphony applies the discount.
  3. Close the transaction.
- Using a coupon
  1. Add a parent menu item to the guest check.
  2. Add the condiment that is configured to apply a discount
  3. Select the button that is configured for the coupon condiment trigger function. Simphony applies the discount.
  4. Close the transaction.

Applying fees to menu items

This feature or functionality was introduced in Simphony 2.7 MR3.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Understanding menu item fees
- 2 Configuring menu item fees
  - 2.1 Adding menu item fees to a service charge group
  - 2.2 Assigning a service charge group to a menu item class
  - 2.3 Privileges for voiding fees
  - 2.4 Displaying or hiding menu item fees
- 3 See also

Understanding menu item fees

You can apply one or more menu item service charge fees (for example, a bottle deposit and a recycling fee) combined as a service charge group to a menu item.

When an operator rings a menu item (for example, Diet Coke) associated with a service charge group, the system adds the menu item fees under the service charge group to the check.

Auditors can track the revenue from specific menu item fees, such as a recycling fee.

Configuring menu item fees

Adding menu item fees to a service charge group

1. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Configuration, and then select **Service Charge Groups**.
2. Select the service charge group record, or add a new service charge group using the insert record button.
3. Add or remove service charges to be included with this service charge group.

Assigning a service charge group to a menu item class

1. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Configuration, and then select **Menu Item**

Classes.
2. Select the menu item class record.
3. On the General tab select the Service Charge Group from the drop-down list to apply to the menu item class record.

Privileges for voiding fees

To void fees from a check or to authorize another operator to do the same:

1. In the EMC, select Enterprise, select Configuration, select Roles, and then select the **Operations** tab.
2. Select the **Authorize/Perform Void of Fees** option.

Displaying or hiding menu item fees

To add the **[Display/Hide Menu Item Fees]** function key:

1. In the EMC, select the Configuration tab, and then select **Page Design**.
2. Add the **[Display/Hide Menu Item Fees]** function key.

To show or hide menu item fees:

1. In Ops, toggle the **[Display/Hide Menu Item Fees]** function key.

See also

- Service Charges

Automatic Discounts for Decimal Quantity Menu Items

This feature or functionality was introduced in Simphony 2.5 MR7.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Understanding automatic discounts with decimal quantity menu items
  - 1.1 Percent off
  - 1.2 Amount off
    - 1.2.1 Example 1: Whole number item
    - 1.2.2 Example 2: Decimal number item
    - 1.2.3 Example 3: Decimal number item with condiment
  - 1.3 Amount Substitution
    - 1.3.1 Example 4: Whole number item
    - 1.3.2 Example 5: Decimal number item
    - 1.3.3 Example 6: Decimal number item, more condiments than parent items
- 2 Rules for automatic discounts
- 3 Configuring decimal quantity menu items
- 4 See also

Understanding automatic discounts with decimal quantity menu items

Beginning with Simphony 2.5 MR7, an automatic discount can accept a decimal value and calculates the appropriate discount amount for each type of discount (Percent off, Amount off, and Amount Substitution). In previous versions of Simphony, automatic discounts were not applied to decimal values.

Related Links: Automatic Discounts

Percent off

This type of discount works the same

Amount off

This type of discount is now calculated as a fraction of the sales total. The discount awarded cannot be greater than the Amount Off value.

Example 1: Whole number item

1 Salad: $10.00
Amount Off: $2.00
Award Percent = Amount Off ($2.00) / Item Base Price ($10.00) = .20
Discount = Current Sales Total ($10.00) x Award Percent (.20) = $2.00
(Because the Current Sales Total is greater than or equal to the base price, the customer would receive the Amount Off.)

Example 2: Decimal number item

.5 Salad: $5.00
Amount Off: $2.00
Award Percent = Amount Off ($2.00) / Item Base Price ($10.00) = .20
Discount = Current Sales Total ($5.00) x Award Percent (.20) = $1.00
(When the Current Sales Total is less than the base price, the customer would receive the discount based on the award percent calculation.)

Example 3: Decimal number item with condiment

.5 Salad: $5.00
1 Chicken: $5.00
Current Sales Total = $10.00
Discount = Current Sales Total ($10.00) x Award Percent (.20) = $2.00
(Because the Current Sales Total is greater than or equal to the base price, the customer would receive the Amount Off.)

Amount Substitution

This type of discount is now calculated as a fraction of the sales total. Calculations have not changed with whole numbers. For decimal values, the system will calculate what percent of the parent item the original substitution price was, and apply that percent discount to the new decimal quantity.

Example 4: Whole number item

1 Salad: $10.00
Amount Substitution: $9.00 (discounted $1.00)
Award Percent = Amount Substitution ($9.00) / Item Base Price ($10.00) = .90
Discount = ($10.00) - Amount Substitution ($9.00) = $1.00
(With whole numbers, the customer always pays the Amount Substitution. So, if they order items totaling $100, they will

pay only $9.00.)

Example 5: Decimal number item

.5 Salad: $5.00
Amount Substitution: $9.00 (discounted $1.00 from parent item base price)
Award Percent = Amount Substitution ($9.00) / Item Base Price ($10.00) = .90
Discount = (Current Sales Total – (Current Sales x Award Percent) = $5.00 – ($5.00 x .90) = $5.00 – $4.50 = $.50

Example 6: Decimal number item, more condiments than parent items

Order Number	Items	Price	Award Percent*	Discount Calculation†	Discount Amount	Customer Pays
1	1 Salad	$10.00	($9.00) / ($10.00) = .90	($25.00 – $9.00)	$16.00	$9.00
	1 Chicken	$ 5.00				
	1 Steak	$ 5.00				
	1 Steak‡	$ 5.00				
2	1 Salad	$10.00	($9.00) / ($10.00) = .90	($25.00 – $9.00)	$11.00	$9.00
	1 Chicken	$ 5.00				
	1 Steak	$ 5.00				
3	1 Salad	$10.00	($9.00) / ($10.00) = .90	($17.50 – $9.00)	$8.50	$9.00
	1 Chicken	$ 2.50				
	1 Steak	$ 5.00				
4	.5 Salad	$ 5.00	($9.00) / ($10.00) = .90	($10.00 – $9.00)	$1.00	$9.00
	1 Steak	$ 5.00				

*The Award Percent for Amount Substitution is based on the parent item base price, not the total price of each item plus condiments.
†The Discount Calculation only comes into effect when the menu item plus condiments are less than the base price amount of the parent item.
‡This extra condiment is added to the first menu item.

Rules for automatic discounts

The following automatic discount rules behave the same. (*EMC > Enterprise / Property > Configuration > Discounts > Auto*)

- **[1 - Item Price Substitution]**
- **[2 - Quantity Threshold]**
- **[3 - Total Price Threshold]**
- **[5 - Sales Price]**

The following automatic discount rule now behaves differently. (*EMC > Enterprise / Property > Configuration > Discounts-> Auto*)

- **[4 - Combination Pricing]** - This discount type needs to have part of each item included in the combination in order for the discount to apply. At least 2 of an item must be ordered before a discount can be applied.

Prior to this release, if the parent menu item was a decimal quantity, the system created multiple items and evenly divided the total price between the number of items, improperly distributing the cost. Now, one item is created at full price and a second item is created at the partial price (automatic discount). If condiments were added to a check for a menu item, these condiments were all added to the first item in the Check Detail list. This has been changed so that as condiments (including those with decimal values) are ordered, they are distributed between multiple menu items. The condiments add in whole number increments to each applicable menu item in the list until there is less than one condiment left. The last decimal count condiment has that decimal count added to the next parent item.

If condiments are excluded from a discount in *EMC > Enterprise / Zone / Property > Configuration > Menu Item Groups*, the excluded condiment values are added together and then subtracted from the discountable total.

Configuring decimal quantity menu items

Follow these steps to add a decimal quantity menu Item to a check:

1. Navigate to *Enterprise / Property / Revenue Center > Configuration > Menu Item Classes > General*.
    - Change the Count Entry to **[2 - Decimal/fraction allowed, round sales count up]**.
2. Navigate to *Enterprise / Property / Revenue Center > Configuration > Menu Item Classes > Options*.
    - Select option **[20 - Allow decimal quantity when ordering]**.

See also

Discounts	Discount · Manual Discount · Automatic Discount · Automatic Coupon Discount · **Automatic Discounts for Decimal Quantity Menu Items** · Combination Pricing Discount · Item Price Substitution Discount · Quantity Threshold Discount · Sales Price Discount · Total Price Threshold Discount · Discount Engine · Discount Exclusivity · Discount NLU · Menu Item Group · Revenue Center Group
Learning series: Discounts	

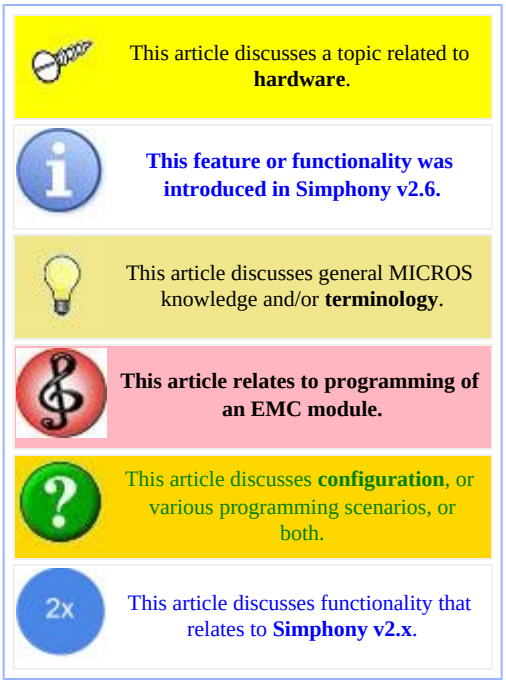
- Simphony 2.5 Maintenance Release 7

Backup KDS Controller

This article discusses the usage and configuration of the Backup KDS Controller feature.

Contents

- 1 Overview
  - 1.1 EMC Configuration
    - 1.1.1 Role
    - 1.1.2 Page Design
- 2 Usage
  - 2.1 To assign an EMC | Backup Service Host for a KDS Controller
  - 2.2 To enable the backup KDS Controller to take over as a KDS Controller automatically when the Primary KDS Controller is down
  - 2.3 To activate the Backup KDS or restore the Primary KDS via the Workstation
    - 2.3.1 To create the Activate Backup KDS button
    - 2.3.2 To create the Restore Primary KDS button
- 3 See also



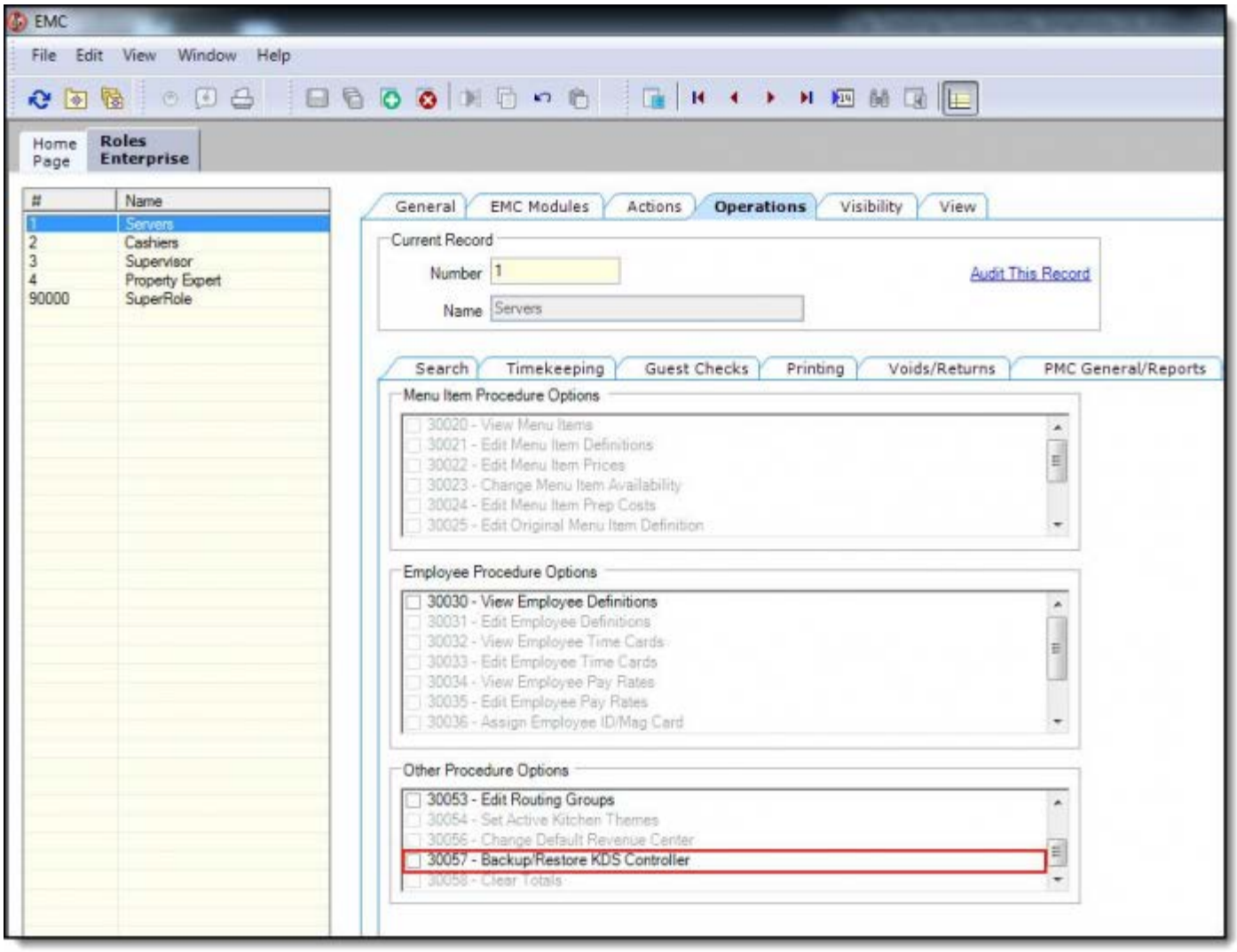
Overview

Support for a Backup KDS Controller has been introduced. A Backup KDS Controller service can be configured to take over manually or automatically from the Primary KDS Controller.

EMC Configuration

Role

A new role privilege can be



configured by navigating to the *EMC-> Enterprise level-> Configuration-> Personnel-> Roles-> Operations tab-> PMC Procedures tab->* ***Other Procedure Options***-> option **[30057 – Backup/Restore KDS Controller]**.

The Context Sensitive Help (CSH) text for option **[30057 – Backup/Restore KDS Controller]** reads as follows:

> *Enable this option for Employees associated with this Role to Activate Backup KDS Controller or Restore Primary KDS Controller.*

Page Design

Navigation: EMC-> <Enterprise / Property / Revenue Center level >-> Configuration-> User Interface-> Content-> Page Design

Activate Backup KDS

> *This function is used to activate the backup KDS Controller that the current Revenue Center is using, if one is configured.*

Restore Primary KDS

> *This function is used to restore the primary KDS Controller that the current Revenue Center is using to be active, if*

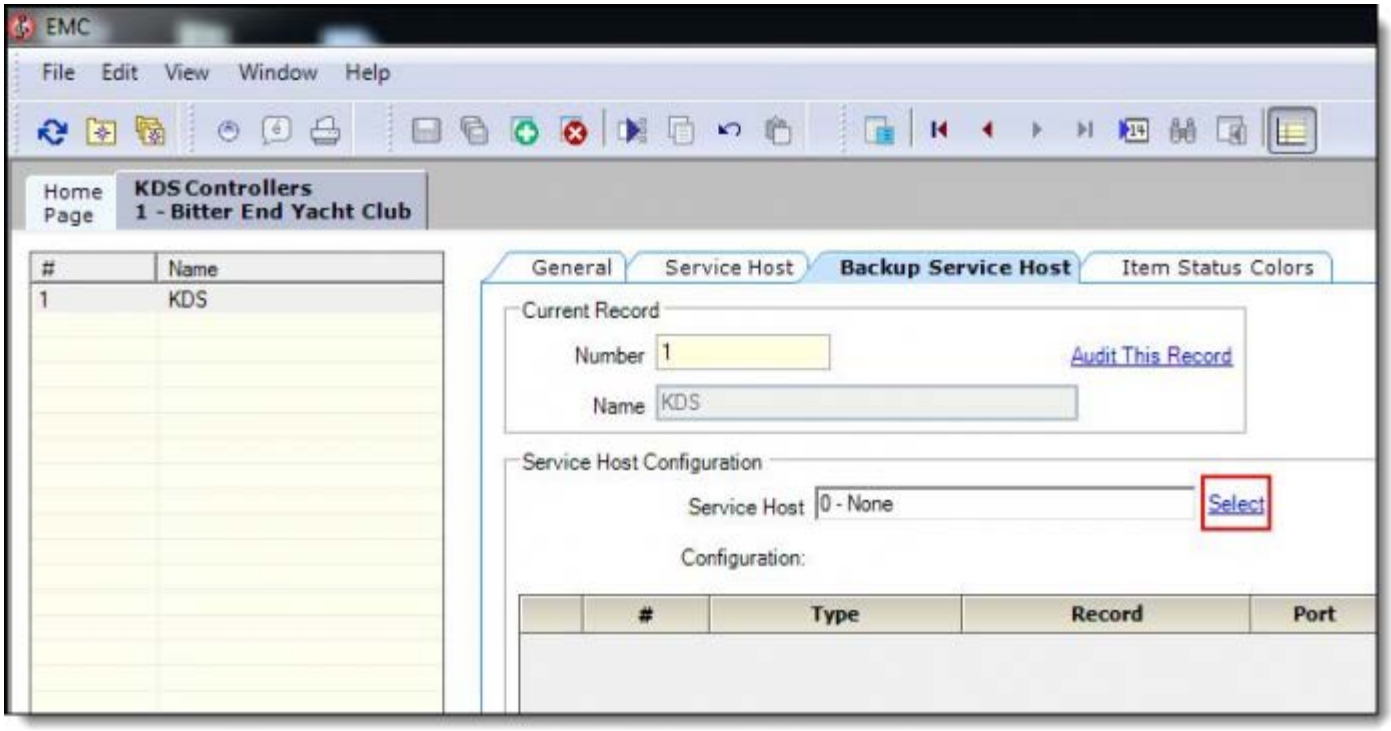
the backup KDS Controller is currently active.

Usage

To assign an EMC | Backup Service Host for a KDS Controller

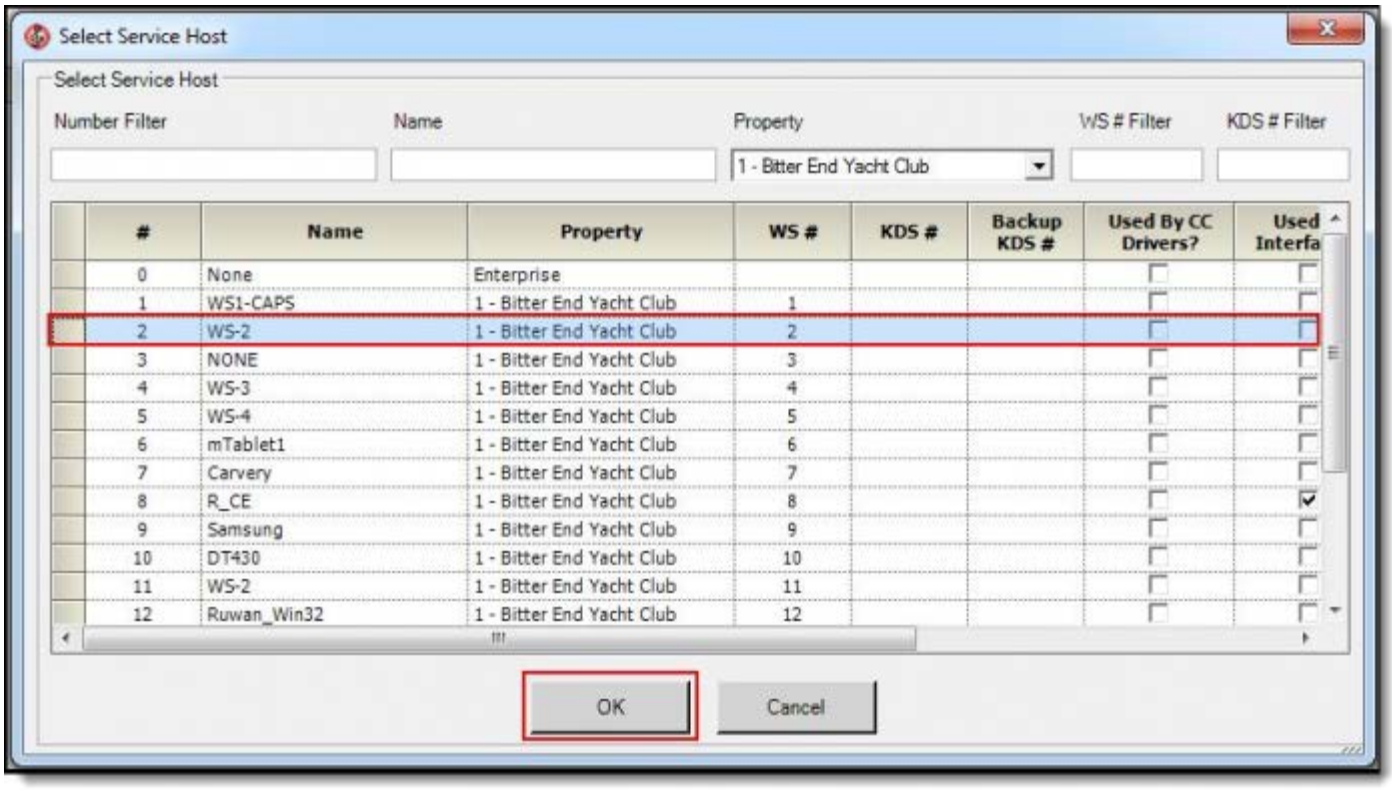
The EMC will allow a backup Service Host to be assigned to a KDS Controller.

1. Navigate to the *EMC-> Property level-> Setup-> Hardware/Interfaces-> KDS-> KDS Controllers-> **Backup Service Host tab***. Select the record and form view.



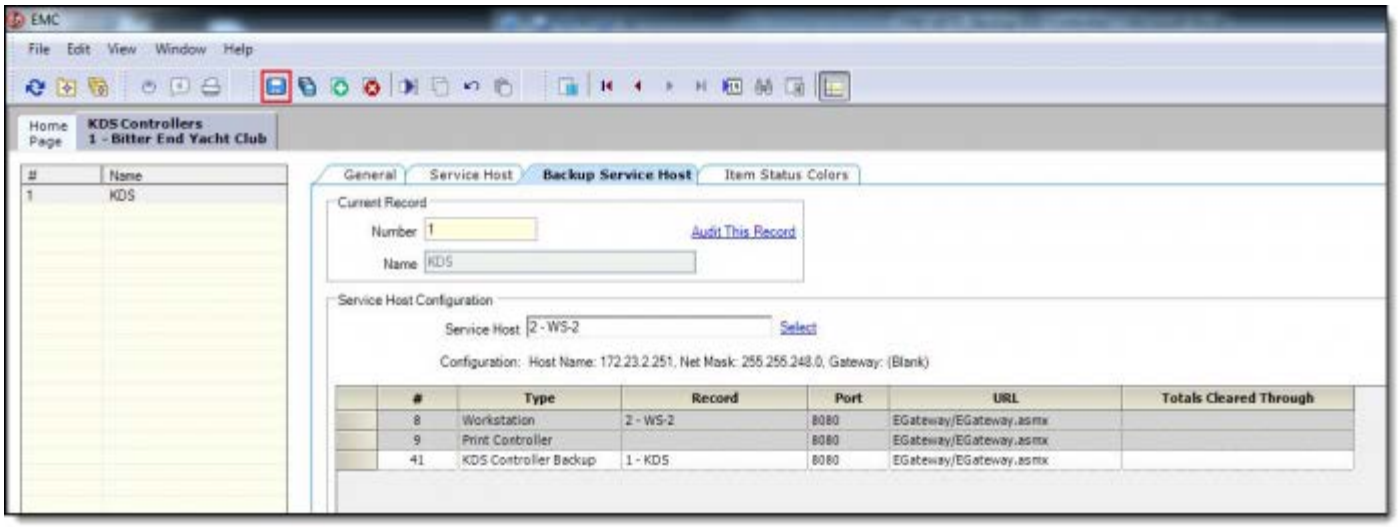
2. Select the new **Backup Service Host** tab then click the **Select** link to the right of the **Service Host** field in the Service Host Configuration section.

3.



Select a Service Host and click **OK**.

4.



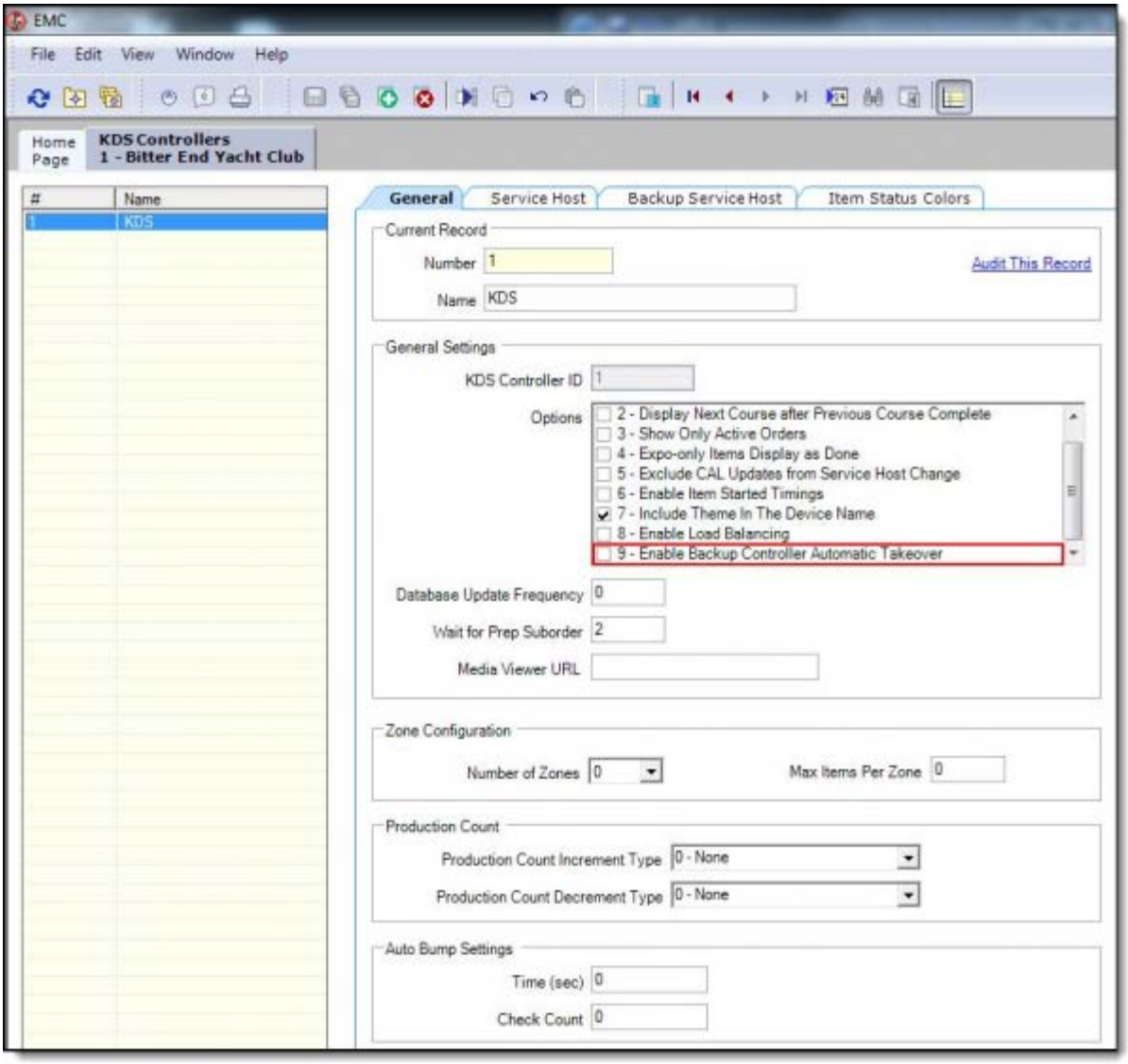
Click **Save**.

The EMC | Backup Service Host ***cannot*** be assigned for a KDS Controller if it is already a KDS Controller.

To enable the backup KDS Controller to take over as a KDS Controller automatically when the Primary KDS Controller is down

When KDS Controller option **[9- Enable Backup Controller Automatic Takeover]** is enabled, the programmed backup KDS Controller will take over as the KDS Controller automatically with no user intervention necessary.

- Navigate to the *EMC-> Property level-> Setup->*



Hardware/Interfaces-> KDS-> KDS Controllers-> ***General tab***-> and enable option **[9- Enable Backup Controller Automatic Takeover]**.

The CSH text for option **[9- Enable Backup Controller Automatic Takeover]** reads as follows:

> *If there is Backup Service Host configured for this KDS Controller, by default the backup KDS Controller can only be activated manually. Enable this option bit to allow the backup KDS Controller to takeover automatically when the primary controller is down. [The Activate Backup KDS function must be used to take over manually].*

To activate the Backup KDS or restore the Primary KDS via the Workstation

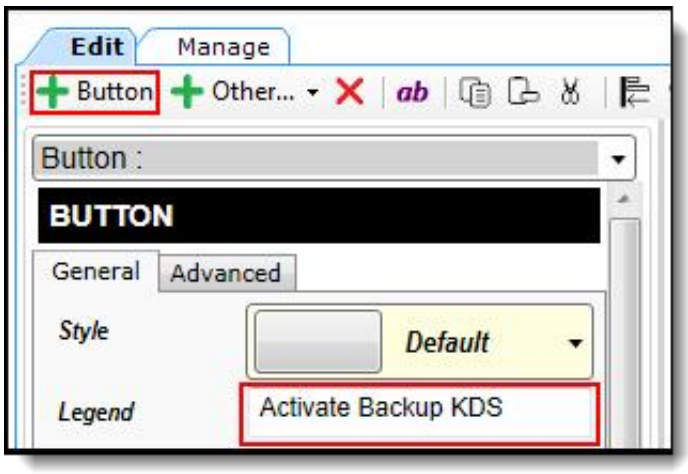
There are two new functional buttons that must be created to do the following:

- Activate Backup KDS
- Restore Primary KDS

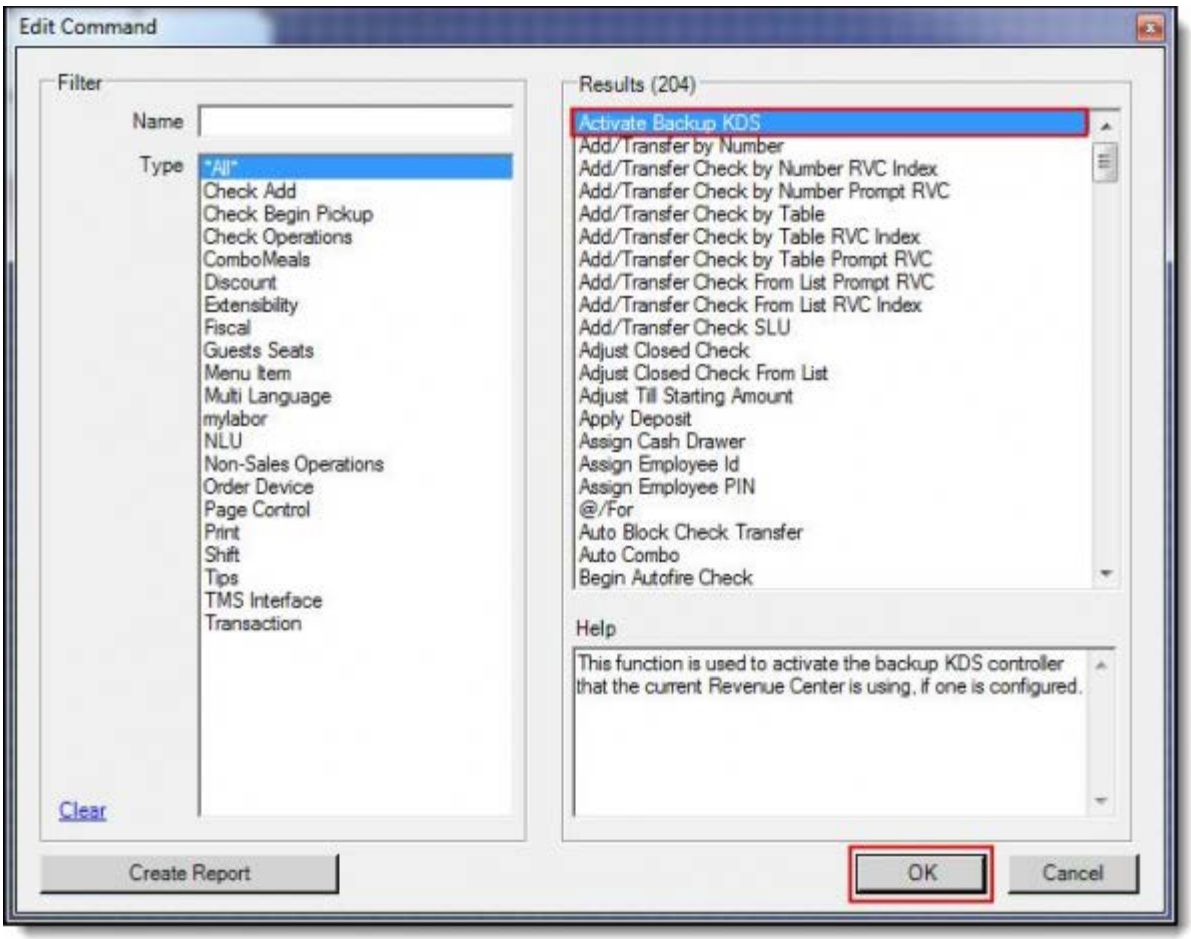
To create the Activate Backup KDS button

1. Navigate to the *EMC-> <Enterprise / Property / Revenue Center level >-> Configuration-> User Interface-> Content-> Page Design-> **Edit tab***.

2. Click the **Add** Button key and enter “Activate Backup KDS” in the **Legend** field.

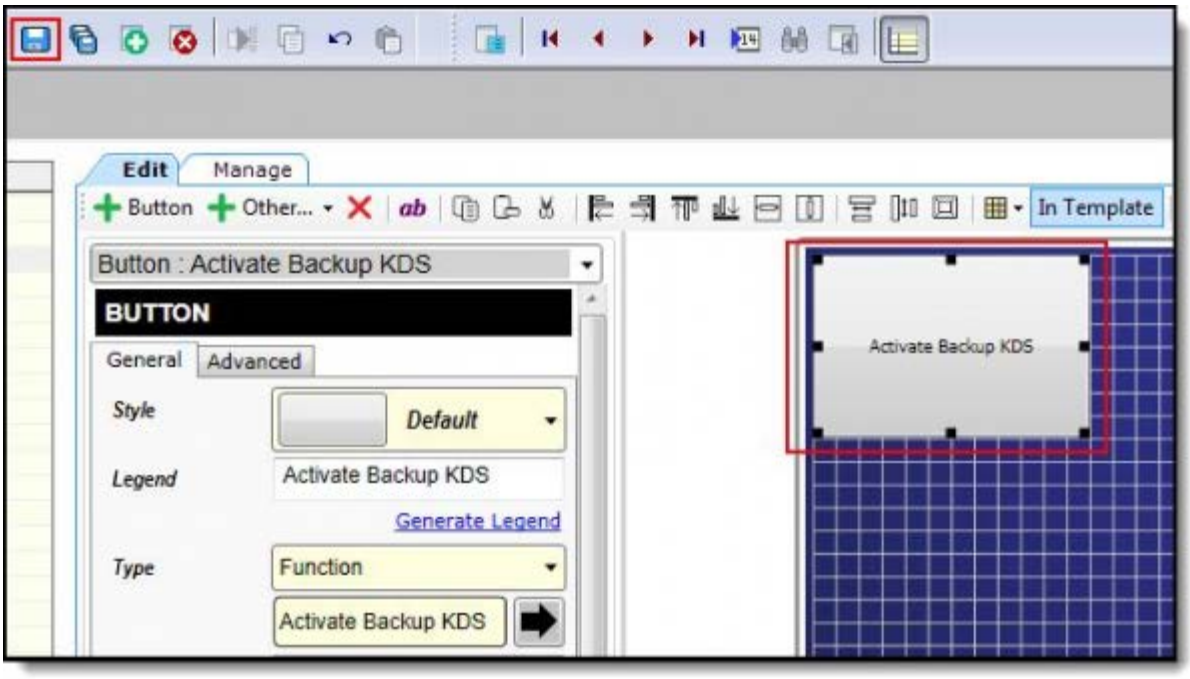


3. Click the **Function Arrow** key, select **Activate Backup KDS** from the list of functions and click **OK**.



4. The **Activate Backup KDS** button is created.

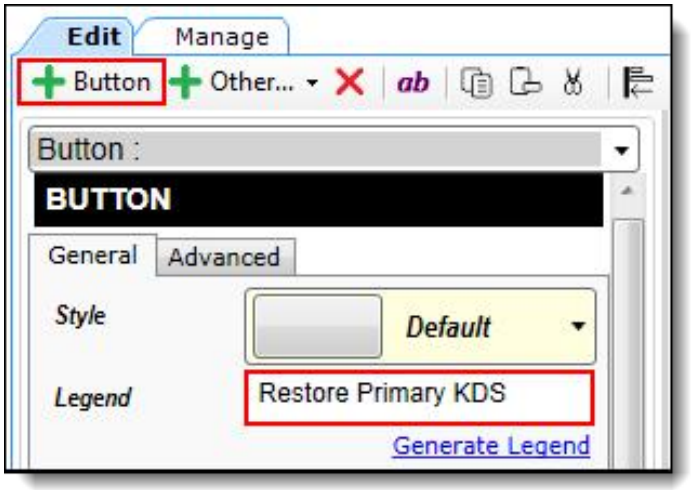
Click **Save**.



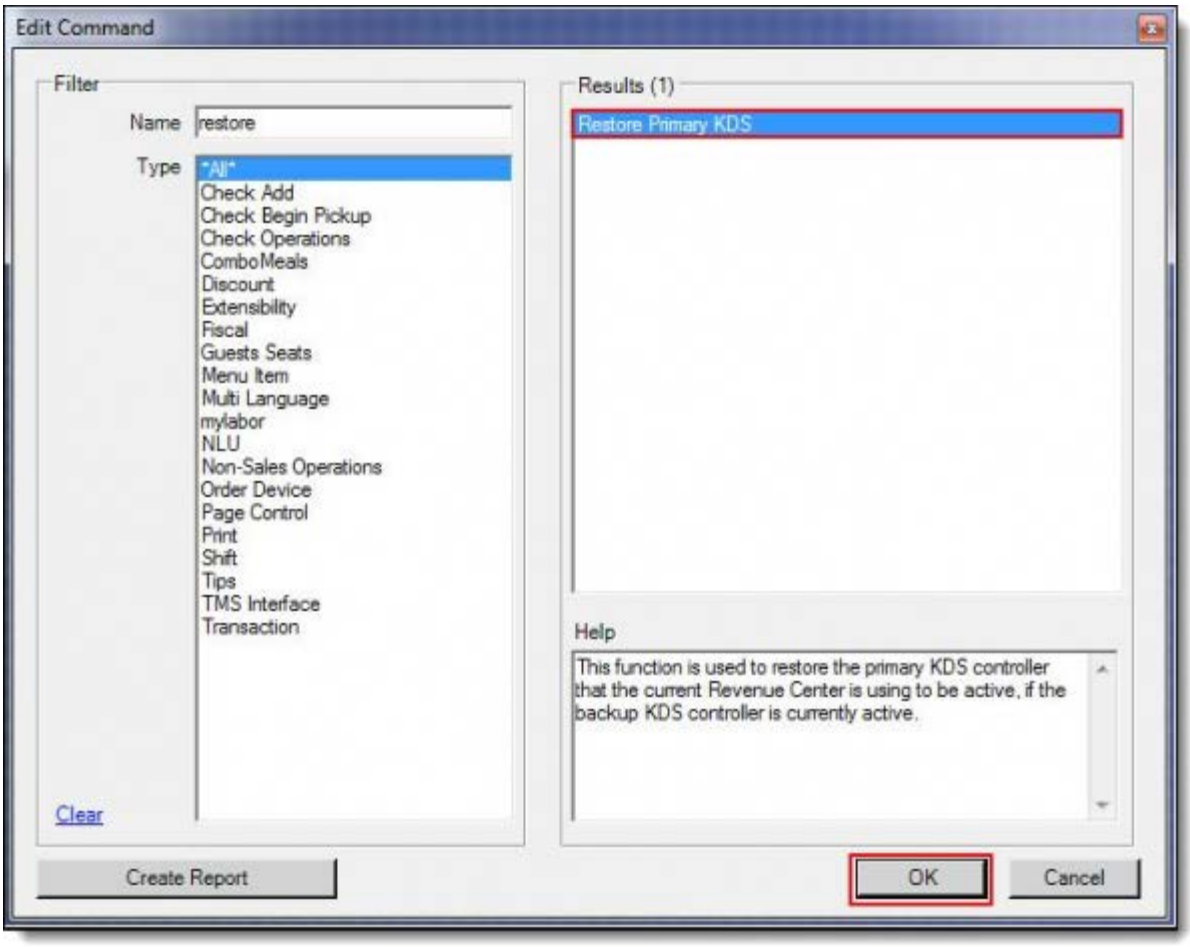
To create the Restore Primary KDS button

1. Navigate to the *EMC-> <Enterprise / Property / Revenue Center level >-> Configuration-> User Interface-> Content-> Page Design-> **Edit tab***.

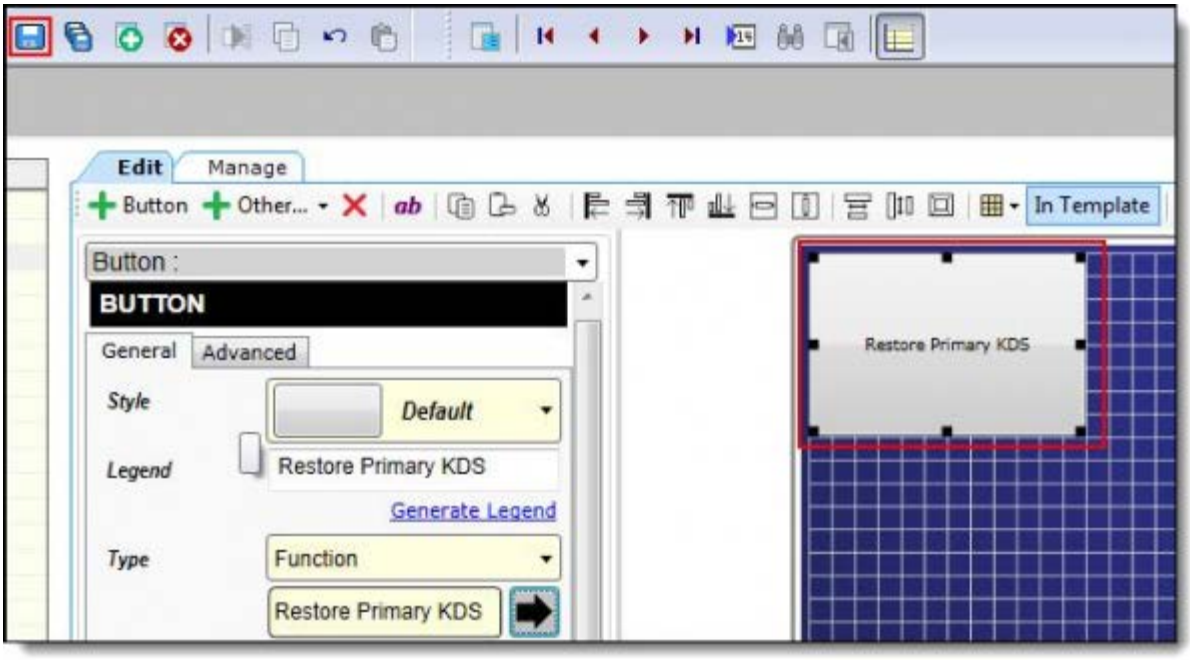
2. Click the **Add** Button key and enter “Restore Primary KDS" in the **Legend** field.



3. Click the **Function Arrow** key, select **Restore Primary KDS** from the list of functions and click **OK**.



4. The **Restore Primary KDS** button is created. Click **Save**.



See also

- Simphony 2.6

Banquet Guest Check Printing

This article discusses the usage and configuration of the Banquet Guest Check Printing feature.

Contents

- 1 Overview
  - 1.1 EMC Configuration
    - 1.1.1 Roles
    - 1.1.2 To configure the role option to begin Banquet Check By Prompt
    - 1.1.3 To configure the role option to edit Banquet Check By Prompt
    - 1.1.4 To configure the prompt for authorization to create a Banquet Check
    - 1.1.5 To configure the prompt for authorization to edit a Banquet Check:
    - 1.1.6 To configure Begin Banquet Check
      - 1.1.6.1 Configurable Prompt Type
      - 1.1.6.2 NonConfigurable Prompt Type
    - 1.1.7 To configure a Banquet Check Add/Transfer by Number
    - 1.1.8 To configure a Banquet Check Split
    - 1.1.9 To configure RVC table names as room names
    - 1.1.10 To configure a custom page printer
    - 1.1.11 To configure a Tender Media Deposit
    - 1.1.12 To configure a Tender Media Printing
    - 1.1.13 To configure page margins for Banquet Guest Check Printing
  - 1.2 Usage
    - 1.2.1 To Begin the Banquet Check
    - 1.2.2 To use Banquet Check Serving Period
  - 1.3 Verification
    - 1.3.1 To verify if a Banquet Check Print is increasing the internal check print count
    - 1.3.2 EMC Configuration
    - 1.3.3 Ops Steps
- 2 See also

This feature or functionality was introduced in Simphony v2.6.

This article discusses general MICROS knowledge and/or **terminology**.

This article relates to programming of an EMC module.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

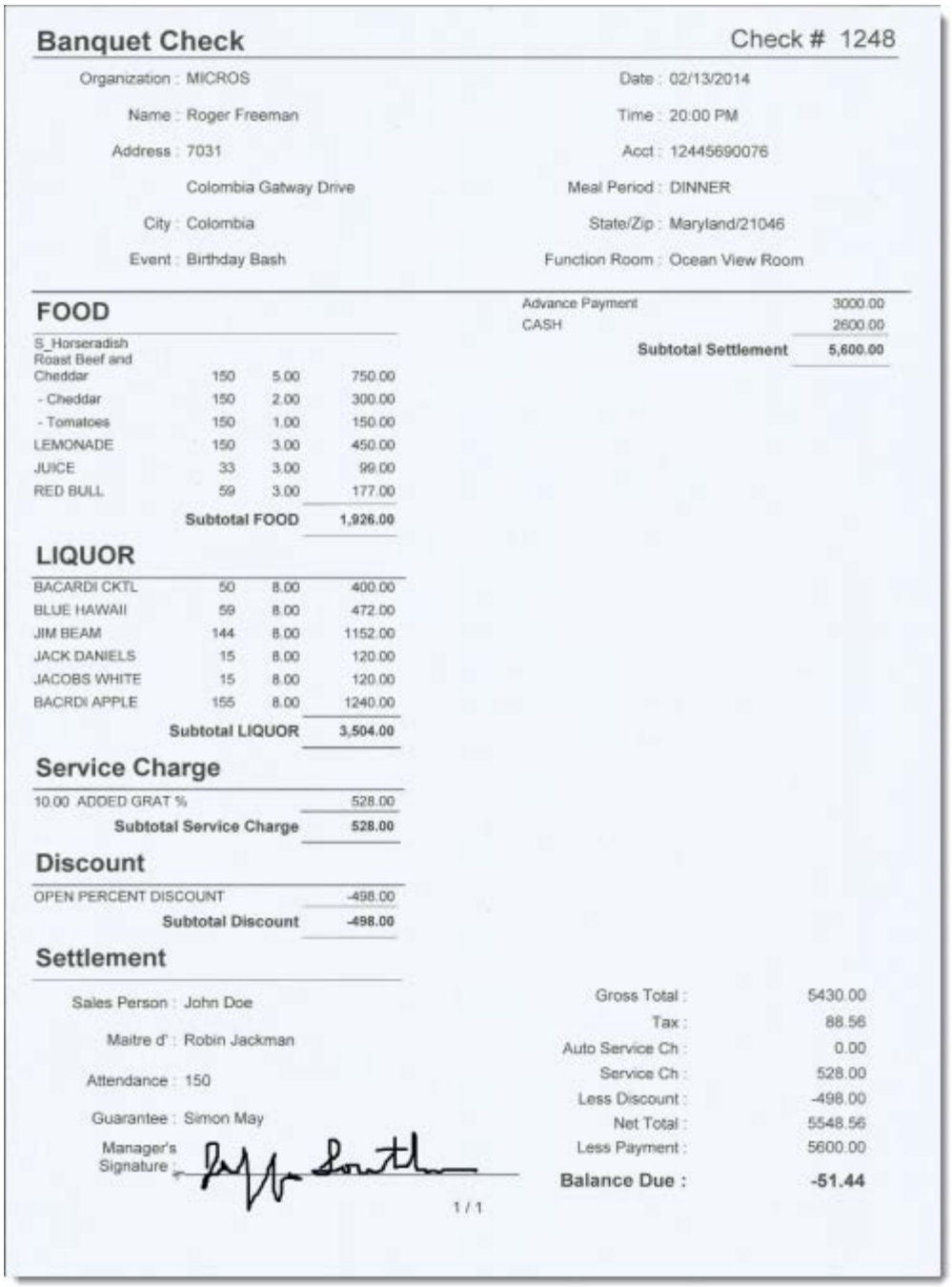
This article discusses functionality that relates to **Simphony v2.x**.

Overview

The Banquet Guest Check is used to present a specially formatted Guest Check to the guest. Even though it can be used anywhere, the Banquet Guest Check is intended for use in a Banquet environment. In this environment, there are

additional components of information that are reflected in the Guest Check (i.e., event name, address and contact information, name of the function room the event was held, name of the maitre'd and catering sales manager, serving period, etc.).

One format of the Banquet Guest Check is available, utilizing an 8.5 x 11 page output and prints on a custom page printer.



Banquet Check Check # 1248

Organization : MICROS
Name : Roger Freeman
Address : 7031 Colombia Gatway Drive
City : Colombia
Event : Birthday Bash

Date : 02/13/2014
Time : 20:00 PM
Acct : 12445690076
Meal Period : DINNER
State/Zip : Maryland/21046
Function Room : Ocean View Room

FOOD

S_Horseradish Roast Beef and Cheddar	150	5.00	750.00
- Cheddar	150	2.00	300.00
- Tomatoes	150	1.00	150.00
LEMONADE	150	3.00	450.00
JUICE	33	3.00	99.00
RED BULL	59	3.00	177.00
Subtotal FOOD			**1,926.00**

LIQUOR

BACARDI CKTL	50	8.00	400.00
BLUE HAWAII	59	8.00	472.00
JIM BEAM	144	8.00	1152.00
JACK DANIELS	15	8.00	120.00
JACOBS WHITE	15	8.00	120.00
BACRDI APPLE	155	8.00	1240.00
Subtotal LIQUOR			**3,504.00**

Service Charge

10.00 ADDED GRAT %	528.00
Subtotal Service Charge	**528.00**

Discount

OPEN PERCENT DISCOUNT	-498.00
Subtotal Discount	**-498.00**

Settlement

Sales Person : John Doe
Maitre d' : Robin Jackman
Attendance : 150
Guarantee : Simon May
Manager's Signature :

Advance Payment	3000.00
CASH	2600.00
Subtotal Settlement	**5,600.00**

Gross Total :	5430.00
Tax :	88.56
Auto Service Ch :	0.00
Service Ch :	528.00
Less Discount :	-498.00
Net Total :	5548.56
Less Payment :	5600.00
Balance Due :	**-51.44**

1 / 1

EMC Configuration

Roles

Operators must be given the correct Role privileges to be allowed to configure Banquet Guest Check Printing functionality. The following Banquet Guest Check Printing options have been added to the Roles module in the EMC. The updated Context Sensitive Help (CSH) text reads as follows:

199 - Begin Check By Prompt

Select this option to allow Employees associated with this Role to begin check by prompt. This option bit is a part of Banquet Check Printing Process.

200 - Edit Check By Prompt

Select this option to allow Employees associated with this Role to edit check by prompt. This option bit is a part of Banquet Check Printing Process.

To configure the role option to begin Banquet Check By Prompt

Prerequisite: The operator has already configured a **Begin Check By Prompt** button.

1. Navigate to the *EMC-> Enterprise level-> Configuration-> Personnel-> Roles-> Operations-> Guest Checks->* ***Add/Transfer/Pickup Options***
2. Enable **[199- Begin Check By Prompt]**
3. Sign onto an Ops client.
4. Click on **Begin Check By Prompt**.

The CSH for **[199- Begin Check By Prompt]** reads as follows:

Select this option to allow Employees associated with this Role to begin check by prompt. This option bit is a part of Banquet Check Printing Process.

To configure the role option to edit Banquet Check By Prompt

Prerequisite: The operator has already configured a **Begin Check By Prompt** button.

1. Navigate to the *EMC-> Enterprise level-> Configuration-> Personnel-> Roles-> Operations-> Guest Checks->* ***Check Editing Options***
2. Enable **[200- Edit Check By Prompt]**
3. Sign onto an Ops client
4. Open a Banquet Check from the Check List
5. Select a header and click **Edit Prompt**

The CSH for **[200- Edit Check By Prompt]** reads as follows:

Select this option to allow Employees associated with this Role to edit check by prompt. This option bit is a part of Banquet Check Printing Process.

To configure the prompt for authorization to create a Banquet Check

Prerequisite: The operator has already configured a **Begin Check By Prompt** button.

1. Navigate to the *EMC-> Enterprise level-> Configuration-> Personnel-> Roles-> Operations-> Guest Checks-> **Add/Transfer/Pickup Options***
2. Disable **[199- Begin Check By Prompt]**
3. Sign onto an Ops client.
4. Click on Begin Check By Prompt.
5. Enter the authorization code of a privileged Employee.

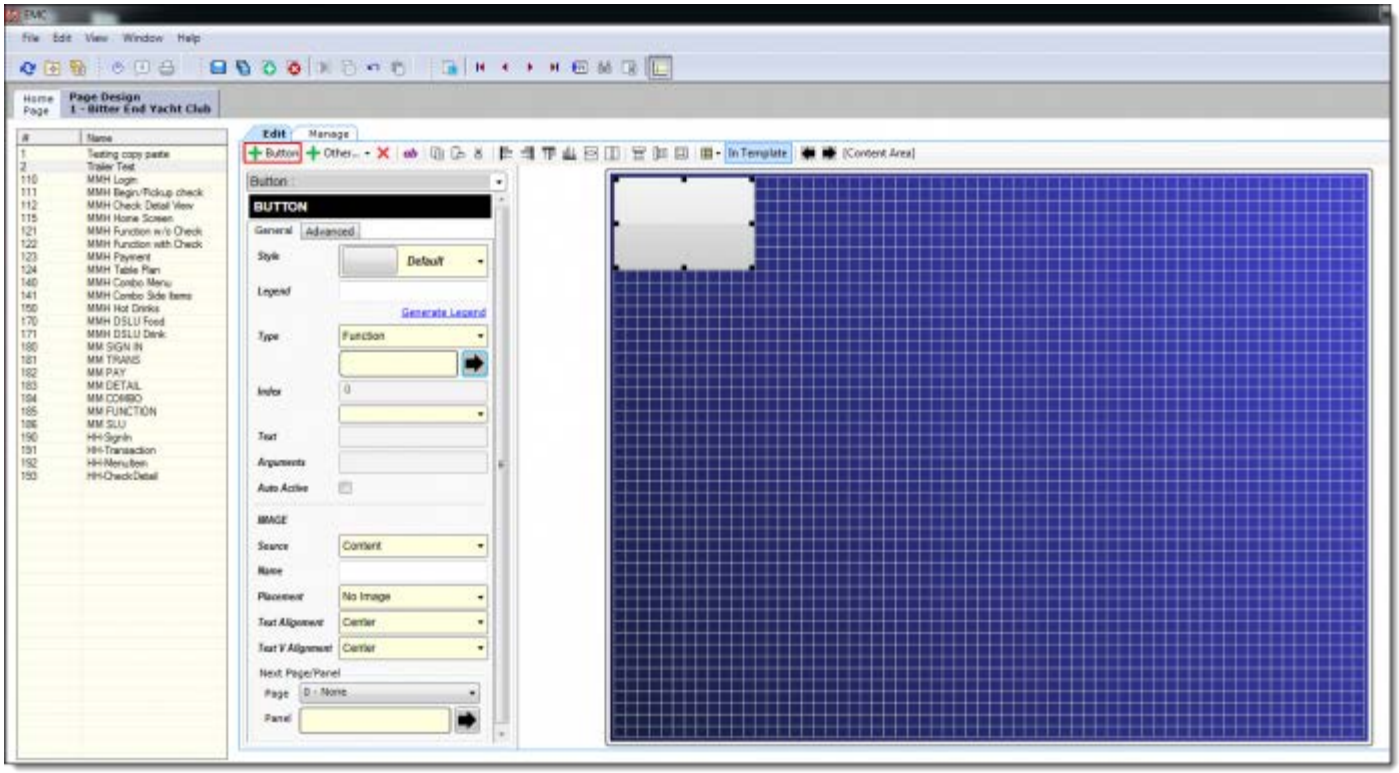
To configure the prompt for authorization to edit a Banquet Check:

Prerequisite: The operator has already configured a **Begin Check By Prompt** button.

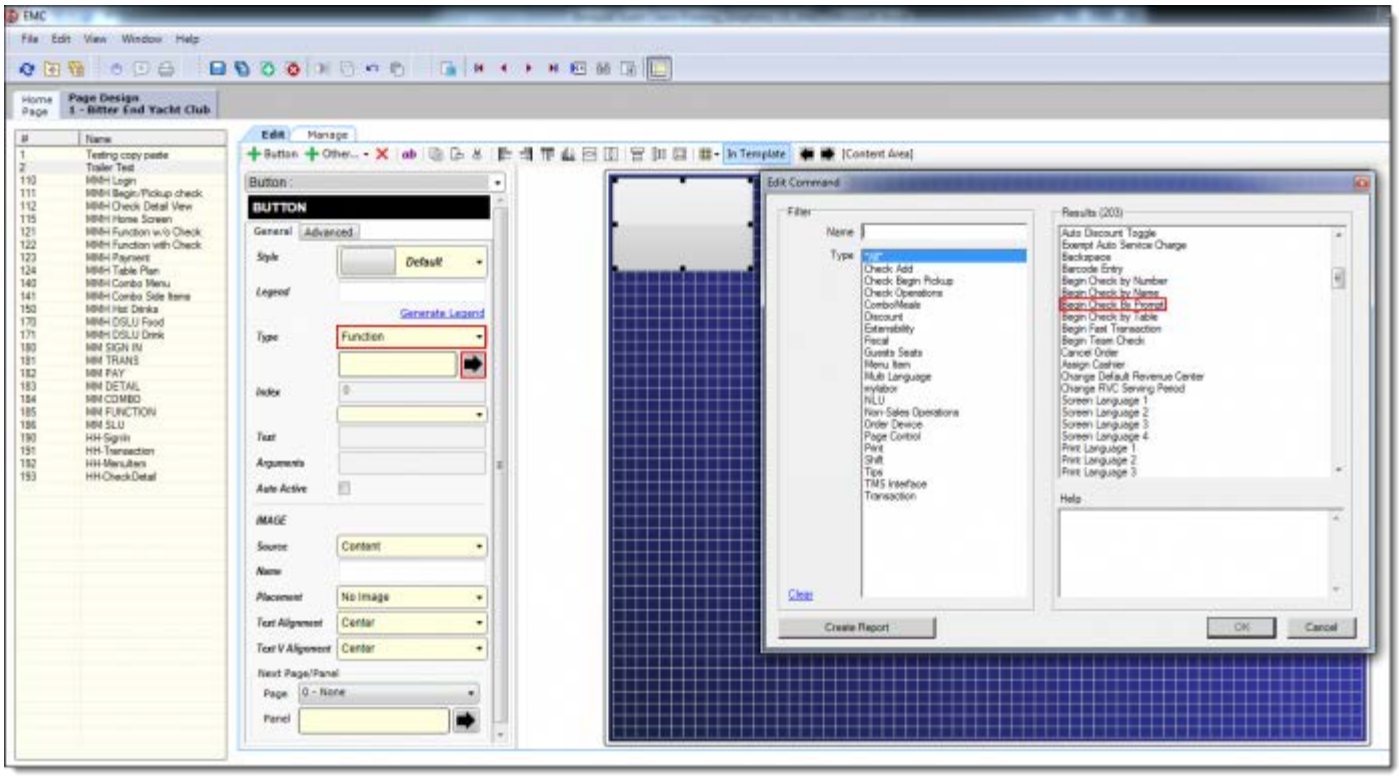
1. Navigate to the *EMC-> Enterprise level-> Configuration-> Personnel-> Roles-> Operations-> Guest Checks-> **Check Editing Options***.
2. Disable **[200- Edit Check By Prompt]**.
3. Sign onto an Ops client.
4. Open a Banquet Check from the Check List.
5. Select a header and click **Edit Prompt**.
6. Enter the authorization code of a privileged Employee.

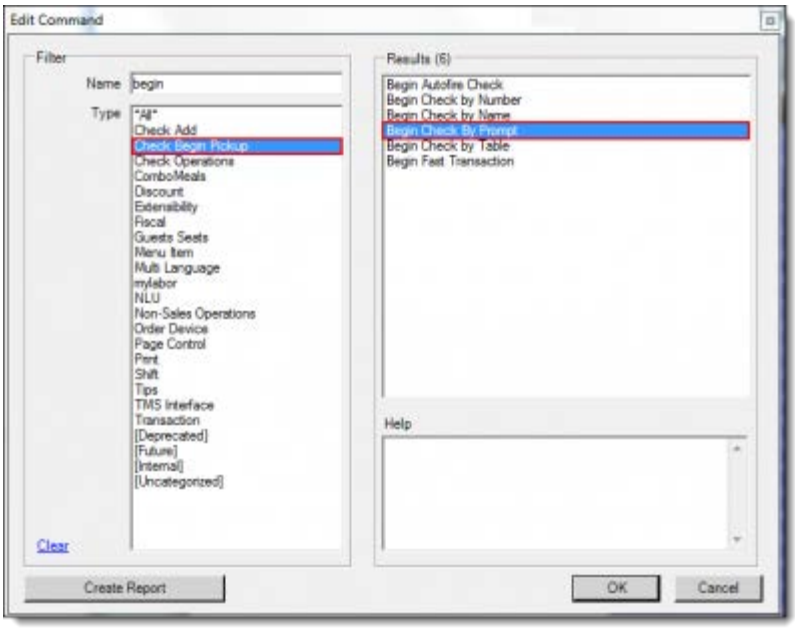
To configure Begin Banquet Check

1. Navigate to the *EMC-> <Enterprise / Property / Revenue Center>-> User Interface-> Content-> **Page Design***.
2. Add a new button.

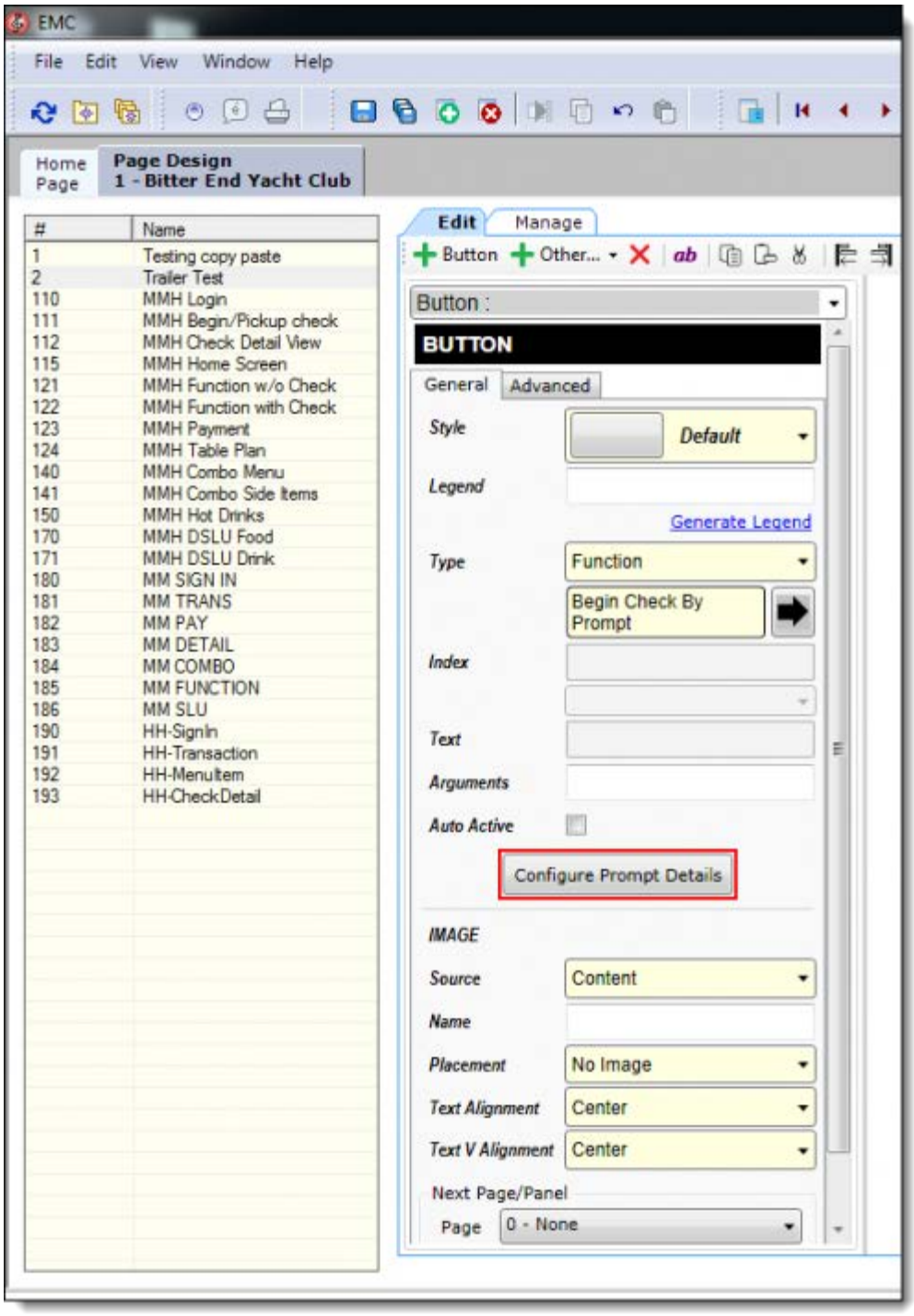


3. Select **Function** as type and select **Begin Check By Prompt**



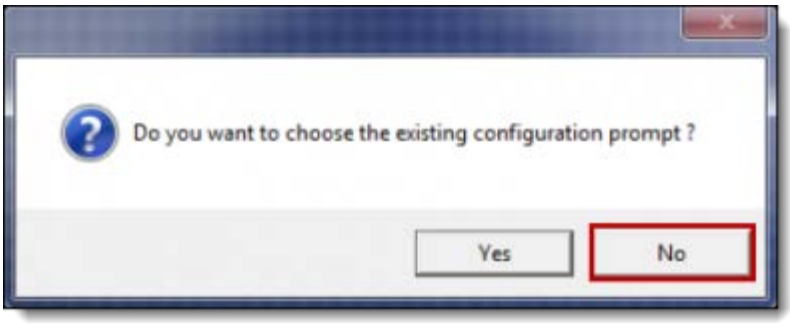


4. Click **Configure Prompt Details**

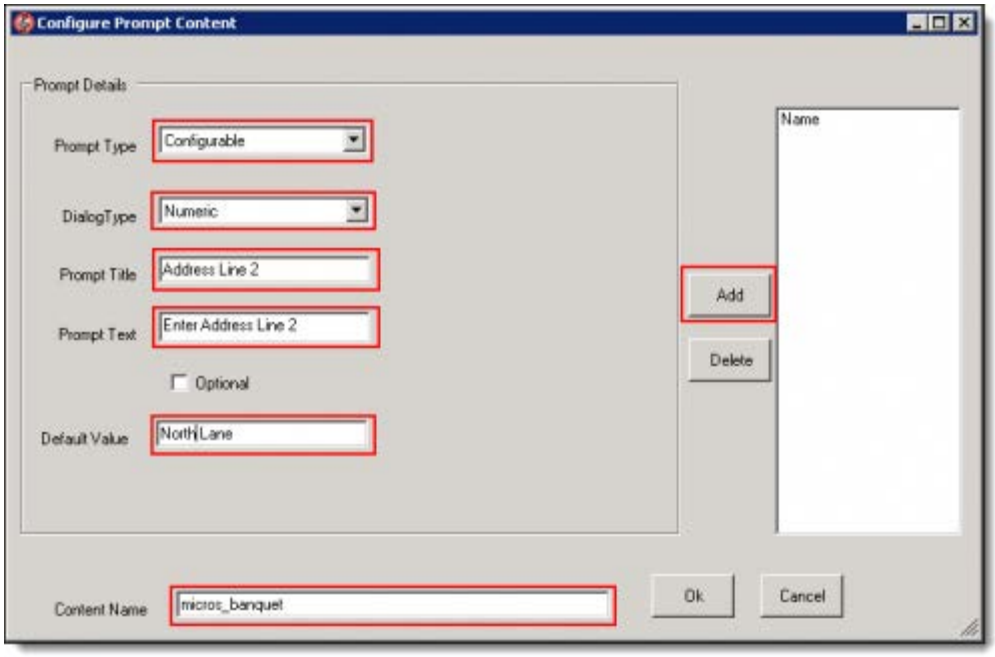


Option 1 – Clicking the 'No' button

1. Click **No** when prompted with **"Do you want to choose the existing configuration prompt?"**

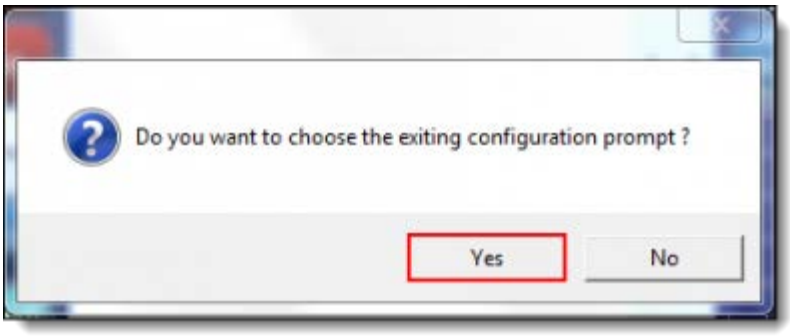


2. Select the prompt type as Configurable. Enter the Prompt Title, Prompt Text, Default Value, and Content Name. Click **Add** and then **OK**.

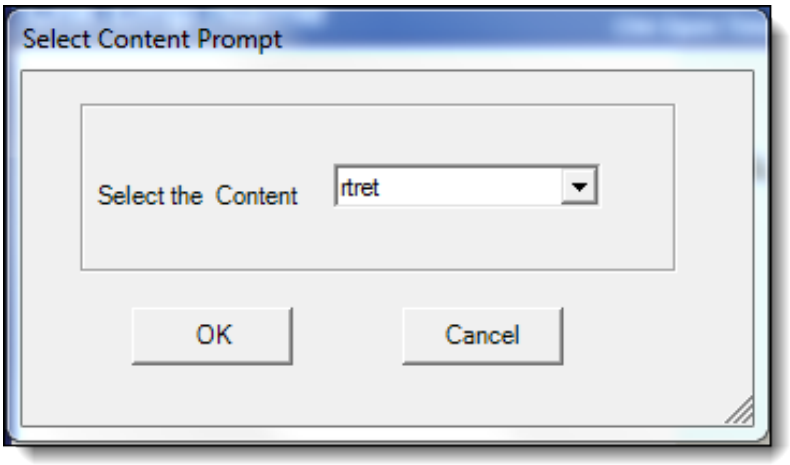


Option 2 – Clicking the 'Yes' button

1. A prompt screen asks to choose the exiting configuration prompt to set or select the prompt content.



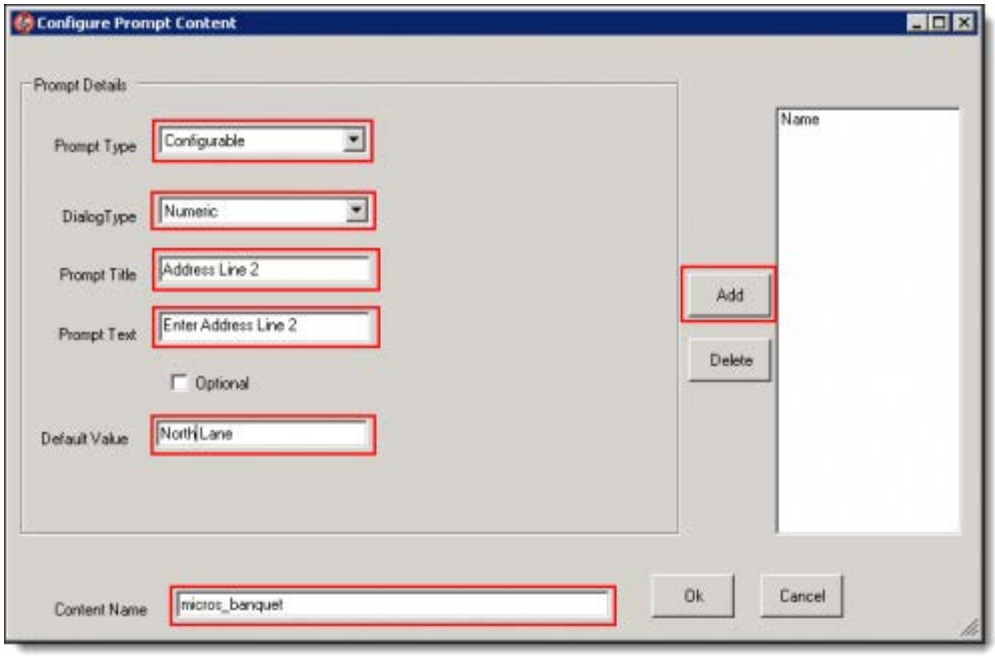
- Selecting **Yes** displays a list of all the existing configuration file names in the content table.



- As mentioned previously, selecting No allows the user to set the prompts and save details in the Content Table. Specify the name of the content.

2. Configure the Prompt Type, Dialog Type, Prompt Title, Prompt Text, Default Value and provide a Content Name. Click **OK**.

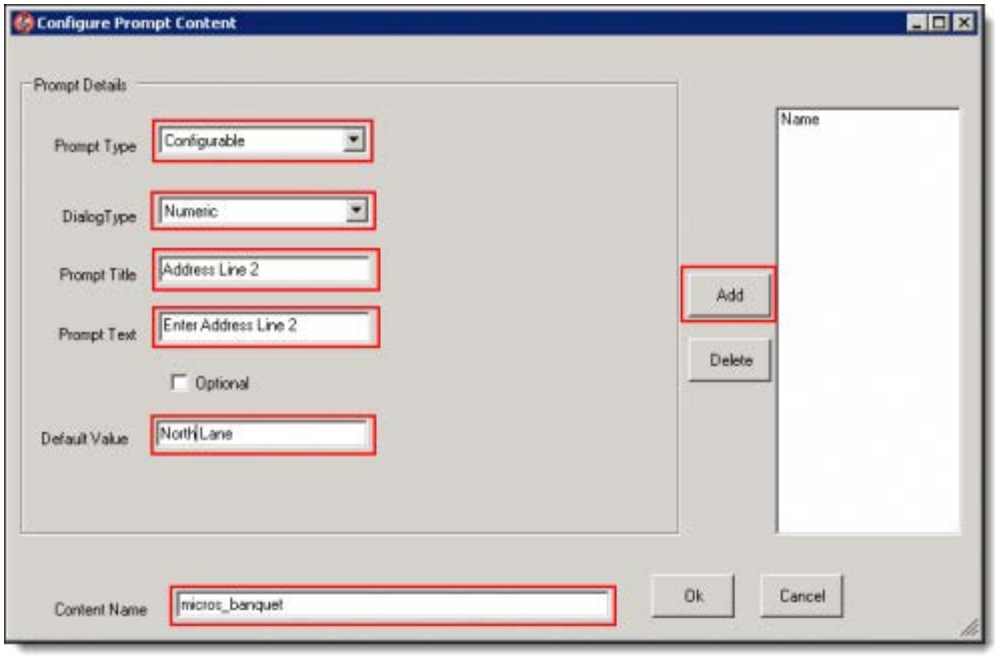
Note: The Optional check box allows the prompt to bypass the next screen and allowing the user to click OK.



- There are a number of options when configuring the Prompt content. Prompt Types can be Configurable or NonConfigurable. Dialog Types include AlphaNumeric, Numeric, and List. Users must select from the following list of Configurable Prompt items that can be used for a Banquet Check:
  - name="lblOrganization" >**Organization**
  - name="lblAcct" >**Acct**
  - name="lblCustName" >**Name**
  - name="lblCustAddress1" >**Address Line 1**
  - name="lblCustAddress2" >**Address Line 2**
  - name="lblCustCity" >**City**
  - name="lblState" >**State**
  - name="lblZip" >**Zip**
  - name="lblDate" >**Date**
  - name="lblTime" >**Time**
  - name="lblEvent" >**Event**
  - name="lblSalesperson" >**Sales Person**
  - name="lblMaitred" >**Maitre D'**
  - name="lblGuarantee" >**Guarantee**

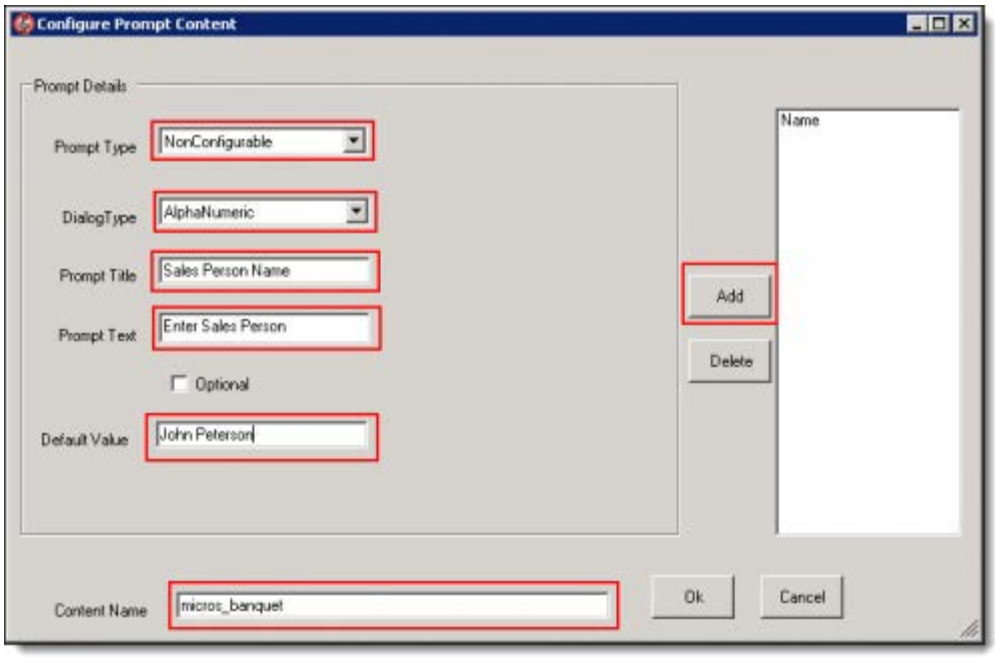
Configurable Prompt Type

The example below illustrates a “Configurable” Prompt Type and a “List” Dialog Type to provide a list of items – in this case, a selection of function rooms.



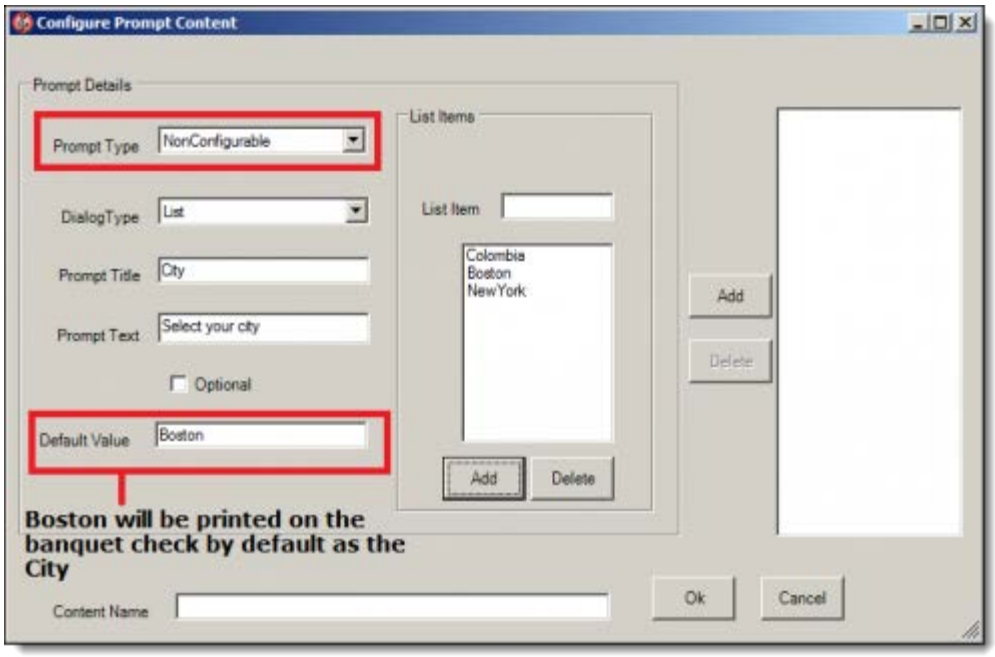
NonConfigurable Prompt Type

NonConfigurable prompts are not prompted to the user when beginning a Banquet Check. Irrespective of the Dialog Type (i.e., Alphanumeric, Numeric, or List), users will not be prompted to enter data.

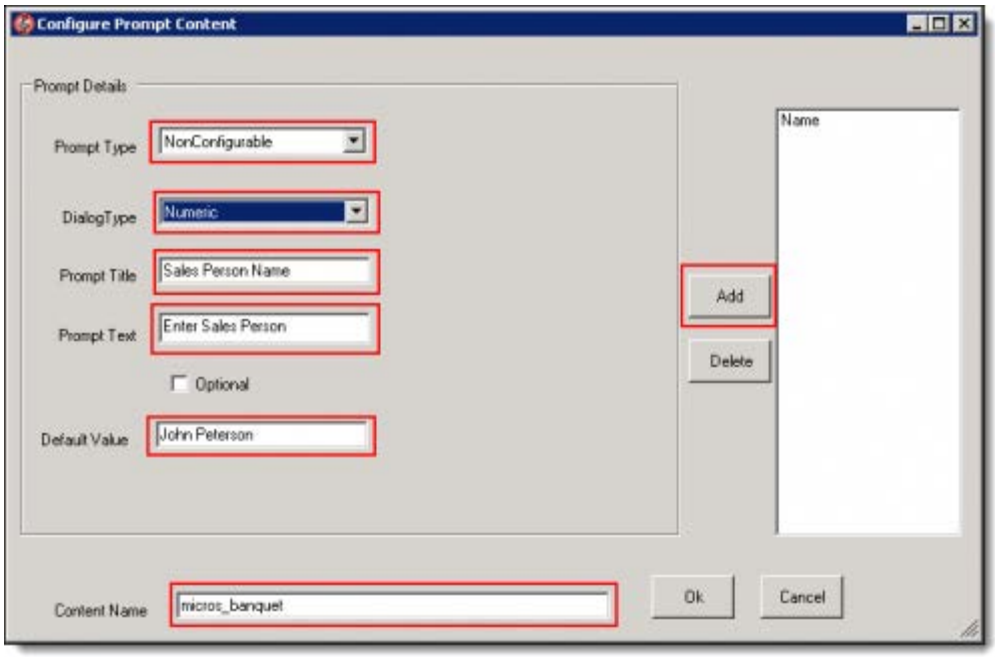


When configuring a NonConfigurable prompt and enter a Default Value, that value will get printed in the Banquet Check by default, without it getting

prompted to the user.

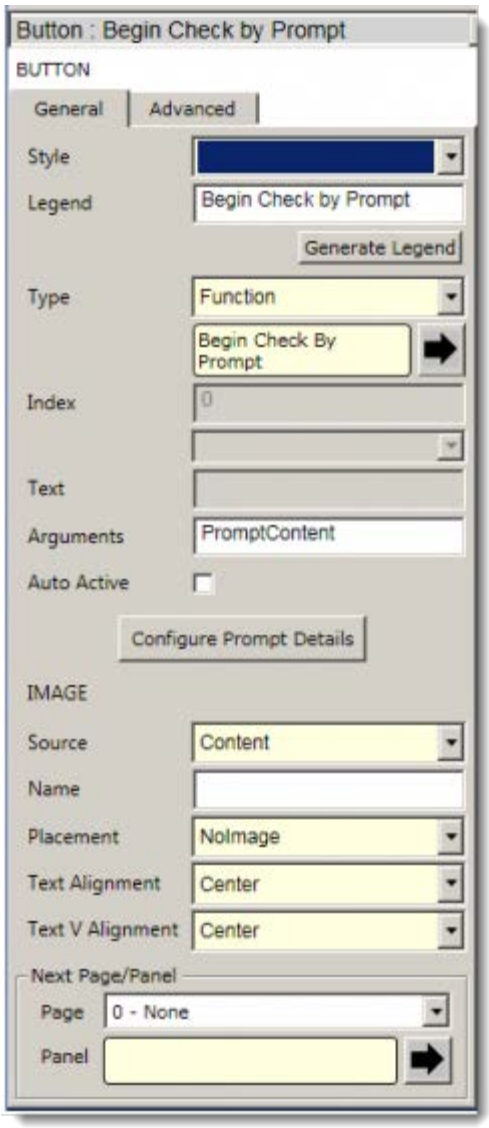


When configuring a NonConfigurable prompt and the user does not provide a default value, nothing will be printed on the banquet check, leaving that entry blank.

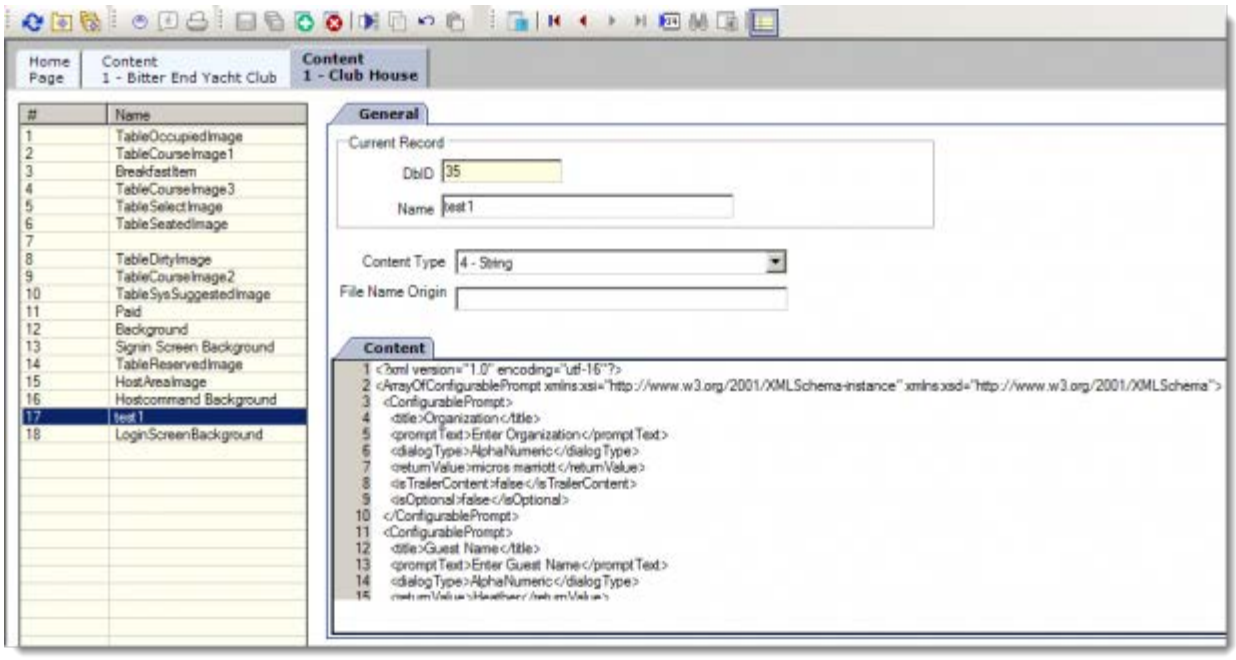


Users will configure NonConfigurable prompts when certain data will not change and remain static in a Banquet Check. For example, if the organization holding the banquet is always the same, then it can be defined as a NonConfigurable prompt.

1. The details and content name added or selected is added as arguments in the button properties panel.



2. The configuration data of prompts saves as an XML file in the Content Table.

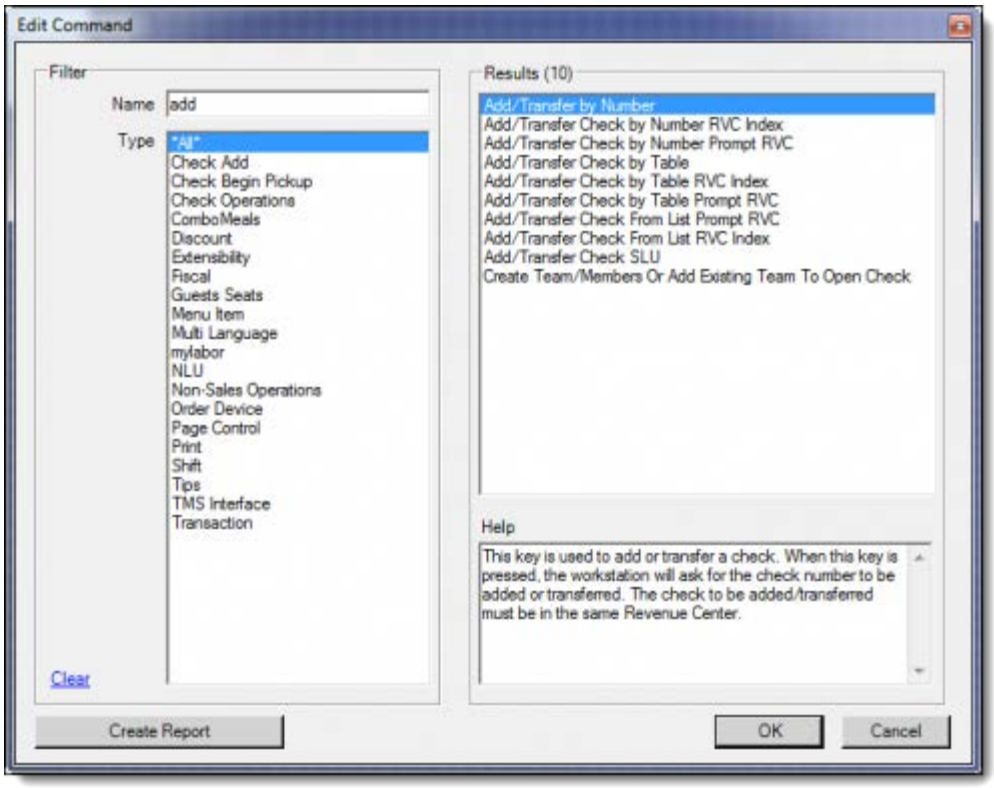


To configure a Banquet Check Add/Transfer by Number

The following steps illustrate how to transfer one banquet check to another.

1. Navigate to the *EMC-> Revenue Center level-> Configuration-> User Interface-> Content->* ***Page Design***.

2. Add a Button, select the Function as "Type" and then select **Add/Transfer by Number**.



3. Sign onto an Ops client.
4. Begin a Banquet Check and ring up menu items. Note the check number and service total.
5. Begin the second Banquet Check and ring menu items. Note the check number and service total.
6. Pickup the first Banquet Check from the Ops Pick Up check list.
7. Click the Add/Transfer by Number button.
8. Enter the second Banquet Check number mentioned in step 5. The first check's prompt data overwrites the second check's prompt data when the checks are merged.
9. Select **OK** in the "Add Check" screen. The second Banquet Check will be transferred to the first one.

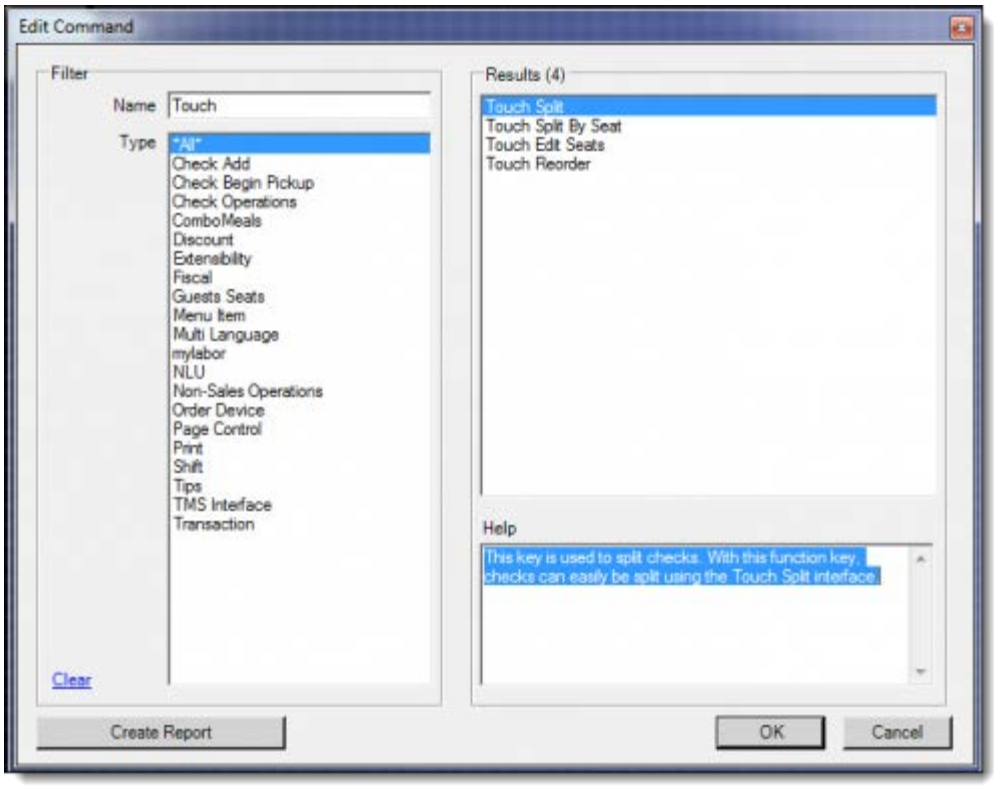
To configure a Banquet Check Split

The following steps illustrate how to split a Banquet Check.

1. Navigate to the *EMC-> Revenue Center level-> Configuration-> User Interface-> Content->* ***Page Design***.

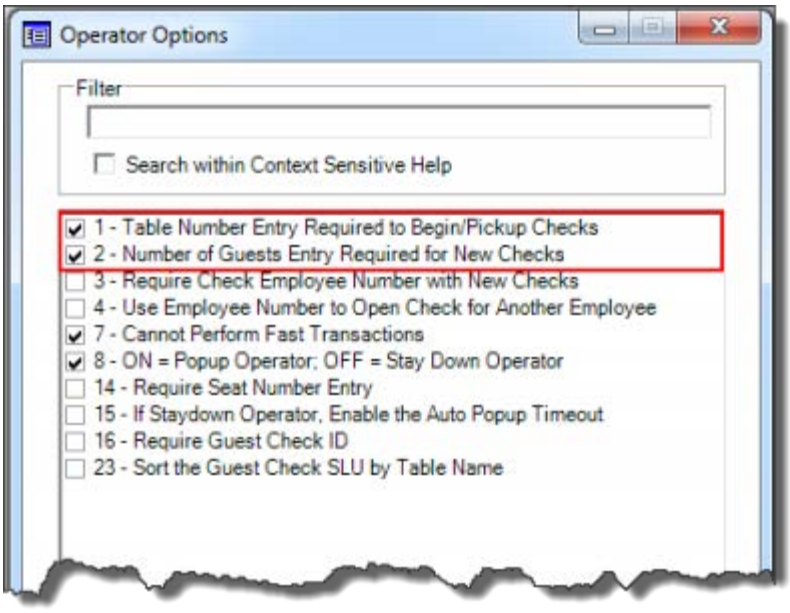
2. Add a Button, select the Function as "Type" and then select **Touch Split**.

3. Sign onto an Ops client.
4. Begin a Banquet Check and Service Total it after ringing some menu items.
5. Open the Banquet Check from the check list and select **Touch Split**.
6. Add a check and move some menu items from one check to another.
7. Click **Save**.
8. Click **Yes** on the "Exit and save changes?" screen.
9. Click **Yes** again on the "Print split checks?" screen. The Banquet Check is split and the individual checks can be viewed in the open checks list. The first check's prompt data is copied to the second check when the checks are split.



To configure RVC table names as room names

1. Navigate to the *EMC-> Property level-> Configuration-> Personnel-> Employee Classes-> **Operator Options*** to open the Operator Option screen and enable option **[1- Table Number Entry Required to Begin/Pickup Checks]** and option **[2- Number of Guest Entry Required for New Checks]**.



The CSH for **[1- Table Number Entry Required to Begin/Pickup Checks]** reads as follows:

Select this option to require an operator to enter a table number when beginning a guest check.

The CSH for **[2- Number of Guest Entry Required for New Checks]** reads as follows:

Select this option to require an operator to enter the number of guests when beginning a guest check. The setting of this option is overridden if "Use Number of Seats for Guest Count" is enabled in RVC Parameters.

2. Navigate to the *EMC-> Revenue Center level-> Setup-> RVC Configuration->* ***Tables*** and add a record to the RVC tables (Table View).
3. Click on an available Record row and enter a room name (i.e., Board Room).

4. Click **Save** on the menu toolbar.
5. The room name will be accepted and saved in the EMC.
6. Click **Save** on the menu toolbar.
7. The room name will be accepted and saved in the EMC.

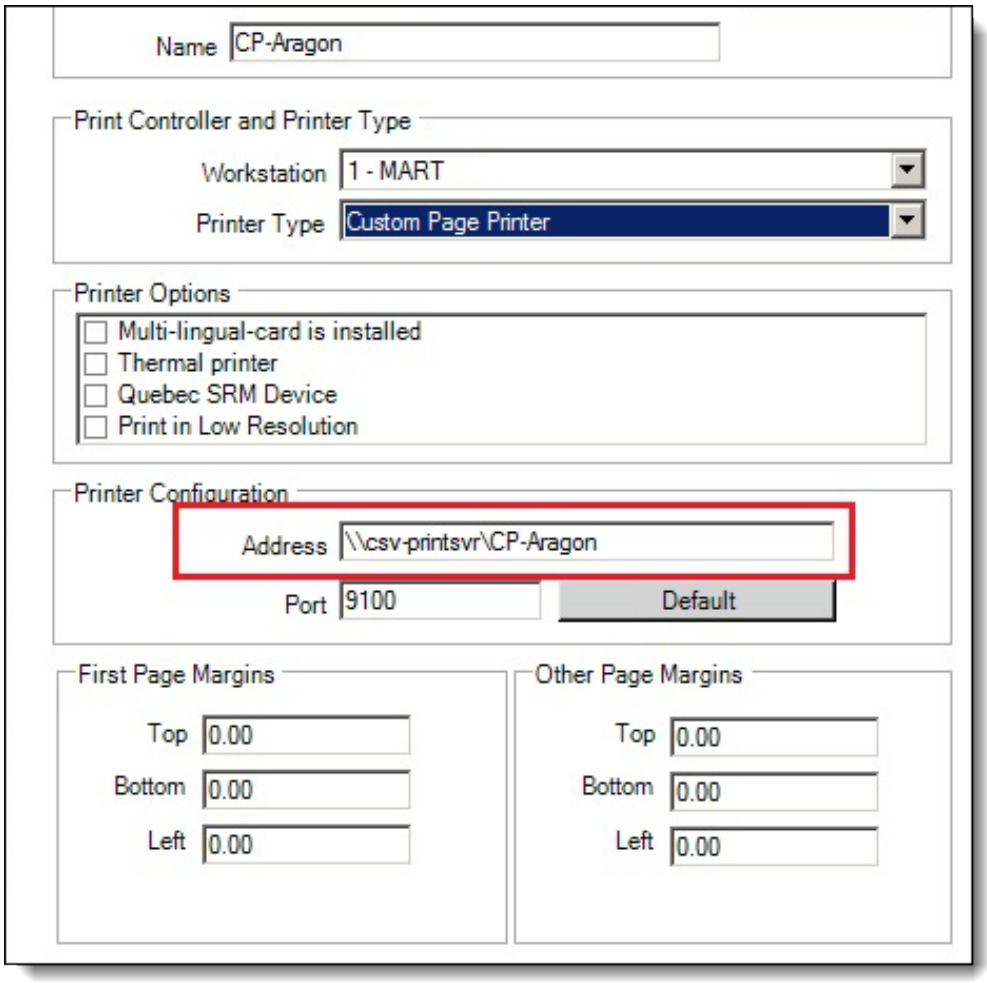
To configure a custom page printer

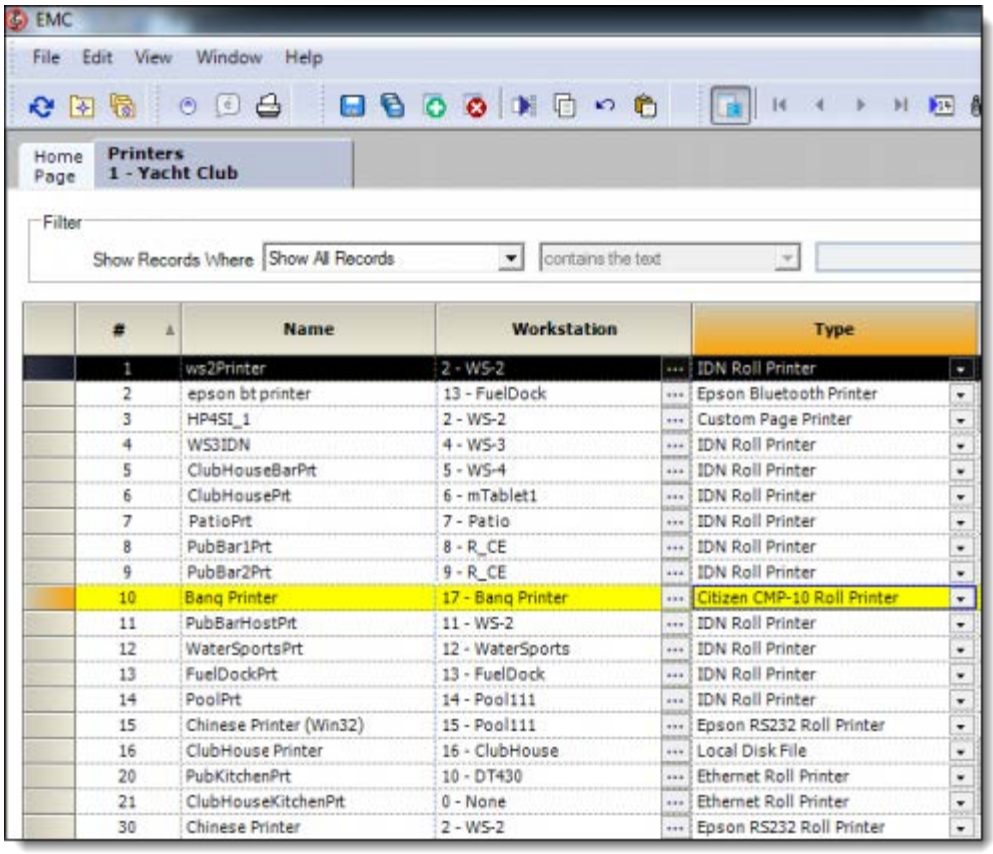
1. A Printer driver must be installed on the workstation.

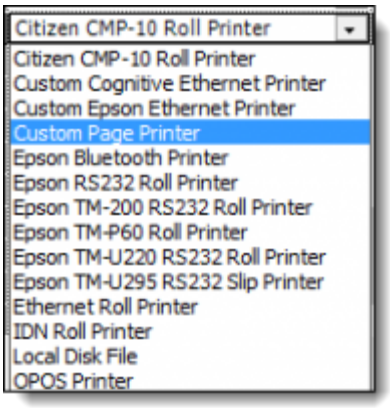
2. Enter the hostname of the printer.
3. Navigate to the *EMC-> Property level-> Hardware/Interfaces-> Clients and Printing->* ***Printers***.

4. Configure a network printer to use the new printer type, "Custom Page Printer."
5. Select **Custom Page Printer** from the Type pull down menu.

Devices (3)
Elo TouchSystems 2216 AccuTouch® U...
MART
USB Keyboard
Printers and Faxes (5)
CP-Aragon on csv-printsvr
CP-Casper on csv-printsvr
CP-Gryphon on csv-printsvr
Fax
Microsoft XPS Document Writer


Name CP-Aragon
Print Controller and Printer Type
Workstation 1 - MART
Printer Type Custom Page Printer
Printer Options
Multi-lingual-card is installed
Thermal printer
Quebec SRM Device
Print in Low Resolution
Printer Configuration
Address \\csv-printsvr\CP-Aragon
Port 9100
Default
First Page Margins
Top 0.00
Bottom 0.00
Left 0.00
Other Page Margins
Top 0.00
Bottom 0.00
Left 0.00



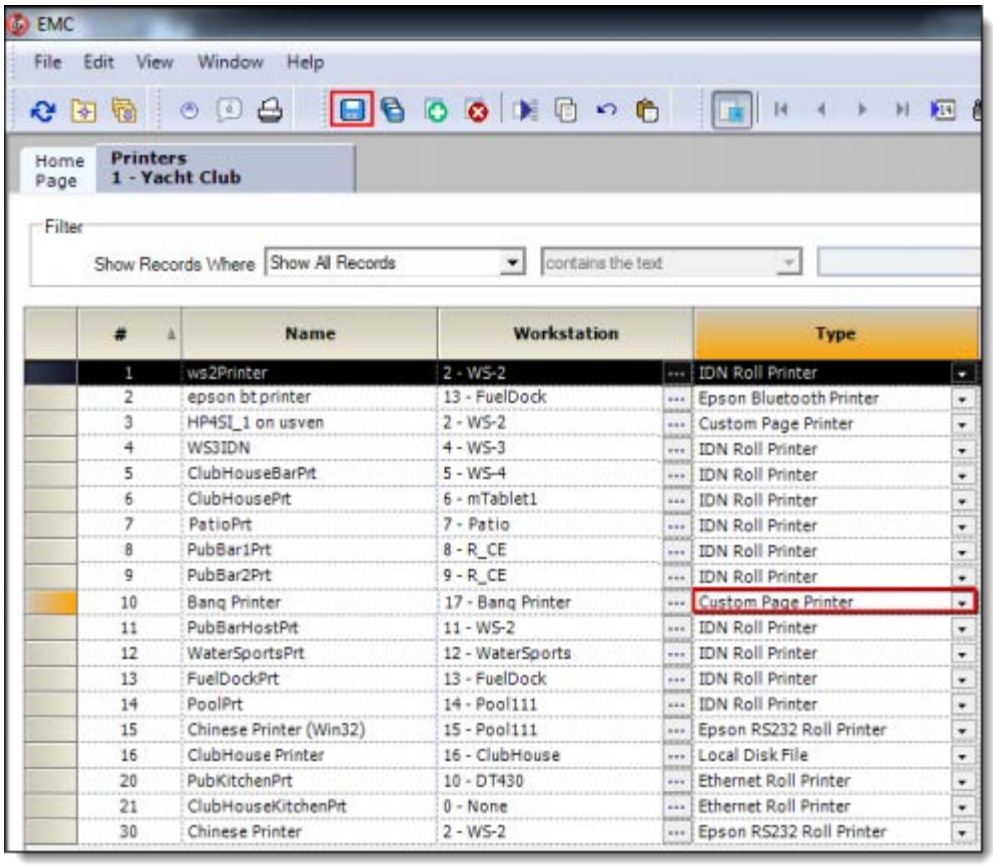


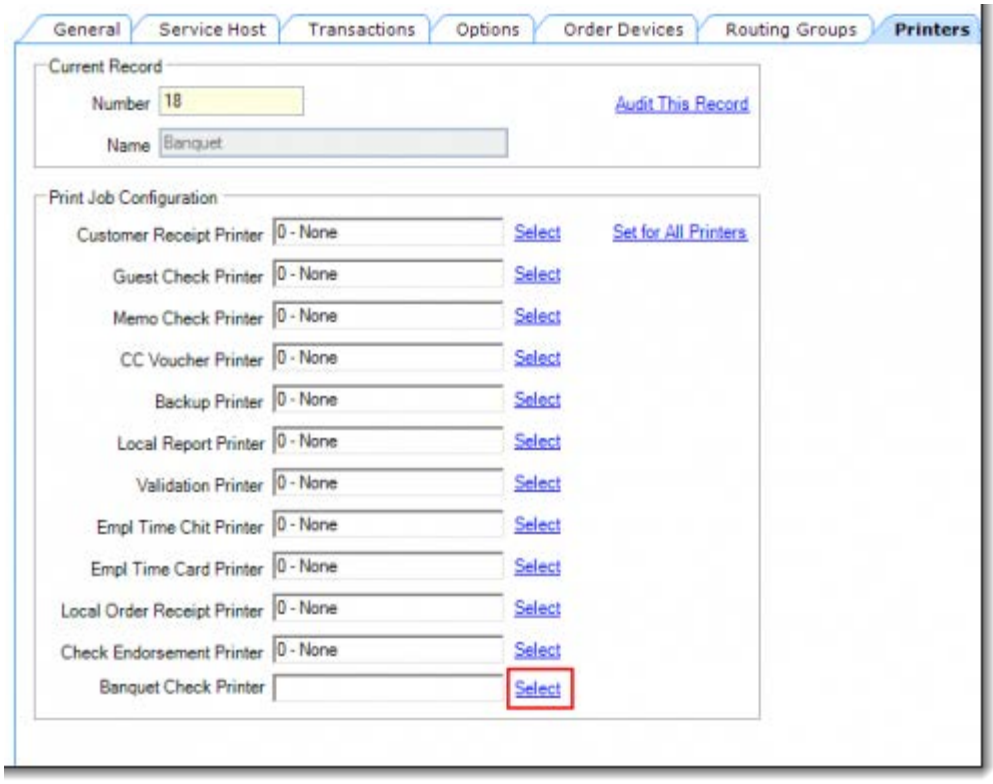
6. Enter the network printer name in the **Name** field.

Note: This name has to be the physical printer name of the printer as seen on the network and the printer host's IP address in the **Address** field.

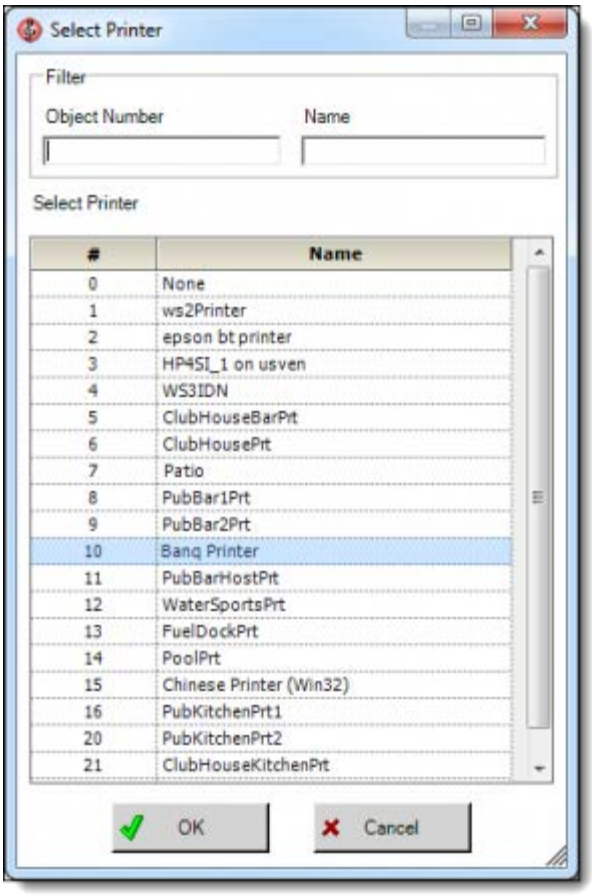
7. Click **Save** on the toolbar when finished.
8. Navigate to the *EMC-> Property level-> Setup-> Hardware/Interfaces-> Clients and Printing-> Workstations->* ***Printers tab***.

9. Click **Select** for the output printer in the **Banquet Check Printer** field.

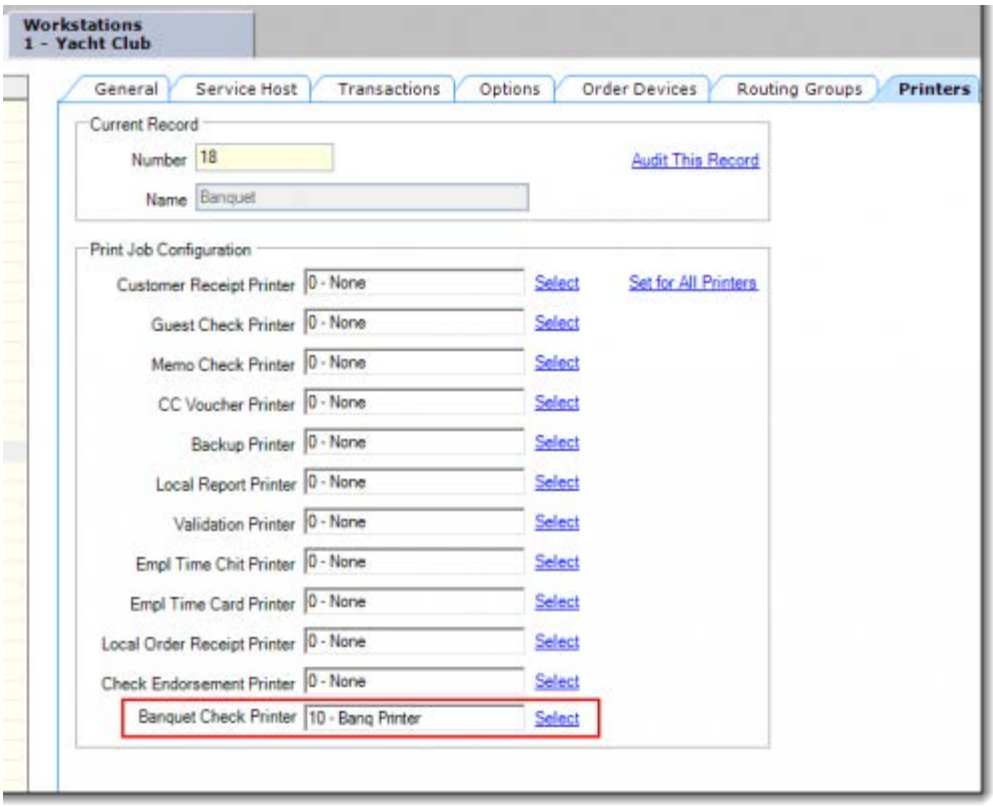




10. Select the Custom Page Printer as the output printer in the **Banquet Check Printer** field and click **OK**.



11. Click **Save** on the toolbar.



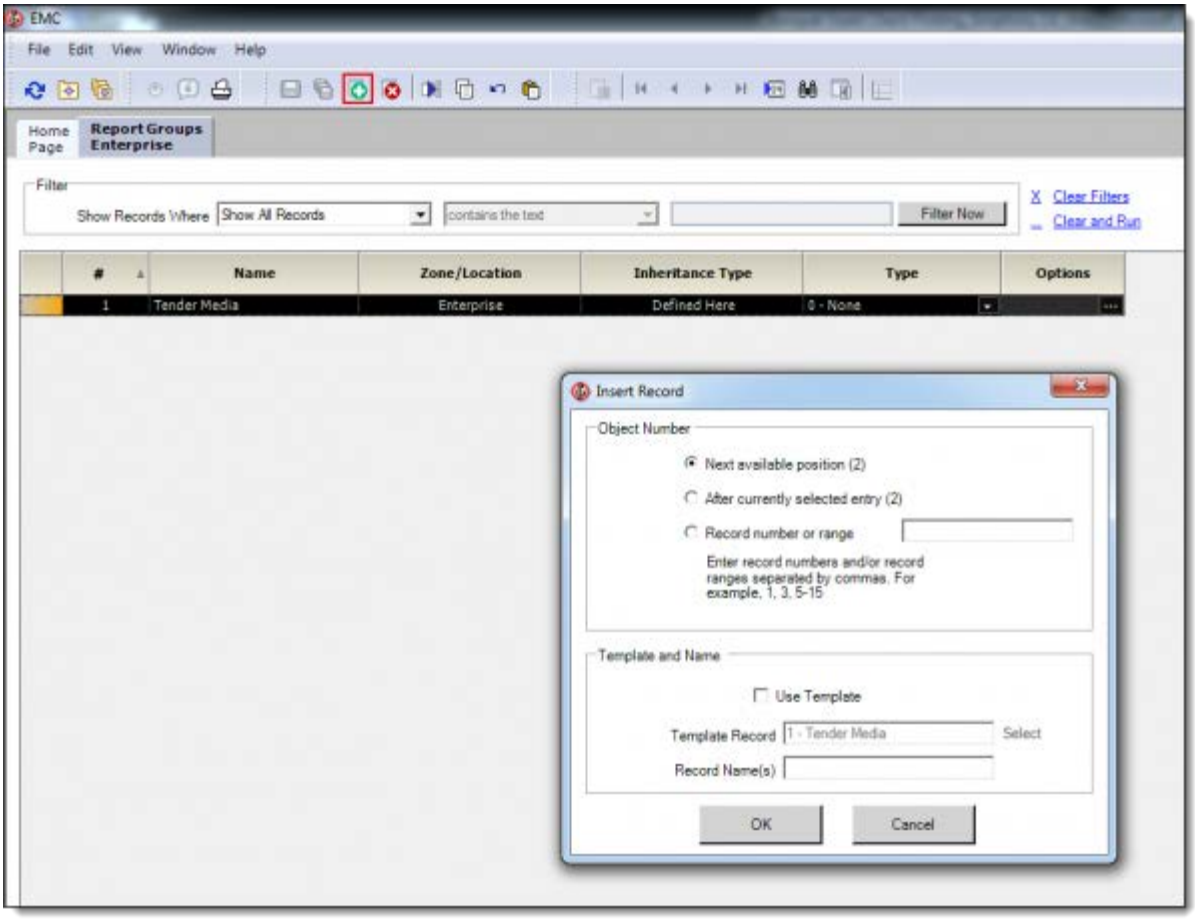
The CSH for **Banquet Check Printer** reads as follows:

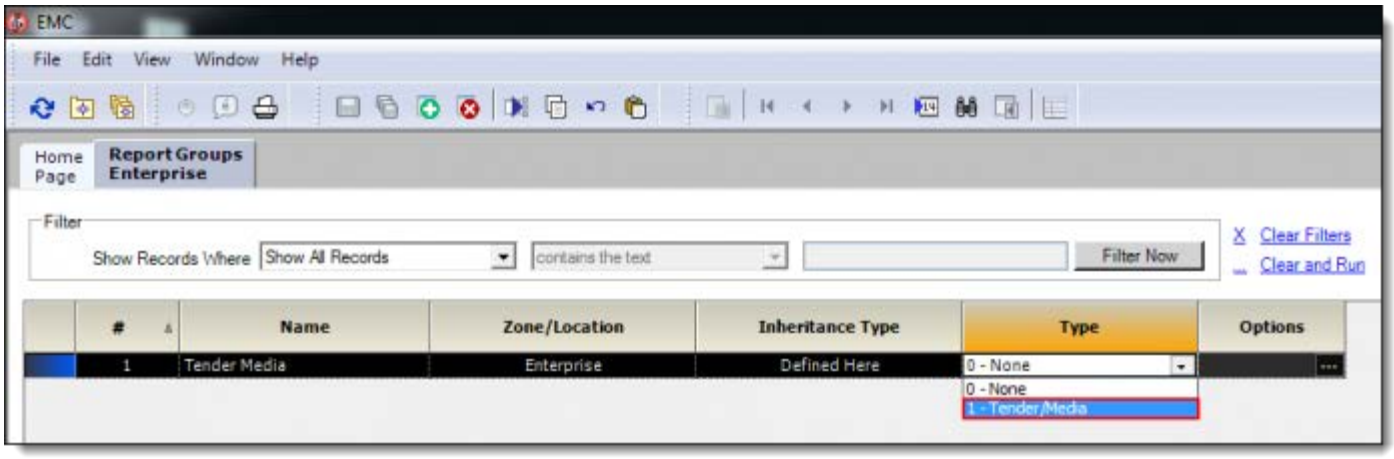
Select the printer to be used for printing Banquet Checks.

To configure a Tender Media Deposit

Users can post a Deposit Tender on a Banquet Check. If configured, the Deposit Tender prints in a special location on the Banquet Check.

1. Navigate to the *EMC-> Enterprise level-> Configuration-> Reporting and Data->* ***Report Groups Enterprise***.
2. Add a record to the table.



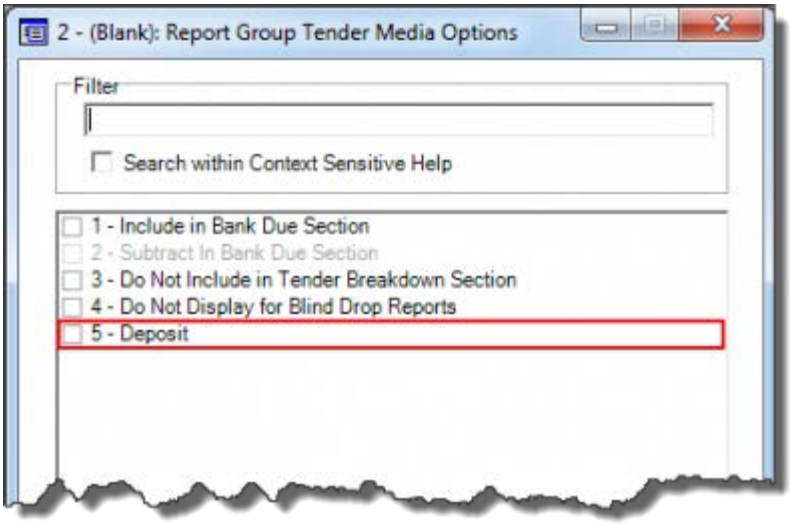


3. Select the type as **Tender/Media**

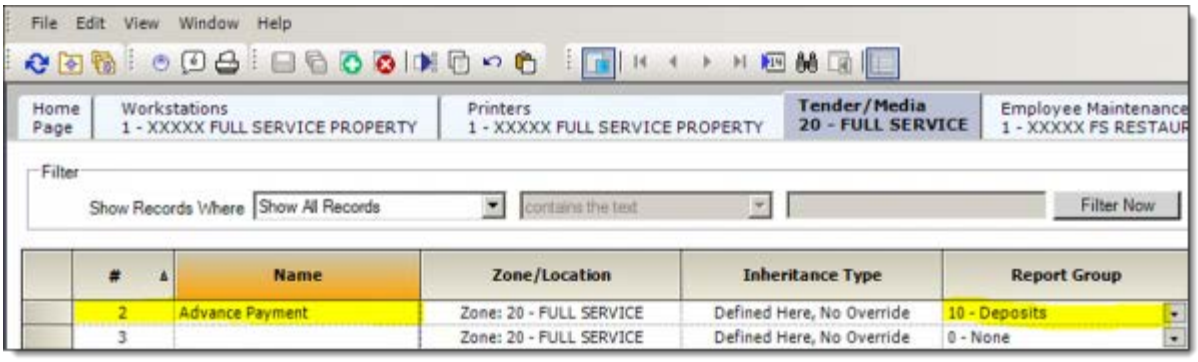
4. The Deposit Tender is linked to the Report Group with the option **[5- Deposit]**. Click the option bits (**…**) to open the Report Group Tender Media Options screen. Select option **[5- Deposit]** to enable the Deposit option.

   The CSH for **[5- Deposit]** reads as follows:

   This option will be used to prevent deposit type of tenders in this group from showing on reports.



5. Users can add an advance deposit against the Banquet Check by configuring a new tender.



To configure a Tender Media Printing

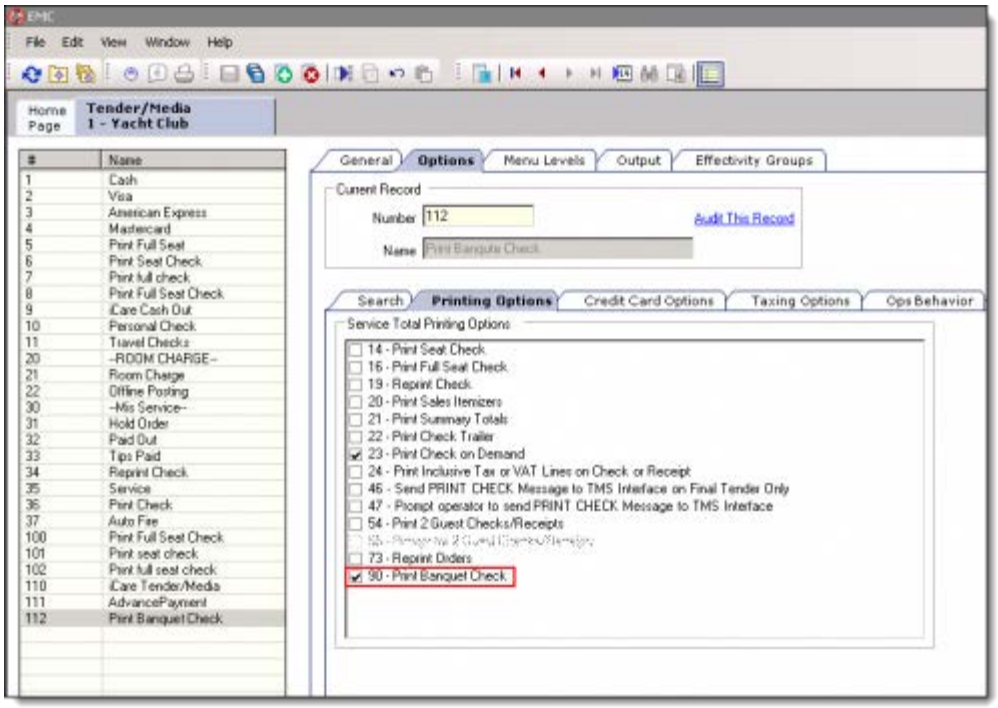
1. Before printing a Banquet Check, navigate to the *EMC-> <Enterprise / Property>-> Configuration-> Sales-> Tender/Media-> Options->* ***Printing Options*** and enable

option **[90- Print Banquet Check]**.

2. To print, select the Service Total key with option **[90- Print Banquet Check]** enabled.

The CSH for **[90- Print Banquet Check]** reads as follows:

Enable this option to print a Banquet Check.



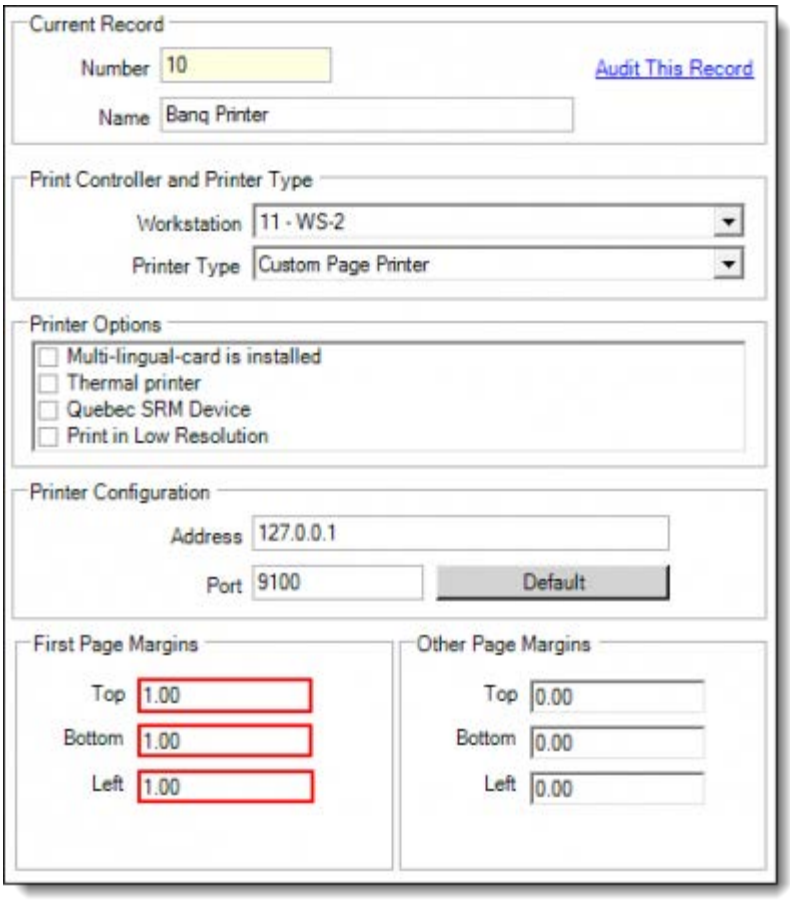
To configure page margins for Banquet Guest Check Printing

1. Navigate to the *EMC-> Property level-> Setup-> Hardware/Interfaces->Clients and Printing->* ***Printers***.
2. Select the Banquet check printer.

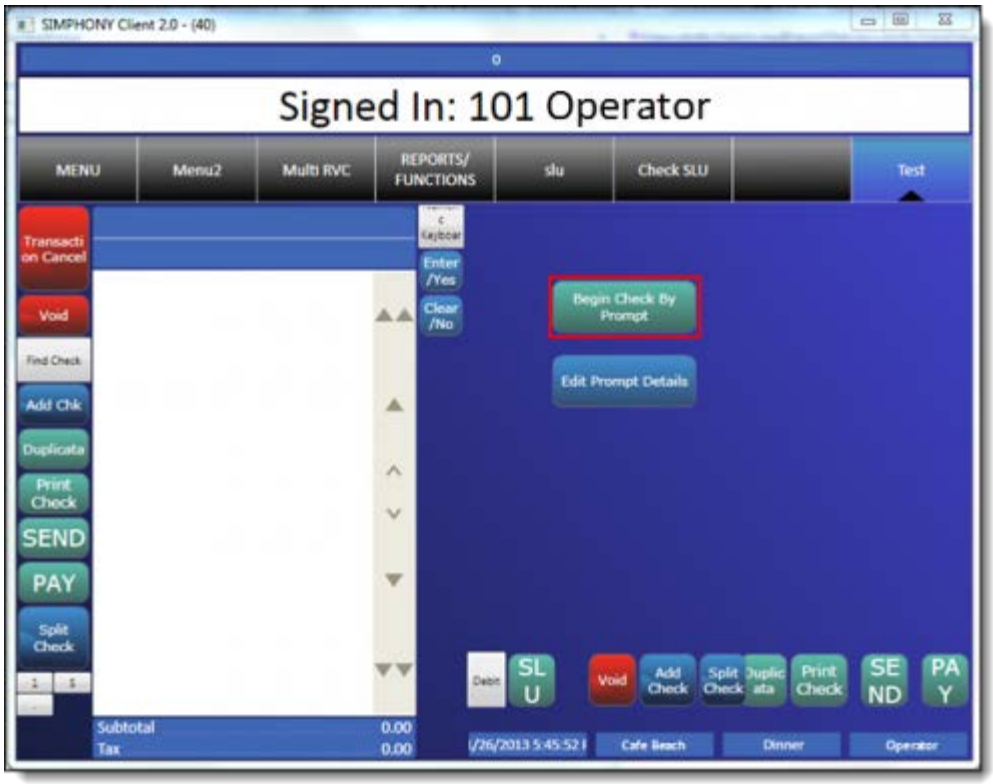
3. Enter the values for the top margin, bottom margin, and left margin.
4. Click **Save**.

Usage

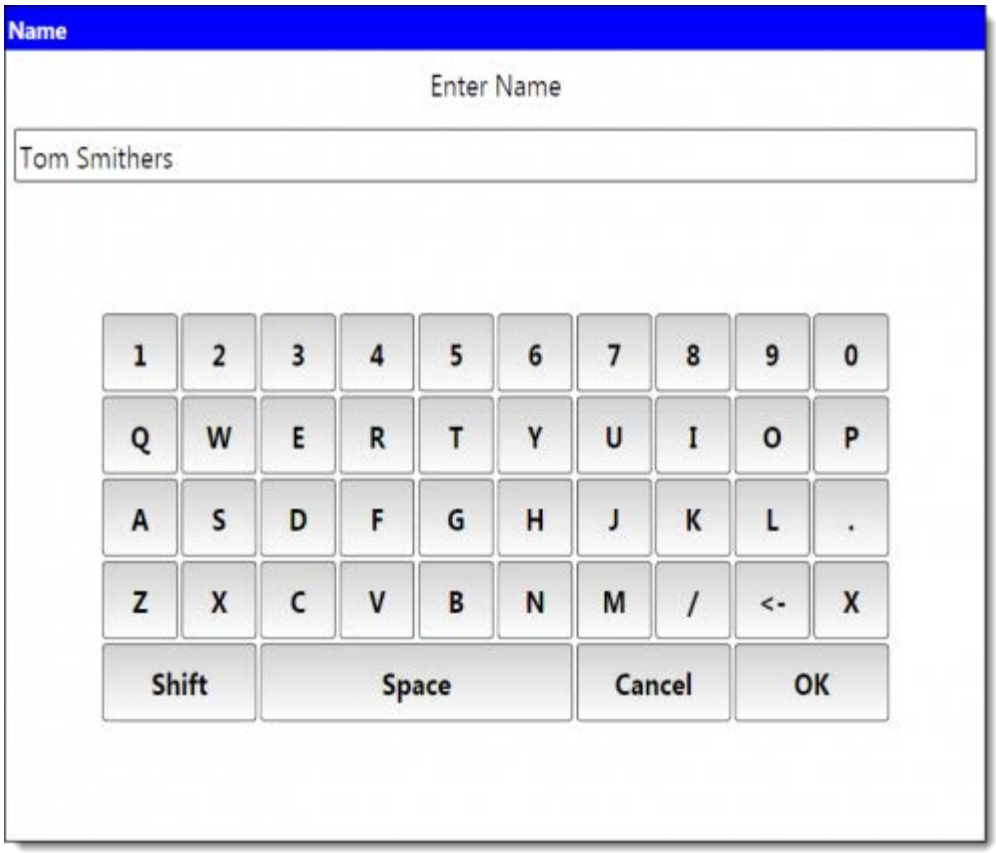
To Begin the Banquet Check



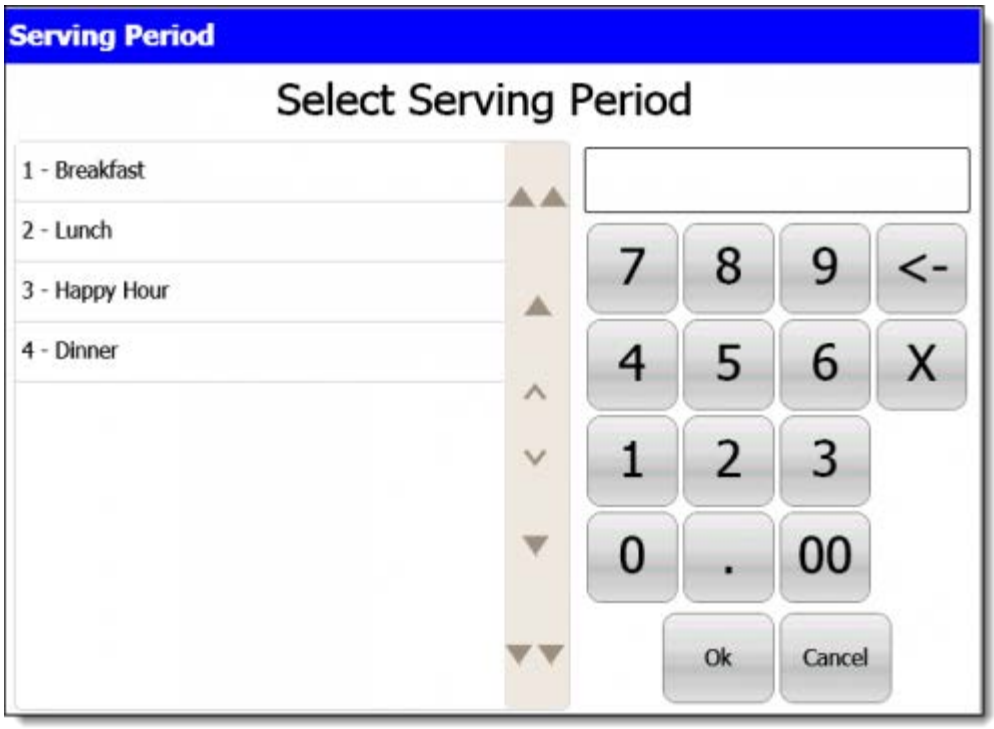
Note: If the user clicks Cancel on any one of the Banquet Check prompts, the check/transaction will be cancelled.



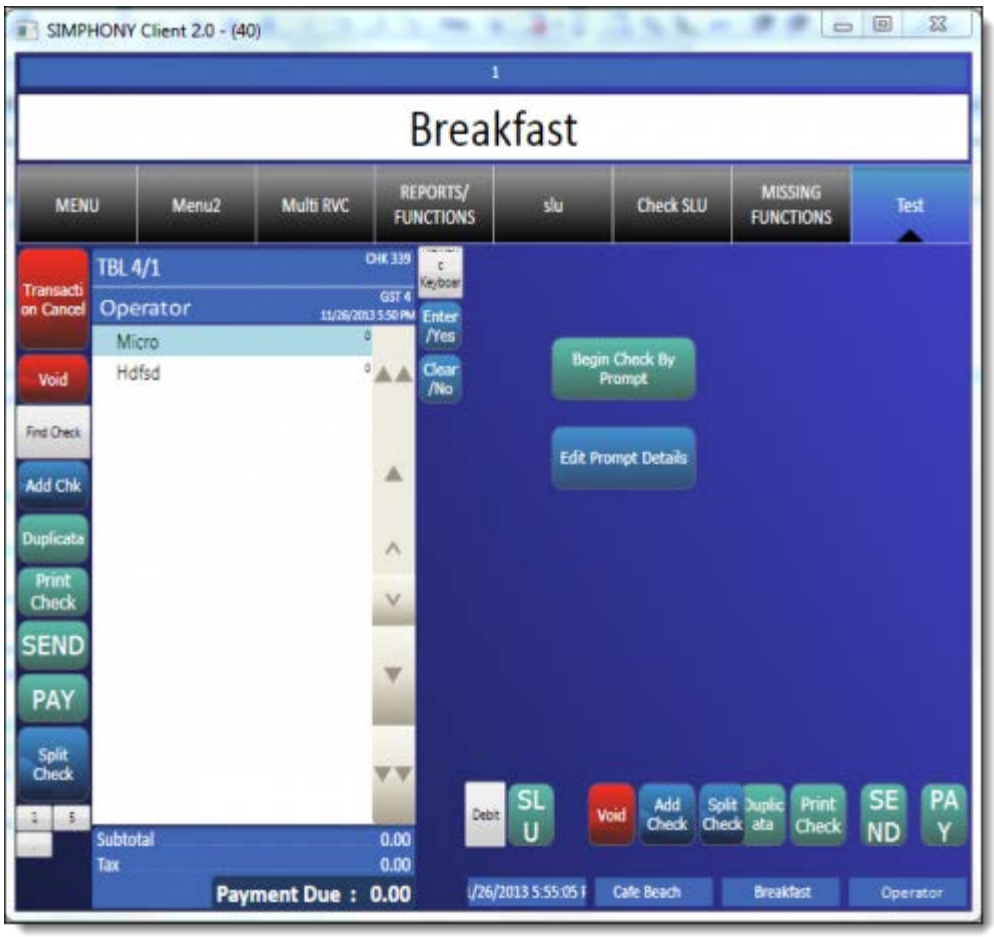
1. After configuring "Begin Check By Prompt" in the EMC's Page Design, run the service host and click **Begin Check By Prompt**.
   #:
2. Add the header detail through prompts.
3. Select the room name. This uses the "Tables" data to display a list of room names.



4. Select the Serving Period.

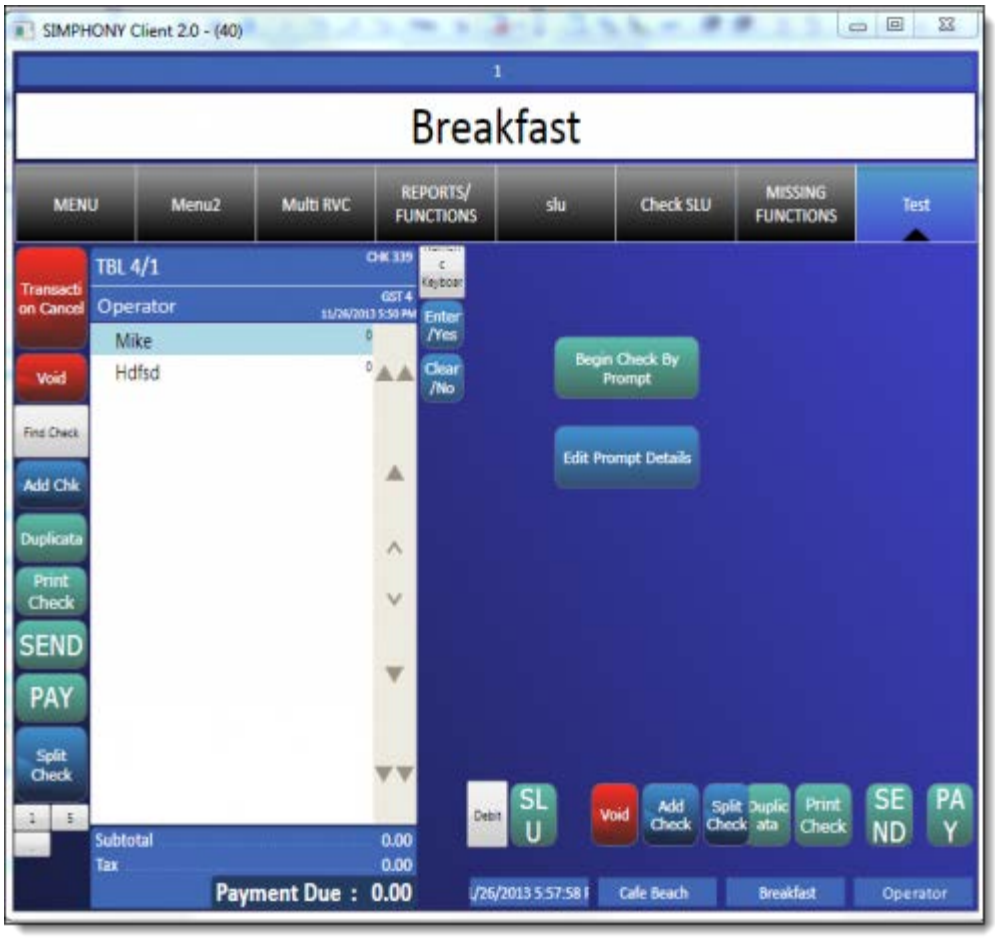


5. The Check Detail Area displays the entered header content.



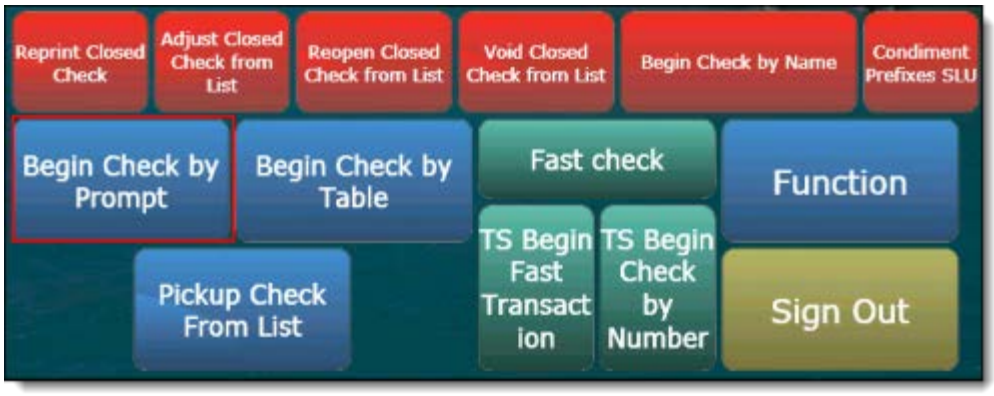
6. Select the Header Content and edit.

7. The Check Detail Area displays the updated header name

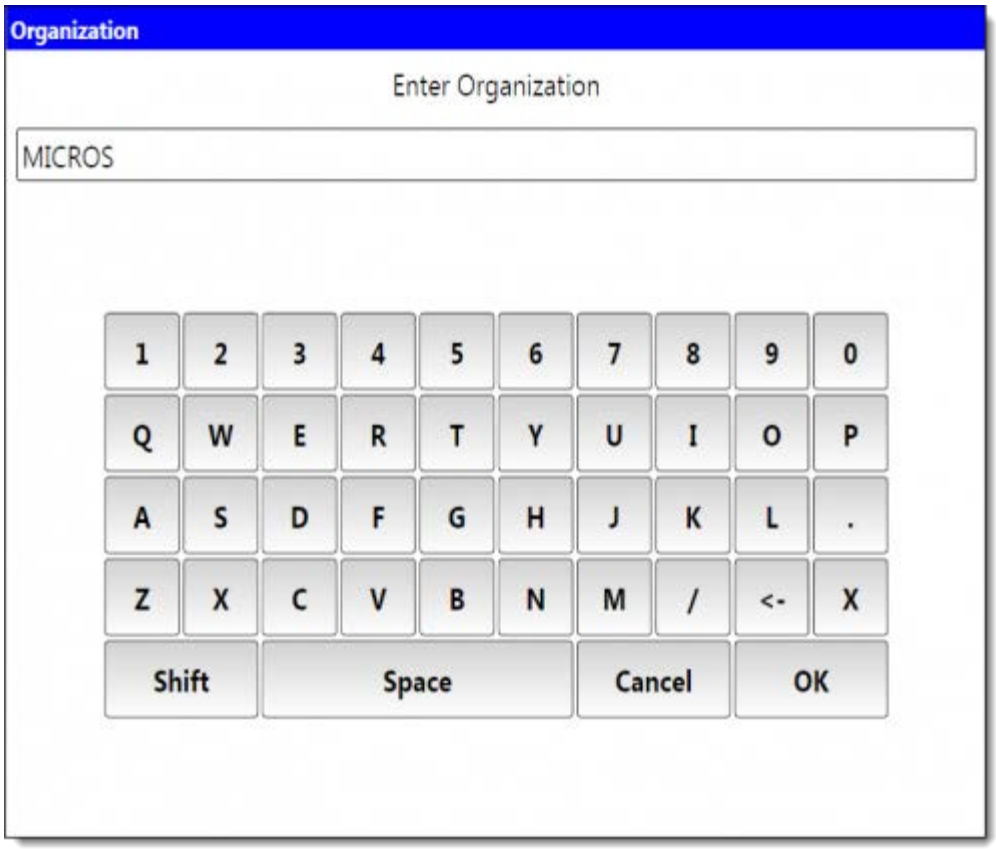


To use Banquet Check Serving Period

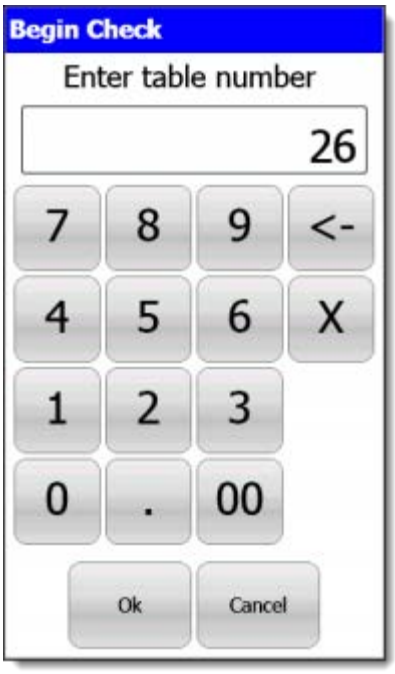
1. Log into Ops and click **Begin Check By Prompt**



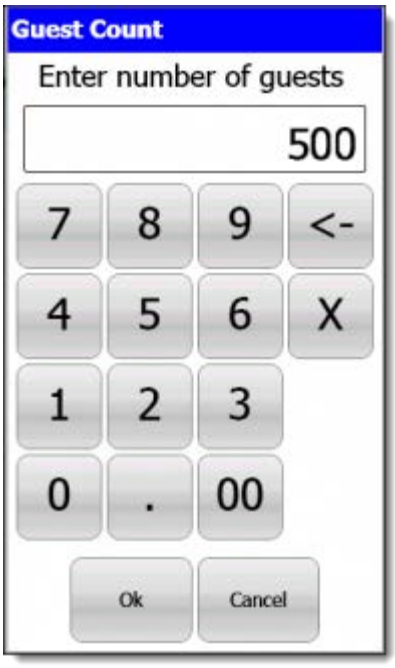
2. Enter the header prompt details and continue

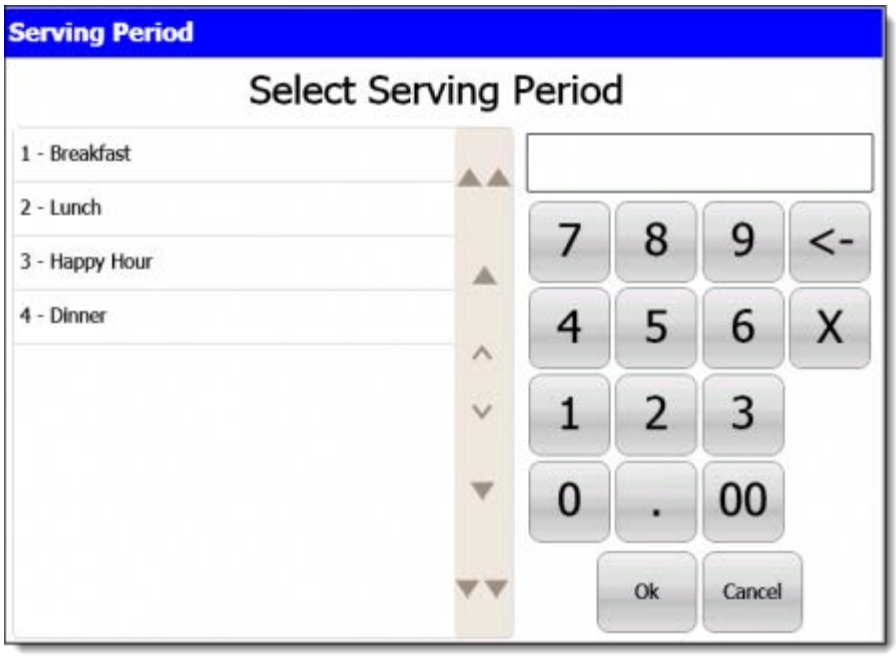


3. Select a table and click **OK**



4. Enter the number of guests and click **OK**
5. Select a serving period and click **OK**





Verification

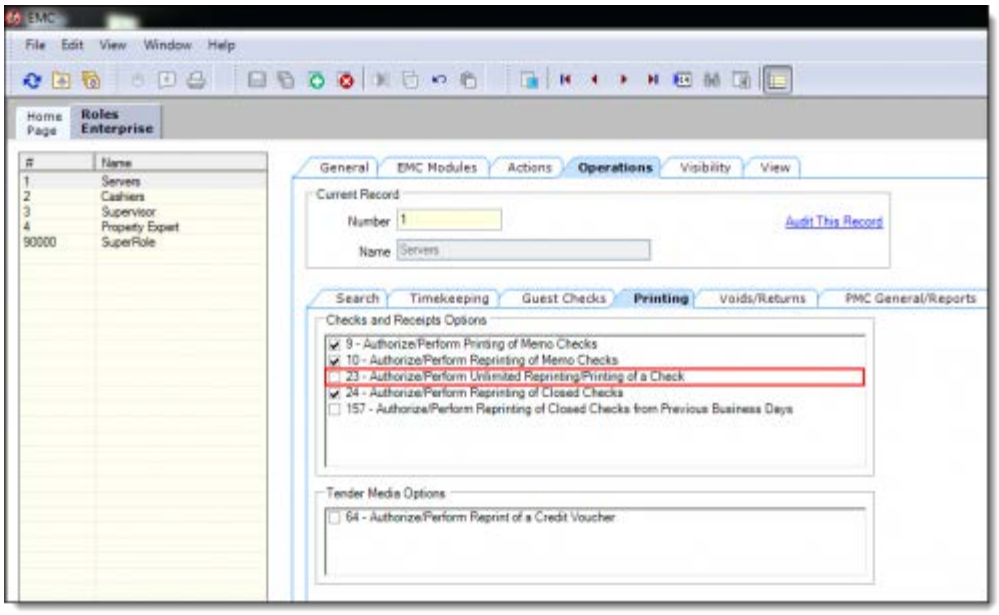
To verify if a Banquet Check Print is increasing the internal check print count

EMC Configuration

1. Select two operators with different roles
2. Navigate to the *EMC-> Enterprise level-> Configuration-> Personnel-> Roles-> Operations-> **Printing*** and disable Role option **[23- Authorize/Perform Unlimited Reprinting/Printing of a Check]** for operator #1.

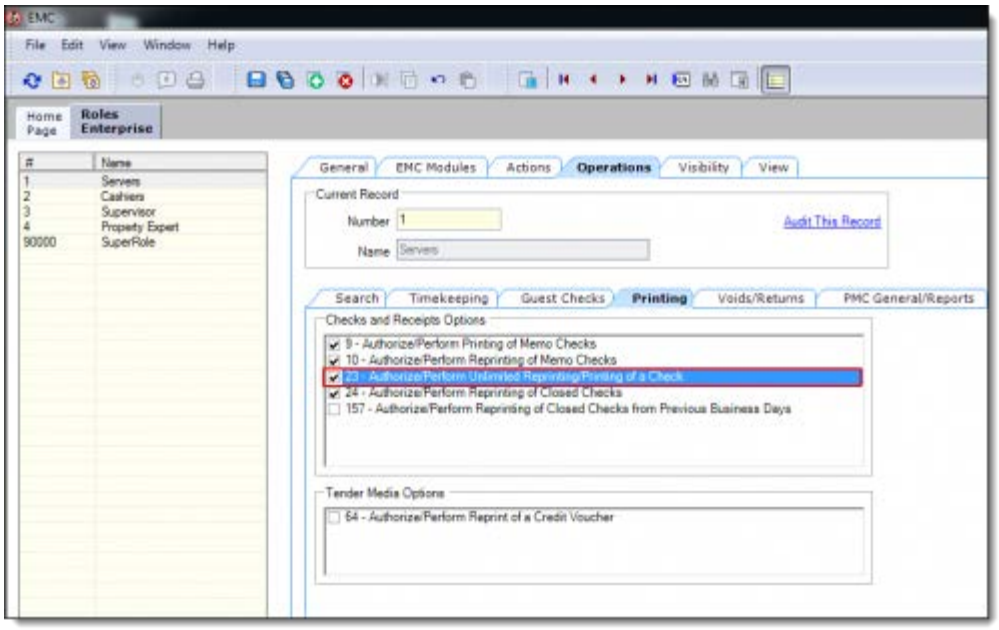
The CSH for **[23- Authorize/Perform Unlimited Reprinting/Printing of a Check]** reads as follows:

Select this option to allow Employees associated with this Role to perform two functions. #1: Allow On-Demand operators to print guest checks more than the



maximum number allowed in the Revenue Center Parameters Module. #2: Allow By-round operators to use the [Reprint Closed Check] and [Reprint Closed Check by Barcode Scan] keys. This privilege also allows Employees associated with this Role to give authorization to non-privileged Employees for these functions.

3. Navigate to the *EMC-> Enterprise level-> Configuration-> Personnel-> Roles-> Operations-> **Printing*** and enable Role option **[23-Authorize/Perform Unlimited Reprinting/Printing of a Check]** for operator #2.

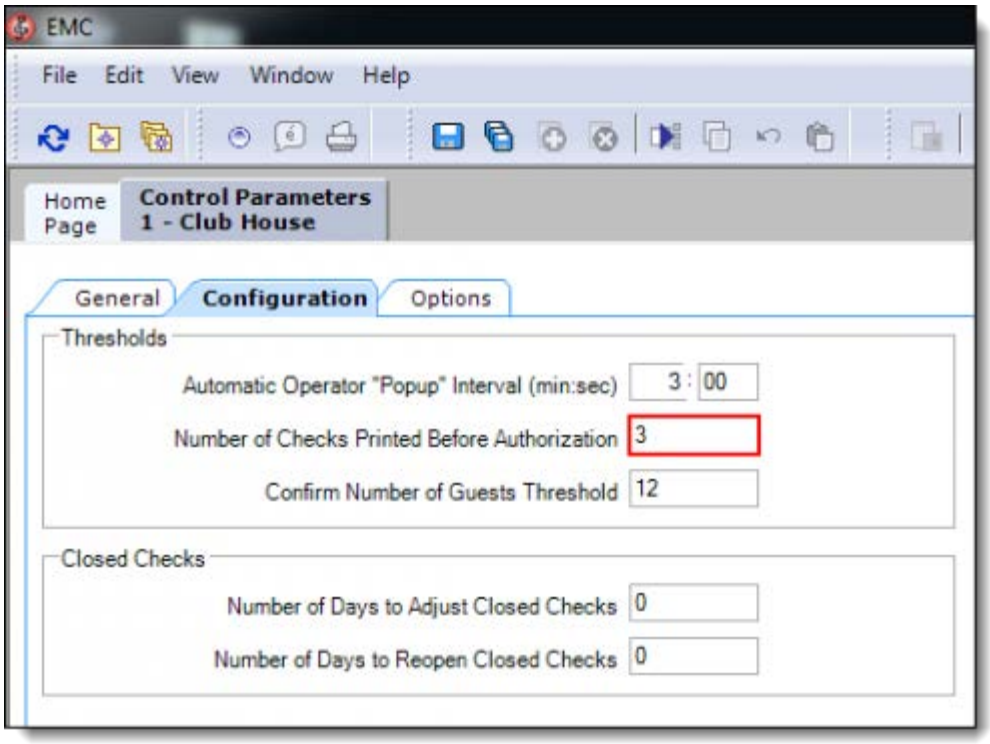


4. Navigate to the *EMC-> RVC level-> Setup-> Parameters-> Control Parameters-> **Configuration*** and enter **3** in Number of check printed before authorization

The CSH for **Number of Checks Printed Before Authorization** reads as follows:

Enter the number of times (0-99)

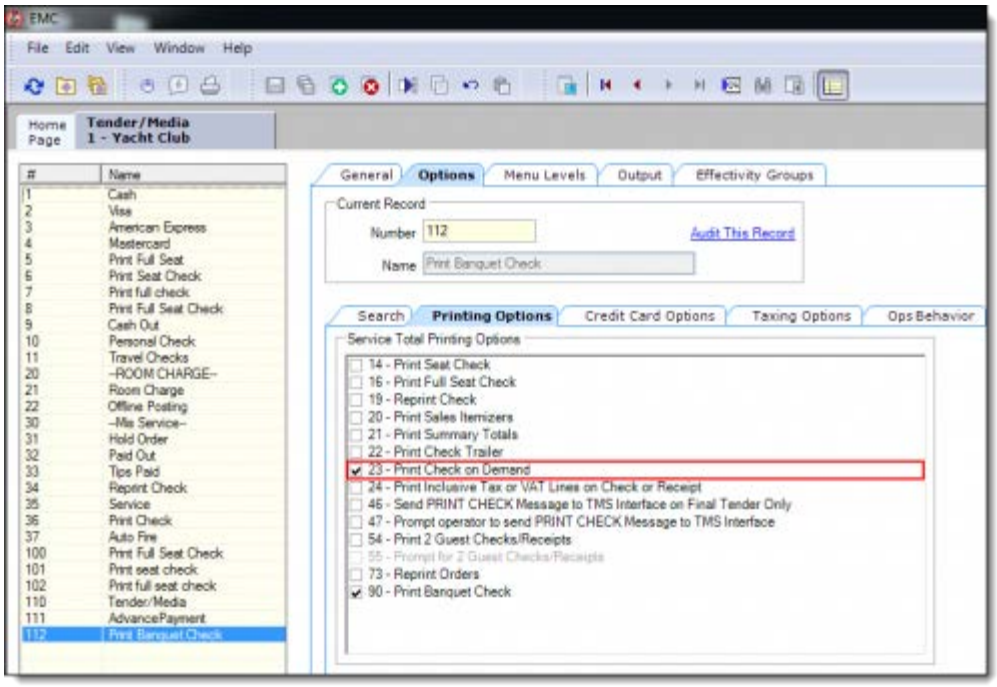
that an On Demand operator is allowed to reprint a guest check before manager authorization is required.



5. Navigate to the *EMC-> Property level-> Configuration-> Sales-> Tender/Media-> Options-> **Printing Options*** and enable option **[23- Print Check on Demand]**.

The CSH for **[23- Print Check on Demand]** reads as follows:

Select this option to print the guest check when it is tendered with this key (required for on-demand operators).



6. Configure a begin check by prompt button with configurable prompts
7. Operator type should be **[1 - On Demand]**

Ops Steps

1. Sign into Ops using Employee #1
2. Begin a banquet check and Ring menu items
3. Print the check 3 times
4. Print the check again (Fourth Time)
5. Enter Authorization of Employee #2

Begin Check

This article belongs to the MICROS **Important concepts** category.

This article discusses the usage of one or more **Function Keys**. (399, 400, 401, 435)

The term **Begin Check** is used to describe the beginning of a transaction. There are various methods to begin checks, and the functionality is usually configured based on an employee's job function. For instance, a waiter who has a section of tables typically begins checks by table number, whereas a bartender may usually begin checks as fast transactions or possibly by check ID. ***Note:*** *The term* ***check*** *in this article is a generic term that technically means* ***transaction****. In MICROS, there is a difference between Guest Checks and Customer Receipts, but for purposes of this article, to begin a "check" simply means to start a transaction.*

Contents

- 1 Function Keys
- 2 Fast Transactions
- 3 Privileges
- 4 See also

Function Keys

399 - Begin Party Check
: This key is used to begin Party Checks. If the Revenue Center Parameters option to **[Prompt for Guest Check Information when Beginning Party Check]** is enabled, the operator will be prompted to enter Guest Information. See Party Check for more information.

400 - Begin Check by Number
: This key is used to begin checks by check number. A Revenue Center Parameter option determines if check numbers are generated automatically, or if the operator will enter a check number. Typically, check numbers are generated automatically.

401 - Begin Check by Table
: This key is used to begin checks by table number. Revenue Centers can be programmed to use either the 5-digit Table Number or the 4-character Table ID. See Table Number for more information. This function is often used by servers who are assigned a section of tables in a restaurant.

435 - Begin Check by ID
: This key is used to begin checks by Guest Check ID. This function is often used by bartenders who need a way to identify a customer. For example, a bartender may use an ID to show a customer’s name, or shirt color so the check can be easily identified on the Open Check SLU.

You must be authorized to begin a guest check. You may also be required to begin a check by table number. If this is the case, you cannot begin a check by check number.

Fast Transactions

A transaction can be started as a Fast Transaction, which means that an operator presses a menu item key to start the transaction. See the Fast Transaction article for more information.

Privileges

To begin checks, an employee must be associated with an Employee Role with the **[Create New Checks using [Begin Check] key]** option enabled.

Begin Check for Another Operator

The **Begin Check for Another Operator** feature is designed for one operator to begin checks for another operator. The feature is commonly used by hosts who begin checks for servers, or by room service attendants who begin orders for the room service food runners.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Example
- 2 EMC Configuration
- 3 Workstation Functionality
  - 3.1 Using Prompts for Employee or ID Number
  - 3.2 Using Auto Begin Check
- 4 See Also

Example

Terri, the hostess, seats a party at Table 12 and takes their drink order. She then begins a check for Jerald, who will be the server at Table 12 for the remainder of their stay. Before service totalling, Terri may add the drink order for the table. If items are ordered, the sales may post to the check operator (Jerald) or the transaction operator (Terri), based on the Revenue Center Parameters posting options.

EMC Configuration

For a user to begin a check for another operator, the operator option, **[Require Check Employee Number with New Checks]**, must be enabled, or the workstation option **[Auto Begin Check when Check Operator Number or ID is Entered Outside of a transaction]** must be enabled.

Optionally, the operation option, **[Use Employee Number to Open Check for Another Employee]**, may be enabled. If this option is enabled, the operator beginning the check will be required to enter the employee number of the operator for whom the check is being started. When this option is not selected, this operator will be required to enter the Employee ID of the other operator.

Workstation Functionality

Using Prompts for Employee or ID Number

1. Sign in.
2. Begin a check and, if necessary, enter a check number or table number.
3. The workstation prompts for the employee number/ID, based on the EMC configuration above.
4. Enter the employee number or Employee ID of the employee for whom you are opening this check.

5. A new check displays, ready for transaction entries.

Using Auto Begin Check

This functionality is only in use when the workstation option, **[Auto Begin Check when Check Operator Number or ID is Entered Outside of a transaction]** is enabled. ***Note:*** *This option cannot be used to open checks by table number.*

1. Sign in.
2. Enter the employee number or Employee ID of the employee for whom you are opening this check.
3. If necessary, enter a check number.
4. A new check displays, ready for transaction entries. Your last name appears in the upper right corner of the display. The check operator's name and employee number appear in the transaction summary.
5. If necessary, assign a table number using the **[Table Number]** function key.

Bluetooth Printer Bixolon-SPP-R200II Setup

This article reviews the setup of the Bixolon-SPP-R200II Bluetooth printer. This device is supported for both versions of Simphony (v1.x and v2.x) and for all supported Mobile MICROS handhelds.

Contents

- 1 Printer Configuration
- 2 EMC Configuration
  - 2.1 Self-Test Instructions
- 3 See also

This article discusses a topic related to **hardware**.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

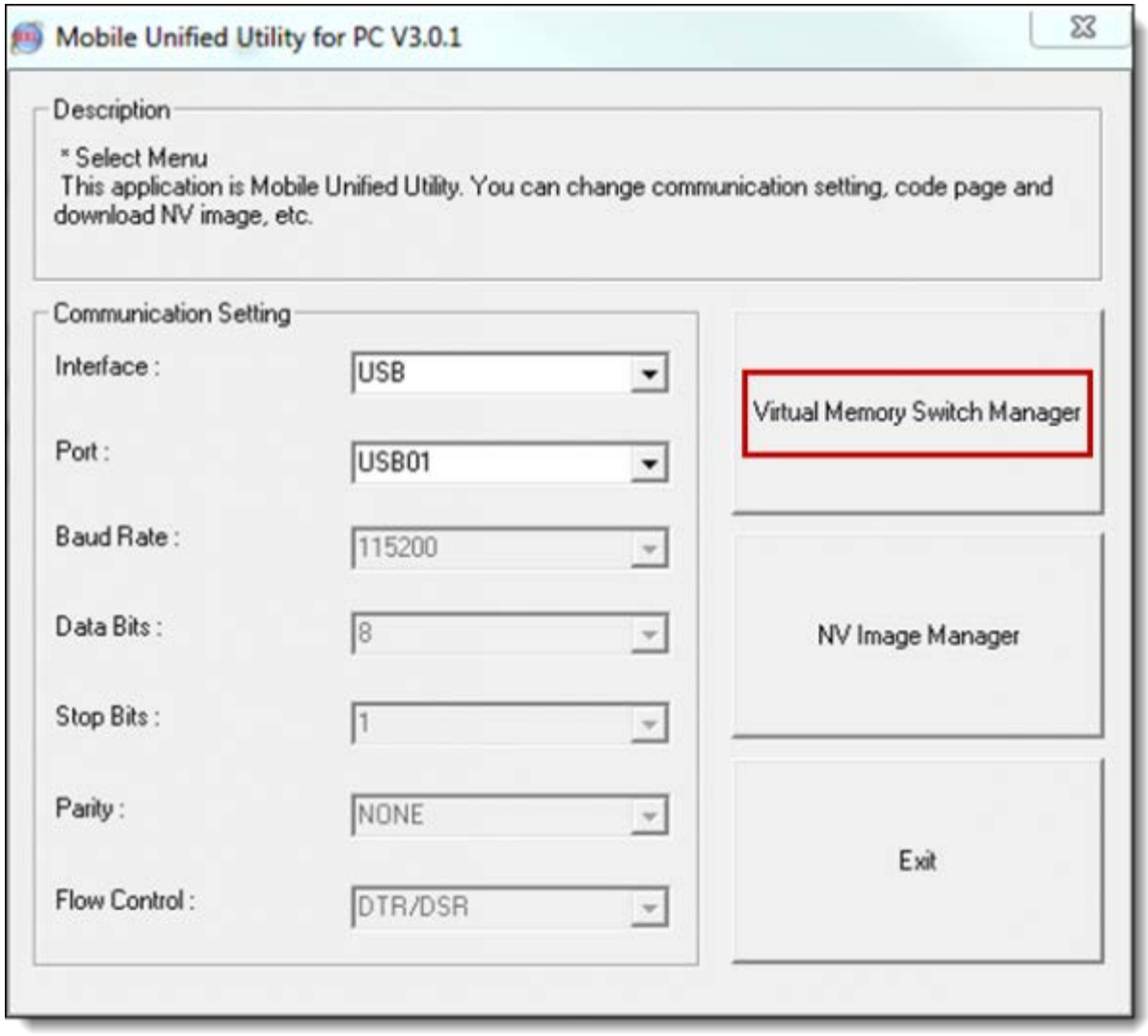
Printer Configuration

In order to modify the default printer configuration for the Bixolon-SPP-R200II Bluetooth printer, users should download and utilize the **Unified Mobile Utility** v.3.0.1 or v3.0.2.

It's available for download using the following link: http://www.bixolon.com/html/en/download/download_product.xhtml?prod_id=18

Once downloaded and installed, follow the steps as outlined below:

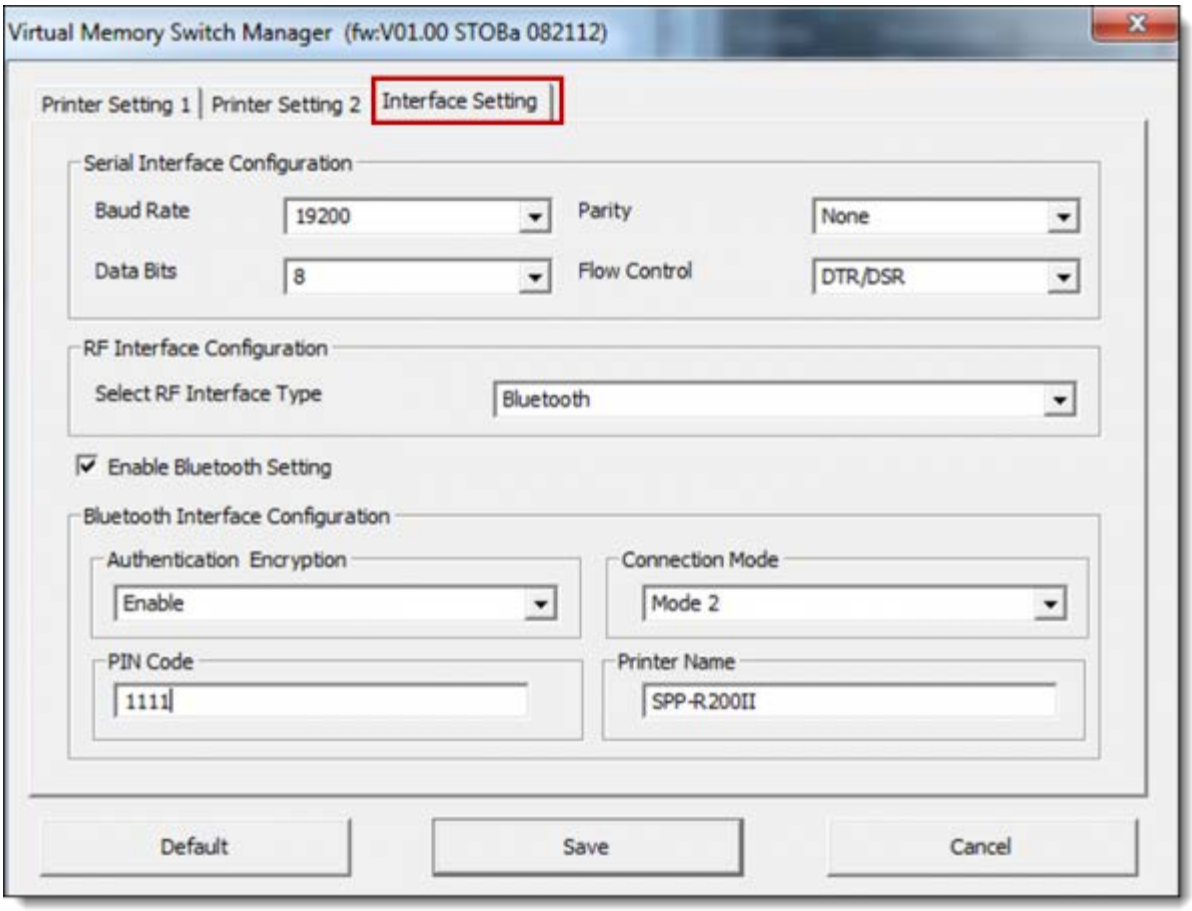
1. Connect a USB cable between the Bixolon printer and a PC and switch the printer from OFF to ON.
2. Under **Communication Setting**, within the '**Interface**' dropdown menu, select the '**USB**' connection type.
3. Select the correct **USB Port** from within the dropdown menu for the '**Port**' field.
4. From the PC's Desktop, click on the *Start button-> All Programs-> BIXOLON-> **Mobile Unified Utility***
5. Select the '**Virtual Memory Switch Manager**' button.



6. Select the '**Interface Setting**' tab.

7. Set the following fields to the listed settings as shown below:

   - **Baud Rate - 19200**
   - **Parity - None**
   - **Data Bits - 8**
   - **Flow Control - DTR/DSR**
   - **Select RF Interface Type -**



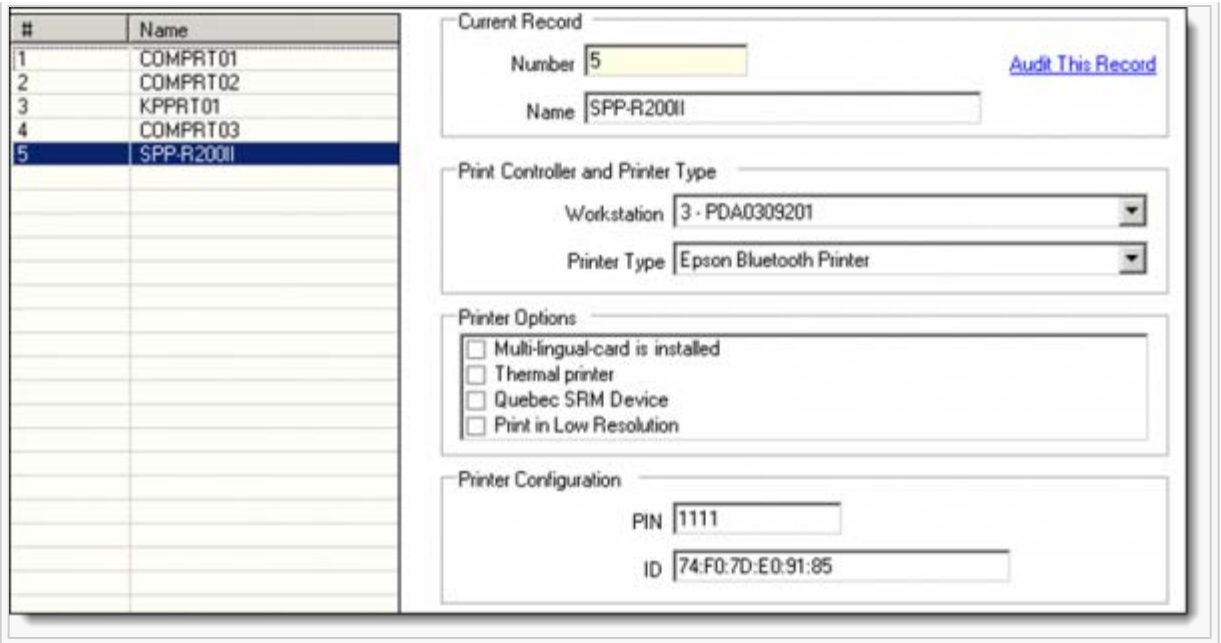
- **Bluetooth Enable Bluetooth Setting - Select the check box to enable**
- **Authentication Encryption - Enable**
- **Connection Mode - Mode 2**
- **PIN Code - 1111** (Or another code of your choice)
- **Printer Name - SPP-R200II**

8. Select the **Save** button and the printer will be updated with the new settings.

EMC Configuration

Shown here is the Simphony v2.x EMC-> '**Printers**' module.

1. Set the following settings as shown below:
    - **Name - SPP-R200II (Printer**

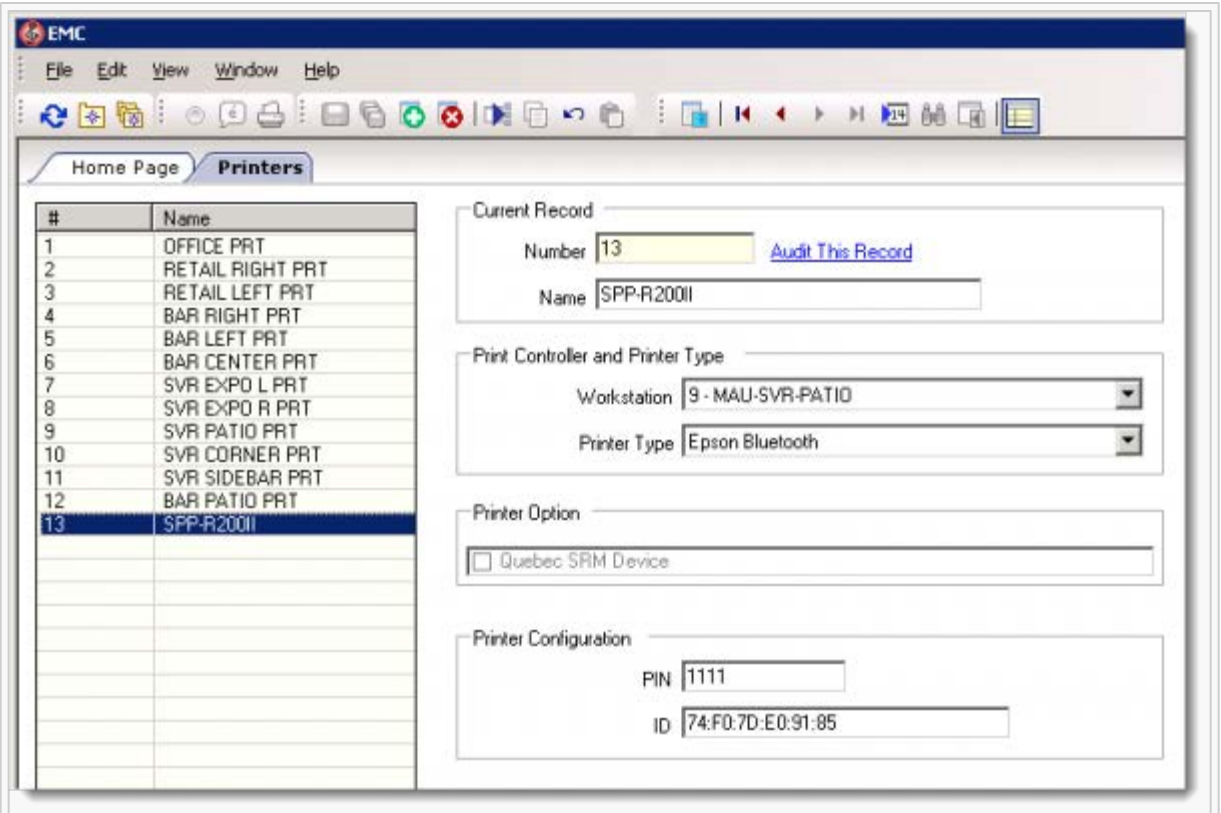


Simphony v2.x EMC-> Printers module

Name)

- **Printer Type - Epson Bluetooth Printer**
- **PIN - 1111 (Use the PIN Code that was set during the printer setup)**
- **ID - 00:00:00:00:00:00 - The Mac or Hardware address can be determined by running the printers Self Test!**

Shown here is the Simphony v1.x EMC-> '**Printers**' module.



Simphony v1.x EMC-> Printers module

Self-Test Instructions

1. Turn the printer power off and close the printer paper cover.
2. Pressing the paper feed button and power button simultaneously turns the printer on.
3. The printout is produced after releasing the two buttons.
4. To add a printout of the ASCII pattern, press the paper feed button once more.
5. After the ASCII pattern is printed out, the self-test is automatically terminated

See also

- Bluetooth Printing
- Printer Hardware Specifications

Bluetooth Printing

In Simphony, **Bluetooth Printing** refers to the configuration and usage of printing from an mTablet E Series workstation or a Mobile MICROS client to a wireless printer via the Bluetooth protocol.

This article discusses the usage of one or more **Function Keys**. (382)

This article discusses a topic related to **hardware**.

This article discusses functionality that relates to **Printing**.

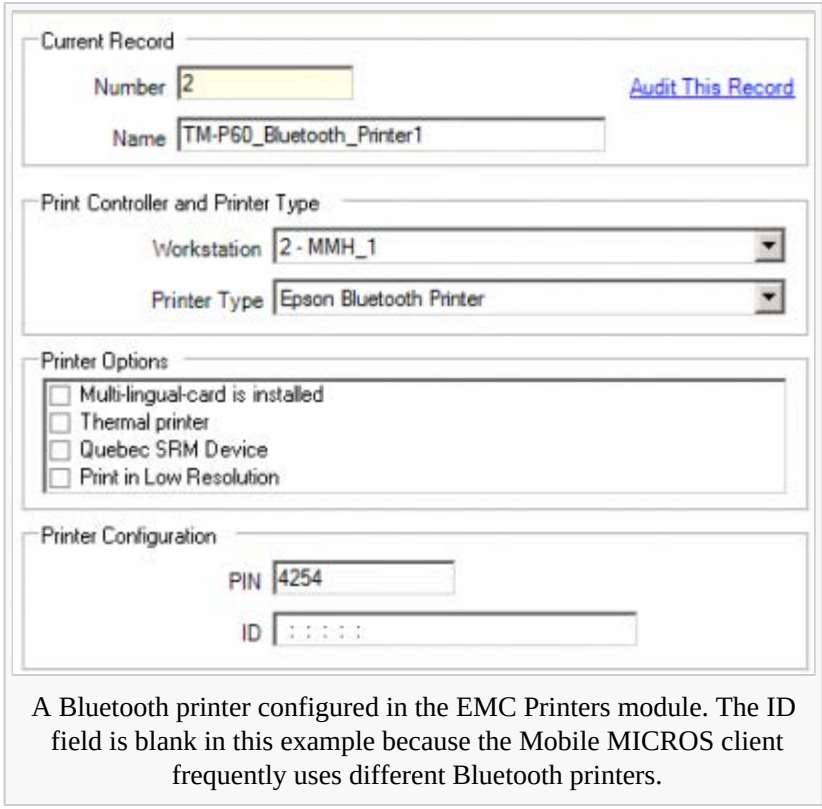
This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Configuring Bluetooth printing in EMC
- 2 Configuring Bluetooth printing in Ops
  - 2.1 Simphony version 2.7 with mTablet E Series
- 3 Supported printer hardware
- 4 See also

Configuring Bluetooth printing in EMC

1. From the EMC property scope, select the Printers module and then select or create a printer. In form view, a Bluetooth configuration panel appears (as shown on the right).
2. You can configure the Bluetooth printer using one of the following methods, depending on the environment where the handheld is being used:
   - The handheld device always uses the same Bluetooth printer. In this environment, enter the Bluetooth ID of the printer in the ID field. (This configuration is not shown in the image.)
   - The handheld device frequently uses different Bluetooth printers. This environment is common in stadiums or other large venues where the handheld devices are not stored with the same printers when not in use. In this type of environment, leave the ID field blank and configure the printer through the Printer dialog box.
   - The Bixolon-SPP-R200II model is supported for Bluetooth printing using the **Printer Type** of **[Epson Bluetooth Printer]** for mTablet Clients and all supported handheld devices (for Simphony version 1.6 MR6 and later and Simphony version 2.x).



A Bluetooth printer configured in the EMC Printers module. The ID field is blank in this example because the Mobile MICROS client frequently uses different Bluetooth printers.

Configuring Bluetooth printing in Ops

When you configure the Bluetooth printer with a Bluetooth ID in the EMC, you do not need to configure anything on the Mobile MICROS device.

When you configure the Bluetooth printer with a blank Bluetooth ID in the EMC, you must also configure the mTablet or Mobile MICROS device to print to the printer.

In a typical configuration, a Mobile MICROS device is the print controller for only one Bluetooth printer. However, if a device controls multiple printers, the steps shown here occur for each printer that the Mobile MICROS client controls.

Follow these configuration steps (generally at the beginning of the user's shift):

1. The user signs in to the device and presses the **[Select Printers]** function key (382).
2. The device shows a dialog box with the printer name from EMC. Press **OK**.
3. The Select Printer dialog appears. Press **[Search for Printers]**.
4. The device searches for all Bluetooth devices within range.
5. A list of all Bluetooth devices appears, showing the Bluetooth printer name its Bluetooth ID. Select the appropriate printer.
    - The Bluetooth printer's name that appears in the list is the physical printer name, not the name that is configured in EMC. This name is configured via an EPSON or Bixolon-SPP-R200II configuration utility.
    - When multiple printers are in range, they all appear. To determine a printer's Bluetooth ID, the P60 printer can print a diagnostics chit. To print this chit, power off the printer, and then press "feed" while powering the printer on.

The Bixolon-SPP-R200II printer does 'not' print the printer's PIN or Bluetooth ID number for security reasons. You can configure the device's Bluetooth ID using the software (cabling purchased separately) that accompanies the printer.

This configuration is only valid as long as the Ops process is running. If the user closes Ops or restarts the client device, you will need to re-configure the Bluetooth printer in Ops. In addition, the client provides a catch-all feature when the printer is not configured. If the user forgets to configure the printer, the Select Printer dialog box appears the first time a print job is attempted, and the user must perform steps 3 through 5.

Simphony version 2.7 with mTablet E Series

There is a one-to-one relationship between a tablet and a Bluetooth printer. In other words, after you identify and configure a Bluetooth printer in the EMC and pair it with a specific mTablet E Series workstation as the Print Controller Service Host, you cannot assign another mTablet workstation or Mobile MICROS handheld device to the same Bluetooth printer.

Supported printer hardware

- The EPSON P60 model works with Bluetooth printing.
- The Bixolon-SPP-R200II model works with Bluetooth printing with Simphony 1.6 MR6 or later and Simphony v2.x, using the **Printer Type** of **Epson Bluetooth Printer**.

See also

- Bluetooth Printer Bixolon-SPP-R200II Setup
- Mobile MICROS

Printing (Hardware)	Printing · Printers (EMC Module) · **Bluetooth Printing** · IP Printer · Order Device · Print Controller · Roll Printer · Slip Printer · Hardware Specs
Learning series: Printing	

Business Day

In food service, hotel, and casino environments, a **Business Day** refers to the begin/end times of a day of business.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Business Day vs. Calendar Day
- 2 Purpose of a Business Day
- 3 Business Days and Simphony
  - 3.1 Start of Day Rules

Business Day vs. Calendar Day

- A calendar day always begins at 12am.
- A business day could have any begin time; however, it is typical that a business day begins in the early morning hours (3am or 4am, perhaps).

Purpose of a Business Day

Business Days exist to include all the hours of a restaurant's operational hours. Usually, a business day ends when there is no business ("last call"). At 24-hour sites, business days often correspond to an early-morning shift change (if a large percentage of employees begin work at 6am, this might be the start of the site's business day).

Business Days and Simphony

In Simphony, a business day can be programmed to start automatically (every day at 4am, for instance) or manually (a night auditor manually begins the business day). See Start of Day for configuration information.

Start of Day Rules

Simphony has business rules to determine how and when a business day can begin, and which business day is beginning. The rules exist for both Automatic Start of Day and Manual Start of Day.

Note: Simphony prevents the same business day from starting twice. For instance, based on

Starting a new Business Day

- Start of Day cannot be run twice in 8 hours
- Start of Day cannot be run twice between midnight and noon
- Start of Day cannot be run twice between noon and midnight
- If a business day is scheduled to run automatically, it is not possible to start the business day manually via a PC Autosequence.

the rules discussed here, a site could start the business day for the 17th at 2pm on the 16th and run SOD again at 6am on the 17th. However, because the same business day (the 17th) is trying to start in both situations, an error will display: Cannot begin the same business day twice.

Which Business Day is Starting?

- Business Day calculation is based on noon-to-noon times
  - If SOD is run before noon, Simphony assumes the Business Day completed is for the previous calendar day. (If SOD runs at 3:05am on the 17th, the 16th is the Business Day that is closing, and the 17th is the Business Day being started.)
  - If SOD is run after noon, Simphony assumes the Business Day completed is for the current calendar day. (If SOD is run at 11:52pm on the 17th, the 17th is the Business Day that is closing, and the 18th is the Business Day being started.)

CAPMS Payment Card Driver Configuration Guide

General Information

About This Document

This document provides the steps necessary to implement the CAPMS payment card driver type for use with MICROS Simphony v2.6.

The Simphony payment configuration settings are dependent on the third party payment card software which the property is using ($$$ on the Net, CAPMS, Fusebox, or VisaD).

All aspects of the payment card driver configuration are maintained in the Enterprise Management Console (EMC) module within Simphony.

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Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version	Comments
A	September	2012	2.5.0	Configuration introduced with Simphony v2.5.
B	November	2012	2.5.1	Added support for non-tokenized messaging with Simphony v2.5 MR1.
C	July	2013	2.5.3	Updated document with instructions for new loadable payment driver, available with Simphony v2.5 MR3. Added Professional Services Procedures for Distributing Third Party Credit Card Driver Package (Appendix C).
D	January	2014	2.6.0	Updated document for v2.6. The Third Party Credit Card Driver Package procedures were moved to a stand alone document as they can be utilized by all third party payment card drivers.

Contents

To help you navigate the document, information is organized in sections and displayed in the following sequence:

Who Should be Reading This Document 4

What the Reader Should Already Know 4

Simphony Setup Procedures 5

Who Should be Reading this Document

This document is intended for the following audiences:

- MICROS Installers/Programmers/System Test Associates
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of POS terminology and concepts
- Working knowledge of the Microsoft Windows interface
- Understanding of basic network concepts

Simphony Setup Procedures

Before You Begin

Before configuring the CAPMS payment driver type, the following should be noted:

- Simphony v2.6 must be installed at the property.
- You must have access to the EMC module within Simphony.
- Any custom payment or device drivers that will be utilized must have been implemented. Please refer to the *Guide to Distributing Third Party Credit Card Driver CAL Packages* for instructions.

EMC Configuration

Overview

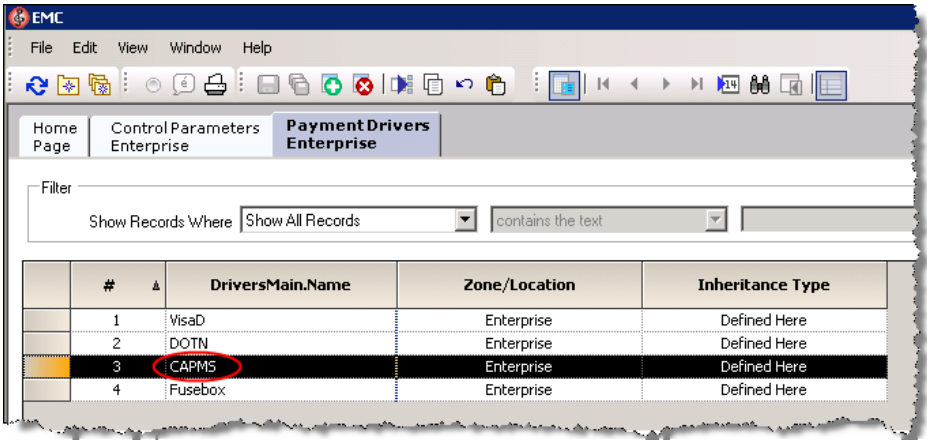
This section provides instructions to configure a CAPMS payment card driver for use with Simphony v2.6. All aspects of the payment card driver configuration are maintained in the EMC module within Simphony. First, the vendor gateway application must be installed by the vendor. Second, you will need to configure the payment card driver and payment card module, and then configure the screen/button design for Front of House (FOH) usage.

Payment Driver Configuration

Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Payment Drivers**.
3. Add a new record for the CAPMS driver using the green Insert Record button (if it does not already exist).



4. Open the new driver, and then click the link called '**Import from a file**'.
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**CAPMSPayment.dll**'.
6. Click the '**Open**' button.
7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:

Assembly/Class	
Assembly Name	CAPMSPayment.dll
Category And Type	
Class Name	Micros.Payment.CreditCardDrivers.CAPMSPaymentDriver
Description	**CAPMS Payment Driver**
Display Name	**FreedomPay**
Driver ID	**CAPMS**

- **Description -** This value describes the Payment Driver.
- **Display Name -** Enter the name of the third party driver development company. This value appears in the Driver display drop-down list.
- **Driver ID -** This is for internal use only. Use '**CAPMS**' unless instructed otherwise.

Common Driver Properties

9. In the Common Driver Properties section, enter information in the following fields:

Common Driver Properties	
Bank Identification Number	**1**
Batch Number	**1**
Merchant Number	**1**
Store Number	**1**
Terminal Number	**1**

- **Bank Identification Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.
- **Batch Number -** This value cannot be 0 (zero) or empty. Set to '**1**'.
- **Merchant Number** - This value cannot be empty. Set to '**1**'.

- **Store Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.

- **Terminal Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.

Transport Service Properties

10. In the Transport Service Properties section, enter information in the following fields:

Transport Service Properties	
Batching Host	**[See vendor for IP Address]**
Batching Host Port	**0**
Host Timeout	**30**
Primary Host	
Primary Host Port	**0**

- **Batching Host** - The IP Address of the machine where the vendor gateway application is installed at the Hosting or Enterprise level. Refer to the third party driver development company for the appropriate value.

- **Batching Host Port** - Refer to the third party driver development company for the appropriate value.

- **Host Timeout** - This value cannot be empty. The recommended value is '**30**' seconds. Setting this value to '**0**' (zero) will equal no timeout.

CAPMS Driver Properties

11. In the CAPMS Driver Properties section, enter information in the following fields:

CAPMS Driver Properties	
Enable Level2 Data	**False**
Enable RFID	**False**
Enable Shift4 Messaging	**True**
Enable Tokenization	**True**
Interface Name	**[See vendor for value]**
Message Version	**[See vendor for value]**
Non-Tokenized Authorization Reversal Method	**Expire**
Revenue Center Type	
Send Issue Number	**False**
Send Start Date	**False**

- **Enable RFID** - Must be set to '**False**' for CAPMS.
- **Enable Shift4 Messaging** - Must be set to '**True**' for CAPMS.
- **Enable Tokenization** - Select one of the following based upon the vendor configuration:
  - **True** - Enables use of tokenized messaging.
  - **False** - Utilizes standard non-tokenized messages.
- **Interface Name** - Refer to the third party driver development company for the appropriate value.
- **Message Version** - Refer to the third party driver development company for the appropriate value.
- **Non-Tokenized Authorization Reversal Method** - Only used when Enable Tokenization is set to 'False'. Select one of the following:
  - **Expire** - Do nothing with the authorization reversal request (default).
  - **Send** - Send authorization reversal request.

- **ZeroSale** - Send $0.00 sale as the authorization reversal request.

- **Send Issue Number** - Must be set to '**False**' for CAPMS.

- **Send Start Date** - Must be set to '**False**' for CAPMS.

12. Save your changes and close the Payment Drivers Enterprise tab.

Payment Device Configuration

In most cases the payment module will use devices (e.g., MSR, RFID) that are supported using the internal drivers for the input of payment card information. If this is the case, you may skip to the next section.

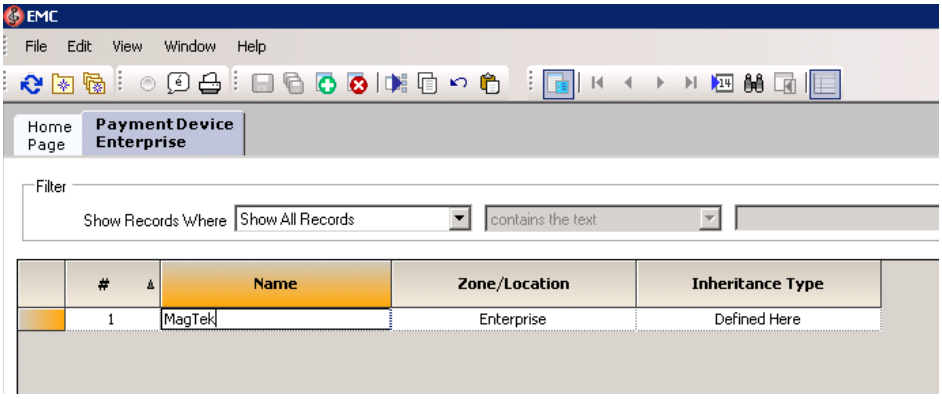
If the payment module will be utilizing a physical input device (MSR) that is not already supported as part of the Simphony POS, a custom device driver may have been created. A third-party device driver will be required to allow communications between the physical device and Simphony. Configure the device driver using the following instructions.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.

2. Navigate to **Setup tab | Payment Device**.

3. Add a new record for the device driver using the green Insert Record button (if it does not already exist).



4. Open the new driver, and then click the link called '**Import from a file**'.

5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**[3rdpartyprovider].dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:

- **Description -** This value describes the Device Driver.
- **Device ID -** This is for internal use only. It is recommended that this value match the device (e.g., Magtek350M).
- **Display Name -** This value appears in the Device display drop-down list (e.g., MagTek).

9. Save your changes and close the Payment Device Enterprise tab.

Payment Module Configuration

Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Payments**.
3. Click the Credit Card payment record to open. If a payment record for Credit Cards has not been created, add it using the green Insert Record button.
4. Click the link called '**Import from a file**'.
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**Micros.Payment.LoadableCreditCardModule.dll**'.
6. Click the '**Open**' button.
7. Select the **Driver** from the drop-down list. If a payment driver was created in the previous steps, the display name of the driver will be shown here.
8. Select the **Device** from the drop-down list. This will default to '**Internal**', which is the value to use for all MICROS devices. If a device driver was created in the previous steps, the display name of the driver will be shown here.
9. Click the '**Configuratio**n' tab.

Common Properties

10. In the Common Properties section, enter information in the following fields:

Common Properties	
Allow Manual Authorization Credit Card	**True**
Allow Partial Settlement On Batch	**False**
Data Lifetime Seconds	**7200**
Default UI Element	
Do Not Batch	**False**
Encrypt Data	**True**
Log Level	**ALWAYS**
Manual Card Data Entry Retries	**5**
Offline Authorizations	**1**
Prompt For Manual Card Data Entry	**True**
Retry Authorization Reversals On Batch	**False**
Run As Service	**False**

- **Allow Manual Authorization Credit Card** - This indicates whether manual authorization of credit cards is allowed. Must be set to '**True**' for all processors using the CAPMS driver.
- **Allow Partial Settlement On Batch** - Must be set to '**False**' for all processors using the CAPMS driver.
- **Do Not Batch** - Determines if the creation and settlement of the Batch will be performed within Simphony. Must be set to '**False**' for all processors using the CAPMS driver.
- **Encrypt Data -** Must be set to '**True**' for all processors using the CAPMS driver.
- **Manual Card Data Entry Retries -** This indicates the number of manual card retries that will be allowed. Must be set to at least '**1**'. Recommended value of '**5**'.
- **Offline Authorizations** - This indicates the number of offline authorizations allowed before the system will attempt to go online.
- **Prompt For Manual Card Data Entry** - This indicates whether manual card entry is allowed. Must be set to '**True**' for all processors using the CAPMS driver.

- **Retry Authorization Reversals On Batch** - Must be set to '**False**' for all processors using the CAPMS driver.
- **Run As Service** - Must be set to '**False**' for all processors using the CAPMS driver.

11. Save your changes and close the Payment Enterprise tab.

Property/Revenue Center Level Configuration

Configuration settings that are unique to the individual property or revenue center can now be defined.

1. In the Locations hierarchy, highlight the property module.
2. Navigate to **Setup tab | Payment Drivers**.
3. Double-click the '**CAPMS**' driver row to open.
4. Click the '**Override this record**' link, and then click the '**Yes**' button.
5. Click the '**Configuration**' tab.

Common Driver Properties

Ensure that you have the Value Added Reseller (VAR) sheet from a CAPMS payment processing vendor representative. The VAR sheet contains all of the property specific information, such as the Bank Identification Number, Merchant Number, Store Number, Terminal Number, and more.

6. If the values differ from those defined at the Enterprise level, then update the appropriate values based upon the VAR sheet. Otherwise, continue to the next step.

⊟ Common Driver Properties	
Bank Identification Number	**[See VAR sheet]**
Batch Number	**1**
Merchant Number	**[See VAR sheet]**
Store Number	**[See VAR sheet]**
Terminal Number	**[See VAR sheet]**

- **Bank Identification Number** - See VAR sheet for value.
- **Batch Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.
- **Merchant Number** - See VAR sheet for value.
- **Store Number** - See VAR sheet for value.
- **Terminal Number** - See VAR sheet for value.

Transport Service Properties

7. If the values differ from those defined at the Enterprise level, then update the appropriate values based upon the VAR sheet. Otherwise, continue to the next step:

Transport Service Properties	
Batching Host	**[Change if different from Enterprise level]**
Batching Host Port	**0**
Host Timeout	**30**
Primary Host	**[See vendor for IP Address]**
Primary Host Port	**0**

- **Batching Host** - If the value differs from the Batching Host defined at the Enterprise level, then update the appropriate value here based upon the VAR sheet value. Otherwise, do not change this value.
- **Batching Host Port** - If the value differs from the Batching Host Port defined at the Enterprise level, then update the appropriate value here based upon the VAR sheet value. Otherwise, do not change this value.
- **Host Timeout** - This value cannot be empty. The recommended value is '**30**' seconds. Setting this value to '**0**' (zero) will equal no timeout.
- **Primary Host** - The IP Address of the machine that runs the vendor gateway application at the property.

- **Primary Host Port** - Port of the machine for Primary Host above.

8. Save your changes and close the Payment Drivers tab for your current level in hierarchy.

Configure Autosequence

The PC Autosequence feature may optionally be used to set up automatic event tasks, such as nightly batching. Once the PC Autosequence event has been created, it can be scheduled to run repeatedly at specific frequencies or time intervals.

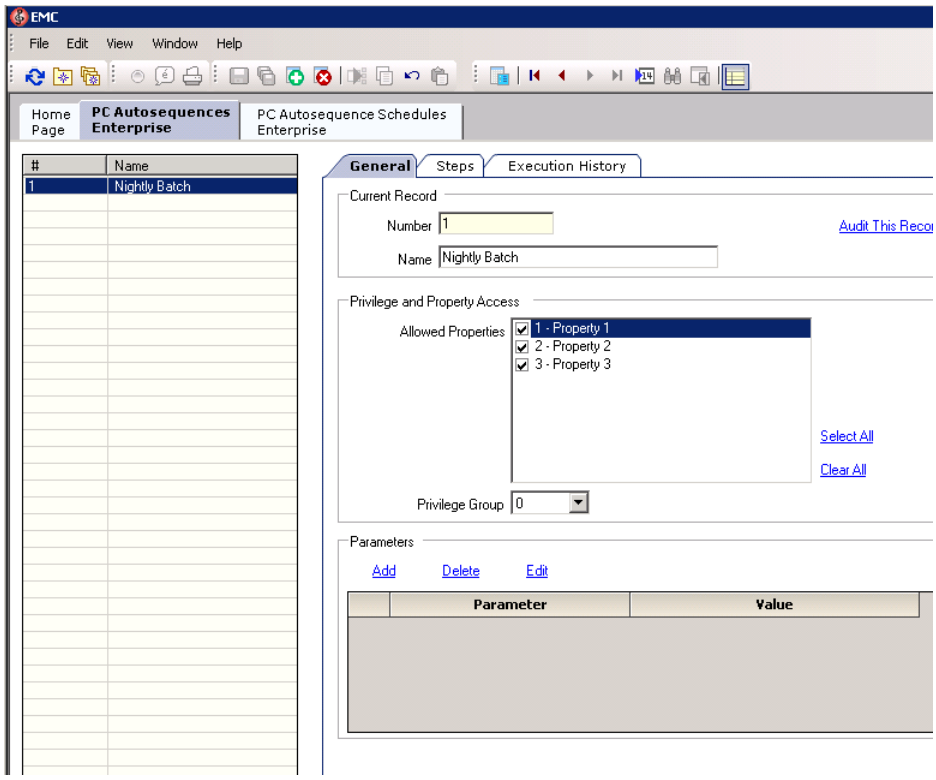
Create Autosequence Event

Autosequences may only be configured at the Enterprise level.

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Configuration tab | PC Autosequences**.
3. Add a new record for the autosequence event using the green Insert Record button (if it does not already exist).
4. Double-click on the row to open the new autosequence record.
5. Click the '**General**' tab.

Privilege and Property Access

6. In the Privilege and Property Access section, select information for the following fields:



- **Allowed Properties** - Check (enable) each property that is to be included in the autosequence event run.
- **Privilege Group** - If desired, select the employee group that will be granted privileges to run the autosequence event.

Parameters (optional)

To optionally restrict the execution of the autosequence event, complete the steps in the section below.

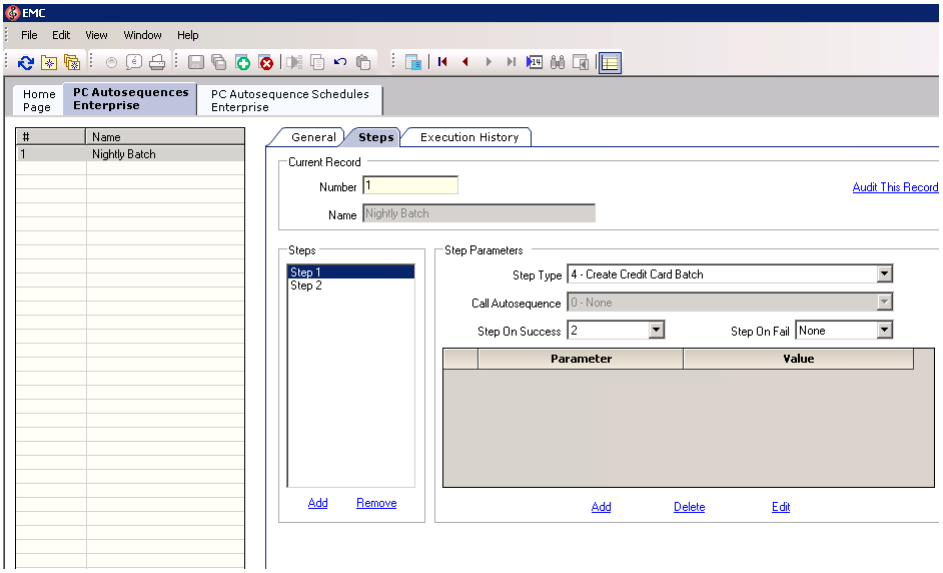
7. In the Parameters section, click the '**Add**' link.

8. Add the desired parameter(s) with values.

Autosequence Event Steps

9. Click the '**Steps**' tab.

10. Under the Steps section, click '**Add**' to add step 1 of the autosequence event.



11. In the Step Parameters section, select the **Step Type** from the drop-down list.

12. Under the Steps section, click '**Add**' again to add step 2 of the autosequence event.

13. Select the **Step Type** from the drop-down list.

14. Repeat to add each step required to run the autosequence event.

15. For each step, select the outcomes:

- **Step on Success** - Select the step number that should occur next if a step succeeds. For example, after step 1 runs successfully, then proceed to step 2.
- **Step on Failure** - Select the step number that should occur next if a step fails. For example, if step 1 fails, do not proceed with any other steps.

16. Once all steps have been added, save your changes and close the PC Autosequences Enterprise tab.

PC Autosequence Schedules

17. In the Locations hierarchy, highlight the Enterprise module.

18. Navigate to **Configuration tab | PC Autosequence Schedules**.

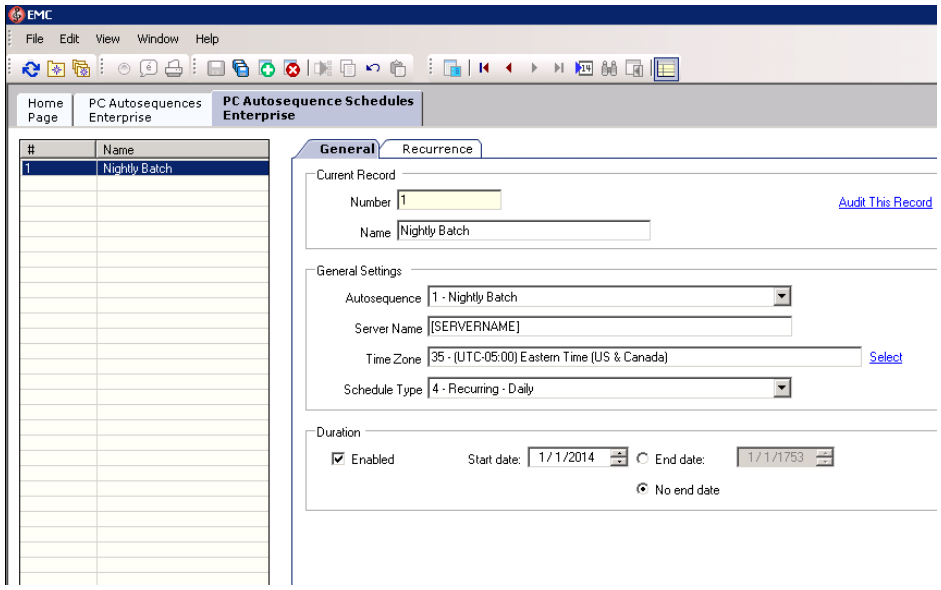
19. Add a new record for the autosequence schedule using the green Insert Record button (if it does not already exist).

20. Double-click to open the new autosequence schedule record.

21. Click the '**General**' tab.

General Settings

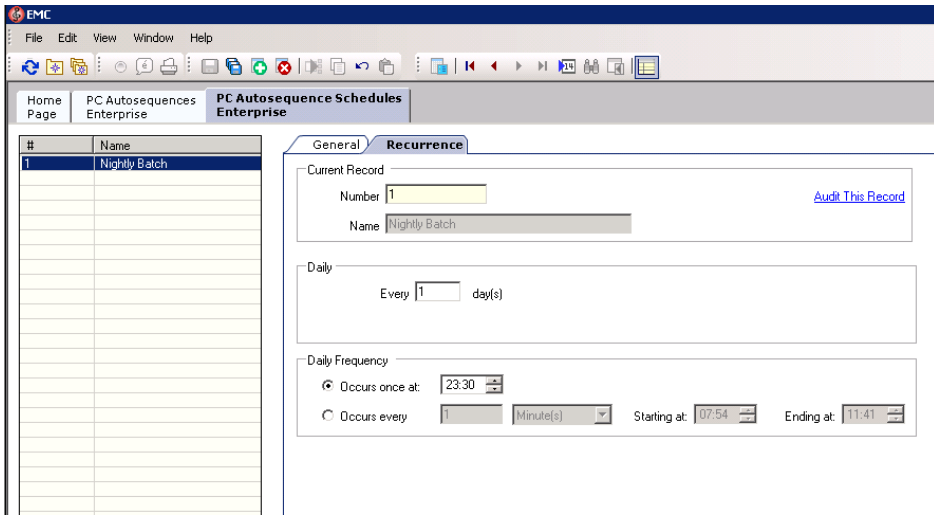
22. In the General Settings section, select information for the following fields:



- **Autosequence** - Select the desired autosequence event from the drop-down list.
- **Server Name** - Enter the name of the server located at the Hosting Center.
- **Time Zone** - Select the time zone of the Hosting Center.
- **Schedule Type** - Select the frequency for the autosequence event.
- **Duration** - The '**Enabled**' box must be checked in order for the autosequence event to run. Also, select the Start and End dates for the autosequence event.

Recurrence

23. Click the '**Recurrence**' tab.



24. In the Daily section, enter the number of day(s) for the autosequence event to reoccur. For example, to run the event daily, set this value to Every 1 day(s).

25. In the Daily Frequency section, set the time(s) for the autosequence event to run.

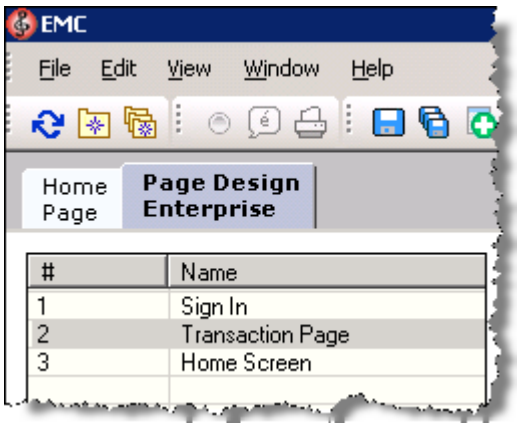
26. Save your changes and close the PC Autosequence Schedules Enterprise tab.

Screen Design Configuration

The instructions below explain how to set up the FOH screen and button(s) for use with the payment card driver.

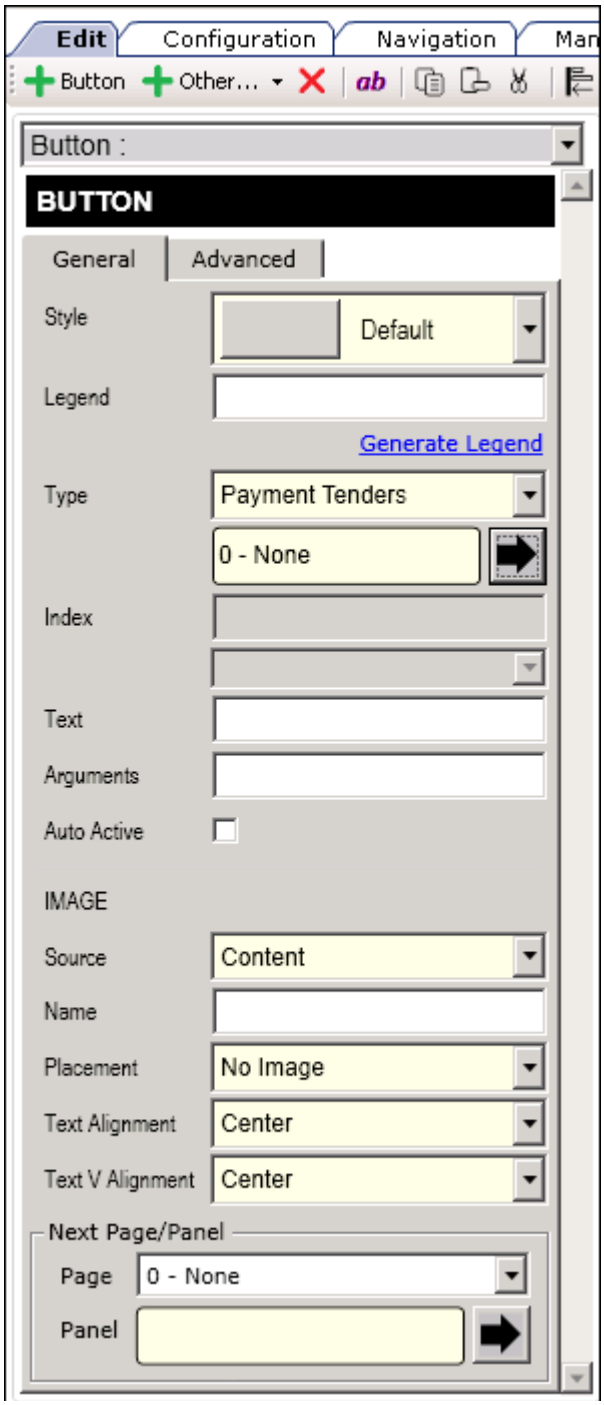
1. Open the EMC application in Simphony and log in.
2. Highlight the enterprise module.
3. Navigate to **Configuration tab | Page Design**.
4. Double-click the row of the desired page/screen to open it.

***Note**: The screenshots below depict a Transaction Page as the example. Your system will likely have a different page or screen name for the buttons.*



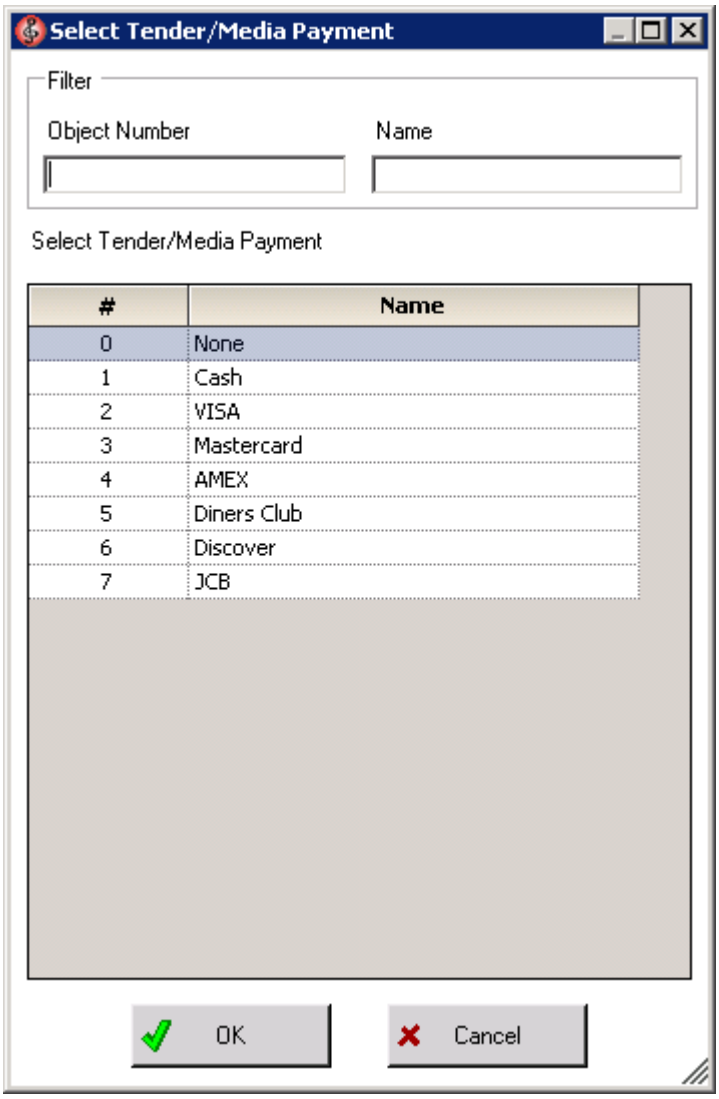
5. On the Edit tab, click '**Payments**'.
6. Click the Insert (+) button.

7. In the General tab select '**Payment Tenders**' from the Type drop-down.



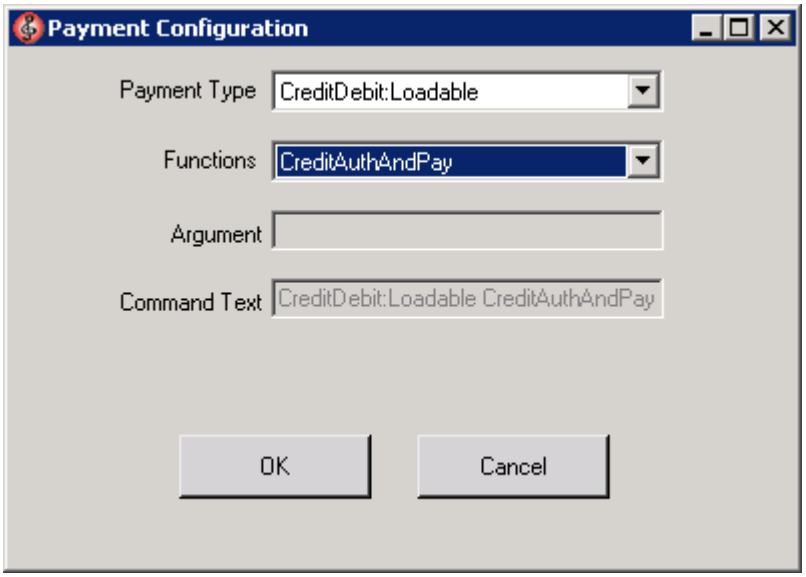
8. Directly under the Payment Tenders drop-down, click the black arrow.

9. On the *Select Tender/Media Payment* window, select '**None**' or the desired payment tender, and then click the '**OK**' button.



***Note**: If you want all types of credit cards to be used, select 'None'. Otherwise, select the desired payment tender and repeat steps 9-13 for each type of payment tender.*

10. On the *Payment Configuration* window, select '**CreditDebit:Loadable**' for the Payment Type and your desired function in the Functions drop-down list. Click the '**OK**' button.



11. Position and size the button wherever you want to place it on the FOH screen.

12. In the Legend field, type the name of the button.

13. Repeat for any additional supported functions.

14. Save your changes and close the Page Design Enterprise tab.

15. Restart the Ops client(s) in order for the screen design changes to display on the workstation(s).

Check Number

In MICROS products, every transaction is associated with a **Check Number**. In Simphony, the check number is always between 1 and 9999 (a 4-digit number). In general, check numbers start in numeric order: if a user begins check number 1007, the next check number to begin for the RVC is 1008.

This article belongs to the MICROS **Important concepts** category.

Contents

- 1 Options
  - 1.1 Operator Assigns Check Numbers
- 2 Configuration
- 3 See also

Options

Operator Assigns Check Numbers

There is a Revenue Center Parameter option bit, **[Operator Assigns Check Numbers]**. When this option is enabled, the operator assigns the check number, instead of the check automatically being started with the next available check number. This option is designed for sites that have their own guest checks with pre-printed numbers (instead of using roll printers). Typically, revenue centers are programmed with the option disabled, and the check numbers are generated automatically.

Configuration

Revenue Center Parameters includes settings for "Min Guest Check #" and "Max Guest Check #". When check numbers are generated automatically, after the "Max Guest Check #" is reached, the next check number is the "Min Guest Check #". For example, consider the following scenario (which is a typical configuration):

- Minimum Check # = 1000
- Maximum Check # = 9999

In this scenario, after check 9999 has been started, the next check number will be 1000.

To keep check numbers unique per Revenue Center, installers sometimes assigned an exclusive range of check numbers per RVC. For example, in Revenue Center #1, check numbers could range from 1000 to 1999. In Revenue Center #2, check numbers could range from 2000 to 2999. This programming scenario is generally used only for small properties where all the Revenue Center numbers are less than 10.

Check Operator vs. Transaction Operator

In MICROS, there are two terms that refer to an employee accessing a check. A **Check Operator** (sometimes called the **Check Employee**) is the person who began the check (or to whom it was transferred), while the **Transaction Operator** is the person who is accessing the check now.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Scenario
- 2 Reporting
  - 2.1 #6 - Post Totals and Tender to Transaction Operator
    - 2.1.1 Checked
    - 2.1.2 Unchecked
  - 2.2 #7 - Post Tender (only) to Transaction Operator
    - 2.2.1 Checked
    - 2.2.2 Unchecked
- 3 See also

Scenario

1. Joe begins a check
   - Joe is the Transaction Operator and the Check Operator
2. Joe service totals the check.
   - Joe is the Check Operator
   - There is no transaction operator (there is no active transaction after a service total)
3. Bob picks up the check and rings items.
   - Joe is the Check Operator
   - Bob is the Transaction Operator
4. Mary picks up the check and rings items.
   - Joe is the Check Operator
   - Mary is the Transaction Operator
5. Jane signs in and transfers the check from Joe to herself.
   - Jane is now the Check Operator and the Transaction Operator

Reporting

Two Revenue Center Parameter Posting and Control option bits control which operator receives the totals — check operator or transaction operator. Note that these examples assume that employees are allowed to "pick up other employees' checks". Also note that there are really just three scenarios:

1. Neither bit is checked — all sales and tenders post to the check operator

2. #6 is checked (and #7 by default) — all sales and tenders post to the transaction operator
3. #7 is checked (only) — all sales post to the check operator, but tenders post to the transaction operator

#6 - Post Totals and Tender to Transaction Operator

Select this option to post sales totals, tenders, and tips to the transaction operator's report totals. Disable this option to post sales totals, tenders, and tips to the check operator. NOTE: Enabling this option could prevent individual Employee Financial Reports from balancing. Also note that if this option is selected, transactions in this Revenue Center will be calculated as if the next option, "Post Tender To Transaction Operator", is selected as well, even if it is not checked. ***Note:*** *When this option is checked, #7 is checked and disabled by default, to ensure the proper configuration.*

Checked

With this option checked, the following scenario occurs:

1. Joe begins a check, and adds $25.00 of items.
    - The $25.00 in sales go to Joe.
2. Bob picks up the check and adds $10.00 of items
    - The $10.00 in sales go to Bob.
3. Mary picks up the check and pays it
    - The $35.00 of tender go to Mary.

The reason for the note, *enabling this option could prevent individual Employee Financial Reports from balancing* becomes a little more obvious after reading through this scenario. Bob's report, for example, will show $10 of sales, with no checks begun or paid. That may look a little odd.

Unchecked

With this option unchecked (and #7 unchecked), the following scenario occurs:

1. Joe begins a check, and adds $25.00 of items.
    - The $25.00 in sales go to Joe.
2. Bob picks up the check and adds $10.00 of items
    - The $10.00 in sales go to Joe.
3. Mary picks up the check and pays it
    - The $35.00 of tender go to Joe.

When this option is disabled, it allows users to access Joe's check while still posting sales to Joe. Often, this is the configuration, and only managers can pick up other people's checks.

#7 - Post Tender (only) to Transaction Operator

Select this option to post tenders and tips to the transaction operator's tracking group totals. Disable this option to post tenders and tips to the check operator's tracking group totals. Note: If the previous option, "Post Totals to Transaction Operator", is selected, transactions in this Revenue Center will be calculated as if this option is enabled, even if this option is not checked. ***Note:*** *When #6 is checked, this option is checked and disabled by default, to ensure the proper configuration.*

Checked

With this option checked, the following scenario occurs:

1. Joe begins a check, and adds $25.00 of items.
    - The $25.00 in sales go to Joe.
2. Bob picks up the check and adds $10.00 of items
    - The $10.00 in sales go to Joe.
3. Mary picks up the check and pays it
    - The $35.00 of tender go to Mary.

With this option enabled (and #6 isn't enabled), only the payment goes to the Transaction operator.

Unchecked

With this option unchecked, the following scenario occurs:

1. Joe begins a check, and adds $25.00 of items.
    - The $25.00 in sales go to Joe.
2. Bob picks up the check and adds $10.00 of items
    - The $10.00 in sales go to Joe.
3. Mary picks up the check and pays it
    - The $35.00 of tender go to Joe.

When this option is disabled, it is the same as the scenario that #6 is disabled — all sales and Tenders will post to Joe, the check operator.

Combination Pricing Discount

Contents

- 1 Understanding combination pricing discounts
- 2 Configuring combination pricing discounts
  - 2.1 Configuring discount interaction (exclusivity)
- 3 Using combination pricing discounts
- 4 See also

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Understanding combination pricing discounts

A combination pricing discount is a type of automatic discount or automatic coupon discount that allows a single price to be charged for multiple items when they appear on a check at the same time. This type of discount is used in combo meal scenarios such as *burger, fries, and soda are 3.25.*

Configuring combination pricing discounts

1. Navigate to *EMC > Enterprise / Property / Zone > Configuration > Discounts > Auto*.
2. Select **[4 - Combination Pricing]** from the drop-down list.
3. Enter information in the following fields:

Field	Description
Priority	This field determines the order in which discounts are calculated. This field is blank (0) for all discounts by default, meaning that discounts are calculated at the same time. When using this field, the workstation calculates all discounts in priority 1, then in priority 2, and so on. Priority 0 discounts are calculated last. The Priority field allows the discount engine to determine which discount to apply quicker, thus reducing CPU time on the workstation.
Trigger MI Groups	Select the menu item groups that belong to this combination discount. This discount is used in scenarios such as *Fries, Drink, and Burger for $3.25*. You can configure a maximum of four trigger menu item groups for combination pricing discounts. A Trigger MI Group can be used more than once (for example, if the combo meal includes two sides). However, this is not the typical configuration.
Amount Substitution	Enter the price to be charged for this combo meal.
Max Count	Enter the maximum number of combo meals that can be ordered per check. In general, this field is set to 0 to allow an unlimited amount of combo meals on a single check.

Configuring discount interaction (exclusivity)

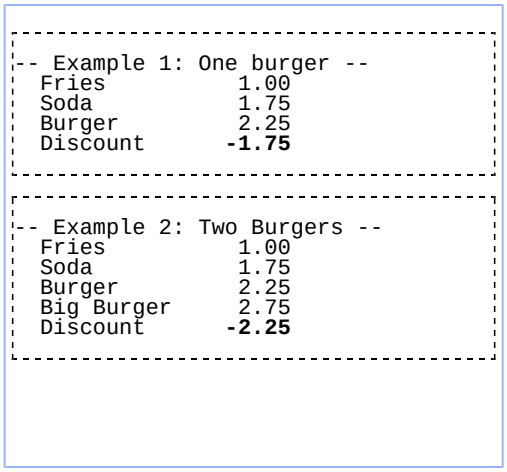
For information about configuring a discount to interact with other discounts, see Discount Exclusivity.

Using combination pricing discounts

The customer gets the best deal when the system performs the discount calculation. The first example shows the discount amount after a "Burger" item is ordered. All three items are discounted by $1.75, making the price $3.25.

If the operator then adds a Big Burger item for a higher price ($2.75 in the example), the discount recalculates to include the best deal for the customer. Because the best deal is to discount the Big Burger and not the Burger, the new discount is $2.25, making the Big Burger, Fries, and Soda a combined price of $3.25.

Combination pricing discounts appear on customer receipts based on the configuration of the Item Discount option. Typically, combination pricing discounts are configured with option [3 - This is an Item Discount] unselected, so the discount appears as one total instead of as individual discounts per item.



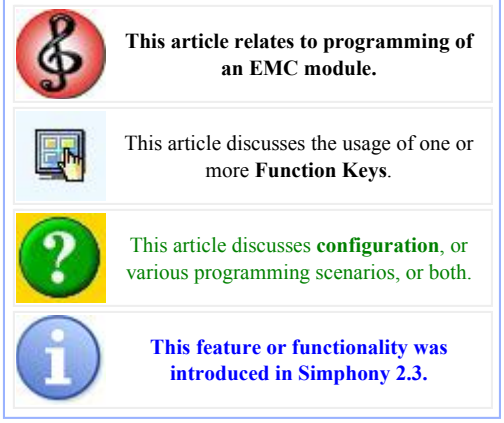
```
-- Example 1: One burger --
  Fries           1.00
  Soda            1.75
  Burger          2.25
  Discount       -1.75
```

```
-- Example 2: Two Burgers --
  Fries           1.00
  Soda            1.75
  Burger          2.25
  Big Burger      2.75
  Discount       -2.25
```

See also

Discounts	Discount · Manual Discount · Automatic Discount · Automatic Coupon Discount · Automatic Discounts for Decimal Quantity Menu Items · **Combination Pricing Discount** · Item Price Substitution Discount · Quantity Threshold Discount · Sales Price Discount · Total Price Threshold Discount · Discount Engine · Discount Exclusivity · Discount NLU · Menu Item Group · Revenue Center Group
Learning series: Discounts	

Combo and Fixed Price Meals



Contents

- 1 Understanding combo meals and groups
- 2 How-to
- 3 Configuring fixed price meals
- 4 Ordering combo meals
- 5 See also

Understanding combo meals and groups

A **combo meal** consists of two or more menu items grouped together in combo meal groups and sold to the customer for a single price. Quick service restaurants typically sell combo meals to increase business by packaging the most frequently requested menu combinations (for example, hamburger, fries, and a drink) and offering them for a lower price than à la carte items.

For example, Figure 1 shows a meal named Combo 1. This combo meal record is configured with a primary menu item called Combo Sandwiches and a couple of additional Combo Groups (shown as Combo Drinks and Combo Side Items).

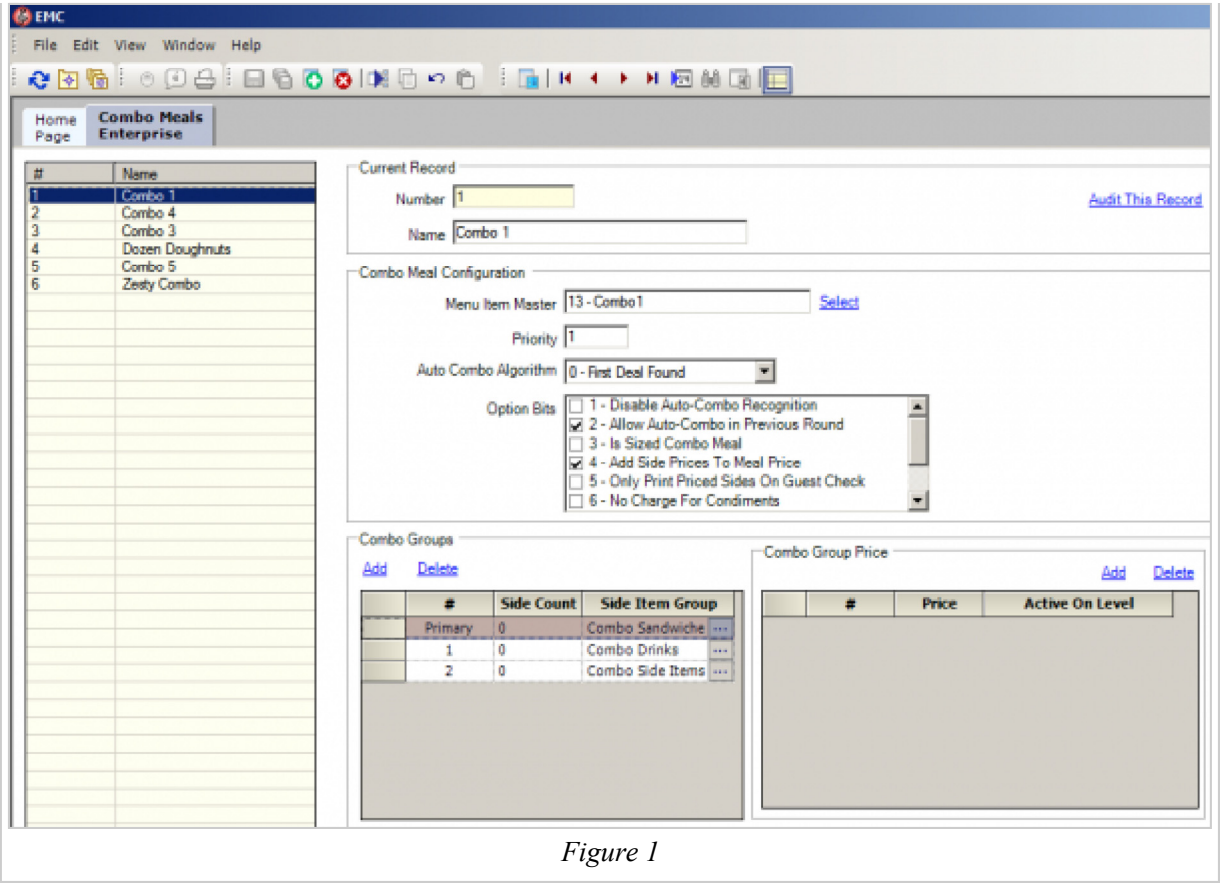


Figure 1

How-to

- Configure combo meal groups
- Configure combo meals
- Configure additional combo meal options
- Configure combo meal pages
- Configure combo meal function keys

Configuring fixed price meals

You can configure fixed price meals (FPMs) like combo meals. Use the Combo Meal Groups module to assemble required items for a FPM, and assign alternate groups to allow guests to substitute items.

- There is no restriction on the number of FPMs. The operator can order multiple meals on the same seat.
- If the parent menu item increments the seat number, ordering multiple meals adds them to different seats (for example, three pre-dinner specials).
- There is no restriction on the number of side items (courses).
- The sides (courses) can default to a placeholder menu item that the operator replaces in a later round.
- Placeholder menu items can show or hide in the check detail area.

Ordering combo meals

The following table shows the steps required to order combo meals based on the methods used to order a combo meal.

Follow these steps to use the combo methods on the right	Combo Methods			
	Order each Menu Item	**Use Combo Key or Auto Combo key**[a]	**Operator Manually Combines Items**	**Workstation Automatically Combines Items**
Enter à la carte menu items		1	1	1
Press a combo parent menu item key such as **[Burger Combo]** or **[Dozen Donuts]**	1			
Select the primary combo item at the workstation prompt [b]	2			
Highlight the main menu item from the check detail area		2 [e]	2	
Highlight the side item(s) from the check detail area			3	
Press the **[Combo]** or **[Auto Combo]** function key		3	4	2
Select the side combo items at the workstation prompt(s) [b]	3	4		
Confirm the proposed combo(s)			5 [c]	3
Obtain manager authorization [d]			6	4

Notes:

[a] - This process assumes that the Revenue Center Parameters option **[Allow Auto Combo Meal Recognition with the Combo key]** is deselected.

[b] - If only one item exists in the combo meal group, or if an item is the default item for the given Order Type, the workstation automatically enters the item for the combo meal group.

[c] - This step only applies when including previous round items in the selection.

[d] - Authorization is only required with previous round items and the operator is unable to accept them.

[e] - Highlighting is unnecessary if the à la carte item was the last item ordered.

Combo and Fixed Price Meals

Contents

- 1 Understanding combo meals and groups
- 2 How-to
- 3 Configuring fixed price meals
- 4 Ordering combo meals
- 5 See also

This article relates to programming of an EMC module.

This article discusses the usage of one or more **Function Keys**.

This article discusses **configuration**, or various programming scenarios, or both.

This feature or functionality was introduced in Simphony 2.3.

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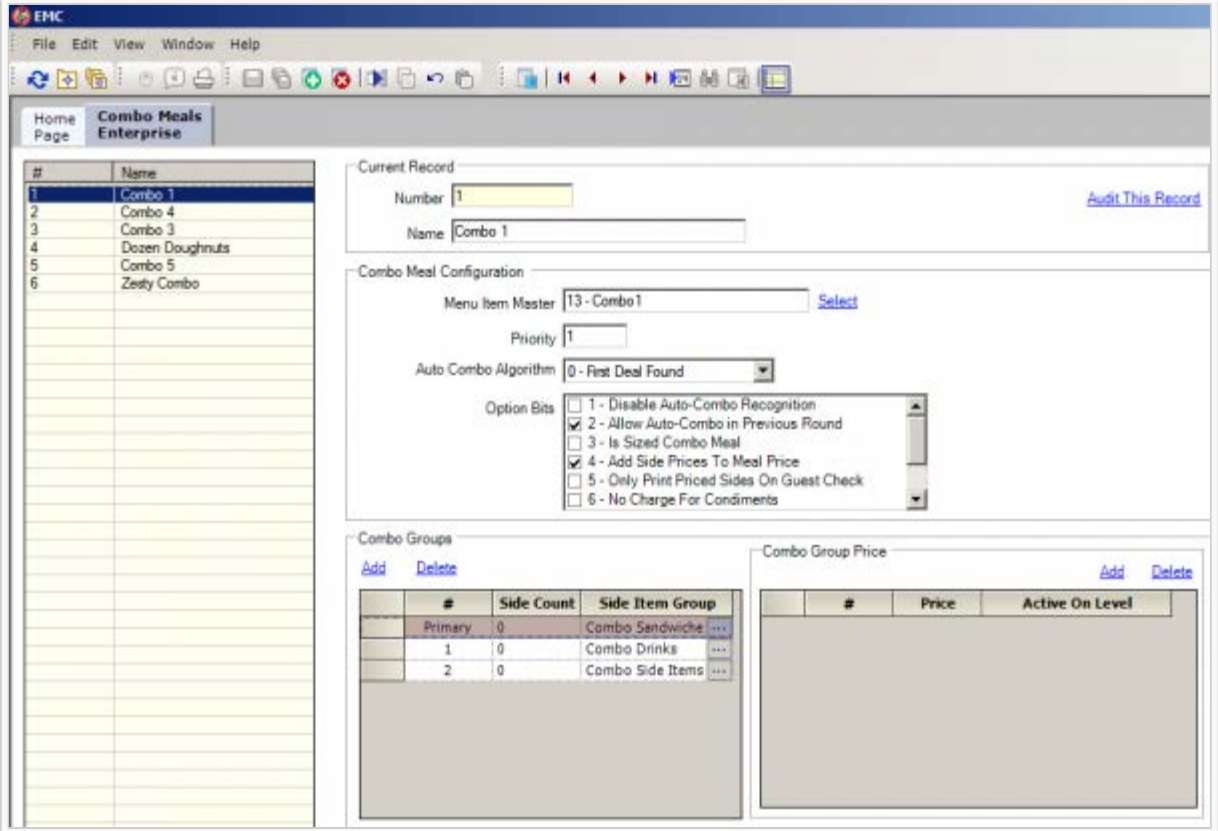

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See also

Menu Items	Menu Items (overview) · Adding a Menu Item · Adding a Menu Item 2x · Combo Meal · **Combo and Fixed Price Meals** · Menu Item Availability · Menu Item Class · Menu Item Definition · Menu Item Distribution · Menu Item Field Level Security Setup 2x · Menu Item Master · Menu Item Maintenance · Menu Item Price · Open-Priced Menu Item · Weighed Menu Item
Learning series: Menu Items	

Combo Meal Function Keys

Operators can use the following function keys with combo meals:

Auto Combo
: This key allows the operator to create a combo meal(s) from existing menu items.

Combo
: When the operator uses this key, the selected item or the last item on the check become a combo meal. The item must be a primary combo item. For example, if the combo meal is a burger with fries and a drink, the burger item must be the highlighted item or the last item ordered prior to pressing this key.

Combo Alternate Side
: Allows the operator to substitute a combo meal side with a selection from another combo meal group (for example, when a customer orders an appetizer instead of an entree in a combo meal).

Combo Bulk Order
: Allows the operator to order multiple combo meals at a time. The operator must meet each combo's side item requirements before moving on to order the next combo's side items.

Combo Multi Selection
: Allows the operator to select existing menu items to combine into a combo meal. This function shows the check details in a window, which allows the operator to select individual items to make up the combo meal. This gives the operator greater control in determining what is included in the combo meal.

Un-Combo
: This function separates an existing combo meal into individual à la carte items (non-combo pricing takes effect).

Type - Combo Order Size
: Selecting this key changes the order size before ordering the combo meal.

Type - Combo Size 1-4
: These keys change the combo size after ordering the combo meal. Using this key causes the workstation to resize the selected combo meal or combo meal side item to selected sizes 1 through 4. If the operator does not select an item, the last item on the check is resized.

See also

- Combo and Fixed Price Meals
- Configuring combo meal groups
- Configuring combo meals
- Configuring combo meal pages
- Configuring additional combo meal options

Condiment Prefixes

This article discusses the usage and configuration of the Condiment Prefixes feature.

Contents

- 1 Overview
  - 1.1 EMC Configuration
    - 1.1.1 Pre-Configuration
      - 1.1.1.1 Configure Condiment Sets
      - 1.1.1.2 Configuring Menu Item Definition Sequence
      - 1.1.1.3 Assign Condiment Set to Menu Items
    - 1.1.2 To configure Condiment Prefixes
      - 1.1.2.1 Insert Condiment Prefix Menu Items
      - 1.1.2.2 Insert Condiment Prefix Menu Item Class
      - 1.1.2.3 Turn on Condiment Prefix functionality
      - 1.1.2.4 Add CPF Buttons to Page Design
      - 1.1.2.5 Turning Off Condiment Prefixes in the Condiment Orderer
- 2 See also

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

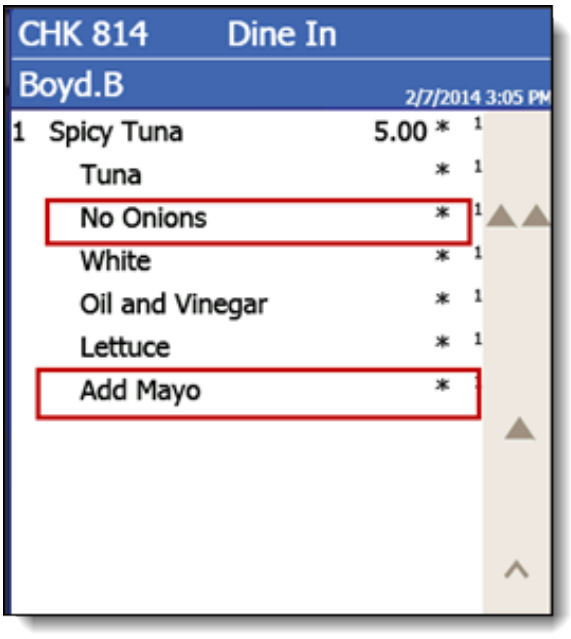
This article discusses functionality that relates to **Simphony v2.x**.

This feature or functionality was introduced in Simphony v2.6.

This article discusses functionality that relates to **Printing**.

Overview

Simphony now provides the ability to insert Condiment Prefixes. Many establishments allow customers the ability to modify Menu Items –they may add, remove, increase and decrease the number of Condiments that is on the Item. The Condiment Prefixes feature inserts prefixes such as 'NO', 'ADD', 'EXTRA', etc. before the Condiment on the Guest Check, Order Devices and Customer Receipts so that the Operator, server, kitchen staff and the customer may explicitly see the changes made to a default Condiment. This provides helpful preparation instructions to the kitchen staff and helps to eliminate order confusion.



EMC Configuration

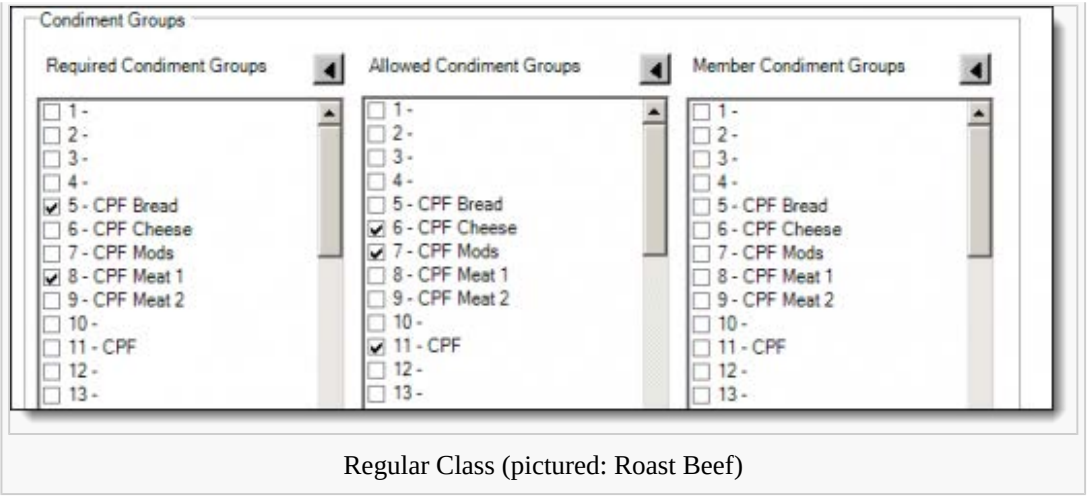
Pre-Configuration

Before setting up Condiment Prefixes, the foundation must be in place in order to necessitate the use of the feature. The following will detail an example of that environment.

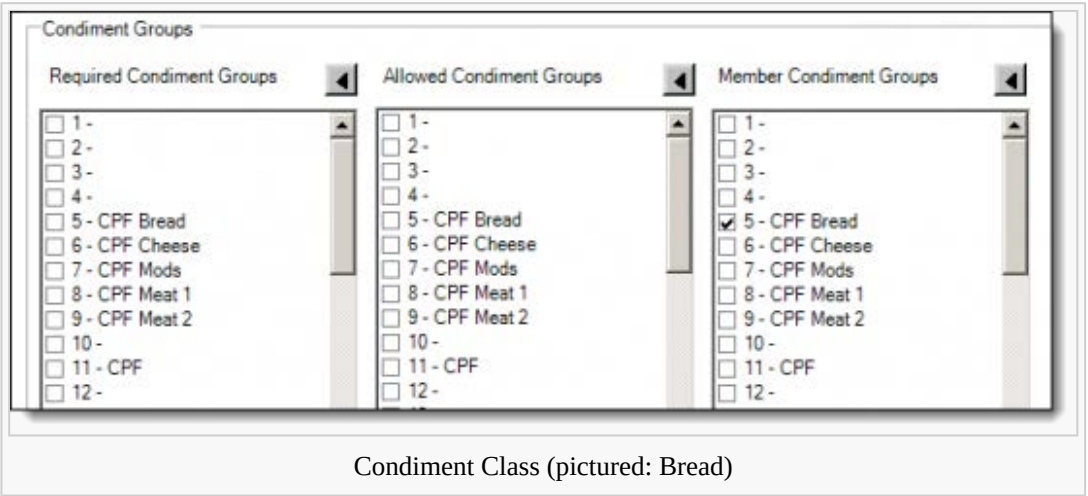
1. Navigate to the *EMC-> Enterprise level-> Configuration-> Menu Items-> **Menu Item Maintenance***.
2. Create master, definition and price records for all, except where detailed.

Menu Item	Class Name	Menu Item Type	Number of Definitions	Price Record?
Roast Beef Sandwich	Roast Beef	Regular	1	Y - 6.99
Ham & Turkey Club	Club	Regular	1	Y - 6.99
Tuna Wrap	Wrap	Regular	1	Y - 6.99
Roast Beef	Meat 1/Meat 2	Regular	2	N or $0
Turkey	Meat 1/Meat 2	Condiment	2	N or $0
Ham	Meat 1/Meat 2	Condiment	2	N or $0
Pastrami	Meat 1/Meat 2	Condiment	2	N or $0
Lettuce	Mods	Condiment	1	N or $0
Tomato	Mods	Condiment	1	N or $0
Onion	Mods	Condiment	1	N or $0
American Cheese	Cheese	Condiment	1	N or $0
Cheddar Cheese	Cheese	Condiment	1	N or $0
Provolone Cheese	Cheese	Condiment	1	N or $0
Wheat bread	Bread	Condiment	1	N or $0
White bread	Bread	Condiment	1	N or $0
Asiago Cheese Bread	Bread	Condiment	1	Y - $0.75

- All Regular Classes must be set to either ‘Require’ or ‘Allow’ the various Condiment Groups. For example, the Menu Item Class of Roast Beef can Require a meat and a bread choice and Allow cheeses and modifiers.
- All Condiment Classes must be set to the appropriate Member groups.



Regular Class (pictured: Roast Beef)



Condiment Class (pictured: Bread)

Configure Condiment Sets

Condiment Sets are a way to associate groups of condiments with a regular Menu item. For example, a Roast Beef sandwich can automatically come with rye bread, cheddar cheese and onions. Together they would be a default condiment set.

1. Navigate to the *EMC-> Enterprise level-> Configuration-> Menu Items-> **Condiment Sets***.
2. Insert a New Record.
3. In the Form View of the newly added Item, under the Condiments section, click the **Add** link.
4. Click the ellipsis button in the newly added record under the **Menu Item** column and select the desired Condiment.
5. Repeat as necessary to complete the Default Condiment Set.

If desired, enable the **[1 - Persist On Plain]** option for a Menu Item by clicking the ellipsis button in the **Options** column to have the selected Condiments remain on the Menu Item even when Operator modifies the Menu Item to be 'Plain'. When working on the Simphony client, the user has the ability to remove all modifications made to a Menu Item by utilizing the PLAIN functionality, returning it to its default appearance. By selecting the **[1 - Persist On Plain]** option for a Condiment in the Menu Item set, the system will not remove that Item from the screen when the PLAIN functionality is triggered.

The Context Sensitive Help (CSH) text for the **[1 - Persist On Plain]** option reads as follows:

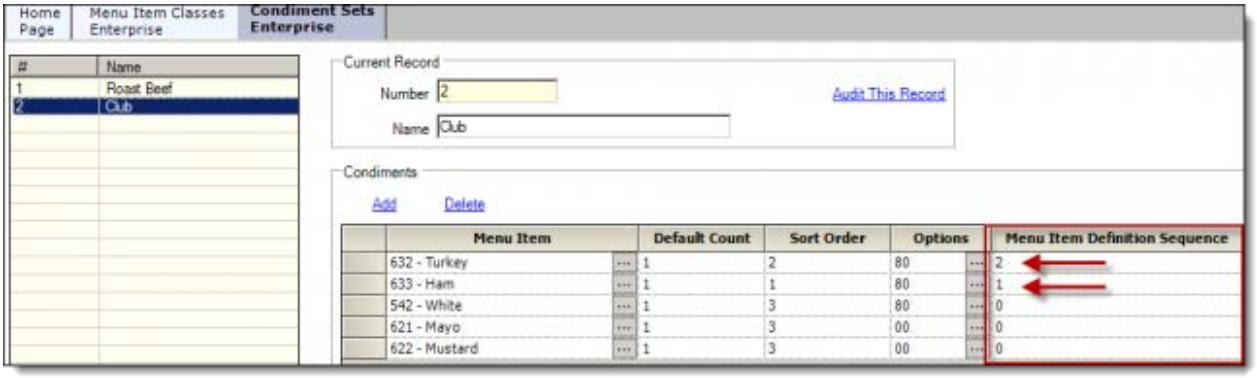
> *Enable this option if the selected condiment should remain if the menu item is modified to be Plain. When this option is disabled for a condiment, then it will be removed when Plain is selected. For example, when you select Plain on a*

bacon cheeseburger, the bacon and the cheese are not to be removed.

Configuring Menu Item Definition Sequence

The Menu Item Definition Sequence is a feature that was introduced in Simphony v2.5 MR5 HF1 that allows targeting of a specific Menu Item Definition. Because of the market desire to add multiple Condiments of the same type to a single Regular Menu Item (ex: Ham & Turkey, Ham & Ham or Turkey & Turkey), it is necessary to enable condiment switching within a specific set of definitions. This is the reason each meat choice has two definitions associated with the master record – so that a Ham choice and a Turkey choice exist in both groups, facilitating that effect.

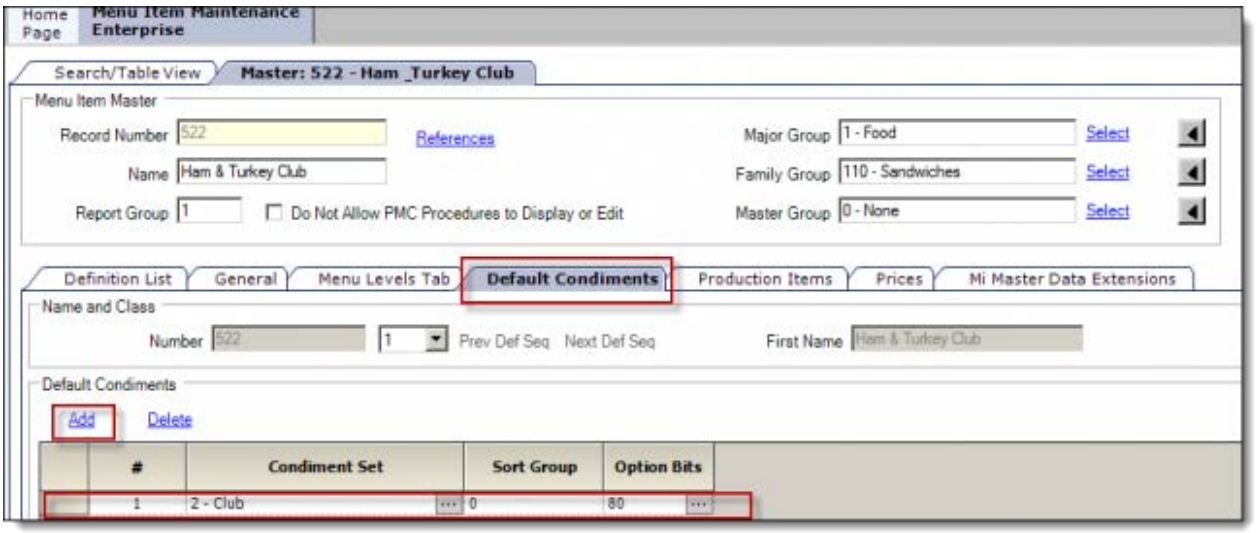
1. Navigate to the *EMC-> Enterprise level-> Configuration-> Menu Items-> Condiment Sets Enterprise-> **Menu Item Definition Sequence.***



2. Use the MI Definition Sequence numerical boxes to target the definition of each Menu Item.

Assign Condiment Set to Menu Items

In order to associate the Default Condiment Set with the Regular Menu Item, return to the Menu Item Definition.



1. Navigate to the *EMC-> Enterprise level-> Configuration-> Menu Items-> **Menu Item Maintenance***
2. Open the desired Regular Menu Item.
3. Enter Form View within the Menu Item Definition (pictured above).
4. Click the **Default Condiments** tab.
5. In the Default Condiments section, click **Add**.
6. Click the ellipsis … button in the newly added record and select the desired Condiment Set.

7. Enable options **[1 - Display when in default state]** and **[2 - Charge for entire sales count]**.

The CSH text for each option reads as follows:

1 - Display when in default state

When turned OFF, condiments will not display in the check detail, will not be sent to KDS or Order Device printer, will not print on the customer receipt/guest check, even if the print class is set to print to KDS and Order Device printer, customer receipt/guest check. When turned on the default condiment will display. If a default condiment is not in its default state (e.g. default is 1 slice of cheese, server has entered 3 slices of cheese) it will always display.

2 - Charge for entire sales count

When turned off the customer will only be charged when the count for the default item exceeds its default count. For example, if a burger comes with 2 slices of cheese then the customer will not be charged when there are 1 or 2 slices of cheese on the burger. However, they will be charged for 3 or more slices. When this bit is turned on the customer will always be charged for the full count, irrespective of the default count. This is on by default in a Enhanced Prefix Mode Menu Item

To configure Condiment Prefixes

There are six different types of Condiment Prefixes that can be selected. Each Prefix gets a class with its own name (the "ADD" Condiment Prefix Menu Item will be associated with the Class "ADD", the "NO" prefix will be associated with the "NO" Class and so on).

Insert Condiment Prefix Menu Items

1. Navigate to the *EMC-> Enterprise level-> Configuration tab-> Menu Items->* ***Menu Item Maintenance***
2. Create a "Prefix" header Menu Item record (see image below) to distinguish the Condiment Prefixes from other Menu Items for ease of reference.

	650	**PREFIXES**	Enterprise	Defined Here
	651	ADD	Enterprise	Defined Here
	652	NO	Enterprise	Defined Here
	653	PLAIN	Enterprise	Defined Here
	654	SUB	Enterprise	Defined Here
	655	RESET	Enterprise	Defined Here
	656	EXTRA	Enterprise	Defined Here

3. Insert new Menu Item records (Condiment Prefixes) to the dedicated "Prefix" Menu Item section.
4. Add Definition and configure to be available on all levels.
5. Insert $0 Price record

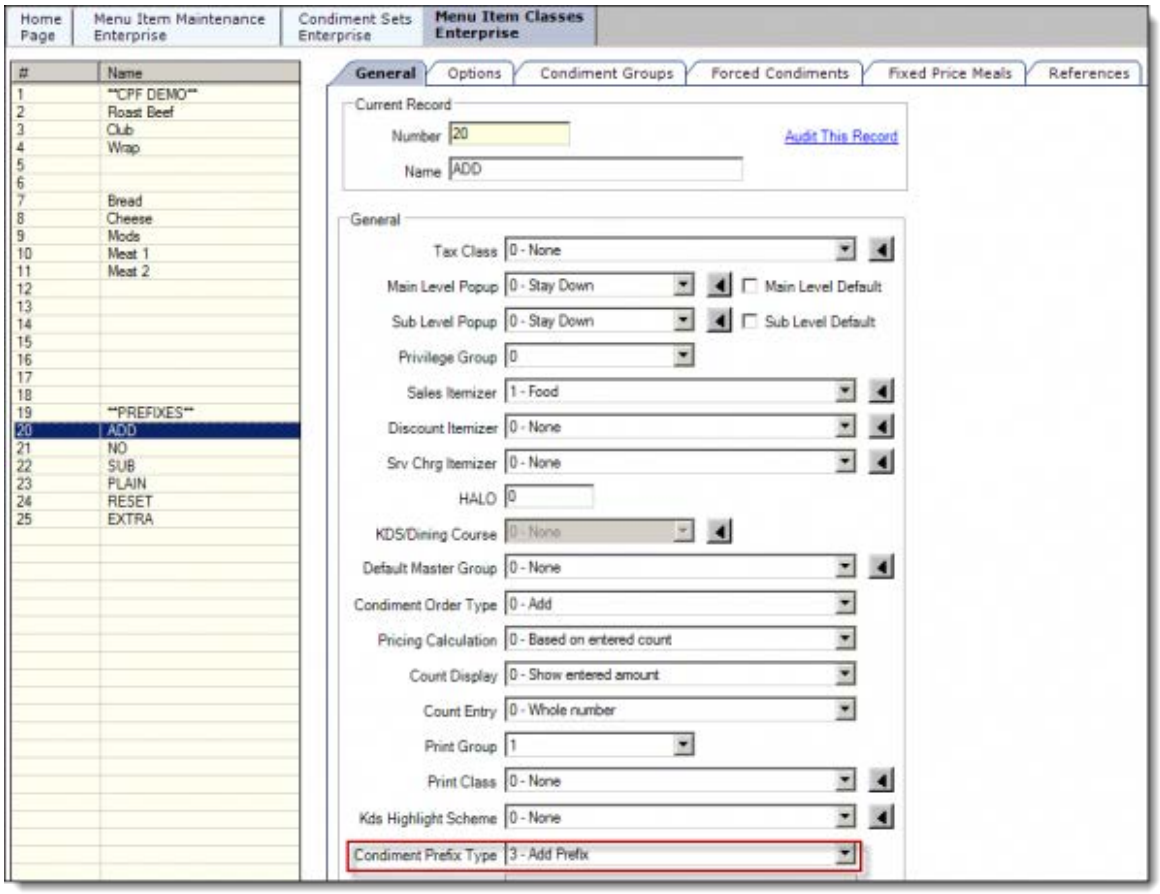
Insert Condiment Prefix Menu Item Class

1. Navigate to *EMC-> Enterprise level-> Descriptors tab-> Groups->* ***Condiment Group Names***

    a. Insert Condiment Group "CPF" into a row
    b. Close the tab

2. Navigate to the *EMC-> Enterprise level-> Configuration tab-> Menu Items->* ***Menu Item Classes*** and insert a new record.

3. Name the Class “ADD”
4. Open the record and on the General Tab, select option **[3- Add Prefix]** from the Condiment Prefix Type drop-down menu.



The Context Sensitive Help (CSH) text for the Condiment Prefix Type reads as follows:

Use the drop-down box to select the appropriate prefix type to determine prefix behavior associated with this condiment type.

Description Prefix. *Helps describe the condiment it modifies more clearly, (e.g., LITE mayo).*

No Prefix. *Indicates that the prefix will be used to indicate the removal of the default condiment (e.g., No Cheddar).*

Add Prefix. *The prefix will be used to indicate the addition of a non-default condiment (e.g., Add American).*

Sub Prefix. *Identifies this item as replacing default condiment in the same condiment group (i.e., No American, Sub Cheddar).*

Plain Prefix. *The prefix will work like a function key. When selected, all condiments are removed from the menu item detail. If an item is added back after the item is set to Plain, then we will display the items in the check detail, including default items that are placed back on the menu item. Toggling the Plain key is the same as selecting the Reset key.*

Reset Prefix. *This will reset the menu item to its original ordered state with no non-default condiments ordered and all of the default condiments automatically ordered. These options are only enabled with Menu Item Class Option 65 – Support Enhanced Prefix Mode (Parent Only).*

5. Navigate to the Options tab and enable option **[2- ON - Condiment Menu Items OFF – Regular Menu Items]** and option **[8- ON - Allow Menu Items in this Class to be Non-Priced]**

The CSH text for option **[2 - ON = Condiment Menu Items; OFF = Regular Menu Items]** reads as follows:

In Table View, the "Type" column displays "Condiment" or "Regular", based on the setting of this option. For a Menu Item to be a condiment, it must belong to a class where at least one "Member of Condiment" group is enabled.

The CSH text for option **[8 - Allow Menu Items in this Class to be Non-Priced]** reads as follows:

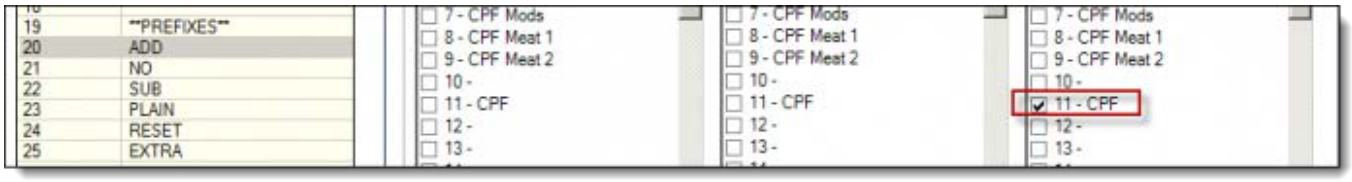
Select this option to allow menu items in this class to be non-priced. Non-priced menu items (as opposed to menu items with a preset price of 0.00) do not require an entry on the Menu Item Price form. If this option is enabled, priced menu items in this class will post a sales and count total when ordered, while non-priced items will not post a sales count.'

6. Repeat for all Condiment Prefixes (NO, SUB, EXTRA, PLAIN, RESET)

    a. Remember: EXTRA is set as a Descriptor Prefix type

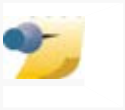
7. Assign all Condiment Prefix Classes as Members of the Condiment Group "CPF"

    a. Go to each CPF Class (as shown below) and assign it to the member group "CPF" This will ensure that all Condiment Prefixes are able to be selected as Condiments of the Regular items.



Turn on Condiment Prefix functionality

1. Navigate to the *EMC-> <Enterprise/Property/Revenue Center>-> Configuration tab-> Menu Items->* ***Menu Item Classes'***
2. For all Regular Menu Item Classes, enable option **[65 - Support Enhanced Prefix Mode (Parent Only)]** to enable CPF functionality.



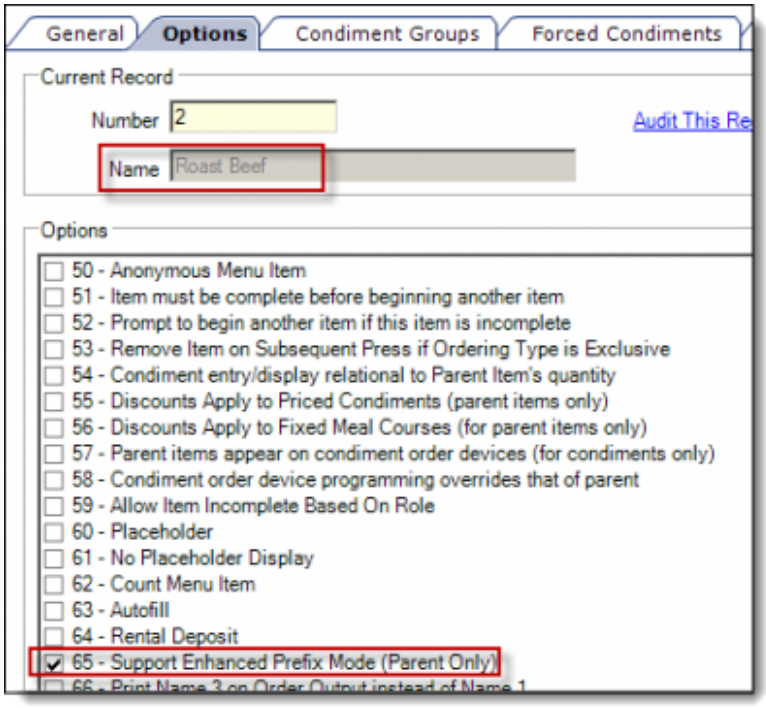
If option [65 - Support Enhanced Prefix Mode (Parent Only)] **is enabled but CPF is not being used, this is considered incorrect configuration and will negatively impact the system.**

The Context Sensitive Help (CSH) text for the Support Enhanced Prefix Mode reads as follows:

65 - Support Enhanced Prefix Mode (Parent Only)

Enable this option for non-condiment menu items only. This option enables Enhanced Prefix Support for items in this menu item class. Enhanced Prefix Support is very similar to RES style Conversational Ordering where condiment prefix items are used to more fully describe condiments "Extra" Lettuce, "No"

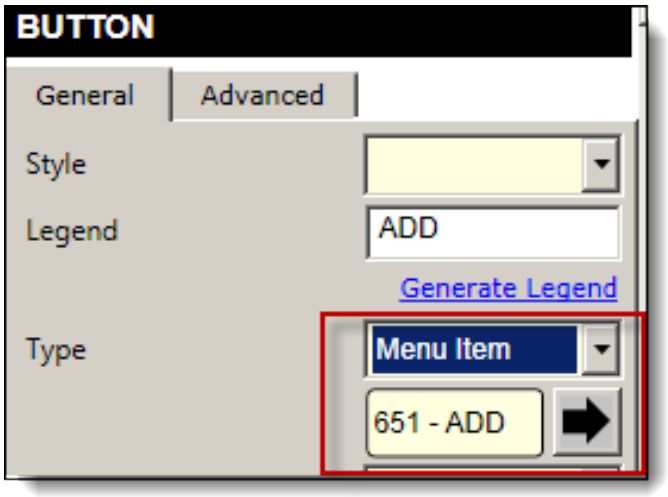
Cheese [Simphony v2.6]



Add CPF Buttons to Page Design

1. Navigate to *EMC-> <Enterprise / Property / Revenue Center> ->Configuration tab-> User Interface->* ***Page Design***
2. Open the Transaction screen
3. Add each Condiment Prefix Menu Item to the Page Design grid

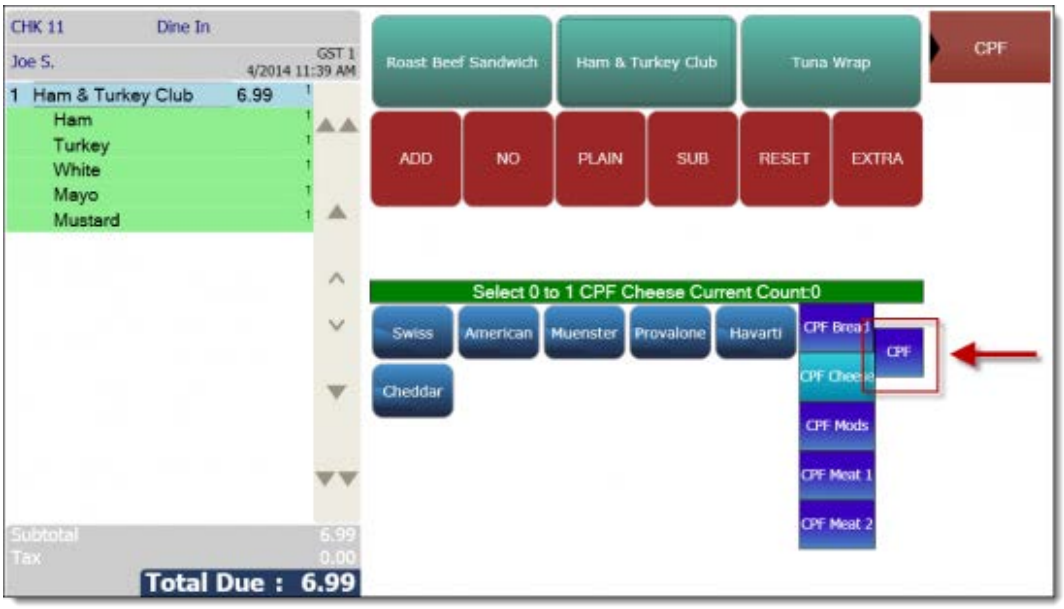
    a. Insert new Button
    b. **Type:** Menu Item
    c. Select the desired Condiment Prefix Menu Item
    d. Style as desired
    e. Generate Legend



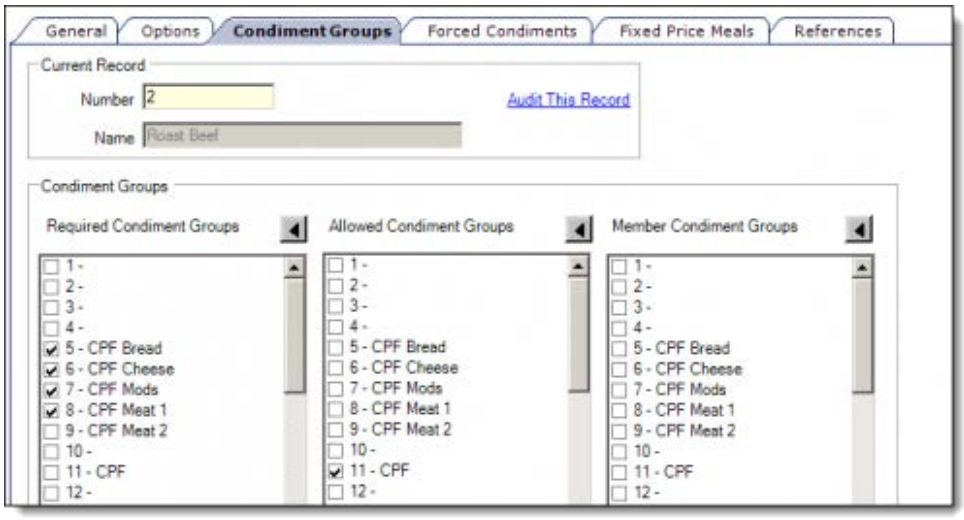
f. When completed, all CPF Menu Items will appear in Page Design (as below)

Turning Off Condiment Prefixes in the Condiment Orderer

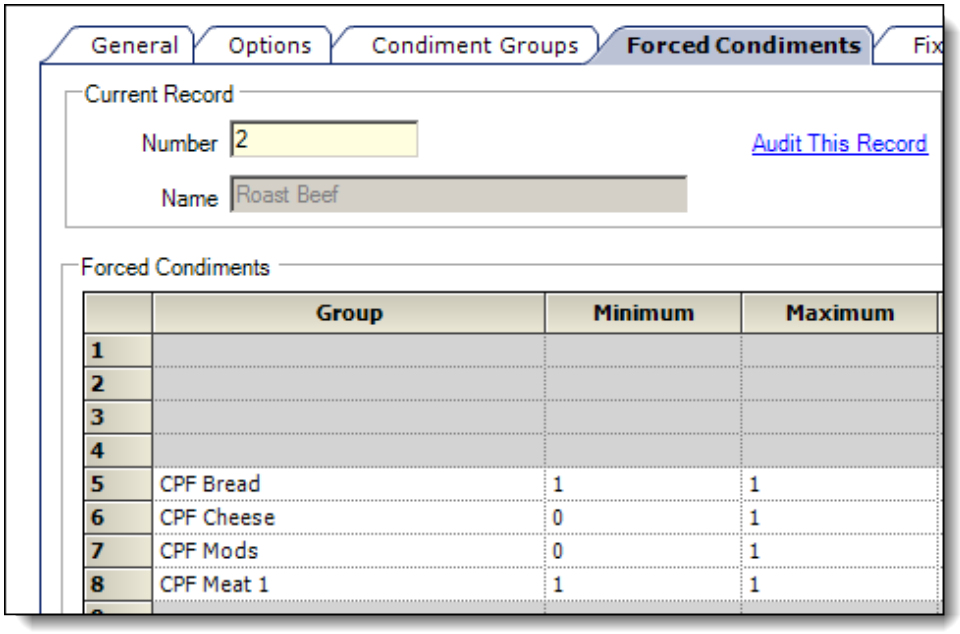
Because Condiment Prefixes are Allowed with Regular Items, they will by default appear in the Condiment Orderer as well as where they have been manually hard-coded as described above. In order to assure a clean user experience, alternative programming must be employed to work around the issue.



1. Navigate to *EMC-> <Enterprise / Property / Revenue Center> ->Configuration tab->Menu Items->* ***Menu Item Classes***
2. Select a Regular Class
3. Navigate to the Condiment Groups tab.
4. Change all Allowed Condiments to Required Condiments except for CPF (screenshot below). Make note of which Condiments were 'Allowed' for use in the next step.

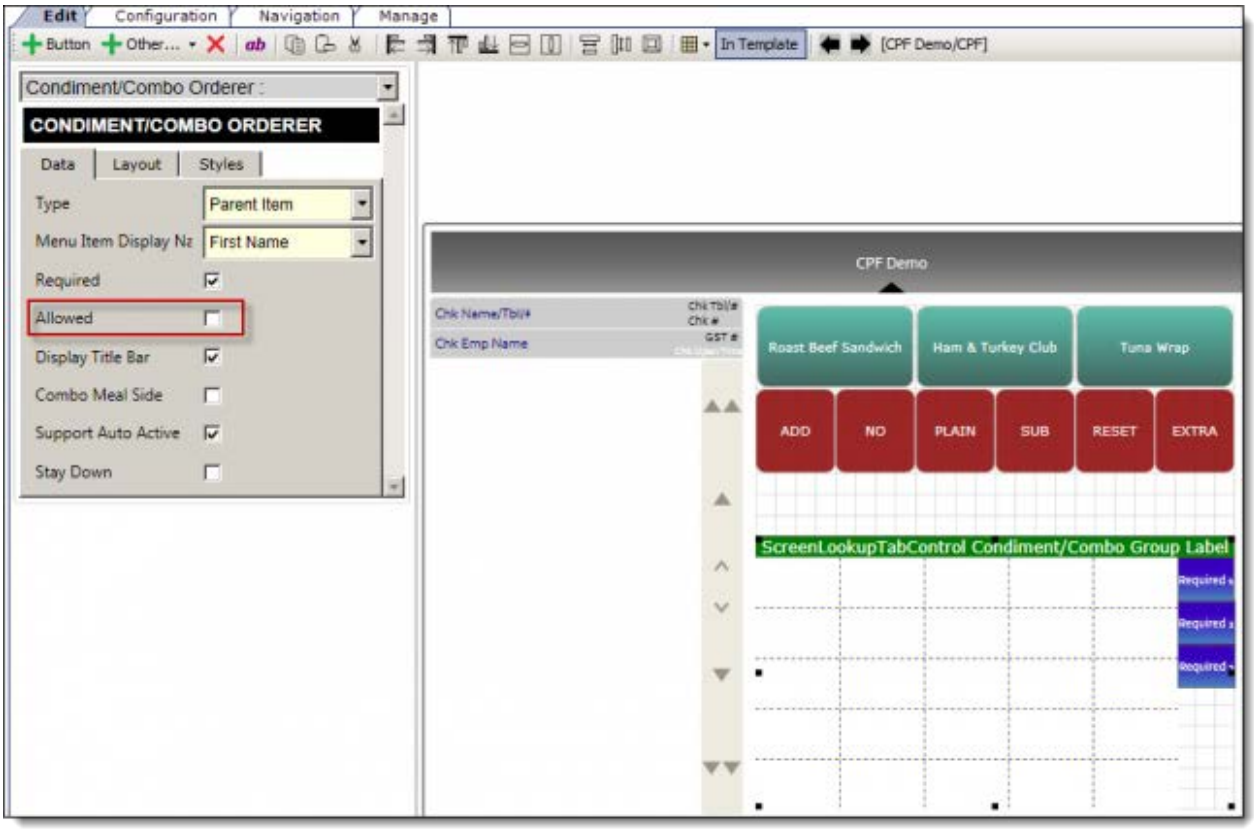


5. Navigate to the **Forced Condiments** tab.
6. Change all previously Allowed (not originally Required) Condiments to a Minimum of 0.



7. Navigate to *EMC-> <Enterprise / Property / Revenue Center> -> Configuration tab-> User Interface-> **Page Design***.
8. Select the Transaction screen and locate the Condiment Orderer being used with CPF.

9. Disable option **Allowed** in the



Condiment/Combo Orderer configuration menu.

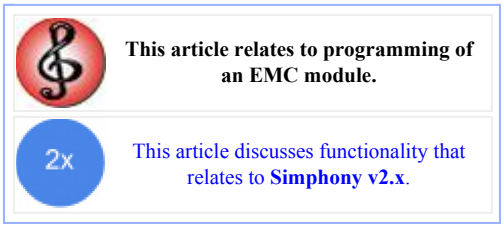
10. Save and Reload the Workstation Client.The check detail should appear as it does in the image below:

See also

- Simphony 2.6

Configuring record distribution in Simphony 2.x

This page lists the user privileges required to perform record distribution in Simphony 2.x.



Configuring privileges

1. In the EMC, select Configuration, select Roles, and then select **Actions**.
2. Select the following options for the roles assigned to the employee.

Option	Allows employee to
Distribute	Use the EMC Distribute function.
Remote Distribute Out	Move data from one revenue center (RVC) to another RVC or from one property to another property between two different databases. Users must have login credentials with permissions on the receiving database to Remote Distribute In.
Remote Distribute In	Move data from one RVC to another RVC or from one property to another property between two different databases. Select this option to allow employees associated with this role to use the remote distribute from another database into this database. Users need Remote Distribute Out permissions on the other database to distribute into this database.

Configuring additional combo meal options

You can configure additional combo meal options in various EMC modules.

Tender Media

Option	Description
85 - Not Allowed With Incomplete Meals	Select this option to disallow this tender when a meal is missing a side item.

Employee - Roles

Option	Description
161 - Allow Incomplete Item	When you select this option and the operator rings up a parent menu item that has the Menu Item (MI) Class option **[59 - Allow Incomplete Item Based On Role]** selected, the required condiment restrictions do not apply for that item.
164 - Authorize/Perform Service Total/Payment with missing meal sides	Selecting this option prevents the operator from ending a transaction when meal side items are missing.

RVC Parameters

Option	Description
51 - Allow Auto Combo Meal Recognition with the "Combo" key	Select this option to allow the combo key to function with Auto Combo Meal recognition. The system attempts to generate a combo meal using the selected item and the menu items that follow it on the check. If a complete combo meal cannot generate, the system creates the combo meal using the selected menu item and new menu items.
52 - Allow Creation of Combo Meals from Previous Round Menu Items	Select this option to enable Auto Combo Meal recognition to create combo meals from menu items that were ordered in previous rounds.

55 - Show Combo Meal Choices	Select this option to show a list of combo meal choices when the operator attempts to create meals from menu items already on the check. If the combo meals have different priorities, the list only includes meals found at the same priority level. Deselecting this option results in the highest priority meal being created.
58 - Auto Combo Meals On The Fly	Select this option if you want the system to create combo meals from the menu items added to the check in the current round. The system looks for combo meals after the operator rings each menu item. If the menu item just added is missing required condiments, the search waits until the operators adds the condiments. Selecting this option may slow the order time for each menu item, especially on large checks or slow devices. You can disable this feature at the workstation level by selecting Workstation option **[46 – Disable Auto Combo Items on the Fly]**.

Menu Item Classes

Option	Description
47 - Suppress Price with Combo Meal	This option is for condiment menu items only. Select this option if the condiments are free when ordered as part of a combo meal.
59 - Allow Item Incomplete Based On Role	When the role privilege **[Allow Incomplete Item]** is set for the operator ordering a parent item with this menu item class, and the item does not have its required condiments satisfied, selecting this option allows the operator to order the menu item without satisfying the required condiment's conditions.
60 - Placeholder	Select this option for menu items that are placeholders in a combo meal. Placeholders get replaced by an actual menu item in a later round. For example, a customer is not expected to order their dessert until after they have eaten their main meal. See Placeholder menu items in this article.
61 - No Placeholder Display	Select this option to hide placeholder items in the check detail area. See Placeholder menu items in this article.

Placeholder menu items

When ordering a combo meal or fixed price meal (FPM), the customer might not be ready to order dessert when placing their initial order. The placeholder functionality allows the server to order the meal without yet knowing each of the menu items. Placeholder items can

Figure 1

stand in for missing items until the server changes the placeholder item for the real one in a subsequent service round, as illustrated in Figure 1).

You must configure a placeholder menu item as a conventional menu item (MI) including inserting a MI master, MI definition and a $0.00 price record. Additionally, assign a MI class to its MI definition file using the placeholder option(s). Then add the placeholder menu item to each desired combo meal group (for example, combo sides) so that the system shows the placeholder item on the Child Orderer section of the page. When the server selects the placeholder item, it occupies a place in the order to allow service total.

The operator can replace the placeholder menu item at any time prior to tendering or closing the check. After replacing it with a valid item (see Figure 2), the server cannot change the item back to a placeholder item. However, the server can substitute with another valid item.

Figure 2

See also

- Combo and Fixed Price Meals
- Configuring combo meal groups
- Configuring combo meals
- Configuring combo meal pages
- Combo meal function keys

Configuring combo meal groups

Contents

- 1 Combo meal groups pricing example with side items
- 2 Combo meal groups pricing example with sizes
- 3 See also

This article relates to programming of an EMC module.

This article discusses the usage of one or more **Function Keys**.

This article discusses **configuration**, or various programming scenarios, or both.

This feature or functionality was introduced in Simphony version 2.3.

You can configure combo meals using two EMC modules: Combo Meal Groups and Combo Meals. You can configure these modules from any level (enterprise, property, zone, or revenue center). Configure the Combo Meal Groups module first and then configure the Combo Meals module. The following configuration examples illustrate a simple combo meal that includes a sandwich, side and drink. You can see more complex examples such as combo meal sizing on this page.

A combo meal group allows you to configure the menu items within a group so that Ops knows which items to combine. Two typical combo meal groups are combo sides and combo drinks.

1. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Configuration, and then select **Combo Meal Groups**.
2. On the General tab, enter the name of the combo meal group.
3. Select the combo group configuration options.

Option	Description
1 - Allow Discounts	When you select this option, discounts apply to items in the group if the the discount allows the option **[Discount Combo Meal Group Items]**.
2 - Substitution Group items use this sides price	When an operator substitutes a combo meal side with a menu item from an alternate group, selecting this option sets the menu item price to the side's combo meal price specified on the combo meal form. Deselecting this option sets the menu item price in the alternate group.

4. Add Alternate Groups (optional). When alternate groups are present, customers may substitute combo side items with other combo meal groups. For example, the customer may want to have a side item that is generally available in Combo Meal #2 with a Combo Meal #4. Configuring the swappable side groups allows the system to substitute these side menu items. You must configure an **Alternate Side** button (using the Page Design module) to substitute items in Ops. In Figure 1, *Combo Wraps* is the Alternate Group. This allows menu item substitution in that group with the Combo Sandwiches group items.

Beginning with Simphony version 2.7 MR3, you configure fixed price meals (FPM) in the Alternate Groups field. Customers often want to substitute an appetizer or salad for the entrée portion of an FPM and this field accommodates these substitutions.

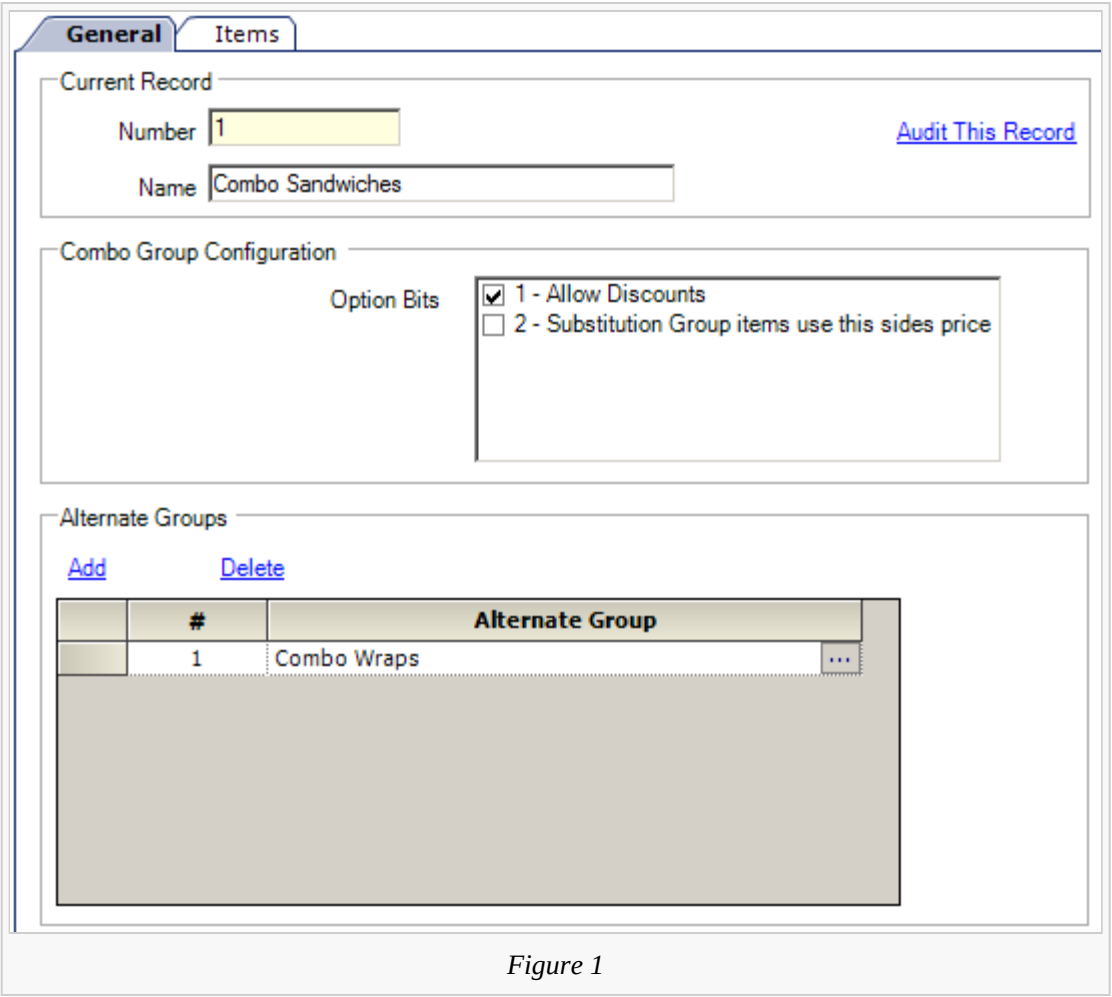


Figure 1

5. Click the **Items** tab to configure all menu items within a combo meal group.

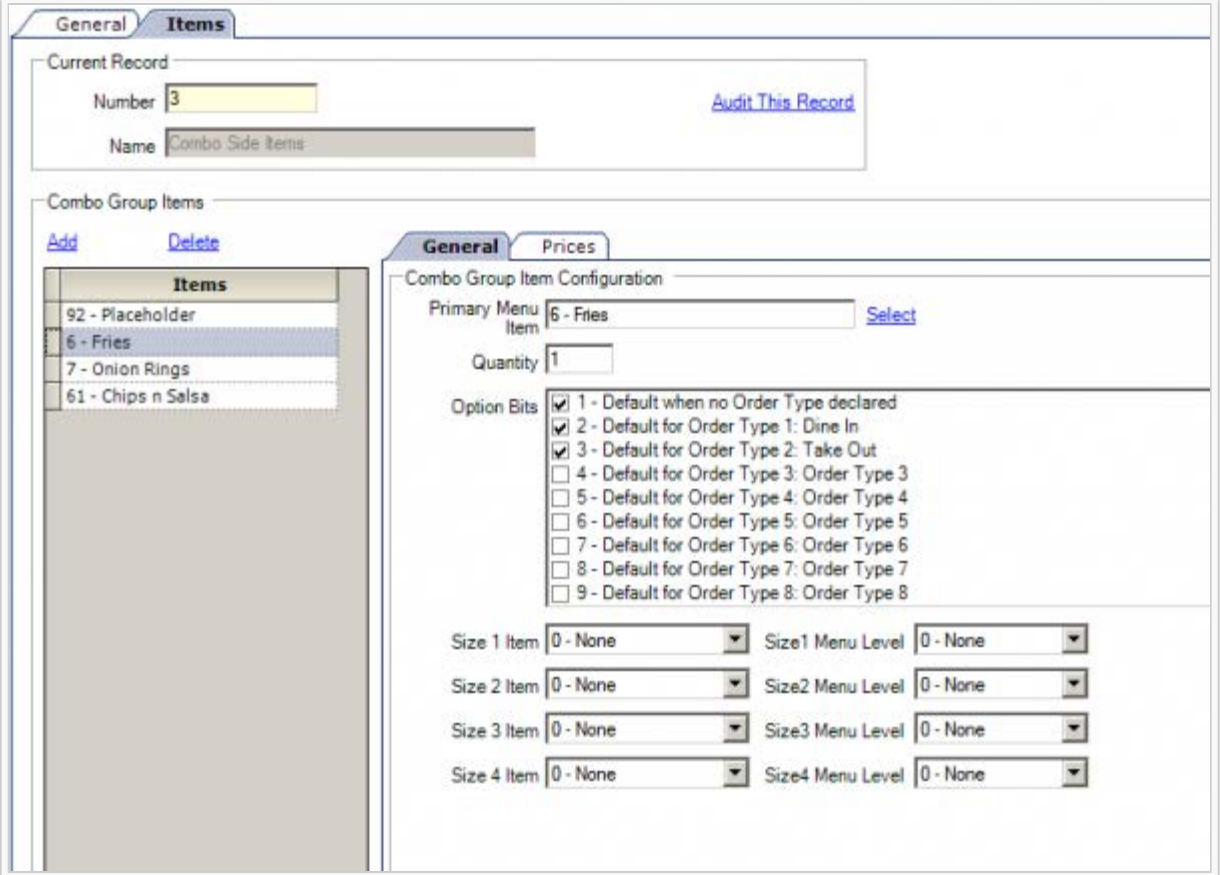


Figure 2

6. Click the **Add** and **Delete** links to add or remove menu items from the combo meal group.
7. Enter or select information in the following fields for each item:

Field or Option	Description
Primary Menu Item	Select a menu item to use in the combo meal group. For instance, if the combo group is called *Combo Side Items* (see Figure 2), items in this group could be *Small Fries*, *Medium Fries*, *Large Fries* (if using the Size 1-4 Items), and *Onion Rings* (among others). This field shows all menu item master records that contain a definition in the revenue center. See also Configuring additional combo meal options.
Quantity	Enter the number of times the menu item is needed in the combo group. This field is available for instances when a value meal consists of two burgers and a soda (as an example).
1 - Default when no Order Type declared	Select this option to make the selected item the default item for the combo group without an Order Type.
2-9 Default for Order	These options make the selected item the default item when Order Type 1 (through 8) is active. Deselecting these options forces the operator to select an item to fulfill the combo meal requirements.

Types 1-8	
10 - Autofill	If the operator orders one of the combo meals and more than one remaining item is required for the side, the quantity of the item ordered changes to the number of remaining items to complete the side requirements.
Size 1-4 Items	Select a menu item that will substitute for the Primary Menu Item when using the Combo Size **[Size 1]** through **[Size 4]** function keys (set in Page Design under Type). This list shows all menu items assigned to the combo group after saving the items to the database. In the database, the Size 1-4 fields of Combo Meal Group items are part of a self-referencing table. Because of this, EMC has two limitations: you cannot copy or paste combo meal groups, and the Size 1-4 Item fields populate only after you save items to the database. (For example, if you create a new combo group and add the items *Soda* and *Large Soda*, you must save these items before selecting either item in this field.)
Size 1-4 Menu Levels	Select a menu level that may affect the price of the substituted Size 1-4 Items.

8. Click the **Prices** sub-tab to configure each item's price. You can configure up to 8 prices for a single item.
9. Click the **Add** and **Delete** links to add or remove prices from an item.
10. Configure the following fields when adding a price:

Field	Description
Price	Enter the price to charge for the item.
Prep Cost	Enter the a la carte price of the combo group item.
Active On Level	Select the menu level on which the price is active. (See also Menu Item Price: Which price is active? and Menu Item Price: Sub Level Pricing vs. Main Level Pricing.)
Effectivity Group	Select the effectivity group for this price (optional).
Effectivity Status	
Date Start, Date End	Enter a start and end date (optional).

In Figure 3, the Onion Rings item costs $1.25. This is a common example of a side item that is an upcharged item. Perhaps the Fries item costs $0.00, but there is an extra charge if the customer orders Onion Rings.

Figure 3

Combo meal groups pricing example with side items

You can price side items on the combo meal's side items level instead of the traditional pricing at the combo meal groups items level. In some instances, this simplifies combo meal price configuration. If you configure pricing in both places, the pricing on the combo meal groups item level takes precedence.

Combo Meal #1 Drinks cost $0.99
Combo Meal #2 Drinks cost $1.09
Milk (drink choice) costs $1.50 (upcharge)

1 Combo Meal #1

Root Beer $0.99

1 Combo Meal #1

Milk $1.50

1 Combo Meal #2

Root Beer $1.09

Combo meal groups pricing example with sizes

Figure 4 illustrates the configuration for a basic combo meal group using different

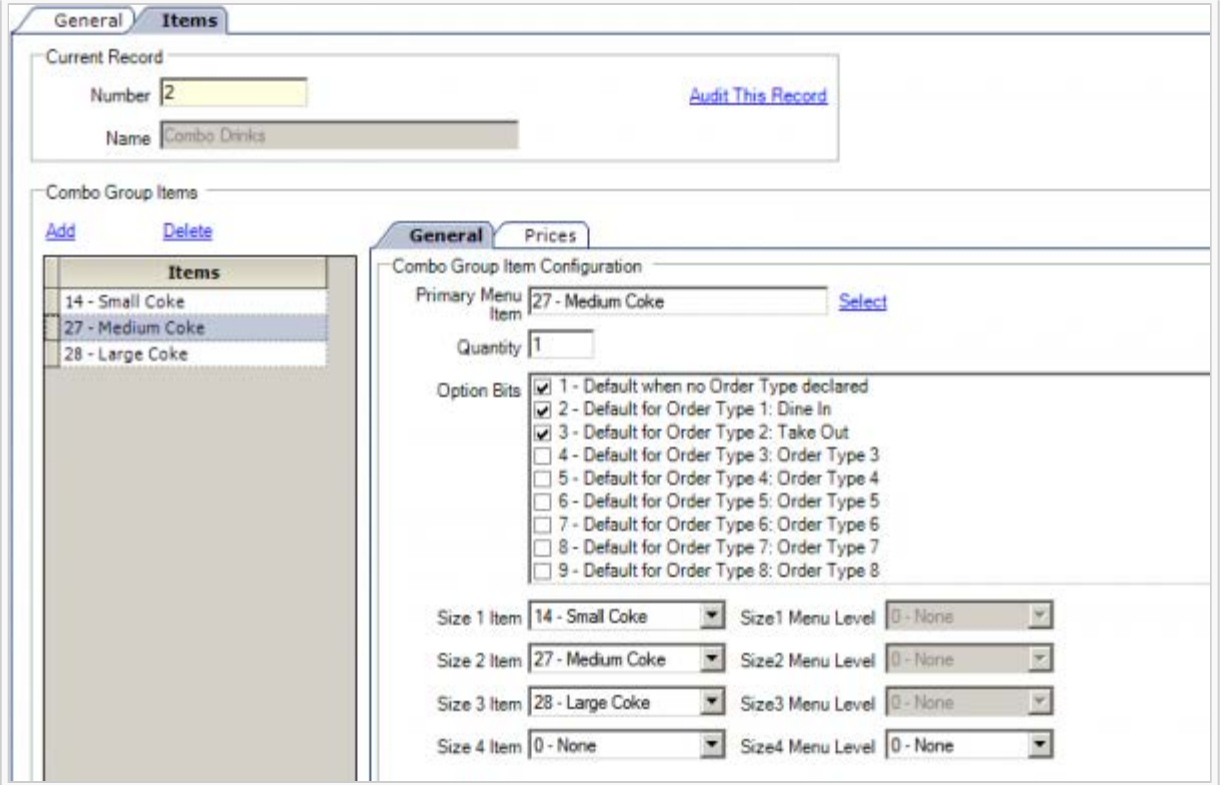


Figure 4

sizes and associated prices. The combo meal group called *Combo Drinks* contains the menu items *Small Coke*, *Medium Coke* and *Large Coke*. The *Medium Coke* is the default drink for all applicable Order Types. The operator does not need to make a selection when ringing up the combo meal item on the workstation. The system automatically rings the *Medium Coke* as the default selection (an operator can modify this choice using the sizing or substitute option). Figure 4 uses the prices of $1.00 for the *Medium Coke* and $2.00 for the *Large Coke*. To use the combo size meal functionality, set the *Small Coke* as the Size 1 Item, the *Medium Coke* as the Size 2 Item and the *Large Coke* as the Size 3 Item. You must set these Size 1-4 Item settings for all sizable combo group items listed. To ring up or change combo meal item sizes, add buttons to the combo transaction page using the Page Design module.

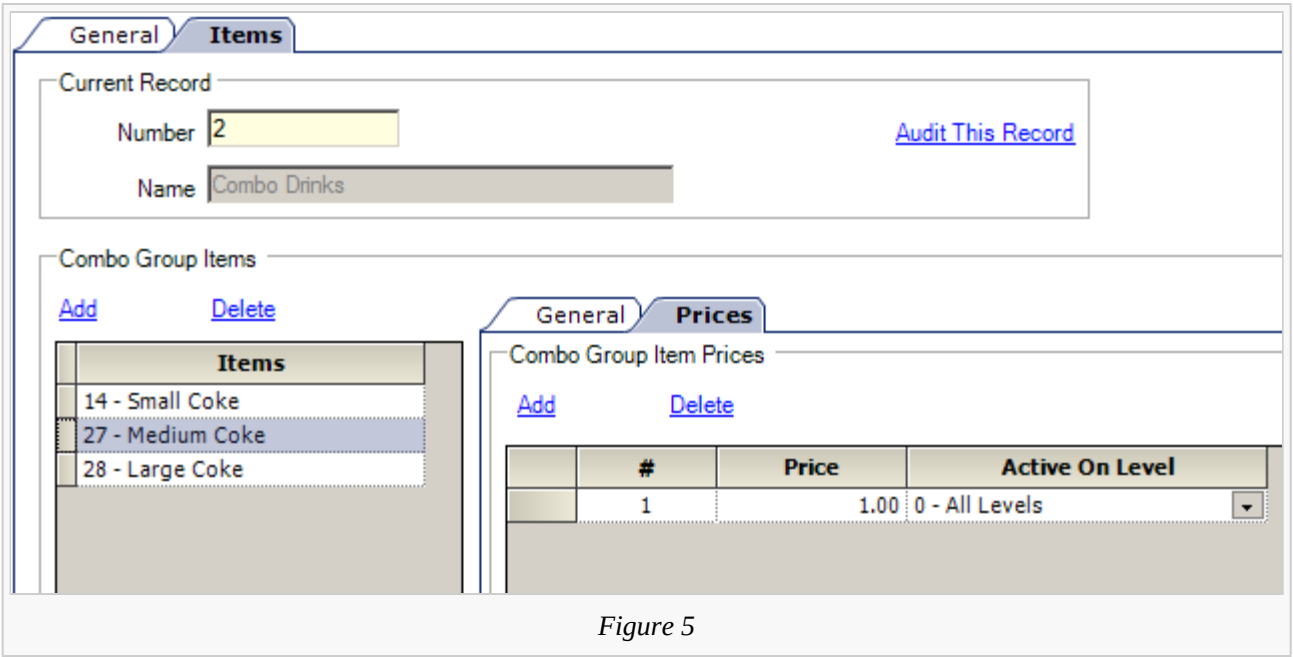


Figure 5

Figure 5 shows an optional pricing convention. You can price any combo meal menu item (for example, a *Hamburger Combo* to include all combo side and drink items. Set the combo's price in the Menu Item Definition > Menu Item Price file and do not enable option **[4 - Add Side Prices To Meal Price]** in the Combo Meal module options.

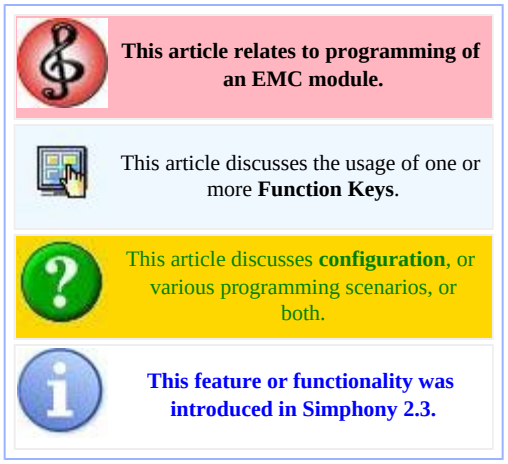
Another method is to lower the combo meal menu item price and then roll the price of the combo sides and combo drink

items into the price of the primary combo meal menu item. You can use many pricing scenarios.

See also

- Combo and Fixed Price Meals
- Configuring combo meals
- Configuring additional combo meal options
- Configuring combo meal pages
- Configuring combo meal function keys

Configuring combo meal pages



1. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Configuration, and then select **Page Design**.
2. Add combo meal keys and functions to the Transaction page. In order to ring up combo meals, create hardcoded combo meal menu item keys on the Transaction page and add a Child Orderer (formerly the Condiment Orderer) by clicking the +**Other** tab on the Page Design toolbar. You must add the Child Orderer to the same Transaction page as the combo menu items and function keys to view the combo meals and substitute side items easier.

Figure 1

3. Select the Child Orderer, select the Data tab, and then select the **Display Title Bar** checkbox. This area prompts operators when required combo meal sides or condiments are not ordered.
4. Select the **Combo Meal Side** checkbox to have the system generate and show any

combo meal side items.

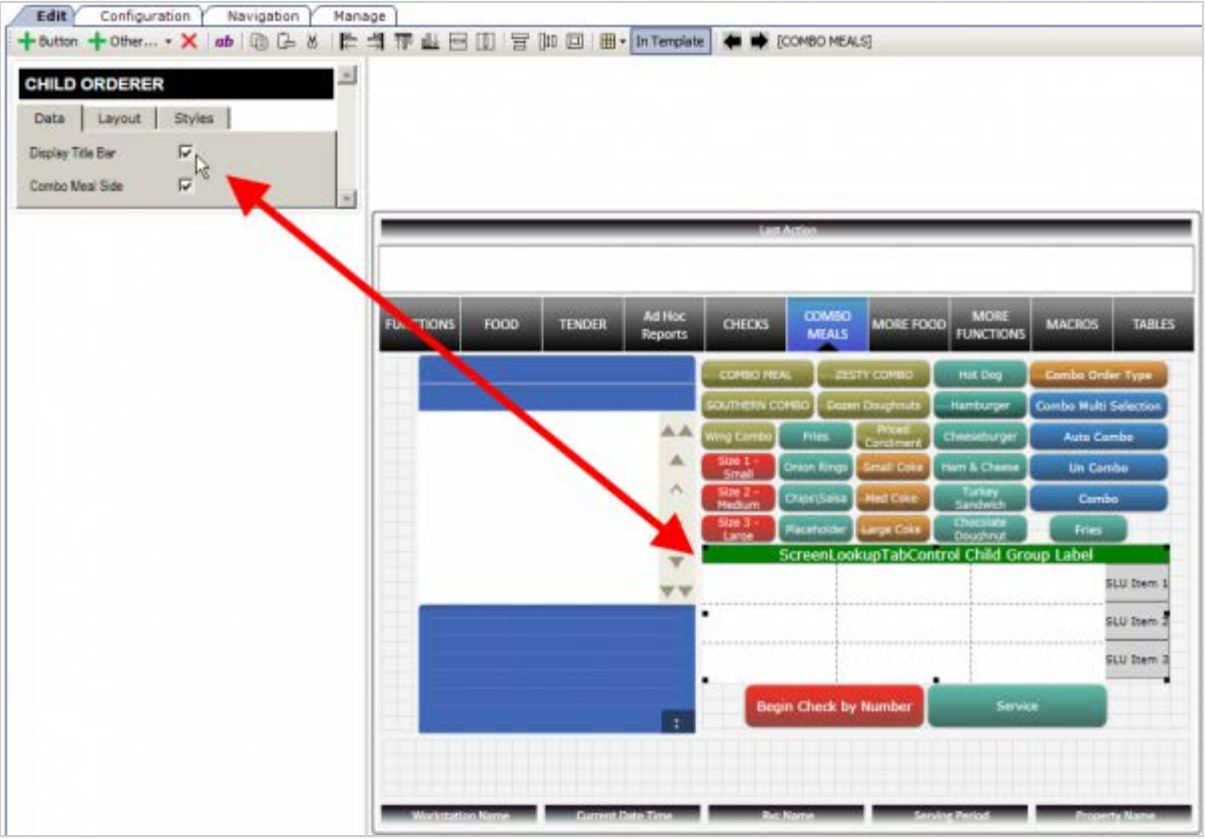


Figure 2

5. Create combo meal size keys (if needed). These keys allow toggling between sizes of combo meal items. You can name the combo size keys for an actual size such as small, medium or large, or Combo Size 1, Combo Size 2, and so on.

Figure 3

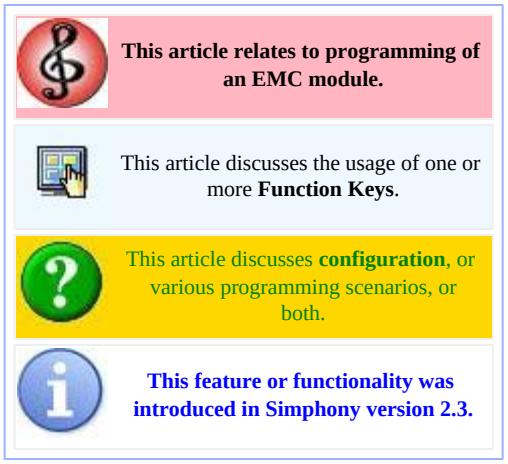
6. Add the appropriate function keys to the Combo Meal Transaction page (for example **Combo**, **Un-Combo**, **Auto Combo** and **Combo Multi-Selection**).
7. Configure keys for all individual menu items available (in particular combo groups).

See also

- Combo and Fixed Price Meals

- Configuring combo meal groups
- Configuring combo meals
- Configuring additional combo meal options
- Configuring combo meal function keys

Configuring combo meals



You can configure combo meals from any level (enterprise, property, zone, or revenue center) using two EMC modules: Combo Meal Groups and Combo Meals. Configure the Combo Meal Groups module first and then configure the Combo Meals module (using instructions on this page).

1. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Configuration, and then select **Combo Meals**.
2. For each combo meal, enter the following information:

Option	Description
Menu Item Master	Select the menu item that represents the combo meal. The menu item is the base combo meal item, usually named Combo 1 or Chicken Sandwich Combo (or something similar). The list shows all menu item master records that have a definition in the revenue center (RVC).
Priority	This field determines which items belong to certain combo meals when using the **[Auto Combo]** function key. When a single menu item belongs to two different combo meals, it associates with a combo meal in priority 1 before it associates with a combo meal in priority 2. If this field is set to 0, the combo meal is considered after all other priority entries.
Auto Combo Algorithm	Use these settings when creating a combo meal from menu items already rung up on a check. With the **[Auto Combo]** function key, the system uses one of the following options to combine the combo meal items: ▪ 0 - First Deal Found: Select this option to have the system use and combine the first item(s) found. ▪ 1 - Best Deal for Customer: Select this option to combine the most expensive items as a combo meal. ▪ 2 - Best Deal for Merchant: Select this option to combine the least expensive items as a combo meal. If a check contains milk at $1.25 and soda at $0.99, the algorithm determines the item used when creating the combo meal. The Auto Combo Algorithms do not consider condiment prices or combo meal side item prices. For example, the system may choose to add milk as the beverage because the milk costs more than the soda. However, the combo meal price for the milk could be higher than the combo meal price for the soda. In this case, the best deal may not really be the best deal.

3. Select the appropriate options.

Option	Description
1 - Disable Auto-	Select this option to prevent the combo meal from being considered when the operator uses the **[Auto**

Combo Recognition	**Combo]** key.
2 - Allow Auto-Combo in Previous Round	Select this option to allow the combo meal to consider previous-round items when the operator uses the **[Auto Combo]** function key.
3 - Is Sized Combo Meal	Select this option to allow the combo meal to use Combo Size **[Size 1-4]** function keys, changing the size of the items ordered.
4 - Add Side Prices To Meal Price	Select this option to add the prices of the meal's side items to the price of the meal on the KDS display and the printed guest check.
5 - Only Print Priced Sides On Guest Check	Select this option to prevent the meal's side items from printing on the guest check when they have no price, or when their price rolls into the price of the meal.
6 - No Charge For Condiments	Select this option when added condiments (to the meal) are non-priced.
7 - No Bulk Order With Quantity Order	This option controls the ordering process when a user orders more than one combo meal. Selecting this option prompts the operator for each non-default side item per meal. Deselecting this option allows the operator to specify a count when ordering non-default side items, and the system does not continue to the next side item until all of the combo meals satisfy the side items requirement.
8 - Allow Resizing of Individual Sides	Select this option to allow the operator to change the size of a single specific combo meal side item. Deselect this option to allow the operator to resize the entire combo meal.
9 - Do Not Show With Combo Meal Choices	If operators can create multiple combo meals from the existing menu items rung up on a check and you select this option, a system-generated list of available choices does not include the combo meal. This combo meal only appears in the list when no combo meals are found.
10 - Keep Last Item Selected after Ordering a New Meal	Select this option if you expect modifications to this combo meal after ordering the last side, keeping the the combo meal selected. This is particularly useful if the last side is often modified.
11 - Is	Select this option to allow the system to incorporate the meal items in the combo as individual menu items in the Auto Combo On The Fly process. For example, you can configure a Donut 6 combo meal and enable option **[11]**. When a customer orders a

Defined Combo Meal	Donut 6 combo and then adds one more donut, the option allows the system to handle the Donut 6 combo as six individual donuts. The auto combo procedure creates an auto combo meal from the menu items added to the check in the current round and initiates a Donut 7 combo instead of adding a seventh donut at full price. This results in a lower price for the guest.

4. Do not price items within the combo meal's **Combo Group Price** field for combo size meals as this could cause issues with the **Size 1-4 Items** fields in the Combo Meal Groups module.

See also

- Combo and Fixed Price Meals
- Configuring combo meal groups
- Configuring additional combo meal options
- Configuring combo meal pages
- Combo meal function keys

How to configure credit card preambles in Simphony 2.x

This article describes how to configure credit card preambles in a Simphony 2.x environment.

This article discusses **configuration**, or various programming scenarios, or both.

This article relates to programming of an EMC module.

1. Navigate to the *EMC* > *<Enterprise/Property>* > *Sales* > ***Tender/Media***
2. Double-click a credit card tender and enter Form View.
3. Click **Options**.
4. Click **Credit Card Options**.
5. Under the Preambles heading, click **Add**.
6. In the **Start** column, type the number or the number range that the credit card preamble should start with.

   For example, if the preamble record defines a range such as 3050 to 3090, this field represents the begin range which is 3050*.
   7. In the **End** column, type the number or the number range that the credit card preamble should end with.
   For example, if the preamble record defines a range such as 3050 to 3090, this field represents the end range which is 3090*.
   8. In the **Length** column, type the total number of digits that are in the credit card number.
   9. If you want to define another preamble:

      a. Repeat steps 5-9.

   12. Click **Save**.
   13. If you want to delete a preamble:

      a. Select the row that you want to delete.
      b. Click **Delete**.
      c. Click **Save**.

See also

- Credit Card Preamble

Configuring Employee Maintenance reporting permissions

This feature or functionality was introduced in Simphony 2.7 MR2.

Follow the steps outlined below:

1. In the EMC, select Enterprise / Property / Revenue Center, select Configuration, and then select **Employee Maintenance**.
2. Select the employee record associated with reporting role permissions to view and edit the Employee Maintenance Reporting tab.
3. Select the **Reporting** tab.
4. View and change settings for the employee's mymicros.net account.
5. Save your changes and close the Employee Maintenance module.

See also

- Roles
- Configuring reporting roles

Configuring reporting roles

This feature or functionality was introduced in Simphony 2.7 MR2.

Configuring reporting roles

1. In the EMC, select Enterprise, select Configuration, select Roles, select EMC Modules, select the Personnel area, and then select **Roles – Reporting row**.
2. Assign user permissions to view or edit the Employee Maintenance Reporting tab by selecting the appropriate Roles – Reporting View and Edit options. These options are both deselected by default when adding new roles to Simphony.
    - **View** only selected – The employee can see the Reporting tab contents, but the fields are dimmed.
    - **View** and **Edit** selected – The employee can see the Reporting tab contents and make changes to the fields.
3. Save your changes and close the Roles module.

See also

- Roles
- Configuring Employee Maintenance reporting permissions

Control Parameters

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony 2.0.

This article discusses a topic related to **security**.

The Control Parameters EMC module allows you to configure confirmation- and security-related workstation behavior (for example, thresholds, validation, user prompts). This functionality was introduced in Simphony 2.0. (In previous Simphony versions, the fields from this module were configured in RVC Parameters.) You can configure the Control Parameters module at the enterprise, zone, property, and revenue center levels.

Configuring Control Parameters

1. In the EMC, select Enterprise / Property / Zone / Revenue Center, select Setup, and then select **Control Parameters**.
2. Click the **Configuration** tab.
3. Enter information in the following fields. The maximum value of these fields is 999 days. However, checks are purged from the database (depending on the setting) for the Number of Days to Save Closed Checks.

Field	Description
Automatic Operator "Popup" Interval (min:sec)	Select the amount of time (in minutes and seconds) that a workstation waits before signing out an inactive popup operator (or staydown operators with the operator option enabled, **[If Staydown Operator, Enable the Auto Popup Timeout]**). For MMHs, this interval cannot exceed 60 minutes. You can disable the interval for specific workstations by selecting the workstation option **[21 - Disable Employee Auto Sign Out]**.
Number of Checks Printed Before Authorization	Enter the number of times an On Demand operator can reprint a guest check before manager authorization is required.
Confirm Number of Guests Threshold	This value determines the threshold for the workstation, prompting the operator for confirmation when the number of guests exceeds the threshold set here. For instance, if this field is set to 10 and an operator enters 12 guests for a check, the workstation prompts, "More than 10 guests?". (This field is used to prevent operator errors.) If this field is set to 0, operators are not prompted for the guest count threshold.

Number of Days to Adjust Closed Checks	When a privileged employee uses the **[Adjust Closed Check for Previous Business Days]** function key (442), the employee can adjust closed checks for the amount of days specified in this field. To allow checks from the current business day (only) to be adjusted, set the value to 0.
Number of Days to Reopen Closed Checks	When a privileged employee uses the **[Reopen Closed Check for Previous Business Days]** function key (443), the employee can re-open closed checks for the amount of days specified in this field. To allow checks from the current business day (only) to be re-opened, set the value to 0.

4. Click the **Options** tab.
5. Enter information in the following fields.

Option	Description
1 - Prompt On-Demand Operators to Print Split Checks	Select this option to prompt an On-Demand operator when splitting guest checks. The prompt **`Print Check?`** appears and the operator must confirm the operation. Unselect this option to suppress the prompt.
2 - Do Not Prompt for Guest Count When Prorating PMS Itemizers	This option applies only if you select the RVC Parameters option **[Prorate Itemizers When Posting a Partial Tender To a PMS]**. Select this option to prevent the system from prompting for the number of guests when posting a partial tender to a PMS. Unselect this option to prompt the operator for the number of guests when posting a partial tender to the PMS.
3 - [Begin Check] Key Confirmation Not Required	Select this option to allow operators to begin a check with one press of a **[Begin Check]** key. Unselect this option to force operators to press the key a second time to begin a check.
4 - [Pickup Check] Key Confirmation Not Required	Select this option to allow operators to pickup a check with one press of a **[Pickup Check]** key. When this option is unselected, operators must press the key a second time to pick up a check. If a check is associated with a table number and it is picked up by check number, *and* there is more than one group at the table, a user is prompted; this option does not apply.
5 - No Confirmation Required when Changing Keyboards with [Keyboard Select] Keys	Select this option to allow operators to change keyboards with one press of the **[Keyboard Select]** function keys. Unselect this option to force operators to press the key twice to change keyboards. For more information, see Keyboard Workstation.
7 - Confirmation Required for Seat Number Changes	Select this option to allow operators to perform changes to a guest check's seat numbers with one press of the **[Edit Seat]** function key (701) Unselect this option to force operators to press the key twice to change seat numbers.
8 - Display	

Summary Totals Only After Order Type Declared	For more information about this functionality, see Order Type: Order Types as Subtotal Keys.
9 - Prompt for Guest Count when Split Check	Select this option to prompt for the guest check count on the new check when performing a split check operation. The prompt occurs only if there is a guest count on the original check. No prompting occurs if you select the RVC Parameters option, **[Use Number of Seats for Guest Count]**, or if any menu item on the check is linked to a menu item class with the option **[11 - Add to Guest Count]** selected. When the prompt appears, the new count must be less than or equal to the original check's guest count.
10 - Prompt for Void Reason Code	Select this option to prompt for a void reason code during void and return operations. If you select option **[24 - Treat Error Corrects as Voids]**, error corrects also prompt for a void reason code when you select option **[10]**.
11 - Prompt for Guest Information when Beginning Party Check	Select this option to automatically prompt the operator to enter guest information when beginning a party check. Deselecting this option allows the operator to enter the guest information only by using the **[Enter Guest Info]** function key (566) after starting or picking up the check.
12 - No Confirmation Required when Creating Combo Meals from Existing Items	Select this option to automatically create combo meals when the operator uses the [Auto Combo] function key. Deselect this option to have the workstation show a dialog box with the combo meals to be created.
13 - Convert Weight to System Unit of Measure	When you select this option, if the scale's Unit of Measure (UOM) does not correspond to the UOM established by Simphony in Property Parameters options, the system converts the weight to the property’s UOM. For example, if the scale sends 8 ounces and the system is configured to use pounds, Ops records the item as .5 pound. When you deselect this option, if a UOM mismatch is detected, Ops does not allow posting of the weighed item and returns a message indicating that the UOM’s are not in agreement. You must deselect this option to comply with United States weights and measures requirements.
17 - Cashier Totals Declaration Required with Tender/Media and Tips Paid	Select this option to require operators (or the workstation being used) to have a cashier link in order to post tenders, tips paid, and other media transactions.
18 - Require Cashier Totals to Begin Transaction	Select this option to require operators (or the workstation being used) to have a cashier link in order to begin a guest check or a fast transaction.
19 - Require Finalization of Check after Partial Tender	Select this option to require operators to close a transaction in full after posting any partial payment. When you select option [19], the operator cannot service total a partially paid check or cancel a transaction. The operator can make charge tip service charge entries after a partial tender (not menu items or discounts). The operator can perform credit authorizations after a partial tender.
20 - Allow	

Void of Discount in Current Service Round Only	Select this option to allow privileged operators to void discounts only in the current service round. Deselect this option to allow privileged operators to void discounts that were posted in the current round or in any prior service round. You must deselect this option to allow operators to void discounts on reopened checks.
21 - Allow Void of Service Charge in Current Service Round Only	Select this option to allow privileged operators to void service charges only in the current service round. Deselect this option to allow privileged operators to void service charges that were posted in the current round or in any prior service round. You must deselect this option to allow operators to void service charges on re-opened checks.
22 - Allow Void of Tender/Media in Current Service Round Only	Select this option to allow privileged operators to void Tender/Media entries only in the current service round. Deselect this option to allow privileged operators to void Tender/Media entries that were posted in the current round or in any prior service round. You must deselect this option to allow operators to void Tender/Media entries on re-opened checks.
23 - Open Drawer Only if Balance Due is 0.00	Select this option to prevent a [Tender/Media] key from opening the cash drawer unless the balance due is $0.00. Deselect this option to allow a [Tender/Media] key to open the cash drawer even if there is a balance due on the transaction. If the transaction's subtotal is 0.00 and you select option **[36 - Do Not Open Cash Drawer if Subtotal is 0.00]**, the drawer does not open (the setting of this option is not relevant in that situation).
24 - Treat Error Corrects as Voids	Select this option to cause voids from the current service round to post to the Void totals on financial reports. Selecting this option and selecting option [10 - Prompt for Void Reason Code] causes the workstation to prompt for void reasons when the operator performs an error correct. When you deselect this option, these items post to the Error Correct totals on financial reports.
25 - Allow Only One Group per Table	Select this option to prevent the operator from assigning more than one group to a table. For example, the operator can only open one check per table. If Table #11 is open, the operator cannot assign another Table #11. Deselect this option to allow the operator to begin a table number even when a table is open with the same number. (When using Touch Split, multiple groups are created for the same table. This option does not affect Touch Split.)
26 - Validation Required for Menu Item, Service Charge Voids	Select this option to print a validation chit at the designated validation printer in the event of a menu item void or a service charge void.
27 - Validation Required for Menu Item Returns	Select this option to print a validation chit at the designated validation printer in the event of a menu item return.
28 - Only Non-Sales Transactions Output to Journal	Select this option to send only non-sales transactions to the journal. Non-sales transactions are individual transactions that include tips paid, pickup and loan, no sale, transaction cancel, and so on.
29 - Only Sales Exception Items Output	Select this option to send only sales exception items to the journal. Exception items are posted within a transaction and include voids, returns, or error corrections that require authorization from a privileged employee (that is, if error corrections are not programmed to require authorizations, they

to Journal	are not exception items).
30 - Allow Changes to Menu Items on Closed Checks	Select this option to allow privileged operators to make changes (additions, voids, and so on) to the menu item postings on closed checks after they have been reopened.
31 - Allow Service Total of Closed Checks	Select this option to allow privileged operators to service total reopened closed checks.
32 - Allow Overtender of Closed Checks	Select this option to allow privileged operators to over tender closed checks, thereby causing either a change due or charge tip situation.
33 - Employee ID Required with [No Sale] Key	For more information about this option, see No Sale.
34 - Print Voucher When Employee Discount or Employee Tender is Used	Select this option to print a voucher when an employee discount or an employee tender is used. The voucher prints at the validation printer designated for the workstation. Deselect this option to suppress printing of an employee discount or employee meal voucher.
35 - Require Reference Entry With Price Override	Select this option to require the operator to enter a reference entry when using the **Menu Item Price Override** function key (641).
36 - Do Not Open Drawer if Subtotal is 0.00	Select this option to prevent the cash drawer from opening for transactions in which the subtotal is $0.00. An Adjust Closed Check operation changes the type of tender used, but the transaction balance remains $0.00. This is an example of a transaction in which one might want the cash drawer to remain closed. Nothing is removed from or placed in the drawer. Deselect this option to allow the cash drawer to open whenever the operator presses a Tender/Media key that is programmed to open the drawer.
37 - Enable Condiment Masking	Select this option to show only condiments that can be ordered with the parent menu item. Deselect this option to show all condiments.
38 - Staydown Operators Pop Up if 2 Drawers Assigned	Select this option to make staydown operators become popup operators when both are using the same workstation (a workstation with two cash drawers) and both cash drawers are assigned. This option applies mainly to bartenders, who are usually staydown operators, but who should be treated as popup operators (signed out at the end of a transaction) when two bartenders are using one workstation with two drawers assigned (one drawer for each bartender).
39 - Allow Pickup/Creation of Unassigned Checks	Select this option for the revenue center to allow creation and pickup of unassigned checks. The system begins an unassigned check (usually by a professional services application or other MICROS peripheral product such as Guest Connection or Suites Management) without an owner. When using an Open Check SLU, privileged operators see their own checks as well as any unassigned checks in the revenue center, but they do not see other operators' open checks.
40 - Allow	

"Print Customer Receipt" after non-printing Tender/Media	Select this option to allow operators to use the **[Print Customer Receipt]** function key (524) after a transaction where the Tender/Media record is not configured to print a customer receipt. This option is designed for revenue centers with the On Demand Customer Receipts option deselected.
42 - Always Open Cash Drawer if Change Due	When you select this option, the cash drawer opens even when there are no tenders on the check that should usually open the drawer, provided that there is change due for the transaction, and provided that the current tender is not configured to open the drawer. This option is typically used for Tender/Media records such as gift certificates, where change is issued only if the gift certificate exceeds the value of the transaction (thus, the drawer open to issue change), but the drawer should remain closed when the gift certificate does not exceed the transaction's total. (In this example, the gift certificate tender would be configured to NOT open the cash drawer.) When you deselect this option, the cash drawer opens only for tender records that are configured to open the drawer.
43 - Allow Price Overrides and Modifications to Previous-Round Items	Select this option to allow menu item price overrides, quantity changes, and menu level changes for current-round and previous-round items. Deselect this option to apply those operations to current-round items only.
44 - Permit Required Condiments To Be Entered Out Of Order	In conversational ordering, an item may require the operator to specify certain condiments (for example, meat temperature). However, it may be undesirable to require the customer to order condiments in the order expected by the workstation. Selecting this option allows the operator to enter required condiments out of order (out of their numerical required condiment number sequence).
45 - Store Reference Entries In Plain Text	The SECURE_DETAIL table typically stores reference entries encrypted. Selecting this option insert the information into the plain text column of the SECURE_DETAIL table. Use caution when selecting this option because secure data is stored in plain text.
46 - Confirmation Required for Rvc Change with Sign In Rvc Index	If the operator signs into a non-default different revenue center with a [Sign In Rvc Index] key, this option determines whether the system prompts the operator for confirmation.
48 - Allow Original v2.x Page Designer	
49 - Enable Shift Tracking	Select this option to activate shift reporting, segregating employee, employee tip, and cashier financial totals by shift. Deselect this option to have employee, employee tip and cashier totals accumulate in a single total set. See RVC Parameters Calendar for shift reporting reset options.
50 - Increment Cashier Shift when Clocking Out*	Select this option to increment the shift for the cashier associated with the employee clocking out. This does not apply when the employee clocks out on break. Deselect this option to have the shift for the cashier associated with the employee remain the same.
51 - Increment Cashier Shift when Clocking In*	Select this option to increment the shift for the cashier associated with the employee clocking in. This does not apply when the employee is returning from break. Deselect this option to have the shift for the cashier associated with the employee remain the same.

52 - Increment Cashier Shift when Changing Job*	Select this option to increment the shift for the cashier associated with the employee when they clock in with a different job. This clock in occurs automatically when the employee signs in to a workstation with a different revenue center than the job in which they are currently clocked in. Deselect this option to have the shift for the cashier associated with the employee remain the same during this clock in cycle.
53 - Increment Cashier Shift when Changing Revenue Center*	Select this option to increment the shift for the cashier associated with the employee when they sign in to a different revenue center. Deselect this option to have the shift for the cashier associated with the employee remain the same when signing in to a different revenue center.
54 - Prompt before incrementing Cashier Shift*	Select this option to prompt the employee to increment the shift for the cashier associated with the employee when the shift is set to increment upon clocking in or out, changing jobs, or changing revenue centers. Deselect this option so that no prompting occurs when the cashier shift is set to increment through one of those methods.
55 - Prompt to Increment Cashier Shift after Shift Report*	Select this option to prompt the operator to increment the cashier shift when a Cashier Shift Report is generated with a shift scope. Deselect this option so that no prompting occurs and the cashier shift does not increment.
56 - Increment Employee Shift when Clocking Out*	Select this option to increment the shift for the employee upon clocking out. This does not apply when the employee clocks out on break. Deselect this option to have the shift for the employee remain the same.
57 - Increment Employee Shift when Clocking In*	Select this option to increment the shift for the employee upon clocking in. This does not apply when the employee is returning from break. Deselect this option to have the shift for the employee remain the same.
58 - Increment Employee Shift when Changing Job*	Select this option to increment the shift for the employee when they clock in with a different job. This clock in occurs automatically when the employee signs in to a workstation with a different revenue center than the job in which they are currently clocked in. Deselect this option to have the shift for the employee remain the same during this clock in cycle.
59 - Increment Employee Shift when Changing Revenue Center*	Select this option to increment the employee shift when they sign in to a different revenue center. Deselect this option to have the employee shift remain the same when signing in to a different revenue center.
60 - Prompt to Increment Employee Shift after Shift Report*	Select this option to prompt the operator to increment the employee shift when an Employee Shift Report is generated with a shift scope. Deselect this option to have no prompting and leave the employee shift the same.
61 - Prompt before incrementing Employee	Select this option to prompt the employee to increment the employee shift when the shift is set to increment upon clocking in or out, changing jobs, or changing revenue centers. Deselect this option to have no prompting when the employee shift is set to increment through one of those methods.

Shift*	
62 - Prompt for Number of Guests when posting the final Tender	Select this option to have the system prompt for the number of guests when posting the final tender, which overrides any previously entered count. If you select RVC Parameters **[Auto Service Charge Defaults to Off]** and set **[# Of Guests Before Auto Service Charge]** to a value greater than 0, this does not impact the automatic service charge for a transaction. Unselecting this option causes the system to use the prevailing number of guests (if there is one).
63 - Prompt for Number of Guests on original check when split	Select this option to prompt the operator for the number of guests on the original check when splitting a check.
64 - Update When Signed Out	Select this option to allow pending database updates to occur only when no operators are signed in to the workstation. Deselect this option to allow pending database updates to occur as defined in the **Database Update Frequency** field, even if an operator is signed in.
65 - Allow open of Cash Drawer on Service Charge	Select this option to allow the cash drawer to open for transactions where the service charge has a value greater than $0.00 but the subtotal is $0.00.

* This option has no effect when you deselect option **[49 - Enable Shift Tracking]**.

See also

- Security category
- Parameters (disambig)

Credit Card Batching, Editing, and Transferring

Credit Card Batching, Editing, and Transferring are activities performed by users on finalized credit cards. This article discusses the EMC modules used to perform credit card operations and describe the terminology used by these modules.

This article relates to programming of an EMC module.

Contents

- 1 Create Batch
  - 1.1 What is a Batch?
  - 1.2 Using the Module
- 2 Edit Batch
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- 3 Create Report
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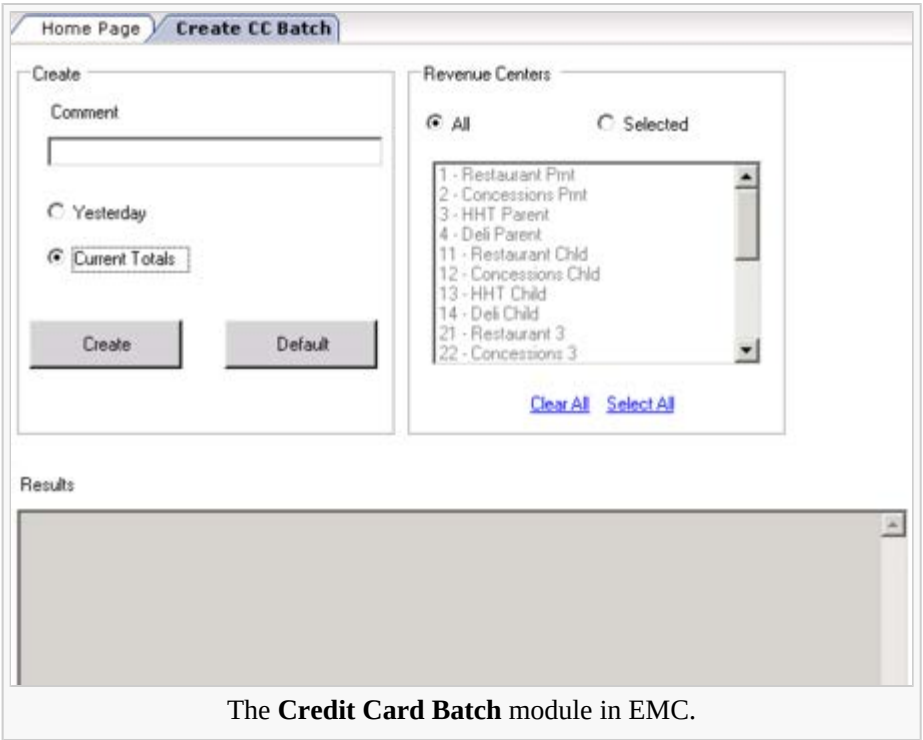
- 4 Transfer Batch
  - 4.1 Transfer and Settle
  - 4.2 Using the Module
- 5 See also

Create Batch

In the **Create Batch** module, a user can create a Credit Card Batch.



The **Credit Card Batch** module in EMC.

What is a Batch?

A "batch" is a collection of credit cards that have already been finalized on the workstation. Once a batch is created, these credit card records are ready to be edited or settled. If a user accesses a check on a workstation with a batched credit card, the credit card payment is not allowed to be modified.

Typically, Credit Card Batches are created via a PC Autosequence during the SOD process. That being the case, this module is used quite infrequently. It is used most often in these situations:

- The site wants to batch multiple times

per day, at various times of their own choosing.
- For some troubleshooting purposes, a site may choose to run a batch using this module instead of automatically.

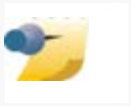
Using the Module

This module is divided into three sections:

Revenue Centers
: From this list, a user can choose the "All" option to create a batch for all RVCs, or choose "Selected" and then choose the RVC(s) to be batched. This list displays only the RVCs that the logged-in user is able to view, based on Employee Role permissions.

Create
: In this box, the user configures information about the batch that will be created. The "comment" field allows any user-defined text that describes the batch (this field may be used optionally). The "Yesterday" and "Current Totals" boxes let the user determine which type of totals to batch.

  - Yesterday - Choose this radio button if the batch to be created should be for Yesterday's totals (and all dates prior to yesterday). All checks that were closed yesterday or before and include an unsettled Credit Card will be included in the batch.
  - Current Totals - Choose this radio button if the batch to be created should be for all closed checks that include unsettled Credit Cards up to the current time. Typically, the "Yesterday" option is used, unless the site batches multiple times throughout a day.



The "default" button sets the fields to the original state: the RVCs become unselected, the comment box is blanked, and the "All" radio button is checked.

Results
: After the user clicks "create", the Results window displays information about the batch.

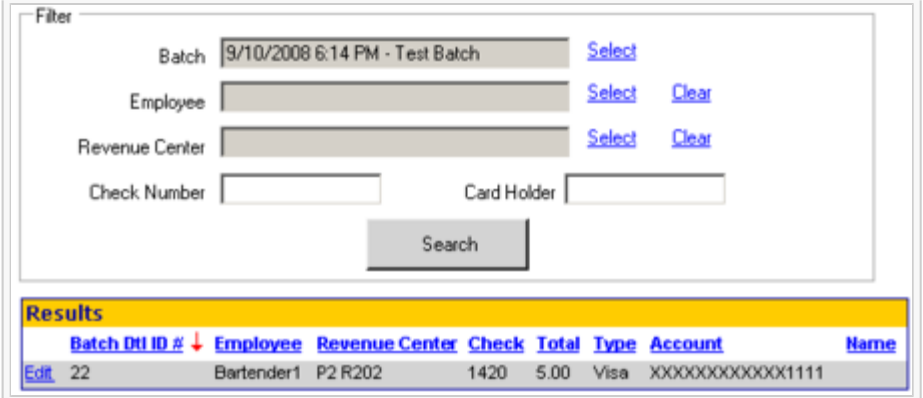
Edit Batch

In the **Edit Batch** module, a user can edit records from a Credit Card Batch that has not yet been settled. A user may need to edit records in any of these scenarios:

- During the settlement process, the system was not able to fully settle a batch. Some records may fail to settle, and they will have to be edited so that the "omit" flag is enabled.
- A user mistyped a manual authorization number, and the card will not settle. A user can edit the Authorization Code.
- A user mistyped a credit card number, and the card was not authorized because it did not reach the Floor Limit required to perform an authorization.
- A tip was entered as $2000.00 instead of

The **Edit Batch** module in EMC.

$20.00. The user can edit the tip amount.



The **Edit Batch** module after the user has selected a batch. The module displays a list of credit cards in the batch.

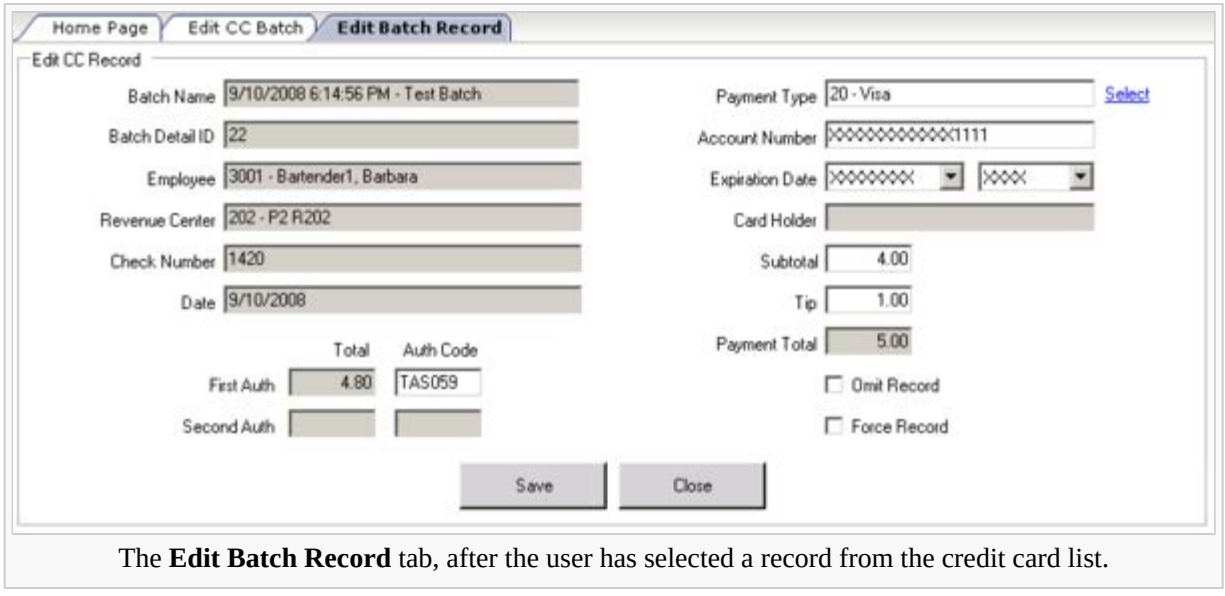
In many environments, PC Autosequences batch and settle credit cards automatically during the SOD process. When this occurs, there is no way to edit any of the cards in the batch. In more cautious environments, cards are batched automatically but settled manually (usually by a privileged member of the accounting staff), giving the user an opportunity to scan the records for abnormalities, such as the $2000.00 tip mentioned above.

Using the Module

When the module opens, by default there is nothing a user can do. Prior to pressing search, the user must select a batch. The records listed in the batch selection dialog include all batches for this property that have not yet been settled. The batches are named with the time of creation (in UTC) and the comment used when creating the batch, if any. In addition to selecting the batch, the user has the option of entering search criteria to return only specific results, using these filtering methods:

- The Employee who finalized the transaction.
- The Revenue Center where the transaction took place.
- The Check Number
- The name of the card holder. ***Note:*** *This field is often encrypted on the card and may not be stored in the MICROS database. Therefore, it is not always possible to use this as a search parameter.*

After search has been pressed, the results grid appears below the Filter box. (The example image shows a batch that contains only one credit card record.) To edit a record, click the "edit" link in the leftmost column. This opens the **Edit Batch Record** form in a new tab. From this tab, the user can edit the properties of the credit card record:



The **Edit Batch Record** tab, after the user has selected a record from the credit card list.

Authorization Codes

If the card was manually authorized, the user may have mistyped the authorization code; this field lets the user correct this information.

Payment Type
: This field lists all the Credit Card tenders in this property. A "Credit Card" tender is any tender where the tender's option bit, **[33 - Require Credit Auth Before Service Total]** is enabled. While it is rare that a user would change the Tender Type, this field allows this behavior.

Account Number and Expiration Date
: These fields let the user update the account number and month/year of the card's expiration. These fields display the masked information; when editing, the user will enter the full unmasked account number and expiration date.

Card Holder
: This field displays the name of the card holder if it is known. It cannot be edited.

Subtotal
: This editable field displays the total of the credit card amount prior to adding the tip.

Tip
: This editable field displays the tip added to the subtotal.

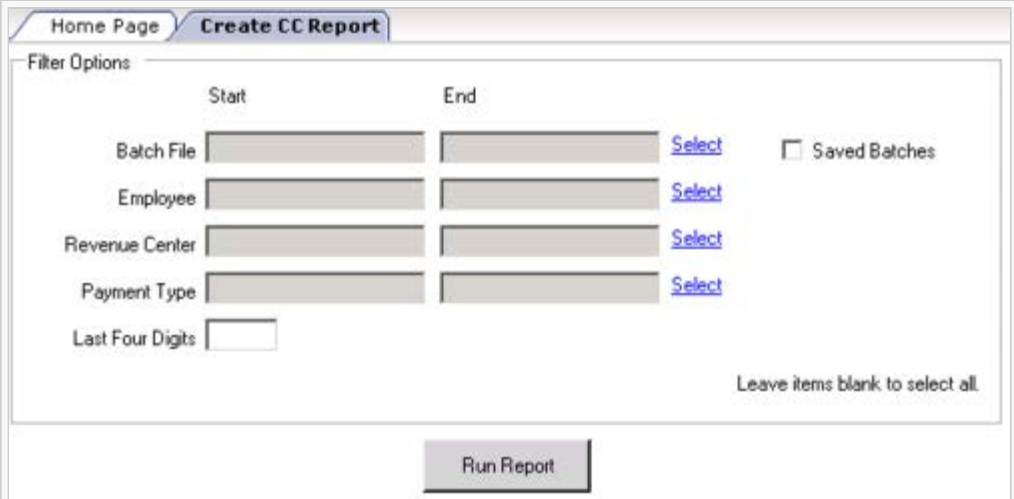
Payment Total
: This field calculates the value of the Subtotal and Tip amounts. This is the amount that will be charged to the customer.

Omit Record
: Select this option to omit this record from being settled.

Force Record
: Select this option to mark the record as "forced" for the settlement process. Normally, this option is used in instances where a record has been rejected, but the user does not wish to omit it from being settled. This option is not recognized by all Credit Card Driver Types.

Create Report

In the **Create Report** module, a user can generate a report that displays detailed information about credit card transactions. This module lets the user create reports on settled or unsettled batches, and it also allows some filtering criteria to view specific records.



The **Create Report** module in EMC.

This module is used in a number of scenarios; two common examples are:

- In many sites, PC Autosequences automatically batch credit cards, but the batch is not automatically settled. In this type of environment, someone on site (usually a member of the accounting staff) creates a report to review the batch before settlement, making edits to records if necessary.
- If a card holder has a dispute with the site, a report can be run to find the customer's card to troubleshoot the issue.

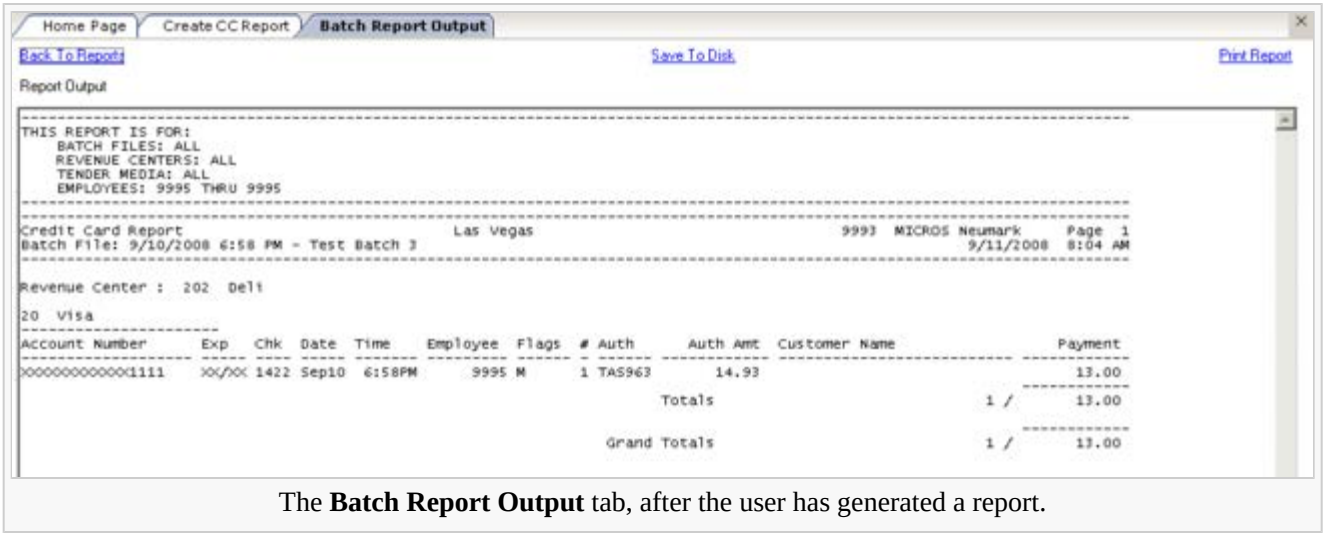
Using the Module

A report can be run at any time after the module opens. If only one unsettled batch exists for the property, it is common that a user enters the module and presses the "Run Report" button without entering any search information. This action

will return a report that includes all unsettled batches, all employees, all RVCs, all payment types, and all account numbers. To generate a specific report that does not include all information, a user can use the search criteria:

Batch File
: Select a batch or range of batches to be used in taking the report. When the "Saved Batches" checkbox is checked, the list of batches includes all settled batches. When "Saved Batches" is unchecked, the list displays only unsettled batches.

Employee
: Select an employee or range of employees to be used in taking the report. This field represents the employee who finalized the transaction.



The **Batch Report Output** tab, after the user has generated a report.

Revenue Center
: Select a Revenue Center or range of Revenue Centers to be used in taking the report.

Payment Type
: Select a Tender/Media or range of Tender records to be used in taking the report. This field lists all the Credit Card tenders in this property. A "Credit Card" tender is any tender where the option, **[33 - Require Credit Auth Before Service Total]**, is enabled.

Last Four Digits
: To find a credit card by the last four digits, enter the last four digits here. To search for any credit card numbers, leave this field blank.

After "Run Report" is pressed, the **Batch Report Output** form displays in a new tab. From this tab, the user can view the report, print it, or save it to disk.

Transfer Batch

In the **Transfer Batch** module, a user can select a batch and transfer it to the bank.

Transfer and Settle

The terms "Settle Batch" and "Transfer Batch" are used interchangeably. When a batch is settled/transferred, this

The **Transfer Batch** module in EMC.

means that the credit cards in the batch are transmitted to the Credit Card Processor; this activity is essentially a deposit into the establishment's bank for the total of all Credit Cards that are included in the batch.

Using the Module

This module is quite simple to use:

1. Select the batch or range of batches to be settled.
2. Press the Transfer button.
3. A message above the grid will display the current activity. After the process is complete, the grid will display the results of the batch(es) with appropriate status messages.

See also

Credit Cards	Credit Cards · Credit Card Authorize/Finalize · **Credit Card Batching, Editing, and Transferring** · Credit Card Driver · Credit Card Driver Type · Credit Card Function Keys · Credit Card Merchant Group · Credit Card Operations (CA Driver) · Credit Card Operations (No CA Driver) · Credit Card Preamble · Credit Card Voucher · How to Configure Credit Cards · Loadable Credit Card Payment Driver Configuration · Prepaid Credit Card · Property Merchant Groups · Quick Service Transaction · RFID Credit Card Transaction
Learning series: Credit Cards	

Credit Card Preamble

This article reviews the setup of credit card preambles. There are several topics that are available by clicking on the provided links.

This article discusses **configuration**, or various programming scenarios, or both.

This article relates to programming of an EMC module.

Contents

- 1 What is a credit card preamble?
  - 1.1 Rules for defining credit card preambles
  - 1.2 Sample List of Preambles for the U.S.
  - 1.3 How To
- 2 See also

What is a credit card preamble?

A Credit Card Preamble, sometimes called a Credit Card Prefix, is a digit or series of digits at the beginning of a credit card number that identifies the type of card that is being used.

Rules for defining credit card preambles

Adhere to the following rules for governing a valid credit card preamble:

- The **Start** and **End** preambles must end with an asterisk (*). For example, 304*
- The number of digits in the **Start** and **End** fields must be the same.
- The number of digits in the **Start** and **End** fields cannot exceed the Length defined.
- The value of the **End** field must be greater than the value of the **Start** field.

Sample List of Preambles for the U.S.

The values listed below apply to all US sites, however there are additional types that are accepted in other countries and the local processor should be contacted for the specific list. The list also changes as card providers are bought out (for example, Discover purchased Diners Club in 2008) and should be updated regularly. All credit cards are configured in the EMC in the Tender/Media module.

Start	End	Length	Card Type
40000000*	49999999*	16	Visa
51000000*	55999999*	16	MasterCard
222100*	272099*	16	MasterCard
34000000*	34999999*	15	American Express
37000000*	37999999*	15	American Express
36000000*	36999999*	14	Diners Club
38000000*	39999999*	16	Diners Club
30000000*	30599999*	16	Diners Club
30950000*	30959999*	16	Diners Club
35280000*	35899999*	16	JCB
60110000*	60110999*	16	Discover
60112000*	60114999*	16	Discover
60117400*	60117499*	16	Discover
60117700*	60117999*	16	Discover
60118600*	60119999*	16	Discover
62212600*	62292599*	16	Discover (CUP)
62400000*	62699999*	16	Discover (CUP)
62820000*	62889999*	16	Discover (CUP)
64400000*	65999999*	16	Discover

Credit Cards	Credit Cards · Credit Card Authorize/Finalize · Credit Card Batching, Editing, and Transferring · Credit Card Driver · Credit Card Driver Type · Credit Card Function Keys · Credit Card Merchant Group · Credit Card Operations (CA Driver) · Credit Card Operations (No CA Driver) · **Credit Card Preamble** · Credit Card Voucher · How to Configure Credit Cards · Loadable Credit Card Payment Driver Configuration · Prepaid Credit Card · Property Merchant Groups · Quick Service Transaction · RFID Credit Card Transaction
Learning series: Credit Cards	

Currency Availability

Currency Availability is the EMC module where a user configures the non-base Currencies (i.e., "foreign" currencies) that are available in a location (the base currency for a location is configured in Currency Parameters). This functionality was introduced in Simphony 2.0; in previous versions, the fields from this module were configured in the older-design currency module, on the alternate tab. This module is zoneable; it can be configured at the Enterprise, in a Zone, or in a Property.

This article relates to programming of an EMC module.

This article discusses **internationalization** of the system.

This feature or functionality was introduced in Simphony 2.0.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 EMC Configuration
- 2 See also

EMC Configuration

The module displays 30 records; these are the 30 non-base Currency records in the location. It is not possible to add or delete records from this module, but it is possible to add overrides. There is no Form View for this module. For each record in this module, the configurable fields are the Currency field and the Option Bits:

Currency
: Select a Currency for the record. Currency records are always configured at the Enterprise.

2 - Issue Change In Other Currency
: Select this option to issue change from a currency conversion in this currency. Do not select this option if change is to be issued in the base currency. If this option is selected, it disables the **[Prompt for Issuing Change]** option.

3 - Prompt For Issuing Change
: Select this option to cause the workstation to prompt the operator `Issue change in (currency name)?`. Do not select this option if change is to be issued in the base currency. This option is active only if the **[Issue Change in Other Currency]** option is not selected.

Rounding Options, 4, 5, and 6
: See Currency Rounding for more information.

See also

Currency	Currency · **Currency Availability** · Currency Conversions · Currency Parameters · Currency Rounding · Currency (PMC Procedure)
Learning series: Currency	

Currency Conversions

Currency Conversions is the EMC module that determines how one Currency rate converts to another. This functionality was introduced in Simphony 2.0; in previous versions, the fields from this module were configured in in the older-design currency module. Conversions in Simphony 2.0 are configured differently than in previous versions. This module is zoneable; it can be configured at the Enterprise, in a Zone, or in a Property.

Contents

- 1 EMC Configuration
  - 1.1 Zoneability
  - 1.2 Fields
  - 1.3 Conversion Fields
  - 1.4 Saves and Error Checking
- 2 See also

EMC Configuration

Zoneability

This module is a standard Table View/Form View module (but there is no Form View) that allows records to be added, deleted, or overridden. While this module is zoneable, it is typical that records are configured on the Enterprise only. Consider a system programmed with these four tenders:

- United States dollar
- Euro
- Algerian dinar
- Moroccan dirham

In general, it is only necessary to configure the conversions from one of these currencies to another at the Enterprise. Thus, every Property will receive the same conversion. It may be necessary, however, for one location to have a slightly different conversion rate for the same two currencies; for example, a Euro-to-Dollar conversion may be standard for the Enterprise, but there may be an airport that has a different rate. By making Currency Conversion Records zoneable, this configuration is possible.

Fields

Each Currency Conversion record has three configurable fields:

Currency

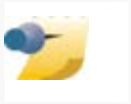
One of the two currencies in the record. This field, divided by the Rate, determines the number of "Conversion Currency" records.

Conversion Currency

The other currency of the conversion record. This field, multiplied by the Rate, determines the number of "Currency" records.

Rate

This field determines how the Currency and Conversion Currency are calculated.



The **Currency** and **Conversion Currency** fields can be entered in any order. For example "Currency" can be United States dollar while "Conversion Currency" can be Euro, or vice-versa. This type of configuration is easier for the user: when Currency A converts to Currency B at a 31.5 rate, it is easier to choose Currency A as the "Currency" field with a rate of 31.5, rather than selecting Currency B as "Currency" with a rate of 0.0317460317 (1/31.5).

Conversion Fields

Two additional columns, **Conversion** and **Conversion Reverse**, calculate automatically to provide the user with additional information about the record. Consider this configuration:

- Currency: Algerian dinar
- Conversion Currency: Moroccon dirham
- Rate: 9.107

With this configuration, the conversion columns display:

- **Conversion**: There are 9.107 Algerian dinar records in one Moroccon dirham.
- **Conversion Reverse**: There are 0.10967 Moroccon dirham records in one Algerian dinar record.

Saves and Error Checking

A record cannot be saved when any of these conditions is true:

- The "Rate" field is larger than 21,474,836.47
- The "Currency" and "Conversion Currency" fields for one Currency Conversion record are both configured for the same Currency record.
- Two records in the same location are configured with the same pair of Currency Records (the Currency and Conversion Currency fields are the same).

See also

- Wikipedia: Currency pair
- Wikipedia: Exchange rate

Currency	Currency · Currency Availability · **Currency Conversions** · Currency Parameters · Currency Rounding · Currency (PMC Procedure)
Learning series: Currency	

Currency Parameters

Currency Parameters is the EMC module where a user configures the primary Currency for a location (other currencies in the location are configured in Currency Availability). This functionality was introduced in Simphony 2.0; in previous versions, the fields from this module were configured in the older-design currency module and Property Parameters. (The Rounding options and the Alternate Currency were configurable; the Base Currency was not displayed in EMC.) This module is zoneable; it can be configured at the Enterprise, in a Zone, or in a Property.

This article relates to programming of an EMC module.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 EMC Configuration
  - 1.1 Changing the Base Currency
- 2 See also

EMC Configuration

The Base Currency, Alternate Currency, and options are configurable in this module:

Base Currency
: In this field, select the primary currency that will be used for this location. Every location must have a Base Currency; this currency is used when converting from the other currencies (configured in Currency Availability).

Alternate Currency
: This field determines the Alternate Currency being used in this location. The Alternate Currency is used only for sites where the Euro is used as the base currency, and the site is transitioning to the Euro. By configuring this field, both the Euro and national currency amounts can be configured to display on Guest Checks and Receipts. This value in this field must correspond to one of the "Available Currency" records in the location.

Option Bits
: The option bits configured here are used for rounding. See Currency Rounding for more information.

Changing the Base Currency

The Base Currency field should rarely be changed. Ideally, this field is changed only during the initial configuration of a location, prior to any checks being opened. When a user changes the Base Currency and attempts to save, EMC will provide two prompts to verify:

1. *You are changing the Base Currency of this location to another currency. If checks have been rung using the old currency, some balancing/reporting problems may occur. Are you sure you want to change the Base Currency?*
2. If the user answers "yes", EMC will prompt again: *PLEASE CONFIRM: By changing the Base Currency, you may cause balancing or reporting problems in any location that uses this record and where checks have already been ordered. Are you sure you want to do this?*

Because this module is zoneable, it is not realistically possible for EMC to find every location where this Base Currency may have been used. MICROS recommends that Role privileges are configured so that very few users are unable to edit this module.

See also

Currency	Currency · Currency Availability · Currency Conversions · **Currency Parameters** · Currency Rounding · Currency (PMC Procedure)
Learning series: Currency	

Currency Rounding

This article discusses the **Currency Rounding** options that can be configured in the Currency Availability module or the Currency Parameters module.

This article discusses behavior that is important for **Reporting**.

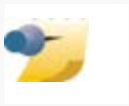
Contents

- 1 Option Bits
- 2 Rounding Examples
- 3 See also

Option Bits

4 - Round Currency
: Select this option to round the amount due according to options 5 and 6. Do not select this option to truncate the amount due to the number of decimal places configured for the selected Currency record.

5 - ON = Round to Nearest 0; OFF = Round to Nearest 5
: This option only applies if **[Round Currency]** is enabled. When this option is disabled, currency amounts round to the nearest 5 (163.336 becomes 163.335); when this option is enabled, currency amounts round to the nearest 0 (163.336 becomes 163.340).



See the examples below for a clearer explanation of the possible configurations with these options.

6 - ON = Round to Second-Least Significant Digit; OFF = Round to Least Significant Digit
: This option only applies if **[Round Currency]** is enabled, and this is affected by the setting of the **[ON = Round to Nearest 0; OFF = Round to Nearest 5]** option. Select this option to round currency amounts due based on the second least significant digit (in 1234.56, the "5"). Do not select this option to round currency amounts based on the least significant digit (in 1234.56, 6).

Rounding Examples

The examples discussed in the grid below apply only when **[4 - Round Currency]** is enabled. When that option is disabled, Rounding is not in use.

Rounding 163.336 to a two-digit currency

Option 5	Option 6	Result
OFF - Round to nearest 5	OFF - Round on least significant	163.35
ON - Round to nearest 0	OFF - Round on least significant	163.30
OFF - Round to nearest 5	ON - Round on second-least significant	163.50
ON - Round to nearest 0	ON - Round on second-least significant	163.00

Rounding 163.336 to a three-digit currency

Option 5	Option 6	Result
OFF - Round to nearest 5	OFF - Round on least significant	163.335
ON - Round to nearest 0	OFF - Round on least significant	163.340
OFF - Round to nearest 5	ON - Round on second-least significant	163.350
ON - Round to nearest 0	ON - Round on second-least significant	163.300

See also

Currency	Currency · Currency Availability · Currency Conversions · Currency Parameters · **Currency Rounding** · Currency (PMC Procedure)
Learning series: Currency	

Customer Receipt

A **Customer Receipt** is a paper copy record of a Fast Transaction. A paper copy of any other type of transaction is a Guest Check. Customer receipts may be programmed to print all of the transaction detail, or just the summary data (i.e., subtotal, tax, gratuity if any, amount paid, etc.) Customer receipts are usually printed on roll printers.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses functionality that relates to **Printing**.

Data Extension

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony 2.0.

This article discusses a **technical topic** that is not intended for all readers.

A **Data Extension**, sometimes discussed in the plural or generalized as **Extension Data**, is a user-configurable data type that can be added to existing record types in EMC. Data Extensions are essentially "virtual columns" that are created in the Data Extensions EMC module and then are displayed in the relevant module within EMC.

A Data Extension field is not used by the MICROS application. While EMC provides the means to add these virtual columns and manipulate the data within these columns, there is no native knowledge by MICROS applications about these columns. Instead, the data in these columns are used by SIM, custom scripting, or import/export tools designed by the customer.

One example of a Data Extension is a ZIP code for Properties; by default, the EMC Properties module does not have a configurable ZIP code column. If this information is required for a system, a programmer can add this column in the Data Extensions module, and then the Properties module will display the configurable ZIP code field.

Contents

- 1 EMC Configuration
- 2 Types and Data Constraints
  - 2.1 Text
  - 2.2 Multiline Text
  - 2.3 Number and Decimal
  - 2.4 Boolean
  - 2.5 Date
  - 2.6 Time
  - 2.7 Date/Time
  - 2.8 Text List and Big Text List
  - 2.9 Lookup List
  - 2.10 XML Document
- 3 Usage in EMC Modules
- 4 See also

EMC Configuration

The **Data Extensions** module is located on the Enterprise Scope of EMC. It is a standard Table View/Form View module, however there is no Form View. This module is generally restricted to system administrators.

The configurable fields are as follows:

Object Number
: This column displays the object number of the record.

Table
: This column displays the database table that will be extended (the table that will display the extra columns). Not all record types are listed; currently only a few tables are extendable.

Extra Column Name
: Enter the name of the extra column for the selected table. By default, column names are created using a randomly-generated number; all columns for a single table must be unique, so this random number guarantees uniqueness when creating records in this module.

Type
: In this column, select the type of data for each extra column. The Data Constraints column displays relevant settings based on the configuration of this field.

For more information about Types and Data Constraints, see below.

Data Constraints
: This column's behavior is based on the setting of the "Type" cell for the same row. In this field, select the button to open a dialog that allows the appropriate Data Constraints to be applied for this value. When the Type field is set to "Boolean" or "XML Document", this column is disabled.

Sort Priority
: In Table View, all Data Extension columns are displayed after the primary configuration columns; this Sort Priority setting determines the order in which the Data Extension columns will be displayed in EMC. For example, if Menu Item Masters have three data extension columns, their sort priority will determine which column is first, second, and third. ***Note:*** *multiple columns for a single table are allowed to have the same Sort Priority; in this case, EMC will sort alphabetically within the Sort Priority ("ColumnA" will precede "ColumnB" if both have a Sort Priority of 3). Also, columns with a Sort Priority of 0 are displayed last.*

Display Width
: In this column, enter the width of the column for its display in Table View. When this value is 0, EMC will default to 150 when the column is displayed. The value here may require some trial-and-error by a programmer, consisting of saving this field and then opening the module, and continuing this process until the column "looks right."

Translatable Name
: Enter a translatable name, if any, that will be used to describe this field. If this field is blank, the "Extra Column Name" value will be used instead.

Translatable Help
: Enter translatable Context Sensitive Help, if any, that will be used for this field.

Is Editable
: Check this box if this column can be edited in EMC. This field is provided for instances where Data Extensions are managed by custom imports; by setting this to "false", EMC will display the imported value without allowing any changes to it.

Is Viewable
: Check this box if this column can be viewed in EMC. This field is provided for instances where Data Extensions are managed by custom imports; by setting this to "false", EMC will not display the column.

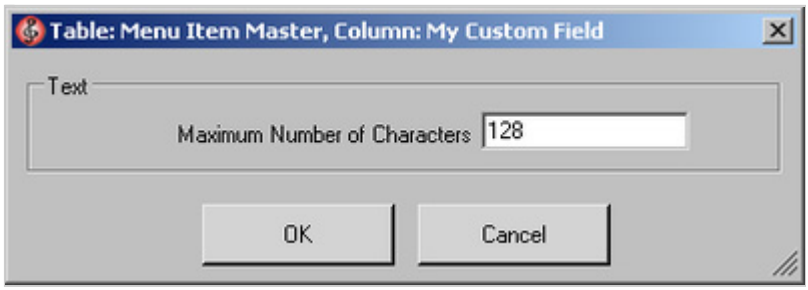
Types and Data Constraints

The values of the "extra columns" that display in a module are stored in the database as text. However, if EMC allowed free text for all Data Extension columns, this could lead to programming errors such as typos or other unexpected values entering the database. By using the Type field in conjunction with the Data Constraints field, EMC can prevent and/or enforce that only specific values are stored in the database.

In the Data Extensions module, the Data Constraints column has an ellipsis button ([...]); this is active for all types except Boolean and XML Document. When the button is clicked, a dialog will appear to allow the Data Constraints to be entered. The different data types are listed below.

Text

When **0 - Text** is the selection, the Data Constraints dialog allows a single entry: the number of characters that can be entered for the field. The valid range is 0-9999 characters.

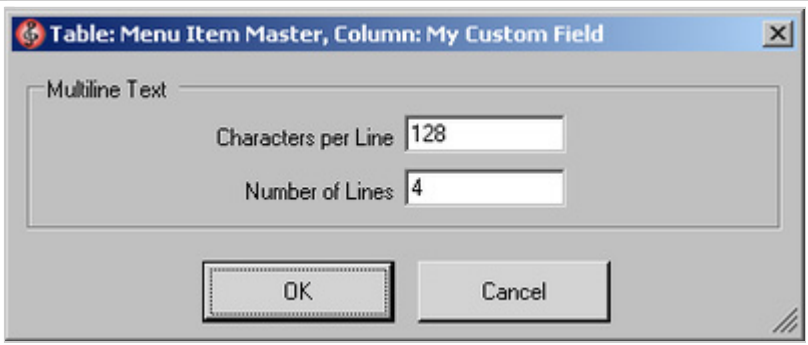


The Data Constraints dialog for a Text field.

Text data types are used when the field allows text only, and also when there are no other relevant Data Constraints available for the type of data being used. For example, if a user wants to store date values in the format "July 29, 2009", there is no Data Constraint available that will allow this type of configuration; the Text type should be used instead.

Multiline Text

When **1 - Multiline Text** is the selection, the Data Constraints dialog allows entries for the number of characters per line, and the number of lines. The valid range for characters is 0-9999; the valid range for lines is 0-99.

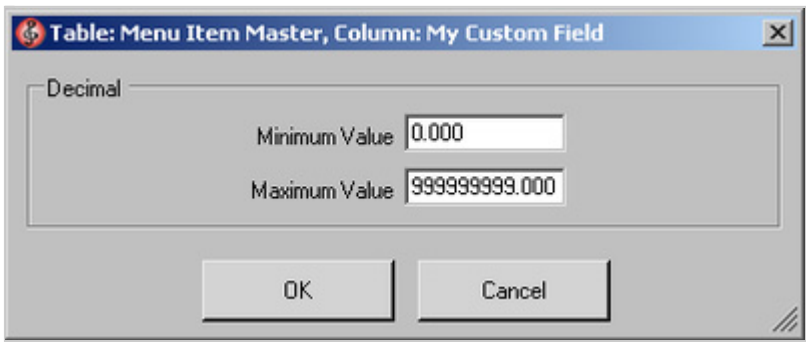


The Data Constraints dialog for a Multiline Text field.

Number and Decimal

When **2 - Number** or **3 - Decimal** is the selection, the Data Constraints dialog allows the start and end values that constitute a valid range for the data. EMC allows a minimum of 0 and a maximum of 999,999,999 for these min/max fields.

The difference between the Number and Decimal types: A "Number" type allows integers only, whereas a "Decimal" type allows fractional units.



The Data Constraints dialog for a Number field.

Boolean

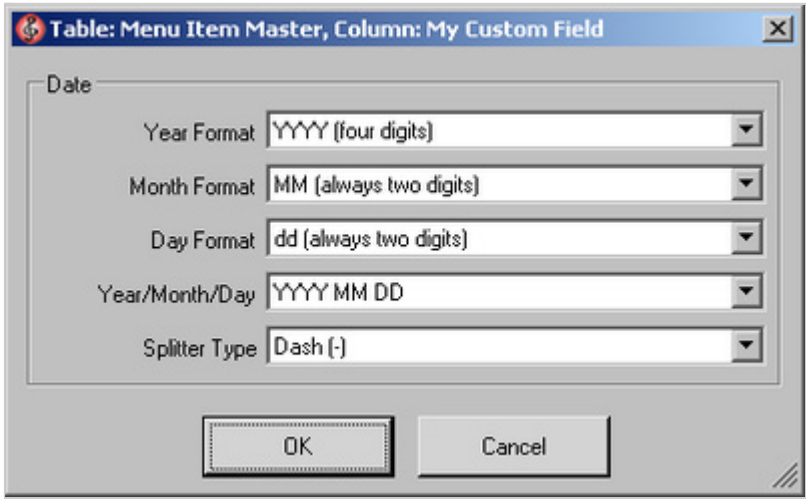
The **4 - Boolean** data type does not allow Data Constraints to be entered. When a Data Extension has this type, EMC will display a checkbox column for the field. The data will be stored in the database as "True" or "False", based on the checked/unchecked status of the field.

Some users may want a boolean field to store as 0/1 or T/F, or some other combination. If this is the case, the Text List choice should be used.

In addition to the True/False values, the default for this column is a greyed-out check; this is known as a three-state checkbox. When an item is in the third state (neither true nor false), the value written to the database for this cell is a blank string. This behavior is desired for records that are not using this particular Data Extension.

Date

When **5 - Date** is the selection, the Data Constraints dialog allows selections for the year, month, and day formats, as well as the order in which those fields will be displayed, and the type of separator that will be used:



The Data Constraints dialog for a Date field.

Year Format

- **YYYY** - a four-digit representation, such as "2009"
- **YY** - a two-digit representation, such as "09"

Month Format

- **MM** - a two-digit representation, where single-digit months include a leading zero. For example: 08, 09, 10, 11
- **M** - a representation where single-digit months do not include a leading zero. For example: 8, 9, 10, 11

Day Format

- **dd** - a two-digit representation, where single-digit days include a leading zero. For example: 08, 09, 10, 11
- **d** - a representation where single-digit days do not include a leading zero. For example: 8, 9, 10, 11

Year/Month/Day

- **YYYY MM DD** - the year, month, and day. For example: 2009-07-26 (July 26, 2009).
- **DD MM YYYY** - the day, month, and year. For example, 26-07-2009 (July 26, 2009).
- **MM DD YYYY** - the month, day, and year. For example, 07-26-2009 (July 26, 2009).

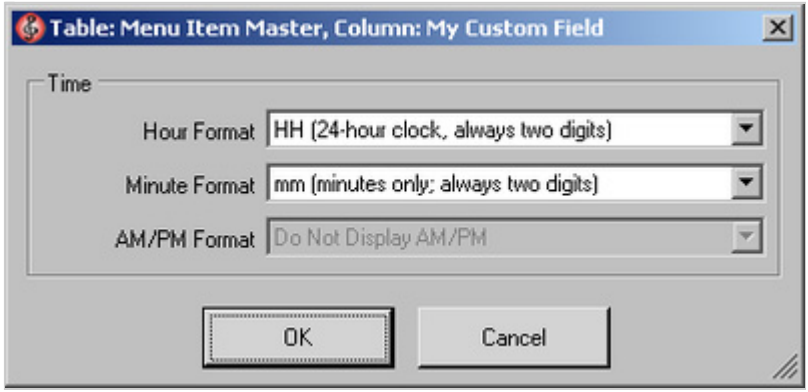
The Year/Month/Day choices show YYYYMMDD. This is simply the method that EMC uses to demonstrate the order of the three fields; it does not indicate the format (YYYY vs. YY, etc.) of the fields. The format of the fields is determined by the Year Format, Month Format, and Day Format fields only.

Splitter Type

- **Dash (-)** - a dash will be used to separate the information; for example, 2009-07-26.
- **Slash (/)** - a slash will be used to separate the information; for example, 2009/07/26.

Time

When **6 - Time** is the selection, the Data Constraints dialog allows selctions for the hour format, minute format, and the AM/PM indicators. The data is stored as **`HH:mm:ss tt`**; the hour/minute selections, optionally followed by a space and the AM/PM indicator. The following options are available:



The Data Constraints dialog for a Time field. This image shows the AM/PM Format field disabled; this is the behavior when the Hour Format does not use AM/PM indicators.

Hour Format

- **HH** - a two-digit representation using a 24-hour clock, where the values are 00-23. "1 AM" will display as 01:00 and "1 PM" will display as 13:00.
- **H** - a representation using a 24-hour clock where single-digit hours do not include a leading zero. For example, "1 AM" will display as 1:00 and "1 PM" will display as 13:00.
- **hh** - a two-digit representation using a 12-hour clock, where the values are 00-12. "1 AM" will display as 01:00 and "1 PM" will display as "01:00". The AM/PM Format is generally used with this selection.
- **h** - a representation using a 12-hour clock, where single-digit hours do not include a leading zero. For example: 8:00, 9:00, 10:00, 11:00. The AM/PM Format is generally used with this selection.

Minute Format

- **mm** - a two-digit representation of the minutes within an hour. For example, 09:08, 09:09, 09:10, 09:11.
- **m** - a representation of minutes within an hour, where single-digit minutes do not include a leading zero. For example: 09:8, 09:9, 09:10, 09:11. This option is used infrequently.
- **mm:ss** - a two-digit representation of the minutes and seconds. For example: 09:08:09, 09:08:10.

AM/PM Format

This field is enabled only when the Hour Format is "hh" or "h".

The Data Constraints column displays the AM/PM indicator value as a "tt" or "t".

- **Do not Display AM/PM** - the AM/PM indicator is not displayed.
- **Display "A" or "P"** - the AM/PM indicator is a single character: A or P.
- **Display "AM" or "PM"** - the AM/PM indicator is AM or PM.

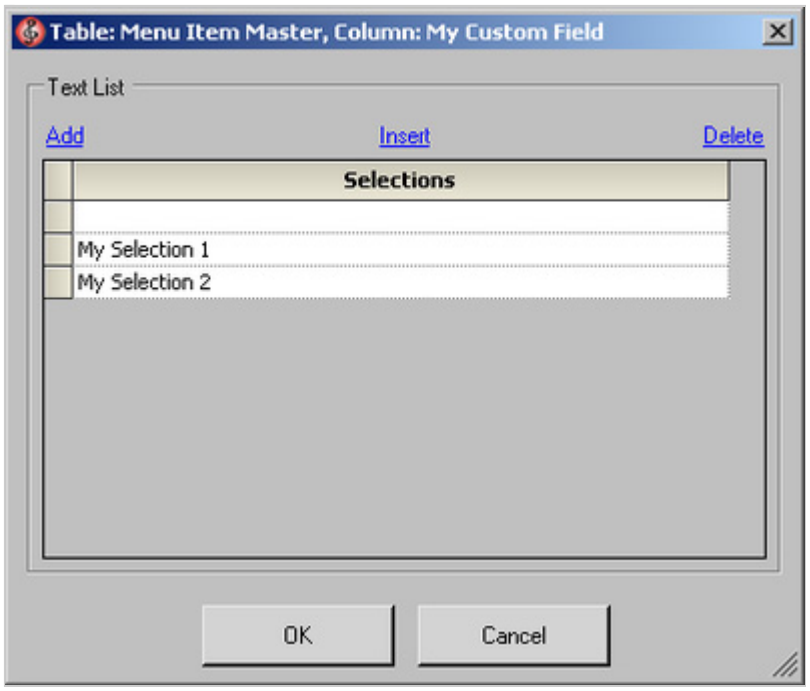
Date/Time

When **7 - Date/Time** is the selection, the Data Constraints dialog allows selections for the fields discussed in the Date type and the Time type. The data is stored as **`YYYY-MM-DD HH:mm:ss tt`**; the date format followed by a space, followed by the time format.

Text List and Big Text List

When **8 - Text List** or **10 - Big Text List** is the selection, the Data Constraints dialog provides the means for a programmer to list the valid selections. The difference between the "Text List" and the "Big Text List" is the presentation of the data to the user in the EMC module where the data is being displayed:

- **Text List** - the list of choices is presented to the user as a drop-down list. This data type is generally used when the list of selections is small (10 items or fewer).
- **Big Text List** - the list of choices is presented to the user with a pop-up selection dialog. This data type is generally used when the list of selections is large. The pop-up selection dialog includes a text filter, which makes it ideal for finding items in large lists.



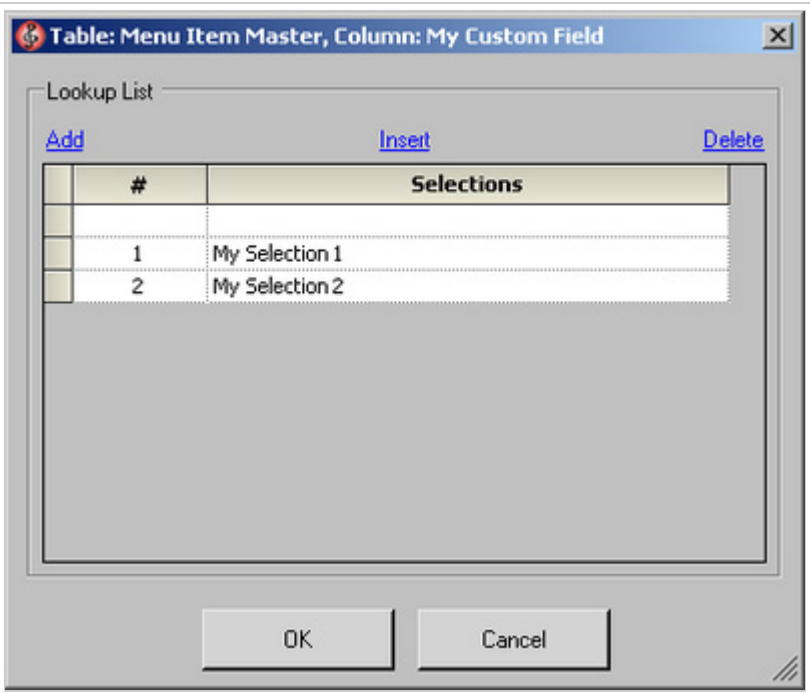
The Data Constraints dialog for a Text List or Big Text List field. In this example, the user has configured two selections in addition to the default blank row.

From this dialog, a programmer can use the Add link to create a new selection, the Insert link to create a new selection before the selected row, or the Delete link to delete selected rows. Note that the first row is a blank; there is no way to remove this item. Also, EMC prevents a user from making changes in this dialog if two selections are configured with the same value.

Lookup List

When **9 - Lookup List** is the selection, the Data Constraints dialog provides the means for a programmer to list the valid selections. Unlike the "Text List" and "Big Text List" types, a lookup list stores the numeric value in the database. This numeric value then represents the text that is displayed; this is no different than selecting a Major Group when configuring a Menu Item Master. Lookup lists are used in situations where a programmer is using an enumerated type; the lookup selections are thus programmed to represent the key/value pairs in the enumeration.

From this dialog, a programmer can use the Add link to create a new selection, the Insert link to create a new selection before the selected row, or the Delete link to delete selected rows. ***Note:*** *Note that the first row is a blank; there is no way to remove this item. Also, EMC prevents a user from making*



The Data Constraints dialog for a Lookup List. In this example, the user has configured two selections in addition to the default blank row.

changes in this dialog if two selections are configured with the same numeric value.

XML Document

The **11 - XML Document** data type does not allow Data Constraints to be entered. When a Data Extension has this type, EMC will display a hyperlink cell ("Edit Xml") for the field. After the link is clicked, EMC will open a dialog that allows XML text to be entered.

Usage in EMC Modules

After Data Extensions have been configured in the Data Extensions module, the extra columns appear in other modules, allowing other records to be configured using these virtual columns. For more information, see Data Extensions in EMC.

Data Extensions in EMC

A Data Extension is a user-configurable data type that can be added to existing record types in EMC. This article discusses **Data Extensions in EMC**; after configuring a Data Extension (see Data Extension: EMC Configuration), columns display in Table View and on the Data Extensions tab in Form View in the module for which the Data Extension was programmed. The Data Extension article should be read as a prerequisite to this article; the Types and Data Constraints section of that article is especially important for this discussion.

This article relates to general EMC functionality or knowledge.

This feature or functionality was introduced in Simphony 2.0.

This article discusses a **technical topic** that is not intended for all readers.

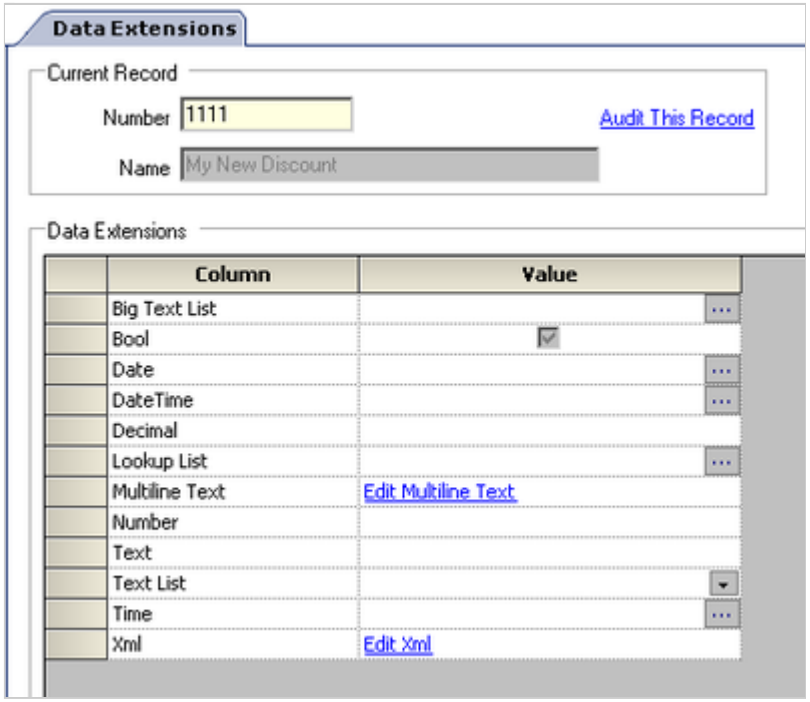
Contents

- 1 Examples
  - 1.1 Big Text List
  - 1.2 Boolean
  - 1.3 Date, Date/Time, Time
  - 1.4 Decimal, Number, and Text
  - 1.5 Text List
  - 1.6 Multiline Text
  - 1.7 Lookup List
  - 1.8 XML Document
- 2 General Information
  - 2.1 Data Validation
  - 2.2 Disabled Cells
  - 2.3 Context Sensitive Help
  - 2.4 Translatable Name
  - 2.5 Audit Trail
- 3 See also

Examples

The examples in this article are based on the sample configurations shown in the Data Extension article. All twelve Data Extension types (0-11) will be discussed here, using generic column names ("Big Text List" or "Text", etc.) for simplicity. The example image on the right shows the Data Extensions panel from Form View for a Discount record. In this example, all Data Extension records have a sort priority of "0", so the fields are sorted

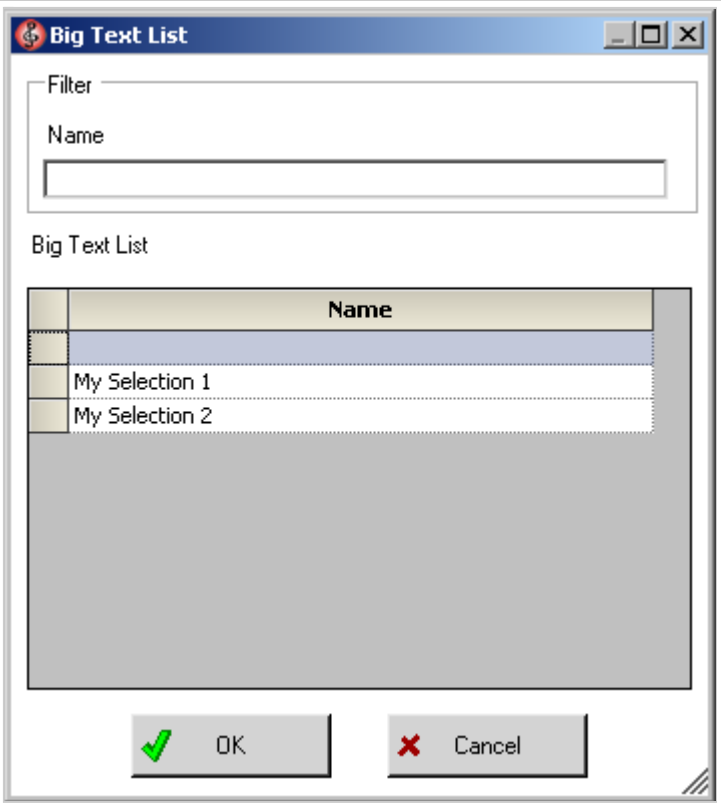
alphabetically. In addition, the image shows the Data Extensions panel before any of the fields have been configured — all fields are blank, and the Bool field is set to the "three state" (see Data Extension: Boolean for more information).



The Data Extensions tab in Form View.

Big Text List

The **Big Text List** field is configured by using the ellipsis ([...]) button in the cell. When pressed, the popup selection dialog will display all the choices. Like other selection dialogs, the list can be filtered so a user can quickly find a record. Note that the first row is the blank row that is always present in Data Extension selection lists (see Data Extension: Text List and Big Text List for more information).



The **Big Text List** selection dialog.

Boolean

The **Boolean** cell type (labelled "Bool" in the example image) is a checkbox.

Date, Date/Time, Time

The **Date**, **Date/Time**, and **Time** fields are configured by using the ellipsis ([...]) button in the cell. When pressed, the Date/Time dialog is displayed. From this dialog, a user can type or select the dates and/or type the time. By leaving the checkbox unchecked, a blank value will be used for the data.

The **Date** selection dialog.

The **Date/Time** selection dialog.

The **Time** selection dialog.

Decimal, Number, and Text

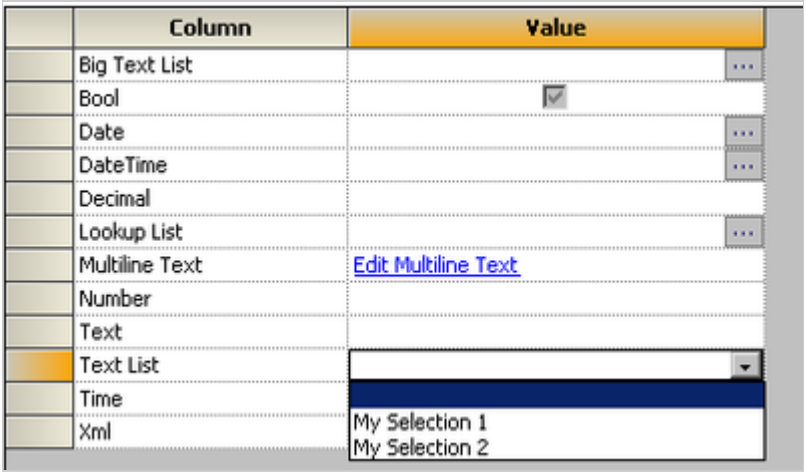
The **Decimal**, **Number**, and **Text** fields allow direct entry. The maximum number of characters that can be entered is determined by the type of field:

Decimal and Number fields are also validated on save; see Data Validation for more information.

- Text fields are configured with a "Maximum Number of Characters" setting in the Data Extensions module. The default is 128..
- The maximum number of characters for a number field is determined by the maximum value allowed for the field. For example, if the valid range is 1-100, only three digits are allowed because the maximum (100) has three digits.
- Decimal fields always allow 12 characters, which incorporates the numbers before and after the decimal.

Text List

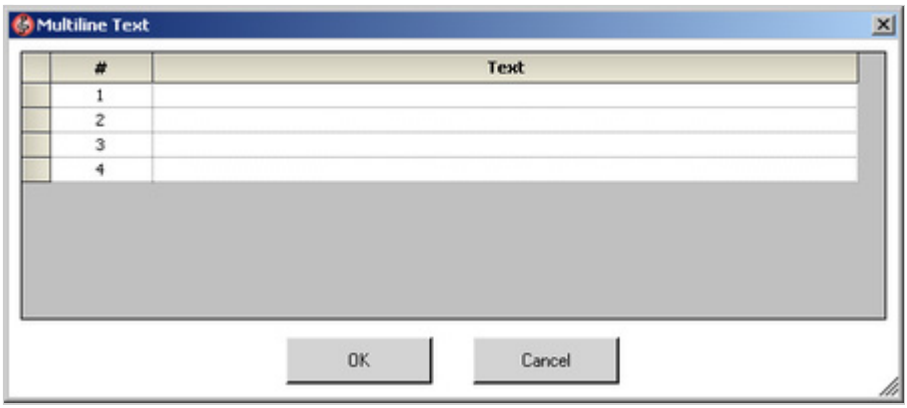
The **Text List** field is a standard drop-down cell. The first selection is a blank, followed by the list configured in the Data Extensions module.



An image of a **Text List** cell showing its selections.

Multiline Text

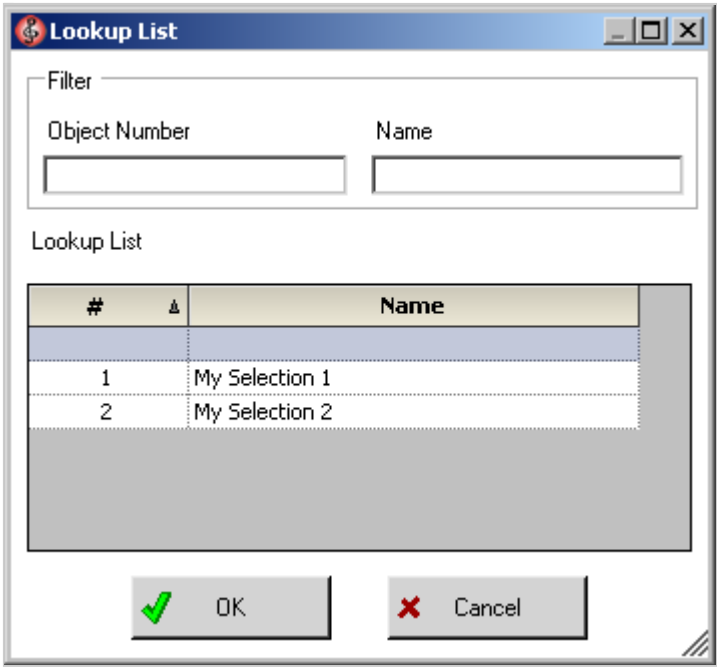
The **Multiline Text** field is a link ("Edit Multiline Text"). When clicked, the popup dialog displays the configurable rows for the field. The number of rows and the number of characters per row is configured in the Data Extensions module.



The **Multiline Text** entry dialog.

Lookup List

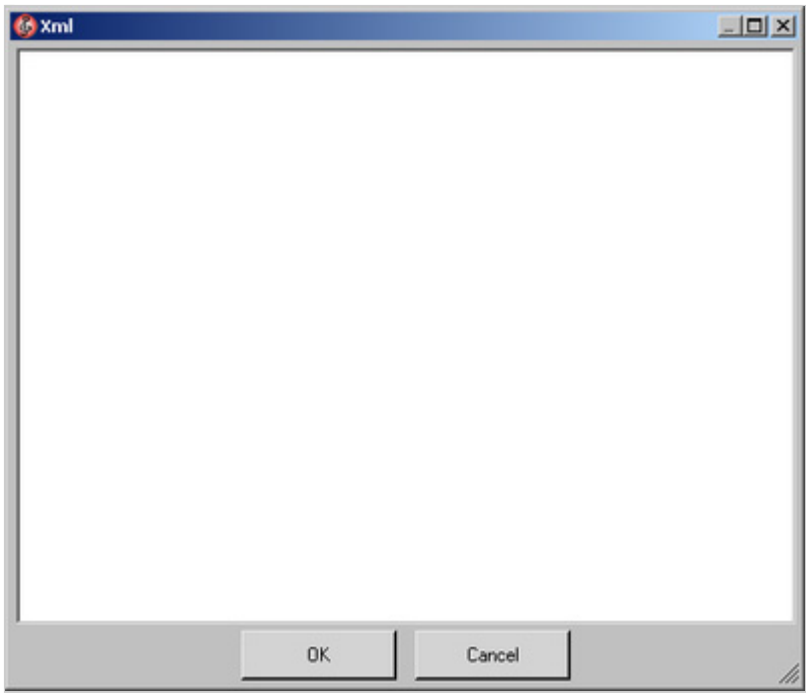
The **Lookup List** field is configured by using the ellipsis ([...]) button in the cell. When pressed, the popup selection dialog will display all the choices. Like other selection dialogs, the list can be filtered so a user can quickly find a record. Note that the first row is the blank row that is always present in Data Extension selection lists (see Data Extension: Lookup List for more information).



The **Lookup List** selection dialog.

XML Document

The **XML Document** field is a link ("Edit Xml"). When clicked, the popup dialog is a large textbox, allowing XML data to be entered. When a user presses **[OK]** to close the dialog, EMC validates the XML before closing; if the text is not a valid XML, the dialog will remain open.



The **XML Document** entry dialog.

General Information

The following information should also be considered when using Data Extension columns in EMC.

Data Validation

The controls used to display the data provide one method of constraining the data to valid values. However, the number and decimal fields are not validated until the user attempts to save the record. For example, a number field may be programmed to allow values 1-100. In EMC, a user can set the values of this field from 0-999 — this is allowed because the field allows three characters — but when the record is saved, an error will be displayed if the values do not fall in the required range.

Disabled Cells

As with any field in EMC, if a user can view but not edit a record type (based on Employee Role privileges), the field will be disabled. In addition to that, each Data Extension column can be configured with the "Is Editable" attribute; if this is set to false, the individual column (in Table View) or the row (in the Data Extensions tab) will be disabled.

For all fields except the **Multiline Text** and **XML Document** types, a disabled cell does not allow user-entry and the ellipsis button (if any) is disabled. For Multiline Text and XML Documents, the link can be clicked so that the user can view the data that is configured, but no changes are allowed in the dialog.

Context Sensitive Help

In Table View, a right-click on the header of a column will display the Context Sensitive Help (CSH), if any, for the Data Extension. In Form View's Data Extensions tab, CSH is displayed when a user right-clicks the name of the Data Extension column (in the sample image above: Big Text List, Bool, Date, etc.).

Translatable Name

Each Data Extension must be programmed with an "Extra Column Name"; the "Translatable Name" can be programmed optionally. If the Translatable Name value is not blank, EMC will use the Translatable Name as the column header. This logic progression is used to determine the value in the header column:

The logic progression described here is also used for determining the CSH to display.

1. If the EMC user's default language has a translation that is not blank, use this value.
2. If there is a translation for the base language (Language #1), use this value.
3. Use the "Extra Column Name".

Audit Trail

When the changes are made to a record, Audit Trail will always use the "Extra Column Name" as the field being changed; the "Translatable Name" is only used as a convenience in EMC.

Descriptors

Descriptors is a tab on the EMC Home Page that includes a number of EMC modules. Every module on this page has similar characteristics. In each module:

1. It is not possible to add new records because each type of descriptor has a fixed number of items available; a user can edit records, override records or delete records that are overriding, but new records cannot be created.
2. The only configurable field is the name of the descriptor.

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony 2.0.

This article describes the modules listed and the purpose of the data being configured. Note that not all modules are available at every location of EMC; due to some legacy programming rules, some modules are not available in RVCs. (More about this topic is discussed below.)

Contents

- 1 Reasons
- 2 Headers/Trailers
- 3 Miscellaneous
- 4 Groups
- 5 SLU Names
- 6 Itemizers
- 7 Module Availability

Reasons

Payment Reasons
: 32 reasons describing why a Tender/Media record was used.

Loan Reasons
: 32 reasons describing why a Loan record was used.

Pickup Reasons
: 32 reasons describing why a Pickup record was used.

Service Total Reasons
: 32 reasons describing why a Service Total record was used.

Void Reasons
: 32 reasons describing the reason for a Void.

Time Clock Reasons
: 16 reasons describing a user's Clock In/Out status.

The four Tender Reasons (Payment Reasons, Loan Reasons, Pickup Reasons, and Service Total Reasons) are used to prompt the operator for a reason a tender is being used; it is similar to a Reference Entry but it allows finer control. A tender will prompt the user when the Tender/Media option bit, **[82 - Prompt for Reason]**, is enabled.

Headers/Trailers

Guest Check Headers
: Three lines that appear on the top of Guest Checks.

Guest Check Trailers
: 12 lines that appear at the bottom of Guest Checks.

Customer Receipt Headers
: Three lines that appear on the top of Customer Receipts.

Training Headers
: Three lines that appear on the top of checks while an employee is in Training Mode.

Credit Card Headers
: Six lines that appear on the top of Credit Card Vouchers.

Credit Card Trailers
: 12 lines that appear on the bottom of Credit Card Vouchers.

Check Endorsement Lines
: Three lines that are printed during Check Endorsement Printing jobs; see also: Slip Printer: Check Endorsement Printing.

With the exception of the **Check Endorsement Lines** module, each of the **Headers/Trailers** modules contains the "Use Logo" and "Logo" columns. These settings allow a logo to be printed, instead of a single line of text. When viewing changes to these records in Audit Trail, the text `^^[pl3]` (where "3" represents the object number of the Print Logo) represents that a logo has been selected.

Miscellaneous

Check Summary Descriptors
: The names of the text that displays in the Check Summary Area of a workstation.

Guest Information Prompts
: The names of the 10 types of Guest Information Lines.

Canadian Tax Trailers
: Six lines that are printed in at the bottom of Guest Checks and Receipts; used conjunction with Canadian Tax settings.

Thai Tax Descriptors
: The names of the Thai Tax Identification and Thai RD Numbers.

Order Types
: The names of the eight Order Types.

The **Check Summary Descriptors**, **Guest Information Prompts**, and **Thai Tax Descriptors** modules include a non-configurable "Type" column. In these modules, the "Type" is generally more important to the programmer than the object numbers that are displayed. Also note that the object numbers in **Thai Tax Descriptors** and **Check Summary Descriptors** do not start at "1" and increment; instead, these items use specific object numbers that are unique to the type of record. As with all records, the object numbers cannot be changed.

Groups

Condiment Group Names
: Names of the 64 Condiment Groups.

Course Names
: Names of the 32 Courses.

NLU Names
: Names of the 32 NLU Groups.

Revenue Center Groups

Names of the 32 RVC Type Names.

Discount Groups
: Names of the 32 Discount Groups.

SLU Names

These modules allow the SLU names to be configured. There are two modules for each type of SLU: "Regular" SLUs and MMH SLUs.

Menu Item SLUs
: 127 SLUs for Menu Items.

Discount SLUs
: 64 SLUs for Discounts.

Service Charge SLUs
: 64 SLUs for Service Charges.

Tender/Media SLUs
: 64 SLUs for Tender/Media records.

Itemizers

Sales Itemizers
: Names of the 16 Sales Itemizers.

Discount Itemizers
: Names of the 15 Discount Itemizers.

Service Charge Itemizers
: Names of the eight Service Charge Itemizers.

Module Availability

To remain backwards-compatible, some of the descriptors modules are not available on the RVC Scope. This implementation is intentional; while some modules are programmable in Properties, Zones, or the Enterprise only, the following list of modules are programmable for any location, including RVCs:

- Canadian Tax Trailers
- Check Endorsement Lines
- Check Summary Descriptors
- Condiment Group Names
- Course Names
- Credit Card Headers/Trailers
- Customer Receipt Headers
- Guest Check Headers/Trailers
- Guest Information Prompts
- Menu Item SLUs
- NLU Names
- Sales Itemizers

In the **Check Summary Descriptors** module, the descriptor type, "Non-Taxable Sales" is not available in Revenue Centers. This record will be omitted when opening the Check Summary Descriptors from a RVC. In the legacy EMC, this record was configured in the Tax Table at the Property-Level

- Thai Tax Descriptors
- Time Clock Reasons
- Training Headers

Discount Engine

Contents

- 1 Introduction
- 2 Permutations
- 3 Operations
- 4 Priorities
- 5 Discount Engine Operation
- 6 Discount Engine Examples
- 7 Discount Engine Optimizations
- 8 See also

This article contains information for **Simphony v1** and **Simphony v2**.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses a **technical topic** that is not intended for all readers.

Introduction

This article discusses the math behind the Discount Engine used in both versions of Simphony. The Discount Engine is called whenever an Automatic or Automatic Coupon discount is to be applied to a check.

The Discount Engine is called after every menu item is rung up OR once at the end of a transaction. When called, the Discount Engine will examine the transaction menu items and the automatic discounts and apply any discounts that may be active.

Permutations

The fundamental concept that must be understood when using the Discount Engine is that of permutations. A permutation is collection of things where their order is important - for instance, a lock code. For example, assume that someone possesses, three different items called A-B-C and sets them before them. How many different ways can these items be lined up in a row (answer is in the chart)? The number of variations the items can be uniquely arranged in is the number of permutations.

There is a related mathematical concept called a Combination in which the order in which the items are arranged does not matter. The same three items which have 6 permutations, only have 1 combination - ABC, because it is not necessary to track which item is in which position.

Number of Items	Number of Permutations	Permutations
1	1	A
2	2	AB BA
3	6	ABC ACB BAC BCA CAB CBA
4	24	
5	120	
6	720	

The chart shows some examples of permutations and how they can quickly grow as the number of items involved in the permutation grows.

10	3,628,800	
20	2,432,902,008,176,640,000	

When the discount engine tries to apply multiple discounts to a transaction, it needs to run through all the permutations in order to calculate the best deal. Clearly as the number of applicable discounts increases, the number of permutations increases, and the amount of time to calculate the best deal increases.

Since it is impossible to compute large numbers of permutations in a short amount of time (2 seconds or less), the discount engine implements many optimizations and provides the user with many configuration options to reduce the calculation time. (If the Discount Engine had to compute the permutations of 20 discounts and it could calculate 1 billion per second, it would take 77 years to find the “best deal”)

Operations

The best way to introduce how the discount engine calculates discounts is to provide some examples. The following table displays how 2 different discounts are applied to a transaction with one appetizer.

To compute the discounts which are applied to a transaction, the Discount Engine will:

- Run all possible discounts against a transaction
- Apply the combination of discounts that yields the best deal for the customer

Transaction	Available Discounts	Discounts Applied
Appetizer - $10.00	▪ 10% Off Appetizers	Appetizer is $9.00
Appetizer - $10.00	▪ $2 Off Appetizers	Appetizer is $8.00
Appetizer - $10.00	▪ 10% Off Appetizers ▪ $2 Off Appetizers ▪ Only one discount can be applied	Appetizer is $8 ($2 off is a better deal)
Appetizer - $25.00	▪ 10% Off Appetizers ▪ $2 Off Appetizers ▪ Only one discount can be applied	Appetizer is $22.50 (10% off is a better deal)
Appetizer - $10.00	▪ 10% Off Appetizers ▪ $2 Off Appetizers ▪ Only one discount can be applied	Appetizer is $7 (10% off first, $2 applied after)

Priorities

Priorities in the DE allow the programmer to change the order in which discounts are run. By changing the priority of a discount, it will run in it's own priority level rather than with the other priority-0 discounts.

The best deal from each priority level will be applied to the transaction in priority order.

The following tables shows how one can change the Discount Engine operations by modifying the priorities:

Insert Chart here....

Note that Sales Price discounts always run before other discounts.

Discount Engine Operation

The programming changes to modify how the DE runs are:

Insert Chart here...

Discount Engine Examples

Perhaps the best way to tie all these concepts together is to describe the steps that occur when the Discount Engine determines the applicable discounts.

Insert chart here:

Discount Engine Optimizations

When the number of discounts that can automatically apply to a transaction exceeds 10, the DE may take too long to calculate all of the possible combinations of discounts in order to get the best deal.

It is possible to optimize the calculations using the methods in the chart

Method	Description
Exclusivity	Whether simple or group, exclusivity cuts down on the number of calculations that must be performed
Reduce number of active discounts	If the two or more discounts can be 'merged' into one discount, then the number of combinations is decreased
Use Item Price Substitution	Sales Prices aren't run using combinations; the use of Sales Price discounts instead of Item Price Substitution discounts will dramatically increase the execution time

Use priorities	Separate groups of discounts can be separated into prioritized strata of discount groups

See also

Discounts	Discount · Manual Discount · Automatic Discount · Automatic Coupon Discount · Automatic Discounts for Decimal Quantity Menu Items · Combination Pricing Discount · Item Price Substitution Discount · Quantity Threshold Discount · Sales Price Discount · Total Price Threshold Discount · **Discount Engine** · Discount Exclusivity · Discount NLU · Menu Item Group · Revenue Center Group
Learning series: Discounts	

Discount Exclusivity

Contents

- 1 Understanding discount exclusivity
  - 1.1 Simple exclusivity
  - 1.2 Group exclusivity
- 2 Interaction between automatic and manual discounts
- 3 Using discount exclusivity
  - 3.1 Example transactions
    - 3.1.1 Automatic discounts
    - 3.1.2 Manual discounts
- 4 See also

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses a **technical topic** that is not intended for all readers.

Understanding discount exclusivity

Discount exclusivity is a concept that controls how multiple discounts interact with each other. You can configure discounts to be exclusive per transaction, exclusive per item, or exclusive based on user-defined groups. In short, discount exclusivity stops discounts from applying multiple times to the same items.

Discount exclusivity applies in these situations:

- A senior citizen discount coupon cannot be used at the same time as a *25% off all items* discount.
- A *buy one get one free* discount cannot be applied to a transaction that also has a *buy $100, get 25% off* discount.
- The customer's 10% coupon cannot be applied to items that get the Happy Hour discount.

You can configure two types of discount exclusivity: *simple exclusivity* and *group exclusivity*. Simple exclusivity is easier to use and configure. Group exclusivity yields greater flexibility, but at the price of complexity.

Simple exclusivity

The following three discount options apply to simple exclusivity (in *EMC* > *Enterprise / Property / Zone* > *Configuration* > *Discounts* > *General*):

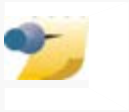
Field	Description
9* - Simple Item Exclusivity	When you select this option, only this discount can be applied to a menu item. This prevents individual items from being discounted more than once. When this option is unselected, the Exclusivity Group settings determine how this discount interacts with other discounts.
23* - Simple	When you select this option, only this discount can be applied to a single check. This prevents the check

Transaction Exclusivity	from being discounted more than once. When this option is unselected, the Exclusivity Group settings determine how this discount interacts with other discounts.
24 - Discount is Final	When you select this option, no additional discounts can be applied to the transaction after this discount posts. (This option works in automatic discount transactions only.)

*In the case of options 9 and 23, if other discounts that are better deals can apply to the item or transaction, the better deal discounts will apply.

Group exclusivity

Group exclusivity is sometimes a difficult concept to grasp, but it is important as it lets you configure the manner in which possibly hundreds of discounts interact. An understanding of group exclusivity is crucial for long-term discount configuration.



There are 32 Exclusivity Groups per property. You can configure the names of these groups in Property Descriptors. Each discount can belong to none, all, or some Exclusivity Groups.

When two discounts are *exclusive* to each other, it means that only one discount applies. This exclusiveness can apply either per transaction or per menu item:

- If two discounts are transaction exclusive to each other, then only one can be applied to the same transaction. The discount that provides the best deal is applied to the check.
- If two discounts are item exclusive to each other, only one can be applied to a specific menu item. Two discounts that are item exclusive can both be present on a transaction, but only applied to different menu items. Again, the discount that provides the best deal is applied to the item.

Transaction exclusivity

Given the configuration shown, the following occurs:

- Discounts A and B cannot appear on the same transaction because they both belong to the first group
- Discounts A and C cannot appear on the same transaction because they both belong to the second group
- Discounts B and C can appear on the same transaction because they do not belong to the same groups
- Discount D can appear on any transaction with A, B, and C because it does not belong to any group

Discount	In Exclusivity Group 1	In Exclusivity Group 2
A	Yes	Yes
B	Yes	No
C	No	Yes
D	No	No

This example shows a configuration with only two groups. The combinations become more complex (yet more flexible) when using all 32 groups in the property.

Item exclusivity

Given the configuration shown, the following occurs:

- Menu Item "x" is discounted by A or B, but not both. Discounts A and B are exclusive to each other.
- Menu Item "y" is discounted by A *and* C. These discounts are not exclusive to each other, so they may

Discount	In Exclusivity Group 1	Menu Items Affected by Discount
A	Yes	x, y
B	Yes	x

both discount the same item(s).

C	No	y

Interaction between automatic and manual discounts

Automatic discounts always recalculate after you add or remove any entry from a check. Because of this, automatic discounts are always applied *after* manual discounts. Consider the following example:

- The revenue center is configured with automatic discounts enabled in the RVC Parameters module
- One automatic discount is active: all food is 10% off
- A manual discount is configured, and it allows the "10% off all food" discount to be on the check at the same time as the manual discount
- The operator orders $20 of food
- The automatic discount applies on the check for $2

If the operator then adds a manual discount for $5.00 off, the behavior is this:

- All automatic discounts are removed (this occurs internally on the workstation but is listed here to explain the logic)
- The check's total is $15.00 ($20.00 minus the $5.00 manual discount)
- The 10% automatic discount is applied for $1.50, taking the check's total to $13.50

Because of the scenario described here, it is not possible to get a better deal when combining automatic and manual discounts. Either the discounts can both be on the check (as in this example) or the manual discount won't be allowed (if the automatic discount is exclusive to the manual discount). Thus, if it is desirable for manual discounts and automatic discounts to be used in the same environment, the discounts that would normally be manual should be configured as automatic coupon discounts, which follow the best deal rules of the discount engine.

Using discount exclusivity

Example transactions

Automatic discounts

Automatic Discounts and Simple Transaction Exclusivity

Configuration	Transaction
▪ Discount A is $10 - Total Price Threshold Discount that is applied when the transaction is $35 ▪ Discount B is $5 - Total Price Threshold Discount that is applied when the transaction is $20	▪ When the transaction exceeds $20, Discount B is applied ▪ When the transaction exceeds $35, Discount B is removed and Discount A is applied Discount A is the better deal, so it is applied. Discount B cannot be applied because Discount A is using simple transaction exclusivity.

▪ Both discounts:
  ▪ Are simple transaction exclusive
  ▪ Discount "Menu Item Group One", which includes all items on the check	

In this example, the same behavior occurs when *either* of the discounts is configured as simple transaction exclusive (the example shows them *both* configured as simple transaction exclusive). This happens because B is applied first, but then A is applied as the better deal. B cannot be on the check with A, and A wins. If neither discount is simple transaction exclusive, both discounts appear on the check.	

Manual discounts

Manual Discounts: Item Discount with Simple Item Exclusivity

Configuration	Transaction
▪ Discount A is 50% - Item Discount ▪ Discount A has **[Simple Item Exclusivity]** selected ▪ Discount B is 50% - Not an Item Discount ▪ Both discounts: ▪ Discount "Menu Item Group One", which includes all items on the check	▪ Five items, each $10, are ordered ▪ Discount A is applied. A $5.00 discount applies to the check. ▪ Discount B is applied. A $20.00 discount is applied to the check. Because Discount A is Simple Item Exclusive, no other discounts can be applied to this item. When the second discount is applied, it applies to the four other items on the check ($40), for a $20.00 discount.
In this example, Discount A is applied, discounting the last item that is added to the check. When Discount B is applied, it discounts all items *except* the last item because no other discounts are allowed on that item. If Discount A had been configured with Simple Item Exclusivity *unselected*, Discount B would apply to all items on the check including the already-discounted item, and its discount amount would be $22.50 (50% of $45).	

Manual Discounts: Subtotal Discount with Simple Transaction Exclusivity

Configuration	Transaction
▪ Discount A is 50% - Subtotal Discount ▪ Discount B is 50% - Subtotal Discount ▪ Discount A has **[Simple Transaction Exclusivity]**	▪ Five items, each $10, are ordered ▪ Discount A is applied. A $25.00 discount applies to the check. ▪ Discount B is applied. BOB shows the error, `No sales to apply discount to.`

selected ▪ Both discounts: ▪▪ Discount "Menu Item Group One", which includes all items on the check	Because Discount A is Simple Item Exclusive, no discounts can be applied to any of the items that have already been discounted. When the second discount tries to apply, it cannot, and the message appears.

In this example, Discount A applies to all items on the check. When Discount B is entered, it cannot be applied because all items have been discounted by Discount A, which is marked as Simple Transaction Exclusive. If Discount A had been configured with **[Simple Transaction Exclusivity]** *unselected*, Discount B would apply to all items on the check and its discount amount would be $12.50 (50% of $25).

For subtotal discounts, it is technically true that the **[Simple Item Exclusivity]** option works the same as the **[Simple Transaction Exclusivity]** option. When you select either option, the discounted menu items are marked as "no more discounts allowed on this item". While this is true, MICROS recommends avoiding this configuration for easier understanding by the programmer.

See also

Discounts	Discount · Manual Discount · Automatic Discount · Automatic Coupon Discount · Automatic Discounts for Decimal Quantity Menu Items · Combination Pricing Discount · Item Price Substitution Discount · Quantity Threshold Discount · Sales Price Discount · Total Price Threshold Discount · Discount Engine · **Discount Exclusivity** · Discount NLU · Menu Item Group · Revenue Center Group
Learning series: Discounts	

Distribute

For specific information about distributing menu items, see Menu Item Distribution

Contents

- 1 What is Distribute?
  - 1.1 Remote Distribution
  - 1.2 Distribution options
  - 1.3 Configuring record distribution
  - 1.4 How-to
- 2 See also

This article contains a **best practices** section.

This article relates to general EMC functionality or knowledge.

This feature or functionality was introduced in Simphony 1.0.

What is Distribute?

Distribute is an EMC function that allows you to copy records between properties and between revenue centers. Distribution eliminates the need to create and configure a record multiple times. You can configure records once within the EMC and distribute the records throughout the enterprise to multiple properties and revenue centers. Distribution benefits enterprises that maintain uniform records across multiple properties.

When one location distributes records to another location, the object number remains the same. Therefore, it is important to program properties and revenue centers consistently. For example, if record #11 is Room Charge in one property, it should be Room Charge in all properties.

Consider this serving period programmed in revenue center (RVC) 4:

- Object Number: 1
- Default Transaction Touchscreen: 41

When distributing this record to RVC 8, it is created with the object number 1. What is its default Transaction Touchscreen? There are two possibilities:

- If Touchscreen #41 exists in RVC 8, the serving period's default screen is set to 41.
- If Touchscreen #41 does not exist in RVC 8, the default screen is set to 0. This is the standard functionality for all types of distributed records. If the referencing object number does not exist, the value is set to 0.

Remote Distribution

- What is remote distribution?
- Remote distribution best practices

Distribution options

- List of distribution options in Simphony 1.x
- List of distribution options in Simphony 2.x

Configuring record distribution

- Configuration in Simphony 2.x

How-to

- Distribute records
- Remotely distribute records

See also

- EMC functionality
- Menu Item Distribution

Distributing Client Applications from the Local Property Server

This article is geared toward Simphony system experts with a good working knowledge of the application's configuration and functionality.

Contents

- 1 Benefits of Distributing Client Applications from the Local Property Server
- 2 EMC Configuration
  - 2.1 Configuring the Workstation module
    - 2.1.1 Changing the CAL server location
    - 2.1.2 Moving the DCAL server to another service host
  - 2.2 Configuring the DCAL Download Schedule
  - 2.3 DCAL file download status
- 3 Setting up a new workstation with a DCAL server
- 4 See Also

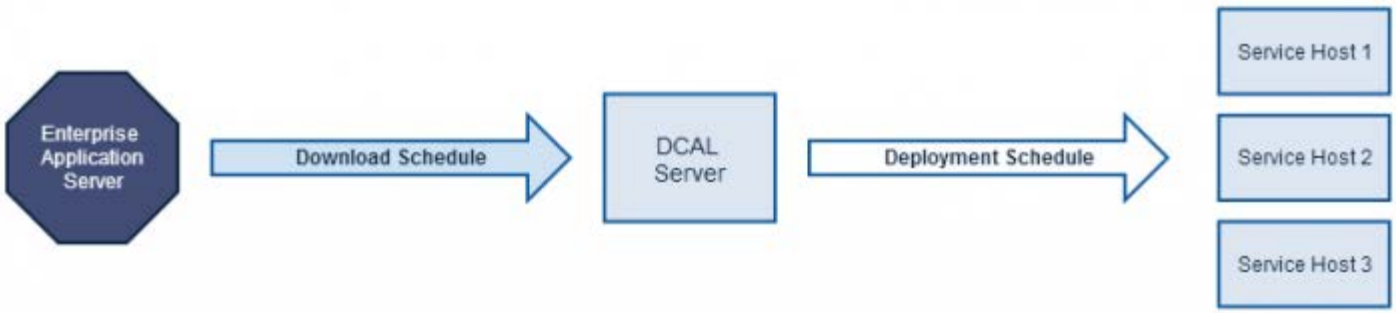
Benefits of Distributing Client Applications from the Local Property Server

When new client applications or support files are available, the Client Application Loader (CAL) sends a new set of files from an enterprise application server to the clients. The standard Simphony v2 ServiceHost CAL package is about 50 megabytes (MB). A property with 100 clients will have to download 5000 megabytes through the wide area network (http://en.wikipedia.org/wiki/Wide_area_network) (WAN). When the bandwidth of a property cannot support the simultaneous requests made by clients, properties may experience bandwidth bottlenecks. To alleviate bandwidth problems, distributed CAL (DCAL) feature lets you configure one or more service hosts above a property or within a property as a DCAL server. To distribute client applications (CAL packages), the DCAL server uses the local area network (http://en.wikipedia.org/wiki/Local_area_network) (LAN) which has a higher bandwidth and a higher data transfer rate than the WAN. Updated files and new packages get downloaded to the DCAL server, and then workstations retrieve the updated files from the DCAL server over the LAN.

With the DCAL feature, you can also distribute packages to workstations when the property loses connectivity to the enterprise application server. Once CAL packages are deployed to the DCAL server, clients can use the DCAL server to get the new CAL Packages without having to rely on the connectivity to the enterprise application server.

Without DCAL

With DCAL



EMC Configuration

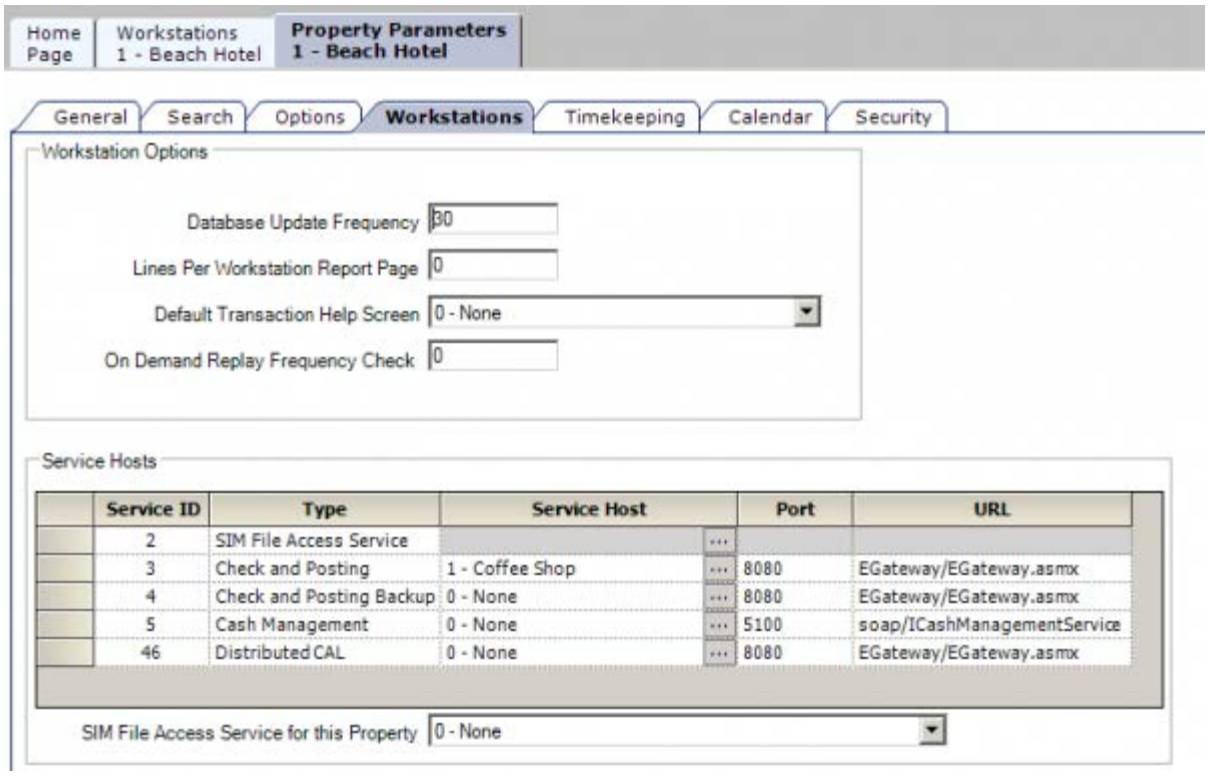
You need to configure both the Workstations module and the DCAL Download Schedules module to setup the DCAL server.

Configuring the Workstation module

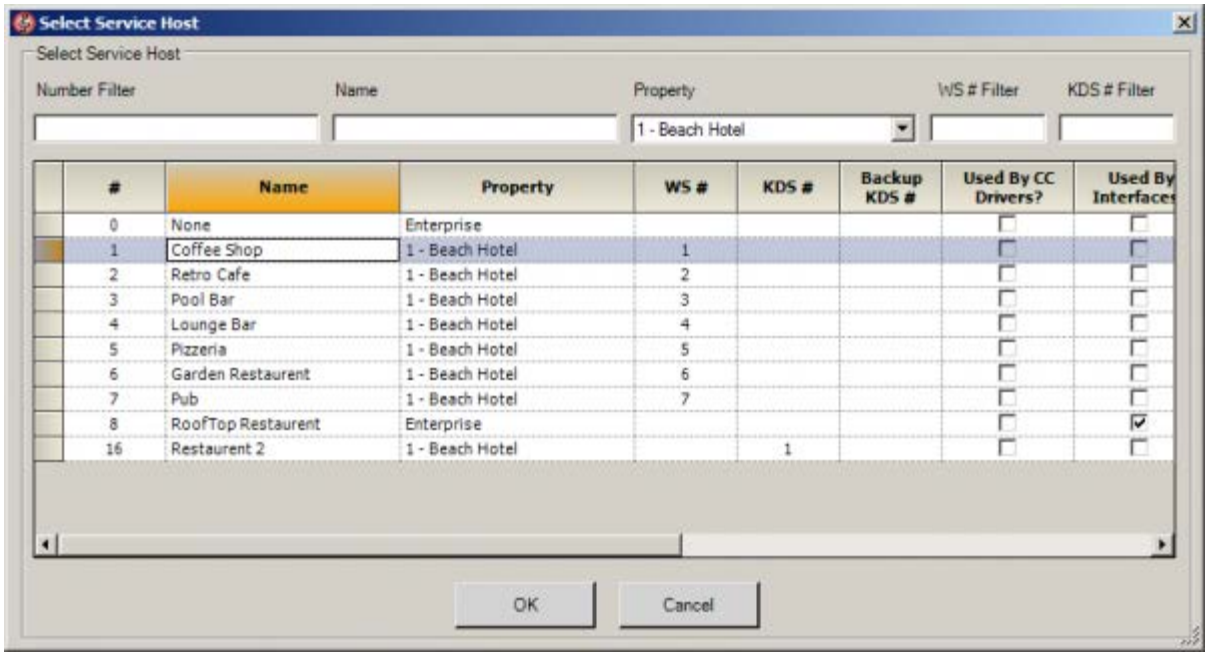
To setup the DCAL feature, you have to designate a service host to act as a DCAL server. You can designate a service host to act as a DCAL server within or above a property depending on the number of workstations and the geographical distribution of properties.

To define a service host as a DCAL server:

1. Navigate to *EMC* > *Property* > *Property Parameters* > ***Workstations*** tab.

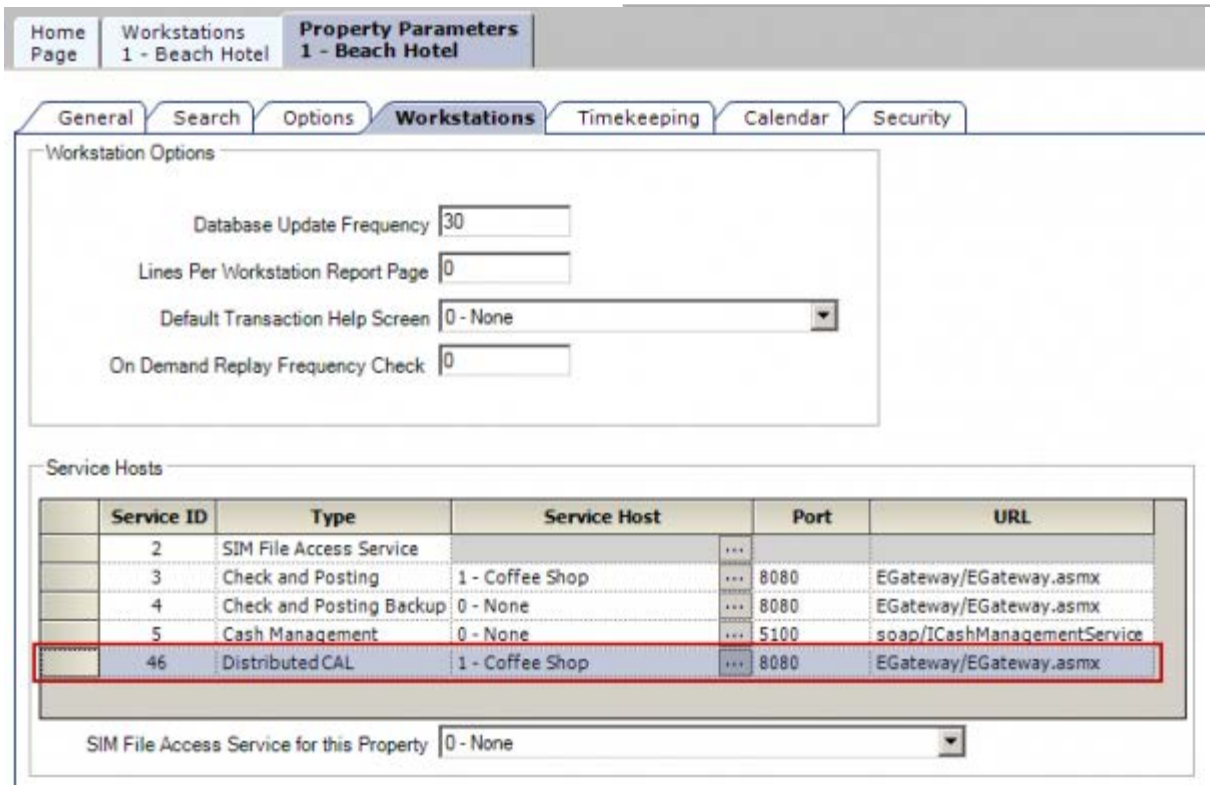


2. Select a service host for the Distributed CAL service host type by clicking the ... icon.



3. From the **Select Service Host** window, select the service host to act as the DCAL server and click **OK**.

Due to limited storage, when configured on a Windows CE device, the DCAL server only stores CAL Packages for Windows CE clients. If a property has a combination of Windows 32 and Windows CE service hosts on a property, you should set up a Windows 32 service host as a DCAL server.



4. Click **Save**.

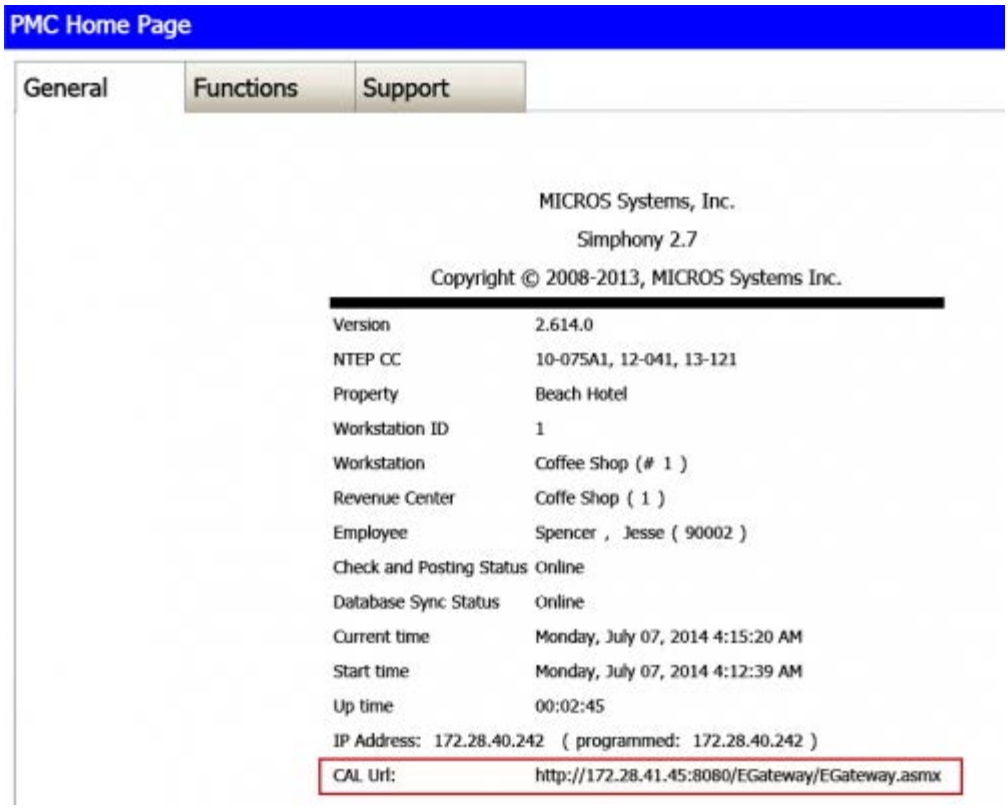
Changing the CAL server location

Once a property is configured to retrieve CAL packages from the DCAL server, workstations in the property that were pointed to the enterprise application server automatically changes the CAL URL to point to the DCAL server. You must reboot the service host for the changes in the CAL server to apply.

Moving the DCAL server to another service host

If a DCAL server was moved from one service host to another, all service hosts under the property updates the CAL URL to point the newly defined DCAL server. You must reboot the service host for the changes in the DCAL server to apply.

You can see the changes made to the CAL server URL from the workstation. After signing in, select *PMC > PMC Home Page > **General** tab.*

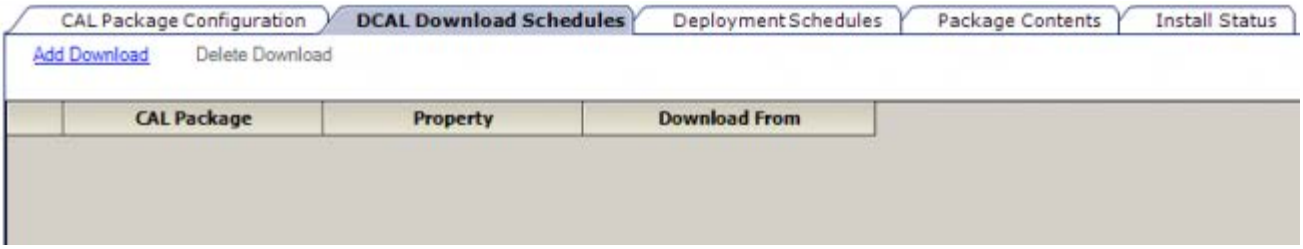


Configuring the DCAL Download Schedule

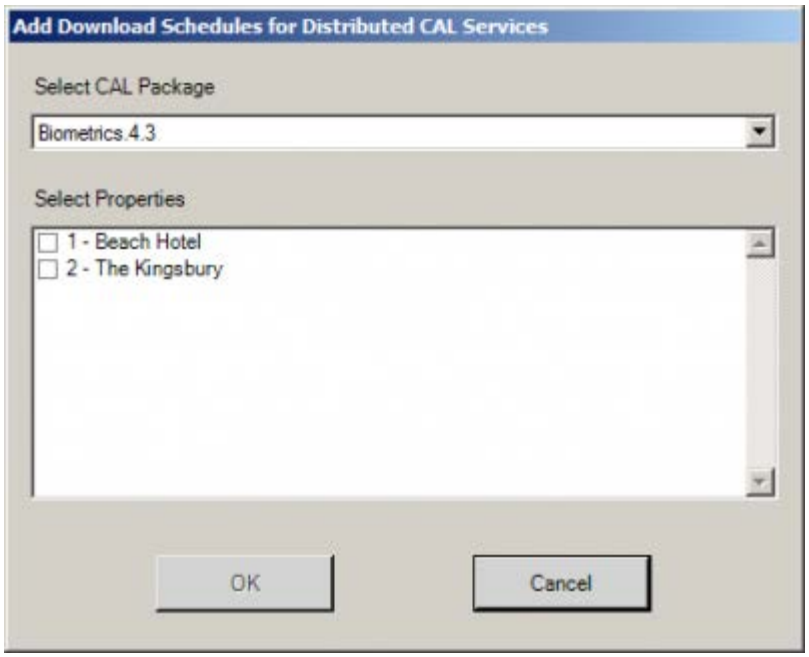
DCAL Download Schedules prevent unexpected network utilization by controlling when the software packages are delivered to the DCAL server from the enterprise application server.

To add a DCAL Download Schedule:

1. Navigate to *EMC > Setup tab >* ***CAL Packages (New!)***.
2. Select the **DCAL Download Schedules** tab.



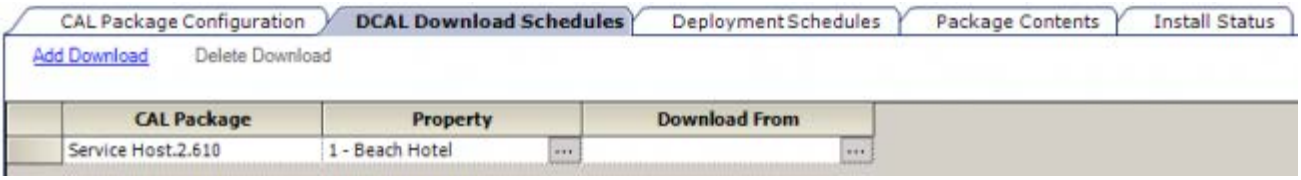
3. Click the **Add Download** link.



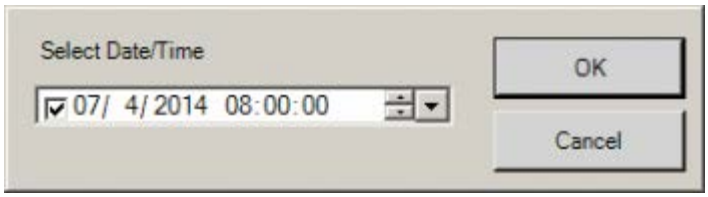
4. On the **Add Download Schedules for Distributed CAL Services** window, select the required CAL Package from the **Select CAL Package** drop-down menu.

5. Select the desired properties.

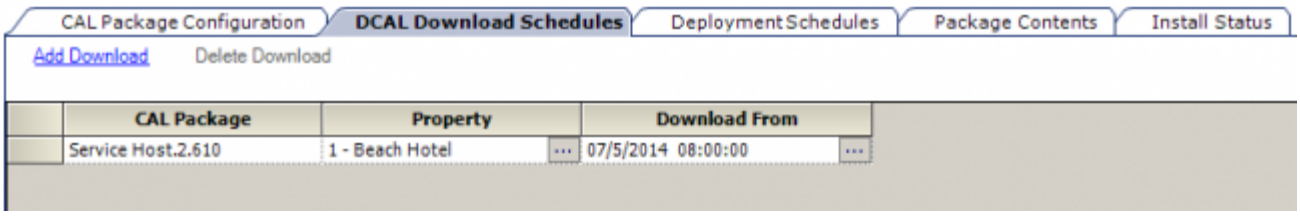
6. Click **OK**.



7. Define a time to download the CAL Package by clicking the ... icon under the **Download From** field. If the **Download From** field is left empty, CAL Packages get downloaded immediately.



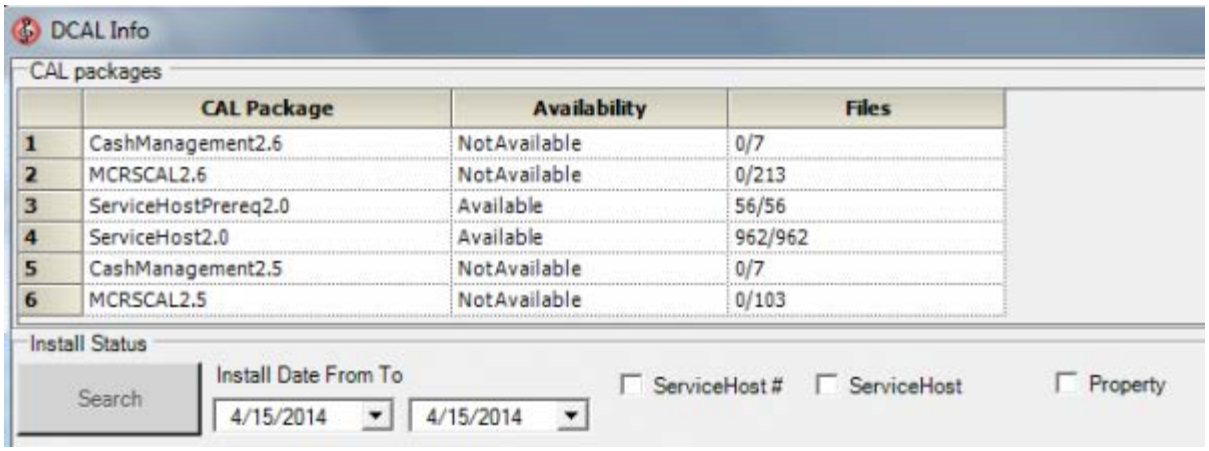
8. Click **OK**. The Download schedule appears on the screen. Repeat these steps to add more schedules.



Important: You still need to configure Deployment Schedules from *EMC* > *Setup tab* > ***CAL Packages (New!)*** in order to deploy CAL packages to the service hosts. Without Deployment Schedules, CAL Packages are stored on the DCAL server and are not deployed to the service hosts. The New CAL 2.x article has more information.

DCAL file download status

The **DCAL Info** module located in *EMC > Enterprise level > Tasks tab > ServiceHost Status/Control > **Host Name*** shows the availability and the file download status of the CAL Packages for a selected Workstation.



Setting up a new workstation with a DCAL server

When setting up a new workstation, the workstation CAL client prompts you with a list of application servers from which to select. If you have configured a DCAL server, select the DCAL server from the list. This takes you to the workstation selection screen. Since the DCAL server is configured to serve a property, the CAL client does not provide a list of properties after you have selected the DCAL server as the CAL server.

See Also

- New CAL 2.x
- CAL Package
- Simphony 2.7

Distribution options in Simphony 2.x

This article relates to programming of an EMC module.

The following options appear in most modules. Some modules, such as Menu Item Maintenance, contain module-specific distribute dialog boxes.

Option	Description
Create Clone	Select this option to copy IP addresses of workstations and KDS displays and to distribute all revenue centers (RVCs) and create new RVCs.
Distribute RVCs	Select this option to distribute RVCs in addition to distributing the selected modules for the property. This option is intended for a user who wants to clone a property. The cloning process copies all modules for the RVC, creates new records, and overwrites existing records.
Create RVCs	Select this option to create RVCs in the destination properties if they do not exist. This option is intended for a user who wants to clone a property, and it is often used for remote distribution.
Copy IP Addresses	Select this option to copy IP addresses of the source record to the destination record. This option applies only to modules where the records include an IP address (for example, workstations and KDS displays).
Overwrite records if they exist	Select this option to overwrite existing records in the destination location. If the destination record is inherited, it is not overwritten.
Create records if they do not exist	Select this option to create new records in the destination location.
Distribute inherited records	

	Select this option to distribute all selected records (defined and inherited) from the source property to the destination property. Deselect this option if you want to distribute only records defined at the source property to the destination property.
If destination record is inherited, create override	Select this option to distribute all selected records (defined and inherited) from the source property to the destination property. Select this option to create an override record in the destination property if there is an inherited definition present. Deselect this option if you do not want to distribute the record from the source property. The destination uses the inherited record.
Distribute Data Extensions if they exist	Select this option to distribute data extension values, if they exist. Make sure that the source and destination data extension property records match or distribution will fail. Deselect this option if you do not want to distribute data extension values.

Distribution based on source, destination, and selected options

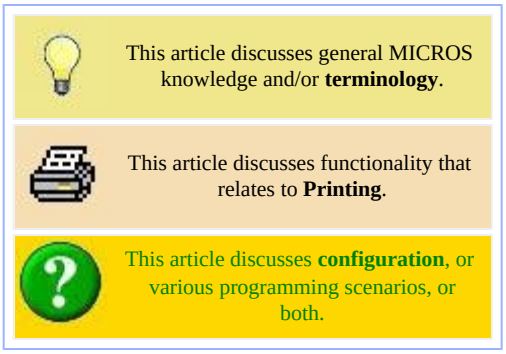
Record Source Type	Record Destination Type	Option bit: Distribute inherited records	Option bit: If destination record is inherited, create override	Destination Record Created?
Inherited	Inherited	Selected	Selected	Yes
Inherited	Inherited	Selected	Deselected	No
Inherited	Inherited	Deselected	Selected	No
Inherited	Inherited	Deselected	Deselected	No
Inherited	Defined	Selected	Not Applicable	Yes
Inherited	Defined	Deselected	Not Applicable	No
Defined	Inherited	Selected	Selected	Yes
Defined	Inherited	Selected	Deselected	No
Defined	Inherited	Deselected	Selected	Yes
Defined	Inherited	Deselected	Deselected	No

Defined	Defined	Selected	Not Applicable	Yes
Defined	Defined	Deselected	Not Applicable	Yes

Dopplebon Printing

Dopplebon Printing is a printing method that allows one chit to print for each individual menu item on the order. This method of printing is generally used by kitchens where there is a single printer, and where a kitchen runner distributes the order chits to the various preparation stations.

In general, order devices are *not* configured as Dopplebon printers. In a typical environment, two similar items (for instance, the entrees Chicken Alfredo and a Penne with Shrimp) that are ordered in the same round are printed on the same chit. However, with Dopplebon Printing, those same two items will print on individual chits.



The Dopplebon configuration is typically used in locations outside the United States, and it is generally used in Fine Dining locations that use a kitchen runner.

Contents

- 1 EMC Configuration
- 2 See also

EMC Configuration

Dopplebon Printing is configured on a per-printer basis; this feature is enabled when the Order Device option bit, **[3 - Print Dopplebon]** is on. Optionally, **[4 - Print Dopplebon Summary]** can be enabled; when this option is turned on, a summary of all the menu items will print on a summary chit that prints before all the individual item chits.

See also

Order Devices	Order Device · Order Device Redirection · Order Device (PMC Procedure) · Autofire · **Dopplebon Printing** · Hold and Fire · How Menu Items Print · Kitchen Themes · Local Order Receipt · Order Device Routing by Order Type Setup · Production Items for KDS · Routing Group · Secondary Printing
Learning series: Order Devices	

EMC

*The **EMC**, or **Enterprise Management Console**, is the primary configuration application in Simphony. In addition to configuration, the EMC offers functionality to batch credit cards, perform audit trail operations, run PC Autosequences, and perform other operations.*

This article relates to general EMC functionality or knowledge.

This article discusses a topic related to **installation and initial configuration** of the system.

Contents

- 1 Remote EMC Installation
  - 1.1 Hints for Remote EMC Installation
  - 1.2 AppLoader.exe
  - 1.3 Hints for utilizing the AppLoader
- 2 EMC Login
  - 2.1 Default Password
  - 2.2 Screen Resolution
  - 2.3 Home Page
- 3 Security
- 4 EMC Layout
  - 4.1 Navigational Icons
  - 4.2 Status Bar
  - 4.3 User Options
- 5 Accessing EMC Modules
- 6 Types of Modules
  - 6.1 Using Undo
  - 6.2 Audit This Record
- 7 See also

Remote EMC Installation

A shortcut for accessing the EMC will be installed on the application server during the installation. However, most EMC users do not access the application server directly; instead, the EMC is installed on other computers on the Network.

Note: The client (or remote) PC must be able to ping the Application Server (by Server name preferably) and to connect to the Gateway address.

- Simphony v2.x uses both the **8050** Gateway (for new installations) and the **8080** Gateway (when Simphony v1.x locations are upgraded to Simphony v2.x software) as well as to pick up the necessary Remote EMC installation files.

Once a network connection has been verified, to install a Remote EMC, follow these steps:

1. Open Internet Explorer and navigate to `http://AppServerName:8080/egateway/download/EMCClient/EMCSetup.exe` (where the '**AppServerName**' is the name of the Simphony application server.)
2. When asked if you want to 'Run' or 'Save' the file press "Run".
3. If you get a warning that the publisher is unknown, press "Run".
4. The installation process will begin. At the welcome screen press "Next".
5. When asked to choose the install destination, accept the default or change the value, and then press “Next”.
6. When prompted for the URL of the EMC Server replace “ServerName” with the Server Name of your application server or its IP address. Be sure to leave the ":8080" text. For example, type: `http://ServerName:8080`, and press "Next". 8080 is the Default Port number, but this is a configurable value, and if changed from the default for the gateway in the Web.config, that value should be used here as well.
7. Press "Install" at the "Ready to Install" prompt. Accept all prompts.
8. When it is done press "Finish."

Hints for Remote EMC Installation

If the Remote EMC installation fails, there is a good chance that the users '**Temp**' folder is full and needs to be emptied of its contents as much as possible.

- On Windows® XP computers, using Windows Explorer, the **Temp** folder is located along the following path: C:\Documents and Settings\[user]\Local Settings\Temp.
- On Windows® 7 computers, using Windows Explorer, the **Temp** folder is located along the following path: C:\Users\[user]\AppData\Local\Temp.

AppLoader.exe

After the installation, a shortcut to **AppLoader.exe** should appear on the desktop. (If the shortcut does not exist, the user can create a shortcut by pointing to the installation location. The default installation location is: `C:\Program Files\MICROS\EMCClient\AppLoader.exe`) When the AppLoader.exe is run, it will check the application server and verify that the EMC version on the local PC is the same as the version of the server. If it is, EMC begins right away. If it is not, AppLoader.exe will download new files to the client PC and then run EMC.exe. Once the AppLoader finishes (it may take a minute or so) the EMC logon screen will display. Always launch the EMC using AppLoader to insure that any files with new versions are pulled down to the client computer. A Remote EMC Client must have matching file versions in order to successfully connect. Note that most hotfixes do not have a different version, and will have to be moved manually, or the EMC will need to be reinstalled to get them.

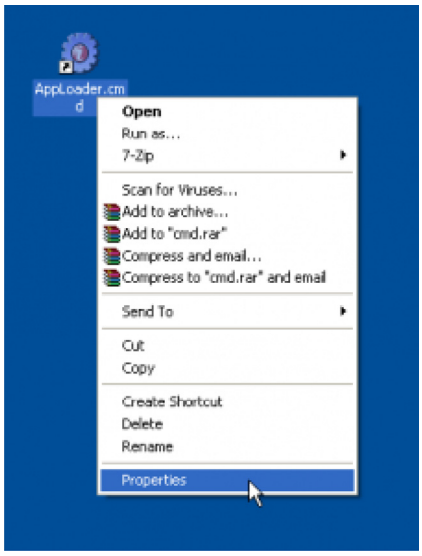
Note: For Simphony v1.x installations, this procedure works for Windows 7 (32-bit ***only*** prior to Simphony v1.5 MR 3) as well (note that the built-in Administrator account had been enabled prior to running the procedure, and the procedure was run as the built-in administrator, but that account can be disabled again once the install is completed and logon has been verified). A Remote EMC will not install on a 64-bit version of Windows 7 until after the Simphony v1.5 MR 3 release. The UAC controls may need to be adjusted to allow it to completely install on a Windows 7 computer.

Hints for utilizing the AppLoader

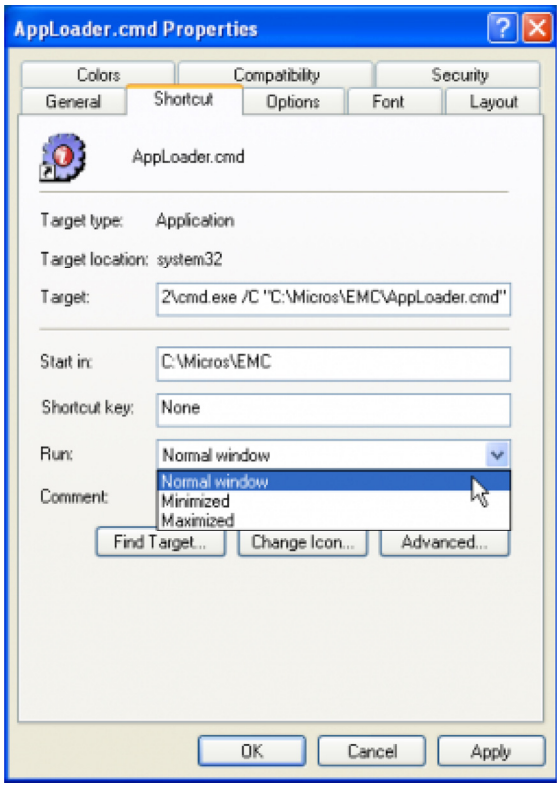
In order to keep the AppLoader command window from minimizing while running, perform the following steps:

- From the Remote EMC clients Desktop, access the '**AppLoader.cmd**' icon.

- Right-click on the icon and select 'Properties'.

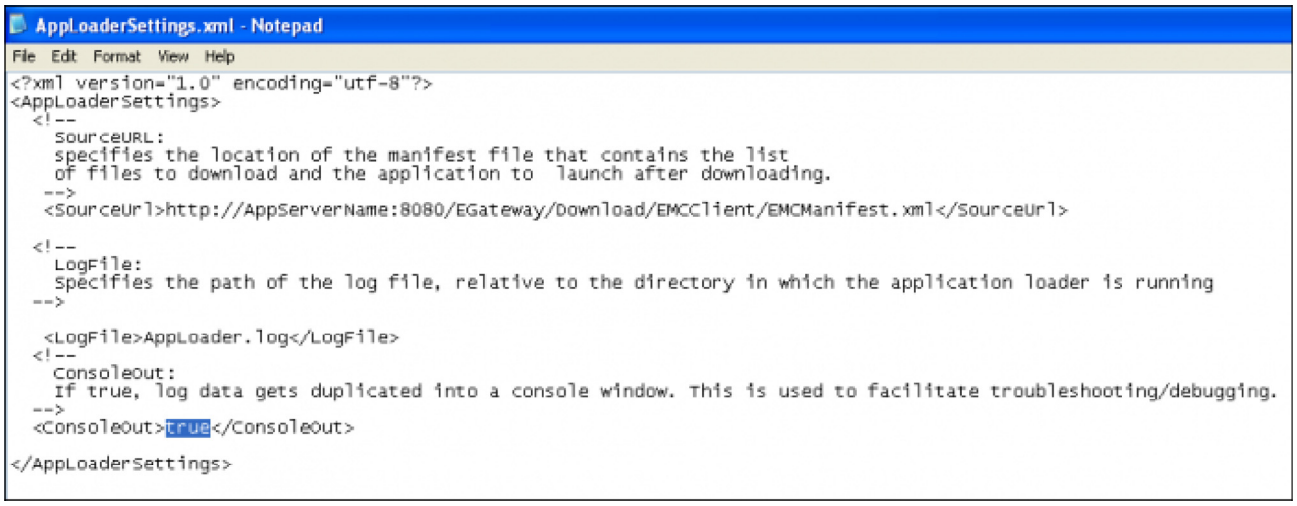


- From the 'Shortcut' tab, change the '**Run**' setting from '**Minimized**' to '**Normal window**' and click the '**Apply**' button.



To view the steps being performed while the AppLoader is running, access the '**AppLoaderSettings.xml**' file located along the following path: C:\Micros\EMC

- Change the **ConsoleOut** setting to '**true**' and **Save** the change.



EMC Login

To login to the EMC:

- After starting the EMC application, the EMC splash screen runs while the program is loading.
- When the server selector appears, select the Server from the drop-down or type in a new server name if the desired server is not in the list.
- Enter the EMC username and password. Click **[Login]**.

The EMC server selector.

Default Password

There is no default password to EMC. If no user has a password, or if all users are locked out or forgot their passwords, an administrator must use the DbProcs utility to give a password to at least one user.

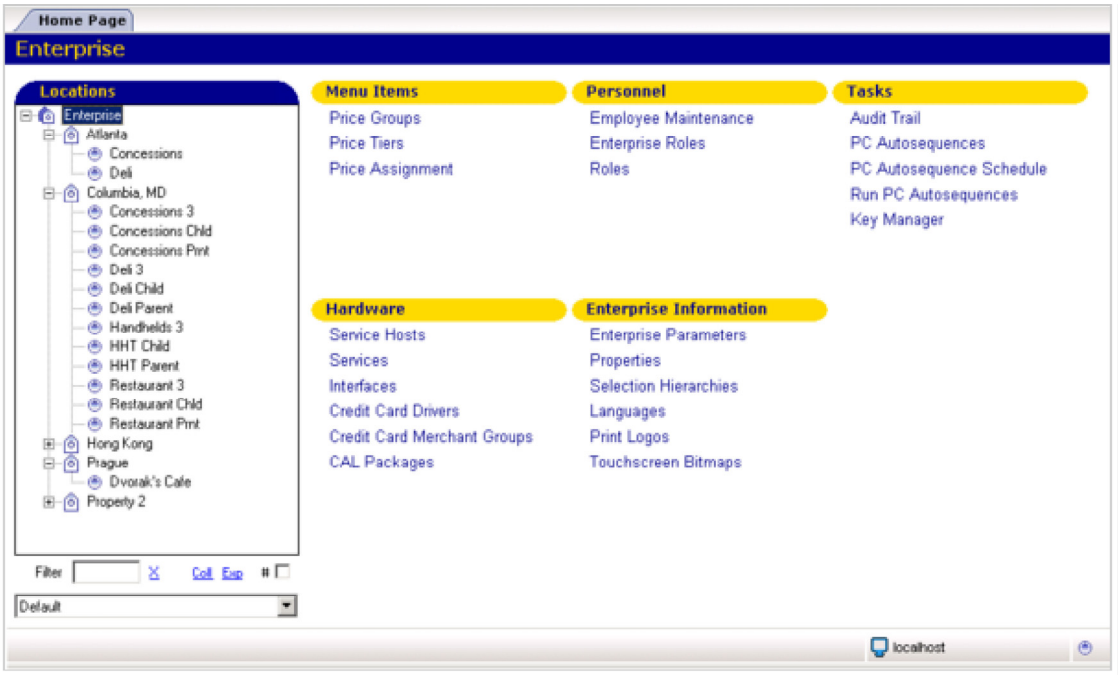
Screen Resolution

EMC forms have been designed to work on a minimum resolution of 1024x768. When using resolutions with fewer pixels (800x600), some forms may fail to display properly.

Home Page

After a successful login, EMC defaults to the Home Page. The Selection Hierarchy panel defaults

to the location that was in view when the EMC was closed: the same Selection Hierarchy will be selected in the drop-down list at the bottom, and the same node (Property, RVC, or Enterprise) will be selected in the tree view. (This information is user-specific; if multiple users access EMC on the same PC, each user's state is "remembered".)



The EMC Home Page. This view displays the Enterprise Scope, after a user has expanded some of the properties.

Security

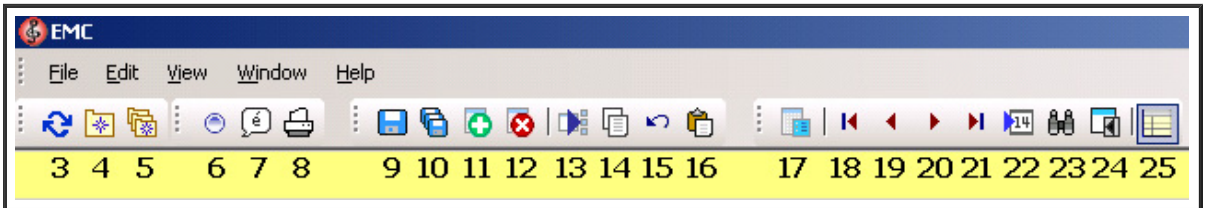
In most environments, an administrator has configured Enterprise Parameters so that EMC will automatically sign a user out after a specified period of inactivity. (For compliance purposes, this value is generally set to 15 minutes or less.) When this timeout occurs, all unsaved changes will be lost.

EMC Layout

Like other Windows software applications, EMC uses common controls that are familiar to most users. For example, the top of the screen includes a menu bar with standard "File", "Edit", and "View" options. In addition, a number of Navigational Icons are in the application's toolbar (the functions performed by these icons can also be accessed within the menu bar, but it is more common for users to use the icons). Below the working area of EMC, the Status Bar gives information about the current state of the system.

Navigational Icons

The following navigational icons are available from EMC's toolbar:



#	Icon	Function	Shortcut Key	TV/FV?
3	Refresh	This function performs a refresh of the data in the current module.	F5	Both
4	Close	This function closes the current module.	None	Both

5	Close All	This function closes all open modules.	None	Both
6	RVC Selector	This icon is enabled only when the current module is a RVC-Scope module. Select this icon to open the current module in another RVC. The selection list displays all RVCs in the same property as the current RVC.	None	Both
7	Translate	This icon is enabled only when the current GUI control is a translatable text field. Select this icon to open the EMC Record Translation dialog. Generally speaking, text translation is available in two fields: Table View's Name field and in the "Current Record" Name field in Form View.	F8	Both
8	Print	This function opens a dialog that allows the user to print a record or records from Table View.	Ctrl + P	Table View
9	Save	This function saves changes to records in the current module. This icon is enabled only when changes have been made to the current module. For those modules that allow for the insertion of a record, any newly added record will be written to the database and automatically saved. The "Save" icon will ***not*** be invoked (or enabled) until users make initial entries or modify an existing record entry. See the Types of Modules section for more information.	Ctrl + S	Both
10	Save All	This function saves changes to records in all open modules. This icon is enabled when any open modules have changed records.	None	Both
11	Insert/Add Record	This function allows the user to add records. Typically, the EMC Insert Dialog is displayed when this function is used, but some modules have specific insert dialogs. This icon is enabled only when the current module supports "Insert" functionality, and only when the logged-in user has Employee Role permissions to add new records to the current module.	Insert key	Both
12	Delete	This function allows the user to delete records. Typically, the EMC Delete Dialog is displayed. This icon is enabled only when the current module supports "Delete" functionality, and only when the logged-in user has Employee Role permissions to delete records from the current module	Delete Key	Both
13	Distribute	This function lets the user Distribute records. This icon is enabled only when the current EMC user is associated with an Enterprise Role with the option, **[Distribute]** enabled, and only when the current module supports Distribution.	None	Both
14	Copy	This function lets a user copy a record or records while in Table View.	Ctrl + C	Table View
15	Undo	This function performs the Undo/Reload function. See Undo, below.	None	Both
16	Paste	This function lets a user paste a record or records while in Table View.	Ctrl + V	Table View
17			None	Both

	Table/Form View Toggle	This function toggles the current module between Table View and Form View.		
18	First Record	While in Form View, this function allows the user to navigate to the first visible record from Table View.	None	Form View
19	Previous Record	While in Form View, this function allows the user to navigate to the previous visible record from Table View.	Alt + Left Arrow	Form View
20	Next Record	While in Form View, this function allows the user to navigate to the next visible record from Table View.	Alt + Right Arrow	Form View
21	Last Record	While in Form View, this function allows the user to navigate to the last visible record from Table View.	None	Form View
22	Goto	This function opens a dialog that allows a user to type an object number, allowing the user quickly navigate to the specified record.	Ctrl + G	Both
23	Find	This function, available only in Table View, opens a dialog that allows a user to find a record based on text comparison in any column. For instance, a user may choose to find a Tender/Media record that has "Cash" in the name.	Ctrl + F	Table View
24	Previous Module	In some modules, "goto links" are provided to quickly open other modules. (For example, the Job Codes Form View tab includes a navigation link to open the Employee Class module.) After clicking a goto link, this icon is enabled; when clicked, it will close the module that was "gone to" and return the EMC user to the module from which the link was pressed.	None	NA
25	Navigation Bar Toggle	This function, available only in Form View, toggles the visibility of the yellow record navigation bar. For an image of the navigation bar, see Form View and Table View: Form View.	None	Form View

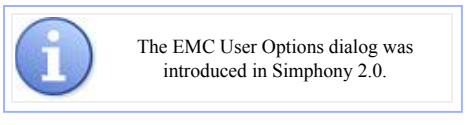
Status Bar

Main article: EMC Status Bar

At the bottom of EMC, the Status Bar gives information about records being added/deleted, the logged-in user, and the license status of the system. For more information, see EMC Status Bar.

User Options

Main article: EMC User Options



From the "Edit" menu of EMC, a user can choose "Options". These options allow EMC to be customized per user. For more information, see EMC User Options.

Accessing EMC Modules

The EMC modules are located on EMC's Home Page according to scope: Enterprise, Property, or Revenue Center. (For more information, see EMC Programming Hierarchies.) An employee's Roles ultimately determine if a user is able to access a module or not. If a module is "grayed out" (disabled), the user does not "View" permissions for the module.

Types of Modules

In general, there are three types of modules in the EMC:

Single-Record modules
: A Single-Record Module does not have multiple records. Examples of Single-Record Modules include RVC Parameters, Property Parameters, Playback Control, and SLU Assignment. In these modules, there are multiple fields to change, but all the changes are for a single "record". Users ***cannot*** insert additional records into Single-Record modules.

Table View/Form View modules
: Most modules in the EMC are Table View/Form View modules. Examples include Discounts, Tender/Media, KDS Controller, and Touchscreens. The initial display of these modules is Table View, which shows a list of all the records. In Form View, a user sees all the fields for a single record. Table View records allow numerous user-friendly GUI tools, such as Undo, Copy/Paste, and F3/F4. For more information, see Table View.

Maintenance modules
: The Employee Maintenance and Menu Item Maintenance modules are similar to Table View/Form View modules, however there are some functional differences:

  - When these modules open, the record list is not displayed. Because these modules generally have a large number of records, users are able to enter search criteria to retrieve the exact records required.
  - Multiple Table Views are available to display the multiple types of data that is accessed in these modules. The tabs below the table allow a user to toggle between record types.

Using Undo

Note: It is ***not*** possible to undo an "Add" or "Delete" of records.

EMC uses a record-level Undo, where all changes to a single record are "undone". In general, there is not a way to undo a user's previous change because the flow and layout of EMC make this an impractical option. For example, a user could make a change in module A, then open modules B and C, and then press undo. The result would be confusing for the end-user. (Note that the standard Ctrl+Z functionality does exist to undo changes to a text field; if a user enters a name field and types incorrect information, Ctrl+Z will revert the text field to its original state.)

There is not an undo option for Single-Record modules; instead, a user should use the refresh button. In Table View/Form View modules, a user may access Undo via the right-click menu in table view or by using the Undo icon in Form View. In Employee Maintenance and Menu Item Maintenance, Undo is available via the Right-Click Menu only.

Audit This Record

Main article: Audit Trail: Audit This Record

In almost every module, a user can select "Audit This Record" from the Edit menu. This functionality lets a user see all changes for records in the module. In addition, "Audit This Record" from the Edit Menu is disabled in the Maintenance modules; it is only available via the Right-Click Menu.

See also

- EMC Requirements
- EMC functionality
- EMC modules
- Enterprise

- Property
- Revenue Center
- Selection Hierarchies
- EMC Programming Hierarchies
- Simphony 1.5 Maintenance Release 3

EMC Requirements

This article discusses a topic related to **hardware**.

This article discusses a **technical topic** that is not intended for all readers.

This article discusses functionality that relates to **Simphony v2.x**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Introduction
- 2 EMC: Basic System Requirements
- 3 Bandwidth Guidelines
- 4 .NET Framework
- 5 Latency
- 6 Privileges
- 7 See also

Introduction

EMC (the Simphony Enterprise Management Console) is the main point of configuration for the Simphony enterprise. It can be installed on both the Application Server or on a customer PC. For the purpose of this article, any reference to EMC assumes the user has it installed on a remote PC meaning that the user has an instance of EMC installed on a PC that is NOT the Application server. This means that all communication with the databases on the Application and Reporting Servers is via the internet, or remote.

EMC: Basic System Requirements

EMC has network and hardware requirements that need to be taken into consideration when setting up the Client-side (also referred to as Customer) PC.

EMC Install General Guidelines

Computer & Processor	1 GHz or faster x86 or 64-bit processor	
Memory (RAM allocated for EMC. This does not include Windows)	2-3GB (32-bit system)	3-4GB (64-bit system)
Hard Disk Space	Greater than or equal to 3GB	
Operating System		

	Windows 7 (32-bit or 64-bit) **Windows Server 2008 R2** (64-bit)	

RAM usage when adding 1000 definitions via Remote EMC (*RAM usage is for all programs running on the PC, including remote EMC*).

Network activity when doing a Menu Item search for 1000 items via remote EMC

As is illustrated by the images above, very little strain is put on the network, even when adding one thousand menu item definitions simultaneously. But please note that the PC, which has 8 GB of RAM, is using about half of its allotted memory (this usage includes all currently running Windows programs). As a general guideline, in addition to the numbers above, more RAM is better especially when there will be a need to run multiple large programs at once.

Bandwidth Guidelines

The total bandwidth required will vary based on the tasks performed at any given time as well as the size of the databases in use and number of Properties. As a baseline, simply navigating through EMC can be done on a connection as slow as DSL (128 Kbps-3000 Kbps). When larger tasks come into play, such as Distribution, the number of items that are being distributed as well as the number of Properties receiving the items will be highly impacted by the network capabilities. As a general rule, the more bandwidth available the better EMC will perform its tasks.

.NET Framework

.NET Framework is a versioned product from Microsoft that allows different programming languages to speak to each other (think a modern-day Rosetta stone) and is a mandatory piece of background software for Simphony to run. Normally .NET is installed automatically on Windows. The minimum version of .NET for MICROS Simphony is v3.5.

Latency

Latency is the time between the user triggering an action and that action's results being returned to the user.

An example: When the user wants to do an EMC search for a menu item, say, a Roast Beef Sandwich. The user enters the Menu Item Maintenance module in EMC, types in the item name in the search box and clicks "Search". The time between when the user clicks "Search" and when the screen displays the Roast Beef Sandwich Menu Item is considered latency.

Latency can affect the user experience and is dependent on many factors. One common example of such a factor is that if the user is on WiFi vs. a wired Ethernet connection the latency *could* be higher. Reasons for this include that the data transmission is slower because of the wireless signal or because it needs to go through an extra data connection point in order to get where it is going. These are not guaranteed factors but it is important that the user be aware of potential environmental variables.

Privileges

In order to install EMC, the user will need to be a part of a Windows User Group that has install and upgrade ("administrator (http://www.webopedia.com/TERM/A/administrative_privileges.html) ") privileges.

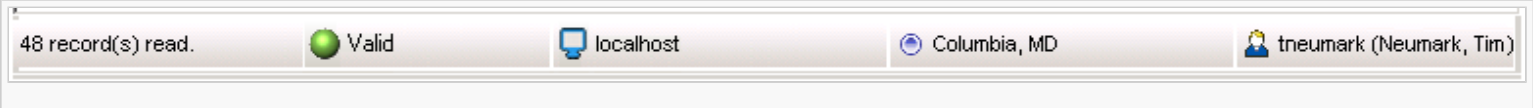
See this article (http://technet.microsoft.com/en-us/library/cc772524.aspx) for information about setting up groups in Windows.

See also

- EMC
- EMC functionality
- EMC modules
- Enterprise
- Property
- Revenue Center
- Selection Hierarchies
- EMC Programming Hierarchies
- Simphony 1.5 Maintenance Release 3

EMC Status Bar

This article relates to general EMC functionality or knowledge.



The EMC status bar shows the following information and status messages.

Section	Description
Messages	This section indicates the current or previous task. The example 48 record(s) read is a common message that appears after you open an EMC module. Other common messages are: ▪ Reading data... - Appears while you open a module. ▪ Deleting record *object number* - Appears while you delete a record. (10 is replaced with the object number of the record that is being deleted.) ▪ Adding record *object number* - Appears while you add a record. (10 is replaced with the object number of the record that is being added.) ▪ *number of record(s)* deleted - Appears after you delete records. (2 is replaced with the number of records that were deleted.) ▪ *number of record(s)* added - Appears after you add records. (2 is replaced with the number of records that were added.)
Licensing status	This section shows the system license status. Simphony versions 2.7 MR3 and later do not show a license status.
Server name	This section shows the name of the application server (for example, localhost) to which the EMC is connected. This field does not change for the duration of an EMC session.
Module location	This section shows the EMC scope of the module that is currently open (for example, Columbia, MD, which corresponds to the Columbia, MD property). This field can show: ▪ Enterprise: When an enterprise level module is open. ▪ *property name - revenue center*: Shows the property name and the current RVC (for example, Columbia, MD - Concessions 3) appears when a revenue center level module is open.
User	This section shows the user name and employee name for the logged in user using the following format: User Name (Last Name, First Name).

See also

- EMC
- EMC functionality category

Employee Class

An **Employee Class**, sometimes called an **Operator Class**, is a collection of options and settings for a group of employees. Unlike Employee Roles, which dictate permissions-related behavior (ability to perform a void, for instance), Employee Classes generally control transaction-related behavior such as the Default Transaction Touchscreen or the requirement to use Table Numbers. To perform workstation operations, every employee must belong to an Employee Class.

A **corresponding article** for this topic exists in the Data Access namespace.

This article relates to programming of an EMC module.

Operator options were moved to Employee Classes in Simphony 1.0 Service Pack 10.

This article discusses functionality that relates to **Personnel**.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses general functionality relating to SIM.

Contents

- 1 EMC Configuration
  - 1.1 General Tab
  - 1.2 Operator Options Tab
    - 1.2.1 Permissions
    - 1.2.2 Comparison

EMC Configuration

The **Employee Class** module is opened from the Property Scope of EMC. There are two tabs in this module, the General Tab and the Operator Options tab.

General Tab

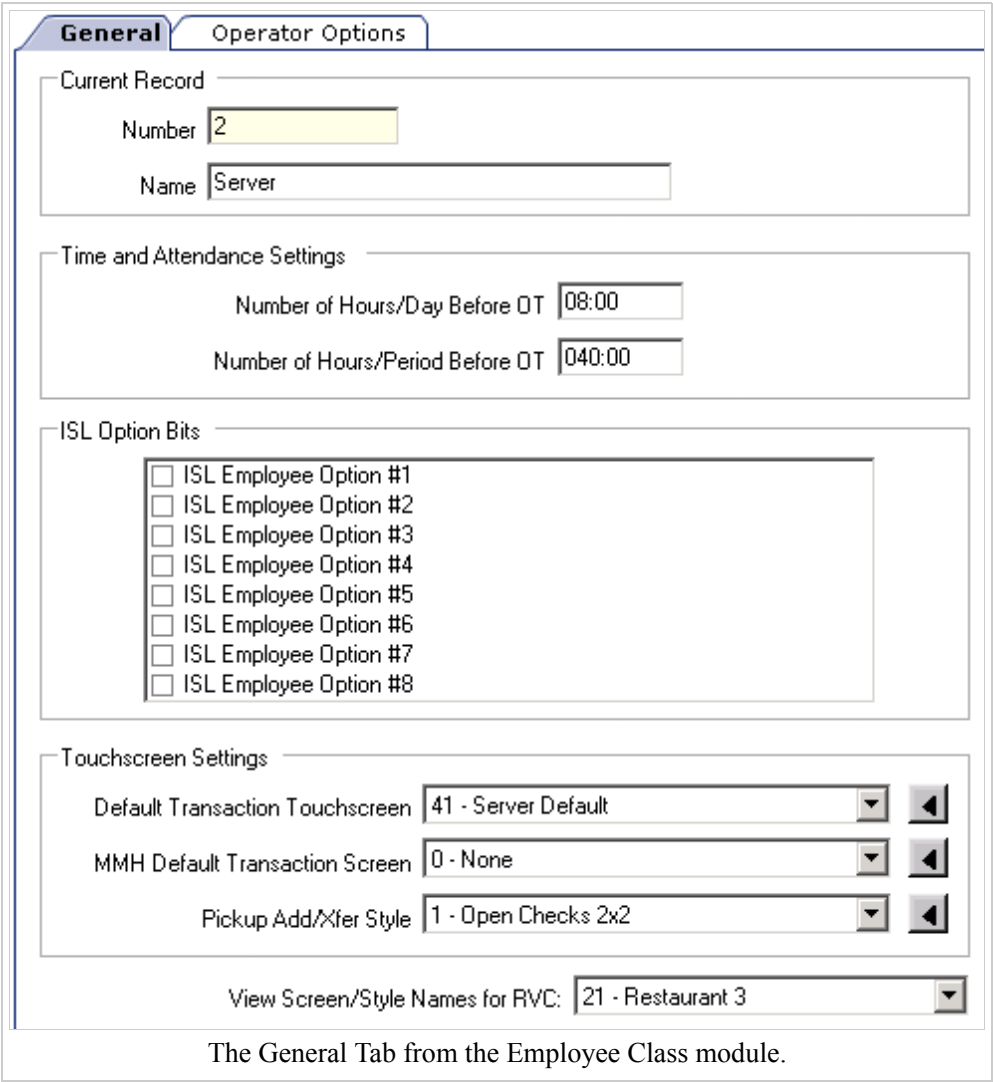
On the General Tab, the following fields and options can be configured:

Name
: Enter a name for this Employee Class. Up to sixteen characters are allowed.

Number of Hours/Day Before OT
: Enter the number of regular hours that employees in this class can work in a single day before being paid at the overtime rate.

Number of Hours/Period Before OT
: Enter the number of regular hours that employees in this class can work in a single pay period before being paid at the overtime rate.

ISL Option Bits
: Select these options to allow employees in this Employee Class to execute ISL scripts with the selected employee Option (1-8) enabled. These options act like a transaction privilege level in an ISL script. ISL Scripts can be written to include variables that check for the presence of these privileges for the employee who is running the script. If the employee is not a member of an employee class that has the necessary ISL Employee Option enabled, the script will not execute, and a privilege prompt displays. For more information, please see the SIM.



The General Tab from the Employee Class module.

Default Transaction Touchscreen

Select the default touchscreen that appears when members of this Employee Class sign in to a workstation. This field is overridden by the Operator Default Touchscreen and the Default Training Mode Touchscreen. Note that Employee Class is a Property-Level module, and that the Touchscreens are RVC-Level; to view a specific RVC's touchscreens in the drop-down list, change the "View Screen/Style Names for RVC" drop-down. Note that when using Employee Class to dictate the Default Touchscreen, each RVC should use the same touchscreen number, so employees do not encounter errors from one RVC to the next.

MMH Default Transaction Screen

Select the default touchscreen that appears when members of this Employee Class sign in to a Mobile MICROS workstation. This field is overridden by the Operator Default Touchscreen and the Default Training Mode Touchscreen. Note that Employee Class is a Property-Level module, and that the Touchscreens are RVC-Level; to view a specific RVC's touchscreens in the drop-down list, change the "View Screen/Style Names for RVC" drop-down. Note that when using Employee Class to dictate the Default Touchscreen, each RVC should use the same touchscreen number, so employees do not encounter errors from one RVC to the next.

Pickup Add/Xfer Style

Select a Touchscreen Style to be used when Adding/Transferring checks via the **[Add/Transfer Check SLU]** function key (499). Note that Employee Class is a Property-Level module, and that the Touchscreen Styles are RVC-Level; to view a specific RVC's touchscreen styles in the drop-down list, change the "View Screen/Style Names for RVC" drop-down.

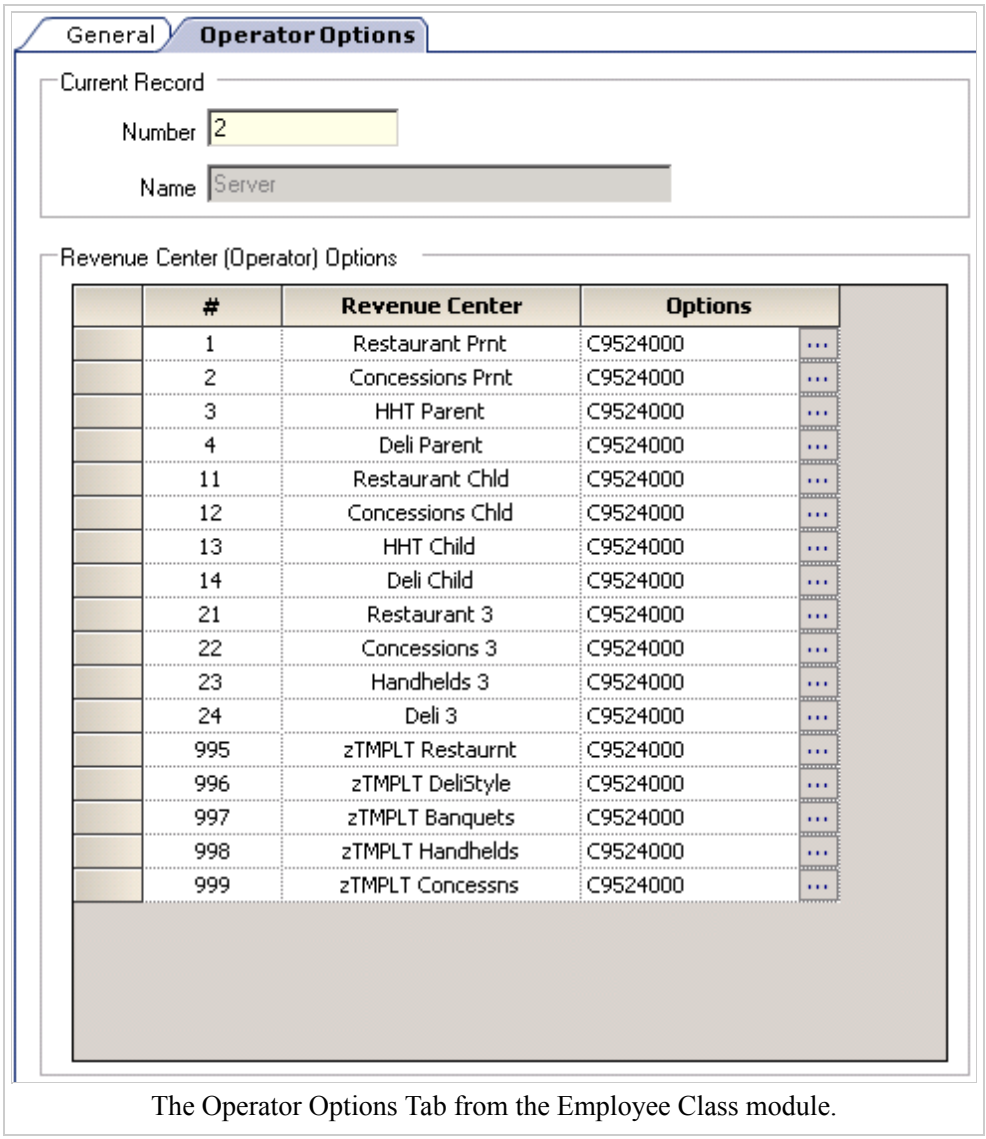
View Screen/Style Names for RVC

This field is informational only, and it defaults to 0-None. The purpose of this drop-down box is to show the names of the Touchscreens and Touchscreen Styles (in the Touchscreen drop-down boxes) defined in different Revenue Centers. Because Employee Class records are programmed on the Property Level, but Touchscreens and Styles are programmed per Revenue Center, this field can be used to see the names of

the Touchscreens and Styles in different Revenue Centers.

Operator Options Tab

See also, Operator Options



The Operator Options Tab from the Employee Class module.

On the Operator Options tab, every Revenue Center in the Property is displayed. From this view, only the Options column is configurable. This column includes the same option bits that are found per operator record.

The purpose of this tab is to allow easy configuration of option bits for related employees (employees in the same class). For example, the image shows a "server" class. Every employee in this class has the same option bit settings — servers are required to enter the number of guests with new checks, they are required to use table numbers, and they are Pop-Up operators.

To allow some flexibility in configuration, these operator settings are configured per RVC; while it is likely that employees in the "Server" class have the same options in "Deli Parent" vs. "Deli 3", this form provides the flexibility to give different operator options per RVC.

Finally, it is possible for an operator record to override the option bits configured here. If an operator's "Override Class Options" setting is enabled, the operator's option bit settings will be used instead of the options configured here.

Permissions

If the EMC programmer does not have the ability to view a Revenue Center, it will still appear in the list; rows containing these RVCs will be disabled and uneditable.

Comparison

The Option Bit Comparison Dialog can be used on this form.

Employee Group

Each employee in a Simphony system is associated with an **Employee Group**, programmed in EMC's Employee Maintenance module. This field is a layer of security; it controls how employees interact with other employees by preventing some employees from accessing other employee records. While useful, this field is quite restrictive; it is more typical that the Employee Level field is used.

This article discusses functionality that relates to **Personnel**.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses a topic related to **security**.

Contents

- 1 Configuration
- 2 EMC and PMC Behavior
- 3 Ops Behavior

Configuration

This setting allows a three-digit entry, where 0 allows employees to view all employee records, and any other value restricts the employee to viewing only employees who are also in the same group.

> ***Note:*** *The remainder of this article uses statements such as "can see other employees". This is not entirely accurate; the statement should read: "can see other employees with respect to the employee level." While the Employee Level and Employee Group fields can be used independently, it is possible to use them in conjunction, making this distinction necessary. However, for purposes of discussing the Employee Group topic on its own, the "employee level" text has been omitted.*

EMC and PMC Behavior

In EMC and PMC, an employee can view only employees in the same group, or the employee can view all other employees if the value is 0. To summarize:

- Employee's Group is 0. The employee can see all other employees.
- Employee's Group is 17. The employee can see only other employees in Group 17.

In Employee Maintenance, if the Employee Group of the logged-in user is not 0, employee records will display with the Employee Group field disabled. This prevents the logged-in user from changing a record to a group that the logged-in user cannot access.

Ops Behavior

During workstation operations, the Employee Group field controls which employees may perform authorizations (such as voids) for other employees. Consider the following chart; the manager can perform authorizations only when his employee group is "0" or if it is the same as the employee who needs the authorization:

Server's Employee Group	Manager' Employee Group	Ability to Authorize?
0	0	YES
0	91	NO
17	91	NO
91	0	YES
91	91	YES
91	17	NO

When an employee from "group 17" attempts to perform an authorization for an employee in "group 91", the workstation displays the error, **`Authorizing employee is not in the correct employee group`**.

Employee Level

Each employee in a Simphony system is associated with an **Employee Level**, programmed in EMC's Employee Maintenance module or via PMC. This field is a layer of security; it controls how employees interact with other employees by preventing some employees from accessing other employee records. Also, it gives EMC users access to some Employee Roles but not others.

This article contains a **best practices** section.

This article discusses functionality that relates to **Personnel**.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses a topic related to **security**.

Contents

- 1 Configuration
- 2 PMC and EMC Usage
  - 2.1 Setting is 0
  - 2.2 Setting is non-0: EMC
  - 2.3 Setting is non-0: PMC
- 3 Employee Levels and Roles
- 4 Best Practices

Configuration

This setting allows a one-digit entry, where 0 offers an employee the most access and 9 offers the employee the least access. This field controls access to other employee records in EMC and PMC, but the functionality is slightly different.

> ***Note:*** *The remainder of this article uses statements such as "can see other employees". This is not entirely accurate; the statement should read: "can see other employees within the same employee group." While the Employee Level and Employee Group fields can be used independently, it is possible to use them in conjunction, making this distinction necessary. However, for purposes of discussing the Employee Level topic on its own, the "employee group" text has been omitted.*

PMC and EMC Usage

Setting is 0

When the Employee Level field for an employee is set to 0, the functionality is the same for both EMC and PMC. Employees at this setting can view all other employees including themselves.

In EMC's Employee Maintenance, if the Employee Level of the logged-in user is not 0, the list of Employee Levels will be restricted to only levels that a user may access. For instance, if the logged-in employee's level is "2", the drop-down list will display 3-9.

Setting is non-0: EMC

When the Employee Level field for an employee is set to a value other than 0, the EMC prevents that employee

from seeing other employees at the same level or levels with "higher access". (By "higher access", this means *lower numerical value*.) For example:

- Employee A's Employee Level is set at 2
- Employee A logs into EMC and enters Employee Maintenance
- Employee A can see all employees at levels 3-9
- Employee A cannot see employees at levels 0-2, including himself.

Because the employee cannot see himself, there is no way to change his level or other privileges.

Setting is non-0: PMC

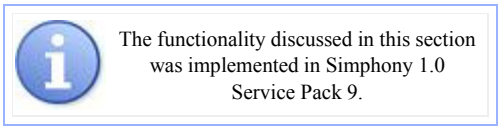
The PMC security settings are similar to the EMC security settings with one exception: the employee can access his own record. This has been made possible so that the employee can change his/her workstation ID or Mag Card. For example:

- Employee A's Employee Level is set at 2
- Employee A opens the PMC enters the employee procedure
- Employee A can see all employees at levels 3-9
- Employee A cannot see employees at levels 0-2. However, the employee can see himself, with access to only these fields:
  - First Name
  - Last Name
  - Check Name
  - Revenue Center
  - Assign ID
  - Assign Mag Card
  - Increment Shift

Because the employee cannot change his own level, there is no way for this employee to view additional employees.

Employee Levels and Roles

Each Employee Role and Enterprise Role is associated with a level. The Role Level field is designed to prevent an EMC user from modifying Employee Records to have greater permissions than the EMC user has. Consider the following example:



- An EMC user, Henley Nelson, has an Employee Level of "2". Henley can therefore see all employees in Levels 3-9.
- The database was programmed in a "proper manner" — the administrator configured the system so that Super Privilege Roles have a level of "0", but other less-powerful Roles (like "Bartender" or "Floor Manager") have a Role Level of 3.
- Henley is able to Edit and Add employee records.

In this situation, when Henley uses Employee Maintenance, the Employee's Roles Tab will prevent Henley from adding 0-Level Roles (and also 1-, and 2-Level Roles) to other Employee Records. Thus, Henley cannot create a user who is more powerful than himself.

In the rare instance that an employee was "misprogrammed" — a 0-Level EMC user assigns a 2-Level role to a 4-Level Employee — EMC will prevent other employees from modifying this Role. Following our example with Henley, he will be able to see the 4-Level employee, but the 2-Level Role assigned to the employee will be disabled, and Henley will not be able to modify it.

Best Practices

The following table demonstrates a well-programmed database. Notice that the Roles are configured with some "gaps" that allow flexibility for future types of users:

Level Number	Type of User / Role
0	System Administrators. Typically, only a handful of employees are System Administrators in any given Enterprise.
1	Enterprise Programmers. These users are often able to perform the same tasks as System Administrators, however some EMC modules are generally off-limits, such as Roles, Enterprise Roles, and Enterprise Parameters.
2	
3	
4	Property-Level Programmers. These users are often able to work in the modules that change frequently — Employee Maintenance, Menu Item Maintenance, and possibly Order Devices.
5	
6	Property Floor Managers. The term "floor manager" in this instance refers to an employee who does not have EMC access. Floor Managers provide operational assistance (voids, etc.) to workstation users. Typically, these users have PMC access to Order Devices and perhaps Menu Item Availability.
7	
8	The typical "Bartender", "Cashier", or "Server" user is in this Level. By placing these employees into Level 8, all EMC users and Floor Managers are able to see

	these records.
9	

Employee Role

An **Employee Role** is a group of privilege options defining what an employee can do. Employee Roles determine the EMC modules a user may access, and they also determine what types of transaction behavior an operator has (permission to do voids or open the cash drawer, for example).

A single Employee Role may be configured for all properties in the Simphony system, or a role may be active in only one or a few properties. In addition, multiple Employee Roles may be assigned to a single employee, making the configuration of roles a task-based procedure (a role may include permissions that only allow a user to "edit menu items", for example; see more in the best practices section). Also, job codes may be associated with employee roles, restricting clocked-in employees to a single set of permissions for the duration of a shift.

This article belongs to the MICROS **Important concepts** category.

This article contains a **best practices** section.

A **corresponding article** for this topic exists in the Data Access namespace.

This article relates to programming of an EMC module.

This article discusses functionality that relates to **Personnel**.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses a topic related to **security**.

Contents

- 1 EMC Configuration
  - 1.1 General Tab
  - 1.2 EMC Modules Tab
  - 1.3 Actions Tab
  - 1.4 Operations Tab
  - 1.5 Properties Tab
  - 1.6 View Tab
- 2 Determining Employee Access
  - 2.1 Job Code Overrides
- 3 Best Practices
  - 3.1 Operational Roles
  - 3.2 EMC Roles
- 4 Other Considerations

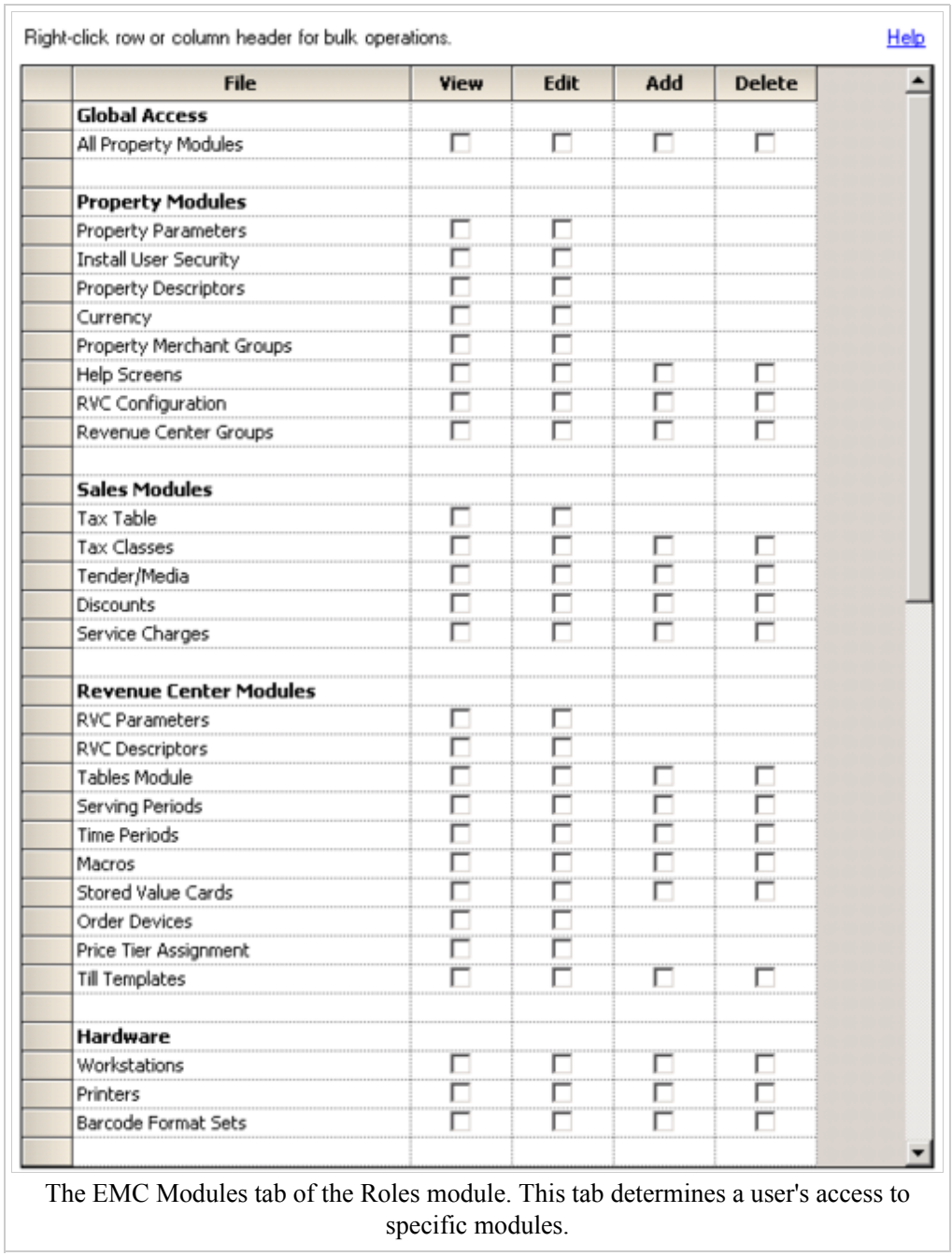
EMC Configuration

The **Roles** module is opened from the Enterprise Scope of EMC. (Do not confuse with the Enterprise Roles module, also located on the Enterprise Scope.)

General Tab

Only three configurable fields exist on the General Tab:

- Name - Enter the name of the Role. Up to 64 characters are allowed.
- Comment - Enter a comment describing this role. Up to 2000 characters are allowed; this field is not translatable.
- Level - This field is a level of security; it was created to prevent EMC users from creating Employee Records more powerful than themselves. See Employee Level: Employee Levels and Roles for more information.



The EMC Modules tab of the Roles module. This tab determines a user's access to specific modules.

EMC Modules Tab

From the EMC Modules tab, roles are configured to allow access to various modules of the EMC. From this tab, a user may be given permissions to:

- View a module (open it)
- Edit a module (to update fields or records within the module)
- Add records
- Delete records

Note: *A user must be given "View" access to a module to open it. If a user is programmed with ability to Edit, Add, and Delete a module, but not to view it, the user will not be able to open the module. When an employee does not have access to View a module, the module will display "grayed out" on the EMC Property or RVC Scope home page.*

In some modules, such as RVC Parameters or Order Devices, there is not an "Add" or "Delete" option because individual records cannot be added or deleted.

All Access

The All Access checkbox is available so that a role may be easily configured to View, Edit, Add, or Delete every

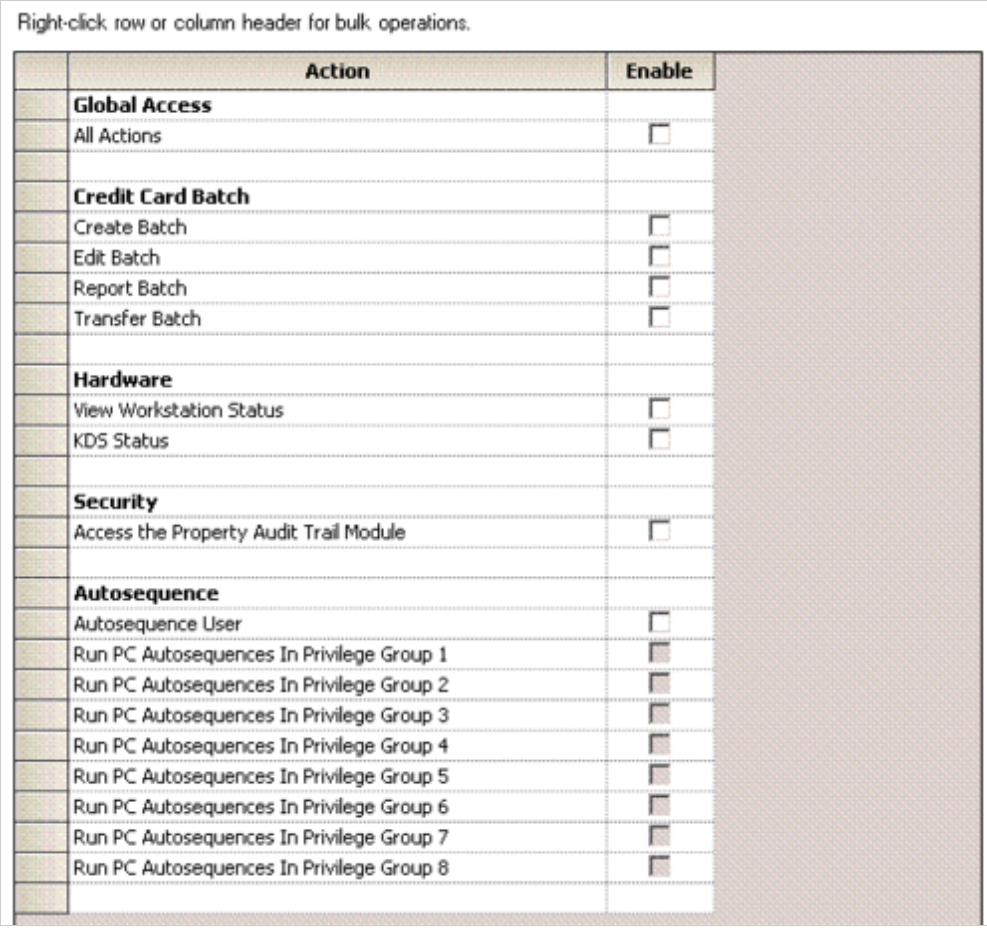
module without having to individually check each box. Further, this checkbox allows access to new modules that will be created in the future. For instance, if a new module "voice ordering" is created and released in a new version, an employee with "All Access" for "View" will be able to access this module without having a specific checkbox for the "voice ordering" module. MICROS recommends that administrator-type roles have the "All Access" option checked, so that administrators will always be able to access every module in the system.

Actions Tab

From the Actions tab, roles are given access to specific actions that can be performed in EMC. Note that all the "Run PC Autosequences in Privilege Group X" checkboxes are disabled unless the "Autosequence User" field is enabled first.

All Actions

Similar to the "All Access" checkbox on the EMC Modules Tab, this checkbox gives users associated with this role permissions to perform all actions. MICROS recommends that administrator-type roles have this option checked, so that administrators will always be able to perform all types of actions, including future actions that are not currently in the system.



The Actions tab of the Roles module. This tab determines what types of actions a user may perform.

Operations Tab

The operations tab contains all option bits related to workstation functionality. The operations tab itself is broken down into sub-tabs based on similar functionality: Timekeeping, Voids, PMC, etc. There are over 200 operational bits so it could be difficult to find an option by searching on the various tabs. To quickly find options, use the Search tab to perform a text comparison. The example image shows a search for discount option bits.

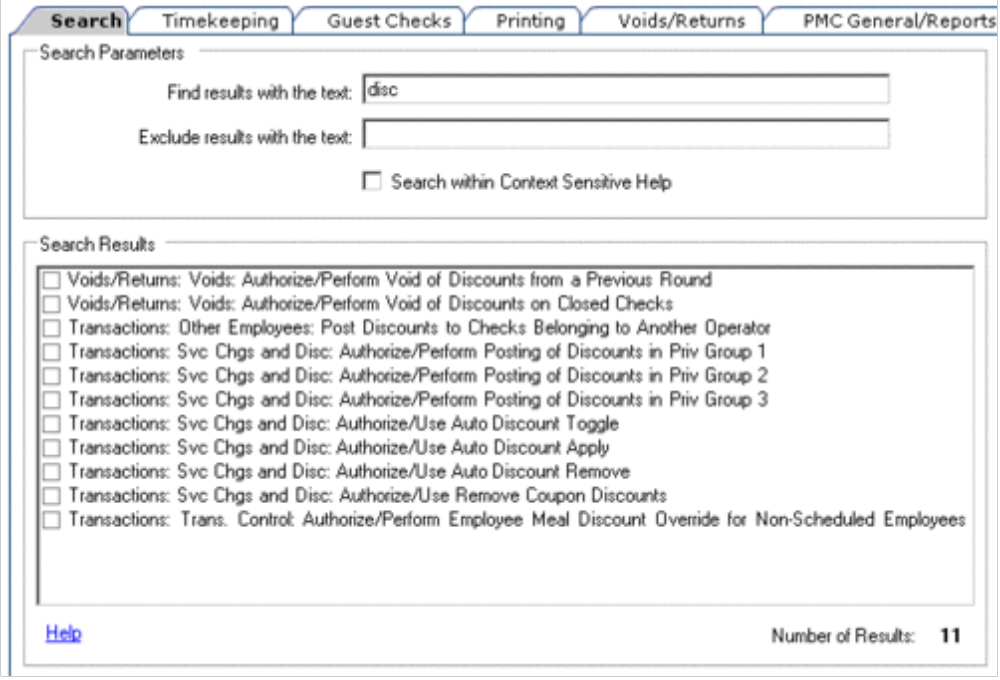
Properties Tab

On the properties tab, the Role is assigned to individual properties or assigned to the Enterprise. In many situations, a Role will be assigned to the Enterprise — it is likely that a "Server" or "Bartender" role is the same

for all properties.

View Tab

The view tab contains two option bits that control the properties and Revenue Centers that users can view:



The Operations Tab in Roles is split into several other tabs. The Search Tab allows users to quickly find option bits. In the example, typing "disc" allows the user to quickly find discount-related options.

Enable Property-Level Security

Employees associated with a Role that has this option checked will only be able to view properties to which they are assigned. This functionality affects EMC users only. Employees are assigned to properties in the Enterprise Employee Module. ***Note:*** *When an employee is associated with a role with this bit enabled, the employee will not be able to add new properties, even if the user is associated with an Enterprise Role with the "Add Properties" bit enabled.*

Enable Revenue Center-Level Security

Employees associated with a Role that have this option checked will only be able to view Revenue Centers in which they are an operator. Employees can be set as an operator in a Revenue Center in the Employee Edit Form. ***Note:*** *When an employee is associated with a role with this bit enabled, the employee will not be able to add new revenue centers, even if the user is associated with a Role with the "Add Revenue Centers" bit enabled.* See also, Property Employee Record: Property-Level Security.

Determining Employee Access

Multiple roles can be assigned to a single employee. If this is the case, how is it determined that an employee has a specific privilege? Quite simply, an employee has a privilege if *any one of his roles* contains the appropriate privilege. Consider an employee with the following employee roles:

In the example shown, we are trying to determine the user's ability to do voids in Property A. Our example assumes that Role 1, Role 2, and Role 3 are all available in Property A.

- Role 1 (cannot perform voids)
- Role 2 (cannot perform voids)
- Role 3 (can perform voids)

This employee may indeed perform voids, because at least one Role has the appropriate privilege. When discussing employees and roles, the sentence is usually written like this: *an operator has access to (some privilege) only when associated with an Employee Role with....* Because employee's don't *belong* to employee roles, it is necessary to make the distinction that an employee is simply associated with one or more roles; the

employee does not belong to a role.

Job Code Overrides

When a job code is configured to be linked to an employee role, employees who are clocked in to that job code will inherit the permissions of the job code for the duration of the shift. This situation is ideal when two job codes exist: Server and Floor Manager. By linking both of these to appropriate Roles, a user who is clocked-in as a Floor Manager will have privileges to perform voids, but when that same user is clocked-in as a server, he will not. To summarize, there are two methods for programming Job Codes:

- The Role field is set to 0-None, the operator will have privileges based on the role(s) assigned in the EMC.
- The Role field is not 0-None, the operator's privileges from EMC do not apply. Only the privileges associated with the role from this field will be active for the duration of the Clock-In Cycle.

Programming Job Code Overrides

For companies that use Simphony's timekeeping features and require all hourly employees to clock in, the following configuration provides optimal security with the least amount of programming:

- Program an Employee Role that allows users to clock in. This role could be named "Ability to Clock In", and it would be programmed with the following options enabled:
  - Clock in at Rate 1 (through 8, as appropriate)
  - Clock in at Rates 9-255 (if appropriate)
- Every employee in the enterprise who clocks in should be associated with the "Ability to Clock In" role and *no other roles.*
- Every job code is linked to an Employee Role. Some examples:
  - A "bartender" job code will be associated with a role (probably also called "bartender") that allows ability to open cash drawers and perform fast transactions.
  - A "server" job code will be associated with a role that allows ability to begin tables.
  - An "hourly manager" job code will be associated with a role that allows ability to perform voids and other authorizations.
- Other employees (those who are on salary) do not clock in. These employees will have one or more employee roles assigned within EMC.

Best Practices

In general, there are two types of Employee Roles:

1. Roles relating to workstation operations
2. Roles relating to EMC access and security

When considering Role programming, one must consider the type of role being programmed.

Operational Roles

For operational Roles, the general case is that an employee is only associated with one single role. For example, John, Joe, and Mary are all bartenders, so they should all have the same privileges; only one role needs to be created. This role will include all bits and privileges necessary for bartenders to perform workstation operations.

Note: *In an enterprise environment, ideal programming is that a single role, "Bartender", exists for all properties in the enterprise, causing bartenders in every property to have the same permissions.*

EMC Roles

For EMC-related roles, ideal programming is not done by the job title, but rather by the task being performed. For instance, the following EMC-related roles might be found in a well-programmed database:

- EMC All Module Access
- EMC Add and Edit Menu Items
- EMC Delete Menu Items
- EMC Add Employees
- EMC Edit Employees
- EMC Delete Employees
- EMC Add/Edit/Delete Menu Item Class
- EMC All Access to Hardware Modules

The role names in this example all begin with "EMC". While not necessary, this method of programming may help users to immediately realize that the roles relate to EMC functionality.

With these roles programmed, employees can be assigned roles based on the types of tasks they perform and/or the confidence level of an EMC Administrator (the person who assigns roles to users) in the person who will be given a role. A floor manager for a single Revenue Center may have only the "EMC Add and Edit Menu Items" role enabled; someone from accounting may be associated with "EMC Add Employees" and "EMC Edit Employees"; an employee who maintains the hardware on site may be associated with the "EMC All Access to Hardware Modules". As the floor manager becomes more confident and comfortable with EMC programming, perhaps the administrator will assign the "EMC Add/Edit/Delete Menu Item Class" role for that user.

Programming EMC Roles in this manner will allow the most flexibility in the system. Note that the first role, "EMC All Module Access" should exist in every database; an administrator should always be able to access every module. Also, each of the roles (except the "EMC All Module Access" role) should probably be programmed with the "Enable Property-Level Security" and "Enable Revenue Center-Level Security" options enabled, to prevent users from viewing information outside the properties or revenue centers where they work.

Other Considerations

If the logged-in user makes changes to a Role that is assigned to him- or herself, these changes will not be reflected until the Employee disconnects the EMC session (File > Disconnect) and reconnects.

Employee Closed Check Report

The **Employee Closed Check Report** lists all checks that have been closed by an employee, including reopened checks that were closed again and checks closed as memo checks. In addition, special symbols on the report indicate if the check was transferred, re-opened, split, or added.

This article discusses PMC functionality.

This article discusses behavior that is important for **Reporting**.

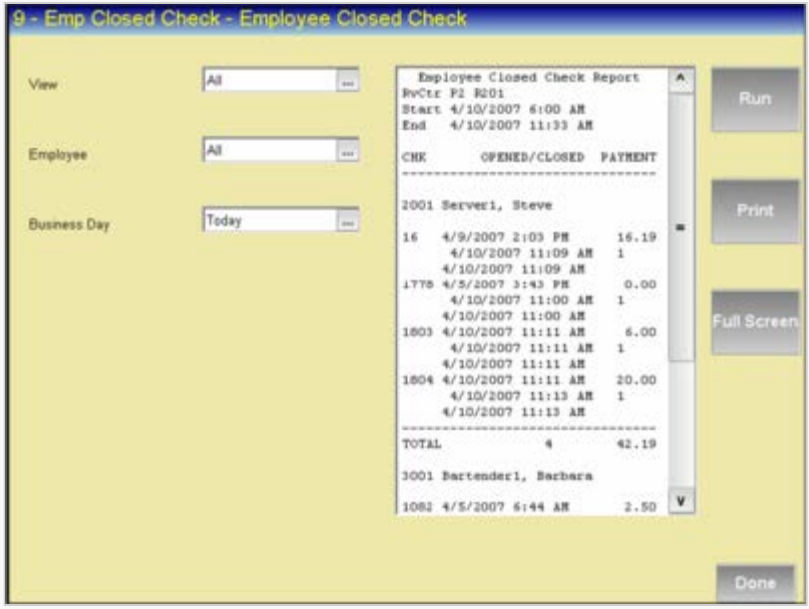
Contents

- 1 PMC Report
- 2 mymicros.net Report
- 3 Report Examples
- 4 See also

PMC Report

The PMC version of the report allows a choice of **View**, **Employee**, and **Business Day**. The report can be taken for a Property, Revenue Center, Prompt, or Inherit.

For general information about PMC Reports, see WS Autosequences.

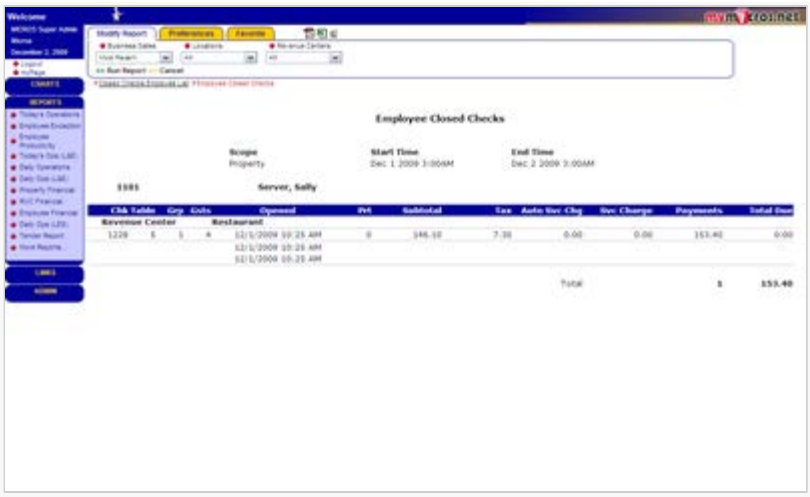


A view of the Employee Closed Check Report in the PMC.

mymicros.net Report

The **Employee Closed Check Report** is available online at mymicros.net for anyone who has access. The report can be run per Location and Revenue Center, as well as for a specific date or range of dates for any specific employee. The report lists each check

out by check number. This allows users at the Enterprise Level to see the report outside of the store.



A view of the Employee Closed Check Report in mymicros.net.

Report Examples

- PMC Employee Closed Check

See also

- PMC Reports
- WS Autosequences
- List of PMC Reports

Employee Journal Report

The **Employee Journal Report** is a Journal of all sales transactions by a specific employee shown in a check detail layout.

This article discusses PMC functionality.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Report Fields
- 2 PMC Report
- 3 mymicros.net
- 4 See also

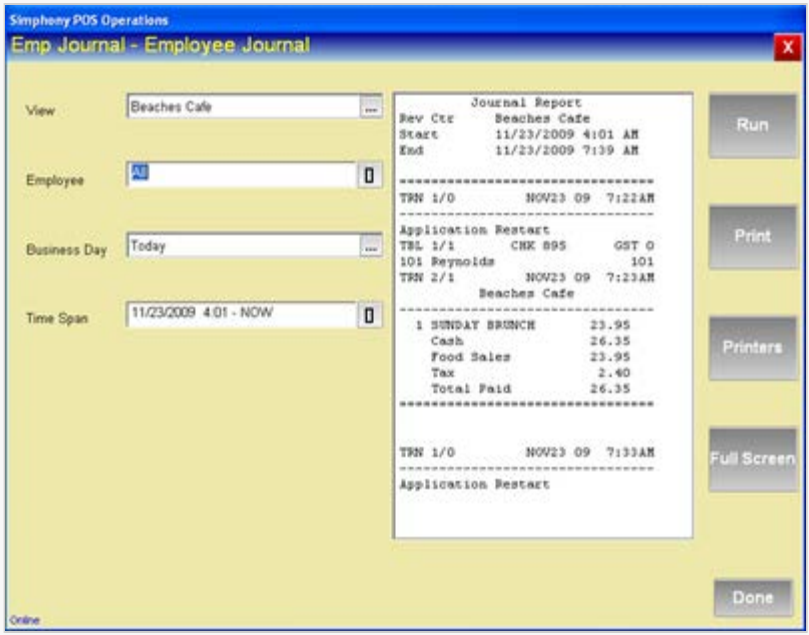
Report Fields

The Journal displays every check that has been rung in by a specific employee within the selected parameters. The check detail will show items that were purchased, voided, etc. The user can select a range of dates to display or select a specific date to look at for a specific employee.

PMC Report

The check detail will show items that were purchased, voided, etc. by Employee. The user can select a specific employee for the current day, or for a range of dates.

For general information about PMC Reports, see WS Autosequences.



A view of the Employee Journal Report in the PMC.

mymicros.net

Journal Reports are not available on mymicros.net, they are only available at the Property Level.

See also

- PMC Reports
- WS Autosequences
- List of PMC Reports

Employee Labor Detail Report

The **Employee Labor Detail Report** provides an account of work performed by each employee. The report includes the dates, times, and job rates of each clock-in and clock-out, the total hours of regular and overtime worked at each Job Code, and the gross pay earned.

This article discusses PMC functionality.

This article discusses behavior that is important for **Reporting**.

This article discusses time and attendance features or functionality.

Contents

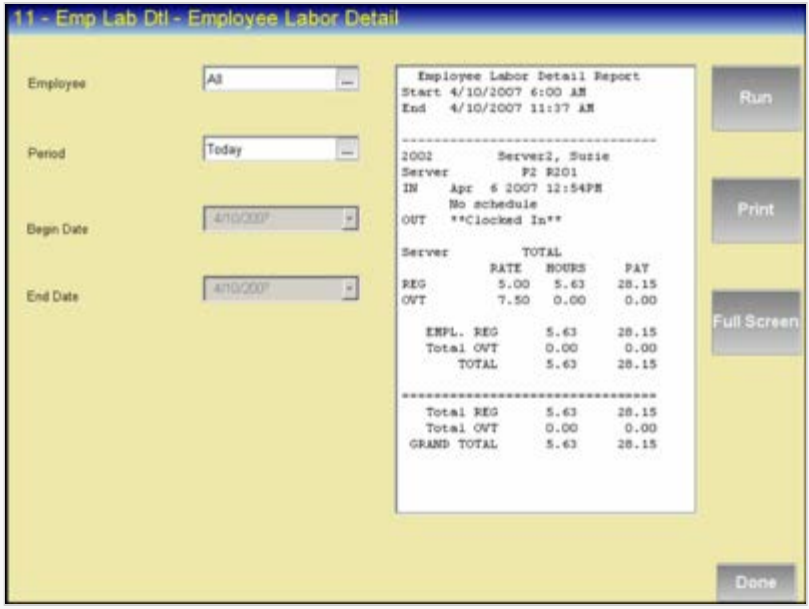
- 1 PMC Report
- 2 mymicros.net Report
- 3 Report Examples
- 4 See also

PMC Report

The PMC version of the report allows a choice of **Employee** or **Period**. Additional notes:

- The **Begin Date** and **End Date** fields are active when the "Period" is configured as "Enter Dates"
- The report can be taken for a Property, Prompt, or Inherit.

For general information about PMC Reports, see WS Autosequences.



A view of the Employee Labor Detail Report in the PMC.

mymicros.net Report

This section of this article is a stub. This means that this page requires more information than it currently has. To request immediate attention for this page or to add suggestions, click here.

Report Examples

- PMC Employee Labor Detail

See also

- PMC Reports
- WS Autosequences
- List of PMC Reports

Employee Labor Summary Report

The **Employee Labor Summary Report** provides a summary of the regular and overtime hours worked by each employee at each of their assigned Pay Rates.

This article discusses PMC functionality.

This article discusses behavior that is important for **Reporting**.

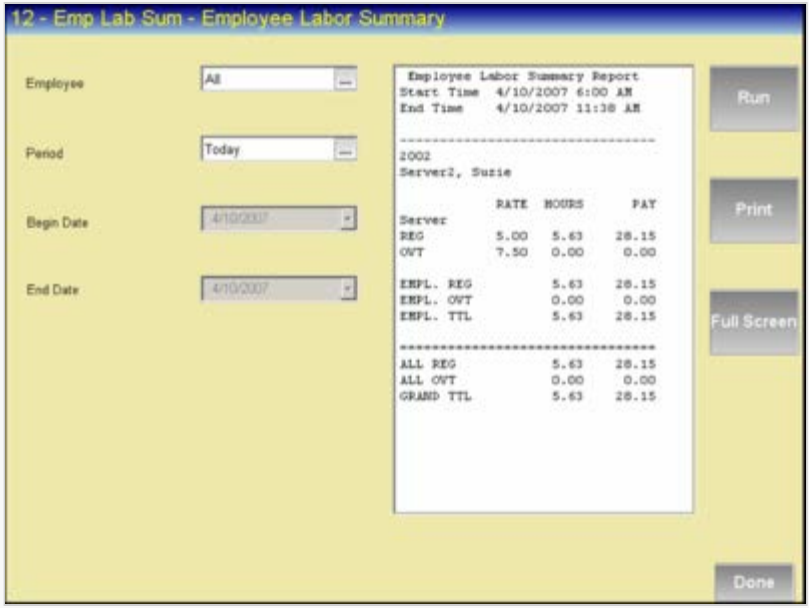
Contents

- 1 PMC Report
- 2 mymicros.net Report
- 3 Report Examples
- 4 See also

PMC Report

The PMC version of the report allows a choice of **Employee** and **Period**. Additional notes:

- The **Begin Date** and **End Date** fields are active when the "Period" is configured as "Enter Dates".
- The report can be taken for a Property, Prompt, or Inherit.



A view of the Employee Labor Summary Report in the PMC.

mymicros.net Report

This section of this article is a stub. This means that this page requires more information than it currently has. To request immediate attention for this page or to add suggestions, click here.

Report Examples

- PMC Employee Labor Summary

See also

- PMC Reports
- WS Autosequences
- List of PMC Reports

Employee Permissions Report

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The Employee Permissions Report (previously named the Nevada Gaming Board Report) shows employee configurations, employee roles and employee classes within a specific property or for the enterprise.

This article discusses functionality that relates to **Personnel**.

This article discusses a topic related to **security**.

This article discusses a **tool, utility, or other application** that is used by the Simphony system.

Contents

- 1 Generating a report
  - 1.1 In Simphony 1.x
  - 1.2 In Simphony 2.x
- 2 Contents of the report
- 3 See also

Generating a report

In Simphony 1.x

Enter the following in a command-line utility:

```
SimphonyInstallationPath\etc\EmployeePermissionsReport\EmployeePermissionsReport.exe   -UN=EMC username -UP=password -S=transaction server name -O=output path and filename -P=comma-separated list of properties -L=language object number
```

In Simphony 2.x

This feature or functionality was introduced in Simphony version 2.7 MR3.

1. In the EMC, select Enterprise, select Tasks, and then select **Employee Permissions Report**.
2. Select the information to include in the report:

- **Employee Configuration**
- **Role Details**
- **Employee Classes**
- **Show Additional Details**

3. Click **Run Report**.
4. Print the report or save it as a text file. Printing a lengthy report could take several hours.

Contents of the report

The report contains the following sections.

Report Contents

The Report Contents section lists the information included in the report.

```
 1 - Report Configuration
 2 - Employee Roles by Property
 3 - Enterprise Roles
 4 - Employee Classes By Property
 5 - Employee Configuration
 6 - Role Options
 7 - Enterprise Role Information
 8 - Employee Class Information
```

Report Configuration

The Property Range section lists the properties included in the report.

```
******** Property Range ********

  1 - Shopping Mall East
  2 - Shopping Mall West
  999 - P999
```

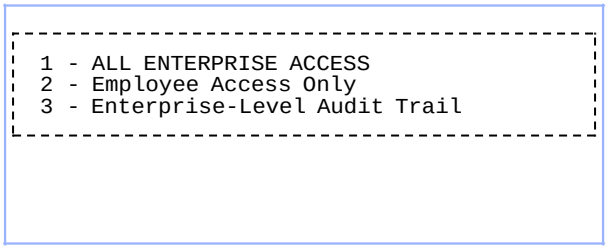
Employee Roles by Property

The Employee Roles by Property section lists each property and its associated employee roles.

```
All Properties:
  5 - ALL PRIVILEGES
  6 - Ability to Clock In
  20 - Server
  30 - Bartender
  86 - TERMINATD EMPs
  90 - Manager

1 - Shopping Mall East:
  10 - Cashier East

2 - Shopping Mall West:
  11 - Cashier West
```

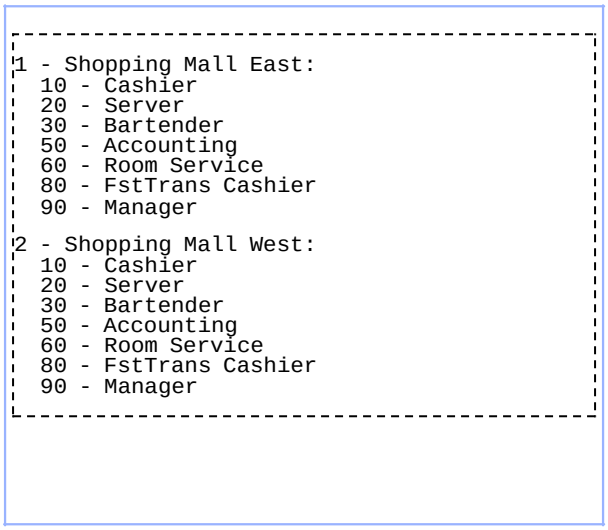
Enterprise Roles

The Enterprise Roles section lists all enterprise roles.



Employee Classes by Property

The Employee Classes by Property section lists each property and its associated employee classes.



Employee Configuration

The Employee Configuration section lists all employees with its assigned properties, roles, and classes.
This section only includes employees visible to the account specified in the -UN parameter. You can configure:

- Employee visibility using Employee Levels and Employee Groups.
- Employee ID visibility using the **[View Employee ID]** option for the Employee Role to which the specified account belongs.

```
Emp            ID Number      First Name           Last Name            Level

1               686            Bob                  Smith                 1

  1 - Shopping Mall East Roles:
     * 30 - Bartender

  1 - Shopping Mall East Class:
     * 30 - Bartender



4000            0              Mike                 Rose                  8

  Enterprise Roles:
     * 1 - ALL ENTERPRISE ACCESS

  All Property Roles:
     * 5 - ALL PRIVILEGES

  1 - Shopping Mall East Roles:
     * 30 - Bartender               * 20 - Server
     * 90 - Manager

  1 - Shopping Mall East Class:
     * 30 - Bartender

  2 - Shopping Mall West Roles:
```

```
      * 90 - Manager
```

Role Options

The Role Options section lists the options and permissions assigned to each role.
The options list indicates whether each option has been set to ON or OFF, as shown in Example 1.
The permissions list shows the View, Edit, Add, and Delete status for each set of files in the EMC, as shown in Example 2.

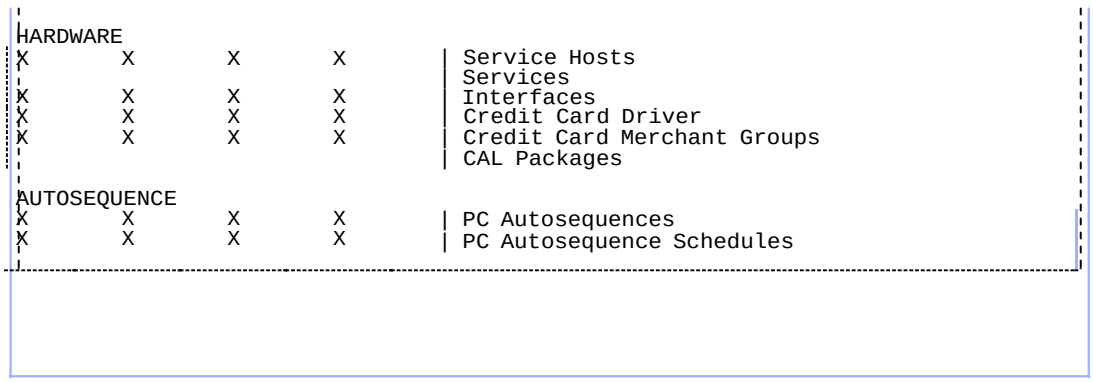
```
** Example 1 **
**** Checks and Receipts Options ****
  ON - Authorize/Perform Printing of Memo Checks
  ON - Authorize/Perform Reprinting of Memo Checks
  ON - Authorize/Perform Reprinting of Closed Checks
 OFF - Authorize/Perform Unlimited Reprinting/Printing of a Check
```

```
** Example 2 **
View    Edit    Add     Delete  | File
================================|  ==============================
GLOBAL ACCESS
                                | All Access

PROPERTY FILES
                                | Property Parameters
                                | Install User Security
                                | Property Descriptors
                                | Currency
                                | Help Screens
                                | RVC Configuration
                                | Property Merchant Groups

PROPERTY SALES FILES
                                | Tax Table
                                | Tax Classes
X       X       X       X       | Discounts
                                | Service Charges
X       X                       | Tender Media
```

Enterprise Role Information

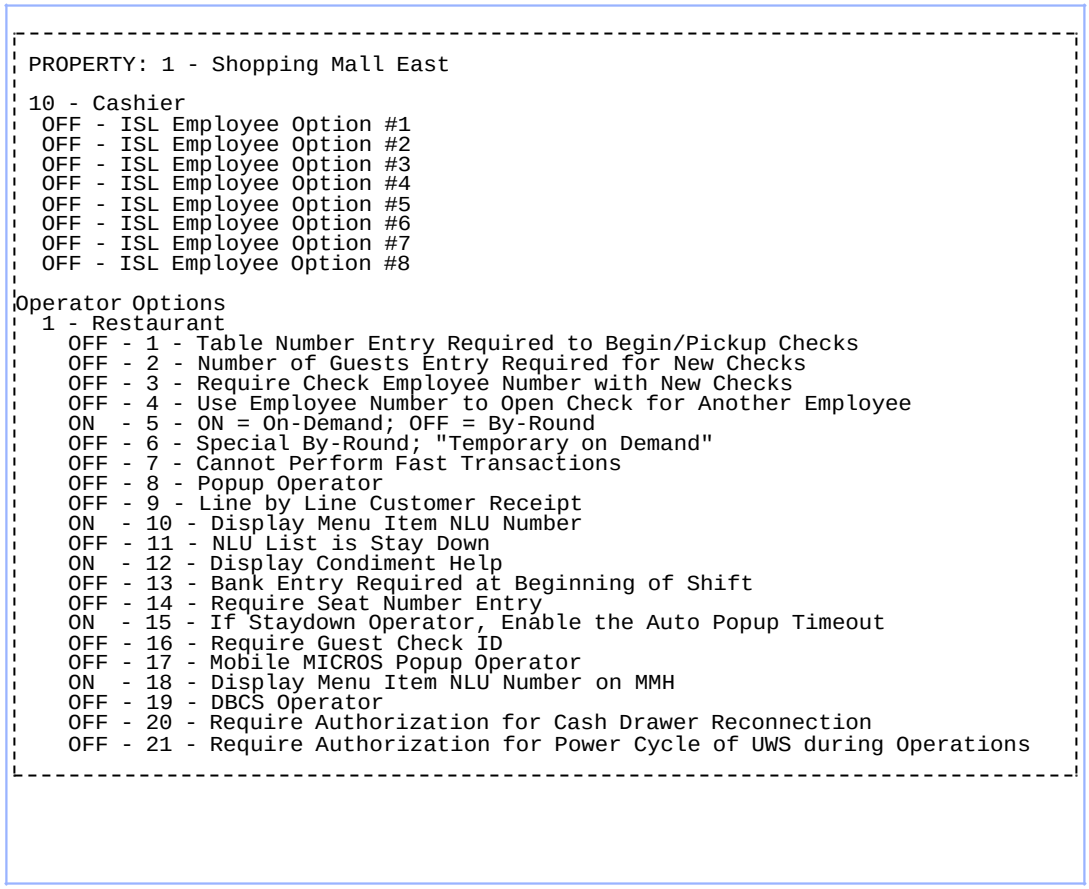
The Enterprise Role Information section shows the permission status for each option configured for each enterprise role.

```
View    Edit    Add     Delete  | File
================================|  ==============================
GLOBAL ACCESS
X       X       X       X       | All Access

ENTERPRISE
X       X                       | Enterprise Parameters
X       X       X       X       | Properties
X       X       X       X       | Selection Hierarchies
X       X       X       X       | Languages
X       X       X       X       | Print Logos
X       X       X       X       | Touchscreen Bitmap

PERSONNEL
X       X       X       X       | Employees
X       X       X       X       | Enterprise Roles
X       X       X       X       | Roles
```



Employee Class Information

The Employee Class Information section lists each property, its associated employee classes, the status of each configured ISL option for each employee class, and the status of each operator option for the property.



See also

- Tools and utilities category

Employee Tip Report

The **Employee Tip Report** summarizes the total tip activity by employee.

This article discusses behavior that is important for **Reporting**.

Contents

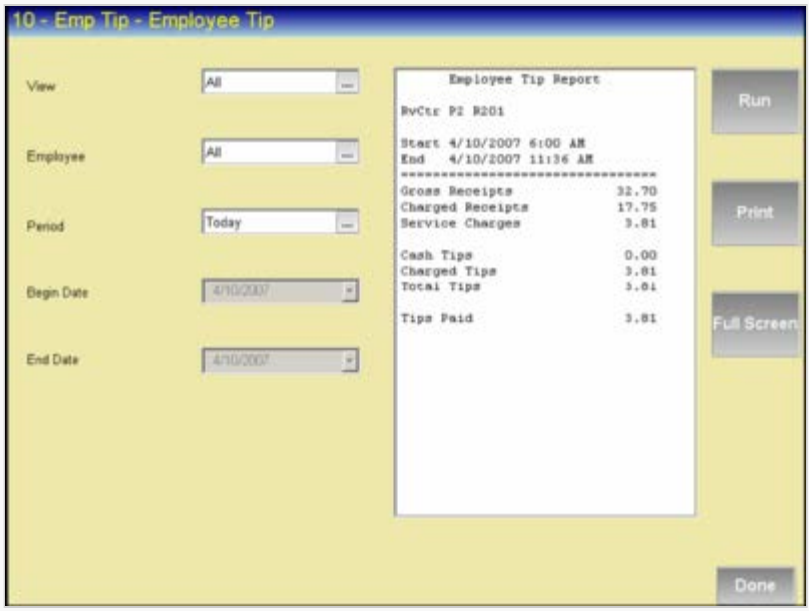
- 1 PMC Report
- 2 mymicros.net Report
- 3 Report Examples
- 4 See also

PMC Report

The PMC version of the report allows a choice of **View**, **Employee** or **Period**. Additional notes:

- The **Begin Date** and **End Date** fields are active when the "Period" is configured as "Enter Dates".
- The report can be taken for a Property, a Revenue Center, Prompt, or Inherit.

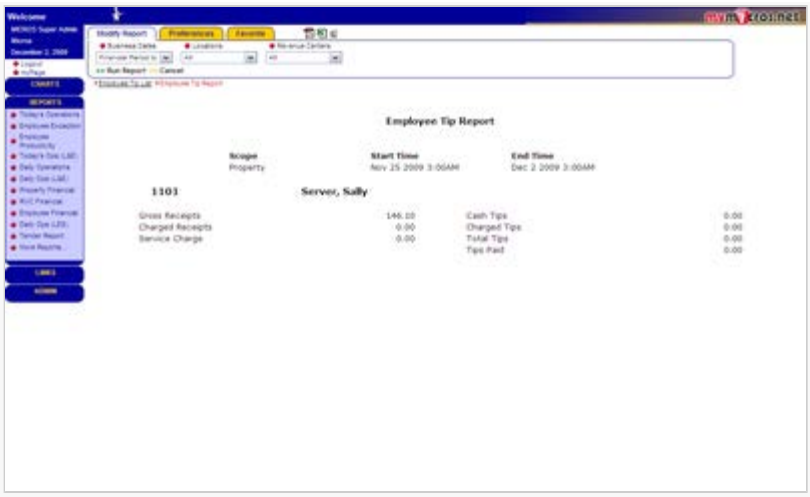
For general information about PMC Reports, see WS Autosequences.



A view of the Employee Tip Report in the PMC.

mymicros.net Report

The **Employee Tip Report** is available online at mymicros.net for anyone who has access. The report can be run per Location and Revenue Center, as well as for a specific date or range of dates for any specific employee. This allows users at the Enterprise Level to see the report outside of the store.



A view of the Employee Tip Report in mymicros.net.

Report Examples

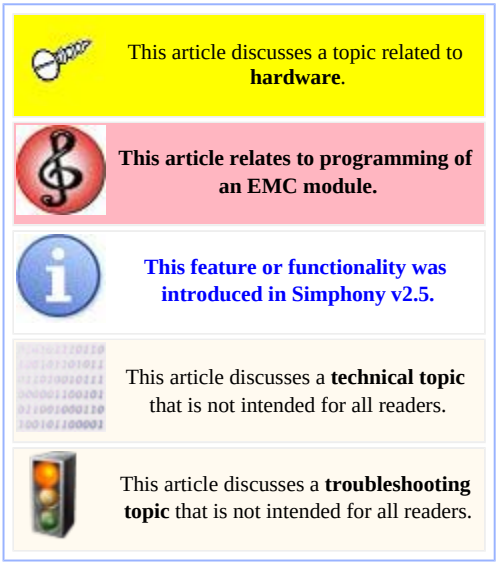
- PMC Employee Tip

See also

- PMC Reports
- WS Autosequences
- List of PMC Reports

Enabling IP Printing and Logging

This article is based on changes made with the release of Simphony v2.5 in reference to the enhanced performance of IP Printing and the enabling of IP Printing logging for Win32 and Windows CE clients.



Contents

- 1 Overview
  - 1.1 EMC Configuration for IP Printers
    - 1.1.1 Epson E4 IP Printer Configuration
    - 1.1.2 Using JP1 to Return the E4 module to its Default Settings
    - 1.1.3 Epson E5 IP Printer Configuration
  - 1.2 Recommended E5 IP Printer DIP switch settings
  - 1.3 Enabling IP Printer Logging
- 2 See also

Overview

IP Printing Status handling (such as Paper out/low, Door open, etc) has been simplified and Printer logging has been enabled for both Win32 and Windows CE Ops clients. It's very important to have the IP Printers DIP switches set correctly in order to benefit from recent development for the fortification of IP Printing (Simphony v2.5 GR). Previously, IP printing log messages would all have disappeared. Currently, once correctly enabled, logging from MicrosDevices for IP printing now works as expected.

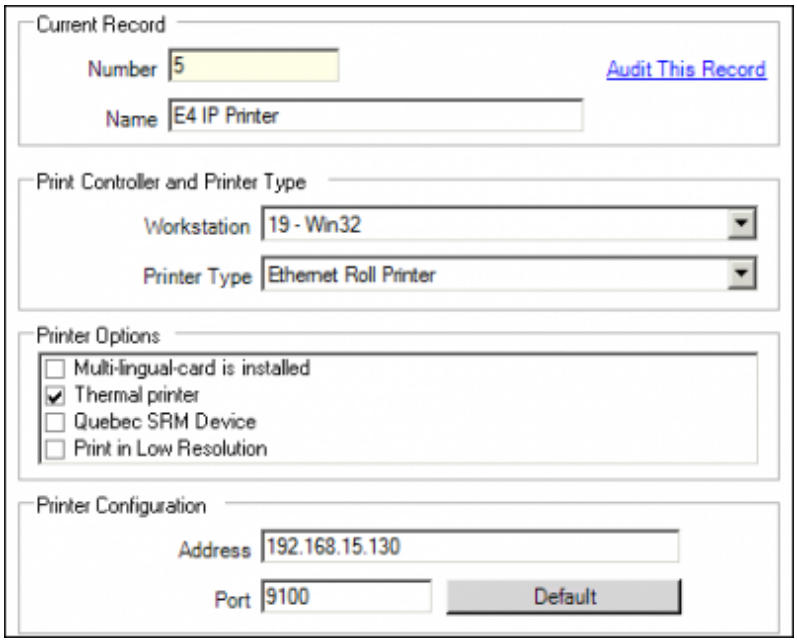
Warning! When increasing the verbosity settings for log files, the subsequent text output is considerable and therefore the log files can grow in size fairly quickly. Once the desired troubleshooting is completed, it's recommended to reset the verbosity settings back to '**0**' to avoid potential performance issues on the Ops clients.

EMC Configuration for IP Printers

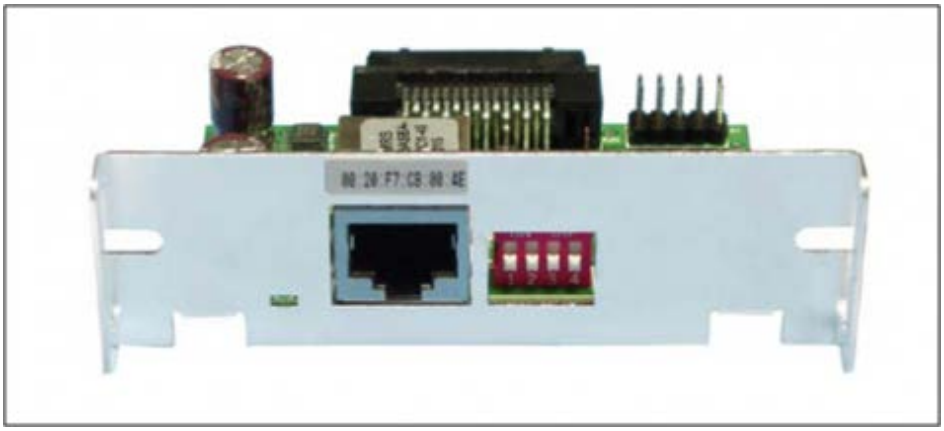
Epson E4 IP Printer Configuration

The Epson E4 module is also known as the '**Ethernet IV IP printer**', and is might also be known as the '**CyberData**' IP printer. The E4 module has a 4 way DIP switch and does ***not*** support multiple languages.

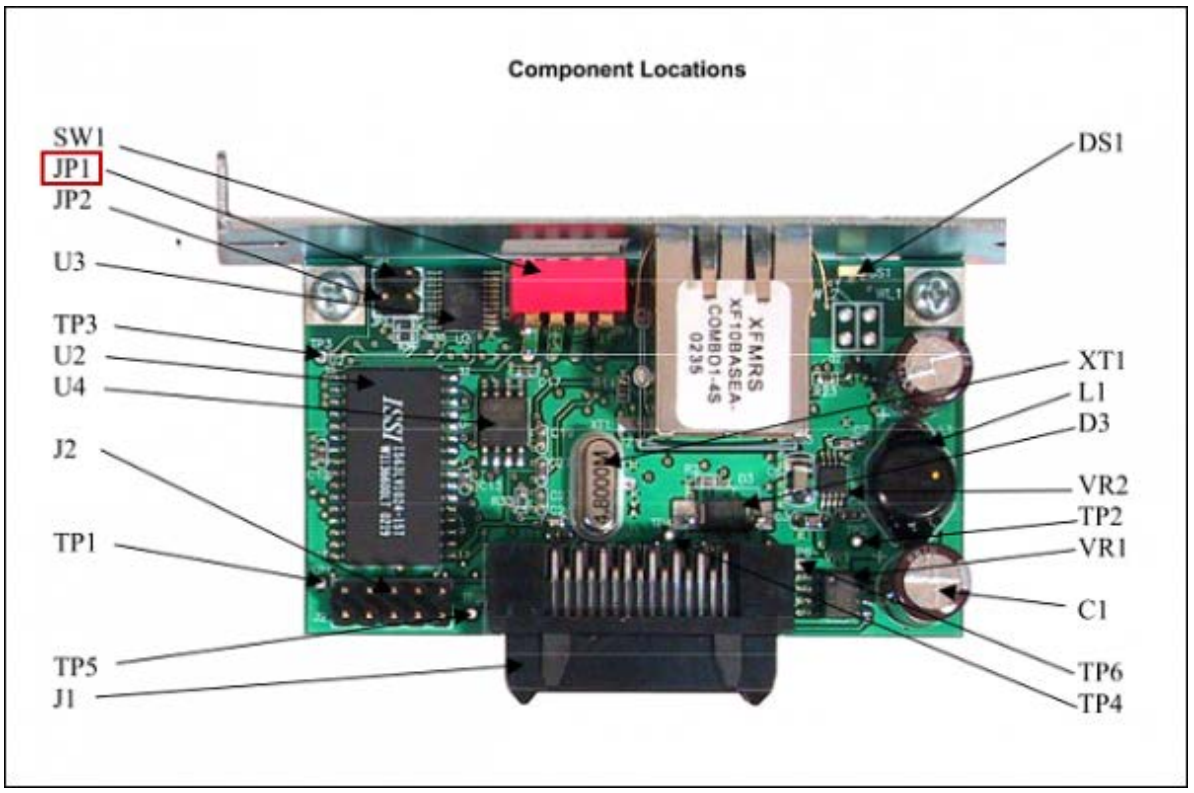
- Access the EMC-> Property level-> Setup tab-> Hardware/Interfaces-> Clients and Printing-> Printers module and configure the device accordingly.



- The PMC can be used to discover the E4 and display its configuration settings correctly. Once the E4 has been configured with the PMC, use the printer to verify that it has been configured correctly. To do this, toggle DIP switch '**1**' to ON from the back of printer, turn the printer on and wait a few seconds. It will print its current configuration settings. Next, verify that the printer can be pinged from the Workstation that will use it. At this point, power off the printer, turn DIP switch '1' OFF and power it up again. If the printer is used with DIP switch '1' ON, it will not work very reliably.



- In order to get the Epson E4 printer module to revert to its factory default Network configuration settings, follow the steps outlined below. The E4's default IP Address is 192.168.1.227.



The Epson E4 has 2 on-board jumpers as shown above.

```
JP1  ON – Reconfigure to factory default settings    OFF – Normal
JP2  ON – Not Defined                                OFF – Not Defined
```

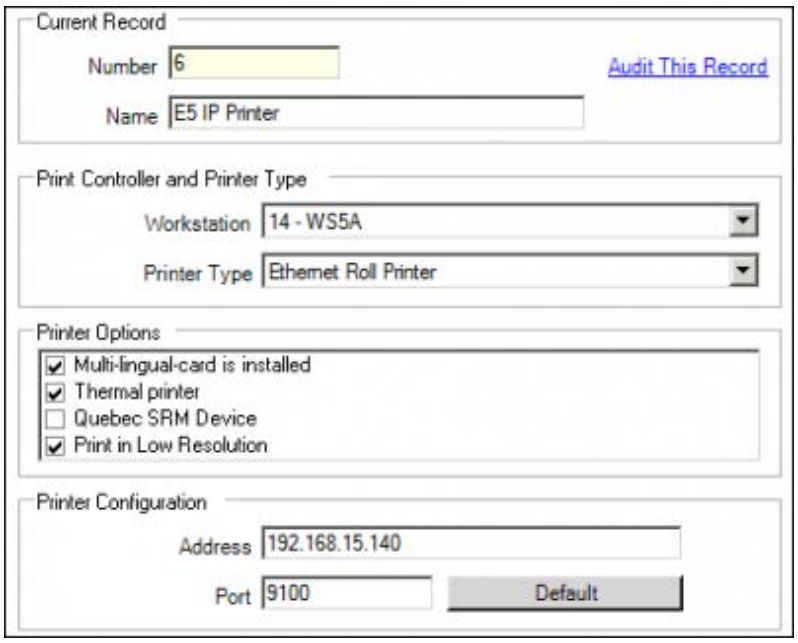
Using JP1 to Return the E4 module to its Default Settings

JP1 – ON forces the module to use factory default settings for configuration. All settings are returned to their default settings. The unique, factory assigned Ethernet Address and Serial Number are maintained. To use JP1, turn the power off to the printer. Remove the E4 module from the printer. Install the jumper across JP1. Install the module back into the printer. Power on the printer. Wait for the printer to initialize (printer feeds paper once), then power down the printer again. Remove the E4 module from the printer and remove the jumper from JP1. Re-install the E4 module back into the printer and power it back up. The E4 printer is now running with default settings and can be configured using the various utilities provided.

Epson E5 IP Printer Configuration

The Epson E5 module is also known as the '**Ethernet V IP printer'**, and is also known as the '**Multi-lingual'** IP printer and therefore ***does*** support the installation of a Multi-lingual card.

- Access the EMC-> Property level-> Setup tab-> Hardware/Interfaces-> Clients and Printing-> Printers module and configure the device accordingly.



- In order to get the E5 printer to revert to its factory default Network configuration settings, turn DIP switch '**7**' ON from the back of the printer. Cycle the printer's power and wait about ten seconds. It will print its default configuration settings. At this point, power off the printer and turn DIP '**7**' OFF and power it up again. If the printer is used with DIP switch '7' ON, it will not work very reliably. Now, the E5 printer should be able to be discovered using the PMC. Be aware that the PMC does ***not*** display the data returned by the E5 correctly, but the PMC can still be used to change the IP configuration. The default IP Address for the Epson E5 module is 192.168.192.168.

Note: The E5 does not return the discovery data in the expected format. More work is required to determine if this can be fixed while also supporting the E4 printer (which ***does*** return the data in the correct format).

- Once the E5 printer has been configured with the PMC, use the printer to verify that it has been configured correctly as PMC cannot display the configuration settings properly. To do this, turn DIP switch '**1**' ON from the back of the printer and cycle the printer's power and wait about ten seconds. It will print its current configuration settings. Verify that the printer can be pinged from the Workstation that will use it. At this point, power off the printer, turn DIP switch '**1**' OFF and power the printer up again. If the printer is used with DIP switch '**1**' ON, it will not work very reliably.

Recommended E5 IP Printer DIP switch settings

Users can also get the printers normal configuration by powering it up while pressing the Paper '**Feed**' button. There are two additional sets of switches that can be accessed via a small panel on the bottom of a TMT88 printer. Once the small panel door is opened:

- **DSW1** (closest to front of the printer) should have all of the DIP switches turned OFF.
- **DSW2** should have DIP switches '**1**' and '**8**' turned ON and DIP switches '**2**' through '**7**' should be turned OFF.

- **DSW1**, DIP switch '**2**' must be OFF to enable the 4k internal buffer.
- **DSW2**, DIP switch '**1**' being ON, ensures that the printer responds to status queries when the printer is in an error state. Also, with **DSW2** DIP switch '**1**' being ON, in Epson's lingo it means that, "The printer mechanism stops but does not become busy when: an error has occurred, the cover is open, due to a paper-end, or paper is fed using the paper feed button". (i.e., We do not want the printer to be **"busy"** or **"unresponsive"** when a fault occurs.

Older models of the TMT88 printer do ***not*** work with the IP cards however, the TMT88IV ***does*** work).

Enabling IP Printer Logging

See the Ops Client Logging Setup article for more details about accessing the Ops clients '**Web.config.txt**' and '**LogZone_LoadHandlers.txt**' files discussed below.

- For **Win32** clients there must be a zone added named '**Devices**' in the '**Web.config.txt**' file and a specified verbosity setting for the '**Devices**' zone in the '**LogZone_LoadHandlers.txt**'. The recommended verbosity setting value is '**4**'. This requires a restart of the Workstation to take effect.

- For **Windows CE** clients the verbosity level of the '**LoadHandlers**' zone must be increased. For Windows CE clients, logging for all zones is made under the '**LoadHandlers**' zone, so the verbosity setting only needs to be changed for this one zone. The recommended value is '**4**'. With the release of Simphony v2.5, verbosity changes can be made "on the fly" and no Windows CE client restart is required.

Shown below is an example of a 'LogZone_LoadHandlers.txt' file and the recommended logging verbosity setting per client platform for IP Printer troubleshooting:

```
LoadHandlers,4 = Recommended verbosity setting for Windows CE clients when
 troubleshooting IP Printing

CallHandlers,0
DebugHandler,0
Security,0
```

```
Timing,0
KDS,0
DataStore,0
OPS,0
OPSAutoTest,0
TtlsPosting,0
Reports,0
DbDownload,0
DbSync,0
CCs,0
ExtApps,0
PosCore,0
KDS,0
Printing,0
Devices,4 = Recommended verbosity setting for Win32 clients when
 troubleshooting IP Printing
```

See also

- Ops Client Logging Setup
- Simphony 2.5

Engagement IP Camera widget

This article provides more information about the IP Camera widget for the Engagement Feature.

Contents

- 1 Overview
  - 1.1 IP Camera Widget implementation
  - 1.2 How does the MJPEG Decoder library work?
  - 1.3 Device Support
  - 1.4 Security
- 2 See also

This feature or functionality was introduced in Simphony 2.7.

This article discusses functionality that relates to **Simphony v2.x**.

Overview

The Engagement IP Camera widget is used to display a camera feed on the User Interface (UI) screen as a widget. It allows the user to view live video from an IP camera configured using the Engagement Widget designer. The IP Camera widget uses the Motion-JPEG (MJPEG) video compression format. MJPEG is a video format in which each frame of video is sent as a separate and compressed JPEG image. The viewer displays those JPEG images as quickly as they are received and that creates the video.

IP Camera Widget implementation

The IP Camera widget is implemented using an **Image control** to render the camera feeds received as images on the UI screen. We are not using any separate media player. The IP Camera widget uses an open source library named MJPEG Decoder available in CodePlex.

The widget will initialize MJPEG decoder by passing an IP camera feed URL which is configured using the Engagement Widget designer. The widget will get appropriate events whenever a new image is available and will draw it on the container image control.

The widget **works with all resolutions supported by the IP Camera**. The image is resized to fit in the widget's dimensions, while it preserves its native aspect ratio in the detail view regardless of the resolution of the images received.

The widget is not saving any images to storage.

How does the MJPEG Decoder library work?

The library will initiate an asynchronous request to the MJPEG URL provided by the viewer. It then streams the multipart response data received into separate images as they are received. The library will pass each jpeg image to the viewer via an event whenever they are available.

Device Support

The IP Camera Widget supports all network/IP cameras capable of sending a direct MJPEG stream. This does not include cameras that are embedded within a webpage. The camera must provide a direct steam of only the MJPEG for the IP Camera widget to successfully display the feed.

Security

The IP Camera widget does not take additional security measures when displaying the IP Camera feed. Security restrictions should be implemented on the network to explicitly allow Workstations to connect to the camera feed. Additionally, the IP camera feed should be configured in a secure way to ensure username and password are included in the URL if possible.

Engagement 1.1 Release Notes

Copyright Information

Contents

- 1 Copyright Information
- 2 Release overview
- 3 Features and updates
- 4 System requirements
  - 4.1 Paths for the Engagement installation files
- 5 Issues
  - 5.1 Resolved
  - 5.2 Known Issues
- 6 See also

Release overview

The Engagement Release Notes describe new features and enhancements for this release of the product.

Features and updates

An Engagement Auditing tool has been added to track and provide access and operation details when you use the Engagement Configurator

CR ID#: N/A
TP ID#: 66854, 78636
You can now track and search a variety of operations after accessing and using the Engagement configurator. The auditing tool tracks and provides the date and time, user ID, user name, actions that were performed, and shows additional details about each operation.

Related Links: How to use the Engagement Auditing tool, Engagement Feature

Retrieval of the Engagement Organization ID is now available upon login

CR ID#: N/A
TP ID#: 77737
If forgotten, you can retrieve your Engagement Organization ID when entering your login credentials using a **Forgot my ID** link that has been added to the MICROS Login screen

Related Links: How to retrieve your Engagement Organization ID, Engagement Feature

The maximum allowable space and remaining available space to upload widget images now displays

CR ID#: N/A
TP ID#: 78060
You can view the maximum amount and remaining space available when uploading widget images to your hosted Engagement server.

Related Links: How to view the max data limit for your hosted Engagement server, Engagement Feature

System requirements

Engagement is compatible with the following platforms:

Category	Supported Products
Operating System for Engagement clients	Microsoft Windows 8.1.1

Paths for the Engagement installation files

Simphony Server files: *<Drive letter>:\MICROS\Simphony2**Engagement***

Workstation files: *<Drive letter>:\MICROS\Simphony2\EgatewayService\CAL\Win32\Packages\ServiceHost2.0\WebServer45**Engagement***

Once copied to the workstation(s):

*C:\Micros\Simphony\webserver**Engagement***\

Issues

Resolved

There are no new fixes in this version's release.

Known Issues

There are no known issues with this version's release.

Engagement 1.2 Release Notes

Contents

- 1 Copyright Information
- 2 Release overview
- 3 Features and updates
- 4 System requirements
  - 4.1 Paths for the Engagement installation files
- 5 Issues
  - 5.1 Resolved
  - 5.2 Known Issues
- 6 See also

Release overview

The Engagement Release Notes describe new features and enhancements for this release of the product.

Features and updates

Backward compatibility for Engagement widgets has been added

CR ID#: N/A
TP ID#: 78616
Backward compatibility for Engagement widgets has been added. This includes the following:

- New and existing widgets are configurable and compatible to share the same page while running on older workstations.
- If a new widget is not supported on an older Service Host version, an **Upgrade Service Host Version to Support New Widget** message appears that contains the required version information for compatibility.
- All Engagement versions support Simphony version 2.7 (or higher).

Related Links: Engagement Feature

Engagement Welcome and Hub page languages are translatable

CR ID#: N/A
TP ID#: 78624
When Engagement users access either a Welcome or Hub page; the pages are now translatable based on the hierarchies described below:

Listed in order of highest to lowest priority levels, **Hub** pages are translated using the first available translation:

1. **Current Ops client language (Highest priority level) -** Page language translation occurs based on the current language that the Ops client is utilizing and is being viewed that time.
2. **Employee's default language -** Page language translation occurs based on the employee's default language as configured in the Simphony *EMC, Enterprise, Configuration tab, Personnel, Employee Maintenance, Operator record, General tab, Language* field.
3. **Workstation's default language -** Page language translation occurs based on the default language assigned to the workstation from the Simphony *EMC, Property level, Hardware/Interfaces, Workstations module, General tab, Language* field setting.
4. **System's default language (Lowest priority level) -** Page language translation occurs based on the first record listed (which is always US-English and cannot be changed) in the Simphony *EMC, Enterprise level, Enterprise Information, Languages* module.

Listed in order of highest to lowest priority levels, **Welcome** pages are translated using the first available translation:

1. **Workstation's default language (Highest priority level) -** Page language translation occurs based on the default language assigned to the workstation from the Simphony *EMC, Property level, Hardware/Interfaces, Workstations module, General tab, Language* field setting.
2. **System's default language (Lowest priority level) -** Page language translation occurs based on the first record listed (which is always US-English and cannot be changed) in the Simphony *EMC, Enterprise level, Enterprise Information, Languages* module.

For those instances whereby widgets are translating (and showing) differing languages, the same hierarchy as described above would continue to apply. For example, if a Daily Specials Widget has a Chinese translation, but an Image Widget does not, the Daily Specials Widget would show Chinese and the Image Widget would default to the next available language, even though they are appearing on the same page. This scenario is consistent with Ops behavior when a translation does not exist for a specific field or item.

Related Links: How to configure language translation for Engagement, Engagement Feature

System requirements

Engagement is compatible with the following platforms:

Category	Supported Products
Operating System for Engagement clients	Microsoft Windows 8.1.1

Paths for the Engagement installation files

Simphony Server files: *<Drive letter>:\MICROS\Simphony2\Engagement*

Workstation files: *<Drive letter>:\MICROS\Simphony2\EgatewayService\CAL\Win32\Packages\ServiceHost2.0\WebServer45\Engagement*

Once copied to the workstation(s):

C:\Micros\Simphony\webserver\Engagement

Issues

Resolved

The following is a list of issues that have been fixed since the last release.

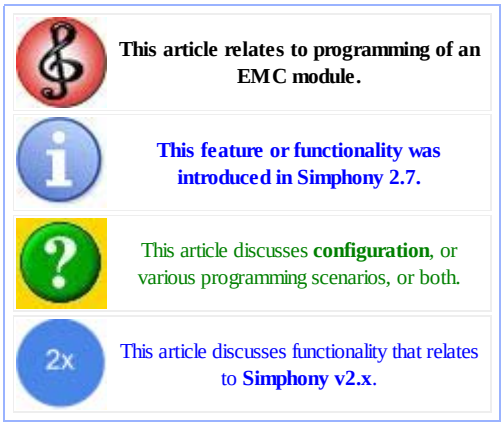
Module	CR ID	TP ID	Description
EMC	N/A	78152	**View Only** privileges that are assigned in the EMC, Enterprise Roles module, are now enforced when you attempt to access pages and make configuration changes. Additionally, the theme color of the page no longer unexpectedly changes.
Engagement	N/A	76378	You can now view log entries for errors related to the Web Configuration Console (WCC). The WCC log file is located in the following path: *<Drive letter>:\Micros\Simphony2\Engagement\WCC\Logs*
Engagement	N/A	83859	Engagement workstations assigned to newly created Simphony properties now can connect to the Engagement server at the Welcome screen.
Engagement	N/A	87189	When you create or clone new pages, the system now checks to see if existing page names already exist in an organization. If an attempt is made to duplicate a page name, you receive the following message: **Page name is already in use, please provide a unique name**
Ops	N/A	73395	Internal Ops functions 9-9-9 and 1-2-2-6-clear-clear-clear now work as expected on mTablet E Series devices while running Engagement. After you sign onto an Engagement workstation and press the 9 button three times (9-9-9), the mTablet's stats from the PMC, General tab appears. If you press 1-2-2-6 and the Clear button three times in succession (Clear-Clear-Clear), the current Engagement software build version appears.

Known Issues

There are no known issues with this version's release.

Adding and moving widgets for the Engagement feature

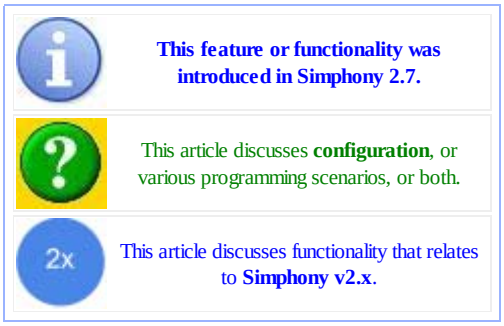
This article reviews how to add and move widgets for the Engagement feature.



1. Click on the Widget you wish to add from the Widget list.
2. To move the widget to a new grid location, click the widget and a move icon appears.
3. Click the Move icon and then click the new grid location. Widgets move based on clicking the left corner (upper left corner on large widgets) and automatically resize when moved to a smaller section of the grid.

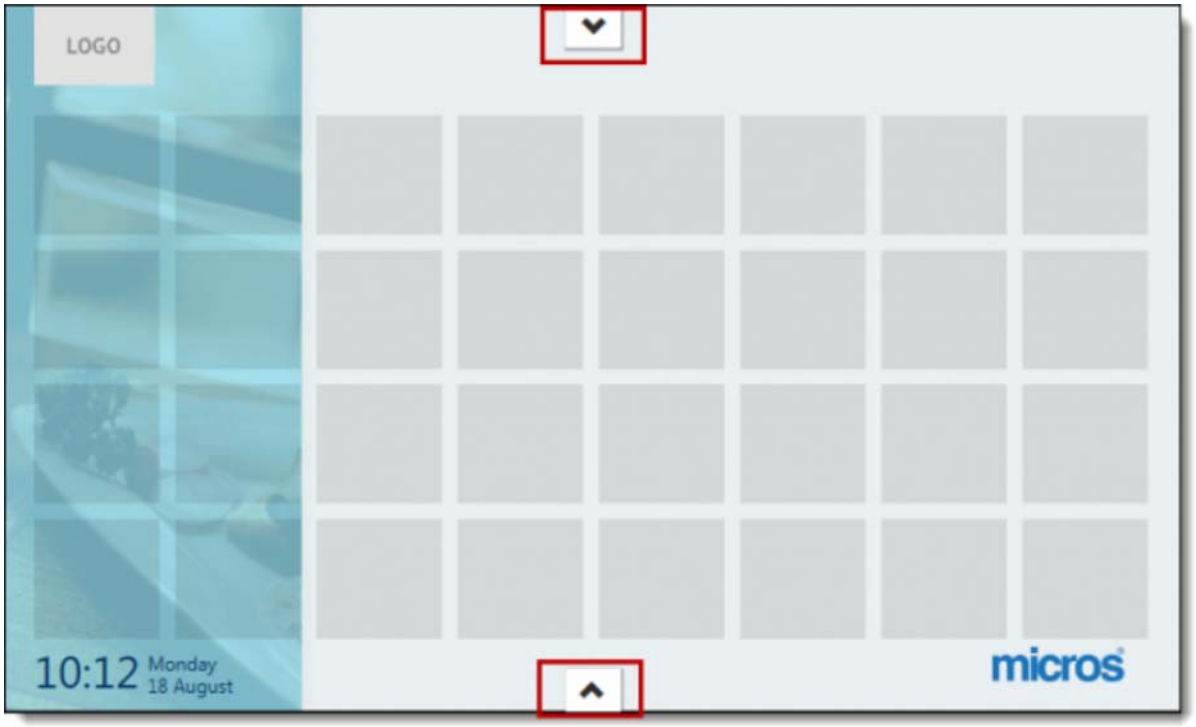
Adding POS Command buttons for the Engagement feature

This article reviews the steps to add and configure buttons to perform common Ops commands from the mTablet E Series devices running the Engagement feature.



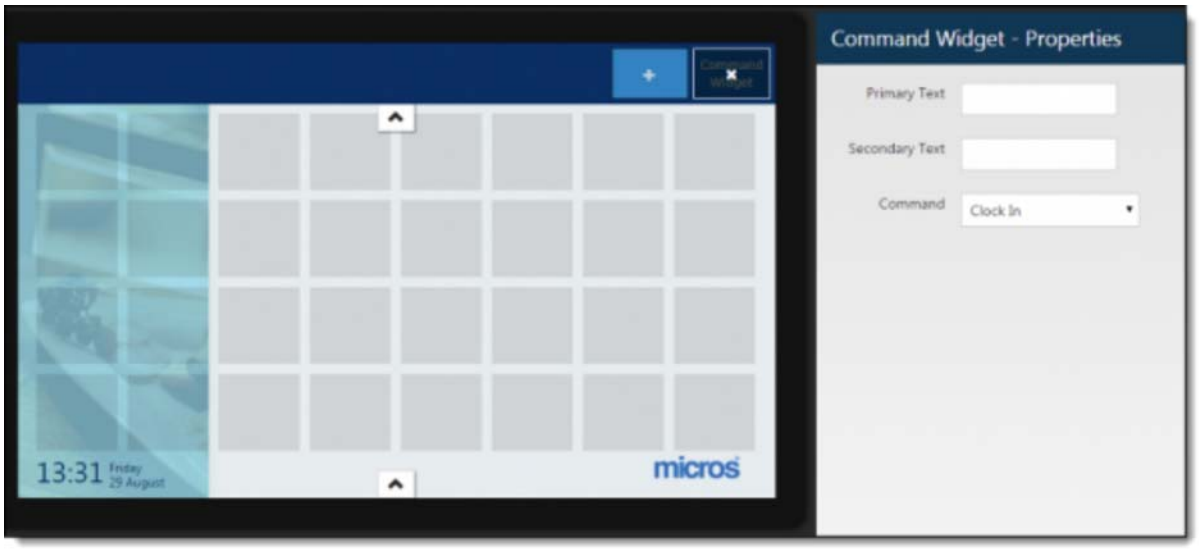
If you want to provide additional ways to perform typical POS functions such as clocking in or out, editing menu items or updating the client's database, you can add POS command buttons. These buttons remain hidden and get exposed when a user swipes the top or bottom of the POS client touchscreen.

1. Click on either the top or bottom



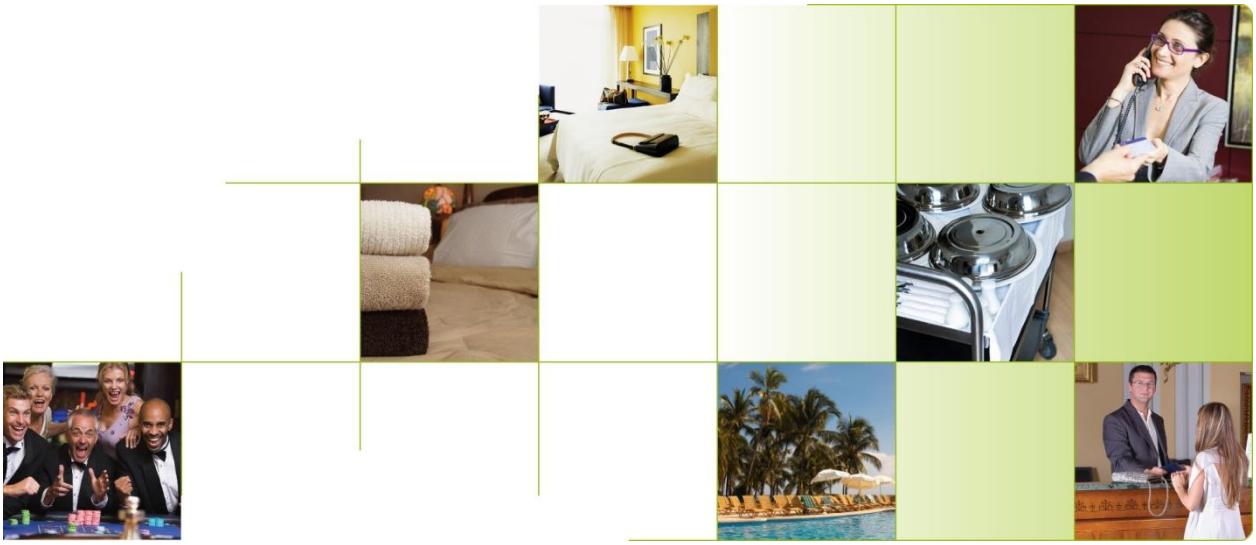
directional arrow depending on which place you want to add the buttons. The top and bottom command bars work independently of each other.

2. Click **(+)**.



3. Add Primary Text and select a Command to be assigned to that button.
4. Click **Save**.

micros®



MICROS Engagement Best Practices

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Simphony Versions 4
Supported Devices 4
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Engagement Configuration 7
URL Widget 7

Introduction

Securing network and Point-Of-Sale (POS) devices achieves and maintains PCI-DSS compliance. This guide provides security best practices and installation steps for the MICROS Engagement feature.

Topics include securing and installing the POS device through:

- Supported Devices
- Configuration Best Practices

Simphony Versions

System and device recommendations throughout this guide are based upon version 2.7 of the MICROS Simphony Enterprise Point-of-Sale.

Supported Devices

The following devices support the Engagement feature.

Tablets

Device	Operating System	Support Status
E-Series 8”	Windows 8.1	Supported
E-Series 11”	Windows 8.1	Supported
Dell Venue Pro 8	Windows 8.1	Supported
Dell Venue Pro 11	Windows 8.1	Supported

Networking

Revew all security related documentation that is available from the MICROS website: http://www.micros.com/ServicesAndSupport/InformationSecurity/.

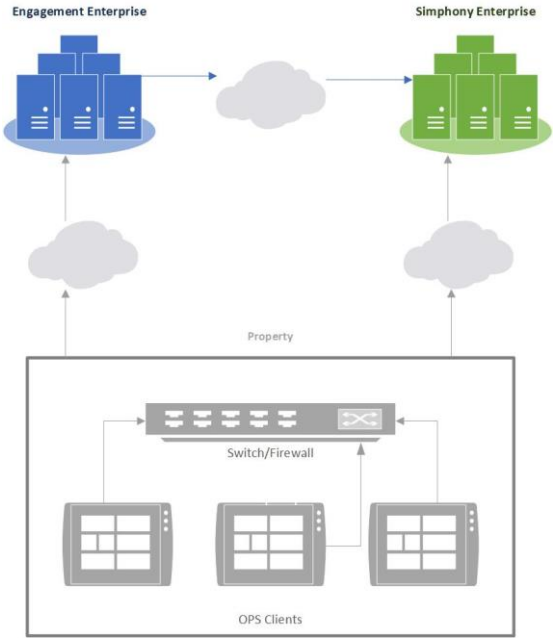
The MICROS Wireless Networking Best Practices v2 Guide, available from the following link, provides unique instructions for the configuration of MICROS devices.

http://downloads.micros.com/pub/PABP/Simphony/Micros_Wireless_Networking_Best_Practices_v2.pdf

Engagement Firewall Considerations

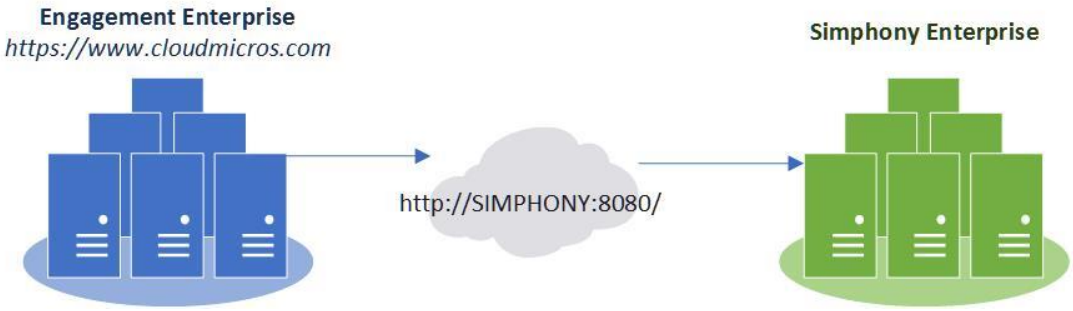
It is critical to ensure a firewall is in place that restricts inbound and outbound traffic per PCI_DSS_V3 requirement 1.3- Prohibit direct public access between the Internet and any system component in the cardholder data environment.

The diagram to the right summarizes the communication model of Engagement with a Simphony v2.x Enterprise.



Simphony Enterprise Communication

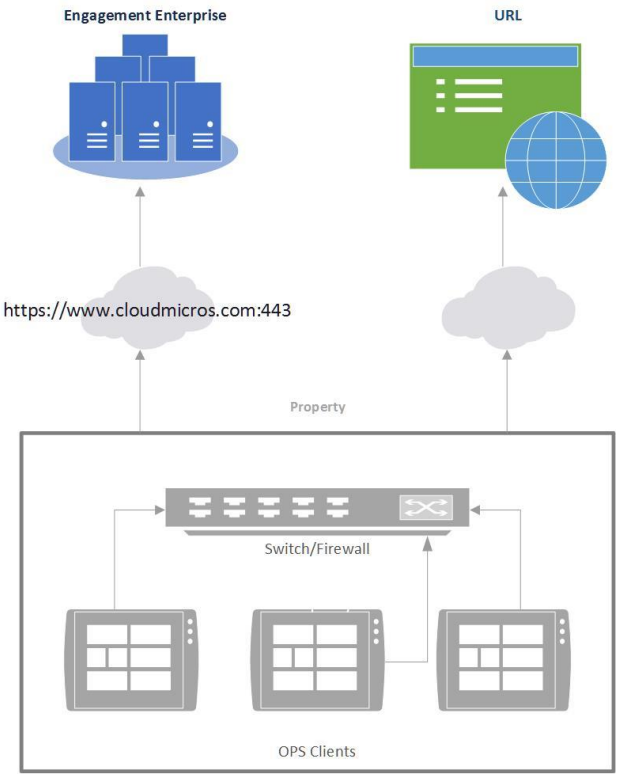
The Engagement Enterprise will make requests to the Simphony Enterprise through the Simphony2 site to register and perform syncs. The Simphony Enterprise must allow inbound requests from the URL: https://www.cloudmicros.com/ on port 443



Property Communication

Workstations will make outbound requests for Pages, authentication & content to the URL: https://www.cloudmicros.com/ on port 443

In addition to the Engagement Enterprise, firewall rules need to ensure any URL used within Engagement is allowed through an outbound request. This includes the URL Widget, PDF Widget, IP Camera, or any other external content being used within Engagement.



Engagement Configuration

The MICROS Engagement feature allows a user to configure live tiles and content to be displayed on a POS device. It is imperative to ensure any external data sources or URLs provided through Engagement are secure and from a trusted source.

URL Widget

The URL widget, which will display web content from the configured location, has some security precautions built into it. By default the URL widget will lock the user into the domain of the link provided. Any links within an available page that are outside of the domain are disabled and cannot be navigate to.

An example of this is a URL widget for http://www.micros.com. Any link outside of *.micros.com is automatically disabled for the user

The following best practices must be used when configuring the URL widget and the device it is running on:

1. Internet Security Settings – The security settings for the browser within the Engagement feature are defined by the settings of Internet Explorer browser within Windows. By changing the settings of IE, e.g. not allow cookies, you are also changing the settings within the Engagement browser.

   Settings **cannot be turned below Medium-high with Enable Protected Mode on** for Internet and **Medium-low with Enable Protected Mode off** for Local intranet.

   These are the minimum settings, security may be increased if desired.

2. Trusted Source – Only enter URLs which are from a secure and trusted source for the widget. Adding links to unverified sources or untrusted websites will put your Point-of-Sale at risk.

Engagement configuration prerequisites

This article reviews the required EMC configuration steps to enable users, devices, and functions for the Engagement feature.

Contents

- 1 Configuring EMC modules
  - 1.1 Enterprise Parameters
  - 1.2 Employee Maintenance
  - 1.3 Page Design
  - 1.4 Workstations
- 2 See also

This article contains a **best practices** section.

This article relates to programming of an EMC module.

This article discusses functionality that relates to **Simphony v2.x**.

This feature or functionality was introduced in Simphony 2.7.

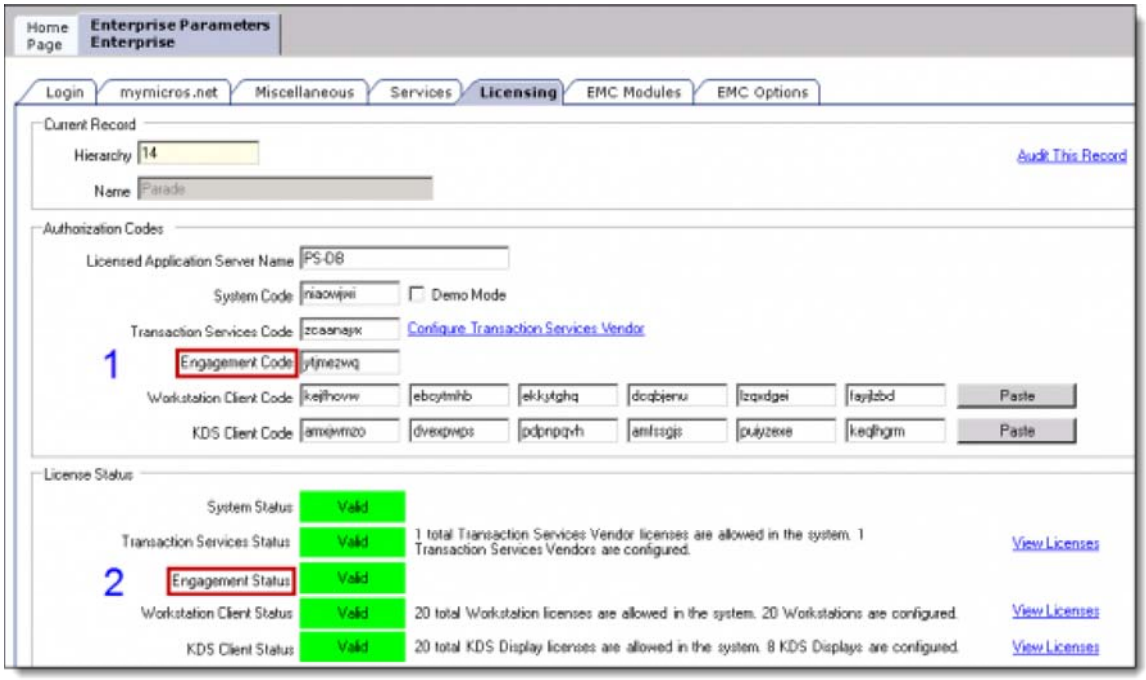
This article discusses **configuration**, or various programming scenarios, or both.

You must configure several EMC modules before users can log in to the Engagement configuration website.

Configuring EMC modules

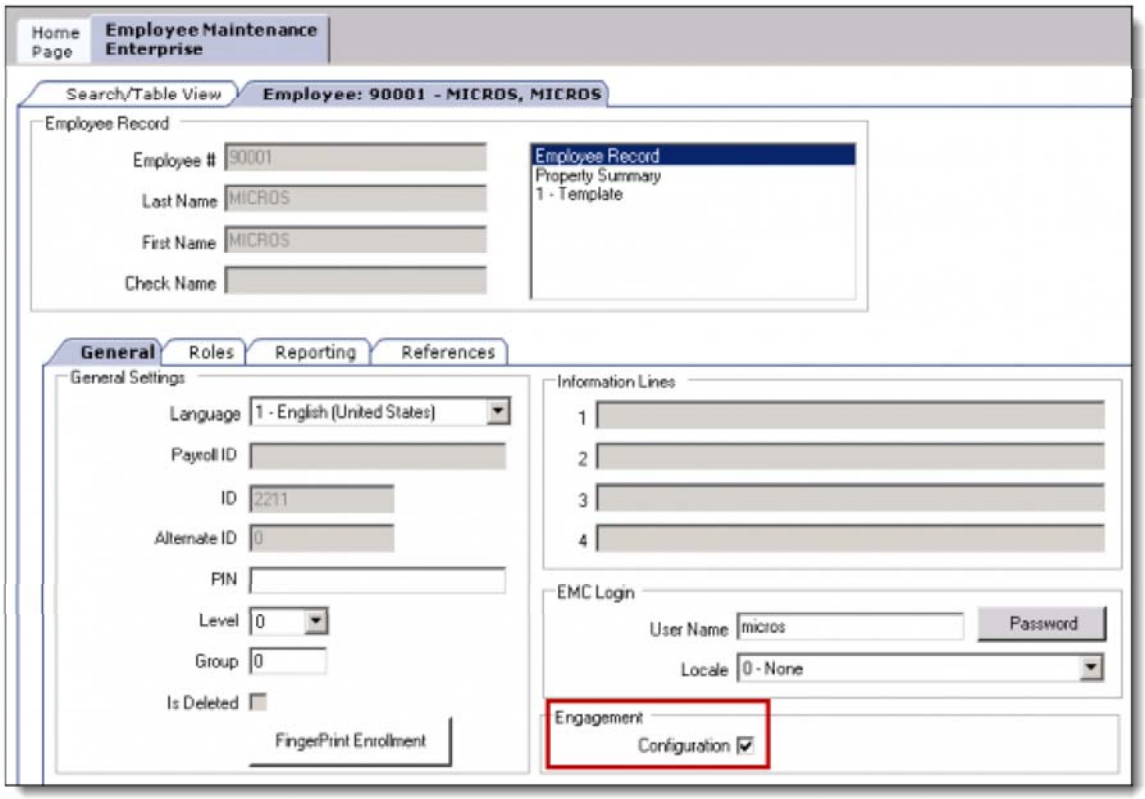
Enterprise Parameters

1. Navigate to the *EMC | Enterprise Parameters module | Licensing tab | Authorization Codes section | **Engagement Code***.
2. Enter the Engagement authorization license code.
3. Click **Save**.
4. Verify that the *License Status | **Engagement Status*** is valid.



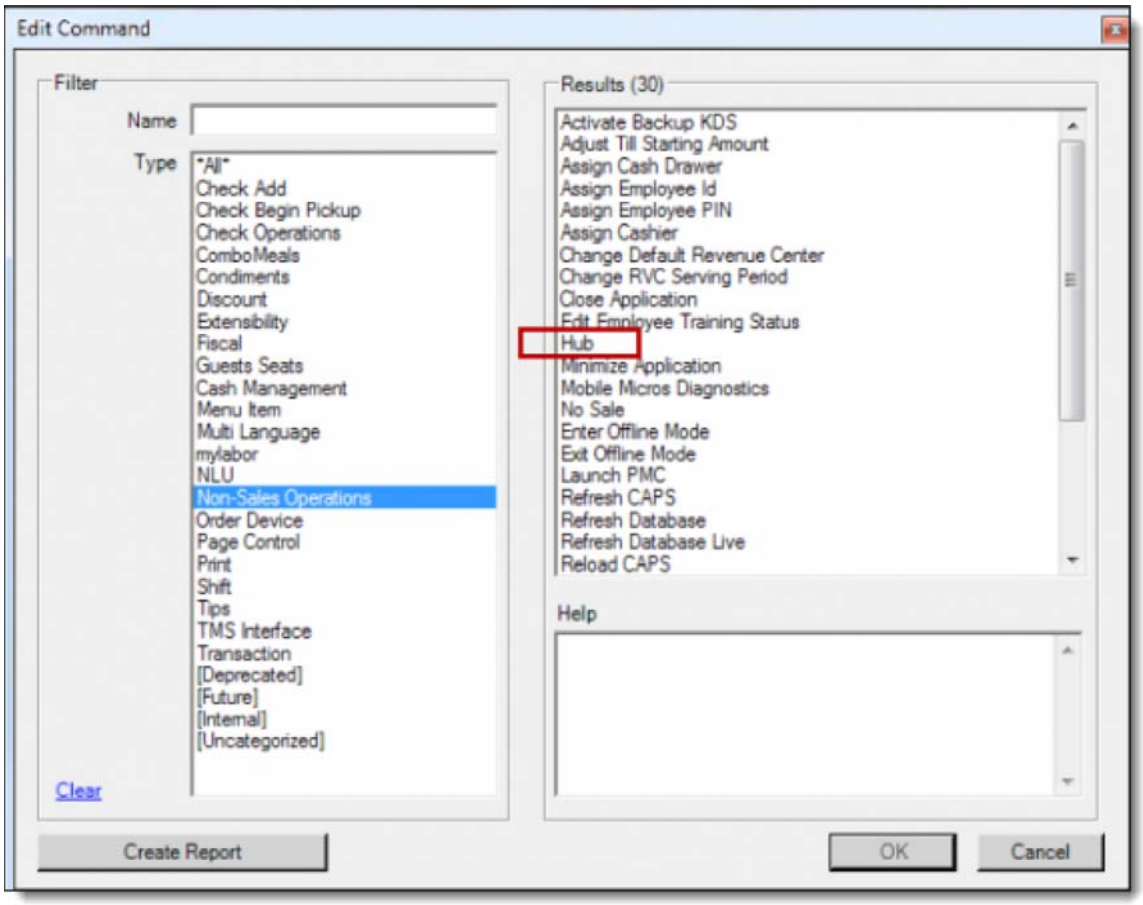
Employee Maintenance

1. Navigate to the *EMC | Enterprise level | Personnel | Employee Maintenance | General tab | Engagement section*.
2. Select the **Configuration** *checkbox.*
3. Assign Engagement configuration privileges to each designated employee. *If you do not select the Configuration checkbox, the employee that registers for Engagement has this option automatically selected by the system after registration is completed.*
4. Click **Save**.



Page Design

1. Navigate to the *EMC | Property level | Configuration tab | User Interface | **Page Design module***.
2. Assign the **[Hub]** function to a button on a touchscreen of your choice.
3. Click **Save**.

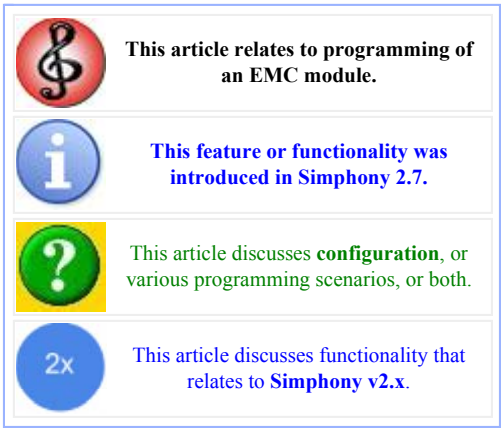


Workstations

1. Navigate to the *EMC* | *Property level* | *Setup tab* | *Hardware/Interfaces* | *Workstations* | *Options tab* | *Offline/Misc tab* | ***Miscellaneous Options*** section.
2. Enable the **[58 – Enable Engagement]** option for every workstation that needs to run the Engagement feature.
3. Click **Save**.

Creating pages for the Engagement Feature

This article reviews the process for creating pages for the Engagement feature.

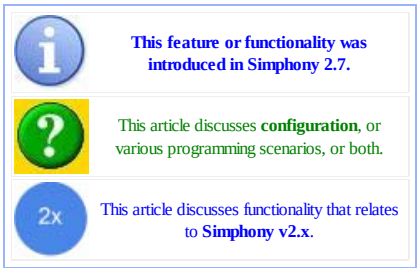


From the *Dashboard* | ***Pages*** section, select **View All**.

1. To add a new Welcome Page, from the *Pages* | ***Welcome Pages*** section, select **+ Create New Page**.
2. To add a new Hub Page, from the *Pages* | ***Hub Pages*** section, select **+ Create New Page**.
3. Type the name of the page in the text box.
4. Click **Ok**.

Creating relationships between pages, employees, and workstations (tagging) for the Engagement feature

This article reviews the creation and assigning of tags on pages, employees, and workstations when running the Engagement feature.



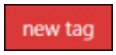
You can assign pages to employees, and/or workstations. This is also known as tagging. Tagging helps keep pages organized by identifying which property, employee, and/or workstation to which pages are assigned. For example, if My Bar assigns all of their pages a **BAR** tag, you can search for all pages tagged as **BAR**. There can be multiple tags assigned to a page, but you can only assign one tag to a workstation and one tag to an employee. A page that has been set as a default page cannot be tagged. The system assigns new employees the default Hub page and any new workstations show the default Welcome page without any tagging.

The color of the tag indicates the state of a tag.

- When a new tag is added and assigned it appears like this:

- When a tag added but unassigned to a page, it appears like this:

- When a tag is deleted, it appears like this:

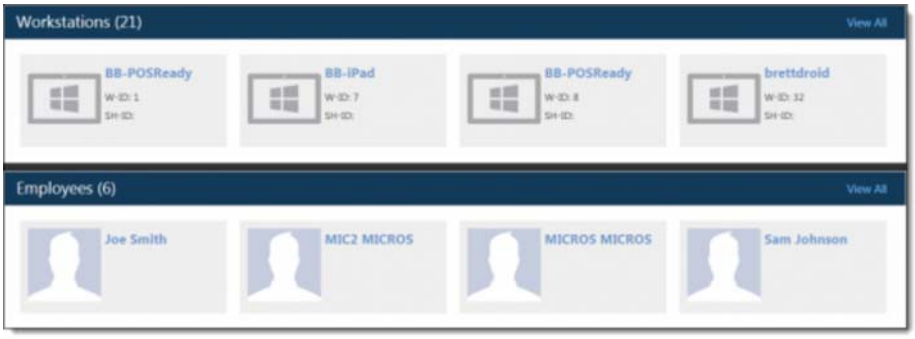


This example shows workstations and employees from the Enterprise as they appear on the Engagement Dashboard. Each employee and workstation appears by default in the Engagement configurator through the synchronization process. If you want to see the most recent employee and workstation additions to the system, click **Sync**.

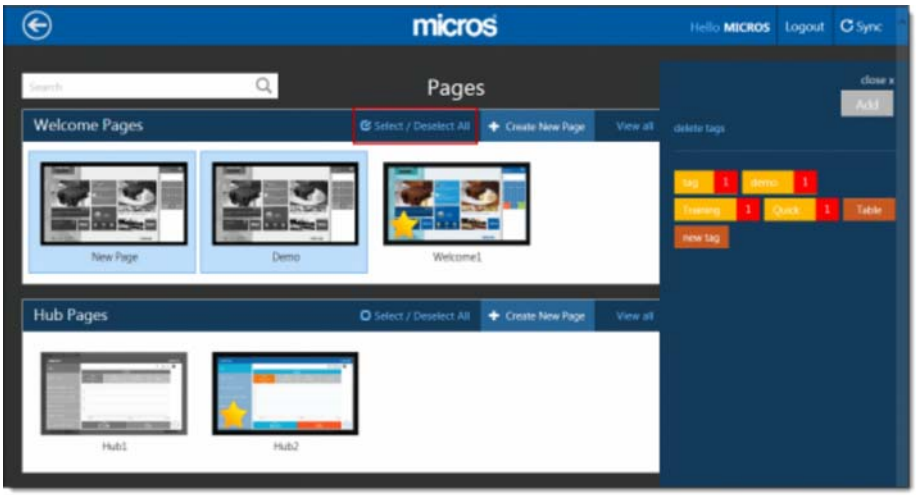
The workstation tiles show the following information that can be found in the *EMC* | ***Workstation*** module:

- W-ID: = The workstation ID
- SH-ID: = The workstation Service Host ID (if the device is configured as a Service Host).

The Employee tiles show the employee's names as entered in the *EMC* | ***Employee Maintenance*** module.



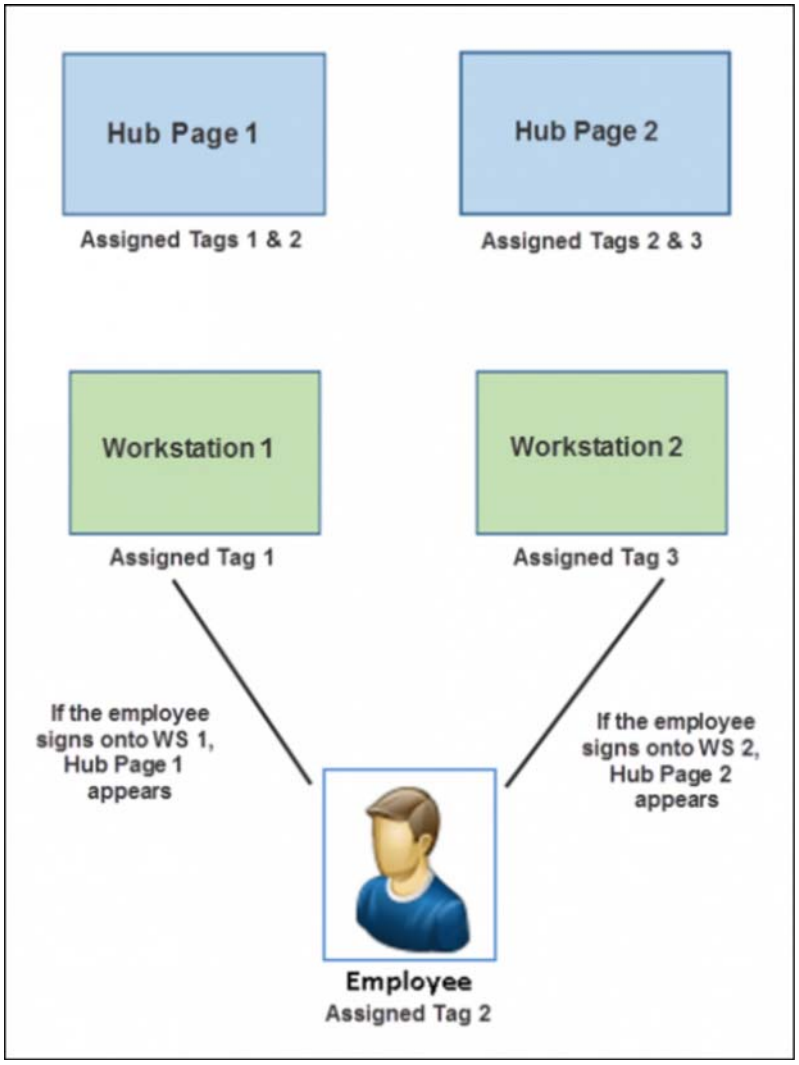
If you want to see the tags and the pages to which they are assigned, click the **Select / Deselect All** checkbox and the pages are highlighted. For each assigned tag, a red box shows the number of pages that currently have that tag assigned. This is an example of the Welcome pages tags.



There is a basic logic that is applied within the tagging system. Depending on which workstation an employee signs onto, the system takes into account the employee tag number as well as the workstation tag number and displays the appropriate Hub page that closest meets the tagging criteria.

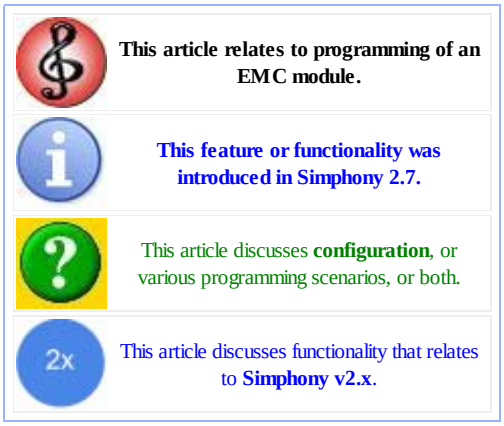
In the example, if the employee signs onto WS 1, then Hub Page 1 appears. This is because the employee has been assigned tag 2, WS 1 has been assigned tag 1, and Hub Page 1 has been assigned tag numbers 1 and 2. The system has the page appear that is closest to meeting the tagging criteria (assigned tags 1 and 2).

If the employee signs onto WS 2, then Hub Page 2 appears. This is because the employee has been assigned tag 2, WS 2 has been assigned tag 3, and Hub Page 2 has been assigned tags 2 and 3.


Hub Page 1
Assigned Tags 1 & 2
Hub Page 2
Assigned Tags 2 & 3
Workstation 1
Assigned Tag 1
Workstation 2
Assigned Tag 3
If the employee signs onto WS 1, Hub Page 1 appears
If the employee signs onto WS 2, Hub Page 2 appears
Employee
Assigned Tag 2

Creating, assigning and deleting tags (tagging) for the Engagement feature

This article reviews the steps to create, assign, and delete tags on pages for the Engagement feature.



To create a tag and assign it to a page:

1. Click the page(s) and then click **Tags**. You can select and add a tag to multiple pages at the same time.
2. Click **Add**.
3. Enter a name for the new tag, and click **Done**. The new tag is automatically assigned to the selected page(s).
4. To assign an existing tag, click the page(s) and click the tag name.

Deleting a tag removes it from all of the pages to which it was assigned. To delete a tag:

1. Click **Tags** and select **delete tags**.
2. Click the tag you want deleted.
3. Click **Delete** and confirm the deletion.

Engagement Feature

This article reviews setup of the Engagement feature. Click the links in this article to see additional topics.

Contents

- 1 What is the Engagement experience?
  - 1.1 Engagement configuration prerequisites
  - 1.2 How-to
  - 1.3 What are widgets and tagging?
  - 1.4 FAQ
- 2 See also

This article contains a **best practices** section.

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony 2.7.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses functionality that relates to **Simphony v2.x**.

What is the Engagement experience?

The Engagement experience lets you:

- Create customized pages online
- Assign (or tag) pages to properties, employees or workstations, or both
- Run POS operations and execute Manager Procedures

There are two types of pages:

- Welcome Pages – Initial page that appears on the mTablet E Series device. You can assign different Welcome pages to workstations.
- Hub Pages – Pages that appear on the tablet after signing in on the Ops client and pressing the Hub function key. You can assign different Hub pages to each employee.

Pages can contain widgets that allow you to enhance workstation functionality. For example, you can have Daily Specials, image slideshows, a Twitter feed, and mymicros.net reports appear on the tablet's touchscreen.

Engagement configuration prerequisites

- Engagement configuration prerequisites
- Setting File Management permissions for the Engagement feature

How-to

- Enable multiple languages
- Register and log in on the Engagement feature

- Create pages
- Publish, unpublish and republish pages
- Modify pages
- Assign logos and colors to pages
- Add and move widgets
- Configure widgets
- Create, assign, and delete tags (tagging)
- Add POS command buttons
- Use the Engagement auditing tool
- Retrieve your Engagement Organization ID
- View the maximum data limit for your hosted Engagement server

What are widgets and tagging?

- List of widgets
- Creating relationships between pages, employees, and workstations (tagging)

FAQ

- FAQ for the Engagement feature

See also

Engagement Best Practices
(http://downloads.micros.com/micros/simphony/Wiki/Docs/WhitePapers/Engagement_Best_Practices.pdf)

How to assign logos and colors to pages for the Engagement feature

This article reviews the steps to take to assign logos and colors to pages for the Engagement feature.

This article relates to programming of an EMC module.

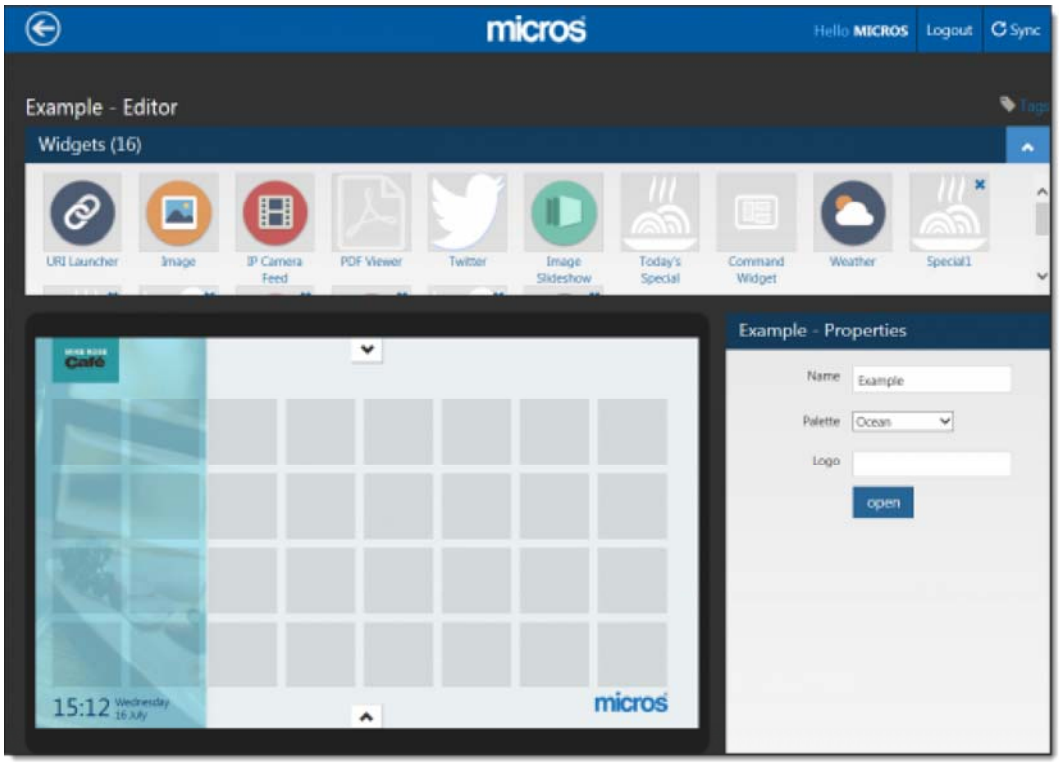
This feature or functionality was introduced in Simphony 2.7.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses functionality that relates to **Simphony v2.x**.

You can define a logo and color palette on Welcome pages. You can only add a logo to Hub pages because the color palette can inherited from the Enterprise, Property, or Revenue Center (RVC) level based on the Theme Assignment module configuration.

1. Open the page and click anywhere on the grid.
2. Select the desired color from the Palette drop-down box.
3. Click **Open** to add a company logo to the page.
4. Navigate to (using Windows Explorer) and select the logo image file. The navigational path appears in the Logo text box. Supported image formats throughout the Engagement feature are: BMP, JPEG, PNG, and GIF files. Image files must not exceed 1 MB in size.
5. Click **Save**.



How to configure language translation for Engagement

This article reviews the configuration needed for the translation of languages for the Engagement feature.

Contents

- 1 How to add a new language to HUB/Welcome pages
- 2 How to add a new language file to WebEMC
- 3 How to add a new language file to Engagement Configuration application server
- 4 See also

This article relates to programming of an EMC module.

This article discusses functionality that relates to **Simphony v2.x**.

This feature or functionality was introduced in Simphony 2.7 Maintenance Release 4.

This article discusses **configuration**, or various programming scenarios, or both.

How to add a new language to HUB/Welcome pages

1. Navigate to the Engagement Language File directory on the Simphony application server. The default installation path is: *<Drive letter>:\Micros\Simphony\WebServer\Engagement\LanguageFile\Resources.xml*
2. Make a copy of the **Resources.xml** file.
3. Rename it to Resource.CULTURE-CODE.xml; where the CULTURE-CODE is the code of the new language that you are adding. For example, Resources.fr-FR.xml for French or Resources.es-ES.xml for Spanish.
4. Edit the values of the **<string>** elements of each language entry to the target language. Do not change the values of other elements or attributes. You can move the number parameter(s), (**{0}** or **{1}**) in the language string (left or right of the string text), however do not completely remove or delete them.

Related article: How to enable multi-languages for the Engagement feature

How to add a new language file to WebEMC

1. Navigate to the Engagement LanguageFile folder in the Simphony application server. The default installation path is: *<Drive letter>:\Micros\Simphony2\EGatewayService\CAL\Win32 \Package\ServiceHost2.0\WebServer45\Engagement\LanguageFiles*
2. Make a copy of the **EMCWebLanguageStringsEN-US.xml** file.
3. Rename it to EMCWebLanguageStringsCULTURE-CODE.xml; where the CULTURE-CODE is the code of the new language that you are adding. The file names must include the correct CULTURE-CODE naming convention. For example, EMCWebLanguageStringsfr-FR.xml for French and EMCWebLanguageStringses-ES.xml for Spanish.

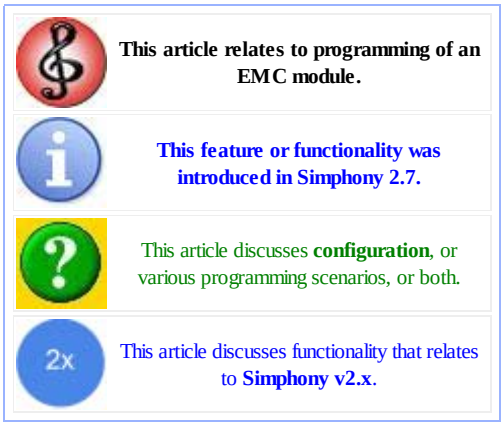
4. Change the values of the **Text** language attribute for each entry to the target language. Do not change the values of the **key** or **screen** attributes. You can move the number parameter(s), (**{0}** or **{1}**) in the language string (left or right of the string text), however do not completely remove or delete them.

How to add a new language file to Engagement Configuration application server

1. Navigate to the Engagement LanguageFile folder in the Engagement Configuration (Config) application server. The default installation path is: *<Drive letter>:\Web Root\Languages*
2. Make a copy of the *en-US.xml* file.
3. Rename it to CULTURE-CODE.xml; where the CULTURE-CODE is the code of the new language that you are adding. For example fr-FR.xml for French or es-ES.xml for Spanish.
4. Change the values of the **Text** attribute of each language entry to the target language. Do not change the values of the **record key** attribute. You can move the number parameter(s), (**{0}** or **{1}**) in the language string (left or right of the string text), however do not completely remove or delete them.
5. Change the values of the name and the code attributes on the second line to the Culture code of the target language (<Language version="32" name="English (US)" code="en-US">).

How to configure widgets for the Engagement feature

This article reviews how to configure widgets for the Engagement feature.



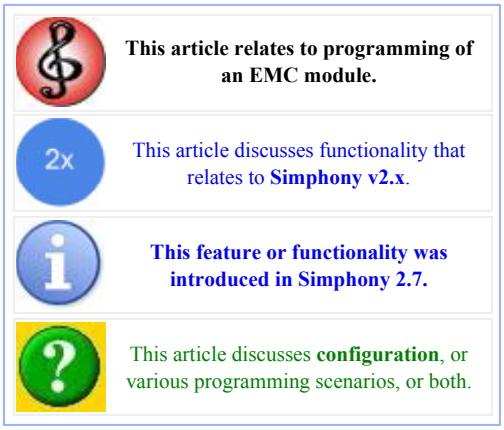
1. Add the widget to the page.
2. Type in the Primary Text field. The text appears on the top of the tile.
3. Type in the Secondary Text field. This text appears beneath the Primary text in smaller font.
4. Select a size for the tile from the Size drop-down box:
    - Small = one tile (small square)
    - Wide = two tiles, (rectangle)
    - Large = 4 tiles (square)
    - Extra Large = 9 tiles (large square)
5. Click **open** to add a Tile Image to serve as the tile's background image. To add an image to a tile:
    a. Ensure that the image or graphics file is available on your machine or network.
    b. Click **Upload images(s)** and navigate to the location of the image file or type the images location URL and click **Ok**.
    c. If an image has previously been uploaded, click View Album Contents and select the desired image.
6. Click **Select** to save an existing image or **Crop** to modify the image, and click **Done**.
7. Refer to the following table for the next steps particular to the widget being added to the page.

Widget	Next Steps
URL Widget	1. Type the URL for the website of choice. 2. If you want to enable a keyboard icon to be displayed on the tile's top toolbar, select the Show Keyboard checkbox. This enables the ability for someone to click the keyboard icon to have the tablet keyboard appear on the tile.

8. Click **Save**.
9. Click **Publish** for new pages or **Republish** for existing pages.

How to enable multi-languages for the Engagement feature

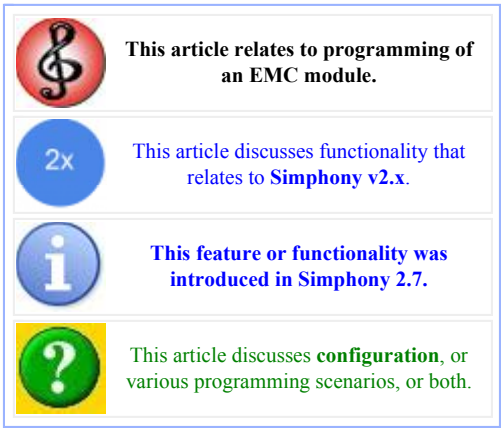
This article reviews the setup of multi-languages for the Engagement feature.



1. In the EMC, select Enterprise, select Setup, select Languages, and then select **Miscellaneous**.
2. For each language record, enter the IETF abbreviated language code in the Language Culture text box. For example, the correct code for English - United States is en-US. See http://msdn.microsoft.com/en-us/library/ee825488(v=cs.20) for a list of language codes.
3. Click **Save**.

How to modify pages for the Engagement feature

This article reviews the steps to modify pages for the Engagement feature.

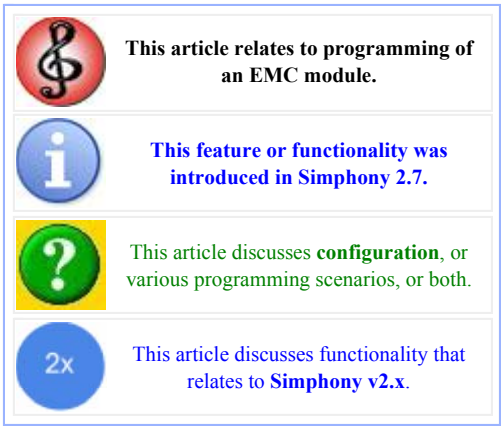


Existing pages can be modified using the controls that appear when a page is selected.

- Click a page and select **Edit** to make desired changes to the page.
- Click a page and select **Clone** to duplicate an existing page.
- Click a page and select **Default** to set that page as the default. Default pages have a star shaped icon. When users sign onto the workstation, they see this page if no tags are assigned. Default Welcome pages can be assigned to workstations. Default Hub pages can be assigned to employees.
- Click a page and select **Tag** to assign or add a tag to a page.

How to Publish, Unpublish and Republish pages for the Engagement feature

This article reviews the page publishing process for the Engagement feature.



Pages need to be published to enable users to view and access non-default pages.

- Click **Publish** to save and to push the page down to the POS clients. Only one page can be published if no pages are tagged. When you publish an untagged page, it unpublishes the previous default page and the newly published page becomes the default page.

- Click **Unpublish** to deactivate currently published Pages.
- Click **Republish** to publish Pages that were previously published. Clicking **Republish** automatically pushes the page down to the POS clients.

Published pages appear in color and non-published pages are gray

Related topics

- Creating relationships between pages, employees, and workstations (tagging)
- Creating, assigning and deleting tags (tagging)

How to retrieve your Engagement Organization ID

If you forgot your Engagement Organization ID perform the following steps from the MICROS Login screen:

1. Click **Forgot my ID**.
2. Enter your site's Gateway URL. **Examples:** http://<ServerName>:8080 or http://<Server IP address>:8080
3. Enter your Simphony EMC user name.
4. Enter your Simphony EMC password.
5. Click **Recover Org Id**.
6. Your Engagement Organization ID appears.
7. Click **Back to Login** to enter your Login credentials again.

How to use the Engagement Auditing tool

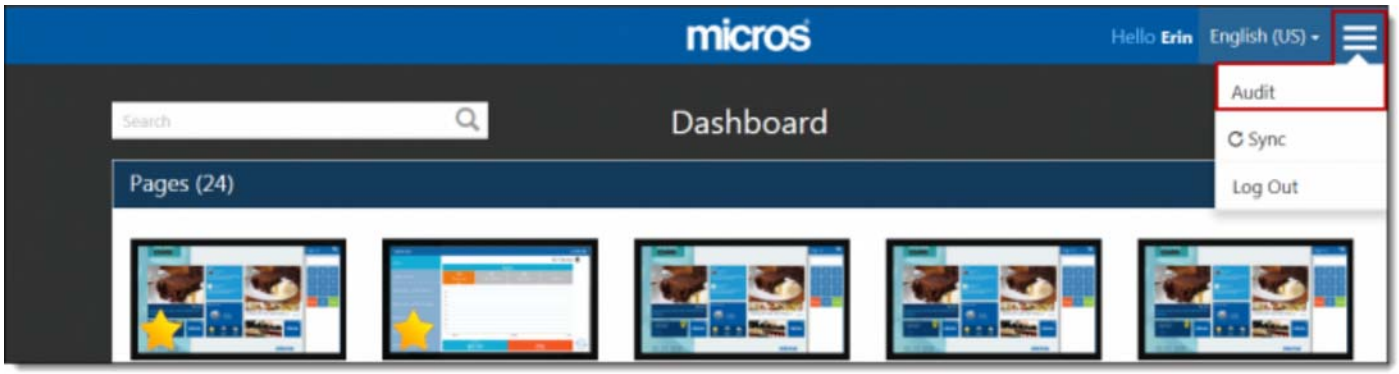
This article reviews the use of the Engagement Auditing tool.

2x This article discusses functionality that relates to **Simphony v2.x**.

Overview

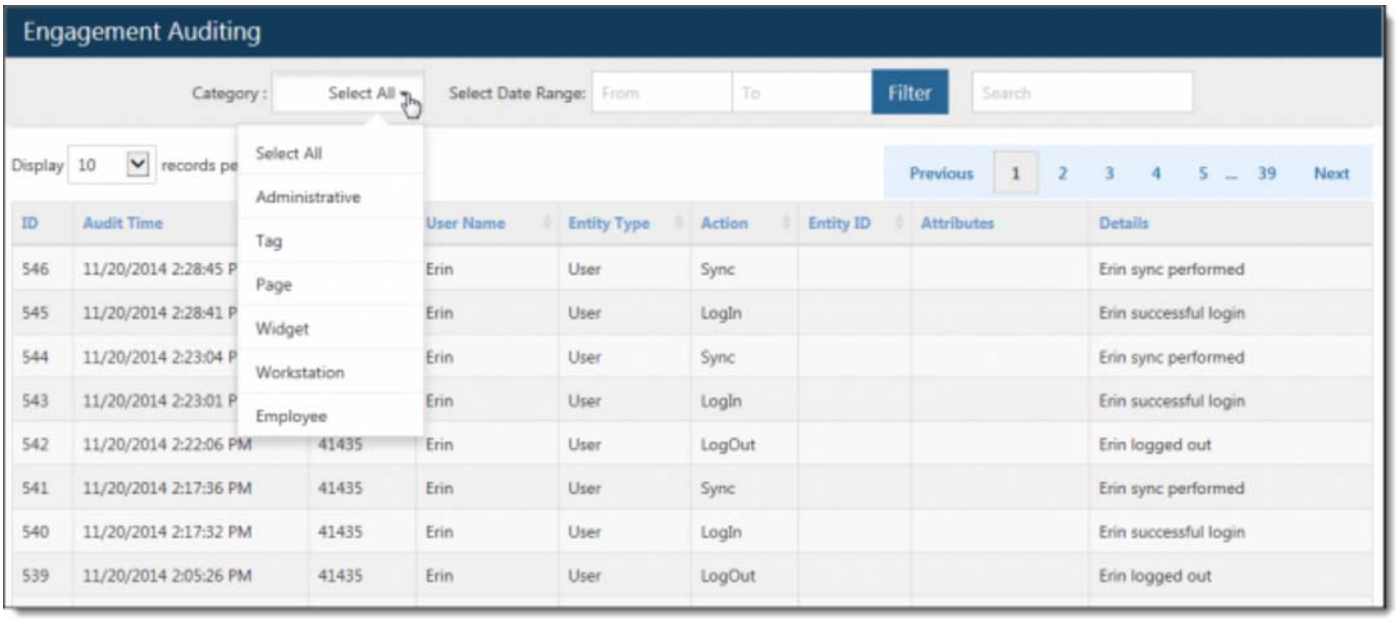
You can now track and search a variety of operations after accessing and using the Engagement configurator. The auditing tool tracks and provides the date and time, user ID, user name, actions that were performed, and additional details about each operation.

Usage



1. Click **Menu bars** and then click **Audit** to access the Engagement Auditing tool.

2. Filter your search by selecting a **Category**, **Date Range** or entering a keyword in the **Search** text box and then click **Filter**.



The Engagement Auditing tool provides information about the operations listed here beneath their assigned categories:

Administrative (User)

- Successful or failed logins
- Logging out of the configurator
- When a sync is performed

Tag

- Adding or deleting a tag name
- Adding or deleting a tag name to page(s)

Page

- Creating, deleting or cloning a page
- Changing the theme of a page
- Assigning, removing or cropping a logo on a page

Widget

- Adding or removing a widget on a page
- Saving a widget's template name
- Changing the size of a widget (both the previous and new size)
- Changing the widget name (both the previous and new name)
- Uploading, cropping or deleting a widget background image

Workstation

- Adding or removing a tag name to Engagement workstation(s)

Employee

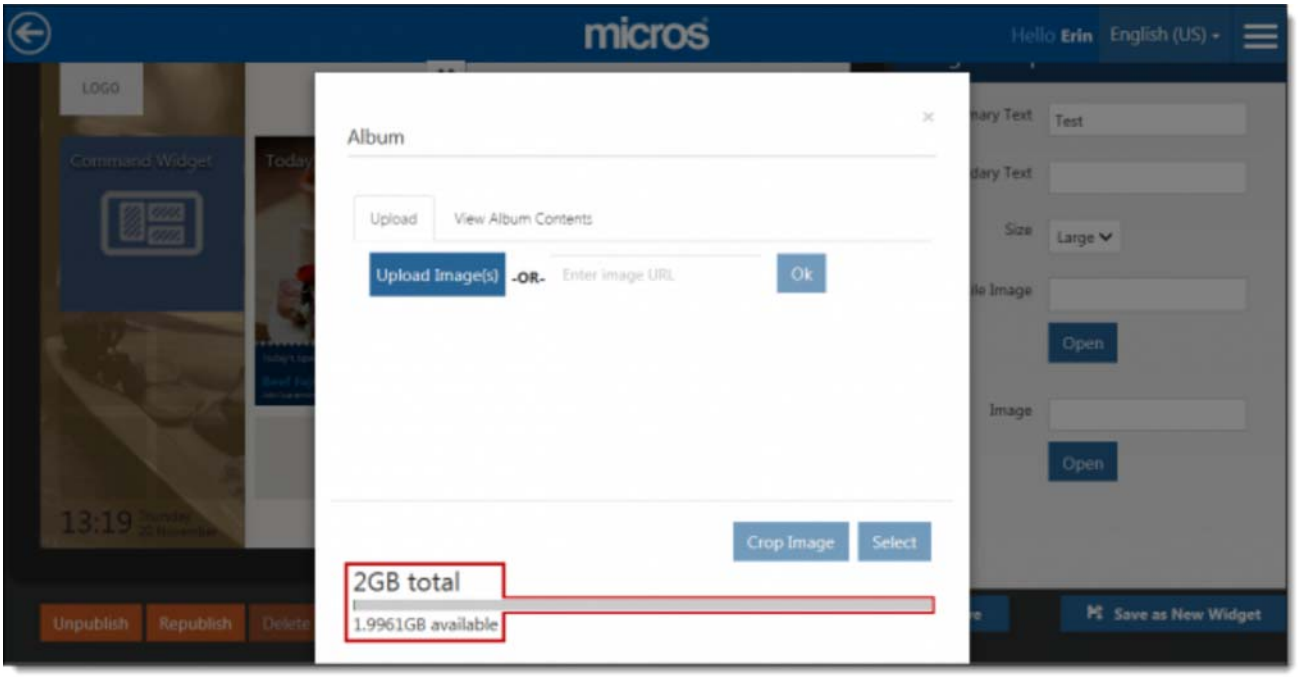
- Adding or removing a tag name to Engagement privileged employee(s)

How to view the Max data limit for your hosted Engagement server

2x This article discusses functionality that relates to **Simphony v2.x**.

Engagement widget image data limit

You can view the maximum allowable amount and remaining space for uploading widget images to your hosted Engagement server. When adding images for widgets, the data limit (2GB total) displays on the image upload screen (shown here) as well as the remaining amount of available space for adding more image content.



List of widgets for the Engagement feature

This article provides a list of the Widgets and their functions that are available for the Engagement feature.

This feature or functionality was introduced in Simphony 2.7.

2x This article discusses functionality that relates to **Simphony v2.x**.

You can add the following widgets to a Hub page. Welcome pages do not support Hub Page widgets.

Widgets for Welcome and Home Pages	Description
URL Launcher	Allows you assign an image and a web address (or URL) to a tile. When you select this tile on the POS client, it takes you to the web site.
Image	Allows you to assign an image or picture to a tile. When you select this tile on the POS client, the image appears larger and shows more detail.
IP Camera Feed	Allows you to directly assign an IP Camera feed to a tile. When you select this tile on the POS client, the camera feed screen increases in size. You do not need to assign an image to the tile. There is a maximum of three cameras that can be connected. See the Engagement IP Camera widget article for more detailed information.
PDF Viewer	Allows you to assign a PDF document to a tile. When you select this tile on the POS client, the PDF document opens. You must have a PDF

	viewer application installed on the device prior to utilizing this widget.
Twitter	Allows you to assign a Twitter feed to a tile. When you select this tile on the POS client, the Twitter feed increases in size.
Image Slideshow	Allows you to assign multiple images that rotate for viewing at five second intervals.
Today's Special	Allows you to assign one or more menu items, graphics, descriptions, and prices to a tile. When more than one menu item is configured, the items rotate for viewing at five second intervals. You can assign a time range to this widget so that different specials cycle based on the times they are being served.
Command Widget	Allows you to assign procedures, functions, and Ops commands to a tile. The available commands are: ▪ Clock In ▪ Clock Out ▪ Update Database ▪ Close Application ▪ Employee Training ▪ Redirect Order Device ▪ Edit Menu Item ▪ Menu Item Availability ▪ Minimize Application ▪ Sign In RVC Prompt
Weather	Allows you to assign a weather forecast provider and location to a tile. In order for this

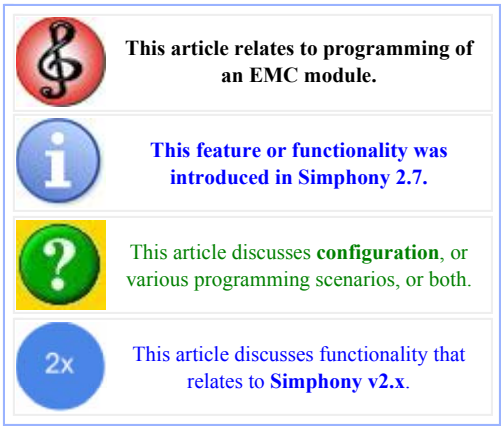
	widget to work, you must have purchased an API key.

Widgets for Hub Pages only	Description
inMotion Charts	Allows you to assign mymicros.net reports to a tile. When you select this tile on the POS client, it generates the assigned report first, but all of the other reports are also accessible. Select each report to view more detail. The available mymicros.net reports are: ▪ Sales ▪ Labor_Cost ▪ Discount ▪ Sales_Per_Labor_Hour ▪ Check Count ▪ Guest Count ▪ Average_Ticket_Time
inMotion Stores	Allows you to view cumulative Sales Report data from all of the available outlets, or you can select an individual store from a list that appears when this tile is selected.
Labor Cost	Allows you to view potential employee overtime labor cost. When you select this tile, alerts inform the supervisor about employees approaching overtime for a particular pay cycle.
WCC (Web Configuration Console)	Allows to you to assign one of following available manager procedures to a tile. ▪ Edit Header/Trailer ▪ Bulk Edit MI Prices ▪ Copy Menu Item

WCC	

Registration and logging in on the Engagement feature

This article reviews the Registration and log in process for the Engagement feature.



Ensure that you have administrative level access credentials for the Simphony EMC and Simphony Reports. Your access permissions must be to all Locations, Workstations, and Employees in the organization.

1. Open a browser and enter the Engagement website https://www.cloudmicros.com.
2. If you are a new user, click **Register**. If you are an existing user, continue to the next step.
3. Enter the same connection settings (Simphony Server's IP address) and logon credentials you would use for accessing the Simphony EMC.
4. Select the default organization language.
5. Enter the same connection settings and logon credentials you would use to logon to mymicros.net.
6. Enter an email address where you want to receive registration confirmation information.

Setting File Management permissions for the Engagement feature

This article reviews the steps for setting file management and access privileges on the Simphony v2.x server for the Engagement feature.

In some installations, the internal Microsoft Windows user that runs the Engagement web services on a Simphony v2.x application server does not have sufficient permission to create and manage files (such as logs) within the folder where the software is installed.

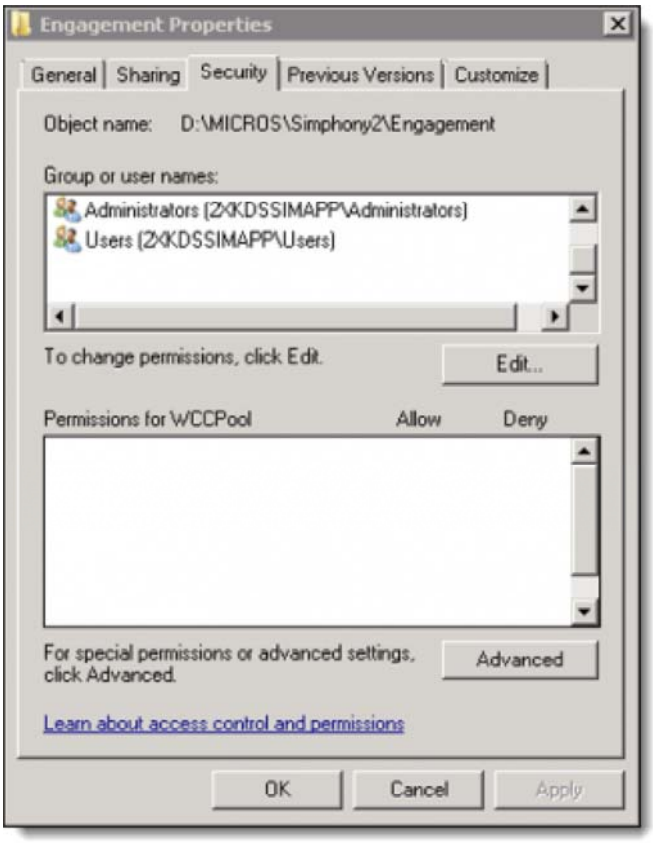
A batch file has been supplied here for you to run after installation that will enable the appropriate permissions.

Click here to download the **EngagementFolderPerm.bat** batch file. Download (http://downloads.micros.com/micros/simphony/Wiki/Docs/WhitePapers/EngagementFolderPerm.bat)

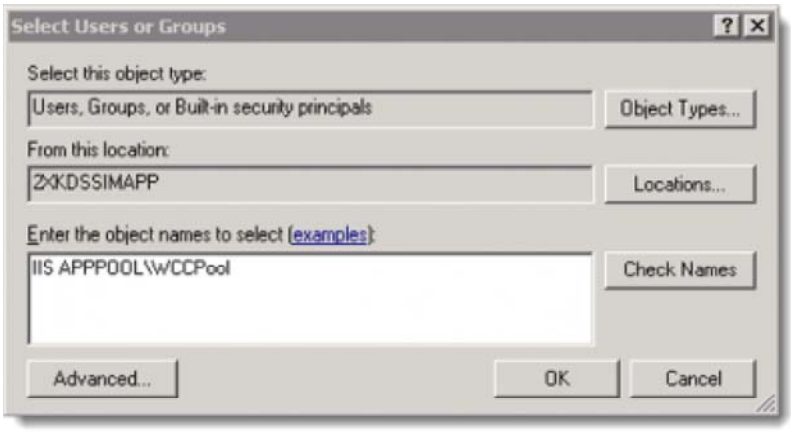
Rather than running the script, a user can manually set the permissions by following these steps:

1. Navigate to the web root folder of the EGateway application using Windows Explorer (for example, *D:\MICROS**Simphony2***).
2. Locate the Engagement sub folder underneath the EGateway web root (for example, *D:\MICROS\Simphony2**Engagement***).
3. Right-click on the Engagement folder and select Properties, and then select the Security tab.

4. Click **Edit**.
5. Click **Add**.

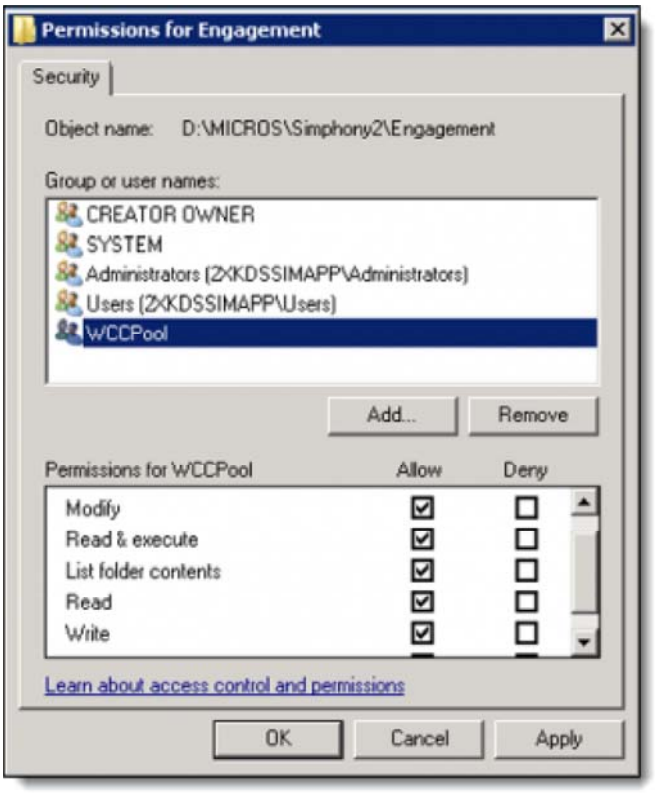


6. Enter **IIS APPPOOL\WCCPool**.
7. Click **OK**.

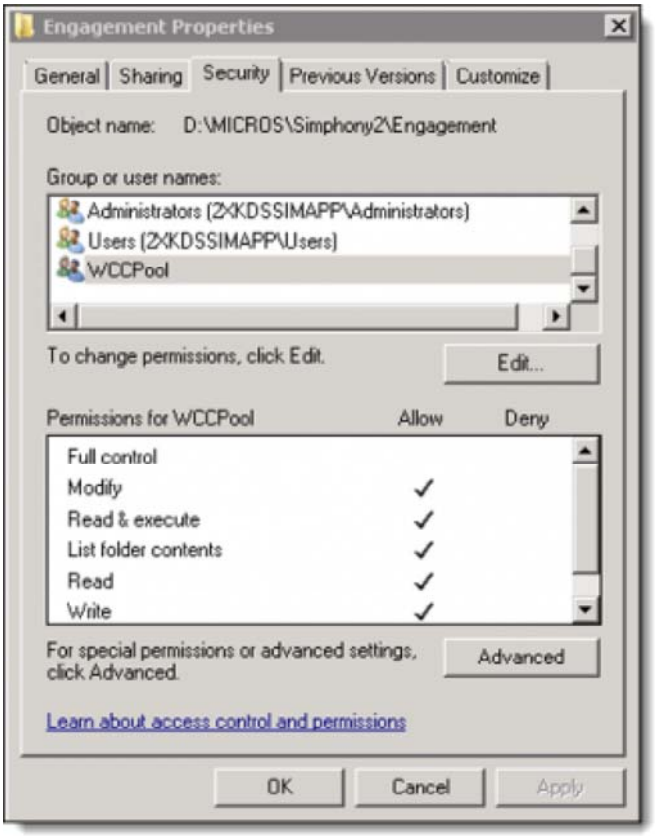


8. Select **WCCPool** and grant the following permissions to the user.

- Modify
- Read & execute
- List folder contents
- Read
- Write



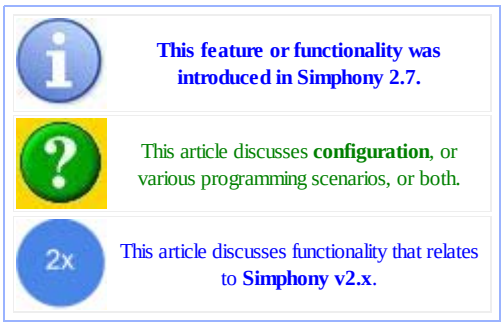
9. Verify that the **WCCPool** user has been granted the above permissions.
10. Click **OK**.



11. Open a Command prompt window and enter **iisreset**.
12. Wait for IIS to successfully reset.

FAQ for the Engagement feature

This page lists FAQ for the Engagement feature.



FAQ

1. What do I enter to connect my Simphony system when registering?
    - You should enter the path and port to your Simphony v2.x site. Example: http://[SIMPHONYAPPSERVER:8080/]. You will need your EMC logon credentials as well.
2. How much content can I upload to the Engagement Site?
    - The base Engagement license includes up to 2GB of content storage.
3. What is the maximum image size?
    - An individual image cannot be more than 1MB.
4. Why do I need a public facing IP or Hostname to register for Engagement?
    - The Engagement feature is hosted in the cloud. For it to connect with your Simphony system it needs to access your Simphony environment.
5. Where can I find configuration information?
    - Configuration information can be found on the Simphony WIKI located here:http://wiki.micros.com/wiki/index.php?title=Main_Page
6. What file types can I upload?
    - You can upload .bmp, .png, .gif, and .jpeg files.
7. How many Widgets can I add to a Page?
    - There is no restriction on number of Widgets but rather available space to place Widgets. A user may add as many Widgets as they wish until all available space is utilized.

8. What is a Tag?

- A Tag is a way of associating Pages to either Workstations or Employees. Generally, a Welcome Page will be tagged to associate it with Workstations and a Hub Page will be tagged to associate with Employees.

9. Can I have a specific Page for each RVC or Property?

- Yes, by using tagging you can associate Pages down to the specific Workstation or Employee if preferred.

10. How many Pages can I create?

- There is no limit to the number of Pages you can create.

11. How many Tags can I create?

- There is no limit on the number of Tags you can have in an organization. Pages can have multiple Tags. Employees and Workstations can only have one Tag.

12. What is the difference between a Welcome and Hub Page?

- A Welcome Page replaces your sign-in screen and does not require credentials. A Hub Page is only available within POS and uses the Employees POS credentials

13. Why is my Welcome Page not loading?

- Verify your Internet connection. If your connection is good then verify your connectivity from the Workstation to [1] (https://www.cloudmicros.com) . If you are able to connect to the site but not load your Welcome Page then further troubleshooting may need to take place.

14. Why is my Hub Page not loading?

- Verify your Internet connection. If your connection is good then verify your connectivity from the Workstation to [2] (https://www.cloudmicros.com) . Verify your connection to the Simphony Enterprise Server. If you are able to connect to both the site and Simphony Enterprise Server but not able to load a Hub Page then further troubleshooting may need to take place.

15. I have forgotten my Engagement Organization ID, how do I locate it?

- Your Engagement Organization ID should match your mymicros.netCompany name unless it was unavailable when you registered. If you have tried your mymicros.net Company name and are still unsuccessful then you can re-register to view your Engagement Organization ID. This will not actually re-register your system but validates connectivity and presents you with your Organization ID.

16. What is a default Page?

- Every Organization has 1 default Welcome Page and 1 default Hub Page. All Employees or Workstations will automatically get these Pages unless tagged for another page.

17. What if my Employee or Workstation has a Tag that does not exist on a Page?

- The Employee or Workstation will get the default Page.

18. How many times do I need to sign-in to inMotion on the Hub Page?

    - The first time you access a Hub Page with reporting data you will be required to enter your credentials.

19. How many times do I need to sign-in to WCC (EMC Credentials) on the Hub Page?

    - WCC credentials are retained as long as you remain signed in to POS. You may use multiple WCC widgets and will only be prompted the first time. Once signed out you will be prompted the next time you sign in and access a WCC tile within the Hub Page.

20. When signing in to Engagement what Credentials do I use?

    - The Engagement feature uses your Enterprise Management Console credentials.

21. Should I have any security concerns with the URL Widget?

    - The URL Widget does have security built in, but following the best practices for Engagement ensures it is secure in a POS environment. By default the Widget will lock the user into the domain of the URL. For example http://www.micros.com would only allow the user to browse throughout the micros.com domain and not external links on the page. If you wish to further lock down the browser, it will follow the same security settings as your Microsoft Internet Explorer browser settings.

22. Why is my IP camera not displaying?

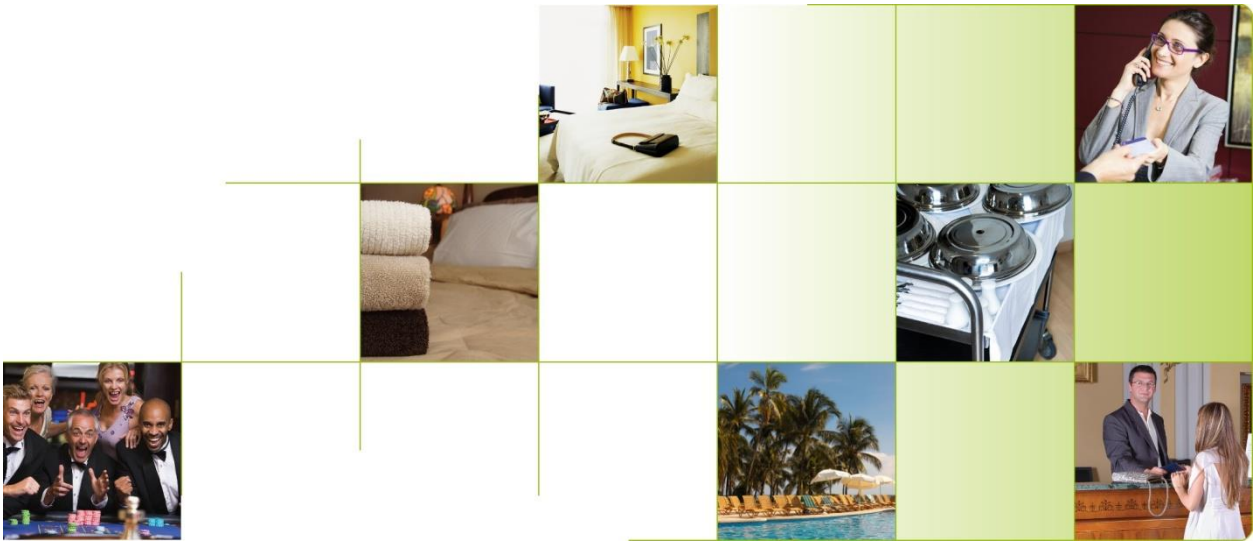
    - Ensure you have assigned your camera a static IP address. Utilizing DHCP will not work should the IP change on your camera. As well, the maximum simultaneous connections is 3, ensure you are not exceeding this threshold.

23. What is the difference between save and publish or republish for Pages?

    - Publishing a Page is deploying it to the Workstations. Republishing a Page will save and deploy any changes/updates to the Workstations. Saving will store any changes/updates you have made to the Page but does not deploy them to the Workstations. This allows the user to modify a Page multiple times before republishing them.

24. I have created a tagged Page and have a matching tagged Workstation but am still getting the default Page, why?

    - Verify you have published the Page.



Simphony Enterprise Cash Management Configuration Guide

ORACLE

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Document Purpose

This guide provides configuration instructions for the Enterprise Cash Management (ECM) module features that are included in Oracle MICROS Simphony v2.7 and higher. All configurations for Enterprise Cash Management functions are set in the Enterprise Management Console (EMC) application in Simphony. Refer to Appendix B: Configuration Levels for a detailed matrix of the areas of Cash Management configuration.

Note that Enterprise Cash Management and Cash Management Lite are two distinct and separate features within Simphony. This document does not provide instructions or information about Cash Management Lite.

Related Links

For more information about using these features in Ops, refer to the *Simphony Enterprise Cash Management User Guide*, available from the MICROS Member website (http://members.micros.com/members/product_support/).

Revision History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Simphony Version
Rev A	August	2014	2.7.0
Rev B	November	2014	2.7.2

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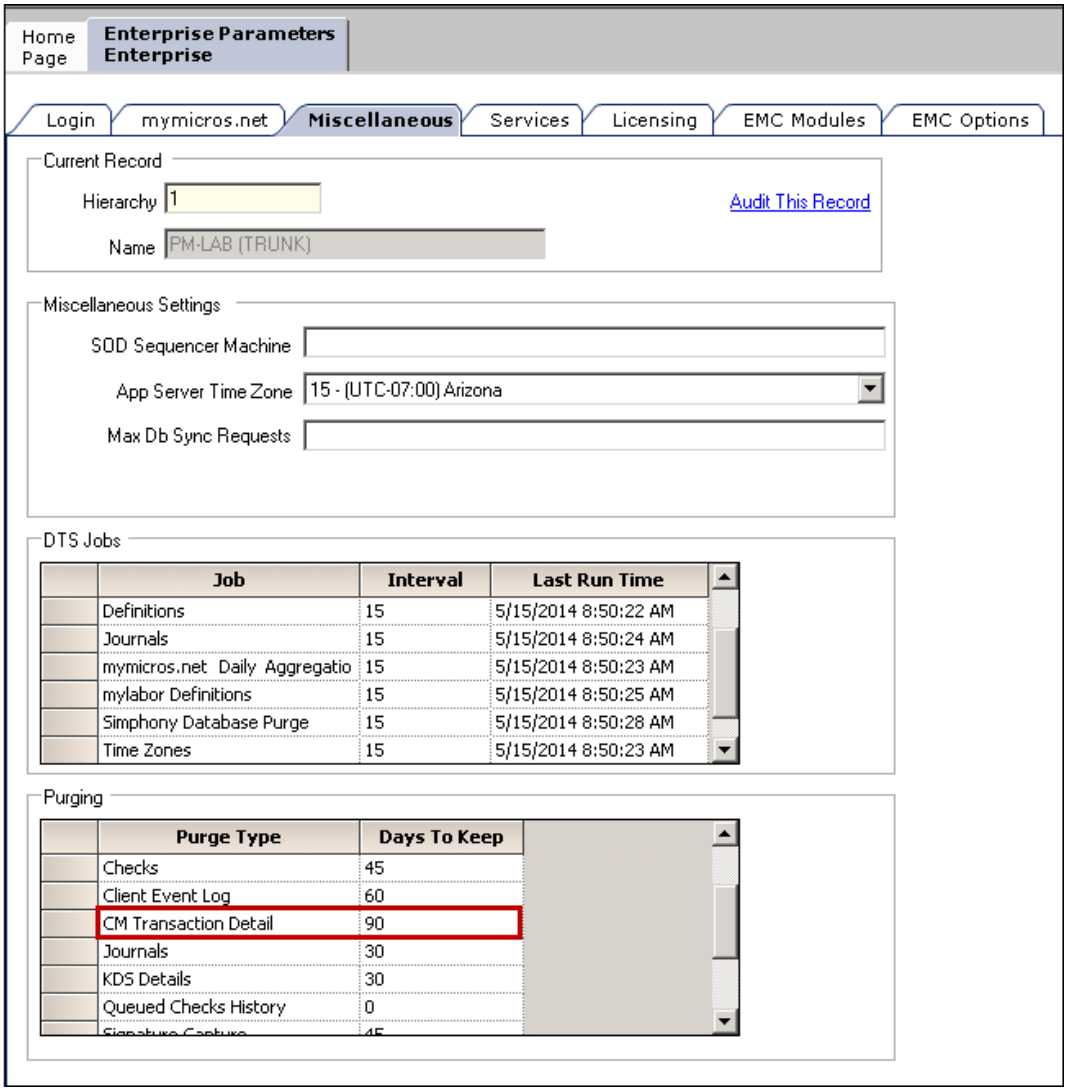
Configure data retention limits

You can set the length of time Cash Management data will be present in the database at the enterprise and property levels.

1. Select *Enterprise level* > *Setup tab* > *Enterprise Parameters* > ***Miscellaneous***.



2. In the Purging section, set the **Days To Keep** for CM Transaction Detail. This is the number of days from the time a transaction has been reported to the enterprise that it will be retained for use in reporting and auditing. The minimum retention is 1 day; the maximum retention is 999 days. After the number of days to keep expires, the Cash Management data is purged during a scheduled event.

Clearing totals

As part of the current data that is cleaned up with the Clear Totals feature, the following Cash Management tables are included:

- CM_RECEPTACLE_DETAIL
- CM_TRANSACTION_DETAIL
- CM_EMPLOYEE_TILL_ASSIGNMENT
- CM_COUNT_DETAIL
- CM_COUNT_DETAIL_CLASSES
- CM_COUNT_DETAIL_ITEMS

Configure roles and privileges

The Roles module controls the users' ability to authorize or perform Cash Management operations.

Ad hoc reports

Users are assigned privileges to run specific property reports related to active receptacle sessions at their property.

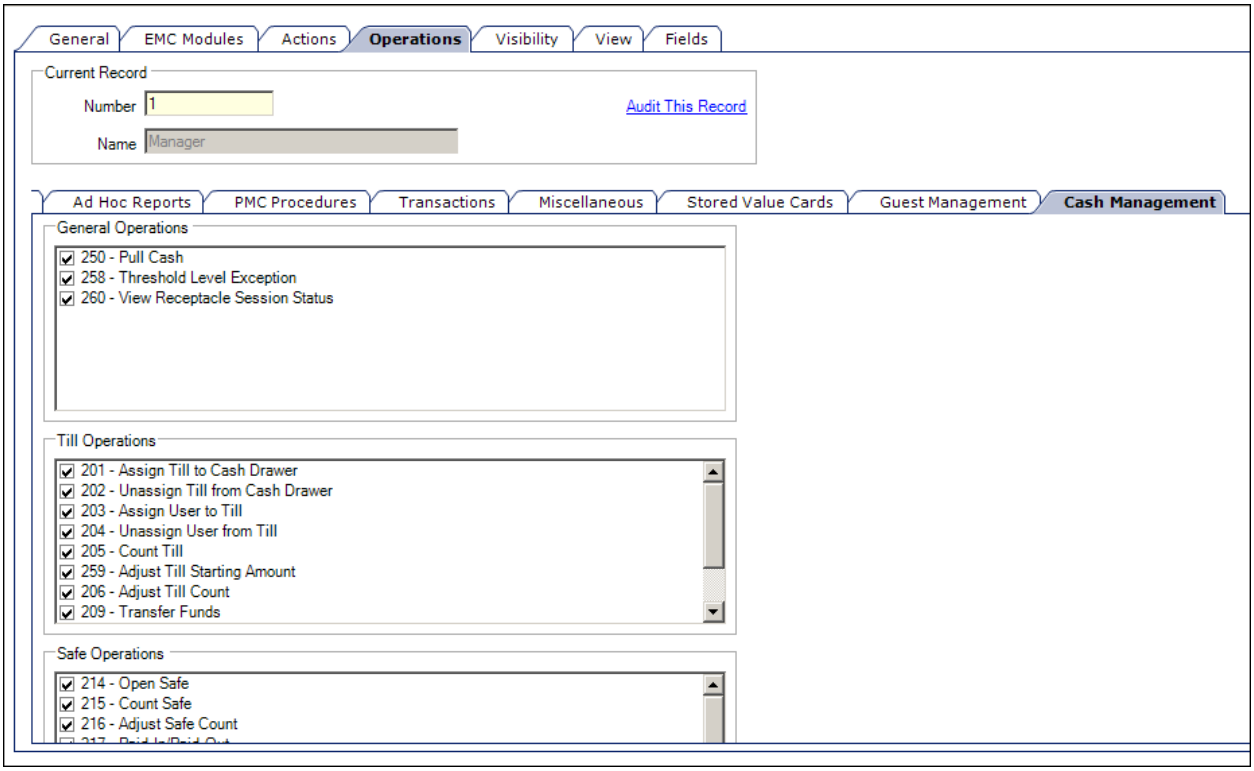
1. Select *Enterprise level* > *Configuration tab* > *Personnel* > *Roles* > *Role type* > *Operations tab* > *Ad Hoc Reports sub-tab* > ***Report Options***.
2. Select the appropriate Cash Management report(s).

Cash Management Reports

Report	Description
Run Till Report	Provides information about the active till session that is assigned on the local workstation to which the user running the report is assigned. If you print the report, you will see only values related to your activity.
Run Cash Pull Report	Provides a list of cash pulls that were performed and are outstanding (required to return to the originating till for deposit).
Run Till Banking Report	Provides information about the active till sessions for the property.
Run Safe Report	Provides information about the active safe sessions for the property.
Run Over/Short Detail Report	Provides a list and information about over and short conditions that were recorded with counts for tills and safes.
Run Bank Deposits Report	Provides information about active bank deposit sessions for the property.

Cash Management privileges

1. Select *Enterprise level* > *Configuration tab* > *Personnel* > *Roles* > *Role type* > *Operations tab* > ***Cash Management***.



2. Select the appropriate boxes for the desired privileges.

   The following table summarizes the privileges associated with ECM functionality and the recommended role(s) to have the privilege enabled.

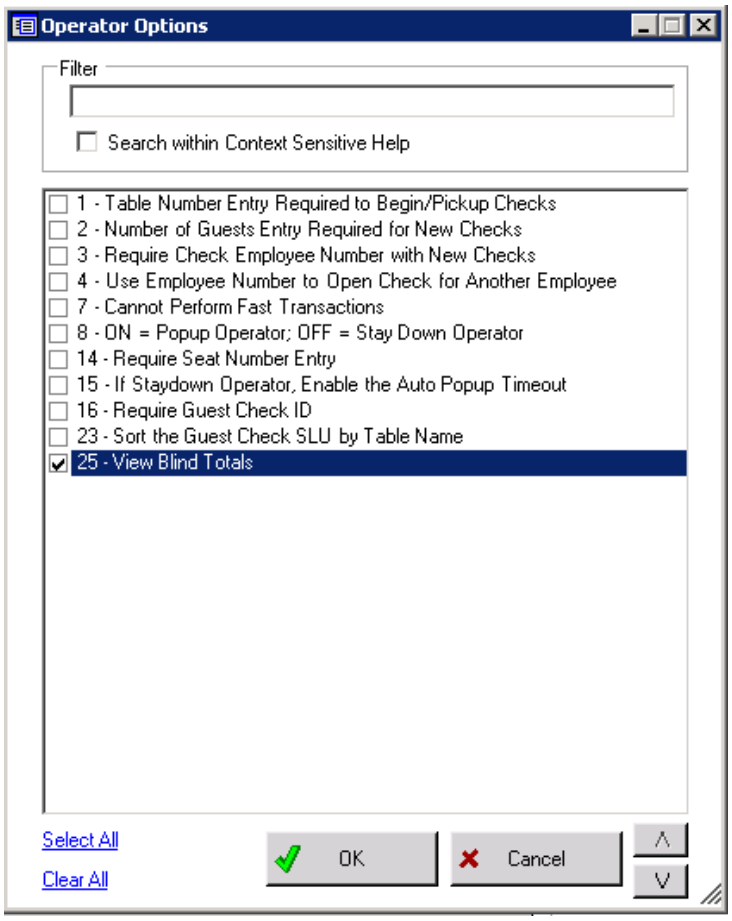
Section	Option Number	Privilege Name	Description	Recommended Role(s)
General Operations	250	Pull Cash	Perform or authorize a cash pull from a till.	Cashier, Manager
General Operations	258	Threshold Level Exception	Authorize a Cash Pull Threshold Exception (bypass the triggered threshold) when prompted and permitted.	Manager
General Operations	260	View Receptacle Session Status	View summary information for all receptacle sessions.	Manager
Till Operations	201	Assign Till to Cash Drawer	Assign a till to a cash drawer on a workstation.	Manager
Till Operations	202	Unassign Till from Cash Drawer	Unassign a till from a cash drawer on a workstation.	Manager
Till Operations	203	Assign User to Till	Assign other employees to an active till.	Manager
Till Operations	204	Unassign User from Till	Unassign employees from an active till.	Manager
Till Operations	205	Count Till	Perform or authorize the counting of a till.	Any Cash Handling User

Section	Option Number	Privilege Name	Description	Recommended Role(s)
Till Operations	259	Adjust Till Starting Amount	Adjust a till starting amount.	Manager
Till Operations	206	Adjust Till Count	Adjust a till count.	Manager
Till Operations	209	Transfer Funds	Transfer funds from a till to another cash receptacle.	Cashier, Manager
Till Operations	210	Deposit Funds	Deposit cash from a till to a bank deposit.	Any Cash Handling User
Till Operations	212	Close Till	Close a till.	Any Cash Handling User
Till Operations	251	Quick Start Till	Quick Start a till or assign a till to a cash drawer.	Any Cash Handling User
Till Operations	207	Paid-In/Paid-Out	Perform a paid-in or paid-out on a till.	Manager
Safe Operations	214	Open Safe	Open a new safe session.	Manager
Safe Operations	215	Count Safe	Perform a count of a safe.	Manager
Safe Operations	216	Adjust Safe Count	Adjust a count for a safe.	Manager
Safe Operations	217	Paid-In/Paid-Out	Execute a paid-in or paid-out on a safe.	Manager
Safe Operations	218	Transfer Funds	Transfer funds from a safe to another cash receptacle.	Manager
Safe Operations	219	Deposit Funds	Deposit cash from a safe to a bank deposit.	Manager
Safe Operations	220	Close Safe	Close a safe session.	Manager
Bank Deposit Operations	233	Create a Bank Deposit	Open a new bank deposit session.	Manager
Bank Deposit Operations	234	Transfer Funds	Transfer funds from a bank deposit to another cash receptacle.	Manager
Bank Deposit Operations	237	Adjust Cash Deposit	Adjust a cash amount deposited into the bank deposit.	Manager
Bank Deposit Operations	239	Reconcile Bank Deposit	Reconcile a bank deposit.	Manager
Bank Deposit Operations	264	Adjust Bank Deposit Reference	Adjust a reference on a bank deposit.	Manager
Change Order Operations	230	Create Change Order	Create a new Change Order request.	Manager

Allow users to view blind totals (optional)

Selecting option **[25 – View Blind Totals]** allows users within the Employee Class to view system expected values and compare them against actual counted values to determine any over/short calculations on count sheets. During a count you see the system total and variance in addition to the counted total. If there is an over/short condition, a drop-down appears so you can select the reason for the overage or shortage.

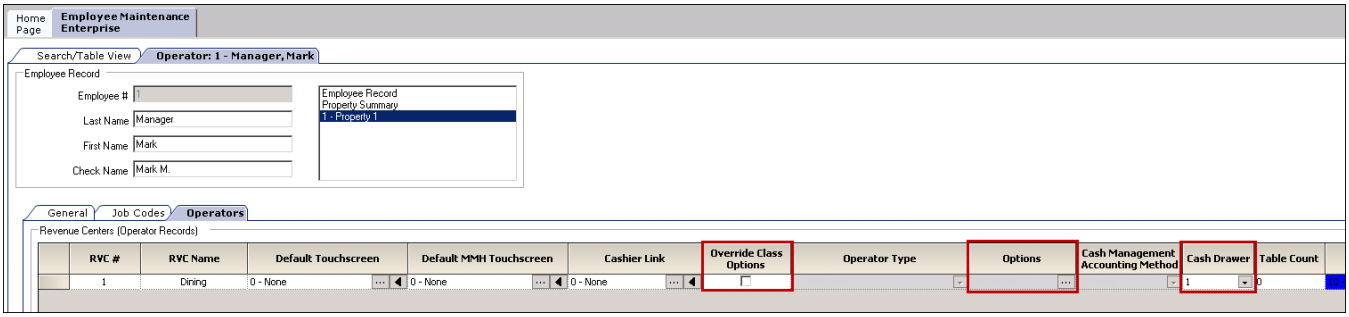
1. Select *Property level* > *Configuration tab* > *Personnel* > *Employee Classes* > *Role type* > ***Operator Options***.
2. Select option **[25]** if desired.



Allow users to override class options

You can override the Employee Class options for individual users.

1. Select *Enterprise / Zone / Property / Revenue Center level* > *Configuration tab* > *Employee Maintenance* > ***Operator Records***.



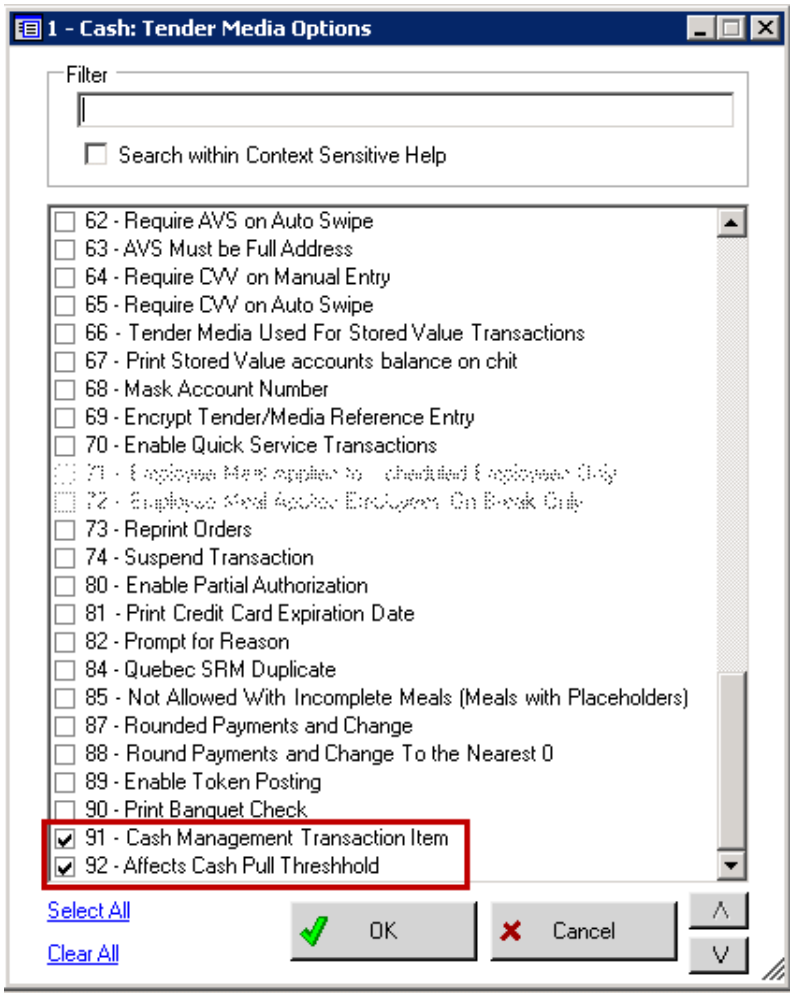
2. Select the desired options.

Option	Description
Override Class Options	When you select this option for a user, the Options field also becomes selected and those options will override the Employee Class Operator Options.
Options	When Override Class Options is selected, the Operator Options for the user revenue center become selected. You can override the option **[25 – View Blind Totals]** here.
Cash Drawer	This option indicates the cash drawer that is permanently assigned to each operator at the revenue center: 0 (no cash drawer assignment), 1, or 2. This is used when the workstation option **[Assign Cash Drawer by Workstation]** is not selected and when performing the Quick Start till operation in Ops.

Identify tender transaction items

You can identify Tender / Media records as Cash Management transaction items to allow them to be tracked in ECM.

1. Select *Enterprise / Property / Zone* > *Configuration tab* > *Tender/Media module* > ***Options***.



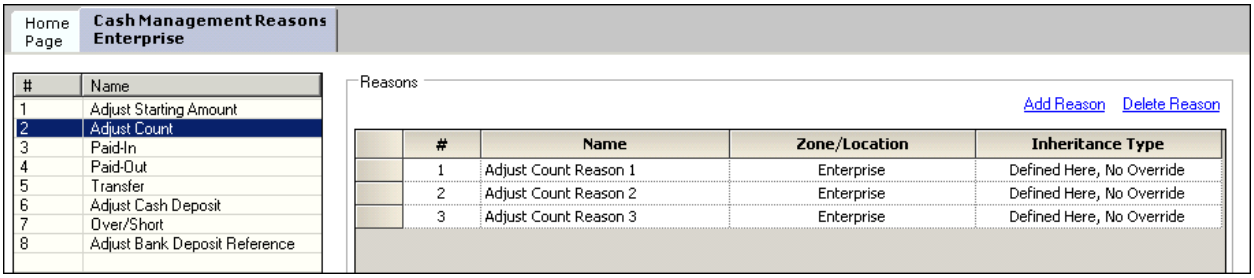
2. Select the appropriate Tender Media options.

Option	Description
91 – Cash Management Transaction Item	When this option is selected, the tender record will be included in Cash Management tracking and reporting.
92 – Affects Cash Pull Threshold	When this option is selected, transactions performed for this tender record will affect the value used by the Cash Pull Threshold Sets. Select this option only for those records that will present a loss if they are lost or stolen (for example, cash, check, and pre-activated gift card).

Create Cash Management reasons

When certain Cash Management operations are performed, the Ops user is allowed, and sometimes required, to enter a reason for performing the operation. For example, users must provide a reason for adjustment operations.

1. Select *Enterprise / Zone / Property / Revenue Center > Descriptors tab > Reasons >* ***Cash Management Reasons***.



2. Define one or more reasons for each transaction.
   a. Highlight the Cash Management transaction.
   b. Click **Add Reason**.
   c. Type the name of the reason. Each reason name can be used only once per transaction type.
   d. Save the changes.

Edit reasons

1. Highlight the reason record.
2. Change the name of the reason and save.

Delete reasons

1. Highlight the reason record.
2. Click **Delete Reason**.

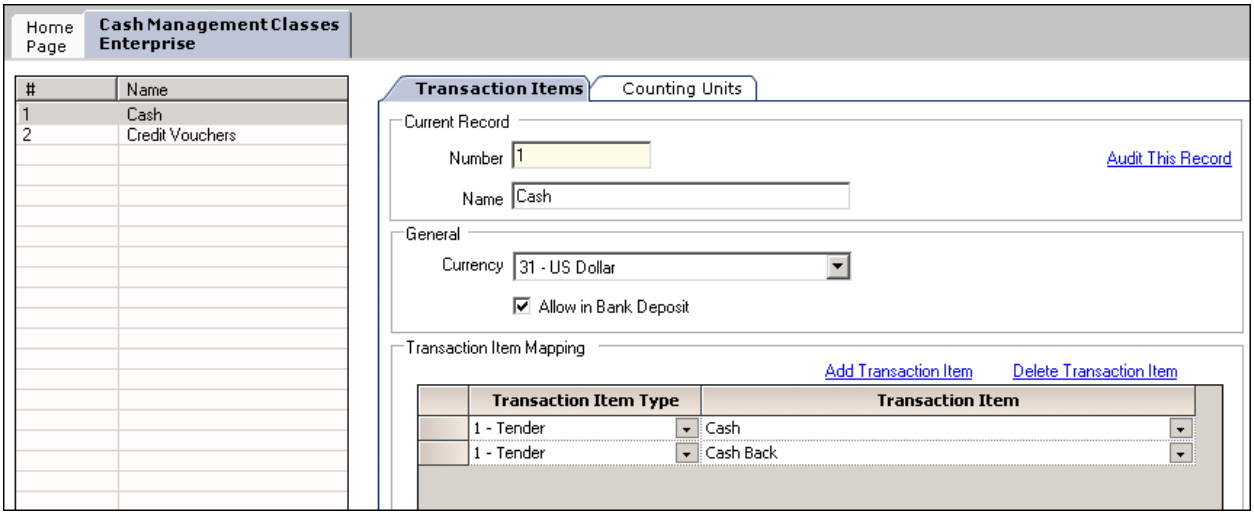
Configure Cash Management classes

A Cash Management class of transactions share similar configuration. The Cash Management class allows you to define the counting units associated with the transaction items within the class.

Add transaction items

Transaction items (for example, tenders) are mapped to the Cash Management class to measure their impact (increase/decrease) on the balance of all transactions. Only transaction items that are mapped to the class are tracked within ECM.

1. Select *Enterprise / Zone / Property / Revenue Center > Setup tab > Cash Management > Cash Management Classes >* ***Transaction Items***.

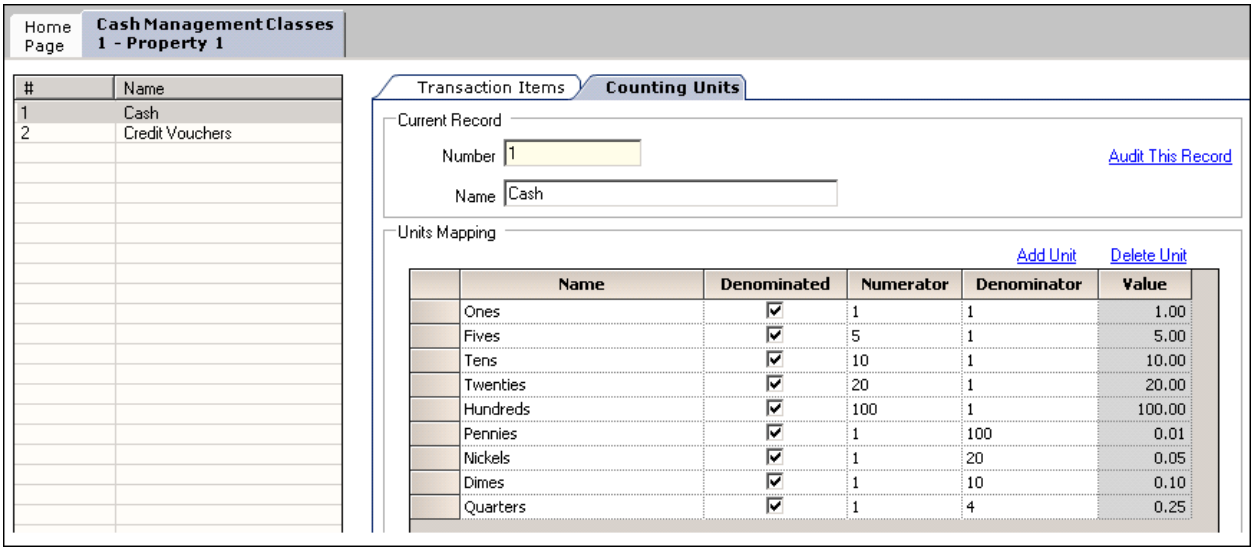


2. Type the name of the item you are tracking in ECM. If multiple currencies are tracked, create a separate class for each currency.
3. Select an available **Currency** from the list to associate with the Cash Management class. A currency can only be associated with one class. Select **0 – None** for any non-currency tracking (for example, credit cards and stored value cards) as these payment methods are not associated with a specific currency. These types of tenders are settled to the local currency of the property.
4. If you select **Allow in Bank Deposit**, any Tender Transaction Items mapped with this Cash Management class can be included in bank deposits (for example, cash, personal checks, and travelers checks).
5. Map a transaction item:
    a. Select **Add Transaction Item**.
    b. Select a **Transaction Item Type**. Currently **0 – None** and **1 – Tender** are available.
    c. Select a **Transaction Item**. Option **[91 - Cash Management Transaction Item]** (located in *Enterprise / Property / Zone > Configuration tab > Tender/Media module >* ***Options***) determines which items appear in this Transaction Item list. Each transaction item can be used only once per Cash Management class.

Add counting units

When a denomination unit is added to a Cash Management class, it can be included in any related Count Sheets and PAR Levels.

1. Select **Counting Units**.
2. Select **Add Unit**.

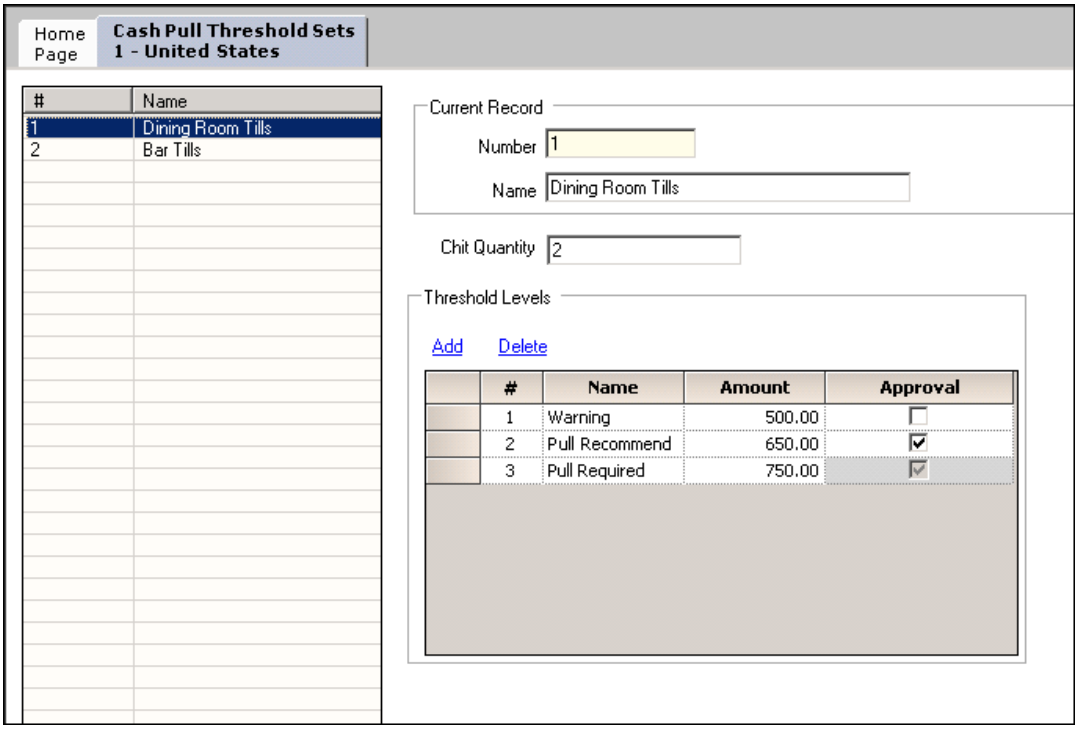


3. Type the name of the denomination unit.
4. If you select **Denominated**, the unit has a consistent cash value (for example, notes and coins). Any transaction items for this Cash Management class that may have an inconsistent cash value (for example, personal checks, credit cards, and gift cards) should remain unselected.
5. If the unit is denominated, the **Numerator** defines the units value relative to the base currency unit. For example, when the base currency is US dollars, the base currency unit is 1 ($1.00).
6. If the unit is denominated, the **Denominator** defines the number of units relative to the base currency unit. For example, when the base currency is US dollars, the base currency unit is 1 ($1.00). The default is 0.
7. After the numerator and denominator are entered, the **Value** field shows the calculated value/unit.

Create cash pull threshold set

The Cash Pull Threshold Set provides a group of balance-based levels to compare against a till during a Cash Management transaction. The threshold set indicates at what point notifications should take place for cash pulls. You may add one or more threshold levels to a Cash Pull Threshold Set. A Cash Pull Threshold set is not required.

1. Select *Enterprise / Zone / Property / Revenue Center* > *Setup tab* > *Cash Management* > ***Cash Pull Threshold Sets***.
2. Type the name of the Cash Pull Threshold Set and click **OK**.



3. Type the **Chit Quantity**. This is the number of chits that will be produced when a cash pull is performed. A cash pull chit represents the funds that have been temporarily removed from the till. If a count is performed prior to the cash pull funds being returned to the till, this chit can be included as part of the count to remove any over/short condition caused by the removal of funds.
4. Select **Add** to add a threshold level.
5. Type the name of the threshold set. The name will be used as part of the notification that appears in Ops.
6. Type the **Amount**. This is the dollar amount threshold that elevates the cash pull notification to the threshold level.

   If more than one threshold level is configured, subsequent amounts cannot be equal to or lower than the previous cash pull amount.

7. If you select **Approval**, a user with the Threshold Level Exception privilege can continue to process transactions against the receptacle without performing a cash pull.

The last defined level is not editable. It indicates that a cash pull must be performed in order to track additional activities against the receptacle.

Edit a cash pull threshold set

1. Highlight the record.
2. Change any of the values described above and save.

Delete a cash pull threshold set

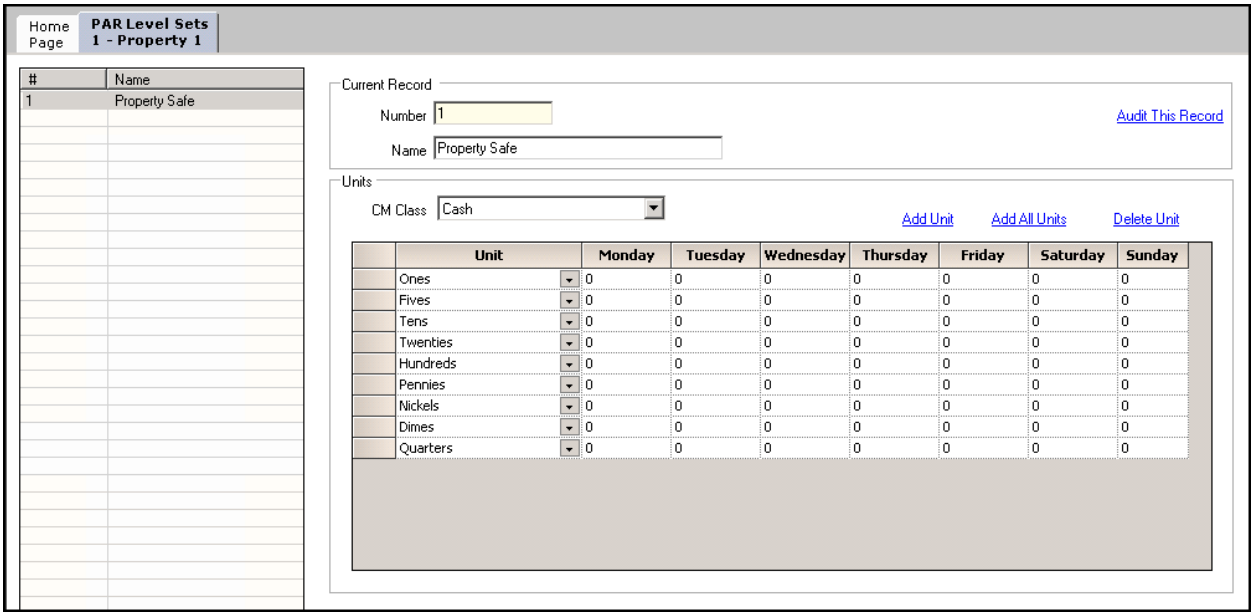
You will be notified if a Cash Pull Threshold Set is associated with one or more templates and you attempt to delete it.

1. Highlight the record.
2. Select **Delete**.

Create a PAR Level Set

Periodic Automatic Replenishment (PAR) Level Sets specify the suggested quantity to maintain of each currency denomination kept in a receptacle (for example, rolls of coins or quantity of a denominated note). PAR Level Sets are comprised of count units drawn from the list of denominated items in a Cash Management class. The PAR is used to determine the values required when issuing a Change Order request to return the receptacle back to the PAR based upon the last known count of the receptacle.

1. Select *Enterprise / Zone / Property / Revenue Center* > *Setup tab* > *Cash Management* > ***PAR Level Sets***.



2. Type the name of the PAR Level Set.
3. Select the **CM Class**. The **CM Class** list includes all Cash Management classes that were created. These Cash Management classes contain the units that are allowed within the PAR Level Set.
4. Add a Counting Unit:
    - Select **Add All Units** to have the system create all units for the Cash Management class based on the defined Counting Units for the CM Class, or
    - Select **Add Unit** to manually create each unit one at a time.
5. Edit a PAR value:
    a. Select the specific **Unit** drop-down arrow and select a different currency unit. The **Unit** list includes only counting units defined in the selected Cash Management class that will be included as part of the PAR Level Set.
    b. Type the quantity of units that will be maintained as part of the PAR Level Set per unit for each Day of the Week.
2. Delete a Counting Unit:
    a. Highlight a currency unit row.
    b. Select **Delete Unit**.

Edit a PAR Level Set

1. Highlight the record.
2. Change any of the values and save.

Delete a PAR Level Set

You will be notified if a PAR Level Set is associated with one or more templates and you attempt to delete it. If a PAR Level Set is in use by a template, you cannot delete it.

1. Highlight the record.
2. Select the red X on the toolbar.

Create Count Sheet

A Count Sheet is used during the physical counting of a receptacle. Create unique Count Sheets to determine the items and order in which a count is performed, as well as the format for the printed Count Sheet results. Creating a Count Sheet is similar to building a report.

1. Select *Enterprise / Zone / Property / Revenue Center* > *Setup tab* > *Cash Management* > ***Count Sheets***.
2. Select Insert Record on the toolbar.
3. Type a unique name for the Count Sheet and click **OK**.

Add a page

A Count Sheet Page is similar to a chapter in a report. Pages allows you to see totals for all values counted within the page.

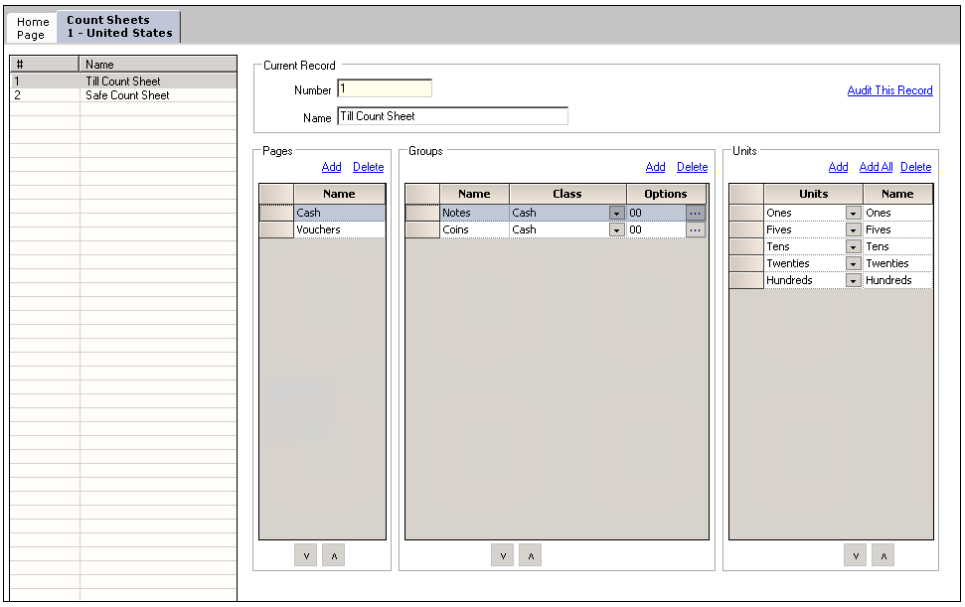
1. Select **Add** in the Pages section.
2. Type a name for each page. The following Example 1 screen shows two pages: Cash and Vouchers.

Add a group

Transaction Items are reported in Count Sheet Groups. Groups also allow you to see totals for all values counted within the group.

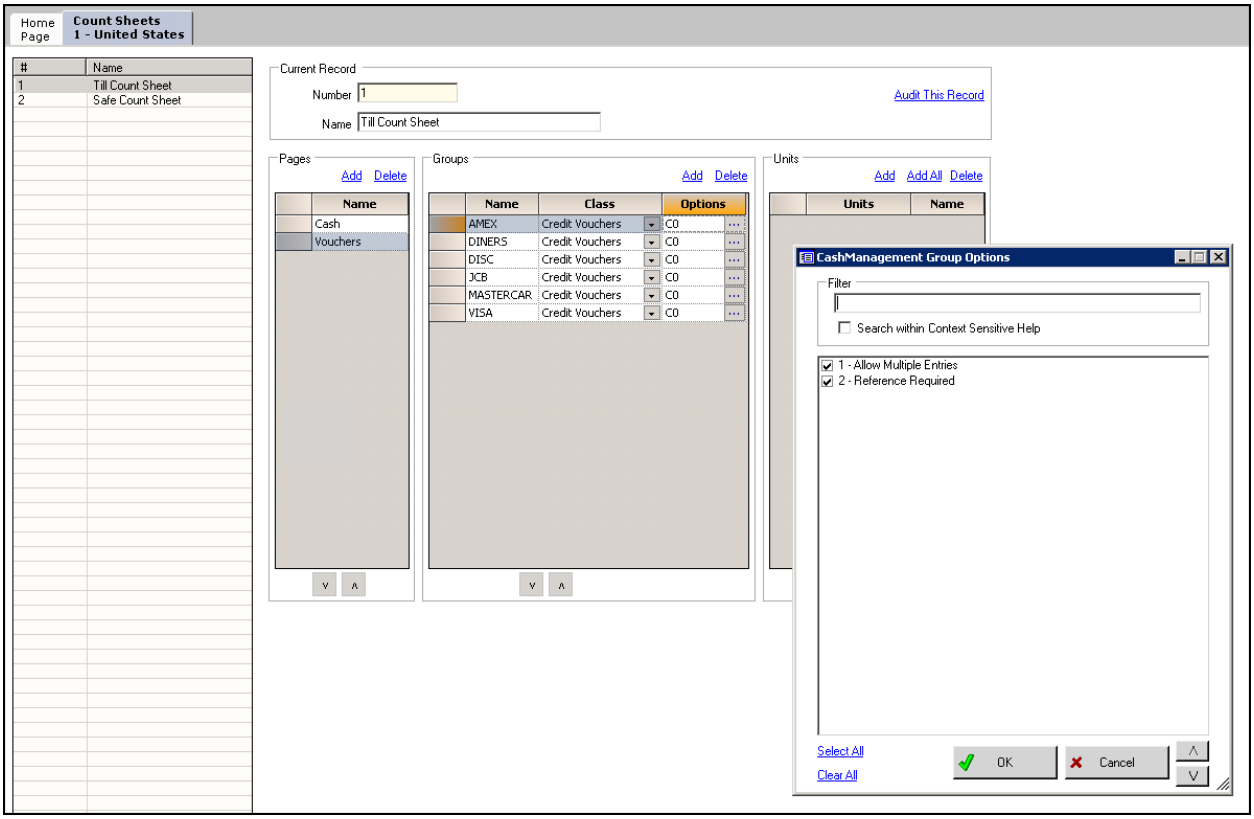
1. Highlight a page.
2. Select **Add** in the Groups section.
3. Type a name for each group. The Example 1 screen shows two groups on the Cash page: Notes (for example, paper currency) and Coins.

Add a group for cash pull chit entry with no Unit association for operations that will use cash pull. This allows you to enter the amounts for cash pulls that are performed against the session.



Groups: Example 1

4. Select the Cash Management Class for each group. When you select a value from the **Class** drop-down, the Name column shows the name of the class if it was not previously entered. Change the Name value if necessary.



Groups: Example 2

5. Select the appropriate Group options.

Option	Description
1 - Allow Multiple Entries	Selecting this option allows unique entry of certain items (for example, gift cards and checks). If option [1] is selected, the Group provides a multiple entry list when performing a count. This type of count is used to include non-denominated transaction items such as personal checks or gift cards as part of a count, where the amount of each individual item must be tracked (for example, check and gift card amounts).
2 - Reference Required	If this option is selected, the Ops user is prompted to enter a reference on the count sheet (for example, gift card number, personal check number, credit card voucher number, or Auth code).

6. Add other groups that are to be tracked as part of this page.

Add a unit

A unit is optional. If you do not add a unit, a Total entry appears for the group.

1. Select a group.
2. Select **Add** in the Units section to add all units that will be counted as part of this group.
3. Select the **Unit Type** for each unit. Only the Unit Types associated with the Cash Management class for the group are available in the Units list. When you select a value from the Units drop-down, the Name column shows the name of the unit selected. Change the Name value if necessary. Each Unit Type can only be used once on a page.

Sort and modify order of pages, groups, and units

Use the up/down (^v) arrows to sort and alter the order in which pages, groups on a page, and units within a group are presented in the screen view and printed Count Sheet.

Any units that are part of the selected group will remain with the group as it is moved. Any units that are part of groups for the selected page will remain with the page as it is moved. Any groups that are part of the selected page will remain with the page as it is moved.

Totals page

At the end of each Count Sheet, a Totals page represents the values entered. In the example, two page totals will appear: a Cash Total, and a Vouchers Total.

Edit a Count Sheet

When you change a Count Sheet, any units that are associated with the group are removed.

1. Double-click the Count Sheet record. This Count Sheet opens to allow changes.
2. Change any of the values and save.

Delete a Count Sheet

If a Count Sheet is in use by a template, you cannot delete it.

1. Select *Enterprise* / *Zone* / *Property* / *Revenue Center* > *Setup tab* > *Cash Management* > ***Count Sheets***.
2. Highlight the Count Sheet record.
3. Select the red X on the toolbar.

Delete a page

Any units associated with a group for the selected page will also be deleted along with the page.

1. Highlight the page name record.
2. Select **Delete**.

Delete a group

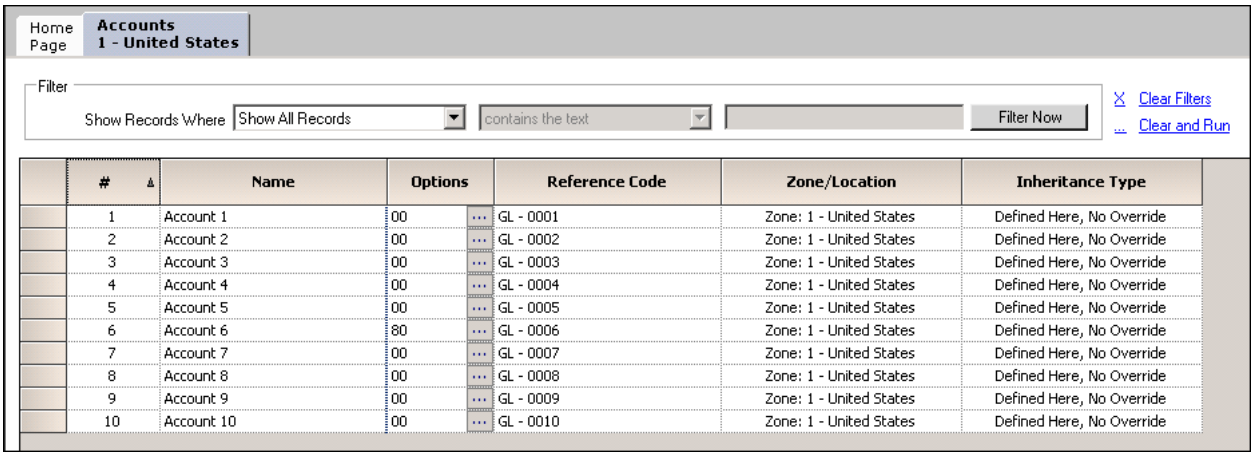
Any units associated with a group will also be deleted along with the group.

1. Highlight the group record.
2. Select **Delete**.

Create account

Accounts are used to report general ledger accounting information for paid-in and paid-out transactions to and from vendors (for example, produce, meat, bakery, or flower shop).

1. Select *Enterprise / Zone / Property / Revenue Center* > *Setup tab* > *Cash Management* > ***Accounts***.
2. Select Insert Record on the toolbar.
3. Type a unique name for the account.



#	Name	Options	Reference Code	Zone/Location	Inheritance Type
1	Account 1	00	GL - 0001	Zone: 1 - United States	Defined Here, No Override
2	Account 2	00	GL - 0002	Zone: 1 - United States	Defined Here, No Override
3	Account 3	00	GL - 0003	Zone: 1 - United States	Defined Here, No Override
4	Account 4	00	GL - 0004	Zone: 1 - United States	Defined Here, No Override
5	Account 5	00	GL - 0005	Zone: 1 - United States	Defined Here, No Override
6	Account 6	80	GL - 0006	Zone: 1 - United States	Defined Here, No Override
7	Account 7	00	GL - 0007	Zone: 1 - United States	Defined Here, No Override
8	Account 8	00	GL - 0008	Zone: 1 - United States	Defined Here, No Override
9	Account 9	00	GL - 0009	Zone: 1 - United States	Defined Here, No Override
10	Account 10	00	GL - 0010	Zone: 1 - United States	Defined Here, No Override

4. Select the appropriate options.

Option	Description
Deactivate Account	Select this option to deactivate/suspend an account that is no longer used. Each account will be activated by default when created.
Reference Code (optional)	A Reference Code may be used for representation in reporting (for example, entry of an account number associated with the account name).

Edit an account

1. Change any of the values and save.

Delete an account

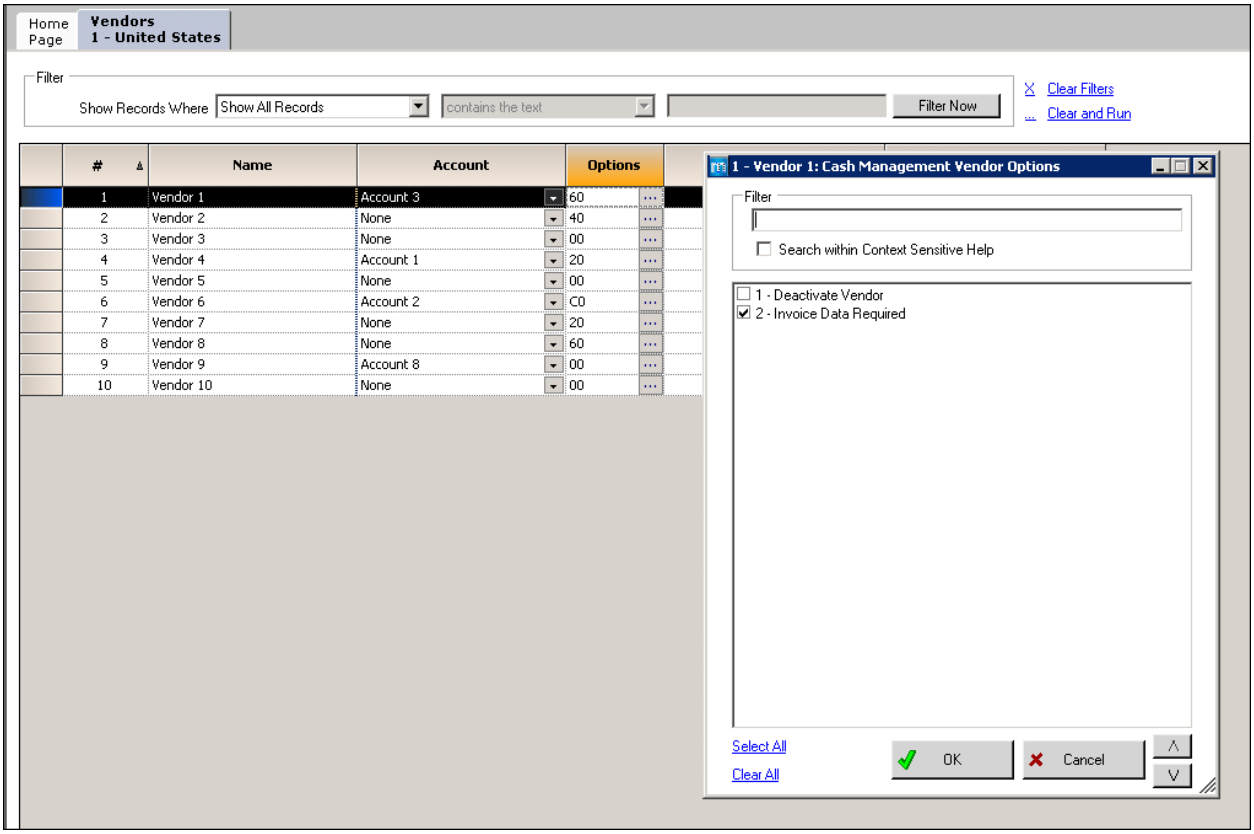
If an account is currently in use or assigned to a vendor, you cannot delete the account record. You will need to deactivate the vendor by following the instructions in the following section titled Create vendor.

1. Select *Enterprise / Zone / Property / Revenue Center* > *Setup tab* > *Cash Management* > ***Accounts***.
2. Highlight the PAR Level Set row.
3. Select the red X on the toolbar.

Create vendor

Vendors are used to report the names of companies to whom money is paid in and paid out.

1. Select *Enterprise / Zone / Property / Revenue Center > Setup tab > Cash Management >* ***Vendors***.
2. Select Insert Record on the toolbar.
3. Type a unique name for the vendor.
4. Select an **Account** from the drop-down list to associate with the vendor. This vendor will always use the selected account for any paid-in or paid-out transaction that is performed with this vendor.



5. Select the appropriate vendor options.

Option	Description
1 - Deactivate Vendor	Select this option to prevent further selection of the vendor when performing transactions. This option may be used to place a credit hold, for example. A newly created vendor is active by default.
2 - Invoice Data Required	Select this option to require the user to enter invoice information (for example, Date, Invoice Number, and Description) when performing a transaction for the vendor that can collect invoice data (for example, paid-out).

Edit a vendor

1. Change any of the values and save.

Delete a vendor

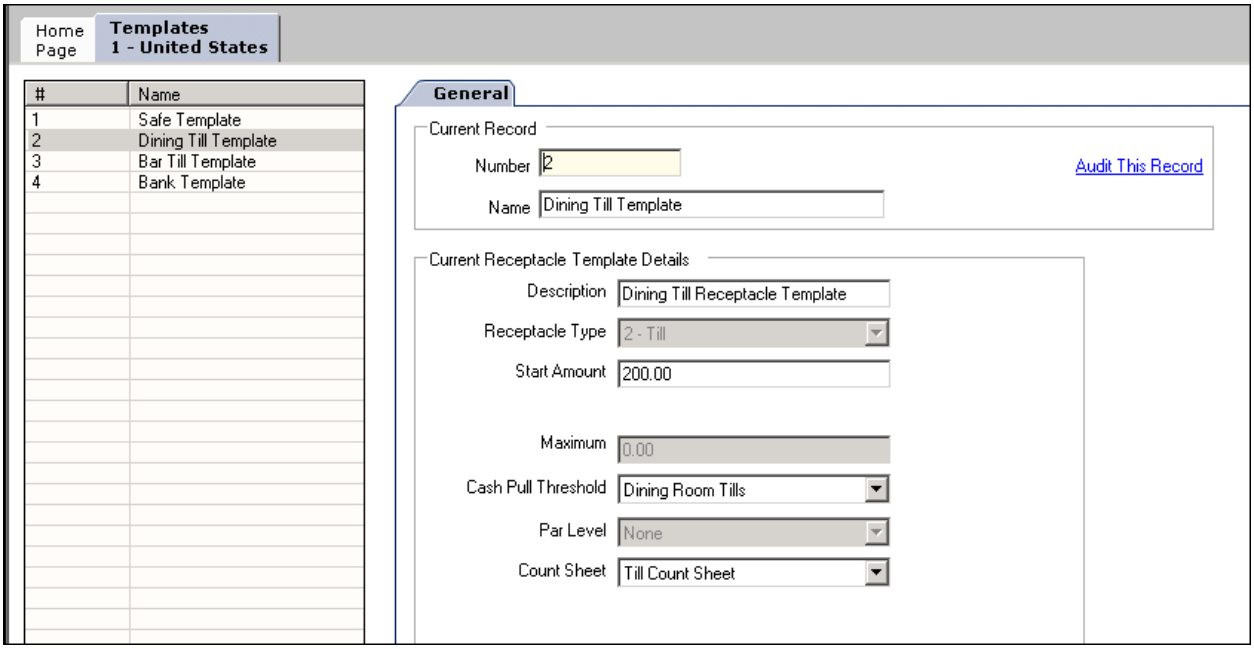
Deleting a vendor is not permitted when the vendor has related records (for example, assigned to an account).

1. Select *Enterprise* / *Zone* / *Property* / *Revenue Center* > *Setup tab* > *Cash Management* > ***Vendors***.
2. Highlight the appropriate vendor row.
3. Select the red X on the toolbar.

Create template

Templates are required to set the initial configuration and operating values for a new receptacle tracking session. This includes amount, assigning a count sheet, and specifying handling of the opening balance once the receptacle is closed.

1. Select *Enterprise / Zone / Property / Revenue Center* > *Setup tab* > *Cash Management* > ***Templates***.
2. Select Insert Record on the toolbar.
3. Type a unique name for the template record.



4. Type or select information in the following fields.

Description

The optional **Description** field in a template provides further understanding of the template that may not be distinguishable by simply looking at the template name. The Description is not shown as part of the receptacle when you open the receptacle from a template.

Receptacle Type

Select the Receptacle Type: None, Safe, Till, or Bank Deposit. Depending on your selection, additional fields are available. The following table shows the four template receptacle types and indicates which fields are applicable for each receptacle type.

	Template Receptacle Type		
Field	**Safe**	**Till**	**Bank Deposit**
Start Amount		x	
Starting Amount Source		x	x
Maximum			x
Cash Pull Threshold		x	
Cash Pull Destination		x	x
PAR Level	x		
Count Sheet	x	x	

- Safe – When creating a new safe template, the Description, PAR Level, and Count Sheet fields and values must be provided.
- Till – When creating a new till template, the Description, Start Amount, Cash Pull Threshold, and Count Sheet fields must be provided.
- Bank Deposit – When creating a new bank deposit template, the Description and Maximum balance fields and values must be provided.

Start Amount

The starting amount determines the initial currency value that is part of any receptacle type. The default starting amount is $0.00.

Starting Amount Source

The starting amount may originate from a source other than the receptacle itself. For example, funds from a safe may be transferred to a till when the till session is opened. Select a source receptacle; if you select None, starting funds are part of the receptacle and are not transferred from another source.

Prompt for Starting Amount

Select this option to prompt the Ops user to enter a value as the starting amount. When this option is selected, the start amount value is dimmed and cannot be entered.

Maximum

The Maximum balance determines the largest amount of funds permitted as part of a bank deposit receptacle. If a Maximum balance is not set, it will default to $0.00. This allows users to reconcile a bank deposit of any value.

Cash Pull Threshold

This optional field defines the Cash Pull Threshold Set that is used by a till receptacle. If cash pull values were set, select a threshold set from the drop-down list to be used for the template.

Cash Pull Destination

Select a destination receptacle into which funds from cash pull operations will be transferred; if you select None, ownership of funds remains with the source receptacle.

PAR Level

The PAR Level value in a template is part of a safe receptacle and is used to count currency denominations. If PAR Levels were set, select one from the list to be used for the template.

Count Sheet

The Count Sheet value in a template determines the Count Sheet that will be part of a safe or till receptacle and is used to count tracked transactions. If Count Sheets were set, select one from the list to be used for the template.

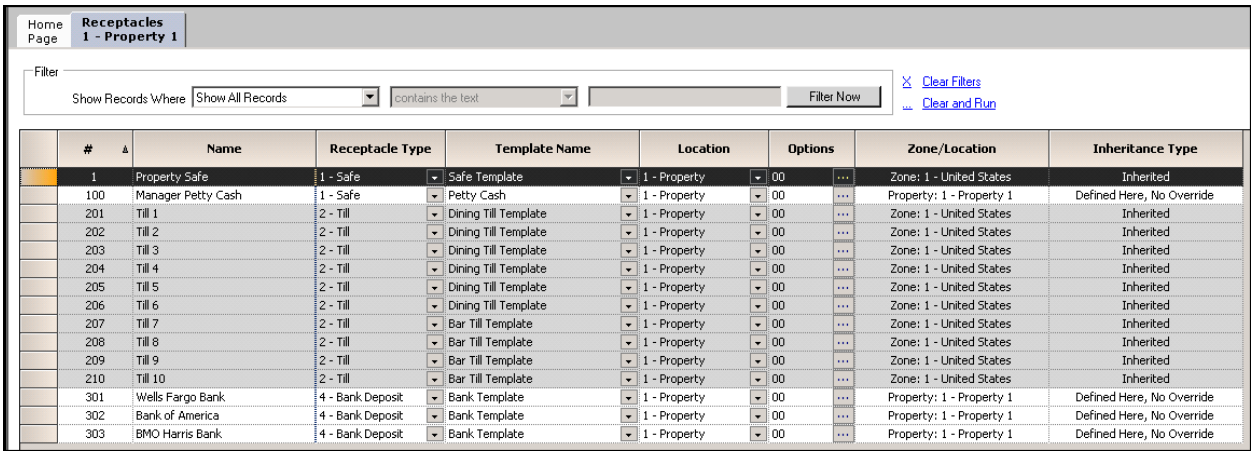
Edit a template

1. Double-click the template record. The template opens to allow changes.
2. Save your changes.

Create receptacles

A receptacle represents a physical or virtual location used to store money and draw transactions. Safes, tills, and bank deposits are Enterprise Cash Management receptacles.

1. Select *Enterprise / Zone / Property / Revenue Center* > *Setup tab* > *Cash Management* > ***Receptacles***.
2. Select Insert Record on the toolbar.
3. Type a unique name for the receptacle.



#	Name	Receptacle Type	Template Name	Location	Options	Zone/Location	Inheritance Type
1	Property Safe	1 - Safe	Safe Template	1 - Property	00	Zone: 1 - United States	Inherited
100	Manager Petty Cash	1 - Safe	Petty Cash	1 - Property	00	Property: 1 - Property 1	Defined Here, No Override
201	Till 1	2 - Till	Dining Till Template	1 - Property	00	Zone: 1 - United States	Inherited
202	Till 2	2 - Till	Dining Till Template	1 - Property	00	Zone: 1 - United States	Inherited
203	Till 3	2 - Till	Dining Till Template	1 - Property	00	Zone: 1 - United States	Inherited
204	Till 4	2 - Till	Dining Till Template	1 - Property	00	Zone: 1 - United States	Inherited
205	Till 5	2 - Till	Dining Till Template	1 - Property	00	Zone: 1 - United States	Inherited
206	Till 6	2 - Till	Dining Till Template	1 - Property	00	Zone: 1 - United States	Inherited
207	Till 7	2 - Till	Bar Till Template	1 - Property	00	Zone: 1 - United States	Inherited
208	Till 8	2 - Till	Bar Till Template	1 - Property	00	Zone: 1 - United States	Inherited
209	Till 9	2 - Till	Bar Till Template	1 - Property	00	Zone: 1 - United States	Inherited
210	Till 10	2 - Till	Bar Till Template	1 - Property	00	Zone: 1 - United States	Inherited
301	Wells Fargo Bank	4 - Bank Deposit	Bank Template	1 - Property	00	Property: 1 - Property 1	Defined Here, No Override
302	Bank of America	4 - Bank Deposit	Bank Template	1 - Property	00	Property: 1 - Property 1	Defined Here, No Override
303	BMO Harris Bank	4 - Bank Deposit	Bank Template	1 - Property	00	Property: 1 - Property 1	Defined Here, No Override

4. Type or select information in the fields.

Field	Description
Receptacle Type	Select the type of receptacle: • 0 - None • 1 - Safe • 2 - Till • 4 - Bank Deposit
Template Name	Select the appropriate template to use for this receptacle.
Location	Select the location where the receptacle lives. The location allows you to specify a receptacle name and configuration that will be used in multiple locations. If you select Zone or Property, the receptacle will be available across all zones or properties. If you select Revenue Center, the receptacle will be available across all revenue centers. As an example, define a safe for each revenue center in which revenue center business could be performed against. Open each revenue center and create a receptacle. The Location field provides a method in which to define the safe receptacle once and specify the location. That safe receptacle is uniquely identified at all revenue centers under the current level without having to go to each revenue center and create each one separately.
Options	Selecting the **Deactivate Receptacle** option prevents further activity from being performed against the receptacle.

Edit a receptacle

1. Double-click the receptacle record.
2. Change any of the values and save.

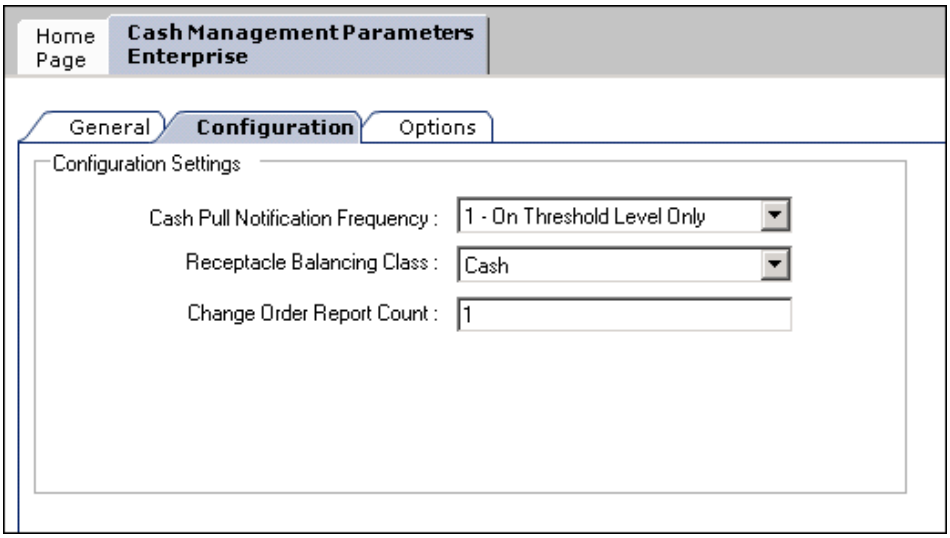
Delete a receptacle

Deleting a receptacle is not permitted within ECM. You can deactivate a receptacle by selecting the option **Deactivate Receptacle**.

Set Cash Management parameters

Configuration

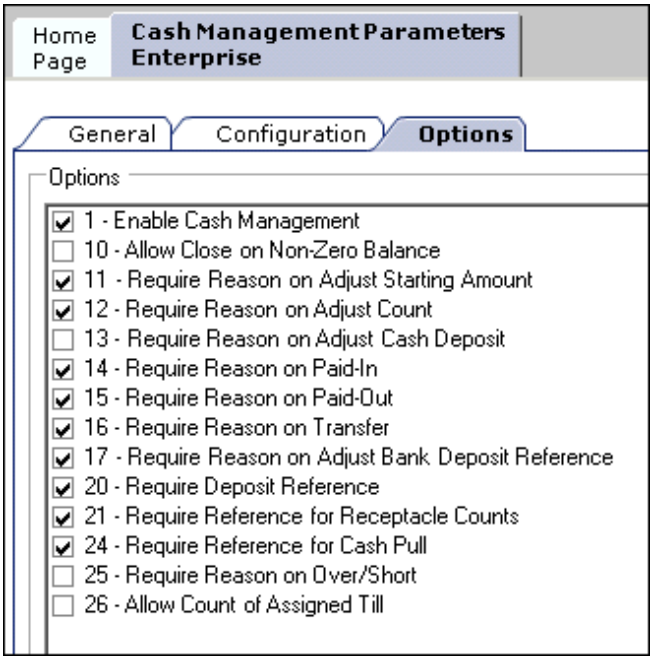
1. Select *Enterprise / Zone / Property / Revenue Center > Setup tab > Cash Management > Cash Management Parameters* > ***Configuration***.



2. Type or select information in the fields.

Field	Description
Cash Pull Notification Frequency	This field determines whether the Ops user will be notified of the cash pull threshold when the defined levels are reached/exceeded or with each transaction attempt. • **0 - None** – Cash pull notifications are disabled (default); must use manual process for cash pulls • **1 - On Threshold Level Only** – Notify the Ops user only once when they have reached or exceeded a defined threshold level in the Threshold Level Set. When reached, each threshold level will provide one notification (similar to an automobile fuel gauge notification). • **2 - On Each Transaction** – Notify the Ops user each time they access a guest check once they have reached or exceeded a defined threshold level in the Threshold Level Set.
Receptacle Balancing Class	All POS transaction items that are part of the selected Cash Management class here will determine the balance of a receptacle on views and reports. Any Cash Management classes that have been defined are available in the list.
Change Order Report Count	The value entered in this field determines the number of Change Order reports that will be printed.
Paid-In / Paid-Out Chit Count	The value entered in this field determines the number of chits that will be printed when a user performs a paid-in or paid-out on a safe or till.

3. Select **Options**.



4. Select the appropriate options.

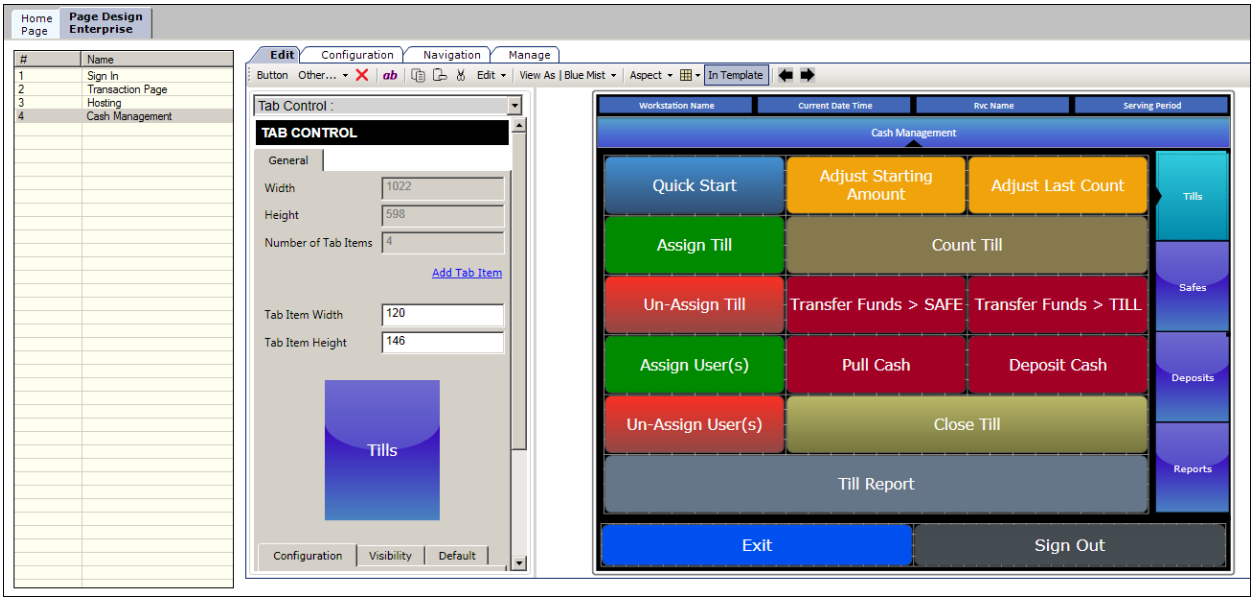
Option	Description
1 - Enable Cash Management	This option turns on ECM features and functionality in Simphony and should only be selected for sites that intend to use any of the Cash Management features. Selecting Enable Cash Management increases both required workstation resources and bandwidth for communications with the enterprise. Enabling Cash Management does not affect the use or enabling of Cash Management Lite. A property (including its revenue centers) may only operate Enterprise Cash Management or Cash Management Lite — one or the other, but not both. ECM can be pre-configured without impacting operations. If you select option **[1]**, any of the Cash Management configuration can be used. In this way, you can configure ECM ahead of time and turn it on with a single option checkbox.
10 - Allow Close on Non-Zero Balance	Select this option to allow a till to be closed even if the session balance has not been returned to zero.
11 - Require Reason on Adjust Starting Amount	Select this option to require the Ops user to select a reason code when adjusting a starting amount.
12 - Require Reason on Adjust Count	Select this option to require the Ops user to select a reason code when adjusting a previously entered count.
13 - Require Reason on Adjust Cash Deposit	Select this option to require the Ops user to select a reason code when adjusting a cash deposit transaction.
14 - Require Reason on Paid-In	Select this option to require the Ops user to select a reason code when performing a paid-in transaction.
15 - Require Reason on Paid-Out	Select this option to require the Ops user to select a reason code when performing a paid-out transaction.

Option	Description
16 - Require Reason on Transfer	Select this option to require the Ops user to select a reason code when transferring funds from one receptacle to another.
17 - Require Reason on Adjust Bank Deposit Reference	Select this option to require the Ops user to select a reason code when adjusting a bank deposit reference.
20 - Require Deposit Reference	Select this option to require the Ops user to select a reason code when creating a new bank deposit.
21 - Require Reference for Receptacle Counts	Select this option to require the Ops user to enter a reference when counting a receptacle.
24 - Require Reference for Cash Pull	Select this option to require the Ops user to enter a reference when performing a cash pull.
25 - Require Reason on Over/Short	Select this option to require the Ops user to enter a reason code for any overage or shortage conditions that were recorded with counts for tills and safes.
26 – Allow Count of Assigned Till*	Select this option to allow a till that is currently assigned to a workstation to be counted.

* After upgrading to 2.7 MR2, any existing customers who wish to continue to count assigned tills will need to set this new option.

Create Front of House screens

MICROS recommends (although it is not required) that you create a page on which to place the ECM functions. Create tabs for Safe, Bank Deposit, and Till. Then create buttons on the ECM page for each of the ECM functions listed in the following table. The following screen shows an example of a page with ECM functions using the Page Design module.



Tab	Function
Safe	• Add Funds • Adjust Count • Close Receptacle • Count Receptacle • Deposit Cash • Open New Change Order Request • Open New Receptacle • Paid-In • Paid-Out • Remove Funds • Transfer Funds
Bank Deposit	• Adjust Bank Deposit Reference • Adjust Cash Deposit • Open New Receptacle • Reconcile Bank Deposit • Transfer Funds

Tab	Function
Till	• Adjust Count • Adjust Till Starting Amount • Assign Till to Cash Drawer • Assign User(s) to Till • Cash Pull • Close Receptacle • Count Receptacle • Deposit Cash • Paid-In • Paid-Out • Quick Start Till • Transfer Funds • Unassign Till from Cash Drawer • Unassign User(s) from Till
General	• View Receptacle Status • Till Assigned (Smart Key)

Configure smart key on workstation

Follow these steps to implement the optional smart key that may be used to assign a till on the sign in page of a workstation if a till is not already found.

1. Navigate to *Enterprise / Zone / Property / Revenue Center > Configuration> Page Design*.
2. Select the Sign In page.
3. On the Edit tab, click **Button**.
4. Enter information in the fields listed in the following table.

Field	Entry
Legend	Type the name of the button (for example, Till Status).
Type	Select Function from the drop-down list.
Sub Type	Click the black arrow, and then select Smart Key.
Auto Active	Select this to enable Auto Active.

5. Click the **Edit Smart Keys** button.
6. Click **Add**.
7. Enter information in the fields listed in the following table for Smart Key entry 1.

Field	Entry
Condition	Select Till Assigned from the drop-down list.
Value	Enter 1.
Legend	Type the name of the button (for example, Sign In).
Type	Select Function from the drop-down list.
Sub Type	Click the black arrow, and then select Sign-In.

8. Click **Add**.

9. Enter information in the fields listed in the following table for Smart Key entry 2.

Field	Entry
Condition	Select Default from the drop-down list.
Value	Enter 2.
Legend	Type the name of the button (for example, Assign Till).
Type	Select Function from the drop-down list.
Sub Type	Click the black arrow, and then select Assign Till To Cash Drawer.

10. Click **Close**.
11. Click **Save** on the tool bar.

Extensibility

ECM provides the following capabilities through extensibility.

- **Designate till number during assignment** – If the InitiatingCommand.Arguments is set to a valid receptacle object number, the application will attempt to use that till when assigning a till to a workstation. If the till is not found or is assigned to another workstation, Ops shows a message asking the user which till they want to assign.

Property Reporting

Property reporting at the workstation provides reports on active and completed receptacle sessions. Create buttons for each of the property reports listed in the following table.

Report	Description
Safe Report	Provides information about active safe sessions for the property.
Till Report	Provides information about active till sessions that are assigned on the workstation.
Till Banking Report	Provides information about active till sessions for the property.
Count Sheet	Provides a detailed breakdown of the counted units that were entered by the Ops user during a receptacle count. This report is only produced upon saving a receptacle count and cannot be run directly from reporting.
Change Order Request	Provides a detailed breakdown of denomination units that the property requests from the bank to allow cash change to be made for transactions. This report is only produced upon saving a Change Order Request and cannot be run directly from reporting.
Cash Pull Report	Provides a list of previously performed and outstanding cash pulls. Outstanding cash pulls indicate the value required to return to the original till for deposit.
Over/Short Detail Report	Provides a list and information for any over and short conditions that were recorded with counts. This report also includes a detailed breakdown of the Cash Management class to show where the over/short condition is defined.

Report features in mymicros.net

Enterprise Cash Management reporting for receptacles and activity is available at the enterprise and property levels.

Configure Cash Management Reports

The reports must be assigned to a user role in mymicros.net before authorized users can run them. A System Administrator typically assigns the reports to a user role.

To assign a report to a user role:

1. Within mymicros.net, select *Admin* > *Warehouse* > *Reports* > *Report Roles*.
2. Highlight a role.
3. Click **Select**.
4. On the Role Reports screen, click **Add**.
5. Select the report name(s) from the list.
6. Click **Save**.

The System Administrator must also create a report category. To create a report category:

1. Select *Admin* > *Warehouse* > *Reports* > *Report Categories*.
2. Click **Add**.
3. On the Report Categories screen, type the **Name** of the new report category, a **Description**, and specify a **Sort Order**.
4. Click **Save**.

Enterprise reporting

Enterprise reporting provides enterprise users with reports for active and completed receptacle sessions for the enterprise, including the reports listed in the following table. These reports contain drill-down options to allow simple auditing of any receptacle tracking sessions related to the report.

Report	Description
Safe Report	Provides information about safe sessions (regardless of their state) for the selected properties.
Till Report	Provides information about till sessions (regardless of their state) for the selected properties.
Bank Deposit Report	Provides information about bank deposit sessions (regardless of their state) for the selected properties.
Count Adjustment Report	Provides information about count adjustments that were performed for any receptacle tracking session for the selected properties.
Starting Amount Adjustment Report	Provides information about adjustments to starting amounts that were defined for any receptacle tracking session for the selected properties.
Over/Short Report	Provides information about over and short conditions that were reported for any receptacle tracking session for the selected properties.
Paid-In/Paid-0ut Report	Provides information about paid-in and paid-out transactions that were reported for any receptacle tracking sessions for the selected properties.
Activity Report	Provides detailed information about transactions and operations that were performed for receptacle tracking sessions. All transactions and operations are listed chronologically so an auditor can view an exact account of all activities performed from open to close for the receptacle session.

Appendix A: Workstation Hardware

The following table lists the workstation hardware models and operating system platforms supported for ECM receptacle operations and functions.

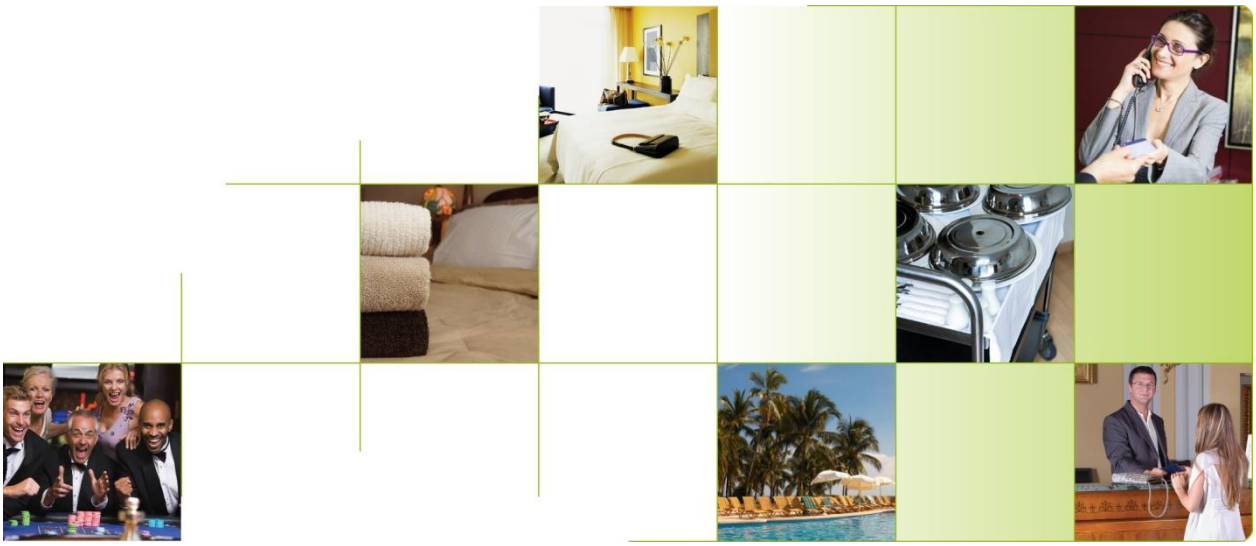
Model	Platform	ECM Features Supported?
MICROS Workstation 5a	Win32	Yes
MICROS Workstation 5a	WinCE	No
MICROS PC Workstation 2010	Win32	Yes
MICROS PC Workstation 2015	Win32	Yes
MICROS mWorkstation	Windows 8.1	No
MICROS E-Series mTablet (8” and 11”)	Windows 8.1	No
DT Research 362	POS Ready 7	Yes
DT Research 365	POS Ready 7	Yes
Motorola MC-40	Any	No
Apple iPad – All Models	iOS7	No

ECM tracked transactions (tenders) that are processed as part of normal guest check operations are included within the receptacle’s tracking session regardless of the hardware model or supported platform from which they originated.

Appendix B: Configuration Levels

The following table shows the levels within EMC that will allow configuration of ECM operations.

Configuration Name	Enterprise	Property	RVC	Zone
Accounts	*	*	*	*
Cash Management Classes	*	*	*	
Cash Management Parameters	*	*	*	
Cash Management Reasons	*	*	*	*
Cash Pull Threshold Sets	*	*	*	*
Count Sheets	*	*	*	*
Employee Classes		*		
Employee Maintenance	*	*		*
Page Design	*	*	*	*
PAR Level Sets	*	*	*	*
Vendors	*	*	*	*
Templates	*	*	*	*
Receptacles	*	*	*	*
Roles	*			



Simphony Enterprise Cash Management User Guide

ORACLE®

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Document Purpose

This guide provides user information for the Enterprise Cash Management (ECM) module features that are included in Oracle MICROS Simphony v2.7 and higher.

Related Links

All configurations for ECM functions are set in the Enterprise Management Console (EMC) application in Simphony. For more information about configuring the ECM module, refer to the *Simphony Enterprise Cash Management Configuration Guide*, available from the MICROS Member website (http://members.micros.com/members/product_support/).

Revision History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Simphony Version
Rev A	August	2014	2.7.0
Rev B	November	2014	2.7.2

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Safe operations

A safe is a physical container that is used to hold cash until it is transferred to a bank. Safes can also store any cash pulls that are performed from a till. Change orders, bank deposits, and cash pulls interact with the safe. A virtual safe receptacle session can be tracked as a Cash Management receptacle in Simphony.

Open safe

You can open a session for a safe receptacle at the local property. A session cannot be opened if a safe already has an open session; only one safe session can be open at a time.

1. Select the function to open a new safe.
2. Highlight the appropriate safe and select **OK**.
3. When prompted to activate the safe, select **Yes**.

Add funds to safe

Define the starting amount of funds that the safe will contain during opening.

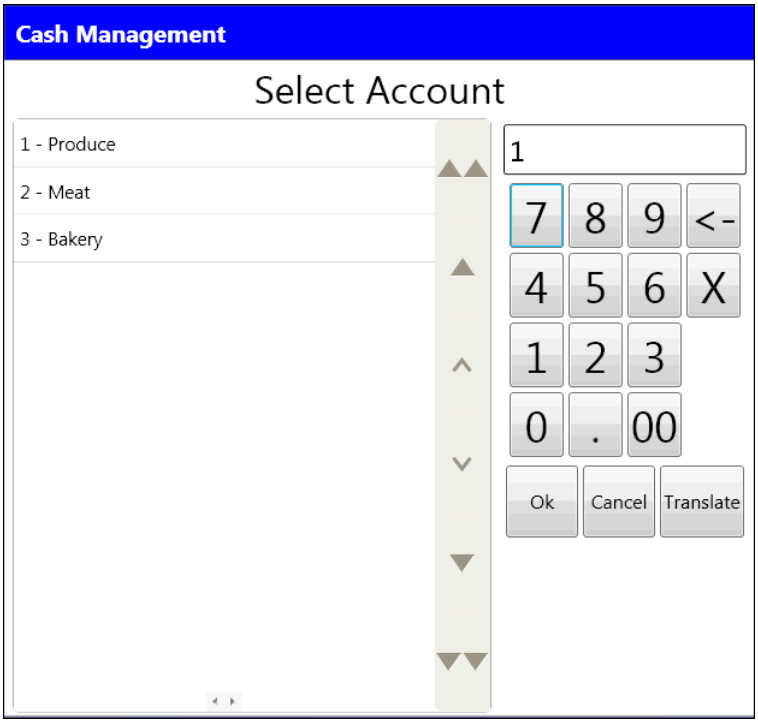
1. Select the function to add funds to a safe.
2. Highlight the type of funds and select **OK**.
3. Enter the amount of funds and select **OK**. A chit prints on the local printer.

Perform paid-in

A paid-in operation allows you to add funds to the safe receptacle that were not received from another receptacle (till or bank deposit) or guest check. For example, the paid-in funds could come from a vendor. These funds increase the safe receptacle session balance. Paid-in funds are not used to reconcile a balance on a guest check and are not included as sales revenues.

1. Select the function to perform a paid-in operation.
2. Highlight the appropriate safe and select **OK**.
3. Highlight the type of funds (class) and select **OK**.
4. Highlight the appropriate vendor and select **OK**.

5. If an account is not pre-defined in EMC for the vendor, you are prompted to select an account and then select **OK** (as shown in the following example image). If an account was pre-defined in EMC for the vendor, it is tied to that vendor and you are not prompted to select an account.



6. Enter an optional reference for the paid-in transaction and select **OK**.
7. Enter the amount that is being taken in and select **OK**.
8. Select the reason code if required. Select **Cancel** to bypass the reason code (if allowed), and then select **OK**. A receipt prints on the local printer and may be given to the vendor.

Perform paid-out

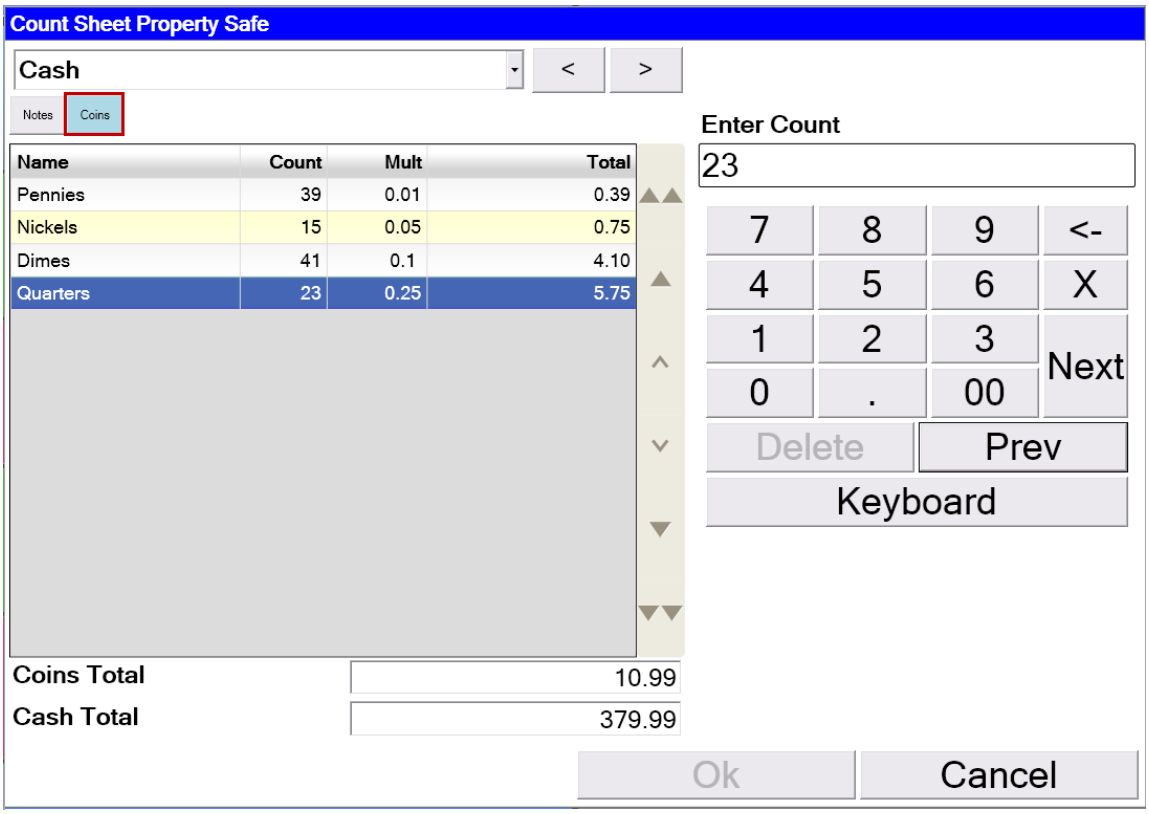
A paid-out operation allows you to remove funds from the safe receptacle that will not be received by another receptacle or employee. For example, the paid-out funds could be paid to a vendor. These funds decrease the safe receptacle session balance. Paid-out funds are not used to pay out tips and are not included as sales revenues.

1. Select the function to perform a paid-out operation.
2. Highlight the appropriate safe and select **OK**.
3. Highlight the type of funds (class) and select **OK**.
4. Highlight the appropriate vendor and select **OK**.
5. If an account is not pre-defined in EMC for the vendor, you are prompted to select an account and then select **OK**. If an account was pre-defined in EMC for the vendor, it is tied to that vendor and you are not prompted to select an account.
6. Enter an optional reference for the paid-out transaction and select **OK**.
7. If the vendor selected the Invoice Data Required option in EMC, the Invoice screens appear.
   - Enter the **Invoice Number** (if configured in the EMC Vendors module) and select **OK**.
   - Enter the **Invoice Description** and select **OK**.
8. Enter the amount that is being paid out and select **OK**.
9. If required, highlight the reason code and select **OK**. A receipt prints on the local printer. This receipt may be given to the manager to staple to the invoice and place into petty cash.

Count safe

A privileged user may count the safe receptacle based on the Count Sheet that is defined for the safe's receptacle tracking session. While the safe is being counted, no transactions are permitted in order to maintain an accurate count. Users that have the privilege to view the system totals will see system calculated totals for the CM Balancing Class and variances that occurred based on the values entered for the CM Balancing Class. If an over or short condition exists, you must select an over/short reason from a pre-defined list of reasons in order to complete the count. Upon completion of the count, the safe balance updates and the Count Sheet with the count results prints.

1. Select the function to count a safe.
2. Highlight the appropriate safe and select **OK**.
3. Enter an optional reference for the count and select **OK**.
4. The Count Sheet appears. Use this page to count the funds in the safe receptacle. The first group is shown by default on the Count Sheet.
5. Enter the number of each unit. The Count Sheet accepts keypad entry if a keyboard is physically attached to the workstation on which the count is being performed.
6. Select **Next** to move to the next unit.
7. After all units in the first group have been counted, the next group appears. (In the following example screen, the second group is indicated with the highlighted square.)



8. Enter the number of each unit, selecting **Next** to move to the next unit. (In the example the units are pennies, nickels, dimes, and quarters.)
9. Select **OK** to save the count. The Count Sheet prints on the local printer and may then be placed in the safe. The Totals Page lists the Counted totals, Expected totals, and any Variance amounts that differ from the expected amounts. If a variance is shown on the Totals Page, you may be required to select an over/short reason. To require an over/short reason, select this option in *EMC > Setup tab > Cash Management Parameters > Options tab >* ***[25 – Require Reason on Over/Short]***.

Adjust count

A privileged user can change one or more Cash Management class totals for the previous count. When making the adjustment, you must select an Adjust Count Reason from a pre-defined list of reasons to complete the adjustment. Adjusting the amount of the CM Balancing Class updates the balance for the safe.

1. Select the function to adjust a count.
2. Highlight the appropriate safe and select **OK**.
3. Select the transaction you wish to adjust: Count Class Amount, Count Sheet Reference, or Both.
4. Enter the actual amount of the CM Class and select **OK**.
5. Enter the reason code and select **OK**. No chits or receipts print for this function.

Deposit cash

A privileged user may transfer qualifying funds from the safe receptacle to a bank deposit receptacle. You must perform a count and define a bank deposit receptacle before depositing cash. You may perform a cash deposit to remove qualifying funds from the safe receptacle and place them into an open bank deposit receptacle. These funds will then be eligible for transfer from the bank deposit receptacle to another receptacle or sent to the bank as part of the submitted bank deposit.

1. Select the function to deposit cash.
2. Highlight the appropriate safe and select **OK**.
3. Select **Cash**.
4. Highlight the appropriate bank deposit and select **OK**.
5. Enter the amount to transfer from the safe to the bank deposit and select **OK**. A receipt prints on the local printer.

Transfer funds

You can move funds from one safe to another or from a safe to a till.

Transfer to safe

1. Select the function to transfer to a safe.
2. Highlight the appropriate safe and select **OK**.
3. Enter the amount that is being transferred and select **OK**.
4. If required, select the reason code. Select **Cancel** to bypass the reason code (if allowed), and then select **OK**. A receipt prints on the local printer.

Transfer to till

1. Select the function to transfer to a till.
2. Highlight the appropriate till and select **OK**.
3. Highlight the type of funds (class) to transfer and select **OK**.
4. Enter the amount that is being transferred and select **OK**.
5. If required, select the reason code. Select **Cancel** to bypass the reason code (if allowed), and then select **OK**. A receipt prints on the local printer.

Open change order

A Change Order may be used if a safe needs more one dollar bills for a seasonal or special event. A Change Order operation allows a privileged user to create a Change Order Request for the bank. This request contains a defined breakdown of currency units (for example, ones, fives, tens, etc.). You can adjust the PAR Level values for each day of the week and manually adjust any counts based on the values calculated for the Change Order.

1. Select the function to open a new Change Order.
2. Highlight the appropriate safe and select **OK**.
3. Enter an optional reference for the Change Order and select **OK**.
4. Highlight the appropriate day on the PAR Sheet. (The day defaults to the current day of the week.)
5. The Count column shows the variance between the last count and the PAR Level Set defined in EMC. You can see what is needed to return to the PAR level. Change each number as appropriate and select **OK**. A Change Order prints based on the number specified in the Cash Management Parameters Change Order Report Count field in EMC.

Remove funds

1. Select the function to remove funds.
2. Highlight the appropriate safe and select **OK**.
3. Highlight the type of funds (class) and select **OK**.
4. Enter the amount to remove and select **OK**. A chit prints on the local printer.

Close safe

A privileged user can close the safe receptacle's tracking session to prevent further activity. In order to close a safe receptacle, the balance must be zero (0).

1. Select the function to close a safe.
2. Highlight the appropriate safe and select **OK**.
3. When prompted to confirm the closure, select **Yes**.

Bank deposit operations

A bank deposit receptacle contains the funds that are deposited from either a till or safe with the intention of being submitted to the bank for deposit into an account.

Open bank deposit

A privileged user may open a bank deposit receptacle session at the property if one is not already active. You can place cash deposits from safes or tills into the bank deposit.

1. Select the function to open a bank deposit.
2. Highlight the appropriate bank name and select **OK**.

3. Enter an optional reference and select **OK**.

Adjust cash deposit

A privileged user may adjust the amount of a cash deposit that was placed into the bank deposit receptacle tracking session from a till or safe. This accounts for cash deposits where the amount deposited differs from the amount actually received in the bank deposit. When making the adjustment, you must select an Adjust Deposit Amount Reason.

1. Select the function to adjust a cash deposit.
2. Highlight the appropriate bank deposit and select **OK**.
3. If required, select the reason code. Select **Cancel** to bypass the reason code (if allowed) and then select **OK**.
4. Enter the cash deposit amount.
5. Enter an optional reference for the cash deposit and select **OK**.

Adjust reference

You can adjust the last reference entered for a bank deposit session.

1. Select the function to adjust a bank deposit reference.
2. If required, select the reason code. Select **Cancel** to bypass the reason code (if allowed) and then select **OK**.
3. Enter the new reference and select **OK**.

Transfer funds

You can move funds from one bank deposit to another or from a bank deposit to a safe. You are not allowed to transfer funds from a bank deposit after it has been submitted or reconciled.

Transfer to bank deposit

A minimum of two banks must be defined in order to transfer funds between bank deposit receptacles.

1. Select the function to transfer to a bank deposit.
2. Highlight the appropriate bank and select **OK**.
3. Enter the amount that is being transferred and select **OK**.
4. If required, select the reason code. Select **Cancel** to bypass the reason code (if allowed) and then select **OK**.

Transfer to safe

1. Select the function to transfer to a safe.
2. Highlight the appropriate safe and select **OK**.
3. Enter the amount that is being transferred and select **OK**.
4. If required, select the reason code. Select **Cancel** to bypass the reason code (if allowed) and then select **OK**.

Reconcile (close) bank deposit

A privileged user may reconcile (close) the bank deposit to prepare it for transport to the bank.

1. Select the function to close a bank deposit.
2. Highlight the appropriate bank name and select **OK**.
3. When prompted to confirm the closure, select **Yes**.

Till operations

A funded till or tray is placed into a cash drawer at a POS workstation. The funds may originate from a source other than the receptacle itself. For example, funds from a safe may be transferred to a till when the till session is opened.

You must properly assign a till receptacle in order to perform transactions against a till tray. Assign till receptacles for both cash drawers and users at the workstation in which the till tray will be placed.

A privileged user may assign/unassign a till from a cash drawer on the workstation. This operation is required before users are assigned to the till.

A privileged user may assign/unassign other users to the open till receptacle tracking session on the workstation. This operation is required before Ops users can execute transactions on a guest check from the workstation or perform any Cash Management operations.

Quick Start till

Quick Start is a time saving feature that allows you to quickly assign your till to a predefined cash drawer on the workstation.

1. Select the function to Quick Start a till.
2. If prompted, highlight the appropriate till and select **OK**.
3. If prompted, enter the starting amount, and select **OK**.
4. If prompted, select the source receptacle and select **OK**.
    a. This will only occur if the source receptacle is not found or does not have enough funds to start the till.
5. When prompted to confirm, select **Yes**.

Assign till to cash drawer

You must assign a till to a cash drawer before you can assign users to the till.

1. Select the function to assign a till to a cash drawer.
2. If prompted, highlight the appropriate till and select **OK**.
3. If prompted, enter the starting amount, and select **OK**.
4. When prompted to confirm, select **Yes**.

Assign user to till

You can assign one or more users to the open till in the workstation. You must assign Ops user(s) to the till before they can execute transactions on a guest check from the workstation or perform Cash Management operations.

1. Select the function to assign a user to a till.
2. Do one of the following:
    - Highlight the appropriate employee and select **Add** to assign employees one at a time.
    - Select **Add All** to assign all employees to a till.
3. Select **Save** to complete the assignments.
4. When prompted to confirm, select **Yes**.

Adjust starting amount

This operation allows a privileged user to change the starting amount of the till receptacle. When the till receptacle tracking session is created, the Starting Amount is based on the defined till starting value after it is pulled from a secure location and provided to the user. If the actual amount of the till differs from the expected starting amount, a change is required for the starting amount so as to not prompt the user for an over/short reason based on the perceived starting amount and the actual amounts during the count. When making the change, the user is required to select an Adjust Starting Amount Reason from the pre-defined list.

You cannot adjust the starting amount if the till session is closed, if the session recorded a transfer from the till or if funds were added to or removed from the till as part of a guest check transaction.

1. Select the function to adjust the starting amount.
2. Highlight the appropriate till (the user may be assigned to more than one) and select **OK**.
3. Enter the new starting amount for the till session and select **OK**.

Cash pull

This operation allows a privileged user to pull cash from the till tray to reduce the amount of funds present. This lowers the risk of loss in the event the property is subject to a robbery or theft.

When a pre-defined threshold is reached based on qualifying transactions, the cashier may be notified to perform a cash pull. A notification is not required to perform a cash pull. The notification tells cashiers that there is too much money in their till. Depending on the configuration, a cashier may continue to process transactions beyond the warning notification or be required to obtain management approval to continue without performing the cash pull from the till. After the system reaches a final threshold, further till transaction activity is prevented until you perform a cash pull. After you pull cash, a cash pull chit shows cash pull transaction details. You must return the cash pull amount to the till prior to closing for inclusion in the cash deposit.

1. Select the function to pull cash.
2. Enter the cash pull information and select **OK**.
3. Enter the amount to pull and select **OK**.
4. Enter an optional reference for the cash pull transaction and select **OK**. A chit prints on the local printer. Place the chit in the till tray to represent the cash funds that have been temporarily moved out of the till to a safe location. You must return these funds to the till before a bank deposit occurs.

Transfer funds

A privileged user may transfer available funds that are tracked by Cash Management from a till to a safe or from a till to another till. Funds cannot be transferred if the till session is closed.

Transfer to safe

1. Select the function to transfer to a safe.
2. Highlight the appropriate safe and select **OK**.
3. Enter the amount that is being transferred and select **OK**.
4. If required, select the reason code. Select **Cancel** to bypass the reason code (if allowed) and then select **OK**.

Transfer to till

1. Select the function to transfer to a till.
2. Highlight the appropriate till from the list and select **OK**.
3. Enter the amount that is being transferred and select **OK**.
4. If required, select the reason code. Select **Cancel** to bypass the reason code (if allowed) and then select **OK**.

Perform paid-in

A paid-in operation allows you to add funds to the till receptacle that were not received from another receptacle (safe or bank deposit) or guest check. For example, the paid-in funds could come from a vendor. These funds increase the till receptacle session balance. Paid-in funds are not used to reconcile a balance on a guest check and are not included as sales revenues.

Follow the instructions in the Safe operations Perform paid-in section on page 5.

Perform paid-out

A paid-out operation allows you to remove funds from the till receptacle that will not be received by another receptacle or employee. For example, the paid-out funds could be paid to a vendor. These funds decrease the till receptacle session balance. Paid-out funds are not used to pay out tips and are not included as sales revenues.

Follow the instructions in the Safe operations Perform paid-out section on page 6.

Unassign user from till

A user may need to be unassigned from a till, such as at the end of a shift.

1. Select the function to unassign a user from a till.
2. Do one of the following:
   - Highlight the appropriate employee and select **Remove t**o unassign employees one at a time.
   - Select **Remove All** to unassign all employees from a till.
3. Select **Save** to complete the assignments.
4. When prompted to confirm, select **Yes**.

Unassign till from cash drawer

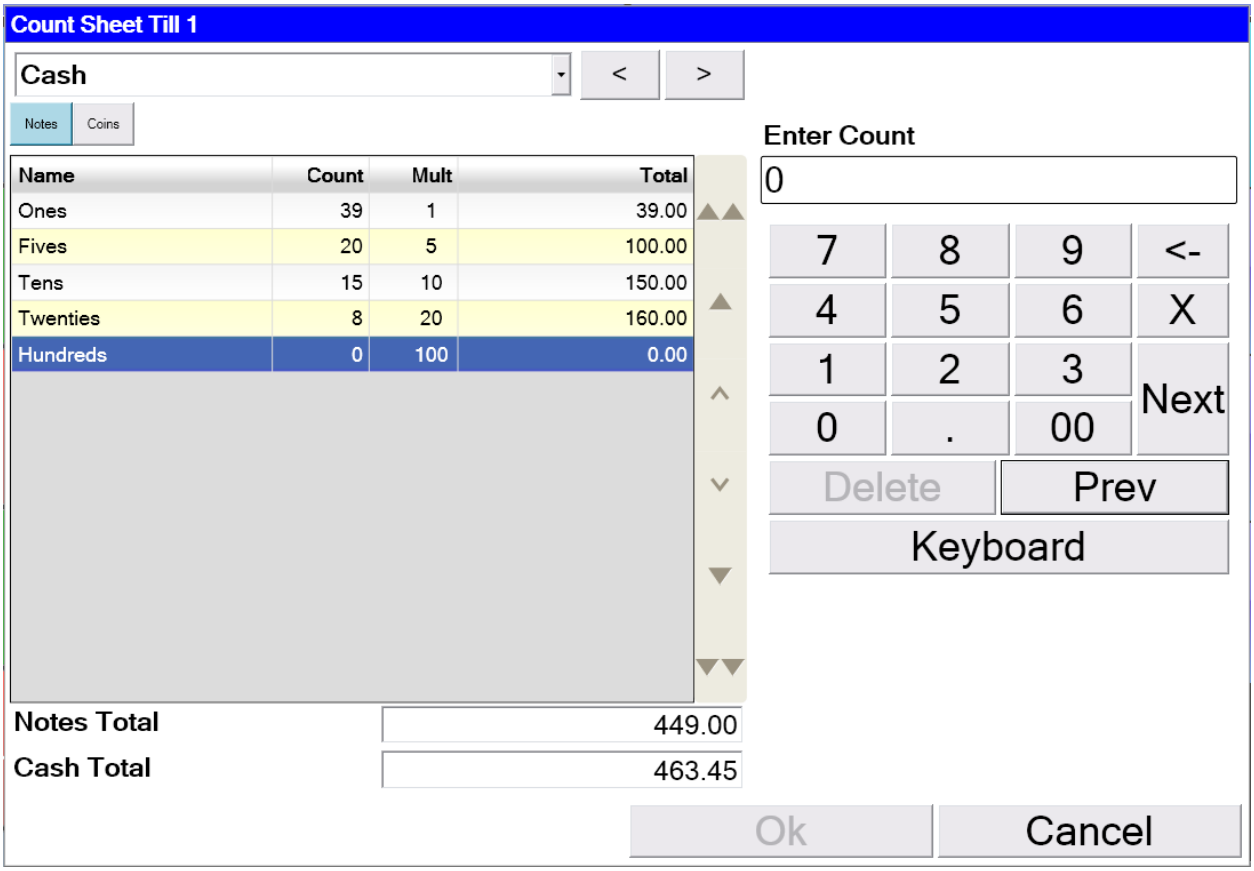
1. Select the function to unassign a till from a cash drawer.
2. When prompted to confirm, select **Yes**.

Unassigning the cash drawer does not close the till; it suspends fund income or outgoing transactions from being executed on the till for this cash drawer. After unassigning a cash drawer, you can assign the till to a different cash drawer on either the same or a different workstation.

Count till

A privileged user may count the till based on the Count Sheet defined for the till's receptacle tracking session. While the till is being counted, no transactions are permitted in order to maintain an accurate count. Users that have the privilege to view system totals will see the system calculated totals for the CM Balancing Class and any variance that occurred based on the values entered for the CM Balancing Class. When an over or short condition exists, you must select an over/short reason in order to complete the count. Upon completion of the count, the till balance updates and the Count Sheet with the count results prints.

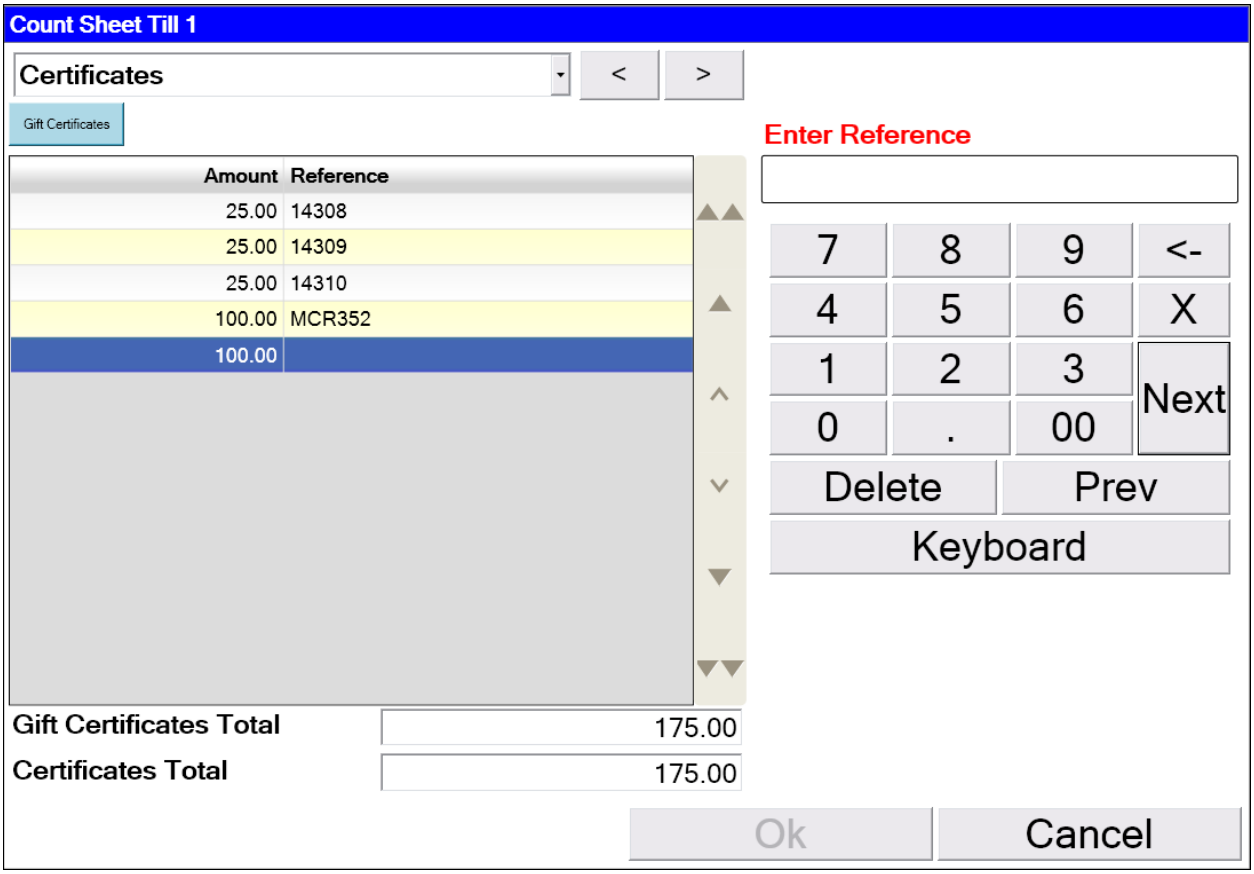
1. Select the function to count a till.
2. Highlight the appropriate till (if more than one till is open) and select **OK**.
3. Enter an optional reference for the count and select **OK**.
4. The Count Sheet appears. Use this page to count the funds in the till. On the Count Sheet, the first group appears by default.



5. Enter the number of each note (for example, ones, fives, tens, etc.). The Count Sheet accepts keypad entry if a keyboard is physically attached to the workstation on which the count is being performed.
6. Select **Next** to move to the next group.
7. The Count Sheet may include a group that is used to track non-denominated values (for example, gift certificates). Depending on the configuration, this group may allow a single entry for a lump sum of all values for that group (for example, total of all Visa credit card vouchers added to a single line item) or multiple entries for the amount of each individual voucher.
8. Each line item within a group contains a reference field. Enter a unique reference value. Depending on the configuration, the reference may be left blank or required. If a reference is

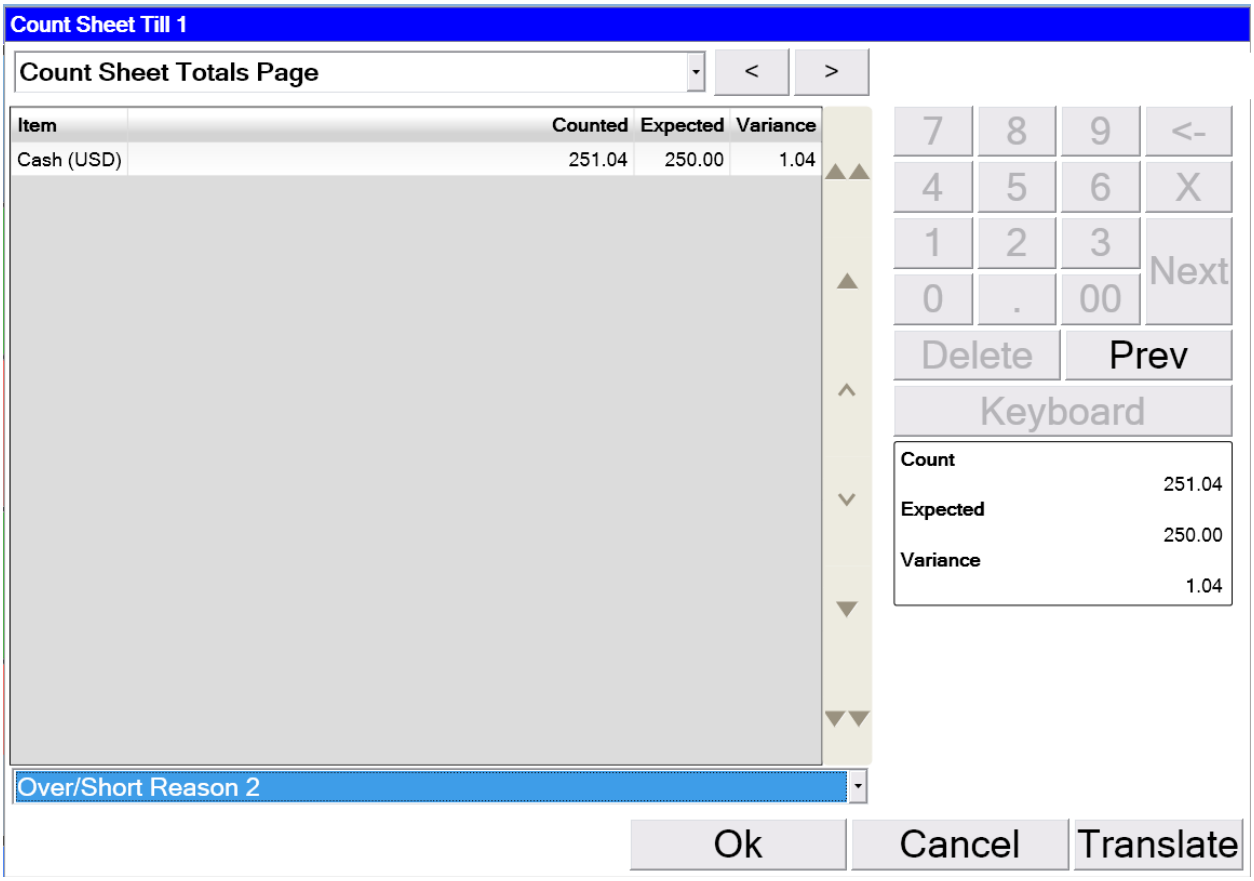
required and you attempt to advance to the next field without entering a reference, the label on the Reference field turns red.

Use **Keyboard** to enter alphabetic characters. After entering an alphanumeric value and closing the keyboard, the value entered appears in the Reference field.



9. Select **OK** to complete and save the count.

10. The Totals Page lists the Counted totals, Expected totals, and Variance amounts that differ from the expected amounts. If a variance is shown on the Totals Page, you may be required to select the over/short reason from the list. If a reason is required, you will not be able to select **OK** until you select a reason. To require an over/short reason, select this option in *EMC* > *Setup tab* > *Cash Management Parameters* > *Options* > ***[25 – Require Reason on Over/Short]***.



11. Select **OK**. The Count Sheet prints on the local printer. Place it in the till tray.

Adjust count

A privileged user can change one or more Cash Management class totals for the previous count. When making the adjustment, you must select an adjust count reason from a pre-defined list in order to complete the adjustment.

1. Select the function to adjust a count.
2. Highlight the appropriate till (if more than one till is open) and select **OK**.
3. Select the transaction you wish to adjust: Count Class Amount, Count Sheet Reference, or Both.
4. Enter the correct amount for the CM Class and select **OK**.
5. Enter the reason code and select **OK**. No chits or receipts print for this function.

Deposit cash

A privileged user may transfer qualifying funds from the till to a bank deposit. At any point during the till session, you may deposit cash to remove qualifying funds from the till receptacle and place them into an open bank deposit receptacle. These funds will then be eligible for transfer from the bank deposit receptacle to another receptacle or sent to the bank as part of the submitted deposit into an account.

1. Select the function to deposit cash.
2. Highlight the appropriate till and select **OK**.
3. Select the CM Class to be deposited.
4. Highlight the appropriate bank deposit and select **OK**.
5. Enter the amount to transfer from the till to the bank deposit and select **OK**.

Close till

A privileged user can close the till receptacle's tracking session to prevent further activity. In order to close a till, the balance must be zero (0) (unless users have been granted the option to allow closing of a till with non-zero balance). After the till session is closed, you can unassign the till from the cash drawer in the workstation.

1. Select the function to close a till.
2. Highlight the appropriate till and select **OK**.
3. When prompted to confirm the closure, select **Yes**.

General operations

View receptacle status

The Cash Management Status provides summary information for all receptacle sessions.

1. Select the function to view Cash Management status.
2. On the Cash Management Status page, manually refresh the information on the form and print the current status information to a chit if desired.
3. Highlight the appropriate receptacle type from the list (if more than one receptacle session is open) and select **OK**.

Determine till assignment status (smart key)

A smart key determines whether a till has been assigned to the local workstation and directs the user to the next operation based upon the presence of a till.

- If a till is assigned, the smart key will be invoked, prompting the user to sign in to the workstation.
- If a till is not assigned, the smart key will allow the user to assign a till to the cash drawer.

Offline Cash Management capabilities

Most ECM features depend on access to the Cash Management Service on the CAPS workstation. When connectivity to the Cash Management Service is temporarily severed, some offline capabilities automatically start without intervention to allow limited continued Cash Management operation.

Till

When a workstation that supports a cash drawer is offline, you can open a new till and assign/unassign users. These users can perform all normal Cash Management operations on an offline till session, including:

- Add and remove funds from a guest check
- Pull cash
- Adjust starting amount
- Print reports
- Count till
- Close till
- Deposit cash
    - Bank deposits reside on a workstation with Cash Management Service, so an offline bank deposit will be created on the local workstation.

Reconnectivity

Once the local workstation comes back online and is able to communicate with the Cash Management Service on the CAPS machine, all offline till and bank deposit activity performed on the local offline workstation is synchronized with the Cash Management Service.

Safe and bank deposit

When a workstation that supports safe and bank deposit operations is offline, you cannot perform any of these operations from the local workstation. If an Ops Client is available on the CAPS workstation, safe and bank deposit operations may be performed using that Ops Client workstation. If an Ops Client is not available on the CAPS workstation, you must purchase a license for Ops to run on that CAPS workstation.

Property reporting

Property reporting at the workstation provides reports on active and completed receptacle sessions, including the reports listed in the following table.

Report	Description
Safe Report	Provides information about active safe sessions for the property.
Till Report	Provides information about active till sessions that are assigned on the workstation.
Till Banking Report	Provides information about active till sessions for the property.
Count Sheet	Provides a detailed breakdown of the counted units that were entered by the Ops user during a receptacle count. This report is only produced upon saving a receptacle count and cannot be run directly from reporting.
Change Order Request	Provides a detailed breakdown of denomination units that the property requests from the bank to allow cash change to be made for transactions. This report is only produced upon saving a Change Order Request and cannot be run directly from reporting.
Cash Pull Report	Provides a list of previously performed and outstanding cash pulls. Outstanding cash pulls indicate the value required to return to the original till for deposit.
Over/Short Detail Report	Provides a list and information for any over and short conditions that were recorded with counts. This report also includes a detailed breakdown of the Cash Management class to show where the over/short condition is defined.

Enterprise Parameters

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You can use the Enterprise Parameters EMC module to configure EMC security settings and to manage Data Transfer Service (DTS) log files

This article relates to programming of an EMC module.

This article discusses a topic related to **security**.

Contents

- 1 Configuring EMC security
- 2 Configuring mymicros.net
- 3 Configuring miscellaneous settings
- 4 Configuring enterprise parameter services
- 5 Configuring licensing
- 6 See also

Configuring EMC security

1. In the EMC, select Enterprise, select Setup, and then select **Enterprise Parameters**.
2. Enter information on the Login tab for the security settings fields and select the appropriate options.

Field or Option	Description
Hierarchy	This field shows the hierarchy structure ID value of the enterprise. You cannot change this value and it is shown for troubleshooting purposes.
Name	This field shows the name of the enterprise and is used when comparing the transaction database with the reporting databases.
Minimum Password Length	Enter the minimum length of a password.
Require Passwords to Contain Letters and Numbers	Select this option to require that passwords contain both letters and numbers. Configure the following values to comply with Requirement 8 of the PCI Data Security Standard: Minimum Password Length: 8 or greater Require Passwords to Contain Letters and Numbers: Select this option Password Repeat Interval: 4 or 5 Days Until Expiration: Maximum of 90 Password Never Expires: Deselect this option Maximum Allowed Failed Logins: 6 or less No Failed Login Limits: Deselect this option Maximum Idle Time In Minutes: 15 or less No Idle Time Limits: Deselect this option

Password Repeat Interval	Enter the number of times a password must be changed before its reuse.
Days Until Expiration	Enter the number of days until the current password expires.
Password Never Expires	Select this option if you want to set passwords to never expire. This option overrides the **Days Until Expiration** option.
Maximum Allowed Failed Logins	Set the maximum number of failed login attempts before the system locks out an account.
No Failed Login Limits	Select this option to allow a user to attempt to log in unsuccessfully without locking the account.
Maximum Idle Time In Minutes	Enter the maximum amount of time an EMC session can be idle before the system ends the session.
No Idle Time Limits	Select this option to turn off idle time calculations. This option overrides the **Maximum Idle Time in Minutes** option.

Configuring mymicros.net

1. Click the **mymicros.net** tab.
2. Enter information for the following fields and select the appropriate options.

Field or Option	Description
Logs to Keep	Enter the number of Data Transfer Service (DTS) logs to keep.
Error Files to Keep (days)	Enter the number of days the system keeps error file logs.
Verbosity	Set the verbosity level for DTS logging. You should typically set this value to Normal. Set verbose logging to Extended or Super for troubleshooting because these elevated levels create large log files and slow down performance.
mymicros.net Machine Name	Enter the name of the mymicros.net server computer using the format *http://YourMyMicrosUrl*.
Enterprise mylabor URL	If DTS uses a different IP address to connect to the mylabor web service, enter the URL. If you leave this blank, DTS uses the mymicros.net machine name to post mylabor. Workstations do not use this URL. Use the format *http://Name or IP address of the mymicros.net portal server*.
Organization ID	This field represents the enterprise organization ID used for reporting to mymicros.net. Do not change this value unless instructed by your sales representative.
17 - Send selected translations to Simphony Reports	Select this option to send definition translations to Simphony reports. You must also select the **[Send Translations for this Language to Simphony Reports]** option in the Language module for each language to be sent to Simphony reports.

Configuring miscellaneous settings

1. Click the **Miscellaneous** tab.
2. Enter information in the following fields.

Field or Option	Description
SOD Sequencer Machine	Enter the name of the Windows machine that runs the Sequencer Service for Start of Day.
App Server Time Zone	Select the application server time zone. This value serves as a guide when you configure the Playback Control module.
Max Db Sync Requests	Enter the maximum number of simultaneous database sync and download requests. This setting helps control the CPU usage on the application server to prevent the system from becoming overburdened.
New DTS Jobs	This grid lists all jobs handled by the DTS. You can configure the interval in minutes for each job type and view the last time the job was run. You can only edit the Interval column. Set the value to 0 to prevent the job from running.
Purging	This grid lists purged information. You can configure the number of days to keep each record type. You can only edit the Days To Keep column. Set the value to 0 to prevent the information from purging.

Configuring enterprise parameter services

The SIM File Access Services grid is typically empty and should be filled only when the system must read or write multiple properties to the same file. To create enterprise level SIM file access services:

1. Click the **Services** tab.
2. Use the Add and Delete links to create enterprise level SIM File Access Services.
3. In the EMC, select property, select Setup, and then select **Property Parameters**.
4. Click the **Workstations** tab.
5. Select the service to use one of the enterprise SIM File Access Services from the **[SIM File Access Service for this Property]** drop-down list.

Configuring licensing

You can use the Licensing tab to enter license codes for the system when configuring the system for the first time, adding new workstations or KDS displays to the system, or making changes to the application server.

Related Links: Simphony Licensing

See also

- Security category

Family Group

A **Family Group** is a category of menu items. Every menu item belongs to a Family Group.

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

This article discusses the usage of one or more **Function Keys**. (646)

This article discusses general MICROS knowledge and/or **terminology**.

Contents

- 1 Standard Configuration
- 2 EMC Configuration
- 3 Function Key
- 4 See also

Standard Configuration

To understand what a Family Group is, you must first understand a Major Group. A Major Group is a basic category, such as "Food" or "Liquor". A Family Group can be considered a "sub-category" of a Major Group, such as: Appetizer, Salad, Gin, or Vodka.

The view below shows a sampling of a typical database Major/Family Group structure:

- Food
  - Appetizer
  - Salad
  - Dessert
  - Entree
- Liquor
  - Rum
  - Gin
  - Vodka
- Beer
  - Imported
  - Domestic

This is the most typical example of Family Group configuration, however configuration may vary drastically depending on the database and reporting needs. In some databases, Family Groups may be programmed to represent leased outlets so that an accountant can immediately see sales figures for that tenant.

EMC Configuration

Family Groups are configured from the EMC's property scope. In this module, there is not a Form View. The only configurable fields are:

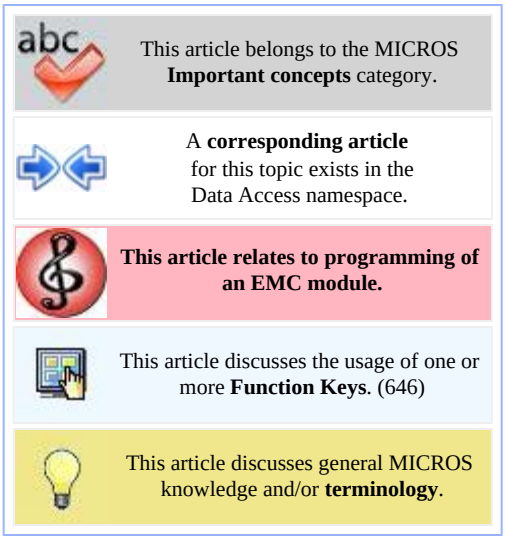
- Object Number
- Name
- Report Group

Function Key

The **[FamGrp Menu Item]** function key (646) can be used to display all Menu Items in a Family Group. When this key is used, the workstation will prompt for the Family Group. After a selection is made, the workstation will list all the menu items that are available in that Family Group (in the form of an NLU window). Note: only items that are available on the current Main/Sub Levels will be displayed.

Family Group

A **Family Group** is a category of menu items. Every menu item belongs to a Family Group.



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See also

- Major Group
- Menu Item
- Report Group

Fast Transaction

A **Fast Transaction** is a transaction that does not require an operator to use a **[Begin Check]** key to start a new transaction. Instead, new transactions can be quickly started simply by pressing a Menu Item key or scanning an item. This functionality is often used in a retail/concession environment where an operator stands in one place and must quickly ring in transactions over and over again. It is also often used for bartenders who ring in many more transactions than a typical food server, and rarely need to assign customers to a specific table or check number.

This article belongs to the MICROS **Important concepts** category.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Enabling
- 2 Serving Totalling
- 3 Related Options
  - 3.1 RVC Parameters
  - 3.2 Operator Options
  - 3.3 Tender Media
  - 3.4 Touchscreens
- 4 Reports
- 5 See also

Enabling

Fast transactions are enabled per Revenue Center by turning on the RVC Parameters General Option #15, **[Allow fast transactions]**. When enabled, all operators can begin fast transactions unless the operator option, **[Cannot perform fast transactions]** is enabled. If **[Allow fast transactions]** is disabled, fast transactions cannot be performed in the RVC.

To begin a fast transaction, the operator just needs to sign in and press any Menu Item key.

Serving Totalling

Each Revenue Center may be programmed to allow fast transactions to be service totalled by disabling the RVC Parameters General Option #16, **[Do Not Allow Service Total of Fast Transactions]**. If a fast transaction is service totalled, it may be picked up and service totalled again, or picked up and closed, just like an ordinary guest check. A fast transaction will not be able to be split into multiple checks if it cannot be service totalled.

Related Options

RVC Parameters

Other options in RVC Parameters affect Fast Transaction behavior.

On-demand customer receipts
: When this option (#9 in General Options) is enabled, customer receipts won't automatically print after each fast transaction. The receipts will only print "on demand", meaning that the customer asks for a receipt. For a full description of this functionality, see On Demand Customer Receipt.

Print "Your order number is: XXXX" at Bottom of Receipts
: When this option (#21 in Format Options) is enabled, the check number will print at the bottom of the customer receipt so that it can be used as an "order number".

Operator Options

Operator options are found in the Employee Class module, but they may be overridden per operator in the Employee Maintenance module. See operator options for more information.

Line-by-line customer receipt
: This is a feature used to print each item as it is ordered. This is used as a security measure — an operator becomes unable to perform voids without having the void show on a receipt. If enabled, the receipt will print each menu item as it is rung up rather than at the end of the transaction. Only one credit card payment may be posted to a line-by-line fast transaction. If multiple payment types are used in a single line-by-line fast transaction (e.g. credit card and cash), the credit card payment must be last. The **[Credit Card Lookup]** function key (625) is used for credit authorization in this type of transaction. The Type Definition for Credit card [Tender] keys must be programmed to either of the following settings: Amount Required, Assume Paid in Full. The latter option is the usual choice for retail operations, in which charged tips and change due generally do not occur.

Tender Media

Print Guest Check Trailer on Fast Transaction Customer Receipt
: Select this option to print the guest check trailer on the customer receipt if this key is used to close a fast transaction. If this option is not selected, the customer receipt trailer prints. This option is unaffected by the setting of the Print Check Trailer option.

Print customer receipt
: This option is used in conjunction with the On Demand Customer Receipt functionality.

Touchscreens

CC Lookup
: Fast transaction operators may rarely need to authorize and finalize in separate steps. The **[CC Lookup]** function key (625) does both steps at once, saving time, and will usually be used for fast transactions.

Reports

Fast transactions report exactly as any other transaction would. The only small exception is printing an “F” for fast transactions in the status field on Employee Closed Check Reports.

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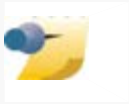

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See also

Guest Checks and Customer Receipts	Add/Transfer Check · Adjust Closed Check · Begin Check · Begin Check for Another Operator · Check Number · Customer Receipt · **Fast Transaction** · Group Number · Guest Check ID · Guest Check · Guest Check Pickup · Life Cycle of a Check · Reopen Closed Check · Reprint Closed Check · Table Number
Learning series: Guest Checks and Customer Receipts	

Financial Report

The term **Financial Report** refers to any report that displays totals and other information relating to finances. Financial Reports can be taken for a Property, Revenue Center, Employee or Cashier; while the scope of the information is different (an RVC Financial Report shows totals for one RVC, but an Employee Financial Report shows totals for only one Employee), the layout and fields are similar for every type of Financial Report. This article will describe the fields on the report and the information used to calculate the values.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses behavior that is important for **Reporting**.

Reports

- **System**
  - shows sales and check information for a property, with a configurable tracking section.
- **Revenue Center**
  - same as the **System Report**, but for a revenue center.
- **Employee** (system/revenue center scope)
  - same as the **System Report**, but for an employee.
- **Cashier** (system/revenue center scope)
  - has no fixed report format, consists entirely of a configured tracking group.
- **Serving Period** (revenue center scope)
  - day part divisions (breakfast, lunch, dinner, etc.). May or may not be time controlled. Only one serving period is active at a time in a revenue center.
- **Time Period Summary** (revenue center scope, flexible report configuration)
  - time parts (each hour of the day, or a configured time frame). Can have multiple time periods and they can overlap. The summary report is a report that shows each time period on a single line with sales information.
- **Time Period Detail** (revenue center scope)
  - time parts (each hour of the day, or a configured time frame). Can have multiple time period and they can overlap. The detail report is a report that shows each time period as a full report, with a similar format to a system financial report (sales, check profiles, and tracking groups).
- **Income Audit** (revenue center scope, flexible report configuration)
  - a completely configurable report that can show the serving period information by revenue center on a single report.

See also

- List of PMC Reports

Format Parameters

Format Parameters is the EMC module that allows the configuration of option bits and other settings that are related to printing of Guest Checks and Customer Receipts, as well as settings that control displaying of items on a workstation's Check Detail Area. This functionality was introduced in Simphony 2.0; in previous versions, the fields from this module were configured in Revenue Center Parameters. This module is zoneable; it can be configured at the Enterprise, in a Zone, in a Property, or in a RVC.

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony 2.0.

This article discusses functionality that relates to **Printing**.

Contents

- 1 EMC Configuration
  - 1.1 Print Output
  - 1.2 Sorting and Display
  - 1.3 Options
- 2 See also

EMC Configuration

The module has a Configuration tab and an Options tab. On the Configuration tab, the settings are divided into "Print Output" and "Sorting and Display" sections.

Print Output

The following four fields relate to Slip Printing. See the Slip Printer article for more information:

- Lines on First Page
- Lines on Other Pages
- Line Feeds Before First Page
- Line Feeds Before Other Pages

There are two other fields in this section:

Minimum Lines Per Roll Check/Receipt
: Some restaurants prefer that guest checks and customer receipts that are printed on a Roll Printer be a minimum length, so that they may be inserted into guest check covers. Enter the minimum number of lines to print on guest checks and customer receipts. Blank lines are added after printing to achieve the minimum.

Number of Guest Check Information Lines
: Enter the number of detail lines (0-30) that can be entered in a SIM dialog box. The detail is stored in the ISL SaveChkInfo command when a new check is begun.

Sorting and Display

These three fields determine how items are sorted. See Sort/Consolidation Methods for more information.

- Screen Sort Type
- Customer Receipt Sort Type
- Check Sort Type

The other field in this section controls NLU and Condiment help sorting:

NLU/Condiment Help Screen Sort Type
: Select a sorting method for NLU screens and condiment help screens. If this field is set to 0, the items will be sorted by Menu Item Master Record number; if this field is set to 1, the items will be sorted alphabetically; if this field is set to 2, the items will be sorted by NLU number.

Options

Options 9, 11, 13, 14, 22, and 34 discuss By-Round Guest Check behavior. See By-Round Guest Check: Format Parameters for more information.
Option 16 discusses Void behavior. See Void: Format Parameters for more information.

The following options are configurable on the Options tab:

1 - Print Unit Price as well as Line Total on Checks
: Select this option to cause menu item unit prices to print on guest checks in addition to the line total. This information may print on a separate line, if the combination of the unit price and the menu item name is too long to print on one line.

2 - Print Check Number Double Wide on Guest Checks and Customer Receipts
: Select this option to cause the Check Number to print in double-wide format on guest checks and customer receipts.

3 - Print Table Number Double Wide on Guest Checks Only
: Select this option to cause the Table Number, if used, to print in double-wide format on the guest check.

4 - Wrap Condiments on Guest Checks
: Select this option to force as many condiments as possible to print together on each line of guest checks and customer receipts. Disable this option to force each condiment to print on a separate line.

5 - Print Trailer Lines on Split Check if On-Demand
: Select this option to print guest check trailer lines on split checks, if the original check from which it was split was an on-demand guest check.

6 - Eliminate Blank Lines from Guest Checks
: Select this option to suppress the printing of any blank lines on guest checks. Blank lines generally print after the header, and before and after the transaction detail. Disable this option to allow blank lines to print.

7 - Print "Closed To" Check Number Double Wide on Memo Guest Check
: Select this option to print the "Closed to" number double-wide on memo checks. The "Closed to" number prints on a memo check when the memo check is tendered. The system uses the next available check number as the "Closed to" number, which is used to record the tender on the journal, in Closed Check reports, and on the memo check itself. Disable this option to print the "Closed to" number in standard width.

8 - Print Stored Credit Cards on Guest Check
: Select this option to print information on the guest check from a credit card that has been stored for recall. This information includes the reference number, expiration date, and cardholder's name. Disable this option to suppress printing of the information on the guest check.

10 - Print Open and Closed Time on Check
: Select this option to print the time opened and time closed on guest checks and customer receipts.

12 - Print Tenders After Summary Totals on Checks and Receipts
: Select this option to cause Tender/Media entries to print after the summary totals (subtotal, tax, amount due, and

change due) on guest checks, receipts, and journals. Disable this option to print the Tender/Media entry before the summary totals.

15 - Print Amount Paid Double-Wide on Guest Check and Receipts
Select this option to cause the Amount Paid field on guest checks, customer receipts, and journals to print in double-wide format. Disable this option to print the field in standard format. If the Amount Paid field uses more than 8 characters (including the decimal point and one character space reserved for a minus sign), the field will print in standard format, even if this option is enabled. For example, 12345.67 represents 9 characters (8 are shown, 1 is reserved for the minus sign). This amount would print in standard format, even if this option is enabled.

17 - Print Tax Exempt Coupon "Tax Forgiven" Amount
Select this option to cause a line to print and display showing the amount of sales tax forgiven when a Tax Exempt Coupon is tendered. This line prints immediately after the Tender entry. Disable this option to suppress printing of this line.

18 - Do Not Print Revenue Center Name Line in Journal Entry Headers
Select this option to suppress the journal printing of the line that contains the name of the Revenue Center.

19 - Display an "E" In Customer Display if Exempt
Select this option to cause an E to appear in the customer display if tax is exempted. If the number in the customer display is large enough to require the space used by the E, the number overwrites the E. Disable this option to suppress the E.

20 - Partial Cut between Customer Receipts on Autocut Roll Printers
Select this option to cause autocut Roll Printers to partially cut (perforate) the roll printer paper between customer receipts. Do not select this option to cause the autocut printer to perform a full cut between customer receipts.

21 - Print "Your order number is
XXXX" at Bottom of Receipts: Select this option to print a banner at the bottom of customer receipts that displays the check number. The order number (check number) displays in double-wide format. The banner prints in red on roll printers equipped with 2-color ribbons.

23 - Print SKU or UPC Number
This option is active if the **[MI SKU Entry]** function key (643) key or Barcode NLU is used to enter menu items. Select this option to print the SKU number or UPC number on the line above the menu item on guest checks, customer receipts, and the journal (similar to the manner in which a Reference Entry is printed). This number is also saved as a reference entry in the transaction detail. Disable this option to suppress printing of the SKU or UPC number.

24 - Skip Blank Lines When Printing or Displaying Guest Check Info Lines
Select this option to suppress the printing of any blank Guest Check Information lines on guest checks. Disable this option to allow blank Check Information Lines to print.

25 - Do Not Display Guest Check Info Lines on Workstation
Select this option to prevent Guest Check Information Detail Lines from appearing on the display. Disable this option to display Guest Check Information Lines.

26 - Print Guest Check Info Lines Before Header on Guest Checks
Select this option to print guest check information detail lines before the guest check header. To suppress printing of the detail lines, do not select this option.

27 - Print Guest Check Info Lines After Header on Guest Checks
Select this option to print guest check information detail lines after the guest check header. To suppress printing of the detail lines, do not select this option.

28 - Print Guest Check Info Lines After Trailer on Guest Checks
Select this option to print guest check information detail lines after the guest check trailer. To suppress printing of the detail lines, do not select this option.

29 - Enable Team Checks / Use Team Information on Guest Check
Select this option to allow Team Checks, and to display Team Member IDs on the guest check. Disable this option to prevent Team Checks from being used.

30 - Print "Payment" Line on Guest Check
Select this option to print the "Payment" line on the guest check, as specified in the Check Summary Descriptors module. Disable this option to suppress this information.

31 - Print Fixed Price Meal Courses on Guest Check
Select this option to suppress the printing of non-priced Fixed Price Meal course selections on guest checks. Disable

this option to print these selections on the guest check. Upcharges will always print on the guest check, regardless of this setting.

32 - Don't Center Header and Trailer Printing
Select this option to have headers and trailers on guest checks print from the left margin. Disable this option to have headers print centered. This option also applies to Customer Receipt Headers and Training Headers, but not to CC Voucher Headers/Trailers.

33 - Don't Print Check Open Time on Customer Receipts
Select this option to suppress printing of the check open time on the customer receipt.

35 - Hide Previous Round Condiments on Display
Select this option to hide the previous round's condiments and display only the parent menu item. This option may be used in conjunction with the **[Display/Hide Condiments]** function key (648).

36 - Allow Tender/Media to Print 2 Guest Checks and Receipts
Select this option to print two guest checks or receipts when any Tender/Media key with the option, {{fk|Print 2 Guest Checks/Receipts{{ is used. Also, enabling this option allows the workstation to prompt for Two Guest Checks when the Tender/Media option **[Prompt for 2 Guest Checks/Receipts]** is enabled.

37 - Print Guest Check and Receipt Header in Red
Select this option to print the guest check and receipt header in red on printers with a two-color ribbon. On thermal printers, this option causes the header to print in inverse.

38 - Print Guest Check and Receipt Trailer in Red
Select this option to print the guest check and receipt trailer in red on printers with a two-color ribbon. On thermal printers, this option causes the trailer to print in inverse.

39 - Display Other Team Members' Detail
Enable this option to display the detail posted by all team members on the workstation when the check is picked up.

40 - Display Guest Information on Workstation
Enable this option to display the event ID, guest's name, and phone number in addition to the transaction detail on the workstation when the check is picked up.

41 - Print Team Member Names on Guest Check
Enable this option to print the server's names from the team who served the table to the guest check.

42 - Print "***OFFLINE***" on Offline Guest Checks and Receipts
Select this option to enable the printing of the text, **`***OFFLINE***`** on guest checks and customer receipts when the workstation is working on Offline Mode. Disable this option to suppress the printing.

45 - Sort Current Round Condiments on Screen
When this option is enabled, the workstation check detail area will actively sort condiments while they are ordered. Condiment sorting will occur when the items are in different print groups and the parent allows condiments to be sorted.

See also

- Parameters
- Simphony 2.0

Fusebox Payment Card Driver Configuration Guide

General Information

About This Document

This document provides the steps necessary to implement the Fusebox by Elavon payment card driver for use with MICROS Simphony v2.6.

The Simphony payment configuration settings are dependent on the third party payment card software which the property is using ($$$ on the Net, CAPMS, Fusebox, or VisaD).

All aspects of the payment card driver configuration are maintained in the Enterprise Management Console (EMC) module within Simphony.

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Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version	Comments
Rev A	October	2012	2.5.0	Configuration introduced with Simphony v2.5.
Rev B	July	2013	2.5.3	Updated document with instructions for new loadable payment driver, available with Simphony v2.5 MR3. Added Professional Services Procedures for Distributing Third Party Credit Card Driver Package (Appendix A).
Rev C	January	2014	2.6.0	Updated document for v2.6. The Third Party Credit Card Driver Package procedures were moved to a stand alone document as they can be utilized by all third party payment card drivers.

Contents

To help you navigate the document, information is organized in sections and displayed in the following sequence:

Who Should be Reading This Document 4

What the Reader Should Already Know 4

Installation Procedures 5

Simphony Setup Procedures 8

Who Should be Reading this Document

This document is intended for the following audiences:

- MICROS Installers/Programmers/System Test Associates
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of POS terminology and concepts
- Working knowledge of the Microsoft Windows interface
- Understanding of basic network concepts

Installation Procedures

Communication Methods

With the Fusebox payment card driver for Simphony, there are two communication methods in which credit card processing can be implemented: ProtoBase hosted solution via Virtual Private Network (VPN) or Fusebox solution via stunnel. Each method is described below.

- ProtoBase Hosted Solution via VPN
  - With this communication method the Fusebox driver will communicate to the ProtoBase Hosted Solution via an established VPN. At a minimum, two (2) VPN's must be established. The first must be defined between the individual property and the ProtoBase Hosting Center. Installation and configuration of a VPN appliance will be required to establish this connection. This connection will be used to process authorizations. Please contact an Elavon representative for details about required actions for this implementation.

    The second is a VPN appliance that resides at the MICROS Hosting Center and will be utilized to process all settlements (batching) for the property. If multiple properties exist within an organization, a single VPN connection should be allowed. Please consult with an Elavon representative for details.

    For any premise based implementations, a single VPN can accommodate both authorization and settlement traffic.

    This method is required for those organizations that must utilize the legacy ProtoBase application. It is strongly recommended that the property utilize the Fusebox solution when possible.

- Fusebox Solution via stunnel
  - The Fusebox application (Next Generation Hosted Solutions from Elavon) utilizes the stunnel application as a secure TCP connection between the property and the Elavon Hosting Center. This secure connection is used for authorizations and to communicate between the MICROS Hosting Center and Elavon

Hosting Center for settlements. Stunnel is a small application that uses a certificate to establish an SSL connection, and can be implemented via CAL. Instructions on implementing stunnel are included in the next section.

stunnel Installation

Simphony utilizes a version of the stunnel application to communicate with the Fusebox Hosting Center. stunnel can be installed on one machine (single host location) at the Enterprise level, or on each individual terminal at a property to allow for individual connectivity to Fusebox by Elavon.

A copy of stunnel must be installed at the Simphony Hosting Center to perform all batching activities.

Installation of the stunnel at the Property level can be performed in one of two ways:

- Single Host location installation
    - Use the single host location installation method for Simphony Hosting Center installations or for properties that want to perform all payment card activity from a single machine. Configuration details are found on page 17.
- Via CAL package to each terminal
    - Use the CAL package installation for properties that want to have stunnel installed on each terminal, and perform payment card activity from multiple terminals. Configuration details are found on page 11.

Complete the appropriate instructions below based on the type of installation (Single Host Location or CAL Package Installation).

Single Host Location Installation

You will need the Simphony v2.6 installation CD to perform the instructions in this section.

1. From the root of the Simphony v2.6 installation CD, navigate to **Install | Simphony2 | Tools | FuseboxSTunnel**.

2. Double-click '**stunnel.exe**'. stunnel will automatically install the proper files under Program Files | Fusebox | stunnel; it will install as a service, and the service will be set to automatically start.

3. Proceed to the section titled *Simphony Setup Procedures*.

CAL Package Installation

1. Open the EMC application in Simphony and log in.

2. In the Locations hierarchy, highlight the Enterprise module.

3. Navigate to **Setup tab | CAL Packages**.

4. Expand the Simphony tree and highlight **Fusebox STunnel**.

5. From the Deployment Schedules tab, click the '**Add Deployment**' link.

6. On the *Select Properties* dialog, either select a property from the list or select Service Host.

7. Save your changes.

Simphony Setup Procedures

Before You Begin

Before configuring the Fusebox payment driver, the following should be noted:

- Fusebox stunnel) must be installed by the Hosting Center, or the VPN appliance must be implemented and tested (if applicable).
- S*i*mphony v2.6 must be installed at the property along with the VPN appliance (if applicable).
- You must have access to the EMC module within Simphony.
- Any custom payment or device drivers that will be utilized must have been implemented. Please refer to the *Guide to Distributing Third Party Credit Card Driver CAL Packages* for instructions.

EMC Configuration

Overview

This section provides instructions to configure the following payment card driver for use with Simphony v2.6:

- Fusebox by Elavon

All aspects of the payment card driver configuration are maintained in the EMC module within Simphony. You will need to configure the payment card driver and payment card module, and then configure the screen/button design for Front of House (FOH) usage.

Payment Driver Configuration

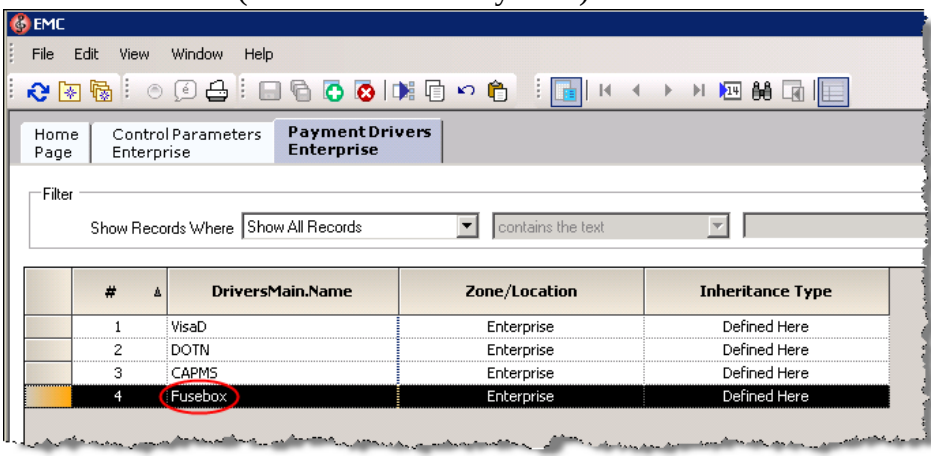
Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.

2. Navigate to **Setup tab | Payment Drivers**.

3. Add a new record for the Fusebox driver using the green Insert Record button (if it does not already exist).



4. Open the new driver, and then click the link called '**Import from a file**'.

5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**FuseboxPayment.dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:

Assembly/Class	
Assembly Name	FuseboxPayment.dll
Category And Type	
Class Name	Micros.Payment.CreditCardDrivers.FuseboxPaymentD
Description	**Fusebox Payment Driver**
Display Name	**Elavon**
Driver ID	**Fusebox**

- **Description -** This value describes the Payment Driver.
- **Display Name -** This value appears in the Driver display drop-down list.
- **Driver ID -** This is for internal use only. Use '**Fusebox**' unless instructed otherwise.

Common Driver Properties

9. In the Common Driver Properties section, enter information in the following fields:

Common Driver Properties	
Bank Identification Number	**1**
Batch Number	**1**
Merchant Number	**1**
Store Number	**1**
Terminal Number	**1**

- **Bank Identification Number -** This value cannot be 0 (zero) or empty. Set to '**1**'.
- **Batch Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.
- **Merchant Number** - This value cannot be empty. Set to '**1**'.

- **Store Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.

- **Terminal Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.

Transport Service Properties

10. In the Transport Service Properties section, enter information in the following fields:

Transport Service Properties	
Batching Host	[IP Address where stunnel is intalled in Hosting Center]
Batching Host Port	10001
Host Timeout	30
Primary Host	[127.0.0.1 or IP Address of single terminal at Property]
Primary Host Port	10001

- **Batching Host** - The IP Address of the machine where the stunnel application is installed if using the Fusebox solution. If using ProtoBase, this will be the IP Address of the ProtoBase Hosted Solution that is provided by the Elavon representative for settlement transactions.

- **Batching Host Port** - The default port is '**10001**' for Fusebox. Please consult an Elavon representative for the ProtoBase Hosted Solutions port number for settlements.

***Note**: If a different port number is required, manual adjustment of the stunnel configuration is required.*

- **Host Timeout** - This value cannot be empty. The recommended value is '**30**' seconds. Setting this value to '**0**' (zero) will equal no timeout.

- **Primary Host** - The IP Address of the machine that runs the stunnel application. (Please refer to the stunnel installation method on page 6.)

- If stunnel is installed per terminal, use '**127.0.0.1**' (typical).
- If stunnel is installed on a single terminal at the property, leave this field blank.
- If using ProtoBase, enter the IP Address of the ProtoBase Hosted Solution as provided by the Elavon representative for authorizations.

- **Primary Host Port** - Port of the machine for Primary Host above. The default port is '**10001**' for Fusebox. Please consult the Elavon representative for the ProtoBase Hosted Solution port for authorizations.

***Note**: If a different port number is required, manual adjustment of the stunnel configuration is required.*

Elavon Driver Properties

11. In the Elavon Driver Properties section, enter information in the following field:

Elavon Driver Properties	
Chain Code	**[Obtain this value from Elavon]**
LocationName	**[Obtain this value from Elavon]**
TerminationID	**[Obtain this value from Elavon]**
TransactionInquiryRetryDelayTimeoutMS	**5000**

- **TransactionInquiryRetryDelayTimeoutMS** - After a communication failure with Fusebox, Simphony will send an inquiry to Fusebox to discover the cause of failure. This value is the amount of time Simphony will wait before sending this request when such a failure occurs. The recommended value is '**5000**'.

12. Save your changes and close the Payment Drivers Enterprise tab.

Payment Device Configuration

In most cases the payment module will use devices (e.g., MSR, RFID) that are supported using the internal drivers for the input of payment card information. If this is the case, you may skip to the next section.

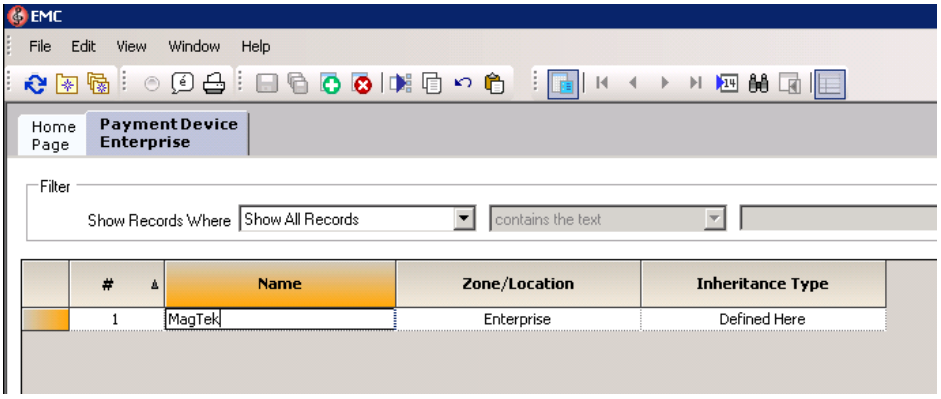
If the payment module will be utilizing a physical input device (MSR) that is not already supported as part of the Simphony POS, a custom device driver may have been created. A third-party device driver will be required to allow communications between the physical device and Simphony. Configure the device driver using the following instructions.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.

2. Navigate to **Setup tab | Payment Device**.

3. Add a new record for the device driver using the green Insert Record button (if it does not already exist).



4. Open the new driver, and then click the link called '**Import from a file**'.

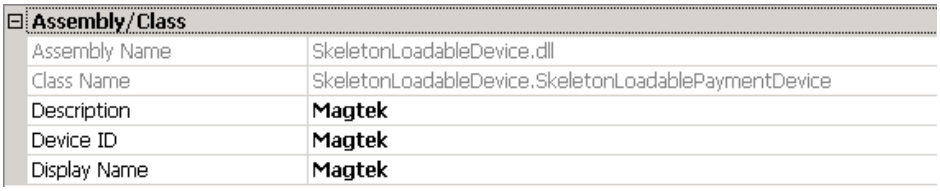
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**[3rdpartyprovider].dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:



Assembly/Class	
Assembly Name	SkeletonLoadableDevice.dll
Class Name	SkeletonLoadableDevice.SkeletonLoadablePaymentDevice
Description	**Magtek**
Device ID	**Magtek**
Display Name	**Magtek**

- **Description -** This value describes the Device Driver.
- **Device ID -** This is for internal use only. It is recommended that this value match the device (e.g., Magtek350M).
- **Display Name -** This value appears in the Device display drop-down list (e.g., MagTek).

9. Save your changes and close the Payment Device Enterprise tab.

Payment Module Configuration

Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Payments**.
3. Click the Credit Card payment record to open. If a payment record for Credit Cards has not been created, add it using the green Insert Record button.
4. Click the link called '**Import from a file**'.
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**Micros.Payment.LoadableCreditCardModule.dll**'.
6. Click the '**Open**' button.

7. Select the **Driver** from the drop-down list. If a payment driver was created in the previous steps, the display name of the driver will be shown here.

8. Select the **Device** from the drop-down list. This will default to '**Internal**', which is the value to use for all MICROS devices. If a device driver was created in the previous steps, the display name of the driver will be shown here.

9. Click the '**Configuration**' tab.

Common Properties

10. In the Common Properties section, enter information in the following fields:

Common Properties	
Allow Manual Authorization Credit Card	**True**
Allow Partial Settlement On Batch	**False**
Data Lifetime Seconds	**7200**
Default UI Element	
Do Not Batch	**False**
Encrypt Data	**True**
Log Level	**ALWAYS**
Manual Card Data Entry Retries	**5**
Offline Authorizations	**0**
Prompt For Manual Card Data Entry	**True**
Retry Authorization Reversals On Batch	**False**
Run As Service	**False**

- **Allow Manual Authorization Credit Card** - This indicates whether manual authorization of credit cards is allowed. Must be set to '**True**' for processors using the Elavon driver.
- **Allow Partial Settlement On Batch** - Must be set to '**False**' for Fusebox.
- **Do Not Batch** - Determines if the creation and settlement of the Batch will be performed within Simphony. Must be set to '**False**' for Fusebox.
- **Encrypt Data** - Must be set to '**True**' for Fusebox.

- **Manual Card Data Entry Retries -** This indicates the number of manual card retries that will be allowed. Must be set to at least '**1**'. Recommended value of '**5**'.
- **Offline Authorizations** - This indicates the number of offline authorizations allowed before the system will attempt to go online.
- **Prompt For Manual Card Data Entry** - This indicates whether manual card entry is allowed. Must be set to '**True**' for Fusebox.
- **Retry Authorization Reversals On Batch** - Must be set to '**False**' for Fusebox.
- **Run As Service** - Must be set to '**False**' for Fusebox.

11. Save your changes and close the Payment Enterprise tab.

Property/Revenue Center Level Configuration

Configuration settings that are unique to the individual property or revenue center can now be defined.

1. In the Locations hierarchy, highlight the Property module.
2. Navigate to **Setup tab | Payment Drivers**.
3. Double-click the '**Fusebox**' **driver** row to open.
4. Click the '**Override this record**' link, and then click the '**Yes**' button.
5. Click the '**Configuration**' tab.

Transport Service Properties

6. If stunnel is installed on a single terminal at the property, enter information in the following field. (Please refer to the stunnel installation method on page 6.) The same applies for the VPN connection from the property.

Transport Service Properties	
Batching Host	[IP Address where stunnel is intalled in Hosting Center]
Batching Host Port	10001
Host Timeout	30
Primary Host	[127.0.0.1 or IP Address of single terminal at Property]
Primary Host Port	10001

- **Primary Host** - The IP Address of the machine that houses stunnel for Fusebox implementation, OR the IP Address for authorizations to the ProtoBase Hosted Solution.

Elavon Driver Properties

7. In the Elavon Driver Properties section, enter information in the following fields:

Elavon Driver Properties	
Chain Code	[Obtain this value from Elavon]
LocationName	[Obtain this value from Elavon]
TerminationID	[Obtain this value from Elavon]
TransactionInquiryRetryDelayTimeoutMS	5000

- **Chain Code** - Assigned by Elavon, this number is a six-character alphanumeric code assigned at the chain level and used for key management in gateway environments.

***Note**: The Chain Code is utilized with Fusebox only (not used with ProtoBase).*

- **LocationName** - Location Name or Source IP Address field is required to be passed from the POS and must be configurable per location. This value must be passed on every transaction, and can be the Location Name or Fusebox terminal and may be empty. However, an Elavon supplied name or IP Address may be given

to properties. It is an alphanumeric value and is 16 characters maximum.

***Note**: The Location Name is utilized with Fusebox only (not used with ProtoBase).*

- **TerminationID** - This is the terminal code used for credit cards and is assigned by Elavon for the property.
- **TransactionInquiryRetryDelayTimeoutMS** - After a communication failure with Fusebox, Simphony will send an inquiry to Fusebox to discover the cause of failure. This value is the amount of time Simphony will wait before sending this request when such a failure occurs. The recommended value is '**5000**'.

8. Save your changes and close the Payment Drivers tab for your current level in hierarchy.

Configure Autosequence

The PC Autosequence feature may optionally be used to set up automatic event tasks, such as nightly batching. Once the PC Autosequence event has been created, it can be scheduled to run repeatedly at specific frequencies or time intervals.

Create Autosequence Event

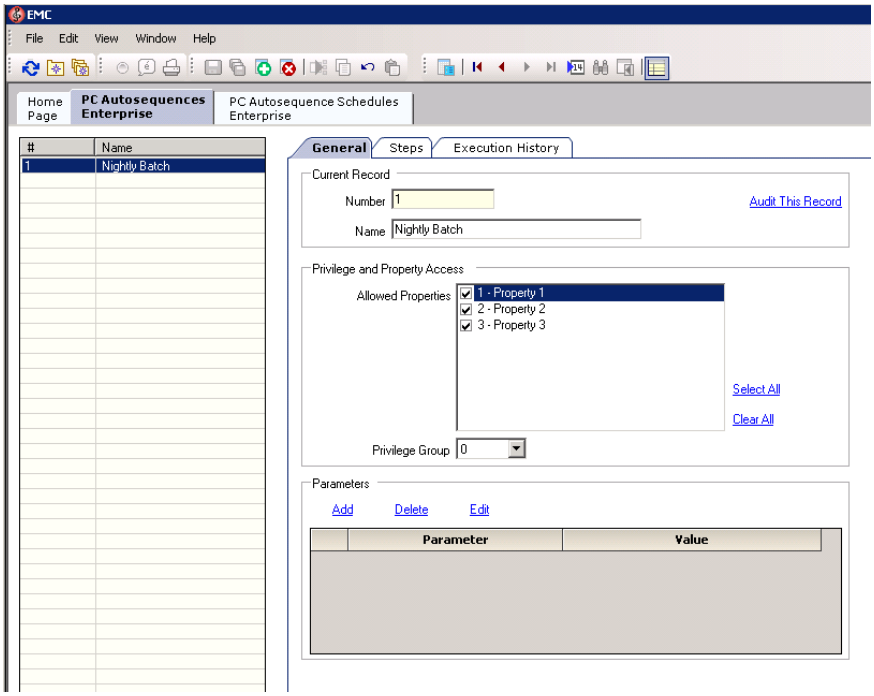
Autosequences may only be configured at the Enterprise level.

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Configuration tab | PC Autosequences**.
3. Add a new record for the autosequence event using the green Insert Record button (if it does not already exist).
4. Double-click on the row to open the new autosequence record.

5. Click the '**General**' tab.

Privilege and Property Access

6. In the Privilege and Property Access section, select information for the following fields:



- **Allowed Properties** - Check (enable) each property that is to be included in the autosequence event run.
- **Privilege Group** - If desired, select the employee group that will be granted privileges to run the autosequence event.

Parameters (optional)

To optionally restrict the execution of the autosequence event, complete the steps in the section below.

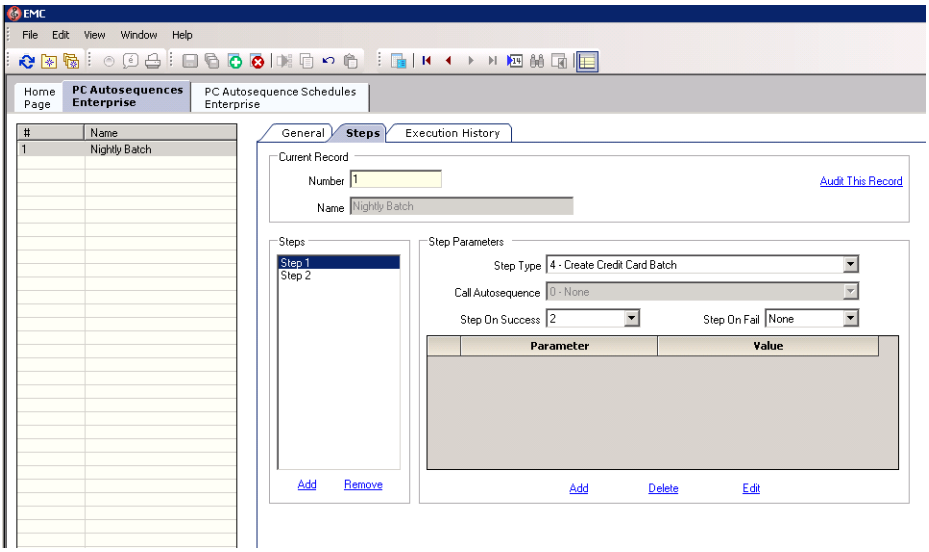
7. In the Parameters section, click the '**Add**' link.

8. Add the desired parameter(s) with values.

Autosequence Event Steps

9. Click the '**Steps**' tab.

10. Under the Steps section, click '**Add**' to add step 1 of the autosequence event.



11. In the Step Parameters section, select the **Step Type** from the drop-down list.

12. Under the Steps section, click '**Add**' again to add step 2 of the autosequence event.

13. Select the **Step Type** from the drop-down list.

14. Repeat to add each step required to run the autosequence event.

15. For each step, select the outcomes:

- **Step on Success** - Select the step number that should occur next if a step succeeds. For example, after step 1 runs successfully, then proceed to step 2.
- **Step on Failure** - Select the step number that should occur next if a step fails. For example, if step 1 fails, do not proceed with any other steps.

16. Once all steps have been added, save your changes and close the PC Autosequences Enterprise tab.

PC Autosequence Schedules

17. In the Locations hierarchy, highlight the Enterprise module.

18. Navigate to **Configuration tab | PC Autosequence Schedules**.

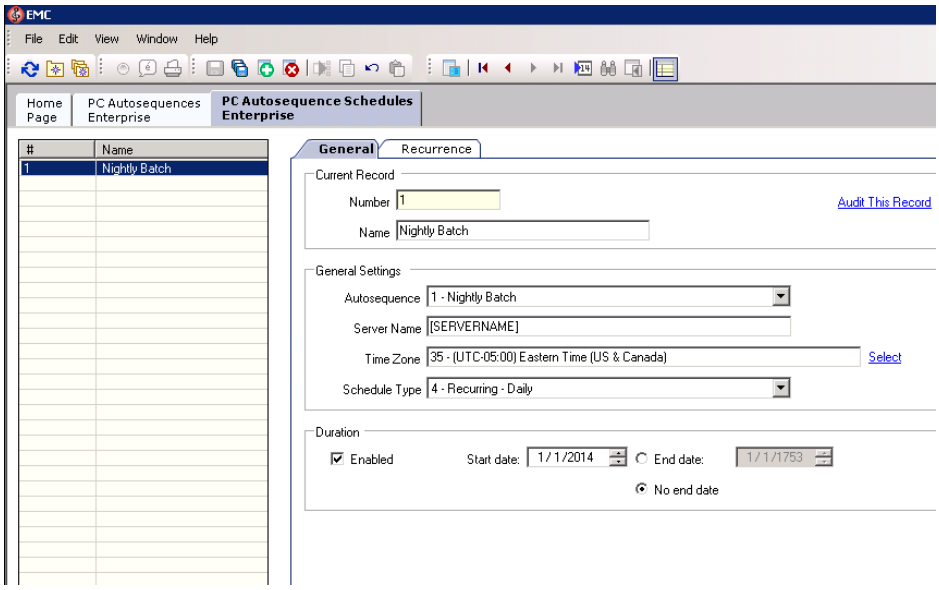
19. Add a new record for the autosequence schedule using the green Insert Record button (if it does not already exist).

20. Double-click to open the new autosequence schedule record.

21. Click the '**General**' tab.

General Settings

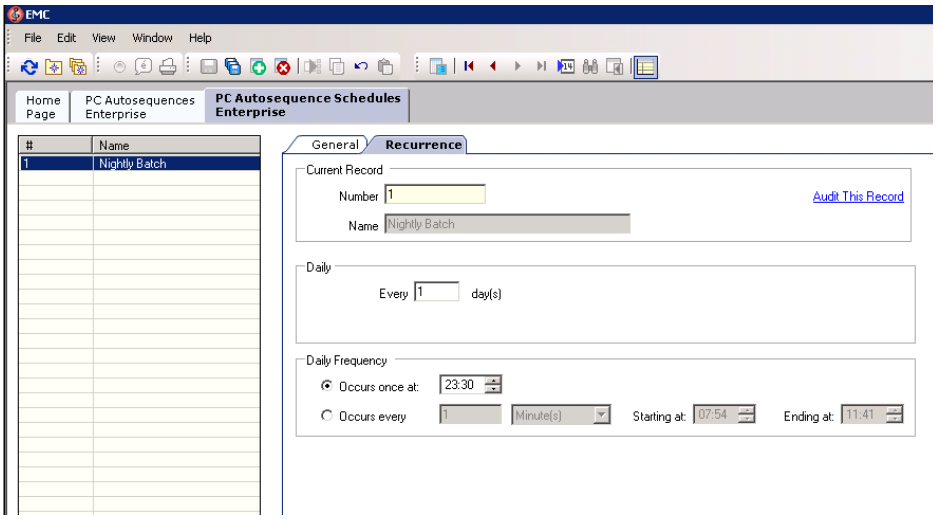
22. In the General Settings section, select information for the following fields:



- **Autosequence** - Select the desired autosequence event from the drop-down list.
- **Server Name** - Enter the name of the server located at the Hosting Center.
- **Time Zone** - Select the time zone of the Hosting Center.
- **Schedule Type** - Select the frequency for the autosequence event.
- **Duration** - The '**Enabled**' box must be checked in order for the autosequence event to run. Also, select the Start and End dates for the autosequence event.

Recurrence

23. Click the '**Recurrence**' tab.



24. In the Daily section, enter the number of day(s) for the autosequence event to reoccur. For example, to run the event daily, set this value to Every 1 day(s).

25. In the Daily Frequency section, set the time(s) for the autosequence event to run.

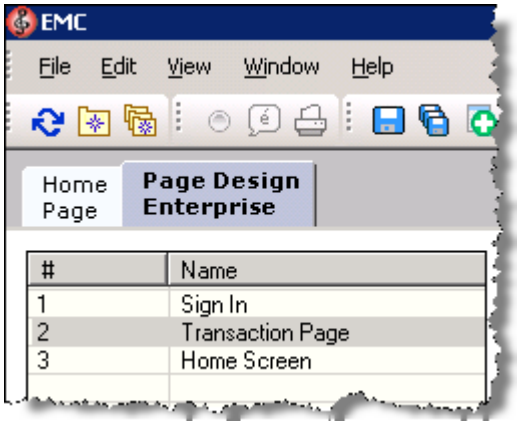
26. Save your changes and close the PC Autosequence Schedules Enterprise tab.

Screen Design Configuration

The instructions below explain how to set up the FOH screen and button(s) for use with the payment card driver.

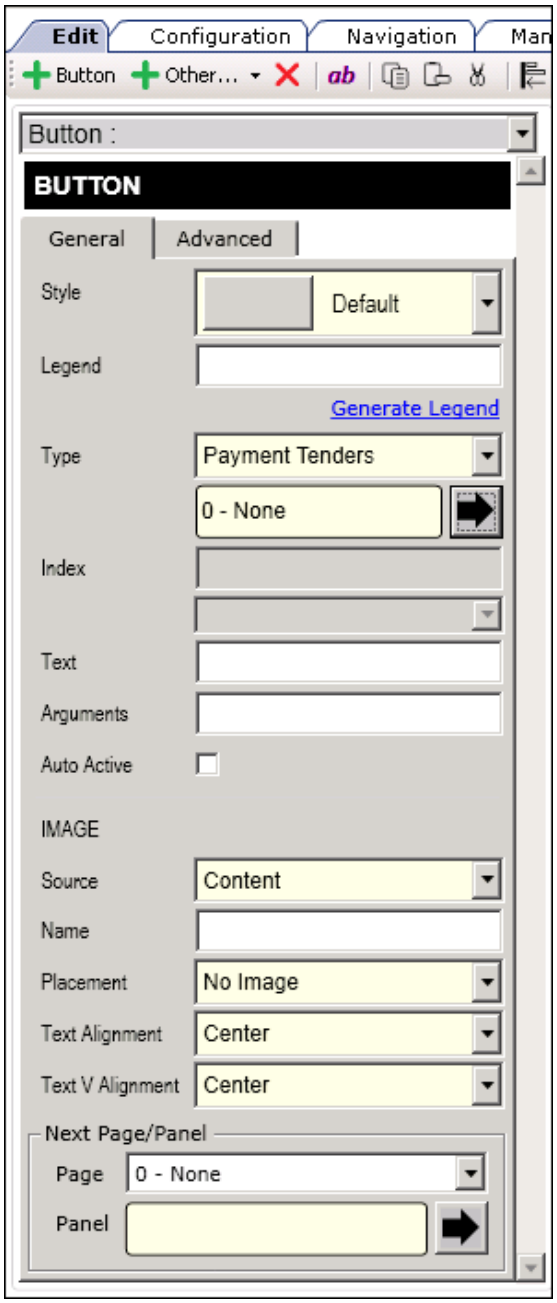
1. Open the EMC application in Simphony and log in.
2. Highlight the Enterprise module.
3. Navigate to **Configuration tab | Page Design**.
4. Double-click the row of the desired page/screen to open it.

***Note**: The screenshots below depict a Transaction Page as the example. Your system will likely have a different page or screen name for the buttons.*



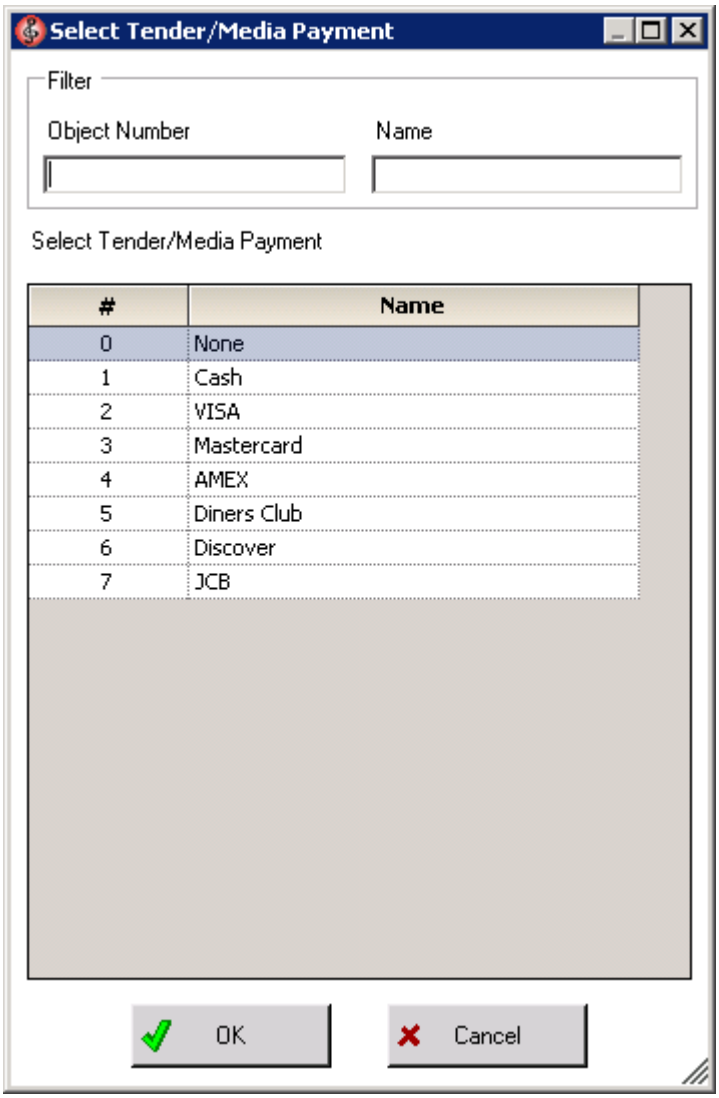
5. On the Edit tab, click '**Payments**'.
6. Click the Insert (+) button.

7. In the General tab select '**Payment Tenders**' from the Type drop-down.



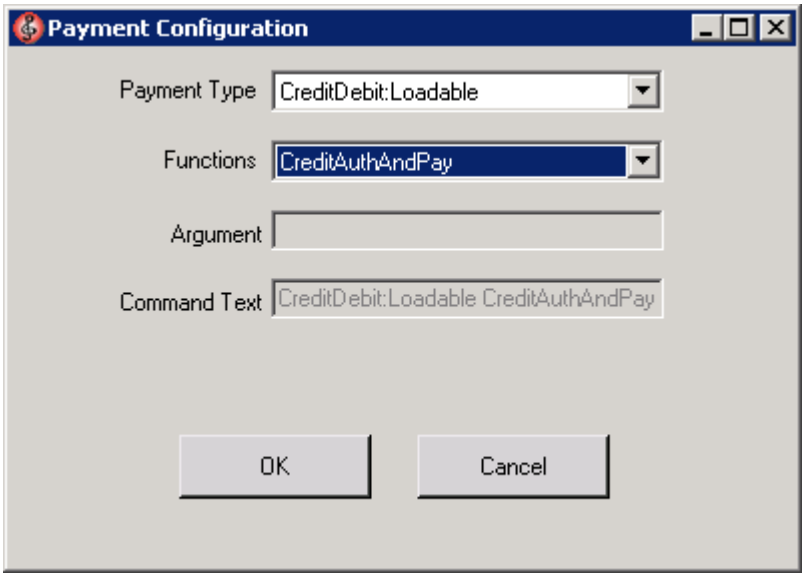
8. Directly under the Payment Tenders drop-down, click the black arrow.

9. On the *Select Tender/Media Payment* window, select '**None**' or the desired payment tender, and then click the '**OK**' button.



***Note**: If you want all types of credit cards to be used, select 'None'. Otherwise, select the desired payment tender and repeat steps 9-13 for each type of payment tender.*

10. On the *Payment Configuration* window, select '**CreditDebit:Loadable**' for the Payment Type and your desired function in the Functions drop-down list. Click the '**OK**' button.



11. Position and size the button wherever you want to place it on the FOH screen.

12. In the Legend field, type the name of the button.

13. Repeat for any additional supported functions.

14. Save your changes and close the Page Design Enterprise tab.

15. Restart the Ops client(s) in order for the screen design changes to display on the workstation(s).

Guest Check

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses functionality that relates to **Printing**.

A **Guest Check** is a record of all sales on a check, from the customer's first order to final payment. Guest Check detail entries include menu items, discounts, service charges, voids, returns, and tender/media entries. A guest check prints (when enabled) for any transaction that is not a Fast Transaction:

- When a check is begun by a **[Begin Check]** or **[Begin Table]** function key; when printed, this is a Guest Check
- When a Fast Transaction is begun but service totaled; after being picked up again and printed, this is a Guest Check
- Any check, after being service totaled; this is a Guest Check
- See the Guest Check Pickup page for some more details.

Terminology

The term "check" is sometimes used to describe both guest checks and customer receipts. In generic use of the term, "check" means "transaction", but it should be noted that there is a difference between customer receipts and guest checks.

Guest Check Pickup

For the Tender Type "Pickup", see Pickup and Loan

The term **pick up a guest check** means that an operator has signed in to a workstation and he/she is going to access a guest check that was already service totaled. Operators service total checks when a service round is complete; the guest check is then "picked up" when the operator wants to perform more operations on the check.

This article belongs to the MICROS **Important concepts** category.

This article discusses the usage of one or more **Function Keys**. (402, 403, 404-421, 436, 439)

Contents

- 1 Function Keys
- 2 See also

Function Keys

There are several function keys that can be used to pick up guest checks. In fact, there are so many functions that the EMC's Key Function Select dialog (shown on the right) has its own category for this: Check Begin/Pickup. To use any of the keys listed below, the key must be programmed on the operator's Default Transaction Screen.

402 - Pickup by Number
: This key is used to pickup a check in the current Revenue Center, using the check number.

403 - Pickup Check#, RVC?
: This key is used to pickup a check using the check number, from one of the eight Revenue Centers assigned to the workstation.

404-411 - Pickup, Check#, RVC 1-8
: These eight keys are used to pickup a check using the check number, from one of the specific Revenue Centers assigned for the workstation, as programmed in EMC. For instance, if the **[Pickup, Check#, RVC 2]** function key (405) is used, the workstation will pick up the

check from the RVC #2 specified for the workstation.

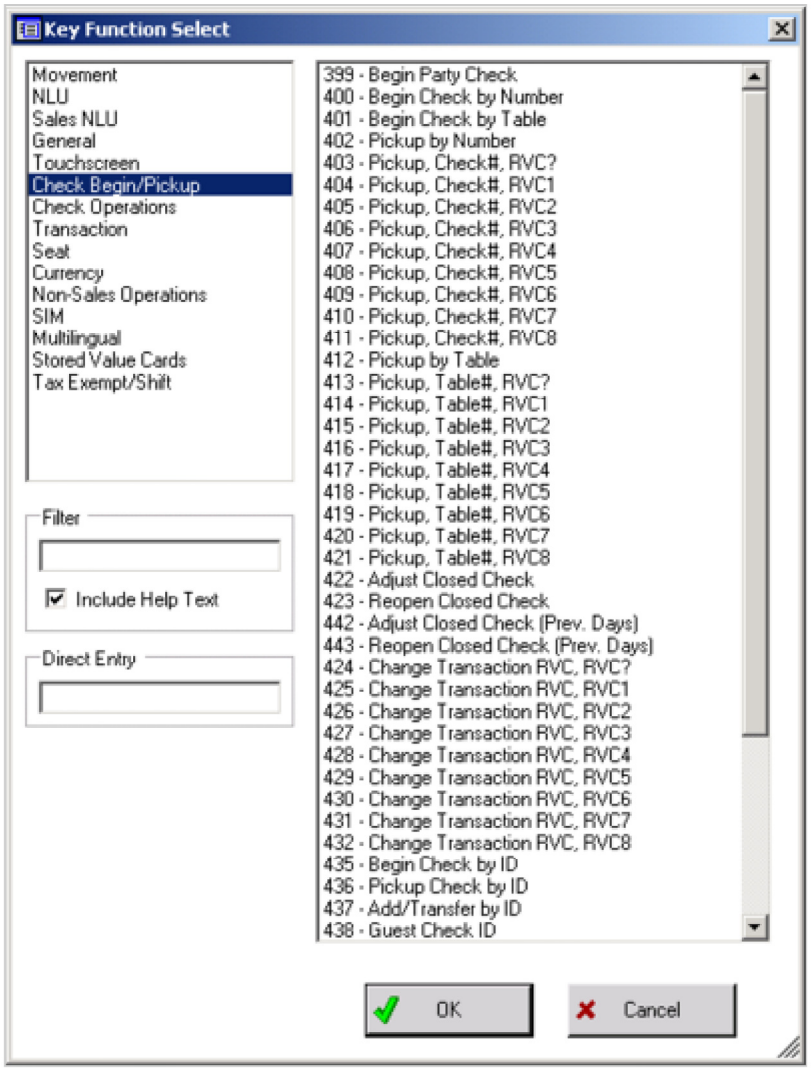
412 - Pickup by Table
This key is used to pickup a check in the current Revenue Center, using the Table Number or Table ID.

413 - Pickup, Table#, RVC?
This key is used to pickup a check using the Table Number or Table ID, from one of the eight Revenue Centers assigned to the workstation.

414-421 - Pickup, Table#, RVC 1-8
These eight keys are used to pickup a check using the table number, from one of the specific Revenue Centers assigned for the workstation, as programmed in EMC. For instance, if the **[Pickup, Table#, RVC 2]** function key (415) is used, the workstation will pick up the check using a table number from the RVC #2 specified for the workstation.

436 - Pickup Check by ID
This key is used to pickup a check by ID.

439 - Pickup Check SLU
This is the most popular form of picking up checks. This key will show all the accessible open checks on the touchscreen SLU; the user can then simply pickup the check by picking the appropriate check from a list.



The Touchscreen Design module with the Check Begin/Pickup keys shown in the Key Function Select dialog.

Help Screen

A **Help Screen** is a window that displays on a workstation to show information to the user. In Simphony, help screens have the ability to link to an HTML file or a URL. The URL feature is optimal for companies that would like standardized help screens throughout multiple properties. Content for this feature can be customized to the company's needs and can contain information such as a drink recipe file for bartenders, a daily specials file for servers, or a link to the corporate intranet. This feature is especially useful for employees in training or employees who are having difficulty conducting a procedure.

This article relates to programming of an EMC module.

This article discusses the usage of one or more **Function Keys**. (301)

The URL and HTML Help Screen features were introduced in Simphony 1.0.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

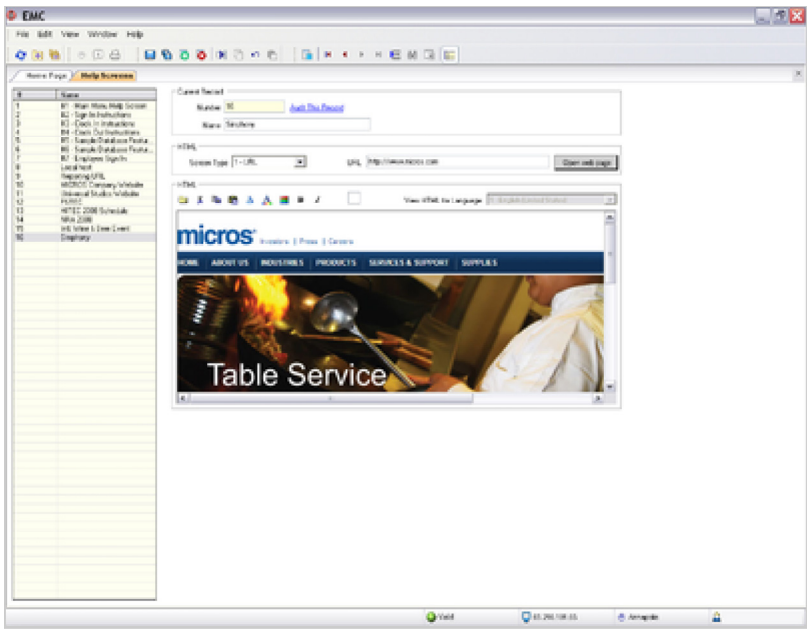
- 1 EMC Configuration
  - 1.1 Linking to a URL
  - 1.2 HTML Content
  - 1.3 Standard Text
  - 1.4 Creating a Topic List
- 2 Workstation Operations

EMC Configuration

In the Touchscreen Design module of the EMC, the **[Help]** function key (301) should be added to a touchscreen. This function key displays the Default Transaction Help Screen as programmed in Property Parameters. Help Screens themselves are programmed from the property scope of the EMC, under the "Property" header. In this module, Help Screens can be linked to a URL or saved as HTML, in addition to providing plain text messages.

Linking to a URL

To point to a URL, simply enter the website address in the URL field. To test the URL for validity, click "Open web page." ***Note:*** *To access URLs, workstations must be able to*



An image of the micros.com website, opened after using the "open web page" button to test the URL's validity.

access the Internet or must be connected to a local intranet.

HTML Content

By selecting HTML as the screen type, the text box enables and allows free text entry. HTML files can be created in a separate editing program, such as Microsoft NotePad® or WordPad®, and then copied into the EMC. ***Note:*** *Workstations can access HTML files with or without Internet access.*

Standard Text

When HTML is the selected type of help screen, a programmer can simply add text to the text box; this text will appear on the workstation help screen.

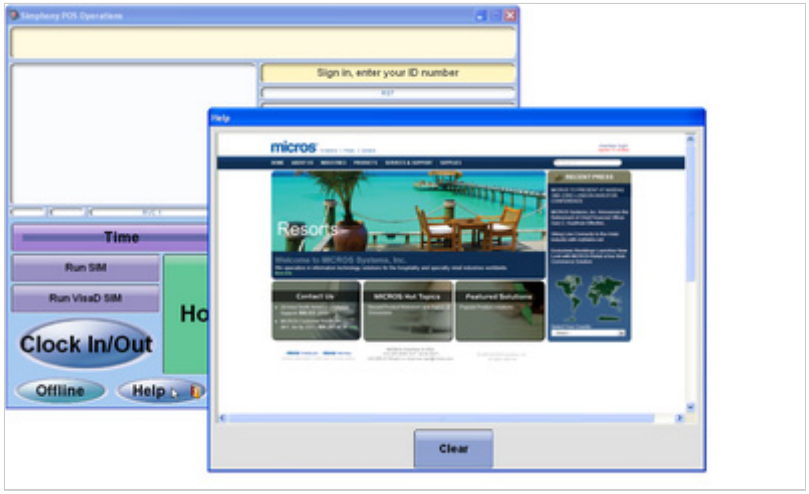
Creating a Topic List

When HTML is the selected type of help screen, a list of all help screens can be generated automatically and placed on one screen. This list is especially useful for programming the Default Transaction Help Screen: the default transaction help screen often contains a list of all the other help topics.

To create the list of topics, put your cursor in the text box where the list should appear, and then press the icon that looks like a list (to the right of the italics *I* symbol).

Workstation Operations

When the **[Help]** function key (301) is pressed, the Help Screen displays in a separate Help Window, as shown here.



An image of a help screen displaying during workstation operations, after pressing the **[Help]** function key.

How to distribute records

From Wiki

This article relates to programming of an EMC module.

1. Navigate to the module you want to distribute.
2. Click **Edit** in the EMC toolbar.
3. Click **Distribute**.
4. If you want to copy all records from the source to the destination:

    a. Select **All Records**.

5. If you selected one or more records in Table View:

    a. Select **Selected Records**.

6. If you want to specify a range of records to distribute:

    a. Click **Specify Records**.
    b. Enter a list or range of specific record numbers to be distributed.

7. Select the appropriate distribution options.
8. Select one or more destination properties for the records.
9. Click **OK**.

See also

- Distribute

Need a question answered about the **How to distribute records** article? Want to offer a suggestion or a correction?
Click here to discuss this page.

Retrieved from "http://wiki.micros.com/wiki/index.php?title=How_to_distribute_records"
Categories: EMC modules | All pages

- This page was last modified on December 18, 2014, at 20:24.

How to remote distribute records

This article relates to programming of an EMC module.

1. Navigate to the module you want to distribute.
2. Click **Edit** in the EMC toolbar.
3. Click **Remote Distribute**.
4. Enter the server or the IP address of the destination system.
5. Enter the user credentials for the destination system and log in to the remote database.
6. If you want to copy all records from the source to the destination:

    a. Select **All Records**.

7. If you selected one or more records in Table View:

    a. Select **Selected Records**.

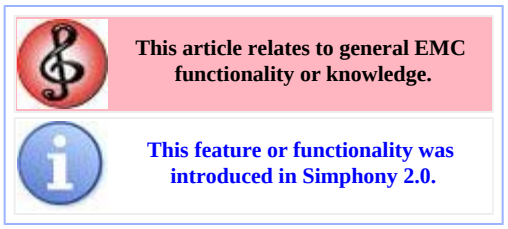
8. If you want to specify a range of records to distribute:

    a. Click **Specify Records**.
    b. Enter a list or range of specific record numbers to be distributed.

9. Select the appropriate distribution options.
10. Select one or more destination properties for the records.
11. Click **OK**.

Inheritance and Overrides

"Zoneable" redirects here. For Zones, see Zone.



The terms **Inheritance** and **Override** are used to describe functionality that allows a record to be created outside of its traditional scope, for the purpose of creating a single record to exist in one hierarchy as opposed to creating an identical record in numerous locations. This functionality was introduced in Simphony 2.0. (To see all the programmable record types and the location(s) where each type can be programmed, see List of EMC Record Types.)

In previous Simphony versions, it was common for a user to create a record and then distribute it to a number of properties or RVCs. For example, a discount named "Open % Discount" (Object Number 1) may have been configured and distributed to every property. If a system contained 900 properties, there would be 900 individual discount records with Object Number 1. With the inheritance functionality, it is possible to configure the record one time and have all 900 properties use the same record. In addition, an individual property can *override* the record, if the configuration needs to differ from the inherited version.

Contents

- 1 Zone Configuration Overview
  - 1.1 Understanding Inheritance
  - 1.2 Creating Overrides
- 2 Which records will be used?
  - 2.1 The Importance of Object Numbers
  - 2.2 Collisions: Improper Programming
    - 2.2.1 Elimination of Errors
- 3 Permissions and Other Considerations
- 4 See also

Zone Configuration Overview

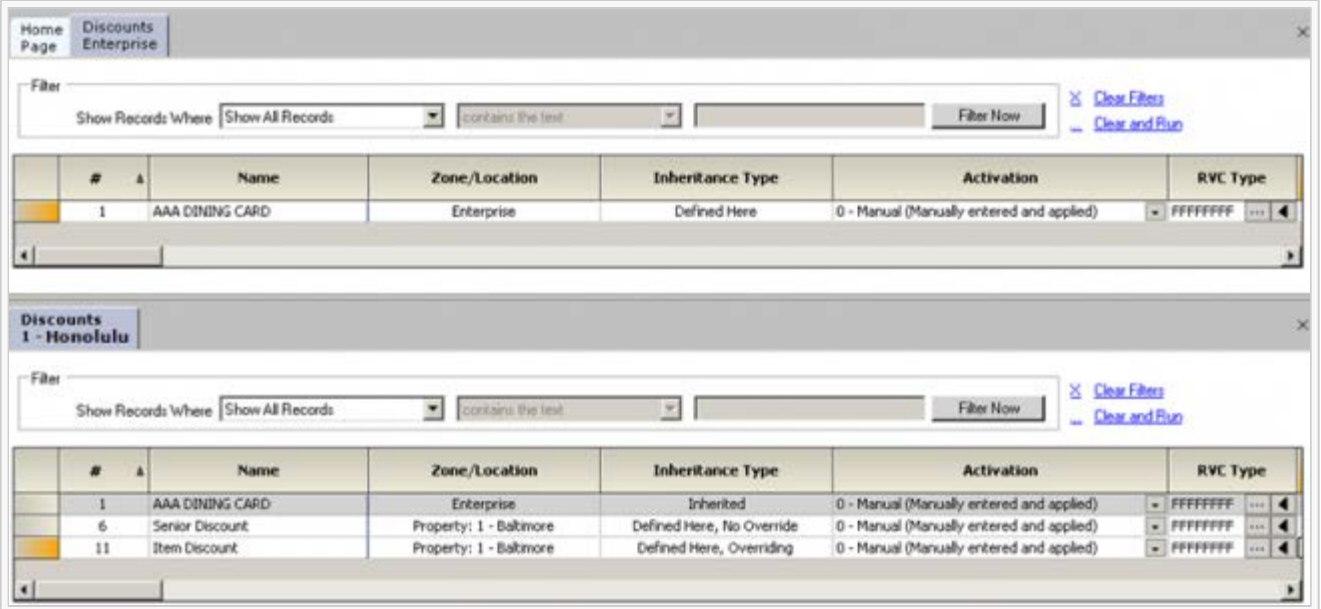
In the Zone Configuration module, a user defines the hierarchies and hierarchical relationships within the Enterprise. It is possible (and common) for the same hierarchy to exist in multiple hierarchies. For example, a common configuration may be:

- Enterprise
  - Beverage Zone
    - East Coast
    - West Coast
  - Food Zone
    - East Coast
    - West Coast

With this configuration, the Honolulu property will exist in two West Coast Zones, one for food and one for beverage.

Understanding Inheritance

With the proper configuration in the above example, beverage records can be created in the West Coast Beverage Zone, while food records can be created in the West Coast Food Zone. The Honolulu property *inherits* any record configured in those zones automatically, because those Zones are parent hierarchies of Honolulu. To put this in the context of EMC configuration, when Menu Item Maintenance is opened for the Honolulu property, it will show inherited records from both zones.



These images display the Discounts module from the Enterprise level and the Honolulu property. The top part of this image displays an example of a record that is **Inherited** from another hierarchy. The bottom displays a record that **Overrides** a record configured in another hierarchy; the override is created by the user via the Table View Right-Click Menu.

In any module where inheritance is allowed, EMC displays two columns immediately after the Name column:

- **Zone/Location**: This column displays the User-Defined Zone or the Location (Enterprise/Property/RVC) of this the record. Each record can be defined in the current scope or from a level above this scope; this column displays this relationship.
- **Inheritance Type**: This column displays the type of Inheritance for each record. A record can be at the current hierarchy or somewhere above the current hierarchy. The values for this column are:
  - **Defined Here, No Override**: This status indicates that the record was defined in the location of the module that is currently open. The record does not override another record (however, it is possible that another record overrides this record; EMC is not aware of records "below" the current location).
  - **Inherited**: This status indicates that the record was created in another location, and it is inherited into the current module/location.
  - **Defined Here, Overriding**: This status indicates that the record was defined in the location of the module that is currently open. The record is overriding another record from a "higher" location.

In both examples on the right, the Discounts module has been opened from the Honolulu property. In the first example, EMC displays the Zone/Location as "1 - Food West Coast", and the Inheritance Type of "Inherited from Parent Zone." By displaying the inherited records, the user has a clear picture of the records that will be active for the property. Note that any inherited record *cannot be edited from a child hierarchy*; the fields are read-only.

Creating Overrides

In both examples images, the Discounts module has been opened from the Honolulu property. In the first example in the image, EMC displays the "Open % Food" discount record that was defined in the "1 - Food West Coast" zone. This discount will be available in all properties in the "Food West Coast Zone", but what if the Honolulu property requires the discount to act differently than other West Coast properties? In this case, the programmer can *override* the inherited record. By using the Table View Right-Click Menu's "Override Record" option, a new "record #1" can be created for the Honolulu property, overriding the "Open % Food" record that exists in the Food West Coast zone. The second example image displays the Discounts module after the record has been overridden.

Which records will be used?

EMC displays all records that will be used for a given hierarchy; this list of records represents the items that will be downloaded to an OPS client. For example, when the Discounts module is opened for the Honolulu property, it is possible that records 1-30 are displayed; the records may come from different Locations — "Food West Coast", or "Enterprise", or "Honolulu", etc. — but all records are available in the Honolulu property.

Both EMC and OPS use the same logic to determine which record will be used. In the simplest examples, the "lowest record" will always be used. Consider this example as it relates to discount records:

- **Enterprise** (records 1, 2, 3, 4, and 5 exist)
  - **Food West Coast Zone** (records 1, 2, and 3 exist)
    - **Honolulu Property** (records 1 and 5 exist)

Given this configuration, the following discount records will be used for the Honolulu property:

- 1 - defined in the Honolulu property
- 2 - defined in the Food West Coast Zone
- 3 - defined in the Food West Coast Zone
- 4 - defined at the Enterprise
- 5 - defined in the Honolulu Property

The Importance of Object Numbers

The configuration above shows how records are overridden. When two or more records exist with the same object number, the record that is closest to the requested hierarchy will be the record that is used. Because the Honolulu property includes Object Number 1, record #1 defined in Food West Coast Zone cannot be used. Similarly, because Object Number 4 is defined at the Enterprise but not below, it will be used.

Collisions: Improper Programming

In the example above, a simple hierarchy was used to explain the records that will be used:

- Enterprise
  - Zone
    - Property

In many configurations, however, the same Property or RVC will exist in multiple hierarchies. Using the original example, the configuration may be:

- Enterprise
  - Beverage Zone
    - West Coast Beverages
      - Honolulu Property
  - Food Zone
    - West Coast Food
      - Honolulu Property

When the same Property or RVC exists in multiple hierarchies, it is possible for a programmer to create invalid records. In this recent example, it is possible for the programmer to create discount record #1000 in the West Coast Beverages Zone, and another discount record #1000 in the West Coast Food Zone. This configuration is not valid (it is called a record "collision"), because both of those Zones are exactly one level above the Honolulu Property. EMC will detect this error condition when a user tries to open the Discounts module for the Honolulu Property. The error message will be: *This module cannot be opened. EMC has detected two inherited records with the same Object Number, but there is no way to determine which record should be used because neither record overrides the other. Please correct the programming for these records: (shows the records from West Coast Beverages and West Coast Food).*

Elimination of Errors

To eliminate these types of errors, programmers should prepare rules and guidelines for their Enterprise's configuration prior to creating the individual records. For example, if programmers decide that all food items will be in the range 101001-199999 and all liquor items will be in the range 201001-299999, the record collision problem should not occur (when using the hierarchy in the example).

Permissions and Other Considerations

While working with inherited records in EMC, please note the following guidelines:

- A record with the Inheritance Type, "Inherited", cannot be edited or deleted; these records display with a grayed-out background in Table View.
- When adding records, inherited records are included in the list of existing object numbers. For example, if record #1 is inherited, the EMC Insert Dialog will not let the user create record #1 again. (A user with permissions can override the record, but the Insert Dialog will not create new records that override existing records.)

To override a record, use the Table View Right-Click Menu's "Override Record" option, or choose "Override Record" while in Form View. These options are available only when the logged-in user is associated with an Employee Role with privileges to "Add Overrides" in the particular module.

- When the "Inheritance Type" column in Table View is right-clicked, EMC will display a list of all records that are being overridden by the selected record.

See also

- List of EMC Record Types
- Simphony Zones

Simphony Hierarchies	Enterprise · Property · Revenue Center · RVC Configuration · Selection Hierarchies · Zone · **Inheritance and Overrides** · EMC Programming Hierarchies
Learning series: Simphony Hierarchies	
Table View in EMC	Form View and Table View · Distribute · EMC Delete Dialog · EMC Insert Dialog · EMC Shortcut Keys · F3/F4 · **Inheritance and Overrides** · Option Bit Comparison Dialog · Table View Filtering · Table View Right-Click Menu
Learning series: Working with EMC's Table View	

Installing the VeriFone E23x Card Reader Driver

Contents

- 1 System requirements
- 2 Installing the driver
- 3 Configuring the OPOS magnetic stripe reader or the barcode reader
- 4 Removing the VeriFone E23x card reader driver
- 5 Testing the VeriFone E23x card reader

System requirements

- Microsoft Windows 7 or later
- Microsoft .NET Framework 4 or later

Installing the driver

If an older version of the driver already exists, you must uninstall the old driver before installing the new driver.

You can connect the VeriFone E23x magnetic stripe reader before or after installing the driver. Click the link provided here: https://portals.micros.com/hardware/mTabletmStation/Forms/AllItems.aspx

1. Download the VeriFone E23x card reader driver.
2. Run the **E23xDriverInstaller_1.2.0.exe** file.
3. Click **Yes** each time you are prompted.
4. Run the **E23x_OPOS_DLL_Install_1.5.2.0.exe** file.
5. Click **Yes** each time you are prompted.

Configuring the OPOS magnetic stripe reader or the barcode reader

1. Log into the EMC and select the property that will be using mTablet E devices.
2. From the **Setup** tab, under the **Hardware/Interfaces**, click **Workstations**.
3. Click the Form view\Table view toggle button to go to the form view.
4. Select the workstation that will be using the VeriFone E23x card reader. If required, add a new workstation record.
5. Click the **Devices** tab.
6. Click **Add** under the **Peripheral Device Configuration** section.
7. If you want to configure a magnetic stripe reader device, select **OPOS Mag Stripe Reader** as the device type. If you want to configure a barcode reader, select **OPOS Barcode Reader** as the device type. Click **OK**.

8. If you selected OPOS Mag Stripe Reader as the device type, enter the device name as **MSRE23x** in the Configuration box. If you selected OPOS Barcode Reader as the device type, enter the device name as **ScannerE23x** in the **Configuration** box. Click **OK**.
9. Click **Save**.
10. Reload the database and restart the service host.

Removing the VeriFone E23x card reader driver

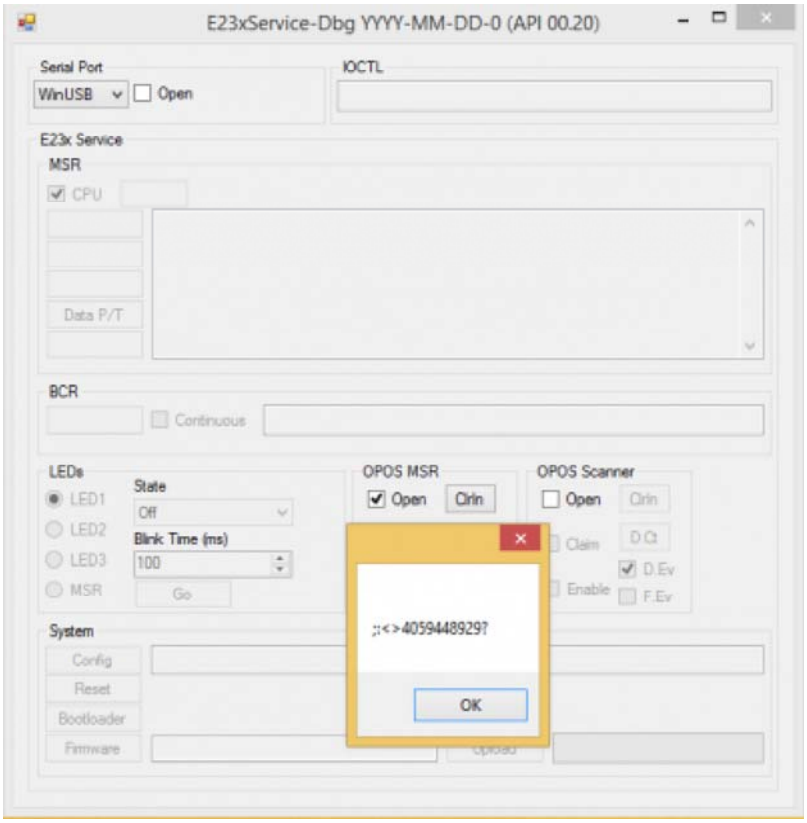
To remove the VeriFone E23x magnetic stripe reader driver from the operating system, you need to uninstall the following components:

- E23x Driver Installer <versions>
- E23x OPOS DLL
- Microsoft Point of Service (POS) for .NET v1.12
- OPOS Common Control Objects 1.13.001

Testing the VeriFone E23x card reader

You can use the e23xservice.exe application to test the barcode reader or magnetic stripe reader functionality through the OPOS interface.

1. Copy the **e23xservice.exe** and **e23xD.dll** files to the **<Drive>:\Program Files\Verifone\E23xOPOS** folder.
2. Exit the ServiceHost application.
3. Run the **e23xservice.exe** application.
4. Under **OPOS MSR**, select the **Open**, **Claim**, **Enable**, and **D. Ev** (data events) check boxes. After each successful swipe attempt, the **D. Ev** check box is deselected.
5. Swipe the card.
6. If the card successfully swiped, a message with the card data appears.



Item Price Substitution Discount

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Understanding item price substitution discounts
- 2 Configuring item price substitution discounts
  - 2.1 Configuring discount interaction (exclusivity)
- 3 Using item price substitution discounts
- 4 See also

Understanding item price substitution discounts

An item price substitution discount is a type of automatic discount or automatic coupon discount that changes the price of a menu item to a different price. This type of discount is used in scenarios such as *All Beverages are half-price on Tuesday*, or *If three burgers are ordered, they are all 20% off.*

Configuring item price substitution discounts

1. Navigate to *EMC > Enterprise / Property / Zone > Configuration > Discounts > Auto*.
2. Select **[1 - Item Price Substitution]** from the drop-down list.
3. Enter information in the following fields:

Field	Description
Priority	This field determines the order in which discounts are calculated. This field is blank (0) for all discounts by default, meaning that discounts are calculated at the same time. When using this field, the workstation calculates all discounts in priority 1, then in priority 2, and so on. Priority 0 discounts are calculated last. The Priority field allows the discount engine to determine which discount to apply quicker, thus reducing CPU time on the workstation.
Use Price in MI Group Detail	Select this option to use the promotion price that appears in the Menu Item Groups module for the discounted menu item. When you select this option, the textboxes next to Percent Off, Amount Off, and Amount Substitution are dimmed even after their respective radio buttons are selected.
Trigger MI Group	Select the menu item group to trigger the discount award. When the minimum quantity of items from this menu item group is ordered, the items are discounted based on the award configuration for this discount. When using item price substitution discounts, the trigger menu item group is also the award menu item group (see Discount). For example, "All Beer" is the trigger menu item group with a minimum quantity of

	4. In this configuration, after four beers are ordered on one check, they are discounted by 20%.
Minimum Quantity	Enter the number of items that must be ordered from the trigger menu item group before the discount award applies to the check. If this field is set to 0, it is the same as setting it to 1 (every item will be discounted).
Percent Off	Select this option to enter the percent discount that will apply to each item in the trigger menu item group. This option is used for discounts such as *all sodas are 50% off on Tuesdays*.
Amount Off	Select this option to enter the amount discount that will apply to each item in the trigger menu item group. This option is used for discounts such as *all sodas are $1.00 off on Tuesdays*. Items are not discounted below 0.00. If an item's price is $5.00 and this field is set to $9.00, the item is discounted to $0.00, not -$4.00.
Amount Substitution	Select this option to enter the amount that will be charged for each menu item in the trigger menu item group. This option is used for discounts such as *all sodas are $2.00 on Tuesdays*. With this type of discount, each item can be discounted a different amount. For instance, if the discount is *all shirts are $10.00 on Saturdays*, a $15.00 shirt is discounted by $5.00 and a $17.00 shirt is discounted by $7.00. The price never *increases*; continuing with the $10.00 shirt example, a $9.00 shirt does not increase to $10.00.
Max Count	When you select discount option **[22 - Simple Transaction Exclusivity]** for this discount, enter the maximum number of discounts that can apply to a single check. For example, if this discount is $5.00 off every appetizer with a limit of 3 appetizers per check, this field should be set to 3. Then, if a guest orders seven appetizers, the three most expensive appetizers are discounted, but the other four appetizers are regular price. If this field is set to 0, the maximum count is unlimited.

Configuring discount interaction (exclusivity)

For information about configuring a discount to interact with other discounts, see Discount Exclusivity.

Using item price substitution discounts

The customer gets the best deal when the system performs the discount calculation. The first example shows the discount amount after four 2.50 beers are ordered. All four beers are discounted at 20% for a total $2.00 discount.

If the operator then adds a "premium" beer for a higher price ($3.50 in the example), the discount recalculates to include the "best deal" for the customer. Because the best deal is to discount the $3.50 and three of the $2.50 beers, the new discount is $2.20.

Item price substitution discounts appear on customer receipts based on the configuration of the Item Discount option.

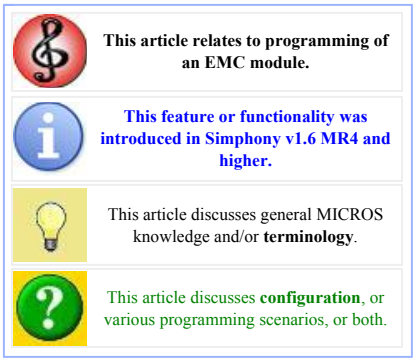
```
-- Example 1: Four Beers --
  Draft Beer      2.50
  Draft Beer      2.50
  Draft Beer      2.50
  Draft Beer      2.50
  Discount       -2.00

-- Example 2: Five Beers --
  Draft Beer      2.50
  Draft Beer      2.50
  Draft Beer      2.50
  Draft Beer      2.50
  Premium Beer    3.50
  Discount       -2.20
```

See also

Discounts	Discount · Manual Discount · Automatic Discount · Automatic Coupon Discount · Automatic Discounts for Decimal Quantity Menu Items · Combination Pricing Discount · **Item Price Substitution Discount** · Quantity Threshold Discount · Sales Price Discount · Total Price Threshold Discount · Discount Engine · Discount Exclusivity · Discount NLU · Menu Item Group · Revenue Center Group
Learning series: Discounts	

Kitchen Themes

*This article reviews the functionality and configuration steps to enable **Kitchen Themes** for KDS Systems.*



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  - 2.8 Configure the Order Devices
  - 2.9 Making Temporary Kitchen Theme Changes
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Overview

The **Kitchen Themes** feature allows a business to create multiple configuration settings for its Order Devices, which are stored in the database and identified by name (e.g., Breakfast Theme, Lunch Theme, Dinner Theme, Happy Hour, Corporate Banquets, and Private Banquets etc.). With it, managers can change the order direction and output of the entire restaurant by simply activating a new theme.

Warning: For those who choose to utilize the Kitchen Themes feature ***prior*** to the release of Simphony v1.6 MR5, it's vital that Kitchen Themes be configured to account for all 24 hours of a day (even if Revenue Centers are not open for business during certain times). Failing to do so may result in the KDS system to discontinue working as expected.

Usage

During the business day, a restaurant may open and close portions of the facility to accommodate the changing needs of its customers and trade. It's not uncommon, for example, for restaurants to close a portion of the seats during mid-morning hours that are normally filled during the breakfast and lunchtime rushes. Similarly, the bar may be closed at lunch time, but opened in the evening for happy hour and dinner.

Clearly, the number of employees needed during the day will vary with the customers and as sections or even Revenue Centers (e.g., bars, retail shops or a drive-thru) open and close, the number of Workstations, printers, and other peripheral devices used by the system will also change. The job of determining which Order Devices will be active and when usually falls to the manager. If the restaurant is large, implementing the changes can be cumbersome as well. The Kitchen Themes feature was designed to speed up the transition phase between shifts or active periods by storing common sets of order device configurations into a separate table in the database. Each data set (or themes) is assigned a name for easy identification. When a change is required, the manager simply activates the appropriate theme (either through

the EMC or a KDS PMC Procedure). The system automatically copies the new settings to the appropriate device tables and reloads the database. The advantages are clear:

- **Efficiency** — Simple, direct, reconfiguration of restaurant devices – a time-saver.
- **Accuracy** — Reduces the amount of error caused by manual reconfiguration.
- **Variety** — No limits on the number of themes that can be stored.
- **Flexibility** — User's control when the configuration is changed.
- **Consistency** — Repeatable results.

Kitchen Themes is an optional feature. Employees must be privileged to set or change the active kitchen theme.

EMC Configuration

Step-by-Step Procedures

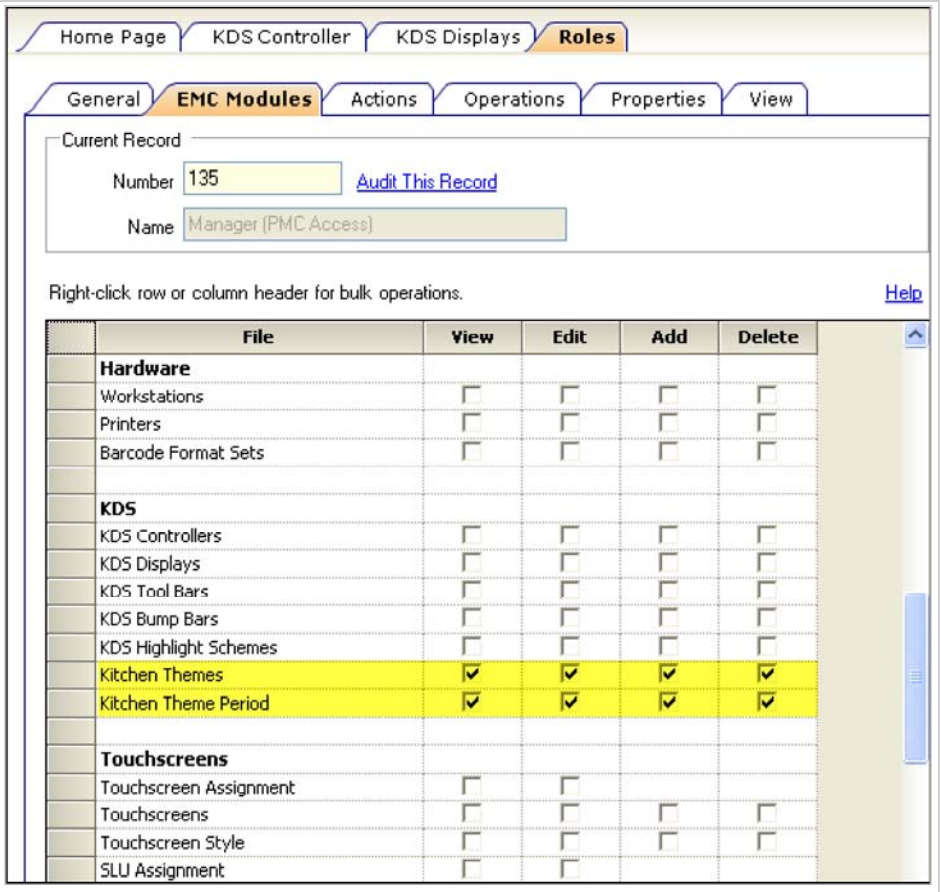
This section describes the procedures required to enable and use the **Kitchen Themes** feature.

Assign Employee Privileges

Follow these steps to allow an employee to configure or change the active Kitchen Theme:

1. Open the *EMC-> Enterprise* level-> *Personnel-> **Roles*** module.

2. Highlight the **Name** of an 'Employee Class' from the table. For Kitchen Themes, this is typically a manager or administrative-level employee. Click on the '**EMC Modules**' tab and under the '**KDS**' files, enable the appropriate EMC access options for both the '**Kitchen Themes**' and '**Kitchen Theme Period**' modules.

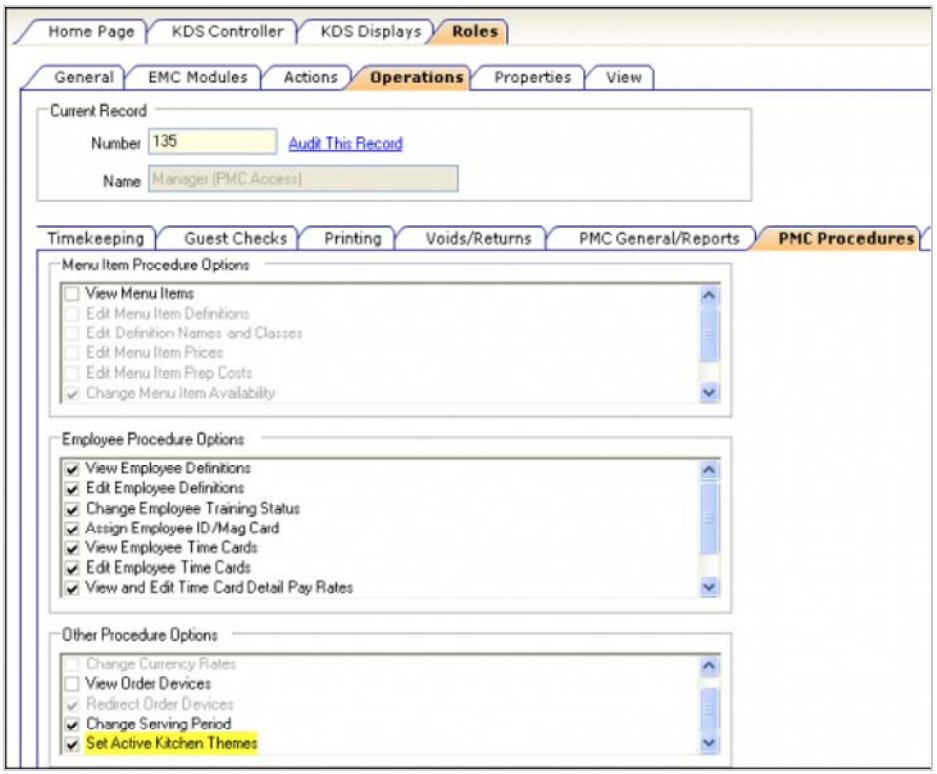


EMC-> Roles-> EMC Modules tab

3. To allow users to change the current active Kitchen Theme, go to the '**PMC Procedures**' tab. Under the '**Other Procedure Options**' section, check the '**Set Active Kitchen Themes**' box to

assign the privilege to run this procedure to members of this class.

4. Click the '**Save**' icon to save the record.



EMC-> Roles-> Operations tab-> PMC Procedures tab

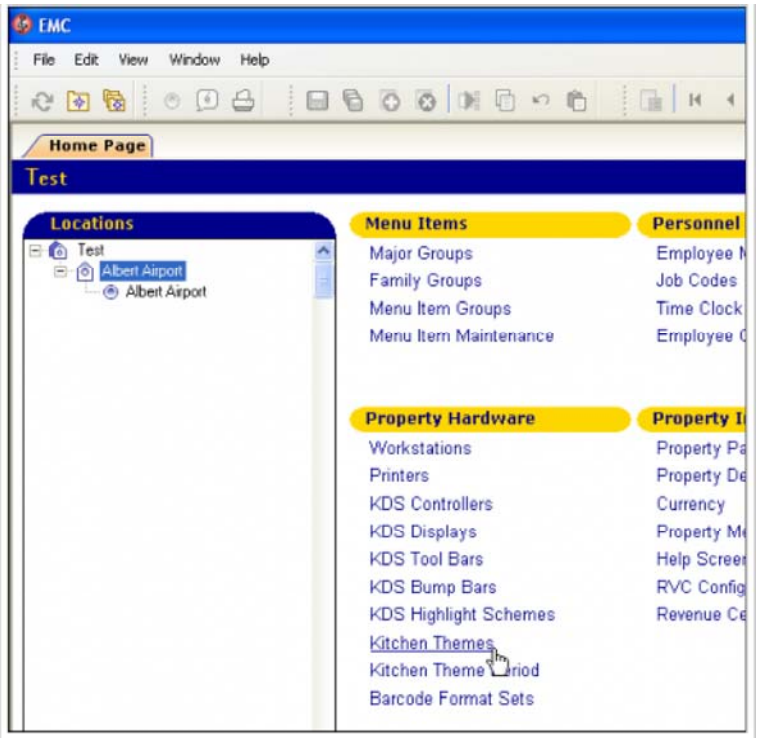
Activate Themes for the First Time

Kitchen Themes are stored as rows of device data in a separate table in the database. As you configure a new Kitchen Theme, notice that the options bits are duplicates of those found in the Workstations, and Order Devices forms. This duplication is what allows for the retention of multiple configurations which can then be recalled to the active system at the discretion of the user.

- Follow these steps to activate Kitchen Themes for the first time:

  1. Configure the Workstations, and Order Devices as usual.

  2. Open the *EMC-> Property level-> Property Hardware->* ***Kitchen Themes*** module.

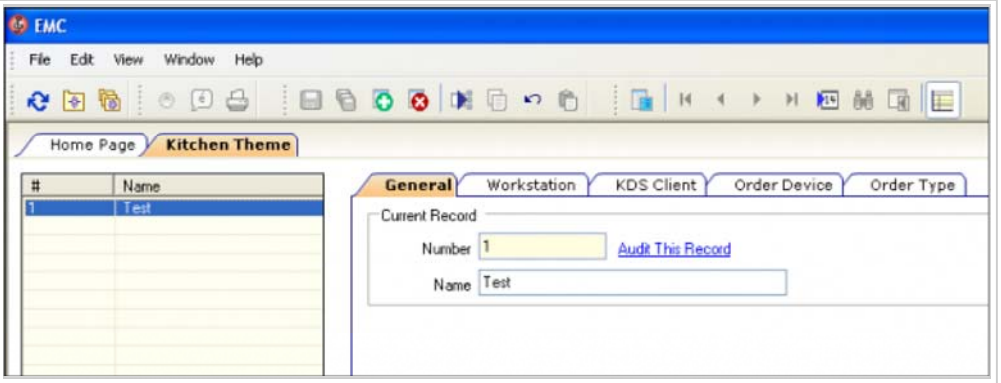


EMC-> Property-> Property Hardware-> Kitchen Themes

3. By default, the page opens to Table view.

EMC-> Kitchen Theme tab - Table view

- Toggle to Form view. (*Optional*) Assign the **Name** of the kitchen theme to something descriptive (e.g., Breakfast Theme 6-10:30, Lunch Theme 10:30-3:00, High\Low Volume Theme, etc.)

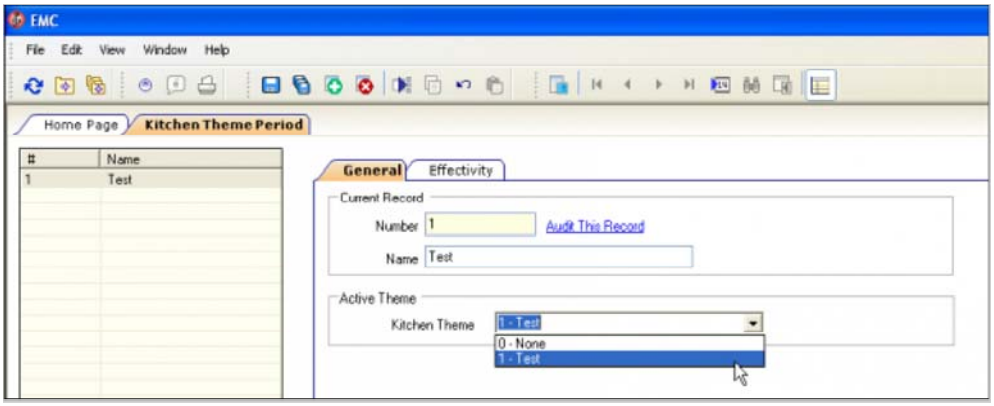


EMC-> Kitchen Theme tab - Form view

4. Edit each additional tab (i.e., Workstation, KDS Client, Order Device and Order Type) as needed.

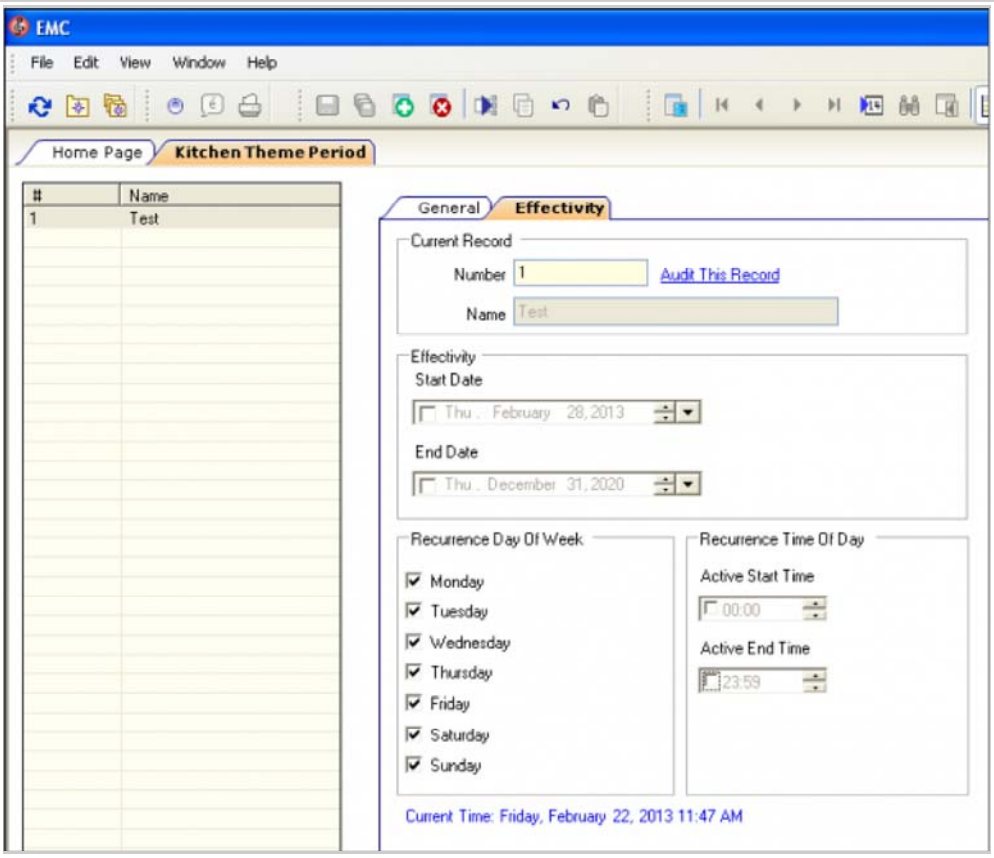
5. Click the '**Save**' icon to save the record.
6. Open the *EMC-> Property level-> Property Hardware->* ***Kitchen Theme Period*** module.
7. Click the '**Insert**' icon to add a new record to the **Kitchen Theme Period** table. The system will automatically assign the next available **Number** and add the record. From Table view, toggle to Form view to the **General** tab.

8. From the **Active Theme** section, select the appropriate **Kitchen Theme** from the drop-down menu that will correspond to the *Kitchen Theme Period->* ***Effectivity tab*** settings.



EMC-> Kitchen Theme Period tab - Form view

9. From the '**Effectivity**' tab, configure the following Kitchen Theme Period settings for each period:



EMC-> Kitchen Theme Period tab - Effectivity tab

Effectivity

- '**Start Date**' and '**End Date**' fields
  - Enter the effective dates for this record. When both the 'Start Date' and 'End Date' settings are left disabled, the record is considered effective.

Recurrence Day of the Week

- '**Monday**' through '**Sunday**' check boxes
  - Select the recurrence effective day of the week for this record.

Recurrence Time Of Day

- '**Active Start Time**' and '**Active End Time**' setting fields
  - Enter the recurrence time of day for this record. When both the Start Time and End Time settings are left disabled, the record is considered effective all day long.

10. Click the '**Save**' icon to save the record.
11. When the configuration is complete, the theme(s) will automatically be active based on their current system setting. Only one theme may be active at a time, therefore ***do not*** overlap the 'Active Start Time' and 'Active End Time' settings.

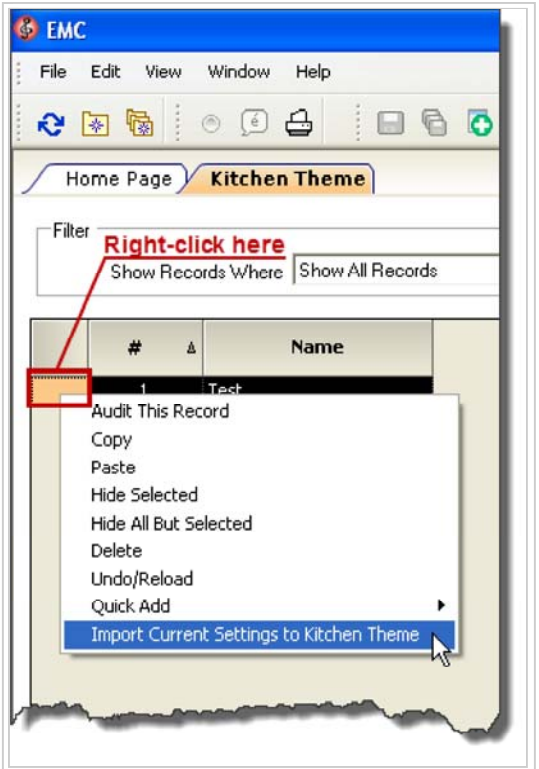
Note: Kitchen Themes may be "deactivated" by accessing the Kitchen Theme Period-> General tab-> Active Theme-> Kitchen Theme setting and assign it the **[0 – None]** setting and Save.

Copy an Active Theme to a New Theme

Follow these steps to take the active theme's configuration and copy to a new theme:

1. Open the *EMC-> Property level-> Property Hardware->* ***Kitchen Themes*** module.

2. Remain on Table view. Select the **Name** of the theme to be copied and right-click on the gray box on the far left that's adjacent to the Kitchen Theme's record number as shown here:
3. From the drop-down menu, select the '**Import Current Settings to Kitchen Theme**' option. This will copy the existing configuration information to a new theme record. The original theme (i.e., the one from which the settings are copied), remains unchanged.
4. Change the **Name** of the new kitchen theme to something more descriptive (e.g., Breakfast Theme 6-10:30, Lunch Theme 10:30-3:00, High\Low Volume Theme, etc.)
5. Edit the **Theme** fields as needed.
6. When the configuration is complete, click the '**Save**' icon to save the record.



EMC-> Kitchen Theme Period tab - Importing theme

Create a New Theme

Note: Kitchen Themes are only allowed to be added beginning at the Property level.

Follow these steps to create a new theme:

1. Open the *EMC-> Devices->* ***Kitchen Themes*** module.
2. Click the '**Insert**' icon to add a new record to the theme table. The system will automatically assign the next available **Number** and add the record. From Table view, toggle to Form view.

Note: When a new theme is started, the system imports the current (active) device settings as the starting point.

3. (*Optional*) **Name** the Kitchen Theme to something descriptive (e.g., Breakfast Theme, Banquet Theme or High-Volume Theme, etc.).
4. Click the '**Save**' icon to save the record.
5. Proceed to the **Workstation** tab.

Enabling Workstation Order Device Masking

Follow these steps to specify which of the user workstation order devices is relevant to this kitchen theme:

1. Open the *EMC-> Devices-> **Kitchen Themes*** module.
2. Highlight the **Name** of a kitchen theme from the table and toggle to Form view.
3. Go to the **Workstation** tab. Beneath the '**Workstation Order Device Output**' header; use the '**Add**' link (to add individual Workstations) or the '**Add All**' link (to add all of the configured Workstations at once) that will be communicating to the assigned Order Devices set up in the system. If needed, use the '**Delete**' link to remove any undesired Workstations from the module.
4. Highlight a Workstation from the list and specify under the **Order Devices** column which devices will be accessible to it by selecting the check box next to each of the desired Order Device(s) that are listed there.

Note: Only those Workstations relevant to the current theme need to be defined. When the new theme is loaded, any active device that is not included in the new theme will be set to disabled.

5. Repeat Step 4 for each Workstation in this kitchen theme.
6. Click the '**Save**' icon to save the record.

Configure the KDS Devices

Follow these steps to configure the KDS devices to be used with this theme. Options set here are only applicable when the kitchen theme is active.

1. Open the *EMC-> Devices-> **Kitchen Themes*** module.
2. Highlight the **Name** of a Kitchen Theme from the table and toggle to Form view.
3. Go to the **KDS Clients** tab. Beneath the '**Kds Display**' header; use the '**Add**' link (to add individual KDS Displays) or the '**Add All**' link (to add all of the configured KDS Displays at once) that will be utilizing this kitchen theme. If needed, use the '**Delete**' link to remove any undesired KDS Displays from the module.
4. Select the **KDS Device** from the table and set the following options:

   - **Tool Bar** — From the drop-down list, select the Tool Bar to be used.
   - **Bumpbar Layout** — From the drop-down list, select the Bump Bar layout to be used.
   - **Panels** — Enter the number of panels or logical "monitors" that will define this KDS station when the kitchen theme is active.
   - **Panel Layout** — Specify whether the KDS station displays multiple panels horizontally (top-to-bottom) or vertically (left-to-right).
   - **Serpentine Mode** — Specify how the orders will flow on the KDS station when this kitchen theme is active. The options are:
     - **TSR** (*PC-Based Clients Only*) — Displays incoming orders starting from the top left corner, filling the first column, then spilling into the top of the next column, and so on. The TSR mode uses columns only; it ignores the number of rows. The KDS station displays as many orders on the screen as possible.
     - **Horizontal** — Displays incoming orders on the screen from left to right, row by row, starting from the top left corner and moving across.
     - **Vertical** — Displays incoming orders starting from the bottom right corner, moving up and then moving to the left.

5. Repeat Step 4 for all of the KDS devices associated with this theme.
6. Click the '**Save**' icon to save the record.

Configure the Order Devices

Follow these steps to configure the Order Devices associated with this theme. Options set here are only applicable when the kitchen theme is active.

1. Open the *EMC-> Property level-> Property Hardware-> **Kitchen Themes*** module.
2. Highlight the **Name** of a Kitchen Theme from the table and toggle to Form view.
3. Go to the **Order Devices** tab. The Device table is automatically populated with the names of all the order devices currently in that Property. Select the correct RVC. Select the desired order device.

4. From the **General** tab, set the following options:

- **Device Type** — Select the '**1 - Remote'** type for a KDS Display.
- **Primary Device Type** — Select the '**1 – KDS'** device type for a KDS Display.
- **Device** — Set the primary device for displaying remote orders from this KDS Display.
- **Backup Device Type** — Select the '**1 – KDS'** device type for a backup KDS Display.
- **Backup Device** — Select an alternate KDS Display device for receiving remote orders in the event of a communication failure with the primary KDS device.
- **Order Device Redirect** — Select the order device to which this order device is redirected. Selecting this order device's own name allows for normal operation. To disable output to this device, clear the option. When using KDS, the following conditions apply:
  - A KDS client may be directed to another KDS client.
  - KDS client may be directed to a printer.
  - A printer may not be redirected to a KDS client.
  - A printer may be directed to another printer.

5. Select the **KDS** tab and set the following options:

- **KDS Course Alerts** — Configure Course Alerts
- **Appetizer Alerts** — Specify how long an appetizer can be in the system before alerting the kitchen that it is taking too long to prepare.
- **Non-Appetizer Alerts** — Specify how long a non-appetizer can be in the system before alerting the kitchen that it is taking too long to prepare.

On a Prep or Expo display, the order background color will change from white to yellow when Alert 1 expires. When Alert 2 expires, the background color will change to red. On an SOS display, the background colors also change colors when an alert expires. In addition, the SOS table will display one exclamation point (**!**) after Alert 1 expires and two exclamation points (**!!**) when Alert 2 expires. The exclamation point(s) will continue to display until the table is tendered.

Alert 2 ***must*** be greater than Alert 1. Use the button to bring up a dialog box and enter the times.

EXAMPLE

Alert 1 Time=00:10:00 (appears 10 minutes after the order is sent to the kitchen)

Alert 2 Time=00:15:00 (appears 15 minutes after the order is sent to the kitchen)

- **Primary Runner Chit Printer** — Assign the appropriate printer that will print runner chits when orders are bumped from the KDS device.
- **Backup Runner Chit Printer** — Assign the appropriate printer that will print runner chits when communication to the Primary Runner Chit Printer cannot be established.
- **Backup Order Device** — Select the KDS device to be used as backup display for this order device.
- **Single Item Per Sub-Order (SIPS)** — Select this option to print a separate runner chit for each item of the sub-order.
- **Send to panel** — Specify the panel number (i.e., 1 or 2) on a split-screen KDS client where orders will be displayed.
- **Beep on New Order** — Specify the type of sound (if any) that will be emitted from the KDS display when a new order is submitted from this order device.

6. From the Dynamic Order Mode **(DOM)** section, set the following options:

- **Dynamic Order Mode Type** — Select a 'Dynamic Order Mode Type' based on the following descriptions:
  - **DOM Fire On Fly** — Displays items on the KDS as they are being rung up in the system.
  - **DOM Fire On Next** — Displays items on the KDS after the next item is entered or changed in the POS.
  - **DOM Fire On Tender** — Displays changed items on the KDS after an order is tendered. This option is the default when the **Dynamic Order Mode** is enabled. The option works with both KDS and printers. For a printer, sorting only occurs when the **DOM Fire On Tender** send option is selected. This priority functionality is based on the type of send option selected for the order device.

7. Continue to the DOM sorting priority section and set the following options:

- **Add Sort Rule** — Set the KDS sorting priority for items that have been added to an order. For example, a sorting priority of **[0 - Sort to Top]** means that any items added to an order will sort to the top of the entire order on the KDS station. Condiments will sort to the top of the group of condiments linked to the parent menu item.
- **Modify Sort Rule** — Set the KDS sorting priority for items that have been changed in an order. For example, a sorting priority of **[1 - No Sort]** means that any items modified in an order will remain in the same location of that order on the KDS station.
- **Void Sort Rule** — Set the KDS sorting priority for items that have been voided in an order. For example, a sorting priority of **[2 – Sort to Bottom]** means that any items voided in an order will sort to the bottom of the entire order on the KDS station.
- **Add Highlight Scheme** — Select the Highlight Scheme (color configuration) used to display items when the quantity of an item has been changed. For example, if "1 Hamburger" has been ordered and it changes to "2 Hamburger", the item will appear in the color configured here, letting the preparer know that the quantity has changed. This functionality occurs unless the KDS option **[19 – Do Not Consolidate Menu Items]** is enabled.
- **Modify Highlight Scheme** — Select the Highlight Scheme (color configuration) used to display items on orders when the item has been modified.
- **Void Highlight Scheme** — Select the Highlight Scheme (color configuration) used to display items on orders when the item has been voided.

8. Continue to the **Order Notification** section and set the options according to site preferences.
9. Select the **KDS Option** tab and set the options according to site preferences.
10. Go to the **Order Type** tab. From the **Order Devices** column, specify which KDS devices will display orders generated by this order device. Up to 8 linked devices are allowed.

Note: This option allows a user to bump orders simultaneously on linked devices.

11. Go to the **Printer Definitions** tab and set the following options to link KDS devices to different runner chit printers:

- From the **Primary Runner Chit Printer** drop-down list, specify where the selected KDS device will print its runner chits when an order is marked done.
- From the **Backup Runner Chit Printer** drop-down list, specify where the selected KDS device will print its runner chits in the event that its designated primary runner chit printer has failed.

12. Click the '**Save**' icon to save the record.

Making Temporary Kitchen Theme Changes

Once the feature is activated, managers can temporarily change the current theme through PMC Procedures. Instructions for this process are provided below.

Changing the Active Kitchen Theme

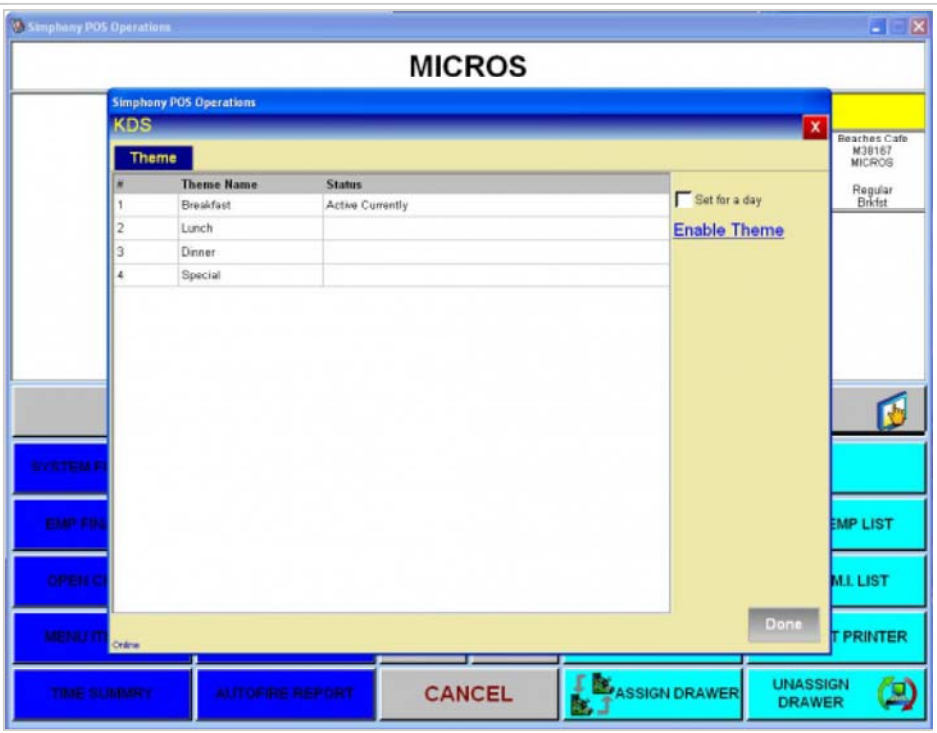
Note: Only privileged employees can set or change the active Kitchen Theme.

Follow these steps to change a Kitchen Theme through **PMC Procedures** from a Workstation:

1. Access any Workstation on the Property and access PMC Procedures and select the '**KDS**' procedure.

PMC Procedures-> KDS

2. Select a new (i.e., different) kitchen theme from the provided list of the **Kitchen Themes** and select the '**Enable Theme**' link. Select the '**Done**' button to exit. Users also have the option to manually set the Kitchen Theme for the entire day by selecting the '**Set for a day**' checkbox.



PMC Procedures-> KDS

KDS allows a user to change a device setting without creating a new kitchen theme or modifying the existing record. When a change is made to a User Workstation, Devices, or Order Devices form while a Kitchen Theme is active, a dialog box is displayed asking if the change should be included in the active theme.

- If '**YES**' is selected, the system will change the current configuration and update the record in the Kitchen Themes table.
- If '**NO**' is selected, the configuration is changed but not the Kitchen Themes record. This is, in effect, a temporary change. The system will continue to use the modified theme until the current theme is re-fired or another theme is activated.

Restrictions

1. If RVCs are going to share Kitchen Display hardware, then their configuration for the KDS Controller and the KDS clients ***must*** be the same.

    a. This means that the same theme ***must*** be in effect for each RVC.
    b. If a Kitchen Theme is activated for one RVC, then all of the RVCs sharing that KDS Controller ***must*** use the same theme.

2. RVCs that require their own control of the KDS Hardware / Clients must have their own KDS Controller service.

    a. This means that those KDS clients or the KDS controller service ***cannot*** be shared amongst other RVCs.

KDS Chit Layout Style

A **KDS Chit Layout Style** is the style of a chit that displays on a KDS Display. A single KDS Display may be configured with one of eight different Layout Styles.

This article discusses a topic related to **hardware**.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 EMC Configuration
- 2 See also

EMC Configuration

Chit Layouts are assigned to the KDS Display in the EMC, in the KDS Display module. This module is located on the property scope of EMC. The layout chosen for a display largely depends on the customer's needs. The different chit layouts can generally be broken into five categories:

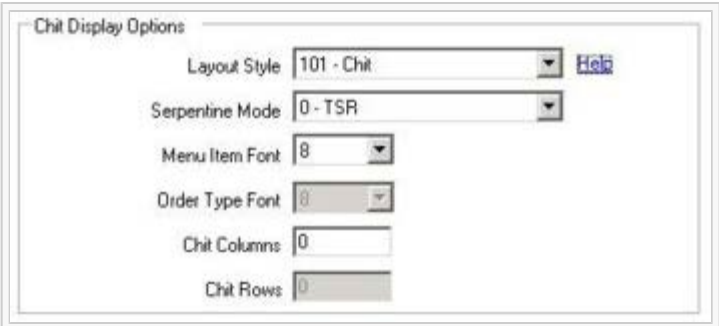
Standard chits
: These chits do not display any information such as seats or order types; only the menu items display. These chits would be used in revenue centers

Chits with seats
: These chits would be used in revenue centers that use Seat Handling.

Chits with order types
: These chits would be used in revenue centers where the Order Type is important (perhaps to distinguish between Dine-In and Take-Out orders.

Chits with seats and order types
: The chits would be used in environments where both Order Types and Seat Handling are important to the operations.

Lists
: The list views do not display individual chits. Instead, each item is listed, one on top of the other (similar to a spreadsheet). This view is used based on the customer's preference, when the chit view is not the desired functionality.



The Layout Style field determines the type of chit to be used for orders appearing on this display. The Help link next to the drop-down box will show the programmer the different types of chits available for use.

To view each type of chit layout

When "Help" is chosen from the KDS Display configuration (previous image), a dialog shows each type of chit style. The chit layout shown, Chit w/Order Type, displays the Order Type at the top of the chit.

that is available, open the KDS Display module in EMC and press the "Help" link next to the Layout Style drop-down box.

See also

KDS	KDS · Dynamic Order Mode · KDS Bump Bar · **KDS Chit Layout Style** · KDS Controller · KDS Course Override Setup · KDS Display Icons · KDS Display Status · KDS Display Types · KDS Highlight Scheme · KDS Programming Scenarios · KDS Setup for a Simphony Win32 Client · KDS Tool Bar · KDS Tool Bar and Bump Bar Functions · Upgrading a Restaurant Display Controller (RDC) for KDS v2.1
Learning series: KDS	

KDS Controller

This article is about the service that controls KDS Displays. For information about the the piece of hardware (KDS Display Controller) that allows a monitor display orders, see Supported Hardware for KDS Displays

A **KDS Controller** is a Windows service that controls KDS Displays and performs other KDS-related functions. KDS Controllers are responsible for moving data to and from the KDS Displays: when an order is placed on a workstation, the KDS Controller routes the order to the appropriate KDS Display(s); when an order is bumped from a KDS Display, the KDS Controller routes the information about the order to the reporting database. Additionally, updates to KDS Displays (changing a Tool Bar or Bump Bar button, for instance) are routed through the KDS Controller.

This article relates to programming of an EMC module.

This article discusses a topic related to **hardware**.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

[show]

Article Versions

Contents

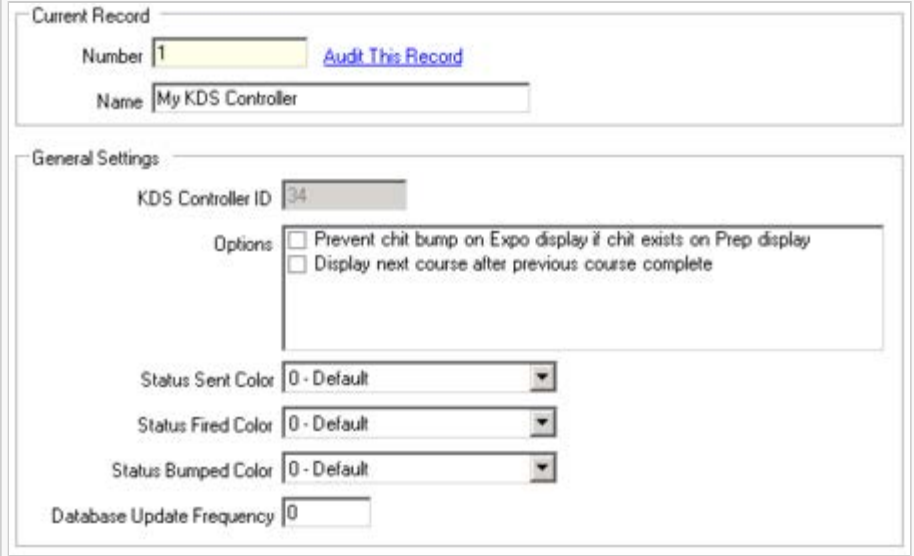
- 1 EMC Configuration
  - 1.1 Service Host
- 2 Programming Considerations
  - 2.1 Hardware
  - 2.2 Practical Limit for KDS Displays
  - 2.3 RVC Configuration
  - 2.4 IP Address
  - 2.5 Backups
- 3 See also

EMC Configuration

The **KDS Controllers** module is opened from the property scope of the EMC. The configurable fields are as follows:

KDS Controller ID
: This field displays the KDS Controller ID of this KDS Controller. The ID is the database ID, and it is not editable. This field is provided for troubleshooting purposes when log messages (etc.) reference the KDS ID instead of the object number.

Prevent chit bump on Expo display if chit exists on Prep display



The configurable fields in the KDS Controller module of EMC.

Select this option to prevent a chit from being bumped from an Expo display if the chit has not been bumped from one of the Prep displays. If this option is disabled, the system will not prevent a user from bumping a chit from the Expo display.

Display next course after previous course complete

This option is used for systems using KDS Coursing functionality. When this option is enabled, menu items from course 2 will show on KDS Displays only after menu items from course 1 have been "bumped".

Status Sent Color

When items are initially service totalled and displayed on KDS Displays, the items will appear this color.

Status Fired Color

This option applies, generally, only to KDS Expo displays. When KDS Menu Item Timing is in use, items will initially display the "Status Sent Color". When an item appears on the KDS Prep Display, the items will appear this color, allowing the Expo station to see that an item has been fired (which means it now appears to the prep station user).

Status Bumped Color

This option applies, generally, only to KDS Expo displays. When KDS Menu Item Timing is in use, after an item has been "bumped" by a prep station user, the item will appear this color, allowing the Expo station to see that the item is ready to be served.

Database Update Frequency

This field determines the number of seconds this KDS Controller will wait to retrieve the latest updates from the database. The default value for this field is 30 seconds. If this field is set to 0, this controller will use the Database Update Frequency field from Property Parameters.

Service Host

From the Service Host Tab, select the Service Host where the KDS Controller record will run. This is the standard Service Host Tab that displays in a number of modules; see Service Host for more information.

Programming Considerations

When programming a KDS environment, the following guidelines must be followed:

Hardware

KDS Controller software requires IIS (WIn32) or WebServer (CE) to operate. KDS Controller is not supported on any Hand Held Terminal (HHT), Workstation 4 or mTablet (E or R). KDS Controller will operate on WS4LX, WS5, WS5A (CE or PosReady) or any Win32 device with IIS installed.

Practical Limit for KDS Displays

No more than 15 KDS Displays should be controlled by a single KDS Controller. This limit may be exceeded in some situations, but R&D has found that the practical limit for the best performance is capped at 15 displays; a configuration in excess of 15 displays is considered to be a performance risk.

RVC Configuration

In the RVC Configuration module, a KDS Controller must be assigned to a Revenue Center so that KDS Displays in the RVC will function correctly. In this module, it is possible to assign the same KDS Controller to multiple Revenue Centers. Two limitations should be observed when using the same KDS Controller in more than on RVC:

- Observe the practical limit. An acceptable configuration: a single KDS Controller that is running three RVCs, each with three KDS Displays. A problem-inducing configuration: a single KDS Controller that is running two RVCs, each with 12 KDS Displays. This "problem-inducing" configuration violates the practical limit for KDS Displays per controller.
- Consider the desired functionality. While there are only a few configurable fields for a KDS Controller, it is possible that the desired KDS functionality for two RVCs is different. Thus, it may be necessary to create separate KDS Controllers for different RVCs so that each RVC may have specific KDS Controller functionality. (See also, KDS Programming Scenarios.)

IP Address

If the computer running the KDS Controller service has multiple NICs, the IP Address of the first NIC will be the IP Address used by the KDS Controller.

Backups

There is no Backup KDS Controller. If one KDS Display is configured to back up another KDS Display, both displays must be controlled by the same KDS Controller. Another important note: if a KDS Controller is running but the KDS Displays being run by the controller are powered off, no error message is returned to the workstation that sent the order. A KDS Controller will keep orders in its queue until the KDS Displays are powered on and ready to receive orders.

See also

KDS	KDS · Dynamic Order Mode · KDS Bump Bar · KDS Chit Layout Style · **KDS Controller** · KDS Course Override Setup · KDS Display Icons · KDS Display Status · KDS Display Types · KDS Highlight Scheme · KDS Programming Scenarios · KDS Setup for a Simphony Win32 Client · KDS Tool Bar · KDS Tool Bar and Bump Bar Functions · Upgrading a Restaurant Display Controller (RDC) for KDS v2.1
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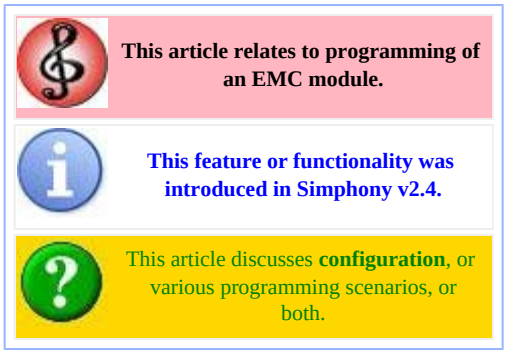
KDS Course Override Setup

This article discusses the basic Menu Item (MI) Maintenance and MI Classes configuration that's needed so that guests and servers will to be able to order any menu item and choose which course in which it will be delivered as evidenced by the KDS displays output.

Note: This functionality is currently available beginning with Simphony v2.4 or higher.

Contents

- 1 Overview
- 2 How it Functions
- 3 Configuration
  - 3.1 EMC Configuration
- 4 See also



Overview

There is now a way to allow guests or servers to override the usual delivery of a Menu Item's (MI) Course to another and have it display as such on the KDS displays. Someone should be able to order an Appetizer and have it served at the same time as the Entrées and also make the Prep staff aware of this Course change via the order chits shown on the KDS displays. The option that enables this capability can be found in the EMC-> MI Classes-> Options-> and is named; **[46 - Override KDS Course Number of Parent Class]**

This option's Context Sensitive Help (CSH) file reads as follows;

This option is for condiment menu items only. Select this option to cause a parent menu item that is modified by a condiment in this Menu Item Class to use the KDS Course of the condiment. For example, the condiment "AS ENTREE" could be used to modify an appetizer, thus forcing the appetizer to use the Entree Course Number. If a parent menu item has several condiment menu items following it that use this option, the last condiment for which this option is enabled determines the parent's KDS Course Number.

How it Functions

A quick review of an example of this feature's functionality may help some better understand the logic of the configuration steps that are outlined below.

Shown here on the Order detail from Ops, basically the guest wants their

Appetizer item to be prepared and delivered along with the other guests Entrées. That's why the '**POTATO SKINS**' item has an '**AS ENTREE**' modifier associated with it.

1. Sign in and begin a check and ring up some menu items.

- BRUSCHETTA
- POTATO SKINS

  AS ENTREE - Allowed condiment

- SHRIMP COCKTAIL
- RAZOR CLAMS
- CRUSTED SALMON

  SALAD – Required condiment

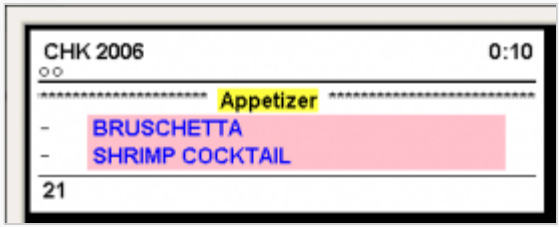
- PACIFIC SNAPPER

  SOUP – Required condiment

- Service Total

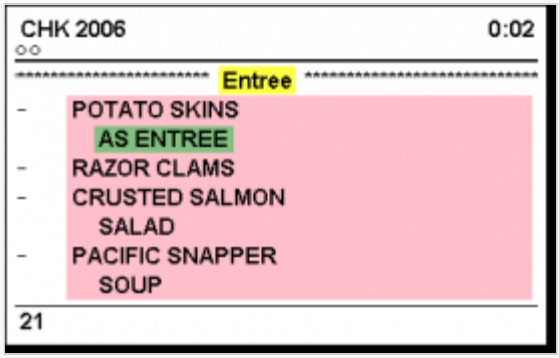
Ops Order Detail

2. Shown here from the KDS display, Course 1 (Appetizer) is sent immediately to all KDS displays and generates a chit with the title '**Appetizer**' and 2 items, BRUSCHETTA and SHRIMP COCKTAIL. Note that the '**POTATO SKINS**' are ***not*** displayed at this time.



KDS Appetizer chit

3. As Course 1 (Appetizer) is bumped from the Expo KDS, Course 4 (Entrée) is sent immediately to all KDS displays with one chit titled '**Entrée**' along with 4 items, '**POTATO SKINS-> AS ENTREE**', RAZOR CLAMS, CRUSTED SALMON w/SALAD (required condiment) and PACIFIC SNAPPER w/SOUP (required condiment). When Course 4 (Entrée) is completed and bumped, it's removed for all KDS displays.



KDS Entrée chit

Configuration

EMC Configuration

Below are some EMC configuration steps that should be considered and programmed accordingly when setting up this KDS Course Override display capability.

- In EMC-> Setup-> Hardware/Interfaces-> General-> Order Devices-> Options-> KDS Options-> enable **[17 – Print Course Header]**
- In EMC-> Setup-> RVC Parameters-> Options-> General: disable **[50 – Enable Dynamic Order Mode]**
- In EMC-> KDS Controllers-> General Settings: enable **[2 - Display Next Course after Previous Course Complete]** Enter a '**2**' in the '**Wait for Prep Suborder**' field.
- In EMC-> Configuration-> Menu Items-> Menu Item Maintenance: Add Condiment menu items for Courses named something like;

  '**AS APPETIZER**'
  '**AS ENTREE**'

Add any additional menu items to apply Course names as desired.

- In EMC-> Configuration-> Menu Items-> MI Classes; Add MI Classes for Courses named something like;

  '**AS APPETIZER**'
  '**AS ENTREE**'

Add any additional Condiment MI Classes to be able apply Course name overrides as desired.

For each of these new Condiment MI Classes, perform the following;

- In EMC-> Configuration-> Menu Items-> MI Classes-> Options-> enable all of the following options;

[2 - ON = Condiment Menu Items; OFF = Regular Menu Items]

[8 - Allow Menu Items in this Class to be Non-Priced]

[45 - Use KDS Course Number]

[46 – Override KDS Course Number of Parent Class]

- In EMC-> Configuration-> Menu Items-> MI Classes-> General: KDS Course - set the appropriate course for each applicable MI Class
- In EMC-> Configuration-> Menu Items-> Print Classes: Create Classes that output to all of the desired KDS displays:

See also

KDS	KDS · Dynamic Order Mode · KDS Bump Bar · KDS Chit Layout Style · KDS Controller · **KDS Course Override Setup** · KDS Display Icons · KDS Display Status · KDS Display Types · KDS Highlight Scheme · KDS Programming Scenarios · KDS Setup for a Simphony Win32 Client · KDS Tool Bar · KDS Tool Bar and Bump Bar Functions · Upgrading a Restaurant Display Controller (RDC) for KDS v2.1
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KDS Display Status

This article reviews the 'KDS Display Status' controller and its use. It's now available for sites beginning with the release of Simphony v1.6 MR1.

Note: This feature does ***not*** currently exist in Simphony v2.x.

This article discusses a topic related to **hardware**.

This feature or functionality was introduced in Simphony v1.6 MR1.

This article discusses **configuration**, or various programming scenarios, or both.

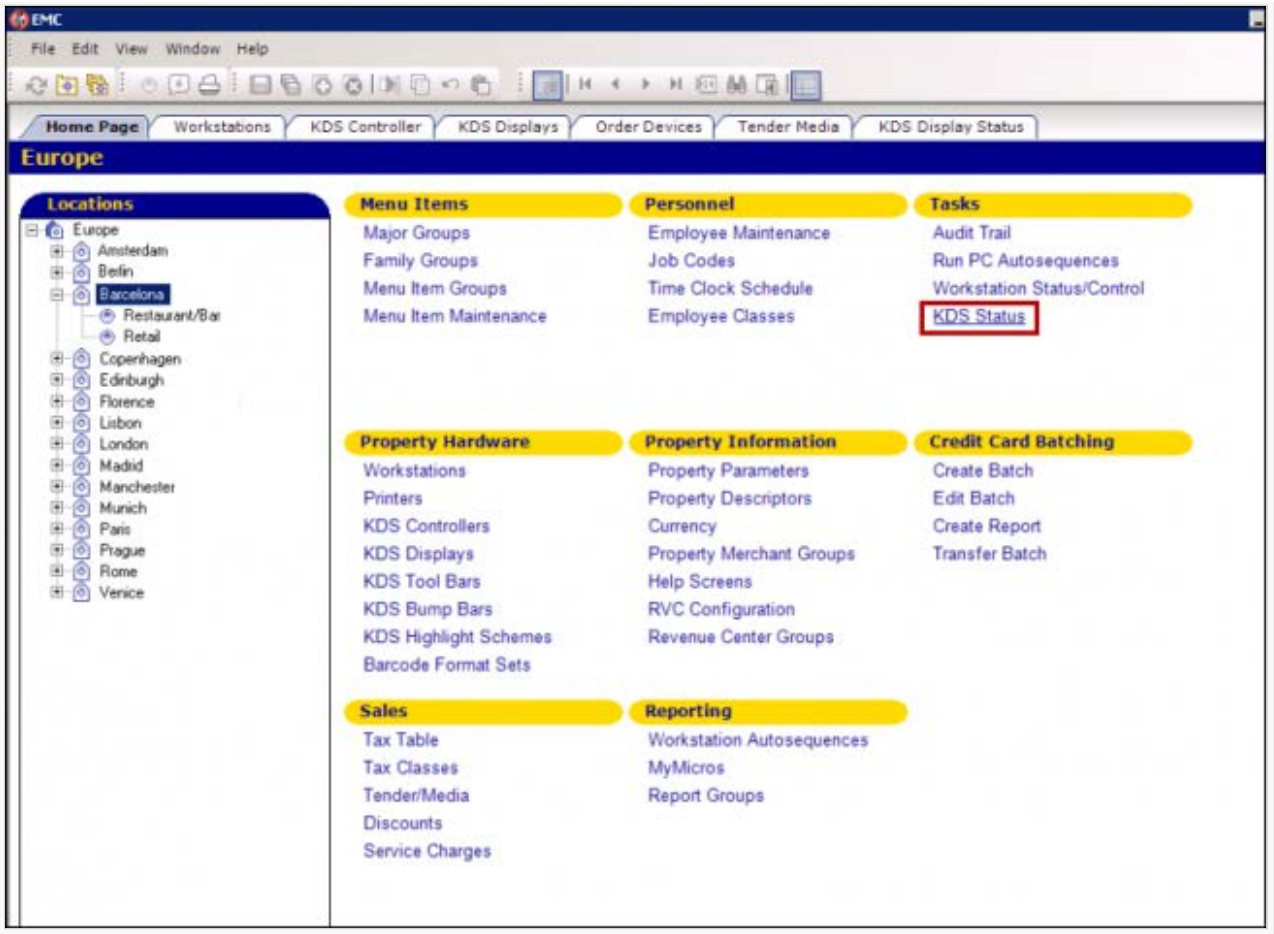
Contents

- 1 Overview
  - 1.1 Column Header Definitions
  - 1.2 Performing a KDS Status Search
- 2 See also

Overview

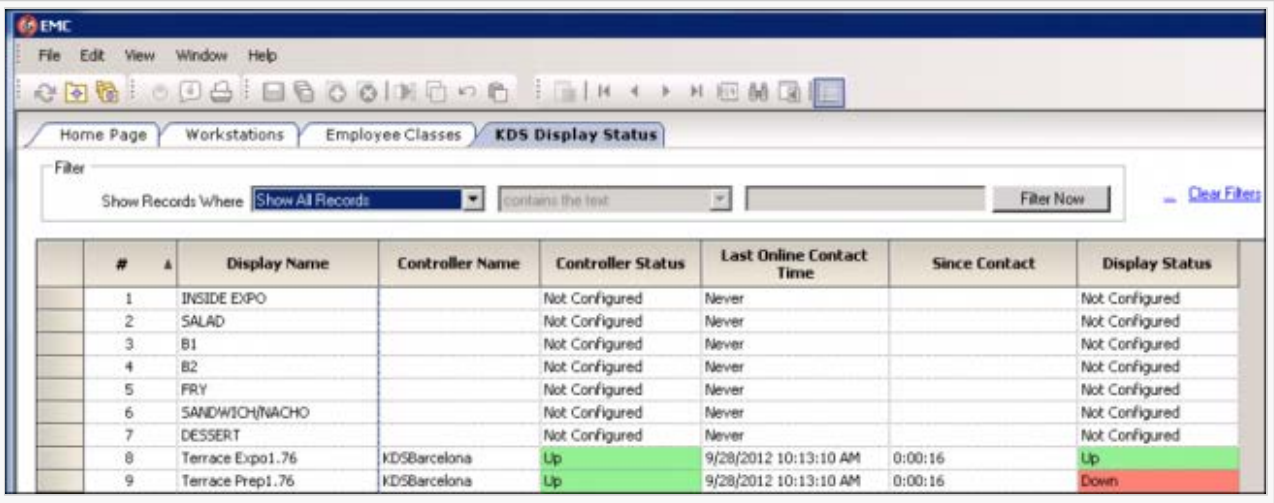
The ability for users to view and filter the connectivity status of a Property's KDS Displays and Controllers has been introduced. This should particularly assist users at larger Property's with many Revenue Centers in checking on the status of their KDS systems.

- A link to access a 'KDS Display Status' controller has been integrated at the following location: EMC-> Property level-> Tasks-> '**KDS Status**'.



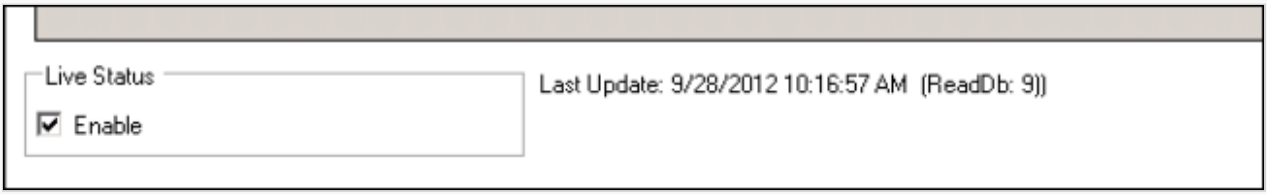
EMC-> Property level

- When opened, the default view ('**Filter**' header-> '**Show Records Where**'-> **Show All Records**) will list all of the selected Property's KDS Displays and KDS Controllers.



KDS Display Status tab

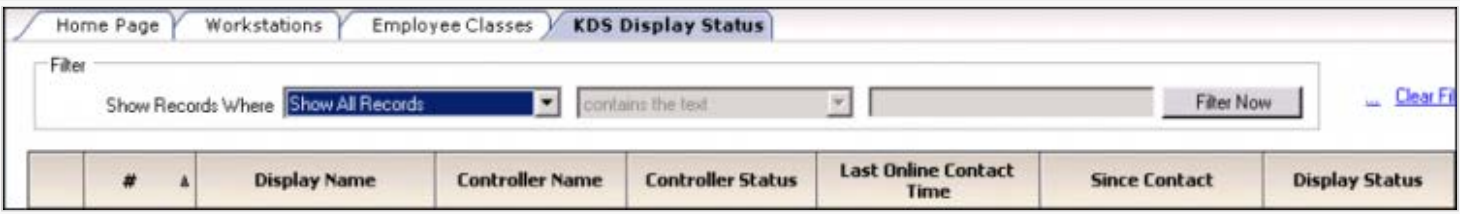
- On the bottom of the screen, there is a '**Live Status**' header with an '**Enable**' checkbox. Once the 'Enable' checkbox is selected, it starts the 'KDS Status' controller to run a check on the current status of all of the selected Property's KDS devices. By default, every 30 seconds, it will run a Property-wide KDS system check and then update the page.



KDS Display Status tab-> Live Status-> Enable checkbox

Warning: It is recommended that once a KDS Status check has been completed that the user ***unchecks*** (disables) the Live Status-> 'Enable' checkbox in order to prevent the unnecessary use of system resources.

Column Header Definitions



KDS Display Status tab-> Column Names

- The selected Property's KDS device record number

Display Name - This column displays the name of the KDS Display

Controller Name - This column displays the name of the KDS Controller

Controller Status - This column will display a KDS Controller's Status. There are three possible KDS Controller statuses. They are:

1. **Up** – (highlighted green) Running and functioning normally
2. **Unknown** - (highlighted yellow) An 'Unknown' status may be caused by any of the following scenarios:

    - No KDS Controller Status record in the database
    - A KDS Controller may be considered "**Not Configured**" if a KDS Display is not attached to the KDS Controller

Last Online Contact Time - This column displays the last contact time between the database and the KDS Controller while the KDS Controller was on-line. The KDS Controller periodically makes requests to obtain any changed records; during this

process, the ‘Last Contact Time’ for the KDS Controller is updated. This information is obtained from the database query that occurs at the interval determined by users when the ‘Live Status’ controller is enabled.

Note: This time is based upon the Local time setting of the Simphony Application Server.

Since Contact - This column displays the time elapsed since between the ‘Last Contact’ column and the current Date/Time.

Note: This value does not get updated in real-time; rather it updates at the interval determined by the last time the ‘Live Status’ controller was enabled by users.

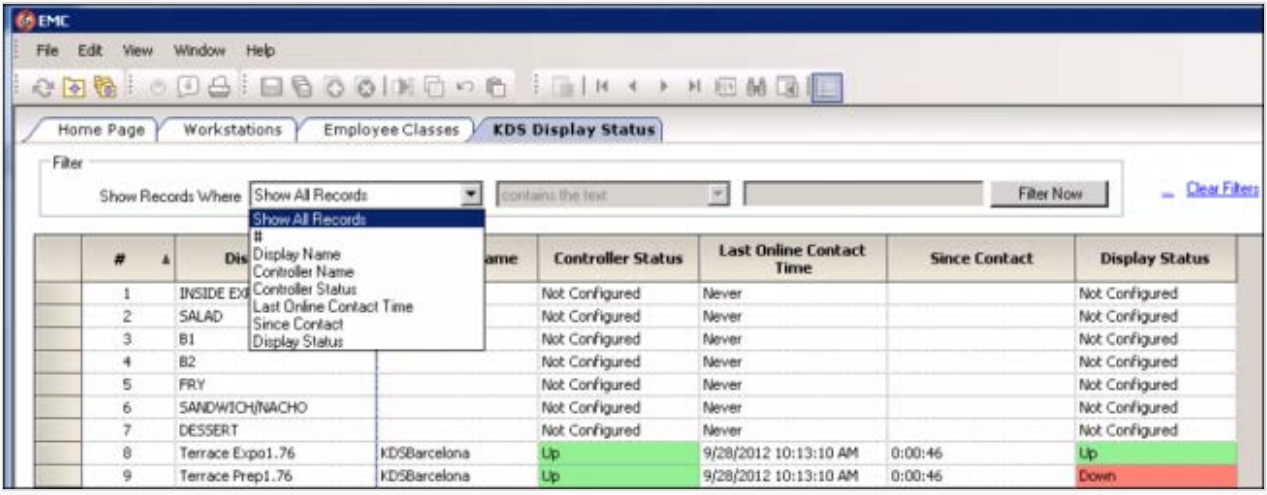
Display Status - This column will display the current KDS Display Status. There are three possible KDS Display statuses. They are:

1. **Up** - (highlighted green) Running and functioning normally
2. **Down** - (highlighted red) Not running
3. **Unknown** – (highlighted yellow) An ‘Unknown’ status may be caused by any of the following scenarios:

    - The KDS Display’s KDS Controller status for is ‘Down’ or ‘Unknown’.
    - There is no KDS Display Status record in the database.
    - A KDS Display may be considered “Not Configured" if it is not attached to a KDS Controller.

Performing a KDS Status Search

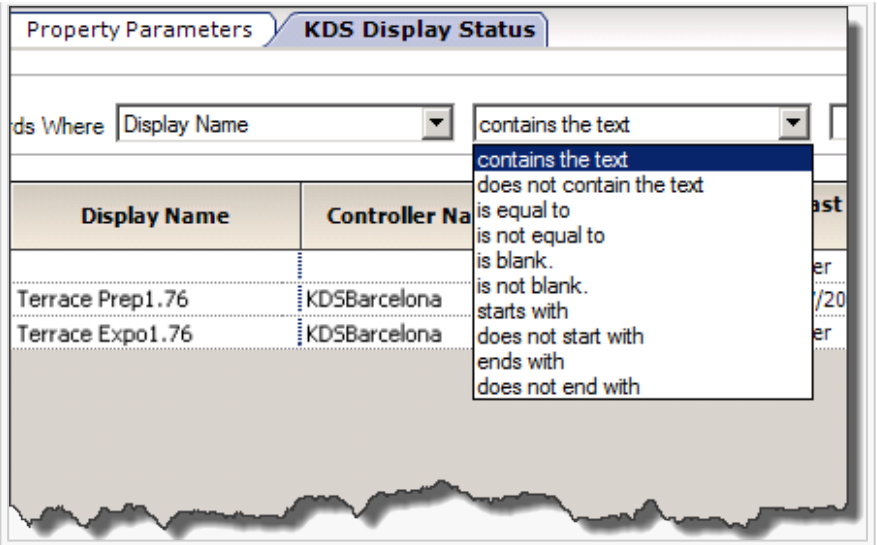
- Under the ‘Filter’ header, there is a drop-down menu named '**Show Records Where**' that provides numerous KDS device search filtering options to include the KDS Display record '**#**', '**Display Name**' and KDS '**Controller Name**' to list a few. All of the optional filtering choices are shown here:



KDS Display Status tab-> KDS Device Search Filter

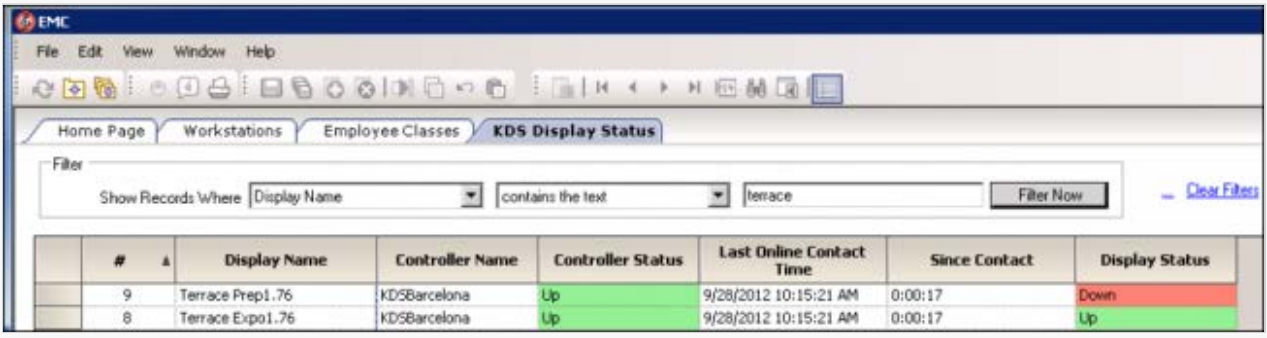
Accompanying the filtering choices is another drop-down menu that contains several text search variables that may further assist user’s in pinpointing specific text used in KDS device

naming conventions. The text search options are listed here:



KDS Display Status tab-> KDS Device Search Filter by text choices

- In this example, a user has filtered the search by '**Display Name**', '**contains the text**', '**terrace**' and then selects the '**Filter Now**' button. The search results are shown here:



KDS Display Status tab-> KDS Device Search Filter by text example

See also

KDS	KDS · Dynamic Order Mode · KDS Bump Bar · KDS Chit Layout Style · KDS Controller · KDS Course Override Setup · KDS Display Icons · **KDS Display Status** · KDS Display Types · KDS Highlight Scheme · KDS Programming Scenarios · KDS Setup for a Simphony Win32 Client · KDS Tool Bar · KDS Tool Bar and Bump Bar Functions · Upgrading a Restaurant Display Controller (RDC) for KDS v2.1

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KDS Display Types

A KDS Display can be configured as one of three different **Display Types**, based on the operation that the display is performing. The display types are: SOS Display, Expo Display, and Prep Display.

This article discusses a topic related to **hardware**.

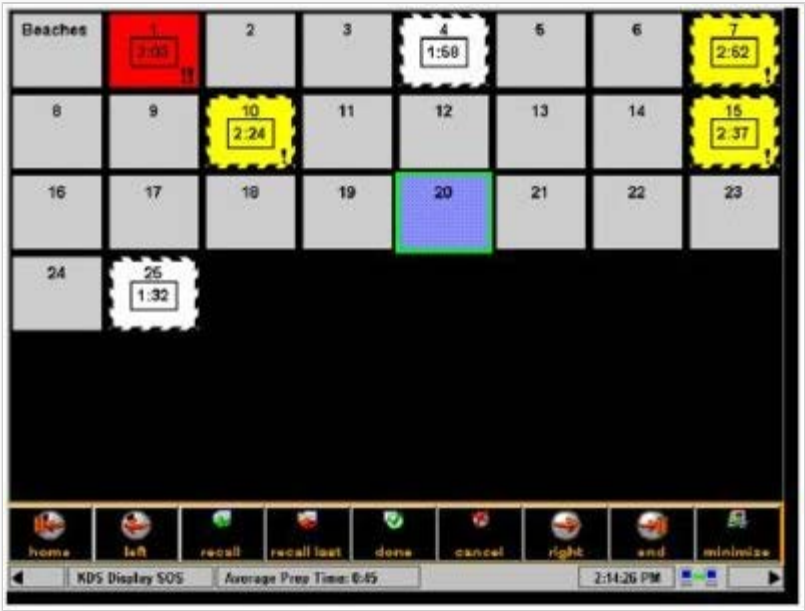
This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 SOS Display
- 2 Prep Display
- 3 Expo Display
  - 3.1 Order Device Options
  - 3.2 KDS Controller Options
- 4 See also

SOS Display

An "SOS Display" is a **Speed of Service** display. SOS displays allow managers to continuously monitor the status of all tables in the restaurant. The SOS display is divided into a grid, with each cell representing a different table. Double-tapping one of the table grids will show that table's check detail information as a chit image of the expo check (the SOS display is considered an Expo Display; the only difference is the initial grid that displays all the tables). The cells will change color to reflect the table status as guests are seated and orders are processed through the system. The color coding system is based on the following:



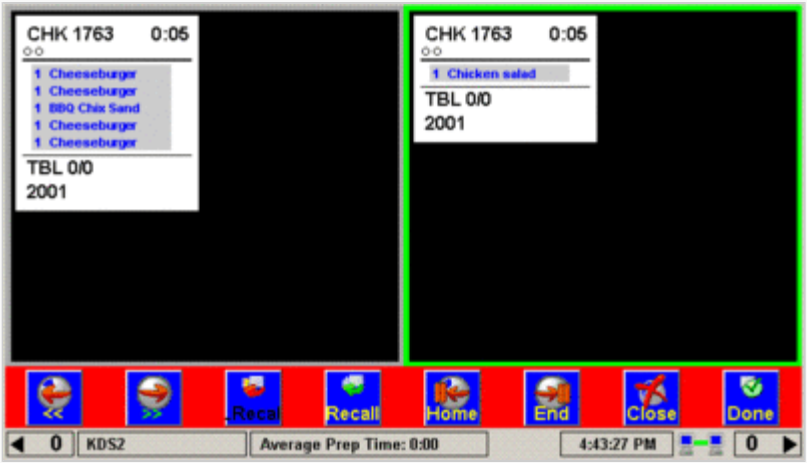
An SOS Display. The first cell shows the name of the Revenue Center. If this SOS was programmed to have multiple RVCs display, the next cell (fourth row, third column) would show the name of the second RVC, and all its tables would display after it.

Color	Status
Gray	The table is empty.
White, no timer displays	A check has begun for the table, but no active order is in the kitchen.
White, a timer displays	A check has been started and an appetizer (course 1) is on the active order chit that displays in the kitchen.
White,	A check has been started and there is no

timer displays with box	appetizer (course 1 item) on the active order chit that displays in the kitchen.
Yellow	The check has passed the first pre-defined Time Limit (configured in Order Devices).
Red	The check has passed the second pre-defined Time Limit.
Blue	The entree course (course 2) has been served and the only remaining course is dessert.

Prep Display

A **Prep Display** is the display type used most often. Prep Displays are used to display orders at preparation stations in the kitchen. Typically, a Prep Display will be named based on its function: "Hot Display", "Cold Display", or "Pizza Display". There are very few option bits that are specific to Prep Displays. In general, all Order Device options apply to either Expo or Prep Displays (unless the context sensitive help states otherwise). There is one Order Device option that is specific to Prep Displays:



A KDS Prep Display that is programmed to have two panels. In the configuration shown, hot items display on the left and cold items display on the right.

Print on Prep Done
: Enable this option to print a Runner Chit when the order is marked "done" at a Prep Station. Only items from this prep station will print. This option is only intended to be used on a Prep Display and it is only intended to be used in environments where there is no Expo Display.

Expo Display

The physical layout of an **Expo Display** screen can be identical to Prep Display screens, however, an Expo Display contains different functionality because of the task it is designed to perform. An Expo Display is intended to show all orders for the kitchen, allowing the expediter chef to control the flow of the orders and preparation times. Some specific options are related to this functionality:

Order Device Options

Print on Expo Done
: Enable this option to print a Runner Chit when the order is marked "done" at the Expo Station.

Print on All Prep Done
: Enable this option to print a Runner Chit when an order is complete at all prep stations and before the order is bumped from the KDS Expo Display. This option should only be used at Expo or SOS KDS stations.

Re-sort when All Prep Done
: Enable this option to cause the KDS Expo display to re-sort a chit to the beginning of the list of KDS chits on the Expo Display, when all prep displays for the chit are complete.

KDS Controller Options

Prevent chit bump on Expo display if chit exists on Prep display
: Select this option to prevent a chit from being bumped from an Expo display if the chit has not been bumped from one of the Prep displays. If this option is disabled, the system will not prevent a user from bumping a chit from the Expo display.

See also

KDS	KDS · Dynamic Order Mode · KDS Bump Bar · KDS Chit Layout Style · KDS Controller · KDS Course Override Setup · KDS Display Icons · KDS Display Status · **KDS Display Types** · KDS Highlight Scheme · KDS Programming Scenarios · KDS Setup for a Simphony Win32 Client · KDS Tool Bar · KDS Tool Bar and Bump Bar Functions · Upgrading a Restaurant Display Controller (RDC) for KDS v2.1
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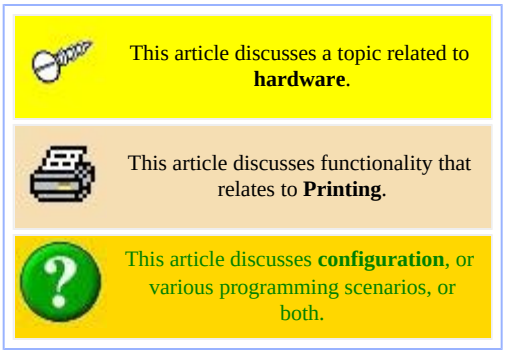
KDS Programming Scenarios

This article primarily discusses full-service restaurant scenarios. Quick Service Restaurants are more likely to use DOM functionality

This article discusses different methods of programming KDS displays for a revenue center. There may be other **KDS Programming Scenarios** than those listed here; however, this article covers the primary functionality that KDS offers.



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- 1 General Display Scenarios
- 2 Display Scenario: Menu Item Timing
  - 2.1 KDS Controller
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  - 2.3 Menu Items
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- 3 Display Scenario: Menu Item Coursing
  - 3.1 KDS Controller
  - 3.2 Menu Items
  - 3.3 Behavior
- 4 Display Scenario: Coursing and Timing
  - 4.1 Behavior
- 5 Runner Chits
- 6 General Options
- 7 See also

General Display Scenarios

There are various methods to display chits in a KDS system: Menu Item Timing, Menu Item Coursing, and others. These methods will be discussed on this page.

When KDS displays are being used as printer replacements (not utilizing special KDS features), there is no additional configuration needed. This printer-replacement configuration will not be discussed.

Display Scenario: Menu Item Timing

One feature of the KDS system is that menu items can be timed so that they are ready at the same time. For instance, a

Menu Item	Prep Time

restaurant may know the timing of the three items shown on the right:

Chicken Wings	8 minutes
Mozzarella Sticks	3 minutes
Shrimp Cocktail	2 minutes

Knowing this configuration, it is possible to have the Chicken Wings appear on the Hot Prep Display immediately. The Mozzarella Sticks will display on the Hot Prep Display 5 minutes later, and the Shrimp Cocktail will display 6 minutes later. This way, all items are done at the exact same time (8 minutes).

KDS Controller

These settings will be used for the examples; the colors chosen at a site may vary:

- Status Sent Color: **Gray**
- Status Fired Color: **Cyan**
- Status Bumped Color: **Green**

Order Devices

- For your **Hot Order Device** and **Cold Order Device**, set the following option bit to enabled: **[Single item per sub-order]**. The context sensitive help for this option says: *This option is enabled for KDS Menu Item Prep Timing. When enabled, menu items will print to this KDS Display based on prep time, so that all items are finished at the same time.*
- For your **Expo Order Device**, do not enable the option bit mentioned above.

Menu Items

- Chicken Wings definition: Prep time set for 8 minutes
- Mozzarella Sticks definition: Prep time set for 3 minutes
- Shrimp Cocktail definition: Prep time set for 2 minutes

What are the negative/positive settings? In general, all prep time are positive. Some condiment times might be programmed as negative. For instance, a "NY Strip" item is programmed as 7 minutes. The programmer knows that this is the prep time for a "medium" steak. A "rare" steak may only take 5 minutes — knowing this, the programmer would set "rare" to have a prep time of negative 2 minutes, so that a rare NY Strip's total prep time is 5 minutes.

Behavior

1. An operator orders the Chicken Wings, Shrimp Cocktail and Mozzarella sticks and Service Totals
2. Right away, the order device output is as follows:
    - The "Chicken Wings" item appears on the Hot display immediately. Its background color is **Cyan**.
    - All items appear on the Expo display immediately, on the same chit.
        - The "Chicken Wings" item appears in the **Cyan** color.
        - The "Mozzarella Sticks" and "Shrimp Cocktail" items appears in the **Gray** color.
3. After 5 minutes, the following events take place:
    - The "Mozzarella Sticks" item appears on the Hot display. Its background color is **Cyan**, and it appears on its

own chit.
    - The "Mozzarella Sticks" item (already being displayed) on the Expo display changes colors; its background color is now **Cyan**.
4. After 6 minutes, the following events take place:
    - The "Shrimp Cocktail" item appears on the Cold display. Its background color is **Cyan**, and it appears on its own chit.
    - The "Shrimp Cocktail" item (already being displayed) on the Expo display changes colors; its background color is now **Cyan**.

At any point that the cook at the Hot or Cold display finishes an item, he/she "bumps" it from the display using the KDS Tool Bar or KDS Bump Bar. When this happens, the item that was bumped displays on the KDS Display in **Green** background color. When all items on a single Expo chit are **Green**, the Expo Chef knows that the items on the check are ready to be served to the customer.

Display Scenario: Menu Item Coursing

Another feature of the KDS system is KDS Coursing. This method allows an operator to order items from both the appetizer course and the entree course at the same time, but the Order Devices won't show the items from the entree course until the appetizer course items have been "bumped" from their displays.

> *Note: While a Revenue Center allows up to 32 courses, KDS only recognizes two courses. Course 1 is treated as an appetizer course, and all other courses are treated as "other courses." Therefore, for KDS purposes, Course 2 behaves the exact same way as Course 3 (etc.).*

KDS Controller

To enable Menu Item Coursing, enable the KDS Controller option, **[Display next course only after previous course done]**. The Context Sensitive Help for this option is: *This option is used for systems using KDS Coursing functionality. When this option is enabled, menu items from course 2 will show on KDS Displays only after menu items from course 1 have been bumped.*

Menu Items

Menu Items are assigned courses in the Menu Item Class module. An example configuration is:

1. Create two classes, **Appetizers** and **Entrees**
    - For both classes, enable Option bit #45, **[Use KDS Course Number]**.
    - On the "General" tab for the classes, set the "KDS Course" field to the appropriate selection: 1-Appetizers or 2-Entrees. (Course names are assigned in the RVC Descriptors module.)
2. Assign Menu Items appropriately — Shrimp Cocktail (etc.) in the Appetizers class, and Filet Mignon (etc.) in the Entrees class.

Behavior

1. An operator orders Shrimp Cocktail and the Filet Mignon at the same time, and Service Totals.
2. Right away, the order device output is as follows:
    - The Shrimp Cocktail displays on its order devices: Cold Display and Expo Display.
3. After the cook at the Cold Display bumps the item, the following occurs:
    - The Filet Mignon displays on its order devices: Hot Display and Expo Display

Display Scenario: Coursing and Timing

The two scenarios described above, Menu Item Timing and Menu Item Coursing, can also be used in conjunction. The configuration is shown on the right.

Menu Item	Display	Prep Time	Course
Shrimp Cocktail	Cold	2 minutes	Appetizer
Chicken Wings	Hot	8 minutes	Appetizer
Meatloaf Platter	Hot	7 minutes	Entree
Chicken Alfredo	Hot	10 minutes	Entree

Behavior

1. An operator orders all the items listed above in the same service round: Shrimp Cocktail, Chicken Wings, Meatloaf Platter, and Chicken Alfredo
2. Right away, the order device output is as follows:
    - "Chicken Wings" appears on the Hot Display immediately.
    - "Chicken Wings" and "Shrimp Cocktail" items appear on the Expo Display.
        - "Chicken Wings" appear in the **Cyan** color
        - "Shrimp Cocktail" appears in the **Gray** color
3. After 6 minutes, the following events take place:
    - The "Shrimp Cocktail" item appears on the Cold display. Its background color is **Cyan**, and it appears on its own chit.
    - The "Shrimp Cocktail" item (already being displayed) on the Expo display changes colors; its background color is now **Cyan**.
4. **After both the Shrimp Cocktail and Chicken Wings items have been bumped from their respective displays, the next course displays on the KDS**
    - "Chicken Alfredo" appears on the Hot Display immediately.
    - "Chicken Alfredo" and "Meatloaf Platter" items appear on the Expo Display.
        - "Chicken Wings" appear in the **Cyan** color
        - "Meatloaf Platter" appears in the **Gray** color
5. After 3 minutes, the following events take place:
    - The "Meatloaf Platter" item appears on the Hot Display. Its background color is **Cyan**, and it appears on its own chit.
    - The "Meatloaf Platter" item (already being displayed) on the Expo display changes colors; its background color is now **Cyan**.

Runner Chits

A **runner chit** is a piece of paper that prints at a printer, allowing a food runner to know where to take the items (which table) and which items should be presented to which guest (seat number). Three options, all in the Order Device module,

control the behavior of Runner Chits:

Print Runner Chit on expo done
: Enable this option to print a Runner Chit when the order is marked "done" at the Expo Station. (This option is only intended to be used at a KDS Display that is an Expo Station.)

- When this is enabled for the Expo Station, the Runner Chit only prints after the chit has been bumped from the Expo Station.

Print Runner Chit on prep done
: Enable this option to print a Runner Chit when the order is marked "done" at a Prep Station. Only items from this prep station will print. (This option is only intended to be used on a Prep Display and it is only intended to be used in an environment where there is no Expo Display.)

- Based on the information in the Context Sensitive Help, you can see that this option does not apply in this situation. However, if no expo display existed in this environment, it is easy to see how this option bit behaves.

Print Runner Chit on all prep done
: Enable this option to print a Runner Chit when an order is complete at all prep stations and before the order is bumped from the KDS Expo display. This option should only be used at Expo or SOS KDS stations.

- When this is enabled for the Expo Station, the Runner Chit will print once the Chicken Wings and Shrimp Cocktail items have been bumped from their respective displays.

General Options

The options discussed in this section apply, in general, to all types of scenarios.

KDS Controller - Prevent chit bump on Expo display if chit exists on Prep Display
: Select this option to prevent a chit from being bumped from an Expo display if the chit has not been bumped from one of the Prep displays. If this option is disabled, the system will not prevent a user from bumping a chit from Expo display.

See also

KDS	KDS · Dynamic Order Mode · KDS Bump Bar · KDS Chit Layout Style · KDS Controller · KDS Course Override Setup · KDS Display Icons · KDS Display Status · KDS Display Types · KDS Highlight Scheme · **KDS Programming Scenarios** · KDS Setup for a Simphony Win32 Client · KDS Tool Bar · KDS Tool Bar and Bump Bar Functions · Upgrading a Restaurant Display Controller (RDC) for KDS v2.1
Learning series: KDS	

KDS Tool Bar and Bump Bar Functions

This article lists **KDS Tool Bar and Bump Bar Functions** that may be programmed for KDS Tool Bars and KDS Bump Bars.

This article discusses a topic related to **hardware**.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Functions
- 2 See also

Functions

Type	Description	Tool Bar Icon
Left	Use this function to scroll left.	
Right	Use this function to scroll right.	
Page Left	Use this function to scroll one page left.	
Page Right	Use this function to scroll one page right.	
Home	Use this function to navigate to the first chit on the display.	
End	Use this function to navigate to the last chit on the display.	
Done	Use this function to mark an order complete and delete it from the screen. If an order is marked done at a Prep Station, only the Prep Station display is affected. If an order is marked done at an Expo Station, it will be removed from all the displays in the kitchen. ***Note:*** *An order can be marked as done by double-clicking or*	

	double-touching on the display.	
Recall Last	Use this function to recall a bumped order to the appropriate display station. If an order is recalled from a Prep Station, only the prep station is affected. If an order is recalled from an Expo Station, it will be recalled to all of the displays that handled the original order. The last 50 orders for each station are available to be recalled; the Recall Last function will open the last order marked "Done".	
Recall	Use this function to recall a bumped order to the appropriate display station. If an order is recalled from a Prep Station, only the prep station is affected. If an order is recalled from an Expo Station, it will be recalled to all of the displays that handled the original order. The last 50 orders for each station are available to be recalled; the Recall function will open a list of every order marked done in the last 15 minutes (up to 50 orders).	
Summary Condensed	Use this function to display a consolidated list of active orders for the display station, without displaying condiments.	
Summary Expanded	Use this function to display a consolidated list of active orders for the display station, including condiment items.	
Cancel	Use this function to cancel the last action.	

See also

KDS	KDS · Dynamic Order Mode · KDS Bump Bar · KDS Chit Layout Style · KDS Controller · KDS Course Override Setup · KDS Display Icons · KDS Display Status · KDS Display Types · KDS Highlight Scheme · KDS Programming Scenarios · KDS Setup for a Simphony Win32 Client · KDS Tool Bar · **KDS Tool Bar and Bump Bar Functions** · Upgrading a Restaurant Display Controller (RDC) for KDS v2.1
Learning series: KDS	

Key Manager

This article discusses the EMC module. For a technical discussion about the Key Manager security feature, see Key Manager (technical)

Key Manager is an EMC module that allows the database encryption pass phrase and the transmission key to be changed. The database encryption pass phrase is used to encrypt secure data (credit card numbers, etc.) in the database; its value can be defined based on site security needs. The transmission key is the encryption scheme for network traffic; this key is not user-defined.

This article relates to programming of an EMC module.

This article discusses a topic related to **security**.

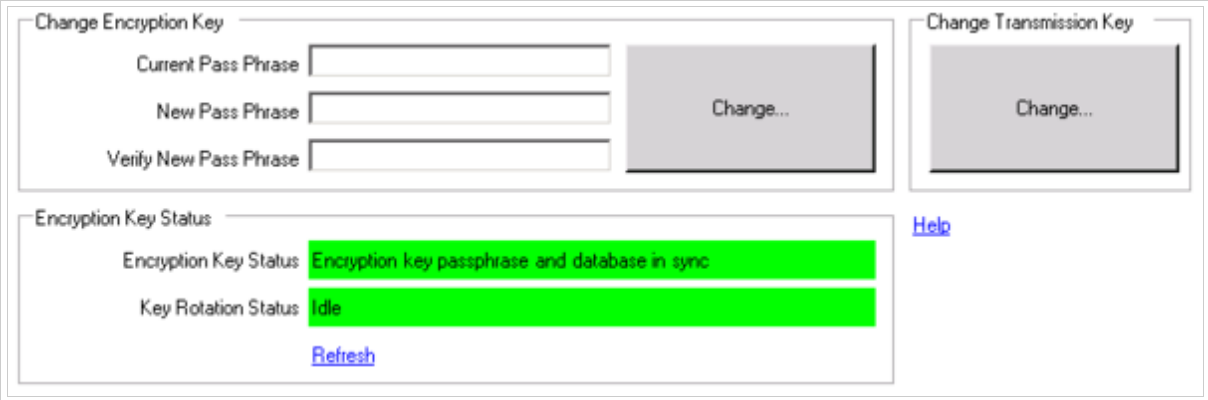
Contents

- 1 Encryption Pass Phrase
  - 1.1 Key Status
    - 1.1.1 Encryption Key Status
    - 1.1.2 Key Rotation Status
  - 1.2 Key Rotation
    - 1.2.1 Simphony 1.6 or higher
    - 1.2.2 Warning
  - 1.3 Changing the Pass Phrase
- 2 Transmission Key
- 3 Privileges

Encryption Pass Phrase

Key Status

To access the the '**Key Manager**' utility navigate to the EMC (Enterprise level)-> Tasks-> and click on the 'Key Manager' link. The '**Encryption**



EMC's Key Manager module.

Key Status' group box diplays the current status of the 'Encryption Key' and of the 'Key Rotation':

Encryption Key Status

- Encryption key pass phrase and database in sync - This message displays when the system is functioning normally.
- Warning: Encryption key pass phrase and database not in sync! - This message displays when the system detects that the transaction database and key database are out of sync. One possible cause is that someone restored an old transaction database that is not in sync with key database. When this happens system will generally experience problems with encryption-related transactions, such as credit card authorizations.
- Status cannot be determined - This message displays when either database (transaction database or key database) is not accessible, thus EMC can not read data successfully from both databases to determine the sync status.

Key Rotation Status

- Idle - There is no key rotation being performed.
- In progress... - The key is currently in the process of being rotated
- Status cannot be determined - This message displays when EMC fails to read the rotation status out of transaction database.

Key Rotation

Simphony 1.6 or higher

With the release of Simphony v1.6 or later, including Simphony v2.x, a new Key Rotation scheme will be in use. The SDATA1 and SDATA2 databases will no longer be used. The keys and passphrase will now be stored in MCRSCACHE. During an upgrade to Simphony v1.6 or later, the Key Manager tool will be automatically run.

It will perform the following operations:

- Create the new key DB schema (in MCRSCACHE).
- Extract the encryption keys and passphrase from SDATAs (if they were formerly in use).

Warning

Warning: *Prior* to performing an **upgrade** from an earlier application version (e.g., from Simphony v1.5 to Simphony v1.6) ***or*** running the **Key Manager Tool**, it is ***strongly*** recommended that:

- All existing Credit Card records have been batched and settled.

- The existing database has been backed up.

- It is also recommended that all open checks be closed before performing the upgrade.

Changing the Pass Phrase

To change the pass phrase, the user (or users) must know the current pass phrase. When a Simphony system is initially installed, its default pass phrase ***must be changed***. The default pass phrase is `DEFSIMP1.0`.

Note: If the pass phrase is lost, the encrypted data in the database is unrecoverable. ***There are no back doors.*** Contact your MICROS Account Manager in the event of such an occurrence.

There are some important considerations when changing the pass phrase:

- The pass phrase must be 1 to 24 characters long.
- The pass phrase and confirm pass phrase must match
- The database must be accessible
- IIS and the Simphony EGateway Service must be running.
- The process of key rotation runs in the background so that it does not require the system to be down during the key rotation process.

Transmission Key

A transmission key is used for encryption of traffic between a workstation and the data center. When the transmission key is rotated, the data center generates a new key; when a client communicates with the data center, it is given a new key for all subsequent communications to be encrypted.

Privileges

Users may access the Key Manager module only when associated with an Enterprise Role with the **[Key Manager]** action enabled. Typically, this module is restricted to administrator-type employees only — generally, only two or three employees in the entire Enterprise may access this module.

Languages

Contents

- 1 Employee Privileges
- 2 EMC Configuration
  - 2.1 Translation Tool
    - 2.1.1 Text File Type
      - 2.1.1.1 Import
      - 2.1.1.2 Export
  - 2.2 Filter Options and Search
  - 2.3 Copying Text Elements
    - 2.3.1 Copy All Translations
    - 2.3.2 Copy Selected Translations
- 3 See also

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses general MICROS knowledge and/or **terminology**.

Employee Privileges

Employee Role privileges control who can open and modify the text files. A privileged user is able to translate the EMC prompts and context sensitive help into the language that is understood by the end user (cashier) who is signed to the workstation.

1. Navigate to *EMC-> <Enterprise>-> Configuration tab-> Roles-> **Actions tab***.
2. In the Text Translations section, check the desired privileges:

- **EMC Text Translations** – When checked, users can translate the EMCText file.
- **Workstation Text Translations** – When checked, users can translate client workstation-related text files (such as OPSText).

EMC Configuration

Translation Tool

The Translation tool translates the user interface into the local language and maintains all possible translation files in EMC. In Ops, you can translate, manage, and maintain the Simphony Ops user interface messages for client workstations. The Translation tool also upgrades older versions of translation files into newer versions.

The **Translation** tool was introduced in Simphony 2.7 GR.

The Translation tool translates any language that is defined within the system. Core translation files are managed by the Simphony R&D team and should not be translated. The Simphony installation application updates existing translations and creates any new language files automatically.

Navigate to *EMC-> <Enterprise>-> Setup tab-> Languages-> **Translation tab***.

Text File Type

Translation files are from either a previously installed version of Simphony or a newer Simphony version. This functionality allows you to create a translation file using a previous version of Simphony and import it into a system that is running a newer version of Simphony.

Select the type of file you wish to view, edit, import, or export. The following XML text files are available:

- EMC Text
- OPS Text
- POS Core Text
- MICROS Payment Cash
- MICROS Payment Credit/Debit
- MICROS Payment Demo Credit/Debit
- Custom

Import

1. Select **Import from a File** to import a translated XML file into the selected language in Simphony.
2. In the Open dialog, browse to the directory and open the desired language text file. The language label in the file name may not match the names of the languages in the destination system, so you can either select one of the existing languages or create your own. For example, the import file was created on a system whose base language is English and the exported translation file created from that system is for German. The person using that file is importing the translations into a system with a base language of German (or Deutsch as the Germans spell it). The label in the imported file will not match the label in the destination system, but the translations will be correct.
3. A Translation pop-up requests confirmation of the languages. Click **Yes** to proceed with the import. The selected XML file is imported into the Text Elements grid section of the Translation tab.

If the imported file is incomplete – it does not contain a translation for every possible field that could be translated – the Translation tool updates the fields that are defined in the file and leaves the rest untranslated.

The imported file contains a Simphony version field so that when the information is loaded into the destination system, if the field's base (default) language changed, you may need to update the translated text that was brought into the system. For example, a translation was imported from a v2.3 system into a v2.7 system. The default translation was updated in v2.5. After the import is complete, you can tell that the default language information changed and the translation should be reviewed.

Export

1. Select **Export to a File** to save the XML text file so it can be imported into another system.

2. In the Export To dialog, browse to the desired local directory and save the language text file. The default file name appends the language to the end. For example, if the language is French, the exported default file name is OPSText_French.

Filter Options and Search

1. Use the following filters to limit the information shown in the Text Elements window.
   - **No Translations**: shows original text without translation
   - **Changed in Current Version**: shows text that was modified in the current version of Simphony
   - **New in Current Version**: shows text that was introduced in the current version of Simphony

   If you check more than one filter option, the search results must meet multiple conditions. For example, **No Translations** and **New in Current Version** show records that are not translated AND were added in the current version of Simphony.

2. Search translations using the field name, text or help, along with the **Exact** or **Contains** options.
3. Click **Apply Filter** to use the selected settings or click **Clear Filter** to remove them

Copying Text Elements

Copy All Translations

This feature allows you to copy all translations made under the selected language.

1. Click **Copy All Translations**. A pop-up appears to select the language the translations should be copied from.
2. Select a language and click **OK**. All translations are copied over from the selected language.

Copy Selected Translations

This feature allows you to copy some of the translations made under the selected language.

1. Select the desired record(s) in the Text Elements section.
2. Click **Copy Selected Translations**. A pop-up appears to select the language the translations should be copied from.
3. Select a language and click **OK**. Translations for the selected record(s) are copied over from the selected language.

See also

Printing Right To Left Reading Languages

License Counts

Beginning with Simphony version 2.7 MR6, a new License Configuration tab is available in the Enterprise Parameters module for you to enter the number of licenses that you purchased for:

- Workstation Clients
- KDS Clients
- Engagement Clients
- Transaction Services Clients

In addition to entering the license count, you can:

- Append new purchases to existing license counts.
- Compare the number of licenses purchased with the number of clients configured side by side.
- See an overview of property, revenue center, workstation, KDS, Engagement, and Transaction Services client configurations.

Configuring Simphony Licensing Count

1. Access the EMC, select the **Enterprise,** select **Enterprise Parameters**, and then click the **License Configuration** tab.
2. Click **Configure** adjacent to Workstations Client License Count**.**
3. If you want to add a new license count:
   a. Select **Set new license count**.
4. If you want to append licenses to an existing license count:
   a. Select **Add to the existing license count**.
5. Enter the number of client licenses you purchased.
6. (Optional) Enter additional details regarding the purchased license in **Reference** and click **OK**.
7. Repeat Steps 2-6 for **Engagement Client License Count, Transaction Service Client License Count,** and **KDS Client License Count**, and then click **Save**.
8. Click **Yes** when prompted for confirmation.

Viewing Enterprise Information

1. On the **License Configuration** tab, click **View** adjacent to the Properties, Revenue Centers, Workstations Client License Count, Engagement Client License Count, Transaction Services Clients, or the Kitchen Display System Clients label.
2. Save the changes.

Local Order Receipt

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

Local Order Receipt Printing is a method of programming an order device to route print jobs to a different printer based on the workstation that is sending the print job. This method of printing is often used in environments where a wine steward or sommelier retrieves bottles of wine for the wait staff. In this type of environment, a user at Workstation A has his wine chit print at the printer attached to Workstation A, while a user at Workstation B has her wine chit print at the printer attached to Workstation B. After the chit prints, the user hands the chit to the wine steward, who retrieves the bottle.

Contents

- 1 EMC Configuration
  - 1.1 Order Devices
  - 1.2 Workstations
- 2 Other Uses
  - 2.1 Local Order Device as a Backup
  - 2.2 Room Service
- 3 See also

EMC Configuration

Order Devices

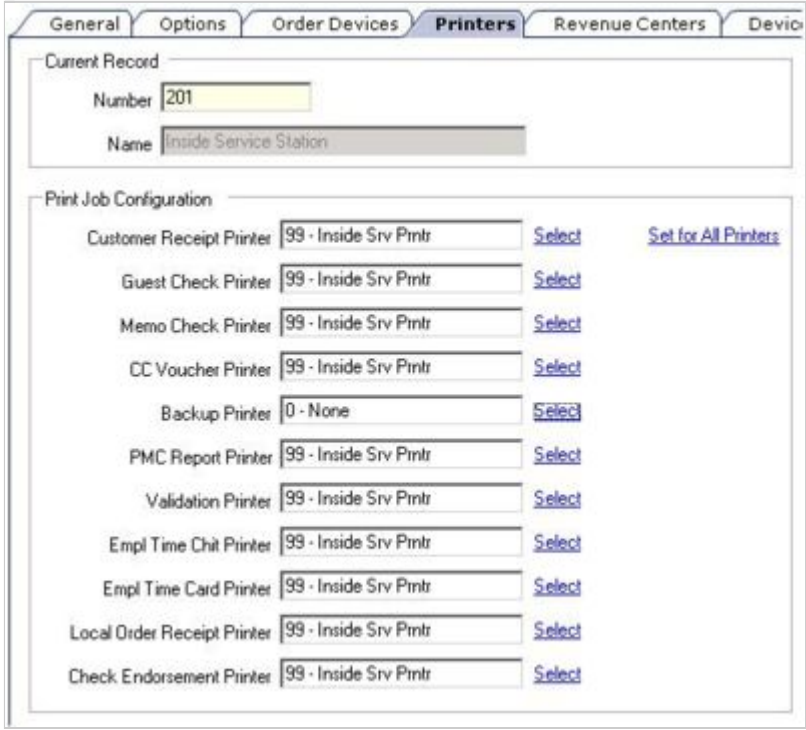
In the Order Devices module of EMC, each order device can be configured as Local or Remote. When "Local" is chosen, it is not possible to select the physical device or backup device; indeed, this is the point of the Local Order Receipt. When this device is set as a "Local" device, orders will print at the physical workstation that is programmed as the "Local Order Receipt Printer" for the workstation. The Workstation configuration is discussed below.

An Order Device programmed as a "Local" device type.

Workstations

In the EMC Workstations Module, each workstation is assigned printers for different types of print jobs. Typically, the same printer is used for all print jobs, and it is usually the case that the printer is physically attached to the workstation.

In the image shown, the "Inside Service Station Printer" is configured to use the "Inside Srv Prntr" as its Local Order Receipt Printer. In the Order Device image above, the "Wines Printer" is configured as a Local Device Type. This means that any order sent to the "Wines Printer" will print at the "Local Order Receipt Printer" for the workstation. In the example of the workstation displayed in the image, the order will print at the "Inside Service Printer".



The "Inside Service Station Printer" is programmed as the Local Order Receipt Printer for this workstation.

Other Uses

Local Order Device as a Backup

In some databases, the Local Order Device is used as a backup method in cases where an entire network goes down. In these databases, there are often two Order Devices programmed as "Local" Device Types: one for "All Food" and one for "All Liquors." Further programming includes:

#	Order Device Header	Device Type	Primary Device Type	Device Number	Backup Device Type	Backup Device	Order Device Redirect
1	Kitchen Hot Printer	Remote	Printer	0 - None	Printer	0 - None	1 - Kitchen Hot Printer
2	Kitchen Cold Printer	Remote	Printer	0 - None	Printer	0 - None	2 - Kitchen Cold Printer
3	Kitchen Expo Printer	Remote	Printer	0 - None	Printer	0 - None	3 - Kitchen Expo Printer
4	Local Order Device - All Food	Local					0 - No Output

A typical Revenue Center that uses the "Local Order Device" for a backup. Note that the "Local Order Device - All Food" printer is initially redirected to No Output.

- Both of these Order Devices are redirected to "0 - No Output"
- The Menu Item Classes for food and liquor items are programed to print to the appropriate "All Food" or "All Liquors" printers

With this configuration, a manager can redirect the order output of the order device through PMC if the network should fail or if a remote printer cannot be reached for some other reason. The manager sets the redirect:

- The unreachable printer is set to "0 - No Output"
- The Local printer is redirected to itself (See Order Device Redirection)

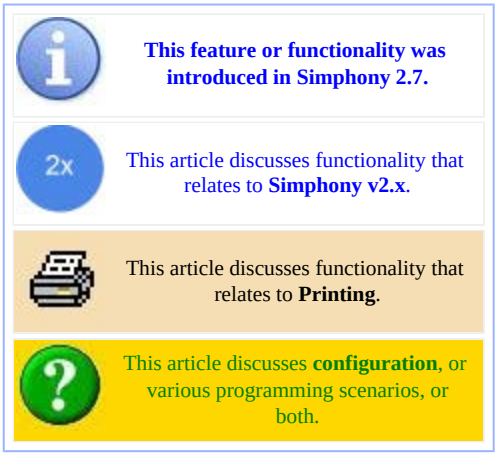
Now that the order prints locally, the order chit will print at the Local Order Receipt Printer, and the operator can walk the receipt to the kitchen for preparation.

Room Service

Local Order Receipt Printers are often programmed in Room Service Revenue Centers (with configuration similar to the last section), where one printer prints every Menu Item on the order.

Logo Printing in Simphony 2.x

With the release of Simphony v2.7 GR, you can now print the logo of your enterprise, property, or revenue center on guest checks and customer receipts.



Contents

- 1 Supported Images
- 2 Supported Printer Matrix
  - 2.1 Uploading the logo to Simphony
  - 2.2 Assigning the logo to Guest Checks/Customer Receipts of the Enterprise, Property or a Revenue Center
  - 2.3 Configuring the printers to print the logo
  - 2.4 Setting up the IDN/Serial Printer
    - 2.4.1 IDN
    - 2.4.2 Serial
- 3 Troubleshooting
- 4 See Also

Supported Images

Simphony only supports monochrome bitmap image files. Use Microsoft Paint to convert an image to a monochrome bitmap. Adhere to the following rules for governing the size of your logo:

- The image area must not exceed 98,304 pixels
- The image width must not exceed 512 pixels
- The image height must not exceed 384 pixels
- The bitmap file must not exceed 8 kilobytes in size

Keep in mind that a logo that is 512 x 384 pixels would exceed 98,304 pixels.

Supported Printer Matrix

The following table lists the supported printers, required printer firmware, and supported workstation platforms.

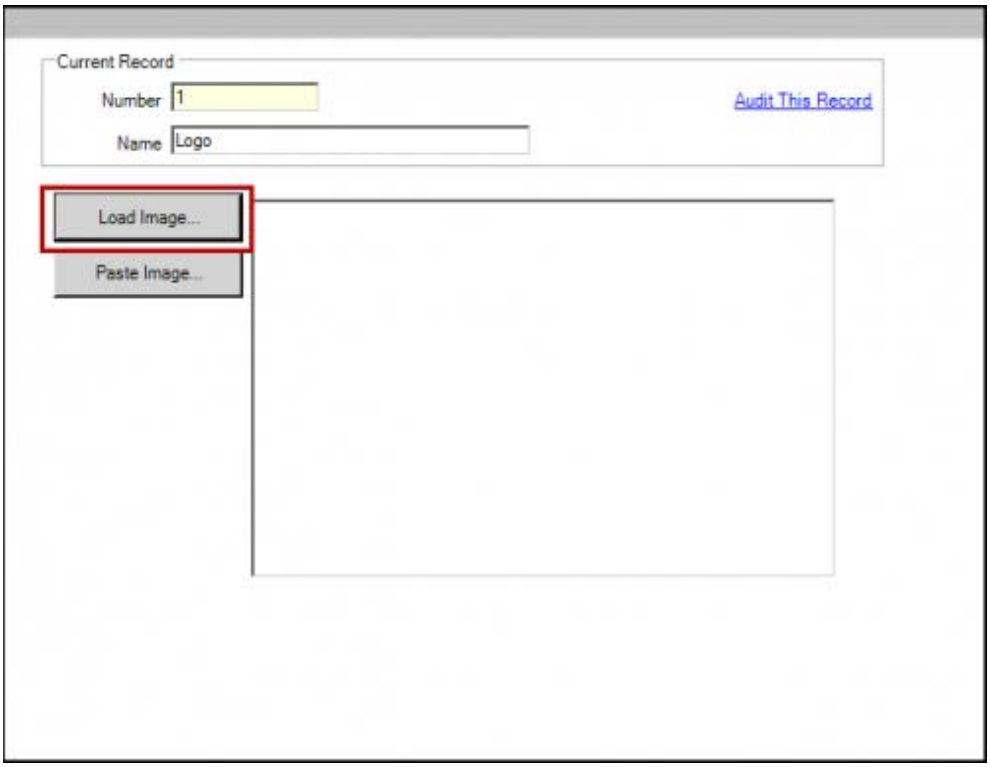
Printer Models / Printer Firmware	Module Firmware	Windows 32	Windows CE	iOS	Android	Comments
Epson TM-T88 II, III, IV and V IDN / ESC/POS II 3.14+, III	v1.15 and higher	Yes	Yes	iOS iPad workstations cannot be	Android tablet workstations	-

7.00+, IV 10.04+, V 30.12+				configured as print controllers for IDN printers. In order to print, you need to point to another workstation that serves as a print controller.	cannot be configured as print controllers for IDN printers. In order to print, you need to point to another workstation that serves as a print controller.	
Epson TM-T88 II, III, IV and V Serial / ESC/POS II 3.14+, III 7.00+, IV 10.02+, V 30.12+	Not applicable for Serial Module	Yes	Yes	iOS workstations cannot be configured as print controllers for serial printers. In order to print, you need to point to another workstation that serves as a print controller.	Android workstations cannot be configured as print controllers for serial printers. In order to print, you need to point to another workstation that serves as a print controller.	-
Epson TM-T88 II , III, IV and V IP E4 / ESC/POS II 3.14+, III 7.00+ & III ML IP 7.03+, IV 10.04+, V 30.12+ & V ML IP EML01+	v1.01 and higher	Yes	Yes	iOS workstations cannot be configured as print controllers for IP printers. In order to print, you need to point to another workstation that serves as a print controller.	Yes	-
Epson Mobilink TM-P60 Thermal Bluetooth Printer / ESC/POS 2.02+		Yes	Yes	iOS workstations cannot be configured	Yes	The newest TM-P60 iOS

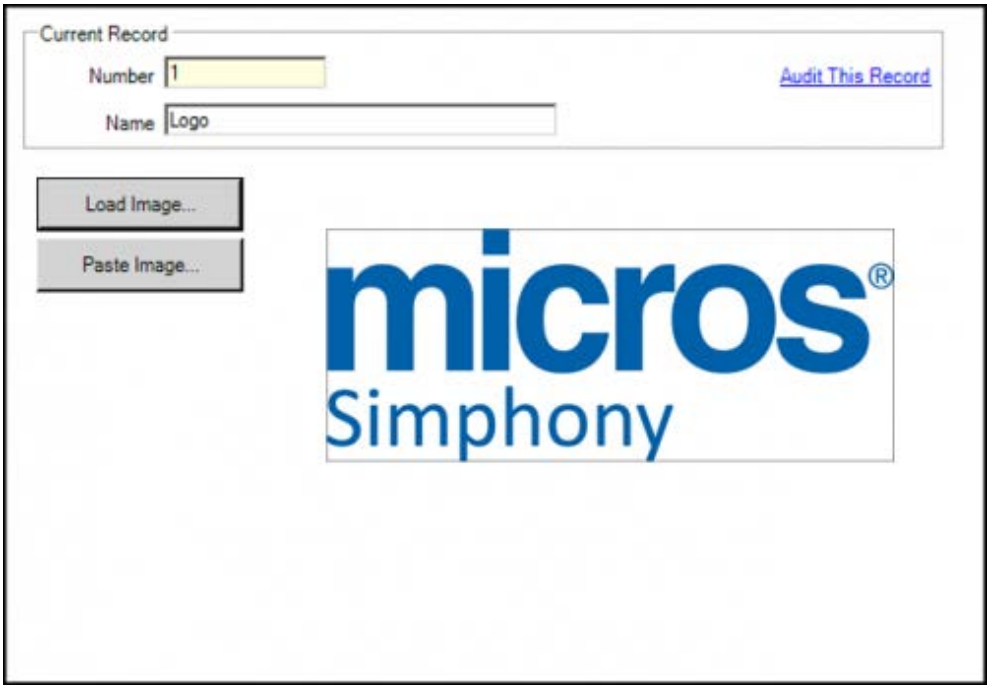
				as print controllers for TM-P60 printers. In order to print, you need to point to another workstation that serves as a print controller.		compatible (serial S) printer model is not supported. Bluetooth printers print text with a 32 column width.
Epson Mobilink TM-P60 Thermal Wireless Printer / ESC/POS 2.02+		Yes	Yes	iOS workstations cannot be configured as print controllers for TM-P60 printers. In order to print, you need to point to another workstation that serves as a print controller.	Yes	Bluetooth printers print text with a 32 column width.

Uploading the logo to Simphony

1. Navigate to the *EMC-> Enterprise level-> Configuration tab-> Enterprise Information->* ***Print Logos*** module.
2. Click **Insert** on the toolbar and add a new record.
3. Navigate to Form View.
4. Click **Load Image**.



5. Select the logo and click **Open** to upload it to Simphony. Once uploaded, a preview of the image appears on the preview window.

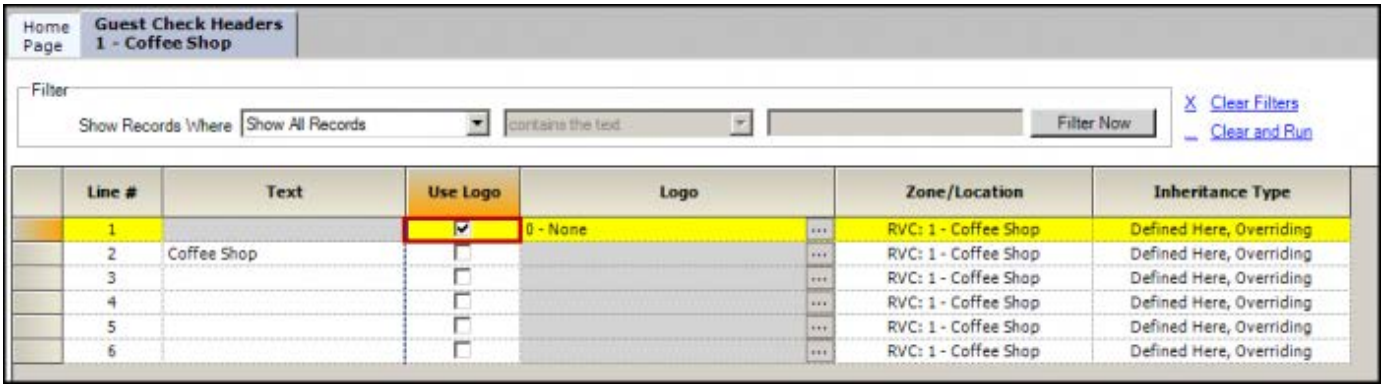


You can also copy an image to your clipboard and click **Paste Image** to upload it to Simphony.

6. Click **Save**.

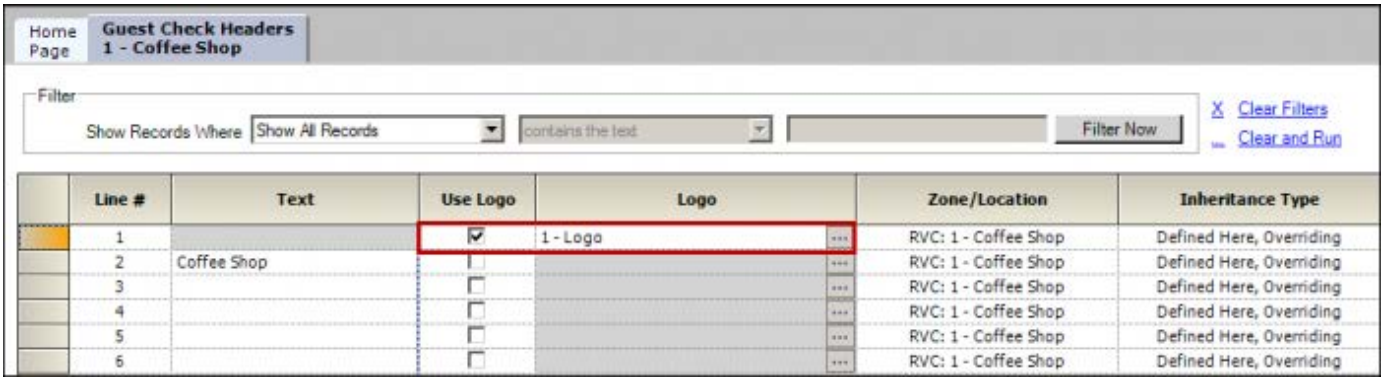
Assigning the logo to Guest Checks/Customer Receipts of the Enterprise, Property or a Revenue Center

1. Navigate to the *EMC-> <Enterprise / Property / Revenue Center> -> Headers/Trailers ->* ***Guest Check Headers*** module.
2. Select a check box under the **Use Logo** column. This enables the Logo column. If you enable **Use Logo** for an existing record that has content within the Text column, that text no longer appears on printed guest checks and customer receipts.

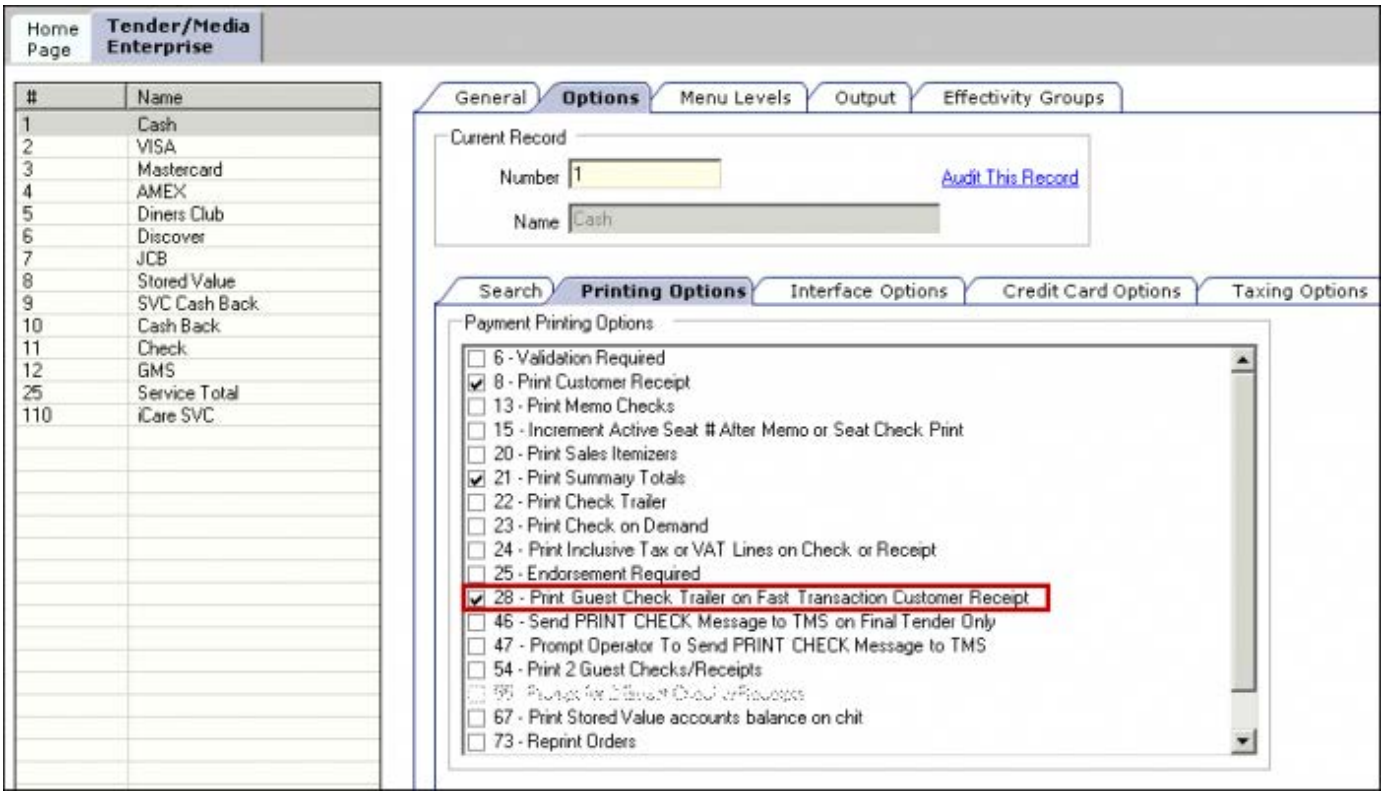


3. Click the ··· button in the **Logo** column and select the previously uploaded logo from the Select Logo dialog.

4. Click **Save**.



You can configure the **HeadersCustomer Receipt** module and **Guest Check Trailers** module in a similar manner. Additionally, there is an option named **[28 – Print Guest Check Trailer on Fast Transaction Customer Receipt]** located in the *EMC - > <Enterprise/ Property> -> Configuration tab -> Sales -> Tender/Media -> **Options*** tab that must be enabled on specific Tender/Media records in order for trailers to print on customer receipts when that tender is utilized.



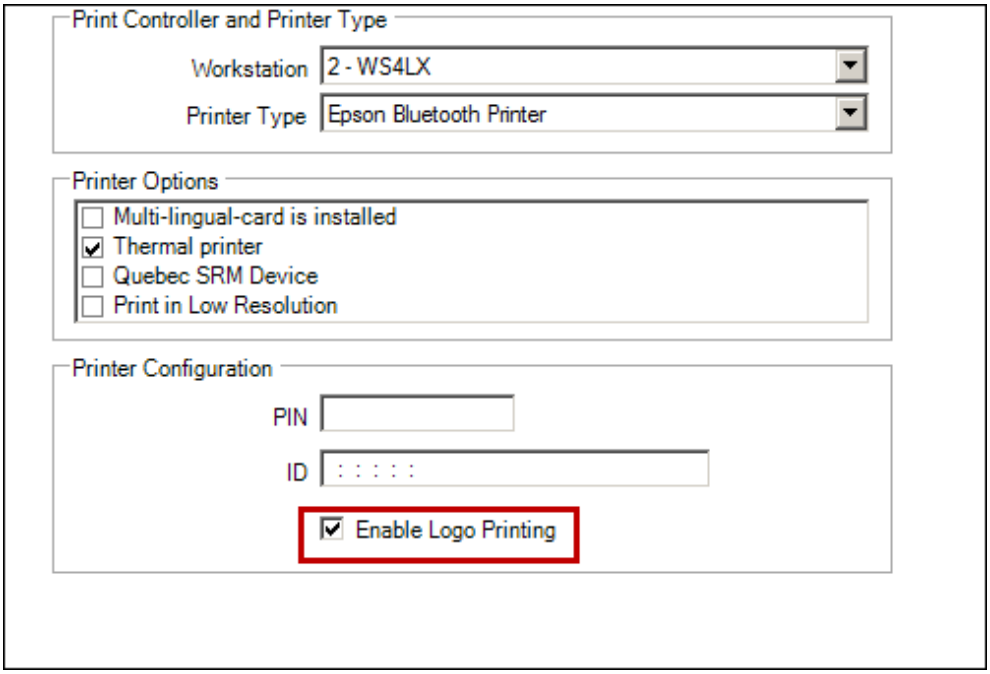
Configuring the printers to print the logo

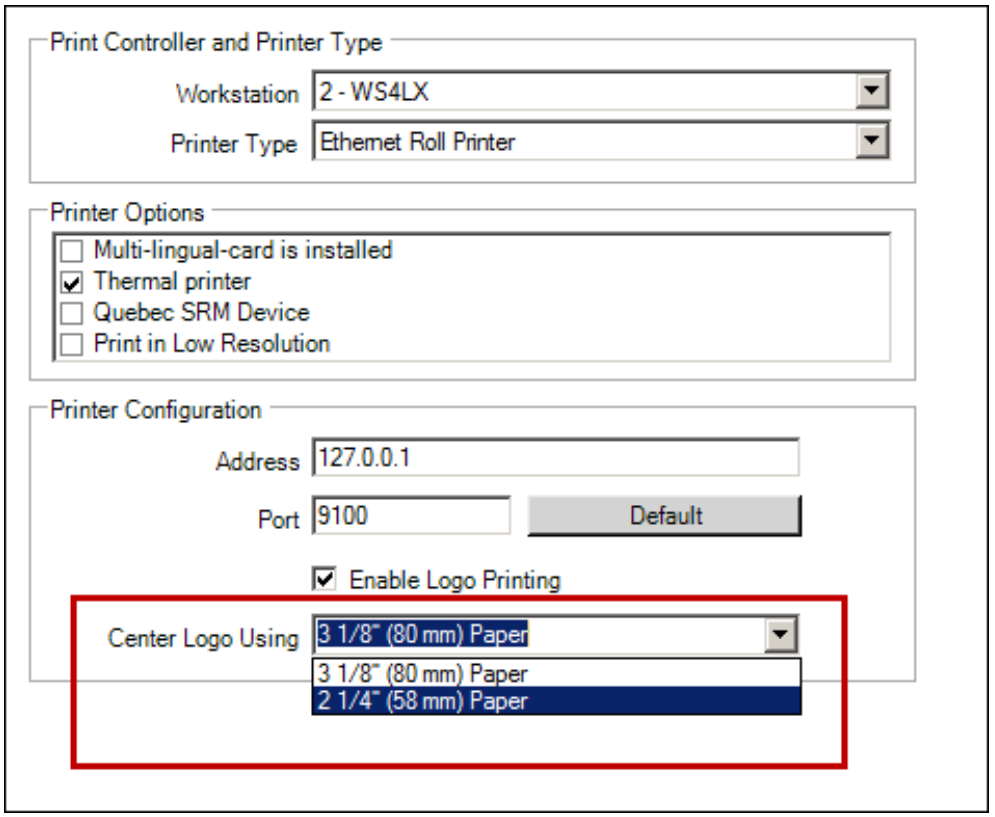
There is no global method to enable logo printing for all printers in a property/revenue center— you need to individually configure each printer.

1. Navigate to the *EMC-> Property level-> Setup -> Hardware/Interfaces-> Clients and Printing-> **Printers*** module.
2. Navigate to the Form View of the desired printer.
3. Under the Printer Configurations header, enable the **Enable Logo Printing** option.

When configuring Epson TM-P60 and TM-T88 Ethernet Thermal printers, you must also configure the logo to print in the center of the guest check/customer receipt by selecting the paper size of the printer from the **Center Logo Using** drop-down menu.

For Epson TM-P60 Ethernet Thermal printers, set the paper size to 2 1/4" (58mm), and for Epson TM-T88 Ethernet Thermal printers set the paper size to 3 1/8" (80mm).





4. Click **Save**.
5. Reload the workstation to apply the changes.

Setting up the IDN/Serial Printer

The following steps are specifically for IDN and serial printers.

IDN

1. Navigate to the *EMC-> Property level-> Setup -> Hardware/Interfaces-> Clients and Printing->* ***Printers*** module.
2. Insert a printer.
3. Enter information in the following fields:

   - **Workstation** - Select a workstation that will serve as the print controller for the printer
   - **Printer Type** - IDN Roll Printer
   - **Thermal printer** - Select this box
   - **COM Port** - COM4
   - **Baud Rate** - 9600 (default)
   - **Parity** - None
   - **Data Bits** - 8
   - **Stop Bits** - 2
   - **IDN ID** - 1
   - **Enable Logo Printing** - Select this box

4. Click **Save**.

Serial

1. Navigate to the *EMC-> Property level-> Setup -> Hardware/Interfaces-> Clients and Printing->* ***Printers*** module.
2. Insert a printer.
3. Enter information in the following fields:

   - **Workstation** - Select a workstation that will serve as the print controller for the printer
   - **Printer Type** - Epson RS232 Roll Printer
   - **Thermal printer** - Select this box
   - **COM Port** - COM1
   - **Baud Rate** - 9600 (default)
   - **Parity** - None
   - **Data Bits** - 8
   - **Stop Bits** - 2
   - **IDN ID** - 1
   - **Enable Logo Printing** - Select this box

4. Click **Save**.

Troubleshooting

Guest Checks with logos print slowly

It takes about five seconds for the logo to transfer from the client to the printer's buffer which makes it appear that the printer hangs before printing the guest check/customer receipt. Once the logo is in the buffer, all subsequent print jobs print at normal speed. Each time the user uploads a new logo or if the printer restarts, Epson IDN and IP Ethernet printers consider this a new request for the logo from the client. As long as there is enough buffer space, Epson Bluetooth printers do not delete the old logo. Simphony-supported Bluetooth printers support a 384 KB buffer. Therefore, Bluetooth printers do not send another request for the logo if the logo is still in the buffer.

Logo does not print on subsequent print jobs

Power off the printer for 10 seconds and power it back on to clear the printer's image buffer. The printer then requests the logo from the client.

The logo is STILL not printing!

If the logo still does not print after deleting it from the client and power cycling the printer, the bitmap could be invalid. Check to ensure you have complied with the rules governing the size of the logo as listed in Supported Images. EMC does not accept the import of images that do not meet the logo requirements.

Bluetooth auto-pairing takes several minutes before successfully printing guest checks with logos on Windows devices

It takes about four minutes (Windows start, Bluetooth pairing, Ops loading) before an mTablet E and DT365 can successfully print an Epson TM-P60 Bluetooth check with a logo. A check rung before that may not print successfully. It may fail completely or print only the characters for the header – it stops printing when it gets to the logo configured for the header.

Restarting the tablets after pairing allows you to start printing checks after four minutes. A check rung before four minutes could fail. Restarting the Service Host after pairing allows you to start printing checks after two minutes. A check rung before two minutes could fail. If there is no logo configured, then a check can be printed after two minutes.

Manual Bluetooth pairing takes 1-2 minutes before successfully printing guest checks with logos on Android devices

Restarting the MC40 Mobile MICROS handheld device after pairing allows you to start printing checks after two minutes.

Restarting the Service Host after pairing allows you to start printing checks after one minute.

See Also

- Logo Printing
- Simphony 2.7

Loyalty Module and Driver Configuration Guide

Simphony 2.x

General Information

About This Document

This document provides the steps necessary to implement the iCare driver in MICROS Simphony v2.5 MR1 and greater. The Simphony iCare configuration settings are dependent on the type of Loyalty module used. All aspects of the Loyalty configuration are maintained in the Enterprise Management Console (EMC) module within Simphony.

***Note**: The XProcessor Extension Application is still available for use with the Simphony iCare interface. If the site wishes to continue using XProcessor, the instructions in this document do not need to be completed.*

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Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version	Comments
Rev A	November	2012	2.5 MR1	Configuration introduced with Simphony v2.5 MR1.
Rev B	January	2013	2.5 MR1	Added XProcessor Extension Application migration procedures (Appendix A)' updated 'About This Document' and 'Before You Begin' sections. Added Professional Services Procedures for Distributing Third Party Driver Package (Appendix B).
Rev C	January	2014	2.6	Updated document for v2.6. The section 'Professional Services Procedures for Distributing Third Party Driver Package' (Appendix B) was removed.
Rev D	August	2014	2.7	Updated document for v2.7.

Contents

To help you navigate the document, information is organized in sections and displayed in the following sequence:

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Who Should be Reading this Document

This document is intended for the following audiences:

- MICROS Installers/Programmers/System Test Personnel
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Personnel
- MIS or IT Personnel

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of POS terminology and concepts
- Working knowledge of the Microsoft Windows interface
- Understanding of basic network concepts

Simphony Setup Procedures

Before You Begin

Before configuring the iCare driver, the following should be noted:

- Simphony v2.5 MR1 or greater must be installed at the Property.
- You must have access to the EMC module within Simphony.

XProcessor Extension Application

- If the site is using the XProcessor Extension Application for iCare, leave the XProcessor installed at the Enterprise level until all clients are upgraded to Simphony v2.5 MR1 or greater and using the new iCare interface.

  Both the iCare Loyalty/SVC interface and XProcessor Extension Application can be configured at the Enterprise level; however, each interface needs to be deployed only to the correct locations/clients. AFTER the appropriate clients have all been upgraded to Simphony v2.5 MR1 or greater, then complete the steps in Appendix A: XProcessor Extension Application Removal Procedures (at the back of this document).

- You will need to retrieve the data extension overrides for each property (i.e., URL, userid, user_password, timeout_seconds). Write down these settings as you will need this information to create the new integrated iCare interface.
- Write down the current functions that the site was using through XProcessor. You will need this information to create the buttons for the new iCare interface.

Third Party Driver Package Distribution

If a third party has developed a driver, use the driver configuration settings provided by the third party. Third party drivers may have unique fields.

EMC Configuration

Overview

This section provides instructions to configure the Loyalty module and Loyalty driver for use with Simphony v2.5 MR1 or higher:

All aspects of the Loyalty driver configuration are maintained in the EMC module within Simphony. You will need to set up Loyalty option bits, configure the Loyalty module, then the Loyalty driver, and lastly the screen/button designs for Front of House (FOH) usage.

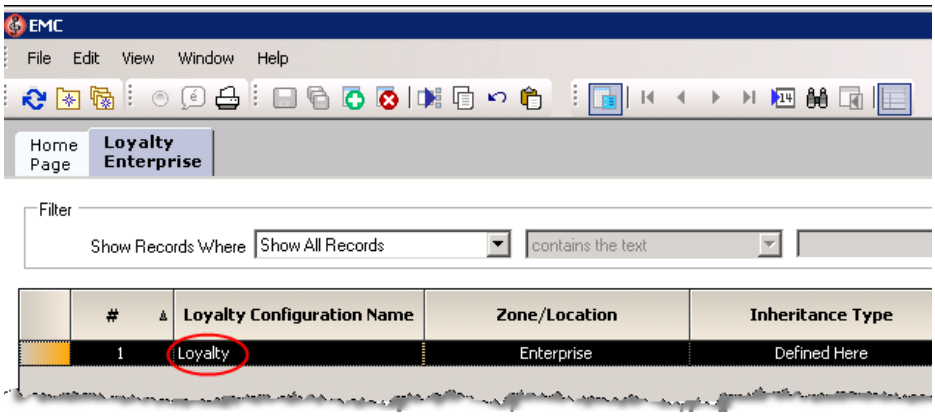
***Note**: The iCare driver is supported only on the Windows CE and Win32 operating systems.*

Loyalty Configuration

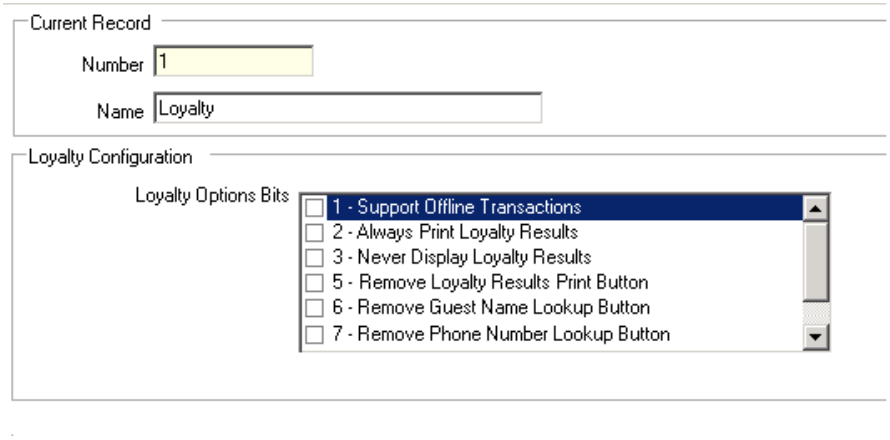
Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Configuration tab | Sales heading | Loyalty**.
3. If **Loyalty** already exists in the list of records, double-click its row to open. If Loyalty does not appear in the records list, add it using the green Insert Record button.



4. In the Loyalty Configuration area, enable (check) the desired Loyalty Option Bits. A description of each option bit is listed below:



- **Support Offline Transactions** - If enabled, offline transactions will be supported for Loyalty.
- **Always Print Loyalty Results** - If enabled, a chit will print automatically after each successful Loyalty operation.
- **Never Display Loyalty Results** - If enabled, Loyalty operations will not display the results (requires a touch to continue) before returning.
- **Remove Loyalty Results Print Button** - If enabled, the Loyalty results display will not show a Print button. (Use if the 'Always Print Loyalty Results' option above is enabled.)
- **Remove Guest Name Lookup Button** - If enabled, the Guest Name Lookup button will not display on the account number entry screen. (Disables Guest Name Lookup feature.)

- **Remove Phone Number Lookup Button** - If enabled, the Phone Number Lookup button will not display on the account number entry screen. (Disables Phone Number Lookup feature.)

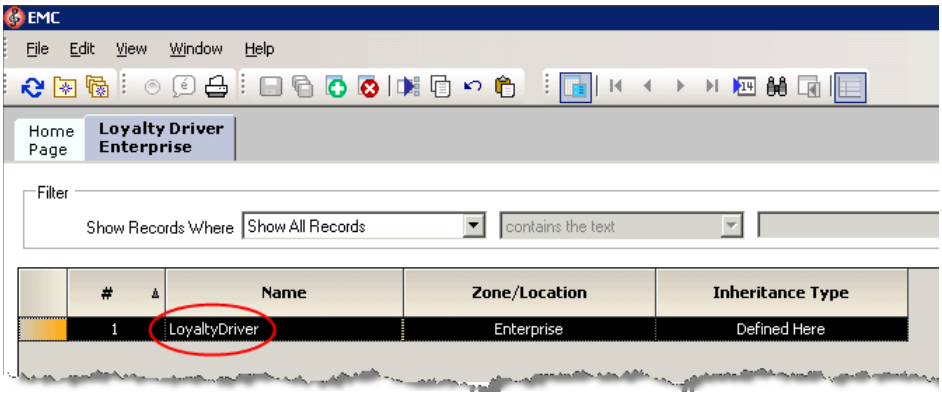
***Note**: The Guest Name and Phone Number Lookup buttons are only available with certain operations.*

5. Save and close the Loyalty Enterprise tab.

Loyalty Driver Setup

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Hardware/Interfaces heading | Loyalty Driver**.
3. If **LoyaltyDriver** already exists in the list of records, double-click its row to open. If LoyaltyDriver does not appear in the records list, add it using the green Insert Record button.



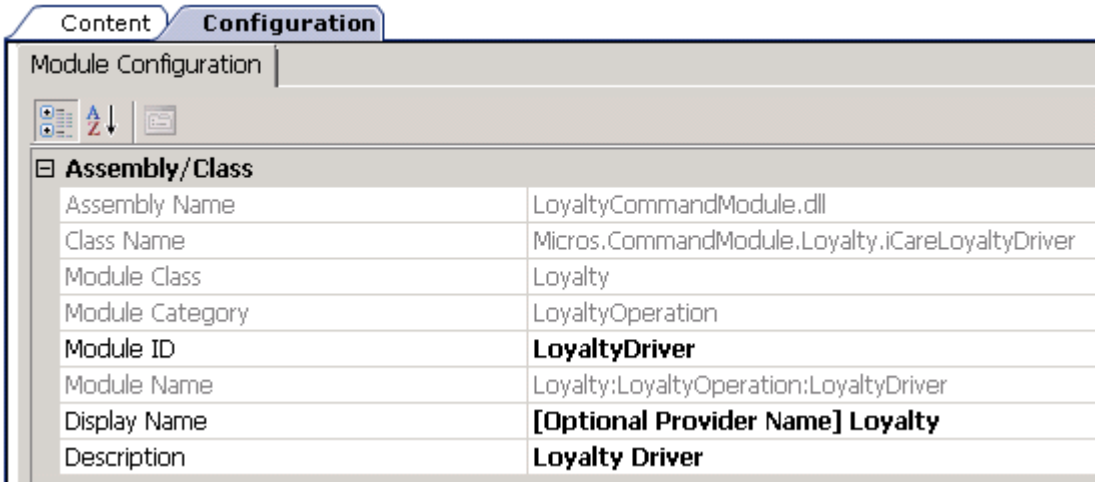
4. On the General tab, click the link called '**Import from a file**'.
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**LoyaltyCommandModule.dll**'.
6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:

   - **Module ID** - This value is used to identify the module.
   - **Display Name** - This value will be used to display the module name in Simphony FOH windows and dialogs.
   - **Description** - This value cannot be empty.



Loyalty Driver Properties

The Loyalty Driver Properties are specific to the driver being used. The screen shown on this page depicts the iCare Driver Properties.

9. In the LoyaltyDriver Properties section, enter information in the following fields:

   - **Certificate File** - If a unique certificate file has been implemented, specify the location of the certificate file on the local machine.

- **Communications Offline Retry Count** - The number of transactions that will be completed offline before attempting an online transaction. The default value is '**5**'.
- **Communications Timeout Seconds** - The default value is '**60**'. Setting this value to '**0**' (zero) will equal no timeout.
- **Ignore Server Certificate** - Set this value to '**True**' unless a unique certificate file has been implemented to secure communication between the driver and endpoint.
- **Log iCare Client Debug Data** - If the client is using iCare, specify whether the system will include debug information in the log. The default value is '**False**' (disabled).
- **Log iCare Client Message Data** - If the client is using iCare, specify whether the system will include client messages. The default value is '**False**' (disabled).
- **Login** - Leave this blank at the Enterprise level as it will be set at the Property level.
- **Password** - Leave this blank at the Enterprise level as it will be set at the Property level.
- **Web Address** - The path to iCare, including location, port number and service path. Use the following format: https://[iCareLocation]:[iCarePortNumber]/ws/services/StoredValueService.

***Note**: If using a third party payment provider application (rather than iCare), enter the path to the third party payment provider application. This may be a Web address or local path.*

iCare Driver Properties	
Certificate File	
Communications Offline Retry Count	2
Communications Timeout Seconds	30
Ignore Server Certificate	True
Log iCare Client Debug Data	True
Log iCare Client Message Data	True
Login	
Password	
Web Address	https://[iCareLocation]:[iCarePortNumber]/ws/services/StoredV

***Note**: The Offline Properties section cannot be edited. The values shown in this section are populated from iCare.*

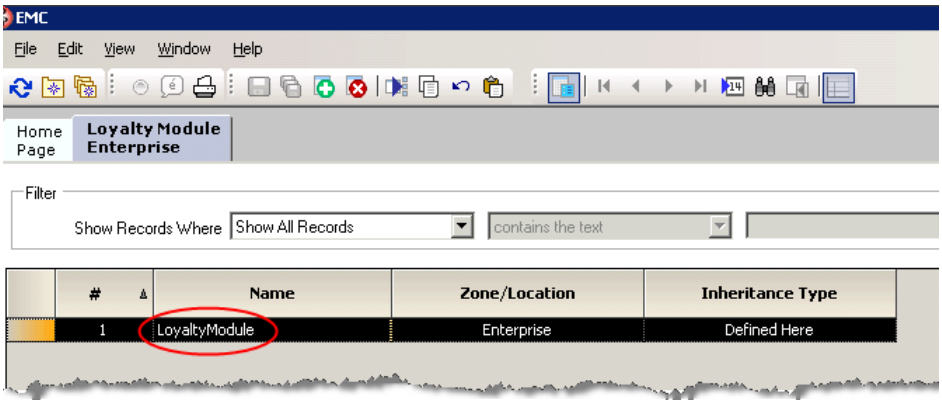
10. Save your changes and close the Loyalty Driver Enterprise tab.

Loyalty Module Setup

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Hardware/Interfaces heading | Loyalty Module**.

3. If **LoyaltyModule** already exists in the list of records, double-click its row to open. If LoyaltyModule does not appear in the records list, add it using the green Insert Record button.



4. On the General tab, click the link called '**Import from a file**'.

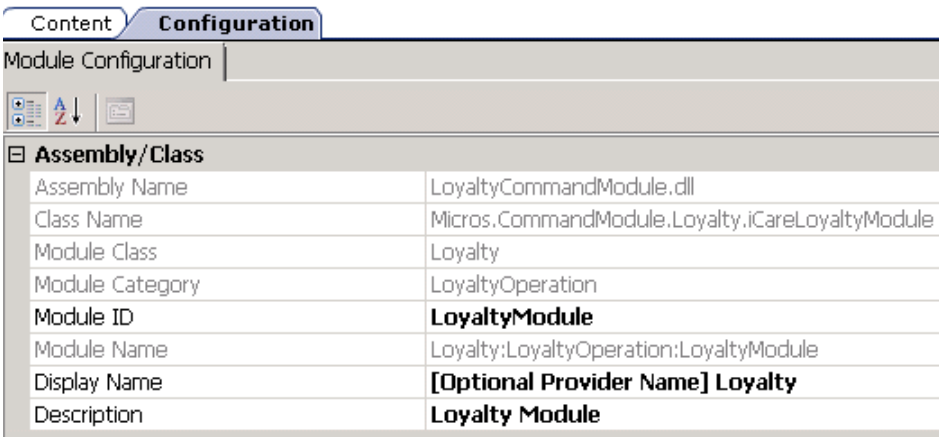
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**LoyaltyCommandModule.dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

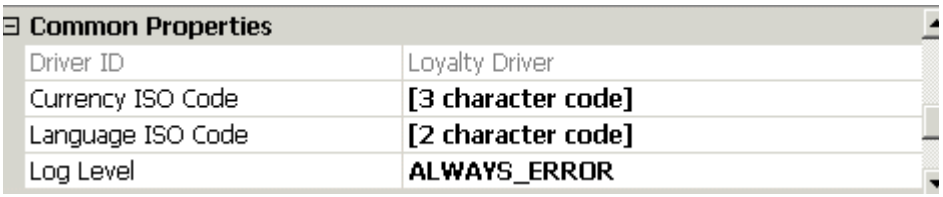
8. In the Assembly/Class section, enter information in the following fields:



- **Module ID -** This value is used to identify the module.
- **Display Name** - This value will be used to display the module name in Simphony FOH windows and dialogs.
- **Description** - This value cannot be empty.

Common Properties

9. In the Common Properties section, enter information in the following fields:

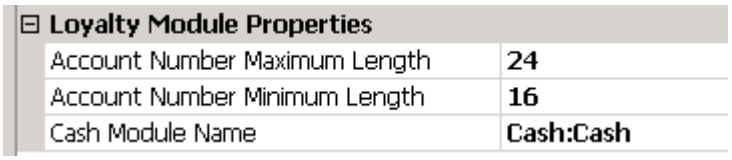


- **Currency ISO Code -** The code which represents the currency used (3 alpha characters). Please refer to http://www.currency-iso.org/dl_iso_table_a1.xls for a list of current Currency ISO 4217 codes (e.g., EUR= Euro, USD=US Dollar).
- **Language ISO Code -** The code which represents the language used (2 alpha characters). Please refer to http://www.loc.gov/standards/iso639-2/php/code_list.php for a list of current Language ISO 639-1 codes (e.g., EN=English, ES=Spanish).

***Note**: If the currency or language is different at the property, these values will need to be overridden at the Property level.*

Loyalty Module Properties

10. In the Loyalty Module Properties section, enter information in the following fields:



- **Account Number Maximum Length -** The maximum length of a Loyalty account number (up to 24 digits).
- **Account Number Minimum Length** - The minimum length of a Loyalty account number (down to 7 digits).
- **Cash Module Name** - The name of the cash module to use for redemptions. (The recommended value and MICROS default is Cash:Cash.)

11. Save your changes and close the Loyalty Module Enterprise tab.

Property Level Configuration

Driver Only Override

1. In the Locations hierarchy, highlight the Property module.
2. Navigate to **Setup tab | Hardware/Interfaces heading | Loyalty Driver**.
3. Double-click the **LoyaltyDriver** record to open it.
4. Click the '**Override This Record**' link.
5. Click the '**Yes**' button.
6. Click the '**Configuration**' tab.
7. In the LoyaltyDriver Properties section, enter information in the following fields:
   - **Login** - Login for the property ID, OR the login for the provider.
   - **Password** - Password for the property OR the provider.

iCare Driver Properties	
Communications Offline Retry Count	**5**
Communications Timeout Seconds	**60**
Log iCare Client Debug Data	**False**
Log iCare Client Message Data	**False**
Login	**[Login credentials]**
Password	**[Password]**
Web Address	**[https://[iCarelocation]:[iCareportnumber]/ws/services/StoredValueService]**

***Note**: The Offline Properties section cannot be edited. The values shown in this section are populated from iCare.*

8. Save your changes and close the Loyalty Driver Property tab.

Screen Design Configuration

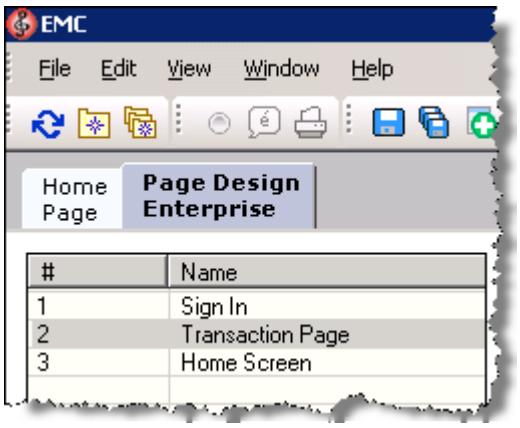
The instructions below explain how to set up the FOH screen and buttons for use with the Loyalty functions.

1. Open the EMC application in Simphony and log in.

2. Highlight the Enterprise module.

3. Navigate to **Configuration tab | User Interface heading | Page Design**.

4. Double-click the row of the desired page/screen to open it.

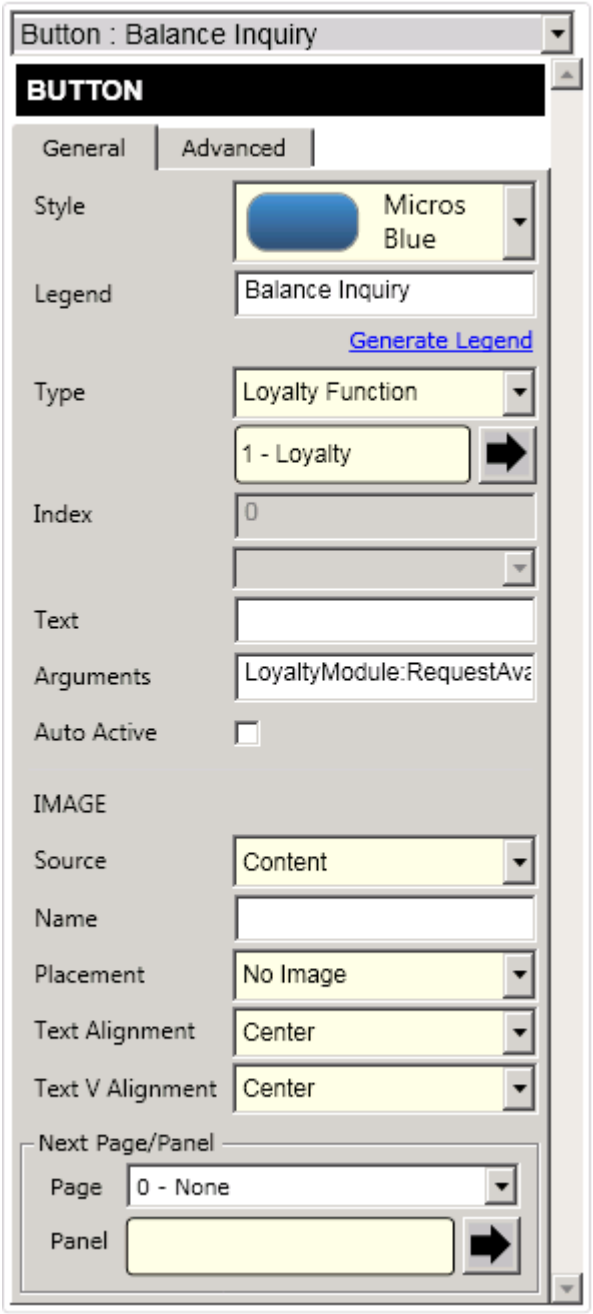


__Note__: The screenshots shown depict a Transaction Page as the example. Your system will likely have a different page or screen name for the buttons.

5. On the Edit tab, navigate to where the Loyalty functions are to be defined. This is typically either the Payment or Function area.

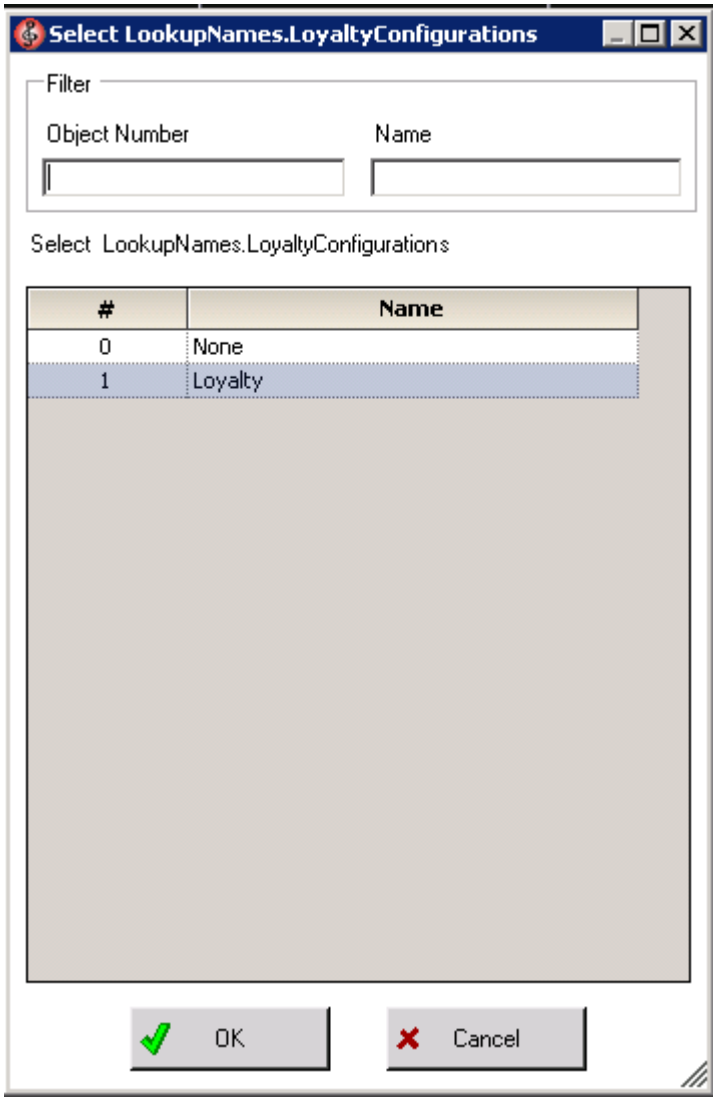
6. Click the Insert (+) button.

7. In the General tab select '**Loyalty Function**' from the Type drop-down.

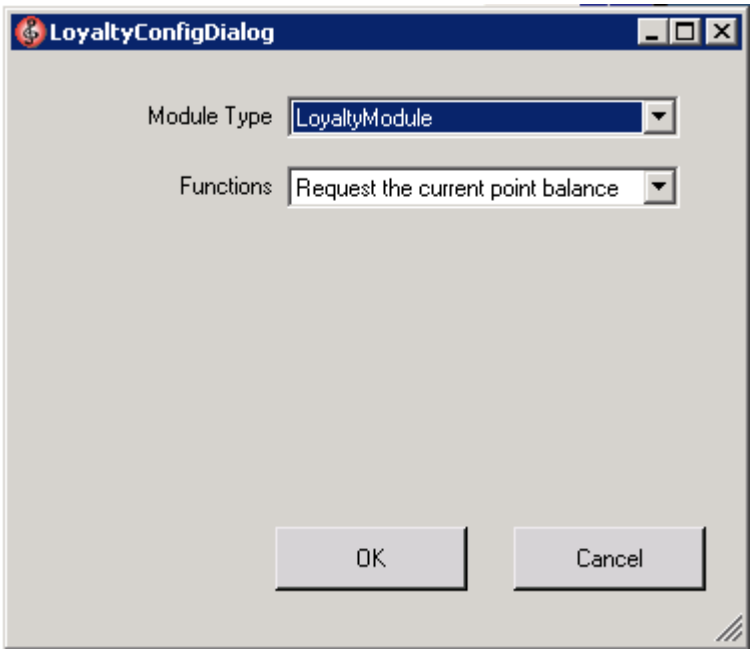


8. Directly under the Loyalty Function drop-down, click the black arrow.

9. On the *Select LookupNames.LoyaltyConfigurations* window, select '**Loyalty**', and then click the '**OK**' button.



10. On the *LoyaltyConfigDialog* window, select '**LoyaltyModule**' for the Module Type and your desired function in the Functions drop-down list. Click the '**OK**' button.



11. Position and size the gray square button wherever you want to place it on the FOH screen. Use the Style drop-down to change the color.

12. In the Legend field, type the name of the button.

13. Repeat steps 5-13 for any additional supported Loyalty functions. The following Loyalty functions and descriptions are available.

***Note**: Functions marked with an * are only available with iCare; they are not currently available with third party payment providers.*

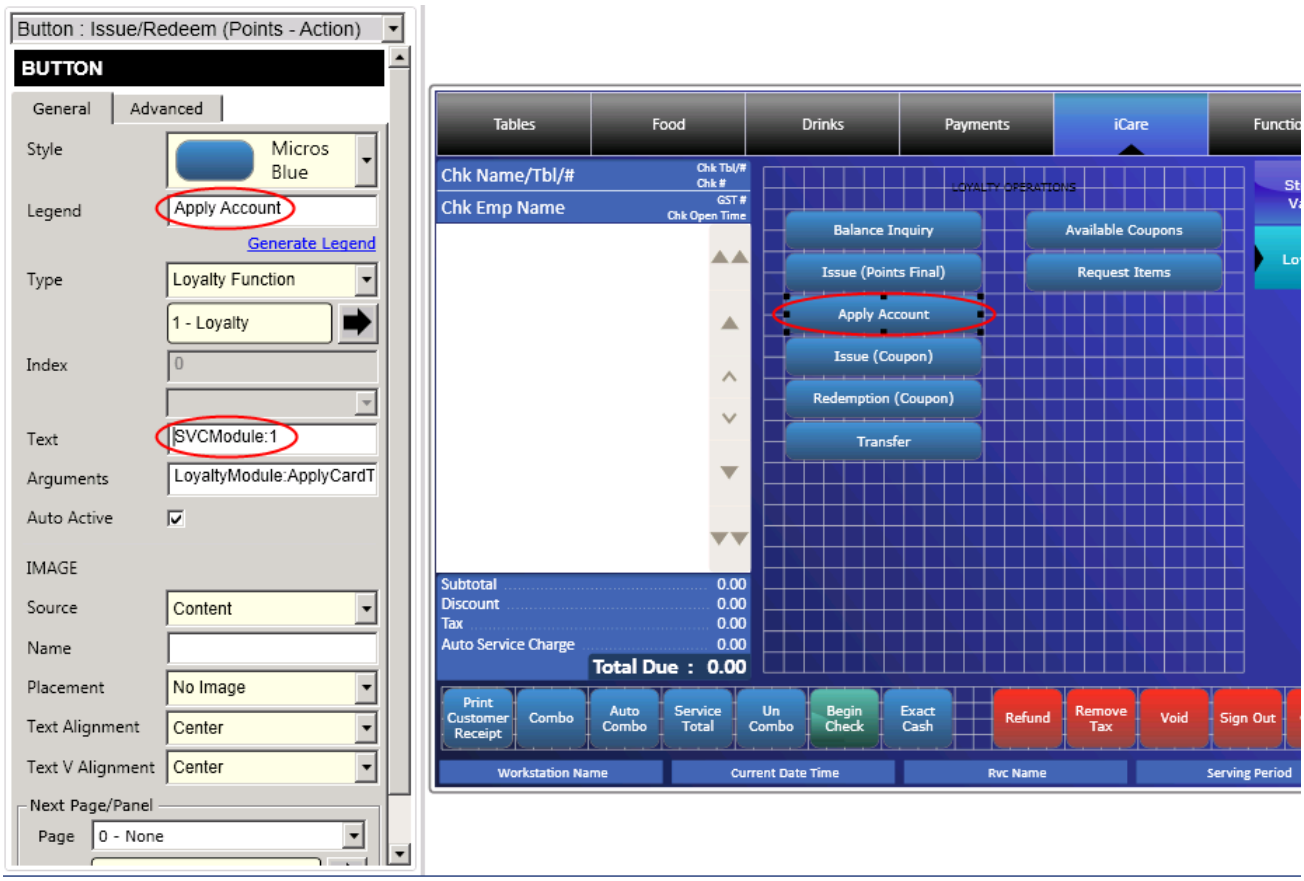
The Lookup Patron operation is not functional on its own; please do not use this operation. Enable Guest Lookup methods through the Loyalty configuration on page 7.

- **Balance Inquiry** - Request a points balance for a Loyalty Account.

- ***Unique Items Inquiry** - Request a list of unique menu items that have been ordered on a program associated with a Loyalty Account.
- **Issue Points** - Issue points to a Loyalty Account.
- **Coupon Inquiry** - Request a list of coupons that are available for a Loyalty Account.
- **Redeem Coupon** - Accept/redeem a coupon to apply towards the balance of a Guest Check.
- **Issue Coupon** - Issue an ad hoc coupon from iCare to a guest Loyalty Account.
- **Transfer Loyalty Account** - Transfer the points balance and customer personal information associated with one Loyalty Account number to another Loyalty Account.
- ***Apply Card to Check Function** - The Apply Card to Check function sends an Apply request to iCare for the account number. Based upon iCare configuration, a number of actions may be allowed and returned to the user for selection:
  - Apply Coupon
  - Redeem Points
  - Redeem SVC
  - Apply Coupon/Redeem SVC
  - Issue Points

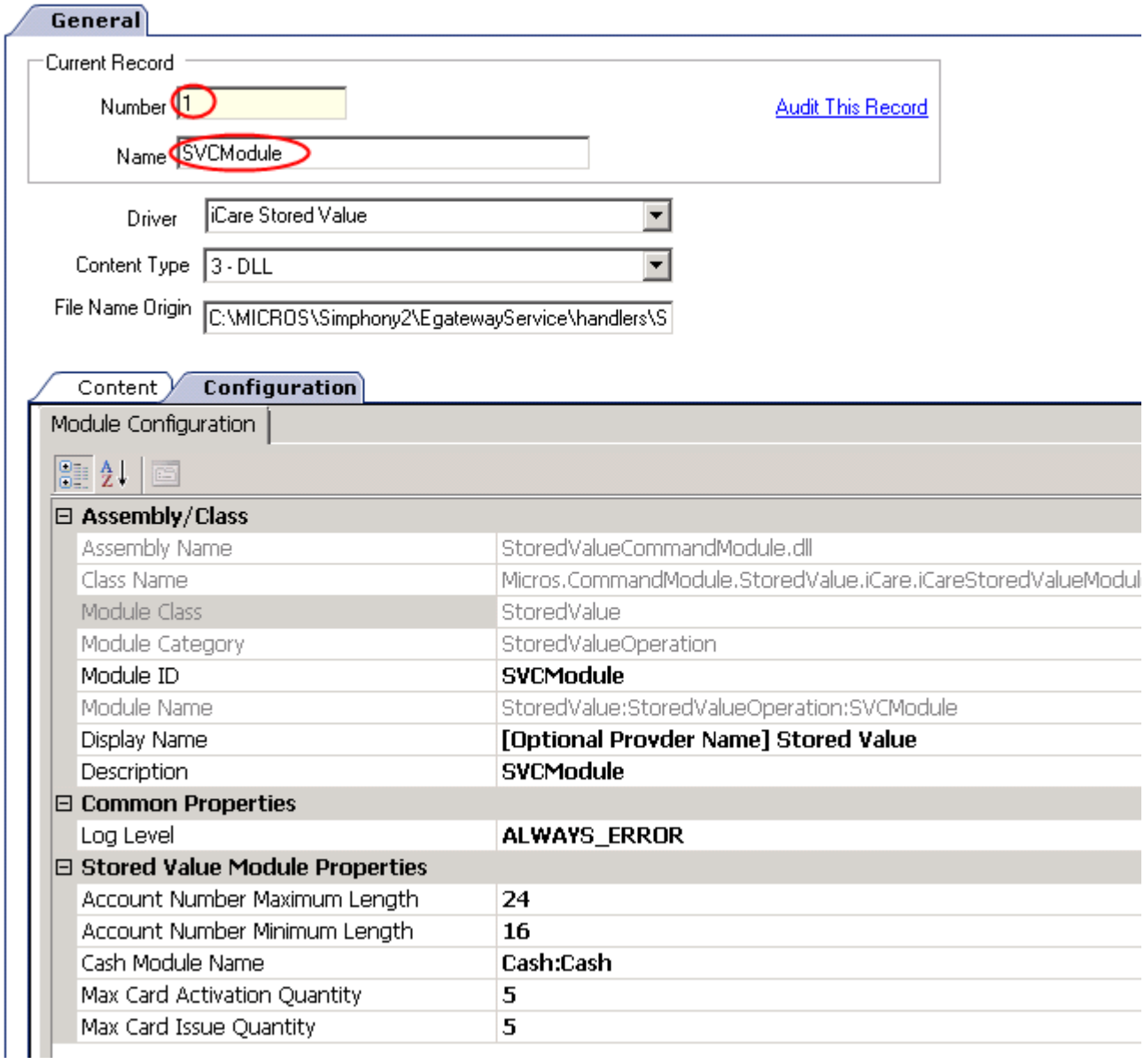
  The Apply Card to Check function requires a special configuration to share data between the Loyalty and Stored Value modules. Follow the steps below to set up the Apply Card to Check button.

14. On the General tab in the Text field, enter the SVCModule Name and Record Number. Use the format “SVCModuleName:RecordNumber” to process any SVC actions associated with this function.



***Note**: A site can load more than one type of Loyalty module, although MICROS does NOT recommend this. If the site has more than one Loyalty module, the Arguments field for the second module will need to be manually typed in to match the module name of the second driver.*

The Record Number and Module Name can be found by highlighting the Enterprise module and navigating to the **Setup** tab **| Hardware/ Interfaces heading | Stored Value Module**. The example below shows that the Record Number is 1 and the Module Name is SVCModule. This information should be entered for step 14 above.



15. Save your changes and close the Page Design Enterprise tab.

Appendix A

XProcessor Extension Application Migration Procedures

Beginning with Simphony v2.5 MR1, sites have the option of installing the new Loyalty driver for iCare (in place of the XProcessor Extension Application).

***Note**: Ensure that the appropriate clients have been upgraded to Simphony v2.5 MR1 or greater prior to completing the instructions in this appendix.*

Remove CAL Directories and EMC CAL Package

1. Navigate to the CAL server's Win32 or WinCE sub-directory for iCare:
   - CAL\Win32\ICareProcessor2.0 directory
   - CAL\WinCE\ICareProcessor2.0 directory
2. Delete the 'ICareProcessor2.0' directory.
3. In EMC, navigate to **Setup tab | Hardware/Interfaces heading | CAL Packages**.
4. Delete the CAL Client package that was used to deploy the ICareProcessor2.0 directory to the workstation(s).

Remove XProcessor Extension Application

5. Delete the following DLL files from the disk:

   - Micros.XProcessor.dll
   - Micros.XProcessor.SVC.dll
   - Micros.XProcessor.SVC.ICare.dll

6. In EMC, navigate to **Setup tab | Custom Content heading | Extension Application**.

7. Delete the Extension Application for XProcessor.

Remove XProcessor Payment Driver from EMC

8. In EMC, navigate to **Setup tab | Hardware/Interfaces heading | Payments**.

9. Delete the XProcessor Payment driver.

Remove XProcessor Closed Check Tender Media

10. In EMC, navigate to **Configuration tab | Sales heading | Tender/Media**.

11. Delete ‘XProcessor Close Check’.

Remove XProcessor Configuration Content and Data Extensions

12. Delete the iCareSvcProcessor.icare.xml file.

13. In EMC, navigate to **Configuration tab | Reporting and Data heading | Data Extensions** and delete the data extensions for each property.

Remove Buttons from Page Designer

14. Navigate to **Configuration tab | User Interface heading | Page Design**.

15. Double-click the record with the screen containing iCare buttons to open it.

16. Delete all iCare buttons.

Reuse Additional Items for Posting

Depending on the site's iCare configuration, additional menu items, discounts, service charges, or tenders may have been used. If these items are in use, leave these additional items and do not delete them.

Remove Install Files for Check Reprocessor

If the site was using the Check Reprocessor service, remove the installed check reprocessor files from the enterprise service host as the new iCare interface has its own plug-ins.

17. Navigate to the Handlers directory where the Check Reprocessor was run.

18. Open the ChkReprocSvcHost.DLL.config file.

19. Delete the following tag:

```
<pluginAssembly displayname="XProcessor Reprocessor"
fullname="Micros.XProcessor.SVC.dll,
Version=0.0.0.0, Culture=neutral,
PublicKeyToken=null" />
```

20. Leave the tags `<pluginAssemblies>` and `</pluginAssemblies>`.

21. In the Handlers directory, delete the following DLL files:

- Micros.XProcessor.Payment.dll
- Micros.Ops.Extensibility.dll
- Micros.XProcessor.dll
- Micros.XProcessor.SVC.dll
- Micros.XProcessor.SVC.iCare.dll

Major Group

A **Major Group** is a basic category of a Menu Item, such as "Food" or "Liquor". Every menu item belongs to a Major Group.

This article belongs to the MICROS **Important concepts** category.

A **corresponding article** for this topic exists in the Data Access namespace.

This article relates to programming of an EMC module.

This article discusses the usage of one or more **Function Keys**. (645)

This article discusses general MICROS knowledge and/or **terminology**.

Contents

- 1 Standard Configuration
- 2 EMC Configuration
- 3 Function Key
- 4 See also

Standard Configuration

Typical Major Groups include:

- Food
- Liquor
- Beer
- Wine

These are typical examples of Major Groups, however configuration may vary drastically depending on the database and reporting needs. In some databases, Major Groups may be programmed to represent leased outlets so that an accountant can immediately see sales figures for that tenant.

EMC Configuration

Major Groups are configured from the EMC's property scope. In this module, there is not a Form View. The only configurable fields are:

- Object Number
- Name
- Report Group

Function Key

The **[MajGrp Menu Item]** function key (645) can be used to display all Menu Items in a Major Group. When this key is used, the workstation will prompt for the Major Group. After a selection is made, the workstation will list all the menu items that are available in that Major Group (in the form of an NLU window). Note: only items that are available on the current Main/Sub Levels will be displayed.

Manual Discount

*This article is about discounts programmed in EMC as **Manual (Manually entered and applied)**. See Automatic Discounts for information about automatic discounts. See Automatic Coupon Discounts for information about coupon discounts.*

Contents

- 1 Understanding discounts
- 2 Understanding subtotal discounts
  - 2.1 Which items are discounted?
    - 2.1.1 Itemizers vs. Menu Item Groups
  - 2.2 Prorating discounts
  - 2.3 Preventing other discounts
- 3 Understanding item discounts
  - 3.1 Preventing other discounts
- 4 Configuration best practices
  - 4.1 Programming discounts as coupons
    - 4.1.1 Configuring a coupon discount
    - 4.1.2 Applying a coupon discount
  - 4.2 Programming discounts as employee meals
    - 4.2.1 Configuring an employee meal
    - 4.2.2 Applying an employee meal discount
    - 4.2.3 Example of common employee meal configuration
- 5 Configuring manual discount options
- 6 Configuring manual discount effectivity
- 7 Configuring manual discount effectivity groups
- 8 Configuring manual discount for revenue centers
  - 8.1 Simphony v1: Revenue Center Groups
  - 8.2 Simphony v2: Revenue Center Types
- 9 Enabling/disabling a discount record
- 10 Configuring optional settings
  - 10.1 Condiment Discountability
  - 10.2 Property Parameters
  - 10.3 Revenue Center Parameters
    - 10.3.1 Simphony v1
      - 10.3.1.1 Posting Options
      - 10.3.1.2 Control Options
    - 10.3.2 Simphony v2
      - 10.3.2.1 Posting Options
      - 10.3.2.2 Control Options
- 11 Configuring discount privileges
  - 11.1 Voids/Returns
  - 11.2 Transactions
- 12 See also

This article contains information for **Simphony v1** and **Simphony v2**.

This article belongs to the MICROS **Important concepts** category.

This article contains a **best practices** section.

A **corresponding article** for this topic exists in the Data Access namespace.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses behavior that is important for **Reporting**.

Understanding discounts

A discount reduces the price of an item or items on a check. Discounts are generally used for promotional purposes (a coupon for a free dessert) or customer satisfaction (a manager may discount part of a meal to compensate for a poor customer experience). You can program discounts as Subtotal Discounts or Item Discounts. An Item Discount is used to discount a single item, whereas Subtotal Discounts apply to one or more items on the check based on the configuration of the discount.

Four general configurations apply to all discounts. You can program a discount in one of the following ways.

- **Fixed Amount**: Fixed Amount discounts take a fixed amount off the item or check. For instance, a $10.00 fixed amount discount takes $10 off the check or item.
- **Open Amount**: Open Amount discounts reduce the item or check by an amount determined at the time the discount is entered. When you enter an open amount discount, you are prompted for the amount of the discount.
- **Fixed Percent**: Fixed Percent discounts take a fixed percent off the item or check. For instance, a 10% fixed percent discount takes $1.00 off a $10.00 check, or $3.50 off a $35.00 check. (This example assumes all items on the check can be discounted.)
- **Open Percentage**: Open Percentage discounts reduce the item or check by a percent determined at the time the discount is entered. When you enter an open percent discount, you are prompted for the percentage to be discounted.

Related Links: Discount

Understanding subtotal discounts

All discounts are subtotal discounts by default, which means that the discount applies to all items on a check that belong to a menu item group or itemizer group affected by the discount. A discount is a subtotal discount when you unselect the **[3 - This is an Item Discount]** option in *EMC > Enterprise / Property / Zone > Configuration > Discounts > General*.

You can ring a subtotal discount any time during the transaction, and the subtotal discount applies to all applicable items at the time it is rung. If you ring menu items after applying the discount, the new items are not discounted.

Unlike some previous products, subtotal discounts in Simphony can be thought of as *item discounts that apply to multiple items*. As discussed in the Prorating discounts section of this article, the amount of a subtotal discount is allocated to all items to which the discount applies — a $3.00 discount that applies to two items discounts each item by $1.50. (In previous products, a subtotal discount may have been calculated on the total of the check, but not allocated to the items to which it discounted.) This concept is important to consider when programming subtotal discounts, especially when configuring the exclusivity rules that should apply.

Which items are discounted?

Discounts apply to items or they do not. This simple statement takes on more complex rules in the course of a transaction, including such considerations as *Is another discount already applied to the item?* and *Can this discount be applied at the same time as other discounts?*. The

You can program the system so that some discounts use the itemizer method and others use the menu item group method. MICROS

workstation performs calculations as you apply discounts to the guest check based on the configuration of the discounts. This section discusses the act of a single discount being applied to an item(s) on a check. See Discount Exclusivity for information about the interaction of two or more discounts.

> highly discourages this type of programming. The menu item group method is the preferred programming method for discounts.

Two methods exist to determine whether an item gets discounted. The legacy method of determining discounts is called the discount Itemizers method, while the preferred method of discounting is called the Menu Item Groups method. Both methods are discussed here, but MICROS recommends using the Menu Item Group method for greater flexibility and easier understanding for programmers.

Itemizers vs. Menu Item Groups

The itemizer method is used when databases are initially upgraded to Simphony. However, menu item groups are easier to program and understand than discount itemizers. The configuration and operations of the two methods are shown in the following chart.

Method	Configuration	Workstation Operations
Discount Itemizers	▪ Each menu item definition is linked to a menu item class ▪ Each menu item class is linked to a discount itemizer ▪ Each discount is linked to one or more discount itemizers	When you apply a discount to a check, the workstation performs the following operations: 1. Determines the discount itemizer(s) associated with the discount 2. Finds all menu items associated with a menu item class that is associated with those itemizers. 3. Applies the discount to the appropriate items. Discounts are prorated — if the discount is $15.00 and there are three items being discounted, each item is discounted by $5.00.
Menu Item Groups	▪ In the Menu Item Groups module, a Menu Item Master record (or its Major/Family Group) is assigned to a Menu Item Group. ▪ A discount is linked to a Menu Item Group	When you apply a discount to a check, the workstation performs the following operations: 1. Determines the menu item group associated with the discount 2. Finds all the menu items associated with the discount

		3. Applies the discount to the appropriate items

Prorating discounts

With either the itemizer programming method or the menu item group programming method, discounts that apply to menu items are always prorated (or "allocated") to the discounted items. For example, if you ring three items on a check and apply a $15 discount, each item receives $5 of the discount (assuming the discount applies to all three items). If more discounts can be applied to the check (based on the Discount Exclusivity configuration), the three items that were discounted are discounted from the original amount minus the $5.00. For instance, if one of the items was originally $27, the following occurs:

The example shown in this section discusses the same item being discounted more than once. This scenario is explained for informational purposes only. While it is possible to configure the system in this manner, a system is more likely to be programmed so that menu items can be discounted only once.

- The example discount was applied for $5.00; only $22 is available to be discounted again.
- A 50% discount applies to the item — the item now has $11 available to be discounted.

Preventing other discounts

When you apply a subtotal discount to items on a check, a site may prevent additional discounts from applying to those items. Configure this by selecting option **[23 - Simple Transaction Exclusivity]**. Alternate configurations are possible that allow some discounts to apply while others cannot. These scenarios are discussed in the Discount Exclusivity article. In addition, the Example Transactions section of the exclusivity article includes examples specific to subtotal discounts.

Related Links: Discount Exclusivity

Understanding item discounts

A discount can be programmed as an item discount, which means that the discount applies to only one item. A discount is an item discount when you select option **[3 - This is an Item Discount]**. Item discounts apply to any menu item that is in a menu item class with option **[7 - Item Discounts May Be Applied to these Menu Items]** selected. (Discount Itemizers and menu item groups are not relevant to item discounts).

Currently, you must ring an item discount immediately after the menu item to be discounted. For instance, if a restaurant has a Tuesday 50% Wing Night, a 50% discount is created as an item discount. You *must* ring the discount immediately after the item (and in the same service round). This being considered, if the wings required a forced modifier such as wing sauce, you must ring the item discount *before* the forced modifier. This means that the Item Discount key must be available on the touchscreen or keyboard.

Eventually, it may be possible to apply an item at a later point in the transaction — including applying the discount in a different service round — by using a "touch-discount", similar to a Touch-Void. This functionality has not yet been implemented.

Preventing other discounts

When you apply an item discount to an item, a site may prevent additional discounts from applying to that item. To configure this, configure the item discount by selecting option **[9 - Simple Item Exclusivity]**. Alternate configurations are possible that allow some discounts to apply while others cannot; these scenarios are discussed in the Discount Exclusivity article. In addition, the Example Transactions section of the Discount Exclusivity article includes examples specific to item discounts.

Related Links: Discount Exclusivity

Configuration best practices

Discounts configured as coupons and employee meals require specific programming to gain the desired functionality. The following examples give best practices scenarios for programming these types of discounts.

Programming discounts as coupons

It would seem that programming for a coupon is simple — just program a fixed-amount discount for the amount of the coupon. For example, if the coupon is $5.00, program it for $5.00. However, this programming method is incorrect for programming coupons.

Consider a check with a total amount of $3.00. When an operator attempts to use the $5.00 fixed-amount discount, the workstation shows the error: `Discount amount too large.` How can a discount be smart enough to discount $5.00 when $5.00 or more is discountable, but to discount all of a $3.00 check? The answer is to program the discount as a *percentage* discount using a specific combination of discount options as follows.

Configuring a coupon discount

Configure the following options and fields:

- Select option **[1 - ON = Open; OFF = Preset]**. When selected, the discount is an open discount.
- Select option **[2 - ON = Amount; OFF = Percentage]**. When selected, the discount is an amount discount.
- Enter $5.00 in the **Amount** field. (This relates to the next option.)
- Select option **[7 - Limit Discount to Value in Amount Field]**. When selected, the discount can only be applied for amounts up to the value in the Amount field, which in this example is $5.00. For a full description of this option, see the Options listing later in this article.
- Select option **[8 - If No Amount is Entered, Use the Full Discountable Amount]**. When selected, the discount is applied to all sales on the check, up to the value in the "Amount" field. For a full description of this option, see the Options listing later in this article.

Applying a coupon discount

This first scenario assumes a $10 check and a $5 coupon configured as previously described. After you enter the coupon,

the workstation's logic for applying the discount is as follows:

1. No amount was entered, so use the full discountable amount (option **[8]**).
2. The full discountable amount is $5.00 (option **[7]**, with value in the **Amount** field).
3. Therefore, $5.00 is discounted.

In this example, the check is $3, and the coupon is $5. The logic in this scenario is:

1. No amount was entered, so use the full discountable amount (option **[8]**).
2. The full discountable amount is $3.00 (the amount of items on the check).
3. Therefore, $3.00 is discounted.

Programming discounts as employee meals

A discount is considered an employee meal discount when you select option **[4 - Employee Meal]**. When selected, the workstation prompts the operator to enter an employee number or employee ID number of the employee receiving the discount.

Configuring an employee meal

Select the following options:

- **[4 - Employee Meal]**: Select this option to mark this discount as an employee meal, and for the other options to become active.
- **[18 - Employee Meal Discount Applies to Scheduled Employees Only]** (optional): See Configuring manual discount options later in this article for a full description.
- **[22 - Employee Meal Discount Applies to Employees On Break Only]** (optional): See Configuring manual discount options later in this article for a full description.

Applying an employee meal discount

When you enter an employee meal discount, the workstation prompts for the Employee ID or Employee Number of the employee who is receiving the discount. The Revenue Center Parameters option **[ON = Use Employee Number with Employee Meal; OFF = Use ID #]** controls the prompting behavior. Unselecting this option is more secure, requiring the employee ID or employee ID card swipe.

Example of common employee meal configuration

Restaurants often provide employee meals with rules such as *50% discount off all food, but no more than $15.00 off*. (This prevents employees from ordering the most expensive items on the menu.) Select the following options for this type of discount:

- **[1 - ON = Open; OFF = Preset]**
- **[2 - ON = Amount; OFF = Percentage]**
- Enter $15 in the **Amount** field.

- Enter 50% in the **Percent** field.
- **[7 - Limit Discount to Value in Amount Field]**

In this example, when you enter the discount on a check, the amount never exceeds $15. If the meal is $30, $15 will be discounted. If the meal is $50, only $15 will be discounted. When you set this type of configuration, the workstation shows **50% Up To 20.00** in the check detail area.

Configuring manual discount options

Click here to see the full list of Discount options.

Configuring manual discount effectivity

In both Simphony v1 and v2, you can configure all discounts — automatic, coupon or manual — to be effective at different times of day, different days of the week, or for a specific date range. Set this configuration in the Discounts module > Effectivity tab.

Configuring manual discount effectivity groups

Simphony v2 contains an additional effectivity control called an Effectivity Group, which is configured in the Discounts module > Effectivity Groups tab. You can assign discounts, menu item prices, and other configuration elements to an effectivity group. The effectivity group configuration allows a system administrator to configure and package promotions so that the menu items and their discounts are only available for a fixed period of time.

If you assign a discount to an effectivity group, that group must also be active (in addition to all of the other conditions) to apply that discount.

Configuring manual discount for revenue centers

Both Simphony v1 and v2 can lock down a discount to only be used in a specific type of revenue center. However, the manner in which the applications perform this task differs slightly.

When an operator attempts to ring a discount that is not configured for the current revenue center — as determined by the Revenue Center Type or Group setting, the workstation shows the error: **`This discount is not allowed in this Revenue Center`**. In addition, discount SLUs only display discounts that are valid for the current revenue center using this information.

Simphony v1: Revenue Center Groups

You can apply a discount to all revenue center groups or a single group. The default setting allows a discount to function

in all revenue centers. The Revenue Center Group setting is located in the Discounts module > General tab.

Related Links: Revenue Center Group

Simphony v2: Revenue Center Types

You can apply a discount to all, some, or one revenue center type. If a discount does not apply to any revenue center type, it will not function anywhere in the system. You can configure the revenue center types in the Discounts module > RVC Type tab. Select the revenue center(s) where the discount will be available.

Enabling/disabling a discount record

You can disable a discount record by unselecting the **Enabled** field for the discount record in the Discounts module > General tab.

Configuring optional settings

If appropriate, configure additional options relating to discounts.

Condiment Discountability

This functionality exists only in Simphony v2 and is configured in the Discounts module > General tab. This field allows you to configure the way in which discounts affect condiments.

Option	Description
0 - Use MI Class Option	Discount applies to parent items, and only to condiments if you select the Menu Item Class option **[55 - Discounts Apply to Priced Condiments]**.
1 - Parent Items Only	Discount applies only to parent items and does not extend down to any priced condiments.
2 - Condiment Items Only	Discount applies to condiment items and does not apply to the price of the parent item.
3 - Parent and Highlighted Condiment Items	Discount applies to both the parent and highlighted/selected condiment item(s). It is effectively the same as choosing **[0 - Use MI Class Option]** and selecting the menu item class option **[55 - Discounts Apply to Priced Condiments]**. You must also select Discount option **[30-Selected menu item to include parent menu item in discount]** along with this Condiment Discountability option **[3]**.
4 - Parent and All	Discount applies to the parent and all condiment items. You must also select Discount option **[30-Selected menu item to include parent menu item in discount]** along with this Condiment

Condiment Items	Discountability option **[4]**.

Property Parameters

1. Navigate to *EMC > Property > Setup > Property Parameters > Options*.
2. Select option **[2 - Post Food Cost Totals Net of Item Discounts]** to post food cost totals net of item discounts (after item discounts are calculated). Unselect this option to post gross food cost totals (before item discounts are calculated).

Revenue Center Parameters

Simphony v1

The following Revenue Center Parameters options relate to discount behavior.

Posting Options

Option	Description
2 - Round Discount and Service Charge % Entries	Select this option to cause percentage discount amounts and percentage service charge amounts to be rounded according to the settings of the options [Round Discount and Service Charge % to 0, 10] and [Round Discount and Service Charge % Based on 10s Digit]. Unselect this option to cause the amounts to be rounded to the nearest least significant digit (for example, the penny).
3 - Round Discount and Service Charge % to 0, 10	This option is active only if you select the option [Round Discount and Service Charge % Entries]. Select this option to round percentage amounts to the nearest 0 or 10 increment. Unselect this option to round percentage amounts to the nearest 0, 5, or 10 increment.
4 - Round Discount and Service Charge % Based on 10s Digit	This option is active only if you select the option [Round Discount and Service Charge % Entries], and is affected by the setting of the option [Round Discount and Service Charge % to 0, 10]. Select this option to round percentage amounts based on the second least significant digit (for example, the 10s). Unselect this option to round percentage amounts based on the least significant digit (for example, the units digit).

Control Options

- 4 - Allow Void of Discount in Current Service Round Only: Select this option to allow privileged operators to void discounts only in the current service round. Unselect this option to allow privileged operators to void discounts that were posted in the current round or in any prior service round. This option must be unselected to allow operators to

void discounts on re-opened checks.

Simphony v2

The following Revenue Center Parameters options relate to discount behavior.

Posting Options

The main difference between Simphony v1 and v2 in this area is due to the fact that Simphony v2 introduced the ability to round service charges separately from discounts. When this functionality was introduced, the service charge portion of these options was moved to options 13, 14, and 15. The change in functionality does not cause a difference in functionality or configuration between Simphony v1 and v2 with regard to discounts.

Option	Description
2 - Round Discount % Entries	Select this option to cause percentage discount amounts to be rounded according to the settings of the options ["Round discount % to 0, 10]" and [Round Discount % Based on 10s Digit]. Unselect this option to round the amounts to the nearest least significant digit (for example, the penny).
3 - Round Discount % to 0, 10	This option is active only if you select the option [Round Discount % Entries]. Select this option to round percentage amounts to the nearest 0 or 10 increment. Unselect this option to round percentage amounts to the nearest 0, 5, or 10 increment.
4 - Round Discount % Based on 10s Digit	This option is active only if you select the option [Round Discount % Entries], and is affected by the setting of the option [Round Discount % to 0, 10]. Select this option to round percentage amounts based on the second least significant digit (for example, the 10s). Unselect this option to round percentage amounts based on the least significant digit (for example, the units digit).

Control Options

In Simphony v2, the Control options were moved from the RVC Parameters module to the Control Parameters module. This module can be configured at several different points within the hierarchy, including the enterprise, property, zone, and revenue center.

Option	Description
4 - Allow Void of Discount in Current Service Round Only	Select this option to allow privileged operators to void discounts only in the current service round. Unselect this option to allow privileged operators to void discounts that were posted in the current round or in any prior service round. This option must be unselected to allow operators to void discounts on re-opened checks.
34 - Print Voucher When Employee Discount or Employee Tender is Used	Select this option to print a voucher when an employee discount or an employee tender is used. The voucher prints at the validation printer designated for the workstation. Unselect this option to suppress printing of an employee discount or employee meal voucher.

Configuring discount privileges

To add discounts to checks, the operator must be associated with an employee role with privileges to apply the discount based on the discount's Privilege Group. The following other employee role options apply to discounts.

Voids/Returns

Option	Description
27 - Authorize/Perform Void of Discounts from a Previous Round	Select this option to allow employees associated with this role to void discounts that were posted in a previous transaction round, and to authorize non-privileged employees to do so as well.
70 - Authorize/Perform Void of Discounts on Closed Checks	Select this option to allow employees associated with this role to void discounts from closed checks after they have been re-opened, and to authorize non-privileged employees to do so as well. (You must also select the Authorize/Perform Void of a Discount from a Previous Round option.)

Transactions

Option	Description
20 - Post Discounts to Checks Belonging to Another Operator	Select this option to allow employees associated with this role to add discounts to checks belonging to another operator.
98 - Authorize/Perform Employee Meal Discount Override for Non-Scheduled Employees	Select this option to allow employees associated with this role to permit non-scheduled employees to receive the employee meal discount, and to authorize non-privileged employees to do so as well. This option works in conjunction with the [Employee Meal] and [Employee Meal Discount Applies to Scheduled Employees Only] options in the Discounts module.

See also

Discounts	Discount · **Manual Discount** · Automatic Discount · Automatic Coupon Discount · Automatic Discounts for Decimal Quantity Menu Items · Combination Pricing Discount · Item Price Substitution Discount · Quantity Threshold Discount · Sales Price Discount · Total Price Threshold Discount · Discount Engine · Discount Exclusivity · Discount NLU · Menu Item Group · Revenue Center Group
Learning series: Discounts	

Menu Item Availability

In Simphony, it is possible to control **Menu Item Availability**, meaning that an item can be programmed to have a specific quantity available (when a chef has prepared a pre-set number of specials, for instance), or to make the item "86'd", which means that it is unavailable for ordering at all (if the kitchen ran out of an item). Starting with Simphony 2.0, Menu Item Availability is configured in its own EMC module.

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

This article discusses PMC functionality.

This article discusses **configuration**, or various programming scenarios, or both.

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- 2 Simphony 1.x
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    - 2.1.1 Out of Item
    - 2.1.2 Item Count
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Overview

Simphony workstations display graphics on menu item SLU keys to show the availability or count remaining. When a user has checked the "Out of Item" option, an “X” graphic displays over the item’s corresponding touchscreen key, as seen for the **[MAC & CHEESE]** key. If an item has a limited quantity remaining, the item count can be displayed in the upper-right corner of the touchscreen key, as seen below on the **[FRIES]** key. Note that if the count of an item reaches 0, the item count "0" will display in the upper right and the "X" graphic will display on the key. (This is not displayed in the image.)

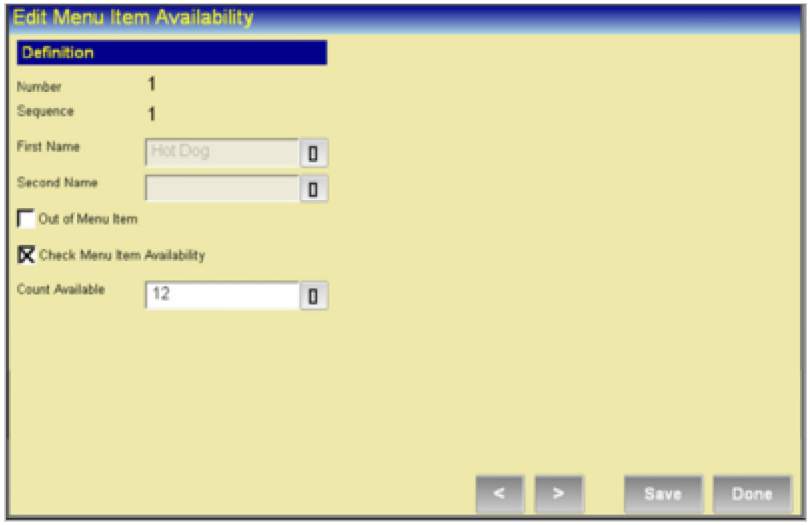
A workstation displays graphics showing the availability of **[FRIES]** and **[MAC & CHESSE]**.

In this example, when the count of the **[FRIES]** item reaches zero, users will receive the `No more FRIES remaining` message if they attempt to order it; see the Workstation Messages prompt for more information.

Simphony 1.x

Configuring

Menu Item Availability is programmed per menu item definition. In the EMC, menu item definitions are programmed in the Menu Item Maintenance module. In the PMC, menu item definitions are accessed in the menu item procedure or the menu item availability procedure.



A view of the Edit Menu Item Availability screen within the PMC.

Out of Item

Configuring an item as "86'd" is the same in both the EMC and PMC:

- Check the **Out of Menu Item** checkbox to make the item unavailable. When this is enabled, the workstation SLU keys will show an X icon over the button, as described above. When an operator attempts to ring the item, the error message `Out of Menu Item` is displayed to the user.

Note that when the "Out of Item" option is enabled, the settings of the "Check Menu Item Availability" and "Count Available" fields does not matter. Users will always receive the `Out of Menu Item` message.

Item Count

Configuring an item to check for the count available is the same in both the EMC and the PMC:

- The **Check Menu Item Availability** checkbox must be checked to enable the "Count Available" field.
  - If this option is unchecked, the definition has an unlimited quantity available (or no items are available, if "Out of Menu Item" is checked.
- In the **Count Available** field, enter the number of items that are available. It is this "Count Available" value that displays on the SLU keys. Each time the item is ordered, the number decreases to indicate the new count remaining.

First Definition Only

These configuration fields are available only for menu item definitions where the Definition Sequence Number is 1. Why? A Menu Item Master record can be programmed with multiple definitions in one RVC, however, a definition simply *defines* where a menu item displays on the screen and how it acts. For instance, the menu item "vodka" may be programmed with two definitions in a particular restaurant, where one vodka definition represents the liquor that requires a modifier, while the other definition represents vodka as a modifier (to help prompt waiters for upselling). However, these two definitions of vodka still represent the same physical bottle(s) of liquor in the restaurant.

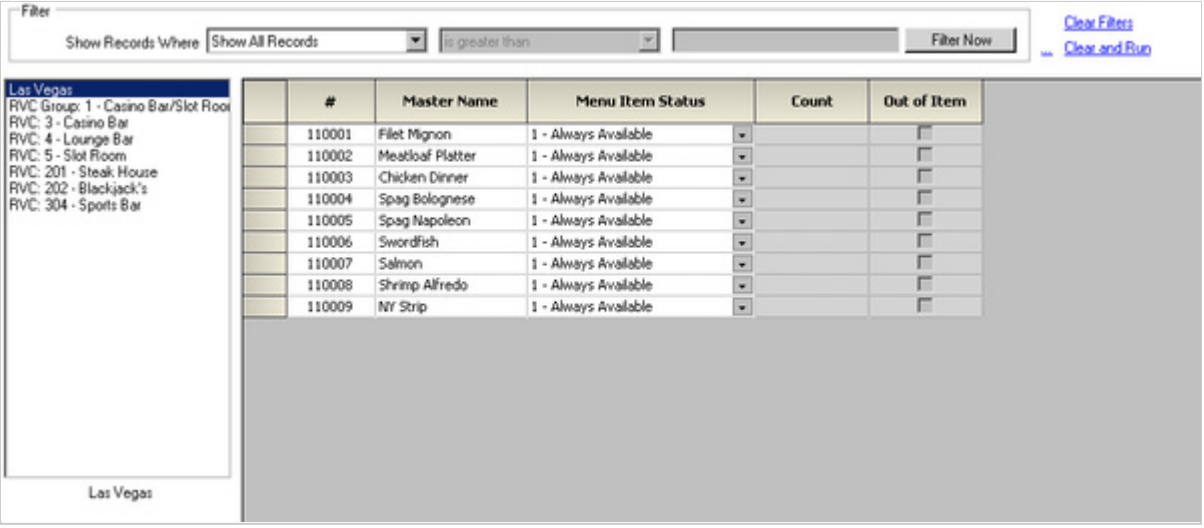
Therefore, it is not possible (or necessary) to configure each definition with menu item availability fields. Instead, the menu item availability fields are programmed only on definition #1, and the fields truly represent the availability of the *menu item master item* in the revenue center. Following our example, if this restaurant runs out of vodka, a manager can use the PMC procedure to set the "Out of Menu Item" option for definition #1, which means that no vodka is available in this revenue center.

Simphony 2.x

Starting with Simphony 2.0, Menu Item Availability is programmed in the **Menu Item Availability** EMC module, which is located on the Property Scope or RVC Scope of EMC. This module became necessary with the introduction of zoneability; while the configuration of a menu item can be performed at the Enterprise or other locations outside the traditional programming scope, its count and availability should be configured only within a Property. For example, a seafood restaurant chain using Simphony may have a Menu Item named "Maine lobster" configured at the Enterprise. Clearly it would be irrational to include the number of available lobsters with the Menu Item record that exists on the enterprise, because a lobster ordered in the New York City store does not affect an operator's ability to order a lobster in Chicago. Because of this, the Menu Item Availability module was introduced to allow the configuration of the "Count" and "Out of Item" status within a Property.

Module Overview

When the Menu Item Availability module is opened, the list box on the left displays the Property, the RVC Groups for the Property, and all RVCs in the Property. (If this module is opened from a RVC, only the current RVC is displayed.)



The **Menu Item Availability** module in EMC.

The module displays the standard Table View Filtering control that is used in other modules, and a grid that lists all Menu Item Masters in the current Property. The grid displays the following columns:

#
: This column displays the Object Number of the Menu Item Master record.

Master Name
: This column displays the Name of the Menu Item Master record.

Menu Item Status
: This column displays the status of the item. The choices are **[1 - Always Available]** or **[2 - Use Availability Settings]**.

Count
: This column is available only when the Menu Item Status is configured for **[Use Availability Settings]**. In this field, a programmer enters the remaining quantity of the item.

Out of Item

This column is available only when the Menu Item Status is configured for **[Use Availability Settings]**. When this field is checked, the selected item is unavailable for ordering. Note that when this field is checked, the setting in the "Count" field for the item is not relevant; the item will not be orderable in workstation operations.

Sample Configurations

The purpose of a Revenue Center Group is to allow multiple RVCs to use the same "kitchen", for purposes of MI Availability.

In the simplest case, one Property contains only a single kitchen, so a user would have no need to select anything other than the first entry in the list box on the left (the Property). Not all properties contain only one kitchen, however, so this module allows the configuration of Menu Item Status settings for individual RVCs or RVC Groups. In the example image, the following RVCs are configured:

- 3 - Casino Bar
- 4 - Lounge Bar
- 5 - Slot Room
- 201 - Steak House
- 202 - Blackjack's
- 304 - Sports Bar

In addition, there is one RVC Group configured, and it contains the Casino Bar and Slot Room RVCs. Given this configuration, a user can select the appropriate location to configure the availability of an item. Some examples:

Business Example	A programmer would...
"Steak House" has only 15 NY Strips left.	... select "RVC 201 - Steak House" and set the NY Strip's status to **[Use Availability Settings]**, and then configure the count to 15.
"Lounge Bar" has no Swordfish left.	... select "RVC 4 - Lounge Bar" and set the Swordfish's status to **[Use Availability Settings]** and then check the **[Out of Item]** field.
The kitchen that serves both the Casino Bar and Slot Room (RVC Group 1, Casino Bar/Slot Room) has only four Salmon dinners left.	... select this RVC Group and set the status to **[Use Availability Settings]**, and then configure the count to 4.
All bottles of wine at the Property are handled from a central location delivered by a sommelier. (This is quite possible for a small casino with only six RVCs.) The seasonal specialty wine has a total of 144 bottles available.	... select "Las Vegas" and configure the bottle of wine with a count of 144.

Configuration Validity

All the configurations above are allowed at the same time, because each configuration has been performed independently

from other items. For example, the NY Strip item at the Steakhouse cannot conflict with a NY Strip item in another RVC. However, if a programmer attempted to configure the following...

- 15 NY Strips in the Steakhouse
- 20 NY Strips for the Property

... an error would occur. There is no way have an item configured with two availability settings if the two locations overlap. Therefore, when a Menu Item at the same Object Number is configured for two different selections in the list box, EMC will prevent these configurations:

In addition to the error checking performed in the Menu Item Availability module, EMC prevents a user from saving a RVC or RVC Group if their configuration has changed, and that configuration would cause invalid Menu Item Availability settings.

1. When a Property and a RVC are programmed to control an item's availability, this is not allowed.
2. When a Property and a RVC Group are programmed to control an item's availability, this is not allowed.
3. When a RVC Group and a RVC that belongs to that group are a programmed to control an item's availability, this is not allowed.
4. When two RVC Groups are programmed to control an item's availability, and at least one RVC belongs to both groups, this is not allowed.

Module Permissions

When the module is opened from the Property Scope, EMC determines which items appear in the list box on the left.

The following determinations are made when considering the locations that appear in the list box:

- The Property is always added.
- RVC Groups from the Property are added when:
  - There are no RVCs in the RVC Group (an odd configuration!), or
  - The logged-in user has permissions to view MI Availability for every RVC in the RVC Group.
- RVCs from the Property are added when the logged-in user has permissions to view MI Availability for the RVC.

The ability to edit records is determined by the following:

- Edits to MI Availability for the Property can be made if the logged-in user has permissions to edit MI Availability from the Property.
- Edits to MI Availability for RVC Groups can be made when:
  - The logged-in user has permissions to edit MI Availability for the Property, or
  - There are no RVCs in the RVC Group (an odd configuration!), or
  - The logged-in user has permissions to edit MI Availability for every RVC in the RVC Group.
- Edits to MI Availability for a RVC can be made if the logged-in user has permissions to edit MI Availability for the RVC.

Menu Item Field Level Security Setup 2x

This article reviews the enhanced privileges for accessing the Menu Item Maintenance files and their fields in EMC.

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony v2.7.

This article discusses **configuration**, or various programming scenarios, or both.

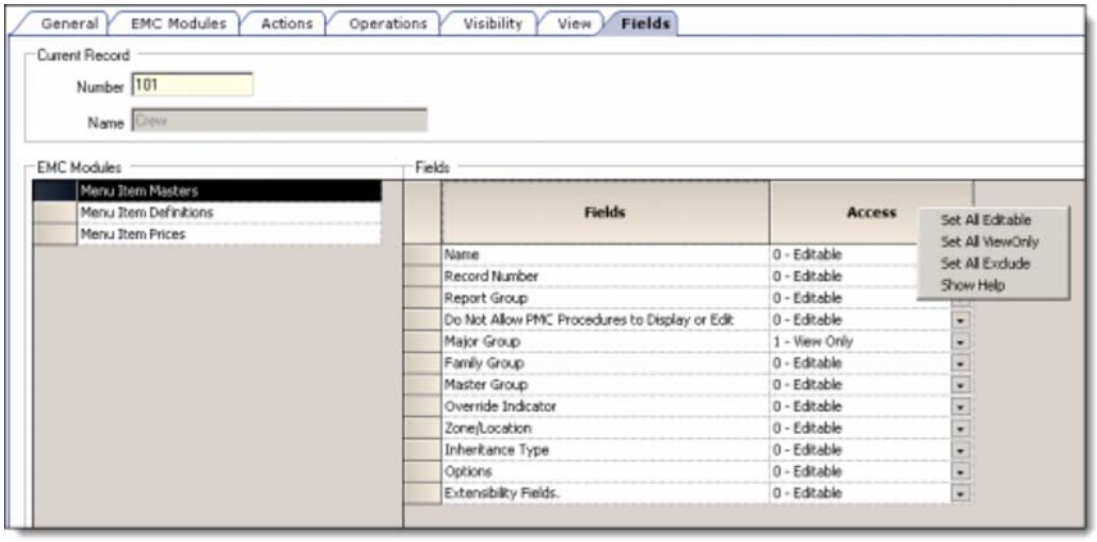
This article discusses functionality that relates to **Simphony v2.x**.

Overview

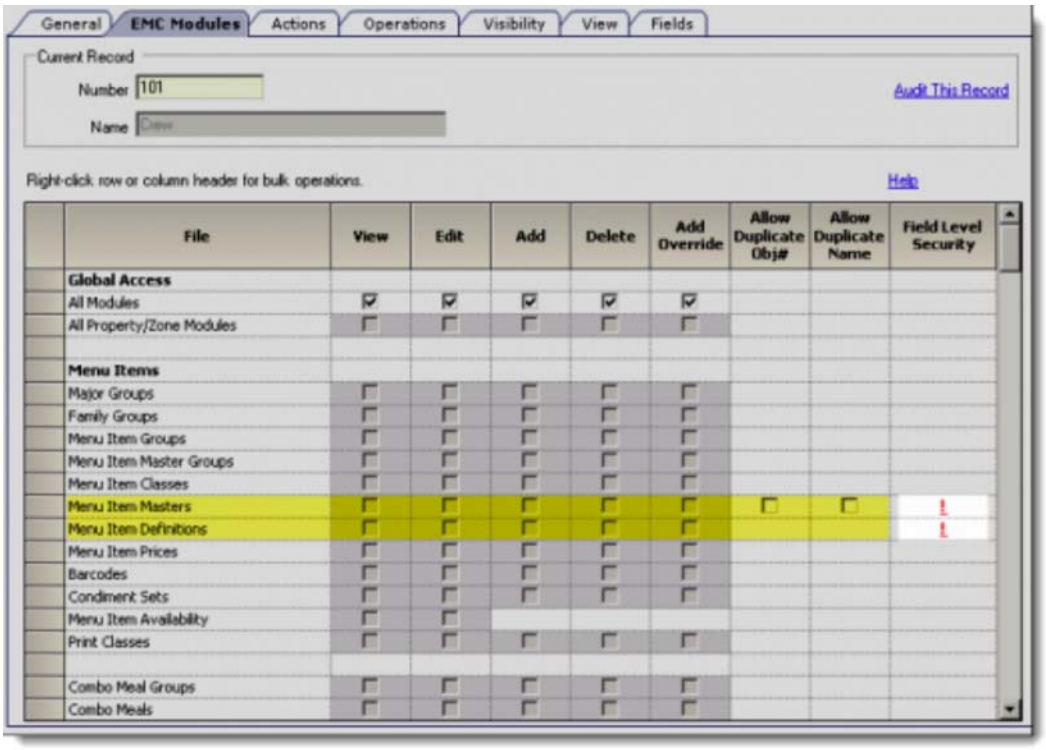
EMC Employee Role privileges have been added so that access to all of the fields within the Menu Item (MI) Master, MI Definition, and MI Price files can be controlled more precisely. Upon upgrading to this release, all current EMC and POS client access privilege controls will remain enforced. However, all of the fields within these files now have Editable, View Only, and Exclude privileges available for configuration. By default, all of the new field access levels are set to Editable (full access privilege).

EMC Configuration

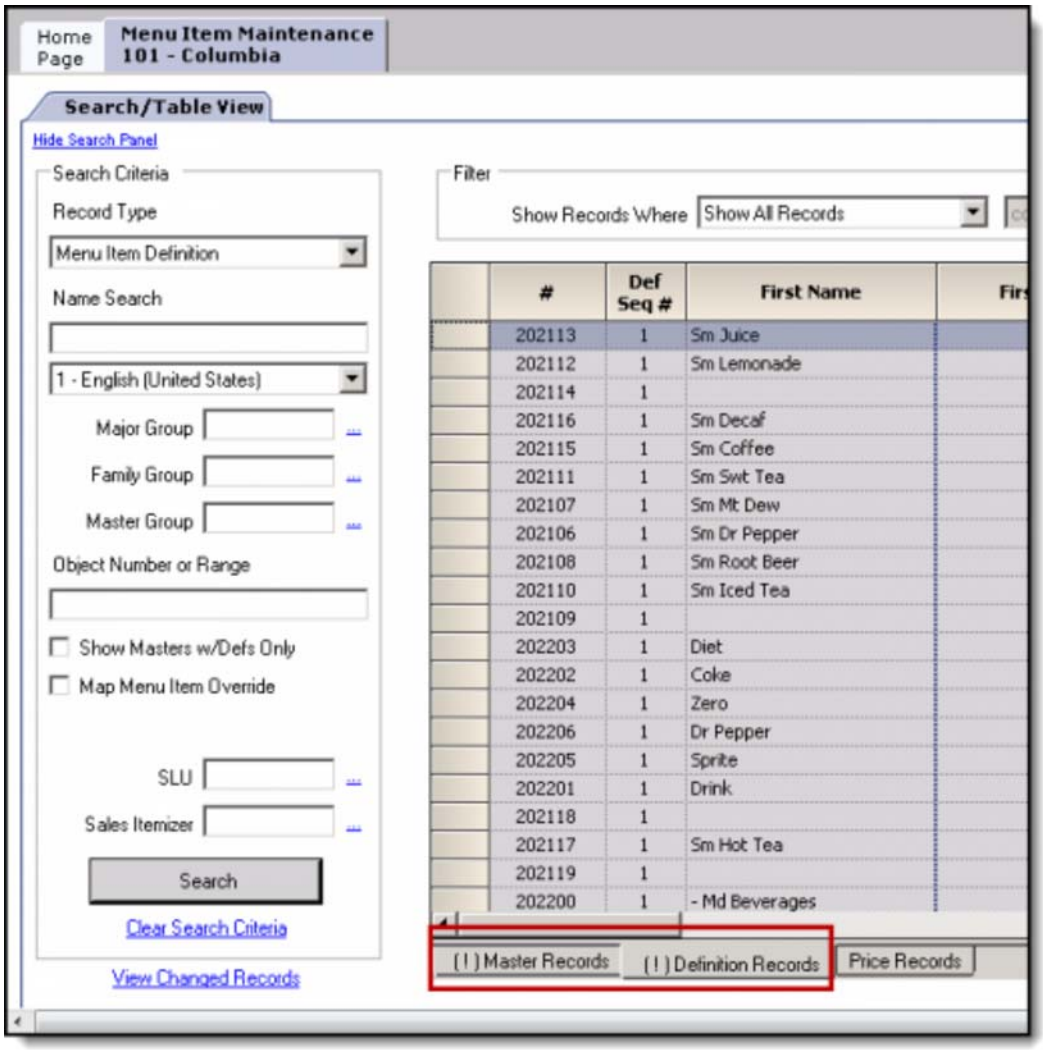
A **Fields** tab has been added to the *EMC | Enterprise level |Configuration tab | Personnel | **Roles*** module. For each of the MI Maintenance files, the access levels can be set under the **Access** column.



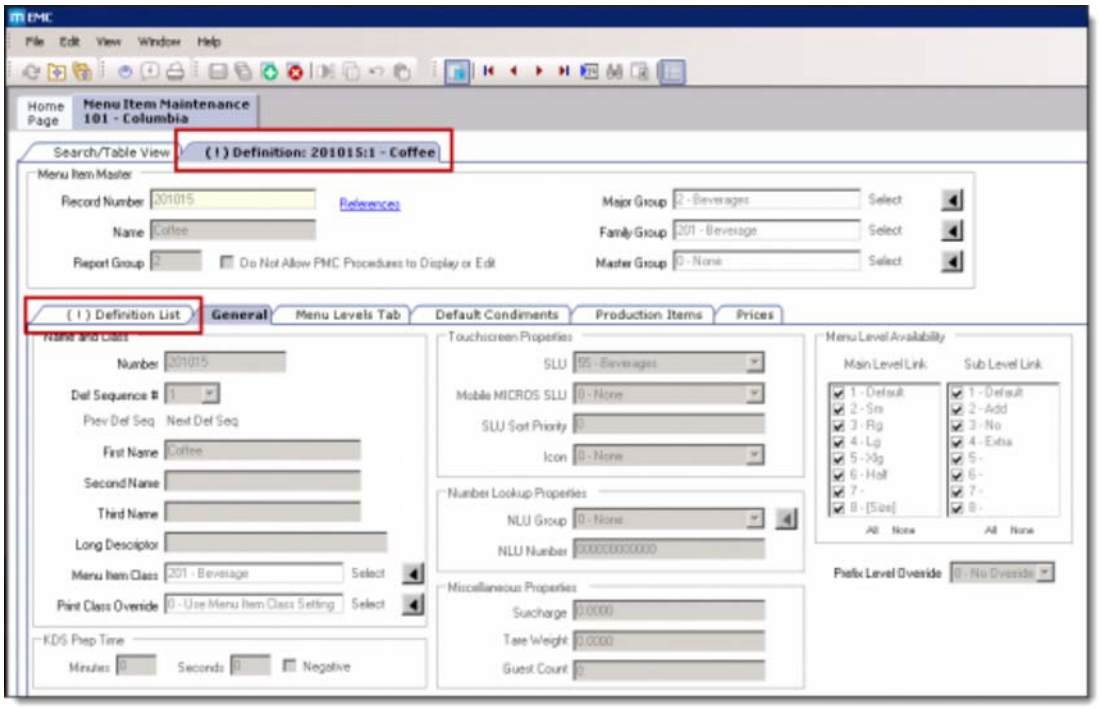
In the *EMC | Enterprise level |Configuration tab | Personnel | Roles | **EMC Modules tab***, a **Field Level Security** column has been added. This column will show an indicator if any of the access privileges located in the Fields tab have been set to View Only or to Exclude access settings.



The indicators display on the tabs located in the MI Maintenance module in Table view. Additionally, if a user attempts to filter a search using an excluded field, the Filter will become disabled.



The indicators also display on the tabs located in the MI Maintenance module in Form view.


EMC
File Edit View Window Help
Home Page
Menu Item Maintenance
101 - Columbia
Search/Table View
(!) Definition: 201015:1 - Coffee
Menu Item Master
Record Number 201015
References
Name Coffee
Report Group 2
Do Not Allow PMC Procedures to Display or Edit
Major Group 2 - Beverages
Family Group 201 - Beverage
Master Group 0 - None
Select
(!) Definition List
General
Menu Levels Tab
Default Condiments
Production Items
Prices
Number 201015
Def Sequence # 1
Prev Def Seq
Next Def Seq
First Name Coffee
Second Name
Third Name
Long Descriptor
Menu Item Class 201 - Beverage
Print Class Override 0 - Use Menu Item Class Setting
KDS Prep Time
Minutes 0
Seconds 0
Negative
Touchscreen Properties
SLU 55 - Beverages
Mobile MICROS SLU 0 - None
SLU Sort Priority 0
Icon 0 - None
Number Lookup Properties
NLU Group 0 - None
NLU Number 00000000000
Miscellaneous Properties
Surcharge 0.0000
Tare Weight 0.0000
Guest Count 0
Menu Level Availability
Main Level Link
Sub Level Link
1 - Default
2 - Sm
3 - Rg
4 - Lg
5 - Xg
6 - Half
7 -
8 - [Size]
1 - Default
2 - Add
3 - No
4 - Extra
5 -
6 -
7 -
8 -
All None
All None
Prefix Level Override 0 - No Override

Oracle® Hospitality

Simphony 2.x

Menu Items Guide

February 2015

ORACLE

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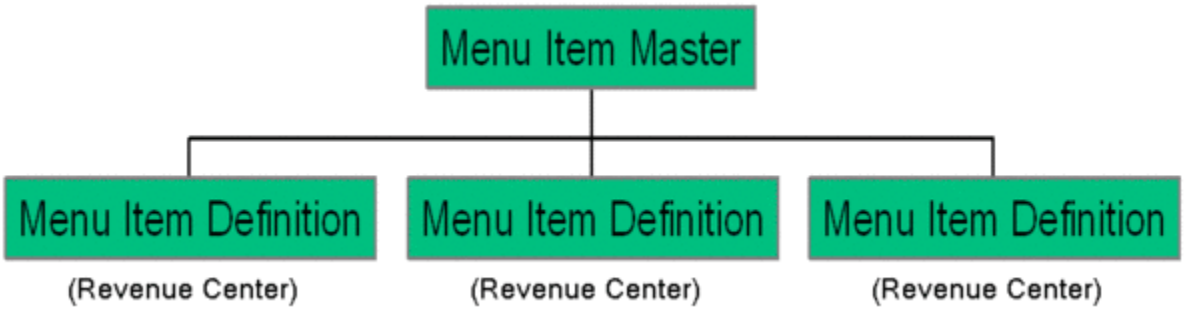
Menu Items (overview)

A **Menu Item** is the core foundation of all transactions. Everything "ordered" or "rung in" for our systems is a Menu Item. In restaurant Revenue Centers, it is obvious that drinks and entrees, etc., are Menu Items. Perhaps less obviously, in retail Revenue Centers, shirts and pants (etc.) are also considered Menu Items. Therefore, in Simphony, it can be said that any item being sold is a Menu Item.

Menu Item Hierarchy

This section discusses the relationship between Menu Item Masters, Definitions, and Prices. For a complete overview of Masters, Definitions, and Prices, see the individual articles on those topics.

Overview



This diagram shows the relationship between Menu Item Masters and Menu Item Definitions. A definition resides in a Revenue Center. A definition may or may not have a price, and it may have multiple prices.

There are three terms that describe menu items:

- Menu Item Master
- Menu Item Definition
- Menu Item Price

Property (MI Master)

Main article: Menu Item Master

Menu Item Master records exist on the property scope. This record doesn't contain much information:

- The Name of the item
- The Number of the item

- The Report Group of the item
- The Major Group of the item
- The Family Group of the item

As you can see, a Menu Item Master doesn't actually do anything. It does not show on touchscreens, it does not have a price... it basically does nothing *except* it shows on Menu Item Reports. That, of course, is very important.

There is only one Menu Item Master per property for a Menu Item. For instance, in a properly-programmed database, only one "Shrimp Cocktail" Master Record exists. Looking at the diagram, you see that a Menu Item Definition exists in a Revenue Center. This is where we *define* how a Menu Item Master Record acts.

Revenue Center (MI Definition)

Main article: Menu Item Definition

A **Menu Item Definition** defines how the Menu Item Master acts; or how and when it appears to a user:

- The SLU on which the item appears
- The NLU on which the item appears
- The Menu Level(s) where it is active
- The Name of the item for touchscreens and Order Devices
- The Menu Item Class to which it belongs.

Menu Item Prices

Main article: Menu Item Price

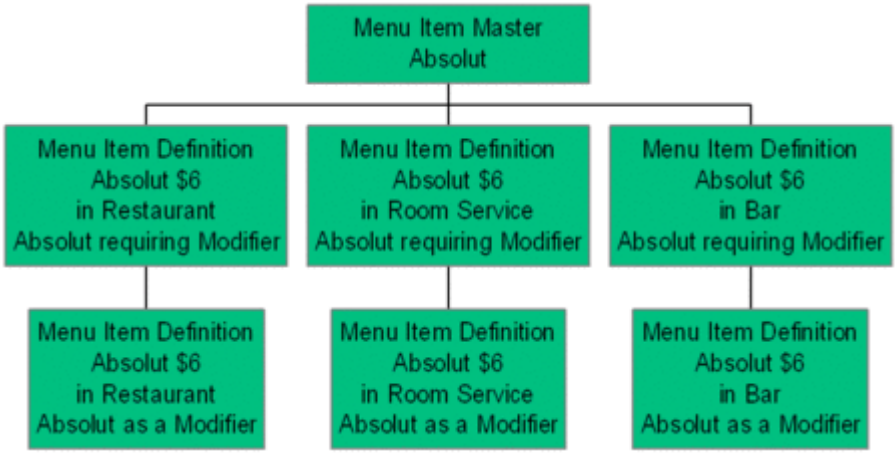
A menu item definition might have one or more prices, or it may have none. Here are some examples for using Menu Item Prices.

- **Multiple Prices**
  - Up to 8 prices can exist for a single menu item definition.
  - Perhaps two prices exist: One for a "Double" Liquor Menu Level and one for the regular price of liquor
  - Perhaps three prices exist: Small, Medium, and Large Sodas
  - Perhaps different prices exist to override the Menu Item Class tax class.
- **No prices**
  - The items "Medium Well" and "Without Tomato" would not be programmed with a price record. It is typical for condiment items to be programmed without price records.

With multiple prices programmed, which price record is going to be used when an item is ordered? The price article includes details about determining the active price.

Configuration

Multiple Definitions



In the diagram shown, it just happens that the price of every definition is the same. This is not necessarily how a site would be programmed. Even a small three-RVC hotel such may have different prices — often the Room Service RVC is a little more expensive.

To expand on the Property/Revenue Center hierarchy shown above, it should be noted that it is also possible to have multiple Menu Item Definitions in one RVC! In fact, this is a quite common scenario. Because a definition only *defines* how an item acts/appears to a user, it is possible to make an item behave multiple ways in one RVC. Indeed, a single Revenue Center can have up to 64 definitions for the same item — although it is very unlikely that more than 5 or 6 definitions exist.

Common Example

A common example of this configuration is the progamming of liquor. Sometimes, liquor is ordered like this:

- Ring the liquor (Absolut 6.00) which prompts for a descriptor of how the item is made (Bloody Mary 0.00)

And sometimes liquor is ordered like this:

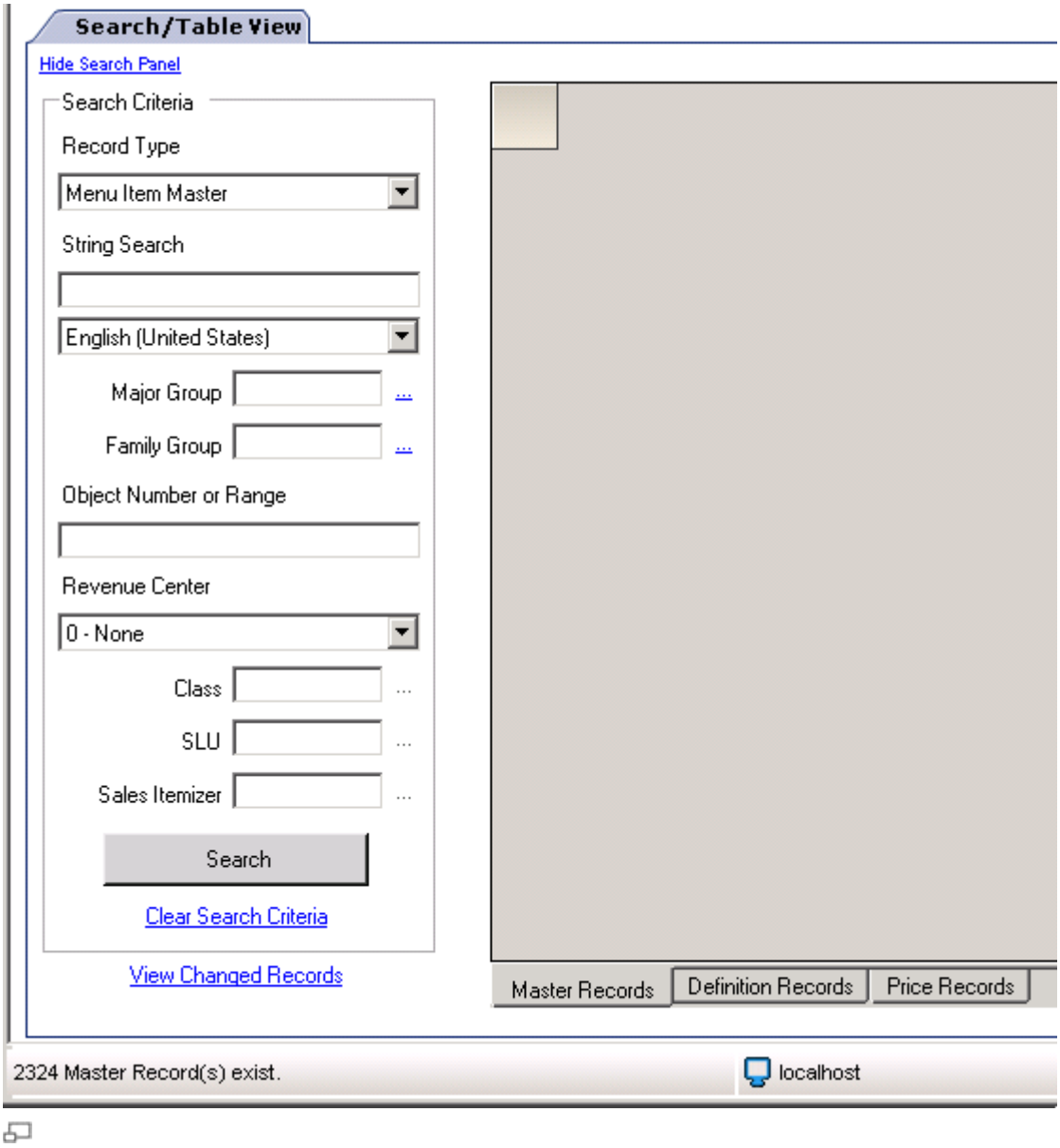
- Ring the name of a drink (Bloody Mary 0.00) which prompts for the type of liquor (Absolut 6.00)

Either way the item is ordered, we're still ringing in a Bloody Mary with Absolut Vodka (see more about Programming Liquor). In a small hotel with three revenue centers, the diagram at the right describes this possible configuration.

Menu Item Maintenance

Menu Item Maintenance is the EMC module used to configure menu items; it is probably the most-used module in EMC. When compared to other modules, Menu Item Maintenance has some unique features: it can be opened from the RVC scope or the Property scope, its Table View offers a search feature, and it offers multiple ways to distribute records.

Opening the Module



Unlike other Table View/Form View modules, Menu Item Maintenance offers a search box. Because several thousand Menu Item records are likely to exist, the search box allows a user to work with only desired records.

Menu Item Maintenance can be opened from the Property Scope or the RVC Scope of EMC. Initially, no records display in the Table View grid; the user sees only the Table View tab, which includes the search criteria box and an empty Table View grid. In the status bar, the number of existing records is displayed. In the example image, the number of master records is being displayed because the user opened MI Maintenance from the Property Scope. When MI Maintenance is opened from the RVC Scope, the number of definition records displays (if a user does not have permissions to view definition records but does have permissions to view price records, the number of price records displays).

Other points to note:

- The Revenue Center drop-down in the Search box includes only the RVCs that the user is able to see, based on the RVC-Level Security settings for the logged-in employee.
- The Master, Definition, and Price tabs under the grid display based on user permissions. If a user cannot view Master or Definition records, only the Price tab will display. (The "Record Type" drop-down in the search box follows this same behavior.)

RVC Scope vs. Property Scope

Menu Item Maintenance is operationally the same when opened from the RVC Scope or the Property Scope. EMC was designed with this module on both scopes for both security and convenience. This dual-module functionality is more secure because it allows some users, such as Property Experts, to be programmed with permissions to edit Menu Items in multiple RVCs; less-privileged users could be programmed to access Menu Items for specific RVCs only (see Revenue Center-Level Security). This dual-module functionality is convenient because a user can work within the scope of a single RVC without having to change the RVC drop-down (and other RVC drop-downs in the add/delete dialogs).

The following limitations are observed when the module is opened from the RVC Scope:

- The "Revenue Center" drop-down box is locked at the Revenue Center in which the module was opened.
- When viewing Menu Item Master records, the only records that will display are those which have definitions in the current RVC. (This same result is produced when the module from the property scope, the user selects a Revenue Center, and then the user searches for Menu Item Master records.)

- When viewing the Definition Summary view, only definitions from the current RVC will display.

Using the Search Features

By default, no items appear in Table View. To view all records, a user can press "Search" with all the search criteria empty. ***Note:*** *Depending on the number of menu items in the database, it may be unwise to use "Search" without entering any search parameters.* To perform a search using specific parameters, enter the desired information into the search fields and then press "Search". The search will consider all the search criteria entered, making it possible to create searches such as *show all appetizers that belong to Menu Item Class #20*. Note that the user must save changes to changed records before performing a search. The following parameters can be searched:

The Major Group, Family Group, Class, SLU, and Sales Itemizer fields allow direct numeric entry. To choose a value from the list, click the ellipsis ("...") next to the text box to view the list of available selections.

Record Type
: This field determines what types of records will display in Table View when a search is performed: Masters, Definitions, or Prices.

String Search
: When using this field, records will only be returned when they contain the text in the name field for the specified language. Note that Menu Item Definition/Price searches will look for the text in either the Name 1 or Name 2 fields. (Note: SQL text comparisons often take longer than comparisons that do not search text. While typing "Shrimp Cocktail" will return the specific record you want, a family group search on "Appetizers" will return results more quickly.)

Major Group
: Enter a Major Group number or a range of Major Group numbers to be included in the search. Note that this range can contain "0" as a choice, but not with other object numbers. For instance, "0" is valid, "1-4" is valid, and "1,2,3" is valid; but "0,2,3" is not valid.

Family Group
: Enter a Family Group number or a range of Family Group numbers to be included in the search. Note that this range can contain "0" as a choice, but not with other object numbers. For instance, "0" is valid, "1-4" is valid, and "1,2,3" is valid; but "0,2,3" is not valid.

Object Number or Range
: Enter an object number or range of object numbers to be searched, or leave the field blank to include any range of object numbers.

Revenue Center
: Select a Revenue Center to be used in the search. This field is used when selecting Definitions or Prices. Also, when this field is selected and Menu

Item Master records will be returned, only Master Records with Definitions in the selected RVC will be included in the results.

Class

When "Menu Item Definition" or "Menu Item Price" is chosen as the Record Type, enter a Menu Item Class or range of Menu Item Classes to be included in the search. This field is only enabled when the "Record Type" is not Master, and when a specific RVC is selected.

SLU

When "Menu Item Definition" or "Menu Item Price" is chosen as the Record Type, enter a SLU or range of SLUs to be included in the search. This field is only enabled when the "Record Type" is not Master, and when a specific RVC is selected.

Search Trick! Often, users need to verify that all the Sales Itemizers match the Major Groups for every item in a database. (This is often the necessary configuration when interfacing to PMS systems.) To verify this configuration, a user could search for "Major Group = 1" and "Sales Itemizers = 2-15". The search results will display any record that is in the #1 Major Group but is not programmed in a MI Class with the #1 Sales Itemizer.

Sales Itemizer

When "Menu Item Definition" or "Menu Item Price" is chosen as the Record Type, enter a Sales Itemizer or range of Sales Itemizers to be included in the search. This field is only enabled when the "Record Type" is not Master, and when a specific RVC is selected.

Master vs. Definition/Price

Searches for Menu Item Master records are slightly different than searches for Menu Item Definition and Menu Item Price records:

- The Class, SLU, and Sales Itemizer fields are specific to Menu Item Definitions and Prices. Thus, the fields are disabled and any values in the fields are not considered when searching for Menu Item Master records.
- When searching for Menu Item Master records, the Revenue Center field is considered. When this field has a value other than 0, the search will return only Menu Item Master records that contain definitions in the selected RVC.

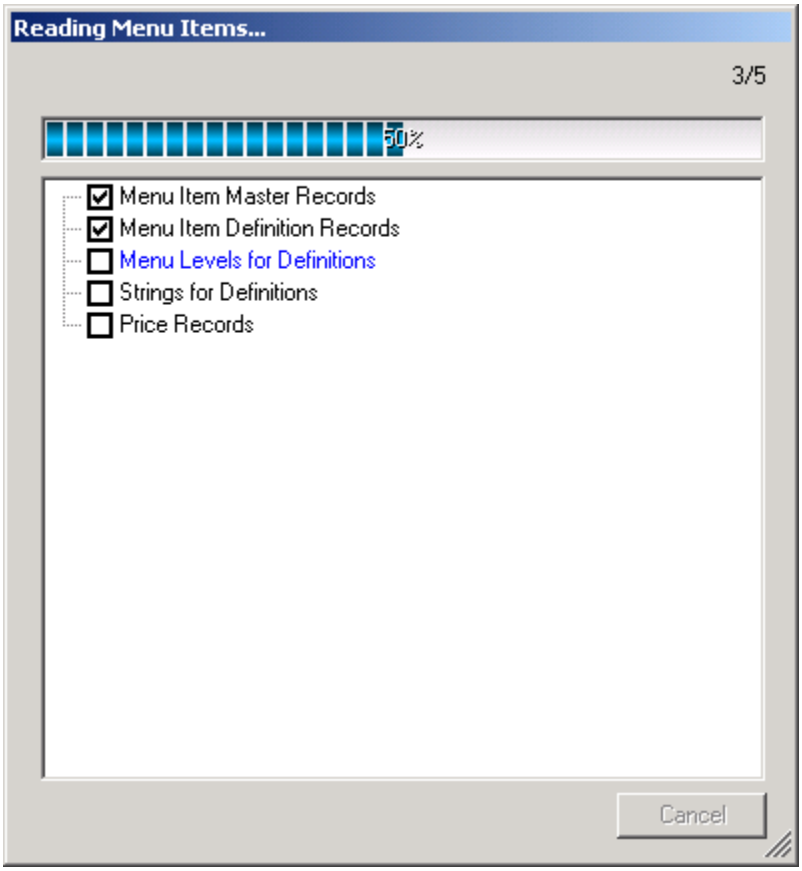
Using the Table Tabs

Under the table, there are tabs for the different types of records: Masters, Definitions, and Prices. These tabs are designed to allow a programmer to toggle between master, definition, and price records quickly. These tabs are only functional after a list of items has been retrieved from the database. In the

example image above, if the user selects a Revenue Center and then clicks "Definition Records", definition records for the RVC will display.

When using these tabs to view Definitions or Prices, the "Revenue Center" drop-down from the search panel must have a non-0 value.

More Search Panel Functionality



When records are being retrieved from the database, the **Reading Menu Items...** dialog displays the progress of the search.

Other notes about using the Search Features:

Hide Search Panel
: When the "Hide Search Panel" link is clicked, the search panel is removed from view and the table view grid expands for a full screen display. When the grid appears on the full screen, the link changes to "Show Search Panel"; clicking this link restores the Search Panel to view.

Clear Search Criteria
: The "Clear Search Criteria" link resets all the search parameters to the defaults (blank text boxes). The Revenue Center field is not affected by this link.

View Changed Records

This link does not affect the search functionality; it is discussed here because it is a part of the Search Panel. Click this link to display a list of all the records that have been changed. In most modules, a changed record appears as a yellow row in Table View. This is also true in Menu Item Maintenance, but because it is possible to make changes in multiple locations within the GUI, this link allows users to see changed records that may no longer be in view.

Table View Filtering

The grid also includes the standard Table View Filtering functionality, allowing a user to filter the results after they have been retrieved from the database. The MI Maintenance functionality is the same as filtering in other modules, however MI Maintenance also keeps track of the initial search when records are retrieved from the database. When the breadcrumbs link is clicked, EMC displays the search criteria used to get to the current state.

Working with Records

After entering search parameters, the table view grid shows the records that meet the search criteria. Like other EMC modules, the user can navigate between Table View and Form View by using the Table View Toggle icon, or by double-clicking the record number. In Menu Item Maintenance, it is also possible to change between the Table/Form views by clicking the tab that displays the data. (The Form View Tab is not visible and the Table View Toggle icon is disabled until a record has been viewed in Form View by double-clicking.)

For all records in Table View, records can be edited just like any other Table View module. The right-click menu is similar to other modules, but there is not a "Quick Add" option. Also note that the "Undo" option is only available via the right-click menu; it is not available in Form View.

Navigating Master Records

Menu Item Master records can be configured in two places: Table View and Form View. The Menu Item Master record is unique because it is displayed in Form View when viewing Definition and Price records.

Table View

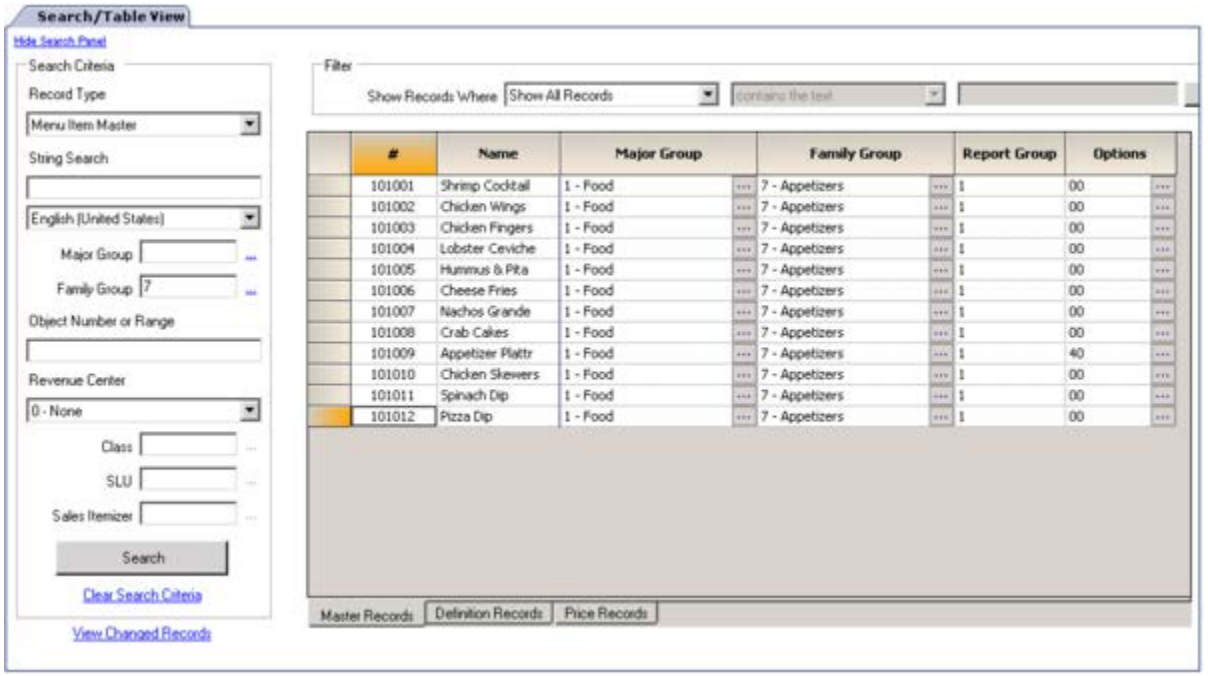
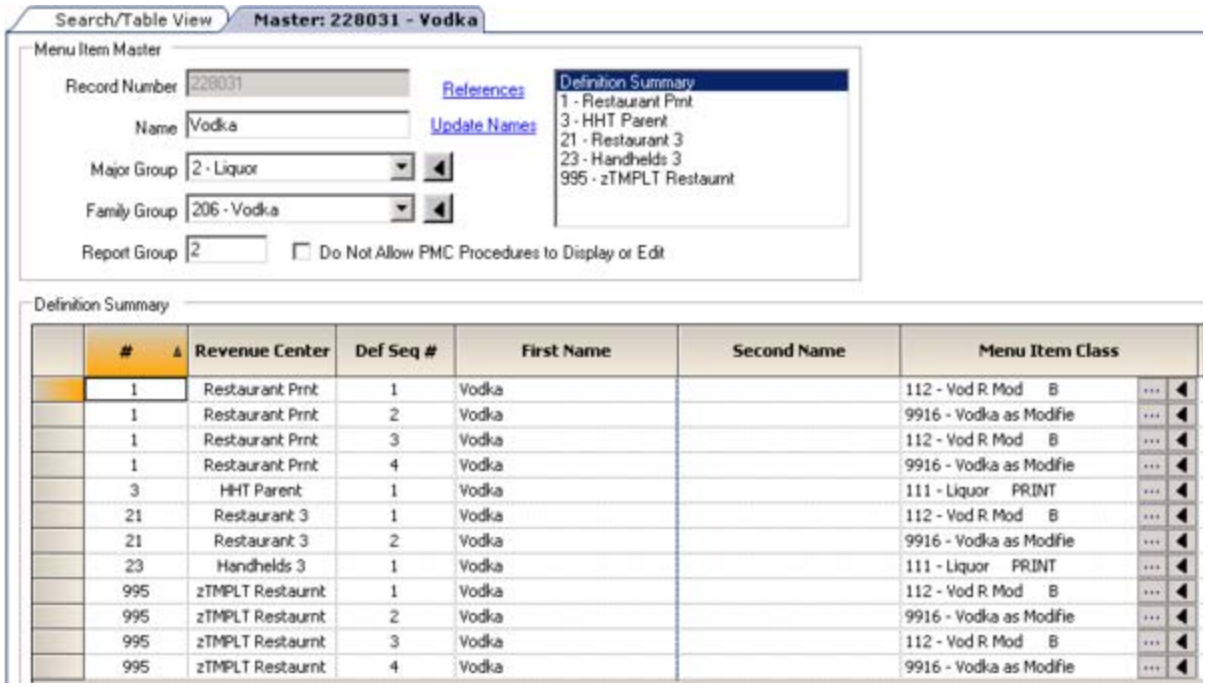


Table View after a search for appetizer records.

In the example image, the user searched for Menu Item Master records that are appetizers, and the appropriate records are returned. The status bar is not displayed in the image, but it would show "12 record(s) read" after retrieving the 12 records that are displayed.

To enter Form View, double-click the Object Number of the desired record.

Form View



Form View for a Menu Item Master Record. This view is called the "Definition Summary" view; the Menu Item Master configurable fields are at the top of the form, then all Menu Item Definitions display below. This view allows users to see all definitions associated with a single master record. When a definition is double-clicked, Form View for the selected record displays (shown below).

Form View for Menu Item Master records defaults to the "Definition Summary", which shows the Menu Item Master information at the top of the screen, and then all Menu Item Definition records associated with the Master Record below. From here, individual Menu Item Definition records can be displayed in Form View by using a double-click on one of the definition records. (More discussion below.)

The text on the Form View Tab for Master Records shows the word "Master" followed by the number and name of the item:

```
Master: 229031 - Vodka.
```

Navigating Definition Records

'**Menu Item Definitions** can be configured in three places: Table View and Form View, and also in the "Definition Summary" view that displays all definitions for a single Master Record.

Table View

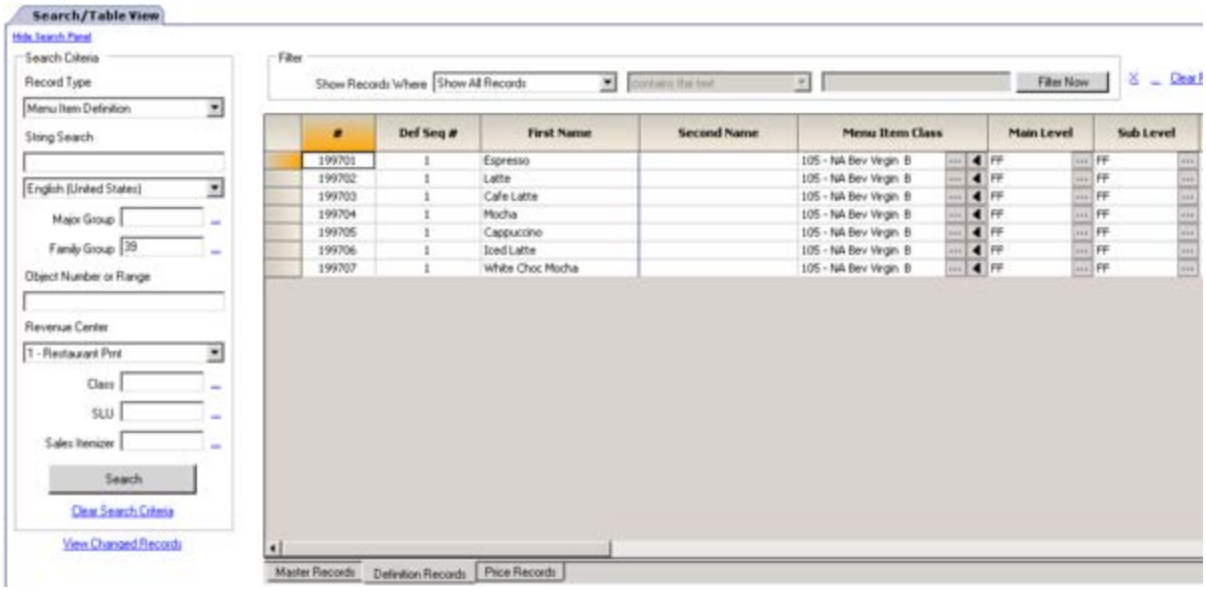


Table View after a search for Cappuccino/Espresso definitions.

In the example image, the user searched for Menu Item Definition records that are in Family Group 39 (Cappuccino/Espresso records, in this database), and the appropriate records are returned. The status bar is not displayed in the image, but it would show "7 record(s) read" after retrieving the seven records that are displayed.

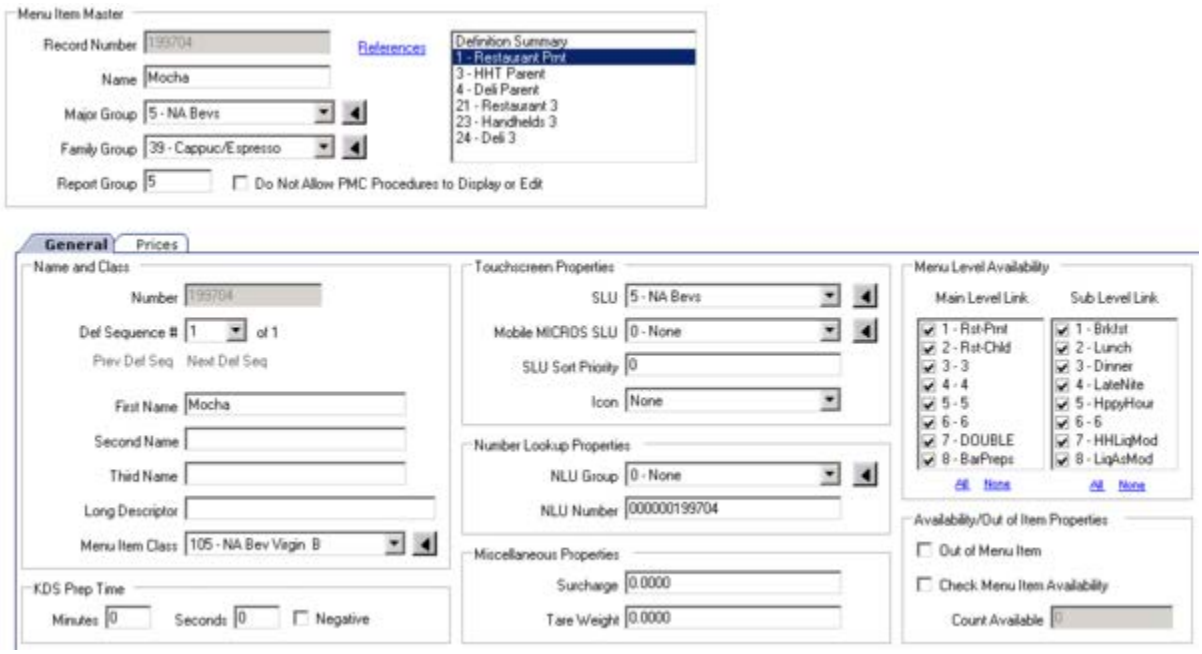
From this view, records can be edited just like any other Table View module. To enter Form View, double-click the Object Number of the desired record.

Copy Master Names

In some databases, especially older databases that were upgraded, Menu Item Definition names may have become out of sync with Menu Item Master names due to poor programming. This causes problems where a definition's name may say "Iced Tea", but it is in fact a definition belonging to the Master item "Soda". In this scenario, a user sees "Iced Tea" on the touchscreens, but the item reports as a "Soda" sold. To correct this, a user can choose one of the right-click menu options that are unique to Menu Item Definitions:

- Copy Master Names: This function will update the selected definition names to have the same name as the corresponding Menu Item Master record.
- Copy Master Names (Clear 2nd Name): This function will update the selected definition names to have the same name as the corresponding Menu Item Master record, and it will make the Second Name fields for the selected definitions blank.

Form View



Form view for a Menu Item Definition Record. In Form View, the Menu Item Master record displays at the top of the screen, with the configurable MI Definition fields below, on the General Tab.

When a user switches from viewing Definitions in Table View to Definitions in Form View, the initial display is the General tab, which includes all the Definition fields. The Master Fields always display (giving the user an understanding of the Master/Definition relationship), but they may be disabled based on Employee Role permissions.

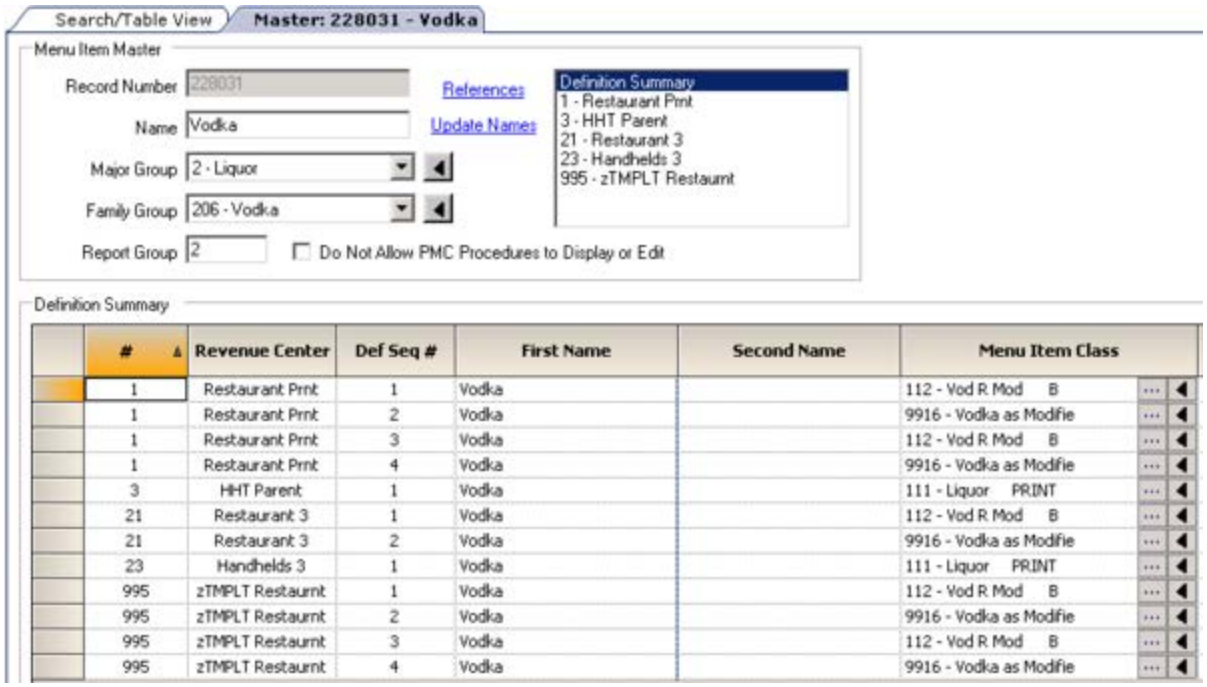
The text on the Form View Tab for Definition Records shows the word "Definition" followed by the number, sequence number, and name of the item:

```
Definition: 199704:1 - Mocha
```

Form View for Menu Item Definitions and Menu Item Prices is comprised of three sections:

- Menu Item Master fields
- General Tab (MI Def fields)
- Price Tab (MI Price fields)

Definition Summary



Form view for a Menu Item Master Record. This view is called the "Definition Summary" view; the Menu Item Master configurable fields are at the top of the form, then all Menu Item Definitions display below. This view allows users to see all definitions associated with a single master record. When a definition is double-clicked, Form View for the selected record displays (shown below).

Another Form View image of a Menu Item Definition. Note that the "Prev Def Seq" and "Next Def Seq" links are enabled, allowing the user to quickly navigate from one definition sequence to the next.

If Table View of Menu Item Maintenance is showing Menu Item Master records, the Form View for Menu Item Master records will default to the Definition Summary view (example image), which shows all menu item definition records associated with a single Master. From this view, a double-click on one of the rows will display the selected definition in Form View, as shown below.

From the Definition Summary View, clicking the Update Names link causes all the Menu Item Definitions in the grid to update their first names to the same value as the Menu Item Master record.

Other Considerations

When viewing Menu Item Definitions in Form View, some fields are enabled and some fields are disabled, based on the method of entering Form View. The following scenarios determine which controls are enabled:

- Menu Item Masters in Table View:

  Prev/Next Def Seq Links are enabled. When menu item masters are displayed in Table View, all definitions of each master record are viewable, therefore the links are enabled to allow easy navigation from one definition to the next.

- Menu Item Definition or Price records in Table View:

  Prev/Next Def Seq Links are disabled. When a user is viewing menu item definitions or prices in Table View, the Prev/Next links are disabled. Because different search criteria can be used to obtain menu item definition records (perhaps a search by MI Class was used), it is possible that only definition #2 of an item is in the Table View list, even though four definitions of the item exist in the database. In addition, Table View can be sorted or filtered by any column, again making the "prev/next" links become impossible to use when Definitions are the Table View record.

Navigating Price Records

Menu Item Price records can be configured in two places: Table View and Form View. Form View for Menu Item Price records is the same view as Form View for Definitions; the only difference is that when switching from Table View to Form View, the Form begins on the Price tab instead of the General tab.

Table View

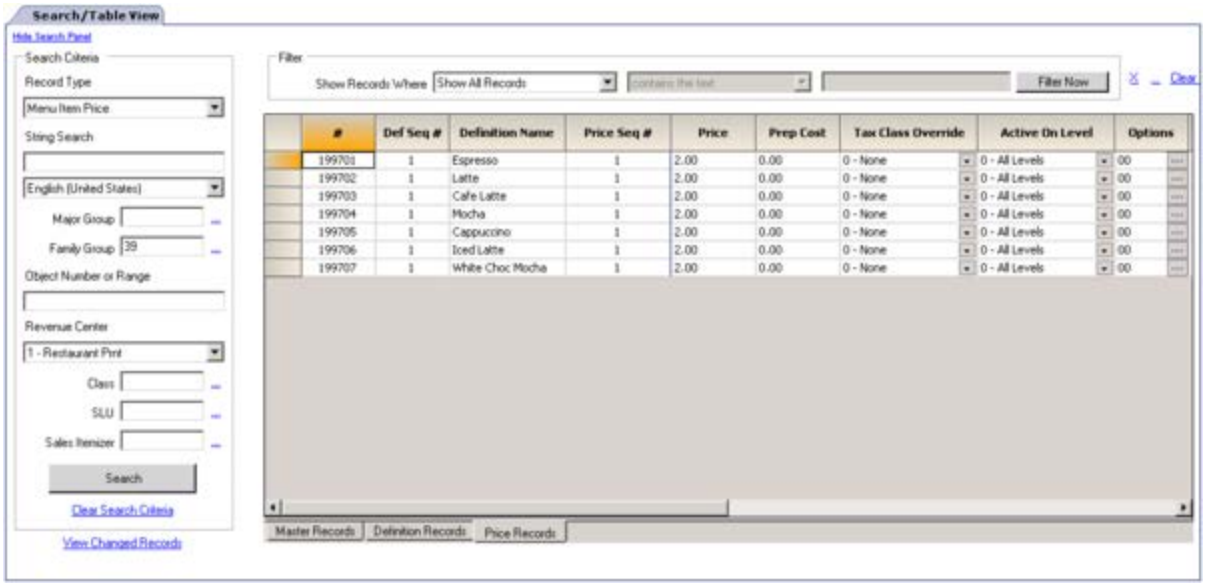
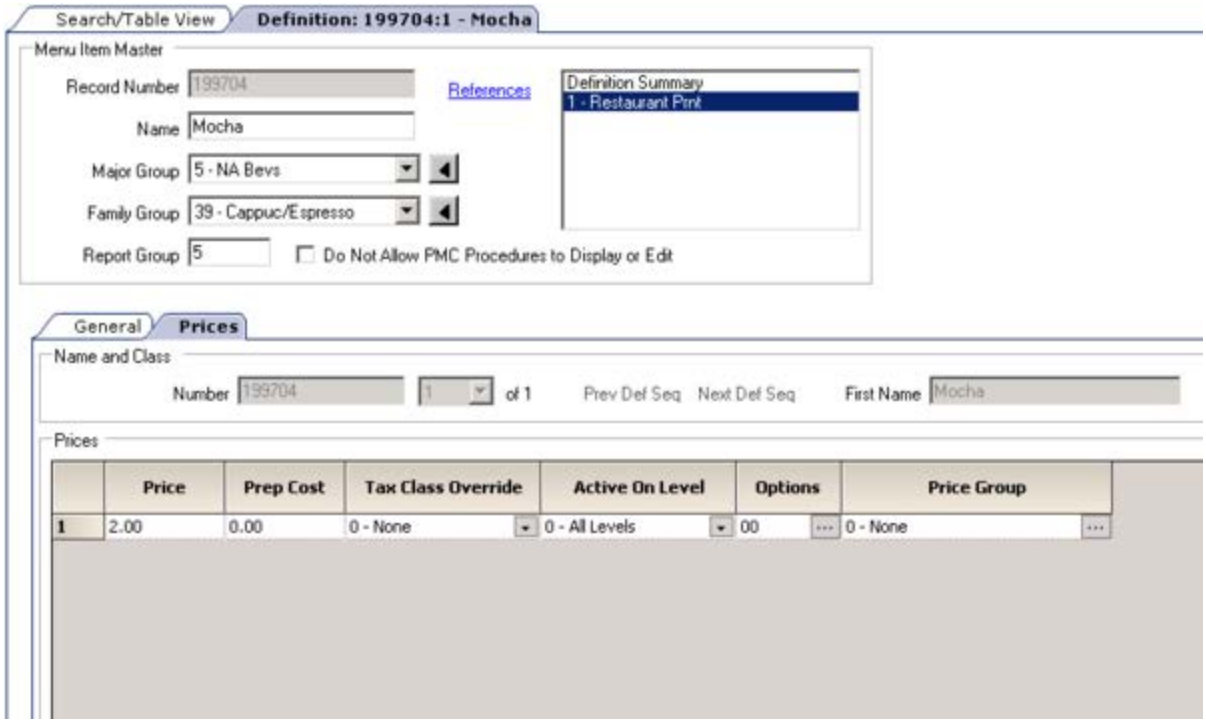


Table View after a search for Cappuccino/Espresso prices.

In the example image, the user searched for Menu Item Price records that are in Family Group 39 (Cappuccino/Espresso records, in this database), and the appropriate records are returned. The status bar is not displayed in the image, but it would show "7 record(s) read" after retrieving the seven records that are displayed.

From this view, records can be edited just like any other Table View module. To enter Form View, double-click the Object Number of the desired record.

Form View



Form view for a Menu Item Price Record. In Form View, the Menu Item Master record displays at the top of the screen, with the configurable MI Price grid below, on the Price Tab. The Price grid allows up to eight prices.

When a user switches from viewing Prices in Table View to Prices/Definitions in Form View, the initial display is the Price tab, which displays all the Prices associated with a single Definition. The Master Fields always display (giving the user an understanding of the Master/Definition relationship), but they may be disabled based on Employee Role permissions.

The text on the Form View Tab for Price Records shows the word "Definition" followed by the number, sequence number, and name of the item:

```
Definition: 199704:1 - Mocha
```

Form View for Menu Item Definitions and Menu Item Prices is comprised of three sections:

- Menu Item Master fields
- General Tab (MI Def fields)
- Price Tab (MI Price fields)

On the price tab, only the prices in the grid are configurable. The "Name and Class" group box shows information relevant to the Menu Item Definition; these fields are always disabled on the price tab.

Adding Records

Main Articles
Adding a Menu Item
Adding Menu Item Masters
Adding Menu Item Definitions
Adding Menu Item Prices

The insert dialog follows user permissions. For instance, a user who cannot add Menu Item Master records will not have access to the dialogs for inserting Master Records.

The term **adding records** is an ambiguous term when discussing menu items. It is possible to add a brand new Master record, to add Definitions to Master records, to add Prices to Definitions, or to add a new Master record including all definitions and prices at once. Because of the necessary distinction when discussing these topics, there is not a single standard insert dialog for menu items. In fact, the dialog changes based on the location within Menu Item Maintenance when the Insert dialog is requested:

- In Form View:
  - When viewing Prices, it is only possible to add additional prices to the currently-viewed definition.
  - When viewing Definitions, it is only possible to add additional definitions to the currently-viewed master.
  - When viewing the Definition Summary tab, it is possible to "Add Definition Records to this Master", in addition to adding a Menu Item Master records.
- In Table View, the same choices are always available:
  - Add Master Record from Template
  - Add Master Records without a Template
  - Add Definitions to Masters
  - Add Prices to Definitions

In addition, Table View attempts to default to the choice that is most relevant to the user at the time the Insert Dialog is opened:

Current Record Type	Condition	Default
Master	No items in the grid	Add Master Record from Template
Master	One item is selected	Add Master Record from Template; the template record defaults to the selected item.

Master	Multiple items are selected	Add Definitions to Masters; the range type defaults to "Selected Records" with the records that have been selected.
Definition	No items in the grid	Add Definitions to Masters; the range type defaults to "Record Number or Range" for user-defined entry.
Definition	One or more items are selected	Add Prices to Definitions; the range type defaults to "Selected Records" with the records that have been selected.
Price	*All Scenarios*	Add Prices to Definitions; the range type defaults to "Select Range"

Deleting Records

When deleting Menu Item Master records, any barcode record that is linked to the Master will also be deleted. When deleting price or definition records, deletion is not allowed if a barcode is linked to the record.

Records can be deleted in Menu Item Maintenance by pressing the delete key on the keyboard, using the right-click delete option, or by using the delete icon on the navigation bar. The delete prompt changes based on the user's location within Menu Item Maintenance when the Delete Dialog is requested:

- In Form View:
  - When viewing Prices, it is only possible to delete prices from the form.
  - When viewing Definitions, it is only possible to delete the currently-viewed definition.
  - When viewing the Definition Summary tab: If no definitions are selected, the user is prompted to delete the Master Record. If at least one record is selected, the user is prompted to delete the selection of definitions.
- In Table View:
  - The user is always shown the standard delete dialog.

When an EMC user attempts to delete a Menu Item Master record or a group of Master records, the error message displays all the records that cannot be deleted.

For example, one message reads: *The following records cannot be deleted because they are being used as the Primary Item for one or more Combo Meals. No records have been deleted.* This message does not, however, list the Combo Meal(s) that are associated with the Menu Items. To get a list of the references for an item, click the "References" link on the Menu Item Master Form View page.

Distribution

Main article: Menu Item Distribution

Like other EMC modules, records can be distributed to other properties and Revenue Centers. The Menu Item Maintenance module allows two types of distribution: distributing from one RVC to many, or distributing using multiple RVCs. For more information, see the Menu Item Distribution article.

Other Considerations

Some other points to consider when using Menu Item Maintenance:

- The refresh button is only available in Table View.
- The undo and Audit This Record options are only available in Table View, via the Right-Click Menu.
- Menu Item Maintenance makes a relatively small number of database queries. The following events cause Menu Item Maintenance to make a web service request to the DB for information:
    - When the module opens, the database is queried to retrieve a list of Languages, Major Groups and Family Groups; if the module is opened from the RVC scope, the MI Classes and SLUs are also loaded from the DB.
    - During a refresh, all this information is reloaded from the DB. In addition, the active records are reloaded from the DB.
    - When a user presses the "Search" button, a DB call is made.
    - Each time a new RVC is encountered, a DB call is made. For example, if a user searches for Menu Item Master records, no RVC information is loaded. If the user then toggles to view all the Definitions, a DB call is performed to get information for Definitions in the RVC (a list of MI Classes, Menu Levels, etc.)
- After a user has added records, EMC does *not* make a database request. Instead, the following occurs:
    - If a user adds a new Menu Item Master that falls within the search criteria, the new Master record will exist in the list of records. For instance, if a user searches for items in the Appetizer Family Group, and then adds a new Appetizer record, the item will be displayed in the list. However, if the user adds a new Glass of Wine, it will not be displayed.

- If a user adds a new Menu Item Definition or Price, these new items will display only if the parent item exists. For example, if a user searches for all Soup records, and then adds a definition to a Vodka item, the new definition will not be displayed. New prices are added similarly — if the Menu Item Definition for the price already exists in the search criteria, the new price will be added to the list of items.

Adding a menu item

Adding a Menu Item is a different process than adding records in other EMC modules. In the Menu Item Maintenance module, a user can add Master Records, Definition Records and Price Records. This article discusses how to add a Menu Item Master record with all its definitions and prices at the same time (the dialog is frequently called the Menu Item Wizard); for specific information on adding masters, definitions, and prices individually, see the appropriate article: Adding Menu Item Masters, Adding Menu Item Definitions, Adding Menu Item Prices.

To add a Menu Item, perform the following steps:

1. Open the Menu Item Maintenance module
2. Press the Add Record icon from the toolbar.
   - If Menu Item Maintenance was opened from the Property Scope, the insert dialog defaults to "Add Master Record from Template".
   - If Menu Item Maintenance was opened from the Revenue Center Scope, choose "Add Master Record from Template" from the "Select a task to perform" drop-down.
3. Select the template record by pressing "Select" next to the "Master to Copy" field.
4. After selecting the template record, configure the following fields:
   - The **Name** of the new item
   - The **Record Number** of the item. By default, this field displays the next available record number after the selected record to copy. A user can change the record number; to return the field to its default value, press "Next Record"
   - Select the **Copy Menu Item Names** checkbox to have all of the existing primary and foreign names—including the Long Descriptor(s)—copied from the original Menu Item to the new Menu Item. (This field displays only when "Add Master Record from Template" is selected above.)
   - The **Price(s)** of the item:
     - Configure Prices Individually: For some items, multiple definitions and prices exist. For these items, "Configure Prices Individually" is usually the best option. For example, the image shows "Vanilla Vodka" as a template. This item has multiple definitions and prices.
     - Use the same price for all RVCs: For items that have the same price in every RVC (soda, perhaps), it is easier to enter a single price that applies to all RVCs. This configuration would be used in a situation where a site with many unshared RVCs has standard pricing for certain items. For instance, an amusement park may have 35 Revenue Centers that charge $3.00 for a soda. When adding a "diet soda" item for that site, it is easier for the site to use the "Use the same price for all RVCs" option, instead of entering a price amount 35 times.

- The **RVC(s)** where the item will be created (checkboxes in the grid). Usually, definitions are created in the same RVCs as the template item, so these checkboxes remain checked.

5. Click **OK**. At the prompt "Add this menu item?", click **Yes**.
6. After the item is added, another prompt occurs: *This record was added successfully. Add another menu item?*
   - Yes: The name field becomes empty and the record number updates to the next available record number. At this point, the user is at step #4 of these instructions.
   - No: The dialog closes.

Other Considerations

There are other considerations when using this dialog:

- If the user does not have Employee Role permissions to add Menu Item Master records, the "Add Master Record from Template" option will not appear in the "Select a task to perform" drop-down.
- If one Menu Item Master record is selected in Table View before entering this dialog, the dialog will default to using that record as the "Master to Copy".
- If viewing a Menu Item Master's Definition Summary in Form View, this dialog defaults to the selected Master Record.
- All the fields in the grid are read-only except for the checkbox column and the price column. All other columns are provided for informational purposes only.
- Revenue Centers appear in the grid when these conditions are met:
  - The template Menu Item Master record has a definition in the RVC
  - The user is able to view the RVC, based on RVC-Level Security settings.
  - Menu Item Maintenance was opened from the Property Scope. (If opened from the RVC scope, only the current RVC's definitions will display.)

Best Practices

When creating a new property and adding several items at a time, the ideal method for setting up items is to create a record that belongs to a Major/Family group, then to create all other records in the same Major/Family group using the initial record as a template. For example, when creating appetizers:

1. Set up one Menu Item Master in the Food Major Group and Appetizer Family Group
2. Create all its definitions/prices.
3. Now create the other appetizers based on this definition

With this method, some minor changes will be needed after the definitions are created for the items. Menu Item Classes, for instance, aren't all the same within the same Family Group (some appetizers will print to the Hot Printer while others will not). Even with these minor changes, this method of inserting new menu item records is, by far, the most efficient method possible.

Related Links

Adding an employee

Menu item pricing

This article primarily discusses the per-item configuration of Menu Item Prices. For an overview of Enterprise Pricing, see *Enterprise-Level Menu Item Pricing*.

Understanding menu item fees

In the most basic terms, a **Menu Item Price** is the amount charged for the sale of a Menu Item. In Simphony, Menu Item Prices are configured per Menu Item Definition. Typically, a menu item definition is programmed with one price, however a definition may be programmed with multiple prices (for a small/medium/large soda, for example), or with no price at all (common for condiments).

Configuring menu item fees

Main article: Menu Item Maintenance; specifically, see Navigating Price Records

Menu Item Prices are configured in Menu Item Maintenance. Prices may be edited in bulk by using Table View; they are also displayed in Form View from the Menu Item Definition form. Menu Item Price records contain the following fields:

Number

This field represents the Menu Item Master Record Number. (This field is not configurable.)

Def Sequence #

This field shows the definition sequence number to which this price is attached. (This field is not configurable.)

Definition Name

This field displays the name of the Menu Item Definition to which this price is attached. (This field is not configurable.)

Price Sequence #

This field shows the price sequence number of this price. The price sequence number is the number of the price for this Definition record. Up to eight definitions can exist for a single Definition record. This field is not configurable. Note that if multiple prices exist and one or more prices is deleted, other definitions will be renumbered sequentially starting with 1. For instance, if price 1-6 exist for an item and 2-4 are deleted, price 5 and 6 will become prices 2 and 3, respectively. The price sequence number is important when determining the active price.

Price

This field displays the price of the item. When the item is ordered, this will be the price charged to the customer, unless the Price Group field is configured. See below for more information.

Prep Cost

This field displays the prep cost for the price record.

Tax Class Override

By default, this field is programmed as 0-None, which means that the price will use the Tax Class configured for the Menu Item Class associated with the Menu Item

Definition. To use a different Tax Class for the price, select the appropriate Tax Class from the list.

Active On Level

By default, this field is programmed as 0-All Levels, which means that the price is active for all Menu Levels. This field displays either the Main Levels for the RVC or the Sub Levels, depending on the configuration of the Menu Item Class. See below (Sub Level Pricing vs. Main Level Pricing) for more information.

Options

This field contains two options relating to Fixed Price Meals.

Price Group

If this field is set to 0-None, the price configured in the Price column will be used. To use Enterprise-Level Menu Item Pricing, select the appropriate Price Group from the list. See below for more information.

Adding records

This section discusses adding prices to existing MI Definition records. For information on adding Menu Item Masters, Definitions, and Prices at the same time (Menu Item Wizard), see *Adding a Menu Item*

Typically, Menu Item Prices are added when definition records are added, or when the Menu Item Wizard is used. However, there are times when a programmer may want to add new prices to existing menu item definition records. Some common examples include:

- A restaurant needs to add another price to all its beer items, which will be 50% off the "regular" price during Happy Hour.
- When the definition was initially added, the user forgot to add prices.

In Menu Item Maintenance, two different dialogs exist to add menu item prices, based on the location (Table View or Form View) within Menu Item Maintenance when the Insert button is pressed.

Form view

While viewing a Menu Item Price in Form View, the **Insert Price Record(s)** dialog displays. (There are no other choices for inserting records from this view.) This insert dialog allows the user to add prices to the current definition only. This dialog is very basic; the user is only able to define two fields:

Prices To Add

Select the number of prices to add to the current definition. This drop-down box allows valid choices only; if two definitions currently exist, the drop-down will include choices of 1-6, preventing the user from adding more than 8 prices. ***Note:*** *If 8 prices already exist, this dialog will not open and the user will be presented with an error message: "No more price records can be added for this Menu Item Definition."*

Default Price

Enter the amount that will be charged.

Table view

The **Add Prices to Definitions** dialog is available in Table View. This dialog allows the user to create Menu Item Prices by defining a begin/end range of object numbers, or to select the Menu Item Definitions that will receive the new price record(s).

Select Definition Records

In this section, select the definitions to receive the new prices. This can be done in one of two ways:

- **Selected Records**: If Menu Item Definitions are active in Table View, and at least one Menu Item Definition is selected before accessing the Insert Dialog, this will be the default setting. When this is chosen, the selected definition(s) are displayed. (This is the common method of adding prices to definitions; displayed in the top image on the right.)
- **Select Range**: When this range type is selected, the user must select the RVC where the new prices will be created, the Begin Definition, and the End Definition. This option is used infrequently; it is displayed in the bottom image on the right. ***Note:*** *When Menu Item Maintenance is opened from the RVC Scope, only the current RVC is available in the "RVC for new Price(s)" field.*

Price Creation

In this section, specify how the price records will be created. The choices for this section are:

- **Prices to Add**: Select the number of prices for each Menu Item Definition selected. This insert dialog will ignore requests to create prices greater than sequence number 8; if a definition already has 6 prices and the user chooses to add 3 prices, price #9 will not be created.
- **Price**: Enter the amount that will be charged for the item.
- **Menu Level**: Select the Menu Level on which the new price(s) will be active. Because some definitions may be configured to use Sub Level Pricing and others may be using Main Level Pricing, this field shows the names "Menu Level 1" through "Menu Level 8", instead of the actual names of the levels for the RVC.

Enterprise pricing

Main article: *Enterprise-Level Menu Item Pricing*

The concept of "Enterprise Pricing" exists to allow programmers to configure similar items' prices in one location of EMC. For instance, all "East Coast Domestic Beers" may be $4.00, but "West Coast Domestic Beers" will be $5.00. This type of programming is possible with Simphony's Enterprise-Level Menu Item Pricing functionality. When a Menu Item Price has a Price Group configured, the price of the item is determined by the combination of Price Group (Domestic Beer) and Price Tier (East Coast or West Coast). This functionality is described in more detail in the main article, Enterprise-Level Menu Item Pricing.

Workstation operations

Which price is active?

Multiple prices can be assigned to a single Menu Item Definition. When this is the case, how does the workstation know which price to use? How should a programmer configure the system to achieve the desired result?

The answer to these questions is actually rather simple. When a menu item is ordered, the workstation searches the prices assigned to the definition starting with price sequence #1, then price sequence #2, and so on. The first price that meets the active level is the one that is used.

In the "properly-programmed" example, the item will be 8.00 when ordered on Menu Level 7, but 4.00 when ordered at any other level (because "Level 0" means all levels). The workstation's logic is:

1. The current level of the transaction is level 5.
2. Price #1 for the item is active on Level 7. Continue to the next price.
3. Price #2 for the item is active on Level 0. This represents any level. The item is 4.00.

Price #	Price	Level
1	8.00	7 – Double
2	4.00	0 – All levels

Properly programmed prices and levels

Now imagine the example if the programming were reversed, as shown in the "improperly programmed" example. The workstation's logic is:

1. The current level of the transaction is level 5.
2. Price #1 for the item is active on Level 0; this includes all levels. The item is 4.00.

This works, but what if the item is rung on level 7? The logic is:

1. The current level of the transaction is level 7.
2. Price #1 for the item is active on Level 0; this includes all levels. The item is 4.00.

Therefore, if the "All Levels" price level is used, it should always be the last price sequence number programmed for a definition.

Price #	Price	Level
1	4.00	0 – All levels
2	8.00	7 – Double

Improperly programmed prices and levels

Function keys

638 - Change Price Main Level

This key is used to change all the prices (active on a specified Main Level) entered on a check to different prices; this key applies only to Menu Items using Main Level Pricing. When this key is used, the workstation will prompt the user to select a Main Level. Then, the user will be prompted again for a Main Level. At this point, the workstation will change the price of all menu items using the first Main Level selected to the second Main Level selected.

639 - Change Price Sub Level

This key is used to change all the prices (active on a specified Sub Level) entered on a check to different prices; this key applies only to Menu Items using Sub Level Pricing. When this key is used, the workstation will prompt the user to select a Sub Level. Then, the user will be prompted again for a Sub Level. At this point, the workstation will change the price of all menu items using the first Sub Level selected to the second Sub Level selected.

641 - Menu Item Price Override

When this key is pressed, the user may override the price of the menu item with another price entry. This function key applies the price override to the last item ordered.

644 - Price Inquire

When this key is pressed, the workstation is toggled into Price Inquiry Mode. When the next item is ordered, the workstation will prompt, **`Item is $12.34. Do you want to order this item?`** After answering the question (yes or no), the Price Inquiry mode is reset to OFF.

652 - Weight Price Override

This function key's behavior is discussed on the Weighed Menu Items article.

Function keys 638 and 639 are often programmed as part of macros to change the Menu Level from a one specific level to another, without allowing user intervention.

Other pricing terminology

Sub Level Pricing vs. Main Level Pricing

The terms **Sub Level Pricing** and **Main Level Pricing** are often used to describe which type of Menu Level — Main Level or Sub Level — a Menu Item Price is using. In Menu Item Maintenance, one of the configurable fields for Menu Item Prices is the "Active on Level" field. This is a drop-down field that shows either the Main Levels or the Sub Levels; the type of list depends on the setting of the Menu Item Class option bit #10, **[ON = Use Sub Level Pricing; OFF = Use Main Level Pricing]**.

Fixed Items and Open-Priced Items

Main article: *Open-Priced Menu Items*

All the examples in this article discuss Menu Items with "fixed prices", meaning that an item's price is based on the configuration in EMC (either the Menu Item Maintenance price or the price from Price Assignment, if Enterprise Pricing is in use).

There may be times when a site wants to allow the user to determine the price of the menu item at the time the item is ordered. This type of configuration is called an "Open Price"; for more information on this type of configuration, see Open-Priced Menu Items.

Weighed Items

Main article: *Weighed Menu Item*

A Weighed Menu Item is a menu item that is priced per unit of measurement (pounds or kilograms). The operator is required to enter the weight of the item and the workstation calculates the price. For detailed information, see Weighed Menu Item.

Applying fees to menu items

Understanding menu item fees

You can apply one or more menu item service charge fees (for example, a bottle deposit and a recycling fee) combined as a service charge group to a menu item.

When an operator rings a menu item (for example, Diet Coke) associated with a service charge group, the system adds the menu item fees under the service charge group to the check.

Auditors can track the revenue from specific menu item fees, such as a recycling fee.

Configuring menu item fees

Adding menu item fees to a service charge group

1. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Configuration, and then select **Service Charge Groups**.
2. Select the service charge group record, or add a new service charge group using the insert record button.
3. Add or remove service charges to be included with this service charge group.

Assigning a service charge group to a menu item class

1. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Configuration, and then select **Menu Item Classes**.
2. Select the menu item class record.
3. On the General tab select the Service Charge Group from the drop-down list to apply to the menu item class record.

Privileges for voiding fees

To void fees from a check or to authorize another operator to do the same:

1. In the EMC, select Enterprise, select Configuration, select Roles, and then select the **Operations** tab.
2. Select the **Authorize/Perform Void of Fees** option.

Displaying or hiding menu item fees

To add the **[Display/Hide Menu Item Fees]** function key:

1. In the EMC, select the Configuration tab, and then select **Page Design**.
2. Add the **[Display/Hide Menu Item Fees]** function key.

To show or hide menu item fees:

1. In Ops, toggle the **[Display/Hide Menu Item Fees]** function key.

Related Links

Service Charges

How menu items print

When a check is service totalled, users expect that menu items will print at the appropriate printers (or display on the appropriate KDS Displays). But someone new to MICROS products may not understand *why* or *how* that happens. This article explains **how menu items print**, so that users can always have the correct configuration. At the very least, this page can be used to troubleshoot printing problems and to verify configuration.

Example

- A printer is configured: **Hot Food Printer**.
- The menu item, **Chicken Wings**, needs to be printed
- This is RVC #1.

EMC Configuration

Menu Item Class

The first step is somewhat obvious... is the Menu Item Class programmed to print? Troubleshooting:

1. Enter Menu Item Maintenance
2. Select your menu item. This could be easily done by searching for Appetizers. (This is the logical location for **Chicken Wings**.)
3. Once the definition is selected, look at the Menu Item Class. Does it appear to be right? Let's see...
4. Click the link button next to the Menu Item Class field.
5. Now you're looking at that item's Menu Item Class. Click on the **Output** tab.
6. Which order devices are checked? Any? Let's make sure that it will output to order device #1. (More of an explanation later.)

Order Devices

Now that you've saved changes in the Menu Item Class, open the "Order Devices" module from the EMC.

1. This module starts in Table View. Double click order device #1 to enter Form View.
    - Order Device #1 is what was selected in the Menu Item Class section of this page.
2. On this page, these are the fields that are important:
    - Device Type

      Set this to "Remote". (More discussion on the Order Device page about Local/Remote; but for this example we're only using "Remote")
    - Device

      Set this to the **Hot Food Printer** that was previously mentioned

      Note: If this field is set to 0-None, no printing will take place.

- Order Device Redirect

  Because this is printer #1, set this field to printer #1, or click the "Set to Device 1" link. (More discussion on the Order Device Redirection page about this setting)

  Note: If this field is set to 0-No Output, no printing will take place.

Workstations

We've set up:

1. A menu item that prints to order device #1.
2. An order device that says order device #1 is your **Hot Food Printer**.

At this point, your **Chicken Wings** should print to your **Hot Food Printer**, right? Not quite. Open the EMC Workstations Module.

1. Select your workstation.
2. On the Order Devices tab enable order device #1.

Summary

To print a Menu Item:

1. Verify that your menu item is in a class that prints to your order device.
2. Verify that your order device is redirected to itself and that it has the appropriate physical printer or KDS Display listed for the "Device" field.
3. Verify that your workstation is set to print to your order device.

Menu item availability

In Simphony, it is possible to control **Menu Item Availability**, meaning that an item can be programmed to have a specific quantity available (when a chef has prepared a pre-set number of specials, for instance), or to make the item "86'd", which means that it is unavailable for ordering at all (if the kitchen ran out of an item). Starting with Simphony 2.0, Menu Item Availability is configured in its own EMC module.

Overview

Simphony workstations display graphics on menu item SLU keys to show the availability or count remaining. When a user has checked the "Out of Item" option, an "X" graphic displays over the item's corresponding touchscreen key, as seen for the **[MAC & CHEESE]** key. If an item has a limited quantity remaining, the item count can be displayed in the upper-right corner of the touchscreen key, as seen below on the **[FRIES]** key. Note that if the count of an item reaches 0, the item count "0" will display in the upper right and the "X" graphic will display on the key. (This is not displayed in the image.)

In this example, when the count of the **[FRIES]** item reaches zero, users will receive the **`No more FRIES remaining`** message if they attempt to order it; see the Workstation Messages prompt for more information.

2.x Configuration

Starting with Simphony 2.0, Menu Item Availability is programmed in the **Menu Item Availability** EMC module, which is located on the Property Scope or RVC Scope of EMC. This module became necessary with the introduction of zoneability; while the configuration of a menu item can be performed at the Enterprise or other locations outside the traditional programming scope, its count and availability should be configured only within a Property. For example, a seafood restaurant chain using Simphony may have a Menu Item named "Maine lobster" configured at the Enterprise. Clearly it would be irrational to include the number of available lobsters with the Menu Item record that exists on the enterprise, because a lobster ordered in the New York City store does not affect an operator's ability to order a lobster in Chicago. Because of this, the Menu Item Availability module was introduced to allow the configuration of the "Count" and "Out of Item" status within a Property.

Module Overview

When the Menu Item Availability module is opened, the list box on the left displays the Property, the RVC Groups for the Property, and all RVCs in the Property. (If this module is opened from a RVC, only the current RVC is displayed.)

The module displays the standard Table View Filtering control that is used in other modules, and a grid that lists all Menu Item Masters in the current Property. The grid displays the following columns:

#

This column displays the Object Number of the Menu Item Master record.

Master Name

This column displays the Name of the Menu Item Master record.

Menu Item Status

This column displays the status of the item. The choices are **[1 - Always Available]** or **[2 - Use Availability Settings]**.

Count

This column is available only when the Menu Item Status is configured for **[Use Availability Settings]**. In this field, a programmer enters the remaining quantity of the item.

Out of Item

This column is available only when the Menu Item Status is configured for **[Use Availability Settings]**. When this field is checked, the selected item is unavailable for ordering. Note that when this field is checked, the setting in the "Count" field for the item is not relevant; the item will not be orderable in workstation operations.

Sample configurations

In the simplest case, one Property contains only a single kitchen, so a user would have no need to select anything other than the first entry in the list box on the left (the Property). Not all properties contain only one kitchen, however, so this module allows the configuration of Menu Item Status settings for individual RVCs or RVC Groups. In the example image, the following RVCs are configured:

- 3 - Casino Bar
- 4 - Lounge Bar
- 5 - Slot Room
- 201 - Steak House
- 202 - Blackjack's
- 304 - Sports Bar

The purpose of a Revenue Center Group is to allow multiple RVCs to use the same "kitchen", for purposes of MI Availability.

In addition, there is one RVC Group configured, and it contains the Casino Bar and Slot Room RVCs. Given this configuration, a user can select the appropriate location to configure the availability of an item. Some examples:

Business Example	A programmer would...
"Steak House" has only 15 NY Strips left.	... select "RVC 201 - Steak House" and set the NY Strip's status to **[Use Availability Settings]**, and then configure the count to 15.
"Lounge Bar" has no Swordfish left.	... select "RVC 4 - Lounge Bar" and set the Swordfish's status to **[Use Availability Settings]** and then check the **[Out of Item]** field.
The kitchen that serves both the Casino Bar and Slot Room (RVC Group 1, Casino Bar/Slot Room) has only four Salmon dinners left.	... select this RVC Group and set the status to **[Use Availability Settings]**, and then configure the count to 4.
All bottles of wine at the Property are handled from a central location delivered by a sommelier. (This is quite possible for a small casino with only six RVCs.) The seasonal specialty wine has a total of 144 bottles available.	... select "Las Vegas" and configure the bottle of wine with a count of 144.

Configuration Validity

All the configurations above are allowed at the same time, because each configuration has been performed independently from other items. For example, the NY Strip item at the Steakhouse cannot conflict with a NY Strip item in another RVC. However, if a programmer attempted to configure the following...

- 15 NY Strips in the Steakhouse
- 20 NY Strips for the Property

... an error would occur. There is no way have an item configured with two availability settings if the two locations overlap. Therefore, when a Menu Item at the same Object Number is configured for two different selections in the list box, EMC will prevent these configurations:

1. When a Property and a RVC are programmed to control an item's availability, this is not allowed.
2. When a Property and a RVC Group are programmed to control an item's availability, this is not allowed.
3. When a RVC Group and a RVC that belongs to that group are a programmed to control an item's availability, this is not allowed.
4. When two RVC Groups are programmed to control an item's availability, and at least one RVC belongs to both groups, this is not allowed.

In addition to the error checking performed in the Menu Item Availability module, EMC prevents a user from saving a RVC or RVC Group if their configuration has changed, and that configuration would cause invalid Menu Item Availability settings.

Module Permissions

When the module is opened from the Property Scope, EMC determines which items appear in the list box on the left.

The following determinations are made when considering the locations that appear in the list box:

- The Property is always added.
- RVC Groups from the Property are added when:
  - There are no RVCs in the RVC Group (an odd configuration!), or
  - The logged-in user has permissions to view MI Availability for every RVC in the RVC Group.
- RVCs from the Property are added when the logged-in user has permissions to view MI Availability for the RVC.

The ability to edit records is determined by the following:

- Edits to MI Availability for the Property can be made if the logged-in user has permissions to edit MI Availability from the Property.
- Edits to MI Availability for RVC Groups can be made when:
  - The logged-in user has permissions to edit MI Availability for the Property, or
  - There are no RVCs in the RVC Group (an odd configuration!), or
  - The logged-in user has permissions to edit MI Availability for every RVC in the RVC Group.
- Edits to MI Availability for a RVC can be made if the logged-in user has permissions to edit MI Availability for the RVC.

Menu item definition

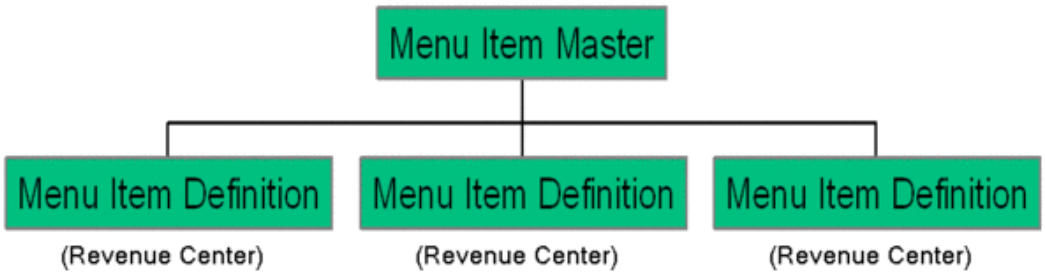
A **Menu Item Definition** record is a revenue center-level menu item record; menu item definitions define how Menu Item Master records act, including behavior such as the SLU where the item appears, the Menu Level(s) where the item is active, and the name of the item that will display on touchscreens and order devices.

Understanding menu item hierarchy

When Menu Item Definitions are created, they are linked to a Menu Item Master record. A Menu Item Master record without any definitions is a record that cannot be ordered!

Consider the hierarchy diagram, and assume the Menu Item Master record is "Shrimp Cocktail." Without the definition records, there would be no way to perform a sale of "Shrimp Cocktail." Also, note that it is possible for multiple definitions to exist in a single Revenue Center, allowing different behavior of the same Menu Item Master record. Multiple definitions are often programmed for liquor items, where a liquor item may be a condiment item in one scenario but a "regular" item in another scenario. ***Note:*** *While EMC allows 64 definition in a single RVC, it is rare that a site uses more than five or six definitions. Typically, most items have one definition per RVC.*

The Menu Item Hierarchy is represented in Menu Item Maintenance. When viewing Menu Item Definition records in Form View, the Menu Item Master record to which the Definition belongs is always displayed. In addition, the "Definition Summary" view shows all definitions that exist for a single Master record.



Configuring menu item definitions

Main article: *Menu Item Maintenance*; specifically, see *Navigating Definition Records*

Menu Item Masters, Definitions, and Prices are all configured in the Menu Item Maintenance module. Menu Item Definition Records contain the following fields:

Number

This field represents the Menu Item Master Record Number. (This field is not configurable.)

Def Sequence #

This field shows the definition sequence number of this definition. The definition sequence number is the number of the definition in this RVC for this Master record. Up to 64 definitions can exist in a single RVC for a single Master record. (This field is not configurable.) Note that if multiple definitions exist and one or more definitions is deleted, other definitions will be renumbered sequentially starting with 1. For instance, if definitions 1-6 exist for an item and 2-4 are deleted, definitions 5 and 6 will become definitions 2 and 3, respectively.

First Name

The name of this menu item definition. This name appears on the workstation's check detail area and on KDS displays, guest checks, customer receipts, and remote printers.

Second Name

The second name is an alternate name for this menu item. This second name will print on the Touchscreen Keys and/or the Remote Printers, depending on the settings of the Menu Item Class option bits, **[Print Name 2 on Order Output instead of Name 1]** (option 18) and **[Use Name 2 on Touchscreens instead of Name 1]** (option 19). This field is often used to abbreviate the text that shows on the Touchscreen Buttons and Order Output — because only 12 characters print to the Order Devices, but 16 are allowed as the Definition Name, it is often helpful to put abbreviations in the Second Name field, and to enable the "Print Name 2 on Order Output instead of Name 1". Also, the Second Name field can be used when the Order Devices option bit to "Print Both Menu Item Names" is enabled. "Print Both Menu Item Names" is often used for a remote Wine Printer. This way, it is possible to have the First Name of the wine print the name, while the second name represents the Bin number and type of wine. If this field is blank, the first name is used by default.

Third Name

The Third Name for a definition is used for search operations when the **[Order Menu Item By Name 3]** function key (678) is used.

Long Descriptor

When this field is not blank, this descriptor will print on Guest Checks and Customer Receipts, below the Menu Item and its price.

Menu Item Class

The Menu Item Class to which this menu item definition belongs.

KDS Minutes

The number of minutes necessary to prepare this item. This field is used when a Revenue Center is using KDS Menu Item Timing.

KDS Seconds

The number of seconds necessary to prepare this item. This field is used when a Revenue Center is using KDS Menu Item Timing.

KDS Negative/Positive

"Positive" is the default setting. Select this radio button for most menu items (most menu items have a positive prep time). Select "Negative" if this item has a negative prep time. A negative prep time is typically used for condiments that may alter the time of an item to be prepared. For instance, if a Prime Rib has a default prep time of 5 minutes, perhaps the menu item "Rare" has a prep time of negative 2 minutes. When ordered together, the Rare Prime Rib has a total prep time of 3 minutes.

SLU

The SLU key to which this Menu Item Definition belongs. When the user presses a SLU button on the workstation, all menu items belonging to that SLU will appear. Note that as a practical limit, no more than 1,024 menu items should be linked to a single SLU.

Mobile MICROS SLU

The SLU key to which this Menu Item Definition belongs, for Mobile MICROS devices.

SLU Sort Priority

In this field, a number may be programmed to prioritize the sorting order of the SLU. This field is used when the Touchscreen Style option, **[Sort Screen Using Menu Item Sort Priorities]** is enabled. Entry format is 0-99, where "1" items show on the screen first, followed by "2" items, then "3" items, up to 99, then "0" items.

Icon

To assign an Icon to this Menu Item as it appears on SLU screens, make an appropriate selection from the drop-down list. Note that icons could slow performance of a workstation.

NLU Group

The number of the NLU Group, if any, to which this menu item belongs.

The NLU fields are sometimes used in Barcode Ordering configurations.

NLU Number

A unique NLU number for this menu item, if it is to be ordered via NLU. Up to 12 digits are allowed.

Surcharge

Any applicable surcharge for this menu item, if Florida Surcharge is enabled.

Tare Weight

The tare weight of the empty package for an item that is sold by weight (e.g., the weight of the salad container at a salad bar, where salad is sold by weight).

Menu Level Link and Sub Level Link

The Main/Sub levels on which this definition is active. In most cases, all levels are enabled for every definition, but this varies based on programming needs. The links below the box let the user easily set/unset all the options.

The Availability/Out of Item Properties fields are available for Definition #1 only. For more information about the Availability/Out of Item Properties, see Menu Item Availability.

Out of Menu Item

If this box is checked, operators are prevented from ordering this item. If this option is selected, the users will receive the workstation error message, **`Out of Menu Item`**. This prevents the user from trying to order an item that the kitchen will

be unable to prepare, so that the server can immediately return to the customer for an alternate selection.

Check Menu Item Availability

If this option is checked, the system will use the "Count Available" field to determine how many items are left.

Count Available

This field displays the number of menu items that are available, if the **[Check Menu Item Availability]** option is enabled. This number decrements each time the item is ordered, and the number of remaining items shows on the Menu Item SLU button. This field is often used for Daily Specials. For instance, a chef may have only 20 Maine Lobsters available for this evening's menu. After 20 Lobsters have been ordered, the workstation will prompt the servers, **`No more Maine Lobsters remaining`**.

Menu Item Master Fields

To give users a better understanding of the Master/Definition relationship, the Menu Item Master fields are always displayed on the menu item definition form. If a user does not have privileges to edit the Menu Item Master fields, the fields will be disabled.

Adding Records

This section discusses adding definitions to existing MI Master records. For information on adding Menu Item Masters, Definitions, and Prices at the same time (Menu Item Wizard), see *Adding a Menu Item*

Typically, Menu Item Definition records are added when master records are added. However, there are times when a programmer may want to add new definitions to existing menu item master records. Some common examples include:

- A restaurant needs to add another definition to all its beer items, which will print to a different printer during Happy Hour.
- No definitions exist in RVC 1 for an item, but definitions exist in RVC 2.

In Menu Item Maintenance, three different dialogs exist to add menu item definitions, based on the location within Menu Item Maintenance when the Insert button is pressed.

Add Definitions to Masters

The **Add Definitions to Masters** dialog is available from Table View only. This dialog gives the user a variety of methods for adding definition records, including selections of the master items to receive definitions, the RVC(s) where definitions will be created, default settings for the new definition(s), and the method for creating prices.

Select Master Records

In this section, select the Menu Item Master records that will receive the new definitions.

- **Selected Records**: This is the default setting when this dialog is opened from Table View and more than one Menu Item Master record is selected. When this view is chosen (as shown in the example image), the list of selected Master Records is displayed.
- **Record Number or Range**: When this Range Type is selected, the programmer can enter individual record numbers and/or ranges, using the same format as the standard insert dialog.
- **Select Range**: When this Range Type is selected, the programmer can select a numeric range of Menu Item Master records to receive definitions. With this range

type, the user selects the begin/end items. This choice is used when the Menu Item Master records that will receive definitions are arranged sequentially. This Range Type is used infrequently; however in older products, this was the only method for adding Menu Item Definitions.

Select RVCs

In this section, select the RVCs where the definitions will be created, and select the number of definitions per RVC that will be created. When Menu Item Maintenance is opened from the RVC Scope, only the current RVC will be displayed, and it is checked by default.

Definition Default Settings

In this section, select the method for creating the new definitions.

- **Use Template**: Typically, this checkbox is checked. By checking this box, the "Template Definition" field becomes enabled.
- **RVC of Template/Class**: To select a Menu Item Class or Template Definition, this field must be selected first. When Menu Item Maintenance is opened from the RVC Scope, this field is locked at the current RVC.
- **Template Definition**: If "Use Template" is checked, select a definition that will be used as the template for the new definition(s) that are being created.
- **Menu Item Class**: If "Use Template" is not checked, this field is enabled, allowing a Menu Item Class to be assigned to the new menu item definition(s). Typically, new definitions are created using templates, so this field is not frequently used.

Price Creation

In this section, specify how price records will be created when the definition(s) are created. Choices for this section are:

- **Do Not Create Prices**: When this option is used, no price records are created.
- **Inherit Prices from Template**: This method is used frequently. If the new definition(s) are being created based on a template record, choose this option to use the template definition's prices as the prices for each new definition.
- **Specify Prices**: When this option is selected, the "Number of Price Records" and "Price" fields become enabled. Typically, this option is used when the new definitions will have one price record each.

Add Definitions to this Master

When viewing a Menu Item Master's Definition Summary, the insert dialog defaults to the **Add Definition Records to this Master** task. This dialog is similar to the Add Definitions to Masters Dialog, except that it simplifies the choices because only one Menu Item Master record can be affected. In this dialog, the following fields can be configured:

RVCs for new Definition(s)
: Select the RVCs where the definitions will be created

Definitions to Add
: Select the number of definitions per RVC that will be created.

Use Template

Choose a template definition, or select No Template. This field displays definitions that appear in the Definition Summary grid.

Insert Price Records

Choose this checkbox to create Menu Item Prices for the new definitions.

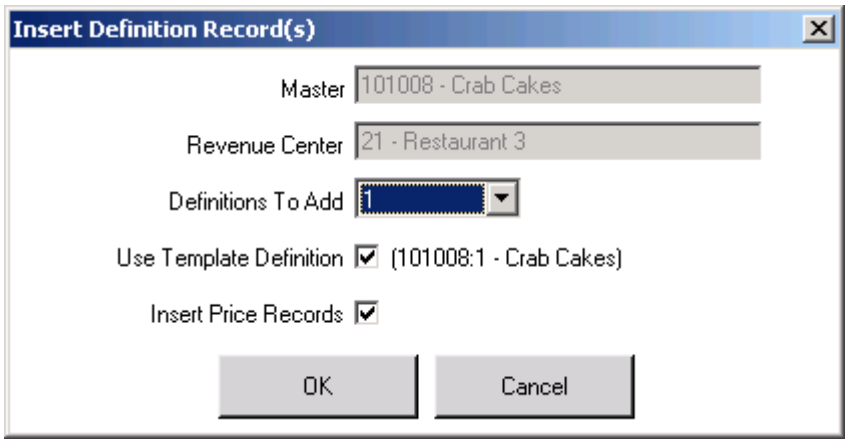
Number of Price Records

If "Insert Price Records" is checked and "Use Template" is set to "No Template", select the number of prices to be added to each definition.

Price

If "Insert Price Records" is checked and "Use Template" is set to "No Template", enter the price. Typically, this option is used when the new definitions will have one price record each.

Insert Definition Record(s)



The **Insert Definition Record(s)** dialog from Menu Item Maintenance. This dialog appears when Insert is pressed while viewing a definition in form view.

When viewing a Menu Item Definition in Form View, the **Insert Definition Record(s)** dialog displays. (There are no other choices for inserting records from this view.) This dialog is similar to the Add Definitions to this Master dialog, except that it simplifies the choices to the following:

Definitions to Add

Select the number of definitions to add.

Use Template Definition

By default, this box is checked. There is not a choice of definitions to be used as a template; the definition being viewed in Form View will be used as the template.

Insert Price Records

Choose this option to create prices when the definition is created. This option can be checked only when "Use Template Definition" is selected.

Menu item distribution

Menu Item Distribution is the method of distributing menu item records in the Menu Item Maintenance module. Because the Menu Item Maintenance module allows the configuration of multiple record types (Menu Item Masters, Menu Item Definitions, and Menu Item Prices), the Menu Item Distribution dialogs differ from the dialogs that appear in other modules.

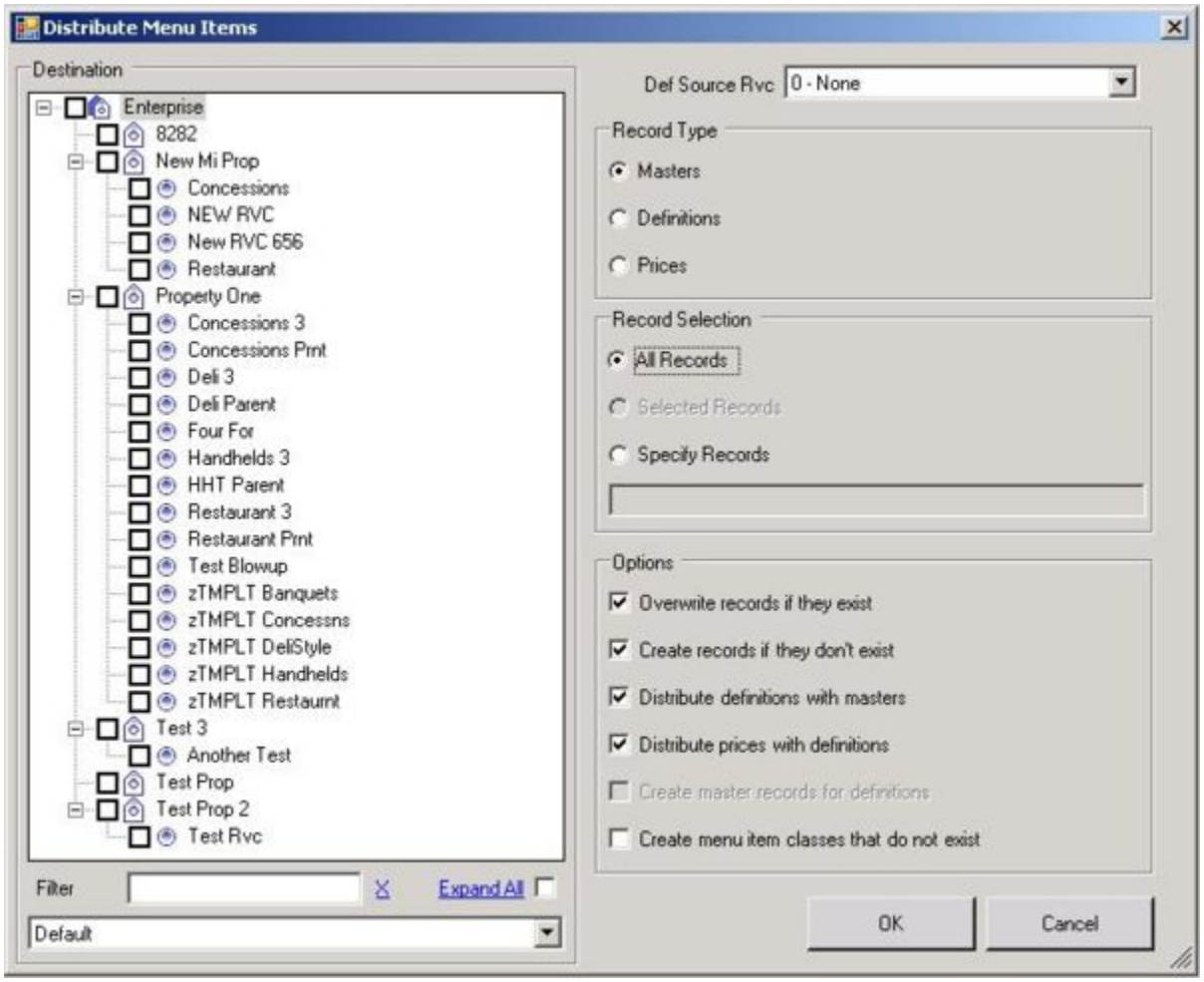
Opening the Distribute Dialog

When Menu Item Maintenance is opened from the Property Scope, the **Select Distribute Type** dialog prompts the user for the type of distribution.

In EMC, Menu Item Distribution occurs once the Menu Item Maintenance module has been opened:

1. Select "Distribute" from the Edit Menu.
2. Two possibilities:
    - If Menu Item Maintenance was opened from the Property Scope, the user will be prompted for the distribution type.
    - If Menu Item Maintenance was opened from the RVC Scope, the user will be taken directly to the Revenue Center Distribution dialog.

Revenue Center Distribution



The Revenue Center distribution dialog. This dialog allows the user to copy information from one RVC to another. In addition, a user can copy Menu Item Master records to other properties while copying all definitions/prices, using template definitions/prices from a single RVC.

The Revenue Center Distribution dialog displays when a user selects "Distribute from One RVC to Many", or when MI Maintenance is opened from the RVC Scope. This option is typically used when distributing Menu Item Definitions and Prices within a single property. With this option, one RVC's definitions/prices can be distributed to multiple RVCs.

Dialog Overview

This dialog consists of the Selection Hierarchy panel that allows the user to determine the destination Properties and Revenue Centers for distribution. The configuration section offers several options to determine exactly what records should be distributed and created. Note that some values are selected by default,

based on the selections in Table View prior to opening the dialog. The following fields are configurable:

Def Source RVC
: This field defaults to the RVC of the Definitions or Prices being viewed in Table View, or it defaults to 0-None if Menu Item Master records are being viewed.

Record Type
: This box defaults to the value that is currently being viewed in Table View.

Record Selection
: If records are selected in Table View, this box defaults to "Selected Records". Otherwise, the default is All Records.

Options
: Most of the options are enabled/disabled based on the type of record that is selected. The options are:

- **Overwrite records if they exist**: Enable this option to overwrite existing records in the destination RVC or Property. If this option is not enabled, existing records will remain unchanged.
- **Create records if they don't exist**: Enable this option to create new records in the destination RVC or Property. If this option is not enabled, new records will not be created.
- **Distribute definitions with masters**: Select this option to distribute Menu Item Definition records with Menu Item Master records. When this option is selected, a source RVC must be specified. This option is only available when distributing Menu Item Master records.
- **Distribute prices with definitions**: Select this option to distribute Menu Item Price records with Menu Item Definition records. This option is typically enabled; it is only available when distributing definition records.
- **Create master records for definitions**: This option is used when moving definitions from a Revenue Center in one property to a Revenue Center in another property. When this is enabled, Menu Item Master records in the destination property will be created for definitions if they do not exist. If this option is disabled and there is no Master Record with the same object number, the definition record will not be created in the destination RVC, because there is no destination Master Record to be associated with the definition. Additionally, if Major Groups and Family Groups in the new property do not exist for the Master Record, they will be created.
- **Create menu item classes that do not exist**: Select this option to create Menu Item Classes in the new RVC(s) if they do not exist. For instance, if the source RVC has a definition with class #77, and

the destination RVC does not include class #77, the class will be created in the destination RVC.

Distributing Master Records

This dialog can be used to distribute Master Records from one property to another. When distributing Master Records, it is also possible to distribute definitions and prices. To distribute Master Records, perform the following steps:

1. Set the Record Type to "Masters"
2. Choose the appropriate Record Selection type
3. Select these options as appropriate:
    - Overwrite records if they exist
    - Create records if they don't exist
4. If definitions will be distributed, perform the following:
    - Choose the "Def Source RVC"
    - Select "Distribute definitions with masters"
    - If appropriate, select "Distribute Prices with definitions"
    - If appropriate, select "Create menu item classes that do not exist"

If distributing Masters and Defs from one Property/RVC to another Property/RVC, it may be best to use the Property Distribution distribution type.

Finally, select the destination Properties and/or RVCs. Note that selecting the Destination Property in the Selection Hierarchy Panel causes all RVCs belonging to the Property to be checked automatically. This may not be desirable behavior, depending on the type of distributing that needs to occur. For instance, consider the following scenario:

- Destination Property has 45 RVCs
- The user is trying to distribute Masters to Destination Property A, and defs into RVCs 41 and 42 of that property.
- When the user selects Property A, all 45 RVCs become selected. It is then necessary to *uncheck* all but RVCs 41 and 42. Because of this, it may be better to use the Property Distribution dialog.

Distributing Definition Records

When distributing Menu Item Definitions with "Selected Records" as the range type, all Definitions for a particular object number will be copied, even if all definitions are not selected. For example, if you are distributing

This dialog can be used to distribute Definition Records from one RVC to another, either within the same property or to other properties. When distributing Definition Records, it is also possible to distribute prices. To distribute Definition Records, perform the following steps:

object number 1234, definition sequence #2, all definitions for object number 1234 will be copied, not just sequence #2.

1. Set the Record Type to "Definitions"
2. Choose the appropriate Record Selection type
3. Select these options as appropriate:
    - Overwrite records if they exist
    - Create records if they don't exist
4. Choose the "Def Source RVC"
5. If appropriate, select "Distribute Prices with definitions"
6. If appropriate, select "Create menu item classes that do not exist"
7. If distributing from a Revenue Center in one property to a Revenue Center in another property, it may be appropriate to select the "Create master records for definitions" option
8. Finally, select the destination Revenue Centers.

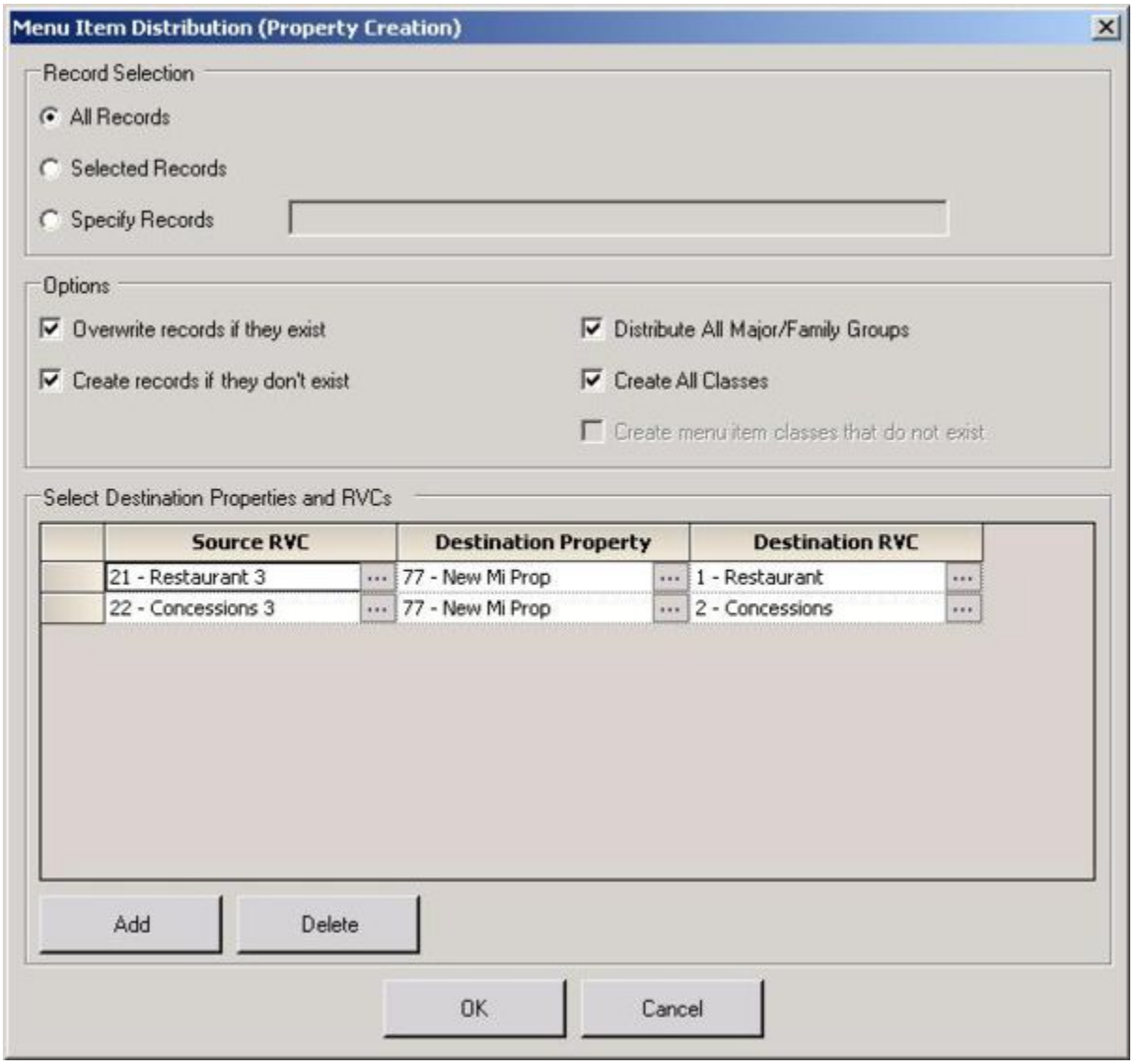
Distributing Price Records

This dialog can be used to distribute Price Records from one RVC to another, either within the same property or to other properties. To distribute Price Records, perform the following steps:

When distributing Menu Item Prices with "Selected Records" as the range type, all Prices for a particular object number will be copied, even if all prices are not selected. For example, if you are distributing object number 1234, definition #1, price sequence #2, all price for object number 1234 will be copied, not just definition #1 and sequence #2.

1. Set the Record Type to "Prices"
2. Choose the appropriate Record Selection type
3. Select these options as appropriate:
    - Overwrite records if they exist
    - Create records if they don't exist
4. Choose the "Def Source RVC"
5. Finally, select the destination Revenue Centers.

Property Distribution



The Property Distribution dialog. This dialog allows the user to copy entire properties to other properties. With this dialog, the user specifies multiple source RVCs and multiple destination RVCs.

The Property Distribution dialog displays when a user selects "Distribute using Multiple RVCs as Templates (new property creation)". This option is used when copying Master records from one property to another, while specifying multiple source and destination RVCs.

In the example image, the user is copying menu items into "New Mi Prop". In that property, the "Restaurant" RVC will get its definitions and prices from the source property's "Restaurant 3" RVC and the "Concessions" RVC will get its definitions and prices from the source property's "Concessions 3" RVC.

Dialog Overview

This dialog consists of some of the same options used in the RVC Dialog, but the main difference is that this dialog does not contain the Selection Hierarchy panel. Instead, this dialog includes a grid that allows the user to map the source/destination RVCs. The following fields are configurable:

Record Selection
: Choose from All Records, Selected Records, or Specify Records.

Options
: Most of the options are enabled/disabled based on the type of record that is selected. The options are:

- **Overwrite records if they exist**: Enable this option to overwrite existing records in the destination RVC or Property. If this option is not enabled, existing records will remain unchanged.
- **Create records if they don't exist**: Enable this option to create new records in the destination RVC or Property. If this option is not enabled, new records will not be created.
- **Distribute All Major/Family Groups**: Select this option to distribute all Major Groups and Family Groups from the Source Property to each Destination Property before distributing Master Records. If this option is not selected, Major Groups and Family Groups will not be created in the new property if they do not already exist; therefore, it may be possible to have Menu Item Master records with "0" Major and/or Family Groups. It is recommended that this option is enabled. Typically, this Distribution Dialog is used for complete property creation; therefore, it is usually desirable that the Major/Family Groups are created first.
- **Create All Classes**: Select this option to distribute all Menu Item Classes from the Source RVC to the Destination RVC before distributing Menu Item Definition Records. Typically, this Distribution Dialog is used for complete property creation; therefore it is usually desirable that all the Menu Item Classes are created in each Revenue Center first.
- **Create menu item classes that do not exist**: Select this option to create Menu Item Classes in the new RVC(s) if they do not exist. For instance, if the source RVC has a definition with class #77, and the destination RVC does not include class #77, the class will be created in the destination RVC.

Add/Delete Buttons
: These buttons allow the user to add new rows to the grid and to remove unwanted rows. Each row contains the Source RVC (from the current property), the Destination Property, and the Destination RVC. The

example image shows a typical configuration where all the destination RVCs are in the same property, but it is also possible to distribute to RVCs in multiple properties at the same time.

Distributing

To distribute, perform the following steps:

1. Choose the appropriate Record Selection type
2. Select the appropriate options
3. Add source and destination RVC(s).

Because this dialog is designed for property creation, the options "Distribute All Major/Family Groups" and "Create All Classes" are usually checked.

Menu Item Class

Understanding menu item classes

A menu item class consists of a set of options that apply to similar menu items in a revenue center. A menu item class specifies important information, including:

- The tax class associated with the menu items
- Whether or not the item is a condiment
- The behavior of menu levels after ordering an item
- The order devices to which the items print

Configuring similar menu items into a class is easier than individually setting each menu item's order device output or condiment settings. Consider this example:

The menu items Coke, Diet Coke, Sprite and Root Beer probably all behave the same way — they are taxed the same, they do not require condiments, and all print to the same order device(s). Because of this, it is easier to have just one menu item class called *Soda* and make all soda menu items a part of this class.

Related links

Condiments

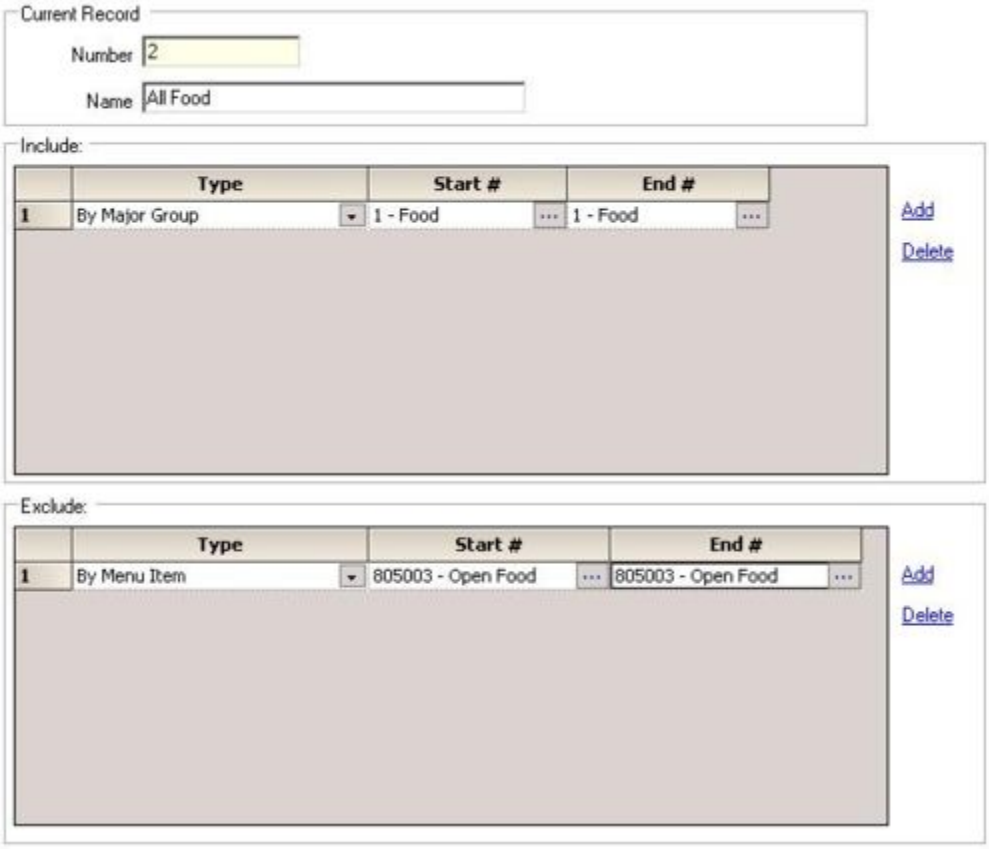
Seat Handling

Menu Item Group

Understanding menu item groups

A menu item group is a user-defined group of menu items that is used to calculate discounts. Within the Menu Item Group module, you can assign menu items based on major groups, family groups, or by menu item object number or range.

Configuring menu item groups



Form View in the Menu Item Groups module.

In the example image, a menu item group is named All Food. For this configuration, the programmer elected to use the Food major group to represent all foods. In the Exclude field, this group is configured to exclude Open Food. This is a typical configuration for All Food — the programmer does not want open food items to be in the group for discounting, but all other food items are discountable.

Using menu item groups with discounts

Automatic discounts are configured with a menu item group to determine which item(s) enable discount rules and which items are discountable. In addition to automatic discounts, manual discounts can also be configured to use menu item groups. While the legacy method of Itemizers is still valid, MICROS recommends that discounts use menu item groups. This method of discounting often allows more flexibility and easier understanding.

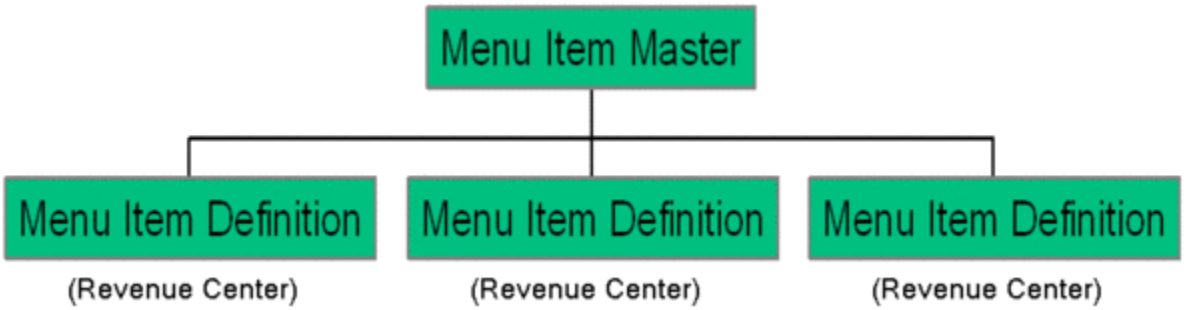
Related links

Automatic Discounts

Menu Item Master

A **Menu Item Master** record is a property-level menu item record. This record is the top of the Menu Item Hierarchy and its primary purpose is to display on reports.

Menu Item Hierarchy



This diagram shows the relationship between Menu Item Masters and Menu Item Definitions.

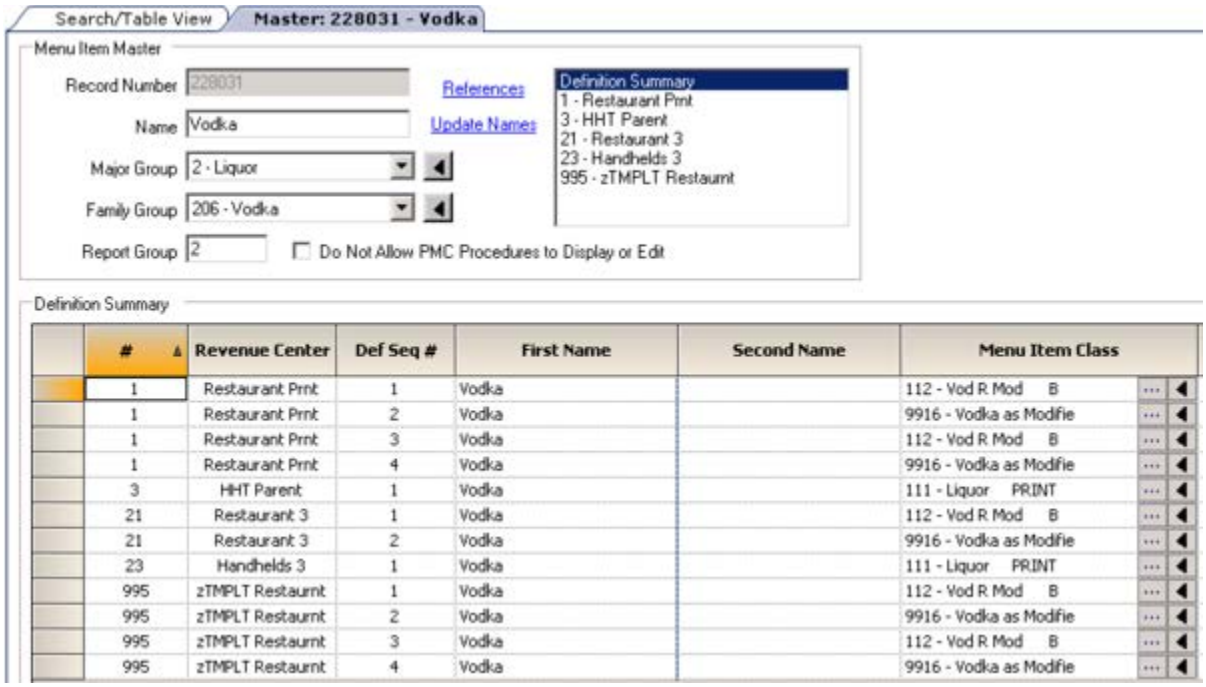
Menu Item Definitions are the records that are can be ordered; menu item definitions appear on touchscreens and print on order chits, guest checks, and customer receipts. Menu Item Definition records are created in Revenue Centers, and they *define* how a Menu Item Master record acts.

Consider the hierarchy diagram, and assume the Menu Item Master record is "Shrimp Cocktail." When the menu item definitions are ordered, the sale count of the Menu Item Master increases. This is the purpose of the Menu Item Master record — only one instance of the item "Shrimp Cocktail" needs to exist in a property, but the multiple Menu Item Definition records allow different behavior of this Master record. (For instance, in one RVC, Shrimp Cocktail may be $6.00, but it may be $9.00 in another Revenue Center. In addition, it is likely that the Menu Item Definitions in one RVC print to different printers in another RVC.)

The Menu Item Hierarchy is represented in Menu Item Maintenance by showing all Menu Item Definitions that are attached to a single Menu Item Master. The image that describes this is shown below.

EMC Configuration

Main article: Menu Item Maintenance; specifically, see Navigating Master Records



Form view for a Menu Item Master Record. This view is called the "Definition Summary" view; the Menu Item Master configurable fields are at the top of the form, then all Menu Item Definitions display below. This view allows users to see all definitions associated with a single master record.

Menu Item Masters, Definitions, and Prices are all configured in the Menu Item Maintenance module. Menu Item Master records contain the following configurable fields:

- The Name of the item
- The Number of the item
- The Report Group of the item
- The Major Group of the item
- The Family Group of the item

In addition, the **[Do Not Allow PMC Procedures to Display or Edit]** option bit controls the following: Select this option to prevent this menu item from displaying or being edited in the PMC. This option prevents configuration changes to be made to all definitions of this item. This option does not affect the ability to configure Menu Item Availability through Menu Item Availability PMC Procedure; MI Availability can always be edited in PMC.

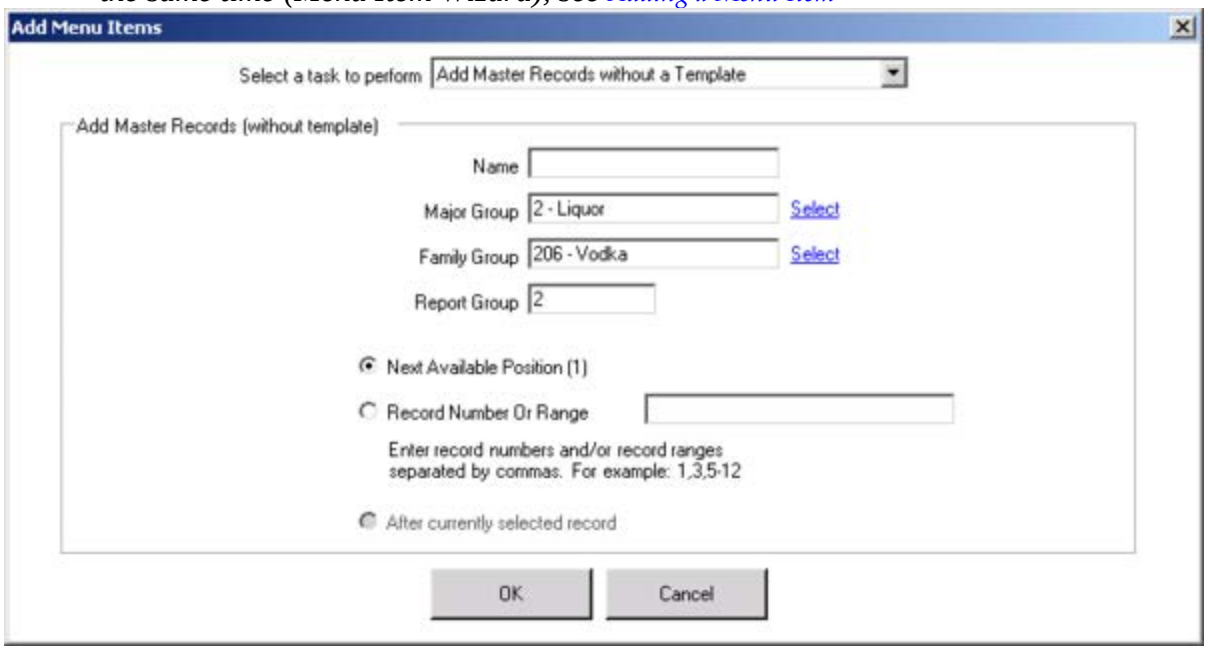
Definition Summary

The image displayed shows Form View for a Menu Item Master record. From form view, the "Definition Summary" is the default view, showing all Menu Item Definition records associated with the Master Record. In addition, a user can use

the "Update Names" function to update all the menu item definition names to have the same name as the Master Record.

Adding Records

For information on adding Menu Item Masters, Definitions, and Prices at the same time (Menu Item Wizard), see Adding a Menu Item



The **Add Master Records without a Template** dialog, from Menu Item Maintenance.

Typically, Menu Item Master records are only added when adding Definitions and Prices at the same time, based on a template record. This section discusses the process of adding only Menu Item Master records, without adding definitions and prices. This method is typically used when creating a new property, and there are no appropriate template records to be used.

Steps for creating Menu Item Master records:

1. From Table View or Form View's Definition Summary view, press the Insert icon on the toolbar, or press the "Insert" key on the keyboard.
2. From the "Select a task to perform" drop-down, choose "Add Master Records without a Template".
3. Enter appropriate values in the following configurable fields:
    - **Name** - Enter the name of the item. Like the standard insert dialog, if the name includes the characters $#$, the $#$ characters will be replaced with the object number of the record being created. For instance, if the name is "My Record $#$", the new record will be created as "My Record 4" if object number 4 is created. ***Note:*** *If the inclusion of the object number will create a name that is*

invalid (too long), the name will be truncated to the proper number of characters.

- **Major Group** - Select a Major Group for the new item. If a menu item master is selected before entering the dialog, the dialog will display to that record's Major Group.
- **Family Group** - Select a Family Group for the new item. If a menu item master is selected before entering the dialog, the dialog will display to that record's Family Group.
- **Report Group** - Select a Report Group Number (0-99) for this Menu Item. Menu Item Reports sort and subtotal by Report Group. If the Report Group number is 0, this Menu Item will not show on Menu Item Reports. Like the Major Group and Family Group fields, this field defaults to the value of the menu item master record that is selected before entering the dialog.

4. Select the appropriate value for the object number:

   Next available position
   When this is chosen, the new record will be created at the next available record number. The image shows "(1)" as the next object number; this is the next available Menu Item Master record for the property.
   After currently selected entry
   When this is chosen, the new record will be created at the next record number after the currently-selected entry. The image shows "(228035)" as the next record after the currently-selected record.
   Record number or range
   When this is chosen, the new record number(s) are user-defined. The total number of new records to be created displays below the text as the programmer enters values into the field. For instance, if the programmer types 50-60, **New Records: 11** will appear.

5. Press OK to create the records. If necessary, the user will be prompted for invalid entries. This module follows the same Error Checking as the standard insert dialog.

Menu Item Field Level Security Setup 2x

This article reviews the enhanced privileges for accessing the Menu Item Maintenance files and their fields in EMC.

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony v2.7.

This article discusses **configuration**, or various programming scenarios, or both.

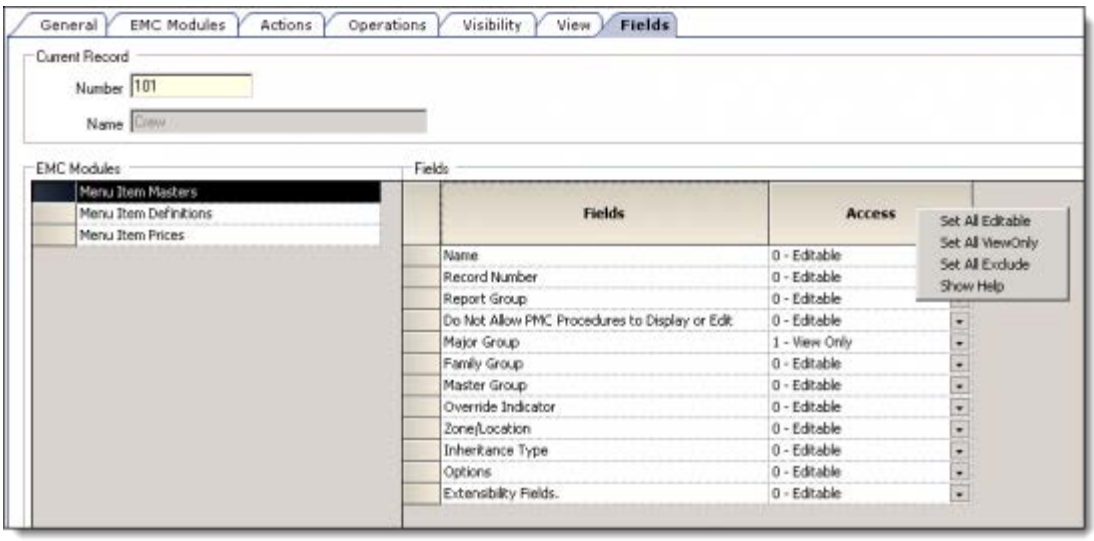
This article discusses functionality that relates to **Simphony v2.x**.

Overview

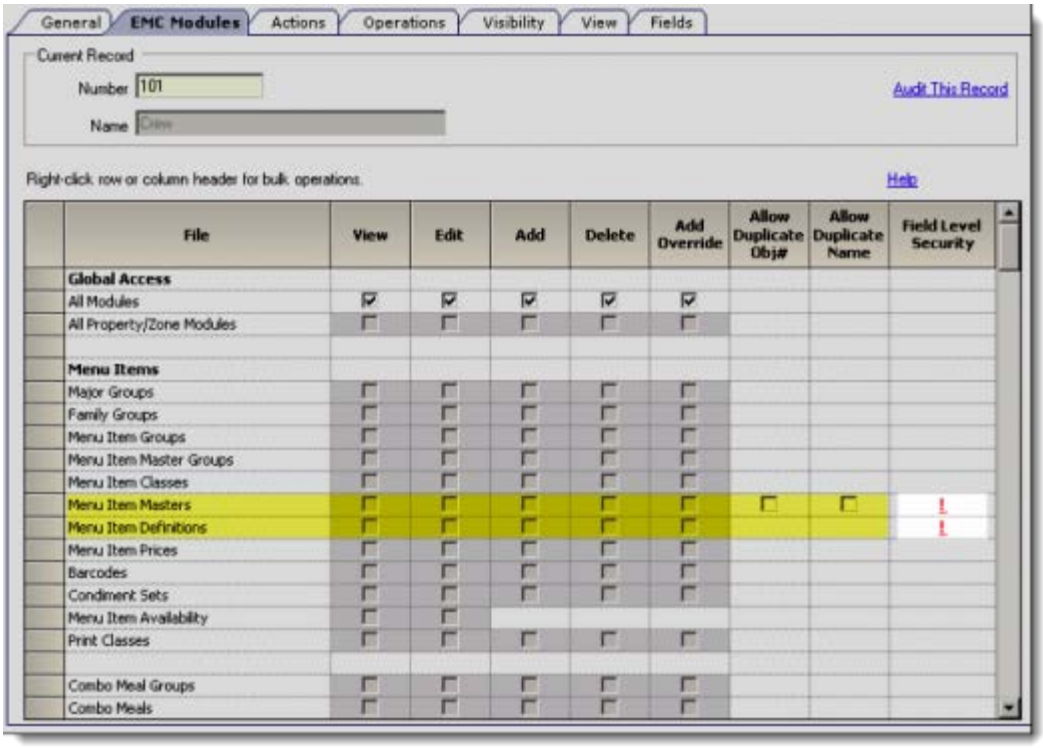
EMC Employee Role privileges have been added so that access to all of the fields within the Menu Item (MI) Master, MI Definition, and MI Price files can be controlled more precisely. Upon upgrading to this release, all current EMC and POS client access privilege controls will remain enforced. However, all of the fields within these files now have Editable, View Only, and Exclude privileges available for configuration. By default, all of the new field access levels are set to Editable (full access privilege).

EMC Configuration

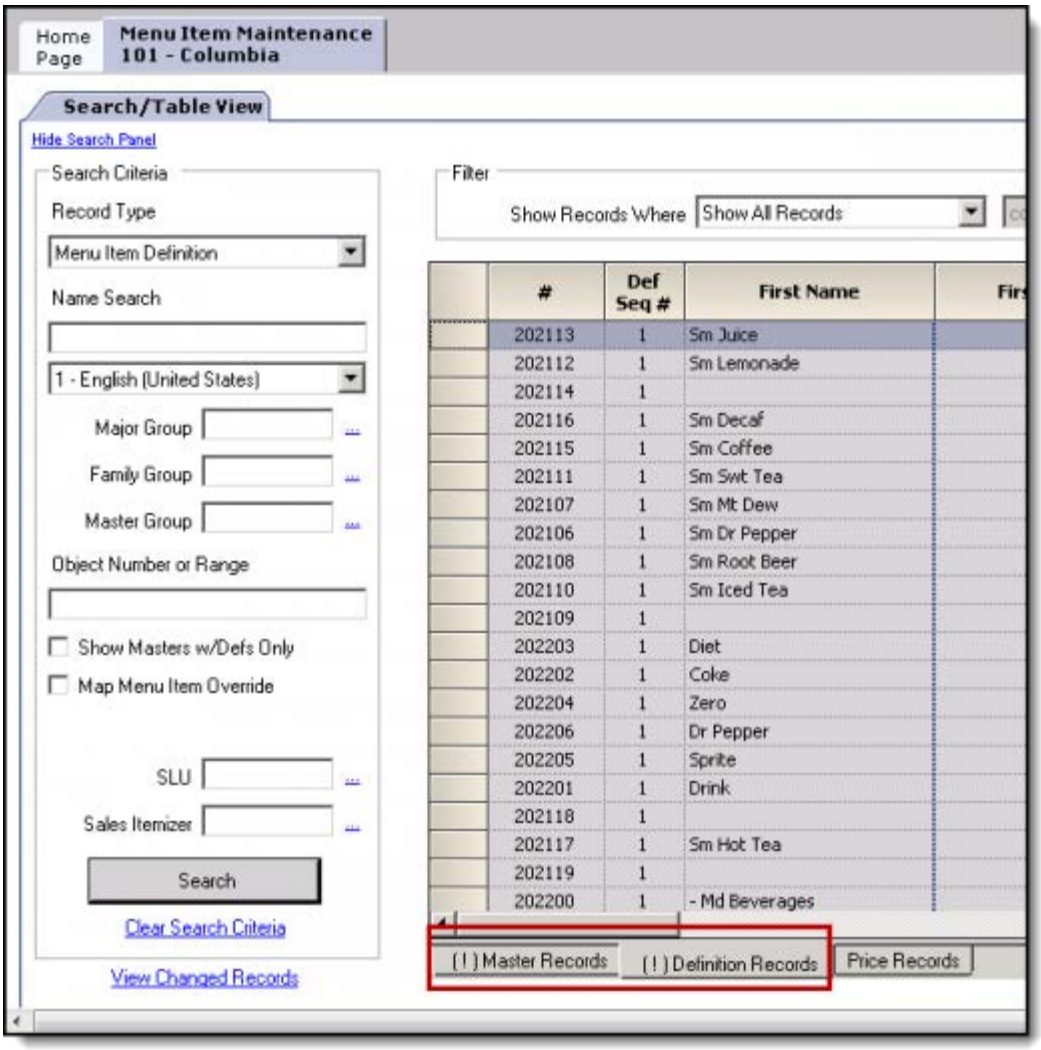
A **Fields** tab has been added to the *EMC | Enterprise level |Configuration tab | Personnel |* ***Roles*** module. For each of the MI Maintenance files, the access levels can be set under the **Access** column.



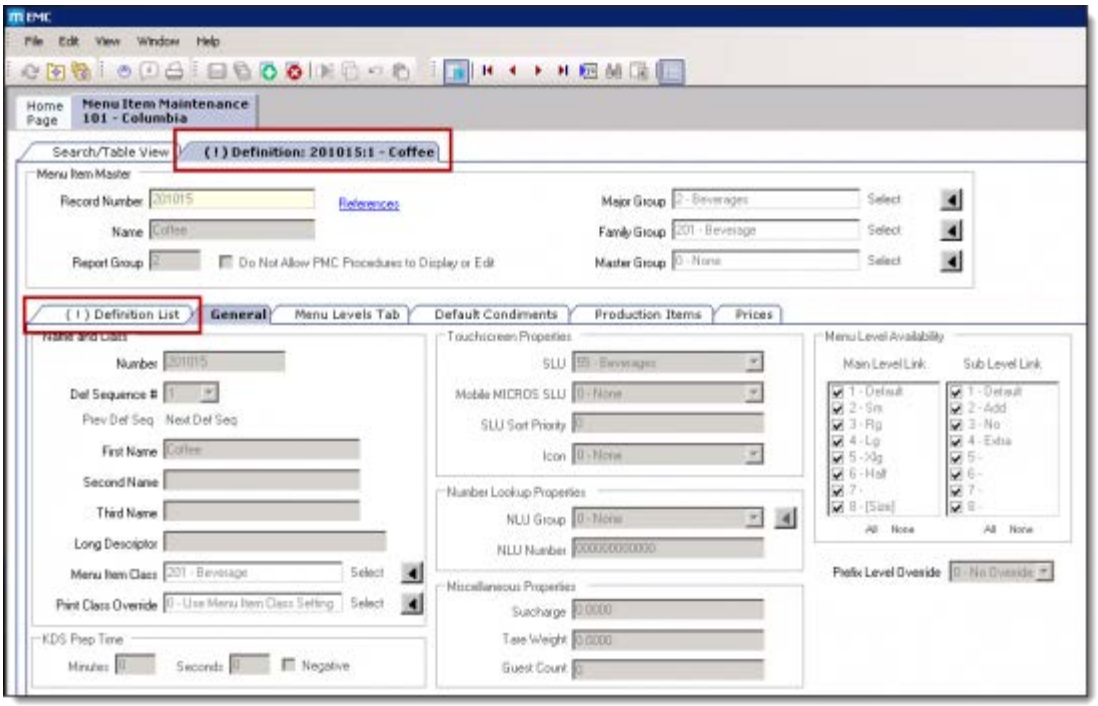
In the *EMC | Enterprise level |Configuration tab | Personnel | Roles | **EMC Modules tab***, a **Field Level Security** column has been added. This column will show an indicator if any of the access privileges located in the Fields tab have been set to View Only or to Exclude access settings.



The indicators display on the tabs located in the MI Maintenance module in Table view. Additionally, if a user attempts to filter a search using an excluded field, the Filter will become disabled.



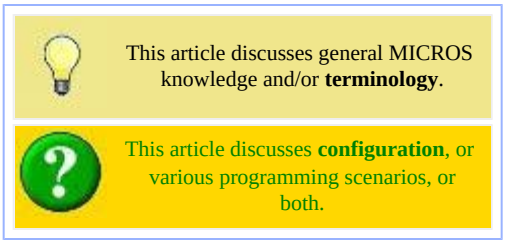
The indicators also display on the tabs located in the MI Maintenance module in Form view.



See also

Simphony 2.7

Menu Level Hierarchy



A **Menu Level Hierarchy** exists to determine which module is dictating default transaction Menu Levels:

1. **Keyboard** - If the workstation is a Keyboard Workstation and its Keyboard Record (see Keyboard Design: Keyboards) has a Main or Sub Level that is not 0, than that is the Main or Sub level that is active.
2. **Serving Periods** - If the active serving period has a Main or Sub Level that is not 0, then that is the Main or Sub level that is active.
3. **Auto Menu Level Table** - If the time of day falls during an active Auto Menu Level, then the Main or Sub Level that is specified for that Auto Menu Level is the active level.
4. **Transaction Menu Level Defaults** - If the Main or Sub Level in Revenue Center Parameters is not 0, then that is the Main or Sub Level that is active.
5. **Main 1 and Sub 1 will always be defaults** - If the other hierarchy rules have not been met, then the workstation will default to Main Level 1 and Sub Level 1.

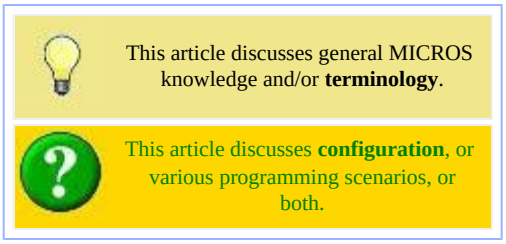
See also

Menu Levels	Menu Levels · Auto Menu Level · **Menu Level Hierarchy** · Menu Level Pop Up · Menu Level Prefixes and Suffixes
Learning series: Menu Levels	

Menu Level Pop Up

The terms **Main Menu Level Pop Up** and **Sub Menu Level Pop Up** can be found in Service Charges, Tender/Media, Discounts, and Menu Item Classes; however, only menu item classes typically are programmed to use the **Menu Level Pop Up** functionality. When a Menu Level Pop Up is programmed, the Menu Level of the transaction will change after the item has been rung. For instance, if the menu item "Spaghetti" belongs to a MI Class that has the Main Menu Level Pop-up of "5", then the following sequence of events will occur:

1. Default Transaction Level is 1 (for this example)
2. User Rings in Spaghetti
3. Now the Transaction Level is 5



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- 2 What are the choices for Menu Level Pop-up?
- 3 Example Overview
- 4 Example 1: Pop-ups dictate condiment pricing
  - 4.1 Diagram
- 5 Example 2: Pop-ups dictate condiment availability
- 6 Example 3: Repeat Round and Multiple Definitions
  - 6.1 Repeat Round Functionality
  - 6.2 The workaround – Using Menu Levels
- 7 Example 4: Returning to Transaction Default
- 8 See also

Why is this functionality necessary?

There are four typical uses of Menu Level Pop Ups. As noted earlier, this functionality is typically used for Menu Items only.

1. To access different prices for forced condiments (Example #1)
2. To access different condiments in the same condiment group (Example #2)
3. Programmers use levels to successfully make Repeat Round work. (Example #3)
4. To return the transaction to the default level. (all examples, but especially Example #4)

What are the choices for Menu Level Pop-up?

0 (Stay Down)
When this is chosen, the Menu Level does not change.

1-8 (Levels 1-8)
When level 1-8 is chosen, this will be the new Menu Level used after the item has been ordered.

Transaction Default
Two checkboxes exist: "Main Level Default" and "Sub Level Default". When checked, the 0-8 combo box is disabled. When "transaction default" is selected, the Menu Level will return to the default transaction level, as determined by the Menu Level Hierarchy.

Example Overview

In the examples and the diagram, the Main Menu Levels are programmed as:

1. Rst-Prnt (Restaurant Parent)
2. Rst-Chld (Restaurant Child)

This is a fairly typical configuration of Shared Revenue Centers. The default menu level in the parent RVC is #1 (Rst-Prnt) and the default level in the child RVC is #2 (Rst-Chld).

Example 1: Pop-ups dictate condiment pricing

In this example, the site has configured salad dressings to have two prices:

- Price #1 ($1.75) is active on Main Level 5
- Price #2 ($0.00) is active on 0-All Levels (any level but 5, this is the price that will be used)

This is a common practice for a site that wants to only program salad dressings in the database once, but have them used for two different purposes. In this example, $1.75 extra is charged for salads when used as an entree. When the dressing prompt is used for salads (house salad menu item), there is no charge.

- **A transaction flow with no Pop-ups** (House Salad is ordered)
    1. Level is #1, Rst-Prnt
    2. House salad is ordered (MI Class: Levels are Stay Down)
    3. Level is still #1, Rst-Prnt
    4. Select dressing (MI Class levels "return" to Rst-Prnt, which didn’t ever change)
    5. Level is still #1, Rst-Prnt

- **Result**
    1. Each dressing has a menu item price record, but prices are not configured to be active on level #1. Dressings were free.

- **A transaction flow with Pop-ups** (Entree is ordered; extra charge for salad)
    1. Level is #1, Rst-Prnt
    2. Shrimp Alfredo is ordered (MI Class: Pop to Main 5)
    3. Level is #5, SPECIAL
    4. Select a dressing (MI Class levels return to Rst-Prnt)
    5. Level is #1 again

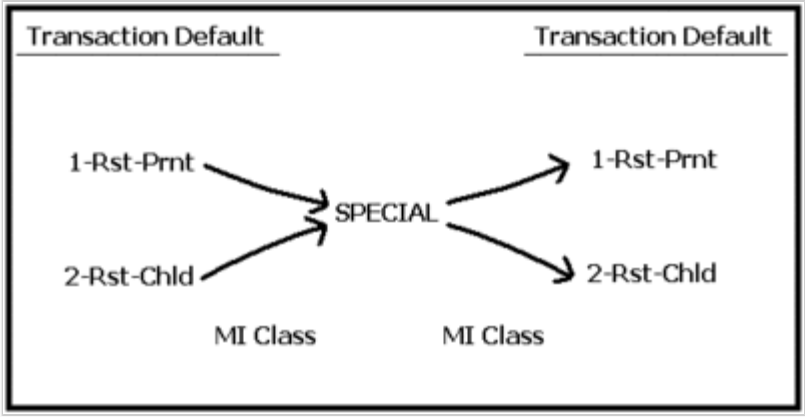
- **Result**

1. Each dressing has a menu item price record, with prices configured to be active on level #1. Dressings were $1.75.

Diagram

This diagram shows what happens during the "Pop Up" transaction:

1. Initially, the level is set to the Transaction Default level (in this example, we are showing a typical configuration where the Main Level name may be the name of the RVC, as for a shared Revenue Center configuration.)
2. When the Entree is ordered, the level changes from the transaction default to another level ("SPECIAL")
    - Menu Item class option to "Pop Up" to Main Level 5
3. After the salad dressing condiment is ordered, the level returns to the transaction default.
    - Menu Item class option to return to the default Main Transaction Level



A graphical display of Menu Level Pop Ups. This diagram shows the possibility of having two RVCs configured: one using Main Level 1 as the default and the other using Main Level 2. When the Menu Level "pops up", the level becomes #5. When the Menu Level then "pops up" to the transaction default level, it returns to Menu Level 1 in one RVC but Menu Level 2 in the other RVC.

Example 2: Pop-ups dictate condiment availability

In this example, the site has configured one condiment group (Meat Temperatures), but they don't want all Meat Temperatures to show for burgers.

This is a common practice at some locations, where jurisdictional laws do not allow burgers to be ordered at "rare" or "medium rare", but steaks (etc.) can be ordered at those temperatures.

- **A transaction flow with no Pop-ups** (Filet Mignon is ordered)
    1. Level is #1, Rst-Prnt
    2. Filet Mignon is ordered (MI Class: Levels are Stay Down)
    3. Level is still #1, Rst-Prnt
    4. All temperatures are available
    5. Medium is selected (MI Class levels "return" to Rst-Prnt, which didn’t ever change)
    6. Level is still #1, Rst-Prnt
- **Result**
    1. In step #4, all temperatures were available.

- **A transaction flow with Pop-ups** (Burger is ordered; rare and medium rare don't appear)
    1. Level is #1, Rst-Prnt
    2. Hamburger is ordered (MI Class: Pop to Main 5)
    3. Level is #5, SPECIAL
    4. Not all temperatures are available on Main Level 5
    5. Medium is selected (MI Class levels return to Rst-Prnt)
    6. Level is #1 again
- **Result**

1. In step #4, not all temperatures were available

This example also follows the diagram from the previous example.

Example 3: Repeat Round and Multiple Definitions

Overview: Proper use of Menu Item Definitions allows two definitions to report as one item. Therefore, it doesn't matter how an item was rung in, as long as it reports as the same item sold. For instance, an Absolut Seabreeze can be ordered two different ways:

1. Absolut (first definition) > Seabreeze
    - In this example, seabreeze is the modifier
2. Seabreeze > Absolut (second definition)
    - In this example, Absolut is the modifier

Repeat Round Functionality

Installers have found that Repeat Round only repeats *Menu Item Master* numbers, therefore the first definition was always trying to be ordered. Consider:

- Definition #1: Absolut (class: "Vodka Requiring Modifier")
- Definition #2: Absolut (class: "Vodka as a Modifier")

Ringing in an item once is fine, because when Seabreeze is ordered, it prompts for Vodkas. It does not matter that the second definition of Absolut is the modifier definition. When Repeat Round happens however, the system literally tries to ring in:

1. Seabreeze
2. Absolut (class: Vodka Requiring Modifier)

Therefore the workstation returns an error, "Condiment required", because the wrong definition was being ordered.

The workaround – Using Menu Levels

The workaround is to make the second definition of Absolut only available on one Menu Level, and make the first definition of Absolut not available on that level. Seabreeze will Pop-up to the level where only the second definition exists, and repeat round will work.

This is explained in further detail on the Programming Liquor page.

Example 4: Returning to Transaction Default

This example has actually been used in all the other three examples, but the example shown here may make understanding the return to "Transaction Default" idea a little clearer. In this example, the site has configured liquors to have two prices:

1. Price #1 ($8.00) is active on Main Level 7 (DOUBLE level)
2. Price #2 ($4.00) is active on 0-All Levels (any level but 7)

This is a common practice for just about every North American hotel database. Typically, the liquor item is $4.00, but if a user presses the Function Key 613 to change to the Main Level #7, the item becomes $8.00.

In our example, **Jack Daniels** is in a Menu Item Class that is programmed to return the Transaction Default level.

- **Regular transaction flow** ($4.00 item)
  1. Level is #1, Rst-Prnt
  2. Jack Daniels is ordered. $4.00. Level "returns" to Level #1 (even though it never changed!)

- **"Double" transaction flow** ($8.00 item)
  1. Level is #1, Rst-Prnt
  2. User presses Function Key 613 to change to Main Level #7
  3. Jack Daniels is ordered. $8.00. Level returns to Level #1

See also

Menu Levels	Menu Levels · Auto Menu Level · Menu Level Hierarchy · **Menu Level Pop Up** · Menu Level Prefixes and Suffixes
Learning series: Menu Levels	

Menu Level Prefixes and Suffixes

A **Menu Level Prefix** or **Menu Level Suffix** is text assigned to a Menu Level, usually for purposes of displaying on order devices or guest checks and customer receipts. Prefixes/Suffixes are generally used to distinguish between sizes; a soda with medium and large price levels may display on order devices as **MED Soda** or **LRG Soda**.

This article contains a **best practices** section.

This article discusses functionality that relates to **Printing**.

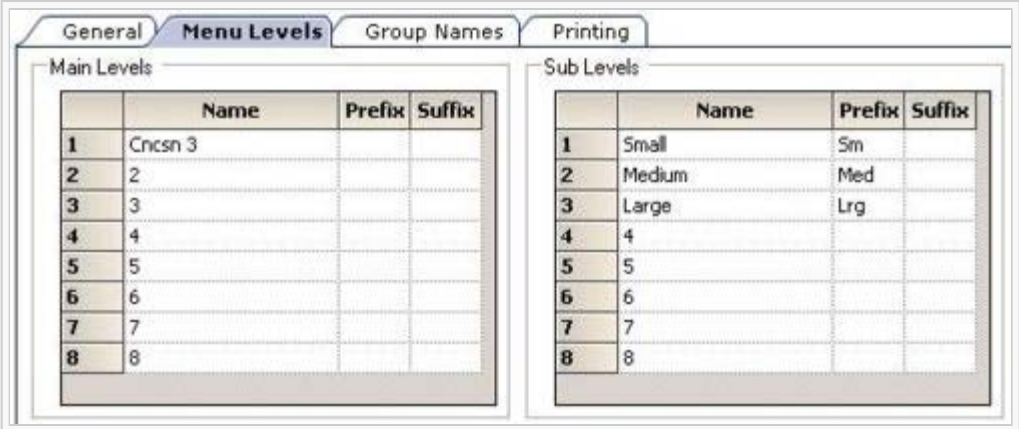
This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 EMC Configuration
  - 1.1 RVC Descriptors
  - 1.2 Menu Item Class
- 2 Workstation Operations
- 3 Best Practices
- 4 See also

EMC Configuration

Prefixes and Suffixes will print on checks when the RVC Descriptors module and the Menu Item Class module are programmed to allow items to do so.



The Menu Levels tab of RVC Descriptors. In this example, the RVC is using Sub Level Pricing. This example shows a typical configuration where levels that are not being used do not have relevant names assigned (i.e., Main Level 2 is simply named "2").

RVC Descriptors

Menu Level names, Prefixes, and Suffixes are configured on the Menu Levels tab of the RVC Descriptors module, located on the RVC scope of the EMC. The prefixes and suffixes allow a length of 4 characters.

Menu Item Class

Two options in the Menu Item Class module determine if the Prefixes and/or Suffixes will print. These options are:

28 - Print Main Level Prefix and Suffix
: Select this option to cause the Main Level Prefix and Suffix to print on order output, guest checks, and customer receipts; and also to display on workstation screens.

29 - Print Sub Level Prefix and Suffix
: Select this option to cause the Sub Level Prefix and Suffix to print on order output, guest checks, and customer receipts; and also to display on workstation screens.

Workstation Operations

Consider the example in the image. When the Sub Level is "2", the prefix "Med" will show in front of any item that has the Menu Item Class option bit #29 enabled. If an item has #29 enabled and the transaction is on Sub Level "4", no prefix will print, because no prefix is defined. Therefore, the rule for printing sub level prefixes and suffixes is as follows: *The prefix and/or suffix must be defined, and option #29 must be enabled.* For main levels, a similar rule is true: *The prefix and/or suffix must be defined, and option #28 must be enabled.*

Best Practices

When programming Menu Level Prefixes and Suffixes, the following guidelines are generally followed:

- Suffixes are almost never used. Prefixes and suffixes can be 4 characters, and order chits print up to 12 characters. If "Med" is the prefix or suffix, and "Cappuccino" is the item, the results displays like this:
  - Suffix: **`Cappuccino Med`** will be truncated to **`Cappuccino M`**. This is not intuitive to the person preparing the item.
  - Prefix: **`Med Cappuccino`** will be truncated to **`Med Cappucci`**.
- If suffixes are used, they should never be used in conjunction with prefixes. The reasons for this are similar to the reasons from the first point: it is unlikely that the suffix will ever display on order chits.
- Menu Item Class option bits #28 and #29 are often enabled. This guideline isn't as rigid as the first two, but it seems that these options are enabled in many databases, and that the prefixes/suffixes are just programmed with blank names. If the site wants to print prefixes/suffixes at a later time, a programmer configures the RVC Descriptors module, and does not need to make changes to the MI Classes.

See also

- RVC Descriptors

Menu Levels	Menu Levels · Auto Menu Level · Menu Level Hierarchy · Menu Level Pop Up · **Menu Level Prefixes and Suffixes**
Learning series: Menu Levels	

Need a question answered about the **Menu Level Prefixes and Suffixes** article? Want to offer a suggestion or a correction?
Click here to discuss this page.
Retrieved from "http://wiki.micros.com/wiki/index.php?title=Menu_Level_Prefixes_and_Suffixes"
Categories: Best practices | Printing | Configuration | Learning series: Menu Levels | All pages

Menu Levels

Menu Levels determine "where and when" a user exists during a MICROS transaction. **Menu Level** is a proprietary term that relates to MICROS functionality, and has been around since at least 2700. A Main Menu Level and a Sub Menu Level are always active. The programmer determines which levels are active by default (using the Menu Level Hierarchy) and can allow the levels to be changed during a transaction either by use of a function key or through the use of Menu Level Pop-ups. The status line below BOB shows the Main and Sub Level names that are active.

This article discusses the usage of one or more **Function Keys**. (607-624, 638, 639)

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Why are Menu Levels necessary?
- 2 Common Usage
- 3 EMC Configuration
  - 3.1 RVC Descriptors
  - 3.2 RVC Parameters
  - 3.3 Serving Periods
  - 3.4 Menu Item Class
  - 3.5 Menu Item Definitions
- 4 Function Keys
- 5 Example Configurations
  - 5.1 Quick Service Beverage Sizes
  - 5.2 Happy Hour Example
- 6 Privileges
- 7 See also

Why are Menu Levels necessary?

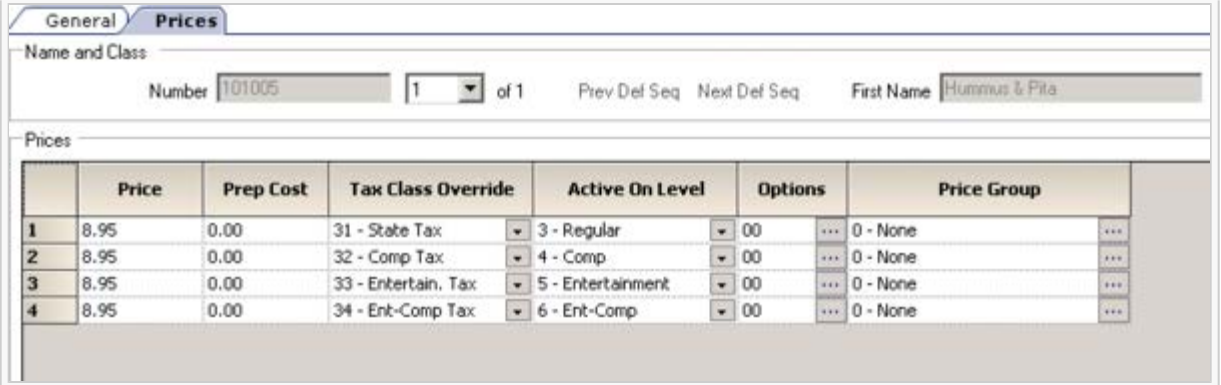
1. Menu levels are used to determine what a user can and cannot access during a transaction. For example, shared revenue centers are often programmed so that two RVCs are active on different transaction levels; thus some items are visible to one Revenue Center, while the other RVC displays different items..
2. Menu levels allow different prices for one menu.

Common Usage

1. **Quick-Service environment**
   - Small,

Medium, Large Beverages

2. **Restaurant environment**
   - Double liquor pricing
   - Happy Hour pricing
3. **Programmers' preferences**
   - Shared revenue centers. Each Main Level represents a different RVC
     - Restaurant
     - Bar
     - Room Service
   - Each Sub Level represents a Serving Period
     - Breakfast
     - Lunch
     - Dinner
   - Main Level called "Bar" or "Server"
     - Bartender terminal is on the Bar level. Liquor definitions on the Bar Level do not prompt for modifiers.
     - Server terminals are on the Server level. Liquor definitions on the Server Level do prompt for modifiers.
4. **Casino environment**
   - Casinos frequently use the most "sophisticated" setups regarding levels. Comp Level, Entertainment Level, Entertainment Comp Level, etc. The site will have several definitions and/or prices for an item, and the tax may be different depending on the active level.



An image of multiple Menu Item Price records for the same definition. Each price is active on a different Menu Level. This type of programming is common in casino environments.

EMC Configuration

There are several areas of the EMC where menu levels can be configured, based on the type of operation and the usage of Menu Levels in the Revenue Center. (For information on configuring the Default Transaction Levels, see Menu Level Hierarchy.)

RVC Descriptors

The Menu Level names are programmed on the Menu Levels tab of the RVC Descriptors module. There are always eight menu levels in a revenue center; it is not possible to add or delete menu levels. In this module, the levels are given names and, if necessary, prefixes and suffixes.

RVC Parameters

- The Menu Levels tab of this module allows configuration of the default levels for the revenue center, and this is also where the Auto Menu Levels are programmed.
- Two RVC Parm "General" option bits control the Main/Sub Level behavior at the end of a transaction

23 - Retain Current Main Level after a Transaction
Select this option to cause the workstation to remain at the current Main Level at the completion (service total, tender, transaction cancel, etc.) of a transaction. Disable this option to cause the workstation to pop-up to the default Main Level.

24 - Retain Current Sub Level after a Transaction
Select this option to cause the workstation to remain at the current Sub Level at the completion (service total, tender, transaction cancel, etc.) of a transaction. Disable this option to cause the workstation to pop-up to the default Sub Level.

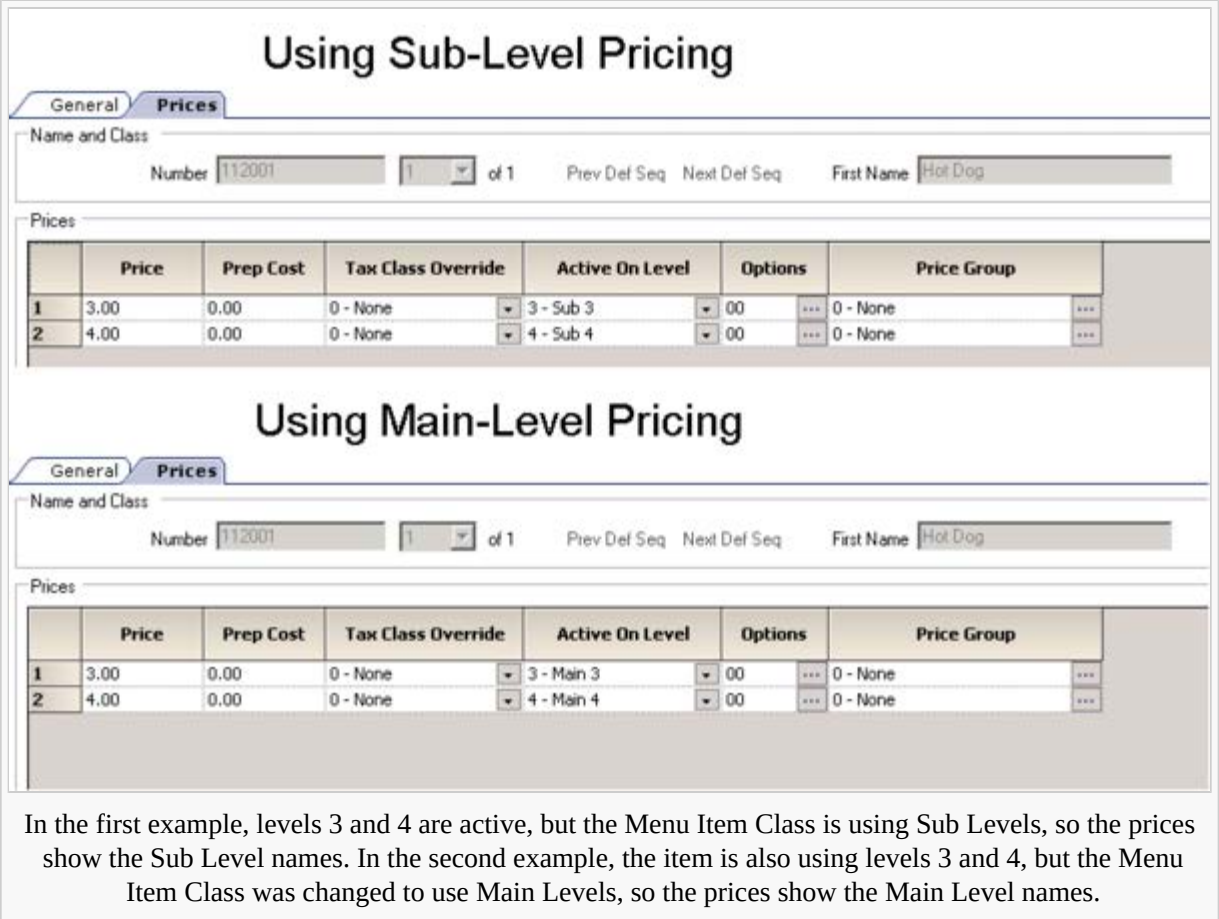
Serving Periods

Set the default main and sub levels, if Serving Periods are being used to control the default transaction levels.

Menu Item Class

Several Menu Item Class options affect Menu Levels:

10 - ON = Use Sub Level Pricing; OFF = Use Main Level Pricing
Select this option to use Sub Level pricing for this Menu Item Class. Do not select this option to use Main Level pricing. This option is usually only pertinent for menu items that have more than one price. The image on the right describes this bit's behavior; even though the Menu Item Prices are configured the same, this bit controls the Main Level vs. Sub Level behavior.



In the first example, levels 3 and 4 are active, but the Menu Item Class is using Sub Levels, so the prices show the Sub Level names. In the second example, the item is also using levels 3 and 4, but the Menu Item Class was changed to use Main Levels, so the prices show the Main Level names.

26 - Keep Main Levels with Repeat Round

Select this option to force menu items in this class that are ordered using the **[Repeat Round]** function key (606) to be ordered using the same Main Level (and its prices) that were in effect during the most recent service round. Disable this option to use current menu levels. The effect of this option is as described here: Liquor menu items are often used with a **[DOUBLE]** Main Level. If a **[DOUBLE]** Vodka is ordered and service totaled, the **[Repeat Round]** function key key will repeat a **[DOUBLE]** Vodka if this option is enabled, but only a Vodka (no double) if this option is disabled.

27 - Keep Sub Levels with Repeat Round

Select this option to force menu items in this class that are ordered using the **[Repeat Round]** function key (606) to be ordered using the same Sub Level (and its prices) that were in effect during the most recent service round. Disable this option to use current menu levels. The effect of this option is as described here: Liquor menu items are sometimes used with a **[DOUBLE]** Sub Level. If a **[DOUBLE]** Vodka is ordered and service totaled, the **[Repeat Round]** function key will repeat a **[DOUBLE]** Vodka if this option is enabled, but only a Vodka (no double) if this option is disabled.

28 - Print Main Level Prefix and Suffix

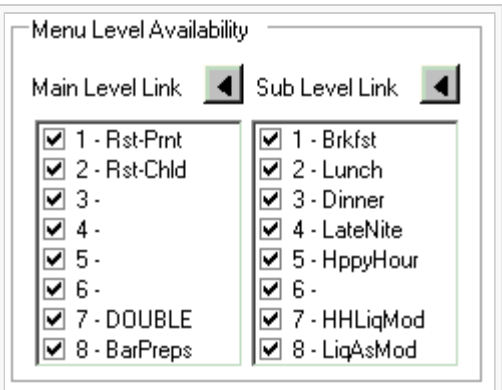
Select this option to cause the Main Level Prefix and Suffix to print on order chits, guest checks, and customer receipts; and also to display on workstation screens. The prefixes/suffixes are often used to show the size of a menu item (Small or Large Cola, for example), and therefore it is wise to enable this option bit in this situation, as to not anger the customer. (The customer will wonder why one Cola is $2.50, and the other Cola is $1.50... but if prefixes are printing, the customer will understand that the "Lrg Cola" is $2.50 and the "Sm Cola" is $1.50.)

29 - Print Sub Level Prefix and Suffix

Select this option to cause the Sub Level Prefix and Suffix to print on order output, guest checks, and customer receipts; and also to display on workstation screens. The prefixes/suffixes]] are often used to show the size of a menu item (Small or Large Cola, for example), and therefore it is wise to enable this option bit in this situation, as to not anger the customer. (The customer will wonder why one Cola is $2.50, and the other Cola is $1.50... but if prefixes are printing, the customer will understand that the "Lrg Cola" is $2.50 and the "Sm Cola" is $1.50.)

Menu Item Definitions

Menu Item Definitions can be programmed to be active or inactive on each level.



This images shows the Menu Level Availability for a Menu Item Definition.

Function Keys

Several function keys can be used to change the active menu level during a transaction:

607-614 - Main Levels 1-8
: These keys are used to change the Main Level of the transaction. For instance, when #608 is used, the Main Level will become Main Level 2.

615-622 - Sub Levels 1-8
: These keys are used to change the Sub Level of the transaction. For instance, when #616 is used, the Sub Level will become Sub Level 2.

623 - Main Level NLU
: This key is used to provide the user a list of the Main Levels, so that the Main Level of the transaction can be changed.

624 - Sub Level NLU
: This key is used to provide the user a list of the Sub Levels, so that the Sub Level of the transaction can be changed.

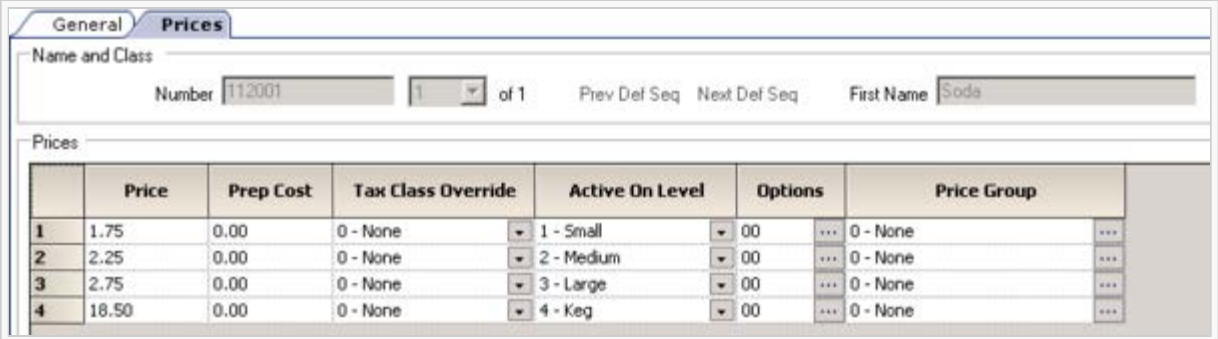
638 - Change Price Main Level
: This key is used to change all the prices (active on a specified Main Level) entered on a check to different prices; this key applies only to Menu Items using Main Level Pricing. When this key is used, the workstation will prompt the user to select a Main Level. Then, the user will be prompted again for a Main Level. At this point, the workstation will change the price of all menu items using the first Main Level selected to the second Main Level selected.

639 - Change Price Sub Level
: This key is used to change all the prices (active on a specified Sub Level) entered on a check to different prices; this key applies only to Menu Items using Sub Level Pricing. When this key is used, the workstation will prompt the user to select a Sub Level. Then, the user will be prompted again for a Sub Level. At this point, the workstation will change the price of all menu items using the first Sub Level selected to the second Sub Level selected.

Example Configurations

Quick Service Beverage Sizes

Configuration for a Quick Service RVC where levels dictate different Beverage Sizes.



An example of Menu Levels programmed for beverage sizes.

1. **RVC Descriptors > General tab**
   - Main Menu Level
     - 1-Quick
   - Sub Menu Level
     - 5-Small, Prefix: Sml
     - 6-Medium, Prefix: Med
     - 7-Large, Prefix: Lrg
2. **RVC Parameters > Menu Levels**
   - Transaction Default Main Level: 1-Quick

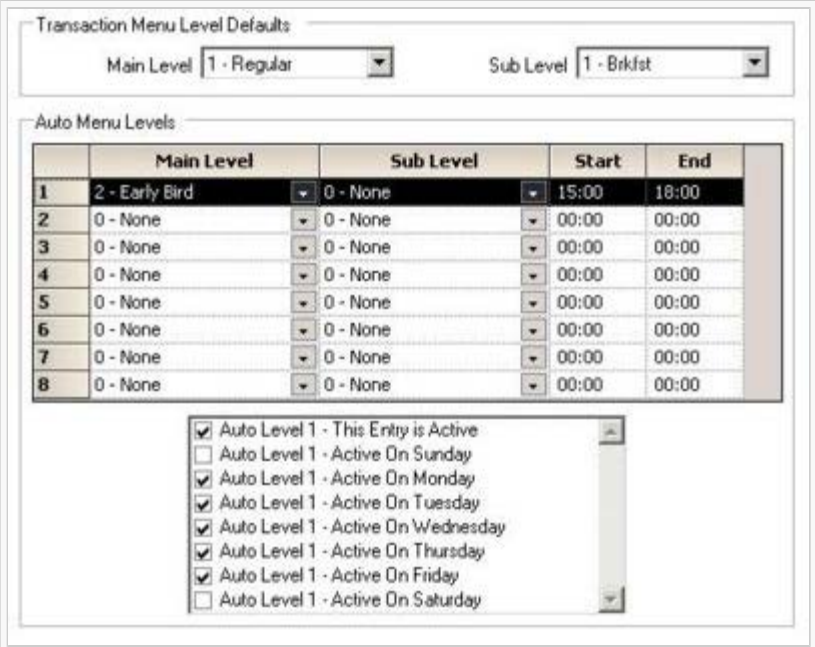
- Transaction Default Sub Level: 5-Small

3. **Menu Item Class**
   - For the MI Class containing "Cola", enable:
     - 10-Use Submenu Level Pricing
     - 29-Print Submenu Level Prefix and Suffix
4. **Touchscreen/Keyboard Setup**
   - Include the following keys
     - 615-Small
     - 616-Medium
     - 617-Large
5. **Menu Item Setup**
   - See pricing tab displayed on the right

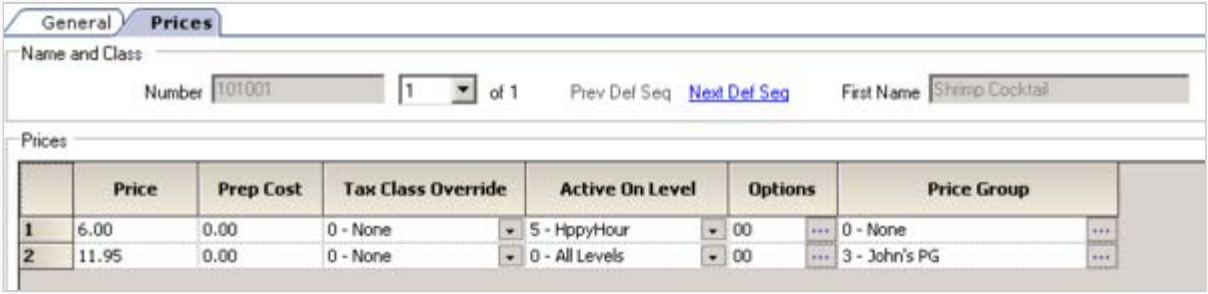
Happy Hour Example

Configuration for a Restaurant RVC where levels change with the Auto Menu Levels configured

1. **RVC Descriptors**
   - Sub Menu Level
     - 4-Happy Hour
2. **RVC Parameters**
   - Auto Menu Level Table - example configuration show at the right
3. **Menu Item Class**
   - For the Menu Item Class containing Appetizers, enable:
     - 10-Use Submenu Level Pricing
4. **Menu Item Setup**
   - See the image on the right



An example of the configuration of the Auto Menu Level table.



The price tab of a Shrimp Cocktail menu item definition with two prices configured. Note that the "All" price is configured as the second price level; this behavior is described in Menu Item Price: Which price is active?.

In Simphony, it may be easier to

use the Automatic Discount feature for Happy Hour discounts.

Privileges

If operators will change the Menu Level manually during a transaction (to order a "small" beverage or a "double" shot of liquor), the operator must be associated with an Employee Role with one or both of these options enabled:

- Auth/Perform Change of Main Menu Level
- Auth/Perform Change of Sub Menu Level

In general, Employee Roles are programmed so that almost all employees have privileges to these two bits.

See also

Menu Levels	**Menu Levels** · Auto Menu Level · Menu Level Hierarchy · Menu Level Pop Up · Menu Level Prefixes and Suffixes
Learning series: Menu Levels	

MICROS Mini Printer Setup

This article reviews the setup of the MICROS Mini Printer. This is a 32 column printer (the paper is 2 inches in width) that can attach to the side of an mStation (right side only).

Contents

- 1 Overview
- 2 EMC Configuration
- 3 See also

This article discusses a topic related to **hardware**.

This feature or functionality was introduced in Simphony 1.6 Maintenance Release 6.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

Overview

The MICROS Mini Printer can be configured to perform the following print tasks (among others):

- Customer Receipts
- Guest Checks
- KDS Runner Chits
- Order Device Output
- Workstation Reports

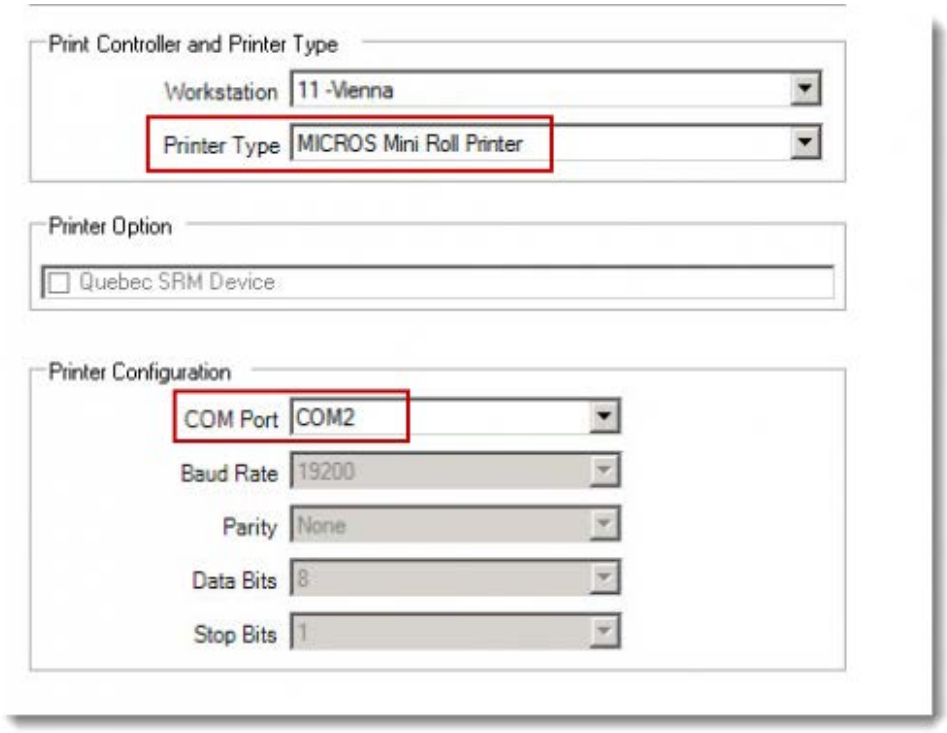
This printer may only be attached on right side of the mStation as shown here.

MICROS Mini Printer attached to an mStation

EMC Configuration

To configure the MICROS Mini Printer, follow the steps outlined below:

1. Access and navigate to the *EMC-> Property-> Property Hardware-> **Printers*** module.
2. Select the new **Printer Type** named **[MICROS Mini Roll Printer]** from the dropdown menu.
3. In order to be properly power the printer, it ***must*** be connected to **COM Port 2** on the mStation. Select the **[COM2]** choice from the "**COM Port**" dropdown menu.
4. **Save** all changes.

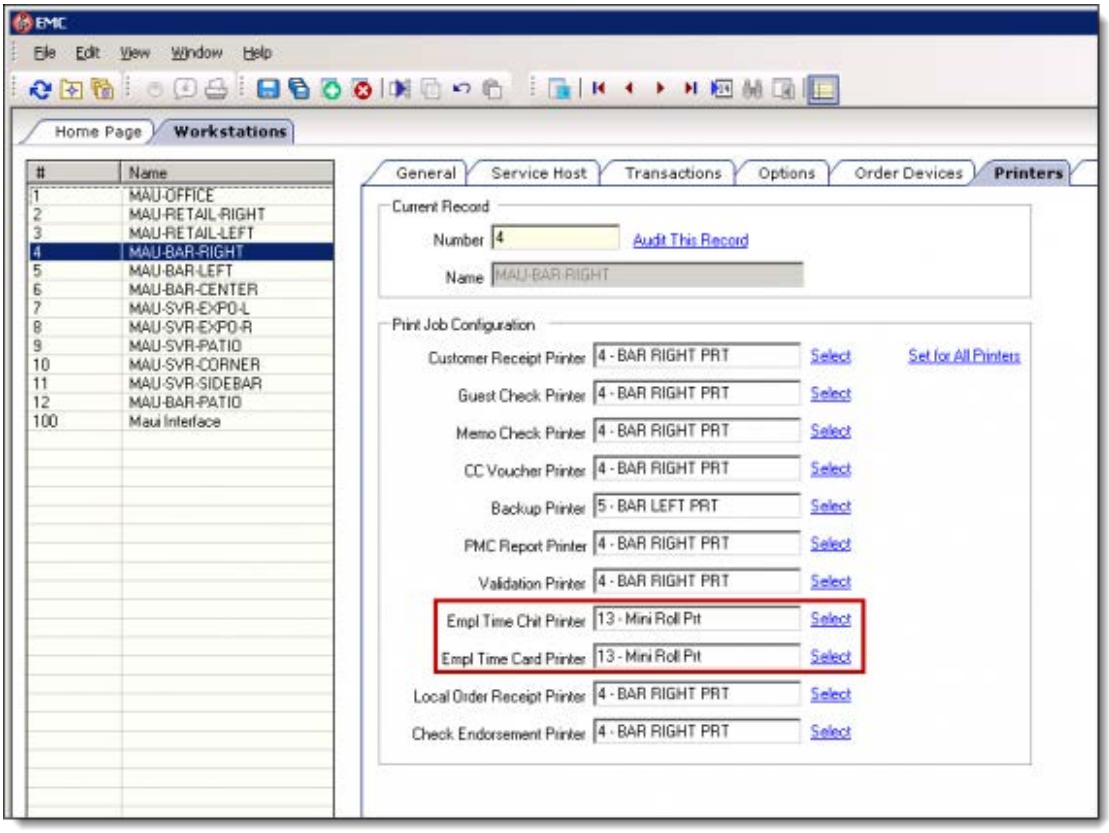


The MICROS Mini Printer does ***not*** have Auto-cut capability; rather it has a serrated edge to help tear the paper.

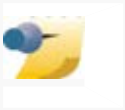
Since the MICROS Mini Printer does not have Auto-Cut capabilities, there are some instances whereby operators need to have a slight delay occur in order to allow them the opportunity to tear individual print tasks prior to a second voucher or chit printing. The following configuration details that can affect such a printing delay should be noted:

- For non-Auto-cut printers, it was determined that if the option located in the *EMC-> Revenue Center-> RVC Information-> RVC Parameters-> CA/EDC tab->* ***Credit Card Options***-> **[4 – Prompt Before Printing Second Voucher]** was enabled or not, the first print task would occur and then operators will receive a `Print second voucher` prompt message. Before responding to the prompt, operators will have the opportunity to tear the first print task and then respond to the prompt by selecting either the '**Enter/Yes**' or '**Clear/No**' buttons on the Ops display to continue with the second print task.

- When operators Clock In/Out on a Workstation, 'Employee Time Chit'



printers can be assigned in the *EMC-> Property-> Property Hardware-> Workstations-> Printers* tab-> ***Print Job Configuration*** section. If a non-Auto-cut printer has been assigned as the 'Employee Time Chit Printer' and the 'Employee Time Card Printer', the Time Chit will print and operators will receive a `Print Time Card` prompt. Again, before responding to the prompt, the delay affords operators the time to tear off the 'Time Chit'. Operators can respond to the prompt by selecting either the '**Enter/Yes**' or '**Clear/No**' buttons on the Ops display to continue with the 'Time Card' print task. If a printer other than a MICROS Mini Printer is assigned for either of the 'Employee Time Chit\Card' printing tasks, operators will ***not*** receive a prompt as the tasks will print independently of each other.



Note: This printer cannot be attached to a Sales Recording Module (SRM) device. Additionally, the *EMC-> Property level-> Property Parameters-> **Options***-> **[38 - Enable Sales Recording Module]** option ***must*** be disabled.

See also

- MTablet and mStation
- Simphony 1.6 Maintenance Release 6

New CAL 2.x

Contents

- 1 Enhanced package storage
- 2 Enhanced installation process
  - 2.1 Simphony version 2.6 installation process
  - 2.2 Simphony 2.x upgrade to version 2.6 process
  - 2.3 Simphony version 2.6 upgrade to higher versions process
- 3 Migrated CAL handling to the 2.x Gateway
- 4 Configuring CAL packages
  - 4.1 Configuring CAL package permissions by employee role
  - 4.2 Configuring CAL packages
    - 4.2.1 Changing custom package, deployment order, and platform type
    - 4.2.2 Setting deployment schedules
      - 4.2.2.1 Adding a deployment schedule for the current CAL
      - 4.2.2.2 Adding a deployment schedule for a group of CAL packages
      - 4.2.2.3 Understanding the safeguard against duplicate package deployment
      - 4.2.2.4 Switching a package version
- 5 Viewing CAL package contents
- 6 See also

This article discusses a **technical topic** that is not intended for all readers.

This article discusses **configuration**, or various programming scenarios, or both.

This feature or functionality was introduced in Simphony 2.6.

This article lists the changes and features to Client Application Loader (CAL) that were introduced with Simphony version 2.6 GR. This documentation refers to post-Simphony 2.6 versions of CAL as **New CAL** because of the implementation of significant differences and changes. New CAL contains features and changes that facilitate improved overall CAL package handling and distribution.

Enhanced package storage

New CAL stores packages in the transaction (Simphony) database to:

- Provide a central storage location.
- Eliminate CAL folder synchronization across application servers.
- Eliminate the need to access the application server to upload custom CAL packages to a directory in the CAL file structure.

Enhanced installation process

The Simphony installer automatically uploads the standard CAL packages for new versions of software, including Hot Fixes.

Simphony version 2.6 installation process

The Simphony installer performs the following tasks:

1. Copies files to the Simphony2\EGatewayService\CAL folder.
2. Loads all existing CAL packages from folders complying with the *Name*2.0 naming convention (for example, ServiceHost2.0) into the transaction database.

Simphony 2.x upgrade to version 2.6 process

The Simphony installer uploads the existing standard CAL packages with the *Name*2.0 naming convention (see previous paragraph) and custom CAL packages with the *Name*2.0 naming convention into the database. The deployments for previous versions are set to Skip. The Simphony setup program copies the new CAL packages and uploads them into the database. There are no new deployment schedules for version 2.6 packages.

Simphony version 2.6 upgrade to higher versions process

The Simphony installer performs the same tasks as a new Simphony installation.

When uploading CAL packages into the transaction database, the Simphony setup program verifies that all files listed in the Setup.dat file with the TRANSFERFILE command are present on the drive. If a file is listed in the Setup.dat, but does not exist on the drive (or if Simphony cannot upload it into the database), the system does not load that particular platform's copy of the package. After an upgrade, a warning message notifies you that the ServiceHostPrereq and McrsCAL packages do not contain files for the Mobile MICROS MC40 platform.

Migrated CAL handling to the 2.x Gateway

CAL seamlessly transitions to the 2.x Gateway. You do not need to re-CAL workstations or change the remote EMC configuration.

Configuring CAL packages

Configuring CAL package permissions by employee role

1. In the EMC, select Enterprise, select Configuration, select Roles, and then select **EMC Modules**.
2. Select and deselect the **View**, **Edit**, **Add**, and **Delete** permission for the CAL Package groups.

Configuring CAL packages

1. In the EMC, select Enterprise, select Setup tab, and then select **CAL Packages**.

   CAL packages belong to the following two subgroups:

   - The Simphony subgroup contains the standard packages installed by Simphony.
   - The Custom subgroup contains the packages added by an administrator.

2. You can use the following command links in the CAL packages tree:

Command	Description
Switch View	Change the grouping of CAL packages from name to version and back. For example, you can view packages belonging only to Simphony version 2.6.
Refresh	Refresh the entire page.
Add custom CAL Package	Upload a CAL package from a local file system to the EMC and database. Uploaded packages appear in the Custom subgroup.
Delete	Delete the selected CAL package.

Changing custom package, deployment order, and platform type

You can change the name of a custom package, its deployment order, and its platform type using the CAL Package Configuration tab.

Use the Limit to Services section to specify deployment to workstations with specific Service Host types. Select the appropriate service. If you do not select a service, the package deploys to every Service Host based on the deployment schedule. If you select one or more services, the package deploys only to Service Hosts that run selected services. This means that when you configure a new service to the existing Service Host, there is no additional deployment for this Service Host. If there is a CAL package specific to the service, the Service Host downloads it immediately.

For example, users must select the Check And Posting service in the Limit to Services group because the Cash Management Lite module only runs on CAPS Service Hosts. This causes all Service Hosts that run CAPS to automatically download the Cash Management CAL package if a deployment schedule exists for the enterprise or property.

Setting deployment schedules

A deployment schedule describes the when and which client(s) will download a specific package for deployment. You must configure deployment schedules in order to deploy CAL packages. You can view all existing deployment schedules

for a selected package and its children on the Deployment Schedules tab. You can select the **All** node to view all deployment schedules for all CAL packages.

You can add a deployment schedule:

- For the current CAL
- For a group of CAL packages

Adding a deployment schedule for the current CAL

1. On the navigation tree, click the CAL package you want to deploy.
2. Click **Add Deployment** to create a new row in the deployments grid with the default values.
3. Use the filter options to include or exclude deployment records.

- **CAL Package**: Enter the version number
- **Deployment Type**: Select the type of deployment (either **Property/Enterprise** or **Specific Service Host**) and enter the property number
- **Action to Take**: Select **Install** or **Skip**
- **Deployment Dates**: Select **Show Completed** or **Show Active**

You can configure multiple deployment schedules for the same CAL package. The system uses the most granular deployment when given multiple deployment schedules.

For example, if you configure a deployment schedule for a workstation and a deployment schedule for the property, the system uses the workstation deployment.

If you configure a CAL package deployment for a property with **Action to Take - Install** and a deployment for a workstation with **Action to Take - Skip**, the CAL package is not installed on the workstation.

Adding a deployment schedule for a group of CAL packages

Certain nodes in the tree do not have corresponding CAL packages. You can use these nodes for grouping CAL packages. For example, you can configure packages that affect All Simphony or affect the Service Host.

1. Select a node without a corresponding CAL package.
2. Click **Add Deployment**.
3. In the Choose CAL Package For Deployment dialog box, select a CAL package to deploy from the available drop-down menu. The list of available CAL packages in the dialog changes depending on the node selected in the tree.

For example, if you select the Simphony node in the tree, the list of packages contains all Simphony CAL packages. If you select the Service Host node, the list contains only the Service Host packages.

4. Select the **Deployment Type**: Property/Enterprise or Specific Service Host.
5. Click the ellipsis button (**…**).
6. In the Select Properties dialog box, select one or more properties for an enterprise or property deployment.

- Filter lengthy property lists by property number or name.
- Select the **Show already configured properties** option to prevent you from configuring duplicate deployment schedule records.

- Press and hold the Ctrl key while performing a left mouse click to select multiple properties. You can click the **Select All** or **Clear All** links to affect all properties in the list.

7. Click **OK**.
8. For a specific Service Host deployment, select multiple service hosts.

Understanding the safeguard against duplicate package deployment

The Simphony installer derives an internal name and an internal version for Simphony packages from the Setup.dat file. The internal name and version typically differs from the package name and version. For example, ServiceHost 2.5 and ServiceHost 2.6 are two separate packages, but they share the same internal name, ServiceHost. The installer identifies the matching internal names and prevents installing and running two versions of ServiceHost.exe on the same client.

The CAL client uses the internal name and version from the Setup.dat file to determine whether to download the CAL package. EMC does not allow you to configure duplicate schedules for packages with the same internal name. For example, if you have a deployment schedule for ServiceHost.2.6 to deploy to the enterprise, adding an enterprise deployment for ServiceHost.2.6 and even ServiceHost.2.5 results in the following error message: Cannot save duplicate deployments.

When you upgrade Simphonyto a new version, the installer does not add new deployments (with one exception) and does not change existing packages or schedules. As a result, you do not need to change deployment schedules from **Install** to **Skip**. The installer preserves CAL packages and adds new versions.

Switching a package version

If the CAL package has multiple versions:

1. Select the package deployment.
2. Click **Change Package Version**.
3. Select the desired version.
4. Click **Deploy**.

If the CAL package does not have multiple versions:

1. Delete the existing deployment.
2. Add a new deployment for the new version.

Viewing CAL package contents

1. Click the **Package Contents** tab to EMC inclusions in each CAL package.
2. The Platforms field lists all available platform types, the package name and Setup.dat version. Select a platform to list all files included in the package in the Files list.
3. You can use the following command links:

Command	Description

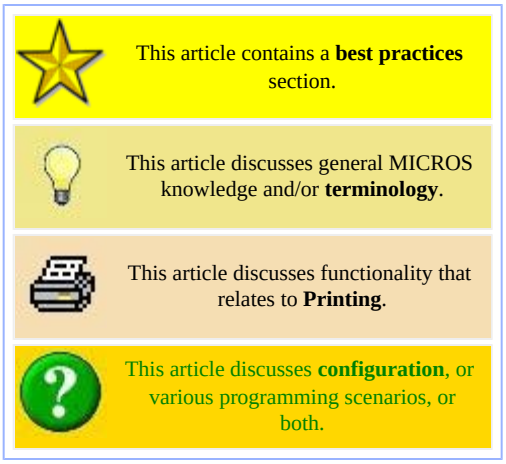
View Selected File	Opens the file in Notepad if the file length is less than 32K in size.
Reload Package From Disk	Reloads the entire CAL package for all platforms and files from the specified file system location. The user must log in with the same hierarchy level as the CAL package or the command is not available. ▪ If an existing default or custom package is modified, you must reload the package. Make sure the Setup.dat version matches the file before it loads to avoid reloading the package on all clients. ▪ After installation you must replace the local machine with the load balanced address in SimphonyInstall.xml, and then reload the entire package.
Save Package to Disk	Saves the entire CAL package for all platforms and files to the specified file system location. You must select an empty output folder.

See also

- CAL Packages
- Simphony 2.6

On Demand Customer Receipt

An **On Demand Customer Receipt** is a term that applies to a specific configuration for Fast Transactions in a MICROS environment. With this configuration, a customer receipt does not print at the end of the transaction. Instead, the employee has the opportunity to press a **[Print Customer Receipt]** function key (524) after the transaction, if the guest requests a receipt. The idea behind this configuration is that a Tender/Media is programmed to print a customer receipt (for an entire Property), but some RVCs can override that setting by enabling the RVC Parameter option bit, "On Demand Customer Receipts". The chart below explains the printing behavior based on the option bit settings.



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- 1 Printing Matrix
  - 1.1 On Demand Enabled
  - 1.2 On Demand Disabled
  - 1.3 Matrix Notes
- 2 Best Practices
- 3 See also

Printing Matrix

On Demand Enabled

The following table demonstrates what occurs when the RVC Option Bit "On Demand Customer Receipts" is enabled.

Tender Media Option Bit: "Print Customer Receipt"	Fast Transaction Result (Customer Receipt)	Receipt Prints after [Print Customer Receipt] function key
ON	Receipt Will Not Print	Yes
OFF	Receipt Will Not Print	Yes

On Demand Disabled

The following table demonstrates what occurs when the RVC Option Bit "On Demand Customer Receipts" is NOT

enabled.

Tender Media Option Bit: "Print Customer Receipt"	Fast Transaction Result (Customer Receipt)	Receipt Prints after [Print Customer Receipt] function key
ON	Receipt Will Print	No
OFF	Receipt Will Not Print	Yes, if the RVC Parm Posting/Control bit **[Allow "Print Customer Receipt" after non-printing Tender/Media]** is enabled

Matrix Notes

All information in these two charts assume that:

1. The operator option bit "On-Demand Printing" is enabled.
2. The operator option bit for Pop Up is disabled.
3. The workstation Option Bit “Do Not Clear Screen After Transaction” is enabled.
    - The setting of this option bit is actually irrelevant when "On Demand Customer Receipts" for the RVC is enabled: The workstation will function as though this workstation option is enabled, regardless of the EMC setting. This is necessary so the operator has a chance to use the **[Print Customer Receipt]** function key.
4. A **[Print Customer Receipt]** function key is programmed on the default transaction screen.
5. The transaction is a fast transaction. (Customer Receipts print for Fast Transactions, guest checks print for all other transactions.)

Best Practices

For general database programming, the following steps are generally the best configuration options:

- Tenders should always be configured with **[Print Customer Receipt]** enabled
- Revenue Centers should be programmed with the **[On Demand Customer Receipts]** option set to disabled.

With this configuration, receipts always print based on the Tender/Media configuration; if a Revenue Center requires that receipts only print after a transaction per customer request, the "On Demand Customer Receipts" option should then be enabled.

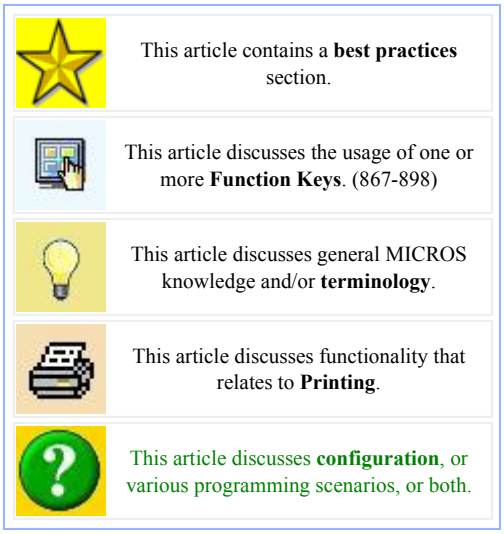
See also

Check and Receipt Printing	By-Round Guest Check ・ Guest Check Headers and Trailers ・ **On Demand Customer Receipt** ・ On Demand Guest Check ・ Print Customer Receipt
Learning series: Check and Receipt Printing	

Order Device Redirection

The term **Order Device Redirect** means that a printer will *redirect* an order to another Order Device. When order device #1 is "redirected" to order device #1, this means that orders sent to order device #1 will print at the physical printer programmed for order device #1. (This is "redirecting to itself".) If order device #1 is redirected to order device #2, orders set to order device #1 will print at the physical printer programmed for order device #2.

Order Devices can be redirected in EMC's Order Device module, via the Order Device PMC Procedure, or by using the order device redirect function keys.



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- 4 Note
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Backup vs. Redirect

Backup

An order device has a "Device" field, and also a "Backup Device" field. It is fairly obvious that the Backup Device is used to *back up* the primary device. So, the following happens:

1. An order is sent to this device
2. The device cannot be reached (it is broken or powered off; or the network is down to that device)
3. The order prints to the **Backup Device**

Redirect

An order device has a "Order Device Redirect" field also. In this field, the options are to select one of the 32 order devices in the RVC where the order will be sent. The field can also be set to 0, which means that orders sent to that order device will not print anywhere!

- **Please tell me what this means!** - To explain what an Order Device Redirect field is, you need to first know how it is configured, then you'll have an idea.
- **Typical Configuration** - Typically this field is set "to itself," meaning that Order Device #1 will be "Redirected" to Order Device #1, and Order Device #2 will be "Redirected" to Order Device #2, etc. However, there are times when this field may hold a different value.
- **Finally: Why we have Order Device Redirection** - This field is often used as a "Permanent Backup." For instance, let's suppose that Order Device #3 is the Pizza Printer, and the power outlet for this printer has become non-functional. Being aware of this situation, a programmer can set the Order Device Redirect for the Pizza Printer to "Order Device #1", which is the Hot Printer. This way, any time a pizza is ordered, the Order Chit will automatically print to the Hot Printer, instead of attempting to print to the Pizza Printer. Check out the flow of redirection, and see how it differs from "backup":
    1. An order is sent to this device
    2. Instead of attempting to print to the device programmed as the "Device", the print job will instead print immediately to Order Device #1.

To summarize this section, you can see that the system didn't waste time trying (and then failing) to print before printing at the other printer — it just printed right away.

Function Keys

Function keys 867-898 correspond to Order Devices 1-32. These keys allow a user to quickly redirect order devices. These keys can be used in one of two ways:

Function Keys 867-898 were introduced in Simphony 1.0 Service Pack 7.

- Press the **[Redirect Order Device #]** key, then the number of the order device where orders will print (0-32), then **[Enter]**
- Press the number of the order device where orders will print (0-32), then press the **[Redirect Order Device #]** key

Often, these keys are used as part of macros. Some sites routinely redirect order devices (perhaps at closing time, all kitchen order devices redirect to the same printer), and thus implementing these keys as a macro saves operational time for the RVC. For more information, see Macros: Redirecting Order Devices.

Note: *These keys can be used while in a transaction, however in most cases a site should program these keys so that they are not accessible from transaction screens unless there is a logical business reason to do so.*

Best Practices

If the Order Device Redirect field is set to 0-No Output, there will be no Order Device Output. In some good databases, every Menu Item Class is programmed so that printer failures are not a big deal:

1. The Menu Item Classes are all set to print to Order Device #4, which is a Local Order Receipt device.
2. Order Device #4 is redirected to 0-No Output.

If all the printers fail (because a printer controller failed or the network went down), a smart manager can redirect Order Device #4 to Order Device #4, and then all orders will print to the Local Receipt printer. This way, the order prints immediately to the server at the workstation, who can then physically take the order chit to the kitchen or bartender for preparation. See Local Order Receipt for more information.

Note

Because the Order Device Redirect field changes the *physical printer* where an order prints, there is no double-redirecting. Consider this situation:

- Order Device #2 is redirected to Order Device #3
- Order Device #1 is redirected to Order Device #2

In this scenario, order device #1 will not redirect to #3. There is no "double redirection". When order device #1 is redirected to order device #2, it will print at the physical printer programmed for #2.

Order Device Routing by Order Type Setup

This article discusses the steps that are required for configuring Order Device Routing via Order Types.

Contents

- 1 Overview
- 2 Configuration
  - 2.1 EMC Configuration
    - 2.1.1 Order Type Parameters
- 3 See also

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony v2.4.

This article discusses **configuration**, or various programming scenarios, or both.

Overview

There is now a way of routing Order Device output via the configuration of Order Types. If enabled, Order Device output can be sent to up to 32 specific remote devices based on an Order Type such as 'Take Out', 'Room Service' or 'Delivery' etc. If this feature is not enabled, Order Device programming and output remains the same as in previous versions. The option that enables this capability can be found in the EMC-> Setup tab-> Taxes and Order Types-> Order Types Parameters->

[8 – Enable Routing Order by Order Type].

This option's Context Sensitive Help (CSH) reads as follows;

> *Select this option to control order routing by order type. The workstation order devices must be set for all possibilities and use this as an override to disable order devices.*

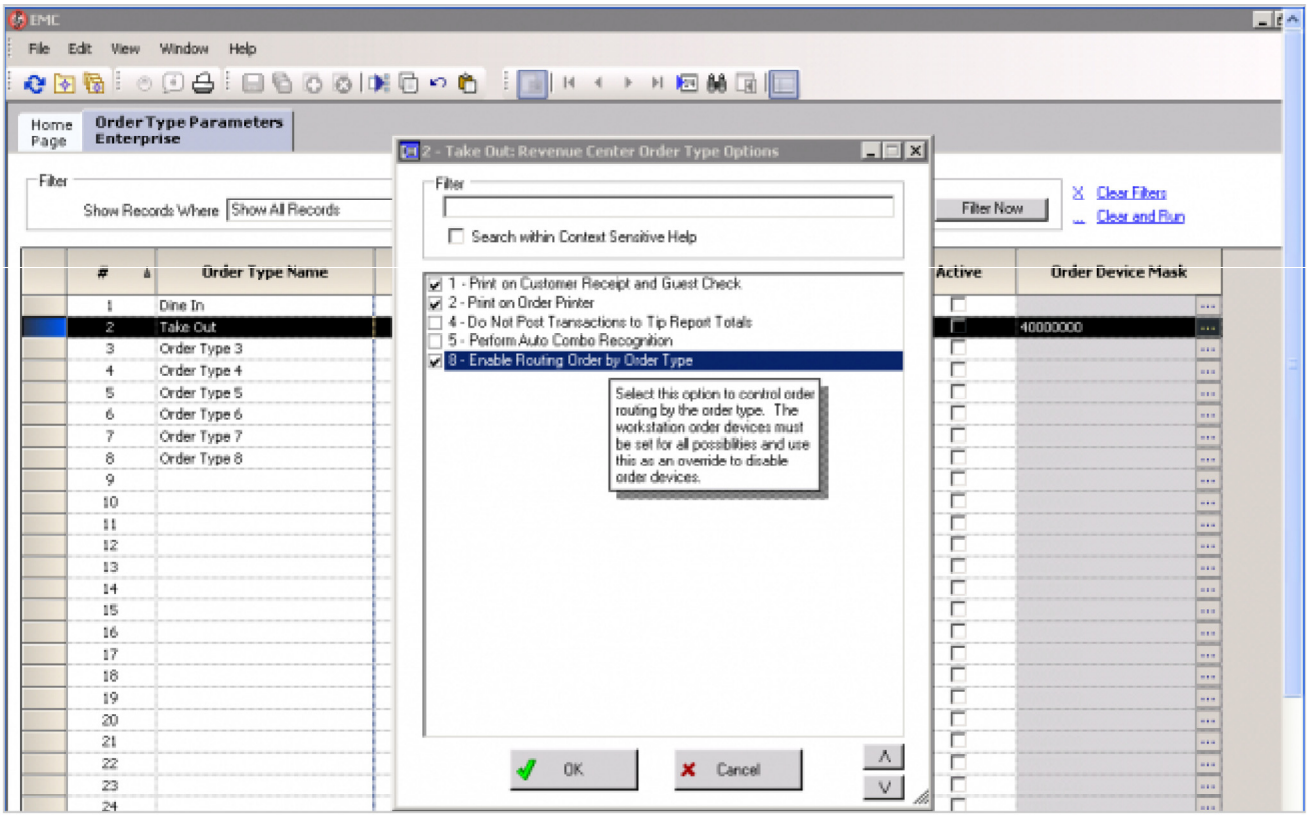
Configuration

EMC Configuration

Order Type Parameters

To enable Order Device output by

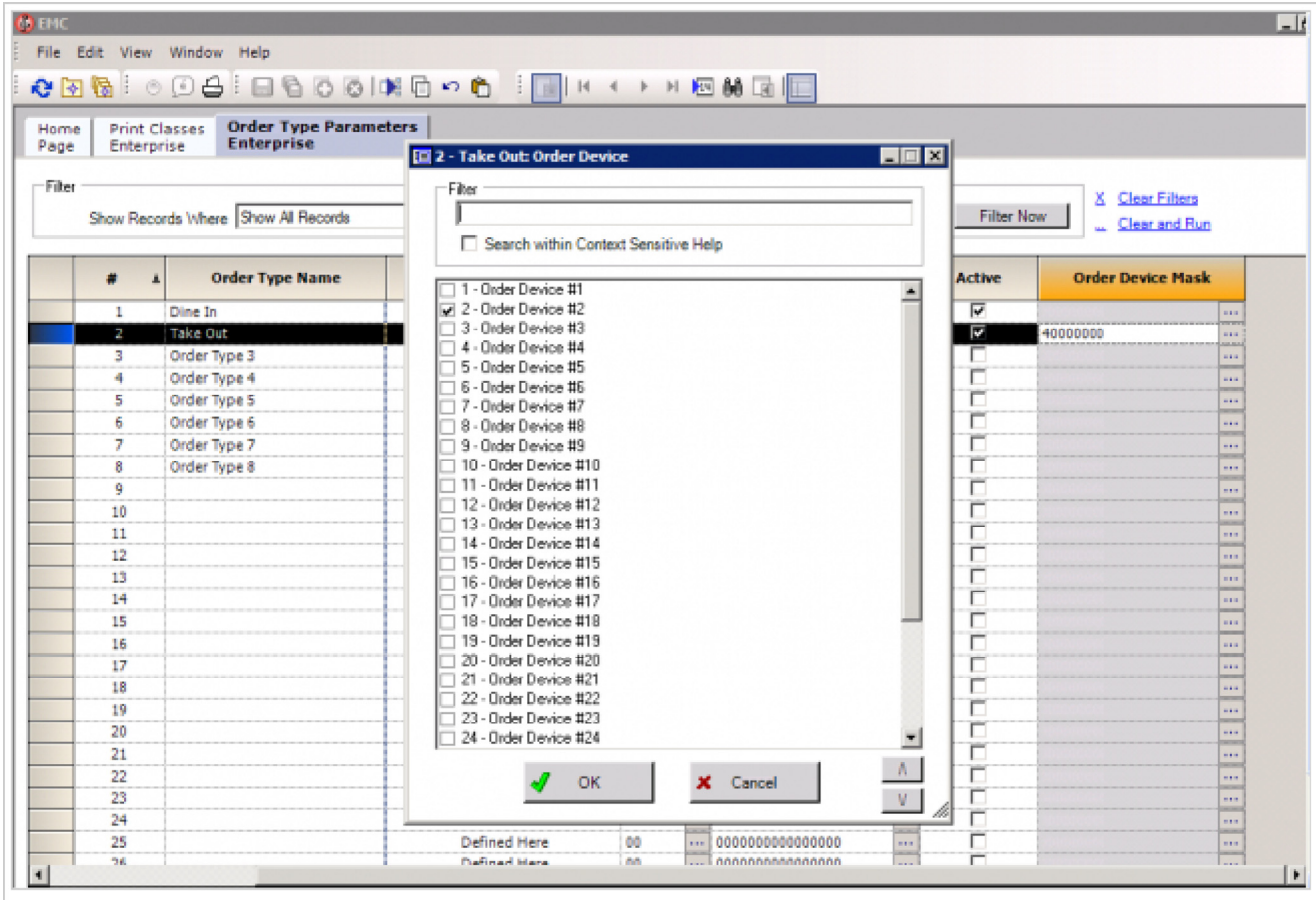
Order Type, enable option 8 and **'Save'** the change. In the example shown here, the **'Take Out'** Order Type will have its output



Order Type Parameters-> Option 8

determined by the selections made in the **'Order Device Mask'** column.

When the enabling of option 8 is saved, the same file's **'Order Device Mask'** column will be



Order Type Parameters-> Order Device Mask column

'activated' and users will be able to select the desired Order Devices that will serve as that Order Type's printer or KDS. After selecting the desired Order Devices click the '**OK**' button and '**Save**' the changes.

- Ensure that from the Workstation module that all of the required Order Devices are enabled for each client that will be placing specific Order Type orders. In this instance, '**Take Out**' orders will minimally require Order Device #2 to be enabled from the '**Order Device**' tab of the Workstation(s) file.

Again, if option '**8 - Enable Routing Order by Order Type**' is ***not*** enabled, Order Device programming and output remains the same as in previous versions.

Order Chit

In most cases, the term **Order Chit** refers to a piece of paper that displays orders on an order device output printer. For example, when a waiter rings in a chicken sandwich and a steak dinner, these items typically print to a printer in the kitchen. The piece of paper that actually displays the items is the "order chit."

The term may also be used to describe the chits that display on KDS Displays.

This article belongs to the MICROS **Important concepts** category.

Page Design Best Practices

This article contains information pertaining to the best practices that should be used when designing and configuring pages using the Simphony v2.x Page Designer. As Simphony v2 continues to evolve and mature, this article will be updated with the latest information that is available. Following these recommendations will help to ensure that system performance will remain optimal and also help with the long-term maintenance of the pages.

Contents

- 1 Introduction
- 2 Legacy Touchscreen Model
- 3 Page Design Model
- 4 Touchscreen vs. Page Configuration
- 5 Best Practices
  - 5.1 Page Design Model Philosophy
  - 5.2 Page Maintenance Best Practices
    - 5.2.1 Keep Number of Pages to a Minimum
    - 5.2.2 Use Visibility Options to Avoid Creating New Pages
    - 5.2.3 Use Standard Windows Functions Keys to Copy Objects
    - 5.2.4 Use Static Content Areas for Frequently Used Keys
    - 5.2.5 Override Content Areas at the RVC Level
  - 5.3 Performance Best Practices
    - 5.3.1 Remove All Unused Pages
      - 5.3.1.1 Header Records
      - 5.3.1.2 Enterprise Level Records
    - 5.3.2 Use the Least Number of Grid Rows and Columns Necessary in Content Areas
- 6 Other Performance Best Practices

This article contains a **best practices** section.

This article belongs to the MICROS **Important concepts** category.

This article relates to general EMC functionality or knowledge.

This article discusses a **technical topic** that is not intended for all readers.

Introduction

This section discusses the evolution of the Page and how things are different between the Simphony v2 Page model and the Touchscreen model that was used in previous generations of MICROS products.

Legacy Touchscreen Model

In previous MICROS products like Simphony v1.x or 9700 HMS, it was common practice for a site to have numerous touchscreens. A Revenue Center would typically have upwards of 15 to 20. There are many reasons that so many touchscreens were required in the previous products. Some of these reasons are listed below:

- Limited space for programming buttons
  - Templates for the 9700 Winstation client supported 60 buttons on a 6 x 10 grid
  - Templates for the 9700 SAR and Simphony v1.x clients are limited to 5 templates
- Screen Look Up (SLU) content was limited to the space left blank on a touchscreen
- Header screens were added by programmers as place holders to group like screens
- A touchscreen was still limited to a single “grid” of buttons on it
- Different touchscreens were needed for what class the employee belonged to

Another requirement from the touchscreen model was to implement buttons on each screen which would tell the Ops client which screen needed to be next. The screen flow was very tightly tied into the current OPS client state. As a result of this tight integration, it was very hard to customize the look of the screens.

Page Design Model

One of the cornerstone features in the first Simphony v2 release was a new Operations Client that featured a fresh, new User Interface (UI). The term "Page" is used when describing the Simphony v2 client UI to differentiate it from the "Touchscreens" that are used in previous products. While the touchscreen model has been very successful, the page model was introduced to overcome many of the limitations that had been seen in the touchscreen model.

For instance, the touchscreens offer very few options for customers that want to invest in creating tailored ordering experiences. Simphony v2 ships with standard templates that are designed to meet the operational requirements for the general market. However, customers that are willing to invest in creating non-standard, customized ordering experiences can leverage the UI technology used by the standard templates to create custom templates. These customizations can include operation specific workflows or incorporate data elements which they have added to the system. Even with the UI customizations, core POS business rules like discount applicability, condiment handling, and menu item availability can still be enforced even though the visualization is different.

Another difference between the models is that Pages offer the ability to navigate within themselves. Touchscreens are linked together to create a workflow and resulted quite often in having 20 - 30 touchscreens in a single revenue center. A single page can have multiple "touchscreen areas" in it that contain different items, discounts, functions, etc. within them. This functionality allows for a single page to take the place of many touchscreens. The design tool used for the pages presents the information in a fashion that is similar to the client itself, allowing the person that is configuring the system to navigate through the configuration using the same buttons in the UI as the user does on the client itself.

To summarize, some of the design goals of the page model included:

- Offer more customization options to reduce the reliance upon core engineering to deliver account specific requirements
- Allow for a flexible workflow model
- Reduce the number of pages that needed to be managed
- Create a configuration experience that was closer to use end user experience

Touchscreen vs. Page Configuration

The creation and management of Pages is done through the Page Design module within the Enterprise Management Console EMC. This module is completely separate from the Touchscreen Designer that has been used in the past. There are many differences between these two modules, which are a result in large part of the differences between Pages and Touchscreens in general.

One of the most noticable differences between the Designers is that the Page Designer presents the user with a "What You See Is What You Get" (WYSIWYG) experience. The tool shows the check detail area, the "navigation buttons", and allows the user to reconfigure the template around the button areas. Whereas, the Touchscreen Designer only allows the user to see and manipulate the grid onto which the buttons are placed.

With the Page Designer, one can manipulate the template that the buttons are being placed onto. Elements like navigations buttons and tabs, visibility of certain areas, and the content shown in the check detail area are just some of pieces of a template that can be modified by the user. In the Touchscreen Designer, the only options were to place buttons onto the grid where they belong. There is no ability to modify the surrounding template in any way.

Best Practices

The following sections describe the best practices outlined by engineering for configuring pages in Page Design in Simphony v2.x. This section is split into two different sections – Maintenance and Performance. The best practices outlined in the maintenance section are geared towards long-term management of the system. The best practices outlined in the performance section are geared towards how poor Page Design can affect Workstation performance.

Page Design Model Philosophy

Before best practices are covered, the following bullets highlight the philosophy behind the implementation of Pages and how they were intended to be used.

The number of Pages will be kept to a minimum

- Fewer Pages means less to maintain

Navigation will be built into a Page

- Eliminates the need to create pages dedicated to the same thing and eliminate needing to use "next screen" keys everywhere
- Pages will be able to support multiple content areas (places where buttons can be arranged)

Navigation within a Page will never change

- Pressing the "Drinks" navigation button will always take you to the drinks area of the Page

There is no need to leave the Page Designer to configure a page

- SLU styles were separate modules for previous products
- Template modification is done through Page Designer

Duplication of Pages for varying employee roles can be eliminated using visibility attributes within a Page

- Navigation Buttons and Tabs can be hidden by a variety of conditions including Employee Class
  - The same page can be used for both Managers and Servers
- Visual States can be used to control the items that appear within the SLU controls
  - Think of SLU screens configured to show modifiers A-D, E-H, I-N, etc...

Page Maintenance Best Practices

The following recommendations should be used to make the management of Pages as easy as possible.

Keep Number of Pages to a Minimum

Keeping the number of to as few as possible makes it much easier to manage the Pages.

- Since it is possible to navigate within a Page, consider how to add additional tabs and items to the Page before creating a whole new page to do something.
- Do not create header records within the database

Use Visibility Options to Avoid Creating New Pages

There are three major visibility controls that can be used to help eliminate the need to create new pages:

- **Visibility Conditions** - applies to navigation items and tabs
- **Visual States** - applies to navigation items and tabs, as well Screen Look Up (SLU) controls
- **Smart Keys** - buttons whose functionality changes based upon certain conditions

Using these three features can eliminate the need to create new Pages. For instance, if there is a need to have a page which has a set of buttons to be used by managers that servers cannot access, create two separate tabs and make them visible based upon the employee class of the signed in employee. That way, the tab with the manager buttons only appears when the manager is signed in.

Use Standard Windows Functions Keys to Copy Objects

Within Page Designer, a user can use the following standard Windows Functions to copy data to the Windows Clipboard and manipulate the screens:

- Copy (ctrl-c)
- Cut (ctrl-x)
- Select All (ctrl-a)
- Mutli-select (hold ctrl down and click on different elements in a content area)
- Paste (ctrl-v)

Objects that have been copied or cut can be pasted into many different locations:

- A different content area in the same Page
- A different content area in the same instance of EMC
- A different page in a different instance of EMC
- Into an email, and send them to other users who can paste them into their own Page
- Into a text file and save it
- Into a Clarify case note (instead of or in addition too a screenshot of the button)

These last two examples can be very useful when trying to provide support to customer. The information shows exactly what the configuration of the button is.

Use Static Content Areas for Frequently Used Keys

The main templates include static content areas that do not change when the navigation items and tabs are selected. The same keys are present on many of the content areas, considering moving them to a static area. Using the common areas adds uniformity and avoids duplication of effort.

There are four of these areas that can be enabled as necessary:

- Left of Detail Area
- Right of Detail Area
- Right of Content Area
- Bottom (enabled by default)
- Top content areas to place frequently used keys

The width and height of these content areas can be made larger using the Configuration tab. Increasing the size of the areas can be useful for adding room for additional buttons. If a static area is no longer required, then simply delete the buttons from it and go back to the Configuration tab and hide it.

Override Content Areas at the RVC Level

Content areas can be overridden at the RVC level. Consider the following use case:

- You have a shell page defined at the enterprise that is completely filled out except for some revenue center specific area.
- At each revenue center you override the content area.
- Edit the page at the revenue center. All enterprise-level content areas are read-only except for the overridden ones.

- Now you can add content specific to that revenue center in that content area.

If there are just a few RVCs the maintenance savings are reasonable. If there are hundreds or thousands of RVCs then the savings in maintenance costs are enormous.

Separate custom resource dictionaries for each different theme.

- Don't mix and match different themes and styles within the same dictionary because it is hard to find where the styles are defined
- Mixing and matching often leads to loading a lot of styles that are never used in a system and thus create configuration clutter
- An unlimited number of dictionaries can be used within a system, so don't feel compelled to mush them into a single location

Performance Best Practices

The Simphony v2 client is supported on a wide range of hardware that has vastly different graphics and performance capabilities. When implementing Pages, it is necessary to take into account what the lowest level of hardware is going to be in the system and optimize the page configuration for that device. The amount of content that can be displayed efficiently on a Core i5 MICROS PC Workstation 2015 is vastly different from what can be shown on a MICROS Workstation 4LX.

These recommendations will help to ensure that the page configuration will run as efficiently as possible for all platforms.

Remove All Unused Pages

Each page that is available within a revenue center is loaded into the OPS client memory at start up. It does not matter if the page has any buttons or not, it will get loaded and take up memory and increase the start up time of the client. Removing any unnecessary pages will cut down on the client start up times tremendously.

Header Records

In previous generations of MICROS products, it was quite common to create a database filled with header records in the tables that segmented touchscreens into different categories (i.e., sign in, ordering, bar, food, etc.) These header records would typically contain no button data within them, but allowed for someone to quickly locate a touchscreen somewhere in the long list of available screens. In Simphony v2.x, each of these header records are loaded into memory and parsed by the OPS client. This operation is time consuming, and on workstations with less powerful hardware take resources that can be better spent elsewhere.

Enterprise Level Records

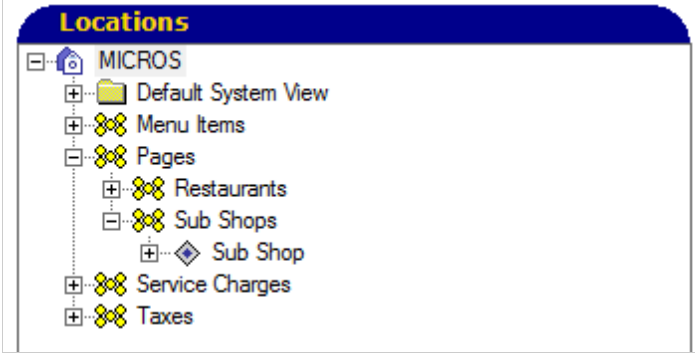
The ability to create a record at the Enterprise and have it be inherited into every revenue center in the system is a powerful mechanism that can yield great benefits when used wisely. For items like menu item masters, tender media, and discounts defining global records can ensure data consistency within the reporting structure and ease much of the configuration burden when expanding new properties or revenue centers.

#	Name	Zone/Location	Inheritance Type	Template Type	Template
1	Sign In	Enterprise	Inherited	Internal Template	Blank Template
2	Home	Enterprise	Inherited	Internal Template	Tabbed (Top Navigation Bar, Large Detail Area)
3	Transaction	Enterprise	Inherited	Internal Template	Tabbed (Top Navigation Bar, Small Detail Area)
11	Custom Sign In	Enterprise	Inherited	Database Template	
12	Custom Transaction	Enterprise	Inherited	Database Template	
21	Curved Sign In	Enterprise	Inherited	Database Template	
22	Curved Transaction	Enterprise	Inherited	Database Template	
31	Mobile Sign In	Enterprise	Inherited	Internal Template	Blank Template
32	Mobile Transaction	Enterprise	Inherited	Internal Template	Tabbed (Top Navigation Bar, Large Detail Area)
33	MobileVideo	Enterprise	Inherited	Database Template	
41	Sub Transaction	Property: 4 - Sub Shop	Defined Here, No Override	Internal Template	Tabbed (Top Navigation Bar, Small Detail Area)
101	Bow Tie	Enterprise	Inherited	Internal Template	Blank Template

Example of Inherited Pages

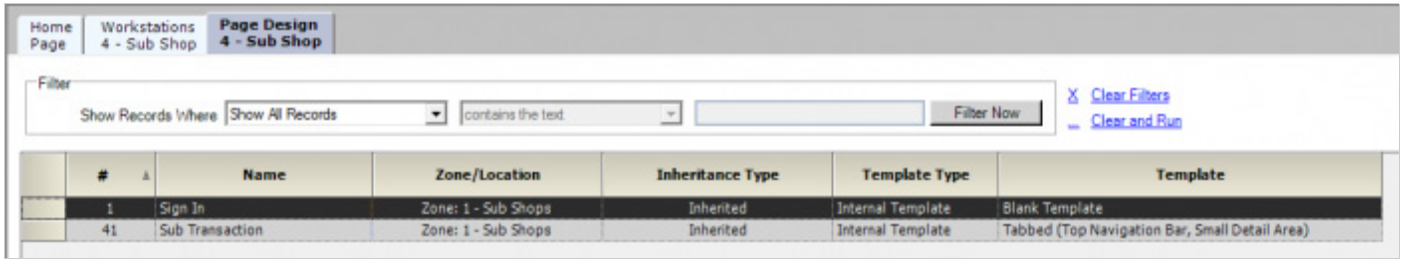
However, when used with pages, this can lead to large numbers of unnecessary pages being loaded into revenue centers that don't require them. Take for example the property whose Page Design record list looks like the one in this picture. It can be seen here that there are 12 pages in the property. Of those 12 pages, one is defined at the property (Sub Transaction) and the rest were inherited from the enterprise. In reality, the property only needs a total of 2 pages (#1 - Sign In and #41 - Sub Transaction).

This means that with the current configuration, the workstations at that property are not only loading 10 unnecessary pages when they start up - which again, increases the client start up time and the amount of memory used by the client - they are also receiving database updates for these pages that will never be used. The database updates result in additional WAN utilization and client processing time to apply the unnecessary updates to the local datastore.



Zones Created to Manage Pages

The Zones feature was implemented to assist with this type of issue. To rectify the situation, the pages should be analyzed to see which ones are common across the different properties and revenue centers. Once that has been done, a set of zones should then be implemented which allow for the distribution of the screens to the right locations in the hierarchy.



Pages Just for the Sub Shop

In this particular system, a user interface zone was created, and then beneath that are two more zones - one for the Sub Shops and one for the Restaurants. The Sub Shop includes the Sub Shop property, and all of the other properties are located in the Restaurants zone. The Distribution tool was used to copy the login screen (#1) to the Sub Shop zone from the enterprise and the transaction screen (#41) from the Sub Shop property. The remaining screens were then all moved to the Restaurants zone.

The final screenshot shows that the Sub Shop has only the two screens that it requires. When a new Shop Sub location is added to the system, that property will be added to the Sub Shop zone so that it automatically inherits the configuration of the screens.

Use the Least Number of Grid Rows and Columns Necessary in Content Areas

If a system is already configured to have grids that are larger than 24x24, then an attempt should be made to shrink them down. The same process for increasing the grid size can be used to reduce the size of the grid as well. Simply right click within content area where no buttons are defined and choose the Change Size... option in the menu. In the Change Grid Size form, set the Rows and Columns down to 24x24 and select OK. Acknowledge the message from EMC which states that it will attempt to resize the existing content. Look at the results and clean up the page as necessary.

UI Grid Set to 48x48

The screenshots shown in this section demonstrate the before and after effects of reducing the grid size from 48x48 to 24x24. It can be seen that there is very little visible impact to the screen configuration area with the reduced grid size.

UI Grid Set to 24x24

Other Performance Best Practices

Remove unwanted resources or target unwanted resources to ‘nothing’.

- Every image, every resource dictionary increases startup time and uses up unwanted memory.
- Don't load unnecessary styles onto clients (For instance, don't load the Brew House buttons into a system that will never use them because the styles will be loaded just in case they get called one day)

Before permanently hiding an area (config tab, uncheck “Show left of detail”, etc.) delete anything on that area first

- The system will still try to draw those objects ever though the area no longer exists

Use targeting to send images and other content to only those devices that require it

- This functionality will be very helpful with the really slow devices like handhelds.
- Don’t send videos and large images to handhelds or any client that does not require them

Use Visual states, menu levels, and smart keys to simulate multiple pages and eliminate the overhead of switch pages

- Switching between navigation buttons is much faster than switching between Page records
- If you can put everything on one page and have entire sets of navigation change based on state then ‘page switching’ is faster (food to retail, for example).

Reduce the number of condiment orderers within a Page to the bare minimum

- Ideally, a maximum of 1 condiment orderer (2 if combo meals are also used) will be part of a page to prevent the need for OPS to update every condiment orderer (whether visible or not at the time) when the selected item in the check detail in changed
- Use the menu item class option to flip to the condiment orderer screen automatically when the item is selected in the check detail area (either by choosing the item or when it is added to the check)

Page Design

Page Design *for Simphony 2x is the EMC module where a programmer configures the content of a page's display for the use of touchscreen keys and navigational tabs on a workstations touchscreen.*

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony v2.1.

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Page Designer for Simphony 2.x Perspective

The extensible client in Simphony v 2.1 introduces a new architecture for building and navigating the Point of Sales (POS) Workstation client display. The **'page'** metaphor is now the only way of programming the operator interface. While the building of pages seems very different than touchscreens, at heart it is a streamlined way of bringing old ways into a new exciting package.

Touchscreens

In previous MICROS products, 2700, 3700/RES, 8700, 9700 and Simphony v1.x, the programmer would configure individual touchscreens for a revenue center. Some of the limitations of the products (though not necessarily limitations of the architecture) were:

- Since buttons served a dual purpose, functions and navigation, it could be difficult to determine what a button did just by looking at it.
- Only buttons could be placed on the screen. Through the use of clever programming image-only buttons could be programmed to simulate a banner.
- The map of touchscreen navigation within any given revenue center (the connections between all of the next/previous screen buttons) could only be discovered by trial-and-error on a client. The navigation for a revenue center with 200+ touchscreens could be difficult to understand for a programmer, impossible for an operator, and be frustrating for training purposes.
- Sometimes it was desired to have the same buttons appear across multiple touchscreens for example, **void** and **transaction cancel**. The only way to accomplish this was to duplicate the keys across all desired touchscreens. This could involve a lot of programming effort and was easy to get **'out of sync'**.
- There was no way to group buttons together by function other than button style.

Pages & Page Templates

Pages are similar to touchscreens in that both require templates. While touchscreen templates are very static, page templates allow the user to customize the page in a myriad number of ways. One can categorize the page templates into one of these three types:

1. Classic templates (these correspond to similar Simphony v1.x touchscreen templates and mimic the behavior of a Simphony v1.x client to some degree)
2. Blank templates (used for customized pages or typically a Login page)
3. Tabbed templates (used for Signing in and Transaction states)

Our discussion of templates will focus on the tab templates as they introduce the greatest amount of functionality. A tabbed template is what it sounds like: the user can configure multiple tabs on the display. The number of tabs and sub tabs that can realistically appear on a given page is about 50. Each tab and sub tab contain up to 50 or so buttons. The ability to place such a large number of buttons on a single page yields a database model where a programmer should have to program only a handful of pages for any revenue center.

Page Design Overview

Touchscreen configuration in Simphony v2.x is performed by using the newly designed and implemented Page Design module. This new module is to be used specifically for v2.x Ops clients. The tabbed Page model was designed to eliminate most of the issues with touchscreens, present old ideas in a new way, as well as introduce a variety of new functionality. Pages differ from touchscreens in the following way:

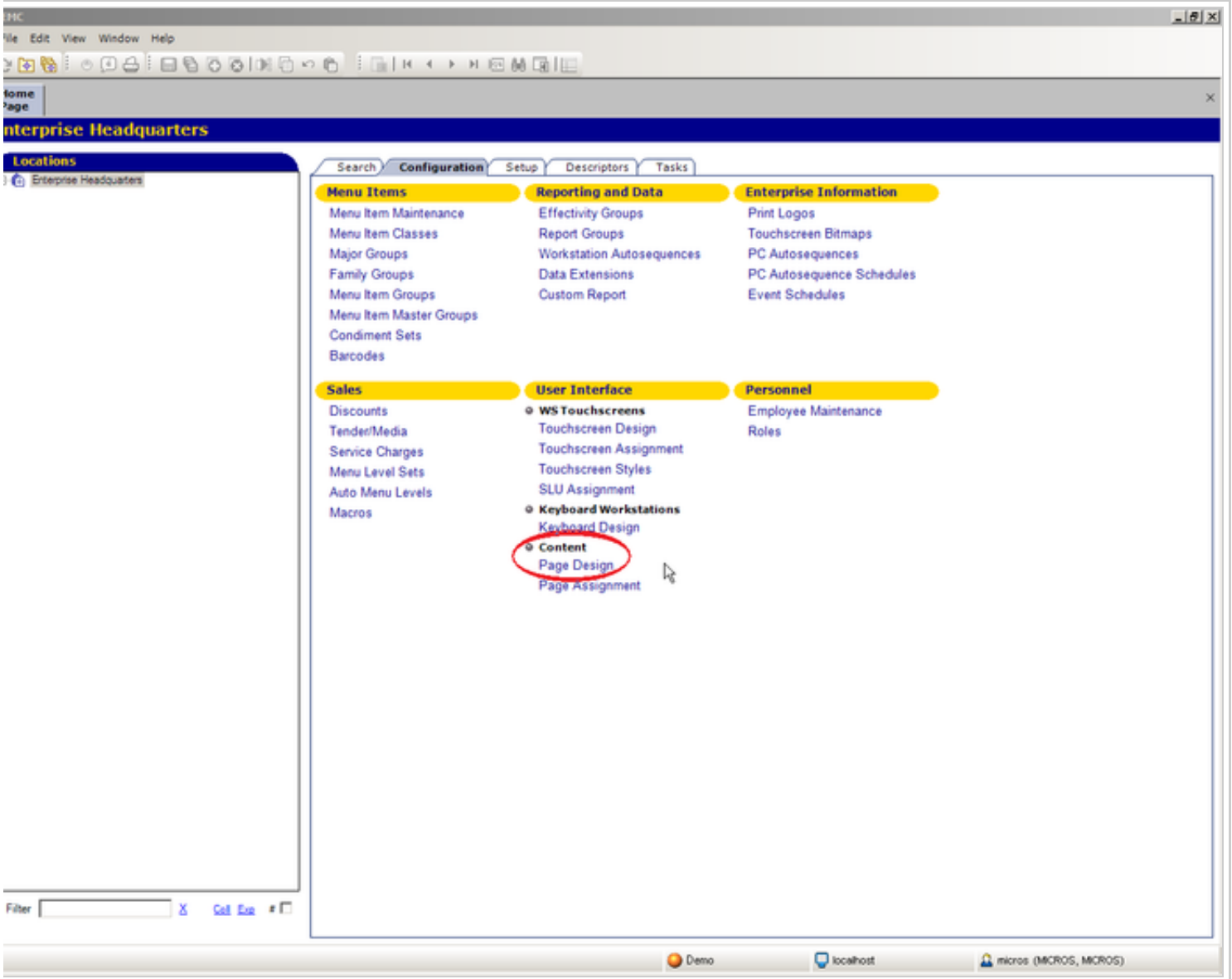
- Pages can contain not only buttons but other more sophisticated content such as Dining tables, SLUs, Numeric entry areas and background panels for highlighted groups of controls.
- Navigation on a page is consistent from page to page (the navigation bar and sub tabs). All buttons performs a function; a tab is used for navigation. This can reduce training costs as it makes the navigation immediately discoverable.
- Programmers can turn various elements on a page on or off. For example, it may be desired for the Sign in page to turn off the detail area as a check has yet to be started.
- Programmers can configure which tabs will appear on that page. The tabs are not built into the template.
- The content displayed by a page can be dynamic based on the current Menu Levels, Serving Period, Employee Class, or other criteria. For example, it is possible to display a **Manager Functions** tab only if the manager is assigned to one of three manager employee classes.

    - Perhaps the most key feature is that client templates are ***fully*** integrated with the EMC (via the Page Design module). The EMC is aware of all client templates and allows the programmer to edit pages in a what-you-see-is-what-you-get manner.

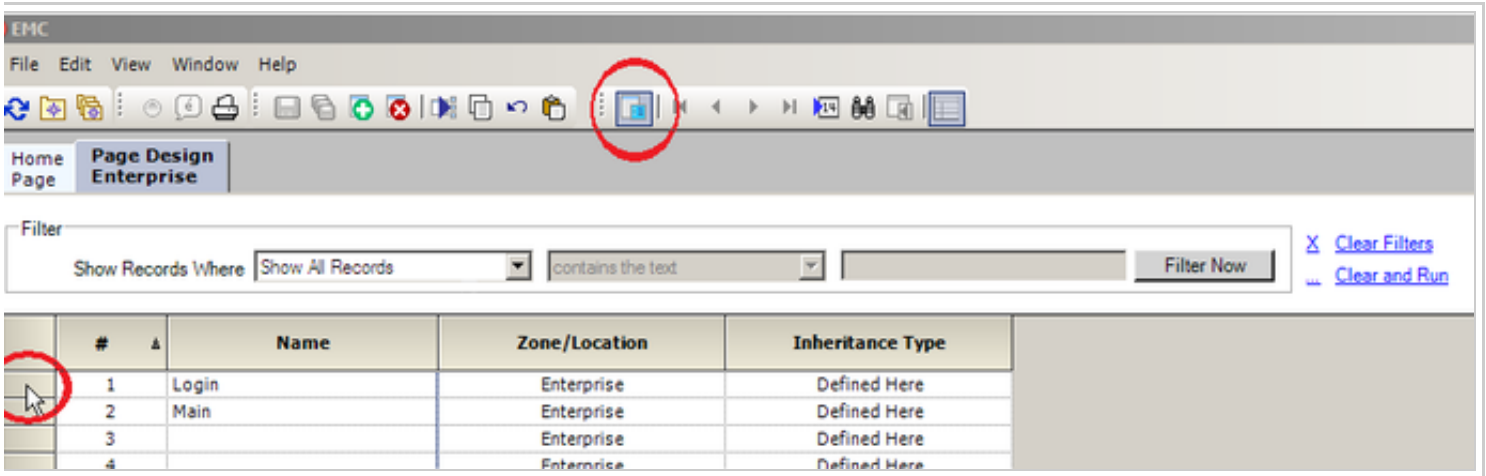
Using the Page Design module

To use the Page Design module, click on the level of the Enterprise where you wish to configure the touchscreens. For this document all Page Design functions will be performed by accessing the Page Design module from the Enterprise level.

- At the Enterprise level, select the **Configuration** tab. The **Page Design** module is located under the **User Interface** section, below the **Content** header.



EMC's default Configurator - Main Page



Page Design - Main Page

- Once fully open, pages will be displayed in table view. Open one of the pages to configure by either double-clicking the gray box to the left of the record number or by clicking the view toggle button in the middle of the tool bar.

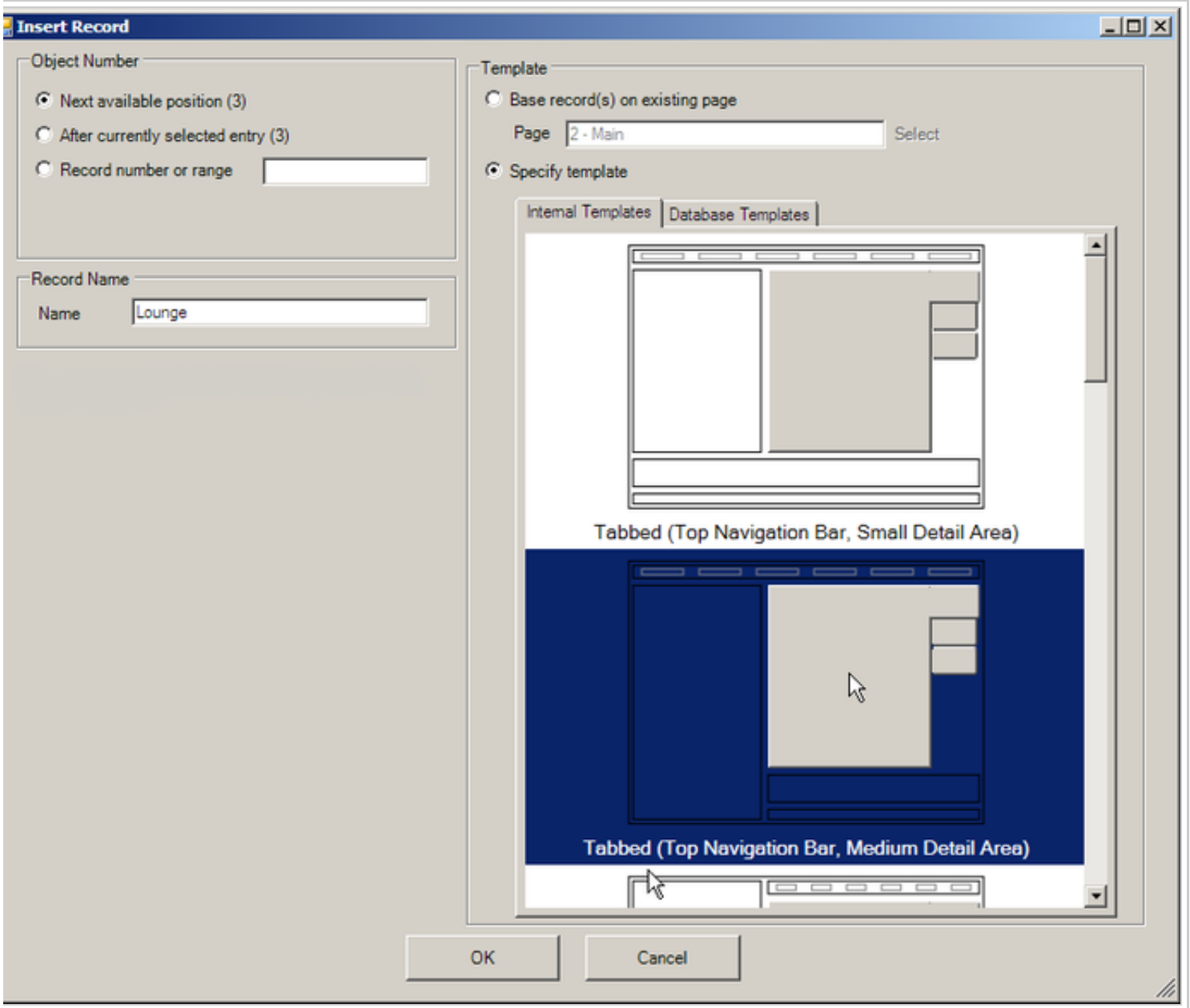
EMC Toolbar

The main EMC tool bar is located at the top of the EMC window. For a description on each of the buttons on the tool bars reference the EMC article.

Inserting a new Page

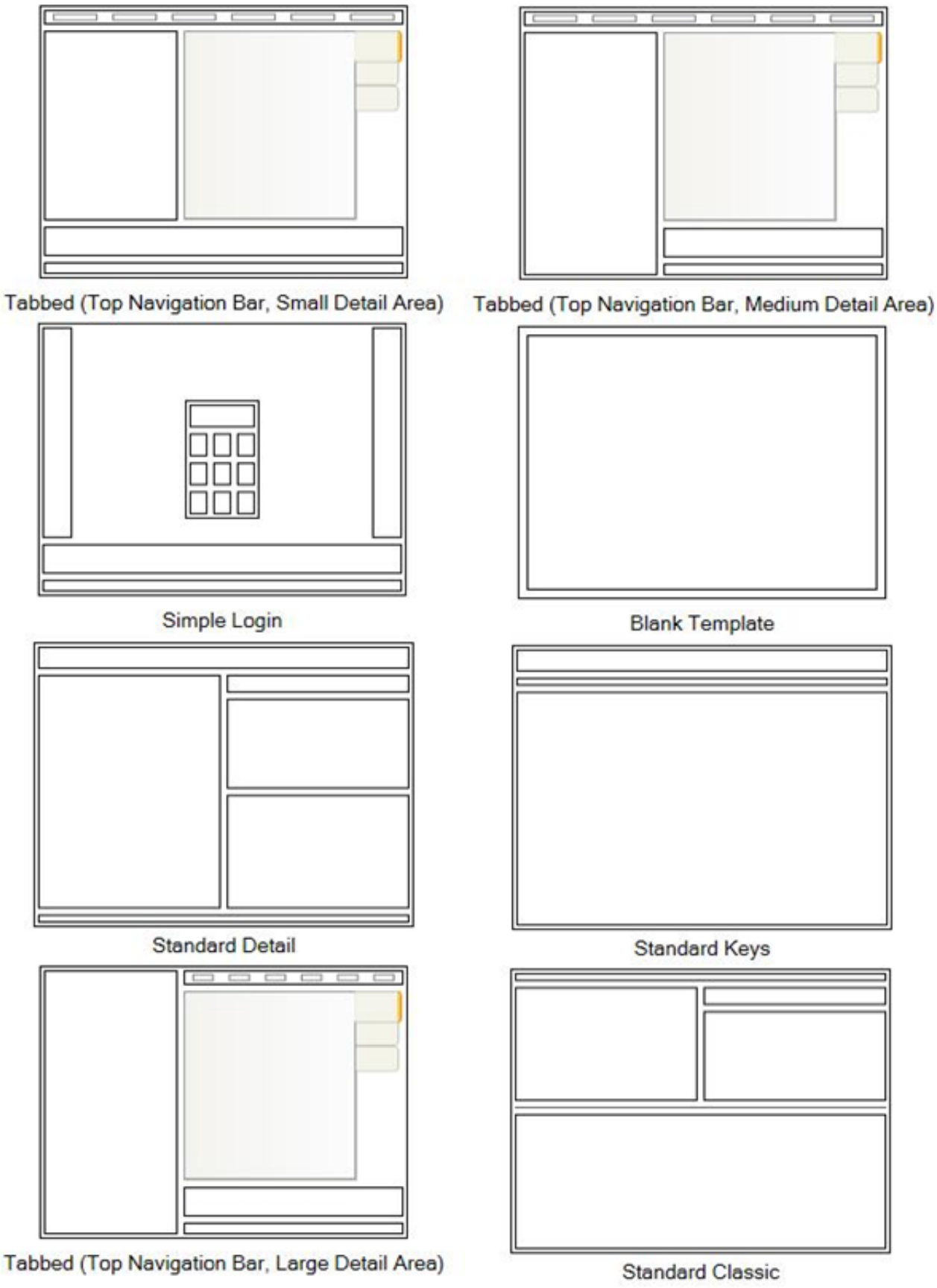
To insert a new page, click on the green plus sign that serves as the Insert button in the middle of the EMC tool bar. This will bring up an ‘Insert Record’ dialog box where you can specify the record number, name and template option for the new page.

- From this form, User's have several pre-configured templates to choose from to include a ‘blank’ template where a custom template may be configured such as a Login page.



New Page Insert Record

As shown here, there are two main categories of templates: **Tabbed (dynamic)** and **Standard (static)**. There are numerous templates to choose from, particularly in reference to the amount of space allotted for check detail and the potential placement of functional and navigational tabs.

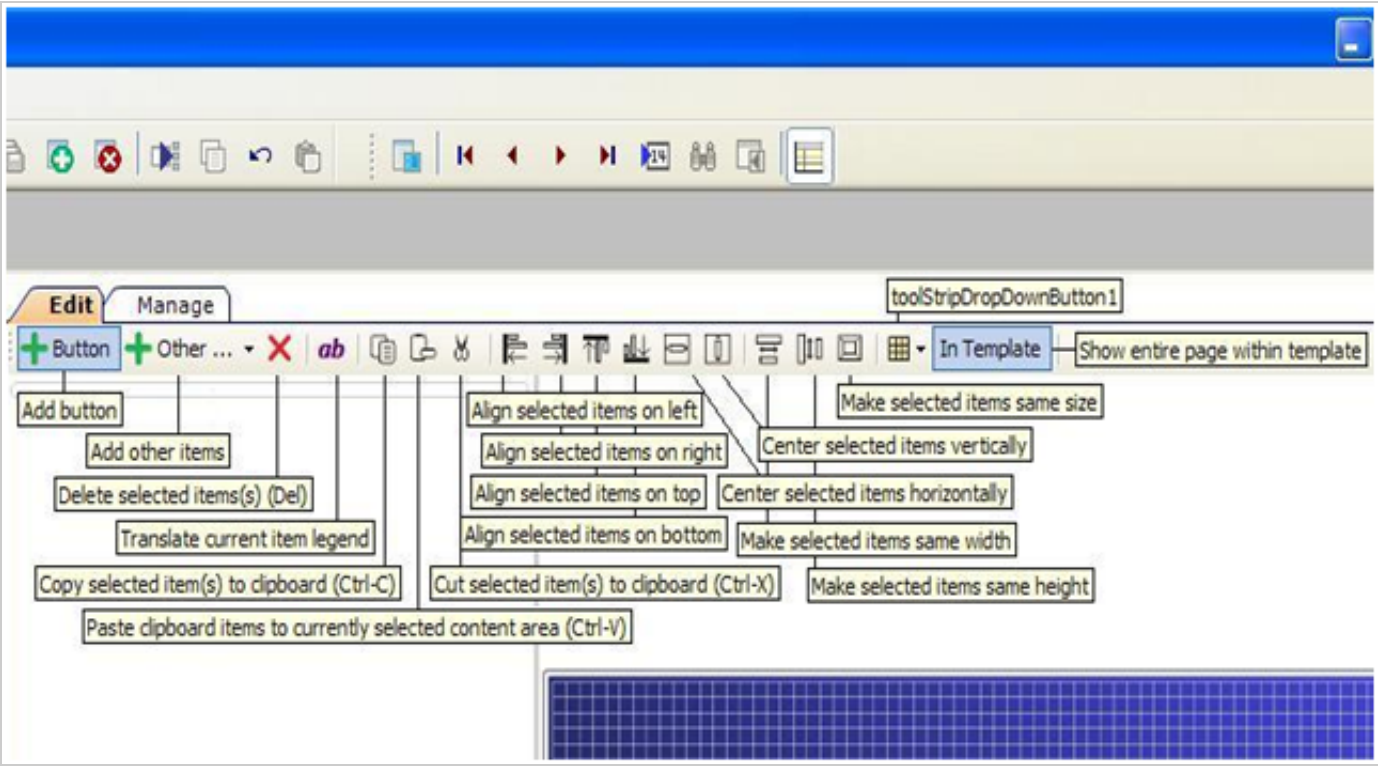


Pre-configured Template choices that are available

Page Design Programming Examples

Standard Template Page Design Example

Page Design Toolbar

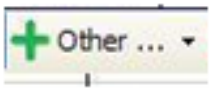


Page Design Editing Options

Once a new page is inserted, use the toggle button on the EMC toolbar to flip the view in order to add buttons to the page. Upon accessing the **Form** view, there is a complex toolbar under the **Edit** tab. The screen shot shows the description for each button on the toolbar for editing pages in the page design module. Each editing option is reviewed below in their order of display on the toolbar.

Page Design Toolbar Editing Options

This button is for adding new buttons to the page.



The **+Other...** button will display a drop-down menu where a user can add several different objects to the page. The options in this drop-down include: Dining Table objects, Menu Item SLUs, Condiment Ordering SLUs, Open/Closed Check SLUs, Entry area (used to display the last items entered, i.e. numbers, menu items) and Panels. Each of these items will be described in greater detail further down.

This button is used for deleting items on the page. It is different than the delete button on the

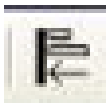
EMC tool bar which would delete the entire page record.

This button is used to translate the text on the currently selected page objects to a different language (if a secondary language was configured in EMC).

This button will copy all selected items to the screen.

This button is for pasting copied items.

This button is for cutting currently selected items.

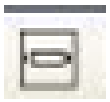


This button will align all currently selected objects to the left.

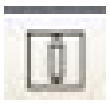
This button will align all currently selected objects to the right.

This button will align all currently selected objects to the top.

This button will align all currently selected objects to the bottom.



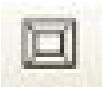
This button will center all currently selected objects horizontally.



This button will center all currently selected objects vertically.

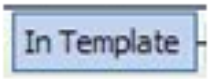
This button will make all currently selected the same width.

This button will make all currently selected the same height.



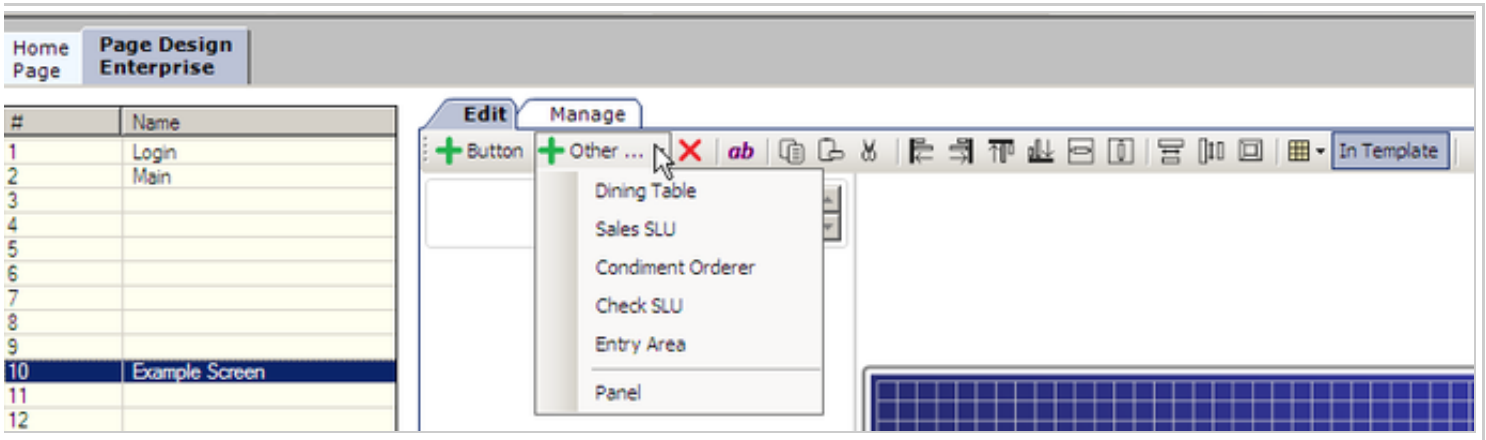
This button will make all currently selected the same size.

This button is a tool strip drop-down menu.



This will display the entire page within the template.

Page Design - Add Other Options



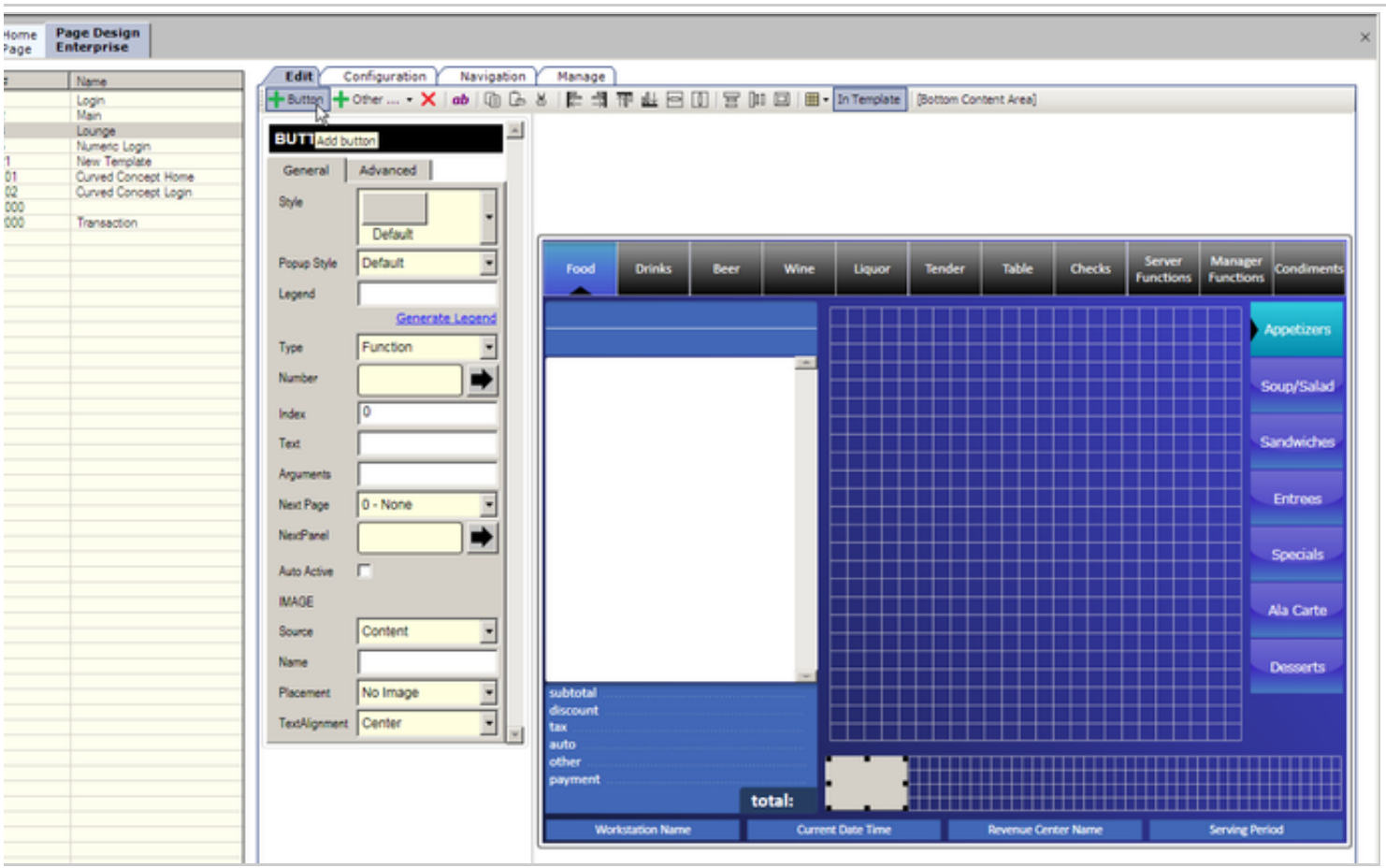
Add Other Items tab

The **+Other...** drop down menu button on the toolbar provides the opportunity to choose to create several different Ops user interface objects to a page. The list includes the following six objects:

1. ***Dining Table*** – These are user interface buttons that look and feel much like all other buttons, however they represent a dining table and when pressed offer a unique pop-up menu to the user.
2. ***Sales SLU*** – This will require the entry of the actual SLU record number, whether it be a Menu Item SLU, Discount SLU, etc. This will create a grid object that can be re-sized. Modifications can be made to the number of columns and rows.
3. ***Condiment Orderer*** – Similar to the Sales SLU, this area only displays items when a regular menu

item is ordered that has associated condiments. Otherwise this area will not display anything on the screen.

4. ***Check SLU*** – Similar to the Sales SLU; however this area only displays Open Checks for the specified area.
5. ***Entry Area*** – The area that will display the value of the last button that was pressed. This is useful for displaying numeric entries from a keypad.
6. ***Panel*** – The area that is locked in order to prevent a user from placing another type of button in the same area. A "panel" is a simple background area upon which programmers can place buttons. A panel can be used to visually group buttons. It performs no other function.



Current Content Area display

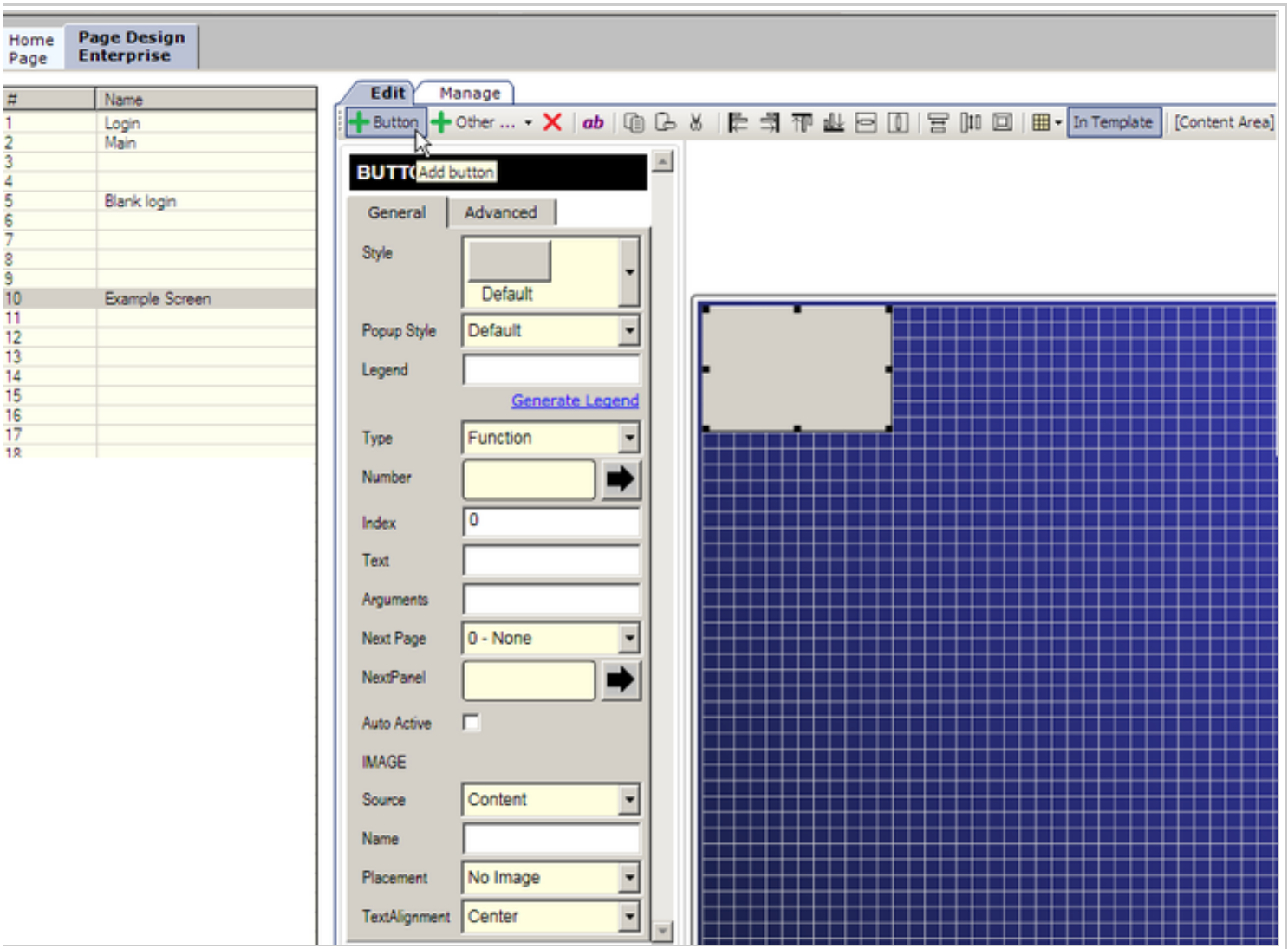
It's important to note that the user must first click on the destination content area on the grid (particularly for tabbed templates) before adding an item. That is, if the user adds an item to a content area but it doesn't appear, it means that the user hasn't selected the destination content area first. The current content area is displayed in the right hand side of the EMC page edit toolbar. The screen shot provided here shows that the user has clicked on the **Bottom Content Area** to add a button there. Note on the upper right side of the screen, next to the highlighted **In Template** tab that the **[Bottom Content Area]** text displays there to indicate which content area is currently being edited.

Button Configuration

Once a new button is added by selecting the **+Button (Add button)** icon and then highlighted, a configuration menu will appear to the left of the page layout. This is where the button is configured.

- Note that the **In Template** button has been selected on the toolbar in order to view the entire page during configuration.

Button Editing Options



Add Button tab

General Tab

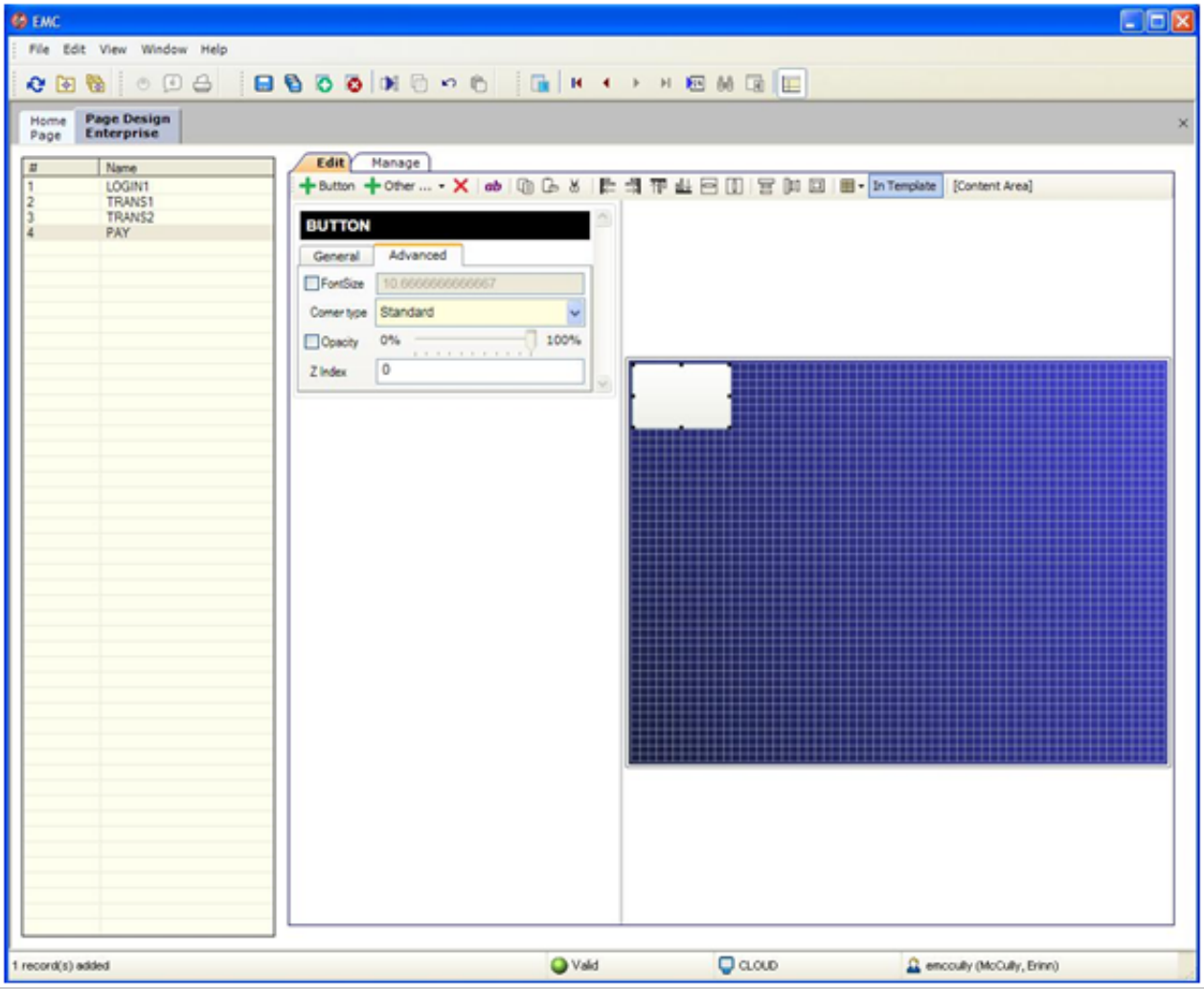
- ***Style*** – Applies the color and font settings to the button.
- ***Popup Style*** – This refers to configuring a button to display a pop-up menu. This was a newly implemented feature in Simphony v2.0.
- ***Legend*** – Is the text that will display on a button. **Generate Legend** will insert the text values from the item box below the ***Type*** box.
- ***Type*** – Specifies what type of button this is.
- ***Index*** – Only becomes active for certain buttons types that are programmed that need corresponding record types specified.
- ***Text*** – Only becomes active for Alpha-Numeric buttons.

- ***Arguments*** – Only becomes active for Payment Tender buttons.

Next Page/Panel

- ***Next Page*** – Drop down menu where the page direction is selected. This will be the next screen or page the Ops user will be directed to.
- ***Next Panel*** – If a tabbed template was selected, this area specifies which tab to navigate to after pressing this button.

Button Editing - Advanced Options



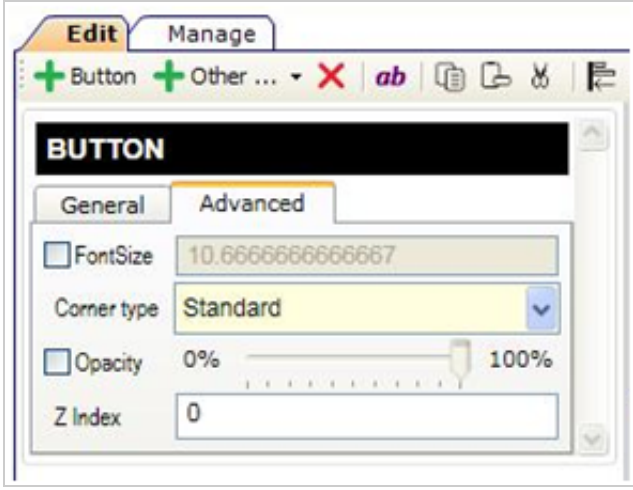
Advanced button tab

Advanced Tab

- ***Font Size*** – Size of the font for each button is assigned under this option
- ***Corner Type*** – This drop-down menu allows the button style to be adjusted to fit a different theme by rounding specific corners.
- ***Opacity*** – Enabling this will allow you to change this button's level of opaqueness or when one

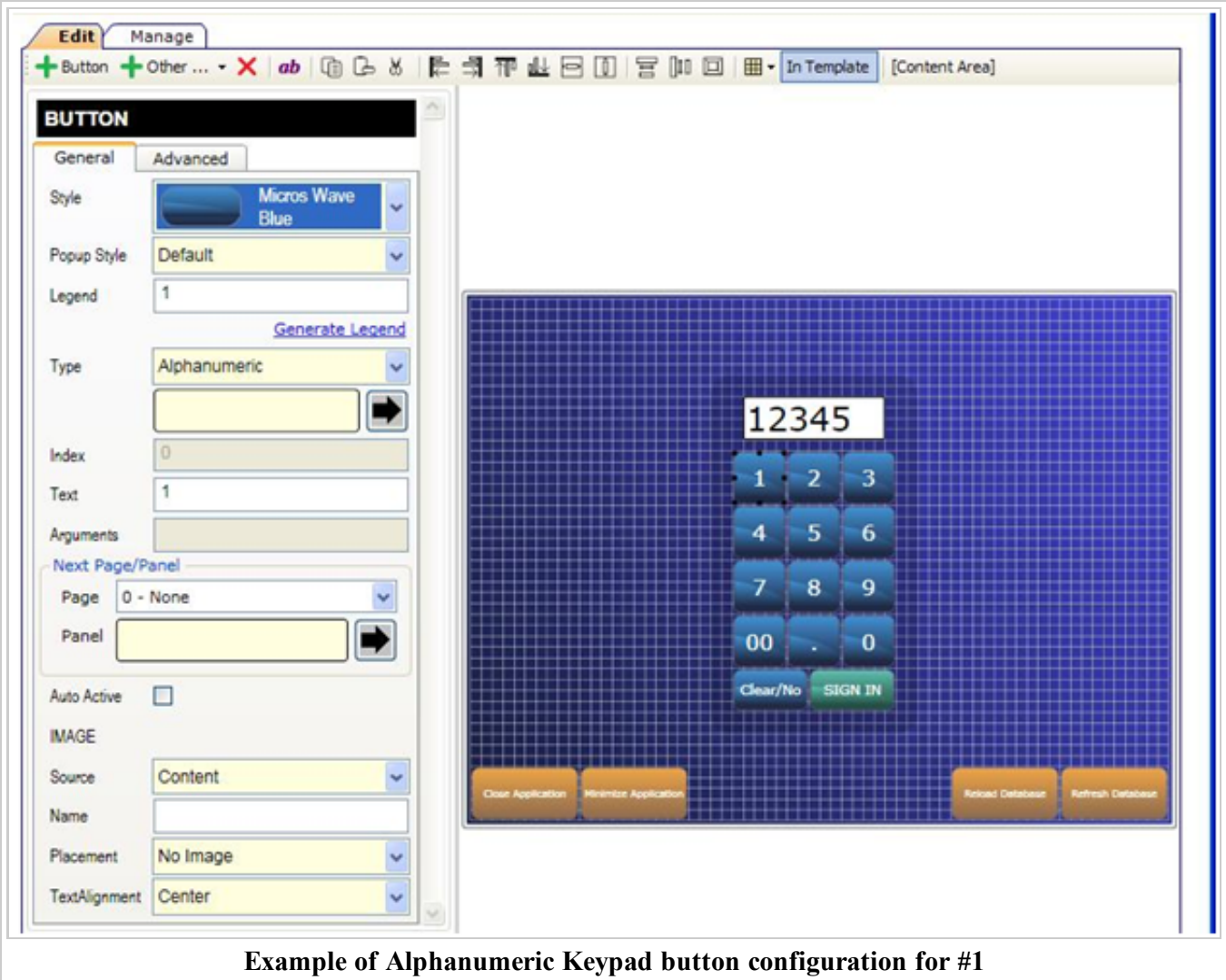
cannot see behind an item (panel or button). 0 means it is invisible; anywhere in between means that the user can control how much of the background "bleeds through".

- ***Z Index*** - Indicates whether an item appears above or below another item. An item with a Z-index of 1 appears on top of an item with a Z-index of less than 1.



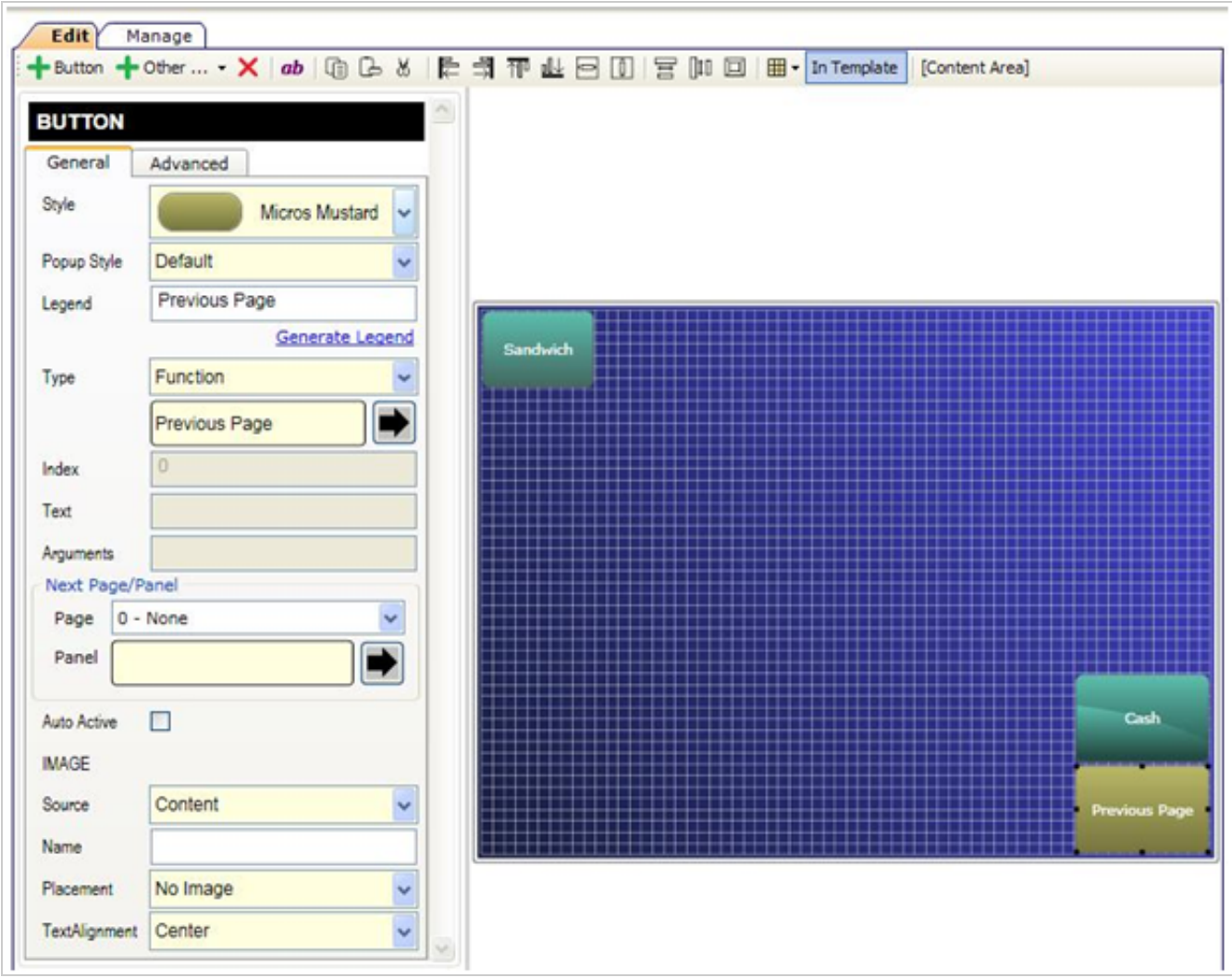
Advanced button config

Example of a Alphanumeric button



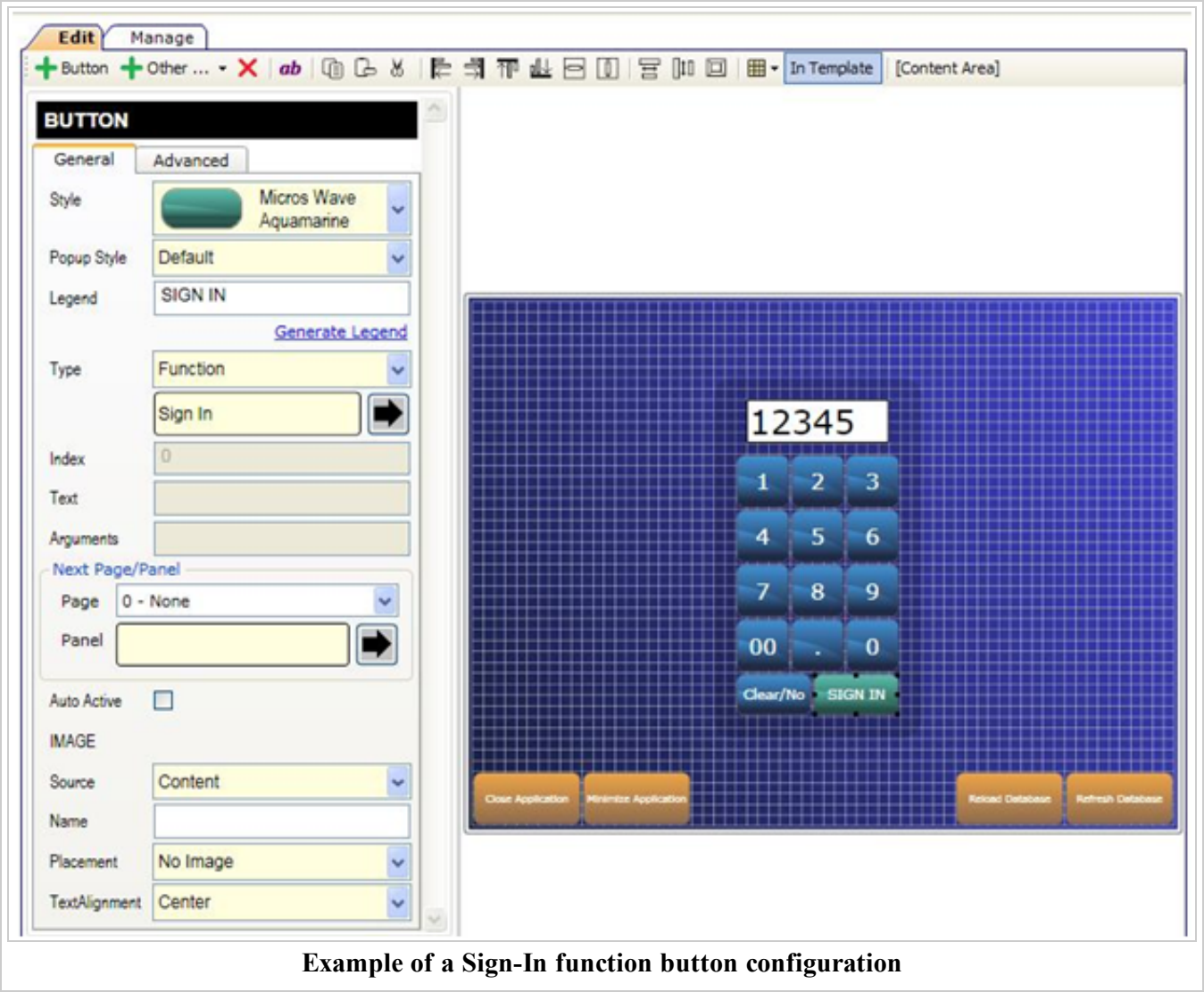
Example of Alphanumeric Keypad button configuration for #1

Example of a Previous Page button



Example of Next Page/Panel navigational button configuration options

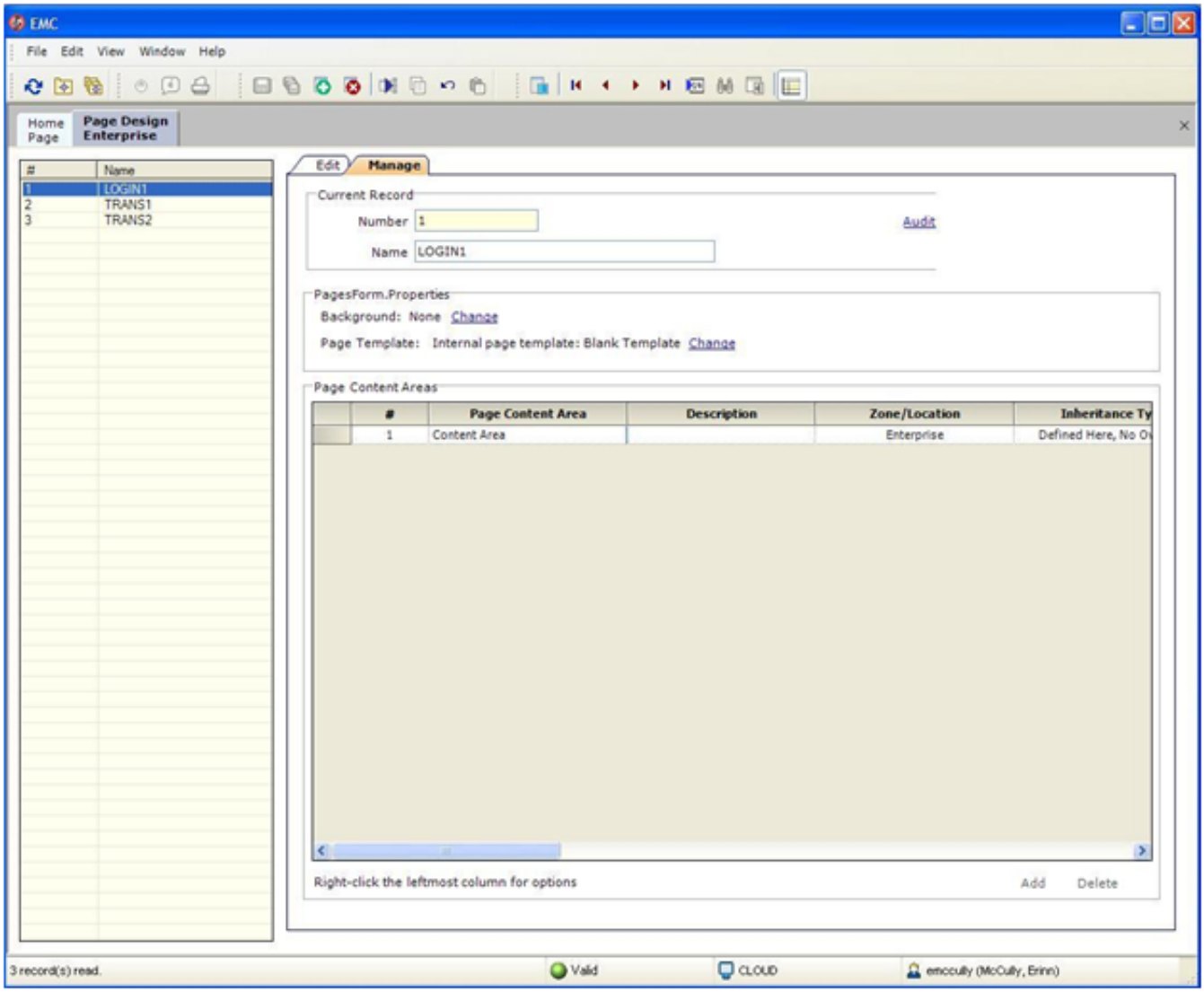
Example of a Sign In Function button



Example of a Sign-In function button configuration

Page Design Manage Tab Options - Standard Template

The **Manage tab** has limited options, but it displays a list of all of the content areas for a page. Clicking on the **Audit** link will display an audit trail of all of the changes made to this record. Users will most likely not be spending much time on this tab. Users should notice how different this tab looks for a page using a **Tabbed** page template vs. this **Standard** template view.

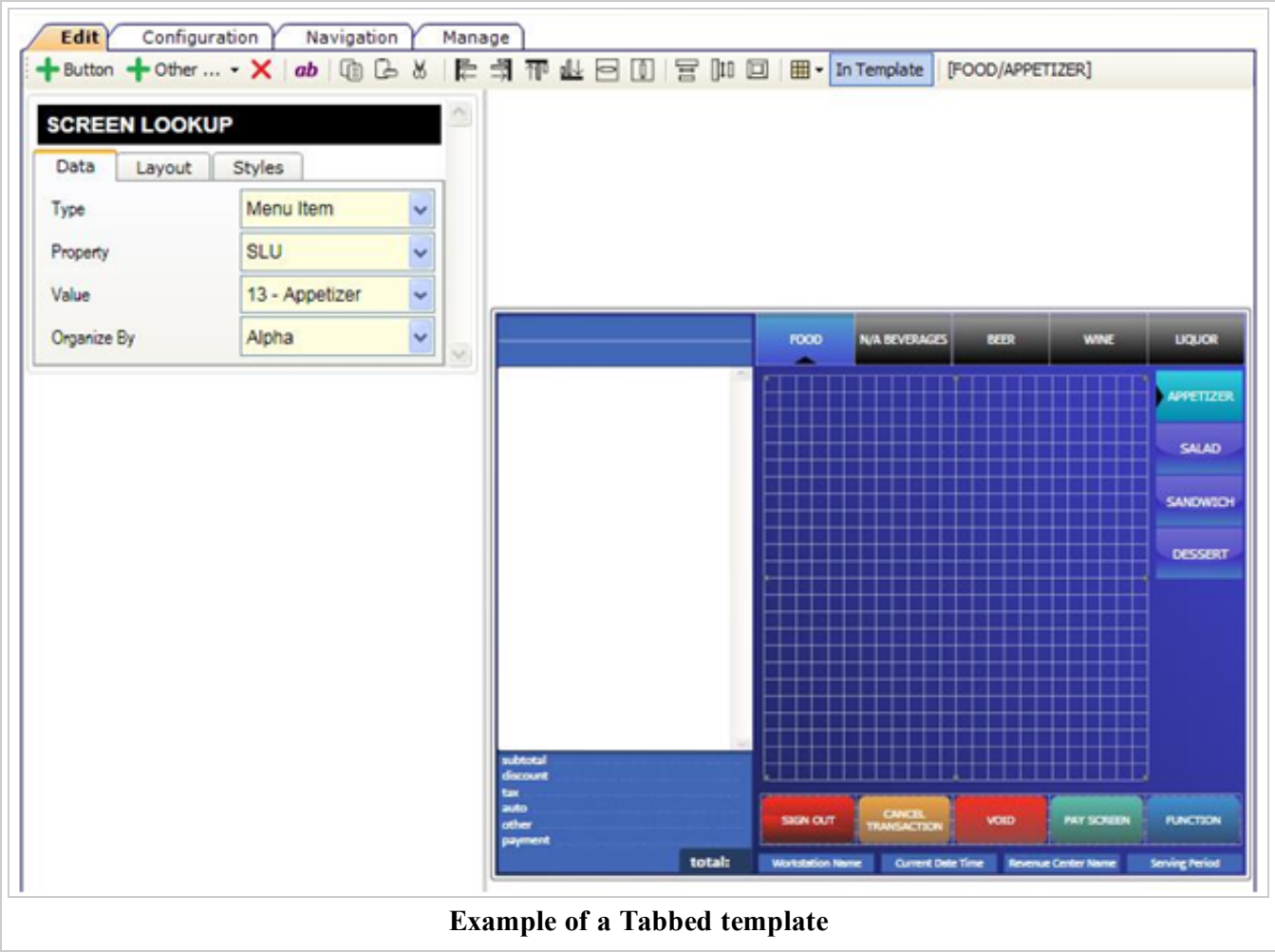


Manage Tab screen - Standard template

Tabbed Template Page Design Example

Tabbed Ordering Screen

Here is an example of what a Page with multiple content areas and side tabs displays during configuration. Note that the upper **Food** tab is selected as well as the **Appetizers** tab on the upper right. In this instance, any menu items with the Appetizer SLU # assigned to its Menu Item (MI) Definition file will display on this revenue center's Workstation touchscreen.



Example of a Tabbed template

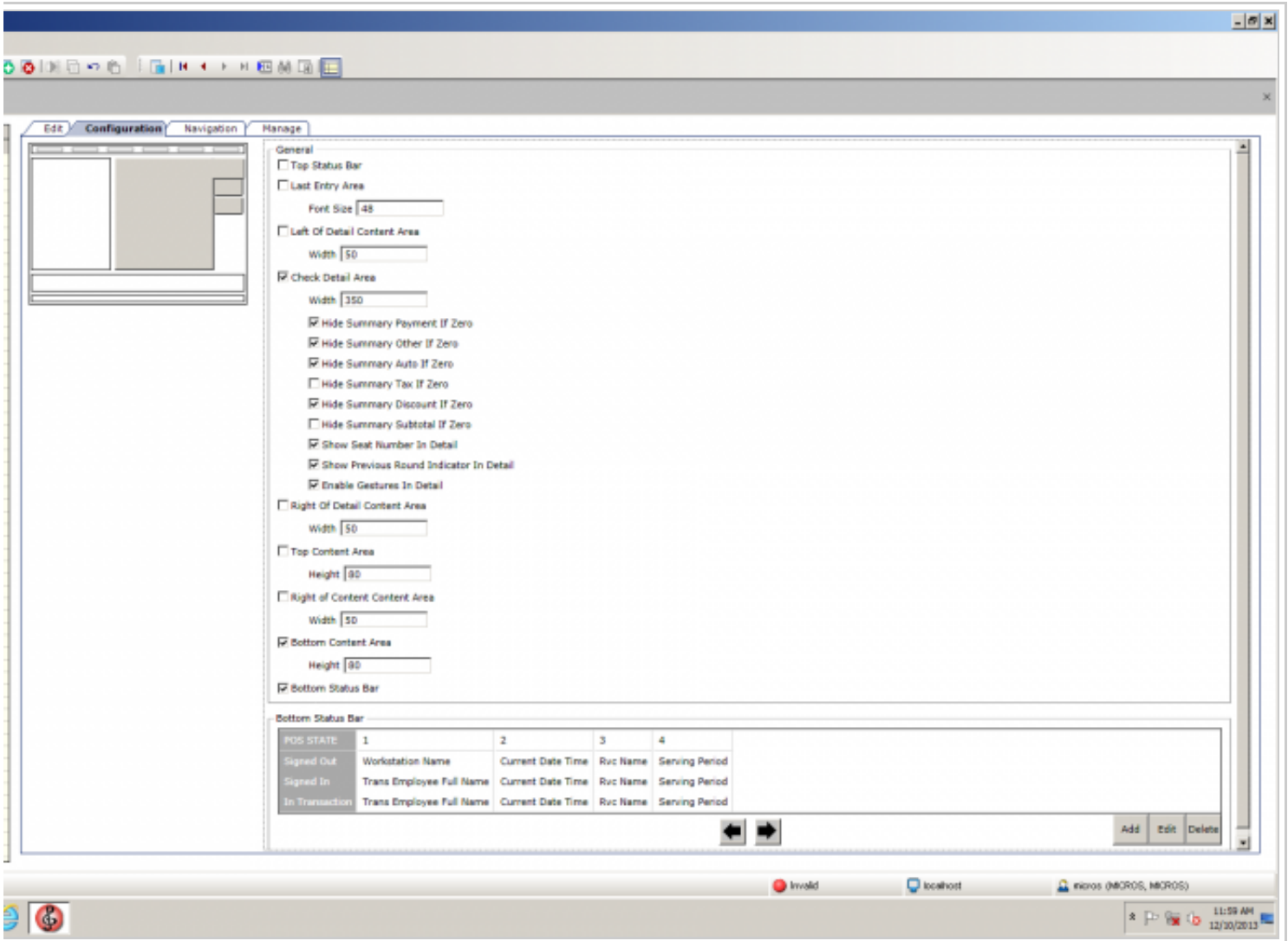
Tabbed Template Ordering Screen Configuration

Configuration Tab

Tabbed Page templates have two extra configuration tabs associated with them. These tabs are named the **Configuration** tab and the **Navigation** tab. The **Configuration** tab is used to set multiple display options for this page. This allows the user to customize the page display. As options are selected and deselected in this tab, the example of the template layout on the left will immediately update to directly represent how the template will appear on the Workstation touchscreen. Different templates have different characteristics from the outset, so initial experimentation and testing is recommended to become familiar with all of the pre-configured Tabbed templates that are available.

General Header

- ***Top Status Bar*** - Tabbed templates allow for the configuration of a wide variety of User defined status information to display on the Top if this option is enabled. See the **Bottom Status Bar** below for some examples.
- ***Keyboard/Last Entry Area*** - Allows for the addition of a field that will display keyboard entries on the screen.
- ***Bottom Status Bar*** - Enables the use of the Bottom Status Bar.



The Configuration tab in Page Design

- ***Left of Detail Content Area*** – Depending on the selected Tabbed template, this option enables space to be reserved for placing additional buttons on the far left of the Order Detail field.
- ***Width*** - Set the fixed width of the Left of Detail Area to display on the far left of the Order Detail section.

Check Detail Area

- ***Check Detail Area*** - When checked, the check detail area will display on the page.
- ***Hide Summary Payment if Zero*** - When checked, this total will not appear in the summary totals if the total is zero.
- ***Hide Summary Other if Zero*** - When checked, this value will not appear in the summary totals if the total is zero.
- ***Hide Summary Auto if Zero*** - When checked, this value will not appear in the summary totals if the total is zero.
- ***Hide Summary Tax if Zero*** - When checked, this value will not appear in the summary totals if the total is zero.
- ***Hide Summary Discount if Zero*** - When checked, this value will not appear in the summary totals if the total is zero.
- ***Hide Summary Subtotal if Zero*** - When checked, this value will not appear in the summary totals if

the total is zero.

- ***Enable Gestures in Detail*** -Gestures is an interactive page design feature added to streamline the user interface so that extra buttons are not necessary to perform certain actions. Gesture-specific support is found here. (http://wiki.micros.com/wiki/index.php?title=Gesture_Support)
- ***Right of Detail Content Area*** - Depending on the selected Tabbed template, this option enables space to be reserved for placing additional buttons on the far right of the Order Detail field.
- ***Width*** - Set the fixed width of the Right of Detail Content Area to display on the far right of the Order Detail section.
- ***Bottom Content Area*** - Allows for enabling the reservation of some screen space in order to configure additional buttons of the user's preference.
- ***Height*** - Sets the height of the Bottom Content Area.
- ***Bottom Status Bar*** - This is a matrix list of items that can be configured to display different data statically dependent on the state of Ops and dynamically based on the state of the POS Workstation. Information such as the Workstation Name, Current Date\Time, Revenue Center Name, Employee Name and the Serving Period may be selected to display among others.

Navigation Tab

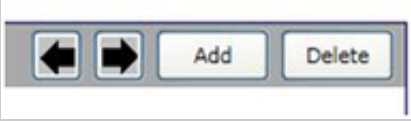
Example of a Tabbed template's Navigation screen

Definitions:

- **Content Area** – tabs along the top of the page/screen.
- **Tab Area** – tabs along the right-hand side of the page/screen. Tabs are subsets of each Content Area.

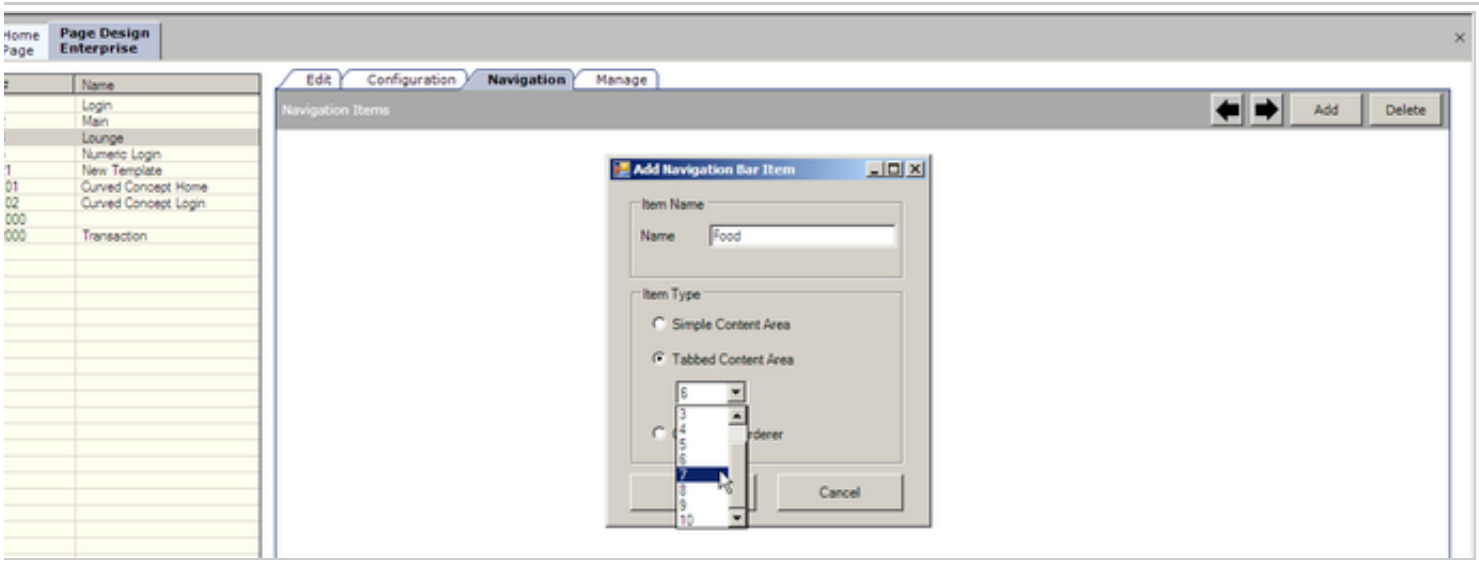
The Navigation tab allows a user to configure content areas and then tabbed areas for that content area. Once all the content and tab areas are configured, rules can be created for what content areas and/or tab areas are visible based on several different specifications. These rules can be used to restrict access to certain tabs and to hide tabs based on Meal Periods, Employee state, and Workstation state. The screen shots below proceed through adding the content areas, tab areas, and visibility/access rules.

Adding Navigation Tabs



Add Navigation Tabs tool

1. Click on the **Add** button at the top right corner of the area under the **Navigation** tab.
2. This will bring up the “Add Navigation Bar Item” dialog box where the name can be specified for the Content Area. This is where a user allocates that this is a Simple Content Area, a Tabbed Content

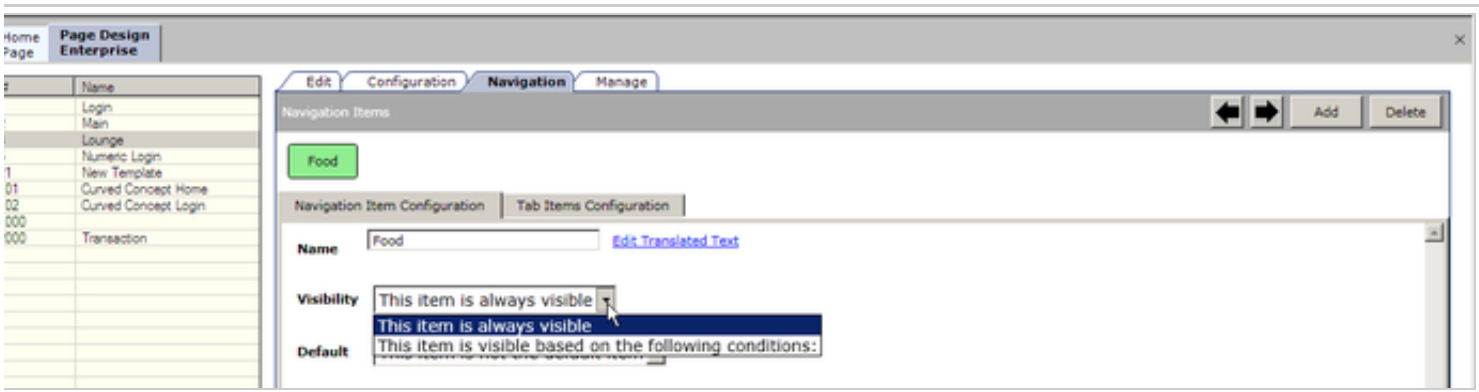


Add Navigation Bar Item tool

Area, or a Condiment Order.

3. If Tabbed Content Areas is chosen, the drop-down menu to specify how many tabs on the right side will be displayed / available for configuration. There are a maximum of 10 available, and a maximum of 8 to be displayed at the same time. In this example, 7 tabs for the **Food** tab will be created under the Tab Items Configuration file (see below).

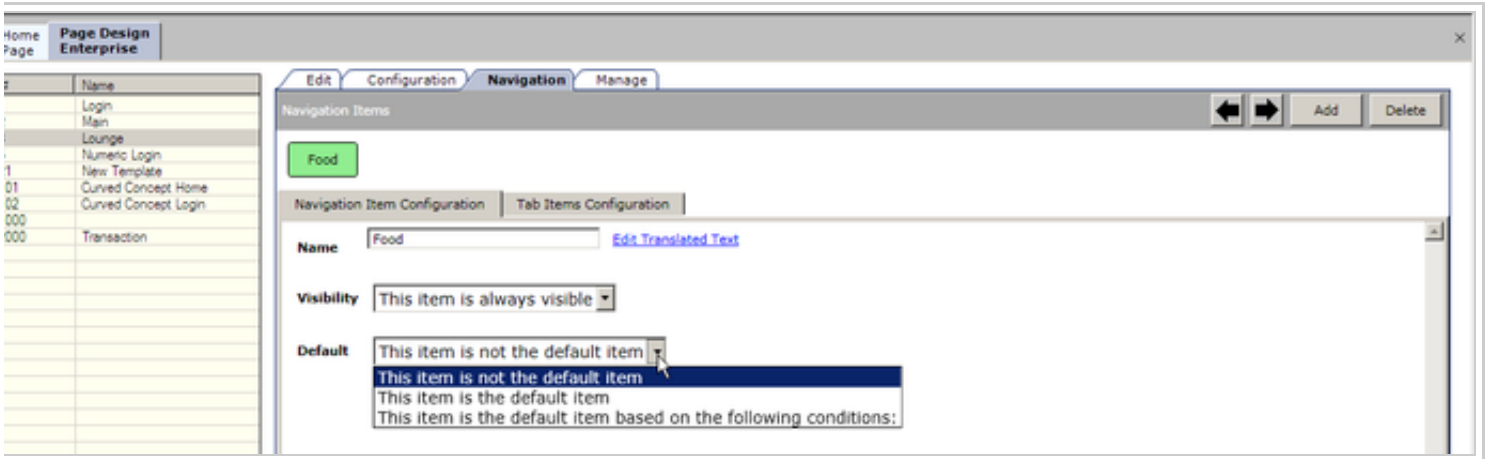
Navigation Item Configuration tab Options



Navigation tab Editing Options

As content tabs are added, note that they display in the EMC with a green hue. This colorization let's the programmer know which tab is being edited. As tabs are configured, the ***Visibility*** option may be edited and ***Default*** rules can be set to enforce access restrictions and specify which content areas or tab areas will be the transaction defaults. These settings will be reviewed in more detail later in this article. See **Visibility** & **Default Settings**.

It was previously mentioned that no more than 8 right-side tabs will ever be displayed at one time. This restriction is due to sizing specifications inherent to the Ops template. The height and width of the tabs themselves are not configurable, so due to their height, no more than 8 will fit on the screen at a time. Despite this display limitation, EMC will allow you to add up to 10 tabs. Additionally, the maximum number of tabs that can be displayed is based on whether the user has enabled the numeric entry area, the



Navigation tab Editing Options

top and bottom status bars, as well as the height of the bottom content area. The display of 6 tabs is probably more realistic, but programmer's should experiment to find out the actual maximum number of displayed tabs based on their configuration needs.

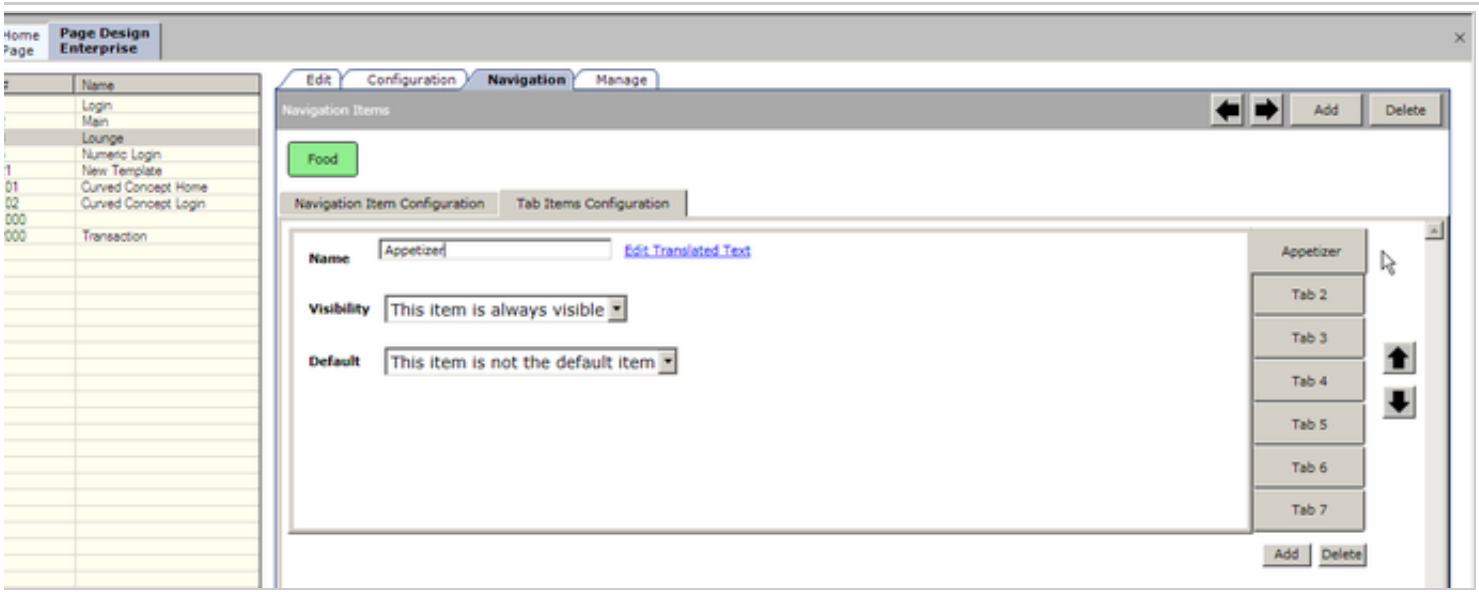
- **Question:** So why will the system allow you to add up to 10 tabs when it can ever only display 8 at a time?
- **Answer:** It allows you to add more tabs than it can display because of the Visibility rules. It allows you to configure up to 10 with the expectation that rules will be put into place that will prevent more than 8 being visible for any employee.

Tab Item Configuration tab Options

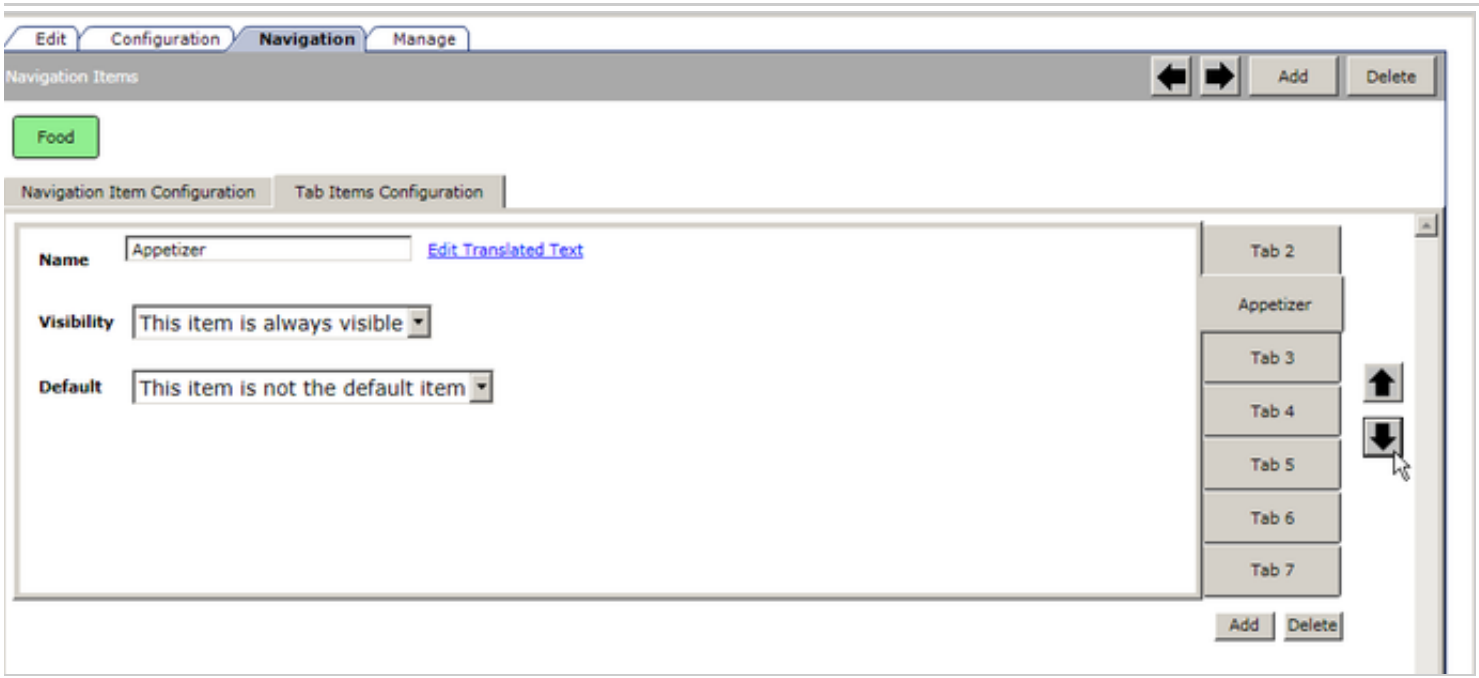
Tab Items Configuration Navigation Options

The 7 Tabs that were inserted earlier, display on the far right side.

Type the name of the tab within the **Name** field and note that the tab immediately updates and displays correctly.



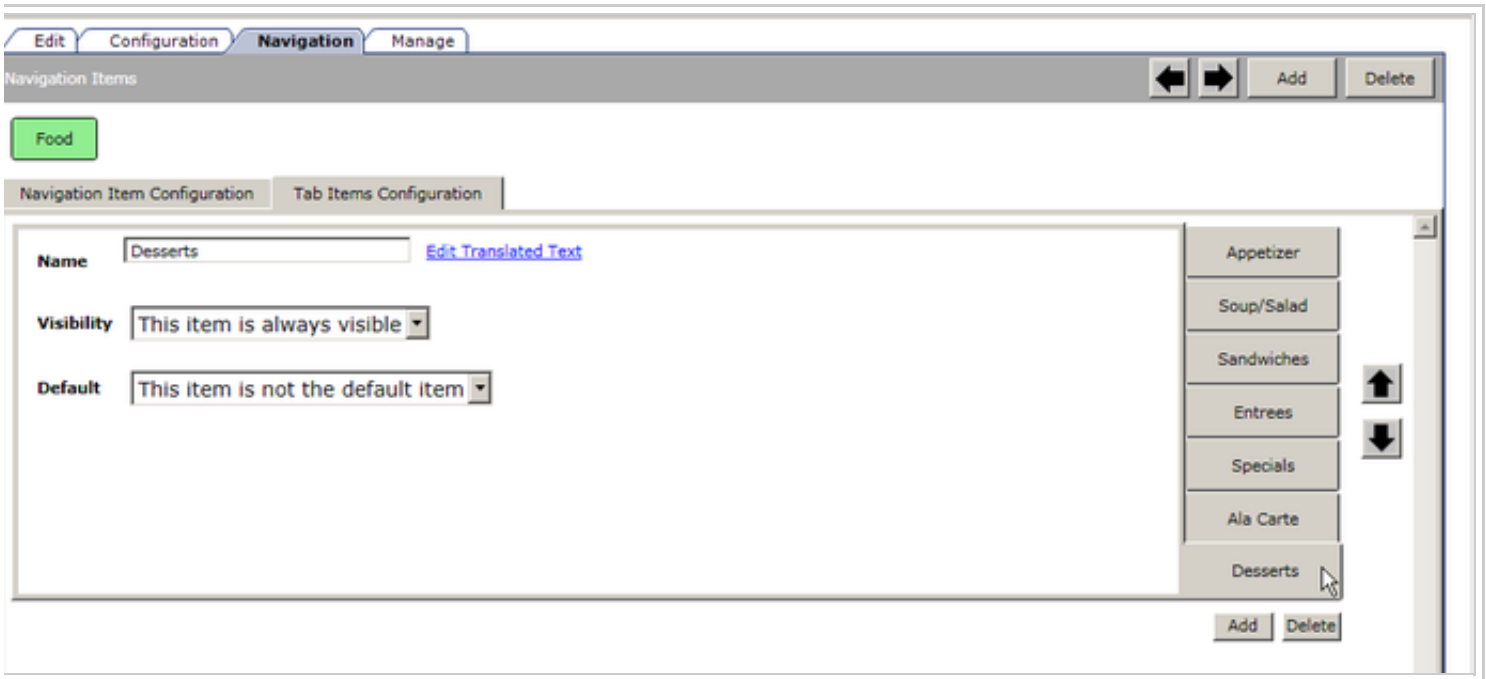
Tab Items Configuration Navigation Options



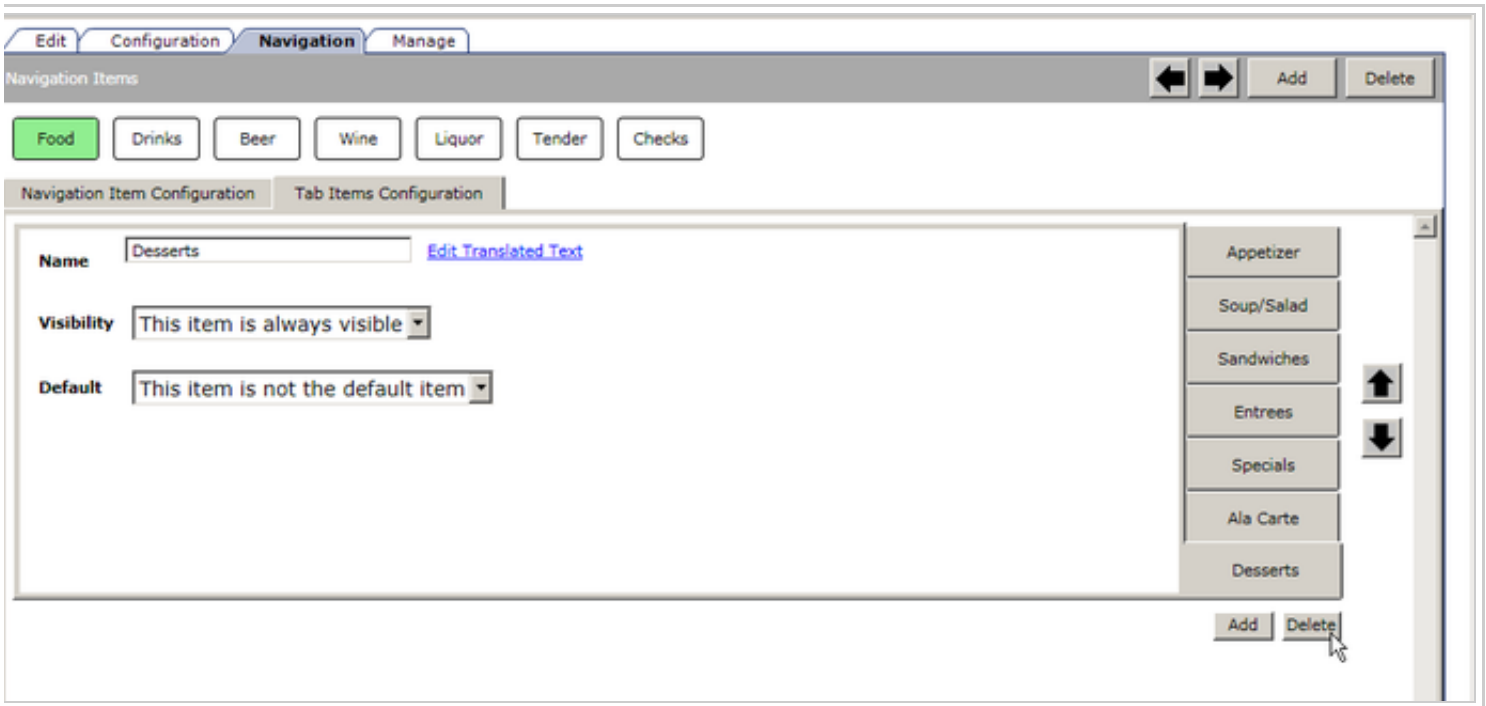
Tab Items Configuration Navigation Options

Using the Up/Down arrows on the right, tabs may be raised or lowered accordingly.

Also note that tabs may be added or deleted using the **Add** / **Delete** buttons on the lower right.



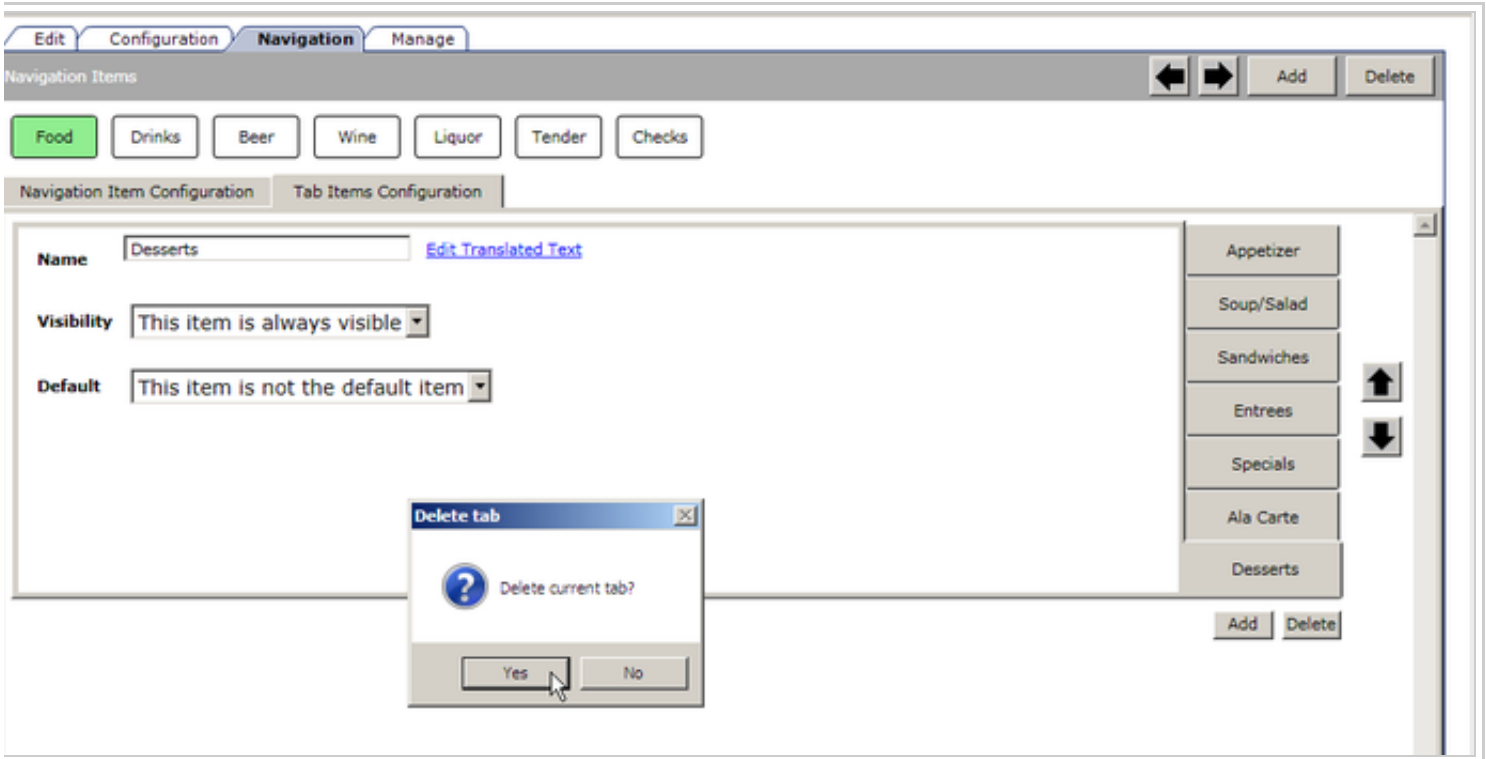
Tab Items Configuration Navigation Options



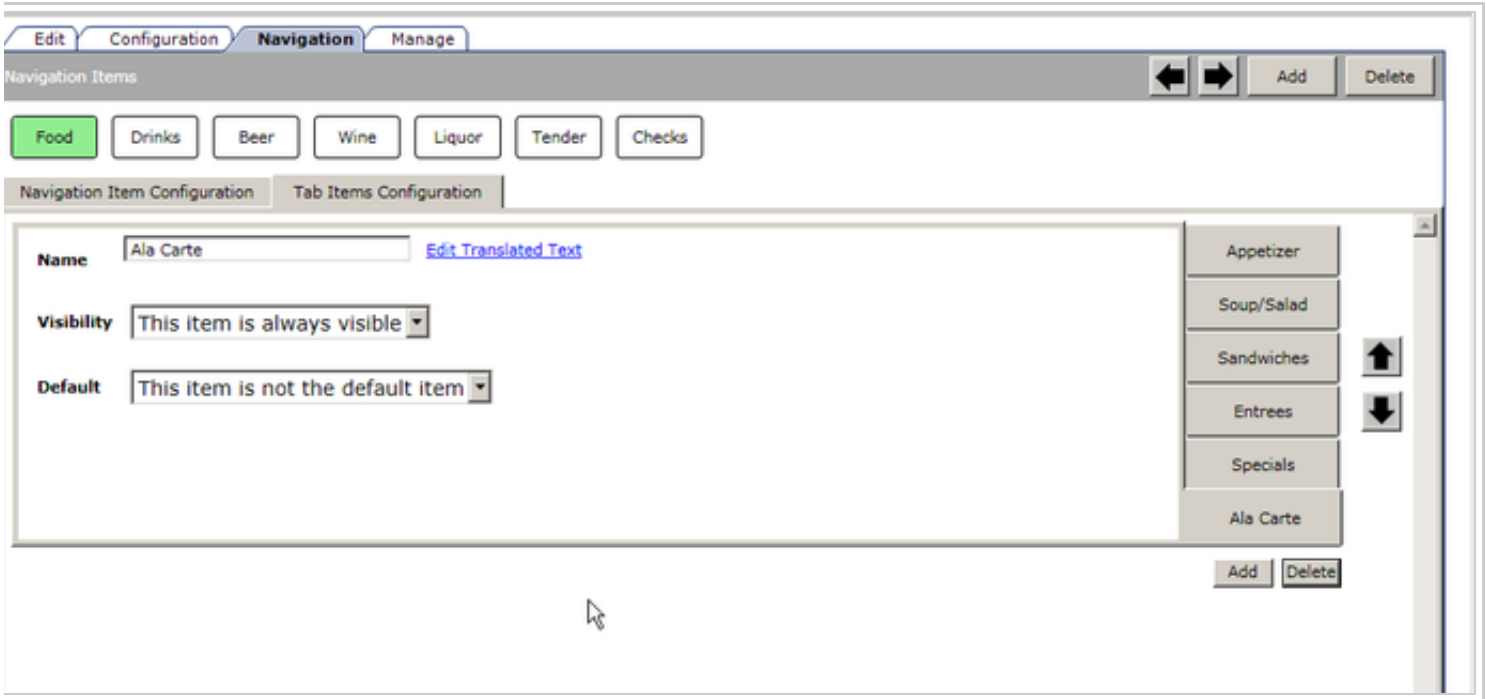
Tab Items Configuration Navigation Options

Simply highlight a tab and click on the Add or Delete buttons. In this example, the **Desserts** tab will be deleted.

Note the user is prompted to confirm the deletion of the tab.



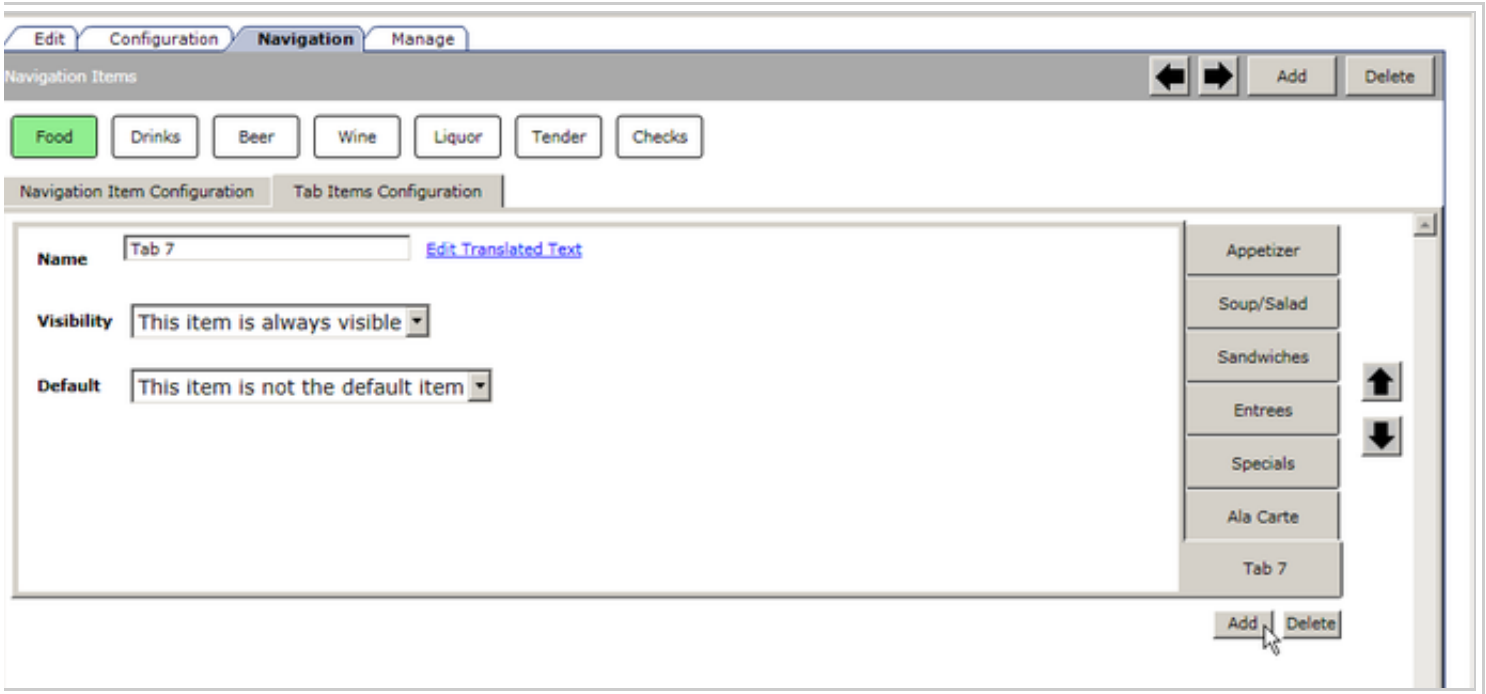
Tab Items Configuration Navigation Options



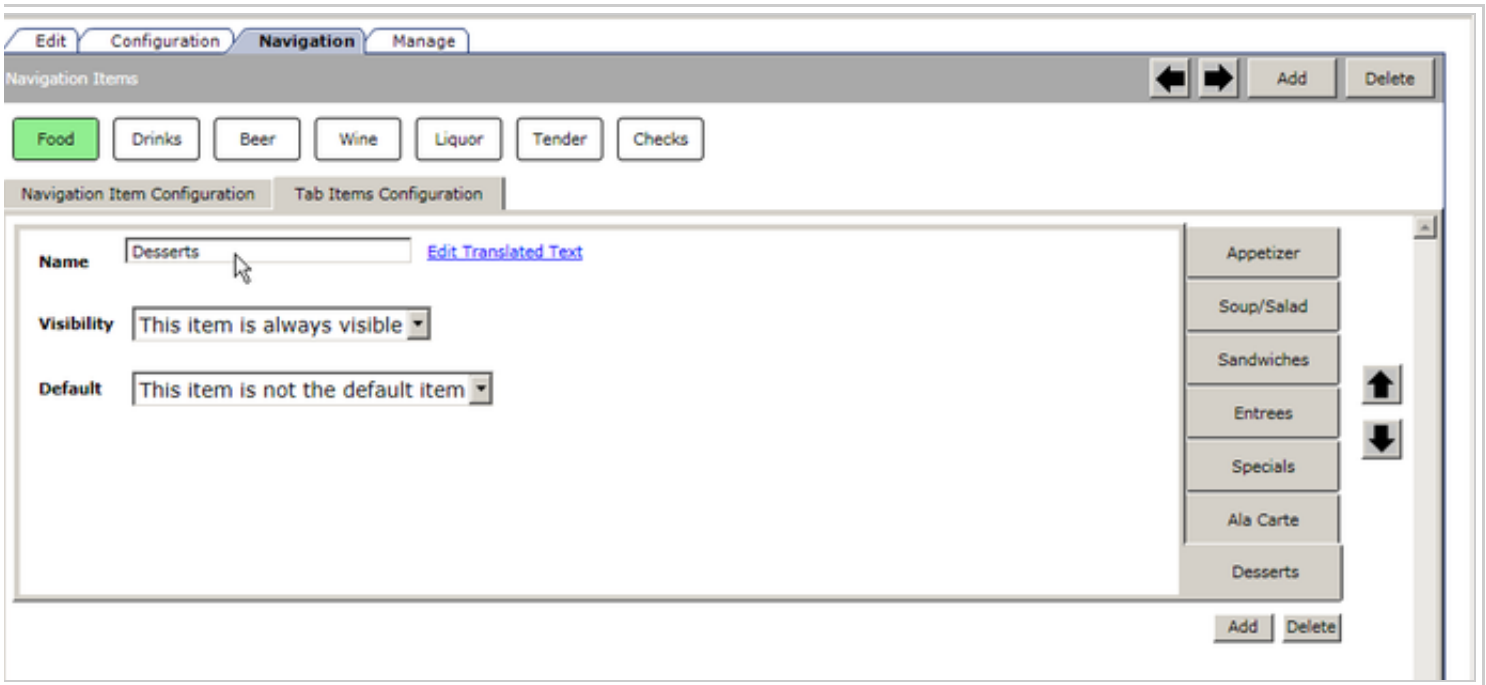
Tab Items Configuration Navigation Options

The **Desserts** tab is no longer there. User's can also add tabs as shown below.

Simply click on the **Add** button to insert a new tab.



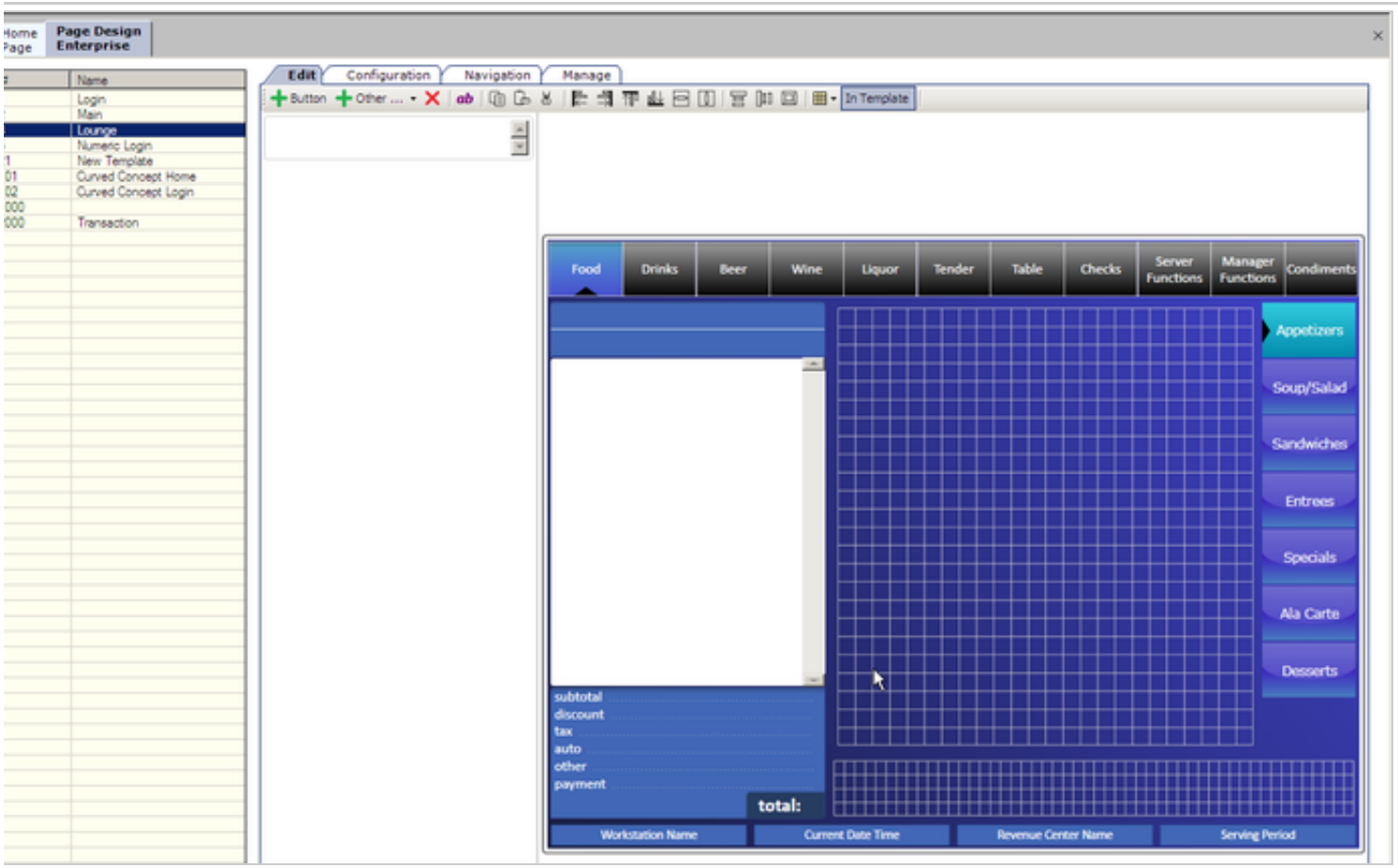
Tab Items Configuration Navigation Options



Tab Items Configuration Navigation Options

Type the name of the new tab in the **Name** field.

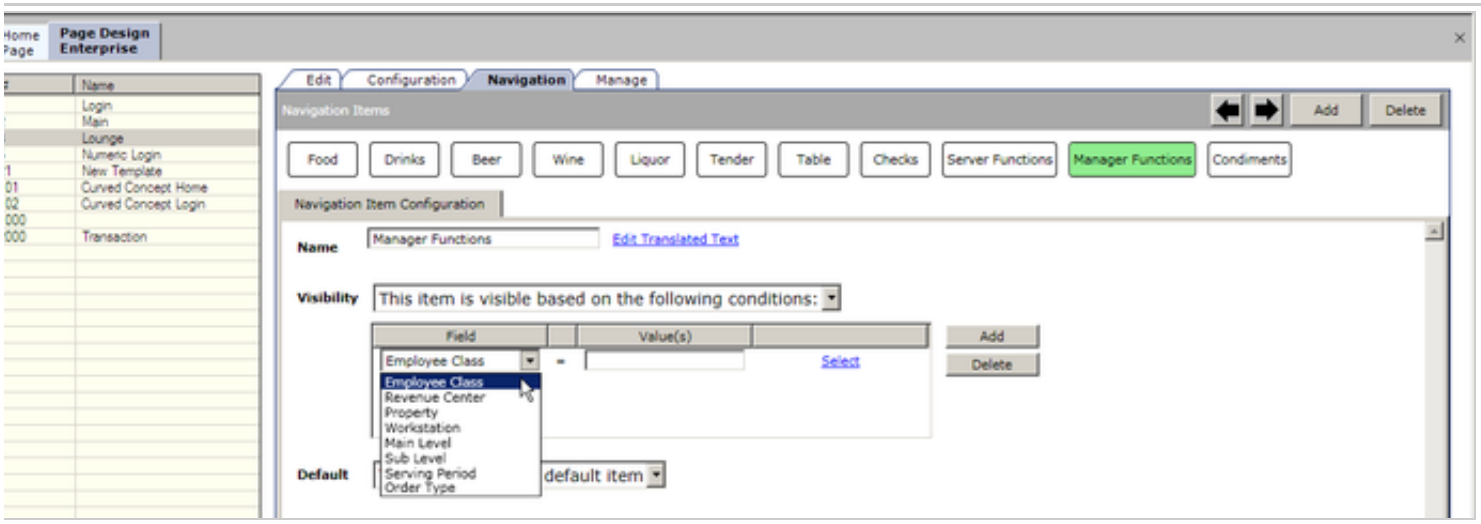
The finished product will display on the EMC and ultimately the Workstation (without the grid) as shown here.



In Template view of configured Tabbed template

Visibility & Default Settings

Visibility Options



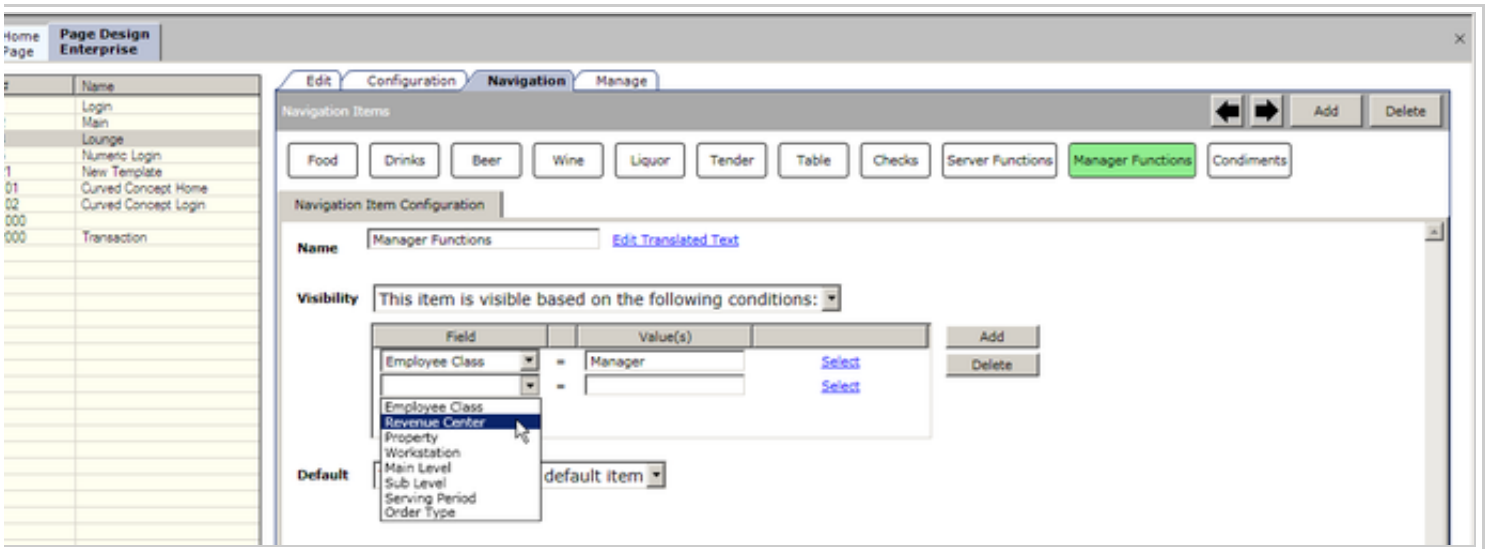
Navigation Configuration Options

As previously mentioned, the **Visibility** and **Default** settings need to be considered upon creating every tab. There are a few options that will assist programmers in defining which tabs will display for which user's

based on certain criteria that will now be reviewed in more detail. In this example, assume a **Manager Functions** navigational tab has been created. In reference to the **Visibility** configuration options, there are two choices;

1. **[This item is always visible]**
2. **[This item is visible based on the following conditions:]**

It's likely that most employees will not be able to access or utilize Manager Functions, so let's assume that the **[This item is visible based on the following conditions:]** option will be enabled. When this option is enabled, there are a number of opportunities to limit a user's access to certain tabs.



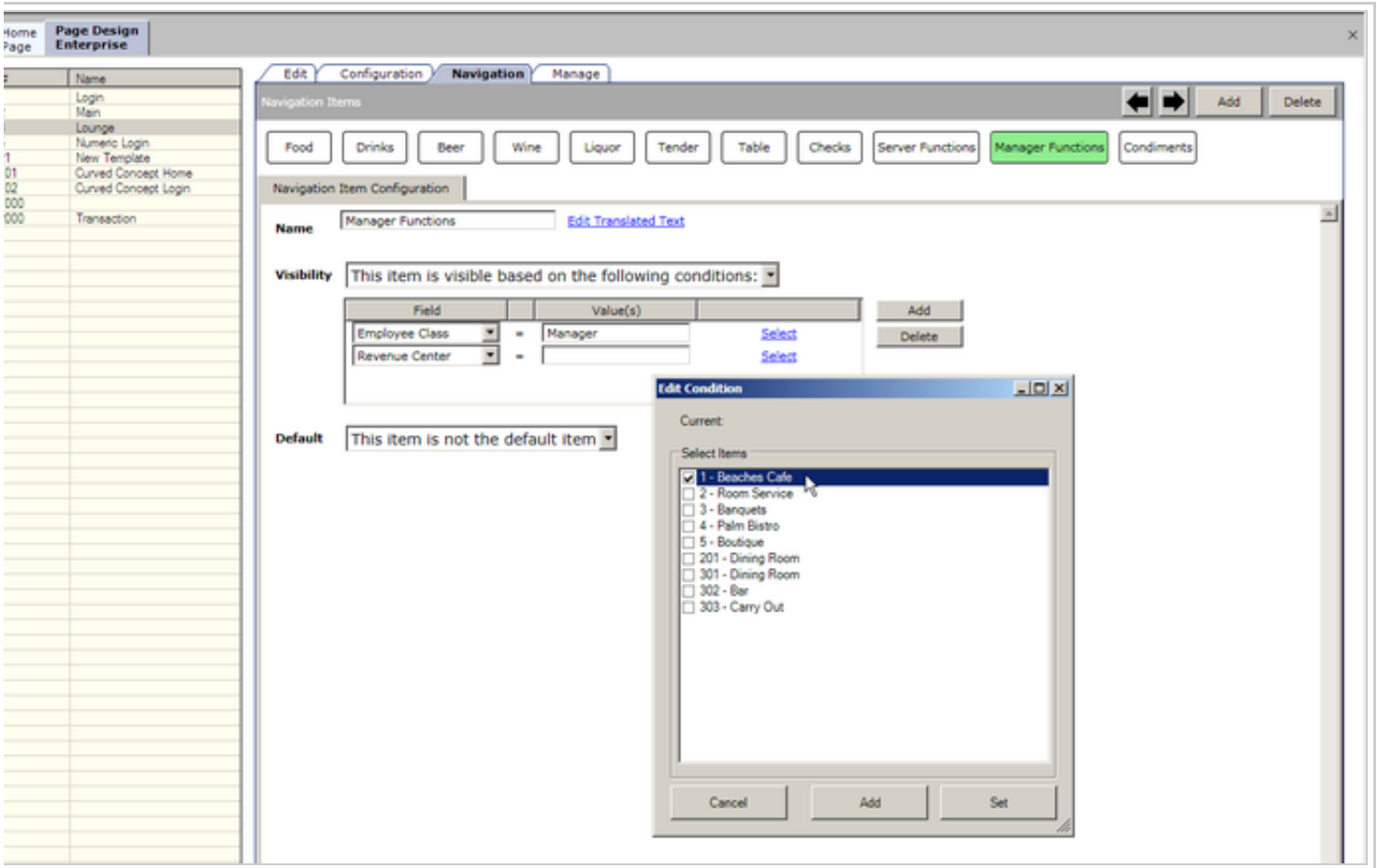
Navigation Configuration Options

As shown here, there are several application modules\files to choose from that may be selected to control the display of any given tab. These choices are located under the **Field** column. The various choices are;

- Employee Class
- Revenue Center (RVC)
- Property
- Workstation
- Main Level
- Sub Level
- Serving Period
- Order Type

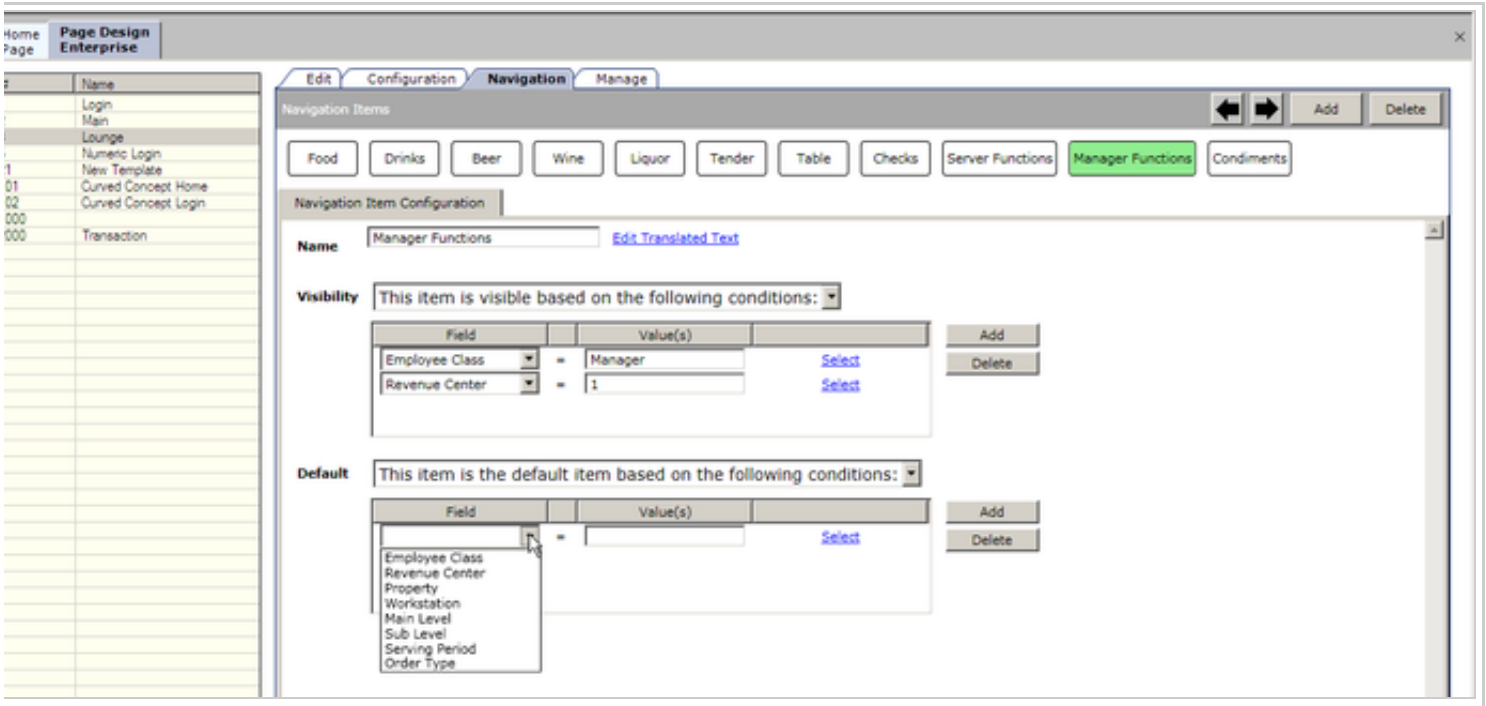
In this example, the **Employee Class** will be utilized to determine access to the Managers Functions tab by clicking on the **Select** link and assigning the **Manager** Class under the **Value(s)** column. Please note that additional security choices may be added by using the **Add \ Delete** buttons to the right of the columns.

The next selection shown here, will be to further limit a Manager's access to the Managers Functions tab by RVC by adding and then selecting the **Revenue Center** option. Next, check the appropriate checkboxes for the corresponding RVC\s to which the Manager has access.



Navigation Configuration Options

Default Options



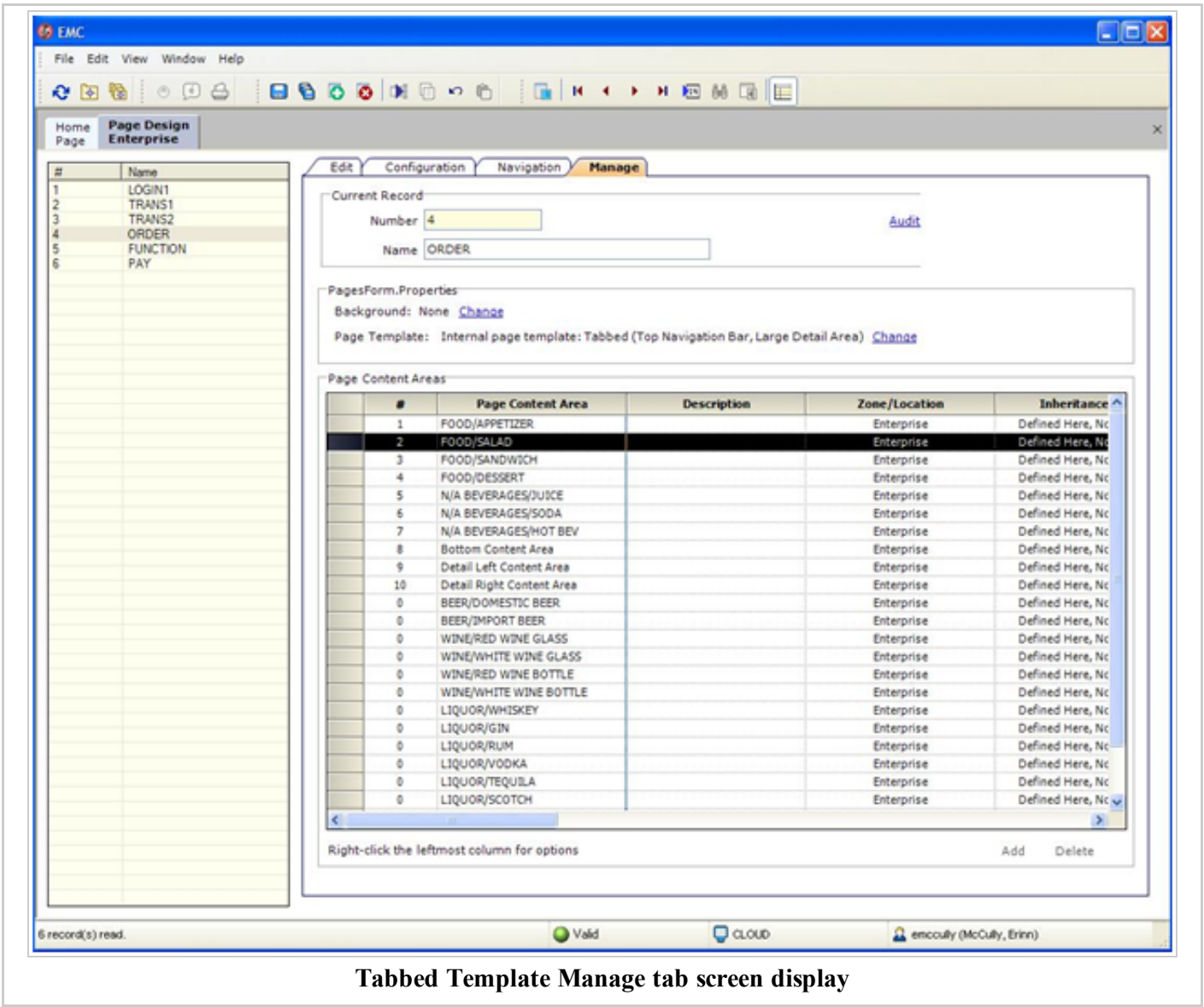
Navigation Configuration Options

The **Default** options are located underneath the Visibility options, but there are three instead of two. They are:

1. **[This item is not the default item]**
2. **[This item is the default item]**
3. **[This item is the default item based on the following conditions:]**

Sticking with the Manager's Functions example, the Default settings are meant to allow programmer's to establish which tab will serve as the logged on user's initially highlighted tab upon signing on to the Workstation client. In other words, if a Manager were to sign onto a Workstation, the Managers Functions tab will already be enabled and the Manager Functions page would be displayed. The same thought process would apply to any employee. Perhaps the **Food** tab would initially be enabled for a Server or the **Tender** tab would be enabled for a **Cashier**. Using the third option, **[This item is the default item based on the following conditions:]**, then the Default settings may be clearly defined for all user's by utilizing the provided parameters.

Page Design Manage Tab Options - Tabbed Template



Tabbed Template Manage tab screen display

As stated earlier, the **Manage** tab is not a tab users will need to spend much time on. It allows users to access and view specific pieces of the overall Page to change the background. In comparison to a legacy or Standard Page template, there are many more record entries displayed here when a Tabbed template is utilized.

Pay at the Table

Contents

- 1 What is Pay at the Table?
  - 1.1 Ops Example
- 2 How-to
  - 2.1 Configure Add Tip
  - 2.2 Configure Email Receipts
  - 2.3 View Check Storage and Reporting
- 3 See also

This article discusses functionality that relates to **Simphony v2.x**.

The Pay at the Table feature was introduced in Simphony 2.7 GR.

What is Pay at the Table?

A server presents a tablet device with the check to the guest. The guest can view the check, add a tip, swipe a credit card, share the check, sign the check after the credit card is authorized, and receive a receipt via email and/or print copy. Check images, including captured signatures, are available through the mymicros.net reporting interface.

Ops Example

1. The server will initiate Pay at the Table via a function button, and then will present the tablet to the guest at the table. The check presented in the tablet is similar to what is shown in the Check Detail Area. All check items are visible.
2. Touch **Next**.
3. Choose to **Share Payment** or select **Next** to continue with one payment method.
4. Select either email or print receipt. A printed receipt can print on a portable Bluetooth printer.
5. Swipe the credit card to authorize payment.
6. The guest signs the tablet. (All electronic payments require a signature.)
7. The check is paid and closed. The tablet will remain on a summary screen in which the server or another employee with credentials can exit back to POS.

How-to

Configure Add Tip

1. In the EMC Page Design module, add a button with the function **Pay at the Table**.

2. Click the **Pay at the Table Config** button.
3. Check **Enable Tip Screen**.
4. Enter three default tip percentage values (for example, 10, 18, 25). These tip percentages will appear in Ops.
5. Enter three default share values (for example, 2, 3, 9).
6. Enter the payment command as **CreditDebit:MCreditDebit CreditAuthAndPay**.
7. Click **OK**.

Configure Email Receipts

1. Navigate to *EMC-> <Property level>-> Setup tab-> Property Parameters-> General-> **Primary SMTP Server***.
2. Enter information in the following fields:
   - **Server** - Email server or service to use. Click **Select** to choose from the SMTP Server list of commonly used mail servers (for example, Outlook, Gmail, Yahoo, etc.).
   - **Port** - Port number for the configured SMTP email server. A default port of 587 will work for most SMTP servers.
   - **SSL** - It is recommended that you check this box to require secure Internet communication
   - **User Name** - User name of the email address that will send receipts
   - **Password** and **Confirm password** - Password associated with the email username
   - **Source Email** - Full address that will appear as the sender in the emailed receipt. Depending on the SMTP server, this may not create a copy of emails sent.
   - **Name** - Business name or name to be displayed along with email in sender field. Depending on the SMTP server, this value may or may not display anywhere in the sent email (for example, *Username = jsmith Name = John* could appear as: John<jsmith@micros.com>).
   - **BCC List** - Enter the email address(es) that should receive a blind carbon copy of the email receipt that is sent to guests. MICROS recommends that you list the source email in the BCC field in order to have the ability to resend copies of email receipts later if necessary.
   - **Send Test Email** – After saving the information entered in the fields, click to send a test email receipt message to the source email address. If the email is successfully sent, a confirmation will appear.
3. Click **Backup SMTP Server**.
4. Configure the Backup SMTP Server with the same settings as the Primary SMTP Server or an alternate server to send emails from in case the primary server is ever down.
5. Click the **Text Formatting** tab.
6. Enter information in the following fields:
   - **Email Subject** - Enter text in rich text format to appear as the subject line of email receipts.
   - **Email Body** - Enter text in rich text format to appear as the body of email receipts. This must include @@Check in the body in order to send a copy of the receipt.
7. Click the **HTML Formatting** tab.
8. Enter information in the following fields:
   - **Email Subject** - Enter text in HTML format as the subject line of email receipts
   - **Email Body** - Enter text in HTML format as the body of email receipts. This must include @@Check in the body in order to send a copy of the receipt.
9. Set the **Send Html Email** option as desired. When checked, this option will dim the Text Formatting tab, and only the HTML format will send. If this option is not checked, the HTML Formatting tab will dim and only the text formatted email will send.
10. Save your changes.

View Check Storage and Reporting

The manager can now see the check voucher, along with the signature from Pay at the Table in mymicros.net using the Audit and Analysis portlet.

See also

Simphony 2.7

Popup Condiment Orderer

This feature or functionality was introduced in Simphony 2.7 MR4.

This article relates to programming of an EMC module.

Contents

- 1 Understanding the Popup Condiment Orderer
- 2 Configure a Popup Condiment Orderer page
- 3 Configure revenue center to use Popup Condiment Orderer
- 4 Configure menu item class to use Popup Condiment Orderer
- 5 Best practices
- 6 Using the Popup Condiment Orderer
- 7 See also

Understanding the Popup Condiment Orderer

The Popup Condiment Orderer provides a screen workflow that automatically advances to all required condiment groups when ordering menu items.

The Popup Condiment Orderer resides in a template. The operator uses this template to create a page that will pop up for required condiments. When adding a menu item (for example, Steak) that requires condiment selection to a transaction, the page with the template appears as a popup to select the required condiment groups (for example, meat temperature and sauce).

The operator can also recall a Popup Condiment Orderer to modify the required condiments of a previously ordered menu item. The operator can select the parent item or condiment in the check detail or select the Recall Popup Condiment Orderer function key (depending on configuration).

Unlike the regular Condiment Orderer, the Popup Condiment Orderer automatically pops up and closes.

Configure a Popup Condiment Orderer page

1. In the EMC, select a level (enterprise, zone, property, or revenue center), select Configuration, and then select **Page Design**.
2. Insert a new record (page).
3. Enter a record name (for example, Popup Condiment Orderer).
4. Select **Specify Template** and then select **Popup Condiment Orderer** from the Internal Templates list. This template is pre-filled with a Condiment Orderer control and a Done button. You cannot delete these elements from the template, nor can you copy elements to this template. The Popup Condiment Orderer template supports two key functions: Void and Transaction Cancel.
5. In the Popup Type drop-down list, select where you want the Popup Condiment Orderer to appear on the page. (The Popup Types do not apply to Ops clients running the Android and iOS mobile operating systems.)

- Full Screen
- Centered
- Next to Check Detail Area
- In Dynamic Content Area

6. Select **Allow selection in check detail area** if you want operators to select the current menu item and its condiments in the check detail area while the Popup Condiment Orderer is open.
7. Select **Manually dismiss Condiment Orderer** to have the Popup Condiment Orderer remain open after the operator selects all required condiments. The operator must use the Done function to close the Popup Condiment Orderer.
8. (Optional) Change the page settings, such as layout and button styles. You cannot modify the dimmed settings.
9. (Optional) Repeat steps 2 through 8 for each Popup Condiment Orderer page you want to create. Ops only requires one page for initial condiment selection and subsequent editing. However, you can configure two pages.
10. Save the changes.

Configure revenue center to use Popup Condiment Orderer

1. In the EMC, select the revenue center, select Setup, and then select RVC Parameters.
2. Enter information for the following General fields.

Field	Description
Default Condiment Ordering Popup	Select the default automatic popup that will appear when the operator orders a menu item with required condiments for the revenue center: ▪ None ▪ Popup Condiment Orderer
Default Condiment Editing Popup	Select the default automatic popup that will appear when the operator selects a menu item with required condiments in the check detail area for the revenue center: ▪ None ▪ Popup Condiment Orderer

3. Save the changes.

Configure menu item class to use Popup Condiment Orderer

The Popup Condiment Orderer configuration in the Menu Item Classes module overrides the revenue center configuration in the RVC Parameters module.

1. In the EMC, select a level (enterprise, zone, property, or revenue center), select Configuration, and then select **Menu Item Classes**.
2. Select the menu item class.
3. Enter information for the following General fields.

Field	Description
Condiment Order Popup	Select the automatic popup that will appear when the operator orders a menu item with required condiments: ▪ No Popup ▪ Use Revenue Center Parameter ▪ Popup Condiment Orderer

Condition Edit Popup	Select the automatic popup that will appear when the operator selects a menu item with required condiments in the check detail area: ▪ No Popup ▪ Use Revenue Center Parameter ▪ Popup Condiment Orderer

4. Save the changes.

If you do not configure a revenue center or menu item class to use the Popup Condiment Orderer, the feature is turned off. You can use a mix of the settings. For example, you can set the revenue center to use the Popup Condiment Orderer, and set specific menu items to use the revenue center parameter, other menu items to use a different Popup Condiment Orderer, and some menu items with no popup.

Best practices

Oracle's MICROS recommends the following best practices when configuring the Popup Condiment Orderer.

- If you configure required condiment groups with a zero minimum count, select the **Manually dismiss Condiment Orderer** option. Otherwise the Popup Condiment Orderer automatically closes because the system meets the minimum required count (zero) before the operator orders a condiment in the group.
- When you designate Next Page/Panel for menu items (in menu item classes and on menu item buttons), Ops goes to the designated page or panel after the Popup Condiment Orderer closes (either manually or automatically).
- If you must use gestures on transaction pages, set the Condiment Edit Popup to No Popup for the menu item classes, and use the Recall Popup Condiment Orderer function key to modify previously ordered required condiments.

Using the Popup Condiment Orderer

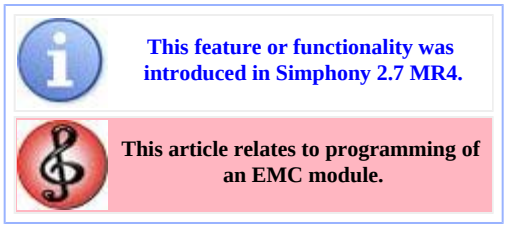
1. Sign in to an Ops client (workstation).
2. Select a parent menu item that has required condiment groups. The Popup Condiment Orderer appears.
3. Select a required condiment. The Popup Condiment Orderer automatically advances to the second group, and so on until you have selected the required number of condiments from all groups.
4. After you meet the minimum count, click **Done** to move to the next condiment group or to dismiss the Popup Condiment Orderer.

   If you click **Done** without selecting the minimum count of a condiment group, Ops remains on the current condiment group and the Done button text changes from Done to what is needed (for example, Select 2 to 3 Steak Sauce Current Count:1). When you use devices running the Android or iOS mobile operating systems, you receive an error stating that the required condiment group is not complete for the parent menu item.

To modify a previously ordered required condiment:

1. Select a menu item (condiment or parent) in the check detail area. The Condiment Edit Popup appears if it is configured in the RVC Parameters module or Menu Item Classes module.
   - To edit a menu item when the Condiment Edit Popup is not configured:
   a. Select the menu item (condiment or parent) in the check detail area.
   b. Select the function key or button for **Recall Popup Condiment Orderer**.
2. Change the condiments, and click **Done**.

Popup Condiment Orderer



Contents

- 1 Understanding the Popup Condiment Orderer
- 2 Configure a Popup Condiment Orderer page
- 3 Configure revenue center to use Popup Condiment Orderer
- 4 Configure menu item class to use Popup Condiment Orderer
- 5 Best practices
- 6 Using the Popup Condiment Orderer
- 7 See also

Understanding the Popup Condiment Orderer

The Popup Condiment Orderer provides a screen workflow that automatically advances to all required condiment groups when ordering menu items.

The Popup Condiment Orderer resides in a template. The operator uses this template to create a page that will pop up for required condiments. When adding a menu item (for example, Steak) that requires condiment selection to a transaction, the page with the template appears as a popup to select the required condiment groups (for example, meat temperature and sauce).

The operator can also recall a Popup Condiment Orderer to modify the required condiments of a previously ordered menu item. The operator can select the parent item or condiment in the check detail or select the Recall Popup Condiment Orderer function key (depending on configuration).

Unlike the regular Condiment Orderer, the Popup Condiment Orderer automatically pops up and closes.

Configure a Popup Condiment Orderer page

1. In the EMC, select a level (enterprise, zone, property, or revenue center), select Configuration, and then select **Page Design**.
2. Insert a new record (page).
3. Enter a record name (for example, Popup Condiment Orderer).
4. Select **Specify Template** and then select **Popup Condiment Orderer** from the Internal Templates list. This template is pre-filled with a Condiment Orderer control and a Done button. You cannot delete these elements from the template, nor can you copy elements to this template. The Popup Condiment Orderer template supports two key functions: Void and Transaction Cancel.
5. In the Popup Type drop-down list, select where you want the Popup Condiment Orderer to appear on the page. (The Popup Types do not apply to Ops clients running the Android and iOS mobile operating systems.)
    - Full Screen

- Centered
- Next to Check Detail Area
- In Dynamic Content Area

6. Select **Allow selection in check detail area** if you want operators to select the current menu item and its condiments in the check detail area while the Popup Condiment Orderer is open.
7. Select **Manually dismiss Condiment Orderer** to have the Popup Condiment Orderer remain open after the operator selects all required condiments. The operator must use the Done function to close the Popup Condiment Orderer.
8. (Optional) Change the page settings, such as layout and button styles. You cannot modify the dimmed settings.
9. (Optional) Repeat steps 2 through 8 for each Popup Condiment Orderer page you want to create. Ops only requires one page for initial condiment selection and subsequent editing. However, you can configure two pages.
10. Save the changes.

Configure revenue center to use Popup Condiment Orderer

1. In the EMC, select the revenue center, select Setup, and then select RVC Parameters.
2. Enter information for the following General fields.

Field	Description
Default Condiment Ordering Popup	Select the default automatic popup that will appear when the operator orders a menu item with required condiments for the revenue center: ▪ None ▪ Popup Condiment Orderer
Default Condiment Editing Popup	Select the default automatic popup that will appear when the operator selects a menu item with required condiments in the check detail area for the revenue center: ▪ None ▪ Popup Condiment Orderer

3. Save the changes.

Configure menu item class to use Popup Condiment Orderer

The Popup Condiment Orderer configuration in the Menu Item Classes module overrides the revenue center configuration in the RVC Parameters module.

1. In the EMC, select a level (enterprise, zone, property, or revenue center), select Configuration, and then select **Menu Item Classes**.
2. Select the menu item class.
3. Enter information for the following General fields.

Field	Description
Condiment Order Popup	Select the automatic popup that will appear when the operator orders a menu item with required condiments: ▪ No Popup ▪ Use Revenue Center Parameter ▪ Popup Condiment Orderer
Condiment Edit Popup	Select the automatic popup that will appear when the operator selects a menu item with required condiments in the check detail area: ▪ No Popup ▪ Use Revenue Center Parameter

	▪ Popup Condiment Orderer

4. Save the changes.

If you do not configure a revenue center or menu item class to use the Popup Condiment Orderer, the feature is turned off. You can use a mix of the settings. For example, you can set the revenue center to use the Popup Condiment Orderer, and set specific menu items to use the revenue center parameter, other menu items to use a different Popup Condiment Orderer, and some menu items with no popup.

Best practices

Oracle MICROS recommends the following best practices when configuring the Popup Condiment Orderer.

- If you configure required condiment groups with a zero minimum count, select the **Manually dismiss Condiment Orderer** option. Otherwise the Popup Condiment Orderer automatically closes because the system meets the minimum required count (zero) before the operator orders a condiment in the group.
- When you designate Next Page/Panel for menu items (in menu item classes and on menu item buttons), Ops goes to the designated page or panel after the Popup Condiment Orderer closes (either manually or automatically).
- If you must use gestures on transaction pages, set the Condiment Edit Popup to No Popup for the menu item classes, and use the Recall Popup Condiment Orderer function key to modify previously ordered required condiments.

Using the Popup Condiment Orderer

1. Sign in to an Ops client (workstation).
2. Select a parent menu item that has required condiment groups. The Popup Condiment Orderer appears.
3. Select a required condiment. The Popup Condiment Orderer automatically advances to the second group, and so on until you have selected the required number of condiments from all groups.
4. After you meet the minimum count, click **Done** to move to the next condiment group or to dismiss the Popup Condiment Orderer.

   If you click **Done** without selecting the minimum count of a condiment group, Ops remains on the current condiment group and the Done button text changes from Done to what is needed (for example, Select 2 to 3 Steak Sauce Current Count:1). When you use devices running the Android or iOS mobile operating systems, you receive an error stating that the required condiment group is not complete for the parent menu item.

To modify a previously ordered required condiment:

1. Select a menu item (condiment or parent) in the check detail area. The Condiment Edit Popup appears if it is configured in the RVC Parameters module or Menu Item Classes module.
   - To edit a menu item when the Condiment Edit Popup is not configured:
   a. Select the menu item (condiment or parent) in the check detail area.
   b. Select the function key or button for **Recall Popup Condiment Orderer**.
2. Change the condiments, and click **Done**.

See also

Condiments

Print Controller

*A **Print Controller** is a service that sends print jobs to a printer. Each Ops process has a built-in Print Controller, thus it is typical that a workstation acts as a Print Controller. When an operator performs an action that causes a guest check, order, or other printing type to print, the Ops process does not communicate directly with the printer receiving the print job. Instead, the Ops process sends a message to the Print Controller (usually another workstation) that controls the printer. This Print Controller then receives notification that the print job succeeded or failed, and routes the success/fail information back to the workstation that sent the print job.*

This article contains a **best practices** section.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses a **technical topic** that is not intended for all readers.

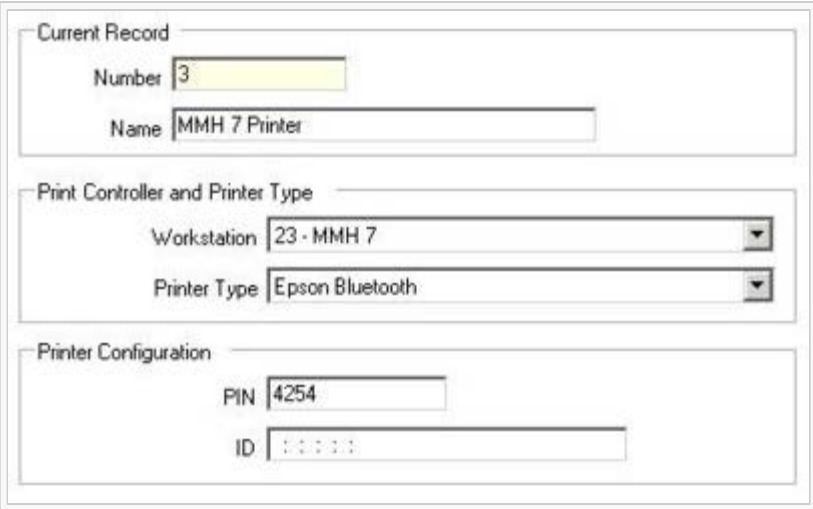
Contents

- 1 EMC Configuration
- 2 Configuration Considerations
  - 2.1 Good Configuration
  - 2.2 Problem Configuration
  - 2.3 Best Practices
- 3 See also

EMC Configuration

In the EMC Printers Module, each printer is configured with a workstation as its Print Controller. In the case of OPOS Printers, the Epson Thermal RS232 Roll Printer, and IDN Roll Printer, and a Slip Printer, the printer is physically connected to the workstation. Bluetooth Printers and Ethernet Roll Printers aren't physically connected to the Print Controller, but they only receive print jobs through the workstation configured as the Print Controller.

***Note:** EMC allows printers to be controlled by workstations only. While the Print Controller service is technically a standalone service that can run on any PC, such functionality is unavailable at this time. Currently, all Print Controllers are workstations.*



A bluetooth printer configured in the EMC Printers module. The Print Controller for this printer is Workstation #23, "MMH 7".

Configuration Considerations

A single Print Controller may control multiple printers, which is not uncommon.

Good Configuration

A common example may be where a single workstation controls:

- The local printer that is physically attached to the workstation. This printer is used for Guest Checks, Customer Receipts, etc.
- The Hot Food printer (remote Ethernet Kitchen Printer).

In this configuration, if the workstation loses power or network connectivity, it will not be possible for other workstations to print to either of these printers. This is generally not a problem, because the print jobs will print to their backup printers as appropriate.

Problem Configuration

In another example, a single workstation controls:

- The local printer that is physically attached to the workstation.
- The Hot Food printer (remote Ethernet Kitchen Printer).
- The Cold Food printer (remote Ethernet Kitchen Printer), which backs up the Hot Printer.

In this configuration, if the workstation loses power or network connectivity, it will not be possible for other workstations to print to any of these printers. In this situation, no order chits will print to the Hot or Cold printers in the kitchen; it is likely that the kitchen operations will be severely impacted.

Best Practices

Based on the information above, it is clear that the best programming practice is for primary and backup printers to reside on two different Print Controllers. While this may not always be possible, this configuration prevents a single point of failure (one powered-off Print Controller) from causing multiple remote printers to stop printing.

In addition, employees in a Revenue Center should be aware of which workstations are acting as Print Controllers for remote printers. This knowledge will help the users to troubleshoot printing problems.

See also

- Print Manager

Printing	Printing · Printers (EMC Module) · Bluetooth Printing · IP Printer · Order Device

(Hardware)	· **Print Controller** · Roll Printer · Slip Printer · Hardware Specs
Learning series: Printing	

Print Customer Receipt

The **Print Customer Receipt** function key (524) is used to print a customer receipt after a transaction has finished. This key is used in Revenue Centers where the On Demand Customer Receipt functionality is being used. For more information, see the On Demand Customer Receipt article.

This article discusses the usage of one or more **Function Keys**. (524)

This article discusses functionality that relates to **Printing**.

See also

Check and Receipt Printing	By-Round Guest Check · Guest Check Headers and Trailers · On Demand Customer Receipt · On Demand Guest Check · **Print Customer Receipt**
Learning series: Check and Receipt Printing	

Printer Hardware Specifications

This article discusses **Hardware Specifications** for various printer models used in the Simphony system. This page may not list every supported BIOS version for every printer, however this page does list known supported versions (and where applicable, known *unsupported* versions). In general, a "known supported version" refers to a version that was used in testing.

This article discusses a topic related to **hardware**.

This article discusses functionality that relates to **Printing**.

Contents

- 1 Citizen CMP-10
- 2 Epson TM-P60
- 3 Epson TM-U295 RS-232 Slip Printer
- 4 Bixolon-SPP-R200II
  - 4.1 Hardware Self-Test
- 5 MICROS Mini Printer
- 6 See also

Citizen CMP-10

The Citizen CMP-10 is a Thermal Roll Printer. It is an incredibly compact printer which accepts 2.25" x 85' (57mm x 26m) thermal paper rolls commonly used in many thermal calculators. The printer connects to a workstation through an RS-232 cable. The primary advantage of using this printer is that it contains a rechargeable lithium-ion battery, which makes it an ideal compliment to the KW270 which can also run on battery power. The CMP-10 will automatically power itself off if it remains idle for more than 10 minutes. The printer includes Bluetooth and IrDA interfaces, however these are not supported in Simphony. This printer also does not autocut.

Model: CMP-10
Supported Versions: 2.20EN
Website: CMP-10 (http://www.citizen-systems.com/product.aspx?id=88)
Introduced: Simphony 1.4

Hardware Self-Test

To verify the BIOS version, follow these steps:

```
Model CMP-10 Ver 2.20EN

Intensity:   100 %
Timeout:     10 min
Temperature: 24 C
Battery:     [*****]
Mode:        RS232
Speed:       9600 bps
Switches:    0 0 0 0 0 0 0 0
```

These are the expected results of a self test for the Citizen CMP-10.

1. Ensure printer is powered off
2. Press and hold the LF (Line Feed) button
3. While still depressing LF, press and release ON/OFF button
4. Release LF button

Note that the battery indicator shows an asterisk (*) to represent the charge. Five asterisks represents 100% charge (or close to 100%), whereas two asterisk represent a charge of around 40%.

Epson TM-P60

This information is for the RS-232 version of the P60, introduced in 1.4

Model: TM-P60
Supported Versions: 2.02 ESC/POS
Website: TM-P60 (http://www.pos.epson.com/product.aspx?id=88)
Introduced: Simphony 1.4

Much like the Citizen CMP-10, the Epson TM-P60 is also a compact Thermal Roll Printer which accepts 2.25" x 85' (57mm x 26m) thermal paper rolls commonly used in many thermal calculators. The printer connects to a workstation through an RS-232 cable. The primary advantage of using this printer is that it contains a rechargeable lithium-ion battery, which makes it an ideal compliment to the KW270 which can also run on battery power. The TM-P60 will automatically power itself off if it remains idle for more than 20 minutes. The printer includes Bluetooth OR WiFi interfaces, however WiFi is not supported in Simphony.

```
Firmware Version 2.02 ESC/POS

Baud rate:      19200 bps
Data bits:      8 bits
Parity:         none
Stop bit:       1 bit or more
Handshaking:    RTS/CTS
Receive error: ignore

Auto Power Off Time
  20 min

Print Density
  100%

Paper Roll Width
  58mm
```

These are the expected results of a self test for the Epson TM-P60.

Hardware Self-Test

To verify the BIOS version, follow these steps:

1. Ensure printer is powered off
2. Press and hold the LF (Line Feed) button
3. While still depressing LF, press and release ON/OFF button

Important Configuration Notes

For this printer to operate properly on a KW270, the printer's internal DIP switches should be changed. These DIP switches can be found by opening the printer, removing the paper roll, and removing a small dark-gray rubberized covering. The settings should be changed to:

1. OFF (down)
2. OFF (down)
3. ON (up)
4. OFF (down)

Epson TM-U295 RS-232 Slip Printer

For information about this printer, see Slip Printer: Supported BIOS.

Bixolon-SPP-R200II

This information is for the Bluetooth Bixolon-SPP-R200II printer, introduced in Simphony 1.6 MR6. This printer is also supported on Simphony v2.x.

Model: Bixolon-SPP-R200II
Supported Versions: V01.04 STOBa 041613
Website: Bixolon-SPP-R200II (http://www.bixolon.com)
Introduced: Simphony 1.6 Maintenance Release 6

The BIXOLON SPP-R200II is a small and lightweight mobile receipt printer. It provides fast, On Demand printing with speeds up to 80mm per second (3.15inches/sec). The SPP-R200 also utilizes a long-life Lithium-ion battery with a 8 hour continuous operation life. The integrated Magnetic Card Reader allows credit cards to be processed immediately at the point of transaction, increasing customers' sense of security since the credit card does not leave their sight.

Hardware Self-Test

Self-Test Instructions

1. Turn the printer power off and close the printer paper cover.
2. Pressing the paper feed button and power button simultaneously turns the printer on.
3. The printout is produced after releasing the two buttons.
4. To add a printout of the ASCII pattern, press the paper feed button once more.
5. After the ASCII pattern is printed out, the self-test is automatically terminated

See the Bluetooth Printer Bixolon-SPP-R200II Setup article for more information.

```
Firmware version:
    V01.04 STOBa 041613
Buffer Capacity : 128K Bytes
Print Density : 100 %
Serial Interface
  -Baud rate : 115200 bps
Data bits    : 8 bits
Parity       : None
Stop bit     : 1 bit or more
Handshaking  : DTR/DSR
Default Codepage  : PC437
Print Speed : Max. 90mm/s
Double byte character mode:Off
Font : 12x24
Paper out Bell : Off
Low Battery Buzzer : On
Black mark : Off
Power off time : 0 Min
Idle mode time : 0 Sec
MSR data including sentinel
character mode : None
MSR read mode : MSR disable
BATT NTC : OK

Memory switch setup status

Memory S/W1-8 (switches 1-8)

RF Interface

BT embedded
Bluetooth firmware version :
    1.0.1
Bluetooth BD address :
     XXXXXXXXXXXX
  -Auth. & Encry. are enable
  -Connection Mode = 2
Not available WLAN
```

These are the expected results of a self test for the Bixolon-SPP-R200II.

MICROS Mini Printer

The MICROS Mini Printer was introduced with the release of Simphony 1.6 Maintenance Release 6 for use with the

recently introduced mStation (See Simphony 1.6 Maintenance Release 4).

This printer has ***no*** Self-Test capabilities. Also, this printer is ***not*** compatible with the Print and Loopback tests in the current mTablet/mStation Diagnostics Utility or other confidence tests. Additionally, it is not compatible with the Epson printer command set. An updated mTablet Diagnostics Utility with MICROS Mini Printer support will be introduced in a platform software release in the near future.

See also

Printing (Hardware)	Printing · Printers (EMC Module) · Bluetooth Printing · IP Printer · Order Device · Print Controller · Roll Printer · Slip Printer · **Hardware Specs**
Learning series: Printing	

Printers (EMC Module)

"Printer" redirects here. For other uses, see Printing

In EMC, the **Printers Module** is the location where a programmer configures the physical printing devices that are used in a Property.

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

This article discusses a topic related to **hardware**.

This article discusses functionality that relates to **Printing**.

Contents

- 1 EMC Configuration
  - 1.1 OPOS Printer
  - 1.2 Bluetooth Printer
  - 1.3 Epson RS232 and other Serial Printers
  - 1.4 Ethernet Roll Printer
  - 1.5 Local Disk File
  - 1.6 IDN Roll Printer
- 2 See also

EMC Configuration

The **Printers** module is accessed from the Property Scope, under the "Property Hardware" header. Each printer record has a configurable Name field and Print Controller, in addition to the Printer Type. After a Printer Type is selected, different configurable fields are available:

OPOS Printer

There are five **OPOS** configuration fields; this should be configured according to the documentation of the OPOS device: Device Name, Printer Columns, Printer ID, "Use Near Empty as Empty", and "Buffer Output".

Bluetooth Printer

Main article: Bluetooth Printing

Epson RS232 and other Serial Printers

For more about Slip Printers, see Slip Printer

The **Slip Printer** type was introduced in Simphony 1.2.

There are five configurable fields for the **Epson RS323 Roll Printer** and the **Epson TM-U295 RS232 Slip Printer** types: COM Port, Baud Rate, Parity, Data Bits and Stop Bits. The default values for these are:

- COM Port: COM1
- Baud Rate: 9600
- Parity: None
- Data Bits: 8
- Stop Bits: 2

Ethernet Roll Printer

Main article: IP Printer

Local Disk File

The **Local Disk File** printer type was introduced in Simphony 2.0.

When using a **Local Disk File** printer, the only configurable field is the File Name where the output will be generated. A Local Disk File printer is designed for testing purposes. The file name is a file that exists in the local directory on the client. If a full path and file name are given, the file will exist in that location; if only a file name is given, the workstation will create the file in the local directory where the OPS process was started.

IDN Roll Printer

There are seven configurable fields for the **IDN Roll Printer**: COM Port, Baud Rate, Parity, Data Bits, Stop Bits, IDN ID, and "Enable Logo Printing".

See also

- Workstations (EMC Module)

Printing (Hardware)	Printing · **Printers (EMC Module)** · Bluetooth Printing · IP Printer · Order Device · Print Controller · Roll Printer · Slip Printer · Hardware Specs
Learning series: Printing	

Print Group

The **Print Group** field is a user-configured value used to sort menu items. Print groups are programmed in the Menu Item Class module; new MI Class records are created with a default value of 1.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Uses
- 2 EMC Configuration
- 3 See also

Uses

Print Groups control sorting on various types of print jobs including order chits, guest checks, and customer receipts. However, it is most common that print groups are used for order devices. Print Groups may be used to:

- Sort by preparation time (items that take longer are sorted first)
- Sort by meal course (appetizers before entrees)
- Sort specific condiments last (See condiments)
- Change the print group of parent menu items (a condiment called "as appetizer" changes a regular item's print group. See condiments)

EMC Configuration

There are two locations in EMC where Print Groups can be configured as the sorting method:

- RVC Parameters - On the Format Tab, the following fields can be configured to sort by print group:
  - Screen Sort Type (Guest Check Detail Area)
  - Customer Receipt Sort Type
  - Guest Check Sort Type
- Order Devices - On the General Tab, the Sort/Consolidation field determines how order devices will display order chits.

For more information on sort/consolidation methods, see Sort/Consolidation Methods.

See also

- Menu Item Class
- Sort/Consolidation Methods

Printing Right To Left Reading Languages

Contents

- 1 Concept
- 2 Configuring right to left reading languages
  - 2.1 Setting enterprise language
  - 2.2 Setting workstation language
  - 2.3 Setting secondary print language
  - 2.4 Create Print Language List button
- 3 Using multiple language printing
- 4 See also

The Right-To-Left reading orientation option was introduced in Simphony 2.7 GR.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses functionality that relates to **Printing**.

Concept

You can show guest check detail and print a receipt showing both primary and secondary languages configured for the property. For example, English and Arabic can appear on the guest check detail area and print on the same receipt. When configured, all areas of the check show both languages, except the check number, table number, and employee name/number. These numerals print in the primary language.

Configuring right to left reading languages

Setting enterprise language

To show Ops guest check detail and print customer receipts and guest checks in the right to left orientation configured for a language:

1. In the EMC, select Enterprise, select Setup, and then select **Languages**.
2. Double-click the language record.
3. Select **Right-To-Left** to have the check detail area and customer receipt appear in Ops and print in right-to-left orientation.

You can print custom numerals on a customer receipt or guest check. For example, Arabic digits can print on the receipt rather than Latin digits. However, Simphony version 2.7 does not support custom numerals in the Ops check detail appearance.

Setting workstation language

1. In the EMC, select Property, select Setup, select Workstations, and then select **General**.
2. Select the language you want to appear on the workstation from the Language list.

You can override the default language on the workstation for specific employees using the Employee Maintenance module. Employees with a different language configured in Employee Maintenance see that language after signing in to the workstation.

Setting secondary print language

To print the secondary print language:

1. In the EMC, select Property, select Setup, select Property Parameters, and then select **General**.
2. Select primary and secondary languages from the Language 1 and Language 2 lists.
3. Select the language from the Select Secondary Print Language list. Selecting **0 – None** causes only the default language to print. When printing multiple languages, the system prints item names in the order configured for the property.
4. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Setup, select Format Parameters, and then select **Options**.
5. Select option **[52 – Print Secondary Language on Guest Checks/Customer Receipt]**.

Create Print Language List button

When printing multiple languages, you can have each server select the language from a list in Ops using the Print Language List button.

1. In the EMC, select Enterprise / Property / Revenue Center / Zone level, select Configuration tab, and then select **Page Design**.
2. Add a button to the appropriate screen with the function **Print Language List**.

Follow these steps to create the Print Language X button(s). This configures a button to select a specific language. For example, if the secondary language is Arabic, configure the Print Language 2 button to print the receipt in Arabic.

1. In Page Design, add a button to the appropriate screen with the function **Print Language 2**.
2. Optionally, create another button with the function **Print Language 3**.

Using multiple language printing

To change the language for the receipt when more than two languages are being used:

1. Sign in to Ops and ring the menu items.
2. Click **Print Language List**.
3. On the Change Print Language dialog box, select the language.
4. Print the customer receipt.

If the Print Language 2 button is configured, click **Print Language 2**.

See also

Languages
Simphony 2.7

Printing tax rate per item

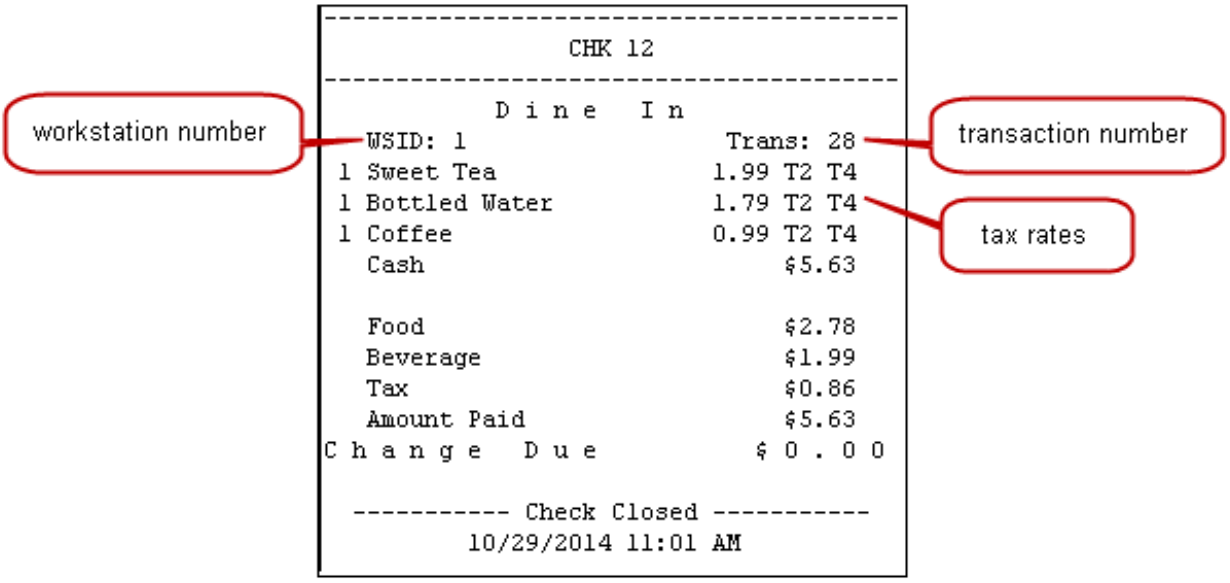
Contents

- 1 Sample customer receipt
- 2 Configuring tax rates per item to print on guest check, customer receipt, and journal
- 3 See also

This feature or functionality was introduced in Simphony 2.7 MR2.

Sample customer receipt

The following example illustrates a sample customer receipt printed with the tax rates for each menu item, workstation number, and transaction number.



Configuring tax rates per item to print on guest check, customer receipt, and journal

Note: It is recommended that you enable Report Parameters option **[23 - Save the Final Check Image]** when using **[16 -**

Print Tax Rate per item].

To print a menu item's tax rate on guest checks and customer receipts:

1. In the EMC, select Enterprise / Zone / Property / Revenue Center, select Setup, select Tax Parameters, and then select **International Options**.
2. Select option **[16 - Print Tax Rate per item]** to have any tax rates associated with the menu item class print on the guest check and customer receipt. When you deselect option **[16]**, the tax rates do not print on the guest check, customer receipt, or journal.

For example, the line item for a BLT on the printed check appears as follows:

1 BLT 5.99 T2 T4

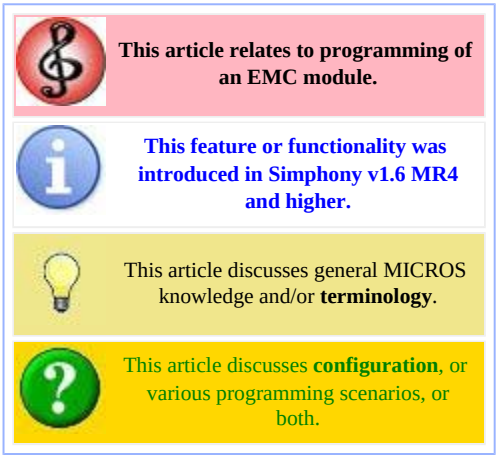
The guest check and customer receipt indicate the tax rate applied to each item. The T2 and T4 shown after the item’s price indicate that tax rates 2 and 4 were applied to a BLT.

See also

- Tax Parameters
- Format Parameters

Production Items for KDS

This article reviews the functionality and configuration steps to enable ***Production Items for KDS Systems***.



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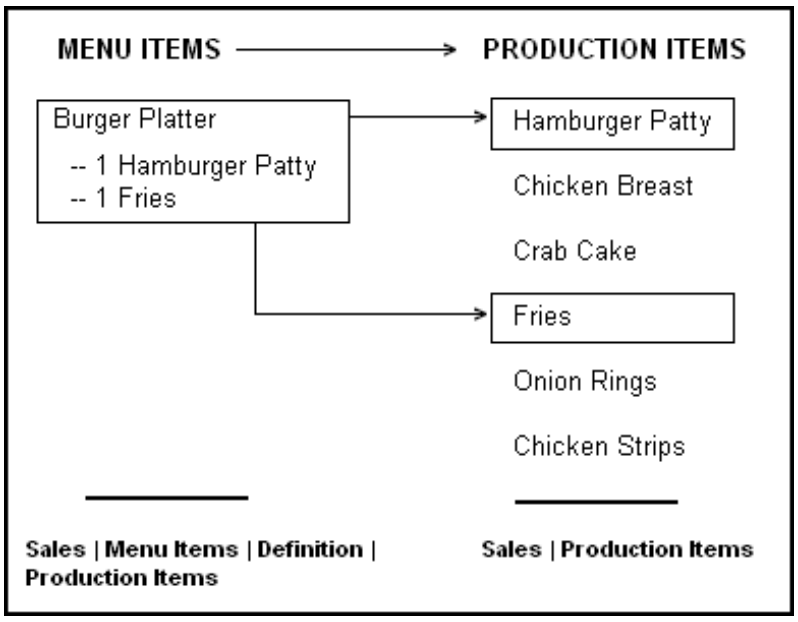
Overview

The Production Item feature allows users to link Menu Items that are prepared in a similar manner (e.g., French Fries, Hamburger Patties) and send them to pre-selected KDS prep stations. These items can then be grouped together and displayed in bars either above or below the order chits. The Production Item feature was designed for the kitchen environment that has staff working in an assembly-line fashion. It allows the cooks to concentrate on their specialties or portions of an order. Production items can be used in either Dynamic Order Mode (DOM) or non-DOM environments.

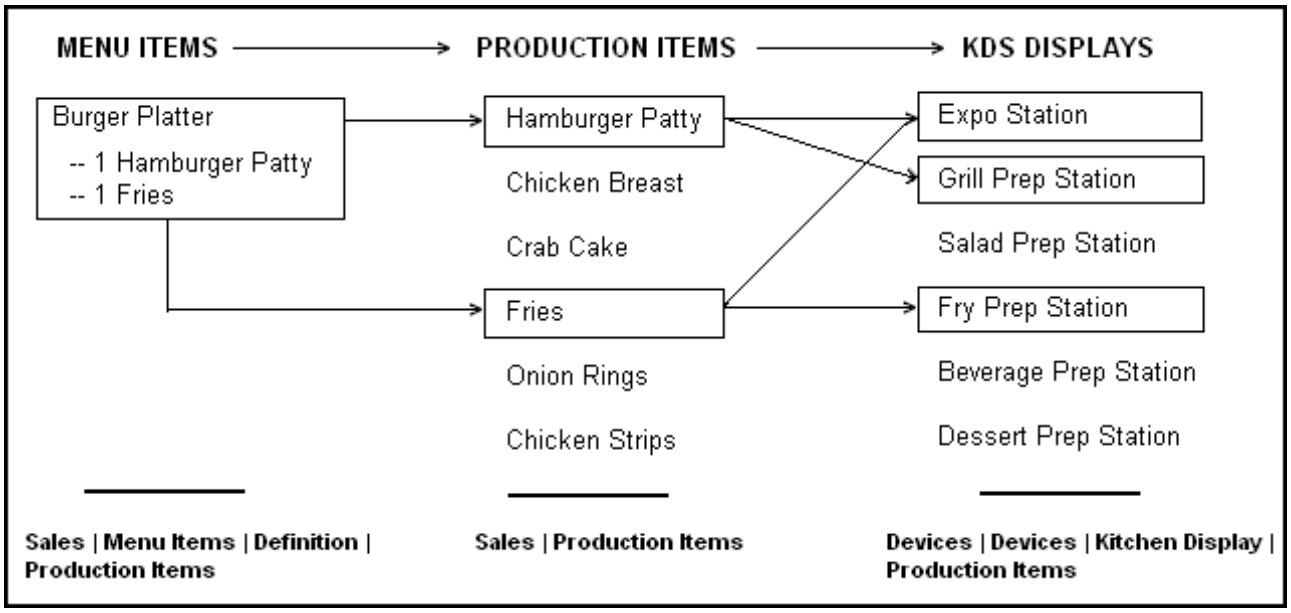
How It Works

During setup, users create an unlimited number of Production Item records. The production items represent portions of menu items that can be prepared in batches

(e.g., Fries) or in lots (e.g., Burgers). A menu item can include one or more production items. For example, a Burger Platter can be linked to both the Burger and the Fries production items.



Once defined, users specify which production items will be displayed at each KDS prep station. This is done by linking them to the station's order device. Each production item may be shown on more than one KDS display. In the following diagram, both the Burger and Fries production items are sent to the Expo station as well as their respective prep stations.

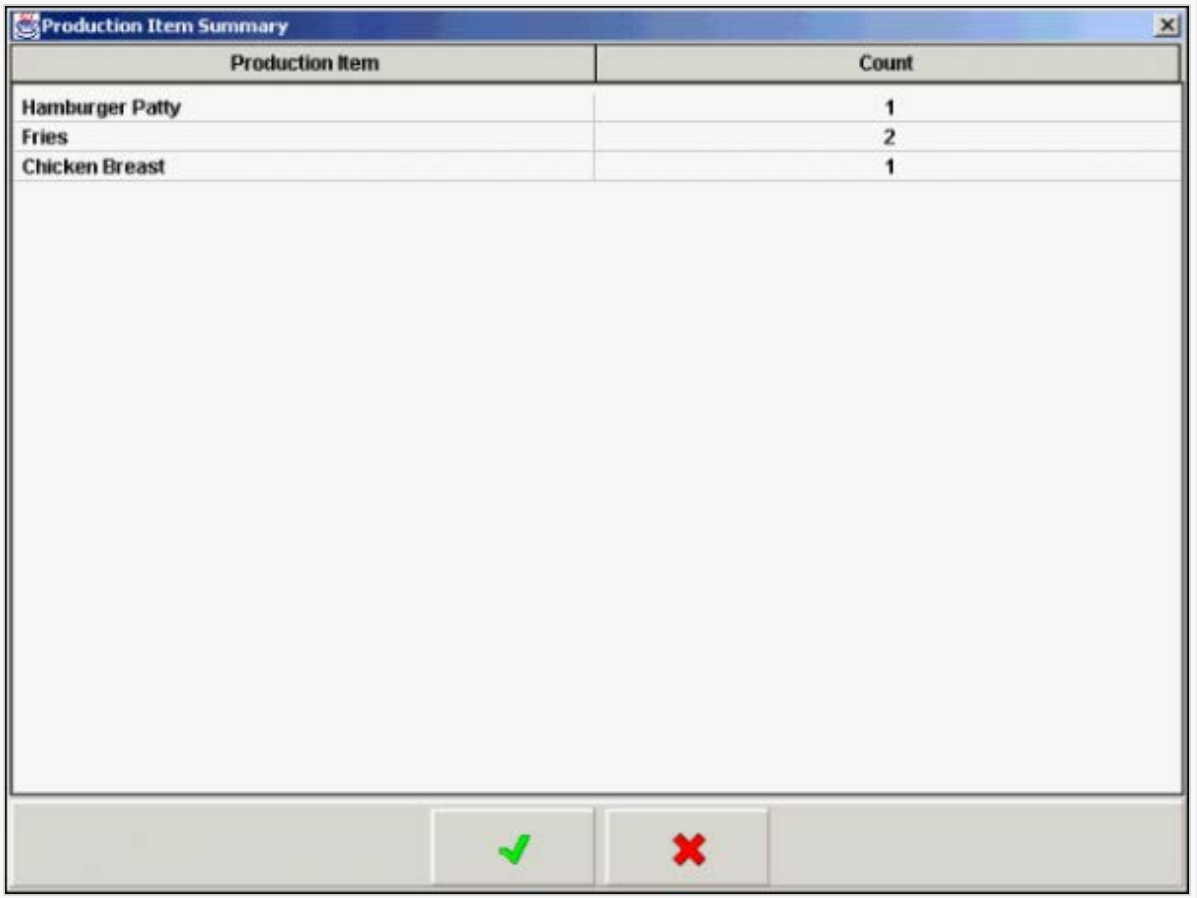


Note: Since it is a system-wide variable, the Production Item total represents the sum of all such items currently in the kitchen. To view only those items relevant to the local device, operators can add a touch key to display a **Production Summary** for that station.

Production Summary

Occasionally, operators

will need to review the status of their own production items. To do this, a Production Summary key may be added to the KDS Tool bar or Bump bar. The key acts as a toggle switch to open and close a device-specific list of current production items.



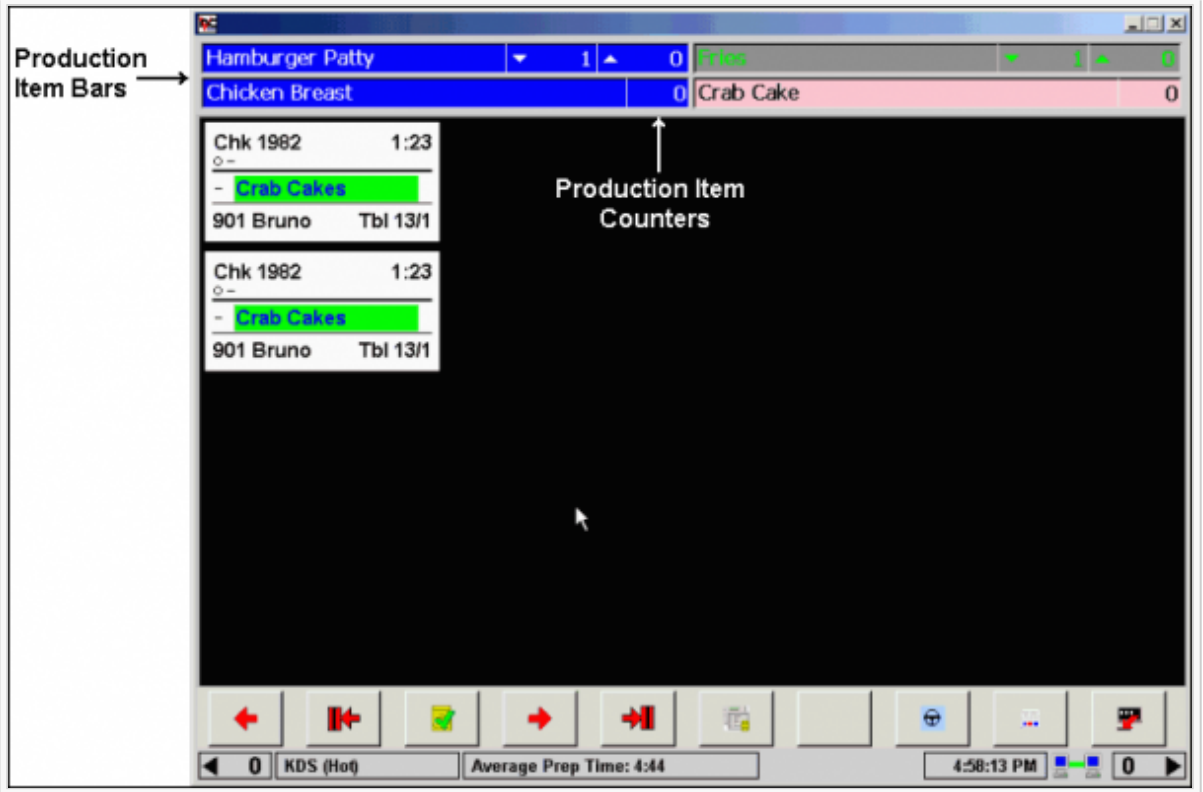
KDS Production Item Summary

Production Bars

On the KDS device, production items are grouped together in bars that span the width of the screen. As part of setup, users specify whether the bars will display above or below the order chits. To conserve space, up to 5 production items can be shown per Production Bar, with the following guidelines:

- If the number of columns configured is less than the number of production items sent, the system will simply start another production bar.
- If the number of columns configured is greater than the number of production items sent, the system will fill the bar with the number of columns that it has.

For example, if the device allows up to 5 production items to display per production bar, but only 3 production items are sent to the display, the system will space the three bars to fill out the entire horizontal width of the display. It will not



KDS Production Item Bars & Counters

insert blank columns just to fulfill the 5-column maximum. Similarly, if the defined maximum is 4 production items, and the number sent is 7 production items, the system will display 4 columns in the first line, then the remaining 3 on the second line. The columns on the second line will retain the column widths from the first row, inserting (in this case) a blank 4th column to complete the bar.

- Production names may be truncated to allow adequate spacing for the production item counters.
- The number of production items per bar is set at the KDS device level.

To differentiate between them, users can set the foreground and background colors for each production item in the KDS display. This is a system-wide option and cannot be changed at the device level.

Production Item Counters

The production items listed on the KDS display include a name and at least one counter to track the number of portions that the prep cook must make. The number of counters depends on whether the production items are tracked individually or relative to other items on the check (i.e., using item prep times).

Single Counter

A single counter is used when a simple count of production items is required. All items are started immediately and the count is incremented and decremented when those production items are added or bumped from the screen. This is the method described in **Example 1** below. It can be used in both DOM and non-DOM environments.

EXAMPLE 1

The kitchen in the Mike Rose Grill has a designated grill station that is responsible for making hamburgers. The restaurant offers several menu items made with a grilled hamburger patties, including:

- #1 Burger Combo (1 patty)
- Cheeseburger Deluxe (1 patty)
- Burger Platter (1 patty)
- Double Burger Platter (2 patties)

All of these menu items are linked to a production item called “Hamburger Patty”. The option '**Single Item Per Suborder**' (**Devices** | **Order Devices** | **KDS** | **Options**) is also enabled.

During lunch, a check is started that includes one of each item. When the order is sent to the kitchen, chits for each menu items appear on the Grill station’s KDS display. At the top of the screen, the Hamburger Patty production item counter is automatically incremented by 5.

The prep cook responds by putting 5 patties on the broiler. When the burgers are finished, the prep cook bumps them from his display and the production count is decremented by 5. At this point, the expediter makes the sandwiches and plates the rest of the orders for the server.

Over/Under Counters

When item prep times are used, a single counter is no longer sufficient. This is because the production items are no longer tracked as individual events, but as part of a larger order. To ensure that all parts of the order are served at their best, it may be necessary to wait before starting the production item while other parts of the order are prepared. In this case, two counters are required. These are referred to as Under/Over counters. During operations, the Over counter shows how many portions should be started immediately, while the Under counter indicates how many will be needed soon. This method works best in a non-DOM environment.

Shelf Life

The mechanism for determining when a production item should be started is the item’s shelf life. This is similar to an item prep time, in that it specifies the amount of time needed to prepare the production item before the order is plated. The difference, in this case, is that the production item is not a separate menu item, per se. It is part of another menu item. In this sense, the shelf life represents a portion of the menu item’s prep time. It is the amount of time needed to prepare the production item before its parent item is completed.

EXAMPLE 2

The Mike Rose Bar & Grill offers several menu items that include a single portion of fries, among them are:

- Burger Platter — Item Prep Time = 5 minutes
- Chicken Sandwich Deluxe — Item Prep Time = 6 minutes
- Rib-Eye Special — Item Prep Time = 10 minutes

All of these menu items are linked to a production item called “Fries”, which have a shelf life of 4 minutes. The option '**Single Item Per Suborder**' (**Devices** | **Order Devices** | **KDS** | **Options**) is also enabled.

During dinner, a check is started containing all three of these menu items. When the check is service totaled,

the system calculates the **Target Done Time (TDT)** for the order by looking for the longest item prep time. In this case, the longest prep time is 10 minutes (Rib-Eye Special). This becomes the 'TDT' for the entire order.

When the order is sent to the Fry prep station, the system compares the shelf life of the Fries to the 'TDT' and determines that it is too soon to start cooking. The 'Over' counter is incremented by 3 portions. At the 6-minute mark, the order is 4 minutes from being plated, which means the threshold for preparing the Fries has been reached.

The system subtracts 3 Fries from the 'Over' counter and adds them to the 'Under' counter. This is the fry cook's alert to drop 3 portions of Fries. When finished, the cook bumps the chits, subtracting 3 portions from the 'Under' counter.

Incrementing/Decrementing the Counters

In the preceding examples, production counters were incremented as soon as the check was service totaled and decremented when the suborder was bumped from the display. Other options are available. These options are set by accessing the **EMC** | **Property** level | **Property Hardware** | **KDS Controller** | '**General**' tab | **Production Count** section. These settings will apply to all of the KDS devices for the Property.

Production Count Increment Type

- **Incrementing Counters** — Users have two ways to increase the production item counters on a KDS display:
  - **Sent from POS** — The production counters increase as soon as the check is service totaled. If an order contained two or more production items (e.g., Burger Platter = hamburger patty, portion of fries), the chits would display on all prep stations (and could be started) simultaneously.
  - **Fired from Expo** — The production counters increase when the check is sent to the KDS. This option is used with the item timing feature, and is recommended for use in a non-DOM environment. When applied to checks with two or more menu items, each having its own production items, it controls when the production item over/under counters will actually be incremented.

For example, using the item prep times listed in **Example 2**, you would expect the Rib-Eye Special to be fired as soon as the check is service totaled.

Four minutes later, the Chicken Sandwich should be fired, and one minute after that — at the 5-minute mark — the Burger Platter should display.

This is, in fact, what occurs. When the order is sent to the KDS, the chit for the Rib-Eye Special is displayed immediately — along with its portion of Fries. Notice that a separate chit is not provided for the Fries. In this scenario, Fries are simply an attribute of the Rib-Eye Special, more than a condiment, but not exactly a side item.

When the chit is displayed at the KDS stations, the 'Over' counter for Fries production items increments by 1. Four minutes later, the chit for the Chicken Sandwich displays, increasing the Fries 'Over' counter to 2. At the five-minute mark, the chit for the Burger Patter appears. Once again, the Fries 'Over' counter increments, indicating that 3 portions of Fries will be needed soon.

At the 7-minute mark, the Fries need to be started and the count of three Fries is deleted from the 'Over' counter and added

to the 'Under' counter.

Production Count Decrement Type

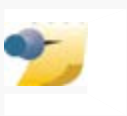
- **Decrementing Counters** — There are three methods for decreasing production item counters on a KDS display. For illustration purposes, the following descriptions refer to a single menu item (Burger Platter) with two production items (hamburger patty, fries), displayed on three prep stations (Grill, Fries, Expo):
  - **First Prep Done** — The production counters decrement on all three devices when any of the three prep station bumps the chit from his display. This only affects the production counter -- not the chit itself.

For example, if the fries are finished first, the production counters will be decremented on all stations as soon as the Fry prep cook "*dones*" his chit. The chit will continue to display on the Grill and Expo stations until "*doned*" at those stations.

If the Fries are bumped first, the system will...	Grill	Fries	Expo
Clears Chit	No	Yes	No
Decrements Counter	Yes	Yes	Yes

- **All Prep Done** — The production counters will not decrement on any of the stations until all the prep stations have bumped the item. The chits remain visible at each KDS station until bumped from their respective displays.

If the Fries are bumped...	Grill	Fries	Expo
Clears Chit	No	Yes	No
Decrements Counter	No	No	No
Once the Burger is bumped...	-	-	-
Clears Chit	Yes	Yes	No
Decrements Counter	Yes	Yes	Yes



Note: When using '**All Prep Done**' to decrement the production counters, the Revenue Center and Order Devices must be configured consistently with regard to Dynamic Order Mode (DOM). That is, all order devices must be set to DOM when the Revenue Center is in DOM and all Order Devices must be set to non-DOM when the Revenue Center is in non-DOM.

- **Expo Done** — The production counters will not decrement on any station until bumped from the Expo station.

Once again, the chits remain visible at each KDS station until bumped from their respective displays.

If the Fries are bumped...	Grill	Fries	Expo
Clears Chit	**No**	**Yes**	**No**
Decrements Counter	**No**	**No**	**No**
Once the Burger is bumped...	**-**	**-**	**-**
Clears Chit	**Yes**	**Yes**	**No**
Decrements Counter	**No**	**No**	**No**

Voiding Production Items

Menu item voids can also decrement the production counters — but only if the item is still in the kitchen at the time of the void. Once the menu item is done and bumped from the display, the production count decrements naturally. Since production counters only track the number to be prepared, they are not affected by completed items or previous round voids.

For example, a user starts a check by ringing up a void of a Burger Platter. The Burger Platter menu item includes two production items — 1 Burger Patty and 1 Fries.

When the void is fired, the KDS Controller attempts to match the Burger Platter item with an existing item in the kitchen. If a match is found, the production count is decremented by one Burger Patty and one Fries.

If match is not found, the void is recorded, but the production counters are not changed. Decrementing is unnecessary because the system assumes that the Burger Platter is already done. At this point, the void may be required to correct the check total, but it does not affect what items need to be made at this time.

Using Production Items

Throughout this description, the examples have defined production items within the context of their parent menu items. This is the primary use for the feature. It is by no means the only application.

Production items can also be linked to defined menu items (an order of fries, for example) or to condiments

(the side of fries that completes a combo meal). The table shown here provides a list of considerations when linking each to production items in KDS.

Included with Parent Item	A la carte Menu Item	Condiment or Side Item
• Always prints on same chit as parent item – even in a *SIPS environment. • Included in cost of parent. • Included in the parent menu item prep time. • Uses shelf life value to determine when the production item will be started, relative to the parent item and/or other menu items on the check.	• Will display on own chit in a *SIPS environment. • Priced separately. • Uses own menu item prep time. • Shelf life entry should be set to 0.	• Can be displayed with or without parent item in a *SIPS environment. • If priced, the amount is added (subtracted) from the parent item price. • May have own item prep time. If defined, adds (subtracts) from the parent item prep time. • Shelf life entry should be set to 0.

***(SIPS)= Single Item Per Sub-Order – KDS Option**

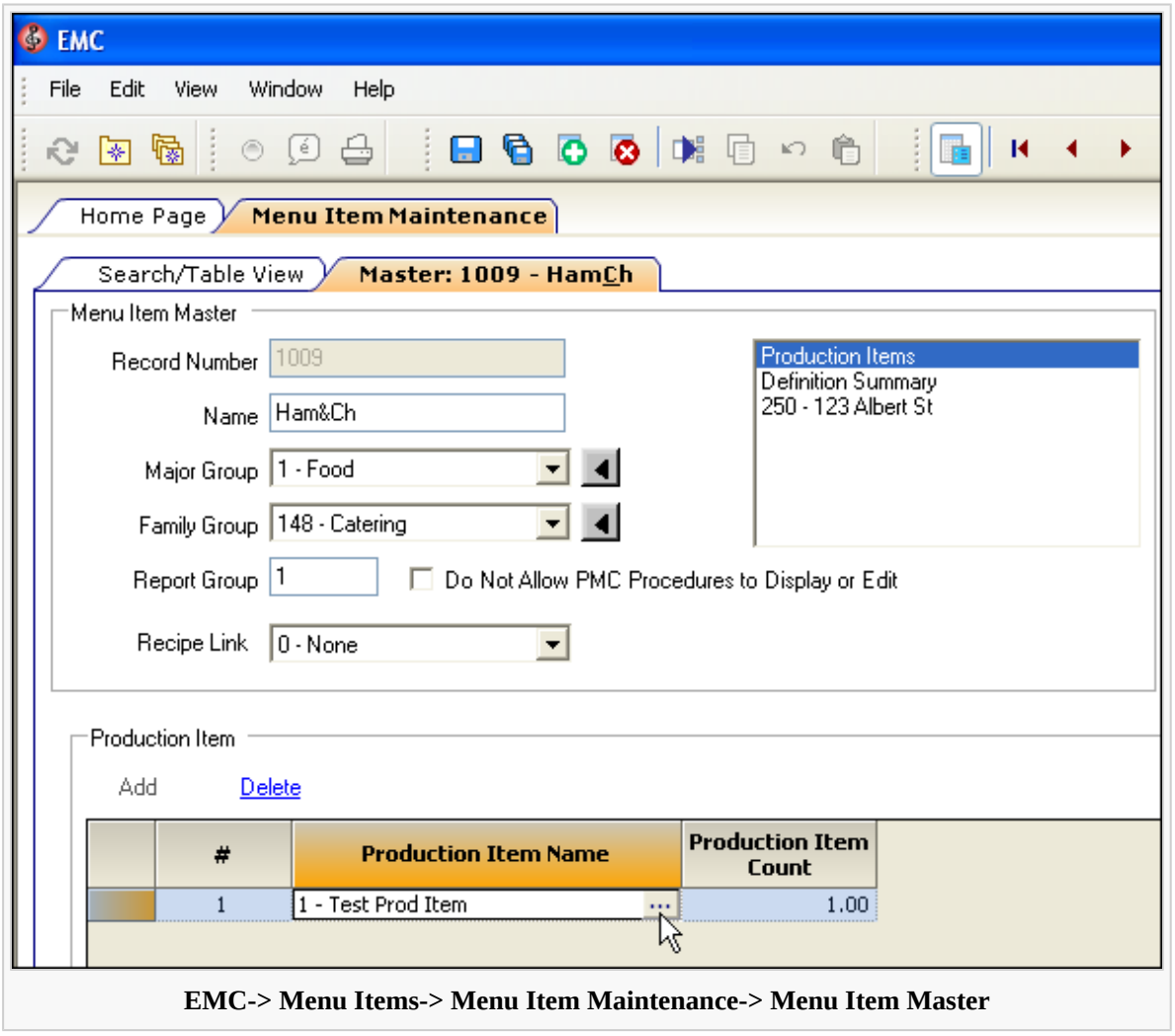
Step-by-Step Procedures

This section describes the procedures required to create Production Items and display them on the KDS devices.

Define the Production Items

Follow these steps to define production items and link them to the appropriate menu items:

1. Open the EMC | **Property** level and select **Sales** | **Production Items**.
2. Click the '**Insert**' icon to add a new record to the table.
3. Enter a **Name** for the production item (e.g., Hamburger Patty). The name should clearly identify what is being prepared for each menu item that is being tracked.
4. From the **KDS Highlight Scheme** drop-down list, select the style to be used when displaying the text and background colors for this production item on KDS devices.
5. In the **Shelf Life** field, specify the amount of time needed to prepare this production item portion before the order is plated. This option controls whether one or two counters will be displayed with the production item. If the value is set to '**0**', a single counter is displayed. The prep cook starts the item as soon as it is displayed and bumps when finished. If the value is greater than '**0**', an 'Over/Under' counter is used. The 'Over' counter indicates how many items should be started immediately, while the 'Under' counter indicates how many will be needed soon. The counts are based on the production item's shelf life, relative to the longest prep time in the order. As the order times progress, the system uses this shelf life value to determine when to move the items from the 'Over' counter (prepare soon) to the 'Under' counter (prepare now).
6. Click the '**Save**' icon to save the record.
7. Open the **Menu Items** | **Menu Item Maintenance** module and search the **Menu Item Master** record type.
8. Highlight and open the desired **Menu Item Master** record and toggle to Form view. From under the **Menu Item Master** header select the, **Production Items** filter and a **Production Item** window will display below.



EMC-> Menu Items-> Menu Item Maintenance-> Menu Item Master

Complete the table as follows:

- Click the '**Add**' link.
- Click in the **Production Item Name** field to open the drop-down list of defined production items. Select the appropriate entry (e.g., Hamburger Patty).
- In the **Production Item Count** field, enter the number of portions that will be needed to complete this menu item. For example, a Hamburger would require a single hamburger patty, while a double-cheeseburger would need 2 of them.
- Click the '**Save**' icon to save the record.

9. More than one production item may be linked to the same menu item. For example, a Hamburger Platter might be linked to two production items — to Hamburger Patty and to Fries. To add another production item, click the '**Insert**' icon and complete the **Production Item Name** and **Production Item Count** fields for each additional item.

10. Click the '**Save**' icon to save the record and close the form.

Link to the KDS Devices

Follow these steps to specify which production items will be displayed on each KDS device:

1. Open EMC and select the **Property** | **Property Hardware** | **KDS Displays**.

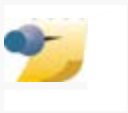
2. Highlight a KDS device and toggle to Form view.

3. Go to the **General** tab | **Production Item** tab.

4. From the **KDS Production Location** drop-down box, specify where to place the production items on the KDS display. The options are:

- **1 - Top** = above the order chits
- **2 - Bottom** = below the order chits and above the KDS tool bar, if used.

5. From the **KDS Production Columns** drop-down box, specify the number of production items that will be included per line or production bar. Up to '**5**' are allowed.



Note: Where possible, the system will display the maximum number of items in each bar. If there are not enough items to fill the last bar, the remaining items will be evenly distributed across the line.

6. Go to the **Production Item** area.

7. In the **Production Item Name** field, click the '**Add**' link and select a production item to display on the highlighted KDS device. Click the '**Save**' icon to save the record. To add additional item(s), click the '**Add**' link and repeat the select/save process until all of the production items to be displayed at this KDS station have been added to the list.

8. Repeat Steps 3-7 until all of the KDS devices have been configured.

9. Click the '**Save**' icon to save the record.

Set the System Options

Follow these steps to specify how production items will be handled on all KDS devices:

1. Open EMC and select the **Property** | **Property Hardware** | **KDS Controllers**.

2. Go to the **General** tab.

3. From the **Production Count Increment Type** drop-down list, specify when an ordered item will be added to the production counter. The options are:

   - Sent from POS
   - Fired from Expo (This option is ***not*** recommended for use in DOM).

4. From the **Production Count Decrement Type** drop-down list, specify when a "*doned*" item will be subtracted from the production counter. The options are:

   - **First Prep Done** — For menu items that appear on two or more prep stations, decrements the count when the item is bumped from any of the prep stations.
   - **All Prep Done** — Decrements the count when all prep stations have bumped the item. To work, the revenue center and all of its order devices must be set to either DOM or non-DOM mode.
   - **Expo Done** — Decrements the count when the order is bumped from the expo station.

5. Click the '**Save**' icon to save the record.

Configure the Tool Bar

Follow these steps add a touch key to display a summary of production items specific to the KDS device.

1. From the EMC | **Property** level | **Property Hardware** | select **KDS Tool Bars**.
2. Select a KDS Tool Bar record from the **Name** list and toggle to Form view.
3. Highlight an existing **KDS Function** key or click the '**Add**' button to add a new button, if appropriate.
4. Click in the **Function** field and select **Production Summary** from the list.
5. From the drop-down list, specify the **Background Color** for the button.
6. From the **Foreground Color** drop-down list, specify the text color to be used to identify this button (i.e., the **Legend**).
7. In the **Legend** field, enter a name for this button.
8. Click the '**Save**' icon to save the record.

Configure the Bump Bar

Follow these steps add a touch key to display a summary of production items specific to the KDS device.

1. From the EMC | **Property level** | **Property Hardware** | select **KDS Bump Bars**.
2. Select a bump bar configuration from the **Name** list and toggle to Form view.
3. Highlight an existing **Scan Code Value /Function** key or click the '**Add**' button to add a new button, if appropriate.

4. Click in the '**Function** field and select **Production Summary** from the list.
5. Enter the appropriate **Scan Code Value** to indicate the location of the button on the Bump Bar.
6. Click the '**Save**' icon to save the record.

See also

- Simphony 1.6 Maintenance Release 4
- Kitchen Themes

Order Devices	Order Device · Order Device Redirection · Order Device (PMC Procedure) · Autofire · Dopplebon Printing · Hold and Fire · How Menu Items Print · Kitchen Themes · Local Order Receipt · Order Device Routing by Order Type Setup · **Production Items for KDS** · Routing Group · Secondary Printing
Learning series: Order Devices	

Property

A **Property** is a place of business; in Simphony, the term generally refers to a collection of Revenue Centers within a confined geographic location. For example, a hotel property in Chicago may have three RVCs (restaurant, bar, and room service), while a shopping mall property in Atlanta may have several dozen fast transaction type RVCs. Both properties may belong to the same Simphony System (Enterprise), but each property will have its own sales figures, tax information, and other location-specific configuration.

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

Contents

- 1 Property / RVC Relationship
- 2 EMC Configuration
  - 2.1 Adding Properties
    - 2.1.1 Adding to mymicros.net
  - 2.2 Distributing Properties
  - 2.3 Deleting Properties
    - 2.3.1 Prerequisites
    - 2.3.2 Errors
    - 2.3.3 Audit Trail
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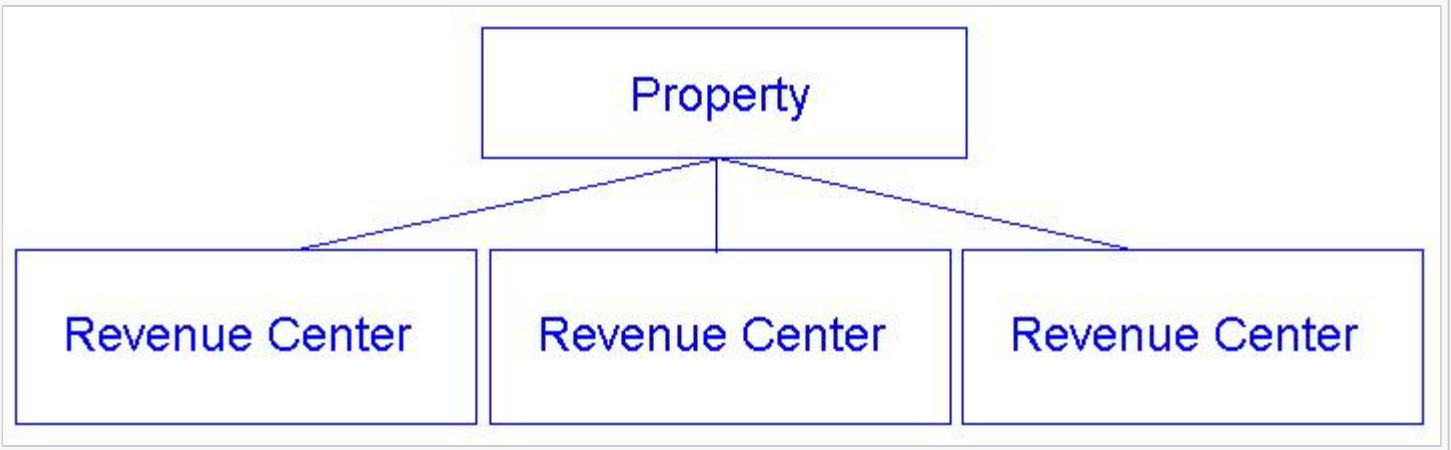
- 3 See also

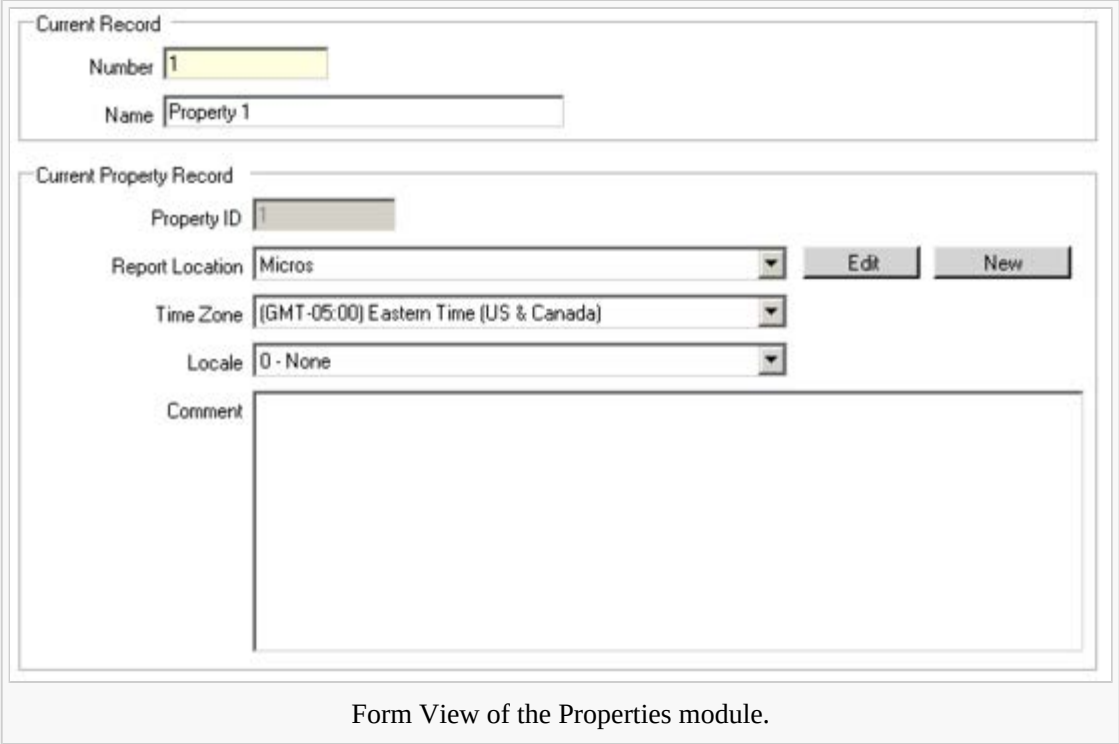
Property / RVC Relationship



In this image, the property has three Revenue Centers. This could be an example of the "Chicago hotel", as described above. These RVCs might be a Restaurant, a Bar, and Room Service.

EMC Configuration

Property Records are configured in the **Properties** module, which is located on the Enterprise Scope of EMC. There are only a few configurable fields in the properties module:



Form View of the Properties module.

Name
: Enter a name that describes the property. Up to 32 characters are allowed.

Property ID
: This field displays the Property ID of this Property. The ID is the database ID, and it is not editable. This field is provided for troubleshooting purposes when log messages (etc.) reference the Property ID instead of the object number. Additionally, this field may be used in the configuration of some interfaces or other third-party applications.

Report Location
: Select the Reporting Location. The choices in this list are generated from the mymicros.net (reporting) database. A user can add a new location by using the "New" button, or edit an existing location by using the "Edit" button.

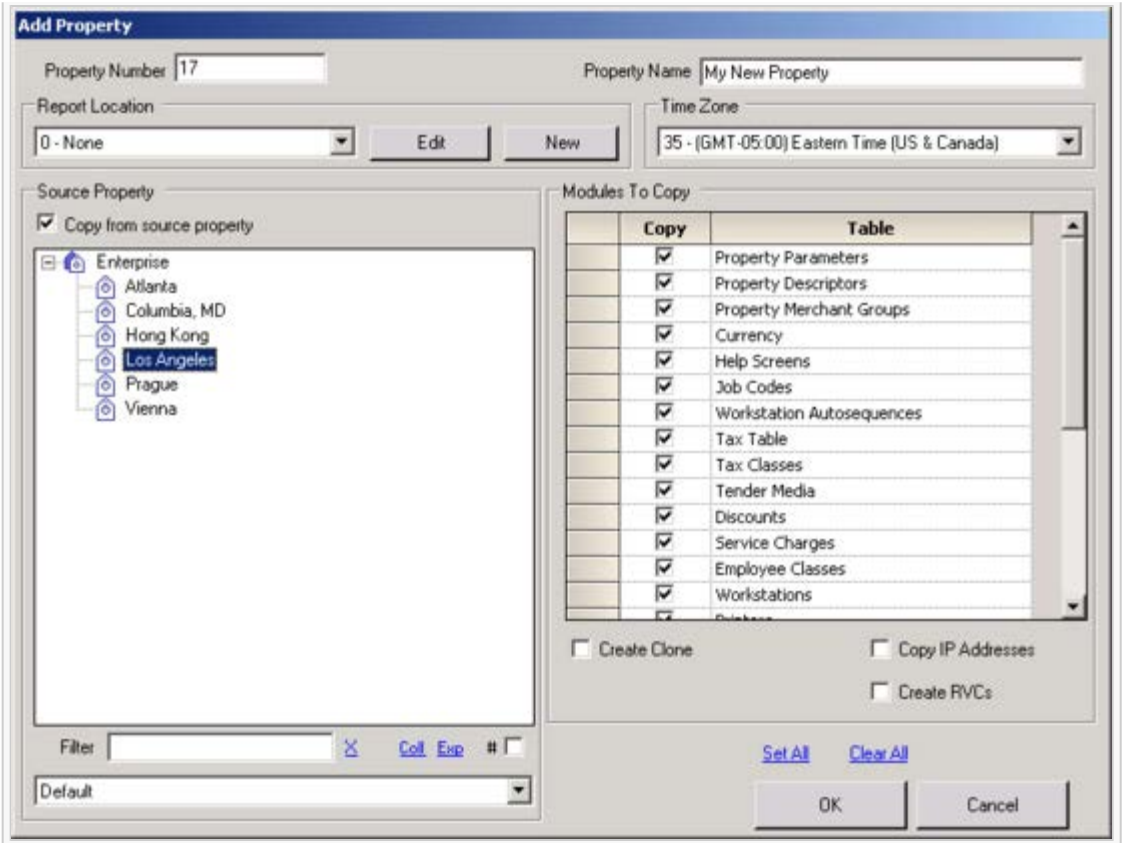
Time Zone
: Select the Time Zone where this property is located. This field's configuration helps to determine when Start of Day should run.

Locale
: Specify the Locale for the Property. Currently, the Locale controls only the "dot" and "comma" separator settings used on workstations. If this field is set to 0-None, the Property will default to using "." for the decimal separator and "," for the thousands separator.

Comment
: Enter a comment, if necessary, that describes the property. This field allows users to enter any desired comments about the property; the field allows 2000 characters and it is not translatable.

Adding Properties

When the Insert button is pressed in the Properties module, the standard insert dialog is not displayed. Instead, the user sees a special dialog for adding properties. In this dialog, the following fields can



The Add Dialog in the Properties module of EMC.

be configured:

Property Number
: In this field, enter the Object Number for the property. This field allows a range of 1-999,999,999.

Property Name
: Enter the name of the property. Note that this dialog does not allow name translations. To translate the property's name, create the property first and then edit the name.

Report Location
: Select the Reporting Location. The choices in this list are generated from the mymicros.net (reporting) database. A user can add a new location by using the "New" button, or edit an existing location by using the "Edit" button.

Time Zone
: Select the Time Zone for this Property.

Source Property
: In this box, a user can choose to create the new property by copying data from an existing property. To create a property based on a template:

- Check the "Copy from source property" checkbox. This enables the Selection Hierarchy panel, and the Modules To Copy group box.
- Select the Property that will be used as the source Property.
- Select the module(s) to be copied from the source Property.
- If applicable, check the "Copy IP Addresses" check box. When this option is checked, IP Addresses of Workstations and KDS Displays will be copied from the source Property to the destination Property.
- If applicable, check the "Create RVCs" check box. Select this option to create new RVCs for this property, based on the existing RVCs in the template property. This option should be used when the new property is essentially a "clone" of the existing property.

Note: *The **Create Clone** check box is provided to quickly check all other fields. Select this option to Copy IP Addresses of workstations and KDS Displays and to Create RVCs. In addition, all modules are checked by default when this option is selected. (They can manually be unchecked, if necessary.)*

Adding to mymicros.net

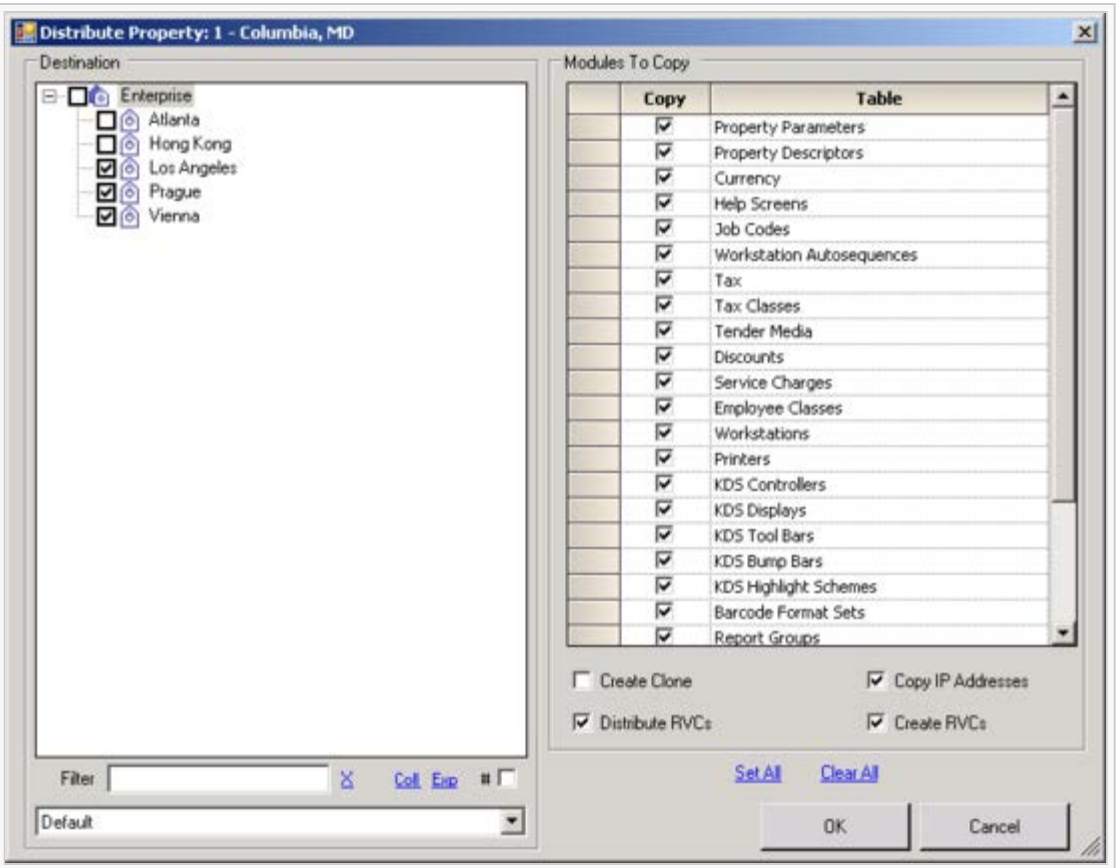
Currently, a new Property added to EMC must be manually added to the mymicros.net property list so that reports can be

taken. After adding the property in EMC, an administrative user should follow these steps:

1. Log in the mymicros.net
2. Choose Warehouse > Reporting Hierarchy > Relationships
3. Select the Reporting Hierarchy of the Enterprise
4. Choose "Assign Location"
5. Select the newly-created Report Location that was created during the EMC insert process
6. Choose "Assign"

Distributing Properties

Like other records, properties may be Distributed. Unlike other records, when the distribute button is used from the Properties module, a special distribute dialog displays. This dialog allows a user to distribute one or more of the property-scope files to another property, and also to distribute RVCs within the Property. Note that this dialog will assume that the distribution options "overwrite records if they exist" and "create records if they don't exist" are enabled. To distribute:



The Distribute dialog in the Properties EMC module. This image shows selected modules from "Property 1" being distributed to both "Property 2" and "Property 3".

1. Select a property and press the Distribute icon. The distribution dialog will display the text **Distribute Property: # - Name**, where `# - Name` represents the Number and Name of the property being distributed. The image displays "1 - Columbia, MD" as the property.
2. From the Selection Hierarchy panel choose the Property or Properties to receive the new records.
3. Select the files that will be copied.
4. If applicable, select "Copy IP Addresses." Select this option to copy IP Addresses of workstations and KDS Displays. This is intended for use when properties are segmented on their own networks and IP Address conflicts will not arise.
5. If applicable, select "Distribute RVCs." Select this option to distribute RVCs in addition to distributing the selected modules for the Property. When this option is selected, RVCs will be distributed when they exist in both properties; for example, if RVC #123 exists in both the source and destination properties, its information will be distributed. This option is intended for a user who wants to "clone" a property; thus, all modules for the RVCs will be copied, new records will be created, and existing records will be overwritten. If these are not the desired attributes for your distribution, do not check this option.

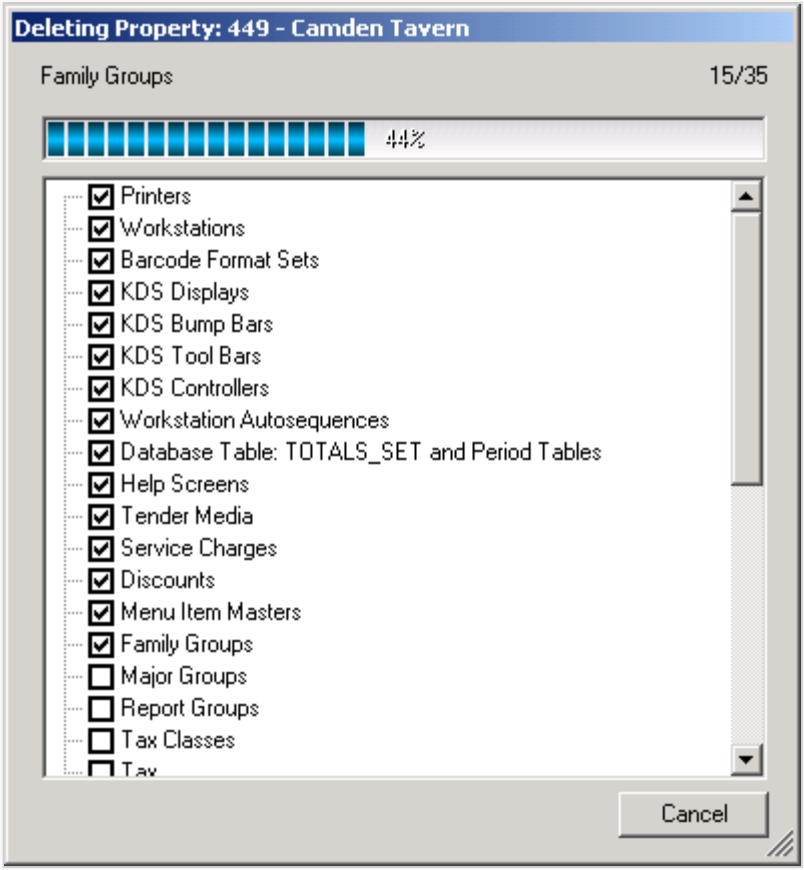
6. If applicable, select "Create RVCs". Select this option to create RVCs in the destination properties if they do not exist. This option is intended for a user who wants to "clone" a property, and it is often used for Remote Distribution. For example, in an environment where a customer uses a development system as well as a production system, the steps for Property creation will be:
    - Create the property and RVCs in the development environment.
    - After testing and determining the Property and RVCs are configured as desired, create a property in the production environment.
    - Using remote distribution, select the newly-created property as the destination, and check this option.

Note: *The* ***Create Clone*** *check box provided to quickly check all other fields. Select this option to Copy IP Addresses of workstations and KDS Displays, to distribute RVCs, and to Create RVCs. In addition, all modules are checked by default when this option is selected. (They can manually be unchecked, if necessary.)*

Deleting Properties

Deleting a property record is similar to deleting other records, but note that it is currently not possible to delete Property #1. This limitation is a result of the database upgrade process from previous products, where tables that are no longer in use by the system are referencing items related to Property #1.

When properties are deleted, a progress dialog displays all the property-scope records and database tables to be deleted. A user may press Cancel at any time to abort the deletion of the property. If Cancel is pressed, records that have already been deleted (items already checked) cannot be retrieved.



The progress dialog when deleting a property.

Prerequisites

EMC prevents users from deleting Properties that meet any of these conditions:

- The Property has one or more RVCs.
- There are one or more workstations currently playing back offline transactions.
- The Property is in a Selection Hierarchy record.
- The Service Host programmed for an Interface or a Credit Card Driver is a workstation for this property.

If one of these error conditions is encountered, EMC displays a relevant message to the user so that the offending records can easily be found and changed. In addition, EMC will prevent Properties from being deleted if any EMC modules are open for the Property.

Errors

If the property deletion operation fails, it is possible that a property can be in a "partially deleted" state. In this state, a property is missing important information from the database, such as Property Parameters information. "Partially deleted" properties are highlighted in red in Table View. From this state, a user cannot update the property; it can only be deleted.

Audit Trail

When a Property is deleted, Audit Trail logs two times. The first entry is before the deletion has occurred; the text "Property 1234, Delete Start" will be displayed. When the deletion is complete, another Audit Trail entry will be created: "Property 1234, Delete Complete".

Security Considerations

- When this module opens, the user will see all properties to which he has access, based on Employee Role Property-Level Security settings.
- A user can add Properties only when none of the user's Roles has the Enable Property-Level Security option enabled.
- Typically, very few EMC users are given access to the Properties module. Ideally, only enterprise administrators and other high-level users should be able to make changes to Properties.

See also

- Property Parameters
- Property Descriptors

Simphony Hierarchies	Enterprise · **Property** · Revenue Center · RVC Configuration · Selection Hierarchies · Zone · Inheritance and Overrides · EMC Programming Hierarchies
Learning series: Simphony Hierarchies	

Property Employee Record

A **Property Employee Record** is a property-level Employee Record; Property Employee Records are created when an employee is added to a property, and they contain information such as the Employee Class used by the employee in the property, the current Revenue Center in the property, and the Pay Rates for the employee in the property.

This article contains a **best practices** section.

This article relates to programming of an EMC module.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses functionality that relates to **Personnel**.

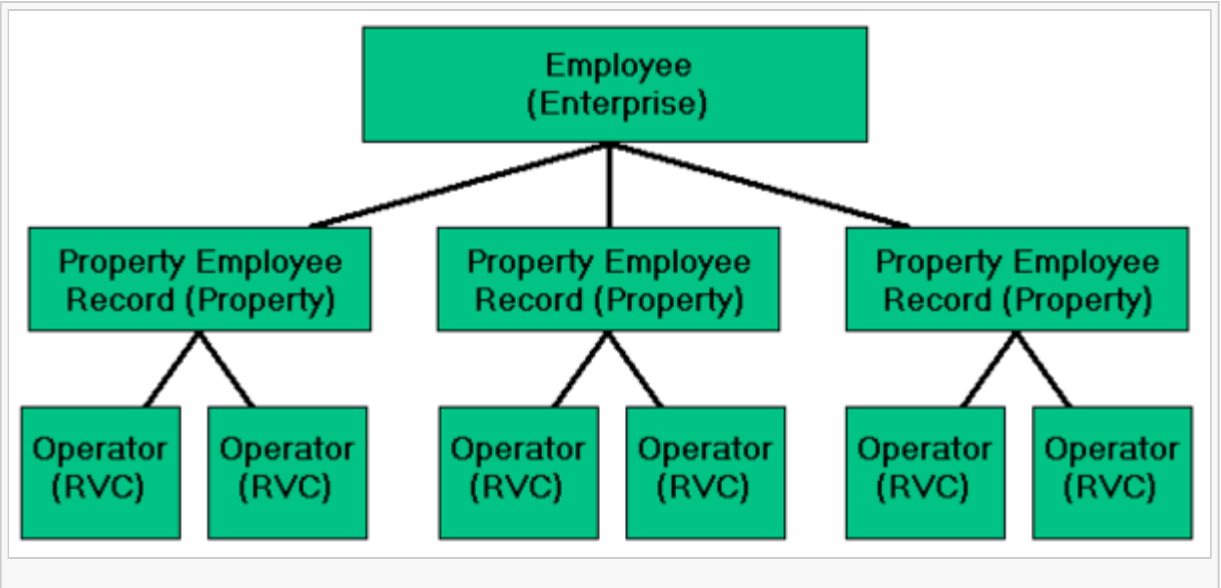
Contents

- 1 Employee Hierarchy
- 2 EMC Configuration
  - 2.1 General Tab
    - 2.1.1 Options
  - 2.2 Job Codes Tab
  - 2.3 Operators Tab
  - 2.4 Employee Fields
- 3 Adding Records
  - 3.1 Insert Property Records for an Employee
  - 3.2 Add Employees to a Property
- 4 Property-Level Security
  - 4.1 Best Practices
- 5 See also

Employee Hierarchy

When a Property Employee is created, it is linked to an Employee record.

Consider the hierarchy diagram, and assume the Employee record is "John Smith." This employee has been programmed with a Property Employee Record in three properties, and an Operator Record in two RVCs per property. If



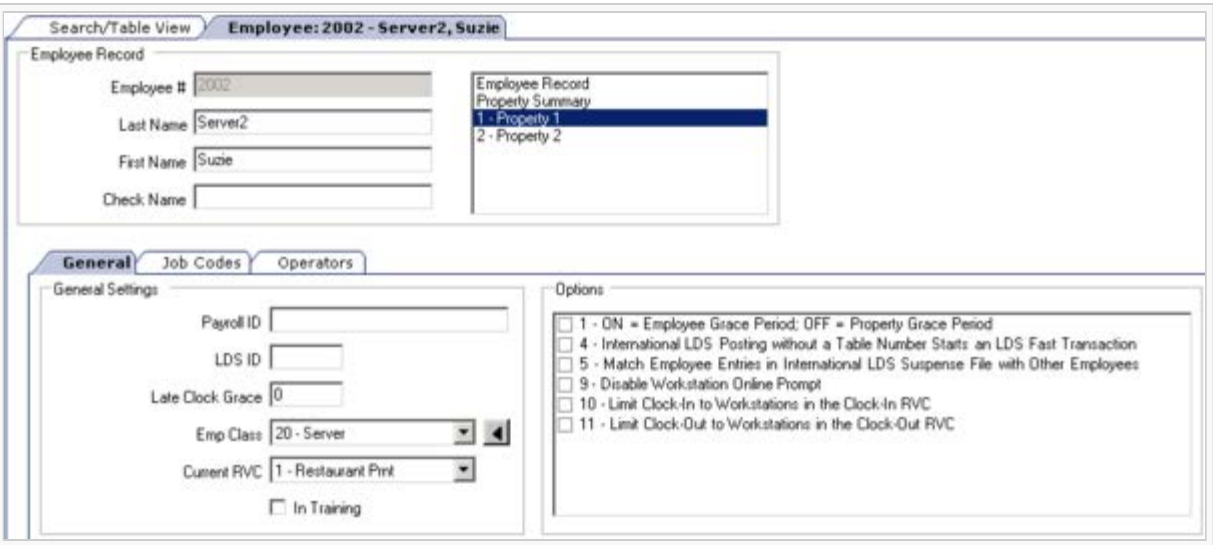
this employee attempts to sign in to a workstation in a fourth property, the operation will not be allowed, because John Smith has not been assigned to a fourth property.

This diagram shows the relationship between Employees, Property Employee Records, and Operator Records.

EMC Configuration

Main article: Employee Maintenance; specifically, see Navigating Property Employee Records

Employees, Property Employee Records, and Operator records are all configured in the Employee Maintenance module. Property employee Records contain the following fields:



The General Tab in Form View for a Property Employee Record. In Form View, the Employee's name and number display at the top of the screen, with the configurable Property Employee tabs below.

General Tab

Payroll ID
: This field may be used to enter a payroll ID number or other alphanumeric value. Note that this field should not contain a social security number or other sensitive information; this field is not encrypted.

LDS ID
: Enter a unique ID number to be used to identify the employee to a Liquor Dispensing System.

Late Clock Grace
: Each employee may be assigned a different late clock-in grace period than the one set in the Property Parameters Module. Enter the number of minutes that this employee may clock in late without being prompted or requiring authorization. The option bit, "ON = Employee Grace Period; OFF = Property Grace Period", must be selected to enable this feature.

Emp Class
: Select an Employee Class to which this employee will belong.

Current RVC
: This field represents the Revenue Center to which the employee is currently signed-in; or the Revenue Center where the employee was signed-in last. Note that if this field is set to 0-None and Timekeeping is being used, this employee will not be able to Clock In.

In Training
: Select this option to place this employee in Training Mode.

Options

The following option bits apply to each Property Employee Record:

1 - ON = Employee Grace Period; OFF = Property Grace Period
: Select this option to use the Late Clock-In Grace Period specified for this Property Employee Record. Disable this option to use the grace period programmed in the Property Parameters module.

4 - International LDS Posting without a Table Number Starts an LDS Fast Transaction
: Select this option to allow this employee to begin a fast transaction while using an International Liquor Dispensing System (ILDS). This option is not used with the North American LDS.

5 - Match Employee Entries in International LDS Suspense File with Other Employees
: Select this option to allow this employee to make entries in the LDS Suspense file (pour drinks) that may be matched to other employee's guest checks. This feature may be used in an environment in which one operator pours drinks (e.g., a bartender), and another operator collects payment for them (e.g., a cocktail server). This option is not used with the North American LDS.

9 - Disable Workstation Online Prompt
: This option controls behavior for workstations that are in offline mode and reestablish communications with the data center. If this option is enabled, this employee will not be prompted to begin working online,.

10 - Limit Clock-In to Workstations in the Clock-In RVC
: If this option is enabled, a workstation will prevent this Employee from clocking in unless the RVC of the Clock-In Cycle matches a RVC on the workstation. See the workstation message description for more information on this topic.

11 - Limit Clock-Out to Workstations in the Clock-Out RVC
: If this option is enabled, a workstation will prevent this Employee from clocking out unless the "Current RVC" field for the employee matches a RVC on the workstation. See the workstation message description for more information on this topic.

Job Codes Tab

Main article: Pay Rates

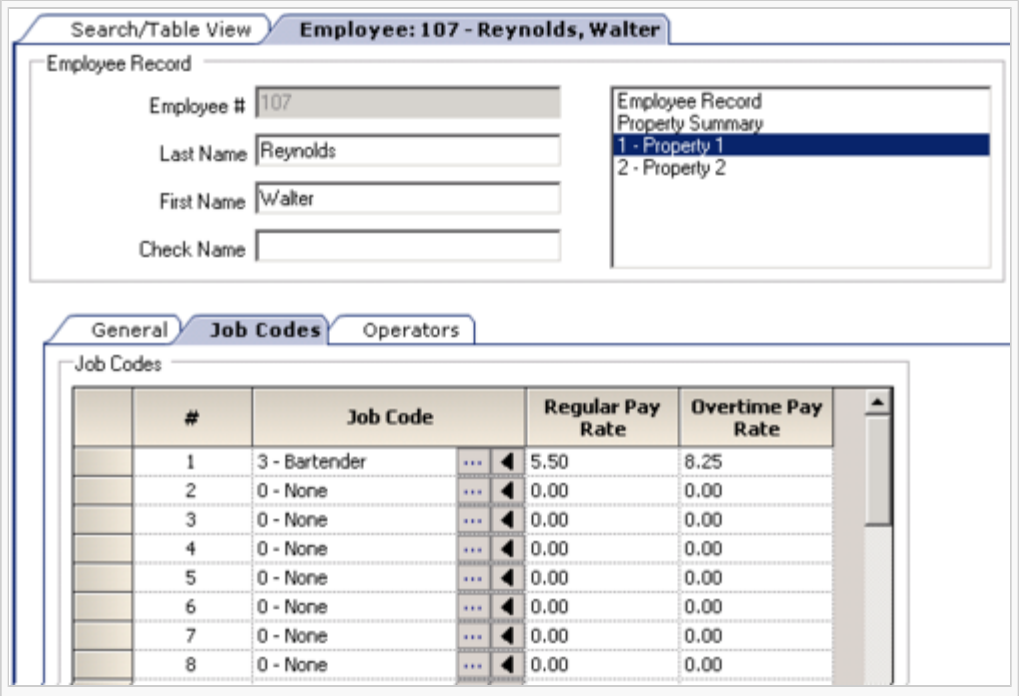
The Job Codes Tab lists all Job Codes (or Pay Rates) for the employee in the current property. There are 255 possible Pay Rates; each has three configurable fields:

Job Code
: Select a Job Code; the list displays all Job Codes from the current Property.

Regular Pay Rate
: Enter the hourly rate that the employee will earn while clocked in.

Overtime Pay Rate
: Enter the hourly rate that the employee will earn while clocked in during overtime.

Note that in this grid, a changed record highlights in yellow. This behavior usually happens only with records that



The Job Codes Tab for a Property Employee Record.

are being displayed in Table View
tables, however Pay Rates are saved to the database much like the "primary" record types of Employee Maintenance (Employees, Property Employee Records, and Operators). Because Pay Rates are included in the list of changed records, a changed row will display in yellow.

Operators Tab

The Operators Tab displays all the Operator records associated with the Property Employee Records. For more information, see Operators.

Employee Fields

Number
: This field represents the Employee Number. (This field is not configurable.)

Name Fields
: The First Name, Last Name, and Check Name fields display for the Employee Record display at the top of the form. If a user does not have privileges to edit the Employee Record fields, these fields will be disabled.

Adding Records

> *This section discusses adding Property Employee Records to existing Employee Records. For information on adding Employees, Property Employee Records, and Operators at the same time (Employee Wizard), see Adding an Employee*

Typically, Property Employee Records are added when Employees are added. However, there are times when a programmer may want to add Property Employee Records to existing Employees:

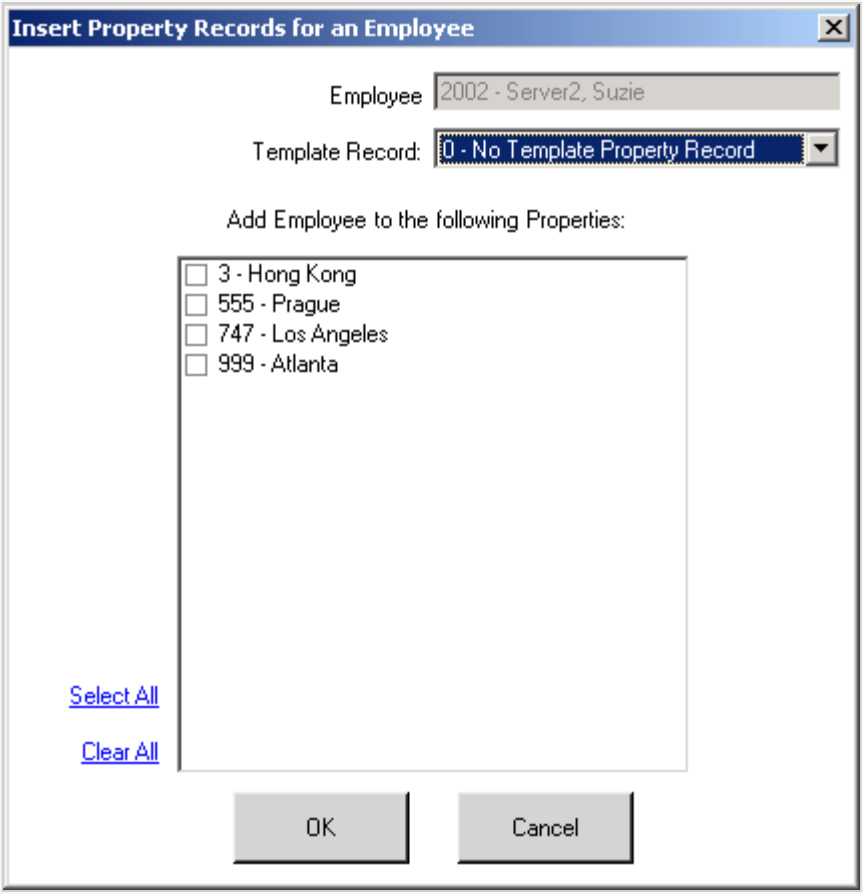
- When a new Property is created in EMC, existing employees who will be working in the new property will need to have Property Employee Records created.
- If an Employee starts working at another location.

In Employee Maintenance, there are two different dialogs for adding Property Employee Records, based on the location within Employee Maintenance when the Insert button is pressed.

Insert Property Records for an Employee

When the Insert button is pressed while viewing the Property Summary Tab in Form View, the **Insert Property Records for an Employee** displays. This dialog allows the user to add Properties for a single Employee Record. In this dialog, the following fields can be configured:

Template Record



The **Insert Property Records for an Employee** dialog is displayed when "Insert" is accessed while viewing an employee's Property Summary tab.

Choose a template Property Employee Record, or select No Template Property Record. This field displays the Property Employee Records that appear in the Property Summary grid.

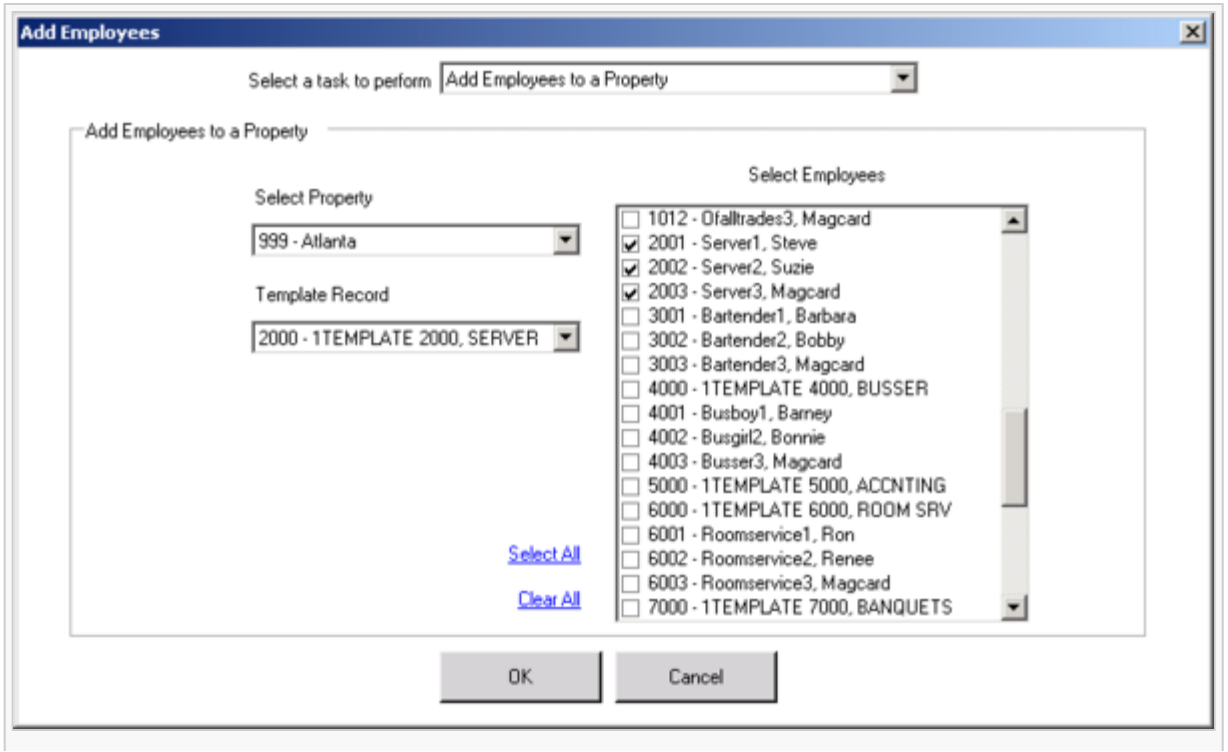
Add Employee to the following Properties

In this checked list box, select the Properties where the Property Employee Record(s) will be created.

Note that this dialog is only available when Employee Maintenance is opened from the Enterprise Scope. When viewing the "Property Summary" from the Property/RVC scope, there are no records to add because each employee already has a Property Employee Record in the selected Property. EMC will display the error, *This employee already has a Property Record in this Property. There is nothing to add.*

Add Employees to a Property

The **Add Employees to a Property** dialog is available in Table View only. This dialog allows the user to select multiple employees to add to a single Property. In this dialog, the following fields can be configured:



Select Property

Select the Property where the records will be added. If Employee Maintenance was not opened from the Enterprise

Scope, this field will be locked at the Property where Employee Maintenance was opened.

The **Add Employees to a Property** dialog in Employee Maintenance.

Template Record
: After a Property has been selected, this drop-down list displays all the Employee Records who are already assigned to the Property. Choose 0-No Template Record or select a Property Employee Record to be used as the template.

Select Employees
: In this checked list box, select the employees who will be added to the property. This list displays all the Employee Records who do not have a Property Employee Record assigned in the selected property. (Thus, each employee is listed in either the "Select Employees" checked list box or the "Template Record" drop-down list.)

Two notes about the displayed image:

- The template record in the image is "Template Server". MICROS recommends using Template Records to allow consistent Employee Creation. See Adding an Employee: Best Practices for more information.
- The image shows three records checked. It is possible that records are checked by default when this dialog displays. See the adding records chart for an explanation of the default behavior.

Property-Level Security

Employee Roles provide an option, **[Enable Property-Level Security]**. This option, found on the View Tab of the Employee Role module, limits EMC users to viewing only the Properties where they contain a Property Employee Record. The functionality of this option is as follows:

- If any Role assigned to an Employee has this option enabled, Property-Level Security is considered "enabled" for that Employee.
- If Property-Level Security is enabled for the logged-in Employee, the user will only be able to view Properties where he has a Property Employee Record.

Best Practices

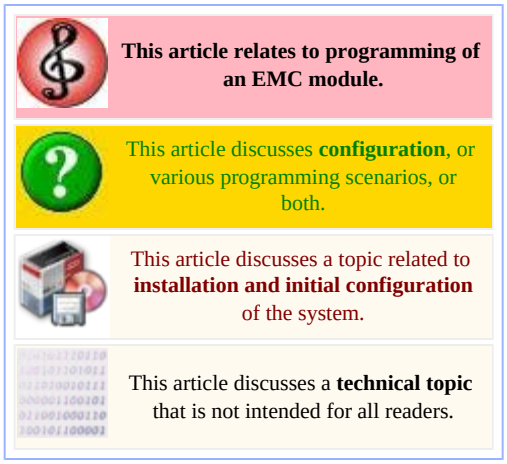
The average EMC user should be associated with a Role where this option is enabled; this bit should not be enabled for Administrator-type EMC users. (Often, a specific Role called "Property-Level Security" is created, and only this option is enabled. This Role is then assigned to the "average EMC user" as appropriate.)

See also

Employees	Employee · Adding an Employee · Adding an Employee 2x · Employee Class · Employee Group · Employee Level · Employee Maintenance · Employee Meal · Employee Permissions Report · Employee (PMC Procedure) · Employee Role · Enterprise Role · Role (Simphony 2.0) · Operator · **Property Employee Record**
Learning series: Employees	

Property Level CAL Server

This article is geared toward Simphony system experts with a good working knowledge of the application's configuration and functionality.



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- 1 Property Level CAL Server Overview
  - 1.1 General Design Overview
    - 1.1.1 SimphonyCALHandler
    - 1.1.2 Ops
    - 1.1.3 Application Changes for Ops
  - 1.2 PMC Diagnostics
  - 1.3 EMC Configuration
- 2 See also

Property Level CAL Server Overview

When client executables and support files are out of date, the Client Application Loader (CAL) process sends a new set of files from an Enterprise server. In the case where there are many Workstations, this can cause a severe bandwidth problem. To alleviate this bottleneck, one or more Service Hosts will be configured at the Property level. The updated files will first be loaded onto these machines at the property, and workstations will retrieve the updated files from these 'CAL Servers'. The CAL Servers can run either Win32 or Win CE. Under WinCE, the Web Server application requires Win CE version 6 or higher.

General Design Overview

SimphonyCALHandler

The SimphonyCALHandler is the EGateway handler which processes file update requests from clients. In the Simphony v1.x design previous to this enhancement, this web service was only utilized at the Enterprise level. The workstation’s CAL client may now point to the EGateway URL of a Property level CAL Server.

The SimphonyCALHandler will be expanded to be sure the files on Property level CAL servers are up to date. When the CAL handler module is initialized, it checks to see whether it is a Property level updater. If so, it spawns a new thread which monitors the Enterprise server for CAL files. In essence, this new thread is doing for the Property level Service

Host the same procedure that the CAL client does for the client. That is, the CAL Client process is called from the client to update files which are out of date compared against the Property service host, and the Property service host is checking it's files against the Enterprise server to update its out of date files in the same manner.

Ops

There's a need to ensure that Ops still goes to the Enterprise level posting server, ***not*** to the Property level CAL server. This is an issue because the client has a single registry entry for the URL, which is used both by Ops and the CAL client. To resolve this possible discrepancy, a new web service call, **MSG_CAL_GET_POSTING_URL_REQ**, has been defined. When Ops initializes, it gets its URL from the registry as before. Just in case the URL may not be the real posting server URL, it calls this new web function, using the URL it has retrieved from the registry. If there is a Property level CAL server, the function will return its Enterprise server URL. If there is not a Property level CAL server, the call will go to the Enterprise server, which will return its own URL. In either case, the correct URL has been obtained, and that URL is used by Ops.

- In the case where the client is Offline, the procedure which retrieves the URL must be delayed until an online state is reached.

Application Changes for Ops

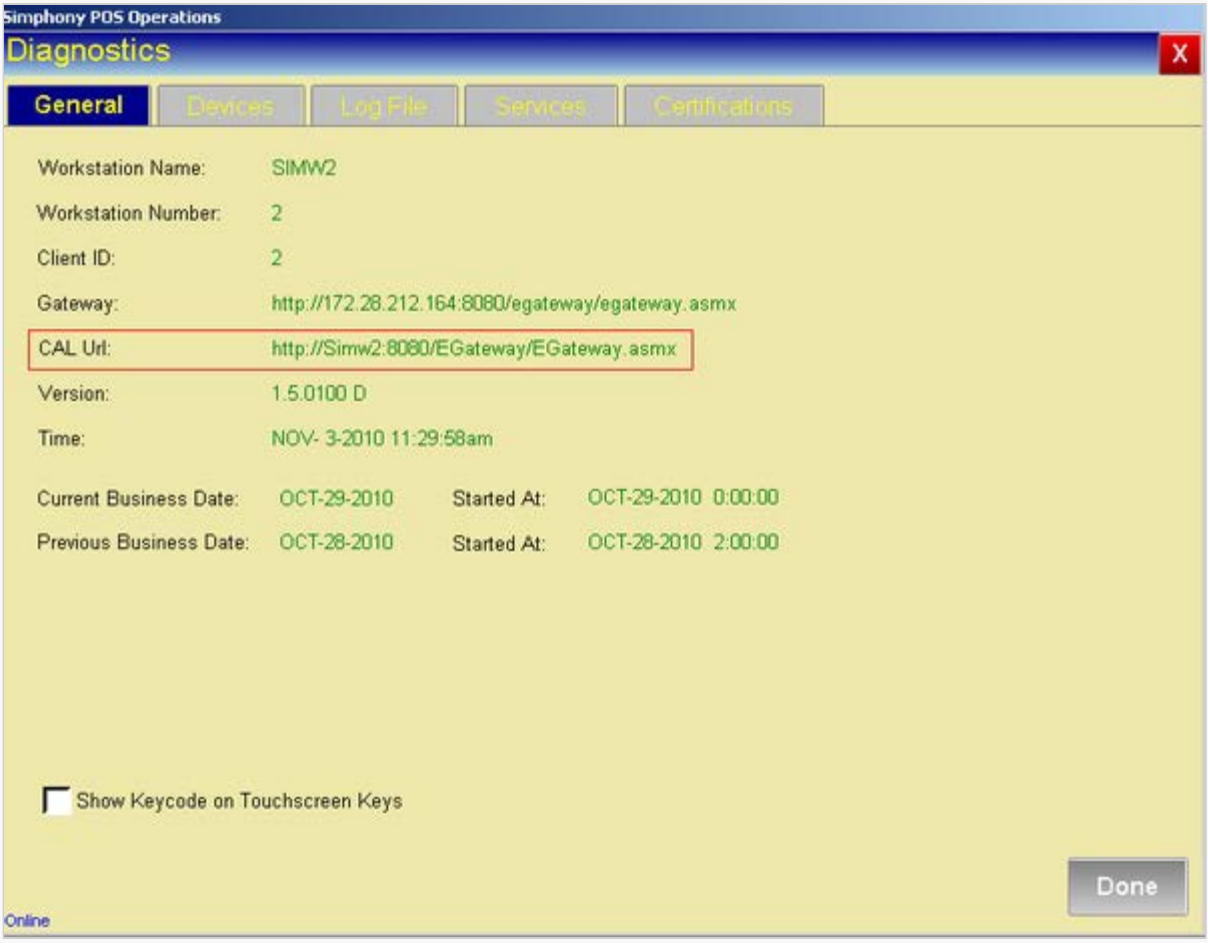
CCommState.cpp contains a function called **OneTimeInit**, which reads the gateway URL which will be used during the session. This function now includes the new web service call **GetPostingURL**. The new function starts out with the URL from the registry, as before. It sends the MSG_CAL_GET_POSTING_URL_REQ web service call using that URL, which may already be the Enterprise URL, but may also now be a Property URL. If the URL returned is different, the OneTimeInit function is called again to set up the proper system variables based on the new URL.

In the instance where the client is Offline, a certain level of complication is added since the web service call to retrieve the URL fails. Should this occur, the OneTimeInit procedure must be marked as ***not*** completed by setting the variable **mCommInitialized** to **false**. At a later time, if an Online condition is achieved, the procedure is retried and the proper URL obtained. A special case occurs when OPS is unable to communicate with the CAL server. Without any further changes, the URL in the registry would be the address of the CAL server, and the **GetPostingURL** call would fail, causing the client to go Offline. Since the Enterprise server may actually be available, this problem has been addressed by a new registry entry on the client, in **HKLM\Software\Micros\PosClient\LastUsedUrl**. Every time Ops successfully initializes in the **OneTimeInit** function, the URL is written to this registry entry. Then, on the occasion where communication fails, this entry is read, and a last attempt at initialization is made using this last used URL. This will solve the problem except for the extreme case where there is no saved last URL entry, which would only happen if the CAL server was down the very first time OPS was started. If this should occur, the client would just go Offline as in the normal case.

PMC Diagnostics

As a diagnostic tool, the PMC Diagnostics screen now includes a new line under the

General tab called the **CAL Url**, which provides the URL from the OPS client's registry. This may be different from the **Gateway** entry, which reflects the URL being used for the posting server.

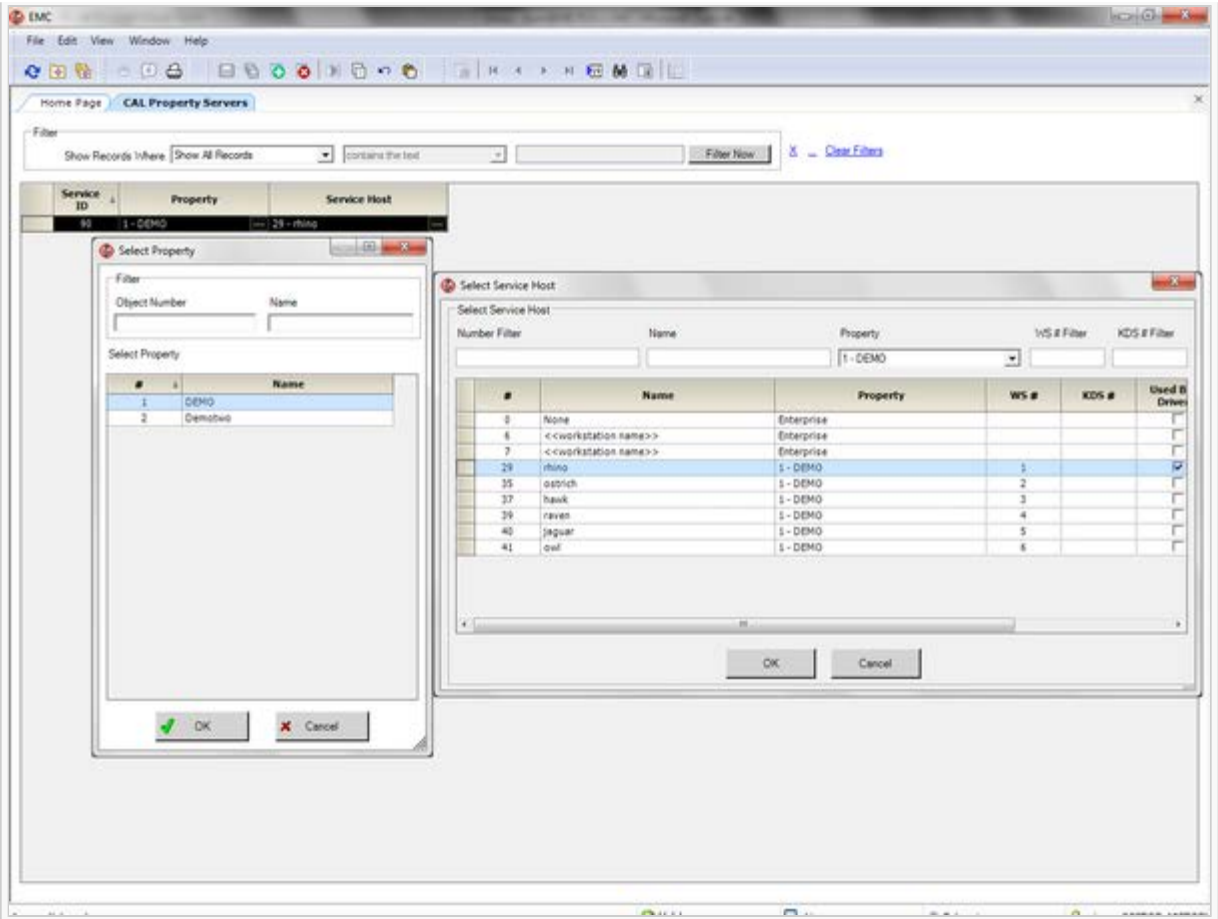


PMC Diagnostic Tool - CAL Url

EMC Configuration

1. Access the EMC and define a Workstation for the Property which will use the CAL Property updater. Be sure to fill in the Service Host fields. Alternatively, define a new Service Host and select '**Add OPS Client to this Service Host**', defining which Property the workstation belongs to. In

either case, the result will be a Service Host assigned to a workstation ID so it can be identified as belonging to a specific Property.



EMC-> Enterprise level-> Hardware header-> CAL Property Servers

2. From the EMC, go to the Enterprise level-> Hardware header-> CAL Property Servers. Choose the '**Add**' function to add a new CAL Property server. Choose the correct Property from the drop-down, and then select the Service Host from step one from the list of Service Hosts for that Property. In so doing, EMC will add an entry in the Service table in the database. The entry will include the HierStrucID for the Property, the ServiceHostID for the Service Host, and a ServiceType of 11, which is the service type for a CAL Property server. This will in turn create an entry in the ServiceHost.xml for that Service Host in the Cal Files structure on the Enterprise server. This is typically located under **\EGatewayService\CAL\ServiceHosts\xx\Files**, where **xx** is the Service Host ID for that Service Host. The entries from this file are copied to the Service Host by the CAL client, and then its configuration file is updated to indicate that it is a CAL Property server. Once CAL has had a chance to complete the update, verify that the configuration has been updated. For Win32 machines, be sure there is a new key in the Web.config called **CALPropertyServerServiceID**, and it is non-zero; it should contain the new service ID value, as in: **<add key=" CALPropertyServerServiceID " value="95" />.** Additionally, be sure that the Web.config variable **SimphonyCALDiscoveryURL**, points to the CAL Property Updater (itself) and the variable **EGatewayURL** points to the Enterprise level server. Also verify that the variables **UseDbConnection** and **UseDbForTransmissionKeys** are set to **false**. For Win CE machines, the configuration file is **\CF\Micros\WebServer\wwwroot\EGateway\Web.config.txt**. Be sure the variable **CALPropertyServerServiceID** has been updated, as above. Also, check that the **EGatewayURL** variable points to the Enterprise level server where updated CAL files reside. The registry entry **HKLM\Software\Micros\CAL\Config** should include the **WsId** (a DWORD) from number 1 above. From the EMC, this is the number in the **Workstation ID** field in the **General Settings** area under Property-> Workstations-> General tab. The **ServiceHostId** (a string) should be the Service Host ID, which is the number in the **Service Host** field in the **Service Host Configuration** area under Property-> Workstations-> Service Host. If desired, another DWORD sub-key may be added under this key called the **PropertyUpdateInterval**, and set it to the number of seconds between checks for update files (the default is 60). Verify that the network user has full privileges for the **HKLM\Software\Micros\CAL\Config** key. This user is typically called '**NETWORK SERVICE**'; for older

operating systems such as Windows XP, use the '**ASPNET**' user. The network user should also have full privileges for the **EGatewayServices\CAL** folder.

3. Be sure the web service is running from the CAL Property Updater, then for each workstation which will use this updater, reconfigure CAL (Start button-> Programs-> CAL-> Reconfigure CAL). Choose the Server Name from the list of available servers, select the Property from the Property list, and choose the workstation from the available workstation list. Repeat this operation for each workstation to be assigned to the Property updater.

See also

- Simphony 1.5 Maintenance Release 2

Property Merchant Groups

Property Merchant Groups is the EMC module where Merchant Groups are assigned to Revenue Centers and/or Properties.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 EMC Configuration
- 2 Types of Configuration
- 3 Other Consideration
- 4 See also

EMC Configuration

Merchant groups are configured on the enterprise scope of EMC. (See also, How to Configure Credit Cards.) After merchant groups are configured, they must be assigned to properties and/or Revenue Centers. This is done in the **Property Merchant Groups** module, located on the property scope of EMC, under the Property Information header.

This module does not contain a Form View. In the Table View that displays, the first row is the Property, and all other rows show the Revenue Centers in the property. (More specifically, RVCs display only if a user has permissions to view them. See Enable Revenue Center-Level Security.) Three columns display; only the "Merchant Group" column is configurable.

#	RVC / Property	Merchant Group
	Property One	1 - Visad 1
1	Restaurant Prnt	0 - Use Property Setting
2	Concessions Prnt	0 - Use Property Setting
3	HHT Parent	0 - Use Property Setting
4	Deli Parent	0 - Use Property Setting
11	Restaurant Chld	0 - Use Property Setting
12	Concessions Chld	0 - Use Property Setting
13	HHT Child	0 - Use Property Setting
14	Deli Child	0 - Use Property Setting
21	Restaurant 3	0 - Use Property Setting
22	Concessions 3	0 - Use Property Setting
23	Handhelds 3	0 - Use Property Setting
24	Deli 3	2 - Visad 2

The Property Merchant Groups module in EMC.

Types of Configuration

For most installations, only the Property has a Merchant Group assigned. When a Property has a merchant group assigned, all RVCs in that property will also use the same Merchant Group, unless programmed otherwise. In the image shown, Property One has "Visad 1" selected as its Merchant Group. All the other RVCs (except Deli 3) are configured to "0", which means that they will use the property setting.

In some situations, RVCs may need to use different Merchant Groups than the rest of the property. This is often used for leased outlets or other similar situations. In the example image, RVC #24, Deli 3, is configured to use "Visad 2" as its Merchant Group.

Other Consideration

- For Audit Trail purposes, changes in this module are treated like a single-record module (similar to RVC Parameters or Property Descriptors); all records for this module are logged without an Object Number.

See also

Credit Cards	Credit Cards · Credit Card Authorize/Finalize · Credit Card Batching, Editing, and Transferring · Credit Card Driver · Credit Card Driver Type · Credit Card Function Keys · Credit Card Merchant Group · Credit Card Operations (CA Driver) · Credit Card Operations (No CA Driver) · Credit Card Preamble · Credit Card Voucher · How to Configure Credit Cards · Loadable Credit Card Payment Driver Configuration · Prepaid Credit Card · **Property Merchant Groups** · Quick Service Transaction · RFID Credit Card Transaction
Learning series: Credit Cards	

Property Parameters

Property Parameters, sometimes shortened to **Prop Parms**, is a module in EMC. In this module, there are several option bits and fields that control various behaviors for a Property. This article summarizes the tabs that are available within the Property Parameters module.

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

Contents

- 1 General Tab
- 2 Search Tab
- 3 Options Tab
- 4 Reporting Tab
- 5 Workstations Tab
- 6 Order Types Tab
- 7 Timekeeping Tab
- 8 Calendar Tab

General Tab

- International Configuration Settings:
  - The base Currency for the property
  - Taiwan GUI Parameter settings
  - Taiwanese Serial Numbers
  - The Languages assigned to the property (up to 4)
- LDS NLU Group
- Number of Days to Save Credit Batch Files
- Configure email receipt

Search Tab

- The **Search Tab** allows a text search for option bits in Checked List Boxes from each of the other tabs. Options can be set from this tab or from the tab where the bit originates; the boxes refresh when switching from one tab to the next.

Options Tab

- Many option bits are on this tab.

Reporting Tab

- More option bits
- Property Table Count

Workstations Tab

- Database Update Frequency
- Lines Per Workstation Report Page
- Default Transaction Help Screen - Assigns the help screen that will display when the help key is pressed on the workstation.
- Install User Security Username and Password
- Service Hosts for the Property:
    - Offline Cache Service Host - Only the Service Host field is configurable; the Service Host field allows a selection of workstation service hosts only.
    - SIM Service Host - Both the Service Host and Port fields are configurable; the Service Host field can be any type of Service Host.

Order Types Tab

- A property can have up to eight Order Types. This tab allows a programmer to configure the Order Type names and to set the Order Types to active.

Timekeeping Tab

- This tab includes several fields relating to timekeeping. See also: Time Clock Schedule, Grace Periods, Breaks, and Start of Payroll

Calendar Tab

- This tab is used to configure Start of Day settings.

Quantity Threshold Discount

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Understanding quantity threshold discounts
- 2 Configuring quantity threshold discounts
  - 2.1 Configuring discount interaction (exclusivity)
- 3 Using quantity threshold discounts
  - 3.1 When the trigger and award groups are the same
    - 3.1.1 Buy One, Get One
    - 3.1.2 Buy Two, Get One
- 4 See also

Understanding quantity threshold discounts

A quantity threshold discount is a type of automatic discount or automatic coupon discount that reduces the price of one or more items based on other items that have been ordered. This type of discount is used for Buy-One-Get-One scenarios, such as *Buy one DVD and get one CD for 50% off*, or *Buy three shirts and get up to two ties for free*.

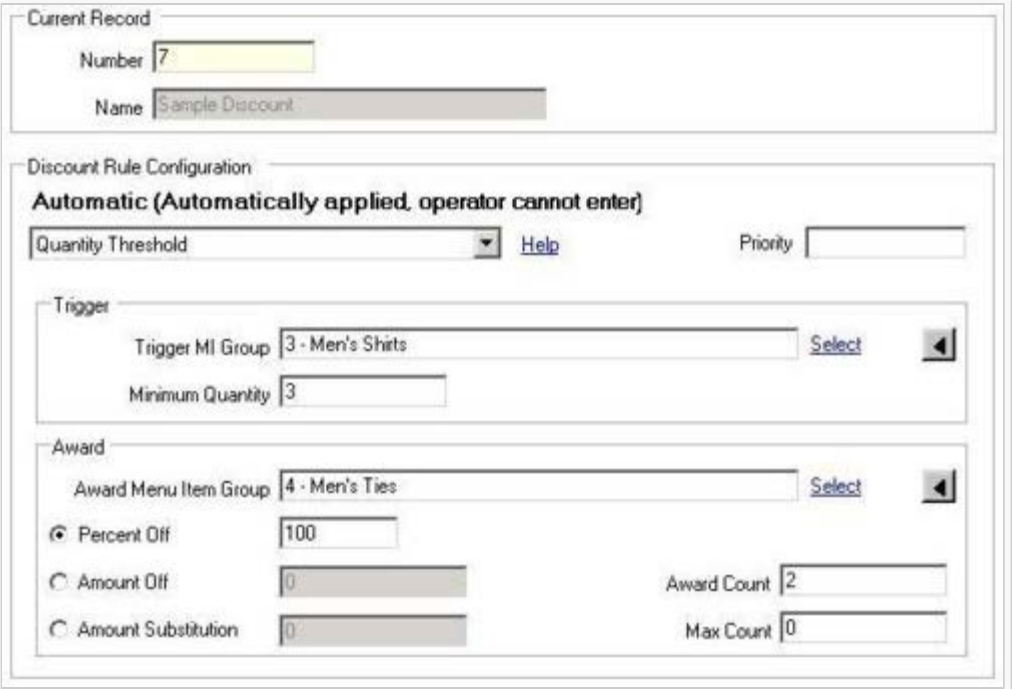
Configuring quantity threshold discounts

1. Navigate to *EMC* > *Enterprise / Property / Zone* > *Configuration* > *Discounts* > *Auto*.
2. Select **[2 - Quantity Threshold]** from the drop-down list.
3. Enter information in the following fields:

Field	Description
Priority	This field determines the order in which discounts are calculated. This field is blank (0) for all discounts by default, meaning that discounts are calculated at the same time. When using this field, the workstation calculates all discounts in priority 1, then in priority 2, and so on. Priority 0 discounts are calculated last. The Priority field allows the discount engine to determine which discount to apply quicker, thus reducing CPU time on the workstation.
Awarding Algorithm	Select either **1 - Best Deal for Customer** or **2 - Best Deal for Merchant**. This value is set to Best Deal for Customer by default, which means that the best possible deal (highest discount amount) will be applied to the check. When this value is set to Best Deal for Merchant, the automatic discount calculates so that the smallest discount amount is given to the customer. This option is intended for sites with specific needs and configurations. MICROS recommends using the Best Deal for Customer setting unless

	your site requires specific business needs.
Use Price in MI Group Detail	Select this option to use the promotion price that appears in the Menu Item Groups module for the discounted menu item. When you select this option, the textboxes next to Percent Off, Amount Off, and Amount Substitution are dimmed even after their respective radio buttons are selected.
Trigger MI Group*	Select the menu item group to trigger the discount award. When the minimum quantity of items from this menu item group is ordered, items from the award menu item group are discounted based on the award configuration for this discount. For example, set this field to "DVDs" group if this is a Buy-One-Get-One scenario, such as *Buy one DVD and get one CD for 50% off*.
Minimum Quantity	Enter the number of items that must be ordered from the trigger menu item group before the discount award applies to the check. For example, to configure a scenario where every three shirts purchased awards two free ties, set this value to 3, the Trigger MI Group as the Shirt group, the Award Menu Item Group as the Tie group, and the Award Count to 2. If this field is set to 0, it is the same as setting it to 1.
Award Menu Item Group*	Select the menu item group to be used as the award group. When the minimum quantity of items from the Trigger MI Group is ordered, items from this Award Menu Item Group are discounted based on the award configuration for this discount. For example, set this field to "CDs" and the Percent Off field to 50 if this is a Buy-One-Get-One scenario, such as *Buy one DVD and get one CD for 50% off*.
Percent Off	Select this option to enter the percent discount that will apply to each item in the award menu item group. This option is used for discounts such as *Buy one DVD, get 50% off any CD*.
Amount Off	Select this option to enter the amount discount that will apply to each item in the award menu item group. This option is used for discounts such as *Buy one DVD, get $3.00 off any CD*.
Amount Substitution	Select this option to enter the price that will be charged for each item in the award menu item group. This option is used for discounts such as *Buy one DVD get any CD for $8.00*.
Award Count	Enter the number of award items that are allowed after the Trigger MI Group's minimum quantity is reached. For example, if this is a *Buy Three Shirts and get up to two ties at 100% off* discount, set this field to 2.
Max Count	Enter the maximum number of awards that can apply to a single check. One award is represented by the Award Count field. Therefore, if the award count is 2 and this field is set to 1, only one award (which happens to be two items) can be applied to the check. This field can be used to prevent too many discounts from applying on the same check. In many automatic configurations, this value is set to 1, but many coupon configurations may allow a different value based on the number of coupons allowed per transaction. If this field is set to 0, the maximum count is unlimited.

*When using quantity threshold discounts, you can configure the Trigger MI Group and the Award Menu Item Group as the same or different menu item groups. In the following example, "Men's Shirts" is the Trigger MI Group with a minimum quantity of 3. The Award Menu Item Group is configured as "Men's Ties", set for a 100% discount when two are ordered. When three shirts are on a check, up to two ties are discounted 100%.



The Auto tab configured for quantity threshold discounts.

Configuring discount interaction (exclusivity)

For information about configuring a discount to interact with other discounts, see Discount Exclusivity.

Using quantity threshold discounts

By default, the customer gets the best deal when the system performs the discount calculation. The first example shows the discount amount after ordering two ties. Both ties are discounted at 100% for a total $22.00 discount. While not shown in the sample order receipts, when a transaction includes three shirts and only one tie, the tie is discounted 100%. The Award Count is the maximum number of items that can be discounted per trigger item.

```
-- Example 1: Two ties --
  Shirt           25.00
  Shirt           25.00
  Shirt           25.00
  Tie             12.00
  Tie             10.00
  Discount       -22.00
```

If the operator then adds another tie for $15.00, the discount recalculates to include the best deal for the customer (Example 2). Because the best deal is to discount the $12.00 and $15.00 ties, the new discount is $27.00. The $10.00 tie is no longer discounted because the Award Count is configured for two ties.

```
-- Example 2: Three ties --
  Shirt           25.00
  Shirt           25.00
  Shirt           25.00
  Tie             12.00
  Tie             10.00
  Tie             15.00
  Discount       -27.00
```

In addition to the Best Deal for Customer, you can configure quantity threshold discounts to calculate the Best Deal for Merchant. This configuration type is not discussed here. For more information, see Best deal for merchant.

Quantity threshold discounts appear on customer receipts based on the configuration of the Item Discount option.

When the trigger and award groups are the same

When the Trigger MI Group and the Award Menu Item Group are the same, the system still provides the best deal discount. However, the behavior may appear different to the operator.

Buy One, Get One

Consider the following configuration for a Buy One, Get One:

- Trigger MI Group: All Food Items
- Minimum Quantity: 1
- Award Menu Item Group: All Food Items
- Award: 50% off.
- Award Count: 1

```
-- Example 3: Two apps --
  Chicken Wings  10.00
  Cheese Sticks   8.00
  Discount       -4.00
```

When two food items appear on the check, the *trigger* item is the more expensive item, while the *award* item is the less expensive item. This behavior is intentional — in general, a discount promotion is something like this: *Buy one appetizer, get one appetizer of equal or lesser value for 50% off.* (See example 3.) This behavior ensures that when both a $500.00 item and a $1.00 item appear on a check, the $1.00 item is discounted, not the other way around.

Now consider what happens to Example 3 after a third item is ordered. Ops looks at all three items, determines which one is the most expensive (and thus the trigger), and then applies the best deal of the other items:

Example 4a
: The trigger item is Chicken Wings and the discounted item is Cheese Sticks. The discount is $4.00. The Celery Sticks item is not discounted.

Example 4b
: The trigger item is Chicken Wings and the discounted item is Spinach Dip. The discount is $4.50. The Cheese Sticks item is not discounted.

Example 4c
: The trigger item is Crab Dip and the discounted item is Chicken Wings. The discount is $5.00. The Cheese Sticks item is not discounted.

```
-- Ex 4a: Third item cheapest --
  Chicken Wings  10.00
  Cheese Sticks   8.00
  Celery Sticks   5.00
  Discount       -4.00
```

```
-- Ex 4b: Third item middle --
  Chicken Wings  10.00
  Cheese Sticks   8.00
  Spinach Dip     9.00
  Discount       -4.50
```

```
-- Ex 4c: Third item most expensive
--
  Chicken Wings  10.00
  Cheese Sticks   8.00
  Crab Dip       12.00
  Discount       -5.00
```

Finally, if four items in the Food group are ordered on the same check, the discount works like this:

- The highest priced item is a trigger item, discounting the second highest item.
- The third highest item is a trigger item, discounting the cheapest item.

Buy Two, Get One

Consider the following configuration for a Buy Two, Get One:

- Trigger MI Group: All Food Items
- Minimum Quantity: 2
- Award Menu Item Group: All Food Items
- Award: 50% off.

```
-- Example 5: Three apps --
   Chicken Wings  10.00
   Spinach Dip     9.00
   Cheese Sticks   8.00
   Discount       -4.00
```

- Award Count: 1

When three food items appear on the check, the *trigger* items are the most expensive items, while the *award* item is the least expensive item. This behavior is intentional — in general, a discount promotion is something like this: *Buy two appetizers, get one appetizer of equal or lesser value for 50% off.* (See example 5.) This behavior ensures that when a $500.00 item, a $30.00 and a $1.00 item appear on a check, the $1.00 item is discounted.

Now consider what happens to Example 5 after a fourth item is ordered. Ops looks at all four items, determines which two are the most expensive (and thus the triggers), and then applies the best deal of the other items:

```
-- Ex 6a: Fourth item cheapest --
  Chicken Wings  10.00
  Spinach Dip     9.00
  Cheese Sticks   8.00
  Celery Sticks   5.00
  Discount       -4.00
```

```
-- Ex 6b: Fourth item middle --
  Chicken Wings  10.00
  Spinach Dip     9.00
  Cheese Sticks   8.00
  Nachos Grande   9.50
  Discount       -4.50
```

```
-- Ex 6c: Fourth item most expensive
 --
  Chicken Wings  10.00
  Spinach Dip     9.00
  Cheese Sticks   8.00
  Crab Dip       12.00
  Discount       -4.50
```

Example 6a
: The trigger items are Chicken Wings and Spinach Dip and the discounted item is Cheese Sticks. The discount is $4.00. The Celery Sticks item is not discounted.

Example 6b
: The trigger items are Chicken Wings and Nachos Grande and the discounted item is Spinach Dip. The discount is $4.50. The Cheese Sticks item is not discounted.

Example 6c
: The trigger items are Crab Dip and Chicken Wings and the discounted item is Spinach Dip. The discount is $4.50. The Cheese Sticks item is not discounted.

Finally, if six items in the Food group are ordered on the same check, two discounts appear on the check:

- The two highest priced items are triggers.
- The third highest item is discounted.
- The fourth/fifth items are triggers.
- The lowest priced item is discounted.

See also

Discounts	Discount · Manual Discount · Automatic Discount · Automatic Coupon Discount · Automatic Discounts for Decimal Quantity Menu Items · Combination Pricing Discount · Item Price Substitution Discount · **Quantity Threshold Discount** · Sales Price Discount · Total Price Threshold Discount · Discount Engine · Discount Exclusivity · Discount NLU · Menu Item Group · Revenue Center Group
Learning series: Discounts	

Refills

This article discusses the usage and configuration of the Refill feature.

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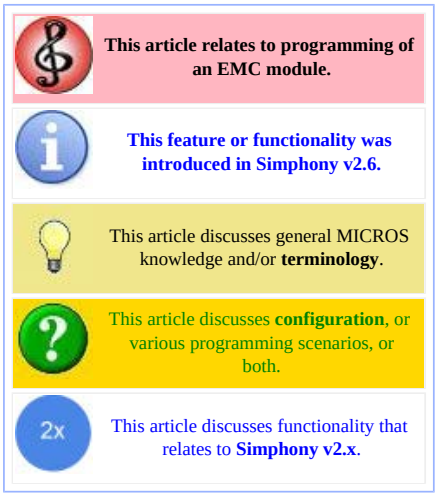
- 1 Overview
  - 1.1 EMC Configuration
  - 1.2 Privileges
    - 1.2.1 Roles
  - 1.3 Menu Item Classes
  - 1.4 Refill Descriptor
  - 1.5 Page Design
- 2 Usage
  - 2.1 Performing a Refill
  - 2.2 Menu Items with Priced and Non-Priced Condiments
  - 2.3 Refill Quantity
  - 2.4 Return and Void of Refillable Items
- 3 See also



Overview

A Refill is a function that provides Operators the ability to copy Menu Items from the Previous round of a check to the Current round, free of charge. This is ideal for special occasions such as an “all-you-can-eat” buffet where customers are able to reorder Menu Items for free until the Refill limit of the Menu Item is reached. Once the maximum Refill threshold is reached, the customer will be charged for all future orders of the Menu Item during the transaction. Menu Item Refills can **only** be performed in the Next round – after a check is Service Totaled and only once per round.

EMC Configuration

In order for the Refills feature to be configured and later used on an Operational level, EMC users and Operators must be assigned the privileges to do so.

Privileges

Roles

*Navigation: EMC-> Enterprise level-> Configuration tab-> Personnel-> **Roles***

186 - Perform Menu Item Refills

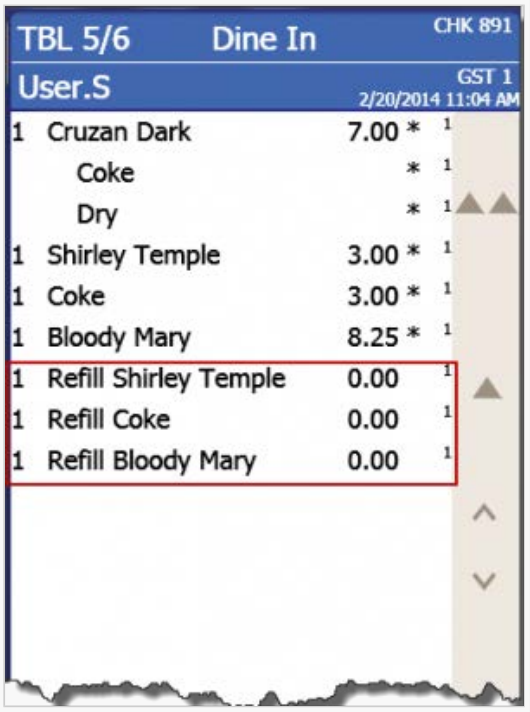
Enable this option to grant Employees associated with this Role the ability to perform Menu Items Refills.

Menu Item Classes

*Navigation: EMC-> <Enterprise / Property / Revenue Center>-> Configuration tab-> Menu Items-> **Menu Item Classes***

72 – Enable Refill

Enable this option to make the Menu Items belonging to this class Refillable.



Menu Item Refill Indicator.

Maximum Refill Count

This field defines the maximum number of Refills that a customer may order. Once this limit is reached, the customer is charged for all future orders of the Menu Item. The Maximum Refill Count that may be entered is 99. If the Maximum Refill Count is set to '0', the Refill limit is unlimited.

Refill Descriptor

*Navigation: EMC-> <Enterprise / Property / Revenue Center>-> Configuration tab-> Menu Items-> Menu Item Classes-> **Refill Descriptor***

This field defines the descriptor that can be applied to identify Refilled Menu Items on the Check Detail Area. A maximum of 12 characters may be entered.

Page Design

*Navigation: EMC -> <Enterprise / Property / Revenue Center>-> Configuration tab-> User Interface-> Content-> **Page Design***

In order for Operators to be able to initiate Refills for customers, touchscreen buttons must be configured for the desired Refill function. There are two types of Refill functions. They are:

Refill Auto

Initiates Menu Item Refills. Displays a list of Refillable Menu Items including Condiments.

Refill Interactive

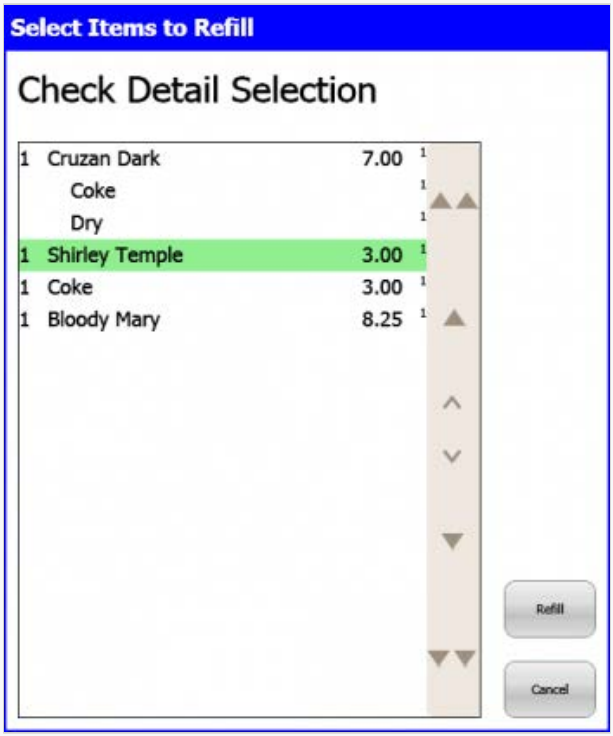
Initiates Menu Item Refills. Displays a list of **Refillable Parent Menu Items** and allows the Operator to select Required and Allowed Condiments. Only one Menu Item may be Refilled at a time using this function.

Usage

Performing a Refill

To perform a Refill, pick up the check from the Previous round from the Open Check SLU and press the **[Auto Refill]** or **[Interactive Refill]** function key. The **Select Items to Refill** window will display a list of Refillable Menu Items available on the Check.

The Operator may select a single Menu Item, or multiple Items from the list and press the **Refill** button. Selecting a Menu Item from the **Check Detail Area** and pressing either the **[Auto Refill]** or **[Interactive Refill]** function key will copy the highlighted Menu Item(s) to the check without displaying the **Select Items to Refill** window, if the selected Menu Item(s) is allowed to be Refilled. If the selected Menu Item is ***not*** Refillable, the **Select Items to Refill** window will only display the list of Refillable Menu Items.



Select Items to Refill dialog.

Menu Items with Priced and Non-Priced Condiments

When a Menu Item with a priced Condiment is Refilled, the priced Condiment will retain its cost. The price of the Condiment will be displayed in the **Check Detail Area** while the price of the Parent Menu Item will display a zero amount. However, non-priced Condiments for a Menu Item will display a zero price amount in the **Check Detail Area**.

Menu Items with priced condiments.

Refill Quantity

Operators may specify the number of Refills ***only*** if a Menu Item quantity was entered for a Refillable Menu Item when the check was first rung up. For example, a party of four orders 4 glasses of Orange Juice. In the Next round, they ask for 2 Refills. The Operator picks up the check, selects the Menu Item and initiates the Refill. The **Enter Quantity to Refill** window will be displayed for the Operator to enter the number of Refills.

The initial Menu Item quantity that was entered will be taken as the maximum quantity (in the example above, the maximum quantity is 4 when refilling the Menu Item.

The Refill of multiple Menu Items with quantities can also be performed. In such an instance, the Operator will be prompted to enter the Refill quantity in the order that the Menu Items appear on the check (i.e., the first entered number of Refills will be taken as the Refill quantity of the first Menu Item while the second entered number of Refills will be taken as the Refill quantity of the second Menu Item).

The Refill quantity dialog.

If the quantity entered exceeds the original value, a message will be displayed.

A message is displayed if the Refill quantity exceeds the original value.

Return and Void of Refillable Items

Some considerations must be taken into account when Operators attempt to perform Returns and Voids on Refill orders. They are:

- Parent Menu Items ***cannot*** be returned if it has one or more Refills.
- Parent Menu Items with one or more Refills ***can*** be Voided. However, all Refills of the Menu Item must first be Voided in reverse chronological order (the most recent Refilled item must be Voided first) in order to Void the Parent Menu Item.

Rental Deposits

This article discusses the usage and configuration of the Rental Deposits feature.

Contents

- 1 Overview
  - 1.1 EMC Configuration
    - 1.1.1 Menu Item Classes
    - 1.1.2 Service Charges
    - 1.1.3 Deposit Forfeit Return Item
    - 1.1.4 Page Design
      - 1.1.4.1 To locate the new functions in EMC
  - 1.2 Deposit Restrictions
- 2 Usage
  - 2.1 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit
  - 2.2 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Edit Deposit
  - 2.3 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Show Deposits
  - 2.4 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Deposit Number
  - 2.5 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by First Name/Last Name
  - 2.6 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Check Number
  - 2.7 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Phone Number
  - 2.8 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Custom Start and Custom End Date
  - 2.9 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Description
  - 2.10 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Full Refund
  - 2.11 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Print Deposit Report
  - 2.12 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Partial Refund
  - 2.13 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Percentage Refund
  - 2.14 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Posting | New Check is Added to Database after Refund
  - 2.15 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Print All Deposits
  - 2.16 To configure Deposits in EMC with a Menu Item or a Service

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony v2.6.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses functionality that relates to **Simphony v2.x**.

Charge using Deposits | Add menu Item after Deposit is Applied with Different Sorting Methods
- 2.17 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Applying Multiple Deposits to a Check
- 2.18 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit to a Regular Menu Item
- 2.19 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits for Rental | Void Deposit
- 2.20 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Refund to a Credit Card
- 2.21 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Refund a Check from a Different Workstation (the same Revenue Center (RVC))
- 2.22 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Cancel Transaction after Refund is Applied
- 2.23 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Change Deposit Amount
- 2.24 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Show Deposit | Search when Offline to CAPS
- 2.25 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Refund | Forfeited
- 2.26 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | How to Configure Deposits as a Service Charge
- 2.27 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Open a Check with a Deposit from a Different Revenue Center (RVC)
- 2.28 To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Void Deposit Information in a 2nd Round

- 3 See also

Overview

Support has been added for Rental Deposits on Ops with the addition of new options and functions in EMC.

New Options in EMC

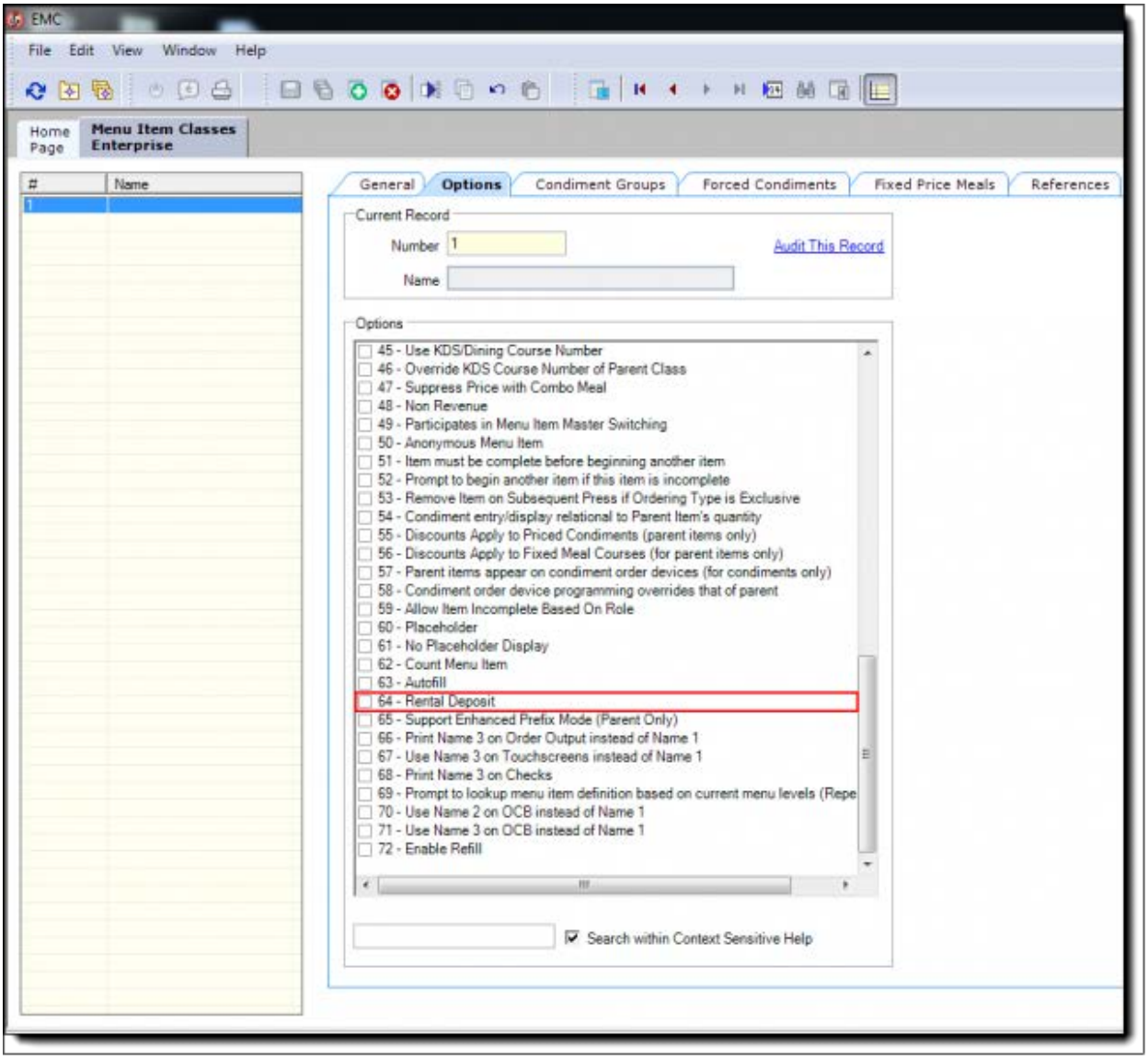
The new options are:

- Menu Item Class Option
- Service Charge Option
- Deposit Forfeit Return Item

EMC Configuration

Menu Item Classes

Access and navigate to *EMC-> Enterprise level-> Configuration-> Menu Items-> Menu Item Classes-> Options->* **[64- Rental Deposit].**



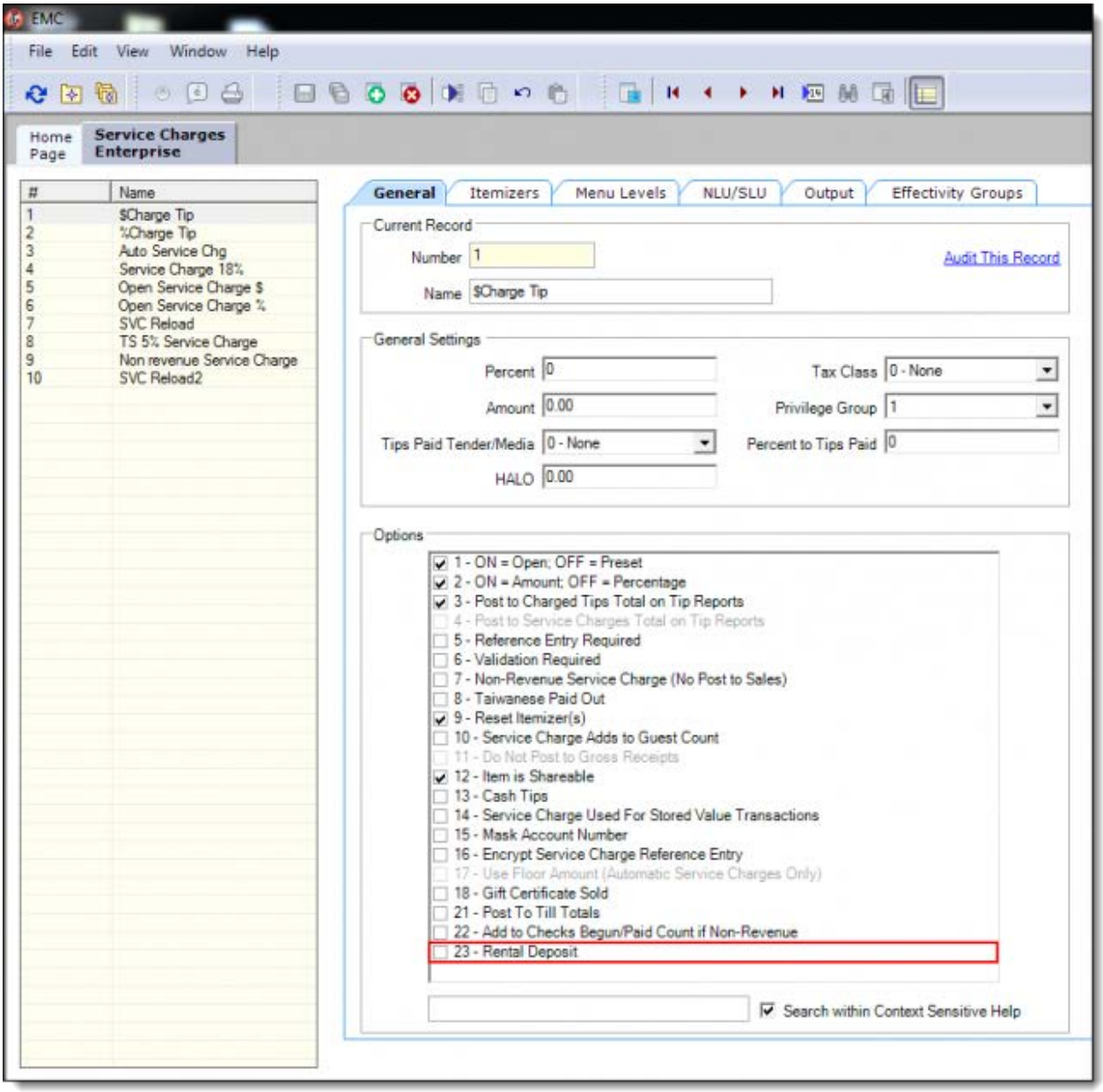
The Context Sensitive Help (CSH) text for this option reads as,

> *Enable this option to make all items in this class Rental Deposits. This option is used in conjunction with the Rental Deposits feature and is necessary to apply a deposit to a check. [Simphony v2.6].*

Service Charges

Access and navigate to *EMC-> Enterprise level -> Configuration-> Sales-> Service Charges-> General->* **[23- Rental Deposit].**

The CSH text for this option reads as,

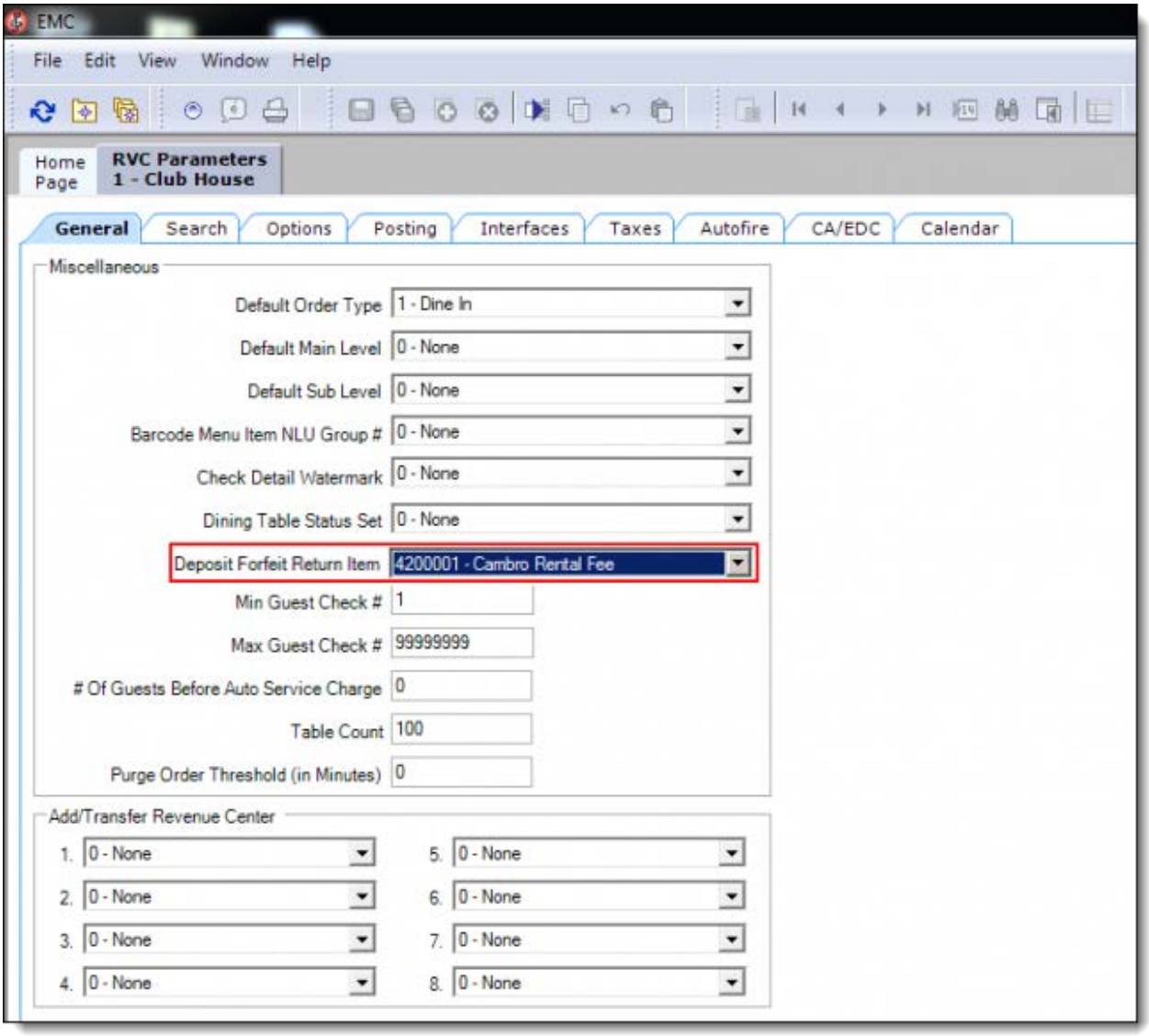


Enable this option to use this service charge as a Rental Deposit. Rental Deposits are used in conjunction with the Rental Deposits feature and are necessary to apply a deposit to a check. Service charges with this option enabled may be Non-Revenue Service charges. However, unlike traditional Non-Revenue Service Charges, a check may contain more than one Rental Deposit Service Charge. [Simphony v2.6].

Deposit Forfeit Return Item

Access and navigate to *EMC-> Revenue Center level-> Setup-> Parameters-> RVC Parameters-> General tab->* **Deposit Forfeit Return Item** *field.*

The CSH text for this option reads as,



Select the Deposit Forfeit Return Item for this Revenue Center. This setting is used in conjunction with the Rental Deposits feature and is necessary in order to refund a deposit. This item will automatically be added to a check when a rental item is returned and the deposit rental refunded. The price for this return item will automatically be set to the un-refunded amount of the deposit. [Simphony v2.6].

Page Design

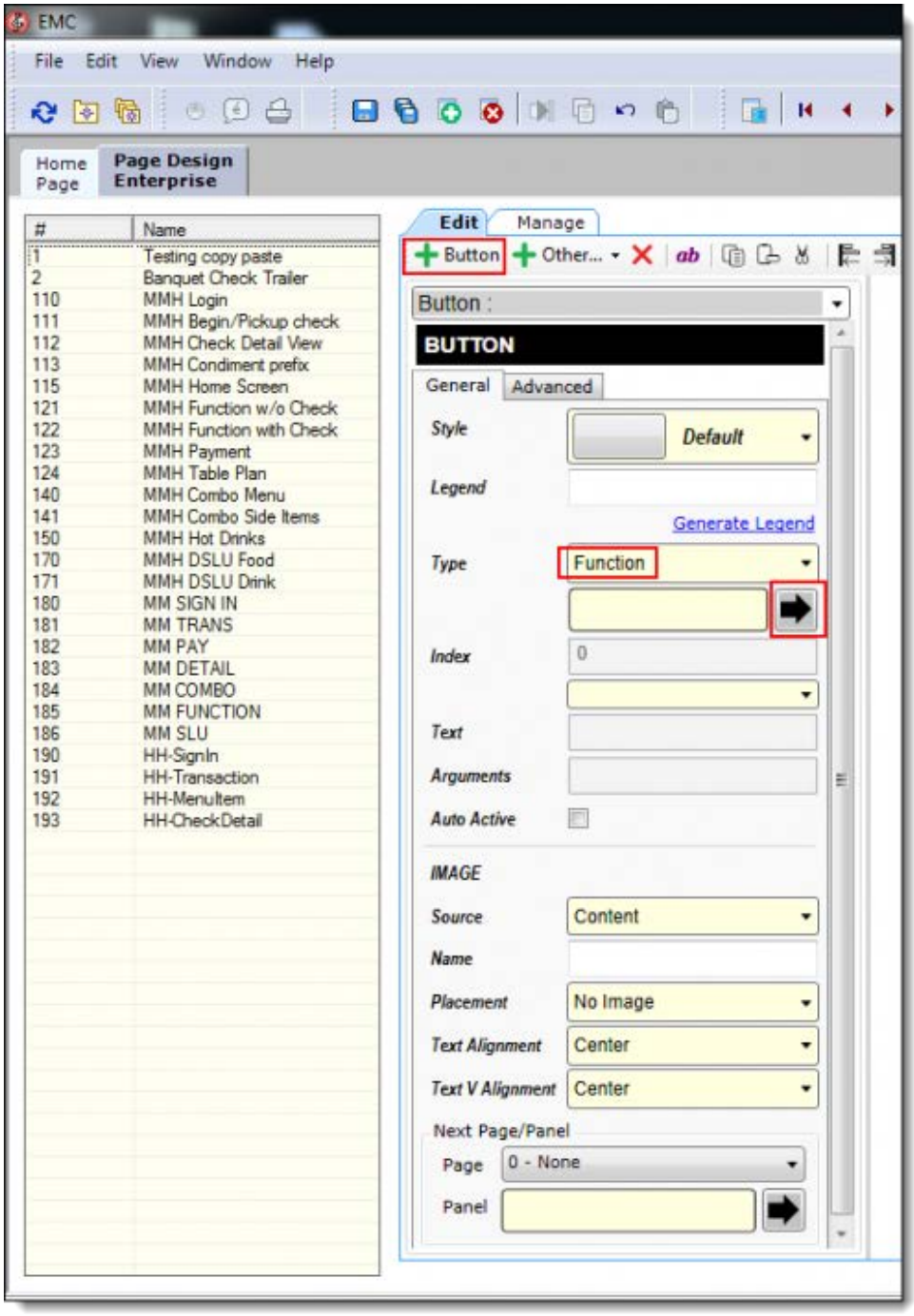
The new functions in *EMC-> Enterprise level-> Configuration-> User Interface-> Content->* ***Page Design*** are:

- Apply Deposit
- Edit Deposit
- Show Deposit

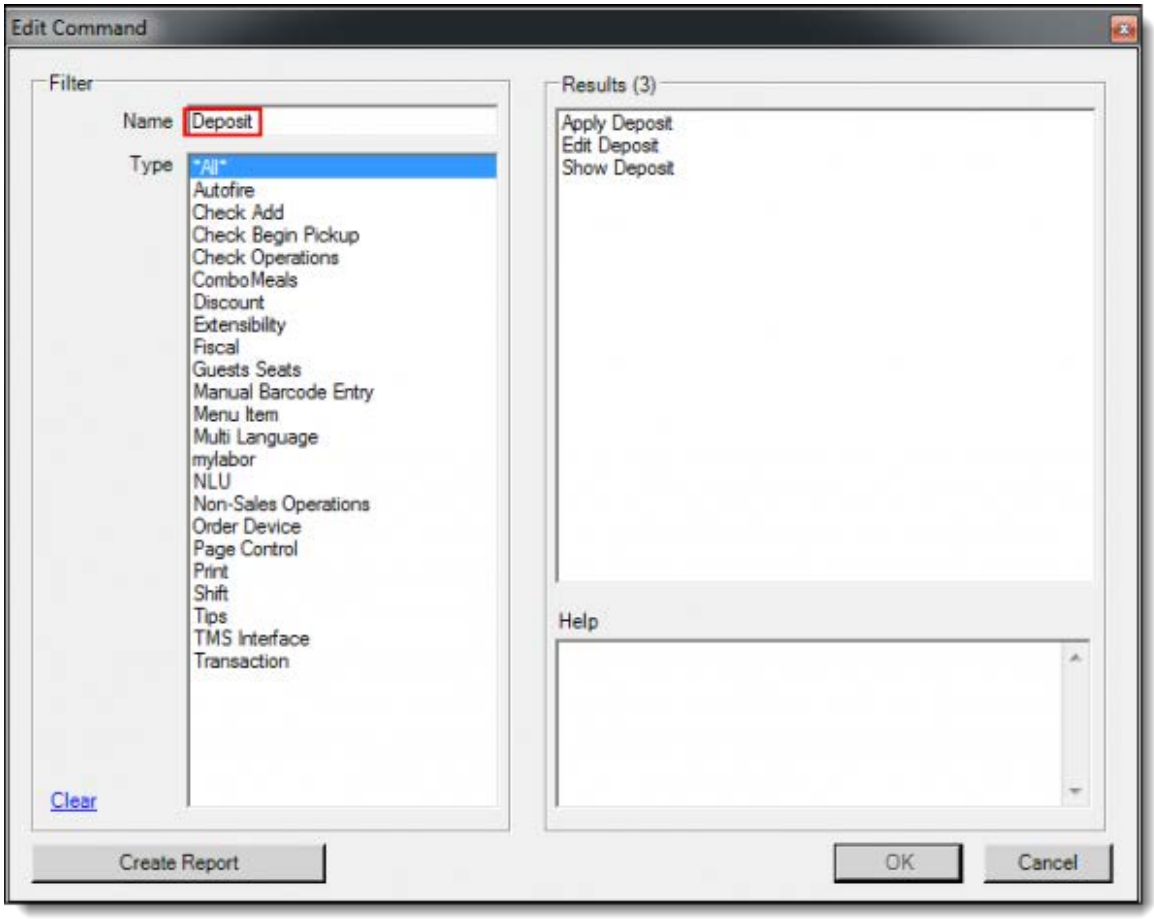
To locate the new functions in EMC

The default Type field is **Function**.

1. Click the **Arrow** to display the Edit Command screen.



2. Enter **Deposit** or **Transaction** in the Search field to locate these functions.

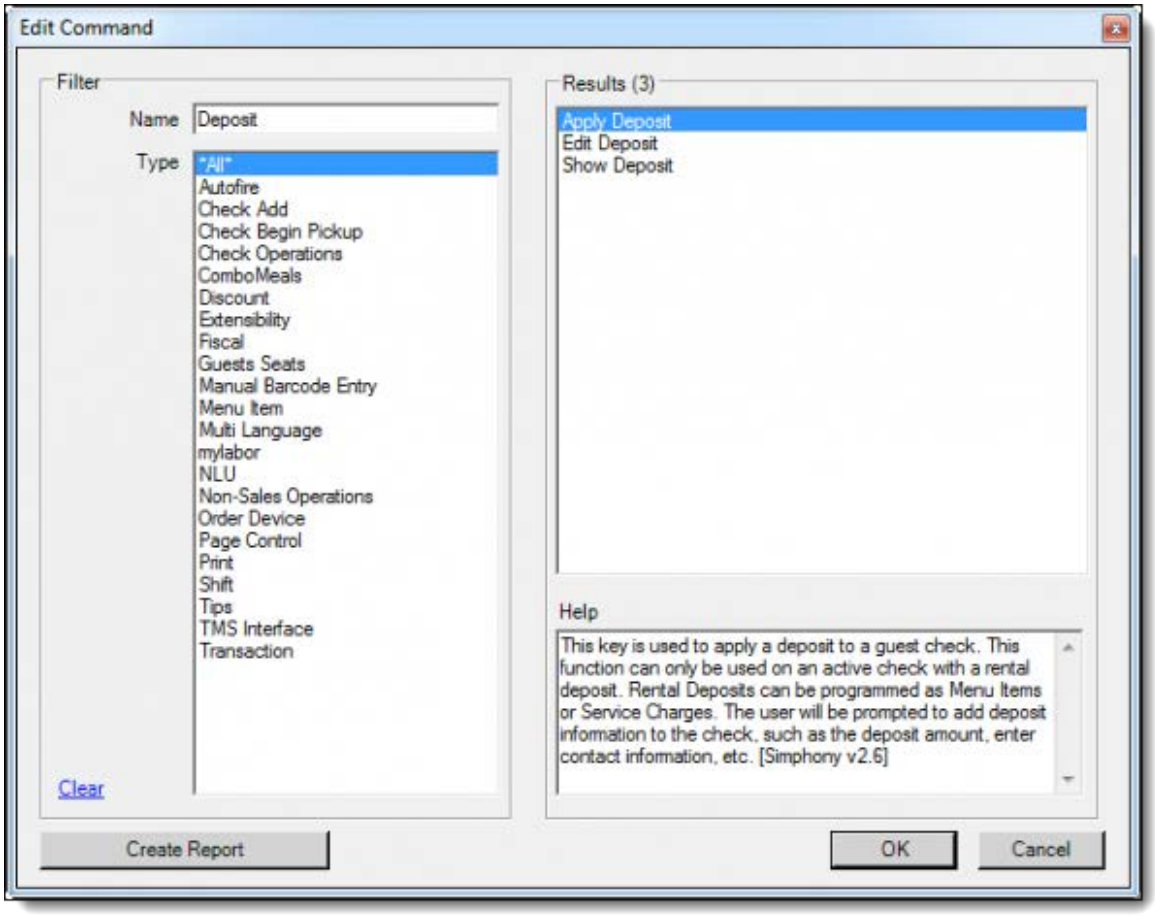


Apply Deposit

This function is used to enter Deposit information.

The Help field for this option reads as,

> *This key is used to apply a deposit to a guest check. This function can only be used on an active check with a rental deposit. Rental Deposits can be programmed as Menu Items or Service Charges. The user will be prompted to add deposit information to the check, such as the deposit amount, enter contact information, etc. [Simphony v2.6].*

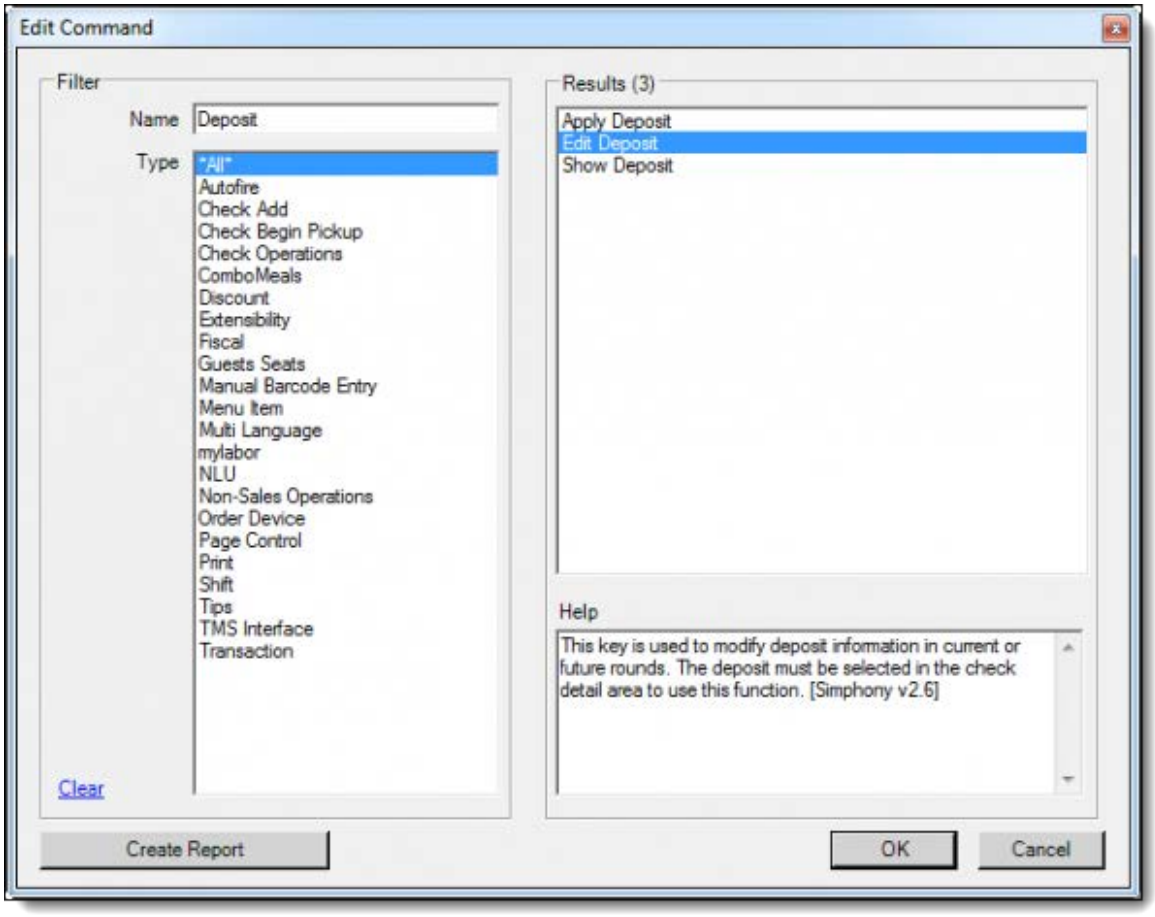


Edit Deposit

This function is used to change/correct Deposit information.

The Help field for this option reads as,

> *This key is used to modify deposit information in current or future rounds. The deposit must be selected in the check detail area to use this function. [Simphony v2.6].*

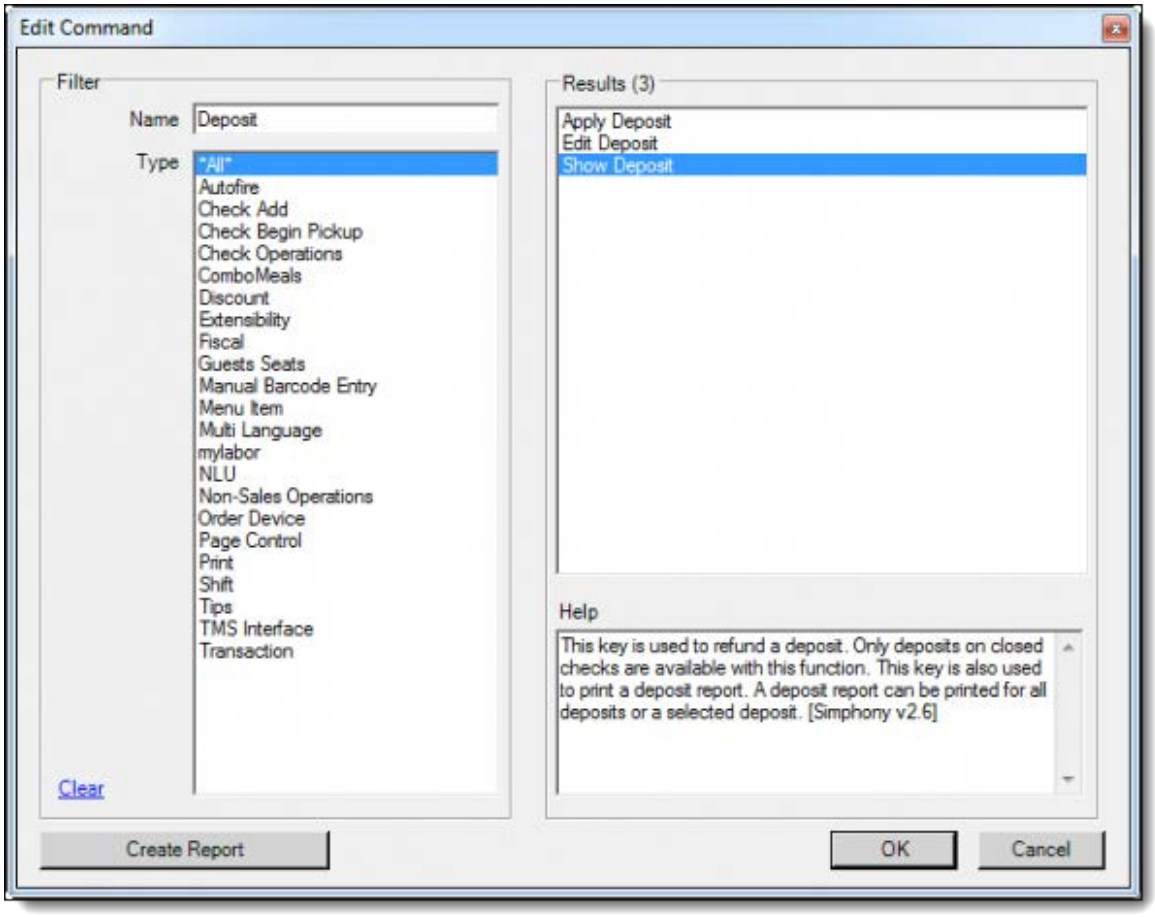


Show Deposit

This function is used to either print a Deposit or to refund a Deposit.

The Help field for this option reads as,

> *This key is used to refund a deposit. Only deposits on closed checks are available with this function. This key is also used to print a deposit report. A deposit report can be printed for all deposits or a selected deposit. [Simphonyv2.6].*

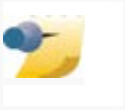


The default Type field is a **Function**. Click the arrow button to display the **Edit Command** screen. Enter either **Deposit** or **Transaction** in the Search field to locate these functions.

Deposit Restrictions

- Deposits may ***only*** be refunded in the Revenue Center from which items were rented.

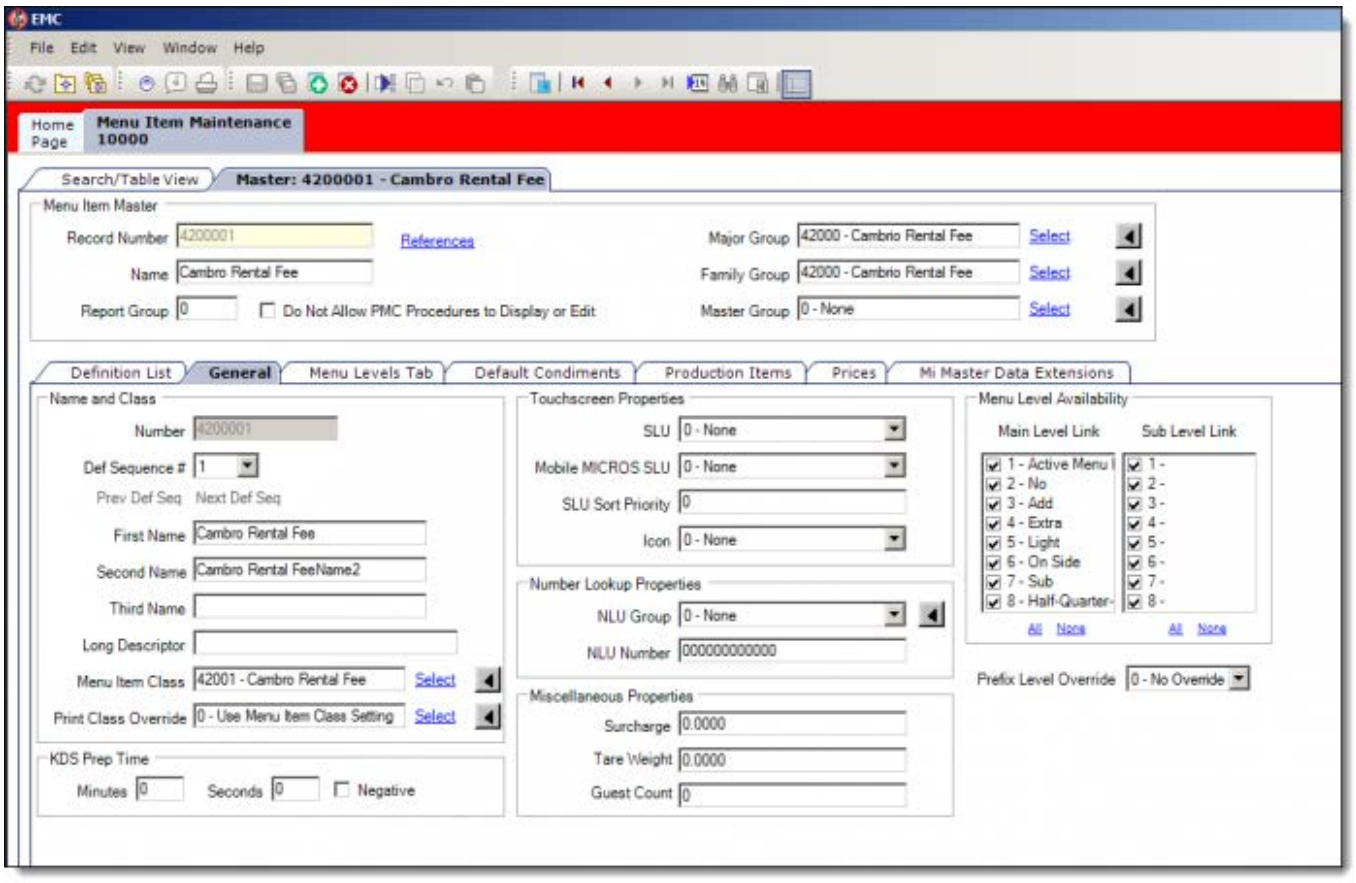
- The Check and Posting Service (CAPS) ***must*** be online as this is where the Deposit and the check containing the Deposit can be located.
- If a Rental Item is discounted, the discounted price is used for the Deposit Amount.
- Once a Deposit has been added to a check, neither Rental Items nor their discounts can be Voided.
- Automatic Discounts will not be applied to Rental Items as the discount amount may change as other items are added to the check.
- If the closed check containing the Deposit is on an Offline Workstation, the Deposit ***cannot*** be refunded due to the inability to locate and update the closed check.



- Deposits can be Voided.
- A Rental Item may be a Non-Revenue Service Charge. Unlike traditional Non-Revenue Service Charges, a check may contain more than one of these items.

Usage

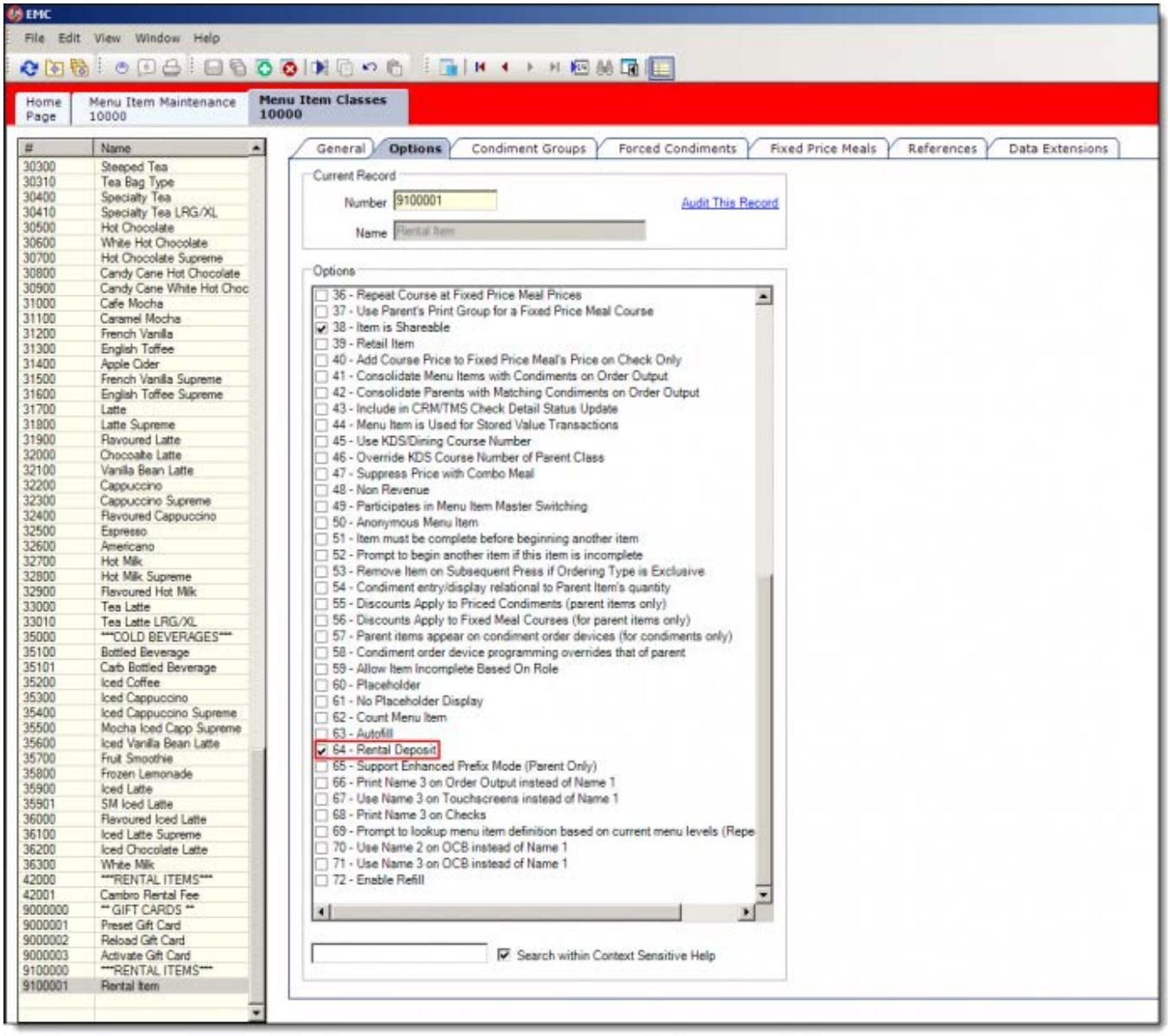
1. Add a new **Menu Item Class** for a



Deposit Rental in the **Menu Item Maintenance** module.

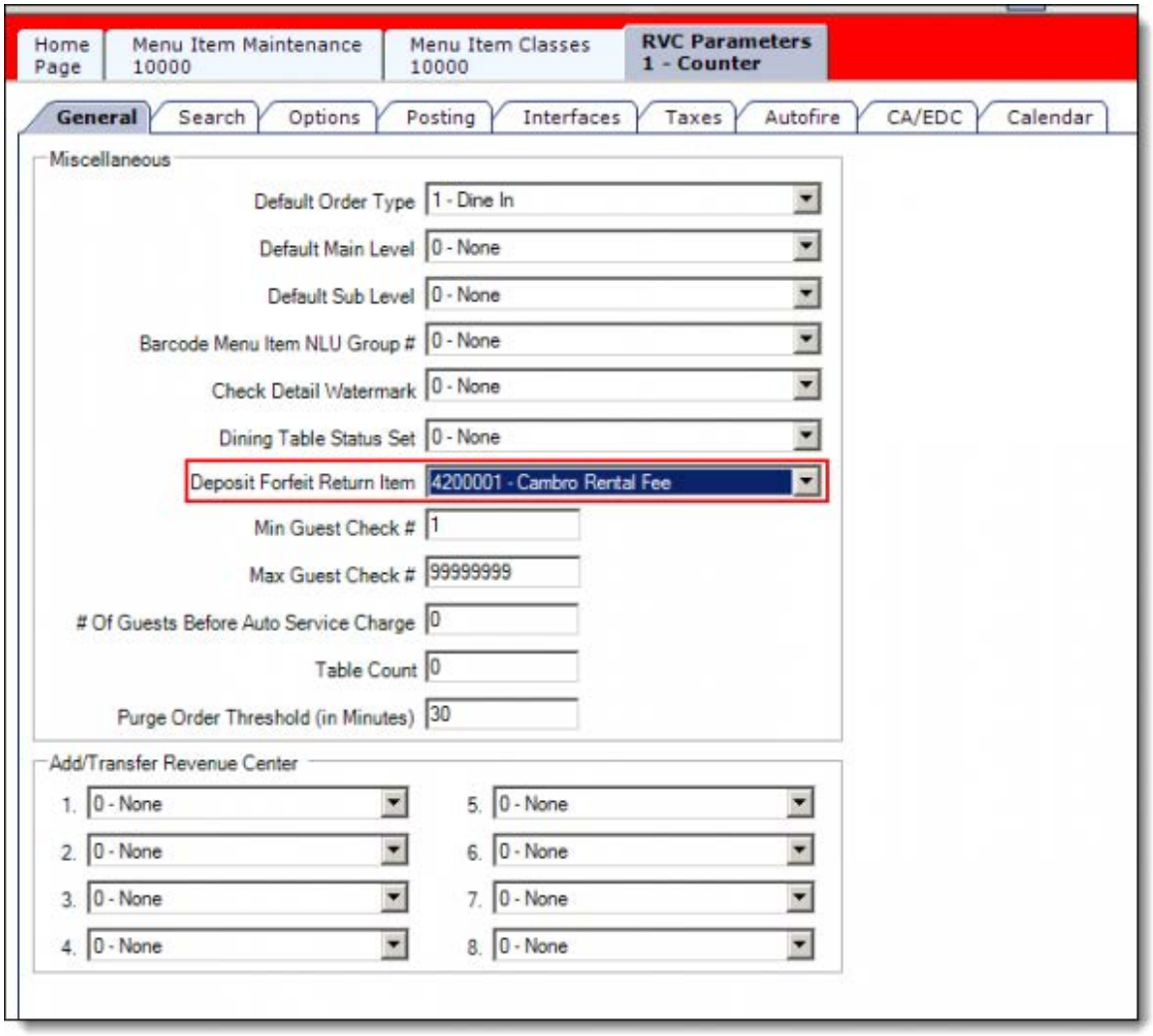
2. Add a new **Menu Item Class** for a

Rental Item in the **Menu Item**

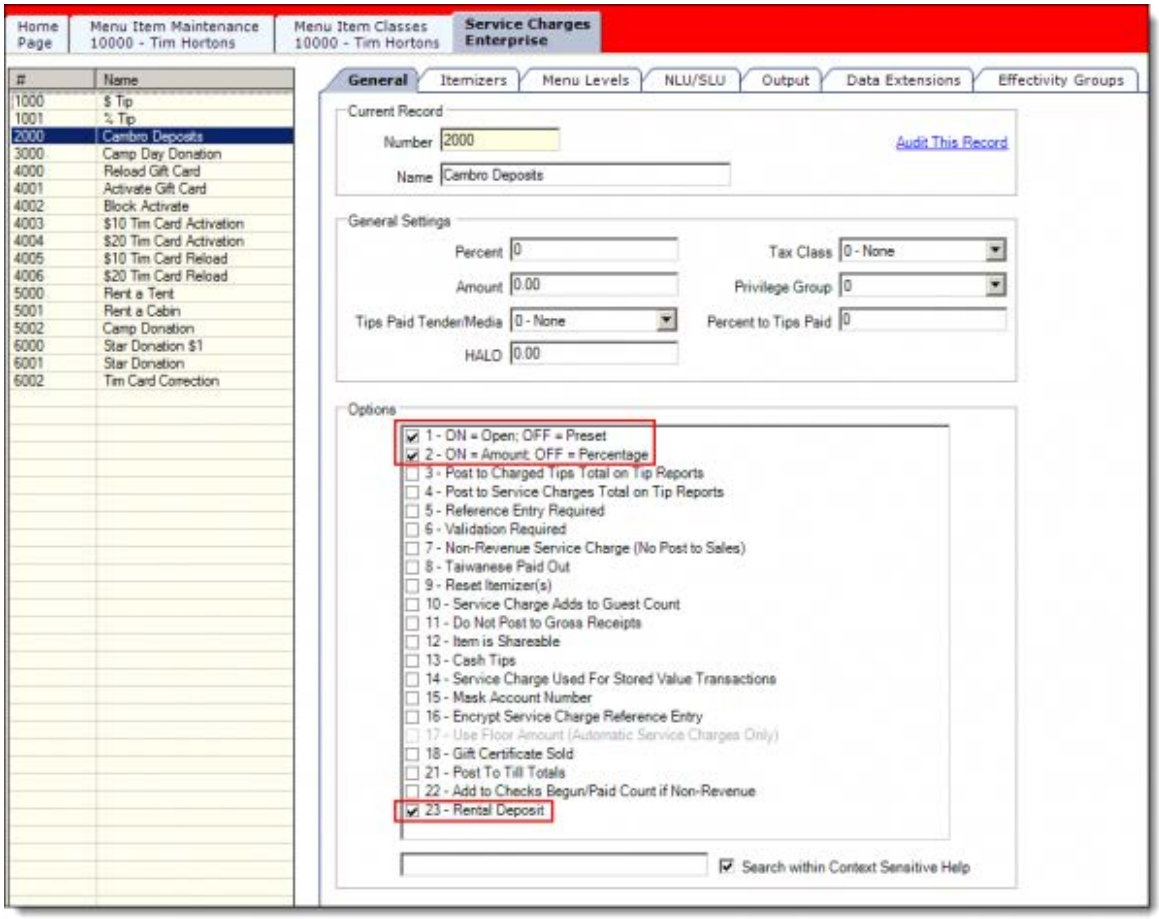


Classes module and enable the **[64- Rental Deposit]** option.

3. Select a Rental Menu Item from the **Deposit Forfeit Return Item** field.

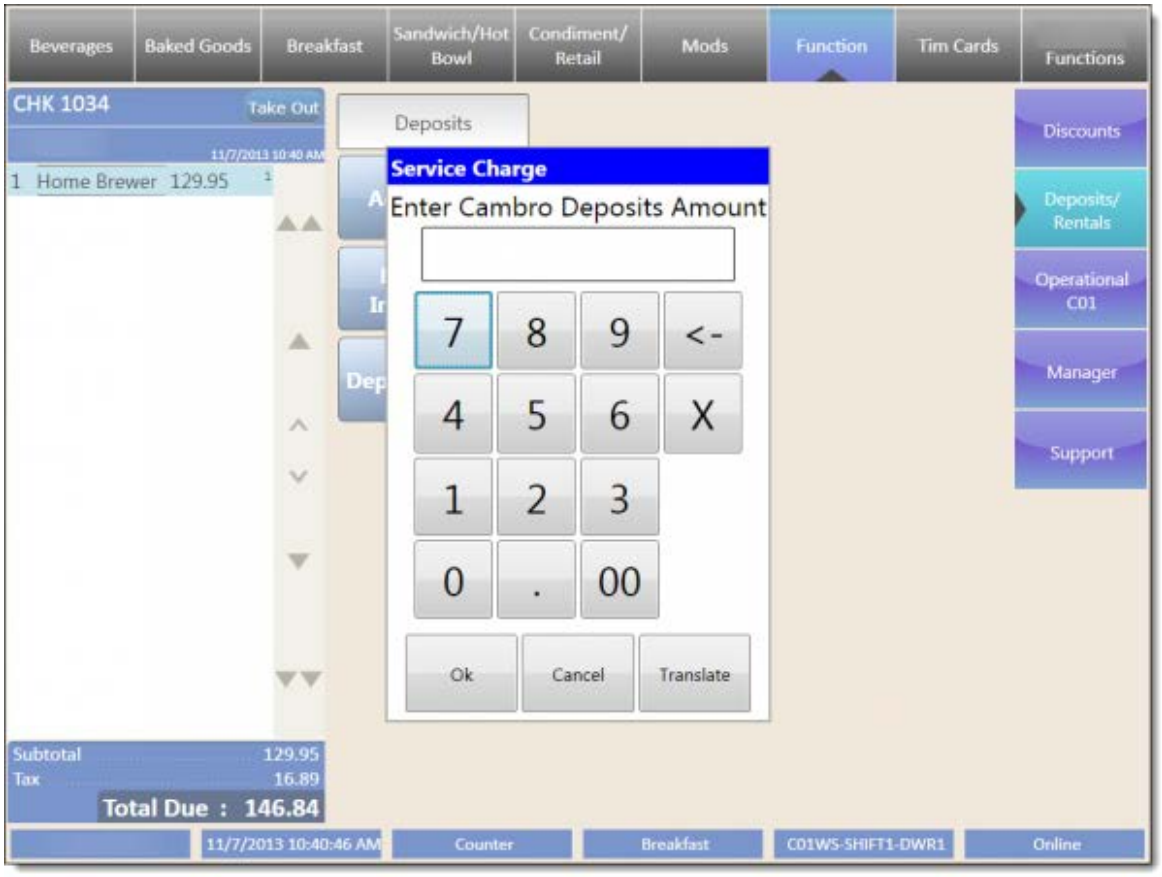


4. Add **Open Service Charge** for the Rental Item and enable option **[23- Rental Deposit]** to use this Service Charge as a Rental Deposit and option **[1-ON-open, Off-preset]** to make this Service Charge an "Open Service Charge". Alternatively, instead of enabling option **[1-ON-open, Off-preset]**, the user can enable option **[2-ON = Amount; OFF = Percentage]** to make this Service Charge an "Amount Service Charge".

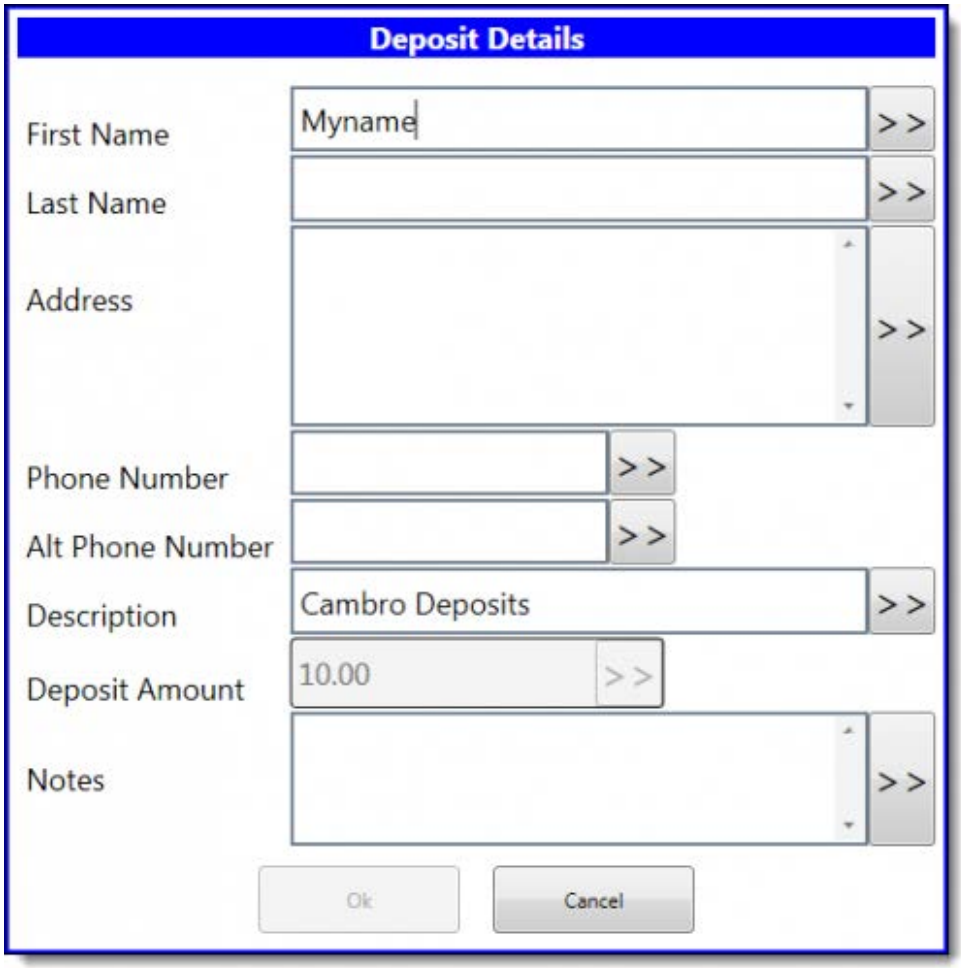


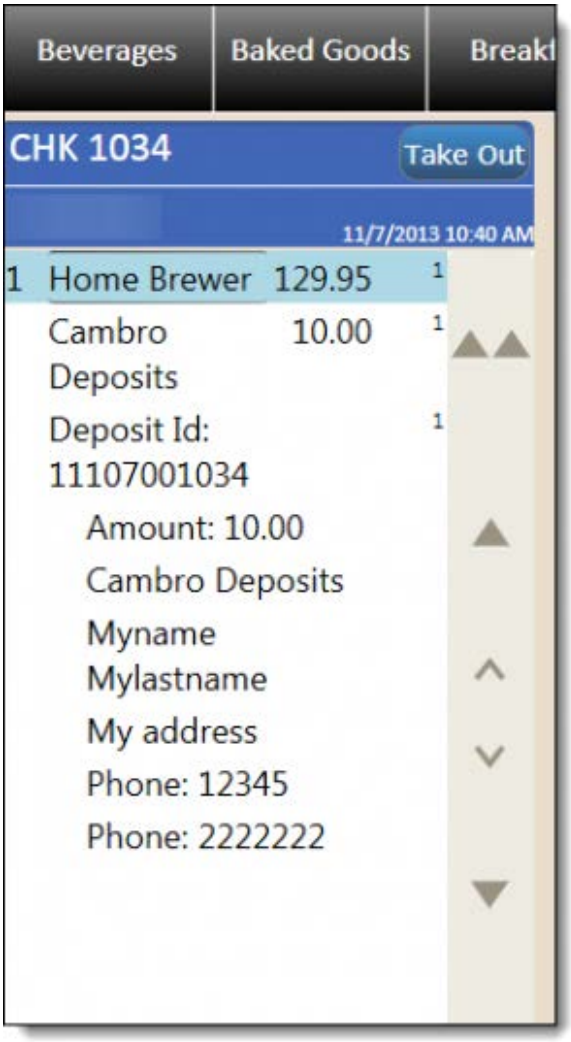
To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit

1. At the Workstation, begin a check and ring in Menu Items.
2. Select a Menu Item and apply a Service Charge (if using the Service Charge option).



3. Click **Apply Deposit**, enter Deposit information, and click **OK**. The Deposit information is saved and displayed in the **Check Detail Area**.

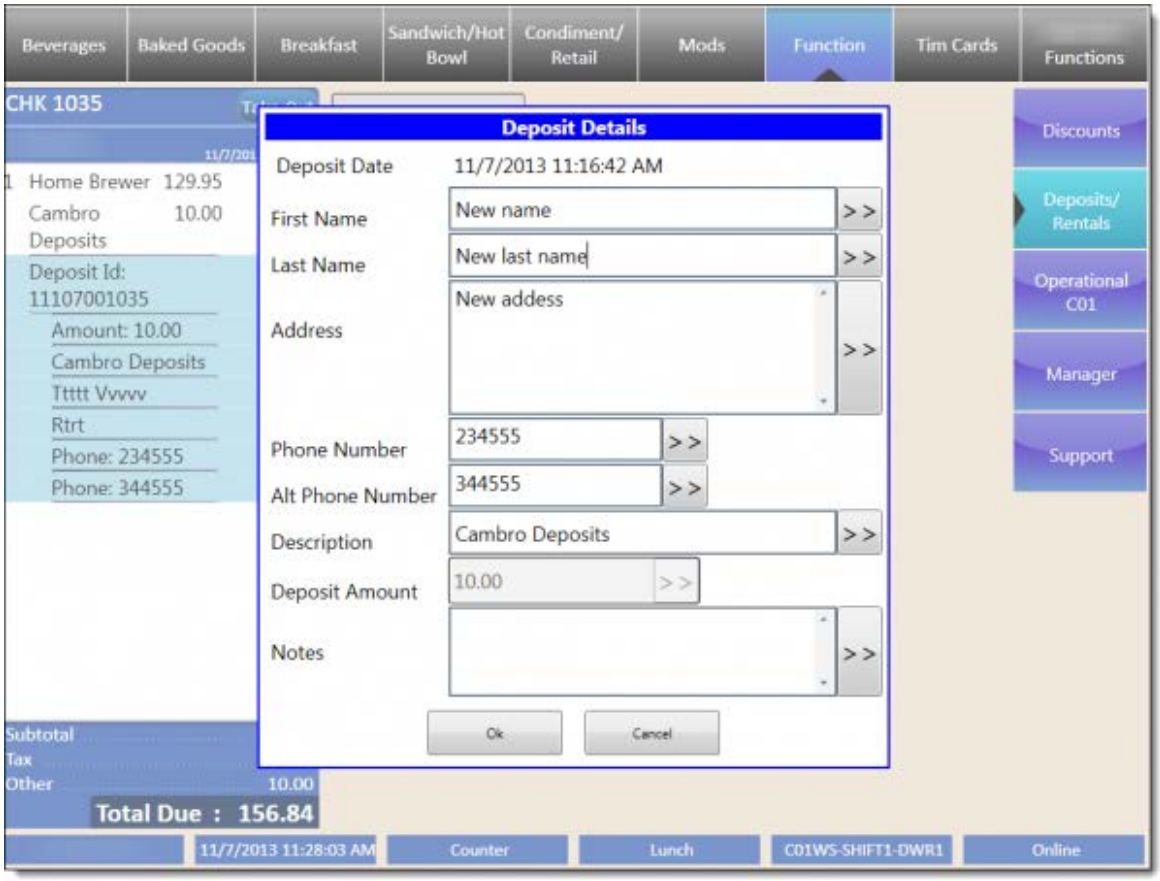




Users can also add a button for their Menu Item so that they do not have to look for it on other pages.

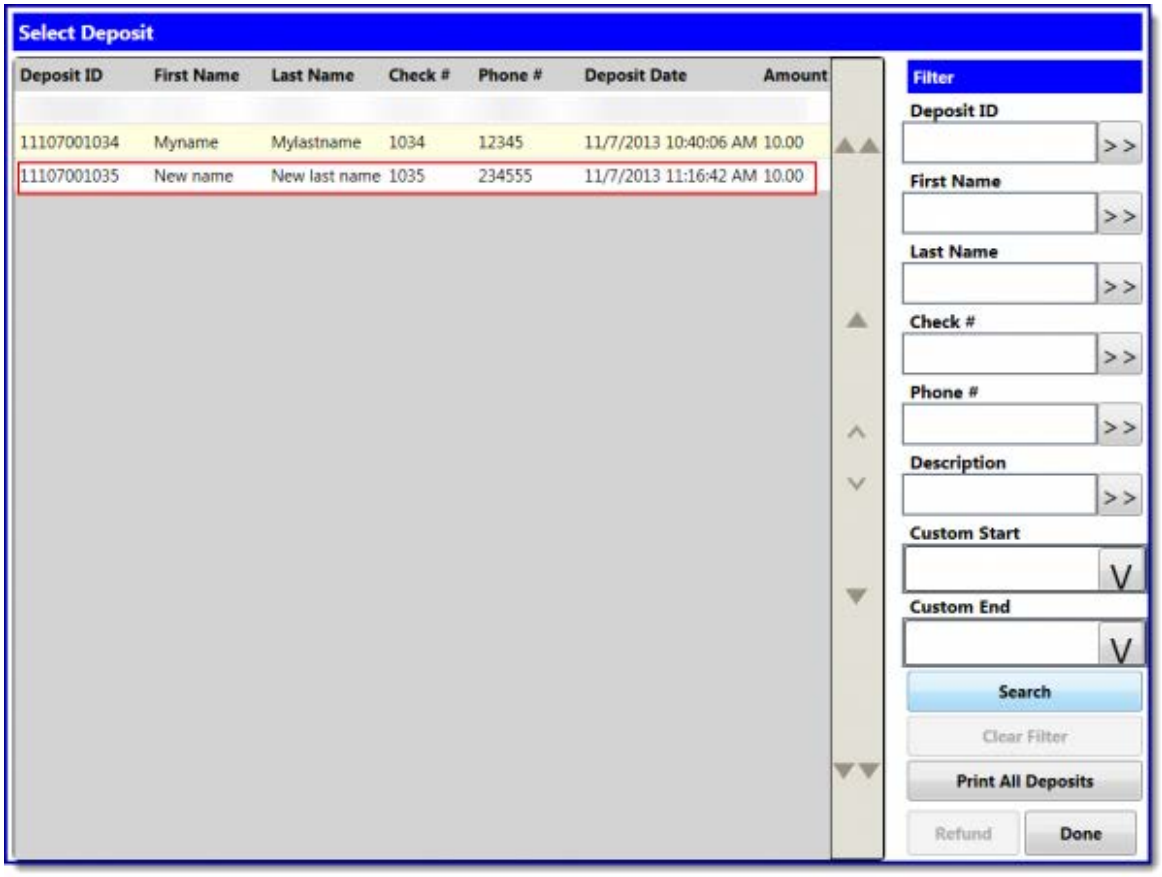
To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Edit Deposit

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Click the **Edit Deposit** button to edit Deposit Details and click **OK**.



To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Show Deposits

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation.
4. Click the **Show Deposit** button to display the Select Deposit dialog.
5. Click the **Search** button to display the list of Deposits that have been made.



To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Deposit Number

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction
3. Sign into a Workstation and click the **Show Deposit** button**.**
4. Enter the deposit number provided from the Receipt.
5. Click the **Search** button to return the Deposit created by the Operator and the Deposit number entered, which should be the same as the specified number in step 4.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by First Name/Last Name

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction - the check is closed and the Deposit is created. A Receipt with the Deposit information is printed.
3. Sign into a Workstation and click the **Show Deposit** button.
4. Enter the **First Name** that was entered when creating the Deposit.

5. Click **Search** to return a Record with the specified First Name.
6. Clear the Filter to clear the Deposit information.
7. Enter the **Last Name** that was entered when creating the Deposit. Search results return a Record with the specified Last Name.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Check Number

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Enter a Check Number that was generated during Deposit creation.
5. Click **Search** to return a Record with the specified Check Number and correct Deposit.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Phone Number

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Enter the Phone Number that was entered when creating the Deposit.
5. Click **Search** to return a Record with the specified Phone Number.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Custom Start and Custom End Date

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Enter the date range during which the Deposit(s) was created.
5. Click **Search** to return a Record with the Deposit(s) created during that period of time.

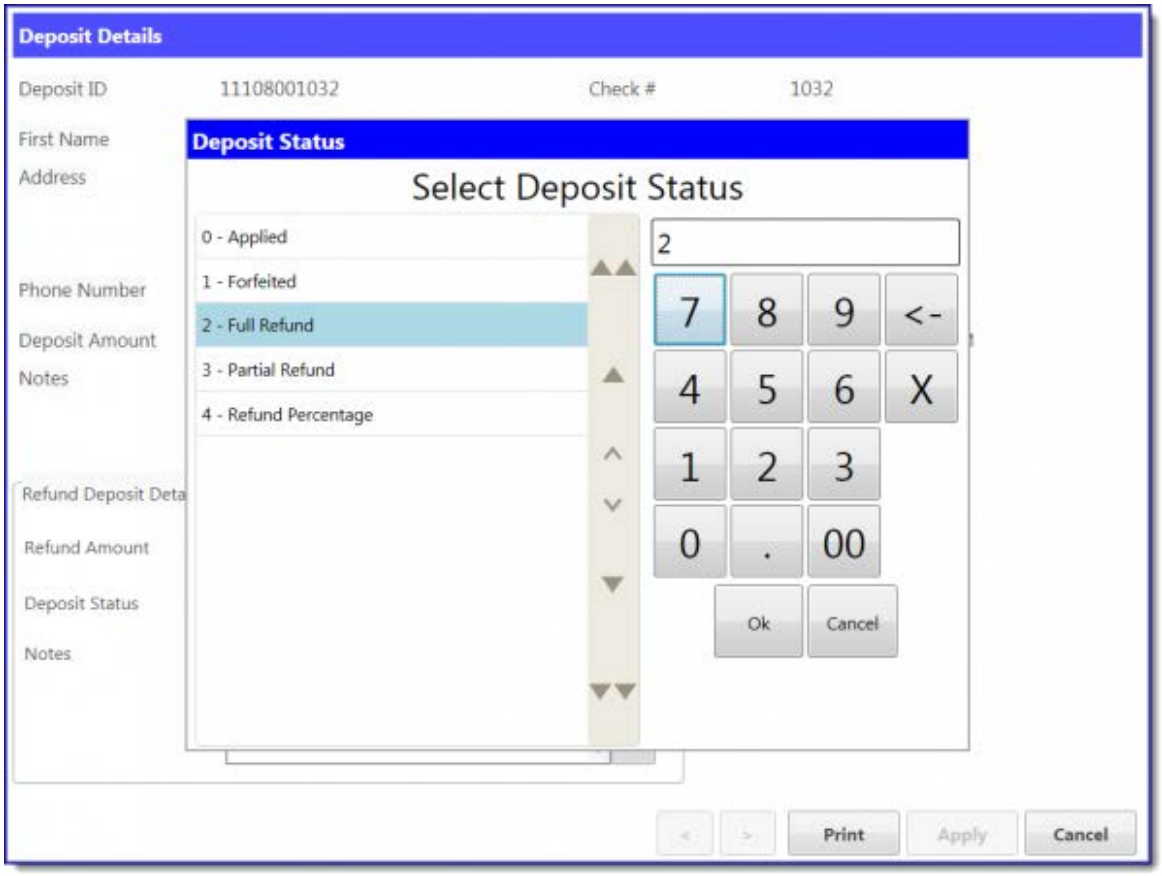
To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Perform Search by Description

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.

2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Enter Key Word(s) specified in a description of a Deposit created in a Previous round.
5. Click **Search** to return a Record with the Deposit(s) where Key Word(s) are found.

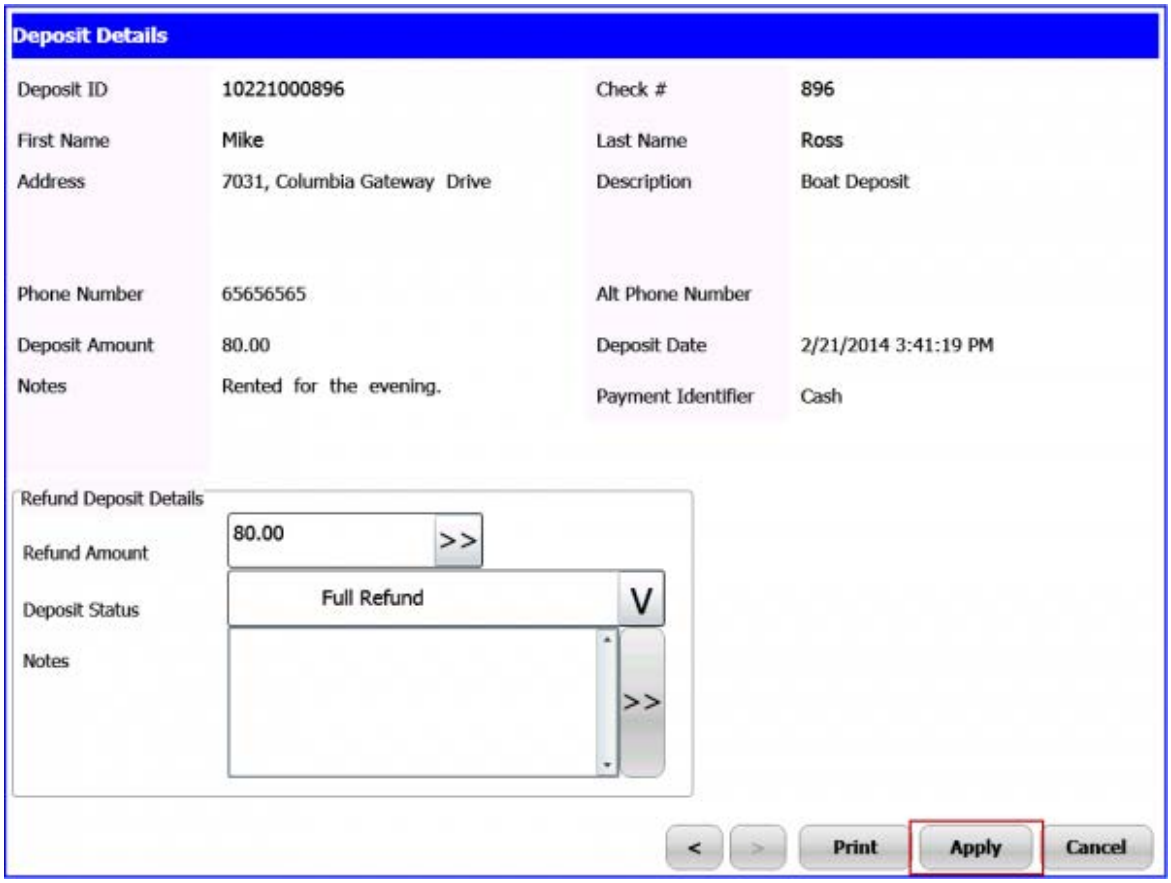
To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Full Refund

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction - the Check is printed showing that the Rental Item/Deposit was returned.
3. Sign into a Workstation and click **Show Deposit.**
4. Search for the deposit and click **Refund** to display specified Deposit(s).

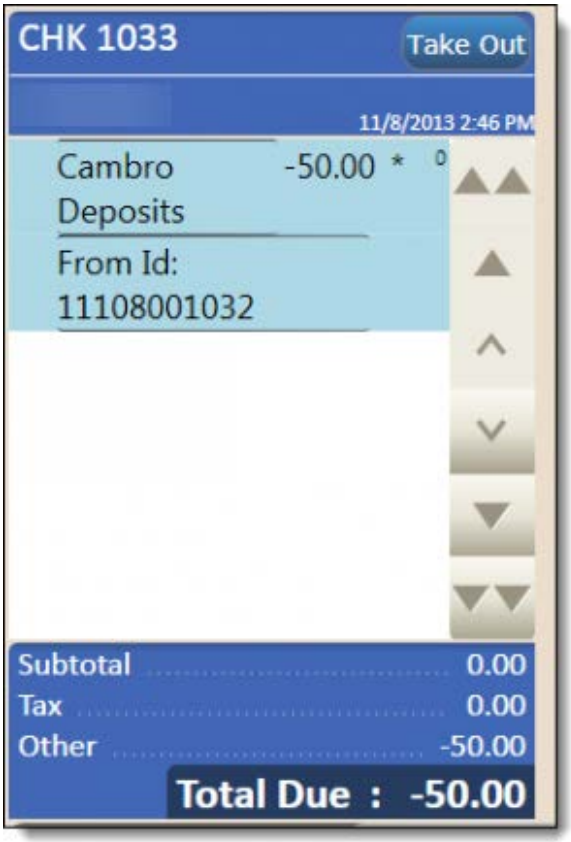


5. Select **Full Refund** under **Refund Deposit Details.**

6. Click **Apply** - the Deposit Details contain all of the information when the Menu Item was rented (Name, Phone Number and Address) as well as the Deposit ID.



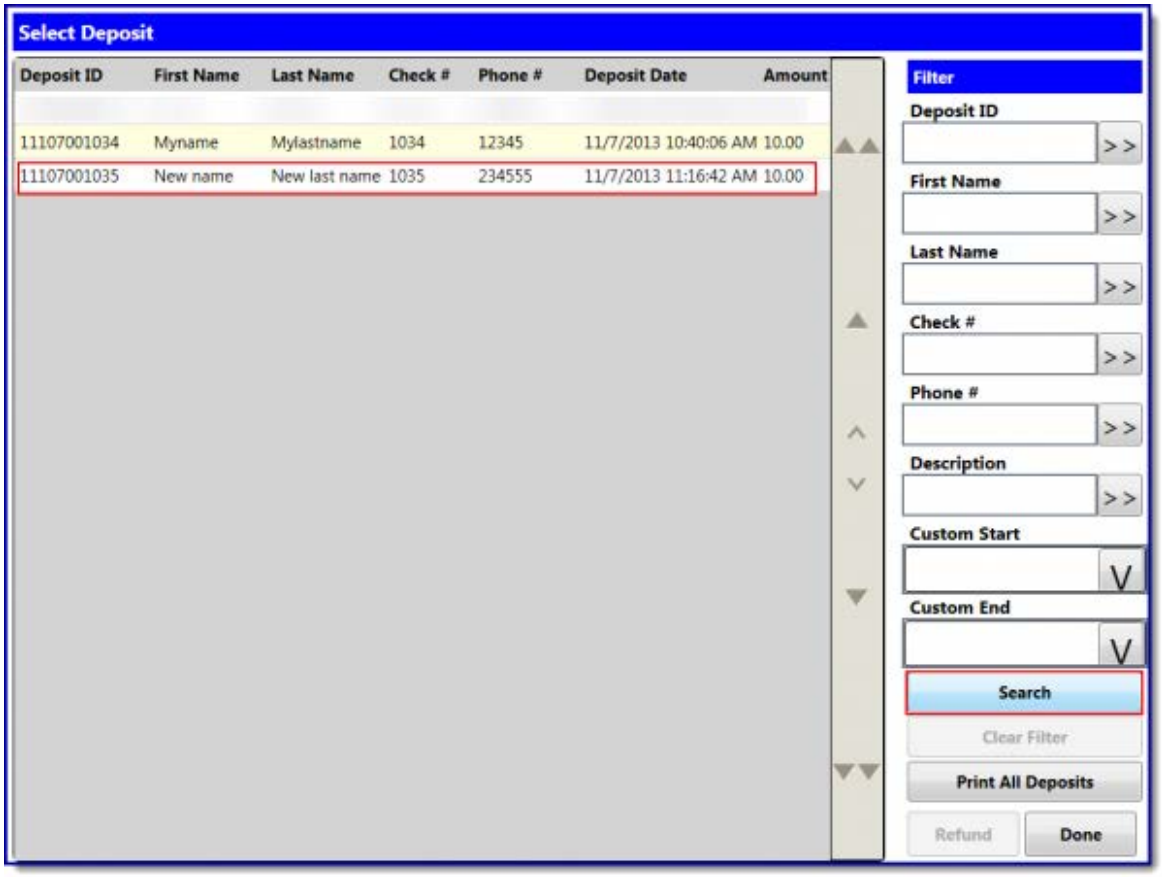
7. The Check Detail Area displays the Menu Item and Deposit ID.



8. Tender the Transaction.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Print Deposit Report

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Search for the Deposit(s) to display.

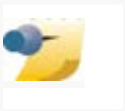


5. Click **Refund.**
6. Click **Print** for the Receipt displaying one refunded Deposit.
7. Click **Print All** for a report displaying multiple refunded Deposits and their details.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Partial Refund

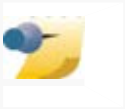
1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction and check **Reports**. The Deposit Amount is added to Non-Revenue Service Charge (if using a Service Charge configuration and not a Menu Item).
3. Sign into a Workstation and click **Show Deposit.**
4. Search for the Deposit, click **Refund** and select an Amount to display specified Deposit(s). The Deposit Detail contains

all of the information pertaining to when the Menu Item was rented.



Print the Check to display that the Rental Item/Deposit was returned and the amount returned (partial amount).

5. Under **Refund Deposit Details**, select **Partial Refund** and then enter the amount.
6. Click **Apply.**
7. Tender the Transaction - the Partial Refund Amount is added to Net Sales. The Non-Revenue Service Charge is $0.00 at this point.



This applies only to Deposits that are applied as a Service Charge.

Example:

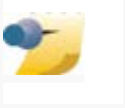
A Deposit was $150.00. The Rental Item is damaged so the customer will only receive $60 and the business will retain $90.00.

Refund Check itemization
1 Non-Refunded Menu Item $90.00
1 Rental Deposit -$150.00
Refund Payment -$60.00
This check adds $90.00 to Net Sales.

8. Check **Reports.**

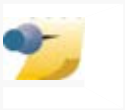
To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Percentage Refund

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction and check **Reports**. The Deposit Amount is added to the Non-Revenue Service Charge (if using a Service Charge configuration and not a Menu Item).
3. Sign into a Workstation and click **Show Deposit.**
4. Search for the Deposit and click **Refund** to display the specified Deposit(s). The Deposit Detail contains all of the information pertaining to when the Menu Item was rented.



Print the Check to display that the **Rental Item/Deposit** was returned and the amount returned (partial amount).

5. Under **Refund Deposit Details**, select **Percentage Refund** and then enter percent to be returned.
6. Click **Apply.**
7. Tender the Transaction.
8. Check **Reports** - the Partial Refund Amount is added to Net Sales. The Non-Revenue Service Charge is $0.00 at this point.



This applies only to Deposits that are applied as a Service Charge.

Example:

A Deposit was $150.00. The Rental Item is damaged so the customer will only receive $60 and the business will retain $90.00.

Refund Check itemization
1 Non-Refunded Menu Item $90.00
1 Rental Deposit -$150.00
Refund Payment -$60.00

This check adds $90.00 to Net Sales.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Posting | New Check is Added to Database after Refund

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Search for the Deposit and click **Refund.**
5. Select **Full Refund** under **Refund Deposit Details.**
6. Click **Apply.**
7. Tender the Transaction.
8. Check the DEPOSIT_INFO_DETAIL table in the Transaction database to verify that the Deposit data has been posted.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Print All Deposits

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Add a few more Deposits using the steps above.
4. Sign into a Workstation and click **Show Deposit.**
5. Click **Search.**
6. Click **Print All.**

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Add menu Item after Deposit is Applied with Different Sorting Methods

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Add
    - Rental Item Menu
    - Regular Menu Item with a Service Charge (if using a Service Charge option)
3. Apply **Deposit.**
4. Add several Menu Items.
5. Select *Parameters-> Configuration tab-> **Screen Sort Type***.
6. Select **[3 - Print Group Consolidated]**.
7. Enable **[46 - Sort and Consolidate Current Round Items on a Screen]**.

- Menu Items can be added regardless of what configuration is used.
- If the **Sorting** option is enabled, the Menu Item is added before the Deposit. When the **Sorting** option is enabled, then Consolidation is also enabled by having selected any consolidated Sort type.
- If **Sorting** is disabled, the Menu Item is added after the Deposit information.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Applying Multiple Deposits to a Check

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. When adding a Rental Menu Item without Voiding the Deposit first, an error message displays, **"You must void the deposit first".**
3. Click **Add Rental Menu Item.**
4. When adding more than one Deposit, an error message displays, **"Only one deposit allowed"**.
5. Click **Add Deposit** with a single Deposit.
6. When adding a Menu Item and applying a Non-Revenue Service Charge, an error message displays, **"You must void the deposit first"**.
7. Add the Menu Item and apply **Non-Revenue Service Charge.**

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit to a Regular Menu Item

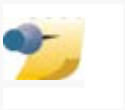
1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. When adding a Regular Menu Item to a Check instead of a Rental Menu Item, the error message, **"Add a rental menu item or service charge before applying deposit"** is displayed.
3. Click **Apply Deposit**

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits for Rental | Void Deposit

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. When selecting a Menu Item and clicking **Void**, the error message, **"Error. You must void the deposit first"** is displayed.
3. Select Deposit information and click **Void** to Void the Deposit.
4. Void the Menu Item.

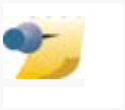
To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Refund to a Credit Card

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Search for the Deposit and click **Refund.**



The Refund is made to the customer's Credit Card.

5. Select **Full Refund** under **Refund Deposit Details.**
6. Click **Apply.**
7. Tender the Transaction.



Credit Cards are configured on a system.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Refund a Check from a Different Workstation (the same Revenue Center (RVC))

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Open a new Check on a second Workstation and click **Show Deposit.**
4. Search for the Deposit to display the Deposit(s) information.
5. Click **Refund.**

The Refund is applied and Deposit information is added to a check.

6. Select the Refund method (i.e., Full, Partial, Percentage, and Forfeited) and apply the changes.

The Check is printed with Refund information.

7. Tender the Transaction.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Cancel Transaction after Refund is Applied

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Search for the Deposit to display the Deposit(s) information.
5. Select the Refund amount and status in the **Deposit Details** screen.
6. Depending on the selected option, the Refund will be added to a Check.
7. Cancel the Transaction.

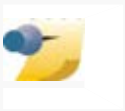
- When trying to cancel a transaction that has a Deposit Refund, the message, "**The deposit refund has been saved. Any other changes will be removed**." is displayed.
- When a check with a Deposit is cancelled, it can be found under the Open Check SLU.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Change Deposit Amount

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Change the Deposit Amount.

The **Deposit Amount** field is grayed out and the amount cannot be changed.

3. Pay the Deposit.



The Deposit Amount is the same and cannot be changed.

4. Open a new Check.
5. Click **Show Deposit** and perform a search for this newly created Deposit to display the Deposit information.
6. Click **Refund.**

The **Refund Amount** is the same as the amount entered in the first round.

7. Click **Apply.**

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Show Deposit | Search when Offline to CAPS

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Create a Deposit on each Workstation and Pay to Cash.
3. Shut down CAPS.
4. On a second **Workstation**, when selecting *Show Deposit-> Search*, a message notifies the User that CAPS is not available and that a search is not available when CAPS is down.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Refund | Forfeited

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure.
2. Tender the Transaction.
3. Sign into a Workstation and click **Show Deposit.**
4. Search for the Deposit and click **Refund.**
5. Select **Forfeited** under **Refund Deposit Details.**
6. Click **Apply.**

The Menu Item with the Deposit ID is added to the Check with the amount due (Refund payment) 0.00. Forfeits amounts should be added to a check.

7. Tender the Transaction.
8. Check **Reports.**

All Deposit Amounts should be added to Net Sales.

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | How to Configure Deposits as a Service Charge

1. Add a New Menu Item Class, **Rental Item**, in Menu Item Classes and enable option **[64- Rental Deposit]**.
2. Add an open **Service Charge** for a **Rental Item** and enable option **[23- Rental Deposit]** and option **[1- ON-open, OFF-preset]** (users can also enable option 2 instead of option 1 depending on what is needed).
3. Define Return Menu Item in a Revenue Center (RVC).
4. Add a Service Charge for the Rental Item and enable option **[23- Rental Deposit]**.
5. Add four function buttons in Page Design.

    - Edit Deposit
    - Apply Deposit
    - Show Deposit
    - Service Charge (created in step 2)

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Open a Check with a Deposit from a Different Revenue Center (RVC)

1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure on the first Workstation.
2. Tender the Transaction.
3. Sign into a second Workstation (with a different RVC assigned) and click **Show Deposit.**
4. Search for the Deposit.

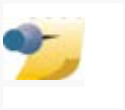
Search results should not return Deposit(s) information from a different RVC.

5. Click **Refund** and select the type of Refund required (**Full**, **Partial**, **Percentage** or **Forfeited**).
6. Click **Apply.**

To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Void Deposit Information in a 2nd Round

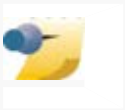
1. Follow steps 1 - 6 in the **To configure Deposits in EMC with a Menu Item or a Service Charge using Deposits | Apply Deposit** procedure on the first Workstation.

2. Service Total the check.
3. Pick up the Open check.



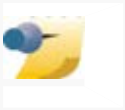
The Check is shown in the Check Detail Area.

4. Void the Service Charge or Menu Item (only if using Menu Item configuration).



An error message displays, **"Error. You must void the deposit first"** in both configurations.

5. Void the Deposit information/Guest information.
6. Void the Service Charge (if Service Charge configuration is used) or Menu Item (if Menu Item Configuration is used).



If using a Service Charge configuration for Deposits, the Menu Item can be Voided at any time, as the Deposit/Guest information is attached to the Service Charge.

See also

- Simphony 2.6

Reopen Closed Check

Reopen Closed Check is a function key that allows a closed check to be opened and used again, at which point tenders, menu items, discounts, and service charges may then be added or removed; the check is a regular guest check. If there was change due to when the check was closed, the last tender entry must be removed (voided) before any other changes are made to the check.

This article discusses the usage of one or more **Function Keys**. (423, 443)

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Example Usage
- 2 Reporting
- 3 Reopening from Previous Business Days
  - 3.1 Workstation Usage
  - 3.2 Reporting
- 4 EMC Configuration
- 5 Other Considerations
- 6 Privileges
- 7 See also

Example Usage

A guest check is closed with a tendering key. The customer then decides that he will have that piece of pie for dessert after all. The server presses the **[Reopen Closed Check]** key. The workstation prompts for the check number, which the server enters. The check is reopened. The server enters the pie and tenders the check to close it for (probably) the last time.

Reporting

For Report Writer reports, a “j” prints in the status field for any check that has been reopened. The PMC Reports use a capital letter (“J”).

Reopening from Previous Business Days

While the **[Reopen Closed Check]** function key (423) only allows checks from the current business day to be adjusted, another function, 443, **[Reopen Closed Check (Prev. Days)]** allows check adjustments to occur for the current business day *and* previous business days, for a predefined number of days. The number of days allowed for reopening closed checks is configured in RVC Parameters on the Posting and Control tab.

Workstation Usage

To use this key at the Workstation:

1. Press the **[Reopen Closed Check (Previous Days)]** function key (443)
2. When the key is pressed, the workstation will allow checks to be reopened for the current Revenue Center, for the number of days specified in the RVC Parameter field.
    - If the field is set to 0, only the current business day's checks will be accessible.

Reporting

Reporting numbers for a previous day cannot be changed by use of the **[Reopen Closed Check from Previous Business Days]** function keys. When a check is reopened from a previous day, only the current day's checks and totals are affected. It should be noted that reopening from a previous day will make reports seem "out of balance" for a day. However, when reports are taken for a larger period of days (including the date of the original check and the date of the reopening), the reports are indeed "in balance." Please reference the following example:

- Scenario: Check #1000 from April 10, closed for $10.00. To make this example simple to follow, no other checks are opened in the system. The check is reopened on April 15.

The user reopens the check, voids the payment, and service totals the check, a report will show the following figures:

```
Checks Begun    1   0.00
Checks Paid     0 -10.00
Outstanding     1  10.00
```

Tender totals will show -10.00 (cash tender, for example).

If the user then adds $2.00 to the check and pays it, the report will show the following figures:

```
Checks Begun    1   2.00
Checks Paid     1   2.00
Outstanding     0   0.00
```

Tender totals will show 2.00.

Taking a report for the entire period (for instance, the week including April 10 and April 15), the report shows:

```
Checks Begun    2  12.00
Checks Paid     2  12.00
Outstanding     0   0.00
```

Tender totals will show $12; and this information is correct. Two checks were begun (the reopened check counts as another check entry), and both were paid. The $12.00 total includes checks from both days.

EMC Configuration

Revenue Center Parameters contains a few options that relate to reopening closed checks. These options can be enabled or disabled based on site preferences:

Keep the Same Check Number When a Check is Reopened

Select this option (#37 in Options/General) to cause a reopened guest check to retain its original guest check number. Disable this option to cause a reopened check to be assigned a new check number.

Allow Changes to Menu Items on Closed Checks

Select this option (#14 in Posting and Control) to allow privileged operators to make changes (additions, voids, etc.) to the menu item postings on closed checks, after they have been reopened.

Allow Service Total of Closed checks

Enable this option (#15 in Posting and Control) to allow privileged operators to service total closed checks.

Other Considerations

Generally, the Reopen Closed Check function keys should be programmed on the Default Transaction Screen. Additionally, there are considerations to keep in mind when reopening checks from a previous day:

- While the maximum value of the RVC Parameter fields "Number of Days to Reopen Closed Checks" is 999 days, checks are purged from the Simphony system after approximately six weeks. Therefore, it is typically not possible to reopen checks that are more than six weeks old.
- It is not possible to void a credit card payment on a check when that credit card payment has already been batched by the Simphony system.

Privileges

An operator has access to the Reopen function keys only when associated with an Employee Role with the proper privileges:

- Authorize/Perform Reopen Closed Check
- Auth/Perform Reopen Closed Check from Previous Business Days

Three other options relating to reopening checks are found in the Employee Role module:

- Authorize/Perform Void of Menu Items on a Closed Check
- Authorize/Perform Void of Discounts on a Closed Check
- Authorize/Perform Void of Service Charges on a Closed Check

Reporting Enhancements 2x

With the release of Simphony v2.7 GR, the following reporting functions have been enhanced:

- Report Groups capabilities
- Report Templates
- Report Mail functions

This article describes these enhancements and the changes made to the existing functionality.

This article discusses functionality that relates to **Simphony v2.x**.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Report Groups Enhancements
  - 1.1 To add a report group to Service Charges or Discounts
  - 1.2 To link the report group to a Service Charge
  - 1.3 To link the report group to a Discount
  - 1.4 Report Parameters
- 2 Report Template Enhancements
  - 2.1 New templates in Simphony v2.7 GR
- 3 Report Mail Enhancements
  - 3.1 To define the reports in mymicros.net
- 4 See Also

Report Groups Enhancements

The **Type** drop-down menu in the Report Groups module now includes two new types: Service Charge and Discount. Adding report groups to a service charge or discount gives the ability to group similar service charges and discounts together in order to get a subtotal amount by that report group.

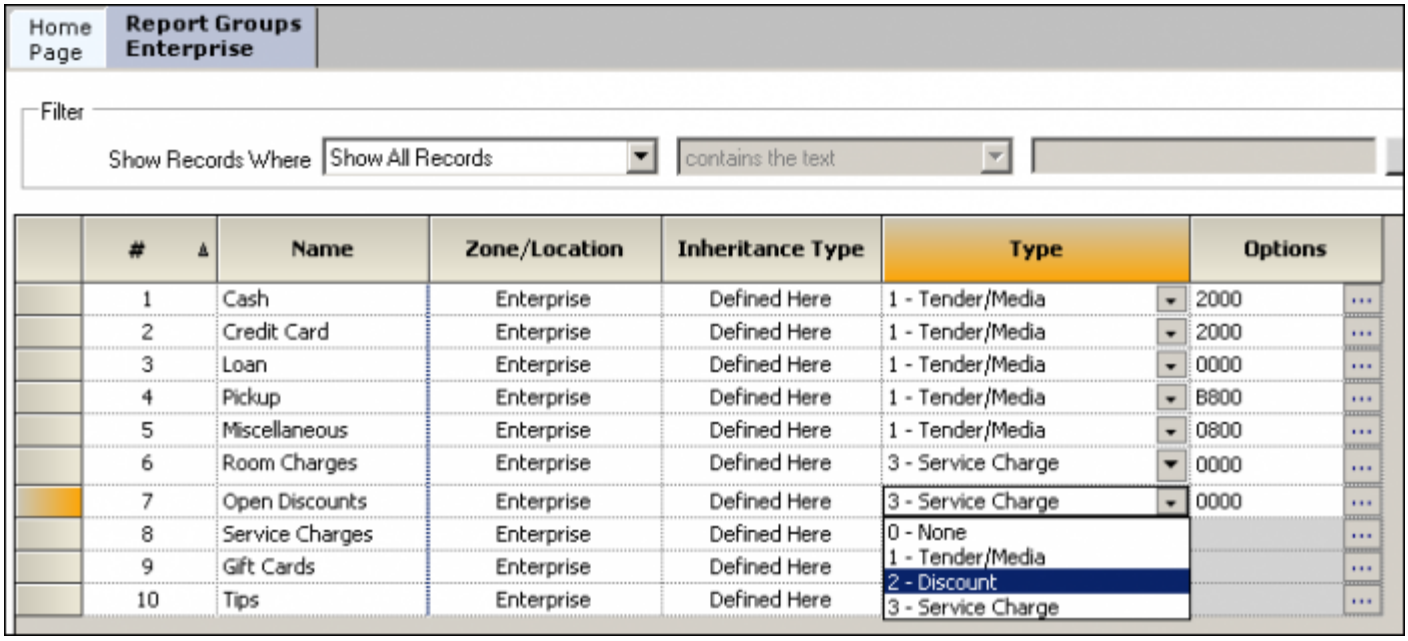
You can configure a specific service charge or a discount report group to not show in the service charges or discount breakdown section on financial reports. To enable the options, click the ... icon of the respective discount or service charge report group under the **Options** column.

[3 - Do Not Include in Service Charge Breakdown Section]

- Enable this option to prevent the service charge group from showing in the Service Charge Breakdown section of the reports.

[3 - Do Not Include in Discount Breakdown Section]

- Enable this option to prevent the discount group from showing in the Discount Breakdown section of the reports.



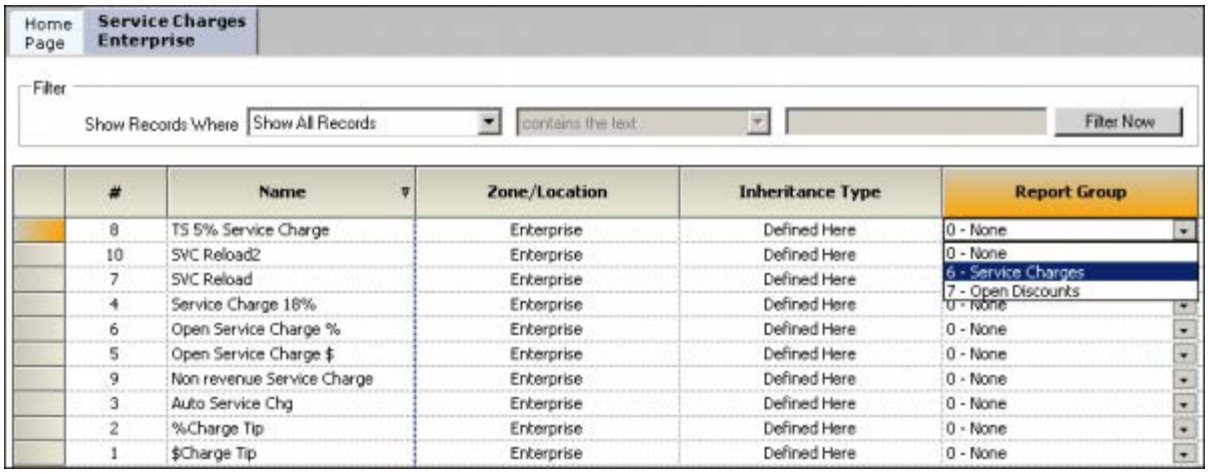
To add a report group to Service Charges or Discounts

1. Navigate to *EMC > <Enterprise / Property / Zones> > Configuration tab > Reporting and Data >* ***Report Groups***.
2. Insert a new record.
3. Define the object number.
4. If you want to use a template, select the **Use Template** check box and select a template.
5. Define a Record Name.
6. Click **OK**.
7. Select the type as Service Charge or Discount from the **Type** drop-down menu.
8. Click **Save**.

You then need to link the Report Group to either a Service Charge or a Discount.

To link the report group to a Service Charge

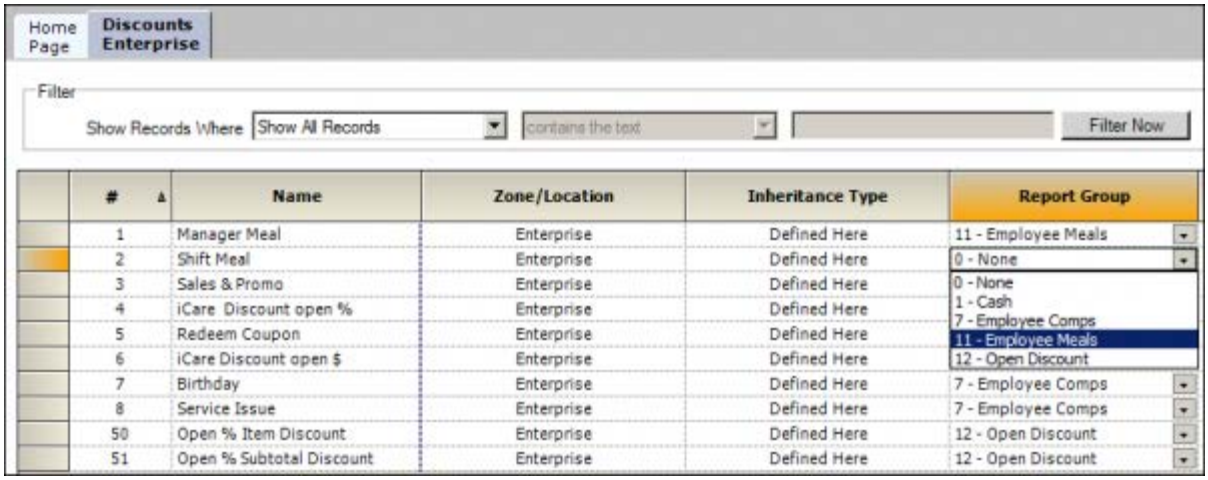
1. Navigate to *EMC > <Enterprise / Zone / Property > > Configuration tab > Sales header >* ***Service Charges***.
2. Select the service charge.
3. Select the service charge report group configured in the Report Groups module from the Report Group drop-down menu.



4. Click **Save**.

To link the report group to a Discount

1. Navigate to *EMC > <Enterprise / Zone / Property > > Configuration tab > Sales header >* ***Discounts***
2. Select the discount.
3. Select the discount report group configured in the Report Groups module from the Report Group drop-down menu.



4. Click **Save**.

Report Parameters

Two new options have been added to prevent workstations from printing discount and service charge breakdowns on financial reports.

Navigate to the *EMC > <Enterprise / Zone / Property > > Setup tab > Parameters header > Report Parameters >* ***Options*** tab, and select:

[26 - Do Not Print the Discount Breakdown on Financial Reports]

- Enable this option to not print the Discount section on financial reports.
- Disable this option to print a line for each active discount that includes the discount name, percent, total and count, sorted by report group.

[27 - Do Not Print the Service Charge Breakdown on Financial Reports]

- Enable this option to not print the Service Charge section on financial reports.
- Disable this option to print a line for each active service charge that includes the service charge name, total and count, sorted by report group.

Report Template Enhancements

The following report templates now include Major Group, Family Group, Service Charge, and Discount breakdowns:

- MMSystemFin.xml
- MMCashierFinXtra.xml

The MMEmployeeTip.xml template now includes a Tip Percentage line to show the total percentage of tips claimed by the employee.

The following two templates now show open priced menu items:

- MMMajGrpSales.xml
- MMFamGrpSales.xml

New templates in Simphony v2.7 GR

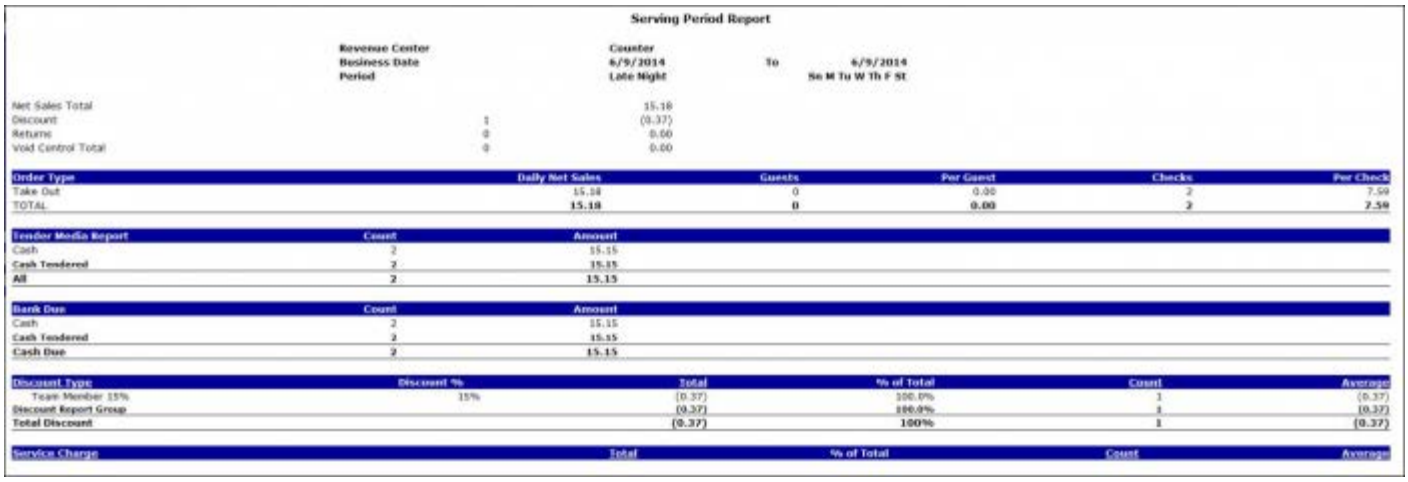
Simphony v2.7 now has the following new report templates:

- ServingPeriodList-Drill.xml

  The ServingPeriodList-Drill.xml template lists all the serving periods configured in the EMC for a particular property. Selecting a serving period shows a detailed view of all transactions posted during the selected period.

- MMServPdFin.xml

  Selecting a serving period from the ServingPeriodList-Drill.xml template navigates you to this report. This report shows data related to all transactions posted during the selected serving period.



Serving Period Report

Revenue Center: Counter
Business Date: 6/9/2014 To 6/9/2014
Period: Late Night Su M Tu W Th F St

Net Sales Total		15.18
Discount	1	(0.37)
Returns	0	0.00
Void Control Total	0	0.00

Order Type	Daily Net Sales	Guests	Per Guest	Checks	Per Check
Take Out	15.18	0	0.00	2	7.59
TOTAL	15.18	0	0.00	2	7.59

Tender Media Report	Count	Amount
Cash	2	15.15
Cash Tendered	2	15.15
All	2	15.15

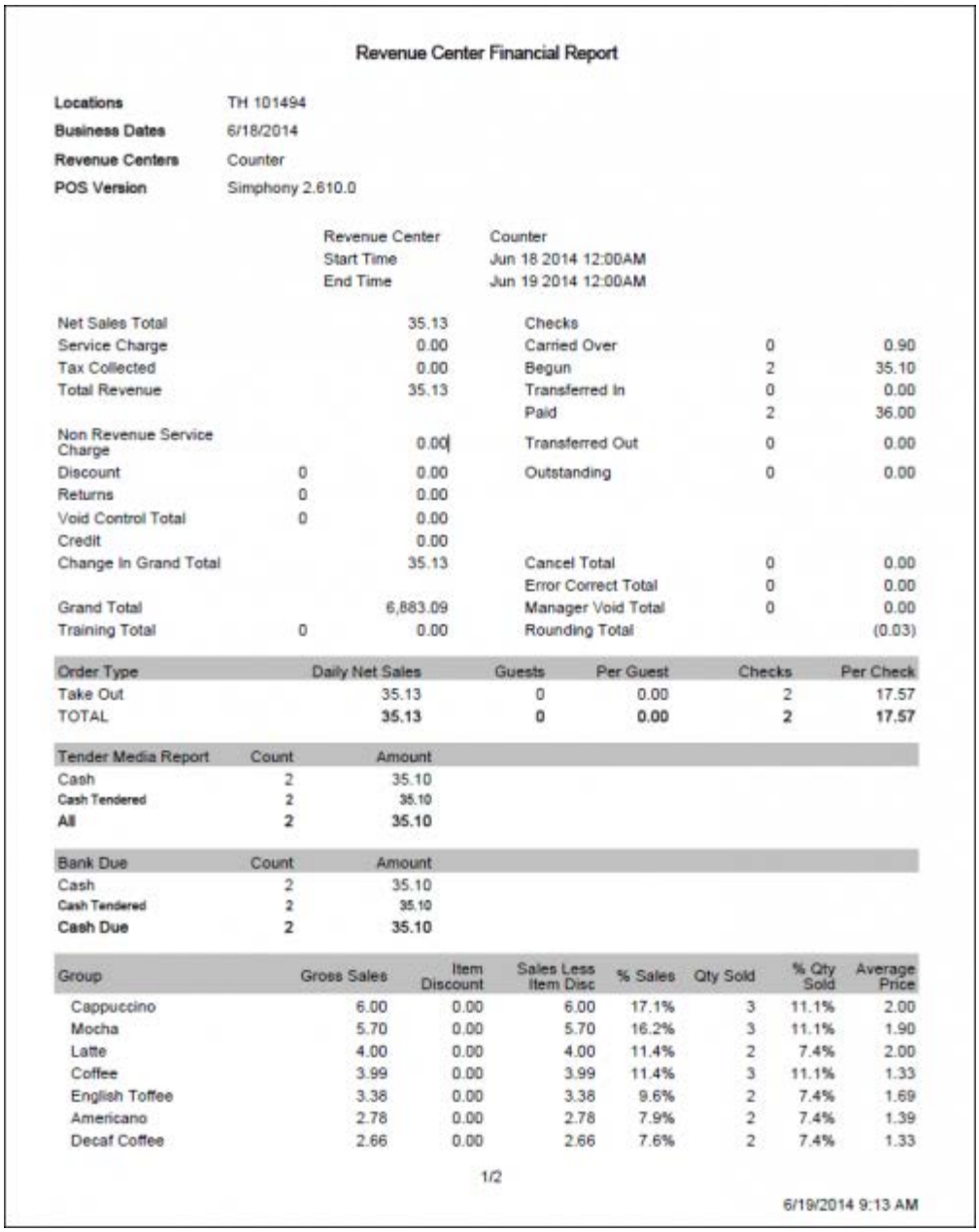
Bank Due	Count	Amount
Cash	2	15.15
Cash Tendered	2	15.15
Cash Due	2	15.15

Discount Type	Discount %	Total	% of Total	Count	Average
Team Member 15%	15%	(0.37)	100.0%	1	(0.37)
Discount Report Group		(0.37)	100.0%	1	(0.37)
Total Discount		(0.37)	100%	1	(0.37)

Service Charge	Total	% of Total	Count	Average

- MMRevCtrFin-ReportMail.xml

  This is the Report Mail Revenue Center Financial Report. This template is specially used for e-mailing the Revenue Center Financial report. The Revenue Center Financial Report provides financial reporting by Revenue Center.



Revenue Center Financial Report

Locations TH 101494
Business Dates 6/18/2014
Revenue Centers Counter
POS Version Simphony 2.610.0

Revenue Center: Counter
Start Time: Jun 18 2014 12:00AM
End Time: Jun 19 2014 12:00AM

Net Sales Total		35.13	Checks		
Service Charge		0.00	Carried Over	0	0.90
Tax Collected		0.00	Begun	2	35.10
Total Revenue		35.13	Transferred In	0	0.00
			Paid	2	36.00
Non Revenue Service Charge		0.00	Transferred Out	0	0.00
Discount	0	0.00	Outstanding	0	0.00
Returns	0	0.00			
Void Control Total	0	0.00			
Credit		0.00			
Change In Grand Total		35.13	Cancel Total	0	0.00
			Error Correct Total	0	0.00
Grand Total		6,883.09	Manager Void Total	0	0.00
Training Total	0	0.00	Rounding Total		(0.03)

Order Type	Daily Net Sales	Guests	Per Guest	Checks	Per Check
Take Out	35.13	0	0.00	2	17.57
TOTAL	**35.13**	**0**	**0.00**	**2**	**17.57**

Tender Media Report	Count	Amount
Cash	2	35.10
Cash Tendered	2	35.10
All	**2**	**35.10**

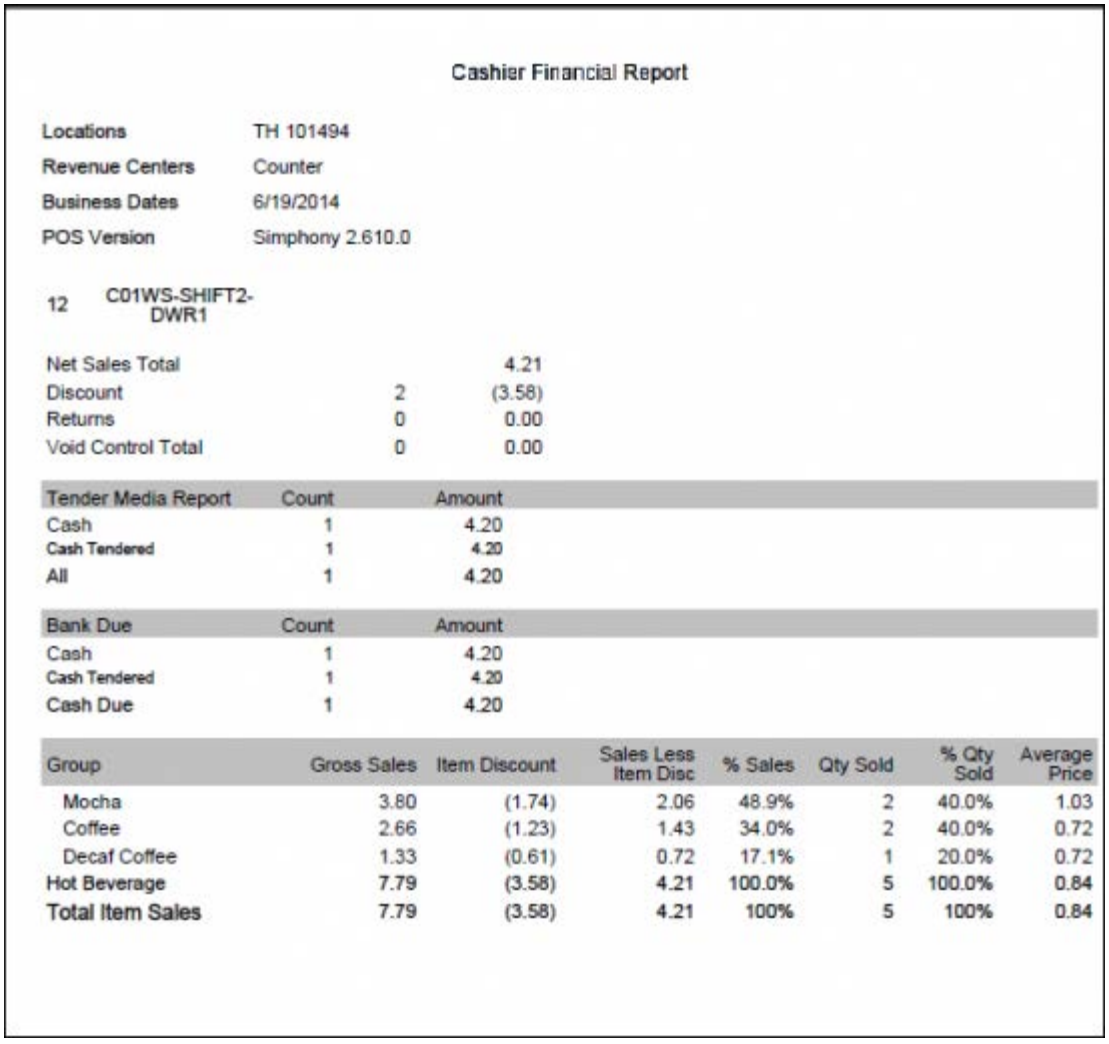
Bank Due	Count	Amount
Cash	2	35.10
Cash Tendered	2	35.10
Cash Due	**2**	**35.10**

Group	Gross Sales	Item Discount	Sales Less Item Disc	% Sales	Qty Sold	% Qty Sold	Average Price
Cappuccino	6.00	0.00	6.00	17.1%	3	11.1%	2.00
Mocha	5.70	0.00	5.70	16.2%	3	11.1%	1.90
Latte	4.00	0.00	4.00	11.4%	2	7.4%	2.00
Coffee	3.99	0.00	3.99	11.4%	3	11.1%	1.33
English Toffee	3.38	0.00	3.38	9.6%	2	7.4%	1.69
Americano	2.78	0.00	2.78	7.9%	2	7.4%	1.39
Decaf Coffee	2.66	0.00	2.66	7.6%	2	7.4%	1.33

6/19/2014 9:13 AM

- MMCashierFin-ReportMail.xml

  This is the Report Mail Cashier Financial Report. This template is specially used for e-mailing the Cashier Financial Report. The Cashier Financial Report provides financial information for each cashier including tenders and tips paid.



Cashier Financial Report

Locations	TH 101494
Revenue Centers	Counter
Business Dates	6/19/2014
POS Version	Simphony 2.610.0

12 C01WS-SHIFT2-DWR1

Net Sales Total		4.21
Discount	2	(3.58)
Returns	0	0.00
Void Control Total	0	0.00

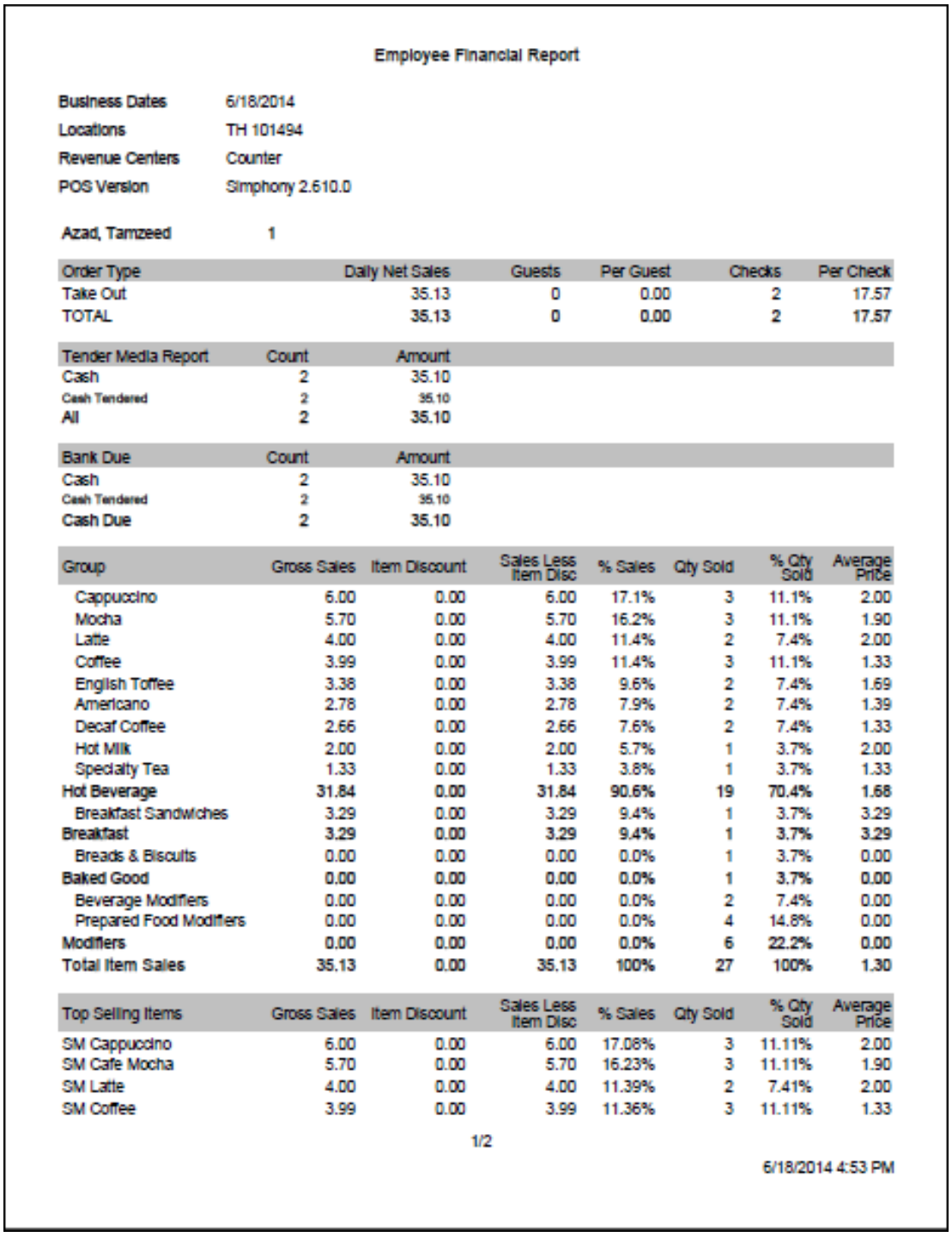
Tender Media Report	Count	Amount
Cash	1	4.20
Cash Tendered	1	4.20
All	1	4.20

Bank Due	Count	Amount
Cash	1	4.20
Cash Tendered	1	4.20
Cash Due	1	4.20

Group	Gross Sales	Item Discount	Sales Less Item Disc	% Sales	Qty Sold	% Qty Sold	Average Price
Mocha	3.80	(1.74)	2.06	48.9%	2	40.0%	1.03
Coffee	2.66	(1.23)	1.43	34.0%	2	40.0%	0.72
Decaf Coffee	1.33	(0.61)	0.72	17.1%	1	20.0%	0.72
Hot Beverage	**7.79**	**(3.58)**	**4.21**	**100.0%**	**5**	**100.0%**	**0.84**
Total Item Sales	**7.79**	**(3.58)**	**4.21**	**100%**	**5**	**100%**	**0.84**

- MMEmpFin-ReportMail.xml

  This is the Report Mail Employee Financial Report. This template is specially used for e-mailing the Employee Financial Report. The Employee Financial Report provides financial information for each employee or operator.



Employee Financial Report

Business Dates	6/18/2014
Locations	TH 101494
Revenue Centers	Counter
POS Version	Simphony 2.610.0

Azad, Tamzeed 1

Order Type	Daily Net Sales	Guests	Per Guest	Checks	Per Check
Take Out	35.13	0	0.00	2	17.57
TOTAL	35.13	0	0.00	2	17.57

Tender Media Report	Count	Amount
Cash	2	35.10
Cash Tendered	2	35.10
All	2	35.10

Bank Due	Count	Amount
Cash	2	35.10
Cash Tendered	2	35.10
Cash Due	2	35.10

Group	Gross Sales	Item Discount	Sales Less Item Disc	% Sales	Qty Sold	% Qty Sold	Average Price
Cappuccino	6.00	0.00	6.00	17.1%	3	11.1%	2.00
Mocha	5.70	0.00	5.70	16.2%	3	11.1%	1.90
Latte	4.00	0.00	4.00	11.4%	2	7.4%	2.00
Coffee	3.99	0.00	3.99	11.4%	3	11.1%	1.33
English Toffee	3.38	0.00	3.38	9.6%	2	7.4%	1.69
Americano	2.78	0.00	2.78	7.9%	2	7.4%	1.39
Decaf Coffee	2.66	0.00	2.66	7.6%	2	7.4%	1.33
Hot Milk	2.00	0.00	2.00	5.7%	1	3.7%	2.00
Specialty Tea	1.33	0.00	1.33	3.8%	1	3.7%	1.33
Hot Beverage	31.84	0.00	31.84	90.6%	19	70.4%	1.68
Breakfast Sandwiches	3.29	0.00	3.29	9.4%	1	3.7%	3.29
Breakfast	3.29	0.00	3.29	9.4%	1	3.7%	3.29
Breads & Biscuits	0.00	0.00	0.00	0.0%	1	3.7%	0.00
Baked Good	0.00	0.00	0.00	0.0%	1	3.7%	0.00
Beverage Modifiers	0.00	0.00	0.00	0.0%	2	7.4%	0.00
Prepared Food Modifiers	0.00	0.00	0.00	0.0%	4	14.8%	0.00
Modifiers	0.00	0.00	0.00	0.0%	6	22.2%	0.00
Total Item Sales	35.13	0.00	35.13	100%	27	100%	1.30

Top Selling Items	Gross Sales	Item Discount	Sales Less Item Disc	% Sales	Qty Sold	% Qty Sold	Average Price
SM Cappuccino	6.00	0.00	6.00	17.06%	3	11.11%	2.00
SM Cafe Mocha	5.70	0.00	5.70	16.23%	3	11.11%	1.90
SM Latte	4.00	0.00	4.00	11.39%	2	7.41%	2.00
SM Coffee	3.99	0.00	3.99	11.36%	3	11.11%	1.33

1/2

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Report Mail Enhancements

Report Mail now supports sending Simphony Revenue Center, Employee, and Cashier Financial reports. The following Report Mail specific templates are used for e-mailing the aforementioned reports through the Report Mail feature in mymicros.net.

- MMRevCtrFin-ReportMail.xml
- MMCashierFin-ReportMail.xml
- MMEmpFin-ReportMail.xml

New options have been added to e-mail the reports by Revenue Center, by Employee ID, and by Cashier ID respectively. See the Information Portal System Administrator's Manual (http://downloads.micros.com/micros/eBusinessSolutions/MM_SysAdmin_UserGuide.pdf|Enterprise) for instructions on setting up Report Mail.

To define the reports in mymicros.net

Before creating Report Mail jobs for the financial reports, you must first define each of them in mymicros.net separately.

1. Sign in to mymicros.net with administrator rights.
2. Navigate to *Admin > Warehouse > Reports >* ***Portal Reports***.
3. Click **Add**.
4. Give the report a name, description, path and select **Custom** as the Report Category.
5. Click **Save**.
6. Navigate to *Admin > Warehouse > Reports >* ***Report Roles***.
7. Select a user and click **Select**.
8. Click **Add**.
9. Select the report that you created earlier and click **Save** to add the report to the selected user.

See Also

- List of PMC Reports
- PMC Reports
- Simphony 2.7

Report Parameters

Report Parameters is the EMC module that allows the configuration of option bits that are related to Reporting. This functionality was introduced in Simphony 2.0; in previous versions, the fields from this module were configured in Property Parameters. This module is zoneable; it can be configured at the Enterprise, in a Zone, or in a Property.

This article relates to programming of an EMC module.

This feature or functionality was introduced in Simphony 2.0.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 EMC Configuration
- 2 See also

EMC Configuration

The options in this module all relate to reports:

1 - Canadian GST
: Combine Rates 2 thru 8 on Property Tax Report: This option is active only if the Canadian Options are enabled for the Property, and Tax Rates 2 through 8 are in use. Select this option to combine Canadian Tax rates 2 through 8 into a single summary line on tax reports. Disable this option to print separate lines on the tax reports for each Canadian Tax Rate.

2 - Omit Summary Sections and Total Lines from Time Period Reports
: Select this option to omit summary sections and total lines from Time Period Reports. This feature is intended for use in the case of overlapping Time Periods, because overlapping Time Periods would result in double-posting of some totals, rendering useless report totals. Disable this option to print a summary section and total line for each Time Period.

3 - Include Time Check was First Printed in PMC Closed Check Report
: Select this option to print a line showing the time the first check was printed in the PMC version of the Employee Closed Check Report. If the first check was never printed, this line is omitted. Disable this option to omit this line.

4 - Include Time Check was First Printed in mymicros.net Closed Check Report
: Select this option to print a line showing the time the first check was printed in the mymicros.net version of the Closed Check Report. If the first check was never printed, this line is omitted. Disable this option to omit this line.

5 - Enable French VAT Reporting
: Select this option to use French VAT reporting. This option is active only in locations where the Tax Parameters option, **[ON = Apply Tax as Add-On; OFF = Apply Tax as VAT]**, is disabled.

6 - Do Not Print "Grand Total" and "Change in Grand Total Fields"
: Select this option to suppress the printing of the "Grand Total" and "Change In Grand Total" fields on Financial Reports. The Grand Total field appears on the Property Financial Report and the Revenue Center Financial Report. The Change In Grand Total field appears on the Property, Revenue Center, Employee Financial Report, and Serving Period Financial Reports. Disable this option to print these fields.

7 - Do Not Print the Table Section on Financial Reports

Select this option to suppress the printing of the Table profile on financial reports. The Table profile includes the number of tables and the Sales Average per table, the number of table turns and the Sales Average per turn, the average number of turns per table, the average Table Dining Time (in minutes), and the Average Turn Time (in minutes). Disable this option to print the Table section.

9 - Do Not Print the Order Type Breakdown on Financial Reports

Enable this option to suppress the printing of the Order Type section on Financial Reports. The Order Type section prints a line for each active Order Type that includes: Net Sales and Net Sales as a percentage of Total Sales, Number of Guests served and the Sales Average per guest, Number of Checks and the Sales Average per check. Disable this option to print the Order Type section.

10 - No Form Feeds Between Employees on Employee Reports, Except Financial

Select this option to prevent the printer from advancing to the top of a new page (generating a form feed) after printing a section for an individual employee on Employee and Operator reports. Disable this option to generate a form feed between individual employees. NOTE: This option does not apply to Financial Reports.

11 - Include Table ID in PMC Closed Check Reports

Select this option to include the Table ID on PMC Employee Closed Check Reports.

16 - Partial Cut Between Pages and Full Cut Between PMC Reports

This option is used only if an autocut printer is used to print PMC Reports. Enable this option to perforate the paper (partial cut) between pages within a report, and to make a full cut between reports. Disable this option to prevent the autocut printer from cutting pages within or between reports.

17 - Print Labor Totals on Job Code Labor Report for Property View

Select this option to print labor totals on Job Code Labor Reports that are taken for a Property. Disable this option to suppress the printing of these totals.

18 - Print Labor Totals on Job Code Labor Report for RVC View

Select this option to print labor totals on Job Code Labor Reports that are taken for a single Revenue Center. Disable this option to suppress the printing of these totals.

19 - Print Labor Totals on the Time Period Reports

Select this option to print labor totals on all Time Period Reports. Disable this option to suppress the printing of these totals.

Labor totals are printed in a block that includes the following information:

- Labor Cost
- Labor Hours
- Percentage of Labor Cost to Sales
- Cost per Labor-Hour
- Revenue per Labor-Hour

20 - Print Labor Totals on the Employee Labor Summary Reports

Select this option to print labor totals on all Employee Summary Reports. Disable this option to suppress the printing of these totals.

21 - Labor Reports Continue When Employee Open On System Found

Select this option to allow labor reports (and autosequences that include labor reports) to continue when an Employee Open on System condition is encountered. Disable this option to cause the report to terminate and generate an error prompt. An Employee Open on System condition may arise when a labor report tries to access a time card that is already in use elsewhere on the System. For example, an employee who is clocking in or out, taking time to respond to prompts (Job Code selection, Time Clock Schedule prompts, tips declaration, etc.) is open on the system. A time card being adjusted (through Manager Procedures) also creates an Employee Open on System.

22 - Suppress Employee Percentage of Total Sales

Select this option to suppress the employee's percentage of total sales on the Employee Financial report.

23 - Save the Final Check Image

When this option is enabled, an image of a check is stored when Guest Checks, Customer Receipts, or Memo Checks are created; these checks are then viewable from Audit and Analysis or from the PMC Journal Report. When this option is disabled, check image functionality is not supported.

See also

- Parameters

- Simphony 2.0

Revenue Center Group

Contents

- 1 Understanding revenue center groups
- 2 Configuring revenue center groups (Simphony 1.x)
  - 2.1 Property level
  - 2.2 Revenue center level
- 3 Using revenue center groups with discounts (Simphony 1.x)
- 4 Using revenue center groups with menu item availability (Simphony 2.x)

This article relates to programming of an EMC module.

Understanding revenue center groups

A revenue center group is a group of revenue center records within a property.

- In Simphony 1.4 and earlier, revenue center groups allow you to group similar revenue centers to have discounts active in some revenue centers but not others.
- In Simphony 2.0 and later, revenue center groups are used in conjunction with menu item availability.

Configuring revenue center groups (Simphony 1.x)

Property level

The Revenue Center Groups module is available from the Property Scope of EMC and contains the following configurable fields:

- **Name** - Enter a name for the revenue center group. Up to 64 characters are allowed.
- **Revenue Centers** - Select the revenue center(s) that belong to this group.

Revenue center level

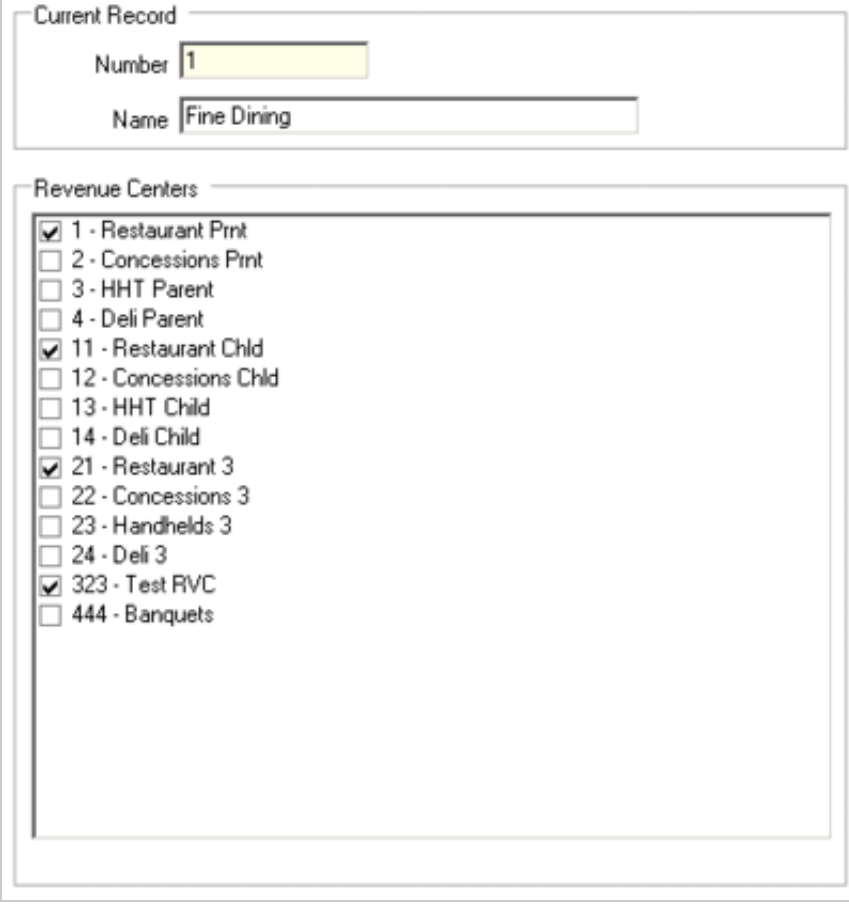
From the Revenue Center Groups module, you can determine which revenue centers belong to a group. You can also configure revenue center groups from the RVC Configuration module. From RVC Configuration, you can associate a single revenue center with multiple revenue center groups.

Depending on the situation, it may be easier to use RVC Configuration rather than the Revenue Center Groups Groups module. For instance, after you create a new revenue center, you can easily add the revenue center to multiple revenue center groups; this operation is more efficient than opening the Revenue Center Groups module, selecting each revenue center group, and then selecting the revenue center.

Using revenue center groups with discounts (Simphony 1.x)

In Simphony 2.x, this functionality was replaced with RVC Type within the Discounts module

Discounts can be associated with a revenue center group to determine the revenue centers in which the discount is active. For example, if the "50% Wine Promo" discount is associated with the RVC Group in the example image, this discount cannot be used in the Concessions Parent revenue center.



Form View for the Revenue Center Group module. This image shows that the Fine Dining RVC Group contains four revenue centers.

Using revenue center groups with menu item availability (Simphony 2.x)

See also, Menu Item Availability

Starting with Simphony 2.0, revenue center group are used with menu item availability. In essence, a revenue center group can be considered a "kitchen" that is used by multiple revenue centers. For example, if a large casino has 100 revenue centers, it is likely that a number of revenue centers share the same kitchen. Consider the following:

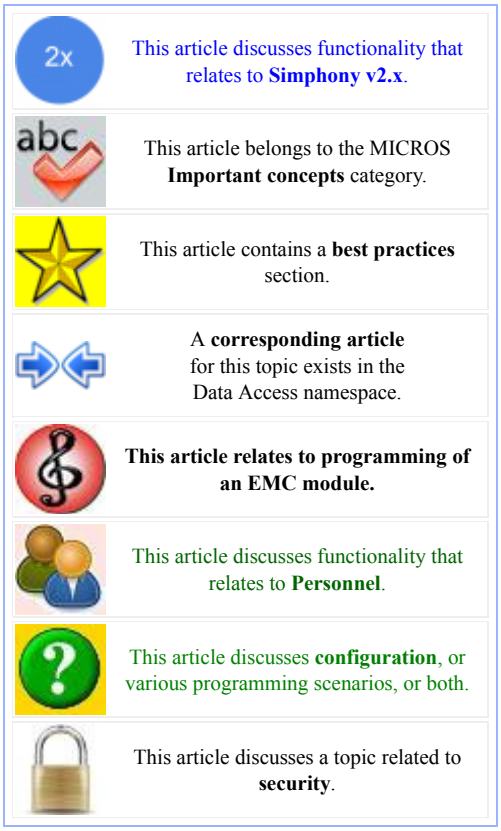
- The Room Service and Deli revenue centers share a kitchen.
- The special for the day is Lobster Tail.

With this scenario, the site wants the number of Lobster Tails available to decrement each time one is ordered. Because both revenue centers decrement the same Lobster Tail count, a revenue center group is configured for these two revenue centers. Then in the Menu Item Availability module, a count can be assigned for the number of Lobster Tails that are available for the revenue center group.

Role (Simphony 2.0)

A **Role** is a group of privilege options defining what an employee can do. Employee Roles determine the EMC modules a user may access, and they also determine what types of transaction behavior an operator has (permission to do voids or open the cash drawer, for example).

A single Role may be configured for all locations in the enterprise, or a role may be active in selected locations (Zone/Property/RVC). In addition, multiple Roles may be assigned to a single employee, making the configuration of roles a task-based procedure (a role may include permissions that only allow a user to "edit menu items", for example; see more in the best practices section). Also, job codes may be associated with employee roles, restricting clocked-in employees to a single set of permissions for the duration of a shift.



Contents

- 1 EMC Configuration
  - 1.1 General Tab
  - 1.2 EMC Modules Tab
  - 1.3 Actions Tab
  - 1.4 Operations Tab
  - 1.5 Visibility Tab
  - 1.6 View Tab
- 2 Determining Employee Access
  - 2.1 Job Code Overrides
- 3 Best Practices
  - 3.1 Operational Roles
  - 3.2 EMC Roles
- 4 Other Considerations

EMC Configuration

The **Roles** module is opened from the Enterprise Scope of EMC.

General Tab

Only three configurable fields exist on the General Tab:

- Name - Enter the name of the Role. Up to 64 characters are allowed.
- Comment - Enter a comment describing this role. Up to 2000 characters are allowed; this field is not translatable.

- Level - This field is a level of security; it was created to prevent EMC users from creating Employee Records more powerful than themselves. See Employee Level: Employee Levels and Roles for more information.

EMC Modules Tab

From the EMC Modules tab, roles are configured to allow access to various modules of the EMC. From this tab, a user may be given permissions to:

- View a module (open it)
- Edit a module (to update fields or records within the module)
- Add records
- Delete records
- Add overrides to records.

Right-click row or column header for bulk operations. Help

File	View	Edit	Add	Delete
Global Access				
All Property Modules	☐	☐	☐	☐
Property Modules				
Property Parameters	☐	☐		
Install User Security	☐	☐		
Property Descriptors	☐	☐		
Currency	☐	☐		
Property Merchant Groups	☐	☐		
Help Screens	☐	☐	☐	☐
RVC Configuration	☐	☐	☐	☐
Revenue Center Groups	☐	☐	☐	☐
Sales Modules				
Tax Table	☐	☐		
Tax Classes	☐	☐	☐	☐
Tender/Media	☐	☐	☐	☐
Discounts	☐	☐	☐	☐
Service Charges	☐	☐	☐	☐
Revenue Center Modules				
RVC Parameters	☐	☐		
RVC Descriptors	☐	☐		
Tables Module	☐	☐	☐	☐
Serving Periods	☐	☐	☐	☐
Time Periods	☐	☐	☐	☐
Macros	☐	☐	☐	☐
Stored Value Cards	☐	☐	☐	☐
Order Devices	☐	☐		
Price Tier Assignment	☐	☐		
Till Templates	☐	☐	☐	☐
Hardware				
Workstations	☐	☐	☐	☐
Printers	☐	☐	☐	☐
Barcode Format Sets	☐	☐	☐	☐

The EMC Modules tab of the Roles module. This tab determines a user's access to specific modules.

Note: *A user must be given "View" access to a module to open it. If a user is programmed with ability to Edit, Add, and Delete a module, but not to view it, the user will not be able to open the module. When an employee does not have access to View a module, the module will display "grayed out" on the EMC EMC home page.*

In some modules, such as RVC Parameters or Order Devices, there is not an "Add" or "Delete" option because individual records cannot be added or deleted. In addition, "Add Overrides" is available only for zoneable modules. Further, note that "Add Overrides" also controls the ability to delete an override in Single-Record modules.

Global Access

The All Access checkbox is available so that a role may be easily configured to View, Edit, Add, or Delete every module without having to individually check each box. Further, this checkbox allows access to new modules that will be created in the future. For instance, if a new module "voice ordering" is created and released in a new

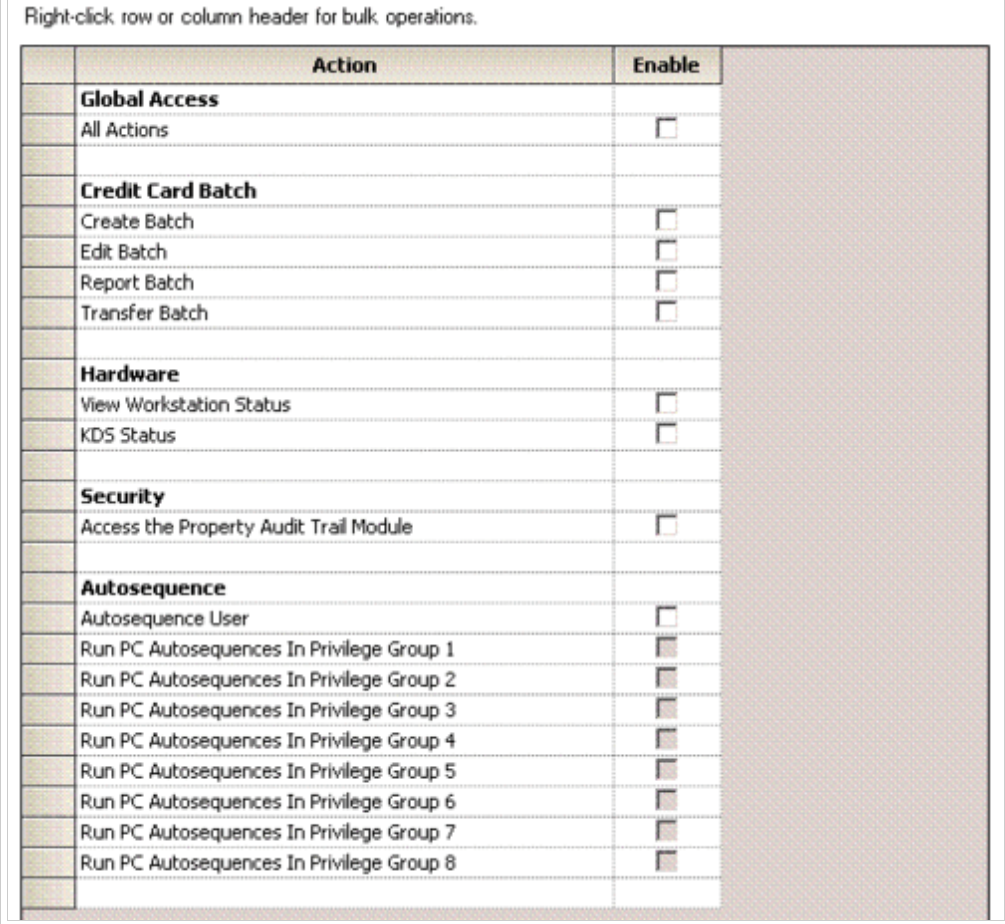
version, an employee with "Global Access" for "View" will be able to access this module without having a specific checkbox for the "voice ordering" module. MICROS recommends that administrator-type roles have the "All Access" option checked, so that administrators will always be able to access every module in the system.

Actions Tab

From the Actions tab, roles are given access to specific actions that can be performed in EMC. Note that all the "Run PC Autosequences in Privilege Group X" checkboxes are disabled unless the "Autosequence User" field is enabled first.

All Actions

Similar to the "All Access" checkbox on the EMC Modules Tab, this checkbox gives users associated with this role permissions to perform all actions. MICROS recommends that administrator-type roles have this option checked, so that administrators will always be able to perform all types of actions, including future actions that are not currently in the system.



The Actions tab of the Roles module. This tab determines what types of actions a user may perform.

Operations Tab

The operations tab contains all option bits related to workstation functionality. The operations tab itself is broken down into sub-tabs based on similar functionality: Timekeeping, Voids, PMC, etc. There are over 200 operational bits so it could be difficult to find an option by searching on the various tabs. To quickly find options, use the Search tab to perform a text comparison. The example image shows a search for discount option bits.

Visibility Tab

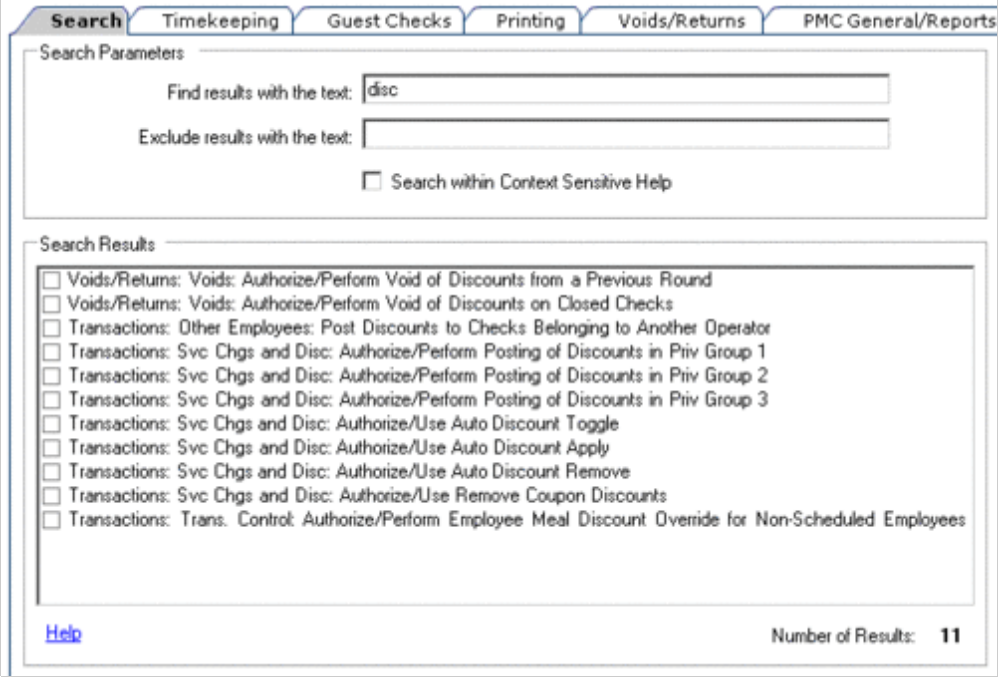
On the properties tab, the Role is assigned to specific locations or assigned to the Enterprise. In many situations, a Role will be assigned to the Enterprise — it is likely that a "Server" or "Bartender" role is the same for all properties. This tab consists of a grid that allows the programmer to add/delete locations, and to set the checkbox, **[Propagate to Children]**, for each location. The checkbox allows a Role to be visible in the selected

Zones/Locations and all its children; if it is unchecked, the Role will be visible in the selected Zone/Location only, but not its children.

View Tab

The view tab contains one option bit:

Enable Revenue Center-Level Security
: This option relates to workstation behavior only. Employees associated with a Role that has this option checked will only be able to perform operations in Revenue Centers in which they are an operator.



The Operations Tab in Roles is split into several other tabs. The Search Tab allows users to quickly find option bits. In the example, typing "disc" allows the user to quickly find discount-related options.

Determining Employee Access

Multiple roles can be assigned to a single employee. If this is the case, how is it determined that an employee has a specific privilege? Quite simply, an employee has a privilege if *any one of his roles* contains the appropriate privilege. Consider an employee with the following employee roles:

- Role 1 (cannot perform voids)
- Role 2 (cannot perform voids)
- Role 3 (can perform voids)

In the example shown, we are trying to determine the user's ability to do voids in Property A. Our example assumes that Role 1, Role 2, and Role 3 are all available in Property A.

This employee may indeed perform voids, because at least one Role has the appropriate privilege. When discussing employees and roles, the sentence is usually written like this: *an operator has access to (some privilege) only when associated with an Employee Role with...*. Because employee's don't *belong* to employee roles, it is necessary to make the distinction that an employee is simply associated with one or more roles; the employee does not belong to a role.

Job Code Overrides

When a job code is configured to be linked to an employee role, employees who are clocked in to that job code will inherit the permissions of the job code for the duration of the shift. This situation is ideal when two job codes exist: Server and Floor Manager. By linking both of these to appropriate Roles, a user who is clocked-in as a Floor Manager will have privileges to perform voids, but when that same user is clocked-in as a server, he will not. To summarize, there are two methods for programming Job Codes:

- The Role field is set to 0-None, the operator will have privileges based on the role(s) assigned in the EMC.
- The Role field is not 0-None, the operator's privileges from EMC do not apply. Only the privileges associated with the role from this field will be active for the duration of the Clock-In Cycle.

Programming Job Code Overrides

For companies that use Simphony's timekeeping features and require all hourly employees to clock in, the following configuration provides optimal security with the least amount of programming:

- Program an Employee Role that allows users to clock in. This role could be named "Ability to Clock In", and it would be programmed with the following options enabled:
  - Clock in at Rate 1 (through 8, as appropriate)
  - Clock in at Rates 9-255 (if appropriate)
- Every employee in the enterprise who clocks in should be associated with the "Ability to Clock In" role and *no other roles.*
- Every job code is linked to an Employee Role. Some examples:
  - A "bartender" job code will be associated with a role (probably also called "bartender") that allows ability to open cash drawers and perform fast transactions.
  - A "server" job code will be associated with a role that allows ability to begin tables.
  - An "hourly manager" job code will be associated with a role that allows ability to perform voids and other authorizations.
- Other employees (those who are on salary) do not clock in. These employees will have one or more employee roles assigned within EMC.

Best Practices

In general, there are two types of Employee Roles:

1. Roles relating to workstation operations
2. Roles relating to EMC access and security

When considering Role programming, one must consider the type of role being programmed.

Operational Roles

For operational Roles, the general case is that an employee is only associated with one single role. For example, John, Joe, and Mary are all bartenders, so they should all have the same privileges; only one role needs to be created. This role will include all bits and privileges necessary for bartenders to perform workstation operations. ***Note:*** *In an enterprise environment, ideal programming is that a single role, "Bartender", exists for all properties in the enterprise, causing bartenders in every property to have the same permissions.*

EMC Roles

For EMC-related roles, ideal programming is not done by the job title, but rather by the task being performed. For instance, the following EMC-related roles might be found in a well-programmed database:

The role names in this example all begin with "EMC". While not necessary, this method of programming may help users to

- EMC All Module Access
- EMC Add and Edit Menu Items
- EMC Delete Menu Items
- EMC Add Employees
- EMC Edit Employees
- EMC Delete Employees
- EMC Add/Edit/Delete Menu Item Class
- EMC All Access to Hardware Modules

immediately realize that the roles relate to EMC functionality.

With these roles programmed, employees can be assigned roles based on the types of tasks they perform and/or the confidence level of an EMC Administrator (the person who assigns roles to users) in the person who will be given a role. A floor manager for a single Revenue Center may have only the "EMC Add and Edit Menu Items" role enabled; someone from accounting may be associated with "EMC Add Employees" and "EMC Edit Employees"; an employee who maintains the hardware on site may be associated with the "EMC All Access to Hardware Modules". As the floor manager becomes more confident and comfortable with EMC programming, perhaps the administrator will assign the "EMC Add/Edit/Delete Menu Item Class" role for that user.

Programming EMC Roles in this manner will allow the most flexibility in the system. Note that the first role, "EMC All Module Access" should exist in every database; an administrator should always be able to access every module. Also, each of the roles (except the "EMC All Module Access" role) should probably be programmed with the "Enable Property-Level Security" and "Enable Revenue Center-Level Security" options enabled, to prevent users from viewing information outside the properties or revenue centers where they work.

Other Considerations

If the logged-in user makes changes to a Role that is assigned to him- or herself, these changes will not be reflected until the Employee disconnects the EMC session (File > Disconnect) and reconnects.

RVC Configuration

RVC Configuration is the EMC module where Revenue Centers are added, modified, distributed and deleted.

A **corresponding article** for this topic exists in the Data Access namespace.

This article relates to programming of an EMC module.

Contents

- 1 Overview of Configurable Fields
  - 1.1 Table View
  - 1.2 Form View
- 2 Adding RVCs
- 3 Distributing RVCs
  - 3.1 Menu Item Files
  - 3.2 Child RVCs
- 4 Deleting RVCs
  - 4.1 Prerequisites
  - 4.2 Errors
  - 4.3 Audit Trail
- 5 Security Considerations

Overview of Configurable Fields

The **RVC Configuration** module is accessed from the Property Scope of EMC. Because of the type of data being displayed, some fields appear in Table View but not in Form View, and vice versa. The following fields are available in both Table View and Form View:

Name
: Enter a name that describes the RVC. Up to 16 characters are allowed.

RVC ID
: This field displays the Revenue Center ID of this RVC. The ID is the database ID, and it is not editable. This field is provided for troubleshooting purposes when log messages (etc.) reference the Revenue Center ID instead of the object number. Additionally, this field may be used in the configuration of some interfaces or other third-party applications.

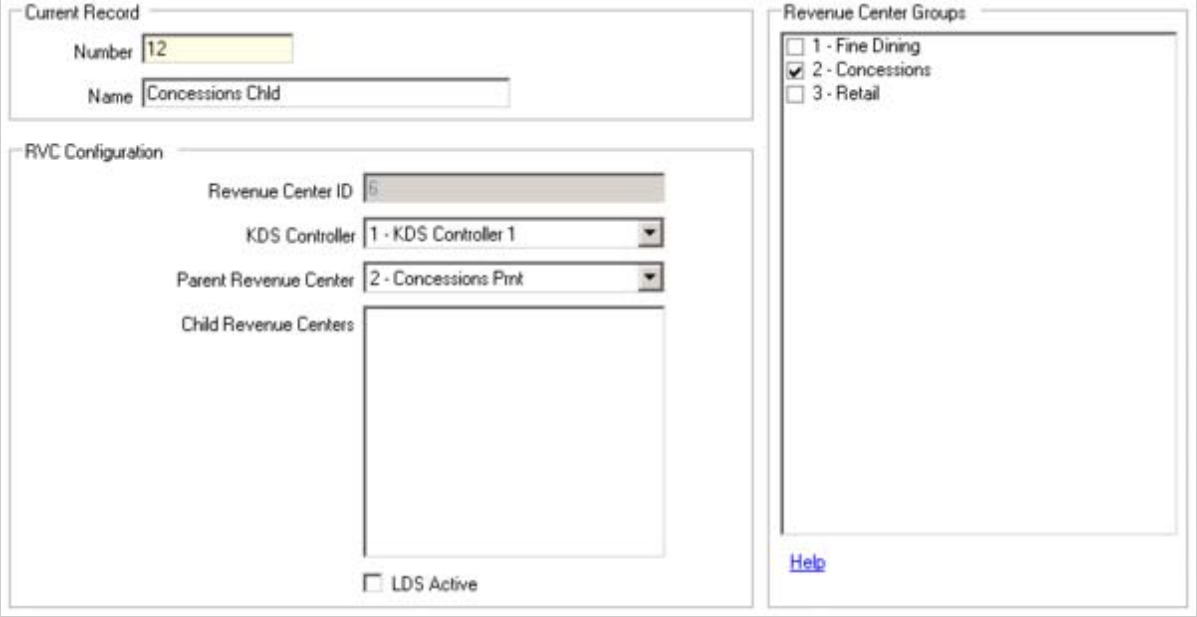
ILDS Active
: Check this box to enable ILDS for the selected RVC.

Parent
: This field is displayed in displayed in Table View, but it is only configurable in Form View. (This was done to prevent users from using F3 and F4 on this field.) Select a Revenue Center that will be the Parent Revenue Center of this RVC, if Shared Revenue Centers are in use.

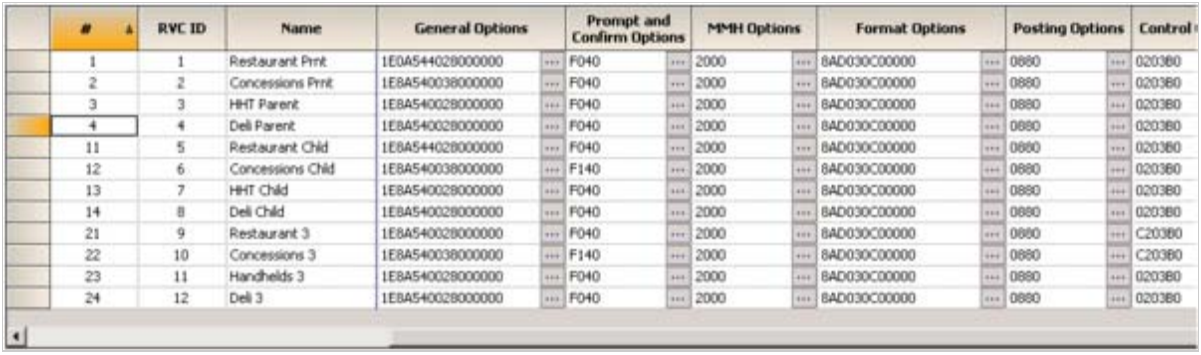
KDS Controller
: Select the KDS Controller, if any, that will control the KDS Display Order Devices in this RVC. The same KDS Controller may control Order Devices in multiple RVCs, but MICROS recommends using no more than 15 KDS Display Order Devices on a single KDS Controller.

Table View

In table view, each RVC record displays option bits from the Revenue Center Parameters module. These bits are displayed so that a user can use the Option Bit Comparison Dialog to compare option bit settings for RVCs in the same property.



Form View from the RVC Configuration module.



#	RVC ID	Name	General Options	Prompt and Confirm Options	MMH Options	Format Options	Posting Options	Control
1	1	Restaurant Print	1E0A544028000000	F040	2000	8AD030C00000	0880	0203B0
2	2	Concessions Print	1E8A540038000000	F040	2000	8AD030C00000	0880	0203B0
3	3	HHT Parent	1E8A540028000000	F040	2000	8AD030C00000	0880	0203B0
4	4	Deli Parent	1E8A540028000000	F040	2000	8AD030C00000	0880	0203B0
11	5	Restaurant Child	1E8A544028000000	F040	2000	8AD030C00000	0880	0203B0
12	6	Concessions Child	1E8A540038000000	F140	2000	8AD030C00000	0880	0203B0
13	7	HHT Child	1E8A540028000000	F040	2000	8AD030C00000	0880	0203B0
14	8	Deli Child	1E8A540028000000	F040	2000	8AD030C00000	0880	0203B0
21	9	Restaurant 3	1E8A540028000000	F040	2000	8AD030C00000	0880	C203B0
22	10	Concessions 3	1E8A540038000000	F140	2000	8AD030C00000	0880	C203B0
23	11	Handhelds 3	1E8A540028000000	F040	2000	8AD030C00000	0880	0203B0
24	12	Deli 3	1E8A540028000000	F040	2000	8AD030C00000	0880	0203B0

Table View from the RVC Configuration module. Option bits from RVC Parameters are available in this view so users can compare options with the Option Bit Comparison Dialog.

Note that when changes are made to these columns, Audit Trail will record the changes as RVC Parameter modifications.

Form View

In form view (displayed above), the Revenue Center Groups box lists all the RVC Groups in the property. If an RVC Group is checked, the current RVC is a member of that group. Thus a user can mark an RVC as a member of an RVC Group (from this view) and also add RVCs to RVC Groups (from the RVC Groups module).

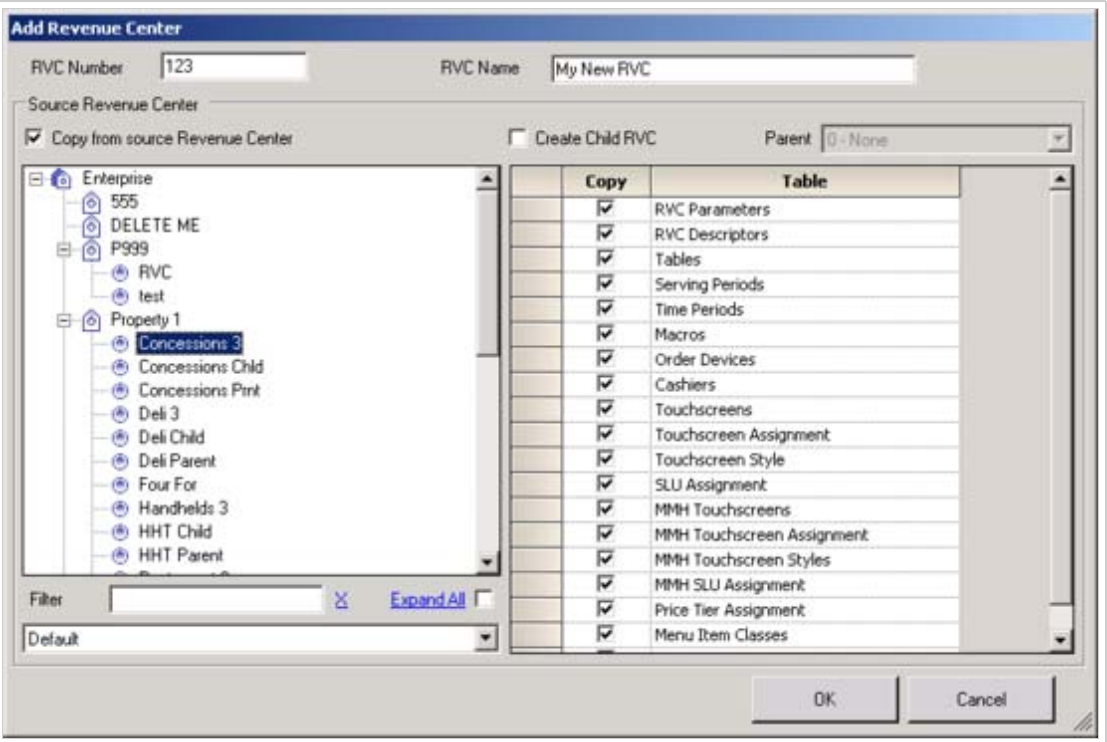
Note that when changes are made to the RVC Groups selections, Audit Trail will record the changes as RVC Group modifications.

Adding RVCs

When the Insert button is pressed in the RVC Configuration module, the standard insert dialog is not displayed. Instead, the user sees a special dialog for adding RVCs. In his dialog, the following can be configured:

RVC Number
: In this field, enter the Object Number for the RVC. This field allows a range of 1-999.

RVC Name
: Enter the name of the RVC. Note that this dialog does not allow name translations. To translate the RVC's name, create the RVC first and then edit the name.



The Add dialog in the RVC Configuration module of EMC.

Source Revenue Center
: In this box, a user can choose to create the new RVC by copying data from an existing RVC. To create a RVC based on a template, check the "Copy from source Revenue Center" box, select a Revenue Center from the Selection Hierarchy panel, and select the module(s) to be copied from the source RVC. In addition to these fields, it is possible to create a Child Revenue Center by checking the "Create Child RVC" box and selecting the Parent RVC.

Distributing RVCs

Like other records, RVCs may be Distributed. Unlike other records, when the distribute button is used from the RVC Configuration module, a special distribute dialog displays. This dialog allows a user to distribute one or more of the RVC-scope files to another RVC. Note that this dialog will assume that the distribution options "overwrite records if they exist" and "create records if they don't exist" are enabled. To distribute:

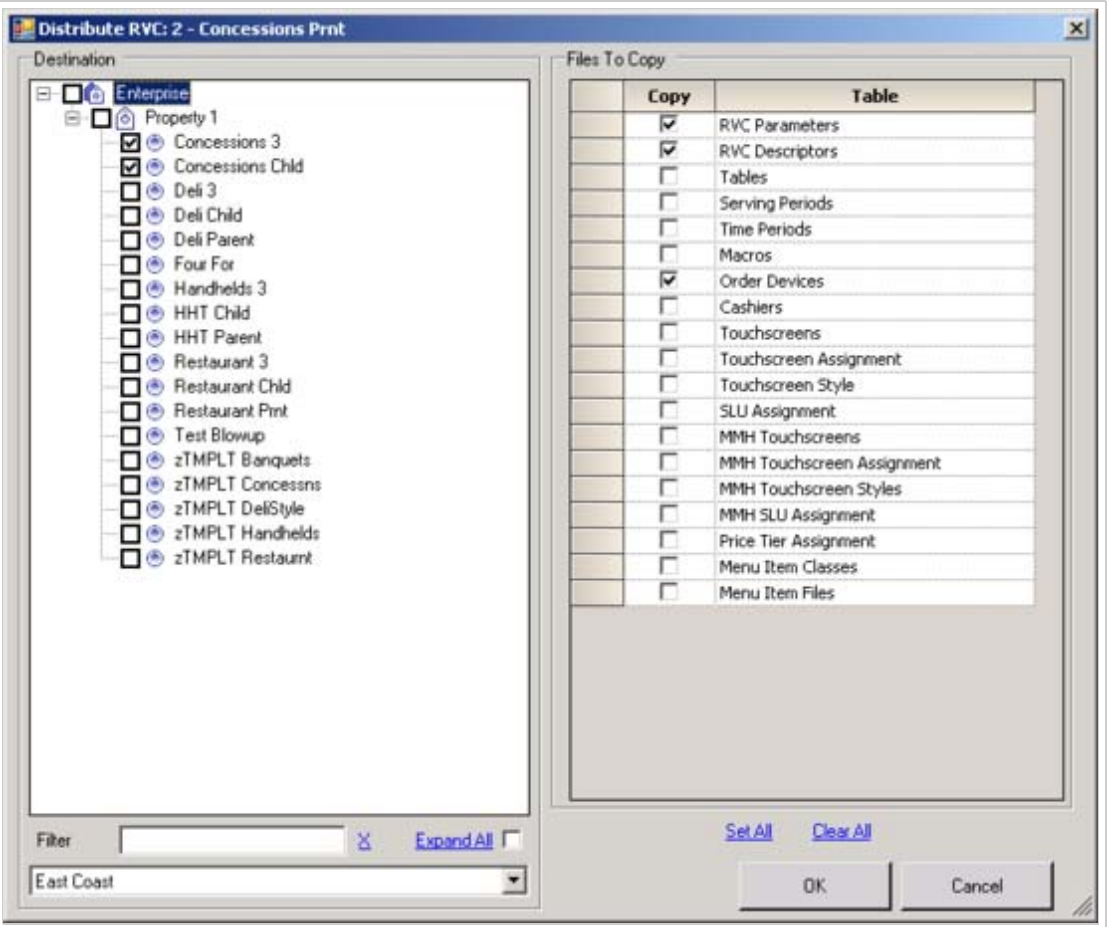
1. Select a Revenue Center and press the Distribute icon. The distribution dialog will display the text **Distribute RVC: # - Name**, where `# - Name` represents the Number and Name of the RVC being distributed.
2. From the Selection Hierarchy panel choose the RVC or RVCs to receive the new records.
3. Select the files that will be copied.

Menu Item Files

The last module that is listed is "Menu Item Files". By checking this, all definitions and prices will be copied from one RVC to the others. Note that the distribution of Menu Items assumes that all these Menu Item Distribution options are enabled:

- Overwrite records if they exist

- Create records if they don't exist
- Distribute prices with definitions
- Create master records for definitions
- Create menu item classes that do not exist



The Distribute dialog in the RVC Configuration module. This image shows selected modules from "Concessions Parent" being distributed to both "Concessions Child" and "Concessions 3".

Note: *For detailed information on functionality of these options, see Menu Item Distribution.*

Because all these options are enabled, distributing Menu Item Files with the RVC Distribution Dialog may not be the best option in all situations. Typically, this should only be checked the destination RVC(s) are exact clones of the source RVC, and usually within the same property.

Child RVCs

When distributing RVCs, there are some considerations for Child RVCs:

Child RVC as the Source

When a Child RVC is being used as the source RVC, the "Files to Copy" grid will disable shared modules to prevent them from being distributed. The following modules will be disabled:

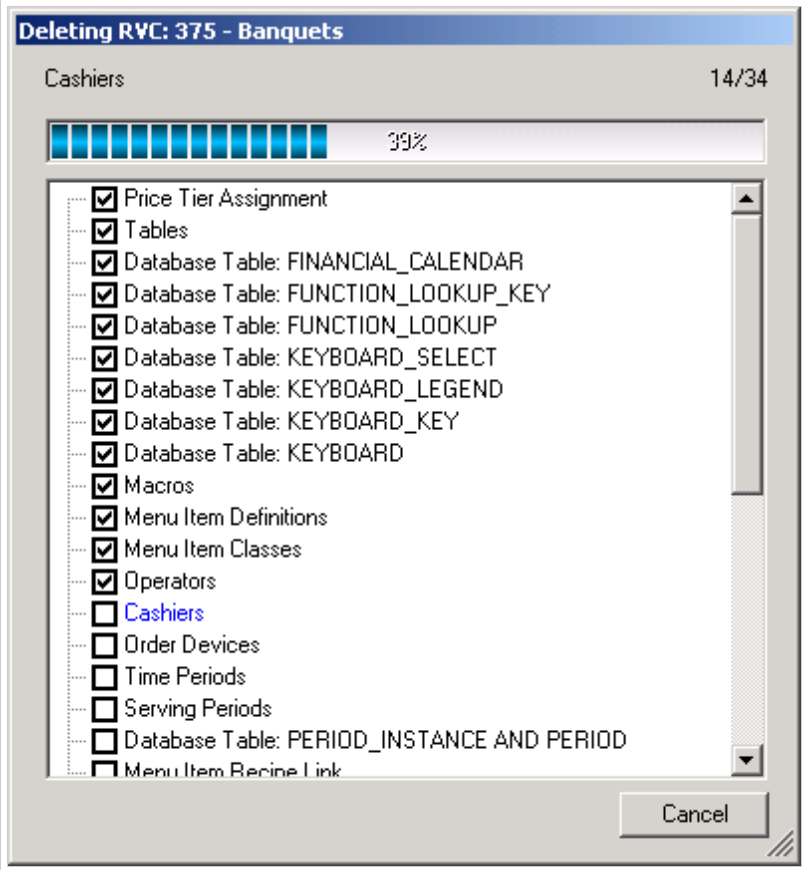
- Touchscreens
- Touchscreen Assignment
- Touchscreen Style
- SLU Assignment
- MMH Touchscreens
- MMH Touchscreen Assignment
- MMH SLU Assignment
- Menu Item Classes
- Menu Item Files

Child RVC as a Destination

When a child RVC is used as one of the destination RVCs, EMC will ignore attempts to distribute shared modules (those listed above) into Child RVCs.

Deleting RVCs

Deleting a Revenue Center record is similar to deleting other records, however a progress dialog displays all the RVC-scope records and database tables to be deleted. A user may press Cancel at any time to abort the deletion of the Revenue Center. If Cancel is pressed, records that have already been deleted (items already checked) cannot be retrieved.



The progress dialog when deleting a Revenue Center.

Prerequisites

EMC prevents users from deleting RVCs that meet any of these conditions:

- The RVC has Child Revenue Centers.
- One or more Job Codes are linked to the RVC.
- The RVC is the "Current Revenue Center" for at least one Property Employee Record.
- One or more Workstations use the RVC as the current RVC.
- Another RVC uses this RVC as an Add/Transfer Check RVC.
- One or more Workstation Autosequences use the RVC for the reporting RVC.
- At least one transaction has been rung in the RVC (it is necessary to clear totals before deleting the RVC).

If one of these error conditions is encountered, EMC displays a relevant message to the user so that the offending records can easily be found and changed. In addition, EMC will prevent RVCs from being deleted if any EMC modules are open for the RVC.

Errors

If the RVC deletion operation fails, it is possible that a Revenue Center can be in a "partially deleted" state. In this state, a Revenue Center is missing important information from the database, such as Revenue Center Parameters information. "Partially deleted" RVCs are highlighted in red in Table View. From this state, a user cannot update the RVC; it can only be deleted.

Audit Trail

When a Revenue Center is deleted, Audit Trail logs two times. The first entry is before the deletion has occurred; the text "RVC 123, Delete Start" will be displayed. When the deletion is complete, another Audit Trail entry will be created: "RVC 123, Delete Complete".

Security Considerations

- When this module opens, the user will see all RVCs to which he has access, based on Employee Role Revenue Center Level Security settings.
- A user can add RVCs only when none of the user's Roles has the Enable Revenue Center-Level Security option enabled.
- Typically, very few EMC users are given access to the RVC configuration module. Ideally, only enterprise administrators and other high-level users should be able to make changes to Revenue Centers.

RVC Descriptors

For the Simphony 2.0 descriptors modules, see Descriptors

Revenue Center Descriptors is an EMC module where a programmer sets the appearance of various text fields that are used by workstations and in EMC.

This feature or functionality was deprecated in Simphony 2.0.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 General Tab
- 2 Menu Levels Tab
- 3 Group Names Tab
- 4 Printing Tab

General Tab

- Text displays for the Check Summary Area
  - Subtotal
  - Tax
  - Other
  - Payment
  - Total Due
  - Change Due
- Seat Descriptors
- Guest Information Lines
- Time Clock Adjustment Reason Codes
- Check Endorsement Lines

Menu Levels Tab

- Main- and Sub- Menu Level names; and prefixes and suffixes

Group Names Tab

- Condiment Group Names
- Sales Itemizer Names
- Menu Item SLU Names
- Menu Item NLU Names
- Menu Item Course Names

Printing Tab

- Guest Check Headers and Trailers
- Customer Receipt Header
- Credit Card Voucher Header and Trailer
- Training Check Header
- Foreign Tax Header/Trailer

RVC Parameters

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

Revenue Center Parameters, sometimes shortened to **RVC Parameters** or **RVC Parms**, is one of the most-programmed modules in EMC. In this module, there are many option bits that allow and control various behaviors for a Revenue Center. It is largely because of this module that the system is so flexible. Sometimes, settings in this module are overridden by settings in other modules, and sometimes the settings in this module override settings from other modules. A user's best bet is to use the Context Sensitive Help that is provided for the option bits to determine if there are overriding factors. This article summarizes the tabs that are available within the Revenue Center Parameters module and how some options interact with the rest of the system.

Contents

- 1 General Tab
- 2 Search Tab
- 3 Options Tab
- 4 Format Tab
- 5 Posting and Control
- 6 Order Types
- 7 Menu Levels
- 8 Interfaces
- 9 Taxes
- 10 Autofire
- 11 CA/EDC
- 12 Calendar

General Tab

- Automatic Service Charge settings
- Add/Transfer Revenue Center settings
  - Select up to eight RVCs. A user can transfer checks from any RVC listed here.
- The current Serving Period that is active for the RVC

Search Tab

- The **Search Tab** allows a text search for option bits in Checked List Boxes from each of the other tabs. Options can be set from this tab or from the tab where the bit originates; the boxes refresh when switching from one tab to the next.

Options Tab

- Many option bits are on this tab.

Format Tab

- Options on this tab dictate how items appear on checks and receipts, etc.
- Option #36: **Allow Tender/Media to Print 2 Guest Checks and Receipts**; if this option is disabled, only one check/receipt will print, even though the Tender/Media record is configured to print two.

Posting and Control

- Items related to totals posting and security are on this page

Order Types

- On this page, configure the default Order Type for the RVC, and configure some options.
    - For each Order Type, configure the taxes that are active.

Menu Levels

- Configure the Transaction Default Menu Levels
- Configure the Auto Menu Levels

Interfaces

- Configure which Interfaces configured in the system are active for this RVC
- Configure options relating to TMS. This may be necessary for Guest Connection sites.

Taxes

- A few tax options are configured here; this page is used more by the international markets.

Autofire

- The Autofire options and settings are configured here.

CA/EDC

- On this tab, configure options relating to Credit Cards

Calendar

- This tab is used to override the Start of Day settings configured for the system. See Start of Day (RVC SOD) for more information.
- This tab also includes two options about Incrementing Shifts, which function independently of the override setting(s)

Sales Price Discount

Contents

- 1 Understanding sales price discounts
- 2 Configuring sales price discounts
  - 2.1 Configuring discount interaction (exclusivity)
- 3 Using sales price discounts
- 4 See also

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Understanding sales price discounts

A sales price discount is a type of automatic discount or automatic coupon discount that changes the price of a menu item to a different price. This type of discount is used in scenarios such as *All Beers are 2.00 on Thursday*.

Configuring sales price discounts

Sales price discounts are similar to item price substitution discounts, but they are easier to configure. Item price substitution discounts include Priority, Max Count, and Minimum Quantity fields, which are not available for sales price discounts. When using sales price discounts, the Trigger Menu Item Group is also the Award Menu Item Group (see Discount). In the example shown, "All Beer" is the Trigger Menu Item Group. In this configuration, each beer is ordered at $2.00.

The Auto tab for sales price discounts.

1. Navigate to *EMC > Enterprise / Property / Zone > Configuration > Discounts > Auto*.
2. Select **[5 - Sales Price]** from the drop-down list.
3. Enter information in the following fields:

Field	Description
Use Price in MI Group Detail	Select this option to use the promotion price that appears in the Menu Item Groups module for the discounted menu item. When you select this option, the textboxes next to Percent Off, Amount Off, and Amount Substitution are dimmed even after their respective radio buttons are selected.
Trigger MI Group	Select the menu item group to trigger the discount award.
Percent Off	Select this option to enter the percent discount that will apply to each item in this menu item group. This type of discount is used when all menu items of a menu item group are to receive a percent discount, such as *all beers are 50% off*.
Amount Off	Select this option to enter the amount discount that will apply to each item in this menu item group. This type of discount is used when all menu items of a menu item group are to receive an amount discount, such as *all appetizers are $5.00 off*.
Amount Substitution	Select the price that will be charged for each item in this menu item group. This type of discount is used when all menu items of a menu item group are to be charged a fixed price, such as *all desserts are $4.00*.

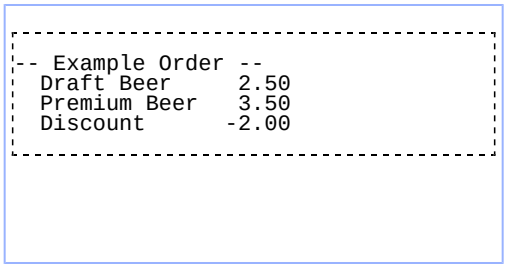
Configuring discount interaction (exclusivity)

For information about configuring a discount to interact with other discounts, see Discount Exclusivity.

Using sales price discounts

When using sales price discounts, each item in the Menu Item Group is discounted. In the example shown, each beer is discounted to $2.00.

Sales price discounts appear on customer receipts based on the configuration of the Item Discount option.



See also

Discounts	Discount · Manual Discount · Automatic Discount · Automatic Coupon Discount · Automatic Discounts for Decimal Quantity Menu Items · Combination Pricing Discount · Item Price Substitution Discount · Quantity Threshold Discount · **Sales Price Discount** · Total Price Threshold Discount · Discount Engine · Discount Exclusivity · Discount NLU · Menu Item Group · Revenue Center Group

Learning series: Discounts	

Secondary Printing

This article or section discusses a feature or functionality that has not yet been implemented. The documentation on this page is likely to change.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

Secondary Printing is a feature that allows menu items to print to additional order devices as secondary items. In short, a secondary item is just the item printing in a smaller font, allowing the preparer to know what goes with the items, but since they are smaller (and at the bottom of the chit) the preparer knows he/she doesn't have to prepare them.

Contents

- 1 Example Chit
- 2 Enabling
  - 2.1 Optional Secondary Printing Option Bits
- 3 Another Image
- 4 Other Considerations
- 5 Other Usage Examples
  - 5.1 Example 1
  - 5.2 Example 2
- 6 See also

Example Chit

This is a typical example of what a Hot-Line cook would see when Secondary Printing is enabled. The items "Pizza Dip" and "Chix Wings" are programmed to print to the Hot Printer, and the items "House Salad" and "Mesculin Mix" are programmed to print to the Cold Printer.

Enabling Secondary Printing, the cook reading the Hot Printer sees the items necessary for preparation at the hot line, and also any items that other cooks are making that were rung in at the same time. This allows orders to be synchronized for delivery.

Consider the opposite example, where the Cold Line cook sees "House Salad" and "Mesculin Mix" as the regular items with "Pizza Dip" and "Chix Wings" as the secondary items. If the cook who prepares the salads does not know

This is an example of an order chit that contains secondary printing.

that the Chicken Wings and Pizza Dip go with the salad order, the salads might be prepared right away. This may cause the salad to get warm or wilt, possibly having to be remade.

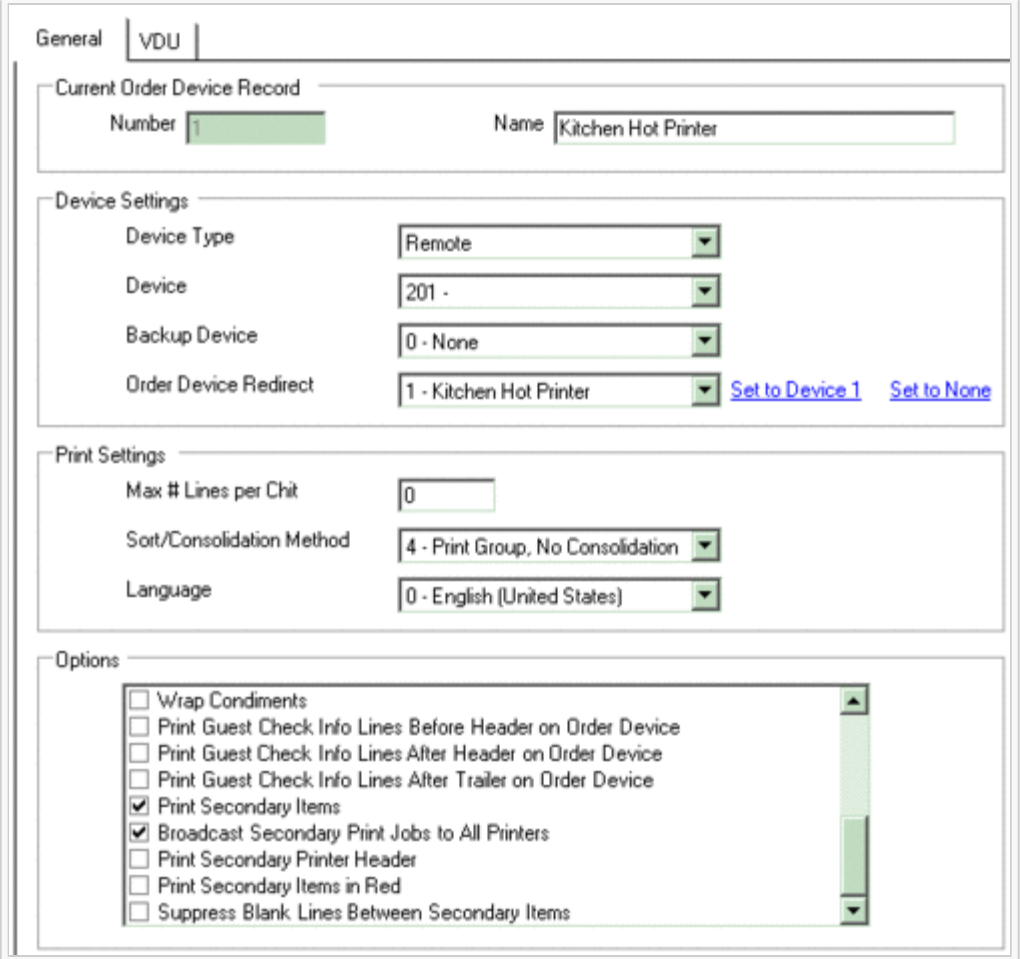
Enabling

Five option bits in the Order Devices module determine if Secondary Printing is enabled, and what other options should apply.

- **Print Secondary Items** – this option allows this order device to print Secondary Items that are being Broadcast from other order devices
- **Broadcast Secondary Print Jobs to All Printers** – this option tells this order device to broadcast its items to all other printers. Any printer with "Print Secondary Items" enabled will print the items.

Optional Secondary Printing Option Bits

- **Print Secondary Printer Header** – a popular option bit, this puts text on the printer that



The Order Devices module is where Secondary Printing bits are enabled.

indicates the printer where the item is being made (see "another image" example on this page)

- **Print Secondary Items in Red** – prints all Secondary Items in red.
- **Suppress Blank Lines Between Secondary Items** – this option bit saves paper by not skipping blank lines for the Secondary Items. In our example images, if this option bit is enabled, there will be no blank line before “Mesculin Mix.”

Another Image

This image shows an example of “Print Secondary Printer Header” being enabled.

Other Considerations

- **Sorting** - The items will sort based on the settings of the Order Device. So, if Order Device #1 is enabled sort by Print Group, it will print all secondary items sorted by print group also. (It does not matter that Order Device #2 was set to sort in some other method.)
- **Seat Numbers** - Items again use the settings of the Order Device.
- **Items going to multiple Order Devices** - The system is set up to be “smart” and to not print to multiple Order Devices.
  - In our example, if Chicken Wings is also programmed to print to the Cold Printer, it will not show as a Secondary Item on this printer, because it is a primary item.
  - If the item Mesculin Mix is programmed to also print to the Expo printer, it will not show in the Secondary Items list twice. It will only show for the first printer where it is programmed to print.
- **Disabled Printers** - Printers that are disabled (either on the workstation or Order Device) to not receive secondary print jobs.
- **Order Device Redirects** - An Order Device that is Redirected to 0-No Output will still broadcast its secondary print jobs, however it will not receive them. An order device that has been redirected to another printer will still print all primary and secondary print jobs.
- **No other items** - If a server rings in just one order of Chicken Wings, no other printers receive any items. The Hot Printer sees “Chix Wings” and that’s it.

Other Usage Examples

More examples of real-world usage for Secondary Printing:

Example 1

A hotel has a wine steward for bottles of wine, with a dedicated printer for Wine Bottles. When the wine is ordered, they want to know what other alcoholic beverages should be delivered with the wine, and they need the bartender to know that the drinks should be delivered by the Wine Steward.

Solution

This situation is actually no different from the Hot Printer and Cold Printer Setup. This just shows another example of how this could be used. In this example, two Order Devices, “Wine Bottles Printer” and “Bar Printer” send all broadcasts and receive secondary print jobs. This is the classic case of Secondary Printing.

Example 2

Another hotel has two shared revenue centers. One RVC has its kitchen is in the Hotel Tower, and one RVC with its kitchen is in the fine-dining restaurant, which is a stand-alone building. The site would like to allow any customer to order any item from any location. The situation then presents itself: If a customer in the fine-dining restaurant orders an item from the Hotel Tower, how does anyone in this building know that someone needs to walk to the other building to get the items?

Solution

Through proper use of programming Secondary Printing, this situation is addressed. The Order Device table for the Fine Dining restaurant is programmed like this:

```
1 – Tower Hot Printer
2 – Tower Cold Printer
3 – Tower Expo Printer (Broadcast to All Printers)
4 – ()
5 – Restaurant Hot Printer
6 – Restaurant Cold Printer
7 – Restaurant Expo Printer (Print Secondary Print Jobs)
```

When a server/bartender rings an item that is supposed to print to the Tower RVC, the item prints to the Tower Expo Printer, which then broadcasts its items to the Expo Printer in the Restaurant. This way, the fine-dining kitchen knows an item needs to come from the Tower RVC.

The Order Device table for the Towers RVC would have the opposite options enabled:

```
1 – Tower Hot Printer
2 – Tower Cold Printer
3 – Tower Expo Printer (Print Secondary Print Jobs)
4 – ()
5 – Restaurant Hot Printer
6 – Restaurant Cold Printer
7 – Restaurant Expo Printer (Broadcast to All Printers)
```

When a server/bartender rings an item that is supposed to print to the fine-dining restaurant, the item will print as a secondary item to the Tower Expo Printer, so the Towers kitchen knows an item needs to come from the fine-dining RVC.

See also

- Disambiguation printing page

Order Devices	Order Device · Order Device Redirection · Order Device (PMC Procedure) · Autofire · Dopplebon Printing · Hold and Fire · How Menu Items Print · Kitchen Themes · Local Order Receipt · Order Device Routing by Order Type Setup · Production Items for KDS · Routing Group · **Secondary Printing**
Learning series: Order Devices	

Service Host

A **Service Host** is an IP-addressable Windows-based computer that runs one or more Simphony services; in short, it is a physical piece of hardware that runs one or more pieces of Simphony software. In EMC, a programmer determines the Service Host to be used for each KDS Controller record, Interface record and Credit Card Driver record. In addition, the Offline Cache Service Host and SIM File Access Service Host are configured in each Property, in the Property Parameters module.

This article relates to programming of an EMC module.

This article discusses a topic related to **hardware**.

This article discusses a **technical topic** that is not intended for all readers.

Contents

- 1 EMC Configuration
  - 1.1 Service Hosts Module
    - 1.1.1 Add OPS Client to this Service Host
  - 1.2 Workstations Module
    - 1.2.1 Remove OPS From Service Host
  - 1.3 Interaction with CAL Packages
- 2 Service Host Tab
  - 2.1 Using the Tab
  - 2.2 Selecting a Record
    - 2.2.1 Add New Service Host
  - 2.3 Viewing the Selected Record
- 3 More about Configuration
  - 3.1 Rules and Guidelines
  - 3.2 Configuration Scenarios
  - 3.3 Service Pack 10 Configuration Changes
- 4 Installing a Service Host

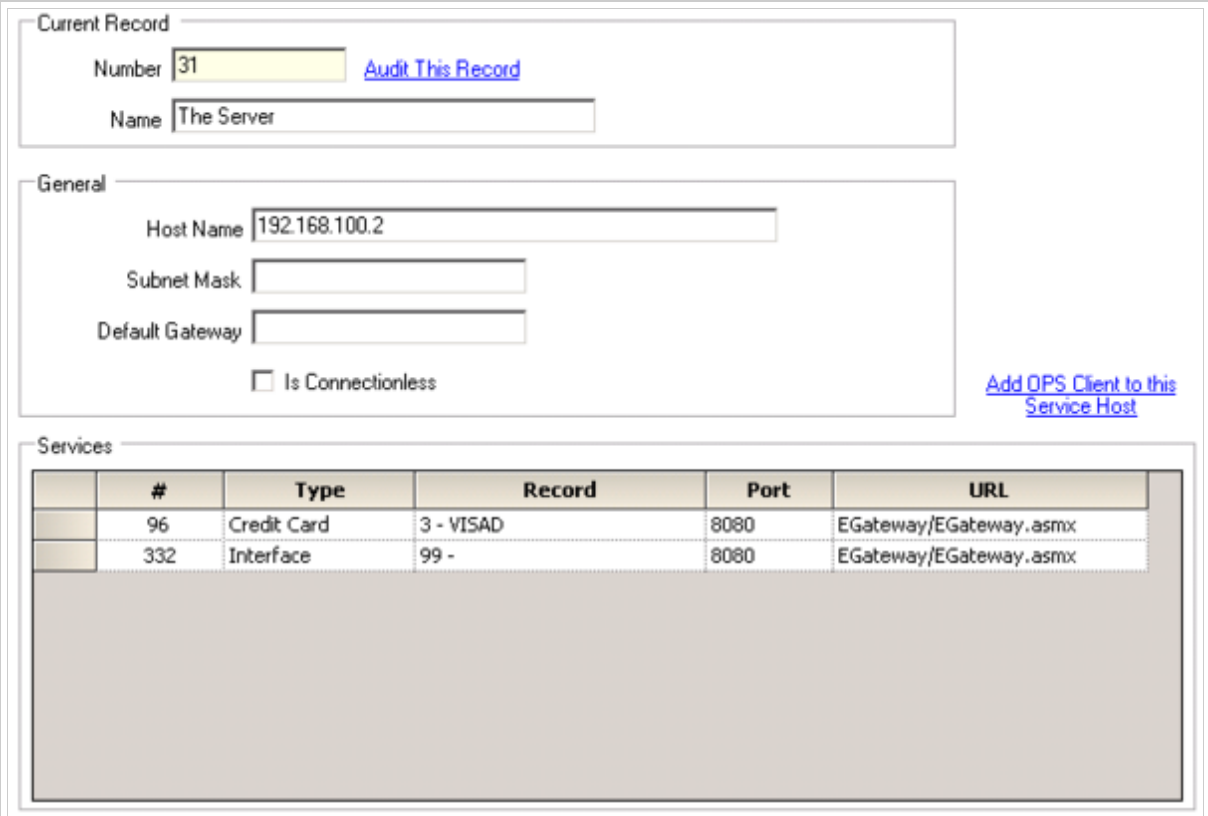
EMC Configuration

From a configuration standpoint, there are two locations where Service Hosts can be configured: The Service Hosts module and the Workstations module. (When a workstation record is created, a Service Host record for that physical workstation is created as well.)

When should a programmer use the Service Host module vs. the Workstation module to create Service Hosts? The answer is simple: if a computer is intended to run an OPS process, it should be created in the Workstations module. If a computer is intended to be a standalone PC (running only a KDS Controller or Credit Card Driver, perhaps), it should be created in the Service Hosts module. Note that if a programmer creates a standalone Service Host and realizes later that there should be an OPS process configured, EMC provides functionality to make this change. In addition, EMC lets a user delete a workstation record while keeping the Service Host on which it is configured. Both of these scenarios are discussed in more detail, below.[1][2]

Service Hosts Module

The **Service Hosts** module is accessed from the Enterprise Scope and contains the following configurable fields:



Form View of the Service Host module from EMC.

Name
: A user-defined name that describes the computer. An example may be: "Property 1 KDS Controller".

Host Name
: The name or IP Address of the physical computer.

Subnet Mask
: Enter the Subnet Mask of this Service Host.

Default Gateway
: Enter the Default Gateway of this Service Host.

Is Connectionless
: When this option is enabled, this service host will open and close a new connection for each web service call. While slightly slower than leaving this option unchecked, enabling this option helps to prevent computers from reaching the maximum number of web connections allowed. This option should be enabled for Service Hosts running on the Windows XP operating system.

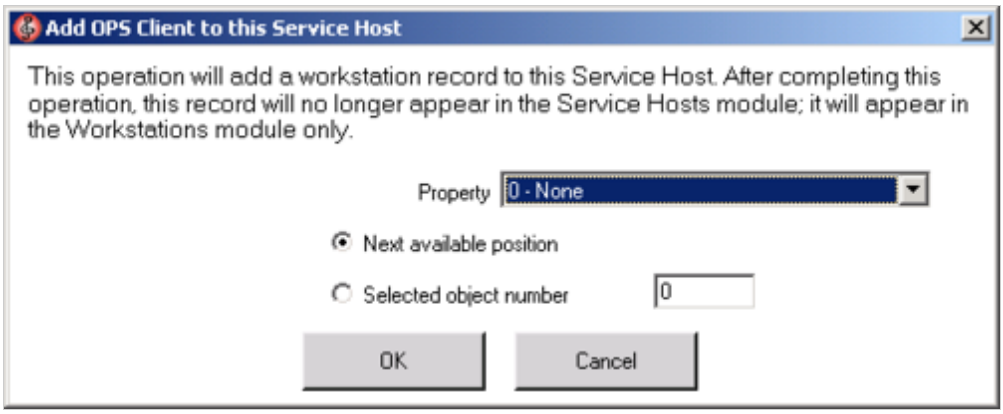
Services
: This grid lists each service that is running on the selected Service Host. This grid is informational only; it is not possible to add or remove Services from a Service Host via this view.

Add OPS Client to this Service Host

From Form View of the Service Hosts module, there is a link that lets the user "Add OPS Client to this Service Host". This link lets the user add a workstation record to the Service Host, essentially "converting" a Service Host record to a Workstation record. After this action is performed, the record will no longer appear in the Service Hosts module; it will appear in the Workstation module.

When the link is clicked, the add dialog appears. From this view, the user selects the Property where the workstation will be created, and the object number to be used. (The user may select "Next available position" to

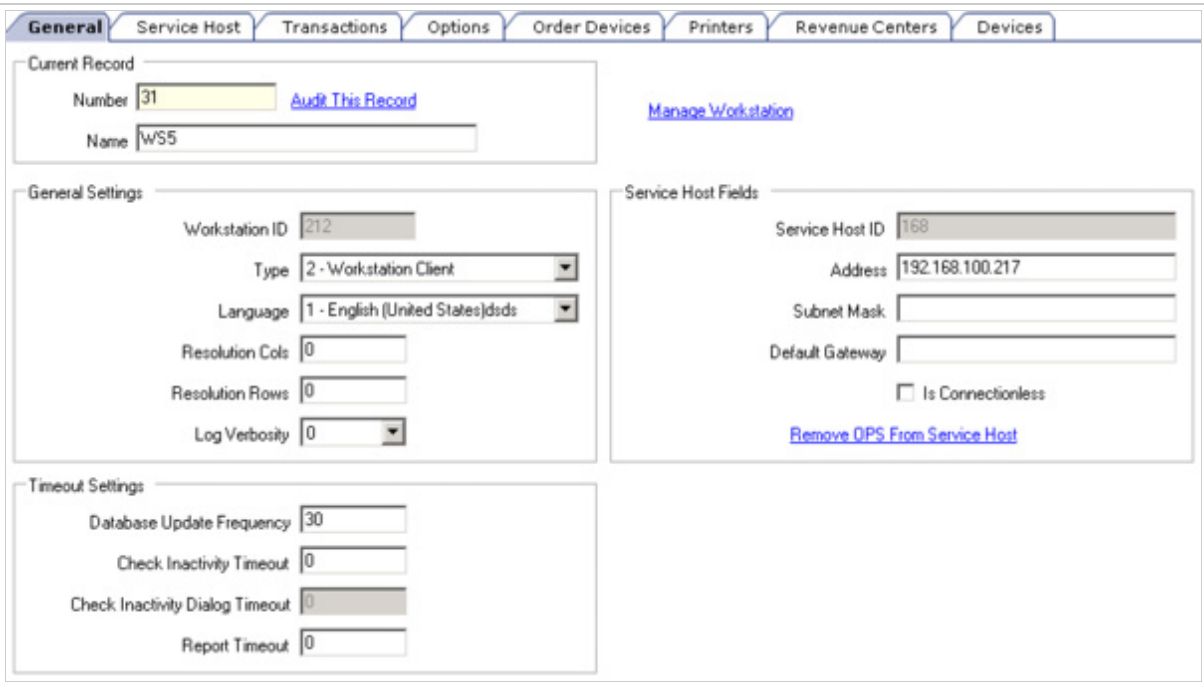
have the object number created automatically.) The logged-in user can add workstations only to the properties where privileged, as determined by Employee Role permissions.



The **Add OPS Client to this Service Host** dialog.

Workstations Module

On the General Tab of the **Workstations Module**, the configurable Service Host fields are displayed. The Address, Subnet Mask, Default Gateway, and Is



On the General Tab of the Workstations Module, the configurable Service Host fields are displayed.

Connectionless fields allow the same configuration as the fields from the Service Host module.

In addition to the General Tab, the Workstations Module includes a Service Host tab. This tab displays all the services that are programmed for the Service Host. More information about this tab is available below.

Remove OPS From Service Host

From Form View of the Workstations module, there is a link that lets the user "Remove OPS From Service Host". This link lets the user delete the workstation record without deleting the Service Host on which it runs. This operation is designed for situations where a PC is running an OPS client in addition to other services, but the OPS client is no longer necessary.

After clicking the link, the user is prompted to confirm; after pressing Yes, the record is deleted and removed from the list of workstations. Note that this link is accessible only by users who have the ability to delete workstations in the current property.

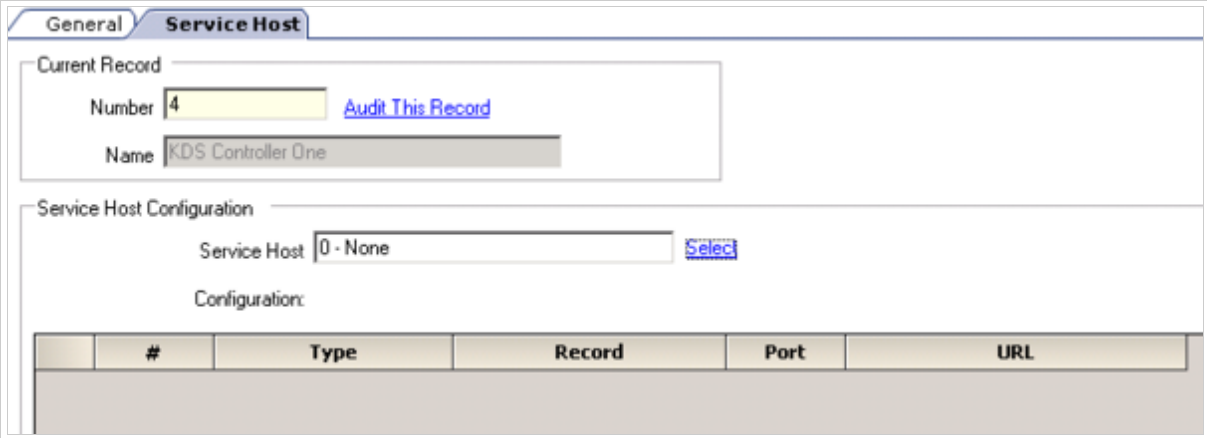
Interaction with CAL Packages

When Service Hosts are configured throughout EMC, records in the CAL Packages module are updated.

These CAL Package modifications occur automatically in the background during add/save/delete operations as appropriate. They are logged in Audit Trail as changes to the CAL Packages module.

- In the Service Hosts module:
  - A "skip" deployment is added to the SimphonyClient package for the Service Host. This ensures that the Service Host will not receive an OPS client.
  - Deployments for the EGateway and EGatewayPrereqs packages are added when a Service Host is added.
  - Deployments for the EGateway and EGatewayPrereqs packages are removed when a Service Host is deleted.
- In the Credit Card Drivers and Interfaces modules:
  - Deployments for the EGateway or EGatewayPrereqs packages are added when a Service Host is selected for the record, and the selected records does not include the EGateway or EGatewayPrereqs package already.
  - Deployments for the EGateway or EGatewayPrereqs packages are removed when the Service Host for the record is set to "0" and no more services remain on the Service Host.
  - Deployments for the EGateway or EGatewayPrereqs packages are removed when the selected record is deleted and no more services remain on the Service Host.
- In the KDS Controllers module, the behavior is the same as the CC Drivers and Interface modules. In addition, the PosToKdsHandler package is updated accordingly.

Service Host Tab



The Service Host tab from EMC. This tab is used in modules to configure the Service Host on which the selected record will run. In this example image, no Service Host has been selected for the current record.

After creating a Service Host or workstation, the record becomes available in other modules that require a Service Host. For example, a KDS Controller requires a Service Host; in the KDS Controllers module, the Service Host Tab lets the programmer determine the Service Host on which the KDS

Controller record will run.

Using the Tab

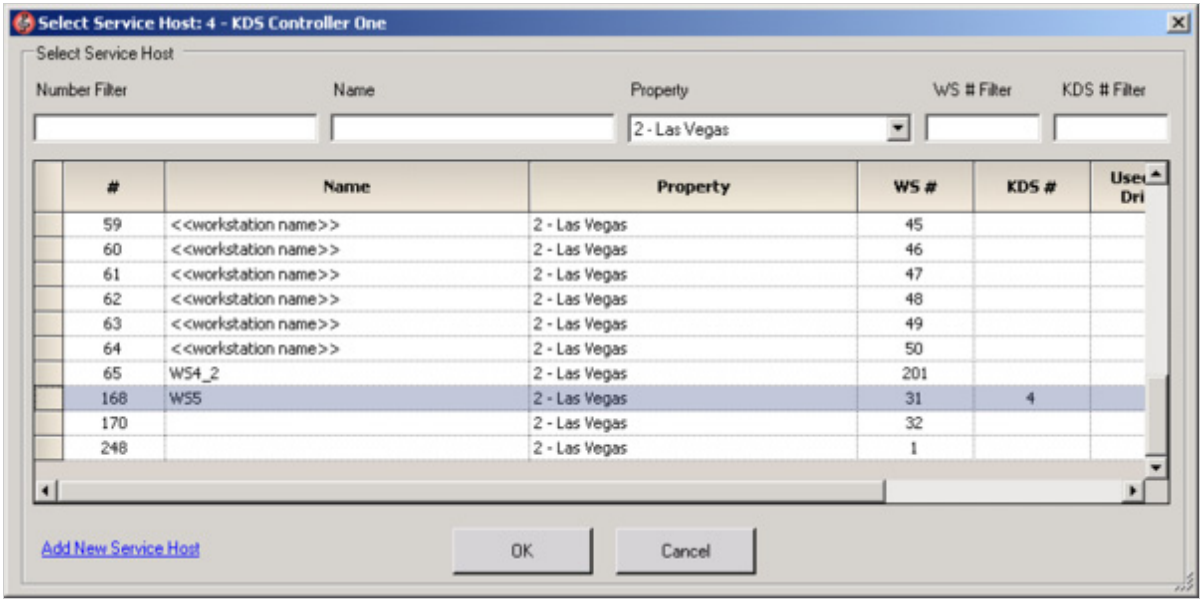
The Service Host tab contains the following fields:

Service Host
: Select the Service Host for this record. This list displays all the workstations in the Property, in addition to any Service Host records configured for the property.

Configuration
: After a Service Host is selected, the configuration of the service host (IP Address, Gateway, and Net Mask) will be displayed.

Services List
: When a Service Host is selected, all its services display in the grid; the fields in the grid are all read-only except for the service of the currently-selected record.

Selecting a Record



When a user selects the "Select" link to select a Service Host, this is the dialog that displays. When the dialog opens, the Service Host that is currently configured for this record is selected.

When the user presses the "select" link, the Service Host Selection dialog displays. This dialog is simply a selection dialog, but the grid displays additional columns to give the programmer more information about the records. In addition, there are five fields above the grid that let the user filter the data.

The grid consists of the following columns:

#
: This column displays the Service Host ID of each Service Host.

Name
: This column displays the name of each Service Host. For records that are workstations, the Service Host name is always the name of the Workstation.

Property
: This column displays the Property to which the Service Host belongs. This column should only be used as

a guide; it is possible (however unlikely) that a Service Host runs a Workstation from one Property but a KDS Controller from another property. The value displayed in this column is determined by this order: if the Service Host is a workstation, the Property of that Workstation Record will be displayed; if the Service Host is a KDS Controller, the Property of that KDS Controller Record will be displayed; otherwise, the text "Enterprise" will be displayed.

WS #

For each Service Host, this column will display the Object Number of the Workstation Record for the Service Host, if one exists.

KDS #

For each Service Host, this column will display the Object Number of the KDS Controller Record for the Service Host, if one exists.

Used By CC Drivers?

This column displays a checked cell if the selected Service Host is being used by one or more Credit Card Driver Records. Unlike WS and KDS, multiple Credit Card Driver Records can be linked to the same Service Host.

Used By Interfaces?

This column displays a checked cell if the selected Service Host is being used by one or more Interface Records. Unlike WS and KDS, multiple Interface Records can be linked to the same Service Host.

OLC/OTC?

This column displays a checked cell if the selected Service Host is being used as an Offline Labor/Transaction Cache.

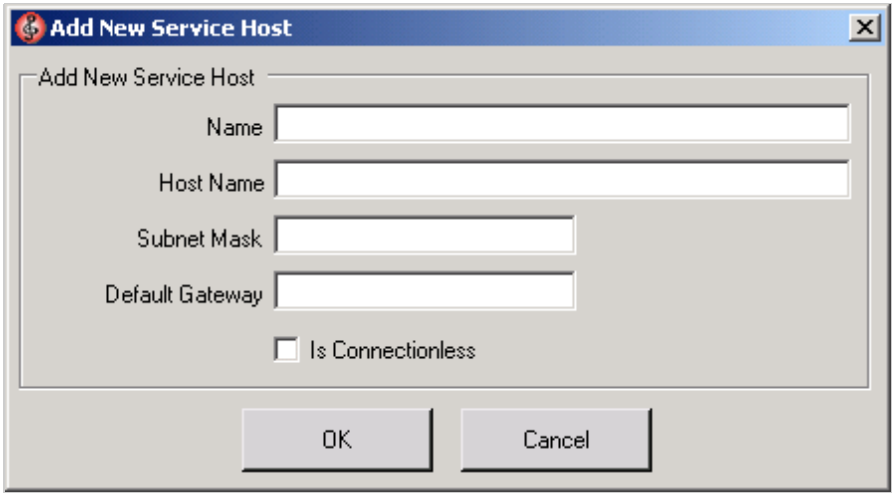
SIM?

This column displays a checked cell if the selected Service Host is being used as a SIM File Access Service Host.

Add New Service Host

It is possible that the programmer entered this dialog prior to creating the Service Host (this may be intentional, see below). If this is the case, the programmer can click the "Add New Service Host" link. This action will display the add dialog, which lets the user enter the name and address information for the new Service Host. After pressing "OK", EMC will create the new Service Host and link the record to it.

Note: *The "Add New Service Host" link displays only for users who have role permissions to add Service Hosts.*



The **Add New Service Host** dialog displays when the user presses the "Add New Service Host" link from the Service Host Dialog.

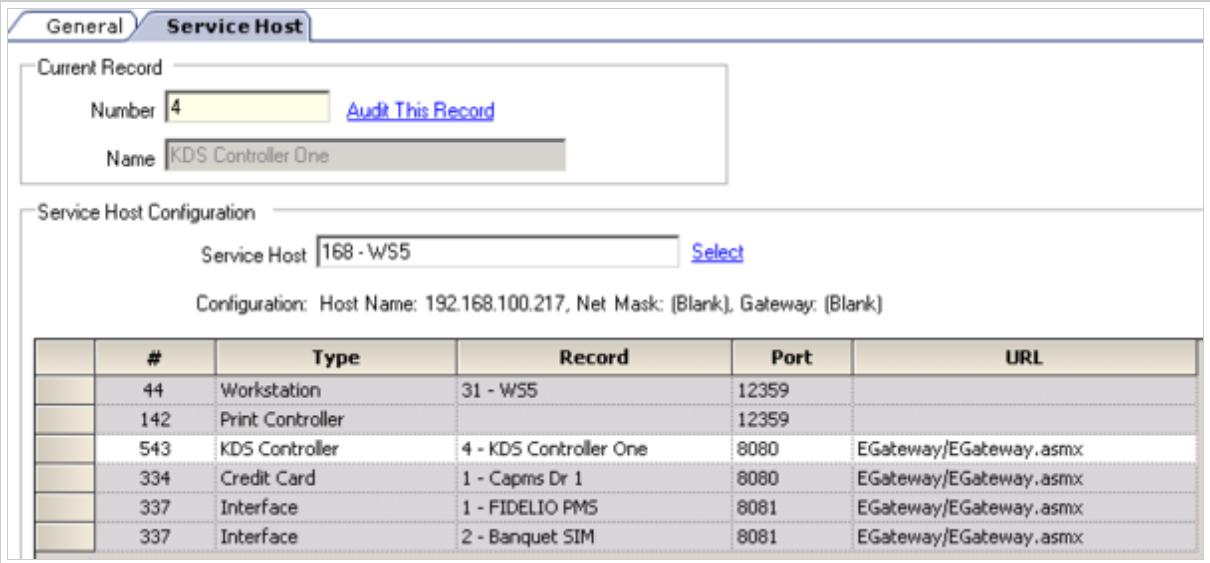
Viewing the Selected Record

In the example image, the user selected Service Host 168. After selecting this Service Host, the grid displays all the records that are configured to use the selected Service Host. The columns of the grid display the following

data:

#

This column



#	Type	Record	Port	URL
44	Workstation	31 - WS5	12359	
142	Print Controller		12359	
543	KDS Controller	4 - KDS Controller One	8080	EGateway/EGateway.asmx
334	Credit Card	1 - Capms Dr 1	8080	EGateway/EGateway.asmx
337	Interface	1 - FIDELIO PMS	8081	EGateway/EGateway.asmx
337	Interface	2 - Banquet SIM	8081	EGateway/EGateway.asmx

The Service Host tab from EMC. This tab is used in modules to configure the Service Host on which the selected record will run. In this example image, the current record is a KDS Controller; it is running on Service Host 168. The grid displays all the services running on this Service Host.

displays the ServiceID of the service record. This column is not configurable, and it is displayed for troubleshooting purposes only.

Type

This column displays the type of Service Record for each service.

Record

This column displays the object number and Name of the Service Record. For example, if a Workstation, KDS Controller, and Credit Card Driver are all running on the same Service Host, this column will display the object number and name of the Workstation, KDS Controller, and CC Driver.

Port

This column displays the Port number for each service on the selected Service Host. This is the only configurable column of the grid.

URL

The URL of a service is used when constructing the full path to be used to connect to the service. For example, Simphony Services are connected using a path like: **http://ServiceHostName:Port/URL**. This field displays for informational purposes only; it cannot be edited.

Once a Service Host record has been selected, the panel displays the configuration of the Service Host (its IP Address, Gateway, and Net Mask) and the grid displays all the services that are running on the selected Service Host. In the example, the following services are running on Service Host 168:

- Workstation record #31
- A Print Controller Service. A Print Controller runs on every Workstation client.
- The service for the selected KDS Controller record.
- Credit Card Driver record #1.
- Interface records #1 and #2.

All rows in the service grid are disabled except the row containing the service for the selected record. In the example image, the KDS Controller row is enabled, because the record is a KDS Controller. The only configurable field for the enabled row is the port number. Note that a double-click on any row will take the user to the module of the selected record.

More about Configuration

Rules and Guidelines

Only one type of service is able to run on any Service Host. This limits a single computer to running:

The Selection Dialog prevents a user from adding an invalid Service to a Service Host. For example, it is not possible to add two KDS Controller records to the same Service Host.

- One OPS client
- One Print Controller
- One KDS Controller
- One SIM File Access Service
- One Offline Cache Service
- One Credit Card Driver Service - Multiple Credit Card Driver Records can be configured to use the same Service Host.
- One Interface Service - Multiple Interface Records can be configured to use the same Service Host.

Configuration Scenarios

EMC allows a number of different ways to view, edit, and add Service Hosts. In most cases, a privileged user can configure Service Hosts without actually entering the Service Host module! This section describes common scenarios for Service Host configuration and the best methods for addressing them:

These instructions should be used as guidelines; they assume the logged-in user has full permissions on EMC.

I have a computer that I want to configure to be a Service Host for a KDS Controller (or CC Driver, or Interface).

1. Enter the KDS Controller (or CC Driver, or Interface) module.
2. Add a new record.
3. After the record has been created, press "Select" on the Service Host Tab.
4. From the Service Host Dialog, click "Add New Service Host". Enter the information and press OK.
5. Save the record.

I have a computer that I want to configure to be a Service Host for a KDS Controller, CC Driver, and Interface.

1. Continuing from step #5 above, the user would then...
2. Enter the CC Driver module and create or select a record.
3. Configure the CC Driver to use the Service Host created in #4 from above. Save the record.
4. Enter the Interface module and create or select a record.
5. Configure the Interface to use the Service Host created in #4 from above. Save the record.

I have an existing Service Host that runs a KDS Controller, and now I want it to run a CC Driver as well.

1. Enter the Credit Card Driver module.
2. Create or select the Credit Card Driver that needs to be configured.
3. From the Service Host Tab, select the existing Service Host.
4. Save the record.

I have an existing Service Host that runs a KDS Controller and an Interface Service. I want to add an OPS client to this computer.

1. Enter the Service Hosts module.

2. Select the Service Host.
3. Click the "Add OPS Client to this Service Host" link, and configure the information.
4. Press OK.

Service Pack 10 Configuration Changes

The information on this article discusses the configuration for Service Hosts in Simphony 1.0 Service Pack 10 and later versions. In earlier versions, configuration was different; the differences are summarized below:

- Any reference to "bind to service host" or public/private service hosts has been removed. Starting with Service Pack 10, each workstation will always be linked to one Service Host, and this one-to-one relationship will not change.
- The Services module has been removed. There is no longer a need to add/remove services because EMC handles this automatically:
  - When a KDS Controller record is created, a service for that record is created automatically. This one-to-one relationship will not change.
  - A SIM File Access Service record is created when a Property is created.
  - For Credit Card Driver and Interface records, a service record is created when necessary. Unlike KDS Controllers records, it is possible to link multiple CC and Interface Records to the same Service Host. When these records are, a Service record is not created at the same time. EMC will create the Service Record when the interface is saved and its Service Host is not zero.

Installing a Service Host

Each Service Host uses CAL to be configured, however the Service Host must first have CAL installed to receive automatic CAL updates. To install CAL on a Service Host, follow these steps:

1. Browse to `http://AppServerName:8080/egateway/download/cal/win32/setup.exe`. (AppServerName is the name of your application server.)
2. The installation prompts "Install Simphony to (directory)". The default is `C:\Micros`. Keep the default or press "Change" to enter a different directory, then press "Next".
3. CAL will run; follow the standard CAL steps:
   1. At the list of Simphony servers, select the appropriate server.
   2. At the Property selection dialog, select the appropriate Property.
   3. Select the appropriate Workstation or Service Host.

Service Total

The term **Service Total** means to end the current service round, triggering output to order devices. The act of Service Totalling temporarily removes a guest check from the workstation display, and saves the check information in the database for recall.

This article belongs to the MICROS **Important concepts** category.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Transaction Flow
- 2 EMC Configuration
  - 2.1 Send Key
  - 2.2 Print Key
  - 2.3 Hold & Fire
  - 2.4 Autofire
- 3 See also

Transaction Flow

The flow of a transaction in a restaurant may be:

1. Waiter/waitress takes the drink order for customers
2. Waiter/waitress begins a check on the MICROS Workstation
3. Waiter/waitress adds two drinks
4. Waiter/waitress presses a Service Total key (often labeled SEND)
5. The drinks print at the bartender's Order Device
6. Waiter/waitress takes the drinks from the bar to the guests
7. Waiter/waitress takes the food order
8. Check is picked up on the MICROS Workstation and service totalled again
9. etc...

Service Total is typically the most-used tender type, as seen here. It basically means "I'm done adding to this order at this time." While a payment is usually added to a check only once, a service total is performed any time a user is done accessing the check.

EMC Configuration

A few of the typical Service Total tenders are described below. Each of these tender examples are programmed in the Tender Media module with a Tender Type of **2-Service Total**.

Send Key

Behavior

When this key is pressed, this is a "pure" service total. As described above, it basically means "I'm done adding to this order at this time." Menu Items will print to Order Devices as appropriate.

Options

No options are enabled

Menu Levels

Typically, all Menu Levels are enabled

Output

Tender Output: You will find that these are often all checked, but they don't actually apply to Service Total tenders

Order Output Disable

These should never be enabled for Service Total key types.

Print Key

Behavior

This key is similar to the SEND key described above.. it basically means "I'm done adding to this order at this time." Menu Items will print to Order Devices as appropriate. Unlike the Send Key, the "Print Key" causes a Guest Check to print. Often, the Print key is the last Service Total tender applied to a check — the waiter/waitress uses this key to print the check and show the customer the amount due.

Options

Typically, these options are enabled:

1. Print Check on Demand
2. Print Memo Check
3. Print Summary Totals
4. Print Sales Itemizers

Menu Levels

Typically, all Menu Levels are enabled

Output

Tender Output: You will find that these are often all checked, but they don't actually apply to Service Total tenders

Order Output Disable: These should never be enabled for Service Total key types.

Hold & Fire

See the Hold and Fire article for more information about configuring these Tender Types.

Service Charge

Contents

- 1 Understanding service charges
  - 1.1 Types of service charges
- 2 Configuring service charges

A **corresponding article** for this topic exists in the Data Access namespace.

This article relates to programming of an EMC module.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses behavior that is important for **Reporting**.

Understanding service charges

A **service charge** is the amount added to a sales transaction for a service rendered and is posted to:

- The person or people providing the service (a server or bartender, or a team of servers; see Tip).
- "The House" or the establishment providing the service.

Types of service charges

You can configure the following types of service charges:

- Service charges that report as Tips on employee tip reports.
- Service charges that report as Service Charges on employee tip reports.
- Service charges that are paid to the house
- Non-revenue service charges
- Gift certificates sold

Configuring service charges

1. In the EMC, select Enterprise / Zone / Property, select Configuration, and then select **Service Charges**.
2. Enter information for the following General Settings fields.

Field	Description
Percent	Enter the service charge percentage.
Amount	Enter the service charge amount.
Tips Paid Tender/Media	Select a Tender/Media from the drop-down list if you want to link a tender to this service charge.
	Enter the High Amount Lock Out (HALO) value for this service charge. This field

HALO	prevents operators from entering abnormally high values for this service charge. You must have the **[Authorize/Perform Over HALO Amounts on [Service Charge] Keys]** option enabled for your employee role to exceed this limit. When this value is 0, there is no HALO for this service charge. This field does not apply to automatic service charges.
Tax Class	Select a Tax Class from the drop-down list if you want to apply a tax class to this service charge.
Privilege Group	Select a Privilege Group to restrict use of this service charge to employees who are linked to the same privilege group. You can set the field to 0 to allow all employees to use this service charge.
Percent to Tips Paid	Enter the percentage of a charged tip that posts to Tips Paid Tender/Media. For example, if you enter 0, 100% of the service charge posts to the Tips Paid Tender/Media. You can select 0-None from the **Tips Paid Tender/Media** drop-down list to post 0% to the Tips Paid Tender/Media.
Report Group	Select the report group to which this service charge record belongs.

3. Select the appropriate options.

Option	Description
1 - ON = Open; OFF = Preset	Select this option to make this service charge an open service charge, prompting the operator for the amount or percentage. Deselect this option to use a preset amount or preset percentage for this service charge.
2 - ON = Amount; OFF = Percentage	Select this option to make this service charge an amount service charge. Deselect this option to make this service charge a percentage service charge.
3 - Post to Charged Tips Total on Tip Reports	Select this option to post this service charge to the Direct Charged Tips total and to add it to the Total Tips on employee tip reports. This setting records charged tips that employees receive directly from customers. If you select this option, operators who use it must also enter a charged tip payment using a tendering key with Tender/Media option **[Post to Charged Receipts on Tip Reports]** enabled. ▪ Select either **[3 -Post to Charged Tips Total on Tip Reports]** or **[11 - Do Not Post to Gross Receipts]**, but not both. ▪ Select either **[3 -Post to Charged Tips Total on Tip Reports]** or **[4 - Post to Service Charges Total on Tip Reports]**, but not both.
4 - Post to Service Charges Total on Tip	Select this option to post the service charge to the Service Charges total, but not the Total Tips or the Gross F&B Receipts total. Use this option for service charges that are paid to "the House". This setting records tips that employees receive as wages through payroll. Deselect this option to post the service charge to the Gross F&B Receipts, but not the Service Charges total. The Service Charges total on tip reports meets the reporting requirements of U.S. IRS Form 8027, which states that this total should equal all tips that

Reports	are paid to the employee as wages, and are less than 10% of the transaction total. • Select either **[3 - Post to Charged Tips Total on Tip Reports]** or **[4 - Post to Service Charges Total on Tip Reports]**, but not both.
5 - Reference Entry Required	Selecting this option requires the operator to enter a name or number when using the service charge.
6 - Validation Required	Select this option to print a validation chit when the operator uses the service charge.
7 - Non-Revenue Service Charge (No Post to Sales)	Select this option to create a service charge that can be paid by credit card without posting to the Simphony sales totals. (A tracking group total can track this amount if necessary.) This option is often used to create a service charge for gift certificate sales as the customer can pay for the gift certificate with a credit card. When you select this option, you must configure the service charge as an amount service charge. A non-revenue service charge cannot post to a check that contains menu items. If the tender requires a cashier link, posting a non-revenue service charge also requires a cashier link. When using this option, deselect options **[3]** and **[4]**.
8 - Taiwanese Paid Out	Select this option to create a service charge records repayment of cash from a Taiwanese paid out.
9 - Reset Itemizer(s)	Select this option to reset service charge itemizers. This option prevents all service charges from being applied twice to menu items that post to the same service charge itemizers. Deselecting this option allows multiple service charges to apply to the same service charge itemizers.
10 - Service Charge Adds to Guest Count	Select this option to increment the transaction's guest count by one every time the service charge applies to the transaction. This option is often used for non-revenue service charges that apply as cover charges. Selecting the RVC Parameter option **[8 - Use Number of Seats for Guest Count]** overrides the setting of this option. When the operator presses the **Number of Guests** key during a transaction, the guest count no longer increments when the service charge applies to the transaction. The operator must maintain the guest count manually from that point.
11 - Do Not Post to Gross Receipts	Select this option to prevent this service charge from posting to gross F&B receipts on tip reports. This is intended for service charges that meet the U.S. Internal Revenue Service's definition of non-allocable receipts (as defined in the IRS Instructions for Form 8027). Deselecting this option allows the service charge to post to gross F&B receipts on the tip reports. • Select either **[3 -Post to Charged Tips Total on Tip Reports]** or **[11 - Do Not Post to Gross Receipts]**, but not both.
12 - Item is Shareable	Select this option to share the item between two or more seats or two or more checks when using TouchEdit or TouchSplit.

13 - Cash Tips	Select this option to add the Direct Cash Tips total on the tip reports. Selecting option **[3 - Post to Charged Tips Total on Tip Reports]** or **[4 - Post to Service Charges Total on Tip Reports]** overrides this option. This option is used in a cashier environment where the guest leaves the table and pays their check directly with a cashier. After paying the bill, the cashier can post a value to a Cash Tip Service Charge. This Cash Tip Service Charge posts to the employee's Direct Cash Tips total on the Employee Tip Report.
14 - Service Charge Used For Stored Value Transactions	Select this option if the service charge is used for stored value transactions.
15 - Mask Account Number	Use this option for service charges with reference entries. Select this option to mask the account number (often a gift card number or other reference entry) on guest checks and customer receipts. Deselect this option to keep the text un-masked.
16 - Encrypt Service Charge Reference Entry	Use this option for service charges with reference entries. Select this option to encrypt the reference entry (in the MICROS relational database) that is associated with this service charge. Deselect this option to post the unencrypted reference entry information to the MICROS relational database.
17 - Use Floor Amount (Automatic Service Charges Only)	This option only applies to the service charge in revenue centers where it is used as an automatic service charge. Select this option to require a minimum value for the automatic service charge. Then enter the minimum floor amount in the Amount field, which is only active for percentage service charges when you select option **[17]**.
18 - Gift Certificate Sold	Select this option to create a service charge that can be paid without posting to the system's sales totals. (A tracking group total can track the amount if necessary.) This option is similar to **[7 - Non-Revenue Service Charge]**, except that menu items can be present on the check in addition to the service charge. When you select this option, you must configure the service charge as an amount. If a tender requires a cashier link, posting a non-revenue service charge also requires a cashier link. Selecting this option dims option **[7]**.
21 - Post To Till Totals	Select this option if you are using Cash Management and the server must be assigned to a Cash Management till when applying the service charge. Deselect this option if the Cash Management accounting method is set to Server Banking.
22 - Add to Checks Begun/Paid Count if Non-Revenue	This option applies to the service charge if it is configured as non-revenue (option **[7]** is selected). Selecting this option increases the checks begun/paid count on reports when the non-revenue service charge applies to a transaction. Deselecting this option results in no change to the checks begun/paid count.
	Select this option to use the service charge as a rental deposit. Rental deposits work with

23 - Rental Deposit	the deposit handling feature and are necessary to apply a deposit to a check. Service charges with this option enabled may be non-revenue service charges. However, unlike traditional non-revenue service charges, a check may contain more than one rental deposit service charge.
26 - Configure as Banquet Tip	Select this option to include the amount of the service charge transaction in the Tip line item of the banquet check.
27 – Configure as Banquet Fee	Select this option to include the amount of the service charge transaction in the Fees line item based upon the selected service charge on the banquet check.

Dollars on the Net Payment Card Driver Configuration Guide

General Information

About This Document

This document provides the steps necessary to implement the $$$ on the Net (pronounced Dollars on the Net) by Shift4 payment card driver for use with MICROS Simphony v2.6.

The Simphony payment configuration settings are dependent on the third party payment card software which the property is using ($$$ on the Net, CAPMS, Fusebox, or VisaD).

All aspects of the payment card driver configuration are maintained in the Enterprise Management Console (EMC) module within Simphony.

Declarations

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Edition	Month	Year	Version	Comments
A	October	2012	2.5.0	Configuration introduced with Simphony v2.5.
B	July	2013	2.5.3	Updated document with instructions for new loadable payment driver, available with Simphony v2.5 MR3. Added Professional Services Procedures for Distributing Third Party Credit Card Driver Package (Appendix A).
C	January	2014	2.6.0	Updated document for v2.6. The Third Party Credit Card Driver Package procedures were moved to a stand alone document as they can be utilized by all third party payment card drivers.

Contents

To help you navigate the document, information is organized in sections and displayed in the following sequence:

Who Should be Reading This Document 4

What the Reader Should Already Know 4

Installation Procedures 5

Simphony Setup Procedures 6

Who Should be Reading this Document

This document is intended for the following audiences:

- MICROS Installers/Programmers/System Test Associates
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of POS terminology and concepts
- Working knowledge of the Microsoft Windows interface
- Understanding of basic network concepts

Installation Procedures

UTG Installation

Overview

The Universal Transaction Gateway (UTG) is installed by a Shift4 representative and is used for communication between Simphony and Shift4. This installation will need to be completed prior to configuring the Shift4 payment card driver. UTG is installed on only one machine (single host location) at a property. UTG is not installed on each terminal.

***Note**: UTG does not run on the Windows CE operating system.*

An instance of the UTG must also be installed and configured in the MICROS Hosting Center to support all Batching activity. Depending upon transaction volume, additional UTG's can be implemented in the Hosting Center to handle the required daily transactions.

UTG Configuration Requirements

Obtain the IP address(es) of the computer(s) that will be required to process credit card transactions. Provide this list to your Shift4 representative. The IP address(es) entered into UTG by the Shift4 representative will be the only machine(s) allowed to process credit card transactions.

Simphony Setup Procedures

Before You Begin

Before configuring the Dollars on the Net payment driver, the following should be noted:

- UTG must be installed at the Hosting Center by a Shift4 representative
- Simphony v2.6 must be installed at the property.
- You must have access to the EMC module within Simphony.
- Any custom payment or device drivers that will be utilized must have been implemented. Please refer to the *Guide to Distributing Third Party Credit Card Driver CAL Packages* for instructions.

EMC Configuration

Overview

This section provides instructions to configure the following payment card driver for use with Simphony v2.6:

- Dollars on the Net by Shift4

All aspects of the payment card driver configuration are maintained in the EMC module within Simphony. You will need to configure the payment card driver and payment card module, and then configure the screen/button design for Front of House (FOH) usage.

Payment Driver Configuration

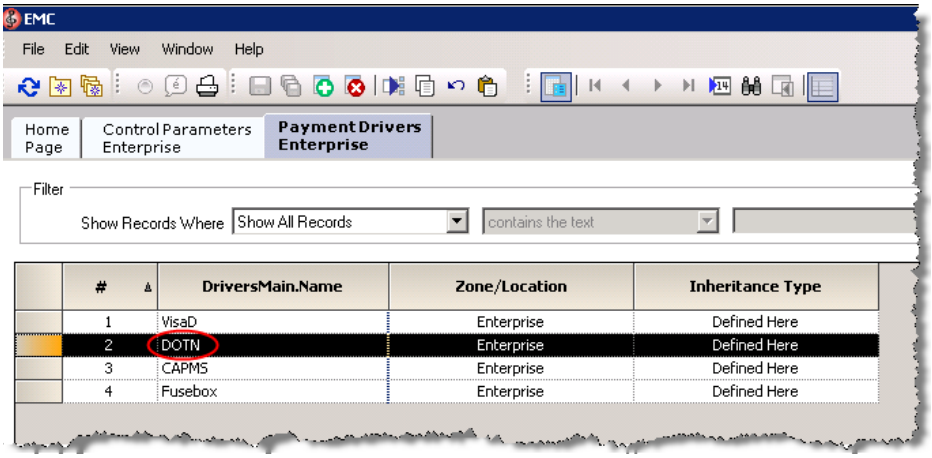
Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.

2. Navigate to **Setup tab | Payment Drivers**.

3. Add a new record for the DOTN driver using the green Insert Record button (if it does not already exist).



4. Open the new driver, and then click the link called '**Import from a file**'.

5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**DOTNPayment.dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:

Assembly/Class	
Assembly Name	DOTNPayment.dll
Category And Type	
Class Name	Micros.Payment.CreditCardDrivers.Shift4DOTNPayment
Description	**Dollars on the Net Payment Driver**
Display Name	**Shift4**
Driver ID	**DOTN**

- **Description -** This value describes the Payment Driver.
- **Display Name -** This value appears in the Driver display drop-down list.
- **Driver ID -** This is for internal use only. Use '**DOTN**' unless instructed otherwise.

Common Driver Properties

9. In the Common Driver Properties section, enter information in the following fields:

Common Driver Properties	
Bank Identification Number	**1**
Batch Number	**1**
Merchant Number	**1**
Store Number	**1**
Terminal Number	**1**

- **Bank Identification Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.
- **Batch Number -** This value cannot be 0 (zero) or empty. Set to '**1**'.
- **Merchant Number** - This value cannot be empty. Set to '**1**'.
- **Store Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.

- **Terminal Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.

Transport Service Properties

10. In the Transport Service Properties section, enter information in the following fields:

Transport Service Properties	
Batching Host	[IP Address of UTG in Hosting Center]
Batching Host Port	17476
Host Timeout	30
Primary Host	0.0.0.0
Primary Host Port	17476

- **Batching Host** - The IP Address of the machine where the UTG application is installed at the MICROS Hosting Center.

- **Batching Host Port** - The default port is '**17476**'.

***Note**: If a different port number is required, manual adjustment of the UTG configuration is required.*

- **Host Timeout** - This value cannot be empty. The recommended value is '**30**' seconds. Setting this value to '**0**' (zero) will equal no timeout.

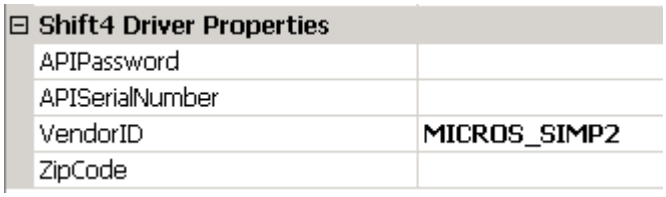
- **Primary Host** - The IP Address of the machine at the property that runs the UTG application. Use '**0.0.0.0**' so the actual IP address of the terminal at the property will be required when the override is defined.

- **Primary Host Port** - Port of the machine for Primary Host above. The default port is '**17476**'.

Note: If a different port number is required, manual adjustment of the UTG configuration is required.

Shift4 Driver Properties

11. In the Shift4 Driver Properties section, enter information in the following field:



- **VendorID** - This value defines the Interface Identifier required for Shift4 to recognize which interface is sending the message. Use '**MICROS_SIMP2**'.

12. Save your changes and close the Payment Drivers Enterprise tab.

Payment Device Configuration

In most cases the payment module will use devices (e.g., MSR, RFID) that are supported using the internal drivers for the input of payment card information. If this is the case, you may skip to the next section.

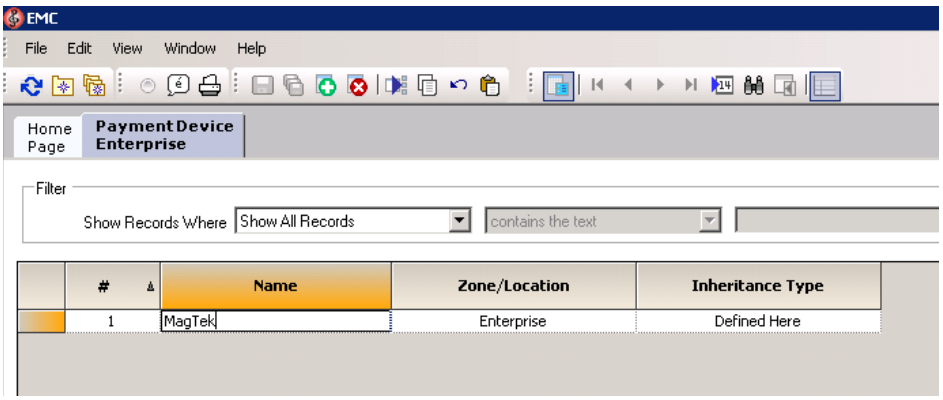
If the payment module will be utilizing a physical input device (MSR) that is not already supported as part of the Simphony POS, a custom device driver may have been created. A third-party device driver will be required to allow communications between the physical device and Simphony. Configure the device driver using the following instructions.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.

2. Navigate to **Setup tab | Payment Device**.

3. Add a new record for the device driver using the green Insert Record button (if it does not already exist).



4. Open the new driver, and then click the link called '**Import from a file**'.

5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**[3rdpartyprovider].dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:

Assembly/Class	
Assembly Name	SkeletonLoadableDevice.dll
Class Name	SkeletonLoadableDevice.SkeletonLoadablePaymentDevice
Description	**Magtek**
Device ID	**Magtek**
Display Name	**Magtek**

- **Description -** This value describes the Device Driver.
- **Device ID -** This is for internal use only. It is recommended that this value match the device (e.g., Magtek350M).
- **Display Name -** This value appears in the Device display drop-down list (e.g., MagTek).

9. Save your changes and close the Payment Device Enterprise tab.

Payment Module Configuration

Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Payments**.
3. Click the Credit Card payment record to open. If a payment record for Credit Cards has not been created, add it using the green Insert Record button.
4. Click the link called '**Import from a file**'.
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**Micros.Payment.LoadableCreditCardModule.dll**'.
6. Click the '**Open**' button.
7. Select the **Driver** from the drop-down list. If a payment driver was created in the previous steps, the display name of the driver will be shown here.
8. Select the **Device** from the drop-down list. This will default to '**Internal**', which is the value to use for all MICROS devices. If a device driver was created in the previous steps, the display name of the driver will be shown here.
9. Click the '**Configuratio**n' tab.

Common Properties

10. In the Common Properties section, enter information in the following fields:

Common Properties	
Allow Manual Authorization Credit Card	**True**
Allow Partial Settlement On Batch	**True**
Data Lifetime Seconds	**7200**
Default UI Element	
Do Not Batch	**False**
Encrypt Data	**True**
Log Level	**ALWAYS**
Manual Card Data Entry Retries	**5**
Offline Authorizations	**0**
Prompt For Manual Card Data Entry	**True**
Retry Authorization Reversals On Batch	**False**
Run As Service	**False**

- **Allow Manual Authorization Credit Card** - This indicates whether manual authorization of credit cards is allowed. Must be set to '**True**' for processors using the Shift4 driver.
- **Allow Partial Settlement On Batch** - Must be set to '**True**' for $$$ on the Net.
- **Do Not Batch** - Determines if the creation and settlement of the Batch will be performed within Simphony. Must be set to '**False**' for $$$ on the Net.
- **Encrypt Data -** Must be set to '**True**' for $$$ on the Net.
- **Manual Card Data Entry Retries -** This indicates the number of manual card retries that will be allowed. Must be set to at least '**1**'. Recommended value of '**5**'.
- **Offline Authorizations** - This indicates the number of offline authorizations allowed before the system will attempt to go online.
- **Prompt For Manual Card Data Entry** - This indicates whether manual card entry is allowed. Must be set to '**True**' for $$$ on the Net.

- **Retry Authorization Reversals On Batch** - Must be set to '**False**' for $$$ on the Net.
- **Run As Service** - Must be set to '**False**' for $$$ on the Net.

11. Save your changes and close the Payments Enterprise tab.

Property/Revenue Center Level Configuration

Configuration settings that are unique to the individual property or revenue center can now be defined.

1. In the Locations hierarchy, highlight the Property module.
2. Navigate to **Setup** tab **| Payment Drivers**.
3. Double-click the '**DOTN' driver** row to open.
4. Click the '**Override this record**' link, and then click the '**Yes**' button.
5. Click the '**Configuration**' tab.

Common Driver Properties

6. In the Common Driver Properties section, enter information in the following fields:

Common Driver Properties	
Bank Identification Number	
Batch Number	**1**
Merchant Number	**[Assigned by Shift4]**
Store Number	
Terminal Number	

- **Batch Number** - This value cannot be 0 (zero) or empty. Set to '**1**'.
- **Merchant Number** - This is the Merchant ID Number that is assigned by Shift4 for the property.

Transport Service Properties

7. Enter information in the following fields:

Transport Service Properties	
Batching Host	[IP Address of UTG in Hosting Center]
Batching Host Port	17476
Host Timeout	30
Primary Host	[IP Address of machine with UTG at Prop
Primary Host Port	17476

- **Batching Host** – The IP Address of the machine where the UTG application is installed at the MICROS Hosting Center.
- **Primary Host** – Set this to the IP Address of the machine that the UTG is installed on at the property.

Shift4 Driver Properties

8. In the Shift4 Driver Properties section, enter information in the following fields:

⊟ Shift4 Driver Properties	
APIPassword	[Provided by Shift4 - Property Specific]
APISerialNumber	[Provided by Shift4 - Property Specific]
VendorID	MICROS_SIMP2
ZipCode	[Provided by Shift4]

- **APIPassword** - Assigned by Shift4, this password is unique to the property and is paired with the APISerialNumber.
- **APISerialNumber** - Assigned by Shift4, this serial number is unique to the property and is paired with the APIPassword**.**
- **ZipCode** - This is the zip code of the property that is assigned by Shift4.

9. Save your changes and close the Payment Drivers tab for your current level in hierarchy.

Configure Autosequence

The PC Autosequence feature may optionally be used to set up automatic event tasks, such as nightly batching. Once the PC Autosequence event has been created, it can be scheduled to run repeatedly at specific frequencies or time intervals.

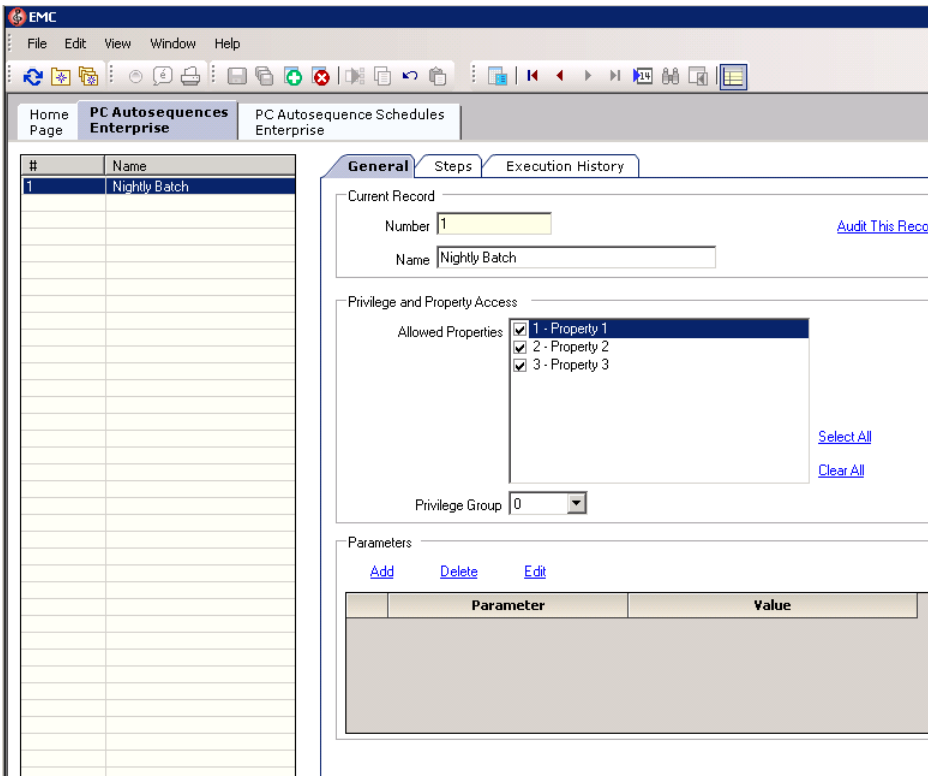
Create Autosequence Event

Autosequences may only be configured at the Enterprise level.

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Configuration tab | PC Autosequences**.
3. Add a new record for the autosequence event using the green Insert Record button (if it does not already exist).
4. Double-click on the row to open the new autosequence record.
5. Click the '**General**' tab.

Privilege and Property Access

6. In the Privilege and Property Access section, select information for the following fields:



- **Allowed Properties** - Check (enable) each property that is to be included in the autosequence event run.
- **Privilege Group** - If desired, select the employee group that will be granted privileges to run the autosequence event.

Parameters (optional)

To optionally restrict the execution of the autosequence event, complete the steps in the section below.

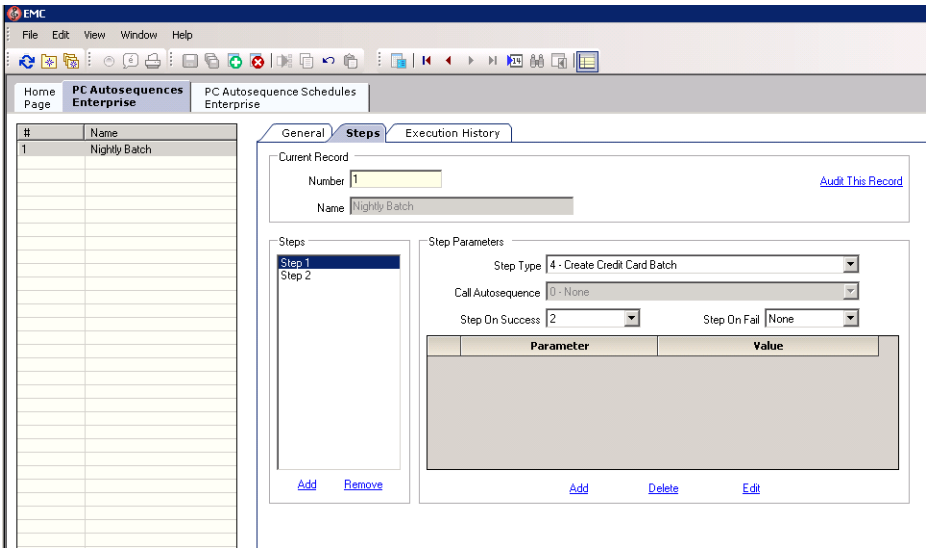
7. In the Parameters section, click the '**Add**' link.

8. Add the desired parameter(s) with values.

Autosequence Event Steps

9. Click the '**Steps**' tab.

10. Under the Steps section, click '**Add**' to add step 1 of the autosequence event.



11. In the Step Parameters section, select the **Step Type** from the drop-down list.

12. Under the Steps section, click '**Add**' again to add step 2 of the autosequence event.

13. Select the **Step Type** from the drop-down list.

14. Repeat to add each step required to run the autosequence event.

15. For each step, select the outcomes:

- **Step on Success** - Select the step number that should occur next if a step succeeds. For example, after step 1 runs successfully, then proceed to step 2.
- **Step on Failure** - Select the step number that should occur next if a step fails. For example, if step 1 fails, do not proceed with any other steps.

16. Once all steps have been added, save your changes and close the PC Autosequences Enterprise tab.

PC Autosequence Schedules

17. In the Locations hierarchy, highlight the Enterprise module.

18. Navigate to **Configuration tab | PC Autosequence Schedules**.

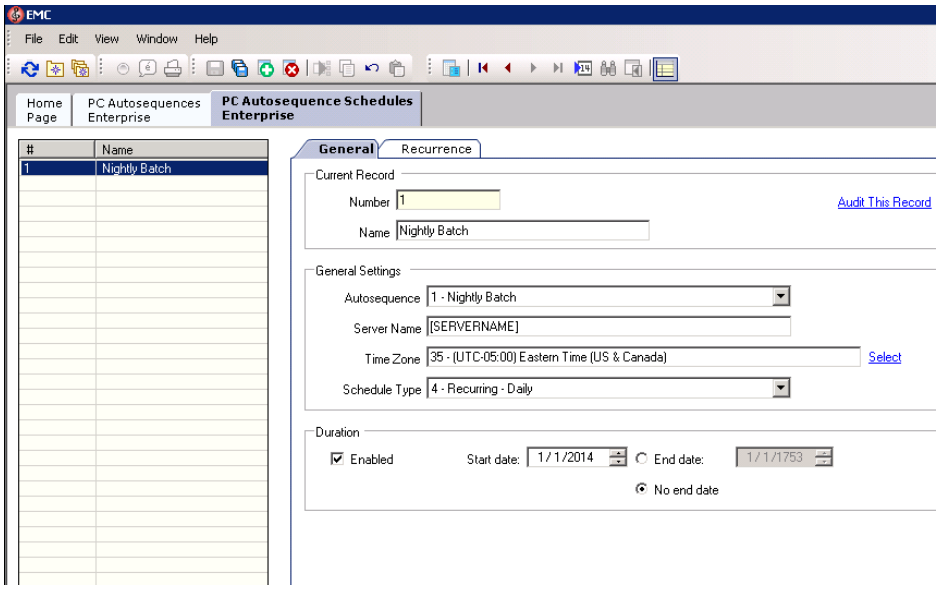
19. Add a new record for the autosequence schedule using the green Insert Record button (if it does not already exist).

20. Double-click to open the new autosequence schedule record.

21. Click the '**General**' tab.

General Settings

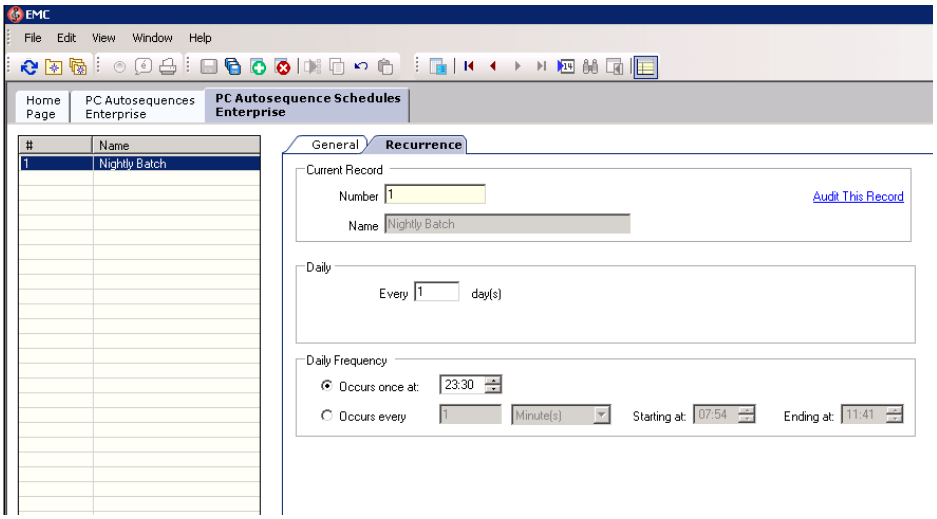
22. In the General Settings section, select information for the following fields:



- **Autosequence** - Select the desired autosequence event from the drop-down list.
- **Server Name** - Enter the name of the server located at the Hosting Center.
- **Time Zone** - Select the time zone of the Hosting Center.
- **Schedule Type** - Select the frequency for the autosequence event.
- **Duration** - The '**Enabled**' box must be checked in order for the autosequence event to run. Also, select the Start and End dates for the autosequence event.

Recurrence

23. Click the '**Recurrence**' tab.



24. In the Daily section, enter the number of day(s) for the autosequence event to reoccur. For example, to run the event daily, set this value to Every 1 day(s).

25. In the Daily Frequency section, set the time(s) for the autosequence event to run.

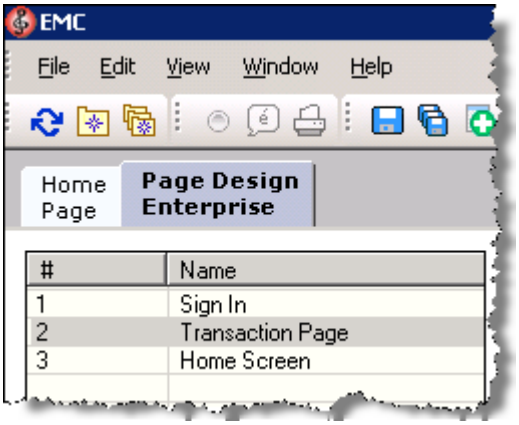
26. Save your changes and close the PC Autosequence Schedules Enterprise tab.

Screen Design Configuration

The instructions below explain how to set up the FOH screen and button(s) for use with the payment card driver.

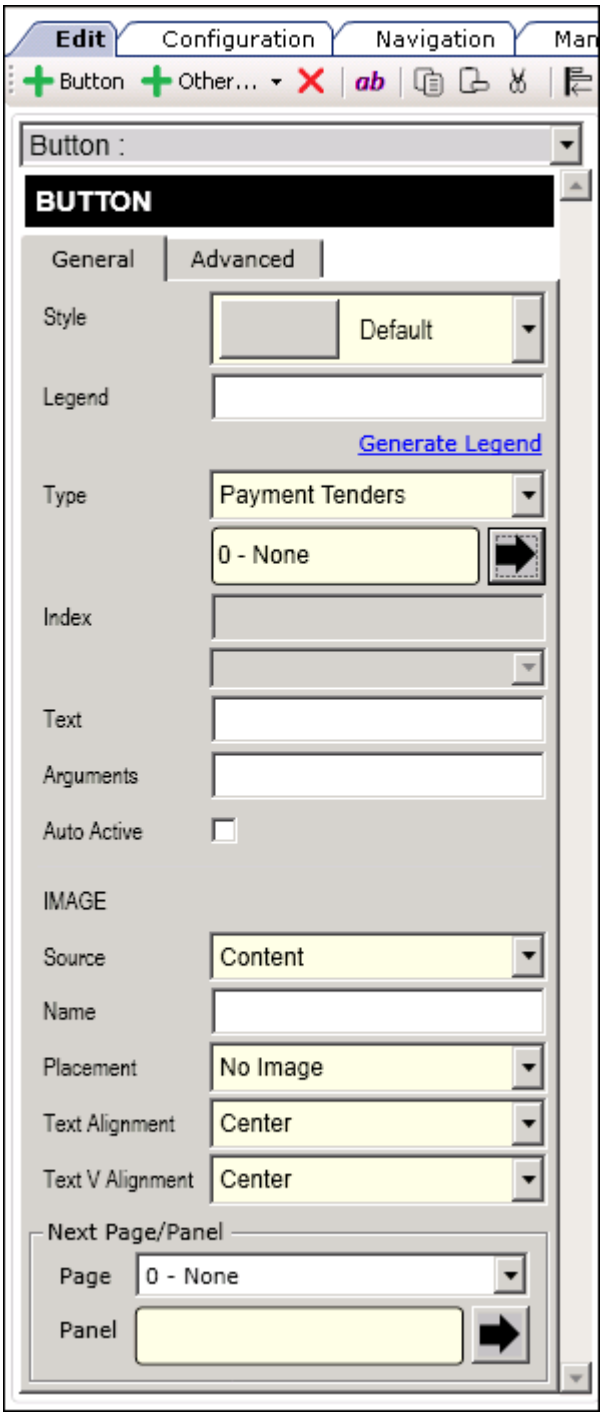
1. Open the EMC application in Simphony and log in.
2. Highlight the Enterprise module.
3. Navigate to **Configuration tab | Page Design**.
4. Double-click the row of the desired page/screen to open it.

***Note**: The screenshots below depict a Transaction Page as the example. Your system will likely have a different page or screen name for the buttons.*



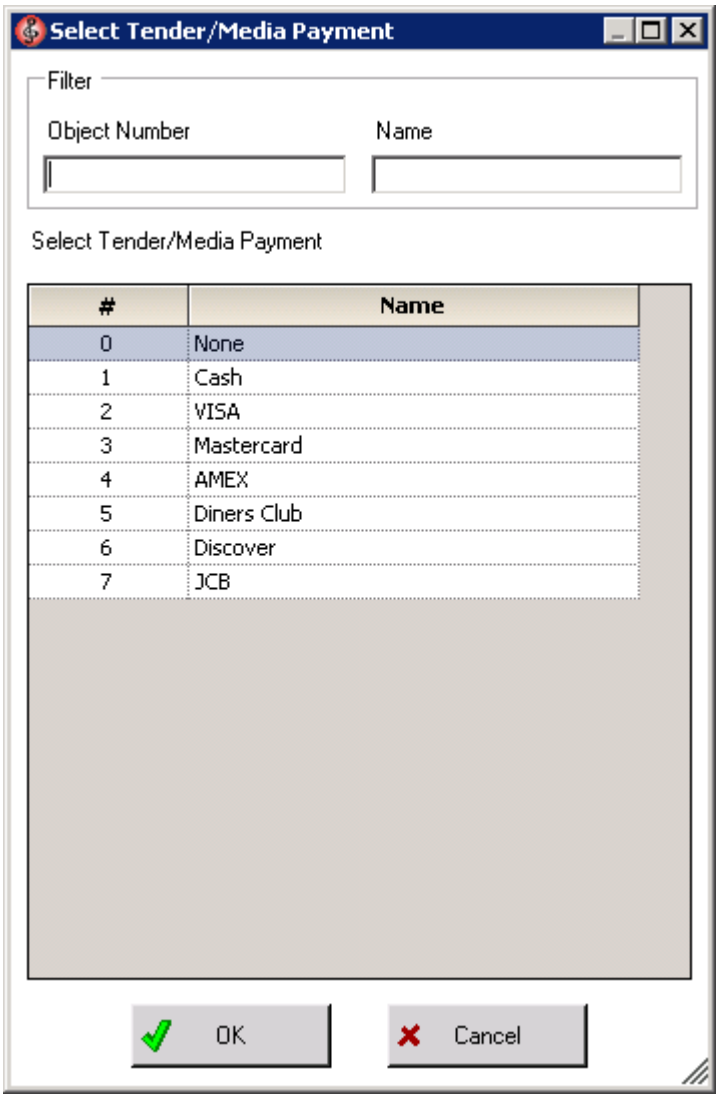
5. On the Edit tab, click '**Payments**'.
6. Click the Insert (+) button.

7. In the General tab select '**Payment Tenders**' from the Type drop-down.



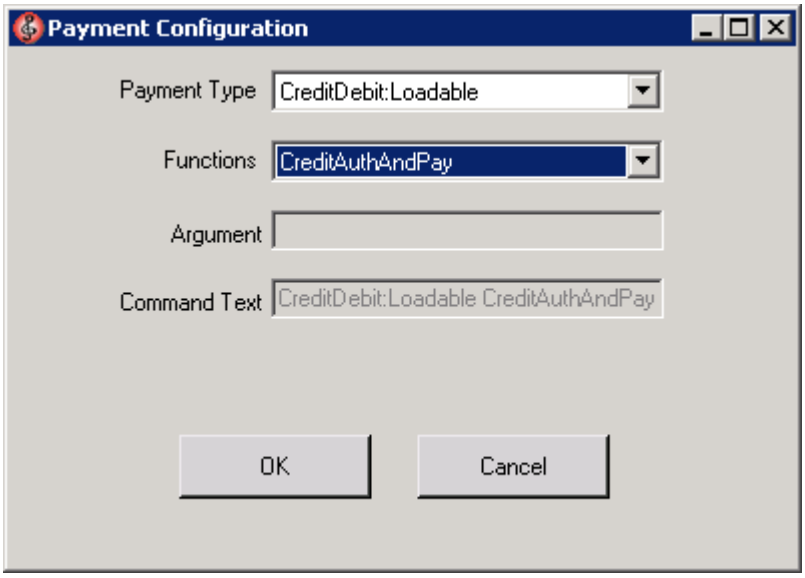
8. Directly under the Payment Tenders drop-down, click the black arrow.

9. On the *Select Tender/Media Payment* window, select '**None**' or the desired payment tender, and then click the '**OK**' button.



***Note**: If you want all types of credit cards to be used, select 'None'. Otherwise, select the desired payment tender and repeat steps 9-13 for each type of payment tender.*

10. On the *Payment Configuration* window, select '**CreditDebit:Loadable**' for the Payment Type and your desired function in the Functions drop-down list. Click the '**OK**' button.



11. Position and size the button wherever you want to place it on the FOH screen.

12. In the Legend field, type the name of the button.

13. Repeat for any additional supported functions.

14. Save your changes and close the Page Design Enterprise tab.

15. Restart the Ops client(s) in order for the screen design changes to display on the workstation(s).

Shift Tracking

This article discusses the usage and configuration of the Shift Tracking feature.

Contents

- 1 Overview
  - 1.1 EMC Configuration
    - 1.1.1 Enabling Shift Tracking
  - 1.2 Role Privileges
  - 1.3 Control Parameters
  - 1.4 RVC Parameters
  - 1.5 Page Design
- 2 Usage
  - 2.1 Shift Reports
  - 2.2 Shift Incrementing
  - 2.3 Incrementing Shifts Manually
    - 2.3.1 Incrementing Employee/Cashier Shift
    - 2.3.2 Incrementing Shifts of another Employee
- 3 See also

Overview

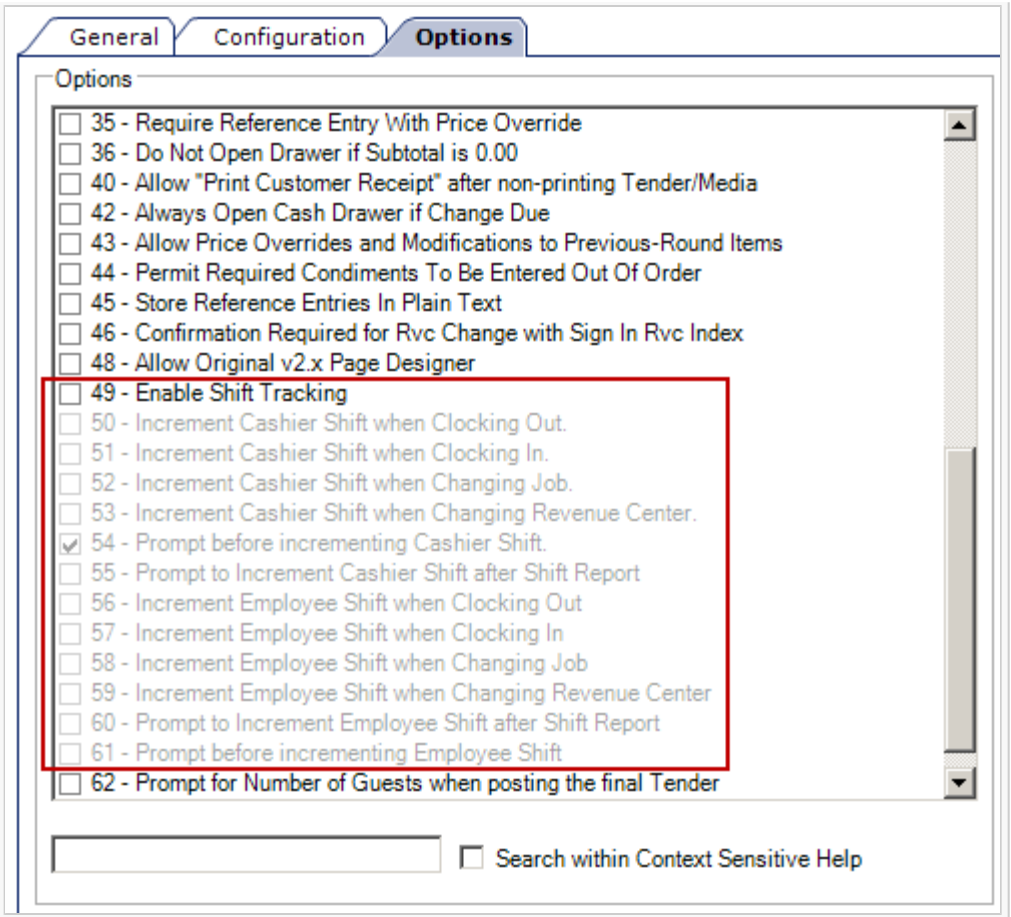
Service personnel may work on a shift basis. A shift is the period of time that service personnel is scheduled to work. Many service personnel may volunteer or are scheduled to work more than one shift. “Shift Tracking” is a reporting feature that provides the ability to post service personnel or Cashier totals to “shifts” to account for the multiple shifts worked during a single Business Day.

EMC Configuration

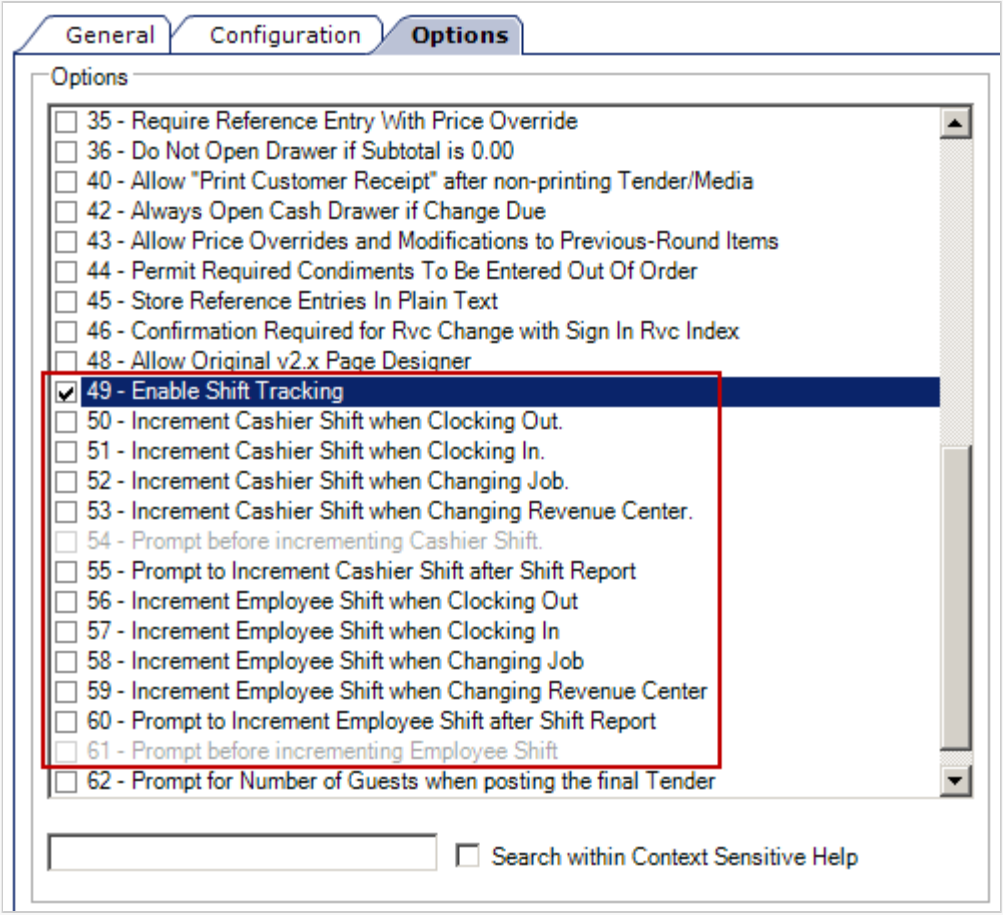
Enabling Shift Tracking

The Control Parameters option **[49 - Enable Shift Tracking]** enables the Shift Tracking feature. Enabling option **[49 - Enable Shift Tracking]** makes

all of the options related to the Shift Tracking feature available in the EMC. The option may be enabled via *EMC-> <Enterprise level / Property / Revenue Center>-> Setup tab-> Parameters-> Control Parameters->* ***Options tab***.



When option **[49 - Enable Shift Tracking]** is Disabled.



When option **[49 - Enable Shift Tracking]** is Enabled.

Role Privileges

*Navigation: EMC-> Enterprise level-> Configuration tab-> Personnel-> **Roles***

Only authorized Users may Increment Shifts when Clocking In, Clocking Out, changing Jobs, and changing RVCs. The following options have been added to the Roles module in EMC:

30007 - Increment Cashier Shift for Another Employee

*Enable this option for Employees associated with this Role to Increment the Cashier Shifts for another Cashier using the **[Increment Cashier Shift for Another Employee]** key. If not set, Employees associated with this Role cannot Increment Shifts for another Cashier.*

30008 - Increment Employee Shift

*Enable this option for employees associated with this Role to Increment their Employee Shift using the **[Increment Employee Shift]** key. If not set, Employees associated with this Role cannot use the **[Increment Employee Shift]** Key to Increment their Employee Shift.*

30009 - Increment Cashier Shift

*Enable this option for employees associated with this Role to Increment their Cashier Shift using the **[Increment Cashier Shift]** key. If not set, Employees associated with this Role cannot use the **[Increment Cashier Shift]** key to Increment their Cashier Shift.*

30011 - Increment Employee Shift when Clocking Out

If enabled, the Employee's Shift will increment when Clocking Out. This does not apply if the Employee is Clocking Out on a Break. If not set, the Shift for the Employee will remain the same.

30012 - Increment Employee Shift when Clocking In

If enabled, the Employee's Shift will Increment when Clocking In. This does not apply if the Employee is returning from a Break. If not set, the Shift for the Employee will remain the same.

30013 - Increment Employee Shift when Changing Job

If enabled, the Employee's Shift will Increment when Clocking In with a different Job. This Clock In occurs automatically if the Employee Signs In to a UWS with a different Revenue Center than the Job in which they are currently Clocked In to. If not set, the Employee's Shift will not Increment during this Clock In cycle.

30014 - Increment Employee Shift when Changing Revenue Center

If enabled, the Employee's Shift will Increment when they sign in to a different Revenue Center. If not set, the Employee's Shift will not Increment when signing in to a different Revenue Center.

30015 - Prompt before incrementing Employee Shift

If enabled, the Employee will be prompted whether to Increment the Shift of the Employee when the Shift is set to Increment when Clocking In or Out, changing Jobs or changing Revenue Centers. If not set, the Employee will not be prompted when the Employee Shift is set to Increment through one of those methods.

30016 - Prompt to Increment Employee Shift after Shift Report

If enabled, when an Employee Shift Report is generated with a Shift scope, the Operator will be prompted to Increment the Employee Shift if needed. If not set, the Operator will not be prompted and the Employee Shift will not Increment.

30037 - Increment Employee Shift for Another Employee

*Enable this option for Employees associated with this Role to Increment Employee Shifts (for another Employee) using the **[Increment Employee Shift for Another Employee]** Function key. If not set, Employees associated with this Role cannot Increment Shifts for another Employee.*

30063 - Increment Cashier Shift when Clocking Out

If enabled, the Shift for the Cashier associated with the Clock Out Employee will Increment. This does not apply if the Employee is Clocking Out on a Break. If not set, the Shift for the Cashier associated with the Employee will remain the same.

30064 - Increment Cashier Shift when Clocking In

If enabled, the Shift for the Cashier associated with the Employee Clocking In will Increment. This does not apply if the Employee is returning from a Break. If not set, the Shift for the Cashier associated with the Employee will remain the same.

30065 - Increment Cashier Shift when Changing Job

If enabled, the Shift for the Cashier associated with the Employee will Increment when they Clock In with a different

Job. This Clock In occurs automatically if the Employee Signs In to a UWS with a different Revenue Center than the Job in which they are currently Clocked In to. If not set, the Shift for the Cashier associated with the Employee will not Increment during this Clock In cycle.

30066 - Increment Cashier Shift when Changing Revenue Center

If enabled, the Shift for the Cashier associated with the Employee will Increment when they Sign In to a different Revenue Center. If not set, the Shift for the Cashier associated with the Employee will not Increment when Signing In to a different Revenue Center.

30067 - Prompt to Increment Cashier Shift after Shift Report

If enabled, when a Cashier Shift report is generated with a Shift scope, the Operator will be prompted whether or not the Cashier Shift should be incremented. If not set, no prompting will occur and the Cashier Shift will not Increment.

30068 - Prompt before incrementing Cashier Shift

If enabled, the Employee will be prompted whether or not to Increment the Shift for the Cashier associated with the Employee when the Shift is set to Increment when Clocking In or Out, changing Jobs or changing Revenue Centers. If not set, no prompting will occur when the Cashier Shift is set to Increment through one of these methods.

Control Parameters

Navigation: EMC-> <Enterprise / Property / Revenue Center>-> Setup tab-> Parameters-> ***Control Parameters***

49 - Enable Shift Tracking

If set, Shift Reporting is activated and provides the ability to segregate Employee, Employee Tip and Cashier Financial totals by Shift. If not set, Employee, Employee Tip and Cashier totals will accumulate in a single total set. See RVC Parameters | Calendar for Shift Reporting reset options.

The following Control Parameters dictate when Shift Incrementing should occur. When an Employee or Cashier triggers a Shift Incrementing action defined by the Control Parameters, their Shift is automatically incremented. However, if the corresponding Role privileges are not enabled, the Employee or Cashier will be prompted for authorization.

For example, If the Control Parameters Option **[52 - Increment Cashier Shift when Changing Job]** is enabled and the Roles option **[30065 - Increment Cashier Shift when Changing Job]** is disabled, when a Cashier changes jobs, the Workstation will prompt for authorization.

50 - Increment Cashier Shift when Clocking Out

If enabled, the shift of the Cashier will Increment when Clocking Out. This does not apply if the Employee is Clocking Out on a Break. If not set, the Shift for the Cashier associated with the Employee will remain the same.

51 - Increment Cashier Shift when Clocking In

If enabled, the Shift of the Cashier will increment when Clocking In. This does not apply if the Employee is returning from a Break. If not set, the Shift for the Cashier associated with the Employee will remain the same.

52 - Increment Cashier Shift when Changing Job

If enabled, the Shift of the Cashier will Increment when they Clock In with a different Job. This Clock In occurs automatically if the Employee Signs In to a UWS with a different Revenue Center than the Job in which they are currently Clocked In to. If not set, the Shift of the Cashier associated with the Employee will not Increment during this Clock In cycle.

53 - Increment Cashier Shift when Changing Revenue Center

If enabled, the Shift of the Cashier will Increment when they Sign In to a different Revenue Center. If not set, the Shift for the Cashier associated with the Employee will not Increment when Signing In to a different Revenue Center.

56 - Increment Employee Shift when Clocking Out

If enabled, the Employee's Shift will Increment when Clocking Out. This does not apply if the Employee is Clocking Out on a Break. If not set, the Employee's Shift will remain the same.

57 - Increment Employee Shift when Clocking In

If enabled, the Employee's Shift will Increment when Clocking In. This does not apply if the Employee is returning from a Break. If not set, the Employee's Shift will remain the same.

58 - Increment Employee Shift when Changing Job

If enabled, the Employee's Shift will Increment when they Clock In with a different Job. This Clock In occurs automatically if the Employee Signs In to a UWS with a different Revenue Center than the Job in which they are currently Clocked In to. If not set, the Employee's Shift will not Increment during this Clock In cycle.

59 - Increment Employee Shift when Changing Revenue Center

If enabled, the Employee's Shift will Increment when Signing In to a different Revenue Center.

The following Control Parameters dictate when to prompt Employees/Cashiers to Increment the Shift.

54 - Prompt before incrementing Cashier Shift

If enabled, the Employee will be prompted whether or not to Increment the Shift for the Cashier when Clocking In/Out, changing Jobs or changing Revenue Centers. If not set, the Employee will not be prompted when the Cashier Shift is set to Increment through one of these methods.

55 - Prompt to Increment Cashier Shift after Shift Report

If enabled, when a Cashier Shift Report is generated with a Shift scope, the Operator will be prompted whether or not to Increment the Cashier Shift. If not set, the Operator will not be prompted and the Cashier Shift will not be incremented.

60 - Prompt to Increment Employee Shift after Shift Report

If enabled, when an Employee Shift Report is generated with a Shift scope, the Operator will be prompted whether or not to Increment the Employee Shift. If not set, the Operator will not be prompted and the Employee's Shift will not Increment.

61 - Prompt before incrementing Employee Shift

If enabled, the Employee will be prompted whether or not to Increment the Shift for the Employee when the Shift is set to Increment when Clocking In or Out, changing Jobs or changing Revenue Centers. If not set, the Employee

will not be prompted when the Employee Shift is set to Increment through one of these methods.

RVC Parameters

*Navigation: EMC-> Revenue Center level-> Setup tab-> Parameters-> **RVC Parameters***

Do Not Reset Employee Financial Shifts with the Start of each business Day

*Enable this option to prevent Employee Financial Shifts from resetting with the Start of each business day (SOD). This option may be used when an Employee Shift spans through a Start of a new business day. The Control Parameters option **[49 - Enable Shift Tracking]** must be enabled for this RVC, either through override or inheritance from a higher level, i.e., Enterprise, Zone or Property.*

Do Not Reset Cashier Financial Shifts with the Start of each business Day

*Enable this option to prevent Cashier Financial Shifts from resetting with the Start of each business day (SOD). This option may be used when an Employee Financial Shift spans through a Start of a new business day. The Control Parameters option **[49 - Enable Shift Tracking]** must be enabled for this RVC, either through override or inheritance from a higher level i.e., Enterprise, Zone or Property.*

Page Design

The following Function keys can be added from the *EMC-> <Enterprise / Property / Revenue Center>-> Configuration tab-> User Interface-> Content-> **Page Design*** module to provide Employees, Cashiers and privileged Employees the ability to manually Increment Employee/Cashier Shifts via the Workstation.

Increment Employee Shift

When this Function key is used, the Workstation will Increment the Shift for the Signed In Operator. The Role privilege **[30008 - Increment Employee Shift]** must be enabled for an Employee to use this Function key.

Increment Employee Shift for Another Employee

Privileged Employees may use this Function key to Increment the Shift of another Employee. The Role privilege **[30037 - Increment Employee Shift for Another Employee]** must be enabled for an Employee to use this Function key.

Increment Cashier Shift

When this Function key is used, the Workstation will Increment the Shift for the Cashier associated with the Signed In Operator or the Cashier associated with the Workstation. The Role privilege **[30009 - Increment Cashier Shift]** must be enabled for a Cashier to use this Function key.

Increment Cashier Shift for Another Employee

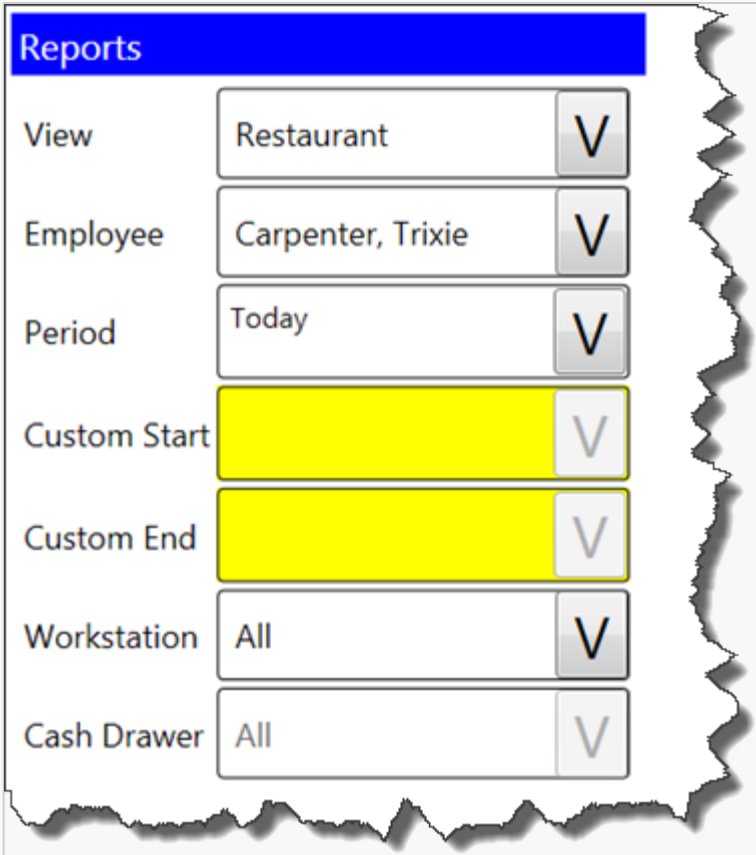
Privileged Employees may use this Function key to Increment the Shift of Cashiers. The Role privilege **[30007 - Increment Cashier Shift for Another Employee]** must be enabled for a Cashier to use this Function key.

Usage

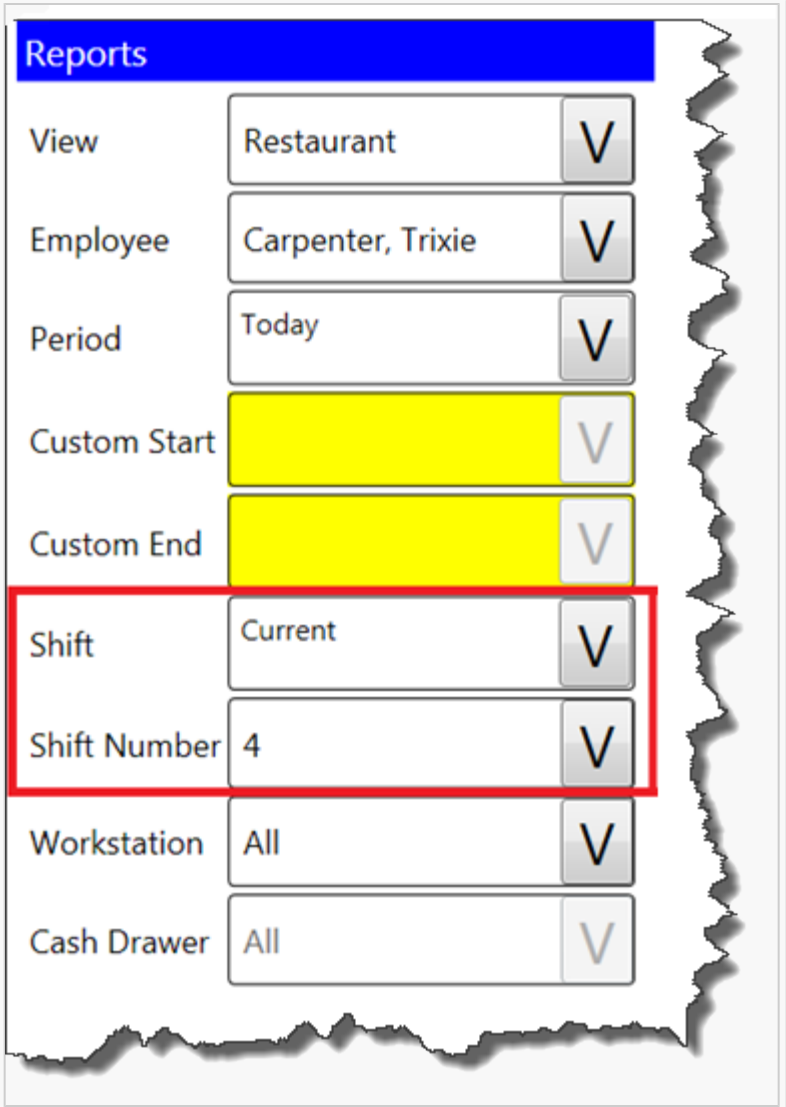
Shift Reports

With the release of Simphony v2.x, the following Employee and Cashier Reports support Shift Reporting:

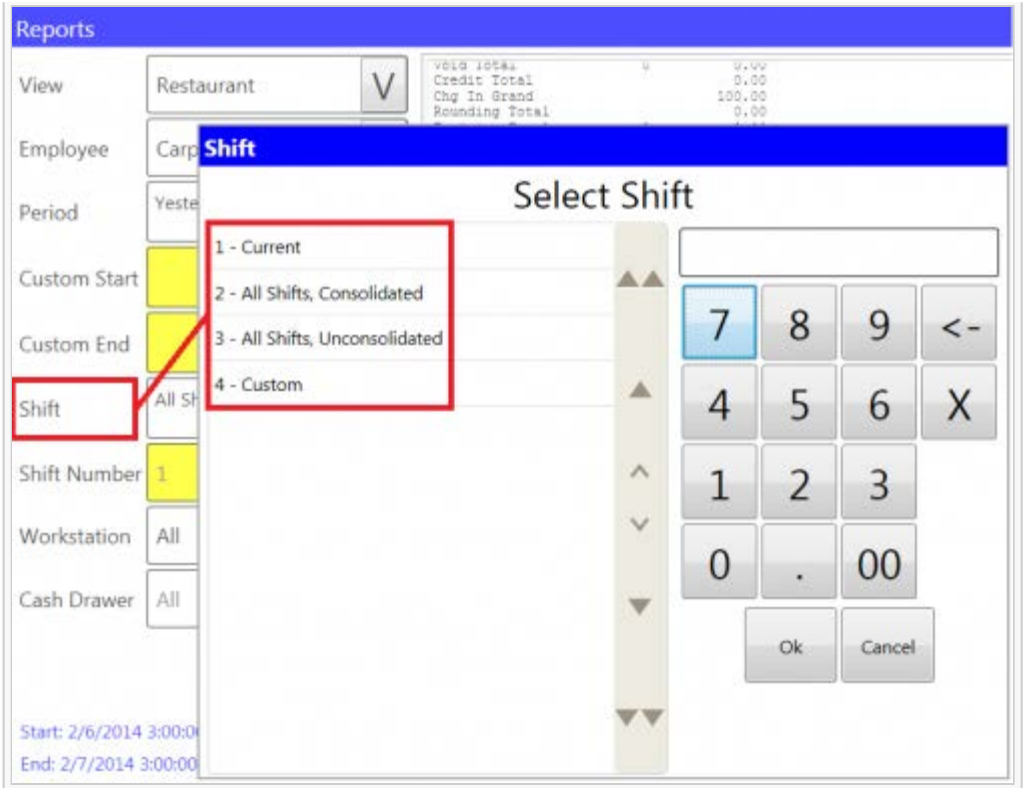
- Employee Financial Report
- Employee Financial VAT Report
- Employee Tip Report
- Cashier Financial Report
- Offline Cashier Financial Report
- Offline Employee Financial Report



By default, Shift Filtering option are not visible as the option **[49 - Enable Shift Tracking]** is Disabled.



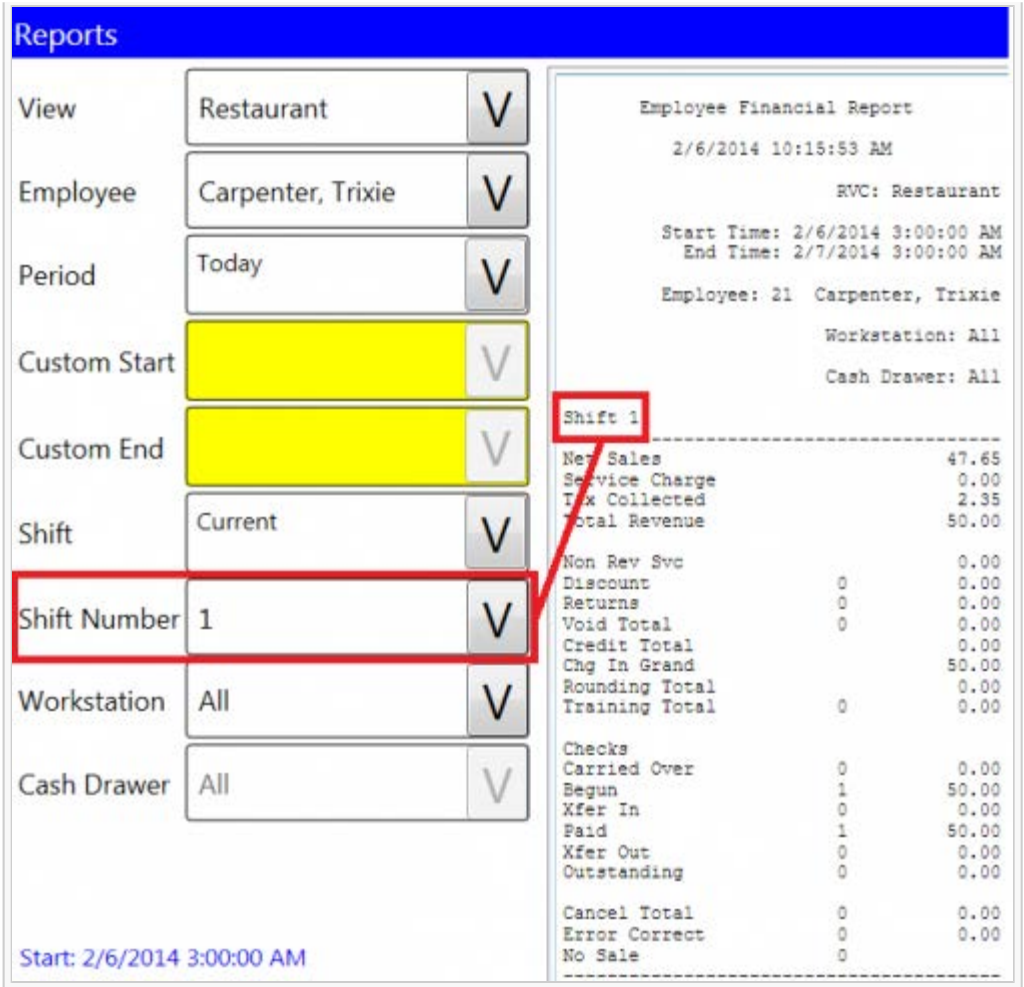
Enabling the Shift Tracking feature adds the Shift filtering options to the selection screen of Employee and Cashier Reports.



Types of Shift Filters

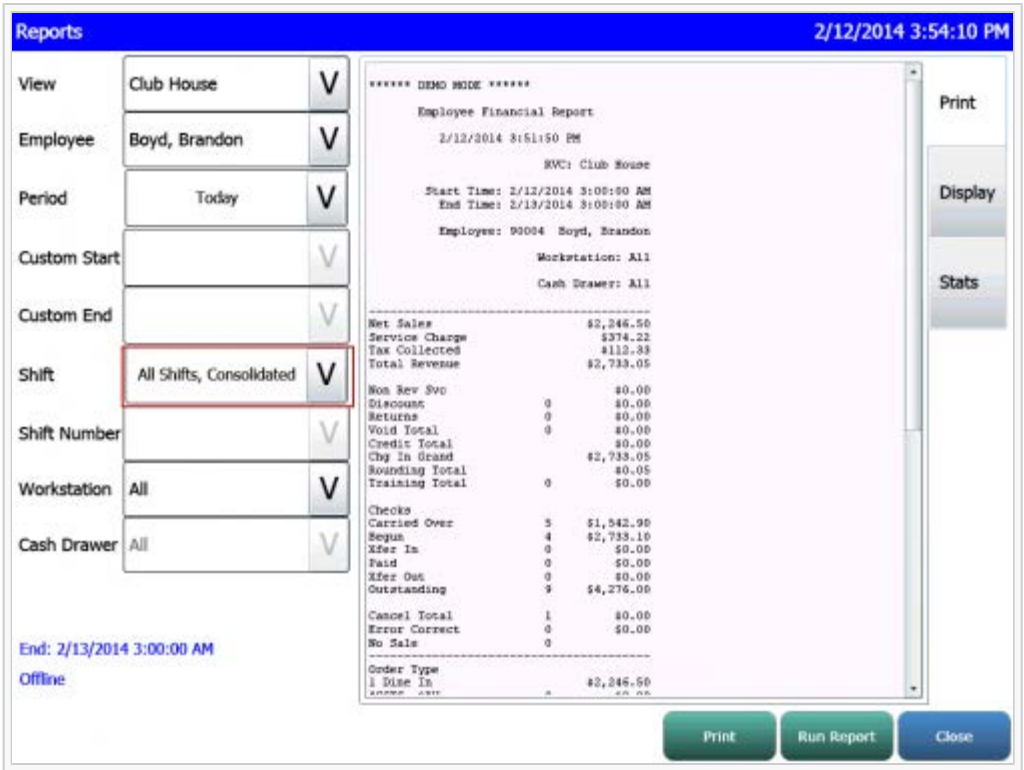
The available filtering options are:

- **Current** – Selected by default. Limits the Report scope to the current Shift.



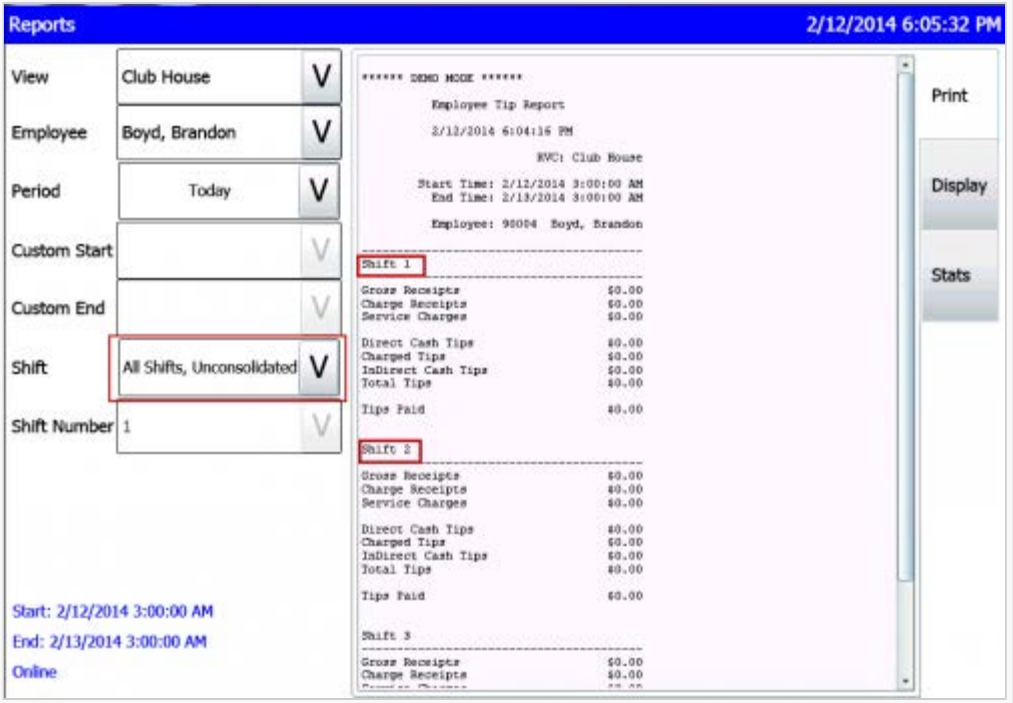
The Shift number is designated in the Report Header.

- **All Shifts, Consolidated** – When selected, the Report displays the financial information for all Shifts. The Report will not separate information by Shift.



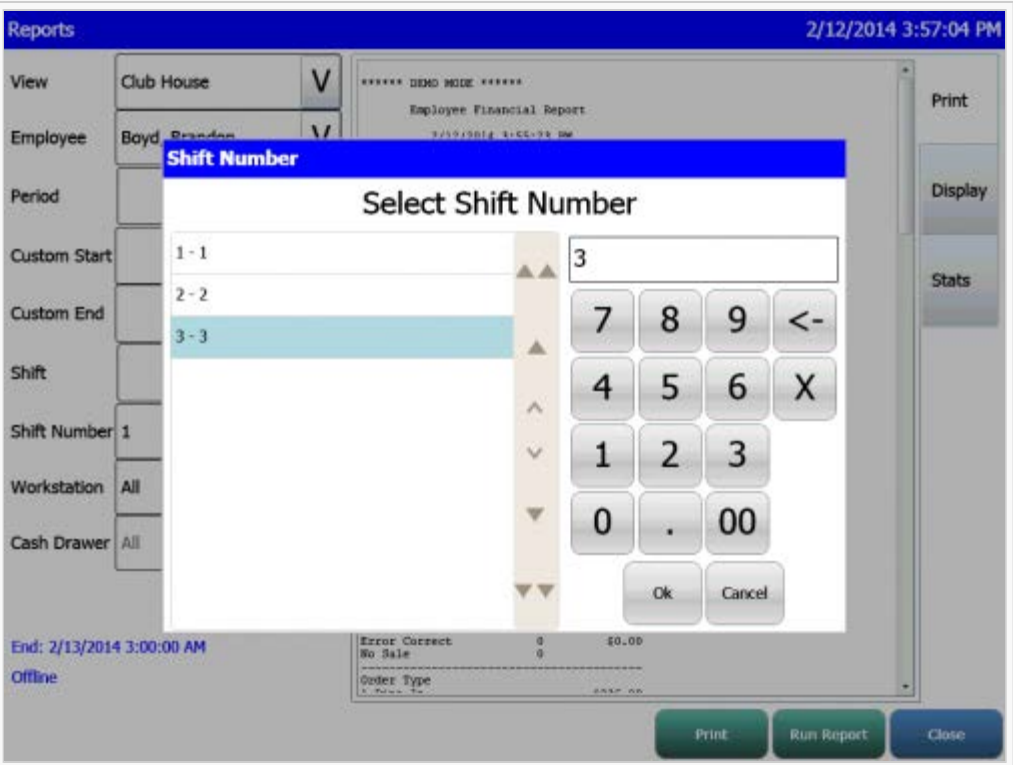
All Shifts, Consolidated Report View.

- **All Shift, Unconsolidated** – When selected, the Report displays the financial information for all Shifts. The report will display a separate section for each Shift.

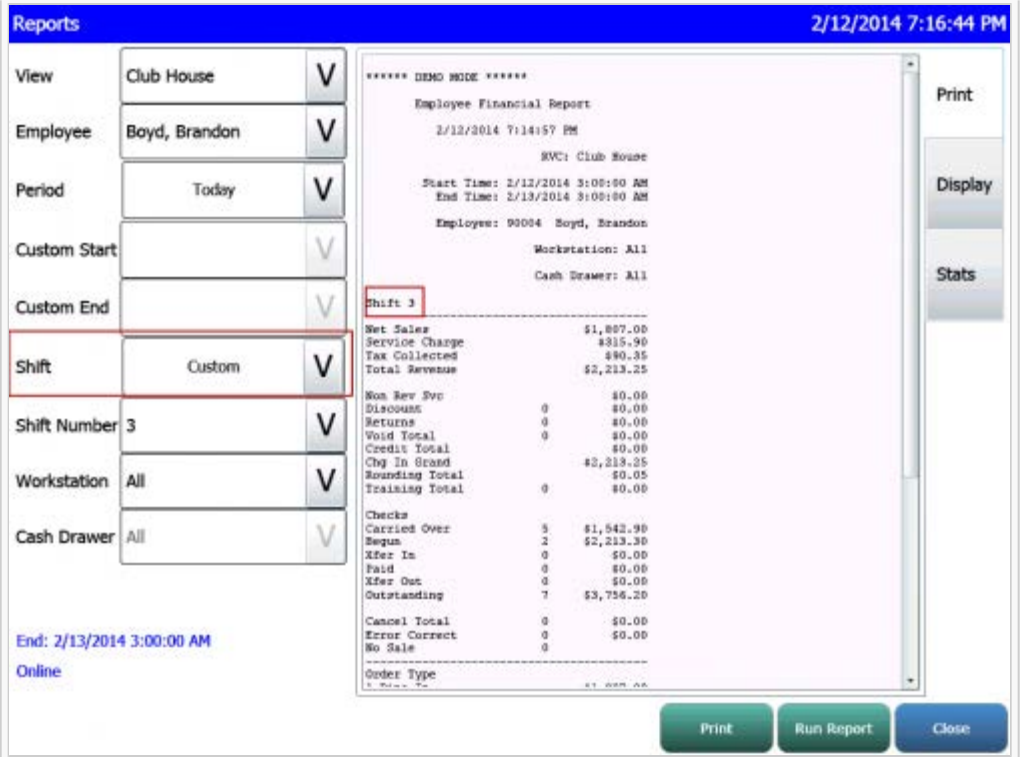


All Shift, Unconsolidated Report View.

- **Custom** – When selected, the Report displays only the financial information of the selected Shift.



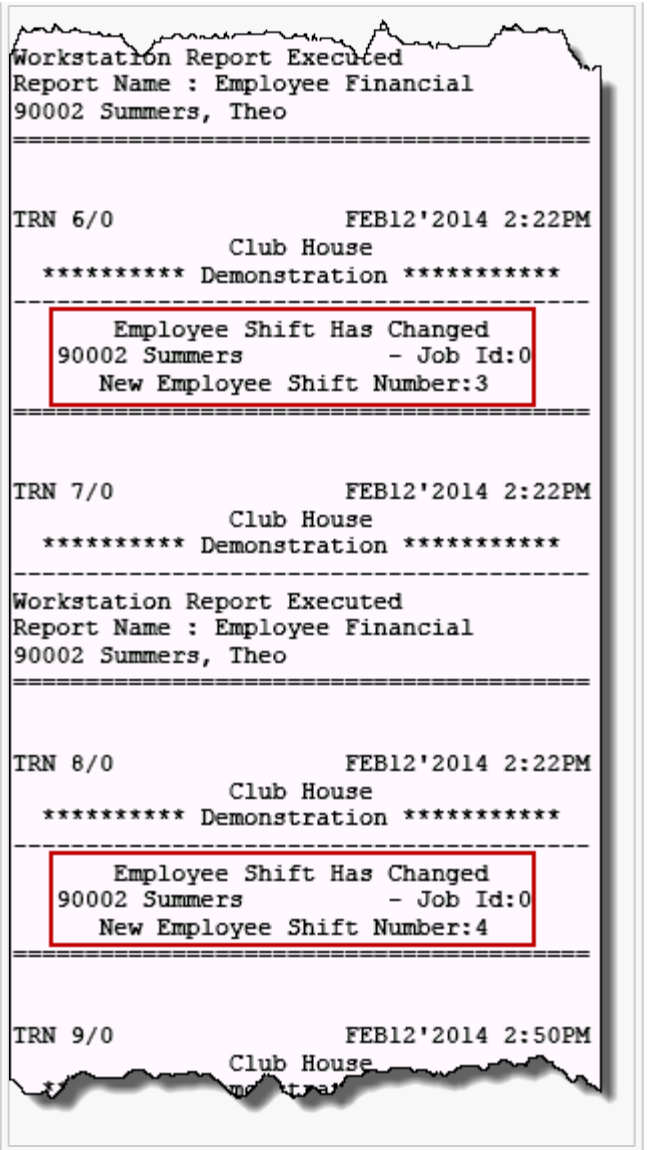
Custom Shift selection dialog.



Custom View.

No new reports have been introduced to mymicros.net or mylabor for Shift Reporting. However, Shift information is sent to mymicros.net so users may utilize the Shift data for custom reports or exports, while Shift information is sent to mylabor with Clock In/Out.

Additionally, Employee and Cashier Shift changes are written to the Workstation Journals.



Employee Journal Reportshows the Shift Changes

Shift Incrementing

In a situation where Employees/Cashiers works split shifts or double Shifts, Employees/Cashiers or a privileged Employee may need to Increment their Shift to reset the Employee/Cashier Financial Report back to 0.00 before the next Shift. For example, Operator John works the lunch Shift at a restaurant from 10 AM to 3 PM. He then works the night Shift at the restaurant from 6 PM to 2 AM. When the Shift Tracking feature is enabled, John will be prompted to Increment his Shift when Clocking In for the night Shift.

When an Employee/Cashier begins the day, they are assigned to Shift 1 by default. If configured, the Shift is incremented and the subsequent transaction activity will be reflected in the new Shift (Shift 2). If the Shift was not incremented, all totals are posted to the first Shift.

Shifts may be configured to automatically Increment in the following scenarios:

- With the Start of Day
- When Clocking In
- When Clocking Out

- When changing Jobs
- When changing Revenue Centers (RVC)
- When running a Shift Report

Employees and Cashiers may also manually Increment their Shifts while privileged Employees may Increment Shifts for other Employees and Cashiers via the Workstation keys. See the Incrementing Shifts Manually section for details.

Incrementing Shifts Manually

Employees and Cashiers may manually Increment their Shifts while privileged Employees may Increment Shifts for other Employees and Cashiers using the following Function keys:

- **[Increment Employee Shift]**
- **[Increment Employee Shift for Another Employee]**
- **[Increment Cashier Shift]**
- **[Increment Cashier Shift for Another Employee]**

Incrementing Employee/Cashier Shift

To perform an Employee and/or Cashier Shift Increment, the following Role Privileges should be enabled.

- **[30008 - Increment Employee Shift]**
- **[30009 - Increment Cashier Shift]**

To Increment the Shift of the Signed In Employee/Cashier:

1. Sign In to the Workstation.
2. If you are an Employee, press the **[Increment Employee Shift]** key. If you are a Cashier, press the **[Increment Cashier Shift]** key.
3. A confirmation message is displayed. Press **Yes** to confirm.

Shift Increment Confirmation Prompt.

A message is displayed verifying the Shift Increment.

Shift Increment Confirmation Message.

Incrementing Shifts of another Employee

Employees with the following Role privileges may Increment the Shift of other Employees and/or Cashiers.

- **[30037 - Increment Employee Shift for Another Employee]**
- **[30007 - Increment Cashier Shift for Another Employee]**

However, privileged Employees cannot Increment Shift of an Employee or Cashier if the Employee or Cashier is in the middle of a Transaction. If a privileged Employee attempts to do so, the following message will be displayed.

There is a Transaction in Progress

To Increment the Shift of another Employee or Cashier:

1. Sign In to the Workstation.
2. Press the **[Increment Employee Shift for Another Employee]** or the **[Increment Cashier Shift for Another Employee]** Function key.
3. A list of Employees or Cashiers will be displayed.

- If the **[Increment Employee Shift for Another Employee]** key is pressed, the Select Employee dialog will be displayed.

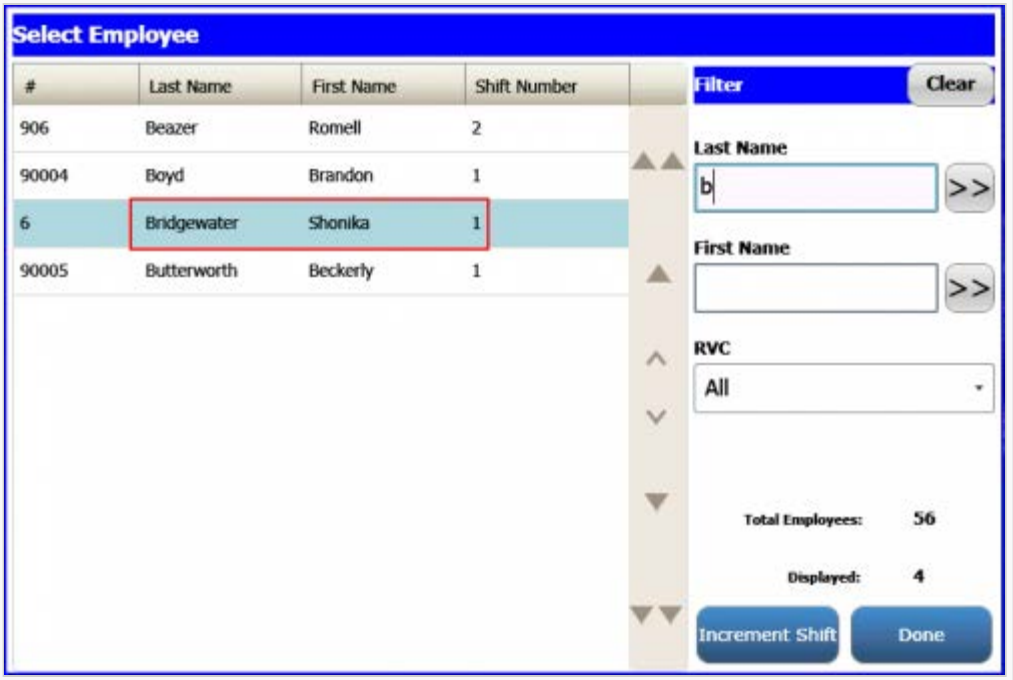
Select Employee dialog.

- If the **[Increment Cashier Shift for Another Employee]** key is pressed, the Select Cashier dialog will be displayed.

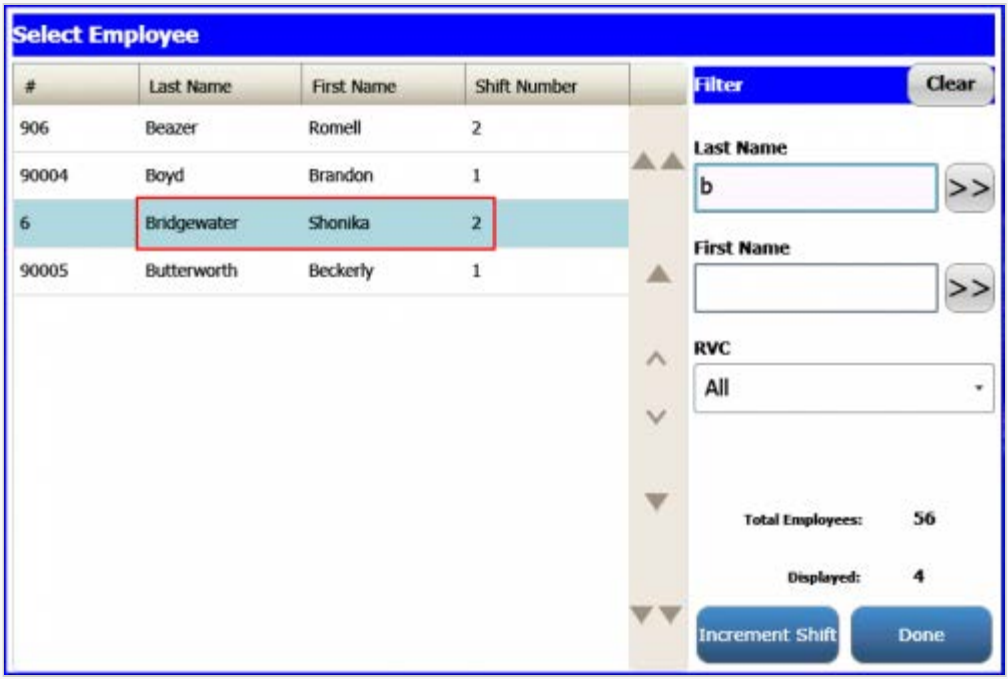
Select Cashier dialog.

Users may sort and/or filter the Employees/Cashiers by Last Name, First Name and the Revenue Center.

4. Select an Employee/Cashier and press the **Increment Shift** button.



Before Increment



After Increment

Simphony iOS Configuration

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- 1 iOS™ on Simphony™ v2
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    - 1.1.2 Operating Systems
      - 1.1.2.1 Guided Access
  - 1.2 Application Functionality Support
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  - 1.7 Device-Specific Configuration Constraints
- 2 Point of Service Client Functionality
  - 2.1 Network Configuration Requirements
    - 2.1.1 Wireless Network
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    - 2.1.3 Disable Standby Mode
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  - 2.3 MICROS Uploads and Signs the Simphony POS Client Application
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    - 2.3.2 Upgrading the iOS Client
    - 2.3.3 Annual Application Resigning

This article belongs to the MICROS **iOS functionality** category.

This article discusses functionality that relates to **Simphony v2.x**.

This article discusses a topic related to **hardware**.

This article discusses general MICROS knowledge and/or **terminology**.

iOS™ on Simphony™ v2

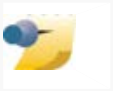
Support for Apple® iPad® devices was first released on MICROS Simphony version 2.5. When run on an iPad, the Simphony Point of Service (POS) client operates almost exactly like it does on a Microsoft Windows® device.

The client is configured using the Enterprise Management Console (EMC) regardless of the platform used. This feature allows a single tool to manage the POS attributes like Employees, Menu Items, Discounts, Taxes and Service Charges for all Simphony devices. System administrators use EMC to configure the pages (touchscreens) for all clients – and have the ability to deploy different user interfaces to iOS devices than traditional fixed place Workstations.

Customers can seamlessly move from one platform to the other because the user interface workflow is the same. iOS devices fully support the kitchen production solutions like remote printing and MICROS Kitchen Display System (KDS). Since the same business logic and configuration are used on all platforms, rules that goven when items can be sold, discounts can be applied, and functions that employees can perform are consistent across of the the device.

However, the iOS devices do have special requirements that users familiar with the traditional Microsoft platforms need to take into consideration to ensure a successful experience. These differences range from the deployment methodology to configuration requirements to the procurement process. Understanding these nuances and using them to set the right expectations with customers will ensure that each deployment with iOS devices will be a success.

The version available at the time of this document writing is Simphony 2.6.



Note: Any content loaded into an iOS device can not have spaces in the filename. ex: "File Name" (incorrect) vs. "FileName" or "File_Name" (correct).

iOS Platform Support

Devices

There are a number of different iOS devices that are currently in the field. The following chart shows which devices have been tested against the application and which are supported.

Device	Tested	Supported
iPad II	Yes	No
iPad III (“The New iPad”)	Yes	Yes
iPad IV (Lightning Connector)	Yes	Yes
iPad Mini	Yes	Yes
iPad Air	Yes	Yes
iPad Mini 2	Yes	Yes
iPhone (all models)	No	No
iPod Touch (all models)	No	No

The iPad II was tested with the Simphony Application. The hardware was not capable of running the software acceptably from a performance perspective.

Operating Systems

The following chart shows the validation status of the different versions of iOS currently available in the field.

iOS Version	Validated
iOS6	Yes
iOS7	Yes

Guided Access

This iOS feature is not required for Simphony to operate, but it can be useful for customers that want to lock the device to just being used for the Simphony. The following link provides more information on how to use this feature:

Click Here (http://support.apple.com/kb/ht5509)

Application Functionality Support

Services

The following chart show which features of the Simphony ServiceHost are supported on iOS:

Service Name	Supported
Backup Check & Posting	No
Check & Posting	No

Interface	No
Kitchen Display System Controller	No
Point of Service Operations Client	Yes
Printing Service	No
SIM Remote File Access	No
Transaction Services	No

Essentially, iOS devices are only capable of operating the Simphony POS Client application and cannot be used to host any shared services that could be accessed by other devices.

Since iOS devices do not support the Check and Posting Service CAPS, it is necessary for at least one Microsoft based device to be present on the property where the iPads are deployed. It is recommended that this device be a MICROS Workstation 5a (POSReady) or MICROS PC Workstation 2015 so that it can be used to process electronic payments as well.

Extensibility and Customization

The Simphony POS Client has a number of extensibility and customization features that are available on the Microsoft Windows® platforms. The following chart contains a list of the commonly used extensibility tools that are used and their computability with iOS.

Extensibility Method	Supported
.NET Extensions (C# & VB.NET)	No
Payment Drivers*	No
Page Templates	No
System Interface Module Scripting	No**
User Interface Resource Dictionaries	No

(*)Refer to the Payment Driver section for additional details

(**)Simphony v2.6 (February 2014) will support the OPERA Interface. This interface is SIM script based, but general SIM script is not scheduled to be released in that version.

Payment Drivers

Processing credit cards and other forms of electronic payments is not supported on the iOS clients. The only supported payment driver available for iOS devices is the cash driver. For this reason, it is necessary for at least one Microsoft based device to be present on the property where the iPads are deployed. It is recommended that this device be a MICROS Workstation 5a (POSReady) or MICROS PC Workstation 2015 so that it can be used to host the Check and Posting Service as well.

Credit Cards

Simphony comes with several credit card payment drivers which are installed with the application. The following chart contains a list of those drivers and their supported status with the iOS platform.

Payment Driver	Supported
CAPMS	No
Fusebox	No
Shift4	No
VISAD*	No

(*) Support for the basic VISAD payment module, which is used by the majority of Simphony v2.5 customers in UCAN with MerchantLink®

(a credit card gateway service provider) will be available with Simphony v2.6 (February 2014).

UCAN Note: The driver recently completed by MerchantLink which supports TransactionVault™ and TransactionShield™ is ***NOT*** compatible with iOS devices.

Gift Cards

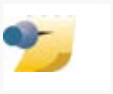
The MICROS Xprocessor developed by MICROS Professional Services, which is typically used for 3rd party gift cards like GIVEX, is not supported on iOS devices. The Loadable SVC and Loyalty modules, which are used with solutions like MICROS iCare and FreedomPay, are not supported.

Device-Specific Configuration Constraints

Each model of iPad has different capabilities with regard to the number of menu items, revenue centers, pages, etc. The following chart contains information regarding the recommended maximum values for the validated devices.

Device	RVCs	Menu Item Definitions
iPad III (“The New iPad”)	4	10,000
iPad IV (Lightning Connector)	8	19,000+
iPad Mini*	6	19,000
iPad Mini 2	8	19,000+
iPad Air	8	19,000+

- Because of the difference in RAM, the iPad Mini is not recommended for large properties



Note: As the devices reach the upper limits of the specifications above, users *may* begin to experience slowness.

The numbers of Revenue Centers figure indicates how many RVCs worth of data can be downloaded to the iPad, which would allow the device to operate within any of those RVCs.

Point of Service Client Functionality

iOS devices support the vast majority of available POS Client functionality. The following list contains features that are not supported on iOS devices.

- All Workstation Reports (e.g., Financial, Labor and Check Reports)
- Button Styles
  - Auto-Active
  - MICROS Wave Button Style
- Check Detail Gesturing Functions
  - Edit Seat
- Reservation & Wait Lists
- Custom Content Loader
- Dining Tables
- Property Management Console Functions:
  - Replay Checks
  - Edit Employee PIN
  - Redirect Order Device
  - Edit Routing Groups

Reload / Refresh CAPS Database
- Device Diagnostics
- Add Employee

If a feature is neither listed above nor mentioned in any previous section as a constraint, then it is considered supported.

Network Configuration Requirements

Wireless Network

Since the iOS devices are connected to Simphony wirelessly using an 802.11x network, it is vital for the site to have a high quality wireless network. Spotty Wifi coverage will lead to application performance issues with check sharing and posting as well bouncing between online and offline states with the services on property (e.g., Check and Posting, Printing and Kitchen Display) and the enterprise – which will impact receiving database updates.

iPads must be configured to use a Wireless Local Area Network (LAN) that has connectivity to the LAN used by the Check and Posting Service and any other Simphony clients that they may share checks with. Use of a 3G or 4G connection through a telecommunications provider back to these locals devices is not supported.

Internet Protocol Address Configuration

iOS devices ***must*** be configured to use a static IP address. The use of Dynamic Host Configuration Protocol (DHCP) assigned addresses is ***not*** supported.

Disable Standby Mode

Due to the Simphony client's ability to share checks between each other, it is necessary for client to be accessible at all times by the other clients and the Check and Posting service. This requirement is so that other workstations can pick up checks that are owned by the iOS device. It is also needed so that the device can receive updated check information from the other workstations.

It should be noted that disabling standby mode will cause the device to drain its battery more quickly than usual since the device won't be able to use this power saving technique.

Procuring the iOS Client

The process for licensing, obtaining, and distributing the iOS client software is different than the Microsoft client. There is a special process that must be followed to obtain the rights and necessary credentials from Apple® to install the application.

The Simphony POS Client application is distributed through a tool called Apperian Enterprise App Services Environment (EASE®). This tool allows MICROS the ability to release software to customers outside of the typical deployment mechanism Apple offers, the iTunes store.

There are additional steps that must be taken to obtain and deploy the iOS client which do not apply to Microsoft based platforms. The following list contains all of the steps that are necessary to order and deploy the Simphony Point of Service client on an iOS device for the first time.

1) Customer must place an order with MICROS that contains the following:

a. Simphony POS Client License (one per POS client)
b. MICROS Apperian Application Catalog Access (once per Enterprise)
c. MICROS Apperian Application Client License (one per iOS device)

2) Customer joins the Apple iOS Developer Enterprise Program

3) Customer creates the necessary credentials to sign the Simphony POS Client application

4) MICROS provisions Apperian EASE organization

5) MICROS uploads the Simphony POS Client application into EASE

6) MICROS signs the Simphony POS Client application with the customer's credentials

7) Download and configure the Simphony POS Client application

Additional details for each step are contained in the following sections.

Customer Places Order

The Simphony POS Client license is purchased in the same fashion regardless of the operating system that the client will be deployed to.

Additional components must be purchased to cover the costs related to the use of the Apperian EASE mobile application management tool. The MICROS Apperian Application Catalog Access is purchased once for each enterprise. The MICROS Apperian Application Client License is an annual fee that is billed in year one and each year thereafter for each iOS client.

Customers that use their own Mobile Device Management software will not have to purchase the Apperian EASE service.

After placing the order, the process for updating the license codes with the Simphony application and configuring the workstation records must be followed, just as if Microsoft based devices had been added to the system.

Customer Joins Apple iOS Enterprise Developer Program

Apple licensing requirements mandate that that the customer join the Apple iOS Developer Enterprise Program to deploy the Simphony client. Apple charges a fee of $299 / year to participate in this program. This fee must be paid to Apple independently of any fees paid to MICROS. Additionally, the customer must have a valid Dun & Bradstreet (D-U-N-S) number to apply for the program.

The following link can be used to access the program registration page. (https://developer.apple.com/programs/ios/enterprise/)

Customer Creates Application Signing Credentials

Upon joining the iOS Developer Enterprise Program, the customer will need to generate the required credentials for signing the Simphony POS Client application. The signing process applies the customer-specific credentials to the Simphony POS Client Application so that it can be loaded onto the device. The credentials are checked by the iOS device to ensure that the application is valid.

There are two required items to sign the application. The links shown below provide instructions on how to create the required credentials:

- Provisioning Profile File
  - https://help.apperian.com/display/pub/Distribution+Provisioning+Profiles
- Key/Certificate P12 File
  - For Mac Users:
    - https://help.apperian.com/display/pub/Distribution+Certificates
  - For Windows Users:
    - http://www.youtube.com/watch?v=4GteMgFvA1Y

Another useful link which contain information about the process for creating these files is here:

- http://mobiforge.com/design-development/deploying-iphone-apps-real-devices

There are several different kinds of provisioning profiles that can be created. An Ad Hoc Distribution profile must be used for the Simphony POS Client application. Developer profiles will not work with the application.

MICROS Provisions Customer Organization

Once the steps above have been finished, the customer's organization can be created within the Apperian EASE tool. A request to provision the customer organization must be sent to the regional Simphony Product Management team. The request should include the following information:

- Customer Name and Number
- Sales Order Number
- Customer Administrator Name
- Customer Administrator Email Address
- A Copy of the Provisioning Profile File
- A Copy of the Key/Certificate P12 File
- Password for the P12 File

The standard turnaround time to process a request is 5 business days from the time all of the required components have been received. The customer administrator will receive an invitation email from EASE and have full administrative control over their organization. They will be able to create and manage additional users and groups as well as load their own signing credentials.

The customer's organization will be a part of the overall MICROS organization within EASE, which will allow MICROS administrator's access to their organization to post new versions of the software and also to provide support with signing and downloading the application.

As part of the provisioning process, the signing credentials are loaded into EASE.

MICROS Uploads and Signs the Simphony POS Client Application

Once the credentials have been loaded into EASE, a MICROS administrator will upload the necessary versions of the Simphony POS Client into the customer organization. After the client has been uploaded, the application will be signed using the credentials that were stored within EASE.

Download and Configure the Simphony POS Client Application

The Simphony POS client can now be downloaded to the customer's devices. Simply point the device's web browser to the Apperian App Catalog, sign in, and download the application. After the application has been installed, the client can be started. Enter in the information necessary to connect to the Simphony Enterprise application server.

From this point onward, the iOS client will act in a fashion that is similar to the Microsoft clients. The client will connect to the enterprise and pull down the local database. The user will be prompted to enter the Installer username and password. Once successfully entered, the user will be able to start using the client for POS operations.

Upgrading the iOS Client

The iOS client software cannot be managed using the standard MICROS software deployment management tool – the Client Application Loader (CAL). When a customer upgrades to a new version of Simphony, it is necessary to manually update each of the iOS client with the new software.

Prior to the date / time of the scheduled upgrade, the new version of the Simphony iOS client must be added to the customer's Apperian organization and signed with their credentials so that it is available for installation on the date of the upgrade.

To obtain the new version of software, the regional Simphony Product Management team must be contacted so that the new version of the client software can be added to the customer's Apperian organization and signed with their credentials. After the application has been signed, the devices at the customer's site can then be upgraded to the new version.

Due to potential changes in check sharing messages and data types, it is necessary to upgrade the iOS devices before they are used at a property that has been upgraded. Trying to use an older version of the iOS client software with the upgrade software on the property could cause data loss and result in checks that cannot be posted.

Annual Application Resigning

The distribution profile, which is first obtained during the initial purchase process, is valid for one year. After the year has elapsed, the profile is no longer valid, and any application that is signed with it will no longer function.

Annually, customers must renew the iOS Developer Enterprise Program and create a new provisioning profile which will have a new

expiration date. The new profile must be used to resign any versions of the Simphony iOS client that are in the customer's app store. The resigned application must then be deployed to all of the devices that are running the iOS client.

EASE automatically provides notifications to administrator of the customer organization advising them of any upcoming profile expiration dates. The first notification goes out 60 days prior to the expiration of the profile, and additional reminders are sent at 45 and 30 days prior to the expiration date.

The following link provides additional information on this requirement (https://help.apperian.com/display/pub/Signing+FAQ#SigningFAQ-appexpires) :

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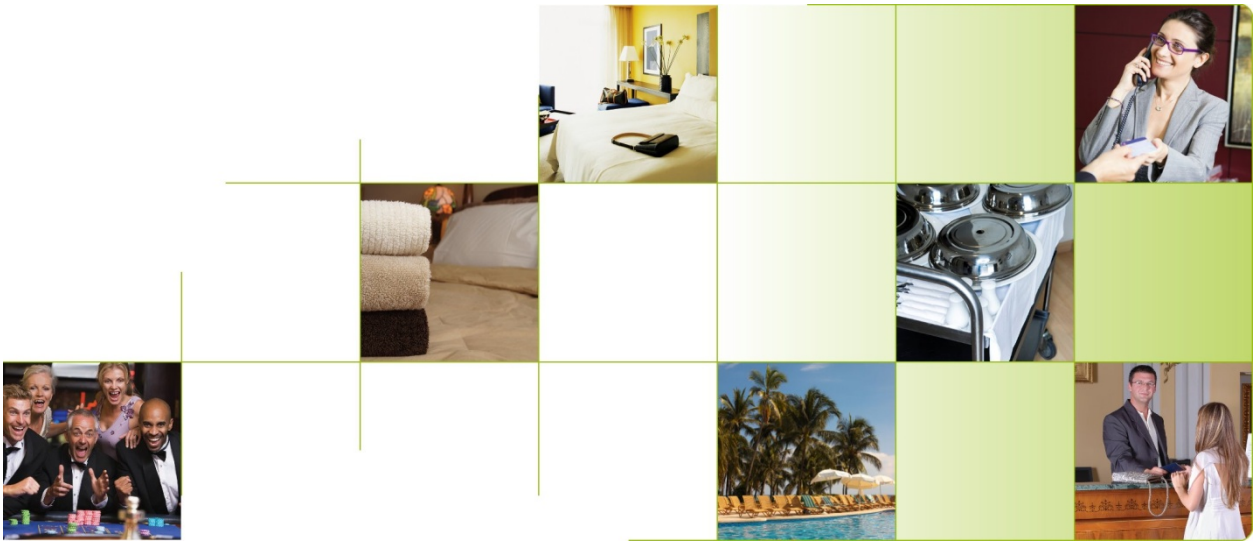

Simphony Loyalty User Guide

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Document Author: Simphony Technology Department

MICROS Systems, Inc.
7031 Columbia Gateway Drive
Columbia, MD 21046
(443) 285-8000 / Fax: (443)-285-6505

About This Document

This guide provides a comprehensive understanding of the features and functions that have been introduced with the new Loyalty module in Simphony v2.5 MR1.

This document contains features available for the Version v2.5 MR1 and higher release of the MICROS Simphony software.

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- MICROS Installers/Programmers
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

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- Operational understanding of PCs
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Prerequisite Configuration

To support the use of point-based Loyalty programs, the Simphony Loyalty module will be required. Please refer to the *Simphony Loyalty Module and Driver Configuration Guide* for instructions about how to configure the Loyalty module and driver.

Loyalty Functions

Base Loyalty Transactions

The following Loyalty functions can be used with either MICROS iCare or a third party Loyalty application.

Balance Inquiry

Request a points balance for a Loyalty Account. The request can be performed either outside of a Guest Check or within an open Guest Check by Account Number, Guest Name, or Phone Number.

Issue Points

Issue points to a Loyalty Account. The points issuance can be performed by Account Number, Guest Name, or Phone Number.

Coupon Inquiry

Request a list of coupons that are available for a Loyalty Account. The request can be performed by Account Number, Guest Name, or Phone Number, and can be performed either outside of a Guest Check or within an open Guest Check.

From an open Guest Check, if coupons are available, then after selecting the 'Coupon Inquiry' function, a list of coupons will display and you must select one to redeem. The list of available coupons does not display the same as outside of a Guest Check; in an Open Guest Check, you cannot print the list of coupons.

Issue Coupon

Issue an ad hoc coupon to a guest Loyalty Account.

Redeem Coupon

Accept/redeem a coupon to apply towards the balance of a Guest Check.

Transfer Loyalty Account

Performs a transfer of one Loyalty Account number to another Loyalty Account. In iCare, both points and personal information are transferred.

iCare Loyalty Transactions

The following Loyalty functions can be used only with MICROS iCare; these features cannot be used with a third party Loyalty application.

Unique Items Inquiry

Request a list of unique menu items that have been ordered on a program associated with a Loyalty Account. Programs can be based on the purchase of Menu Items, Sales Itemizers, and Family/Major Groups (requires mymicros.net).

Apply Card to Check Function

Based upon iCare configuration, a number of actions may be allowed and returned to the user for selection:

- Apply Coupon —
- Redeem Points — Redeem partial or full points associated with a Loyalty Account.
- Redeem SVC — Pay for a Guest Check balance using a Stored Value Card (SVC).
- Apply Coupon/Redeem SVC —
- Issue Points — Issue points to a Loyalty Account.

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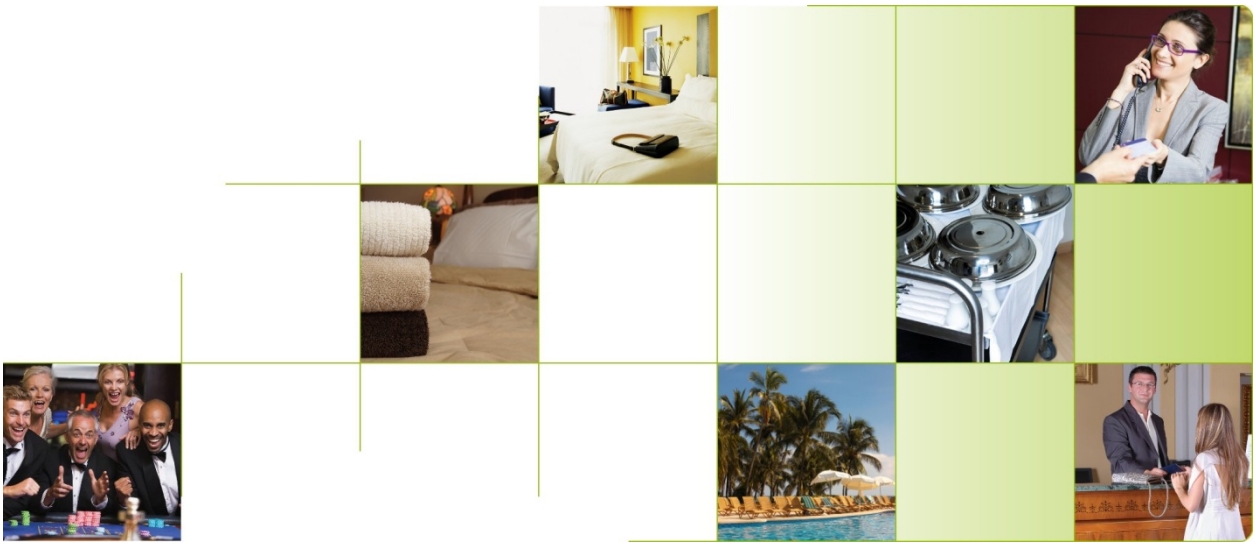

Simphony Reservations User Guide

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Document Author: Simphony Product Management Documentation

MICROS Systems, Inc.
7031 Columbia Gateway Drive
Columbia, MD 21046
(443) 285-8000 / Fax: (443)-285-6505

About This Document

This guide provides a comprehensive understanding of the features and functions that have been introduced with the new Reservations module in Simphony v2.6.

This document contains features available for the Version 2.6 release of the MICROS Simphony software.

Who Should Be Reading This Document

This document is intended for the following audiences:

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Document Organization

For clarity, information is divided into self-contained chapters, reflecting the usage of the following Reservations functions:

- Prerequisite Configuration
- Reservations Feature Usage
- Reservation List Icons

For more information about these features and step-by-step instructions to configure them, refer to the *Simphony Reservations Configuration Guide*, available from the MICROS website.

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Prerequisite Configuration

Simphony Reservations

To support the acceptance and seating of reservations, the Simphony Reservation List will be required. Please refer to the *Simphony Reservations Configuration Guide* for instructions about how to configure the Reservation List.

Simphony Table Management

To support the taking of reservations, the Simphony Table Management System (TMS) will be required. Please refer to the *Simphony Table Management System Configuration Guide* for instructions about how to configure TMS.

Simphony Wait List

To support the acceptance and seating of reservations, the Simphony Wait List will be required. Please refer to the *Simphony Wait List Configuration Guide* for instructions about how to configure the Wait List.

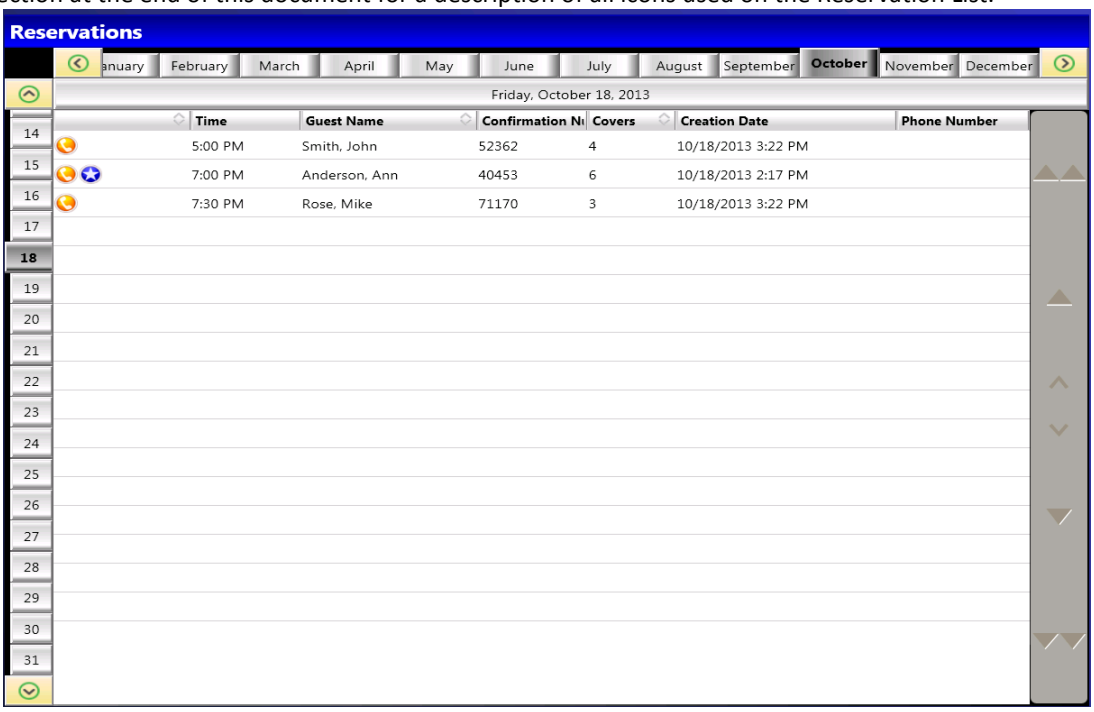
Reservations Feature Usage

Reservation List

The Reservation List contains all reservation requests for the Revenue Center. Users with access to the Reservation List can create, edit, and cancel reservation requests from this list.

This form can be managed on its own page or optionally as a popup form in the host view. (From the long-press options in the Host Area, select the **Display | Show Reservation List** option.) For simplicity of use, it is recommended that a Reservation List be present on its own page as there are no seating capabilities from the Reservation List.

The example shown below contains three reservations for October 18, 2013. Please refer to the Reservation List Icons section at the end of this document for a description of all icons used on the Reservation List.



The Reservation List — depending on how it was configured — can display certain information in columns. The width and order of each column is configured in EMC.

- Cancel Date
  If the reservation has been cancelled or was a no-show, this will contain the date and time the record was updated to the new status.

- Alert Icon
  The Alert Icon is always enabled and is the first column shown in the Reservation List. This column contains any icons that are utilized to indicate status or properties of the reservation record. This includes an icon representing the Request Method, VIP, and Seating Preferences. Please refer to the Reservation List Icons section at the end of this document for a list of all possible icons.

- Confirmation Number
  Once the reservation record has been created and is shown on the Reservation List, a system issued confirmation number can be shown.

- Covers
  This column displays the number of covers that are currently defined for the reservation request.

- Creation Date
  This column displays the date and time that the reservation request was created.

- Greeted Date
  Once the reservation record has been greeted by a member of the host staff, a Greeted time can be shown.

- Time
  The Time column is always enabled and is the second column shown in the Reservation List. This column contains the time that the reservation record is scheduled to be seated.

- Guest Name
  This column displays the Guest Name that was entered for the reservation request.

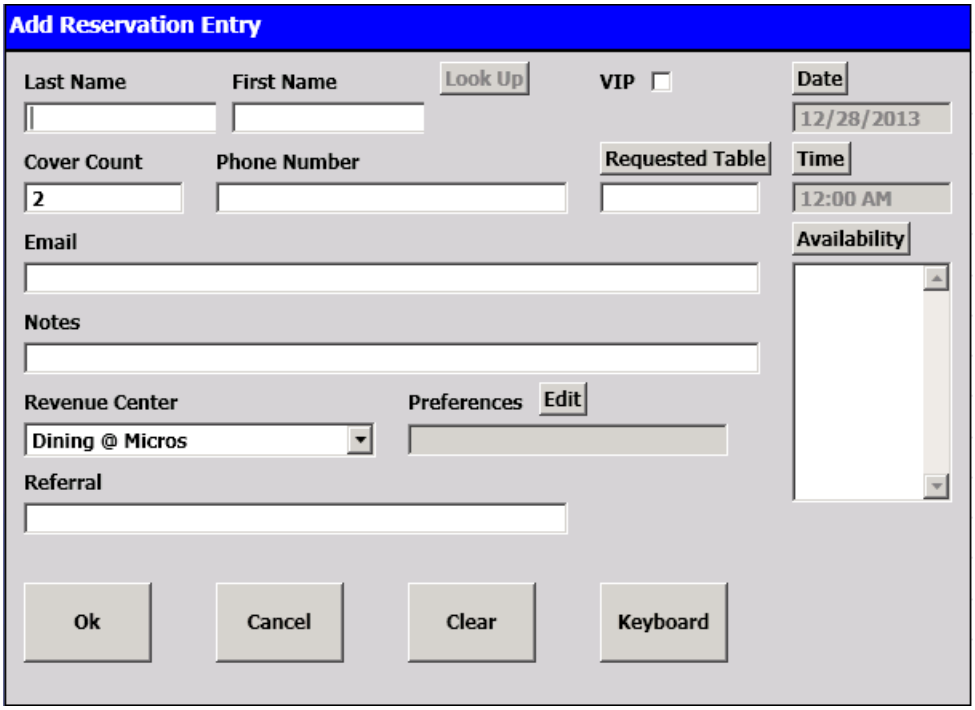
- Phone Number
  This column displays the phone number that was entered for the reservation request.

Add New Reservation

1. Double-touch quickly on the Reservation List or click the **New Reservation** button (if this feature has been enabled) to create a new reservation request.

> *As more reservations are created for a specific date, the space available on the Reservation List decreases. There is a designated space at the bottom of the list that will always remain empty.*

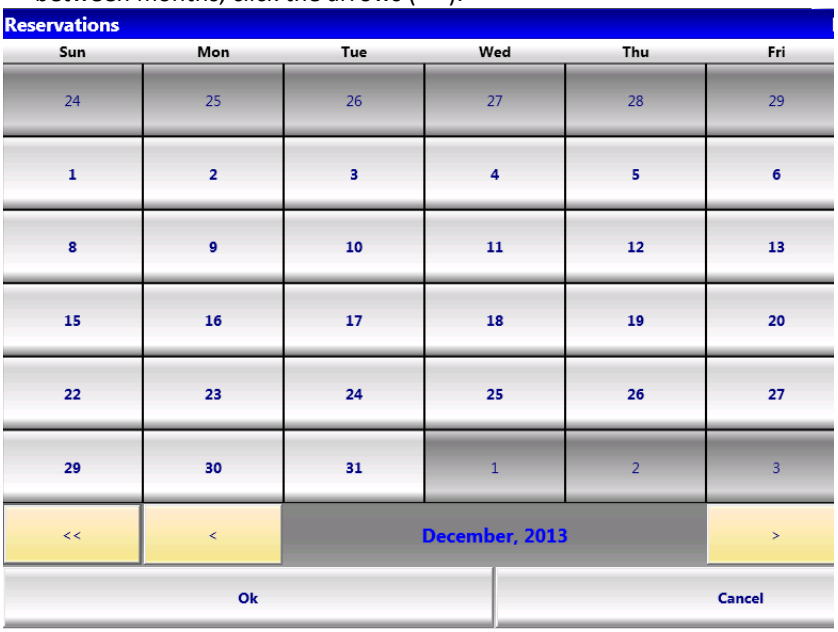
2. The Add Reservation Entry form appears.



3. The Date of the reservation request defaults based upon the currently selected date prior to opening the Add Reservation Entry form.

    a. If you need to change the date, click the **Date** button on the form.

b. On the Reservations calendar, select a different date. To move forward or backward between months, click the arrows (< >).



c. Click the **OK** button to close the calendar and return to the Add Reservation Entry form.

4. Enter information about the guest using any of the fields and buttons listed below.

> *You can enter data using either a keyboard and/or mouse that are physically attached to the workstation in which the request is being entered. Alternately, a **Keyboard** button has been provided on the Add Reservation Entry form. Selecting this button will present an on-screen entry window that is based upon the accepted values for the field that you are currently entering.*

- Name (required)
  The First Name, Last Name, or both can be entered into these fields. The value(s) entered will be used on the request and will be included on any Guest Check that is opened from this request.

- Look Up
  If a Loyalty application such as Simphony Loyalty is used, you can look up and associate a guest's loyalty account with their reservation.

- VIP
  This option allows you to mark the guest as a VIP for the reservation.

- Cover Count (required)
  The number of persons in the party that will require seating when the reservation is to be seated.

- Phone Number
  The guest phone number that can be used to contact the guest should there be any questions or problems with the reservation.

- Requested Table
  In those cases where the guest has a specific table request, the Table Request feature allows for the flagging of a table number as User Suggested. This does not guarantee the table number; rather, it increases the likelihood that the table will be available when this guest arrives for their reservation.

- Time (required)
  The Time button allows you to advance the time for the reservation using the Hour and Minute **+** / **-** buttons.

- Availability
  By selecting the Availability button, a list will display with any available reservation time slots as defined by the manager. To select from the available list, just touch the time you wish to reserve.

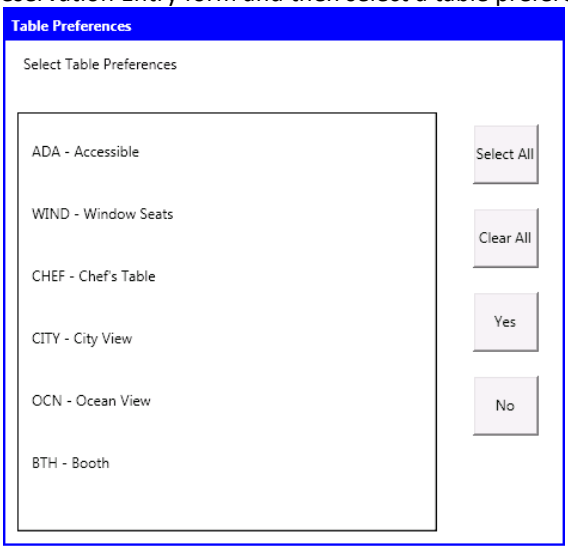
- Email
  If the guest provides an e-mail address, they may receive future promotions from your property.

- Notes
  This is an open field to enter any special notes that should be provided to the staff working the day this reservation is scheduled to arrive. Typical examples of notes include Birthday, Anniversary, allergic to shellfish, etc.

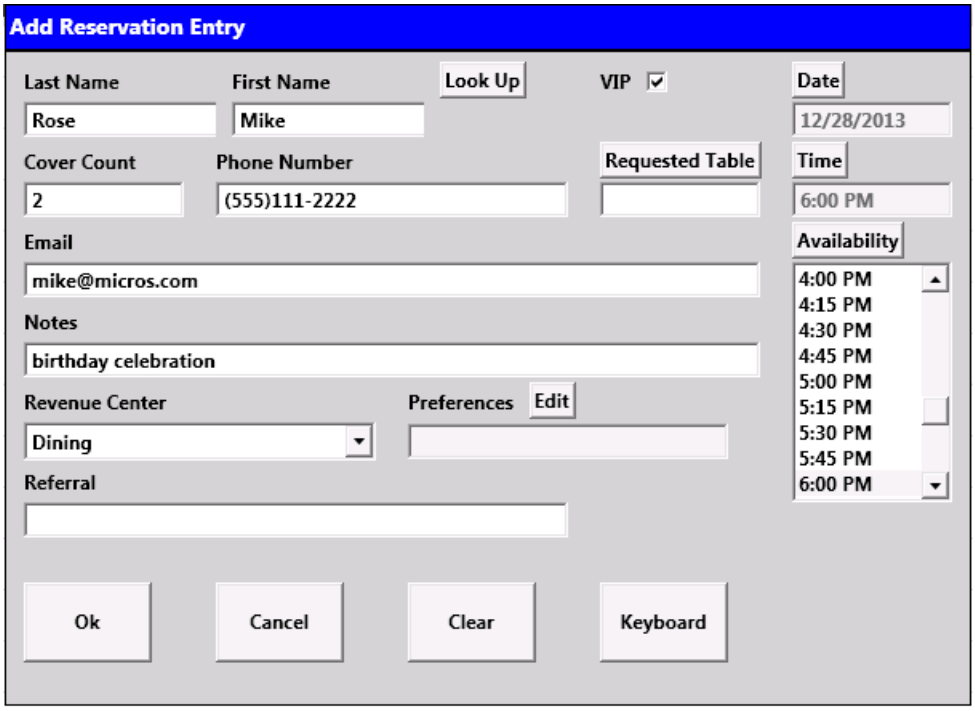
- Revenue Center (required)
  If the property is configured to support reservations across multiple revenue centers, a list of those revenue centers will be provided. This allows a user in the Dining Room to make a future reservation for a guest in another revenue center at the property.

*If you change the revenue center after having selected availability, you must re-select the **Availability** button to determine what times are available in the new revenue center.*

- Preferences
  If the guest has a table preference they would like to include such as Smoking, Patio, Booth, Window Seat, etc. these can optionally be included in the reservation request. Click the **Edit** button on the Add Reservation Entry form and then select a table preference.

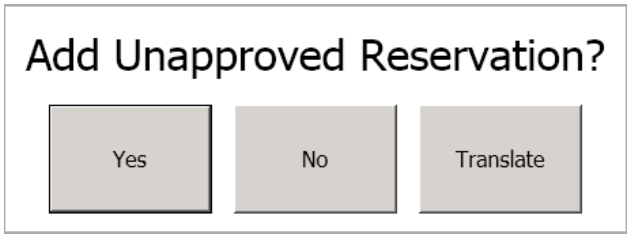


- Referral
  The referral field allows for documentation of any referral sources such as Taxi Services, Hotel Concierge, or Advertisements.



5. Once the information for the guest's reservation request has been completed on the Add Reservation Entry form, touch the **OK** button to save.

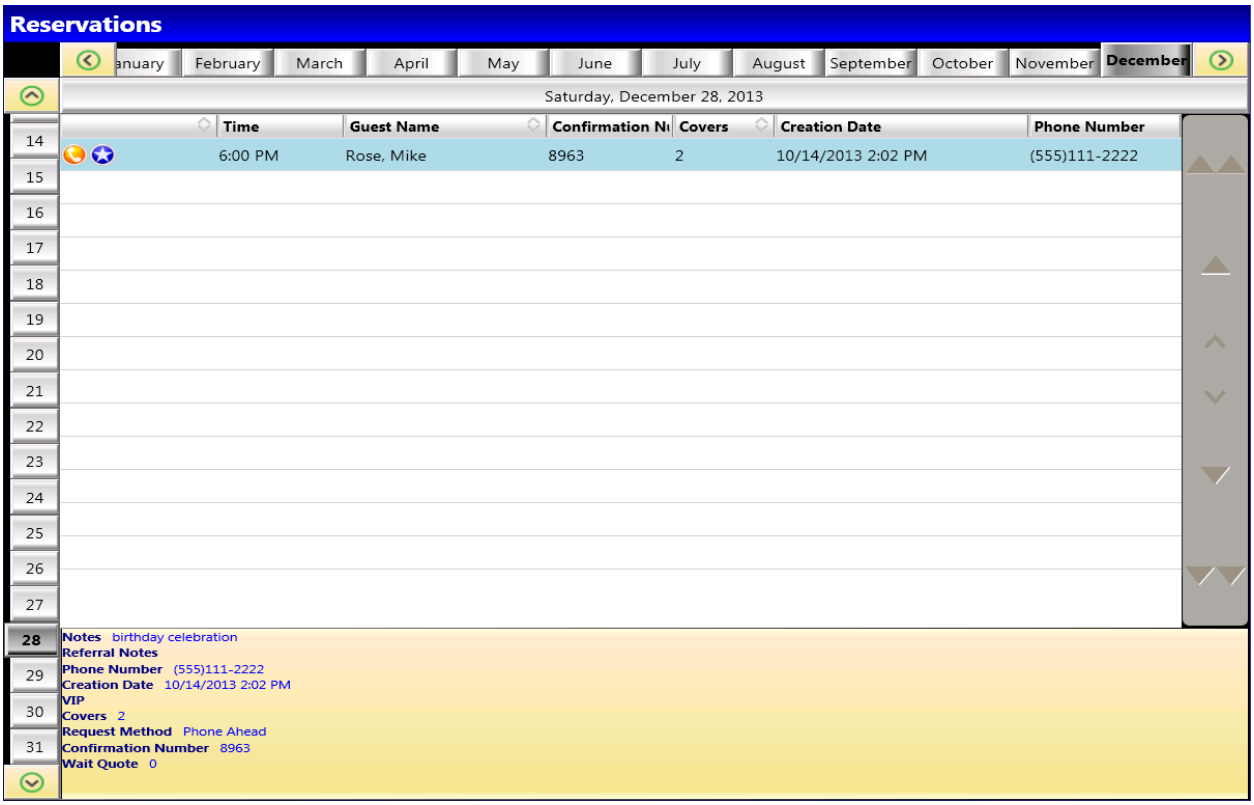
*In some cases where the request values entered do not match the system's allowable timeframes, you may be prompted to approve the reservation. From this prompt you can select **No** to save the request as unapproved, or **Yes** to approve the reservation if you have the **Enable Reservation Approval** permission.*



Unapproved reservations will not be treated any differently until they reach the list of records to arrive. At that point they will be shown in the list as Unapproved Reservations. This permits the user to approve the reservations, cancel a reservation, or manually control the quickness of seating this request versus other approved requests.

6. The Add Reservation Entry form closes and a new reservation record for the guest displays on the Reservation List.

> *Once the reservation has been added and is shown on the Reservation List, a system issued confirmation number displays in the summary area at the bottom of the Reservation List. Highlight the reservation request in the list to view details in the summary area.*



Show / Hide / Modify Summary Area Information

When a reservation request is highlighted on the Reservation List, a summary area can display (if configured) at the bottom of the Reservation List. The Summary area can contain the following information for a reservation request.

- Cancel Date
  If the reservation request was cancelled, this summary option will show the date and time the request was cancelled or set to a no-show.

- Confirmation Number
  This summary option shows the confirmation number associated with the reservation request.

- Covers
  This summary option shows the number of covers associated with the reservation request.

- Creation Date
  This summary option shows the date and time the request was created.

- Greeted Date
  This summary option shows the time the request was greeted by a hosting staff member.

- Notes
  This summary option shows any text that has been included in the notes field of the reservation request.

- Phone Number
  This summary option shows the phone number associated with the reservation request.

- Referral Notes
  This summary option shows any text that has been included in the referral notes field of the reservation request.

- Request Method
  This summary option shows a text description (Phone Ahead, Internet) of the request method for the reservation request.

- VIP
  This summary option displays "VIP" in the summary area if the reservation request has been flagged as being a VIP.

Hide Summary Area

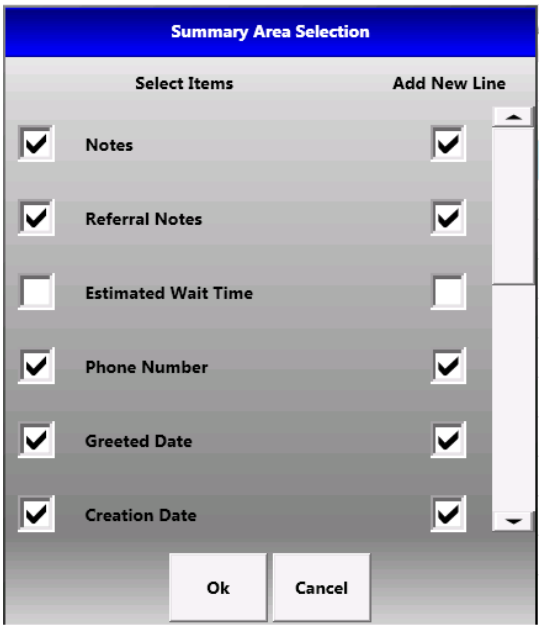
To prevent the summary area from displaying, long-press on a reservation request and select the **Hide Summary Area** option.

Show Summary Area

To display the summary area, long-press on a reservation request and select the **Show Summary** option.

Modify Summary Area

1. To change the summary area display, long-press on a reservation request and select the **Modify Summary Area** option.
2. On the Summary Area Selection dialog, check/uncheck the desired fields on the left side.
3. To force the field to display on a separate line, check the corresponding Add New Line check box on the right side.



4. Click the **OK** button.

> *The example screenshot on page 11 shows the Summary Area with the selected information fields displayed on separate lines. If the information fields are not displayed on separate lines, the text wraps.*

Edit Reservation

1. To edit a reservation, double-touch quickly on the line with the reservation request or highlight the record and click the **Edit Reservations** button. This will open the request and allow you to make any changes.
2. Change any of the values described above in the section titled "Add New Reservation".
3. Once the updated information for the guest's reservation request has been completed, touch the **OK** button to save.
4. The Edit Reservation Entry form closes and the updated reservation record for the guest displays on the Reservation List.

> *If a Reservation List request is opened and updated on multiple workstations, the last record to be updated "wins" and reflects the changes.*

Sort Reservation List

Click any of the column headings with up or down arrows (^v) to sort the Reservation List.

- Icons (VIP)
  When sorted in ascending order, the VIP records sort in order by Creation Date.

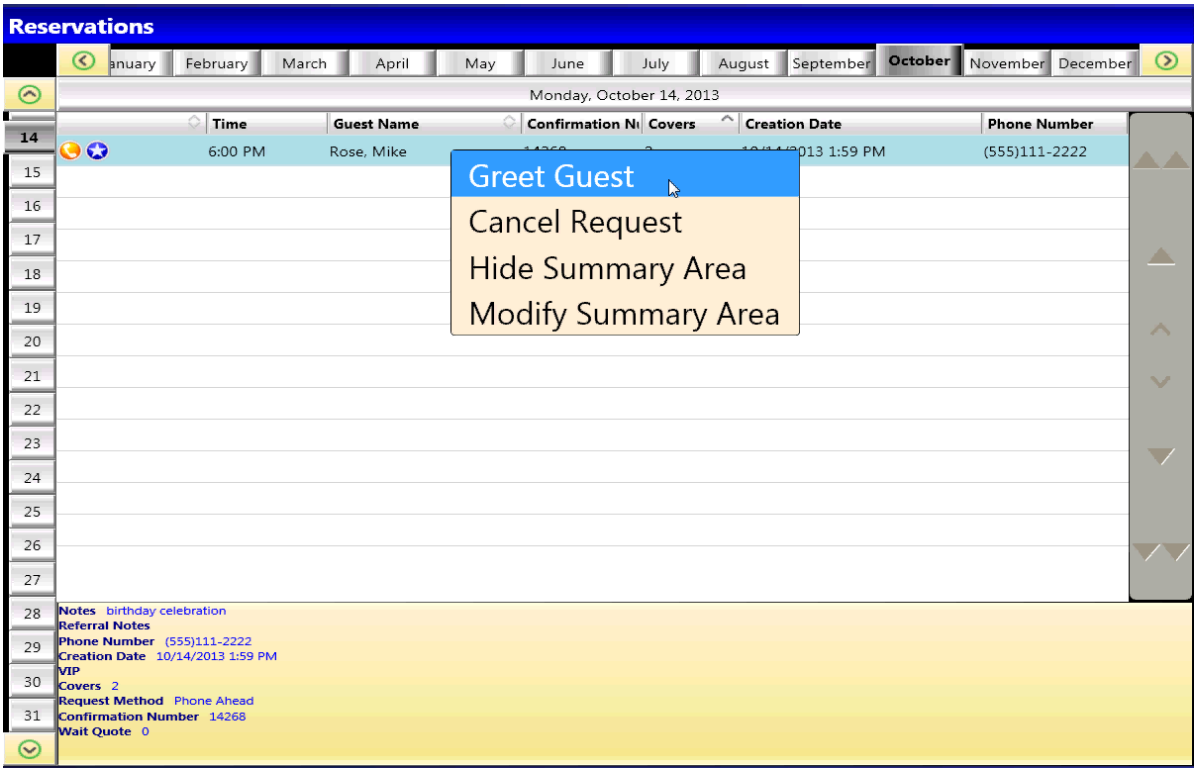
- Guest Name
  Toggles alphabetically by last name each time the column header is selected.

- Covers
  Toggles between ascending and descending each time the column header is selected.

Greet Guest / Cancel Reservation

Greet Guest

1. If the guest arrives earlier than anticipated, the **Greet Guest** option is available from the long-press list (you must have the **Greet Wait List Entry** permission).

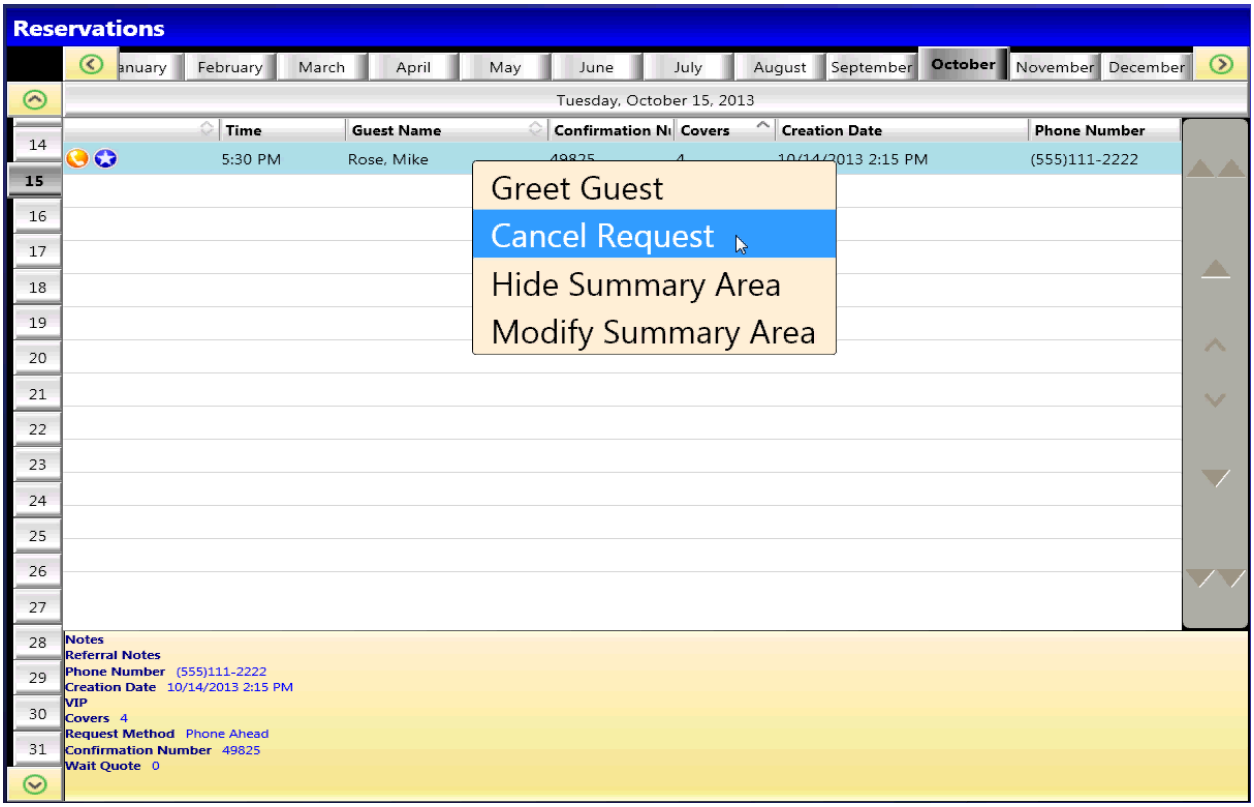


2. Select **Greet Guest** to mark the guest's reservation as greeted.
3. The reservation will move from the Reservation List to the current Wait List.

> *This feature allows for guests with reservations on future days to be greeted. If Greet Guest is performed, the future reservation will show on the Wait List but their reservation record does NOT move to today's business date.*

Cancel Reservation

1. If the guest contacts you and wants to cancel their reservation request, long-press on the request for a couple of seconds until a list of options appears.
2. From this list, select the **Cancel Request** option (you must have the **Cancel Reservation Entry** permission).



3. Depending on the configuration of your system, you may be prompted to enter a reason code from a pre-populated list as to why the reservation is being cancelled.

Reservation List Icons

The following icons are used on the Reservation List display. These icons are predefined in the system.

Icon	Icon Name	Description
	Call Guest	Guest has been paged by the Host.
	Phone Reservation	A reservation that was created from a Phone-In request that has been greeted.
	Phone Reservation (Ungreeted)	A reservation that was created from a Phone-In request that has not been greeted.
	Internet Reservation	A reservation that was created from the Internet that has been greeted.
	Internet Reservation (Ungreeted)	A reservation that was created from the Internet that has not been greeted.
	VIP	Reservation is flagged as containing a VIP guest.
	Cancelled	The reservation has been cancelled.
	Un-Approved Reservation	The reservation was made without approval.
	Abandoned	The reservation was abandoned (guest had a reservation, arrived, but did not get seated — walk away).
	No Show	Guests for reservation never arrived (never greeted).
	Table Preference	The wait or reservation record contains a request for a specific type of table.

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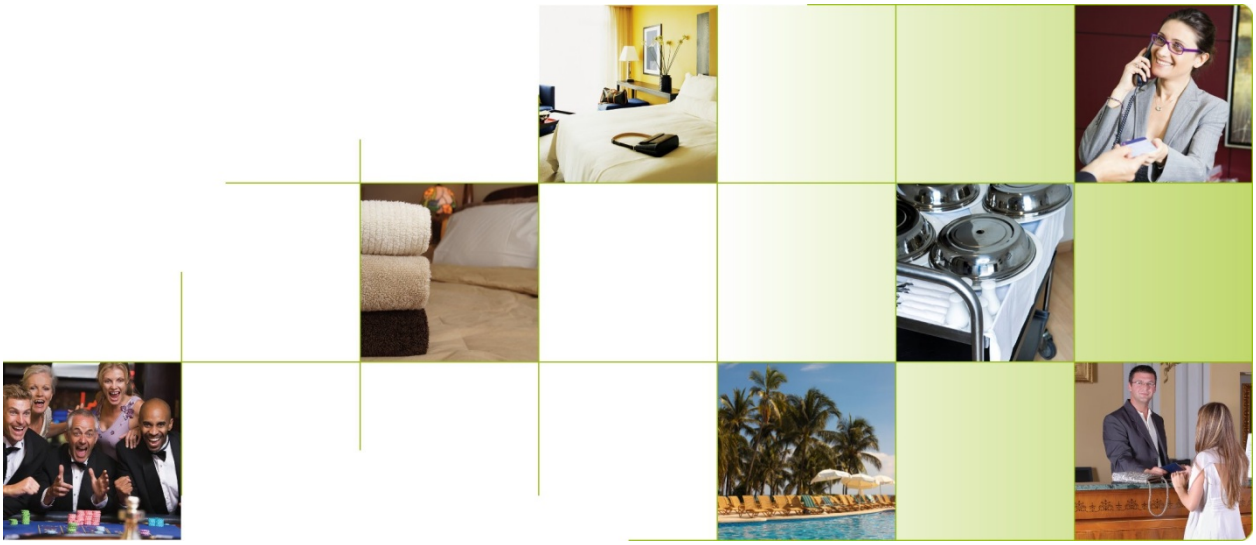

Simphony Stored Value User Guide

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Document Author: Simphony Technology Department

MICROS Systems, Inc.
7031 Columbia Gateway Drive
Columbia, MD 21046
(443) 285-8000 / Fax: (443)-285-6505

About This Document

This guide provides a comprehensive understanding of the features and functions that have been introduced with the new Stored Value module in Simphony v2.5 MR1.

This document contains features available for the Version 2.5 MR1 and higher release of the MICROS Simphony software.

Who Should Be Reading This Document

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Base Stored Value Transactions 5
iCare Stored Value Transactions 5

Prerequisite Configuration

To support the use of Stored Value cards, the Simphony Stored Value module will be required. Please refer to the *Simphony Stored Value Module and Driver Configuration Guide* for instructions about how to configure the Stored Value module and driver.

Stored Value Functions

Base Stored Value Transactions

The following Stored Value functions can be used with either MICROS iCare or a third party Stored Value application.

Balance Inquiry

Request the dollar value currently available on a Stored Value Card (SVC). The request can be performed by Account Number, Guest Name, or Phone Number.

Issue SVC

Issue a single SVC account number for a dollar value that is determined at the time of purchase.

Activate SVC

Activate a single SVC (the user will be prompted to enter the pre-defined dollar value to validate).

Reload

Add funds to a single existing SVC account.

Transfer

Transfer the funds and customer personal information (if applicable) associated with one SVC to another SVC.

Authorize

Authorize a single SVC account number for use as payment on a Guest Check.

Redeem

Pay for a Guest Check balance using an SVC.

Cash Out

Obtain cash back for any remaining balance on an SVC account.

iCare Stored Value Transactions

The following Stored Value functions can be used only with MICROS iCare; these features cannot be used with a third party Stored Value application.

Issue Multiple SVCs

Issue more than one SVC for a dollar value that is determined at the time of purchase.

Activate Multiple SVCs

Activate more than one SVC (the user will be prompted to enter the pre-defined dollar value to validate).

Redeem SVC / Issue Points

This function combines the Redeem SVC and Loyalty Issue Points functions into a single function. When used, the user is prompted to perform a redeem SVC transaction, and then issue points is automatically done by the POS.

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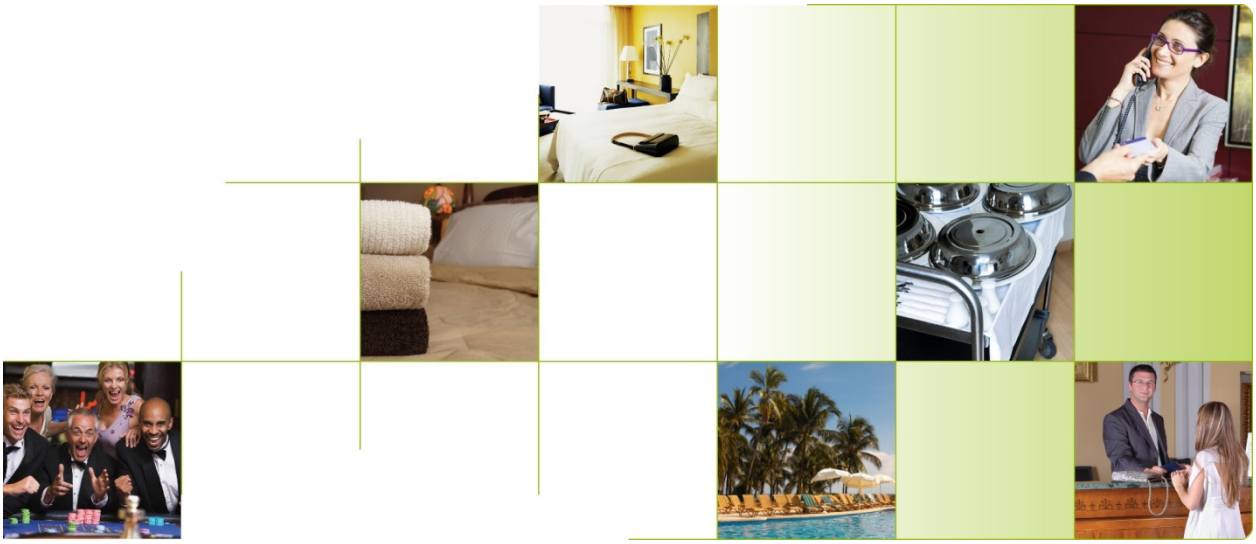

Simphony Table Management User Guide

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Document Author: Simphony Product Management Documentation

MICROS Systems, Inc.
7031 Columbia Gateway Drive
Columbia, MD 21046
(443) 285-8000 / Fax: (443)-285-6505

About This Document

This guide provides a comprehensive understanding of the features and functions that have been introduced with the new Table Management System (TMS) module in Simphony v2.6.

This document contains features available for the Version 2.6 release of the MICROS Simphony software.

Who Should Be Reading This Document

This document is intended for the following audiences:

- MICROS Installers/Programmers
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes the reader has the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of basic network concepts

Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version
Rev A	January	2014	2.6.0

Document Organization

For clarity, information is divided into self-contained chapters, reflecting the usage of the following TMS functions:

- Prerequisite Configuration
- Section Layouts
- Host Command Features
- Table Features
- Other Features

For more information about these features and step-by-step instructions to configure them, refer to the *Simphony Table Management Configuration Guide*, available from the MICROS website.

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Prerequisite Configuration

Simphony Table Management

To support the taking of reservations, the Simphony Table Management System will be required. Please refer to the *Simphony Table Management System Configuration Guide* for instructions about how to configure TMS.

Simphony Reservations

To support the acceptance and seating of reservations, the Simphony Reservation List will be required. Please refer to the *Simphony Reservations Configuration Guide* for instructions about how to configure the Reservation List.

Simphony Wait List

To support the acceptance and seating of reservations, the Simphony Wait List will be required. Please refer to the *Simphony Wait List Configuration Guide* for instructions about how to configure the Wait List.

Section Layouts

A Seating Section Layout allows hosting staff to quickly select tables that will be used in the Revenue Center and assign those tables to a section and/or employees.

Create Layout

Creating a Section Layout

Follow the instructions below to create a new section layout in Ops.

1. Open a Section Layout page.
2. Click the **Create Layout** button.
3. From the Create Layouts popup, select the **New Layout** option and then select the **Create Layout** button.

> *If any pre-defined table/section layouts were configured at the enterprise level, these templates will be displayed in this popup. You may select an existing template for use in creating your new layout.*

4. When prompted, enter a Name that reflects the purpose of the layout that is being created so it can easily be recalled and activated, and then click the **OK** button.

> *For example, you are creating a layout that will accommodate a service staff of 5 during a Breakfast Serving Period. Name the layout "Breakfast 5".*

5. The layout is now created and can be configured to contain static tables and employee assignments.

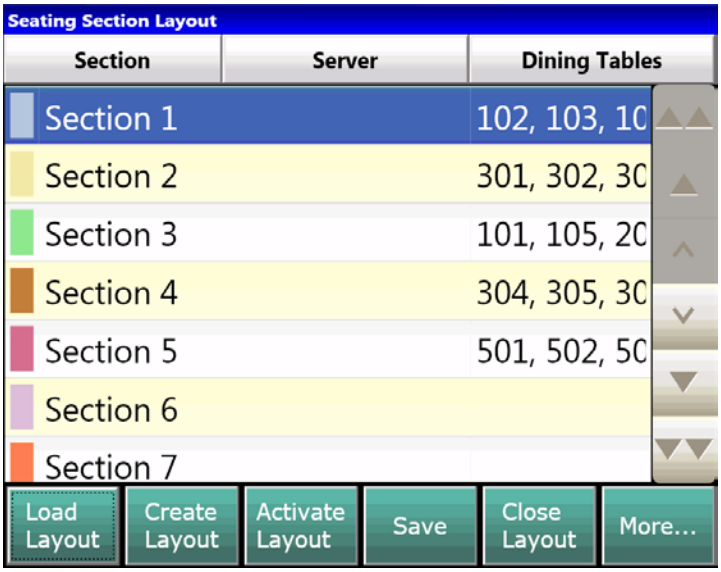
Edit Layout

Editing a Section Layout

Follow the instructions below to edit a section layout.

1. Click the **Load Layout** button.
2. From the Load Layout popup, select the layout that you wish to edit and then select the **Load** button.

> *If you selected a Section that was created from a template, you may already have table numbers assigned to sections within your list. These can be altered to meet your needs for this layout. Otherwise there may be no current assignments for the section.*



3. To assign a table to a section, highlight the section and then:
   a. Touch the table on the screen to populate the table number into the section.

> *Touching a table that is already selected as part of the section will remove the table from the section.*

   b. Long-press on the section and select the **Assign Table** option. From the drop-down list, select the appropriate Table ID – Table Name to assign. This will display a list of tables not currently associated with a section.

> *You may also use the **Unassign Table** option to remove a Table ID – Table Name from the section.*

4. To assign an employee to a section, long-press on the section and select the **Assign Employee** option. From the list, select the appropriate employee to assign.

> *If the section already has an employee assigned, a **None** option will display to allow you to unassign the employee from the section.*

5. Click the **Save** button to record any of your changes to the Section Layout.

Save As

The Save As feature allows you to take the existing layout that is loaded and save a copy of it as a different layout name. This is a useful feature if you wish to make minor changes from one layout to another. It will save you the time of having to re-create a new layout from the beginning.

1. Click the **More…** button.
2. Select the **Save As** option.
3. Enter a Name that reflects the purpose of the layout that is being saved, and then click the **OK** button.

Activate / Deactivate Layout

Activating a Section Layout

Follow these steps to activate a layout for current use.

1. Select the **Activate Layout** button.
2. From the Load Layout popup, select the layout you wish to apply, and then click the **Activate** button.
3. The selected layout will display as the active table layout for use in TMS.

> *Changing the Active layout from one layout to another does NOT change the ownership of any Guest Checks that have already been opened. Activation of a new layout will determine the server that will own any new Guest Checks opened on those available tables.*

Deactivating a Section Layout

The Deactivate Layout feature provides a quick way to clear all Section and Employee Assignments for the tables. It is important to note that any tables that have a Guest Check still open will be represented as an "Occupied" table. Ownership of the Guest Check is NOT removed or changed when executing this function.

Follow these steps to deactivate a layout.

1. Click the **More…** button.
2. Select the **Deactivate Layout** option.
3. Any assigned sections or tables disappear from the display.

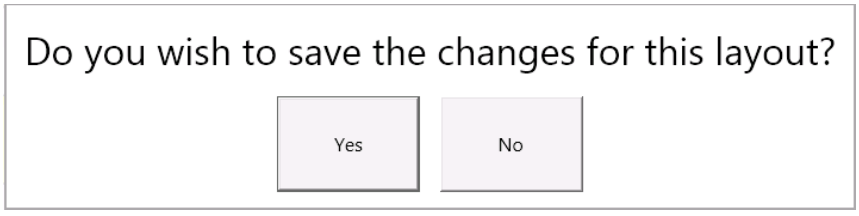
Close / Delete Layout

Closing a Section Layout

Follow these steps to close a layout and return to the active layout.

1. To close the layout you are currently working on, click the **Close Layout** button.

> *If the layout has any changes that were not saved, you will be prompted with an option to save the changes or to cancel without saving. This step will also be important to execute if you have a layout actively in use on the same page and need to return to the current view from the edit view.*



Deleting a Section Layout

Follow these steps to remove a layout that is no longer needed. The layout will be deleted from the list of available layouts.

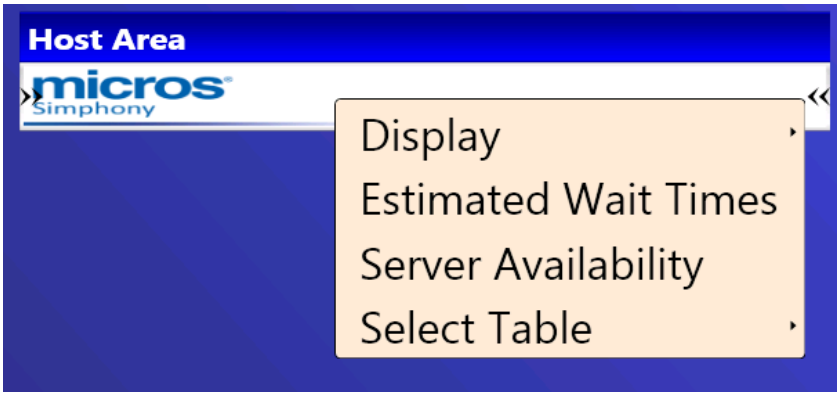
1. Click the **More…** button.
2. Select the **Delete Layout** option.
3. On the Deleted Section Layout dialog, select the layout you wish to remove.
4. Click the **OK** button to confirm the deletion.

Host Command Features

Host Area

In most cases, the Hosting page will have been created with a designated Host Command module (Host Area). This Host Area contains many of the functions that are utilized by hosting staff and managers to administer all aspects of the Table Management System.

1. To access these functions, long-press and hold the Host Area until they appear.
2. From the list, select the option you wish to use.



Display

You can show or hide any of the dialogs or items listed below. Those sections that are not configured to use from the Host Area will be grayed out.

- Show Legend
- Show/Hide Dining Table Status
- Show/Hide Reservation List
- Show/Hide Employee Lines
- Show/Hide Wait List
- Show/Hide Section Layout
- Show/Hide Sections
- Show/Hide Table Decorators
- Show/Hide Employees

Legend

From the long-press options in the Host Area, select the **Display | Show Legend** option. The Legend Area provides information on the various visual features of the Table Management System.

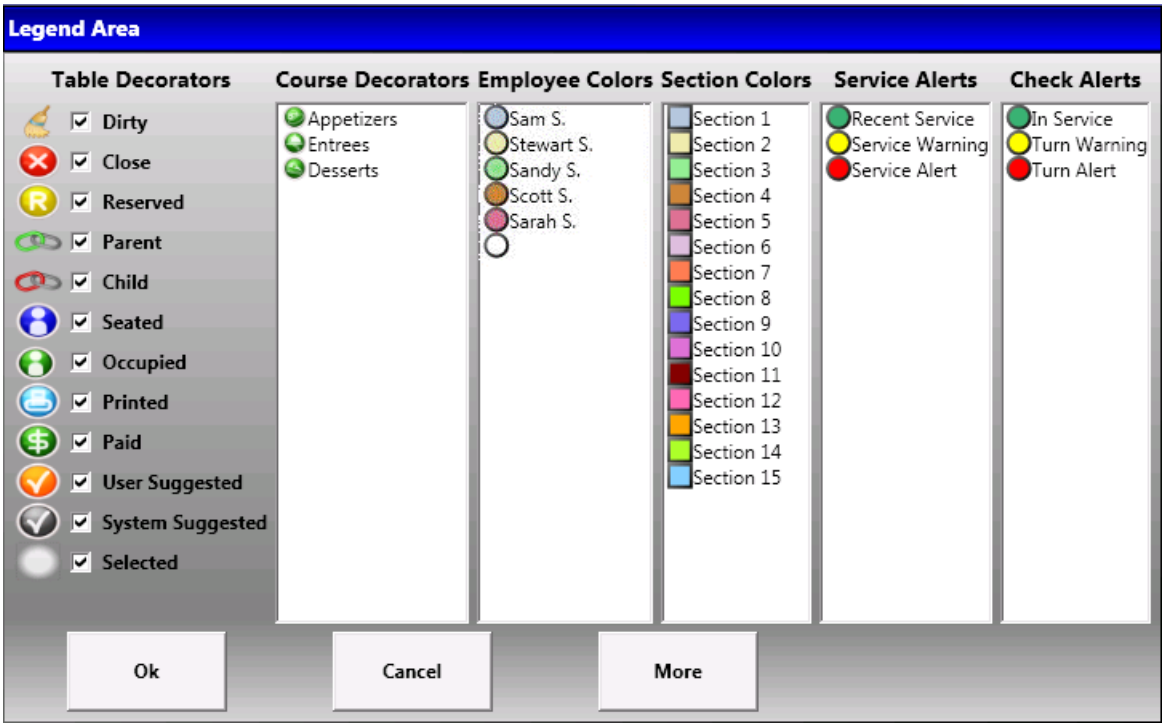


Table Decorators

The decorators are used to indicate one or more statuses the table may currently be under. A decorator may cover all or a portion of the table in the Dining Table Layout screen. You can hide certain decorators by removing the check mark next to the decorator before clicking the **OK** button. The various table decorators are predefined in the system.

- Clean – Table is clean.
- Dirty – Table is dirty.
- Close – Table is closed.
- Reserved – Table is reserved.
- Parent – Table is a parent to one or more child tables. This is the table that will be used as the primary table when joining tables.
- Child – These tables are joined to a parent.
- Seated – Table was recently seated.
- Occupied – Table is occupied by a guest.
- Printed – A Guest Check has been printed for the guests at this table.
- Paid – The Guest Check on this table has been tendered.
- User Suggested – This is the table that the user or guest specifically requested as part of the reservation or wait request. This will only be presented when a request waiting to be seated is selected.
- System Suggested – This is the table that the system suggests the reservation or wait request be seated at based upon configuration to more efficiently manage all dining activities. This will only be presented when a request waiting to be seated is selected.
- Selected – This indicates the table has been selected and is available to have an action or update performed. More than one table can be selected. This table decorator cannot be hidden.

Course Decorators

Course decorators are used to show the current dining course that the guests on this table are within. Updates to the table occur as menu items are saved to the Guest Check or when a specific event occurs in the KDS (e.g., KDS order is bumped).

Employee Colors

To distinguish one employee from another, the Color assigned to the employee will be shown on the Host page. Any features within TMS that show the employee will utilize this color as the employee indicator. If no TMS Color is defined for the employee's Operator record, white will be used to identify the employee.

Section Colors

To indicate tables that are assigned to specific sections, a Section Color will be used as the base table color.

Service Alerts

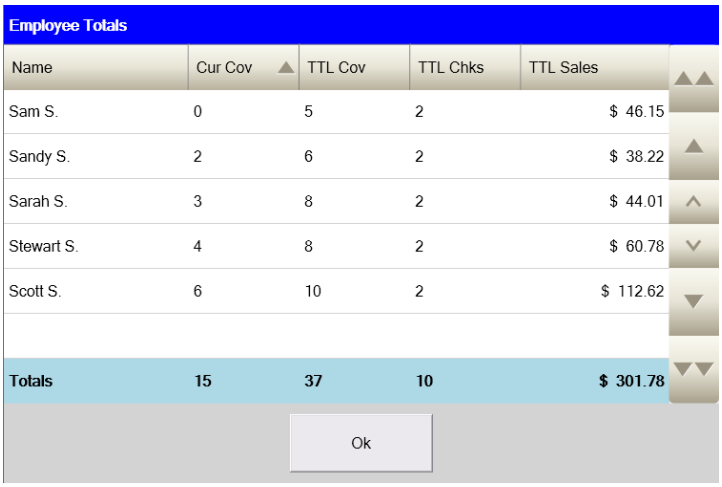
Service Alerts have the ability to change the color of the Alert window, depending on the length of time that has elapsed since an action was performed on the Guest Check for the table. Whenever an action is performed, the Service Alert is reset and the counter starts at 0. The Service Alert will also show the current Cover Count on this table. If more than one Guest Check is open on this table, it will also show the number of checks along with the Cover Count of all checks.

Check Alerts

Check Alerts have the ability to change the color of the Alert window, depending on the length of time that has elapsed for the life of the Guest Check on the table. This gives an indication as to how long the table has been occupied and if it is expected to be available soon. The Check Alert will show (in hours:minutes) how long the table has been occupied.

Employee Totals

When clicking the **More…** button on the Legend Area, the *Employee Totals* window appears. Employee Totals provides you with information about the current workload and statistics for those Servers that are currently assigned to tables in this Revenue Center. Clicking the **OK** button will close the Employee Totals window and return you to the Legend.

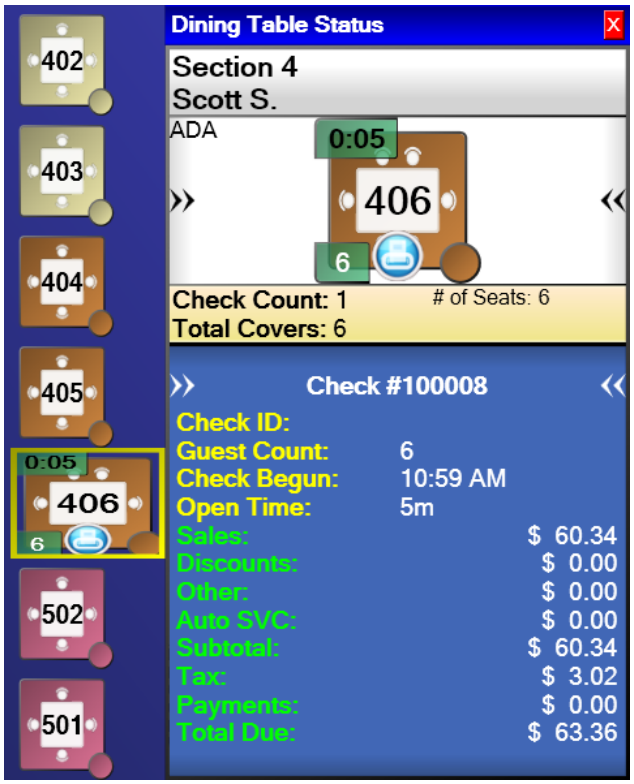


The following information displays on the *Employee Totals* window for each employee that is currently assigned to this Revenue Center:

- Check Name
- Current Cover Count of Open Checks for Today's Business Date
- Total Cover Count for all Checks—Open or Closed—for Today's Business Date
- Total Number of Checks—Open or Closed—for Today's Business Date
- Total Net Sales for all Checks—Open or Closed—for Today's Business Date

Dining Table Status

The *Dining Table Status* dialog provides detailed information about the table and any Guest Checks that are open on the table. This dialog can be managed on its own page or optionally as a popup dialog in the host view (from the long-press options in the Host Area, select the **Display | Show Dining Table Status** option).



The Dining Table Status screen supports gesture swipes. The >> and << arrows indicate that the area can be swiped through (either left and right or up and down). By swiping your finger on the screen from left to right it will cycle through information on the Guest Check. If multiple checks are present on the table, a top and bottom gesture option will be presented that allows you to cycle through any of the Guest Checks on the table.

Details on the following data can be seen on the *Dining Table Status* screen.

- Table Details
  - Current Section Assignment
  - Current User Assignment
  - Table Image with Table Name and Decorators
    - A set of navigation icons facing left and right will appear. To cycle through each of the tables, swipe the icon in the direction it is pointing to advance one table at a time.
  - Current Seating Capacity
  - Associated Child Tables (if parent)
    - When two or more tables are merged and the parent table is selected, the *Dining Table Status* screen shows information about the child table. When a child table is selected, the *Dining Table Status* screen shows information about the parent table. If a parent table has more than one child table, the first child table is shown in the *Dining Table Status* screen, followed by an ellipsis (…).
- Check Details
  - Current Check Count

- If multiple checks are associated to the table, a pair of navigation icons facing up and down will appear. To cycle through each of the checks, swipe the icon in the direction it is pointing to advance one check at a time.

- Current Cover Count
- Financials (per check)
- Current Course & History (per check)
  - To view the Course History, a set of navigation icons facing left and right will display in the Check Details portion of the *Dining Table Status* screen. To cycle from the Financials to the Course History, swipe the icon in either direction to advance.

To hide the *Dining Table Status* screen, long-press on the Host Command area and select the **Hide Dining Table Status** option.

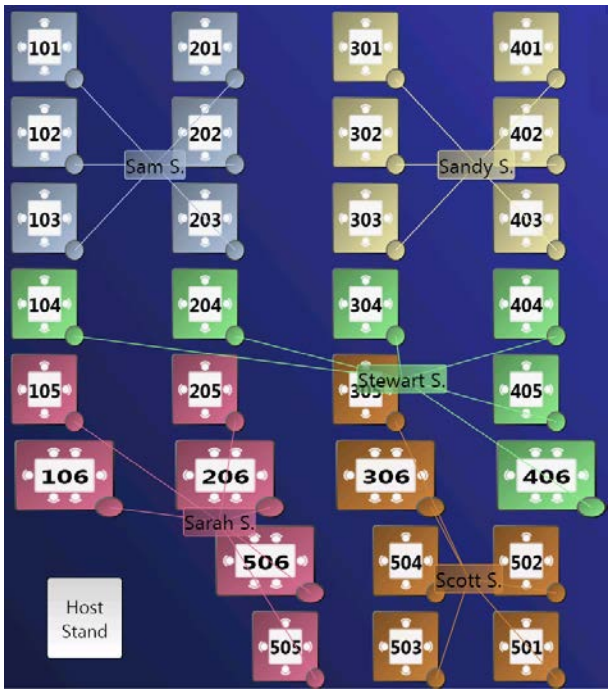
Reservation List

The Reservation List provides you with a form to add new reservation requests and a place where reservations will be shown for all future scheduled arrivals. This form can be managed on its own page or optionally as a popup form in the host view (from the long-press options in the Host Area, select the **Display | Show Reservation List** option).

To hide the *Reservation List* (if available) from the Host Command screen, long-press on the Host Command area and select the **Hide Reservation List** option.

Employee Lines

Once employees are assigned to tables and section(s), an optional Employee Lines feature provides you with a quick way to see the current table assignments. From the long-press options in the Host Area, select the **Display | Show Employee Lines** option. From the employee name label, a line will be drawn to the Employee Indicator on the table.



To hide the *Employee Lines* (if available), long-press on the Host Command area and select the **Hide Employee Lines** option.

Wait List

The Wait List provides you with a form to add new Wait List requests and a place where reservations will be shown prior to their scheduled arrival. This form can be managed on its own page or optionally as a popup form in the host view (from the long-press options in the Host Area, select the **Display | Show Wait List** option).

To hide the *Wait List* (if available) from the Host Command screen, long-press on the Host Command area and select the **Hide Wait List** option.

Section Layout

The Seating Section Layout provides you with the ability to quickly choose those tables that are to be utilized in the Revenue Center and provide them with the appropriate section and employee assignment. This form can be managed on its own page or optionally as a popup form in the host view (from the long-press options in the Host Area, select the **Display | Show Section Layout** option).

To hide the *Section Layouts form* (if available) from the Host Command screen, long-press on the Host Command area and select the **Hide Section Layout** option.

Table Information

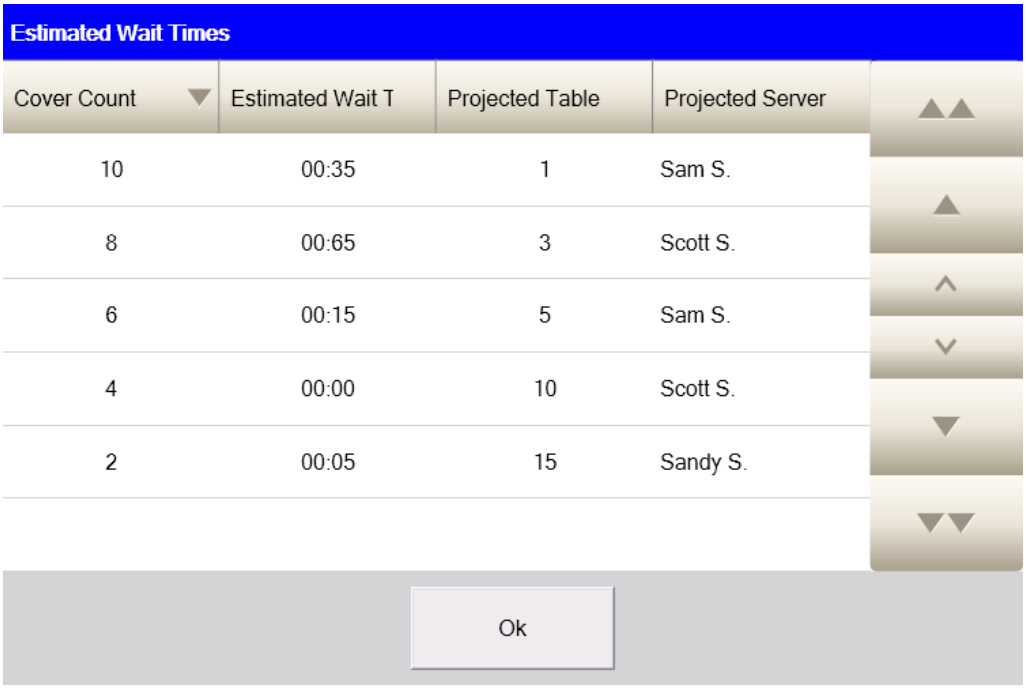
The on-screen table provides you with a visual indication of the current table/check status as well as assignment information. This information is show by default but can be hidden. To hide the *Section Color* from the table, long-press options in the Host Area, select the **Display | Hide Sections** option. You may return the Section Colors by selecting the **Show Section** option from the Host Command area.

To hide the *Table Decorators* which show table and Guest Check status, long-press on the Host Command area and select the **Hide Table Decorators** option. You may return the Table Decorators by selecting the **Show Table Decorators** option from the Host Command area.

To hide the *Employee (Colored Dot) from the table*, long-press on the Host Command area and select the **Hide Employee** option. You may return the Employees by selecting the **Show Employees** option from the Host Command area.

Estimated Wait Times

The Estimated Wait Times option shows the estimated amount of time remaining until the system anticipates each request being seated.



1. Long-press on the Host Area and select **Estimated Wait Times**.
2. The information listed below appears.

   - Cover Count
     The number of people that can be seated at the table.

   - Estimated Wait Time
     Estimated time remaining until a table is available for the cover count.

   - Projected Table
     System suggested table number for the request.

   - Projected Server
     If employees are assigned to tables, the probable server is listed.

3. Click the **OK** button to close the Estimated Wait Times list.

Sever Availability

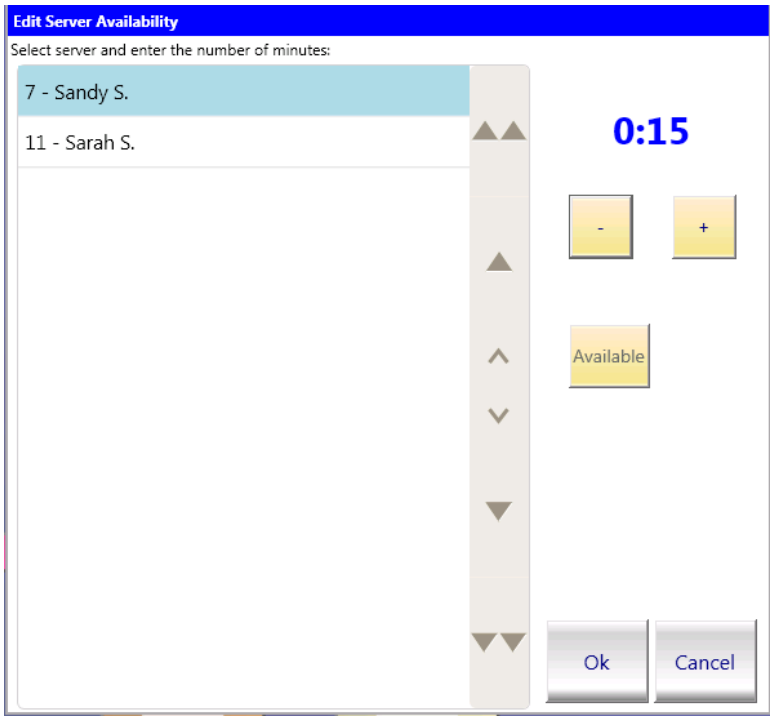
This option allows you to place an employee as "unavailable" for a set duration of time. By making the employee unavailable, they are not included in any table assignments that Simphony might define for the seating of parties.

Follow these steps to mark a server as unavailable for 15 minutes.

1. Long-press on the Host Area and select the **Server Availability** option.

> *If you do not have the **Edit Server Availability** option checked in EMC, you will be prompted for authorization.*

2. The Edit Server Availability dialog appears. This list shows employees that are currently active in Simphony and assigned to a table in the Revenue Center.
3. Select an available employee from the list
4. Use the **-/+** buttons to optionally change the length of time during which the selected server will be unavailable.
5. Click the **OK** button.



6. The employee list closes and the employee will be marked as unavailable for 15 minutes (or whatever time you set). After 15 minutes has elapsed, the server is automatically marked as available for any assignments.

To mark an unavailable server as available before the time duration elapses, repeat steps 1-5, but click the **Available** button rather than the **-/+** buttons.

Select Table

The ability to select one or multiple tables on the Host page is provided in two ways.

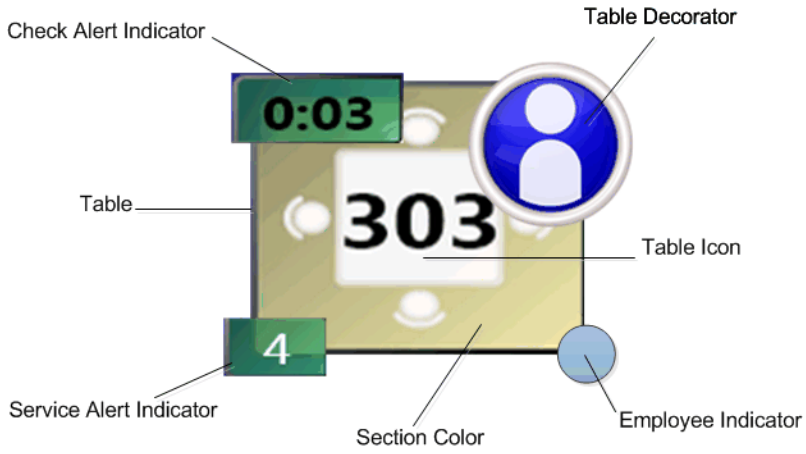
- Table Touch
  From the Host page, single touch on one or more tables. If a decorator has been defined for "Selected", this will be shown on the table(s).
- Select Table Option
  From the long-press options in the Host Area, a **Select Table** option appears. This provides you with a way to select
  - All Tables
  - None (a quick way to unselect all tables)
  - By Employee(s) (only those tables assigned to one or more employees)
  - By Section(s) (only those tables assigned to one or more sections)

Table Features

Before discussing the features available from the tables, let's take a look at the contents of the table. The features that are available from the table will differ depending upon the current state of the table (open, closed, etc.).

Table Status Example

Enhanced tables are used with TMS to provide graphical images representing various dining statuses and indicators. The example table shown below illustrates several of the status and indicator icons that may be present on a seated table.



Open Tables

To display the table functions that are available on an Open table, long-press on a table where no guests are seated. The following options appear:

- Begin Check
  Creates a new Guest Check on the selected table.

> *Use of the Begin Check function from the table does NOT include the Guest Check as part of the reporting for TMS. It is not recommended that a Guest Check be started from this function.*

- Assign Section
  Assign the table to a different section. This section override is only valid for the duration of time in which the current section layout is active. When a new section layout is activated, the override will be cleared.

- Select Employee
  Assign the table to a different server. This employee override is only valid for the duration of time in which the current section layout is active. When a new section layout is activated, the override will be cleared.

- Set as Clean
  Mark a table as clean and show the "Clean" table decorator. A clean table is available for seating.

- Set as Dirty
  Mark a table as dirty and show the “Dirty” table decorator. A dirty table is unavailable for seating until it is marked “Clean”.

- Close Table
  Mark a table as closed and show the “Closed” table decorator. A closed table is unavailable for seating.

- Reserve Table
  Mark a table as reserved for a party arriving in the near future and show the “Reserved” table decorator. A reserved table is not suggested by the system when seating from the Wait List.

- Merge Table
  Join two or more tables. You will be prompted to select the table to merge into. The tables will remain merged until the section layout is deactivated or a different layout is activated. Both parent and child tables will be updated with a table decorator. You may be prompted to indicate the number of seats available with the newly merged tables. The cumulative number of seats between all merged tables will be shown by default.

- Change Table Capacity
  You may be provided an option to change the current seating capacity of a table. The tables will retain the overridden capacity until the table is updated manually or as part of a section layout activation/deactivation.

Occupied Tables

To display the table functions that are available on an Occupied table, long-press on a table where a Guest Check is currently open. The following options appear:

- Begin Check
  Adds an additional new Guest Check on the selected table.

> *Use of the Begin Check function from the table does NOT include the Guest Check as part of the reporting for TMS. It is not recommended that a Guest Check be started from this function.*

- Pickup Table (Check #)
  Pick up an existing Guest Check on the table. If the Check is picked up, ownership of the Check is transferred to the user performing the pickup.

- Unseat Table (Check #)
  Returns the guest to the Wait List and makes the table available. If a Guest Check was already on the table, it will be lost.

- Assign Section
  Assign the table to a different section. This section override is only valid for the duration of time in which the current section layout is active. When a new section layout is activated, the override will be cleared.

- Select Employee
  Assign the table to a different server. This employee override is only valid for the duration of time in which the current section layout is active. When a new section layout is activated, the override will be cleared. If there is a pre-existing Guest Check on the table, that Guest Check remains with the original employee.

- Set as Clean
  Mark a table as clean and show the "Clean" table decorator. A clean table is available for seating.

- Set as Dirty
  Mark a table as dirty and show the "Dirty" table decorator. A dirty table is unavailable for seating until it is marked "Clean".

- Close Table
  Mark a table as closed and show the "Closed" table decorator. A closed table is unavailable for seating.

- Reserve Table
  Mark a table as reserved for a party arriving in the near future and show the "Reserved" table decorator. A reserved table is not suggested by the system when seating from the Wait List.

- Merge Table
  Join two or more tables. You will be prompted to select the table to merge into. The tables will remain merged until the section layout is deactivated or a different layout is activated. Both parent and child tables will be updated with a table decorator. You may be prompted to indicate the number of seats available with the newly merged tables. The cumulative number of seats between all merged tables will be shown by default.

Closed Tables

To display the table functions that are available on a Closed table, long-press on a closed table. The following options appear:

- Open Table
  Mark a table as open and remove the "Closed" table decorator. This makes the table available for seating.

- Change Table Capacity
  You may be provided an option to change the current seating capacity of a table. The tables will retain the overridden capacity until the table is updated manually or as part of a section layout activation/deactivation.

Other Features

Employee Section Assignment Report

The Employee Section Assignment Report provides the current employee section assignments for a particular Revenue Center in TMS, and can be printed on the local receipt printer. The report contains the information listed below.

- Report Name – "Employee Section Assignment Report"
- Property Name – The name of the property in which the report is being run
- User Name – Employee Name of the privileged user that is running the report
- Date/Time – Date and time the report was run
- Revenue Center – Name of the Revenue Center (only those Revenue Centers that have a section with associated tables are returned)
- Section – Name of the section (only those sections with associated tables are returned)
- Employee – Check Name of the employee(s) that are currently assigned to a table that is associated with the section. If multiple employees are assigned to tables within this section, a new line will be used for each additional employee.
- Tables – The Table Names that are associated with the Section. If more than one table is defined for a section, each of the table names will be separated by a comma. If more tables are defined to a section than can fit within the available report width, the report will wrap this information to the next line without repeating the "Table" label on any additional lines.

Follow these steps to run the Employee Section Assignment Report:

1. Open the Reports list.
2. Select the **Employee Section Assignment Report** or enter the Report Number and select **OK**.
3. The Reports form displays. You may optionally change the Revenue Center in the View field.
4. Click the **Run Report** button.

> *If you do not have privileges to run this report, a message displays and you will be returned to the Reports form.*

5. The report is generated for the selected Revenue Center. Results are shown in the Print, Display, and Stats tabs of the Reports form.
6. If you would like to print the report, click the **Print** button. The results are sent to the local receipt printer.
7. Click the **Close** button to close the Reports form.

The following examples depict an Employee Section Assignment Report layout as it is represented when viewed or printed:

Single Revenue Center

Employee Section Assignment Report
Property Name
Ms Manager

Printed On: 10/16/2013 3:29:33 PM

Dining

Section 1
Sam S.
Tables: 103, 201, 202

Section 2
Sandy S.
Tables: 301, 302, 303, 401, 402, 403

Section 3
Sarah S.
Tables: 104, 105, 204, 205, 206, 106

Section 4
Stewart S.
Tables: 304, 305, 306, 404, 405, 406

Section 5
Scott S.
Tables: 501, 502, 503, 504, 505, 506

All Revenue Centers

Employee Section Assignment Report
Property Name
Ms Manager

Printed On: 12/16/2013 7:30:59 PM

Dining

Section 1
Sam S.
Tables: 103, 201, 202

Section 2
Sandy S.
Tables: 301, 302, 303, 401, 402, 403

Section 3
Sarah S.
Tables: 104, 105, 204, 205, 206, 106

Section 4
Stewart S.
Tables: 304, 305, 306, 404, 405, 406

Section 5
Scott S.
Tables: 501, 502, 503, 504, 505, 506

Patio

Section 1
John J.
Tables: 106, 207, 208

Section 2
Jenna J.
Tables: 307, 308, 309, 407, 408, 409

Section 3
Jason J.
Tables: 107, 108, 209, 210, 211, 212

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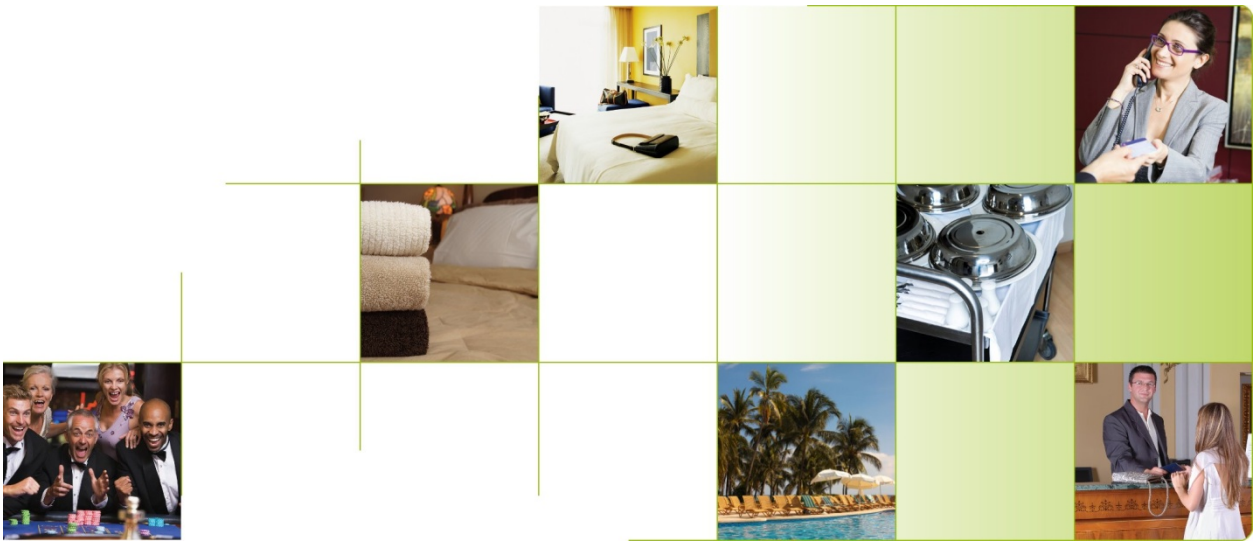
Simphony



Simphony Wait List User Guide

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Document Author: Simphony Product Management Documentation

MICROS Systems, Inc.
7031 Columbia Gateway Drive
Columbia, MD 21046
(443) 285-8000 / Fax: (443)-285-6505

About This Document

This guide provides a comprehensive understanding of the features and functions that have been introduced with the new Wait List module in Simphony v2.6.

This document contains features available for the Version 2.6 release of the MICROS Simphony software.

Who Should Be Reading This Document

This document is intended for the following audiences:

- MICROS Installers/Programmers
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes the reader has the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of basic network concepts

Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version
Rev A	January	2014	2.6.0

Document Organization

For clarity, information is divided into self-contained chapters, reflecting the usage of the following Wait List functions:

- Prerequisite Configuration
- Wait List Feature Usage
- Wait List Icons

For more information about these features and step-by-step instructions to configure them, refer to the *Simphony Wait List Configuration Guide*, available from the MICROS website.

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Prerequisite Configuration

Simphony Wait List

To support the acceptance and seating of reservations, the Simphony Wait List will be required. Please refer to the *Simphony Wait List Configuration Guide* for instructions about how to configure the Wait List.

Simphony Reservations

To support the acceptance and seating of reservations, the Simphony Reservation List will be required. Please refer to the *Simphony Reservations Configuration Guide* for instructions about how to configure the Reservation List.

Simphony Table Management

To support the taking of reservations, the Simphony Table Management System (TMS) will be required. Please refer to the *Simphony Table Management System Configuration Guide* for instructions about how to configure TMS.

Wait List Feature Usage

Wait List

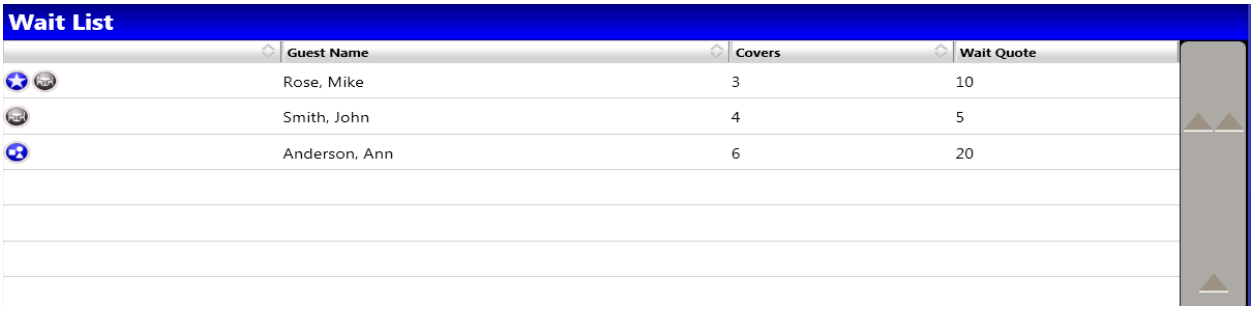
The Wait List contains all wait requests for the Revenue Center. Many times a guest will arrive and ask if there is table seating available. In those cases where tables are not immediately available for seating, the guest may request a wait time and then be added to a Wait List.

The Wait List also provides a place where reservations will be shown just prior to their scheduled arrival. Reservations will be displayed on the Wait List a configurable number of minutes prior to their schedule seating time.

Users with access to the Wait List can create, edit, and cancel wait requests from this list.

This form can be managed on its own page or optionally as a popup form in the host view (from the long-press options in the Host Area, select the **Display | Show Wait List** option). For simplicity of use, it is recommended that a Wait List be present on the same page as the tables to allow for quick seating.

The example shown below contains three wait requests. Please refer to the Wait List Icons section at the end of this document for a description of all icons used on the Wait List.



The Wait List — depending on how it was configured — can display certain information in columns. The width and order of each column is configured in EMC.

- Abandoned Time
  This column shows the date and time when the request was abandoned from the Wait List.
- Alert Icons (always shown)
  These icons indicate status or special considerations about the wait request or reservation.
- Confirmation Number
  This column shows the confirmation number that was issued to the reservation request.
- Covers
  This column shows the number of people to be seated with this request.
- Creation Date
  This column shows the date and time the request was created.
- Greeted Date
  This column shows the date and time the reservation was greeted.
- Guest Name (always shown)
  The column displays the name of the guest as entered.
- Pager Number
  This shows the pager number that was assigned to the guest when they were greeted.
- Phone Number
  This column displays the phone number that was entered for the request.
- Request Method
  This column shows the source of the reservation request (i.e., Phone Ahead, internet).
- Time (always shown)
  This column shows the time that the reservation request is scheduled to be seated.
- Wait Quote
  This column shows the amount of time the guest was quoted when the wait request was made, or the amount of time a reservation had from the time they were greeted to the time they are scheduled to be seated.

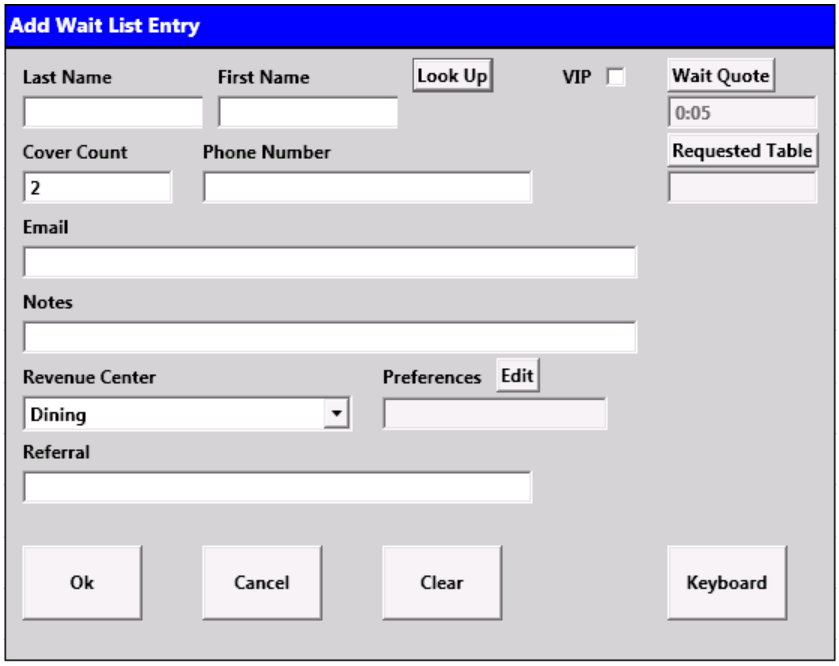
Add New Wait List Entry

To determine the current wait time for the guest, you will need to know the Cover Count for their party. Once you have this information, perform the following steps.

1. Double-touch quickly on the Wait List or click the **Add Wait List** button to create a new wait request.

> *As more wait requests are created for a specific date, the space available on the Wait List decreases. There is a designated space at the bottom of the list that will always remain empty to allow the creation of new requests.*

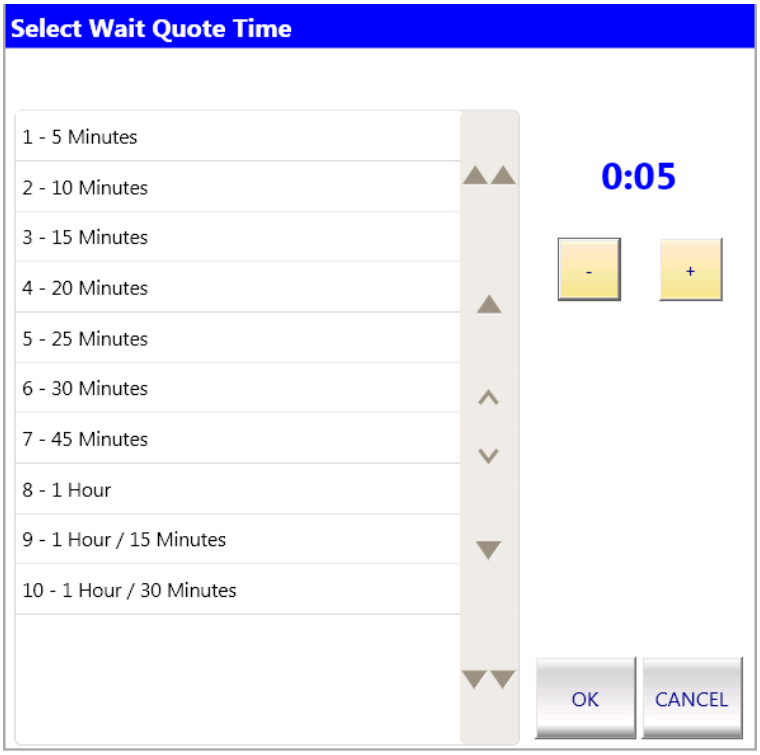
2. The Add Wait List Entry form appears.



3. Enter the number of people in the Cover Count field and advance to the next field (tab/touch).
4. The Wait Quote field will automatically update to the estimated quote time. The estimated quote time is the amount of time before the system expects a table to be available that can accommodate the covers entered. Wait quotes are automatically calculated by the system when the request is first entered. Quotes are based on availability, guest preferences (if any), and calculated turn times. This is the quote time you can provide to the guest.

    a. Click the **Wait Quote** button to override the quote value defined by the system.

b. The Select Wait Quote Time dialog shows a list of times based on pre-defined increments.



c. Select the desired quote time from the list or use the **+ / -** buttons to increase/decrease the wait quote time.
d. Click the **OK** button to close the Select Wait Quote Time dialog and return to the Add Wait List Entry form.

Estimated wait times can be obtained prior to opening the Add Wait List Entry form from the Host page. Please refer to the Simphony Table Management User Guide for details about this feature.

5. If the guest has chosen not to wait, click the **Cancel** button to close the form.
6. If the guest has chosen to wait, enter information about the guest using any of the fields and buttons listed below.

*You can enter data using either a keyboard and/or mouse that are physically attached to the workstation in which the request is being entered. Alternately, a **Keyboard** button has been provided on the Add Wait List Entry form. Selecting this button will present an on-screen entry window that is based upon the accepted values for the field that you are currently entering.*

- Name (required)
  The First Name, Last Name, or both can be entered into these fields. The value(s) entered will be used on the request and included on any Guest Check that is opened from this request.

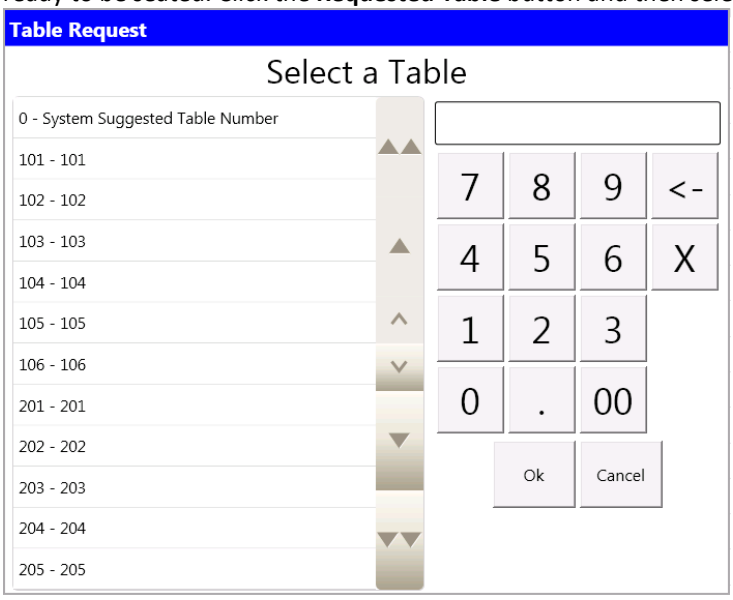
- Look Up
  If a Loyalty application such as Simphony Loyalty is used, you can look up and associate a guest's loyalty account with their wait request.

- VIP
  This option allows you to mark the guest as a VIP for the request.

- Cover Count (required)
  The number of persons in the party that will require seating when the request is seated.

- Phone Number
  The guest phone number that can be used to contact the guest should there be any questions or problems with the request.

- Requested Table
  In those cases where the guest has a specific table request, the Table Request feature allows for the flagging of a table number as User Suggested. This does not guarantee the table number; rather it increases the likelihood that the table will be selected when this guest is ready to be seated. Click the **Requested Table** button and then select a table.



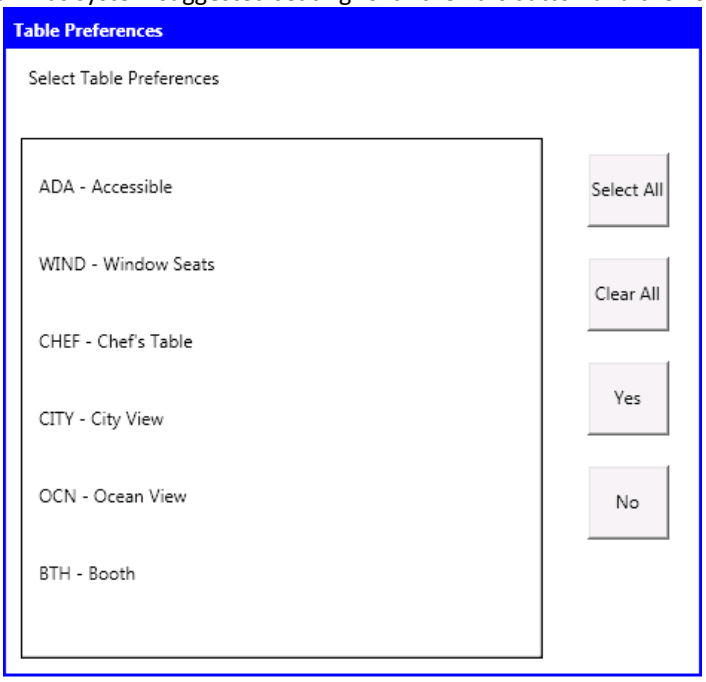
- Email
  If the guest provides an e-mail address, they may receive future promotions from your property.

- Notes
  This is an open field to enter any special notes that should be provided to the staff working this request. Typical examples of notes include Birthday, Anniversary, allergic to shellfish, etc.

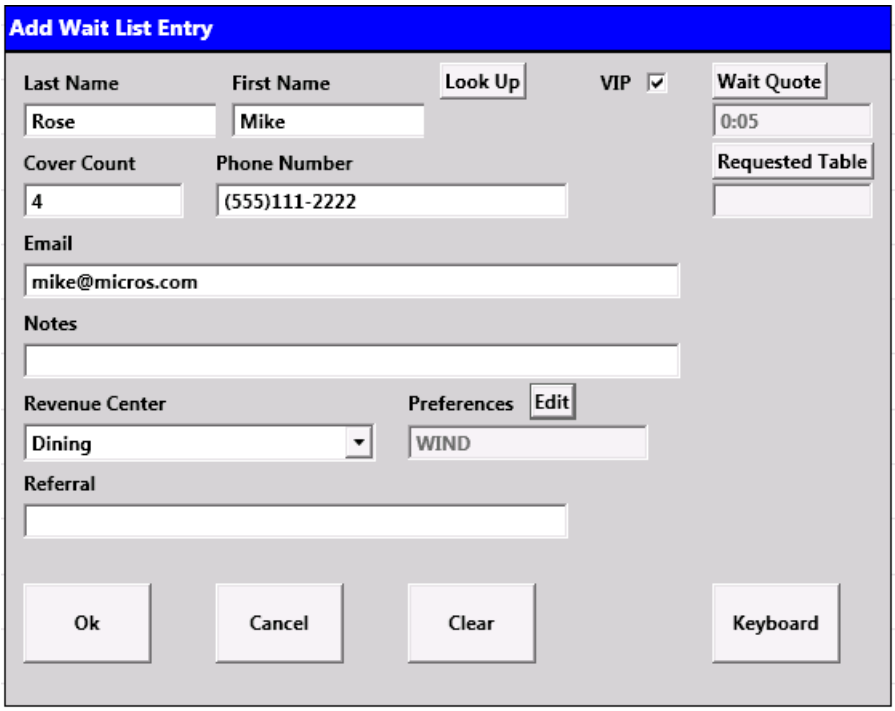
- Revenue Center (required)
  If the property is configured to support Wait List requests across multiple revenue centers, a list of those revenue centers will be provided. This allows a user in the Dining Room to make a request for a guest in another revenue center at the property.

> *If you change the revenue center after having defined a wait quote, the Wait Quote for the new revenue center should be updated. This information should be provided to the guest.*

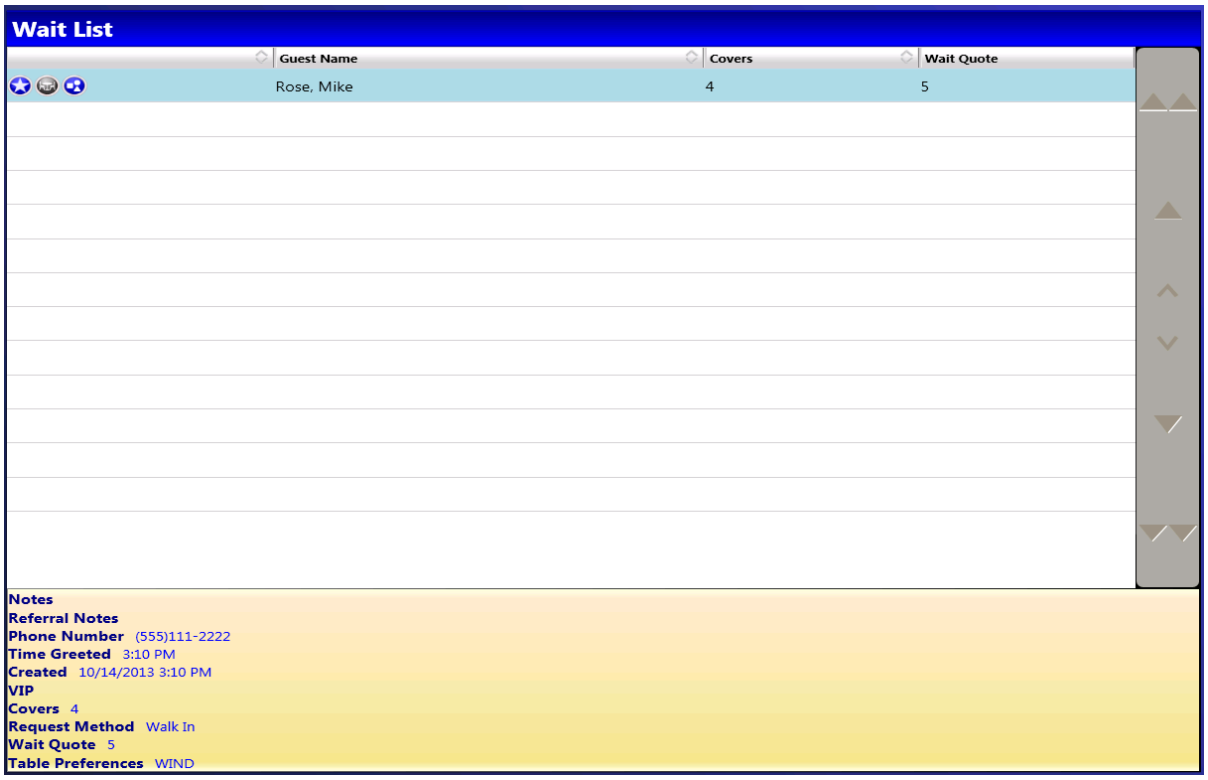
- Preferences
  If the guest has a table preference they would like to include such as Smoking, Patio, Booth, Window Seat, etc. these can optionally be included in the wait request. If a table preference is exclusive (e.g., handicapped accessible), only those tables that meet this criteria will be shown as system suggested seating. Click the **Edit** button and then select a table preference.



- Referral
  The referral field allows for documentation of any referral sources such as Taxi Services, Hotel Concierge, or Advertisements.



7. Once the information for the guest's wait request has been completed on the Add Wait List Entry form, touch the **OK** button to save.
8. The Add Wait List Entry form closes and a new wait request record for the guest displays on the Wait List.



9. A Wait List chit may optionally print on the local printer when the request is created or updated. This chit contains information about the table request (i.e., guest name, revenue center where they will be seated, party size, greeted time, and estimated wait quote time).

Show / Hide / Modify Summary Area Information

When a wait request or reservation is highlighted on the Wait List, a summary area can display (if configured) at the bottom of the Wait List. The Summary area can contain the following information for a request.

- Abandoned Time
  If the guest left before being seated, this summary option shows the date and time when the request was abandoned from the Wait List.

- Confirmation Number
  This summary option shows the confirmation number associated with the reservation request.

- Covers
  This summary option shows the number of people to be seated with this request.

- Creation Date
  This summary option shows the date and time the request was created.

- Estimated Wait Time
  This summary option shows the estimated amount of time remaining until the system anticipates the request being seated.

- Greeted Date
  This summary option shows the time the request was greeted by a hosting staff member.

- Notes
  This summary option shows any text that has been included in the Notes field for the request.

- Pager Number
  This summary option shows the pager number that was assigned to the guest when they were greeted.

- Phone Number
  This summary option shows the phone number associated with the guest.

- Referral Notes
  This summary option shows any text that has been included in the Referral field for the request.

- Request Method
  This summary option shows a text description (i.e., Phone Ahead, Internet) of the request method for the request.

- VIP
  This summary option displays “VIP” in the summary area if the request has been flagged as being a VIP.

- Wait Quote
  This shows the amount of time the guest was quoted when the wait request was made, or the amount of time a reservation had from the time they were greeted to the time they are scheduled to be seated.

Hide Summary Area

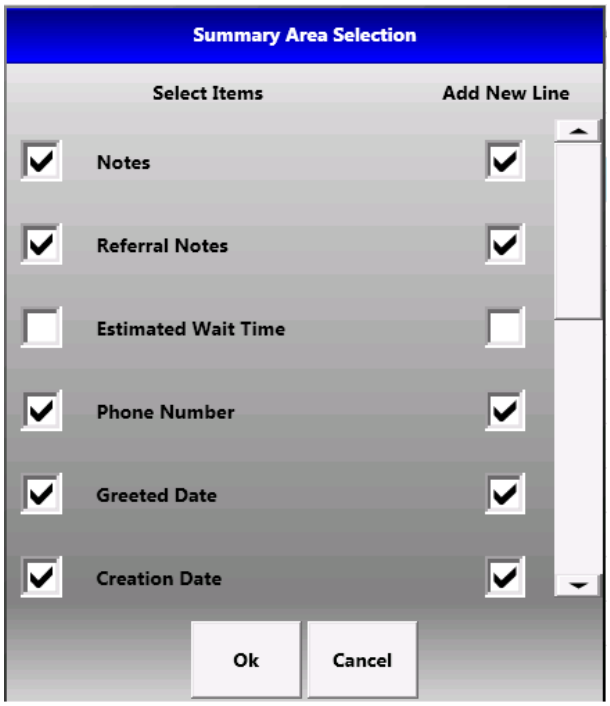
To prevent the summary area from displaying, long-press on a request and select the **Hide Summary Area** option.

Show Summary Area

To display the summary area, long-press on a request and select the **Show Summary** option.

Modify Summary Area

1. To change the summary area display, long-press on a request and select the **Modify Summary Area** option.
2. On the Summary Area Selection dialog, check/uncheck the desired fields on the left side.
3. To force the field to display on a separate line, check the corresponding Add New Line check box on the right side.



4. Click the **OK** button.

> *The example screenshot on page 11 shows the Summary Area with the selected information fields displayed on separate lines. If the information fields are not displayed on separate lines, the text wraps.*

Edit Wait List Entry

1. To edit a Wait List request, double-touch quickly on the line with the wait request or click the **Edit Wait List** button. This will open the request and allow you to make any changes.
2. Change any of the values described above in the section titled "Add New Wait List Entry".
3. Once the updated information for the guest's request has been completed, touch the **OK** button to save.
4. The Edit Wait List Entry form closes and the updated request record for the guest displays on the Wait List.

> *If a Wait List request is opened and updated on multiple workstations, the last record to be updated "wins" and reflects the changes.*

Sort Wait List

Click any of the column headings with up or down arrows (^v) to sort the Wait List:

- Icons (VIP)
  When sorted in ascending order, the VIP records sort in order by Creation Date.

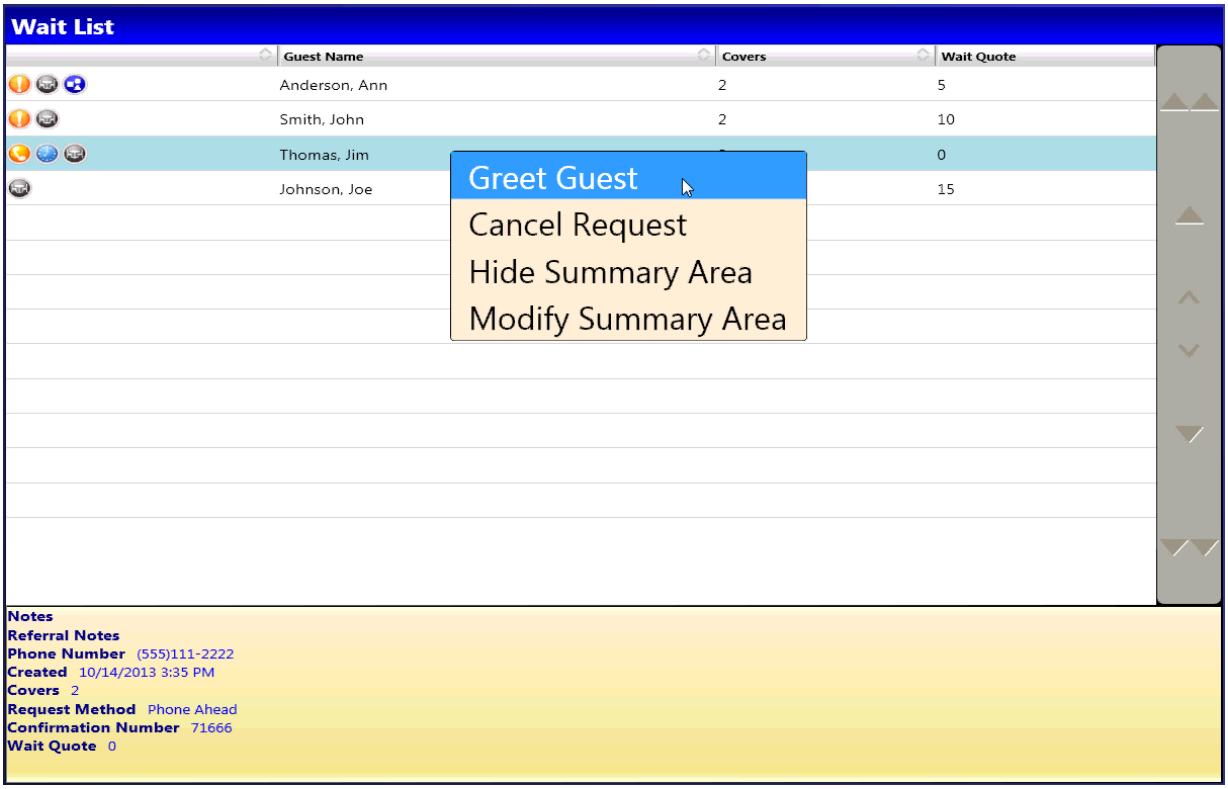
- Guest Name
  Toggles alphabetically by last name each time the column header is selected.

- Covers
  Toggles between ascending and descending each time the column header is selected.

Greet Guest / Abandon Request

Greet Guest

1. After a reservation has automatically moved to the Wait List, the **Greet Guest** option is available from a long-press on the reservation (you must have the **Greet Wait List Entry** permission).

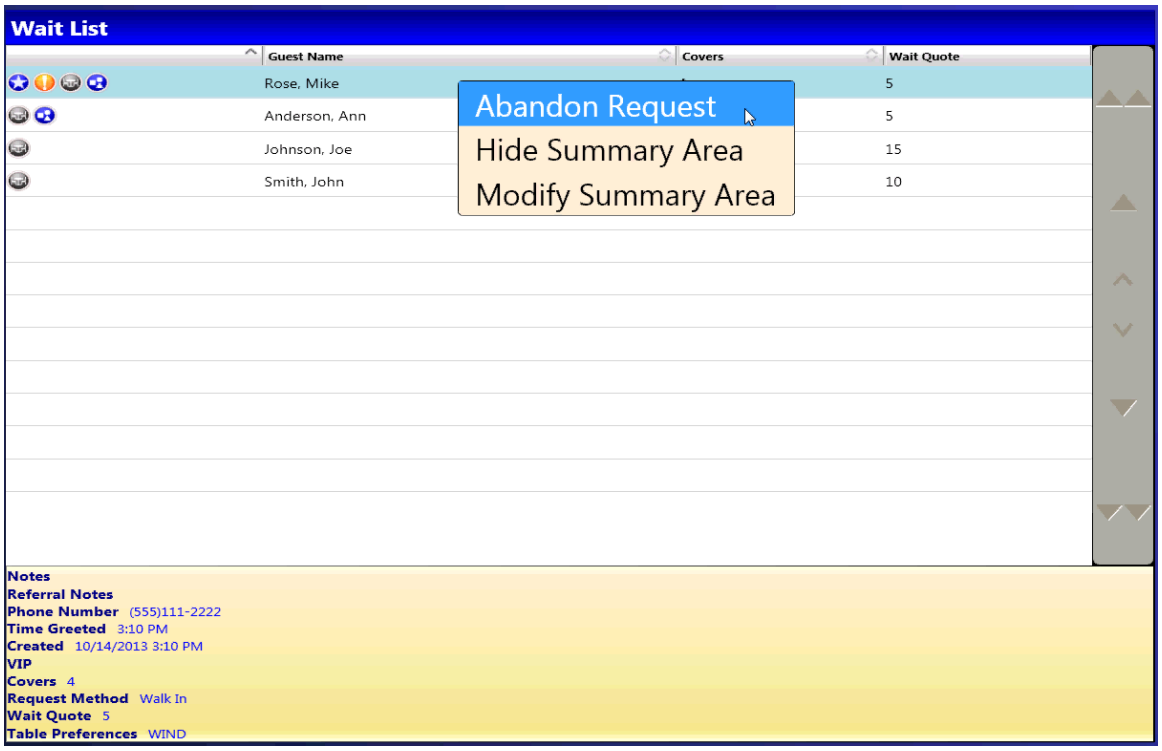


2. Select **Greet Guest** to mark the guest's reservation as greeted on the current Wait List.

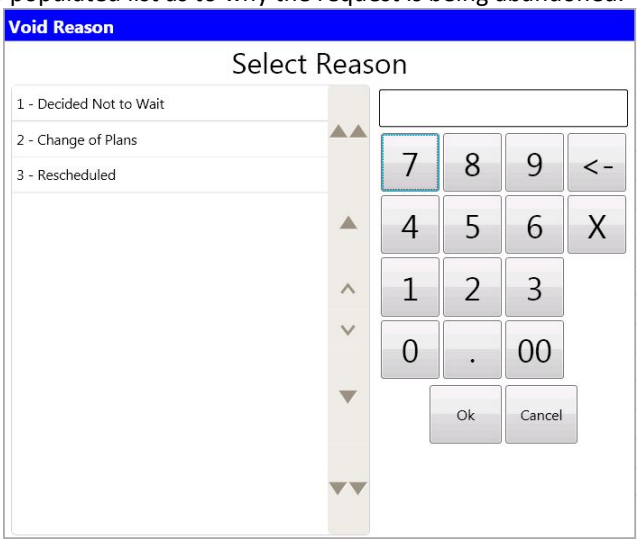
Abandon Request

If the guest changes their mind and decides they want to cancel their request before the wait time expires, you can mark the Wait List request as Abandoned. Requests that remain on the Wait List beyond the configured number of minutes are considered "Abandoned" and will automatically be removed from the Wait List.

1. Long-press on the request for a couple of seconds until a list of options appears.
2. From this list, select the **Abandon Request** option (you must have the **Abandon Wait List Entry** permission).



3. Depending on the configuration of your system, you may be prompted to enter a reason code from a pre-populated list as to why the request is being abandoned.



4. The request will disappear from the Wait List.

Seat

After a guest is displayed on the Wait List (either by adding a wait request or a reservation has moved to the Wait List), and a table is available for the guest, they can be seated. A guest may be seated using one of the two methods listed below.

- Seat from Wait List on Host Page
- Quick Seat

Each sub-section below explains these seating methods.

Seat from Wait List on Host Page

Perform the steps below to seat a guest from the Wait List on the Host Page.

1. Select the Wait List request.
2. A table is indicated by a check mark as suggested, either by the system or the user for the party to be seated.

   Depending on the configuration of your system, the table suggestion icons may be different.

3. Select the table where the guest will be seated.

   If you attempt to seat at a table which does not meet the system requirements or guest preferences, you may be prompted for authorization if you do not have the appropriate privilege.

   You may be prompted to select an employee to assign to the Guest Check if no server assignment is defined for the table.

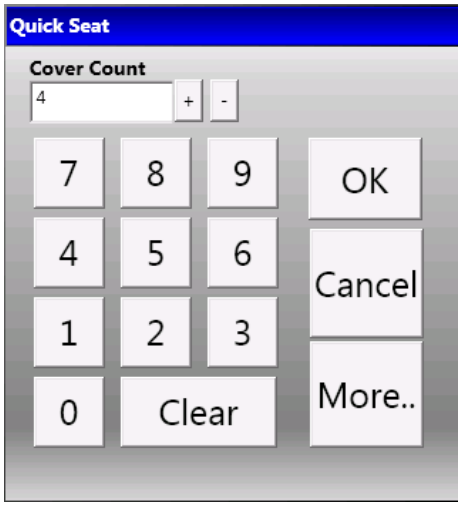
   Depending upon the configuration of your system, you may be restricted from seating a party that is smaller or larger than the selected table can accommodate. For example, when a user attempts to seat a cover count of 1 or 6 at a table whose minimum is 2 and maximum is 5, they may be prompted to confirm the cover count upon seating if permitted.

4. When prompted to "Begin a new guest check?", select **Yes**.
5. The party is seated at the table.
6. A Guest Information chit may optionally print on the local printer when the request is seated from the Wait List. This chit contains information about the table request (i.e., guest name, VIP, party size, revenue center where they are seated, table assignment, table preferences, server, date and time seated, and any special requirements made by the guest).

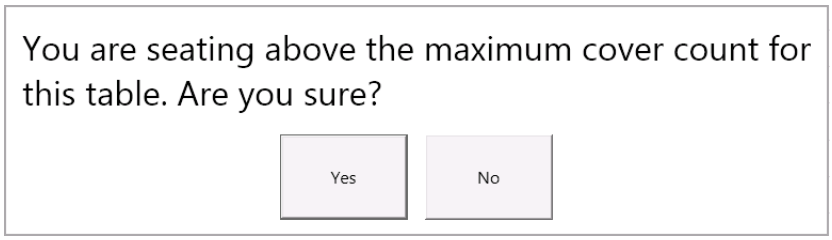
Quick Seat

The Quick Seat feature is a way to rapidly seat a guest without first adding them to the Wait List. Perform the steps below to seat a guest via Quick Seat.

1. Double-tap on the desired table. (Ensure that nothing is highlighted or selected on the Wait List.)
2. By default, the Quick Seat dialog displays the max table capacity for the selected table. Use the **+** / **-** buttons or keypad to change the cover count.



3. Select the **OK** button.

> *If you attempt to quick seat a guest with covers below or above the minimum/maximum table capacity, you will be prompted to confirm.*
>
> 
>
>
> *If you attempt to quick seat a guest at a table which does not meet the system requirements (e.g., table is unavailable or unassigned), you may be prompted for authorization if you do not have the appropriate privilege.*

4. After clicking the **Yes** button on the Quick Seat warning message (if necessary), the "Begin a new guest check?" prompt appears. Click the **Yes** button.
5. The party is seated at the table.

Unseat Table

If the guest wants to move to another table after being seated, you can unseat them and re-seat the guest at a different table.

1. Long-press on the table with the seated guest.
2. Select **Unseat Table**.

> *You can only unseat a table if menu items have not yet been ordered. Once a Guest Check is open on a table, the Unseat Table feature is not allowed.*

- If the guest was previously seated from the Wait List, the guest's name displays on the Wait List.
- If the guest was previously seated via Quick Seat, the guest displays on the Wait List as "QS" in the guest name column.

Wait List Seating Order

All seating requests on the Wait List will automatically move up or down in the list depending on the system configuration set by your property manager(s). It is recommended that you seat requests at the top of the list first, working down the list.

Wait List Icons

The following icons are used on the Wait List display. These icons are predefined in the system.

Icon	Icon Name	Description
	Call Guest	Guest has been paged by the Host
	Phone Reservation	A reservation that was created from a Phone-In request that has been greeted.
	Phone Reservation (Ungreeted)	A reservation that was created from a Phone-In request that has not been greeted.
	Internet Reservation	A reservation that was created from the Internet that has been greeted.
	Internet Reservation (Ungreeted)	A reservation that was created from the Internet that has not been greeted.
	VIP	Reservation is flagged as containing a VIP guest.
	Reservations	Not a request generated from a Wait List.
	Wait Quote Threshold Exceeded	The amount of time that the customer was quoted for a wait has been exceeded. The request is “Overdue” for seating.
	Table Ready	A table is now ready to seat this request.
	Table Preference	The wait or reservation record contains a request for a specific type of table.

Simphony 2.x Guest Check Headers and Trailers

Guest Check Headers and **Guest Check Trailers** are leading/trailing lines that can be programmed to print on guest checks. Typically, the Guest Check Header lines include the name of the Property and/or Revenue Center. The Guest Check Trailer lines generally display promotional information about upcoming events. At hotels, the Guest Check Trailers are often programmed to show Room Charge information for the customer to complete. Additionally, any header or trailer line may be programmed to print logos instead of text.

This article discusses functionality that relates to **Printing**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 EMC Configuration
  - 1.1 Descriptors
  - 1.2 Tender/Media
- 2 See also

EMC Configuration

Descriptors

The text (or logo) that prints is programmed from the EMC Home Page's Descriptors Tab, in the Guest Check Headers and Guest Check Trailers modules. For the Guest Check Header, up to three lines may be programmed to print; twelve lines are available for Guest Check Trailers. Guest Check Header and Trailer lines will center automatically unless the Format Parameters option **[Don't Center Header and Trailer Printing]** is enabled.

Tender/Media

Guest Check Headers print on Guest Checks automatically. Guest Check Trailers can be programmed to print per Tender/Media record. These options enable to Guest Check Trailer printing for a Tender/Media record:

22 - Print Check Trailer
: Select this option to print the guest check trailer lines at the end of the guest check.

28 - Print Guest Check Trailer on Fast Transaction Customer Receipt
: Select this option to print the guest check trailer on the customer receipt if this Tender/Media is used to close a fast transaction. If this option is not selected, no trailer will print for customer receipts. This option is unaffected by the setting of the Print Check Trailer option.

The following options may be enabled optionally, however it is typical that they are enabled:

20 - Print Sales Itemizers
: Select this option to print the sales itemizer lines on guest checks, customer receipts, and memo checks when this tender/media is used. Sales itemizer lines include the name of the sales itemizer, and the sales itemizer total. When this option is not selected, printing of the sales itemizer totals is suppressed.

21 - Print Summary Totals
: Select this option to print the summary totals (subtotal, tax, amount due, and change due) on guest checks, customer receipts, and memo checks when this key is used. When this option is not selected, printing of the summary totals is suppressed.

See also

- Logo Printing

Check and Receipt Printing	By-Round Guest Check ・ Guest Check Headers and Trailers ・ On Demand Customer Receipt ・ On Demand Guest Check ・ Print Customer Receipt
Learning series: Check and Receipt Printing	

Simphony Android Configuration

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- 1 Android™ on Simphony version 2
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    - 1.1.1 Devices
    - 1.1.2 Platform Versions
    - 1.1.3 Remote Support
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Android™ on Simphony version 2

Android Platform Support

Simphony version 2.7 and later can run on Android™ mobile devices. The Simphony Point of Service (POS) client operates in a similar way on an Android mobile device and a Microsoft Windows® device.

You can configure the POS client using the Enterprise Management Console (EMC), regardless of the platform. EMC manages the POS attributes, such as employees, menu items, discounts, taxes, and service charges for all Simphony client devices. System administrators use EMC to configure the pages (touchscreens) for all clients, and to deploy different user interfaces to Android devices than to traditional fixed place workstations.

Customers seamlessly move from one platform to the other because the user interface workflow is the same on all devices and workstations. Rules are consistent across all devices governing the sale of items, applicable discounts, and employee functions. However, Android devices have special requirements that users familiar with the traditional Microsoft platforms should consider. These differences include deployment methodology, configuration requirements, and the procurement process. Understanding these nuances and setting reasonable customer expectations ensures successful Simphony deployment with Android devices.

Devices

Several Android devices are available in the marketplace. Simphony is certified and supported with the devices listed in the following table.

Device	Tested	Supported
Google Nexus 7" Tablet	Yes	Yes
Samsung Galaxy Note 10"	Yes	Yes
Samsung S 10"	Yes	Yes
Samsung S 8"	Yes	Yes

Platform Versions

The following table shows the validation status of the Android versions available.

Version #	Version Name	Certified
4.1.x	Jellybean	No
4.2.x	Jellybean	No
4.3.x	Jellybean	No
4.4.x	KitKat	Yes

Remote Support

Simphony does not currently support remote access to the Android desktop for certified support applications (for example, Bomgar, RDP, and so on).

Application Functionality Support

Android devices are only capable of operating the Simphony POS Client application and cannot host shared services that other devices could access.

Android devices do not support the Check and Posting Service (CAPS). Therefore, the property must use at least one Microsoft-based device in addition to the Android device. MICROS recommends that this device be a MICROS Workstation 5a (POSReady) or MICROS PC Workstation 2015.

See the Simphony 2.x Platform Capabilities Matrix (http://downloads.micros.com/micros/simphony/Wiki/Docs/WhitePapers/Simphony_v2_Platform_Capabilities_Matrix.xlsx) for a comprehensive list of supported features, services, peripherals, and more for this platform.

Network Configuration Requirements

See the Simphony Android Best Practices Guide

(http://downloads.micros.com/micros/simphony/Wiki/Docs/WhitePapers/Simphony_Android_Best_Practices_Guide.pdf) for further instructions regarding the secure implementation of an Android device onto your POS network.

Wireless Network

Because the Android devices are connected wirelessly to Simphony using an 802.11x network, it is vital that the site have a high quality wireless network. Spotty Wi-Fi coverage causes application performance issues with check sharing and posting, as well as bouncing between online and offline states with the services on property (for example, check and posting, printing and kitchen display) and the enterprise, which impacts the ability to receive database updates.

You must configure the Android device to use a wireless local area network (WLAN) with connectivity to the LAN used by the Check and Posting Service and any other Simphony clients with which they may share checks. Simphony does not support the use of a 3G or 4G connection through a telecommunications provider back to these local devices.

Internet Protocol (IP) Address Configuration

MICROS recommends that you configure Android devices to use a static IP address. Simphony does 'not' support the use of Dynamic Host Configuration Protocol (DHCP) assigned addresses unless you define a DHCP reservation.

Payments

The Android clients support processing credit cards and other forms of electronic payments.

Credit Cards

Simphony comes with several credit card payment drivers that are installed with the application. The following table lists the drivers and their supported status with the Android platform.

Payment Driver	Supported
CAPMS	Yes
Elavon Fusebox	Yes
mCreditDebit	Yes
Shift4 DOTN	Yes
MerchantLink TV2G	Yes
VISA-D	Yes

Gift and Loyalty Cards

The MICROS Xprocessor (developed by MICROS Professional Services), which is typically used for third party gift cards like GIVEX, does not support Android devices. The loadable SVC and Loyalty modules, which are used with solutions like MICROS iCare and FreedomPay, support Android clients.

Product Installation

See the Simphony Android Installation Guide (http://downloads.micros.com/micros/simphony/Wiki/Docs/WhitePapers/Simphony_Android_Installation_Guide.pdf) for instructions to install CAL and ServiceHost on an Android device.

You can download a short video here [1] (http://downloads.micros.com/micros/simphony/LearningSeries/Simphony_Android_Installation.wmv) .

Device-Specific Configuration Constraints

Each Android model has different capabilities regarding the number of menu items, revenue centers (RVCs), pages, and so on. The following table contains the recommended maximum values for each device.

Device	RVCs	Menu-Item Definitions
Google Nexus 7" Tablet	1	10,000
Samsung Galaxy Note 10"	1	10,000
Others*	1	10,000

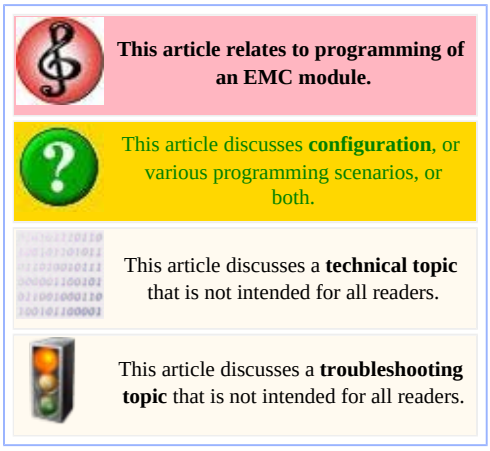
Configuration Management Tool

After you install Simphony on an Android device, use the Configuration Management Tool to view and edit certain files.

1. Launch the Simphony application.
2. While loading or after the application has loaded, perform the following tasks on the Android device:
    - On event (left swipe + right swipe + left swipe + tap + tap)
3. Enter the correct code based on the six-digit number shown at the top, and tap **Sign In**.
4. The Management Tool Home screen appears with the following options:
    - **View web.config.txt** - Tap to view and edit the web.config.txt file
    - **View config32.web** - Tap to view and edit the config32.web file
    - **View Log** - Tap to view the EGateway Log
    - **View LogZone** - Tap to view the LogZone_LoadHandlers.txt file, which is not editable
    - **Ping Server** - Tap to view the Server Name/IP Address
    - **Delete DataStore** - Tap to delete the DataStore database file and restart the application on the device
    - **Copy DataStore** - Tap to copy the DataStore database file within the device

Simphony CAL Troubleshooting

*This article reviews items to check when there are problems getting the **C**lient **A**pplication **L**oader (CAL) to download to a Workstation (WS), or getting the EMC to download to a remote client.*



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- 1 Checklist to review for problems with CAL at a Workstation
- 2 Troubleshooting Steps
  - 2.1 Off-line WS will not come back On-line, even when pressing the Go On-line button
    - 2.1.1 Ping 3 times
  - 2.2 EMC Client
  - 2.3 Resetting Database Passwords
- 3 See Also

Checklist to review for problems with CAL at a Workstation

In no particular order, review the following listed items.

- Make sure that the actual time and Time Zone of the WS are correct for the location and in regards to the server. Mismatches will cause no list of Properties or the WS itself to show up during CAL configuration.
- If the Simphony Application Server name shows up as just an IP address of the server, it will not connect. It must display the entire EGateway path: http://ServerName:8080/egateway/egateway.asmx You may need to attach a keyboard to the WS to enter this information. You may also need to swap the Server Name with the IP address if the Server name cannot be resolved.
- A good ping from a WS to the Server does ***not*** mean that it will successfully connect. You must be able to connect to the gateway through Internet Explorer at http://ServerName:8080/egateway/egateway.asmx in order to verify Service Host communication.
- Sometimes having a Browser open and connected to the Gateway and then running CAL will allow it to connect.
- If the WS is on a different Subnet, you will need to have a Default Gateway entered in the WS Network Interface Card (NIC) as well as the WS file, in addition to the correct Subnet Mask.
- If no list of properties and/or WS show up after selecting the server, verify that the web.config on the CAL Server has a subnet mask that matches the actual subnet mask that is on the NIC being used for CAL.

- From the EMC ensure that the CAL Package for the Simphony Ops Client is enabled for all WS types. If it still won't work, change this to the specific WS. Set the NIC information at the WS to match what is programmed in the EMC. Once correctly configured, CAL should start to download automatically onto the WS's.

- You can configure CAL, but nothing downloads, even when you change the setup.dat version. This can be caused when there are multiple packages that have the same name, or the same beginning of a name. **Example:**

  SimphonyClient
  SimphonyClientOld
  CAL will keep looking at the **SimphonyClientOld** package after renaming it (and even after rebooting) until it is moved out of the directory. ***No*** old folders should be in the packages directory, and each package name should be completely unique.

- If a previous CF/POSClient folder exists on the WS, CAL will not ***see*** any need to update, so nothing will be transferred. If there are no off-line transactions, this folder can be deleted and the client will install again with the correct version. This is useful on a test system when downgrading the version of the WS. The CAL client on the WS must first be stopped to delete the pre-existing CF/POSClient folder.

- If using a WS4 make sure that the Windows CE platform is up to version 4.2.

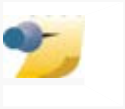
- Simphony CAL operates through a handler in the Egateway service as oppoesed to the Windows Micros CAL Service (Classic CAL). IIS must be running and the gateway accessible in order for CAL to function in Simphony.

- Try a different WS type. If the problem is with a WS4 not downloading, try a WS5 CAL package (which is usually very similar). If successful, copy the good files to the correct folder.

- WS's with no Default Revenue Center (RVC) assigned from within the EMC ***will*** load CAL but will ***not*** start Ops.

- Check the Playback Control module in the EMC and verify that transactions can play back and the WS's are not forced off-line at both the Enterprise and Property levels.

- If a package won't go down, even when configured to a specific platform type and service host, check the setup.dat version for this package. The setup.dat version is in the format of an IP v4 address and any value over 254 will not be recognized as a valid version.



Note: In a development or test environment (***not a live site***), make sure that the correct **SData1** database has been restored, and that it has the correct password located in the <DriveLetter>:\Micros\Simphony\EGatewayService\dbsettings.xml file. Use the Crypt utility to verify the User ID and Password and change them if necessary.

Troubleshooting Steps

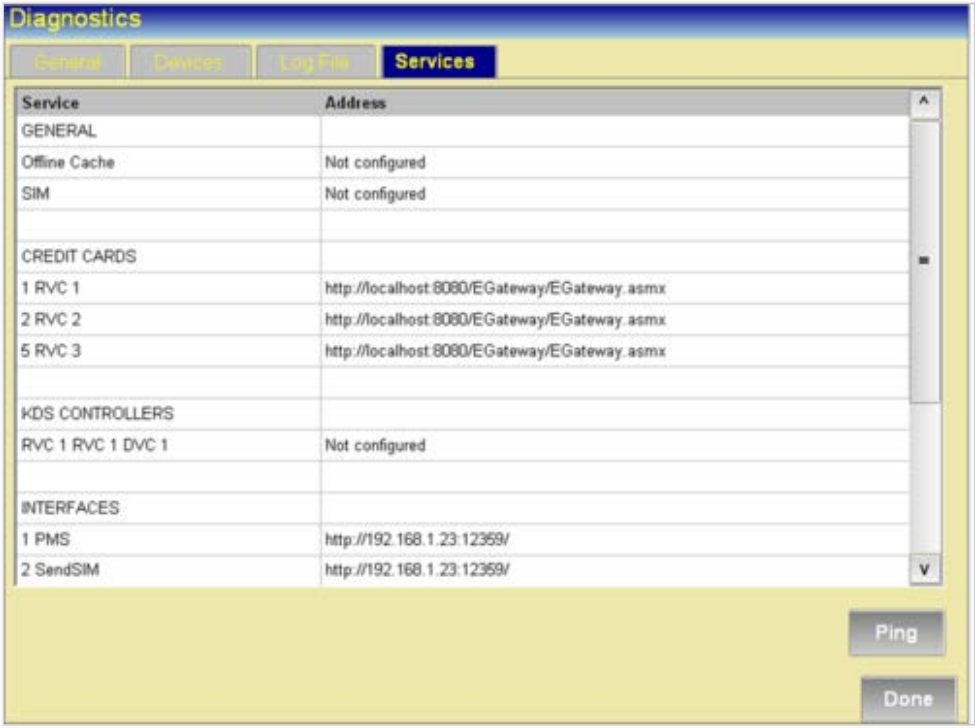
Off-line WS will not come back On-line, even when pressing the Go On-line button

Ping 3 times

Go to the **P**roperty **M**anagement **C**onsole or PMC (note that the button may say ***Reports*** or ***Procedures***). This opens up the yellow background screen.

- Go to **Diagnostics**
- Go to **Services**
- Click on the **Service Host for Check & Posting** and it will highlight
- Click on **Ping** in bottom right corner.

Once the WS responds that the database is up, the WS can be brought online.



PMC -> Diagnostics -> Services -> Ping tab

EMC Client

You should be able to download the EMC Client onto a remote PC by navigating to:
http://ServerName:8080/egateway/download/EMCClient/EMCSetup.exe

At the prompt, enter the Servername and the port number.

If this does not yield a functional EMC Client, copy all the files from the EMCClient folder on the Simphony Server to the remote client and allow overwriting for any that are already present.

Resetting Database Passwords

Usually within a test environment, WS's will load CAL, but may fail on the Db Download upon starting up if the database's have been imported and the passwords on the database's are not set to match those entered in the **<Drive letter>:\Micros\Simphony\EGatewayService\dbsettings.xml** file. Use the Crypt utility to verify that they are correct, and run the following MS SQL script to set the database's with the desired Users and Passwords (usually microsdb for both):

exec sp_change_users_login 'UPDATE_ONE', 'microsdb', 'microsdb'

- The example shown above assumes you are using a **MCRSPOS** database with the **microsdb** User set to **microsdb** as the password. This User and password are seen on many lab systems where databases have been moved as opposed to a live system that had the installation program run.

See Also

- CAL Package
- New CAL 2.x
- Simphony Log Matrix

Simphony Licensing

Simphony requires a software license for legal operations. MICROS generates license codes specific to the hardware signature of the following machine(s):

- The system.
- The workstations in the system.
- The KDS displays in the system.

You do not need license codes when installing Simphony version 2.7 MR3 and later or after upgrading to version 2.7 MR3 and later.

This article discusses **legal information or other details** that may not be intended for all readers.

This article discusses a topic related to **installation and initial configuration** of the system.

This feature or functionality was deprecated in Simphony 2.7 Maintenance Release 3.

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- 2 Obtaining a license code set
- 3 Configuring Simphony licensing
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- 4 Understanding the grace period
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    - 4.2.3 Enabling and configuring the email alerts
- 5 Performing licensing maintenance and troubleshooting
  - 5.1 Understanding the workstation and KDS display license limit
  - 5.2 Understanding incorrect code entry
- 6 See also

Understanding software codes

Simphony licensing consists of the following license code sets:

- System code: This code enables the product components to function. The system code contains eight alpha characters.
- Workstation client code: This code determines the number of workstations that can be configured in the system. The workstation client code contains 48 alpha characters. Each OPS client in Simphony is considered one licensed workstation.
- KDS client code: This code determines the number of KDS displays that can be configured in the system. The KDS client code contains 48 alpha characters. You can leave the field blank if you do not use KDS units in your system.

The software codes are specific to the application server(s) and are not interchangeable between systems or servers. If your site purchases additional workstations or KDS clients, MICROS generates a new set of license codes to replace the existing codes.

You must configure an application server or any machine with an EGateway to function as a licensed application server (LAS). The LAS periodically checks the validity of the license codes. If the LAS experiences hardware failure, the system enters a 30-day grace period. You can configure a secondary LAS to update the LAS entry in the EMC (See the Entering authorization codes section) without obtaining new code sets when the primary LAS experiences hardware failure.

Obtaining a license code set

When your site orders a new Simphony system or increases the number of workstations or KDS displays:

1. Contact your sales representative.
2. Run the provided application on the LAS to generate the SystemCode-*ServerName*.xml file. This file contains a unique signature file for the system.
3. If your system includes a secondary LAS, run the application to generate a SystemCode-*ServerName*.xml file for the secondary LAS.
4. Enter the system code in the XML file(s) into a form on the MICROS website or send the file(s) to your sales representative.

Configuring Simphony licensing

Configuring employee view and edit privileges

1. In the EMC, select Enterprise, select Setup, and then select **Enterprise Parameters**.
2. Select or deselect **[Enterprise Parameters Licensing]**. This employee role privilege controls a user's ability to configure licensing. All fields are dim when a user can view but not edit fields. The Licensing tab does not appear in the Enterprise Parameters module when a user cannot edit or view the fields.

Entering authorization codes

Enter the licensing values in the Authorization Code section.

Field	Description
Licensed Application Server Name	This field determines the location of the PC that serves as the LAS. This field accepts a host name only; IP addresses are not valid.
System Code	This field contains the 8-character code that validates the system's licenses. When the code is invalid, all modules in the system are inoperative.

Demo Mode	Select this option to have the system operate in demo mode. (See the System status indicators section.) You cannot select this option if you entered license codes in the form; this prevents a user from accidentally entering demo mode on a licensed system.
Workstation Client Code*	These fields contain the six 8-character codes that validate the workstation licenses for the system.
KDS Client Code*	These fields contain the six 8-character codes that validate the KDS display licenses (if in use) for the system. If your site does not use KDS units, this entry remains blank and the KDS status field does not appear.

* The license codes that MICROS provides to the site contain all three code sets. For convenience, copy the workstation and KDS codes from the file and then paste them into EMC using the **Paste** button. This button populates the six code boxes.

Verifying license status

The License Status section and the EMC status bar show the current license status for Simphony.

The following table describes the possible license statuses:

State	Condition	Required Actions
Valid	All system modules are functional and a site can use all licensed clients.	None.
Grace	All system modules are functional and a site can use all licensed clients. Messages appear on workstations and in EMC to alert users that the system is operating within the 30-day grace period. Workstations show grace period warning messages with increasing frequency as the end of grace period approaches.	A system administrator should contact the MICROS Support Center. This is an abnormal condition and should be corrected.
Invalid	All system modules are inoperative.	A system administrator should enter valid codes for the system.
Demo	Almost all system modules function normally. However, credit card batching and settling is disabled, and Start of Day does not increment.	A system administrator should enter the proper codes for the system. Typically, demo mode is only used before the system is in use.

Workstation and KDS license details

The following indicators provide additional details about workstation and KDS statuses:

- Number of workstations or KDS displays in the system/the total number of licenses available
- Click **Show Workstations** and **Show KDS Displays** to show a dialog box that lists all configured units with their respective license status.

Invalid workstations cannot perform check operations and cannot play back saved transactions when operating in Offline Mode. Unlicensed workstations show the following error message if a user attempts to perform an operation: License Status Unauthorized. Cannot continue.

Invalid KDS displays do not accept orders and cause orders to reroute to the backup display. Simphony does not provide end user notification if a KDS client is in an invalid state.

Understanding the grace period

Workstation notifications in grace period

You can select the workstation option **[26 - Do Not Display License Warning in Early Grace Period]** to prevent the workstation from showing the grace mode message for the first 25 days of the 30-day grace period. This option does not control behavior for the last five days of the grace period.

Setting grace period email alerts

Configuring the third party email server

1. After configuring the email server, open the micros\Simphony\EGatewayService\web.config file in a text editor.
2. Find the lines:

```
"<add key="AutosequenceMailFrom" value="AutosequenceServer@micros.com" />
"<add key="AutosequenceSmtpClient" value="localhost" />
```

3. Change the values:
   - Replace AutosequenceServer@micros.com with your system email address (for example, YourFromAddress@YourCompany.com).
   - Replace localhost with the SMTP server name that your site uses to send emails. If the SMTP server is the same as the application server, do not change localhost.

The web.config email settings also affect PC Autosequence emails.

Configuring email messages

To configure the subject and body of the email messages:

1. Open micros\Simphony\EGateway\EgatewayText.xml in a text editor.

2. Find the lines:

```
<?xml version="1.0" encoding="utf-8"?>
<EGatewayText>
   <LicenseGraceEmailSubject>Simphony License in Grace Period</LicenseGraceEmailSubject>
   <LicenseGraceEmailBody>The Simphony license is in grace period and will expire at {0}</LicenseGraceEmailBody>
</EGatewayText>
```

3. Customize the subject by replacing the text between the <LicenseGraceEmailSubject> tags.
4. Customize the message body by replacing the text between the <LicenseGraceEmailBody> tags. You must include {0} in the text. Simphony replaces {0} with the grace period expiration date when sending the message.

Enabling and configuring the email alerts

If you installed an email server on the LAS, you can configure the email alerts feature to enable automatic email alerts. Simphony sends email alerts from the email server to users when the grace period becomes active.

1. In the EMC, select Enterprise, select Setup, and then select **Enterprise Parameters**.
2. Enter information in the following Email Alert Settings fields:

Field	Description
Email Interval (in hours)	Set the interval for sending email alerts. The valid range is 1-72 hours with a default of 6 hours. During the last five days of the grace period, the system ignores this interval and sends email alerts to users at least once per day.
Email Addresses	Set at least one email to which the system sends notifications. Separate addresses using the semicolon (;) character when entering multiple addresses.

3. You can use the **Test** button to send a test message to all entered email addresses.

Performing licensing maintenance and troubleshooting

Understanding the workstation and KDS display license limit

The system determines workstation and KDS validity based on the the lowest record IDs. For example, if a site has a license for 20 workstations and the database contains more than 30 workstation records, the 20 workstations with the lowest IDs are active. You can view the workstation ID in the Workstations module and in the Workstation Client License Detail dialog box.

If you attempt to add a new workstation or KDS display and the new record would exceed the workstation/KDS license limit, EMC stops the operation and shows the error message: The new record cannot be created because the license limit has been reached.

If you attempt to perform distribution from the Workstations or the KDS Display module and the distribute operation exceeds the license limit, the EMC stops the operation and shows the error message: There are insufficient licenses to create the requested workstations or KDS clients.

The EMC shows this message if property distribution causes workstations and/or KDS displays to exceed the limits.

Understanding incorrect code entry

If you incorrectly enter new license codes on a previously-licensed system, the system enters the 30-day grace period. For example, when a site adds new hardware, the system and all existing clients continue working during the 30-day grace period, but the new clients do not work until you enter valid license codes.

See also

- Enterprise Parameters
- Legalities and other non-documentation

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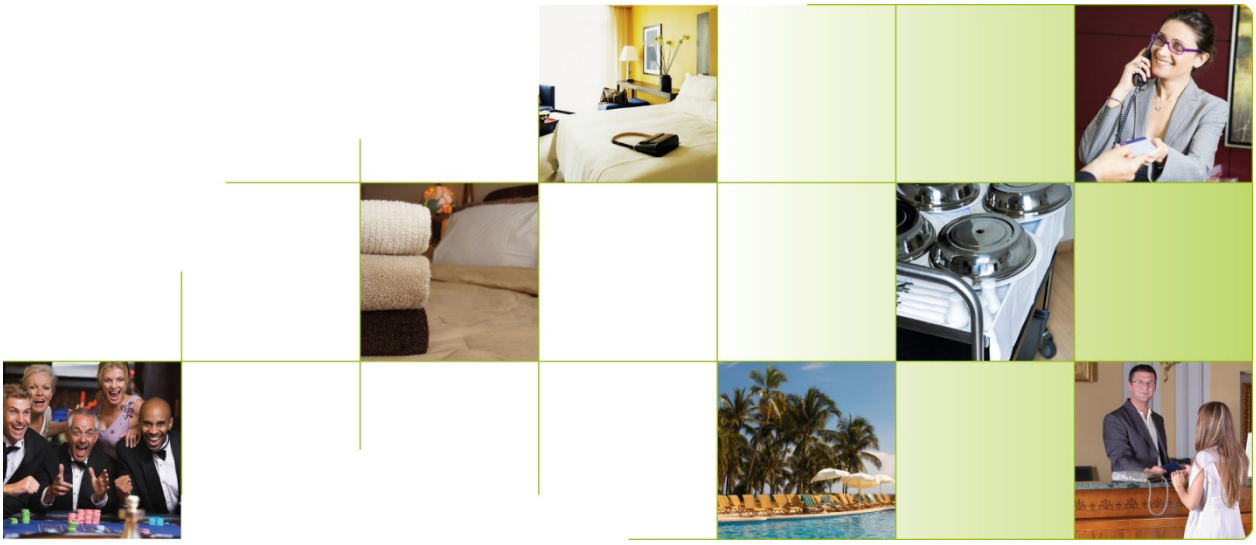

Simphony Reservations Configuration Guide

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Document Author: Simphony Product Management Documentation

MICROS Systems, Inc.
7031 Columbia Gateway Drive
Columbia, MD 21046
(443) 285-8000 / Fax: (443)-285-6505

About This Document

This guide provides instructions to configure the features that have been introduced with the new Simphony Reservations module in Simphony v2.6.

This document contains configuration information for features available with the Version 2.6 release of the MICROS Simphony software.

Who Should Be Reading This Document

This document is intended for the following audiences:

- MICROS Installers/Programmers
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes the reader has the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of basic network concepts

Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version
Rev A	January	2014	2.6.0

Document Organization

For clarity, information is divided into self-contained chapters, reflecting the configuration of the following Reservations functions:

- Prerequisite Configuration
- Reservations Feature Configuration
- TMS Parameters
- Reservation Periods
- Page Design

For more information on the usage of these features, refer to the *Simphony Reservations User Guide*, available from the MICROS website.

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Prerequisite Configuration

Simphony Table Management

To support the taking of reservations, the Simphony Table Management System (TMS) will be required. Please refer to the *Simphony Table Management System Configuration Guide* for instructions on how to configure TMS.

Simphony Wait List

To support the acceptance and seating of reservations, the Simphony Wait List will be required. Please refer to the *Simphony Wait List Configuration Guide* for instructions on how to configure the Wait List.

Reservations Feature Configuration

Loyalty

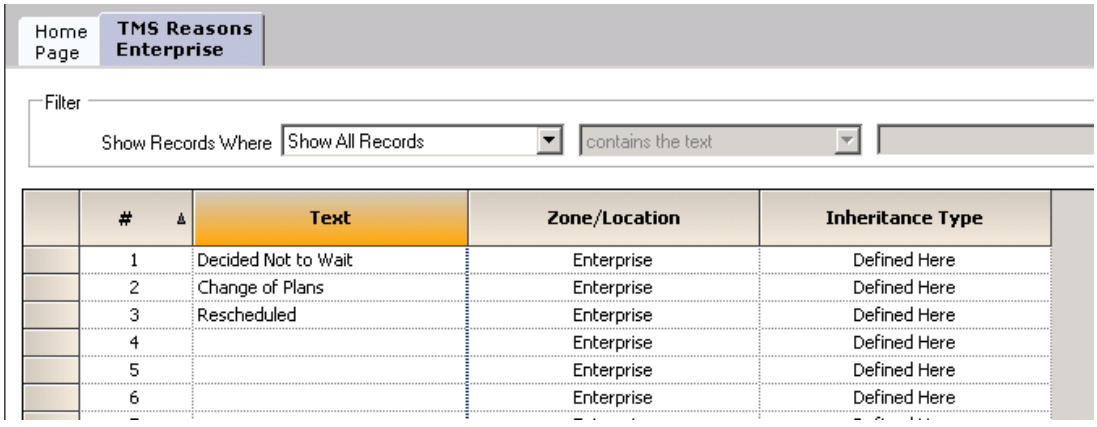
Simphony Reservations supports integration with Loyalty applications such as Simphony Loyalty (iCare) and third-party loyalty applications based upon the Loadable Loyalty Modules. This allows for the lookup and association of loyalty accounts from the reservation request. If loyalty integration is desired, configure the Loadable Loyalty Module in accordance with the instructions in the *Loyalty Module Configuration Guide*. For instructions on the use of the Loadable Loyalty Module with a reservation, please refer to the appropriate section in the *Simphony Table Management System Configuration Guide*.

Reservations/ Wait List Reason

Reservation / Wait List Reasons are utilized to define the reason a table request is being cancelled or abandoned. Navigate to **Descriptors tab | TMS Reasons**.

Reasons

Simphony allows for up to 32 reasons to be defined. Enter the reason in the text field. When prompted for a reason a request is being cancelled or abandoned, the reasons defined in this list will be presented if the system is configured to require a reason code.



#	Text	Zone/Location	Inheritance Type
1	Decided Not to Wait	Enterprise	Defined Here
2	Change of Plans	Enterprise	Defined Here
3	Rescheduled	Enterprise	Defined Here
4		Enterprise	Defined Here
5		Enterprise	Defined Here
6		Enterprise	Defined Here

Table Attributes

Simphony Reservations supports the entry of Table Attributes in the reservation request as a way of entering special table seating requests. This allows for the Wait List to utilize the attribute in the assignment of a table when seating. For instructions on the configuration of Table Attributes for use with a reservation, please refer to the appropriate section in the *Simphony Table Management System Configuration Guide*.

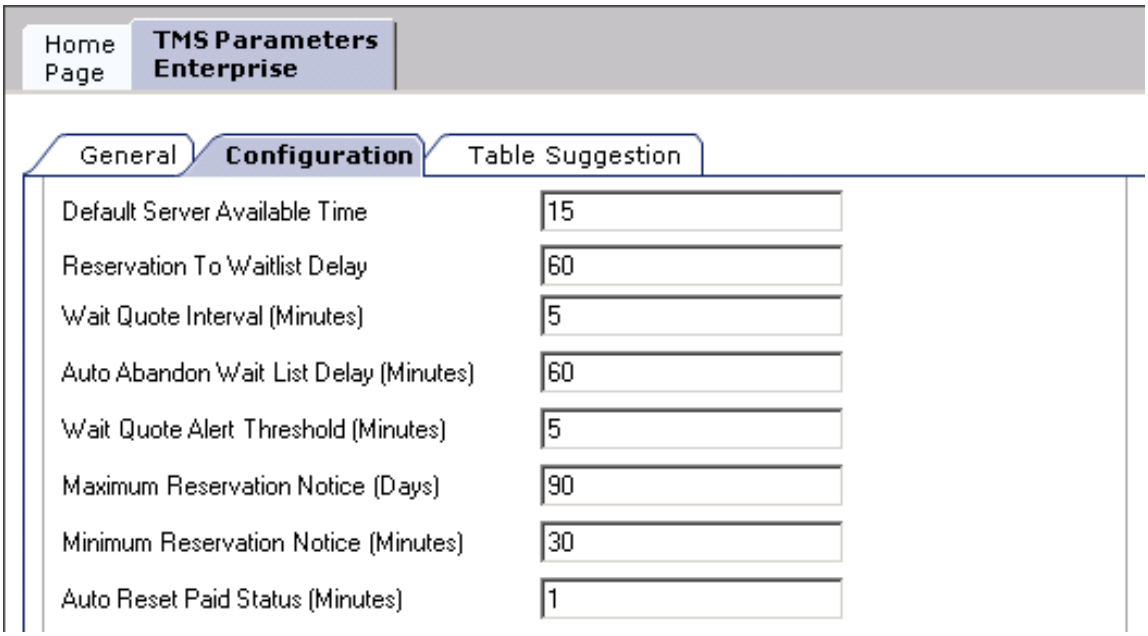
Tables

Simphony Reservations supports the entry of a Table Number/Name in the reservation request as a way of entering special table seating requests. This allows for the Wait List to utilize the Table Number/Name in the assignment of a table when seating. For instructions on the configuration of tables, please refer to the appropriate section in the *Simphony Table Management System Configuration Guide*.

TMS Parameters

Operating Parameters

Within the TMS Parameters configuration are several operating parameters utilized by TMS, Reservations, and Wait List. We will review those settings associated with Reservations. Navigate to **Setup tab | TMS Parameters**.



Reservation to Waitlist Delay (Minutes)

This parameter defines how far before the scheduled seating time a reservation will be visible on the Wait List. Reservation records that are visible on the Wait List will have an impact on the quote times and table suggestions.

Maximum Reservation Notice (Days)

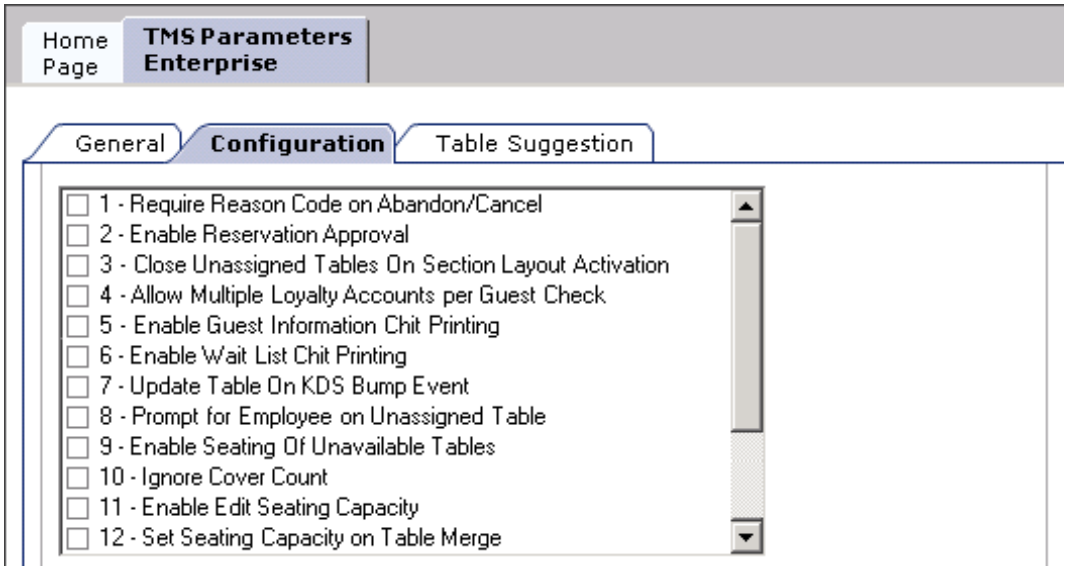
This parameter defines how far in advance that a reservation can be made in the future. The value entered includes the current business day.

Minimum Reservation Notice (Minutes)

This parameter defines when reservations can no longer be made for the same business day.

Option Bits

The option bits that are part of the TMS Parameters are used to enable/disable certain functions or behaviors with TMS, Reservations, and Wait List. We will review those settings associated with Reservations. Navigate to **Setup tab | TMS Parameters**.



Require Reason Code on Abandon/Cancel

This option bit determines whether the user will be prompted to provide a reason for the cancellation of the reservation request when manually performed by the user.

Enable Reservation Approval

This option bit determines whether the user will be required to obtain approval when creating a new reservation outside of a date/time that is currently available in the inventory configured in TMS.

Enable Create and Edit Buttons

This option bit determines whether the user will be shown buttons at the bottom of the Reservation List that will allow them to create new reservations or edit existing reservations. When enabled, the ability to double-touch on the screen to create or edit is still permitted.

Reservation Periods

Period Definition / Effectivity

Reservation Periods provide a way to define availability for reservation requests. The creation of a Reservation Period is optional. The creation of new reservations could be made with no date, time, or cover count restrictions. This would prompt and require the appropriate privileges to confirm the new reservations. The values defined in the Reservation Periods are set to control reservation inventory and will not restrict user ability to accept walk-in table requests.

For instructions on the configuration of Reservation Periods, please refer to the appropriate section in the *Simphony Table Management System Configuration Guide*.

Page Design

Page Template

The use of Reservations features is based upon the placement of the Reservations List onto a page. This can be done using any of the existing templates provided in Simphony. For those properties that will be utilizing future reservations or multiple layouts, it is strongly recommended that a Tabbed Template be utilized to allow for a smoother means to navigate between lists and layouts. To add a Reservation screen, navigate to **Configuration tab | Page Design | Edit tab | Other button | Table Management | Reservation Area**.

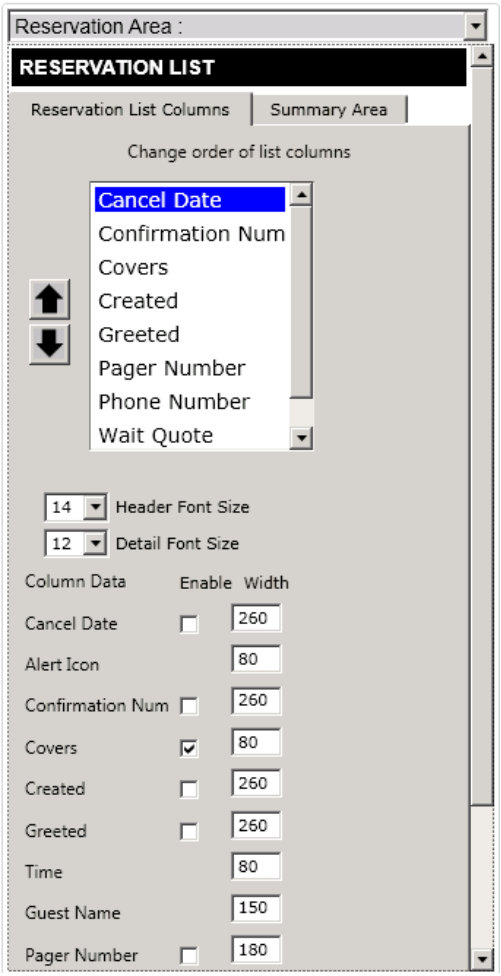
Reservation Screen

The Reservation screen can be recalled and hidden from the Host Command Area or placed on its own page. This screen contains the controls for creating future table requests (Reservations). While the Reservation screen can be recalled from the Host Command Area, configuration of a Reservation screen on its own page is strongly recommended.

Once the Reservation screen has been placed on the page, selection of the screen will display the Reservation List Configuration settings. The settings are broken up into two tabs: Columns and Summary.

Columns

The columns tab provides all of the settings required to configure those columns and formats that will be utilized by the Reservation List when it is viewed from the page in OpsClient. Once the content for the columns has been enabled by checking the Enable option next to the desired Column Data field, the order in which they are displayed from left to right on the Reservation List can be configured.



- Font Size
  The size of the font utilized to display the column headers and column data can be defined using the drop-down lists provided.

- Cancel Date
  If the reservation has been cancelled or was a no-show, this will contain the date and time the record was updated to the new status. The width of the cancel date column on the Reservation List can be configured. The order in which the cancel date is shown on the Reservation List can be changed by selecting Cancel Date from the sorting list and moving the field up or down.

- Alert Icon
  The Alert Icon is always enabled and will be the first column shown in the Reservation List. This column will contain any icons that are utilized to indicate status or properties of the reservation record. This includes an icon representing the Request Method, VIP and Seating Preferences. The width of the Alert Icon column on the Reservation List can be configured.

- Confirmation Number
  Once the reservation record has been created and is shown on the Reservation List, a system issued confirmation number can be shown. The width of the confirmation number column on the Reservation List can be configured. The order in which the confirmation number is shown on the Reservation List can be changed by selecting Confirmation Number from the sorting list and moving the field up or down.

- Covers
  This column will display the number of covers that are currently defined for the reservation request. The width of the covers column on the Reservation List can be configured. The order in which the covers are shown on the Reservation List can be changed by selecting Covers from the sorting list and moving the field up or down.

- Created
  This column will display the date and time that the reservation request was created. The width of the Created column on the Reservation List can be configured. The order in which the Created column is shown on the Reservation List can be changed by selecting Created from the sorting list and moving the field up or down.

- Greeted
  Once the reservation record has been greeted by a member of the host staff, a Greeted time can be shown. The width of the Greeted column on the Reservation List can be configured. The order in which the Greeted column is shown on the Reservation List can be changed by selecting Greeted from the sorting list and moving the field up or down.

- Time
  The Time column is always enabled and will be the second column shown in the Reservation List. This column will contain the time that the reservation record is scheduled to be seated. The width of the Time column on the Reservation List can be configured.

    - Guest Name
      This column will display the Guest Name that was entered for the reservation request. The width of the Guest Name column on the Reservation List can be configured. The Guest Name column is always enabled and will be the third column shown in the Reservation List.

    - Pager Number
      This column is not applicable to reservation requests and is being removed. Please do not configure your Reservation List to contain this column.

    - Phone Number
      This column will display the phone number that was entered for the reservation request. The width of the Phone Number column on the Reservation List can be configured. The order in which the Phone Number column is shown on the Reservation List can be changed by selecting Phone Number from the sorting list and moving the field up or down.

    - Request Method
      Enabling this column data will display an icon in the Icon Alerts column that represents the source of the reservation request (Phone-In, Internet).

- VIP
  Enabling this column data will display an icon in the Icon Alerts column that shows that the VIP flag in the reservation request was selected.

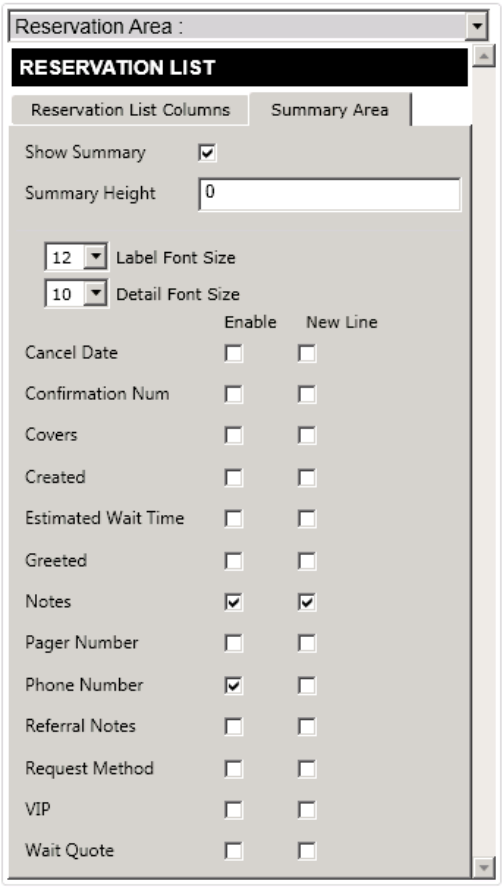
- Wait Quote
  This column is not applicable to reservations and is being removed. Please do not configure your Reservation List to contain this column.

Summary

The summary tab provides the ability to show and configure those reservation details that will be shown when the table request is highlighted on the Reservation List.

If a summary is not desired, uncheck the Show Summary option. If Show Summary is enabled, the content for the summary can be enabled by checking the Enable option next to the desired Column Data field. An option to have this data shown on a new line within the Summary area is also available.

- Summary Height
  The ability to set a static height for the Summary area is available. Enter a value to set the static value. A value of 0 will allow the height of the Summary area to be shown dynamically depending upon the amount of content and details that are associated with the reservation record that has been selected on the reservation list.



- Font Size
  The size of the font utilized to display the summary label and details can be defined using the drop-down lists provided.

- Cancel Date
  This summary option will contain the date and time the record was cancelled or set to a no-show.

- Confirmation Number
  This summary option will contain the confirmation number associated with the reservation record.

- Covers
  This summary option will contain the number of covers associated with the reservation record.

- Created
  This summary option will contain the date and time the record was created.

- Greeted
  This summary option will contain the time the record was greeted by a hosting staff member.

- Notes
  This summary option will contain any text that has been included in the Notes field of the reservation record. This field can hold up to 255 characters of text and will automatically wrap in the summary area when required.

- Pager Number
  This summary option is not applicable to reservation requests and is being removed. Please do not configure your Reservation List to contain this summary data.

- Phone Number
  This summary option will contain the phone number that was associated with the reservation record.

- Referral Notes
  This summary option will contain any text that has been included in the referral notes field of the reservation record. This field can hold up to 255 characters of text and will automatically wrap in the summary area when required.

- Request Method
  This summary option will contain a text description (Phone-In, Internet) of the request method for the reservation record.

- VIP
  This summary option will display “VIP” in the summary area if the reservation record has been flagged as being a VIP.

- Wait Quote
  This summary option is not applicable to reservation requests and is being removed. Please do not configure your Reservation List to contain this summary data.

Configuration Levels

The table below shows those levels within EMC that will allow for configuration of functionality related to Reservations operations.

Configuration Name	Enterprise	Property	RVC	Zone
TMS Parameters	*	*	*	*
TMS Reasons	*	*	*	*
Reservation Periods			*	
TMS Table Attributes	*	*	*	
Loyalty Module	*	*	*	*
Page Design	*	*	*	*

Reservations Privileges

The table below shows those privileges associated with Reservations functionality and the roles recommended having the privilege enabled.

Tab Location	Bit Number	Privilege Name	Description	Recommended Roles
Guest Management	32006	Greet Wait List Entry	Allows user to greet a Reservation request record if they have arrived earlier than the time in which the reservations are automatically moved to the Wait List..	Host Manager
Guest Management	32007	Mark as No Show	Allows user to mark a reservation request record as a no-show.	Host Manager
Guest Management	32010	Add Reservation Entry	Allows the user to create a new reservation request record.	Host Manager
Guest Management	32011	Edit Reservation Entry	Allows user to edit an existing Reservation List request record.	Host Manager
Guest Management	32012	Cancel Reservation Entry	Allows user to cancel a Reservation List request record.	Host Manager
Guest Management	32013	Approve Reservation Entry	Allows the user to approve a new or existing reservation request that is requesting a date or time outside an acceptable/allowable timeframe.	Host Manager

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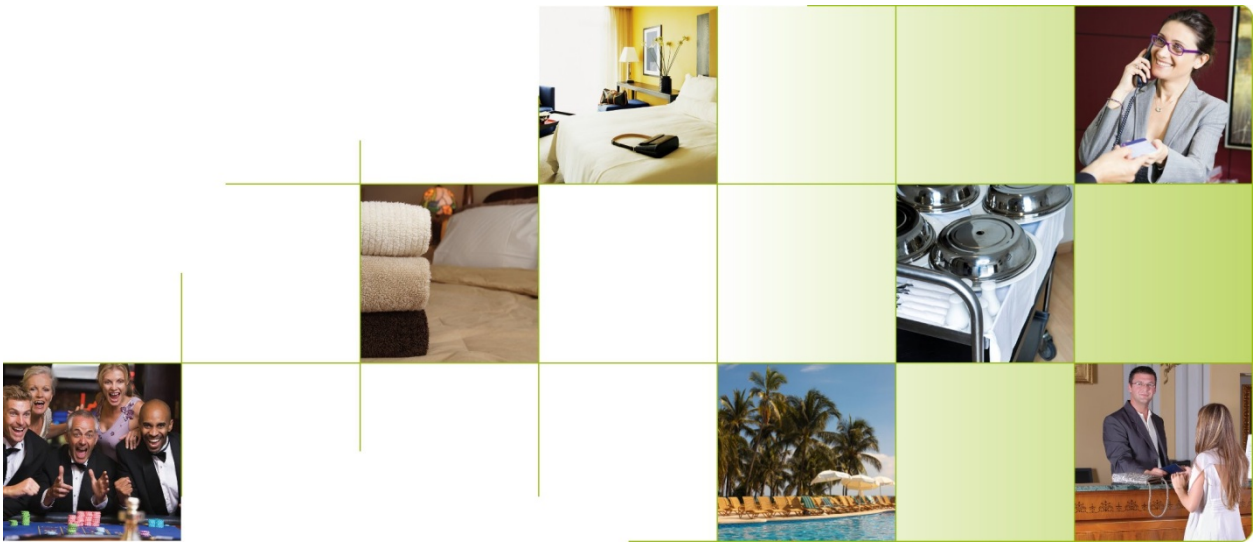

Simphony Table Management Configuration Guide

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Document Author: Simphony Product Management Documentation

MICROS Systems, Inc.
7031 Columbia Gateway Drive
Columbia, MD 21046
(443) 285-8000 / Fax: (443)-285-6505

About This Document

This guide provides instructions to configure the features that have been introduced with the new Simphony Table Management System (TMS) module in Simphony v2.6.

This document contains configuration information for features available with the Version 2.6 release of the MICROS Simphony software.

Who Should Be Reading This Document

This document is intended for the following audiences:

- MICROS Installers/Programmers
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes the reader has the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of basic network concepts

Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version
Rev A	February	2014	2.6.0
Rev B	March	2014	2.6.0

Document Organization

For clarity, information is divided into self-contained chapters, reflecting the configuration of the following Table Management functions:

- General Configuration
- Dining Tables
- TMS Parameters
- Alerts
- Section
- Reservation Periods
- Page Design

For more information on the usage of these features, refer to the *Simphony Table Management User Guide*, available from the MICROS website.

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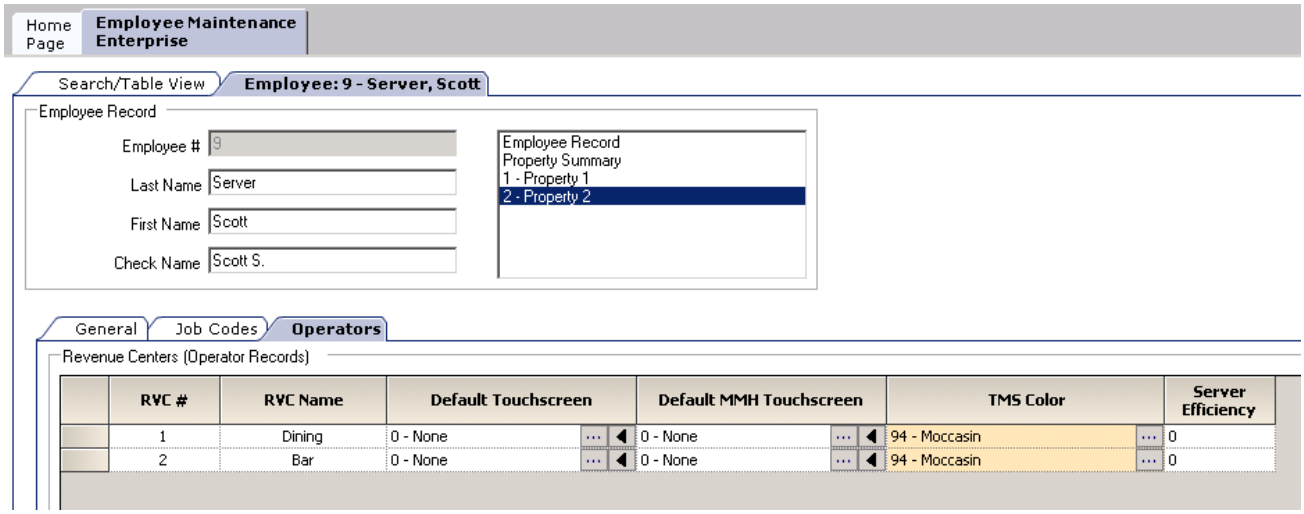
General Configuration

Employee

To support features of the Simphony TMS, three areas of the Employee Record can be configured. Navigate to **Setup tab | Employee Maintenance**. Recall the specific Employee Record and open the Operators tab.

Check Name

The Check Name represents the name that will be used to show the Server Name throughout TMS. This field, while optional in the employee maintenance configuration, is required when using TMS. Failure to populate a Check Name will present the hosting staff with a blank name on all displays and printouts.



TMS Color

The TMS Color is used to distinguish this Server from other Servers on the hosting page. While a different color can be defined for each revenue center within a property, it is suggested that a single color be used across the property for the employee. If no TMS Color is defined for the employee, white will be utilized any place where the application requires a TMS Color.

Server Efficiency

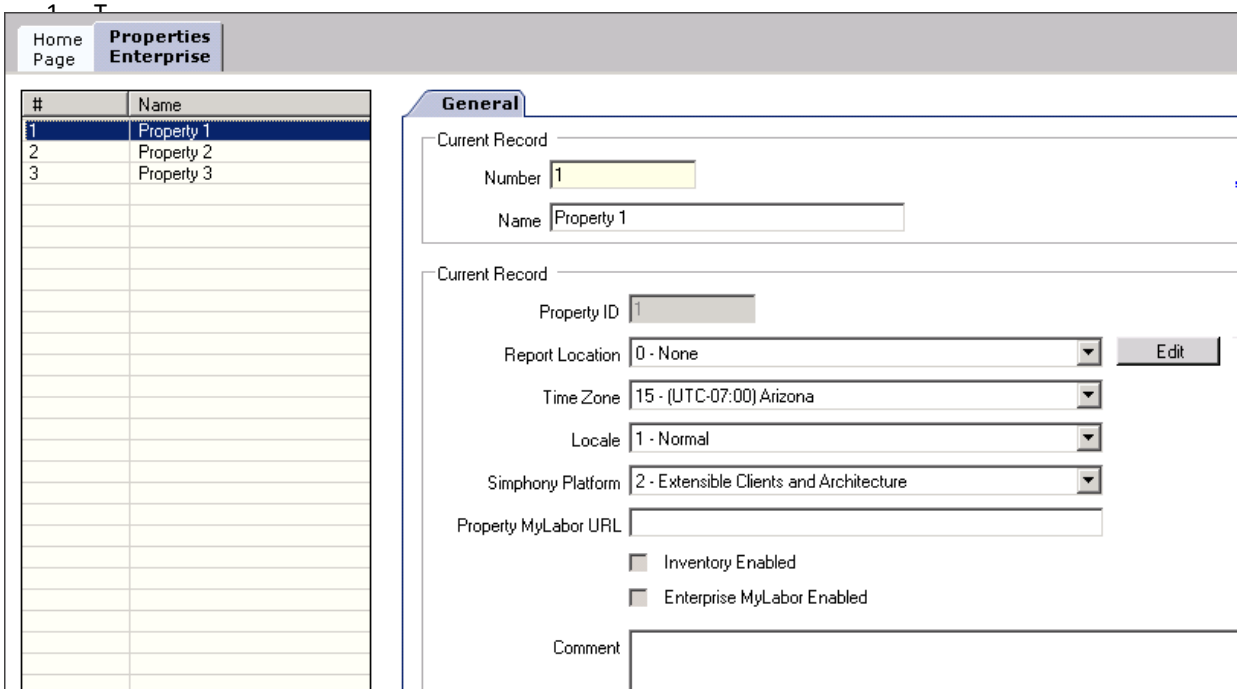
The Server Efficiency Rating is a value that is set by the Table Suggestion System in TMS to determine the next table that is recommended for seating. This rating is defined to be a value between 0 and 100, representing the number of covers that this server can efficiently handle at one time. A value of 0 will effectively ignore this server if the Table Suggestion System is configured to take Server Efficiency Rating into consideration.

Properties

TMS functionality is only supported for those properties defined under the supported Simphony Platform. Navigate to **Setup tab | Properties**. Recall the specific Property Record.

Simphony Platform

TMS requires the use of the "2-Extensible Clients and Architecture" platform.



Custom Content

TMS can utilize images that are loaded into the application to represent table seating configuration or statuses. These can be images that have been created by the customer or are provided with the application. Navigate to **Setup tab | Content**.

Table Images

Table images are optionally definable with TMS and show a graphical representation of what the table and seating look like. This may be a square or round table with any number of chairs. A small library of table images for use with Simphony Table Management has been defined and can be obtained from within the Simphony Discovery Wiki. After logging in to the Member Services portal and accessing the Wiki, in the Search field type Table Management General Configuration. This page contains a link in the Custom Content section to obtain the SIMPHONY_TMS_TABLE_IMAGES.ZIP.

All of the TMS Table images are constructed to be transparent .PNG files. Use of any custom files that do not support transparency can reduce the overall ease of usability in TMS.

Table Decorators

Table decorators are optionally definable with TMS and show a graphical representation of the current table status. This may be a Dirty, Closed, or Reserved indicator. A small library of table decorators for use with Simphony Table Management has been defined and can be obtained from within the Simphony Discovery Wiki. After logging in to the Member Services portal and accessing the Wiki, in the Search field type Table Management General Configuration. This page contains a link in the Custom Content section to obtain the SIMPHONY_TMS_TABLE_DECORATORS.ZIP.

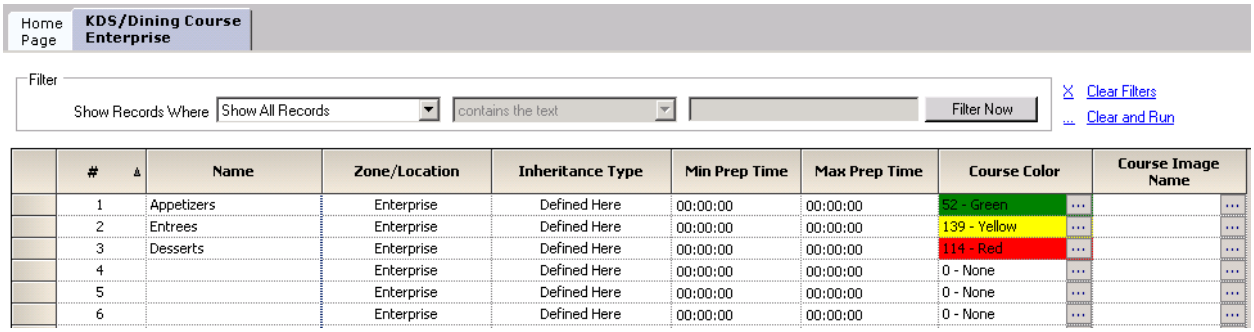
All of the TMS Table decorators are constructed to be transparent .PNG files. Use of any custom files that do not support transparency can reduce the overall ease of usability in TMS.

KDS / Dining Courses

TMS can utilize a color or image to indicate the current KDS / Dining Course that the table is currently being serviced under. Navigate to **Descriptors tab | KDS/Dining Course**.

Course Color

For any courses that are to have a color representation, select the build box in the Course Color column and select a color from the list provided. This color will be used as the Course Indicator on the table image in TMS.



#	Name	Zone/Location	Inheritance Type	Min Prep Time	Max Prep Time	Course Color	Course Image Name
1	Appetizers	Enterprise	Defined Here	00:00:00	00:00:00	52 - Green	
2	Entrees	Enterprise	Defined Here	00:00:00	00:00:00	139 - Yellow	
3	Desserts	Enterprise	Defined Here	00:00:00	00:00:00	114 - Red	
4		Enterprise	Defined Here	00:00:00	00:00:00	0 - None	
5		Enterprise	Defined Here	00:00:00	00:00:00	0 - None	
6		Enterprise	Defined Here	00:00:00	00:00:00	0 - None	

Course Image Name

This allows for a graphical image instead of a colored indicator to represent the course on the table in TMS. If a Course Image is defined, this image will replace the use of the "Occupied" image on the table. Select the Course Decorator image for the Course Name defined in the Content configuration.

> *To remove a Course Image that was previously defined, select **None** for the Course Image Name.*

Loyalty

TMS supports integration with Loyalty applications such as Simphony Loyalty (iCare) and third-party loyalty applications based upon the Loadable Loyalty Modules. Navigate to **Setup tab | Loyalty Module**.

Loyalty Integration

Integration with a loyalty application may allow for customer membership information to be obtained from the loyalty application and applied to the table request. This information, once associated to the table request, will follow the customer through the life of the guest check and allow for the execution of loyalty based transactions without the need to obtain the customer's membership information again.

If loyalty integration is desired, configure the Loadable Loyalty Module in accordance with the instructions in the *Loyalty Module Configuration Guide*.

Tender / Media

TMS will require a unique Tender/Media record to process seating and unseating tasks. Navigate to **Configuration tab | Tender/Media Module**.

TMS

Create a new Tender/Media record with a name of "TMS". Set the Key Type to "2 - Service Total" and save. No other configuration should be utilized on this TMS Tender/Media record.

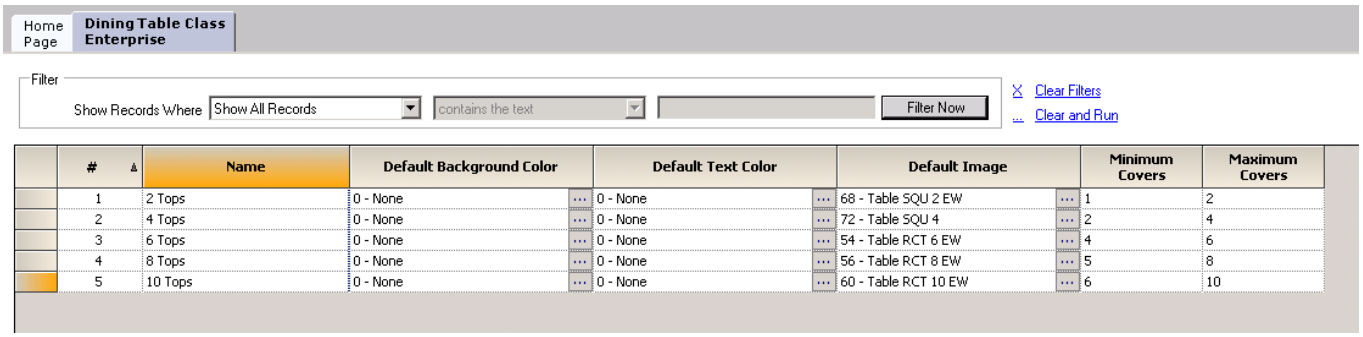
Dining Tables

Dining Table Classes

Dining Table Classes provide a means of grouping and configuring like tables together for association with the table management functionality. Navigate to **Setup tab | Dining Table Class**.

Name

The name of the dining table class is used to identify the class as you are configuring TMS.



#	Name	Default Background Color	Default Text Color	Default Image	Minimum Covers	Maximum Covers
1	2 Tops	0 - None	0 - None	68 - Table SQU 2 EW	1	2
2	4 Tops	0 - None	0 - None	72 - Table SQU 4	2	4
3	6 Tops	0 - None	0 - None	54 - Table RCT 6 EW	4	6
4	8 Tops	0 - None	0 - None	56 - Table RCT 8 EW	5	8
5	10 Tops	0 - None	0 - None	60 - Table RCT 10 EW	6	10

Default Background Color

This optional field provides a background color to represent the table. Any color chosen here should be different than the color used on any page background so as not to blend the two together. If a table image with transparency has been associated with this Dining Table Class, the background color will be shown with the image. Leaving this as "0 – None" will only show the table image and background color of the page.

Default Text Color

This optional field defines the color of text used to represent the table number or name on the page. Any color chosen here should be different than the color used on any table background colors or the table image. Leaving this field as "0 – None" will use the default Text Color of "8 – Black".

Default Image

This optional field defines the table image that will be used to represent the table on the page. Selection from the list will recall a list of Content that was previously configured.

Minimum Covers

Minimum Covers defines the lowest number of covers that this Dining Table Class will be configured to accommodate.

Maximum Covers

Maximum Covers defines the greatest number of covers that this Dining Table Class will be configured to accommodate.

> *Overlap of covers is allowed when configuring a Dining Table Class. This provides the ability to seat a certain cover count within one or more Dining Table Classes (e.g., 4 covers on a 4-top or 6-top).*

Option Bits

Enhanced Dining Table

This option bit should be enabled when using Enhanced Dining Tables within this Dining Table Class. Disable this option when using legacy tables (non-enhanced tables).

Table Attributes

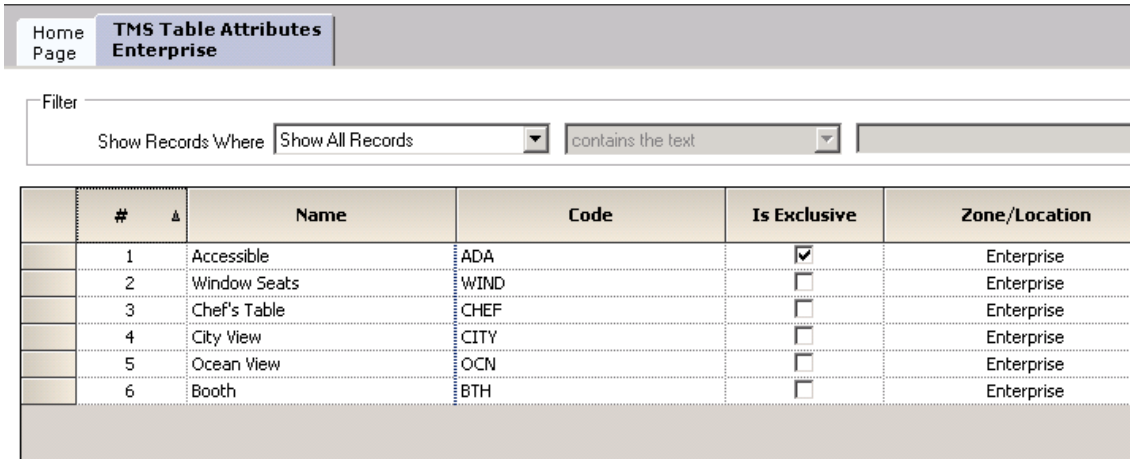
Table Attributes allow for characteristics of the table to be defined and used in the Table Suggestion process. These are represented as Table Preferences in the customers' table request. Navigate to **Setup tab | TMS Table Attributes**.

Name

This defines the name of the attribute that can be associated with a table.

Code

The attribute code is utilized to define an attribute as a guest preference in the request. The code is utilized in the request and in any printing to represent the guest's preference to this table attribute.



#	Name	Code	Is Exclusive	Zone/Location
1	Accessible	ADA	☑	Enterprise
2	Window Seats	WIND	☐	Enterprise
3	Chef's Table	CHEF	☐	Enterprise
4	City View	CITY	☐	Enterprise
5	Ocean View	OCN	☐	Enterprise
6	Booth	BTH	☐	Enterprise

Is Exclusive

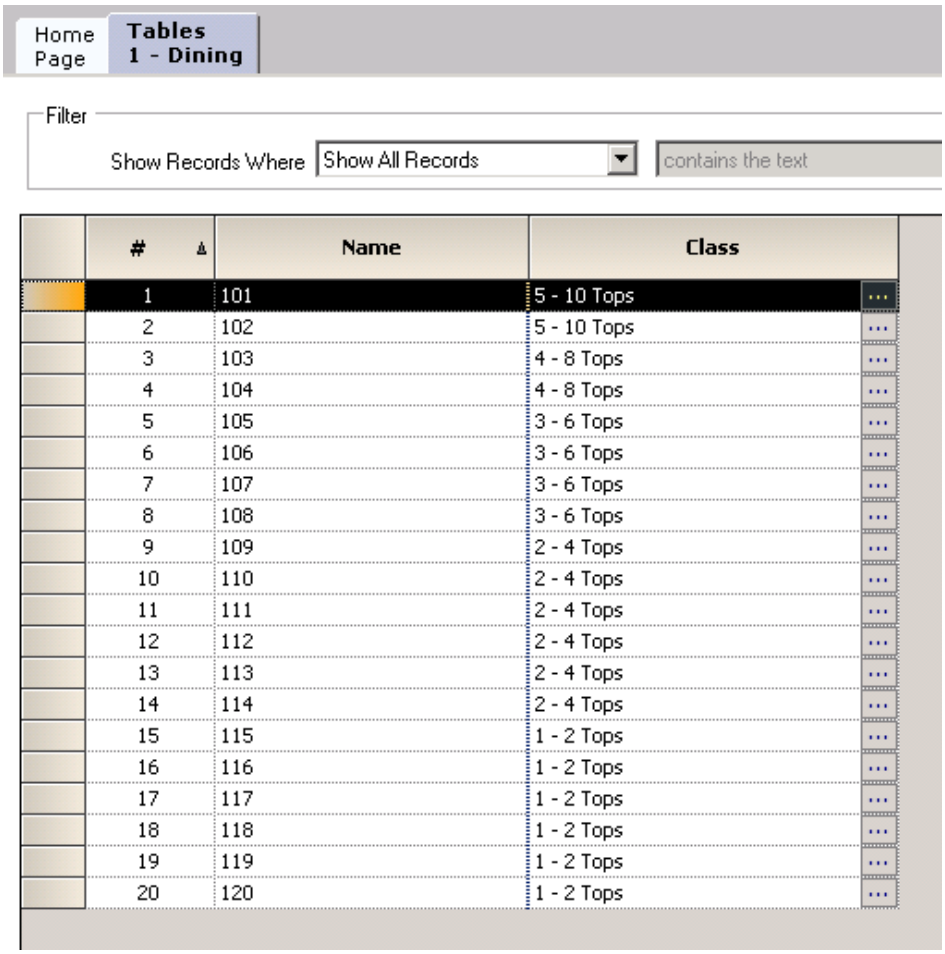
This optional checkbox determines whether this table attribute must be met before being included in any table seating suggestion.

Tables

Tables represent the physical location where a party will be seated with a Quick Seating or from the Simphony Wait List. Navigate to **Setup tab | Tables**.

Table Number

Table Number represents the internal number used to distinguish one table from another within the property. This number must be unique for all revenue centers within the defined property. The Table Number is the table reference when it comes time to define the table that is shown on the page.



#	Name	Class
1	101	5 - 10 Tops
2	102	5 - 10 Tops
3	103	4 - 8 Tops
4	104	4 - 8 Tops
5	105	3 - 6 Tops
6	106	3 - 6 Tops
7	107	3 - 6 Tops
8	108	3 - 6 Tops
9	109	2 - 4 Tops
10	110	2 - 4 Tops
11	111	2 - 4 Tops
12	112	2 - 4 Tops
13	113	2 - 4 Tops
14	114	2 - 4 Tops
15	115	1 - 2 Tops
16	116	1 - 2 Tops
17	117	1 - 2 Tops
18	118	1 - 2 Tops
19	119	1 - 2 Tops
20	120	1 - 2 Tops

Table Name

The Table Name represents the external facing name or number that will be used by users to differentiate this table from others in TMS. Table Names must be unique within their defined revenue center. Valid values in the name field are limited to:

- All Numeric
- All Alpha
- Alpha then Numeric

Dining Table Class

The Dining Table Class defines the type of table in TMS. All instances of this Table Number will utilize the color, image and cover configurations defined for the selected Dining Table Class.

> *Only create tables that are to be used for seating within a revenue center. Creation of non-seatable tables (bar tabs) will prevent the table suggestion system from properly distributing tables.*

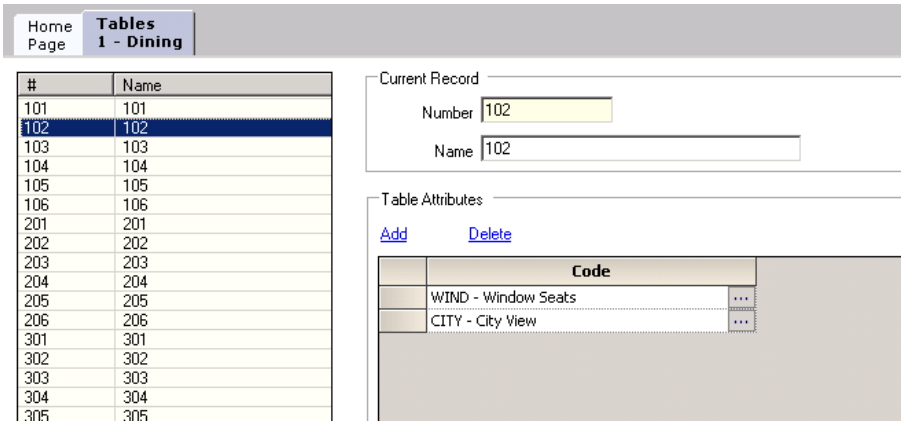
Deleting Tables

Do not delete tables unless they are no longer used in any reports.

> *It is recommended that tables which are no longer used be assigned to a Dining Table Class named to indicate this status. For example, create a Dining Table Class named "NOT IN USE" and assign any unused tables to this class. Tables assigned to the "NOT IN USE" class cannot be used for seating, but still remain in the Simphony TMS for reporting purposes.*

Table Attributes

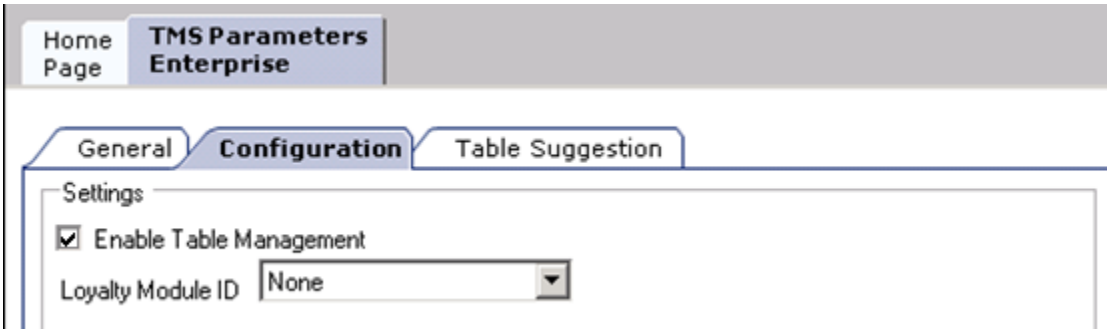
One or more Table Attributes may be associated to the Table. When defined, guest preferences that are entered on the requests will be matched up with tables that have attributes matching the preference. This will move those tables that have a window seating attribute further up into the suggestion process than one that is not when it is defined as a guest preference.



TMS Parameters

Settings

The TMS Parameters configuration contains the bulk of the operational settings for TMS behavior in the POS. Navigate to **Setup tab | TMS Parameters**.



Enable Table Management

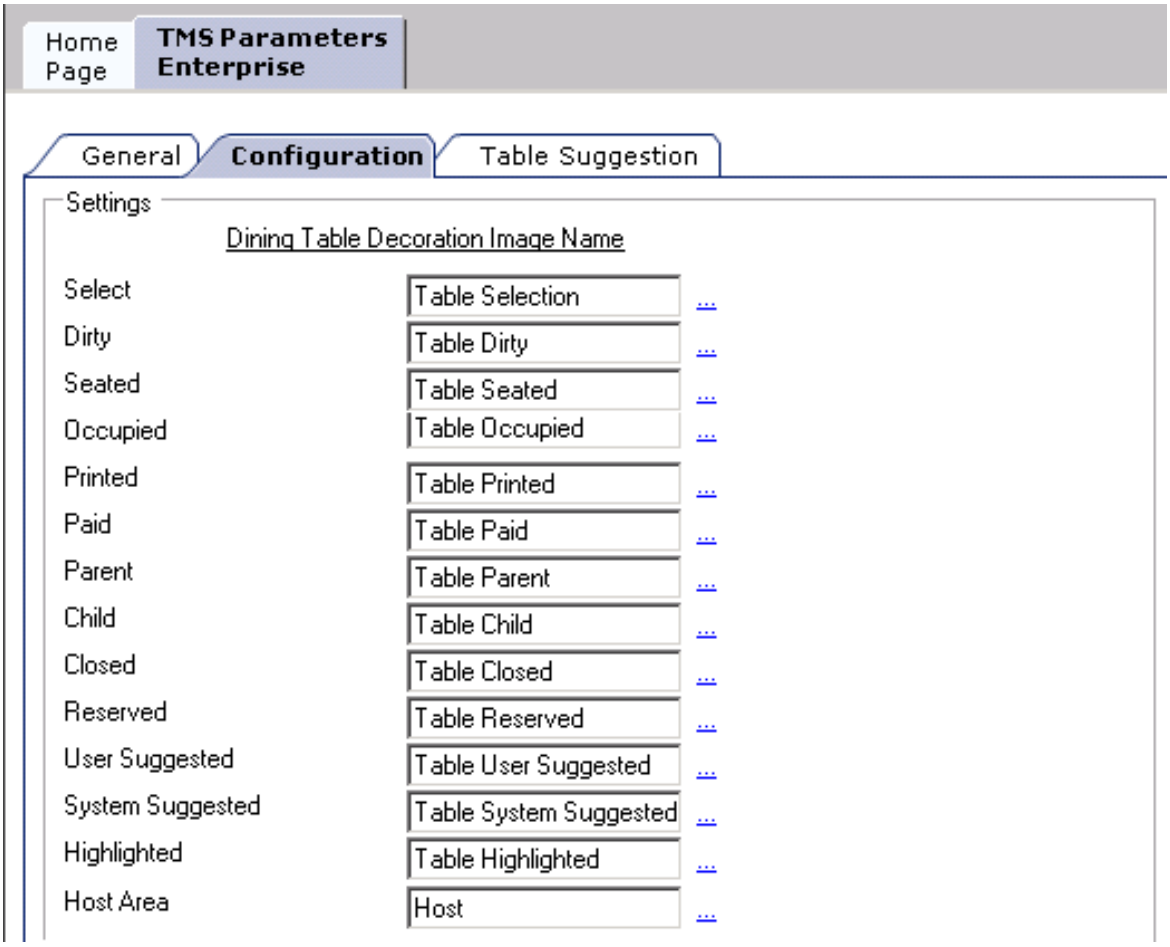
This option bit turns on Table Management capabilities in Simphony. This option should only be enabled for those properties or revenue centers that intend to use any of the TMS features. Enabling TMS will increase both required workstation resources and bandwidth for communications with the enterprise.

Loyalty Module

If a Loyalty application has been identified to use for the lookup and processing of transactions, select the Loyalty Module from the drop-down list. If Loyalty will not be utilized, set this field to “None”.

Table Decorators

Table decorators provide a graphical representation of a table or seating status on the table image. Navigate to **Setup tab | TMS Parameters | Configuration tab**.



Selecting the link at the end of each of the defined Dining Table images will open a list of the images configured under “Content”. Populating an image is optional but is strongly recommended for those statuses that will be utilized as part of daily TMS operations.

Select the image that will represent any of the following statuses:

Select

This decorator will be utilized when selecting one or more tables. Table selection is only available on a page where the Host Mode has been enabled. Table selection allows for a specific action to be applied to the selected table(s).

Dirty

This decorator will be utilized when a table has been placed in a status of “Dirty”. Dirty tables can still be utilized by users to seat a table request.

Seated
This decorator will be utilized when a table request has been newly seated at the table. This status will remain active until the guest check associated with the table seating has placed an order. Once an order has been placed, the table will be updated to an "Occupied" status.

Occupied
This decorator will be utilized when a table request has been seated at the table and an order has been placed on the guest check. This status will remain active until the guest check has been tendered. Once the guest check has been tendered, the table will be updated to a "Paid" status.

The image associated with the occupied status will be overwritten by any images that have been defined for the KDS/Dining Courses. Those images will represent the table being occupied and within a defined coursing.

Printed
This decorator will be utilized when the guest check has been dropped. This decorator does not indicate a state change of the table as the table is still considered occupied and will be displayed in addition to the occupied decorator.

Paid
This decorator will be utilized when a table request has been completed and the guest check has been tendered. This status will remain active for the duration of time defined in TMS Parameters. Tables that are defined as "Paid" can be utilized for a new seating. Seating a table request will reset the table status.

Parent
This decorator is utilized to identify the table as being the parent table in a merged table grouping. This decorator does not indicate a status change of the table as the table and will be displayed in addition to any other status decorators.

Child
This decorator is utilized to identify the table as being the child table in a merged table grouping. This decorator will also include a text overlay that identifies the child's parent table number/name. Both Parent and Child decorators are cleared when the merged table grouping is removed.

Closed
This decorator will be utilized when a table has been placed in a status of "Closed". Closed tables cannot be utilized by users to seat a table request.

Reserved
This decorator will be utilized when a table has been placed in a status of "Reserved". Reserved tables cannot be utilized by users to seat a table request.

User Suggested
This decorator will be utilized to identify the specific table that has been included in the table seating request. This decorator will only be shown when the table request record on the Simphony Wait List has been highlighted.

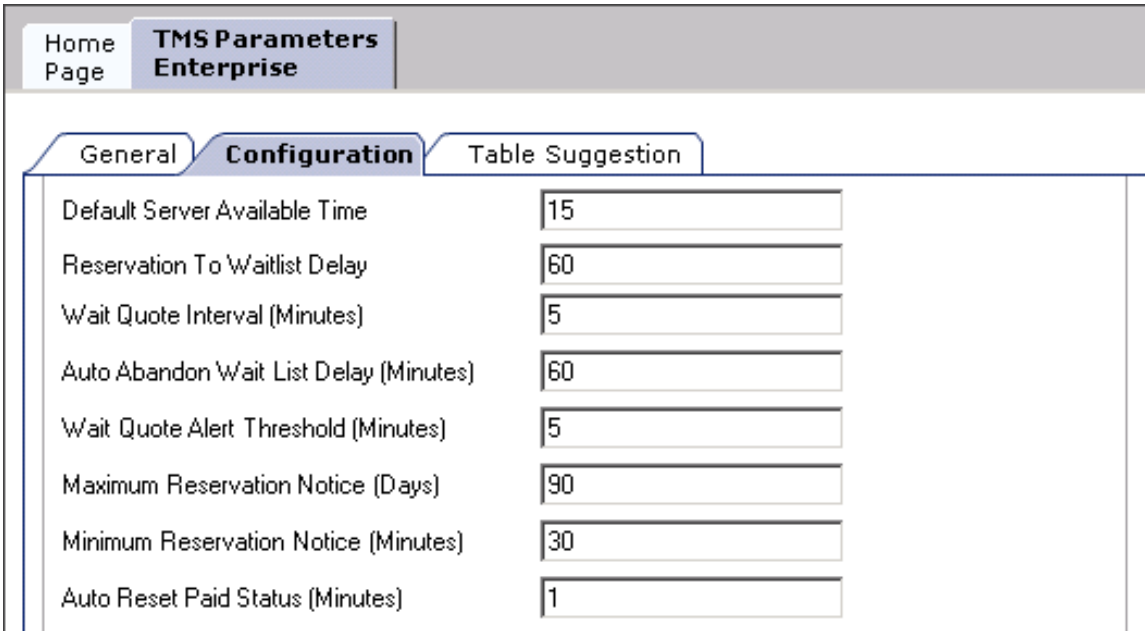
System Suggested
This decorator will be utilized by the Table Suggestion System to identify the table as the recommended seating placement for the highlighted table request on the Simphony Wait List.

Highlighted Area
DO NOT USE. Feature is being deprecated.

Host Area
This image is not a table decorator, but an optional image placement for the Host Mode form. This could be used to place the logo of the restaurant on the page defined for hosting.

Operating Parameters

Within the TMS Parameters configuration are a number of operating parameters utilized by TMS. Navigate to **Setup tab | TMS Parameters | Configuration tab**.

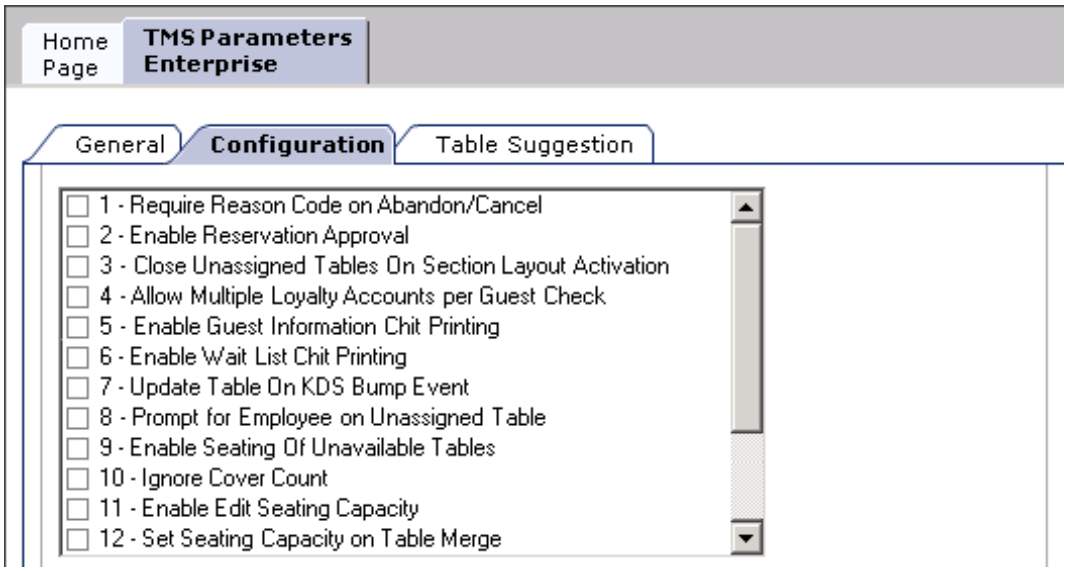


Default Server Available Time (Minutes)
This parameter defines the default number of minutes to use when making a server unavailable in TMS. This can be set to a duration between 1 and 480 minutes.

Auto Reset Paid Status (Minutes)
This parameter defines the number of minutes in which the table will be shown as paid on the host page before returning to an available status. This can be utilized to define a buffer of time between when the table is tendered, cleaned and available for a new seating. Setting a value of 0 (zero) or empty (blank) will default to 1 minute.

Option Bits

The option bits that are part of the TMS Parameters are used to enable/disable certain functions or behaviors in TMS. Navigate to **Setup tab | TMS Parameters | Configuration tab**.



Close Unassigned Tables on Section Layout Activation

This option bit determines whether any tables that are not assigned to a section when a table layout is activated are automatically closed.

Allow Multiple Loyalty Accounts per Guest Check

This option bit determines whether the Guest Check will be allowed to associate multiple loyalty accounts to the Guest Check. When this option is disabled, a single loyalty account may be associated with the Guest Check. When enabled, the user will be prompted to select the seat(s) to associate any additional loyalty accounts provided towards the Guest Check.

Enable Guest Information Chit Printing

If enabled, a chit is produced on the local printer when the table request is seated. This chit contains information about the table request.

Update Table on KDS Bump Event

This option bit determines when the coursing on the table image shown on the host page will be updated. When this option is disabled, the KDS/Dining Course on the table image will be updated after the menu item added to the Guest Check is service totaled. When enabled, the KDS/Dining Course on the table image will be updated after the menu item is bumped from the KDS. This option should only be enabled if the property/revenue center will be utilizing a KDS environment and desires this behavior.

Prompt for Employee on Unassigned Table

This option bit determines whether a table can be seated that does not currently have a Server assigned to the table. When enabled, the user will be prompted to select a server to assign to the table as it is being seated. This is only applicable if the table did not already have a server assignment.

Enable Seating Of Unavailable Tables

This option bit determines whether the user will be permitted to seat at a table that is currently defined as unavailable. This includes those tables currently defined as Closed, Dirty, or Reserved.

Ignore Cover Count

This option bit determines the initial Guest Count defined on the Guest Check when the table request is seated. When disabled, the Cover Count defined on the table request will be provided to the Guest Check as the initial Guest Count. When enabled, the Cover Count is not provided to the Guest Check; instead the system relies on Guest Check configuration to determine the value to define for the Guest Count.

This option bit is used primarily for those operations that are looking to maintain a valid Cover Count for the seating record but increment the Guest Count from 0 to a number based upon the menu items that are ordered on the Guest Check (Entrée count).

> *In [RVC level] | RVC Parameters | General, the option bit "Use Number of Seats for Guest Count" should be disabled when "Ignore Cover Count" is enabled.*

Enable Edit Seating Capacity

This option bit allows the user to change the seating capacity of a table from its configured number of seats.

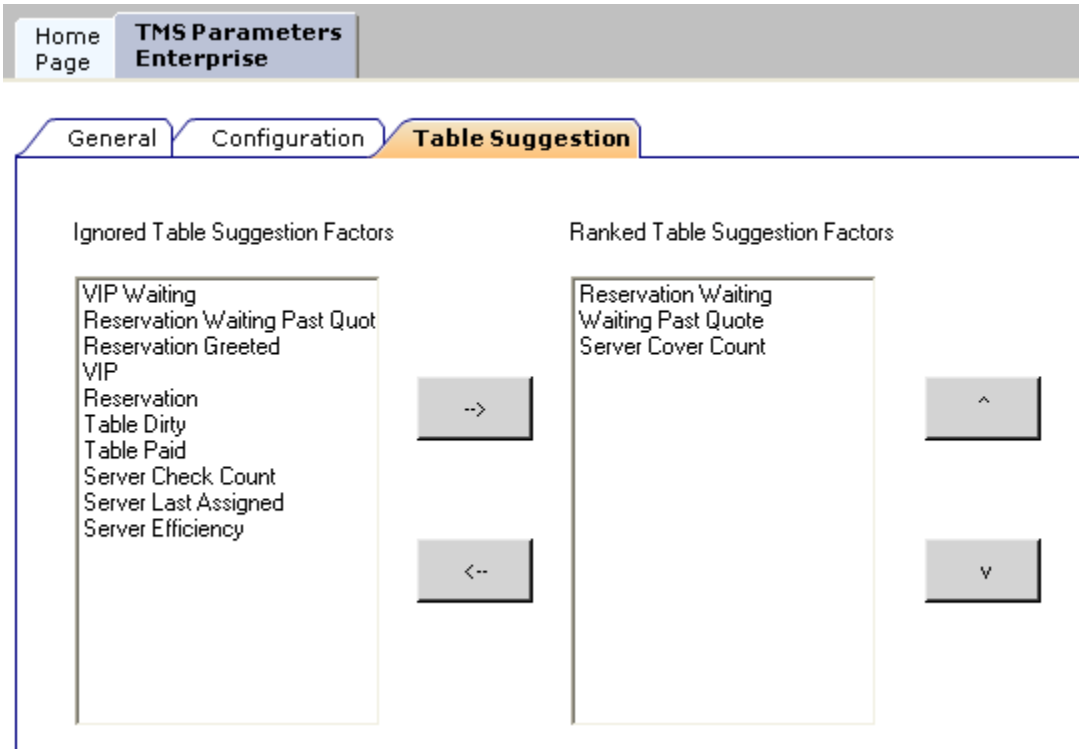
Set Seating Capacity on Table Merge

This option bit determines whether the user will be prompted to enter the new number of seats for a table when a table merge is performed.

Table Suggestion

The Table Suggestion process uses a number of optional factors to determine who will be the next parties for seating, and the tables that will be suggested by TMS for seating. Navigate to **Setup tab | TMS Parameters | Table Suggestion tab**.

While all of the table suggestion factors are defined to work with each other, it is recommended that only a few factors be used initially to get a feel for how the listing and suggestion process is working for the customer. The ranking of the suggestion factors or addition/subtraction of factors can be performed to alter the results.



Items from the Ignored Table Suggestion Factors list (left) can be moved to the Ranked Table Suggestion Factors list (right) to be included in how the suggestions are calculated by TMS. The ranking of the factors in the Ranked Table Suggestion Factors list can be increased or decreased by highlighting the factor and moving it up or down in the list.

For a detailed breakdown of the calculations used by the Table Suggestion process, please see the **Table Suggestion Factors Appendix** near the end of this document.

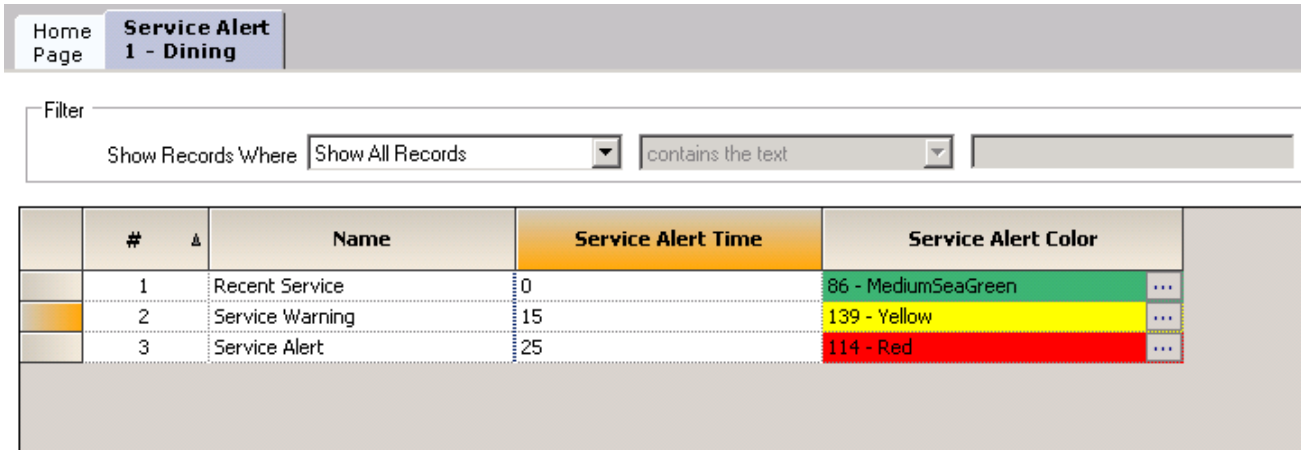
Alerts

Service Alerts

Service Alerts can provide the user with a visual indication of how long the party seated at the table has gone since the last service interaction (menu item ordered). Service Alerts are optional and, if not defined, will not track service intervals on the guest check. Navigate to **Setup tab | Service Alerts**.

Name

The name of the service alert as it will be represented to the user in TMS



Service Alert Time

Set the service alert time to how many minutes since the last service total should elapse before triggering the service alert. To start the alert immediately upon seating of the table request, set the time to 0. The timer is reset back to 0 with the service total of a new menu item to the guest check.

Service Alert Color

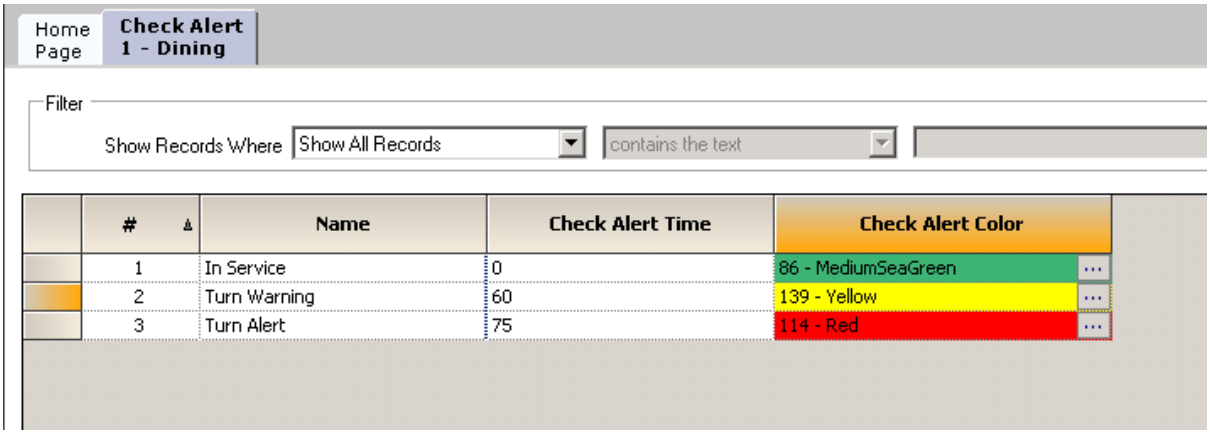
The Service Alert Color is utilized to distinguish one alert from another in the Service Alert area of the table on the host page. Only those tables that have been seated will display a service alert.

Check Alerts

Check Alerts can provide the user with a visual indication of how long the party has been seated at the table, and will change the alert as they pass defined thresholds. Check Alerts are optional and, if not defined, will only track the duration of time the guest check is open and will not change the color. Navigate to **Setup tab | Check Alerts**.

Name

The name of the check alert as it will be represented to the user in TMS.



Check Alert Time

Set the check alert time to how many minutes since the check was opened before triggering the next check alert. To start the alert immediately upon seating of the table request, set the time to 0. The timer is reset back to 0 with the service total of a new menu item to the guest check. The check alert will remain in the last defined alert until the guest check is closed.

Check Alert Color

The Check Alert Color is utilized to distinguish one alert from another in the Check Alert area of the table on the host page. Only those tables that have been seated will display a check alert.

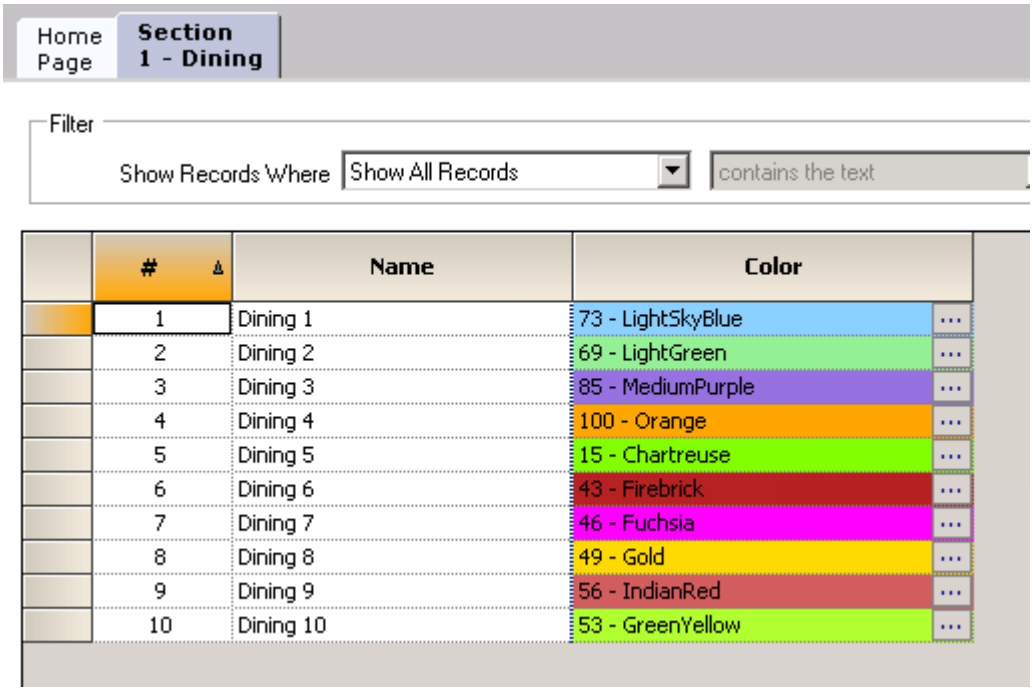
Section

Section

Sections are used to group tables within a defined area or station to indicate those tables are assigned to a specific server. Navigate to **Setup tab | Section**.

Name

The section name entered will be represented in TMS for all views and reports.



Color

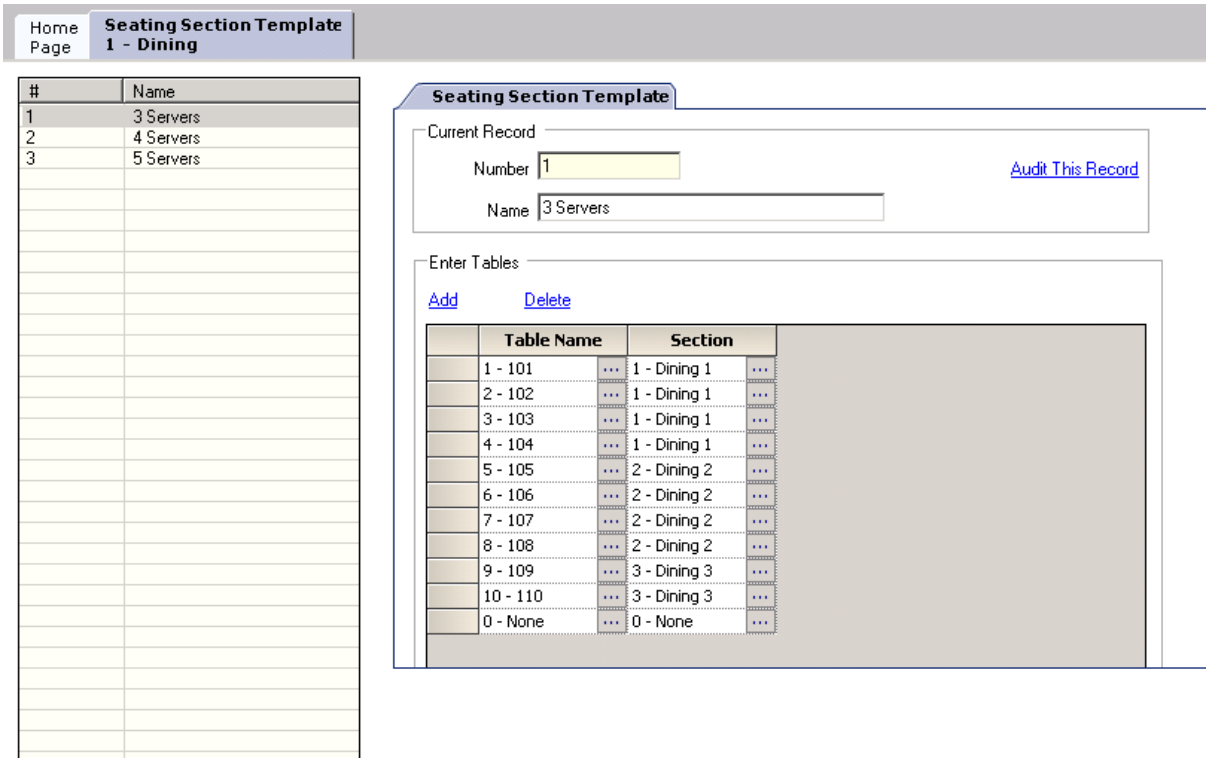
The section color is used to distinguish one section from another when viewing the tables on the host page. Only those tables that have been assigned to a section will inherit the section color.

Seating Section Templates

Seating Section Templates allow for the creation of predefined table layouts where tables are pre-populated to a specific section. The creation of these templates is optional as layouts can be defined and saved at the property level. Navigate to **Setup tab | Seating Section Templates**.

Name

The name is used to distinguish and describe the template that is being created.



Enter Tables

To define a table as part of this temple, select the “Add” option. From the new record, click the build box to be presented with the list of tables defined for this revenue center. Alternatively, you can enter the table ID and press Tab. The initial section for the newly added table will be “0 – None”. Select the section from the available list or enter the Section ID.

Reservation Periods

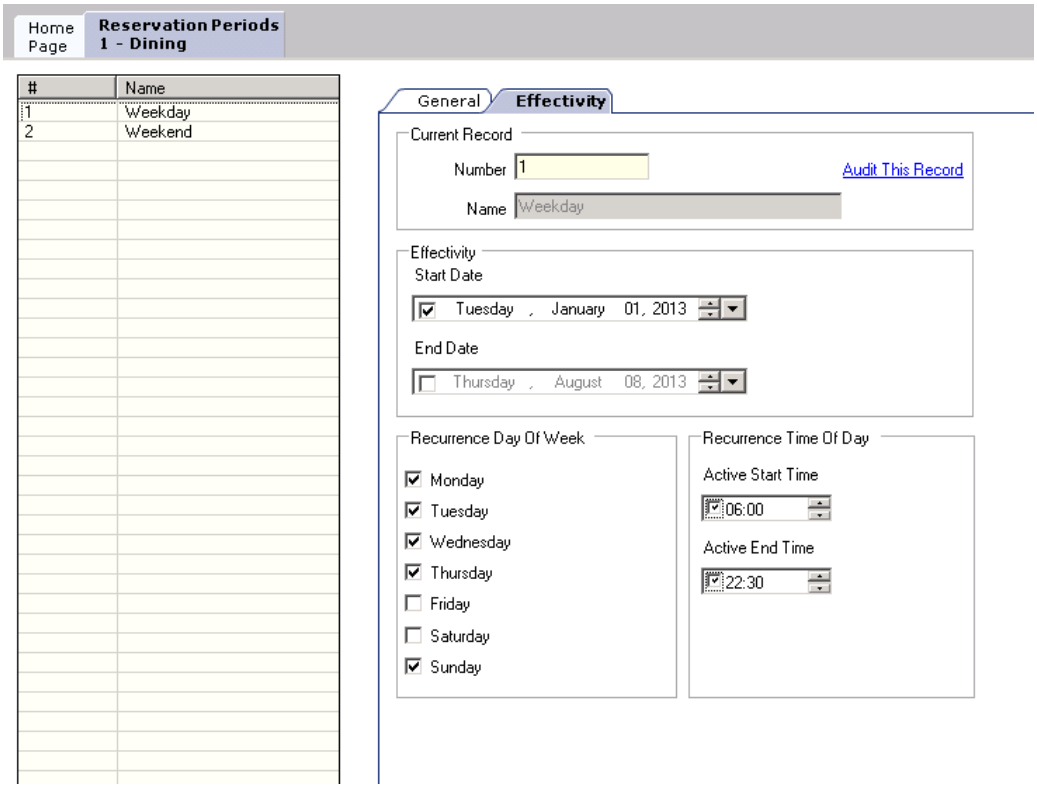
Period Definition / Effectivity

Reservation Periods provide a way to define availability for reservations for Simphony Reservations and turn times for Simphony Wait List. The creation of a Reservation Period is not required unless using Simphony Reservations or Simphony Wait List.

Navigate to **Setup tab | Reservation Period**.

Name

Name used to describe the reservation period.



Effectivity Start Date

The Effectivity Start Date defines the calendar day that this reservation period will be effective. If left unchecked, Simphony Reservations and Wait List will assume the reservation period is already in effect.

Effectivity End Date

The Effectivity End Date defines the calendar day that this reservation period will be effective through. If left unchecked, Simphony Reservations and Wait List will assume the reservation period will remain in effect.

Recurrence Day of Week

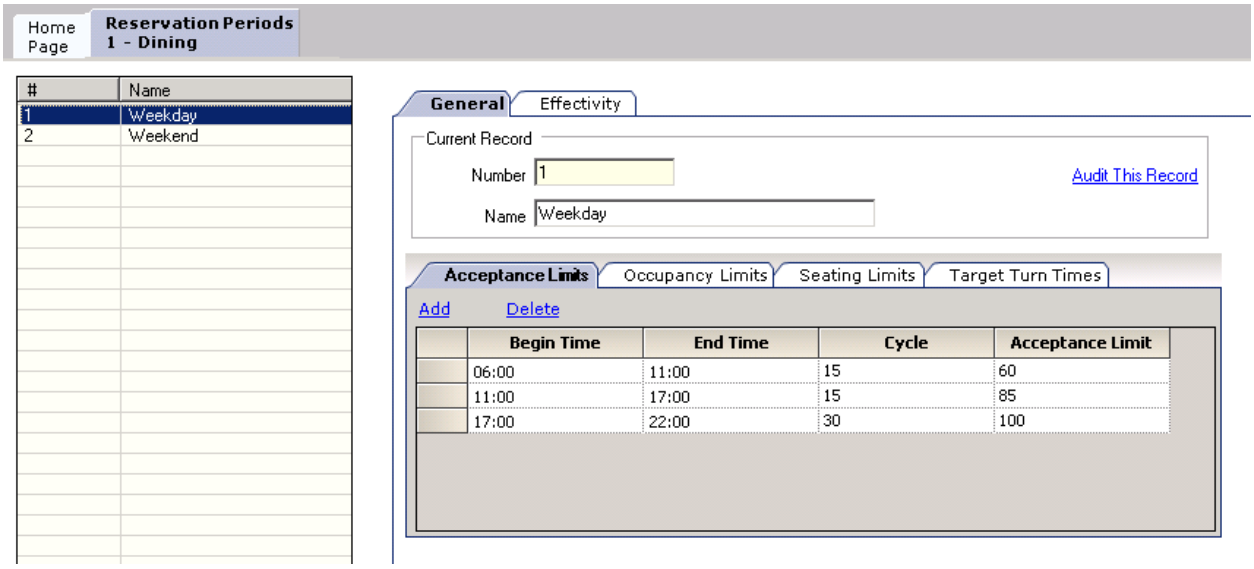
The Recurrence Day of Week defines the days of the week that will be effective in this reservation period. At least one day must be selected in order to save the reservation period.

Recurrence Time of Day

The Recurrence Time of Day defines the time of the day (those selected) that will be effective in this reservation period. If the Active Start Time is left unchecked, Simphony Reservations and Wait List will assume the reservation period will remain in effect starting at 00:00:00 on the applicable calendar days. If the Active End Time is left unchecked, TMS will assume the reservation period will remain in effect until 23:59:59 on the applicable calendar days.

Acceptance Limits

Acceptance Limits define the interval in minutes in which reservations can be made and the maximum new allowable covers within that interval. To create a new Acceptance Limit, click the "Add" link. If no Acceptance Limit is created within this reservation period, the reservation period will use the default values listed below.



Begin Time

This value defines the time in which the defined Acceptance Cycle and Limit will begin. If an Acceptance Limit has been added to the Reservation Period, a Begin Time is required. If an Acceptance Limit is not created, it will use the default value of 00:00:01.

End Time

This value defines the time in which the defined Acceptance Cycle and Limit will end. If an Acceptance Limit has been added to the Reservation Period, an End Time is required. If an Acceptance Limit is not created, it will use the default value of 00:00:00.

Cycle

This value defines the interval in minutes in which reservations can be accepted. If an Acceptance Limit has been added to the Reservation Period, a Cycle value is required. If an Acceptance Limit is not created, it will use the default value of 15 minutes.

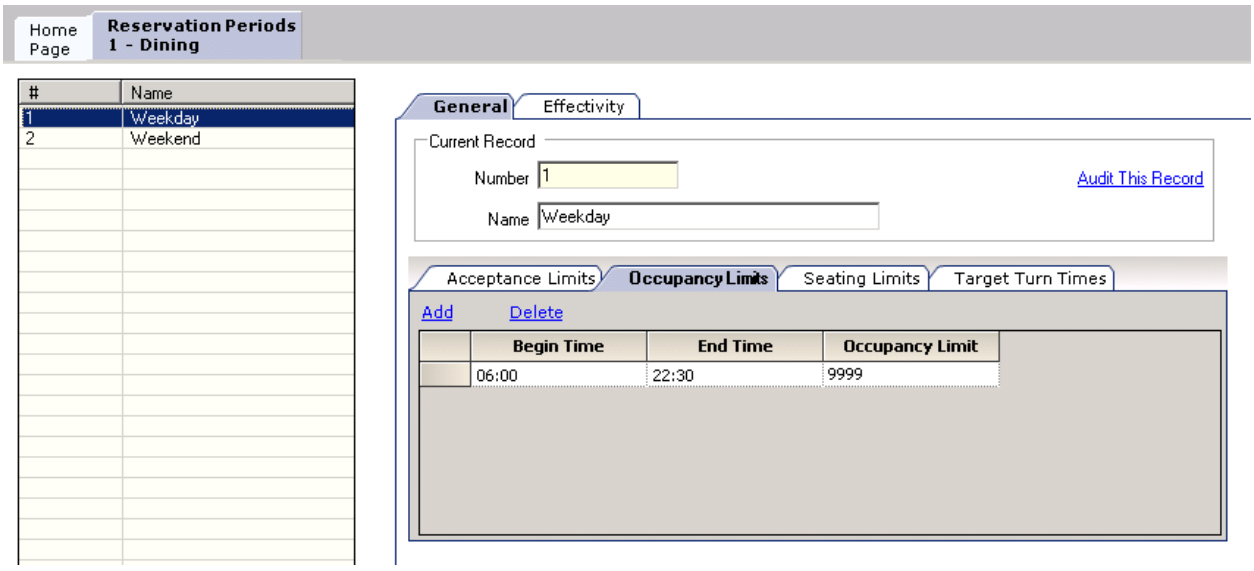
Acceptance Limits

The Acceptance Limit value is utilized to assist in limiting the potential workload going into the kitchen. A value of 60 would instruct Simphony Reservations to prevent any new reservations for that defined cycle once the number of covers for all reservations in that cycle has reached or exceeded the limit.

If an Acceptance Limit has been added to the Reservation Period, an Acceptance Limit value is required. If an Acceptance Limit is not created, it will use the default value of 9999 covers.

Occupancy Limits

Occupancy Limits define the maximum number of covers that are allowable at any one time. To create a new Occupancy Limit, click the Add link. If no Acceptance Limit is created within this reservation period, the reservation period will use the default values listed below.



Begin Time

This value defines the time in which the defined Occupancy Limit will begin. If an Occupancy Limit has been added to the Reservation Period, a Begin Time is required. If an Occupancy Limit is not created, it will use the default value of 00:00:01.

End Time

This value defines the time in which the defined Occupancy Limit will end. If an Occupancy Limit has been added to the Reservation Period, an End Time is required. If an Occupancy Limit is not created, it will use the default value of 00:00:00.

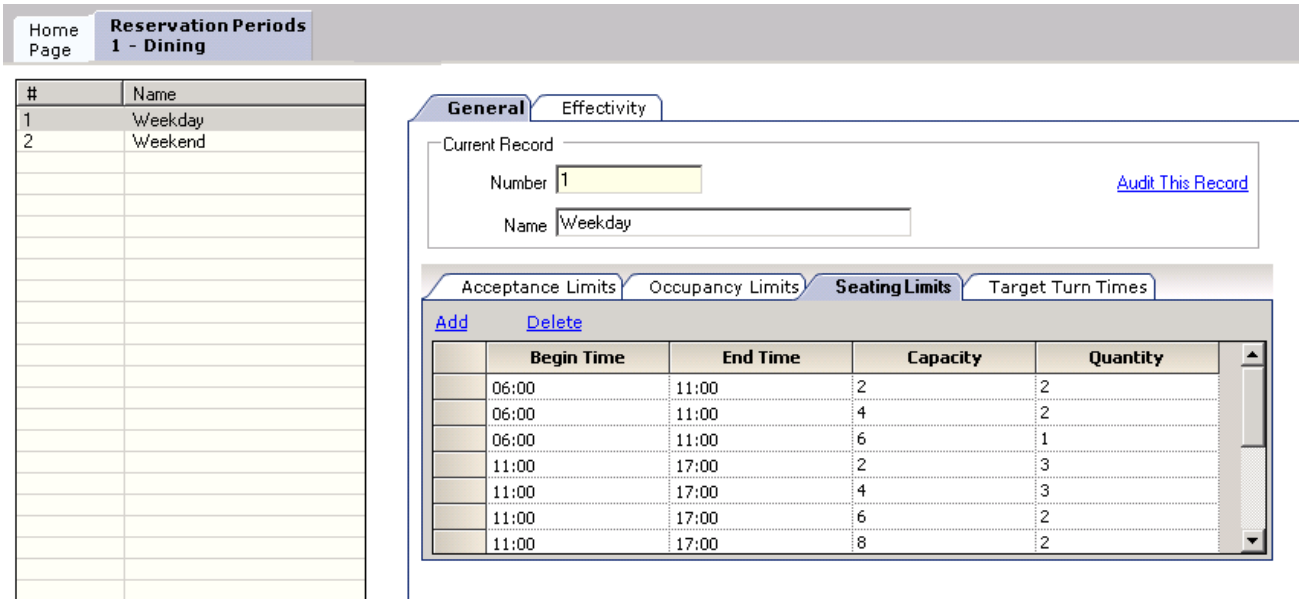
Occupancy Limits

The Occupancy Limit value is utilized to assist in preventing a situation where the occupancy limitation of the revenue center is exceeded. A value of 250 would instruct Simphony Reservations to prevent any new reservations for that defined cycle once the number of covers for all reservations within that timeframe is reached or exceeded.

If an Occupancy Limit has been added to the Reservation Period, an Occupancy Limit value is required. If an Occupancy Limit is not created, it will use the default value of 9999 covers.

Seating Limits

Seating Limits define the number of available reservations that are allocated based upon the Cycle defined in the Acceptance Limits and Party Size. To create a new Seating Limit, click the "Add" link. If no Seating Limit is created within this reservation period, the reservation period will use the default values listed below.



Begin Time

This value defines the time in which the defined Seating Limit will begin. If a Seating Limit has been added to the Reservation Period, a Begin Time is required. If a Seating Limit is not created, it will use the default value of 00:00:01.

End Time

This value defines the time in which the defined Seating Limit will end. If a Seating Limit has been added to the Reservation Period, an End Time is required. If a Seating Limit is not created, it will use the default value of 00:00:00.

Capacity

This value defines the number of covers in the party. If a Seating Limit has been added to the Reservation Period, a Capacity value is required. If a Seating Limit is not created, it will use the default value of Unlimited.

The value entered in Capacity will always carry down to any lower values unless a lower value has been defined. Defining a Capacity of 4 will include requests for a capacity of 1 through 4. The exception is if a lower value capacity of 2 is defined. Then the capacity of 2 would be used for parties of 1-2 and the capacity of 4 would be used for parties of 3-4.

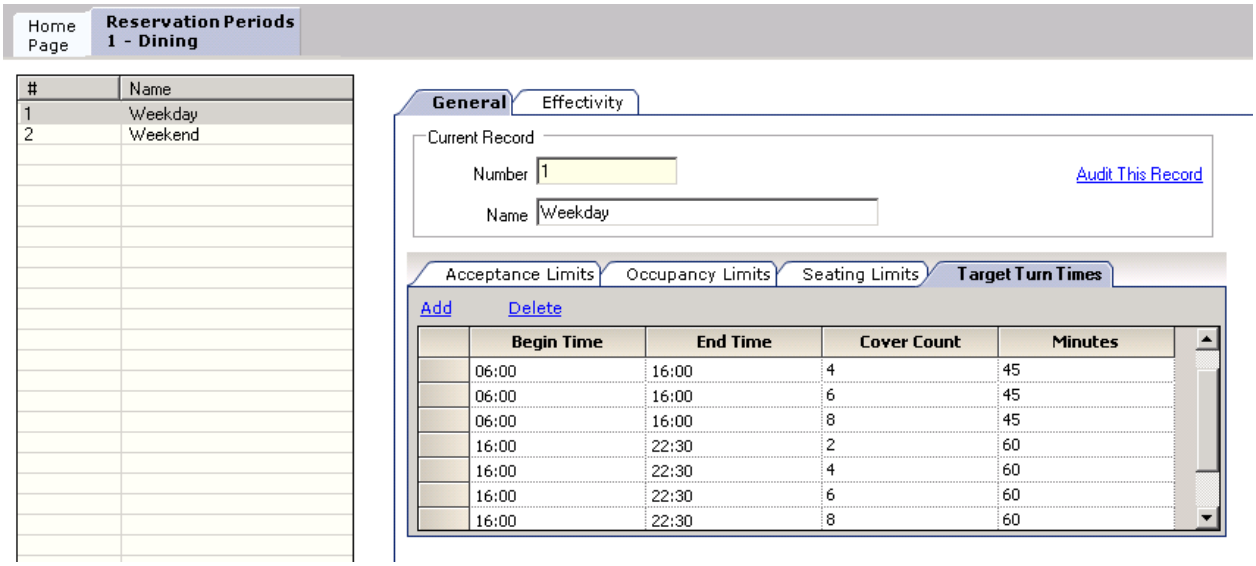
Quantity

This value defines the number of allocated reservations for the Cycles within this timeframe that will be made available. If a Seating Limit has been added to the Reservation Period, a Quantity value is required. If a Seating Limit is not created, it will use the default value of Unlimited.

This field only defines the number allotted and does NOT represent the current inventory.

Target Turn Times

Target Turn Times define the target time from seating to request completion for a seated party. Target Turn Times are utilized by Simphony Reservations to prevent overbooking and with the Wait Quoting in Simphony Wait List to estimate wait times for Walk-In table requests. The Target Turn Times are also utilized by the Table Suggestion System in TMS to anticipate the tables that will be available in order to distribute the table seating appropriately. To create a new Seating Limit, click the "Add" link. If no Seating Limit is created within this reservation period, the reservation period will use the default values listed below.



Begin Time

This value defines the time in which the defined Cover Count and Target Turn Time will begin. If a Target Turn Time has been added to the Reservation Period, a Begin Time is required. If a Target Turn Time is not created, it will use the default value of 00:00:01.

End Time

This value defines the time in which the defined Cover Count and Target Turn Time will end. If a Target Turn Time has been added to the Reservation Period, an End Time is required. If a Target Turn Time is not created, it will use the default value of 00:00:00.

Cover Count

This value defines the number of covers seated at the table. If a Target Turn Time has been added to the Reservation Period, a Cover Count value is required. If a Target Turn Time is not created, it will use the default value of Unlimited.

The value entered in Cover Count will always carry down to any lower values unless a lower value has been defined. Defining a Cover Count of 4 will include requests for a Cover Count of 1 through 4. The exception is if a lower value cover count of 2 is defined. Then the cover count of 2 would be used for parties of 1-2 and the cover count of 4 would be used for parties of 3-4.

Minutes

The Minutes value is utilized to define the anticipated turn time in minutes for a table seating of the defined Cover Count during the defined timeframe. A value of 45 would instruct TMS that any table seatings that encompass the defined cover count during that time would assume the seating request will be 45 minutes in duration.

If a Target Turn Time has been added to the Reservation Period, a Minutes value is required. If a Target Turn Time is not created, it will use the default value of 60.

Page Design

Page Template

The use of TMS features is based upon the placement of the new TMS forms onto a page. This can be done using any of the existing templates provided in Simphony. For those properties that will be utilizing future reservations or multiple layouts, it is strongly recommended that a Tabbed Template be utilized to allow for a smoother means to navigate between lists and layouts.

With TMS there are a few rules that should be adhered to when constructing the host page as to ensure proper operation of the TMS, Reservations, and Wait List features:

1. Tabbed Pages
2. TMS, Wait List, and Reservations functions must live within the same content area on a page in order to interact. Placement of forms in one content area will not work with forms placed in other content areas

Non-Configurable Features

The following features and forms of TMS can be placed and adjusted anywhere on the defined host page but do not contain any unique configuration characteristics.

Host Command Area

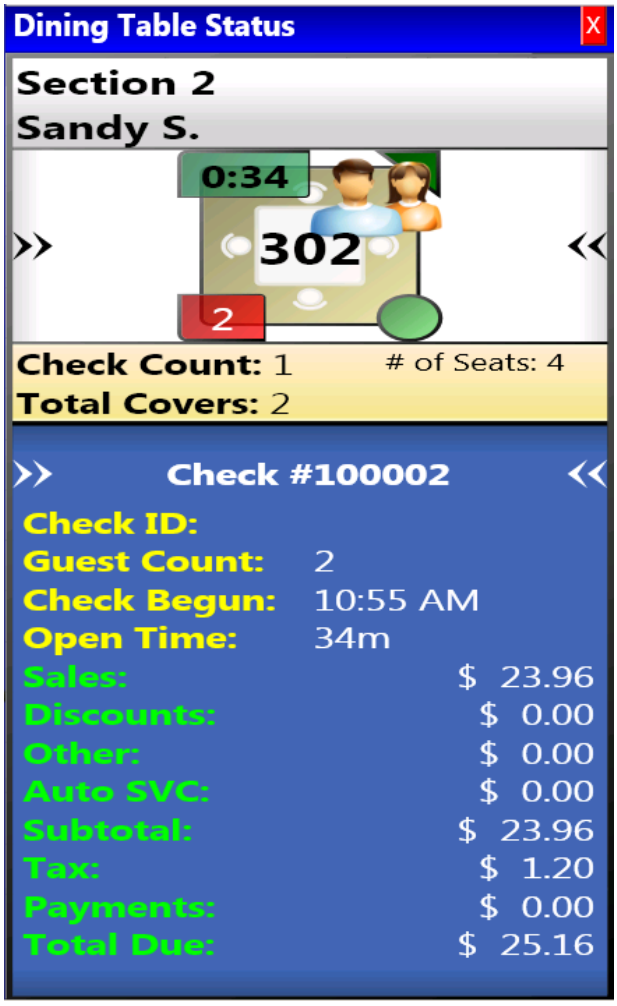
The Host Command Area is required. This is the primary form used to manage all of the hosting related functions in TMS. This form determines how hosting staff will enable/disable functions, access different features, and administer the hosting page. Host staff will perform a long-press on the form to access these features. As such, the sizing and placement of the Host Command Area should be carefully thought out to ensure it can be seen and used by all required users. To add a Host Command Area, navigate to **Configuration tab | Page Design | Edit tab | Other button | Table Management | Host Command Area**.

The Host Command Area may optionally display an image in place of the silver portion of the area. This image is defined in TMS Parameters under the Host Decoration. The selected image will scale to the sizing of the Host Command Area.

> *This area must be placed in the same content area on the page as the tables in order for the host features to function properly.*

Dining Table Status

The Dining Table Status screen is recalled and hidden from the Host Command Area. This optional screen contains information about the highlighted table and any open checks associated with the table. The sizing and placement of the Dining Table Status screen should not prevent host users from accessing any of the defined tables. IN addition, as the text size will scale with the sizing of the screen, the screen should be large enough so that text is legible to all hosting staff.

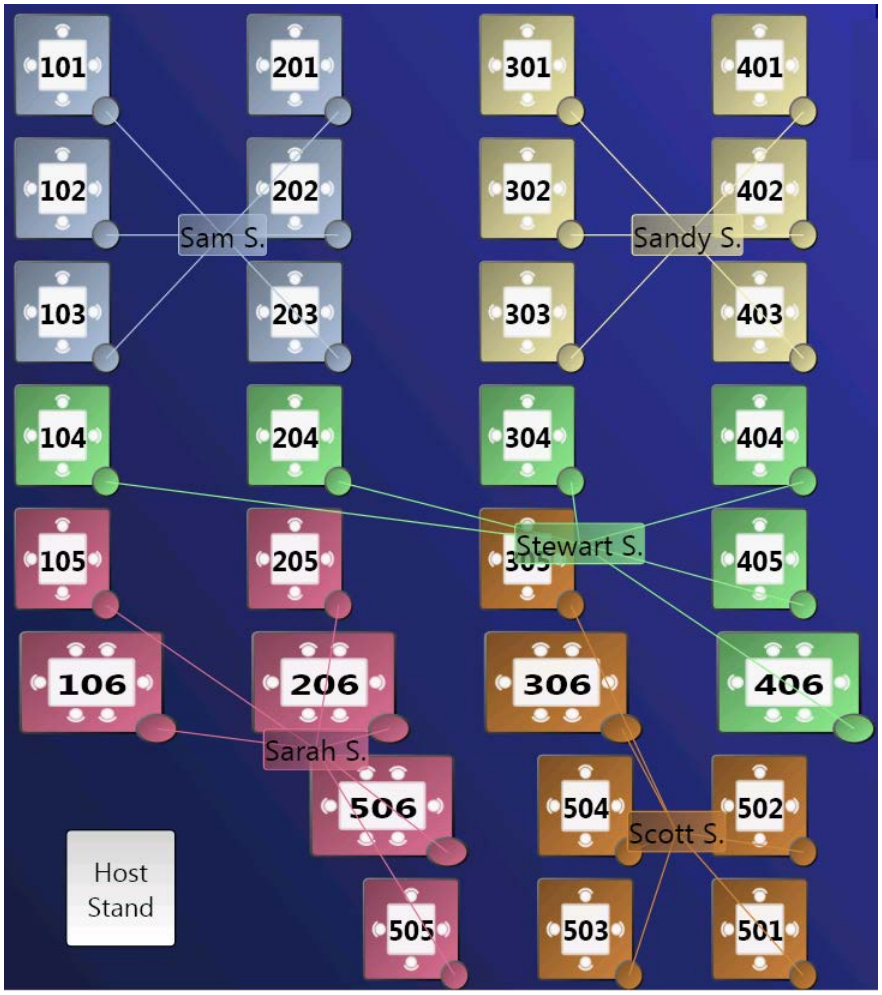


To add a Dining Table Status screen, navigate to **Configuration tab | Page Design | Edit tab | Other button | Table Management | Dining Table Status**. The Dining Table Status screen is movable on the page from the Ops Client with a Click / Hold / Drag motion.

> *This screen must be placed in the same content area on the page as the Host Command Area and tables in order for the screen to be accessed and proper information displayed.*

Employee Lines

The Employee Lines Area is a feature that is recalled and hidden from the Host Command Area. This optional area draws lines from the assigned tables to a text box containing the assigned server's name. The sizing and placement of the Employee Lines Area should be adjusted to ensure it covers all of the tables defined on the page. Tables that are not covered by the Employee Lines area will not have assignment lines drawn when enabled.

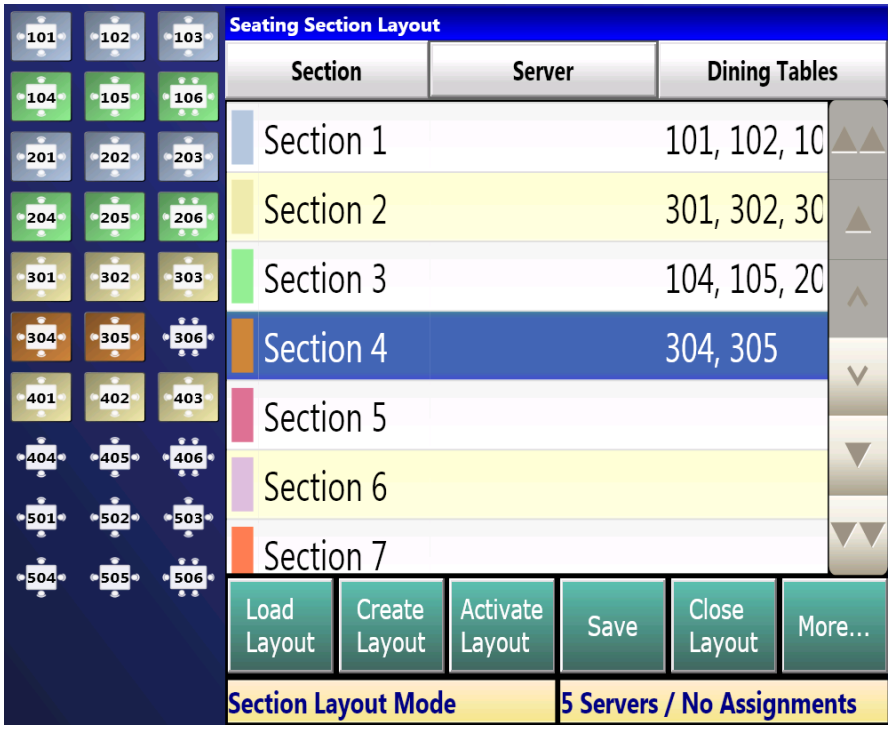


To add an Employee Lines area, navigate to **Configuration tab | Page Design | Edit tab | Other button | Table Management | Employee Lines Area**.

> *This screen must be placed in the same content area on the page as the Host Command Area and tables in order for the area to be accessed and proper information displayed.*

Section Layout

The Section Layout screen can be recalled and hidden from the Host Command Area or placed on its own page. This optional screen contains controls for the creation and administration of Seating Section Layouts where Table / Section / Server assignments can be defined. While all of this can be done individually from the Host Command Area, use of a Section Layout screen is strongly recommended.



To add a Section Layout screen, navigate to **Configuration tab | Page Design | Edit tab | Other button | Table Management | Section Layout**. The text size will scale with the sizing of the screen, so the screen should be large enough so that text is legible to all hosting staff. The assignments of tables to a section can be simplified if tables are also present on the same page or are accessible when editing a Section Layout.

Configurable Features

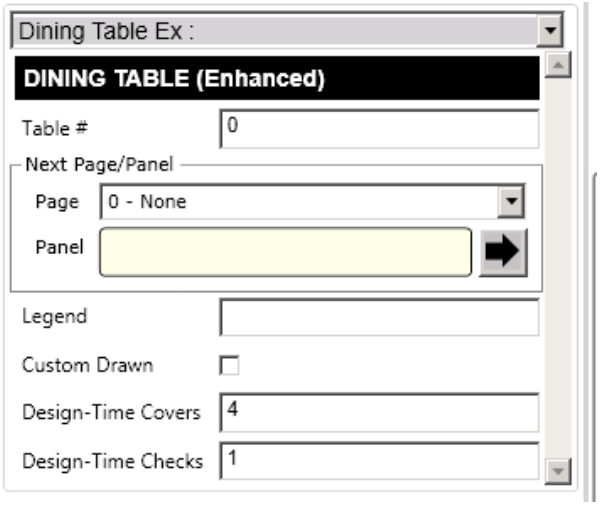
The following features and forms of TMS can be placed and adjusted anywhere on the defined host page. Each of these features will require configuration to return the desired results on the Host Page.

Dining Table (Enhanced)

The new Enhanced Dining Tables were developed to take advantage of all the features and functionality of TMS. Only the Enhanced Dining Tables can be used with TMS. Use of the legacy Dining Tables will produce undesirable results. It is strongly suggested that all existing legacy tables be replaced with Enhanced Tables.

To add an enhanced Dining Table, navigate to **Configuration tab | Page Design | Edit tab | Other button | Table Management | Dining Table (Enhanced)**. Tables will have overlays to indicate status, coursing and alerts that are present on the outer edges of the table. Leave space between tables on the page layout when placing tables. This will ensure that all indicators will be visible and will allow for easier interpretation of the current state of the table. This can be accomplished by increasing the grid configuration on the page from 24 (default) to 48.

Once the table has been placed on the page and adjusted to the desired size, the table can be configured to its unique properties.



- Table Number
  The Table Number that is entered in this filed must match the Table ID that was defined when creating the Table. Failure to use the matching Table ID will not associate the table to the Enhanced Dining Table and will present an unformatted table on the page.

- Next Page / Panel
  To return the Hosting staff user back to the host page, select the Host Page from the list that is presented after selecting the Panel arrow option.

- Legend
  If the Legend is left empty, the number or name of the table shown on the host page will utilize the table number or name defined for the Table ID. If a different name or number for the table is required, you can enter an override value in the Legend field.

- Custom Drawn
  This setting is not currently implemented and should not be enabled.

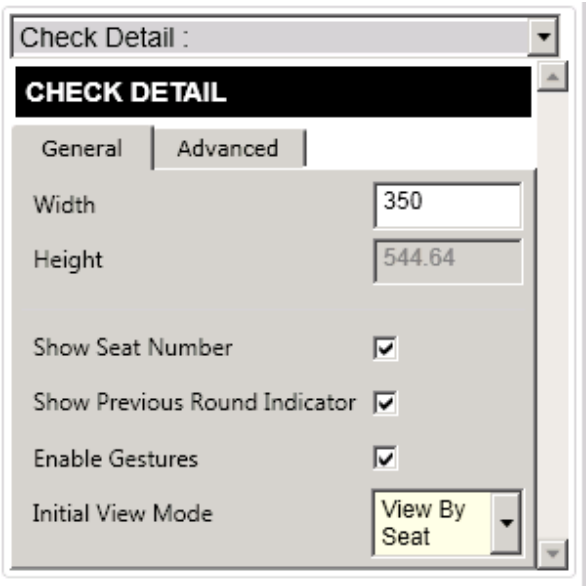
- Design-Time Covers
  This setting is not currently implemented and should not be configured.

- Design-Time Checks
  This setting is not currently implemented and should not be configured.

Guest Check

Check Detail

The Check Detail has introduced new configuration to support TMS features/functionality.



- Show Seat Number
  The Show Seat Number option will provide the user with a visual representation of the seat number that a menu item or Guest is associated with on the Check Detail.

- Enable Gestures
  When the Enable Gestures option is selected, the user will have the ability to access a menu of options when long-pressing on the Guest Check. The TMS features that are presented to the user from the long-press menu include:
  - Change Item Seat
  - Change Item Course
  - View By Item Entry
  - View By Seat
  - View By Course

- Initial View Mode
  The Initial View Mode dictates the view that will be shown to the user when initially displaying the Guest Check. A new option has been provided in the list to View By Seat. This is the recommended view mode for customers that allow multiple loyalty accounts on a single Guest Check.

Employee Section Assignment Report

The Employee Section Assignment Report can be configured to any page in which the report would need to be generated. Navigate to **Configuration tab | Page Design | Edit tab**. Create a new button on the screen and associate it with the Type of 'Ad Hoc Report'. From the selectable report list, choose option '44 - Employee Section Assignment Report'.

Configuration Levels

The table below shows those levels within EMC that will allow for configuration of functionality related to Table Management operations.

Configuration Name	Enterprise	Property	RVC	Zone
Content	*	*	*	*
Dining Table Classes	*	*	*	
Employee Maintenance	*	*	*	
TMS Parameters	*	*	*	*
TMS Privileges (Roles)	*			
Reservation Periods			*	
TMS Table Attributes	*	*	*	
KDS/Dining Course Colors	*	*		*
Loyalty Module	*	*	*	*
Page Design	*	*	*	*
Properties	*			
Seating Section Templates			*	
Sections			*	
Tables			*	

TMS Privileges

The table below shows those privileges associated with TMS functionality and the roles recommended having the privilege enabled. Navigate to **Configuration tab | Roles | [select role type] | Operations tab**, and then select the appropriate tab listed in the table below.

Tab Location	Bit Number	Privilege Name	Description	Recommended Roles
Guest Management	32020	Edit Section Layout	Allows the user to edit a section layout.	Host Manager
Guest Management	32021	Activate Section Layout	Allows the user to activate a defined section layout as the Active Layout.	Host Manager
Guest Management	32022	Delete Section Layout	Allows the user to delete an existing section layout.	Host Manager
Guest Management	32030	Assign Table to Section	Allows the user to assign a table to a section in TMS.	Host Manager
Guest Management	32031	Assign Employee to Table	Allows the user to assign an employee to a table or section in TMS.	Host Manager
Guest Management	32032	Mark Table Clean or Dirty	Allows the user to mark a table as clean or dirty.	Host Manager Busser
Guest Management	32033	Change Table State	Allows the user to mark tables as being Available, Closed, Reserved, or Merged.	Host Manager
Guest Management	32034	Seat Unsuggested Table	Allows the user to seat a table request at a table that is different than the table that was suggested by the TMS Table Suggestion System.	Host Manager
Guest Management	32037	View Legend	Allows the user to View the TMS Legend and use the available functions contained within the form.	Host Manager
Guest Management	32038	Allow Seating Guest Above or Below Table Capacity	Allows the user to seat a table request at a table that does not have support a seating capacity that would meet the defined cover count on the table seating request.	Host Manager
Guest Management	32039	Allow Seating Guest at Table that does not Meet all Required Table Preferences	Allows the user to seat a table request at a table that does not meet all of the seating preferences defined on the table seating request.	Host Manager
Guest Management	32040	Edit Server Availability	Allows the user to edit the server availability.	Host Manager
Ad Hoc Reports	31044	Run Employee Section Assignment Report	Allows the user to run the Employee Section Assignment Report.	Host Manager
Transactions	22	Post Payment to Checks Belonging to Another Operator	Required privilege to support the unseating of a table request.	Host Manager
Transactions	37	Authorize/Perform Posting of Payment	Required privilege to support the unseating of a table request.	Host Manager
Transaction	38	Authorize/Perform Closing of Checks with a Zero Balance	Required privilege to support the unseating of a table request.	Host Manager

Tab Location	Bit Number	Privilege Name	Description	Recommended Roles
Guest Checks	18	Authorize/Perform Pickup of a Check Belonging to Another Operator	Required privilege to support the unseating of a table request.	Host Manager

Appendix A: Table Suggestion Factors

The following values can be used to define the request and table suggestion factor process in TMS.

Reservation Waiting
When used, this factor will place a greater value on reservations that have been waiting longer than other requests in the seating order.

Waiting Past Quote
When used, this factor will place a greater value on any reservation or walk-in requests where the request has been waiting longer than their scheduled seating time or quoted wait time.

Reservation Waiting Past Quote
When used, this factor will place a greater value on reservation requests where the request has been waiting longer than their scheduled seating time.

Reservation Greeted
When used, this factor will place a greater value on any reservation requests where the party has arrived and been greeted in the seating order.

Reservation
When used, this factor will place a greater value on reservation requests versus non-reservation requests (walk-ins) in the seating order.

VIP Waiting
When used, this factor will place a greater value on reservation requests where the party is designated as a VIP and have been waiting versus non-VIP reservation and walk-in requests that have been waiting in the seating order.

VIP
When used, this factor will place a greater value on any reservation and walk-in requests where the party is designated as a VIP in the seating order.

Table Dirty
When used, this factor will place a value during the table suggestion process on any table currently marked as "Dirty", making it more or less likely to have TMS utilize the table.

Table Paid
When used, this factor will place a value during the table suggestion process on any table currently marked as "Paid", making it more or less likely to have TMS utilize the table.

Server Check Count
When used, this factor will place a value during the table suggestion process on any server based upon their currently serviced (open and closed) check count. The Server Check Count will make it more or less likely to have TMS utilize the server for the next table seating.

Server Cover Count
When used, this factor will place a value during the table suggestion process on any server based upon their currently serviced (open and closed) cover count. The Server Cover Count will make it more or less likely to have TMS utilize the server for the next table seating.

Server Efficiency

When used, this factor will place a value during the table suggestion process on any server based upon their Server Efficiency Rating. The Server Efficiency rating will make it more or less likely to have TMS utilize the server for the next table seating.

Server Last Assigned

When used, this factor will place a value during the table suggestion process on any table based upon the table's current server assignment and the last time since they received a new table seating. The last time will make it more or less likely to have TMS utilize the server for the next table seating.

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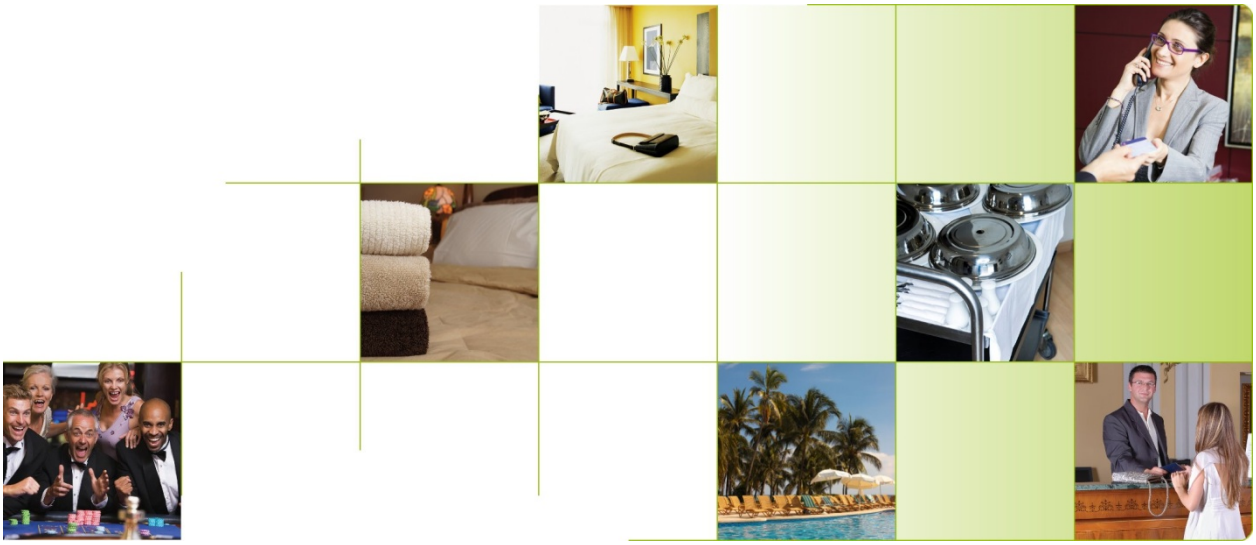

Simphony Wait List Configuration Guide

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Document Author: Simphony Product Management Documentation

MICROS Systems, Inc.
7031 Columbia Gateway Drive
Columbia, MD 21046
(443) 285-8000 / Fax: (443)-285-6505

About This Document

This guide provides instructions to configure the features that have been introduced with the new Simphony Wait List module in Simphony v2.6.

This document contains configuration information for features available with the Version 2.6 release of the MICROS Simphony software.

Who Should Be Reading This Document

This document is intended for the following audiences:

- MICROS Installers/Programmers
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes the reader has the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of basic network concepts

Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version
Rev A	January	2014	2.6.0

Document Organization

For clarity, information is divided into self-contained chapters, reflecting the configuration of the following Wait List functions:

- Prerequisite Configuration
- Wait List Feature Configuration
- TMS Parameters
- Reservation Periods
- Page Design

For more information on the usage of these features, refer to the *Simphony Wait List User Guide*, available from the MICROS website.

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Prerequisite Configuration

Simphony Table Management

To support the taking of Reservations, the Simphony Table Management System (TMS) will be required. Please refer to the *Simphony Table Management System Configuration Guide* for instructions on how to configure TMS.

Wait List Feature Configuration

Loyalty

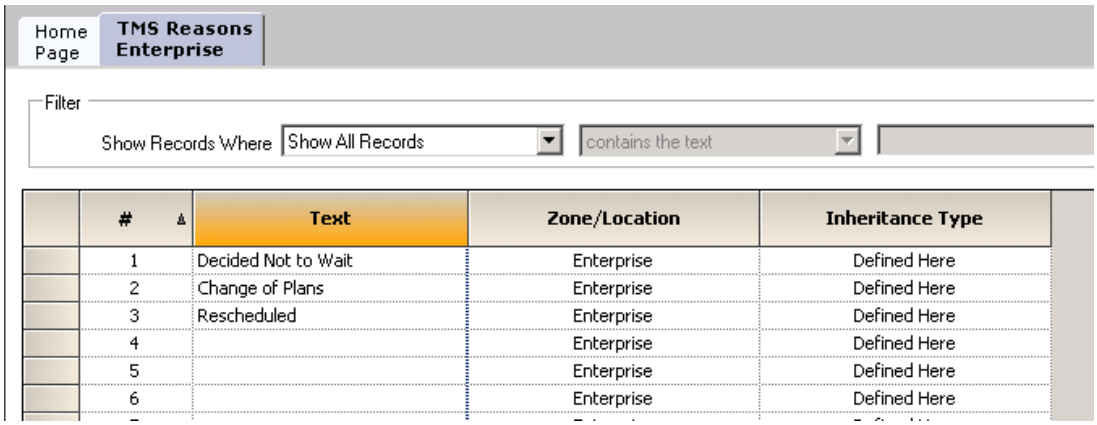
The Simphony Wait List supports integration with Loyalty applications such as Simphony Loyalty (iCare) and third-party loyalty applications based upon the Loadable Loyalty Modules. This allows for the lookup and association of loyalty accounts from the Wait List request. If loyalty integration is desired, configure the Loadable Loyalty Module in accordance with the instructions in the *Loyalty Module Configuration Guide*. For instructions on the use of the Loadable Loyalty Module with a Wait List request, please refer to the appropriate section in the *Simphony Table Management System Configuration Guide*.

Reservations/ Wait List Reason

Reservation / Wait List Reasons are utilized to define the reason a table request is being cancelled or abandoned. Navigate to **Descriptors tab | TMS Reasons**.

Reasons

Simphony allows for up to 32 reasons to be defined. Enter the reason in the text field. When prompted for a reason a request is being cancelled or abandoned, the reasons defined in this list will be presented if the system is configured to require a reason code.

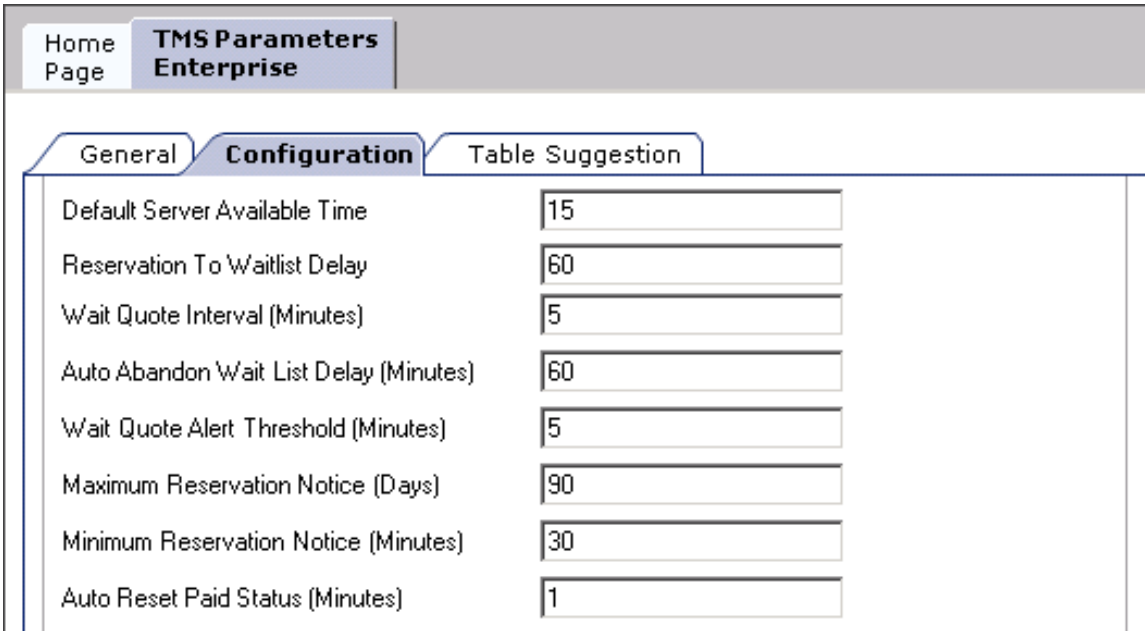


#	Text	Zone/Location	Inheritance Type
1	Decided Not to Wait	Enterprise	Defined Here
2	Change of Plans	Enterprise	Defined Here
3	Rescheduled	Enterprise	Defined Here
4		Enterprise	Defined Here
5		Enterprise	Defined Here
6		Enterprise	Defined Here

TMS Parameters

Operating Parameters

Within the TMS Parameters configuration are several operating parameters utilized by TMS, Reservations, and Wait List. We will review those settings associated with Reservations. Navigate to **Setup tab | TMS Parameters**.



Reservation to Waitlist Delay (Minutes)

This parameter defines how far before the scheduled seating time a Reservation will be visible on the Wait List. Reservation records that are visible on the Wait List will have an impact on the quote times and table suggestions.

Wait Quote Interval (Minutes)

This parameter defines the increments of time in which to allow a wait quote to be defined (e.g., every 1 minute, 2 minutes, 5 minutes, etc.).

Auto Abandon Wait List Delay (Minutes)

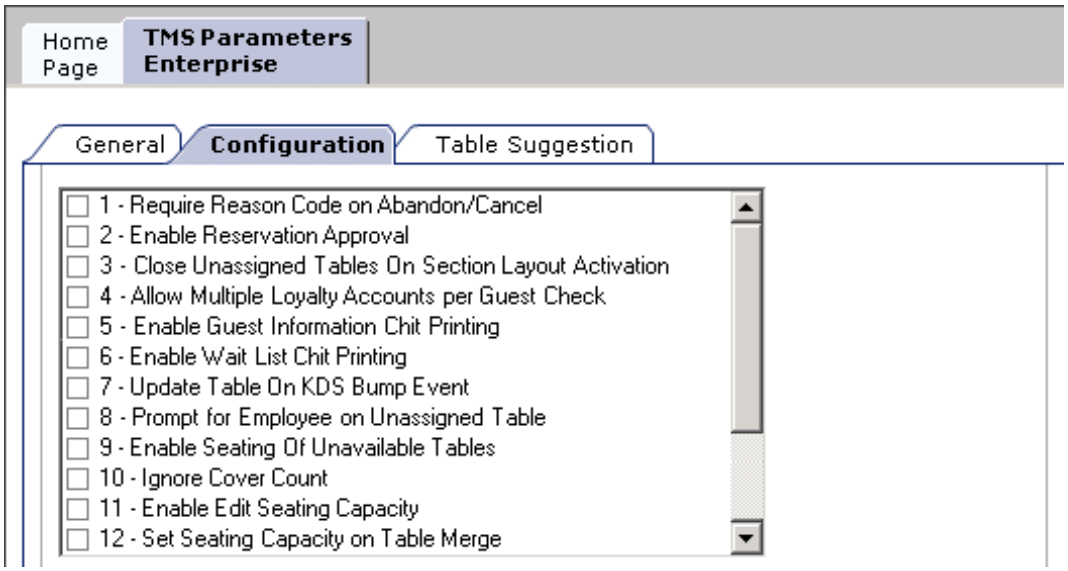
This parameter defines the number of minutes that a table request record will remain on the Wait List before it is automatically updated as Abandoned (Walk-In) or No-Show (Reservations). The record will be removed from the Wait List once this threshold has been reached.

Wait Quote Alert Threshold (Minutes)

This parameter defines the number of minutes to elapse before flagging the table request on the Wait List as being "Overdue" for seating. To have the table request flagged as soon as the amount of time quoted has been reached, set this parameter to "0".

Option Bits

The option bits that are part of the TMS Parameters are used to enable/disable certain functions or behaviors with TMS, Reservations, and Wait List. We will review those settings associated with Reservations. Navigate to **Setup tab | TMS Parameters**.



Require Reason Code on Abandon/Cancel

This option bit determines whether the user will be prompted to provide a reason for the abandonment or cancellation of the table request when manually performed by the user.

Enable Wait List Chit Printing

If enabled, a chit is produced on the local printer when the table request is created or updated. This chit contains information about the table request, as well as the estimated wait time.

Enable Create and Edit Buttons

This option bit determines whether the user will be shown buttons at the bottom of the Wait List that will allow them to create New Seating Requests or edit existing requests. When enabled, the ability to double-touch on the screen to create or edit is still permitted.

Reservation Periods

Period Definition / Effectivity

Reservation Periods provide a way to define availability for Reservation Requests. They also are used to define the projected turn times for tables based upon time and cover count. The creation of a Reservation Period is optional but recommended to utilize the Estimate Wait Quote feature.

For instructions on the configuration of Reservation Periods please refer to the appropriate section in the *Simphony Table Management System Configuration Guide*.

Page Design

Page Template

The use of Wait List features is based upon the placement of the Wait List onto a page. This can be done using any of the existing templates provided in Simphony. For those properties that will be utilizing future reservations or multiple layouts, it is strongly recommended that a Tabbed Template be utilized to allow for a smoother means to navigate between lists and layouts. To add a Wait List screen, navigate to **Configuration tab | Page Design | Edit tab | Other button | Table Management | Wait List**.

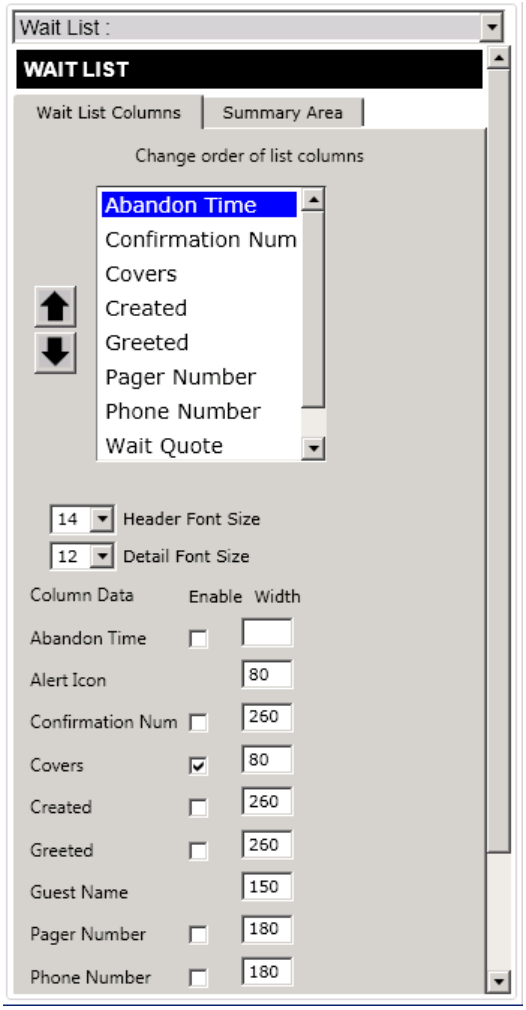
Wait List Screen

The Wait List screen can be recalled and hidden from the Host Command Area or placed on its own page. This screen contains the controls for managing all current table requests (Walk-Ins and Pending Reservations). While the Walk-In is configured on its own page, it is strongly recommended that the Wait List be located on the same page as the tables to simplify the seating process.

Once the Wait List screen has been placed on the page, selection of the screen will display the Wait List Configuration settings. The settings are broken up into two tabs: Columns and Summary.

Columns

The columns tab provides all of the settings required to configure those columns and formats that will be utilized by the Wait List when it is viewed from the page in OpsClient. Once the content for the columns has been enabled by checking the Enable option next to the desired Column Data field, the order in which they are displayed from left to right on the Wait List can be configured.



- Font Size
  The size of the font utilized to display the column headers and column data can be defined using the drop-down lists provided.

- Abandon Time
  This column is not applicable to Wait List requests and is being removed. Please do not configure your Wait List to contain this column.

- Alert Icon
  The Alert Icon is always enabled and will be the first column shown in the Wait List. This column will contain any icons that are utilized to indicate status or properties of the table request record. This includes an icon representing the Quote Status, Request Method, VIP, and Seating Preferences. The width of the Alert Icon column on the Wait List can be configured.

- Confirmation Number
  For those table request records that originated from the Reservation List, the system issued confirmation number can be shown. The width of the confirmation number column on the Wait List can be configured. The order in which the confirmation number is shown on the Wait List can be changed by selecting Confirmation Number from the sorting list and moving the field up or down.

- Covers
  This column will display the number of covers that are currently defined for the table seating request. The width of the covers column on the Wait List can be configured. The order in which the covers are shown on the Wait List can be changed by selecting Covers from the sorting list and moving the field up or down.

- Created
  This column will display the date and time that the table seating request was created. The width of the Created column on the Wait List can be configured. The order in which the Created column is shown on the Wait List can be changed by selecting Created from the sorting list and moving the field up or down.

- Greeted
  Once the table seating request has been greeted by a member of the host staff, a Greeted time can be shown. The width of the Greeted column on the Wait List can be configured. The order in which the Greeted column is shown on the Wait List can be changed by selecting Greeted from the sorting list and moving the field up or down.

- Guest Name
  This column will display the Guest Name that was entered for the table seating request. The width of the Guest Name column on the Wait List can be configured. The Guest Name column is always enabled and will be the second column shown in the Wait List.

- Pager Number
  This column will display any pager number that was entered for the table seating request. The width of the Pager Number column on the Wait List can be configured.

- Phone Number
  This column will display the phone number that was entered for the table seating request. The width of the phone number column on the Wait List can be configured. The order in which the phone number column is shown on the Wait List can be changed by selecting Phone Number from the sorting list and moving the field up or down.

- Request Method
  Enabling this column data will display an icon in the Icon Alerts column that represents the source of the table seating request (Walk-In, Phone-In, Internet).

- VIP
  Enabling this column data will display an icon in the Icon Alerts column that shows that the VIP flag in the table seating request was selected.

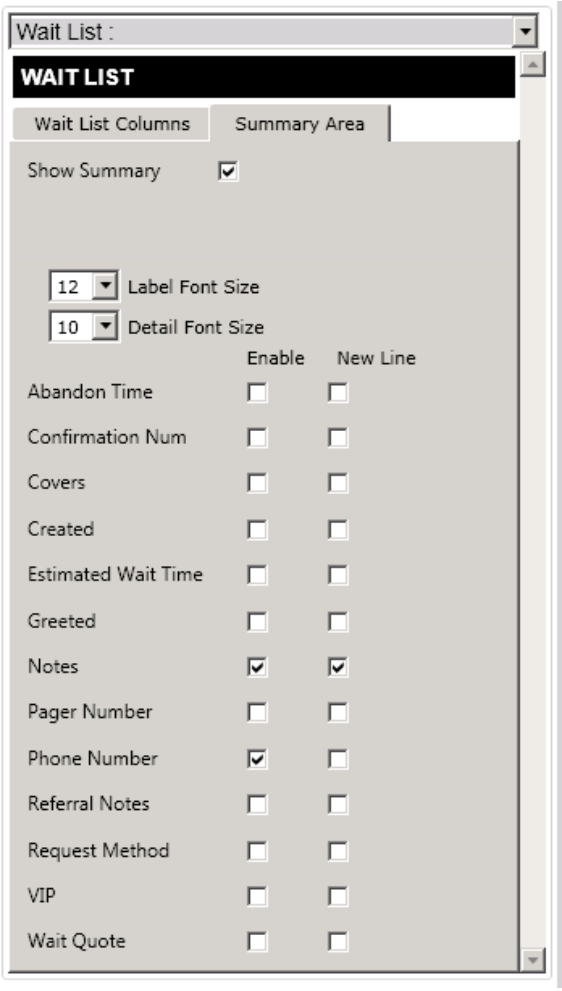
- Wait Quote
  This column will display the Wait Quote that was entered for the table seating request. The width of the Wait Quote column on the wait list can be configured. The order in which the Wait Quote column is shown on the wait list can be changed by selecting Wait Quote from the sorting list and moving the field up or down.

> *In order to properly align the columns shown in the Wait List, one of the columns that can be sorted that are not needed must be utilized. To correct this, enable the column and set the width to 1. In the sort list, highlight the column data and move to the bottom.*

Summary

The summary tab provides the ability to show and configure those table request details that will be shown when the table request is highlighted on the Wait List.

If a summary is not desired, uncheck the Show Summary option. If Show Summary is enabled, the content for the summary can also be enabled by checking the Enable option next to the desired Column Data field. An option to have this data shown on a new line within the Summary area is also available.



- Font Size
  The size of the font utilized to display the summary label and details can be defined using the drop-down lists provided.

- Abandoned Time
  This summary option is not applicable to the table seating requests and is being removed. Please do not configure your Wait List to contain this summary data.

- Confirmation Number
  This summary option will contain the confirmation number associated with the table seating record.

- Covers
  This summary option will contain the number of covers associated with the table seating record.

- Created
  This summary option will contain the date and time the record was created.

- Estimated Wait Time
  This summary option will contain the amount of time that is estimating the customer has remaining until a table will be ready for them. This value is different from the wait quote, which is a static amount of time that the customer was quoted. The Estimated Wait Time will change as tables are freed up and new table seating requests are made.

- Greeted
  This summary option will contain the time the record was greeted by a hosting staff member.

- Notes
  This summary option will contain any text that has been included in the Notes field of the table seating record. This field can hold up to 255 characters of text and will automatically wrap in the summary area when required.

- Pager Number
  This summary option will contain the pager number that was associated with the table seating record.

- Phone Number
  This summary option will contain the phone number that was associated with the table seating record.

- Referral Notes
  This summary option will contain any text that has been included in the referral notes field of the table seating record. This field can hold up to 255 characters of text and will automatically wrap in the summary area when required.

- Request Method
  This summary option will contain a text description (Walk-In, Phone-In, and Internet) of the request method for the table seating record.

- VIP
  This summary option will display “VIP” in the summary area if the table seating record has been flagged as being a VIP.

- Wait Quote
  This summary option will contain the Wait Quote that was associated with the table seating record.

Configuration Levels

The table below shows those levels within EMC that will allow for configuration of functionality related to Wait List operations.

Configuration Name	Enterprise	Property	RVC	Zone
TMS Parameters	*	*	*	*
TMS Reasons	*	*	*	*
Reservation Periods			*	
Wait Quote Configuration			*	
TMS Table Attributes	*	*	*	
Loyalty Module	*	*	*	*
Page Design	*	*	*	*

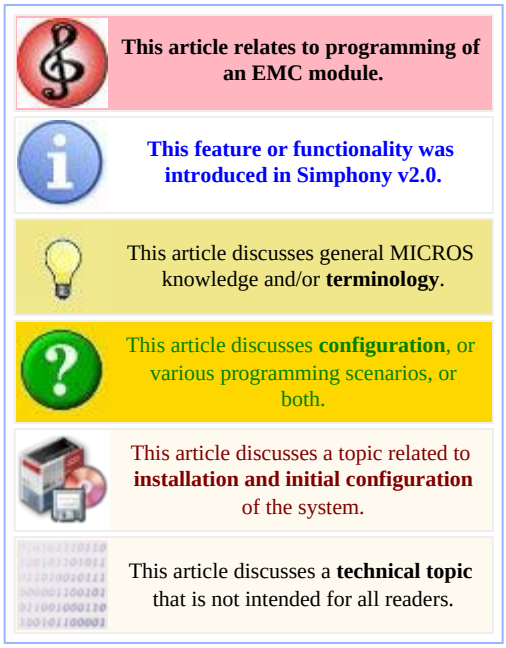
Wait List Privileges

The table below shows those privileges associated with Wait List functionality and the roles recommended having the privilege enabled. Navigate to **Configuration tab | Roles | [select role type] | Operations tab**, and then select the appropriate tab listed in the table below.

Tab Location	Bit Number	Privilege Name	Description	Recommended Roles
Guest Management	32001	Add Wait List Entry	Allows user to create a new Wait List request record.	Host Manager
Guest Management	32002	Edit Wait List Entry	Allows user to edit an existing Wait List request record.	Host Manager
Guest Management	32003	Abandon Wait List Entry	Allows user to abandon a Wait List request record.	Host Manager
Guest Management	32004	Seat Wait List Entry	Allows user to seat a Wait List request record.	Host Manager
Guest Management	32005	Unseat Wait List Entry	Allows user to unseat a Wait List request record that has already been seated.	Host Manager
Guest Management	32006	Greet Wait List Entry	Allows user to greet a Wait List request record.	Host Manager
Guest Management	32007	Mark as No Show	Allows user to mark a reservation request record as a no-show.	Host Manager

Simphony Zones

In the **Zone Configuration** module, a user defines hierarchies and hierarchical relationships within the Enterprise. The primary function for the use of Zones is to group similar aspects of an Enterprise together to eliminate the need to program multiple records that serve the same purpose throughout the Enterprise environment.



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- 1 Overview
- 2 Using Zones
  - 2.1 Illustrations
- 3 Zone Configuration
  - 3.1 EMC Programming
  - 3.2 Zone Rule Configuration and Enforcement
  - 3.3 EMC Zone Navigation\Filtering
- 4 Conclusion
- 5 See also

Overview

What are Zones? To better understand them, there are some terms that must be defined. As stated in the **Inheritance and Overrides** article, the terms **Inheritance** and **Override** are used to describe functionality that allows a record to be created outside of its traditional scope for the purpose of creating a single record to exist in one hierarchy as opposed to creating an identical record in numerous locations. This functionality was introduced in Simphony 2.0.

- To see all of the progammable record types and the location(s) where each type can be programmed, see List of EMC Record Types.

In previous Simphony versions, it was common for a user to create a record and then distribute it to a number of properties or RVCs. For example, a discount named **Open % Discount** with Object (or record) # 1 may have been configured and distributed to every property. If a system contains 900 properties, there would be 900 individual discount records with Object # 1 assigned. With the *inheritance* functionality, it's possible to configure the record one time and have all 900 properties use (or inherit) the same record. In addition, an individual property can *override* the record if the configuration needs to differ from the inherited version. This article will review the steps in the basic programming of an Enterprise's Zone module configuration.

Using Zones

How can the use of Zones help an Enterprise environment? Effective Zone configuration can assist in managing definitions and records in a more streamlined and timely fashion. No matter if the definitions are Menu Items or Price records or Discounts, these records may be programmed on the Enterprise level and inherited throughout the entire system. If there are unique circumstances where it's desired for a particular definition to be different from an inherited record, it's possible for any record to be overridden at the Property or RVC level if necessary.

The use of Zones or user defined configuration hierarchies performs the following;

- Controls access of locations from within the EMC
- Controls Definition distribution to clients

Examples:

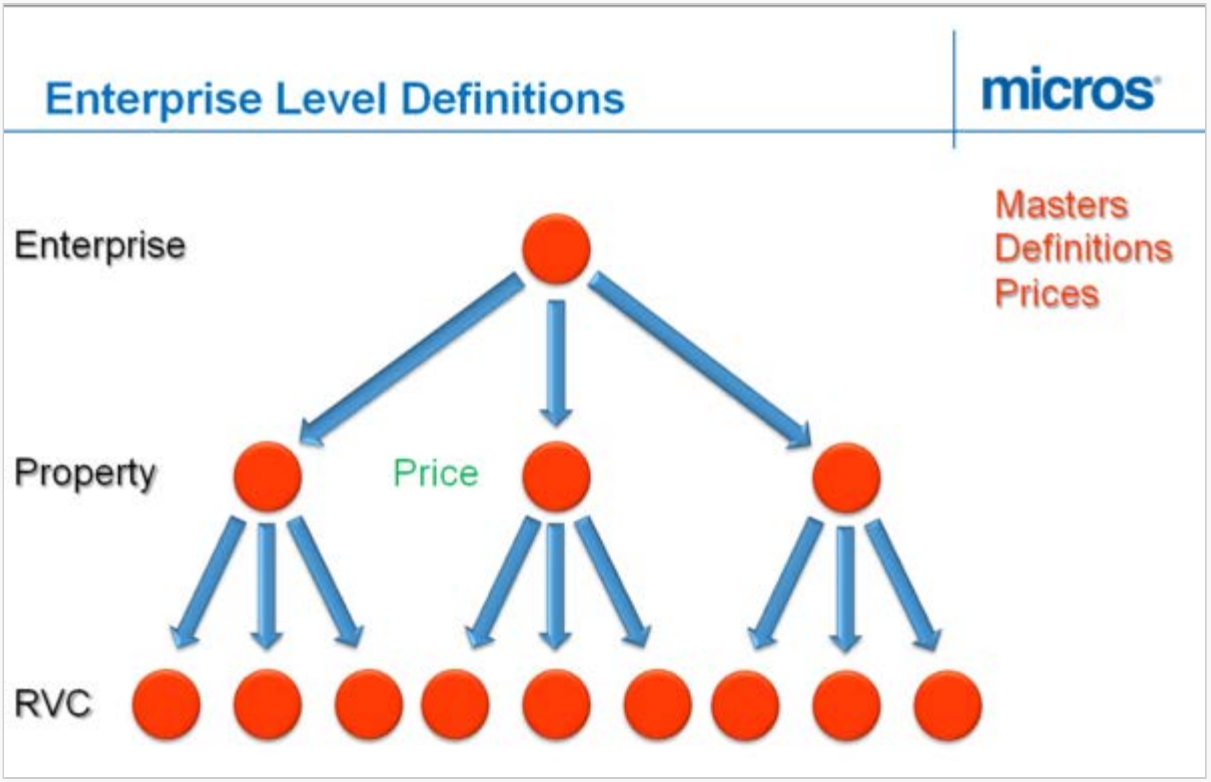
- Taxes can be catagorized by Country, State, County, City …
- Prices may be configured by Region, Tier, Property …
- Menu Item Definitions may be set up by Store Configuration

The following definitions may exist anywhere in the Zonal hierarchy;

- Menu Item Master
- Menu Item Definitions
- Menu Item Prices
- Taxes
- Discounts
- Pages (Workstation screens)
- Service Charges

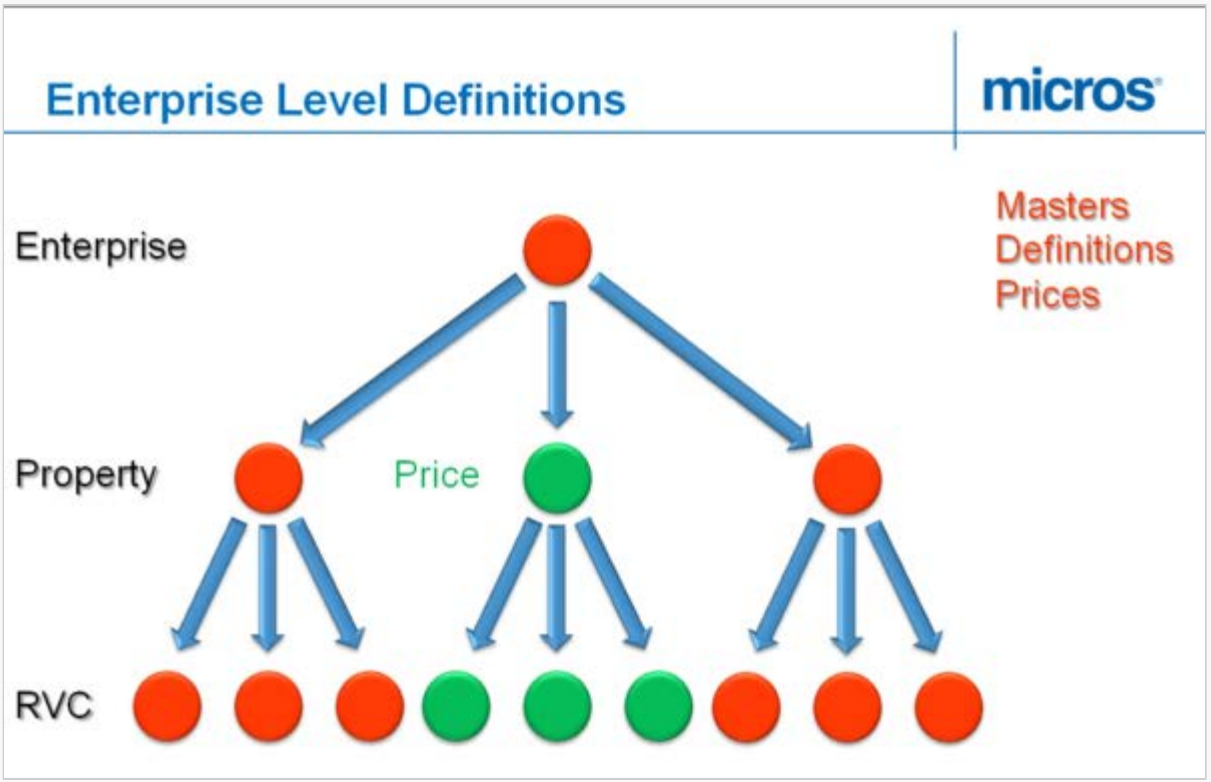
Illustrations

- For example, as shown here, Menu Item definitions (including MI Price definitions) may reside on the Enterprise level.



Definition record handling

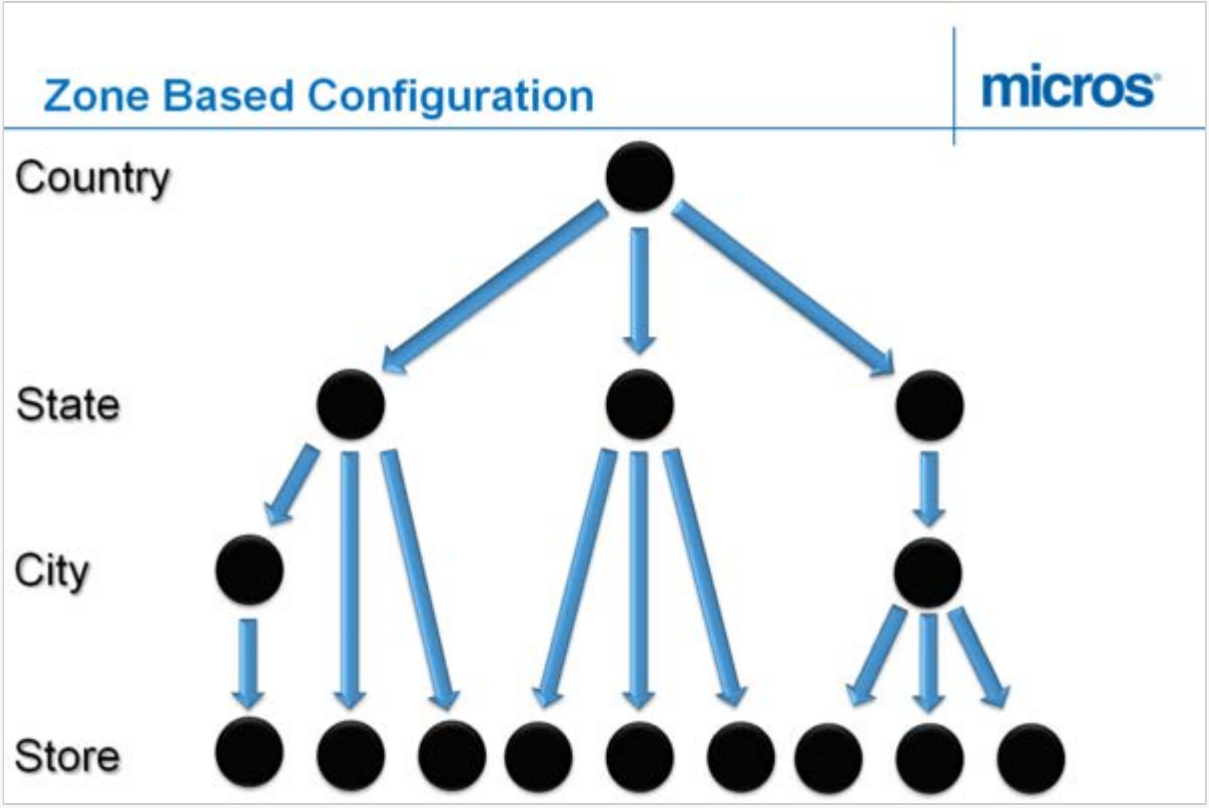
- MI Price changes for a specific Property may then be triggered from the Enterprise level



Definition updates

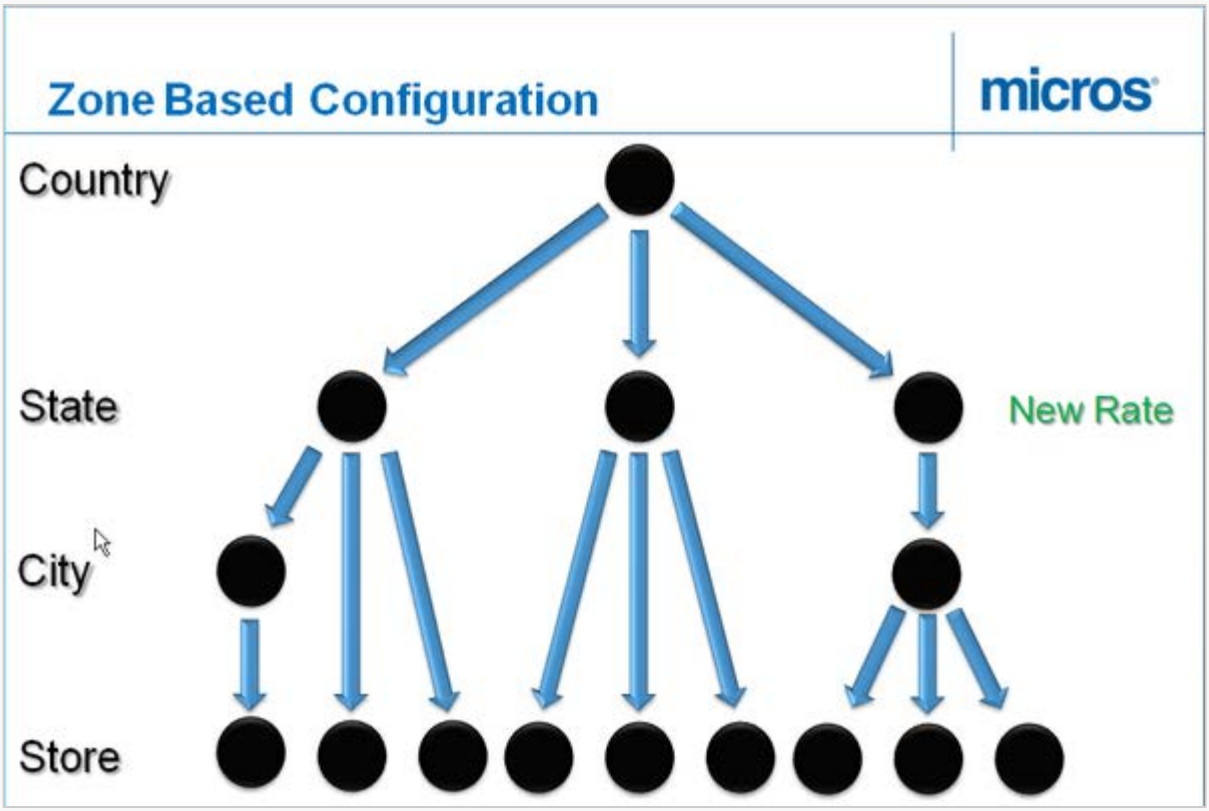
- With Enterprise definition handling, using the Zone

hierarchy allows for pinpoint updates.



Zone Configuration diagram

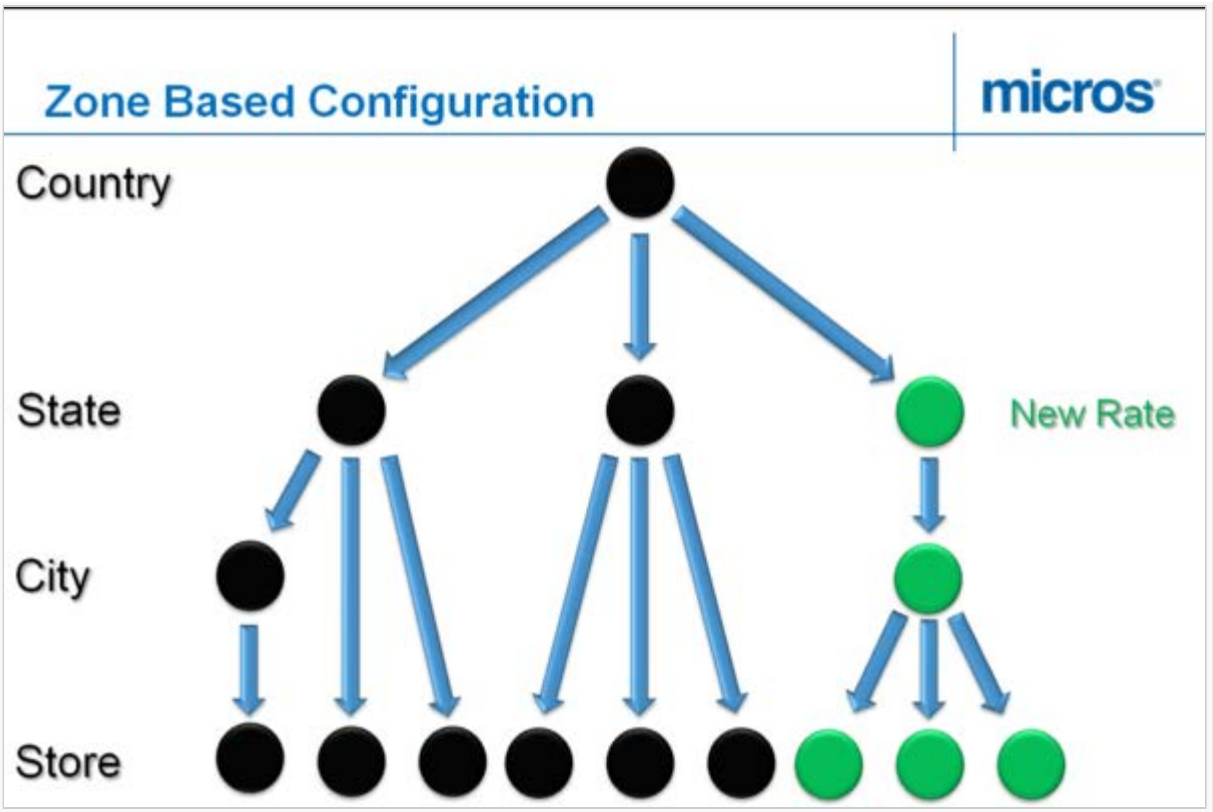
- If a new State Tax rate needs to change for a specific Property, this may be accomplished.



Zone Configuration diagram

- Definition updates may be

set up and scheduled to take effect on the desired date and time.



Zone Configuration diagram

Zone Configuration

The Zones Configuration module allows for the use of the following types of files.

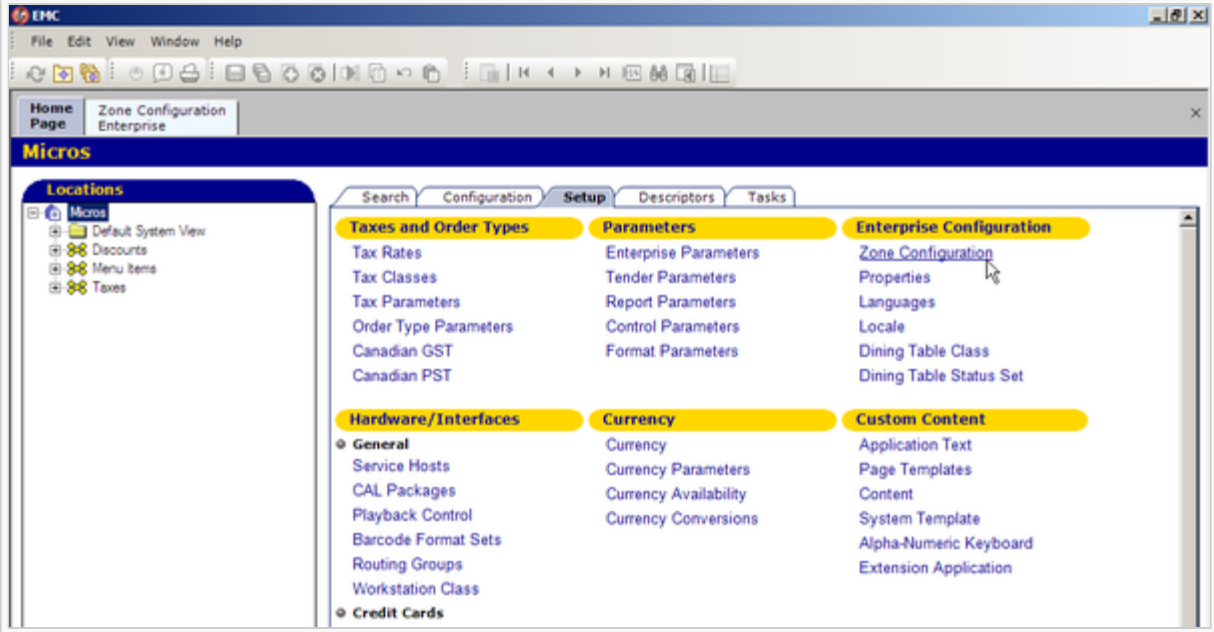
- Menu Items (i.e. Food & Alcohol)
- Tender Media
- Taxes
- Discounts
- Receipt Headers and Trailers

Some major considerations when configuring a Zonal hierarchy structure are as follows;

- What files will the Zone\s be modifying?
- What is going to have priority?
- What is going to be allowed to override?

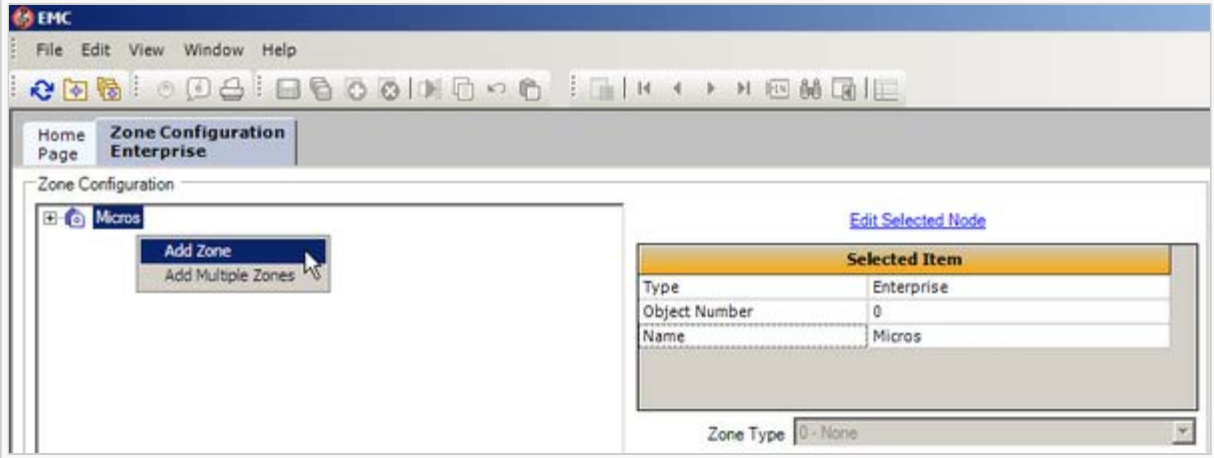
EMC Programming

From the Simphony EMC, access the Zone Configuration module as shown here.



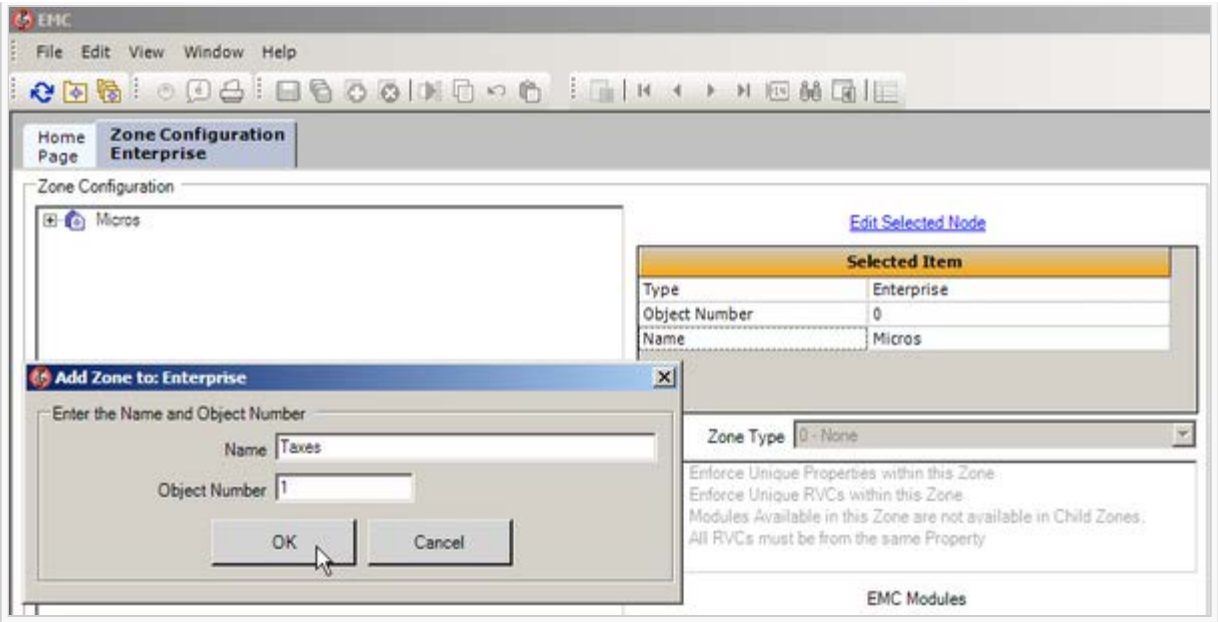
EMC-> Setup tab-> Enterprise Configuration-> Zone Configuration

Programmers may add Zones a couple of different ways; one at a time or Multiple Zones at once. This may be accomplished by opening the Zone Configuration file under the EMC's Enterprise Configuration header by right-clicking on the main Enterprise file.



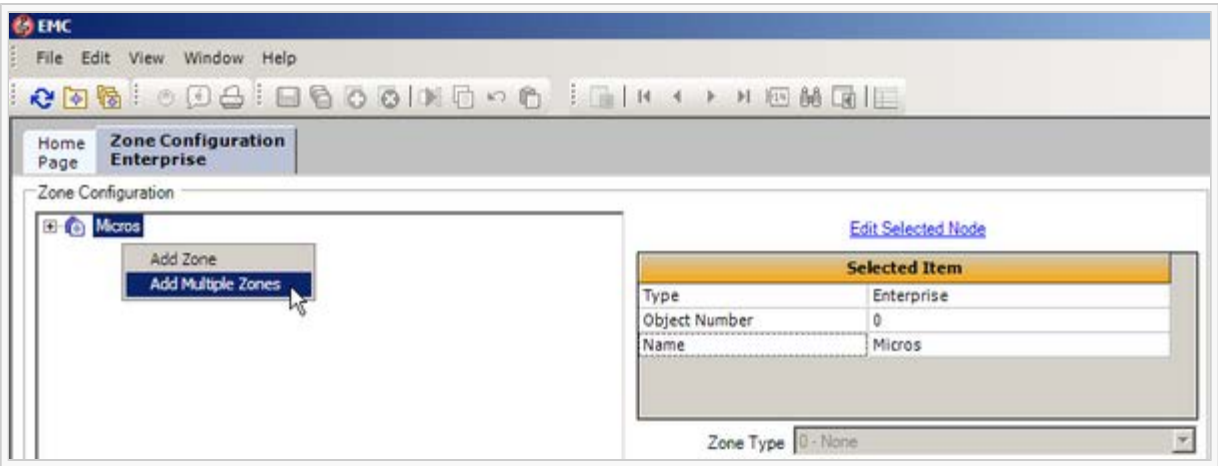
Zone Configuration - Enterprise module

- **Add Zone** – One at a time
- If the **Add Zone** option is selected, then the **Add Zone to: Enterprise** screen displays as shown below. A zone **Name** and **Object Number** (or record #) may be assigned here and then click the ***OK*** button.



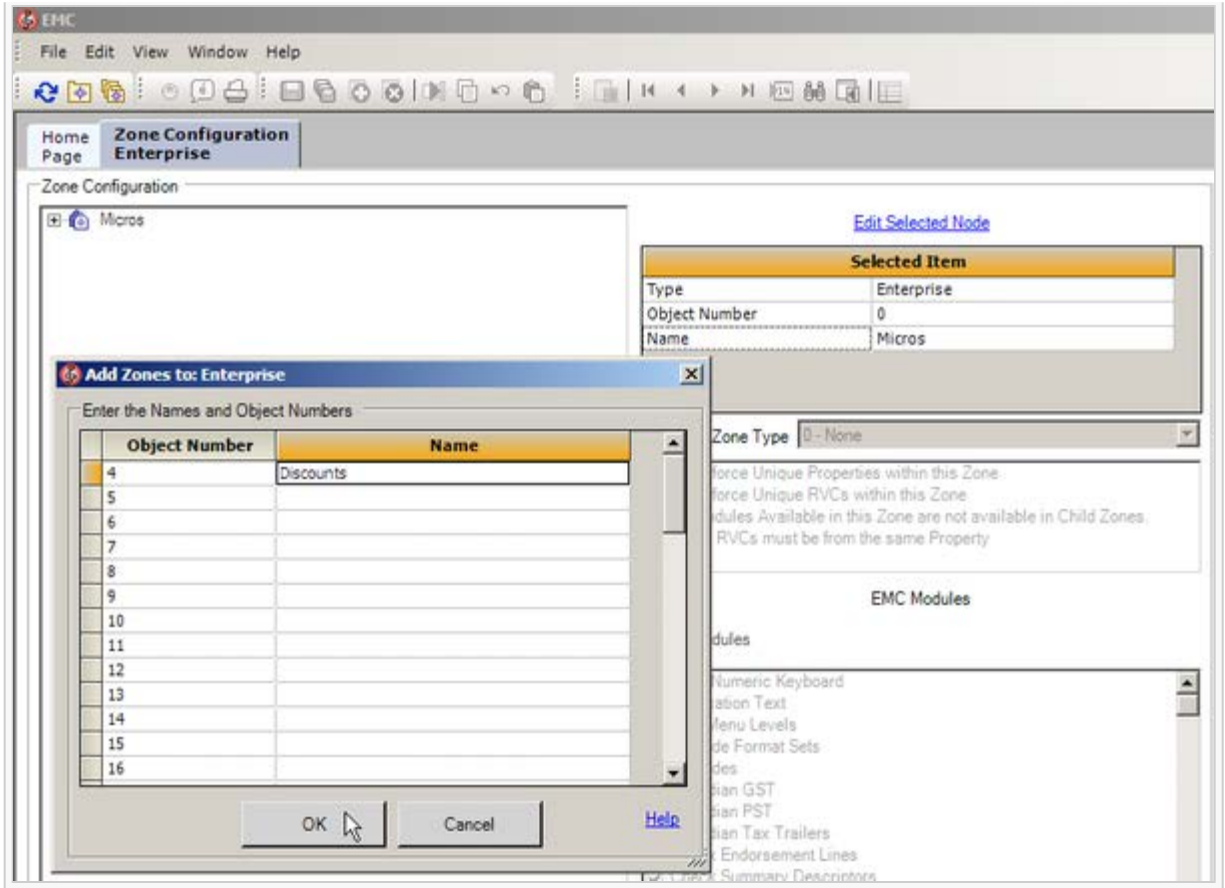
Zone Configuration - Enterprise module

- **Add Multiple Zones** – Add more than one Zone at a time



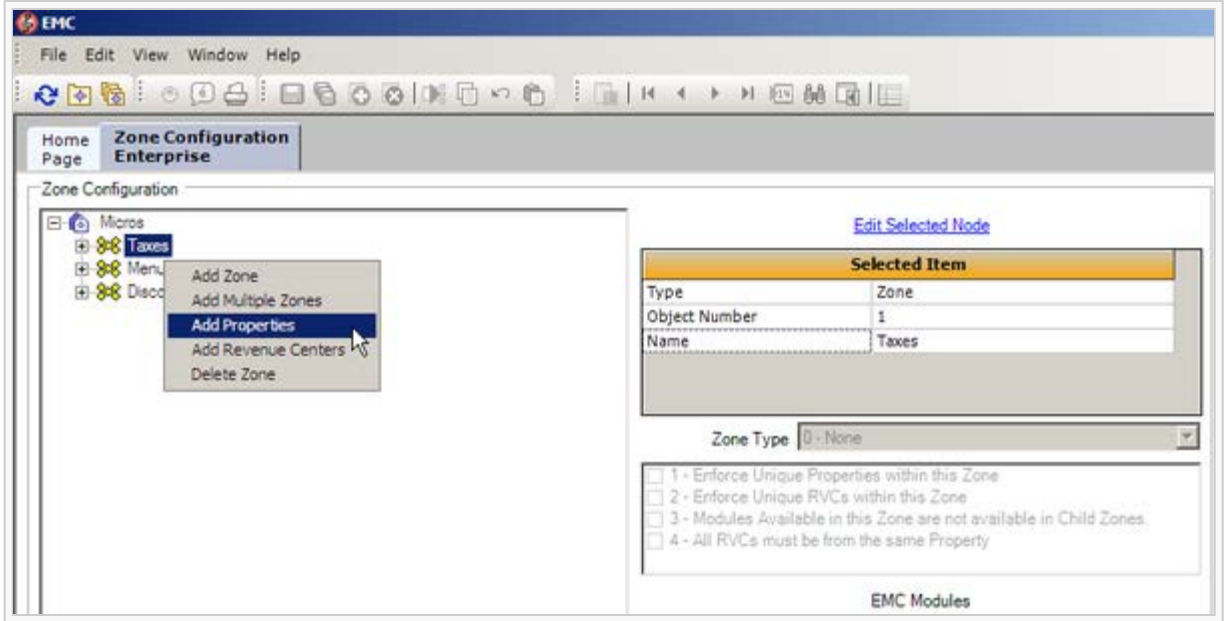
Zone Configuration - Enterprise module

- If the **Add Multiple Zones** option is selected, then the following screen displays in a list view in order to add more than one Zone. Once completed, click the ***OK*** button.



Zone Configuration - Enterprise module

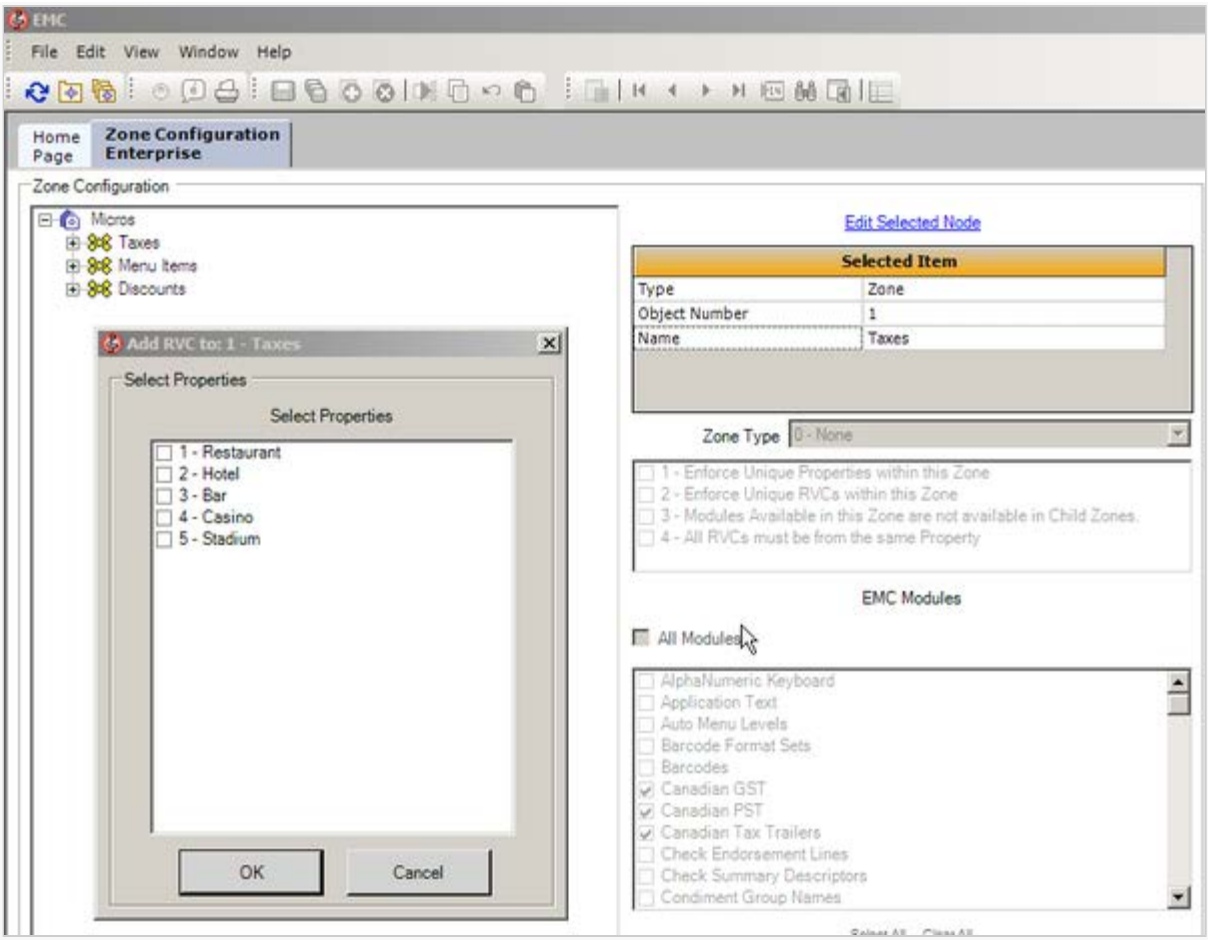
- Once The Zone Names and \or Object numbers have been added, a programmer may right-click on the Zone name and select the **Add Properties** option.



Zone Configuration - Enterprise module

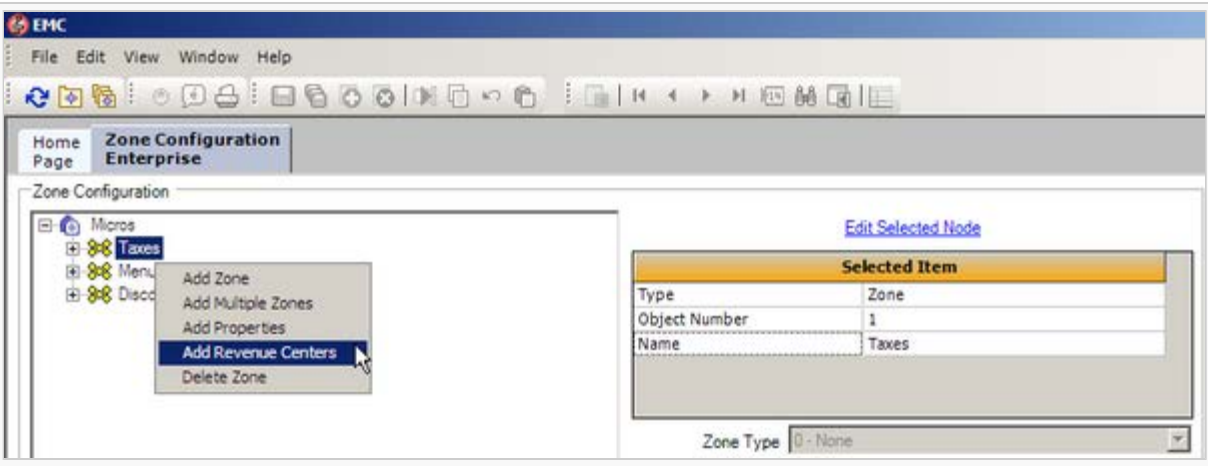
- Here's the **Select Properties** display. Simply select the checkbox next to each Property

that's to be associated with that particular Zone and once completed, click the ***OK*** button.



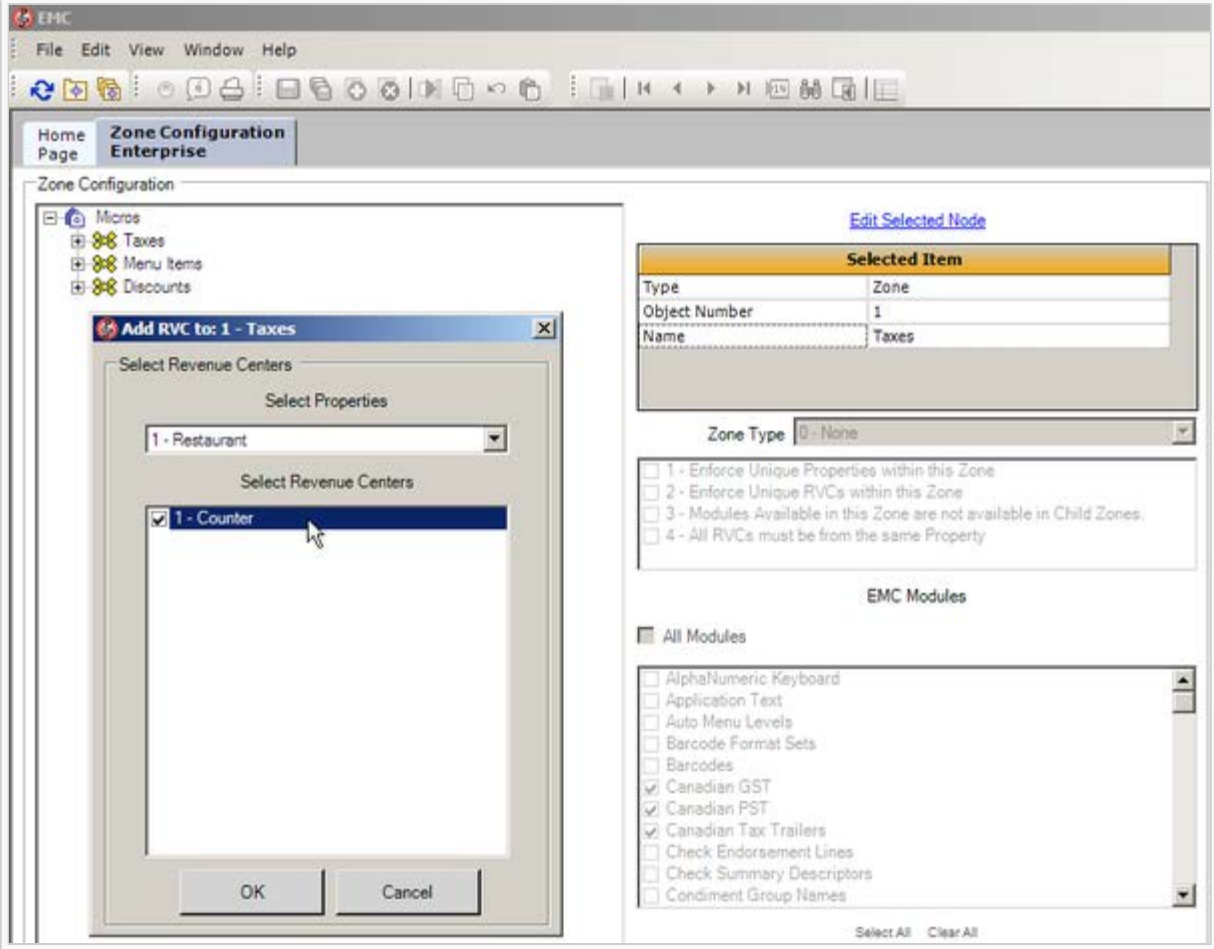
Zone Configuration - Enterprise module

- Here's the **Add Revenue Centers** option.



Zone Configuration - Enterprise module

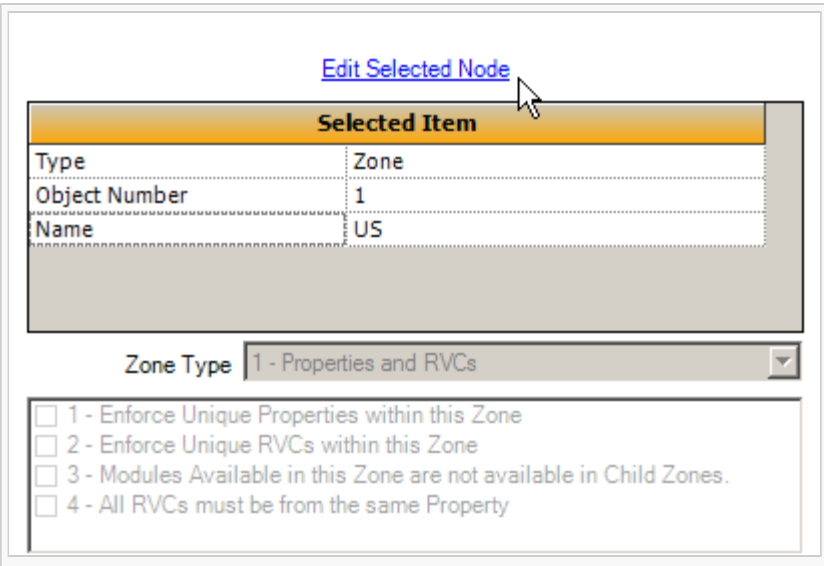
- Select a **Property** and then any desired **Revenue Center** associated with that Property and once completed, click the ***OK*** button.



Zone Configuration - Enterprise module

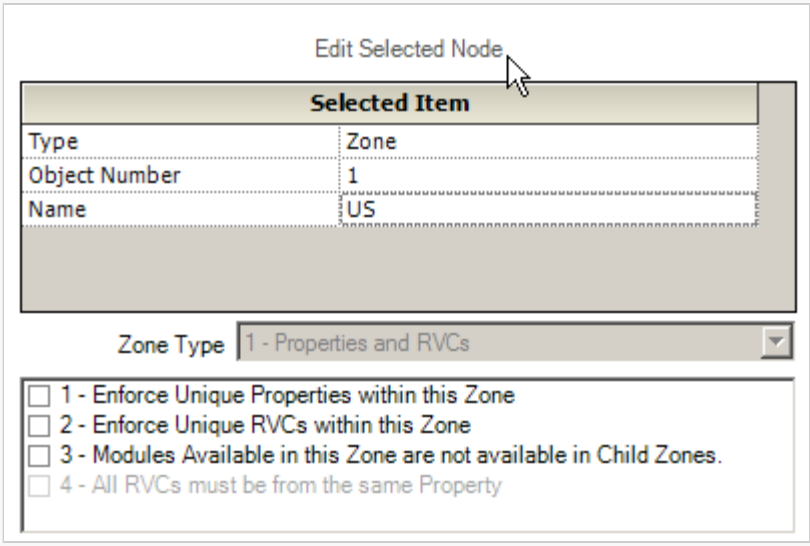
Zone Rule Configuration and Enforcement

- Once the Zones and Properties and RVC's have been added, programmers may click on the **Edit Selected Node** link to further define and establish Enforcement rules which may help prevent record collisions and unwanted updates to incorrect locations.



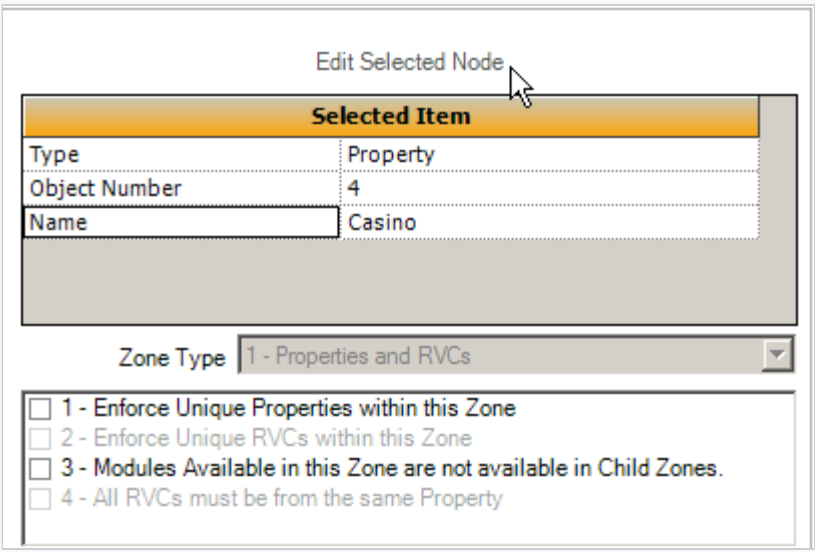
Zone Configuration - Edit Selected Node

- Note the choices of the rule enforcing options are based on the **Zone Type** selection (i.e. Zone, Property or RVC). The options shown below are available when editing the **Zone** Type.

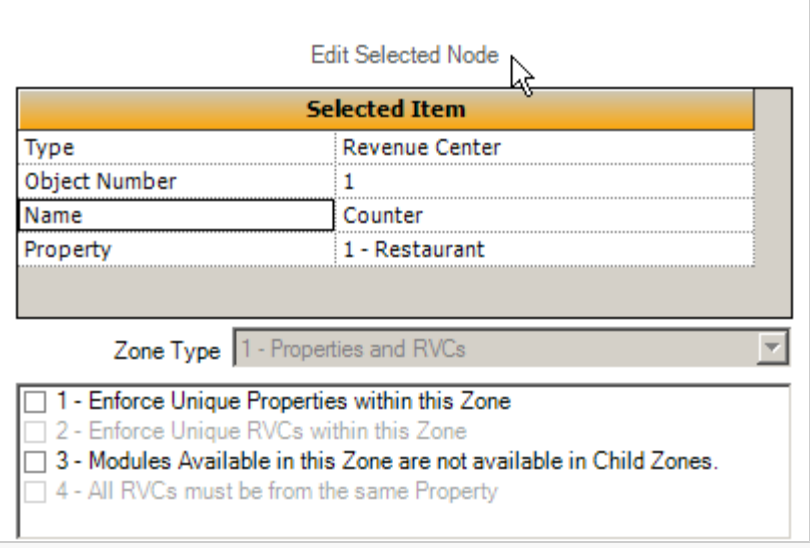


Zone Configuration - Edit Selected Node - Enforcing options for Zone Type

- The rule enforcing options shown here are available when editing either the **Property** or **Revenue Center** Types. These options ensure the validation of Property and RVC naming conventions to be unique and the exclusion handling of Child RVC's.

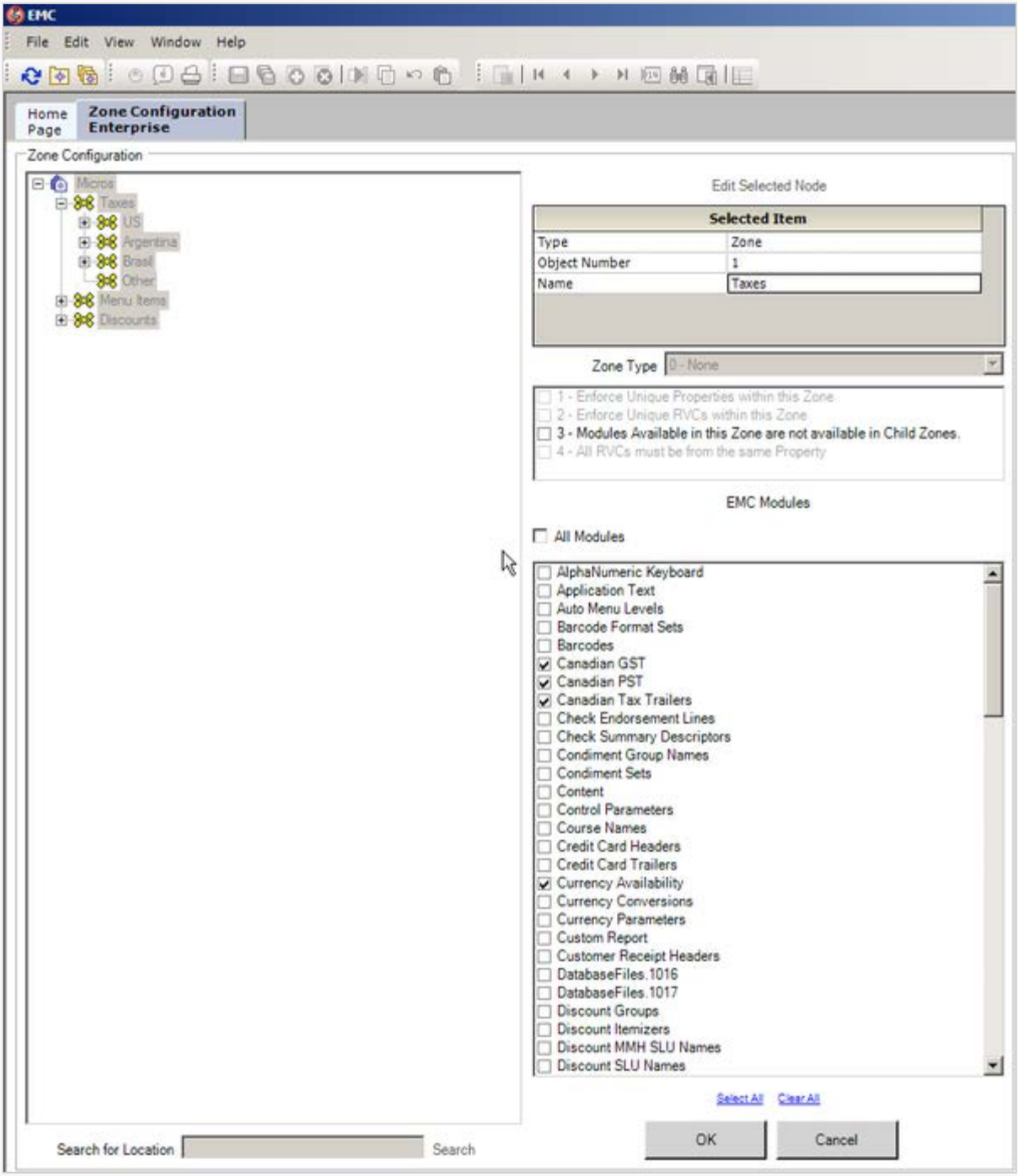


Zone Configuration - Edit Selected Node - Property Type

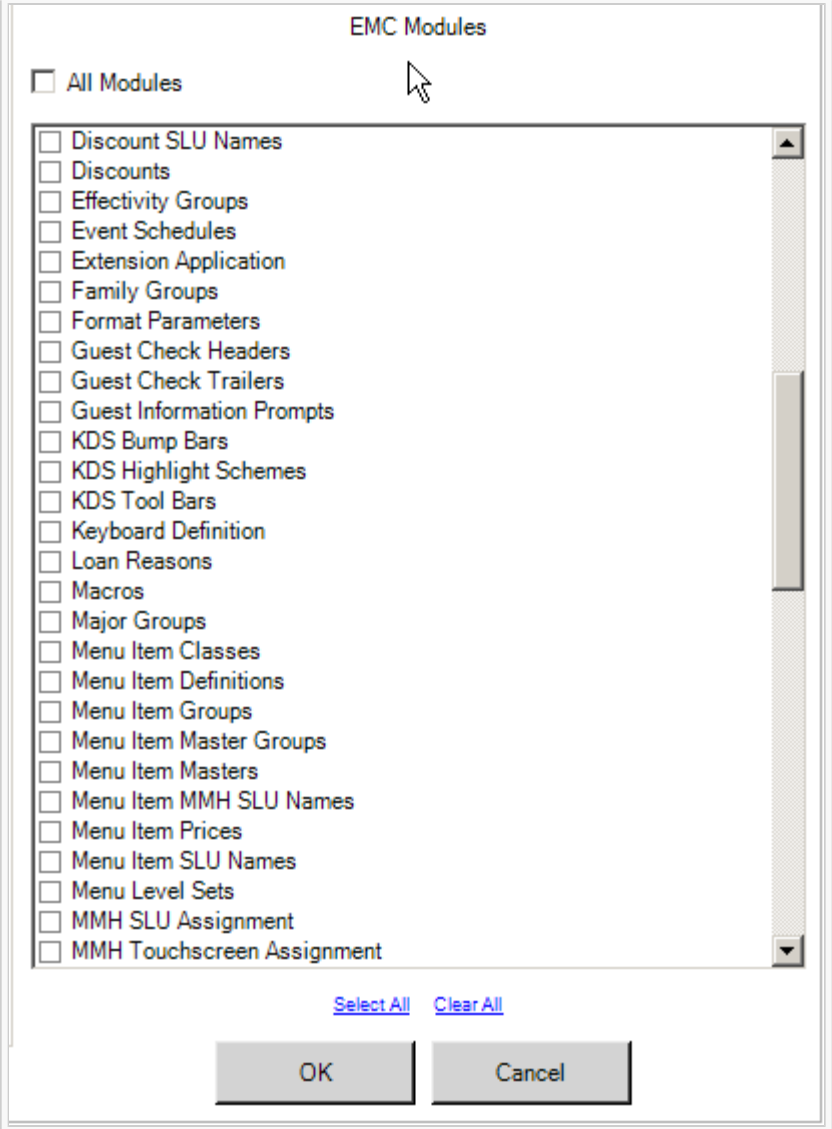


Zone Configuration - Edit Selected Node - RVC Type

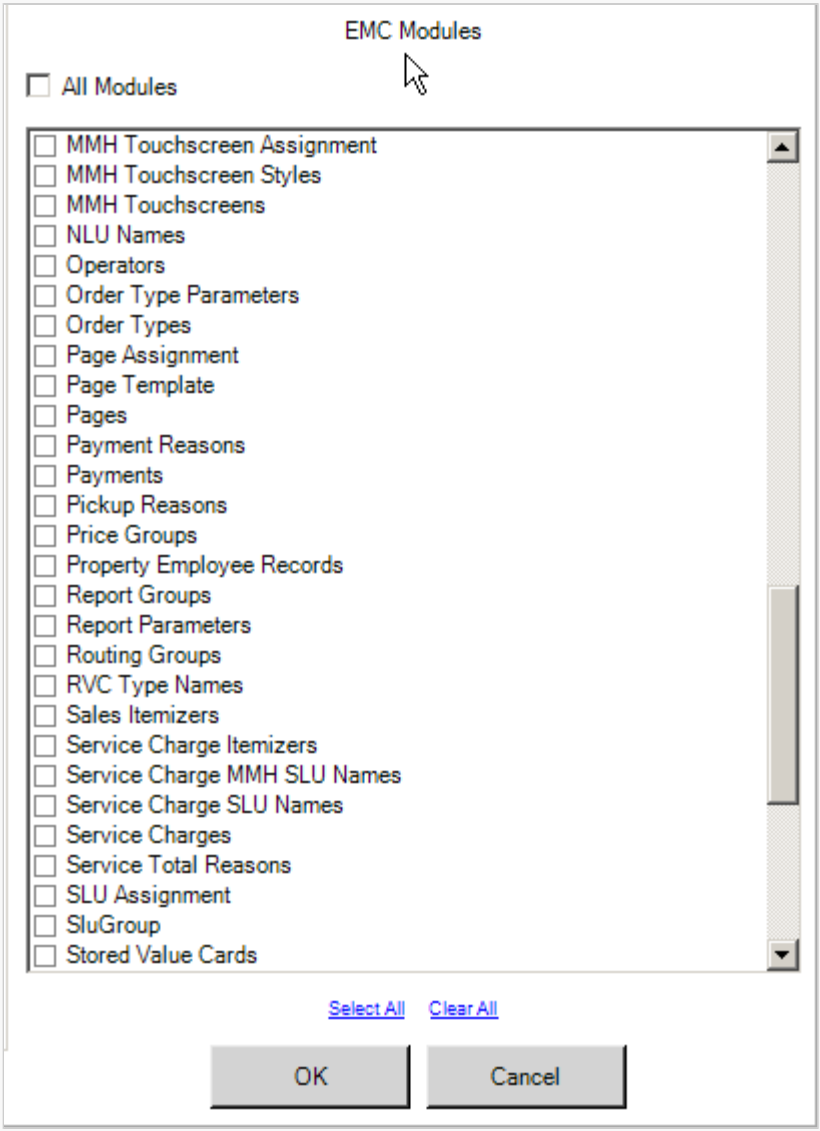
- Many Simphony modules may also be identified and earmarked for access for possible Property or RVC updates from the Enterprise level depending on the actual purpose of the Zone. All of the remaining accessible EMC modules are listed below and on following pages. The example shown below is displaying EMC Modules that are enabled to allow access for a **Taxes** Zone.



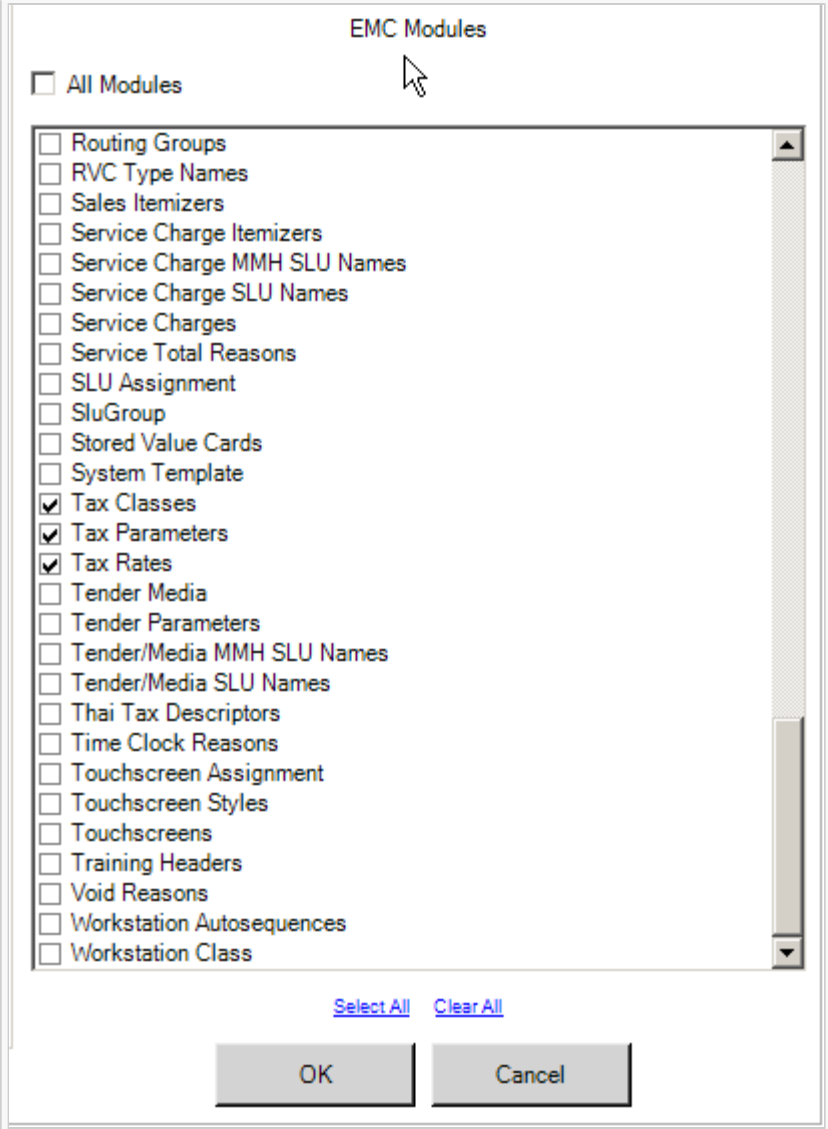
Zone Configuration - Edit Selected Node - Taxes Zone-> EMC Modules access



Zone Configuration - Edit Selected Node - Taxes Zone-> EMC Modules access



Zone Configuration - Edit Selected Node - Taxes Zone-> EMC Modules access

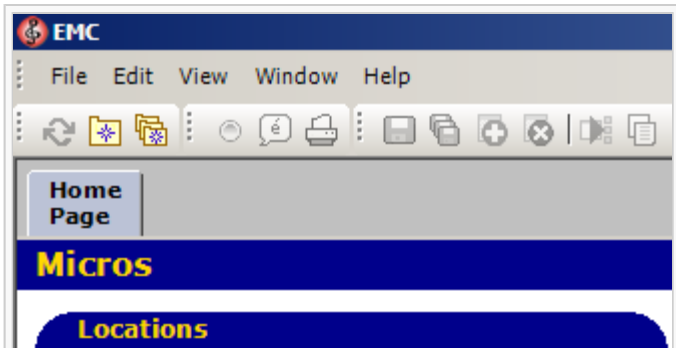


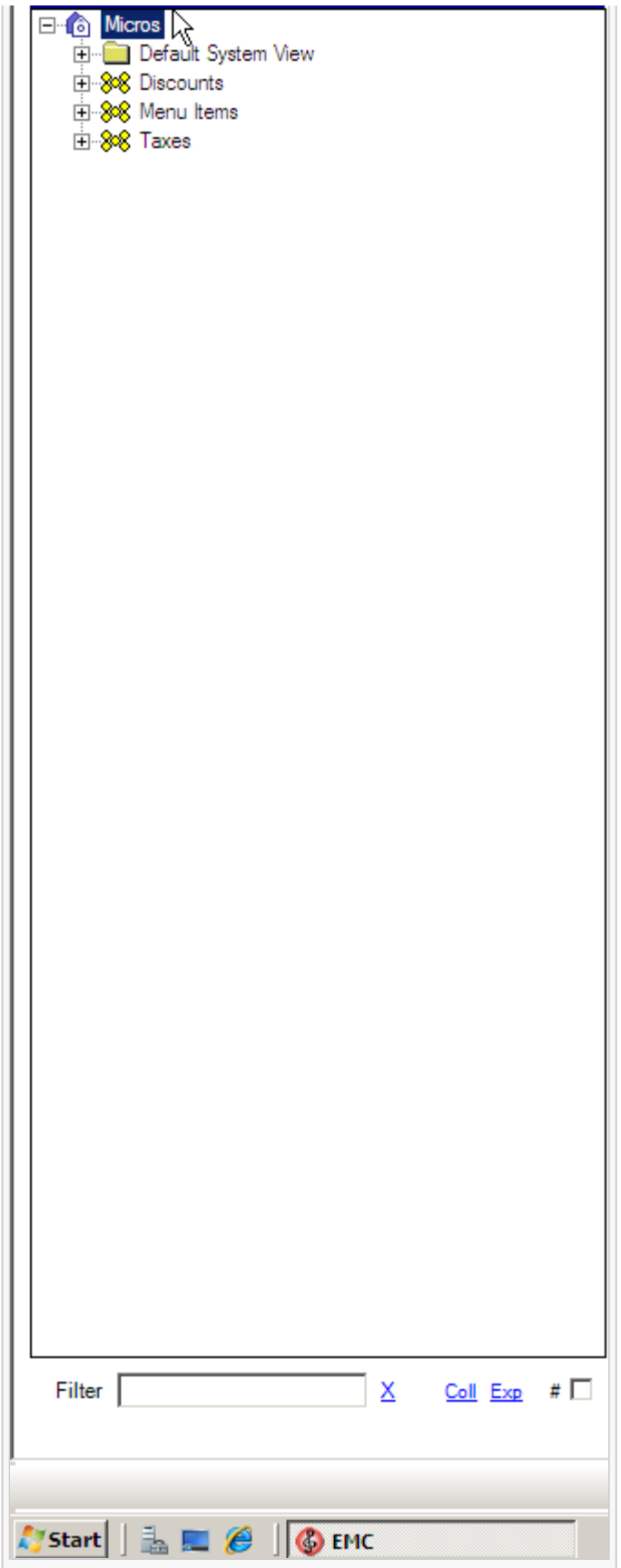
Zone Configuration - Edit Selected Node - Taxes Zone-> EMC Modules access

EMC Zone Navigation\Filtering

Once Zones have been established, the Zones will display on the EMC's Home page in alphabetical order in a descending fashion as will the Properties and RVC's associated with them. Click on the plus sign symbols next to the names to further expand the view.

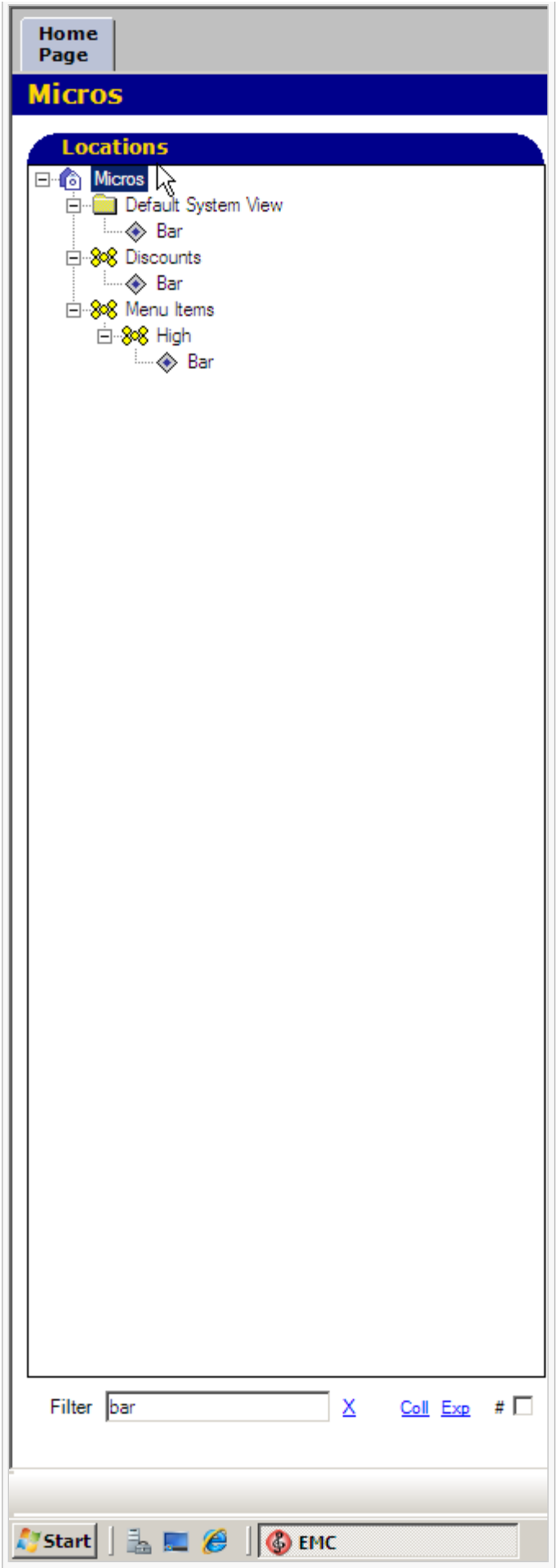
- The Zone Configuration also allows for the filtering of Locations as viewed on the EMC's Home Page.





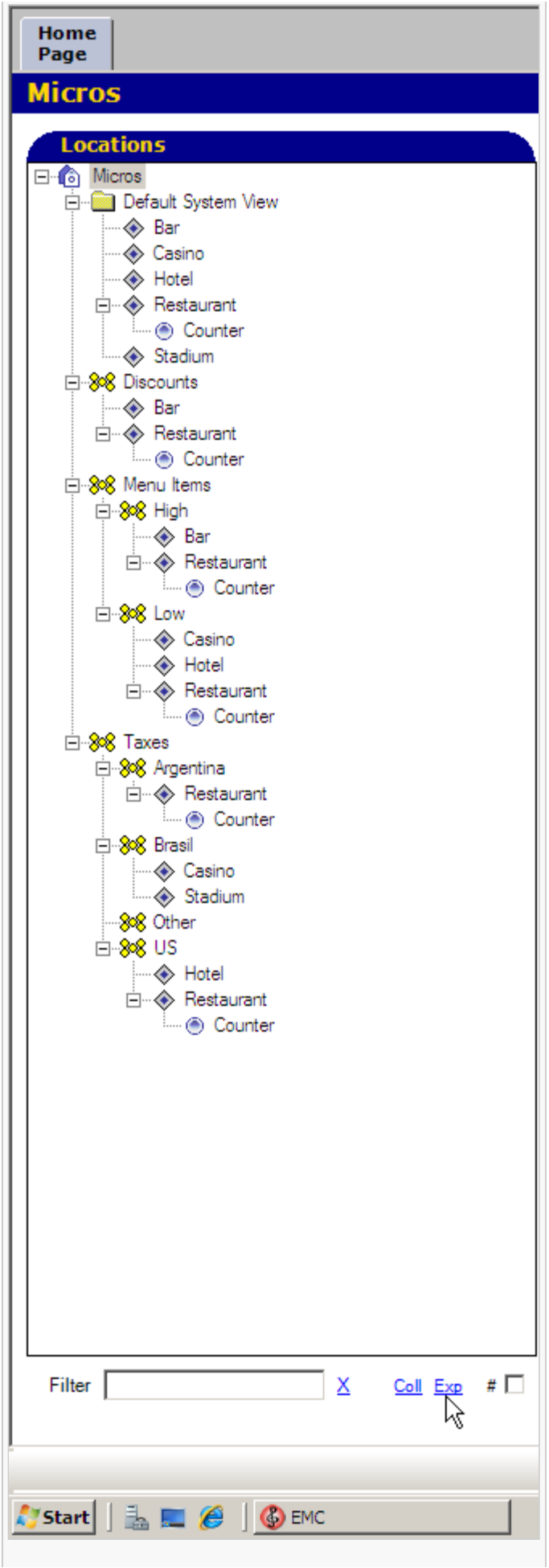
EMC Home Page Zones View

- Simply type text within the **Filter** field and the Locations field will display all of the Zones, Properties and RVC's that contain that text. The word **bar** was typed here.



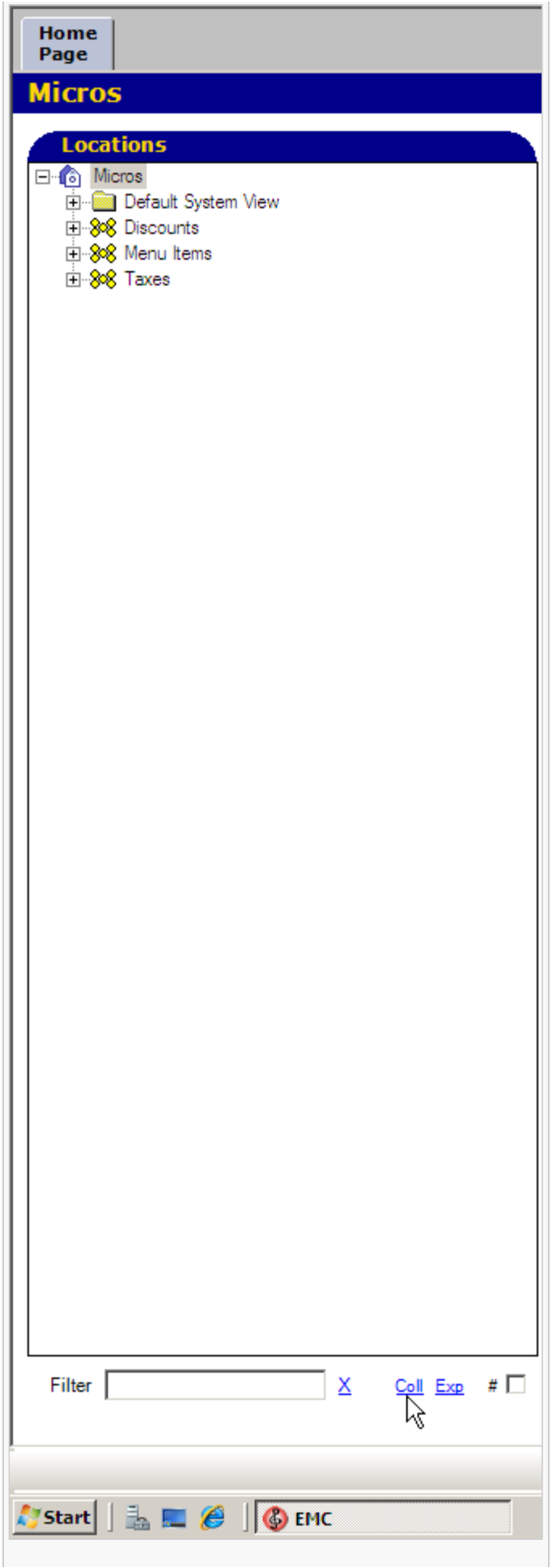
EMC Home Page Zones Filtering

- It’s also possible to completely expand the Zones view using the **Exp** (for Expand) link as shown here.


Home Page
Micros
Locations
Micros
Default System View
Bar
Casino
Hotel
Restaurant
Counter
Stadium
Discounts
Bar
Restaurant
Counter
Menu Items
High
Bar
Restaurant
Counter
Low
Casino
Hotel
Restaurant
Counter
Taxes
Argentina
Restaurant
Counter
Brasil
Casino
Stadium
Other
US
Hotel
Restaurant
Counter
Filter
X
Coll
Exp
#
Start
EMC

EMC Home Page Zones Expanded view

- The collapse of the Zones view may be accomplished by clicking on the **Coll** (for Collapse) link.


Home Page
Micros
Locations
Micros
Default System View
Discounts
Menu Items
Taxes
Filter
X
Coll
Exp
#
Start
EMC

EMC Home Page Zones Collapsed view

Conclusion

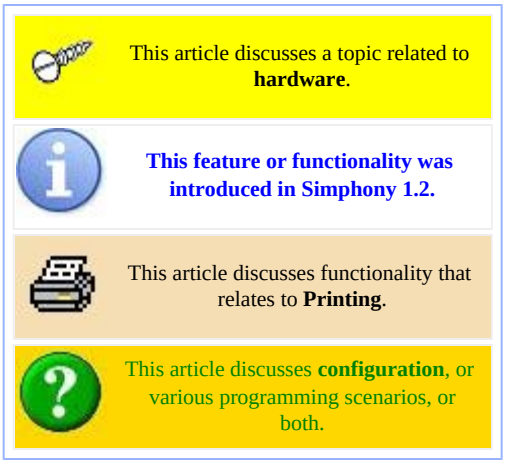
The use of Zones to organize and establish structure within an Enterprise environment may prove to be invaluable in saving time with Definition handling and updates throughout the entire system. Configuring Zones effectively allows privileged users to view and navigate the entire Enterprise from within the EMC in a more logical manner. Depending on the purpose of the Zone, a quick and accurate ‘picture’ is accessible in reference to what locations would be affected by any potential changes or updates. Finally, the system displays flexibility in allowing definitions to be overridden on both the Property and RVC level.

See also

- Inheritance and Overrides
- List of EMC Record Types

Slip Printer

A **Slip Printer** is a printer that does not contain paper; the user must add a piece of paper (or slip) per print job. Slip Printers are generally used by customers who use their own stationery (often containing a company logo or other similar artwork) for guest checks and receipts, and they are also used for Check Endorsement Printing. The "slips" that are used by these printers are often called "hard checks", because they are often made of card stock. All printers are either Slip Printers or Roll Printers; Slip Printers are generally the lesser-used printer type of the two.



Contents

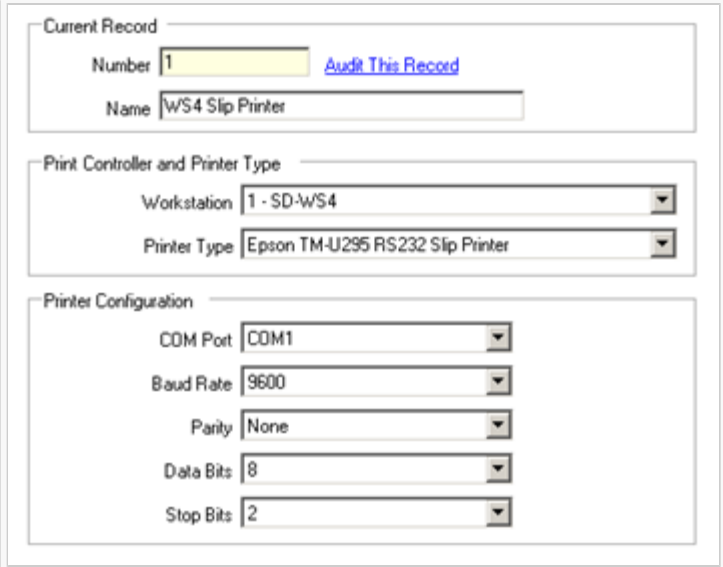
- 1 EMC Configuration
  - 1.1 Printers
  - 1.2 Workstations
    - 1.2.1 Backup Printing
  - 1.3 RVC Parameters
  - 1.4 Sample Configuration
- 2 Hardware Configuration
  - 2.1 Supported BIOS
  - 2.2 Diagnostics
- 3 Workstation Operations
  - 3.1 Check Endorsement Printing
  - 3.2 By-Round Operations
- 4 Operational Considerations
  - 4.1 Printing Multiple Pages
  - 4.2 Multiple Print Jobs
- 5 See also

EMC Configuration

Slip Printers are primarily configured in three EMC modules: Printers, Workstations, and Revenue Center Parameters.

Printers

In the Printers module, a programmer determines that a printer is a Slip Printer by setting the Printer Type to **Epson TM-U295 RS232 Slip Printer**. MICROS recommends keeping the



This image displays the default settings for the Epson TM-U295 RS232 Slip Printer. (MICROS recommends keeping these settings.)

default Printer Configuration settings. The workstation drop-down determines the workstation (technically the Print Controller) for the printer. This is the workstation that is physically connected to the printer.

Workstations

In the Workstations module (see Workstations: Printers Tab for more information), each print job type can be configured to print. Slip Printers are most commonly used for printing Guest Checks, Check Endorsements, Customer Receipts, and Memo Checks. Although Slip Printers are not typically used for other print jobs, it is possible to send Credit Card Voucher, PMC Report, and Validation Chit print jobs to Slip Printers as well. Employee Time Chits, Employee Time Cards, and Local Order Receipts cannot be printed on Slip Printers; EMC will prevent this configuration.

The **Epson TM-U295 RS232 Slip Printer**.

Backup Printing

The following rules have been implemented for programming the Backup Printer of a workstation:

- A Slip Printer can only backup a Slip Printer.
- A Roll Printer can only backup a Roll Printer.

Because backup printers can only backup devices of the same type, a programmer should use careful consideration when configuring a workstation that is programmed with some print jobs to print to a Slip Printer while others print to a Roll Printer. For example, if a Roll Printer is used for PMC Reports but Guest Checks and Customer Receipts are programmed to print to a Slip Printer, it is probably desirable that the backup printer is a Slip Printer. With this configuration, the Guest Checks and Customer Receipts will back up to the designated backup Slip Printer, while PMC Reports will not be backed up (they will simply fail if the primary printer is unavailable).

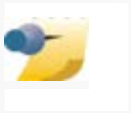
Similarly, the backup-of-the-backup printer does not function for workstations where the Guest Check Priner is a Slip Printer. Because all Order Device printers are Roll Printers, it is not possible to print failed Order Chits to a Guest Check Slip Printer.

RVC Parameters

Within Revenue Center Parameters, the Format Tab contains a number of settings and options that pertain to Slip Printer programming. In the Print Output group box, the following fields are configurable:

Lines on First Page
: Enter the maximum number of lines to print on the first page of the guest check before prompting for a new check to be inserted. This field and "Lines on Other Pages" *must* have non-zero values configured for Slip Printing configurations. To avoid printing errors, this value should not exceed the physical size of the paper. If the value is non-zero, "Lines on Other Pages" should also be non-zero; failure to observe this rule will result in unexpected results.

Lines on Other Pages
: Enter the maximum number of lines to print on successive pages of the guest check before prompting for a new check to be inserted. This field and "Lines on First Page" *must* have non-zero values configured for Slip Printing configurations. To avoid printing errors, this value should not exceed the physical size of the paper.



In a nutshell:

- **Lines on First Page** controls where the first page's printing will *end*.
- **Lines on Other Pages** controls where all other pages' printing will *end*.
- **Line Feeds Before First Page** controls where the first page's printing will *start*.
- **Line Feeds Before Other Pages** controls where all other pages' printing will *start*.

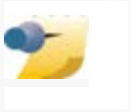
The "Line Feed" settings are ignored for printing Check Endorsements.

Line Feeds Before First Page
: Enter the number of lines to advance before printing the guest check header. This feature may be used to prevent overprinting a logo on preprinted checks. NOTE: The line feeds configured here are included in the number configured for the "Lines on First Page" field. For example, if this field is set to 5 and "Lines on First Page" is set to 30, the first page will have 25 lines of text.

Line Feeds Before Other Pages
: Enter the number of lines to advance before printing begins on the next successive page. NOTE: The line feeds configured here are included in the number configured for the "Lines on Other Pages" field. For example, if this field is set to 5 and "Lines on Other Pages" is set to 30, the pages will have 25 lines of text.

Sample Configuration

Because each site may have different slips with different layouts/logos, there is not a single setting that works for all environments. However, the following settings tend to be a good starting point for a site using Slip Printers:



An 8.5" (21.59cm) form can print about 38 lines.

- Lines on First Page: 35
- Lines on Other Pages: 35
- Line Feeds Before First Page: 5
- Line Feeds Before Other Pages: 5

Hardware Configuration

Supported BIOS

Currently, Simphony supports only the

Model:	Epson TM-U295 RS232
Supported Versions:	3.02 ESC/POS
Website:	Epson TM-U295 RS232 (http://pos.epson.com/products/TM-U295.htm)
Introduced:	Simphony 1.2

Epson TM-U295 RS232 Slip Printer, with BIOS Version 3.02 ESC/POS. To verify the BIOS version, follow these steps:

1. With the Slip Printer powered off, set DIP switch 3 to the ON position and leave all others OFF
2. Hold down the RELEASE button while you turn on the printer.
3. Release the RELEASE button.
4. The printer is now in the slip paper standby state.
5. Insert a sheet of slip paper.
6. The printer prints the current settings and ejects the slip paper
7. Press the RELEASE button again.
8. Insert another sheet of slip paper and the printer will print characters from its character sets.
9. During the self test, the printer will stop whenever it is out of paper.
10. When this happens, press the RELEASE button and insert another sheet of slip paper.
11. Continue this process until the printer indicates the end of the self test; this is generally four slips.

```
Version 3.02 ESC/POS

Serial Interface
     Baud Rate     : 9600 bps
     Data Bits     : 8 bits
     Parity        : none
     Stop Bits     : 1 bit or more
     Handshaking   : XON/XOFF
     Receive Error: print '?'

Buffer Capacity
     512 bytes
```

These are the expected settings for a BIOS printout.

Diagnostics

The configuration of Slip Printers can be tested by using PMC Diagnostics.

Workstation Operations

Check Endorsement Printing

See also, Check Endorsement Lines

Although Slip Printers are not used as frequently as Roll Printers, Slip Printers are the only printer type that support **Check Endorsement Printing**. Check Endorsement Printing is used to print an endorsement (the "signature" of the business) of a personal check; the printer will print the Check Endorsement Lines when the Tender/Media's option bit, **[25 - Endorsement Required]**, is enabled.

The Check Endorsement print job always prints before a Guest Check or Customer Receipt. See below for important considerations when multiple print jobs are sent to a Slip Printer.

By-Round Operations

Slip Printers are often used with operators configured as "By-Round". When an operator is a By-Round Operator, the Guest Check will print each round. In addition, the system will continue each round's printing from the location where the previous round's printing ended. For more information, see By-Round Guest Check.

Operational Considerations

Printing Multiple Pages

When a Guest Check or Customer Receipt spans multiple pages, the workstation will prompt the user to insert a continuation page; the user prompt is: **`Insert Continuation`**. After the user inserts the new chit and presses the Retry button on the workstation, the printer will begin by first printing the header followed by all the check detail items.

Multiple Print Jobs

Four print jobs always print before a Guest Check or Customer Receipt: Check Endorsement Printing, Validation Chits, Tax Exempt Vouchers, and Credit Card Vouchers. If a Slip Printer is being used to print these items, an operator will need to use caution so that the check or receipt slip is not inserted accidentally when the printer is attempting to print something else. If an operator does accidentally insert the Guest Check slip, it is possible for the items on the check to be overwritten with the information from the other print job.

For example, when a Tender Media record with "Endorsement Required" is selected, the printer will first expect the Operator to insert the Personal Check for endorsement. After the endorsement print job is complete, the user will be presented with the following user prompt **`Remove Previous Slip`**. At this time, the Operator should remove the Personal Check, insert the Guest Check slip and press Retry.

If multiple print jobs need to print, they print in the following order:

1. Credit Card Voucher
2. Validation Chits (Tender, MI Class, Service Charge, or Discount)
3. Check Endorsement
4. Employee Discount Voucher and/or Employee Meal Voucher
5. Tax Exempt Voucher
6. Guest Check (or Customer Receipt or Memo Check)
7. Order Chits

See also

- By-Round Guest Check
- EPSON.com: TM-U295 (http://pos.epson.com/products/TM-U295.htm)

Printing (Hardware)	Printing · Printers (EMC Module) · Bluetooth Printing · IP Printer · Order Device · Print Controller · Roll Printer · **Slip Printer** · Hardware Specs
Learning series: Printing	

Start of Day (RVC SOD)

This article is about Start of Day RVC Overrides. For general information about Start of Day, see Start of Day. For information about RVC Employee Shifts, see Employee Shifts

Start of Day is the process that increments a business day. Generally, Start of Day is programmed for a Property, and all Revenue Centers in a property start the new business day at the same time. It is possible, however, to configure the **Revenue Center to override the Property Start of Day** times. This article discusses the RVC override configuration and usage.

This article discusses **configuration**, or various programming scenarios, or both.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Usage
  - 1.1 Example
- 2 EMC Configuration

Usage

There are a number of reasons why a Revenue Center might need a different Start of Day time than the property, but here are a couple common examples:

- In a large hotel or casino, some RVCs might have a shift change earlier than the property's Start of Day time. For these RVCs, it may be more logical to program the SOD at the same time as the shift change.
- One or more RVCs might be leased outlets. It is possible that the leasing company has different requirements for Start of Day.

Example

In this example, consider a 24-hour environment such as a casino. At a site like this, most of the restaurants and other Revenue Centers are probably open during "regular" business hours (4pm - midnight or so), whereas the Service Bar Revenue Centers are open all 24 hours. Here is a typical scenario for using this option:

- Property SOD time is 6am. A site may choose this because:
  - This is when the first RVCs open (coffee shops, cafes, etc.)
  - This corresponds to their PMS start of Business Day time.
- The Service Bar for the poker tables is open 24 hours.
- The Service Bar "late shift" for its operators starts at 2am.

In this example, because a "day" for the Service Bar begins at 2am, the site may configure their system to **Override System Start of Day Times** for this Revenue Center.

EMC Configuration

If a site is using this RVC SOD feature, the configuration should be where any RVCs configured to override should be *before* the Property SOD time.

Consider the **Correct Configuration**:

- Property SOD time: 6am
- RVC SOD time: 3am
- Today is the 17th

At 6:00am, reports taken for "Yesterday" show:

- Property Reports show "Yesterday" as 6am on the 16th to 6am on the 17th (just a few minutes ago)
- Revenue Center Reports show "Yesterday" as 6am on the 16th to 6am on the 17th (just a few minutes ago)
- Reports for this RVC, with the override time of 3am, show "Yesterday" as 3am on the 16th to 3am on the 17th (a few hours ago).

Consider the **Incorrect Configuration**:

- Property SOD time: 6am
- RVC SOD time: 7am
- Today is the 17th

At 6:00am, reports taken for "Yesterday" show:

- Property Reports show "Yesterday" as 6am on the 16th to 6am on the 17th (just a few minutes ago)
- Revenue Center Reports show "Yesterday" as 6am on the 16th to 6am on the 17th (just a few minutes ago)
- Reports for this RVC, with the override time of 7am, show "Yesterday" as 7am on the 15th to 7am on the 16th!! Because it isn't 7am yet, "Yesterday" is almost a full day behind for this RVC. Therefore, this configuration is incorrect.

Start of Day (technical)

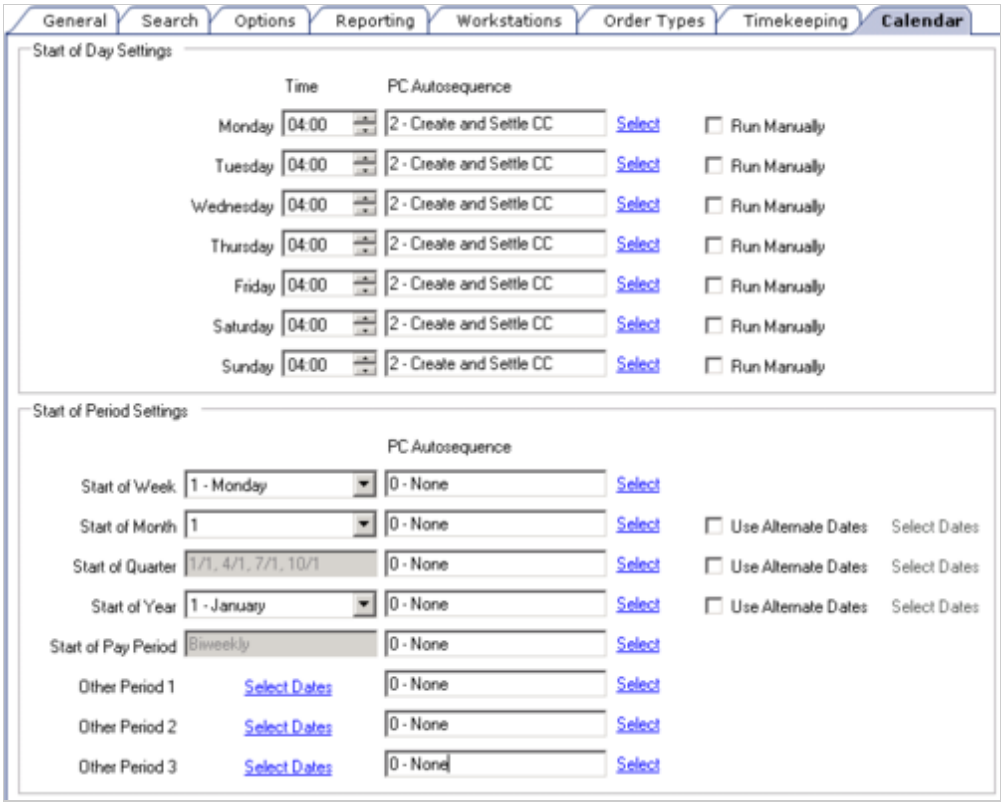
This article discusses the events that occur when a business day is incremented via the **Start of Day** process. This technical discussion may not be intended for all readers.

This article discusses a **technical topic** that is not intended for all readers.

Contents

- 1 Events
  - 1.1 Database Events
  - 1.2 Reporting Events
  - 1.3 Workstation Events
  - 1.4 Autosequence Events

Events



The calendar tab in Property Parameters. In this example, each day starts at 4:00. The "Create and Settle CC" PC Autosequence will run after the business day has been incremented.

Start of Day is programmed in Property Parameters on the calendar tab. The example image shows a configuration where each business day begins at 4:00. The discussion below will describe the events that occur when Monday's business day begins:

Database Events

Currently, the Sequencer Service is responsible for incrementing the business day. In the Enterprise Parameters module, the **SOD Sequencer Machine** field should be configured so the Sequencer Service will run for the correct machine (in environments where multiple machines are running the Sequencer Service).

The Sequencer Service will perform the following events at 4am:

1. For the Property and all RVCs (except RVCs using SOD overrides) in the property, two rows are added to the PERIOD_INSTANCE table in the Simphony database. These rows contain:
    - **HierStrucID** - this number represents the Property or RVC where the business day is being incremented. To determine the Property/RVC that corresponds to the HierStrucID, use the V_HIERARCHY database view
    - **StartTime** - the time that the business day began, in UTC
    - **BusinessDate** - the business day that is beginning. Note that this column is a DateTime data type, but only the date is relevant. Thus, database queries will likely show this value with the date *and* time: 2007-20-12 00:00:00.000
    - **LocalStartTime** - the time that the business day began, based on the time zone settings configured for the property in the Property module
    - **PrevPeriodInstID** - this is a reference to the PeriodInstID (primary key of PERIOD_INSTANCE) that represents the previous business day entry for the property. This column is used to construct the list of PERIOD_INSTANCE records that are obtained by workstations; it is also helpful when troubleshooting.
    - The **EndTime** and **LocalEndTime** values for these rows are NULL, because the business day has not ended yet!
2. Two rows in the PERIOD_INSTANCE table are updated. These are the rows for the previous business day, and the following values are updated:
    - **EndTime** - this value is the same as the **StartTime** for the new rows.
    - **LocalEndTime** - this value is the same as the **LocalStartTime** for the new rows.
3. The CHECKS table is updated.
    - All checks for the property that were closed on the previous business day are updated to have a CloseStatus of 2. (If the check includes a credit card tender, the CloseStatus remains at 0 until a credit card batch has been created.)

Reporting Events

DPS writes the business day information to the SPOS_COMPLETED_BUS_DAY table in the LOCATION_ACTIVITY_DB database. This information is used when taking a report from the Simphony Reporting engine.

DTS events run on their own schedule, as configured in EMC's mymicros.net module. The time for the "Move History" and "Purge" jobs should be scheduled *after* the business day has incremented.

Workstation Events

After the Database Events occur, workstations will obtain the latest business day information from the database based on the workstation's database update frequency. Workstations that do not have a connection to the database will follow the offline workstation rules for SOD.

Autosequence Events

Also after the Database Events occur, the PC Autosequence from the Property Parameters Calendar Tab is run. In the example image, this autosequence is called "Create and Settle CC". A typical SOD autosequence includes:

- Batching and/or settling of Credit Cards
- Running custom applications that a site uses

If the business day being started is the start of another period (Start of Week, Start of Month, etc.), the autosequence programmed for the period will be started after the autosequence for SOD has completed. The sequencer service checks to run the other autosequences in the following order:

- Start of Week
- Start of Payroll
- Start of Month
- Start of Quarter
- Start of Year

Start of Month

This article discusses general MICROS knowledge and/or **terminology**.

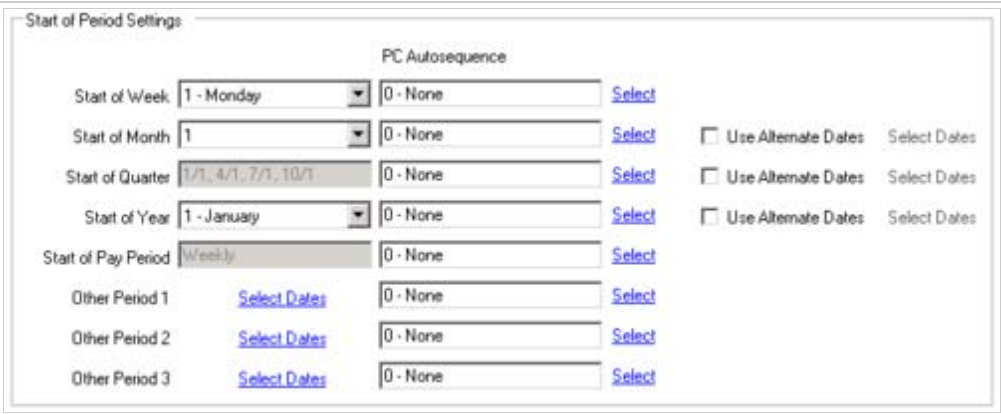
This article discusses behavior that is important for **Reporting**.

Start of Month, or **SOM**, refers to the beginning of a new business month in a property. In Property Parameters, a programmer determines the day of the month that is the first day of a business month. In most business practices, this is the 1st day of the month (January 1, February 1, etc.), but this may vary. Alternatively, a programmer may configure Start of Month to use alternate dates instead of using a fixed month; this practice is common at properties that use Accounting Calendars. In Simphony, some reports can be taken for the "current month" or the "previous month"; these reports use the Property Parameters Start of Month setting to determine which dates are to be included in the report.

Contents

- 1 Reporting
  - 1.1 Start of Quarter
- 2 Autosequences

Reporting



Start of Month is configured in Property Parameters, on the Calendar tab. A user can select one of the days of the month (1-28), or use the "Use Alternate Dates" setting. In addition, the programmer can configure a PC Autosequence to run when a new month begins.

When reports are taken for a month, what are the dates that will be displayed? The answer is determined by the type of month that has been configured. For the following examples, suppose that the current date is the April 19:

Typical Configuration: "1" is the SOM day

In most configurations, the SOM day is set to "1".

- A report run for "Previous Month" will show information from the March 1 business day to the end of the March 31 business date.
- A report run for "Current Month" will show information from the April 1 business day until the current second.

Another Configuration: "15" is the SOM day

This example uses the same behavior as the previous example.

- A report run for "Previous Month" will show information from the March 15 business day to the end of the April 14 business date.
- A report run for "Current Month" will show information from the April 15 business day until the current second.

Alternate Dates

For information on this configuration method, see Alternate Dates.

Start of Quarter

When SOM and Start of Year use "standard" configuration (instead of Alternate Dates), Start of Quarter is calculated using a combination of the SOY and SOM values. In the example image, Start of Quarter is configured for the dates 1/1, 4/1, 7/1, and 10/1 — this configuration is the combination of the "Start of Year" month (January) and the "Start of Month Day" ("1"), and then calculated every three months after that.

Consider another example:

- Start of Year is programmed as "February"
- Start of Month is programmed as "15"

Using this configuration, SOQ will be 2/15, 5/15, 8/15, and 11/15.

Autosequences

As mentioned in the Start of Day article, SOD runs its autosequence(s), and then when it is done:

The SOM autosequence is generally configured as **0-None** unless a property has a specific process (such as a custom application) that needs to run.

- The autosequence for SOW runs, if it is time to run SOW.
- The autosequence for SOPP runs, if it is time to run SOPP.
- The autosequence for SOM runs, if it is time to run SOM. SOM autosequences run when the business day that began with SOD is the first day of a business month, as determined by the SOM settings in Property Parameters.

Start of Quarter

This article discusses general MICROS knowledge and/or **terminology**.

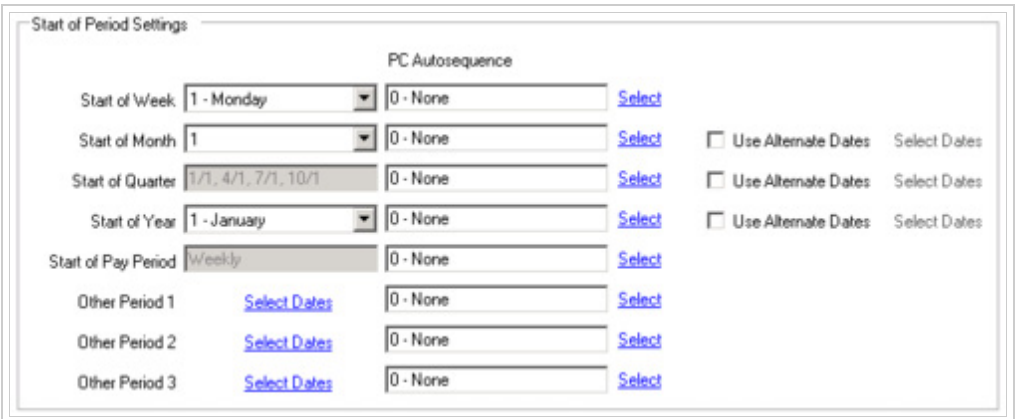
This article discusses behavior that is important for **Reporting**.

Start of Quarter, or **SOQ**, refers to the beginning of a new business quarter in a property. In Property Parameters, a programmer determines the month of the year that is the first month of a business year, and the day of the month that is the first day of a business month; together, these settings determine the date that is considered the first "Start of Quarter" date. The other quarters of the year begin three, six, and nine months after this quarter. Often, the first day of a business year is January 1, making the quarters January 1, April 4, July 1, and October 1; however this may vary. Alternatively, a programmer may configure Start of Quarter to use alternate dates instead of using a fixed calendar quarter; this practice is common at properties that use Accounting Calendars. In Simphony, some reports can be taken for the "current quarter" or the "previous quarter"; these reports use the Property Parameters Start of Quarter setting to determine which dates are to be included in the report.

Contents

- 1 Reporting
- 2 Autosequences

Reporting



Start of Quarter is configured in Property Parameters, on the Calendar tab. If standard years and months are in use, the Start of Quarter setting displays the four dates for SOQ. Alternatively, the "Use Alternate Dates" setting can be used. In addition, the programmer can configure a PC Autosequence to run when a new quarter begins.

When reports are taken for a quarter, what are the dates that will be displayed? The answer is determined by the type of quarter that has been configured. For the following examples, suppose that the current date is the April 19, 2007:

Typical Configuration: "January 1" is the SOY day

In many configurations, the SOM day is set to "1" and the SOY month is set to "January"; this results in January 1 as the first day of the business year, and the first day of a quarter.

- A report run for "Previous Quarter" will show information from the January 1, 2007 business day to the end of the March 31, 2007 business date.
- A report run for "Current Quarter" will show information from the April 1, 2007 business day until the current second.

Another Configuration: "February 15" is the SOY day

This example uses the same behavior as the previous example.

- A report run for "Previous Quarter" will show information from the November 15, 2006 business day to the end of the February 14, 2007 business date.
- A report run for "Current Quarter" will show information from the February 15 business day until the current second.

Alternate Dates

For information on this configuration method, see Alternate Dates.

Autosequences

As mentioned in the Start of Day article, SOD runs its autosequence(s), and then when it is done:

The SOQ autosequence is generally configured as **0-None** unless a property has a specific process (such as a custom application) that needs to run.

- The autosequence for SOW runs, if it is time to run SOW.
- The autosequence for SOPP runs, if it is time to run SOPP.
- The autosequence for SOM runs, if it is time to run SOM.
- The autosequence for SOQ runs, if it is time to run SOQ. SOQ autosequences run when the business day that began with SOD is the first day of a business quarter, as determined by the SOQ settings in Property Parameters.

Start of Week

Start of Week, or **SOW**, refers to the beginning of a new business week in a property. In Property Parameters, a programmer determines which day of the week is the first day of a business week. In Simphony, some reports can be taken for the "current week" or the "previous week"; these reports use the Property Parameters Start of Week setting to determine which dates are to be included in the report.

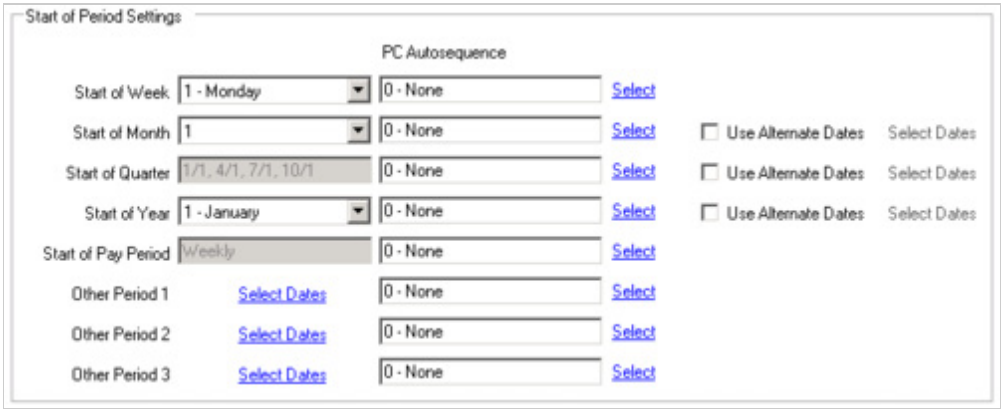
This article discusses general MICROS knowledge and/or **terminology**.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 Reporting
- 2 Autosequences

Reporting



Start of Week is configured in Property Parameters, on the Calendar tab. From here, a user can select one of the days of the week and configure the PC Autosequence that will run when a new week starts.

When reports are taken for a week, what are the dates that will be displayed? Suppose today is a Wednesday, and Start of Week is configured with "Monday" as the Start of Week day.

- A report run for "Previous Week" will show information from the start of the previous Monday's business day to the end of the most recent Sunday.
- A report run for the "Current Week" will show information from the start of the the most-recent Monday (two days ago) until the current second.

Autosequences

As mentioned in the Start of Day article, SOD runs its autosequence(s), and then when it is done:

The SOW autosequence is generally configured as **0-None** unless a property has a specific process (such as a custom application) that needs to run.

- The autosequence for SOW runs, if it is time to run SOW. SOW autosequences run when the business day that began with SOD is the first day of a business Week, as determined by the SOW day in Property Parameters.

Start of Year

This article discusses general MICROS knowledge and/or **terminology**.

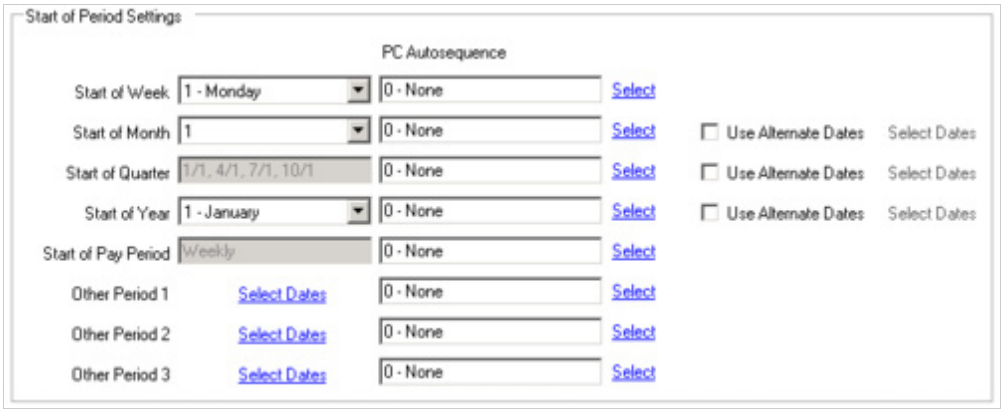
This article discusses behavior that is important for **Reporting**.

Start of Year, or **SOY**, refers to the beginning of a new business year in a property. In Property Parameters, a programmer determines the month of the year that is the first month of a business year; together with the SOM day, this determines the date that is considered the "Start of Year" date. Often, the first day of a business year is January 1, but this may vary. Alternatively, a programmer may configure Start of Year to use alternate dates instead of using a fixed calendar year; this practice is common at properties that use Accounting Calendars. In Simphony, some reports can be taken for the "current year" or the "previous year"; these reports use the Property Parameters Start of Year setting to determine which dates are to be included in the report.

Contents

- 1 Reporting
  - 1.1 Start of Quarter
- 2 Autosequences

Reporting



Start of Year is configured in Property Parameters, on the Calendar tab. A user can select one of the months of the year, or use the "Use Alternate Dates" setting. In addition, the programmer can configure a PC Autosequence to run when a new year begins.

When reports are taken for a year, what are the dates that will be displayed? The answer is determined by the type of year that has been configured. For the following examples, suppose that the current date is the April 19, 2007:

Typical Configuration: "January 1" is the SOY day

In many configurations, the SOM day is set to "1" and the SOY month is set to "January"; this results in January 1 as the first day of the business year.

- A report run for "Previous Year" will show information from the January 1, 2006 business day to the end of the December 31, 2006 business date.
- A report run for "Current Year" will show information from the January 1, 2007 business day until the current second.

Another Configuration: "February 15" is the SOY day

This example uses the same behavior as the previous example.

- A report run for "Previous Year" will show information from the February 15, 2006 business day to the end of the February 14, 2007 business date.
- A report run for "Current Year" will show information from the February 15 business day until the current second.

Alternate Dates

For information on this configuration method, see Alternate Dates.

Start of Quarter

When SOY and Start of Month use "standard" configuration (instead of Alternate Dates), Start of Quarter is calculated using a combination of the SOY and SOM values. In the example image, Start of Quarter is configured for the dates 1/1, 4/1, 7/1, and 10/1 — this configuration is the combination of the "Start of Year" month (January) and the "Start of Month Day" ("1"), and then calculated every three months after that.

Consider another example:

- Start of Year is programmed as "February"
- Start of Month is programmed as "15"

Using this configuration, SOQ will be 2/15, 5/15, 8/15, and 11/15.

Autosequences

As mentioned in the Start of Day article, SOD runs its autosequence(s), and then when it is done:

The SOY autosequence is generally configured as **0-None** unless a property has a specific process (such as a custom application) that needs to run.

- The autosequence for SOW runs, if it is time to run SOW.
- The autosequence for SOPP runs, if it is time to run SOPP.
- The autosequence for SOM runs, if it is time to run SOM.
- The autosequence for SOQ runs, if it is time to run SOQ.
- The autosequence for SOY runs, if it is time to run SOY. SOY autosequences run when the business day that began with SOD is the first day of a business year, as determined by the SOY settings in Property Parameters.

Stored Value Module and Driver Configuration Guide

Simphony 2.x

General Information

About This Document

This document provides the steps necessary to implement the iCare driver in MICROS Simphony v2.5 MR1 and greater. The Simphony iCare configuration settings are dependent on the type of Stored Value module used. All aspects of the Stored Value configuration are maintained in the Enterprise Management Console (EMC) module within Simphony.

***Note**: The XProcessor Extension Application is still available for use with the Simphony iCare interface. If the site wishes to continue using XProcessor, the instructions in this document do not need to be completed.*

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Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version	Comments
Rev A	November	2012	2.5 MR1	Configuration introduced with Simphony v2.5 MR1.
Rev B	January	2013	2.5 MR1	Added XProcessor Extension Application migration procedures (Appendix A)' updated 'About This Document' and 'Before You Begin' sections. Added Professional Services Procedures for Distributing Third Party Driver Package (Appendix B).
Rev C	January	2014	2.6	Updated document for v2.6. The section 'Professional Services Procedures for Distributing Third Party Driver Package' (Appendix B) was removed.
Rev D	August	2014	2.7	Updated document for v2.7.

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Simphony Setup Procedures 5

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Who Should be Reading this Document

This document is intended for the following audiences:

- MICROS Installers/Programmers/System Test Personnel
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Personnel
- MIS or IT Personnel

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of POS terminology and concepts
- Working knowledge of the Microsoft Windows interface
- Understanding of basic network concepts

Simphony Setup Procedures

Before You Begin

Before configuring the iCare driver, the following should be noted:

- Simphony v2.5 MR1 or greater must be installed at the property.
- You must have access to the EMC module within Simphony.

XProcessor Extension Application

- If the site is using the XProcessor Extension Application for iCare, leave the XProcessor installed at the Enterprise level until all clients are upgraded to Simphony v2.5 MR1 or greater and using the new iCare interface.

  Both the iCare Loyalty/SVC interface and XProcessor Extension Application can be configured at the Enterprise level; however, each interface needs to be deployed only to the correct locations/clients. AFTER the appropriate clients have all been upgraded to Simphony v2.5 MR1 or greater, then complete the steps in Appendix A: XProcessor Extension Application Removal Procedures (at the back of this document).

- You will need to retrieve the data extension overrides for each property (i.e., URL, userid, user_password, timeout_seconds). Write down these settings as you will need this information to create the new integrated iCare interface.
- Write down the current functions that the site was using through XProcessor. You will need this information to create the buttons for the new iCare interface.

Third Party Driver Package Distribution

If a third party has developed a driver, use the driver configuration settings provided by the third party. Third party drivers may have unique fields.

EMC Configuration

Overview

This section provides instructions to configure the Stored Value module and Stored Value driver for use with Simphony v2.5 MR1 or higher:

All aspects of the Stored Value driver configuration are maintained in the EMC module within Simphony. You will need to set up Stored Value option bits, configure the Stored Value module, then the Stored Value driver, and lastly the screen/button designs for Front of House (FOH) usage.

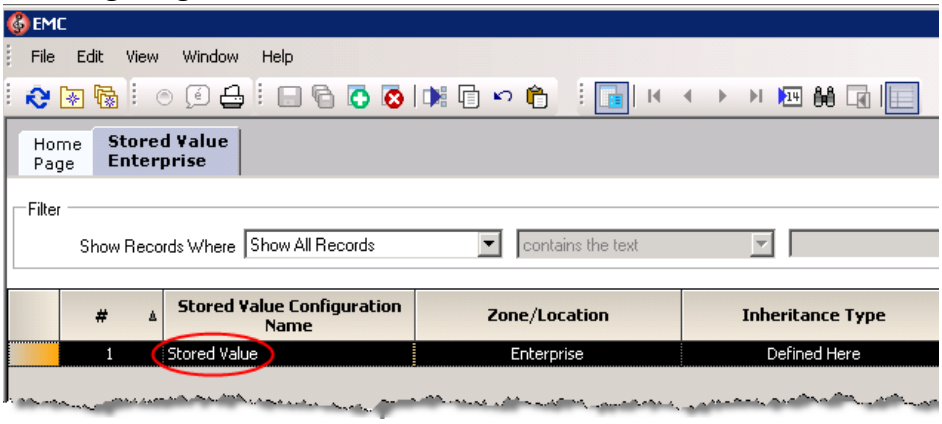
***Note**: The iCare driver is supported only on the Windows CE and Win32 operating systems.*

Stored Value Configuration

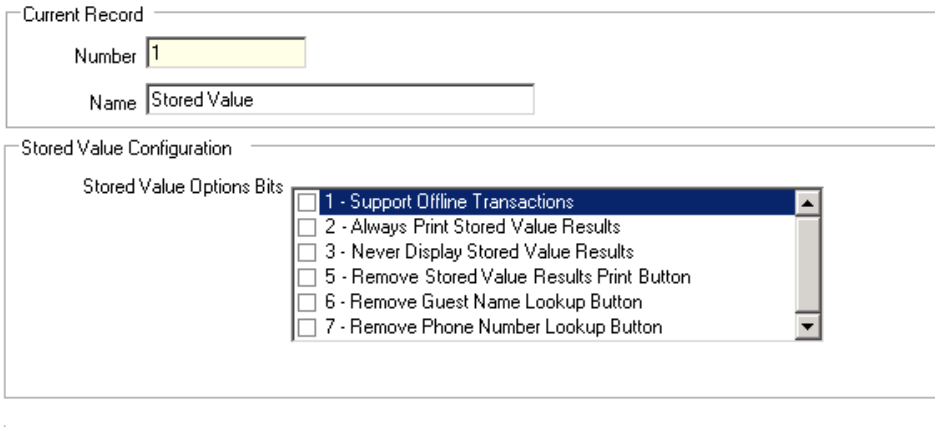
Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Configuration tab | Sales heading | Stored Value**.
3. If **Stored Value** already exists in the list of records, double-click its row to open. If Stored Value does not appear in the records list, add it using the green Insert Record button.



4. In the Stored Value Configuration area, enable (check) the desired Stored Value Option Bits. A description of each option bit is listed below:



- **Support Offline Transactions** - If enabled, offline transactions will be supported for Stored Value.
- **Always Print Stored Value Results** - If enabled, a chit will print automatically after each successful Stored Value operation.
- **Never Display Stored Value Results** - If enabled, Stored Value operations will not display the results (requires a touch to continue) before returning.
- **Remove Stored Value Results Print Button** - If enabled, the Stored Value results display will not show a Print button. (Use if the 'Always Print Stored Value Results' option above is enabled.)
- **Remove Guest Name Lookup Button** - If enabled, the Guest Name Lookup button will not display on the account number entry screen. (Disables Guest Name Lookup feature.)

- **Remove Phone Number Lookup Button** - If enabled, the Phone Number Lookup button will not display on the account number entry screen. (Disables Phone Number Lookup feature.)

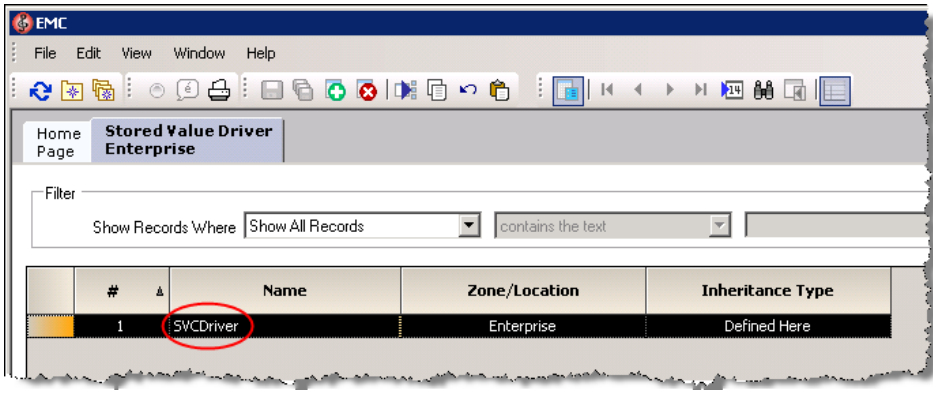
***Note**: The Guest Name and Phone Number Lookup buttons are only available with certain operations.*

5. Save and close the Stored Value Enterprise tab.

Stored Value Driver Setup

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Hardware/Interfaces heading | Stored Value Driver**.
3. If **SVCDriver** already exists in the list of records, double-click its row to open. If SVCDriver does not appear in the records list, add it using the green Insert Record button.



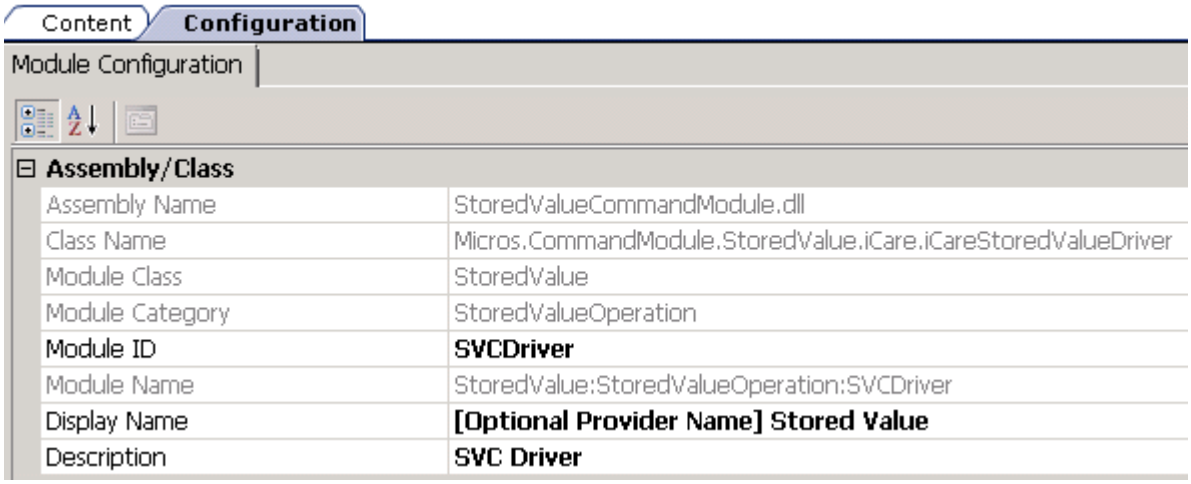
4. On the General tab, click the link called '**Import from a file**'.
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**StoredValueCommandModule.dll**'.
6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:

   - **Module ID** - This value is used to identify the module.
   - **Display Name** - This value will be used to display the module name in Simphony FOH windows and dialogs.
   - **Description** - This value cannot be empty.



SVCDriver Properties

The SVC Driver Properties are specific to the driver being used. The screen shown on this page depicts the iCare Driver Properties.

9. In the SVC Driver Properties section, enter information in the following fields:.

   - **Certificate File** - If a unique certificate file has been implemented, specify the location of the certificate file on the local machine.

- **Communications Offline Retry Count** - The number of transactions that will be completed offline before attempting an online transaction. The default value is '**5**'.
- **Communications Timeout Seconds** - The default value is '**60**'. Setting this value to '**0**' (zero) will equal no timeout.
- **Ignore Server Certificate** - Set this value to '**True**' unless a unique certificate file has been implemented to secure communication between the driver and endpoint.
- **Log iCare Client Debug Data** - If the client is using iCare, specify whether the system will include debug information in the log. The default value is '**False**' (disabled).
- **Log iCare Client Message Data** - If the client is using iCare, specify whether the system will include client messages. The default value is '**False**' (disabled).
- **Login** - Leave this blank at the Enterprise level as it will be set at the Property level.
- **Password** - Leave this blank at the Enterprise level as it will be set at the Property level.
- **Web Address** - The path to iCare, including location, port number and service path. Use the following format: https://[iCareLocation]:[iCarePortNumber]/ws/services/StoredValueService.

***Note**: If using a third party payment provider application (rather than iCare), enter the path to the third party payment provider application. This may be a Web address or local path.*

iCare Driver Properties	
Certificate File	
Communications Offline Retry Count	**5**
Communications Timeout Seconds	**60**
Ignore Server Certificate	**True**
Log iCare Client Debug Data	**True**
Log iCare Client Message Data	**True**
Login	
Password	
Web Address	**https://[iCareLocation]:[iCarePortNumber]/ws/services/Stor**

***Note**: The Offline Properties section cannot be edited. The values shown in this section are populated from iCare.*

10. Save your changes and close the Stored Value Driver Enterprise tab.

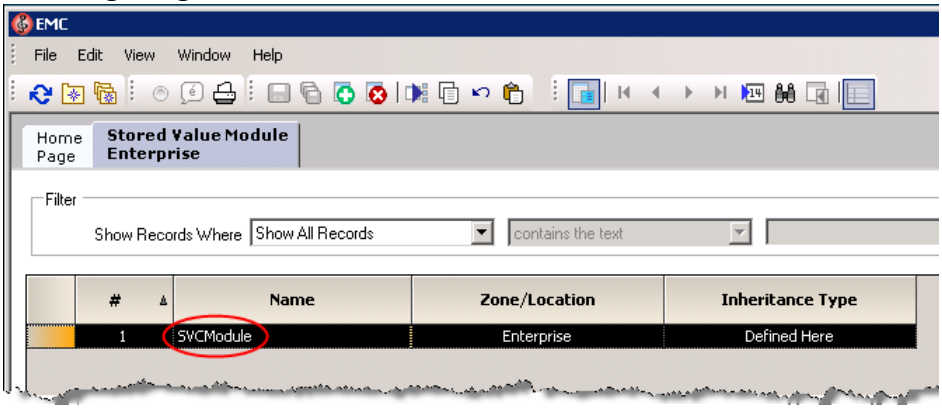
Stored Value Module Setup

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.

2. Navigate to **Setup tab | Hardware/Interfaces heading | Stored Value Module**.

3. If **SVCModule** already exists in the list of records, double-click its row to open. If SVCModule does not appear in the records list, add it using the green Insert Record button.



4. On the General tab, click the link called '**Import from a file**'.

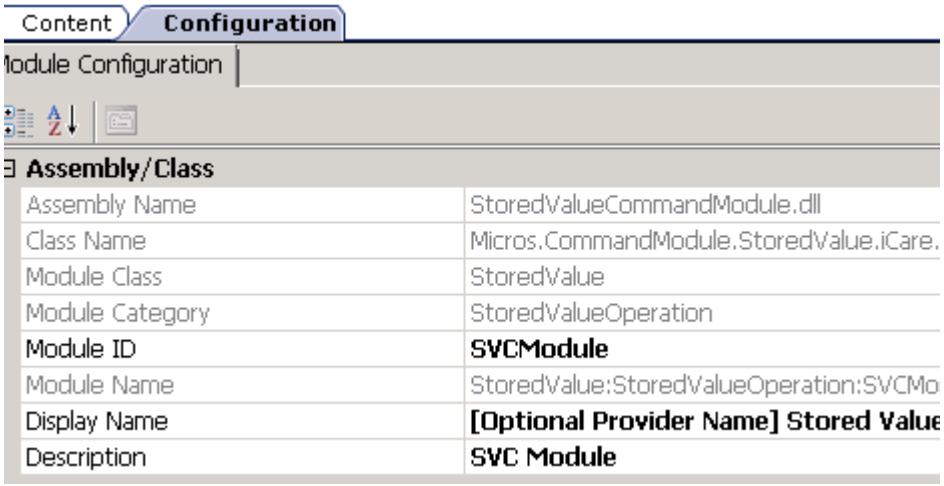
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**StoredValueCommandModule.dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:



- **Module ID -** This value is used to identify the module.
- **Display Name** - This value will be used to display the module name in Simphony FOH windows and dialogs.
- **Description** - This value cannot be empty.

Common Properties

9. In the Common Properties section, enter information in the following fields:

- **Currency ISO Code -** The code which represents the currency used (3 alpha characters). Please refer to http://www.currency-iso.org/dl_iso_table_a1.xls for a list of current Currency ISO 4217 codes (e.g., EUR= Euro, USD=US Dollar).

- **Language ISO Code -** The code which represents the language used (2 alpha characters). Please refer to http://www.loc.gov/standards/iso639-2/php/code_list.php for a list of current Language ISO 639-1 codes (e.g., EN=English, ES=Spanish).

***Note**: If the currency or language is different at the property, these values will need to be overridden at the Property level.*

Stored Value Module Properties

10. In the Stored Value Module Properties section, enter information in the following fields:

Stored Value Module Properties	
Account Number Maximum Length	24
Account Number Minimum Length	16
Cash Module Name	Cash:Cash
Max Card Activation Quantity	5
Max Card Issue Quantity	5

- **Account Number Maximum Length -** The maximum length of a Stored Value account number.
- **Account Number Minimum Length** - The minimum length of a Stored Value account number.
- **Cash Module Name** - The name of the cash module to use for redemptions. The MICROS default is '**Cash:Cash**'.
- **Max Card Activation Quantity** - The maximum number of Stored Value cards that can be activated with the Activate Multiple card feature.
- **Max Card Issue Quantity** - The maximum number of Stored Value cards that can be issued with the Activate Multiple card feature.

11. Save your changes and close the Stored Value Module Enterprise tab.

Property Level Configuration

Driver Only Override

1. In the Locations hierarchy, highlight the Property module.
2. Navigate to **Setup tab | Hardware/Interfaces heading | Stored Value Driver**.
3. Double-click the **SVCDriver** record to open it.
4. Click the '**Override This Record**' link.
5. Click the '**Yes**' button.
6. Click the '**Configuration**' tab.
7. In the SVCDriver Properties section, enter information in the following fields:
   - **Login** - Login for the property ID, OR the login for the provider.
   - **Password** - Password for the property OR the provider.

iCare Driver Properties	
Communications Offline Retry Count	**5**
Communications Timeout Seconds	**60**
Log iCare Client Debug Data	**False**
Log iCare Client Message Data	**False**
Login	**[Login credentials]**
Password	**[Password]**
Web Address	**[https://[iCarelocation]:[iCareportnumber]/ws/services/StoredVa**

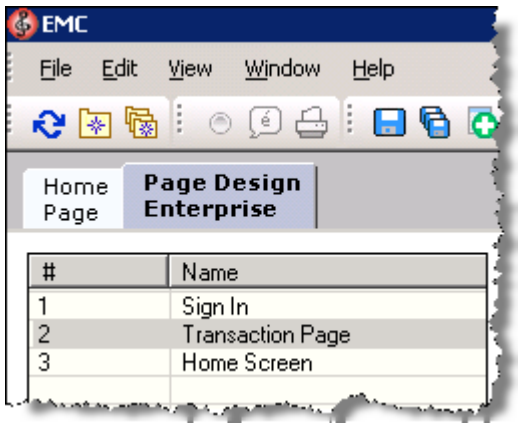
***Note**: The Offline Properties section cannot be edited. The values shown in this section are populated from iCare.*

8. Save your changes and close the SVC Driver Property tab.

Screen Design Configuration

The instructions below explain how to set up the FOH screen and buttons for use with the Stored Value functions.

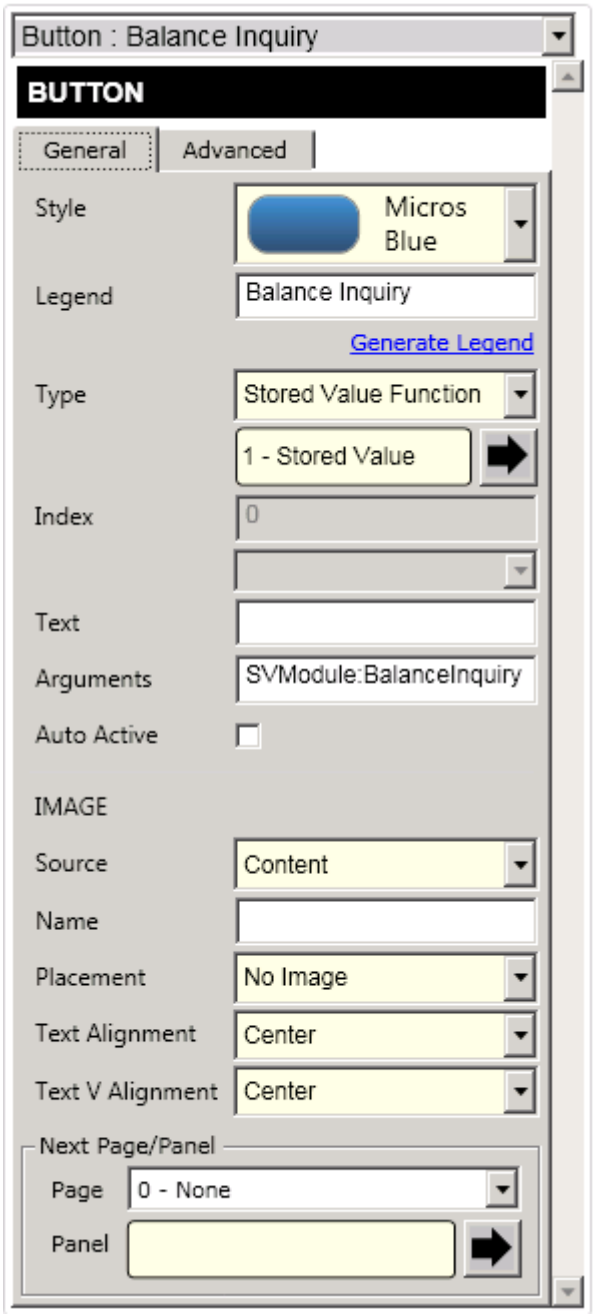
1. Open the EMC application in Simphony and log in.
2. Highlight the Enterprise module.
3. Navigate to **Configuration tab | User Interface heading | Page Design**.
4. Double-click the row of the desired page/screen to open it.



***Note**: The screenshots shown depict a Transaction Page as the example. Your system will likely have a different page or screen name for the buttons.*

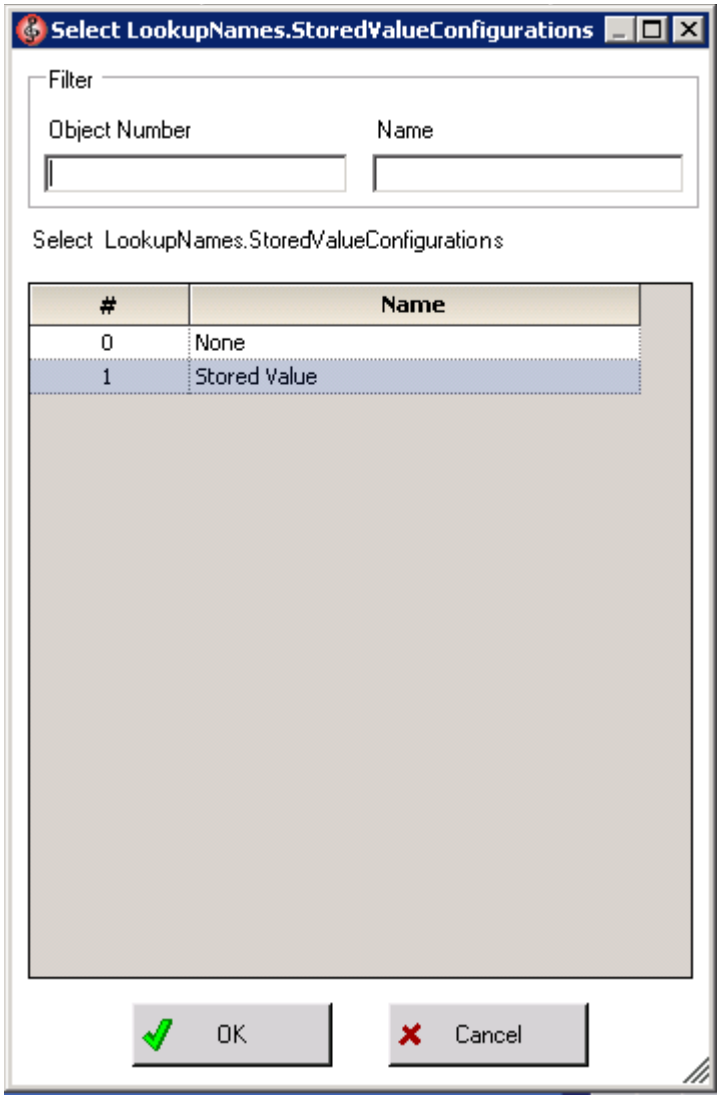
5. On the Edit tab, navigate to where the SVC functions are to be defined. This is typically either the Payment or Function area.
6. Click the Insert (+) button.

7. In the General tab select '**Stored Value Function**' from the Type drop-down.

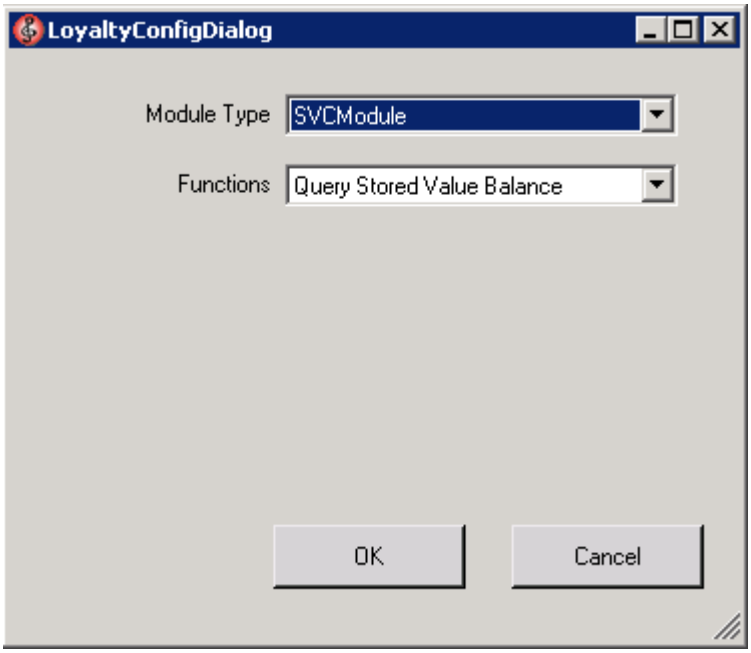


8. Directly under the Stored Value Function drop-down, click the black arrow.

9. On the *Select LookupNames.StoredValueConfigurations* window, select '**Stored Value**', and then click the '**OK**' button.



10. On the *LoyaltyConfigDialog* window, select '**SVModule**' for the Module Type and your desired function in the Functions drop-down list. Click the '**OK**' button.



11. Position and size the gray square button wherever you want to place it on the FOH screen. Use the Style drop-down to change the color.

12. In the Legend field, type the name of the button.

13. Repeat steps 5-13 for any additional supported Stored Value functions. The following Stored Value functions and descriptions are available.

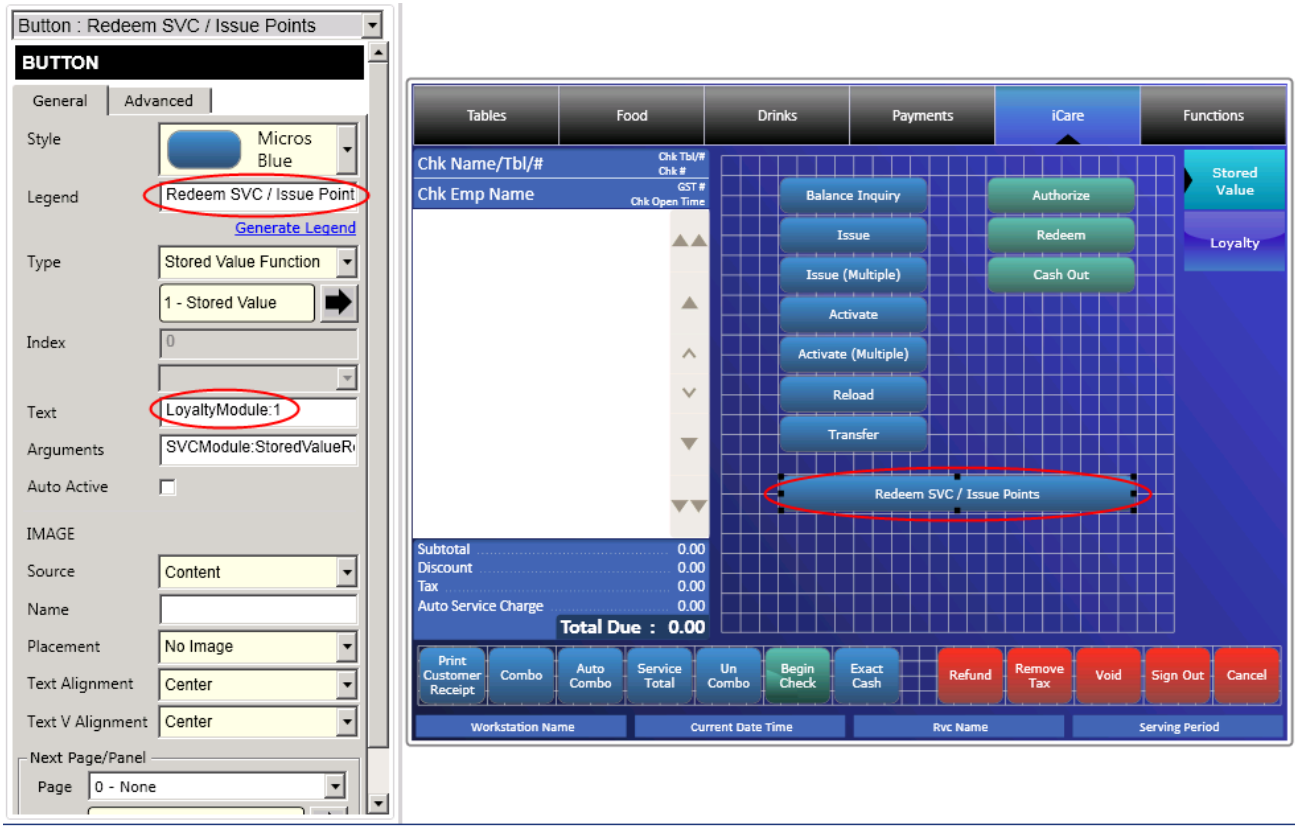
***Note**: Functions marked with an * are only available with iCare; they are not currently available with third party payment providers.*

- **Balance Inquiry** - Request the dollar value currently available on an SVC.

- **Issue SVC** - Issue a single SVC account number for a dollar value that is determined at the time of purchase.
- ***Issue Multiple SVCs** - Issue multiple SVCs for a dollar value that is determined at the time of purchase.
- **Activate SVC** - Activate a single SVC (the user will be prompted to enter the pre-defined dollar value to validate).
- ***Activate Multiple SVCs** - Activate multiple SVCs (the user will be prompted to enter the pre-defined dollar value to validate).
- **Reload** - Add funds to a single existing SVC account.
- **Transfer** - Transfer the funds and customer personal information (if applicable) associated with one SVC to another SVC.
- **Authorize** - Authorize a single SVC account number for use as payment on a Guest Check.
- **Redeem** - Pay for a Guest Check balance using an SVC.
- **Cash Out** - Obtain a cash payment for any remaining balance on an SVC account.
- ***Redeem SVC / Issue Points** - This function combines the Redeem SVC and Loyalty Issue Points functions into a single function. When used, the user is prompted to perform a redeem SVC transaction, and then issue points is automatically done by the POS.

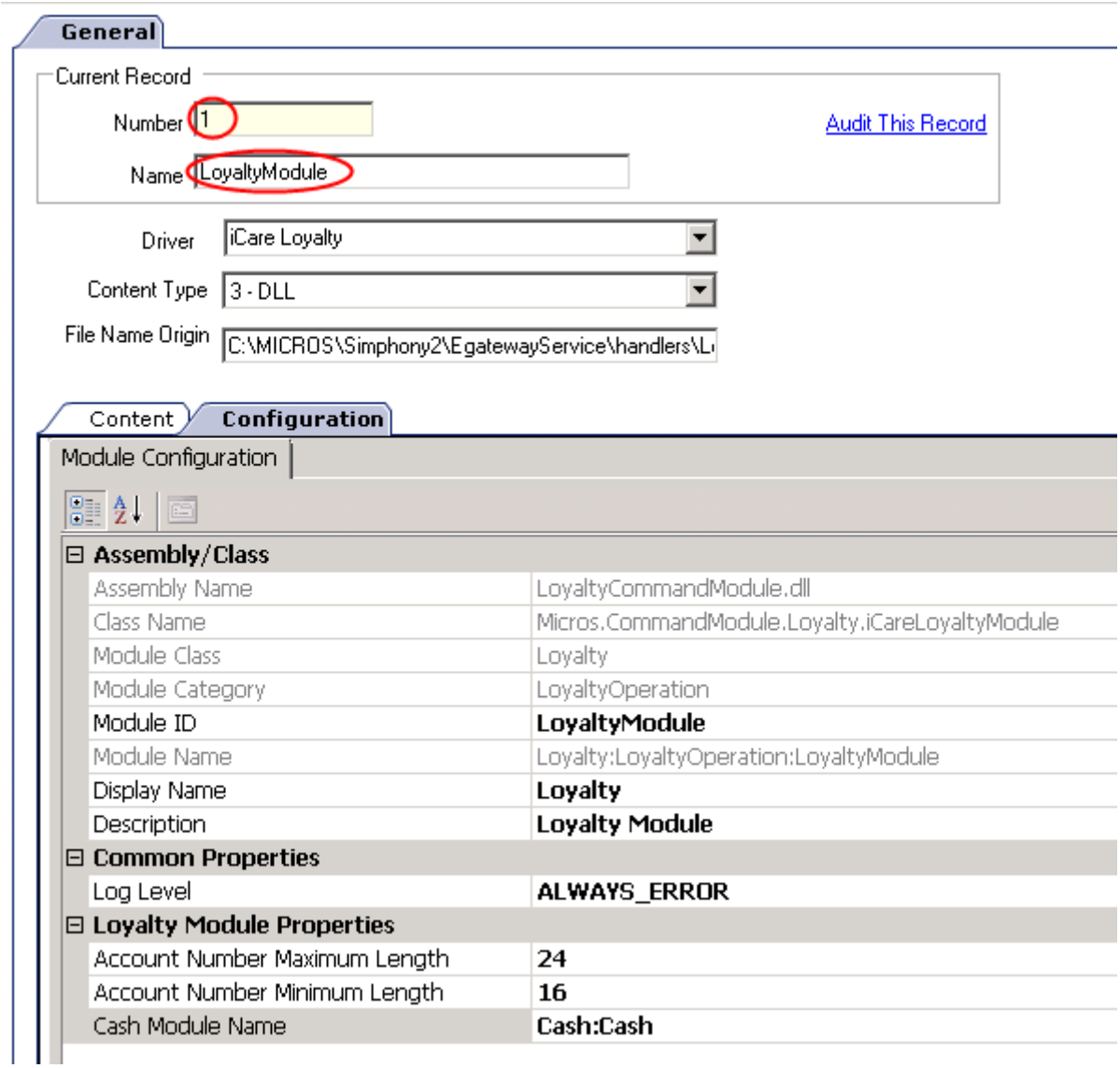
  The Redeem SVC / Issue Points function requires a special configuration to share data between the Loyalty and Stored Value modules. Follow the steps below to set up the Redeem SVC / Issue Points button.

14. On the General tab in the Text field, enter the LoyaltyModule Name and Record Number. Use the format "LoyaltyModuleName:RecordNumber" to process any Loyalty actions associated with this function.



***Note**: A site can load more than one type of Stored Value module, although MICROS does NOT recommend this. If the site has more than one Stored Value module, the Arguments field for the second module will need to be manually typed in to match the module name of the second driver.*

The Record Number and Module Name can be found by highlighting the Enterprise module and navigating to the **Setup** tab **| Hardware/ Interfaces heading | Loyalty Module**. The example below shows that the Record Number is 1 and the Module Name is LoyaltyModule. This information should be entered for step 14 above.



15. Save your changes and close the Page Design Enterprise tab.

Appendix A

XProcessor Extension Application Removal Procedures

Beginning with Simphony v2.5 MR1, sites have the option of installing the new Stored Value driver for iCare (in place of the XProcessor Extension Application).

***Note**: Ensure that the appropriate clients have been upgraded to Simphony v2.5 MR1 or greater prior to completing the instructions in this appendix.*

Remove CAL Directories and EMC CAL Package

1. Navigate to the CAL server's Win32 or WinCE sub-directory for iCare:
   - CAL\Win32\ICareProcessor2.0 directory
   - CAL\WinCE\ICareProcessor2.0 directory
2. Delete the 'ICareProcessor2.0' directory.
3. In EMC, navigate to **Setup tab | Hardware/Interfaces heading | CAL Packages**.
4. Delete the CAL Client package that was used to deploy the ICareProcessor2.0 directory to the workstation(s).

Remove XProcessor Extension Application

5. Delete the following DLL files from the disk:
   - Micros.XProcessor.dll
   - Micros.XProcessor.SVC.dll
   - Micros.XProcessor.SVC.ICare.dll
6. In EMC, navigate to **Setup tab | Custom Content heading | Extension Application**.
7. Delete the Extension Application for XProcessor.

Remove XProcessor Payment Driver from EMC

8. In EMC, navigate to **Setup tab | Hardware/Interfaces heading | Payments**.
9. Delete the XProcessor Payment driver.

Remove XProcessor Closed Check Tender Media

10. In EMC, navigate to **Configuration tab | Sales heading | Tender/Media**.
11. Delete ‘XProcessor Close Check’.

Remove XProcessor Configuration Content and Data Extensions

12. Delete the iCareSvcProcessor.icare.xml file.
13. In EMC, navigate to **Configuration tab | Reporting and Data heading | Data Extensions** and delete the data extensions for each property.

Remove Buttons from Page Designer

14. Navigate to **Configuration tab | User Interface heading | Page Design**.

15. Double-click the record with the screen containing iCare buttons to open it.

16. Delete all iCare buttons.

Reuse Additional Items for Posting

Depending on the site's iCare configuration, additional menu items, discounts, service charges, or tenders may have been used. If these items are in use, leave these additional items and do not delete them.

Remove Install Files for Check Reprocessor

If the site was using the Check Reprocessor service, remove the installed check reprocessor files from the enterprise service host as the new iCare interface has its own plug-ins.

17. Navigate to the Handlers directory where the Check Reprocessor was run.

18. Open the ChkReprocSvcHost.DLL.config file.

19. Delete the following tag:

```
<pluginAssembly displayname="XProcessor Reprocessor"
fullname="Micros.XProcessor.SVC.dll,
Version=0.0.0.0, Culture=neutral,
PublicKeyToken=null" />
```

20. Leave the tags `<pluginAssemblies>` and `</pluginAssemblies>`.

21. In the Handlers directory, delete the following DLL files:

- Micros.XProcessor.Payment.dll
- Micros.Ops.Extensibility.dll
- Micros.XProcessor.dll
- Micros.XProcessor.SVC.dll
- Micros.XProcessor.SVC.iCare.dll

Suspending and Resuming Checks

Contents

- 1 Benefits of Suspend/Resume
- 2 Configuring Suspend/Resume
  - 2.1 Enabling Suspend/Resume
  - 2.2 Configuring a Tender/Media
  - 2.3 Adding a Tender/Media key
  - 2.4 Configuring the employee auto sign-out period
- 3 Using Suspend/Resume
  - 3.1 Suspending a check
  - 3.2 Resuming a check
- 4 See also

Benefits of Suspend/Resume

With Suspend/Resume you can:

- Suspend a check started by another employee, and sign in to the workstation.
- Suspend a check when the workstation automatically signs out an employee.
- Suspend a check using a Tender/Media key.

When suspended, the check is stored in the memory until it is resumed.

Configuring Suspend/Resume

Enabling Suspend/Resume

1. Navigate to *EMC > Revenue Center > Setup tab > Parameters > **RVC Parameters***.
2. Go to the Options tab.
3. Select **[60 - Enable Suspend/Resume]**.
4. Click **Save**.

Configuring a Tender/Media

You need to add a Tender/Media key to use the Suspend/Resume function.

1. Navigate to *EMC > Configuration tab > Sales > **Tender/Media***.
2. Insert a record and provide a Record Name.
3. In the General tab, select the Key Type as **[2 - Service Total]**.

4. Navigate to the *Options* > *Ops Behavior* and enable the option, **[74 - Suspend Order]**.
5. Click **Save**.

Adding a Tender/Media key

To manually suspend a check, you need to add a button assigned to the service total tender key created in the Configuring a Tender/Media section.

1. Navigate to *EMC* > *Configuration tab* > ***Page Design***.
2. Insert a button.
3. Select the Type as Tender/Media.
4. Select the service total tender created in the Configuring a Tender/Media key procedure.
5. Click **OK**.
6. Click **Save**.

Configuring the employee auto sign-out period

To automatically suspend a check and sign out an employee, you need to define the automatic operator popup interval.

1. Navigate to *EMC* > *Setup tab* > *Parameters* > ***Control Parameters***.
2. From the Configuration tab, set the **Automatic Operator "Popup" Interval (min:sec)**.
3. Click **Save**.

Using Suspend/Resume

Suspending a check

To suspend a check, the workstation screen should be free from any prompt or error message. You can suspend only one check at a time. Suspended checks are not displayed in the Open Check SLU (Screen Look Up).

You can suspend a check in the following ways:

- By signing into the workstation while another employee's check is open.
- By configuring the workstation to suspend a check when a workstation automatically signs out an employee.
- By pressing the suspend order tender key.

The suspended check may be added or transferred between revenue centers if there are no items pending dispatch to the kitchen.

When you suspend a check, the workstation posts the check to the database but does not print it.

Resuming a check

When you sign in to the workstation, any suspended check is automatically resumed.

You can resume a check only from the workstation that suspended the check.

Suspending checks across workstations in a revenue center

This feature or functionality was introduced in Simphony 2.7 MR2.

Understanding suspended checks across workstations

Follow Me allows you to use suspended checks across workstations in the same revenue center. This feature is built around speed of service in a typical pub and fast casual restaurant environment.

For example, a pub may have three workstations and up to twelve bartenders working simultaneously. Each bartender can sign in/out on any of the workstations. A bartender can begin a check on workstation 1, prepare a drink, and then log on to workstation 2 to resume the check. The check is suspended on workstation 1 and automatically resumed on workstation 2. Any menu items, discounts, and service charges that were rung on workstation 1 appear on workstation 2. A check can be open on only one workstation at a time.

The following outline illustrates a workflow example when two or more employees share a single workstation. In this workflow, the two employees are Sarah and Ben.

Sarah

1. Signs into the workstation and begins a fast transaction by ordering a few beers.
2. Turns around to speak with a guest and does not service total the check.

Ben

3. Walks up to the same workstation and swipes his card to sign in while Sarah's check is still open. Ben is now signed in and Sarah's check is automatically suspended.
4. Begins a new fast transaction with an order for fish & chips.
5. Walks away to get a beer order, leaving his check open on the workstation.

Sarah

6. Walks up to the same workstation and swipes her card to sign in.
7. Automatically resumes the check that was suspended when Ben signed in during Step 3.
8. Tenders the check.

This scenario continues repeatedly in a pub or fast casual restaurant environment. Each employee is taken directly to the check that they are working on when signing in until that check is either service totaled or paid. After a service total or final tender, the employee can begin a new check or pick up an existing check. Kitchen items are fired only after performing a service total or final tender.

The same workflow with a single workstation is consistent when multiple workstations are present. If Sarah has a suspended check, then regardless of which workstation she goes to next in that revenue center, she automatically resumes the check upon sign-in.

The journal logs the suspend/resume history of each check and lists the workstation on which the suspend/resume transaction was performed.

Configuring Follow Me

1. In the EMC, select Revenue Center, select Setup tab, select RVC Parameters, and then select **Options**.
2. Select option **[68 - Enable Follow Me]**. When you enable Follow Me, option **[60 – Enable Suspend/Resume]** is dimmed, and vice versa. Follow Me and Suspend/Resume cannot be enabled at the same time; they are mutually exclusive. When you enable Follow Me, each workstation in the revenue center participates in the Follow Me operation.
3. In the EMC, select Property, select Setup, select Workstations, and then select **General**.
4. Enter values for the following fields:

Timeout Setting	Description
Check Inactivity Timeout	The number of seconds the workstation waits before prompting the operator to cancel a transaction. If you set this value to 0 (zero), the cancel dialog box does not appear. Selecting this option causes the employee to be automatically signed out and the check suspended. Kitchen items are not fired when the check inactivity timeout occurs. These items are fired after a service total or final tender. If you select RVC Parameters option **[68 – Enable Follow Me]**, the guest check automatically gets suspended rather than cancelled.
Check Inactivity Dialog Timeout	The number of seconds the workstation shows the inactivity dialog box ("Do you need more time?") before the workstation automatically cancels the transaction. If you set this value to 0 (zero), the cancel dialog box does not appear.

See also

- Suspend and Resume Checks
- RVC Parameters

Table Number

A **Table** is a seating location for one or more guests in a restaurant. In Simphony, tables are identified by **Table Numbers** or **Table IDs**. A table number (or table ID) is programmed in the EMC and assigned to a check by the operator.

This article belongs to the MICROS **Important concepts** category.

This article relates to programming of an EMC module.

This article discusses the usage of one or more **Function Keys**. (522)

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 EMC Programming
  - 1.1 Tables Module
  - 1.2 RVC Parameters
- 2 Workstation Operations
- 3 Other Options
  - 3.1 Revenue Center Parameters
  - 3.2 Function Keys
- 4 Privileges
- 5 See also

EMC Programming

Tables can be referenced by object number or name. Typically, object number is used, but the name field is sometimes used for restaurants that use letters to represent table sections (r-1 or b-1, to represent "restaurant table 1" vs. "bar table 1").

Tables Module

Tables are programmed per Revenue Center. In the Tables module of the EMC, there are two columns that can be programmed — object number and name. The "name" of a table can be programmed as a four-digit string of numbers and/or alphanumeric characters, while the object number is always a numeric value.

#	Name
1	t-1
2	t-2
3	t-3
4	
5	
6	
7	
8	
9	
10	

Tables module of the EMC. The Name column does not need to be completed unless the the RVC Parameters option, **[ON = Use 5-digit Table #; OFF = Use 4-digit Character Table ID]**, is disabled.

RVC Parameters

In RVC Parameters, the Options/General box contains option **[#18 - ON = Use 5-digit Table #; OFF = Use 4-digit Character Table ID]**. This option bit controls what should be entered when a user is prompted for Table Number on the workstation — either the "Table ID" (programmed as the "Name" in the image shown), or the "Table Number." The Context Sensitive Help for this option states:

Select this option to use the 5-digit table numbers programmed in the Tables module. Disable this option to use the 4-character Table ID entered in the Table Module. This option must be disabled when International LDS is used.

Workstation Operations

At a workstation, an operator is forced to enter a table number if the operator option, **[Table Number Entry Required to Begin/Pickup Checks]** is enabled. This option is generally enabled for servers but not for bartenders. Typically, servers have a Default Transaction Screen that has a **[Begin Table]** function key programmed on it, so why is this option even necessary? Most often, this functionality comes in to play when a check is being transferred. Consider this example:

1. The bartender begins a check for a couple who sits at the bar. The check is begun without a table number (typical for a bartender).
2. The couple has one drink each, then wants to go to the restaurant.
3. When the server transfers the check, he/she is prompted to enter the table number. If the operator option bit was disabled, this prompt would not have occurred.

Other Options

There are other options that affect the behavior of Table functionality:

Revenue Center Parameters

Print Table Number Double Wide on Guest Checks Only
: This option, #3 in Format Parameters, causes the table number, if used, to print in double-wide format on the guest check.

Allow Only One Group per Table
: Select this option (#9 in Control options) to prevent an operator from assigning more than one group to a table, meaning that an operator can only open one check per table (if Table #11 is open, another Table #11 cannot be begun). Disable this option to allow an operator to begin a Table Number even though a Table is already open with the same number. ***Note:*** *When using Touch Split, multiple groups are created for the same table — this option does not affect Touch Split.*

Function Keys

Function Key #522
: The **[Table Number]** function key (522) is used to assign a Table Number to a check manually (without being prompted by the workstation). This key can only be used for checks without a Table Number or Table ID currently assigned. When this key is pressed, the operator can assign a Table Number or Table ID to the current check.

More function keys
: See the Check Begin/Pickup function keys page for a description of functions used to start and pickup checks by table number.

Privileges

- It is only possible to begin a multiple groups at the same table if the employee is associated with an Employee Role with the **[Authorize/Perform Open of Checks for Multiple Groups at a Table]** option enabled.

- The **[Table Number]** function key (522) can only be used by employees associated with an Employee Role with option **Authorize/Use [Table Number] key** enabled.

Tax Class

A **Tax Class** is a collection of Tax Rates; Tax Classes determine the Tax Rates that apply to Menu Items and Service Charges, and also which Tax Rates are reduced by Discounts.

This article relates to programming of an EMC module.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 EMC Configuration
  - 1.1 Menu Item Class
  - 1.2 Service Charges
  - 1.3 Discounts
- 2 Examples
  - 2.1 State and City Tax
  - 2.2 Liquor: Inclusive/Exclusive

EMC Configuration

Tax Class records are configured in the **Tax Classes** module, found on the Setup tab, under the Taxes and Order Types header. This module is zoneable; Tax Class records can be configured at the Enterprise, in a Zone, or for a Property. There are two configurable fields for Tax Class records:

Name
: The name field describes the types of Tax Rates that are enabled for the Tax Class. Tax Classes are commonly named "Food Tax" or "Beverage Tax", etc.

Taxes Enabled
: This is an option bit field that contains the 64 Tax Rates available for the location. Any Tax Rate that is checked is active for the Tax Class.

Menu Item Class

Each Menu Item Class can be linked to a Tax Class record. With this configuration, all Menu Item Definitions that are in the Menu Item Class will be taxed using the selected Tax Class record. For example:

1. A Tax Rate named "Liquor Taxes" exists and has an Inclusive Tax Rate of 6%.
2. A Tax Class named "Alcoholic Beverages" has one Tax Rate enabled, "Liquor Taxes".
3. A Menu Item Class named "Beer" is linked to the "Alcoholic Beverages" Tax Class.
4. All items in the Beer Menu Item Class will therefore be taxes at 6%.

Service Charges

Each Service Charge record can be linked to a Tax Class. This configuration is generally used for banquet or room service environments, where specific types of Service Charges are required to be taxed.

Discounts

Each Discount can be linked to a Tax Class; this configuration helps to determine which Tax Rate(s) should be discounted when an item is discounted. Consider this configuration:

- A $5.00 sandwich is in a Menu Item Class and linked to a Tax Class with a 6% add-on tax.
- A 100% discount is applied to a check that includes only the sandwich.

If the discount is linked to a Tax Class with the 6% add-on tax, the transaction will have a balance of $0. If the discount is not linked to a Tax Class, the transaction will have a balance of $0.30 ($5 x %6).

Examples

See also:

A Tax Class may contain zero to 64 active Tax Rates, but it is typical that a single Tax Class has one to three Tax rates enabled. By grouping multiple Tax Rates into a single Tax Class, a programmer may see a record named "Food Tax" in other EMC modules, without having to worry about which Tax Rates will be enabled.

A Tax Class can be programmed with multiple Inclusive Tax Rates, but the workstation will display the error, **`Tax class programming error. Only one inclusive tax rate allowed`**, if more than one Inclusive Tax Rate is active at the time of the transaction.

The following examples illustrate common programming configurations for Tax Classes with multiple Tax Rates enabled:

State and City Tax

In some jurisdictions, multiple Tax Rates apply to food items; usually these Tax Rates must be calculated separately for accounting purposes (so each jurisdictional government can collect the appropriate tax amount). A common example is a restaurant that must pay taxes to both the state and the city:

- State: 5% tax
- City: 2% tax

In this example, the "Food" Tax Class will have both the "State" and "City" Tax Rates enabled. The total tax for a food item would then be 7%.

Liquor: Inclusive/Exclusive

For customer convenience, bars often use inclusive taxes. In some multi-RVC Properties, it is common that a bar RVC uses inclusive taxes while a restaurant RVC uses add-on taxes, even though the same items are being served. In this scenario, the configuration of a "Liquor" Tax Class would be something like this:

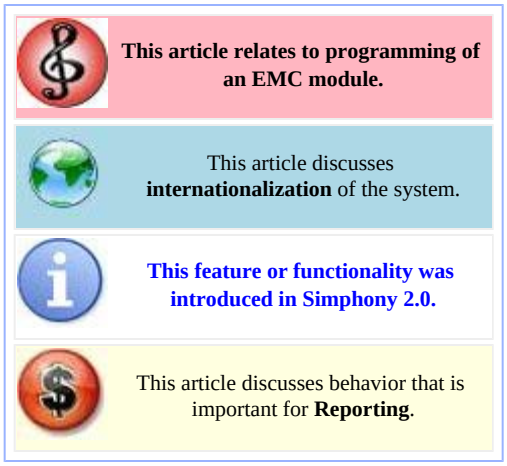
- Inclusive Tax Rate, 5%
- Add-on Tax Rate, 5%

Using this configuration, a programmer would then configure either Order Types or Serving Periods to enable the appropriate Tax Rates in the RVCs. Using Order Types as the example:

RVC	Order Type Tax Configuration
Bar	▪ Inclusive Tax Rate ENABLED ▪ Add-on Tax Rate DISABLED
Restaurant	▪ Inclusive Tax Rate DISABLED ▪ Add-on Tax Rate ENABLED

Tax Parameters

The Tax Parameters EMC module allows you to configure option bits related to taxes. This functionality was introduced in Simphony 2.0. (In previous Simphony versions, the fields from this module were configured in RVC Parameters.) You can configure the Tax Parameters module at the enterprise, zone, property, and revenue center levels.



Configuring Tax Parameters

1. In the EMC, select Enterprise / Property / Zone / Revenue Center, select Setup, and then select **Tax Parameters**.
2. Click the **International Options** tab.
3. Enter information in the following fields.

International Option	Description
1 - ON = Apply Tax as Add-On; OFF = Apply Tax as VAT	Select this option to treat taxes as add-on. Deselect this option to treat taxes as value added tax (VAT). If you enable VAT, all tax rates in use must be type "Included, Percentage".
2 - Enable Singapore Tax	Select this option to enable the Singapore tax option.
3 - Print Tax Itemizers	Select this option to print tax itemizers on guest checks and receipts. (You must select this option for Philippine tax.) An itemizer is considered a bucket that holds the sale amount of all items taxed at a specific rate. At the end of a transaction, the tax is then applied to the subtotal of all items in the bucket. Menu item classes are linked to tax classes which are, in turn, linked to tax rates 1-64. When you link to a tax rate, you are, in effect, creating an itemizer "bucket" for that item.
4 - Enable Canadian GST	Select this option to enable Canadian Goods and Services Tax (GST).
5 - Enable Japanese Tax	Select this option to enable the Japanese tax option.

6 - Enable Thailand Tax Printing	Select this option to enable the Thailand tax option.
7 - Enable Taiwanese Government Uniform Invoice Handling	Select this option to enable the Taiwanese Government Uniform Invoice (GUI) handling tax option.
8 - ON = Taiwanese Tax on RVC Level; OFF = Property Level	Select this option to apply the Taiwanese GUI per revenue center. Deselect this option to apply the Taiwanese GUI per property.
9 - Japanese Tax Rounding ON = Truncate digits after decimal; OFF = Round digits after decimal	This option is not yet implemented.
10 - Print Japanese Amount Due	Select this option to print the amount of Japanese tax due even if summary totals are suppressed for the Tender/Media.
11 - Allow Discounts to Affect Japanese Excise Tax Threshold	Select this option to allow discounts to change the amount of the threshold used for Japanese excise tax.
12 - Thai Tax Trailer Uses WS Number Instead of RVC Number	This option is only used when [6 - Enable Thailand Tax Printing] is selected. Select this option to print the last two digits of the workstation number on the Tax Invoice and Account Record lines. Deselect this option to print the last two digits of the revenue center number.
13 - Truncate Inclusive Taxes	This option applies to all inclusive tax calculations. It determines whether the inclusive tax amount that is calculated is rounded or truncated. For example, if a currency has two decimal places and the tax calculated is 12.005, the rounded tax is 12.01 but the truncated tax is 12.00.
14 - Print Item Inclusive Tax Total	If the check contains items with inclusive taxes, this option allows the total inclusive tax to print on the guest check. The line prints according to Tax Parameters option [4 - Print Inclusive Tax Totals when 0.00]. The inclusive tax amount is the sum of the inclusive taxes for each item on the check. You must also select Tender/Media options [21 - Print Summary Totals] and [24 - Print Inclusive Tax or VAT Lines on Check or Receipt] for the inclusive tax totals to print.
15 - Print Check Inclusive Tax Total	If the check contains items with inclusive taxes, this option allows the total inclusive tax to print on the guest check. The line prints according to Tax Parameters option [4 - Print Inclusive Tax Totals when 0.00]. The inclusive tax amount is calculated on the total sales for each tax rate. You must also select Tender/Media options [21 - Print Summary Totals] and [24 - Print Inclusive Tax or VAT Lines on Check or Receipt] for the inclusive tax totals to print.

4. Click the **Options** tab.
5. Enter information in the following fields.

Option	Description
1 - Do Not Include Tax in Totals on Tip Reports	Select this option to prevent a transaction's calculated tax amount from posting to the gross receipts and charged receipts totals on tip reports.
2 - Require a Reference Entry with Tax Exemptions	Select this option to require operators to enter a reference entry when using an exempt tax function key.
3 - Print VAT Lines Before Summary Totals	Select this option to print VAT lines before summary totals on guest checks and customer receipts.
4 - Always Print VAT Lines Even if 0.00	Select this option to print VAT lines on guest checks and customer receipts even if the calculated tax due is $0.00.
5 - Print Consolidated VAT Line on Checks and Customer Receipts	Select this option to print a consolidated VAT line. If you use this option in conjunction with individual VAT line printing, the consolidated line prints last.
6 - Print VAT Net Totals on Guest Checks and Customer Receipts	Select this option to print a VAT Net Totals line on guest checks and customer receipts.
7 - Print Tax Exempt Voucher	Select this option to print a voucher when any tax is exempted. The voucher prints when a tax exempt function key or a tender exempts tax. The voucher prints at the validation printer designated for the workstation. Deselect this option to suppress printing of a tax exempt voucher.
8 - Post Taxable Sales When the Tax Rate is Zero	Select this option to have taxable sales post to the TAX_DAILY_TOTAL table in mymicros.net when the tax rate is set to 0.00%. The taxable amounts can be used for reporting even though there will be no taxes. Deselect this option so that taxable sales do NOT post to mymicros.net when the tax rate is set to 0.00%.

6. Select the VAT printing options for the appropriate tax rates.

See also

- Parameters

Taxes	Taxes · Tax (disambig) · Tax Class · Tax Exempt Voucher · Tax Exemption · **Tax Parameters** · Tax Rate · Which Tax Rate(s) are active?
Learning series: Taxes	

Tender and Service Charge Parameters

Tender and Service Charge Parameters, almost always shortened to **Tender Parameters**, is the EMC module where a user determines the default Tenders and Service Charges used for a location. This functionality was introduced in Simphony 2.0; in previous versions, the fields from this module were configured in RVC Parameters. This module is zoneable; it can be configured at the Enterprise, in a Zone, in a Property, or in a RVC.

This feature or functionality was introduced in Simphony 2.0.

This article discusses behavior that is important for **Reporting**.

Contents

- 1 EMC Configuration
  - 1.1 Tender Settings
  - 1.2 Service Charge Settings
- 2 See also

EMC Configuration

There are five configurable fields in this module:

Tender Settings

Default Cash Tender
: From the drop-down list, select the **[Cash]** Tender/Media record for this Zone or Location. This selection ensures the following conditions:

  - Change due amounts deduct from this Tender/Media (regardless of which tender key is used to record payment)
  - Tips paid transactions are deducted from this Tender/Media
  - Checks closed using the **[Open Check Block Settlement]** function key (434) are closed to this Tender/Media.

  The list shows Tender/Media records that are configured as the "Payment" type.

Default Bank Loan Tender
: From the drop-down list, select the [Bank Loan] Tender/Media record that will be used in this Zone or Location. The list shows Tender/Media records that are configured as the "Loan" type. See also, Bank Entry Required.

Default Reprint Check Tender
: From the drop-down list, select the Tender/Media record that will be used when Reprinting Checks in this Zone or Location. This list shows all configured Tenders — the workstation uses this tender to determine formatting and layout options — however, it is typical that a "Reprint Closed Check" service total tender is configured specifically for this task.

Service Charge Settings

See also: Cover Charge, Automatic Service Charge

Cover Charge

From the drop-down list, select the cover charge, if any, for this Zone or Location. The drop-down menu displays only Service Charges that are programmed as preset-amount Service Charges that are not Non-Revenue Service Charges and that Add to Guest Count.

Automatic Service Charge

Select the Service Charge that is automatically applied to transactions in this Zone or Location. The drop-down list displays only Service Charges that are programmed as preset-percentage Service Charges.

Tender/Media

A **Tender/Media**, sometimes written **Tender Media** or just **Tender**, is a form of payment or a service total used on Guest Checks or Customer Receipts. In the EMC, the term Tender/Media refers to the Tender/Media module, or a single Tender/Media database record. The following items are examples of Tender/Media records: Cash, Visa, MasterCard, Room Charge, Send, Print, Paid In, Paid Out.

A **corresponding article** for this topic exists in the Data Access namespace.

This article relates to programming of an EMC module.

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses **configuration**, or various programming scenarios, or both.

Contents

- 1 Tender/Media Types
- 2 Payment Tenders
- 3 See also

Tender/Media Types

Main Articles
Payment Tenders
Service Total
Pickup and Loan

1. **Payment**
   - Payment tenders are any tenders that reduce the balance of the check. Cash, Visa, MasterCard, Room Charge are all examples. A payment always acts as a service total as well.
2. **Service Total**
   - Service Total tenders end the current service round, sending Menu Items to Order Devices. A service total tender may also print a Guest Check. More information is available on the service total page.
3. **Pickup**
   - A pickup tender is often named "Paid Out". A pickup is a tender that means money is being withdrawn from a Cash Drawer. This type of tender is typically used in a restaurant where a manager likes to control the amount of money in a cash drawer (doesn't want it to get too high). In this environment, the manager will typically authorize the Paid Out and remove money from the drawer (and take the money to a safe or some other protected location).
4. **Loan**
   - A loan tender is often named "Paid In". A loan is a tender that means money is being added to the user bank or Cash Drawer. This type of tender is typically used in a restaurant when a bartender (or other operator with a cash drawer) is low on money, and they need more so that they are able to make change.

See also

Tender/Media	**Tender/Media** · Pickup and Loan · Report Group · Service Total · Tender Parameters
Learning series: Tender/Media	

Guide to Distributing Third Party Credit Card Driver CAL Packages

General Information

About This Document

This document provides the steps necessary to distribute a third party credit card driver package for use with MICROS Simphony v2.6.

Declarations

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Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version	Comments
Rev A	July	2013	2.5.3	Created document for Professional Services with Procedures for Distributing Third Party Credit Card Driver Package.
Rev B	February	2014	2.6.0	Updated document.procedures to refer to new CAL package instructions for v2.6.
Rev C	March	2014	2.6.0	Updated step 5 on page 6 with new procedure and removed the rest of the steps (see TPID# 56697).

Contents

To help you navigate the document, information is organized in sections and displayed in the following sequence:

Who Should be Reading This Document 4

What the Reader Should Already Know 4

Distribution of Third Party Credit Card Driver Package 5

Who Should be Reading this Document

This document is intended for the following audiences:

- MICROS Installers/Programmers/System Test Associates
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of POS terminology and concepts
- Working knowledge of the Microsoft Windows interface
- Understanding of basic network concepts

Distribution of Third Party Credit Card Driver Package

Custom third party credit card payment device drivers are not automatically installed during Simphony EMC installation. Consequently, the configuration for these third party drivers is not available in EMC. In order for any third party payment device drivers to be properly configured in EMC (Payments module, Payment Drivers module, and Payment Device module), the appropriate third party payment .DLL files must be manually copied to the correct installation directories on the Application Server where Server EMC or Remote EMC is installed.

The procedures in this document should be completed upon receipt of an edited third party credit card driver package.

Copy Files

1. After you receive the CreditDriverPackage.zip package back from the third party vendor, unzip it to a desired location.

2. Copy the CreditCardDrivers2.0 folder from the \CreditDriverPackage\CE directory and place it in the following folders on the Application Server:

   - \MICROS\Simphony2\EgatewayService\CAL\WS5A\Packages
   - \MICROS\Simphony2\EgatewayService\CAL\WS5\Packages

3. Copy the CreditCardDrivers2.0 folder from the \CreditDriverPackage\WIN32 directory and place it in the following folder on the Application Server:

   - \MICROS\Simphony2\EgatewayService\CAL\Win32\Packages

4. Open the CreditCardDrivers2.0 folder in the \MICROS\Simphony2\EgatewayService\CAL\Win32\Packages directory and copy all of the files to the following directories on the Application Server, with the exception of the Setup.dat file.

   - \MICROS\Simphony2\EgatewayService\handlers

- \MICROS\Simphony\EgatewayService\Download\EMCClient

***Note**: Do NOT copy the Setup.dat file to these directories.*

5. Copy the correct third party payment .DLL files to the appropriate installation directory on the Application Server where Server EMC or Remote EMC is installed.

   - **Server EMC** – Copy custom DLLs to \MICROS\Simphony2\EgatewayService\handlers
   - **Remote EMC** – Copy custom DLLs to \MICROS\EMC\EMCClient

Create CAL Package

A CAL package will need to be created in EMC. The CAL distribution process has changed with Simphony v2.6. Please refer to the ***New_CAL_2.x.pdf*** document (located on the MICROS secure FTP site and the Simphony Wiki) for instructions to create and upload the CAL package.

Time Card

A **Time Card** is a printed copy of an employee's clock in cycles for the current pay period.

A **corresponding article** for this topic exists in the Data Access namespace.

This article discusses the usage of one or more **Function Keys**. (834)

This article discusses general MICROS knowledge and/or **terminology**.

This article discusses time and attendance features or functionality.

Contents

- 1 Reprint Time Card
  - 1.1 Example
  - 1.2 Workstation Operations

Reprint Time Card

By default, Time Cards print when an operator clocks out. An operator is also able to reprint a time card by using the **[Reprint Time Card]** function key (834). This function is typically used to replace a lost or damaged time card. When a time card is reprinted, all clock in and out entries for the current pay period are printed.

To use th Reprint Time Card function key, an employee must be associated with an employee role with the **[Authorize/Perform Reprint of Time Card]** option enabled.

Example

A time card (shown below) provides the following information:

- Employee number and the employee's last and first name.
- The date and time of each clock in and clock out and whether or not it is a break.
- A clock detail count that records each complete clock-in/out cycle.

```
2002  Server2, Suzie
Timecard # 1              Page 1
--------------------------------
1  IN  TUE  APR03  7:03AM
       2002  2  Server
1  OUT TUE  APR03  9:35AM
       2002           2.53/2.53
2  IN  TUE  APR03 11:52AM
       2002  2 Fast Trans Cashr
       110/No Schedule
       9993 Manager Smith
2  OUT TUE  APR03  8:05PM
       2002          22.71/22.71
       110/No Schedule
       9993 Manager Smith
3  IN  WED  APR04  9:15AM
       2002  2  Server
3  OUT WED  APR04  3:32PM
       2002           6.28/28.99
4  IN  THU  APR05  3:57PM
       2002  2  Server
       110/No Schedule
       9993 Manager Smith
4  OUT THU  APR05  9:42PM
       2002           1.04/30.03
       109/Mngr Clock Out
       9993 Manager Smith
5  IN  TUE  APR10  8:47AM
       2002  2  Server
5  OUT TUE  APR10 11:59AM
       2002         91.87/121.90
       110/No Schedule
       9993 Manager Smith
6  IN  WED  APR11  8:48AM
       2002  8 Fast Trans Cashr
6  OUT WED  APR11  3:04PM
       2002          3.57/125.47
7  IN  FRI  APR13  5:23AM
       2002  8 Fast Trans Cashr
       110/No Schedule
       9993 Manager Smith
7  OUT FRI  APR13 11:27AM
       2002         74.15/199.62
       110/No Schedule
       9993 Manager Smith
8  IN  WED  APR25 10:55AM
       2002  2 Server
8  OUT WED  APR25  4:51PM
       2002          30.89/30.53
9  IN  WED  MAY09  5:52AM
       2002  2 Server
9  OUT WED  MAY09  1:20PM
       2002          55.48/85.99
10 IN  FRI  MAY11  1:43PM
       2002  8 Fast Trans Cashr
```

Workstation Operations

1. The **[Reprint Time Card]** function should be accessed from the user's Default Transaction Screen. Typically, this key is made available to manager employees only.
2. When the key is is pressed, the workstation prompts, `Reprint timecard, enter ID number`
3. The manager needs to enter the employee's ID or swipe the employee's Mag Card.
4. The time card for the employee prints at the workstation's Employee Time Card Printer.

Time Chit

A **time chit** is a piece of paper that prints and shows a single clock-in or clock-out record when an employee clocks in or out. A time chit consists of the date and time, clock-in status, the job code, the hours/minutes worked, and the pay accrued.

This article discusses general MICROS knowledge and/or **terminology**.

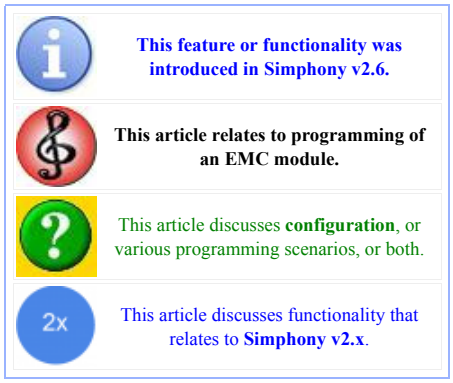
This article discusses time and attendance features or functionality.

Time chits provide a “validation” style record of a single time clock action. These may be issued if the employee wishes to keep a record of his time clock activity for personal record-keeping purposes. Some restaurants use time chits as a verification of clock-in status. For example, employees may be required to present a time chit to show that they are clocked in (or out) in order to receive an employee meal.

Tip Sharing Modifying and Monitoring

Contents

- 1 Understanding Tip Track
- 2 Roles and Responsibilities
- 3 Configuring Tip Track
  - 3.1 Page designing
  - 3.2 Privileges
  - 3.3 RVC configuration
- 4 Using Tip Track
  - 4.1 Tipping out
  - 4.2 Editing tip-outs given by the signed-in employee
  - 4.3 Editing the tip-outs given by other employees
- 5 Generating Tip Track reports
  - 5.1 Workstation Reports
    - 5.1.1 Employee Tip Track report
    - 5.1.2 Employee Journal Report
  - 5.2 mymicros Reports
    - 5.2.1 Employee Tip Track Summary Report
    - 5.2.2 Employee Tip Track Detail Report
- 6 Tip tracking when the workstation is offline



Understanding Tip Track

With Tip Track:

Servers can

- Share tips (tip-out) with other employees.
- Edit tip-outs.
- Claim tips from other employees.

Managers can

- Grant tip-out privileges.
- Generate tip-out transaction reports.

You cannot use Tip Track when mylabor is enabled.

Roles and Responsibilities

If you are a:	You need to read:
Programmer, Manager, Server	Understanding Tip Track
Manager, Server	Tip tracking when the workstation is offline
Manager	Privileges, Generating Tip Track reports

Programmer	Page designing
Server	Using Tip Track

Configuring Tip Track

Page designing

You need to add the following tip track function keys from the Page Design module.

Function key	Description
Tip Track Tip Out	Declare tips on behalf of another employee
Tip Track Edit My Tips	Edit tip-outs given by the signed-in employee
Tip Track Edit	Edit tip-outs given by other employees

Privileges

To use the Tip Track functions, enable the following options for the roles assigned to the employees.

Enterprise > **Configuration tab** > **Roles** > **Operations**

Option	Allows employee to:
187 - Authorize/Perform the Pay Tip Out to Others Keys	Give cash tips to others.
188 - Claim Tips From Other Employee	Receive a tip from another employee. Appears in the Select Employee dialog box displayed by the Tip Track Tip Out function.
189 - Authorize/Perform Edit of Any Tip Outs	Edit cash tips given to other employees.
31045 - Run Employee Tip Track Report	Run the Employee Tip Track Report.

RVC configuration

Revenue center > **Setup** tab > **RVC Parameters** > **Options** tab

Option	Description
7 - Validate Employee Direct/Indirect Tips Declared Transactions	If enabled and a validation printer is assigned from the **Workstations** > **Printers** tab, a validation receipt is printed whenever a tip-out or tip edit operation is committed.

Using Tip Track

Tipping out

1. Click **Tip Track Tip Out**.
2. Enter a tip out amount and click **Ok**.

3. From the **Select Employee** dialog box, select the employee to tip-out. The **Select Employee** dialog box shows only the employees with the **[188 - Claim Tips From Other Employee]** role privilege.
4. Click **OK**.

5. Click **Yes**.
6. If you want to share the tip with another employee, click **Yes** when prompted and repeat steps 2-5.

Editing tip-outs given by the signed-in employee

1. Click **Tip Track Edit My Tips**.
2. From the **Select The Tip To Adjust** dialog box, select a tip transaction.
3. If you want to revise the tip amount:
    1. Click **Edit Tip Amount**.
    2. Enter the new tip amount and click **Ok**.
4. If you want to change the receiving employee:
    1. Click **Edit Employee**.
    2. Select a new receiving employee from the list and click **Ok**.

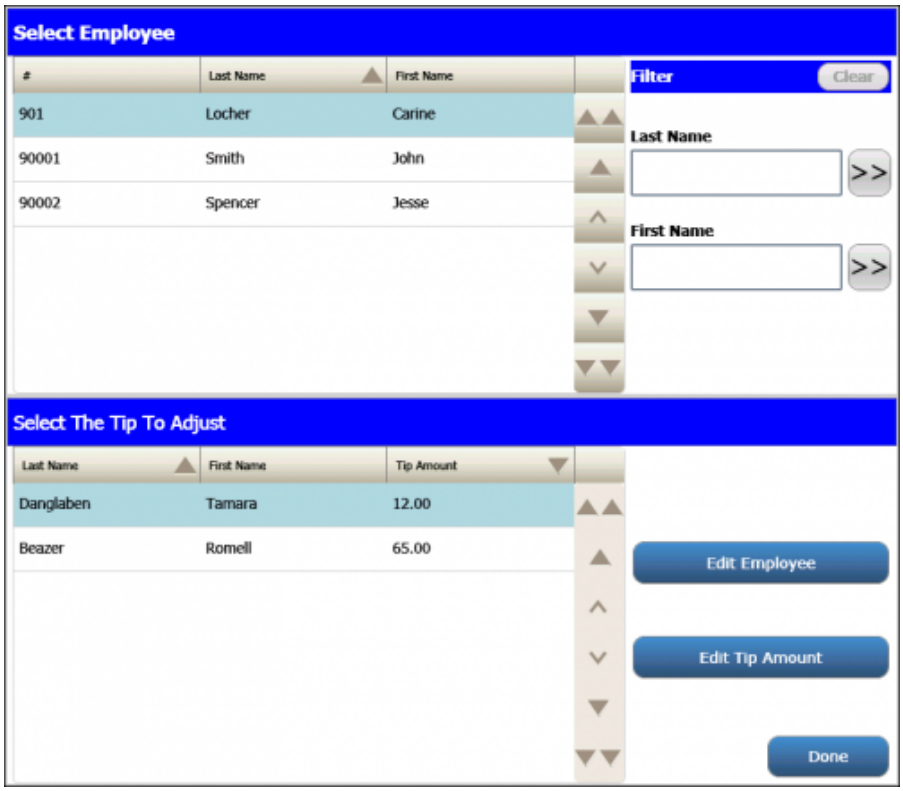
3. Click **Yes**.

5. Click **Done**.

Editing the tip-outs given by other employees

1. Click **Tip Track Edit**.

2. From the **Select Employee** dialog box, select the employee that shared the tip. The **Select The Tips To Adjust** dialog box shows the employees that received the tip.



3. From the **Select The Tip To Adjust** dialog box, select a tip transaction.

4. If you want to revise the tip amount:

    1. Click **Edit Tip Amount**.

    2. Enter the new tip amount and click **Ok**.

5. If you want to change the receiving employee:

    1. Click **Edit Employee**.

    2. Select a new receiving employee from the list and click **Ok**.

    3. Click **Yes**.

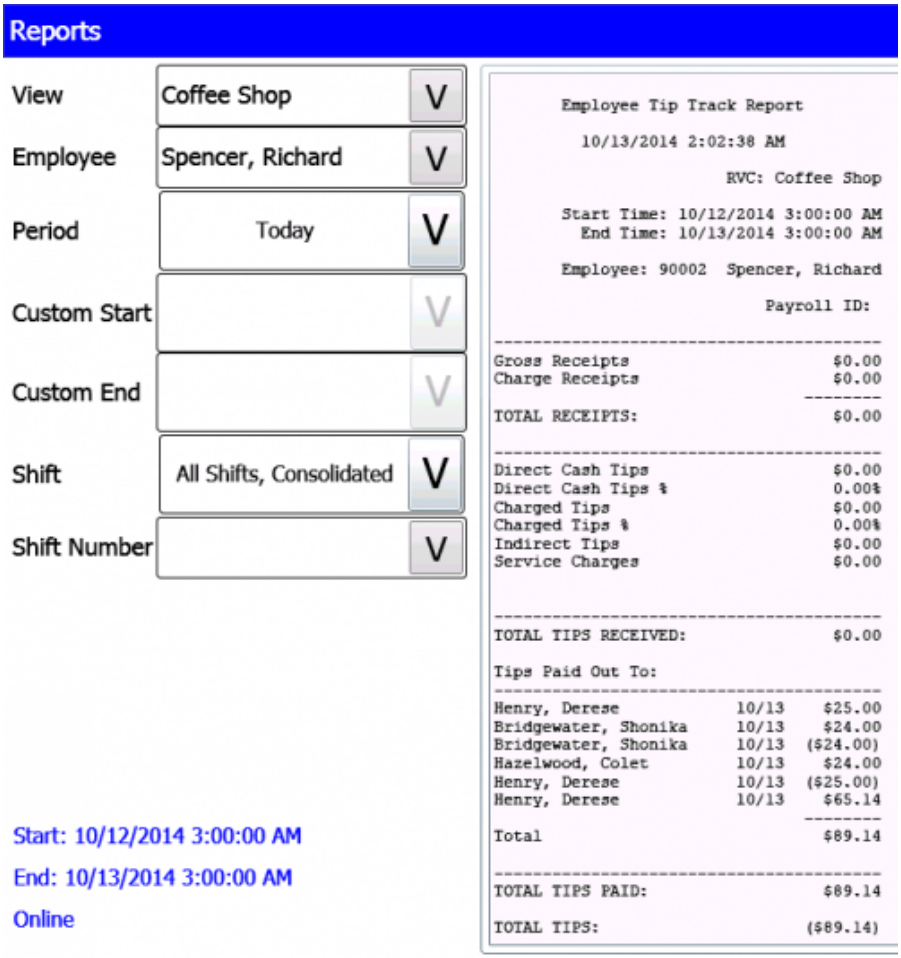
6. Click **Done**.

Generating Tip Track reports

Workstation Reports

Employee Tip Track report

Employee Tip Track report shows the tip-outs and the tip adjustments made by an employee.



Employee Journal Report

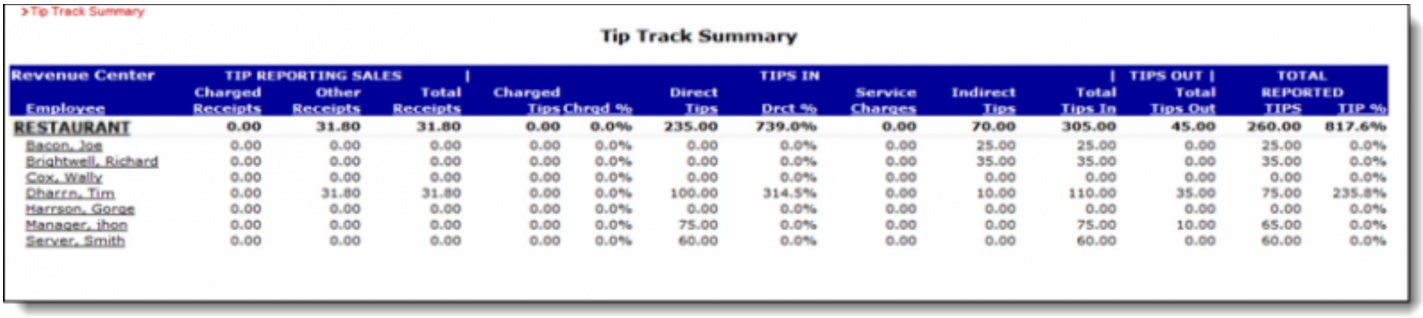
Tip-outs and tip edit transactions are posted to the Employee Journal Report.

```
        Employee Journal Report

         10/13/2014 2:27:53 AM

                                RVC: All

       Start Time: 10/12/2014 3:00:00 AM
         End Time: 10/13/2014 3:00:00 AM

               Employee: 3  Charles, Eda

========================================
CHK 8                                GST 0
3 Charles
TRN 17/8              OCT13'2014 2:24AM
             Beach Hotel
             Coffee Shop
----------------------------------------
               Dine In
25 Red Bliss Potato             162.50
 2 Kids Waffles                  24.00
 3 Breakfast Buffet              66.00
 5 Key Lime Pie                  32.50
   Cash                         285.00
   Subtotal                     285.00
   Payment                      285.00
========================================

CHK 8                                GST 0
3 Charles
TRN 18/8              OCT13'2014 2:24AM
             Beach Hotel
             Coffee Shop
----------------------------------------
               Dine In
========================================

TRN 19/0              OCT13'2014 2:24AM
             Coffee Shop
----------------------------------------
3 Charles, Eda
Indirect Tips        12.00
Tip Posted To 906 Beazer, Romell
========================================

TRN 20/0              OCT13'2014 2:25AM
             Coffee Shop
----------------------------------------
3 Charles, Eda
Indirect Tips        14.00
Tip Posted To 202 Danglaben, Tamara
========================================

TRN 21/0              OCT13'2014 2:25AM
             Coffee Shop
----------------------------------------
3 Charles, Eda
Tip Track Edit      -12.00
Tip Track Edit       14.50
Tip Posted To 906 Beazer, Romell
========================================
```

mymicros Reports

Employee Tip Track Summary Report

The mymicros.net Tip Track Summary Report provides a summary of tips received by all employees in a property by the revenue center.



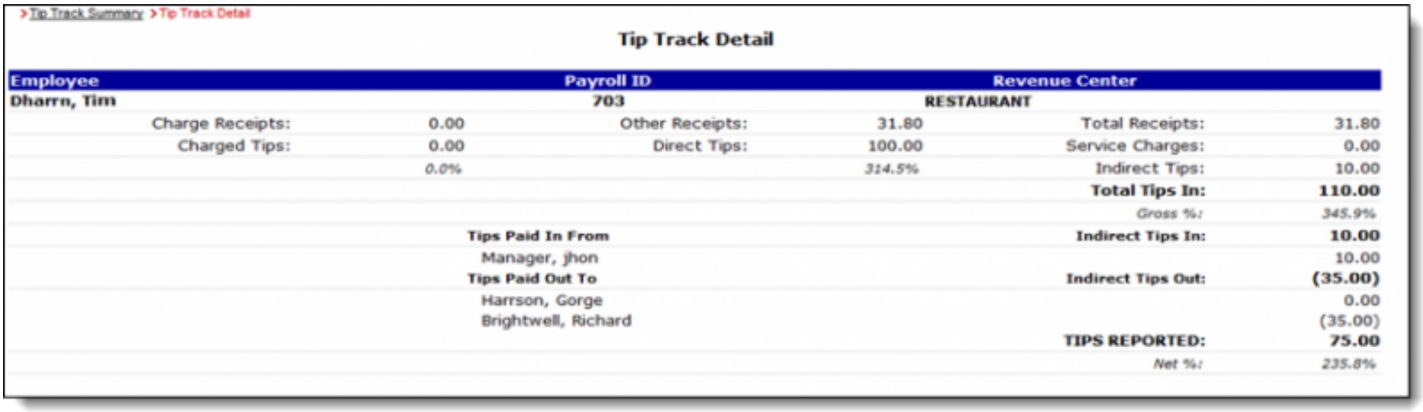
> Tip Track Summary

Tip Track Summary

Revenue Center / Employee	TIP REPORTING SALES Charged Receipts	Other Receipts	Total Receipts	Charged Tips	Chrgd %	TIPS IN Direct Tips	Drct %	Service Charges	Indirect Tips	Total Tips In	TIPS OUT Total Tips Out	TOTAL REPORTED TIPS	TIP %
RESTAURANT	**0.00**	**31.80**	**31.80**	**0.00**	**0.0%**	**235.00**	**739.0%**	**0.00**	**70.00**	**305.00**	**45.00**	**260.00**	**817.6%**
Bacon, Joe	0.00	0.00	0.00	0.00	0.0%	0.00	0.0%	0.00	25.00	25.00	0.00	25.00	0.0%
Brightwell, Richard	0.00	0.00	0.00	0.00	0.0%	0.00	0.0%	0.00	35.00	35.00	0.00	35.00	0.0%
Cox, Wally	0.00	0.00	0.00	0.00	0.0%	0.00	0.0%	0.00	0.00	0.00	0.00	0.00	0.0%
Dharrn, Tim	0.00	31.80	31.80	0.00	0.0%	100.00	314.5%	0.00	10.00	110.00	35.00	75.00	235.8%
Harrson, Gorge	0.00	0.00	0.00	0.00	0.0%	0.00	0.0%	0.00	0.00	0.00	0.00	0.00	0.0%
Manager, jhon	0.00	0.00	0.00	0.00	0.0%	75.00	0.0%	0.00	0.00	75.00	10.00	65.00	0.0%
Server, Smith	0.00	0.00	0.00	0.00	0.0%	60.00	0.0%	0.00	0.00	60.00	0.00	60.00	0.0%

Employee Tip Track Detail Report

To see a drill-down report for a revenue center or an employee, click a revenue center or an employee name on the Tip Track Summary report.



> Tip Track Summary > Tip Track Detail

Tip Track Detail

Employee	Payroll ID	Revenue Center
Dharrn, Tim	**703**	**RESTAURANT**

Charge Receipts:	0.00	Other Receipts:	31.80	Total Receipts:	31.80
Charged Tips:	0.00	Direct Tips:	100.00	Service Charges:	0.00
	0.0%		*314.5%*	Indirect Tips:	10.00
				Total Tips In:	**110.00**
				Gross %:	*345.9%*
	Tips Paid In From			**Indirect Tips In:**	**10.00**
	Manager, jhon				10.00
	Tips Paid Out To			**Indirect Tips Out:**	**(35.00)**
	Harrson, Gorge				0.00
	Brightwell, Richard				(35.00)
				TIPS REPORTED:	**75.00**
				Net %:	*235.8%*

Tip tracking when the workstation is offline

You can perform Tip Track operations even when the workstation cannot communicate with the enterprise (when the workstation is in offline mode). All operations are then recorded within the check and posting service (CAPS). Once the workstation is in online mode, the CAPS forwards the data to the enterprise.

TMS Reports

Contents

- 1 Overview
  - 1.1 Table Request Reports
  - 1.2 Filtering Report Results
  - 1.3 Configuration of TMS Reports
- 2 See also

This feature or functionality was introduced in Simphony v2.6 GR.

This article discusses functionality or configuration of an interface.

This article discusses behavior that is important for **Reporting**.

Overview

Table Management System (TMS) Reports are available in the mymicros.net portal. The reports, taken in their entirety, enable users to identify, track, and monitor a table seating request from inception through seating to checkout. These reporting capabilities enable users to make informed decisions to better manage staff, reservations, and the entire guest dining experience.

Table Request Reports

The six types of reports available to authorized users are described below. These reports can be accessed in mymicros.net by navigating to *Reports-> More Reports-> **Table Requests***.

Reservations Summary
: This report provides a list with basic information for all guests with a reservation that have yet to be served. Reservations are listed in chronological order by the date and time that the guest will arrive, starting with the earliest. The report includes Table Request information as well as guest contact information.

Reservations Detail
: By selecting the Guest Name in the Reservations Summary report, users can drill down to view additional detail for all guests with a reservation that have yet to occur. Reservations are listed in chronological order by the date and time that the guest will arrive. This report also includes the guest account numbers, how the reservation was made, updates, and an area for notes.

Cancelled Reservations
: The Cancelled Reservation report provides a list with basic information for all reservations that were cancelled. Reservations are listed in chronological order by the date and time that the guests were scheduled to arrive. It also includes Covers and guest contact information.

Tables and Seating
: This report provides details regarding the total customer experience for guests who requested a table. The report includes the following information: guest name, table preferences, time greeted/seated, and guest count. It also includes Turn Time and total paid.

Table Speed of Service

The Speed of Service report provides information on how quickly guests were served throughout their visit. Guests are listed in chronological order by the date and time that the guest was greeted. It also includes Turn Time, total amount paid, and the Employee serving the guest.

Table Request Variance
: This report provides a variety of totals and information about the experience of customers waiting to be seated. It includes the customer's name, time quoted for seating, wait variance, check number, table, cover count, turn time, payment total, and server.

Filtering Report Results

Depending on the report, users have the following methods of limiting or expanding the results returned during the execution of the report:

- **Group Sorting**: The sorting of groups display in a report may be changed by defining groups, such as location, RVC, Source, Dining Table Class, and Serving period.
- **Filters**: Filtering will enable Users to filter result sets by date, property, RVC, Guest VIP status, cancellation status, and cover count.
- **Detail**: The report drill downs provide quick and easy access to the underlying details of the information for additional analysis and research.

Configuration of TMS Reports

The six reports must be assigned to a User Role in mymicros.net before they can be accessed by authorized users. (Typically a Sys Admin assigns the reports to a User Role.)

To assign a report to a Role

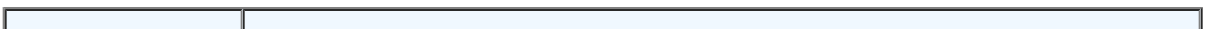
1. Navigate to *Admin-> Warehouse-> Reports-> **Report Roles***.
2. Highlight a Role and click **Select**.
3. On the Role Reports screen click **Add**.
4. Select the report name(s) from the list.
5. Click **Save**.

The Sys Admin must also create a Report Category. To create a Report Category

1. Navigate to *Admin-> Warehouse-> Reports-> **Report Categories***.
2. Click **Add**.
3. On the Report Categories screen enter the Name of the new report category, a Description, and specify a Sort Order.
4. Click **Save**.

See also

Articles in this category are part of the learning series for TMS. Articles in this learning series use the following navbox: Template:Nb tms



TMS	· Alerts · Dining Table Status · Dining Tables · Gesture Support · Host Command Area · Reservation Periods · Reservations Management · Seating Section Layout · Table Management General Configuration · TMS · TMS Parameters · **TMS Reports** · Wait List Management
Learning series: TMS	

VisaD Payment Card Driver Configuration Guide

General Information

About This Document

This document provides the steps necessary to implement the VisaD payment card driver for use with MICROS Simphony v2.6.

The Simphony payment configuration settings are dependent on the third party payment card software which the property is using ($$$ on the Net, CAPMS, Fusebox, or VisaD).

All aspects of the payment card driver configuration are maintained in the EMC module within Simphony.

Declarations

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Printing History

Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Version	Comments
Rev A	September	2012	2.5.0	Configuration introduced with Simphony v2.5.
Rev B	July	2013	2.5.3	Updated document with instructions for new loadable VisaD payment driver, available with Simphony v2.5 MR3. Added Professional Services Procedures for Distributing Third Party Credit Card Driver Package (Appendix A).
Rev C	September	2013	2.5.4	Updated information regarding Host Timeout value on page 8.
Rev D	January	2014	2.6.0	Updated document for v2.6. The Third Party Credit Card Driver Package procedures were moved to a stand alone document as they can be utilized by all third party payment card drivers.

Contents

To help you navigate the document, information is organized in sections and displayed in the following sequence:

Who Should be Reading This Document 4

What the Reader Should Already Know 4

Simphony Setup Procedures 5

Who Should be Reading this Document

This document is intended for the following audiences:

- MICROS Installers/Programmers/System Test Associates
- MICROS Dealers
- MICROS Customer Service
- MICROS Training Associates
- MIS or IT Associates

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

- Operational understanding of PCs
- Understanding of POS terminology and concepts
- Working knowledge of the Microsoft Windows interface
- Understanding of basic network concepts

Simphony Setup Procedures

Before You Begin

Before configuring the VisaD payment driver, the following should be noted:

- Simphony v2.6 must be installed at the property.
- You must have access to the EMC module within Simphony.
- Any custom payment or device drivers that will be utilized must have been implemented. Please refer to the *Guide to Distributing Third Party Credit Card Driver CAL Packages* for instructions.

EMC Configuration

Overview

This section provides instructions to configure the following payment card driver for use with Simphony v2.6:

- VisaD

All aspects of the payment card driver configuration are maintained in the EMC module within Simphony. You will need to configure the payment card driver and payment card module, and then configure the screen/button design for Front of House (FOH) usage.

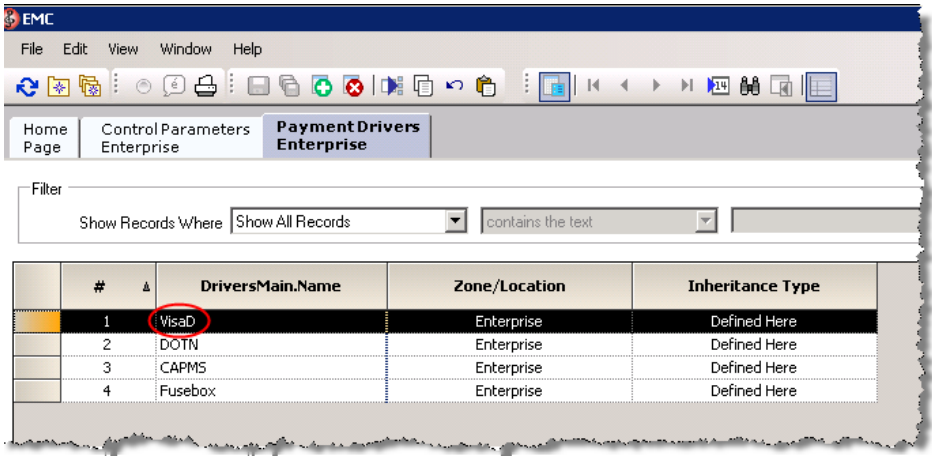
Payment Driver Configuration

Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Payment Drivers**.

3. Add a new record for the VisaD driver using the green Insert Record button (if it does not already exist).



4. Open the new driver, and then click the link called '**Import from a file**'.

5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**VisaDPayment.dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:

Assembly/Class	
Assembly Name	VisaDPayment.dll
Category And Type	
Class Name	Micros.Payment.CreditCardDrivers.LoadableVisaDPaymer
Description	**VisaD Payment Driver**
Display Name	**[Processor Name]**
Driver ID.	**VISAD**

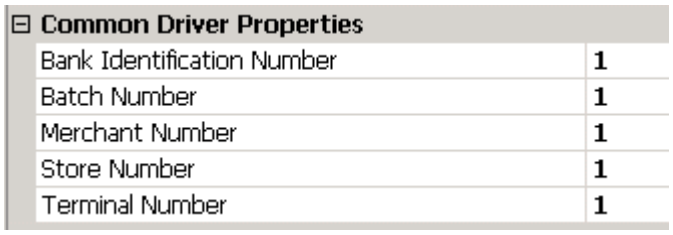
- **Description -** This value describes the Payment Driver.

- **Display Name -** This value appears in the Driver display drop-down list (e.g., MerchantLink).

- **Driver ID -** This is for internal use only. Use '**VISAD**' unless instructed otherwise.

Common Driver Properties

9. In the Common Driver Properties section, enter information in the following fields:



Common Driver Properties	
Bank Identification Number	**1**
Batch Number	**1**
Merchant Number	**1**
Store Number	**1**
Terminal Number	**1**

- **Bank Identification Number -** This value cannot be 0 (zero) or empty. Set to '**1**'.

- **Batch Number -** This value cannot be 0 (zero) or empty. Set to '**1**'.

- **Merchant Number -** This value cannot be empty. Set to '**1**'.

- **Store Number -** This value cannot be 0 (zero) or empty. Set to '**1**'.

- **Terminal Number -** This value cannot be 0 (zero) or empty. Set to '**1**'.

Transport Service Properties

10. In the Transport Service Properties section, enter information in the following fields:

Transport Service Properties	
Host Timeout	**60**
Primary Host	**[URL of application]**
Primary Host Port	**[Port number for Primary Host]**
Request URI	**/Micros/process_transaction.cgi**
Secondary Host	**[URL of application]**
Secondary Host Port	**[Port number for Secondary Host]**

***Note**: Field descriptions below include the recommended value for use of the VisaD driver with the MerchantLink payment provider. For any other providers utilizing the VisaD driver, please refer to their documentation for instructions.*

- **Host Timeout -** This value cannot be empty. The recommended value is '**60**' seconds. If the Host Timeout value is configured to '**0**' or a negative value, a default of '**30**' seconds will be used instead. Note that currently this only applies to Win32 systems; it is not possible to change the timeout from the default setting of '100' seconds on Windows CE clients.
- **Primary Host -** The URL of the payment provider application. For MerchantLink use '**g1.merchantlink.com**'.
- **Primary Host Port -** Port number utilized for Primary Host above. For MerchantLink use '**443**'.
- **Request URI -** The Uniform Resource Identifier for the payment provider application if utilized. For MerchantLink use '**/Micros/process_transaction.cgi**'.
- **Secondary Host -** The URL of the payment provider application. For MerchantLink use '**g2.merchantlink.com**'.

- **Secondary Host Port -** Port number utilized for Secondary Host above. For MerchantLink use '**443**'.

VisaD Driver Properties

11. In the VisaD Driver Properties section, enter information in the following field:

VisaD Driver Properties	
Agent Bank Number	
Agent Chain Number	
City Code	
Country Code	
Currency Code	
Enable Card Level Results	**False**
Enable POS Data Code	**False**
Include Exp Date And Extra Mag Card Data	**False**
Industry Type	
Language Indicator	
Max Batch Records	**9999**
Merchant Category	
Merchant Location	
Merchant Name	
Merchant State	
Send RFID Data	**False**
Time Zone	
VisaQ Compatibility	**False**

- **Max Batch Records -** Set this value to '**9999**'.
- Use the default values for all other pre-populated fields unless instructed otherwise.

12. Save your changes and close the Payment Drivers Enterprise tab.

Payment Device Configuration

In most cases the payment module will use devices (e.g., MSR, RFID) that are supported using the internal drivers for the input of payment card information. If this is the case, you may skip to the next section.

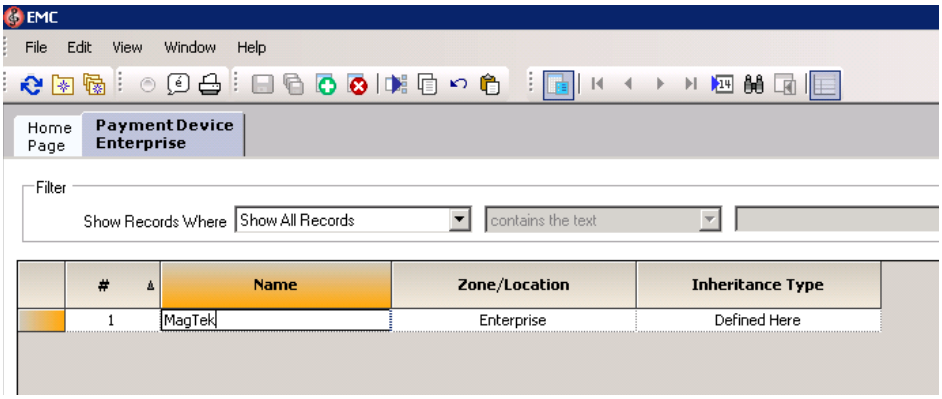
If the payment module will be utilizing a physical input device (MSR) that is not already supported as part of the Simphony POS, a custom device driver may have been created. A third-party device driver will be required to allow communications between the physical device and Simphony. Configure the device driver using the following instructions.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.

2. Navigate to **Setup tab | Payment Device**.

3. Add a new record for the device driver using the green Insert Record button (if it does not already exist).



4. Open the new driver, and then click the link called '**Import from a file**'.

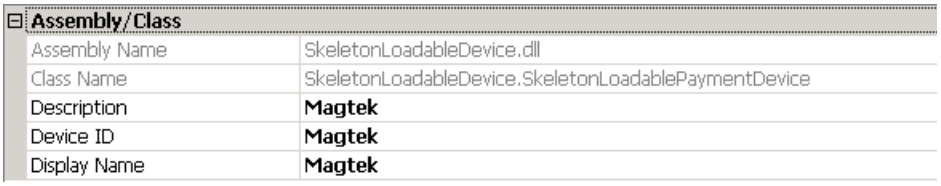
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**[3rdpartyprovider].dll**'.

6. Click the '**Open**' button.

7. Click the '**Configuration**' tab.

Assembly/Class

8. In the Assembly/Class section, enter information in the following fields:



   - **Description -** This value describes the Device Driver.
   - **Device ID -** This is for internal use only. It is recommended that this value match the device (e.g., Magtek350M).
   - **Display Name -** This value appears in the Device display drop-down list (e.g., MagTek).

9. Save your changes and close the Payment Device Enterprise tab.

Payment Module Configuration

Open the EMC application in Simphony and log in.

Enterprise Level Configuration

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Setup tab | Payments**.
3. Click the Credit Card payment record to open. If a payment record for Credit Cards has not been created, add it using the green Insert Record button.
4. Click the link called '**Import from a file**'.
5. Browse to C:\MICROS\Simphony2\EgatewayService\handlers and select '**Micros.Payment.LoadableCreditCardModule.dll**'.
6. Click the '**Open**' button.
7. Select the **Driver** from the drop-down list. If a payment driver was created in the previous steps, the display name of the driver will be shown here.
8. Select the **Device** from the drop-down list. This will default to '**Internal**', which is the value to use for all MICROS devices. If a device driver was created in the previous steps, the display name of the driver will be shown here.
9. Click the '**Configuratio**n' tab.

Common Properties

10. In the Common Properties section, enter information in the following fields:

Common Properties	
Allow Manual Authorization Credit Card	**True**
Allow Partial Settlement On Batch	**False**
Data Lifetime Seconds	**7200**
Default UI Element	
Do Not Batch	**False**
Encrypt Data	**True**
Log Level	**ALWAYS**
Manual Card Data Entry Retries	**5**
Offline Authorizations	**0**
Prompt For Manual Card Data Entry	**True**
Retry Authorization Reversals On Batch	**False**
Run As Service	**False**

- **Allow Manual Authorization Credit Card -** This indicates whether manual authorization of credit cards is allowed. Must be set to '**True**' for all processors using the VisaD driver.
- **Allow Partial Settlement On Batch -** Must be set to '**False**' for all processors using the VisaD driver.
- **Do Not Batch** - Determines if the creation and settlement of the Batch will be performed within Simphony. Must be set to '**False**' for all processors using the VisaD driver.
- **Encrypt Data -** Must be set to '**True**' for all processors using the VisaD driver.
- **Manual Card Data Entry Retries -** This indicates the number of manual card retries that will be allowed. Must be set to at least '**1**'. Recommended value of '**5**'.
- **Offline Authorizations -** This indicates the number of offline authorizations allowed before the system will attempt to go online.
- **Prompt For Manual Card Data Entry -** This indicates whether manual card entry is allowed. Must be set to '**True**' for all processors using the VisaD driver.

- **Retry Authorization Reversals On Batch -** Must be set to '**False**' for all processors using the VisaD driver.
- **Run As Service** - Must be set to '**False**' for all processors using the VisaD driver.

11. Save your changes and close the Payments Enterprise tab.

Property/Revenue Center Level Configuration

Configuration settings that are unique to the individual property or revenue center can now be defined.

1. In the Locations hierarchy, highlight the property module.
2. Navigate to **Setup tab | Payment Drivers**.
3. Double-click the '**VisaD**' **driver** row to open.
4. Click the '**Override this record**' link, and then click the '**Yes**' button.
5. Click the '**Configuration**' tab.

Transport Service Properties

Ensure that you have the Value Added Reseller (VAR) sheet from a VisaD payment processing vendor representative. The VAR sheet contains all of the property specific information.

6. If the values differ from those defined at the Enterprise level, then update the appropriate values based upon the VAR sheet. Otherwise, continue to the next step.

VisaD Driver Properties

7. In the VisaD Driver Properties section, enter information in the following fields:

VisaD Driver Properties	
Agent Bank Number	[See VAR sheet]
Agent Chain Number	[See VAR sheet]
City Code	[See VAR sheet]
Country Code	[See VAR sheet]
Currency Code	[See VAR sheet]
Enable Card Level Results	False
Enable POS Data Code	False
Include Exp Date And Extra Mag Card Data	False
Industry Type	[See VAR sheet]
Language Indicator	[See VAR sheet]
Max Batch Records	9999
Merchant Category	[See VAR sheet]
Merchant Location	[See VAR sheet]
Merchant Name	[See VAR sheet]
Merchant State	[See VAR sheet]
Send RFID Data	False
Time Zone	[See VAR sheet]
VisaQ Compatibility	False

- **Agent Bank Number** - See VAR sheet for value.
- **Agent Chain Number** - See VAR sheet for value.
- **City Code** - See VAR sheet for value.
- **Country Code** - See VAR sheet for value.
- **Currency Code** - See VAR sheet for value.
- **Industry Type** - See VAR for value.
- **Language Indicator** - See VAR sheet for value.
- **Merchant Category** - See VAR sheet for value.
- **Merchant Location** - See VAR sheet for value.
- **Merchant Name** - See VAR sheet for value.

- **Merchant State -** See VAR sheet for value.
- **Time Zone -** See VAR sheet for value.

8. Save your changes and close the Payment Drivers tab for your current level in hierarchy.

Configure Autosequence

The PC Autosequence feature may optionally be used to set up automatic event tasks, such as nightly batching. Once the PC Autosequence event has been created, it can be scheduled to run repeatedly at specific frequencies or time intervals.

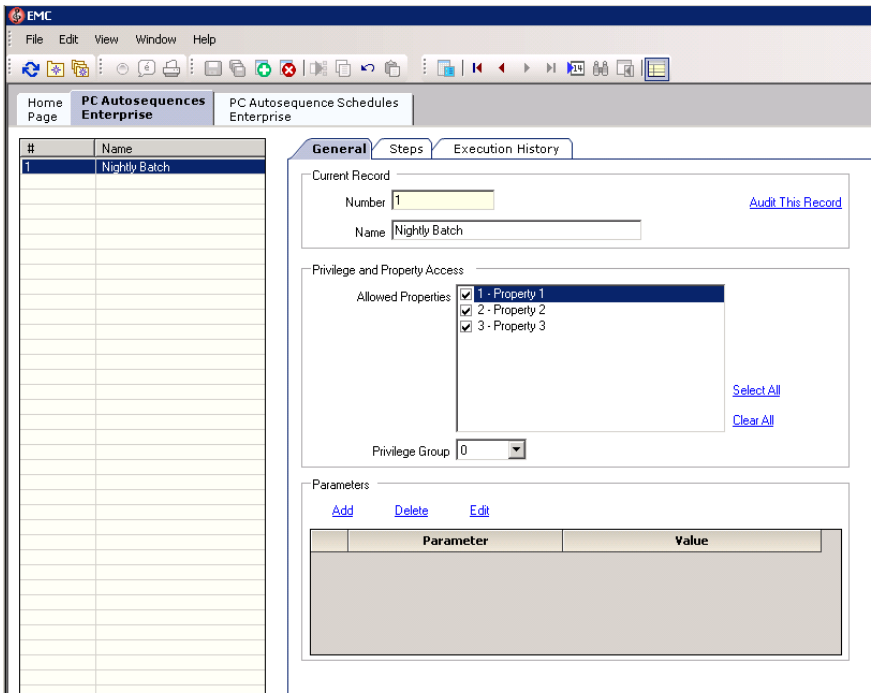
Create Autosequence Event

Autosequences may only be configured at the Enterprise level.

1. In the Locations hierarchy, highlight the Enterprise module.
2. Navigate to **Configuration tab | PC Autosequences**.
3. Add a new record for the autosequence event using the green Insert Record button (if it does not already exist).
4. Double-click on the row to open the new autosequence record.
5. Click the '**General**' tab.

Privilege and Property Access

6. In the Privilege and Property Access section, select information for the following fields:



- **Allowed Properties** - Check (enable) each property that is to be included in the autosequence event run.
- **Privilege Group** - If desired, select the employee group that will be granted privileges to run the autosequence event.

Parameters (optional)

To optionally restrict the execution of the autosequence event, complete the steps in the section below.

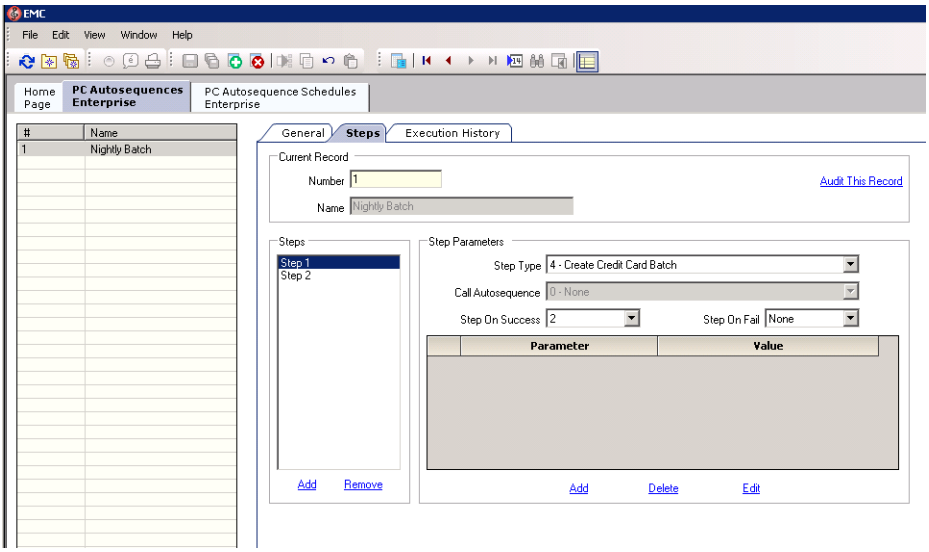
7. In the Parameters section, click the '**Add**' link.

8. Add the desired parameter(s) with values.

Autosequence Event Steps

9. Click the '**Steps**' tab.

10. Under the Steps section, click '**Add**' to add step 1 of the autosequence event.



11. In the Step Parameters section, select the **Step Type** from the drop-down list.

12. Under the Steps section, click '**Add**' again to add step 2 of the autosequence event.

13. Select the **Step Type** from the drop-down list.

14. Repeat to add each step required to run the autosequence event.

15. For each step, select the outcomes:

- **Step on Success** - Select the step number that should occur next if a step succeeds. For example, after step 1 runs successfully, then proceed to step 2.
- **Step on Failure** - Select the step number that should occur next if a step fails. For example, if step 1 fails, do not proceed with any other steps.

16. Once all steps have been added, save your changes and close the PC Autosequences Enterprise tab.

PC Autosequence Schedules

17. In the Locations hierarchy, highlight the Enterprise module.

18. Navigate to **Configuration tab | PC Autosequence Schedules**.

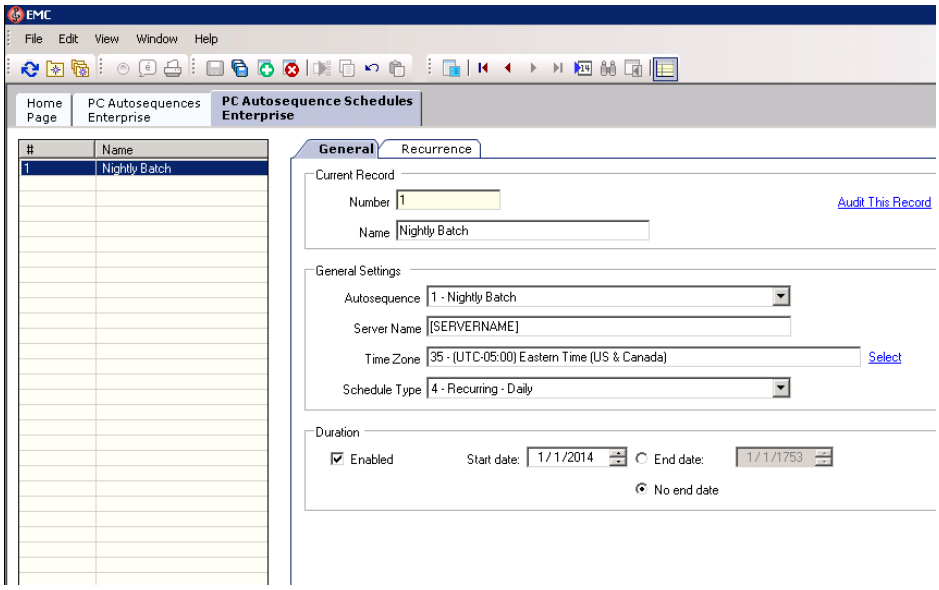
19. Add a new record for the autosequence schedule using the green Insert Record button (if it does not already exist).

20. Double-click to open the new autosequence schedule record.

21. Click the '**General**' tab.

General Settings

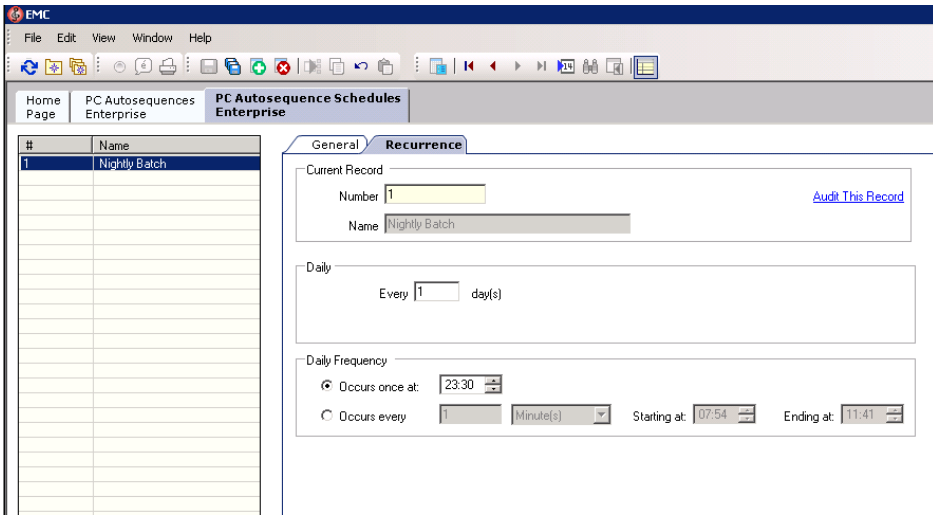
22. In the General Settings section, select information for the following fields:



- **Autosequence** - Select the desired autosequence event from the drop-down list.
- **Server Name** - Enter the name of the server located at the Hosting Center.
- **Time Zone** - Select the time zone of the Hosting Center.
- **Schedule Type** - Select the frequency for the autosequence event.
- **Duration** - The '**Enabled**' box must be checked in order for the autosequence event to run. Also, select the Start and End dates for the autosequence event.

Recurrence

23. Click the '**Recurrence**' tab.



24. In the Daily section, enter the number of day(s) for the autosequence event to reoccur. For example, to run the event daily, set this value to Every 1 day(s).

25. In the Daily Frequency section, set the time(s) for the autosequence event to run.

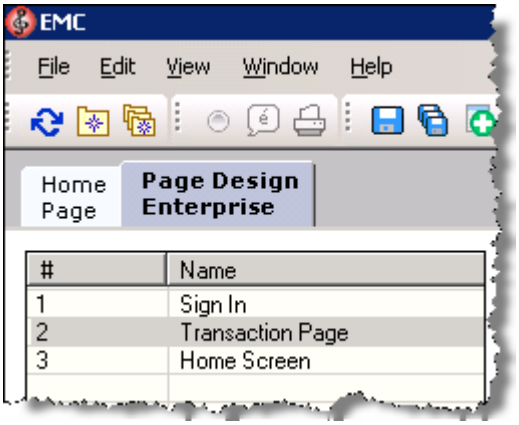
26. Save your changes and close the PC Autosequence Schedules Enterprise tab.

Screen Design Configuration

The instructions below explain how to set up the FOH screen and button(s) for use with the payment card driver.

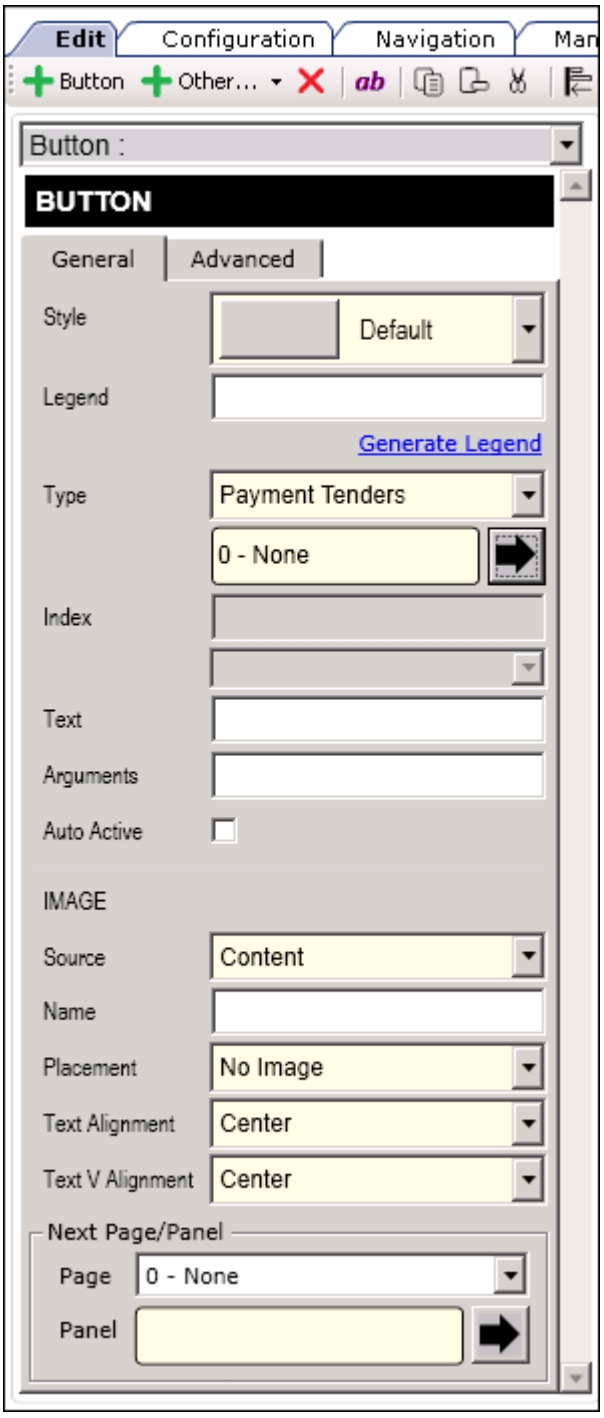
1. Open the EMC application in Simphony and log in.
2. Highlight the enterprise module.
3. Navigate to **Configuration tab | Page Design**.
4. Double-click the row of the desired page/screen to open it.

***Note**: The screenshots below depict a Transaction Page as the example. Your system will likely have a different page or screen name for the buttons.*



5. Click the Insert (+) button to add a new Credit Card function button for the payment card driver.

6. In the General tab select '**Payment Tenders**' from the Type drop-down.

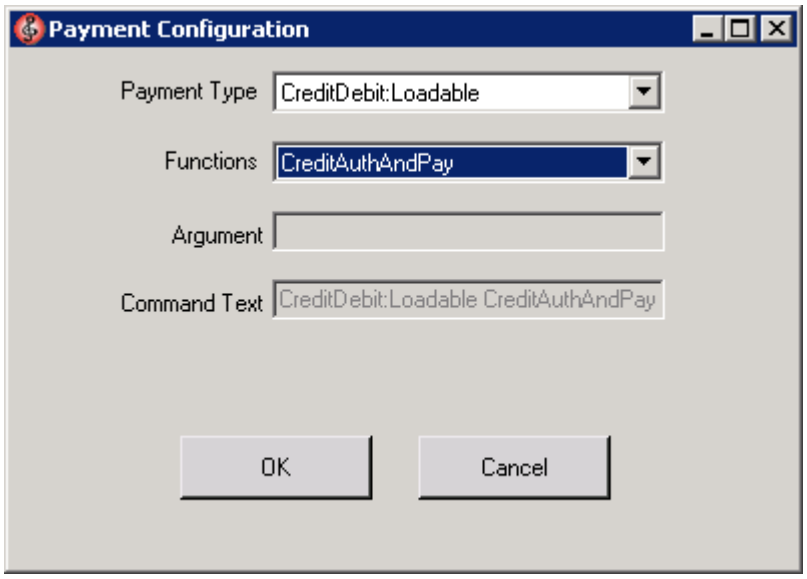


7. Directly under the Payment Tenders drop-down, click the black arrow.

8. On the *Select Tender/Media Payment* window, select '**None**' or the desired payment tender, and then click the '**OK**' button.

***Note**: If you want all types of credit cards to be used, select 'None'. Otherwise, select the desired payment tender and repeat steps 9-13 for each type of payment tender.*

9. On the *Payment Configuration* window, select '**CreditDebit:Loadable**' for the Payment Type and your desired function in the Functions drop-down list. Click the '**OK**' button.



10. Position and size the button wherever you want to place it on the FOH screen.

11. In the Legend field, type the name of the button.

12. Repeat for any additional supported functions.

13. Save your changes and close the Page Design Enterprise tab.

14. Restart the Ops client(s) in order for the screen design changes to display on the workstation(s).

Workstation Comparison Chart

From Wiki

This chart discusses the basic differences between the Workstation 4, Workstation 4 LX, Workstation 5, Workstation 5A, PCWS 2015, mTablet, and mWorkstation.

This article discusses a topic related to **hardware**.

This article discusses a **technical topic** that is not intended for all readers.

Note: Simphony version 2.6 supports the MagTeK IPAD and DynaPro Magnetic Card Readers/PIN-entry devices. These devices are *only* supported on Win32 Workstation clients, but *not* for workstation clients running Windows CE. Please consider this when reviewing the Magnetic Card Reader row in the following table.

Comparison Chart

Feature	WS4	WS4LX	WS5	WS5A	PCWS 2015	mTablet and mStation	mWorkstation
LED Light Color	Green (rectangle)	Blue (rectangle)	Blue (circle)	White (circle)	Green (circle)	Base status LED lit up when docked only	Blue (circle)
Form Factor	Low Profile 12.1" Touchscreen LCD with optional stand	Low Profile 12.1" Touchscreen LCD with optional stand Same casework and stand as WS4.	Low Profile 15" Touchscreen LCD with optional stand New stand not compatible with WS4LX	Low Profile 15" Touchscreen LCD with optional stand New stand not compatible with WS4LX	Low Profile 15" Touchscreen LCD with optional stand	Slim 6.9" x 11.5" profile. With stand, rests 10.62" off of surface.	Low Profile 15.6" Touchscreen with required stand
Processor	Geode SC3200	AMD LX800	AMD LX800	Intel Atom N450, Single Core, 1.6GHz processor with integrated memory and graphics controllers	IntelCeleron P4505 or Core i5-520	1GHz Dual Core Freescale i.MX6	Intel Atom E3827 Dual Core Hyperthreaded (1M Cache, 1.75GHz)
BIOS	None - Custom Bootloader	General Software BIOS ▪ Firmbase Application Environment	General Software BIOS ▪ Firmbase Application Environment	Phoenix EB(SF) Embedded BIOS with StrongFrame® Technology, and Firmbase® Technology. version: BIOS Q1000g	Dependent on sys board: **Revision C**: O1201r. **Revision C**: O1301. **Revision D**: O1301g.	General Software BIOS	Phoenix EB(SF) Embedded BIOS

Display / User Interface	12.1" TFT Display w/ 5-Wire Resistive Touchscreen	12.1" TFT Display w/ 5-Wire Resistive Touchscreen	15" TFT Display w/ 5-Wire Resistive Touchscreen ▪ Capacitive Option	15" TFT LCD (1024x768) 262K Colors Max	15" TFT LCD (1024x768) 262K Colors	10.1" WVGA (1024x600) TFT LCD. Portrait or Landscape orientation, Auto Rotating.	15.6" Widescreen (1920x1080 FHD), 5-wire capacitive option
Magnetic Card Reader	Integrated, 3 Track Standard	Integrated, 3 Track Standard	Integrated, 3 Track Option ▪ modular, field installable	3-Track ABA compatible, operates in MAGTEK and Special modes	3-Track ABA compatible	Modular Integrated 3-Track card reader capable of encryption at the swipe	Integrated, 3-track, modular, operates in MAGTEK and Special modes
Power Supply	Internal	Internal	100W, Internal	24W Typical	35W Typical	3.7V internal Li-Ion battery	Internal
Temp Range	0-45 °C	0-45 °C	0-45 °C	0°C (32°F) to 45°C (113°F), 90% relative humidity max	0°C (32°F) to 45°C (113°F), 90% relative humidity max	-10°C (14°F) to 60 °C (140°F)	0°C (32°F) to 50°C (122°F)
Operating System	Windows CE .NET 4.1, 4.2	Windows Embedded CE 6.0	Windows Embedded CE 6.0 MS Windows XP Embedded WEPOS Linux (variant to be determined)	Windows Embedded CE 6.0 R3 and Windows Embedded POSReady 2009	Options of both 32 and 64-bit versions Windows 7 Professional Embedded or Windows Embedded POSReady 2009	WEC7 (windows embedded compact 7)	Microsoft Windows Embedded 8.1 Industry Pros
Mass Storage	Disk on Chip - Primary Compact Flash - Secondary	USB Flash Dish (Internal Header) ▪ 128 MB - 4 GB Compact Flash - Secondary ▪ 128 MB - 8 GB CE Config ▪ 128 MB USB Flash ▪ 128 MB CF Standard	USB Flash (Internal Header) ▪ 128 MB - 4 GB Compact Flash - Secondary ▪ 128 MB - 8 GB CE Config ▪ 256 MB USB Flash ▪ 256 MB CF Standard XPE/WEPOS - 4 GB USB Flash Standard	2 Options ▪ Windows Embedded CE 6.0 R3: USB Hard Drive of 256MB or 512MB ▪ POSReady 2009: 4GB USB Hard Drive	Multiple Options ▪ 2 x 2.5" SATA Drive Bays (ships with 1 drive), SSDs available ▪ eUSB Flash drive port (used for addt'l storage) ▪ CF Card slot for addt'l storage or backup disk	4GB eMMC (BOOT), 8GB microSD Card (STORE)	MO 297 Slim SATA SSD 32GB
Memory	128 MB SDRAM (expandable to 256 MB) 1-slot	256 MB DDR RAM (expandable to 1 GB MB) 1-slot	256 MB DDR RAM (expandable to 2 GB MB) 2-slot ▪ XPE/WEPOS 512 MB Standard	1GB DDR3 SDRAM ▪ Windows Embedded CE 6.0 R3 are limited to 512MB ▪ Windows Embedded POSReady 2009 are shipped with 1G of RAM	single 2GB DDR3 SO-DIMM (expandable to 2)	1GB DDR3 SDRAM	4GB DDR3L 1333MHz Standard (can be expanded to 8GB)
Cooling	Passive - No Fans	Passive - No Fans	Passive - No Fans	Passive - No Fans	Passive - No Fans ▪ 60mm CPU fan ▪ 30mm System fan	Passive - No Fans	Passive - No Fans
Wireless Support	Optional via PCMCIA w/ External Antenna	Optional mini-PCI card w/ External Antenna	Optional mini-PCI card w/ Integrated Antenna	Optional mini-PCI w/ Wireless Options and 2010 Modem	Optional mini-PCI w/ 802.11 a/b/g/n Wireless Card	802.11 a/b/g/n WiFi with WPA WPA2, TKIP, AES support ▪ Bluetooth V2.01	Optional 802.11 a/b/g/n Dual Band Radio with Bluetooth 4.0

USB	2 USB v1.1	4 USB v2.0	6 USB v2.0 (4 available at I/O Panel)	Ten USB 2.0 ports ▪ Five internal ▪ Five external (Four USB type A, one optional powered USB). External USB ports can be disabled.	Fourteen USB 2.0 Ports ▪ Eight Internal ▪ Six external (Four USB type A, two MICROS Powered USB). External USB ports can be disabled.	4 USB 2.0 Ports	9 Total ▪ 2 USB 3.0 on Head, 1 USB 3.0 on Base ▪ 2 USB 3.0 on Head, 1 USB 2.0 12V Powered on Head, 3 USB 2.0 Internal
Serial Ports - Available	1 - DB9 pin RS232 2 - RJ45 RS232 ▪ 1-IDN or RS232	1 - DB9 pin RS232 2 - RJ45 RS232 ▪ 1-IDN or RS232	1 - DB9 pin RS232 2 - RJ45 RS232 ▪ 1-IDN or RS232	4 Ports: ▪ 1 DB9 RS232 Serial /w handshake ▪ 2 Modular RS232 Serial /w handshake ▪ 1 Modular RS422 or RS232 Serial (IDN)	4 Ports: ▪ 1 DB9 RS232 Powered Serial /w handshake ▪ 1 DB9 RS232 Serial /w handshake ▪ 1 Modular RS232 Serial /w handshake ▪ 1 Modular RS422/RS232 Serial (IDN)	4 Serial Ports. ▪ 1 RS232 DB9 /w Software Selectable 5/9/12V Power. ▪ 1 RS232 DB9 /w 12V Power ▪ 1 IDN - Switchable RS422/RS232 ▪ 1 RJ45 Serial	4 Total Standard: ▪ 2 RJ45 RS232 Powered (5/9/12V) ▪ 1 RJ45 RS232 ▪ 1 RJ45 RS422/RS232 IDN
Cash Drawer	2 - 12V MICROS DIN	2 - 12/24V MICROS DIN ▪ BIOS Selected	2 - 12/24V MICROS DIN ▪ BIOS Selected	2 - 12/24V MICROS DIN ▪ BIOS Selected	2 - 12/24V MICROS DIN ▪ BIOS Selected	2 MICROS Series 2 Cash Drawer Ports	2 MICROS Series 2 Cash Drawer 12/24V
Network	10/100BaseT Ethernet	10/100/1000BaseT Ethernet	10/100/1000BaseT Ethernet	10/100/1000BaseT Ethernet	10/100/1000BaseT Ethernet	10/100/1000 Wired Ethernet (mStation base only)	10/100/1G RJ45 Ethernet
Keyboard/Mouse	2 - PS2 Ports	USB	USB	USB	USB	USB	USB
Audio	N/A	Not Standard	Standard - Integrated Speakers	Standard - Integrated Speakers	Intel High Definition Audio		Intel HD Audio (Azalia) - 2 Integrated Stereo Speakers
Integrated Biometric	N/A	N/A	Integrated Fingerprint Reader - Option	Integrated Fingerprint Reader - Option	Integrated Fingerprint Reader - Option	N/A	N/A
Component Intelligence	Limited	Auto-senses LCD panel, MSR and other multi-vendor components	Auto-senses LCD panel, MSR and other multi-vendor components	Auto-senses LCD panel, MSR and other multi-vendor components	Auto-senses LCD panel, MSR and other multi-vendor components	Auto-senses LCD panel, MSR and other multi-vendor components	Auto-senses LCD panel, MSR and other multi-vendor components
Integrated Modem	N/A	N/A	Mini-PCI option - mutually exclusive with 802.11 card. *Win32 OS only. U.S. distribution only.*	The optional 2010 modem can only be used with POSReady 2009. The modem is not compatible with Windows Embedded CE 6.0.	The optional Mini-PCI Modem can be used with WIN32 operating systems, and is certified for use in North America.	N/A	N/A
Personality Module	Compact Flash	Compact Flash ▪ CE Only ▪ Same as WS4	Compact Flash ▪ CE Only	CF can be used in POSReady or CE	Compact Flash ▪ CE Only	MicroSD Card	N/A
Platform SW Recovery Method	Semi-Manual	Factory image recovery available through BIOS ▪ CE Only	Factory image recovery available through BIOS ▪ CE Only Optional CF based WEPOS Recovery Tool	▪ CE: WINCE Factory Restore of POSReady Image Recovery ▪ Requires optional POSReady Recovery CF	▪ WIN32 Factory Recovery requires an optional PCWS 2015 Recovery CF for each supported operating system, currently POSReady 2009	4GB eMMC flash device, called 'BOOT'	TBD

					and Windows 7 Professional.		
Rear Display Support	Integrated 240x64 Graphical LCD	Integrated 240x64 Graphical LCD	Integrated 240x64 Graphical LCD	Integrated 240x64 Graphical LCD	Integrated 240x64 LCD Customer Display	240x64 Graphics LCD & 2x20 text LCD	240x64 Graphics LCD & 2x20 text LCD
Pole Display Support	MICROS 240x64 Graphical LCD MICROS 2x20 VFD	MICROS 240x64 Graphical LCD MICROS 2x20 VFD	MICROS 240x64 Graphical LCD MICROS 2x20 VFD	6" Pole Mount LCD Customer Display	Pole mount for LCD optional	240x64 & 2x20 text-based (18" available)	6" Pole Mount

See Also

Workstation Hardware	List of Workstation Models · KWS4 · WS4 · WS4LX · WS5 · WS4/WS4LX/WS5 Comparisons · 2010 · MTablet and mStation
Learning series: Workstation Hardware	

Need a question answered about the **Workstation Comparison Chart** article? Want to offer a suggestion or a correction?
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Workstations (EMC Module)

For other uses, see Workstation

In EMC, the **Workstations Module** is the location where a programmer configures the workstations that are used for a Property. In this context, the term "workstation" refers to any *workstation application* that is running, and not necessarily to the hardware on which it runs. The workstation application can be run on MICROS hardware (WS5 or MMH, among others), third-party hardware (such as the IBM SurePOS (http://www-03.ibm.com/products/retail/products/pos/500/)) or even directly on a user's laptop or PC.

This article contains a **best practices** section.

This article relates to programming of an EMC module.

This article discusses a topic related to **hardware**.

Contents

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  - 1.1 General
    - 1.1.1 Service Host Fields
  - 1.2 Service Host
  - 1.3 Transactions
    - 1.3.1 Transaction Settings
    - 1.3.2 Cash Drawer Settings
  - 1.4 Options
    - 1.4.1 List of Options
  - 1.5 Order Devices
  - 1.6 Printers
  - 1.7 Revenue Centers
  - 1.8 Devices
    - 1.8.1 Limitations
- 2 Best Practices
- 3 See also

EMC Configuration

The **Workstations** module is accessed from the Property Scope, under the "Property Hardware" header. The Workstations Module has more configurable fields than most EMC modules; Form View for the module is comprised of seven tabs.

General

Workstation ID

This field displays the workstation ID of this workstation. The ID is the database ID, and it is not editable. This field is provided for troubleshooting purposes when log messages (etc.) reference the workstation ID instead of the object number.

Type

From the drop-down list, select the appropriate type for this workstation. The choices are:

1. Mobile MICROS
2. Workstation Client
3. KWS4 Client (currently not supported)
4. POSAPI Client (currently not supported)

Language

Select the default language of this workstation. This is the language that will always appear on the workstation's Default Sign-In Screen. An Employee with a different language configured will see his/her default language after signing in to the workstation.

Resolution Cols

Set the number of Resolution Columns for this workstation's display. This number should correspond to one of the resolutions defined in the workstation's INI file, or it should be left at 0 as a default.

Resolution Rows

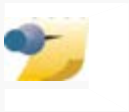
Set the number of Resolution Rows for this workstation's display. This number should correspond to one of the resolutions defined in the workstation's INI file, or it should be left at 0 as a default.

Log Verbosity

Set the verbosity of the logging for this workstation. In general, this field should be set to "0" for minimal logging. Higher settings will cause the workstation's disk or flash drive to fill more quickly.

Database Update Frequency

This field determines the number of seconds this workstation will wait to retrieve the latest updates from the database. The default value for this field is 60 seconds. This field overrides the Database Update Frequency setting from Property Parameters.



MICROS recommends that the Resolution Cols and Rows fields are set to "0" in most circumstances. When set to 0, the workstation will automatically determine which resolution to use (a WS4 will use 800x600 while a WS5 will use 1024x768). In general, this field is only changed for workstations that are not running on MICROS hardware. For example, a manager may want to run a workstation on his PC in the office but not have it display as a full-screen application. In this example (assuming the manager's screen resolution is 1024x768), the manager would set the values to 800x600 so that the client displays but does not occupy the full area of the screen.

Check Inactivity Timeout

Enter the number of seconds that the workstation will wait before popping up a dialog message (**`Do you need more time?`**), prompting operators to cancel the transaction. This field has been created for security purposes: if an operator signs in, begins a check, and then walks away from the workstation before paying or service totaling, the workstation's dialog message to cancel the transaction should alert employees that the workstation is in mid-transaction without an active user. Note: If this field's value is 0, the dialog will not display.

Check Inactivity Dialog Timeout

This field works in conjunction with the "Check Inactivity Timeout" entry. Enter the number of seconds that the workstation will display the Inactivity Dialog (**`Do you need more time?`**) before the transaction will be automatically cancelled by the workstation. This field has been created for security purposes: if an operator signs in, begins a check, and then walks away from the workstation before paying or service totaling, the workstation's dialog message to cancel the transaction should alert employees that the workstation is in mid-transaction without an active user. If the dialog displays for the amount of time configured in this field, the transaction will automatically be cancelled by the workstation. Note: If this field's value is 0, the transaction will not automatically cancel.

Report Timeout

This field determines the number of seconds the workstation will wait to retrieve reporting information from the gateway. When the timeout limit is reached, the report will fail with the error message, "Failed to get report". Note that the gateway report service uses a separate timeout while waiting for a response from the mymicros.net server.

Service Host Fields

Each workstation is a Service Host, although workstations do not display in the Service Host module in EMC.

Service Host ID
: This field displays the Service Host where this Workstation Application is running.

Address / Host Name
: Enter the IP Address or Host Name of the Service Host where this Workstation Application will run.

Subnet Mask
: Enter the Subnet Mask of the Service Host where this Workstation Application will run.

Default Gateway
: Enter the Default Gateway of the Service Host where this Workstation Application will run.

Is Connectionless
: When this option is enabled, this service host will open and close a new connection for each web service call. While slightly slower than leaving this option unchecked, enabling this option helps to prevent machines from reaching the maximum number of web connections allowed. This option should be enabled for Service Hosts running on the Windows XP operating system.

Remove OPS From Service Host
: This link will delete the workstation record, but not the Service Host on which it resides. For more information, see Service Host: Workstations Module.

Service Host

The Service Host Tab displays a list of services that are running on this workstation's Service Host. The settings on the Service Host Tab are not configurable; this tab displays for informational purposes only. See also, Service Host.

Transactions

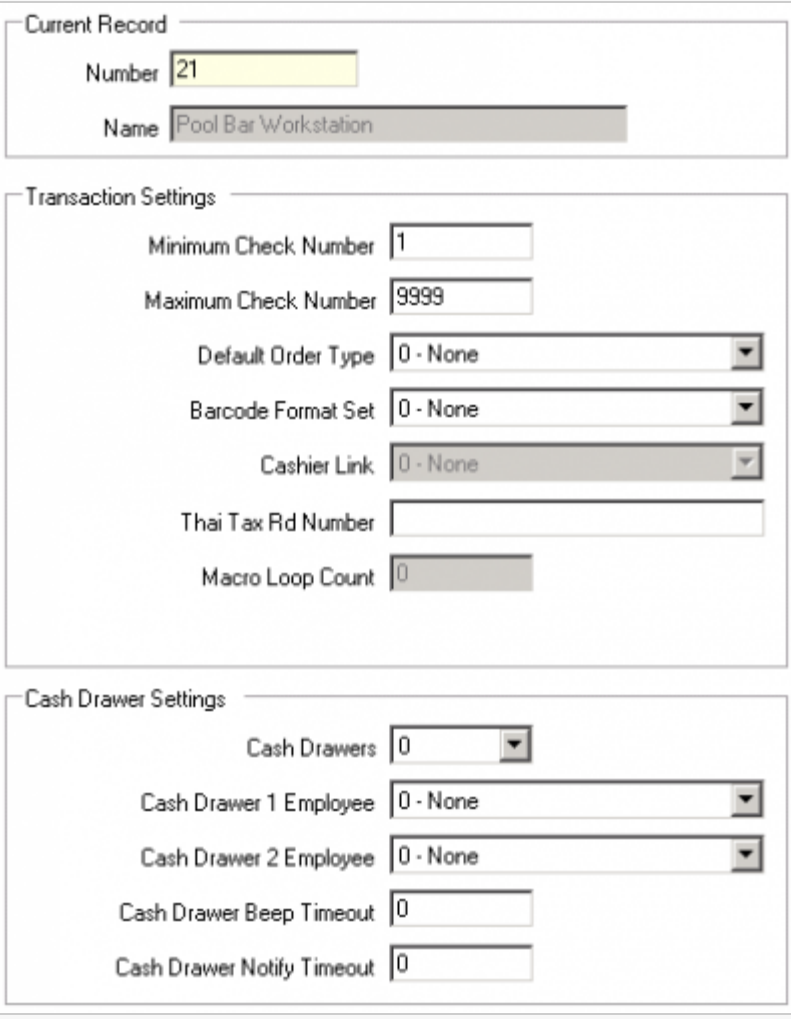
Transaction Settings

The Transactions Tab includes settings related to transaction behavior and Cash Drawer configuration.

Minimum Offline Check Number
: Enter the Minimum Guest Check Number to be used when the workstation enters Offline Mode.

Maximum Offline Check Number
: Enter the Maximum Guest Check Number to be used when the workstation enters Offline Mode.

Default Order Type
: From the drop-down list, select the Order Type to remain active on this workstation unless changed manually. This field is not a mandatory setting: If this field is set to "0-None", the Order Type will default to the setting from the



The Transactions Tab of the Workstations module.

Revenue Center Parameters Module. If there is no Default Order Type declared in Revenue Center Parameters, and this field is set to "0-None", operators will be required to declare the Order Type for each transaction before service totaling or paying.

Barcode Format Set

Select a Barcode Format Set to be used by this workstation. Barcode Format Sets determine how the workstation should read barcodes of various lengths. Typically, only one Barcode Format is used per property, however more than one can be programmed based on site/workstation requirements.

Cashier Link

This field is only available when the option, **[ON = Link Cashier Totals to WS; OFF = Link to Operator]** is enabled. The cashier records displayed in this combo box are generated from the RVC selected as RVC #1 on the Revenue Centers tab. Select the Cashier Record to be linked to this workstation. Cashier Records can be linked to a workstation to provide sales information for the workstation, such as Menu Item Sales and Tenders.

Thai Tax Rd Number

This field is used with Thai Tax Trailer printing. NOTE: The name RD NUM must be included as part of the descriptor line for it to be printed in the trailer. Also, the RVC Tax Option **[Thai Tax Trailer Uses WS Number Instead of RVC Number]** determines whether the RD Number will be obtained from this field or from the Revenue Center Descriptors Module. The Tax Invoice and Account lines are a set of numbers from the Revenue Center Parameters Module which will increment with each closed check.

Macro Loop Count

This field is generally used for testing purposes only, and it is enabled only when Workstation Option #35, **[Enable Macro Loop Count]**, is enabled. Set the maximum number of times that a macro can loop over itself before breaking out of the loop. Note that this field is overridden when the Property Parameters option, **[Do Not Check for Macro Loop Limit]** is disabled (limit will always be 20 iterations).

Cash Drawer Settings

Cash Drawers

Select the number of cash drawers (0, 1, or 2) that are physically installed at this workstation.

Cash Drawer 1 Employee

This field shows the operator currently assigned to Cash Drawer 1. Operators can assign themselves to Cash Drawer 1 by using the **[Assign Cash Drawer]** or **[Assign Cash Drawer 1]** function keys (848 or 839) at the workstation, and programmers with access to this field in the EMC can assign/unassign users to Cash Drawer 1 by changing the selection in this drop-down list box. (To unassign a drawer, set the field to "0-None".)

Cash Drawer 2 Employee

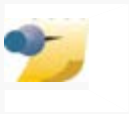
This field shows the operator currently assigned to Cash Drawer 2. Operators can assign themselves to Cash Drawer 2 by using the **[Assign Cash Drawer]** or **[Assign Cash Drawer 2]** function keys (848 or 840) at the workstation, and programmers with access to this field in the EMC can assign/unassign users to Cash Drawer 2 by changing the selection in this drop-down list box. (To unassign a drawer, set the field to "0-None".)

Cash Drawer Beep Timeout

Enter the number of seconds the cash drawer can be open before the workstation begins beeping. If the value is set to 0, no beeping will occur.

Cash Drawer Notify Timeout

Enter the number of seconds the cash drawer can be open before the workstation posts a message to the Journal Log. This type of message may or may not be configured to send a notification (page) to a manager. If the value is set to 0, no message will be posted to the Journal Log.

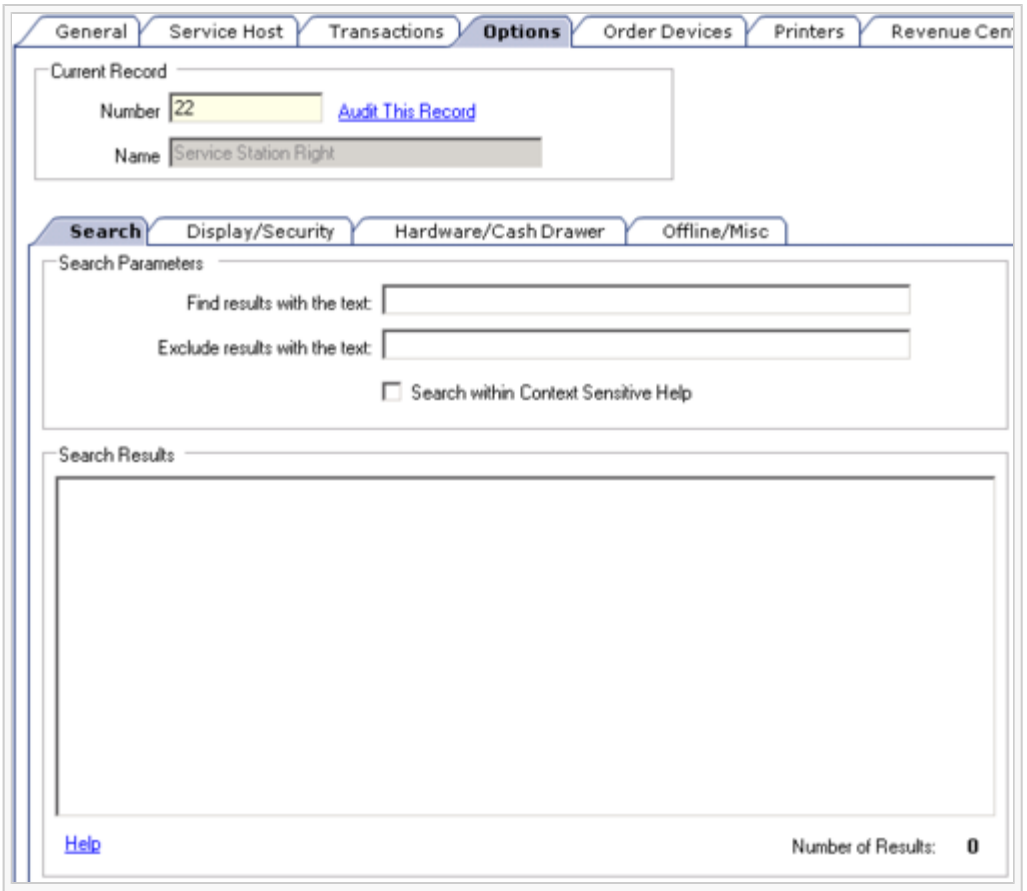


The Cash Drawer Timeout options apply only when the workstation's option, **[3 - Require Cash Drawer to be Closed Before New Tansaction]**, is enabled.

Options

The Options Tab lists options for the workstation. There are four sub-tabs for this tab:

- **Search** - This tab (displayed in the image) lets a user search for an option by name. When search information is entered, options from the other three tabs are added to this page's checked list box. Options can be checked from this tab or from the original tab where the bit is located; the change is immediately reflected when switching from tab to tab.
- **Display/Security** - This tab shows options related to the workstation's display and security, such as the requirement to use Mag Cards to sign in.
- **Hardware/Cash Drawer** - This tab shows options relating to peripheral hardware (such as Signature Capture devices or LDS interfaces) and Cash Drawers.
- **Offline/Misc** - This tab shows options relating to Offline Mode and other "miscellaneous"



The Options Tab of the Workstations module. This tab is divided into four sub-tabs, including a Search Tab that lists options from the other three tabs.

options that do not fall within a particular category.

List of Options

These are the configurable option bits for workstations:

1 - Enable Keyboard/Screen Beeper
When this option is enabled, a beep will sound each time a user presses a key on this workstation. If this option is disabled, no beep occurs.

3 - Require Cash Drawer to be Closed Before New Transaction
Select this option to require that cash drawers attached to this workstation are closed before a new transaction may begin. Do not select this option to allow transactions to begin while a cash drawer is open.

4 - Assign Cash Drawer By User Workstation
If this option is enabled, operators must assign themselves to a cash drawer by using one of the Function Keys 848, 839, or 840 (Assign Cash Drawer, Assign Cash Drawer 1, Assign Cash Drawer 2). Then, only the operator assigned to the drawer will be able to open it (or a privileged manager, who can unassign a drawer from a user). If this option is disabled, the Operator "Cash Drawer" field determines if an operator can access a cash drawer or not. In this scenario, all operators with the "Cash Drawer" field set to "1" will be able to open Cash Drawer 1. ***Note:*** *Giving multiple employees access to a single cash drawer is not as secure as requiring employees to be assigned to a Cash Drawer.*

5 - Do Not Clear Screen After Transaction
Select this option to cause the last screen of a transaction to remain on the display after the transaction is complete.

6 - Enable Rear Display
Select this option to enable output to a rear customer display attached to this workstation.

7 - Use Other Cash Drawer for Other Currency
This option is used only if two cash drawers are in use for this workstation and one is dedicated to a foreign currency. Select this option to cause the second cash drawer (not the drawer currently assigned) to open, when using a Tender/Media that opens the cash drawer and that is used with currency conversion. In addition, the foreign currency must allow change to be made in that currency. Note that this option will always open the "other" cash drawer; if the user is assigned to Cash Drawer 1, this will open Cash Drawer 2, but if the user is assigned to Cash Drawer 2, this will open Cash Drawer 1.

8 - ON = Link Cashier Totals to WS; OFF = Link to Operator
Select this option to allow this workstation to be linked to a single Cashier Record. Cashiers are linked to a workstation by using the **[Assign Cashier]** function key (845) on the workstation, or by setting the Cashier Link field on the General Tab. Disable this option, and totals are posted to the operator's Cashier Record, if one exists.

9 - North American LDS Attached to this WS
This option only applies to workstations using a Liquor Dispensing System. Select this option to indicate that the LDS attached to this workstation is a North American LDS. Do not select this option to indicate that an International Liquor Dispensing System is in use.

10 - Allow Replacement Sign-in Outside of Transaction
Select this option to allow an operator to sign in when another operator is already signed in, causing the workstation to automatically sign out the first operator. Do not select this option to require that an operator sign out manually before the next operator can sign in.

11 - Auto Begin Chk when Chk Optr ID/# Entered Outside of Trans
This option is active only if the "Allow Replacement Sign In Outside Transaction" option is disabled. Select this option to allow an operator to begin a guest check transaction by entering an Employee ID or Employee Number. The signed-in operator becomes the transaction operator; the employee whose ID or employee number was entered becomes the check operator (see Check Operator vs. Transaction Operator). If this option is enabled, sales totals and tenders posting are determined by the setting of the Revenue Center Parameters Posting options, **[Post Totals and Tender to Transaction Operator]** and **[Post Tender (only) to Transaction Operator]**. The workstation will require the use of either the employee ID or the employee number, as determined by the setting of the operator

option, **[Use Employee Number to Open Check for Another Employee]**.

12 - Mag Card Entry Required for Employee ID
Select this option to require that all Employee ID entries at this workstation are made using a magnetic Employee ID card. This applies to signing in and authorizing privileged operations, etc. If this option is selected, the workstation will not accept an Employee ID number entered through the keyboard or touchscreen. Do not select this option to allow the Employee ID to be entered by either a magnetic card or by the keyboard or touchscreen.

13 - Enable Scale Interface
Select this option to enable communication between this workstation and a scale.

14 - Enable Coin Dispenser
Select this option to enable communication between this workstation and a Coin Dispenser.

17 - Allow Offline Operations
Enable this option to allow this workstation to operate in Offline Mode.

19 - Enable Signature Capture
Select this option to enable communication between this workstation and a Signature Capture pad.

21 - Disable Employee Auto Sign Out
Select this option to disable the Automatic Operator Popup Interval programmed in Revenue Center Parameters. Do not select this option to cause operators to be signed out of this workstation after the Automatic Operator Popup Interval expires.

22 - Enable Mag Card Reader
Select this option to enable the Mag Card reader on this workstation. Disable this option if the workstation doesn't have a magnetic card reader.

23 - Enable RFID Reader
Select this option to enable an RFID reader on this workstation. Disable this option if the workstation doesn't have an RFID reader.

25 - Enable Sendsim
If this option is enabled, this workstation will be able to receive Sendsim messages. Disable this option to prevent this workstation from receiving Sendsim messages.

26 - Do Not Display License Warning in Early Grace Period
This option relates to system licensing when the licensing status has entered the Grace Period. If this option is enabled, this workstation will not display warning messages related to Grace Period status during the first 25 days of the 30-day Grace Period. If this option is disabled, the messages will be displayed. During the last 5 days of the 30-day Grace Period, messages will always be displayed; this option affects the behavior for the first 25 days only.

27 - Disable Auto-Online
A workstation will automatically return to Online Mode if communications have been reestablished and the number of messages created offline is less than the number specified in the Property Parameters "Automatic Online Message Limit" field. By enabling this option, the workstation will prompt the user to return online, instead of continuing online automatically.

28 - Is Kiosk
Enable this option if this workstation is a Kiosk. This option prevents certain option bits from applying, such as "prompt to confirm begin check" and beverage control options. Additionally, "Kiosk" workstations are always allowed to work while offline.

29 - Go Offline Without Prompting
When this option is enabled, a workstation will go offline automatically when communication with the server is lost. When this option is disabled, the user will be prompted to work offline.

30 - Barcode Pass-Through Mode
This option is used to disable the barcode format transformation performed by Ops. When this option is enabled, the raw barcode text is processed by Ops. This option is often enabled in instances where SIM accepts barcodes directly, instead of being translated by Ops first.

31 - NA LDS Manual Mode
When this option is enabled, the LDS driver will always acknowledge pour requests from the LDS system.

32 - Enable PC Keyboard Mag Stripe Reader
When this option is enabled, Ops will examine keypresses to determine if they originate from a keyboard or from a mag stripe reader. When a PC Keyboard Mag Read is attached, this option should be enabled.

33 - Show Cursor

Enable this option to display the mouse cursor for this workstation. This option is typically enabled for workstations that are installed on PCs (such as a hostess desk), but usually disabled for WS5 and other MICROS hardware platforms.

34 - Enable Manual Template Refresh

Enable this option for the workstation to reread the template configuration file and refresh the display without having to manually exit and enter Ops. If this option is disabled, Templates will only refresh after the Ops application has been exited and restarted. (This option is primarily intended for use by a programmer who is testing touchscreen templates; generally it is disabled.)

35 - Enable Macro Loop Count

This option is used primarily for testing purposes, and it applies only if the Property Parameters option, **[Do Not Check for Macro Loop Limit]**, is enabled. If this option is enabled, macros can loop over themselves only for the number of times specified on the Workstation General Tab, in the "Macro Loop Count" field.

36 - Use Alternate ID for Sign-in

Select this option to allow the operator to sign-in using a four-digit Alternate ID number rather than a ten-digit Employee ID number. (See also, Employee: General Tab.)

37 - Display Open Check SLU

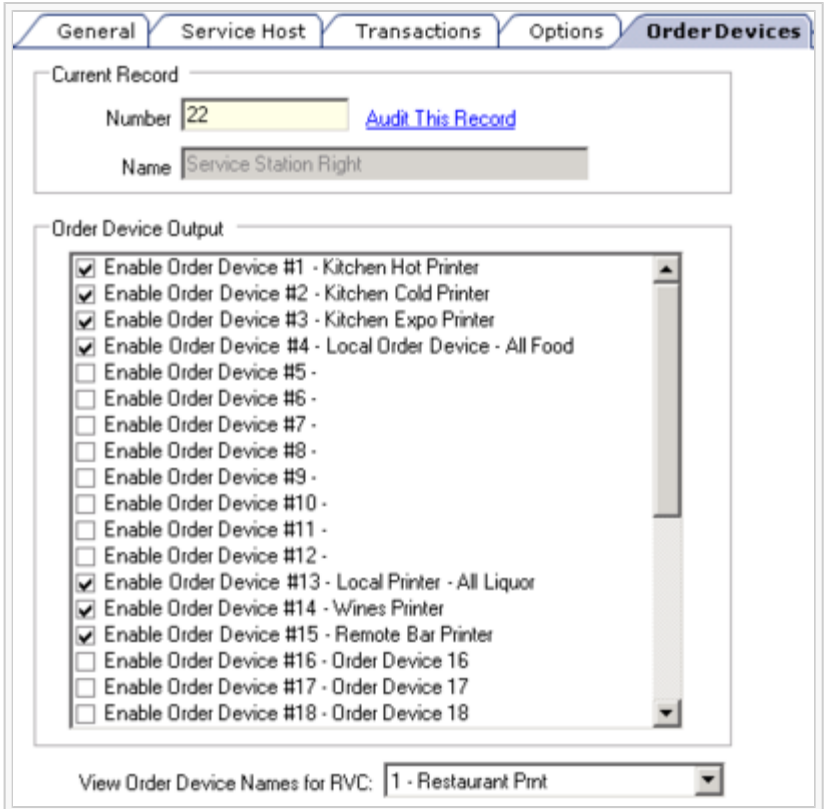
Select this option to cause this workstation to default to the Open Check SLU, instead of defaulting to a Default Transaction Touchscreen. This option is generally enabled in quick service environments where the operator is frequently picking up checks. This option is used in instances such as: drive-thru service, cashier banking, cafeteria service.

40 - Allow LDS Pours without WS Confirmation

This option controls NALDS behavior; when enabled, the NALDS will pour a drink prior to receving the release acknowledgement from OPS. When this option is not enabled, the NALDS will wait for a response from OPS prior to pouring the drink.

Order Devices

On the Order Devices Tab, a programmer determines the order devices where print jobs will be sent. This tab is used when determining how menu items print. In the example image, the "Service Station Right" workstation is enabled to print to all the food and beverage printers, which is common for workstations that are accessed by waitstaff. If a workstation is located behind the bar (and not accessed by waitstaff), it is likely that it will be programmed with the "Remote Bar Printer" unchecked; a bartender makes his or her own drinks, so it is not necessary for an order chit to print. There are a number of situations where a programmer may need to enable/disable these checkboxes, but the server/bartender example is one of the most common.



The Order Devices Tab of the Workstations module.

This tab includes the following:

Order Device Output

In this checked list box, enable/disable the appropriate order devices for the workstation. This list box displays 32 checkboxes, corresponding to the number available in a Revenue Center. The Order Device Names are

determined by the "View Order Device Names for RVC" drop-down.

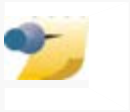
View Order Device Names for RVC

This field is informational only, and it defaults to the Revenue Center defined as Revenue Center #1 (out of 8) on the Revenue Centers tab. The purpose of this drop-down box is to show the names of the Order Devices from different Revenue Centers. The settings on this page show which Order Devices (1-32) are active for Order Output from this workstation. However, it can be difficult to determine which Order Devices are which just by number 1-32, especially if this workstation has multiple Revenue Centers defined. By changing this drop-down box, the names of the Order Devices from other RVCs display, giving the programmer a better idea about which Order Devices will receive print jobs. This field is especially useful when the selected workstation uses multiple RVCs.

Printers

The Printers Tab allows configuration of the different print-job types that can be performed on a workstation:

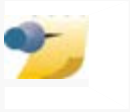
- Customer Receipt
- Guest Check
- Memo Check
- Credit Card Voucher
- Backup Printer
- PMC Report
- Validation Chit
- Time Chit
- Time Card
- Local Order Receipt
- Check Endorsement



While the ability to print each print job to a different printer allows great flexibility, it is typical that a workstation uses the same physical printer for each print job. To quickly configure this, select a printer as the "Customer Receipt" printer, and then select the "Set for all Printers" link. This will set all the printers (except the backup) to the same printer as the "Customer Receipt" printer.

Revenue Centers

On the Revenue Centers tab, up to eight RVCs can be assigned to a single workstation. The purpose of this tab is to allow configuration where a workstation can be accessed by operators working in multiple RVCs without needing to use the **[Download New RVC]** function key (846). For more information about using multiple RVCs on a single workstation, see Revenue Center Sign-In Keys.

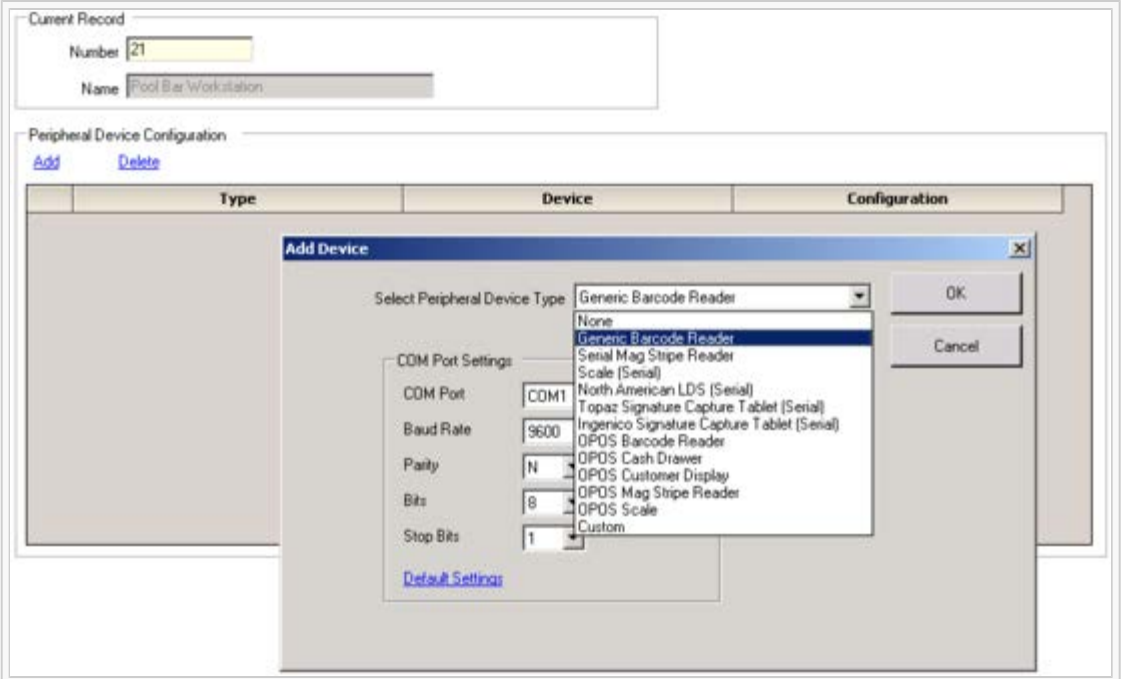


The Revenue Centers tab allows the configuration of two fields for each RVC: the RVC and the Default Transaction Touchscreen for the RVC. Programmers often configure this field improperly: this field represents the Default Transaction Touchscreen (the screen a user will see after signing in), not the Default Sign-In Screen (the screen that displays when no one is signed in) for the workstation.

When the selected workstation is a Mobile MICROS device or a Keyboard workstation, RVCs 2-8 are not enabled; Keyboards and MMH devices are designed to be single-RVC workstations only. In addition, when the selected workstation is a Keyboard, the "Default Transaction Touchscreen" text is changed to display "Power-On Keyboard". The field then displays a list of Keyboards programmed for the selected RVC. The Power-On Keyboard is the Keyboard record that will be used when the workstation is turned on.

Devices

From the Devices Tab, a programmer can add, configure, and delete peripheral devices that are attached to the workstation. This tab displays a grid with Add/Delete links. When Add is clicked, the "Add Device" dialog displays (shown in image). After selecting a device from the drop-down, the COM Port Settings can be configured for the device. (OPOS devices do not display the COM Port settings; instead, a single "Configuration" textbox is provided to enter the OPOS configuration string. Follow your OPOS documentation for more information.)



The Devices Tab of the Workstations module. When the "Add" link is clicked, the Add Device Dialog displays, letting a user configure the peripheral device(s) attached to the workstation.

Limitations

Starting with Simphony 1.4, EMC enforces rules regarding which devices can be attached to which workstation types. For example, it is not possible to connect a Scale to a MMH workstation. EMC prevents the following configurations:

- For Mobile MICROS devices, these devices are not supported:
  - RS232 Serial Mag Card Reader
  - Scale
  - NALDS
  - RFID
  - Signature Capture (Ingenico and Topaz)
  - All OPOS devices
  - Custom
- For Keyboard Workstations, these devices are not supported:
  - Scale
  - Signature Capture
  - All OPOS devices
  - Custom

Best Practices

When programming the "Minimum Offline Check Number" and "Maximum Offline Check Number" fields, the programmer should make efforts to provide a unique set of numbers per Workstation, per RVC; this is important in full service environments (where a check may start on one workstation and be picked up on another) but not necessarily in Fast Transaction environments. For example, if five workstations are in one Revenue Center, the check ranges could be:

- 1-1999
- 2000-3999
- 4000-5999
- 6000-7999
- 8000-9999

By creating unique check numbers, this will eliminate confusion for both the service staff and the accounting staff. Conversely, consider the five-workstation environment if every workstation's check range is 1-9999: the first check begun on each workstation while in Offline Mode will be check #1.

See also

Workstations	Workstation · **Workstations (EMC Module)** · Workstation IP Address Configuration · Workstation Status/Control · Workstation Comparison Chart · List of Workstation Models · Barcode Format Set
Learning series: Workstations	