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Preface

This document describes how to use Simphony First Edition version 1.7 features and functionality.

Audience

This document is intended for administrators and end users of Simphony First Edition version 1.7.x or later.

Documentation

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

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:
<https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

Revision History

Date	Description of Change
November 2015	Initial publication
September 2016	Updated features for v1.7.1
October 2016	Updated MasterCard preamble ranges
May 2017	<ul style="list-style-type: none">• Added instructions for configuring business Stat of Day (SOD)• Updated the Reports chapter
June 2017	<ul style="list-style-type: none">• Added the Audit Trail chapter• Added instructions for configuring a VisaD credit card driver• Updated the Workstations chapter• Added the Workstation Touchscreen chapter
August 2017	<ul style="list-style-type: none">• Added instructions for configuring a Microsoft Windows 32 client as a KDS• Updated the Business Day chapter

September 2017	<ul style="list-style-type: none"> Added a chapter named Descriptors that reviews descriptor configuration Added a chapter named Guest Check Headers and Trailers and included content about configuring logo printing Added content about touchscreen bitmaps to the Workstation Touchscreens chapter
October 2017	<ul style="list-style-type: none"> Added the Tax Classes and Canadian Goods and Services Tax (GST) chapters
February 2018	<ul style="list-style-type: none"> Updated Chapter 14 and Added Workstation Status/Control content
January 2019	<ul style="list-style-type: none"> Updated the following: <ul style="list-style-type: none"> Chapter 4 - Payment and Currency VisaD driver configuration section Chapter 8 - Gift and Loyalty interface configuration section Chapter 14 - Workstations Status/Control content for the version 1.76 release Chapter 17 - Privacy and Personal Data Management content for the 1.7.6 release
January 2019	<ul style="list-style-type: none"> Removed former Chapter 12 - Transaction Services content and created a separate document named: <i>Oracle Hospitality Symphony First Edition Transaction Services Guide</i>

1 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 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.)

Reasons

Four tender reasons (Payment Reasons, Loan Reasons, Pickup Reasons, and Service Total Reasons) are used to prompt the operator to select a reason that a tender is being utilized; it is similar to a Reference Entry but it allows for finer control. Tenders prompt you when Tender/Media option, **[82 - Prompt for Reason]** is enabled.

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.

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 `^^[p13]` (where "3" represents the object number of the Print Logo) represents that a logo has been selected.

Miscellaneous

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.

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.

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

In the **Check Summary Descriptors** module, the descriptor type, "Non-Taxable Sales" is not available in Revenue Centers. This record is 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

- 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
- Thai Tax Descriptors
- Time Clock Reasons
- Training Headers

2 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, Guest Check Header lines include the name of the Property and/or Revenue Center. Guest Check Trailer lines generally display promotional information about upcoming events. At hotels, 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.

EMC Configuration

RVC Descriptors

The text (or logo) that prints is programmed in Revenue Center Descriptors, on the printing tab. 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 RVC Parameter 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 screenshot shows two tables for configuring guest check headers and trailers. The top table, 'Guest Check Header', has three rows (1, 2, 3) with columns for 'Text' (containing 'The Fancy Cafe', '1234 Main Street', and 'Columbia, MD 21044') and 'Use Logo' (checkboxes). The bottom table, 'Guest Check Trailer', has 11 rows (1-11) with columns for 'Text' (containing promotional messages) and 'Use Logo' (checkboxes). Both tables have a 'Logo' column on the right.

Guest Check Header			
	Text	Use Logo	Logo
1	The Fancy Cafe	<input type="checkbox"/>	<input type="checkbox"/>
2	1234 Main Street	<input type="checkbox"/>	<input type="checkbox"/>
3	Columbia, MD 21044	<input type="checkbox"/>	<input type="checkbox"/>

Guest Check Trailer			
	Text	Use Logo	Logo
1	Thank you for visiting!!	<input type="checkbox"/>	<input type="checkbox"/>
2		<input type="checkbox"/>	<input type="checkbox"/>
3	Visit The Fancy Cafe for	<input type="checkbox"/>	<input type="checkbox"/>
4	Mother's Day!!	<input type="checkbox"/>	<input type="checkbox"/>
5		<input type="checkbox"/>	<input type="checkbox"/>
6	Please call ahead for	<input type="checkbox"/>	<input type="checkbox"/>
7	reservations: 301-555-1122	<input type="checkbox"/>	<input type="checkbox"/>
8		<input type="checkbox"/>	<input type="checkbox"/>
9		<input type="checkbox"/>	<input type="checkbox"/>
10		<input type="checkbox"/>	<input type="checkbox"/>
11		<input type="checkbox"/>	<input type="checkbox"/>

Figure 2-1 Revenue Center Descriptors, Printing tab

(Optional) Although optional, these settings are typically 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.

Logo Printing

In Simphony, Customer Receipts and Guest Checks can print text as well as images. Logo Printing simply means that a check or receipt prints a logo. Typically, this is the logo of the property or of a single revenue center within the property. Currently, only monochrome bitmaps are supported

EMC Configuration

Printers Module

Each logo-printing device must be configured with the Enable Logo Printing option enabled. In the EMC, open the Printer module from the property scope and select a printer. While in Form View, enable the Enable Logo Printing checkbox. (This option only appears for the IDN Roll Printer type of printer).

Print Logos Module

The Print Logos module in the EMC enterprise scope allows logos to be stored in the database. Visit the Print Logos module for instructions. In our example for this article, the Print Logo stored in the database is named "Jolly Roger".

RVC Descriptors Module

Guest check and receipt headers and trailers are configured in this module. Select the revenue center where the print logo is desired, and open RVC Descriptors. Select the Printing tab. Each type of print job includes three columns:

1. Text
2. Use Logo
3. Logo

If the **Use Logo** box is enabled, the Logo column is enabled and the **Text** column is disabled. The Logo column provides a list of all the Print Logos configured in the system. Both text and the logos can print on the same header, just not on the same line. Often, the first line of a Guest Check Header is the name of the revenue center (Pirate Bar, in this example), while the second line is the logo. This is the sample configuration for this example. The **Jolly Roger** bitmap is selected as line #2.



Figure 2-2 Pirate Bar Logo

Supported Hardware

Currently, logo printing only works with TM-T88 (II) or TM-T88 (III) thermal printers communicating through an IDN line. The printer must have an IDN module with firmware that is capable of supporting Transparent mode. This equates to IDN module firmware Version 1.14 or later. The firmware version can be found by removing power from the printer, setting DIP switch 7 to the ON position and powering the printer back on. The version of the IDN card is displayed on the printout. This can also be checked on the back of the cover plate of the IDN module once it has been removed.

Assuming a user tries to configure a non-supported printer to print logos, such as a TM-200, unexpected behavior occurs. For example, the user may see non-alphanumeric characters printed on the receipt.

Note: Even though the printer type is listed as IDN in the EMC, it is important to note that logo printing currently does not function with an IDN Unicode module. The printer only works with standard ASCII IDN modules.

Supported Images

Logo printing only works with monochrome bitmap files. The easiest way to convert an image to a monochrome bitmap is to use Microsoft Windows Paint. This can be accomplished by selecting the “Black and white” radio button on the Image Attributes form.

Note that there are four basic rules that govern the size of a valid logo. These rules are as follows:

1. An image must have a width that does not exceed 512 pixels.
2. An image must have a height that does not exceed 384 pixels.
3. An image's area must not exceed 98,304 pixels.
4. The bitmap file must not exceed 8 kilobytes.

This does not mean that you may have a logo that is 512x384 because this would violate rule #3!

Troubleshooting

Guest Checks with logos print slowly

If a client receives a logo, but the logo is not yet in the printer's buffer, the printer requests the image. This transfer generally takes about five seconds. As a result, it appears that the printer hangs before printing the logo. All subsequent print jobs will print at normal speed since the logo is now in the buffer.

Logo does not print on subsequent print jobs

This may be caused by a number of things. Generally, powering off the printer for 10 seconds and powering it back on will clear the printer's image buffer. The printer will then request 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 may be invalid. Consult the rules previously listed in this article

3 Business Day

A business day refers to the beginning and end times of a day of business. A business day can have any begin time, but typically a business day starts in the early morning hours during a slow or closed period of operations (for example, 3:00 a.m. or 4:00 a.m.). A calendar day always begins at 12:00 a.m.

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).

To reset daily check and employee totals, a property or revenue center must start a new business day.

Start of Day

Start of Day (SOD) is the process that begins a new business day at a property. The SOD can be set to run automatically or manually.

When the time of day occurs that a new business day is automatically configured to start (for example, at 4:00 a.m. each day), the following actions occur in the order listed:

- Symphony FE increases the Business Day and updates the status of checks and employees.
- The PC Autosequence runs, and typically performs the following actions:
 - Batches and settles credit cards
 - Runs custom applications for a property

After the SOD Autosequence completes, Symphony FE checks to see whether it is time to run other autosequences (such as the Start of Week Autosequence, Start of Pay Period Autosequence, and so on).

Many properties like to start a new business day manually at their own time (after a night auditor balances reports). Often these properties stop their Symphony FE and property management systems at the same time, roll to a new business day, and then bring the systems back up. An administrator can manually run SOD in Symphony FE using an interaction called PC Autosequence (from the EMC) or by pressing a button on the workstation. When SOD begins manually, Symphony FE performs the same actions as if it were run automatically. The only difference is the method by which SOD begins.

Start of Business Day Rules

Symphony FE 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 and manual SOD.

When starting a new business day, the following rules apply:

- SOD cannot be run twice in 8 hours.
- SOD cannot be run twice between midnight and noon.
- SOD cannot be run twice between noon and midnight.
- When a business day is scheduled to run automatically, it is not possible to start the business day manually with a PC Autosequence.

A business day is calculated based on noon (12:00 p.m.) to noon times.

- If SOD is run before noon, Simphony FE assumes the business day completed is for the previous calendar day. (If SOD runs at 3:05 a.m. 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 FE assumes the business day completed is for the current calendar day. (If SOD is run at 11:52 p.m. on the 17th, the 17th is the business day that is closing, and the 18th is the business day being started.)

Start of Day with Offline Workstations or Server

Workstations are aware of the business date configuration so that offline reports show relevant information. Consider the following scenario:

- Every business day begins at 3:00 p.m.
- On Tuesday at approximately 11:00 a.m., a property loses communication with the database (the property is in Yellow Mode).
- The site is offline until Friday afternoon.

In this situation, workstations run reports as if SOD occurred. For example, a report taken for today on Wednesday at 4:00 p.m., shows data from Wednesday at 3:00 a.m. (the time SOD would have occurred) to the current second when the report was taken. In addition, if days are configured for manual SOD, workstation reports assume that the business day begins 24 hours after the previous SOD occurred. In this situation, a dialog box appears on workstations informing the manager that a new business day has begun.

Catch-Up mode increases the business day after the Simphony FE server goes offline during an automatically scheduled SOD time period. Consider the following scenario:

- SOD is set to run automatically at 4:00 a.m.
- At 2:00 a.m., the Simphony FE server experiences a power failure.
- At 6:00 a.m., the Simphony FE server is online again.

In Catch-Up mode, the SOD Autosequence does not start. With Catch-Up mode, the business day still starts at 4:00 a.m. When Simphony FE comes online at 6:00 a.m., the PERIOD_INSTANCE table is populated with rows to indicate that the business day started. The rows do not show a 6:00 a.m. run time, however. Catch-Up mode knows that the application was supposed to have started at 4:00 a.m., so the rows are created with 4:00 a.m. as the start time. Simphony FE can catch-up from up to two missed automatic start of days and make the appropriate PERIOD_INSTANCE entries.

Modifying the Automatic Start of Day

By default, Simphony FE runs automatic SOD at midnight. Use this procedure to set a different automatic SOD for your property.

1. Select the property, and then click **Property Parameters**.
2. Click the **Calendar** tab.
3. For each day of the week, select the **Time** at which to run SOD. All entries must be all AM or all PM.
4. Click **Save**.

Configuring a Manual Start of Day

1. Select the Enterprise level, and then click **PC Autosequences**.
2. Insert a PC Autosequence record and name it Increment Business Day.
3. Open the record, and then select the **Allowed Properties to view the autosequence**.
4. (Optional) Add Parameters as appropriate. For example, you can enter a property number and exclude a revenue center number.
5. On the **Steps** tab, add a step, and then from the **Step Type** drop-down list, select **3 - Increment Business Date**.
6. Click **Save**.
7. Select the property, and then click **Property Parameters**.
8. Click the **Calendar** tab.
9. Select **Run Manually** for each day of the week, and then select the **Increment Business Day** PC Autosequence.
10. Click **Save**.

4 Payment and Currency

Understanding Credit Card Drivers

A Credit Card Driver determines how the application communicates with a Credit Card Processor. Credit Card Drivers are configured at the Enterprise Scope, and then linked to Credit Card Merchant Groups.

Configuring the VisaD Credit Card Driver

1. Select the Enterprise, and then click **Credit Card Drivers**.
2. Insert a record, enter Visa as the driver name, and then click **OK**.
3. Double-click the new record to open it.
4. Select **3 - VISAD** as the **Type**, and then enter the **Maximum Batch Size**.
5. The Maximum Batch Size field is available for banks and driver types that can only support a specific number of records during credit card settlement. Set the field to 0 to process all records in the same batch.

Additional network configuration and certificate setup may be required for credit card processing to properly function. Contact your credit card processor to determine your network configuration and certificate requirements.

6. Select the appropriate options for the driver:

Table 4-1 VisaD Credit Card Driver Options

Option	Description
Include Expiration and Modified MSR Data during Settlement	Select to include the expiration date and modified Magnetic Strip Reader data during settlement.
Send RFID Data	Select to add RFID-related fields to the message. For some processors, this option is required for RFID transactions to be authorized and settled.
Enable Card-Level Results	Select to cause the driver to retrieve card-level results during authorization and return the data at settlement.
Enable POS Data Code	Select to cause the driver to report the POS Data Code at authorization and settlement.
Validate authentication once a day only	This option determines the frequency the application tests if the credit card processor's server certificate has been revoked. The test is performed using an industry standard Online Certificate Status Protocol (OCSP) server. If the default transaction performance interferes with business operations, select this option to perform the test on the first transaction after startup and then once per day. Deselect to perform test on every transaction.

7. Click the **Internet** tab, and then enter the following information:

Table 4-2 VisaD Credit Card Driver Internet Fields

Field	Description
Primary Internet Host	Enter the Primary Internet Host to receive the VisaD messages. This field is combined with the Primary Internet Port and Request URI to create the full address of the request location. For example, <code>https://something.receiving-url.com:8180/Micros/process_transaction.cgi</code> .
Primary Internet Port	Enter the Primary Internet Port to use in making VisaD messages. For example, 8180.
Secondary Internet Host	Enter the Secondary Internet Host to receive the VisaD messages if the primary host fails. This field is combined with the Primary Internet Port and Request URI to create the full address of the request location.
Secondary Internet Port	Enter the Secondary Internet Port to use in making VISAD messages if the primary host fails. This field is combined with the Primary Internet Host and Request URI to create the full address of the request location.
Request URI	Enter the Request URI to use when VISAD messages are sent to the processor. For example, <code>/Micros/process_transaction.cgi</code> .

8. Click the **Service Host** tab, and then select the service host or workstation where the credit card driver record is to run.

9. Click **Save**.

Understanding Credit Card Merchant Groups

A Credit Card Merchant Group identifies a revenue center or property during Credit Card Authorization and Credit Card Batching.

Configuring the Merchant Group for VisaD

1. Select the Enterprise, and then click **Credit Card Merchant Groups**.
2. Insert a record, enter a name for the merchant group, and then click **OK**.
3. Double-click the new record to open it.
4. Select **3 – VISAD** as the **Type**, and then configure the following information:

Table 4-3 VisaD Merchant Group Settings

Field	Description
Primary Authorization	Select the VisaD credit card driver record that you created in Configuring the VisaD Credit Card Driver from the and drop-down list.
Primary Settlement	Select the VisaD credit card driver record that you created in Configuring the VisaD Credit Card Driver from the and drop-down list.
Backup Authorization	Select the backup credit card authorization driver to use when the merchant group cannot establish communication with the Primary Authorization driver.

Field	Description
Backup Settlement	Select the backup credit card settlement driver to use when the merchant group cannot establish communication with the Primary Settlement driver.
Bank Identification Number	Enter the six-digit bank identification number assigned by the bank or processor in use.
Merchant Number	Enter the 12-digit number to use for identifying the merchant. This number is assigned by the bank or processor in use.
Store Number	Enter the four-digit number to use for identifying the merchant store. This number is assigned by the bank or processor in use.
Terminal Number	Enter the terminal number provided by the bank or processor.
Merchant Category Code	Enter the four-digit number assigned by the bank or processor to identify the merchant type. The drop-down list displays known category codes; if a different value is required, select 0 - Use Other , and then enter the to use in the alt field.
Industry Code	Select the value to identify the industry type to the merchant. This field is assigned by the bank or processor in use.
Country Code	Select the country where the merchant is located. The value for this field is assigned by the bank or processor.
Currency Code	Select a currency to use. The value for this field is assigned by the bank or processor.
Language Indicator	Select the language to use for Authorization Response messages returned to the workstation for display or printing. This field is used to designate the language in which
Time Zone Differential	Select the code used to calculate the local time within the VisaNet Authorization System. The value for this field is provided by the bank or processor.
Merchant Location	Enter the 13-character merchant location/city name provided by the bank or processor. For auditing purposes, the name should correspond to the location/city that prints on the Credit Card Voucher.
City Code (ZIP)	Enter the nine-character code used to further identify the merchant's location. Within the United States, the five or nine-digit zip code of the merchant's address is used. In other countries, this code is assigned by the bank or processor.
State	Enter the two-character code for the merchant state/province that is assigned by the bank or processor. For auditing purposes, the abbreviation that is used should correspond to the state/province code that prints on the Credit Card Voucher.

Field	Description
Batch Number	Enter a value (1-999) that is used to indicate the next sequence number. This number, which increments by one each time a new batch is created, is used by the processor to detect duplicate batches. The value for this field is provided by the bank or processor and it resets to 1 after 999 is reached.
Agent Bank Number	Enter the six-digit number that identifies the Agent Bank Number. The Agent Bank Number identifies the agent of the acquirer which signed the merchant. This value is provided to the merchant by the acquirer.
Agent Chain Number	Enter the six-digit number that identifies the Agent Chain Number. The Agent Chain Number identifies a specific chain of an agent organization; this number is provided by the merchant's bank or processor.

5. Click **Save**.

Assigning the VisaD Merchant Group to Properties and Revenue Centers

1. Select a property, and then click **Property Merchant Groups**.
2. From the Merchant Group column, select the VisaD merchant group record that you created for the appropriate properties or revenue centers.
3. Click **Save**.

Understanding Credit Card Preambles

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. All credit cards are configured in the EMC in the Tender/Media module.

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.

Table 4-4 US Credit Card Preambles

Start	End	Length	Card Type
40000000*	49999999*	16	Visa
51000000*	55999999*	16	MasterCard

Start	End	Length	Card Type
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

5 Tax Classes

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.

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 a field that contains the 64 Tax Rates that are available for the location. Any tax rate that is enabled, 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 taxed at 6%.

Services 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 a 6% add-on tax, the transaction has a balance of \$0. If the discount is not linked to a Tax Class, the transaction has a balance of \$0.30 ($\$5 \times \%6$).

Examples

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 are enabled.

A Tax Class can be programmed with multiple Inclusive Tax Rates, but then a workstation shows a Tax class programming error. Only one inclusive tax rate allowed message, 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 has 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.

Table 5-1 Using Order Types (Example)

RVC	Order Type Tax Configuration
Bar	<ul style="list-style-type: none">• Inclusive Tax Rate ENABLED• Add-on Tax Rate DISABLED
Restaurant	<ul style="list-style-type: none">• Inclusive Tax Rate DISABLED• Add-on Tax Rate ENABLED

Tax Options Description

RVC Parameters Module

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 exempt's tax. The voucher prints at the validation printer designated for the workstation. Deselect this option to suppress printing of a tax exempt voucher.

Foreign Tax Options

1. 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.
2. 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.
3. Thai Tax Trailer Uses WS Number Instead of RVC Number
This option is only used when the [6 - Enable Thailand Tax Printing] option is enabled. Select this option to print the last two digits of the workstation number on the Tax Invoice and Account Record lines. Disable this option to print the last two digits of the revenue center number.

6 Canadian Goods and Services Tax (GST)

This article is meant to serve as a setup guide in configuring Canadian Goods and Services Tax (GST) along with a Resort Tax.

Overview

For those sites in Canada that utilize the Sales Recording Module (SRM) feature (introduced in Symphony 1.5 Maintenance Release 4), and require a 'Resort Tax', be aware that the tax configuration is very specific when both the 'Goods and Services Tax (GST)' and the 'SRM' feature are enabled (see below).

- Tax Rate 1 must be configured as the 'Resort tax'
- Tax Rate 2 must be configured as the 'GST'
- Tax Rate 3 must be configured as the 'Provincial Sales Tax (PST)' respectively.

Additionally, under the Canadian Options tab-> the 'Use resort tax with Sales Recording Module' option should be enabled (further important details are shown below).

Sites with questions or concerns about this configuration should contact their Account Manager prior to making any changes.

EMC Configuration

Tax Table

Access the EMC from the Enterprise level and open the **Tax Table** module from the **General tab** and configure the appropriate Tax Types and percentages and **Save** all changes.

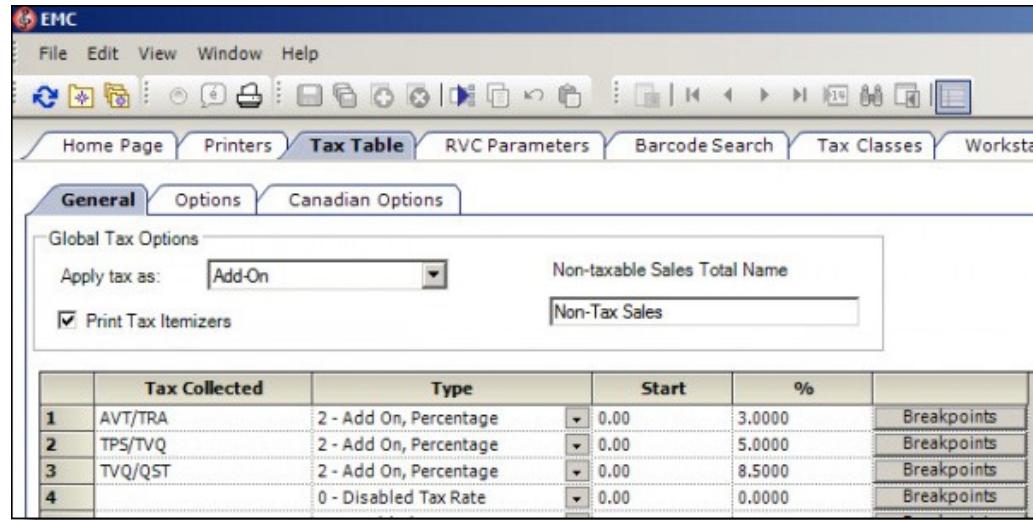


Figure 6-1 Tax Table

Canadian Options

Access the **Canadian Options** tab and set the **First** and **Second Thresholds**. If using the SRM feature and you require a Resort Tax, enable the **Use resort tax with Sales Recording Module** option as shown below and **Save** all changes. This option should not be enabled unless the site is using the SRM feature and is required to charge a Resort tax.

Sites that use the SRM, but do not require a Resort tax, should have the GST configured as Tax Rate 1 and the PST as Tax Rate 2.

For those sites that are using the SRM, note the Context Sensitive Help (CSH) as shown below for the **Enable Canadian GST** option:

Select this option to enable Canadian GST. This option must be enabled if Property Parameter-> Option 38- Enable Sales Recording Module' is enabled.

Enabling the Property Parameter-> Option 38 ensures that the GST tax is properly levied, tracked and posted to the SRM.

Provincial Sales Tax (PST)

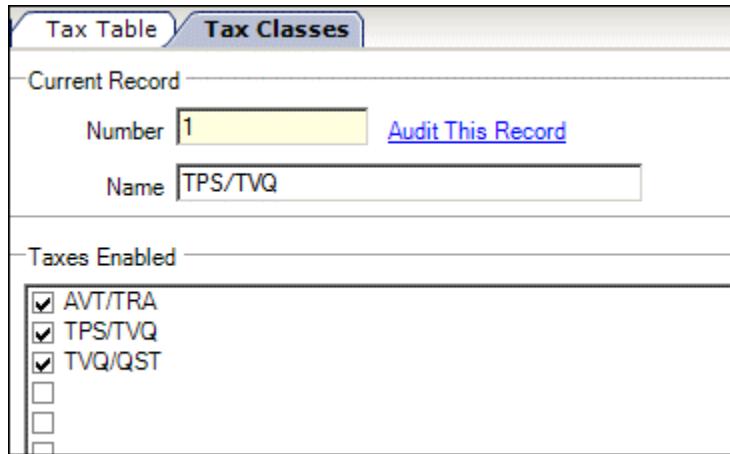
Configure the various fields shown below and **Save** all changes.

PST Totals Name			
TVQ/QST Total			
Tax Rate 2			
<input type="checkbox"/> Enable PST Tax Threshold 1	<input type="checkbox"/> Enable PST Tax Threshold 2		
Threshold 1 0.00	Threshold 2 0.00		
<input type="checkbox"/> Use if Other Itemizer is Zero	<input type="checkbox"/> Use if Other Itemizer is Zero		
<input type="checkbox"/> Include Tax Itemizer 2	<input type="checkbox"/> Include Tax Itemizer 2		
<input type="checkbox"/> Include Tax Itemizer 3	<input type="checkbox"/> Include Tax Itemizer 3		
<input type="checkbox"/> Include GST	<input type="checkbox"/> Include GST		
Tax Rate 3			
<input checked="" type="checkbox"/> Enable PST Tax Threshold 1	<input type="checkbox"/> Enable PST Tax Threshold 2		
Threshold 1 0.01	Threshold 2 0.01		
<input type="checkbox"/> Use if Other Itemizer is Zero	<input type="checkbox"/> Use if Other Itemizer is Zero		
<input checked="" type="checkbox"/> Include Tax Itemizer 2	<input type="checkbox"/> Include Tax Itemizer 2		
<input checked="" type="checkbox"/> Include Tax Itemizer 3	<input type="checkbox"/> Include Tax Itemizer 3		
<input type="checkbox"/> Include GST	<input type="checkbox"/> Include GST		

Figure 6-2 Tax Table - Canadian Options tab for the Provincial Sales Tax (PST)

Tax Classes

Access the **Tax Classes** tab and enable the applicable taxes and **Save** all changes.

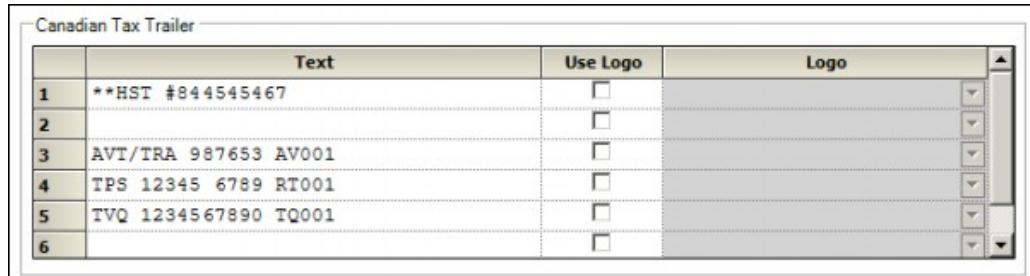


The screenshot shows a software interface titled 'Tax Table' with a 'Tax Classes' tab selected. The 'Current Record' section contains fields for 'Number' (1) and 'Name' (TPS/TVQ), with a link to 'Audit This Record'. The 'Taxes Enabled' section lists several tax categories, each with a checkbox. The checked boxes are AVT/TRA, TPS/TVQ, and TVQ/QST. There are also several empty checkboxes below them.

Figure 6-3 Tax Classes

Revenue Descriptors

Access the **RVC Descriptors** module (per Revenue Center), specifically the **Canadian Tax Trailer** settings and enter the applicable Tax Rates that are printed on the bottom of Customer Receipts and **Save** all changes.



The screenshot shows a table titled 'Canadian Tax Trailer' with six rows, numbered 1 to 6. Each row contains a text entry and a 'Use Logo' checkbox. The text entries are as follows:

	Text	Use Logo	Logo
1	**HST #844545467	<input type="checkbox"/>	
2		<input type="checkbox"/>	
3	AVT/TRA 987653 AV001	<input type="checkbox"/>	
4	TPS 12345 6789 RT001	<input type="checkbox"/>	
5	TVQ 1234567890 TQ001	<input type="checkbox"/>	
6		<input type="checkbox"/>	

Figure 6-4 Canadian Tax Trailer

RVC Parameters

Access the RVC Parameters file for each applicable Revenue Center and for each active **Order Type** (under the **General Options** header), under the **Active Tax Rates** header, enable the desired Tax Rates and **Save** all changes.

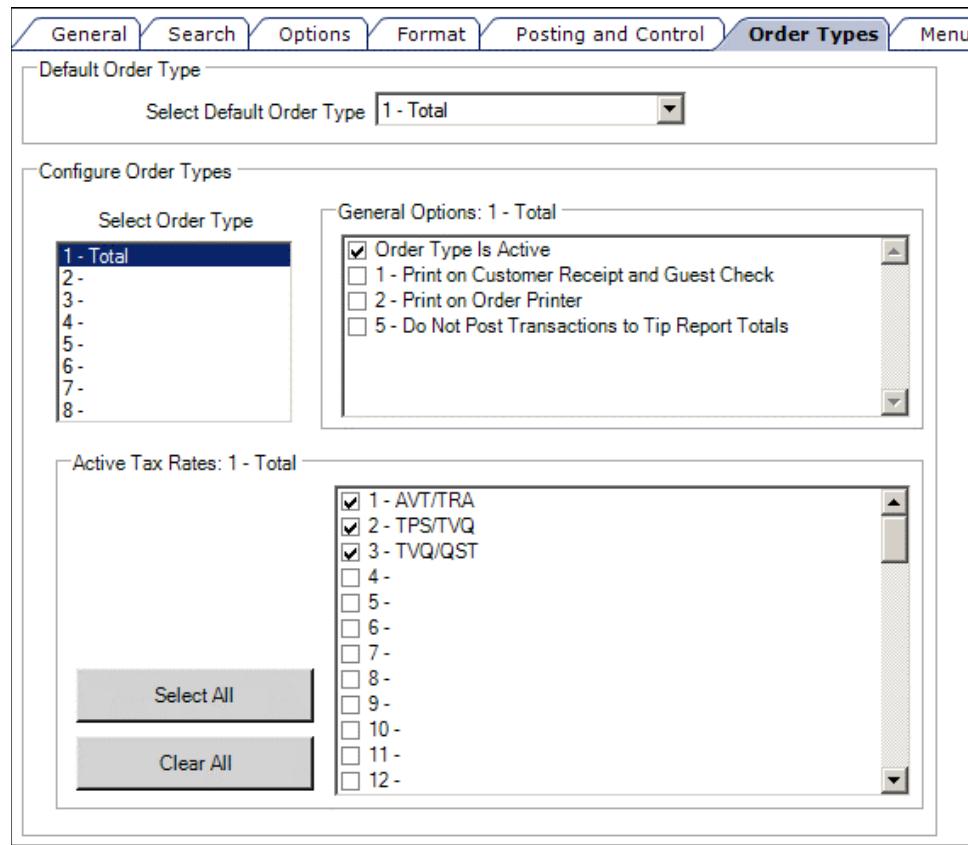


Figure 6-5 RVC Parameters Order Types - Active Tax Rates

7 Combo Meals

Understanding Combo Meals

A Combo Meal is a bundle of menu items sold to a customer for a special price.

Enterprise Cash Management (EMC) programmers can:

- Create menu item records for combo meals from the Menu Item Maintenance module
- Define combo meal groups and menu items that comprise combo meals
- Define the sizes for side items
- Configure different prices for menu levels and side item sizes

Workstation operators can:

- Use the auto-combo functionality to identify and then create combo meals
- Create a combo meal by selecting a primary menu item or by selecting each menu item separately
- Create multiple combo meals in a single action
- Change the size of a combo meal order or a side item
- Substitute side items in a combo meal

The Combo Meals feature is not supported on keyboard workstations (KWS).

Understanding Combo Meal Groups

When a workstation operator presses one of the combo function keys, the workstation attempts to create combo meals by looking for menu items from different combo meal groups.

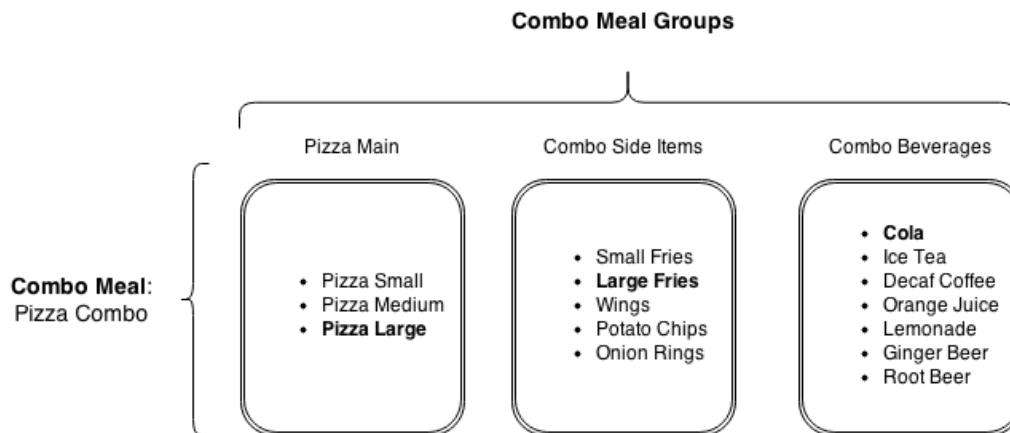


Figure 7-1 Example of Combo Meal Groups

For example, to create the combo meal Pizza Combo, a workstation operator can enter a menu item from each combo meal group in Figure 1 (for example, Pizza Large, Large Fries, and Cola) and then press the **Auto Combo** key.

Understanding Combo Meal Pricing

Combo Meal modules ignore the menu item prices configured in the Menu Item Maintenance module. If you set a price for a side item in the Menu Item Maintenance module but not in Combo Meal Groups or Combo Meals modules, the workstation does not charge for the side item.

You can assign a single price for all side items in a combo meal group from the Combo Meals module under **Combo Group Price**.

To set individual prices for side items, define prices from the Combo Meal Groups module under **Combo Group Item Prices**. Prices assigned from the Combo Meal Groups module override the prices assigned from the Combo Meals module.

In summary, prices are prioritized in the following order:

1. **Combo Group Item Prices** (Combo Meal Groups module)
2. **Combo Group Price** (Combo Meals module)

From both modules, you can configure prices for up to eight menu levels.

The following options affect the combo meal prices:

- **1 - Allow Discounts** (Combo Meal Groups)
- **2 - Substitution Group items use this sides price** (Combo Meal Groups)
- **6 - No Charge For Condiments** (Combo Meals)
- **47 - Suppress Price with Combo Meal** (Menu Item Classes)
- **25 - Discount Combo Meal Group Items** (Discounts)

For more information about these options, see [Configuring Combo Meal Groups](#), [Configuring Combo Meals](#) and [Configuring Additional Combo Meal Options](#).

Configuring Combo Meals

Configuring a combo meal consists of completing the tasks listed in the table below:

Table 7-1 Overview of Configuring Combo Meals

Task	More Information
Adding menu items to a combo meal group	Configuring Combo Meal Groups
Grouping combo meal groups under a menu item master	Configuring Combo Meals
Configuring additional combo meal options	Configuring Additional Combo Meal Options
Configuring combo screens and adding function keys	Configuring Combo Meal Touchscreens

Configuring Combo Meal Groups

1. Select a revenue center, and then select **Combo Meal Groups**.
2. Insert a new combo meal group record, enter the name, and then click **OK**.
3. Double-click the combo meal group record to open it in form view.
4. From the **General** tab, select the screen lookup (SLU) for the combo meal group items to appear.
5. Configure the options in the **Option Bits** section as described in the table below:

Table 7-2 Combo Meal Group Options

Option	Description
1 - Allow Discounts	Select this option to have discounts apply to items in the group. You must also select the option Discount Combo Meal Group Items to link the discount to the menu item.
2 - Substitution Group items use this sides price	Select this option so that when substituting a combo meal side item from an alternate group, the workstation derives the price for the substituted item from the Combo Group Price in the Combo Meals module. Deselecting this option causes the workstation to derive the price from the alternate group.

1. (Optional) Select an alternate combo meal group from the **Alternate Groups** section.

When alternate groups exist, the workstation operator can substitute a combo meal with an alternate group item using the **Combo Alternate Side** key.
2. Click the **Items** tab, and then click the **Add** link in the **Combo Group Items** section to add menu items to the combo meal group.
3. Configure each menu item in the combo meal group using the configuration listed in the table below:

Table 7-3 Combo Group Item Configuration

Field or Option	Description
Primary Menu Item	Select a menu item to use in the combo meal group. You can select any menu item master record that has a definition in the revenue center.
Quantity	Enter the quantity of menu items required to complete the side item requirement when ordered as a default for a given order type. The quantity defined here overrides the quantity defined in the Combo Meals module
1 - Default when no Order Type declared	Select this option to make the item the default item for the combo group when a workstation operator creates a combo meal without defining an order type.
Default for Order Type 1-8	Select these options to configure the item as the default item when order type 1 through 8 is active.
10 - Autofill	Select this option to have the application automatically change the quantity to fulfill the Quantity requirement when a customer does not order one or more items required for the side to complete the combo meal.

Field or Option	Description
Size (1-4) Item	Select a menu item to substitute the (default size) primary menu item when changing the size of a side item using the Combo Size 1 through Combo Size 4 function keys. Size (1-4) Item lists all items assigned to this combo group but only after they are saved. You cannot define prices for size items when a price for a menu level is active.
Size 1-4 Menu Levels	Select a menu level that affects the price of the substituted Size 1-4 Items. You cannot define prices for a menu level when a price for a size is already defined.

4. Click the **Prices** subtab, and then click **Add** to configure prices for each item in the combo meal group. You can configure prices for eight menu levels per combo meal group item.

Table 7-4 Combo Group Item Prices Configuration

Field	Description
Price	Enter the price to charge for the item.
Active On Level	Select the menu level on which the price is active.
Effectivity Group	Select the effectivity group for this price (optional).
Date Start	Enter the start date for the effectivity group.
Date End	Enter the end date for the effectivity group.

5. Click **Save**.

Configuring Combo Meals

After creating combo meal groups, from the Combo Meals module you can link a primary combo meal group (base item) and several side combo meal groups to a menu item master. Before assigning a menu item master, you need to create a menu item master record that identifies the combo meal from the Menu Item Maintenance module (for example, Combo Meal #1 or Pizza Combo).

1. Select a revenue center, and then select **Combo Meals**.
2. Insert a new combo meal record, enter the name, and then click **OK**.
3. Double-click the combo meal record to open it in form view.
4. Select a **Menu Item Master** (for example, Combo Meal #1 or Pizza Combo).

5. Define the **Priority**.

If you assign a menu item master record to more than one combo meal, **Priority** determines the order in which the workstation associates the combo meal with the menu item master when the workstation operator presses the **Auto Combo** function key.

6. Select from the optional configurations listed in the table below:

Table 7-5 Combo Meal Configuration Options

Option	Description
1 - Disable Auto-Combo Recognition	Select this option to prevent the workstation from considering this combo meal when the workstation operator uses the Auto Combo function key.
2 - Allow Auto-Combo in Previous Round	Select this option to allow the combo meal to consider previous-round items when the workstation operator uses the Auto Combo function key.
3 - Is Sized Combo Meal	Select this option to combine items only of the same size when the workstation operator uses the Auto Combo function key.
4 - Add Side Prices To Meal Price	Select this option to consolidate the side item prices with the parent combo meal. Deselect this option to have workstations and guest checks show the individual prices for combo meal group items.
5 - Only Print Priced Sides On Guest Check	Select this option so the receipt printer does not print the side items on guest checks when the side items have no prices or when the prices roll into the price of the meal.
6 - No Charge For Condiments	Select this option to set the condiments added to the combo meals at no charge.
8 - Allow Resizing of Individual Sides	Select this option to allow workstation operators to change the size of a specific combo meal side item. Deselect this option to have workstation operators resize the entire combo meal. This option only applies to sized combo meals created using the Combo Order Size 1-4 function keys.

Option	Description
9 - Do Not Show With Combo Meal Choices	<p>Select this option to prevent the workstation from displaying the combo meal in the system-generated list of combo meals when the workstation operator can create multiple combo meals from existing menu items.</p> <p>For example, consider the following combo meals:</p> <p><i>Combo Meal 1</i> with the option 9 - Do Not Show With Combo Meal Choices set:</p> <ul style="list-style-type: none"> • Burger • Fries <p><i>Combo Meal 2</i> with the option 9 - Do Not Show With Combo Meal Choices disabled:</p> <ul style="list-style-type: none"> • Burger • Sandwich <p>When the workstation operator adds a Burger, Fries, and a Sandwich to a check and then presses the Auto Combo function key, the workstation does not show <i>Combo Meal 1</i> as a combo meal choice.</p>

7. Click the **Add** link beneath **Combo Groups**, and then enter the **Side Count**. The **Side Count** defines the number of combo meal group items required for the combo meal.
8. Select a **Side Item Group** or a combo meal group.
9. Define prices for each menu level under **Combo Group Price**. Oracle recommends that you configure prices for combo meals with different sized items from the **Items** tab in the Combo Meal Groups module rather than the **Combo Group Price** table.
10. Click **Save**.

Configuring Additional Combo Meal Options

You can configure the manner in which workstations identify combo meals, condiment pricing, and discounts from the following EMC modules: RVC Parameters, Menu Item Classes, and Discounts.

RVC Parameters

Table 7-6 RVC Parameters Options That Control Combo Meals

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 recognition. The system attempts to generate a combo meal using the selected item and the menu items that follow it on the check. If the workstation cannot generate a complete combo meal, the workstation creates the combo meal using the selected menu item and new menu items.

Option	Description
52 - Allow Creation of Combo Meals from Previous Round Menu Items	Select this option to consider the menu items ordered in previous rounds when creating combo meals.
55 - Show Combo Meal Choices	Select this option to have the workstation show a list of all combo meals available to create from the items on the check. If combo meal priorities are set, the list only includes meals found at the same priority. Otherwise, the workstation creates the highest priority combo meal found.
7 - Perform Auto Combo Recognition	When a workstation operator changes the order type to an order type with Auto Combo Recognition set, the workstation attempts to identify combo meals from the menu items available on the check and creates combo meals whenever possible.
12 - No Confirmation Required when Creating Combo Meals from Existing Items	Select this option to have the workstation create a combo meal without prompting for confirmation when the workstation operator presses the Auto Combo function key. Deselect this option to have the workstation show a dialog with the possible combo meals, prompting the workstation operator to confirm after pressing the Auto Combo function key.

Menu Item Classes

Table 7-7 Menu Item Classes Options That Control Combo Meals

Option	Description
47 - Suppress Price with Combo Meal	This option is for condiment menu items only. Select this option if there is no charge for condiments ordered as part of a combo meal.

Discounts

Table 7-8 Discount Options That Control Combo Meals

Option	Description
25 - Discount Combo Meal Group Items	Select this option along with the Allow Discounts option from the Combo Meal Groups module to have the application discount side items in the combo meal group.

Remote Distributing Combo Meals

When using the Distribute functionality in the EMC, you must follow a logical order during the distribution task to prevent possible unlinked record settings. Distribute files from the “bottom up” in the following order:

1. Menu Item Classes
2. Menu Item SLUs (located in the RVC Descriptors module)
3. SLU Assignment
4. Menu Items
5. Combo Meal Groups
6. Combo Meals

Configuring Combo Meal Touchscreens

The application provides multiple options for configuring combo meal touchscreens, depending on the restaurant’s operational style. You can configure a combo meal touchscreen as a:

- Predetermined combo screen: You configure a combo screen to which workstation operators can navigate in order to create combo meals. When you configure a combo meal, you link menu item touchscreen keys to a menu item master item that is a combo meal
- À la carte combo screen: Workstation operators can select items that form a combo meal and then press a function key to create the combo meal. An à la carte combo screen may have different colored screen lookups to differentiate primary combo meal items from side combo items
- Combination of both types

Adding Combo Meal Function Keys

1. Select a revenue center, and then select **Touchscreen Design**.
2. Select the screen on which to place the function keys, and then add a new button.
3. Click the **Key** tab, and then select **11 – Function** from the **Key Type** drop-down list.
4. Click the right arrow adjacent to the **Key Number** field, and then select a combo meal function key.
5. Repeat Steps 2 through 4 to add the required combo meal function keys, and then click **Save**.

The table below describes the use of each combo meal function key:

Table 7-9 Combo Meal Function Keys

Function Key	Description
660 - Auto Combo	Creates combo meals from the menu items available on the check detail area. If the workstation can create multiple combo meals from the available menu items, the Combo Recognition dialog box shows the combo meals along with the combo meal savings.

Function Key	Description
661 - Combo	Creates a combo meal from the selected item or the last item on the check. The selected item must be a primary combo item. For example, if the combo meal is a burger (primary) with fries (side 1) and a drink (side 2), the workstation operator highlights the burger item before pressing the key.
662 - Combo Substitute	Substitutes a combo meal item with another combo meal item within the combo meal group.
663 - Combo Size 1 664 - Combo Size 2 665 - Combo Size 3 666 - Combo Size 4	Changes the size of a side item up to four sizes. If the workstation operator does not select an item, the workstation resizes the last item on the check.
667 - Uncombo	Ungroups combo meals into individual items.
668 - Combo Order Size 1 669 - Combo Order Size 2 670 - Combo Order Size 3 671 - Combo Order Size 4	Designates the combo meal as a sized meal (based on the selected order size) prior to creating the combo meal. For example, if the workstation operator presses Combo Order Size 2 and then creates a combo meal, the workstation limits the choices for the combo meal group items to the Size 2 Items defined in the Combo Meal Groups module.
672 - Bulk Combo Order	Creates multiple combo meals up to 99 at once. Use this key to add combo meals to the guest check in quantity. For example, workstation operators can add ten Hamburger Combo Meals to a check without individually ordering the side items for each combo meal.
673 - Combo Alternate Side	Substitutes a combo meal side item with an item from Alternate Groups in the Combo Meal Groups module.
674 - Combo Multi Selection	Creates a combo meal from the items selected on the check detail provided they belong to a combo meal defined in the EMC. This enables workstation operators to control what is in the combo meal.

Creating Combo Meals

The following subsections provide steps to create combo meals at the workstation.

Creating Combo Meals Automatically

1. Begin a check and add menu items.
2. Press the **Auto Combo** key.
3. Do one of the following:
 - If the workstation can create only one combo meal, press **Enter** to confirm the combo meal.
 - If the workstation can create multiple combo meals, select a combo meal from the Combo Recognition dialog box, and then press **OK**.

Creating Combo Meals Using the Combo Key

1. Add menu items, and then select a primary side item from which you want to create a combo meal.
If you proceed without selecting a menu item, the workstation attempts to create a combo meal using the last item ordered.

2. Press the **Combo** key. If the selected item or the last entered item is a primary side item in a combo meal, the workstation creates the combo meal.
If you define an order type before pressing the combo key and a default item is set for the order type from the Combo Meal Groups module, the workstation adds the default item to the check.
3. Select the side items from other combo meal groups to complete the combo meal.

Creating Combo Meals Using Menu Item Keys

You can create combo meals by pressing a **Menu Item** function key assigned to a Menu Item Master.

1. Press the menu item key, and then select the side items.
2. Repeat to select side items from other Combo Meal Groups.

Bulk Ordering Combo Meals

1. Press the **Bulk Combo Order** function key, and then select a combo meal master item.
2. Enter the quantity of combo meals, and then press **Enter**. You can order up to 99 combo meals.
3. Select the combo side item and amount, and then press **Enter**.
If the number entered is less than the quantity of side items required to complete the combo meal, you must select again until the workstation meets the quantity requirement for the bulk order. Side items may include different side items.
4. Repeat Step 3 to add all side items.

Creating Combo Meals Using the Combo Multi Selection

The **Combo Multi Selection** function key allows you create a combo meal by highlighting menu items from the check detail area.

1. Enter menu items.
2. Select the menu items from which you want to create a combo meal.
3. Press the **Combo Multi Selection** key. If the workstation can create a combo meal, the Combo Recognition dialog box appears.
4. Press **Enter** to confirm the combo.

Performing Other Combo Meal Functions

Changing the Size of a Combo Meal Side Item

Select one or more side items, and then press any of the following function keys to change the portion or size (upsized or downsize) of the side items that accompany a combo meal.

- **Combo Size 1**
- **Combo Size 2**
- **Combo Size 3**
- **Combo Size 4**

You cannot change the size of a side item on a reopened check.

Changing the Size of a Combo Meal

Press the sizing function keys before creating combo meals to define the combo meal size.

- **Combo Order Size 1**
- **Combo Order Size 2**
- **Combo Order Size 3**
- **Combo Order Size 4**

Before using the Combo Order Size keys, ensure that you have:

1. Defined the order sizes for side items from the Combo Meal Groups module.
2. Disabled the **8 - Allow Resizing of Individual Sides** option from the Combo Meals module.

Substituting or Changing an Alternate Side Item

To select another side item from the same combo meal group, select a side item, and then press **Combo Substitute**.

To select a side item from alternate groups, select a side item, and then press **Combo Alternate Side**.

Ungrouping Combo Meals

Select the parent menu item of the combo meal, and then press **Uncombo**.

Voiding a Combo Meal

Select the parent item of the combo meal, and then press **Void**.

8 Gift and Loyalty Programs

Understanding Loyalty Programs

Oracle Hospitality Gift and Loyalty Advanced, hereinafter, Gift and Loyalty, is a customer relationship management (CRM) application that allows properties to manage point-based loyalty card programs and stored value cards (SVC) (also known as gift cards). Gift and Loyalty tracks customer activities (such as frequency of visits, spending, and loyalty account balance) and reports the information through Simphony's enterprise reporting module. Simphony First Edition then sends this information to Gift and Loyalty.

The table below lists common types of loyalty programs:

Table 8-1 Types of Loyalty Programs

Loyalty Program	Description
Points earned per transaction or per visit	An award given for X number of visits. The award could be a discount, coupon for future visit, or stored value added to the loyalty account for later redemption.
Points earned per dollar spent	An award given for X dollars spent. The award could be a discount, coupon for future visit, or stored value added to the loyalty account for later redemption.
Discount card	Each time the workstation operator swipes a card, the check receives an automatic discount. Restaurants typically use discount cards to control employee meal discounts.
Category club card	The customer earns points when ordering a specific type of menu item (for example, burgers).

Understanding Stored Value Programs

A stored value program allows a guest to establish a prepaid account to use for purchases at a property. The prepaid payment vehicle is a stored value card with an associated monetary value. A gift card is an example of a stored value card containing a prepaid amount.

Configuring a Gift and Loyalty Interface

You can configure loyalty interfaces using the EMC. The stored value (gift card) and loyalty interfaces share a configuration. If multiple properties need access to the interface, create separate Gift and Loyalty interfaces for each property.

1. Select the enterprise, and then click **Interfaces**.
2. Click the insert record button to add a new Gift and Loyalty interface service and attach it to the appropriate Service Host.
3. Double-click the new interface record.
When using Interface **Type 6 – iCare**, additional network configuration and certificate setup may be required for the Gift and Loyalty Advanced Interface to properly function.
Contact your gift card processor to determine your network configuration and certificate requirements.
4. Configure the **General** tab as described in the table below:

Table 8-2 Interfaces General Fields

Field	Description
Communication Name	Enter the name for the interface based on the site.
Interface Type	Select 6 - iCare to use the Gift and Loyalty Advanced interface. Select 5 - Stored Value to use the standard loyalty and stored value interfaces.
Timeout	Enter the amount of time (in seconds) that Simphony First Edition waits for a response from the Gift and Loyalty Advanced interface.

5. On the **iCare Options** tab, configure the fields as described in the table below:

Table 8-3 Interfaces iCare Fields

Field or Option	Description
Certificate File (optional)	If a unique certificate file is being implemented, specify the location of the certificate file.
URL	Enter the web address path to the Gift and Loyalty Advanced server.
Ignore Server Certificate	Select this option to ignore the server certificate. If you entered a certificate file, deselect this option.
Log iCare Client Debug Data	Select this option to have Simphony log the Gift and Loyalty Advanced client debug information.
Log iCare Client Message Data	Select this option to have Simphony log the Gift and Loyalty Advanced client message request and response information.

6. On the **Properties** tab, select the property that uses the Gift and Loyalty interface, and then click **Save**.
7. Select the property, and then select **Property Parameters**.
8. On the **Workstations** tab, enter the **iCare Login** and **Password** to be used by the property's workstations, and then click **Save**.
9. Select the revenue center, and then click **RVC Parameters**.

10. On the **Interfaces** tab, select the Gift and Loyalty interface you created in Step 2, and then click **Save**.
11. Repeat Steps 9 and 10 for each revenue center that uses the Gift and Loyalty interface.
12. Repeat Steps 1 through 11 for each Gift and Loyalty interface.

Configuring the Stored Value Cards Module for a Revenue Center

You can configure a revenue center to use the Stored Value Cards module either with or without Gift and Loyalty Advanced settings.

1. Select the revenue center, and then select **Stored Value Cards**.
2. Insert a new stored value card record, enter the name, and then click **OK**.
3. Double-click the stored value card record to open it in form view.
4. Select the appropriate loyalty or stored value **Interface** from the drop-down list.
5. Select **iCare Interface** to have the Stored Value Cards module use Gift and Loyalty Advanced settings. Deselect **iCare Interface** if you do not use Gift and Loyalty Advanced settings.
6. Depending on the selection in Step 5, continue with the steps in the appropriate section below.

With Gift and Loyalty Advanced Interface

1. Configure the fields described in below.

Table 8-4 iCare Fields

Field	Description
Currency ISO Code	The three-character code which represents the currency used. Refer to http://www.currency-iso.org/dll_iso_table_01.xls for a list of currency ISO 4217 codes (for example, EUR = Euro, USD = US Dollar).
Language ISO Code	The two-character code which represents the language used. Refer to http://www.loc.gov/standards/iso639-2/php/code_list.php for a list of language ISO 639-1 codes (for example, EN = English, ES = Spanish).
Log Level	The level of debugging detail included in the log files.
Account Number Min Length	The minimum length of a stored value account number.
Account Number Max Length	The maximum length of a stored value account number.
Default Cash Tender	The name of the cash module to use for redemptions.
Max Card Activation Quantity	The maximum number of stored value cards that can be activated with the Activate Batch of Gift Cards function.
Max Card Issue Quantity	The maximum number of stored value cards that can be issued with the Issue Batch of Gift Cards function.

2. Select the appropriate options described below.

Table 8-5 iCare Options

Option	Description
Always Print Stored Value Results	Select this option to automatically print a chit after each successful stored value operation.
Never Display Stored Value Results	Select this option to hide the results of successful stored value operations (requiring a touch to continue) before returning.
Remove Stored Value Results Print Button	Select this option to hide the Print button from the stored value results. This is useful when you select Always Print Stored Value Results .
Remove Stored Value Guest Name Lookup Button	Select this option to remove the Guest Name Lookup button from the account number entry screen. Selecting this option disables the Guest Name Lookup feature.
Remove Stored Value Phone Number Lookup Button	Select this option to remove the Phone Number Lookup button from the account number entry screen. Selecting this option disables the Phone Number Lookup feature.
Always Print Loyalty Results	Select this option to automatically print a chit after each successful loyalty operation.
Never Display Loyalty Results	Select this option to have successful loyalty operations not show results (requiring a touch to continue) before returning.
Remove Loyalty Results Print Button	Select this option to hide the Print button from the loyalty results. This is useful when you select Always Print Loyalty Results .
Remove Loyalty Guest Name Lookup Button	Select this option to remove the Guest Name Lookup button from the account number entry screen. Selecting this option disables the Guest Name Lookup feature.
Remove Loyalty Phone Number Lookup Button	Select this option to remove the Phone Number Lookup button from the account number entry screen. Selecting this option disables the Phone Number Lookup feature.

3. Click **Save**.

Without Gift and Loyalty Advanced Interface

1. For each **Default Check Detail Item**, select the appropriate method for the stored value function (for example, tender, menu item, service charge, discount, and so on).
2. Enter the number of chits to print for each stored value function.
3. Select **Mask Account Number on Chits** to conceal the stored value card account number when it appears on guest checks and customer receipts.
4. Click **Save**.

Configuring Employees

1. Select the enterprise, and then select **Roles**.
2. Select a role, click the **Operations** tab, and then click the **Stored Value Cards** subtab.
3. Configure the employee privilege options as described below.

Table 8-6 Employee Privileges

Issue Options	Select this option to allow employees to:
Authorize/Perform Issue Stored Value Function	Issue a stored value card.
Authorize/Perform Void Issue Stored Value Entry	Void an issued card. Employees can perform Touch Voids and Direct Voids, but cannot perform Last Item Voids and Returns.
Authorize/Perform Issue Stored Value Batch Function	Issue a batch of stored value cards.
Authorize/Perform Void Issue Stored Value Batch Entry	Void a batch of stored value cards. Employees can perform Touch Voids and Direct Voids, but cannot perform Last Item Voids and Returns.
Authorize/Perform Activate Stored Value Function	Activate a stored value card.
Authorize/Perform Void Activate Stored Value Entry	Void the activation of a stored value card. Employees can perform Touch Voids and Direct Voids, but cannot perform Last Item Voids and Returns.
Authorize/Perform Activate Stored Value Batch Function	Activate a batch of stored value cards.
Authorize/Perform Void Activate Stored Value Batch Entry	Void the activation of a batch of stored value cards.
Reload and Redeem Options	Select this option to allow employees to:
Authorize/Perform Reload Stored Value Function	Reload (add credit) a dollar amount to an existing stored value card.
Authorize/Perform Void Reload Stored Value Entry	Void a reload transaction.
Authorize/Perform Redeem Authorization Stored Value Function	Perform a redemption authorization.
Authorize/Perform Void Redeem Authorization Stored Value Entry	Void a redemption authorization.
Authorize/Perform Redeem Stored Value Function	Perform a redemption transaction (a customer makes a purchase using a stored value card, and the application deducts a dollar amount from the customer's account).
Authorize/Perform Void Redeem Stored Value Entry	Void a redemption transaction.
Authorize/Perform Manual Redemption Stored Value Function	Perform a manual redemption.
Authorize/Perform Void Manual Redemption Stored Value Entry	Void a manual redemption transaction.

Point Options	Select this option to allow employees to:
Authorize/Perform Issue Stored Value Points Function	Issue points to a stored value card.
Authorize/Perform Void Issue Stored Value Points Entry	Void the issued points on a stored value card. Employees can perform Touch Voids and Direct Voids, but cannot perform Last Item Voids and Returns.
Authorize/Perform Redeem Stored Value Points Function	Perform a point's redemption transaction.
Authorize/Perform Void Redeem Stored Value Points Entry	Void a point's redemption transaction.
Other Stored Value Card Options	Select this option to allow employees to:
Authorize/Perform Manual Entry of Stored Value Card Number	Manually enter the stored value card account number.
Authorize/Perform Stored Value Cash Out Function	Debit some or all of the remaining balance on a stored value card.
Authorize/Perform Stored Value Balance Inquiry Function	Check a stored value card balance.
Authorize/Perform Stored Value Balance Transfer Function	Transfer the balance from one stored value card to another.
Authorize/Perform Stored Value Point Inquiry Function	Check a stored value card point balance.
Authorize/Perform Stored Value Report Generation Function	Generate stored value card reports.
Loyalty Options	Select this option to allow employees to:
Authorize/Perform Loyalty Coupon Inquiry	Request a list of available coupons for a loyalty account.
Authorize/Perform Accept Loyalty Coupon Function	Redeem a coupon associated with a loyalty account.
Authorize/Perform Void Accept Loyalty Coupon Entry	Void the coupon redemption.
Authorize/Perform Issue Loyalty Coupon Function	Issue a coupon to a loyalty account.
Authorize/Perform Issue Loyalty Points Function	Issue points to a loyalty account.
Authorize/Perform Void Issue Loyalty Points Entry	Void the point issuance.
Authorize/Perform Redeem Loyalty Points Function	Accept or redeem points to apply towards the balance of a check.
Authorize/Perform Void Redeem Loyalty Points Entry	Void the point redemption.
Authorize/Perform Redeem and Issue Loyalty Points Function	Redeem points and issue additional points to a loyalty account.
Authorize/Perform Void Redeem and Issue Loyalty Points Entry	Void the points redemption and issuance..
Authorize/Perform Loyalty Balance Inquiry Function	Request a point's balance for a loyalty account.

Authorize/Perform Loyalty Unique Item Inquiry Function	Request a list of unique menu items that were ordered on a program associated with a loyalty account.
Authorize/Perform Loyalty Balance Transfer Function	Transfer the points balance associated with one loyalty account number to another loyalty account.
Authorize/Perform Void Stored Value Cash Out Function	Void a stored value card cash out transaction.
Authorize/Perform Apply Loyalty Card to Check	Redeem points

4. Click the **Transactions** tab, and then configure the options as described in the table below.

Table 8-7 Service Charge and Discount Options

Service Charge and Discount Options	Select this option to allow employees to:
Authorize/Perform "Accept Coupon" Stored Value Function	Perform the Accept Coupon stored value function.
Authorize/Perform "Void Accept Coupon" Stored Value Function	Perform the Void Accept Coupon stored value function.

5. Click **Save**.

Configuring a Gift and Loyalty User Interface Touchscreen

1. Select the revenue center, and then click **Touchscreen Design** under either the workstation or Mobile MICROS device (depending on the device used to access Gift and Loyalty functions).
2. Insert a record for the Gift and Loyalty screen or select the existing screen for gift and loyalty functions.
3. Click the **Key** tab, and then enter the button name in the **Legend** field.
4. From the **Key Type** field, select **11 - Function**.
5. Click the **Key Number** arrow, and then select the appropriate gift or loyalty key function.
6. Position and size the button on the screen, and then click **Save**.
7. Repeat Steps 3 through 6 to add buttons for all supported Gift and Loyalty functions. The table below lists the Gift and Loyalty functions and descriptions.

Table 8-8 Gift and Loyalty Button Functions

Function	Description
Look Up Patron	Look up guest information by name, phone number, or account number.
Issue Points	Issue points to a loyalty account.
Redeem Points	Redeem points to apply toward the balance of a guest check.
Loyalty Points Inquiry	Request the points balance for a loyalty account.

Function	Description
Transfer Loyalty Points Balance	Transfer the points balance and guest personal information associated with one loyalty account number to another loyalty account.
Issue Coupon	Issue an ad hoc coupon from Gift and Loyalty Advanced to a guest loyalty account.
Redeem Coupon	Accept or redeem a coupon to apply towards the balance of a guest check.
Coupon Inquiry	Request a list of coupons available for a loyalty account.
Request Unique Items	Request a list of unique menu items that have been ordered on a program associated with a loyalty account.
Issue Gift Card	Issue a single SVC for a dollar value that the guest determines at the time of purchase.
Activate Gift Card	Activate a single pre-loaded (preset) value SVC. The system prompts the workstation operator for the pre-defined dollar value to validate.
Reload Gift Card	Add funds to a single existing SVC.
Cash Out Gift Card	Obtain a cash payment for the remaining balance on an SVC account.
Gift Card Balance Inquiry	Request the dollar value available on an SVC.
Transfer Gift Card Balance	Transfer the funds and guest personal information (if applicable) associated with one SVC to another SVC.
Redeem Gift Card	Pay for a guest check balance using an SVC.
Redeem Gift Card w/Authorization	Obtain authorization for the amount to be redeemed from the SVC.
Issue Batch of Gift Cards	Issue multiple SVCs for a dollar value that the guest determines at the time of purchase.
Activate Batch of Gift Cards	Activate multiple SVCs (the system prompts the workstation operator for the pre-defined dollar value to validate).

Using Loyalty and Stored Value Cards at the POS

After signing in to the POS client, the workstation operator can perform the following loyalty and stored value functions. When a loyalty or stored value account has multiple programs, the application prompts the workstation operator to select the program. The order in which the program prompt appears (before or after account number entry) varies depending on the function.

Looking Up a Patron

You can look up a guest's loyalty or stored value account if the guest information was entered through the Gift and Loyalty Advanced website.

1. Go to the gift and loyalty screen, and then press the function key to look up a patron.
2. Enter the loyalty cardholder's account number, guest name, or phone number.

Issuing Points

1. Begin a check, and then add items that trigger loyalty points.
2. Go to the gift and loyalty screen, and then press the function key to issue points.
3. Swipe the card or enter the loyalty account number.
4. When the POS shows a message indicating the points issuance:
 - If the loyalty account is associated with a Points to Dollars program and the customer reaches the threshold to award dollars to the stored value program, click **Yes** to redeem the gift card award immediately. If multiple stored value programs exist, select the stored value program.
 - If coupons are available, select a coupon from the list of coupons.
5. Perform either a service total or tender the check.

Redeeming Points

You can only redeem points for a Pay with Points loyalty program.

1. Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key to redeem points.
3. Swipe the card or enter the loyalty account number.
4. Perform one of the following operations:
 - Pay the full amount or full point balance (whichever is less).
 - Enter an amount.
 - Issue points (if a guest does not have enough points or decides not to redeem points).

Performing a Loyalty Balance Inquiry

You can perform this operation either during or outside of a transaction. When you perform a balance inquiry, you can only print the results (you cannot apply the balance to a check).

1. (Optional) Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key for a loyalty points inquiry.
3. Swipe the card, enter the card number, or look up the account by name or phone number. A message appears indicating the loyalty account balance.
4. Press **Yes** to print the chit.

Transferring Points Balance

You can perform this operation either during or outside of a transaction.

1. (Optional) Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key to transfer points balance.
3. Swipe the card or enter the card number of the account to transfer *from*.
4. Swipe the card or enter the card number of the account to transfer *to*.

Issuing Coupons

You can perform this operation either during or outside of a transaction.

1. (Optional) Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key to issue a coupon.
3. Swipe the card or enter the loyalty account number. A list of coupons appears.
4. Select a coupon.

Redeeming Coupons

1. Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key to redeem a coupon.
3. Enter the coupon number obtained from the Gift and Loyalty Advanced website or email.

Performing a Coupon Inquiry

You can perform this operation either during or outside of a transaction.

1. (Optional) Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key to look up coupons.
3. Swipe the card or enter the loyalty account number. A list of coupons appears.
 - If a check is open, select a coupon to redeem.
 - If a check is not open, press **Yes** to print the coupon.

Performing Unique Items Inquiry

You can perform an inquiry about unique items for round robin programs. You can perform this operation either during or outside of a transaction.

1. (Optional) Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key for unique items inquiry.
3. Swipe the card or enter the loyalty account number. A list of menu items that were ordered for the loyalty program appears.
4. (Optional) Print the list of items.

Issuing Gift Cards

1. Begin a check.
2. Go to the gift and loyalty screen, and then press the function key to issue a gift card.
3. Swipe the card or enter the card number.
4. Enter the card amount.
5. Pay the check to a tender, such as cash or credit card.

Activating Gift Cards

1. Begin a check.
2. Go to the gift and loyalty screen, and then press the function key to activate a gift card.
3. Swipe the card or enter the card number.
4. Enter the preset card amount.
5. Pay the check to a tender, such as cash or credit card.

Reloading Gift Cards

1. Begin a check.
2. Go to the gift and loyalty screen, and then press the function key to reload a gift card.
3. Swipe the card or enter the card number.
4. Enter the amount to add to the card.
5. Pay the check to a tender, such as cash or credit card.

Cashing Out Gift Cards

You must perform this operation outside of a transaction.

1. Go to the gift and loyalty screen, and then press the function key to cash out a gift card.
2. Swipe the card or enter the card number.
3. Pay the card balance as cash due to the guest.

Performing a Balance Inquiry

You can perform this operation either during or outside of a transaction. When you perform a balance inquiry, you can only print the results (you cannot apply the gift card balance to a check).

1. (Optional) Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key for gift card balance inquiry.
3. Swipe the card, enter the card number, or look up the account by name or phone number. A message appears showing the card account balance.
4. Press **Yes** to print the chit.

Transferring Gift Card Balance

You can perform this operation either during or outside of a transaction.

1. (Optional) Begin a check, and then add items.
2. Go to the gift and loyalty screen, and then press the function key to transfer the gift card balance.
3. Swipe the card or enter the card number of the account to transfer *from*.
4. Swipe the card or enter the card number of the account to transfer *to*.

Redeeming and Authorizing Gift Cards

This function is similar to a credit card authorization. The system verifies the amount available on the gift card, but it does not apply the amount to the check. You must redeem the gift card (see the Redeeming Gift Cards section) to finalize the amount.

1. Begin a check.
2. Go to the gift and loyalty screen, and then press the function key to redeem a gift card with authorization.
3. Swipe the card or enter the card number.
4. Enter the amount to authorize from the card.
 - If the amount is less than or equal to the gift card balance, the authorization succeeds. The authorization approves only the gift card balance.
 - If the amount exceeds the gift card balance, the authorization fails.

Redeeming Gift Cards

1. Begin a check.
2. Go to the gift and loyalty screen, and then press the function key to redeem a gift card.
3. Swipe the card or enter the card number.
4. Enter the amount to redeem from the card.
 - If the amount is less than or equal to the gift card balance, the card balance is applied to the check and deducted from the card.
 - If the amount exceeds the gift card balance, the full card balance is applied to the check and the card balance becomes \$0.00. Apply another tender (cash or credit card) to pay the remaining check balance.

Issuing a Batch of Gift Cards

You can use the Issue Batch function to issue multiple cards for the same amount (rather than issuing each one individually).

1. Begin a check.
2. Go to the gift and loyalty screen, and then press the function key to issue gift cards in bulk.
3. Select the stored value program, and then press **OK**.
4. Enter the card amount.
5. Enter the number of cards to issue, and then press **Yes** to confirm.
6. Swipe each card or enter each card number, and then press **OK** to confirm.
7. Pay the check to a tender, such as cash or credit card.

Activating a Batch of Gift Cards

1. Begin a check.
2. Go to the gift and loyalty screen, and then press the function key to activate gift cards in bulk.
3. Select the stored value program, and then press **OK**.
4. Enter the preset activation amount.
5. Enter the number of cards to activate, and then press **Yes** to confirm.
6. Swipe each card or enter each card number, and then press **OK** to confirm.
7. Pay the check to a tender, such as cash or credit card.

Reversing a Loyalty or Stored Value Operation

If you make an error while performing a loyalty or stored value card operation (for example, manually entering an incorrect number of cards during bulk issue or activation), you can reverse the operation (except for card redemption with multiple programs). You can either void or cancel the transaction, depending on whether the check is open or closed.

You cannot reverse operations using the following functions:

- Last Item Void (pressing Void two times without selecting a transaction on the check)
- Return (pressing Return and then add an item with a negative amount)

Reversing a Transaction in the Current Round on an Open Check

Perform one of the following steps to reverse a card operation for the current round on an open check prior to service total:

- With the check open and visible on the screen, press **Transaction Cancel** twice to cancel the entire current round.
- Select the Gift and Loyalty Advanced transaction in the check detail, and then press **Void** to cancel it.

Reversing a Transaction in the Previous Round After Service Total or Closed Check

Follow these steps to reverse a card operation for a previous round after performing a service total on an open check, or reopening a closed check.

1. If the check is closed, press the function key for **Edit or Reopen Closed Check**.
2. Select the Gift and Loyalty Advanced transaction in the check detail, and then press **Void**. (After the Void operation, you cannot cancel the transaction.)
3. Perform a service total, or pay the check to the correct tender type and amount.

Reversing a Gift Card Redemption with Multiple Stored Value Programs

You cannot reverse a stored value card redemption when the card links to multiple stored value programs. In this scenario, you must reload the stored value card on the same check. The system then reapplies the funds deducted.

- If the check is closed, begin with step 1.
- If the check is open, sign in, pick up the check, and begin with step 2.
 1. Press the function key for **Edit or Reopen Closed Check**.
 2. Go to the gift and loyalty screen, and then press the function key to reload a gift card.
 3. Swipe the card or enter the card number.
 4. Enter the amount to add to the card. (This is the amount for which the card was redeemed.)
 5. Pay the check to the correct tender type and amount.

9 Menu Item Waste

Understanding Menu Item Waste Checks

In restaurants, menu item waste describes discarded menu items resulting from spillage, spoilage, or compromised quality standards. There are four main characteristics of the menu item waste check:

1. A menu item waste check does not post to sales.
2. Inventory is depleted when the application posts waste.
3. A menu item waste check closes after posting. (Service Total, Cash, and Print functions all close a waste check.)
4. Wasted menu items appear in the waste reports. Managers can generate waste reports by revenue center, menu item, employee, and waste reason code. Depending on the reasons for waste, managers can take action to reduce inventory loss.

When menu item waste occurs, authorized workstation operators can begin a menu item waste check and then enter wasted menu items.

The table below lists the functional differences between menu item waste checks and guest checks.

Table 9-1 Differences Between Waste Checks and Guest Checks

Function	Menu Item Waste Check	Guest Check
Order devices (kitchen displays, printers) print items post as part of check	No	Yes
Re-open/adjust closed check	No	Yes
Apply discount	No	Yes
Apply service charge	No	Yes
Return item	No	Yes
Edit seat	No	Yes
Split check	No	Yes
Tender check to credit card, room charge, or gift card	No	Yes
Send and Stay	No	Yes
Autofire	No	Yes
Use team member functionality	No	Yes

Configuring Menu Item Waste

Adding a Declare Waste Button

1. Select the revenue center, and then click **Touchscreen Design** under the workstation.
2. Select the screen on which to place the **Declare Waste** button.
3. From the **Key Type** field, select **11 - Function**.
4. Click the **Key Number** arrow, and then select the **Declare Waste** function.

5. Position and size the button on the screen, and then click **Save**.

Allowing Employees to Begin Waste Checks

1. Select the enterprise, click **Personnel**, and then click **Roles**.
2. Click the **Operations** tab, and then click the **Guest Checks** subtab.
3. To allow the employee to begin a menu item waste check or authorize another employee to do the same, select **Authorize/Begin Menu Item Waste Check** in the **Guest Check Control Options**.

Configuring Waste Reasons

When adding menu items to a waste check, the application prompts the workstation operator to select a reason for wasting the items.

1. Select a property, and then click **Property Descriptors**.
2. On the **General** tab under Waste Reason Codes, enter the waste reasons.
3. Click **Save**.

Hiding Price Details on Waste Checks

Unlike a guest check that posts menu item price details, a waste check measures the cost of wasted inventory. Follow these steps if you do not want waste checks to display or print waste item price details.

1. Select the revenue center, click **RVC Parameters**, and then click the **Format** tab.
2. In the Format Options section, select option **47 - Do not display/print price for Waste**.
3. Click **Save**.

Configuring Waste Receipt Headers and Trailers

When the workstation operator posts a waste check, the printer assigned to the workstation prints a waste receipt.

1. Select the revenue center, and then click **RVC Descriptors**.
2. On the **Printing** tab, scroll to the Waste Receipt Header section. To add a trailer, scroll to the Waste Receipt Trailers section.
3. Do one of the following:
 - To add text, click the lines under the **Text** tab, and then enter the text.
 - To add a logo, select the checkbox under the **Use Logo** column, and then select a logo from the drop-down list.
4. Click **Save**.

Using Menu Item Waste Checks

Declaring Waste

1. Click the **Declare Waste** button.
2. Select the quantity (if applicable), and then select the menu item to add to the waste check.
3. Select a waste reason, and then click **OK**.
4. (Optional) Repeat Steps 2 and 3 to add items to the waste check.

5. Perform a service total on the check. A waste receipt prints. The workstation closes the waste check.

After service total, the POS client does not send a waste check to the kitchen, and the waste check does not appear on screen lookups.

Correcting Waste Checks

When you over-post menu items on a waste check, you must post a negative waste check to offset the over-posted menu items.

1. Click **Transaction Void**, and then click **Declare Waste**.
2. Select the menu items to remove from the waste check.
3. Select a waste reason, and then click **OK**.
4. (Optional) Repeat Steps 2 and 3 to correct additional entries.
5. Perform a service total on the check. If configured, a waste check chit prints with the corrected menu items.

10 Printers

Prerequisites for the Oracle MICROS KW270 Workstation and Epson TM-P60II Printer

Obtain the following items:

- Keyboard Workstation 270 (KW270) platform version 1.7 or later. Download the latest platform from My Oracle Support at <https://support.oracle.com>.
- Epson TM-P60II printer with a USB cable.

Configuring the Epson TM-P60II Printer on the Oracle MICROS KW270 Workstation

1. Connect the USB printer cable to the Epson TM-P60II printer port that is adjacent to the hinge of the paper door.
2. Connect the other end of the cable to an open USB port on the KW270 workstation.
3. From the EMC, select the property, and then click **Printers**.
4. Insert a new record, enter the printer name, and then click **OK**.
5. Double-click the new record to open it in form view.
6. From the **Workstation** drop-down list, select the **KW270** to which the printer is connected.
7. Select **Epson RS232 Roll Printer** as the **Printer Type**.
8. Select **COM8** as the **COM Port**.
9. Click **Save**.
10. Select the property, and then click **Workstations**.
11. Double-click the record associated with the KW270 workstation to open it in form view.
12. Click the **Printers** tab, and then assign the printer record that you created in Step 4 to the appropriate print jobs.
13. Click **Save**.
14. Reload the database on the KW270 workstation.

Prerequisites for PMC Reports on the Oracle MICROS KW270 Workstation

Ensure that:

- The KW270 workstation is configured.
- Workstation reports are configured and are accessible by other Microsoft Windows CE and Microsoft Windows 32 devices.
- The KW270 keyboard is configured with a PMC button, numeric keys, and a button for performing a database download.

Configuring PMC Reports for the Oracle MICROS KW270 Workstation

1. Select the property, and then click **Workstation Autosequences**.
2. Insert a new record, enter the report name, and then click **OK**.
3. Double-click the new record to open it in form view.
4. On the **General** tab, select **1 - Report** in the **Step Type** column.
5. Click the **Configure** button next to the **1 - Report** step type, and then select one of the following supported reports:
 - Revenue Center Financial Report
 - Employee Financial Report
 - Cashier Financial Report
6. From the **Period** drop-down list, select **3 - Today** or **4 - Yesterday**.
Do not use the **Inherit** or **Prompt** period options.
7. From the **View** drop-down list, select **2 - Revenue Center**, and then select the revenue center corresponding to the workstation.
8. From the **Print/Display** drop-down list, select **1 - Print Only**, click **OK**, and then click **Save**.
9. Click the **Options** tab, and then select the following options:
 - **5 - Sign Off Employee When Autosequence is Complete**
 - **7 - Use Signed In Employee's RVC for RVC-Scope Reports**
 - **9 - Warn if WS offline during report generation**
10. Select the **Privilege Group** that can generate the report, and then click **Save**.
11. Repeat Steps 2 through 10 for the remaining reports.
12. Reload the database on the KW270 workstation.

Printing PMC Reports from the Oracle MICROS KW270 Workstation

You must have the appropriate privileges to run PMC Reports.

Press the **PMC** button, press the number that corresponds to reports, and then press **Enter**.

Press the number that corresponds to the report that you want to print, and then press **Enter**.

If you receive a message stating that other workstations are offline, press the **Enter** or **Yes** button to print the report.

11 Kitchen Display System (KDS)

An order device refers to a piece of hardware used to communicate order information to a preparation area. An order device may be a printer or a Kitchen Display System (KDS). A KDS displays orders sent for preparation on a screen as opposed to physical order receipts.

Understanding KDS Controllers

A KDS Controller is an application that runs as a Windows service on an on premise service host. It is responsible for managing all of the business logic associated with the KDS. The KDS Controller moves data to and from KDS Displays, provides KDS Displays with their configuration information, and maintains detailed order activity in the kitchen. All updates to KDS Displays (changing a toolbar or bump bar button) are routed through the KDS Controller.

KDS Setup for a Microsoft Windows 32 Client

This section describes how to set up KDS for use on a Microsoft Windows PC (2003/XP).

Configuring the KDS Controller

1. Select the property, and then click **KDS Controllers**.
2. Insert a new record, enter a record name, and then click **OK**.
3. Configure the Options, status color fields, and Database Update Frequency according to the site's preference.
4. Click the **Service Host** tab.
5. Click the **Select** adjacent to the **Service Host** field, select the Microsoft Windows 32 service host that is going to run the KDS display, and then click **OK**.
This lets the system know which computer will be running the KDS service. This is separate from running the KDS Display screen.
6. Click **Save**.

Configuring a KDS Display

1. Select the property, and then click **KDS Displays**.
2. Insert a new record, enter a record name, and then click **OK**.
3. From the **KDS Controller** drop-down list, select the Microsoft Windows 32 client KDS Controller.
4. In the **IP Address** field, enter the IP address for the Microsoft Windows 32 client that is going to use the KDS Display.
5. Select a **Tool Bar**, and then configure the Display Screen Options, Chit Display Options, and the SOS Display Options (if applicable) according to the site's preference.
6. Click **Save**.

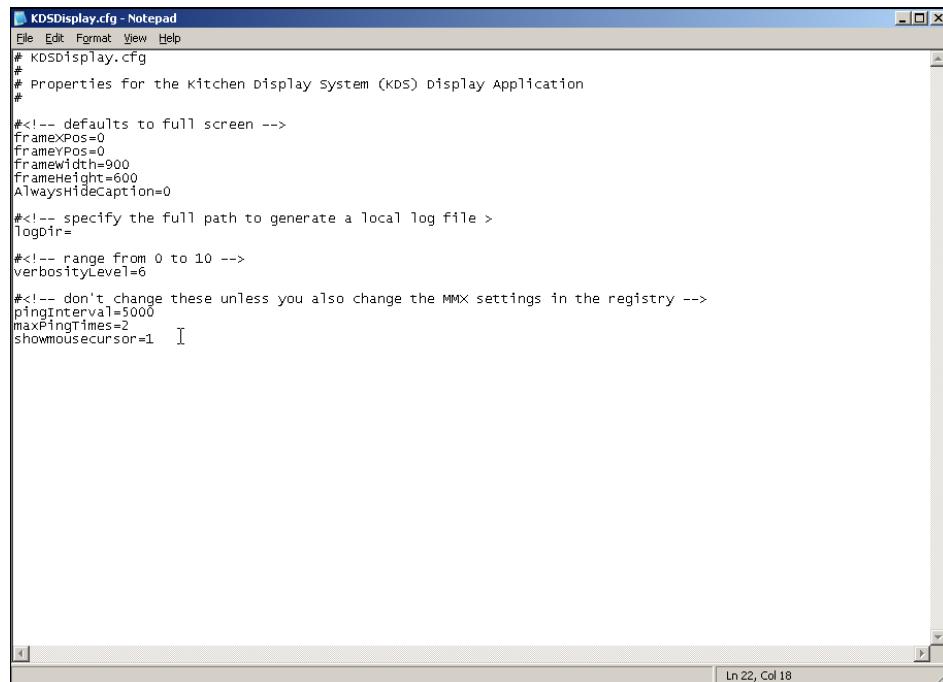
Configuring the Client Application Loader (CAL) Package

1. Select the Enterprise, and then click **CAL Packages**.
2. Select **Symphony KDS Client** from the left pane, and the click **Add** under the Deployment section.
3. Select **2 - Specific Service Host** as the **Deployment Type**, and then select the Microsoft Windows 32 client to receive the KDS application.
The KDS application will start the KDS Display not the KDS service on the client.

4. Select **KDS Handler** from the left pane, and the click **Add** under the Deployment section.
5. Select **2 - Specific Service Host** as the **Deployment Type**, and then select the name of the Microsoft Windows 32 client to receive the KDS service. The KDS service can be restarted in the future for troubleshooting KDS on the Microsoft Windows 32 client.
6. Click **Save**. After a few moments, CAL starts the process of installing all necessary files to run KDS from the client.
7. After CAL completes the installation, open services to verify the MICROS KDS Controller service has started.
8. To run the KDS Display on the Microsoft Windows 32 client, click **Start**, click **All Programs**, click **Micros Applications**, and then click **Start KDS**.

Adjusting the KDS Screen Size

1. Browse to [Drive Letter]:\Micros\KDS\ETC and open the KDSDisplay.cfg file.
2. Enter values for frameWidth and frameHeight to best show all available buttons and to best fit the screen.
3. To show the display border, set AlwaysHideCaption to 0 (zero).
4. To show the mouse cursor, add the setting showmousecursor=1 to the line after maxPingTimes.
5. Restart the KDS application for the settings to take effect.



```
KDSDisplay.cfg - Notepad
File Edit Format View Help
# KDSDisplay.cfg
#
# Properties for the Kitchen Display system (KDS) Display Application
#
#<!-- defaults to full screen -->
frameXpos=0
frameYpos=0
frameWidth=900
frameHeight=600
AlwaysHideCaption=0

#<!-- specify the full path to generate a local log file >
logdir=

#<!-- range from 0 to 10 -->
verbosityLevel=6

#<!-- don't change these unless you also change the MMX settings in the registry -->
pingInterval=3000
maxPingTimes=2
showmousecursor=1
```

Figure 11-1 KDSDisplay.cfg File

12 Importing and Exporting Data

The Import/Export Service (formerly Data Access Utility) allows you to:

- Import and export Simphony First Edition application data in a comma-separated values (CSV) format, to or from spreadsheet applications
- Import configuration data into the Simphony First Edition application database that can be called by external systems, such as a web service application programming interface (API)
- Export configuration data from Simphony First Edition that can be called by external systems, such as an on premise inventory management application

The main benefits of this service are:

- Allows you to load configuration data in bulk (for example, making a large number of price changes for menu items, which reduces the amount of time it takes to configure systems)
- Allows third parties to integrate with customer databases (either self-hosted or hosted within an Oracle facility), without providing direct access to the application file server or database
- Allows third parties to build custom interfaces

The Import Export Service is run from a command line interface. On the application server, the utility exists in the [Drive letter]:\Micros\Simphony\Tools\ImpExp directory.

The *Oracle Hospitality Simphony First Edition Data Access Service* document on the My Oracle Support contains more information on the Import/Export Service.

Workstation Status/Control

Beginning with Simphony First Edition version 1.7.6, the Workstation Status/Control module has been reintroduced to the application. The Workstation Status/Control is an EMC module that lets you view the current status of workstations on a property. You must ensure that each supported workstation is first upgraded to version 1.7.6 in order for you to review its live status. You can also access workstations and upload, view, or save files stored on the workstation to your computer. There are numerous other columns that provide you with a comprehensive listing of additional workstation connectivity and operational information.

Workstation Status

The Workstation Status/Control module is opened from the Property level. When the module initially opens, the form shows a grid containing all the workstation records from the currently selected property.

Filter Box

The **Show Records Where** filter drop-down list includes fields that allow you to see only certain workstations based on specified criteria. The filter parameters are based on the column headings contained within the module's table grid.

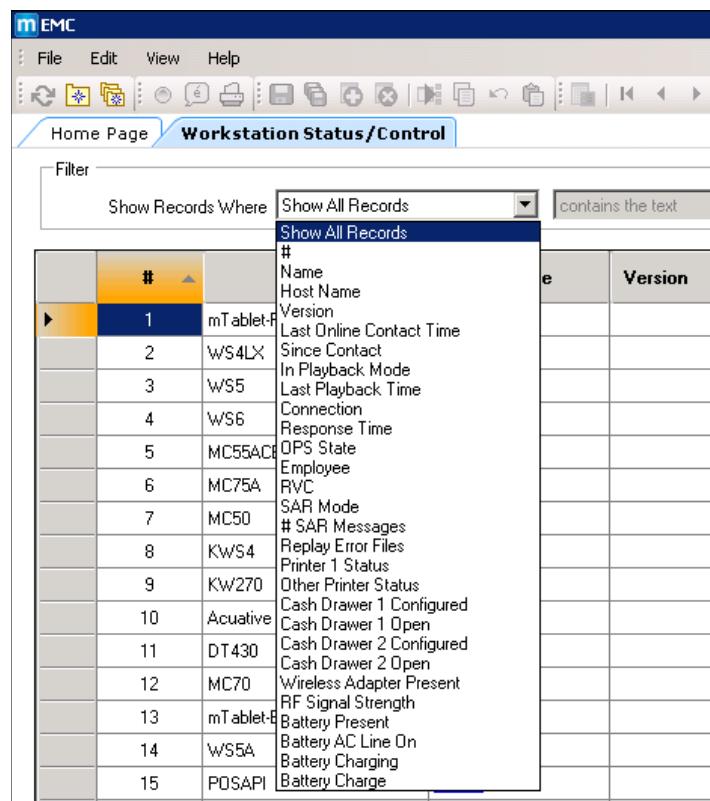
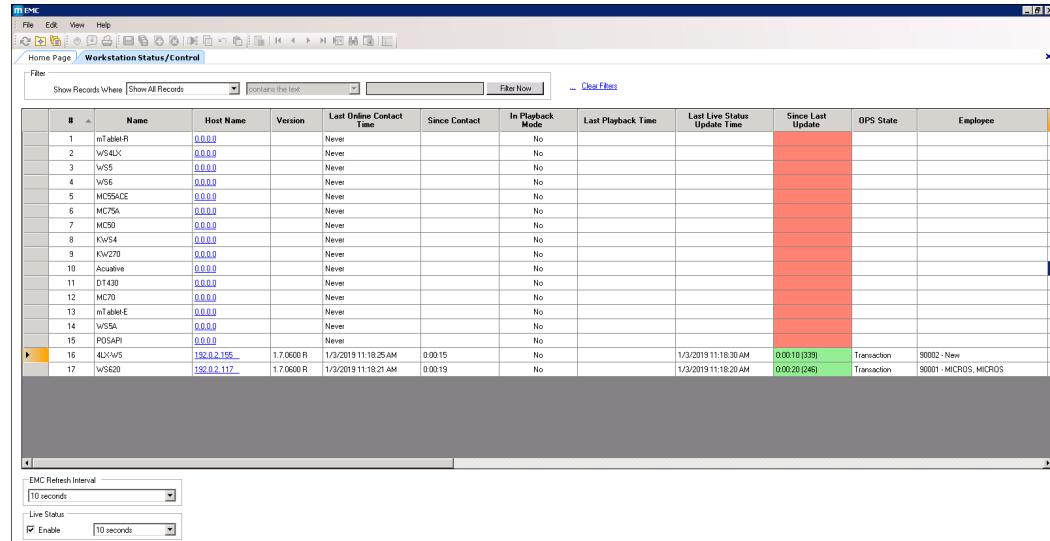


Figure 13-1 Workstation Status/Control - Filter Box

Workstation Status/Control Grid

The Workstation Status/Control grid shows the information related to each workstation in the property. The columns show data that is located and stored in the transaction database.



#	Name	Host Name	Version	Last Online Contact Time	Since Contact	In Playback Mode	Last Playback Time	Last Live Status Update Time	Since Last Update	OPS State	Employee
1	m7ableR	0.0.0		Never		No					
2	VS4LX	0.0.0		Never		No					
3	VS5	0.0.0		Never		No					
4	VS6	0.0.0		Never		No					
5	MC55ACE	0.0.0		Never		No					
6	MC75k	0.0.0		Never		No					
7	MC50	0.0.0		Never		No					
8	KW54	0.0.0		Never		No					
9	KW270	0.0.0		Never		No					
10	Acuative	0.0.0		Never		No					
11	D1430	0.0.0		Never		No					
12	MC70	0.0.0		Never		No					
13	m7ableE	0.0.0		Never		No					
14	VS55A	0.0.0		Never		No					
15	POSAPI	0.0.0		Never		No					
16	4DxW5	132.0.2.156	1.7.0600 R	1/3/2019 11:18:25 AM	0.0015	No	1/3/2019 11:18:30 AM	00:00:10 (339)	Transaction	90002 - New	1
17	WS620	132.0.2.117	1.7.0600 R	1/3/2019 11:18:21 AM	0.0019	No	1/3/2019 11:18:20 AM	00:00:20 (246)	Transaction	90001 - MICROS, MICROS	2

Figure 13-2 Workstation Status/Control Grid

The following columns are shown in the grid:

Table 13-1 Workstation/Control Grid Columns

Column Name	Description
#	This column shows the object number of the workstation.
Name	This column shows the name of the workstation.
Host Name	This column shows the Host Name (or IP Address) of the workstation. When this link is clicked, the EMC shows a new page with detailed workstation information.
Version	This column shows the current version of the workstation client. This information is obtained from a database query that occurs at the interval determined by the Last Contact Timer field setting.
Last Online Contact Time	This column shows the last contact time between the database and the workstation client while the workstation was online. Workstations periodically make requests to obtain any changed records; during this process, the Last Contact Time for the workstation is updated. This information is obtained from a database query that occurs at the interval determined by the Last Contact Timer field setting. This time reflects the local time of the application server.
Since Contact	This column shows the time elapsed since between the Last Contact column and the current date/time. This value does not update in real-time, rather it updates at the interval determined by the Last Contact Timer field setting.
In Playback Mode	This column shows the state of the workstation and its offline transactions if the workstation is currently replaying its checks, or not.

Column Name	Description
Last Playback Time	If a workstation is currently replaying its checks, this column shows the time of the last check that was replayed.
Last Live Status Update Time	This column shows data only when Live Status is enabled. This column shows the last time that a workstation's live status information was written to the database.
Since Last Update	This column shows data only when Live Status is enabled. This column shows the elapsed time it takes between the Last Live Status Update Time and the current date and time. Note: This value does not update in real-time, rather it updates based on the configuration of the EMC Refresh Interval setting. The content in this column is color coded. The colors signify: <ul style="list-style-type: none"> Green indicates that the elapsed time between the Last Live Status Update time and the current time is less than three minutes. Yellow indicates that the elapsed time between the Last Live Status Update time and the current time ranges between three to five minutes. Red indicates that the elapsed time between the Last Live Status Update time and the current time exceeds five minutes.
OPS State	This column shows data only when Live Status is enabled and a connection to the workstation has been received. What shows here represents the current activity on the workstation, including: Idle, Sign-In, or Transaction.
Employee	This column shows data only when Live Status is enabled. If the OPS State field is Sign-In or Transaction, this field shows the employee who is signed onto the workstation.
RVC	This column shows data only when Live Status is enabled. This field shows the revenue enter (RVC) of the current activity.
SAR Mode	This column shows data only when Live Status is enabled. This field shows Yes or No to indicate if the workstation is in Stand-Alone Resilient (SAR) mode.
# SAR Messages	This column shows data only when Live Status is enabled. This field shows Yes or No to indicate if the workstation is in SAR mode.
Replay Error Messages	This column shows data only when Live Status is enabled. This field shows Yes or No to indicate if the workstation contains any failed offline replay messages.
Printer 1 Status	This column shows the status of Printer 1, if configured
Other Printer Status	This column shows the status of the Other Printer, if configured
Cash Drawer 1 Configured	This column shows Yes if the workstation is configured with 1 or 2 Cash Drawers; otherwise, this column shows No .
Cash Drawer 1 Open	This column shows Yes if the first cash drawer of the workstation is open; otherwise, this column shows No . No always shows if Cash Drawer 1 Configured is No .
Cash Drawer 2 Configured	This column shows Yes if the workstation is configured with 2 Cash Drawers; otherwise, this column shows No .

Column Name	Description
Cash Drawer 2 Open	This column shows Yes if the second cash drawer of the workstation is open; otherwise, this column shows No . No always shows if Cash Drawer 2 Configured is No .

* The Printer 1 and Other Printer designations are determined by the Print Controller settings configured in the Printers (EMC Module) where Printer 1 is the Printer with the lower of the two object numbers. In the event that many Printers are using the same Printer Controller (not recommended), the status is only be made available for the two Printers with the lowest object numbers.

Column Name	Description
Wireless Adapter Present	This column shows Yes when the client type has a wireless adapter; otherwise, this column shows No . No is always showed for wireless Oracle MICROS workstations.
RF Signal Strength	This column indicates the numerical signal strength percentage and always shows No if there is no Wireless Adapter Present.
Battery Present	This column shows Yes when the client type is able to run on battery power; otherwise, this column shows No .
Battery AC Line On	This column shows either Yes or No ; Yes shows for any workstation running on AC, regardless of whether or not a battery actually exists.
Battery Charging	This column shows either Yes or No ; No always shows if there is no Battery Present.
Battery Charge	This column indicates the numerical battery charge percentage and always shows 0 if there is no Battery Present. Note that this cell is highlighted in RED once the Battery Charge falls below 60%. This threshold differs from that which is seen when initiating the Enter Workstation Status Mode - function key 317.

Timer and Status Fields

When the EMC Refresh Interval is enabled, it increases traffic on your network. Oracle recommends using the default settings for these values. In addition, Oracle recommends closing this module when it is not being used, to prevent excess network traffic.

Below the grid, there are two timer boxes:

Table 13-2 Last Contact Timer and Status Settings

Column Name	Description
EMC Refresh Interval	This drop-down list controls the intervals between database reads to obtain the Version, Last Live Status Update Time, and Since Last Update data. The available settings are ten seconds (default), thirty seconds, one minute, or two minutes.
Live Status	The Enable checkbox and drop-down list determines the request interval. When enabled, the grid updates the Last Live Status Update Time column and all associated columns. The available settings are ten seconds (default), thirty seconds, one minute, or two minutes.

Workstation Status Page

After the **Host Name** for a workstation has been clicked, the EMC shows the status of a workstation. In the example image, a workstation named '4LX-W5' was clicked. The page shows many of the same fields from the workstation grid, and a few additional fields. In addition, three Operations links are showed:

- **Files**

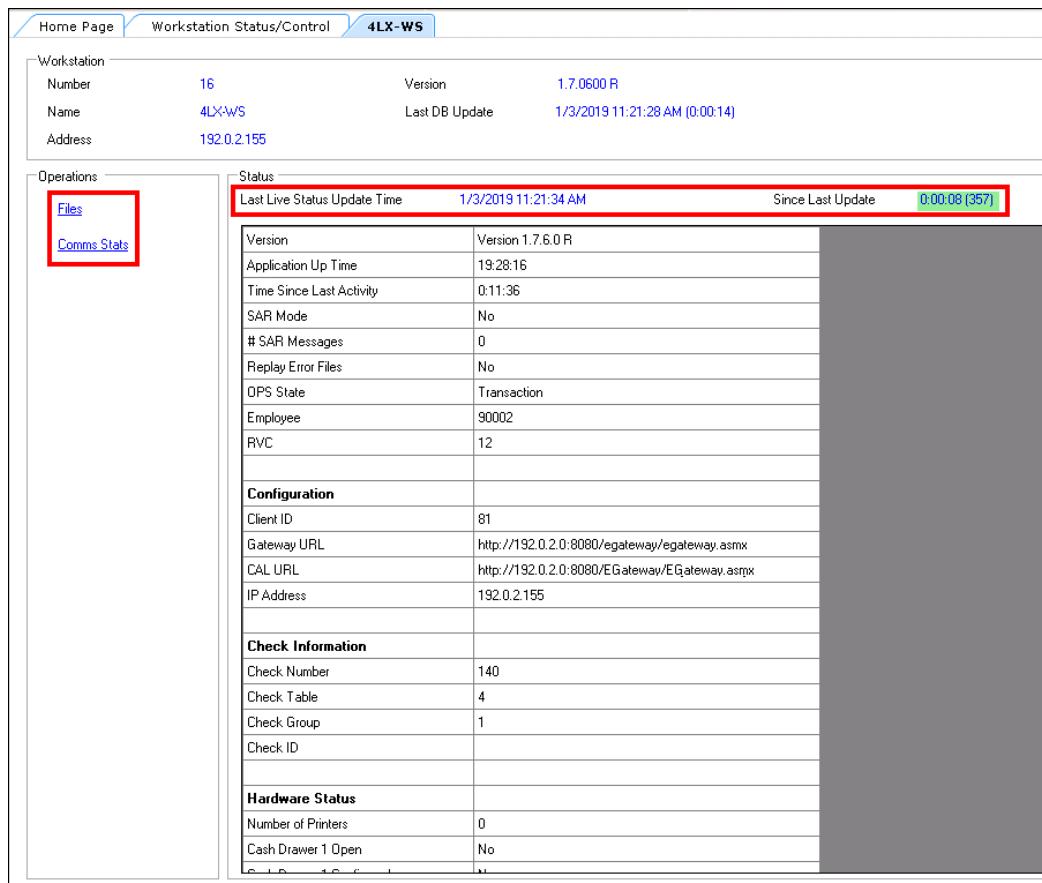
When this link is clicked, a dialog shows all the log files from the workstation. From here, the user may select a log and view or save a text document or executable. Beginning with Simphony First Edition version 1.7.6, this field allows access to all directories and files under the application's root directory.

- **Comms Stats**

When this link is clicked, a text file shows a diagnostics summary of incoming and outgoing messages for the workstation.

- **Additional Status Fields**

The **Last Live Status Update Time** and **Since Last Update** fields also appear on this page. They behave like and show the same information as the columns (of the same name) from the Workstation Status/Control tab.



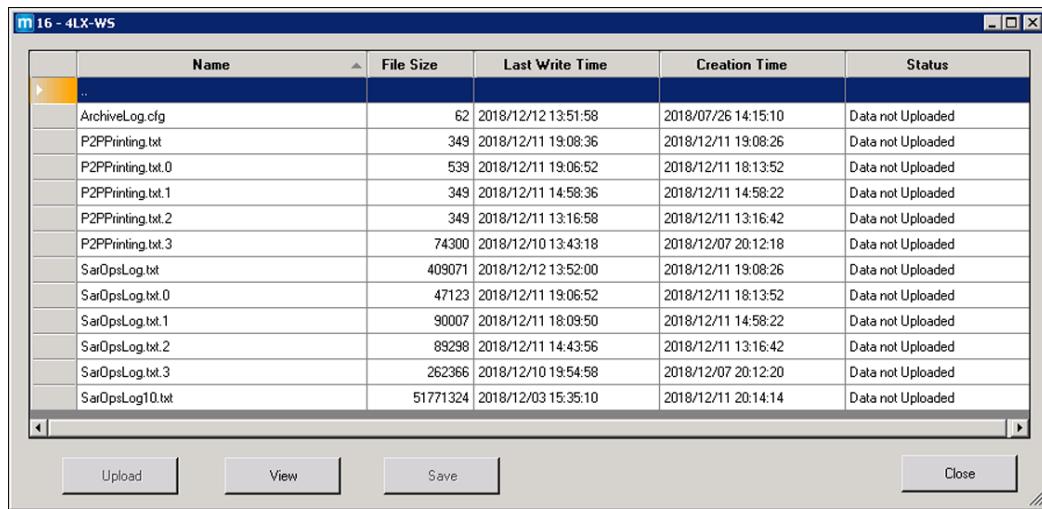
Workstation Status/Control			
4LX-W5			
Workstation			
Number	16	Version	1.7.0600 R
Name	4LX-W5	Last DB Update	1/3/2019 11:21:28 AM (0:00:14)
Address	192.0.2.155		
Operations			
	Files	Last Live Status Update Time	1/3/2019 11:21:34 AM
	Comms Stats	Since Last Update	0:00:08 (357)
		Version	Version 1.7.6.0 R
		Application Up Time	19:28:16
		Time Since Last Activity	0:11:36
		SAR Mode	No
		# SAR Messages	0
		Replay Error Files	No
		OPS State	Transaction
		Employee	90002
		RVC	12
		Configuration	
		Client ID	81
		Gateway URL	http://192.0.2.0:8080/egateway/egateway.asmx
		CAL URL	http://192.0.2.0:8080/EGateway/EGateway.aspx
		IP Address	192.0.2.155
		Check Information	
		Check Number	140
		Check Table	4
		Check Group	1
		Check ID	
		Hardware Status	
		Number of Printers	0
		Cash Drawer 1 Open	No

Figure 13-3 Workstation Status Page

Accessing Files on Workstations

When you want to access files on a workstation, click the **Files** link, and a window appears that lists the file structure located on the workstation. From here, you can:

- Navigate the folders and files on the workstation
- Upload and view files
- Upload and save workstation files to your local computer



	Name	File Size	Last Write Time	Creation Time	Status
▶	..				
	ArchiveLog.cfg	62	2018/12/12 13:51:58	2018/07/26 14:15:10	Data not Uploaded
	P2PPrinting.txt	349	2018/12/11 19:08:36	2018/12/11 19:08:26	Data not Uploaded
	P2PPrinting.txt.0	539	2018/12/11 19:06:52	2018/12/11 18:13:52	Data not Uploaded
	P2PPrinting.txt.1	349	2018/12/11 14:58:36	2018/12/11 14:58:22	Data not Uploaded
	P2PPrinting.txt.2	349	2018/12/11 13:16:58	2018/12/11 13:16:42	Data not Uploaded
	P2PPrinting.txt.3	74300	2018/12/10 13:43:18	2018/12/07 20:12:18	Data not Uploaded
	SarOpsLog.txt	409071	2018/12/12 13:52:00	2018/12/11 19:08:26	Data not Uploaded
	SarOpsLog.txt.0	47123	2018/12/11 19:06:52	2018/12/11 18:13:52	Data not Uploaded
	SarOpsLog.txt.1	90007	2018/12/11 18:09:50	2018/12/11 14:58:22	Data not Uploaded
	SarOpsLog.txt.2	89298	2018/12/11 14:43:56	2018/12/11 13:16:42	Data not Uploaded
	SarOpsLog.txt.3	262366	2018/12/10 19:54:58	2018/12/07 20:12:20	Data not Uploaded
	SarOpsLog10.txt	51771324	2018/12/03 15:35:10	2018/12/11 20:14:14	Data not Uploaded

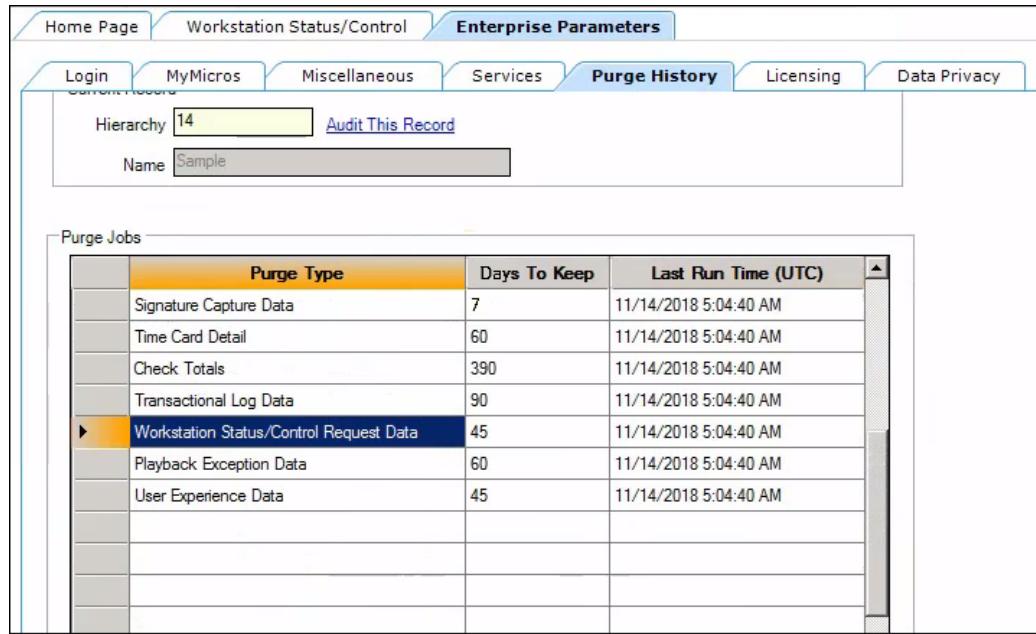
Figure 13-4 Workstation Status/Control Workstation File Access

To view or save files:

1. Double-click the gray box adjacent to the file that you want to access.
2. Click the **Upload** button.
3. The **Status** column shows that the file is **Uploading**
4. Eventually, the Status column indicates that it is **Ready**.
5. Once ready, click the **View** button and read the contents of the selected file.
6. If you want to copy the file to your local computer, click the **Save** button and designate where on your computer you want to save the file.

Purging Workstation Status/Control Data

The data for the Workstation Status/Controls module is purged from the system. The task is configured by accessing the **Enterprise Parameters**, **Purge History** tab. The **Workstation Status/Control Request Data** purge job's default setting is 45 days. The minimum **Days To Keep** entry for this task is 30 days and the maximum entry is 90 days.



Purge Type	Days To Keep	Last Run Time (UTC)
Signature Capture Data	7	11/14/2018 5:04:40 AM
Time Card Detail	60	11/14/2018 5:04:40 AM
Check Totals	390	11/14/2018 5:04:40 AM
Transactional Log Data	90	11/14/2018 5:04:40 AM
Workstation Status/Control Request Data	45	11/14/2018 5:04:40 AM
Playback Exception Data	60	11/14/2018 5:04:40 AM
User Experience Data	45	11/14/2018 5:04:40 AM

Figure 13-5 Workstation Status/Control Data Purge Job

Identifying a Concession Workstation

You can identify the workstations used for concession sales in the EMC. You can also view the total number of concession workstations in your Enterprise from the **Licensing** tab in the Enterprise Parameters module.

1. Select a property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation.
3. Click the **Options** tab, and then click the **Offline/Misc.** subtab.
4. Select option **59 - Concessions terminal**.
5. Click **Save**.
6. Repeat steps 2 through 5 for each concession workstation.

14 Workstation Touchscreens

Understanding Touchscreens

A touchscreen is a computer monitor which can detect the location of touches within the display area. This functionality allows you to use the display as an input device, without the need for a keyboard or mouse. MICROS hardware has utilized touchscreen functionality for decades; in most installations, touchscreen workstations are the primary ordering devices for end users.

Workstations that use Touchscreen Technology

With the exception of Keyboard Workstations, all MICROS workstations are designed to use touchscreen technology.

Maintenance and Care

To get the most life out of a workstation's touchscreen, follow these guidelines:

- When touching the screen, use the fleshy part of your fingertip. Avoid using pens, pencils, pencil erasers, or the corner of your mag card.
- Do not drag your finger on the screen. Over time, this could cause the screen to lose its calibration. Currently, MICROS touchscreen technology does not support multi-touch user interfaces.
- To clean a workstation's touchscreen, use a damp cloth with water. Avoid using chemicals.

Touchscreen Areas

The following table describes the different touchscreen areas in a workstation. The location of a touchscreen areas can vary depending on the page template, but the information shown within the area is consistent between all of the templates.

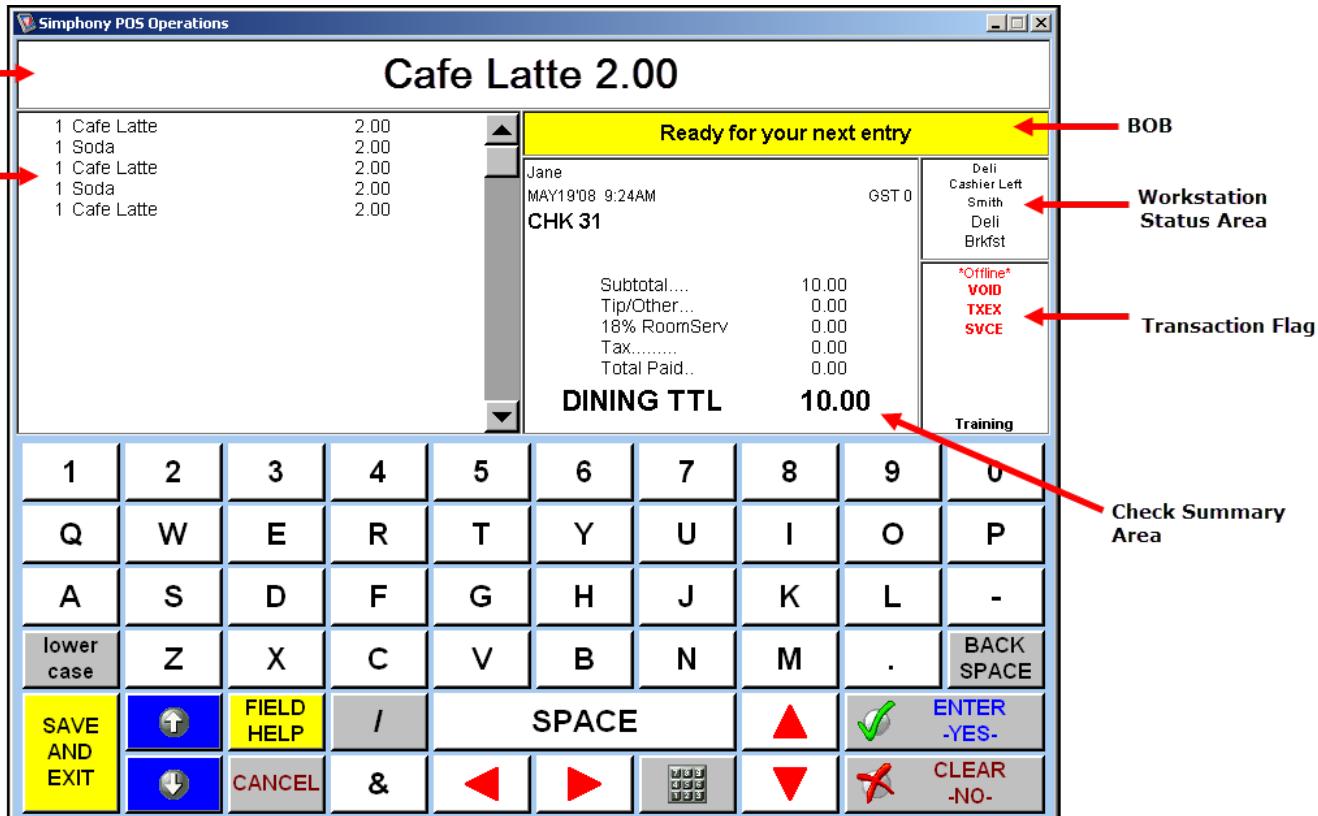


Figure 14-1 Sample Workstation Transaction Page

Table 14-1 Workstation Touchscreen Areas

Touchscreen Area	Description
Check detail area	<p>This area shows all the menu items, tenders, service charges, and discounts ordered. The location of this area varies from one touchscreen template to another.</p> <p>The check detail area shows items with symbols, indicating the status of an item. For example:</p> <ul style="list-style-type: none"> Previous round items show an asterisk (*). Previous round items that are repeatable with the Repeat Round function key show a right arrow (<). Items on hold show an H symbol. If the item is on hold from a previous round, it shows both the H and the asterisk (*) symbol.

Touchscreen Area	Description
Check summary area	<p>This area shows:</p> <ul style="list-style-type: none"> • The name of the check operator • The date/time the check was opened • The number of guests • The check number • The subtotal • Tips • Taxes • The Total paid • The order type of a transaction • Automatic service charges (if any)
Last entry area	This area shows the last action performed or the last item ordered. This area is always appears at the top of the screen.
Transaction flag area	<p>This area shows various flags relevant to the transaction. These flags include:</p> <ul style="list-style-type: none"> • Void/return indicator • Offline indicator • Tax Exempt flag • Auto service charge exemption flag • Training Mode indicator
Workstation status area	<p>This area shows:</p> <ul style="list-style-type: none"> • The revenue center name • The workstation name • The signed-in user's name • The active Menu Levels

Touchscreen Bitmap

A Touchscreen Bitmap is a bitmap that is displayed on touchscreens. Generally speaking, a Touchscreen Bitmap has no functional usage; its purpose is decorative only.

EMC Configuration

The **Touchscreen Bitmaps** module is accessed from the Enterprise Scope. The only configurable field is the name of the record. The image that is associated with the record can be added in Form View, using one of these two buttons:

Load Image

When this button is used, the standard Windows file dialog allows the programmer to select an existing bitmap image.

Paste Image

This button lets the programmer paste an image that is stored on the computer's clipboard. Note that the image should be on the clipboard, not a file containing the image. For example, if a user copies a bitmap file and attempts to paste it, an error occurs. However, if a user opens the bitmap file (perhaps using Microsoft Windows Paint) and selects its content, this data can be pasted.

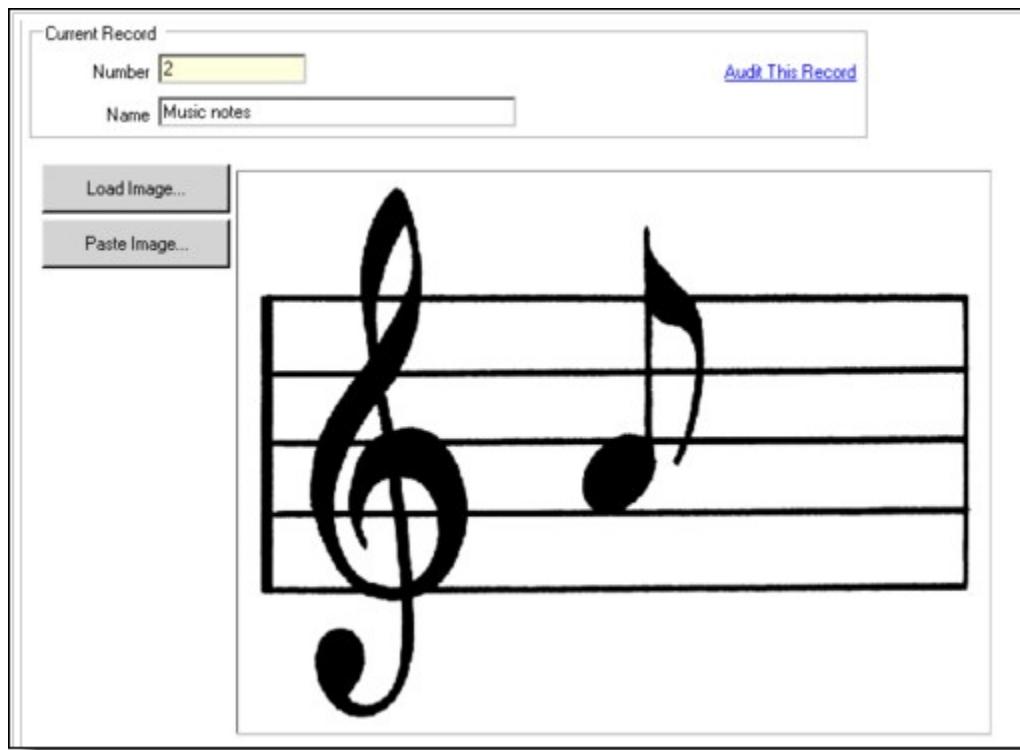


Figure 14-2 Adding Touchscreen Bitmaps

Adding a Bitmap to the Screen

Touchscreen Bitmaps appear on workstations when they are assigned to Touchscreen Keys.

Size

There are no size limitations enforced by EMC. However, when a workstation is required to download several large images, this increases network traffic and may also cause slow operations on the machine. Bitmaps over 1 MB can fail to download to the WS. Large bitmaps and large numbers of bitmaps should be avoided.

Color Depth

When images are used on Windows CE clients, these workstations display images using high color (16 bits). If the bitmap is using true color (24-bit), or another greater color depth, a conversion must take place each time the image is drawn to the screen. To increase performance on these workstation types, Oracle Hospitality recommends that 16-bit images are used; this is especially true for larger images being used as backgrounds.

Touchscreen Templates

A touchscreen template determines the layout of the touchscreen areas on a touchscreen. Currently, touchscreen templates are not user-configurable. By default, eight touchscreen templates are provided with Simphony First Edition (six for regular workstations and two for Mobile workstations).

Comparison of Touchscreen Templates

In the Touchscreen Design EMC module, each touchscreen is assigned a touchscreen template. The following table compares the different touchscreen templates that are available:

Table 14-2 Touchscreen Template Comparison

#	Template Name	No. of Rows	No. of Columns	Common/Preferred Usage	Available on MMH?
1	Classic	6	10	Any usage. This is the default Template used for upgrades from 8700 and all installations prior to 9700 3.10. Additionally, this template is often used as the Alpha Entry Screen.	No
2	Speed Pad	10	10	Ideal for quick service environments or other environments where the entire view of the check detail/check summary areas is not needed. In most environments, this screen is not used as a payment screen.	No
3	Large Detail Left	10	5	Ideal for use as the Payment Screen or Function Screen, especially in environments that use the Speed Pad as the primary ordering template.	No
4	Sidebar Left	24	14	Ideal for any environment or screen type.	No
5	Sidebar Right	24	14	Ideal for any environment or screen type.	No
6	MMH	11	7	Used for most screens on Mobile MICROS devices.	Yes
7	MMH Review	3	4	Typically used for a Mobile MICROS navigational screens. In most MMH environments, it is not necessary for the operator to see the check detail throughout the transaction. Instead, users often program the screens so that the MMH Review screen is accessible from any other screen, and it shows the detail area.	Yes
8	MMH Classic	5	8	An alternate usage for Mobile MICROS devices. This is the same template that was available for 9700 installations.	Yes

Default Sign In Touchscreen

The Default Sign In Screen is the touchscreen that appears on a workstation when no one is logged on. When this touchscreen is active, BOB says Sign in, enter your ID number. The Default Sign In Screen is configured in the EMC's Touchscreen Assignment module. The Default Transaction Touchscreen in the EMC's Workstation module is not the Default Sign In Screen. For more, see Default Transaction Touchscreen.

Default Transaction Touchscreen

A Default Touchscreen is the initial touchscreen that appears when an employee signs in to a workstation. There are different ways to determine which touchscreen will appear when an employee signs in. A Default Touchscreen Hierarchy exists to prioritize which touchscreens take precedence.

Default Touchscreen Hierarchy

The Default Touchscreen Hierarchy determines which touchscreen employees sees when they sign into a workstation. If priority #1 does not apply, the system looks at priority #2. If #2 does not apply, the system looks to priority #3, and so on. The term "does not apply" means that the touchscreen value is set to 0. For example, if a workstation operator has a default touchscreen of 0, the system tries to look at Employee Class. If there is no Default Touchscreen assigned in any of the six priorities, the workstation results with an error.

Table 14-3 Default Touchscreen Hierarchy

Priority	Default Touchscreen	EMC Module Where Programmed
1	Training Mode ¹	Touchscreen Assignment
2	Operator	Employee Maintenance, Operators
3	Employee Class	Employee Class
4	Workstation	Workstations
5	Serving Period	Serving Periods
6	Revenue Center	Touchscreen Assignment

Usage and Recommendations for Programming

This section discusses configuration possibilities of programming default touchscreens, give situations where screens can be programmed in a certain manner, and show advantages and disadvantages to programming using different priorities.

Training Mode

If an employee is in training mode and the Default Training Screen is defined in Touchscreen Assignment for the revenue center, the employee always sees the Default Training Screen. (This screen can have a **Label Only** button that something like **YOU ARE IN TRAINING MODE** so the employee realizes that the sales they ring are not valid sales.)

- **Advantages:** Allows employees to know that they are in training mode.
- **Disadvantages:** An extra touchscreen exists in the database.

Operator

In general, people do not program databases with Operators dictating the default screens, but rather as an override to other touchscreen priorities. More information about Operator Overrides in the Employee Class section.

- **Advantages:** When looking at a database that has all operators with a default touchscreen, you can easily determine what screen the user sees once signed

¹ The Training Mode Default Touchscreen only applies when the employee is in training mode and a Default Training Screen is defined in Touchscreen Assignment for the revenue center.

in, because nothing overrides the Operator. (Technically, Training Mode overrides Operators, but employees are not usually programmed as in training mode.)

- **Disadvantages:** It takes effort to edit the Operator module to change a touchscreen for every operator. Instead of making just one change somewhere else (Employee Class or Serving Periods), you have to change possibly hundreds of employees.

Employee Class

Programming touchscreens by Employee Class generally makes the most sense in regard to database organization—if an employee is a server, the employee always sees the server touchscreen. Managers see manager screens and bartenders see bartender screens. Typically, programmers who use Employee Class have programmed all their revenue centers similarly or as identically as possible. If an employee in an Employee Class requires a different touchscreen, an operator touchscreen can be assigned to that employee as an override.

- **Advantages:**
 - You can change the default touchscreen for many employees simultaneously by changing the Employee Class default screen.
 - Easier maintenance for the site as Employee Class and Operator File are the only two hierarchies involved.
 - Programming default screens by Employee Class is ideal in most types of properties.
- **Disadvantages:** The programmer has to program each revenue center similarly (this is usually done anyway). For example, if screen #41 is the default server screen, and screen #41 does not exist in one revenue center, a server in that revenue center receives an error because the touchscreen number is invalid.

Workstation

This method is often used at sites where all employees perform the same functions, such as a stadium or food court, and where most of the employees are the same type of workstation operator (in this case, fast-transaction cashiers).

For example, a convention center or stadium (that has concessions only) has every employee defined in a Fast Transaction Cashier class, but each revenue center has a different menu and different touchscreens. This is an ideal situation to use Workstations for the default touchscreen. In this example, because the site has essentially programmed each workstation to match with a particular menu, the site can program each workstation with a default touchscreen; therefore, each menu is associated with each default touchscreen.

- **Advantages:** Ideal for the situation mentioned above. If the touchscreen needs to be overridden, for example, for managers, the Manager Employee Class can have a default touchscreen assigned so managers see their own screen.
- **Disadvantages:** It does not work well in every type of property, but it is perfect for the situation described above.

Serving Period

Programming default touchscreens by Serving Periods was previously a popular option but is used less and less frequently due to the maintenance that it requires, and the lack of flexibility. This method is often used for three-meal restaurants, where breakfast, lunch, and dinner menus are drastically different, and the programmer wants to guide the server to a different screen depending on the time of day.

The problem with this method is that not every employee is a server, and there are other easier ways to change breakfast, lunch, and dinner item selections.

- **Advantages:** When a server works in breakfast, their default screen has a Begin Table function key that takes them to a breakfast SLU selection. At lunch, the Begin Table function key takes them to the lunch SLUs, and so on.
- **Disadvantages:**
 - Programming the screens: Often these databases have three Begin Table screens that are completely identical, the only difference being the next screen that is attached to Begin Table. This means that you must make one change to the default transaction touchscreen three times.
 - Serving Period Changes: If serving periods are not configured to change automatically, the default screen does not immediately change to lunch when the lunch serving period begins. Additionally, most hotels allow customers to order food from any menu at any time. So if a customer wants an omelet at dinner time, the server has to change the serving period to breakfast to add omelets to the check, and that sale posts to the breakfast revenue.
 - Overrides: There are too many different ways to override serving periods, so it is difficult to determine where a user is getting their default touchscreen. For example, if overriding the serving period screen using Operators (for managers), each manager has to have an operator file, which is cumbersome. If overriding using Employee Class (for managers), it is odd to the customer why only one Employee Class has a default screen and the other classes do not. What about bartenders? They have different screens as well.

Revenue Center

Almost no one uses the Default Transaction Screen field in Touchscreen Assignment to dictate their default touchscreens. More often, this field is used as a catch-all in case of error. For example, if an employee does not have 1 through 5 priorities assigned, instead of receiving an error from the workstation, programmers can direct users to the Default Transaction Screen that says **No default screen found. Ask your manager to reprogram.**

Touchscreen Function Keys

A touchscreen function key, sometimes called a button or a key, is an element that appears on a touchscreen, allowing user interaction. Unlike other parts of a touchscreen, the touchscreen key area is completely user-defined. You can configure touchscreen keys to perform a number of different tasks. These tasks are broken into groups called Key Types.

Touchscreen Key Types

The following table lists the key types that are available, the choices in EMC once the key type is selected for a key, and the behavior at the workstation when the key type is used.

Table 14-4 Touchscreen Key Types

Key Type	EMC...	The Workstation...
1 – Menu Item	Shows a list of Menu Item Masters that contain at least one Menu Item Definition in the current revenue center. It is not possible to assign a specific menu item definition to a touchscreen key. Instead, the workstation determines the definition to use when the key is used.	Adds the menu item assigned to the key. The workstation determines the definition at the time the item is ordered based on the active Menu Levels. If no definitions are active, the error Menu Item Not Found appears.
3 – Discount	Shows a list of discounts in the current property.	Applies the discount assigned to the key.
5 – Service Charge	Shows a list of service charges in the current property.	Applies the service charge assigned to the key.
7 – Tender Media	Shows a list of tender/media records in the current property.	Applies the tender/media assigned to the key.
9 – Key Pad	Shows a list of keypad entries, including 0-9, 00, the decimal key, Enter, Clear, Backspace, and others.	Performs the selected keypad function.
11 – Function	Shows the function key list.	Performs the selected function.
12 – Macro	Shows a list of macro records in the current revenue center.	Performs the keystrokes defined in the macro.
13 – Menu Item SLU	Shows a list of menu item SLUs from the current revenue center. There are always 127 menu item SLUs for a revenue center; only the names of the SLUs differ between the revenue centers.	Shows all menu items associated with the selected SLU key.
14 – Discount SLU	Shows a list of discount SLUs from the current property. There are always 64 discount SLUs for a property; only the names of the SLUs differ between the properties.	Shows all discounts associated with the selected SLU key.
15 – Service Charge SLU	Shows a list of service charge SLUs from the current property. There are always 64 service charge SLUs for a property; only the names of the SLUs differ between the properties.	Shows all service charges associated with the selected SLU key.
16 – Tender/Media SLU	Shows a list of tender/media SLUs from the current property. There are always 64 tender/media SLUs for a property; only the names of the SLUs differ between the properties.	Shows all tender/media records associated with the selected SLU key.
17 – Alphanumeric	Dims the Key Number textbox, and activates the Alpha textbox where you can enter any single character to use for prompts or confirmation dialogs.	Enters the text assigned to the key. This key is generally used on the Alpha Entry Screen.

Key Type	EMC...	The Workstation...
18 – Course SLU	Shows a list of menu item course SLUs from the current revenue center. There are always 32 menu item course SLUs for a revenue center; only the names of the SLUs differ between the revenue centers.	Shows all menu items that belong to the selected course.
20 – Smart Key	Shows a list of Smart Keys programmed in the current revenue center.	Performs the function of the Smart Key. A Smart Key is itself a touchscreen key; it performs different functions based on different criteria.
21 – 28 SIM Inquiry (1 through 8)	<p>Activates the Key Number textbox active, allowing you to enter a value between 1 through 999,999. These keys allow you to set a SIM event inquiry. If you programs a touchscreen key as a Function/SIM, only 20 inquiries are available for each SIM; key types 21 through 28 expand the number of key types available.</p> <p>If you configure this field for SIM 1 Inquiry and then enter 1 as the Key Number, it is essentially the same as using function key #920. Ideally, you should use this function key only when the SIM Inquiry is greater than 20.</p>	Performs the selected SIM Inquiry.
31 - Autosequences	A list of workstation Autosequences Configured for the current property.	Runs the selected autosequence.

Touchscreen Navigation Function Keys

Function keys that are used for navigating touchscreens are not associated with Employee Role permissions or other user restrictions. The purpose of these keys is to allow workstation operators to navigate from one screen to the next.

While these function keys do not require Employee Role privileges, it is possible to restrict access to a touchscreen by using the lockout macro technique.

The following table describes the use of each navigation function key.

Table 14-5 Touchscreen Navigation Function Keys

Function Key Name	Description
350 - TS No Key Display	This function key is designed to be a blank space on the workstation touchscreen.
351 - TS SLU Page Up	The SLU shows the previous page of SLU items.
352 - TS SLU Page Down	The SLU shows the next page of SLU items.
353 - TS SLU Home	The SLU returns to the first page of SLU items.
354 - TS SLU End	The SLU shows the last page of SLU items.
355 - TS Shift	Used to move to the next screen when a Next Screen key is not valid. For example, by placing this key on the sign-in screen, operators can shift to another screen (this can be used because the TS Next key is invalid on the Sign-In screen).
356 - TS Popup	Shows the touchscreen configured as the Next Screen for this function key as a pop-up touchscreen. A popup touchscreen closes itself after a function is performed from the screen. Note that Popup touchscreens are generally programmed with a Close Popup function key.
357 - TS Close Popup	Closes the TS pop-up touchscreen. This function key is used on screens accessed using the TS Popup or TS StayDown function keys.
358 - TS Contrast Up	Changes the touchscreen contrast.
359 - TS Contrast Down	Changes the touchscreen contrast.
360 - TS Next Screen	Shows the touchscreen configured as the Next Screen for this function key.
361 - TS Previous Screen	Shows the previous touchscreen that was on screen.
362 - TS Stay Down Screen	Shows the touchscreen configured as the Next Screen for this function key as a pop-up touchscreen. Different from a pop-up touchscreen, a StayDown screen does not close itself after a function is performed. Note that StayDown touchscreens are generally programmed with a Close Popup function key.
363 - TS Label Only	Shows the label on the touchscreen.

Guest Check Pickup Function Keys

Picking up a guest check means that an operator has logged on to a workstation and is going to access a guest check that is already service totaled. Operators service total checks when a service round is complete; and then pick up a guest check when they wants to perform more operations on the check.

Simphony First Edition provides several function keys for picking up guest checks. To use any of the function keys listed below, they must be programmed on the operator's Default Transaction Screen.

Table 14-6 Guest Check Pickup Function Keys

Function Key Name	Description
402 - Pickup by Number	Used to pick up a check in the current revenue center, using the check number.
403 - Pickup Check#, RVC?	Used to pick up a check using the check number, from one of the eight revenue centers assigned to the workstation.
404-411 - Pickup, Check#, RVC 1-8	Used to pick up a check using the check number, from one of the specific revenue centers assigned for the workstation, as programmed in EMC. For example, if the 405 - Pickup, Check#, RVC 2 function key is used, the workstation picks up the check from the RVC #2 specified for the workstation.
412 - Pickup by Table	Used to pick up a check in the current revenue center, using the table number or table ID.
413 - Pickup, Table#, RVC?	Used to pick up 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 pick up a check using the table number, from one of the specific revenue centers assigned for the workstation, as programmed in EMC. For example, if the 415 - Pickup, Table#, RVC 2 function key is used, the workstation picks up the check using a table number from the RVC #2 specified for the workstation.
436 - Pickup Check by ID	Used to pick up a check by ID.
439 - Pickup Check SLU	Used to pick up a check by selecting the appropriate check from a list of all the accessible open checks on the touchscreen SLU. This is the most popular form of picking up checks.

Adding Function Keys to Touchscreens

1. To configure touchscreens for workstations, select the revenue center, and then click **Touchscreen Design** under the Workstations heading.
2. To configure touchscreens for Mobile MICROS devices, select the revenue center, and then click **Touchscreen Design** under the Mobile MICROS heading.
3. Add a new record, enter a name (for example, Transaction page), and then double-click the record to open it.
4. On the Touchscreen tab, configure the appropriate settings:

Table 14-7 Touchscreen Settings

Field	Description
Name	Enter a name that describes the touchscreen. Up to 16 characters are allowed.
Template	Select a template to use for the touchscreen. The touchscreen template determines the number of rows and columns that appear in the designer grid, and the location of the touchscreen areas and buttons for the screen.
Background File	Enter the name of a background file, if any, to show under the touchscreen keys for the button area of the touchscreen. You must manually place this file in the workstation's Bitmaps directory or push it to the workstation through the Client Application Loader (CAL). Background supports BMP format.

Field	Description
Media File	<p>Enter the name of a media file, if any, to play or show when this touchscreen becomes active.</p> <p>You must manually place this file in the workstation's Media directory (trainingmedia directory in case of training mode) or push it to the workstation through CAL.</p> <p>This field is translatable, allowing you to play different media files based on the logged-in user's language. Media files support WMV and WAV format.</p>
Idle Media File	<p>Enter the name of the idle media file, if any, to play or show when this touchscreen is active and the Idle Time is reached. You must manually place this file in the workstation's Media directory (trainingmedia directory in case of training mode) or push it to the workstation through CAL.</p> <p>This field is translatable, allowing you to play different media files based on the logged-in user's language. Idle Media files support WMV and WAV format.</p>
Idle Time	<p>Enter the time, in seconds, to wait before showing the Idle Media File.</p>
Animation Image	<p>Enter the name of an animation image, if any, to show when this touchscreen becomes active.</p> <p>Animation Images appear on the touchscreen template's animation area, if it exists. This field allows you to show a series of images for a preset number of seconds. For example, a property wants to show five images that illustrate the steps for properly folding napkins. The programmer enters the value napkin.bmp for this field, and then loads the files napkin1.bmp, napkin2.bmp, napkin3.bmp, napkin4.bmp and napkin5.bmp onto the client. The workstation shows each image in succession for the number of seconds configured in the Animation Image Speed field.</p> <p>You must manually place the files in the workstation's Media directory or push them to the workstation through CAL.</p> <p>This field is translatable, allowing you to show different media files based on the logged-in user's language.</p>
Animation Image Speed	<p>Enter the number of seconds each animation image stays on screen until the next animation image appears. If only one animation file is present, the image appears until a touchscreen key is pressed.</p>
Fixed Prompt Text	<p>If available, enter the text to show on the workstation's Fixed Prompt Text area. You can enter any value and it can include instructions such as Tell our customers about happy hour pricing or any message to aid operators.</p> <p>This field is translatable, allowing you to show different text based on the logged-in user's language.</p>

5. Right-click the page area in which to define the function key, select **Insert Key**, and then select the appropriate insert option.
6. Configure the following settings on the Key tab:

Table 14-8 Touchscreen Design Key Settings

Field	Description
Legend	Enter a name for the function key that describes its function. Up to 16 alphanumeric characters are allowed. The name appear inside the key on the touchscreen. If left blank, the system automatically generates the name after a Key Number is selected.
Legend Size	Select the print size of the legend that appears for the function key.
Key Type	Select a Key Type category to assign to the function key.
Key Number	Click the right arrow button adjacent to the field to open the Key Function Select dialog box, and then assign the function of this key. If you select any SIM Inquiry Key Type, a field becomes active for entering a numeric SIM# value.
Alpha	If you selected Alphanumeric as the Key Type , enter the alphanumeric character to insert when this function key is pressed.
Preset MLvl	If you selected Menu Item as the Key Type , select the main menu level that becomes active for the duration of this keystroke or select 0-None to keep the levels the same. This field is set for preset Menu Item keys. For example, a Small Soda or a Large Soda—both of these items are Soda, but by using this field, you control the main level (and therefore, the size) of the item being ordered.
Preset SLvl	If you selected Menu Item as the Key Type , select the sub level that becomes active for the duration of this keystroke or select 0-None to keep the levels the same. This field is set for preset Menu Item keys. For example, a Small Soda or a Large Soda—both of these items are Soda, but by using this field, you control the main level (and therefore, the size) of the item being ordered.
Color	Select the color combination to use for the key or select 0-No Color Defined . When Workstation Themes are in use, the description of the color listed in EMC may not correspond to the colors that appear on the workstation.
(Optional) Icon	Select an icon for the function key.
Icon Location	If you assigned an icon, select the location of the icon on the function key.
Next Screen	Select the touchscreen that appears after the function key is pressed (or after the function assigned to the button is executed). If set to 0 -None , the operator remains on the current screen.
Media File	Enter the name of a media file, if any, to play or show when the button is pressed. You must manually place the media file in the workstation's Media directory or push it to the workstation through CAL. This field is translatable, allowing you to play different media files based on the logged-in user's language.

Field	Description
Full Screen Media	Select to play media files (if any) on the entire screen. Deselect to play media files within the bounds of the button.
Bitmap	Select a Bitmap to show on the function key. The drop-down list shows all images that are saved in the Touchscreen Bitmaps EMC module.
Transparent Bitmap	Select to draw the touchscreen bitmap so that the background color of the function key shows through. Deselect to draw the function key normally. The purpose of this option is to let touchscreen bitmaps appear as though they are part of the button, instead of being displayed as an image on a function key.
Stretch to Fit	Select to stretch the bitmap image to fit the function key. Deselect to show the image in the center of the function key.

7. Repeat Steps 4 to 5 to add more function keys.
8. To delete function keys, select one or more function keys, right-click, and then select **Remove Key(s)**.
You can select multiple function keys by holding the Ctrl key while selecting the function keys.
9. To copy function keys, select one or more function keys, and then press Ctrl+C or right-click and select **Copy**.
10. To paste the copied function keys, press Ctrl+V or right-click on an empty cell and then select **Paste**.
If you use Ctrl+V, the keys paste onto the same rows and columns as the location of the copied keys. For example, if you copied the key in column 4, row 3, Ctrl+V pastes this key onto column 4, row 3 of the new touchscreen.
If you use the right-click context menu, it pastes in the cell where you right-clicked when only one key is copied. When multiple keys are copied, they paste in the order they were copied, and in relative position to the copied keys. For example, assume that keys were copied in order from top to bottom: Vodka, Whiskey, Tequila, and Scotch. When you right-click and select Paste, the keys paste in top-to-bottom order: Vodka, Whiskey, Tequila, and Scotch.
11. To view the Context Sensitive Help (CSH) for a key, select the function key, right-click, and then select **Show Help**. Help is only available for Function or Key Pad Type keys. Help is also available from the Function Key Selection dialog.
12. To select all the function keys programmed on the touchscreen, press Ctrl+A. This key combination is useful when you want to copy or remove all the keys.
13. Click **Save**.

Configuring Touchscreen Styles

A Touchscreen Style determines how function keys appear when a SLU key is pressed. Touchscreens are generally programmed using SLU functionality; because of Touchscreen Styles, SLUs are easier to maintain than placing touchscreen function keys directly on a screen. Touchscreen Styles control behavior such as the ability for items to appear:

- Alphabetically
- Using sort priorities
- Left-to-right or top-to-bottom.

1. To configure the touchscreen style for workstations, select the revenue center, and then click **Touchscreen Styles** under the Workstations heading.

2. To configure the touchscreen style for Mobile MICROS devices, select the revenue center, and then click **Touchscreen Styles** under the Mobile MICROS heading.
3. Add a new record, and then double-click the record to open it.
4. Configure the following settings:

Table 14-9 Touchscreen Styles Settings

Field	Description
Name	Enter a name for this Touchscreen Style. Up to 16 characters are allowed.
Color Combination	Select the color of the touchscreen keys for this Touchscreen Style. This color combination can differ from the actual colors that are shown on the workstation if Workstation Themes are in use.
Function Key TS	Select the touchscreen to use for showing the SLU items in this style. Typically, a touchscreen is programmed with SLU keys grouped together, with a large empty space on screen. When a SLU is used, the empty space gets filled with the appropriate SLU items.
Icon Placement	If an icon is assigned to a key that shows on this SLU, select the location of the icon as it should appear on the touchscreen function key. If this value is set to 0-None , icons do not appear.
Key Height	Enter the height of the function keys that appear in this Touchscreen Style. For workstations, enter a value between 1 through 6 for regular workstations. For Mobile MICROS devices, enter a value between 1 through 5.
Key Width	Enter the width of the function keys that appear in this Touchscreen Style. For workstations, enter a value between 1 through 10 for regular workstations. For Mobile MICROS devices, enter a value between 1 through 8.
Font Size	Enter the size of the font (1 through 3) to use for the Touchscreen Style.

5. Select the appropriate options, and then click **Save**.

Table 14-10 Touchscreen Styles Options

Option	Description
1 - Sort Screen Alphabetically	Select to show item function keys in alphabetical order, by the descriptor entered in the Name field. Deselect to sort items by record number.

Option	Description
2 - Stay Down SLU Screen	Select to cause the touchscreen generated by this style to remain on screen after one of the items from the SLU is pressed. Deselect to cause the workstation to return to its previous screen after an item from the SLU is selected.
3 - Show Table/Group in Open Check SLU	Select to show the table and group number when a Guest Check SLU is generated by this style. Deselect to suppress the table and group number.
4 - Show Check # in Open Check SLU	Select to show the check number when a Guest Check SLU is generated by this style. Deselect to suppress the check number.
5 - Show Other Employee's Name in Open Check SLU	Select to show the check name of the other workstation operator to whom the check belongs, along with the check number, when a Check SLU is generated by this style. This option is usually enabled and it only applies when privileged operators such as managers (who are able to see other operators' checks) access the Pickup Check SLU.
6 - Show Open Time in Open Check SLU	Select to show the time the check was opened along with the check number, when a Check SLU is generated by this style.
7 - Show Amount Due in Open Check SLU	Select to show the amount due, along with the check number, when a Check SLU is generated by this style.
8 - Display Keys Vertically Starting at Top Left	Select to show SLU items in an up-and-down fashion. When selected, the first SLU item appears in the upper-left corner, and the next item below it, and so on. When there is no more room to place keys below, a new column is started to the right of the upper-left key. Deselect to use option 9 - Display Keys Horizontally Starting at Top Left setting.
9 - Display Keys Horizontally Starting at Top Left	Select to show SLU items in a side-to-side fashion. When selected, the first SLU item appears in the upper-left corner, and the next item its right, and so on. When there is no more room to place keys to the right, a new row is started below the upper-left key. This option only applies if option 8 - Display Keys Vertically Starting at Top Left is deselected. If both this option and 8 - Display Keys Vertically Starting at Top Left are deselected, keys appear on the screen in rows, centered.
10 – Sort Checks W/ Held Items in Inverse in Open Check SLU	Select to show all guest checks with menu items on hold in inverse color.

Option	Description
11 - Sort Screen Using Menu Item Sort Priorities	<p>Select to show item function keys generated by this style in the order defined by the SLU Sort Priority of the Menu Item Definitions in the SLU.</p> <p>When selected, items sort by the SLU Sort Priority, then alphabetically or by record number within the Sort Priority, based on option 1 - Sort Screen Alphabetically. Sort Priority sorts all Priority 1 definitions, then Priority 2, then Priority 3, up to Priority 99. Priority 0 items appear last.</p>

Configuring Function Keys for Keyboard Workstations

Keyboard Workstations have a preset number of keys, so it cannot dynamically generate screens or function keys. Keyboard Workstations are not intended to be used in environments that require hundreds of menu items. Therefore, function key configuration for Keyboard Workstations is slightly different. You can configure Keyboard Keys with three purposes:

- **Unshifted Key function:** This is the primary function of the key.
- **Shifted Key function:** This is the function of the key that is performed while the Shift key is being held down.
- **Alpha function:** This is the alphanumeric value of the key that is used when the workstation is expecting alphanumeric input.

1. Select the revenue center, and then click **Keyboard Design**.
2. Insert a new record, enter a name, and then double-click the record to open it.
3. Right-click the page area in which to define the function key, select **Insert Key**, and then select the appropriate insert option.
4. Configure the following settings on the Key tab:

Table 14-11 Keyboard Design Key Settings

Field	Description
Unshifted Key Type	Select a Key Type category to assign to the key. The list of categories is the same as the Key Type list for Touchscreen Keys, except the SLU categories are not available. See Touchscreen Key Types for more information.
Unshifted Key Number	Click the right arrow button to open the Key Function Select dialog, and assign a function for the key. If you select any SIM Inquiry Key Type, a field becomes active for entering a numeric SIM# value.
Shifted Key Type	Select the Key Type category to assign to this key. These are the same options available in Unshifted Keys , with the exception being that Shifted Keyboard Keys do not allow any of the SIM Inquiry key types.
Shifted Key Number	Click the right arrow button to open the Key Function Select dialog box.
Alpha	Enter the alphanumeric character to enter when this keyboard key is pressed.

Field	Description
Preset MLvl	If you selected Menu Item as the Key Type , select the main menu level that becomes active for the duration of this keystroke or select 0-None to keep the levels the same. This field is set for preset Menu Item keys. For example, a Small Soda or a Large Soda—both of these items are Soda, but by using this field, you control the main level (and therefore, the size) of the item being ordered.
Preset SLvl	If you selected Menu Item as the Key Type , select the sub level that becomes active for the duration of this keystroke or select 0-None to keep the levels the same. This field is set for preset Menu Item keys. For example, a Small Soda or a Large Soda—both of these items are Soda, but by using this field, you control the main level (and therefore, the size) of the item being ordered.

5. Repeat Steps 3 to 4 to add more keys.
6. Click **Save**.

Screen Look Up (SLU)

Screen Look Up, or SLU refers to a button programmed on a touchscreen. When an SLU key is pressed, the workstation looks up a list of items that correspond to the key, and shows them on the screen. For example, when an SLU button is pressed (Appetizers, for instance), the workstation shows all menu items belonging to that SLU group. Typically, menu item buttons are not added directly to touchscreens, but instead menu items are linked to an SLU group. By using SLUs you can control certain settings such as auto alphabetizing, color, and sorting.

Each revenue center has a fixed number of SLUs per SLU type. The following table lists the SLU types and the number of SLUs allowed.

Table 14-12 SLU Types

SLU Type	No. of SLUs
Menu items	127
Condiments	64
Discounts	64
Service Charges	64
Tender/media	64
Menu item courses	32

Configuring Screen Look Ups for Menu Items

1. Select the revenue center, and then click **RVC Descriptors**.
2. Click the **Group Names** tab, and then enter names for menu item screen look up groups in the Menu Item SLU Names table.
3. Click **Save**.
4. Select the Enterprise, property, revenue center, or zone, and then click **Menu Item Maintenance**.
5. Double-click a menu item, and then click **General** tab.
6. Select the relevant **SLU** group from the Touchscreen Properties section.

7. (Optional) Enter a **SLU Sort Priority** for the menu item.
8. Repeat Steps 4 through 7 for all menu items to appear on screen look ups.
9. Click **Save**.
10. Add Menu Item SLU function keys to the touchscreen. See [Adding Function Keys to Touchscreens](#) for instructions.

Configuring Screen Look Ups for Discounts

1. Select the property, and then click **Property Parameters**.
2. Click the **Screen Look Up** tab.
3. Enter names for discount screen look up groups in the Discounts table.
4. Click **Save**.
5. Select the property, and then click **Discounts**.
6. Double-click a record, and then click the **NLU/SLU** tab.
7. Select the relevant SLU group for the discount, and then click **Save**.
8. Repeat Steps 6 to 7 for all discounts to appear in screen look ups.
9. Add Discount SLY function keys to the touchscreen. See [Adding Function Keys to Touchscreens](#) for instructions.

Configuring Screen Look Ups for Service Charges

1. Select the property, and then click **Property Parameters**.
2. Click the **Screen Look Up** tab.
3. Enter names for service charge screen look up groups in the Service Charge table.
4. Click **Save**.
5. Select the property, and then click **Service Charges**.
6. Double-click a record, and then click the **NLU/SLU** tab.
7. Select the relevant **SLU** group for the service charge, and then click **Save**.
8. Repeat Steps 6 to 7 for all service charges to appear in screen look ups.
9. Add Service Charge SLU function keys to the touchscreen. See [Adding Function Keys to Touchscreens](#) for instructions.

Configuring Screen Look Ups for Tender/Media Records

1. Select the property, and then click **Property Parameters**.
2. Click the **Screen Look Up** tab.
3. Enter names for tender/media screen look up groups in the Tenders table.
4. Click **Save**.
5. Select the property, and then click **Tender/Media**.
6. Double-click a record.
7. From the **General** tab, select the relevant **SLU** group for the tender record, and then click **Save**.
8. Repeat Steps 6 to 7 for all tender/media records to appear in screen look ups.
9. Add Tender Media SLU function to the touchscreen. See [Adding Function Keys to Touchscreens](#) for instructions.

Assigning a Touchscreen Style to SLUs

The Touchscreen Design dictates whether the SLU appears on the same touchscreen from which it was called or whether it appears on a different touchscreen. For instructions on how to create touchscreen styles, see [Configuring Touchscreen Styles](#).

1. Select the revenue center, and then click **SLU Assignment**.
2. From the Select SLU pane, select the SLU type.
3. From the Style column in the table, select the touchscreen style corresponding to the appropriate SLU names.
4. Click **Save**.

15 License Configuration

With the release of Simphony First Edition version 1.7, you only have to configure the number of licenses that you have purchased for the following clients in the Licensing tab:

- Workstation clients
- Kitchen Display System (KDS) clients
- Transaction Services clients

Benefits of the License Configuration Changes and the New Licensing Tab

- You no longer have to enter license keys in the EMC to activate features, and to add workstations, KDS, and Transaction Service Clients to Simphony First Edition.
- You no longer need to use the GetCode.exe utility nor the Licensing Keyless activator to obtain license keys for each new purchase.
- You can append new purchases to the existing license counts.
- The licenses you purchase do not expire.
- You can compare the number of licenses purchased with the number of clients configured side by side.
- You can see an overview of property, revenue center, workstation, KDS, and Transaction Services client configurations from the Enterprise Parameters module.

Configuring the Licensing Count

1. Select the enterprise, and then select **Enterprise Parameters**.
2. Click the **Licensing** tab.
3. Click **Configure** adjacent to **Workstations Client License Count**.
4. To add a new license count, select **Set new license count**.
5. To append licenses to an existing license count, select **Add to the existing license count**.
6. Enter the number of client licenses you purchased.
7. (Optional) Enter additional details regarding the purchased license in **Reference**, and **then** click **OK**.
8. Repeat Steps 3 through 7 for **Transaction Service Client License Count** and **KDS Client License Count**, and then click **Save**.
9. Click **Yes** when prompted for confirmation.

Viewing Enterprise Information

1. Select the enterprise, and then select **Enterprise Parameters**.
2. Click the **Licensing** tab.
3. Click **View** adjacent to the **Properties**, **Revenue Centers**, **Workstations Client License Count**, **Transaction Services Clients**, or the **Kitchen Display System Clients** label to see additional information.

16 Privacy and Personal Data Management

Personal Information Notice and Consent for Employees and Guests

Prior to entering and storing the personal information of an employee or guest in the system, consent must first be obtained. Consent can be denied, which stops you from entering a new employee record and causes guest personal information to be ignored by the system. You can enable or disable the prompt of the consent message. The prompt of the consent message appears for only those properties who opt-in.

The consent notification message for an employee appears in the EMC at the Enterprise, Property, or Revenue Center level when creating a new employee. If consent is granted, their personal information is entered in the Employee Maintenance module and stored in the application database.

The consent notification message for a guest appears during transactions carried out on workstation clients. If consent is granted by a guest, their personal information (such as first and last name, phone number, etc.) is entered at the workstation and stored in the system's transaction database.

The Audit Trail tracks and logs the user name of whomever is currently logged in (either in the EMC or workstation), and responds to the consent request for either employees or guests respectively. See the [Audit Trail](#) chapter for more information.

Configuring Consent Messages

1. Select **Enterprise Parameters** or **Property Parameters**, and then click the **Data Privacy** tab.
2. Within the **Data Privacy** tab:
 - a. Select **Enable Consent to Store Personal Data**.
 - b. Enter your consent message for employees and guests in the **Message for Employees Consent** and **Message for Guests Consent** text boxes. You can also paste the text into the text boxes. The maximum character limit for Employee/Guest messages is 1,024.
3. To disable the consent prompt, deselect the **Enable Consent to Store Personal Data** checkbox.
4. Click **Save**.
5. To edit either consent message, repeat **Step 2, sub-step b**, and then **Save**.

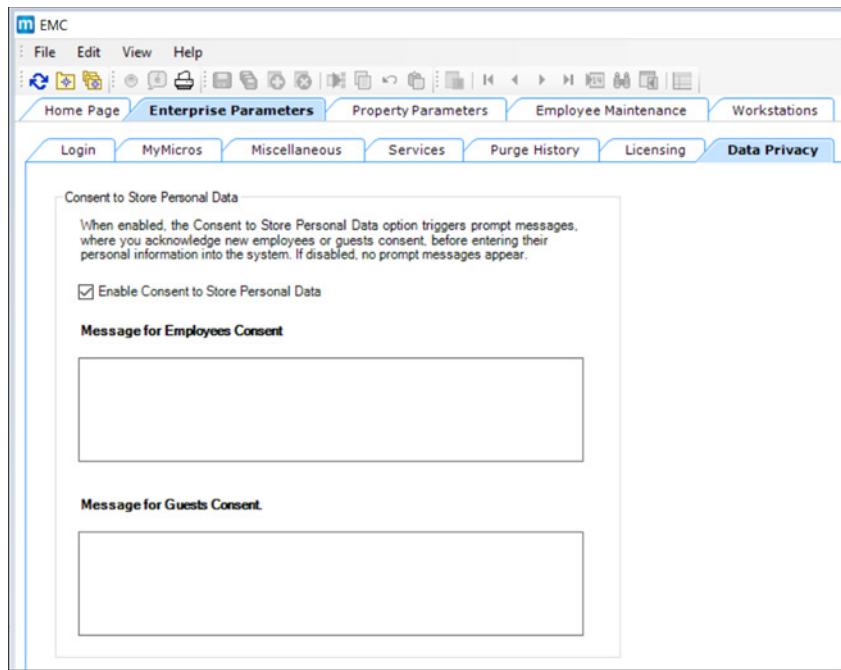


Figure 16-1 Data Privacy Tab

17 Audit Trail

Understanding the Audit Trail

You can use the Audit Trail module to view changes made to the Symphony First Edition application. The Audit Trail records and reports all additions, changes, and deletions made through the EMC and through PMC Procedures. Additionally, the Audit Trail reports on successful and failed logins to EMC, PMC Report takers, Key Manager Activity, Audit Trail purges, credit card module activities, and activities from the DbProcs utility.

Oddities and Exceptions

- Trailing white space changes are difficult to determine as they would appear to be the same. Therefore, the New Value column in the Audit Trail results grid shows changes of this type by showing the new value followed by the value in quotes to show where the extra space characters exist. For example, if "Hot Dog" was changed to "Hot Dog "(space at the end), it appears as, Hot Dog ("Hot Dog ").
- The Old Value and New Value columns can hold only 2000 characters. If a value exceeds this length, only the first 1980 characters show. You must expand the row height to view the complete text.
- Changes made in the Property Merchant Groups module are treated as a single-record module (similar to RVC Parameters or Property Descriptors); all records for this module are logged without an Object Number.
- Other than the name, changes in the Selection Hierarchies module are not logged to Audit Trail.
- When a Descriptor is modified to use a logo, in Audit Trail this is represented using the special syntax ^[pl3] where 3 represents the object number of the Print Logo.
- When a macro record is created, its 16 steps are not created. The first time a macro record is saved after its creation, Audit Trail displays each step being added.
- The configurable data for printers, credit card drivers and credit card merchant groups are displayed in EMC using standard controls that are found throughout EMC. However, these data are actually stored in the database in a single data column as an XML string (or a text string, for Printers). Therefore, changes in these modules show the Field as Configuration, and the Old/New values show the entire string value.
- When an Audit Trail report is taken, this activity is logged to Audit Trail. All Audit Trail Reports taken are logged as an Enterprise-level activity.

Internationalization

Text is stored in the AUDIT_TRAIL database table so that you view the text in your own language. For example, if a user from England changes Menu Item Class option bit #1 from ON to OFF, the data is stored in the table so that an Audit Trail report shows the name of the option bit in Japanese for an EMC user from Japan. The Audit Trail report translates the text key that is stored in the database at the time the Audit Trail report is generated, using the logged-in user's EmcText file.

The following table summarizes the methods for Audit Trail internationalization:

Table 17-1 Audit Trail Internationalization

Audit Trail Columns	Description	Translatable?
Employee Application Module Operation	These fields are all stored as numbers in the database. When generating the report, the number is converted into the appropriate text.	Yes
Field	Shows the name of the field or option that was changed.	Yes
Sub Record Name	Shows the name of the sub record. See Sub Record Formatting for more information.	Yes
Sub Record Field	Shows the name of the field for the sub record. For example, a touchscreen function key legend or a KDS bump bar scan code value.	Yes
Old/New Value	Shows the old and new values of a changed record.	Sometimes. Often, these fields are not translatable. For example, if a user changes a Menu Item Definition's SLU or name, Audit Trail determines the old/new values appropriately; there is no need for translation. Sometimes this field is translated when the change is made. For example, if a Discount's Menu Level #1 is changed from ON to OFF, the text ON and OFF comes from the EmcText file of the EMC handler.
Comments	Provides more information about the audit trail record. The data in this field is typically not used by EMC end-users.	No

Sub Record Formatting

A sub record is any record that is added or removed from the primary records. For example, macro steps, touchscreen function keys, Menu Item Group detail rows, workstation devices. All sub record modifications are considered edits. For example, if a touchscreen function key is added to screen #10, this logs as an edit to screen #10.

The following table describes the information that shows in Audit Trail when a sub record is modified:

Table 17-2 Audit Trail of Sub Record Modifications

When a Sub Record is...	The Audit Trail Shows...
Added	<ul style="list-style-type: none">Field: Name and number of the sub record. For example, Key [30]. <p>For most records, the index included in the brackets for a sub record represents a useful number. For example, Key [30] refers to the 30th key added to the screen.</p> <p>Some records do not have useful indexing fields. For example, Menu Item Groups and CAL Package deployment rows do not have any type of object number that defines the order of the sub records. When these records log to audit trail, additions log as index [0]; deletions and edits are listed with the index of the database primary key for the sub record.</p> <ul style="list-style-type: none">Old Value: (added)New Value: A description of the sub record. For touchscreen keys this value shows as, for example, Function: 7-1, Legend: Cash. This denotes that a key that uses Tender #1 with the legend cash was added.
Edited	<ul style="list-style-type: none">Field: Name and number of the sub record, followed by the field that changed. For example, Key [30]: Legend.Old/New Value: The old and new values of the field.
Deleted	<ul style="list-style-type: none">Field: Name and number of the sub record. For example, Key [30].Old Value: A description of the sub record. For touchscreen keys this value shows as, for example, Function: 7-1, Legend: Cash. This denotes that a key that uses Tender #1 with the legend cash was removed.New Value: (removed)

Allowing Employees to Access the Audit Trail Module

1. Select the Enterprise level, and then click **Enterprise Roles**.
2. Double-click the enterprise role, and then click the **Actions** tab.
3. In the Enable column, select the check box adjacent to **Enterprise Audit Trail User**.
4. To allow employees associate with the role to manually remove old Audit Trail records from the database, select the check box adjacent to **Purge Audit Trail**.
5. Click **Save**.
6. Select the Enterprise level, and then click **Roles**.
7. Double-click the role type, and then click the **Actions** tab.
8. In the Enable column, select the check box adjacent to **Access Property Audit Trail**.
9. Click **Save**.

Using the Audit Trail

1. Select the Enterprise or property, and then click **Audit Trail**.
2. To perform a quick search on the Search tab:
 - a. Select the timeframe from the **All Changes In** drop-down list.
 - b. Click the **Run Quick Search** button.When you perform a quick search, the system ignores the values in the standard search fields.
3. To perform a standard search, enter or select information in the following fields, and then click the **Search** button.

Table 17-3 Audit Trail Standard Search Fields

Field	Description
Application	Select an application from the drop-down list. Depending on your selection, the Module drop-down list becomes active or dimmed. For example, when you select EMC, the Module drop-down list shows a list of all EMC modules.
Module	Select a module from the drop-down list. This field becomes active only when the Application selection allows a choice of modules. Depending on your selection, the Object Numbers field becomes active or dimmed. For example, when you select EMC from the Application drop-down list and Discounts from the Module drop-down list, the Object Numbers field becomes active.
Object Number	Enter an object number or a range to retrieve results based on specific records only. Leave this field blank, to have the system include all object numbers in the search criteria.
Operation	Select an operation from the drop-down list. This field becomes active based on the Application and Module selections.

Field	Description
Property	<p>Select a property from the drop-down list.</p> <p>This field becomes active only when Audit Trail is opened from the Enterprise level.</p>
Revenue Center	<p>Click Select, select a revenue center, and then click OK.</p> <p>This field becomes active only when a specific property is selected.</p>
Employee	<p>Click Select, select an employee, and then click OK.</p> <p>When you select a specific employee, only changes made by that employee are included in the list.</p> <p>Click Me to include only the logged-in employee.</p>
Date Range	<p>Select a predefined date range to query the Audit Trail, or select User-Defined to enable the start and end fields.</p> <p>The predefined date ranges are:</p> <ul style="list-style-type: none"> • Last Hour • Last Two Hours • Today • Last 24 Hours • Last 48 Hours • Last Week • Last Two Weeks
Start	<p>Select a start date and time. This field allows you to narrow a query to a specific date or date range.</p> <p>Select All Dates to include all dates in the query.</p>
End	<p>Select an end date and time. This field allows you to narrow a query to a specific date or date range.</p> <p>Select All Dates to include all dates in the query.</p>
Old/New Values	<p>Enter text to use in the query.</p> <p>This fields are useful in finding a specific change to a record, such as "When was the item Hamburger renamed to Cheeseburger?"</p>
Preserve Previous Results	<p>Select this option to merge the search results with the previous search results, instead of overwriting them.</p> <p>Deselect this to include only the results of the most recent search.</p> <p>Text comparisons often take longer than comparisons that do not search text. While a search using these text fields may return the specific Audit Record you want, a search for the module of the item returns results more quickly.</p>

4. If the number of results to be returned exceeds the pre-set thresholds for Audit Trail results (for example, 10,000 records or more), the application prompts you to confirm the action.
5. To view the search results, click the **Results** tab.
 - a. To save the results, click **Save to Disk**, select the directory, and then click **Save**.

The default file name is AuditTrailResults.txt and the default directory is My Documents.

- b. To copy the results into another application (such as Notepad or email) without storing the information, click **Formatted Results**, and then click **Copy**.
- 6. To manually remove old records from the Audit Trail table in the database, click the **Purge** tab.
The Purge tab is visible only at the Enterprise level, and you must have the Purge Audit Trail privilege.
- 7. Select the date before which to purge the records, and then click **Purge**. For example, if you select 9/1/2016, the application deletes all records from September 1, 2016 and earlier. Records are deleted based on the UTC date of the Audit Trail record.
In addition to this manually initiated purge, the Data Transfer Service (DTS) purges Audit Trail records automatically.

Understanding Audit This Record

In almost every module, you can audit an individual record or a group of similar records. The results usually show the record or records at a specific position. For example, a user:

- 1. Adds a Tender Media record at Object Number 1234.
- 2. Changes the record's name to Cash.
- 3. Deletes the record.
- 4. Adds a new record at Object Number 1234.
- 5. Changes the record's name to MasterCard.

After performing these steps, the Audit This Record results show all five of the changes (not just the changes for Steps 4 and 5). Although the first Tender Media record was deleted, it is considered "this record" for functional purposes. In short, all records at the same object number are treated as "this record" and are included in the results.

Using Audit This Record

- 1. Select the Enterprise or property, and then open a module that contains at least one record.
- 2. To view audit trail details for all records in the module:
- 3. In Table View, click the object number cell of any record.
- 4. On the EMC toolbar, click **Edit**, and then select **Audit This Record**.
- 5. Click **Yes** when prompted to show audit trail information for all activities in the module.
- 6. To view audit trail details for specific records, select one or more records, right-click, and then select **Audit This Record**.
- 7. Alternatively, you can click **Edit** on the EMC toolbar, and then select **Audit This Record**.
- 8. To run specific queries on the selected record or records, click **Show Advanced Options**.
- 9. The Advanced Search panel shows the same search parameters that are available in the Audit Trail module. See [Using the Audit Trail](#) for more information.

18 Reports

EMC Reports

Employee Permission Report

The Employee Permissions Report (previously the Nevada Gaming Board Report) shows employee configurations, employee roles, and employee classes within a specific property or for the enterprise.

The report contains the following sections:

- Report Content: Lists the information included in the report.

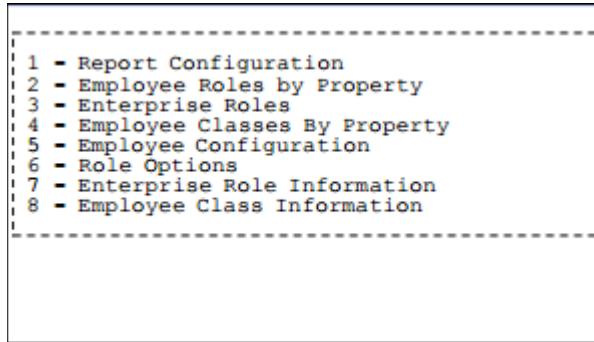


Figure 18-1 Sample Report Content in the Employee Permissions Report

- Report Configuration: Lists the properties included in the report.

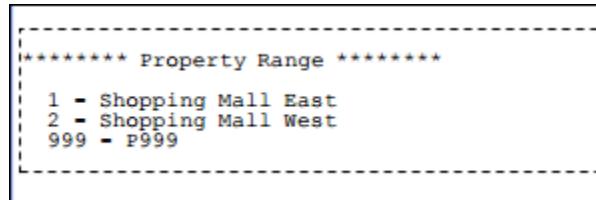


Figure 18-2 Sample Report Configuration Content in the Employee Permissions Report

- Employee Roles by Property: Lists each property and its associated employee roles.

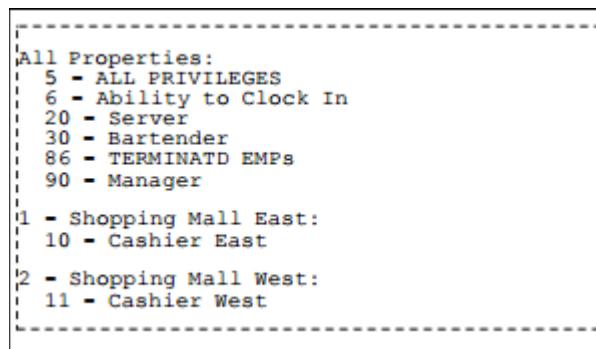


Figure 18-3 Sample Employee Roles by Property Content in the Employee Permissions Report

- Employee Roles: Lists all enterprise roles.

```

1 - ALL ENTERPRISE ACCESS
2 - Employee Access Only
3 - Enterprise-Level Audit Trail

```

Figure 18-4 Sample Employee Roles Content in the Employee Permissions Report

- Employee Classes by Property: Lists each property and its associated employee classes.

```

1 - Shopping Mall East:
10 - Cashier
20 - Server
30 - Bartender
50 - Accounting
60 - Room Service
80 - FstTrans Cashier
90 - Manager

2 - Shopping Mall West:
10 - Cashier
20 - Server
30 - Bartender
50 - Accounting
60 - Room Service
80 - FstTrans Cashier
90 - Manager

```

Figure 18-5 Sample Employee Classes by Property Content in the Employee Permissions Report

- Employee Configuration: 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				

Figure 18-6 Sample Employee Configuration Content in the Employee Permissions Report

- Role Options: 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.

<pre>** 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</pre>							
<pre>** 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 Discounts Service Charges Tender Media X X X X X X</pre>							

Figure 18-7 Sample Role Options Content in the Employee Permissions Report

- Enterprise Role Information: Shows the permission status for each option configured for each enterprise role.

<pre>View Edit Add Delete File GLOBAL ACCESS All Access ENTERPRISE Enterprise Parameters Properties Selection Hierarchies Languages Print Logos Touchscreen Bitmap PERSONNEL Employees Enterprise Roles Roles HARDWARE Service Hosts Services Interfaces Credit Card Driver Credit Card Merchant Groups CAL Packages AUTOSEQUENCE PC Autosequences PC Autosequence Schedules</pre>							
---	--	--	--	--	--	--	--

Figure 18-8 Sample Enterprise Role Information in the Employee Permissions Report

- Employee Class Information: 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.

```

PROPERTY: 1 - Shopping Mall East

10 - Cashier
OFF - ISL Employee Option #1
OFF - ISL Employee Option #2
OFF - ISL Employee Option #3
OFF - ISL Employee Option #4
OFF - ISL Employee Option #5
OFF - ISL Employee Option #6
OFF - ISL Employee Option #7
OFF - ISL Employee Option #8

Operator Options
1 - Restaurant
OFF - 1 - Table Number Entry Required to Begin/Pickup Checks
OFF - 2 - Number of Guests Entry Required for New Checks
OFF - 3 - Require Check Employee Number with New Checks
OFF - 4 - Use Employee Number to Open Check for Another Employee
ON - 5 - ON - On-Demand; OFF - By-Round
OFF - 6 - Special By-Round; "Temporary on Demand"
OFF - 7 - Cannot Perform Fast Transactions
OFF - 8 - Popup Operator
OFF - 9 - Line by Line Customer Receipt
ON - 10 - Display Menu Item NLU Number
OFF - 11 - NLU List is Stay Down
ON - 12 - Display Condiment Help
OFF - 13 - Bank Entry Required at Beginning of Shift
OFF - 14 - Require Seat Number Entry
ON - 15 - If Staydown Operator, Enable the Auto Popup Timeout
OFF - 16 - Require Guest Check ID
OFF - 17 - Mobile MICROS Popup Operator
ON - 18 - Display Menu Item NLU Number on MMH
OFF - 19 - DBCS Operator
OFF - 20 - Require Authorization for Cash Drawer Reconnection
OFF - 21 - Require Authorization for Power Cycle of UWS during Operations

```

Figure 18-9 Sample Employee Class Information in the Employee Permissions Report

Generating the Employee Permission Report

1. Open a Command Prompt window as an administrator.
2. Navigate to [Simphony\Installationpath]\etc\EmployeePermissionReport\
3. Enter the following command, and then press the Enter key:
 EmployeePermissionReport.exe –UN=[EMC Username] –UP=[password] -
 S=[Transaction Server Name] –O=[Output Path and File Name] –P=[Comma
 Separated List of Properties] –L=[Language Object ID]
4. Use Windows Explorer and navigate to the location you specified as the output
 path for the report in the command to view the report. Property Management
 Console (PMC) Reports

Employee Closed Check Report

The Employee Closed Check Report shows all checks that have been closed by an employee, including reopened checks that were closed again, and checks closed as memo checks. Additionally, special symbols on the report indicate whether the check was transferred, re-opened, split, or added.

You can filter the report by View, Employee, and Business Day. You can generate the report for a property, revenue center, prompt, or inherit.

CHK	OPENED/CLOSED	PAYMENT
379	3/3/2017 2:42 PM	102.25
	3/3/2017 2:43 PM	1
	3/3/2017 2:43 PM	
380	3/3/2017 2:45 PM	6.75
	3/3/2017 2:45 PM	1
	3/3/2017 2:45 PM	
381	3/3/2017 2:46 PM	6.75
	3/3/2017 2:46 PM	1
	3/3/2017 2:46 PM	
382	3/3/2017 3:31 PM	4.50
	3/3/2017 3:31 PM	1
	3/3/2017 3:31 PM	
383	3/3/2017 4:28 PM	0.00
	3/3/2017 4:29 PM	0 C
	3/3/2017 4:29 PM	
384	3/3/2017 4:29 PM	0.00
	3/3/2017 4:30 PM	0 C

Figure 18-10 Sample Employee Closed Check Report

Employee Labor Detail Report

The Employee Labor Detail Report provides an account of work performed by each employee. The report shows 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.

You can filter the report by Employee or Period. The Begin Date and End Date fields become active when you select the **Period** as **Enter Dates**. You can generate the report for a property, prompt, or inherit.

EMP LABOR DETAIL - Employee Labor Detail

Employee	All	<input type="button" value="..."/>
Period	Today	<input type="button" value="..."/>
Begin Date	3/3/2017	<input type="button" value="..."/>
End Date	3/3/2017	<input type="button" value="..."/>

Employee Labor Detail
Start Mar 3 2017 12:00PM
End Mar 3 2017 5:19PM

3 Peterson, Kim
Server Cafe

	Business Date	Mar 3
IN	Mar 3 2017 3:30PM	No schedule
OUT	Mar 3 2017 3:41PM	No schedule
	Regular Hours	0.17
	Overtime Hours	0.00

IN Mar 3 2017 3:41PM
No schedule
OUT Mar 3 2017 3:41PM
No schedule

	Business Date	Mar 3
IN	Mar 3 2017 3:41PM	No schedule
OUT	Mar 3 2017 3:41PM	No schedule
	Regular Hours	0.00
	Overtime Hours	0.00

Server TOTAL
RATE HOURS PAY
REG 2.00 0.17 0.34
OVT 3.00 0.00 0.00

Run
Print
Printers
Full Screen

Figure 18-11 Sample Employee Labor Detail Report

Employee Labor Summary Report

The Employee Labor Summary Report shows a summary of the regular and overtime hours worked by each employee at each of their assigned pay rates.

You can filter the report by Employee or Period. The Begin Date and End Date fields become active when you select the **Period** as **Enter Dates**. You can generate the report for a property, prompt, or inherit.

EMP LABOR SUM REP - Employee Labor Summary

Employee	All	<input type="button" value="..."/>
Period	Today	<input type="button" value="..."/>
Begin Date	3/3/2017	<input type="button" value="..."/>
End Date	3/3/2017	<input type="button" value="..."/>

Employee Labor Summary
Start Mar 3 2017 12:00PM
End Mar 3 2017 5:19PM

3 Peterson, Kim

	RATE	HOURS	PAY
Server			
REG	2.00	0.17	0.34
OVT	3.00	0.00	0.00

	RATE	HOURS	PAY
EMPL REG		0.17	0.34
EMPL OVT		0.00	0.00
EMPL TTL		0.17	0.34

ALL REG		0.17	0.34
ALL OVT		0.00	0.00
GRAND TTL		0.17	0.34

Offline Workstations

Workstation	Offline Time
WIN864 KIVI	Days:Hours:Min 004:004:48
POSAPI2	084:001:16
POSAPI3	084:005:12

Run
Print
Printers
Full Screen

Figure 18-12 Sample Employee Labor Summary Report

Employee Journal Report

The Employee Journal Report is a journal of all sales transactions by a specific employee shown in a check detail layout. The journal shows every check that was created by a specific employee within the selected parameters. The check detail shows items that were purchased, voided, and so on, by an employee. You can select a specific date or a date range to look at for a specific employee.

Journal reports are not available in the Oracle Hospitality Reporting and Analytics Cloud Service.

EMP JOURNAL REPORT - Check Journal

View: Cafe

Check Number:

Business Day: Today

Time Span: 3/3/2017 0:00 - NOW

Journal Report

Rev Ctr: Cafe
Start: 3/3/2017 12:00 AM
End: 3/3/2017 5:20 PM

=====

TRN 16/0 MAR03 17 14:30

Cafe

Application Restart

TBL 4/1 CHK 379 GST 5
90001 MICROS 90001

TRN 16/824 MAR03 17 14:42

Cafe

Guest count has changed

TBL 4/1 CHK 379 GST 5
90001 MICROS 90001

TRN 16/824 MAR03 17 14:43

Cafe

=====

IS- GRANOLA 100.00
IS- GRILLED HAM 2.25
Cash 102.25
Food Sales 102.25
Total Paid 102.25

=====

Run

Print

Printers

Full Screen

Figure 18-13 Sample Check Journal Report

Employee Tip Report

The Employee Tip Report summarizes the total tip activity by an employee. You can filter the report by View, Employee or Period. The Begin Date and End Date fields become active when you select the **Period** as **Enter Dates**. You can generate the report for a property, revenue center, prompt, or inherit.

Labor Availability Report

The Labor Availability Report gives a count of all employees clocked in, or on break at the time the report is taken. The report allows only a choice of View. You can generate the report for a property, a revenue center, prompt, or inherit.

JOB	IN	BRK	TOTAL
1 Server	1	0	1
SUBTOTAL	1	0	1
TOTAL	1	0	1

Workstation	Offline Time Days:Hours:Min
WIN864 KIVI	004:005:03
POSAPI2	084:001:31
POSAPI3	084:005:28
POSAPI4	128:001:22
POSAPI10	128:000:45
WS5A	119:004:06
1XWINDOWS7	001:002:50
POSAPI9	084:003:42
Tablet	086:022:49
POSREADY7	015:003:08
WINDOWS8 32	003:020:34

Figure 18-14 Sample Labor Availability Report

Financial Reports

Financial Report refers to any report that shows totals and other information relating to finances. You can generate Financial Reports for a property, revenue center, employee or cashier. While the scope of the information is different (an RVC Financial Report shows totals for one revenue center, but an Employee Financial Report shows totals for only one employee), the layout and fields are similar for every type of Financial Report. Simphony FE provides the following Financial Reports:

- System Financial Report: Shows sales and check information for a property, with a configurable tracking section.
- Revenue Center Financial Report: Shows sales and check information for a revenue center, with a configurable tracking section.
- Employee Financial Report (system/revenue center scope): Shows sales and check information for an employee, with a configurable tracking section.
- Cashier Financial Report (system/revenue center scope): Shows financial information for each cashier, including tenders and tips paid. No fixed report format, consists entirely of a configured tracking group.
- Serving Period Financial Report (revenue center scope): Shows financial reporting by serving period. May or may not be time controlled.
- Time Period Summary Report (revenue center scope, flexible report configuration): Shows each time period on a single line with sales information. Can have multiple time periods and they can overlap.

- Time Period Detail Report (revenue center scope): Shows each time period as a full report, with a similar format to a System Financial Report (sales, check profiles, tracking group). Can have multiple time periods and they can overlap.
- Income Audit Report (revenue center scope, flexible report configuration): A completely configurable report that can show serving period information by revenue center on a single report.

Menu Item Waste Reports

Menu Item Waste Reports provide an overview of discarded menu items resulting from spillage, spoilage, or compromised quality standards so that you can take action to reduce inventory loss in your revenue center. You can generate waste reports by revenue center, menu item, employee, and waste reason. Menu Item Waste Reports are accessible through both the workstation and online in Oracle Hospitality Reporting and Analytics Advanced.

If you installed Reporting and Analytics Advanced on a server separate from Simphony First Edition, the Menu Item Waste Reports do not copy to the reporting server when upgrading to Simphony First Edition version 1.7.

In order to use the Menu Item Waste Reports, after upgrading both the application and reporting servers to Simphony First Edition version 1.7, copy the following Menu Item Reports on the application server from

<Drive>:\Micros\Simphony\MyMicros\myInsight\org\10001\reports and move them to
<Drive>:\Micros\Simphony\MyMicros\myInsight\org\10001\reports on the reporting server:

- WasteEmployeeSummaryUWS.xml
- MMWasteDetailSummaryUWS.xml
- MMWasteEmployeeSummaryUWS.xml
- MMWasteMenuItemSummaryUWS.xml
- MMWasteReasonSummaryUWS.xml

Waste Detail Report

The Waste Detail Report shows in-depth information about wasted menu items grouped by the waste reason. Details include: the check number, employee associated with the waste check, list of menu items wasted, the corresponding waste quantity, and the total revenue lost.

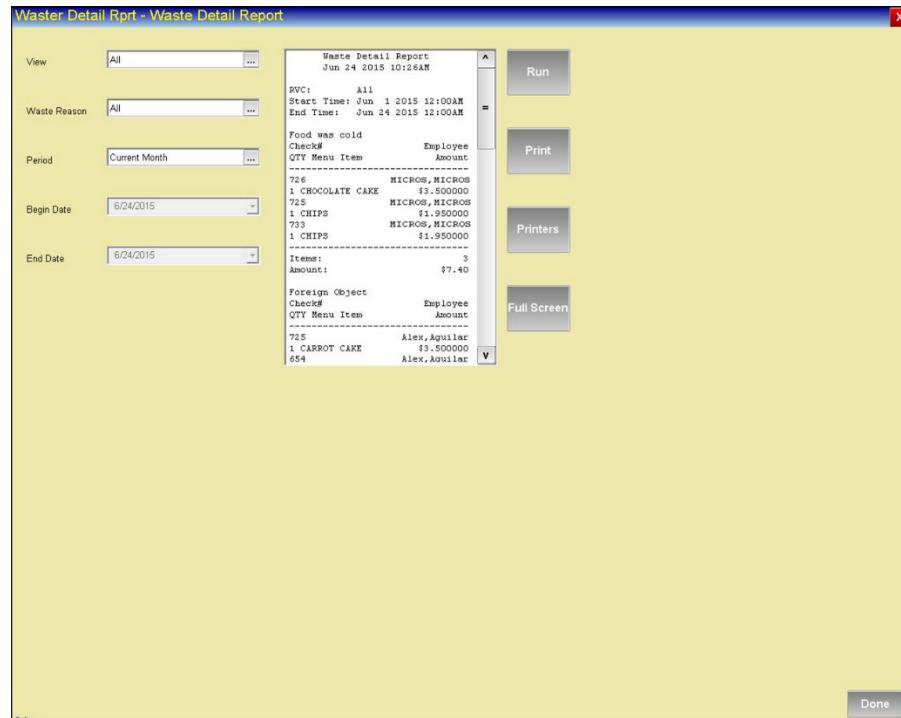


Figure 18-15 Sample Waste Detail Report

Waste Summary Report

The Waste Summary Report shows an overview of the menu items wasted and the corresponding waste quantity grouped by the waste reason. You can filter the report data by waste reason.

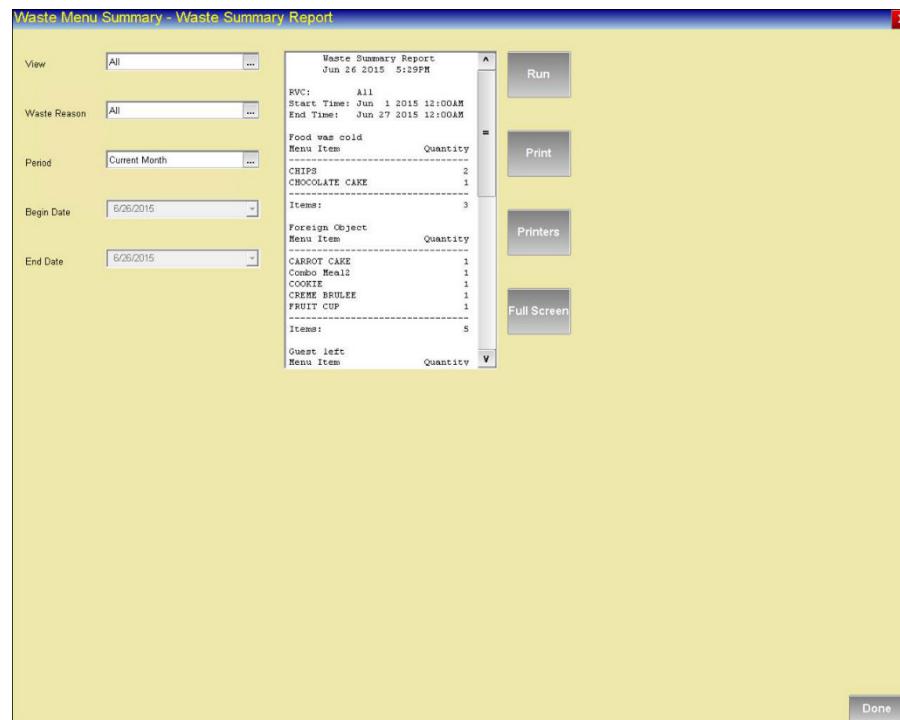


Figure 18-16 Sample Waste Summary Report

Employee Waste Report

The Employee Waste Report shows a summary of the waste checks (waste reasons and the quantity of menu items wasted) created by each employee. If you filter by employee, this report shows a summary of the waste checks created by the selected employee.

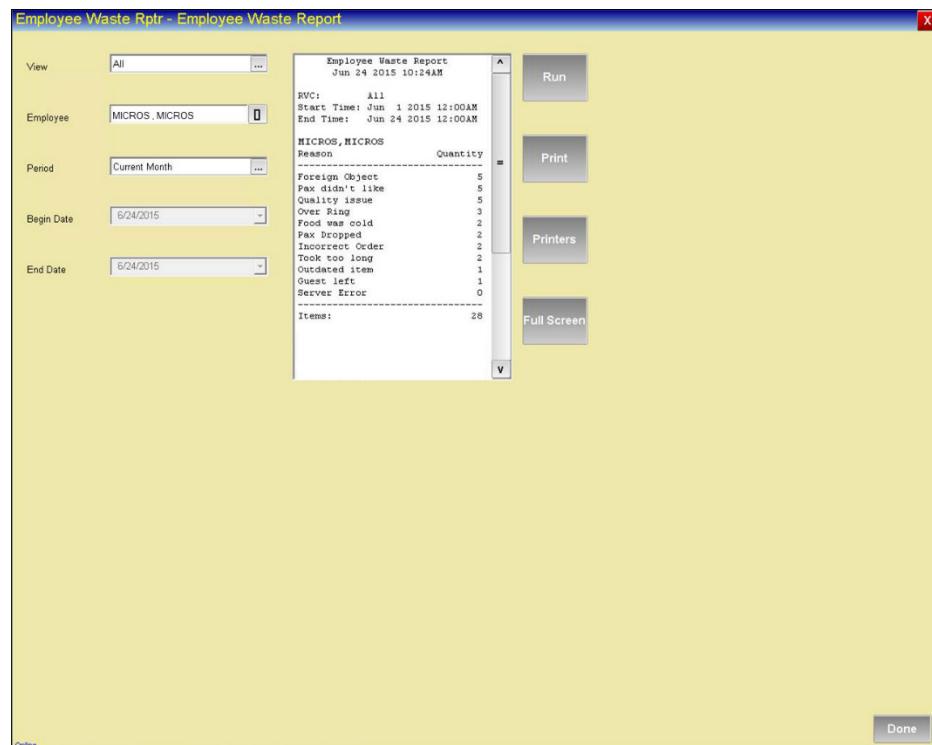


Figure 18-17 Sample Employee Waste Report

Menu Item Waste Report

The Menu Item Waste Report shows the waste reason and the quantity of menu items wasted grouped by menu item. At the end of the report, a summary of menu items wasted for each family group is shown. You can filter the report by family group.

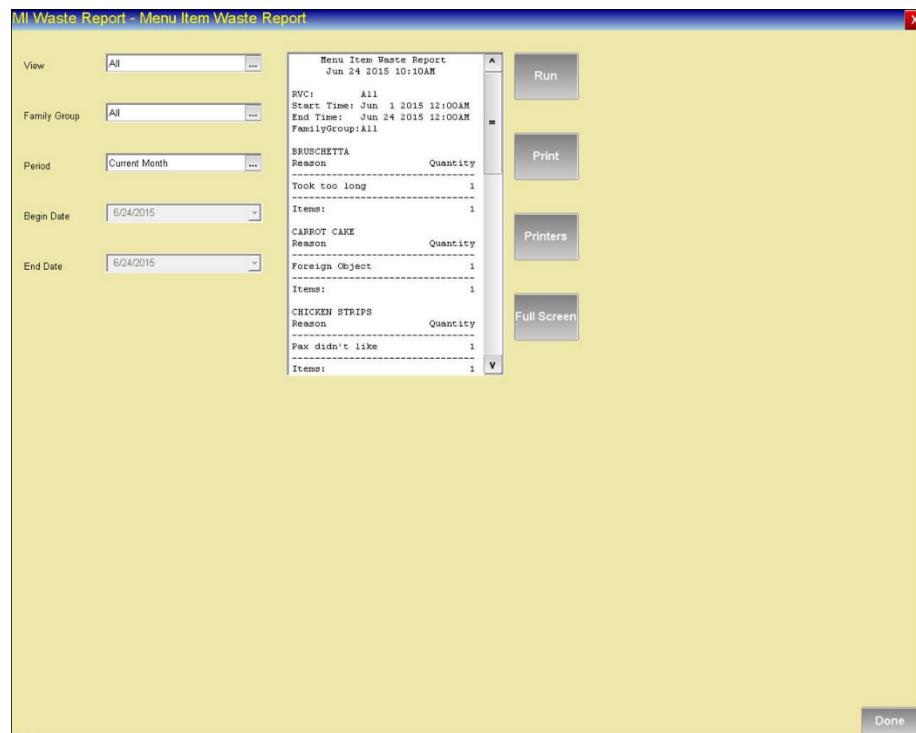


Figure 18-18 Sample Menu Item Waste Report

Employee Check Journal Report

The Employee Check Journal Report distinguishes an employee's menu item waste checks using a Menu Item Waste Transaction banner.

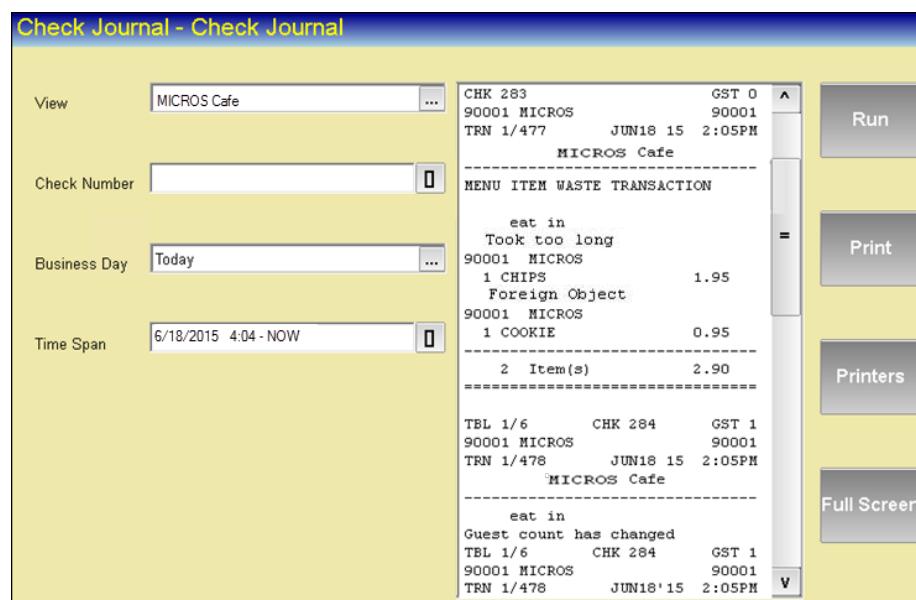


Figure 18-19 Sample Employee Check Journal Report

Configuring Menu Item Waste Reports

You need to configure Workstation Autosequences to run waste reports.

1. Select a property, and then select **Workstation Autosequences** (under Reporting).
2. Insert a new autosequence record, enter a name, and then click **OK**.
3. Double-click the autosequence record.
4. In the first row under the Step Type column, select **1 – Report**.
5. Click **Configure** from the next column. The Step 1: Report dialog box appears.
6. From the **Report** drop-down list, select the waste report, select other applicable options, and then click **OK**.
7. Click the **Options** tab, select the **Privilege Group**, and then click **Save**.

Configuring Menu Item Waste Report Privileges

To allow an employee to generate waste monitoring reports, you must grant privileges for employees to use Property Management Console (PMC) reports. The PMC is a module on the workstation that allows operators to run reports.

1. Select the enterprise, and then select **Roles**.
2. Click the **Operations** tab, and then click the **PMC General/Reports** subtab.
3. In the Autosequence Options section, select the privilege assigned to the privilege group that you set in the previous section, and then click **Save**.

Generating Waste Reports

You can generate Waste Reports from the workstation or by using autosequence function keys (if configured).

1. Select the function for **Reports**, or click the appropriate autosequence function key.
2. Select the revenue center (if prompted).
3. Select the report, and then click **OK**.

Reporting and Analytics Advanced

Combo Items Summary Report

The Combo Items Summary report tracks combo meal transactions and the associated menu items. To add the report to the portal, see the instructions outlined in the *Oracle Hospitality Reporting and Analytics User Guide*, located at http://docs.oracle.com/cd/E65545_01/index.html.

Combo Items Summary									
Menu Item	Net	% Net	Qty	% Qty	Sales as	% Net	Qty as	Qty	Qty as
	Sales	Sales	Sold	Sold	Combo	Sales	Combo	À La Carte	Combo
TOTAL:	358.50	100.00%	60	100.00%	358.50	100.00%	60	0	100.00%
Cheeseburger/1	298.50	83.26%	30	50.00%	298.50	8.37%	30	0	100.00%
SM Fries/1	60.00	16.74%	30	50.00%	60.00	8.37%	30	0	100.00%
Combo Item Component	Combo Sales	% Net Sales	Combos Sold	Menu Items Sold	% Items Sold	% Combo Component			
TOTAL:	358.50	100.00%	30	60	100.00%				
Cheeseburger/1	358.50	100.00%	30	60	100.00%				
Cheeseburger/1	60.00	16.74%	0	30	50.00%				
SM Fries/1	298.50	83.26%	30	30	50.00%				

Figure 18-20 Sample Combo Items Summary Report

You can view additional combo meal information by running the Daily Operations Report. You can drill down for sales details and totals by clicking **Net Sales**, **Sales Mix Summary**, and then **Sales Mix by Item Group** (which drills down to the check detail level).

Employee Closed Check Report

You can run the Employee Closed Check Report per location and revenue center, as well as for a specific date or date range for any specific employee. The report lists each check closed by check number. This allows users at the enterprise level to see the report outside of the store.

Figure 18-21 Sample Employee Closed Check Report

Employee Tip Report

You can run the Employee Tip Report per location and revenue center, as well as for a specific date or date range for any specific employee. This allows users at the enterprise level to see the report outside of the store.

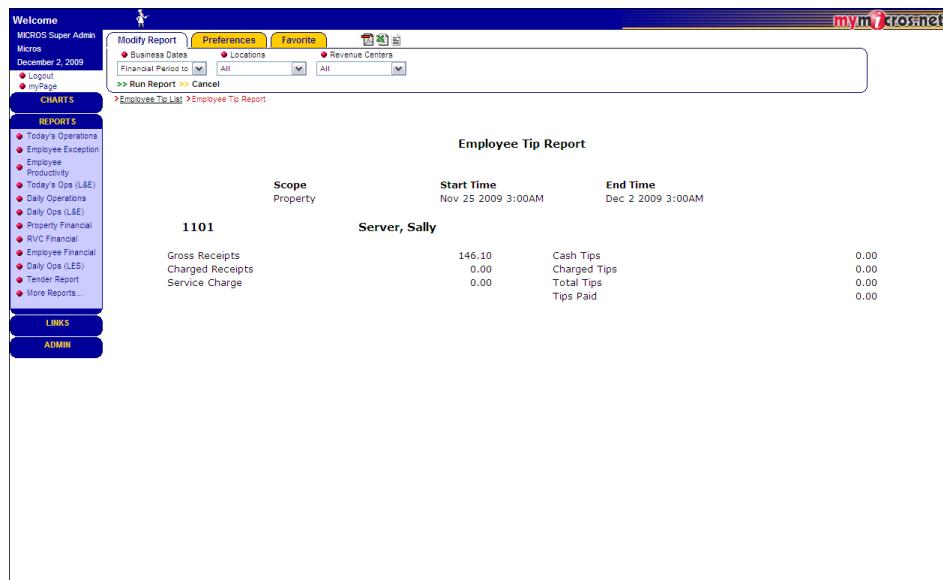


Figure 18-22 Sample Employee Tip Report

Waste Reports

Drill down into Waste Report to view the Quick Count Item Variance Report, Consolidated Menu Item Waste Detail by Employee Report, Consolidated Menu Item Waste by Menu Item Report, and the Consolidated Menu Item Waste Reason by Employee Report. To add the report to the portal, see the [Oracle Hospitality Reporting and Analytics User Guide](#).

Quick Count Item Variance Report

The Quick Count Item Variance Report shows a comparison between the actual inventory usage and theoretical inventory usage for the time frame that you select.

Quick Count Item Variance								Bruno The Manager	
Period From : 06/05/2015 To : 06/05/2015				Printed on Wednesday, June 10, 2015 - 2:45 AM				MICROS Cafe - MICROS Cafe	
Ingredient Name	Beginning Inventory	Delivery	Waste	Usage	Theoretical inventory	Actual inventory	Variance		
Period 1	06/05/2015								
Chicken	0.00	0.00	0.00		0.00	0.00	20.00		
Ground Beef	0.00	0.00	0.00		0.00	0.00	30.00		
Period 2									
Cheese	0.00	5.00	1.00	2	2.00	1.00	-1.00		
Chicken	20.00	10.00	2.00	2	28.00	15.00	-11.00		
Ground Beef	30.00	12.00	3.00	2	37.00	28.00	-9.00		
Period 3									
Cheese	1.00	0.00	0.00		1.00	1.00	0.00		
Chicken	15.00	0.00	0.00		15.00	11.00	-4.00		
Ground Beef	28.00	0.00	0.00		28.00	29.00	1.00		
Salmon	0.00	4.00	2.00	2	0.00	0.00	0.00		
Period 4									
Cheese	1.00	3.00	1.00	2	1.00	4.00	3.00		
Chicken	11.00	4.00	3.00	2	10.00	5.00	-5.00		
Ground Beef	29.00	5.00	2.00	2	30.00	5.00	-25.00		
Salmon	0.00	7.00	1.00	2	4.00	66.00	62.00		

Figure 18-23 Sample Quick Count Item Variance Report

Consolidated Menu Item Waste Detail by Employee Report

The Consolidated Menu Item Waste Detail by Employee Report shows the amount and cost associated with wasted menu items for the time frame that you select grouped by revenue center and employee. The results are presented as a percentage of the totals for each revenue center.

Consolidated Menu Item Waste Detail by Employee						
MICROS System - Bar & Grill						
Period from : 06/01/2015 To : 06/26/2015	Menu Level	Quantity	Amount	% of Ttl	Cost	% of Ttl
1 - Restaurant						
1 - Smith, John						
101002 Crab Cakes	Reg.	1	6.95	21.58%	0.00	0.00%
101005 Chicken Tenders	Reg.	1	5.50	17.08%	0.00	0.00%
101006 Tom & Buff Mozz	Reg.	1	6.75	20.96%	0.00	0.00%
101103 Onion Soup	Reg.	1	5.00	15.53%	0.00	0.00%
101106 Gazpacho	Reg.	1	4.00	12.42%	0.00	0.00%
106004 Tira Misu	Reg.	1	4.00	12.42%	0.00	0.00%
		6	32.20	100.00%	0.00	0.00%
Restaurant Total						
Report Total						

Figure 18-24 Sample Consolidated Menu Item Waste Detail by Employee Report

Consolidated Menu Item Waste Detail by Menu Item Report

The Consolidated Menu Item Waste Detail by Menu Item Report shows the amount and cost associated with wasted menu items for the time frame that you select grouped by revenue center and menu item. The results are presented as a percentage of the totals for each revenue center.

Consolidated Menu Item Waste Detail by Menu Item						
		MICROS System - Bar & Grill				
Period From : 06/01/2015 To : 06/26/2015		Printed on Sunday, June 28, 2015 - 1:00PM				
Menu Level	Quantity	Amount	% of Ttl	Cost	% of Ttl	Bruno The Manager
1 - Restaurant						
101002 Crab Cakes	Reg.	1	6.95	21.58%	0.00	0.00%
101005 Chicken Tenders	Reg.	1	5.50	17.08%	0.00	0.00%
101006 Tom & Buff Mozz	Reg.	1	6.75	20.96%	0.00	0.00%
101103 Onion Soup	Reg.	1	5.00	15.53%	0.00	0.00%
101106 Gazpacho	Reg.	1	4.00	12.42%	0.00	0.00%
106004 Tira Misu	Reg.	1	4.00	12.42%	0.00	0.00%
Restaurant Total	6	32.20	100.00%	0.00	0.00%	
Report Total	6	32.20		0.00		

Figure 18-25 Sample Consolidated Menu Item Waste Detail by Menu Item Report

Consolidated Menu Item Waste Reason by Employee Report

The Consolidated Menu Item Waste Reason by Employee Report shows a detailed summary of the waste checks created by each employee grouped by the waste reason.

Consolidated Menu Item Waste Detail by Employee						
		MICROS System - Bar & Grill				
Period from : 06/01/2015 To : 06/26/2015		Printed on Sunday, June 28, 2015 - 12:00 AM				
Menu Level	Quantity	Amount	% of Ttl	Cost	% of Ttl	Bruno The Manager
1 - Restaurant						
1 - Kramer, Phil						
101002 Crab Cakes	Reg.	1	6.95	21.58%	0.00	0.00%
101005 Chicken Tenders	Reg.	1	5.50	17.08%	0.00	0.00%
101006 Tom & Buff Mozz	Reg.	1	6.75	20.96%	0.00	0.00%
101103 Onion Soup	Reg.	1	5.00	15.53%	0.00	0.00%
101106 Gazpacho	Reg.	1	4.00	12.42%	0.00	0.00%
106004 Tira Misu	Reg.	1	4.00	12.42%	0.00	0.00%
Restaurant Total	6	32.20	100.00%	0.00	0.00%	
Report Total	6	32.20		0.00		

Figure 18-26 Sample Consolidated Menu Item Waste Reason by Employee Report

Consolidated Menu Item Waste Reason by Menu Item Report

The Consolidated Menu Item Waste Reason by Menu Item Report shows a detailed summary of wasted menu items groups by the waste reason.

Consolidated Menu Item Waste Reason by Menu Item						
Period from : 06/01/2015 To : 06/26/2015		Printed on Sunday, June 28, 2015 - 12:00 AM				
		Menu Level	Quantity	Amount	% of Ttl	Bruno The Manager
Guest Chg'd Mind						
4006	Grill Chkn Sand	Reg.	1	5.25	22.15%	0.00
90601	French Fries	Reg.	1	0.00	0.00%	0.00
Guest Didn't Like						
2004	Lobster Bisque	Reg.	1	5.25	22.15%	0.00
3002	Fruit Salad	Reg.	1	7.95	33.54%	0.00
Foreign Object						
3001	House Salad	Reg.	1	5.25	22.15%	0.00
90901	Italian	Reg.	1	0.00	0.00%	0.00
		Quick Service Total	6	23.70	100.00%	0.00
		Report Total	6	23.70		0.00

Figure 18-27 Sample Consolidated Menu Item Waste Reason by Menu Item Report