Oracle® Hospitality BellaVita
Schedules Installer Guide
Release 2.7

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# Contents

# Preface

This document has been created to provide guidelines for the activation and use of BellaVita Schedules after the configuration of Master Data.

## Audience

This guide is intended for BellaVita product specialists and support familiar with BellaVita.

## Customer Support

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

When contacting Customer Support, please provide the following:

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

## Documentation

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

## Revision History

| Date | Description of Change |
| --- | --- |
| August 1, 2013 | • Initial publication.<br>Document Version Number: 1.0 |

# 1 Schedules

Schedules are the main workspace in BellaVita. This is the calendar of the resources where all scheduled hours, booking and other occupancies can be administered. Most daily functions are available from the main schedules of BellaVita which can be set up in unlimited versions to suit the customer's needs.

Some schedules in BellaVita are generated at the time of installation; others can be created according to customer requirements. All are explained below.

# 2 Default Schedules

The schedules generated automatically at the time of the installation are shown below. You find them under Administration / Schedules

## Employee Schedule



This schedule is displayed in Master Data / Employees / Schedule tab. It shows the presences, absences and bookings for the particular employee. You have the possibility to create bookings for offers, packages, and absences and edit existing ones on this schedule.

# Facility Schedule



This schedule is displayed in Master Data / Facilities / Schedule tab. You have the possibility to create bookings for offers, packages, and absences and edit existing ones on this schedule.

(Absences on Facilities function as Out of Order/Out of Service.)

# Employee (Presence) Schedule



This schedule is displayed in Master Data / Employees / Presence tab. It is the only place where you can add/edit presences (working hours) to the employees.

# Offer Schedule



This schedule is displayed in Master Data / Offers / Schedule Multiple-Offers tab. It is only active when the offer is marked as multi offer. You can add new times for the multi offer or edit the existing ones here.

# Guest Schedule



This schedule is displayed Profile / Schedule tab. It shows the bookings for the particular guest. You have the possibility to create/edit bookings for offers, packages.

# System schedules

There is one additional schedule in Administration by default, which is also named as Employee schedule. This is the main schedule displayed under the Schedules menu option.





You can recognise it by the default number of displayed days is 1 (while the rest are 5).

# 3 Settings and display options

## Display options



| Field | Schedule type | Description |
|---|---|---|
| *Description* | System | The name under which the main schedule will appear in the menu. |
| *Display absent employees* | System | On the system schedule of employees displays only present employees if not ticked. |
| *Displayed number of days* | ALL | For guest schedules practical to show the average stay days. If most guests stay for 2 weeks, change this to 14. On the employee schedules if the presences are usually scheduled for 1 week only, change this to 7 days, etc. For main schedule usually leave it on 1 day, but can also set up 1 week, or 3 day overview. |
| *Displayed hours* | ALL | The number of hours displayed on the schedule. Usually it is matching the opening hours. |
| *Displayed start hour* | ALL | The first hour on the schedule displayed on the schedule by default. |
| *Grid time in minutes* | ALL | The number of minutes in a grid. Practical to set it for 30 or 60 minutes depending on the length of treatments and the opening hours. |
| *Minimal drop time* | ALL | This determines where the drop can result in the drag and drop function and also the bookings' default start time when starting the |

| | | progress on the schedule. If set to 5 minutes, this means the bookings can start at any 5 minutes of the hour. If set to 60, all drag and drop result in the start of bookings on the hour. |
|---|---|---|
| *Display all Employees* | System | Used to display all the employees, instead of adding all as resources. Only on main employee schedule. |
| *Display preparing- and clearing times:* | ALL | Tick this box if you want to see the preparing and clearing times in the schedule. Never used on guest schedule. |
| *Start hour dynamic* | Where displayed days is 1 | When ticked, the Displayed start hour is always the most current past hour. |
| *Spa* | System | You can choose if you want to set a schedule for a given spa only. In Multi spa only! |
| *Formatter Profile* | System | These are the possible views of the system schedules. |

| Formatter | Description |
|---|---|
| Guest display | To show guest name as first line of the booking. |
| Offer display | To show offer description as first line of the booking. |
| Guest type display | Show bookings in the color of the guests' type color. Guest type set on Person tab of profile, color of guest type set in Administration/Settings |
| Booking status | To display the status of the bookings with colors.<br>Yellow = reserved<br>Green = checked in<br>Orange = no show<br>Dark green/stripped = settled+checked in<br>*The last one appears on all displays. Can also be set to change to this color if settled, but not checked in.*<br>*Parameter: ch.corix.w4y.bo.booking.Booking .denoteBilledBookingsEvenWhenNotConsumed* |
| Presence | To display employee presences and allow editing |
| View of employee per color | To see employees with their color assigned in Master Data – practical for system schedule of facilities |
| The lowest sequence determines the default view of each schedule. | |

| *Print templates* | System | The listed print templates are available from the right click menu / print option of the schedule. |
|---|---|---|
| *Resources* | System | Insert the resources you want to display on the schedule. |

# New Schedule
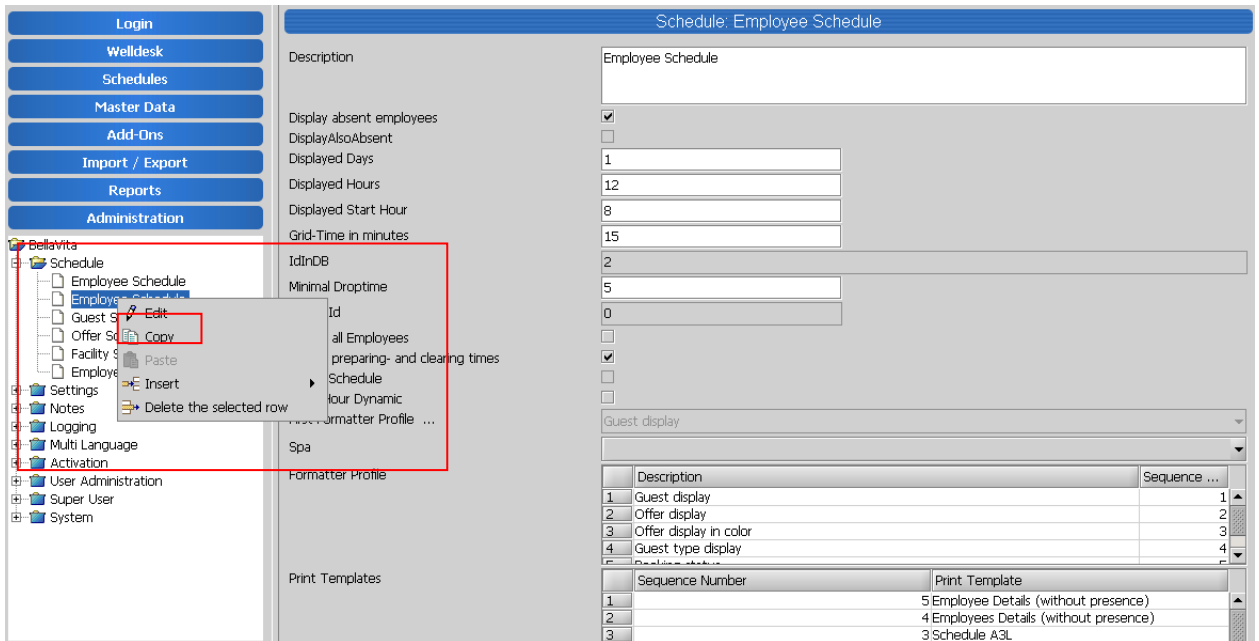
The only type of schedule that can be created is the system schedule.
Preferably a new schedule is created by copying the default one. Before copying please check that you selected the right Employee Schedule. Choose the one which by default displays 1 day (not 5).
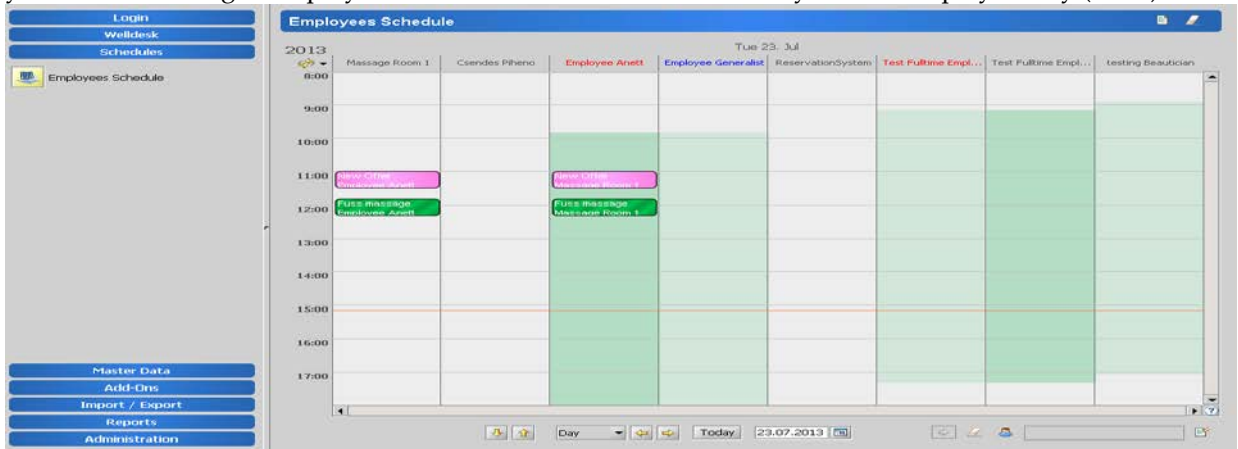


In Administration/ Schedule right click on the schedule and choose copy.



Right click on Schedule group and click paste
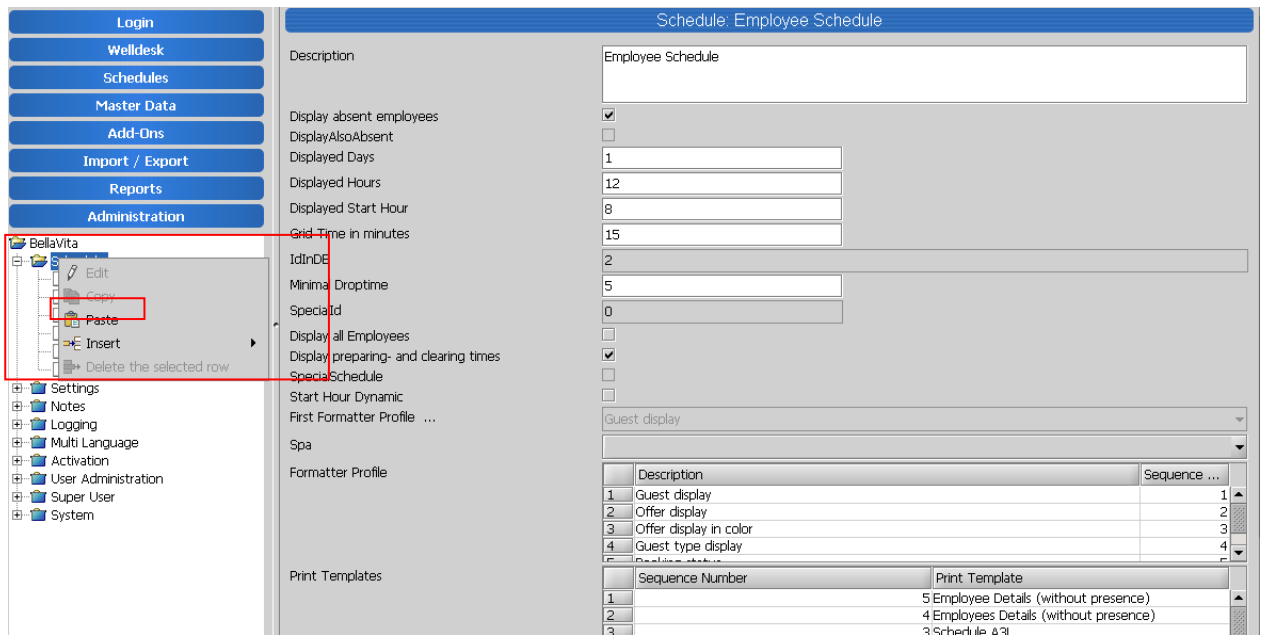
Save now. Rename the pasted schedule and save again.

## Displayed resources (Facility+Employee)

Resources can be added with right click in the box, insert new resource. Open the newly inserted line by double click on the blue round. This is where you can choose the new resource.
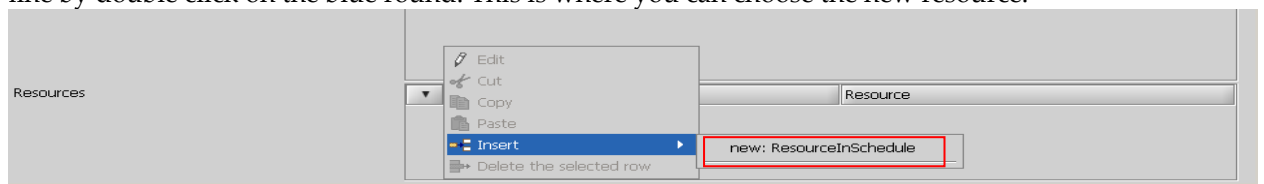


Search in resources and apply the selected resource.
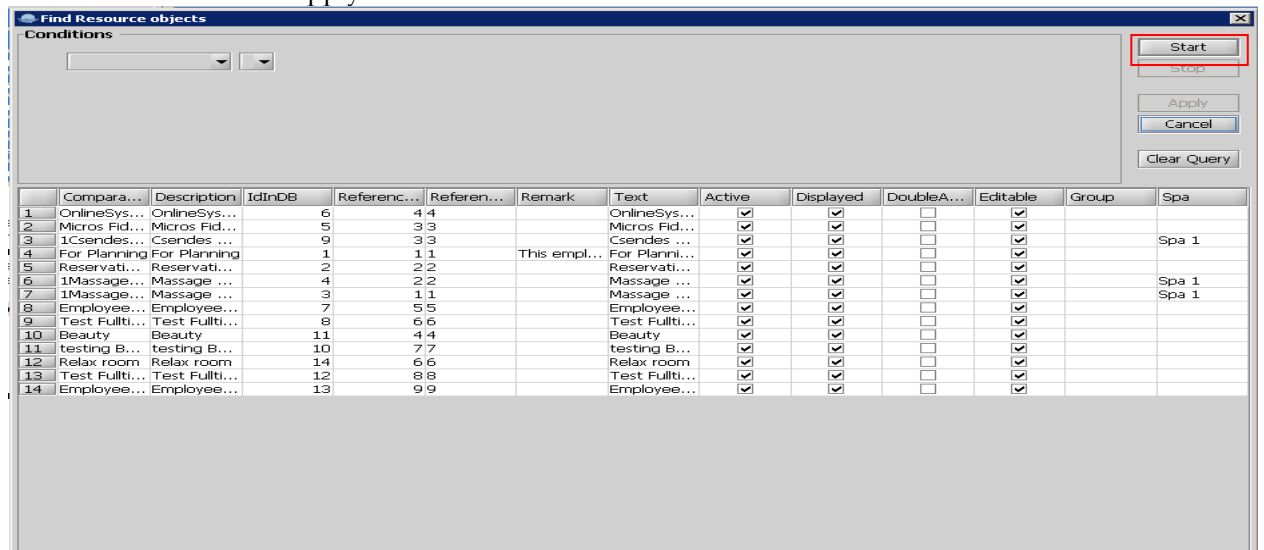


TIP: if your schedule is to display all employees use tick: All Employees, instead of adding them one by one.

SAVE the changes you made and start entering the new values. Make sure no new empty lines are saved before closing BellaVita.

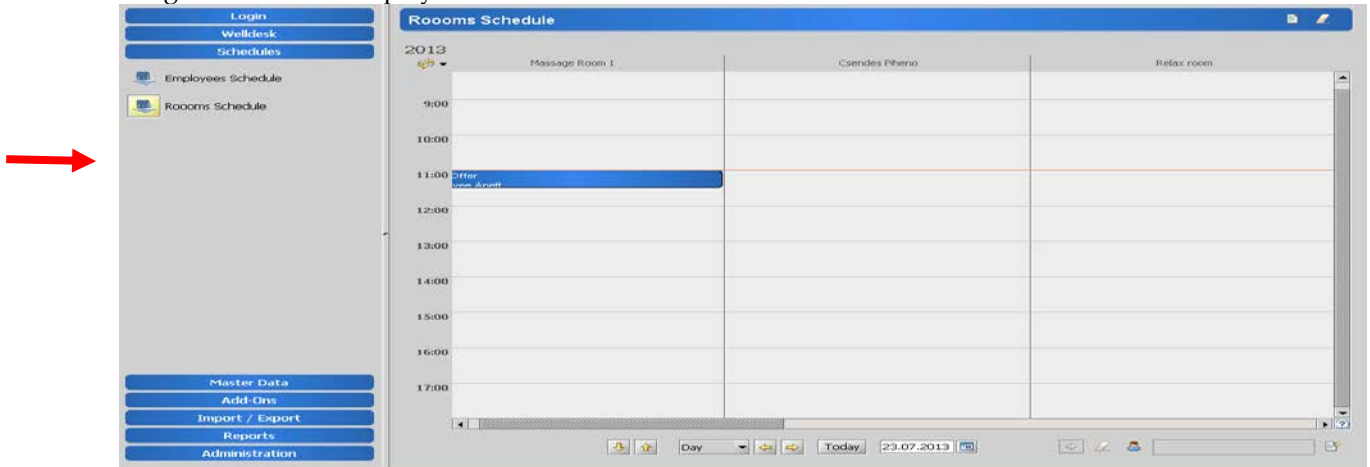When you restart BellaVita, the new schedule will appear under the Schedule menu point with the assigned resources displayed.



# Special Settings

## Employee Color Formatter Profile

In Administration/ Schedule/ Employees Schedule/ Formatter Profile choose one and copy paste it.



Rename the copied formatter profile.
Specification → insert → new: ScheduleFormatterSpecification. Then open the formatter profile and add a new specification.



The parameter should be set up as following:

Double clik on the formatter.

View of employees with colors:
- Formatter: bellavita.formatter.EmployeeFormatter
- Parameter:
  isShowingNotes=true:isShowingMembers=true;isBlinkingMembers=true;isShowingSpecial
ToolTip=true
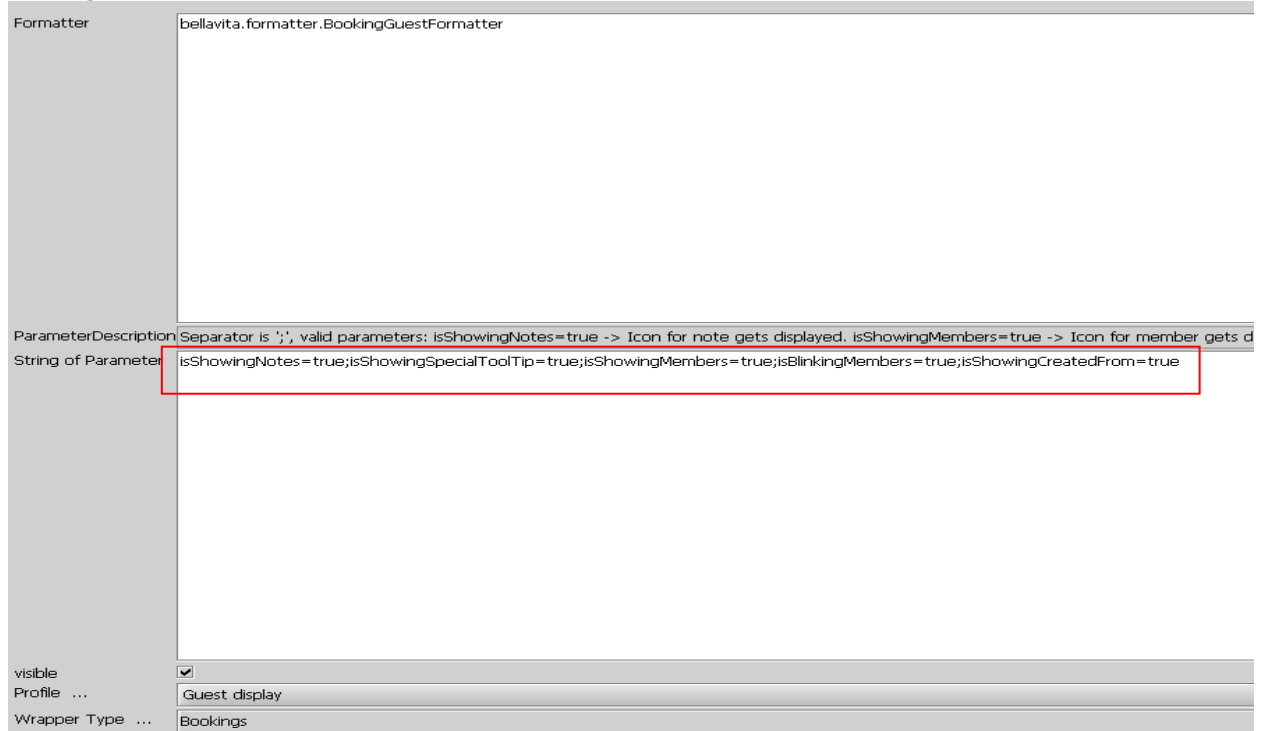


In Master Data/ Employee profile you can choose a color to be assigned to the employee.
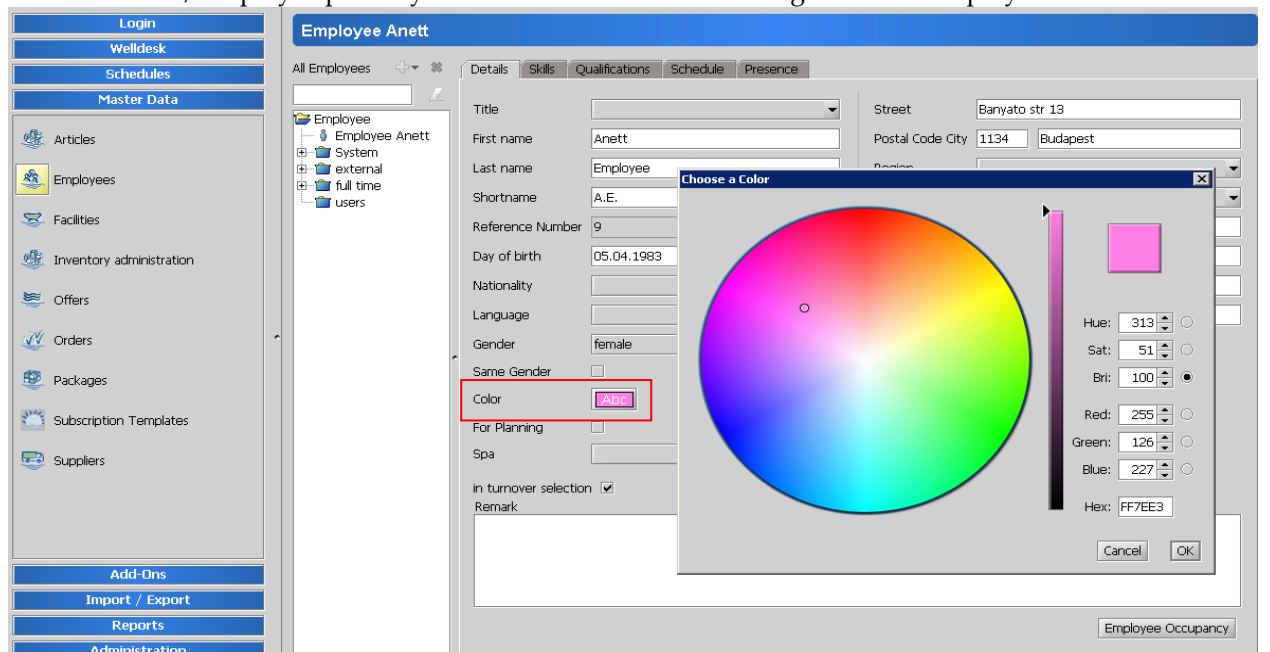


The color will be displayed in Schedules if you set the "View of employees per color" formatter.

# DoPrintExtendedDescription

To allow the print templates to print the notes on bookings.
In Administration/ Print template/ Print template choose a schedule.



open the print template and add new note by: right click > insert > finder.



Select DoPrintExtendedDescription and set to true.
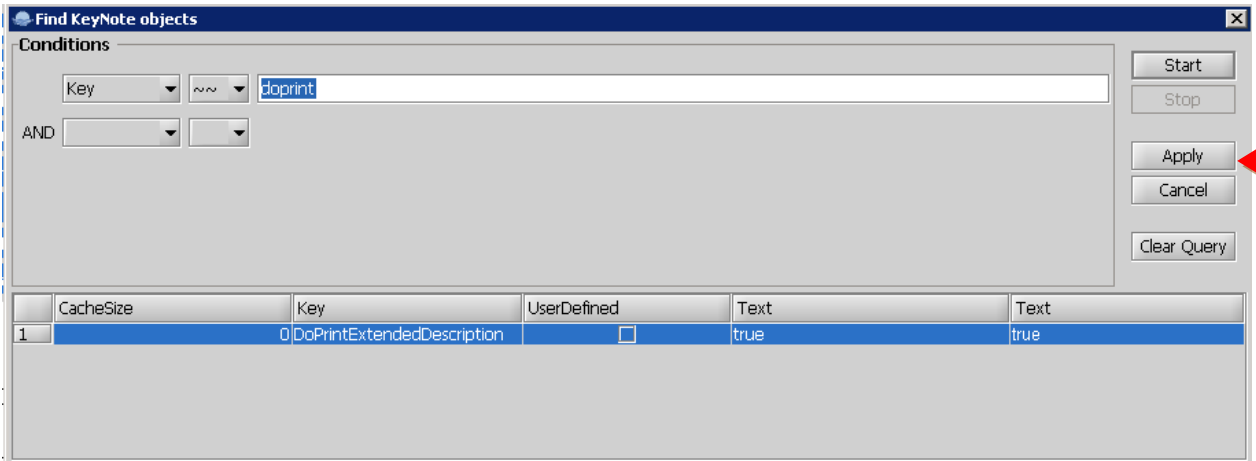
This means the Notes on profile and Remarks on bookings will be printed on the schedule print template.

If you set the profil notes not to show them on bookings, you won`t be able to see or print them on Schedules at all.
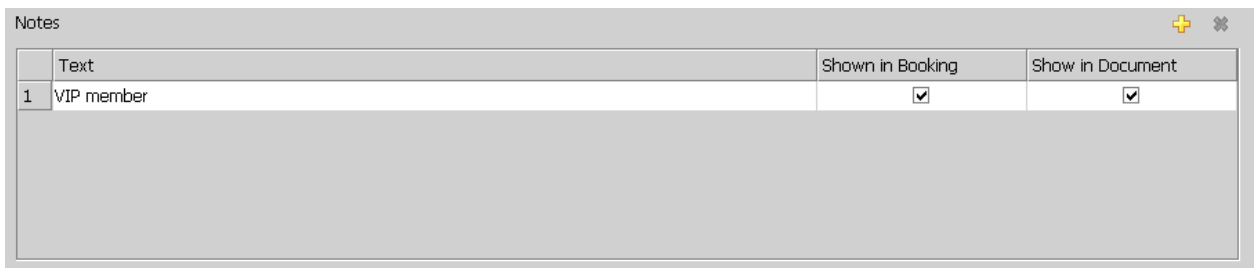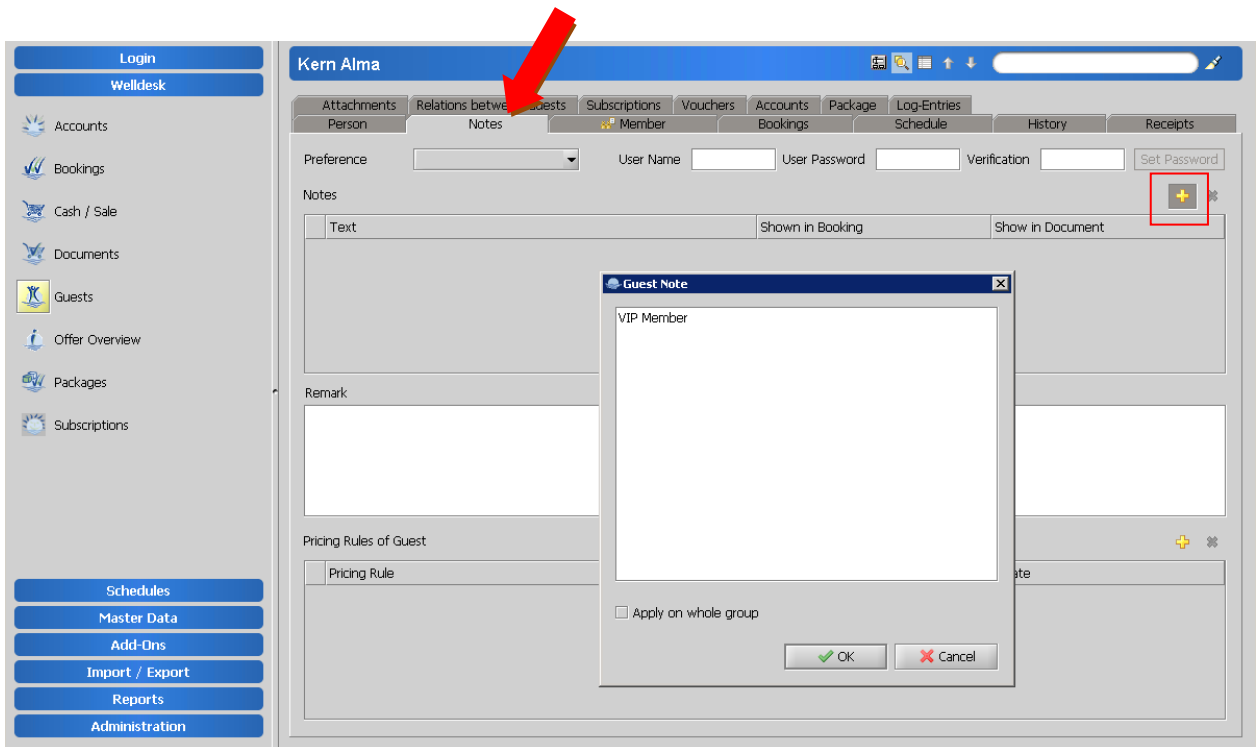
# Other related settings

Employee presence and absence are the core of the schedules and their available functionality. Below you can see the configuration and use of the presences and absence. Templates are created to help the everyday use, but all presences and absences can be created with ad hoc values.

## Configuration of Presence and Absence Template

<u>Presence Template</u>

Employee presence means the time interval when the employee is available. This can be configured in Administration / Settings / Templates / Presence: add a new Presence template with the yellow plus sign, for instance morning and afternoon shifts.
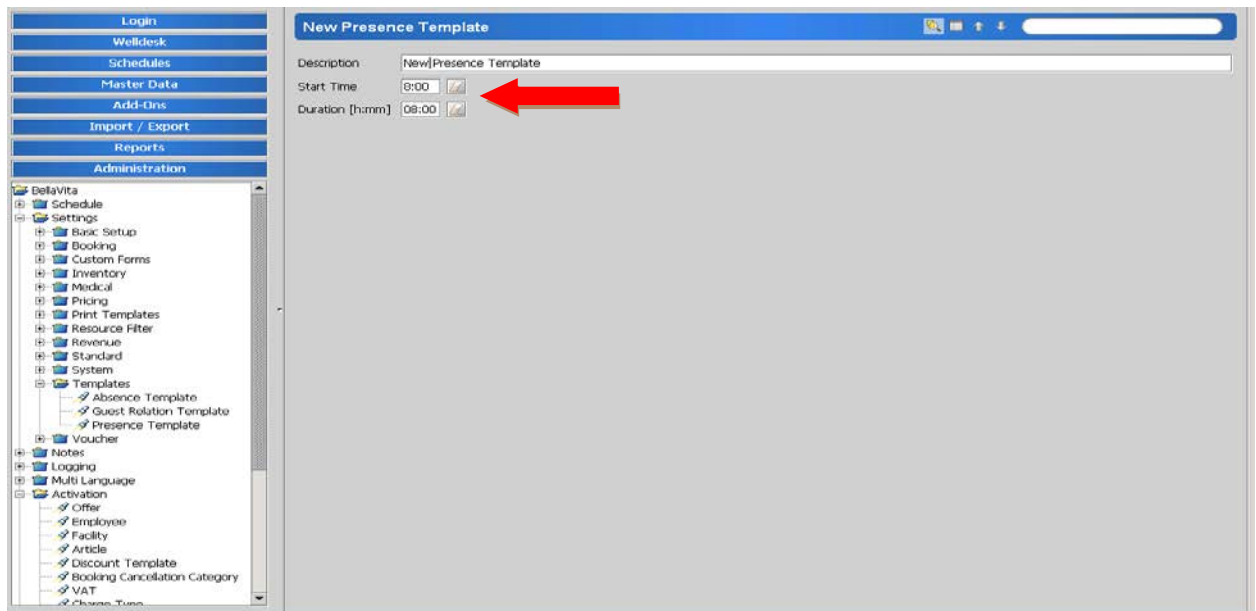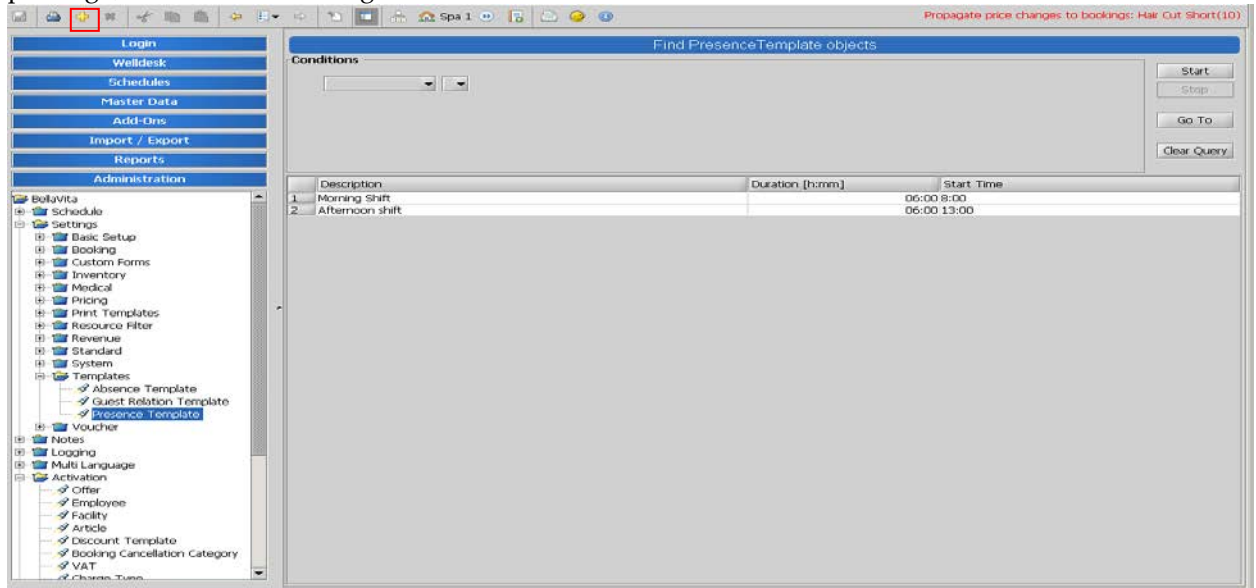




| Field | Description |
|---|---|
| *Description* | The name by which this template is available and shown on the Employee schedule (presence) |
| *Start time* | Not mandatory |
| *Duration* | The interval of the presence in minutes. |

## Absence Template

Absence template is used when the employee is not available; usually it is a Lunch Break, Meeting, etc. It is also used for Facilities to take them as out of service period.

Configure it in Administration / Settings / Templates / Absence template. Add new with the yellow plus sign.
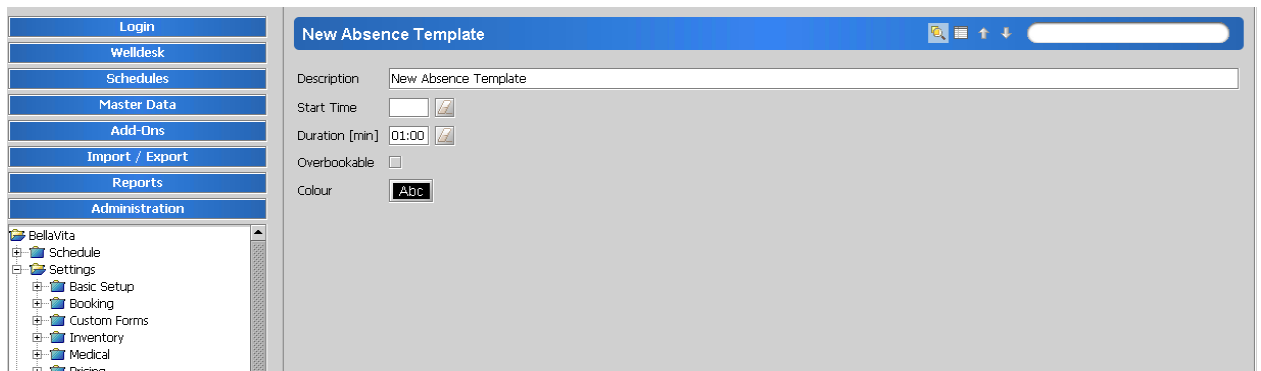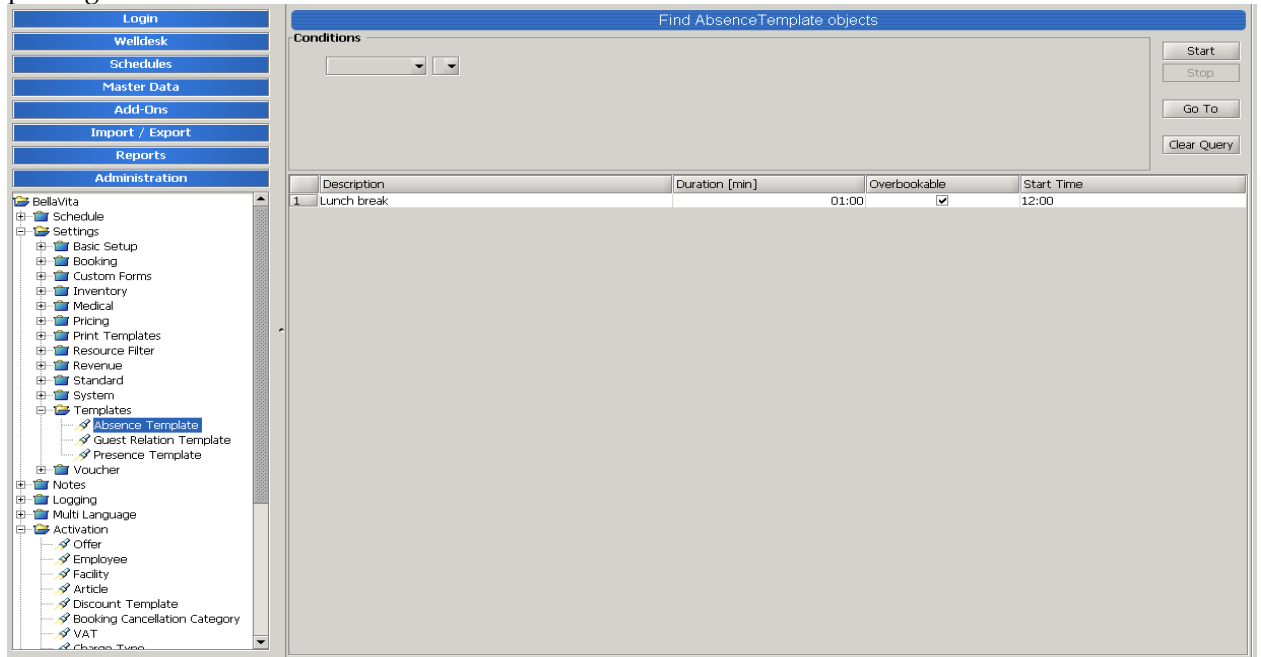




| Field | Description |
|---|---|
| *Description* | Name of template as it will appear on schedules. |
| *Start time* | Not mandatory |
| *Duration* | The interval of the Absence in minutes. |
| *Overbookable* | Resource can still be booked for the time of overbookable absence |
| *Colour* | The color it will be displayed on schedules. |

## Use of Presences and Absences

Presences can only be added on Employee Schedule (Presence) in Master Data / Employee / Presence tab.

The existing presences can be edited on any system schedule where "presence" formatter profile is available to bring the presence in the foreground.

Absences can only be added on schedules where the presence is shown in the background or on facility schedules where no presence is needed. For employees the absence can only be given within the time of the presences. If it is for the full time of the presence on a given day, the system takes it as if no presence has been entered in the beginning.

Both presences and absences are created the same way. You access them from the right click menu on the available schedules.

Right click on the schedule of presceces to add presence. You can choose from the options to add presence using template or not. (Templates set up in administration are useful if the shifts are mainly fixed hours. For example: Early Shift, Middle Shift, Late Shift, etc., this way you don't need to enter the same details all the time.)



Selecting the template means that you can choose from the already configured Shifts/Breaks.



Select the Spa (in multispa environment) and area (from version 2.7.2) to determine where this employee is available for bookings.

Enter or change the date, "from" and "to" times.
Select spa and area where the person is present in this time for work. Linking the presence to a spa only means availability in the whole spa. Selecting an area in this spa limits the availability of employee to this area only.

You can select the series for the repetition of this presence in the series option. Set up the duration end date or "end after" the number of repetitions.
The repetitions can be used in daily, weekly, monthly and yearly periodicity.

*Examples:*
*Series daily, every 1 day, ends after 5 appointment = the employee is scheduled for 5 consecutive days from the date set above.*
*Series weekly, every 3 weeks, ends after 2 appointments = employee is scheduled for the date set above and once more 2 weeks later.*

Once confirmed, all the presences are displayed. If you would like to change the whole series all together, just use the right click menu and edit series.
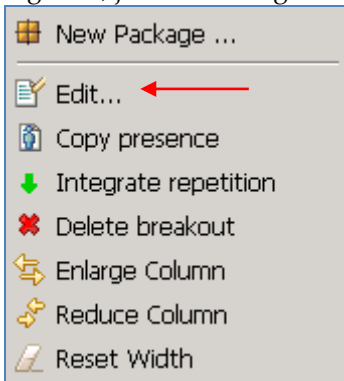


Use drag and drop to move one presence – this means that it will automatically be separated from the series and will be edited on its own. (The white squares at the top right corner of the presence show that it is part of a series, yellow means it is independent.)

Pressing the shift button and holding your cursor on the beginning or end of one shift, the cursor changes to a vertical arrow, which means that you can click and drag to extend or shorten the selected shift.

Use the 'Copy Presence' option to copy the selected shift(s) then select the future date or different employee's presence schedule where you would like to paste the same shift(s). This speeds up the process, and by editing the inserted presences, makes the presence creation much easier. Please note that when you past a presence, the start time will be matching the point you clicked on, and not the original start time.

From the Presences Tab you can print out the selected employees shifts for the certain time range by right clicking to the white area in the calendar, and selecting the 'Print' option.

The presences will be displayed on the general schedule. You can only edit and delete a presence there, not create. Presence can only be deleted, if there are no bookings or absences on it.


Absences

Right click on a displayed presence and select new absence from template or not. Set up the details as it is explained for presences with 2 other options:

*Not in house* is used for example in case of an absence set up for an external meeting.

*Overbookable* can be used in case you want to arrange the breaks flexible to the occupancy of the spa. This means that when making a booking, the system takes the overbookable absence as a bookable time of the employee – which helps you to complete the booking creation and you are able to change the absence later.
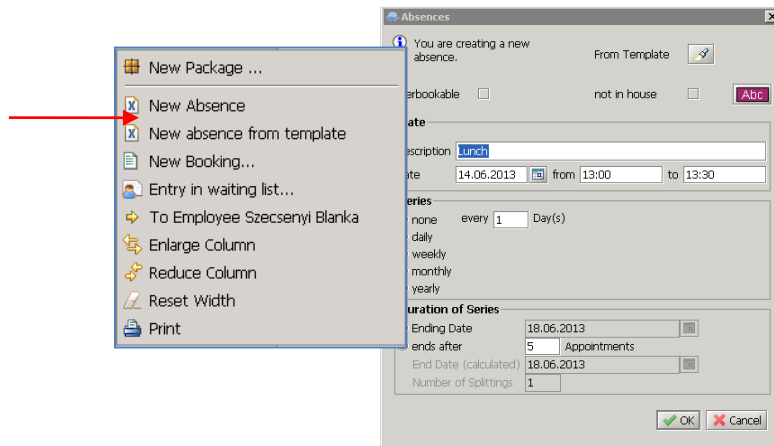
Changing absences can be done the same way as the case of presences, but on the schedules tab (and other schedules where the employee is displayed) instead of the presences tab.

It is practical to add the absences on the main daily schedule – so you can see the occupancy of the day and compare the schedule of all your employees. You can also use the option to copy absence, and paste it for another time or on other employees' presence.