

Oracle® Hospitality Simphony
Cloud Services Post-Installation or Upgrade Guide
Release 2.10
E89810-04

July 2018

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Preface

This guide is for Simphony Cloud Services users and provides post-installation steps to perform after a fresh installation or upgrade to Simphony version 2.10.

Beginning with the Simphony version 2.9 (or later) release, users must install Reporting and Analytics (R&A) separately from Simphony using the Back Office R&A installation application. For upgrades from versions prior to Simphony 2.9, users must upgrade to Reporting and Analytics version 8.5.1 Patch 3 prior to installing or upgrading to Simphony version 2.9.

Simphony version 2.10 is compatible with both R&A versions 8.5.1 Patch 3 and 9.0 Patch 8.

Audience

This guide is intended for installers, programmers, technical support teams, product specialists, and others who are responsible for setting up Simphony version 2.10.

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 any associated log files
- 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
February 2018	<ul style="list-style-type: none">• Initial publication
July 2018	<ul style="list-style-type: none">• Updates to Chapter 1 for post-upgrade steps for CAPS on IIS

1 Post-Installation Tasks

Update the Property EMC Client

The Enterprise Management Console (EMC) is the primary configuration application in Symphony. A shortcut for accessing EMC is installed on the application server during the installation.

Remote EMC clients allow users to access the EMC from other computers on the network.

1. Open a browser, navigate to
<http://ApplicationServerName:PortNumber/egateway/download/EMCClient/>, and then click **EMCSetup.exe**.
2. If you see the Unknown Publisher warning, click **Run**.
3. On the **Welcome** screen, click **Next**.
4. Set the destination folder, and then click **Next**.
5. Enter the IP address or the name of the Symphony application server with the EGateway port number (for example, <http://192.168.220.224:8080>) , and then click **Next**.
6. Click **Install**.
7. Click **Finish** to exit the installer.
8. Double-click the **AppLoader** icon on the desktop to launch the remote EMC.

The AppLoader also updates the remote EMC with the same versions of files that are on the Symphony application server.

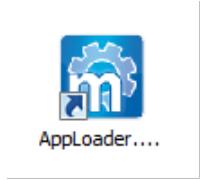


Figure 1-1 AppLoader Icon

After the Symphony Installation

1. Open the EMC from the shortcut on the desktop or **Start** menu.
2. Enter the **Application Server Host Name**:
 - a. If you are launching EMC locally from the server, enter `localhost`.
 - b. If you are accessing the EMC remotely, enter the Server Host Name or IP address of the Symphony application server.
3. Enter your logon credentials, and then click **Login**.
4. Click **OK** for the EMC Database Credentials Non-Compliance message.

If you can launch and see the EMC and the Symphony Gateway is up and running, Symphony is successfully installed.

Post-Upgrade Steps for CAPS on IIS for Simphony 2.9 Users

This section only applies if you are upgrading from the Simphony 2.9 General Release (GR) and are using either an Oracle or Microsoft SQL Server database platform, and are upgrading to Simphony 2.10 or later.

Note: No additional post-upgrade steps are necessary for CAPS on Microsoft Internet Information Services (IIS) if you upgrade from Simphony versions later than Simphony 2.9 GR. For example, Simphony versions 2.9.3, and 2.10 or later.

Perform these steps in IIS after upgrading from Simphony 2.9 GR to the Simphony 2.10 release or later:

Step 1- Close and Post All Transactions

Ensure that all transactions are closed and posted to the Enterprise prior to performing the Simphony upgrade.

Step 2- Access the IIS Manager Console

1. From the desktop of each server running CAPS on IIS, select **Start, Control Panel, Administrative Tools**, and then select **Internet Information Services (IIS) Manager**.
2. From the IIS Connections column, expand the **Sites** folder and right-click on the site created for IIS CAPS and select **Remove**. The name of the IIS CAPS site should be the same as the *ServiceHostName*. For example, if your service host name is *MyIISCapsSvcHost*, your site name should be added using the exact same text.

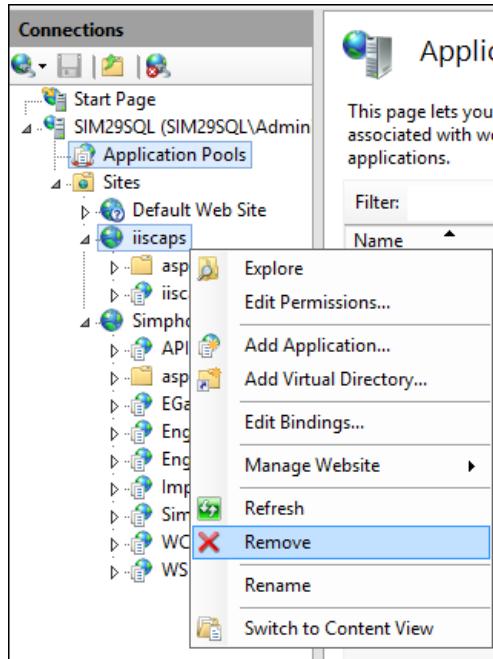


Figure 1-2 IIS CAPS Site

3. From the IIS Connections column, click **Application Pools**.

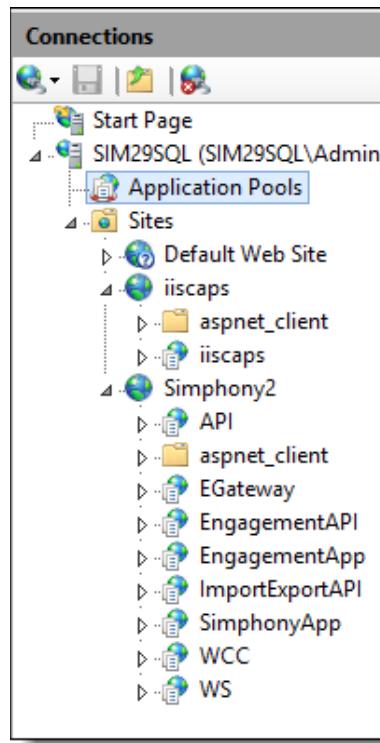


Figure-1-3 Symphony Application Pools

4. Right-click on the application pool created for IIS CAPS and select **Remove**. The name of the IIS CAPS pool should be the *ServiceHostNamePool*. For example, if your service host name is *MyIISCapsSvcHost*, your IIS CAPS application pool name should be *MyIISCapsSvcHostPool*.

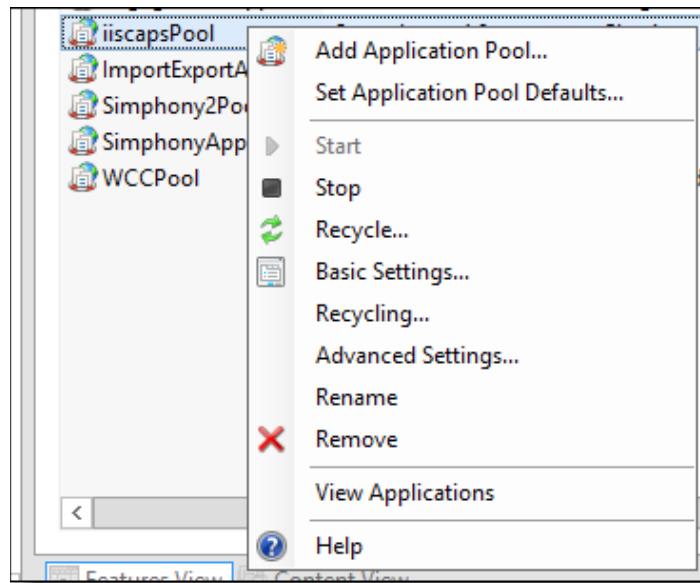
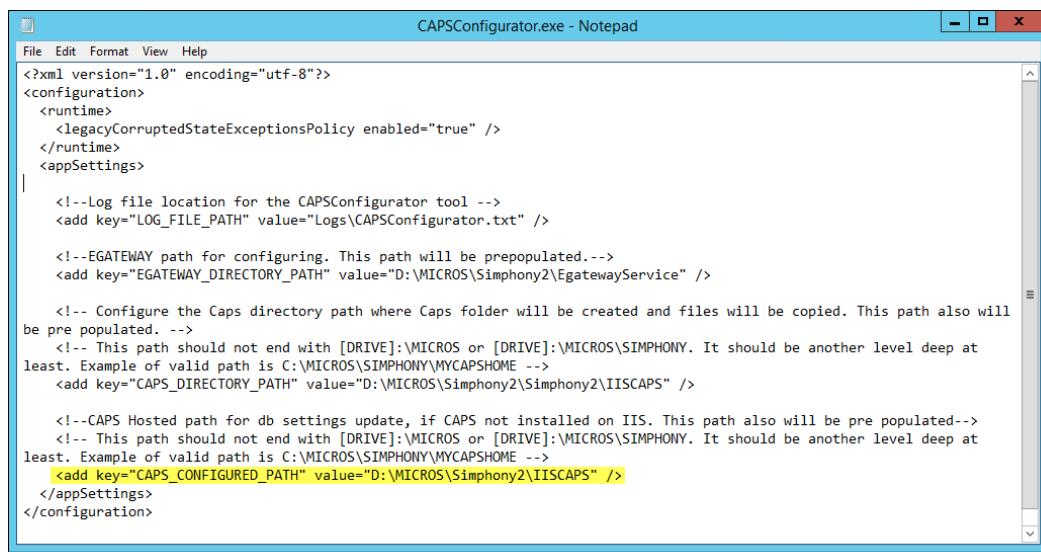


Figure-1-4 IIS CAPS Application Pool

Step 3- Rename the IIS Folder

1. Rename the Symphony version 2.9 IIS CAPS folder.
 - a. Verify the installed folder path by navigating to the **[Drive]:\MICROS\Symphony2\Tools\CAPSConfigurator\CAPSConfigurator.exe.config** file and open it with a text editor such as Microsoft Notepad.

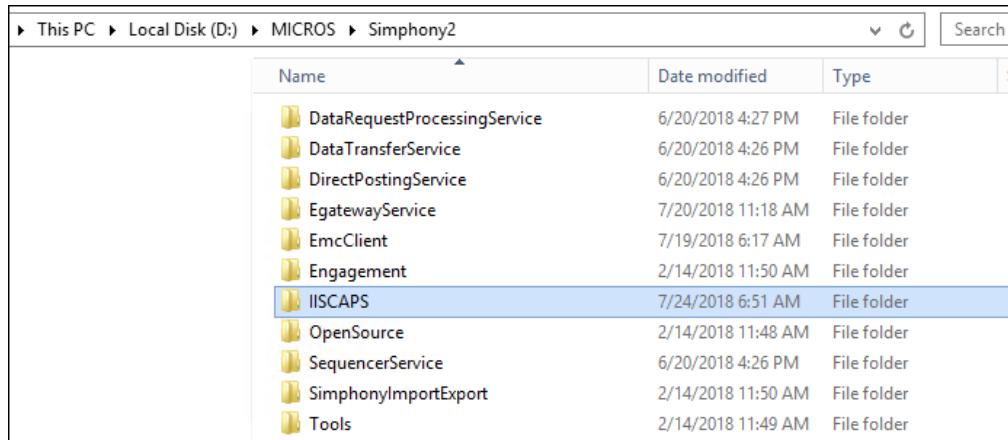


The screenshot shows a Notepad window titled "CAPSConfigurator.exe - Notepad". The content of the file is an XML configuration file for the CAPSConfigurator tool. It includes sections for runtime, appSettings, and configuration. The configuration section contains several `<add key="...>` entries. One entry, `<add key="CAPS_CONFIGURED_PATH" value="D:\MICROS\Symphony2\IISCAPS" />`, is highlighted in yellow, indicating the path to the IIS CAPS folder.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <runtime>
    <legacyCorruptedStateExceptionsPolicy enabled="true" />
  </runtime>
  <appSettings>
    |  <!--Log file location for the CAPSConfigurator tool -->
    |  <add key="LOG_FILE_PATH" value="Logs\CAPSConfigurator.txt" />
    |
    |  <!--EGATEWAY path for configuring. This path will be prepopulated.-->
    |  <add key="EGATEWAY_DIRECTORY_PATH" value="D:\MICROS\Symphony2\EgatetwayService" />
    |
    |  <!-- Configure the Caps directory path where Caps folder will be created and files will be copied. This path also will
    |  be pre populated. -->
    |  <!-- This path should not end with [DRIVE]:\MICROS or [DRIVE]:\MICROS\SIMPHONY. It should be another level deep at
    |  least. Example of valid path is C:\MICROS\SIMPHONY\MYCAPHOME -->
    |  <add key="CAPS_DIRECTORY_PATH" value="D:\MICROS\Symphony2\Symphony2\IISCAPS" />
    |
    |  <!--CAPS Hosted path for db settings update, if CAPS not installed on IIS. This path also will be pre populated-->
    |  <!-- This path should not end with [DRIVE]:\MICROS or [DRIVE]:\MICROS\SIMPHONY. It should be another level deep at
    |  least. Example of valid path is C:\MICROS\SIMPHONY\MYCAPHOME -->
    |  <add key="CAPS_CONFIGURED_PATH" value="D:\MICROS\Symphony2\IISCAPS" />
  </appSettings>
</configuration>
```

Figure-1-5 CAPSConfigurator.exe.config IIS CAPS Directory Installation Folder Path

- b. Note that the default Symphony version 2.9 IIS CAPS folder location is: **[Drive]:\Symphony2\IISCAPS**. Rename the **IISCAPS** folder to **IISCAP_Backup**. This step ensures you maintain a backup of the old folder.



The screenshot shows a Windows File Explorer window with the path "This PC > Local Disk (D:) > MICROS > Symphony2". The "IISCAPS" folder is selected and highlighted in blue. The table below shows the contents of the "Symphony2" folder.

Name	Date modified	Type
DataRequestProcessingService	6/20/2018 4:27 PM	File folder
DataTransferService	6/20/2018 4:26 PM	File folder
DirectPostingService	6/20/2018 4:26 PM	File folder
EgatetwayService	7/20/2018 11:18 AM	File folder
EmcClient	7/19/2018 6:17 AM	File folder
Engagement	2/14/2018 11:50 AM	File folder
IISCAPS	7/24/2018 6:51 AM	File folder
OpenSource	2/14/2018 11:48 AM	File folder
SequencerService	6/20/2018 4:26 PM	File folder
SymphonyImportExport	2/14/2018 11:50 AM	File folder
Tools	2/14/2018 11:49 AM	File folder

Figure-1-6 Default IIS CAPS Folder Installation Path

Step 4- Enable an Option and Configure CAPS

1. Access EMC and navigate to the Enterprise level, click the **Configuration** tab, and then click **Roles**.
2. Click on your assigned Role and toggle to **Form** view. Click on the **Operations** tab, and then click the **Miscellaneous** subtab. Under Miscellaneous Options, enable option **10065 - Download Software, Install and Authenticate Clients and Service Hosts Using CAL and Save**.
3. Logon to the **CAPS Configurator Tool** (using the CAPSConfigurator.exe) and freshly configure CAPS with the default configuration settings by clicking the **Configure CAPS** button. Upon successful installation, verify the new directory created under **[Drive] :\simphony2\EgatewayService\IISCAPSServiceHost** path.

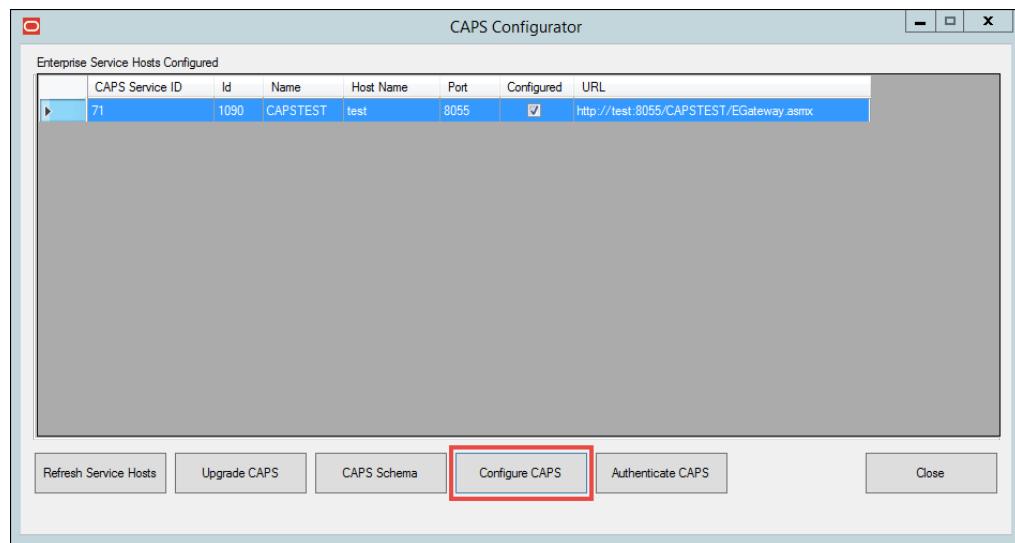


Figure-1-7 CAPS Configurator Tool

Step 5- Stop IIS

Stop IIS by:

1. Run the command window with administrator privileges.
2. Enter the `iisreset /stop` command and press **Enter**.

Step 6- Move the DbSettings.xml to the Newly Defined IIS CAPS Path

1. Copy the **DbSettings.xml** file from the old path (review [Step 3- Rename the IIS Folder](#) above, and verify the default CAPS IIS installation path), and then using Microsoft Windows Explorer, navigate to that path. For example, [Drive]: \Simphony2\IISCAP_Backup\IISCAPS\DbSettings.xml.
2. Paste the **DbSettings.xml** file to the new path: [Drive]:\Simphony2\EgatwayService\IISCAPSServiceHost
3. Edit the **DbSettings.xml** file to update the CAPS database password; this means to delete the previously existing password value on epw (encrypted format) and enter the password again with pwd (ClearText). For example:

```
<root>
  <db
    alias="CPSERVICEdb"
    dbType="sqlserver"
    dataSource="xxxx"
    catalog="xxxxxxxx"
    uid="xxxxxxxxxx"
    pwd="CAPSDBPassword"
    port="1433" />
</root>
```

Step 7- Start IIS

Start IIS by:

1. Run the command window with administrator privileges.
2. Type the `iisreset /start` command and press **Enter**.

Step 8- Verify Log Creation, Database Tables, and Delete the Old Directory

1. Verify that logs are created here: [Drive]:\Simphony2\EgatwayService\IISCAPSServiceHost\EgatwayLog.
2. Verify that the tables are upgraded on the existing transaction database.
3. Delete the Simphony version 2.9 CAPS directory, for example the IISCAP_Backup directory (review [Step 3- Rename the IIS Folder](#) above).

Updating Symphony License Counts

To edit the system's license counts:

1. In the EMC, select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
2. Click the **License Configuration** tab.
3. Click **Configure** adjacent to **Workstations Client License Count**.
4. To add a new license count, select **I would like to set the license count to X, making the new license count X**.
5. To append licenses to an existing license count, select **I would like to add X to the current license count, making the new license count X**.
6. Enter the number of client licenses purchased.
7. (Optional) Enter additional details regarding the purchased license in the **Enter Reference Information for the License Count Change**, and then click **OK**.
8. Repeat Steps 3 through 7 for **Engagement Client License Count**, **Transaction Service Client License Count**, and **KDS Client License Count**.
9. Click **Save**, and then click **Yes** to agree to the license.

To perform a side by side comparison of the number of purchased licenses against the number of configured clients:

Click the **Licensing Configuration** tab, and then click **View** adjacent to the Properties, Revenue Centers, Concessions Terminals, Workstation Client License Count, Engagement Client License Count, Transaction Services Client License Count, or KDS Client License Count labels.

Updating Property Administrator and Database Logon Credentials

When logging in to the EMC for the first time after installing or upgrading to Symphony version 2.9 or later, a message indicates that the property credentials are not compliant with the Symphony standards. To keep the properties safe from security risks, you need to update the Admin and Database credentials, which Symphony uses to create and maintain the workstation databases. Symphony offers the options of configuring security credentials for each property separately or using the same credentials for all properties in the Enterprise. Symphony requires that you update the system and database administrator credentials every 90 days. If you do not update the credentials, EMC shows the Database Credentials Non-Compliance message each time you log in until you comply.

To configure credentials for each non-compliant property separately:

1. In the EMC, select the Enterprise level, click **Setup**, and then click **Properties**.
2. In table view, scroll to the right until you see the Admin Credentials and the Database Credentials columns. If a property is not compliant, the Admin Credentials and the Database Credentials columns are highlighted in red.
3. Click either the **Admin Credentials** or the **Database Credentials** column of a non-compliant property, and the EMC switches to the non-compliant property's **Property Parameters** module.
4. Click the **Security** tab.

5. Enter **User Security Credentials**. Symphony uses these credentials to authenticate the workstations.
The **Install User Security Username** must have at least two characters and must not contain a company name, product name, common words, or Structured Query Language (SQL) keywords (for example, Micros, Oracle, abcd, 1234, and so on).
The Install User Security Password must have a minimum of eight characters and adhere to the Oracle Database standards.
6. Enter the **Current Password** of the Admin User.
7. Enter a new strong password for the Admin User.
See the *Oracle Hospitality Symphony Installation Guide* for more information about password requirements.
8. Repeat Steps 6 and 7 for the Database User, and then click **Save**.
9. Repeat Steps 3 through 8 for all non-compliant properties.

To configure the same credentials for all non-compliant properties in the Enterprise:

1. In the EMC, select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
2. Click the **Security** tab, and then select **Use Same Credentials for All Properties**.
3. Select the property whose credentials you want to use, and then enter the **New Install User Security Password**.
4. Re-enter the new security password in the **Confirm User Security Password** field, and then click **Save**.

Update all Check and Posting Service (CAPS) Clients

See the [Oracle Hospitality Symphony Configuration Guide](#), specifically the *Check and Posting Service (CAPS)* information.

Update or Verify Your CAL Packages

Update or verify your CAL Packages and schedule their deployment to your workstation clients. See *Client Application Loader (CAL)* in the [Oracle Hospitality Symphony Configuration Guide](#) for more information about configuring and deploying CAL Packages.

Setting the Start-Of-Day Sequencer Machine and the App Server Time Zone

1. In the EMC, select the Enterprise level, click the **Setup** tab, and then click **Enterprise Parameters**.
2. Click the **Miscellaneous** tab.
3. Enter the Windows machine name for SOD Sequencer Machine Name.
4. Select the **App Server Time Zone**.
5. If you are deploying Simphony on multiple servers, the date, time, and the time zone settings of each app server and database server must correspond. Additionally, the servers' time zone must correspond with the App Server Time Zone setting in the EMC.
6. (Optional) Synchronize the time settings between the servers by configuring one of the servers to be a Network Time Protocol (NTP) server and then point the rest of the servers to the NTP server. For information on setting up a Network Time Protocol server, refer to the Microsoft TechNet Library at <https://technet.microsoft.com/en-us/> for more information.
7. Click **Save**.
8. If you installed Simphony on multiple application servers, disable the **Micros Sequencer Service** on all servers other than the SOD Sequencer Machine.
9. In the event the application server that is running the Micros Sequencer Service has performance issues, start the Micros Sequencer Service on another Simphony application server if the main application server is going to be down for multiple days.

Connecting Reporting and Analytics to Simphony

With the release of Simphony version 2.10 or later, if you utilize Reporting and Analytics version 9.0 Patch 8, the steps outlined below are no longer required. Core Simphony reports are now available to set up by default from within the Reporting and Analytics application.

If you are utilizing Reporting and Analytics version 8.5.1, the following steps are still applicable.

Before you connect to Reporting and Analytics, you need to have:

- At least one property in the Enterprise. The *Oracle Hospitality Simphony Configuration Guide* contains more information about adding properties to the Enterprise.
- Organizations and report locations created in Reporting and Analytics for your properties in the Enterprise. The *Oracle Hospitality Reporting and Analytics User Guide* contains more information about reporting hierarchies.

To identify the location of Reporting and Analytics on the system, perform the following steps:

1. In the EMC, select the Enterprise level, click the **Setup** tab, click **Enterprise Parameters**, and then click the **mymicros.net** tab.
2. In the **mymicros.net Machine Name** field, enter the name of the computer that is running the MICROS Portal Service.
3. Select the Enterprise level, click the **Setup** tab, and then click **Properties**.
4. Double-click a property to open in form view.
5. Select the **Report Location** for the property. If the Report Location is not available in the drop-down list, click **New**, and then create a Report Location.
6. Complete each field. Here are some recommendations:
 - Use the property name as the **Name**.
 - Use the Property ID as the **Location Reference** (this must be unique).

- Select the **Time Zone** from the drop-down list that matches the property's time zone.
- Enter a user name in the **Simphony Labor Logon** field (this must be unique).
- Enter a password for **Simphony Labor Password** (this must be unique).

7. Click **OK**, and then click **Save**.

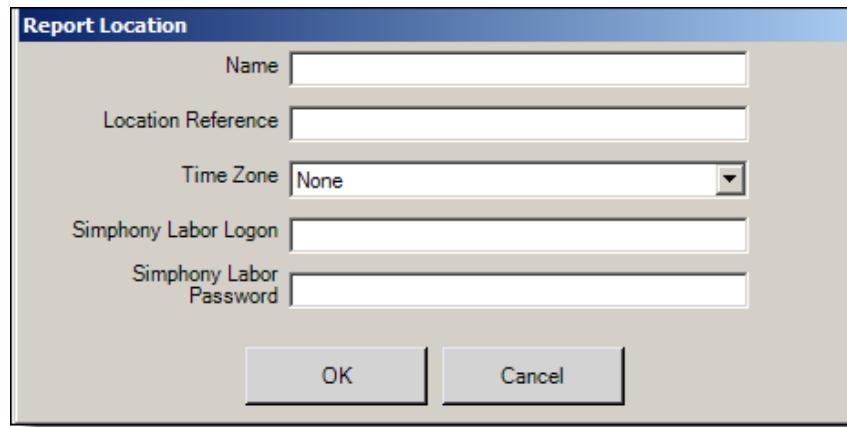


Figure 1-8 Property Report Location

8. Repeat Steps 2 through 6 for all properties in the Enterprise.

Enabling Communication Between the Enterprise and Workstations

To allow workstations in the property to communicate with the Enterprise, you must add Firewall exceptions for the following services on your Simphony application servers using either the default ports or the ports you assign when installing Simphony version 2.10:

- Internet Information Services (IIS): By default uses Transmission Control Protocol (TCP) port 8080
- Client Application Loader (CAL): By default uses TCP port 7300 and User Datagram Protocol (UDP) ports 7300 through 7302
- Oracle Hospitality Labor Management: By default uses TCP port 81

You may need to open extra ports for additional Simphony features. Contact your local support representative or Oracle Hospitality Support Services for assistance.

For instructions on opening a port in Windows Firewall, refer to the Microsoft TechNet Library at <https://technet.microsoft.com/en-us/library>.

2 Troubleshooting

This section describes issues you might encounter when installing or upgrading to Simphony version 2.9 or later, and explains how to solve them.

Adding Simphony to the Windows Firewall Exceptions

The Windows Firewall, which is enabled by default on your operating system, could prevent the Simphony installation application from connecting to the database server. You must set up an exception rule on your firewall setting for the Simphony server and the database server to continue with the installation. For instructions on how to set up exception rules in Windows Firewall, refer to the Microsoft TechNet Library at <https://technet.microsoft.com/en-us/library>.

EMC Fails to Launch

Simphony can fail to install completely because of anti-virus software. Remove anti-virus software from all servers and reinstall Simphony. You can reinstall the anti-virus software after Simphony applications and databases are installed.