Oracle® MICROS Simphony

Location Upgrade Guide

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ORACLE

Oracle MICROS Simphony Location Upgrade Guide, Release 19.5

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Preface

Oracle MICROS Simphony is a cloud-based Point-of-Sale (POS) solution that provides business management capabilities using a single tool with vast integration capabilities to property management systems, paperless kitchen display systems, credit card interfaces, and reporting applications.

Purpose

This guide is for Simphony Cloud Services users and provides post-upgrade steps to perform at your location after an upgrade to your enterprise application server to the latest version of Simphony software.

Audience

This guide is intended for implementation staff, technical support teams, product specialists, and system administrators who are responsible for maintaining the Simphony application.

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

Product documentation is available on the Oracle Help Center at https://docs.oracle.com/en/industries/food-beverage/pos.html.

See the Client Deployment Guide for more information about the Client Application Loader (CAL).

Important:

Starting with the Simphony 19.5 release, Kitchen Display System (KDS) Controllers and Restaurant Display Controllers (RDC) running on Microsoft Windows CE or Microsoft Windows XP are no longer supported. Prior to upgrading to Simphony 19.5, all locations should upgrade their KDS hardware to supported devices. See the Food and Beverage Hardware documentation to determine supported versions of KDS hardware.

Revision History

Date	Description of Change
March 2023	Initial publication for Simphony release 19.5.

1

Handling CAL Packages After the Enterprise is Upgraded

This guide provides a high level overview of the steps which need to be performed at each of your properties and revenue centers after an upgrade of your Simphony enterprise application server to the latest version of software. Going forward, the term **Location**, as used in the steps which follow, represents the properties and revenue centers you are responsible for configuring. Perform each of these post-upgrade tasks to ensure your Simphony workstations, CAPS and CAPS on Internet Information Services (IIS) clients, and Kitchen Display System (KDS) are running the latest version.

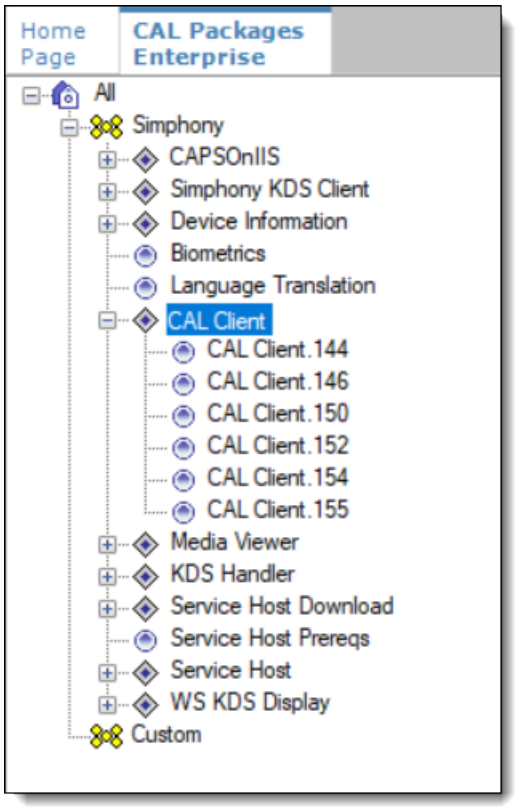
> **Note:**
>
> Once the upgrade to your Simphony enterprise application server has been completed, and prior to your location's planned upgrade, all CAL packages can be scheduled (via the **Effective From** and **Effective To** settings) to download to workstations or other devices from the **CAL Packages** module in the Simphony EMC.

Follow the steps outlined in Chapter 1 of this document for individual locations, but if you are maintaining multiple locations for an enterprise, you can change CAL package versions using the **Change Package Version** link as described in Chapter 2 of the Client Deployment Guide in the *Changing a CAL Package Version* topic.

Stop Deploying the Current Version

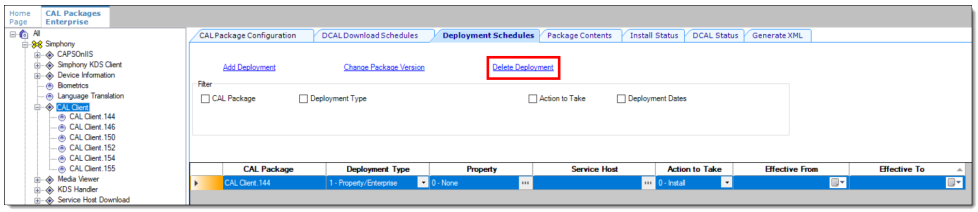
1. Sign in to the Enterprise Management Console (EMC).
2. Click the Enterprise, **Setup** tab, and then **CAL Packages**.
3. Select the **CAL Client** packages from the CAL packages tree.

Figure 1-1 CAL Packages Tree



4. Click the **Deployment Schedules** tab.
5. Delete the existing CAL package deployments by selecting the deployment record, and then click the **Delete Deployment** link.

Figure 1-2 CAL Packages Deployment Schedules Tab



a. Repeat this step for each of the following types of CAL packages listed in the CAL packages tree:
   - Service Host Download
   - Service Host Prereqs
   - Service Host

b. For users of a Kitchen Display System (KDS), delete the following CAL package deployments listed in the CAL packages tree:
   - Simphony KDS Client

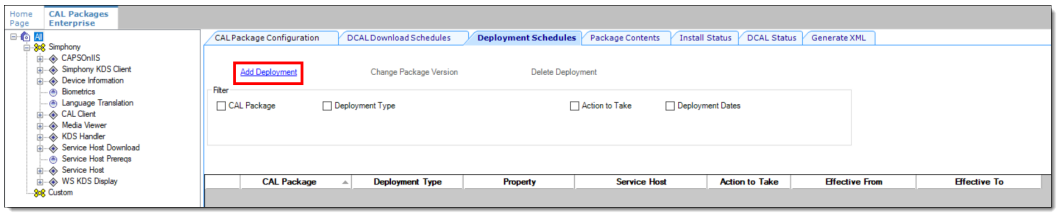
- KDS Handler
- WS KDS Display

6. Click **Save**.

Send New CAL Client Package to All Devices

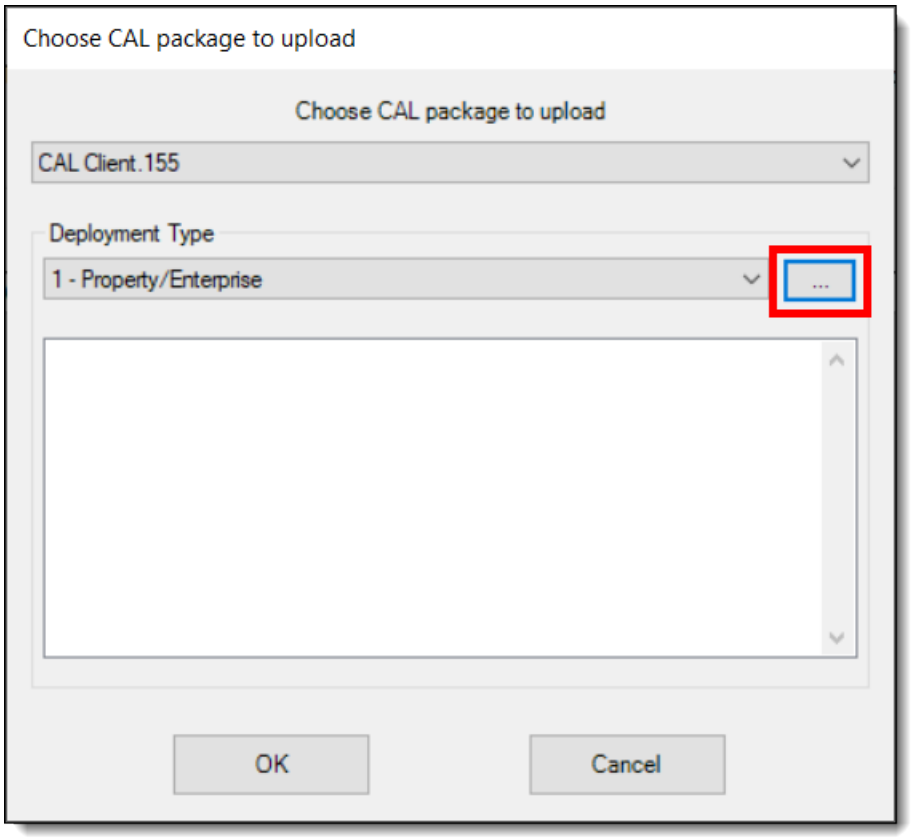
1. Sign in to EMC.
2. Click the Enterprise, **Setup** tab, and then **CAL Packages**.
3. Select **All** from the CAL packages tree.
4. Click the **Deployment Schedules** tab.
5. Click the **Add Deployment** link.

Figure 1-3 CAL Packages Deployment Schedules Tab



6. Click the down arrow under **Choose CAL Packages to upload** to access the drop-down list, select **CAL Client.xxx**, and then select [file name] for the version of Simphony you are upgrading to. The (xxx) refers to the version number.

Figure 1-4 CAL Package to Upload Window



7. With the **Deployment Type** set to the default setting of **1 - Property/Enterprise**, click the ellipsis '**...**' adjacent to the drop-down list.
8. Select your property from the list, and then click **OK** to close the Select Properties list. Click **OK** again to close the CAL package selection window.
9. Verify the **Action to Take** column shows **Install**, and then click **Save**.

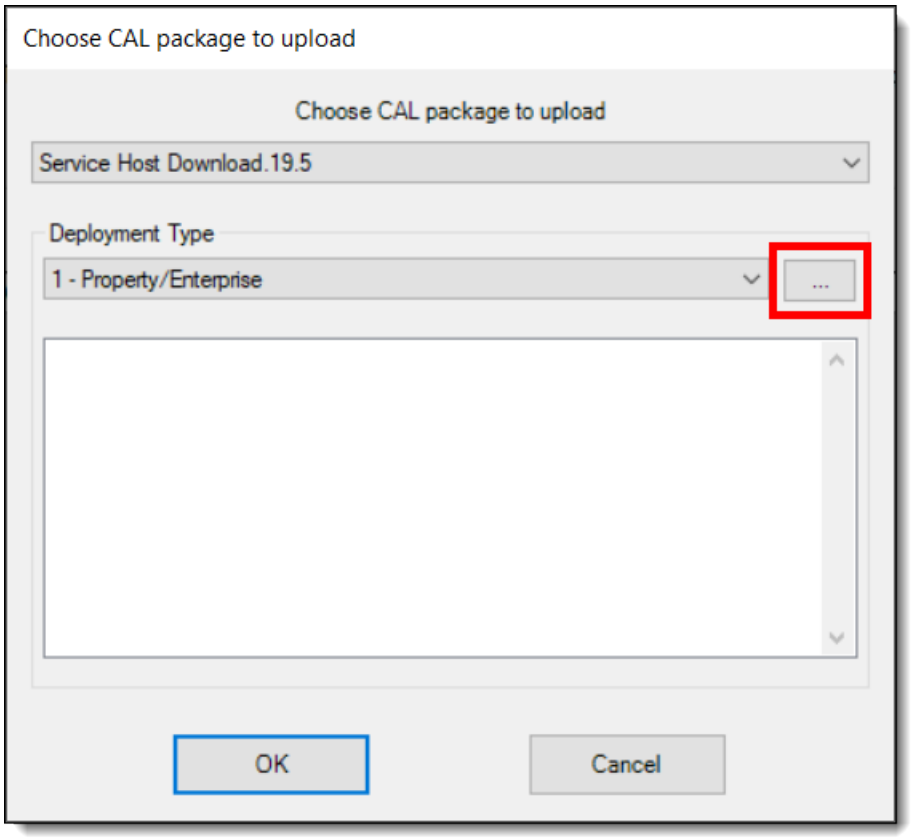
   Your workstations should begin receiving the CAL client updates.

   See Adding a Deployment Schedule for One CAL Package for more information.

Send Service Host Download Packages to All Devices

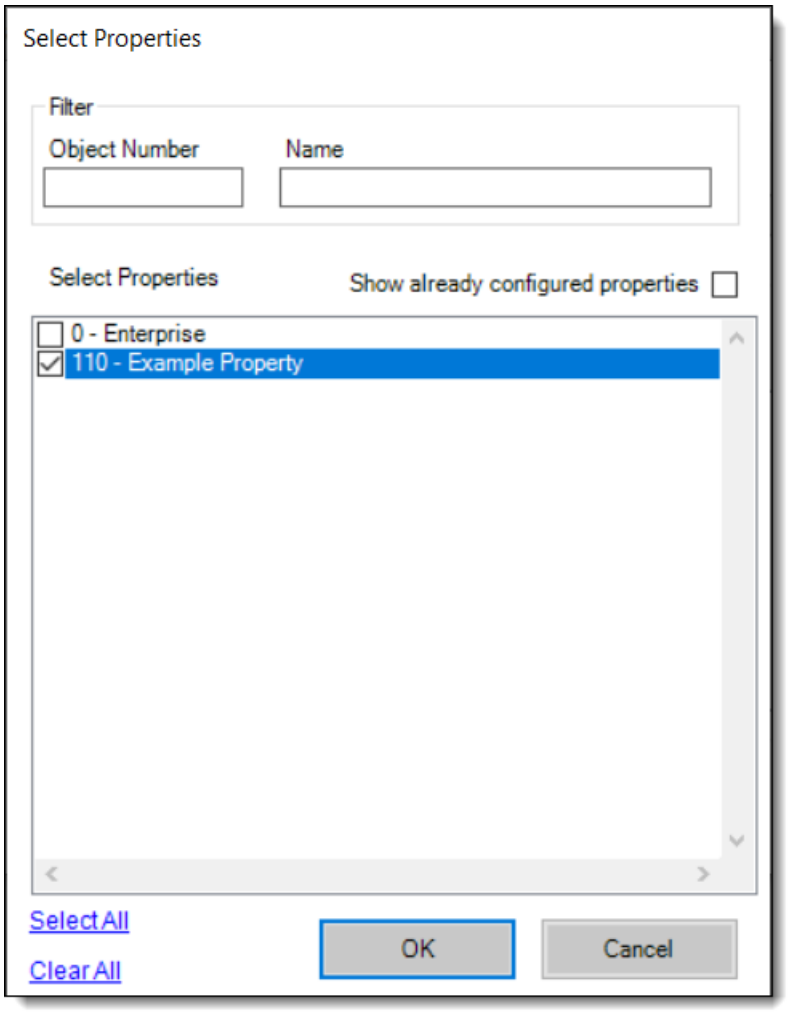
1. Sign in to EMC.
2. Click the Enterprise, **Setup** tab, and then **CAL Packages**.
3. Select **All** from the CAL packages tree.
4. Click the **Deployment Schedules** tab.
5. Click the **Add Deployment** link.
6. Click the down arrow under **Choose CAL Packages to upload** to access the drop-down list, select **Service Host Download x.x.x**, and then select [file name] for the version of Simphony you are upgrading to. The (xxx) refers to the version number.

Figure 1-5 CAL Packages Add Service Host Download Deployment



7. With the **Deployment Type** set to the default setting of **1 - Property/Enterprise**, click the ellipsis '**…**' adjacent to the drop-down list.
8. Select your property from the list, and then click **OK** to close the Select Properties list. Click **OK** again to close the CAL package selection window.

Figure 1-6 CAL Packages Service Host Select Properties Window



9. (Optional) If you want to schedule the download of Service Host packages, configure the **Effective From** and **Effective To** date columns.
10. Verify the **Action to Take** column shows **Install**, and then click **Save**.

    Your workstations should begin receiving the Service Host updates (or at the scheduled time).

> **Note:**
>
> Workstations restart multiple times while upgrading. Allow the upgrade to run uninterrupted until completed. If you see a **failed** message during the deployment, stop and troubleshoot immediately.

Send KDS Handler Package to KDS Controllers

1. Sign in to EMC.
2. Click the Enterprise, **Setup** tab, and then **CAL Packages**.

3. Select **All** from the CAL packages tree.
4. Click the **Deployment Schedules** tab.
5. Click the **Add Deployment** option.
6. Click the down arrow under **Choose CAL Packages to upload** to access the drop-down list, select **KDS Handler x.x.x**, and then select [file name] for the version of Simphony you are upgrading to. The (xxx) refers to the version number.
7. Ensure the **Deployment Type** is set to **2 - Specific Service Host** from the drop-down list, and then click the ellipsis '**…**' adjacent to the same setting.
8. Select the workstation or server which is defined as the KDS Controller for your property, and then click **OK** to close the Select Specific Service Host list. Click **OK** again to close the CAL package selection window.
9. Verify the **Action to Take** column shows **Install**, and then click **Save**.

   Your workstations or server should begin receiving the KDS Controller update (or at the scheduled time).
10. If you have a backup KDS Controller, repeat all of the previous steps for that device.

Send WS KDS Display Package to KDS Displays

1. Sign in to EMC.
2. Click the Enterprise, **Setup** tab, and then **CAL Packages**.
3. Select **All** from the CAL packages tree.
4. Click the **Deployment Schedules** tab.
5. Click the **Add Deployment** option.
6. Click the down arrow under **Choose CAL Packages to upload** to access the drop-down list, select **WS KDS Display x.x.x**, and then select [file name] for the version of Simphony you are upgrading to. The (xxx) refers to the version number.
7. With the **Deployment Type** set to the default setting of **1 - Property/Enterprise**, click the ellipsis '**…**' adjacent to the drop-down list.
8. Select your property from the list, and then click **OK** to close the Select Properties list. Click **OK** again to close the CAL package selection window.
9. Verify the **Action to Take** column shows **Install**, and then click **Save**.

   Your KDS Displays should begin receiving the KDS Display update (or at the scheduled time).

How to Validate Workstation and KDS Display Upgrades

After completing the upgrade steps, ensure the upgrade completed properly by verifying the client version, and all workstations and order devices are online and posting.

1. Sign in to the workstation.
2. Navigate to the screen where the **Launch PMC** function is available and then select the button.
3. Verify that the version shows **x.x.x** for the version of Simphony you upgraded to. The (xxx) refers to the version number.

4. Verify that the **Check and Posting Status** shows as **Online**.
5. Verify that the **Database Sync Status** shows as **Online**.
6. Test all POS operations by beginning new transactions, and then:
   - Verify all service totaled or closed checks are sent to the correct order devices (including KDS displays) in the kitchen or bar.
   - Verify all guest checks or customer receipts print as expected (depending on how the order was begun).
   - Ensure you can perform credit authorizations and close the checks.
   - Verify that reports reflect the sales totals from your test transactions.
   - Ensure your interfaces and integrations are working as expected. For users of Property Management System (PMS) interfaces, such as Oracle Hospitality OPERA, perform a room inquiry and room charge.
7. Sign in to EMC.
8. Click the Enterprise, **Setup** tab, **CAL Packages**, and then the **Install Status** tab. From here you can search for and review details about the status of each deployed CAL package.

   See Viewing the CAL Package Download Status for more information about the Install Status tab.

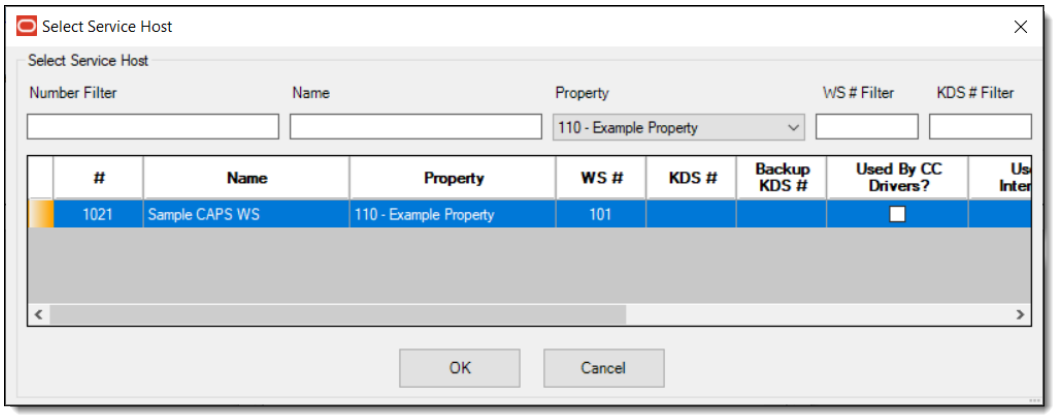
Send Service Host Download to CAPS Devices

If you are using a Check and Posting Service (CAPS) or CAPS on IIS configuration, see the following topics for more detailed information.

For CAPS Workstations

1. Sign in to EMC.
2. Click the Enterprise, **Setup** tab, and then **CAL Packages**.
3. Select **All** from the CAL packages tree.
4. Click the **Deployment Schedules** tab.
5. Click the **Add Deployment** option.
6. Click the down arrow under **Choose CAL Packages to upload** to access the drop-down list, select **CAL Client.x.x.x**, and then select [file name] for the version of Simphony you are upgrading to. The (xxx) refers to the version number.
7. Set the **Deployment Type** to **2 - Specific Service Host** from the drop-down list, and then click the ellipsis '**...**' adjacent to the **Deployment Type** drop-down list.
8. Select the **Check and Posting Service (CAPS)** workstation for your property, and then click **OK** to close the Select Specific Service Host list. Click **OK** again to close the CAL package selection window.

Figure 1-7 CAL Packages Add Deployment for a Specific Service Host for CAPS Workstations



9. Verify the **Action to Take** column shows **Install**, and then click **Save**.

   Your CAPS workstation should begin receiving the CAL Client updates (or at the scheduled time).

> **Note:**
>
> The CAPS workstation restarts multiple times while upgrading. Allow the upgrade to run uninterrupted until completed. If you see a **failed** message during the deployment, stop and troubleshoot immediately. If you see a message showing **Local Db Max Size**, press **OK**. You can ignore this message for now, but it is recommended you check the free space on the hard drive of the CAPS workstation after the upgrade is complete.

See Check and Posting Service (CAPS) in the *Oracle MICROS Simphony Configuration Guide* for more information.

For CAPS on IIS Workstations

> **Important:**
>
> The following steps are only required if your location has configured a CAPS on Internet Information Services (IIS) workstation.

1. Sign in to EMC.
2. Click the Enterprise, **Setup** tab, and then **CAL Packages**.
3. Select **All** from the CAL packages tree.
4. Click the **Deployment Schedules** tab.
5. Click the **Add Deployment** option.

6. Click the down arrow under **Choose CAL Packages to upload** to access the drop-down list, select **CAPSOnIIS x.x.x**, and then select [file name] for the version of Simphony you are upgrading to. The (xxx) refers to the version number.
7. Ensure the **Deployment Type** is set to **2 - Specific Service Host** from the drop-down list, and then click the ellipsis '**...**' adjacent to the **Deployment Type** drop-down list.
8. Select the CAPSonIIS workstation client for your property, and then click **OK** to close the Select Specific Service Host list. Click **OK** again to close CAL package selection window.
9. Verify the **Action to Take** column shows **Install**, and then click **Save**.

   Your CAPS on IIS workstation should begin receiving the CAPSOnIIS updates (or at the scheduled time).

> **Note:**
>
> The CAPS on IIS workstation restarts multiple times while upgrading. Allow the upgrade to run uninterrupted until completed. If you see a **failed** message during the deployment, stop and troubleshoot immediately. If you see a message showing **Local Db Max Size**, press **OK**. You can ignore this message for now, but it is recommended you check the free space on the hard drive of the CAPS on IIS workstation after the upgrade is complete.

10. Once the update has completed, browse to `[Drive letter]:\Micros\Simphony2\CAPSOnIIS\Tools\CAPSConfigurator` on the CAPS on IIS workstation.
11. Double-tap the **CAPSConfigurator**, and enter the server and port number of the EGateway, and then sign in using your EMC credentials. A list of Service Hosts appears.
12. Select the Service Host to be upgraded, and then select **Upgrade CAPS**.

    See CAPS Configuration Tool for more information.
13. To validate that the CAPSonIIS configuration is successful:
    a. Sign in to EMC.
    b. Select the Enterprise, click **Setup**, **CAL Packages**, and then click the **Install Status** tab.

    See Check and Posting Service (CAPS) in the *Oracle MICROS Simphony Configuration Guide* for more information.

2 Troubleshooting

Here is a list of the Simphony system's log files and their location. If necessary, access the log files and review them for troubleshooting purposes.

Table 2-1 Log File Locations

Log Files	Log File Location Paths
EMC log folder	`C:\Program Files\Oracle Hospitality\EMCClient\log`
Workstation Simphony Ops log	`C:\Micros\Simphony\WebServer\wwwroot\EGateway\EGatewayLog`
Workstation CAL Package log	`C:\Micros\Simphony\CALTemp\Packages\[package_name]\Setup_log.txt`
CAPS on IIS Service Host log	`<Drive letter>:\Micros\Simphony\IISCAPSServiceHost\EGatewayLog` on the Service Host.
Android Workstation log	Can be accessed using the Property Management Console (PMC) by privileged staff.
Oracle Linux for MICROS Workstation log	If you can start operations on the device, log files can be accessed using the EMC or PMC by privileged staff here: `/opt/oracle/simphony/WebServer/wwwroot/EGateway/EGatewayLog`