Oracle® Simphony
Frontline Manager User Guide

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Oracle Simphony Frontline Manager User Guide, Release 19.7

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Preface

Oracle MICROS Simphony Frontline Manager is a web application used to view and change settings for the Oracle MICROS Simphony solution.

Purpose

Oracle MICROS Simphony Frontline Manager provides a suite of intuitive configuration tools to simplify managing your restaurant.

Audience

This document is intended for all users of Oracle MICROS Simphony Frontline Manager. More specifically, Frontline Manager is a tool intended for restaurant managers to quickly make changes to menu items.

Customer Support

To contact Oracle Customer Support, access the Customer Support Portal at:

https://iccp.custhelp.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.

Simphony eLearning

The Simphony Learning Subscription provides additional product knowledge through interactive training, guided video tours, and helpful knowledge checks. After exploring the documentation library, use your Oracle Single Sign On to check out the Simphony learning opportunities at Hospitality Learning Subscriptions.

Revision History

Date	Description of Change
September 2024	Initial publication.

1

Getting Started

You can access Frontline Manager from Oracle MICROS Simphony Home. To access Simphony Home, use the URL that was provided by Oracle.

To sign in to Simphony Home, enter your **Email** or **User Name**, **Enterprise Name**, and **Password**, and then click **Sign In**.

If you have forgotten the password, click **Can't Sign In** to initiate an email with a time expiration link that allows you to set a new password.

To sign out of Simphony Home, click **Logout**.

Enable Frontline Manager Access Privileges

To access Frontline Manager (FLM), users must first have the privileges enabled for them from the Oracle MICROS Simphony Enterprise Management Console (EMC). See **Configuring Permissions for the EMC** in the *Oracle MICROS Simphony Configuration Guide* for more information.

FLM is a web application which uses the Oracle MICROS Simphony Configuration and Content API to access the Simphony database. See the Oracle MICROS Simphony Configuration and Content API Guide for more information.

To assign FLM privileges:

1. Sign in to the Simphony EMC.

2. Select the **Enterprise**, click **Configuration**, and then click **Roles**.

3. Double-click the record of the role for which to set user permissions (for example, Manager).

4. Click the **FLM Modules** tab.

Figure 1-1   FLM Modules Tab in Simphony EMC Roles Module
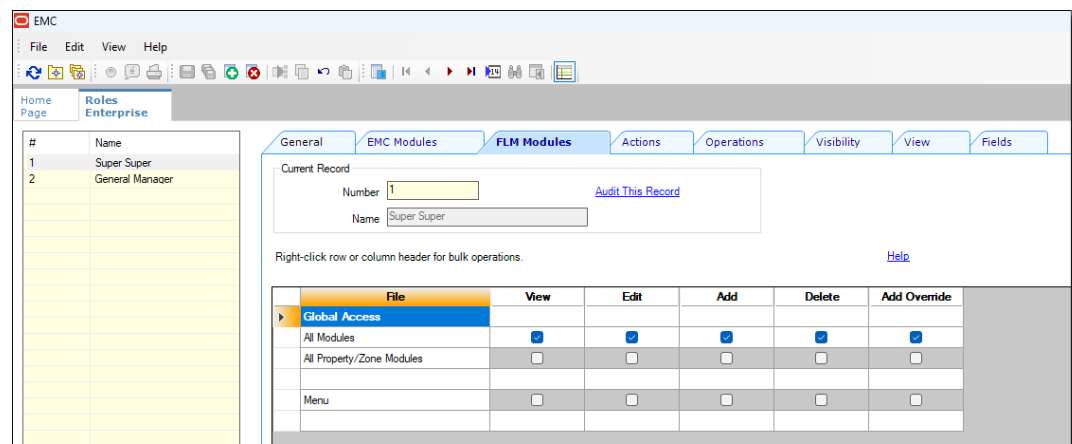
5.   Assign the appropriate access privileges for the role.

6.   Click **Save**.

7.   Assign the role to specific users from Oracle MICROS People Management.

     See the **People Management** chapter in the *Oracle MICROS Reporting and Analytics User Guide* for more information about configuring employees.

Sign In

1.   To access Frontline Manager (FLM), navigate to Simphony Home, and then enter your credentials.

Figure 1-2   Simphony Home Sign In Page
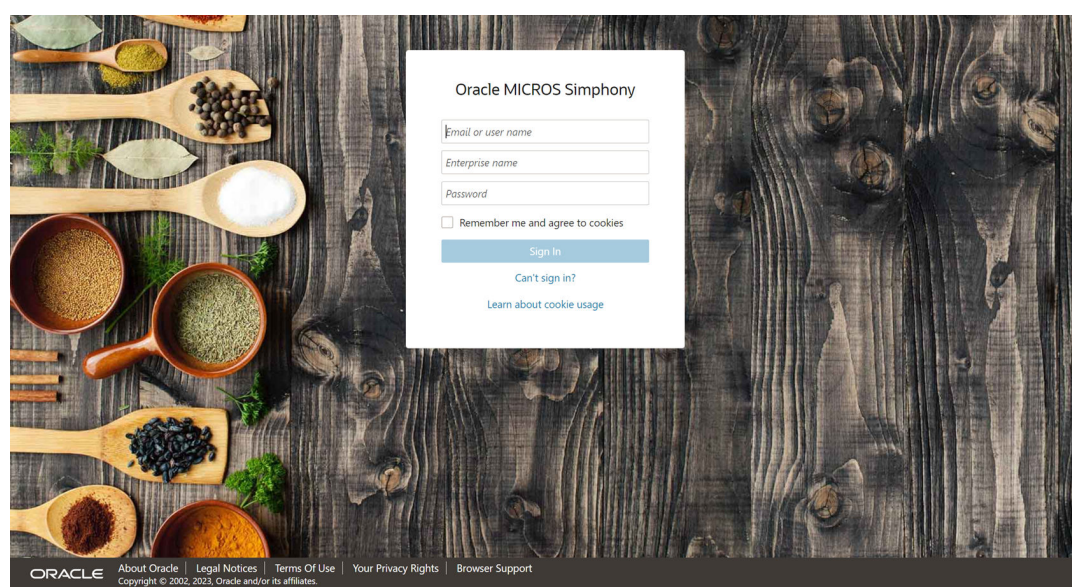
2.   To open FLM, click the application navigation icon

     at the top left of the Simphony Reports page.

Figure 1-3   Simphony Reports Page
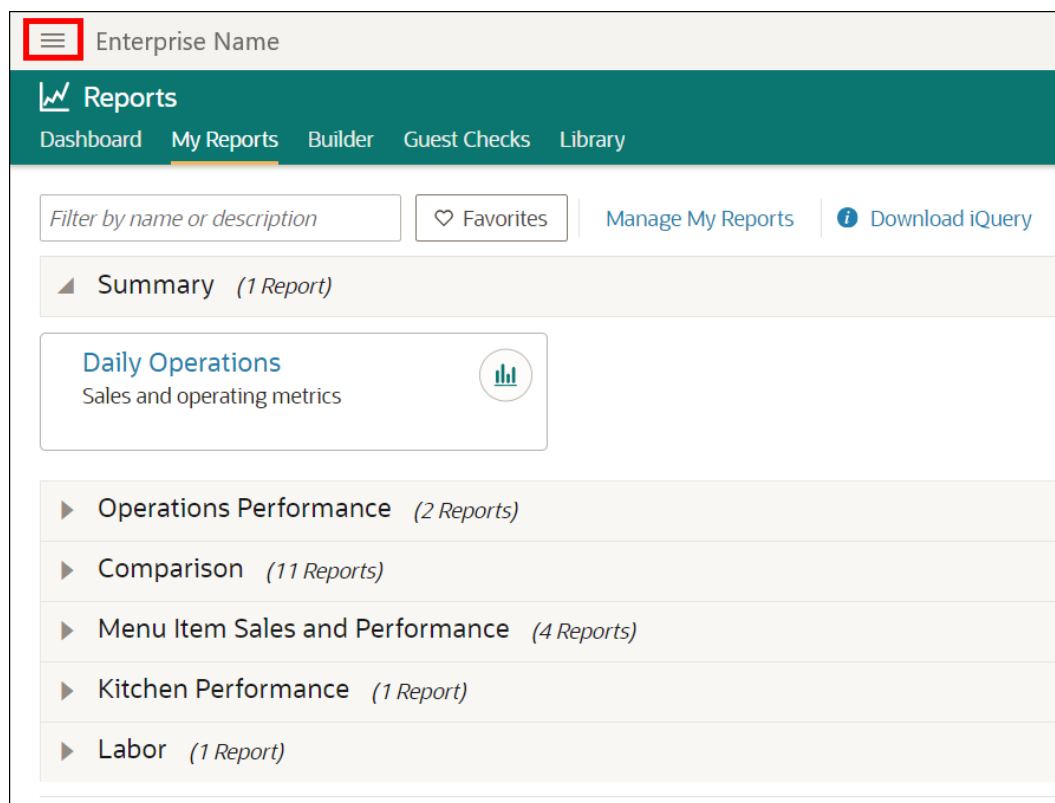
3. Select **Frontline Manager** in the side menu.

Figure 1-4   Side Menu Access to Frontline Manager
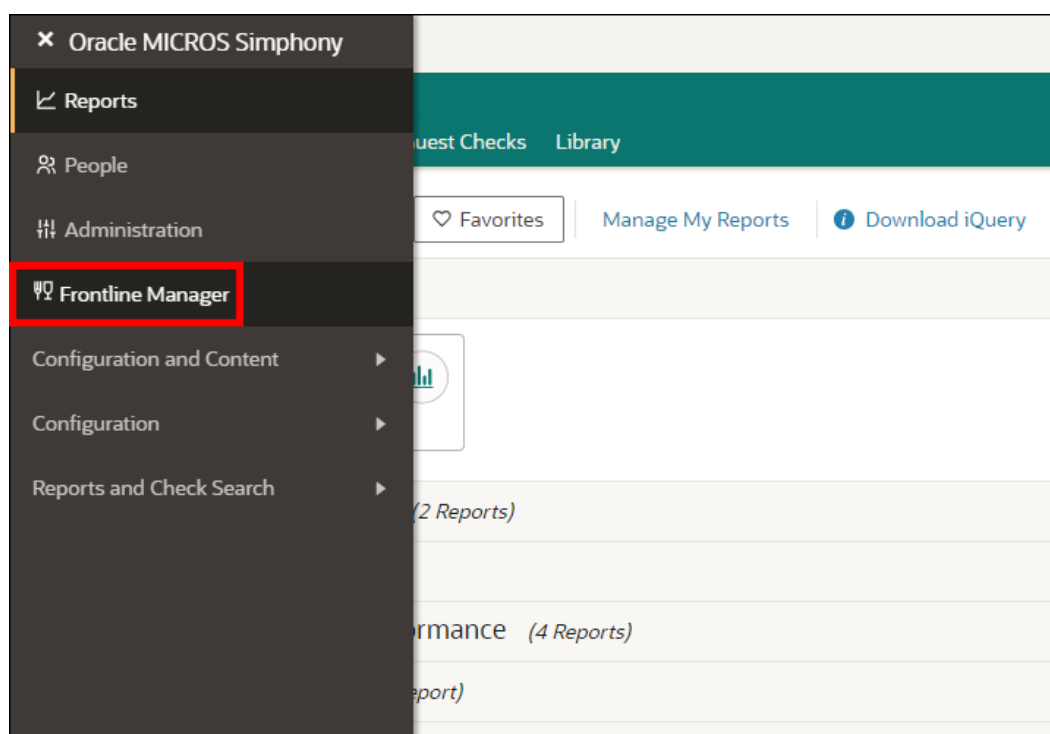
FLM opens to the Welcome page. The Welcome banner appears when users sign in to FLM for the first time.

> **✎ Note:**
>
> If a user clears the computer's cache of cookies (or Microsoft Windows clears them after 90 days), the Welcome banner appears again for each user when signing in to FLM.

Figure 1-5   Frontline Manager Welcome Banner
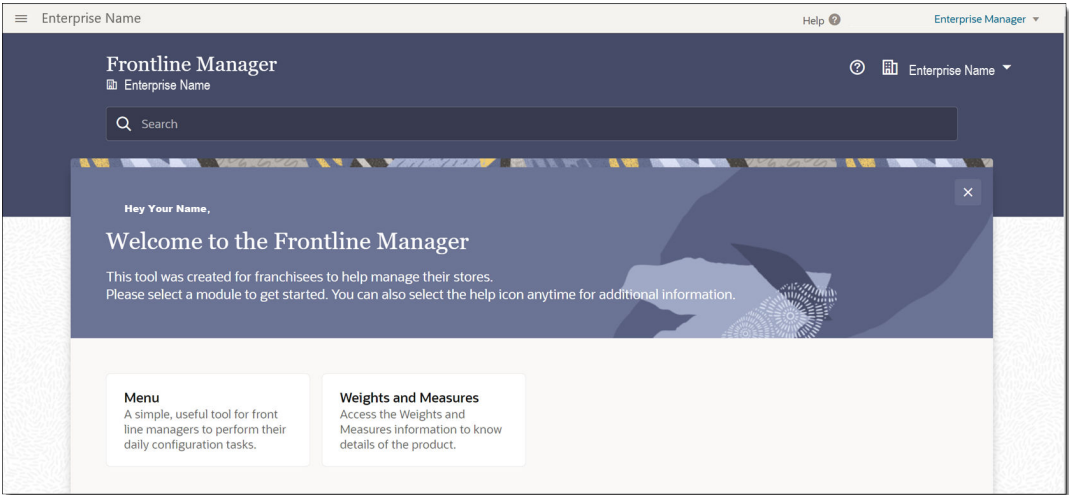
Frontline Manager Home Page

After you sign in, the Frontline Manager (FLM) Home page appears. The Home page has several fields and links where users can sign out, navigate to another location, or use a search filter.

Figure 1-6   FLM Home Page
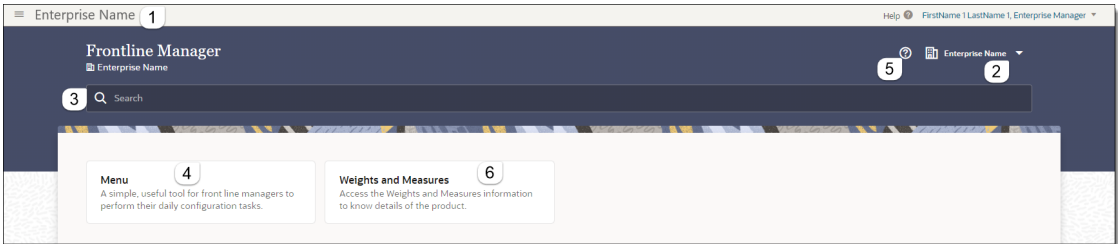
The following table describes the areas called out in the image.

Table 1-1   FLM Home Page

Callout Number	Area	What You Use It For
1	Enterprise Indicator	Indicates to which organization the user is signed in.
2	Scope Selector	Shows the currently selected level in the hierarchy. Click the drop-down arrow to change the scope (or view) between the enterprise, locations, zones, or revenue centers.
		The System View is the default view and shows the hierarchy of locations starting with the enterprise.
3	Search	Enter text to search for a specific module.
4	Menu	Click this tile to access your menu items.
5	Help	Click the help link to access the Oracle Help Center for online FLM documentation.
6	Weights and Measures	Click this tile to review the Oracle MICROS Simphony software version and the National Type Evaluation Program (NTEP) Certificate of Conformance (CC) number, which complies with the United States Department of Agriculture Weights and Measures labeling requirement.

2

Scope Selector

The **Scope Selector** allows you to quickly change the view of your organization's hierarchy (that is, enterprise, locations, revenue centers, and zones). By selecting a scope, you are limiting the configuration changes you can make in each FLM module. For example, menu item price changes made at a location are inherited by the revenue centers associated with it.

Scope Selector consists of three views:

1. **Recent**: The Recent view contains a list showing the hierarchy level and module's name (for example, Menu Item Price) where you recently saved a change in FLM.

2. **System View**: The System View is the default view when you open the scope selector, and it shows the Enterprise name and associated locations.

3. **Zones**: Zones are custom hierarchies used to manage groups of locations and revenue centers within an organization. Zones may contain sub-zones and a single revenue center or a location can belong to multiple zones.

The **System View** contains the hierarchies to which you have been assigned access privileges in Simphony. There are three hierarchies in the system view:

- **Enterprise**: The top administrative level of your organization.

- **Location**: Identifies the physical property where restaurants within your organization are assigned and listed within an Enterprise. Typically a manager only has access to one location, while a regional manager may have multiple locations in their system view.

- **Revenue Center**: Revenue centers are defined within an organization for sales tracking and accounting. Typically a revenue center matches an outlet within the location, such as a restaurant, bar, or retail outlet.

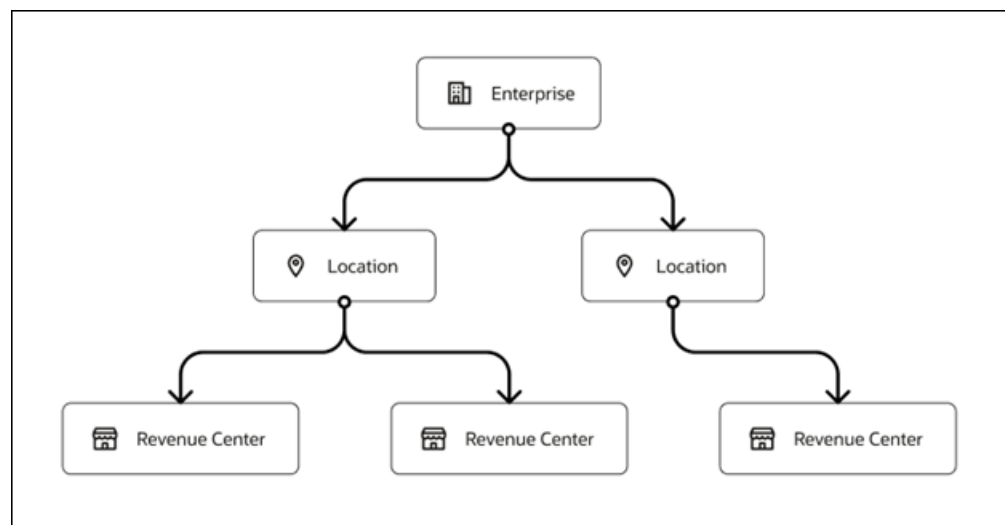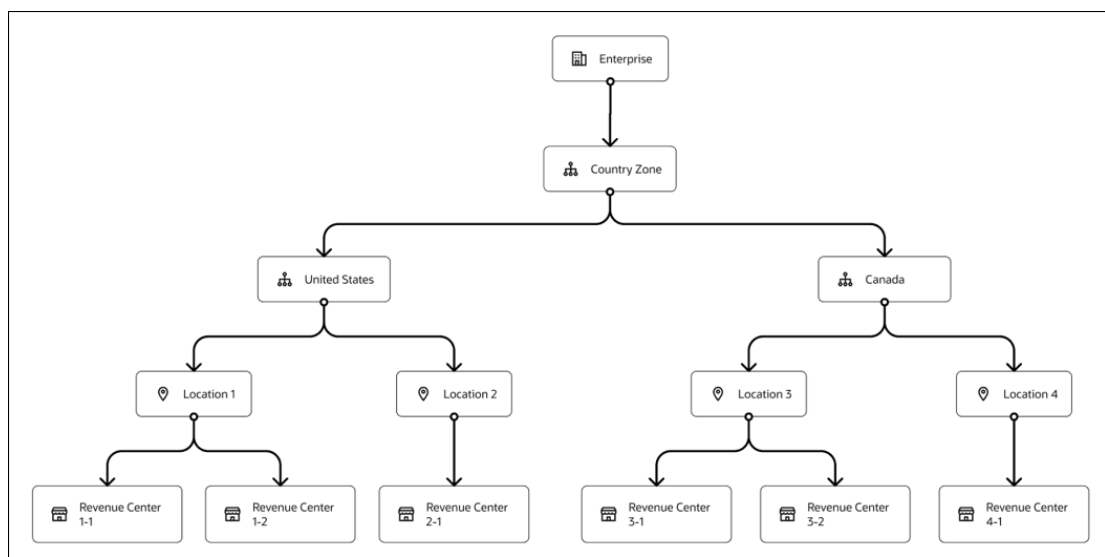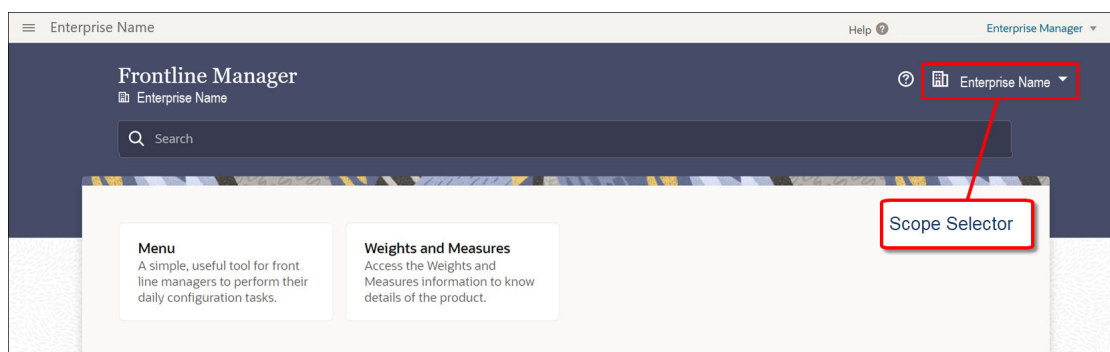**Figure 2-1   Organization Hierarchy**

Figure 2-2   Example Hierarchy with Zones

After signing in to Frontline Manager (FLM), you can switch the view by clicking on the Scope Selector's drop-down arrow icon as shown in the following figure.

Figure 2-3   Scope Selector on FLM Home Page

When the **Show object number** checkbox is disabled, the Select Scope dialog lists the names of the enterprise, locations, zones, and revenue centers.

When the **Show object number** checkbox is enabled, locations are listed in alphabetical order beneath the enterprise along with drop-down arrows so you can navigate to each assigned revenue center. The Search field is active and you can enter the name of a location or revenue center.

Figure 2-4   Scope Selector - Default System View

Figure 2-5   Scope Selector - Expanded System View

Figure 2-6   Scope Selector - Zones View

Figure 2-7   Scope Selector - Zones View with Show Object Names Enabled
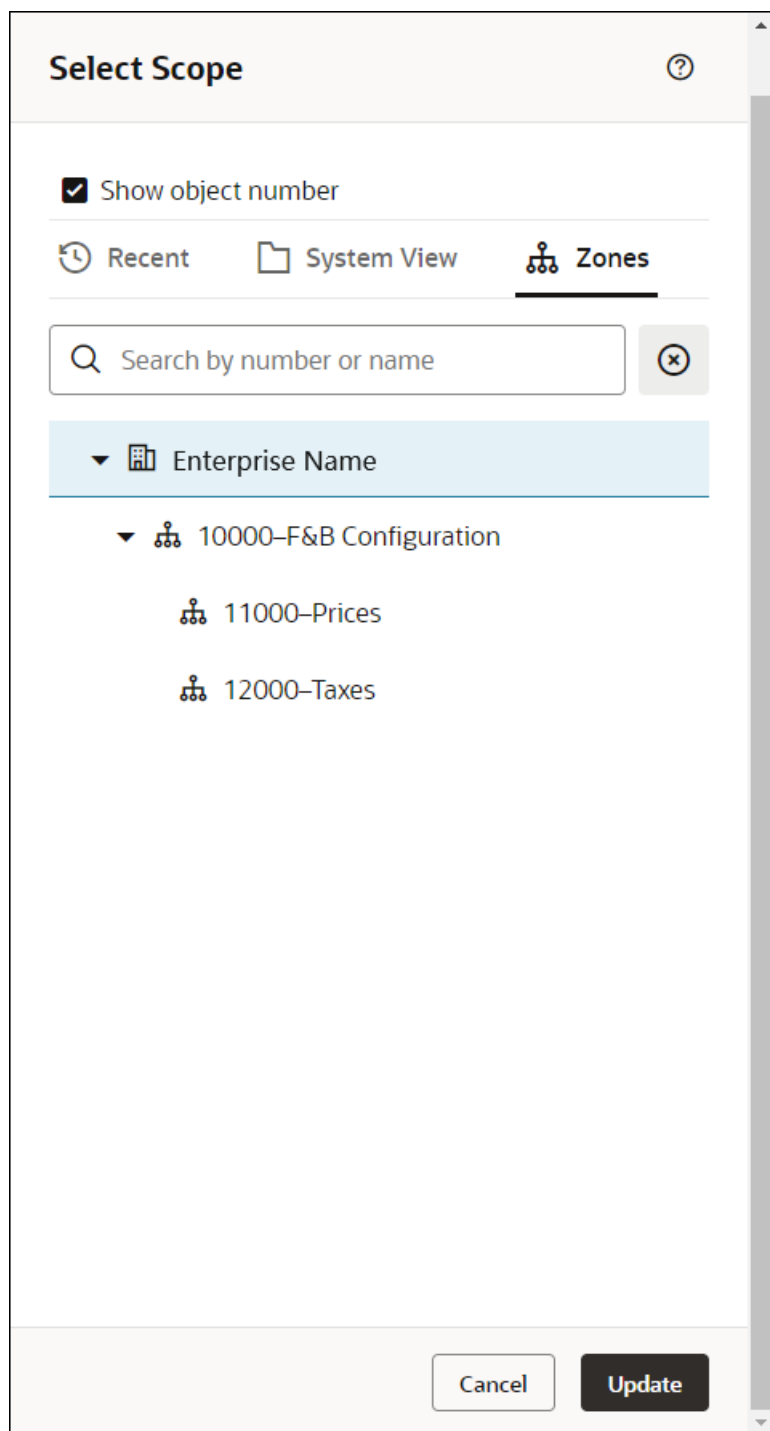
After selecting a location, click **Update**. The name of the location appears on the FLM Home page adjacent to the Scope Selector drop-down arrow.

3

Menu Items

The Menu module allows you to manage menu items which could be sold in your restaurant. When working with menu items in FLM, you can change the filter between regular menu items and condiments by clicking the **Type** drop-down list as shown on the following figures.

Once a **Type** selection has been made, you can look for regular or condiment menu items by entering the item's name in the **Search** bar.

Figure 3-1   Regular Type
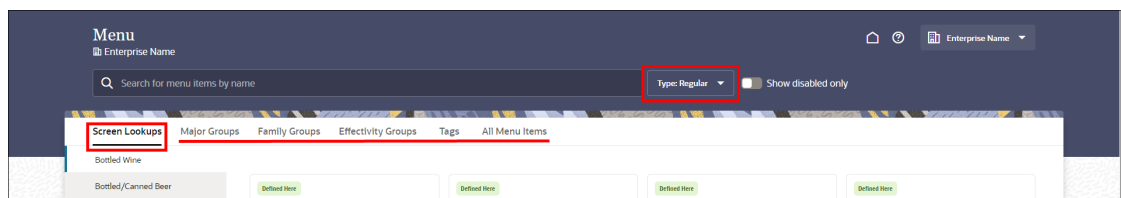
Figure 3-2   Condiment Type
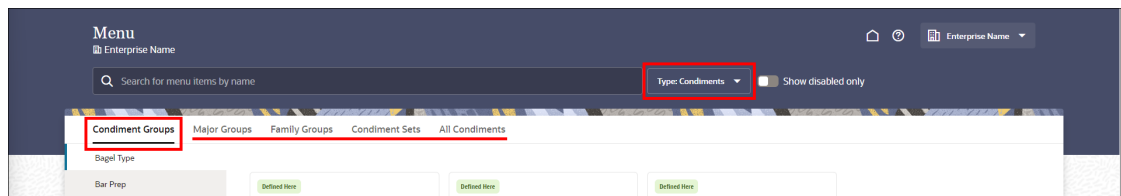
Depending on the menu item **Type** selected, you can filter the view further by clicking the following tabs:

- Screen Lookups (regular menu items only)
- Major Groups (both types)
- Family Groups (both types)
- Effectivity Groups (regular menu items only)
- Tags (regular menu items only)
- All Menu Items (regular menu items only)
- Condiment Groups (condiments only)
- Condiment Sets (condiments only)
- All Condiments (condiments only)

To view disabled menu items, click **Show disabled only**. The following figure shows the disabled item when the **All Menu Items** tab is selected. In the sample figure, only the Ahi Tuna Steak is disabled.

Figure 3-3   Regular Menu Item Filter with Show Disabled Only
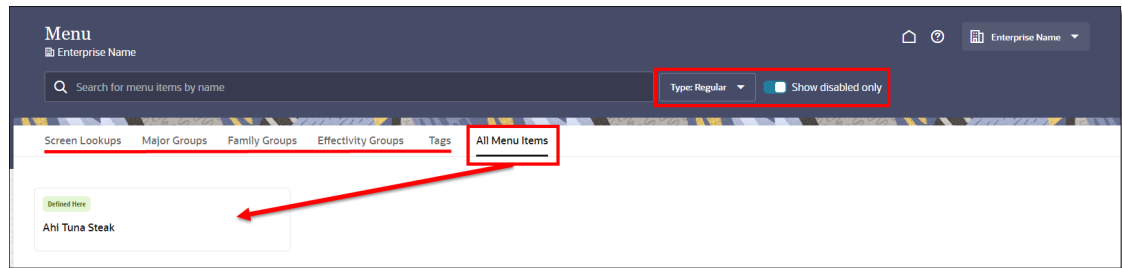
If there are no disabled menu items (based on the tab selected), the following message appears: "You don't have menu items associated with the selected screen lookup." The following image shows the message when the **Screen Lookups** tab is selected.

Figure 3-4   No Disabled Menu Items to View
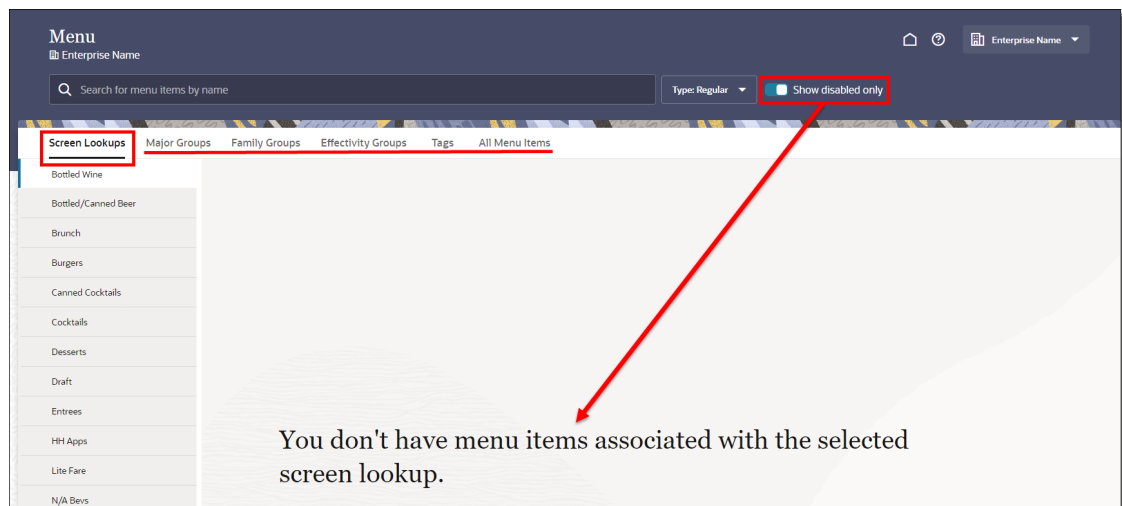
Changing Menu Item Details

See the following topics for more information on changing menu item details:

Enable or Disable a Menu Item

The menu item status controls the availability on the POS client. Enabled menu items are available to be sold in your restaurant. Disabled menu items are items that a restaurant has no intention of selling. This feature is used primarily by franchise restaurants where certain food or beverage items are unavailable in their region, state, or country.

Menu items are enabled by default.

1. Click the menu item.

2. In the **Status** drop-down, select **Enable** or **Disable**.

Figure 3-5   Menu Item Status Enabled

3. Click **Update**.

Assign Screen Lookups

A screen look up (SLU) is used to organize menu items so that workstation operators can easily find them in POS Operations. Menu items assigned to a SLU group appear together on touchscreens in the POS client. In some cases, the SLU is also used to control on which screens an item appears in external ordering systems that are integrated into Simphony.

A SLU key provides access to a list of related menu items. When a workstation operator clicks a SLU key, the system creates a touchscreen page for each menu item with a matching SLU number. For example, you can have a SLU for Apps that shows only the menu items associated with appetizers on the POS client.

You can assign each menu item master record to a maximum of eight different SLUs.

1. Select the menu item.

2. Click the Screen Lookup in the side list, and then click the menu item.

3. To assign a SLU group to the menu item, select a SLU group in the **Screen Lookup 1** through **Screen Lookup 8** drop-down lists.

Figure 3-6   Assign SLU Lookups

4. (Optional) Enter a **Screen Lookup Sort Priority** (between 1-99) for the menu item.

   When **Screen Lookup Sort Priority** is used, menu items with Sort Priority 1 appear on the screen first, followed by menu items with Sort priority 2, and so on up to Sort Priority 99, and then finally Sort Priority 0 items. (Priority 0 means "Do not sort"; items with 0 appear at the end of the list.) Typically the most popular menu items have Sort Priority 1 for easy access. Items in the same SLU can belong to the same **Screen Lookup Sort Priority**.

5. Click **Update**.

Configure Default Condiments

Condiments allow workstation operators and guests to customize orders. A Condiment Set tells the system which condiments to automatically add to a menu item when it is ordered. For example, a hamburger may have a default Condiment Set containing lettuce, tomatoes, and pickles.

Condiment menu items can be assigned to Condiment Groups to organize similar ingredients or instructions and make them available to menu items. By categorizing condiments into

groups, operators can quickly find ingredients or instructions without having to search through a long list of options on the POS client.

Required condiments are condiment groups the system requires workstation operators to select from when ordering a menu item. For example, a steak may have a required condiment group called meat temperatures containing rare, medium rare, medium, medium well, and well done.

Allowed condiments are condiment groups that do not come with a menu item by default but are available to add to an order. For example, a guest may request a side of BBQ sauce with chicken fingers that comes with honey mustard sauce by default.

1. Select the menu item.

2. To add a Default Condiment Set:

   a. Click **Condiments**.

   b. To add, click **Add** beneath the Default Condiments heading.

   Figure 3-7   Add Condiment

   c. Select the condiments in the Condiment Sets list, and then select the following options.

      • **Display when in default state**: Select this option to show the default condiment set in POS Operations.

      • **Charge for entire sales count**: Select this option to charge guests for the condiment count.

        For example, if a hamburger comes with two slices of cheese by default, the guest is charged regardless of whether they order one or two slices of cheese on the hamburger. If you do not select this option, guests are only charged when the condiment count exceeds the default count.

Figure 3-8   Set Default Condiment Set

d.   Set the **Sort Group** priority.

All condiment sets appear in POS Operations according to the **Sort Group**. Condiment sets in **Sort Group** 0 appear first, followed by 1, 2, and so on.

e.   Click **Add**.

3.   To enable or disable a Default Condiment Set:

a.   Click **Condiments**.

b.   Click the View Condiments icon
(

) adjacent to the Condiment Set in the Default Condiments list.

c.   Click the Condiment Set in the side list, and then click the condiment item.

In the following figure, the Burger Bowtie Condiment Set includes three condiments: Lettuce, Pickles, and Tomatoes.

Figure 3-9   Select Condiment Set and Condiment Item

d.   In the Status drop-down list, select **Enable** or **Disable**.

e.   Click **Update**.

4.   To remove a Default Condiment Set, click the Remove Condiment Set icon
     (

) adjacent to the Condiment Set in the Default Condiments list, and then click **Update**.

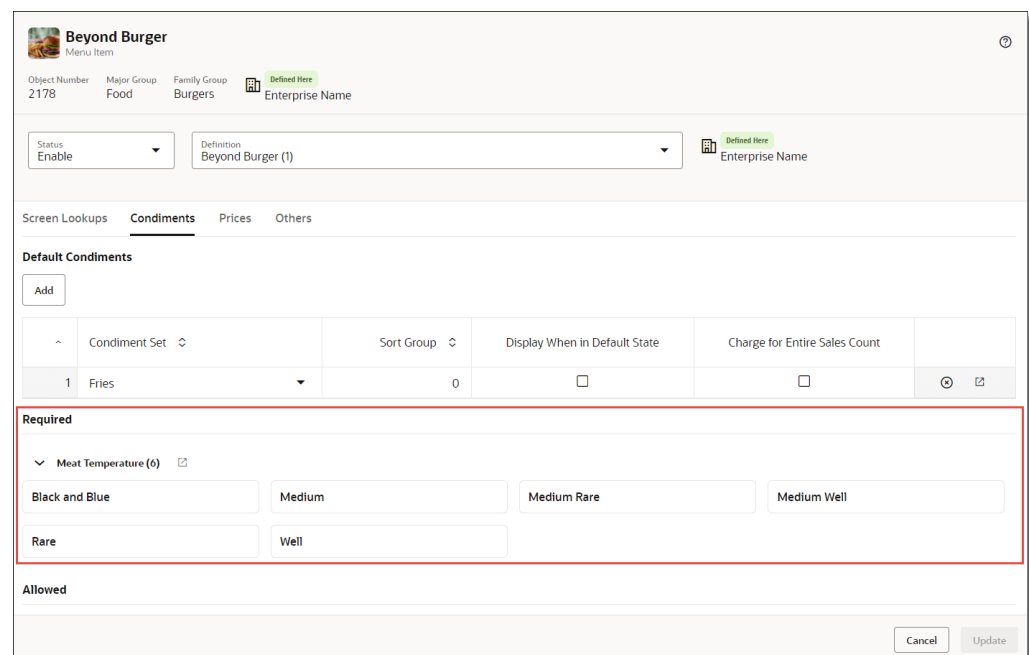5.   To review Required Condiments:

     a.   Click **Condiments**.

     b.   Under the Required heading, click the right arrow to expand each required condiment
          group and see the condiments.

          In the following figure, the Required condiments include a Meat Temperature
          Condiment Group that has six condiments.

     Figure 3-10   View Required Condiments for a Condiment Group

     c.   Click the View Condiments icon
          (

) adjacent to the required condiment group.

     d.   Click the Condiment Group in the side list, and then click the condiment item.

     e.   In the Status drop-down list, select **Enable** or **Disable**.

     f.   Click **Update**.

6.   To review Allowed Condiments:

     a.   Click **Condiments**.

     b.   Under the Allowed heading, click the right arrow to expand each allowed condiment
          group and see the condiments.

In the following figure, the Allowed condiments include a Burger Add Ons Condiment Group that has seven condiments.

Figure 3-11   View Allowed Condiments for a Condiment Group

c.   Click the View Condiments icon
(

) adjacent to the allowed condiment group.

d.   Click the Condiment Group in the side list, and then click the condiment item.

e.   In the Status drop-down list, select **Enable** or **Disable**.

f.   Click **Update**.

Set Menu Item Prices

A menu item price is the amount charged for the sale of a menu item. Typically a menu item only has one price. However, in some cases an item has multiple prices. For example, a soda could have separate prices for a small, medium, and large size.

1.   Click the menu item.

2.   To change the price:

a.   Click **Prices**, click the **Actions** icon (**…**), and then select **Edit Price**.

Figure 3-12   Prices Tab

b.   On the **Details** tab, enter the **Menu Item Price**.

Figure 3-13   Price Details

c.   To change the main or sub menu level, select the new menu level in the **Active on Level** drop-down list.

See the **Menu Levels** chapter in the *Oracle MICROS Simphony Configuration Guide* for more information.

d.   To change the effectivity group for a menu item promotion, select the **Effectivity Group** in the drop-down list.

Effectivity Groups are used to schedule when menu items or their prices are available. They are typically used in conjunction with upcoming holidays, special events, or promotions. For example, you can set menu item prices for a promotion that only runs on New Year's Day.

e. To change the tax class, click the **Taxes** tab, and then select the **Tax Class Override** in the drop-down list.

Figure 3-14   Price Taxes

See the **Tax Rates and Tax Classes** chapter in the *Oracle MICROS Simphony Configuration Guide* for more information.

f. Enable the appropriate condiment options:

- **Menu item tax class override takes precedence over condiment parent tax class**

- **Exclude condiment parent item from menu item tax class override count**

g. Click **Apply**.

3. To add an Effectivity Price record:

a. On the **Prices** tab, click the Actions icon (**…**), and then select **Add Effectivity Price**.

b. Select the **Effectivity Group**.

Figure 3-15   Add Effectivity Price

c. Click **Update**.

4. To delete a price record, click the Actions icon (**…**), and then select **Delete**. Confirm by clicking **Delete** again.

Set Print Class Override

A Print Class is a field in Simphony which determines where orders go for output destinations. A single Print Class that has multiple records can have the output destination set once rather than separately for each record.

1. Select the menu item.

2. Click **Others**.

3. Select the **Print Class Override** output destination from the drop-down list.

   The **Print Class Override** allows the menu item to be delivered to the production area.

4. Click **Update**.

Set KDS Preparation Time

Menu item timing ensures all items in an order are prepared and ready to serve at the same time. You can assign a preparation time to each menu item. This determines how long the menu item will be held (relative to the rest of the order) before it is fired to the kitchen if your restaurant has a Kitchen Display System (KDS).

You need to enter the time for all menu items and condiments which affect the prep time either negatively or positively.

1. Select the menu item.

2. Click **Others**.

3. Enter the time it takes to prepare the menu item (in minutes and seconds) in the **KDS Preparation Time (MM:SS)** field.

If the item has a negative prep time (for example, a condiment that changes the item's prep time), enter a minus sign before the minutes. Negative prep times are usually assigned to a condiment menu item as a way to modify the prep time of another menu item. For example, if the prep time for a Steak (cooked Medium) is 6 minutes, but the guest orders it Rare, the prep time for the Rare condiment would be -2 minutes. That would set the prep time for the Steak at 4 minutes.

4. Click **Update**.

Add or Remove a Tag for a Menu Item

A tag is a label for a menu item. Tags are commonly used to identify items which are sold through a consumer ordering channel. For example, tags such as "kiosk", "mobile", or "online" might be used to indicate which items can be sold through those channels.

1. Select the menu item.

2. Click **Others**.

3. To add a tag, click in the **Tags** field, and then select the channel from the list.

4. To remove a tag, click the **X** adjacent to the channel.

5. Click **Update**.