Oracle® Hospitality Cruise Shipboard Property Management System

Event User Guide

Release 20.3
F59795-02
June 2023

Oracle Hospitality Cruise Shipboard Property Management System Event User Guide, Release 20.3

F59795-02

Contents

Preface

This document describes the configuration and functionalities available in the Event module

Audience

This document is intended for project managers, application specialists and users of Oracle Hospitality Cruise Shipboard Property Management System (SPMS).

Customer Support

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

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
- Screenshots 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

Table 1 Revision History

Date	Description of Change
September 2022	Initial publication.
June 2023	Updated new customer portal.

Prerequisites, Supported Systems, and Compatibility

This section describes the minimum requirement for the Event module.

Prerequisites

- Event.exe
- OHCSPSMBusiness.dll
- OHCSPMSData.dll
- OHCSPMSDB.dll

Supported Operating System

- See Compatibility Matrix at http://docs.oracle.com/en/industries/hospitality/.

Compatibility

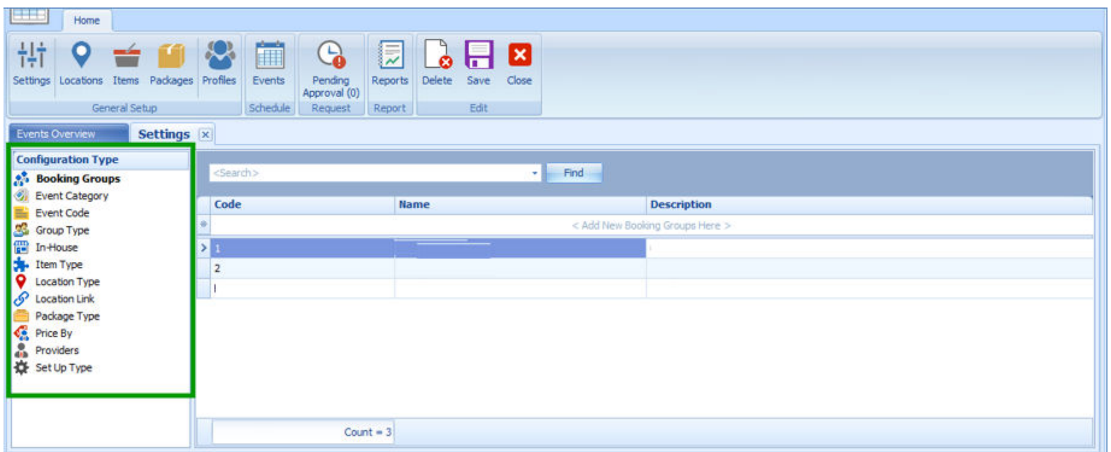
SPMS version 20.3 or later. For customers operating in version 20.3 and below, a database upgrade to the recommended or latest version is required.

1
General Setup

The General Setup section is where you configure the codes used in module such as booking type, event category, locations, and items used by the event, special packages and profiles of the event required when creating an event. The following setup will assist you in organizing and placing the necessary orders for items required by an event.

Event Settings Overview

Figure 1-1 System Setup



The Event Settings Overview is the main configuration window for setting up parameters and settings for furniture fitting, sound systems, utensils, and other equipment needed by the ship operator to organize an event. The Configuration Type features Booking Groups, Event Category, Event Code, Group Type, In-House, Item Type, Location Type, Location Link, Package Type, Price By, Providers, and Set Up Type Functions.

Configuration Type

Configuration Type contains all the general settings used in the Event module and are described below:

- **Booking Group:** The Booking Group holds the security codes that determine who is allowed to book or change an event location.
- **Event Category:** The Event Category code is used to categorize the type of event and is mainly used in report printing.
- **Event Code:** The Event Code holds the Priced By, Event Category, and Event Name that enables a quick entry of an Event on the Event Detail Form.
- **Group Type:** The Group Type code defines the specific type of Group, which vary from one Cruise Line to another.

- **In-House:** The In-House code defines an event category associated with the department or area for a non-group event.
- **Item Type:** The Item Type code defines the items by groups, for example, cutleries, linens, furniture and much more.
- **Location Link:** The Location Link holds a generic code for a location that groups a few locations, to facilitate the copying of templates from one ship to another.
- **Package Type:** The Package Type defines the packages used to help find a specific package.
- **Price By:** This stores the price by codes available to the cruise liner. See the table below:

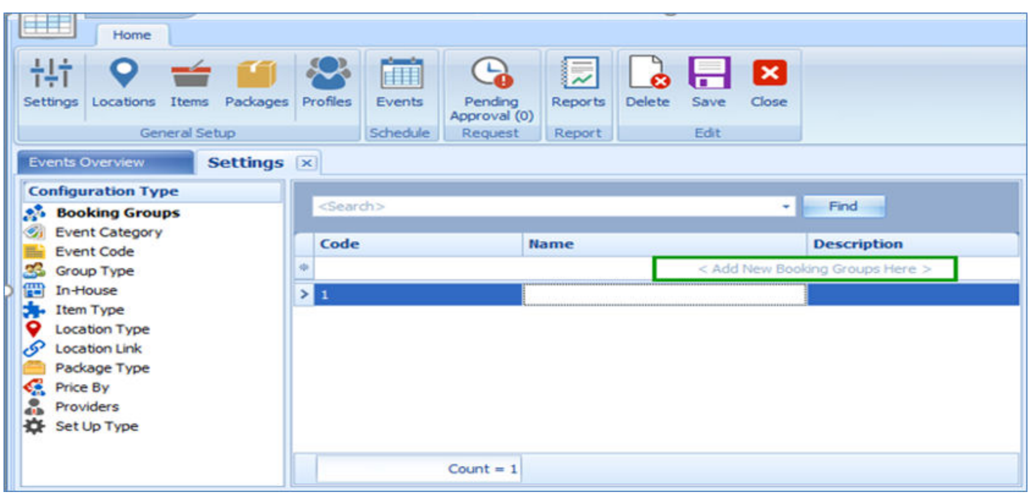
Table 1-1 Price by Configuration Type

Field Name	Description
C	Consumption
F	Fixed
A	Fixed Guests
R	Fixed Cabins
L	Calculated Guests
S	Calculated Cabins

- **Providers:** The Providers code defines the shipboard group responsible for fulfilling items required by the event.
- **Setup Type:** The Setup Type defines the available seating or set up for the location. For example, U-Shape seating, Theatre, Pool Party, Conference, and others.

Adding New Configuration Codes

Figure 1-2 New Configuration Codes Window



1. From the ribbon bar General Setup group, click **Settings** and then navigate to Configuration Type to select the configuration type to add.
2. The Code field is mandatory. Insert the code, name, and description in the field below the Search bar, and then click **Save** to save the record.
3. When you click **Save** on the input field when the code is empty, the system prompts a warning message: *Please enter a unique code. Do you want to correct the value?*
4. Click **Yes** and insert the code accordingly.
5. Click **Save** to save the record.

Editing Configured Code

1. From the Configuration Type panel, select the code to edit and then change the description accordingly. Only the name and description column is editable.
2. Click **Save** at the ribbon bar to save the changes.

Deleting Configured Code

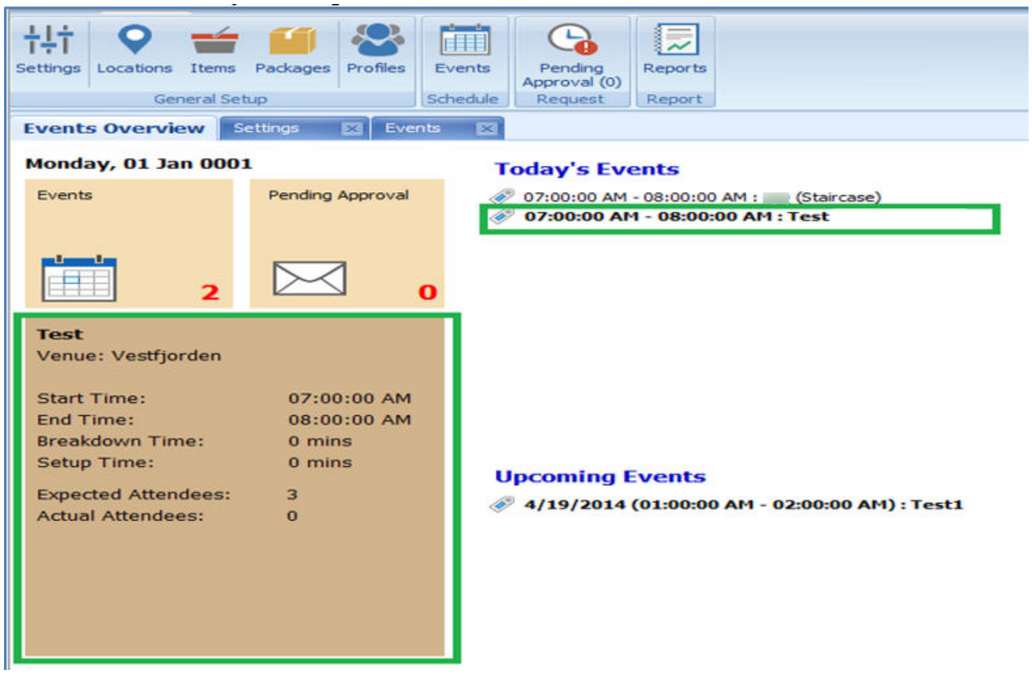
- Select the code to delete and click **Delete** on the ribbon bar.

Searching for Configured Code

1. Select the Configuration group from the container and then navigate to the **Search** bar.
2. Enter the keyword in the search bar and click **Find** to search. The matching results are highlighted in yellow.

Events Overview

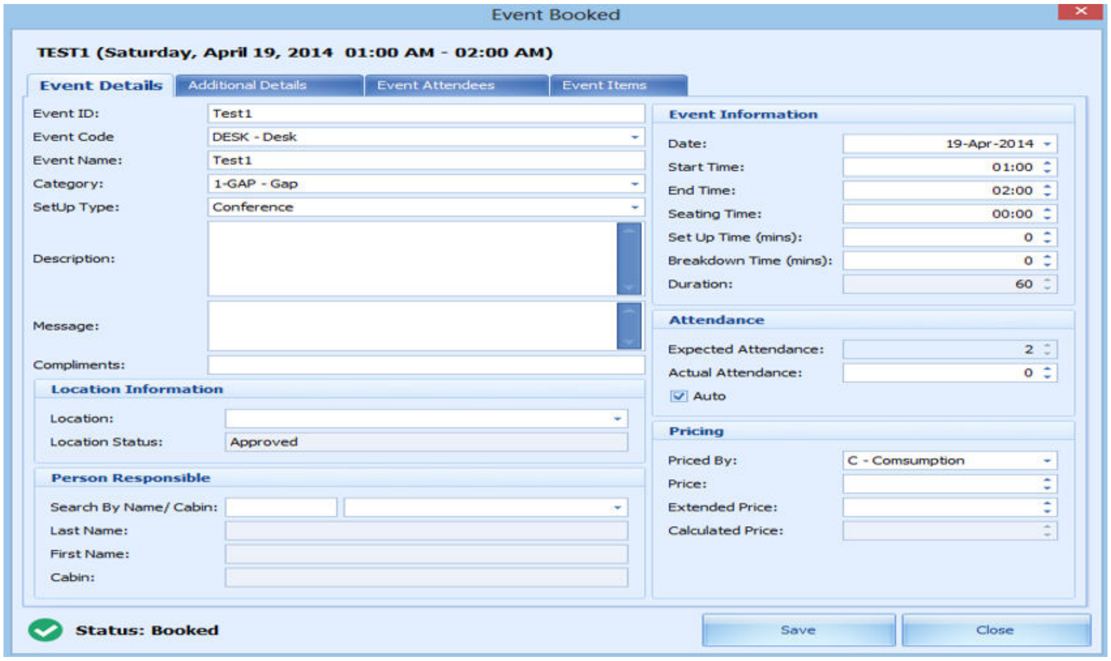
Figure 1-3   Events Overview



The Events Overview shows the summary of events for today and upcoming events with the summary of total events pending approval. Click the functions available on the window to view additional event information details.

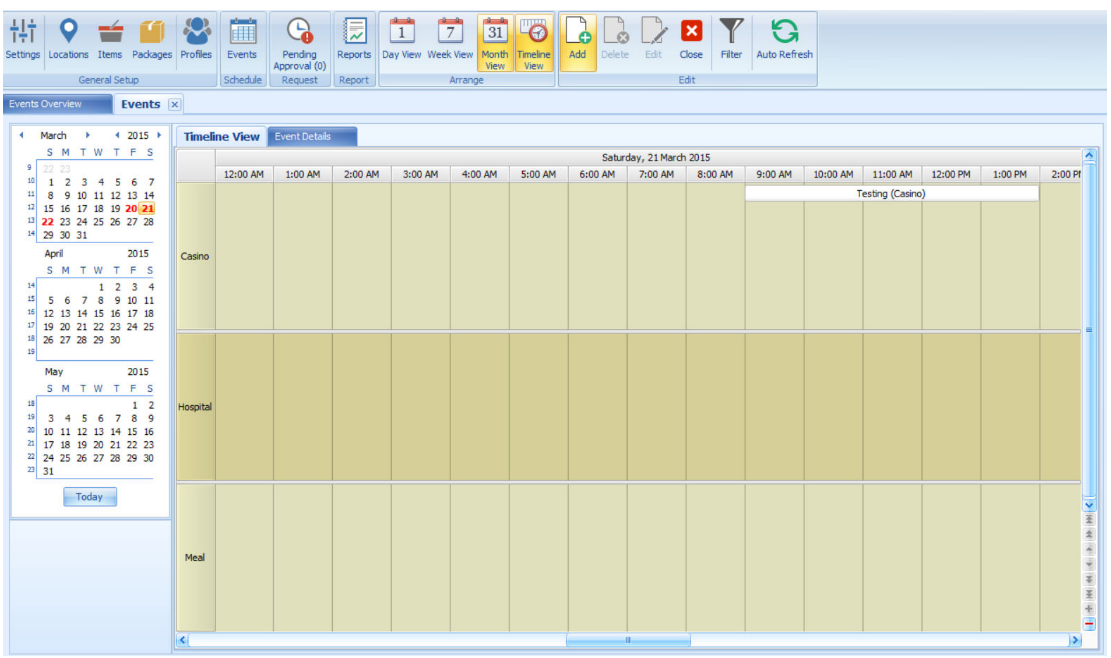
Double-clicking on any available event in the Today's Events or Upcoming Events section launches the Event Booked window.

Figure 1-4 Event Booked



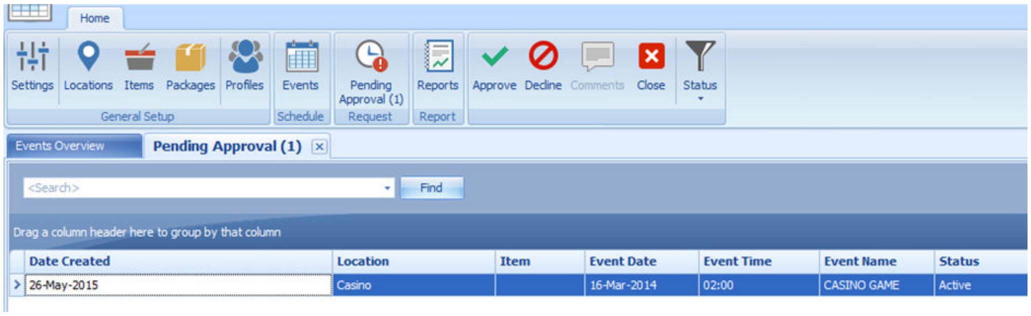
Clicking the number of **events** in the Events section displays the event in Date, Week, Month or Timeline grid. You can also add or edit an event from this window. See *Event Management* section for steps to add, delete, and edit an event.

Figure 1-5 Events —Timeline View



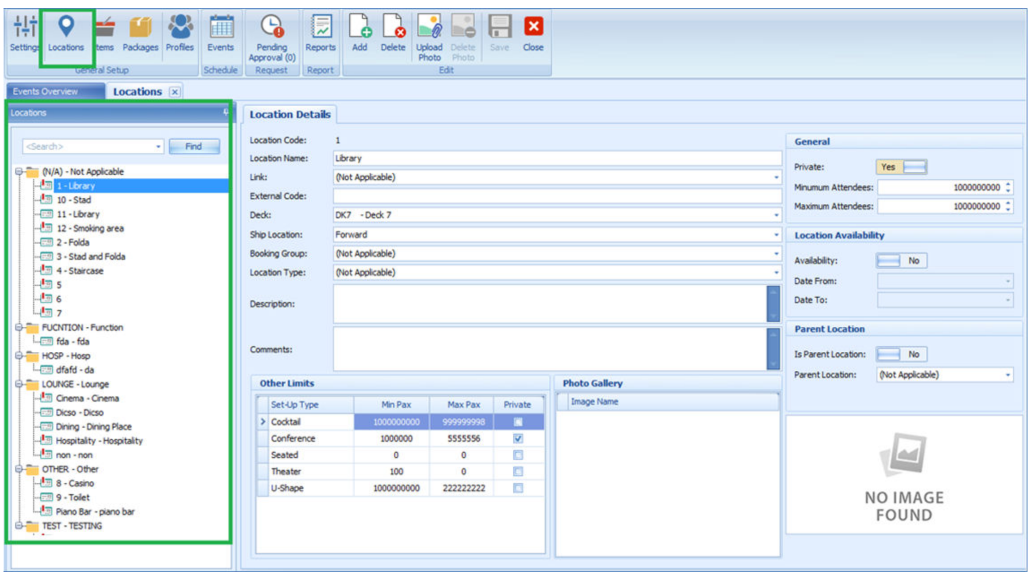
Clicking the number in the Pending Approval section displays the list of events that are waiting to be approved.

Figure 1-6 Event - Pending Approval Tab



Locations Setup

Figure 1-7 Locations Tab



The Locations Setup is accessible through the **General Setup, Locations** icon on the ribbon bar. It shows the location available for an event booking and is grouped by location category.

In each location, you can define the location details, determine the seating style suitable for that location, attach a photo gallery and set the minimum/maximum person allowed. All of these settings are linked to codes configured in Event Settings Overview.

Adding New Location

1. Click **Location** from the General Setup group.
2. On the Location tab, the sub-locations are listed in a container view. Click the **+** button to expand the container list.
3. To add a new location, select the main location, and then click **Add** on the ribbon bar.
4. In the Location Details section, enter all the necessary fields. The Location Code, Location Name, Booking Group, and Location Type are mandatory fields and the system prompts an error when the field is empty.
5. Navigate to the Other Limits section, select the **Set-Up Type** suitable for this location, enter the minimum/maximum number of person allowed for each seating type and select the **Private** check box for events that are held privately.
6. Click the **Upload Photo** icon on the ribbon bar to attach images of the location to the Photo Gallery section.
7. At the General section, insert the minimum/maximum number of attendees allowed using the arrow up/down key. Turning the **Private** toggle to **Yes** indicates that the location use with other events at the same time.
8. At the Location Availability section, the availability is default to **Yes**. Sliding it to **No** makes the location unavailable. Select the available date from/to using the date editor.
9. At the Parent Location section, select the **Parent Location** from the drop-down list if it is a sub-location. Sliding the toggle to **Yes** makes the location a Parent Location.
10. Click **Save** on the ribbon bar to save the location.

Editing a Location

To edit a location, select the location from the location tree view and edit the information and then click **Save** to save the changes.

Deleting a Location

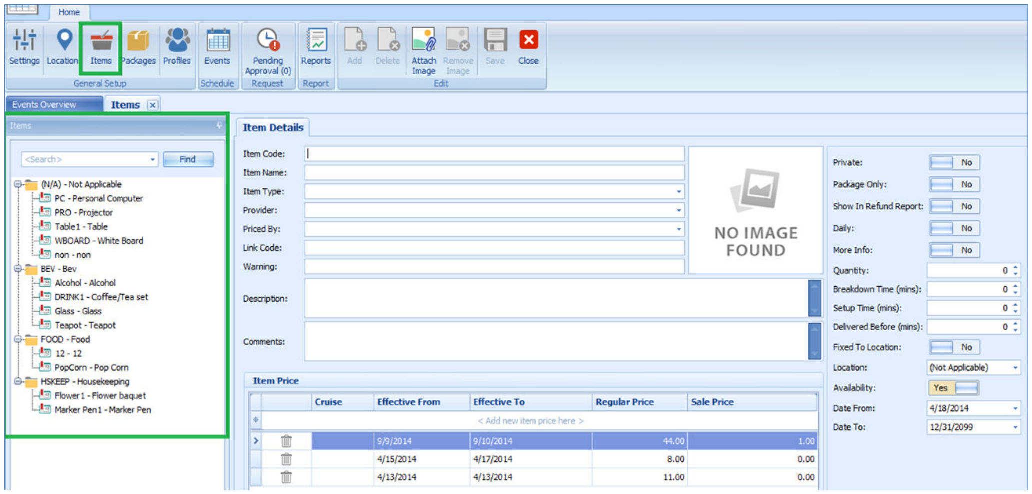
To delete a location, select the location from the location tree view and then click **Delete** on the ribbon bar. You cannot delete a location if an event is linked to it.

Searching a Location

To search for a location, enter the keyword in the location search bar and then click **Find** and all the relevant records will appear in yellow.

Items Setup

Figure 1-8 Items Tab



The Items Setup allows you to define every item used for an event from the type of cutleries, flower arrangements, furniture and others. Multiple prices per item based on a date period is allowed, enabling a selection based om the cruise selection and **Effective From** and **Effective To** dates.

Table 1-2 Control Key in Item Price

Field Name	Description
Private	Determines whether the item is available for a private or public event and this is based on the item’s status.
Package Only	An indicator that item can be used as a package.
Show in Refund Report	An indicator shows whether the items should appear in the Refund report used by Affair Where.
Daily	Controls the quantity of the item to be multiplied by the number of days in the cruise.
More Info	A control to prompt the Item Form for additional information to be entered when items are added to an event.
Breakdown Time	The number of minutes required to take down the item at the end of an event.
Setup Time	The number of minutes required to set up the item at the beginning of an event.
Delivered Before	A number of minutes the item to be delivered before the start of the event.

Table 1-2 (Cont.) Control Key in Item Price

Field Name	Description
Fixed to Location	An indicator that the item is fixed to a certain location and is movable.
Availability	Indicates the item's availability during a specific period.

Adding an Item/Price

1. Under the General Setup group on the ribbon bar, click **Item Setup**. The Item Code, Item Name, Item Type, Provider, and Priced By are mandatory fields. The system prompts an error if one of the fields is empty.
2. On the left of the Items tab, expand the tree view and then click **Add** to add a new item.
3. In the Item Details section, enter all the necessary fields.
4. Navigate to the Item Price section, select the cruise, select the effective date from/to from the drop-down list and insert the regular price and sale price. Overlapping dates are not permissible in item price setup. For an item price changed that is already booked for the current system date or future event, price changes apply to these events also.
5. It is not permissible to set up item prices with an overlapping date. If the input item price has an invalid date, the system prompts a Confirmation prompt. Click **Yes** to edit or **No** to exit without making any changes.
6. Various controls are available and switching these controls to **Yes** does affect the Item Price behavior.
7. Once all the required information is entered, click **Save** to save the changes.

Deleting an Item

1. At the Items tab container, select the item to delete, and then click **Delete** on the ribbon bar.
2. Select **Yes** at the confirmation prompt to delete the item or No to return to the previous menu.

Deleting an Item Price

1. Repeat steps 1 and 2 of Adding an Item.
2. Select the Item and then navigate to the Item Price section.
3. **Right-click** on the Item Price you wish to delete and click the **delete** prompt.
4. Click **Save** at the ribbon bar to save the changes.

2
Events Management

The Events tab gives you a view of ocation availability by day, month, or timeline view and manages the events booking within the same function.

Types of View

You can view events bookings by Day, Week, Month and Timeline View, and each of these layout are different from one to another.

Figure 2-1   Events – Day View

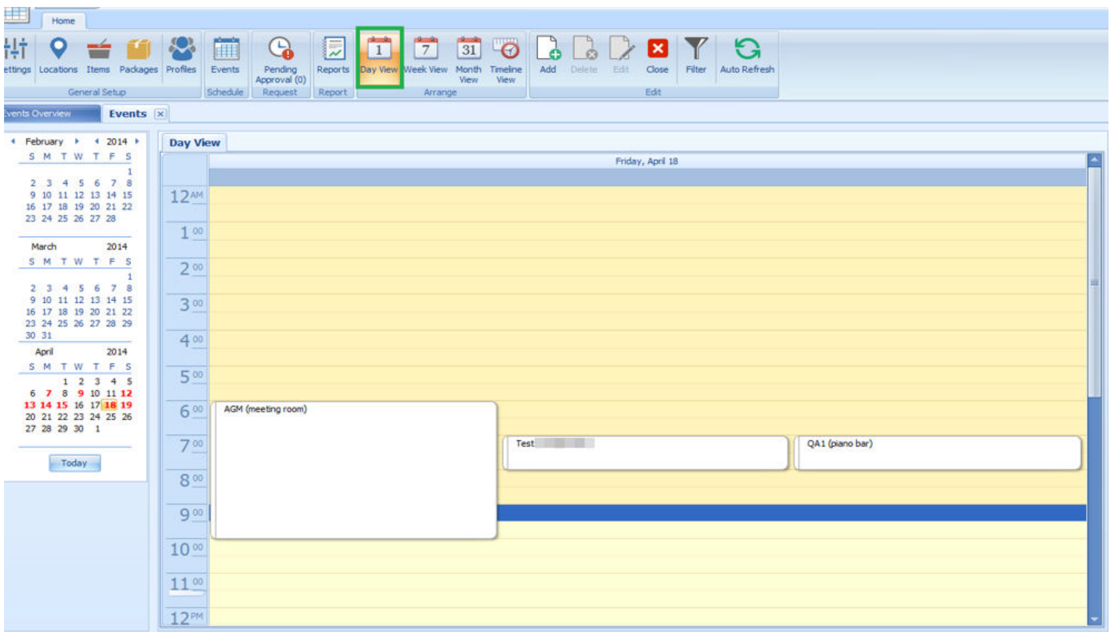


Figure 2-2 Events – Week View

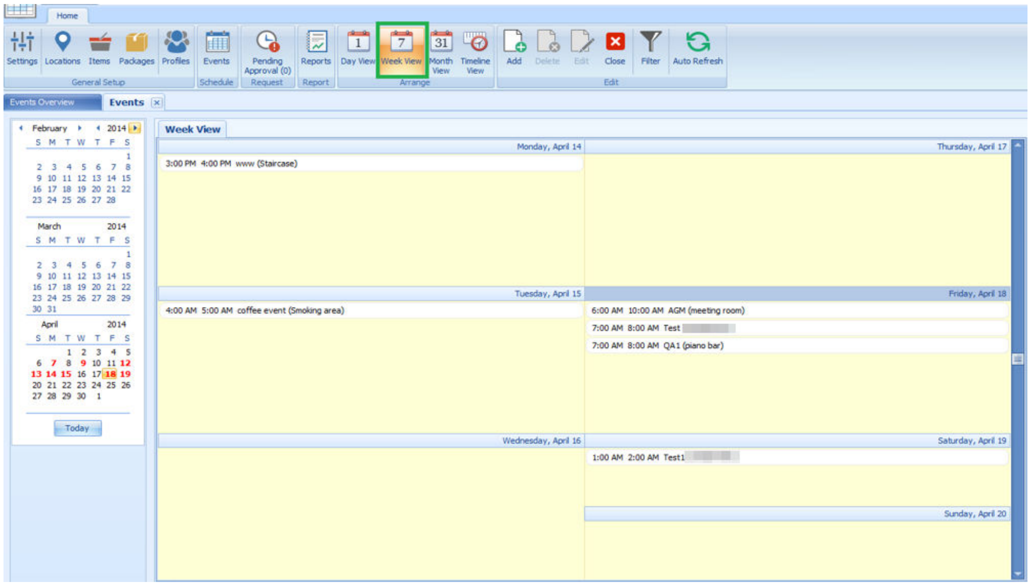


Figure 2-3 Events – Monthly View

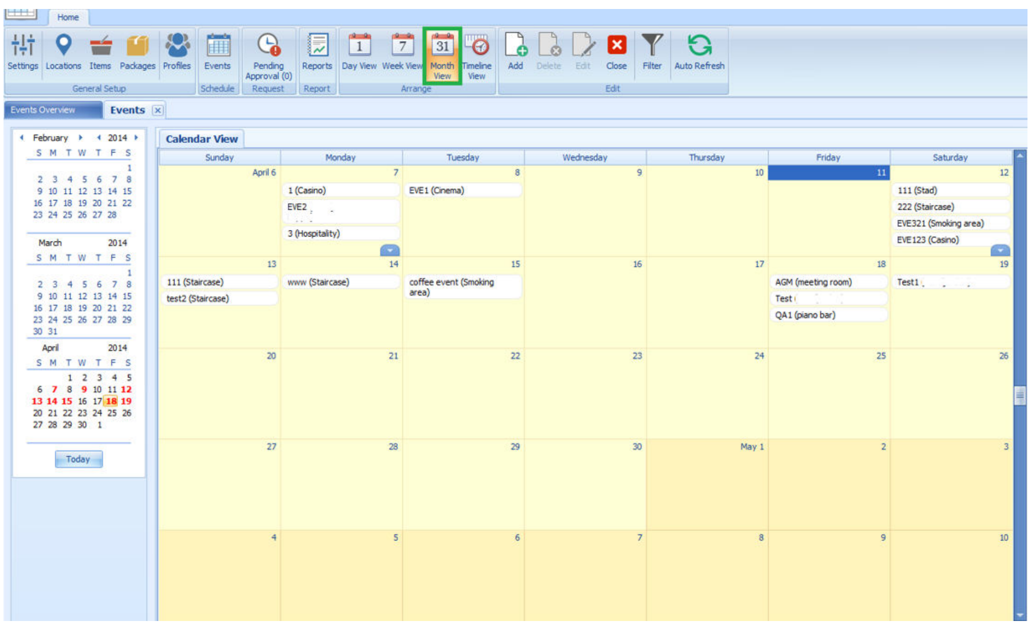
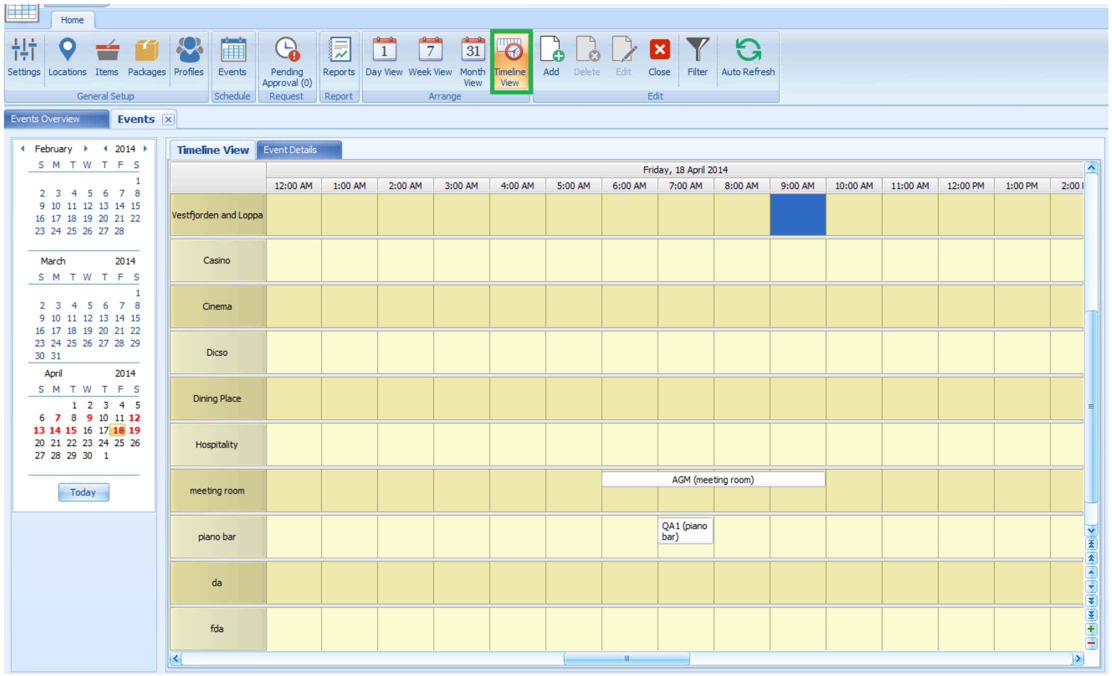


Figure 2-4 Events – Timeline View



To select the type of view to display,

1. Click **Event** at the ribbon bar, then navigate to the **Arrange** group and select the view.
2. On the left of the Events tab, select the **date** using the date editor.
3. Locations for events are displayed on the left of the Events tab. If there is an event booked at that location, the event name is shown in a tree view under the location.
4. Double-clicking an event on the calendar view displays the event by location and start/end time.
5. Clicking **More Details** opens the Event Booked form, which displays more information of the event, additional details, event attendees and event items booked.

Table 2-1 Event Booking Status

Status	Description
Hold	A group status in which the travel plans are uncertain or might be cancelled.
Tentative	A group status that has tentative travel plans.
Booked	The locations or items added to an event and approved.
Paid	A paid event.
Requested	Location or items added to an event and pending approval.

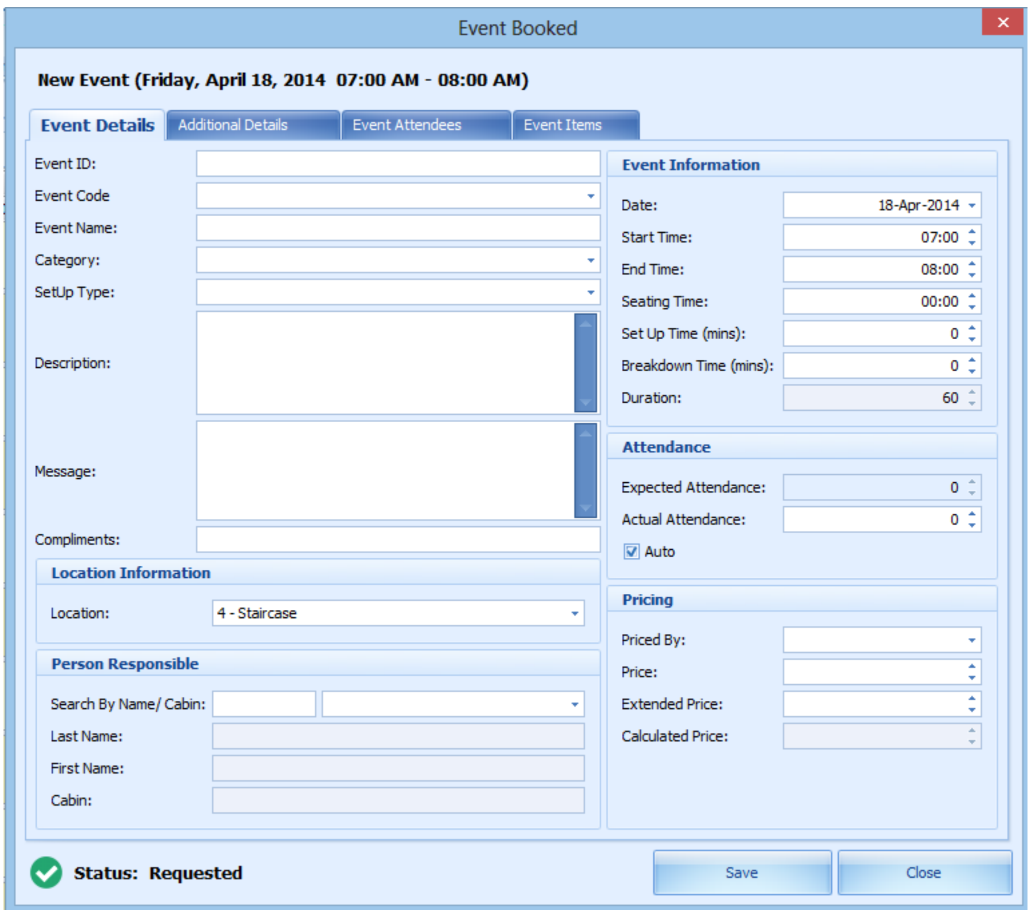
Adding New Event

Before an event can be added successfully, these fields must be filled - **Event ID, Event Code, Event Name, Category** and **Priced By**.

To add an event,

1. Select the Types of View from the ribbon bar, for instance, Timeline View and place the mouse on the start time of the required location.
2. At the time grid, drag your mouse over the time period and click **Add**. The system auto-populates the **Location, Date, Start Date, End Time** and **Duration** in the booking calendar based on the selection and launches the Event Details tab.
3. Insert all the required information. If the mandatory field is empty, the system prompts an error and mark the fields with a red *X*.

Figure 2-5   Event Details Tab



Additional Details

The Additional Details tab stores the itinerary information and event notes, if any.

Figure 2-6 Event - Additional Details Tab

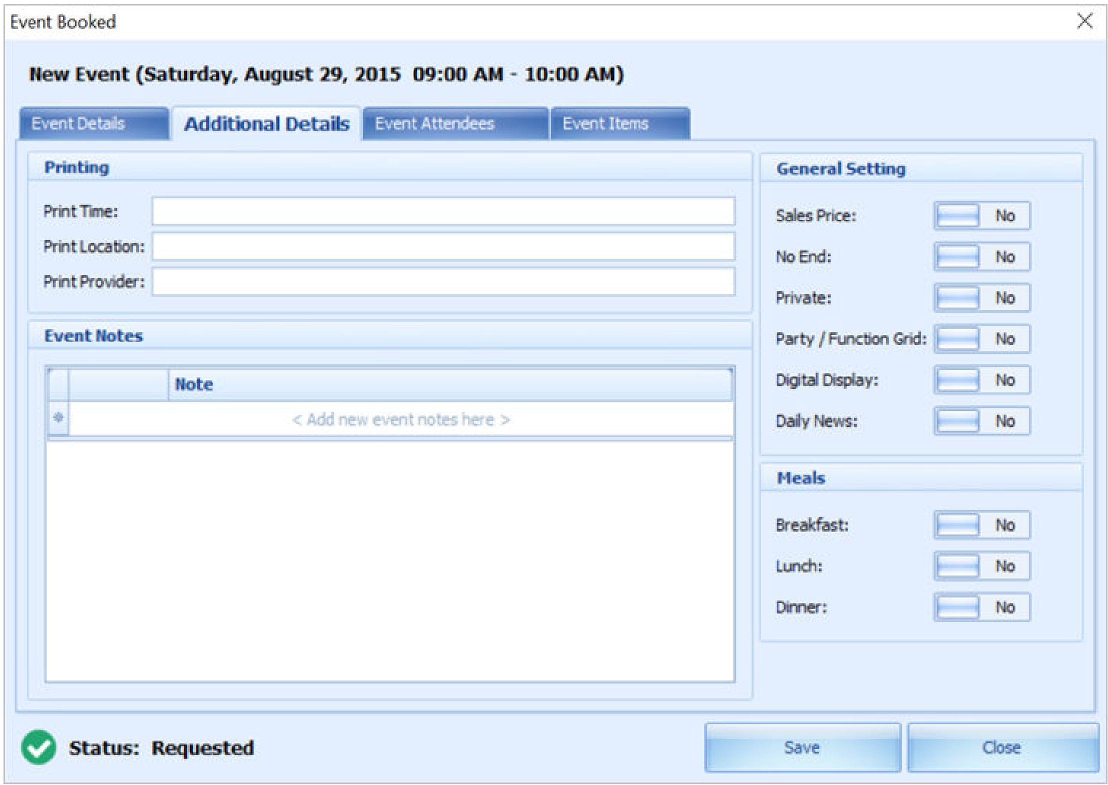


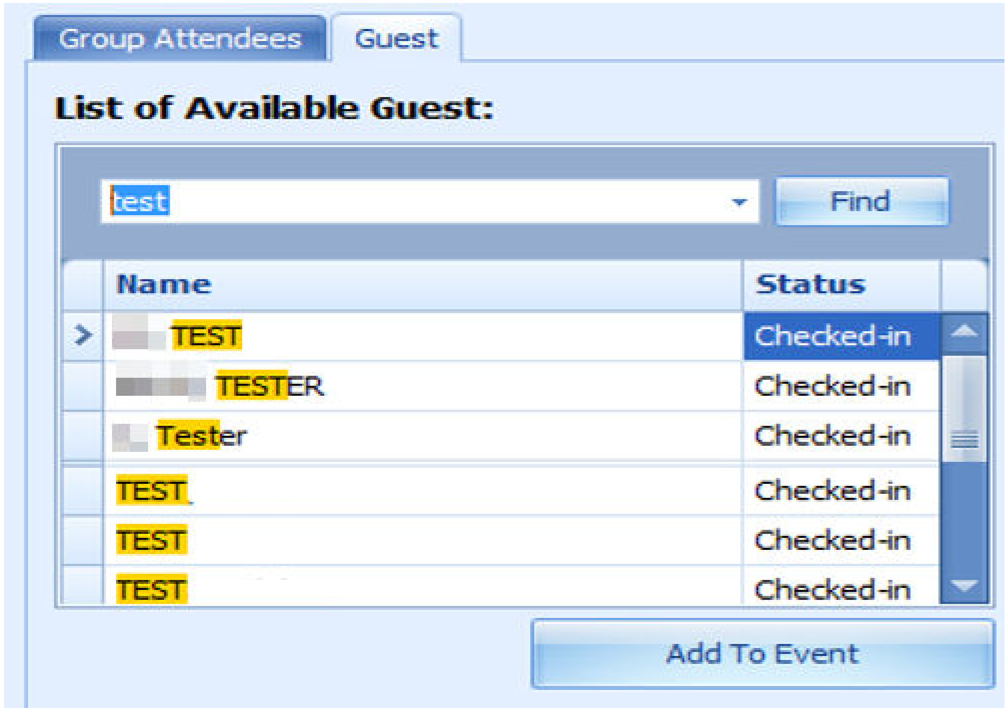
Table 2-2 Field Definition of Additional Tab

Field Name	Description
Print Time	The print time for the client itinerary if the event time is to be shown differently. For example, if a sail away party is scheduled for 5 p.m. for 60 minutes, a print time can be after the boat drill.
Print Location	A location description that overrides the default printer location.
Print Provider	You can be use this on events that may not have items included but you need to show a provider. In this case, the Print Provider can be used to show who fulfills the event.

Event Attendees

The Event Attendees tab allows you to add **Group Attendees** and **Guest** for the event. In Event Booking, members of group attendees are based on attendees in Group Attendees set up in Profiles. For example, group “861B TESTER” has a total of five (5) attendees’ setup in a Profile. When the group “861B TESTER” is selected, these five names then appear in the List of Available Guest in Event Attendees tab.

Figure 2-7 Event Attendees List

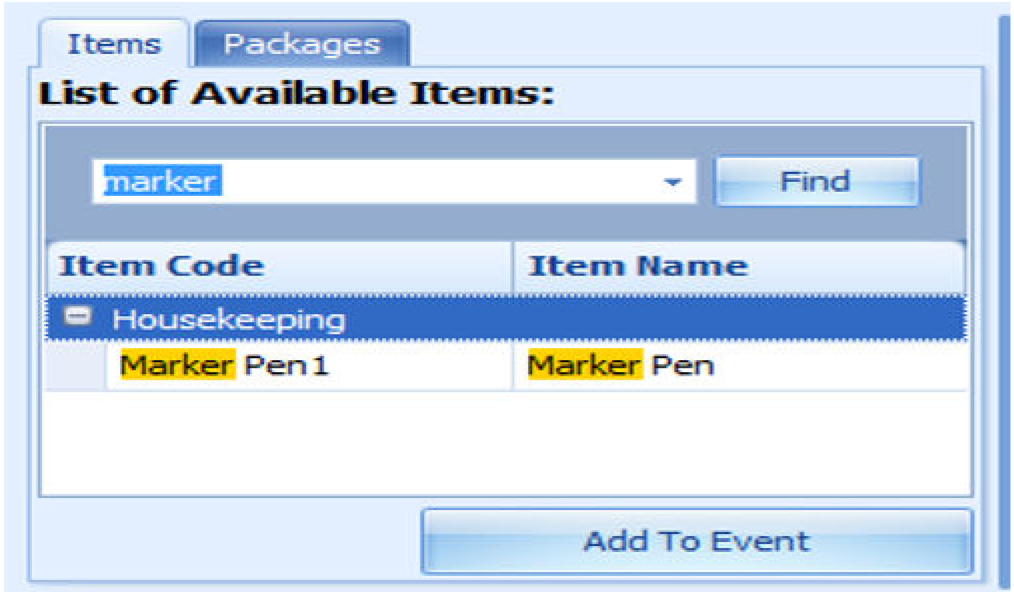


1. To add an attendee, navigate to the **Event Attendees** tab of the selected group.
2. In the Attendees selection window, select the guest to add from the Group Attendees or Guest tab, and then click **Add to Event**.
3. To remove the attendee, select the attendee from the existing list and click **Remove From Event**.

Event Items

The Event Items allows you to select and add items or packages use in the event from items setup in Items Setup.

Figure 2-8 Event Items

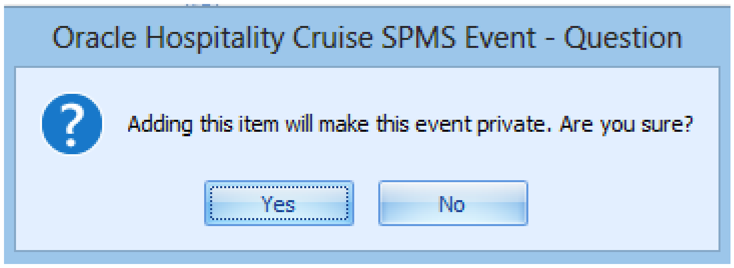


1. From the Event Booking window, navigate to the Event Items tab and select one of the tabs.
2. Available Items or Packages are listed below the tab. Select the item listed in the List of Available Items or Package, then click **Add to Event**.

> **Note:**
>
> Some of the items may increase the setup/breakdown time of the event.

3. By default, the quantity of the selected item is one. To increase the quantity, navigate to Items Use for this event section and use the arrow up/down to increase/decrease the quantity, thus increasing the Total Item Price.
4. Depending on how the Item is set up and provided the warning message prompt is configured. The system prompts an *'Out of Stock'* warning when the item is fully utilized. Click **OK** to close the prompt and add the item to the event.
5. If the item is set as Private in Item as Setup and when adding an item to the event, the system prompts a confirmation message. Clicking **Yes** on the confirmation prompt adds the item to the event and sets the event as Private. Click **No** to exit without making any changes.

Figure 2-9 Item Confirmation



6. To remove the item/packages, select the item from the Items use for the event and click the **Remove from Event** button

Deleting an Event

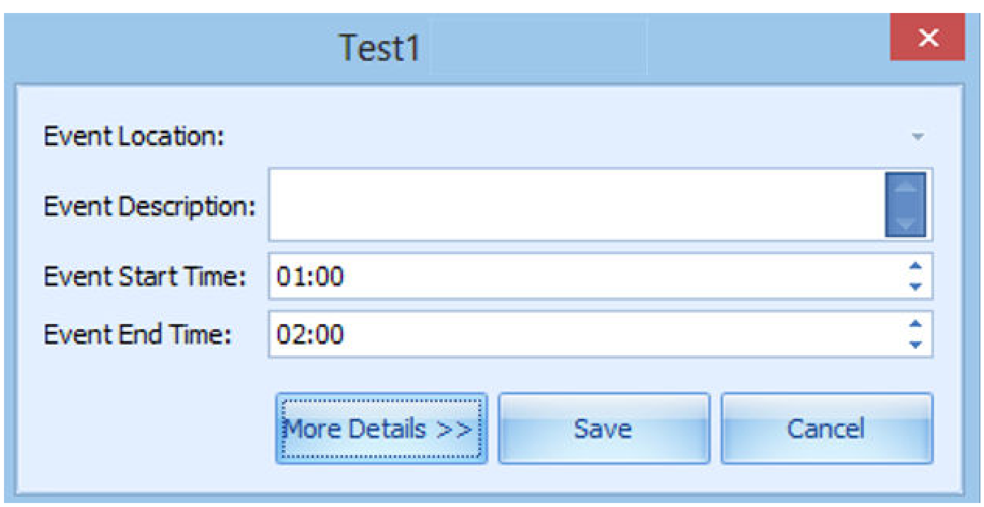
Deleting an event is possible if the guest no longer wishes to go ahead with the booking. Below are the steps to delete an event.

1. Navigate to the Event Overview window.
2. Right-click on the event to delete.
3. At the context menu, select **Delete Event**
4. At the confirmation message, click **Yes** to delete or **No** to exit. Alternatively, you can select the event and click the **Delete** button at the ribbon bar.

Editing an Event

1. To change the event details, select the event from the Event Overview window, then click the **Edit** button at the ribbon bar to open the Event Booking form.
2. Alternatively, you may right-click on the Event and select **Edit Event** from the context menu, then click **More Details** to open the Event Booking form.

Figure 2-10 Edit Event Information



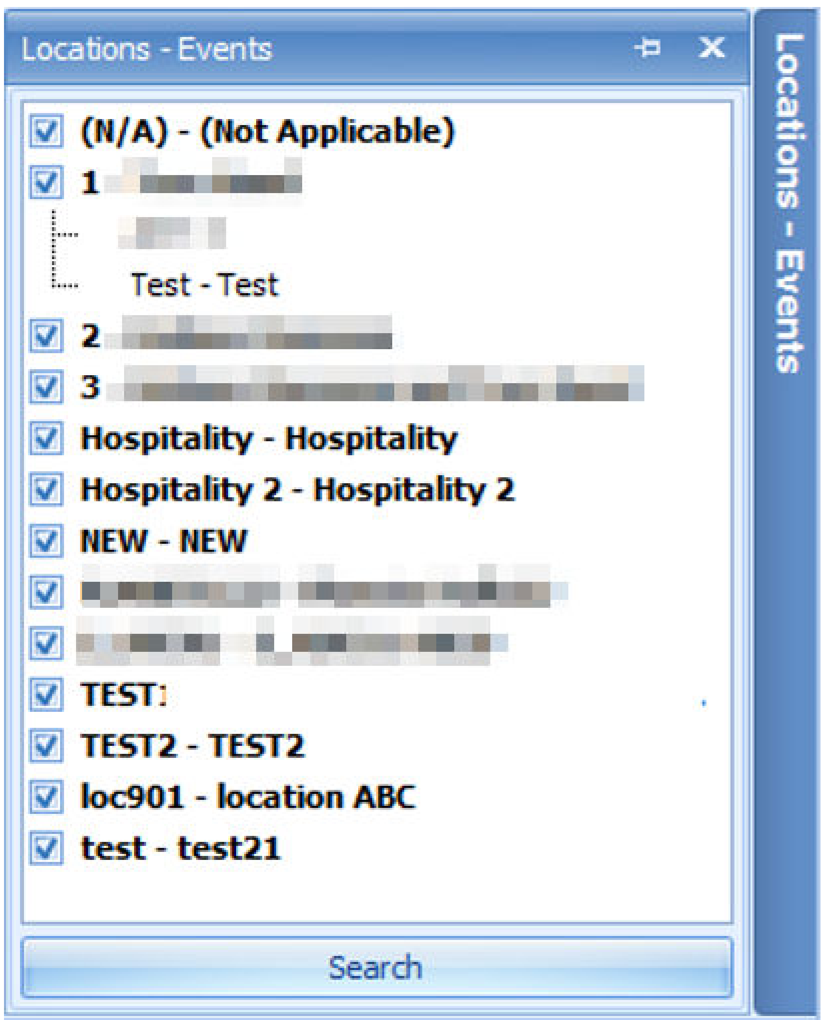
3. Edit the information and then click **Save** to update the changes made.

Filter Options

The Filter functions allow you to filter the events by location. You can permanently dock the filter or set it to Auto Hide.

1. Click **Filter** from the ribbon bar to open the Locations – Events window.

Figure 2-11   Filter Options



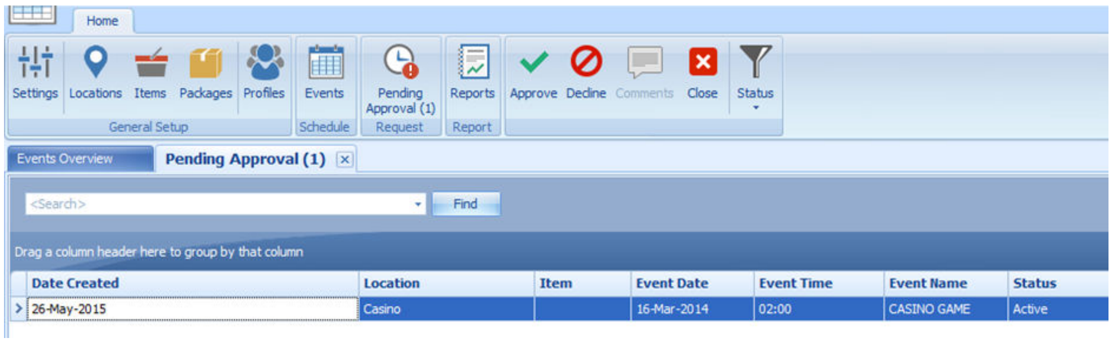
2. All existing events are in a tree view by location. Select the check-box for the location to filter and click **Search**.
3. The system returns relevant events based on the location filter.
4. You can set the Location – Event window to dock permanently or to Auto Hide by clicking the pin icon on the header bar.

Auto Refresh

The Auto Refresh function refreshes the Event Booking every 60 seconds. The Auto Refresh button color changes to orange when enabled. To disable the function, click **Auto Refresh** again.

3
Pending Approval

Figure 3-1   Pending Approval Tab



Most of the event data is imported from DGS ResOnline with pending approval status. To approve/decline these bookings, you must have access rights #4657 granted. The Pending Approval icon is disabled if you do not have the access rights #4657 login.

Approving a Pending Request

1. Select **Pending Approval** from the ribbon bar.
2. The grid displays bookings pending approval. Select the booking from the grid and then click the **Approve** icon at the ribbon bar.
3. At the confirmation prompt, click **Yes** to confirm

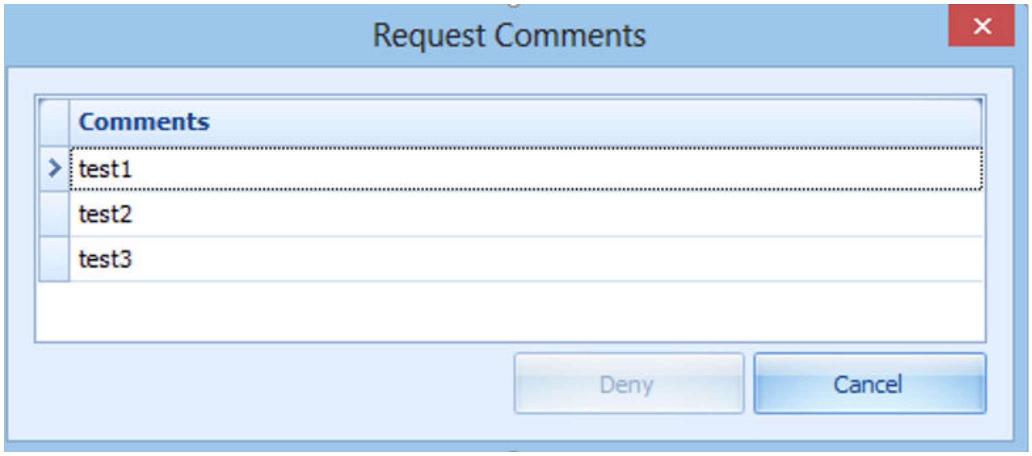
Declining a Pending Request

1. Select **Pending Approval** from the ribbon bar.
2. At the booking from the grid and then click **Decline** on the ribbon bar.
3. At the confirmation prompt, click to confirm.
4. Enter the deny reason in the Request Comments window and then click **Deny** to proceed.

Request Comments

You can view the approved/declined requests comments by clicking the Comments icon at the ribbon bar.

Figure 3-2 Request Comments



Clicking the **Status Filter** at the menu bar allows you to filter all approval requests by status as described in the table below.

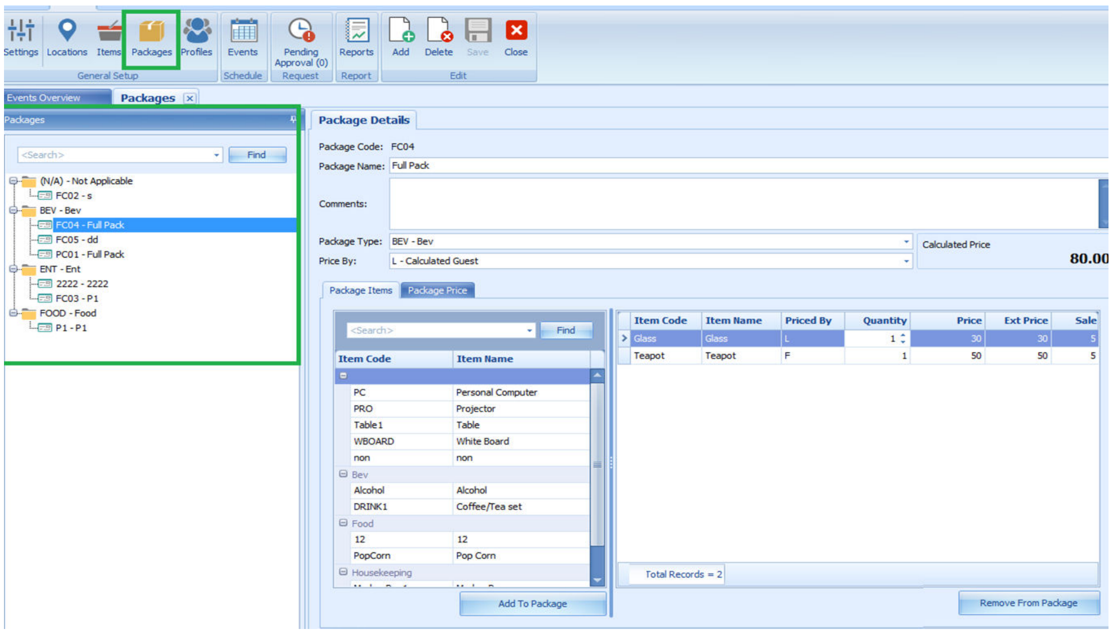
Table 3-1 Status Filter in Comments

Status	Description
All Open	Lists all open status requests for location or item that is waiting for approval.
Open Items	Lists entire item request in open status that is waiting for approval
Open Location	List entire location request in open status that is waiting for approval.
Declined	Display list of declined location/item requests.
Approved	Display list of approved location/item requests.

4

Package Setup

Figure 4-1 Packages Tab



The Package Setup function is accessible on the Packages tab. This function enables you to create packages for an event. The packages for an event booking are group by package category and are listed on the left panel.

Adding New Package and Package Item

1. From the ribbon bar under the General Setup group, click **Packages**.
2. The **Package Code, Package Name, Package Type,** and **Price By** are mandatory fields. Enter the required information and the respective **Price Type and Price By** from the drop-down list. If these fields are empty, the system prompts an error when saving the package information.
3. Navigate to the **Package Items** tab and select the item to add to the package and click **Add to Package**, reducing the items from the selection grid.
4. Edit the quantity under the Item Code if more are required and then click **Save**

Removing Package Items

1. Select the item assigned to the package, and click **Remove From Package**
2. Click **Save**.

Adding New Package Price

The Price and Sale price auto-populate based on the Item Price set up in Items Configuration. The **Ext Price** is the extension price of the Item Unit Price multiplied by Item Quantity, and the total is shown in the **Calculated Price**.

1. In the **Package Details** window, navigate to the **Package Price** tab.
2. Below the field header, select **Event From/To** using the date editor.
3. Enter the **Price** and **Sale Price**.
4. Click **Save** on the ribbon bar to save the changes.

Removing Package Price

1. From the Package Price tab, right-click the price you wish to delete from the grid.
2. At the confirmation prompt, select **Yes** and then click **Save** to save the changes.

Editing a Package

To edit any package information, navigate to the **Package** field, edit the information according and click **Save** to save the changes.

Deleting a Package

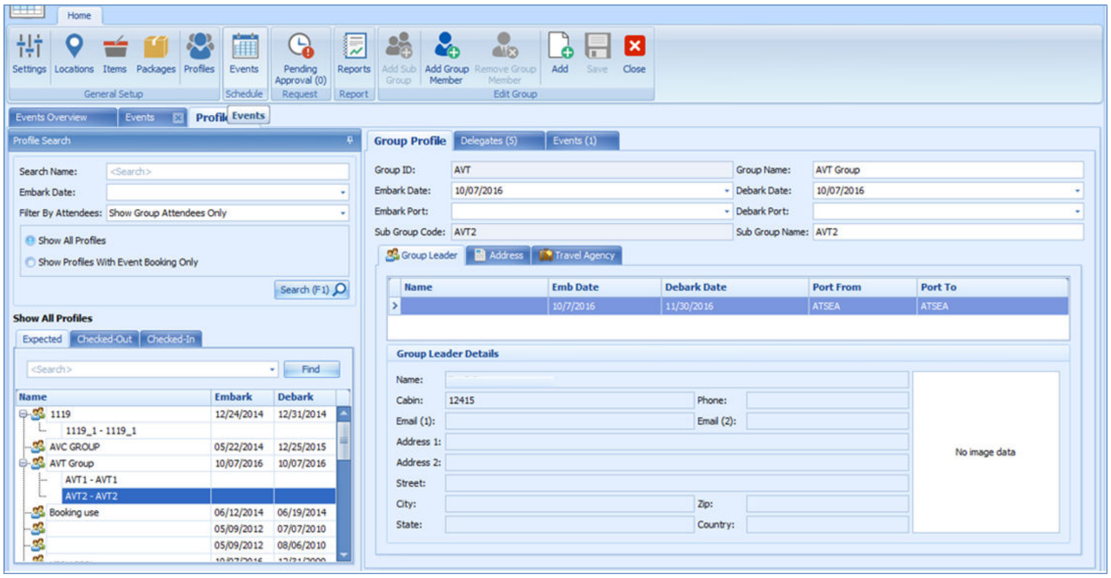
To delete a package, select the package from the package tree view, and then click **Delete** at the ribbon bar. You are not allowed to delete a package if the package is assigned to an event - past or current.

Searching a Package

To search for a package, enter the keyword in the Packages search bar and then click **Find**. All relevant records appear in yellow highlighting.

5
Profiles Setup

Figure 5-1 Event Profile



The Profile function lists the group or individual information for an event booking and is accessible through Profiles tab. This function link the group leader/members or any delegates attending the event.

Group Profiles

The Main Group acts as a parent profile that holds the sub-group and group members for the event. You cannot delete this profile. A sub-group profile is used to manage multiple events from the same group and can have as many sub-groups within the date range of the Main Group

Adding Group Profiles

You would require a Group ID, Group Name, and Embark Date before you can create a profile.

1. Click the **Add** from the menu bar to add a new main group. If the required field is empty, the system prompts an error.
2. Enter all the necessary information and click **Save** to save the newly created main group.

Figure 5-2 Group Profile Tab

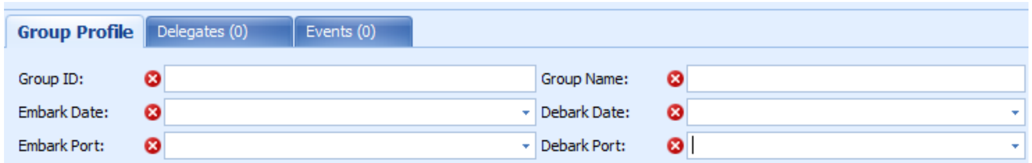


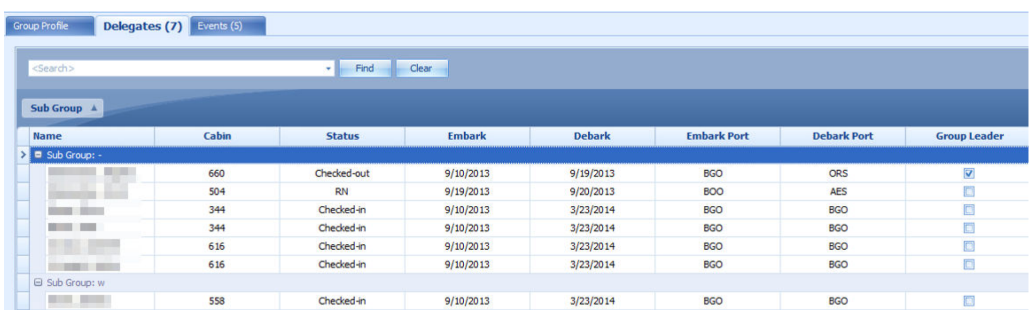
Table 5-1 Field Definition of Group Profiles Tab

Field Name	Description
Embark Port	The embarkation port available for the selected Embark Date.
Debark Port	The debarkation port available for the selected Debark Date.
Group Leader	Group Leader indicator of Main group and sub-group.
Address	The group address and billing address.
Travel Agency	Displays the travel agency information and address of the group.

Delegates

The Delegates tab lists all the delegations belonging to a main group and subgroups. Within this tab, you can assign a group leader for the group simply by selecting the group member and then clicking the Assign Group Leader on the ribbon bar.

Figure 5-3 Event Delegates Tab



To unassign a group leader, select the group leader from the delegate list and click Unassign As Group Leader**.**

Events

The Events tab is an information window that displays the individual event or group attendees of the past or future date by main group or subgroups.

Editing Main Group Profile

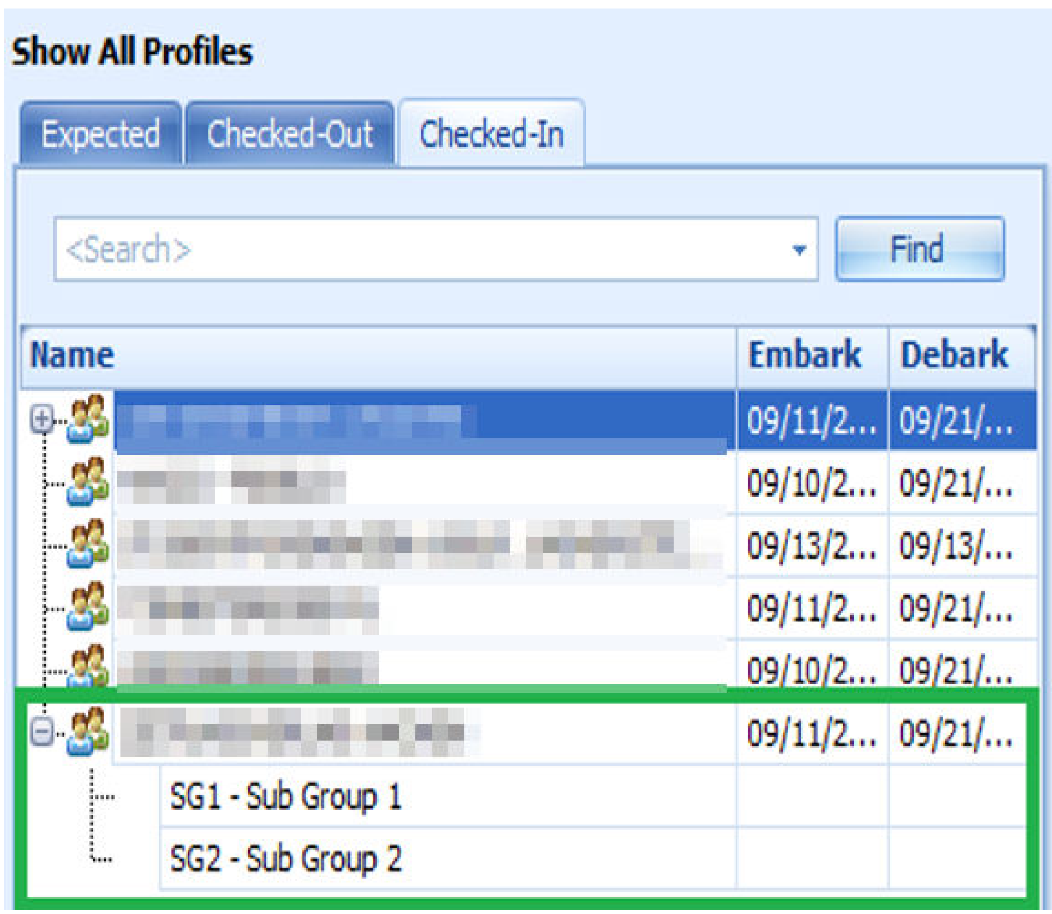
1. To edit group details, search the group using the search function on the left pane.
2. Navigate to the **Group Profile** tab, edit the information, and then click **Save** at the ribbon bar.

Adding a Sub-Group

A sub-group profile is used to manage multiple events within a group and is linked to the Main Group profile.

1. Search the Main Group profile using the Profile Search, then select the Profile.
2. Click the **Add Sub Group** from the menu bar to add a new sub-group.
3. In the Sub-Group window, enter the **Sub Group Code** and **Sub Group Name**, and then click **Save** to save the newly created sub-group.
4. At the confirmation prompt, click **OK** to return to the Profile window.

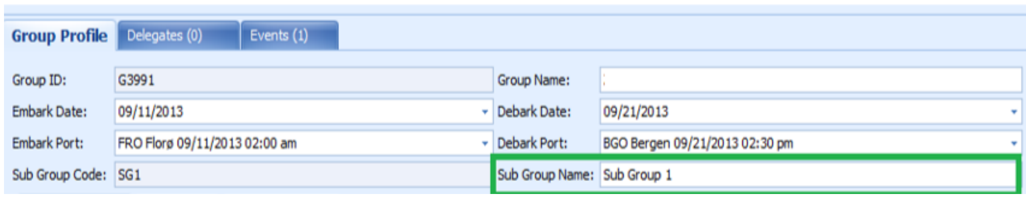
Figure 5-4 Sub Group Profiles



Editing Sub-Group

The information in the Sub Group Profiles is editable and is limited to **Group Name, Embark/Debark Date, Embark/Debark Port, and Sub Group Name**. Changing the Sub Group code is not allowed.

Figure 5-5 Sub Grop Name



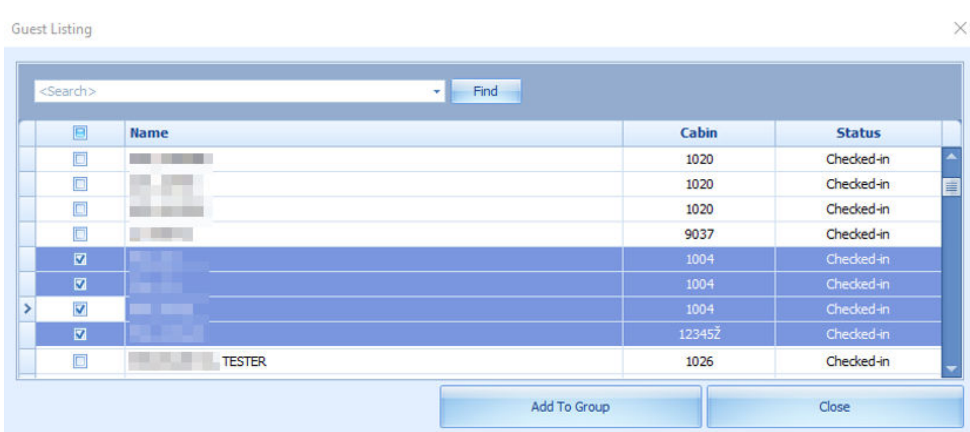
To change the information, select the **Sub Group Name** from the profile listing, edit, and then click **Save**.

Adding Group Delegate

The Group Delegate function links all attending group members to the event. You can add a delegate through the Add Group Member function in Profiles, which then allows you to select the group members attending the event from the Event Attendees tab.

1. Search for the event using the **Profiles Search** function on the left pane of Profiles.
2. Click **Add Group Member** from the menu bar to launch the Guest List.

Figure 5-6 Group Delegate List



3. In the Guest Listing window, select the guest by selecting the check box besides the guest name or use the search function to search for the name and return matching results highlighted in yellow. Click **Add To Group.** The new group member name(s) appear in the Delegates tab.

4. Adding multiple delegates to an event is allowed. If you are adding a guest that belongs to another group, the system prompts a reassignment warning. Click **Yes** to confirm the reassignment.

Removing Group Delegate

The Remove Group Member removes the selected delegate from the group profile. This process deletes the guest from the event group attendees in Event Booking.

1. Search for the group profile from **Profiles Search** function on the left pane.
2. Select the profile and then navigate to the **Delegates** tab.
3. Select the delegate to remove and click **Remove Group Member** from the ribbon bar.

6 Report Setup

All event reports can be previewed, printed, or exported to other formats or custom excel reports from the Report Printing group at the menu bar.

This function requires a report template to be configured in Administration, System Setup, Reports Setup. See *Administration User Guide* for detailed configuration steps.