

Oracle® Hospitality Cruise Shipboard Property Management System Administration User Guide



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ORACLE®

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Preface

Oracle Hospitality Cruise Shipboard Property Management System (SPMS) offers the ship side users access to the ship data. The Administration module is the backbone of the SPMS, where system codes are built according to the approved ship's operational guidelines and requirements. As each of these codes may link to other fields or require other codes to be setup first, it is advisable to study and understand the relationship of each requirement before you start coding. The System Administrator, Chief Purser, Accounting Purser, Crew Purser, Cruise Director, and Group Coordinator and Safety Officer are the key personnel responsible for configuring and maintaining these codes.

Audience

This document is for technical personnel, application specialists, and users of SPMS.

Customer Support

To contact Oracle Customer Support, access My Oracle Support 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/cruise.html>.

Revision History

Table 1 Revision History

Date	Description of Change
October 2023	Initial publication.
March 2024	Added topic SMTP Setup
November 2024	Provided documentation for Package Plan Handling.

1

Administration

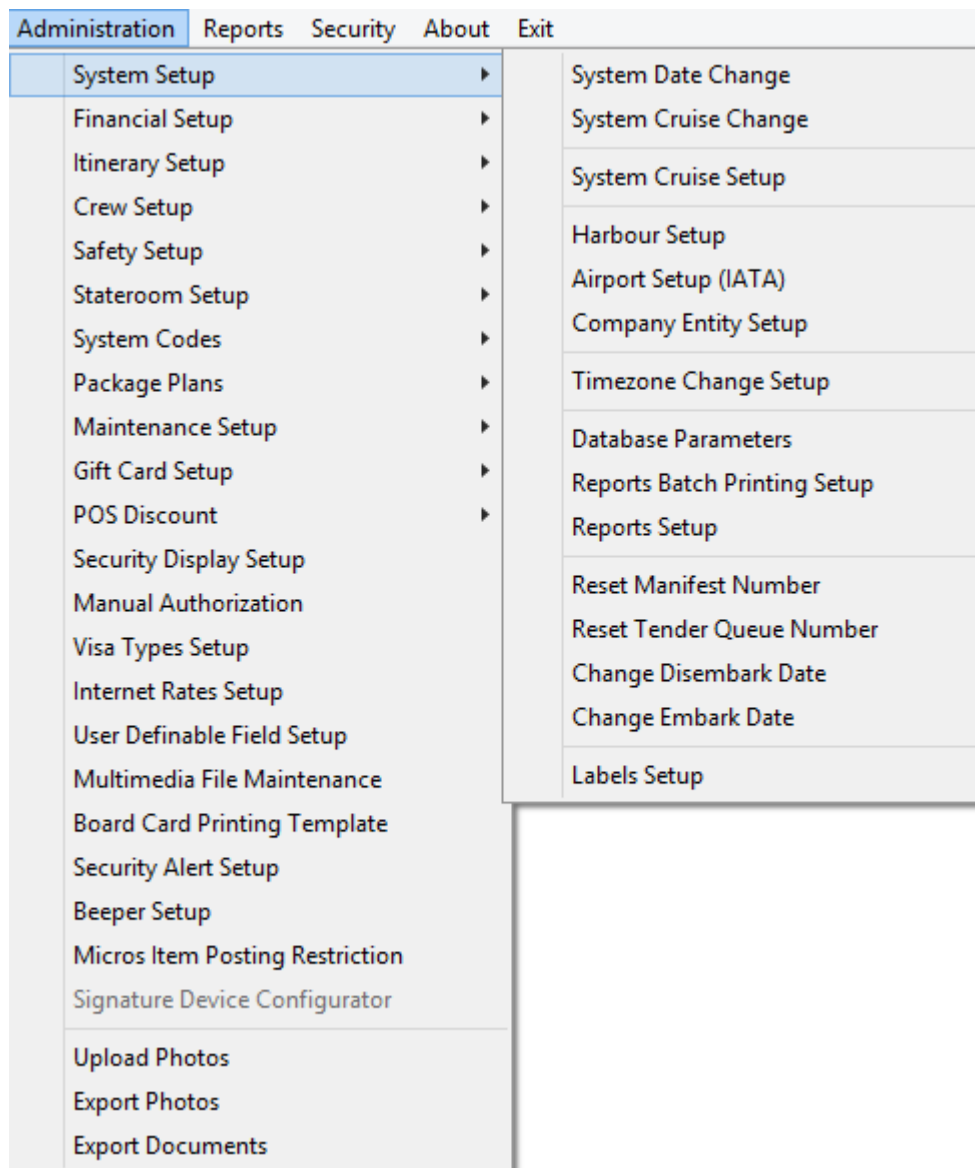
The Administration Menu comprises of configuration input fields required by the ship's operations. Some of the codes depend on another set of code, and may result in some functions not working as desired if they are not properly set up. Consult Oracle Hospitality Cruise Support if you have any questions about configuring the codes.

2

System Setup

In Administration, System Setup Menu, you can set up configurations such as Port of call, System Cruise, System Date Change, System Cruise Change, and Database Parameters.

Figure 2-1 Administration Menu

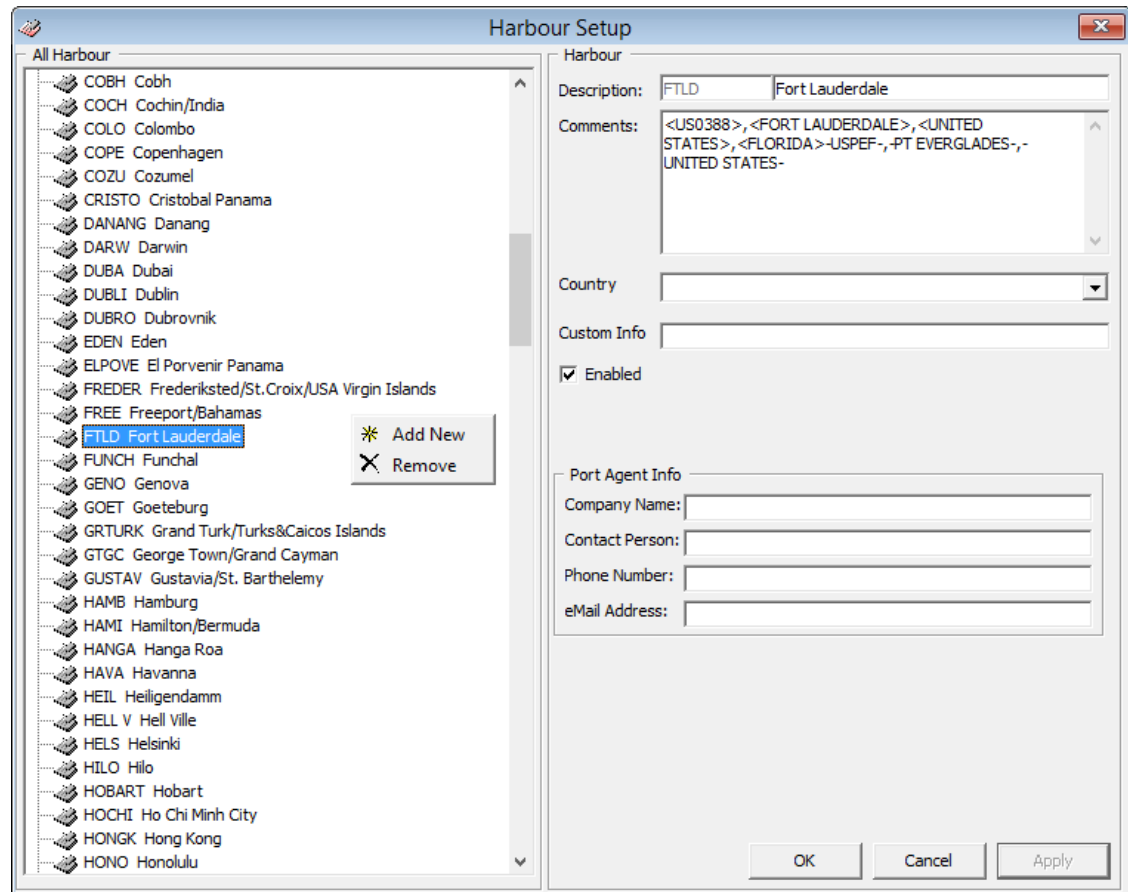


Harbour Setup

The Harbour Setup function enables you to maintain the ship's port of embarkation and the local agent handling the port administration.

Setting Up a Harbour/Port

Figure 2-2 Harbour Setup



1. From the **Administration Menu**, select **System Setup**, and then **Harbour Setup** under the sub-category.
2. In the left pane of the Harbour Setup window, right-click and select **Add New** to add a new code.
3. In the **Description** field, enter the short code and description of the harbour name.
4. In the **Comment** field, enter the **ISO Port Codes** using an angle bracket <> and comma as separator, if any. The system also inserts the standard ISO Port codes from APIS during installation/update in the Comment field.
5. Select the **Country**, if any, from the drop-down list.
6. In the Port Agent Info section, enter the **Port Agent** information and click **Apply** to save the entry. The **Enabled** check box is selected by default. Deselect the check box to disable the code from the selection window.

Removing a Harbour/Port

1. From the Harbour Setup window, right-click the **Port code** and select **Remove**.

- Click **OK** to save and close the window.

System Cruise Setup

Before the ship sets sail on its voyage, you must set up the start/end of the cruise in System Cruise Setup, detailing the start and end date, arrival/departure time at each port, and the base currency.

Figure 2-3 Cruise Setup

Table 2-1 Cruise Setup Field Definition

Field Name	Description
Description	Short code of the cruise. Mainly use to identify the cruise.
Start Date	The start date of the cruise.
Island Date	Special coded description for General Ledger (GL) Interface.
Itinerary ID	An identifier for the voyage/cruise.
Center ID	Special coded description for GL.
Currency	Official on board currency. See Financial Setup, Currencies

Table 2-1 (Cont.) Cruise Setup Field Definition

Field Name	Description
External Cruise ID	Cruise ID from an external party.
Safety Assembly Time	Schedule Safety Assembly Time for the cruise.

Creating System Cruise

1. Select **System Setup**, then **System Cruise Setup** from the drop-down list.
2. In the Cruise Setup window, right-click the **All Cruises** pane and select **Add Cruise** to open a blank setup form.
3. Enter the **Description**, **Start Date**, **Island Date**, **Itinerary** and **Currency**.
4. Click **Apply** to save.

Adding Port Day to Cruise

1. At the **All Cruises** section of the Cruise Setup form, right-click on the Cruise Name and select **Add New Port/Day**.
2. At the Setup Cruise form, enter the **Date**, **Description**, **Port Comments**, **Weather** and select from the drop-down list the **Arrival Port**, **IPM Port Type**, **Arrival Country**, **Arrival Time** and **Departure Date/Time**.
3. Click **Apply** to save the form.
4. Repeat the above steps for additional port day.

 Note:

You cannot alter the Port Day once the date is entered. You must first remove and re-enter the port day before adding the remaining port day.

Removing Port Day

1. In the All Cruises pane, right-click the **Port Date** you wish to remove.
2. Select the **Remove Port/Day** option.

 Note:

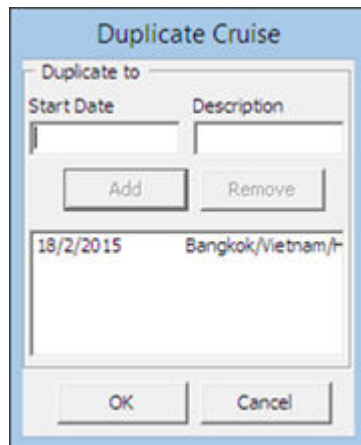
The system validates all reservations against the port day before a port/day or cruise is removed. If there are linked reservations found, amend the booking before proceeding.

Copying Cruise Day

The Copy Cruise function copies the same cruise setup/itineraries into a future date. If the information is completely different, we recommend that you create the cruise from scratch and add the port day individually.

1. In the All Cruise section, select the **Cruise Day**, then right-click and select **Copy Cruise**.

Figure 2-4 Duplicate Cruise



2. Insert the **Start Date** and **Description** in the Duplicate Cruise window, then click **Add**. The copy cruise is not allowed if a Start Date exists.
3. Click **OK** to confirm and populate the information in the All Cruises section.

Removing a Cruise

You can only remove a cruise when there are no reservation records attached to the cruise day. This option is dimmed when the system detects there is a link to a port day.

1. In the **All Cruises** section, expand the **Cruise Day** container and select the **port day** to remove by right-clicking the date.
2. Repeat the above step until all of the port days for that cruise are removed.
3. Right-click on the **Cruise Day** and select **Remove Cruise**.
4. Click **OK** to exit and return to System Cruise setup.

System Date Change

The Night Auditor or appointed user from the Finance Department is responsible for performing the System Date Change nightly. Before you run the **System Date Change**, all revenue centers must be in balance, and this includes the Point-of-Sale (POS) System, Cashbook, and other processes deemed necessary by the ship operator.

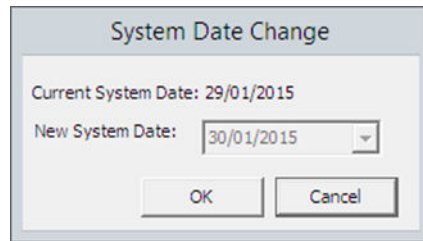
Performing System Date Change

1. From the **System Setup** drop-down menu, select **System Date Change**.

Note:

You are not allowed to proceed when the Cashier's sessions is still active.

2. At the System Date Change prompt, confirm the **New System Date** by clicking **OK**.

Figure 2-5 System Date Change

3. You will receive a warning message when the expected disembarking guest/crew remain as check-in in the system. Select **Yes** to proceed or **No** to return to the previous menu and resolve all pending check outs.
4. When you select **Yes**, a progress window **Closing pay period** appears once the System Date Change commences. It only appears if the Payroll system is linked, and it changes all the pending reservation statuses for the date to *No-Show*.
5. Once the System Date Change completes, you will receive an window indicating the new system date. Click **OK** to close the prompt.

 Note:

Cruise Statistics includes Guest Onboard, Visitor Onboard, Crew Onboard, and Children Onboard count will be displayed as well.

System Cruise Change

At the end of each cruise, all revenue centers and system accounts must be in balance and closed before you start a new cruise. This task is performed by the Chief Purser.

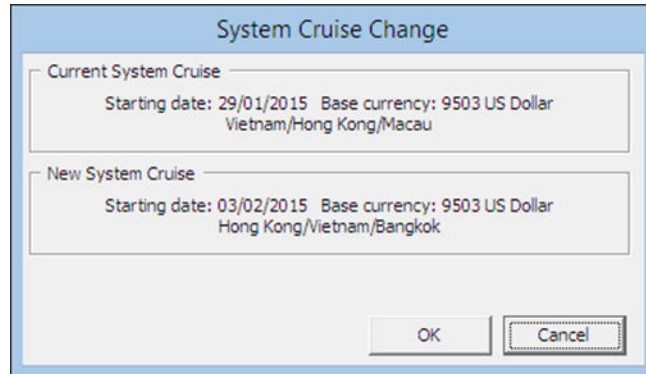
Performing System Cruise Change

 Important:

The following process sets all accounts to **Closed**. All outstanding balances are carried forward to the next cruise. Proceed with caution.

1. Select **System Cruise Change**.
2. At the System Cruise Change prompt, click **OK** to confirm the New System Cruise.

Figure 2-6 System Cruise Change

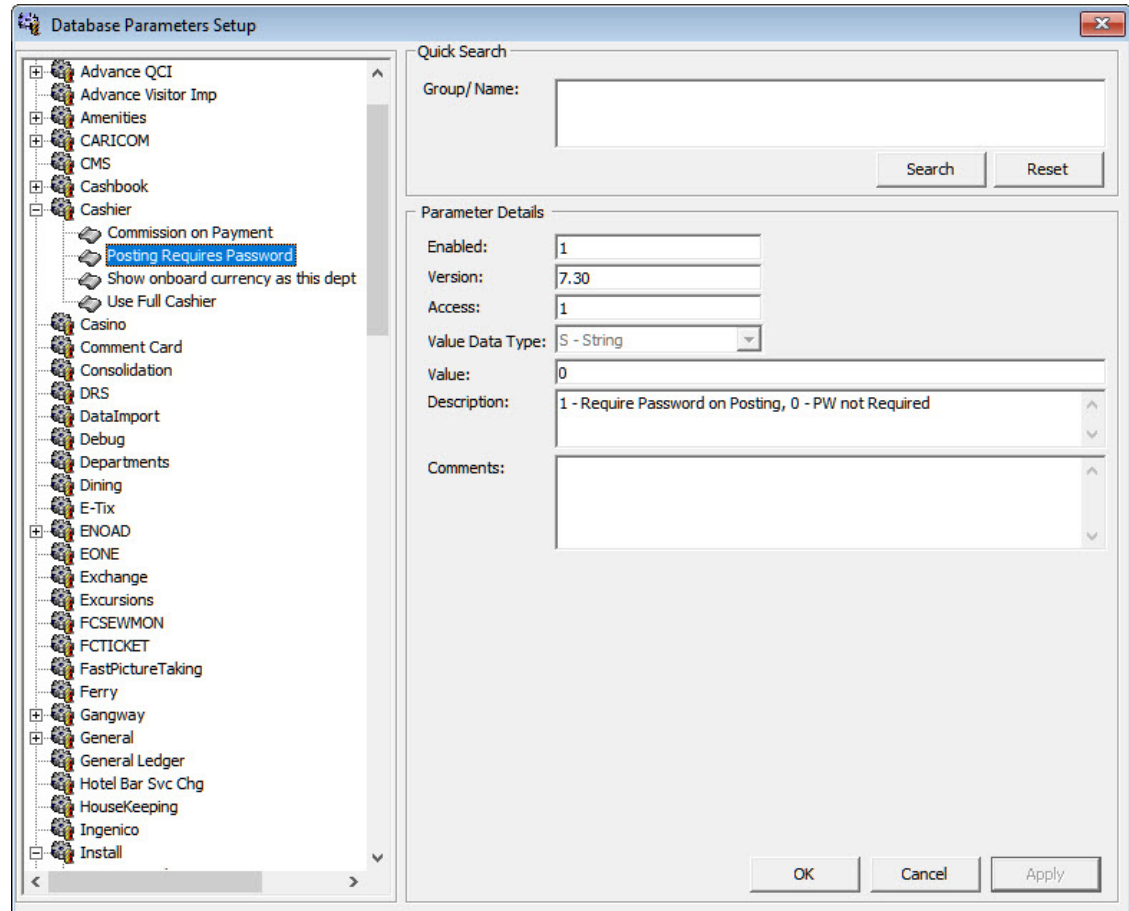


3. You will receive an Open Balance Warning if an unbalanced System Account is detected. Select **Yes** to proceed or **No** to return to the previous menu and resolve all pending check outs.
4. Once the cruise change completes, the application returns to the Main menu.

Database Parameters

The application is deployed with a set of Database Parameters that controls the operability and functionality of the module. These system parameters are grouped by module, followed by their function. Please consult Oracle Hospitality Cruise Customer Support prior to changing any of these parameters to avoid adverse implications.

Figure 2-7 Database Parameter



1. From the **System Setup** menu, select **Database Parameters**.
2. In the Database Parameters Setup window, click the plus (+) key to expand the group or navigate to the **Quick Search** section and search the parameter name in the **Group/Name** field and then click **Search**.
3. Changing the value at the **Parameter Details** changes the behavior of the functions.
 - a. **Enabled:** By default, all parameters are set to Enabled. In order to disable a parameter, change the value to 0 (0 = Disabled/ 1 = Enabled).
 - b. **Value:** The acceptable value is defined in the description.

Defining the Days to Leep Log Files

You can to keep an activity log of certain functions, particularly the Interfaces. The number of days to keep is set up in Database Parameter:

- Group Interface, Days to keep Log File.
- Group Gangway, Gangway Log Days

Once defined, the system checks the log entries when the module starts and purges entries older than the days entered.

Airport Setup

The Airport Setup code is used in the Crew and Management Module, Flight Overview window. It allows you to arrange a passenger or crew arrival pickup or departure drop-off. You can also import an airport list instead of inserting the details manually, and this list must be saved in eXtensible Markup Language (XML) format (IATA_AIRPORT_List.XML) in the Oracle Hospitality Cruise folder.

1. From the **System Setup** menu, select **Airport Setup (IATA)**.
2. In the **Airport (IATA) setup** window, the import commences once it detects the IATA_AIRPORT_List.xml file.
3. Click **Yes** at the Admin prompt to confirm the data to import and then click **OK** when the import is successful.

Adding Airport Code Manually

1. In the **Airport Setup (IATA) setup, All Airport section**, right-click and select **Add New**.
2. Enter a **short code** and description in the Description field.
3. Enter a **comment** in the Comment field, if any.
4. Click **Apply** to save.

Company Entity

This function allows you to enter the company entity of the ship.

1. From the **System Setup** menu, select **Company Entity Setup**.
2. Right-click on the left pane of the form and select **Add New**.
3. Enter all the information in the **Entity Details** section and then click **Apply**.

Figure 2-8 Company Entities Setup

The screenshot shows the 'Company Entities Setup' window. On the left, a tree view displays 'DEM Demo Cruise' with sub-options 'Add New', 'Remove', and 'Set Who Am I'. The main area on the right is titled 'Entity Details' and contains the following fields:

- Entity ID: 186000000117 (with a 'Link to PAR "WHO AM I"' button)
- Code: DEM
- Name: Demo Cruise
- Enabled: True (dropdown)
- FC ID: 186-117
- Record ID: 16
- Type: 1 - Vessel (dropdown)
- Address: (text area)
- City & Country Code: US
- Phone: (text field)
- Fax: (text field)
- Email: (text field)
- Print Order Report ID: (text field)
- License: (text field)
- IDEA Enabled: False (dropdown)

At the bottom right are 'OK', 'Cancel', and 'Apply' buttons.

Table 2-2 Field Definition of Company Entities Setup

Field Name	Description
Entity ID	Company Entity ID, provided by SPMS.
Code	Company or Ship Code.
Name	Company or Ship name.
Enabled	Set to True.
Record ID	Defines the record ID representing an entity.
Type	Type of Entity • 1 = Vessel/Ship • 2 = Headquarter • 3 = Warehouse
Address	Address of entity.
City & Country Code	Country of entity.
Phone	Phone.
Fax	Fax.
Email	Email address.
Print Order Report ID	Print Order Report ID used by Materials Management System (MM).
License	License Code provided by SPMS.
IDEA Enabled	Field use by MMS and is defaulted to False.

Assigning Company ID

1. At the left pane of Company Entity Setup window, right-click the entity name and select **Set Who Am I**.
2. At the confirmation prompt, select **Yes** to update information to Parameter **Who Am I** link.
3. Restart the application for change to take effect.

Time Zone Change

This function enables you to set the ship's clock forward or backward when the ship travels through different time zones, thus recording an accurate crew work hours. This function is only used in the Time & Attendance module.

1. From the **System Setup** option, select **Timezone Change Setup**.
2. At the Timezone Change Setup window, right-click on the left pane and select **Add**.
3. In the Details section, select the **Data** and **Time** from the drop-down list to specify when the time change should take place.
4. Enter the number of hours in the **Change Hours** field and a remark about the change.
5. Click **Apply** to save.

Batch Reports Printing Setup

The Batch Reports Printing enables you to set up a group of reports to print at a scheduled time. It requires the OHC Auto Report application to run at all times.

1. In the System Setup option, select **Reports Batch Printing Setup**.

Figure 2-9 Batch Reports Printing Setup

Batch Reports Printing Setup

Toolbar: Add New, Delete, Save, Undo, Copy, Paste, Refresh, Exit

New Record

☐ Expand All

Batch Parameters

Number: 4

Name: End of Day Reports

Privilege: No Privilege Require

☐ Always Valid

Valid From: 25 January 2014 16:00:00

Valid To: 28 February 2014 22:00:00

Repeat task every: 1 minute(s)

Note: Use the value '0' (mins) for daily task. (If <valid To> date time value is used, this task will be run one time each day until it reach the <Valid To> date time.

Note: Use the value '-1' (mins) for daily task. (If <valid To> date time value is used, this task will be run one time each day on the <valid from> time until it reach the <Valid To> date time.

Note: Use the value '-2' (mins) for system cruise change batch reporting.

2. In the Batch Reports Printing Setup window ribbon bar, click the **Add New** button.
3. Complete all of the required fields and click **Save**.

Adding Report to Batch Printing

1. Select the **Report Group** from the Batch Printing tree.
2. In the Report Parameters tab, select an **Action Type** from the drop-down list.

Table 2-3 Batch Report Printing Options

Option	Description
1 – Skip	Option to skip the selection process.
2 – Report	Enable a search option and report selection from existing report database.
3 – External Program	The function calls an external program when running the Batch Report. Only external program defined in the General, External Program List parameter is allowed to be saved.
4 – Call Batch Printing	Enable in order to link and include existing report group in the current.

3. In the Report Name field, click **Search** to locate the report.
4. Select the day of the week from the **Schedule** drop-down field.
5. Select the **Output** method from the drop-down list. If the selected methods is to save to file, enter the **Export File name and path** and **Email Address** for the files to be sent to the specific user.
6. Click **Save** at the ribbon bar to save.

Copying Batch Details to Other Report

1. Select the Report Group from the tree and then click the **Copy** button at the ribbon bar.
2. In the Report Group to copy to, click **Add New** and then **Paste**.
3. Click the **Save** button to save.

Deleting Batch Report Details

1. Select the Report Group from the Batch Printing tree and then click **Delete** button at the ribbon bar.
2. At the confirmation prompt, click **Yes** to proceed.

Note:

This action deletes the record permanently. Please proceed with caution.

Reports Setup

The Report Setup function allows you to add customized Crystal reports to the existing System report set, or export the report template for use on another ship or for further customization.

Figure 2-10 Report Setup

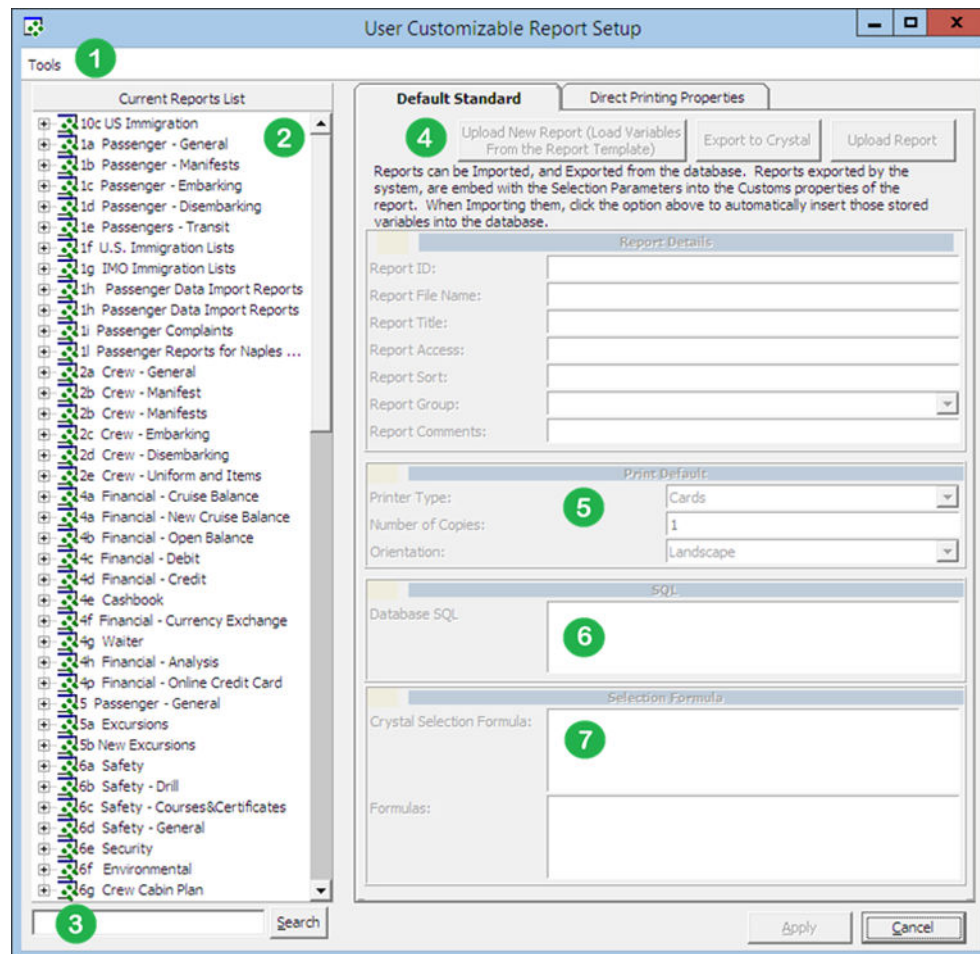


Table 2-4 Setup Functions In Report

Figure	Description
1	Tools function that uploads report templates from a public folder.
2	List of report sets available, including those manually uploaded.
3	Search function that enables you to search for a report.
4	Report detail of the report. For example, Report ID, User Access, Report Group.
5	Default printer configuration.

Table 2-4 (Cont.) Setup Functions In Report

Figure	Description
6	Formula embedded in the Crystal Report template.
7	Selection criterion input required from the user prior to generating a report.

Adding New Report

1. From the **System Setup** option, select **Reports Setup**.
2. In the User Customizable Report Setup, Current Report List pane, right-click and select **Add New Report** to enable the fields on the right pane.
3. Navigate to the right pane and select **Upload New Report (Load Variables From the Report Template)** or **Upload Report**.
4. Search for the .RPT file on your local drive if you are uploading a report template.
5. In the Report Details section, enter the following information:
 - a. **Report ID:** Unique ID of customized report.
 - b. **Report File Name:** Crystal Report file name, for example, pabxnationbreak.rpt.
 - c. **Report Title:** Report name to show in Current Report List.
 - d. **Report Access:** User Access Right to view/print report.
 - e. **Report Sort:** Sort order of the report within the assigned report group.
 - f. **Report Group:** Group this report belongs to. Select from the drop-down list.
 - g. **Report Comments:** Additional comments/Information pertaining to this report.

Figure 2-11 Default Standard for Report

Default Standard | Direct Printing Properties

Upload New Report (Load Variables From the Report Template) | Export to Crystal | Upload Report

Reports can be Imported, and Exported from the database. Reports exported by the system, are embed with the Selection Parameters into the Customs properties of the report. When Importing them, click the option above to automatically insert those stored variables into the database.

Report Details

Report ID:
Report File Name:
Report Title:
Report Access:
Report Sort:
Report Group:
Report Comments:

Print Default

Printer Type:
Number of Copies:
Orientation:

SQL

Database SQL:

Selection Formula

Crystal Selection Formula:
Formulas:

File loaded: paxbynationbreak.rpt | Add New Report | Save | Cancel

6. In the Print Default section, select the **Printer Type**, **Number of Copies** and the **Print Orientation**.
7. Click **Save** to add the report to the list.
8. Click **OK** at the Save New Report prompt. The newly added report name appears at the bottom of the screen

Removing a Report

1. In the User Customizable Report Setup window, expand the **Current Report List** tree by clicking the plus (+) key.
2. Right-click the **report name** you wish to remove and then select **Remove Report**.
3. Click **Yes** when prompted.

Exporting a Report

1. In the User Customizable Report Setup window, expand the **Current Report List** tree.

2. Click the **Export to Crystal** button in the **Default Standard** tab.
3. Select the **location** to save the file and note that the file type is indicated as Crystal Report.

Change Debark/Embark Date

This function allows you to change the Debark or Embark Date when the need arises, for example, if passengers are not allowed to debark due to severe weather conditions.

1. From the **System Setup** option, select **Change Debark Date** or **Change Embark Date**.
2. Select the date from the **From/To Date** field and check the applicable passenger type and the status.
3. Select a **New Date** and check the **Reset Boardcards** check box if you need to issue new boardcard.
4. Click **OK** and then select **Yes** to proceed or **No** to abort.

Labels Setup

The system is pre-installed with a range of hard coded labels for use in various functions. You can modify the description of the labels to suit the ship's operation. Consult Oracle Hospitality Cruise Support if you wish to change the description of these labels.

3

Financial Setup

In the Financial Setup function, you can create and manage the Ship's accounting codes, ensuring the daily revenues/expenses are correctly mapped to the codes configured. A greater financial reporting can be achieved through a well thought out system of accounts. It is highly recommended for shore side accounting personnel to play a key role in creating/developing the accounts and to revisit this setup from time to time. Configuration of these codes is under the responsibility of the System Administrator, Chief Purser, and Accounting Purser.

Department Codes

The Department Codes is where all debit and credit posting codes are stored, and codes entered are mapped to the Back Office Accounting System using the General Ledger (GL) ID. These codes are sub-divided into several codes within a Main Group.

Figure 3-1 Main/Sub-Department Setup

The screenshot displays the 'Main/Sub-Department Setup' window. It features two tabs: 'Main Department Setup' and 'Sub-Departments Setup'. The 'Main Department Setup' tab is active, showing a list of department codes and descriptions. The 'Sub-Departments Setup' tab is also visible, showing a list of sub-department codes and descriptions. Below the lists, there are input fields for 'Sub Department Auto Gratuity/%', 'Sub Department Manual Gratuity/%', '% Server 1', '% Server 2', and '% Pool'. The window includes standard buttons for 'New', 'Edit', 'Delete', 'Hide', and 'Close'.

Dept Code	Description
1010	Cabin Upgrade
1011	Cabin Change
1500	
2000	
2010	
2020	
2030	
2040	
2050	
2060	
2070	
2080	
2090	
3000	
3010	
3020	Room Service

Sub-Dept Code	Description	POS Revenue Center	POS Sales Itemizer	Acc GL Origin	Acc GL Dept	Acc GL Control Acc	Acc GL SubAccount
2031	Beverages	21	1				
2032	Champagne	21	2				
2033	Food	21	3				
2034	Tobacco	21	4				
2035	Package	21	5				
2036	Service Charge A.	21					
2037	Sales Commission	21					

Sub Department Auto Gratuity/% /0.00%
Sub Department Manual Gratuity/% /0.00%
% Server 1 0.00%
% Server 2 0.00%
% Pool 0.00%

Main Department

The Main Department code is the higher level of grouping of the approved Chart of Account and in this instance, the revenue or cost centers. The Main Department Setup is comprised of two tabs: a Debit and Credit tab. In general, the Debit departments are the revenue centers and outlets, while the Credit department represents the payment methods accepted by the Ship. All codes are entered through **Administration, Financial Setup, Department Codes**.

Adding a Main Department Code

1. From the **Administration, Financial Setup** menu, select the **Department Codes** option.
2. Select either a **debit** or a **credit** tab.
3. Click the **New** button located at the bottom of the screen.
4. Enter the **code**, **description**, and other required fields approved by your Financial Department and then click **OK** to save.

Table 3-1 Main Department Code

Field	Description
Code	Department code in numeric character.
Description	Description or name of the code.
Other Description	Alternative name or other description of the code, if any.
Sub-Department Code	Pre-defined Sub-Department code of Automatic Service Charge.
Percentage to distribute	Percentage value of Automatic Service Charge to distribute.
% for Team Server 1	Percentage of Service Charge to distribute by Team.
% for Team Server 2	Percentage of Service Charge to distribute by Team.
% for Pool Distribution	Percentage of Service Charge to distribute from Service Charge Pool.
External ID	Department Location ID.
Credit Limit	Overall Floor Limit Allowed.

Deleting a Main Department

1. From the Main Department Codes setup, select the **code** and then click the **Delete** button.
2. At the confirmation prompt, click **Yes** to proceed.

Note:

Once a code is used and has transactions linked, you are not allowed to delete it. You can hide the code using the **Hide** button.

Sub-Department

You can only add a Sub-Department when the the Main Department code is present. The information required in a debit sub-department code defers from the credit sub-department code, although the process to create them is similar.

Table 3-2 Debit Sub-Department Field Definitions

Field Name	Description
Type of Posting	System coded posting type: Posting Department (D) or Tax Department (DX).
Department Code	Department Code in numeric characters only.
Description	Description of the code.
Other Description	Additional description of the code, if any.
Department Grouping	Code use to group certain department codes for reporting purposes.
POS Revenue Center	Revenue Center code defined in POS System, use in Interface mapping.
POS Sales Itemizer no	Sales Itemizer number defined in POS system.
POS Sales Period	Sales Period defined in POS.
POS Revenue C.Desc	Revenue center description from POS System.
D.Code for Gratuities M.	Manual Service Charge Department Code.
D.Code for Gratuities A.	Auto Service Charge Department Code.
D.Code for Taxes	Department code for taxes, use in Interface mapping.
Gratuity Typ	Not in Use.
Gratuity/Service Tax Department	Not in Use.
PBX Call Type	Call charge type from PBX System, use in Interface mapping.
Max. Daily Limit	Maximum Daily Limit allowable for this code.
Service Charge Dept.	Service Charge Department for Casino postings.
Service Charge	Service Charge Value.
Max. Cruise Limit	Maximum Cruise Limit allowable for this code.
Req. Signature During Folio Payout	Define whether signature is required on folio payout.
Guest/Crew Discounts Dept.	Applicable discount department code.
Dept. Security Level	Defined User Security Access Level 1 – 9.
Eligible Department	Check box that determines the department is not eligible for refund.
Origin	General Ledger codes defined in Chart of Accounts.
VAT Tax Class	Classification of VAT Tax.
Casino Department	Determines whether the department code belongs to Casino.
Exclude from Revenue Overview	Revenue to be excluded from Revenue Overview function in Management.

Table 3-3 Credit Sub-Department Field Definitions

Field Name	Description
Payment Type	The payment type of this code. For example, Cash, Foreign Currency, Credit Card, Check, Cabin Charge, City Ledger.
Department Code	Department Code in numeric characters only.
Description	Description of the code.
Other Description	Additional description of the code, if any.
Department Grouping	Code used to group certain department codes for reporting purposes.
Credit Card Digits	Acceptable credit card digits associated with the type of credit card.
Credit Card ID	Short code of credit card type.
Credit Card Internal ID	Internal credit card ID preset by the system.
Credit Card Merchant ID	Card Merchant ID.
Foreign Currency Code	ISO Currency codes. Refer to Typ_Cur when the payment type=CF Foreign Currency.
Floor Limit	Maximum limit allowed in guest account for this card type.
Crew Floor Limit	Maximum limit allowed in Crew account for this card type.
Minimum Authorization Value	Minimum amount to obtain from card merchant.
Commission Department	Department code for chargeable commission.
Commission Rate	Percentage of applicable commission or value defined if 'Commission is fix value' is checked.
Daily Limit	Daily Posting limit.
Debit Card No Commission	Commission is exempted if checked.
Commission is fixed value	Applicable commission is value based instead of percentage.
Auto Balance (Interface)	Auto Balance function for cash/credit card posting via interface.
Rewards Card	Denotes Rewards Card if checked.
Gift Card	Denotes Gift card if checked.
POS Tender Type No.	Tender Media Number defined in POS System.
System Account No.	The Account Number defined in System Account.
Incentives Payout Group	Incentive payout group setup from Crew Incentive.
External Department ID	External Department ID for payment from 3rd party system.
External Itemizer ID	External Itemizer ID from third-party system.
Allow Posting to Guest Cabin	Posting allowed by Micros POS System.
Allow Posting to Crew Cabin	Posting allowed by Micros POS System.
Allow Posting to Gift Card	Posting allowed by Micros POS System.

Table 3-3 (Cont.) Credit Sub-Department Field Definitions

Field Name	Description
G.Ledger Id.	General Ledger codes in Chart of Accounts.
Eligible Department	If the check box is checked, the department is not eligible for refund.
Dept. Security Level	Defined User Security Access Level 1 – 9.
Req. Signature During Folio Payout	Define whether signature is required on folio payout.
Credit Card Disclaimer Note	Disclaimer note to print on invoice when payment is by credit card.
Department for routing	Payment Type allowed for routing.

Adding a Debit Sub-Department

1. From the **Main Department Setup** window, select the **Debit tab** and then the **Department Code**.
2. Click **New** to open the Debit Department Code Setup form.
3. Enter the **code**, **description**, and other required fields approved by your Financial System.
4. Click **OK** to save.

Adding a Credit Sub-Department

1. From the **Main Department Setup** window, select the **Credit tab** and then the **Department Code**.
2. Click **New** to open the Payment Setup form.
3. Enter the **code**, **description**, and other required fields approved by your Financial System.
4. Click **OK** to save.

Note:

No posting is allowed when a credit code does not have a floor limit assigned or the value is 0.00. The General, Check Buyer Limit, and Check Credit Limit parameters are used to validate and manage the credit limit during posting.

Deleting Sub-Department Code

1. From the Main Department Setup window, select the **Sub-Department** to delete.
2. Click the **Delete** button located at the bottom of the screen.
3. At the confirmation prompt, select **Yes** to delete the code.

 Note:

It is not possible to delete a code that has a transaction linked to it. Once the code is deleted, is not reversible. If the code is no longer in use and deleting is not possible, use the **Hide/Show** function to disable them.

Currencies

The Currencies functionality enables you to input the currency rate used in the Currency Exchange module. You can also update the exchange rates from the Currency Exchange module. The feature uses the Currency Codes configured in Credit Sub-Department.

Adding Currency Rate

1. From the **Financial Setup** menu, select **Currencies**.
2. In the All Currencies section, right-click and select **Add Rate**.
3. Navigate to the Setup Exchange Rates section and select the currency code from **Currency/Check** drop-down list.
4. Enter the **Valid From date, Minimum Denomination (Buy/Sell)** and select the **Rate Calculation** method from the drop-down list.
5. Selecting the **Disable From** check box disables the currency from appearing in the Currency Exchange module from the date specified. Disabled currency is marked with an asterisk *.
6. Enter the **Available Notes**, if any. If you specify Available Notes, the system uses the Available Notes for calculation and ignore the Minimum Denomination setup.
7. Enter the **Exchange Rates and Commission %** or **Min. Commission**, then click **OK** to save.

Removing Currency Rate

You can remove currency rates by right-clicking the currency rate and selecting **Remove Rate**.

Merchant Details

For every credit card provider the Sship deals with, you must create a Merchant credential to facilitate the credit card authorization and handling. Such information is provided by the third-party service provider.

1. From the Financial Setup menu, select **Credit Card Merchant Setup**.
2. On the left pane of the setup screen, right-click and select **Add New**.
3. Select the **Credit Card Type** and **Currency** from the drop-down list.
4. Enter the **Terminal ID, Bank ID, Decimal, IP Port, Merchant Login ID** and **Merchant Password**.
5. Click **OK** to save.
6. Repeat the above steps for other credit card types accepted by the merchant.

Pre-Selection Groups

The Pre-Selection Groups allow you to categorize numerous department codes into a group, for use in Routing and Discount assignments.

1. From the **Financial Setup** menu, select the **Department Groups Setup**.
2. On the left pane of the setup screen, right-click and select **Add Department Group**.
3. In the **Department Groups** section, enter the **Description** of the group and the **Department Codes**.
4. Click **OK** to save.

Stateroom Upgrade Setup

In the Stateroom Upgrade Setup functionality, you can create a price table and manage the price differences to charge when performing a cabin upgrade.

1. From the Financial Setup menu, select **Stateroom Upgrade Setup**.
2. In the Price Table of the Upgrades screen, click **New**.
3. In the **Edit Upgrade Prices** window, select a **category** from the Category Identifies.

 Note:

The Cabin Categories only appear if they are set up in Stateroom setup. Sorting the category pricing from higher to lower is recommended.

4. Enter the **Sorting, Price** and **Maximum Person** allowed.
5. Click **OK** to save.

Discount Templates

The Discount Templates functionality enable you set up various discount type templates, for use in Discount, Routing and Package Handling.

1. From the **Financial Setup** menu, select **Discount Templates**.
2. On the left pane of the setup screen, right-click and select **Add New**.
3. Navigate to the Fidelio Department section and then click **Add**. This launches the Discounts window.
4. In the Discounts window, enter the **Percentage, number of count to apply** in the How Much section. When the Percentage check box is deselected, the discount becomes a value based discount. If the **Apply Count** field is blank, the discount is unlimited.
5. Select the applicable **Department Code** and then click **OK** to apply.

Quick Posting Template

This Quick Posting Template enables you to create a criteria filter to be used in the Quick Posting function of the Cashier Function, for example, a posting to a specific nationality.

1. From the Financial Setup menu, select **Quick Posting Templates**.

2. On the left panel of the setup screen, right-click and select **Add New**.
3. Enter the **short code** and **description** in the Description field and then insert the criteria in the **Comments** field.
4. Click **OK** to save.

Import Credit Card Bin

You can import a complete set of eligible Bank Identification Numbers (BIN) provided by the credit card provider by overriding the previously loaded BIN information during the reload process.

1. From the Financial Setup menu, select **Import Credit Card Bin** file.
2. At the bottom of the screen, select the **BIN file** to import.
3. By default, all the check boxes are selected. Click **Import** to save the information into the BIN table.
4. Click **Close** to exit.

Disallow Manual Posting Applications

Use this function to prevent users from manually posting a transaction through the listed application when the posting is set to *No* in the guest account.

1. From the Financial Setup menu, select **Disallow Manual Posting Applications**.
2. Right-click on the left pane and select **Add New**.
3. Enter a **short code** and the **application name** in the Description field.
4. Click **Apply** to save.

Department Grouping

This function allow you to categorize a department group for use as financial classification and in report grouping.

1. From the Financial Setup menu, select **Department Grouping**.
2. Right-click the left pane and select **Add New**.
3. Enter a **short code** and **description** in the Description Field and then click **OK** to save.

VAT Handling

Before you use VAT Handling, these VAT components must be in place.

- VAT Tax Class.
- VAT Tax Rate.

VAT Tax Class

The VAT Tax Class is a tax group classification, for example, a Regular Tax, Reduced Tax, and others.

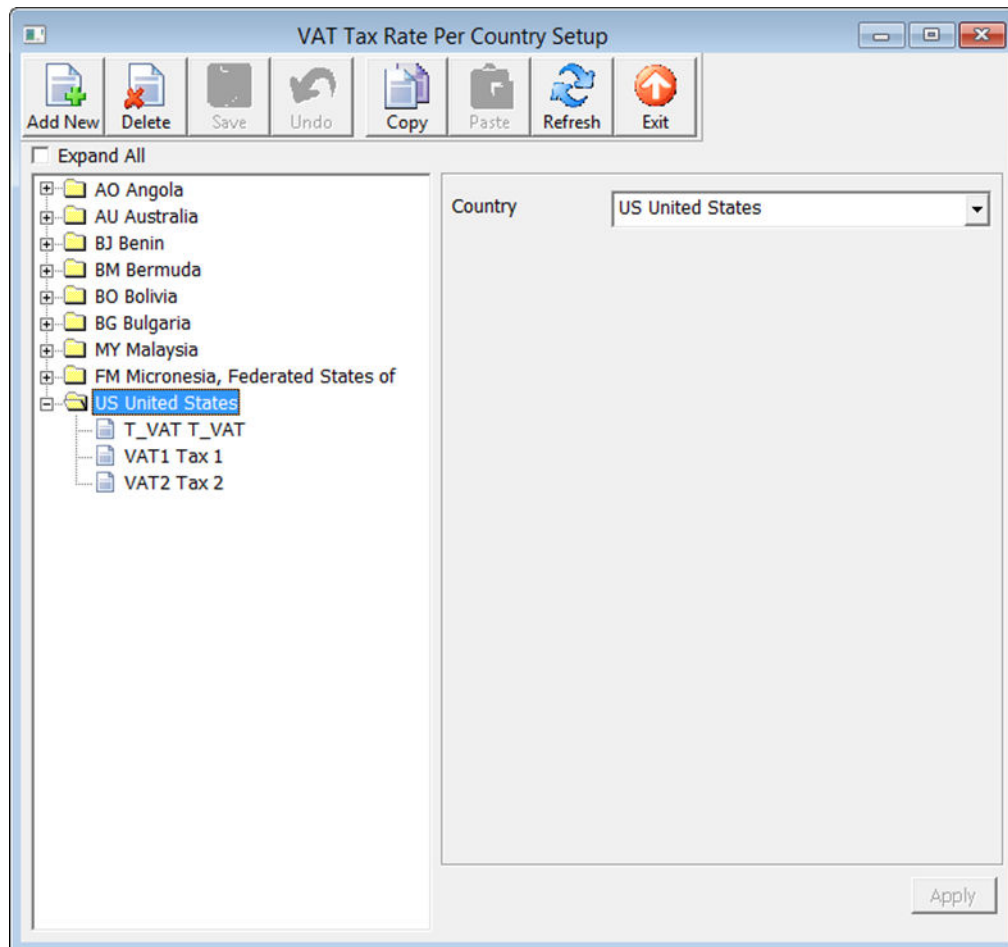
1. From the Financial Setup menu, select **VAT Tax Class**.
2. On the left pane of the setup screen, right-click and select **Add New**.

3. Enter the **short code** and the **application name** in the Description Field and click **Apply** to save.

VAT Tax Rate

The VAT Tax Rate code is used to define the various tax rates applicable to each country or class, and the tax posting code.

Figure 3-2 VAT Tax Rate Per Country Setup



1. From the Financial Setup menu, select **VAT Tax Rate**.
2. Click **Add New** at the ribbon bar and then select the **Country** code from the drop-down list.
3. Click **Save**.
4. Expand the **Country** container and select the **Tax Class**.
5. Insert the **tax rate** in the VAT Tax Rate field and select the **Tax Department** code from the drop-down list.
6. Click **Save** to save the changes.

Activating a Tax Rate

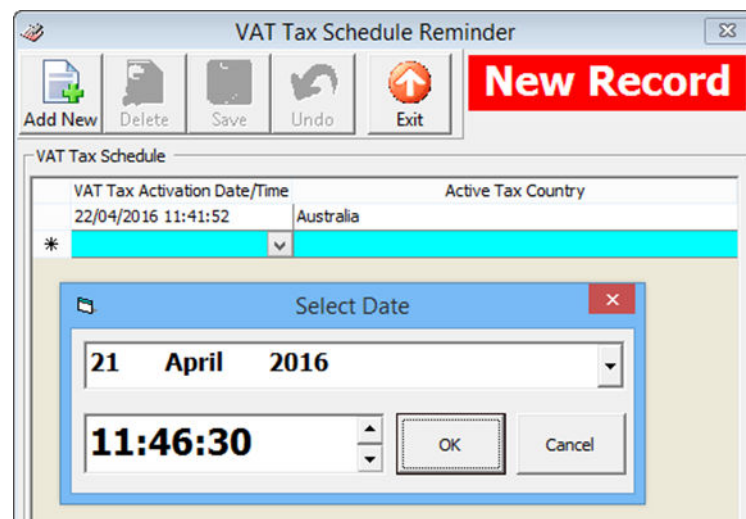
This function enable you to apply the correct Tax Rate based on the cruise location and stores the information in **Parameter, “General”, “Current VAT Tax Country”**. A system restart is required on all posting modules for changes to take effect.

1. From the Financial Setup menu, select **Activate Tax Rate**.
2. Select the country tax to activate from the drop-down list and then click **OK**.
3. At the confirmation prompt, select **Yes** to activate.

VAT Tax Reminder

A reminder can be added to remind you when to activate the tax country on a specified date.

Figure 3-3 VAT Tax Reminder



1. From the Financial Setup menu, select **VAT Tax Reminder**.
2. Click **Add New** at the ribbon bar, and then select the **Date and Time** from the drop-down list.
3. From **Active Tax Country**, select the **Country** in which the tax is to be activated.
4. Click **Save** to save and exit.

4

Itinerary Setup

The Itinerary Setup enables you to plan the daily activities available for each voyage by Location, Events, Packages or through an Agent. The information entered here appears as an information board in the Management, Itinerary Overview, and are entered through **Administration, Itinerary Setup**.

Adding an Activity

Figure 4-1 Activities Setup

The screenshot shows the 'Activities Setup' window. On the left, a tree view under 'All Activities' shows a hierarchy: '29/01/2015 Vietnam/Hong Kong/Macau' > '31/01/2015 A' > '31/01/2015 Embarkation Day' > '15:00 High Tea', '16:00 Pie Making Class', '16:00 Indoor Games', '16:30 Pottery Class', '18:00 Pre-dinner Cocktail', '19:30 Dinner', '01/02/2015 Island Tour at Danang', and '09:00 Snorkelling'. A context menu is open over the '09:00 Snorkelling' activity, showing options: 'Add Activity', 'Copy Day/Activity', 'Remove Activity', 'Add Package/Price', 'Remove Package/Price', 'Add Team/Time Frame', and 'Remove Team/Time Frame'. The right pane shows the 'Setup Activity' form for 'Snorkelling'. The 'Event Details' section includes 'Type/Title' (Active Programr), 'Language' (EN English), 'Title' (Snorkelling), and 'Description' (Snorkelling). The 'Time and Place' section includes 'Start DateTime' (01/02/2015 09:00), 'Duration Time' (60 minutes), 'Deadline DateTime', 'Setup Time' (10 minutes), 'Dates Accuracy' (All Accurate), 'Clean-up Time' (10 minutes), 'Location' (Castaway Beach), and 'Comments'. The 'Reservations' section includes 'Waiting List' (No waiting list), 'Booking Status' (Enabled), 'Booking Options' (Booking Required), and 'Min/Max Available' (5/20). The 'Pricing' section includes 'Agent/Vendor' (does not apply), 'Adult Cost Price', 'Department' (does not apply), and 'Child Cost Price'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

Table 4-1 Field Description of Activities Setup

Field Name	Description
Type/Title	The type of activity and title.
Language	The language offered in this activity.
Title	Title of the activity.
Description	Brief description of the activity.
Start DateTime	Start date and time of the activity.

Table 4-1 (Cont.) Field Description of Activities Setup

Field Name	Description
Duration Time	Duration of the activity.
Deadline DateTime	Booking deadline date/time.
Setup Time	Setup time required in minutes.
Dates Accuracy	Activity dates accuracy (1-All Accurate, 2-All Approximate, 3-Starting Approx., 4-Duration Approx.).
Clean-up Time	Clean up time in minutes
Location	Location of the activity
Comments	Comments for the activity
Waiting List	Waiting List is allowed/disallowed.
Booking Status	Activity booking status (Enable/Disable).
Booking Options	Activity booking options — Booking is required or not.
Min/Max Available	Minimum or Maximum number of bookings allowed.
Agent/Vendor	Agent/Vendor Name.
Adult Cost Price	Agent/Vendor Cost Price.
Child Cost Price	Agent/Vendor Cost Price.
Department	Agent/Vendor Posting Department.

1. From the **Itinerary Setup** menu, select **Activities**.
2. On the left pane, right-click on the selected **Cruise Day**.
3. Select **Add Activity** from option menu.
4. In the Setup Activity section, update all of the activities details.
5. Click the **More Details** button to insert the Meeting Date/Time, clothing requirements, and other information, and click **OK** to return to previous screen.
6. In the Reservation section, select the appropriate **booking options** from the drop-down list.
7. Enter the **pricing** and select the **Agent/Vendor** providing the service.
8. Click **OK** to save.

Copying an Activity Setup

An existing activity can be copied into the future cruise by day or by activity instead of re-creating every single activity.

1. From the Activities setup window, right-click on the **Cruise Day** and select **Copy Day/Activity**.
2. In the Duplicate whole day window, enter the **date to copy to**, and click **Add**.
3. Click **OK** to copy the activities.

 Note:

To copy a single activity, select an Activity instead of by Cruise Day.

Add Package Price

The Add Package/Price is an additional information field for the activity is not meant for posting.

Adding Team/Time Frame

You can add the team member required to handle the activities by indicating the time and number of the member required.

1. In the **Activities Setup** window, right-click on the activities details and select **Add Team/Time Frame**.
2. In the Team/Time Frame section, enter the number of the **team member** and select the time to reserve from and duration.
3. Click **OK** to save.

Removing an Activity

Activities that are no longer required or have been added as duplicate can be easily removed by right-clicking on the **activity** and selecting **Remove Activity**. If the activity has a **Team/Time Frame** or **Packages/Price information**, you must remove these before removing the activity.

5

Events

The section describes the setup of an activity category, its location, and requirements.

Figure 5-1 Event Setup Screen

Table 5-1 Event Setup Field Definition

Field Name	Description
Number	Order Number of the event.
Language	Language used in the event.
Title	Event Title.
Description	Short description of the event.
Location	Location of the event.
Type	Type of event.
Ticket	Determine if the event is ticket based or not.
Comments	Additional comments of the event.
Age Range	Age Range, if any.
Age Restriction	Age Restriction, if any.
Family Status	Family Status of attendees, if any.

Table 5-1 (Cont.) Event Setup Field Definition

Field Name	Description
Marital Status	Marital Status, if any.
Gender	Target gender, if any.
Group	Group name for special event.

Adding an Event

1. From the **Itinerary Setup** drop-down menu, select **Events**.
2. In the **All Events** section, right-click and select **Add Event Type**.
3. Enter a short code and description in the **Description** field and then click **OK**.
4. Select the **Event Type**, then right-click and select **Add Event**.
5. In the Details section, enter the **event number**, **title**, and **description** of the event.
6. Select a **Location**, **Type**, and **Ticket** from the drop-down list.
7. In the **Demographics** section, enter the **Age Range** and select the **Family Status**, **Marital Status**, **Gender**, and **Age Restriction** from the drop-down list.
8. Click **OK** to save the entry.

Setting Up Event Location

The Location is used to describe the location where event/activity is held.

1. From the Itinerary Setup menu, select **Locations**.
2. In the All Locations section, right-click and select **All Location**.
3. In the Setup Location Section, enter a **code** and description in the **Title** field, select the **Deck** from the drop-down list and attach a **picture**, if any.
4. Select the **Availability Status** and appropriate **prompt** to use for an overbooked location and click **OK** to save.
5. Select the **Location**, then right-click, and select **Add Table/Seat**.
6. In the Details section, enter the even number, title, and description.
7. Select a **Location**, **Type** and **Ticket** from the drop-down list.
8. In the Demographics section, enter the **Age Range** and select the **Family Status**, **Marital Status**, **Gender** and **Age Restriction** from the down-down list.

Adding Event Table/Seat

1. In the Location Setup window, right-click on the **location**.
2. Click **Add Table/Seats**.
3. Fill in all the fields.
4. Click **OK** to save.

Adding an Event Exception

1. At the Location Setup window, right-click and select **Add Exception**.
2. Fill in the information and select the **Reason** from the drop-down list.
3. Click **OK** to save.
4. Locations that have an exception are marked with an Exclamation mark.

6

Vendors

The Vendors/Agents Setup is used for storing contact information of vendors/agents handling the events.

Figure 6-1 Agents/Vendors Setup

The screenshot shows the 'Agents/Vendors Setup' window. On the left is a tree view labeled 'All Agents' with a few icons. The main area is divided into two tabs: 'Agent Details' (active) and 'Comments'. The 'Agent Details' tab contains the following fields:

- Salutation: MR
- First/Name: [text input]
- Company: [text input]
- Street: [text input]
- Zip/City: [text input]
- State/Country: [dropdown menu]
- Phone/Fax: [text input]
- E-Mail: [text input]
- Comments: Handle ground travel and local tours, operating with 10no, 30 seater buses.
- Status: ☒ Enabled
- Currency: (not applicable) [dropdown menu]
- Exchange Rate: [text input]

At the bottom right are three buttons: OK, Cancel, and Apply.

Setting Up a Vendor

1. From the Agents/Vendors Setup window, right-click and select **Add Agent**.
2. Enter the **Agents details** and then navigate to the **Comments** tab to add the additional comments or document image.
3. In the Comments tab, click **Add Comment** to enter a new comment and the relevant details.
4. Navigate to the Document tab to upload, scan or export an image file.
5. Click **Save**.
6. Click **OK** to save the Agent details.

7

Safety Setup

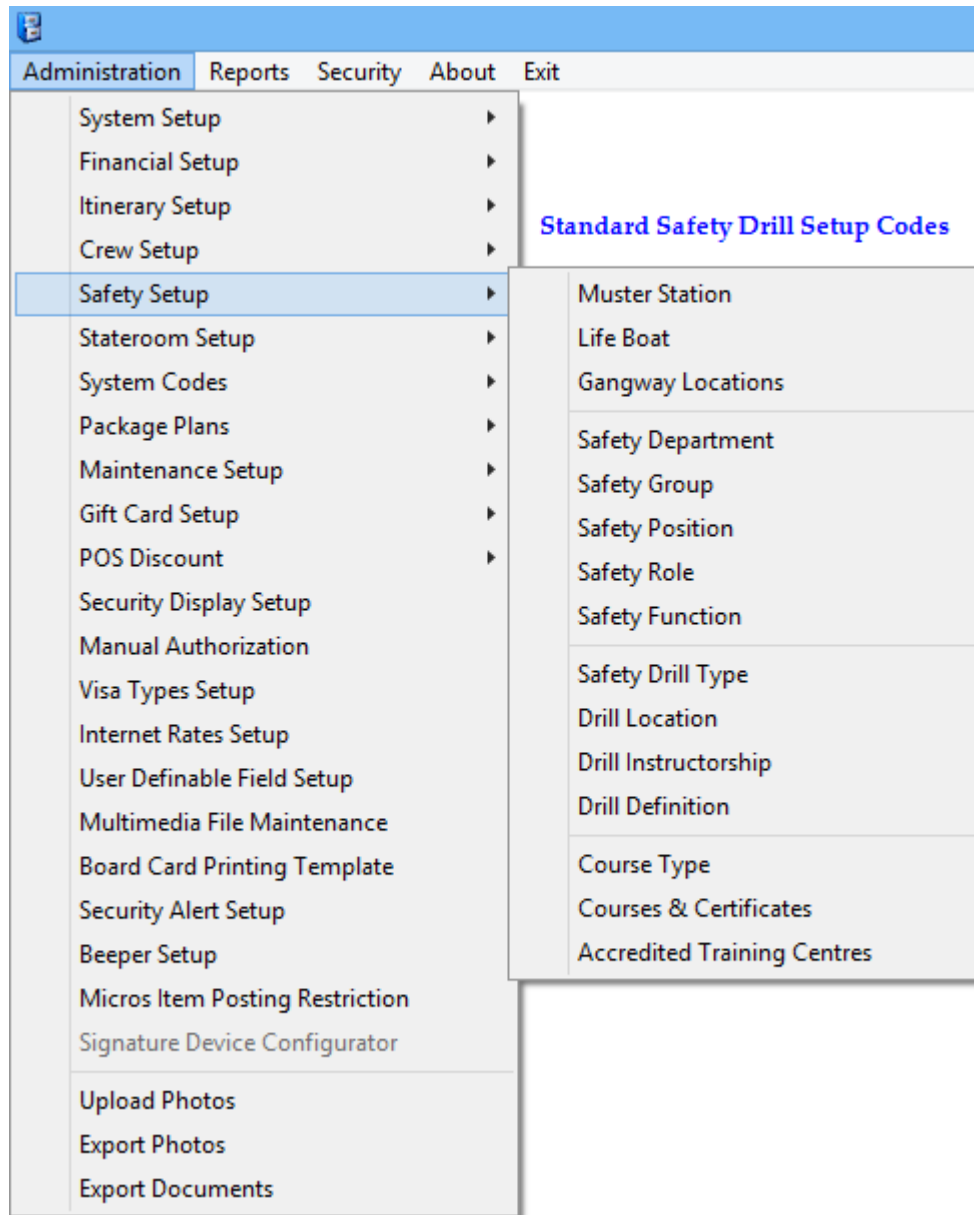
The Safety Setup contains all the codes required in Standard Safety Drill and Advance Safety Drill modes. The setup varies depending on the mode defined in **Parameter group, Safety, Advance Safety Drill** (0=Standard Safety Drill / 1 = Advance Safety Drill).

Safety Setup Type

In the following figures, you will see the list of codes available to Standard Safety Drill and Advanced Safety Drill mode.

Below are the function codes available to Standard Safety Drill mode where **Parameter, Safety, Advance Safety Drill** are set to zero.

Figure 7-1 Standard Safety Drill Setup Codes



Below are the function codes available to Advanced Safety Drill mode where **Parameter, Safety, Advance Safety Drill** are set to one.

Figure 7-2 Advance Safety Drill Setup Codes

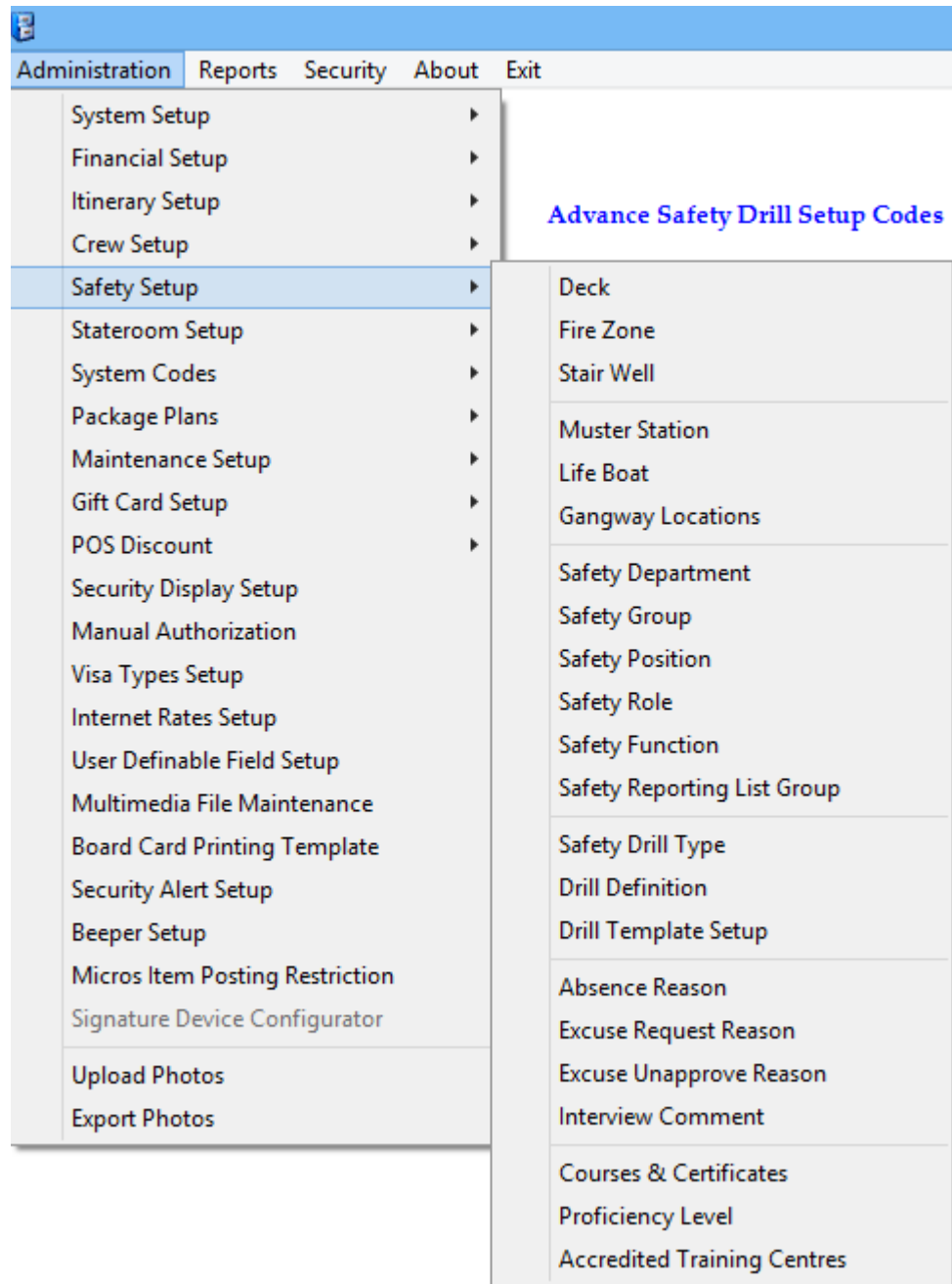


Table 7-1 Safety Setup Configuration Codes

Function Name	Definition
Deck Setup	Define the deck location in Muster Station Setup. Available in Advance Safety Drill.
Fire Zone Setup	Define the Fire Zone for the drill in Muster Station Setup. Available in Advance Safety Drill.
Stair Well Setup	Define the stairwell location in Muster Station Setup. Available in Advance Safety Drill.

Table 7-1 (Cont.) Safety Setup Configuration Codes

Function Name	Definition
Muster Station Setup (definable label - TYP_LBL = SFTMST)	Define the assembly location.
Lifeboat Setup (definable label - TYP_LBL = SFTBOT)	Define the lifeboat or life raft capacity.
Gangway Locations	Define the location of gangway.
Safety Department (definable label - TYP_LBL = SFTDIV)	Define the department responsible for safety for each location.
Safety Group (definable label - TYP_LBL = SFTSGP)	Define the responsibilities and task of each safety group.
Safety Position (definable label - TYP_LBL = SFTCRW)	Define the position of the crew.
Safety Role (definable label - TYP_CLBL = SFTROL)	Define the role of the safety crew.
Safety Function (definable label - TYP_LBL = SFTFCT)	Define the role of crew in command of Survival Craft.
Safety Drill Type	Define the type of drills.
Drill Location	Define the location of the schedule drill. Available in Standard Safety Drill only.
Drill Instructorship	Define the instructor responsible for the scheduled drill. Available in Standard Safety Drill only.
Drill Definition	Definition of drills.
Drill Template Setup	Template for each drill type.
Absence Reason	Absent reason from attending safety drill. Available in Advance Safety Drill only.
Excuse Request Reason	Reason to be excused from attending safety drill. Available in Advance Safety Drill only.
Excuse Unapproved Reason	Reason for not approving the excuse request. Available in Advance Safety Drill only.
Interview Comment	A comment field used during interview as a predefined comment, or you can input using free text. Available in Advance Safety Drill only.
Course & Certificates	Type of Courses and Certification required for each drill type.
Proficiency Level	Proficiency level offered in Courses and Certification.
Accredited Training Centers	Reputable Safety training centers recognized by the ship.

Configuring Safety Codes in Standard Drill

The majority of the setup windows are the same in Standard Safety Drill mode and below are the steps to configure the new codes for Gangway Locations, Safety Department, Safety Group, Safety Position, Safety Role, Safety Function, Safety Drill Type, Drill Location, Drill Instructorship, Course Type and Accredited Training Centers.

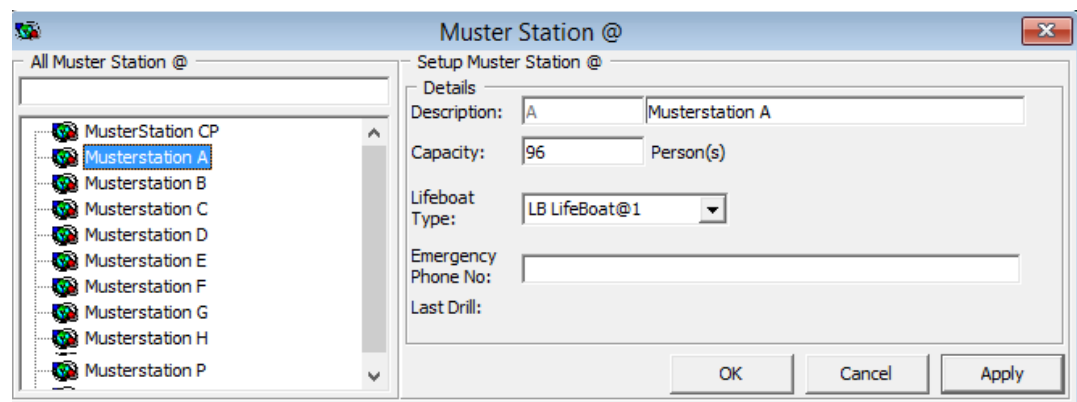
1. From the Safety Setup menu, select the **code** to configure.
2. Right-click the **blank space** on the left and select **Add New**.
3. Enter a short code and the name, and further describe the code in the **Comments** field.
4. The **Enabled** field is selected by default. Deselect the box to disable the code.
5. Click **Apply** to save the code.
6. Right-click the **code** and select **Remove** to delete the code from the system.

Setting Up Muster Station

A Muster Station is a required field in the Safety Drill setup and must be set up before you configure any Safety Drill. The layout of the configuration screen differs, depending on the setup mode in the **Parameter group, Safety, Advance Safety Drill**.

1. From the Safety Setup menu, select **Muster Station**.
2. Right-click on the **blank space** and select **Add Muster Station**.
3. Enter a **short code**, **field name**, and the **Capacity** allowed.
4. Select the **Lifeboat Type** from the drop-down list and insert an **Emergency Phone No**, if any.
5. Right-click the **code** and select **Copy Muster Station** to copy the information and add more codes.
6. In the Duplicate Muster Station window, enter the **Muster Station** and **description**.
7. Click **Apply** to save.

Figure 7-3 Muster Station Setup



Setting Up Lifeboat/Liferaft

A lifeboat/liferaft has a maximum capacity and does require a number of qualified crew to handle them in the event of an emergency.

Figure 7-4 Lifeboat/Liferaft Setup

The screenshot shows the 'Lifeboat / Liferaft Setup' window. The 'Setup' tab is active. A list on the left shows lifeboat codes from '01 - 01' to '14 - 14'. The 'Details' section on the right is for code '01'. Fields include: Description (01), Type (LB LifeBoat), Min Crew with CPSC Required (2), Max Capacity (313), Operators/Crew Assigned (14), Max Certified Capacity (empty), Muster Station Ralf Crane (0), Launch Sequence (0), and Remarks (Lifeboat Station 01). Buttons for OK, Cancel, and Apply are at the bottom right.

Table 7-2 Lifeboat/Liferaft Setup Field Definition

Field Name	Description
Description	Short code and description of the lifeboat/liferaft.
Type	The type of lifeboat/liferaft. These codes are predefined and hard coded.
Min. Crew with CPSC Required	Minimum number of CPSC certified crew on lifeboat/liferaft.
Max Capacity	Maximum capacity allowed per lifeboat/liferaft.
Operators/Crew Assigned	Number of crew assigned to this lifeboat/raft.
Max Certified Capacity	Maximum certified capacity of the lifeboat/raft.
Muster Station Raft Crane	Raft crane the lifeboat is assigned to in Muster Station.
Launch Sequence	Launch sequence of the lifeboat.
Remarks	Additional remarks of the lifeboat.

To set up the codes, repeat the steps in [Setting Up Muster Station](#). You can also duplicate an existing Lifeboat code using the same steps.

Setting Up Drill Definition

The Drill Definition code setup is where you define the type of drills and attendance requirement and identify drills that are Course and Certificate related.

Figure 7-5 Drill Definition Setup

The screenshot shows the 'Drill Definition Setup' window. At the top is a toolbar with buttons: Add New, Modify, Delete, Duplicate, Save, and Exit. Below the toolbar is a 'Drill Type Filter' dropdown set to 'Safety Drill - Life Boat'. The main area is divided into several sections:

- Drill Definition:** A table with columns: Status, Code, Description, Type, Once Every, Unit of Frequency, and Required x Days After Embarkation. It contains two rows: one for 'Inactive' (DR006, Drill - FIRE, SDR003 Safety Drill -) and one for 'Active' (DR007, Drill, SDR003 Safety Drill -) with '1' in the 'Once Every' column and 'Month' in the 'Unit of Frequency' column.
- Location:** A section with a table for Location and Comment.
- Instructor:** A section with a table for Name and Function.
- Required Operational Positions:** A section with a table for Position and Comment.
- Assigned Manning Number @:** A section with a table for Position and Comment.
- Schedule Summary:** A table with columns: Drill Date, Scheduled Count, Excuse Pending Count, Excused Count, and Attended Count.

1. From the Safety Setup menu, select the **Drill Definition**.
2. To add a new drill, click **Add New**.
3. Select the **Status** from the drop-down list. and enter the **Drill Code** and description.
4. In the Drill Definition section, select the **Drill Type** from the drop-down list.
5. Enter the **Unit of Frequency** and **Required x Days** after embarkation.
6. Click **Save** to save the record.
7. Select the **drill** and click **Modify**.
8. Enter the **Location, Instructor, Required Operational Positions** and **Assigned Manning Number**.
9. At the Location and Instructor section, right-click and select **Add New**.
10. Select the location from the drop-down list and enter the comment or function, if any.
11. At the Required Operational Positions section, right-click and select **Add New**.
12. Add a position individually or select **Add All** to select multiple positions or all.
13. In the Assigned Manning Number section, repeat step 7 and select **Assigned Manning number**.

Setting Up Course and Certificates

The Courses and Certificates code allow you to define the type Courses and Certifications required for each drill type, and identify the certificates expiry during an Emergency # (E Number) change.

Figure 7-6 Course and Certificates Setup Window

The screenshot shows the 'Course and Certificates Setup Window'. The 'Type' dropdown is set to 'All' and the 'Related to' dropdown is also set to 'All'. The table lists the following items:

Code	Description	Type
CPSC	Certificates Proficiency Survival Craft	Certificate
CRISIS	Crisis Management Certificate	Course
CROWD	Crowd Management Certificate	Course
ENV	Environmental Training	Course
F.AID	First Aid - Medical certificate	Medical Certi

The details section on the right contains the following information:

- Code: CPSC
- CMS Code: CPSC
- Name: Certificates Proficiency Survival Craft
- Related to: Safety
- Instructor:
- Training Centre:
- Renewal Days: All 0 Days
- Grace Period: 0 Days
- Expire Upon: No
- Debarkation: Active
- Status: No
- Priority: 0
- Minimum Required per Vessel: Certificates Proficiency Survival Craft
- Vessel:
- Comment:

Buttons at the bottom: Delete, Edit, New, Exit.

1. Select the **Course and Certificates** from the Safety Setup menu.
2. In the Course and Certificate window, click **New**.
3. In the Code and Name section, enter the **code** and the **name** of the course.
4. Select the **Type** and **Related to** from the drop-down list.
5. Enter the **course** description, instructor's **name** and the **training center** location.
6. Select the **type of expiration** section.
7. Enter the **Minimum Required Per Vessel**.
8. The Active check box is checked by default. Un-check if you wish to disable the course.
9. Check the **Priority** check box if the course is a priority.
10. Click **OK** to save the code.

Advance Safety Drill Mode

The Advance Safety Drill mode has more configuration codes in comparison to the Standard Safety Drill mode. Below are the additional codes.

- Deck Setup
- Fire Zone Setup
- Stair Well Setup
- Absence Reason
- Excuse Request Reason
- Excuse Unapprove Reason
- Interview Comment

These functions is enabled with **Safety, Advance Safety Drill** parameter set to one.

The majority of the screen layout and configuration of the codes are the same as Standard Safety Drill mode, with the exception of the below listed codes, which have additional fields or functions. The steps to create these codes are described in the following topic.

- Muster Station
- Lifeboat/Liferft
- Safety Function
- Drill Type
- Drill Definition
- Drill Template Setup
- Courses & Certificates

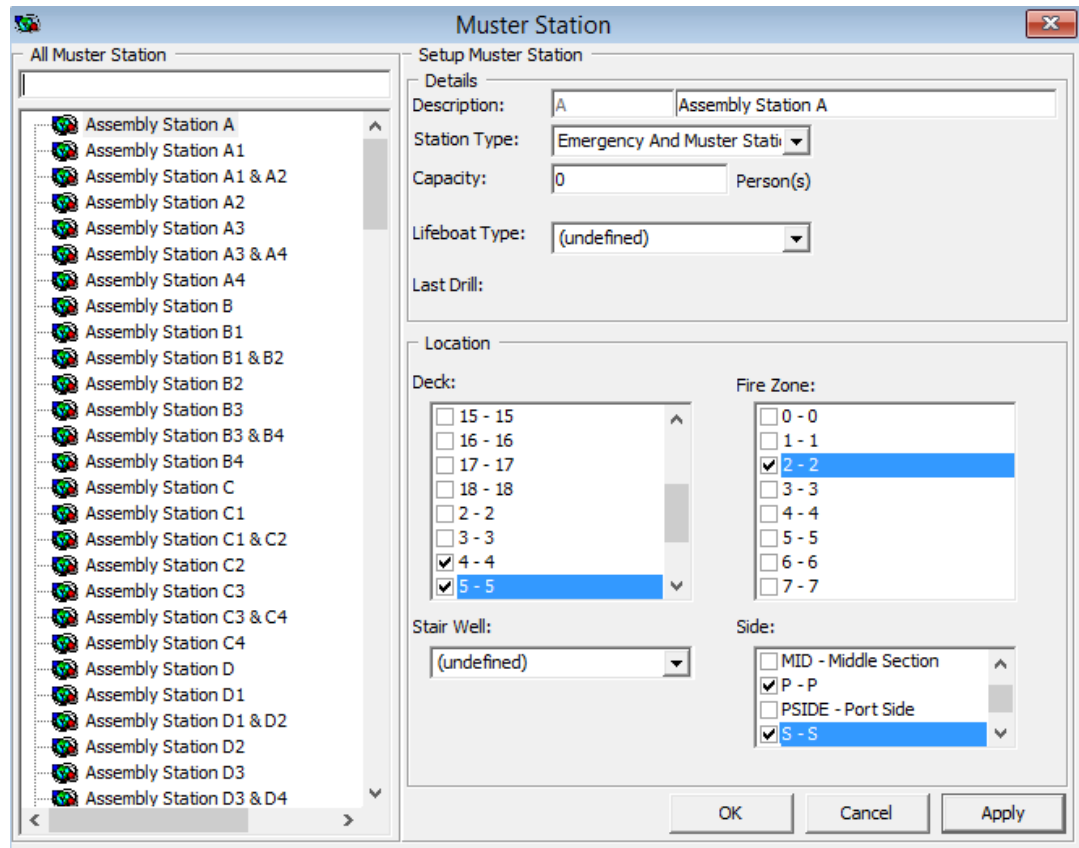
See chapter [Configuring Safety Codes in Standard Safety Drill](#) on how to set up new Safety Drill codes

Setting Up Muster Station In Advance Drill Mode

The Muster Station is a required field in the Safety Drill setup, which you must set up before you configure any Safety Drill. The layout of the configuration screen differs from the Standard Safety Drill mode.

1. From the Safety Setup menu, select **Muster Station**.
2. Right-click on the **blank space** and select **Add Muster Station**.
3. Enter a short code, field name and the **Capacity** allowed.
4. Select the **Lifeboat Type** from the drop-down list
5. In the Location section, check the correct **Deck, Fire Zone, Stair Well** and **Side** of the ship for each muster station.
6. Right-click the **code** and select **Copy Muster Station** to copy the information and add more codes.
7. In the Duplicate Muster Station window, enter the **Muster Station** and **description**.
8. Click **Apply** to save.

Figure 7-7 Muster Station Setup



Setting Up Lifeboat/Liferaft in Advance Drill Mode

You can define the drills types required based on the rules set forth, and this rule apply to the Training Drills set up that have the **Apply Training Rule** selected.

1. From the Safety Setup menu, select **Safety Drill Type**.
2. Right-click in the **blank space** and select **Add Drill Type**.
3. Enter the **short code** and **description**.
4. Check the **Apply Drill Rule** check box to enable the fields in Drill Rule.
5. Select the **drills** required from the drop-down list, enter the **number of days** after embark, the **number of Emergency Attendance (ES)** and **Muster Attendance (MS)** per calendar month.
6. Select the **Apply Training Rule** check box if the rule applies to Training Drills.
7. Click **Apply** to save.

Setting Up Safety Function in Advance Drill Mode

The role of Crew in Command of the Survival Craft is setup here and is required in the Muster List and Drill Template Setup. The layout of the configuration window differs from Standard Safety Drill mode.

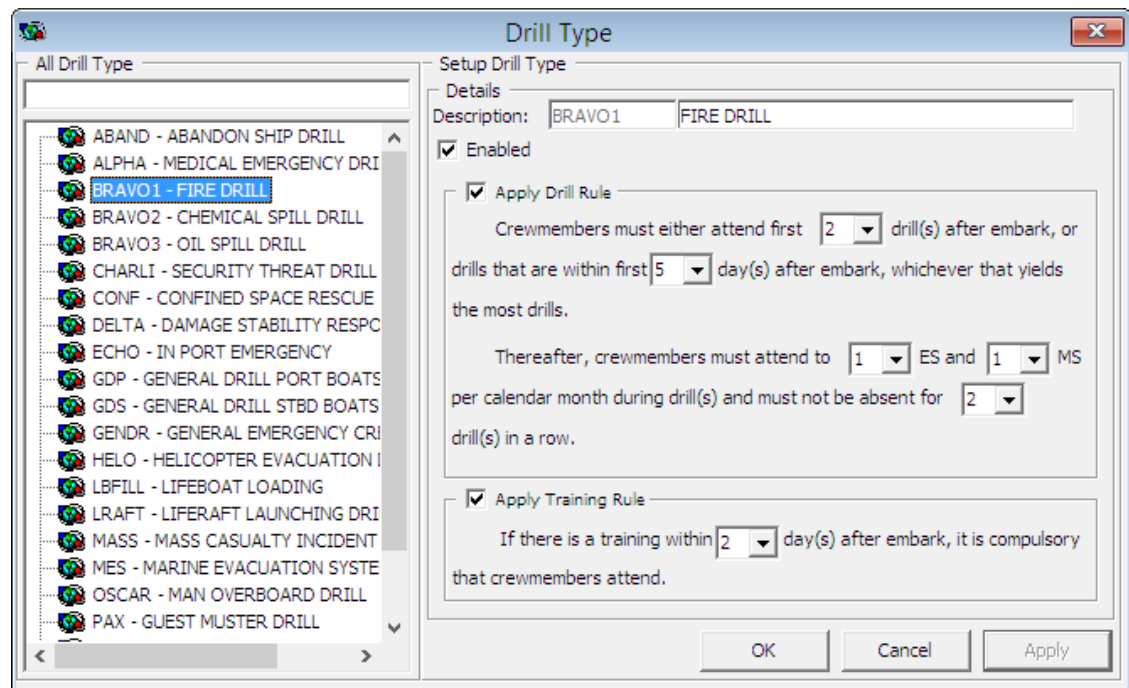
1. From the Safety Setup menu, select the **Safety Function**.

2. Right-click in the **blank space** and select **Add**.
3. Enter a **short code, description** and **comments**, if any.
4. Select the **Commander/2nd Commander** check box if needed.
5. Click **Apply** to save the code.

Setting Up Drill Type

The Safety drill type defines the type of drills required based on the rules set forth, and the rules is applicable to Training Drills if the **Apply Training Rule** is checked.

Figure 7-8 Drill Type Setup



1. From the Safety Setup, select the **Safety Drill Type**.
2. Right-click the All Drill Type section and select **Add Drill Type**.
3. Enter a code and description in the Description field.
4. Check the **Apply Drill Rule** to enable input of the rule.
5. Update all the fields in the Apply Drill Rule.
6. Check **Apply Training Rule** if the rule applies to Training.
7. Click **Apply** to save.

Setting Up Drill Definition in Advance Drill Mode

The Drill Definition code defines the type of drills, attendance requirements and identify whether drills are Course and Certificate related.

Figure 7-9 Drill Definition Window

The screenshot shows the 'Drill Definition Setup' window. It has a toolbar with buttons: Add New, Modify, Delete, Duplicate, Save, and Exit. Below the toolbar is a 'Drill Type Filter' dropdown set to 'Bravo - Bravo - Bravo Drill'. The main area is a table titled 'Drill Definition' with the following data:

Status	Code	Description	Type	Attendance Requirement	Course And Certificate
Active	003	Fire Drill	BRavo Bravo - Bravo - Bravo Drill		
Active	005	Confine Space Rescue Drill	BRavo Bravo - Bravo - Bravo Drill	Emergency Station	
Active	006	Damage Control Drill	BRavo Bravo - Bravo - Bravo Drill	Emergency Station	
Active	007	Oil Spill Drill	BRavo Bravo - Bravo - Bravo Drill	Emergency Station	
Active	008	Chemical Spill Drill	BRavo Bravo - Bravo - Bravo Drill	Emergency Station	
Active	014	Rescue from Confined Space Drill	BRavo Bravo - Bravo - Bravo Drill	Emergency Station	

1. From the Safety Setup menu, select the **Drill Definition**.
2. Click **Add New** to add a new drill.
3. At the definition grid, update the following.
 - a. Status
 - b. Drill Code and Description
 - c. Type
 - d. Attendance Requirement
 - e. Course and Certificate
4. Click **Save**.

Setting Up Drill Template in Advance Drill Mode

A drill template is setup to assist you in generating a crew list under Proposed Crew section using the criteria defined when creating a drill.

Figure 7-10 Drill Template Setup

1. Select **Drill Template** from the Safety Setup menu.
2. Right-click the blank space and select **Add Template**.
3. In the Details section, enter a short code and description, and then select the applicable code in all the fields.
4. Click **Apply** to save the template.
5. Click **OK** to exit.
6. Click **Reset** to clear the selected information from the screen.

Setting Up Course and Certificates in Advance Drill Mode

The Courses and Certificates code allow you to define the type of courses and certifications required for each drill type and identify the certificates expiry during on Emergency # (E Number) change.

Figure 7-11 Course and Certificate Setup Advance Drill Mode

The window is titled 'Setup Safety Courses & Certificates'. It has a 'Type' dropdown set to 'Courses' and a 'Related to' dropdown set to 'All'. Below this is a table with the following data:

Code	Description	Type	Related To
00A	CERTIFICATE A	Course	Safety
00B	Certificate B	Course	Safety
00C	Certificate C	Course	Safety
00D	Certificate D	Course	Safety
10COMM	COMMUNICATION COUNTS 2010	Course	Safety
10CULD	CULTURAL DIVERSITY 2010	Course	Safety
10FAID	FIRST AID	Course	Safety
10WPS	CREW WORK PLACE SAFETY 2010	Course	Safety
10ZTOL	ZERO TOLERANCE 2010	Course	Safety

On the right, the 'Details' section shows the following information for the selected item (00A):

- Code: 00A
- CMS Code: CERTIFICATE A
- Name: CERTIFICATE A
- Related to: Safety
- Instructor: Training Centre:
- Proficiency Level: All 365 Days
- Renewal Days: 0 Days
- Grace Period: No
- Expire Upon Debarkation: No
- Status: Active
- Priority: No
- Re-qualifying Course: No
- Minimum Required per Vessel: 0
- Expire On E Number Change: No
- Comment: HBST HOTEL BASIC SAFETY TRNG STCW
- Master Cert:

At the bottom right are buttons for 'Delete', 'Edit', 'New', and 'Exit'.

Figure 7-12 Edit Course/Certificate Window

The window is titled 'Edit Course/Certificate'. It contains the following sections:

- Code & Name:**
 - Code: []
 - CMS Code: []
 - Name: FIRST AID
 - Type: Course
 - Related to: Safety
 - Master Cert: (None)
- Description:**
 - Description: Basic First Aid Course
 - Instructor: []
 - Training Centre: (undefined)
- Expiration:**
 - ☒ Valid for specified number of days
 - Days Valid: 1826
 - Grace Period (Days): []
 - ☐ Valid until crew Debarck
 - Expire On E # Change: No
- Others:**
 - Minimum Required Per Vessel: 0
 - Proficiency Level: (undefined)
 - ☐ Re-qualifying Course

At the bottom left are checkboxes for 'Active' (checked) and 'Priority' (unchecked). At the bottom right are 'OK' and 'Cancel' buttons.

1. Select the **Course and Certificates** from the Safety Setup menu.
2. In the Course and Certificate window, click **New**.
3. In the Code and Name section, enter the **code** and the **name** of the course.
4. Select the **Type** and **Related to** and **Master Cert** from the drop-down list.
5. In the Description section, enter the **course description**, **instructor's name** and the **training center** location.
6. In the Expiration section, Select the type of expiration.

7. Enter the **Minimum Required Per Vessel, Proficiency** and check the **Re-qualifying Course**, if required.
8. The Active check box is selected by default. Deselect if you wish to disable the course.
9. Select the **Priority** check box if the course is a priority.
10. Click **OK** to save the code.

8

Stateroom Setup

The Stateroom Setup is a function used to define both the passenger and crew cabins. Before you begin coding the cabin, you must have the following:

- Cabin features codes
- Exact location of the cabin in Safety Plan
- Housekeeping sections

Figure 8-1 Cabin Setup Window

The screenshot shows the 'Cabin Setup' window. On the left, there is a list of cabins with columns for Cabin, Description, and Location. The list is filtered by 'All' and shows cabins 1012 through 1029. The right side of the window contains a form for editing a selected cabin. The form includes sections for Cabin Description, Resident Cabin, Connected with, Muster Station, Life Boat, Starboard/Portside, Location, Sort Priority, Vertical Zone, and With Special Need. At the bottom right, there is a 'Link Cabin' section. The bottom of the window has buttons for Copy, Delete, New, Edit, and Close.

Cabin	Description	Location
1012	Penthouse Grand Suite Cat.09	Penthouse Deck
1013	Penthouse Grand Suite Cat.09	Penthouse Deck
1014	Penthouse Grand Suite Cat.09	Penthouse Deck
1015	SPA Suite Cat.10	Penthouse Deck
1016	SPA Suite Cat.10	Penthouse Deck
1017	SPA Suite Cat.10	Penthouse Deck
1018	SPA Suite Cat.10	Penthouse Deck
1019	SPA Suite Cat.10	Penthouse Deck
1020	SPA Suite Cat.10	Penthouse Deck
1021	SPA Suite Cat.10	Penthouse Deck
1022	SPA Suite Cat.10	Penthouse Deck
1023	SPA Suite Cat.10	Penthouse Deck
1024	SPA Suite Cat.10	Penthouse Deck
1025	SPA Suite Cat.10	Penthouse Deck
1026	SPA Suite Cat.10	Penthouse Deck
1027	SPA Suite Cat.10	Penthouse Deck
1028	SPA Suite Cat.10	Penthouse Deck
1029	SPA Suite Cat.10	Penthouse Deck
1030		Penthouse Deck

Cabin Setup

Cabin Description

Cabin No.: 10000 Passenger
 No. of Berth: 1
 Berth Setup: 1
 Location: Penthouse Deck
 Category: Suite Cat.01
 Classification:
 Common Access Area:

Resident Cabin: No
Status: AV
Features: ,C 1S,

Connected with:
 Telephone Nos. [1] 10000 [2]
 HK Section: Engine Officer
 Remarks: Chief Engineer

Muster Station: Musterstation Y
Life Boat:
Starboard/Portside: Portside
Location: Not Define
Sort Priority: 10020

Vertical Zone:
With Special Need: No

Cabin Inventory: Actual Show Only
 Guest: 801 801
 Crew: 387 387
 Total: 1188 1188

Show Only

Decks: All Edit
 Category: All Edit
 Sections: All Edit
 Muster Station: All Edit
 Life Boat: All Edit
 Location: All Edit
 Classification: All Edit
 Vertical Zone: All Edit

☒ All ☐ Starboard ☐ Portside

Link Cabin

Copy Delete New Edit Close

Adding, Editing and Copying A Stateroom

1. From the Stateroom Setup menu, select **Staterooms** from the drop-down list.
2. In the Cabin Setup window, click **New**.
3. In the New Cabin form, enter the **Cabin number**, **No of Berth**, and **Berth Setup** and select the **Deck** from the drop-down list.
4. In the Feature section, select the **Type**, **Category**, **Features**, **Classification** and **Common Access Area**.
5. Select the **With Special Need Feature** if the cabin is equipped with special needs amenities.
6. Select the **HK Section**, **Life Boat**, **Muster Station**, **Location** and **Vertical Zone** in the Assignments section.

7. In the Crew Assignment section, select the **Keeper, Assistant Keeper, Head Waiter, Waiter** and **Assistant Waiter**.
8. Enter the Phone extension of the cabin in the **Phone Numbers** section.
9. If the cabin is linked to another cabin and has a common door, check the cabin number in the **Link Cabin** section.
10. Click **OK** to save the cabin number.
11. Repeat the same for the remaining cabin or use Copy Cabin to copy cabin of the same category and features.

Editing a Cabin

1. Select the **Cabin number** from the Cabin Setup window.
2. Click **Edit**.
3. Click **OK** to save the changes.

Copying a Cabin Code

The Copy Cabin function enables you to copy the cabin of the same type, and category and has the same features.

1. In the Cabin Setup window, select the **cabin number** to copy.
2. In the Cabin Setup form, enter the new cabin number and the telephone number.
3. Click **Add to List**.
4. Continue to add the cabin number until you complete the list.
5. Click **OK** to save.

Batch Check-In/Out

The Batch Check-In/Out function allows you to send triggers by batch to enable/disable the Telephone, ITV, or Dining System.

Figure 8-2 Batch Check In/Out Window

Batch Check-in/out

PBX Communication

Send Check-in Send Check-out

Interactive TV

Send Check-in Send Check-out

Dining

Send Check-in Send Check-out

Filter

☐ Include All Check In Guest/Crew

☐ Include Check In Guest Only

☐ Include Check In Crew Only

☒ Include Guest/Crew with below disembarkation date

☐ Include Guest Only with below disembarkation date

☐ Include Crew Only with below disembarkation date

31/01/2015

Close

Table 8-1 Batch Check-In/Out Filters

Field Name	Description
Include All Check In Guest/Crew	Sends triggers for all check-in/out for all guest.
Include Check In Guest Only	Sends triggers for check in/out guest only.
Include Check In Crew Only	Sends triggers for check in/out crew only.
Include Guest/Crew with below disembarkation date	Sends triggers for check/out guest/crew with specified disembarkation date.
Include Guest Only with below disembarkation date	Sends triggers for check/out guest with specified disembarkation date.
Include Crew Only with below disembarkation date	Sends triggers for check/out crew with specified disembarkation date.

1. From the Stateroom Setup menu, select **Batch Check-In/Out**.
2. Select from the available filter and select a **Date**.
3. Select the **type of batch** to execute.
4. Click **Close** to exit.

Feature/Amenity Item

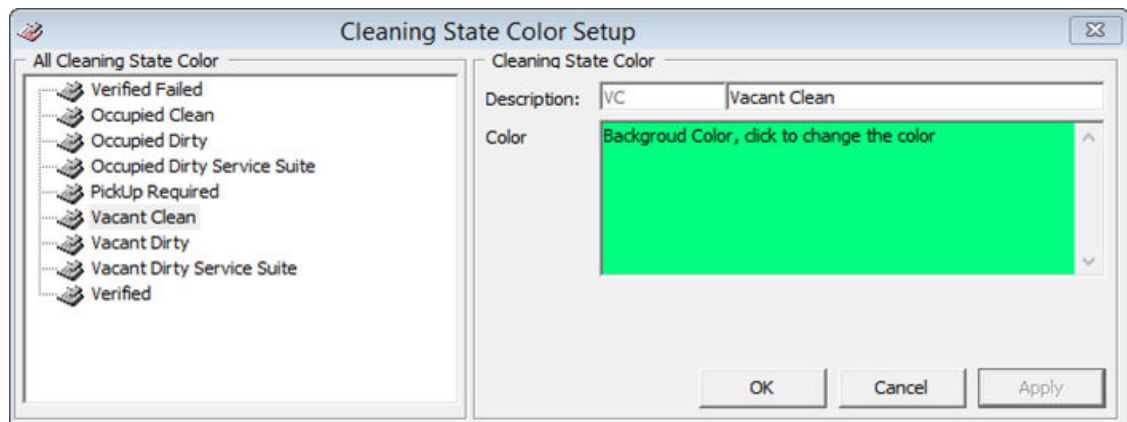
The Feature/Amenity Item is for you to set up the special request codes offered in Reservation.

1. Select **Feature** or **Amenity Items** from the Stateroom Setup menu.
2. Right-click on the blank space and select **Add New**.
3. Enter a code and description, and a comment if any.
4. Click **OK** to save.

Cabin Cleaning State Color

The Cleaning State Color allow you to define the cabin state according to its cleaning status if you choose not to use the system defaulted color. If you are defining your own cabin state color, you must update the color in the Deck Plan Setup.

Figure 8-3 Cleaning State Color Setup

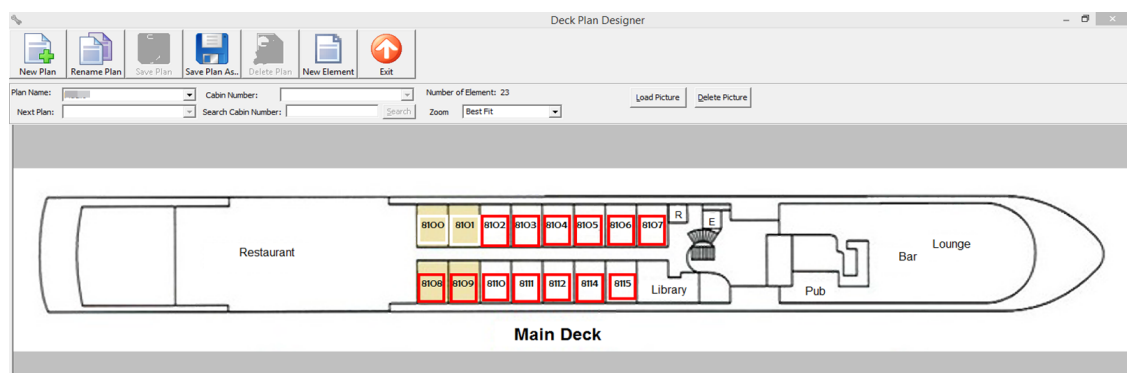


1. Select the **Cleaning State Color** from the Stateroom Setup menu.
2. Select the **Cleaning Status**.
3. In the **Color** field, click to change the background color.
4. Click **OK** to save.

Deck Plan Designer

Using the Deck Plan Designer, you can create a deck plan by linking the cabin number to the plan. This provides a layout view of the cabin in Management module.

Figure 8-4 Deck Plan Setup



1. Select the **Deck Plan Designer** from the Stateroom Setup menu.
2. Click **New Plan** and insert the **Plan name**.
3. Click **Load Picture** to load the base plan from file.
4. Click **New Element** and then drag the element box to the desired location.
5. Select the **Cabin Number** from drop-down list, then click the element box to assign the cabin.
6. Repeat steps 4 and 5 until all cabin numbers for the deck are assigned.
7. Click **Save Plan** to save the changes.

Editing a Deck Plan

1. From the Deck Plan Designer window, right-click the **element** you wish to edit.
2. Select the **option** from the menu.
3. Click **Save Plan** to save the changes.

Linking a Plan

The system allows you to link a deck plan to the next plan, enabling you to navigate from one plan to another with a single click. To link a plan, you must have multiple plans saved in Deck Plan Designer

1. Select a **Plan Name** to edit.
2. Select the **Next Plan** from the drop-down list.
3. Click **New Element** and place the element near a staircase of the diagram.
4. Click **Save Plan**.

Deck Plan Setup

Deck Plan Setup enable you to define the cabin color by the cabin cleaning status. It is recommended that you use the same color scheme as the [Cabin Cleaning State color](#).

1. Select **Stateroom Setup, Deck Plan Setup** from the Administration menu.
2. Click the **Font Color or Back Color** for the status and select the **color** from chart.
3. Select the **default plan** to appear in the Management module from the **Default Deck Plan**.

Note:

Checking the **Show Deck Plan by default** changes the cabin selection window from Classic View to Deck Plan View in the Management module.

Ving Card Crew Key Type

This feature is designed to enable you to create the crew key card by berth instead of cabin number and is based on the crew's embarkation/disembarkation.

1. In the Stateroom Setup, select **Ving Card Crew Key Type**.
2. Right-click on the **left panel** and select **Add New**.

3. Enter the **Code**, **Description** and **Comment**.
4. Click **OK** to save.

Common Access Area

This feature enables you to create the common area accessible by guest or crew, which you can encode into their keycard.

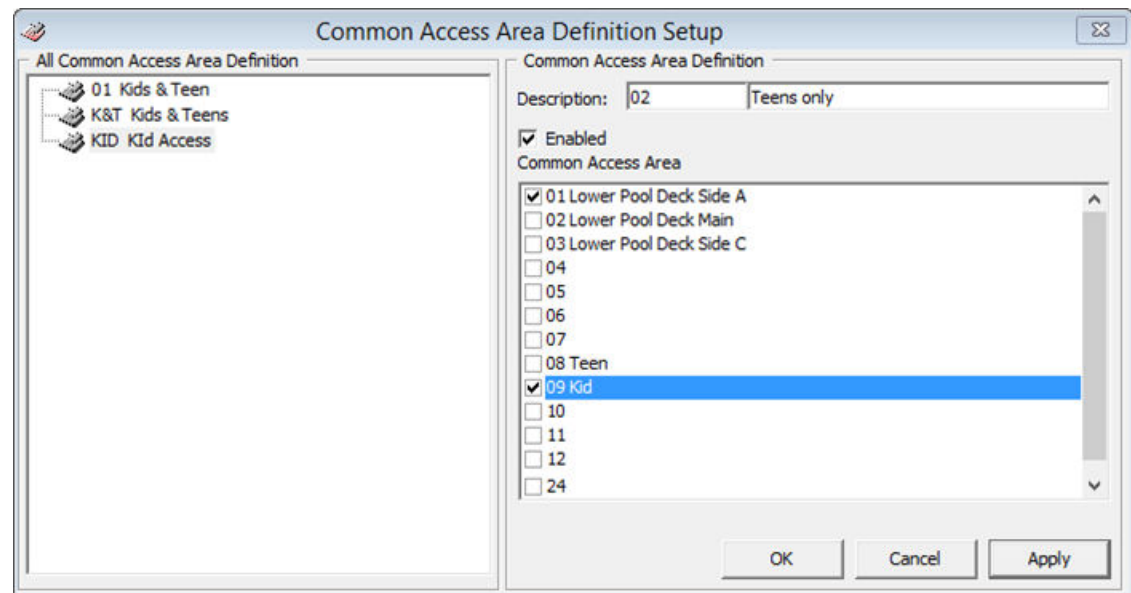
Common Access Area Name

1. Select **Common Access Area Name** from the drop-down list.
2. Right-click on the **left panel** and select **Add New**.
3. Enter a **Code**, **Description** and **Comment**.
4. Click **OK** to save.

Common Access Area Definition

This feature groups the common areas accessible by guests. The areas are linked in Cabin Setup or Guest Handling.

Figure 8-5 Common Access Area Definition



1. Select **Common Access Area Name Definition** from the drop-down list.
2. Right-click on the **left panel** and select **Add New**.
3. Enter a **Code**, **Description** and **Comment**.
4. Check the respective common area for this code and click **Apply**.
5. Repeat the above until you have created all of the areas.
6. Click **OK** to save.

9

System Codes

The Systems Codes is an area where you would configure majority of the guest related codes. These codes is use to manage the guest preferences, requests and statistic tracking. These system codes are entered from **Administration, System Codes** and the setup is similar for most of the codes, with the exception for those marked with an asterisk (*).

Table 9-1 System Codes Field Definition

Function Name	Description
Action Codes	A follow up code for services.
Amenity Codes	Amenities provided to guest.
VIP Codes	Use in defining the type of VIP categories.
Session Codes	Defines the session use in Cashbook module.
Handicap Codes	Defines the type of disability/accessibility required by guest.
Nationality Groups *	Defines group of nationality for use in Shore Denied list.
Accounts Categories	Defines the category of accounts group
Document Types *	Defines the acceptable type of legal documents.
Guest Categories	Defines the classification of guest types.
Dining Times	Defines the available dining time slots.
General Reason Codes *	Defines the reason codes use in various modules, for example, cabin change reason, voiding a transaction, and so on.
Marital Status Codes	Defines the guest/crew marital status.
Payroll Pension Plan Type	Defines the available pension plan offered to crew.
Nationality Codes *	Defines the nationality codes in ISO codes.
Travel Insurance	Defines the Travel Insurance plan available.
Comment Types	Defines the type of comments received. For example, Service, pricing, food quality and others.
Comment Report Types	Defines the method comments were received.
Comment Departments Involved *	Defines the department involves in handling the comments.
Resolution Types	Defines the resolution codes use in Comment
Comment Category	Defines the comment by category/group.
Chips Workstation	Defines the Chips & Pin workstation name.
Enable/Disable Log Entry	Defines the functions to enable/disable in the log entry, besides the default value.
eOne Enable Contingency Mode Reason Code	Defines the reason use when enabling contingency mode.

Table 9-1 (Cont.) System Codes Field Definition

Function Name	Description
eOne Disable Contingency Mode Reason Code	Defines the reason use when disabling contingency mode.
Nationality Flag	Defines the additional Nationality Flag for Crew.

Setting Up System Codes

1. From the System Codes menu, select the **code** to set up.
2. In the Codes Setup window, right-click the **blank space** and select **Add New**.
3. Enter a **Code**, **Description** and **Comment**, if any.
4. Click **OK** to save.

Nationality Codes

Setting Up Nationality Groups

Figure 9-1 Nationality Groups Setup

Nationality Groups Setup

Nationality Groups

Please specify nationalities you want to assign to nationality group you are defining. Nationalities listed must be separated with a comma and each within dash (-) sign (e.g. -US-, -UK-, -AU-).

Description: US

Nationality Codes: -US-, -VI-, -UM-

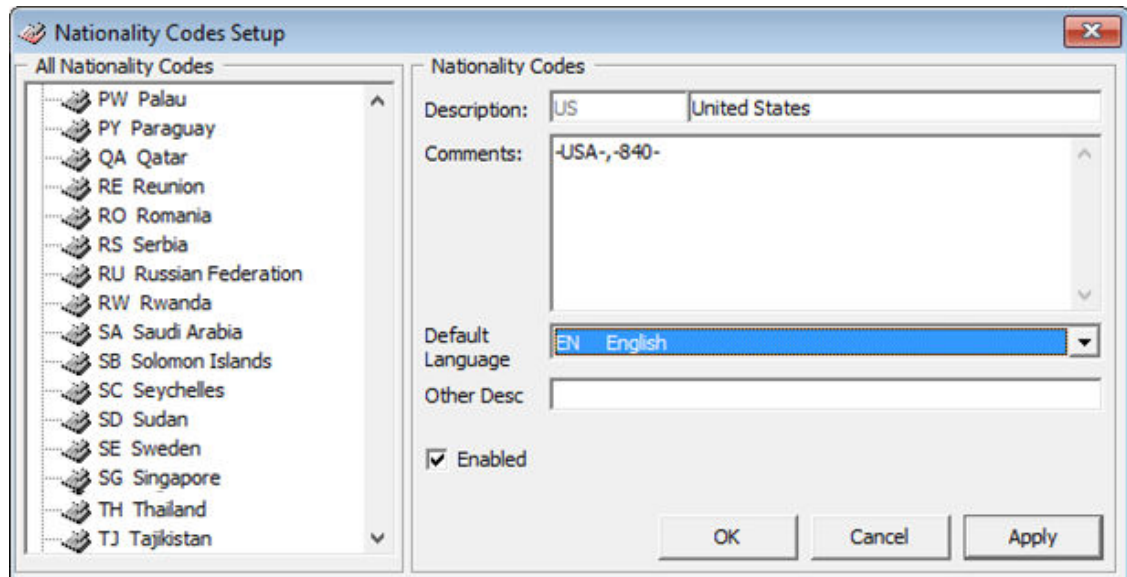
Comments: -US-, -VI-, -UM-

OK Cancel Apply

1. From the System Codes menu, select the **Nationality Groups**.
2. In the Nationality Setup window, right-click the **blank space** at the left panel and select **Add Nationality Group**.
3. Enter the **description**, the **Nationality Codes** with a hyphen (-) before and after the code , and a **comma** (,) to separate the codes.
4. Enter a **Comment**, if any.
5. Click **Apply** to save.

Setting Up Nationality Codes

Figure 9-2 Nationality Codes Setup

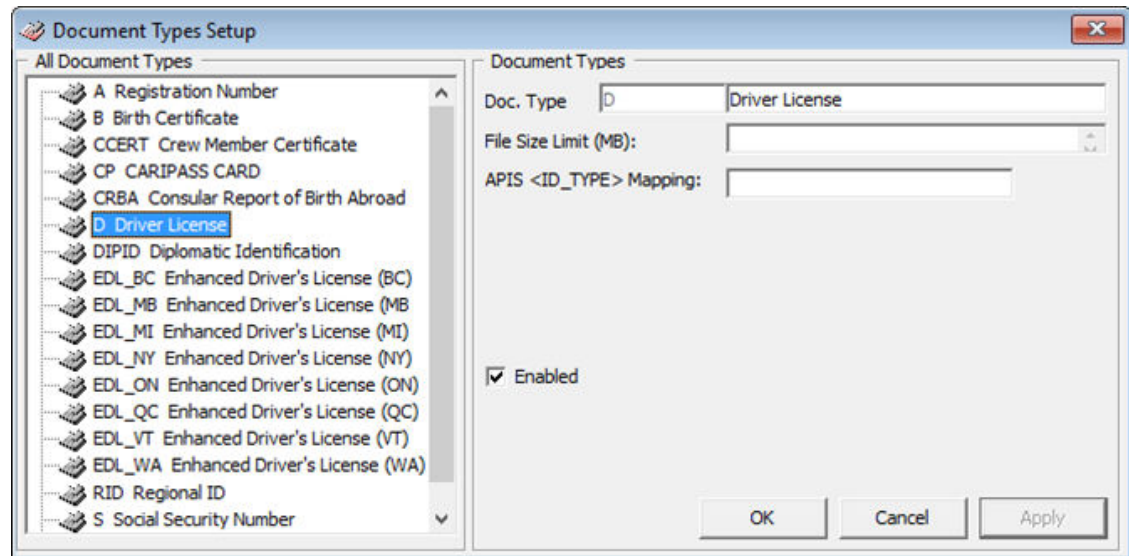


A set of standard ISO nationality code is pre-installed in the system. The steps to configure the Nationality Codes is the same as the above. You can define the language use for each nationality code by changing the default language.

Setting Up Document Types

A wide range of travel document types is accepted by the ship. in order to provide an electronic pre-arrival and departure manifest data on all passengers and crew to border security. These document types must be mapped in the Advanced Passenger Information System (APIS) code.

Figure 9-3 Document Types Setup



1. Select the **Document Types Setup** from the System Codes menu.
2. Right-click the blank space on the left panel and select **Add New**.
3. Enter the **Doc. Type**, **Description** and maximum file size allow in the **File Size Limit (MB)**.
4. In the **APIS<ID_TYPE> Mapping**, enter the corresponding **APIS Doc Type**.
5. Click **Apply** to save.

Setting Up General Reason Code

The General Reason Codes is used when voiding a charge, changing a cabin, or make any changes that require a reason. These codes can be module specific or shared.

1. Select the **General Reason Codes** from the System Codes menu.
2. Right-click the **blank space** on the left panel and select **Add New**.
3. Enter the **Code**, **Description**, and the **Comment**.
4. Select the **Module** from the drop-down list if it is module specific.
5. Click **Apply** to save.

Setting Up Comment Departments

The Common Departments feature enable you to create and group various departments involved in handling a request or comment received.

Figure 9-4 Comment Departments Involved

1. Select the **Comment Departments Involved** from the System Codes menu.
2. Right-click the **blank space** on the left panel and select **Add New**.
3. Enter the **Code**, **Description**, and the **Comment**.
4. Click **Apply** to save.

Enabling/Disabling Log Entry

The Log Entry Setup lists the default log entry available in SPMS for use in reporting. These codes are enabled by default. You can disable this feature by selecting the feature from the list, deselecting the **Enable** check box, and clicking **OK** to save.

10

Package Plans

The Package Plan manages components purchased at a fixed package value. Package components are typically comprised of cabin charge, food and beverage, and/or tours or spa. These posting are generally routed from the Point of Sale (POS) system to SPMS through an interface.

Setting up a Package Plan Template

Setting up the Package Plan elements will determine the package value the guest is entitled to, and the correct amount to reduce from the package plan per consumption.

Defining the Required Parameters

The parameter set forth determines the posting behavior for the package, and this is set up in **Administration, Database Parameter Setup, Package** group.

PAR_GROUP Package

Table 10-1 Parameter Group Package

PAR Name	PAR Value	Description
Default Payment Department		Defines the default Package Payment Code.
Default Posting Department		Defines the default Posting Department for package plan.
Default Refund Department		Defines the default Refund Department code.
Default second posting department		Defines the posting department code used for 2nd posting in package plan.
Do not allow post package to both buyer and payer	0,1	Defines where the posting will be posted as set in Parameter, Package, Package Plan Routing . 0 = Posting will be posted to both party – buyer and payer. 1 = Will post to 1 party – either buyer or payer.
Enable Package Auto Balance	0,1	Enable Package Auto Balance balances the Package Posting by line item. 0 = Disable 1 = Enable
Max Item Per Check	0,>0	Defines the maximum number of items allowed per check. 0 = Unlimited, >0 = Max X item per check

Table 10-1 (Cont.) Parameter Group Package

PAR Name	PAR Value	Description
Package Plan Before Routing	0,1	Defines whether to apply posting as package before or after routing. 0 = Apply package after routing 1 = Apply before routing
Prepaid Package System Account		System default is Null. Setting value to 0 will disable un-posted prepaid package. <i>This applies to reservation import only.</i>
Process Package Plan when move posting	0,1	Defines the type of posting shown when posting is moved. 0 = Posting remain as originally posted regardless whether package is assigned, e.g. package posting as package even without package assigned and regular posting as regular even if package is assigned. 1 = Package posting will become regular posting if the guest does not have a package assigned. Regular posting will become package posting if the guest has a package assigned.
Prompt Signature during purchase package	0,1	Define whether signature is required during purchase. 0-No signature required 1-Signature required only for package price > 0, If the package apply is > 1 person, only 1 signature is required.
Service Charge Offset Department		Defines the Department Code used to offset transaction with pos_pp_id>0 and pos_exclude_sevchg=0. This is a Debit posting.
Service Charge Offset System Account		Defines the System Account assigned for offsetting package transactions.
Synchronize changes in Templates to Package Plan		This setting auto populate changes made in a template into a package plan template. This only applies when “all cruise is checked”.
Prepaid Package System Account		Repository account for Unposted Package Plan.

Defining a Package Template

A template is set up by defining the required fields, and is used as a base for new package plan.

1. Select **Administration** from the menu.
2. From the drop-down menu, select **Package Plan**, and **Template Setup**.
3. Click **New**.

Figure 10-1 Package Plan Template Setup

4. Enter the relevant fields such as **Template name**, **Payment Department**, and/or **Credit Limit**.

Package Plan Template

Figure 10-2 Package Plan Template

[illegible]

Field Definitions

Below table describes the available fields in Package Plan Template.

Table 10-2 Field Definitions for Package Plan Template

Field Name	Field Definitions
Template Name	User definable template name.
External Template Name	User definable external template name.
Payment Department	Default Payment Department. Enter this if you have <i>not</i> set them in Parameter , Package , Default Payment Department .
Credit Limit Controls	
Cruise Limit	Check only if package has unlimited value.
Department Limit	The limit is based on Parameter, Use individual department limit (enter -1 for unlimited).

Table 10-2 (Cont.) Field Definitions for Package Plan Template

Field Name	Field Definitions
Daily Limit	Determines the daily limit allowed for a package. Checked if value is unlimited. Function is enable when Parameter, Do not use Daily Limit is unchecked.
Price	Package purchased price.
Flex Package Quantity	Defines the quantity allowed for a flexi package. Quantity specified include count indicated in SPMS Department and Micros Item Package. The item in the same group will be counted as 1 quantity if the group is not = 0.
*Daily Price	This is a dynamic pricing where the sales price decreases dynamically when the cruise day is reduced. Dynamic Sales will have Price=0 (ppn_price=0) and Daily Price > 0 (ppn_daily_saleprice > 0)
Overall Quantity Limit, 0 = individual item qty limit	Defines the limit of item quantity allowed per package. If limit = 0, the limit is based on quantity set within the individual item.
System Account	Defines the system account used for prepaid package posting. If no account is defined, it uses the default set in Parameter, Package, Prepaid Package System Account .
Disable selling x day after cruise start (0 - No limit)	Defines the available sale days of the package after cruise starts. - If the value = 0, unlimited selling period for the package. - If the value set is > 0, then the sale days is equal to PC System Date - SYS_DATE. When the calculated value >=X day, then the package is not available for sale by days specified.
Minimum Age Requires to buy (0 - No Limit)	Defines the minimum required age for purchase of a package plan. If value is >0 and the guest age is less than the value set, the package will not display in the drop-down list.
Department code	Defines the Default Posting Department code for the package. You may set a % of postings to be posted to this department, and the % is definable in Parameter, Package, Default Posting Department .
2nd Department Code	If the 1st Dept is not set to 100%, the remaining postings will be posted to the 2nd Dept. This requires a 2nd Dept Code Parameter, Package, Default second posting department .
Refund Dept	Defines the Default Refund Department code use to offset a package during refund. This reference to Parameter, Package, Default refund package .

Table 10-2 (Cont.) Field Definitions for Package Plan Template

Field Name	Field Definitions
Credit Overflow accepted	Option to split remaining credit on last package transaction. When the posting amount is > than package, it will post as a normal posting.
Do not use daily limit	Determines the posting limit to use, either a Daily Limit or Cruise Limit.
Only eligible for buyer only	If a passenger has purchased a package and at the same time has other passengers routed to his/her account, the package will only apply to transactions posted to the person that purchased the package.
*Print on Invoice	Option to print the package postings on invoice. User is required to include the filter in the Invoice Report to show/hide the package posting based on this parameter.
Allow unused balance carry over to next cruise	Option to enables the unused balance of a package to be carried over to the next cruise.
Use Individual Department Limit (Enter -1 for unlimited)	Defines the limit allowed for each individual department. Enter the limit in Department Limit field besides Cruise Limit (see item no. 5) if checked.
Must purchase for all eligible guest in same cabin	Option to automatically posts the purchased packages to all guest in same cabin that are eligible for package plan.
Exclude from Hotel Bar Service Charge	Option to exclude the Hotel Bar Service Charge from the Service Charge calculation. The service charge postings will have <code>pos_exclude_sevchg=1</code> .
The passenger need to select the eligible department individually	This enables the flex package handling, an option that allows a number of eligible items for posting, and is primarily use in Flexi Package.
Must purchase for all eligible guest routed to the same payer	When enabled, system will post the same package to all guest routed to the same payer.
Assign Package to Payer	Option to assign the package to the payer. This box is applicable to price packages only.
MICROS Item Quantity Options	
Max Quantity per day (0-unlimited)	Defines the maximum POS quantity allowed per day. 0 = Unlimited
Max Item Per Check (0-unlimited)	Defines the maximum POS Item allowed per check. If the parameter Max Item per check defined, system will post the lowest value to the package.
Include Service Charge in the package	Option to post the Service Charge associated to the transaction to the package.
Include Tax in the Package	Option to include the Tax charge associated to the transaction to the package.
Custom Limit	

Table 10-2 (Cont.) Field Definitions for Package Plan Template

Field Name	Field Definitions
Custom Field	Option to specify custom credit limits for the same package; for example specify an all inclusive package and then specify a custom cruise limit via Reservation Import in a pre-specified database field. This function only work on packages with cruise limit and daily limit, and is not applicable to packages by department limit and QTY package.
Others	
This package is for all cruises	Option is only available in Package Plan setup. Checking the box enables the package for all cruises.
SPMS Department/Micros 9700/Symphony Item Quantity	
SPMS Department/Micros 9700/Symphony Item Quantity	Defines the department and quantity to be included in the package.

Adding SPMS Departments Code to a Package Template

Adding the eligible department codes to the package plan template defines which transaction to be posted as a package plan or as regular posting. This can only be done after creating the Package Template shell.

1. In the **Package Plan, Template Setup**, select the template name from the list.
2. Click **Edit**.
3. In the **SPMS Department** tab, click **Add Department**.
4. Select the department code, and click **OK** to save.

 Note:

You may select the department codes either by the group defined or individually.

5. To add more department codes, repeat the steps above.

Adding MICROS 9700/Symphony Item Quantity Code to a Package Template

Adding the eligible MICROS 9700/Symphony Item Quantity Code to a package plan template determines where each transaction from MICROS/Symphony POS will be accepted as a package plan component when posting to the guest account.

1. In the **Package Plan, Template Setup**, select the template name from the list.
2. Click **Edit**.
3. In the **Micros 9700/Symphony Item Quantity** tab, select the **Revenue Center**, and then click **Add Item**.
4. Choose the menu item to display using the radio button. At the top of the Add Micros Item window, use the **Search bar** or **Filter by Family Group**.
5. Select the menu item to add, and use the **CTRL+** key for more item selection.
6. Enter the quantity in **Cruise Quantity** field, and click **OK** to save.

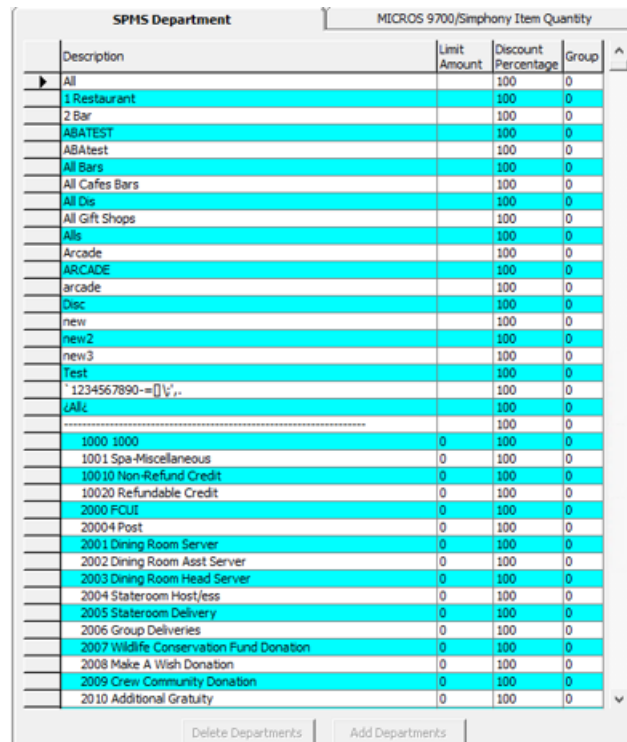
- To add more menu items, repeat steps 3 to 6.

Defining SPMS Departments Code Limit

A limit can be set for each eligible department, either by amount, percentage, or group.

- In the **Package Plan, Template Setup**, select the template name from the list.
- Click **Edit**.
- Select the department code listed in **SPMS Department** tab.

Figure 10-3 Adding SPMS Departments



Description	Limit Amount	Discount Percentage	Group
All	100	0	
1 Restaurant	100	0	
2 Bar	100	0	
ABATEST	100	0	
ABAtest	100	0	
All Bars	100	0	
All Cafes Bars	100	0	
All Dis	100	0	
All Gift Shops	100	0	
Alls	100	0	
Arcade	100	0	
ARCADE	100	0	
arcade	100	0	
Disc	100	0	
new	100	0	
new2	100	0	
new3	100	0	
Test	100	0	
* 1234567890-=[\] \',,	100	0	
uAll	100	0	
-----	100	0	
1000 1000	0	100	0
1001 Spa-Miscellaneous	0	100	0
10010 Non-Refund Credit	0	100	0
10020 Refundable Credit	0	100	0
2000 FCU	0	100	0
20004 Post	0	100	0
2001 Dining Room Server	0	100	0
2002 Dining Room Asst Server	0	100	0
2003 Dining Room Head Server	0	100	0
2004 Stateroom Host/ess	0	100	0
2005 Stateroom Delivery	0	100	0
2006 Group Deliveries	0	100	0
2007 Wildlife Conservation Fund Donation	0	100	0
2008 Make A Wish Donation	0	100	0
2009 Crew Community Donation	0	100	0
2010 Additional Gratuity	0	100	0

- Enter the limit by double clicking on either the **Limit Amount**, **Discount Percentage**, or **Group**.
 - Limit Amount:** This is limit amount and is enabled by the **Use Individual Department Limit** parameter.
 - Discount Percentage:** This sets the limit by percentage.
 - Group:** Field used to group items in flexi package.
- Click **OK** to save.

Defining MICROS 9700/Symphony Item Quantity Limit

A limit can be set for each eligible MICROS/Symphony Item, either by Menu Item, Major Group, Family Group, or Sale Itemizer.

- In the **Package Plan, Template Setup**, select the template name from the list.
- Click **Edit**.
- Select the department code listed in **MICROS 9700/Symphony Item Quantity** tab.

Figure 10-4 Adding Menu Items

4. Enter the limit by double-clicking on either the Daily Qty, Limit Qty, Max Value Allow, or Group.
 - **Daily Qty (Quantity):** Quantity allowed per day on item selected.
 - **Limit Qty:** Quantity allowed per cruise.
 - **Max Value Allow:** The maximum item price allowed within the package.
 - **Group:** Field used to group items in flexi package.
5. Click **OK**.

Configuring Package Plan

Setting Up a Basic Non-Selling Price Package

A Basic Non-Selling Price Package is an allowance accorded by the Ship to the guest in a package form, usually comprises of a selection of department codes, has a cruise limit and these packages are not sellable. Below is an example for a package that comprises of all food department with a package spending value of \$300.

1. Select **Administration** from the menu.
2. From the drop-down menu, select **Package Plan**, and then select **Template Setup**.
3. Click **New**.
4. Name the template and define the cruise limit, e.g.: \$300.
5. Select **All Foods** under SPMS Department to add all the sub-department classified under the food category.

Figure 10-5 Package Plan Template - Item Setup

Package Plan Template Items Setup

☒ Enabled

Template Name: FOOD COMP

External Template Name: FOOD COMP

Payment Department: 10100 Cash

Credit Limits

Cruise Limit: ☐ Unlimited 300 Department Limit: ☐ Unlimited

Daily Limit: ☐ Unlimited Price:

Flex Package Quantity: Daily Price:

Overall quantity limit:

0=Individual item qty limit:

System Account:

Disable selling x day after cruise start (0-No Limit):

Minimum Age Requires to buy (0-No Limit): 0 0

Dept Code: 3503 Cruise Package % 100.00

2nd Dept Code: % 0.00

Refund Dept: Expire After x days:

☒ Credit Overflow Accepted ☒ Do not use Daily Limit

☐ Only eligible for buyer only ☐ *Print on invoice

☐ Allow unused balance carry over to next cruise ☒ Allow purchase via Web Service

☐ Use Individual Department Limit (Enter -1 for unlimited)

☐ Must purchase for all eligible guest in the same cabin

☐ Exclude from Hotel Bar Service Charge ☐ Assign Package to Payer

☐ The passenger needs to select the eligible department individually

☐ Must purchase for all eligible guest routed to the same payer

Micros Item Quantity Options

Max quantity per day (0 - Unlimited): 0

Max item per check (0 - Unlimited): 0

☒ Include Service Charge in the package ☒ Include Tax in the package

Custom Limit

Custom Field: Percentage

SPMS Department

MICROS 9700/Symphony Item Quantity

Description	Limit Amount	Discount Percentage	Group
All		100	0

Delete Departments Add Departments

OK Cancel

6. Click **OK**, exit from the Template Setup, and navigate to the **Package Plan Setup**.
7. In the Package Plan Setup, click **New** to add the package for cruise, making them available for sale or to be assigned.
8. Select the template created earlier from the drop-down list, and click **OK**.

Figure 10-6 Example of Basic Non-Selling Price Package

New Package Planner for Cruise

Select Existing Template: **FOOD COMP**

☒ Enabled

Package Plan Name: **FOOD COMP**

External Package Name: **FOOD COMP**

Payment Department: **10100 Cash**

☒ This package is for all cruises

Credit Limits

Cruise Limit ☐ Unlimited Department Limit

Daily Limit ☐ Unlimited Price

Overall quantity limit, 0=Individual item qty limit

System Account **Use PAR->Package->Prepaid Package System Account**

Disable selling x day after cruise start (0-No Limit)

Minimum/Maximum Age Requires to buy (0-No Limit)

Dept Code **3503 Cruise Package** %

2nd Dept Code %

Refund Dept Expire After x days

☒ Credit Overflow Accepted ☒ Do not use Daily Limit

☐ Only eligible for buyer only ☐ *Print on invoice

☐ Allow unused balance carry over to next cruise ☒ Allow purchase via Web Service

☐ Use Individual Department Limit (Enter -1 for unlimited)

☐ Must purchase for all eligible guest in the same cabin

☐ Exclude from Hotel Bar Service Charge ☐ Assign Package to Payer

☐ Must purchase for all eligible guest routed to the same payer

Micros Item Quantity Options

Max quantity per day (0 - Unlimited)

Max item per check (0 - Unlimited)

☒ Include Service Charge in the package ☒ Include Tax in the package

Custom Limit

Custom Field Percentage

None

SFMS Department

MICROS 9700/Simphony Item Quantity

Description	Limit Amount	Discount Percentage	Group
All	100	0	
1 Restaurant	100	0	
2 Bar	100	0	
ABATEST	100	0	
ABATEST	100	0	
All Bars	100	0	
All Cafes Bars	100	0	
All Dis	100	0	
All Gift Shops	100	0	
Alls	100	0	
Arcade	100	0	
ARCADOC	100	0	
arcade	100	0	
Disc	100	0	
new	100	0	
new2	100	0	
new3	100	0	
Test	100	0	
1234567890-1111	100	0	
LAB	100	0	
1000 1000	100	0	
1001 Spa-Miscellaneous	100	0	
10010 Non-Refund Credit	100	0	
10020 Refundable Credit	100	0	
2000 FCJE	100	0	
20004 Post	100	0	
2001 Dining Room Server	100	0	
2002 Dining Room Asst Server	100	0	
2003 Dining Room Head Server	100	0	
2004 Stateroom Host/ess	100	0	
2005 Stateroom Delivery	100	0	
2006 Group Deliveries	100	0	
2007 Wildlife Conservation Fund Donation	100	0	
2008 Make A Wish Donation	100	0	
2009 Crew Community Donation	100	0	
2010 Additional Gratuity	100	0	

Delete Departments Add Departments

OK Cancel

Setting Up a Basic Selling Price Package

A Basic Selling Price Package is a price based package that comprises on a group of departments, for example, All Food department. This type of package is sellable and has a spending limit. Below is how to set up a sellable package using the template created earlier. For example, package comprises of all Food department with a spending value of \$500 and selling price at \$300.

1. Repeat steps 1 to 7 of the above setup.
2. From the drop-down menu, select **Package Plan**, and then select **Package Plan Setup**.
3. Click **New** and select a template from the drop-down list.
4. Enter the **Package Plan Name** and **External Package Name**.
5. Change the **Cruise Limit**, e.g.: \$500 and enter the selling **Price**, e.g.: \$300
6. Enter the number of days in '**Disable selling X day after cruise start**', if you wish to disable the selling of package x days after the cruise starts, e.g.: Cruise starts on 10 and X day is 5, package will be disabled from selection on the 16th.
7. Click **OK**.

Figure 10-7 Example of Basic Selling Price Package

New Package Planner for Cruise

Select Existing Template : **FOOD COMP**

☒ Enabled

Package Plan Name: **FOOD COMP**

External Package Name: **FOOD COMP**

Payment Department: **10100 Cash**

☒ This package is for all cruises

Credit Limits

Cruise Limit ☐ Unlimited **500** Department Limit **0.00**

Daily Limit ☐ Unlimited **300** Price **300**

Daily Price **0.00**

Overall quantity limit, 0=Individual item qty limit **0**

System Account: **Use PAR->Package->Prepaid Package System Account**

Disable selling x day after cruise start (0-No Limit) **0**

Minimum/Maximum Age Requires to buy (0-No Limit) **0**

Dept Code: **3503 Cruise Package** % **100.00**

2nd Dept Code: % **0.00**

Refund Dept: **0** Expire After x days **0**

☒ Credit Overflow Accepted ☒ Do not use Daily Limit

☐ Only eligible for buyer only ☐ *Print on invoice

☐ Allow unused balance carry over to next cruise ☐ Allow purchase via Web Service

☐ Use Individual Department Limit (Enter -1 for unlimited)

☐ Must purchase for all eligible guest in the same cabin

☐ Exclude from Hotel Bar Service Charge ☐ Assign Package to Payer

☐ Must purchase for all eligible guest routed to the same payer

Micros Item Quantity Options

Max quantity per day (0 - Unlimited) **0**

Max item per check (0 - Unlimited) **0**

☒ Include Service Charge in the package ☒ Include Tax in the package

Custom Limit

Custom Field: **None** Percentage: **0.00**

SPMS Department

Description	Limit Amount	Discount Percentage	Group
All	100	0	0
1 Restaurant	100	0	0
2 Bar	100	0	0
BARTEST	100	0	0
BARTEST	100	0	0
All Bars	100	0	0
All Cafes Bars	100	0	0
All Deli	100	0	0
All Gift Shops	100	0	0
All	100	0	0
Arcade	100	0	0
ARCADE	100	0	0
arcade	100	0	0
Disc	100	0	0
new	100	0	0
new2	100	0	0
new3	100	0	0
new4	100	0	0
new5	100	0	0
new6	100	0	0
new7	100	0	0
new8	100	0	0
new9	100	0	0
new10	100	0	0
new11	100	0	0
new12	100	0	0
new13	100	0	0
new14	100	0	0
new15	100	0	0
new16	100	0	0
new17	100	0	0
new18	100	0	0
new19	100	0	0
new20	100	0	0
new21	100	0	0
new22	100	0	0
new23	100	0	0
new24	100	0	0
new25	100	0	0
new26	100	0	0
new27	100	0	0
new28	100	0	0
new29	100	0	0
new30	100	0	0
new31	100	0	0
new32	100	0	0
new33	100	0	0
new34	100	0	0
new35	100	0	0
new36	100	0	0
new37	100	0	0
new38	100	0	0
new39	100	0	0
new40	100	0	0
new41	100	0	0
new42	100	0	0
new43	100	0	0
new44	100	0	0
new45	100	0	0
new46	100	0	0
new47	100	0	0
new48	100	0	0
new49	100	0	0
new50	100	0	0
new51	100	0	0
new52	100	0	0
new53	100	0	0
new54	100	0	0
new55	100	0	0
new56	100	0	0
new57	100	0	0
new58	100	0	0
new59	100	0	0
new60	100	0	0
new61	100	0	0
new62	100	0	0
new63	100	0	0
new64	100	0	0
new65	100	0	0
new66	100	0	0
new67	100	0	0
new68	100	0	0
new69	100	0	0
new70	100	0	0
new71	100	0	0
new72	100	0	0
new73	100	0	0
new74	100	0	0
new75	100	0	0
new76	100	0	0
new77	100	0	0
new78	100	0	0
new79	100	0	0
new80	100	0	0
new81	100	0	0
new82	100	0	0
new83	100	0	0
new84	100	0	0
new85	100	0	0
new86	100	0	0
new87	100	0	0
new88	100	0	0
new89	100	0	0
new90	100	0	0
new91	100	0	0
new92	100	0	0
new93	100	0	0
new94	100	0	0
new95	100	0	0
new96	100	0	0
new97	100	0	0
new98	100	0	0
new99	100	0	0
new100	100	0	0

Buttons: **Delete Departments** **Add Departments** **OK** **Cancel**

Setting Up a Flexi Non-Selling Price Package

The Flexi Non-Selling Price Package function is similar as the Basic Non-Selling package. The only exception is, it provides user the flexibility in choosing the department to be included in the package during package assignment. For example, package is inclusive of All Beverage department with the cruise limit of \$300.

1. Select **Administration** from the menu.
2. From the drop-down menu, select **Package Plan**, and then select **Template Setup**.
3. Click **New**.
4. Name the template and define the cruise limit, e.g.: \$300.
5. Select the department group under **SPMS Department** to add all the sub-department classified under this category, for example, All ALC Beverage.
6. In the Package Plan Template Items Setup, Credit Limit section, check **“The passenger needs to select the eligible department individually”** option, to enable department code selection during package assignment.
7. Click **OK**, exit from the Template Setup, and then navigate to the **Package Plan Setup**.
8. In the Package Plan Setup, click **New** to add the package for cruise, making them available for sale or to be assigned.
9. Select the template created earlier from the drop-down list, and click **OK**.

Setting Up a Flexi Selling Price Package

The Flexi Selling Price Package function is similar as the Basic Selling package. The only exception is, it provides user the flexibility in choosing the department to be included in the

package during package assignment and has a selling price. For example, package include All Beverage department with a cruise limit of \$300 and selling price at \$200.

1. Repeat steps 1 to 7 of the above setup.
2. From the drop-down menu, select **Package Plan**, and then select **Package Plan Setup**.
3. Click **New** and select a template from the drop-down list.
4. Enter the **Package Plan** and **External Package Name**.
5. Change the **Cruise Limit**, e.g.: \$300 and enter the selling **Price**, e.g.: \$200.
6. Click **OK**.

Figure 10-8 Example of Flexi Selling Price Package

Package Plan Setup Per Cruise

☒ Enabled

Package Plan Name: BEV ALC PROMO

External Package Name: BEV ALC PROMO

Payment Department: 10100 Cash

☒ This package is for all cruises

Credit Limits

Cruise Limit: ☐ Unlimited Department Limit: 0.00

Daily Limit: ☐ Unlimited Price: 200

Daily Price: 0.00

Overall quantity limit, (0=Individual Item qty limit): 0

System Account: Use PAR ->Package->Prepaid Package System Account

Disable selling x day after cruise start (0-No Limit): 0

Minimum/Maximum Age Requires to buy (0-No Limit): 0

Dept Code: 3503 Cruise Package % 100.00

2nd Dept Code: % 0.00

Refund Dept: Expire After x days:

☒ Credit Overflow Accepted ☒ Do not use Daily Limit

☐ Only eligible for buyer only ☐ *Print on invoice

☐ Allow unused balance carry over to next cruise ☐ Allow purchase via Web Service

☒ Use Individual Department Limit (Enter -1 for unlimited)

☐ Must purchase for all eligible guest in the same cabin

☐ Exclude from Hotel Bar Service Charge ☐ Assign Package to Payer

☐ Must purchase for all eligible guest routed to the same payer

Micros Item Quantity Options

Max quantity per day (0 - Unlimited): 0

Max item per check (0 - Unlimited): 0

☒ Include Service Charge in the package ☒ Include Tax in the package

Custom Limit: Custom Field: Percentage: 0.00

None

SPHS Department

Description	Limit Amount	Discount Percentage	Group
1000 1000	0	100	0
1001 Spa Miscellaneous	0	100	0
10010 Non-Refund Credit	0	100	0
10020 Refundable Credit	0	100	0
2000 PCUE	0	100	0
2004 Host	0	100	0
2001 Dining Room Server	0	100	0
2002 Dining Room Asst Server	0	100	0
2003 Dining Room Head Server	0	100	0
2004 Stateroom Host/less	0	100	0
2005 Stateroom Delivery	0	100	0
2006 Group Deliveries	0	100	0
2007 Wildlife Conservation Fund Donation	0	100	0
2008 Make A Wish Donation	0	100	0
2009 Crew Community Donation	0	100	0
2010 Additional Gratuity	0	100	0
2011 Ad Hoc Gratuities	0	100	0
2014 Concoerge Gratuities	0	100	0
2015 Concoerge Gratuities- Cash Collected	0	100	0
2016 Pre-Paid Reversal (Manual)	0	100	0
2019 Pre-Paid Offset	0	100	0
3013 Floral Arrangement	0	100	0
3040 Stateroom Celebrations - Birthday	0	100	0
3044 Bon Voyage w/ Korbel Stout	0	100	0
3046 Bon Voyage w/ Asst Spumante	0	100	0
3049 Fruit and Cheese Platter	0	100	0
3055 Hot So Hidden Mickey Floral	0	100	0
3096 No Host Lite	0	100	0
31001 Officant	0	100	0
31002 Fargo	0	100	0
31003 Florida Marriage License	0	100	0
31004 Floral	0	100	0
31005 Cake Topper	0	100	0
31006 Muesli	0	100	0
31007 Worldwide Cab	0	100	0

Delete Departments Add Departments

OK Cancel

Setting Up a Quantity Non-Selling Price Package

The Quantity Non-Selling Price Package function is similar as the Basic Non-Selling package, and this package works in tandem with POS Systems. This type of packages has a limit set on item quantity allowed per day, per check, or per cruise from the POS System. Below is an example for a package that comprises of items from Food Major Group with a maximum quantity per day as 0 and Maximum Item per check at all revenue center is 3, cruise quantity is 10, and with maximum value of the item at \$100.

1. Select **Administration** from the menu.
2. From the drop-down menu, select **Package Plan**, and then select **Template Setup**.
3. Click **New**.
4. Name the template and define the cruise limit, e.g.: \$300.
5. Under the Micros 9700/Symphony Item Quantity tab, select all revenue center this package is eligible to, and then click **Add Item**.

Note:

The total number is based on Micros/Simphony Department setting.

6. In the **Add Micros Item** window, select **Major Group**, and then highlight all the items under the group.
7. Enter the **Cruise Quantity**, and then click **OK**.
8. In the Package Plan template Items Setup, **Micros Item Quantity** section, select option **"Include Service Charge in the package"** and **"Include Tax in the package"**.
9. Click **OK**, exit from the Template Setup, and then navigate to Package Plan Setup.
10. In the Package Plan Setup, click **New** to add the package for cruise, making them available for sale or to be assigned.
11. Select the template created earlier by quantity from the drop-down list, and click **OK**.

Figure 10-9 Example of Quantity Non-Selling Price Package

Setting Up a Mixed Selling Price Package

The Mixed Selling Price Package is a combined package elements quantity and base package. The package comprises of Micros/Simphony Quantity and SPMS Department. Below is an example for a package that comprises of all non-alcoholic Beverage department with the cruise limit of \$500, selling price at \$400, Sales Itemizer of 1, Cruise quantity of 5, and a maximum value of \$100.

1. Select **Administration** from the menu.
2. From the drop-down menu, select **Package Plan**, and then select **Template Setup**.
3. Click **New**.

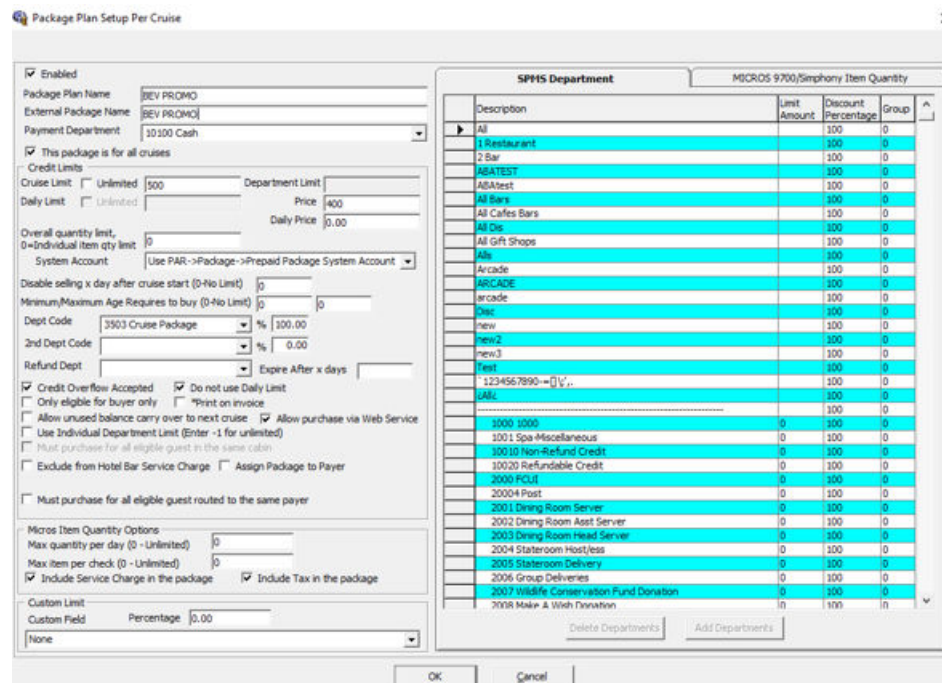
2. From the drop-down menu, select **Package Plan**, and then select **Template Setup**.
3. Click **New**.
4. Name the template and define the cruise limit, and selling price, e.g.:\$500 and \$400 respectively.
5. Under the **Credit Limit** section, check “**The passenger needs to select the eligible department individually**”, to enable the flexibility in selecting the department codes entitled by the package.
6. In the SPMS Department tab, select the department group, and then navigate to Micros 9700/Symphony Item Quantity tab, and select all revenue center this package is eligible to, and then click **Add Item**.
7. In the **Add Micros Item** window, click the **Major Group** radio button, and set the group number accordingly.

 Note:

The total number is based on Micros/Symphony Department setting.

8. Enter the **Cruise Quantity** of the selected item and the **Maximum value allowed**, e.g.: Quantity 5 and value as 4.
9. Click **OK**. Exit from the Template Setup, and then navigate to **Package Plan Setup**.
10. In the **Package Plan Setup**, click **New** to add the package for cruise, making them available for sale or to be assigned.
11. Select the template created earlier by quantity from the drop-down list, and then click **OK**.

Figure 10-11 Example of Mixed Flexi Price Package



12. User is then required to select the items when assigning/purchasing the package in the guest account.

13. If group 1 is selected, all the items set in group 1 are automatically highlighted, as shown below.

Figure 10-12 Flexi Package Plan Selection Screen

Purchase Package Plan

Package Plan
Assignment: FLEXI PROMO

Reason : Max Package Allow is 4

The following guest will be assign/charge the package

First Name	Last Name	Cabin
TEST	AUTO UPDATE 7	103

Fidelio Department **Micros 9700 Item Quantity**

Selected	Description	Limit Amount	Discount Percentage	Group
☒	2002	0	0	0
☒	20022 Beverage Non Alc	0	100	1
☒	2004	0	0	0
☒	20042 Beverage Non Alc	0	100	2

Selected Package Qty: 10 ☐ Move all existing posting to package posting
 Selected Package Value: 0.00 ☐ Post to Prepaid System Account
 Selected Package Price: 400.00

OK Cancel

Package Plan Assignment

The Package Plan function enables the end-users in customizing a cruise package that suits its guest requirements. The Package Plan function not only provide them the flexibility in combining different food and beverage outlets, excursions or activities, it also helps boost the sales in some areas.

Assigning/Purchasing a Package Plan

Assigning the right package to the guest account will enable transactions to be posted accurately throughout the cruise, and this is performed in the **Management, Guest Handling** module.

1. Log in to **Management** module, and select **Cashier**.
2. Select **Guests** from the drop-down menu to open the Guest Handling screen.
3. In the Guest Handling screen, search and select the guest record using guest name or cabin number.
4. On the selected guest record, click **Disc,Route,Pkg** tab, and then **Package Plan** tab.
5. Select one of these options:

- **Assign Package Plan:** To assign an available package that does not have a pre-set purchase price.
- **Purchase Package Plan:** To purchase a package setup with the purchase price.

Figure 10-13 Package Plan Options

6. To assign/purchase, select the available Package from the drop-down list, and enter the Reason.

Figure 10-14 Package Plan Assignment Screen

Note:

Only check 'Move all existing posting to package posting' when you wish to move the existing posting to package plan. For example: A guest purchased the package part way through the cruise, and past posting that meets the package elements are to be considered as package plan.

7. Click **OK**.
8. Information's pertaining to the package is displayed in the **Package Plan** tab and status is **Active**.

Figure 10-15 Package Plan Assigned/Purchased

The screenshot shows the Oracle CRM interface for Package Plan Assignment. The top navigation bar includes tabs: Credit Cards, Comments, Other Info, Travel Documents, Custom Info, Guest History, Loyalty/Track It, Guest Info, **Disc,Route,Pkg**, Invoice: 0.00, More Guest Info, Service Info, Activity Viewer, Revenue Analyzer, and History. The **Disc,Route,Pkg** tab is active, showing sub-tabs: Routing, Fideko Discount, Micros Discount, Micros Advance Discount, **Package Plan**, and Disallow Dept. The **Package Plan** sub-tab is selected, displaying a table with columns: Package, Total Value, Redeemed Value, Available Value, Enable, Description, Daily Qty, Available Amt/Qty, Disc % / Max Value, and Group. A package is selected, and the 'Selected Package Qty' is 0. At the bottom, there are buttons: Select All, Unselect All, Assign Package Plan, Purchase Package Plan, Delete Package Plan, Edit Flexible Package Plan, Disable Package, and Refund Package Plan.

Refunding a Package Plan

The unused package plan can be refunded to the guest at the end of the cruise. Below are the steps to refund a Value based package, Quantity based, and Mix package.

1. Log in to **Management** module, and select **Cashier**.
2. Select **Guests** from the drop-down menu to open the Guest Handling screen.
3. In the Guest Handling screen, search and select the guest record using guest name or cabin number.
4. On the selected guest record, click **Disc,Route,Pkg** tab, and then **Package Plan** tab.
5. Select **Refund Package Plan**.

Figure 10-16 Package Plan Refund Option

The screenshot shows the Oracle CRM interface for Package Plan Refund. The top navigation bar is the same as in Figure 10-15. The **Package Plan** sub-tab is selected. A dialog box titled 'FC Management' is displayed in the center, with the following text: 'Please note you are not able to undo this operation. Total refund amount = [value] Are you sure you want to refund the package QTY PKG 1?'. The dialog has 'Yes' and 'No' buttons. In the background, the 'Refund Package Plan' button at the bottom right is highlighted with a green border.

⚠ WARNING:

Once a refund is processed, it is **not** possible to reverse the changes. This process also **disables** the package plan.

- Once the package plan is refunded, system will *disable* the package and displays the remaining value/quantity for references only. In the event where the posting is more than the package price, system will prompt that the refund is not allowed.

Routing a Package Plan Posting

Routing of a package plan posting are dependable on two parameters; **Do not allow post package to both buyer and payer** parameter and **Package Plan Before Routing** parameter.

In the event where both payer and buyer have a package, all postings will go to the payer. Once the payer package is fully utilized, subsequent postings are posted into the payer account as normal posting.

Auto Balancing a Package Plan

An Auto Package Plan balancing may be set using **Enable Package Auto Balance as 1** parameter, and System will auto balance the package invoice/account after each transaction, and reducing the total package value or quantity at the same time.

Figure 10-17 Package Plan Invoice Screen

If the above parameter is set to 0, manual balancing of the package invoice/account is required using the **Pay Invoice** function.

To Manually Balance a Package Invoice

- Log in to **Management** module, and select **Cashier** on the menu bar.
- Select **Guests** from the drop-down menu to open the Guest Handling screen.
- In the Guest Handling screen, search and select the guest record using the **guest name** or **cabin number**.
- Navigate to the **Invoice** tab, and then click the amount button under the Package Invoice.

Figure 10-18 Settling a Package Plan

5. Choose the **Payment method** and verify the amount to settle when prompted, and click **Pay** or **Pay&Print** to pay and print the invoice at the same time.

Figure 10-19 Paying an Invoice

**Note:**

This process reduces the Package Invoice balance accordingly.

POS Interface

An interface setup is required for the Point of Sales Systems such as MICROS 9700 or Symphony to communicate with the Management module, enabling a charge to be posted to the guest account. The setup may differ on both systems, and are described in the following chapter.

Setting Up MICROS 9700/Simphony Interface

To configure any settings for Micros 9700/Simphony interface, you are required to establish a connection to the **MICROS DB** using the Net Manager program, and then followed by setting up the required parameters in the **Administration, System Setup, Parameter**.

As majority of the settings are managed within the system parameters, they are defined below:

PAR_PROMO

Table 10-3 Parameter Group Promo for Micros Server

PAR Name	PAR Value	Description
Micros Server Name		Micros Database Service Name.
Micros Server Type		Database Platform MICROS 9700 is installed on: 0 - Oracle 1 - Microsoft SQL Server
Micros User Name		Micros Database User Name.
Micros User Password		Micros Database User Password.

To set up the MICROS 9700/Simphony Interface

1. Log in to **Administration** and select **Administration** on the menu bar.
2. Select **System Setup** from the drop-down list, and then select **Database Parameter Setup**.
3. Select **Promo** group from the tree-view.
4. Enter the **Micros Server Name**, **Micros Server Type**, **Micros User Name** and **Micros User Password**.

Note:

A faster package enquiry can be obtained by specifying the **IP address** and **Service Name** in parameter, **Promo**, **Micros Server name**.

Setting Up Web Service Connection for Advance Micros Interface

Setting up a Web Service Connection enables user in enquiring the guest information including package purchased, and the look up for sellable package in Advance Micros Interface. The Advance Micros Interface configuration is slightly different to Micros 9700 interface, and below figure shows where information's are entered.

1. Launch **OHC Advanced Micros** program and go to the **Settings** tab.
2. Under **Pack Viewer Web Server**, enter the **Web Server Address**, **User Name** and **Password**.
3. Click **Apply**.

Figure 10-20 Advance Micros Interface

Other Setup

In order for POS User to view the guest information such as guest profile, a package purchased and remaining package plan, bill look up and many more, a **Micros Picture View** application must be configured at **MICROS POS**. Please consult MICROS Specialist for configuration of such application.

Setting Up Symphony Interface

As majority of the settings are managed within the system parameters, they are defined in PAR_PROMO parameter, as below:

PAR_PROMO

Table 10-4 Parameter Group Promo for Micros Server

PAR Name	PAR Value	Description
Micros Server Name		Micros Database Service Name.
Micros Server Type		Database Platform Symphony is installed on: 0 - Oracle 1 - Microsoft SQL Server

Table 10-4 (Cont.) Parameter Group Promo for Micros Server

PAR Name	PAR Value	Description
Micros User Name		Micros Database User Name.
Micros User Password		Micros Database User Password.

To Set Up the Symphony Interface

1. Log in to **Administration**, and select **Administration**.
2. Select **System Setup** from the drop-down list, and then select **Database Parameter Setup**.
3. Select **Promo** group from the tree-view.
4. Enter the **Micros Server Name**, **Micros Server Type**, **Micros User Name**, and **Micros User Password**.

 Note:

A faster package enquiry can be obtained by specifying the **IP address** and **Service Name** in parameter, **Promo**, **Micros Server name**.

5. Under Parameter group **Simphony**, enter the property ID in **Micros Simphony Property Number to copy the DB**.

 Note:

The property ID is obtainable from Symphony Properties Enterprise System.

Setting Up Web Service Connection for Simphony

Setting up a Web Service Connection enables user in enquiring the guest information including package purchased, and the look up for sellable package in Simphony system.

To Set Up a Web Service Connection

1. Log in to **Simphony-EMC** and go to **Properties Enterprise** tab.
2. On the left of the window, choose the properties you wish to connect to.
3. Double-click on the selected properties, and then go to **Data Extension** tab.
4. Enter the value of these extension field:
 - Fidelio Web Server Address
 - Web Server Login User Name
 - Web Server Login User Password

Figure 10-21 Symphony Data Extension Table

General **Data Extensions**

Current Record

Number [Audit This Record](#)

Name

Data Extensions

Column	Value
Crew Macro = Disable	
DCL CC Gangway Par in SPMS	
Disable Auto Svc Discrepancy Check	☒
Disable Discount Discrepancy Check	☒
Disable Minor Control	☒
Do not post tax to SPMS	☒
Do not show department/item when no balance	☒
Do not show gift card balance	☒
Do not show main department name	☒
Do not show package name when no balance	☒
Enable Buffer Posting When Offline	☒
Enable Debugging Log	☒
Enable Signature Confirm Message	☒
Enable Uncollate Printing	☒
ESC Command for the Fiscal Printer to move the black s	
Fidello Web Server Address	
Guest Macros = Disable	
Hide Cabin Number from Posting Response	☒
Include Posting Disable Account During Inquiry Result	☒
Include System Disable Account During Inquiry Result	☒
Include Title In Salutation	☒
Loyalty Discount Require Swipe Card	☒
Online Credit Card Format	
Print Additional Space on the left for additional receipt	
Print Offline Tender Media Vooucher	☒
Prompt Change Acc Info	☒
Prompt Bartender Number	☒
Prompt Confirmation before Store Inquiry Info	☒
Prompt for Backup Tender when timeout	☒
Replace Salutation with Title	☒
Resident Macros = Disable	
Save Guest Type on Check Store Info	☒
Service Exempt Discount # (Apply to VAT only)	
Show Card Swiped/Manual Entry on check	☒
Store Cabin Number/Guest Name	☒
Store Inquiry Info on Check	☒
True = VAT, False=Add On	☒
Use Validation Printer during adjust close check	☒
Web Server Login User Name	
Web Server Login User Password	

Data Import via DGS ResOnline

With the Shore Side office taking reservations and selling the packages, data from the 3rd party system can be imported into Oracle Hospitality Cruise Shipboard Property Management System (SPMS).

Setting Up Data Import Parameter

Prior to importing any data from 3rd party systems, following parameters **must be** enabled, allowing unposted package plan to be captured in one single location. The parameter in reference is **Package, Prepaid Package System Account** and is accessible in **Administration, System Setup, Parameter**.

Handling Prepaid Package Plan

When importing data from 3rd party system via Data Import or DGS ResOnline, System will insert a 'Y' in PPP_PREPAID column, indicating that the package is a prepaid package. Data without PPP_PREPAID=Y will be posted to the Pre-Cruise invoice of the guest.

Figure 10-22 Sample Data Import Fields

Advanced Package Plan Setup							
ID	Description	Length	Data Type	Date Format	Reservation Ref	Advanced Package Plan Ref	Handle Type Ref
1	GUESTID	10	OTHERS		RES_V_GUESTID		0
2	PACKAGEID	20	OTHERS			PPP_PPW_ID	0
3	PREPAIDACCOUNT	10	OTHERS			PPP_ACC_ID	0
4	TOTAL	10	OTHERS			PPP_TOTAL	0
5	DEBIT	10	OTHERS			PPP_DEBIT	0
6	CREDIT	10	OTHERS			PPP_CREDIT	0
7	ENABLE	10	OTHERS			PPP_ENABLE	0
8	REFERENCE	20	OTHERS			PPP_VID	0

To View All the Unposted Package Postings

1. Log in to **Management** and select **Cashier**.
2. Select **Unposted Package Posting** to display the unposted package posting.
3. Select the item and click **Post** to post the package amount to the system account. The package will then be shown in the Guest Account.



WARNING:

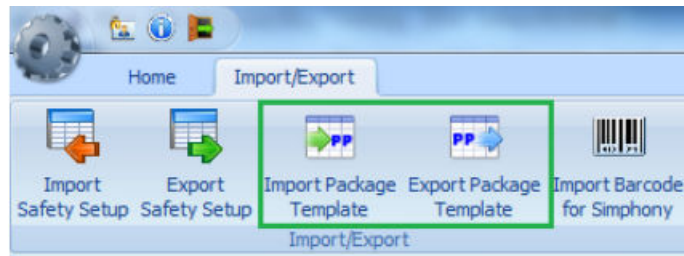
System will not check for unposted package posting when checking out the guest account.

Figure 10-23 Unposted Package Postings Screen

Importing Data Import Package Template

A package template can be imported from ship to ship so that a standard set of information is ported into the SPMS. In order to use this function, user must be granted with access rights **4494 - Import Package Template** and **4495 - Export Package Template**.

Figure 10-24 OHC Tools - Import/Export Package Template



To Import a Template,

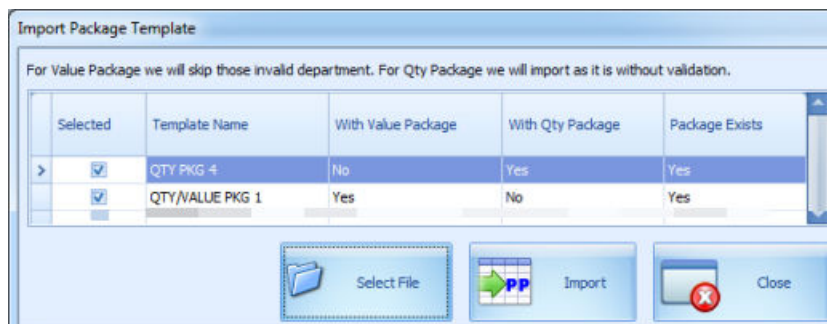
1. Log in to **OHC Tools** and select **Import/Export** tab.
2. Click the **Import Package Template** on the ribbon bar.
3. When prompted, select the **Package Template XML** that you would like to import.
4. By default, all the packages in the XML file are selected. To de-select, uncheck the line item in **Selected** column.
5. Click **Import** to import the package template.
6. Records are inserted accordingly into the following table- PPT, PPI, PPTI, and PPTR.



Note:

System removes the PPTI and PPTR records and re-insert a new record if any update were done in the PPT table.

Figure 10-25 Import Package Template Screen

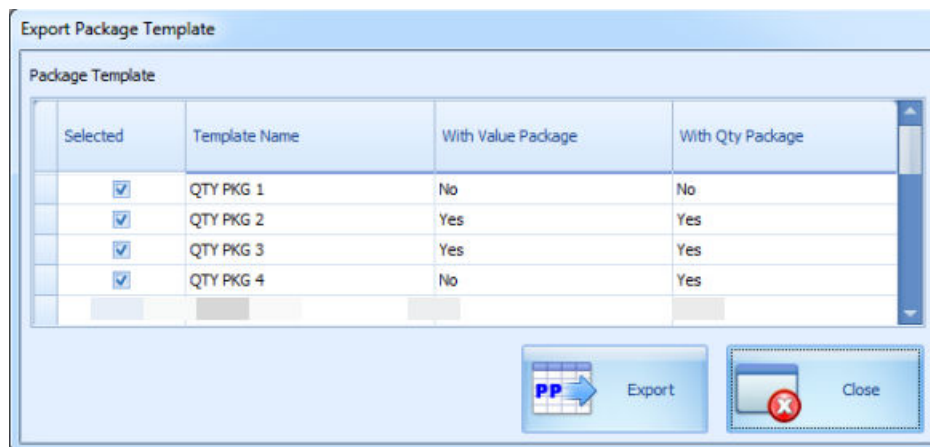


To Export a Template,

1. Log in to **OHC Tools** and select **Import/Export** tab.
2. Click the **Export Package Template** on the ribbon bar.
3. **Package Template XML** list is shown and available for export.
4. By default, all the packages template in the XML file are selected. To de-select, uncheck the line item in **Selected** column.
5. Click **Export** to export the package template.

- Choose the file location and file name to export to, and then click **Save**.

Figure 10-26 Export Package Template Screen



User Security Group

This section describes the user security access group for Package Plan handling. The security privileges are assigned in the **User Security** module.

Table 10-5 Package Plan Functionality Access Rights

Security Reference No	Description
256	Package Plan Configuration
257	Template Setup
258	Package Plan Setup
4542	Management Module - Unposted Package Posting
590	Management Module - Package Plan Assignment
591	Management Module – Package Plan Status
4648	Management Module – Package Plan
4203	Data Import Module – Advanced Package Plan
4494	Data Import Tools – Import Package Template
4495	Data Import Tools – Export Package Template

Scenarios

This section describes the various behavior of the posting, depending on the package plan setup.

Package Posting Sequence from Micros Interface

When the posted item exits in all the group set in the Micros Item postings, the quantity will be deducted in the following sequence:

- Menu Item

- Family Group
- Sales Itemizer
- Major Group
- Normal Invoice Posting

Gift Card Posting with Insufficient Value

In the event where the Gift Card has insufficient value,

1. For Quantity base package, System will post the charge to the cabin as normal posting.
2. For Department base package, System will post to Department package posting if the Department exist. Otherwise it will post as normal posting.

Posting with Item and Department Package in the Same Check

In the event where package plan has parameter, **Package, Max Item Per Check is <> 0** define, System will **always deduct** the Item quantity first, then department package.

Package Status - to Change the Item Package Posting to Normal Posting

With parameter, **General, Enable Package Auto Balance** value set to 0:

- You are allowed to move the item package posting to normal posting. When the posting is moved back to as package posting, it will become a Department package posting, if the Department package posting is available.

11

Maintenance Code Setup

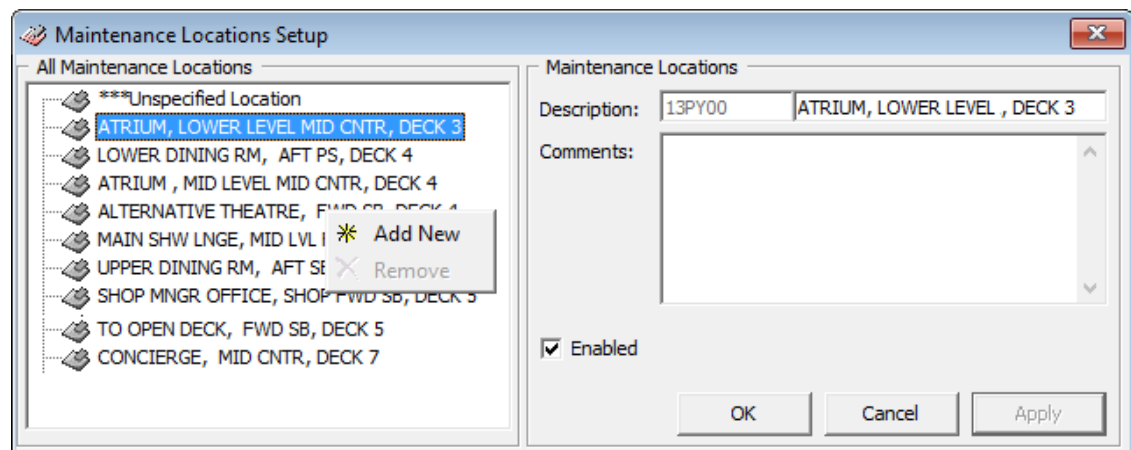
In the Maintenance Code feature, you can customized the locations, task codes, work order type used, workers within the workgroup, items used for repair and maintenance and the priority order for the task.

The steps to configure the codes below are the same while other codes such as [Workers in Workgroup](#), [Task Code](#), and [Items](#) require more steps.

- **Location Codes:** Define the location that requires maintenance work outside the cabins.
- **Work Order Type:** Define the type of maintenance work required.
- **Priority:** Define the work order priority.
- **Location Usable Status:** Define the location availability.

Setting Up Maintenance Codes

Figure 11-1 Maintenance Locations Setup



1. From the Maintenance Setup menu, select the **Locations**.
2. Right-click the **left pane** and select **Add New**.
3. Enter a **code**, **description**, and **comment**.
4. Click **OK** to save

You can also use the Customized Location as a sub-category, to further define the location, for example, vending machine at bar area, open shower at Pool Deck.

1. From the Maintenance Setup menu, select the **Customized Locations**.
2. Right-click the left pane and select **Add New**.
3. Enter a code, description and comment.
4. Click **Apply** to save.

5. Right-click the newly created location and select **Add Location** or **Add Category**, depending on your requirement.
6. Enter a code, description and comment.
7. Check the **Crew Supervision Assignment** if that task requires supervision.
8. Click **OK** to save.

Workers in Workgroup

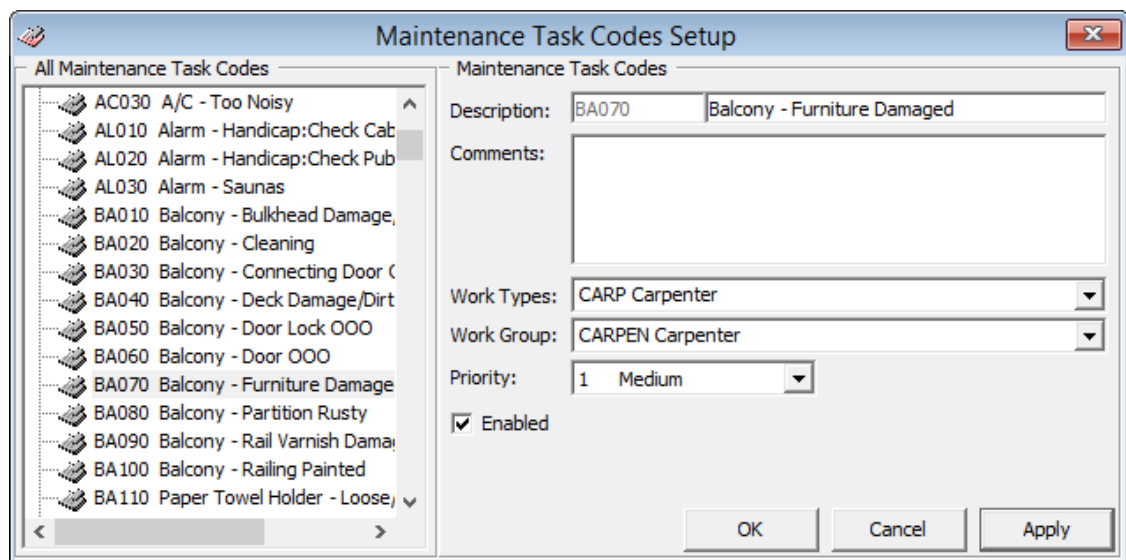
The Worker in Workgroup is a sub-category of Work Order Type, where workers are grouped according to their skills and expertise.

1. Select **Workers in Workgroup** from the Maintenance Setup menu.
2. Right-click and select **Add Group**.
3. Enter a **code**, **description**, and **comments**.
4. Click **Apply** to save.
5. Right-click on the newly created **code** and select **Add Worker**.
6. Select to **Assign by Crew** or **Assign by Operation Position**, then select the **crew name** or **position** from the **Name** field.
7. Enter a **description** and click **Apply** to save.
8. Click **OK** to close the window.

Adding Task Code

The Task Code is used to define the required task, crew involved, and task priority.

Figure 11-2 Maintenance Task Codes



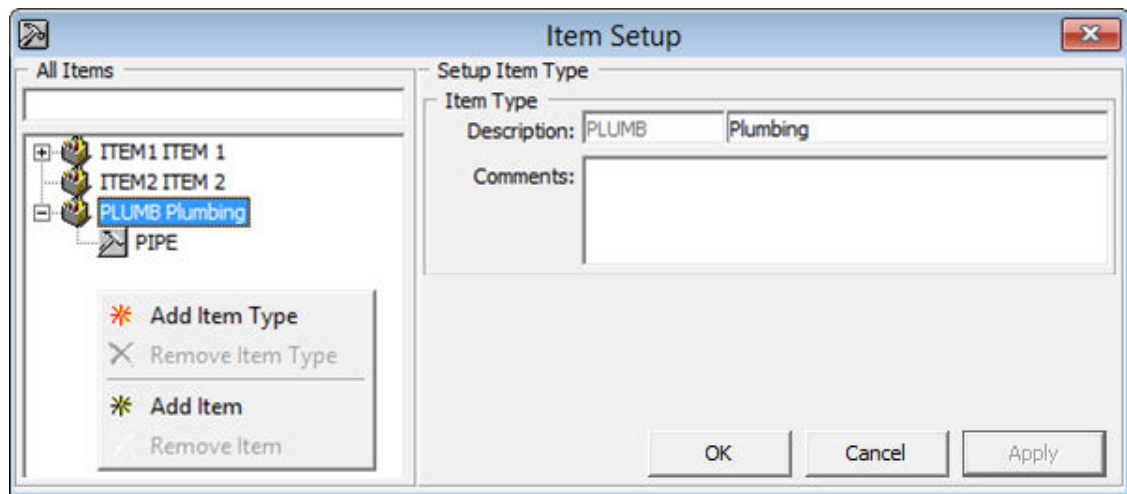
1. Select **Maintenance Task Code Setup** from the Maintenance Setup menu.
2. Right-click and select **Add New**.

3. Enter a **code**, **description**, and **comments**, and then select the **Work Types**, **Work Group** and **Priority** from the drop-down list.
4. Click **Apply** to save.

Adding Items Code

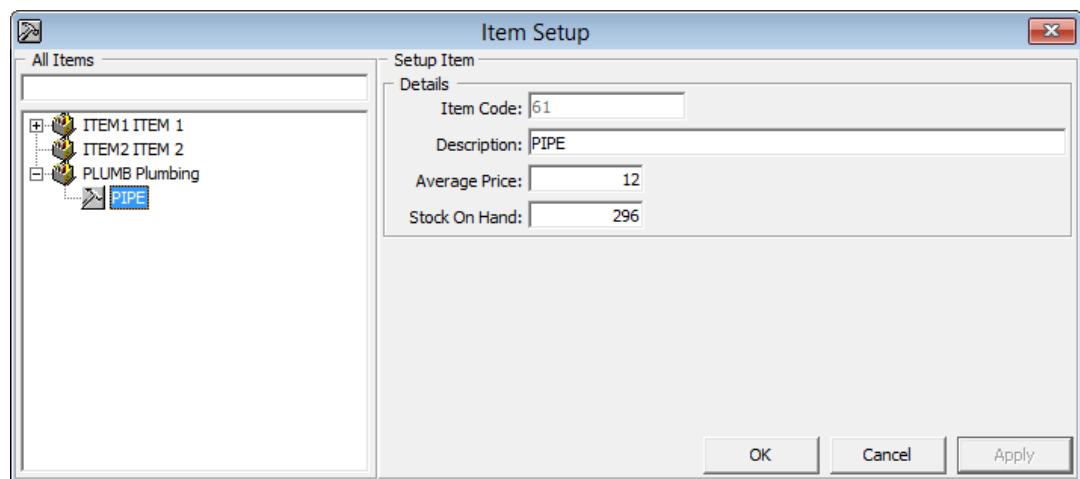
The Item codes is used to describe the items required for repair work. You can add a cost and inventory to the items.

Figure 11-3 Maintenance Item Setup



1. Select **Items** from the Maintenance Setup menu.
2. Right-click on the **left pane** and select **Add Item Type**.
3. Enter a **code**, **description**, and **comments**.
4. Click **Apply** to save.

Figure 11-4 Maintenance Item Type



5. Right-click on the newly created **item code** and select **Add Item Type**.
6. Enter the **Item Code**, **Description**, **Average Price**, and **Stock On Hand**.
7. Click **OK** to save.

12

Gift Card

Gift card is used as a consumer incentive or integrated into a reward point program to increase the sales volumes. The Gift card can also be given and used as a pre-paid credit while on-board the ship.

For more details on Gift Card setup and usage, see *Gift Card Handling Guide*.

13

POS Discount

There are two methods of setting up the POS discount:

- A Basic Setup with discounts applicable to the MICROS discount itemizer level.
- An Advance Setup with discounts applicable to the MICROS major group, family group, and menu item level.

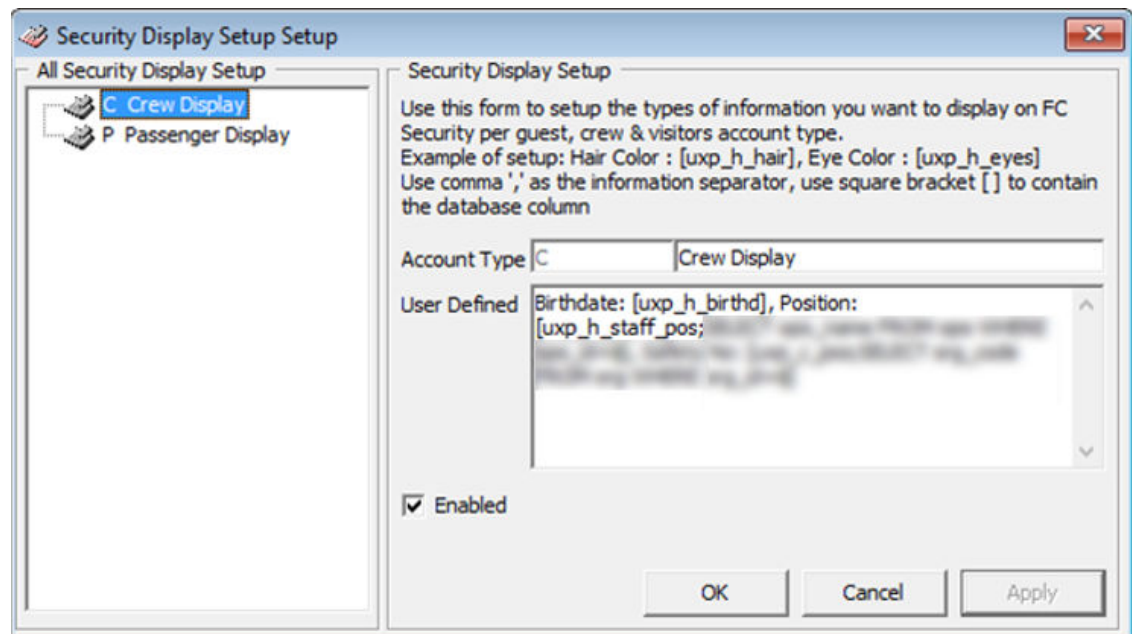
You can choose to set up with one or both methods to provide for different type of discounts. The POS Discount Handling guide provides more information on configuring the discounts, linking the MICROS Server, and usage.

14

Security Display Setup

In Security Display Setup, you can customize additional information for display in the Security WPF module. To use these customized fields, you must insert the precise data field names.

Figure 14-1 Security Display Setup Window



1. Select the **Security Display Setup** from the Administration menu.
2. Right-click the space on the left panel and select **Add New**.
3. In the Account Type field, enter a **code** and **description**.
4. In the **User Defined** field, insert the name field, followed by the data field name using the square bracket []. Use a comma(,) to separate the field.
5. Click **Apply** to save.

15

Visa Type Setup

In the Visa Types Setup, you can create the type of travel visa recognized by the ship.

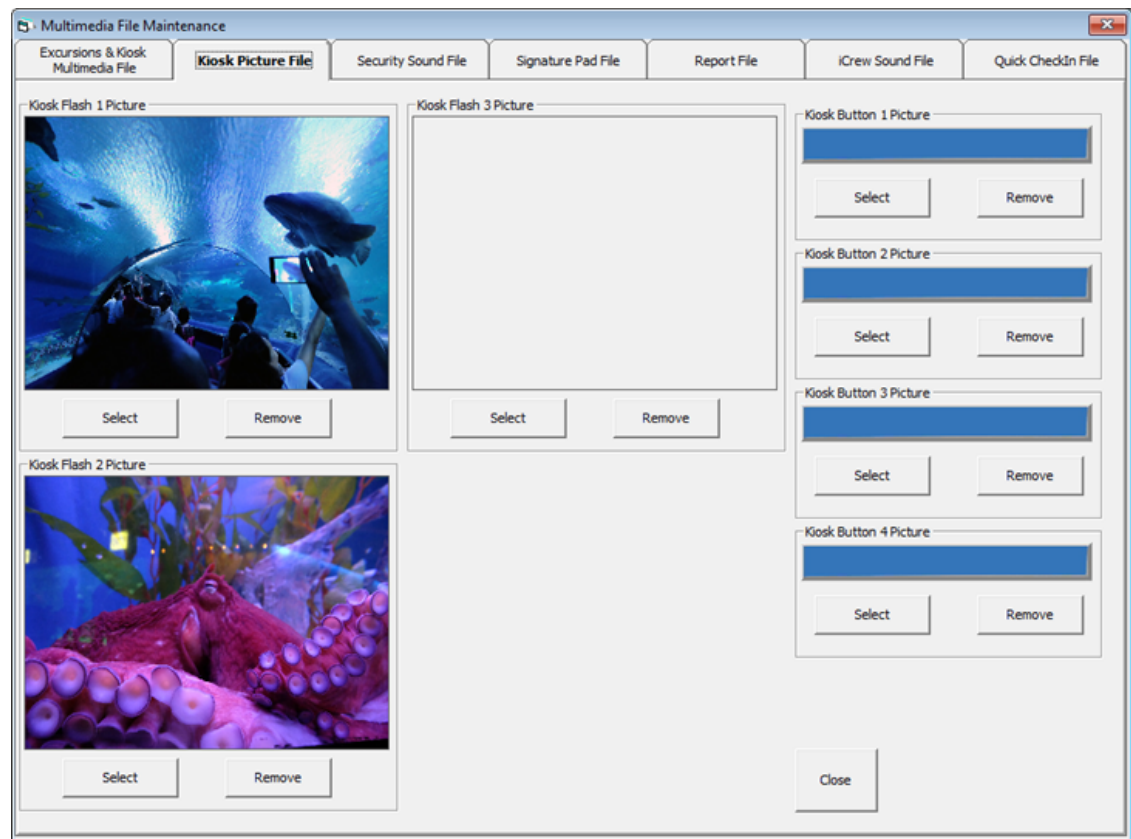
1. Select the **Visa Type Setup** from the Administration menu.
2. Right-click the space on the left panel and select **Add New**.
3. Enter the **Code**, **Description** and **Comment**, if any
4. Click **OK** to save.

16

Multimedia File Maintenance

The system supports use of multimedia file such as .AVI or MP3 for promotion presentation, alerts or as a standard template use on signature device. You can also link a web page for ease of access.

Figure 16-1 Multimedia File Setup



1. Select the **Multimedia File Maintenance** from the Administration menu.
2. Navigate to the tab where you wish to add the multimedia file or image.
3. Click **Select** and choose the file from the window explorer.
4. Click **OK** to save.
5. Click **Play or Preview** to view the file.

17

Board Card Printing Template

This feature allows you to set up predefined information to print on the board card.

Figure 17-1 Board Card Batch Printing Template

The screenshot shows the 'Board Card Batch Printing Template Setup' window. The 'General' tab is active. The 'Description' field contains 'VIP'. The 'Card Type' is set to 'Prompt'. The 'Made a copy of the existing card (Guest Cards Only)' section has 'Prompt' selected. Under 'Custom Report Template (Optional)', 'PaxCardPic1' is selected for 'With Picture' and 'PaxCard1' for 'Without Picture'. The 'Shore Res ID' is set to 'Prompt'. The 'Age' field is set to 'Prompt' with a range from 18 to 299. The 'Cabin' and 'Manifest' fields are also set to 'Prompt'. The 'Reservation Status' is set to 'Predefine Reservation Date' with the date '08/01/2016'. The 'Card Encoded Status' is set to '0-Prompt'. The 'Group Name (For Group Cards Only)' and 'Name' fields are set to 'Prompt'. The 'Nationality', 'Product', 'Pre-product', and 'Award Level' fields are all set to '(All)'. At the bottom, there are buttons for 'Copy', 'Paste', 'OK', 'Cancel', and 'Apply'.

Table 17-1 Board Card Batch Printing Template Field Definition

Field Name	Description
Description	Template Name.
Card Type	Type of card to print, for example: Guest, Crew, Group, Visitor, Gift Card or Prompt to define the criteria in Advance BCard Printing window.
Make a copy of existing card	Prints board card with the same account ID or new account ID.

Table 17-1 (Cont.) Board Card Batch Printing Template Field Definition

Field Name	Description
Custom Report Template	Prints board card using customized report template instead of System Default report. Report template must be available when setting up the Board Card Template setup.
Shore Res ID	Prints board card by Shore Reservation ID.
Age	Prints board card by age range.
Cabin	Prints board card by cabin range.
Manifest	Prints board card by manifest number range.
Reservation Status	Prints board card by reservation status: • Checked-In • Prompt Reservation Date — A user define date in Advance BCard printing window at time of printing. • Pre-define Reservation Date— Prints according to date set in the template.
Group Name	Prints board card by Group Name and applicable to Card Type = Group
Name	Print board card by name range.
Nationality	Prints board card for: • All nationalities • US Citizens only • Non-US Citizens
Product / Pre-Product / Award Level	Prints board card by Product: • All (Field value is both null and not null) • . • Only when specified (Field value is not null). • Only when not specified (Field value is null) • .

Figure 17-2 Board Card Batch Printing Template-User Define Filter

Board Card Batch Printing Template Setup

General User Define Filter(1-3) User Define Filter(4-5) Sorting

User Define Filter 1

Description: VIP Status

Field Name: [Text Box] Validate Field

☒ Prompt ☐ User Define

SQL Query for reference (Leave Blank for manually enter) Validate SQL Query

User Define Filter 2

Description: [Text Box]

Field Name: [Text Box] Validate Field

☒ Prompt ☒ User Define WITH

SQL Query for reference (Leave Blank for manually enter) Validate SQL Query

User Define Filter 3

Description: [Text Box]

Field Name: [Text Box] Validate Field

☒ Prompt ☐ User Define

SQL Query for reference (Leave Blank for manually enter) Validate SQL Query

Copy Paste OK Cancel Apply

Table 17-2 Board Card Batch Printing Template User Define Filter Field Definition

Field Name	Description
Description	Name of the Filter.
Field Name	Field name to filter. Reference to field name of System Data table.
SQL Query for reference	Additional Filter using SQL Command.

Figure 17-3 Board Card Batch Printing Template Sort Options

Board Card Batch Printing Template Setup

General User Define Filter(1-3) User Define Filter(4-5) Sorting

Sorting ☒ Prompt ☐ Predefine

Sorting 1: RES_CAB Sorting 1 custom SQL Validate SQL Query

Sorting 2: UXP_A_NAME Sorting 2 custom SQL Validate SQL Query

Copy Paste OK Cancel Apply

Select one of the following two sort options:

- Prompt User when printing the board card.
- Pre-define by field using Custom SQL.

Creating Board Card Printing Template

1. Select **Board Card Batch Printing Template** from the Administration menu.
2. At the Board Card Batch Printing Template Setup window, right-click and select **Add Template**.
3. Enter the name of the template in the **Description** field and select the **Card Type** from the drop-down list.
4. Check the applicable prompt button when generating the card or use the predefined option. If you choose to use the **Predefine** option, enter the value in the field next to it.
5. Click **Apply** to save the selection and navigate to the **User Define Filter** tab.
6. At the User Define Filter, enter or do the following:
 - a. The filter name in the **Description** field.
 - b. Field name (reference to System data table) or
 - c. Check the User Define radio button and insert a value.
7. Click the **Validate Field** to verify.
8. Use the **SQL Query** to filter the fields further by inserting the SQL Command and then click the **Validate SQL Query**.
9. Navigate to the Sorting tab and select the sorting type.
10. Click **Apply** to save the filter.
11. Click **OK** to save the template.

Removing Template

You can remove a template by right-clicking the **Template name** and selecting **Remove Template**.

18

Security Alert Setup

You can set up a security alert at a check point for when there is a security breach. This feature is configured only by the Implementation team. Please contact Oracle Hospitality Customer Support if you wish to use this feature.

19

Beeper Setup

The Beeper Setup feature enables you to configure the beeper number for use in the Child Location function. You can configure the beeper unit using the same steps as System Codes. See [System Codes](#) for more information.

Security

In this Security function, you can find information such as User Login, Statistic Count for the passengers on-board or at shore, and Port/Visa Requirement

Login

The Login Function enables you to log into and out of the current session using either a Function Key **(F8)** or by selecting the option from the Security menu.

User Logfile

The User Logfile records all transactions performed by users in date/time order. You can retrieve the information using the available fields such as By User, Type of Activities, Date, Time or Workstation. The transaction log is printable and exportable.

Gangway Logfile

The Gangway Logfile records all the gangway movement for all passengers going ashore or coming onboard. You can search the information by location, movement directions, type of passengers, date, time, cabin number, and name. Information is printable and exportable to a supported file format.

Count Onboard/Shoreside

The Count Onboard/Shoreside gives you a total passenger count of those who are onboard or ashore and by the type of passenger you select. This count can be reset by clicking the **Reset Security** button.



Note:

Do pay attention to the message prompt when resetting the status as the message in each prompt is different.

Guest/Crew Onboard

Figure 20-1 Current Guest/Crew Onboard Listing

Show People Currently Onboard

Cabin	Name	Nationality

Page Up Check-out Resident

Show

☐ All

☒ Only Guest

☐ Only Resident

☐ Only Crew

☐ Only Visitors

☐ Only Check-Out onboard

Last Coming On-board on 13/01/2015 16:29:46

Gangway Log Go Ashore Page Down Close

The Guest/Crew Onboard lists all passengers onboard and display the last time-stamp of the last passenger who comes onboard.

- Clicking **Go Ashore** sets the selected passenger status from Onboard to Ashore.
- Clicking the **Gangway Log** opens the Gangway movement log.

Guest/Crew Shoreside

This function is the same as the Guest/Crew Onboard, and only displays passenger's who are Ashore.

- Clicking **Go Onboard** sets the selected passenger status from Ashore to Onboard.

Port/Visa Requirement

This function restricts passengers who has travel restrictions on their travel documents from going ashore on port day. Once this is set up, when restricted passengers swipe their travel document at the Gangway, and you will receive a system prompt.

Figure 20-2 Port/Visa Requirement Window

The screenshot shows the 'Port/Visa Requirement' window. The 'Setup' section contains fields for 'Date & Time From' (27/8/2015 00:00:15), 'Date & Time To' (27/08/2015 23:00:00), 'Remarks' (empty), 'Port' (not applicable), and 'Apply To' (Pax and Crew selected). The 'Conditions' section has 'Nationality' (MY Malaysia) and 'Visa Type' (B2 Tourist Visa). Below these are buttons for 'Add New', 'Delete', 'Save', and 'Close'. A table below the buttons shows a single entry with Nationality 'CU', Visa Type 'D', Start From '27/08/2015 00:00:01', Until '28/08/2016 23:00:00', and Remarks empty. An 'Insert Confirm ?' dialog is overlaid, displaying an information icon and the message: 'Nationality of MY Malaysia without document B2 Tourist Visa not allowed for port entry From 27/8/2015 00:00:15 To 27/08/2015 23:00:00'. The dialog has 'Yes' and 'No' buttons.

Nationality	Visa Type	Start From	Until	Remarks
CU	D	27/08/2015 00:00:01	28/08/2016 23:00:00	

1. From the Security options, select **Port/Visa Requirement**.
2. Click **Add New**.
3. Enter the **Date/Time From/To** field and select the **Port** from the drop-down list.
4. Select the applicable passenger type.
5. In the Conditions Setup section, select the **Nationality** and **Visa Type** from the drop-down list.
6. Click **Save**.
7. At the Insert Confirmation prompt, select **Yes** to confirm, then click **Close** to exit.

21

Photo Setup

The Photo Setup allows you to configure the photos of the Guests, Crews, Visitors and Staffs. To access the functionality, go to the **Administration** menu and select from the following:

- Upload Photos
- Export Photos
- Export Documents

Upload/Export Photos

Upload Photos

The Upload Photos allows you to upload photos either by batch or individually using the following steps:

Figure 21-1 Upload Photos

Upload Photos

This process will upload photos either by batch or individually. Select the method to upload below.

Name Lists

Account Categories

☐ Guests

☐ Crew

☐ Visitors

Account Status

☐ Expected

☐ Checked-In

☐ Checked-Out

Batch Upload

Select the file directory which contains files to upload to the listed accounts above:

File location: **Browse**

☐ Delete files from the directory after upload **Upload**

Individual Upload

Select the individual file to upload to the selected account above:

File location: **Browse**

☐ Delete file from the directory after upload **Upload**

Upload file format: **RES_ACC** **Close**

1. Click the **Administration** option from the main menu.
2. Select the **Photo Upload** option from the menu.
3. At the Upload Photos form, select the **Account Categories** and **Account Status**.
4. Click the **Scan** button to populate the names under the Name Lists section.
5. Browse the file location that contains the files to upload.
6. Select the **Upload file format** from the drop-down list.

 Note:

If you are uploading the photos using the RES_ACC format, ensure the file name is the same as the guest booking number.

7. Check the **Delete files from directory after upload** and then click **Upload**.
8. Click **Close** to exit.

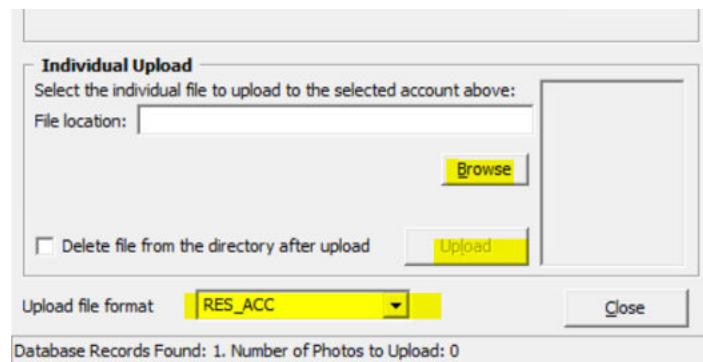
Batch Upload

For batch upload to work, you need to rename every single photos of the person with the folio number so that the system recognizes them. The photos will not update correctly if you name them wrongly. For example, picture name is “123456.jpg” for folio number 123456. Once you complete renaming the photos, you can proceed to upload using the following steps:

1. Repeat the above steps.
2. At the Batch Upload section, browse and select the **folder path** where the photos are stored.
3. Click the **Upload** button and the photos upload with their unique ID, which is the reservation account number.

Individual Upload

Figure 21-2 Individual Upload



1. For **Individual Upload**, select the file path where the photo is stored.
2. Click the **Upload** button and you will see the photo on the bottom right corner.

Export Photos

This function allow you to export the photos by guest type and account status. You must have Security Access rights **#338 — Export Photos in Single or Batch** to perform this function.

Figure 21-3 Export Photos

Export Photos

This process will export photos to selected file directory.

Customize Export

Search for the file to export:

File location: C:\ Browse

Name/Cabin:

Select the following categories of photos to export

☒ Guests ☐ Crew ☐ Visitors ☐ Staff

Export File Name:

☒ Save using unique id ☐ Save using crew external id

☐ Save Using Custom ID ☐ Save using crew internal id

Account Status

☐ Expected ☒ Checked-In ☐ Checked-Out

☐ All Date ☒ Specific Embarkation Date Range

From 9 /23/2011 To 9 /23/2011

Scan

1. Select the **Export Photo** option from the Administration menu.
2. At the **Export Photos, Customize Export** section, browse and select a destination location.
3. Select the categories to export by selecting the respective check boxes.
4. Select the **Export File Name**. You can select from:
 - Save using unique ID (The unique ID is the reservation account number).
 - Save using custom ID.
 - Save using crew external ID.
 - Save using crew internal ID.
5. Select the **Account Status**.
6. You can either select **All Date** or specify a date range.
7. Click **Scan** to begin.
8. A list of names will populate in the Name Lists section.
9. Individually select the account you wish to export or click the **Check All** option to export all.
10. Click **Export** to begin export.

Export Document

This feature enable you to export documents to a support file format. The steps to export the document is the same as Export Photos. See [Upload/Export Photos](#) for steps to export the document.

SMTP Setup

The SMTP Setup allows you to set the email server settings to support sending of outgoing email in SPMS

System Parameters

The parameters that stores the SMTP Setup Settings are listed under parameter group "Promo"

Table 22-1 SMTP Parameters

PAR Group	PAR Name	PAR Value	Description
Promo	SMTP Server IP Address	e.g. Webmail.xxx.com	The SMTP server name or IP address
Promo	SMTP Server IP Port	e.g. 25	The SMTP server port
Promo	SMTP Server Require Login Authentication	0 : No 1 : Yes	Setting to determine if login is required before SMTP server can send out email.
Promo	SMTP User Name	e.g. user123	Only valid if login required.

SMTP User Password

The SMTP User Password is configured in OHC Tools. You may refer to the section "*Change Password*" of [OHC Tools](#) user guide.

TLS 1.2 Setting for Windows

The SMTP Server on Windows are required to support secure connection. Minimally, TLS 1.2 is required. To configure TLS 1.2 on Windows, see Knowledge Article [DOC11966](#) for more information.