Oracle Hospitality Cruise Shipboard Property Management System

User Guide



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Preface

Oracle Hospitality Cruise Shipboard Property Management (SPMS) is a central database containing all guest and crew information, enabling cruise operators to handle individual guests, groups, ship's crew, staff, and temporary visitors. It simplifies all passenger and crew handling procedures by managing all relevant personnel information on the central database for easy profile access. Loyalty program numbers, emergency or temporary contact details, cabin numbers, complaints and comments are all included in the profile record. That record is used to produce the ship's onboard identifier card that can be used by passengers, crew and visitors. SPMS also efficiently manages financial information. It can manage multiple invoices and credit cards, routing and discount instructions, handle automated discounting, automated bill handling for check-out and enable the operator to offer paperless invoicing by email. SPMS tracks critical crew information with customized cards that allow access to: completed courses and certificates, warnings, promotions/demotions, medical exams, uniforms, crew effects, items issued to each crew member, previous contracts, and safety drill and travel documents.

The system also facilitates visitor handling. With SPMS, operators can easily make a reservation, read/scan a passport, take a photo and immediately print a board card. Onboard passenger and crew safety are of the utmost importance to cruise operators, and SPMS plays a critical role in developing your muster list – specifically tracking safety department/group/role, safety duties, muster stations and life boats. The system can be used to assign safety positions to crew, manage safety fire drill scheduling and attendance, and event barcode scan crew to track attendance for training drills. As the ship's central data hub, SPMS offers many modules to help manage all aspects of the cruise operation.

Audience

This document is intended for project managers, application specialists and users of Oracle Hospitality Property Management System.

Customer Support

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

https://iccp.custhelp.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screenshots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at https://docs.oracle.com/en/industries/hospitality/cruise.html.

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Revision History

Date	Description of Change
October 2025	Initial publication.

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Part I
Embarkation

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1

Advance Quick Check-in

Advanced Quick Check-In module is designed to help check guests in quickly and easily. It is customizable and offers both standard and wizard formats to get started fast. Advanced Quick Check-In enables operators to collect all required information for guests in one centralized profile, for example, travel document scanning as well as photo capture.

Setting Up AQCI

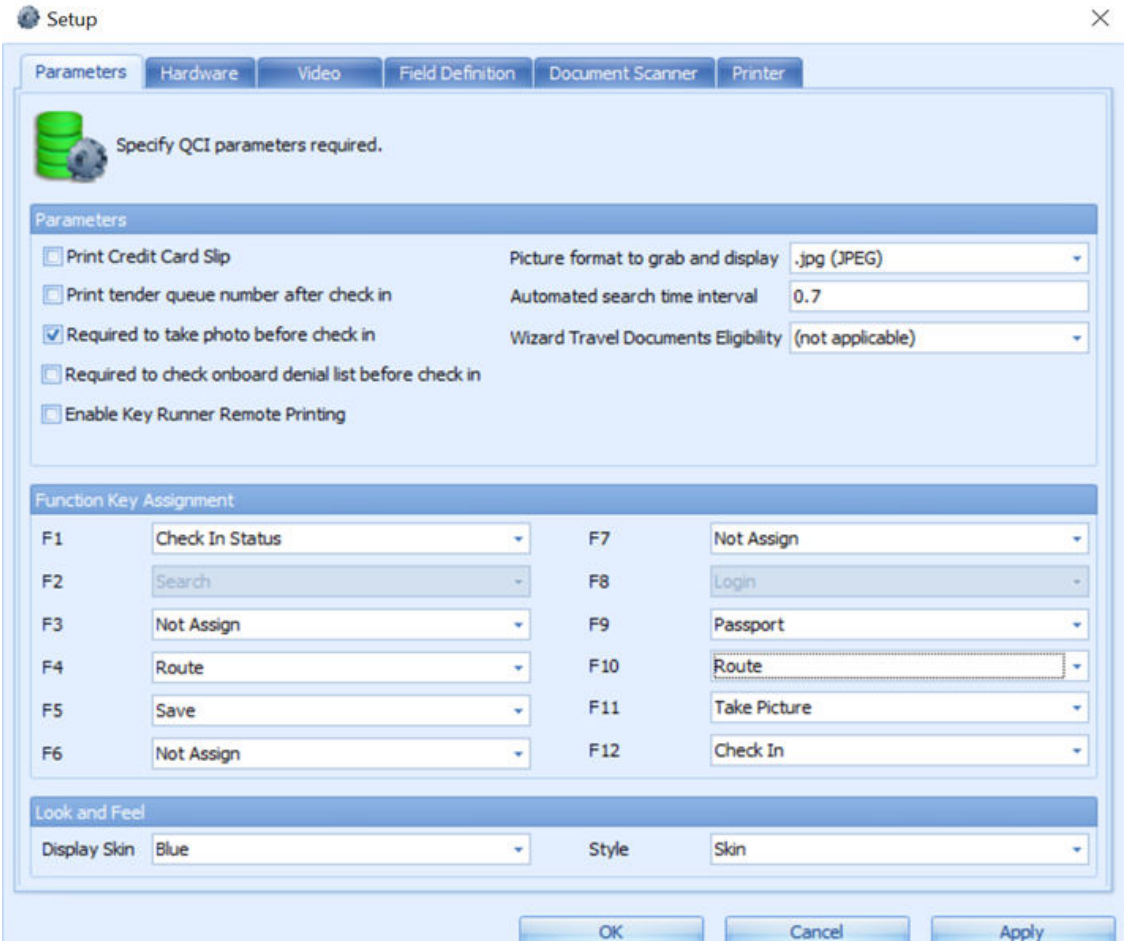
In the AQCI Setup tab, you can configure the related parameter and hardware used by the ship. It features General Setup, Terminal Setup, Wizard Travel Rules, Save Layout, Restore Default Layout, and Layout Feature.

General Setup

The General Setup section provides all the general settings for use in the Advance Quick Check-In Module (AQCI), and the available tabs are described below:

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Figure 1-1 AQCI General Setup



Parameters

To enable the parameters, at the Function Key Assignment section, assign the function keys according to the ship operator requirements.

Hardware

You can specify the required devices such as Card Reader, Barcode Reader, Signature Devices, Passport Reader and Special Settings in this tab.

Video

The system is pre-configured with a video format and you can adjust settings according to the device used in this function.

1. Click **Video Format** tab, adjust the necessary fields and click **Apply**.
2. Click **Capture** to preview the video display.

Field Definition

To define the required entry fields in the reservation screen, you can select the available checkboxes.

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- **Required Field:** This sets the field as mandatory, and you must enter a value into this field.
- **Editable Field:** This field appears on the reservation screen and is editable, but not mandatory.
- **Required Per Cabin:** If you select this field, it becomes required for that particular cabin and use per the following scenario:
  - Either one of the checked-in guests in the same cabin have entered the required field.
  - Either one of the checked-in guests or expected guest in the same cabin have entered the required field.
  - Both expected check-in guests and expected debarking guest in the same cabin have entered the required field. The message will not prompt for the expected debarking guest if the expected checked-in guest has the required field entered. The program checks the required field for the expected check-in guest even though the expected debark guest has the required field entered.
  - The program takes **Required Field** as priority if both the **Required Field** and the **Required per Cabin** option is checked for the field.

Document Scanner

You can assign a document scanner to each document type use in AQCI.

1. In **Predefined Document Type**, select the specific document type from the drop-down list, and in **Scanner**, select the preferred scanner.
2. Click **Apply** and continue to define the next document type.
3. To remove the scanner assignment from **Predefined Document Type**, select the document type from the drop-down list and click **Reset**.

Printer

In this section, printers such as Board Card Printer, Credit card slip printer, or encoder are configured for use in AQCI. To configure, select the specific printer from the drop-down list and click **Apply**.

Setting Up a Terminal

Terminal Setup is where you configure the client workstation that runs the AQCI. It is used to load the saved layout or share it with certain workstation if it is specified to be shared. The **Name** field in the Setup Form indicates the PC Name or the PC IP Address.

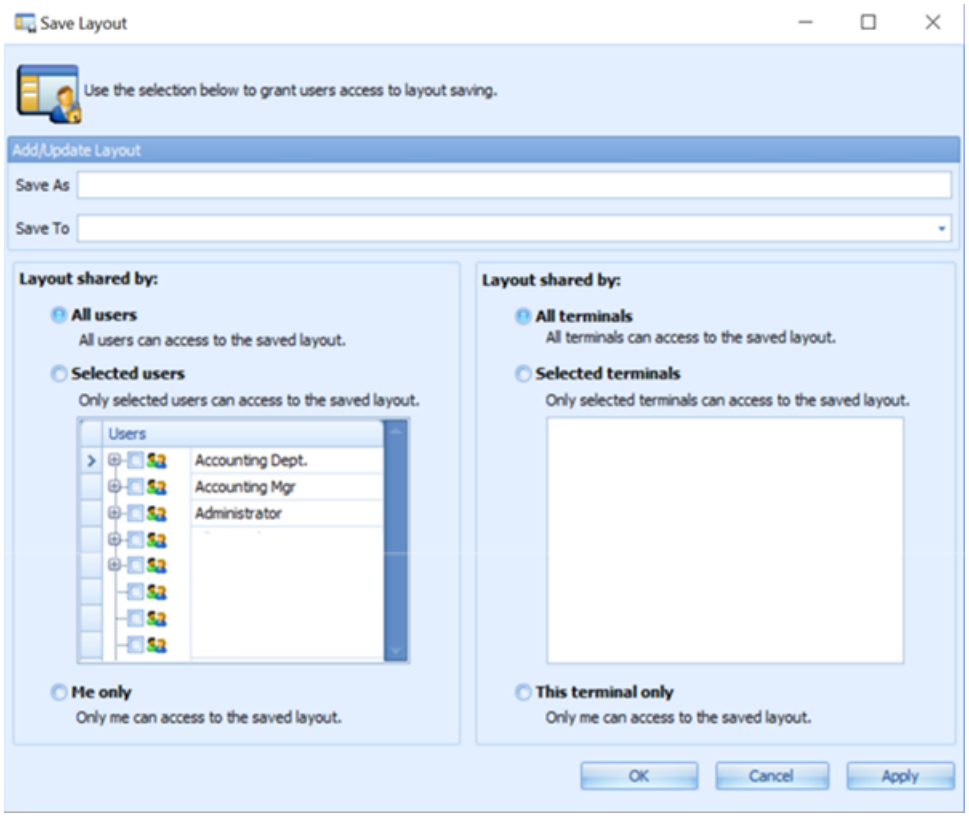
1. Click **Add** to add a new terminal workstation.
2. Enter a mandatory **Code** field and **Name**, followed by the **Terminal Name**.
3. Insert the comment in the **Comments** field, if any.
4. Click **Save** to save the information.
5. Click **Delete** to delete the terminal workstation that you no longer require.
6. Click **Close** to exit the setup window.

Saving a Layout

The layout selection allows you to save and grant a specific user or terminal to a layout designed to accommodate the check in process at each location.

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Figure 1-2 Save Layout



- For a new layout, you can select **Save As** to define the layout name, and click **OK** to save.
- For an existing layout, you can select **Save To** and update the existing layout from the drop-down list.

You can share the layout using the following options:

- **All Users:** All users can access the saved layout.
- **Selected Users:** Only selected users can access the saved layout.
- **Me Only:** Only the logged in user can access the saved layout.
- **All Terminals:** All terminals can access the saved layout.
- **Selected Terminals:** Only selected terminal can access the saved layout.
- **This Terminal Only:** Only for this particular terminal can access the saved layout.

Restoring Default Layout

The Restore Default Layout restores the entire check-in screen to the system default layout.

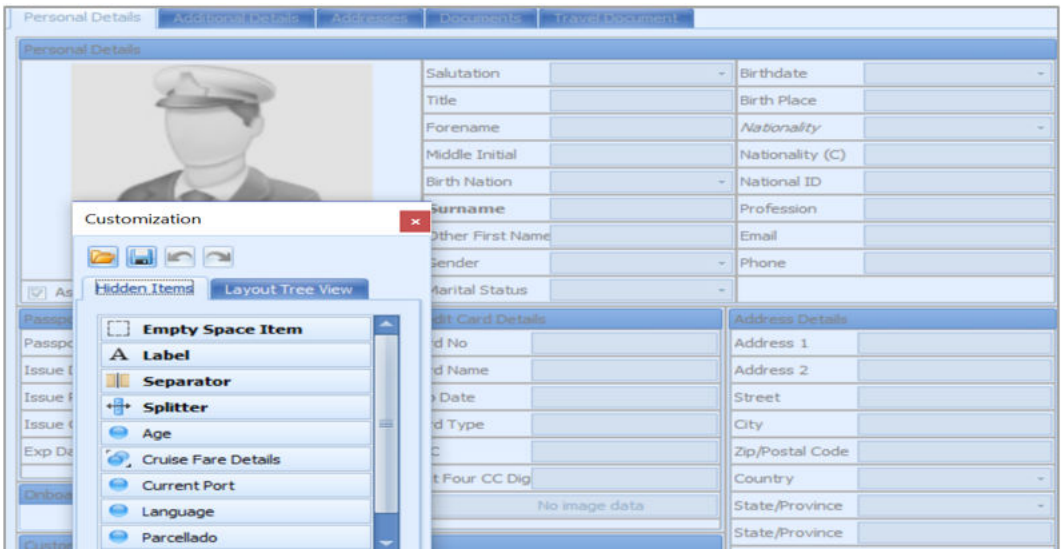
To reset the layout, click the **Restore Default Layout** button on the ribbon bar and click **OK** after the restore completes.

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Customizing a Layout

All ship operators have the option to design their Check-in screen layout according to their users, user group, or workstation. In the Customize Layout option, drag and drop objects to customize the layout.

Figure 1-3 Layout Labels



1. At the AQCI main screen, right-click in any blank space in the **All Details Tab**.
2. Select **Customize Layout** to open the **Customization** window and switch the AQCI form to Disable mode.
3. To remove a field from the All Details form, highlight the field until a dotted outline appears around the element.

Figure 1-4 Selected Label



4. Drag and drop the selected field into the **Customization, Hidden Items** tab to remove the field from the AQCI Check In form.
5. Once the layout is finalized, click the **X** to close the Customization window and return to AQCI Enable mode.

Restoring Field/Group

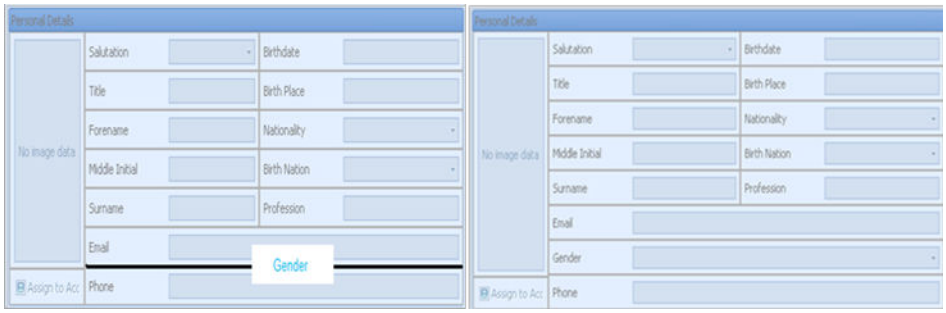
In order to restore a field or group back to the Detail screen, you must switch the layout mode to **Disable**.

1. At the **Customization window, Hidden Items** tab, highlight a field or a group from the Hidden Items list.

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2. Drag the field or group to the AQCI form and drop the item(s) at the desired location. The new location of the field or group depends on where the splitter line is.

Figure 1-5 Layout Field Splitter



Renaming a Field Name

1. Select a field then right-click to select the **Rename** option. The field label is now enabled for editing.
2. Rename the label with a new name and click **Enter** to save.

Layout Features

The Layout Feature in Setup tab allows you to **Import, Export,** and **Remove** the specific layout required by the users. In **Layout Change**, the default layout is the **last saved** layout, if multiple layouts exist for the user.

Importing a Layout

1. From the **Import** screen, browse the XML file you want to import into the database.
2. By default, the **Export template with XML file default users and terminals** is selected. Deselect the check mark to share the template with **Selected Users, an individual, Selected Terminals,** or **This Terminal only**.
3. Click **Import**.
4. At the notification prompt, read and understand the message, then select **Yes** to complete the process.

Exporting a Layout

The Export feature allows you to export the saved template and layout to an XML file format for use in the same or different database. In the Template Export screen, you can export the layout based on the following options:

- Export all templates created by the user.
  - This exports the template created by the current logged-in user. For example, Template A is created by user A. Template B is created by user B. When User A logs in to the system, only Template A is being exported.
- Export all templates can be accessed by the user.
  - This exports the template that are shared by the current logged-in user. For example, Template A and Template B are shared by user A. Template C is shared by user B only. When User A logs in to the system. Only Template A and Template B are being exported.

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Exporting a Template

1. From the Layout Feature window, click **Export**. This opens the Template Export window.
2. Choose the export option from the radio button. If you choose the **Export individual template**, then select the template from the drop-down list.
3. Click **Export** to proceed and select a location to save the file when prompted.
4. Click **Save** to complete the process.

Removing a Layout

The Remove Layout option allows only the creator of the layout to remove the layout from the view. If the layout has been deleted, only users linked to that particular layout can log in to the module to load the original layout.

To remove a layout, select the **Layout Name** from the drop-down list and click **Remove**.

Changing a Layout

The system allows you to share multiple layouts and specify which layout is the default for other users. The last saved layout is the default if multiple layout exists for the user.

To change a layout, select the layout name from the Layout Name drop-down list and click **Reset**.

Resetting Layout to System Default

You can restore a layout to the system default layout by right-clicking on the **Reservation** screen and selecting **Reset Layout**.

AQCI Functions

The Advance Quick Check In (AQCI) module is designed to ease the check-in process using the quick passenger registration and collection of passport details, and by printing the Board Card at the end of the registration. All these tasks are performed from the Home Tab.

Creating a New Reservation

A vast majority of guests arrive with confirmed reservations. However, there are instances where new reservations are added on the spot.

You can create a new reservation and add it to the passenger manifest using the following steps.

1. Click **New** at the ribbon bar.
2. At the Reservation Form, enter all the relevant details manually or scan the passport through the passport scanner.
3. Select the **Notice and Consent** check-box. If this is left unchecked, the system prompts a warning message and prevents you from continuing.
4. Click **Save** on the ribbon bar to save the reservation. The newly created reservation is grouped under the **Expected** reservation category.

Renewing a Reservation

The **Renew** function reactivates a Check-out guest account. To renew a reservation:

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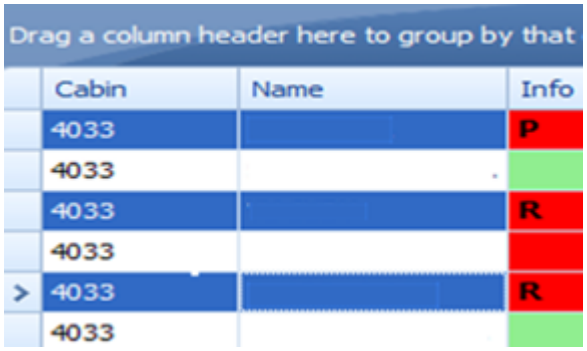
1. Search for the passenger account in the **Account Search** section, select **Reserv Status** as **History,** and select the past **Embark Date** using the date editor.
2. In the results grid, select the **passenger name**, update the **passenger details**, select a **cabin** from the available cabin list, and click **Renew** at the ribbon bar.
3. At the **Information has been changed. Do you want to save?** prompt, select **Yes** to complete the process.

Route

The Route function either routes the charges from or to an account, depending on the routing configuration.

1. At **Account Search** section, search for the guest account and select the desired account by holding the **CTRL+** key or **SHIFT+ key**.
2. At the ribbon bar, click **Route** and select the **account** to route. The first account you select is the Payer, and the Payer account is tagged with the letter **P**. The Routed account is tagged with the letter **R**.
3. To cancel the routing, select the **account** and click **Cancel Route** on the ribbon bar.

Figure 1-6 Route Function



Take Picture

The Take Picture function allows you to recapture the picture of the pre-embark guest or for a new reservation. To take a picture, select the account and click **Take Picture** at the ribbon bar.

Check In

The Check In function checks in the select account(s) and changes the booking status from Reservation to Embark when all passenger information is corrected and updated accordingly.

The system validates the guest mandatory fields based on defined Coast Guard agency requirements in Administration, System Setup, Database Parameter Setup, General, APIS Border Custom Handling. For example, if the parameter value is **CARICOM**, the system validates guest mandatory fields based on parameter **CARICOM, Mandatory Fields For <NONCREW>**.

To check in an account,

1. Search for the account using the selection filters in **Account Search** section.
2. Select the **account** and click **Check In** at the ribbon bar. The system does not allow a check-in into a dirty cabin.

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Print Board Card

The **Print Board Card** prints the cabin board cards at check-in to a printer defined in the Setup, Printer tab.

1. At the selected account, click **Print Board Card** on the ribbon bar.
2. Select the Print Board Card **reason** when prompted and click **OK**. This encodes a card that includes the door lock combination, depending on the type of door lock interface, and the guest details such as cabin number and the embark/disembark date.

Print Passport Label

The Print Passport Label prints an identification label tagged to the passenger's passport. You must configure the supported hardware in Setup, General Setup, Printer, Passport Label Printer. You can also configure the same in Management module, Options, Hardware, Printer. Consult Oracle Customer Support for supported hardware or assistance.

Return Key

The Return Key function enable the Check-in agent to request a key (board card) for a passenger during embarkation from a central location where the keys are stored. This additional printing process help speeds up the check in process by allowing the Key Runner to pull out the key for those passengers, based on the requests stated on the printed receipt.

The keys are physically handed to the respective Check-in agent. To use this function, you must turn on parameters in *Administration module, System Setup, Database Parameter Setup, Enable Key Runner Remote Printing* and *Auto Print Key Runner Receipt*.

The Key Runner process is triggered when you:

- Edit the passenger's passport number.
- Edit the passenger's credit card information.
- Scan the Booking Number barcode.

To trigger Key Runner receipt printing when scanning a barcode, configure these two parameters in *Administration module, System Setup, Database Parameter Setup, Advance QCI*.

- Auto Print Key Runner Receipt = 1
- Extend Search Criteria = RES_BOOKNR
- When searching for a guest, change the search criteria to **Same Booking No**. If the system found three guests with same booking number and same cabin, it prints a single Key Runner Receipt, and three different Key Runner receipts if the cabins are different.
- Guest with the same embarkation date and cabin are printed in a single Key Runner receipt.
- You must configure the Key Runner printer in **General Setup, Printer, Key Runner Printer** and select the required printer from the drop-down list.
- The Return Key is re-enabled at the ribbon bar of the Check In screen once the receipt is printed for the passenger. The receipt prints one time for the same cabin unless you choose to reset the Return Key status. This would then allow you to resend the key request to the Key Runner.

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Figure 1-7 Key Runner Request



Check In Status

You can view the total number of Reservations, Checked-In, and Remaining status of the guests that have not checked-in based on the current date and time.

Copy/Paste Address

The Copy Address function allows you to copy the address from one reservation to another reservation which saves data entry time when both reservations share the same address.

1. At the Passenger Details screen of the selected account, click **Copy Address** on the ribbon bar.
2. Select the account to copy to and click **Paste Address**.

Swipe Passport

The Swipe Passport function allows you to capture the passenger's passport details when a passport is swiped through a passport scanner. You would need to configured a passport reader in *General Setup, Hardware, Card Reader* section.

Guest Detail Overview

The Guest Detail Overview screen is the main screen of the Advance Quick Check In (AQCI) module. This screen not only enables you to search for an account, it also displays the passenger's information in different tabs.

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Account Search

Figure 1-8 Account Search Function



Table 1-1 Field Definition of Account Search

Field Name	Description
Search Criteria	
Same Partial Name	Searches for names containing characters entered in the field.
Same Name	Searches names matching the name.
Name List	Displays names in listing.
Same Cabin	Searches passengers in the same cabin.
Cabin List	Displays cabins by list.
Same Booking Number	Searches reservation matching the booking numbers entered.
Same Group	Searches for passengers in the same group entered.
Same Routing	Searches for passengers in the same routing entered.
Account ID	Search for matching account ID entered.
Account Type	
Guest	Search for record type categorized as Guest.
Crew	Search for record type categorized as Crew.
Visitors	Search for record type categorized as Visitor.
All	Search for record in any above category.
Reservation Status	
Reservations	Filter for Reserved bookings (Expected).
Check In	Filter for all booking that has check in.

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Table 1-1 (Cont.) Field Definition of Account Search

Field Name	Description
All	Filter result for all booking type.
History	Filter for all check-out reservations.

1. At the **Account Search** section, select one of the following criteria from the drop-down list to search for an account.
2. At **Embark Date**, select the required embarkation date using the date editor.
3. Click **Search** to get search results.

Adding/Updating New Personal Details

To add/update the passenger personal details:

1. Repeat steps 1 – 3 of Account Search.
2. Update the relevant fields within the tab and/or other tabs such as Additional Details, Addresses, Documents and Travel Documents.
3. Check the applicable checkboxes, if any, and click **Save** at the ribbon bar to save the details.

Table 1-2 Personal Details Tab

Field Name	Description
Salutation	Salutation of contact person.
Title	Given Title of contact person.
Forename	Forename of contact person.
Middle Initial	Middle Initial of contact person.
Birth Nation	Birth Place of contact person.
Surname	Surname of contact person.
Other First Name	Other First Name of the contact person.
Other Name	Other Name of the contact person. For example: could be the name in Chinese characters).
Gender	Male, Female or Non-Binary.
Marital Status	Marital Status of contact person: ‘D’ Divorced, ‘M’ Married, ‘N’ Newly Wed or ‘S’ Single.
Birthdate	Birthdate of contact person.
Birth Place	Birthplace of contact person.
Nationality	Nationality of contact person.
National ID	National ID number of contact person.
Profession	Profession of contact person.
Email	Email Address of contact person.
Phone	Phone number of contact person.

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Table 1-3 Passport Details Field Definition

Field Name	Description
Passport No	Passport number of contact person.
Issue Date	Issue Date of Passport.
Issue Place	Issue Place of Passport.
Issue Country	Country that issued the passport.
Exp Date	Passport Expiry Date.

Table 1-4 Credit Card Details Field Definition

Field Name	Description
Card No	Credit card number of contact person.
Card Name	Credit card name of contact person.
Exp Date	Credit card Expiry date.
Card Type	Type of Credit card.
DCC	Dynamic Currency Conversion exchange rate.
Last Four CC Dig	Credit Card Last Four Digit.

Table 1-5 Address Details Field Definition

Field Name	Description
Address 1	Address of Contact Person.
Address 2	Address of Contact Person.
Street	Street Address of Contact Person.
City	City Address of Contact Person.
Zip/Postal Code	Zip / Postal Code Address of Contact Person.
Country	Country of Contact Person.
State/Province	State / Province of Contact Person.
State/ Province	State / Province of Contact Person (in US) if user selects the US as the first State / Province.

Table 1-6 Reservation Details Field Definition

Field Name	Description
Other BCard No	Other Board Card Number.
Onboard Card Number	On-Board Card Number.
Shore-G. ID	Shore-G Number.
Res Status	Reservation Status.
Embark Date	Embarkation Date.
Embark Port	Embarkation Port.
Disembark Date	Disembarkation Date.
Disembark Port	Disembarkation Port.

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Table 1-6 (Cont.) Reservation Details Field Definition

Field Name	Description
VIP Status	Any VIP Status.
Guest Type	Type of Guest.
Cabin	Cabin number.
Shore-Res.ID	Shore Reservation number.
Ticket No	Ticket Number.
Insurance Desc	Description of Insurance.
Insurance No	Insurance Number.
Tag	Guest, Crew, Visitor, Staff, or Resident.

Table 1-7 Additional Details Tab Field Definition

Field Name	Description
Cruise Days	Number of cruise days.
No. of Cruises	Number of Cruises.
Group No	Grouping by ID and Description.
Classification	Classification/VIP flag.
PPD Type	Regular Crew, Regular Staff or Service Staff.
Queue ID	Queue Identification Number.
Handicap 01 Code	Handicap Code: ‘01’ Mentally Challenged, ‘02’ End of Cruise (Dependent need accompanies) , ‘BL’ Blind , ‘HA’ Handicapped or ‘WH’ Wheelchair.
Handicap 01 Note	Handicap remarks.
Other Name	Other name of guest.
Cruise Fare Code	Code for Cruise Fare.
Cruise Full Fare	Cruise Full Fare.
Cruise Fare	Cruise Fare.
Cruise Fare Balance	Balance of Cruise Fare.
Award Level	Frequent Cruiser Award Level.
Frequent No@	Royality number.
Ceia No	Card Reader Frequency ID Number.
Ship Email	Ship’s Email Address.
Disc Template	‘LV1’ Disc Template 1 - 10%, ‘LV2’ Disc Template 2 - 15% or ‘LV3’ Discount Template 3 - 100%.
Document Checked	Confirms Travel document is verified at check in.
Completed Online Form	Confirms passenger completed the Online Survey form.
Document Collected	Confirms Travel Document has been collected.
Exclude From Quick Billing Printing	Passenger is excluded from Quick Billing printing.

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Table 1-8 Emergency Contact Details Field Definition

Field Name	Description
Name	Name for Emergency Contact.
Relationship	Relationship of Emergency Contact.
Address	Address of Emergency Contact.
Street	Street of Emergency Contact.
Zip	Zip number of Emergency Contact.
City	City of Emergency Contact.
State	State of Emergency Contact.
Country	Country of Emergency Contact.
Phone	Phone number of Emergency Contact.
Mobile Phone	Mobile phone number of Emergency Contact.
Email	Email of Emergency Contact.

Table 1-9 Temporary Address Details Field Definition

Field Name	Description
Address 1	Temporary Address of Emergency Contact.
Address 2	Temporary Address of Emergency Contact.
Street	Street of Emergency Contact.
Zip	Zip number of Emergency Contact.
State	State of Temporary Emergency Contact (In US).
State	State of Temporary Emergency Contact.
Phone	Phone number of Temporary Emergency Contact.
Email	Email of Temporary Emergency Contact.

Table 1-10 Documents Tab Field Definition

Field Name	Description
Doc Type	Type of Document.
Doc No	Document Number.
Issue Place	Place of Issue of Document.
Issue Country	Country of Issue of Document.
Issue Date	Date of Issued of Document.
Exp Date	Expiry Date of Document.
Visa Type	Type of Visa of Document.

Table 1-11 Travel Document Tab Field Definition

Field Name	Description
Document Type	Type of Document.

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Table 1-11 (Cont.) Travel Document Tab Field Definition

Field Name	Description
Document Name	Name of Document .
Document Number	Document Number.
Document Issue Date	Issue Date of Document.
Document Expiry Date	Expiry Date of Document.
Document Issue Country	Document Issue Country.
Document Issue Place	Expiry Date of Document.
First Name	First Name of Passport Holder.
Last Name	Last Name of Passport Holder.
Birthdate	Birth date of Passport Holder.
MRZ1	Machine Readable Track 1 Info.
MRZ2	Machine Readable Track 2 Info.
MRZ3	Machine Readable Track 3 Info.
Number of Entries	Number of Entries of the Passport.
Valid From	Passport Validity Effective Date.
Allow Duration of Stay	Number of Days Allowed To Stay.
Notice and Consent	Mandatory field. Indicates passenger accept and agrees to the Notice and Consent Terms.

Setting Up CIW

This section describes the configurations needed before using the CIW function.

Accessing the Setup Page

The setup function is accessible by launching the **Advance Quick Check In** module and navigating to the **Setup** tab on the main page.

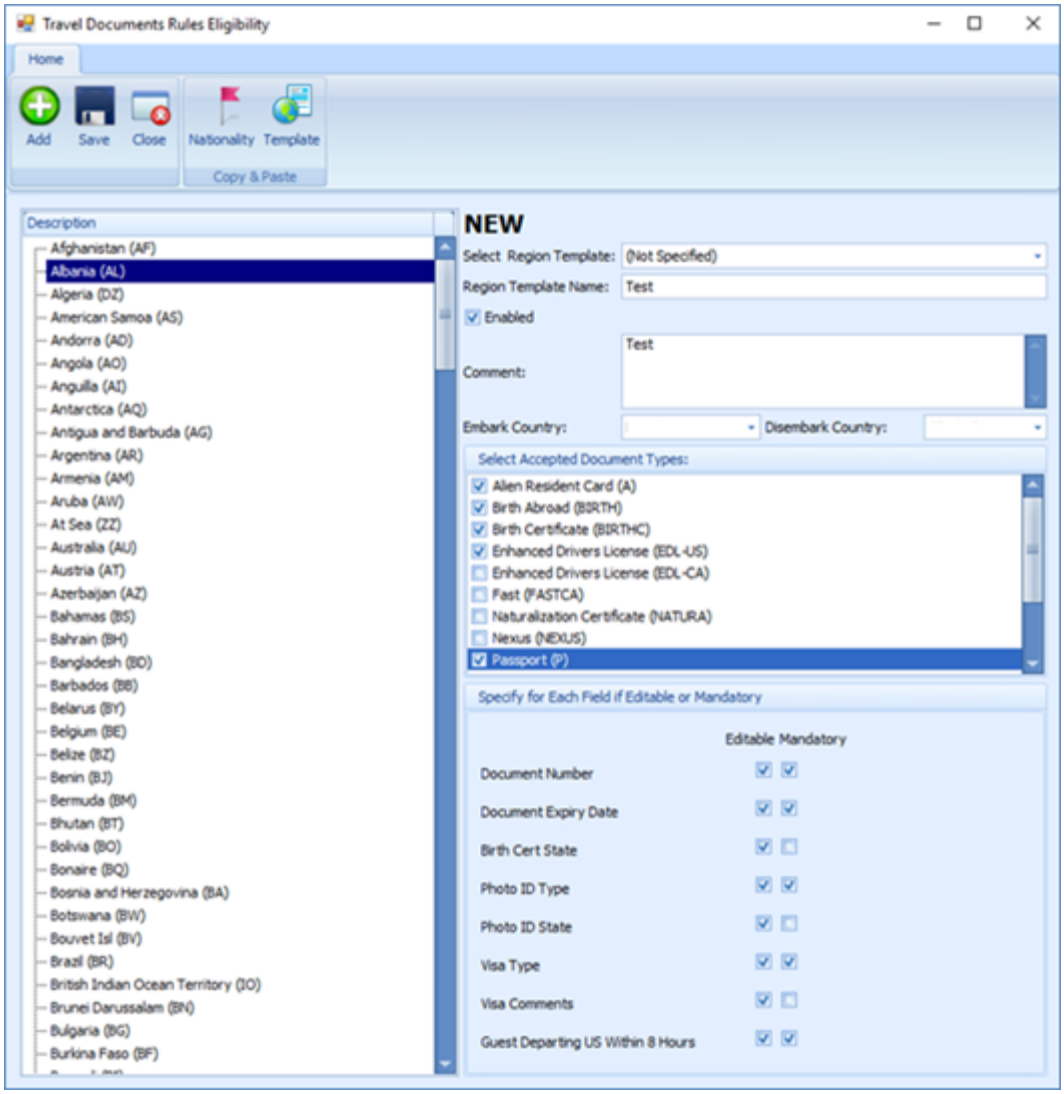
Only users with permission are able access the Setup tab, General Setup, Wizard Travel Rules and Wizard Travel Documents Eligibility assignment.

Setting Up Wizard Travel Rules

Before you begin using the Check-In Wizard (CIW) function, you must configure the travel rules for each nationality, by first creating a template and assigning the nationalities to the template.

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Figure 1-9 CIW Travel Rules



Adding New Travel Document Rules Template

1. At the main page, select the **Setup** tab and the **Wizard Travel Rules** at the ribbon bar to open the rules eligibility screen.
2. By default, all the entry fields are disabled. On the Travel Document Rules Eligibility page, click **Add** or select an existing **Template** to activate the fields.
3. Enter the **Region Template Name** and **Comment**, then select Embark/Disembark Country from the drop-down list.
4. In the **Select Accepted Document Type**, select the applicable checkboxes.

   In the next section, select the applicable checkboxes if the field is **editable** or if **mandatory**, and click **Save** to save the template.
5. Select the **Nationality** and check the appropriate document types accepted under the Select Accepted Document section. The accepted document types are defined in parameter Advance QCI, Wizard DocType xxx.

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6. Select the requirement for document type whether it is editable or mandatory in the Immigration, Visa or other information screen in AQCI.
7. To add more nationality to the rule, repeat steps 6 – 7.
8. Click **Save** to save the template.

Duplicating Nationality Rules

You can duplicate an existing rule defined in a nationality to other nationalities.

1. At the Travel Document Rules Eligibility page, click the **Nationality** button.
2. Select the **Nationality to Copy From** using the drop-down list.
3. Select the **nationalities** on the List of All Nationalities and click the **double right arrow (>>)** to transfer the information to the **Paste to Selected Nationalities** window.
4. To remove the selection, select the **nationality** from Paste to Selected Nationalities, and click the **double left arrow (<<)**.
5. Click **OK** to copy.

Duplicating a Template

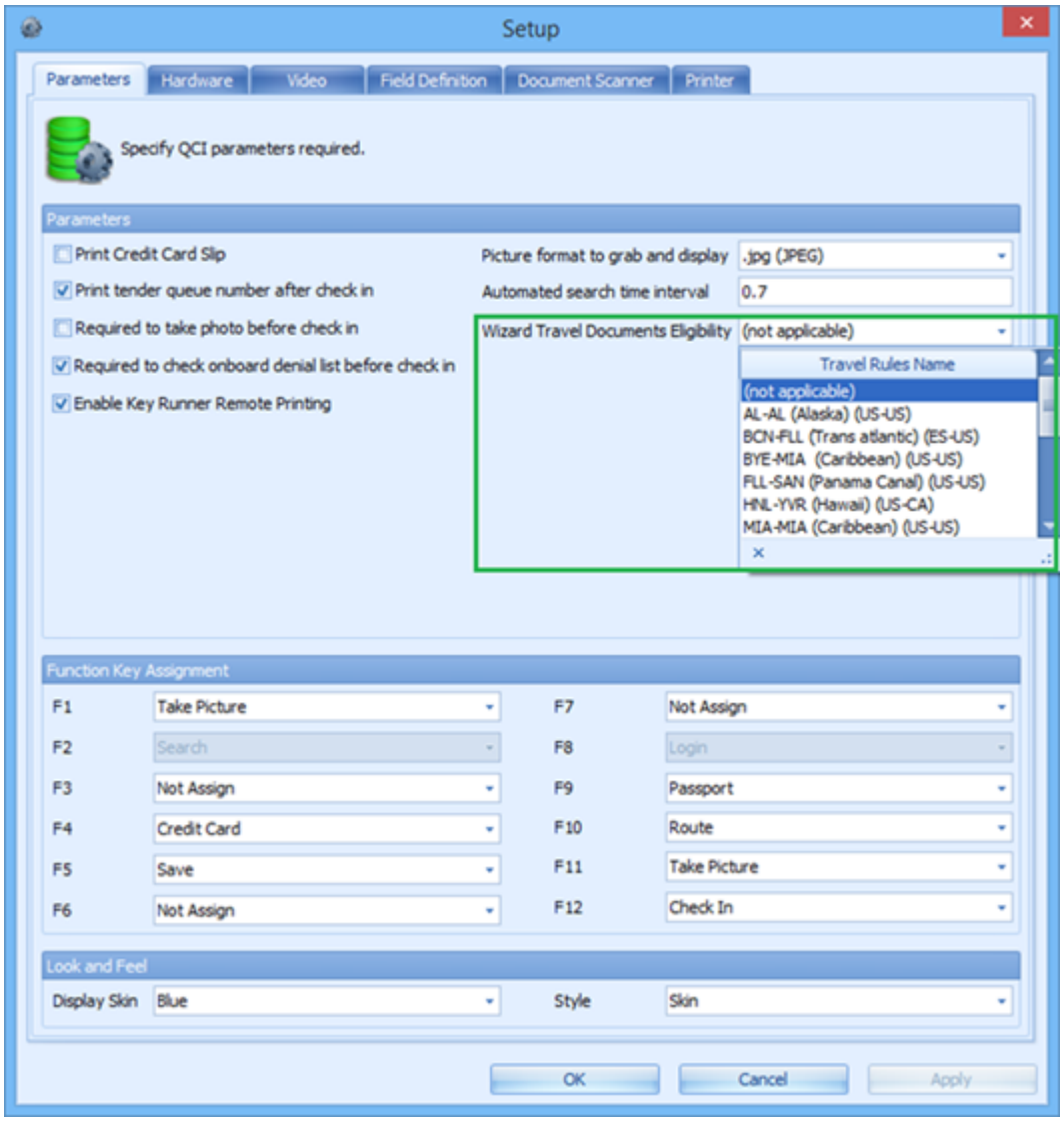
You can copy an existing template if the rules defined are relatively similar.

1. On the Travel Document Rules Eligibility page, select a **Region Template** from the drop-down list.
2. Click the **Template** at the ribbon bar, insert the new template name when prompted and click **OK** to copy.

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Defining Template to a CIW User

Figure 1-10 CIW Travel Documents Eligibility



Once you have the travel rules configured in the template, you can choose the template to use based on the voyage.

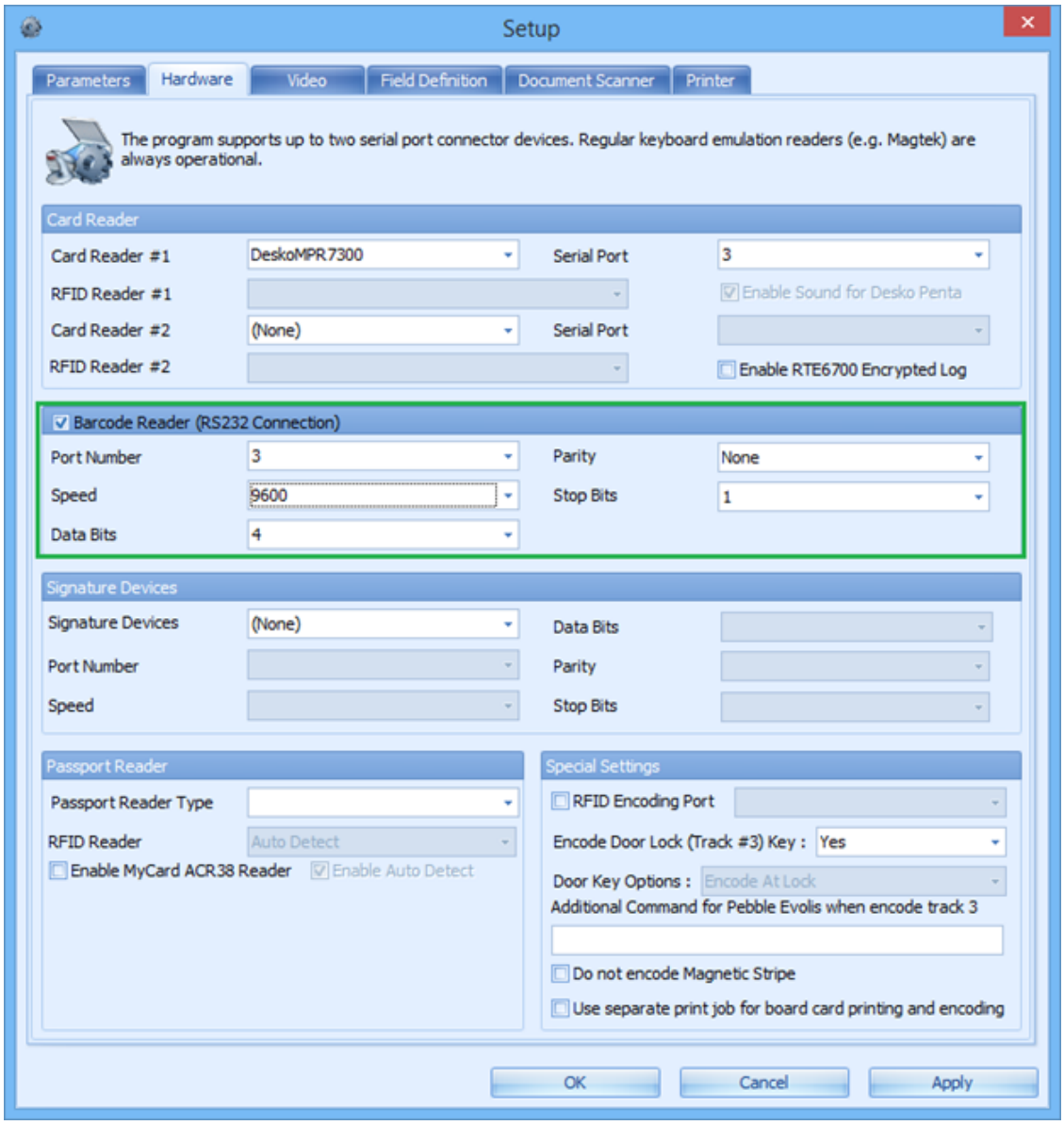
1. At the main AQCI page, navigate to the **Setup** tab.
2. Click the **General Setup** on the ribbon bar.
3. From the Parameters tab, select the **Travel Rules Name under Wizard Travel Documents Eligibility** drop-down list, and click OK to save.
4. The system then updates the selected template in parameter **Advance QCI, Travel Documents Eligibility Setup** and the selected template would be visible.

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Setting up the Barcode Scanner

The CIW supports barcode scanning of the passenger's board card, and the field used to search the passenger's record is defined in the parameter, Advance QCI, Wizard - Scan Barcode field. Typically, the search uses the reservation board card external number to identify the passenger as the external number is usually printed on a document, such as set-sail pass.

Figure 1-11 CIW Hardware Tab



1. At the main AQCI page, navigate to the **Setup** tab and click the **General Setup** at the ribbon bar.
2. At the **Hardware** tab, select the **Barcode Reader (RS232 Connection)** checkbox, set the speed to **9600**, and use the system defaulted port number, parity, stop bits and data bits setting. The supported barcode format is Interleaved2of5, Code 39 and Barcode C128, minimum speed at 9600.

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3. Click **OK** to save.

Setting up the Passport Reader

The CIW function supports a number of passport readers that are used for registration. To configure the passport reader,

1. Repeat step 1 of Setting up the Barcode scanner.
2. At the **Hardware** tab, select the **Card Reader** for a swipe type reader or select **Passport Reader** for a scanner type reader from the drop-down list and use the system default settings.
3. Click **OK** to save.

Check-In Wizard Functions

The Check-In Wizard (CIW) function facilitates a quick and effective check-in and record passenger's information at the same time.

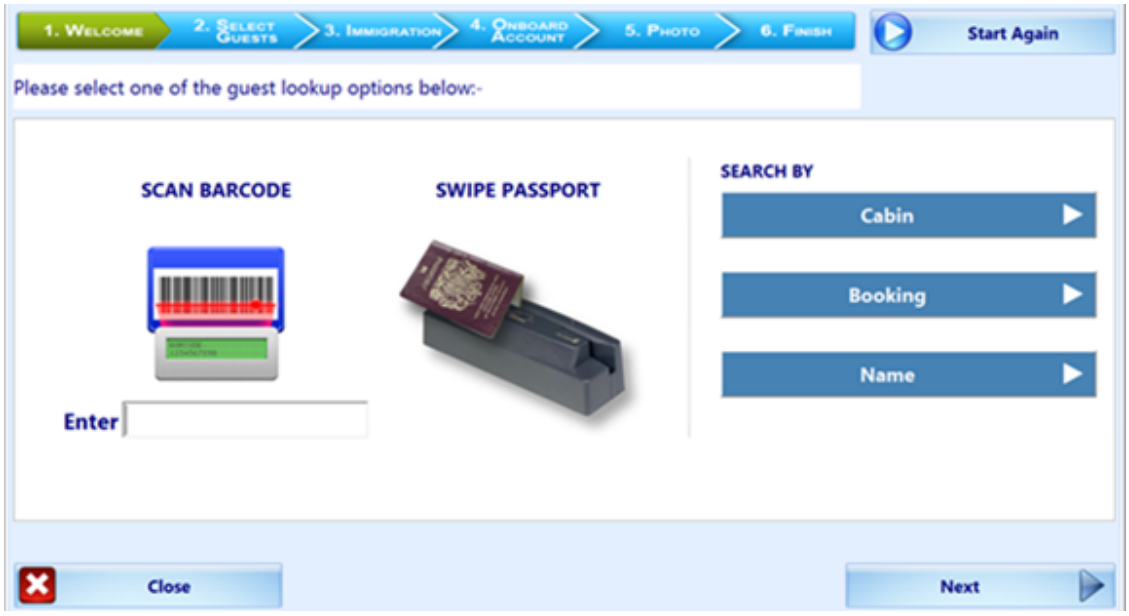
The presentation of the screen may vary depending on the parameter defined in **Advance QCI, Wizard - Show Upon Startup**.

Check In Guest with CIW

The CIW is a check in process comprised of six screens.

Welcome Screen

Figure 1-12 Check In Wizard



The Welcome Screen is the first of six processes in the CIW. It provides you a guest information look-up by scanning a barcode, swiping or scanning a passport through a passport reader or search by cabin, and booking number or name.

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Search Guest Using Scan Barcode

Scan the document barcode with the barcode scanner or manually enter the external code in the field below the scan barcode image, and then click **Enter**.

The passenger's information appears in process **2. Select Guests**. In the event the external number is not found, then a warning message "Guests not found. Please try again" appears.

Search Guest Using Swipe Passport

Swipe the passport through the passport reader. The passenger's information appears in process **2. Select Guests**. In the event the passport number is not found, a warning message "Guests not found. Please try again" appears.

Search Guest Using Cabin, Booking Number or Name

1. At the Welcome Screen, click the **Cabin, Booking** or **Name** icon, and enter the corresponding information into the respective field.
2. Click **Next**. The passenger's information appears in process **2. Select Guests**. In the event the passport number is not found, a warning message "Guests not found. Please try again" appears.

Selecting a Guest

The Select Guests screen is the second of six processes in CIW. It displays the earlier searched guests that are due to embark. The following section describes the usage within the Select Guests screen.

Figure 1-13 CIW — Select Guests

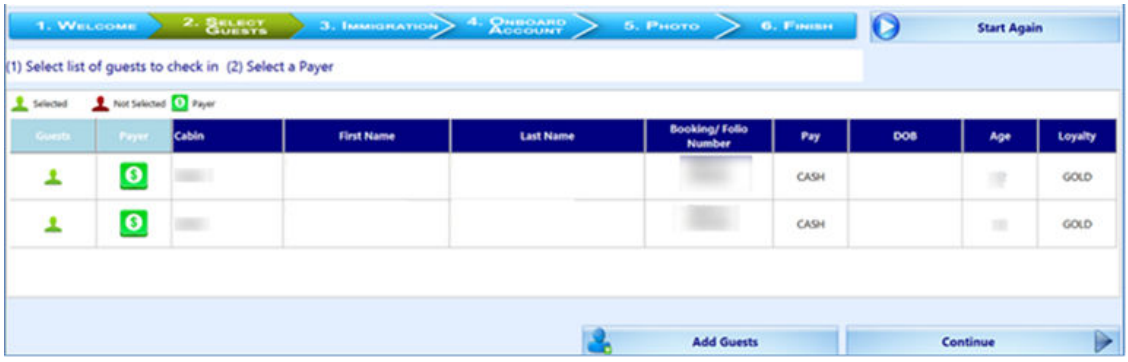


Table 1-12 Select Guests Screen Field Definition

Field Name	Descriptions
Guest	Indicates whether the guest account is selected or not, and by default it is shown as Selected.
Payer	Indicates whether the guest is a payer for the account.
Cabin	Displays the cabin number assigned.
First Name	First Name of the guest.

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Table 1-12 (Cont.) Select Guests Screen Field Definition

Field Name	Descriptions
Last Name	Last Name of the guest.
Booking/Folio Number	Displays the guest booking number and is defaulted to RES_BOARDCC_EXT field. The guest folio number is the user defined field, for example RES_ACC.
Pay	Displays the payment method use.
DOB	Displays the guest date of birth.
Age	Displays the age of the guest.
Loyalty	Displays the discount category entitled during the cruise.

Selecting a Guest to Select/Deselect a guest account

To select/deselect the guest, click the icon in the **Guest** column. Multiple selection is permissible when selecting guests to check in.

Adding Guest to Check-In

You can add guests to the selection list using the **Add Guest** function. Upon clicking **Add Guest**, the system returns to the **Welcome** screen, enabling you to add a guest to the list by repeating the earlier process.

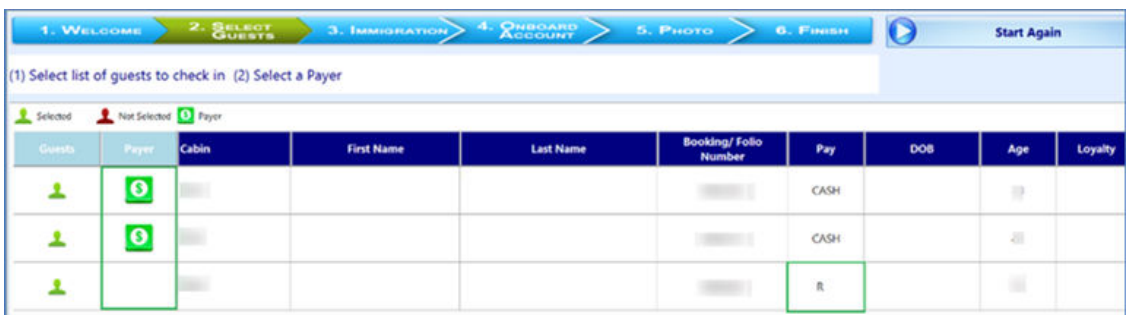
Selecting/Deselecting a Payer

- To deselect a payer from the guest account, click the **Dollar** symbol under Payer column. This removes the symbol from the column.
- To select a payer for the account, click the **blank space** in the Payer column to turn on the Dollar symbol.

If the account has routing instructions, the payer account will display the Dollar symbol under Payer column, the guest he/she is paying for will be blank in the Payer column and the letter R appears in Pay column.

The system always process the first payer on the grid, and the next payer when more than one payer account is selected before it continuing the non-payer account.

Figure 1-14 Payer Routing Selection



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Promotion Eligibility

For guest entitled to a promotion, you are prompted with a Promotion Eligibility Notice requesting Authorization from the user.

For sign-on user assigned with user security rights *#4510 – Allow Authorize RCL Check-In Hard Stop*, you can immediately authorize/reject the eligibility.

For sign-on user that does not have the above user security right, further authorization from a supervisor level is needed.

Figure 1-15 Promotion Eligibility Notice



Guest Messages

The system prompts the following when there is a message waiting to be delivered to the guest. The Message Notice prompt is set off in **Guest Message Delivery mode, 1 – Deliver at Advance ACI Wizard**.

- For guest that has undeliverables messages, a **Message Notice** shall appear, requesting an authorization to mark the message as delivered.
- For user assigned with user security right *#4510 – Allow Authorize RCL Check-In Hard Stop*, you can immediately authorize or reject delivery of the message.
- If you are a regular user, further authorization from a supervisor level is needed.

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Figure 1-16 Guest Message Notification



- If the system prompt a warning notice that prevents the guest from embarking, then check-in is prohibited.

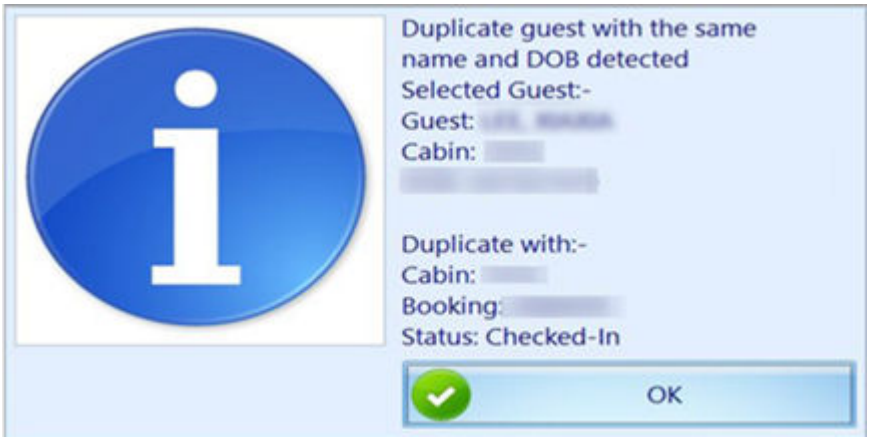
Figure 1-17 Guest Message Warning Prompt



Checking In Selected Guest

Once you select a guest and you click **Continue**, the system automatically navigates to the next process, which is the **Immigration Screen**. If the system found the booking to be a duplicate, check-in is not allowed until the duplicate booking is resolved.

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Check-In Multiple Guest

To check-in multiple selected guests,

1. Select the guests to check in.
2. Click **Continue** and the system automatically navigate to the next process, which is the **Immigration Screen**.

Edit/View a Check-In Guest

Viewing/editing the guest account or printing a Set Sail pass after the guest checks-in is possible with the Check-In Wizard, available in the **Select Guests** screen

To edit/view guest account

1. Repeat the steps in **Welcome Screen**. On **Select Guests** screen, guest that has checked-in are highlighted in green.
2. Click the **Booking/#Folio** field to edit or view the account.
3. Select one of the following options when prompted.
   - **View:** Does not permit you to change any of the guest details.
   - **Edit:** You are allowed to edit the guest details, and save the changes in a later process.
   - **Print:** This function prints the Set Sail pass to the report printer assigned in **General Setup, Hardware**.
4. If you select **View**, you are not allowed to change guest details. If you select **Edit**, the system automatically navigates to the Immigration screen where editable fields are enabled.
5. Update the guest details, and click **Next** to update the **Visa requirements**, if any.
6. Continue to click **Next** until reaching the process 5. Photo screen.
7. Click **Save**.

Edit/View a Check-In Guest Payment

To edit/view a checked-in guest payment method:

1. Repeat the process from the **Welcome Screen**. The guests that have been checked-in are highlighted in green on the **Select Guests** screen.

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2. Click the **Payment Type** in the **Pay** column to edit or view the account. The system automatically navigate to the process 4. Onboard Account screen.
3. Click the **Credit Card, Cash** or **None** image to change the payment type.
4. Click **Save** to save the changes. You can add or remove a routing assignment in this section. See Routing Assignment for steps on how to add/remove a routing.

Immigration

The **Immigration** screen is the third of six processes in CIW and has two sections; one that captures guest details and a **Visa** screen that stores the travel visa information. Typically, this information is uploaded during data import, and can manipulate certain data based on the travel rules defined in Travel Rules Setup.

Before you can check in a subsequent guest, you must first complete the **Immigration** information and **Onboard Account** of the first guest. The system repeats this process until the last guest is updated and then lets you move to the next process, which is **Photo**.

Table 1-13 Immigration Screen Field Definition

Field Name	Descriptions
First Name, Middle Name, Last Name	First and Last Name of the guest. The fields are non-editable. Information auto-populates fields when the travel document is swiped. • If the logged-in user is a supervisor (#4510), the individual can edit the first and last names on the immigration screen. • If logged-in user is not a supervisor, then the first and last name fields are not editable. Edit button allows for a supervisor to swipe credentials through the card reader and make the first/last name fields editable.
Chinese First Name, Last Name	Chinese First and Last Name of the guest. These fields are editable and mandatory when they match the nationality defined in the **Advance QCI - Wizard - Nationalities With Chinese Names** parameter. Travel document information auto-populates when scanned with the 3M passport scanner.
Nationality	Information populates during passport swipe. The field is non-editable unless you click **Manual** which enables the drop-down selection list.
Document Type	Information populates during passport swipe. The options on the drop-down list are based on the selected nationality and conditions defined in Travel Rules Setup.
Document Number	Information populates during passport swipe. The field is editable or mandatory depending on the conditions defined in Travel Rules Setup.
Date of Birth	Information populates during passport swipe. The field is non-editable unless you click the **Manual** button next to Nationality.
Expiry Date	Information populates during passport swipe. The field is editable or mandatory depending on the conditions defined in Travel Rules Setup.

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Table 1-13 (Cont.) Immigration Screen Field Definition

Field Name	Descriptions
Birth Cert state	Information populates during passport swipe. The field is editable or mandatory depending on the conditions defined in Travel Rules Setup. For US Citizens, select the US States from the drop-down list.
Gender	Information populates during passport swipe. The field is editable or mandatory depending on the conditions defined in Travel Rules Setup.
Photo ID Type	Field is editable or mandatory depending on the conditions defined in Travel Rules Setup.
Photo ID State	Field is editable or mandatory depending on the conditions defined in Travel Rules Setup.
Country of Birth	This is a mandatory field.
Country of Residence	This is a mandatory field.
Emergency Contact Name	This is a free text field.
Emergency Phone	This is a mandatory field, and the minimum number is seven digits. Sequential and repeating numbers are not acceptable.
Copy to All	This function copies input numbers to other guests if you select Multiple Guest.
Ship Email.	This field is enabled when the **Advance QCI, Wizard Show Ship Email Address** parameter is active. You must have access rights 4689 – Allow to Change Email address.
Exclude From Quick Billing Printing	This field is enabled when the **Advance QCI, Wizard Show Quick Billing Printing Option** parameter is active. You must have access rights 4688 – Allow to Change Quick Billing Printing Option.
National ID	National ID number of contact person.
FIN Number	Foreign Identification Number.
Notice and Consent	Mandatory field. Indicates that passenger accepts the Notice and Consent terms.

Some of these fields are mandatory and validate when you click **Next**. The examples are as follows:

Date of Birth

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Figure 1-18 Year Setting Affecting Travel Documents



- If the PC Regional Setting year is set to a 2-digit year format, the system prompts for confirmation of the correct year. Select the correct year to update.

Figure 1-19 Year Setting Affecting Guest Age



- If a changed date is within the minor age group or vice versa, you will receive another prompt requesting for the SeaPass Card to be reprinted.

Expiry Date

- Similar to Date of Birth, the system validates the expiry year based on the PC Regional Settings.
- If the selected document type is a Passport, the system validates the expiry date based on the following parameters in **Advance QCI**:
  - Passport Expiry Validation.
  - Passport Expiry Validation Disembark Date In Day.

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- Passport Expiry Validation Disembark Date In Month.
- Passport Expiry Validation Hard Stop.
- Passport Expiry Validation In Day.
- Passport Expiry Validation In Month.

Emergency Phone

Repeating numbers or numbers in sequential order is not accepted as Emergency Phone number, for example 12345678 or 1111111.

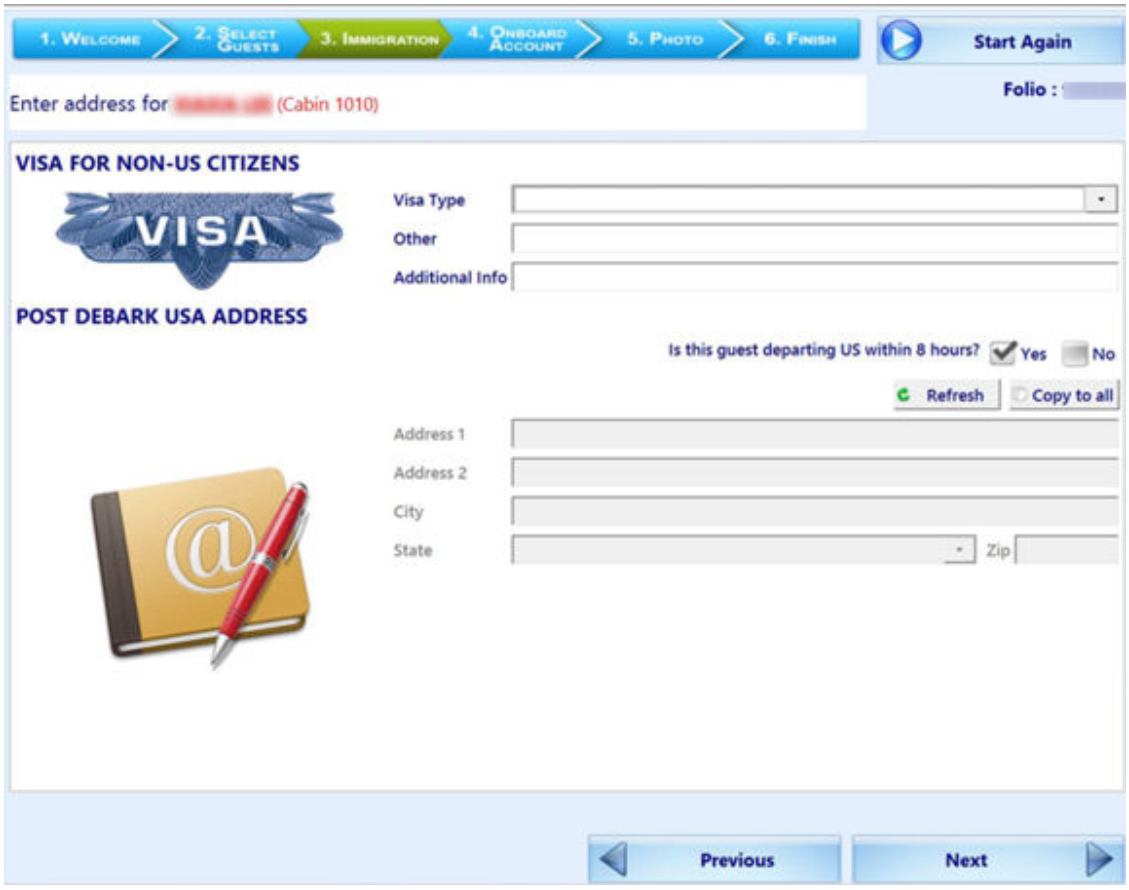
Notice and Consent

The system prompts a warning message if this checkbox is deselected and prevents you from continuing. Click **OK** to return to the previous screen.

Adding Visa Information

On the **Visa** section, the required Visa Type is dependent on the Travel Rules Setup.

Figure 1-20 Visa Requirements



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Table 1-14 Visa Screen Field Definition

Field Name	Descriptions
Visa Type	Field is editable or mandatory depending on the conditions defined in Travel Rules Setup.
Other	Free text field.
Additional Information	Free text field.
Is this guest departing US within 8 hours?: Yes/ No	Field is editable or mandatory depending on the conditions defined in Travel Rules Setup. By default, Yes is selected.
Refresh	Button resets the screen to default selection.
Copy to All	This function copies input numbers to other guests if you select Multiple Guest.
Address 1 / 2, City, State and Zip	Field editable if you select **NO** to the question “Is this guest departing US within 8 hours?”. Zip code must not be less than five digits.

Entering Visa Information

1. Select the type of visa from the drop-down list.
2. Use the **Other** field to enter the Visa Number and the **Additional Info** field for other information.

Entering Post Debark US Address

1. Select **No** on the question “Is this guest departing US within 8 hours?”.
2. Fill in the US Address, City, State and Zip code.
3. Click **Next** to continue.

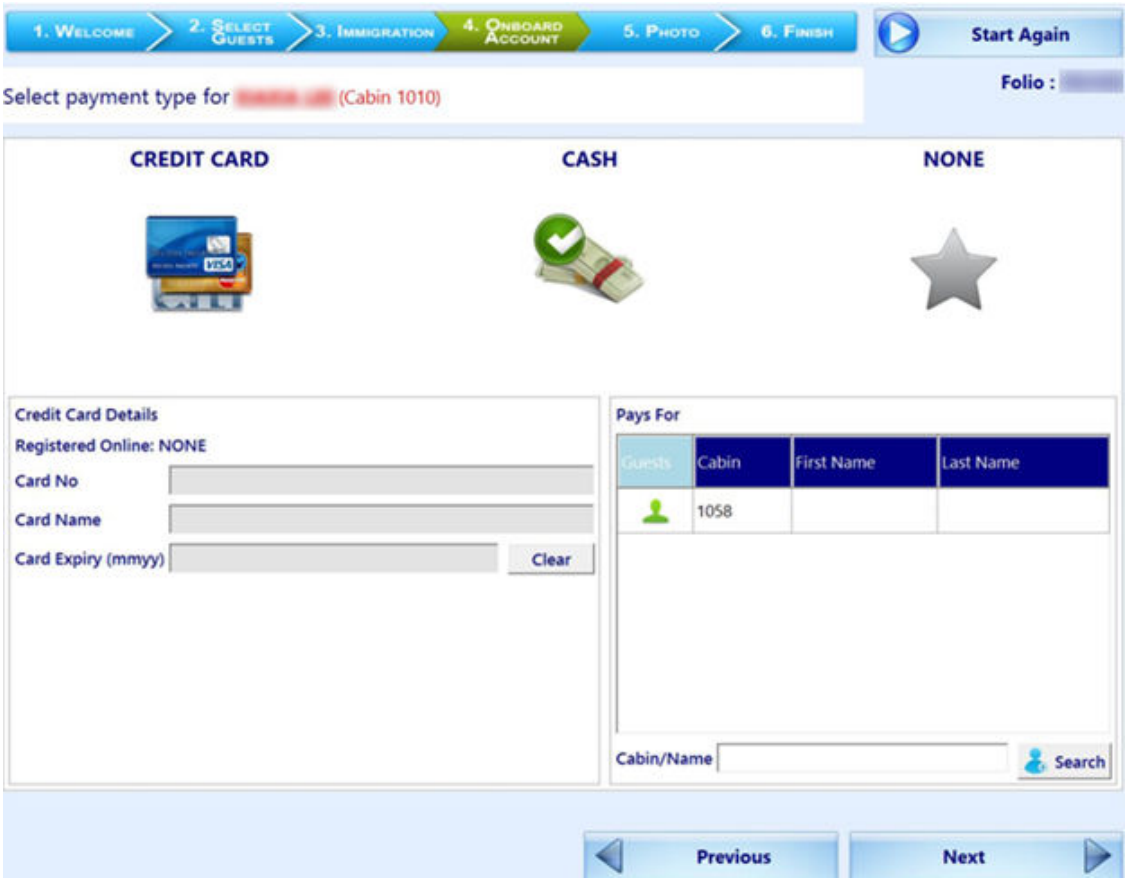
Onboard Account

The **Onboard Account** screen is the fourth of six processes in CIW, and it stores the guest payment type, with the selected payment type indicated by a green check mark on the icon.

- Click the appropriate image to select a payment type. Options are: Credit Card, Cash, and None.
- If the guest has a registered credit card, the card details appear in the card section with its credit card number masked.
- It also allows you to route an account to the guest.

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Figure 1-21 Onboard Account



Updating the Credit Card Details

To update or swipe the card for details,

1. Select the **Credit Card image**.
2. Swipe the credit card through the reader or manually enter the credit card number, name, and expiry date.
3. Click **Clear** to reset the information entered.
4. If the card name or credit card number registered online differ from the card, the system prompts a **Change Notice**.

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Figure 1-22 Credit Card Change Notice



5. Click **Yes** to overwrite existing information with new or **No** to retain the information and disable the previously registered credit card. If the credit card is registered twice, you are prompted with the message: **"This credit card is already registered in the system. Please use another credit card"**.

> **Note**
>
> For the above validation, it requires the **'General','Check Credit Card Registration'=1** parameter.

Dynamic Currency Conversion (DCC) Handling

The Check-In Wizard supports Dynamic Currency Conversion (DCC) as part of the credit card payment type. When the guest uses a foreign based credit card, the guest has an option to choose whether to use the home base currency or dynamic currencies during settlement.

This handling requires the following parameters: *'General', 'Enable Credit Card DCC'=1* and *'General', 'DCC Base Country'=NULL*, and default the *'DCC Enabled' to Yes*.

To opt in a settlement using Dynamic Currency Conversion:

1. Select the **Credit Card image**.
2. Swipe the credit card through the card reader or manually enter the credit card number, name, and expiry date, and click **Next**.

By default, the Ship currency is checked. Select a **Currency Type** when prompt, and click **OK** to save.

Selecting Other Payment Type

For payment type that is Cash,

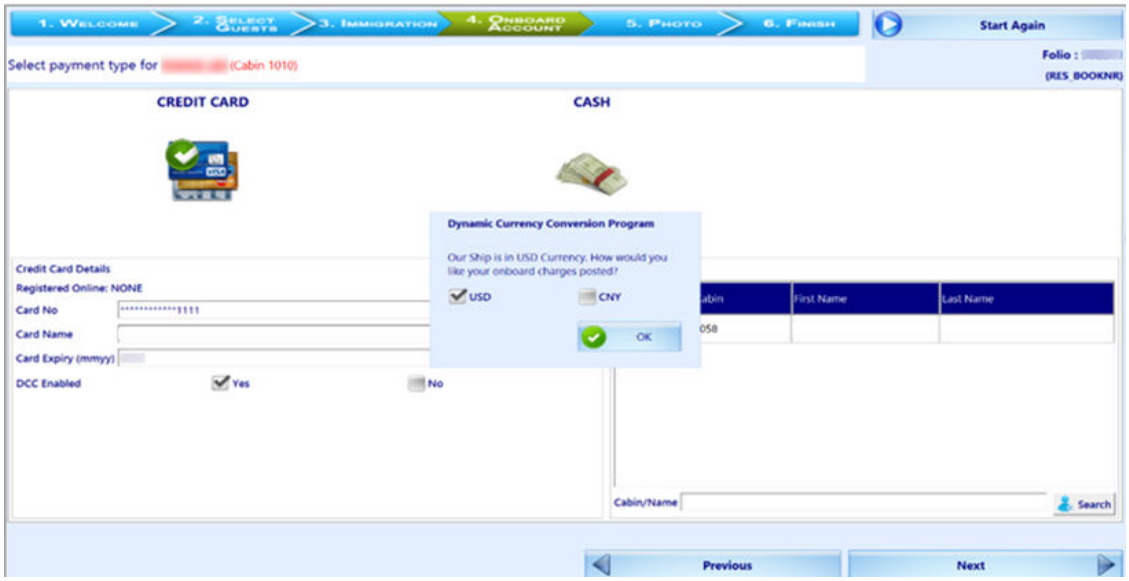
1. Select the **Cash image**.
2. Click **Save** to save the changes.

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If no payment type is specified, do the following:

1. Select the **None** image. This will prompt, “You have selected NONE as payment method, do you want to continue?”.
2. Click **Yes** to proceed to the next step, or click **No** to return the current screen.

Figure 1-23 DCC Handling



Routing Assignment

The Routing function is **enabled** when the selected guest is the payer.

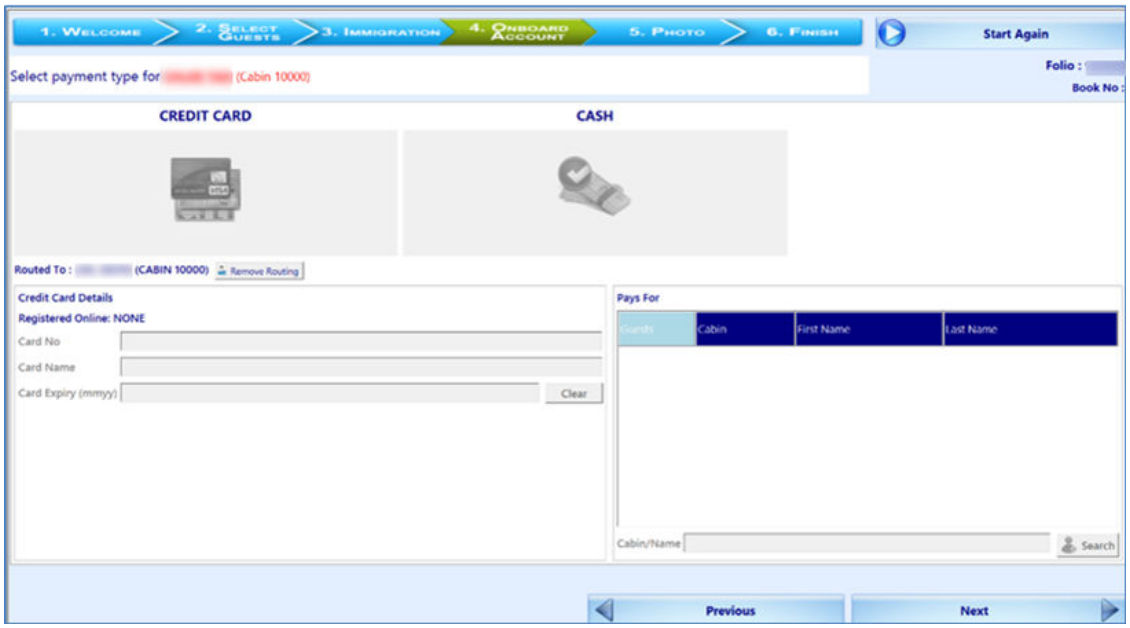
To route an account to current guest:

1. In the **Onboard Account** screen **Pays for** section, search the buyer’s last name or cabin number.
2. At the searched list, click the **Guest** column to select the account. This action changes the color from red to green.
3. Click **Save** to save the routing.

If more than one guest is selected in **Select Guests** screen, the system returns to the **Immigration** screen automatically, allowing you to complete the next guest information and payment option.

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Figure 1-24 Onboard Account Routing



Photo

The **Photo** screen is the fifth of six processes in Check In Wizard (CIW). It stores a copy of the guest photo captured with the live camera attached to the PC. This function requires the *'Quick Check In', 'Take Photo Before Checkin'=1* parameter.

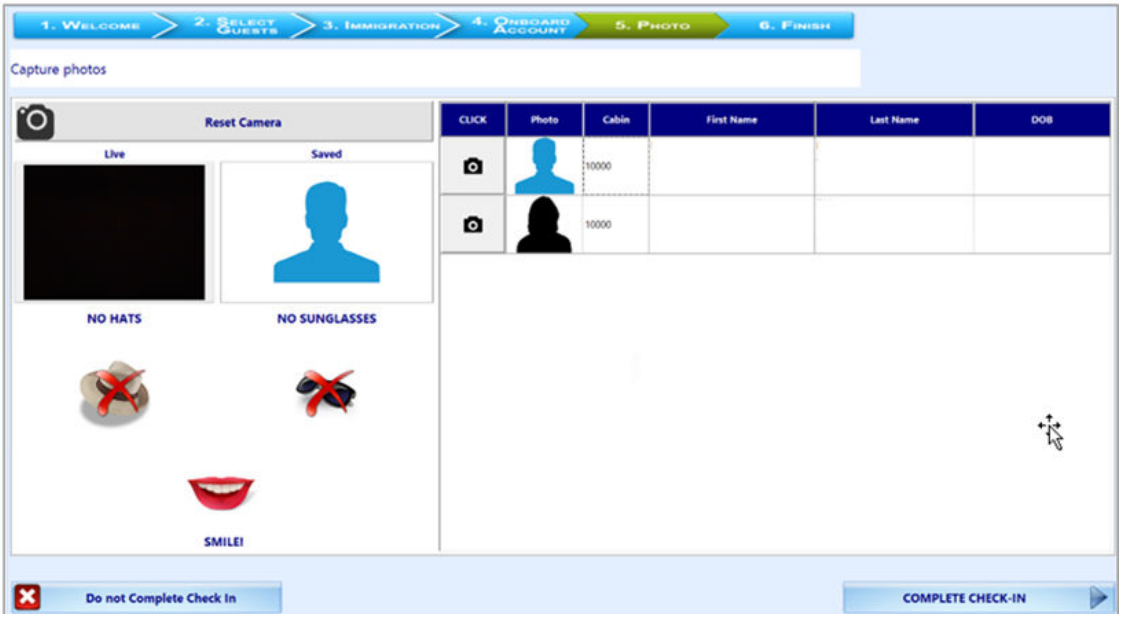
With the above parameter, taking a picture is mandatory before you can proceed to the next step when a camera is detected to be working. You will be prompt with the message: **"Guest photo must be taken before you can continue'"**. If no camera is detected, or if the camera is not working, then photo taking is not required.

Saving Live Photo to Guest Account

1. At the guest list, click the **Camera** icon under the **Click** column of the guest you wish to capture in the photo. The photo taken appears in the **Saved** column.
2. To retake the picture, repeat step 1.
3. If the camera becomes non-responsive, click the **Reset Camera**.
4. Click **Complete Check-In** to save the photo and advance to the **Finish** screen, which lists all successfully checked-in guests.

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Figure 1-25 Photo Screen



Start Again

Start Again allows you to reset the earlier selection and return to the **Welcome** screen without checking in the guest.

User Security Group

This section describes the user security access group that enables you to access the Check In Wizard (CIW). The security privilege is assigned through the **User Security** module.

Table 1-15 AQCI User Access Rights

Security Reference No	Description
4510	Allow Authorize RCL Check-In Hard Stop.
4681	Travel Rules Eligibility
4688	Allow to Change Quick Billing Printing Option.
4689	Allow to Change Email address.

Parameters

This section describes the Parameters available to the Advance Quick Check-In Module (AQCI) and Check In Wizard (CIW). They are accessible from the **Administration** module under **System Setup, Parameter**.

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Table 1-16 PAR Group — AQCI

PAR Name	PAR Value	Description
Wizard DocType Alien Resident Card	Value from Document Types	Internal mapping for document type Alien Resident Card in TYP_VIT
Wizard DocType Birth Abroad		Internal mapping for document type Birth Abroad in TYP_VIT
Wizard DocType Birth Certificate		Internal mapping for document type Birth Certificate in TYP_VIT
Wizard DocType Enhanced Drivers License CA		Internal mapping for document type CA enhanced driver's license in TYP_VIT
Wizard DocType Enhanced Drivers License US		Internal mapping for document type US enhanced driver's license in TYP_VIT
Wizard DocType Fast		Internal mapping for document type Fast in TYP_VIT
Wizard DocType Naturalization Certificate		Internal mapping for document type Naturalization Certificate in TYP_VIT
Wizard DocType Nexus		Internal mapping for document type Nexus in TYP_VIT
Wizard DocType Passport		Internal mapping for document type Passport in TYP_VIT
Wizard DocType Passport Card		Internal mapping for document type Passport Card in TYP_VIT
Wizard DocType Sentri		Internal mapping for document type Sentri in TYP_VIT
Wizard DocType US Re-entry Card		Internal mapping for document type US Re-entry card in TYP_VIT
Wizard DocType US Refuge Card		Internal mapping for document type US Refuge card in TYP_VIT
Wizard - Show Upon Startup	0,1 or 2	Define the main screen to launch upon start up. 0 = Main AQCI screen without Check-In Wizard function. 1 = Check In Wizard. 2 = Main AQCI screen with Check-In Wizard function.
Wizard - User Defined Text for Scan Barcode	Example: Scan Barcode	The user define button label for Scan Barcode.
Wizard - No. of seconds to buffer Next button	User Define	Define the number of seconds before the **Next** button appears.
Wizard - Scan Barcode Field	res_boardcc_ext	Define the column name to search when a barcode is scanned.

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Table 1-16 (Cont.) PAR Group — AQCI

PAR Name	PAR Value	Description
Wizard - Nationalities With Chinese Names	Example: CN, TW	Compulsory Chinese names for nationalities as specified in TYP_NAT.
Wizard Show Ship Email Address	0 or 1	Define whether to show Ship Email on Wizard form 0 = Do not show in wizard form. 1 = Show in wizard form.
Wizard Show Quick Billing Printing Option	0 or 1	Define whether to show Quick Billing Printing Option on Wizard form 0 = Do not show in wizard form. 1 = Show in wizard form.
Travel Documents Eligibility Setup	0 or 1	Displays the list of eligible travel documents based on the Travel Rules Setup in AQCI.
Passport Expiry Validation	0, 1, 2, 3 or 4	Define whether passport expiry validation is required. 0 = Do not validate 1 = Validate with the par value specified in month. 2 = Validate with the par value specified in day. 3 = Validate against disembark date with the par value specified in month. 4 = Validate against disembark date with the par value specified in day.
Passport Expiry Validation Disembark Date In Day	0, >0	Define whether passport expiry validation is required. 0 = Do not validate passport expiry. >0 = Validate passport expiry date against disembark date with the par value specified in day.
Passport Expiry Validation Disembark Date In Month	0, >0	Define whether passport expiry validation is required. 0 = Do not validate passport expiry. >0 = Validate passport expiry date against disembark date with the par value specified in month.
Passport Expiry Validation Hard Stop	0 or1	Define whether passport expiry validation is required. 0= Disable Hard Stop Validation. 1 = Enable Hard Stop Validation.

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Table 1-16 (Cont.) PAR Group — AQCI

PAR Name	PAR Value	Description
Passport Expiry Validation In Day	0, >0	Define whether passport expiry validation is required. 0 = Do not validate passport expiry. >0 = Validate passport expiry date with the par value specified in day.
Passport Expiry Validation In Month	0, >0	Define whether passport expiry validation is required. 0 = Do not validate passport expiry >0 =Validate passport expiry date with the par value specified in month.
Overwrite Passport Details	0 or 1	Define if passport details can be overwritten. 0 = Do not allow overwrite passport details when guest name does not match with the passport guest name message prompted and 'No' answer is chosen. 1 = Allow to overwrite details.
Key Runner Remote Printing	0 or 1	Define Key Runner Remote Printing. 0 = Do not print Key Runner Remote Printing. 1 = Print Key Runner Remote Printing.
Auto Print Key Runner Receipt	0 or 1	Define Auto Print Key Runner Receipt. 0 = Do Not Auto Print Key Runner Receipt. 1 = Auto Print Key Runner Receipt.
Auto Print Key Runner Receipt when scan barcode Extend Search Criteria = RES_BOOKNR		Define Auto Print Key Runner Receipt when scan barcode Extend Search Criteria = RES_BOOKNR

Table 1-17 PAR Group — Quick Check In

PAR Name	PAR Value	Description
Take Photo Before CheckIn	0 or 1	Define whether photo is required before completing the check-in. 0 = Not required. 1 = Required.

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Table 1-17 (Cont.) PAR Group — Quick Check In

PAR Name	PAR Value	Description
None Payment Department ID	Example: 9910	Define the **DEP_ID** for None Payment type use Wizard Screen.
Gender Changed Msg If Swiped	0 or 1	Define whether to display or not to display the message when gender value changed during passport swipe.

Table 1-18 PAR Group - General

PAR Name	PAR Value	Description
Check Credit Card Registration	0 or 1	Define whether to check if same credit card is registered twice. 0 = Do not check. 1 = Check card registration.
Enable Credit Card DCC	0 or 1	Option to use Dynamic Currency Conversion 0 = Disable. 1 = Enable.
DCC Base Country		Specify the Credit Card DCC (Dynamic Currency Conversion) Base Country, for example US.
Adult Min Age	Example: 18	Define the minimum age of an adult.

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2

Quick Check-in Synchronization

The Quick Check-In Synchronization (QCI Sync) is an interface that connects the Quick Check-In stations to the Shore-side database server through a separate network, enabling users to continue to work in an off-line mode.

Prerequisites, Supported Systems, Oracle Database, and Compatibility

This section describes the minimum requirements for Quick Check In Synchronization application.

Prerequisites, Supported Systems, Oracle Database, and Compatibility

QCI Shore Database Server

- Oracle Database Server Installation
- OHC Web Service Installation

> **Note**
>
> You may install the QCI Shore Database Server on the supported Oracle Linux OS. However, OHC Web Service is a SOAP Web Service that can only be installed on a Microsoft Windows OS. Under this circumstance, you can opt to install the OHC Web Service on the supported Microsoft Windows Desktop OS listed in our compatibility matrix.
>
> Although the OHC Web Service can be installed on a Windows Desktop OS, Windows Server OS is the preferred if one can be provisioned.

- OHC SPMS Version 23.3 Installation
- Latest version of OHC Advanced Quick Check In

PC running QCI Sync Interface

- Oracle Client Installation
- OHC SPMS Version 23.3 Installation
- Latest version of QCI Sync Interface

PC running OHC Advanced Quick Check In at Shore-Side

- Oracle Client Installation
- OHC SPMS Version 23.3 Installation
- Latest version of OHC Advanced Quick Check In

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Supported Operating System and Oracle Database

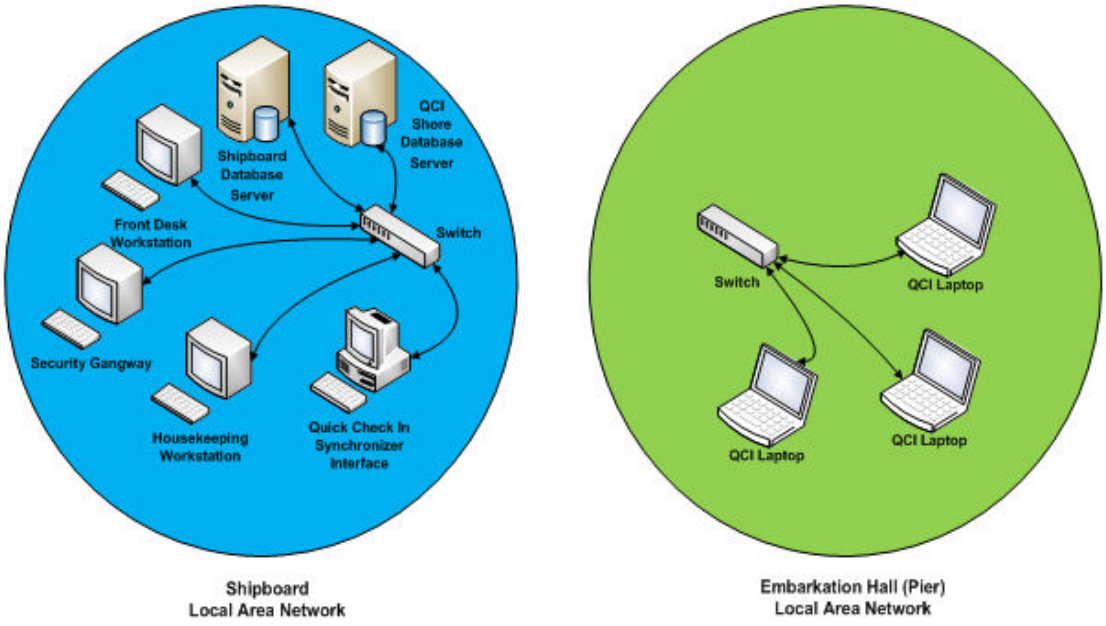
- See Compatibility Matrix at http://docs.oracle.com/en/industries/hospitality/.

Technical Workflow

The Quick Check In (QCI) Sync Interface enables pier-side stations to continue working in an off-line mode, yet the data is updated in real-time. This is accomplished by connecting the Quick Check-In stations to a shore-side database server that resides on a separate network within the Embarkation Hall. The external network remains linked to the shipboard environment, allowing data synchronization between the shipboard database and the shore-side database through an interface. If there is a loss of connectivity, transactions are temporary held and written to the shore-side database server when the connectivity resumes, and synchronizes the changed transactions between both the shipboard and shore-side environments.

Before the ship embark at the pier, the person in charge onboard the ship will start up and connects the QCI Shore database server to the shipboard network. The QCI Sync Interface then performs the backup and restores database activities as illustrated in the diagram below.

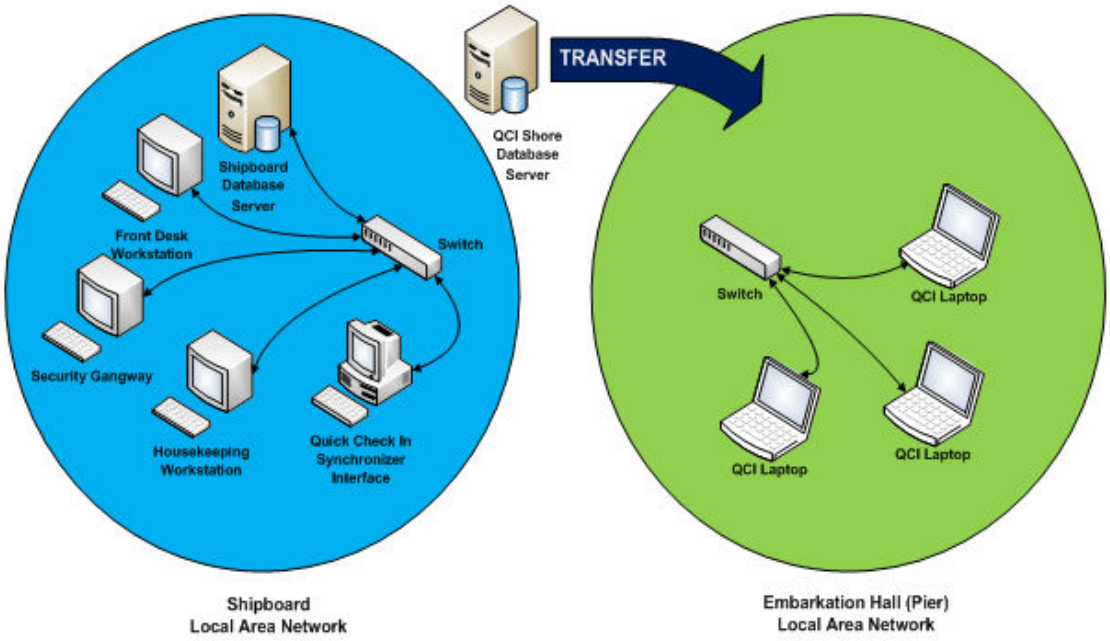
Figure 2-1 QCI Sync Interface Data Flow



After the backup and restore database activities completes, you must shutdown the QCI Shore database server in a proper manner before relocating it to the pier Embarkation Hall.

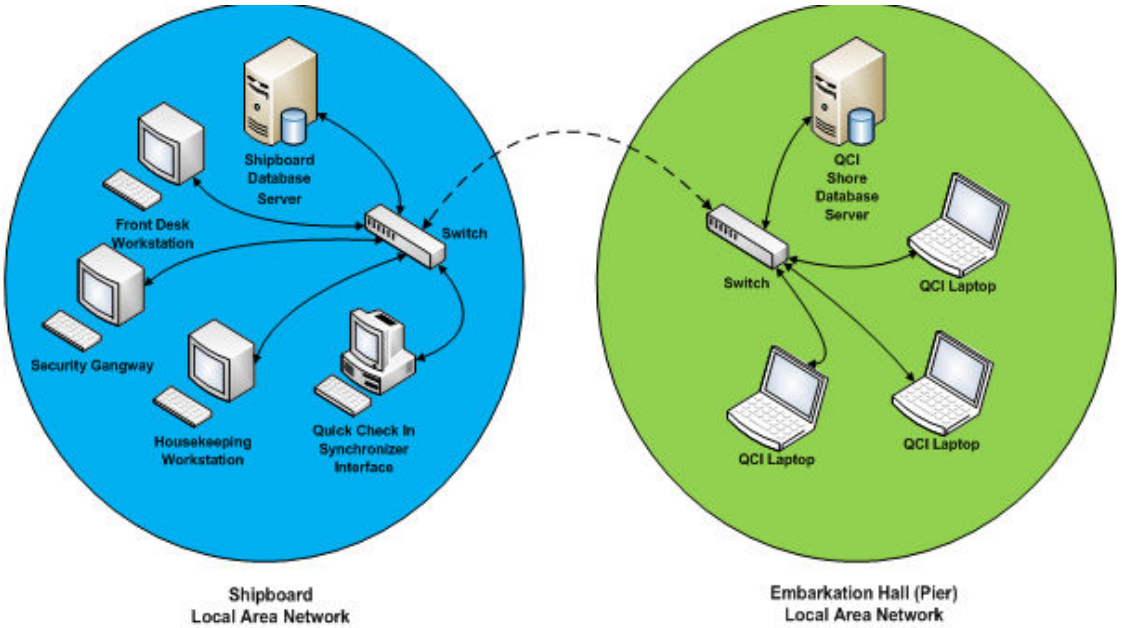
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Figure 2-2 QCI Sync Data Transfer



At the pier-side, a network connection between the shipboard and the pier must be established before starting up and connecting the QCI Shore database server to the pier network. The synchronization between the ship and the QCI Shore database is activated from the QCI Sync Interface on the shipboard.

Figure 2-3 QCI Sync Stretch

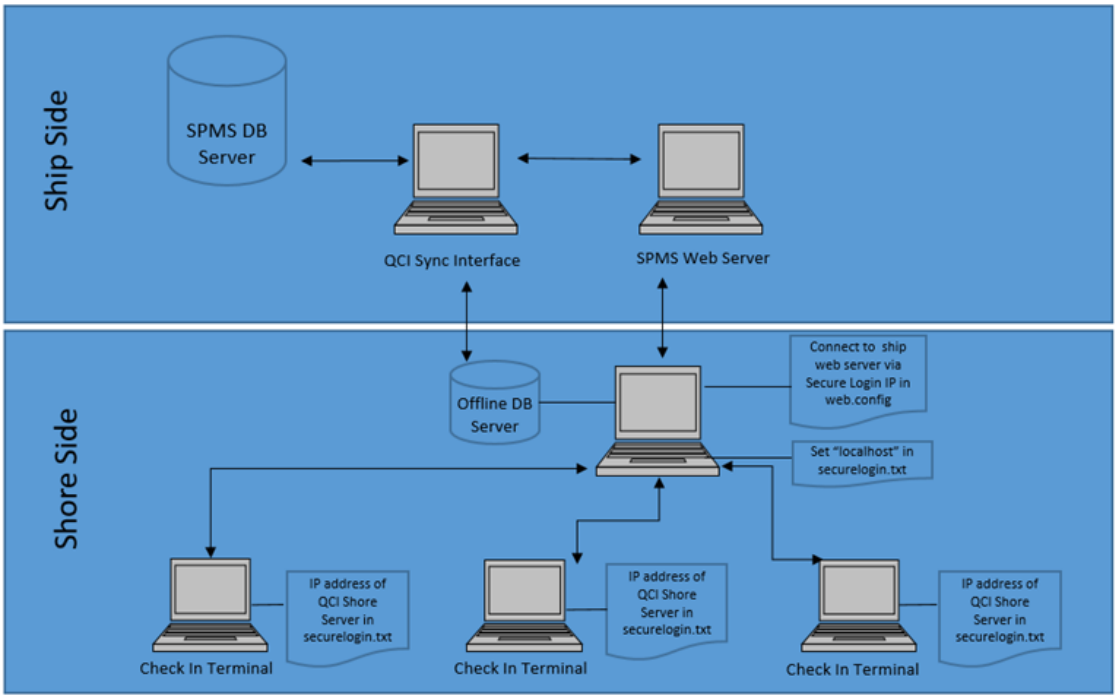


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Environment Setup

The diagram below illustrates the data flow for QCI Offline Check In environment at the Shore Side.

Figure 2-4 Environment Setup



Environment Setup for PC Running QCI Sync Interface

- The interface computer must be pre-installed with an Oracle Full Client installation that allows the QCI Sync Interface to access the Oracle import and export utility.
- Ensure the connection to the ship database is established. If the connection is not established, create an instance to connect the QCI Sync Interface running on shipside, and connect to the ShipDB. The **Connection Name** of the ship database is **SPMSShipDB** and points to the database service name (SID) **UID**.
- Establish the database connection to the Shore database. The **Connection Name** of the Shore database is **QCISHORE** and points to database SID **QCISHORE**.
- The Client PC will obtain the *Secure Credential* file from the ship IIS Web Server when connected.

Environment Setup for QCI Shore Database Server and Shore Secure Server

- The server must be pre-installed with Oracle Database Server Installation. The version of Oracle Database Edition of the QCI Shore database and Ship database must be identical. For example, if the ship is running on Oracle 19c, then the Shore QCI database must also run on Oracle 19c.
- Create a blank QCISHORE database that has an existing user. Both the ship and the Shore QCISHORE database password must be identical. If a different password is used, the connection will show **Disconnected**.

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- Ensure that the database connection to the Shore Database is established.
- The server must be pre-installed with SPMS Web Service. In web.config, define the **Connection Name** of the Shore Database (ShoreDB) installed on the server and the **Shore WebService IP** at SecureLogin. This is to make sure the server acts as a Secure Server when hosted at shoreside, allowing clients to connect to it.

Figure 2-5 QCI Sync WebService Configuration



- The server must be pre-installed with SPMS for OHC Tools and OHC Advanced Quick Check In. The securelogin.txt must point to QCI Shore Database Server's web server.
- Run the Windows Command Prompt as a Windows Administrator. Navigate to the Installed SPMS Application folder. For example, `C:\Program Files (x86)\Oracle Hospitality Cruise. Run the OHC Tools using the following command: "OHC Tools.exe" /m`
- Click the **Upgrade DPAPI Key** button. At the Security Login prompt, choose the Shore Database TNS and enter the Database Password for authorization.
- Key in the passphrase and click the **Update** button. The passphrase MUST be same the as Ship database.
- Upon completion, the encryption password and encryption key are stored in QCI Shore Database Server's Web Server.

Environment for PC Running OHC Advance Quick Check In at Shore Side.

- The server must be pre-installed with Oracle Client Installation.
- Ensure the database connection to the Shore Database is established.
- The Ship Id of the Shore Database (ShoreDB) must be the same as the Ship Database (ShipDB). For example; the SID of ShoreDB is SPMSShoreDB and points to the QCI SHORE database.
- The server must be pre-installed with OHC SPMS for the OHC Advanced Quick Check In to run and connect to shore database. The **securelogin.txt** must point to QCI Shore Database Server's web server in order to obtain encrypted password at the shore.

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> **Important**
>
> If there are other ships using the same Ship Id as the shore database, for example, Ship A and Ship B connect using the same TNS name and references the QCI Shore database, and before you perform a new Start Offline Mode on each ship, remove the Secure Credential file if it exist in QCI Shore Server and restart the IIS.
>
> Ensure you remove the Secure Credential file at all check in terminals too.

System Parameter

This section describes the parameters available to the QCI Sync module and is accessible through the **Administration** module, **System Setup, Parameter, General** group. You must configure these parameters before running the QCI Sync Interface.

Table 2-1 PAR Group General

PAR Name	PAR Value	Description
QCI Offline DB Terminate	24	Disallow the QCI Office DB to run if it is older than x hours. Specify in the parameter value. The default value is 24 hours.
QCI Offline DB Warning	12	Define when to prompt a warning message when the QCI Offline DB is older than x hour. The default value is 12 hours.
Pax BCard Track2 Length	16	The length of the `'BoardCC'` coded on Track 2. The value must be > 15.
QCI Sync Active Warning	12	Prompt a warning message when the QCI Offline DB is running more than x hours. The default value is 12 hours.

QCI Sync Interface

The QCI Sync Interface is an application that connects and synchronizes the Shipside database with the Shoreside database, showing both the database mode and connection statuses. Apart from that, the synchronization progress is also shown in the **Messages** tab of the interface.

At the program start up, and before synchronization commences, the application checks the status of both the databases, followed by the state of the database, whether it is in an 'Offline' or 'Unknown' mode, as illustrated in below figure. See the table below for an explanation of the status.

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Figure 2-6 QCI Sync Mode

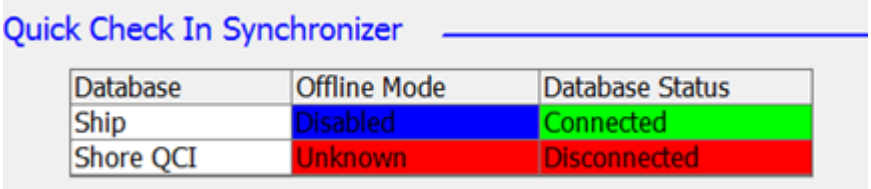


Table 2-2 QCI Sync Modes

Offline Mode	Database Status	Description
Unknown	Disconnected	The QCI Sync Interface is disconnected from the Shore QCI database, possibly due to a network issue, user UID does not exist or the Oracle Database Listener has not started, resulting to the interface not being able to determine the Offline Mode. The message *"Getting Shore QCI DB Status, please wait..."* appears when the interface tries to reconnect to the QCI Shore database every x seconds.
Disabled	Connected	The QCI Sync Interface is connected to the Ship and the Shore QCI database has Offline Mode as Disabled. The synchronization is not able to start and prompts this message *"Off-line mode not yet enable cannot sync."* appears.
Enabled	Connected	The QCI Sync Interface is connected to the Ship and the Shore QCI database has Offline Mode as Enabled. This indicates the synchronization has started.
Invalid	Invalid	The QCI Sync Interface is connected directly to the Shore QCI database. The system prompts this message 'Ship DB and Shore DB is the same'.

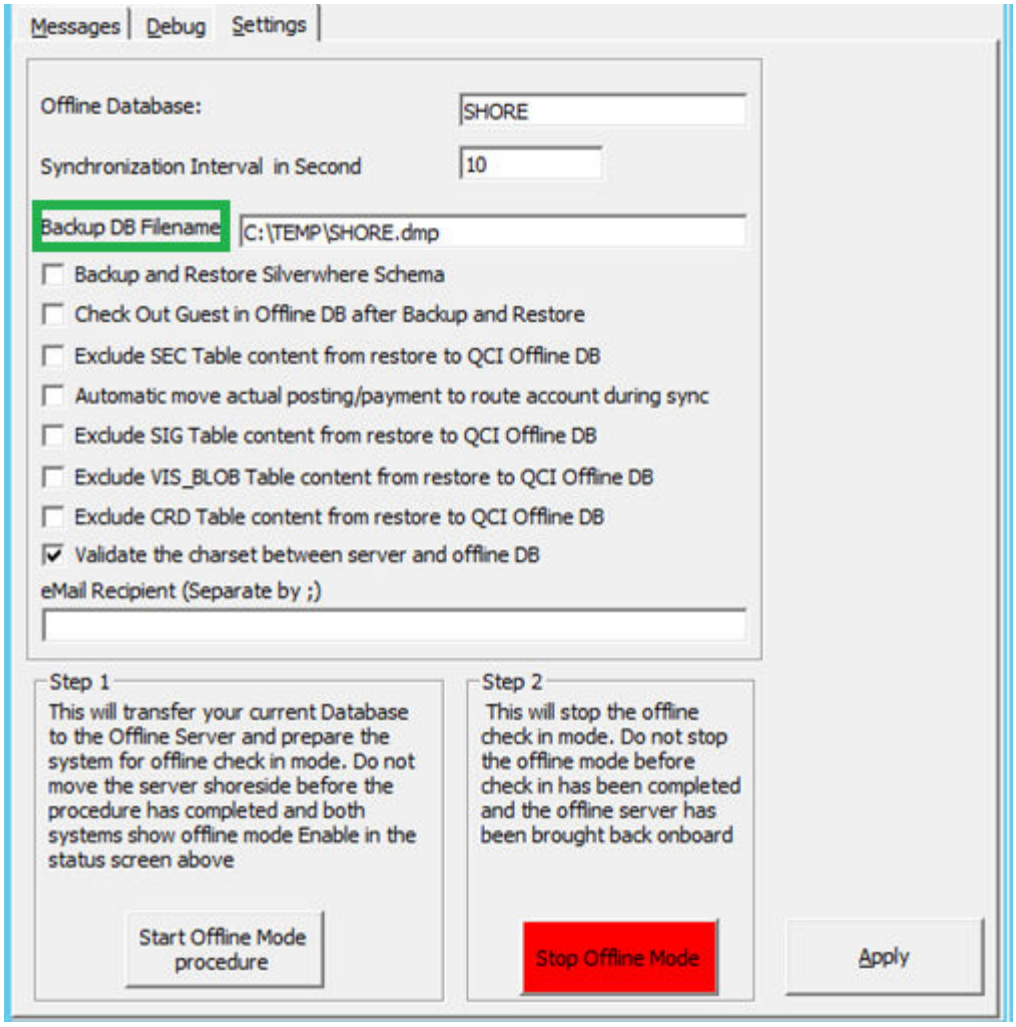
Configuring the Interface

This section describes the settings available in the interface Settings tab. To configure the interface, start the **QCI Sync Interface**, select the appropriate **checkboxes** at the Settings tab, and then click **Apply** to save the changes.

These settings are saved to the OHCSettings.par file in `C:\Public Document\Oracle Hospitality Cruise` folder

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Figure 2-7 QCI Sync Interface Settings



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Figure 2-8 QCI Sync Interface Setting —TDE

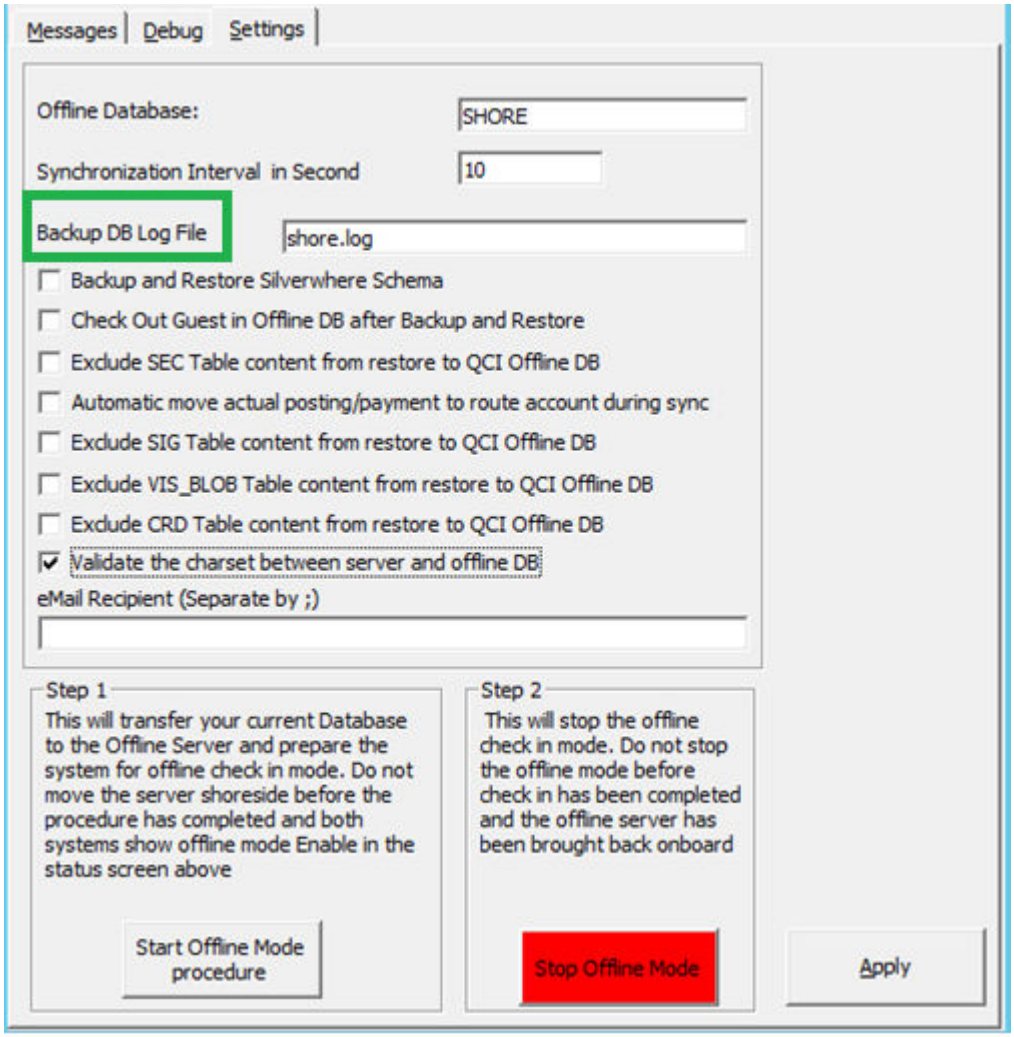


Table 2-3 QCI Sync Interface Settings

Parameter	Description
Offline Database	Defines the SID of the QCI Shore database. It must be identical to the one created in Oracle Net Manager.
Synchronization Interval in Second	Defines the interval time to before the synchronization between the ship and QCI Shore Database starts in *x* seconds. The default value is ten (10) seconds.

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Table 2-3 (Cont.) QCI Sync Interface Settings

Parameter	Description
Backup DB Filename	Defines the ship database backup file name. The same backup file is used for both the backup and restores processes. The user must define the full path of the name where the backup file resides and the file name extension must be `.dmp`. For example, `C:\Shipname.dmp.` If TDE is used, the field name changes to Backup DB Log File. You should provide only the file name excluding the full path, for example; backup. This file name will be used as the data import log file.
Backup and Restore SilverWhere Schema	Enables the interface to backup and restore the SilverWhere dining schema (BKSTG_DINING) from the ship database to the QCI Shore database and enable passenger's board card to be printed with dining details. The SilverWhere dining schema is imported once and no update is required from the ship to the QCI Shore Database.
Check Out Guest in Offline DB after Backup and Restore	Enables the interface to automatically check out all previous cruise passenger's reservations in the QCI Shore database, due to the backup and restore process that was not performed before the actual embarkation day. For example, user enabled the QCI Sync Interface using the last backup and restore.
Exclude SEC Table content from restore to QCI Offline DB	Excludes the pictures from the ship to the QCI Shore database when restoring from the backup and restore process. If this feature is checked, the time taken to backup and restore will take longer.
Automatic move actual posting/payment to route account during sync	Enables the interface to move actual posting and payment automatically to routed account when the Offline server is synched. The process commences after the database synchronization completes.
Exclude SIG Table content from restore to QCI Offline DB	Excludes the credit card signature captured when restoring from ship to QCI Shore database during the backup and restore process. If this is checked, the time taken to backup and restore will take longer .
Exclude VIS_BLOB Table content from restore to QCI Offline DB	Excludes the Travel Document image when restoring from ship to QCI Shore database during the backup and restore process. If this feature is checked, the time taken to backup and restore will take longer.
Exclude CRD Table content from restore to QCI Offline DB	Excludes the credit card records when restoring data from ship to QCI Shore database during backup and restore process. In the Guest Info window, the payment method will show as 'Credit Card' without the card details to comply with the Payment Card Industry (PCI) standards.

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Table 2-3 (Cont.) QCI Sync Interface Settings

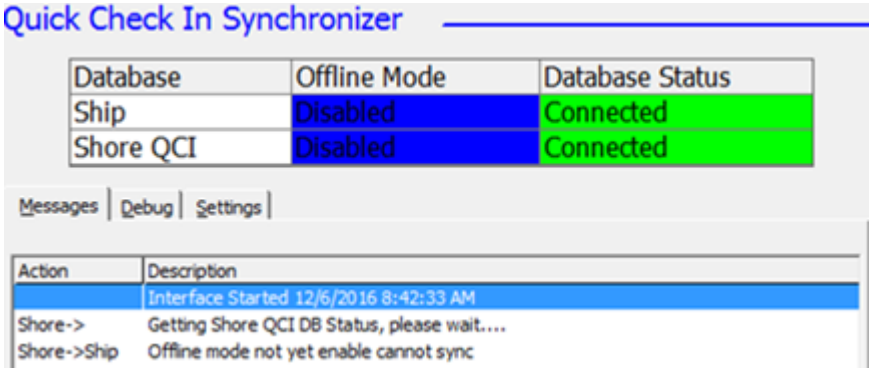
Parameter	Description
Validate the charset between server and offline DB	Verifies both the ship and Shore Database to ensure it has the same Charset before you are allowed to proceed. The system prompts this message *"Ship DB charset is xxx – shore DB charset is xxx. They do not match. Please inform Oracle Hospitality Cruise support so these can be adjusted. This is an informational message only and will not impact your current sync process."*.
eMail Recipient	Defines the system administrator's email address for notification to be sent when an error occurs during the synchronization process. The notification email is sent after every third synchronization. This requires an email server to be setup in the **Administration module, Parameter, Promo, SMTP Server IP Address**.

Starting the Offline Mode

The Information Technology (IT) Officer is responsible for switching on the QCI Shore database server and connecting to the SPMS local area network before the ship arrives at the port for a new cruise embarkation.

1. At the QCI Sync Interface PC, run the QCI Sync application.
2. Ensure both the ship and QCI Shore database status are as follow:
   - Database Status is *'Connected'*
   - Offline Mode is *'Disabled'*
   - Messages shows *'Offline mode not yet enable cannot sync'*

Figure 2-9 QCI Sync Offline Mode



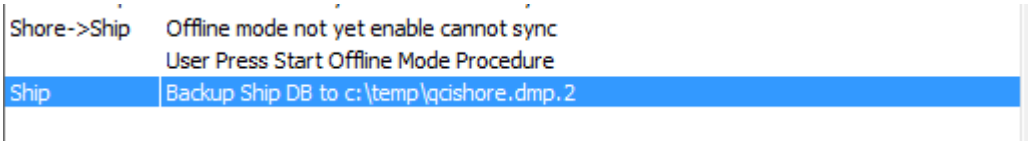
When the Ship or Shore QCI Database Offline Mode status shows *Enabled*, then the database mode must be stopped first, before clicking the **Start Offline Mode Procedure**. Otherwise, the system prompts an error message *Please stop the Offline Mode first before continue*.

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To stop the database mode, click the **Stop Offline Mode** of the Settings tab to refresh the Shore Database to a clean state.

3. On the interface **Settings** tab, click the **Start Offline Mode Procedure** button. The start of the backup process is indicated in the **Messages tab** as shown below.

Figure 2-10 QCI Sync Backup



> **Note**
>
> If TDE applies, the system does not backup the database.

4. If the checkbox **Backup and Restore SilverWhere Schema** is selected, you must enter the SilverWhere Schema password at the prompt, and then click **Confirm** to continue.

Synchronization Process

This section describes the synchronization process in chronological order during the backup of the shipboard database in the current state, and then restores the backup to the QCI Shore Database. The process differs if TDE is applied. See process listed in Table 2-5.

Table 2-4 Synchronization Process For Non TDE Database

Process	Description of Synchronization Tasks
Process 1	Performs the ship's database first backup routine on database schema only. The backup file refers to "*QCISHORE.dmp.2*".
Process 2	After the first backup routine completes, the interface then drops the QCI Shore database "UID" object and then the BKSTG_DINING" user. The interface waits for approximately 120 seconds for the QCI Shore database user "UID" to disconnect before the backup process begin.
Process 3	The interface creates all necessary triggers (TRIGGER_NAME like 'TR_QCI%') on the ship database for Offline Mode enabled. At this point, the ship database Offline Mode status change to "Enabled". All reservation changes made on the ship database from this point are updated to the CHG table for synchronization at a later stage.
Process 4	Perform ship's database second backup routine on database data and it excludes some non-required tables such as POS, MIB, and others. The backup file refers to "*QCISHORE.dmp.1*".

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Table 2-4 (Cont.) Synchronization Process For Non TDE Database

Process	Description of Synchronization Tasks
Process 5	Perform ship's database third backup routine that only contains VIS data and XDOC data without blog contents. The third backup file name is *QCISHORE.dmp.1.VIS* and *QCISHORE.dmp.1.XDOC.*
Process 6	Perform ship's database forth backup routine on BKSTG_DINING user data if user BKSTG_DINING exists in the ship database. The forth backup file name is *QCISHORE.dmp.3.*
Process 7	At the end of the ship database data backup routines, the command prompt window shall close automatically.
Process 8	Perform the first (1st) database restore routine on "UID" database data. (filename=*QCISHORE.dmp.1*). During the restore routine, the command prompt window opens, showing the restoration progress and closes when the process completes.
Process 9	Perform the second (2nd) database restore routine on "UID" data table VIS and XDOC (filename=*QCISHORE.dmp.1.VIS* and *QCISHORE.dmp.1.XDOC*). During the restore routine, the command prompt window opens, showing the restoration progress and closes when the process completes.
Process 10	Perform the third (3rd) database restore routine on "UID" database structure (filename=*QCISHORE.dmp.2*). During the restore routine, the command prompt window opens, showing the restoration progress and closes when the process completes.
Process 11	After completing all the restorations on the *"UID"* schema, the interface performs the forth database restore routine for user *"BKSTG_DINING"* data to the QCI Shore Database. (filename= *QCISHORE.dmp.3*). This process only applicable when the "Backup and Restore SilverWhere Schema" is selected.
Process 12	After the database restoration completes, the interface then updates the last backup date and time to the QCI Shore database parameter "QCI Offline DB Backup Date" and "QCI Offline DB Backup Date Server". For example, 20090306172359.
Process 13	All guests in the QCI Shore database are checked out if the checkbox *"Check Out Guest in Offline DB after Backup and Restore"* is selected in the Settings tab.

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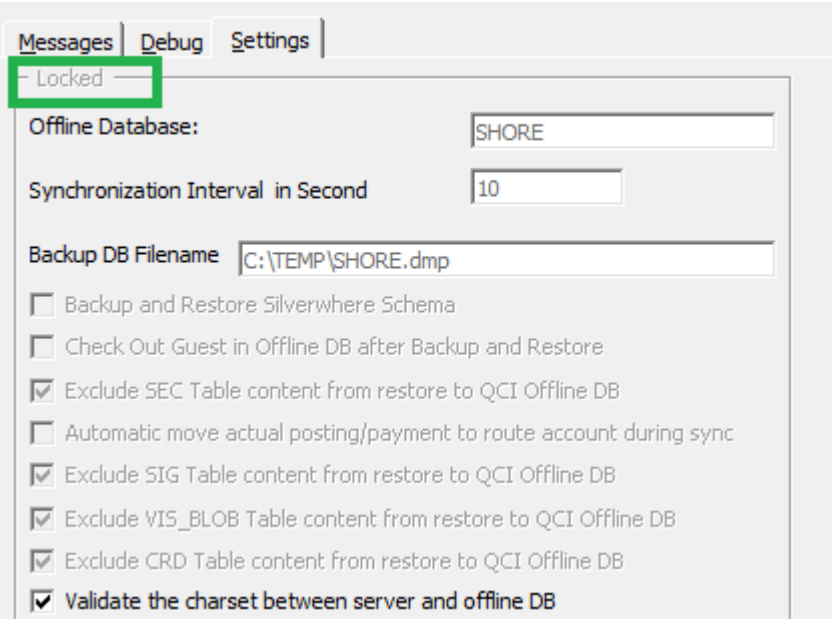
Table 2-4 (Cont.) Synchronization Process For Non TDE Database

Process	Description of Synchronization Tasks
Process 14	If option *"Automatic move actual posting to route account during sync"* is checked, when user enabled the routing at shore-side database, the posting and payment auto route to the payer when routing information is sync to ship database. If option *"Automatic move actual posting to route account during sync"* is deselected, when user enabled the routing at the shore-side database, only the routing information syncs to ship's database. The program allows routing the posting and payment to payer while synchronizing the routing information from shore to ship.
Process 15	Creates all necessary triggers and sequences and then disable all interfaces such as PBX, ITV, DR, VIP, ADPI and Door Lock Interfaces parameters in the QCI Shore Database.
Process 16	The QCI Shore database offline mode is *"Enabled"* and the message *"SPMS DB already ready with offline embarkation"* appears in the Messages tab.
Process 17	The system prompts a QCISync dialog box indicating the system is ready for Offline Mode and the server can be taken offline, ready to be taken into the terminal. Click **OK** to close the dialog box.

Synchronization Process for DB using TDE

The synchronization process for a database that uses TDE are lesser than the standard process, and are listed in below table.

Figure 2-11 QCI Synchronization DB Locked



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Table 2-5 QCI Synchronization Process for DB using TDE

Process	Description of Synchronization Tasks on DB using TDE
Process 1	The interface drops the QCI Shore database "UID" object and then the "BKSTG_DINING" user. The interface waits for approximately 120 seconds for the QCI Shore database user "UID" to disconnect before the backup process begins.
Process 2	The interface creates all necessary triggers (TRIGGER_NAME like 'TR_QCI%') on the ship database for Offline Mode enabled. At this point, the ship database Offline Mode status changes to "Enabled". All reservation changes made on the ship database from this point are updated to the CHG table for synchronization at a later stage.
Process 3	QCI Shore database performs the first database import routine on "UID" data schema only. During the import routine, the command prompt window opens, showing the import progress and closes when the process completes.
Process 4	QCI Shore database performs the second data import routine on "UID" data table VIS and XDOC without blob contents. During the data import routine, the command prompt window opens, showing the import progress and closes when the process completes.
Process 5	QCI Shore database perform the third data import routine on "UID" database structure. During the import routine, the command prompt window opens, showing the import progress and closes when the process completes.
Process 6	After completing all the restoration on "UID" schema, the interface performs the forth database import routine for user "BKSTG_DINING" data to the QCI Shore Database. This process is applicable only when the checkbox, "Backup and Restore SilverWhere Schema" is checked.
Process 7	After the database restoration completes, the interface then updates the last backup date and time to the QCI Shore database parameter, *"QCI Offline DB Backup Date"* and *"QCI Offline DB Backup Date Server"*. For example, 20090306172359.
Process 8	All guests in the QCI Shore database are checked out if the checkbox "Check Out Guest in Offline DB after Backup and Restore" is selected in the Settings tab.

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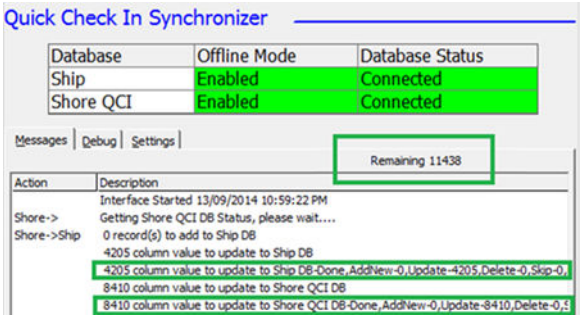
Table 2-5 (Cont.) QCI Synchronization Process for DB using TDE

Process	Description of Synchronization Tasks on DB using TDE
Process 9	If option *"Automatic move actual posting to route account during sync"* is selected, when the user enables the routing at the shore-side database, the posting and payment auto route to payer when routing information is synchronized to the ship database. If the *"Automatic move actual posting to route account during sync"* option is deselected, when the user enables the routing at shore-side database, only the routing information is synchronized to the ship database. Program allows routing the posting and payment to payer while synchronizing the routing information from shore to ship.
Process 10	Creates all necessary triggers and sequences and then disable all interfaces such as PBX, ITV, DR, VIP, ADPI and Door Lock Interfaces parameters in the QCI Shore Database.
Process 11	The QCI Shore Database offline mode is "ENABLED" and the message, *"SPMS DB already ready with offline embarkation"* appears in the Messages tab.
Process 12	The system prompts a QCISync dialog box indicating the system is ready for Offline Mode. Click **OK** to close the dialog box.
Process 13	The system disables all parameters in the Settings tab and a dimmed 'Locked' is shown on the window when the Offline Mode is ready.

Below are some examples of records that were added from the QCI Shore database to the ship database or vice versa.

- The system indicates the number of remaining records to process, update, or skip during synchronization in the **Messages** tab.

Figure 2-12 Quick Check In Synchronizer

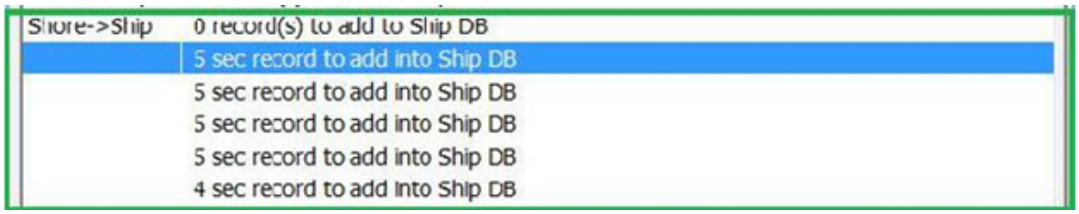


- The synchronization processes five pictures data (SEC records) per batch and is only applicable when adding new SEC records from Shore to Ship. Messages shown in the **Messages** tab are *'x value Update to Ship DB'* when updating of SEC from shore to ship

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and *'Adding new record to shore'* when a new record is added in Ship DB and transferred to shore DB. Any changes made to the SEC table from the ship do not transfer to the Shore Database.

Figure 2-13 QCI Sync Number of Picture Record Processed



- The QCI Sync process excludes the data below by default when synchronizing the shipboard database to the offline database:
  - Fleet Management System (FMS) data
  - Material Management System (MMS) data
  - Payroll data such as ADC, ADP, ADS, ADT, ADU, COH, COS, CTR, CTT, DDT, DPL, PAY, PCY, PGD, PGE, PGL, SED, SGT, SLB, SPD, SPO, SPP, SPT, SSH.
  - ResOnline data and Crew Management System (CMS) data such as RSP, RSL, RSD, FCCMSMSGS, CMSCHG, CMSRSL, CMSRSP, CMSRSD, FMS_TRANSFER, CHG_MOBILE_IN, CMS_UPL, CMS_UPL_RSP.
  - Data from table starts with 'X' for example, XAPP, XCET, XCTY, XDET, XMVW, XPDF, XSCP, XTIM, XUAF, XUSP, XUSR, XUST, XVEN, XDOC, with the exception of XDOC_GROUP < 12
- The QCI Sync does not synchronize the credit card (CCA) records to an offline database. When obtaining the credit card in an offline mode, the QCI Sync Interface checks if the parameter **Card Interface Name** is **Enabled** in the ship database. If it is, the CCA record is created in the ship database. Otherwise, the Synchronization interface only synchronizes the credit card registration (CRD) record.
- When the QCI Shore Database server is ready for transfer from the ship to the terminal, the IT Officer will shutdown the QCI server and relocate the server to the terminal for embarkation preparation.
- When the QCI Shore Database server is down, the interface for QCI Shore Database status will indicates as "Disconnected" and the message *"Shore QCI DB is offline, cannot sync"* appears in the Messages tab. The message *"Resetting connection"* indicates the interface continue to check and attempt to reconnect to the database. This is due the interface application were not running or closed without pressing the **Stop Offline Mode**
- After transferring the QCI Shore Database server to the terminal, start it up and connect to the shore network. The Shore QCI Database Status changes to *'Connected'* within a few minutes. If the terminal does not have network access to the ShipDB, the IT Officer is required to shut down the Shore QCI database server and transfer the server back to the ship at the end of the pier embarkation, before connecting the shore Offline Database Server to the shipboard network.

The QCI Sync Interface starts the synchronizing of the ship and shore QCI database once a connection is established.

Below is the Offline Mode Notification that might prompt when the program is running a database in QCI Offline Mode and the QCI Shore database parameter settings are:

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- QCI Offline DB Warning = 12
- QCI Offline DB Terminate = 24

Table 2-6 Offline Mode Notification

Notification	Description
Notification 1	The system prompts the message *The QCI offline DB is older than 12 hours,* when running the QCI program with date time older than the client computer date time by 12 hours. Click **OK** closes the program.
Notification 2	The QCI program opens when the QCI Synchronization interface is *Enabled*. Otherwise, the system prompt the message *QCI Offline Sync is not enabled, cannot proceed,* and clicking **OK** closes the program.
Notification 3	The system prompts a message *The QCI offline DB is older than 24 hours, program will terminate now,* when running the QCI program date/time is older than the client computer date time by 24 hours. Click **OK** closes the program.

Below is the Offline Mode Notification that might prompt when the program is running on a database that is in QCI Offline Mode and the QCI Shore database parameter QCI Sync Active Warning =12.

Table 2-7 Offline Mode Notification With QCI Sync Active Warning —12

Notification	Description
Notification 1	The system prompts the message *QCI Sync have been running for more than 14 hours, please call IT.,* when these applications are started and running; Management, Administrator, Crew, and others with date/time older than the client computer date/time by 12 hours. Click **OK** allows you to proceed.
Notification 2	The system prompts the message *The record had been sync to server, cannot edit, please retry* when you add travel document in shore-side database while the record is being synchronized over to the ship database.
Notification 3	The system prompts the message *This application is connected to Quick Check In Offline database. Please take note that any changes made in this application might not synchronize back to ship database. The Quick Check In Offline database is only work with Advance Quick Check In and Quick Check In application.* when an application other than AQCI is started.
Notification 4	When the connection drops while processing transfer data, the application stops processing the record and prompts a message *QCISHORE DB is offline or Ship DB is down*. The application continues to process the records when the connection is restored.

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Table 2-7 (Cont.) Offline Mode Notification With QCI Sync Active Warning —12

Notification	Description
Notification 5	If QCI Sync retries to synchronize those invalid records when user presses the **Stop Offline Mode**, the application prompts a message *There is error sync 1 record(s), do you want to continue? Click Yes will Ignore and Continue, No - Contact Admin to fix the invalid record in CHG table,* and ignores the invalid record or fixes the records before stopping the Offline mode.
Notification 6	The application continues to retry the invalid records (CHG records) and sends an email alert after every three retries. The system then displays Message *eMail Send Successful to...*
Notification 7	The system does not allow multiple instances running on a different workstation and prompts the message *OHC QCI Sync.exe is running at workstation xxx.*

Log Messages

The system logs all messages onto a log file in the following format:

```
<timestamp><location><message>
For example: <2018-09-11 00:45:11>Ship SELECT statement
```

Log Message during data sync

Table 2-8 Log Message Type In Data Sync

Log Message Type	Log Message Format with Sample Data
Initialization - QCI Sync interface started	`Start<HT>Interface Started - (<version number>)(<work station>)(<IP address>) 9/11/2018 12:45:05 AM`
Sync Reservation Records	• `Shore->Ship<HT> 3 record(s) to add to Ship DB` Note: There are 3 new reservation found at shore. System detects new reservation by running SELECT statement. • `Ship-><HT>` Adding RES record. Note: System is creating reservation at shipside. It will sync record in UXP, RES, VIS, SEC, and CRD. • `Ship->Insert` statement. Note: Insert new IDs into QCI table at ship DB. This table links ship and shore reservation records. • `<HT>ResAcc - UID` sync to Ship DB. Note: New reservation record with ID UID is created at ship DB.

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Table 2-8 (Cont.) Log Message Type In Data Sync

Log Message Type	Log Message Format with Sample Data
Sync Posting Records	• `<HT>Shore->SELECT` statement Note: QCI Sync checks number of new records found in POS table at shore DB. If record is found, it will synchronize the record over to ship DB.
Sync Changes	• `Ship->SELECT` statement. Note: Load changes in CHG table at ship and shore DB. It skips log message. • Same Update Found, remove old value - `0,key=UXPUXP_A_POS_DEBITUD(UID)` Note: Same update found in CHG tables. Old value `= chg_value; key = chg_table, chg_column and chg_record_id.` QCI Sync compares CHG records at shore and ship DB. Concatenation of 3 columns - `chg_table, chg_column and chg_record_id` is used in this comparison. Old value will be removed. • `<HT> 775 column value to update to Ship DB` Note: There are 775 of changes found in shore. • `Ship->update` statement. Note: updating changes from shore DB to ship DB. • `Ship->SELECT` statement. Note: System sync image in `sec_image` at SEC table. • `<HT>Update Skip for RES->RES_EMB_PC->UID->TO_DATE('2018-09-11 03:31:25', 'YYYY-MM-DD HH24:MI:SS')->9/10/2018 3:31:25 PM->9/10/2018 9:26:32 PM` Note: QCI Sync skips the update if modify date (9/10/2018 3:31:25 PM) is less than record's last modified date (9/10/2018 9:26:32 PM).
Error	• `Error<HT>Shore->UpdateChg\Line#\2253\ORA-12899: value too large for column "UID"."UXP"."UXP_A_CITY" (actual: 31, maximum: 30)<CR><LF>chg_id = UID, chg_table = UXP, chg_column = ALL, chg_record_id = UID, chg_value = , chg_moddate = 9/10/2018 11:51:13 AM` Note: We have to make sure columns in both shore and ship database have the same length. • `<HT> 232 column value to update to Shore QCI DB-Done,AddNew-230,Update--228,Delete-0,Skip-0,Error-230` Note: Summary of records after sync is complete. Data sync will start again after x seconds, it is based on the setting at the interface.

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Stop Offline Mode

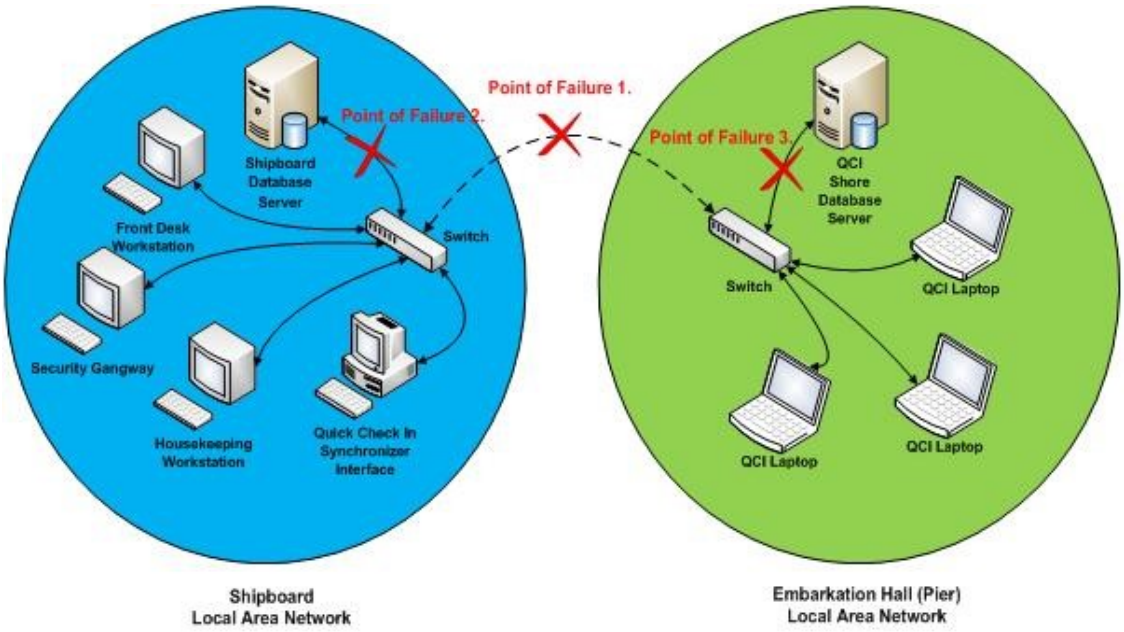
At the end of the embarkation at the pier, both the shipboard and the QCI Shore database are synchronized. If no activities appear in the **Messages** tab, the IT Officer can then proceed to stop the Offline Mode process.

1. At the Settings tab, click **Stop Offline Mode**.
2. The system prompts, *Are you sure you want to stop the Offline Mode. You should only stop the Offline Mode when all embarkation is finished.* Click **Yes** to stop the offline mode process.
3. When the security login dialog box opens, you must provide a valid user name and the password. Click **Login** to continue.
4. When one of the Quick Check-In clients remains connected to the shore QCI database, the system prompts an error message in the **Messages** tab with the workstation/source name that has the application open and terminates the **Stop Offline Mode Procedure**. The IT Officer must close the application and then repeat the **Stop Offline Mode Procedure** again.
5. The interface starts to remove the offline triggers from the QCI Shore database and the ship database when the process begins, and set the Offline Mode to *Disabled* for the ship and shore QCI. At this point, you may then close the QCI Sync Interface.

Troubleshooting

This section describes the failure possibilities that you may encounter on the embarkation day.

Figure 2-14 QCI Sync Failure Points



- **Failure 1**

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Network connection lost between the shipboard database and the shore-side QCI database.

- The database synchronization between the ship and the QCI Shore database has stopped.
- Check and ensure the Oracle Database Listener has started and user 'UID' and password exist in the database schema.
- This does not affect the ship operations and the shore embarkation operation. All the reservation changes made on both databases are logged to CHG table for synchronization at a later stage.
- The interface tries to reconnect to the shore QCI database every number of seconds, depending on the time interval set up on the interface and synchronization resumes after the network connection is restored.

- **Failure 2**

  The Ship database server network cable disconnected or database service has stopped.

  - The database synchronization between the ship and the QCI Shore database has stopped.
  - This does not affect the shore embarkation operation and all the reservation changes are logged to CHG table to be synchronized later. The shipboard operation is affected due to the lost connection from the shipboard database server.
  - The error message appears on QCI Synchronizer Interface is: `"ORA-03114: not connected to ORACLE"`. The error message appears on ship workstation is `"ORA-03113: end-of-file on communication channel"`.

- **Failure 3**

  QCI Shore database server network cable is disconnected or database service has stopped.

  - The synchronization between the ship and the QCI Shore database has stopped. The shipboard operation is not affected and all the reservation changes are logged in the CHG table for synchronization at a later.
  - This affects the shore embarkation operation due to the lost connection from the QCI Shore database server.
  - The error message appears on QCI workstation is: `"ORA-03113: end-of-file on communication channel."`.

- **Failure 4**

  One of the DMP failed to restore.

  - When the program tries to restore the `'BKSTG_DINING'` schema, one of the DMP is missing due to certain reasons, the import log shows:*'IMP-00037: Character set marker unknown'* and *'IMP-00000: Import terminated unsuccessfully'*.
  - This error is written to the QCISyncLog.
  - The *'Start QCI Offline Mode'* process aborts.

- **Failure 5**

  Failed to run Database Installer or Tools Encryption Key Manager.

  - The QCI Sync is shut down, possibly preformed using End Task Program but Offline Mode is still shown Enabled.

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  - You are not allowed to run the DB Installer or Change Encryption Key. A message prompts: *QCI Sync is running, please stop QCI Sync first*.
  - You are required to run QCI Sync to perform Stop Offline Mode.

- **Failure 6**

  QCI Sync returned *'Error sending to DR'*

  - The application tries to send a check-in status to an offline Dining Interface.
  - Verify that the Dining Interface is running.

- **Failure 7**

  QCI Sync hang

  - Run the 1st script to find out which session ID could possibly lock the database and the 2nd script to kill that session. For further assistance, contact Customer Support.

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Part II
Activities

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3

Event Management

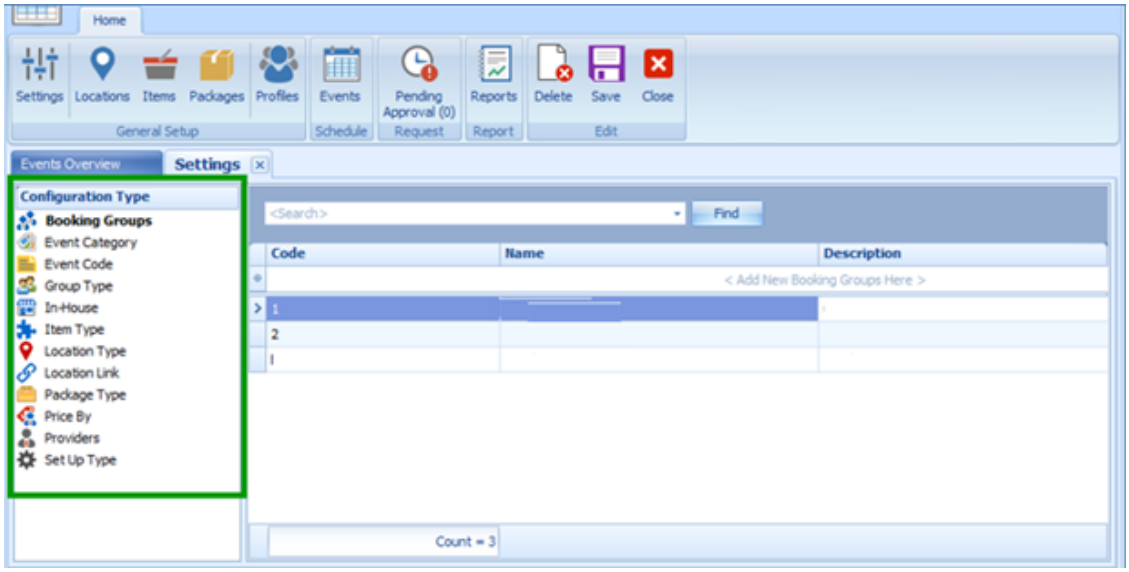
The Event Management module facilitates the organization of shipboard events by managing function space, procuring equipment, and arranging catering. It also offers integration with shore-side platforms.

General Setup

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

Event Settings Overview

Figure 3-1 System Setup



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

Configuration Type

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

- **Booking Group:** The Booking Group holds the security codes that determine who is allowed to book or change an event location.

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- **Event Category:** The Event Category code is used to categorize the type of event and is mainly used in report printing.
- **Event Code:** The Event Code holds the Priced By, Event Category, and Event Name that enables a quick entry of an Event on the Event Detail Form.
- **Group Type:** The Group Type code defines the specific type of Group, which vary from one Cruise Line to another.
- **In-House:** The In-House code defines an event category associated with the department or area for a non-group event.
- **Item Type:** The Item Type code defines the items by groups, for example, utensils, linens, furniture and much more.
- **Location Link:** The Location Link holds a generic code for a location that groups a few locations, to facilitate the copying of templates from one ship to another.
- **Package Type:** The Package Type defines the packages used to help find a specific package.
- **Price By:** This stores the price by codes available to the cruise liner. See the table below:

Table 3-1 Price by Configuration Type

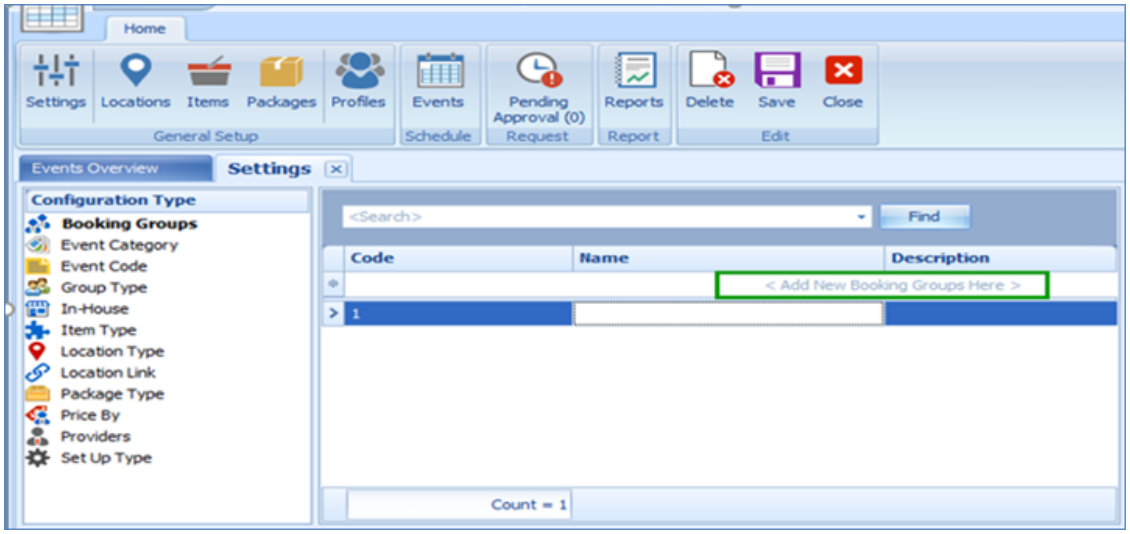
Field Name	Description
C	Consumption
F	Fixed
A	Fixed Guests
R	Fixed Cabins
L	Calculated Guests
S	Calculated Cabins

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

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Adding New Configuration Codes

Figure 3-2 New Configuration Codes Window



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

Editing Configured Code

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

Deleting Configured Code

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

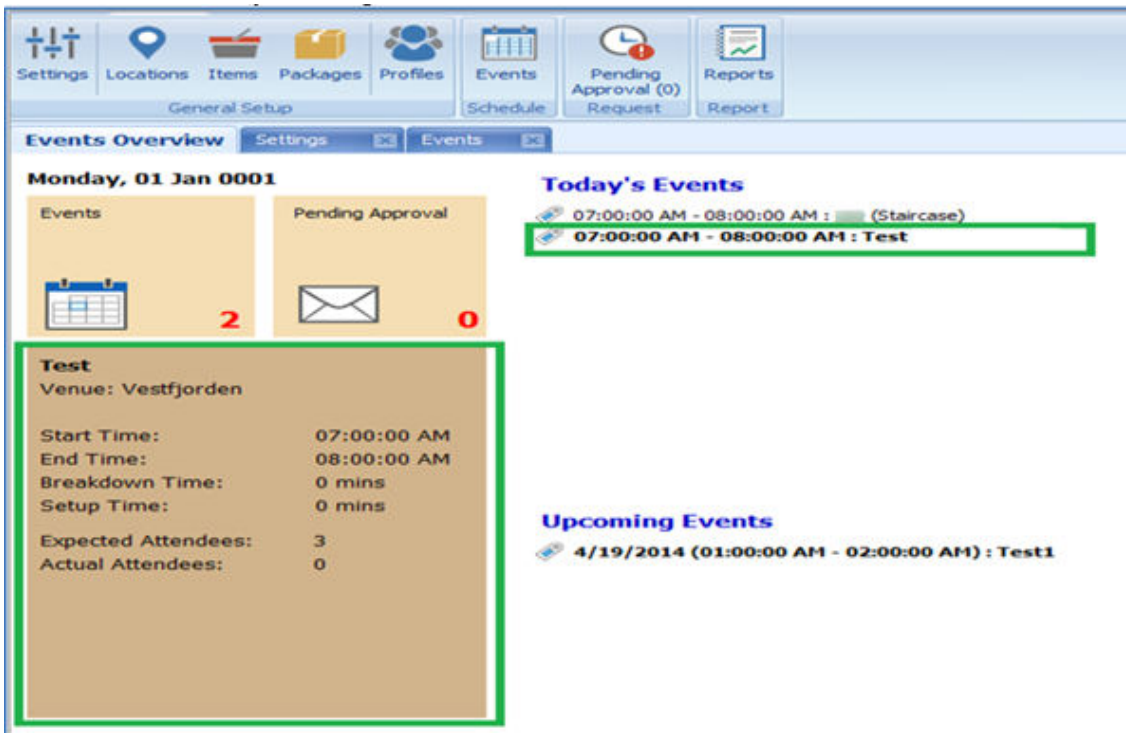
Searching for Configured Code

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

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Events Overview

Figure 3-3 Events Overview

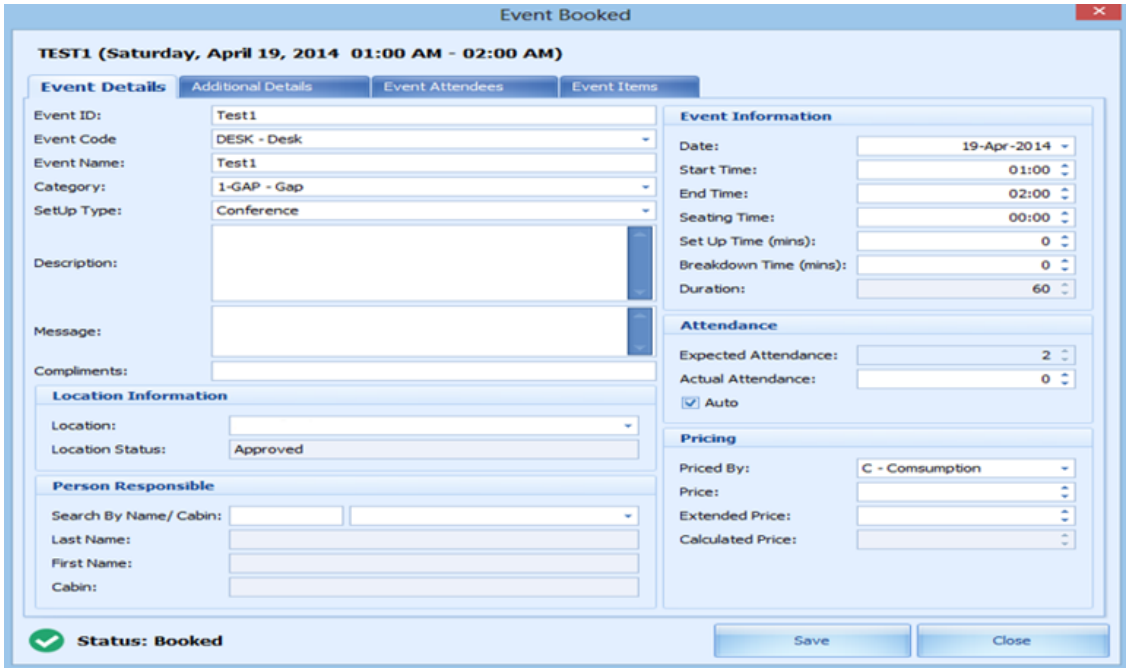


The Events Overview shows the summary of events for today and upcoming events with the summary of total events pending approval. Click the functions available on the window to view additional event information details.

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

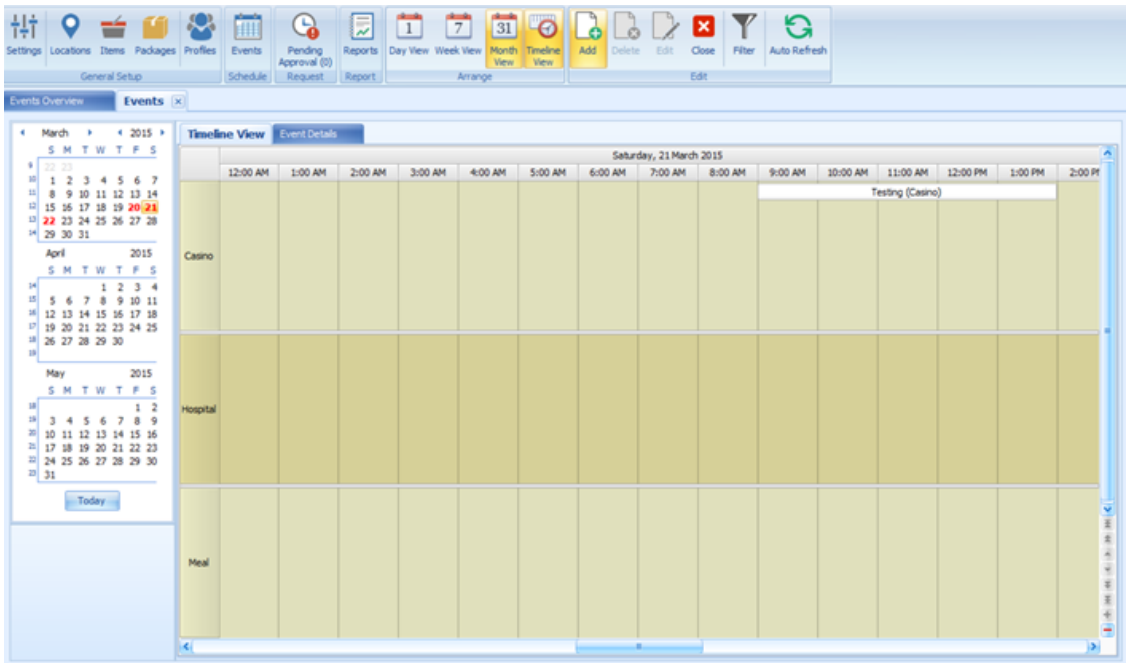
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Figure 3-4 Event Booked



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

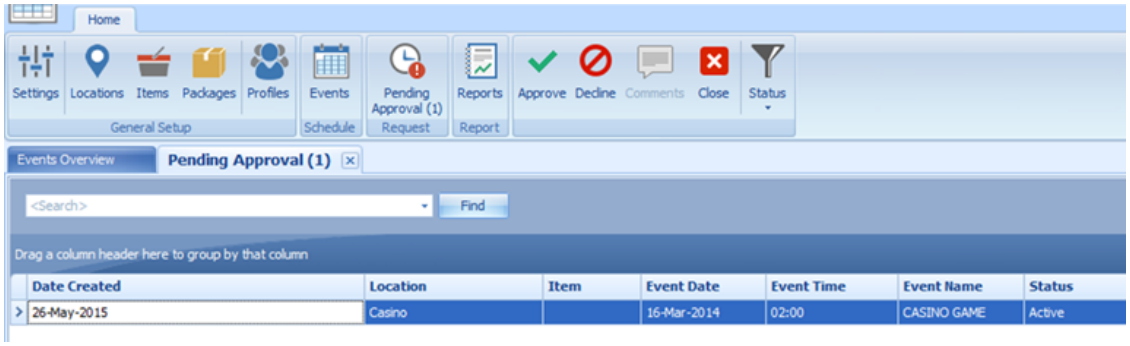
Figure 3-5 Events —Timeline View



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

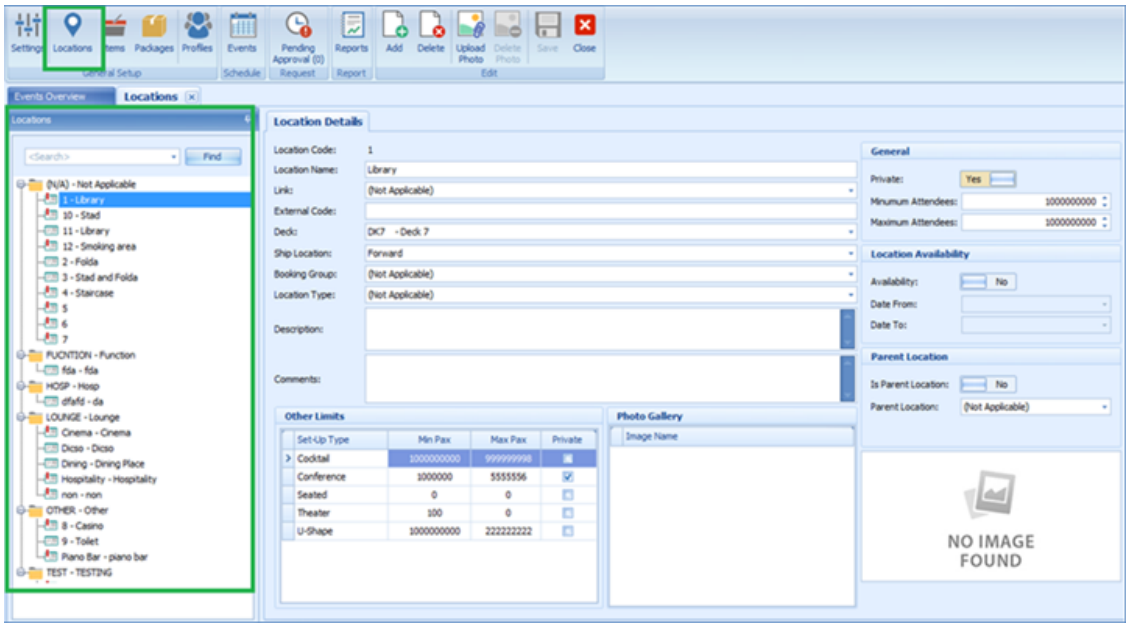
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Figure 3-6 Event - Pending Approval Tab



Locations Setup

Figure 3-7 Locations Tab



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

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

Adding New Location

1. Click **Location** from the General Setup group.
2. On the Location tab, the sub-locations are listed in a container view. Click the **+** button to expand the container list.
3. To add a new location, select the main location, and then click **Add** on the ribbon bar.

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4. In the Location Details section, enter all the necessary fields. The Location Code, Location Name, Booking Group, and Location Type are mandatory fields and the system prompts an error when the field is empty.
5. Navigate to the Other Limits section, select the **Set-Up Type** suitable for this location, enter the minimum/maximum number of person allowed for each seating type and select the **Private** checkbox for events that are held privately.
6. Click the **Upload Photo** icon on the ribbon bar to attach images of the location to the Photo Gallery section.
7. At the General section, insert the minimum/maximum number of attendees allowed using the arrow up/down key. Turning the **Private** toggle to **Yes** indicates that the location has other events at the same time.
8. At the Location Availability section, the availability is default to **Yes**. Sliding it to **No** makes the location unavailable. Select the available date from/to using the date editor.
9. At the Parent Location section, select the **Parent Location** from the drop-down list if it is a sub-location. Sliding the toggle to **Yes** makes the location a Parent Location.
10. Click **Save** on the ribbon bar to save the location.

Editing a Location

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

Deleting a Location

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

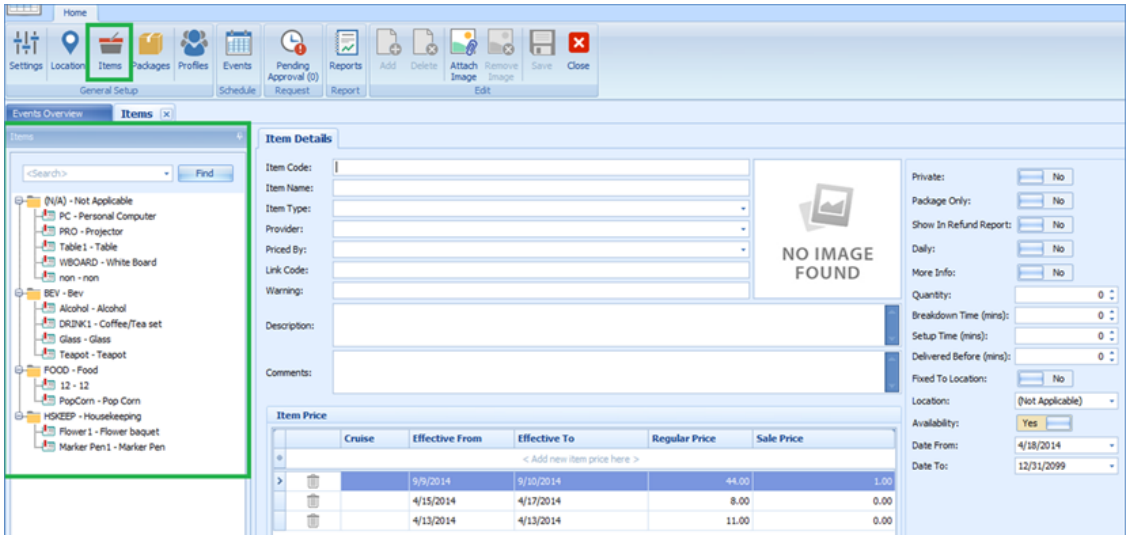
Searching a Location

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

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Items Setup

Figure 3-8 Items Tab



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

Table 3-2 Control Key in Item Price

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

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Table 3-2 (Cont.) Control Key in Item Price

Field Name	Description
Availability	Indicates the item's availability during a specific period.

Adding an Item/Price

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

Deleting an Item

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

Deleting an Item Price

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

Events Management

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

Types of View

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

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Figure 3-9 Events – Day View

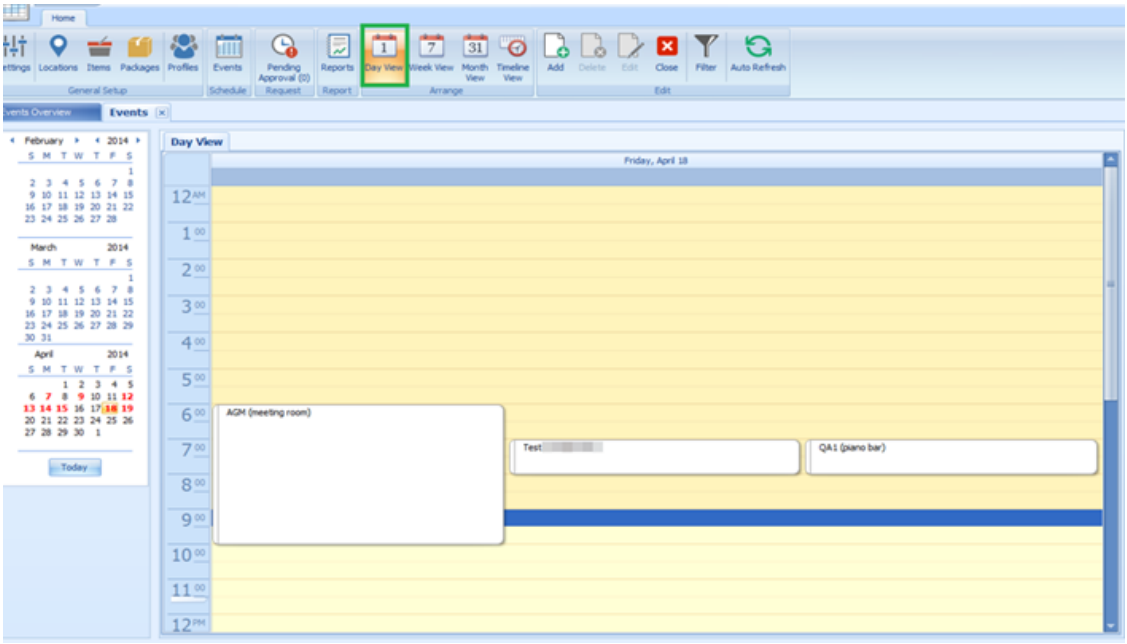
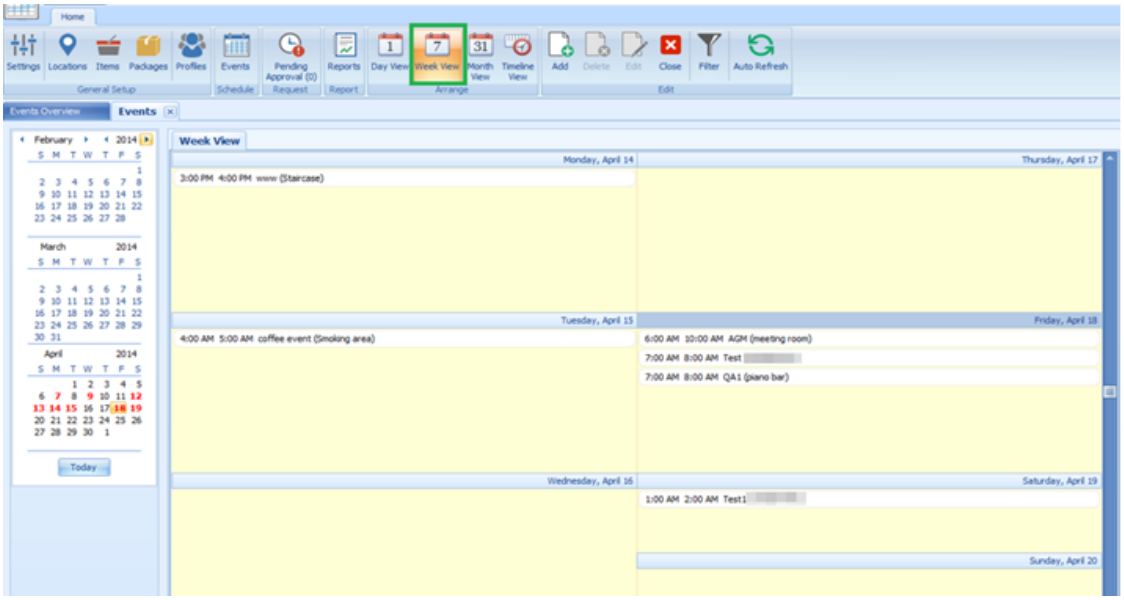


Figure 3-10 Events – Week View



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Figure 3-11 Events – Monthly View

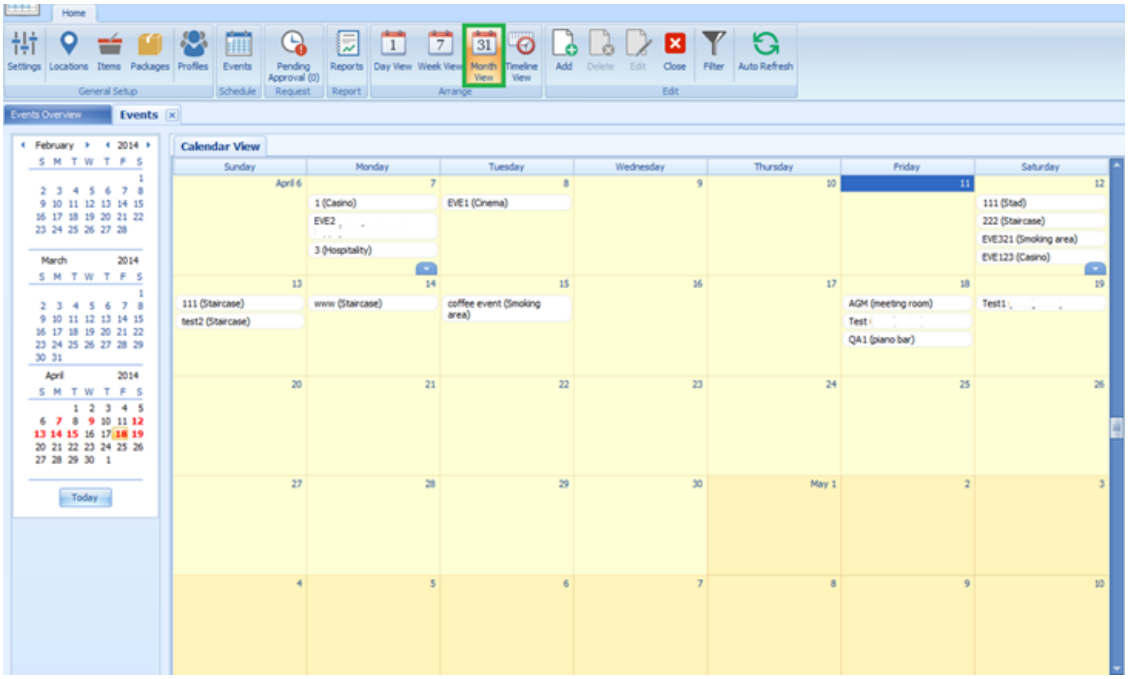
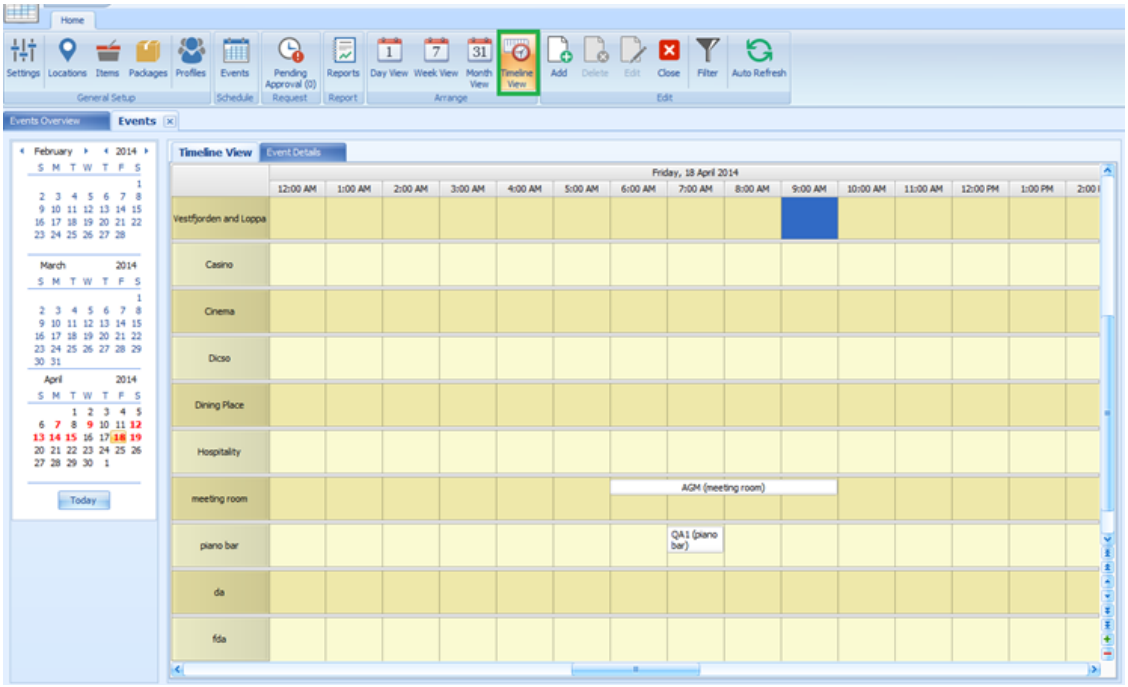


Figure 3-12 Events – Timeline View



To select the type of view to display,

1. Click **Event** at the ribbon bar, then navigate to the **Arrange** group and select the view.
2. On the left of the Events tab, select the **date** using the date editor.

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3. Locations for events are displayed on the left of the Events tab. If there is an event booked at that location, the event name is shown in a tree view under the location.
4. Double-clicking an event on the calendar view displays the event by location and start/end time.
5. Clicking **More Details** opens the Event Booked form, which displays more information of the event, additional details, event attendees and event items booked.

Table 3-3 Event Booking Status

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

Adding New Event

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

To add an event,

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

Additional Details

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

Table 3-4 Field Definition of Additional Tab

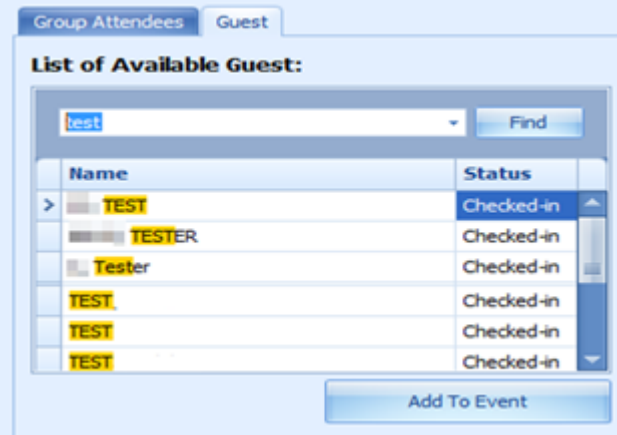
Field Name	Description
Print Time	The print time for the client itinerary if the event time is to be shown differently. For example, if a sail away party is scheduled for 5pm for 60 minutes, a print time can be after the boat drill.
Print Location	A location description that overrides the default printer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

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Event Attendees

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

Figure 3-13 Event Attendees List

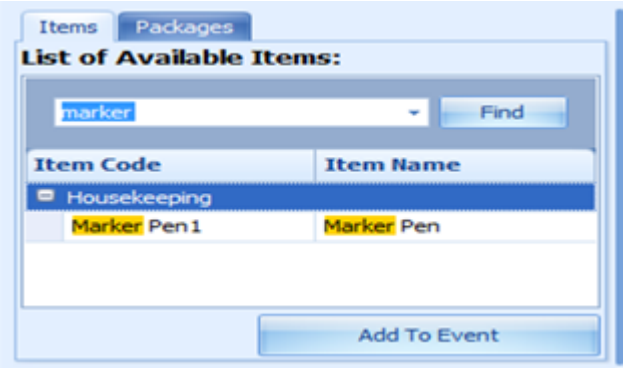


1. To add an attendee, navigate to the **Event Attendees** tab of the selected group.
2. In the Attendees selection window, select the guest to add from the Group Attendees or Guest tab, and then click **Add to Event**.
3. To remove the attendee, select the attendee from the existing list and click **Remove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

Event Items

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

Figure 3-14 Event Items



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

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

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

Deleting an Event

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

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

Editing an Event

To change the event details,

1. Select the event from the Event Overview window, then click the **Edit** button at the ribbon bar to open the Event Booking form.
2. Alternatively, you may right-click on the Event and select **Edit Event** from the context menu, then click **More Details** to open the Event Booking form.
3. Edit the information and then click **Save** to update the changes made.

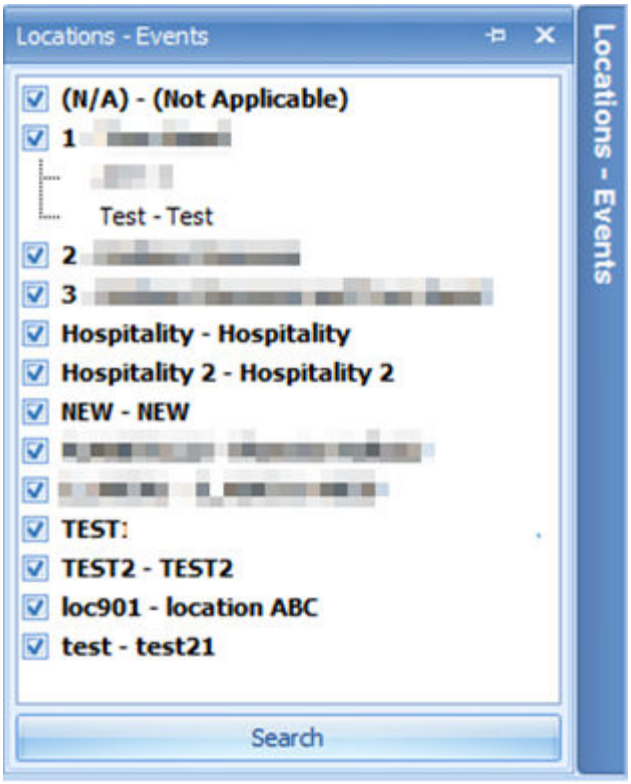
Filter Options

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

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

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Figure 3-15 Filter Options



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

Auto Refresh

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

Pending Approval

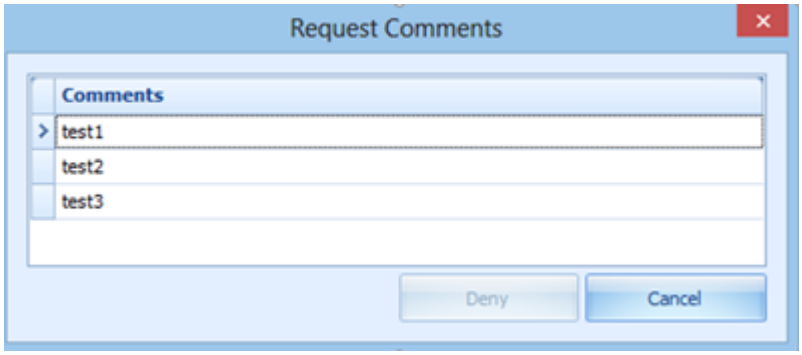
Almost all the event data is imported from DGS ResOnline with pending approval status. To approve/decline these bookings, you must have access rights #4657 granted. The Pending Approval icon is disabled if you do not have the access rights #4657 login.

Request Comments

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

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Figure 3-16 Request Comments



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

Table 3-5 Status Filter in Comments

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

Approving a Pending Request

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

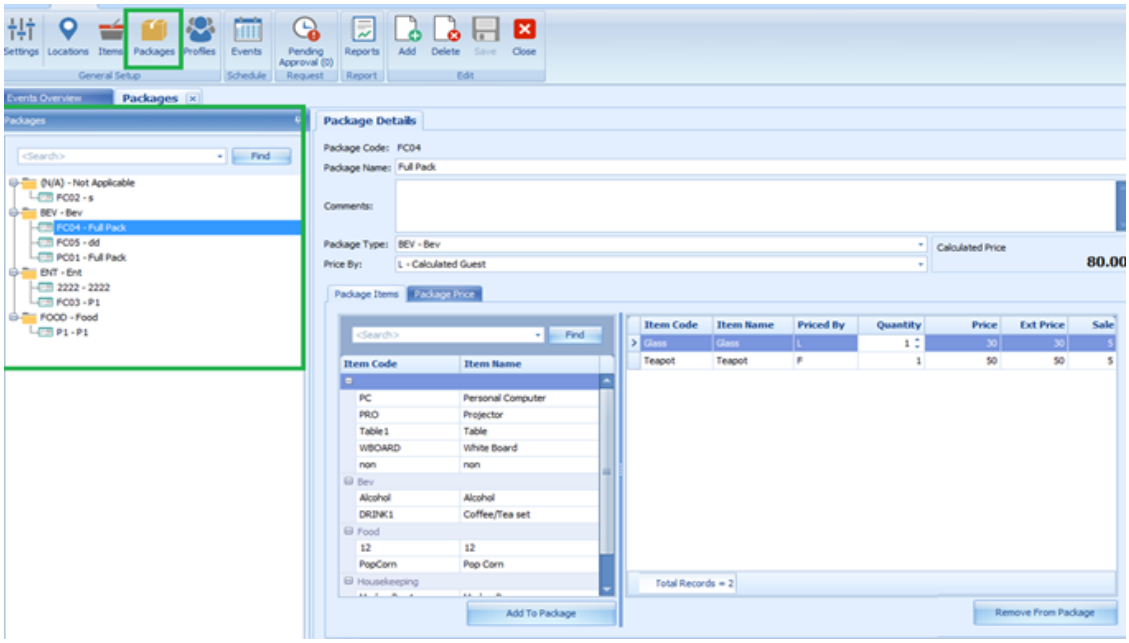
Declining a Pending Request

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

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Package Setup

Figure 3-17 Packages Tab



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

Adding New Package and Package Item

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

Removing Package Items

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

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Adding New Package Price

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

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

Removing Package Price

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

Editing a Package

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

Deleting a Package

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

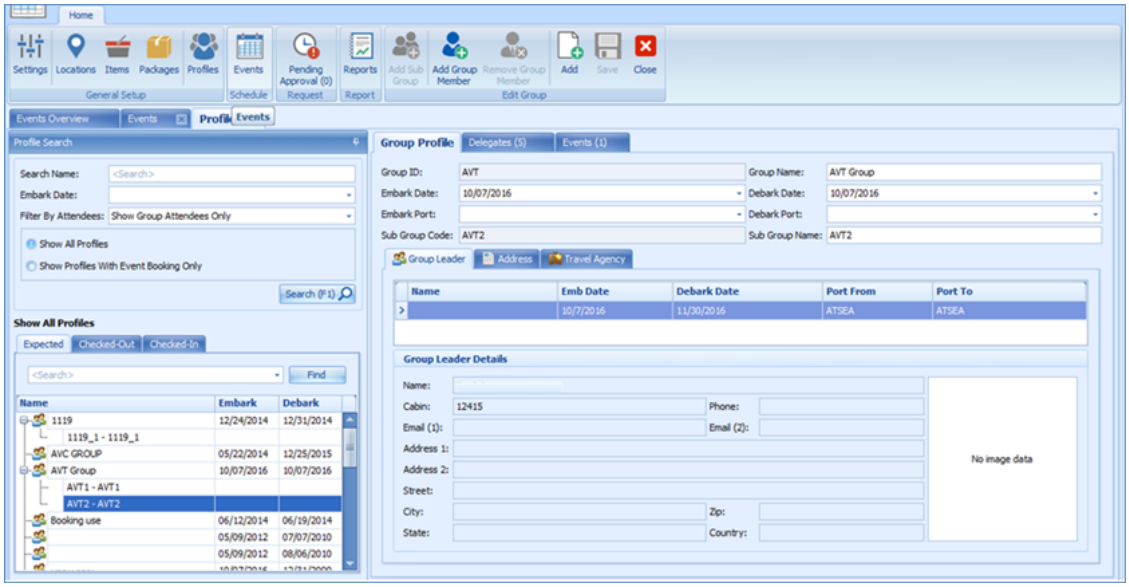
Searching a Package

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

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Profiles Setup

Figure 3-18 Event Profile



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

Group Profiles

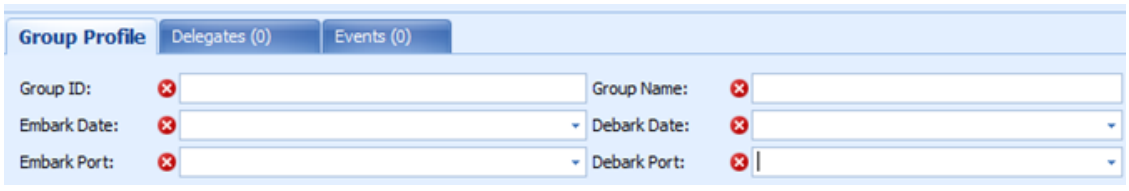
The Main Group acts as a parent profile that holds the sub-group and group members for the event. You cannot delete this profile. A sub-group profile is used to manage multiple events from the same group and can have as many sub-groups within the date range of the Main Group

Adding Group Profiles

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

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

Figure 3-19 Group Profile Tab



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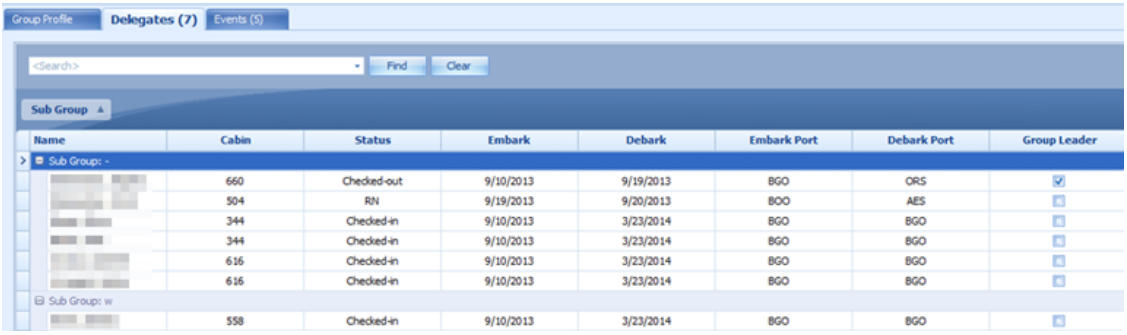
Table 3-6 Field Definition of Group Profiles Tab

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

Delegates

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

Figure 3-20 Event Delegates Tab



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

Events

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

Editing Main Group Profile

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

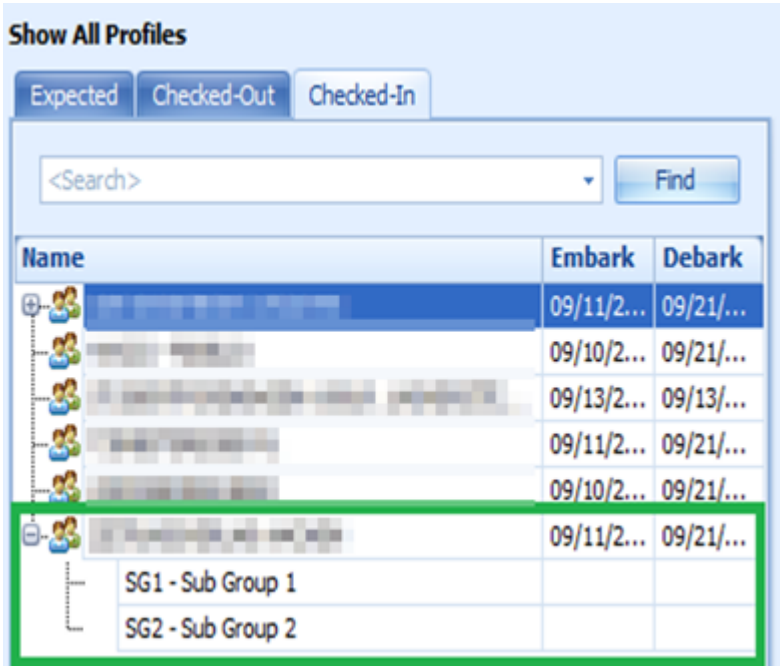
Adding a Sub-Group

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

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

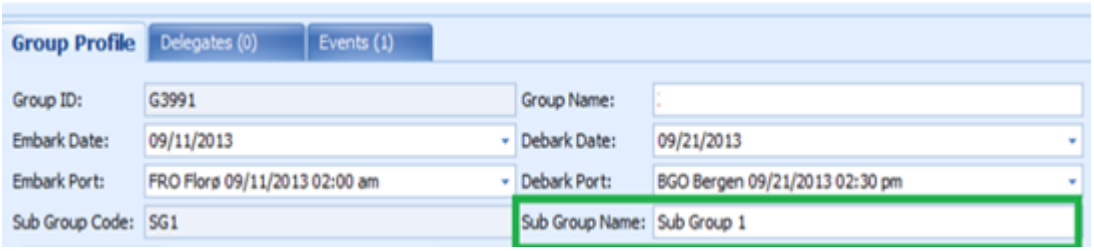
Figure 3-21 Sub Group Profiles



Editing Sub-Group

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

Figure 3-22 Sub Group Name



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

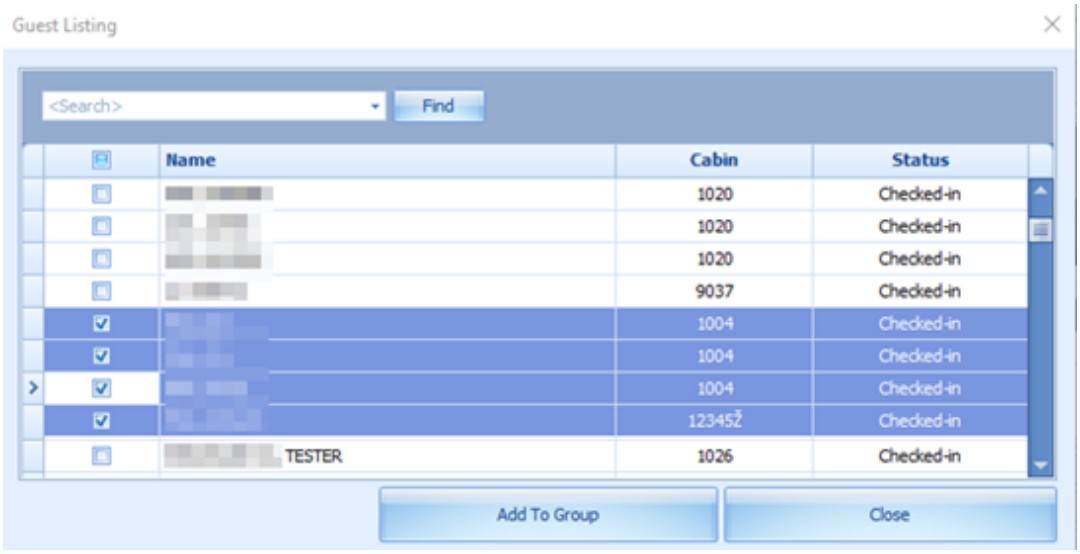
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Adding Group Delegate

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

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

Figure 3-23 Group Delegate List



3. In the Guest Listing window, select the guest using the checkbox besides the guest name or use the search function to search for the name, and matching results returned are highlighted in yellow. Click **Add To Group**. The new group member name(s) appear in the Delegates tab.
4. Adding multiple delegates to an event is allowed. If you are adding a guest that belongs to another group, the system prompts a reassignment warning. Click **Yes** to confirm the reassignment.

Removing Group Delegate

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

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

Report Setup

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

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

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4

Shore Excursion

The Shore Excursion module enables you to set up excursion and package offerings for cruise passengers. It eases booking and ticket printing for excursions when passengers come onboard or go ashore.

Financial Code Setup

There are two different approaches in using the Value-Added Tax (VAT) handling in the Excursion module and in both approaches, it is an inclusive VAT in the price, *not* an add-on VAT.

With the VAT Posting Split that caters up to four split %, and the amount of the tour price is posted as a VAT inclusive sum, this is not reflected anywhere on the application. You can extract these splits onto a report.

Using the VAT Posting Split, the excursion price can be broken down into components with the different price splits and tax rates.

VAT Tax Class

A VAT Tax Class is a tax classification used to identify the type of tax associated with the posting code.

To create,

1. Log in to the **Administration** module.
2. Select **Financial Setup** from the drop-down menu and **VAT Tax Class**.
3. Right-click and select **Add New**.
4. Enter the short code and the Tax Class name, for example, Reduced Tax in the Description field, and click **Apply** to save.

VAT Tax Rate

1. From the Financial Setup, select **VAT Tax Rate**.
2. Expand the tree view of the country listed and select the **Tax Class**.
3. Associate the correct VAT Tax Posting Department to the code.
4. Click **Apply** to save.

Posting Department

1. Navigate to **Financial Setup, Department Codes¸ Debit** and create a sub-department for each of the tax classes, if none are available.
2. At the Type of Posting of Debit Department Code Setup form, select **DX Tax Department** from the drop-down list.
3. Click **OK** to save.

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4. Navigate to the Department code for Excursion postings. Select the sub-department code that has tax and click **Edit**.
5. At the **Department VAT Tax** field, assign the **VAT Tax Class** to each of the different excursion sub-departments.
6. Click **OK** to save.

Bookable Tours

In the Setup menu of the Shore Excursion, configurations such as Parameters, Vendors, Language Module, Ticket Language Template Setup, Bookable Templates Setup, Bookable Tours Setup, Packages Setup, Tour Transportation Sharing, Tour Categories, Package Combination Types, Tour Reporting Categories, Tour Reporting Tags, Tour Reporting Difficulty Levels, Tour Transfer Locations, Tour Cost Item Types are defined.

You can set up the type of tours available per cruise and the criteria for each tour by cruise day with these functions. It is advisable that you create a Tour Template for repetitive tours. Before you set up a Bookable Tour and when creating a template, ensure you have all the Financial Posting codes available.

Setting up Tour Codes

Before you set up the Tour Templates for bookings, the system Tour codes listed in the *Tour Code and Description* table below are required, depending on the Ship's operations.

Table 4-1 Tour Code and Description

Tour Code	Description
Tour Transportation Sharing	Link bookable tours that share the same transportation.
Tour Categories	Tour category that every tour is assigned.
Package Combination Types	Link Package Tours to provide multiple tour choices from the booked package.
Tour Reporting Categories	Group of tour category.
Tour Reporting Tags	Tag used for reporting.
Tour Reporting Difficulty Levels	The difficulty level of the tour are: easy, moderate, or difficult.
Tour Transfer Locations	The pick-up location for the Transfer Tours.

Once configured, they are available for selection in **Template Setup and Bookable Tours Setup**.

To configure the codes,

1. Select the option from the **Setup** menu.
2. Right-click to select **Add New**.
3. Key in the Description code and name and additional information in the details section.
4. Click **Apply** to save the code.
5. To remove, right-click on the code and select **Remove**.

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Vendors

The Vendors Setup is used to store contact details of vendors fulfilling the ground arrangements, supplying equipment or other services for the tours.

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

Language Module Setup

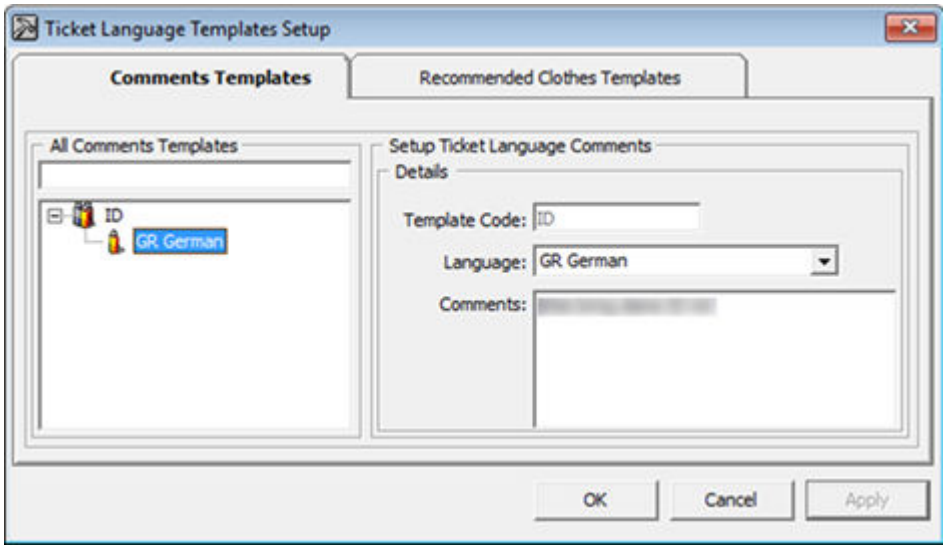
The Language Module Setup activates with the **Use Language Module** parameter, which allows you to link and print on tickets the template comments or tour requirements in other languages. This function works with **Use Free Text Tour Comments/Recommended Clothes** parameter set to "1". This setting also changes the window layout in **General tab, Tour Template Setup**, and **Bookable Tours Setup** to only display or print information in other languages, provided the setup has **Tour Languages** defined in the **Linking** tab.

1. From the Setup menu, select **Language Module Setup**.
2. Select the **Default Language** and select the **Activate Language Module**.
3. Click **OK** to confirm and close the window.

Ticket Language Template Setup

The Ticket Language Template Setup allows you to create comment templates and the recommended clothing templates used in Shore Excursion in different languages. This function only works when the Language Module Setup is activated. Once enabled and if no language is selected during booking, the system will use the default language.

Figure 4-1 Ticket Language Templates Setup



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1. From the Setup menu, select **Ticket Language Template Setup**.
2. Select either the **Comments Templates** or the **Recommended Clothes Templates tab**.
3. Right-click and select **Add Template**.
4. At the Code field, enter the code ID and comments, and click **Apply**.
5. Right-click the newly created code and select **Add Language**.
6. At the form, select the **Language** from the drop-down list and enter the comments and click **Apply**.

Tour Templates

A Tour Template enables you to create a base for recurring tours instead of creating the tour individually.

Tour Templates Tabs and Descriptions

Figure 4-2 Tour Templates General Tab

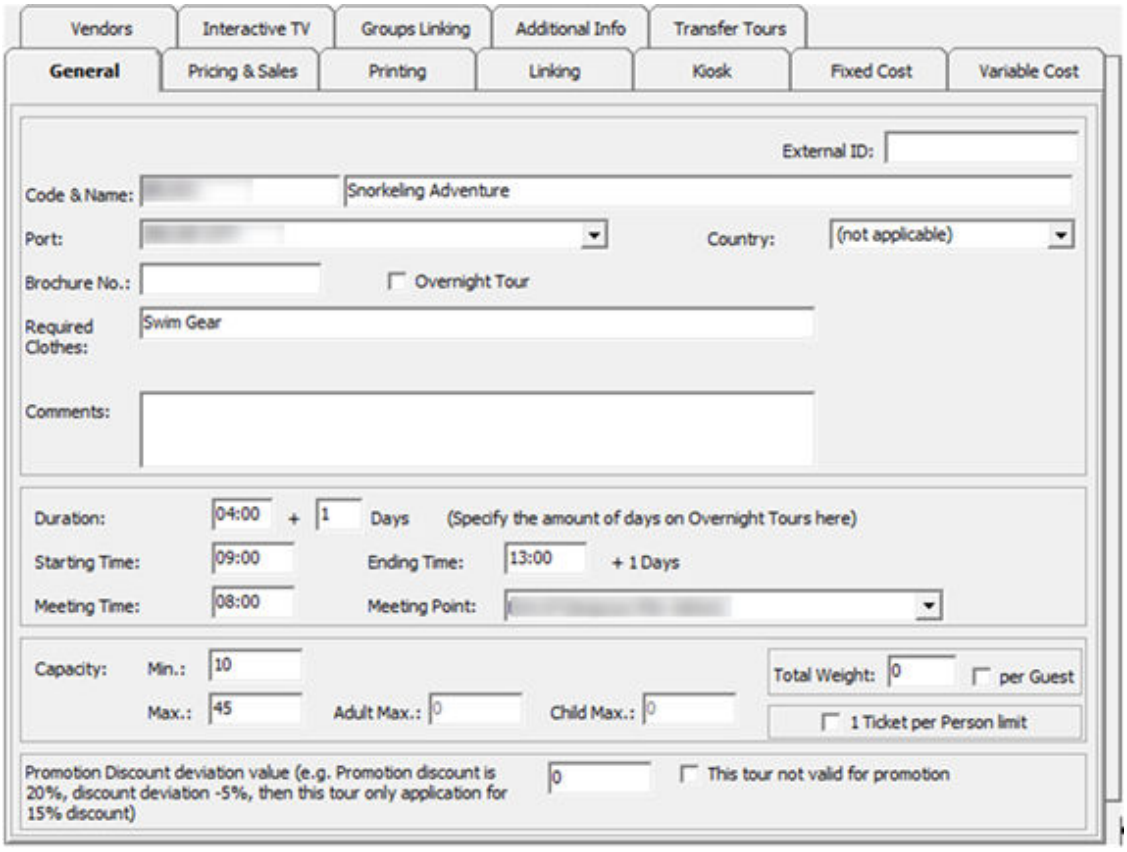


Table 4-2 Field Description of Tour Templates General Tab

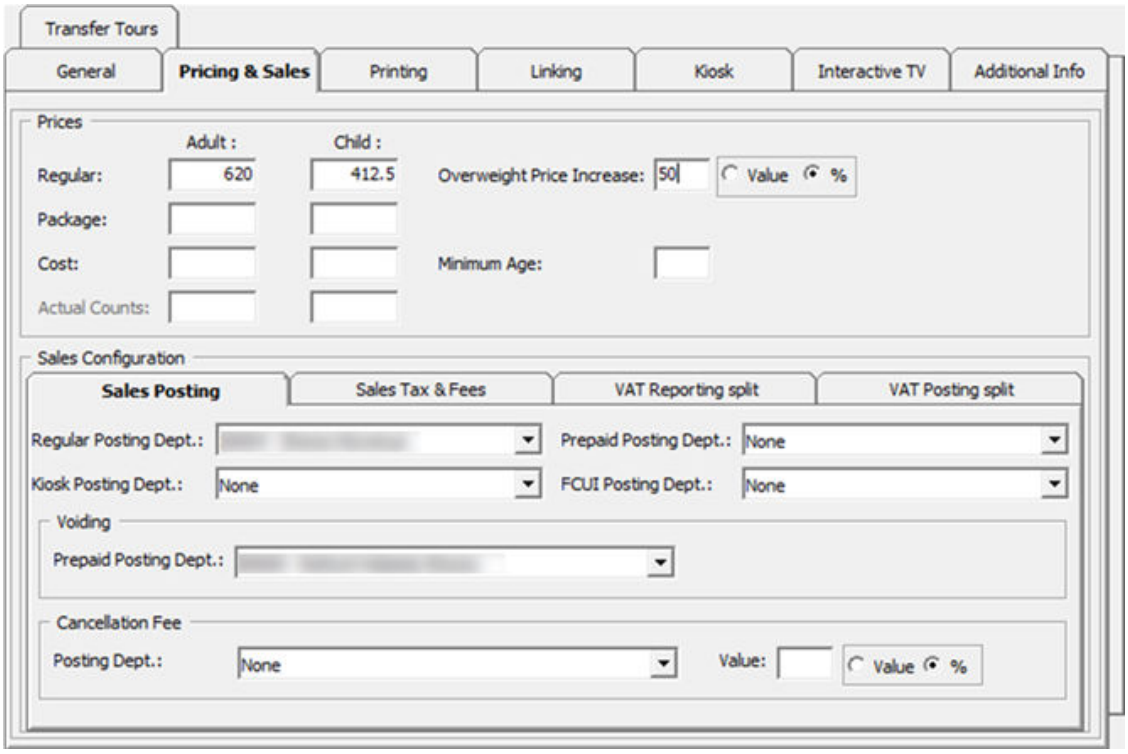
Field Name	Description
External ID	External ID.
Code & Name	Short Code and Name of the tour.

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Table 4-2 (Cont.) Field Description of Tour Templates General Tab

Field Name	Description
Port	Port of the tour, selectable from the drop-down menu.
Country	Country of the tour, selectable from the drop-down menu.
Brochure No.	Brochure Number in the cruise catalog number.
Overnight Tour	Sets the tour as an overnight tour when selected.
Required Clothes/ Comments	Additional information to be printed on tour ticket.
Duration & Times	Duration of the tour, Starting/Ending Time/ Meeting Time and Meeting Point of the tour.
Capacity	Max/ Min seat capacity of the tour.
Adult/ Child Max	Max seat capacity for an adult/ child of the tour.
Total Weight	Max total weight allowed for the tour.
Total Weight per guest	Sets the max weight per guest allowed for the tour when selected.
1 Ticket per person limit	Sets the purchase to allow one ticket per person after selected.
Promotion discount deviation value	Discounts deviation value for the tour.
This tour not valid for promotion	Disables the tour from promotional sale when selected.

Figure 4-3 Tour Template Pricing and Sales Tab

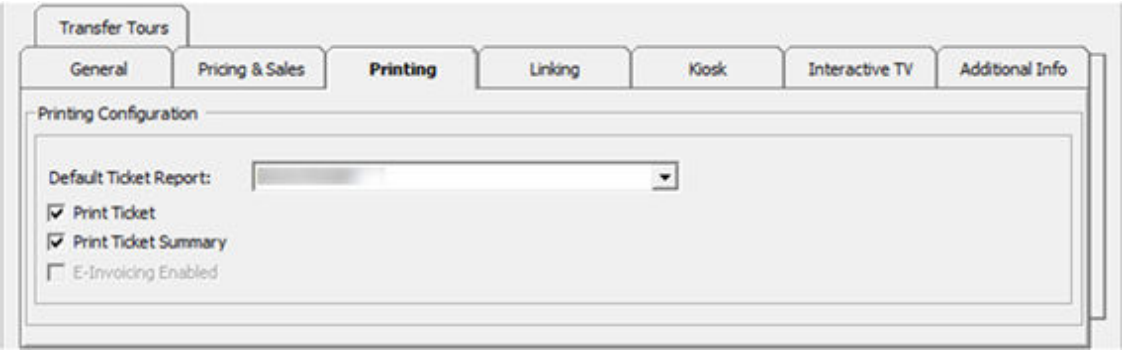


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Table 4-3 Field Description of Tour Templates Pricing and Sales Tab

Field Name	Description
Regular Adult/Child Price	Tour selling price for an adult/ child.
Package Adult/Child Price	Tour package selling price for an adult/ child.
Cost Adult/Child	Tour costs for the adult/ child. Cost prices text boxes are disabled in order to display-only. This field gets updated automatically when adding a new booking or voiding an existing one based on the variable cost applied.
Actual Counts Adult/ Child	Actual Tour counts for an adult/ child for the tour.
Overweight Price Increase	Value or percent to increase if overweight occurs.
Minimum Age	The minimum age allowed for the tour.
Posting Departments	Reference to Financial Setup, Department Code setup.
Voiding Departments	Reference to Financial Setup, Department Code setup.
Cancellation Department & value	Cancellation fee definable in value or percentage. Reference to Financial Setup, Department Code setup for posting code.
Sales Tax & Fees	Sales Tax & Fees Tab: • Sales Tax definable in value or percentage. • Additional Fees definable in value or percentage. Reference to Financial Setup, Department Code setup for posting code.
VAT Reporting Split	VAT Reporting Split Tab: For reporting purposes. Use of different VAT percentages resulting from the selling of excursion in order to produce a report where the respective VAT classes. The four type of VAT categories are user definable. You can change the label name from Administration module, System Setup, Label Setup.
VAT Posting Split	VAT rate in percentage or price used for posting.

Figure 4-4 Tour Template Printing Tab



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Table 4-4 Field Description of Tour Templates Printing Tab

Field Name	Description
Default Ticket Report	Default ticket report used for ticket printing for the tour, selectable from the drop-down menu.
Print Ticket & Ticket Summary	After selected, ticket and ticket summary are printed upon posting of the tour.

Figure 4-5 Tour Template Linking Tab

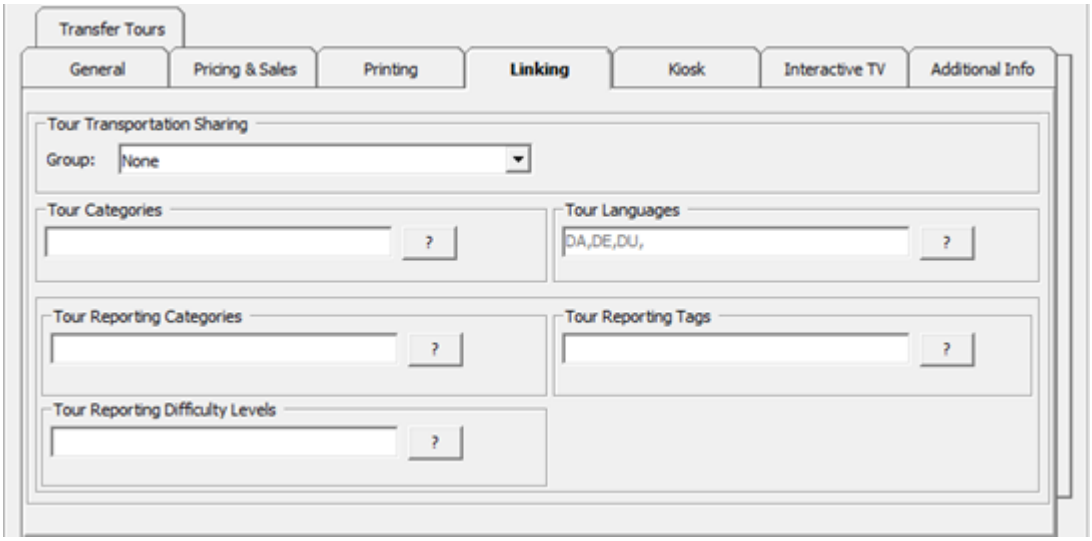


Table 4-5 Field Description of Tour Template Linking Tab

Field Name	Description
Tour Transportation Sharing	Link tour transportation sharing for the tour, selectable from the drop-down menu. In Bookings window, all the bookable tours boxes have the tour transportation sharing code with the yellow background.
Tour Categories & Languages	Link tour categories and languages for the tour, selectable from the drop-down menu. See Language Module Setup and Ticket Language Template Setup for more information
Tour Reporting Categories, Tags & Difficulty levels	Link tour reporting categories, tags, and difficulty levels for the tour, selectable from the drop-down menu.

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Figure 4-6 Tour Templates Kiosk Tab

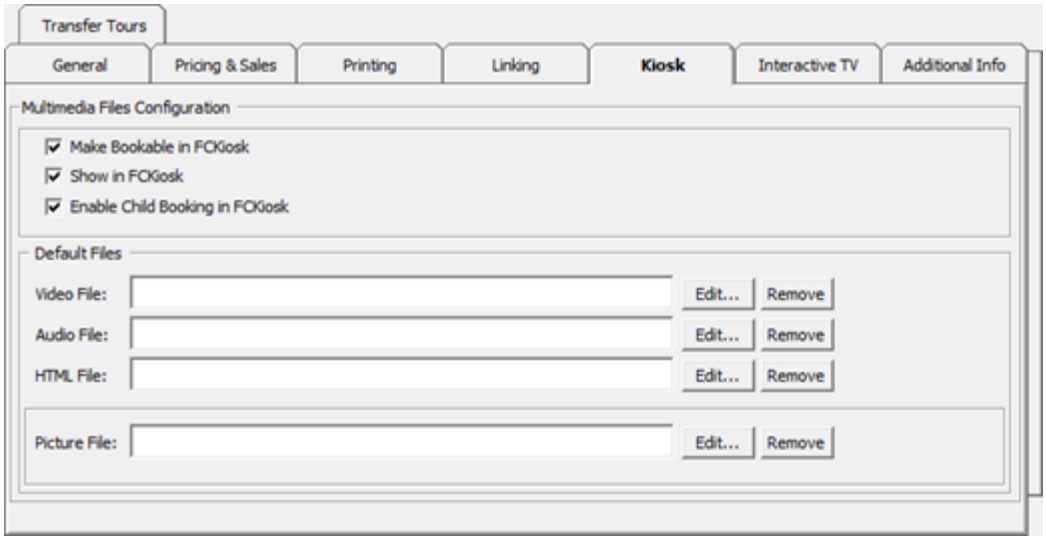
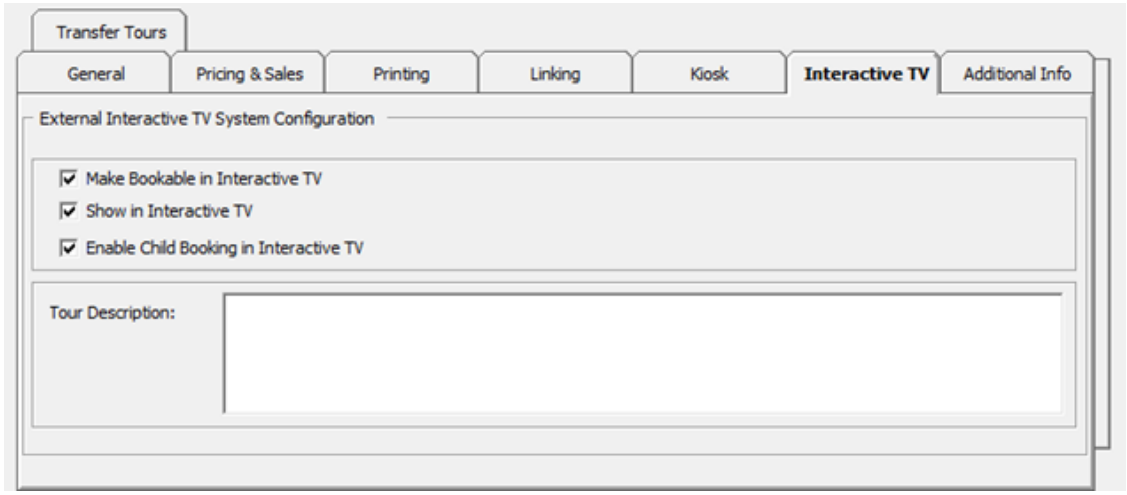


Table 4-6 Field Description of Tour Templates Kiosk Tab

Field Name	Description
Make Bookable in Kiosk.	Sets this tour as available for booking by using the Kiosk
Show in Kiosk	Sets this tour as visible in the Kiosk.
Enable Child Booking in Kiosk	Sets this tour as available for child booking by using the Kiosk.

Figure 4-7 Tour Templates Interactive TV



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Table 4-7 Field Description of Tour Templates Interactive TV

Field Name	Description
Make Bookable in Interactive TV.	Sets this tour as bookable in Interactive TV.
Show in Interactive TV.	Sets this tour visible in Interactive TV.
Enable Child Booking in Interactive TV.	Sets this tour available for child booking in Interactive TV.
Tour Description	Additional details for the tour. The "custom comment" is user definable in Administration module, System Setup, Label Setup.

Figure 4-8 Tour Templates Transfer Tours

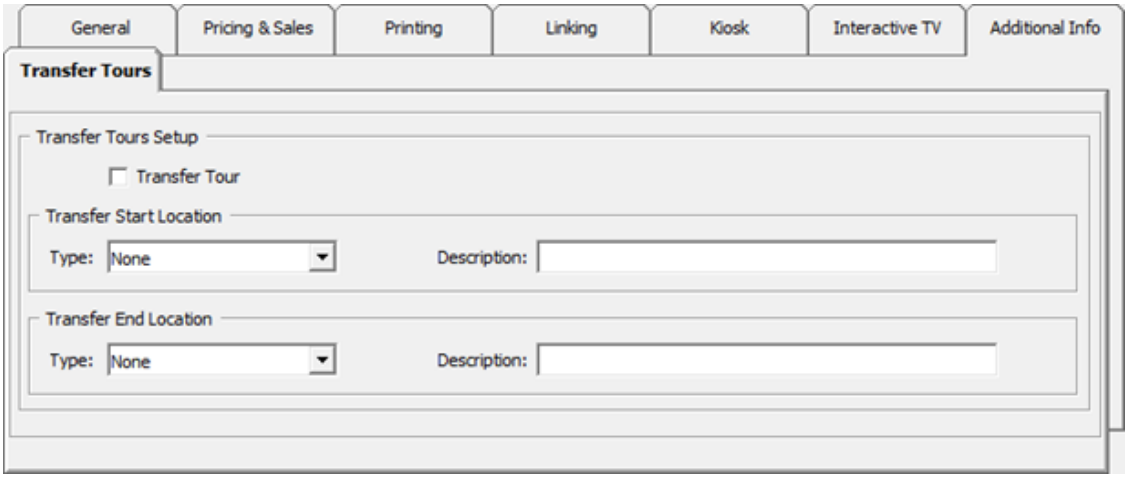


Table 4-8 Field Description of Tour Templates Transfer Tours

Field Name	Description
Transfer Tours	Select the checkbox to mark the tour as a transfer tour.
Transfer Start Location	The start location of the tour.
Transfer End Location	The end location of the tour.

1. Select **Transfer Tour** if the tour is a transferred tour.
2. Select **Transfer Start Location** type, for example, Airport, Hotel, Train station.
3. Enter Transfer start location description.
4. Select **Transfer End Location** type and enter the description.

Setting up Tour Templates

A Tour Template enables you to create a base for recurring tours instead of creating the tour individually.

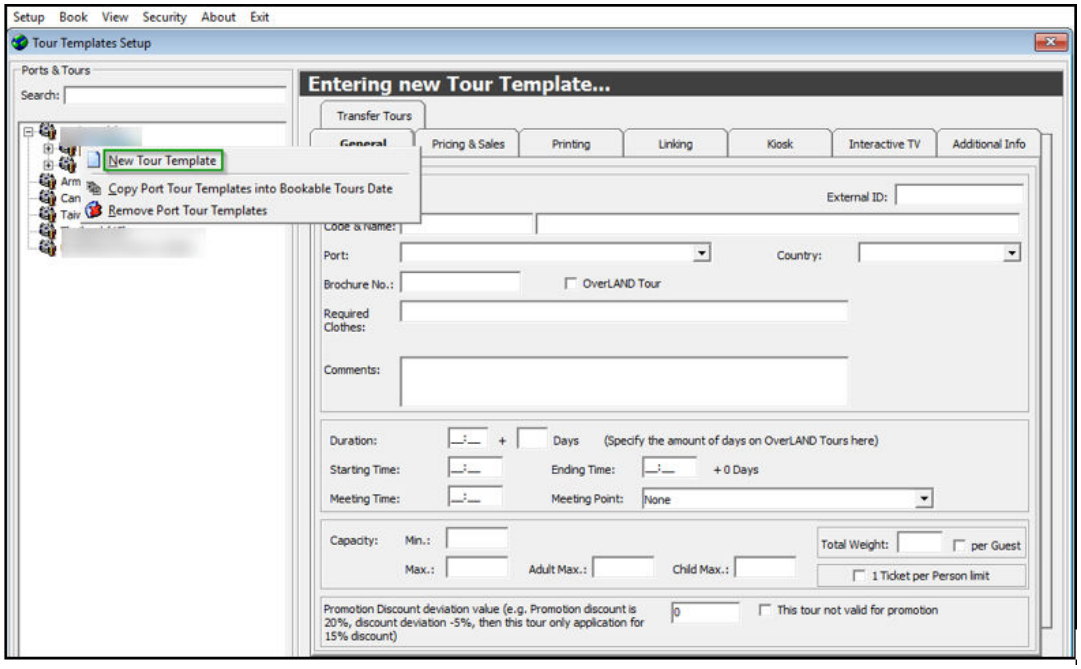
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In addition to the General, Pricing & Sales, Printing, Linking, Kiosk, Interactive TV and **Additional Info**, tabs such as Fixed Cost Variable, Vendors and Group Linking are visible after you return to the template.

New Tour Template

1. From the Setup menu, select **Tour Template Setup**.
2. Expand the **Country** tree view and select the country the template resides. These are grouped by the field selection in **General Tab, Port or Country**.
3. Right-click and select **New Tour Template**.

Figure 4-9 Tour Templates Setup



4. At Tour Template window, in the respective tabs, insert all the relevant information such as price, meeting time, location, weight, clothing, equipment requirement, and transport arrangements. See Table 4-2 for a description of the available fields.
5. Click **Apply** to save the template and close the form.

Fixed Cost Tab

This tab defines the cost price per excursion, regardless of the number of attendees.

1. Click the **Add** button to open the Fixed Code Configuration window.
2. Select the **Item Type**, which references the Tour Cost Item Types.
3. Select the **Vendor**. See Vendors in Bookable Tours.
4. Enter the **Price** and **Quantity.**
5. The Total auto populates based on the price and quantity defined.
6. You can edit or remove the Fixed Cost.

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Variable Cost Tab

The Variable Cost tab allows you to specify the number of attendees with a corresponding price. For example:

Range 20

Adult Cost Price $80

Child Cost Price $50

Range 40

Adult Cost Price $70

Child Cost Price $40

With the above setting, the tour prices for up to 20 attendees is at $80 and $50 respectively. The price reduces when it reaches the 21 to 40 range.

1. Click the **Add** button to open the Variable Code Configuration window.
2. Enter the Range, Adult Cost and Child Cost.
3. You can edit or remove the Variable Cost.
4. The cost reflects in the **Cost** field of **Bookable Tour Setup.** The price is adjusts when the booking reaches the range defined.

Vendors Tab

To add a vendor, select a vendor from the drop-down list and then click **Add Vendor**. To remove the vendor, select the vendor from the grid and click the **Remove Vendor**. See Vendors for more information.

Group Linking Tab

The group linking tab links certain excursion to a particular group. For example, Tour A is linked to Group A. Tour B is linked to Group B. When Guest 01 from Group A makes a booking, only Tour A is shown.

To link a group, select the group account created in **Management module, Group** handling and then click **Add Group**.

Setting up Tour Template with VAT Split

The VAT Tax Split feature enables different tour elements to have different VAT Tax assignments.

In the following example, we assume the tour is priced at $620 and it includes three elements with different VAT Tax and pricing:

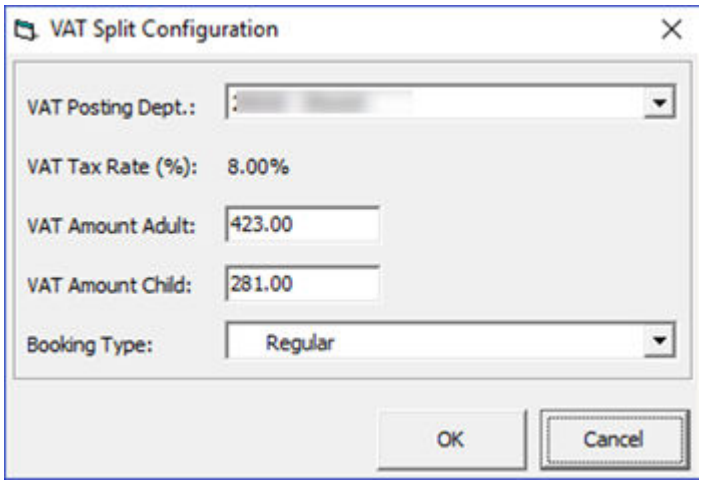
Table 4-9 Example of Price and VAT Breakdown

Item	Cost	VAT%
Excursion	$423	8%
Food	$81	25%
Guiding	$116	0

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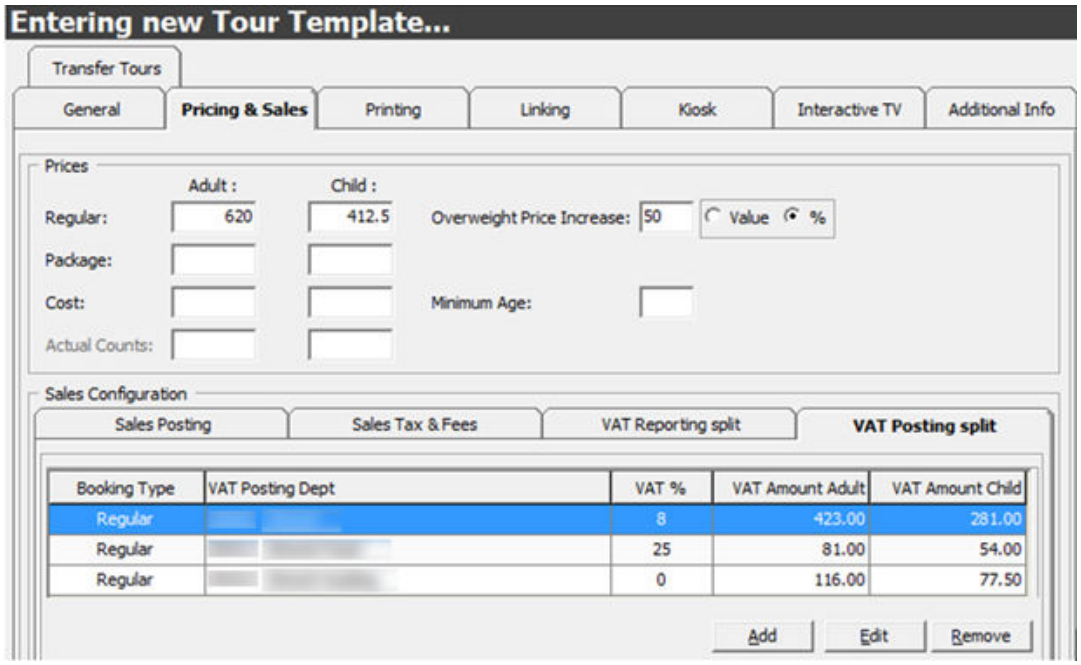
1. At the **Financial Setup** window, create the **Department Code** and associate the corresponding **VAT Tax Class**.
2. At the **Tour Template Setup**, navigate to **Pricing & Sales**, **VAT Posting Split** tab.
3. Click **Add** to add the **VAT Department**.
4. At the **VAT Split Configuration** window, select the **Posting Department** from the drop-down list, enter the **Amount for Adult/Child** and select the **Booking Type**.

Figure 4-10 VAT Split Configuration Window



5. Click **OK** to save and repeat the steps above for the other elements.

Figure 4-11 VAT Posting Split in Pricing and Sales



6. When copying the template from Port Tour Template into Bookable Tours Date or Tour Template into Bookable Tour, it copies the VAT Posting Split setup to the selected port

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date. The same applies when copying using Copy Date Bookable Tours into another Date in Bookable Tours Setup.

The formula to calculate the VAT Posting Split is: Total - round (Total / (1+VAT_RATE)/100).

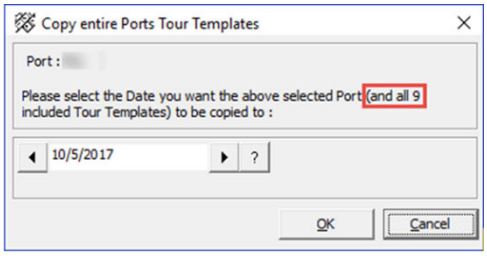
Copying Port Tour Templates into Bookable Tours Date

Once the Tour Template is available, you can copy the templates into Bookable Date individually or by batch. Upon clicking the **Apply** button to save the new Tour Template, the additional setting will be visible. See Tour Templates.

Copy Template by Batch

1. At the Tour Templates Setup, expand the tree view and select the port. The total number of templates linked to the port is shown in a bracket ( ).
2. Right-click and select **Copy Port Tour Templates into Bookable Tours Date**.
3. At the Copy entire Ports Tour Templates window, select the desired **date** using the date editor.

Figure 4-12 Copy Port Tours Templates



4. Do note the number of templates to copy over before proceeding. Click **OK** to confirm or **Cancel** to abort.

Copy Template Individually

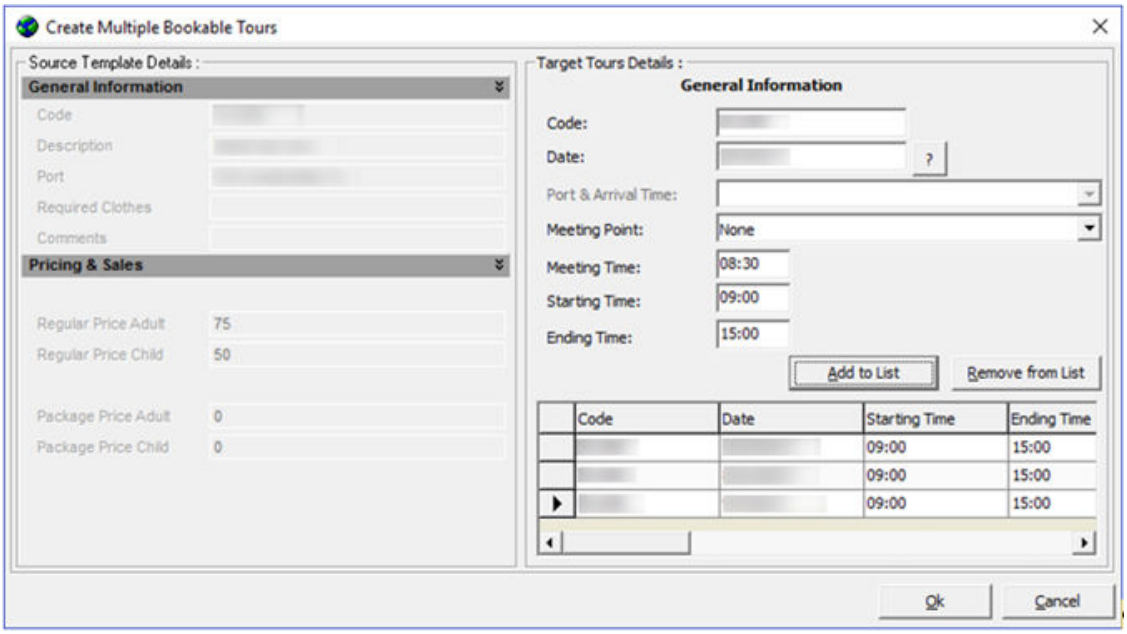
1. At the Tour Templates Setup window, expand the tree view until you see the template name or codes.
2. Right-click and select **Copy Tour Templates into Bookable Tours Date**.
3. At the Copy selected Tour Template window, select the desired date using the date editor.
4. Click **OK** to proceed or **Cancel** to abort.

Create Multiple Bookable Tours

The Create Multiple Bookable Tours enables you to create a tour from a single template across multiple dates.

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Figure 4-13 Create Multiple Bookable Tours



1. Repeat step 1 of Copy Template Individually.
2. Right-click and select **Create Multiple Bookable Tours**.
3. At the **Target Tour Details** section, select a date and click **Add to List**.
4. Repeat until you have all the dates.
5. Click **OK** to confirm.

Removing Port Tour Templates

When a Port Tour template(s) is no longer needed, you can remove a single template or all from a port using the **Remove Port Tour Templates** or **Remove Tour Templates**, depending on the selection at the tree view.

1. At the Tour Templates Setup window, expand the tree view.
2. Right-click on the selected Port and select **Remove Port Tour Templates** or further expand the tree view to select a template.
3. At the Remove selected Port window, click **OK** to confirm or **Cancel** to abort.

Package Setup

New Package

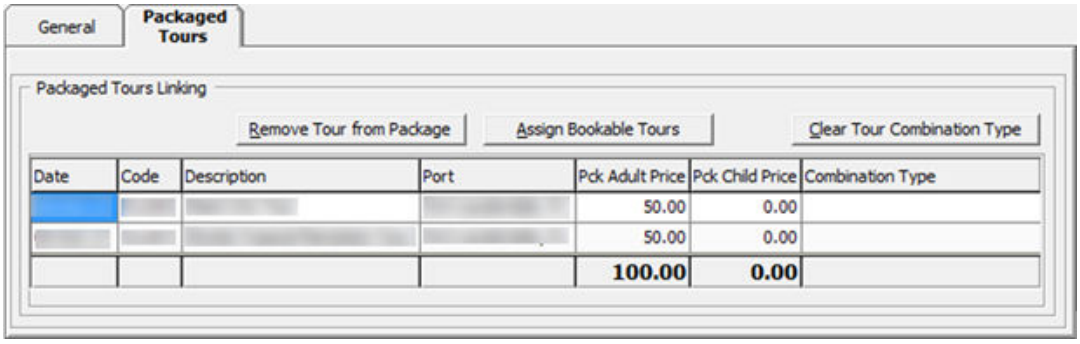
You can create a bookable package using the available tours for the cruise.

1. Select **Packages Setup** from the Setup menu.
2. At the System Cruises & Packages panel, right-click and select **New Package**.
3. Select a cruise from the **Cruise** drop-down list.
4. Select **Last Sales Date.**
5. Enter the **Package code** and name in the **Code & Name** field.

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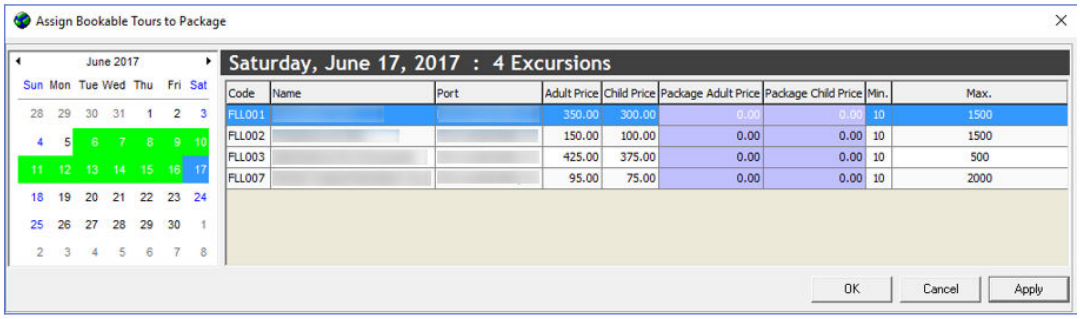
6. Select a port from the **Port** drop-down list.
7. Enter the **Brochure No, Comments**, and select the respective checkboxes under Comments.
8. Click **Apply** to enable the Packages Tours tab.
9. For the Link to Package Combination Type, the package tours shown in the Combination Type column are the combined package.

Figure 4-14 Package Tours Link



10. Navigate to the tab and click **Assign Bookable Tours** to assign the bookable tours.

Figure 4-15 Assign Bookable Tours to Package



11. Select the date and tour to assign.
12. Click **Apply** and select another tour to add to the package.
13. Click **OK** to return to the previous window.
14. Define the price per adult/child in the grid.

Remove Cruise Packages

You can remove a cruise package that you no longer need by right-clicking the package name and select **Remove Cruise Package**. However, you cannot remove it if the package has a booking linked.

Setting up Bookable Tours

Once a Tour Template is available, you can make these tours available for booking by date. You can also create an ad-hoc tour from this function.

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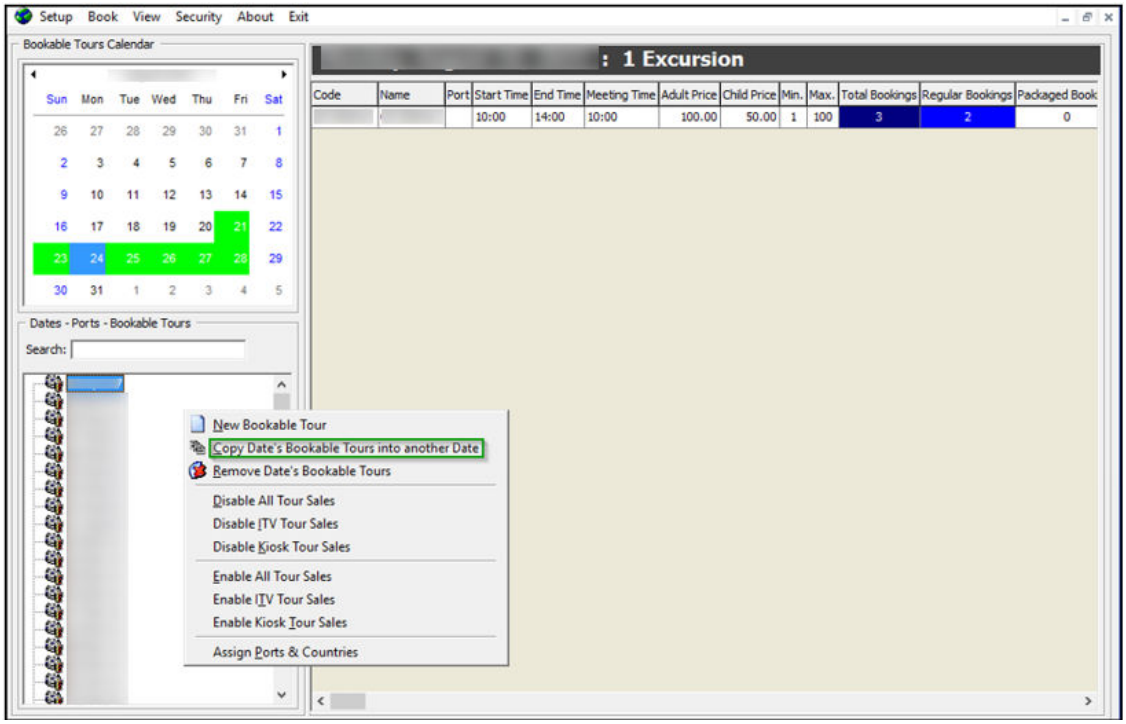
Adding new Bookable Tour

1. From the Setup menu, select **Bookable Tours Setup**.
2. At the Bookable Tours Date editor, right-click the desired date and select **New Bookable Tour**.
3. Fill in all the required the details of the tour in each of the tabs.
4. Click **Apply** to save.

Copy Bookable Tour to another Date

Instead of creating a tour from scratch, you can copy the same Bookable Tour information into another date with this function.

Figure 4-16 Copy Bookable Date to another Date



1. At the Date editor, select the **date to copy** in the tour from.
2. Right-click and select the **Copy Date's Bookable Tours into another Date** option.
3. At the Copy Entire Bookable Tours Date window, select a new **date** to copy to.
4. Click **OK** to proceed. Note that only the non-existing tours are copied.

Remove Date's Bookable Tours

This function removes all tours on the selected date. You cannot remove a tour if it has booking attached.

1. At the Date editor, select the desired date and right-click to select **Remove Date's Bookable Tours**. This removes all bookable tours from the date, except tours that are booked.

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2. At the Remove current Bookable Tours Date window, click **OK** to proceed or **Cancel** to abort.
3. Alternatively, you can remove the individual tour by expanding the tree view and select the tour to remove.
4. Right-click and select the **Remove Bookable Tour** option and then click **OK**.

Disable All Tour Sales, ITV Tour Sales and Kiosk Sales

The Disable All Tour Sales, ITV Sales and Kiosk Sales options disable all tours for the selected date and hide them from the booking window.

1. At the Date editor, select the desired **date** and right-click to select **Disable All Tour Sales**.
2. At the Disable All Sales for Selected Bookable Tours Date window, click **OK** to proceed or **Cancel** to abort.
3. To enable the tours at a later stage, repeat step 1 and select **Enable All Tour Sales** instead.
4. Repeat the above steps to enable or disable the tour sales from ITV or Kiosk.

Assign Ports and Countries

This function allows you to assign port and country to tours.

1. Select the desired date from the **Date editor**, and right-click to select **Assign Ports & Countries**.
2. At the Assign Ports & Countries window, select the **Port and Country** from the drop-down list.
3. Click **OK** to proceed or **Cancel** to abort.

Excursion Booking

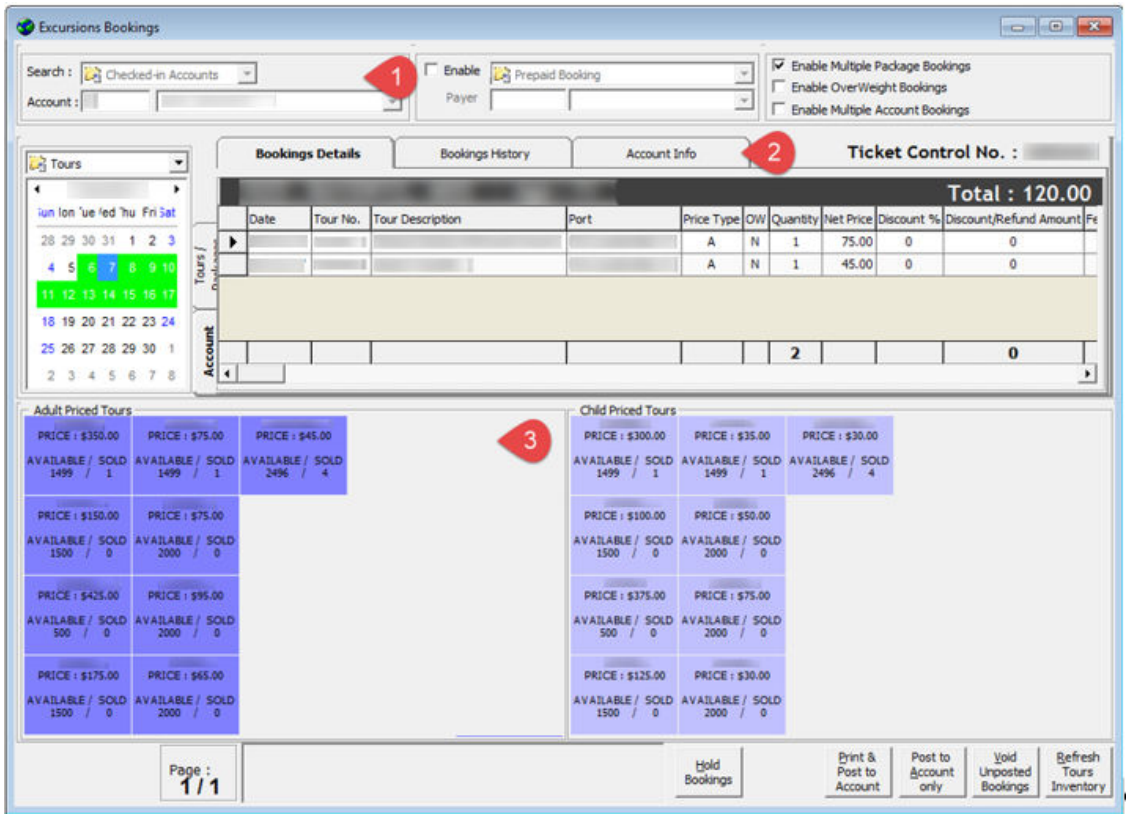
The Book menu contains three booking functions; a Book, Quick Bookings, and Unposted Bookings.

Bookings

The Booking functionality provides an overview of available tours by date, price, and tour information. It shows information of the selected account and booking history, if any. The available tours are shown in a menu pane by Adult/Child Price for the selected date.

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Figure 4-17 Excursions Bookings Window



The Booking Window has three sections:

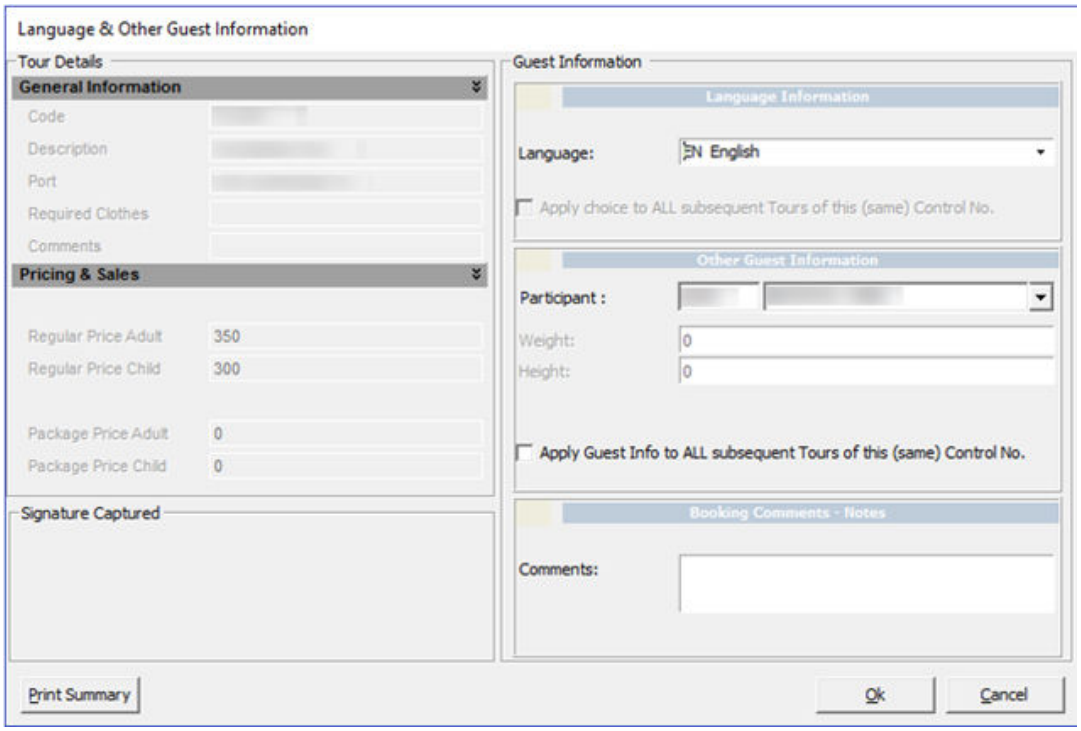
1. Account Search.
2. Booking details, including Booking History and Account Info.
3. Available Tour Code and Prices.

Adding a Booking

1. At the **Account Search** section, swipe/tab the board card though an MSR or RFID device or manually search for the cabin number or name, and select the guest name from the result list.
2. Above the Date editor, select the type of tour and select the booking date.
3. Available tours are shown in the **Adult/Child Price Tours** panel and placing the mouse over the tour code displays the tour information. Select the desired tour by clicking on the tour code.
4. If the **Use Language Module** parameter is enabled, the system prompts a Language & Other Guest Information window for you to select a language. Select **Apply choice to ALL subsequent Tours of this (same) Control No** if the same selection is to be applied to multiple bookings.

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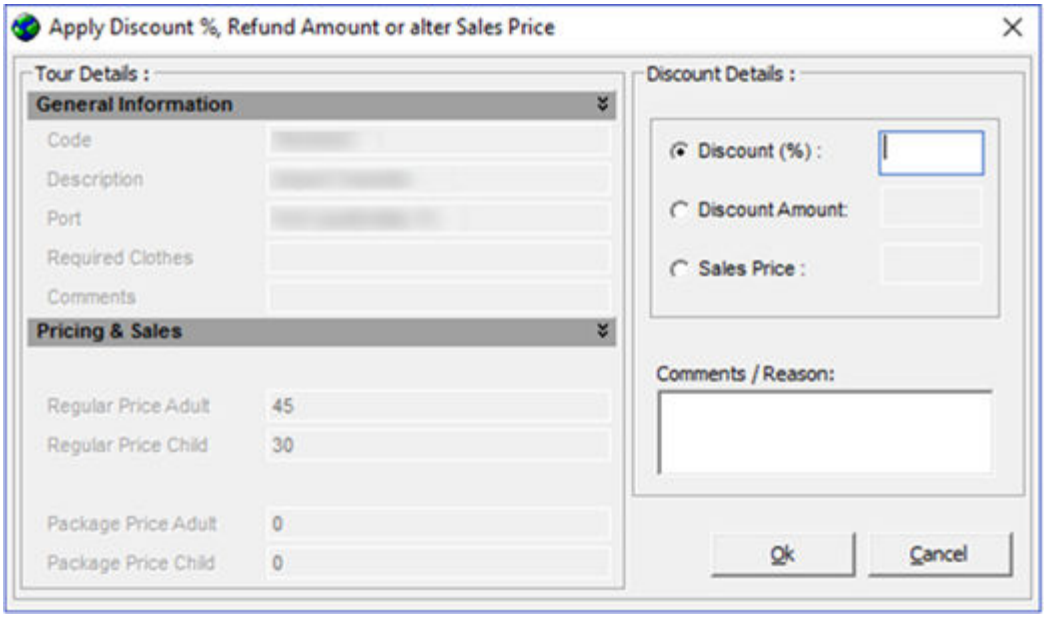
Figure 4-18 Language and Other Guest Information Window



5. Similarly, the **Weight & Height** fields are enabled if the tour has Weight limit defined. If the entered weight value exceeds the defined weight limit, an extra charge is imposed per item defined in the bookable tour.
6. Click **OK** at the Language & Other Guest Information window. This adds the selected tour to the Booking Details tab.
7. Click on the same tour to increase the quantity or select another tour code to add to the booking.
8. If the booking is entitled to a discount, right-click on the booking at the Booking Details grid and select **Apply Discount**. Multiple selections are allowed.

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Figure 4-19 Discount, Refund and Alter Sales Price



9. At the **Discount Details** section, select the type of discount and then enter the value in the field.
10. Enter a comment or reason for the discount and click **OK** to save.
11. Complete the booking by selecting one of the following options:
    - **Hold Bookings:** Places the booking on hold.
    - **Print & Post to Account:** Posts the booking and print the ticket and summary.
    - **Post to Account only:** Posts the booking without printing the ticket.
    - **Void Unposted Bookings:** Removes all unposted bookings from the grid.
    - **Refresh Tours Inventory:** Refreshes the booking counts for all tours on the page.

To add more than one tour before completing the booking, repeat the above from step 2. The tour will be added to the booking list. Click the **Post** button, to complete the booking after it is confirmed.

Edit Booking Information

This option enables you to alter the booking information such as a discount and language.

1. At the **Booking Details** tab, select one or multiple bookings from the grid.
2. Right-click and select one of the options.
    - **Apply Discount:** Applies a discount in percentage, value, or a fixed sales price for the selected booking.
    - **Remove Discount:** Removes the discount applied on selected booking.
    - **Void:** Removes the selected booking from being posted.
    - **Edit Info:** Updates language and other information on the selected booking.

Multiple Account Bookings

You can book the same tour for a group of guests using the by selecting the **Enable Multiple Account Bookings** checkbox and the below steps.

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1. Repeat step 1 to 10 in the Adding a Booking section.
2. Select **Post to Account only** or **Print & Post to Account**.
3. In the Multiple Accounts Selection window, select the **Status, Account Type** and **Pre-Selection** from the drop-down list.
4. Search for name/cabin, click **Add All>, Add>** or **Criteria Add>** to add the accounts into the booking and click **OK**.
5. At the confirmation prompt, click **OK** to confirm posting or **Cancel** to abort.

Route Booking

A route booking is a booking paid by another person. This function is enabled when you select the **Enable** checkbox and the **Routed Booking** checkbox.

After the Routed Booking is enabled, repeat steps 1 to 11 in the Adding a Booking section to book.

Upon completing the booking, the buyer shown is the selected guest who made the booking, whereas the booking charges are posted to the routed account.

Prepaid Booking

The booking is marked as prepaid and paid through the system account. This function is enabled when you select **Enable** checkbox and the **Prepaid Booking** checkbox.

After the Prepaid Booking is enabled, repeat steps 1 to 11 in the Adding a Booking section to book.

Upon completing the booking, the booking is marked as **Prepaid** booking and posted to the selected account.

Package Booking

1. At the Account Search section, swipe/tab the board card though an MSR or RFID device or manually search for the cabin number or name, and then select the guest name from the result list.
2. Above the Date editor, select the type of **package** followed by the **date**.
3. Available packages are shown in the **Adult/Child Price Tours** panel.
4. Select the desired package by clicking on the package code. The Linked Tours by Groups is prompted if the package is linked to a Package Combination Type.
5. If the **Use Language Module** parameter is enabled, the system prompts a Language & Other Guest Information window for language selection.
6. Similarly, the Weight & Height fields are enabled if the tour has a weight limit defined. When weight value exceeds the defined weight limit, extra charges applies per the rate defined in the bookable tour.
7. Click **OK** on the Language & Other Guest Information window. This adds the selected package to the Booking Details tab.
8. Click the **Tours / Packages** tab for a list of the tours belonging to the package in the Package Overview tab.
9. Continue to complete the booking by selecting one of the following options:
   - **Hold Bookings:** Places the booking on hold.
   - **Print & Post to Account:** Posts the booking and print the ticket and summary.

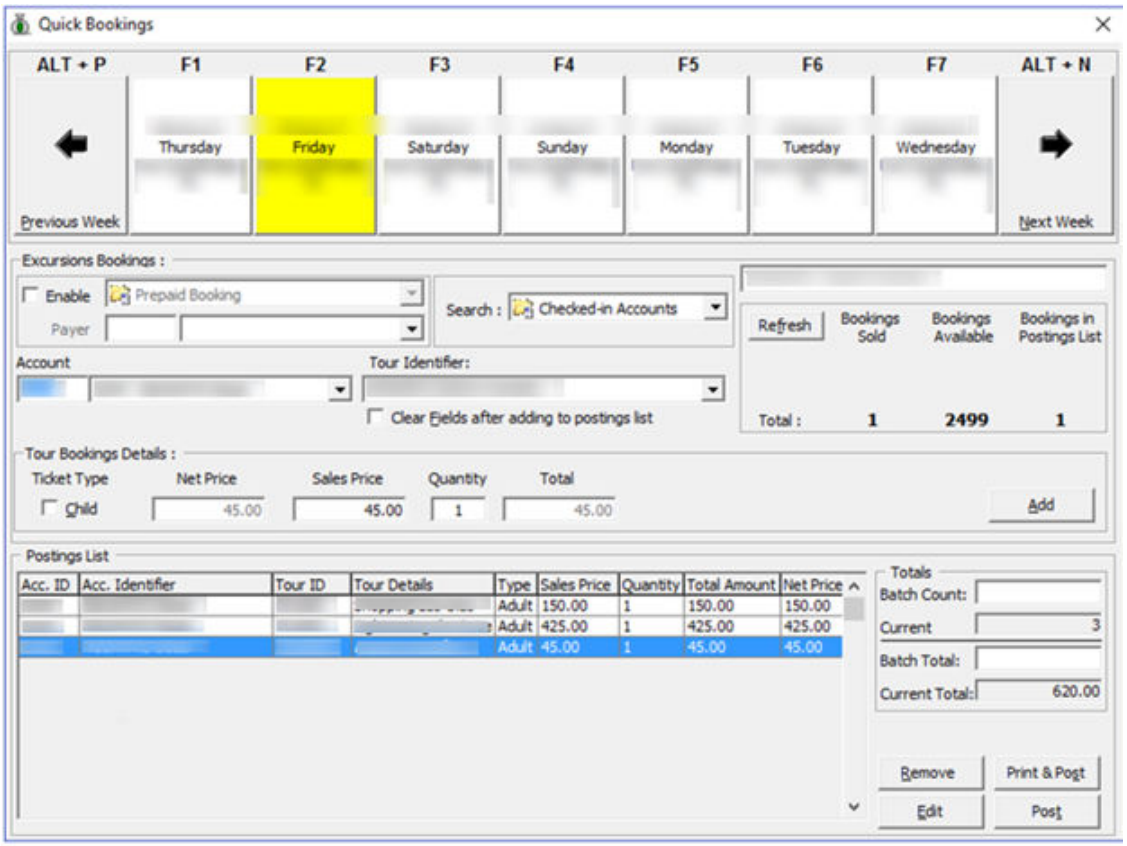
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- **Post to Account only:** Posts the booking without printing the ticket.
- **Void Unposted Bookings:** Removes all unposted bookings from the grid.
- **Refresh Tours Inventory:** Refreshes the booking counts for all tours on the page.

Quick Bookings

Quick Bookings is a simplified booking window that create bookings swiftly and it does not allow the booking to be placed on hold. The dates shown are a week from the system date and you can move the date forward or backward by a week with a function key.

Figure 4-20 Quick Bookings Window



Adding, Removing or Editing Quick Bookings

1. From the Book menu, select **Quick Bookings**.
2. Navigate the dates using the **Function Keys** listed above or click the date shown.
3. Click **Previous Week** to go back a week from the current date or **Next Week** to move forward a week.
4. At the Excursion Bookings section, select **Enable** to select a payer for the booking if the booking payment is to be routed to another party.
5. At the Search option, select the account status from the drop-down menu.
6. At the Account field, search for the required cabin/name.

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7. Click the **Tour Identifier** to select the tour from the drop-down list.
8. By default, the Ticket Type and price listed is for an adult. If the ticket is for a child, select the **Child** checkbox.
9. Enter the required quantity in the **Quantity** field.
10. Click **Add** to add the selection to the Posting List. Repeat the same to add other tour bookings. The total tour value and the count appear in the Totals section.
11. Click **Remove** to remove the selected tour from the Posting List or click **Edit** to edit the information.
12. Click **Post** or **Print & Post** to proceed with the booking.

Unposted Bookings

The Unposted Bookings has two tabs:

- **Unposted Bookings** lists bookings that are placed for previous, current and future cruises.
- **On Hold Bookings** lists bookings that are placed on hold.

Unposted Bookings for a future cruise is controlled by the **Booking Future Cruise Tours handled as Unposted** parameter, and all imported bookings are flagged as Unposted for all cruises. This helps to ensure that revenue is accounted for in the cruise when the excursion takes place. It is important to check the unposted bookings option frequently and follow through to ensure no revenue is lost.

Figure 4-21 Unposted Bookings

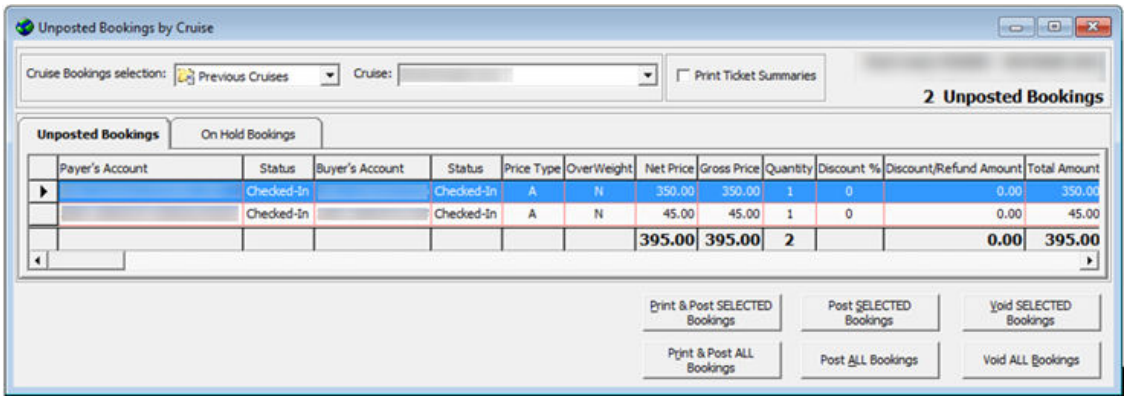


Table 4-10 Field Description of Unposted Bookings

Field	Description
Cruise Booking Selection	Filter function for Current, Future or Previous Cruise.
Cruise	The filter is enabled for selection when Past or Future Cruise is selected in the Cruise Booking Selection.
Print Ticket Summaries	Default to print ticket summary upon postings.

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Table 4-10 (Cont.) Field Description of Unposted Bookings

Field	Description
Unposted Bookings	Lists all the unposted bookings based on the filter criteria.
On Hold Bookings	Lists all on hold bookings based on the filter criteria.
Print & Post SELECTED Bookings	Post and Print Ticket for Selected booking(s).
Print & Post All Bookings	Post and Print Tickets for all the bookings listed in the grid. If one of the selected bookings fails to post, an error message is prompted at the end of the posting process.
Post SELECTED Bookings	Post selected booking(s) without printing the ticket. If one of the selected bookings fails to post, an error message is prompted at the end of the posting process.
Post ALL Bookings	Post all the bookings listed in the grid without printing the tickets. If one of the selected bookings failed to post, an error message is prompted at the end of the posting process.
Void SELECTED Bookings	Void and removes selected bookings (single or multiple) from the grid.
Void ALL Bookings	Removes all bookings listed in the grid.

1. From the **Book** menu, select **Unposted Bookings** option.
2. Select the **Cruise Bookings Selection** from the drop-down list and the **Cruise** for past or future cruise.
3. Select the tab and then bookings in the grid.
4. Complete the posting by selecting the option.

View Function

The View menu has six functions. They are Reports, Handling Lists, Account/Control No. Handling, Batch Ticket Printing & Exporting, Cruise Revenue Overview, and Cruise Revenue Details.

Reports

A set of standard report is loaded with the program during installation. If these reports are not suitable for ship operation, contact Oracle Customer Support for the report to be customized.

Printing a Report

1. From the View menu, select **Reports**.
2. At the Reports List section, click the **(+)** to expand the tree view, and select the report to print.
3. Navigate to the **Print tab** and select the available **Selection/Criteria**.

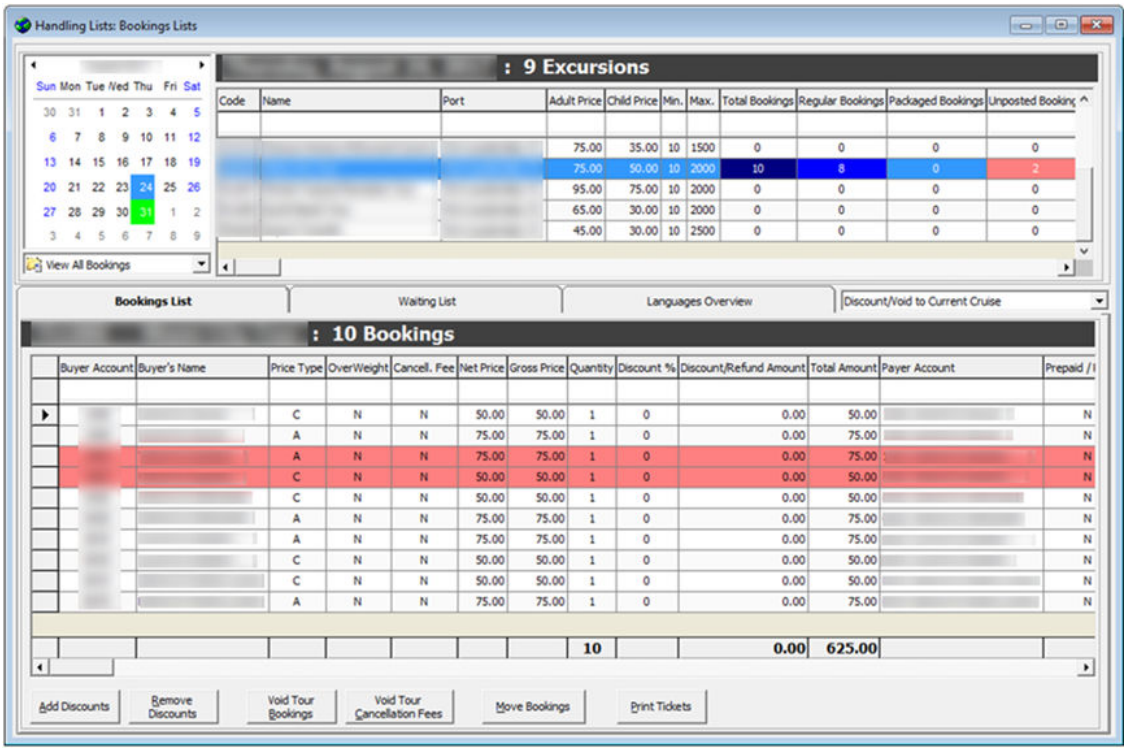
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4. Select a **Printer, Print Range** and **Copies** to print from their respective section, and click **Print**.
5. To view a report before printing, repeat the above steps, and navigate to the **Preview tab**.

Handling Lists

The Handling Lists provides a quick overview of the selected tour, enabling bookable tours to be managed from one location. The information shown is based on the selected date and filter, by the type of bookings. Lists of tours available for the day are shown in the top section of the window, and the Booking List, Waiting List, Language Overview, and Discount/Void to Current Cruise.

Figure 4-22 Handling List



The booking type are color coded per the below figure.

Figure 4-23 Bookings Color



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Booking List

Apart from listing the bookings for the day, functionalities such as posting discounts, voiding a tour, or moving a booking to another date and printing tickets are enabled to better manage the booking.

Add Discounts

1. Select a tour/booking and click on **Add Discount**.
2. Click **Yes**.
3. Select the discount options available in the **Discount Details** section followed by comments in the **Apply Discount** window.
4. Click **OK**. The discount amount is shown in the Discount column and reduces the Total Amount of the booking.

Remove Discounts

Selecting a tour/booking and clicking **Remove Discounts** to reverse the discount applied recalculates the **Total Amount** off the tour/booking.

Void Tour Bookings

This function voids the tour/booking, and posts a cancellation fee when applicable.

1. Select a tour/booking and click **Void Tour Bookings**.
2. At the Excursions Bookings Void window, select the **Apply Cancellation Fee** if the cancellation fee is to be imposed.
3. Click **OK** to proceed and enter the **void reason** manually when prompted or select from pre-defined reasons.
4. Click **OK** to complete the void and post the cancellation fee if the option is selected. This process prints a void report. Please ensure they are set up.

Void Tour Cancellation Fees

This function reverses the cancellation fees applied and removes the booking from the grid.

1. Select a tour or booking and click on **Void Tour Cancellation Fees**.
2. At the Void Cancellations Fees confirmation window prompts, click **Yes**.
3. Enter the **reason** manually when prompted or select a **pre-defined reason** from the drop-down list.
4. Click **OK** to confirm.

Move Bookings

This function moves the selected tour or booking to another date that has bookable tours.

1. Select a tour/booking and click the **Move Bookings**.
2. At the Move All Bookings window, select a **date** and **tour** to move the bookings to and then click **OK**.
3. At the confirmation prompt, click **Yes** to proceed or **Cancel** to abort.

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Print Tickets

This function reprints the ticket(s) for selected tour or bookings.

1. Select a tour or bookings and then click **Print Tickets**.
2. At the Reprint All Tickets prompt, click **Yes** to proceed or **No** to abort. All of the selected bookings ticket are reprinted using the default template.

Waiting List

The Waiting List tab lists all reservations placed under the waitlist for the selected date and tour. The information displayed is cataloged by **Active Waitlist (Unposted Bookings), Removed from Waitlist (Posted Bookings)**, and **Removed from Waitlist completely (Deleted Booking)**.

Print Tickets and Post to Account

1. Select a tour or bookings and click **Print Tickets & Post to Account**.
2. Clicking **Yes** at the Waitlisted Booking Confirmation prompt enables you to over book the tour when the capacity reaches the maximum booking allowed. Otherwise, it will be considered as a normal post option. Click **Overbook** to proceed or **Cancel** to abort.
3. The ticket and booking summary will be printed and booking is posted to waitlisted booking.

Post to Account Only

Similar to Print Tickets & Post to Account, this function only posts the waitlist booking and does not print any ticket.

Remove Waitlisted Bookings

This function void and removes the selected booking from the Waitlist Listing when the **Removed Waitlisted Bookings** is clicked.

Shift Waitlisted Bookings

The Shift Waitlisted Bookings allow you to reorder and prioritize the waitlisted booking.

1. Select a tour or bookings and click **Shift Waitlisted Bookings**.
2. At the Shift Waitlisted Bookings window, the default number is ‘1’. Enter a number to shift this booking to.
3. Click **OK** to confirm and shift the waitlisted bookings to the assigned number.

Rearrange by Booking Date and Time

The **Rearrange by Booking Date & Time** reorders the waitlist booking according to the Booking date/time and overrides the priority orders set earlier.

Print Info Tickets

This function prints ticket information for the selected booking.

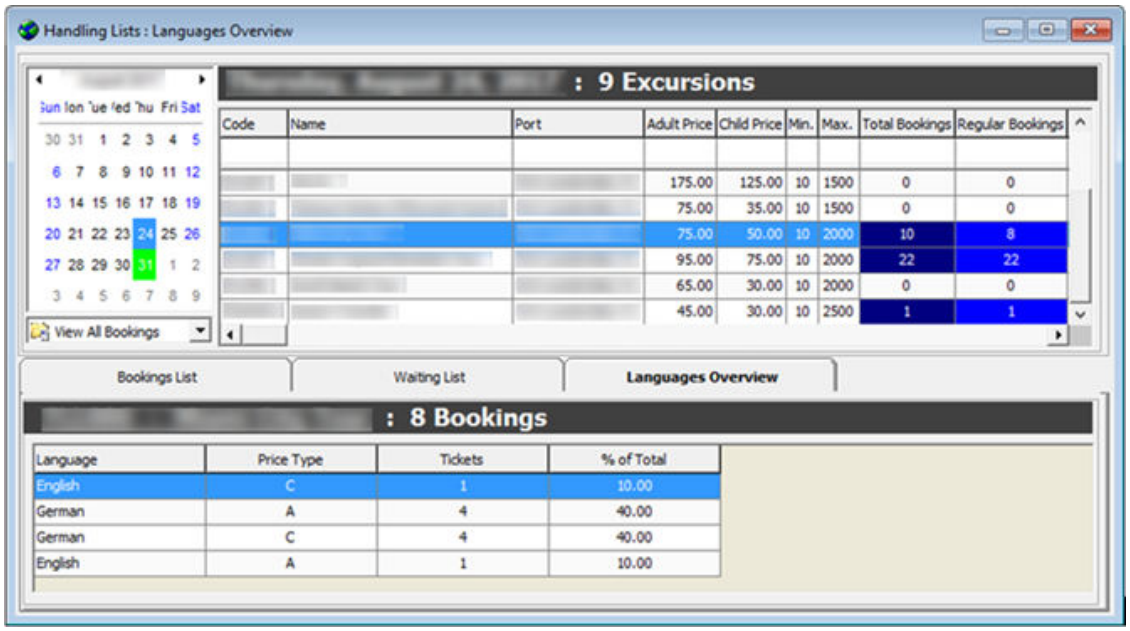
1. Select a tour or bookings and click **Print Info Tickets**.
2. Click **Yes** at the Print Waitlisted Info Tickets window. This prints tickets according to the defined report template.

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Language Overview

The Languages Overview provides a quick view of the type of language used in the bookings for the selected tour by Price Type and Tickets sold.

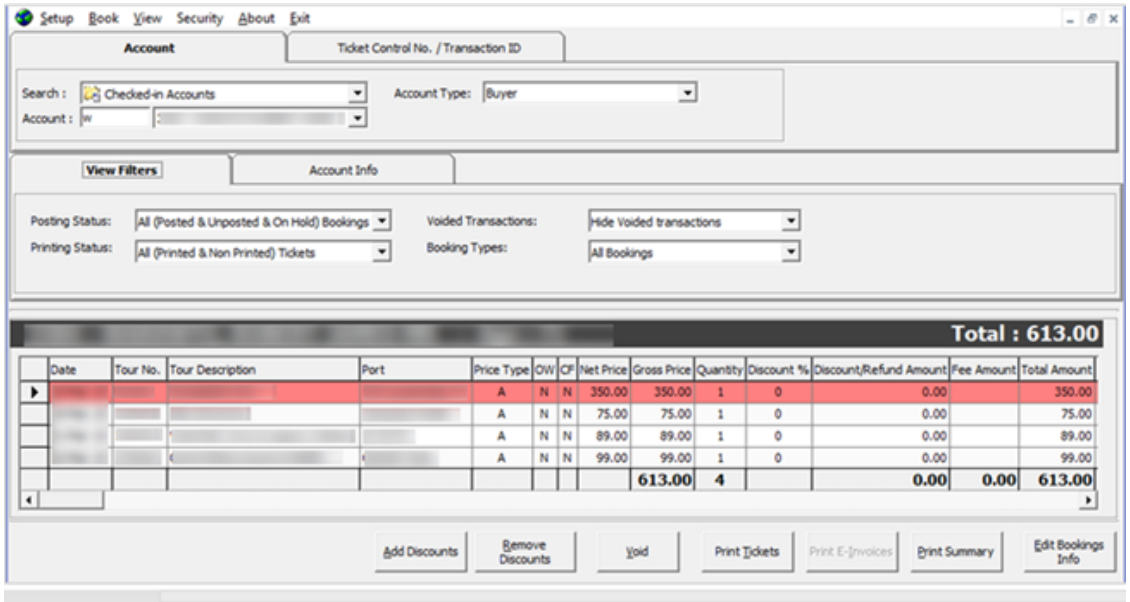
Figure 4-24 Language Booking Overview



Account / Control No. Handling

The Account Handling provides a view of the bookings made, posted, or voided through an account in a single window by navigating through available filters.

Figure 4-25 Account/Ticket Control Handling



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Table 4-11 Field Definition of Account/Control Handling.

Field Name	Description
Search	Search the guest account by status: Checked-In/ Reserved Accounts
Account Type	Search account by Payer/Buyer
Account	Search by Cabin No. / Name
View Filters	Filter accounts by Posting Status, Printing Status, Voided Transactions, and Booking types using options available in each filter.
Account Info	Display information of selected guest.
Features	Additional Function that can be performed on the account such as: • Add Discounts • Remove Discounts. • Void. • Print Tickets. • Print E-Invoice • Print Summary • Edit Booking Info
Ticket Control No. / Transaction ID	Provide a quick overview by searching Control No. or Transaction ID with the filtering options.
Promotion discount deviation value	Discount deviation value for the tour.

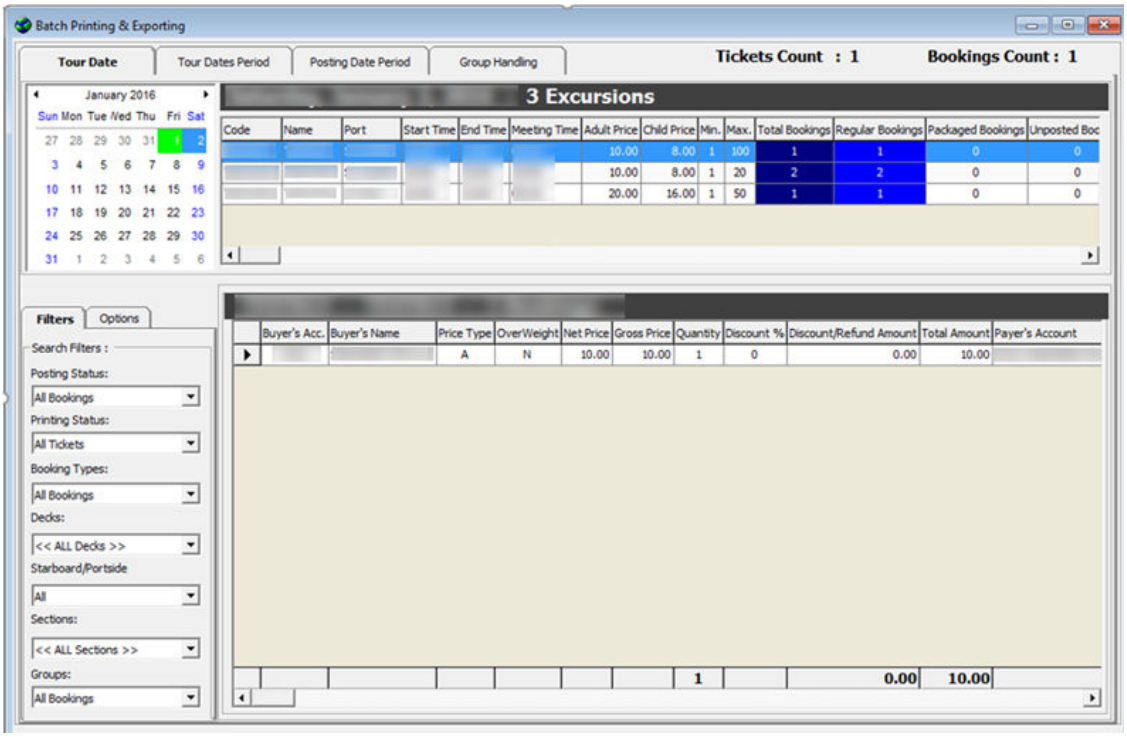
At the Account/Control No. Handling, search for an account using the filters, and then perform the desired task using the available features. See Handling List for more information on how to post, void, and print tickets.

Batch Ticket Printing & Exporting

The Batch Ticket Printing & Exporting enable tickets to be printed or exported by batch. The return results are based on the selection criteria entered in any of these tabs.

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Figure 4-26 Batch Ticket Printing and Exporting



Use the following tabs to print or export the tickets:

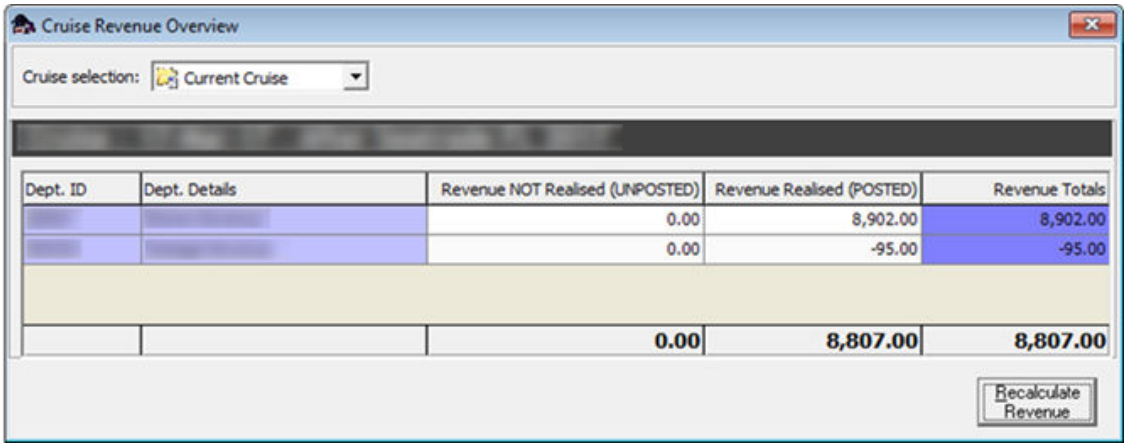
1. Select the date and tour.
2. At the **Filter** tab, select the **options** for each of the filters.
3. Navigate to the Options tab and select the checkboxes needed under the Primary Sort Order and Ticket Summaries for Payer or Buyer. If the **RES Product** checkbox is selected, the RES product is used as the primary sort order.
4. Select the **bookings** from the search results shown in the grid and click **Print Tickets** or **Export Tickets.**

Cruise Revenue Overview

The Cruise Revenue Overview displays the Total Revenue generated for the previous, current, or future cruise. Revenue is grouped by Department ID.

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Figure 4-27 Cruise Revenue Overview



Cruise Revenue Details

The Cruise Revenue Details provides a detailed view of revenue generated by date and tour, including the number of bookings by an adult or child, price and cost for each tour, and the total profit. You can also export the information to an Excel spreadsheet.

Parameters

The parameters below controls the behavior of the Shore Excursion program. They are editable under **Setup, Parameter**. Consult Oracle Customer Support for more details if you are unsure of the settings.

Table 4-12 Parameters

PAR Name	PAR Value	Description
Adult Min Age check for Kiosk	6	Minimum age of a passenger required to be able to use Kiosk or Business Center.
Alert Email address for Web Service booking		Separate each email address by a semicolon ";".
Allow FCKiosk Bookings	1	1 - Enable / 0 - Disable Kiosk Booking capability.
Allow Multiple Bookings	1	0 – Allow Kiosk to book only one ticket per Account-Tour. 1 – Enable Multiple Bookings for each Account-Tour.
Allow to use customized Account Information header	1	0 – Do not allow. Use the system default Account Information header. 1 – Allow customizing the Account Information header in Bookings and Account Handling window using custom SQL Query in PAR_COMMENT field.

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Table 4-12 (Cont.) Parameters

PAR Name	PAR Value	Description
Auto Populate Cancellation Fees info	0	1 – Enable auto-populating Cancellation Fees info when creating new Tour Templates or Bookable Tours.
Booking Future Cruise Tours handled as Unposted	1	0 – Future Cruise Tours bookings posted directly into accounts and accounted as Current Cruise revenue. 1 – Future Cruise Tours Bookings in Transit Accounts will appear in Unposted Bookings window under Future Cruise Bookings.
CancelFees Default Dept		Debit Department to be used when posting Cancellation Fees when voiding an excursion if they are not specified in Bookable Tours Setup.
Cancellation Fees Default Value	75%	Default Value or Percentage (if % sign exists) for Cancellation Fees. If the Use Cancellation Fees parameter is enabled and the Bookable Tour setup of a tour does not have a cancellation default value set, the value specified in the parameter is used when canceling this tour. If a different cancellation fee value is specified in the Bookable Tours setup, the value specified there will be used instead.
Child Max Age check for Excursions	14	Maximum age of an Account required to be able to book Child tickets in Excursions module.
Control ITV Parameter in FCUI	1	1 – Control the ITV Parameter in FCUI.
Current Cruise Unposted Bookings Notification	1	0 – Disable Current Cruise Unposted Bookings Notification Message. 1 – Enable Current Cruise Unposted Bookings Notification Message when starting Shore Excursions module (2 days before End Of Cruise).
Default Account Search	0	Default searched for in Cabin/ Account Window by: 1 – Payer / 0 – Buyer
Default Language	EN	Default language for excursions using two-letter ISO Code.

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Table 4-12 (Cont.) Parameters

PAR Name	PAR Value	Description
Default Posting Department for Amount Refunds		Default Credit or Debit Posting Department to use when posting Amount Refunds after selecting to apply Discount Amount option.
Default Posting Department for FCUI	8001	FCUI Default Posting Department used when creating new Tour Template or Bookable Tour.
Default Posting Department for Fees		Default Posting Department to be used when posting pre-booked (non- prepaid) bookings that include additional fees.
Default Posting Department for KIOSK	8001	Kiosk Default Posting Department to use when creating new Tour Template or Bookable Tour.
Default Posting Department for PREPAID	8001	Prepaid Default Posting Department to be used when creating new Tour Template or Bookable Tour.
Default Ticket Report	EXC01TICKET	Default Ticket Report for Shore Excursion.
Default setting for Prepaid/Routed Booking option	0	0 – Prepaid Booking option set as default in regular Bookings window. 1 – Routed Booking option set as default in regular Bookings window.
Default value for Sales Tax	0	Default Value or Percentage (if % sign exists) for Sales Tax.
Disable FCUI/Kiosk Booking options by default	0	0 – Enable FCUI/Kiosk Booking options by default. 1 – Disable FCUI/Kiosk Booking options by default for all newly created Bookable Tours from within Excursions module and all newly imported Bookable Tours imported from RESOnline.
Disable Tours display if Max count is 0	0	0 – Enable Tours to display in Booking window if Max count is 0. 1 – Disable
Discounts affect Taxes	1	Discounts Calculation Method to use: 0 – Discounts don't affect Taxes. 1 – Discounts affect Taxes.

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Table 4-12 (Cont.) Parameters

PAR Name	PAR Value	Description
Display Booking Origin column	2	0 – Do not Display Booking Origin column (SHOREX - IMPORT - KIOSK - FCUI) in Batch Ticket Printing and Exporting window. 1 – Display Booking Origin column in Batch Ticket Printing and Exporting window. 2 – Display Booking Origin column in Batch Ticket Printing and Exporting window.
Display Time Fields in 24Hour format	1	0 – Display time fields in 12Hour AM/PM format. 1 – Display time fields in 24Hour format.
Display Time elements on all grids	1	0 – Do not Display Tour Time elements on grids (Start / End / Meeting Time).
Display Tour Name instead of Tour Code	0	0 – Display Tour Code in bookings window. 1 – Enable displaying of Tour Name in bookings window.
Display Tours in Green if Minimum not reached	0	0 – Default setting shows tour labels in blue regardless of minimum attendees reached. 1 – Displays Tour labels in Booking window as green when minimum attendees have not been reached.
Enable Bookable Tour assignment to specific Cruise	0	1 – Assigning a Bookable Tour to a specific Cruise is mandatory and this System Cruise assignment is used in Unposted Bookings window when searching for Tour Bookings.
Enable Embarkation Dates search	0	1 – Enable Embarkation Dates search checkbox in Tour Dates Period tab in Batch Printing And Exporting window.
Enable Group Tour Message	0	0 – Disable pop up message on group tour linking message 1 – Enable.
Enable Handicapped Warning	1	0 – Disable Handicapped Warning in Bookings window. 1 – Enable Handicapped Warning.
Enable Language info for Kiosk	1	Allow Guests to enter Language information at Kiosk Terminal.
Enable Multiple Bookings	1	0 – Disable Multiple Bookings. 1 – Enable Multiple Bookings functionality in Bookings window.

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Table 4-12 (Cont.) Parameters

PAR Name	PAR Value	Description
Enable NOPRINT for Shorex Voids	1	1 – Enable Shorex Voids to "NO PRINT" on accounts in Management module automatically. 0 – Disable "NO PRINT" for Shorex voids on accounts in Management module.
Enable Onboard Account window	1	1 – Enable / 0 – Disable the access to the onboard Account details window in Kiosk.
Enable OverWeight Bookings	1	1 – Enable / 0 – Disable use of Overweight Bookings that require two seats. 2 – Enable but checkbox is by default deselected when Bookings window opens.
Enable Shoreside Refunds for Prepaids	1	1 – Enable Refunds Shoreside (on System Account) when applying Discounts or Voids to Prepaid Bookings. 0 – Disable Refunds Shoreside.
Enable Tour Dates search	1	1 – Enable Tour Dates search checkbox in Tour Dates Period tab in Batch Printing and Exporting window.
Enable Tours Daily Limit check	1	1 – Enable Bookable Tours per Date limit check in Excursions Setup. 0 – Disable.
Enable Tours Overbooking	1	0 – Disable Tours Overbooking. 1 – Enable Tours Overbooking.
Enable Voiding Bookings from previous Cruises	1	1 – Enable Voiding Bookings that belong to previous Cruises or have been closed. 0 – Disable.
Enable Voiding Bookings on Checked-Out Accounts	0	1 – Enable Voiding Bookings on Checked-Out Accounts with Voided Transaction posted into Internal Error System Account.
Exc Link for all Excursions	0	0 – Perform linking check only for Packaged Excursions. 1 – Perform linking check for all Excursions.
Exporting Tickets	0	1 – Exporting Tickets is in progress - Does not allow any other process to start.
Future Tour bookings Warning	1	1 – Provide warning message to prevent future Tour bookings for current cruise guests.

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Table 4-12 (Cont.) Parameters

PAR Name	PAR Value	Description
Include Sales Tax in Price	0	1 – Include / 0 – Exclude Sales Tax from Excursions Price.
Keep same Tours Page when selecting new Account	0	0 – Return back to first Tours Page after selecting a new Account. 1 – Stay on same Tours Page after selecting a new Account.
Move Expected Accounts Waitlisted Bookings to EPO	0	0 – Keep Expected Accounts Waitlisted Bookings into EPW. 1 – Enable moving Expected Accounts Waitlisted Bookings from EPW to EPO when trying to post Waitlisted Bookings for Expected Accounts in Handling List window.
Notify for Overlapping Tours	0	0 – Disable. 1 – Enable Overlapping Tours checking and notification during Booking process.
Notify when Booking Future Cruise Tour as Unposted	1	1 – Enable Notification Message when Booking Future Cruise Tours to be handled as Unposted is enabled.
Onboard Refund for Prepaids	1	0 – Shoreside refunding when voiding Prepaid Bookings. 1 – Onboard.
OverWeight Price Increase	50%	Default Over Weight Bookings Net Price increase by percentage (%) value.
OverWeight Weight Limit	250	Weight above this value during Booking is considered as Over Weight Booking.
Posting Status Box Default Selection	0	0 – All (Posted and Unposted) Bookings, 1-Posted Bookings, 2-Unposted Bookings
PrePaid CancelFee Default Dept	8422	Debit Department to be used when posting Cancellation Fees when voiding PrePaid Bookings in Excursions.
PrePaid Voids Default Dept	8421	Debit Department to be used when posting Voids when voiding PrePaid Bookings in Excursions.
Prepaid Fees Posting Department	8011	Prepaid Fees Default Posting Department to be used when posting imported Prepaid Bookings that include additional Fees.

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Table 4-12 (Cont.) Parameters

PAR Name	PAR Value	Description
Prepaid Fees Void Department		Prepaid Fees Default Voiding Department to be used when Voiding imported Prepaid Bookings that include additional Fees.
Prepaid Loyalty Discounts Posting Department	8735	Prepaid Discounts Default Posting Department to be used when refunding due to Loyalty Package.
Prepaid Marketing Discounts Posting Department	8736	Prepaid Discounts Default Posting Department to be used when refunding due to Marketing Discounts.
Prepaid Marketing Discounts System Account	20550	Default System Account to be used when posting Prepaid Marketing Discounts
Prepaid Status when Discounting Prepaid Bookings	Y	Y – Keep Prepaid Status when Discounting Prepaid Bookings, N – Remove Prepaid Status.
Prepaids Refund Confirmation	1	1 – Require Confirmation when Refunding Prepaids during voiding.
Previous Cruise Tours Warning	1	1 – Provide warning message to prevent Previous Cruise(s) Tour bookings for Current Cruise guests.
Print + Post Summary	1	0 – Do not print summary after printing tickets in “Print+Post”, 1 – Print
Print Excursions Summary	1	0 – Do not print summary after printing tickets in “Print+Post” 1 – Print.
Print Excursions Tickets	1	0 – Do not print tickets 1 – Print.
Print Void Summary	1	0 – Do not print summary after voiding tickets 1 – Print.
Print Voided Tickets	1	0 – Do not print tickets when voiding; 1 – Print also voided tickets (please note that you must also change selection formula for tickets in this case).
Print Waitlist Receipt when moving to real Booking	1	0 – Do not Print Receipt when moving somebody from the waitlist to a real booking on top of the normal ticket, 1 – Print.

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Table 4-12 (Cont.) Parameters

PAR Name	PAR Value	Description
Require Waitlist Confirmation	1	0 – No confirmation when adding Booking into Waitlist. 1 – Display confirmation with Waitlist No.
Show Disabled Accounts in Bookings windows	0	1 – Enable showing Accounts with Postings Disabled status in Bookings windows.
Show Voided Transactions	1	1 - Show / Hide Voided Transactions in Cabin/Account window only
Signature Display Body Text Font	40	Value must be bigger than 12 - 200.
Ticket Summaries check buttons default selection	0	0 – Nothing is selected, 1 – Both options are selected (Payer and Buyer), 2 – Payer option is selected, 3 - Buyer option is selected.
Unposted Bookings Posting		When Unposted Bookings posting is in progress, the system writes the Workstation Name in order not to allow any other process to start.
Use Adult/Child Max Counts	0	0 – Do not use Adult/Child Max counts separation , 1 – use Adult/Child Max counts separation
Use Bookable Tours Languages linking	1	Use Bookable Tours Languages linking when Booking and Language module is enabled, to limit the available Language selection only with the Languages defined in Bookable Tours Setup.
Use Cancellation Fees	1	1 – Enable / 0 – Disable use of Cancellation Fees when voiding Bookings in Excursions.
Use E-Invoices Exporting and Printing	0	1 – Enable the overall functionality for storing and printing E-Invoices.
Use E-Invoices Printing option	0	1 – Enable the option to also physically print E-Invoices on paper.
Use Excursions Waitlists	1	1 – Enable / 0 – Disable use of Excursions Waitlists
Use Free Text Port Entry	0	0 – Use Predefined Port Selection, 1 – Use Free Text Port Entry.

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Table 4-12 (Cont.) Parameters

PAR Name	PAR Value	Description
Use Free Text Tour Comments/ Recommended Clothes	0	0 – Use Predefined Tour Comments/Recommended Clothes text for different Languages. 1 – Use Free Text Tour Comments/Recommended Clothes.
Use Language Module	1	0 – Deactivate it. 1 – Activate Excursions Language Module,

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5
Spa

The Spa Management module offers a complete solution to better manage the onboard Spa. It enables tracking of individual therapists' skills from offering classes to promotional discounts and many more. Its central scheduling and appointment calendar allows multi-therapist bookings. Additionally, the module has a point-of-sale function for therapies and for retail items with barcode scanning.

Setup

System Setup

The program uses the parameters stored in the **PAR** table.

To update the parameters, navigate to the **Administration** module and select **Database Parameters** from the **System Setup** menu.

The parameters have the following definitions and acceptable values.

Table 5-1 Description of the Options that Appear on the Database Parameters

Option	Description
Max Appointments	Used as the upper bound on appointments for a single day and Spa location. The parameter needed to improve processing speed by setting up the number of appointments at the start-up of the system. Suggest 500 as the initial value.
Itemizers	Appended to the partial Department ID from Location Maintenance to create a full posting department for a charge for discounts, cancellations and no shows. See: Spa Itemizers and Location Prefixes Setup for more information.
Start/End Scanner Characters	Start/End scanner characters used by the system to determine that the bar code scanner code follows.
No Show Percent	The percent of the service charge that applies to a no-show guest.

Financial Setup

Setting up the Spa Itemizers and Location Prefixes

The program requires the Spa Itemizers, Location Prefixes and Cancel Percents to generate a booking and these are setup in the Financial Setup.

1. At the Setup menu, select **Financial Setup** from the drop-down list
2. Select **Spa Itemizers Setup**

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3. At the left pane, right-click to add an itemizer
4. Enter the Department prefix in the first field of the description, and name the prefix in the second field
5. Click **Apply** to save

Modifying an Entry

1. Right-click the **code** in the tree view.
2. Make the modifications and click **Apply**.

Deleting an Entry

1. Right-click the **code** from the tree view and select **Remove**
2. A message confirmation dialogue shall prompt. Click **Yes** to confirm deletion.

> **Note**
>
> You can only delete a Spa Department Prefixes that are not in use.

Retail Setup

Retail Items, Groups, and Lines

In the Retail Group, you can define the type of Retail Items available at the Spa. The Retail Group is used to identify the Retail Line such as the manufacturer or the sub-type of item.

The Retail Groups are kept within the Retail Setup menu.

Adding a New Group

1. To add a new group, right-click the tree view and select **Add New** from the option menu.
2. Enter the **Code, Description** and **Comments**.
3. Click **OK**.

Deleting a New Group

1. Select the group to delete from the tree view.
2. Right-click and select **Remove** from the context menu.

Updating a New Group

1. Select the group from the tree view.
2. Click **Update**.

The Retail Items information is divided into three tabs.

- **General** – Displays General Information about each Retail Item.
- **Pricing & Sales** – Displays Pricing Period information.
- **Bar Codes** – Displays all available Bar Codes assigned to each Retail Item.

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Table 5-2 Field description of options in Retail Lines Setup Screen

Option	Description
Group	The Retail Group to which this item belongs.
Shore Code	The SKU number for this item. Based on recent discussion, this field will expand so that an unlimited number of SKU's can be defined for an item.
MMS Code	MMS or external F&B system Item Code (Crunch Time).
Active	If this field is checked, then the item is available for sale.
Name	The short name of the item.
Descriptions	A longer name or description for the item.
Line	The Retail Line for this item.
Prepaid Itemizer	The Prepaid posting suffix for this item (For Prepaid Retail). Items imported using the Data Import module.

Table 5-3 Field description of Options in Retail Lines Setup – Bar Codes Tab

Option	Description
Bar Code ID	Multiple Bar Codes associated with this item.

Table 5-4 Field description of options in Retails Lines Setup – Pricing and Sales Tab

Option	Description
From Date	The starting date for a new Price.
To Date	The ending date for a new Price.
Price	The price to apply for the period specified from The Starting Date to the Ending Date.
Price Grid	A list of all active prices for this item. The item must always have a price for all dates from today through Dec 31, 2099.

Treatment Setup

The Treatment Setup is used to define the type of treatments available at the Spa and you can add, delete or edit the treatment items and group when needed.

Treatment Items and Groups

Treatments are assigned to a Treatment Group for ease of search for specific Treatments. To make changes to Treatment Groups, select **Treatment Groups** from the Treatments Setup menu.

Adding a New Group

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1. To add a new group, right-click on the **tree view** and select **Add New** from the options menu.
2. Enter the **Code, Description**, and **Comments** and then click **OK**.

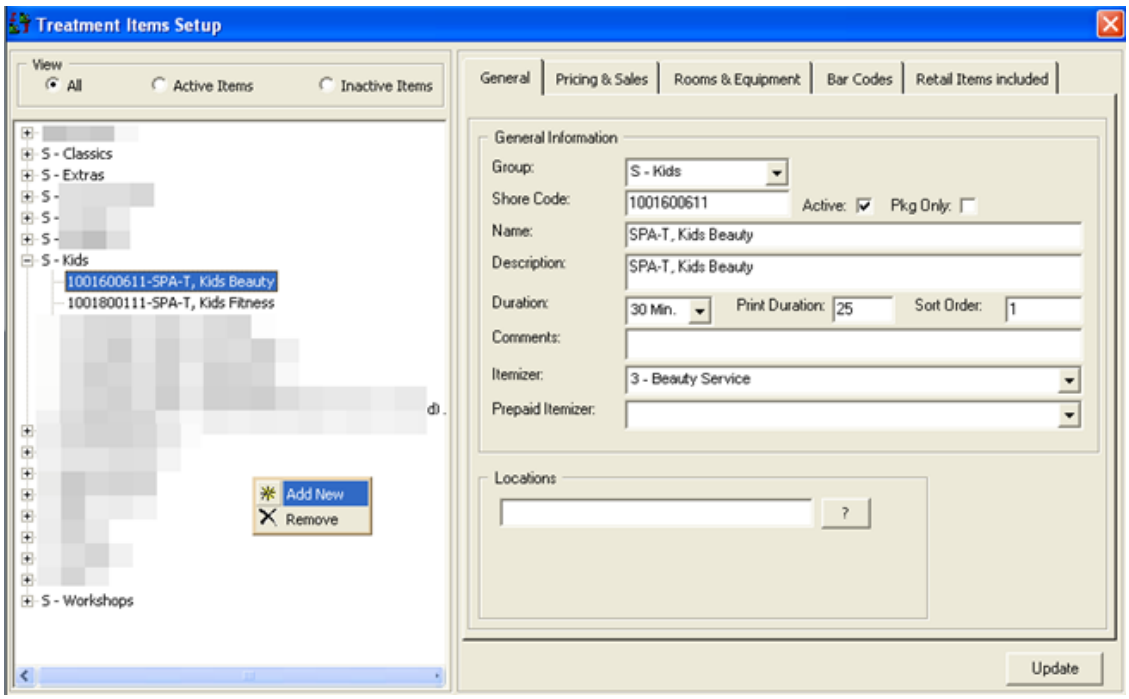
Deleting a Group

1. Select the group from the tree view.
2. Right-click and select **Remove** from the context menu.

Updating a Group

- To update the description of a group, select it from the tree view, make any changes needed and click **Apply** or **OK**.
- To update a Treatment, select **Treatment Items** from the Treatment Setup menu. Treatment Group and Treatment Name tree view appears. Make the required changes and click **Update**.
- To add or remove a treatment, right-click on the **Treatment** from the tree view and select **Add New** or **Remove**. To update a treatment, click on the **tree view**, make the required change, and then click **Update**.

Figure 5-1 Treatment Items Setup



The Treatment Items setup is divided into five tabs:

- **General** – displays Pricing Periods information.
- **Pricing & Sales** – displays Pricing Periods information.
- **Rooms & Equipment** – displays Pricing Periods information.
- **Bar Codes** – displays all available Bar Codes assigned to each Retail Item.

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- **Retail Items Included** – displays Retail Items.

Table 5-5 Field description of Option in Retail Lines Setup – General Tab

Option	Description
Group	The treatment group to which this item belongs.
Shore Code	The SKU number for this item. This field expands so that an unlimited number of SKUs can be defined for an item.
Active	If this field is checked, then the item is available for sale. If it is not checked, then this item is no longer available for sale.
Name	The short name for the item.
Description	A longer name or description for the item.
Duration	The number of minutes to block on the calendar for this treatment. Must be able to divide the duration in fifteen (15) minutes block.
Print Duration	The number of minutes to print on the guests' reservation ticket. For example, a treatment may have a print duration of fifty (50) minutes, but sixty (60) minutes must be blocked in the Booking Calendar to account for the required cleanup of the room after the treatment is completed.
Sort Order	The order to display this treatment within a treatment group on the Booking Calendar.
Comments	Any additional comments or requirements for the Treatment.
Itemizer	The posting suffix for this item.
Prepaid Itemizer	The Prepaid-posting suffix for this item (For Prepaid Treatment Reservations imported using the Data Import module).

Table 5-6 Field description of Options in Retail Lines Setup – Room &Equipment Tab

Option	Description
Rooms	Default Rooms assigned to be for selected treatment.
Equipment	Default Equipment and its quantities assigned to be used with selected treatment.

Table 5-7 Field description of Options in Retail Lines Setup – Bar Codes Tab

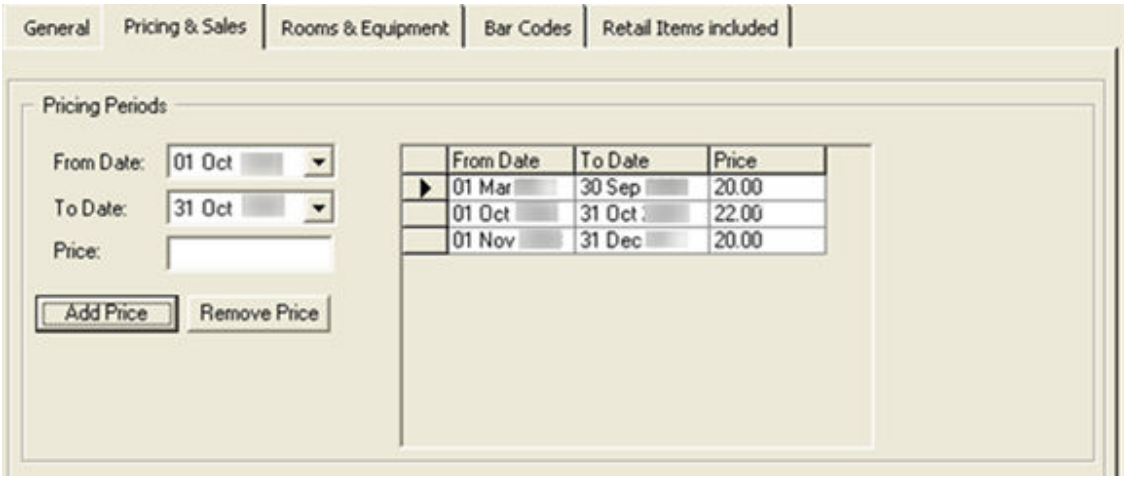
Option	Description
Bar Code ID	Multiple Bar Codes associated to this item.

Retail Items Included

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Retail Items can be either suggested or included based on the **Include** checkbox. Items that are suggested appears on the Suggested Item grid on the Posting form.

Figure 5-2 Pricing & Sales (Add Price)



Once a price has been added to an item, you can directly update the new price in the grid for that date range by typing over the old price and clicking the **Update**.

Treatment Rooms

Each treatment in the Spa Management System must be assigned to a predefined Treatment Room. The application ensures that you do not over book the available rooms with bookings. For example, the system will keep track of the room availability for a specific time and then warn the crew member making a reservation when an appointment will over book a specific room. The descriptions are updated by selecting **Treatment Rooms** from the **Treatments Setup** menu.

Inserting a Room

1. Right-click on the **tree view**.
2. Select **Add New**.
3. Click **Insert**.

Deleting an Existing Room

1. Select the **Room** on the tree view.
2. Right-click and select **Remove**.

Updating an Existing Room

1. Click on the **tree view** and the information for that equipment appears.
2. Make the changes, if any, and click **Update**.

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Table 5-8 Field description of option in Treatment Rooms Setup

Option	Description
Code	Short name for this room.
Description	Long name for this room.
Active	If this field is checked, then the room is available for treatment.
Bookings	If it is not checked, then this room is no longer available for treatment bookings.
Comments	Any additional comments for this room.

Packages and Packages Groups Setup

The Package Setup allow you to create and maintain the Spa Packages.

Creating a New Package

1. Click **Setup, Packages Setup**.

   Before you can assign any Treatment and/or Retail Items to the Package, you must save the package definition by clicking the **Insert**. This tab contains the necessary controls to assign Treatment and/or Retail Items to the package and maintain its package prices.
2. To assign a new Treatment Item to the package, select the **Item Type**.
3. Choose the correct **Treatment Item** from the list box and click the **Add Item**. The selected Treatment Item will be assigned to the package and appear on the Packaged Items Linking grid. Repeat the above steps to assign to the package all the necessary Treatment and/or Retail Items.

Packaged Items Price Definition

For a specific package to be valid for sale, all items assigned to the package must also have their Package Prices assigned separately.

To view, edit, create or remove Pricing periods, select the item from the grid. All previously assigned Pricing periods will appear in a new grid.

In the following example, there are no prices previously assigned, so the example starts by adding prices.

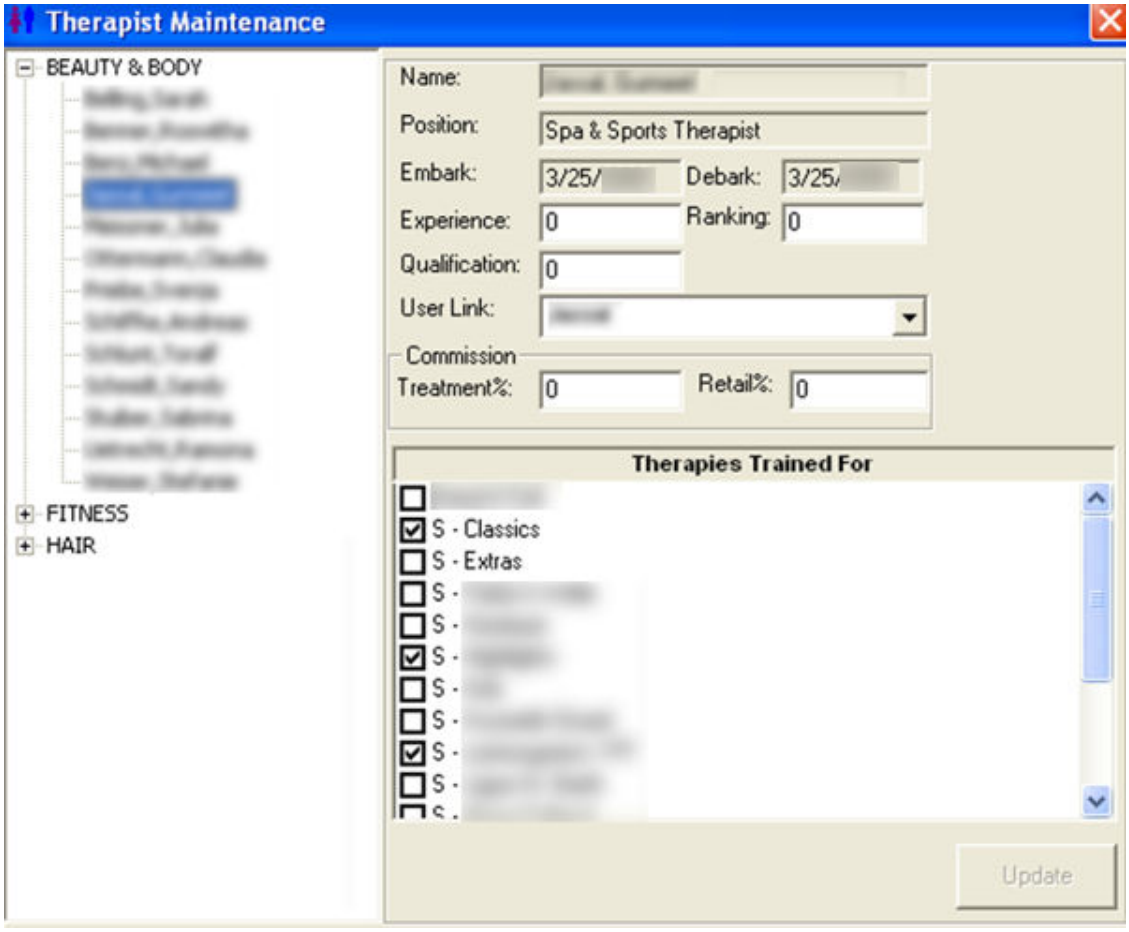
1. Add the starting and ending dates of the pricing period and the price and click **Add Price**.
2. Click **Update** to save all pricing definition for this item.

Therapists Setup

To maintain Spa Therapists, select **Therapist Setup** from the main Setup menu.

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Figure 5-3 Therapist Maintenance



Depending on the operational positions you assigned earlier in **Location Maintenance** into Crew POS, the screen will list all assigned Crew members as Therapists.

You can view Embarking / Disembarking Dates information as well as the specific values defined for each Therapist such as:

- Qualification Level
- Experience Level
- Guest Satisfaction Rating
- Assign the commission percentage each therapist receives on Therapy and/or Retail sales.
- Assign therapies that each crew member has and is qualified to perform.

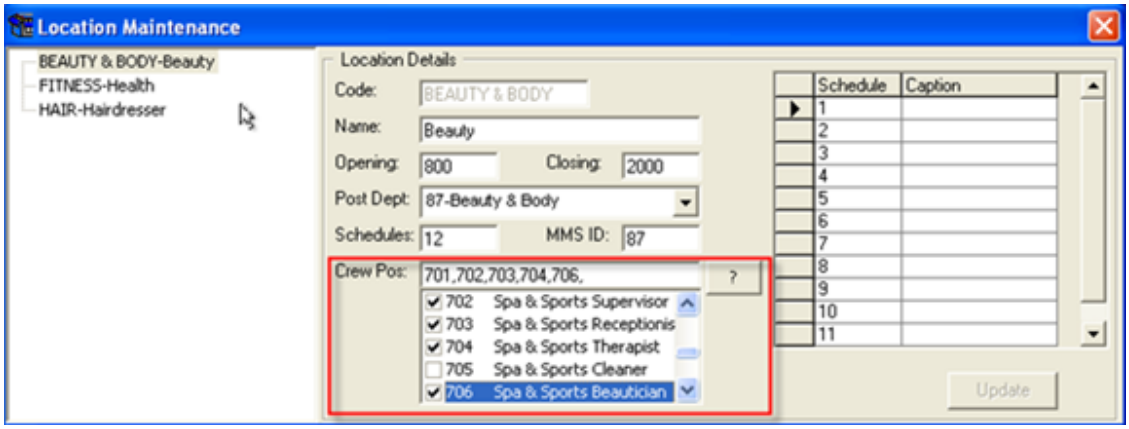
Location Maintenance

A Spa Location is associated with a main revenue area within the Spa facilities. Usually a Spa is divided between Hair/Nail, Treatments and Fitness, but some ships may have additional locations, or some may only have one (1).

The Spa location is maintained in **Location Maintenance** from the main Setup menu.

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Figure 5-4 Location Maintenance



Adding a New Location Maintenance

Right-click on the tree view, select **Insert**, complete the form and click the **Insert**.

Deleting a Location Maintenance

Select on the tree view, right-click and select **Delete**.

Table 5-9 Description of Available Options on Location Maintenance Setup

Option	Description
Code	Short name for this location.
Name	Long name for this location.
Opening	The default opening time for this location in military time without a semicolon.
Closing	The normal time for this location in military time without a semicolon. If the location closes after midnight, the system accepts time beyond 2400 as closing time in the morning of the next day.
Post Dept	The “Departmental Prefix” – SDL for this location. This code prefixes itemizers to determine the Department ID to which a change is to be posted. This is a view name to store the SPA Department Prefix. The ‘Post Dept’ in the Location Maintenance Setup search for the setup in the Financial Setup – Spa Location Department Prefix, where the setup will store in **Typ_SDL**. For example: Spa Dept Prefix is 87, the item charges will post into the department where the POS Revenue Center = 87.
Schedules	The default number of schedules associated with this location. A schedule represents the calendar of appointments for a single therapist.
MMS_ID	MMS or external F&B system Department itemizer (Crunch time).

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Table 5-9 (Cont.) Description of Available Options on Location Maintenance Setup

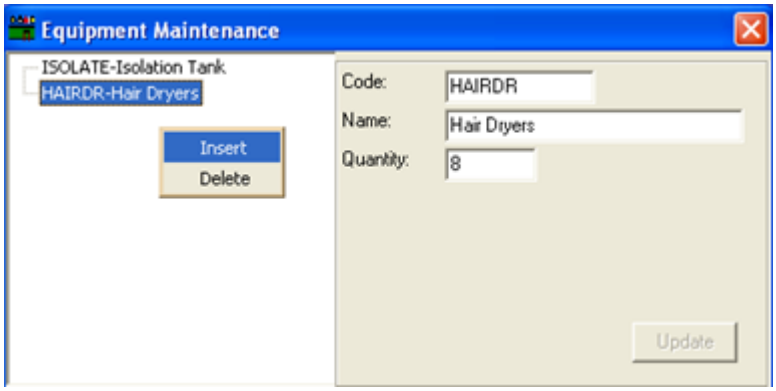
Option	Description
Crew POS	A list of Operational Positions that are assigned to work at this location. Clicking question mark ('**?**') button will open the list-box that lists all Crew Operational Positions. Check the boxes to select the Crew Position.
Schedule/Caption Grid	For each Schedule, enter the default caption for the Schedule. This caption appears on the booking calendar to help the crew member taking reservations find a suitable therapist for a service.

Equipment Maintenance

Equipment in the Spa Management System is defined as any type of resource that must be used when fulfilling a Spa Service. Possible types of equipment include Stylist Stations, Showers, Aroma Treatment Stones, and so on.

- The system does not book individual resources when making an appointment. Instead, it ensures that the bookings do not overuse the available equipment.
- Equipment descriptions are updated by selecting **Equipment Maintenance** from the Setup menu.

Figure 5-5 Equipment Maintenance



Inserting an Equipment

To insert a new piece of equipment,

1. Right-click on the **tree view**.
2. Select **Insert**.
3. Complete the form and click **Update**.

Deleting an Equipment

To delete a piece of equipment,

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1. Select the equipment on the tree view.
2. Right-click and select **Delete**.

Updating an Equipment

To update a piece of equipment,

1. Click on the **tree view** and the information for that equipment appear.
2. Make the changes, if any, and click **Update**.

Table 5-10 Description of Available Options on Equipment Maintenance Setup

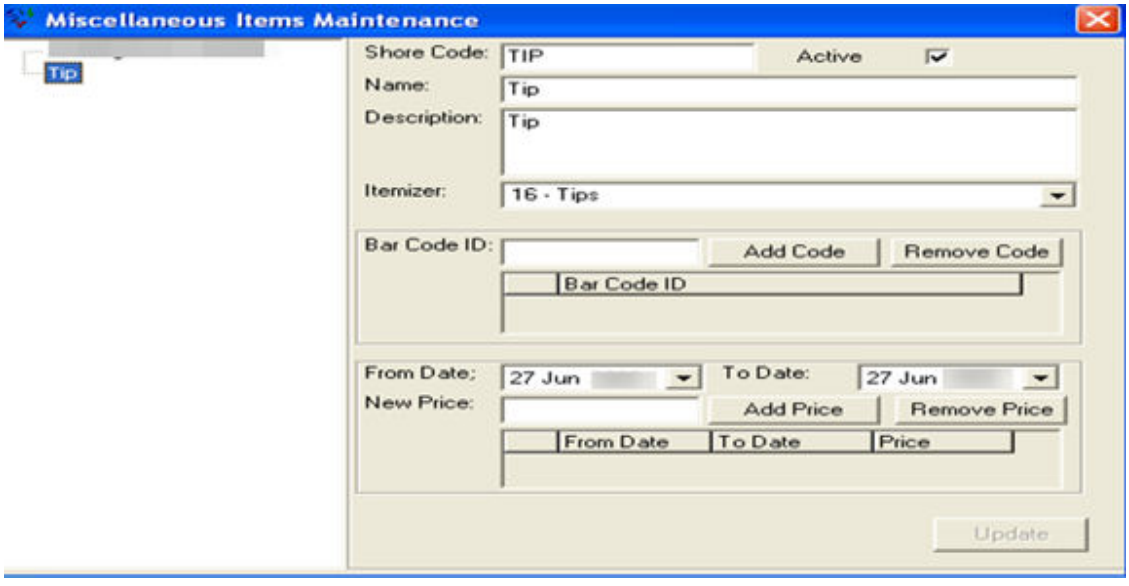
Option	Description
Code	Short name for this equipment.
Name	Longer name for this piece of equipment.
Quantity	The number of pieces of equipment useable on board the Ship.

Miscellaneous Items

Other than the Treatment and Retail Items, the Spa module also provides the functionality to maintain and use various items that cannot be accounted for as Treatment or Retail Items, for example Tips. Such items are the various Tips that can be used in the Posting screen while posting other Treatments and/or Retail Items

Similar to the setup of Treatments and Retail Items, Miscellaneous Items can be defined by various Bar Codes and Sales Price periods.

Figure 5-6 Miscellaneous Items Maintenance



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Operations

The Spa Operations provides functionalities such as reporting, reservations, booking handling, as well as daily operational setup

Reservations

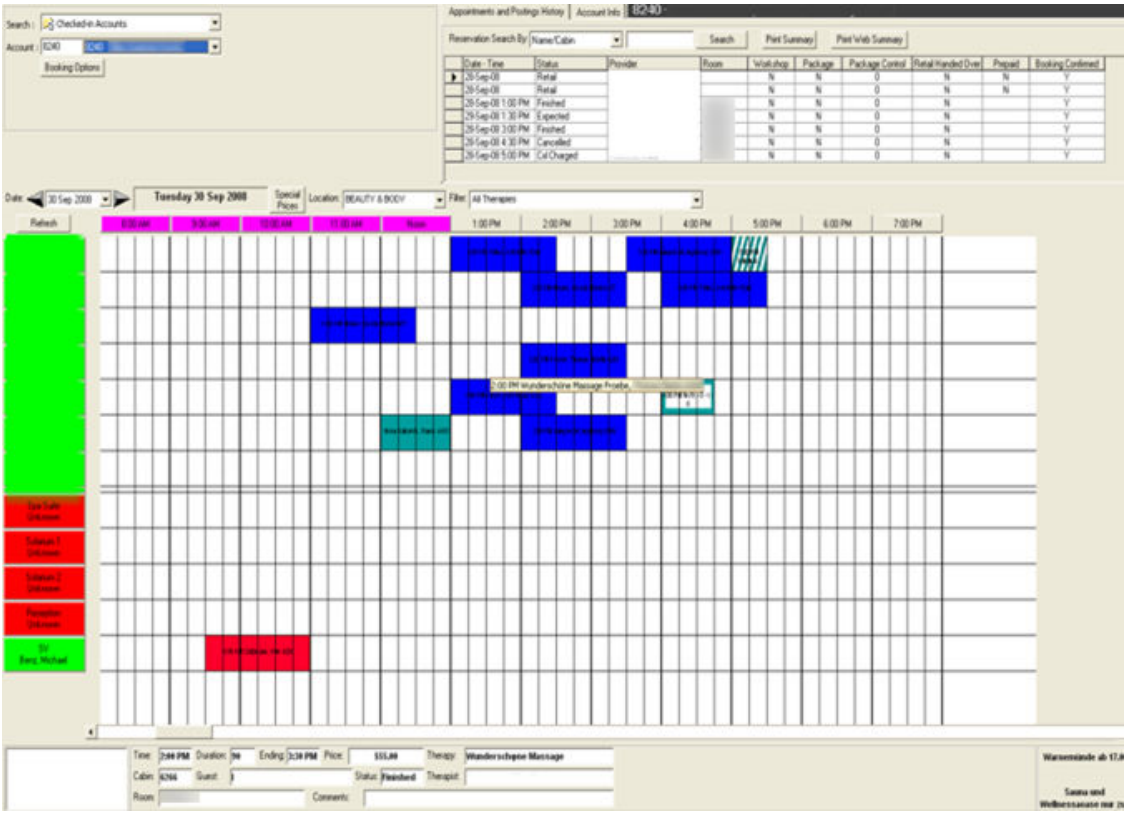
Main Reservations Screen (Booking Calendar Overview)

The Booking Calendar is the main form in the Spa Management System.

To display the Booking Calendar, select **Reservations** from the Operations main menu.

> **Note**
>
> You can add, update, cancel, check-in and complete a reservation. The form provides grids to look-up and display guest information by a variety of look-up criteria.

Figure 5-7 Booking Calendar Overview



- Right-click on a **row** of the Appointments Grid. On an appointment or on an empty space will display different context menus will appear. From the Guest selection, you can create a new regular Reservation, add a new Package or create a Retail posting for the selected guest.

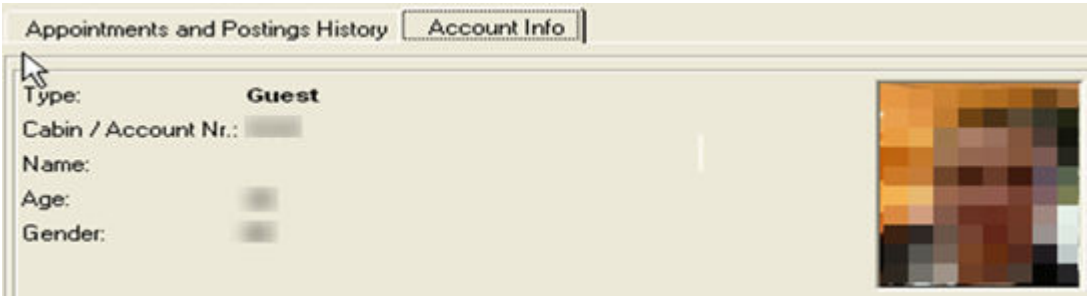
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- You can edit, cancel, no show, check-in, post, view posting, void posting or print the appointment ticket.
- In the Booking Calendar, you can use the Suggest feature, Add a Reservation, Add a Package or a Workshop, and Block the Schedule.
- From an Appointment, you can Edit, Cancel, No Show, Check-In, Post, View Posting, Void Posting, Print the Appointment Ticket, create a new Block Schedule or Add a Reservation or a new Package or Workshop depending upon the status of the appointment.

Guest Selection

Guest Information can be queried by **Guest last Name** or **Stateroom Number** by entering look-up information into the **Account field** and pressing the **Tab Key**.

Figure 5-8 Account Info

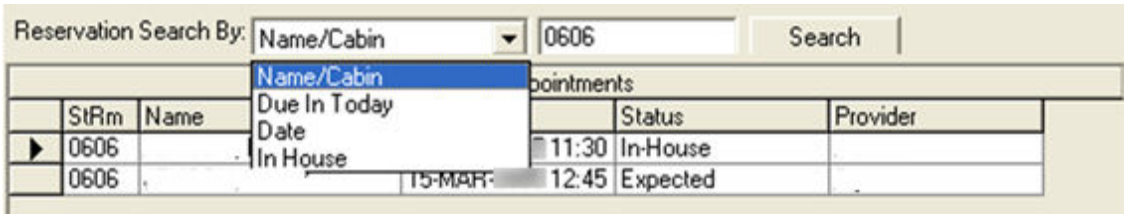


Query Appointments

Appointments can be queried by selecting a type of query to run, and then entering search criteria for that query.

The system supports query by Name/Cabin for checked in guests, query of all reservations due in today, all reservations due in on a specific date, and all guests that are currently marked as in the Spa.

Figure 5-9 Query Appointments



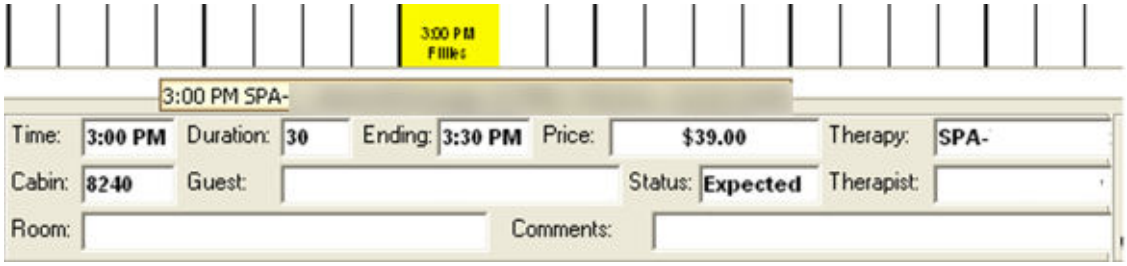
The appointment query is normally set to **Due In Today** so that the receptionist can easily take new reservations on other dates while checking in and completing appointments for today.

Viewing an Appointment Status

When you hover the mouse pointer over an appointment, the current information about that appointment appears in the selected **Appointment** Information frame.

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Figure 5-10 Status Appointment

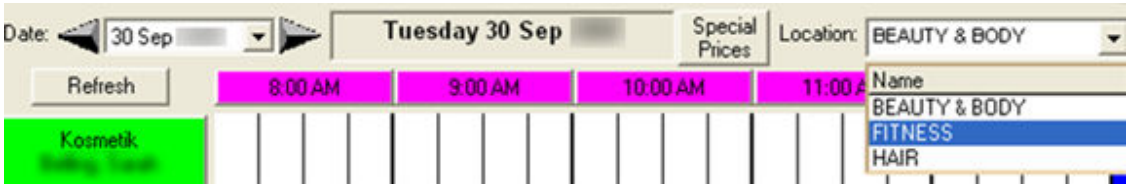


A tool tip also appears when hovering over your mouse cursor over an appointment with guest information.

Changing Locations

You can request a booking calendar for a different location by selecting the location for the **Location** drop-down combo box.

Figure 5-11 Changing Locations



Changing Dates

You can request a booking calendar for a different date by clicking the arrow buttons on each side of the date, or selecting a new date by clicking on the **date editor**.

Figure 5-12 Changing Dates



Changing Size of the Form

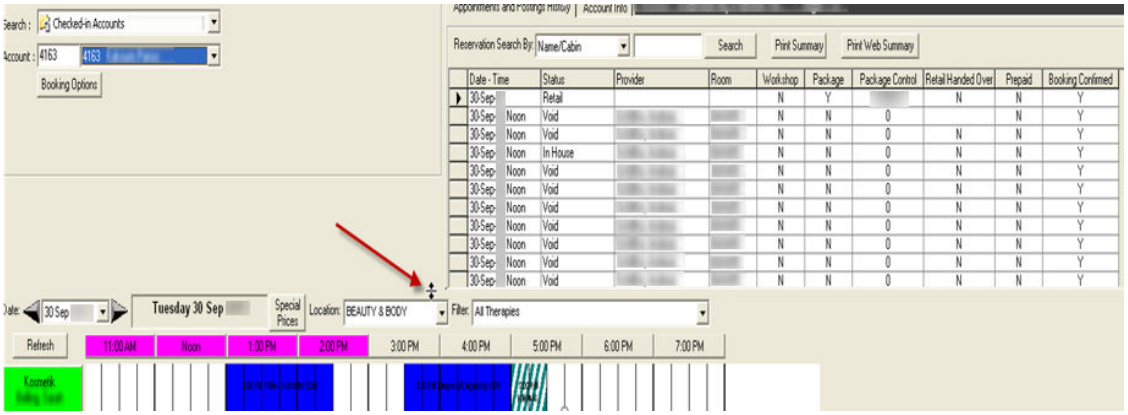
You can change the width of the Guest Selection frame and Appointment & Posting grid by placing the mouse pointer between the grids.

- When the pointer turns into a double-headed horizontal arrow, left-click and drag the mouse to adjust the size of the grids.

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- You can achieve a similar form sizing between the lower displayed Booking Calendar and upper Account Selection and Appointment & Posting History grid by placeing the mouse pointer just above the Date/Area/Filter labels.

Figure 5-13 Changing Size Form

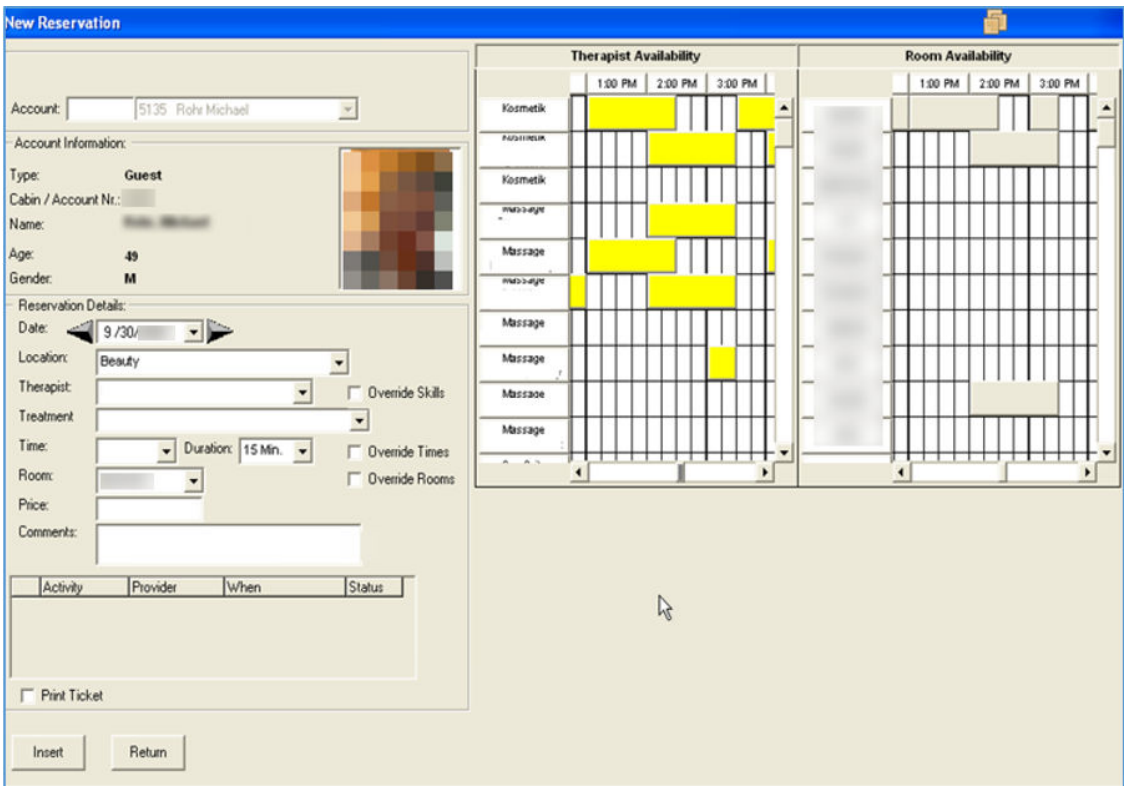


Making Reservations

To start the reservation process and display a new reservation form, do any of the following:

- Double-click on any white space on the Booking Calendar.
- Right-click anywhere on the Booking Calendar and select **Add Reservation**.
- Select a guest, click on **Booking Options** and select **Add Reservation**.

Figure 5-14 New Reservation



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On the left of the form is the information about the Guest and Treatment booked.

- If the guest is selected in the Guest selection, then the information for that guest is brought forward to this form.
- If the guest has any other Spa appointments, the guest and status are listed in the grid at the bottom.
- If the start of the reservation is from the Booking Calendar, the Therapist name and Time of the reservation, pre-fill based on where the Booking Calendar is selected.
- If no guest is pre-selected, the New Reservation form offers a similar Guest selection area so that you can select the correct guest for the upcoming Treatment appointment.

Table 5-11 Description of the Blocks that appear on the New Reservation Setup

Blocks	Description
Gray & Dark Green	Therapist is blocked during that time.
Yellow	Therapist already has an appointment during that time.
Lighter Green	Current selected time and duration for the appointment.

Performing Overriding Skills

Select the **Override Skills** check-box. Answer **Yes** to “Load all treatments regardless of skills?”

Performing Overriding Times

1. Click on **Override Times** check-box.
2. Select **Treatment, Time and Duration** and **Room assignment** for the appointment.
3. Click **Insert**.
4. If the Print Ticket checkbox is checked, the system sends a reservation ticket to the ‘Ticket’ printer.

Editing Reservations

To make a change to an existing reservation, right-click on the reservation on the Booking Calendar.

1. Select **Edit Reservation** from the context menu,
2. Alternatively, search for the appointment using the **Reservation Search By** area, select the appointment to be changed, right-click and select **Edit Reservation** from the context menu.
3. Make any required changes to the reservation and click **Update** to store the change into the database. When the form closes, any changes reflect in the Booking Calendar. If the **Print Ticket** checkbox is checked, a revised reservation ticket prints to the Ticket Printer.

> **Note**
>
> Only Expected Reservations can be edited. The current information about the reservation appear in the **Edit Reservation** form.

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Checking-In Reservations

1. Right-click on the reservation in the Booking Calendar.
2. Select **Check In** from the context menu.
3. Alternatively, search for the appointment using the Reservation Search By area, select the **appointment** to be check in, right-click and select **Check In** from the context menu.
    - If the appointment includes a comment, the comment appears in a Message Box. The color of the reservation changes to match the In-House Appointment image.
    - If an Appointment is incorrectly checked in, it can be placed back into expected by right-clicking the appointment in the Booking Calendar or Appointments grid, and selecting UnCheckIn from the context menu.

Finishing Reservations

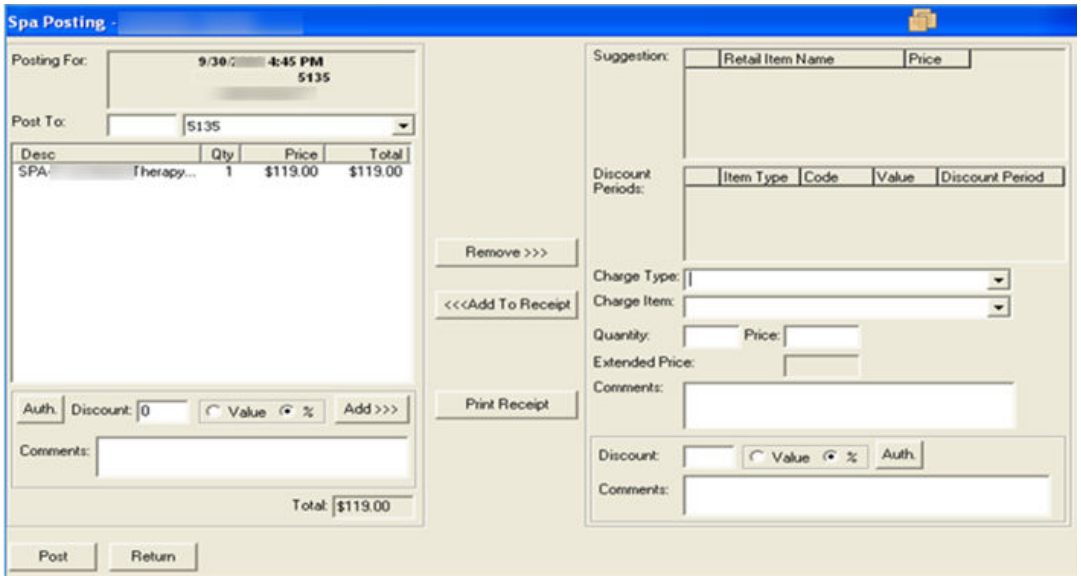
There are two ways to complete a reservation:

- Finish &Post>
- Finish without Posting>

Finish & Post (charges for the appointment to the selected account).

1. To **Finish & Post**, right-click the appointment on the Booking Calendar and select **Finish & Post** from the context menu.
2. Alternatively, search for the appointment using the Reservation Search By area, right-click and select **Finish & Post** from the context menu. At the Spa Posting Logon, either swipe the board card or enter the user-id/password into the form.
3. Click **OK**. Once the User ID and Password are accepted, the **Posting** form appears with the service and any associated retail items in the posting box.

Figure 5-15 Posting



To change where the charge will be posted (Payer Account), you can enter a new cabin, name or account in the **Post To** textbox, and a posting account is selected from the drop-down box.

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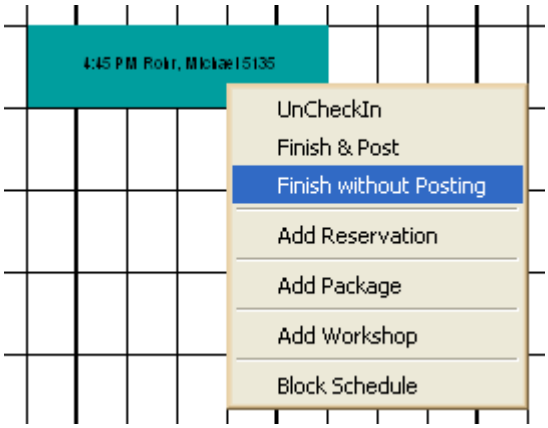
- If the Treatment of the reservation includes suggested retail items, they will appear in the **Suggestion** grid. Double-click on a retail item in the **Suggestion** grid to move it to the posting box. You can add additional charges for other services or retail products to the posting area by selecting a **Charge Type**, a **Charge Item**, entering a **Quantity**, and clicking the **Add To Receipt**.

Finish without Posting (any charges)

Finish without Posting allows you to complete the reservation without posting a change.

1. Right-click the appointment on the Booking Calendar and select **Finish without Posting** from the context menu.
2. Alternatively, search for the appointment using the Reservation Search By area, select the appointment, right-click and select **Finish without Posting** from the context menu. You will be prompted to confirm your selection with the following message: Are you sure you want to set the status of this Reservation to Finished without Posting it?

Figure 5-16 Finish Without Posting



Entering a Tip

On some vessels, it may be normal for the guest to be given a receipt prior to posting the charges to the system so that a tip can be entered.

1. Click **Print Receipt** to print a receipt of all pending charges to the **receipt** printer. The receipt is given to the guest for signature and to capture the tip amount prior to posting.
2. Select the **Charge Type of Miscellaneous** and the **Charge Item of Tip**.
3. Enter the Tip amount from the signed receipt.
4. The Spa Posting form automatically calculates the Treatment and Retail discounts based on the start time of the appointment and the discount times set up for the day. Authorized users can change the price or discount percent on any item added to the posting area.
5. To remove a charge from the posting, select it in the **Post To** area, and click **Remove**.

> **Note**
>
> If the **Return** is selected, additional charges added to the posting area will be removed, and will have to be re-entered the next time the **Finish and Post** option is selected for that Appointment.

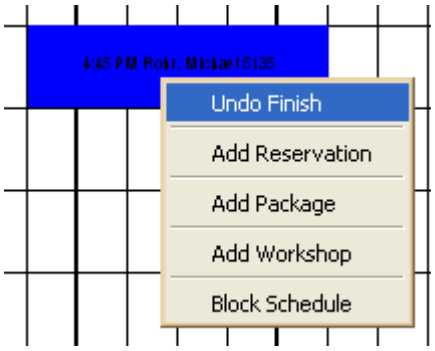
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Undoing Finish Option

Once an appointment is finished, you have the option to revert the Check in Status of an appointment using the Finish without Posting option, similar to the Void a Posting.

- Click the **Print Receipt** to print a receipt of all pending charges to the **receipt** printer. The receipt is given to the guest for signature and to capture the tip amount entered.
  1. Right-click on the appointment and select **Undo Finish**.
  2. Click **OK**.

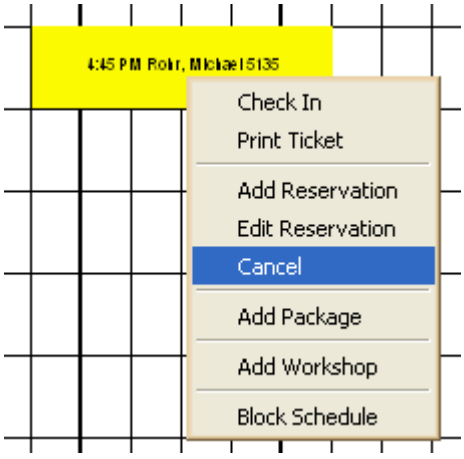
Figure 5-17 Undo Finish



Cancelling Appointments

1. Right-click the appointment from the Booking Calendar.
2. Select **Cancel** from the context menu.
3. Alternatively, search for the appointment using the Reservation Search By area, select the appointment to cancel, right-click and select **Cancel** from the context menu.

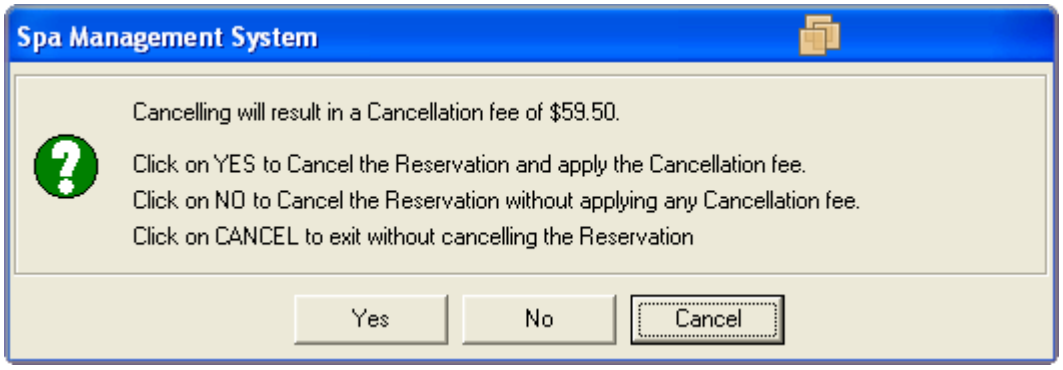
Figure 5-18 Cancel



4. If the reservation is within the cancellation period based on the cancellation rules, a message displaying a warning that a cancellation feel will apply.

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Figure 5-19 Cancellation Fee

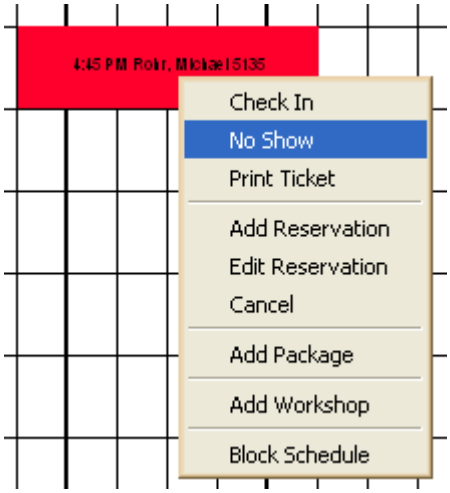


5. If you select:
   - **Yes**, the cancellation fee appears on the Spa Posting form and is placed in the Posting Area.
   - **No**, the selected appointment is canceled without posting a Cancellation Fee.
   - **Cancel**, then the reservation will not be canceled.

No-Show Appointments

Once an appointment is late, the appointment on the Booking Calendar appears using the **"Late Appointment"** image.

Figure 5-20 No Show

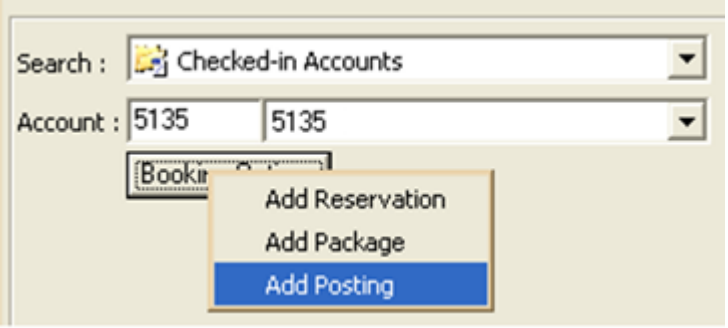


1. Click on **No Show**.
2. If you select **Yes** the No Show fee is calculated and placed in the Posting Area. You can then adjust the fee if required and post it to the guest account.
3. If you select **No**, the appointment is set to No Show without a charge. If you to click **Cancel**, then the reservation will not be canceled.

Posting Services and Retail without a Reservation

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Figure 5-21 Add Posting



1. Select the appropriate guest, click **Booking Options**, and select **Add Posting**.
2. Swipe your board card or enter the user-id/password, click **OK**.
3. Select **Charge Types** and **Charge Items** from the drop-down list, add them to the Posting Area, and post the transaction.

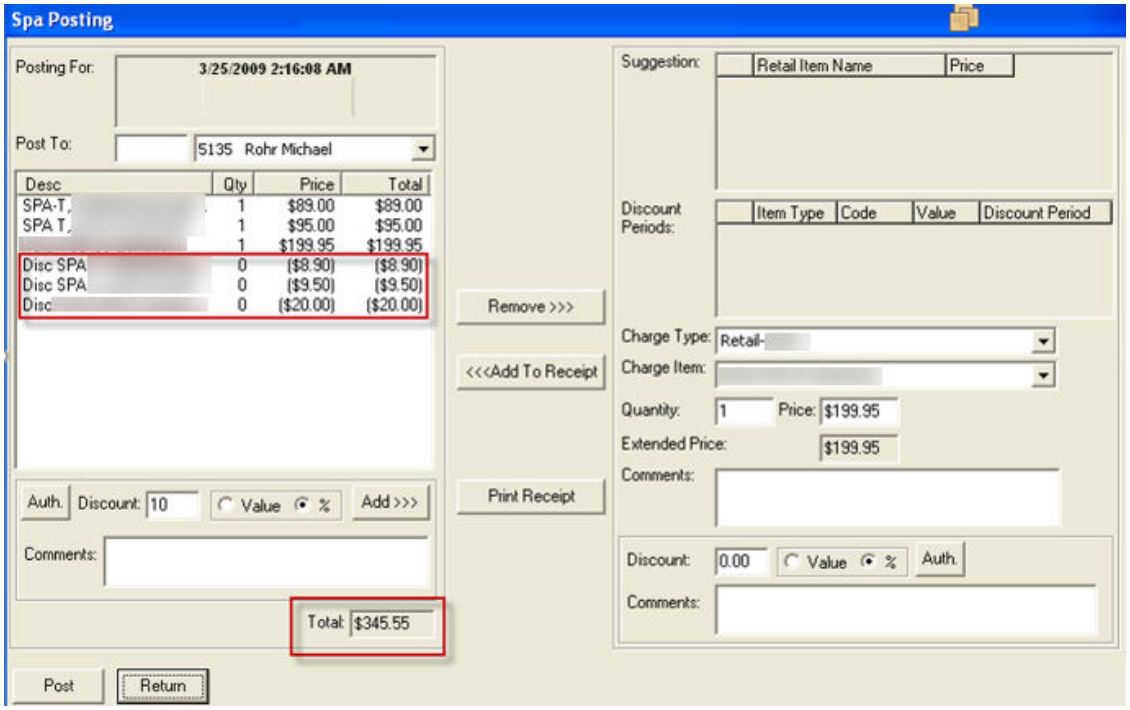
Ability to Assign Discount Percentage on the Entire Invoice During a Posting Process

In addition to adding a Discount Percentage on a per item basis before clicking the **Add To Receipt**, you can also apply a Discount Percentage to all items listed.

- By default, the Discount Percentage textbox is disabled, as with the right side of the Discount Percentage textbox, and is enabled if you have the User Access Rights checked after clicking the **Auth**.
- After the user is verified, the Discount Percentage textbox gets enabled to accept valid Discount Percentage values (0-100).
- Only after those values are verified as correct, the **Add>>>** button is enabled. Click the **Add>>>** button to start the process of applying a 10 percent discount on all items.

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Figure 5-22 Spa Posting



The above figure shows a 10 percent discount is applied to all three listed items in one easy step. The system only allows you to apply the discounts as long as there are no other discounts already applied, this way or the existing way from the right side of the screen.

For example, in a case where you applied a 10 percent discount to all three items, clicking the **Add>>>** button again results in the following warning message “Discounts already exist! Adding more Discounts not possible.”

When the Discount percentage is correctly applied, clicking **Post** posts all items with their Discount Percentage values into the Accounts. The Billing Image of this posting is viewable in Management.

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Figure 5-23 Bill Details



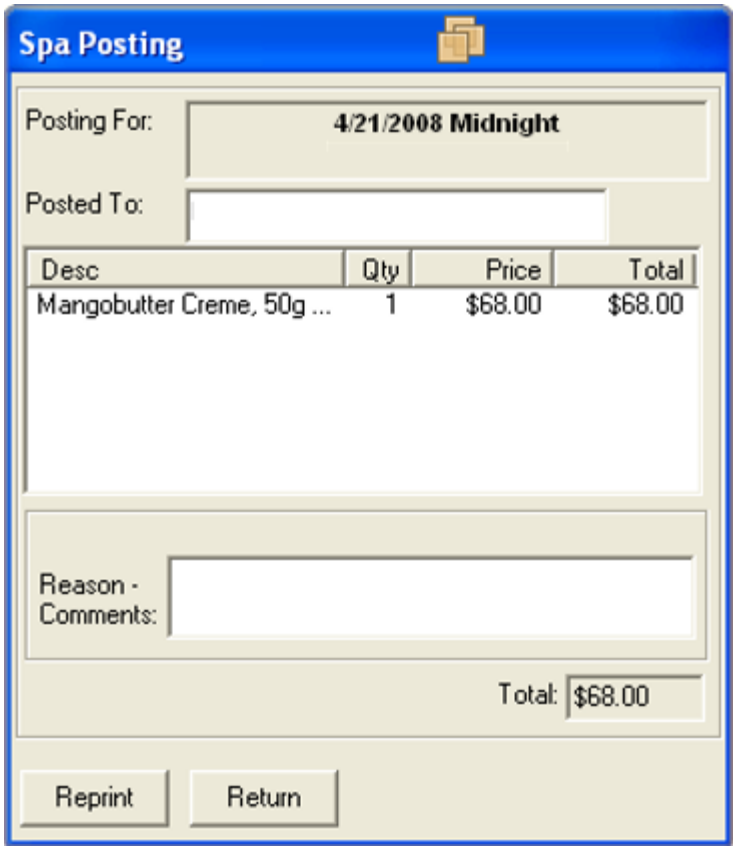
Viewing a Posting

To view a posted appointment or retail sale, select the appointment from the Appointments Grid or Booking Calendar. Right-click and select **View Posting** from the context menu. The Spa Posting form displays all of the details for the posted appointment.

Once displayed, the receipt for the posting can be reprinted by clicking **Reprint**.

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Figure 5-24 Spa Posting (View)



Voiding a Posting

To void POS transactions for an appointment, a retail sale or a cancellation/no show fee, select the **appointment** from the Appointments Grid or the Booking Calendar, right-click, and select **Void Posting** from the context menu.

The Spa Posting form will display the information needed to void the posting. When you click the **Void**, all charges are reversed and the appointment is marked as a status **"V"** for Voided. If the posting was for a true appointment, the new appointment record is created with a status of **"I"** for **In-House**.

Blocking Time

Blocked Time represents time when a therapist is not available to take appointments.

There are four types of Blocking Time:

- Free Time.
- Working Time.
- Security Control.
- Internet Block.

To distinguish these different Blocked Time options in the screens where the schedules are displayed, the following colors are used.

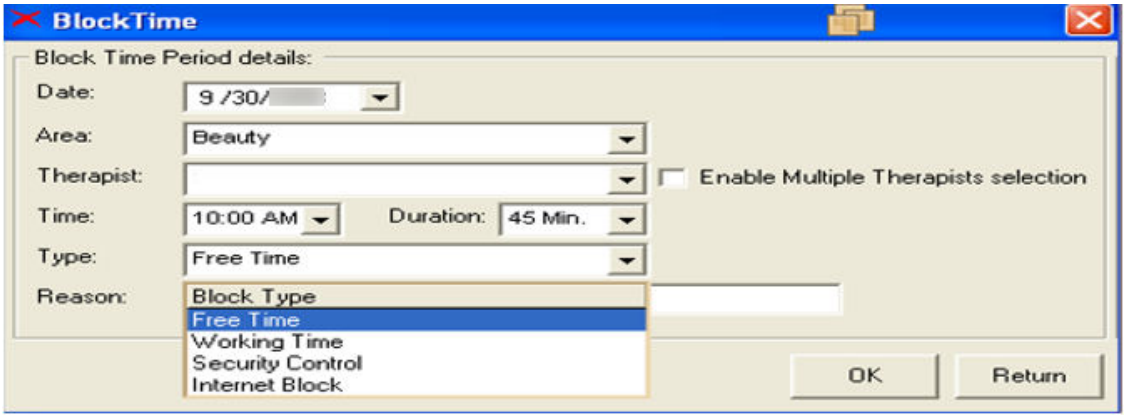
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Table 5-12 Description of the Blocks that appear on the New Reservation Setup for Blocked Time

Block Colors	Description
Original Gray	Free Time.
Dark Gray	Working Time.
Dark Green	Security Control.
Black	Internet Block.

On the Reservations screen, where a lot of information is displayed, the Working Time Type appears in a dark gray color with white fonts. To enter a blocked time, right-click on the **Booking Calendar** and select **Block Schedule** from the context menu.

Figure 5-25 Block Time



Quick Time Blocking

Quick Time Blocking provides the ability to define the same Time Blocks for multiple Therapists in one process.

1. You must select the **Enable Multiple Therapists selection** checkbox to expand the Block Time form and display the Multiple Therapists assignment list box.
2. Once you have selected all necessary Therapists, click **OK** to automatically create all Blocked Times for all selected Therapists.

> **Note**
>
> Ending a Blocked Time schedule is only allowed on a one to one Therapist basis.

Multiple Reservations — Workshops

Workshops are defined as specific Group Treatments, such as Yoga, Walking and Aerobic or Hairstyling workshops, where multiple participants (Attendees) are assigned.

Similar to regular Spa Reservations, Workshops are handled in the daily schedule as appointment blocks using the following options:

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Table 5-13 Description of the Multiple Reservation Workshops Overview

Option	Description
Add Workshop	Create the original Workshop Reservation.
Edit Workshop	Add or remove Workshop Attendees.
Check-In / Un-Check-In Individual Workshop Attendees	Check-In or Un-Check-In Individual Workshop Attendees as they show up.
Cancel Workshop	Cancel entire Workshop with the option to apply Cancellation Fees to all or selected Workshop Attendees (supports Cancelling Workshops without any Cancellation Fee posting).
No Show Workshop	No Show entire Workshop with an option to apply No show Fees to all or selected Workshop Attendees (supports the No Show Workshop without any No Show Fee posting).
Finish & Post Workshop	Finishing the Workshop with the option to apply the Workshop therapy amounts to all or selected Workshop Attendees.

To distinguish between regular Guest Reservations blocks, and Workshop Reservations blocks, you can use the same colors but different styles.

Figure 5-26 Workshops



Since there is limited space to display all Workshop participants in the Daily schedule block, the Workshop Reservation block contains the following information:

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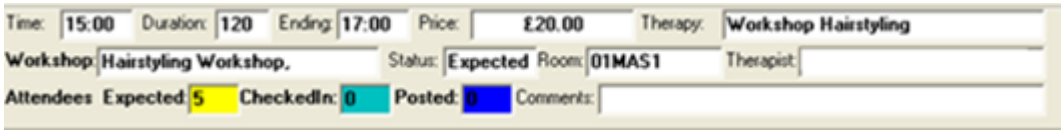
Figure 5-27 Workshop Hairstyling



Hover your mouse pointer over the Workshop Reservation block to display the following information in the tool tip text as shown in the above figure.

Another way of displaying more detailed information about each Workshop Reservation is at the bottom of the Reservations screen, where an enhanced Workshop Information area is created to display all Workshop relevant data when hovering the mouse pointer over the Workshop Reservation block.

Figure 5-28 Workshop Reservation



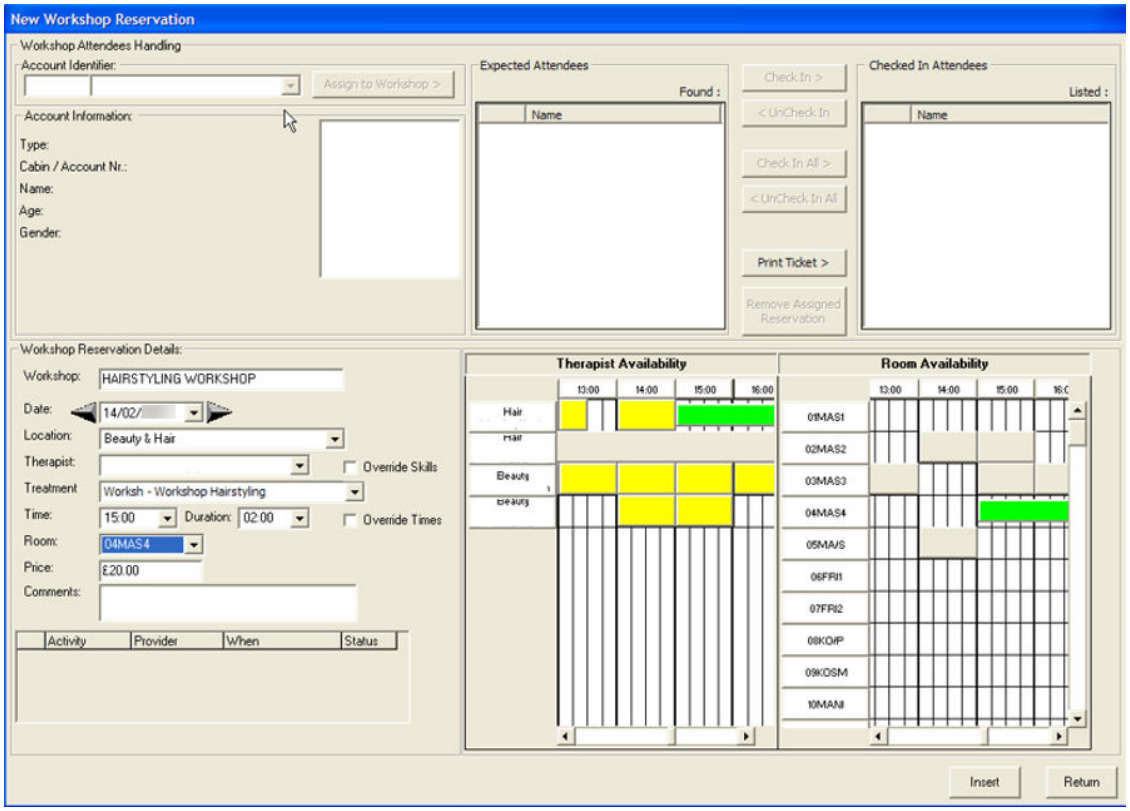
For a detailed listing of all Workshop Reservation related data as well as the Workshop participants, the above described Edit Workshop option appears all necessary information related to the selected Workshop.

Similar to regular Spa Reservations, you can create Workshops by selecting the option **Add Workshop** from the right-mouse click context options.

The New Workshop Reservation screen that opens is similar to the regular Spa Reservation screen with additions to handle Workshop specific requirements.

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Figure 5-29 New Workshop Reservation



It is not mandatory to assign a description to the main reservation time plan of the workshop or the treatment description.

- An account selection area created to search for Accounts and assign them to the workshop.
- A list box displays all Expected Workshop Attendees as well as Checked In Attendees.

Within the two (2) list boxes, the following options are available:

- Check In and Expected Attendee.
- Check In All listed Expected Attendees in one single step.
- Un-Check In a selected Checked In Attendee.
- Un-Check In all listed Checked In Attendees in one single step.
- Remove selected Expected Attendee from Workshop.
- Print individual Workshop Tickets for selected Checked In Attendees.

When you first create a Workshop Reservation using the Add Workshop option, you can only create the Workshop Reservation during the initial creation. You need to create the Workshop Reservation before you can the necessary options to control the Workshop attendees such as assign Attendees, Check In Attendees, and Un-Check In Attendees.

In the example shown in the screenshot above, a Workshop is created with the description “Hairstyling Workshop”. Then, you can select the appropriate Treatment and, Workshop Hairstyling, and assign the correct starting time and Room. When ready, click the **Insert** button.

The Workshop created will appear in the main Reservations time plan.

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Figure 5-30 New Attendees



There are still no Attendees assigned, therefore values for Assigned / Checked In / Posted attendees are zero.

Editing Workshop Reservations and Assigning Attendees into Workshops

To assign the necessary Workshop Attendees,

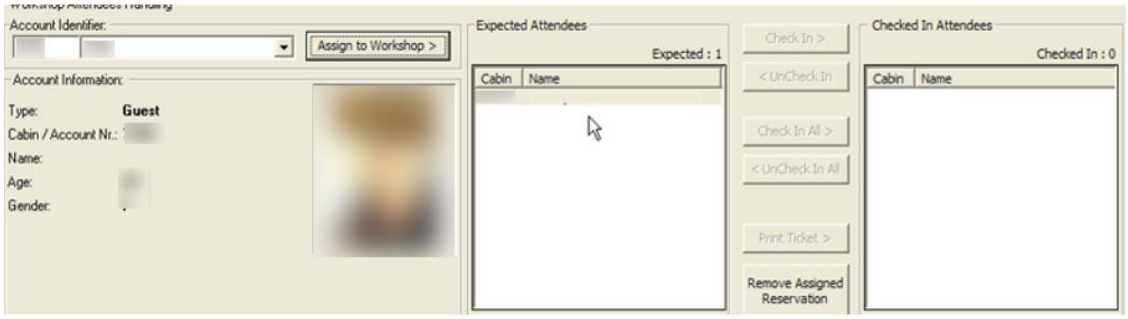
1. Right-click over the Workshop Reservation and select **Edit Workshop**. The Edit Workshop Reservation screen that opens is the same as the one you used before to create the Workshop Reservation except that you can now assign Attendees to the Workshop.

   You can also review and change all Workshop Reservation related information from within this screen. The cursor is positioned at the **Account Identifier** field and is ready to search for Accounts.

2. Select the appropriate account and click **Assign to Workshop**.

3. The selected Account is moved to the Expected Attendees list box and the Expected Attendees count shows the number 1.

Figure 5-31 Workshop Attendees Handling



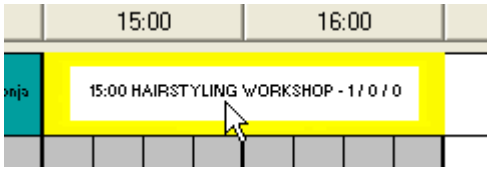
You can also assign more Accounts at the same time, assuming that you know other guests that would like to participate in this Workshop or you could assign them later.

> **Note**
>
> The Remove Assigned Reservation option becomes available once you have an Attendee assigned to the Workshop. You can remove an Attendee you select from the Expected Attendees list box, if you want to correct a wrongly entered assignment.

To edit Workshop Reservation data, click **Update** to save the Workshop Reservation related data you just updated. This addition of the first attendee is reflected in the Workshop Reservation block.

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Figure 5-32 Expected



This is also shown in the Workshop Reservation data.

Figure 5-33 Expected Workshop



You can assign more Attendees by following the below steps:

1. Right-click the **Workshop Reservation** and select **Edit Workshop** from the context menu options.
2. Select the appropriate account and click **Assign to Workshop**.
3. Click **Return** to close the Edit Workshop screen.

Checking-In Workshop Attendees

After all the Attendees are successfully assigned to the Workshop as Expected, you can check them in using one of these options:

Checking in all the Workshop Attendees in one single step.

1. Right-click the booking menu and select the first option, **Checkin Entire Workshop** to automatically check in all workshop attendees.
2. Confirm your selection by answering **Yes** in the context message.
3. The system automatically checks in all Expected Attendees and the Main Reservations time plan is being refreshed to reflect this change.

Checking in each Attendee manually.

1. Select the option **Checkin Workshop Attendees**.
2. This opens the Edit workshop reservation screen, where all Expected Attendees are listed in the appropriate Expected Attendees list box. The buttons **Check In >** and **Check In All >** are enabled to allow you to check in specific or all Expected Attendees. Selecting the correct name from the Expected Attendees list and clicking the Check In button does the following:
   - Checks in the selected attendee and moves it into the appropriate Checked In Attendees list box.
   - Removes the selected attendee from the Expected Attendees list box.
   - While checking In the Workshop Attendees, the Edit Workshop Reservation screen allows you to complete any of the following tasks that you might want to do.

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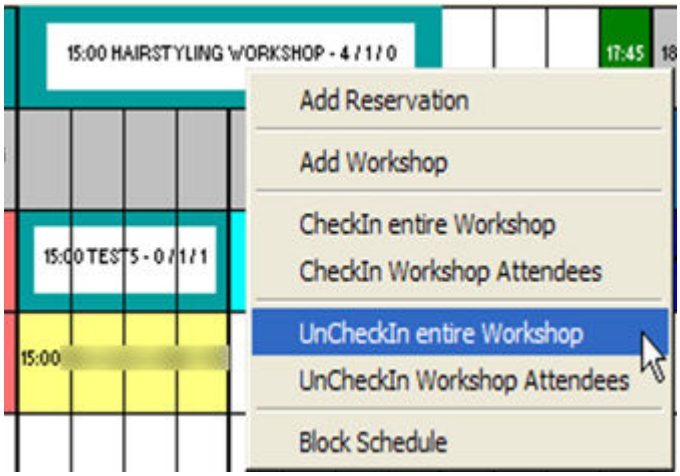
- Selecting and assigning new attendees into the Workshop by using the Account Identifier search capability as well as using the **Assign to Workshop**.
- Removing already assigned attendees from the Workshop, by selecting the **Remove Assigned Reservation** for a selected Expected Attendee.
- Editing Workshop Reservation related data, such as Room, Starting Time or Comments.

3. Click **Return** to close the Edit Workshop screen and go back to the Main Reservations time plan. Remember to click **Update** in case you have performed any changes in the other Workshop Reservation related data that needs to be saved.
4. The Workshop reservation block reflects the status change of the first Checked in Attendee.

Un-checking In Workshop Attendees

If there are situations where you would like to Un-Check In some or all of the Workshop Attendees, below are the available options for Un-Checking In all the Workshop Attendees in one single step.

Figure 5-34 UnCheck Entire Workshop



1. Selecting the first option **UnCheckIn** entire Workshop will automatically uncheck-in all the attendees.
2. Confirm the selection by selecting **Yes** in the context message.
3. The system automatically un-checked in the Expected Attendees and the Main Reservations time plan is refreshed to reflect this change.

> **Note**
>
> Due to all Attendees status being updated to Expected, the entire Workshop Reservation block also turned Yellow to reflect the overall Workshop Expected status.

To manually uncheck each attendee:

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1. Select the UncheckIn Workshop Attendees option. The Edit Workshop Reservation screen shows the Expected Attendees (listed in the appropriate Expected Attendees list box) and the Checked In Attendee (listed in the appropriate Checked-In Attendees list box), if any.
2. Select one of the Checked-In Attendees from the Checked-In Attendees list and click **UncheckIn** and move it into the appropriate Expected Attendees list box. This removes the selected Attendee from the CheckedIn Attendees list box.

> **Note**
>
> The **< UnCheck In** and **< Un Check In All** buttons become unavailable when there are no any attendees in the list.

In the process of Un-Checkin the Workshop Attendees, the Edit Workshop reservation screen still allows you to complete any of the following tasks:

- Selecting and assigning new Attendees to the Workshop by using the Account Identifier search capability as well.
- Removing already assigned Attendees from the Workshop Use the Remove Assigned Reservation for a selected Expected Attendee to remove an assigned attendee.
- Editing Workshop Reservation related data, such as Room, Starting Time, or Comments.

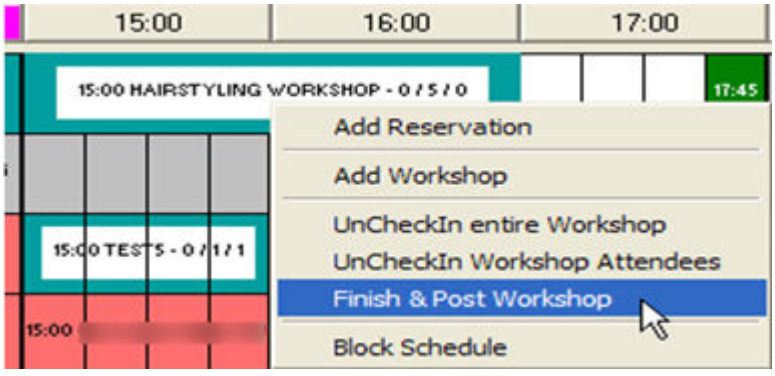
3. When finished click **Update** and then the **Return** to close the Edit Workshop screen to ensure that the changes you have performed in other Workshop Reservation related data is saved. The Workshop Reservation block reflects the status change of the first Checked In Attendee back to Expected.

Finishing & Posting the Entire Workshop

When the Workshop is completed, the system gives you the option to assign it as **Finished** and post the appropriate Treatment fees into the Attendees accounts.

To Finish & Post a Workshop reservation, right-click and select the **Finish & Post Workshop** option.

Figure 5-35 Finish & Post Workshop



The Spa Workshop Posting screen is similar to the regular Spa Posting screen with additions to handle Workshop specific requirements.

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- An accounts information area where information is displayed for every selected Workshop Attendee.
- There are list boxes that displays all Checked In Workshop Attendees as well as all Finished & Posted Attendees.

Within the two list boxes, there are buttons that give the options to:

- Finish & Post only selected Checked In Attendee.
- Finish & Post All listed Checked In Attendees in one single step.

In this example, the Hairstyling Workshop lists five Checked In Attendees that you would like to charge the displayed Workshop Hairstyling treatment charge of $20.00.

If the **Post** button is disabled, this means you must select any of our five Checked In Attendees to assign them as Finished.

To do so, click the **Finish & Post All >** button which will result in the following:

- Mark all five (5) Attendees as Finished and list them into the appropriate Finished Attendees list box.
- Removing all five (5) Attendees from the Checked In Attendees list box.

As soon as a minimum of one attendee appears in the Finished Attendees list box, the **Post** button becomes available and you can post the $20.00 Treatment charge.

Click on the **Post**, as with regular Spa Reservations Postings.

1. Posting the defined Workshop Treatment charge to each Attendee account.
2. Print a posting receipt for each Attendee account.
3. Assign each Attendee account to Finished status.
4. Assign the complete Workshop Reservation to Finished status.
5. As soon as the above actions are completed, the Spa Workshop Posting screen closes and the system refreshes the Main Reservation time plan and sets the Workshop status to Finished.

Figure 5-36 Finished

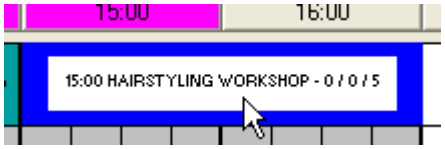


Figure 5-37 Finished Workshop



Finishing & Posting Selected Workshop Attendees

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Apart from the above steps, the system also provides the option to Finish & Post each workshop attendee singularly, as guests register at the Spa Reception desk, by selecting the same option Finish & Post Workshop from the context menu.

To complete the posting for the selected attendee, right-click on the Checked In Attendees list box and select **Finish & Post >**.

This will:

- Mark the selected Attendee as Finished and list it into the appropriate Finished Attendees list box.
- Remove the Attendee from the Checked In Attendees list box.

Clicking on **Post** as with regular Spa Reservations results in:

- Posting the defined Workshop Treatment charge to the one listed Finished Attendee account.
- Printing a posting receipt for this Attendee account.
- Assigning only this Attendee account to Finished status.
- Assigning the complete Workshop Reservation to **Finished** status.

As soon as all of the above actions are completed, the system refreshes the Main Reservation time plan with the Workshop status change to **Finished**and closes the screen.

> **Note**
>
> The Workshop Reservation block will maintain the Blue & Cyan color combination until all Workshop Attendees have been Finished & Posted.

Viewing Workshop Postings

Other than finishing and posting the workshops, you can also **View Workshop Postings** for reviewing purposes as well as reprinting of receipts.

1. Select a Finished Workshop to view its postings and select the option **View Workshop Postings** from the context menu. This option opens the View Spa Workshop Postings screen in three different areas.
   - An accounts Information area where you get information for every selected Workshop Attendee.
   - The Finished Attendees list box that displays all Workshop Attendees that have been marked as Finished.
   - The Postings List that lists all posted transactions as part of the current Finished & Posted Workshop of each selected Finished Attendee.
2. Click on **Reprint** to reprint the Posting Receipt for the current selected Finished Attendee.

Voiding Workshop Postings

As with Viewing Workshop Postings that have been Finished & Posted, the following functionalities are for Voice Workshop Postings.

1. Select the **Finished Workshop** to view its postings and select the option Void Workshop Postings from the context menu.

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2. This option opens the Void Spa Workshop Postings screen in three different areas.
    - An accounts information area where you get displayed information for every selected Workshop Attendee.
    - The Finished Attendees list box that displays all Workshop Attendees that have been marked as **Finished**.
    - The Postings List that lists all posted transactions as part of the current Finished & Posted Workshop of each selected Finished Attendee.
3. Clicking **Void** voids all of the listed Transactions posted as part of the current Finished Workshop for the current selected Workshop Attendee and prints a Void Receipt.

Deleting Workshop Reservations (No-Shows)

If for any reason the entire Workshop Reservation has not shown up and are marked as late in the Main Reservations time plan (Red color), the system provides the necessary option to define this Workshop as No Show.

The No Show definition gives you the option to:

- Define the Workshop Reservation as No Show and charge the predefined No Show fee to all or selected attendees accounts.
- Define the Workshop Reservation as No Show without charging any No Show fees to the Attendees accounts.

To define a Workshop reservation as No Show,

1. Select the option No Show Workshop from the context menu. The system displays a confirmation message.
2. Click **No** to delete the entire Workshop Reservation and reflect in the Main Reservation time plan. Click **Yes** to open the Spa Workshop Posting screen, which allow you to charge the predefined No Show Fee to the Workshop Attendees It also provides:
    - An accounts information area where you get information for every selected Workshop Attendee.
    - List boxes that display all Expected Workshop Attendees as well as No Show & Charged Attendees.

Within the two list boxes, the following options are available:

- No Show & Post only selected Expected Attendees.
- No Show & Post All listed Expected Attendees in one single step.
- The predefined Treatment No Show Fee is listed and ready to be charged.

To proceed with charging the No Show Fee to the Workshop Attendees,

1. Select some or all of the Expected Attendees.
2. Click the **No Show & Post >** to move Expected Attendees into the Attendees To Be No Show & Posted list box.

> **Note**
>
> If you select only a few attendees, the remaining attendee's status will change to No Show without a charge.

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Clicking on the **Post** will:

- Post the predefined Treatment No Show Fee to the two Attendee's accounts listed in the Attendees to be No Show & Posted list box.
- Print posting receipts for both Attendee's accounts.
- Assign those two Attendee's accounts to No Show & Posted status, and the rest to No Show status.
- Assign the complete Workshop Reservation to No Show & Posted status.

The Spa Workshop Posting screen closes and the system refreshes the Main Reservation time plan with the Workshop status changed to No Show & Posted (the Workshop Reservation block is appears in blue to indicate that something has posted to the Attendee's accounts. This way you still have the options to View & Reprint as well as Void those posted transactions.

Cancelling Workshop Reservations

If for any reason the entire Workshop appointment needs to be cancelled, right-click from the **Booking Calendar** and select **Cancel Workshop** from the context menu.

1. If the reservation is within the cancellation period, based on the cancellation rules, a message warns you that a cancellation fee will apply.
2. As with the regular reservations, the Cancel definition gives you the option to:
   - Define the Workshop Reservation as Cancelled and charge the predefined Cancellation fee to all or selected Attendee accounts.
   - Define the Workshop Reservation as Cancelled without charging any Cancellation fees to the Attendees' accounts
3. Answering with **No** results in Cancelling & Deleting the entire Workshop Reservation and this reflects the same moment into the Main Reservations time plan.
4. Answering with **Yes** opens the Spa Workshop Posting screen, which has been updated to handle the requirements for charging the predefined Cancellation Fee to the Workshop Attendees. The Spa Workshop Posting screen now shows:
   - An accounts information where you get information for every selected Workshop Attendee.
   - List boxes that display all Expected Workshop Attendees as well as all Cancelled & Posted Attendees.
5. Within the two list boxes, the following options are available:
   - Cancel & Post only selected Expected Attendees.
   - Cancel & Post All listed Expected Attendees in one single step.
   - The predefined Treatment Cancellation Fee is already being listed and ready to be charged.
6. Clicking on the **Post** results in:
   - Posting the predefined Treatment Cancellation Fee to the two Attendees account listed in the Attendees To Be Cancelled & Posted list box.
   - Printing posting receipts for both Attendees account.
   - Assign those two Attendee account to Cancelled & Posted status and the rest to Cancelled status.
   - Assign the complete Workshop Reservation to Cancelled & Posted status.

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As soon as all of above actions are completed, the Spa Workshop Posting screen closes and the system refreshes the Main Reservation time plan with the Workshop status change to Cancelled & Posted (the Workshop Reservation block appears in blue color to indicate that something has been posted into the Attendee accounts. This way you still have the options to View & Reprint Receipts as well as Void those posted transactions.

Packages Handling

Similar to regular Spa Reservations, Packages are handled in the daily schedule as appointment block, with these options:

- **Add Package:** assign a specific package to an Account.
- **View/Edit Package:** assign a Reservation to a Package Treatment, edit a Package Treatment Reservation or assign Package Retail Items as Handed Over or Not Handed Over.
- **Cancel Package:** Cancel the entire package with all included Treatment Reservations with the option to apply Cancellation Fees to all Treatment Reservations.
- **No Show Package:** No Show the entire package with the option to apply No Show Fees to all Treatment Reservations.
- **Edit Reservation:** Update specific information of a Treatment Reservation that is part of a package.
- **Finish & Post:** Finishing a Packaged Treatment Reservation will result is posting the entire Package into the payer's Account.

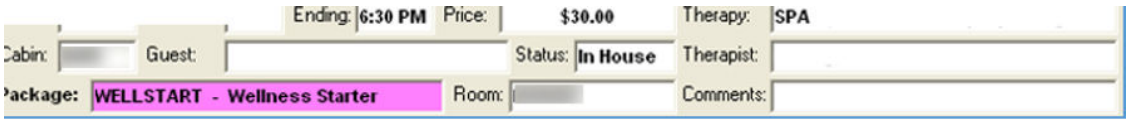
To distinguish between regular Guest Reservations blocks, Package blocks uses the same colors but a different style, as shown below:

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Figure 5-38 Packages Treatment



Another way of displaying more detailed information about each Package Reservation is the bottom of the Reservations screen, where an enhanced Package Information area displays package relevant data upon hovering with the mouse pointer over the Package Reservation block.



For a detailed listing of all Package Reservations related data, the above described **View Package or Edit Reservation** option will display all necessary information related to the selected Package block.

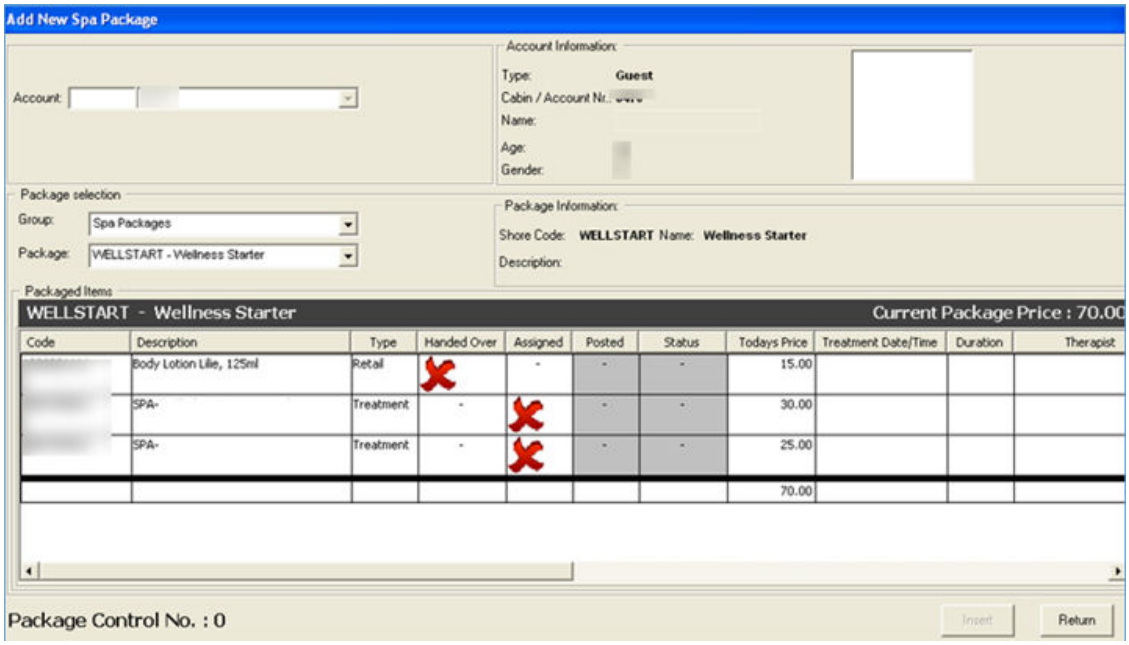
Assigning Packages to Accounts

Packages are assigned to Accounts by selecting the **Add Package** option from the context menu. Assigning Packages can also be achieved by clicking **Booking Options**.

The Add New Spa Package screen gives you the option to select certain Spa Packages from certain Package Groups.

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Figure 5-39 Add New Spa Package



As soon as a Spa Package is selected, all Items included are displayed, including the package's current price. All Treatment Items may appear as not assigned because there are not many Treatment Reservation created yet. To proceed with inserting the Package into the selected Account, the **Insert** remains disabled and you will need to assign all Package Treatment Reservations.

To do that,

1. Select each **Treatment Reservation** from within the grid and right-click to display the menu.
2. For Packaged Treatment, the new / Edit Reservation screen appears that you use for regular Treatments. You can select the **Date, Time** and **Therapist** to create the Packaged Treatment Reservation.
3. Click **Insert**, the Packaged Treatment Reservation is created and the Package Treatment Reservation creation in reflected into the Packaged Items grid.
4. The Treatment Reservation appears with Expected Status and lists all the Treatment Reservation information (Treatment Date/Time, Duration, Therapist, Room). Enable the Insert, and you can assign the current Spa Package into the selected Account.

Viewing & Editing Packages

Editing a Packaged treatment Reservation can be done in two ways:

- Using the known Edit reservation option from the context menu.
- Using the View Package option from the context menu. This option will open the known Edit Reservation screen which is now enhanced with Spa Packages related information.

Selecting any Treatment Reservation and right-clicking on it displays the context menu with the **Edit Reservation** available, where you can edit certain Treatment Reservation settings. Selecting any Retail Item and right-clicking on it, will display the context menu with the option to Hand Over the Retail Item to the customer.

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The following confirmation message appears “Are you sure you want to Hand over the selected Retail Item?”

Clicking on **Yes,** assigns the selected Packaged Retail Item as Handed Over and will refresh the relevant information into the data grid.

If any of the Package Treatment Reservations or the entire Package needs to be canceled, the system provides the necessary **Cancellation** options.

The available menu options are to either:

- Cancel the selected Package Treatment.
- Cancel the entire Package and all its included Treatment Reservations.

Upon selecting to **Cancel** the selected Package Treatment, the system will ask you to reconfirm the available options:

- Cancel all expected Treatment Reservations for this Package.
- Cancel the selected Package Treatment Reservation only.
- Cancel the selected Package Treatment only (click **No**).

The Cancel Selected Spa Packaged Treatment screen shows the following information:

- All Package Items (Treatments and Retail Items) listed with their Package Price as well as their Regular onboard Price.
- The Treatment selected to cancel marked with red and a Cancellation Fee price appears based on the existing Cancellation Percent value.
- At the lower left corner, detailed information about the necessary steps are performed to complete the Cancellation of the selected Treatment.

Cancelling the selected Packaged Treatment will result in restoring the entire Package to a non-Package status by performing the following actions:

- Void the entire Package with the Package Price.
- Re-Charge the already finished Package Treatments with Regular Price.
- Re-Charge the already handed over Package Retail items with Regular Price.

Update all expected Package Treatments with Regular Price.

At the lower right corner, these are the available user actions:

1. Click **Yes** to cancel the selected Packaged Treatment Reservation and apply the Cancellation Fee.
2. Click **No** to cancel the selected Packaged Treatment Reservation without applying any Cancellation Fee.
3. Click **Cancel** to exit without cancelling this package.

Unassigned Bookings Handling

The Unassigned Bookings Handling screen lists all single Treatment or Package Reservations imported through the Data Import module before they are confirmed and assigned a Treatment Room.

To ease the imported Reservations handling, the system provides separation of bookings by system Cruise.

The screen is divided into two main areas:

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1. **The Unassigned Cruise Bookings grid.**

   This grid lists all imported Cruise Treatments Reservations sorted by the scheduled Treatment Date & Time. You can modify the sorting order by clicking on the grid column headers.

2. **A smaller edition of the main Reservations & Schedules screen.**

   This screen displays all current (already confirmed) appointments for the selected date in the colour gray to distinguish those appointments from the unassigned appointments that you selected on the top grid. The system can process the appointment and propose the correct Therapist Schedule according to the predefined Treatment Date & Time.

Clicking on every imported unassigned treatment reservation initiates the internal process of finding the necessary available open time space that fits the booking's requested Treatment Date & Time, as well as the first available therapist. As soon as an available period is found, the system places the unassigned treatment reservation into the Reservations & Schedules time scale on the lower part of the screen, in the colour yellow to identify it as an Expected Appointments.

There are only two options available for the Unassigned Expected Appointments:

1. **Assign room and confirm booking**

   The Unassigned Treatment Appointment is ready to be confirm and added into the system as a regular Expected Treatment Reservation assigned to a valid and available date, time & therapist. The last step is to define the Treatment Room.

2. **Edit reservation**

   You can edit specific reservation data before confirming the booking.

> **Note**
>
> The System does not allow you to update the Treatment and Price for imported prepaid treatment Reservations.

As soon as you select the room and confirms the selected unassigned treatment, the treatment appears in the Reservations Schedule in the color gray similar to the rest of the regular bookings. At the same time, the treatment disappears from the Unassigned Bookings grid for the user to continue confirming the remaining unassigned bookings still listed in the grid.

If no availability for requested period found, the system places the unassigned treatment reservation into the first Therapist Schedule colored in red indicating the overlap with another existing appointment or time block. There is still the option to assign the appointment to another time and/or therapist, either by selecting Edit Reservation or by moving the red colored reservation block using the drag and drop method and positioning it to the desired available time and/or therapist.

Assigned Prepaid Bookings Overview

The Assigned Prepaid Bookings Overview screen provides a central place where you can print web summaries in a batch process using specific data filters as well specialized sorting options.

The printing Web Summaries for Prepaid Bookings can initiate for all bookings displayed on the screen as well as for a selected number of bookings (rows) using the combination of control keys (Ctrl and Shift) and a single mouse click.

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Daily Export

This is the option where the manager would generate the Daily Sales Export file at the end of the day. It can be used to import the Daily Items consumption into various Inventory systems like Materials Management System, Crunch Time, and so on.

The system displays the default preset file location where the Daily Export Sales file is placed upon completion of the export process. You must select the **Sales Date** and click on **Export**.

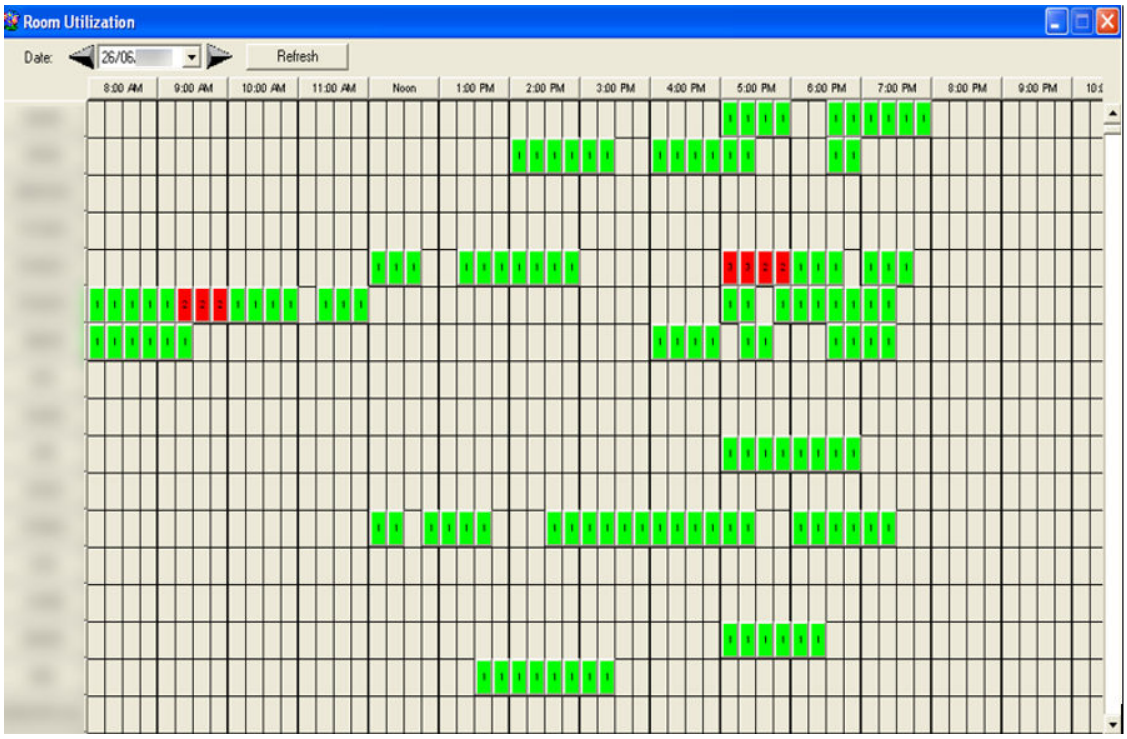
> **Note**
>
> Once the Sales Data is exported for a specific date, the Sales Data resets and the systems cannot reproduce Sales Data Export for the same date again.

Daily Schedule Overview

The Daily Schedule Overview screen is a graphical representation of the actual main Reservations screen using the same default colors to represent all Appointments and Time Blocks.

Room Utilization

Figure 5-40 Room Utilization



The Room Utilization screen is a graphical representation of the actual times each Treatment Room has been used during a sales date in the default fifteen (15) minutes time intervals.

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Daily Setup

Daily Setup Overview

The Daily Setup screen contains the following information:

- Location schedule information.
- Therapists schedule information.
- Discount Period setup and maintenance.

Before you can create a setup for a specific location and date, the system must have the information about the location – see Location Maintenance – as well as the therapists assigned to each location – see Therapists Setup

Location Schedule Information

The following information uses the Location Maintenance to prepare the daily setup with default values:

- Opening and closing times
- Schedules number
- Schedules captions

You can alter these default values to the values appropriate for each Daily Setup.

Additionally, you can enter the following information to appear in the main Reservations screen:

- Port Info
- Therapist Info

Therapists Schedule Information

In the same way as for Location Schedule, the appropriate therapists are loaded from the Therapists Setup into the Therapists drop-down selection boxes, allowing you to assign the appropriate therapist to each schedule at a later time.

Each displayed therapist’s schedule number color is similar to the main Reservations screen colors.

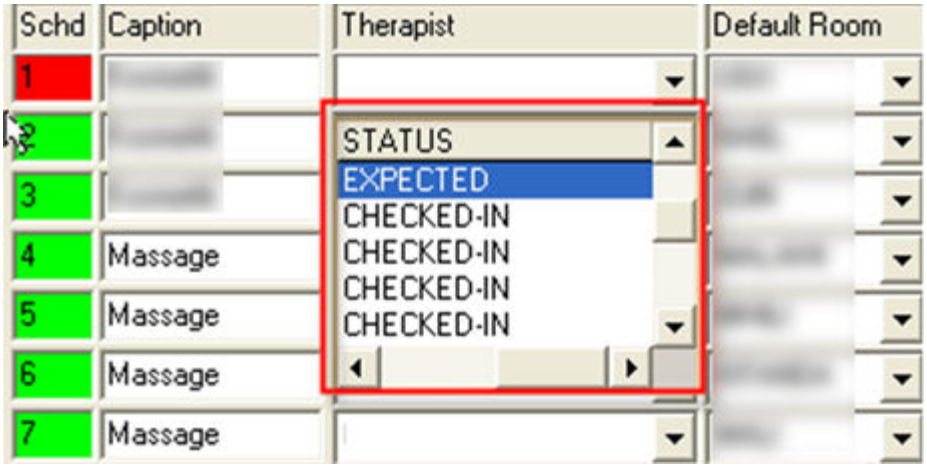
- **Red:** for Expected Therapists (and for schedules that are not link to any Therapists).
- **Green:** for Checked-In Therapists.

Each displayed Therapist's tool tip text shows either Expected or Checked-In next to the existing Expected Disembarkation Date.

Inside the Therapists drop-down selection box, you will find an additional Status column next to each therapist’s name (Expected or Checked-In).

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Figure 5-41 Expected Status



Next to each Therapist Schedule is an exact overview of the actual Booking Calendar of the selected date and location. The displayed time blocks have the following colors:

- The blocked times appear in the default gray / dark gray / dark green and black colors.
- All other Treatment Reservations (Expected and In House) are in yellow.

> **Note**
>
> Only Expected and In House Treatment Reservations appear here since this is a pure availability overview.

Multiple Discount Periods

This functionality extends the existing single Discount Period per Day into Multiple Discount Periods for each day in the Daily Setup screen.

Additionally, you can now define the selected or all Item Groups and/or selected or all specific Items (Retail and Therapies) that will be assigned to the specific Daily Discount period.

The default Discount percentage definition includes the options to define Discount Value or Discount Percentage.

Setting up a Day

To set up a Day, select the Location and Date from the calendar.

As soon as you click on the Calendar into a Date that does not exist as a Spa Location Daily Schedule, the system loads the default values for the Location as found in the Location Maintenance as well as in the Therapists Setup.

The default values loaded are:

- Number of Schedules
- Opening and Closing times

The system will create the Therapists Schedules with their default captions, loads all appropriate therapists into each schedule Therapist drop-down list box, and prepares them for further editing.

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The system also loads all available rooms into each Schedule's Default Room drop-down list box.

Having all this information in place, you can now edit each Schedule.

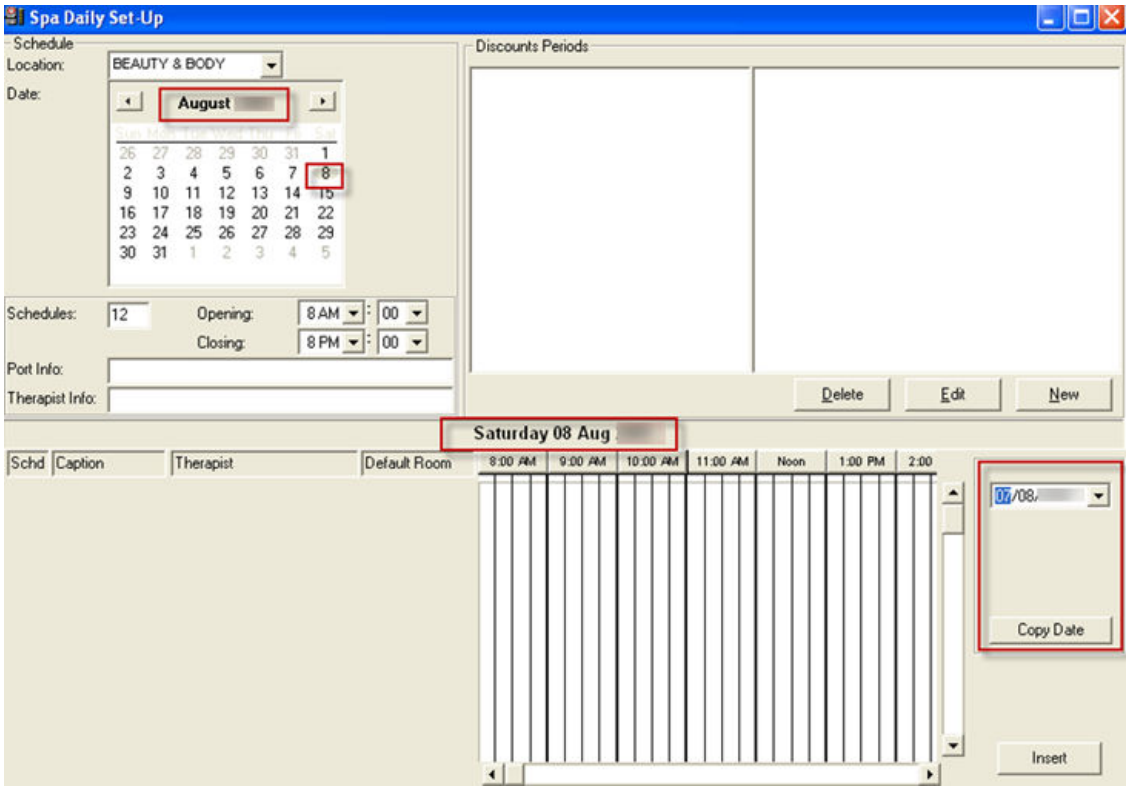
1. Accept the default schedule caption or edit it.
2. Select the correct therapist for each Schedule from the Therapist drop-down list box.
3. Select the default room for each schedule from the Default Room drop-down list box.
4. When done creating the schedule, click **Insert** to save it.

Copying a Previous Day

To avoid setting up each single working day, the system provides the functionality to set up a Day by copying the setup of an existing working Day.

Select the date you want to set up from the calendar. The system displays an empty Working Day as well as the option to select an existing Working Day and copy this day's setup into the selected empty setup.

Figure 5-42 Spa Daily Setup



Select the working date you want to copy the setup from and then click **Copy Date**.

The copy process begins immediately, and the date will have the same setup as the one you copied from.

Additionally, the system displays two more buttons: the Update button updates the proposed/copied setup, the Remove Date button removes the proposed setup.

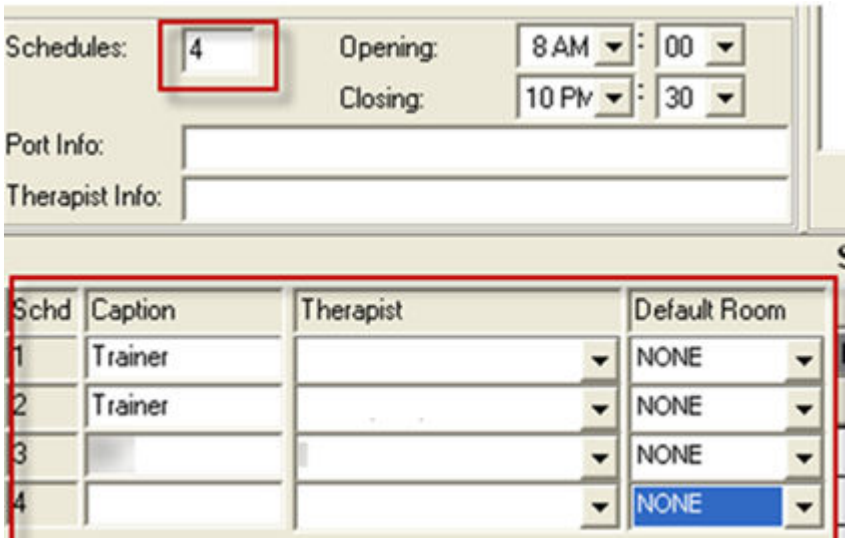
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Click on Remove Date to remove the Daily Setup for the selected day. The following appears **“Are you sure you want to remove the Daily Setup for selected Date: 08/08/2019”**

Adding and Removing Schedules

The function allows you to add additional schedules and therapist to the selected date.

Figure 5-43 Schedules



Place the cursor in the Schedules text box and replace the number as shown in above figure from four (4) with six (6) and click **Tab**. The system will create two additional schedules where you can enter their captions as well as select therapists and default rooms

After finishing all necessary changes, click **Update** to save. You can remove existing Schedules from a Daily Setup the same way, by reducing the Schedules number and clicking the **Tab** key. Clicking **Yes**, will remove the last two Schedules and reduce the total number of schedules for this working date to four.

> **Note**
>
> When you try to remove a Schedule that already has Appointments or Blocked Times assigned, the system will not allow it and will display the following warning message **“There are already appointments for one of the schedules you are trying to delete. Cannot continue.”**

Assigning Crew Member to Schedules

When adding Schedules into the Daily Setup, the system by default leaves the **Captions, Therapists**, and **Default Rooms** empty.

You can assign Therapists to those Schedules by selecting the therapist from the Therapist drop-down combo box and then clicking **Update**.

Multiple Discount Periods

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The Daily Setup screen displays all Multiple Discount Periods assigned to each day on the upper right. The Discounts Periods display the list of assigned Discount Periods and the Retail, or Therapy Groups and Items assigned to each Discount Period.

The main Discount Periods frame consist of two separate frames:

- A tree view listing of all Discount Periods grouped by Retail and Therapies types.
- A tree view listing of all Groups and items assigned to each Discount Period.

The necessary buttons needed to **Create, Edit** or **Delete Discount Periods**, are place at the bottom of the Discounts Period frame. The listing on the left lists all available Discount Periods of a selected date, including the following information:

- Short Code description.
- Discount value as amount of percentage (%).
- Starting and Ending time of the Discount Period.

The listing on the right displays all Retail or Therapies Groups and Items that are currently assigned to the selected **Discount Period** of the left side.

Creating and Editing Multiple Discount Periods

The assignment of Groups and Items works in the same way as the assignment of Trained Therapies in the Therapists Setup screen. You can assign to each Discount Period an entire Group of Items or selected Items.

This can be done during the creation of a Discount Period (**New**) or when editing an existing Discount Period (**Edit**).

To create a new Discount Period, click **New**. A new window opens where you can enter all necessary information to create a Discount Period.

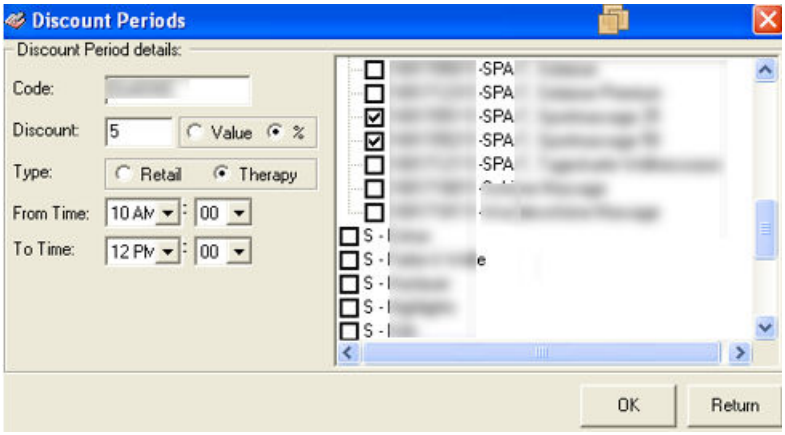
- **Code:** Enter a short description for the new Discount Period. This is used later to describe this Discount Period in the Reservations and Posting screen.
- **Discount:** Enter the amount of the Discount and its type: Value.
- **Percentage (%):** 2.50 or 10 percent.
- **Type:** Select whether this Discount Period will include Retail.
- **Therapies Items:** Clicking on each type results in automatic loading of Retail or Therapies Groups and Items on the right side tree view listing.
- **From Time:** Enter the starting time of the Discount Period.
- **To Time:** Enter the ending time of the Discount Period.

On the right side of the window, you will see all available Groups and Items that you could assign into the Discount Period.

1. Select the checkbox of a Group to select the entire Group and all items belonging to the Group.
2. Double-click on the Group to expand the listing to display the individual items that each Group contains and to select specific items to include into the Discount Period.

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Figure 5-44 Discount Periods



In the above example, we have entered information for the following Discount Period, 5% Discount from 10:00 — 12:00 or both Sport massage items.

1. Click **OK** create this Discount Period and save it into the current displayed Date. The Daily Setup screen will be automatically updated to display the addition of the new Discount Period.
2. To edit some or all of the information of a Discount Period, simply click on **Edit**.
3. The same window as before will open to edit the information you wish the change. Clicking on **OK** will save the changes and will update the Daily Setup screen automatically.

Discount Periods Overlaps

The Discount Periods functionality has a limitation in multiple Discounts Periods overlapping. Discount periods of the same type (Retail or Therapies) cannot be overlap or the system will not accept multiple periods existing for the same type in the same or overlapping period with another Discount Period of the same type.

In other words, looking at the screen above, we are having 2 Discount Periods for Therapies.

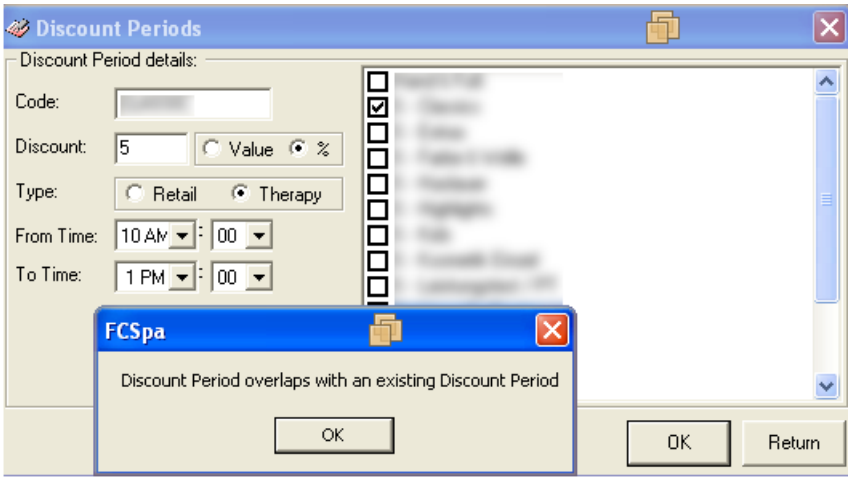
The first is CLASSIC from 10:00 – 12:00 for 5% for the 2 SPORT MASSAGE Therapies.

The second is HARMONY from 12:00 – 17:00 for 20% for all Therapies.

If we try to extend the ending time for the first period – CLASSIC – from 12:00 to 13:00, we will get the following message.

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Figure 5-45 Discount Periods Overlap



In other words, looking at the screen above, we are having two Discount Periods for Therapies.

The first is CLASSIC from 10:00 – 12:00 for 5 percent for the two SPORT MASSAGE Therapies.

The second is HARMONY from 12:00 – 17:00 for 20 percent for all Therapies.

If trying to extend the ending time for the first period – CLASSIC – from 12:00 to 13:00, he following message appears “Discount Period overlaps with an existing Discount Period.”

The system allows you to create new Discounts Periods for Retail Items as needed, as long as they do not overlap with the existing one from 10:00 – 14:00.

Discount Periods and Reservations

When Discount Periods exist for the selected/displayed Date and Location, the system displays the Multiple Discount Periods in the lower left corner of the main Reservations screen, using the same tree view listing as in the Daily Setup screen.

Multiple Discount Periods handling during reservations is implement as follows: The first time the system checks for reservations that include therapies that might be assigned into Discount Periods is during checking-in of appointments. At this time, the system checks and looks for all Therapies Discount Periods that might contain the currently checked-in therapy that falls inside the specified Starting and Ending Time.

If the system finds that the current reservation includes a therapy that applies for a discount, it automatically updates the reservation record internally with the discount amount and type (value or percentage). After you update the reservation record with all necessary discounting information, the Original Treatment price and the discounted price in the Reservation Info layout appear. At a later point, during the Finish and Post process, the discount is automatically calculated and appears in the Posting screen. Additionally, the posting screen will list on the right side all available Discount Periods of the current selected date, sorted by Type (Retail or Therapies) and then by Starting Time.

Discount Periods and Retail Items

When posting Retail Items, the Posting screen shows the Multiple Discount Periods, and also checks whether a selected Retail Item falls into an existing Discount Period.

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In this case, the system:

1. Calculates the Discount and display the new Extended Price (after discount). Also, it display the Discount value and type (under the Extended Price).
2. When you finally click **Add To Receipt**, the calculated Discount amount appears together with the Retail Item on the Invoice list (left side). The Total Amount automatically reflects the final price. In the same way, the system calculates Discounts that are assigned as Discount values (instead of percentages).

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6
Ticketing

The Ticket module allows for the configuration of event pricing, design of seating layouts, management of ticket bookings based on capacity, ticket printing, and sales report generation. It also supports event registration management at the entrance

Setup

This section describes the setup required for the Ticket module and its functionality. The majority of the required department codes are configured in the Setup tab. A good practice is to set up the Locations, Price Categories, Account Groups & Types, and Event Template, followed by the Bookable Event Setup.

Location Setup

Locations

Event Locations can be set up by clicking the **Locations** button on the ribbon bar, entering all the required information and clicking **Save**.

Table 6-1 Field Description of Location Details

Field Name	Description
Code	A short code for the location.
Name	The name of the location.
Description	A description of the location.
Comments	Comments about the location.
Deck	Location of the deck linked to TYP_DEK
Picture File	Stores the file path of attached picture file.
Availability	Function that controls whether the location is to show in the Overview screen.
Overlap Book	Function that controls the system to warn when booking exceeds the maximum number specified.

Deleting Event Location

To delete a location, select the location from the list and click the **Delete** button.

Locations Layout Setup

The **Locations Layout Setup** consists of two tabs:

- Layout Template Details
- Layout Level Details

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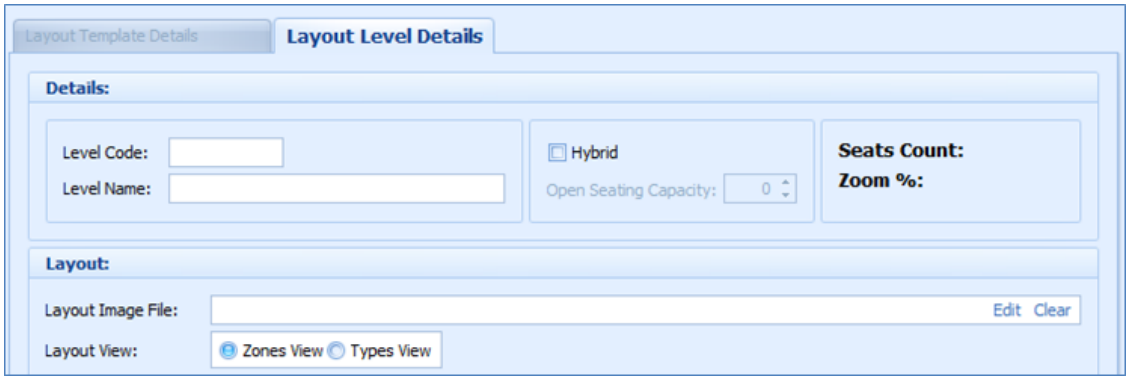
Layout Template Details

You can create the Layout template using the **Code, Name, Description**, and **Location**.

1. At the Setup tab, click **Locations Layout Setup**.
2. Click **Add New Template** to create a new template.
3. Enter all the information and click **Save Template** and then **Close**.

Layout Level Details

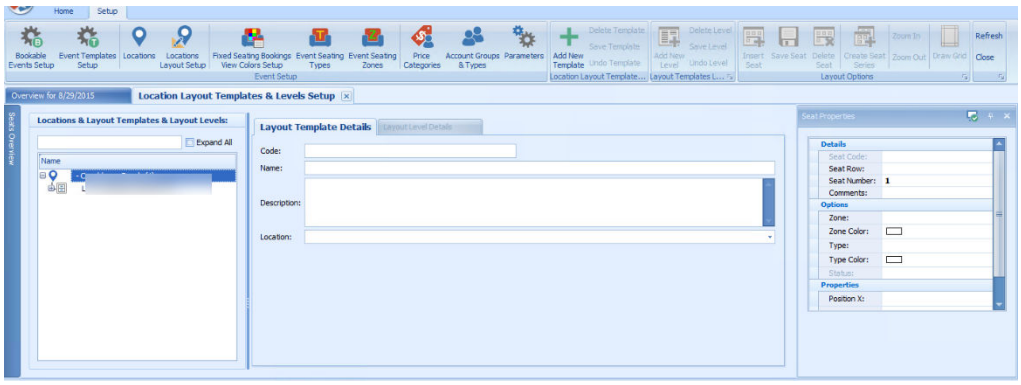
Figure 6-1 Layout Level Details



1. Select a layout template that you created earlier.
2. Click the **Add New Level** button.
3. Enter the Layout Level Details consisting of **Level Code, Level Name, Hybrid, Open Seating Capacity, Layout Image File**, and **Layout View**.
4. Click **Save Level** to save.

Creating Layout Template

Figure 6-2 Layout Template



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You can add a template, delete, save or undo the previous change made on the template. After creating the location template, add a new level for the template or define the seating zones by location.

Note that when you create a Template and Layout Level for a location:

- One location can have multiple templates.
- One template can have multiple layouts.

Table 6-2 Field Definition of Layout Template

Field Name	Description
Hybrid	An open space for people to stand.
Open Seating Capacity	Defines the number of hybrid for that level.
Seat Counts	Total number of fixed seats for that level, display field and auto-populate whenever a new seat is created for that level.
Layout Image File	Attached layout for that level (image file for example .jpg, .png, .bmp, and .gif)
Clear	To clear the saved image for that level Layout View radio button.

Adding Seats to Layout

The seat button toggles between both options, Insert Seat/Stop Insert Seat, when clicked.

To create a seat:

1. Click **Insert Seat** button.
2. Point to the layout the location of the seat.
3. Go to the **Seat Properties** window and update the seat row, number and all other relevant information per the following:
   - **Seat Code:** Seat Row and Seat Number (auto populated).
   - **Comments:** Enter comments for that specific seat.
   - **Zone and Type:** Select Seating Zone and Seating Type.
   - **Position X & Y:** Allows you to change the seat position X & Y in the layout.
   - **Rotation:** Option to rotate the seat.

Fixed Seating Bookings Color

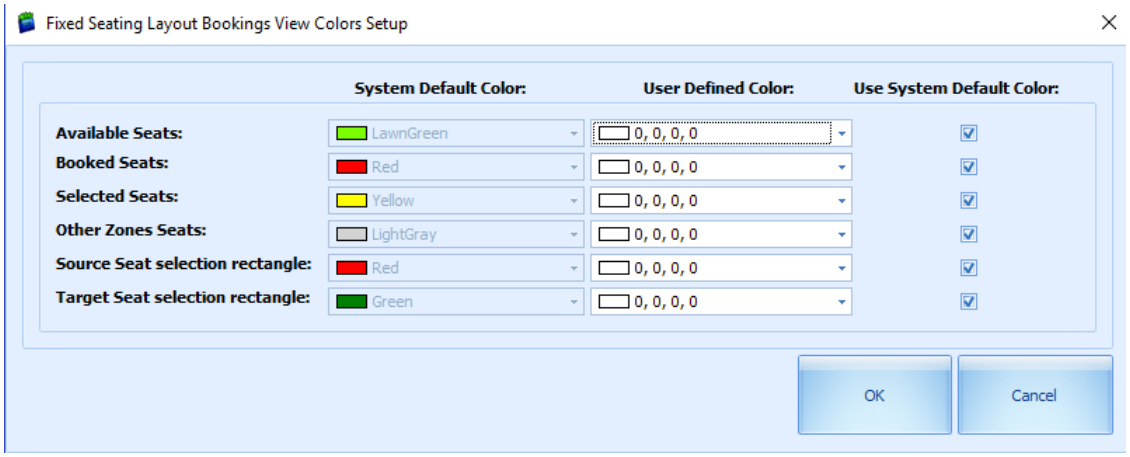
Creating a Series of Seats

You can create a series of seats starting with a seat number, number of seats, and orientation with this option.

To create, clicking the **Create Seat Series** button, enter all the relevant information, and click **Apply**.

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Figure 6-3 Fixed Seating Booking Color

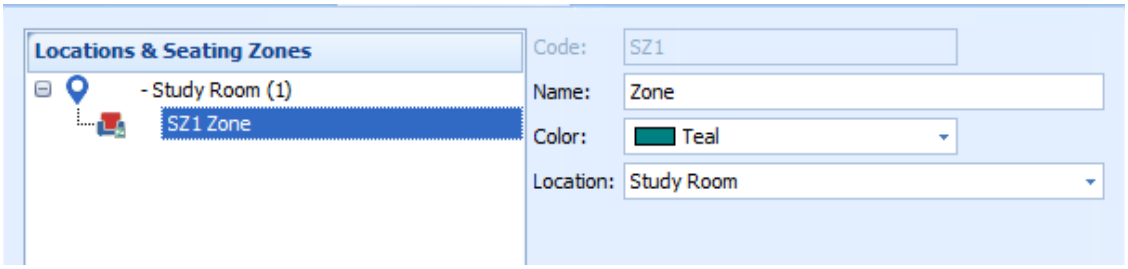


To select the color for each seating type,

1. Click the **Setup** tab.
2. Click the **Fixed Seating Bookings View Colors Setup** button.
3. By default, the **User System Default Color** checkbox is selected. To define a color of your choice, deselect the checkbox and select the color from the drop-down list under **User Defined Color**.

Event Seating Zones

Figure 6-4 Event Seating Zones



This function allows you to define the zone for use in seating plan setup.

1. At the Setup tab, select **Event Seating Zones**.
2. Click **Add New** to add a new zone.
3. At the Seating Zones form, enter the code, name and select a color and location from the drop-down list.
4. Click **Save**.

Account Groups and Type

Use Account Groups and Types to define the ticket categories, for example, adult/child in this module.

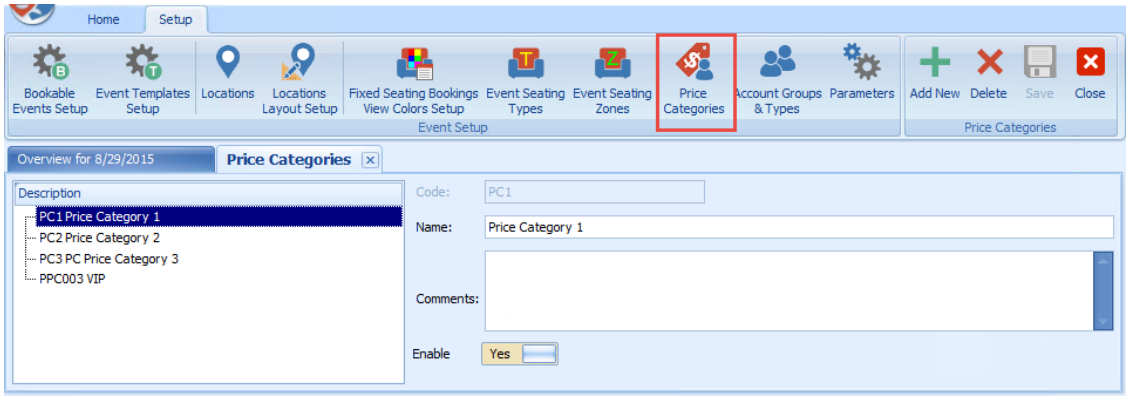
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1. Click the **Account Group and Types** on the ribbon bar.
2. Click **Add New** to add a new pricing for the required category.
3. Enter all the required information and click **Save**.
4. To delete a specific pricing category, move the mouse pointer over to the required description and click **Delete**.
5. Click **Close** to close this window.

Price Categories

Use Price Categories to categorize the event by price, sales type, seating zones, and others.

Figure 6-5 Price Categories



1. Click **Price Categories**.
2. Click **Add New** to add a new pricing for the required category.
3. Enter a **Code, Name,** and **Comment** in the respective fields.
4. Click **Save**.
5. To delete a specific pricing category, move the mouse pointer over the required description, and click **Delete**.
6. Click **Close** to close this window.

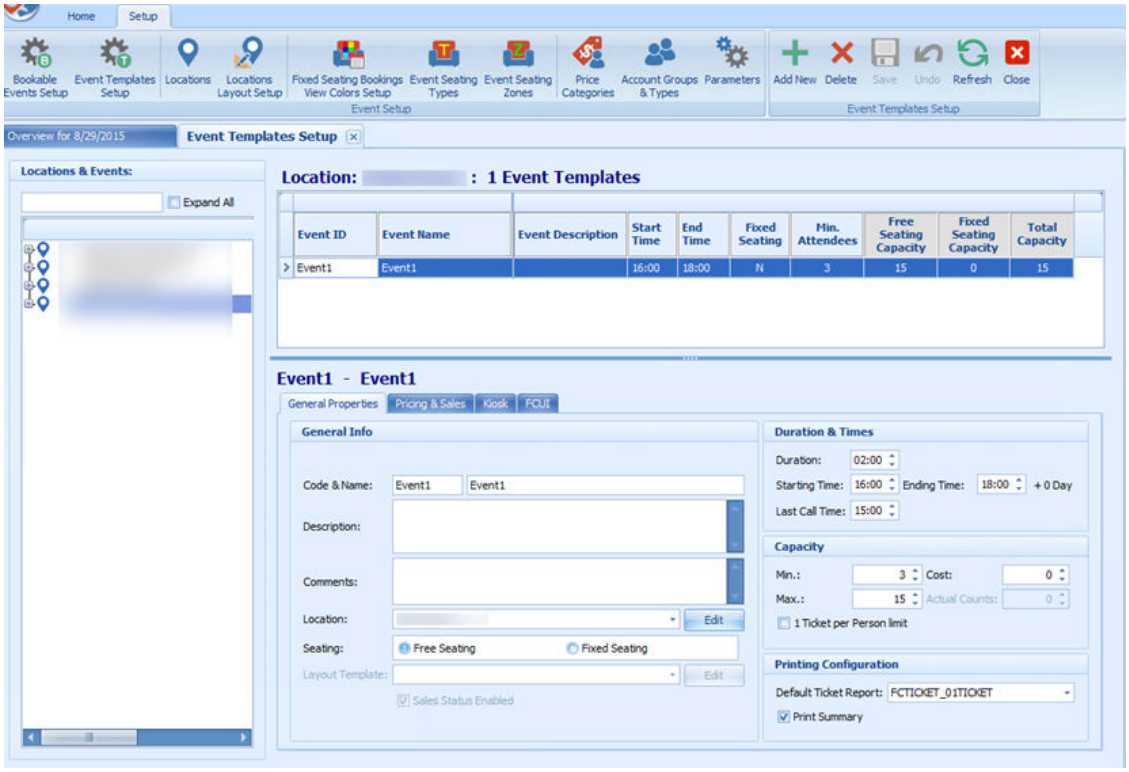
> **Note**
>
> If the Enable option is deselected, this will also disable the pricing categories from the *Edit Template-Pricing Categories* configuration tab.

Event Templates Setup

You can set up a template as a base for Bookable Events Setup.

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Figure 6-6 Event Templates Setup Details



The Event Templates Setup window is comprised of three main sections:

- **Locations & Events:** Displays the location name and type of events within the location.
- **Location Details for the Event ID:** Displays the number of events templates created for the location with information such as Event ID, Event Name, Event Description, Start/End Time, Seating Type, Min/Max Attendees, Seating plan, Layout Template, and so on.
- **Event ID and Event Name Details:** This section has four tabs: General Properties, Pricing & Sales, Kiosk, and FCUI, and Details of each tab are listed below.
  - **General Properties Tab**
    - **General Info section:** Code & Name, Description, Comments, Location, and Seating.
    - **Duration & Times section:** Duration, Starting Time, Ending Time, and Last Call Time.
    - **Capacity section:** Min, Max, and Cost.
    - **Printing Configuration:** Default Ticket Report.
  - **Pricing & Sales Tab**

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Figure 6-7 Bookable Event Setup — Pricing and Sales



* **Pricing Categories Configuration:** Free Seating – Price Category, Account Category, Color, Regular Price, Show in Kiosk, Show in FCUI.
* **Sales Configuration:** Sales Posting, Voiding Departments, Sales Tax and Cancellation Fee.

> **Note**
>
> Use the **Remove Price** to remove the price category or the **Edit Mode** to add the required price category.

– **Kiosk**

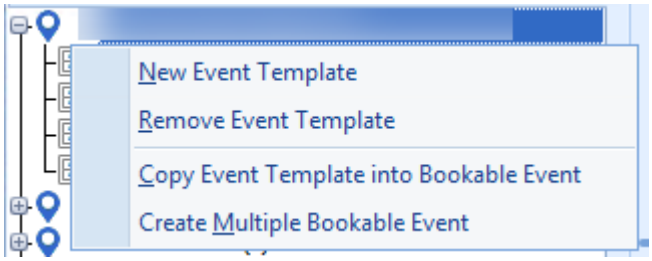
* Kiosk Sales enables you to define whether the ticket can be booked through the Kiosk or only to show the information. In the Multimedia Files Configuration, you can attach a video, audio or HTML file.

– **FCUI**

* FCUI Sales Configuration enables you to define whether the ticket can be booked through the interface or only display the information as displayed in FCUI.

Creating New Event Template

Figure 6-8 New Event Template Options



To create a new template:

1. Select **Event Templates Setup**.
2. Right-click the navigation tree and select **New Event Template**.

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3. Enter all the required information in each of the tabs.
4. If are using a Fixed Seating plan, you can attach a Layout Template to the event. See Creating Layout Template

Removing an Event Template

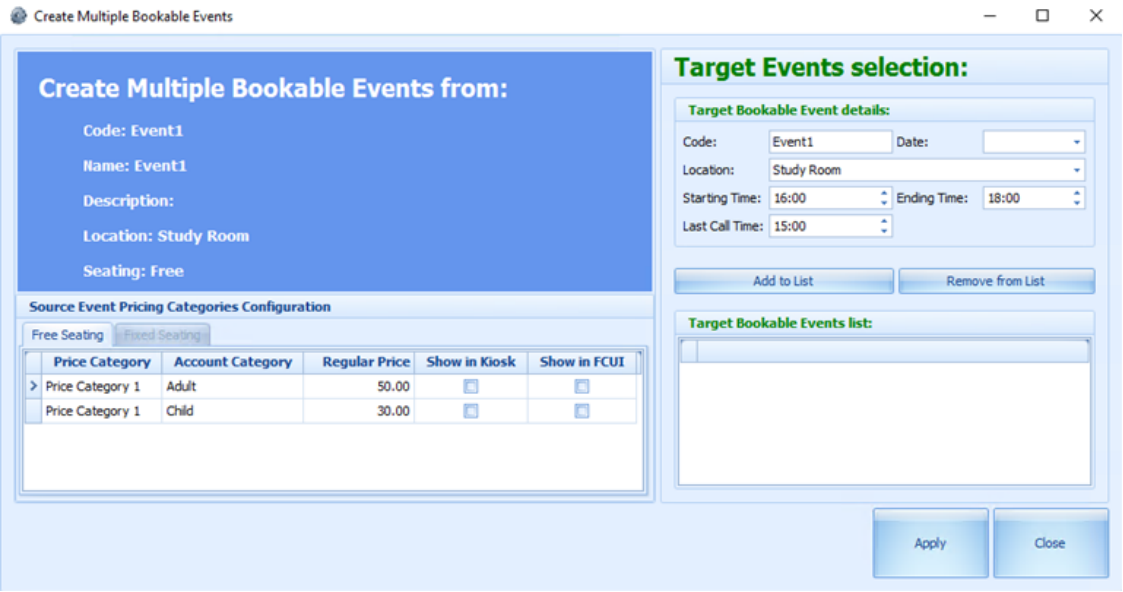
1. At the navigation tree, right-click and select **Remove Event Template**.
2. At the system prompts **"Are you sure you want to remove the selected Event Template?"**, click **OK** to continue.

Copying an Event Template into Bookable Event

1. At the navigation tree, right-click the event you wish to copy.
2. Select **Copy Event Template into Bookable Event**.
3. At the dialog prompts **"Please specify the Date you want the selected Event template to be copied to:"**, select the new date and click **OK** to proceed.

Creating Multiple Bookable Events

Figure 6-9 Create Multiple Bookable Events Form



1. The bookable event appears in the **Code** field.
2. In the drop-down list, select for **Date**, **Location**, **Starting Time**, **Ending Time**, and **Last Call Time**.
3. Click **Add to List**. Use **Remove from List** to remove unwanted events.
4. Click **Apply** to create.

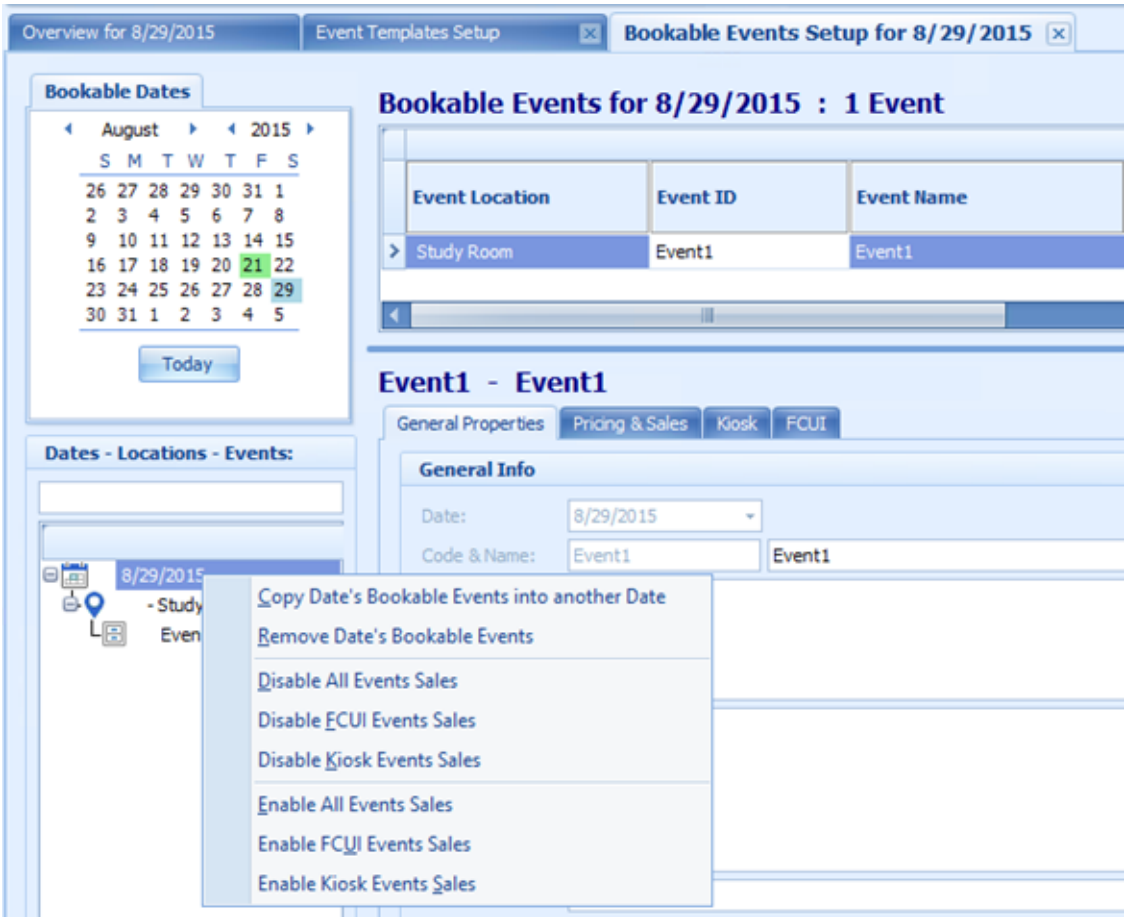
Bookable Event Setup

The ticket booking for an event can be set up by date, location, and event level.

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Ticketing By Date

Figure 6-10 Ticketing by Date Level



In Ticketing by Date Level, you can perform the following functions:

- Copy Date's Bookable Events into another Date.
- Remove Date's Bookable Events.
- Disable All Events Sales.
- Disable FCUI Events Sales.
- Disable Kiosk Events Sales.
- Enable All Events Sales.
- Enable FCUI Events Sales.
- Enable Kiosk Events Sales.

To access one of the above function:

1. Right-click on the event date.
2. Select the option from the menu.
3. At the confirmation prompt, read the message prompt before clicking **OK** to proceed or **Cancel** to terminate.

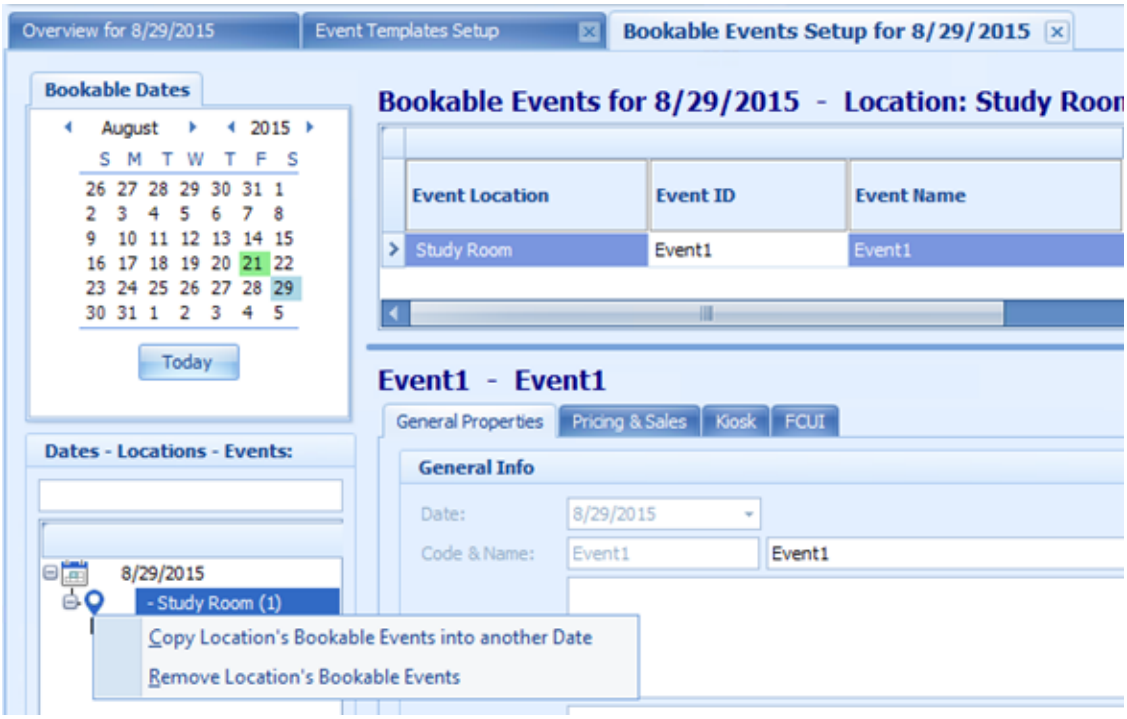
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Copy Date's Bookable Events into Another Date

When copying a bookable event into another date, you will receive a prompt to confirm to whether to copy the entire series of the event or not. From the drop-down list, select the date to copy and click **OK** to confirm.

Ticketing By Location

Figure 6-11 Ticketing by Location Level



In Ticketing by Location Level, you can perform one of the following functions:

- Copy Location's Bookable Events into another Date.
- Remove Location's Bookable Events.

To access this function:

1. At the navigation panel, expand the date and right-click the event location.
2. Select the desired option. If you are copying the location to another date, select the new date when prompt.
3. At the confirmation prompt, click **OK** to proceed.

Ticketing by Event

To copy or remove the bookable event in Ticketing by Event Level, see steps for Ticketing by Location and select the event instead of the location.

Parameters

Below is the list of Parameters available to Ticket module and they are editable.

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Table 6-3 Parameters

PAR Name	PAR Value	Description
Allow posting 0 price Tickets to the Disabled accounts	0 or 1	1 - Allow posting zero price Tickets to Disabled accounts in Bookings screen. 0 - Don't allow searching for Disabled Accounts and post anything to them.
Cancel Fees Default Dept	Dept number, for example, 1234	Use Debit Department when posting Cancellation Fees when voiding normal Event Bookings in OHCTICKET.
CancellationFees Default Value	0.00 or %	Default Value or Percentage (if % sign exists) for Cancellation Fees.
Default Ticket Report	for example, OHC_Ticket_01Ticket	Default Ticket Report for OHCTICKET (REP_FILENAME).
Default value for Sales Tax	0.00 or %	Default Value or Percentage (if % sign exists) for Sales Tax.
Display Time Fields in 24Hour format	0 or 1	1 - Enable Displaying time fields in 24–hour format 0 - Enable Displaying time fields in 12–hour a.m./p.m. format.
Enable Multiple Bookings	0 or 1	1 - Enable Multiple Bookings functionality in Bookings screen. 0 - Disable this functionality, This option allows booking the same set of Events for multiple Accounts in one-step. Useful for small group postings.
Enable NOPRINT for Event Voids	0 or 1	1 - Enable setting Event Voids to "NO PRINT" to hide them on the accounts. 0 - Disable setting Event Voids to "NO PRINT" in order to show them on the accounts.
Enable Shoreside Refunds for Prepaids	0 or 1	1 - Enable Refunding Prepaid Bookings Shoreside (System Account) when applying Discounts on Prepaid Bookings. 0 - Disable Refunding Prepaid Bookings Shoreside (System Account) and allow only Onboard (Guest Account).
Enable Voiding Bookings on Checked-Out Accounts	0 or 1	1 - Enable Voiding Bookings on Checked-Out Accounts with Voided Transaction posted into Internal Error System Account. 0 - Disable Voiding Bookings on Checked-Out Accounts.

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Table 6-3 (Cont.) Parameters

PAR Name	PAR Value	Description
Enable Voiding Crew Bookings from previous Cruises	0 or 1	1 - Enable Voiding of Crew Bookings that belong to previous Cruises or have been closed. 0 - Disable Voiding of Crew Bookings that belong to previous Cruises or have been closed.
Exporting Tickets	0 or 1	1 - Exporting Tickets is in progress - Do not allow any other process to start 0 - No Exporting Tickets process detected - allow this process to start.
OHCTICKET Posting Department Code Include Sales Tax in Price	Dept number, for example, 1234	OHCTicket Default Posting Department.
Include Sales Tax in Price	0 or 1	1 – Include Sales Tax from Event Price on screen. 0 – Exclude Sales Tax from Event Price on screen.
Notify for Overlapping Events	0 or 1	1 – Enable Overlapping Events checking and notification during Booking process. 0 – Disable Overlapping Events checking and notification during Booking process.
Onboard Refund for Prepaids	0 or 1	1 - Onboard refunding when voiding Prepaid Booking. 0 - Shoreside refunding when voiding Prepaid Booking.
PrePaid CancelFee Default Dept	Dept number, for example, 1243	Debit Department to be used when posting Cancellation Fees when voiding PrePaid Event Bookings in OHCTICKET.
PrePaid Voids Default Dept	Dept number, for example, 1243	Debit Department to be used when posting Cancellation Fees when voiding PrePaid Event Bookings in OHCTICKET.
Prepaid Events Default Pos Department	Dept number, for example, 1243	Debit Department to be used when posting Voids when voiding PrePaid Event Bookings in OHCTICKET.
Prepaids Refund Confirmation	1	1 - Require Confirmation when Refunding Prepaids during voiding.
Print + Post Summary	0 or 1	0 - Do not print summary after printing tickets in Print+Post. 1-Print.

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Table 6-3 (Cont.) Parameters

PAR Name	PAR Value	Description
Print Event Tickets	0 or 1	0 - Do not print Event Tickets after click Post. 1 - Print Event Tickets after click Post.
Print Events Summary	0 or 1	0 - Do not print summary. 1 - Print.
Print Void Summary	0 or 1	0 - Do not print summary after voiding tickets. 1 - Print.
Require Waitlist Confirmation	0 or 1	0 - No confirmation when adding Booking into Waitlist. 1 - Display confirmation with Waitlist No.
Unposted Bookings Posting	0 or 1	1 - Unposted Bookings posting is in progress - Do not allow any other process to start 0 - No Unposted Bookings posting process detected - allow this process to start
Use Cancellation Fees	0 or 1	1 - Enable / 0-Disable use of Cancellation Fees when voiding Event Bookings in OHCTICKET.
Use Event Waitlists	0 or 1	1 - Enable / 0 - Disable use of Event Waitlists.

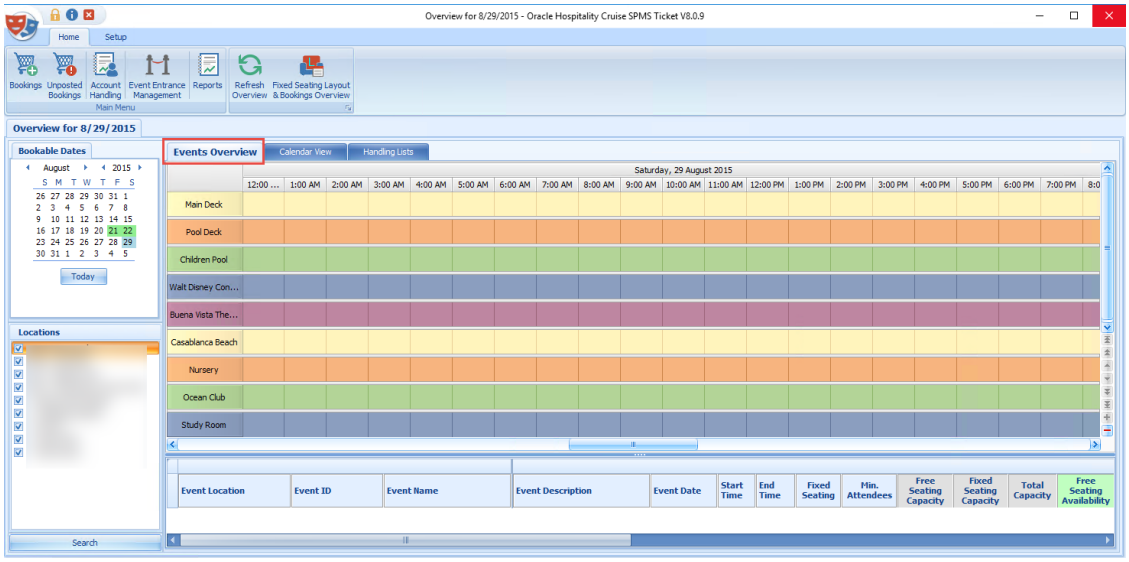
Event Overview

The Event Overview section provides a comprehensive view of the current and upcoming events, as well as the booking records of an event. It consists of three tabs:

- Event Overview
- Calendar View
- Handling List

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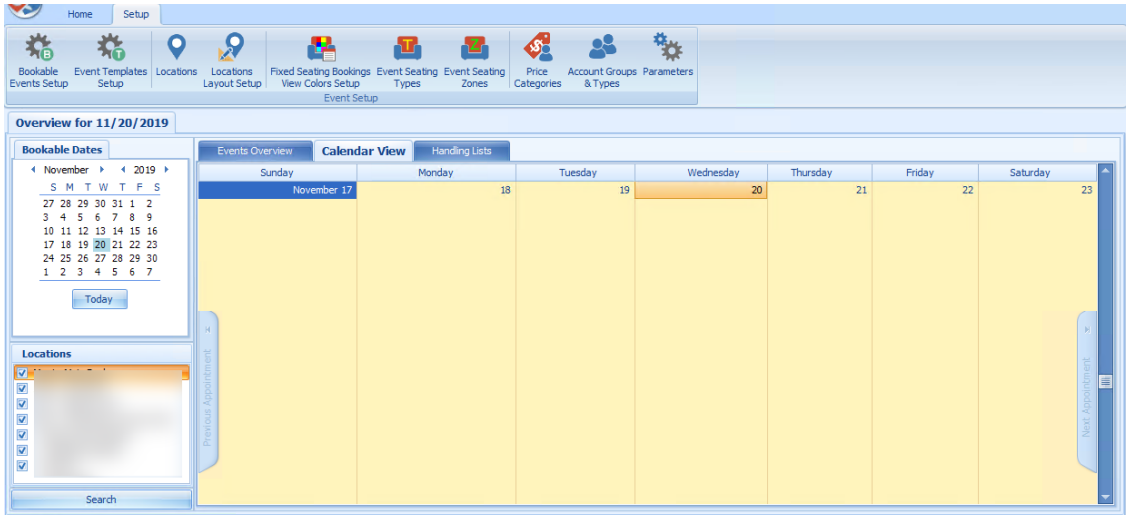
Figure 6-12 Event Overview



This window is divided into two sections providing the following:

- A view of all bookable events according to the event start and end time.
- List all events of the selected date, including information such as start and end time, seating type minimum / maximum attendees, total bookings, and others.

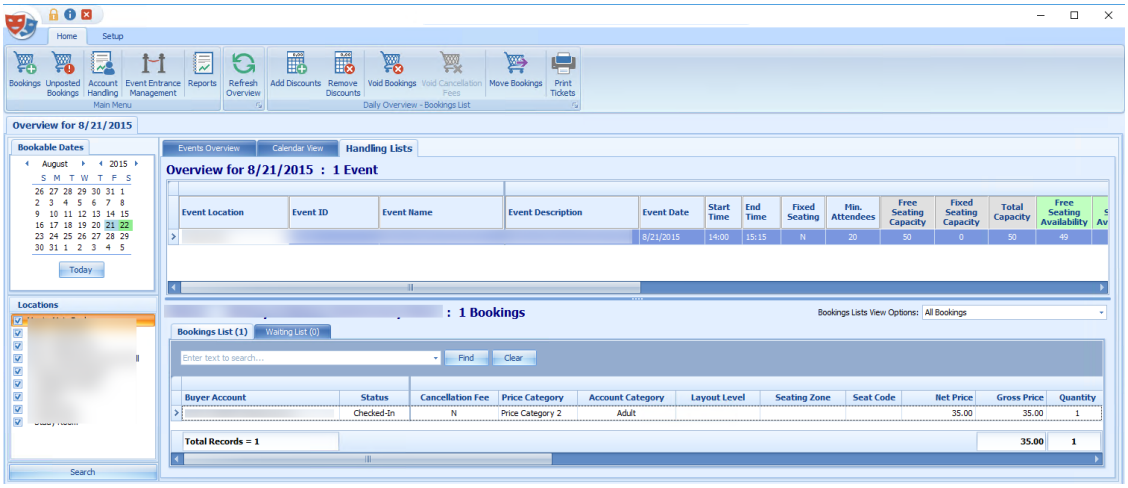
Figure 6-13 Calendar View



The Calendar View displays the weekly events of the selected date in time order. Scrolling downwards moves the date forward by one week.

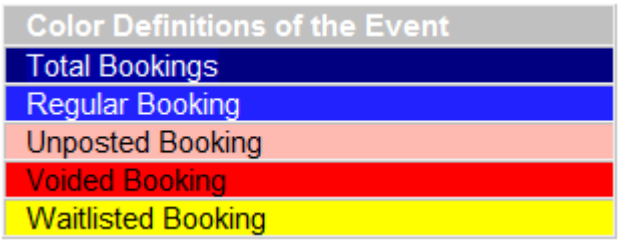
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Figure 6-14 Event Handling List



The Handling Lists provide an overview of the selected event allowing you to manage the event from one location. It lists the details and total number of events of the selected date in the grid. A list of the bookings appears in the Booking List tab while the Waiting List tab lists all of he guests on waiting lists. The total number of bookings for the event is shown on the far right side of the grid. Scroll right to view the remaining columns.

Figure 6-15 Color Definition



Booking List

Under the Booking List tab, you can perform functions such as **Add Discounts, Void**, **Move Bookings**, and **Print Tickets**. See the Account Handling for more details.

Removing a Waitlist Booking

1. In the Waiting List tab, select the booking to remove.
2. Click the **Move Waitlisted Bookings** at the ribbon bar.
3. In the Confirm to Remove All or selected Waitlisted Bookings dialog, select the appropriate option.

> **Note**
>
> You can select **All**, to remove all the waitlist booking from the grid.

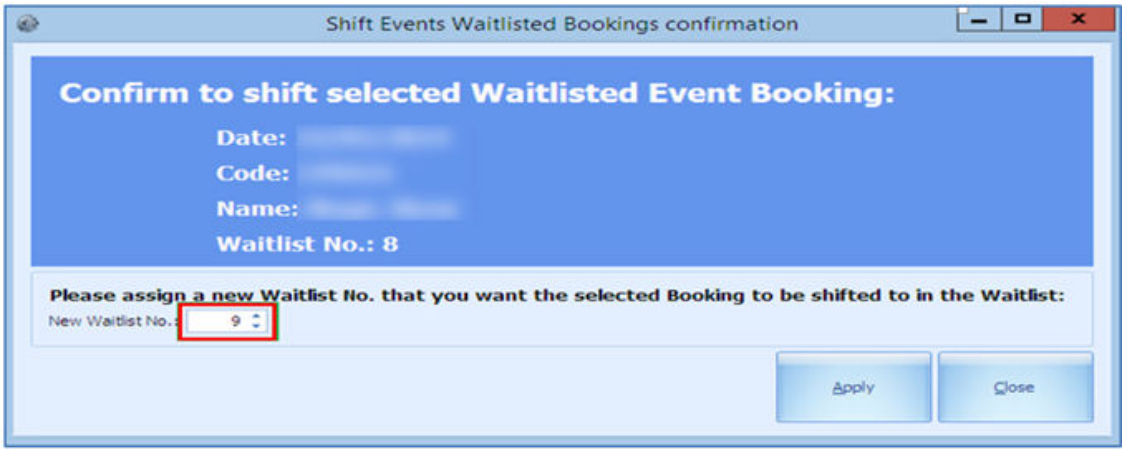
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Shifting a Waitlist Booking

This function enables you to reorder the waitlist booking, depending on the new number you insert. For example, if the current waitlist number is eight and the new waitlist number is ten, it will move this booking to the bottom of the list.

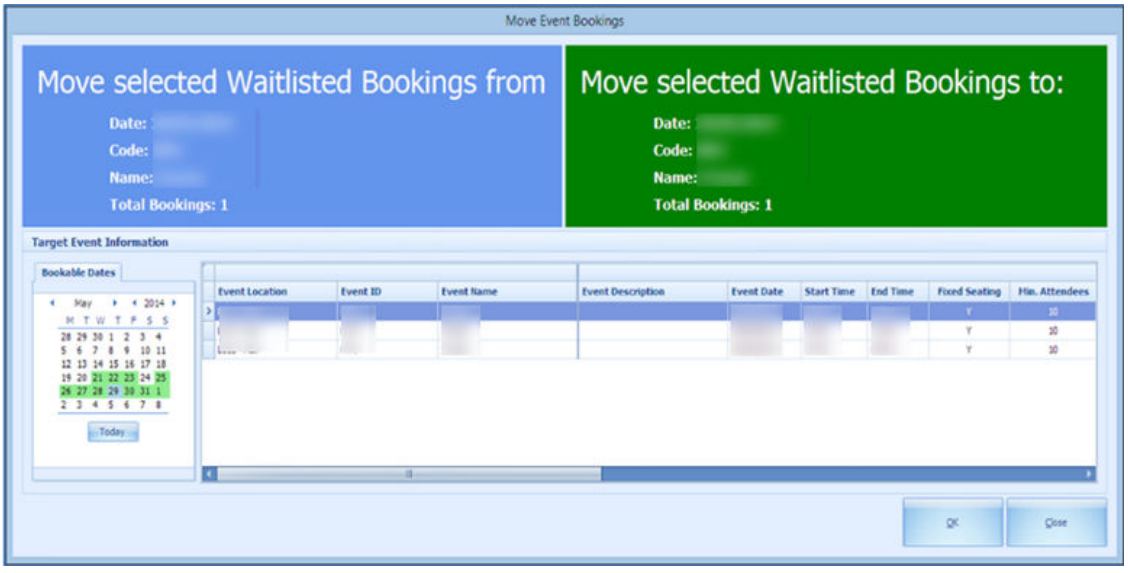
1. Select the booking to shift from the **Waiting List** tab.
2. Click the **Shift Waitlisted Bookings** button at the ribbon bar.
3. Insert a new waitlist number and click **Apply**.

Figure 6-16 Shift Events for Waitlisted Bookings



Moving Waitlist Booking to Another Date

Figure 6-17 Move Event Bookings



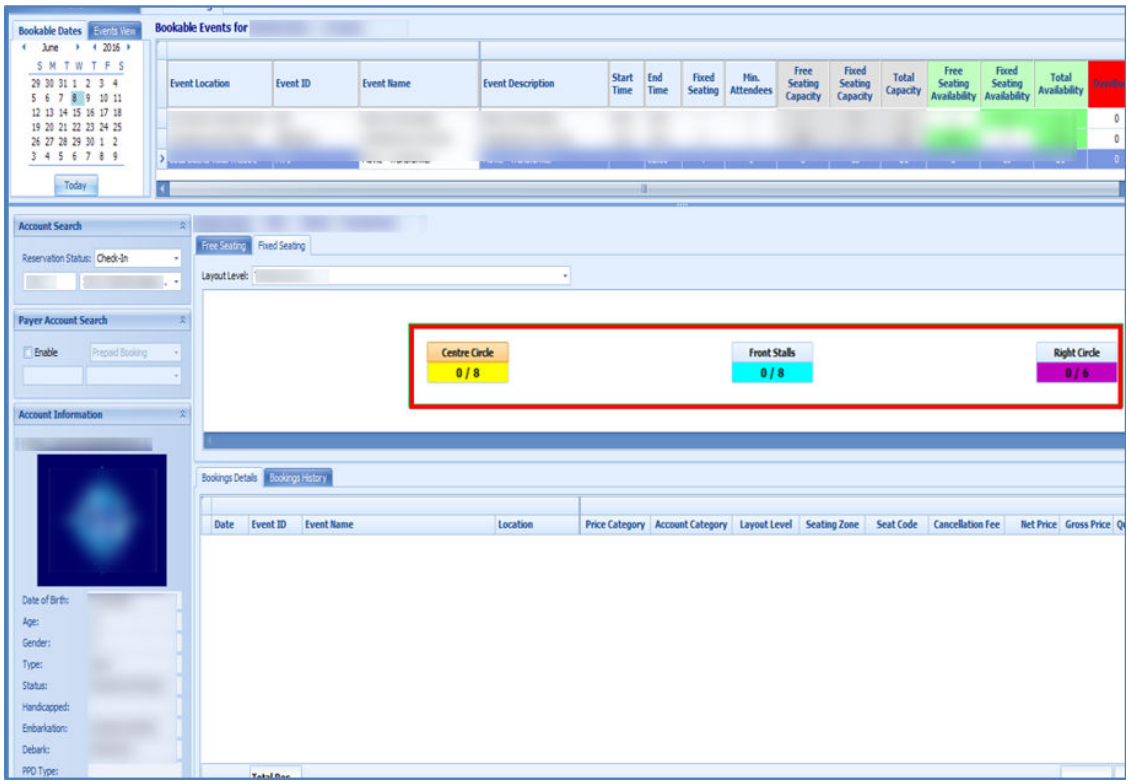
The system only allows you to move bookings created from the same booking template.

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1. Select the **waitlist booking** from the Waiting List tab.
2. Click **Move Waitlisted Bookings**.
3. At the confirmation prompt, select the **new date** and click **OK**.

Bookings

Figure 6-18 Bookable Event Fixed Seating Tab



The Event Booking window consists of two tabs:

- **Bookable Date View:** Shows the bookable event by date in a calendar view.
- **Events View:** Enables you to search for events of the same ID.

Bookable Date View

In the Bookable Date View:

- Dates marked with green denotes the event available for that date.
- Dates marked with gray are the selected date sand correspond to the date shown in Dates, Locations, and Events.

Events View

In the Event View tab, the system searches and return a list of events matching the event ID entered in the **Event code** field.

Ticket Price

The ticket price of the selected event is shown in the middle section of the Event Booking.

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Account Search

The Account Search function allows you to search for an account by reservation status (Check-In, Reservation, or Check-Out Residents) and by Cabin Number/Name. The account information displayed in the Account Information section.

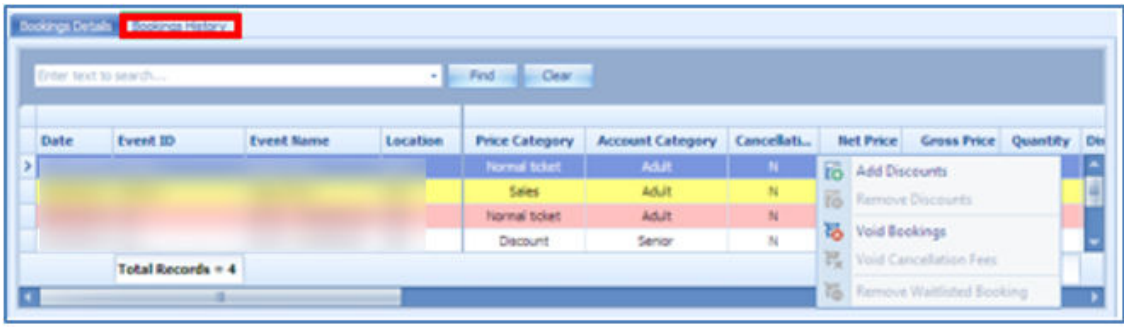
You can search for the payer account type (Prepaid or Routed) by selecting the **Enable** checkbox, selecting the payer type, and then entering the account information. The Account information displayed is of the selected guest.

Booking Details

The Booking Details tab displays details of the selected event, total records and prices. Functions such as **Add Discounts, Remove Discounts, Void Bookings, Void Cancellation Fees, and Move Bookings** can be performed by right clicking the selected booking or using the button on the ribbon bar.

Booking History

Figure 6-19 Booking History



This tab displays the history details of event previously booked. Scroll to the right for more information.

Booking an Event

1. Click the **Bookings** button on the ribbon bar.
2. On the Event Bookings screen, select the date of the event and then select the **Event Location**. The Price Category of the event is listed under the Free Seating tab.
3. At the **Account Search** function, search for the account.
4. Click the **Price Category** once. Clicking the Price Category again increases the quantity and you will receive a prompt to confirm whether you want to reserve more than one seat.
5. Click **Post** to post the booking fee to the account.

Fixed Seating Booking

Before you can book a seat using Fixed Seating, make sure you have the event location and layout setup. See **Locations Layout** and **Creating Layout Template** for more information.

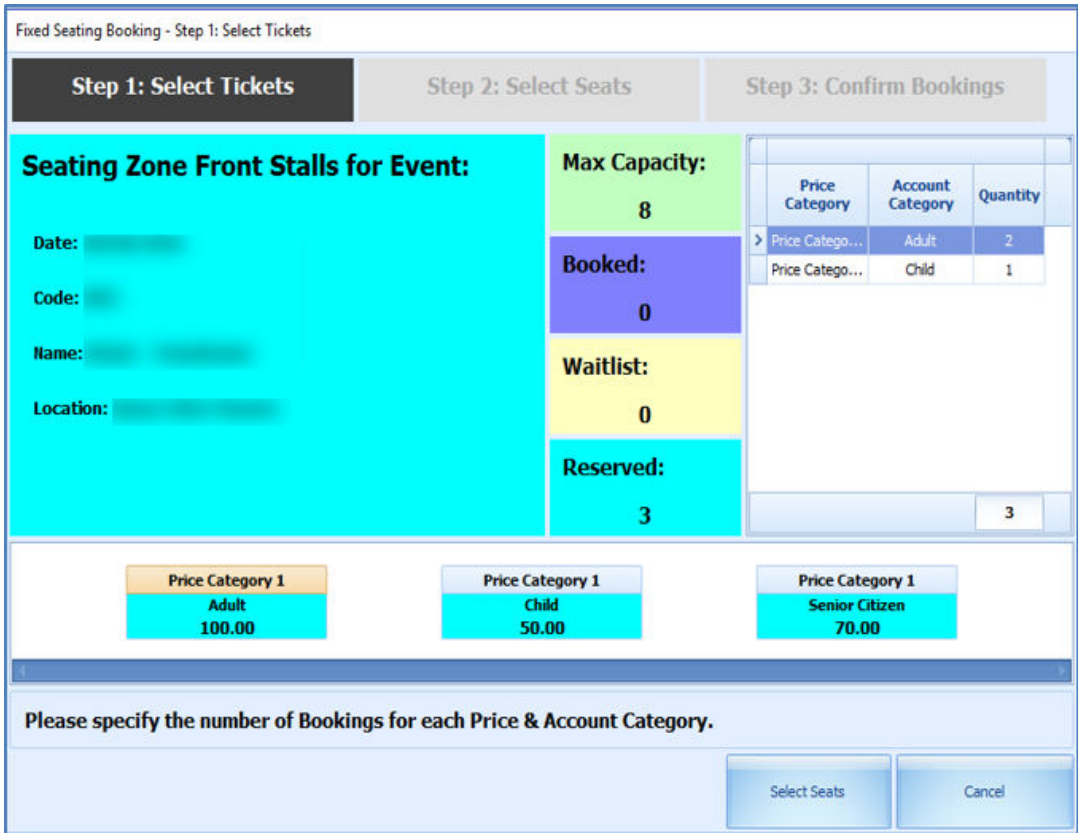
To book a Fixed Seating event:

1. Select an **event** from the Event Bookings tab. Select a **guest** and select a **fixed seating event**.

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2. Under the Fixed Seating tab, select a **layout** from the drop-down list. The available pricing for the selected layout is displayed, for example '0/8' in the xxx Price Category. "0" indicates the number of tickets booked while "8" indicates the total number of tickets available.
3. At the Booking Wizard **Step 1: Select Tickets**:
   a. Select a **Price Category** and the number of **tickets**.
   b. Click **Select Seats** to go to **Step 2: Select Seats** and allocate a seat number. The default layout view for this booking is Booking View. You can change the view to Zones or Type.
   c. Click **Book Seats**.
   d. At the Step 3: Confirm Booking tab, verify the information shown and click **Confirm Bookings** to complete the booking.

Figure 6-20 Fixed Seating Booking Step 1: Select Tickets



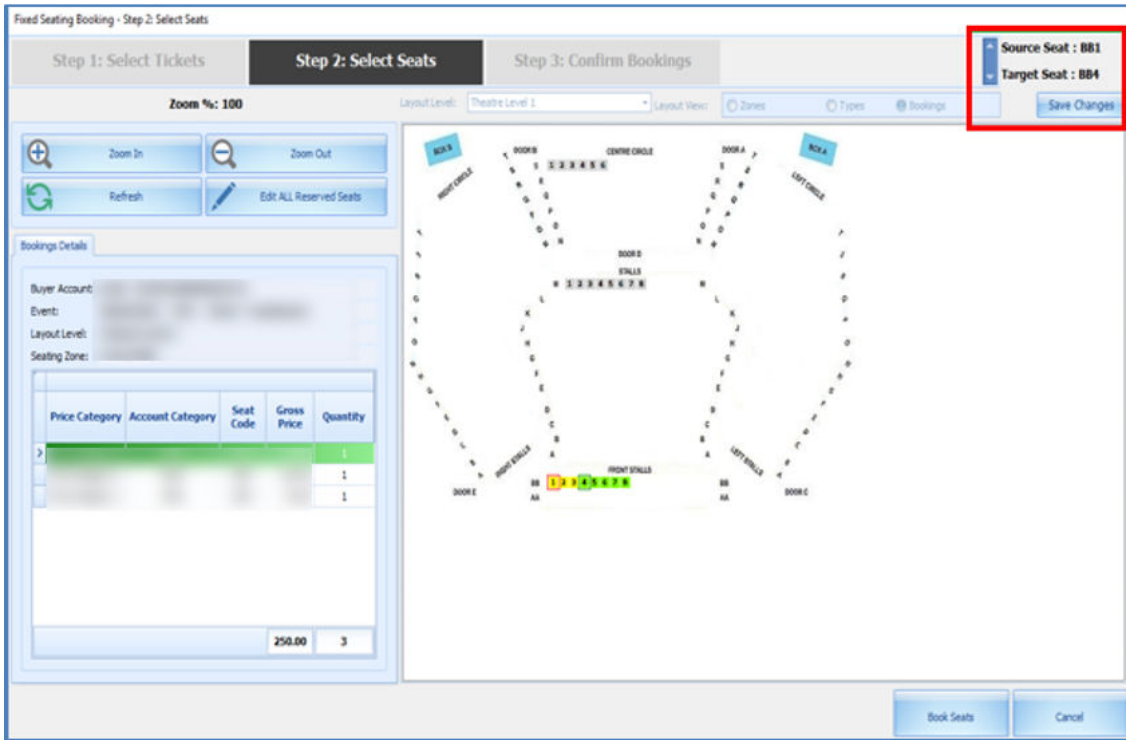
Layout View by Zones, Types or Bookings

The information shown in the Layout by Zones and Types is similar. It lists the availability of the seating zones and corresponding colors, whereas the Bookings view lists the booking information of the selected seat.

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Relocating Seat in Step 2 of the Booking Wizard

Figure 6-21 Fixed Seating Booking Step 2: Select Seats

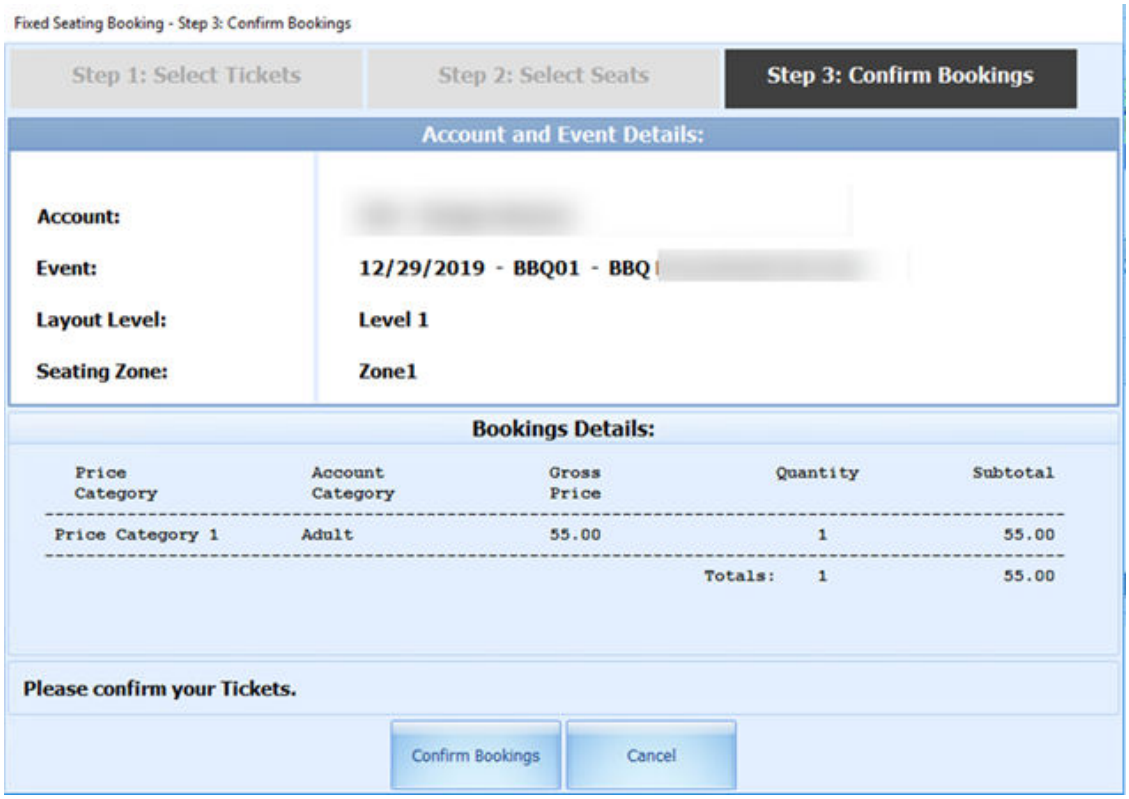


To move an allocated seat to another in **Step 2: Select Seats**:

1. Select **Edit ALL Reserved Seats**. This button toggles to **Stop Editing ALL Reserved Seats** and vice versa when clicked.
2. Select a new **seat code** to begin from the layout.
3. For example, the assign seat is BB1-BB3 and selecting BB4, will move all three seats to BB4-BB6.
4. If the number of the allocated seats is less than the seats you are moving, a warning message appears.
5. Click the **Stop Editing ALL Reserved Seats** once all seats are moved.
6. Click **Save Changes** to update the layout view and at the grid.
7. Once confirmed, click **Book Seats** to go to next tab, Step 3: Confirm Bookings.
8. Complete the booking by clicking **Confirm Bookings**.

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Figure 6-22 Fixed Seating Booking Step 3: Confirm Booking



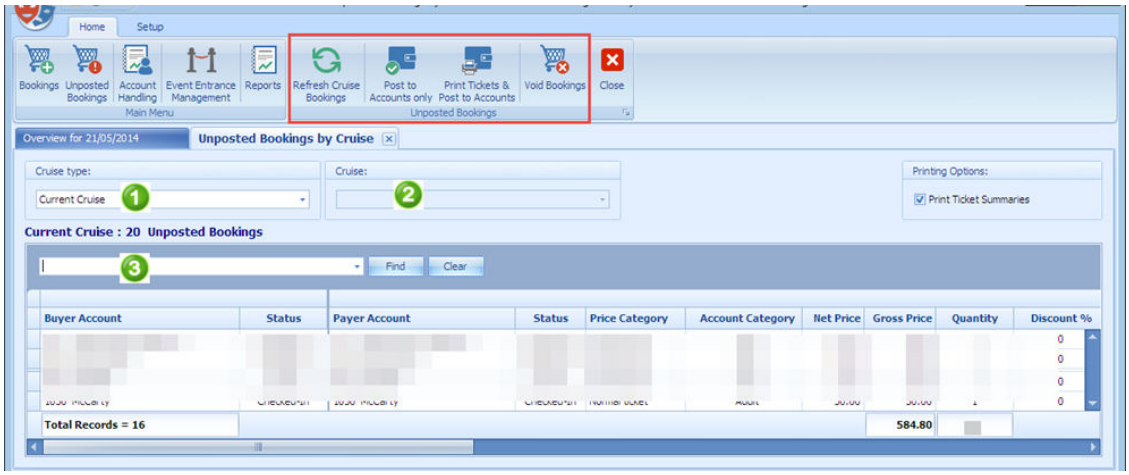
Fixed Seating Layout and Bookings Overview

This button is only available if a fixed seating event is highlighted. It displays the layout view of the selected fixed seating event.

Unposted Bookings

This section displays all the unposted bookings in the system, and has four functions that you can perform.

Figure 6-23 Unposted Bookings



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- Refresh Cruise Bookings.
- Post to Accounts Only.
- Print Tickets & Post to Accounts.
- Void Bookings.

Refresh Cruise Bookings

This function refreshes the booking list in the Unposted Booking By Cruise tab.

Post to Account

1. At the Unposted Bookings by Cruise tab, select an **unposted booking** from the grid. Multiple selections are allowed.
2. Click the **Post to Accounts Only** button.
3. Select the appropriate option at the confirmation prompt that indicates the number of bookings to be posted.

Print Tickets and Post to Accounts

This option prints and posts the charges to the account at the same time.

1. Select an unposted booking from the grid. Multiple selections are allowed.
2. Click the **Print Tickets and Post to Accounts** button.
3. Select the appropriate option at the confirmation prompt that indicates the number of bookings to be posted.
4. The tickets will print to the designated printer.

Void Booking

You can void a booking from the Unposted Booking list by clicking the **Void Bookings** button. Alternatively, you can right-click on the booking and select the option from the context menu.

At the confirmation prompt, select the appropriate option.

> **Note**
>
> The system will not prompt you for a void reason when voiding from the Unposted screen.

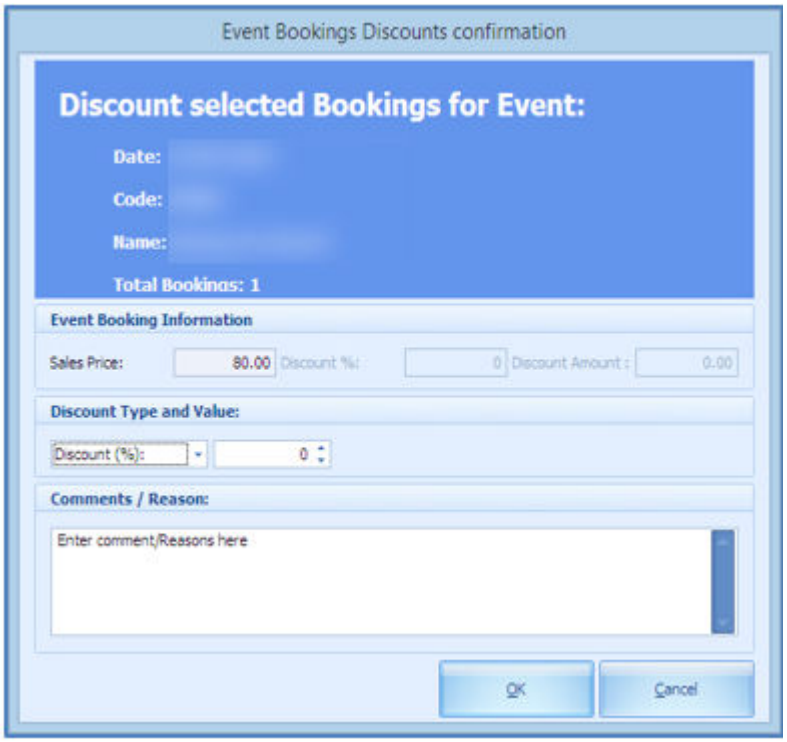
Account Handling

The Account Handling section allow you to Add/Remove Discounts, Void Bookings, Move Bookings, and Print Tickets.

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Adding a Discount

Figure 6-24 Event Booking Discount



To add a discount to a booking:

1. Select the **booking** and click **Add Discount**.
2. Select the type of **discount** – by value or by percentage.
3. Insert a comment or reasons in the free text field.
4. Click **OK**.

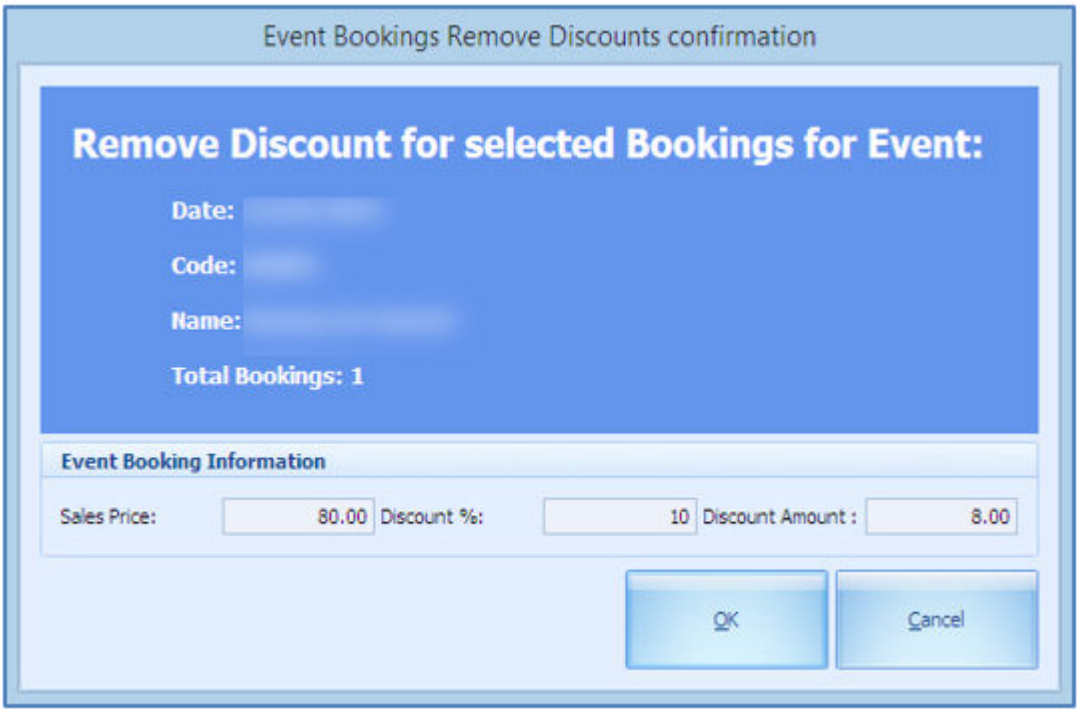
Figure 6-25 Discount Posting



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Removing a Discount

Figure 6-26 Event Bookings Remove Discount



1. Select a **booking** with a discount value / percentage.
2. Click **Remove**.
3. You are prompted by a confirmation with its value shown, which is non-editable.
4. Click **OK**.
5. This reverses the transaction with the discount and reposts a new transaction (undiscounted).

Voiding a Booking

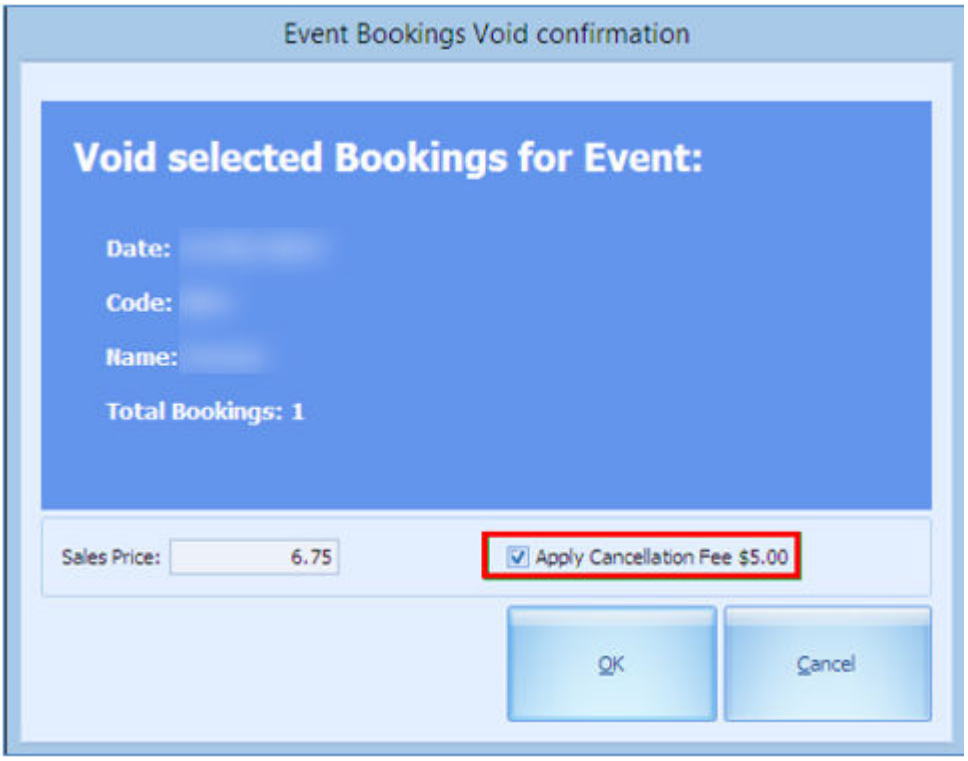
Figure 6-27 Void Booking



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1. Select the **transaction** to void.
2. Click **Void Bookings**.
3. At the confirmation prompt, the **Apply Cancellation Fee $ X** is selected by default. Deselect this if a cancellation fee is not applicable or update the PAR setting to permanently disable this function.

Figure 6-28 Void Confirmation



4. Click **OK** to proceed.
5. Enter a void reason when the system prompts the **Void Event Booking Reason** screen.
6. Click **OK** to confirm.

Voiding a Cancellation Fee

1. Select the **booking** that has a Cancellation Fee flagged with **Y**.
2. Click the **Void Cancellation Fees** button and click **OK**.
3. Enter a reason at the Void Event Cancellation Fee Reason prompt.
4. Click **OK** to confirm.

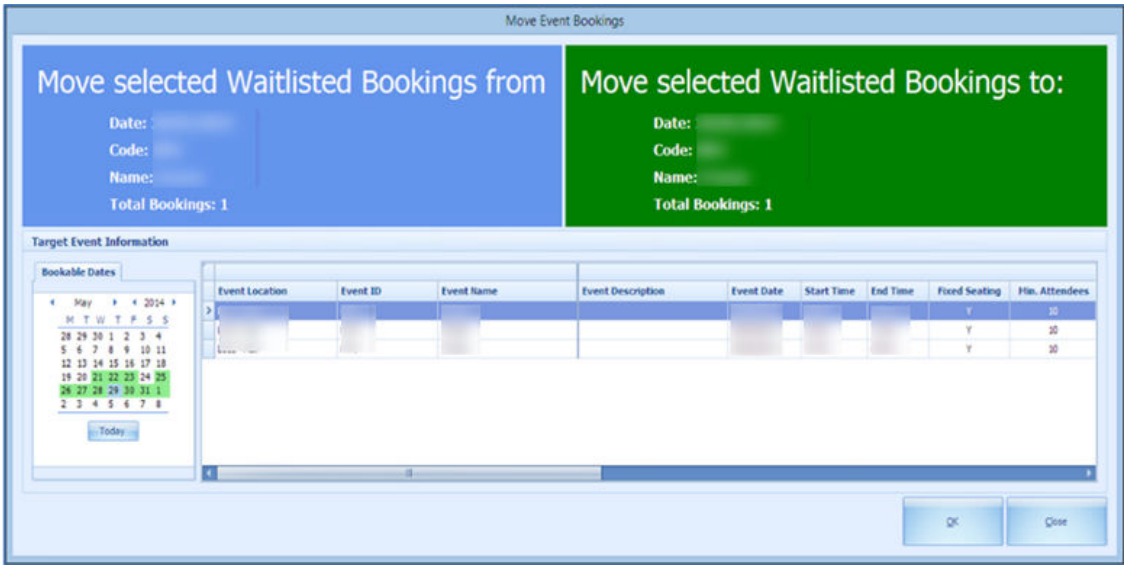
Moving a Booking

The Move Booking function allows you to move tickets purchased from one date or event to another. A bookable event is created using the same template from Event Templates Setup.

> **Note**
>
> It is not possible to move an event if was copied from Bookable Event Setup.

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Figure 6-29 Move Bookings



1. Select a booking from the **Account Handling** screen.
2. At the Confirm to Move All or Selected Bookings prompt, select an **option**.
3. The system prompts you to confirm the number of booking(s) to move.
4. Select the **new date** to move to.
5. Click **OK**.

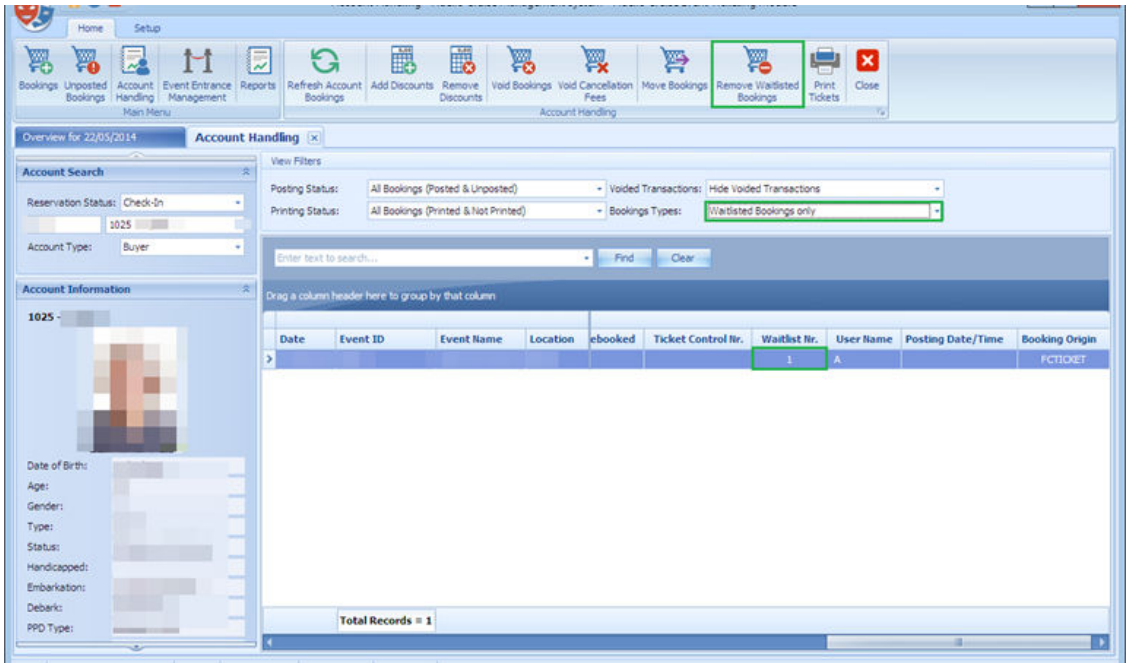
Move Bookings using the same template

The system allows you to move the bookings when they are created using the same template. If you are moving a booking that uses a different template, the system prompts you to void the first booking and re-post.

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Removing Waitlisted Bookings

Figure 6-30 Remove Waitlisted Bookings



If a guest wishes not to remain on the waitlist, you can remove the guest in the Account Handling window using the following steps:

1. At the Account Search, Booking Types, select **Waitlisted Bookings** only.
2. Click the **Remove Waitlisted Bookings** button.
3. At the confirmation prompt, select the appropriate option.

Printing Tickets

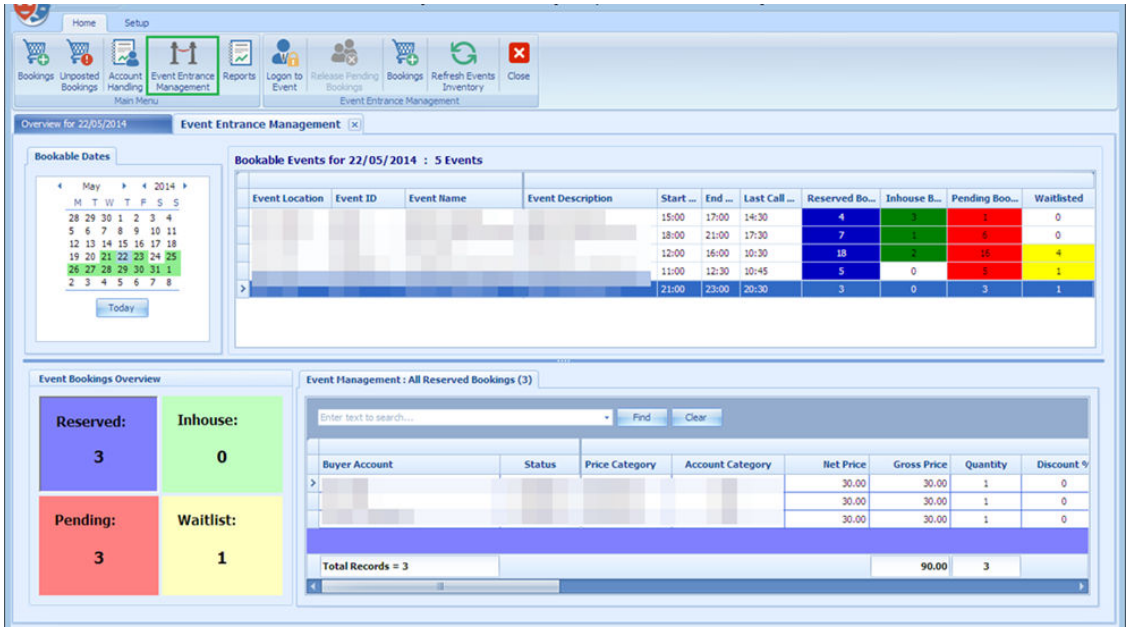
This function allow you to print ticket(s) of the selected account:

1. Select the **booking** to print the ticket.
2. Click **Print Tickets**.
3. At the confirmation prompt, select the appropriate option.

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Event Entrance Management

Figure 6-31 Event Entrance Management



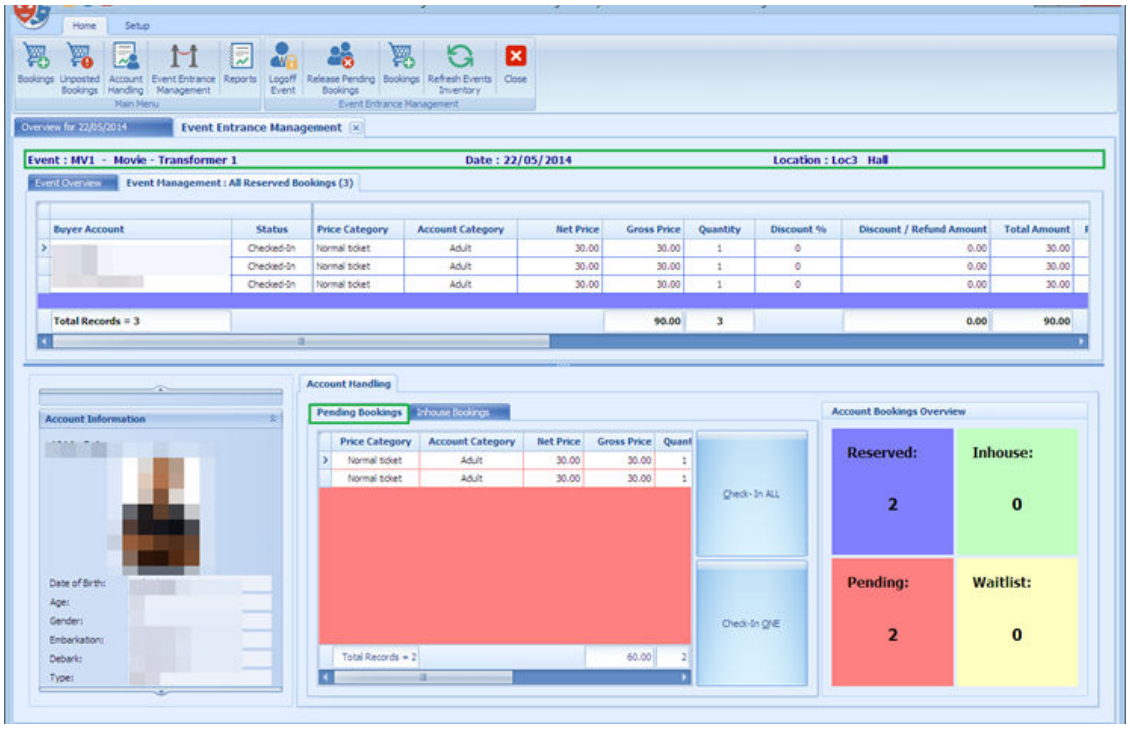
The Event Entrance Management function allows you to pre-register the guest before the show starts. Not only does it allow you to release sold tickets for guest that did not show up, it gives you the flexibility to accept and confirm the waitlist bookings. It also provides you an overview of the event by color coding the statuses such as Reserved, In-house, Pending and Waitlist, and brings up the corresponding guest list when selected.

If the event is a fixed seating type, additional columns such as **Layout Level, Seating Zone, Seat Code** are available in the Reserved, In House, Pending Bookings tabs. The Waitlist tab has two additional columns: Layout Level and Seating Zone.

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Registering a Guest

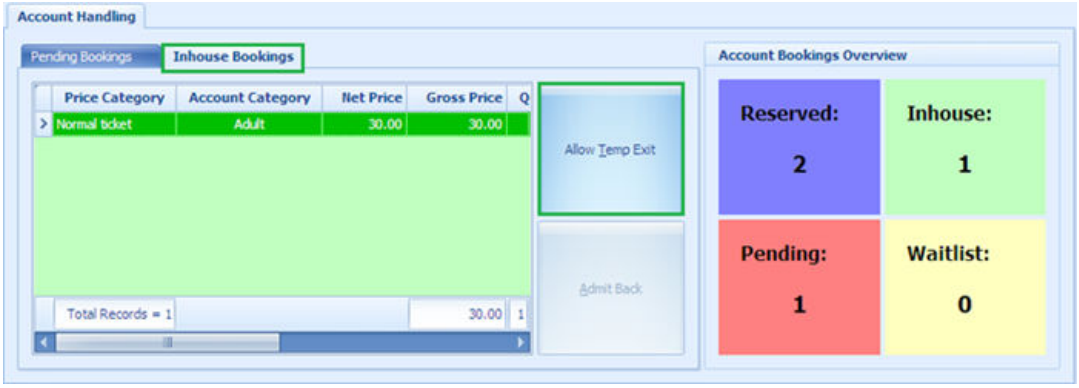
Figure 6-32 Pending Bookings



1. Select the guest cabin **number**.
2. The bookings list shown corresponds to the number of Reserved/Pending Bookings.
3. Select the **record** to Check-In.
4. Select either **Check-In All** or **Check-In One**. Once the guest is checked in, the number of Pending records decreases while the number in the Inhouse increases. The checked-in tickets is appear in the Inhouse Bookings tab.
5. Selecting the **Inhouse Bookings records** will illuminate the Allow Tempt Exit, which permits a temporarily exit from the event.
6. Selecting the **Allow Temp Exit** sets the record line to red color.
7. To re-admit the guest, select the **record** and click **Admit Back**.

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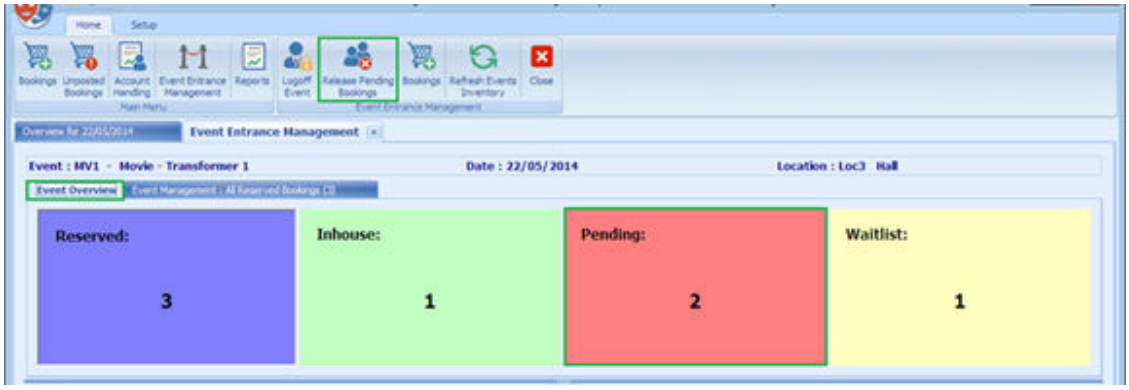
Figure 6-33 Pending Booking — Inhouse Bookings Tab



Release Pending Bookings

This function releases all of the pending bookings of the selected event, enabling you to confirm a waitlist booking, if any.

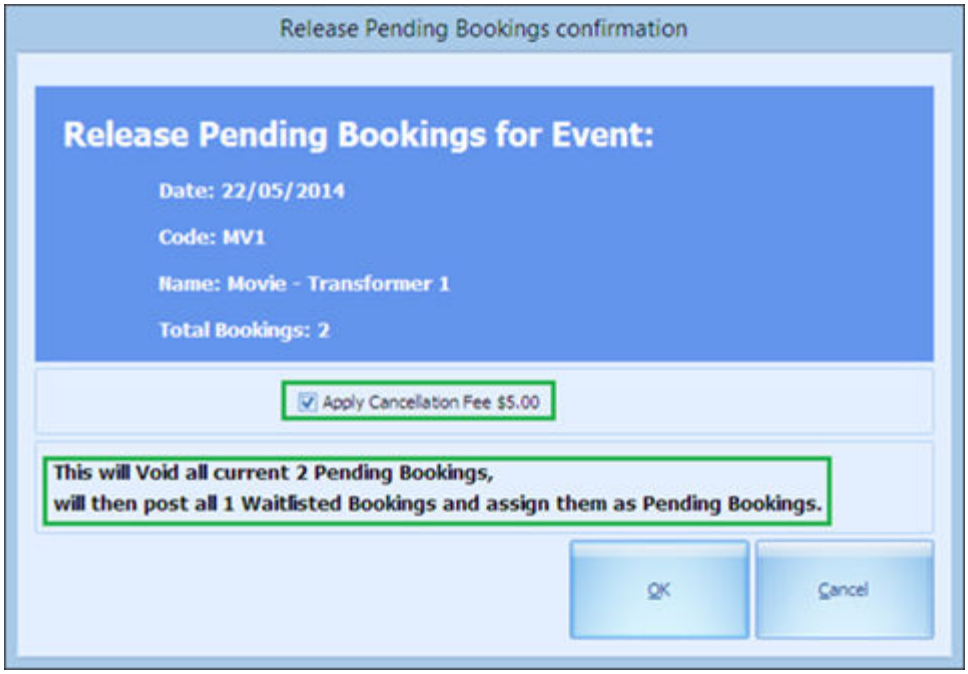
Figure 6-34 Release Pending Bookings



1. Click the **Release Pending Bookings**.
2. The system prompts the number of bookings to release.
3. The **Apply Cancellation Fee** is selected by default. Deselect if the fee is not applicable.

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Figure 6-35 Release Pending Booking Fee

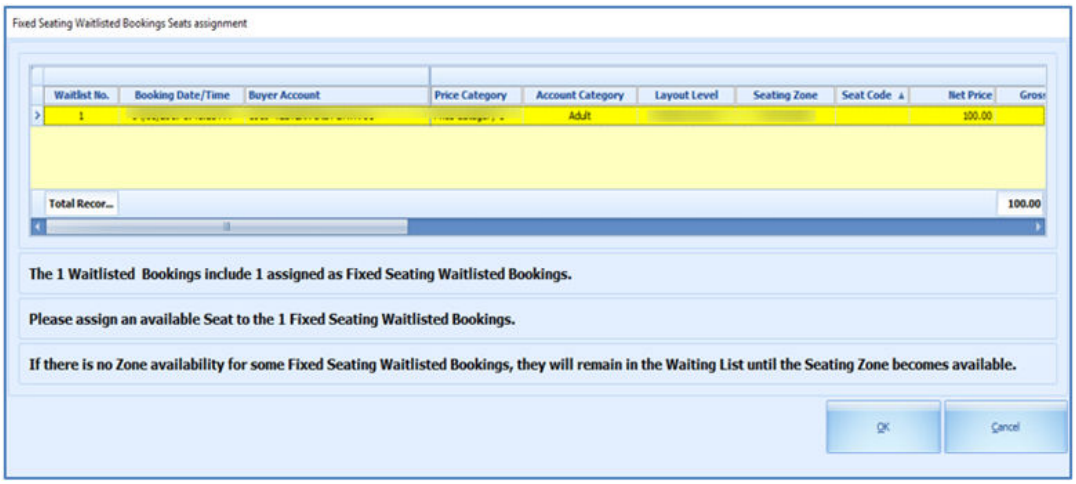


4. Click **OK** to process the release.

> **Warning**
>
> You cannot reverse the process once the system releases the pending booking other than rebooking. The system will convert the waitlisted booking to pending, if any.

5. The seat assignment window below prompted if you are releasing a booking from a Fixed Seating event.

Figure 6-36 Waitlisted Booking Seat Assignment



6. Right-click the **waitlisted booking** from the grid and select the **Assign Seat** option. This launches **Step 2: Select Seats** wizard.

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7. Proceed to select a seat and confirm the booking. This releases all pending bookings and moves the waitlisted booking to pending bookings.
8. The rules for moving waitlisted bookings to pending bookings is the same as the rules for the Free Seating event.

Reports

The Report function gives you the option to view, print or export all the reports available in the system.

1. Click the **Reports** button at the ribbon bar to view all the available reports.
2. Expand the report group and select the desire report.
3. At the Print tab, select the **Printer** and the **number of copies** to print.
4. To preview the report before printing, go to the **Preview** tab.
5. At the ribbon bar, you can perform these functions by selecting **Export**, **Custom Excel Export**, or **Search Report,** or close the screen.

User Access Rights

Table 6-4 User Access Rights

Security Reference Number	Description
991	Print tickets
992	Export Tickets to File
3368	Enable Kiosk Events Sales
3367	Enable ITV Events Sales
3363	Disable All Events Sales
3364	Disable ITV Events Sales
3365	Disable Kiosk Events Sales
3366	Enable All Events Sales
3359	Copy Location's Bookable Events into another Date
3358	Remove Bookable Event
3357	Copy Bookable Event
3362	Remove Date Bookable Events
3361	Copy Date's Bookable Events into another Date
3360	Remove Location Bookable Events
3356	New Bookable Event
3355	Remove Location Event Templates
3352	Copy Event Template into Bookable Date
3354	Copy Location's Event Templates into Bookable Event Date
3353	Create Multiple Event Templates
3351	Remove Event Template
3350	New Event Template

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Table 6-4 (Cont.) User Access Rights

Security Reference Number	Description
3370	General Info tab
3373	Kiosk tab
3371	Pricing and Sales tab
3372	Printing tab
3374	Interactive TV tab
3380	Edit Location
3405	Allow Posting Event Tickets for Crew
3400	Prepaid/Routed Bookings checkbox
3406	Enable Event Overbooking
3402	Void Unposted Bookings
3403	Print and Post
3404	Post only
3401	Add Discount on Unposted Bookings
3411	Void Bookings
3410	Apply Discount
3416	Remove Discount
3418	Remove Waitlisted Bookings
3415	Apply Discount
3417	Void Bookings
3425	Void selected Bookings
3423	Post selected Bookings
3420	Print and Post All Bookings
3421	Print and Post selected Bookings
3424	Void All Bookings
3422	Post All Bookings
3435	Move Bookings
3431	Remove Discount
3432	Void Bookings
3430	Apply Discount
3434	Print Tickets
3433	Void Cancellation Fees
3446	Move Waitlisted Bookings
3443	Shift Waitlisted Bookings
3445	Print Info Tickets
3444	Rearrange by Booking Date and Time
3440	Post to Account and Print Tickets
3441	Post to Account only
3442	Remove Waitlisted Bookings
3463	Remove Waitlisted Bookings

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Table 6-4 (Cont.) User Access Rights

Security Reference Number	Description
3461	Remove Discount
3465	Print Summary
3460	Apply Discount
3462	Void Bookings
3464	Print Tickets
3466	Void Cancellation Fees

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Part III
Crew

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7 Crew

The Crew module is an essential component of the SPMS, handling crew reservations, cabin assignments, check-ins, invoicing, and other voyage-related requests.

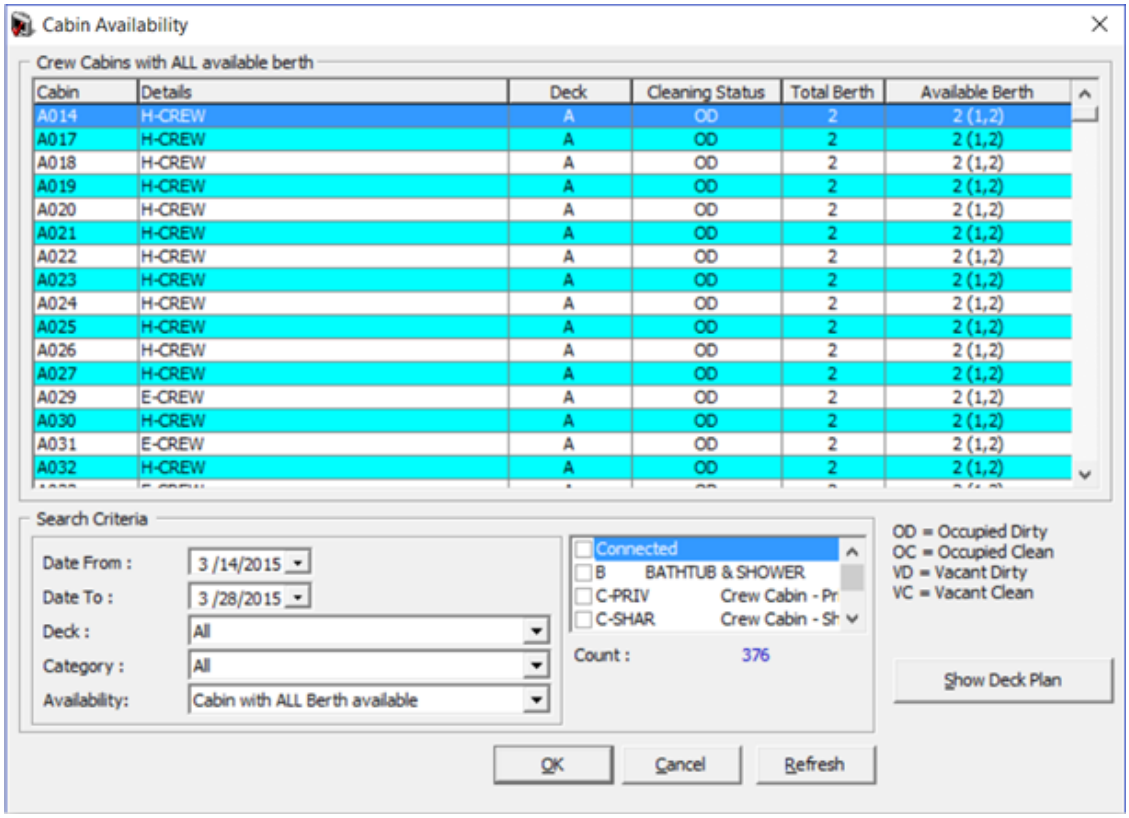
Overview

The Crew Overview Menu is comprised of the functions that provide an overview of the Cabin Availability, Cabin Overview, Comments, Flights, and the ability to add Work Orders related to the cabin. The function is accessible by launching the Crew module from the Launch Panel.

Cabin Availability

Cabin Availability provides an overview of cabin availability by date, deck, category, and/or features, including a view by deck plan along with the current cabin cleaning status and the number of available berths.

Figure 7-1 Cabin Availability

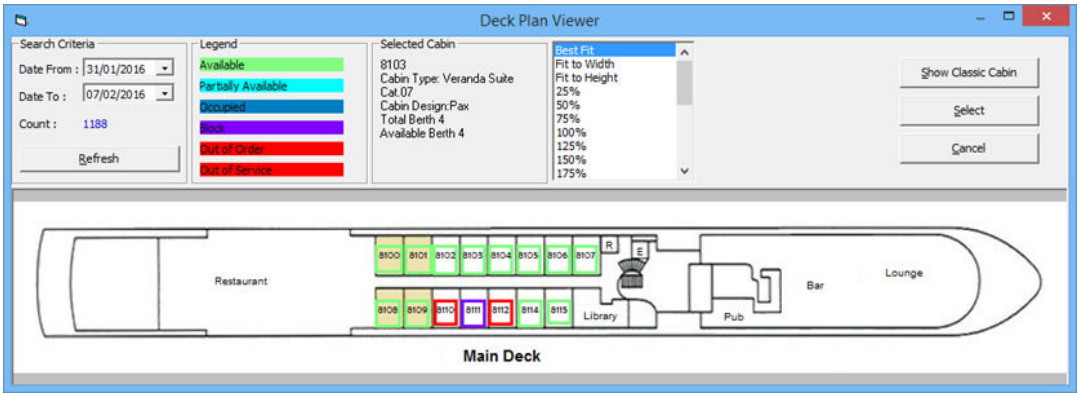


1. From the Overview menu, select **Cabin Availability**.

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2. In the Selection Criteria, select the **Date From/To, Deck**, and **Category** from the drop-down list.
3. Select the **Cabin Features** using the checkbox, if any.
4. Click **Refresh** to refresh the view.

Figure 7-2 Deck Plan Viewer

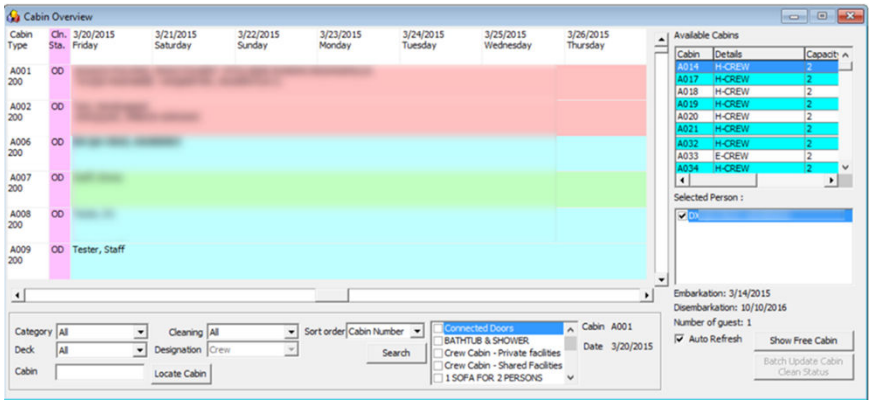


5. From the Cabin Availability window, click **Show Deck Plan**.
6. In the Selection Criteria, enter the **Date From/To**, and click **Refresh**.
7. The status of the cabin is indicated by the color chart. Information about the selected cabin appears in the **Selected Cabin** section.

Cabin Overview

The Cabin Overview lists all cabins by cabin clean status, date, category, and the occupant's name. You can update the cabin clean status in batches within the same window.

Figure 7-3 Cabin Overview Window



Navigating through Cabin Overview

In the Overview window, the cabin numbers and category are listed, followed by the cabin cleaning status and occupant's name in the next column. If the cabin is occupied or blocked for expected guest, the passenger name appears in the grid from the date of embarkation to the

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date of disembarkation. You can use the filter options to search for a specific category or cabin in a particular cleaning state. In the Available Cabins, the cabins with crew name are shown when the crew name field is checked.

Batch Update of Cabin Clean Status

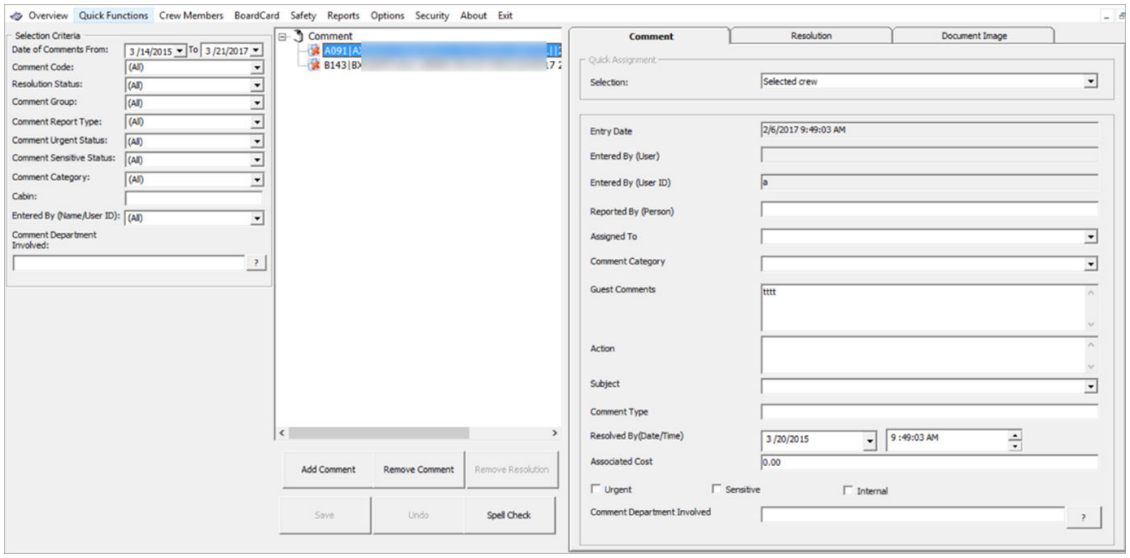
You can update the cabin status by batch using the available filters.
In the Cabin Overview window, click **Batch Update Cabin Clean Status**.

1. In the Batch Update Cabin Clean Status window, select the **category** or **deck**, followed by the **cleaning status**, and click **Search**.
2. Cabins matching the criteria will appear. Select the **cabin** by checking the checkbox next to the cabin number or use **Select All** to select all the checkboxes.
3. Select the **Clean Status** from the drop-down list, and click **Update**.

Comments Overview

The Comments Overview allows you to view and edit all comments entered in the Crew Handling function, as well as add new comments.

Figure 7-4 Comments Overview Window



1. From the Overview menu, select **Comments Overview**.
2. In the **Selection Criteria**, select from the available filters for information to display, and click **Refresh**.
3. Information matching the selection appears in the Comment section. To view comments, select a comment.

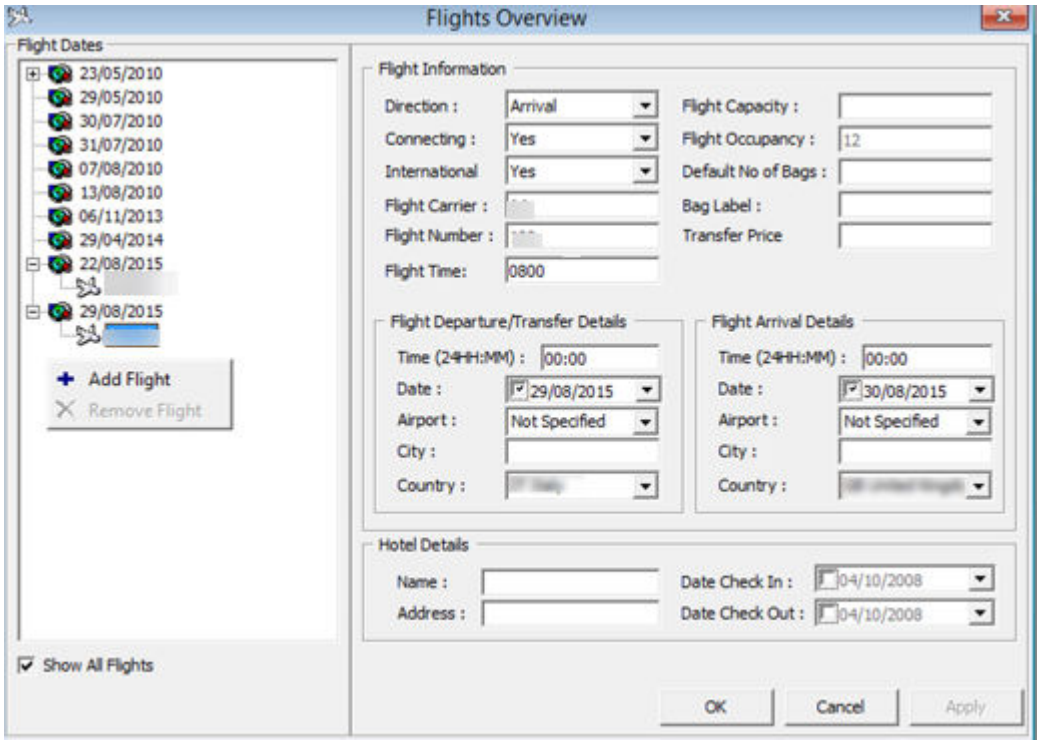
See *Comments Tab* section on how to add or remove a comment.

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Flights Overview

This function enables you to set up arrival or departure flights, which allows you to plan your resources and organize ground transfers for crew and passengers where necessary. To access the function, select **Flights Overview** from the Overview menu.

Figure 7-5 Flight Overview Window



Adding / Removing Flight Information

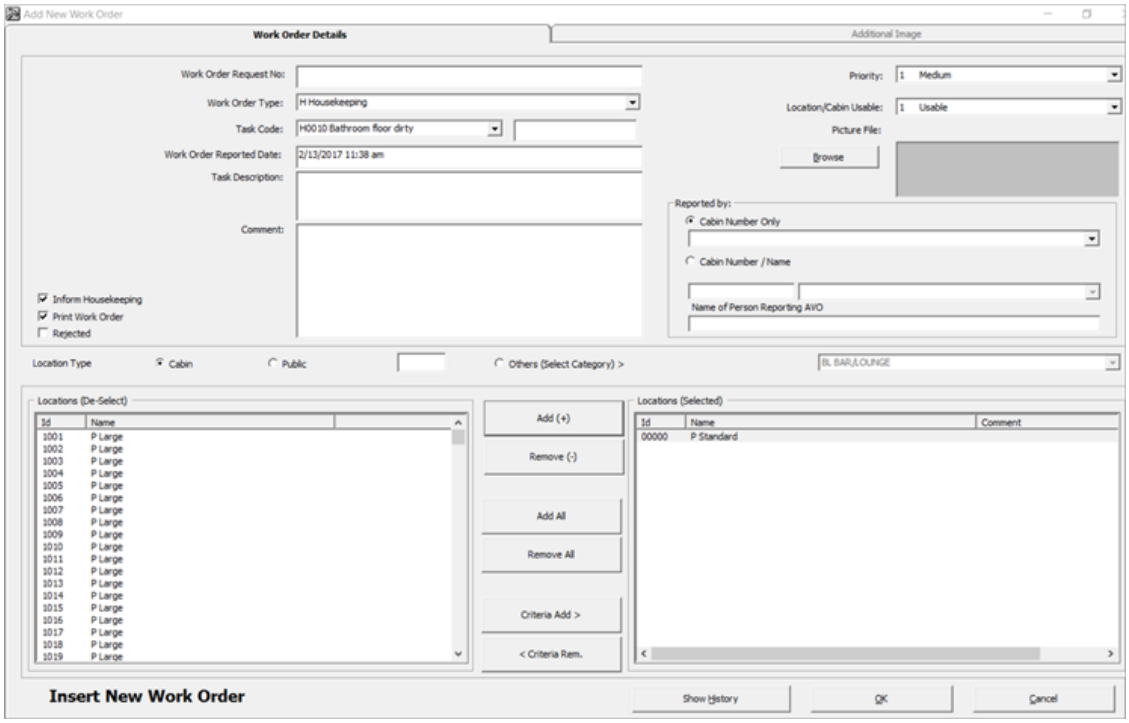
1. In the Flight Dates section, right-click and select **Add Flight**.
2. In the Flight Information section, enter all the necessary information and click **OK** to save.
3. To remove flight information, select and right-click the **Flight Number** and select **Remove Flight**.

Add Work Orders

You can add work orders individually or by batch using the Criteria Add function. Entry of work orders is not limited to the Crew module, and this function is available in the Maintenance module and Management module, Front Desk, and in Add Work Order.

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Figure 7-6 Add new Work Order Form



Adding a Single Work Order

1. From the Overview menu, select **Add Work Orders**.
2. In the Work Order Details tab of the Add New Work Order form, enter the external document number in the **Work Order Request No.** field, if any.
3. Select from the drop-down list the **Work Order Type, Task Code** and enter the **Task Description** and **Comment**.
4. Select the **Priority** and **Location/Cabin Usable Status** from the drop-down list and attach a picture file, if any. You can override the predefined Priority and Location Usable Status when adding or editing a work order.
5. In the Reported By section, select the **Cabin number** and enter the **Name of Person reporting AVO**.
6. Select the **Location Type**, either **Cabin, Public** or **Others (Select Category)**, and navigate to the Location section and select the exact **location** from the grid.
7. Click **Add** to add the location to Location (Selected) section.
8. To de-select the location from Locations (Selected), mark the item to remove and click **Remove (-)** or **Remove All**.
9. Click **OK** to save the work order.

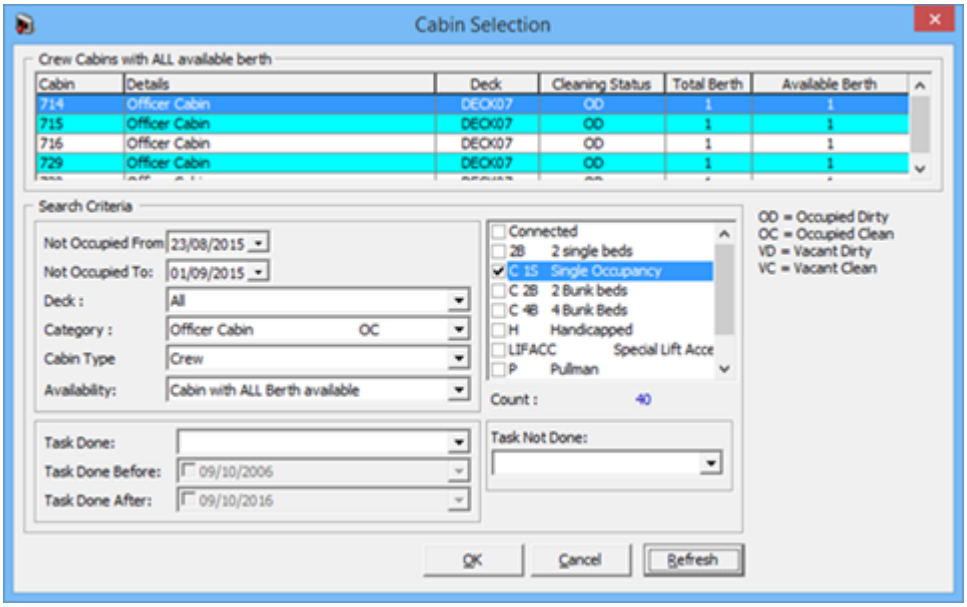
Adding Work Orders by Batch

1. Repeat steps 1 to 6 of Adding Single Work Order.
2. Click **Criteria Add>** to launch the Cabin Selection window.

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3. In the Cabin Selection window, **Search Criteria** section, select the criteria from the drop-down list and check the required filter.
4. Click **Refresh** to update the information in the grid.

Figure 7-7 Cabin Selection Criteria



5. Click **OK** to add the selection to Locations (Selected).
6. To de-select the location from **Locations (Selected)**, mark the item to remove and click **Remove (-)** or **Remove All**.
7. Click **OK** to complete the work order.

Quick Functions

The Quick Function is designed to facilitate and expedite billing processes during disembarkation, assigning of crew course and certificates, flight arrangements and many others.

Quick Billing

The Quick Billing function allows you to expedite the check-out processes during disembarkation, and invoices to be printed in batches using the available criteria. Function is accessible from **Quick Functions** menu.

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Figure 7-8 Quick Billing Selection Criteria Window

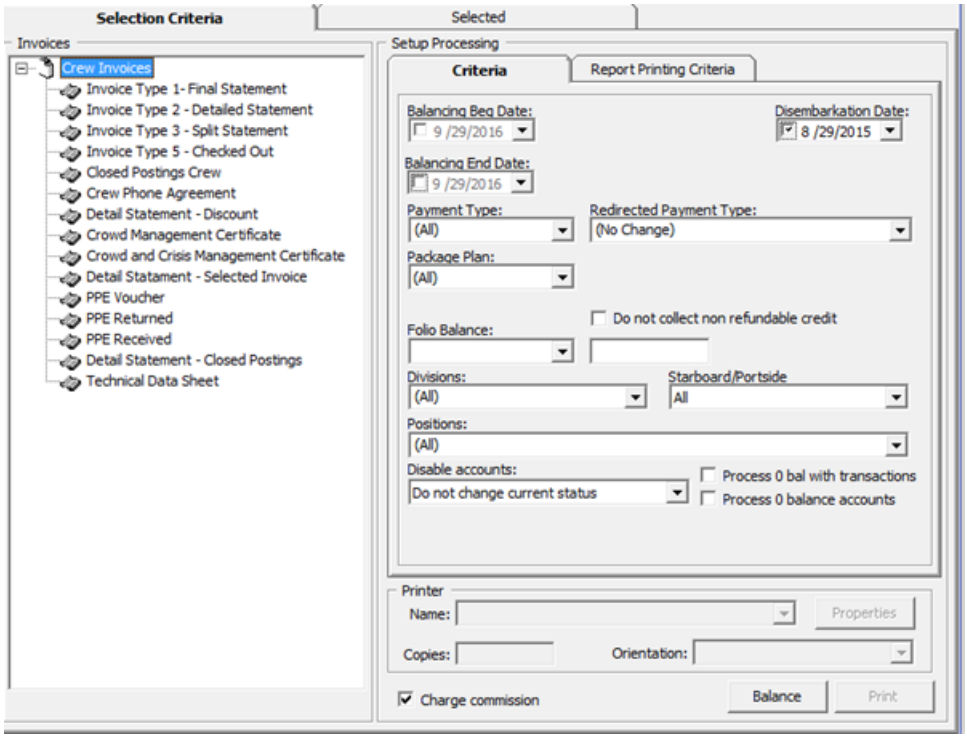


Table 7-1 Field Definition of Quick Billing Window

Field	Description
Crew Invoices	Type of invoice form.
Balancing Begin Date	Date to balance from.
Balancing End Date	Date to balance until.
Disembarkation Date	Disembarkation Date filter.
Payment Type	Payment type filter.
Redirected Payment Type	Redirect selected payment to another payment method.
Package Plan	Filter by Package Plan.
Folio Balance	Filter by folio balance, for example, greater than or equal to X value.
Do not collect non-refundable credit	Credit balance withheld for use in future cruise.
Divisions	Invoice sort order by division.
Starboard/Portside	Invoice sort order Starboard/Portside.
Positions	Invoice sort order by position.
Disable accounts	Update account status to "allow manual postings only" or "blocked all postings".
Process 0 bal with transactions	Include guests who haves already settled in and allow a reprint of the invoice in Quick Billing window.

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Table 7-1 (Cont.) Field Definition of Quick Billing Window

Field	Description
Process 0 balance accounts	Include zero balance accounts with/without transactions.
Printer	Printer assigned for invoice printing, number of copies to print and print orientation.

Figure 7-9 Quick Balance Selected Tab

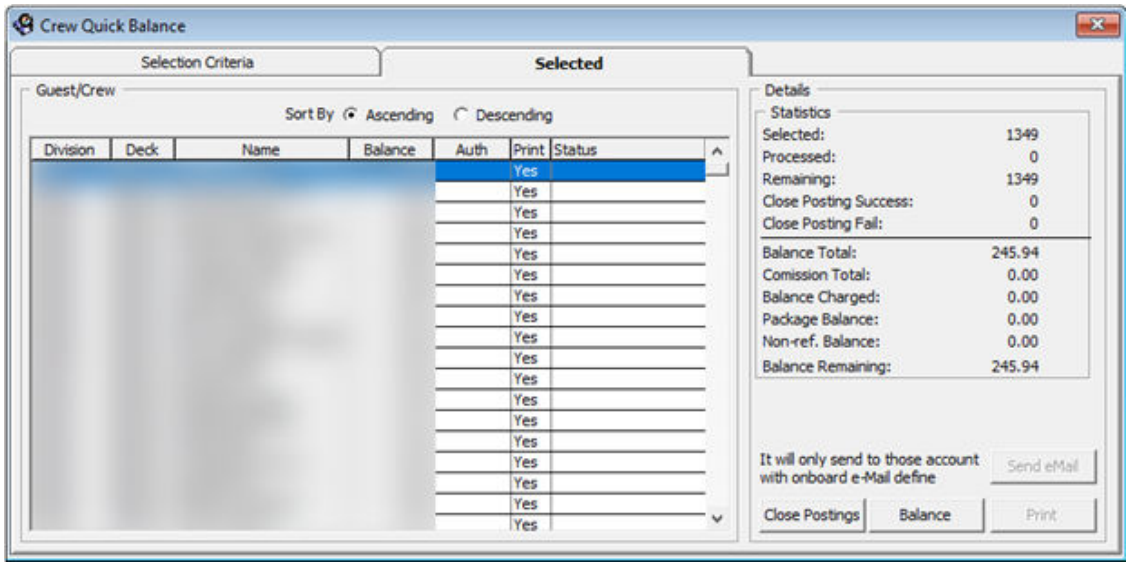


Table 7-2 Field Definition of Crew Quick Balance

Field	Description
Division	Division number.
Deck	Location of Cabin.
Name	Crew Name.
Balance	Total Invoice Balance.
Auth	Authorization Status.
Print	Invoice Printed status.
Status	Close Posting status or Invalid Address validated during Balance process.
Statistics	Indicator count of selected, processed, remaining and close postings (successful/failed) accounts with its value in balance or charged.
Send eMail	Invoices are emailed to crew on-board email account.
Close Postings	Set invoice postings to close.
Balance	Process balancing for selected accounts.
Print	Print invoices for selected accounts

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Crew Quick Billing

Quick Bill Printing

The Selection Criteria tab in the Crew Quick Billing function determines the type of invoices to print/pay based on the criteria entered for all disembarking crews. For example, crew paying by credit card or only crew with x outstanding amount.

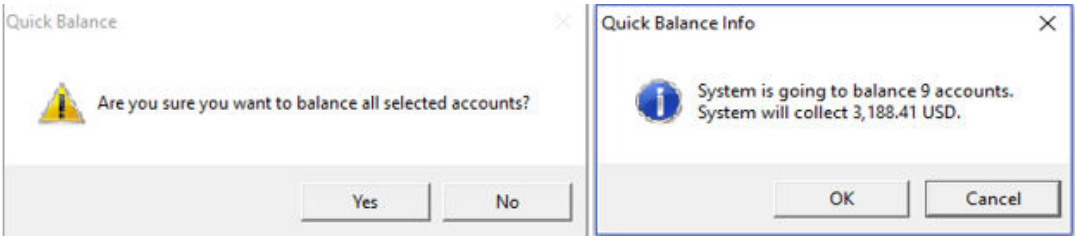
1. From the Quick Billing, Selection Criteria tab, select an **Invoice Type, Balancing Begin Date, Disembarkation Date, Payment Type, Folio Balance (if applicable), Division, and Position**.
2. At the **Printer** section, select an invoice printer, enter the number of copies to print, select the print orientation, and click **Print**.
3. At the Quick Printing prompt, select **Yes** to continue.

Quick Bill Balance

Apart from printing invoices by batch, balancing of the new crew account is only possible when there is a credit card on file.

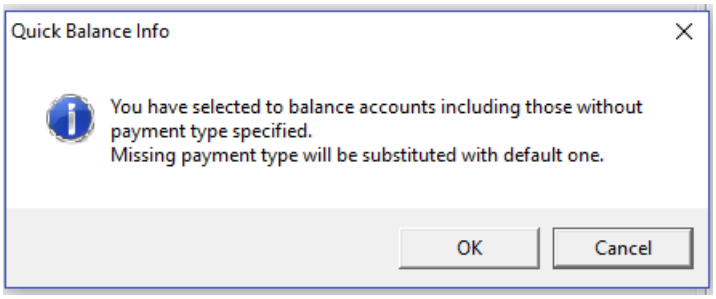
1. Repeat steps 1 to 3 of the above.
2. In the **Disable accounts** field, select the appropriate **Posting status** from the drop-down list.
3. Navigate to the **Selected tab** to verify the results and adjust the selection until you achieve the desire result.
4. To exclude a crew from the search results, right-click on the name, and click **Remove**. When a crew is removed from the grid, the statistic count is updated accordingly.
5. At the Confirmation prompt, click **Yes** to confirm and click **Balance**.
6. At the Quick Balance prompt, select **Yes** and click **OK** at the Quick Balance Info prompt.

Figure 7-10 Quick Balance Info Prompt



7. In the Quick Balance Info warning prompt, read the warning, and click **OK** to proceed.

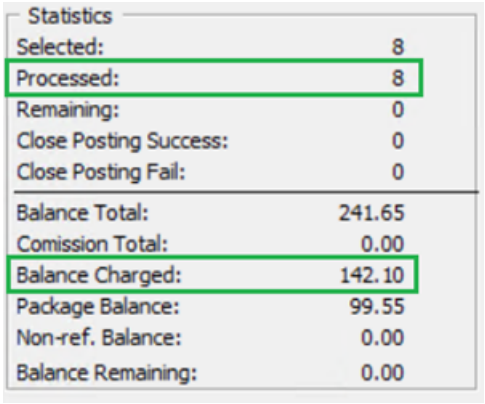
Figure 7-11 Quick Balance Info Window



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8. The total amount charged and the number of the account processed appear in the Statistic section once the account is balanced successfully.

Figure 7-12 Statistic of Account Processed and Value Charged



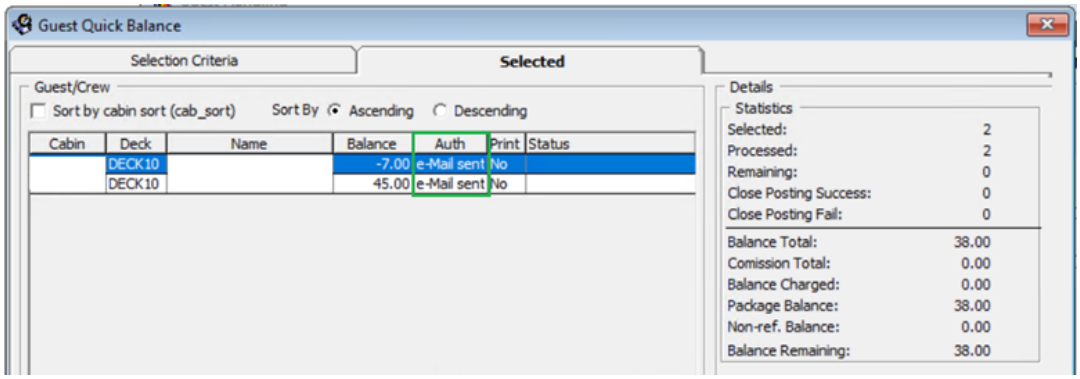
9. Click **Close Postings** to disallow postings as close on these accounts.

Quick Bill eMail

All Crew that haves an on-board email account can opt to receive a copy of their invoices through email. This function is controlled by a parameter. Consult your IT Department for setup if this is not pre-configured.

1. Repeat steps 1 to 4 of Quick Bill Balance.
2. Navigate to the **Selected tab** and click **Send eMail**. The Send eMail feature is disabled if no printer is assigned.
3. Without balancing the invoice, click **Send eMail**.
4. At the Quick Printing prompt, click **Yes** to proceed. An ‘e-Mail sent’ status is added in the **Auth** column when the invoice is sent successfully.

Figure 7-13 Invoice Successfully Emailed Indicator

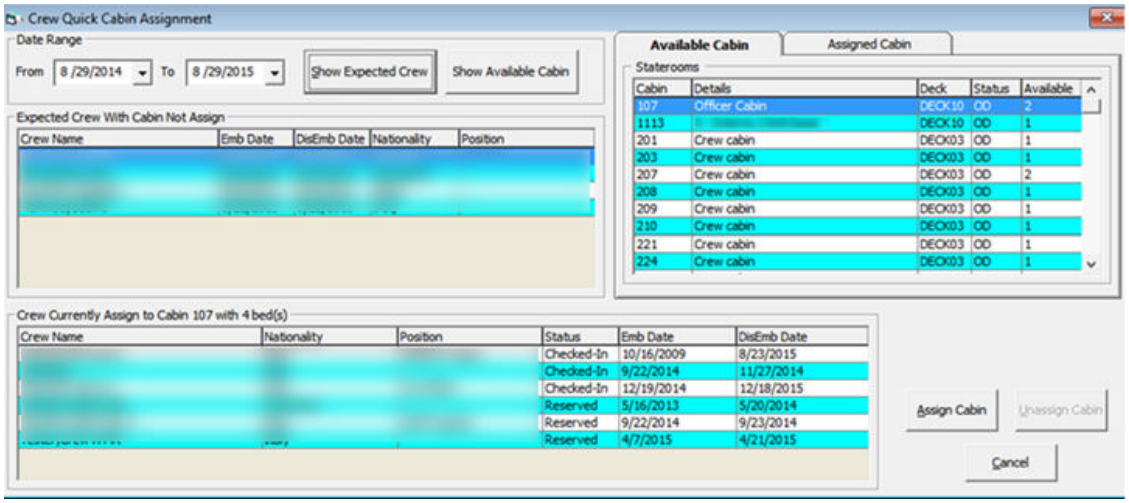


Crew Quick Cabin Assignment

The Crew Quick Cabin Assignment function allows you to assign or un-assign cabins individually or by a group of crews based on available cabins or by cabins that haves crew assigned.

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Figure 7-14 Invoice Successfully Emailed Indicator Quick Cabin Assignment Window



Assigning a Cabin

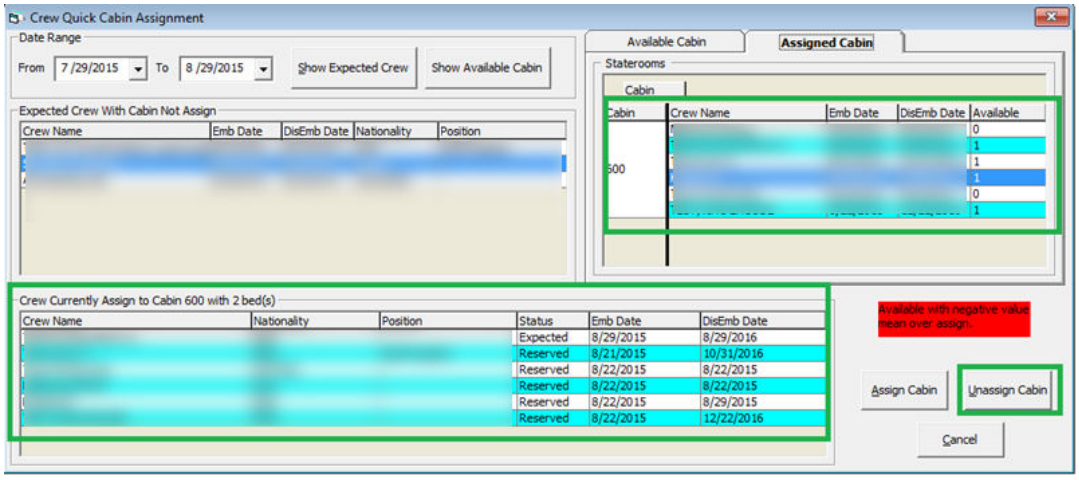
1. From the **Quick Functions**, select **Crew Quick Cabin Assignment**.
2. Select the **Date From and Date To** using the date editor, then click the **Show Expected Crew**. The expected crew that do not have a cabin assign appear in the **Expected Crew With Cabin Not Assign** grid.
3. Available cabins are shown in the Available Cabin section. Selecting any cabin from the grid will show the cabin assignment history of Checked-In and Expected crew in the Crew Currently Assign to Cabin xxx with x bed(s) **grid**.
4. Navigate to the Assigned Cabin tab to view all cabins assigned to crew. The cabin assignment history of Checked-In and Expected Crew appears in the Crew Currently Assign to Cabin xxx with x bed(s) grid when a cabin is selected.
5. Select the crew and the cabin from either the Available Cabin or Assigned Cabin and click the **Assign Cabin**. The assigned crew cabin appears in the Crew Currently Assign to Cabin xxx with x bed(s) grid.
6. Another option for assigning a cabin is by clicking **Show Available Cabin**. This function displays only the cabins without an assignment, and in the Available Cabin tab, a list of available staterooms appears in the grid. Cabin management history for Checked-In and Expected Crew are then shown in the Crew Currently Assign to cabin xxx with x bed(s).
7. Repeat step 3 to 5 of the above to assign a cabin.

Un-assigning a Cabin

1. Repeat steps 1 to 2 of Assigning a Cabin.
2. Navigate to the Assigned Cabin tab to view all cabin assigned to crew.
3. Select the cabin from the Staterooms list to display the crew assignment history for Checked-In and Expected Crew who are shown in the Crew Currently Assign to Cabin xxx with x bed(s) grid.

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Figure 7-15 Assigned Cabin Window

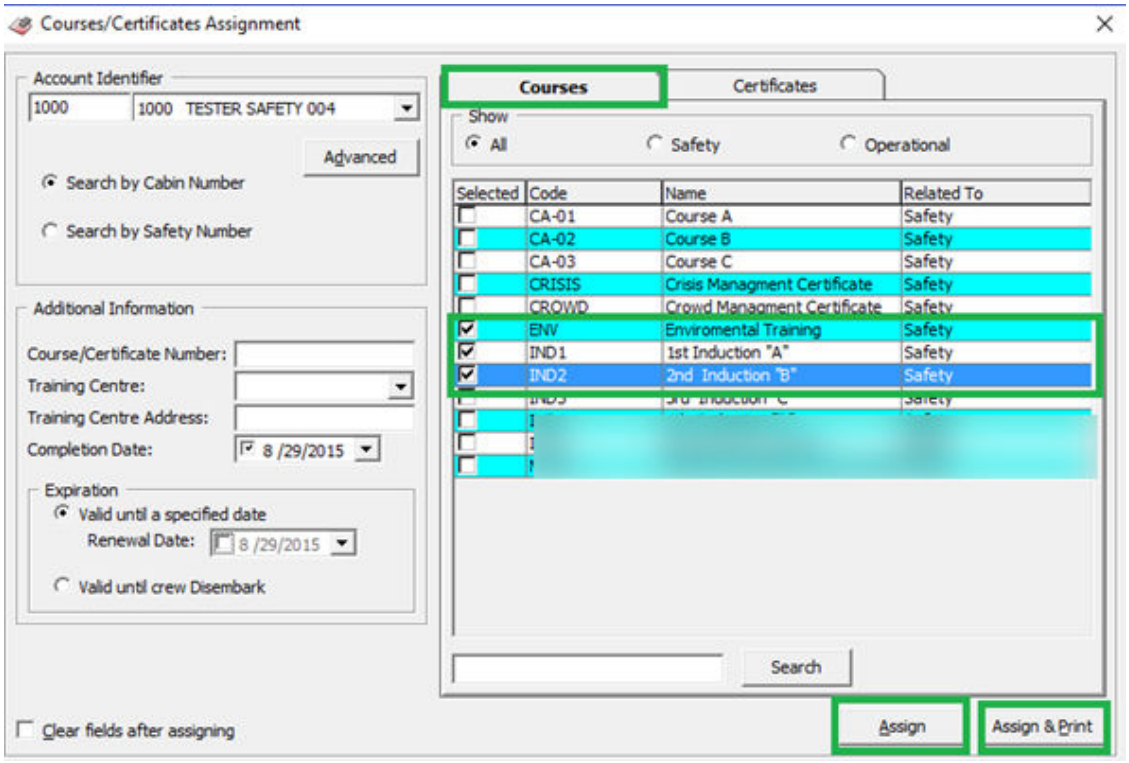


4. Select crew from the Staterooms grid or Crew Currently Assign to Cabin xxx with x bed(s) grid, then click **Unassign Cabin** to un-assign the cabin for the crew.

Quick Courses Assignment

The Quick Courses Assignment function enable you to assign crew courses and certificates.

Figure 7-16 Courses Assignment Window



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Table 7-3 Field Definition of Courses/Certificate Assignment Window

Field	Description
Code	Courses/ Certificates codes set up in Administration module.
Name	Course/Certificate Name.
Related To	Category the course belongs to in Safety/ Operational.

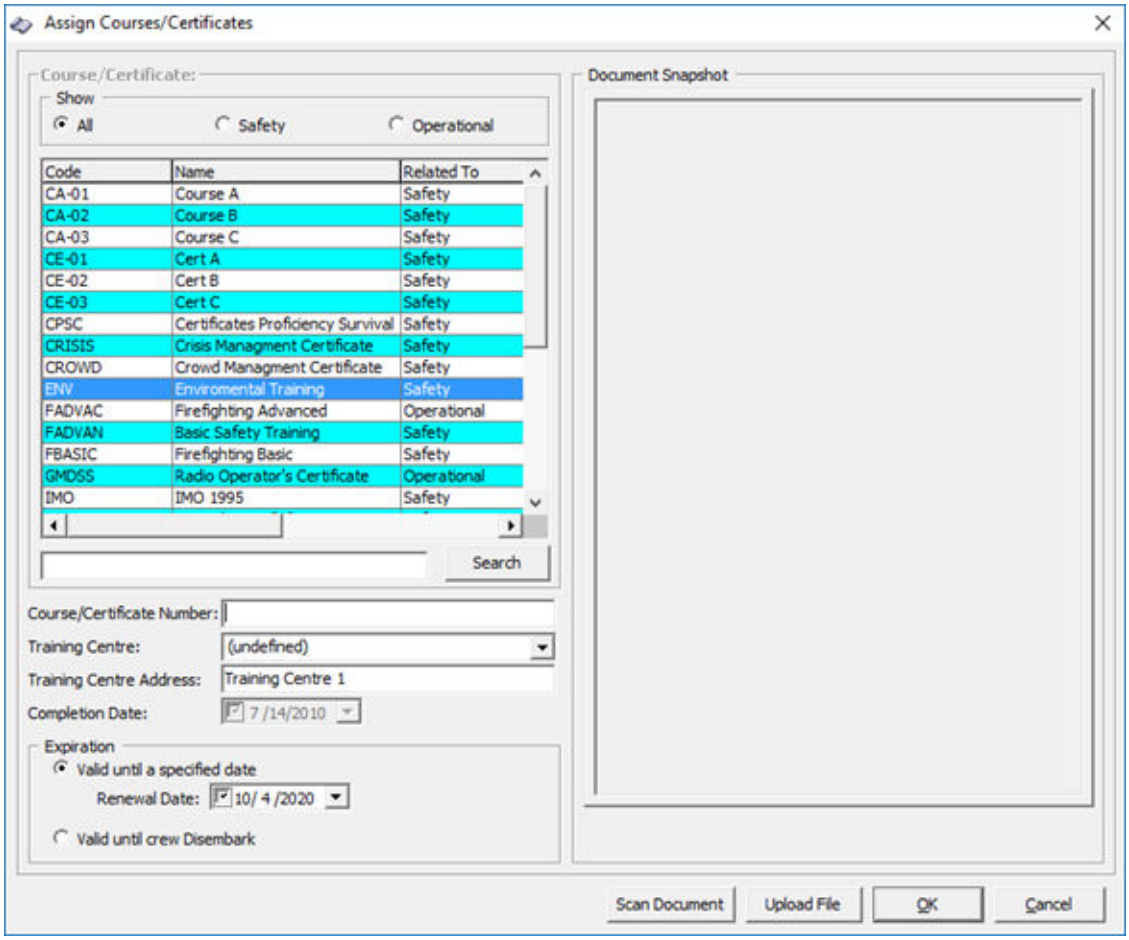
Courses Assignment

1. From the Quick Functions file menu, select **Quick Courses Assignment**.
2. Navigate to the **Courses** tab and select the type of course to assign by selecting the checkbox beside the code.
3. In the Account Identifier section, select either **Search by Cabin Number** or **Search by Safety Number**.
4. In the Additional Information section, fill in the Additional Information if any.
5. Select the **Completion Date** and select the **date** from the date editor.
6. Select the course expiration period either by selecting the **Valid until a Specified Date** or **Valid until Crew Disembark**. If the Valid until a Specified Date is selected, select the **Renewal Date** and select the **date** from the date editor.
7. Select **Assign** to assign the courses and click **Assign & Print** to assign the course assigned at the same time.
8. Courses can be searched using the Search Panel below the course grid.
9. Selecting the **Clear fields after assigning** checkbox clears all details after the course assignment completes.

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Certificates Assignment

Figure 7-17 Certificates Assignment Window



1. From the **Course/Certificates Assignment** window, navigate to the **Certificates** tab and select the **course** to assign by selecting the checkbox next to the code.
2. Repeat above steps 3 to 9.

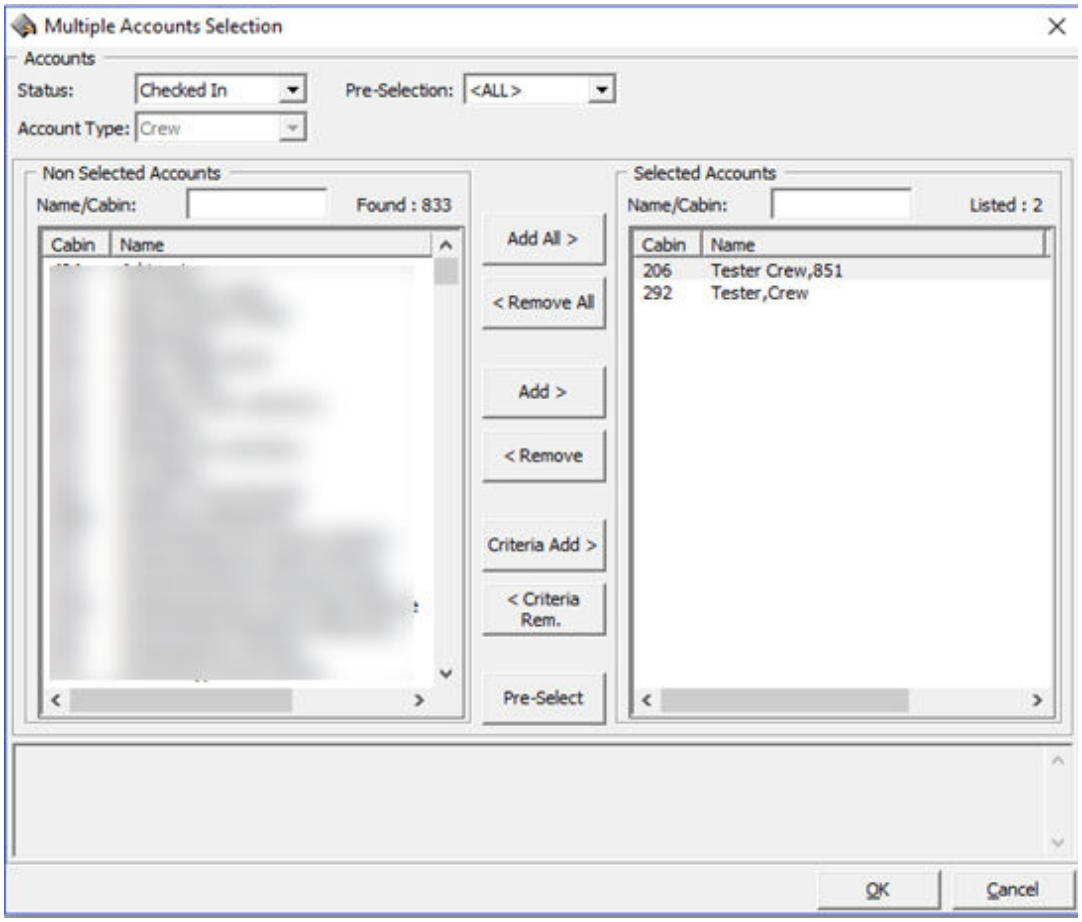
Advanced Courses/Certificates Assignment

The Advanced Course Assignment allows you to assign multiple crew to a course/certificate.

1. Under the Account Identifier section in the Courses/Certificates Assignment window, click **Advanced** to open the **Multiple Accounts Selection** window.
2. Crew listed in the **Non Selected Accounts** section are based on the default setting in the Status and Account Type criteria.

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Figure 7-18 Routing Multiple Account Selection Window



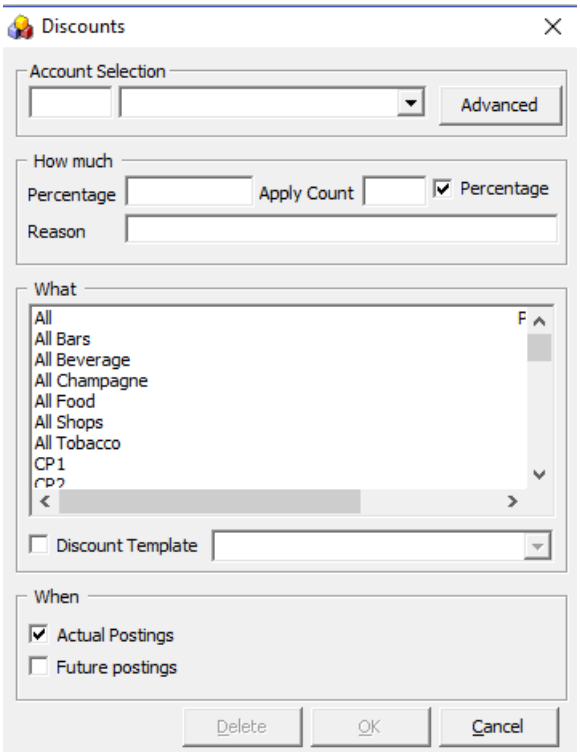
3. Select the **reservation status** of the crew from the Status drop-down list.
4. To select **all crew**, click the **Add All>** button to transfer the crew list to the Selected Account window, or individually select the crew name and click **Add**.
5. Click **OK** to confirm the multiple accounts selection and this opens the **New Courses/ Certificates Assignment** window.
6. The cabin search function under the Account Identifier section is now dimmed and replaced with (multiple selection).
7. Repeat steps 4 to 9 Courses Assignment.

Quick Discounts Assignment

The Quick Discounts Assignment function enables you to assign discounts to multiple crew's accounts, either by percentage or by value.

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Figure 7-19 Quick Discount Window



Assigning Discount to Individual Crew

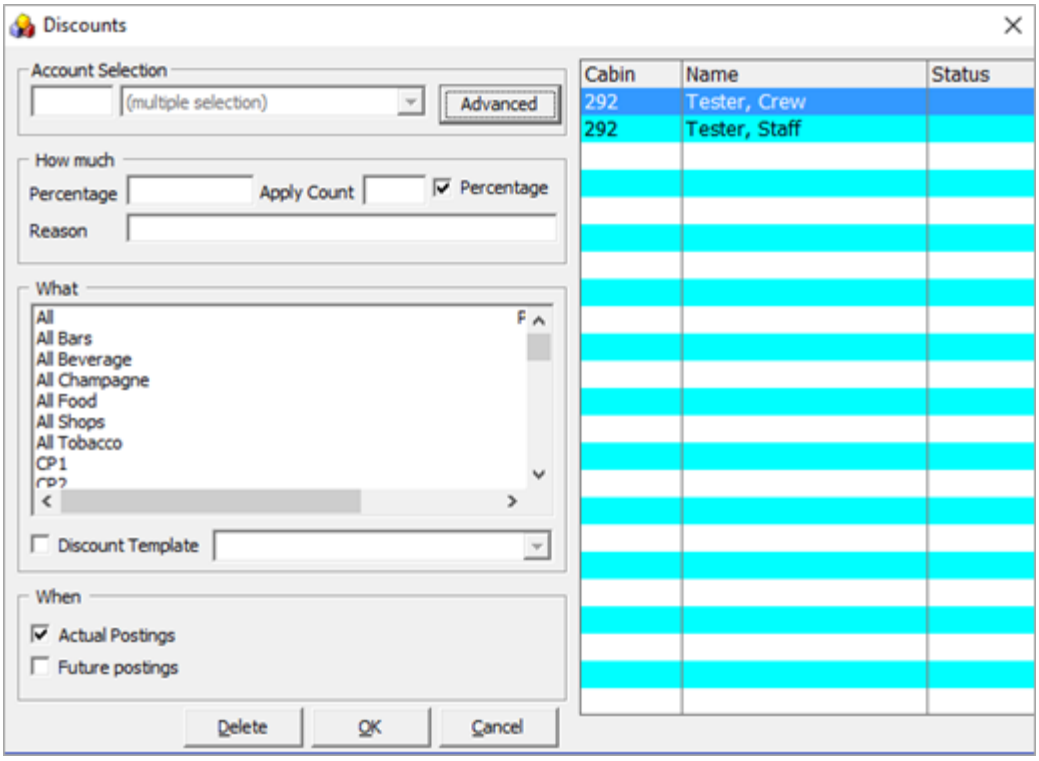
1. From the Quick Functions file menu, select **Quick Discounts Assignment**.
2. In the Discounts window, Account Selection section, enter the cabin number and select the **respective crew** from the drop-down list.
3. Navigate to the How much section and enter the **Percentage, Apply Count** and **Reason**. To apply a value discount, deselect the **check mark** next to Percentage.
4. Select the **department group** or **department code** in the What section, and check whether the discount is applicable to Actual or Future Postings.
5. Click **OK** to confirm.

Assigning Discount to Multiple Crew

1. From the **Quick Functions** option menu, select **Quick Discount Assignment**.
2. In Discount assignment, Account Identifier section, click **Advanced** to open the **Multiple Accounts Selection** window.
3. Crew listed in the Non Selected Accounts section are based on the default setting in Status and Account Type criteria.
4. Select the **reservation status** of the crew from the Status drop-down list.
5. To select all crew, click **Add All>** to transfer the crew list to the Selected Account window, or individually select the **crew names** and click **Add**.
6. Click **OK** to confirm the multiple accounts selection, which opens the New Discounts Assignment window with the selected crew account listed.

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Figure 7-20 Quick Discount to Multiple Account



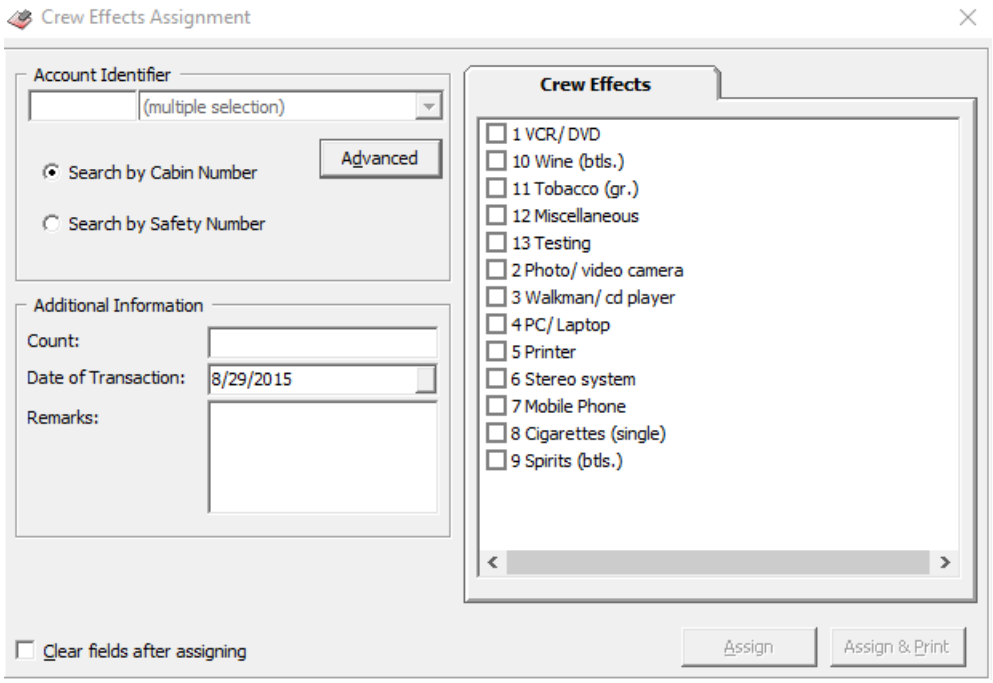
7. Repeat steps 2 to 5 of Quick Discount to Individual Crew by Percentage/Value.

Quick Effects Assignment

The Quick Crew Effects Assignment allows you to record crew's personal effects for single/ multiple accounts.

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Figure 7-21 Quick Crew Effects Assignment



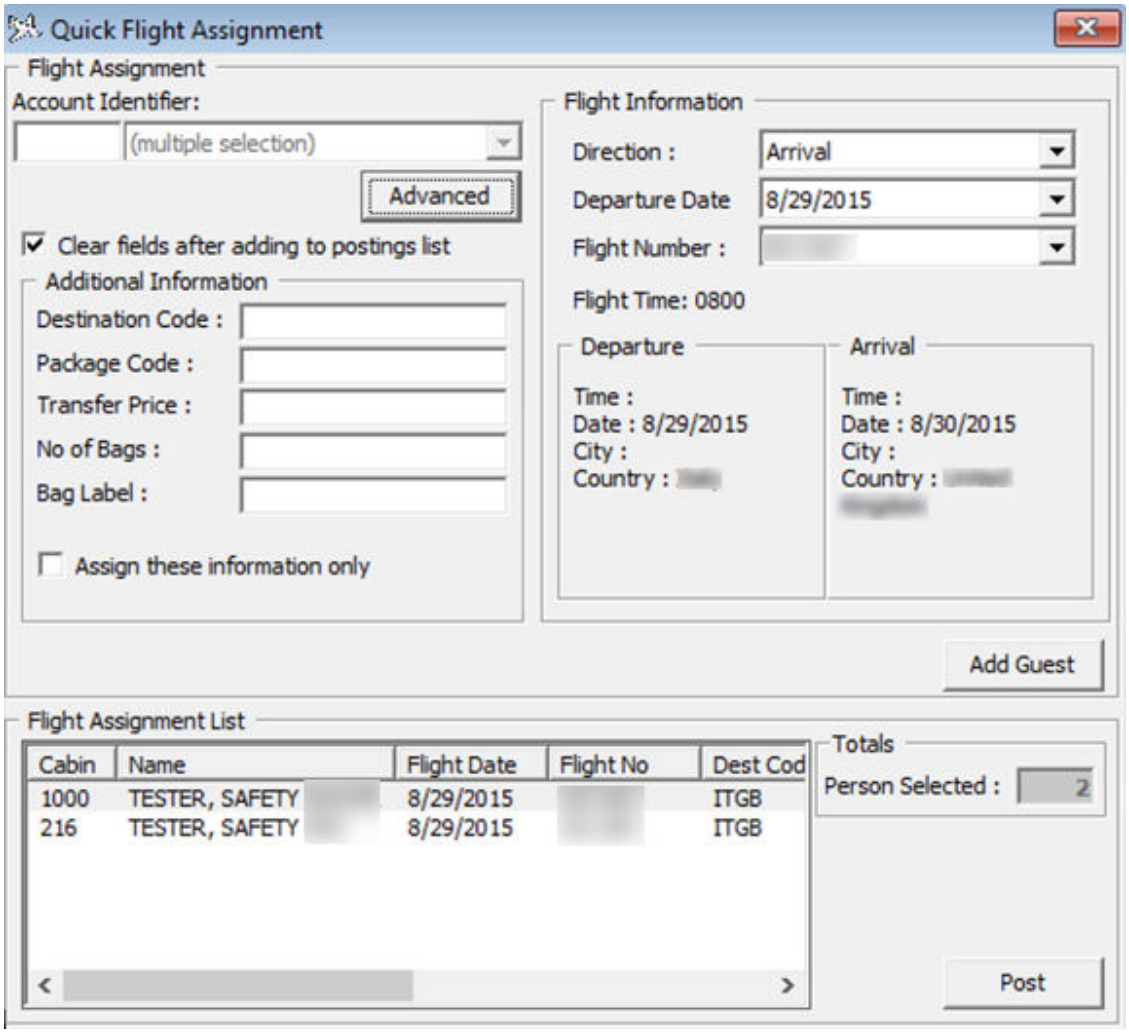
1. From the Quick Functions file menu, select **Quick Effects Assignment**.
2. In the Account Identifier section, select **Search by Cabin Number** or **Search by Safety Number**.
3. In the Additional Information section, **Count** field, enter the number of items, select the **Transaction date** using the date editor and enter a remark if any.
4. Select the **Crew Effects** item by selecting the **item** checkbox. Multiple selections are allowed.
5. Click **Assign** to assign the items or click **Assign & Print** to assign and print at the same time.
6. Select **Clear fields after assigning** to clear all details after completing the assignment.

Quick Flight Assignment

The Flight Assignment function enables you to assign the arrival/departure flight individually or by a group of passengers.

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Figure 7-22 Quick Flight Assignment



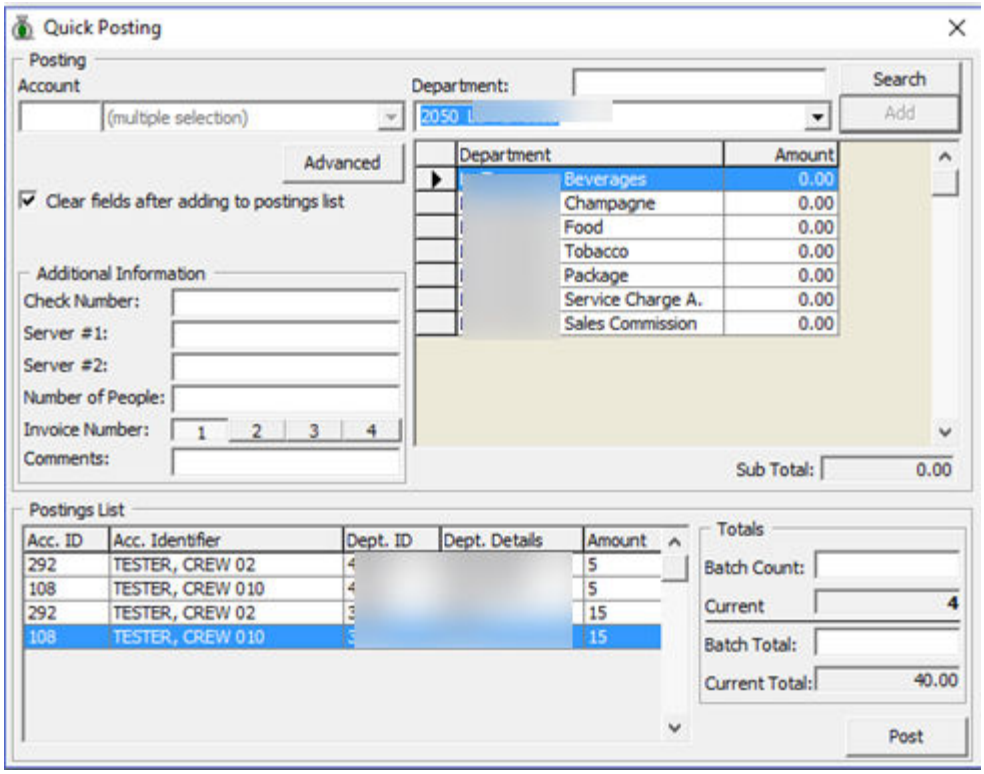
1. From the **Quick Functions** menu, select **Quick Flight Assignment**.
2. Enter the **account** in the Account Identifier field or click **Advanced** to select **Multiple Account**.
3. Navigate to Flight Information section and select the **Direction, Departure Date,** and **Flight Number** from the drop-down list.
4. In the Additional Information section, enter additional information if any.
5. Click **Add Crew** to add the selected crew to Flight Assignment List and take note of the Total count next to the Flight Assignment Last grid.
6. Click **Post** to update the flight assignment in the crew's account in the **Crew Handling, Flight Info tab**.

Quick Posting

The Quick Postings function enables posting by batch to a single account or multiple accounts. This function is extremely useful when there is a large quantity of checks such as laundry or transportation to be posted at the same time.

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Figure 7-23 Quick Posting



Quick Posting to Single Account

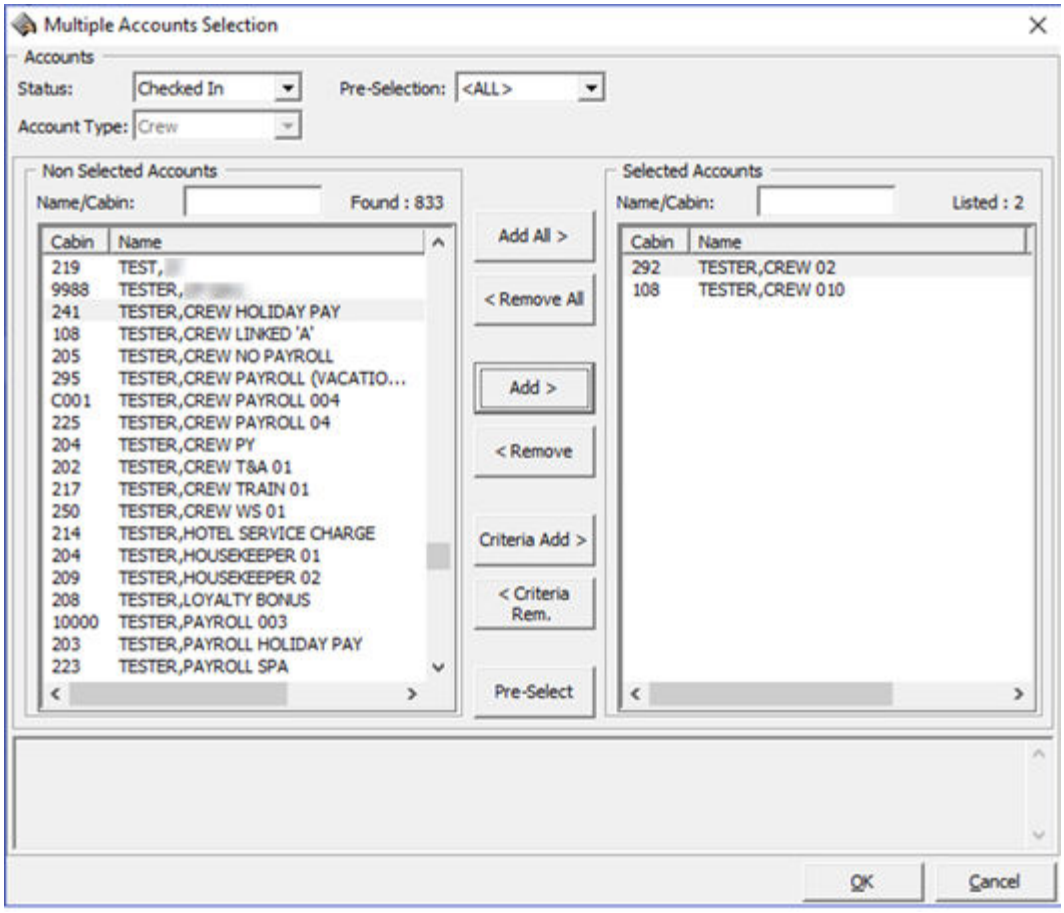
1. From the **Quick Functions** menu, select **Quick Posting**.
2. Enter the cabin number or select the **Account** using the drop-down list.
3. In the Department field, enter the **department code**, and enter the **value** to post.
4. In the Additional Information section, insert the **check number, Server#1**, if any, and select the **invoice number** to post. The system default invoice is one.
5. Click **Add** to add the account to the Posting List grid. Repeat the above steps until all checks are added to the Posting List.
6. Note and tally the current count and Current Totals with physical checks.
7. Click **Post** to confirm posting.

Quick Posting to Multiple Accounts

1. Under the Account field of the Quick Posting window, click **Advanced**.
2. In the **Multiple Accounts Selection** window, select the **Status** from the drop-down list.

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Figure 7-24 Quick Posting Multiple Account Selection



3. Select the **account name** from the Non Selected Accounts pane, and click **Add** to add the account singly or **Add All>** to add all accounts listed or use the **Criteria Add>**. See the *Selecting Account Using Criteria Option* section on how to select accounts using Criteria Add.
4. Accounts selected appear in the Selected Account window. Click **OK** to return to the Quick Posting window.
5. Navigate to the Department field, select the **department code**, and enter the **value** to post.
6. At the **Additional Information** section, insert the **Check number, Server#1**, if any, and select the **invoice number** to post to. System default Invoice is 1.
7. Click **Add** to add the account to the Posting List grid.
8. Click **Post** to complete the postings.

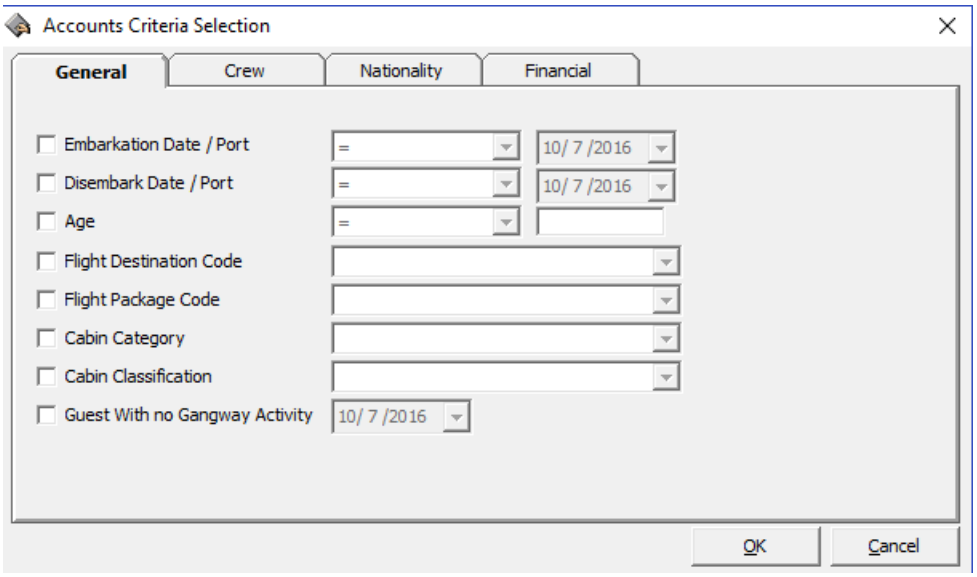
Selecting Account Using Criteria Option

The criteria options filters the accounts based on the criteria entered, for example by embarkation/disembarkation date, age, cabin category, and other.

1. At the Multiple Accounts Selection window, click **Criteria Add>**.
2. Select the **options** from the drop-down list in the **General** tab, then navigate to Crew tab.

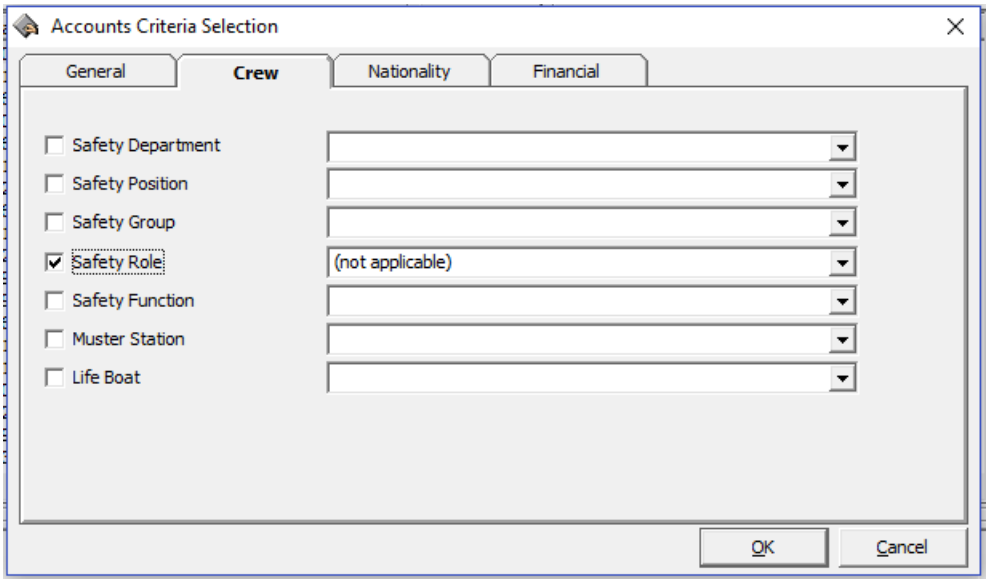
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Figure 7-25 Accounts Selection Criteria-General



3. In the **Crew** tab, select from the available **options** using the drop-down menu and continue to select from the remaining tabs, if required.
4. Click **OK** to return to the Multiple Account Selection window.

Figure 7-26 Accounts Selection Criteria-Crew

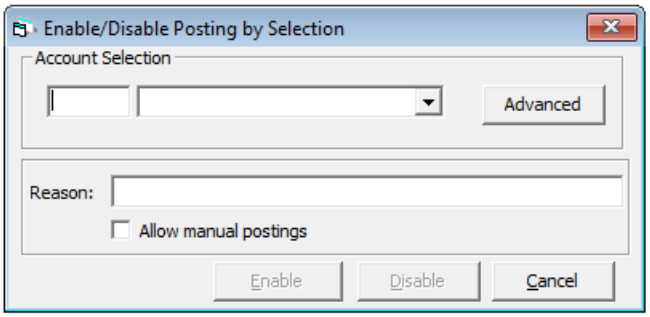


Quick Posting Status

The Quick Posting Status Enable/Disable function sets the account posting status by batch.

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Figure 7-27 Enable/Disable Posting Selection

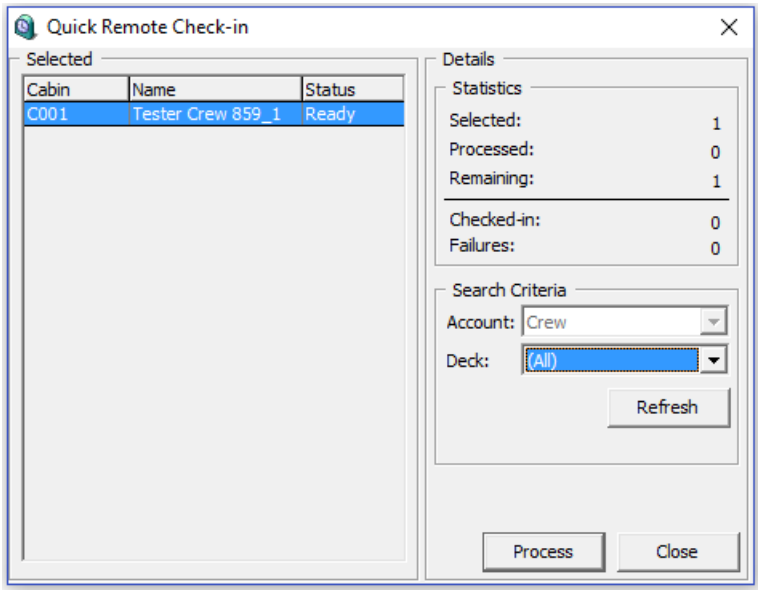


1. From the Quick Functions File menu, select **Quick Posting Status Enable/Disable** from the drop-down menu.
2. In the Enable/Disable Posting by Selection window, select the **amount** from the drop-down list or click **Advanced** to select multiple accounts.
3. Insert a reason in the **Reason** field.
4. Select the **Allow manual postings** checkbox if manual posting is allowed for Disabled accounts.
5. Select one of the options: **Enable** or **Disable the account.**

Quick Remote Check-In

The Quick Remote Check-In enables you to check-in the crew by Deck.

Figure 7-28 Quick Remote Check-In



1. From the Quick Functions options menu, select **Quick Remote Check-In** option.
2. Select the **Deck** from the drop-down list and click **Refresh**.

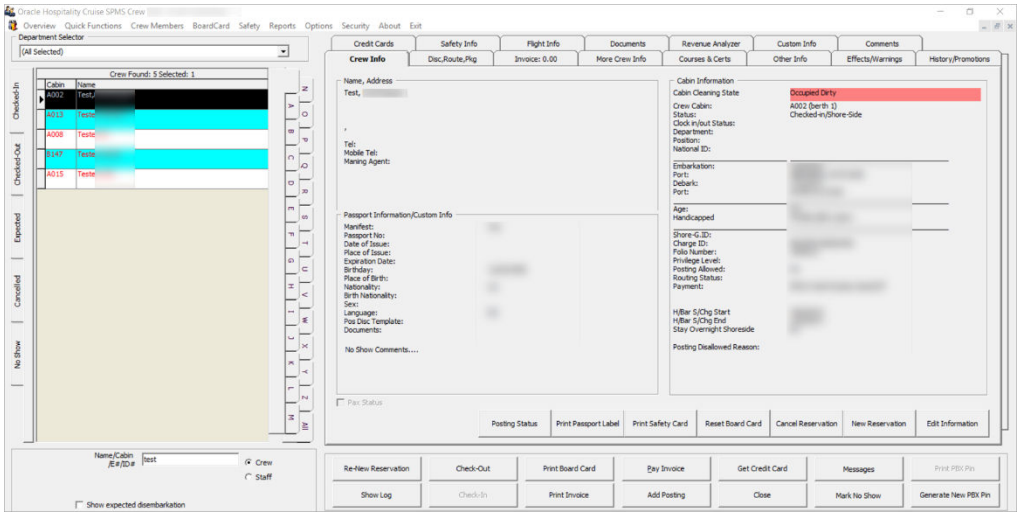
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3. At the Selected Crew section, cabin number and name of crews due to check in are listed, with the total selected account shown at the **Statistic** section.
4. Click **Process** and select **Yes** at the confirmation prompt to proceed.
5. The system updates the number of records processed and its status in the Statistic section. Click **Close** to return to the main window.

Crew Members Function

The content below describes the function for accessing the crew data such as Crew Information, travel documents, invoice, crew history, group account, and others. You can create, amend and cancel a reservation, post a charge and check out a crew account. These functions are accessed by using the **Crew Members** drop-down menu.

Figure 7-29 Crew Handling



Crew Handling

Search Panel

The Search Panel function is a reservation look up by status in a tab view — Check In, Check Out, Expected, Canceled and No Show from the Crew Handling window.

Search Using the Search Panel

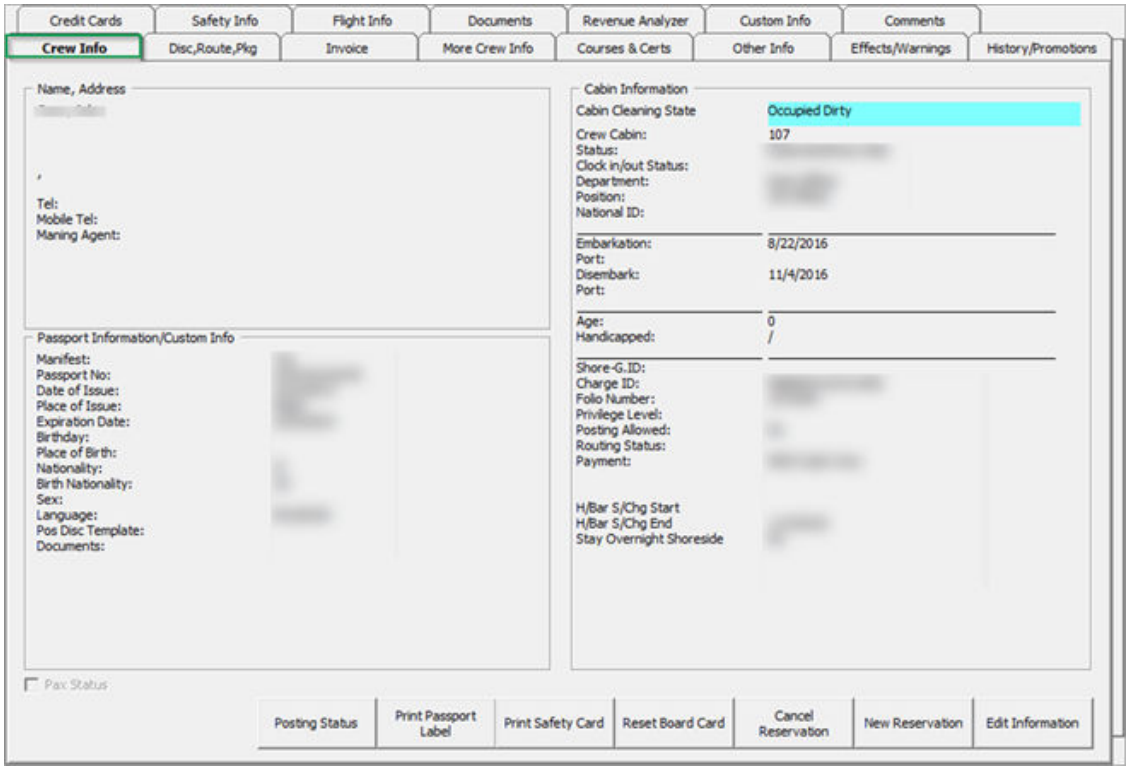
1. At the Search Panel, select the **Status** tab.
2. You can select an alphabet corresponding to the last name of the reservation or select **ALL** to list all reservations in alphabetical order.
3. You can further narrow down the search using either the crew name, document number, or cabin number and date.

Crew Info Tab

The Crew Info tab is the default tab after an account/reservation search. It provides a single view of crew's information such as name, address, passport details, cabin information, and others that enable you to drill down further into the reservation for more information.

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Figure 7-30 Crew Info Tab



New Reservation Function

The New Reservation function creates a new crew reservation. A reservation form is launched when you clicked the **New Reservation** button. Below are the definitions of the fields on the form.

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Figure 7-31 New Crew Information Window

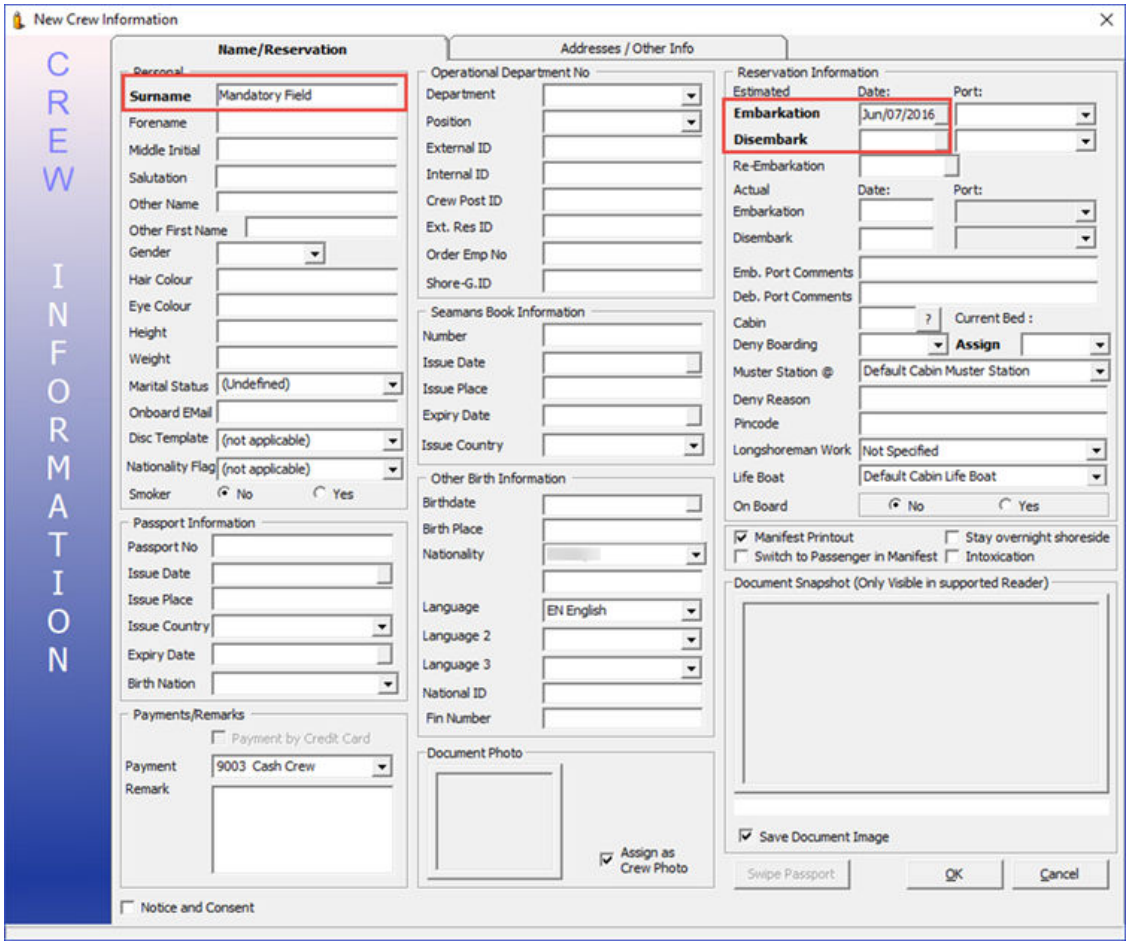


Table 7-4 Field Definition of Crew Information Tab (Name)

Field	Description
Name	
Surname	Last name of the crew.
Forename	First name of the crew.
Middle Initial	Middle name of the crew.
Salutation	Salutation of crew.
Other Name	Other Last Name in passport/ID.
Other First Name	Other First Name. in passport/ID.
Gender	Gender Identifier.
Marital Status	Marital Status.
Onboard Email	Email contact while on board.
Disc Template	Available discount templates.
Nationality Flag	Flag to determine if the crew nationality belongs to European Union (EU) or Non-European Union.
Smoker	Smoker Identifier.

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Table 7-5 Field Definition of Crew Information Tab (Passport Information)

Field	Description
Passport Information	
Passport No	Passport number of the crew.
Issue Date	Date travel document was issued.
Issue Place	Place travel document was issued.
Issue Country	Country travel document was issued.
Expiry Date	Expiry date of travel document.
Birth Nation	Original nationality of the crew if differ from Nationality field.

Table 7-6 Field Definition of Crew Information Tab (Operational Department No.)

Field	Description
Operational Department No.	
Department	Operational department assigned.
Position	Operational position assigned.
External ID	External System Crew ID.
Internal ID	Internal Crew ID.
Crew Post ID	Waiter ID number used in POS system.
Ext. Res ID	External System Reservation ID.
Order Emp ID	Employer number of crew incentive program.
Shore.G-ID	Unique Identifier for FMS. A user definable label.

Table 7-7 Field Definition of Crew Information Tab (Seamans Book Information)

Field	Description
Seaman's Book Information	
Number	Seaman Book number.
Issue Date	Date of issue of Seaman book.
Issue Place	Place of Issue of Seaman book.
Expiry Date	Expiry date of Seaman book.
Issue Country	Country Seaman book were issued.
Other Birth Information	
Birthdate	Birthdate of the crew.
Birth Place	Birthplace of the crew.
Nationality	Nationality of crew.
Language	Main language spoken.
Language2 / 3	Other spoken language.
National ID	Local identification document, for example, ID or Driving License.

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Table 7-8 Field Definition of Crew Information Tab (Reservation Information)

Field	Description
Reservation Information	
Estimated Embarkation/ Disembarkation Date	Embarkation/Disembarkation date.
Estimated Embarkation/ Disembarkation Port	Port of embarkation/ Disembarkation.
Re-Embarkation	Crew expected return date.
Actual Embarkation/ Disembarkation Date	Actual Embarkation/Disembarkation date.
Actual Embarkation/ Disembarkation Port	Port of embarkation/ Disembarkation.
Emb. Port Comments	Sign-on harbour comments.
Deb. Port Comments	Sign-off harbour comments.
Cabin	Cabin number assigned.
Deny Boarding	Deny boarding identifier.
Assign	Current Berth Assigned.
Muster Station	Muster Station assigned. Linked to Cabin number.
Deny Reason	Reason boarding is denied.
Pincode	Pin code setup for outgoing calls and access to Kiosk.
Longshoreman Work	Indicate crew to perform longshoreman work during next port.
Life Boat	Life Boat assigned to crew. Linked to Cabin number.

Table 7-9 Field Definition of Crew Information Tab (Other Parameter)

Field	Description
Other Parameter	
Manifest Printout	Indicates manifest has been printed.
Switch to Passenger in Manifest	Indicates reservation has been moved to Passenger manifest.
Stay overnight shoreside	Indicates that crew stays overnight at shore side.
Intoxication	Intoxication identifier.

Table 7-10 Field Definition of Crew Information Tab (Others)

Field	Description
Others	
Document Image Snapshot	Displays snapshot of scanned passport.
Photo	Displays saved crew photo.
Notice and Consent	Mandatory field. Indicates passenger accept and agrees to the Notice and Consent Terms.

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Figure 7-32 Crew Information Address/Other Info

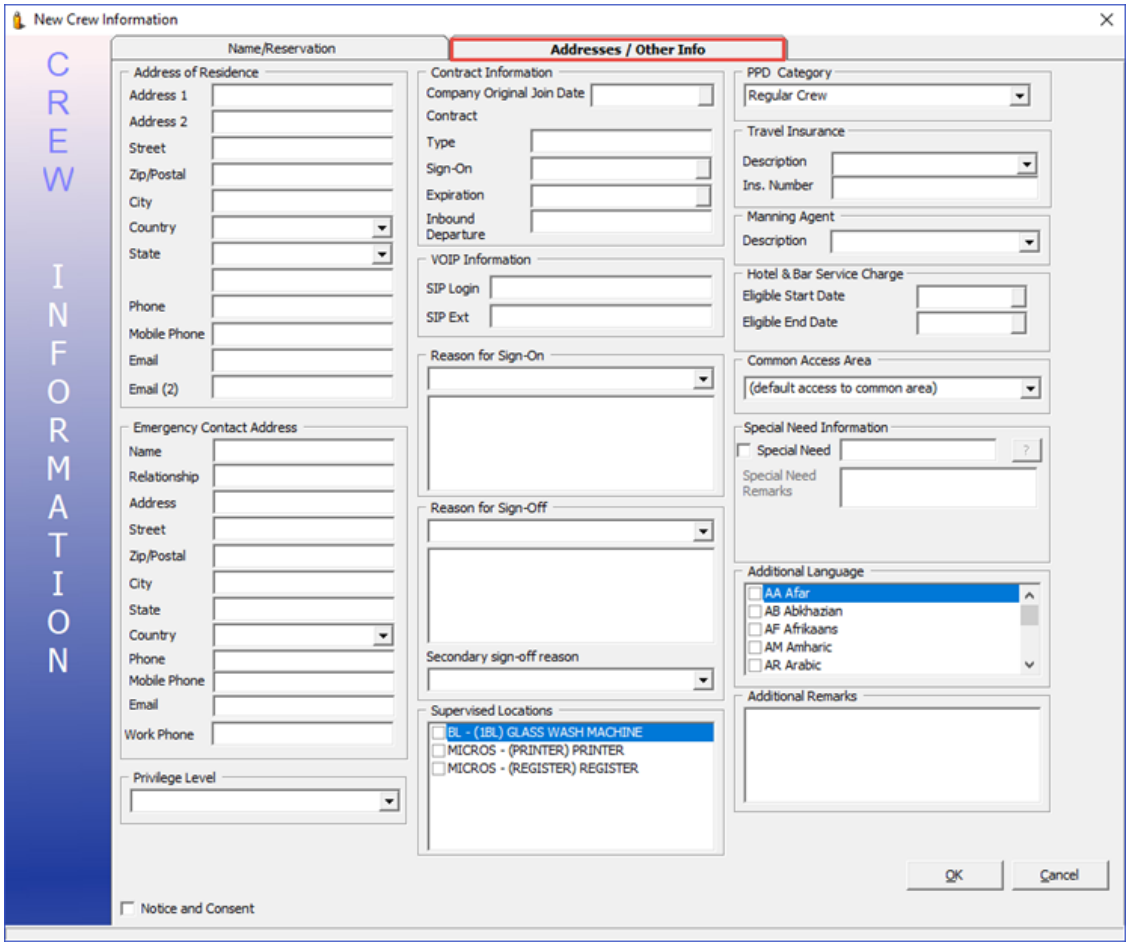


Table 7-11 Field Definition of Crew Information Address Tab (Address / Temporary Address)

Field	Description
Address / Temporary Address	
Address 1	Address 1.
Address 2	Address 2.
Street	Street name.
Zip/City	Zip code/ Name of city.
Country	Country.
State	State.
Phone	Phone number of guest.
Email 1	Email address of guest.
Email 2	2nd Email address of guest.

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Table 7-12 Field Definition of Crew Information Address Tab (Emergency Contact Address)

Field	Description
Emergency Contact Address	
Name	Name of Emergency contact person.
Relationship	Relationship of Emergency contact person and guest.
Address	Address.
Street	Street.
Zip/City	Zip code/ City.
State	State.
Country	Country of Residency.
Phone	Phone number of contact person.
Mobile Phone	Mobile number of contact person.
Email	Email address of contact person.
Work Phone	Business phone number of contact person.

Table 7-13 Field Definition of Crew Information Address Tab (Contract Information)

Field	Description
Contract Information	
Company Original Join Date	Crew join date for payroll contract use.
Contract Type	The type of contract the linked to crew member.
Sign On	Contract sign on date.
Expiration	Contract expiration date.
Inbound Departure	Track inbound departure date for Crew members.

Table 7-14 Field Definition of Crew Information Address Tab (VOIP Information)

Field	Description
VOIP Information	
SIP Login	VOIP login ID.
SIP Ext	VOIP extension on board.
Reason for Sign-On	Reason to sign on onboard.
Reason for Sign-On	Reason to sign on off board.
Supervised Locations	Locations that are tagged as 'crew supervision assignment'.
PPD Category	Add PPD category assignment to a crew or guest.
Travel Insurance	Travel insurance type.
Manning Agent	Travel insurance number.

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Table 7-15 Field Definition of Crew Information Address Tab (Hotel & Bar Service Charge)

Field	Description
Hotel & Bar Service Charge	
Eligible Start/End Date	Service charge eligible start / end date.
Common Access Area	Common areas of accessible for the onboard card.
Handicapped Information	Special need information.
Additional Language	Additional language other than default language.
Notice and Consent	Mandatory field. Indicates passenger accept and agrees to the Notice and Consent Terms.

Creating New Reservation

1. At the Crew Handling window, click the **New Reservation** button to open a Crew Information form.
2. Enter all relevant information, particularly the mandatory fields and read the Notice and Consent clause to the crew before selecting the **checkbox**. You are not allowed to proceed if the checkbox remains deselected when you click the **OK** button, and the system prompts a warning message.
3. Note that the ship operator sets the mandatory fields. Refer to your company standard operating procedure.
4. Click **OK** to save the form.
5. Saved information is updated and shown under the **Crew Info tab** and categorizes the crew as Expected Arrival.

Editing a Reservation

1. Search the reservation using the **Search Panel**, then click **Edit Information** under the **Crew Info tab** to open the existing Reservation Form.
2. Edit all relevant information, and click **OK** to save the changes.

Cancelling a Reservation

1. Select the **Expected crew** from the Search Panel, and click **Cancel Reservation** under the Crew Info tab. You can only cancel an Expected crew reservation.
2. Selecting **Yes** at the Cancel Reservation prompt places the booking under the Cancelled tab.

Posting Status

The Posting Status function enable/disable an account from accepting postings coming from food and beverage or retail outlets, and provides a better management of the crew account so that it does not exceed the credit limit allowed.

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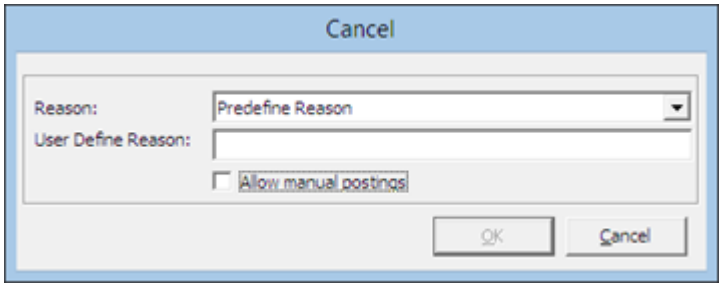
Enabling a Posting

1. Search the crew account from the Search Panel and click **Posting Status** at **Crew Info** tab.
2. The system prompts for a response to enable the account. Selecting **Yes** at the prompt resets the Posting status to allowed, or **No** to remain as unchanged.

Disabling a Posting

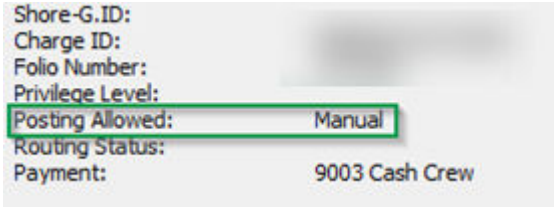
1. Repeat step 1 of the above.
2. Enter the **reason to disable** the posting when prompted, either by selecting a predefined reason from the drop-down list or by entering them manually.

Figure 7-33 Predefined Reason to Disable Posting



3. If **Allow manual postings** is selected, this only disables postings through the interfaces. Manual posting within the **Crew Handling** window is still permissible.
4. Click **OK** to set the posting status for the account to a **No** or **Manual**.

Figure 7-34 Manual Posting Allowed Status



Print Passport Label

The Print Passport Label prints the crew's information on a label, which are then pasted into the crew's passport for ease of identification. A label must be set up in *Administration, Report Printing, Crew – General* group.

Print Safety Card

The Print Safety Card prints the **Blue Card** of the crew as an identification of the manning station they should report to during an emergency. Information printed on the card derives from the Safety Info tab.

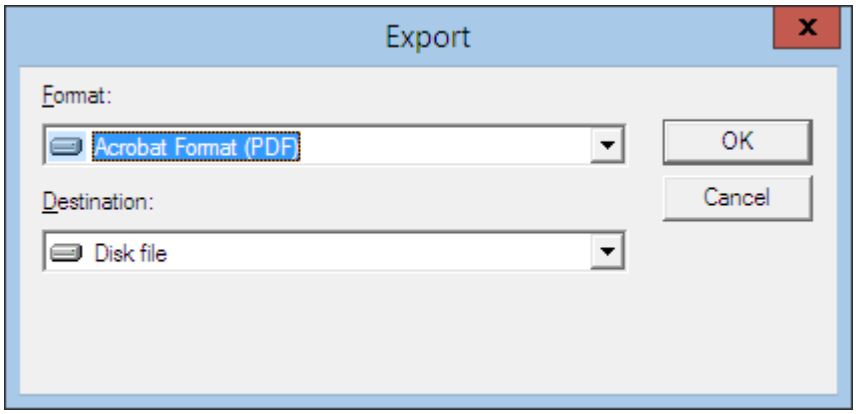
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Show Log

The system logs a chronological record of activities such as crew movements, financial transactions, and system events. To enable the reconstruction and examination of the sequence of events and/or changes made, you can view such information in the Show Log function.

1. Retrieve the reservation from the Search Panel.
2. Click the **Show Log** in **Crew Info** tab.
3. A list of events appears on the window, ordered by date/time.
4. Click the **Print** button to send a copy of the log to the printer.
5. Click **Export** to export the log into a supported file format.

Figure 7-35 File Export Prompt



Disc Route Pkg Tab

The Discount, Route, Package function routes the charges within the same invoice or to other crew prior to crew check-in if set up. The functions enable allowable discounts in SPMS and Point-of-Sale (POS). It also gives an overview of the Package Plan entitlement.

Routing

The Routing function automates the transfer of charges within the crew account or to multiple accounts, allowing you to consolidate charges into one invoice/account. The use of this function is to facilitate the invoicing process at group reservations level or party/family traveling together. Depending on the requirements, the routing can be set up using one of these options: **Pay for** or **Pay by**.

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Figure 7-36 Routing Tab

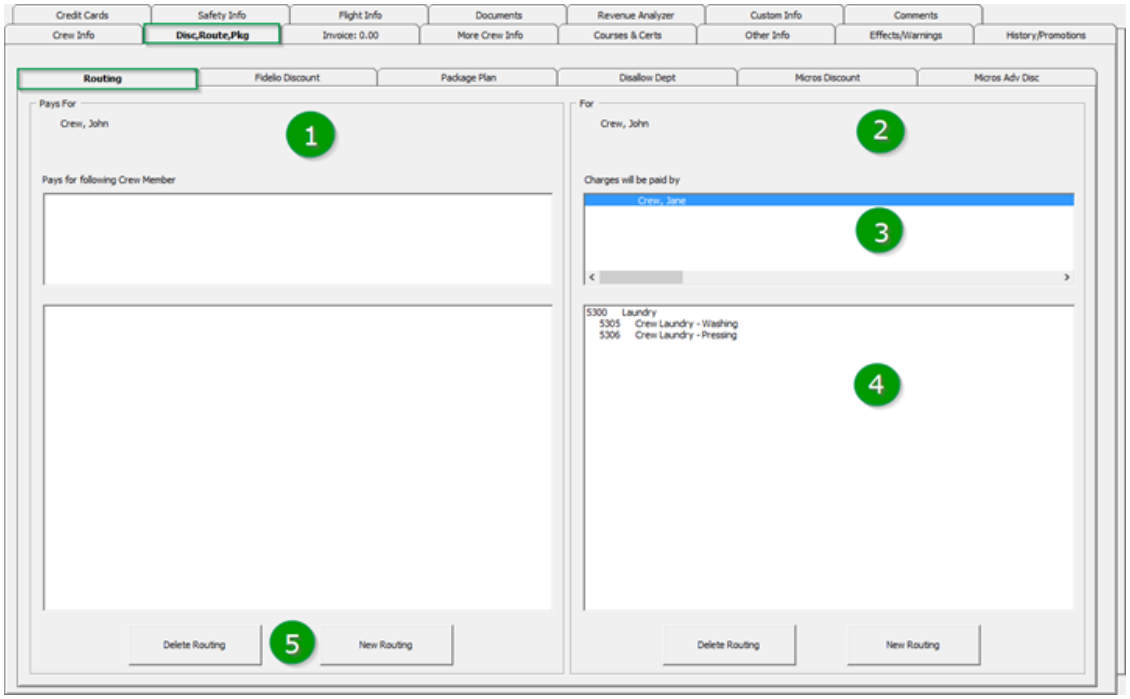


Table 7-16 Routing Tab Definition

Section	Description
1	Pays for - This section defines the payer account and whom the account is paying.
2	For - This section defines where the assigned financial department is routed.
3	Cabin number and name of crew payer is responsible.
4	Financial Department code assigned.
5	Button to set up or remove routing instructions.

Before moving/routing the charges, be sure to first check the current routing arrangements to avoid duplication of routing, which may result on charges not being re-directed as planned.

Paying for another Party

Using the following setup steps, you can route a charge when crew A pays for crew B.

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Figure 7-37 New Routing — 'Will Pay For'

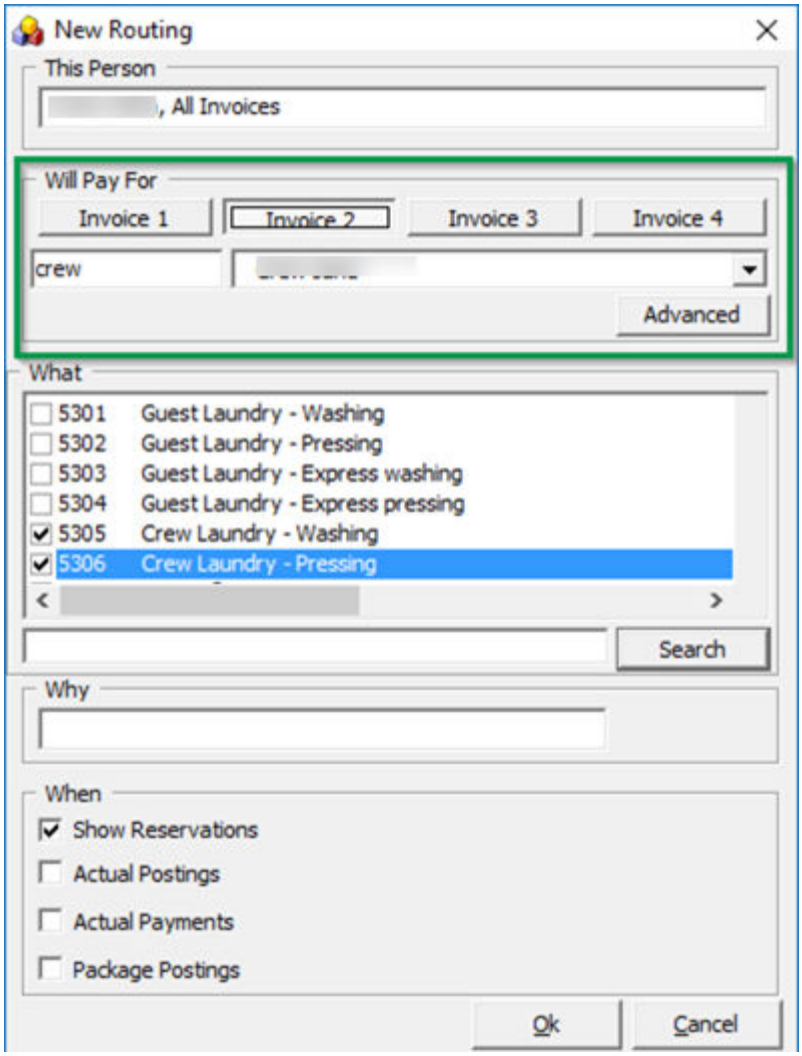


Table 7-17 Definition of Routing Options

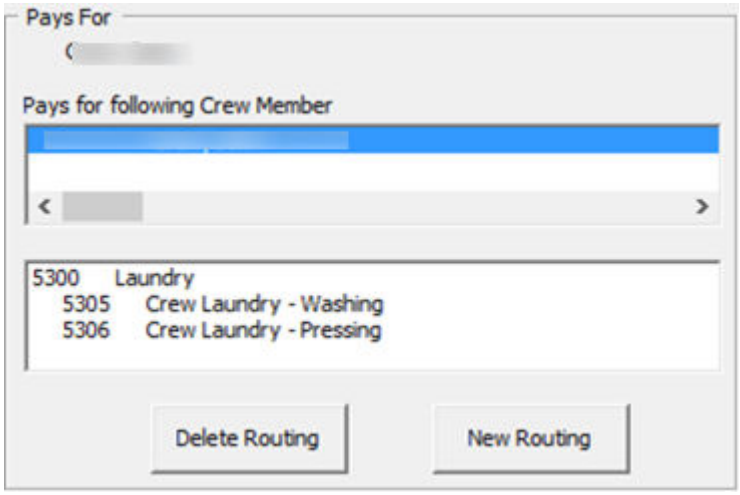
Field	Description
Show Reservations	Include expected to embark and reserve bookings. Only display checked in bookings if it is deselected.
Actual Postings	Where the Actual postings are routed.
Actual Payments	Where the Actual payments are routed.
Package Postings	Only route package postings.

1. Search the crew account and navigate to the Disc, Route, Pkg, Routing tab.
2. Click **New Routing** under the Pays For section to open the routing dialog box.
3. Select the **Invoice number** where the charges are routed.
4. For charges within the same account, leave the cabin number and crew name as it is.

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5. In the event where crew is paying for another account, change the **cabin number** and select the **respective guests**.
6. Select the **Financial Department** group or **codes** to be routed and enter the routing reason.
7. Select the options where applicable and click **OK** to save.
8. Once saved, the selected assignment is added to **Pays for** in the Routing tab.

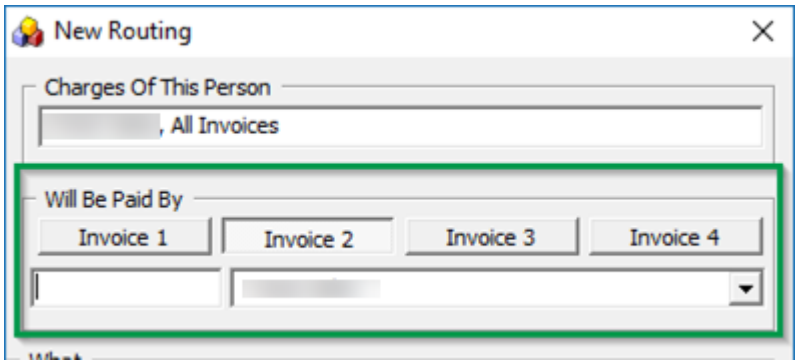
Figure 7-38 Routing Pays for Window



Paid by Another Party

1. At the Disc, Route, Pkg, Routing tab, click **New Routing** under the 'For section' to open the routing dialog box.

Figure 7-39 New Routing To — 'Will Be Paid By'



2. Repeat steps 3 to 8 of Paying for another party.

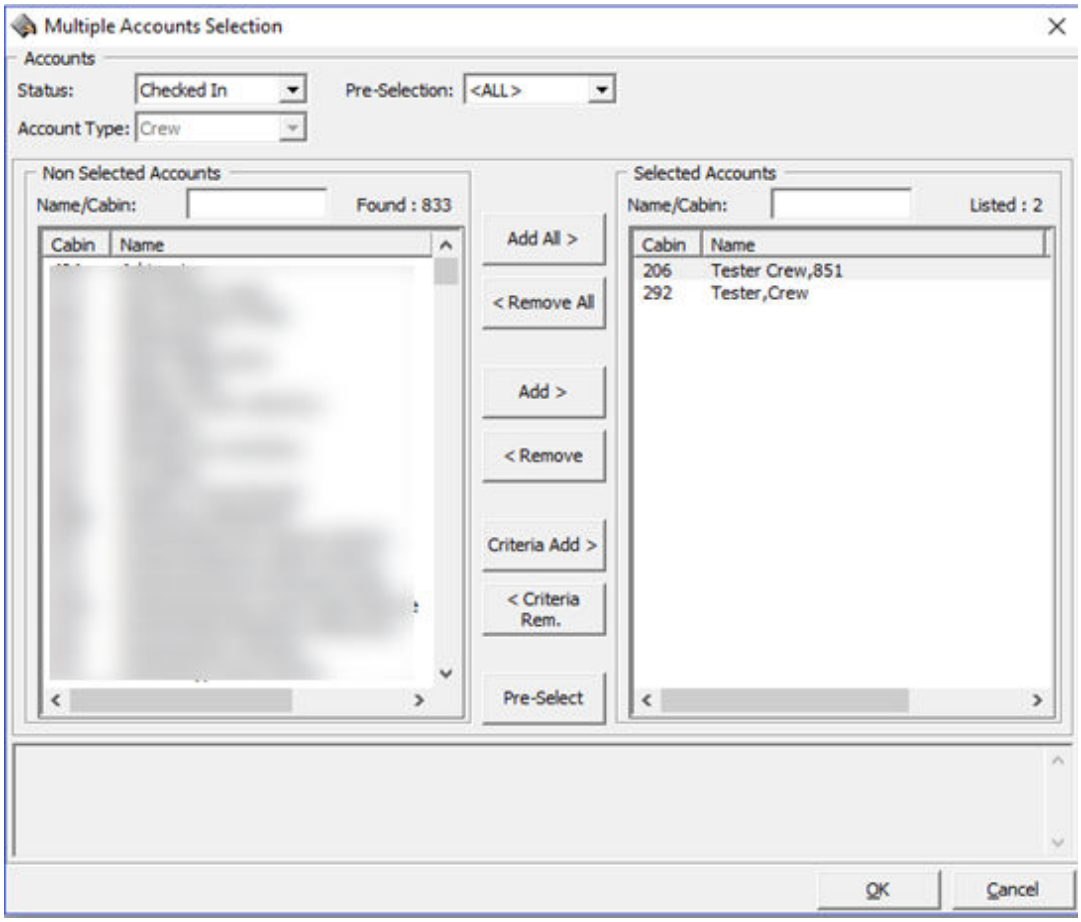
Advanced Routing

Below are the steps to set up routing for multiple guests, for example, group of crew account of parties travelling together.

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1. At the Disc, Route, Pkg, Routing tab, navigate to **Pays For** and click **New Routing** to open the routing dialog box.
2. At the new Routing window, click the **Advanced** button located just below the Invoice drop-down list to open the Multiple Accounts Selection window.
3. Accounts listed in the Non Selected Accounts section are based on default selection of the **Status** and **Account Type**. You can change these criteria using the drop-down list.

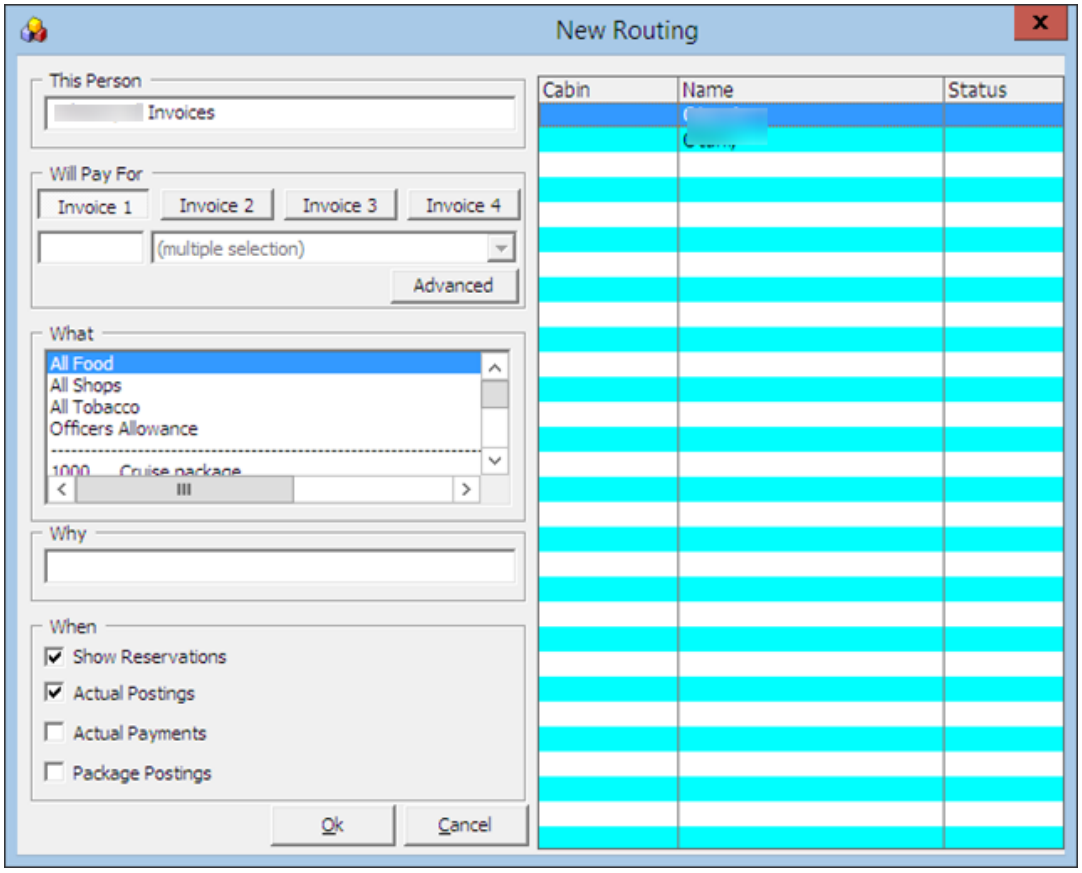
Figure 7-40 Routing Multiple Account Selection Window



4. To select all crew, click **Add All>** or individually select the crew, then click **Add>** to move the selection to the **Selected Accounts** pane.
5. Click **OK** to confirm the accounts selection which opens the **New Routing** window with the selected crew account listed.

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Figure 7-41 Routing Multiple Account Instructions



6. In the New Routing window, select the **Financial Department, Reason** and select the **checkbox** for the routing to occurs, then click **OK** to initiate the account routing.
7. During the assignment process, the status of the crew account changes to **OK**, followed by **Done**, and the New Routing window closes automatically once the process completes.

Deleting Existing Routing

To remove routing setup in the crew account,

1. In the Disc, Route, Pkg, Routing tab, select either to delete the **sub-financial department code** from the individual assignment, or select the **Main Financial Department** to delete all department codes, then click **Delete Routing**.
2. The system prompts for confirmation to delete the assignment. Click **Yes** to confirm the deletion or **No** to return to the Routing window.

SPMS Discount

The SPMS Discount function allows you to assign eligible discount either by percentage or value to a crew account.

Assigning a Discount

1. In the Disc, Route, Pkg, SPMS Discount tab, click **New Discount** to open the discount dialog box.

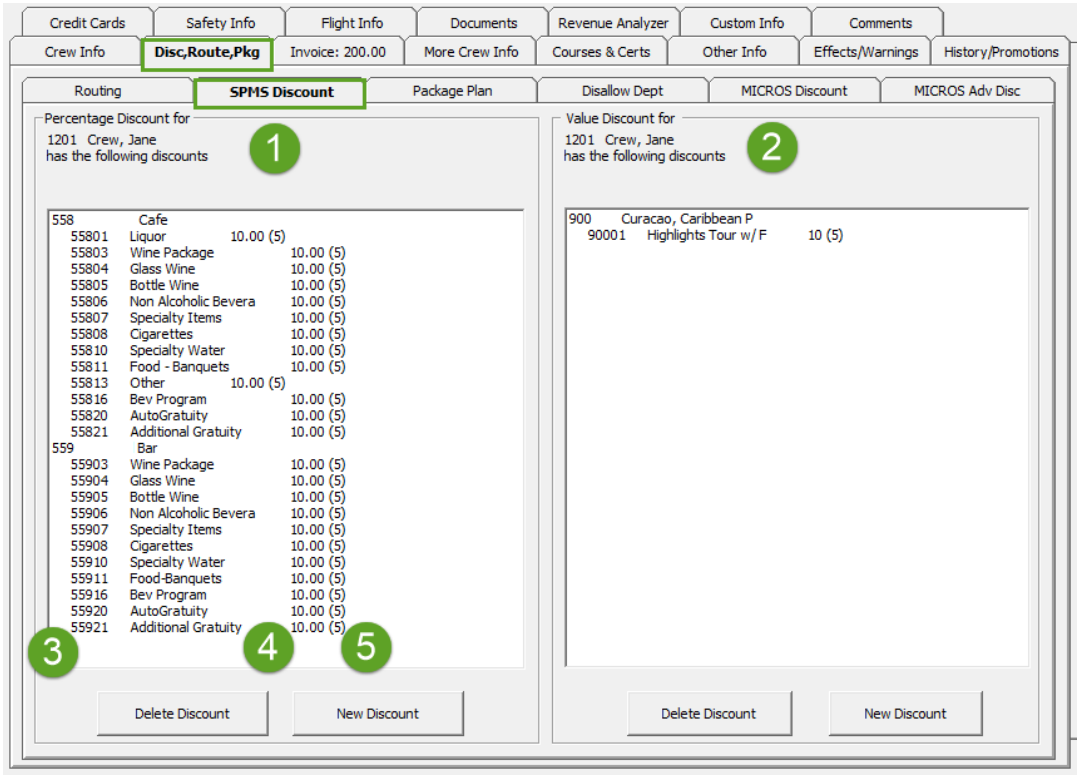
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2. Insert the **Percentage** and the number of times the discount is given in the Apply Count field. For example, enter one to specify a one-time discount for every selected department code, or blank for unlimited discounts for every selected department.
3. Select the **Posting Department** entitled to discount, either by selecting department group or individually; for example, All Food/Beverage or Room Service Food only.
4. You can also use the **Discount Template** by selecting the **checkbox** and selecting a template from the drop-down list if they are pre-configured. See chapter *Administration* for setup procedures.
5. Select whether the discount is applicable to **Actual** or **Future Postings**, and click **OK** to save.

> **Warning**
>
> Once a discount is applied to an actual posting, it *cannot* be reversed. If the discount has a count indicator, the system then post the discount until it reaches the count indicated and no discount will be accorded thereafter.

6. The assigned discounts is saved in SPMS Discount tab. Similarly, these are added when **Future Postings** is selected in **Criteria Discount.**

Figure 7-42 Disc, Route, Pkg — Discount Tab



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Table 7-18 Financial Department Codes

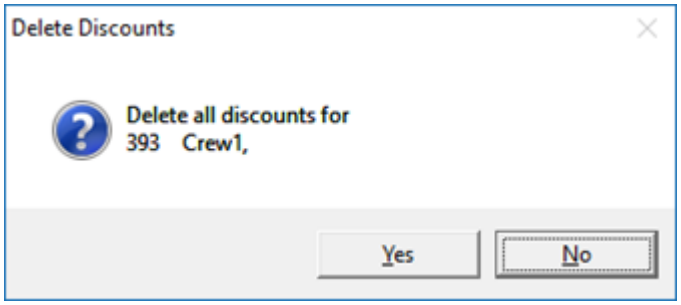
No.	Description
1	Financial Department codes entitled to Percentage discount.
2	Financial Department codes entitled to Value discount.
3	Financial Department codes and description.
4	Discount value (percentage or value).
5	No of count assigned to each financial code. 0 = unlimited.

7. If an **Actual Posting** is selected, the system post an adjustment (reverse) against the original posting and sets the adjusted posting to **No Print** automatically. It then reposts the correct value with the discount is indicated.

Deleting a Discount

1. In the Disc, Route, Pkg, Discount tab of the account.
2. If **Delete Discount** is clicked without first selecting a Financial code, this process deletes all assignments from the respective window.

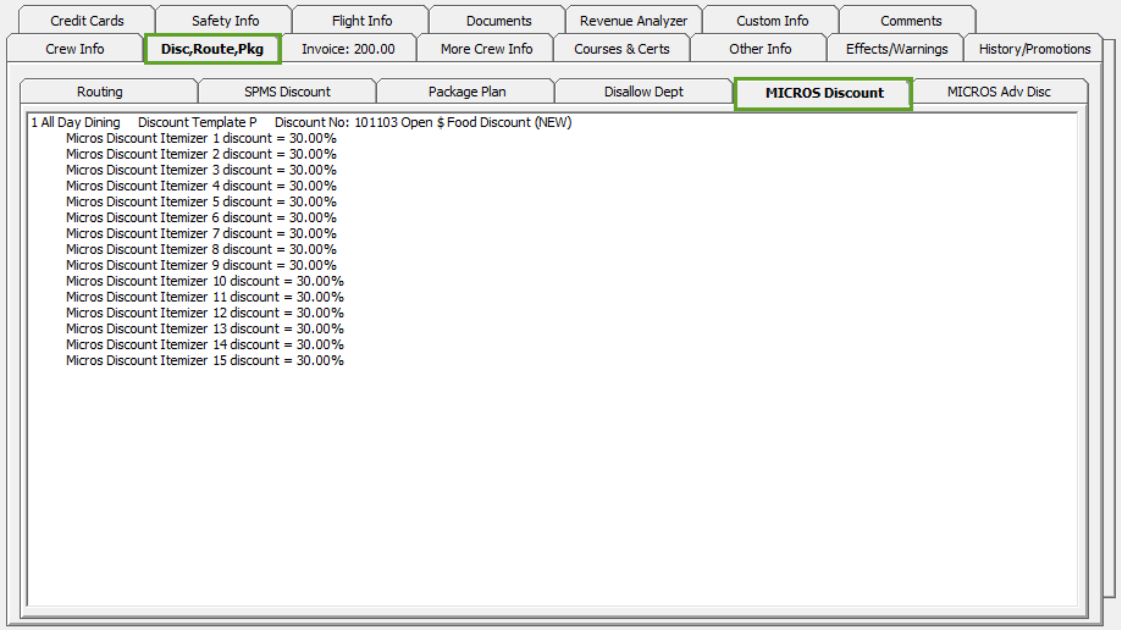
Figure 7-43 Delete Discount Prompt



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MICROS Discount

Figure 7-44 Disc, Route, Pkg — MICROS Discount



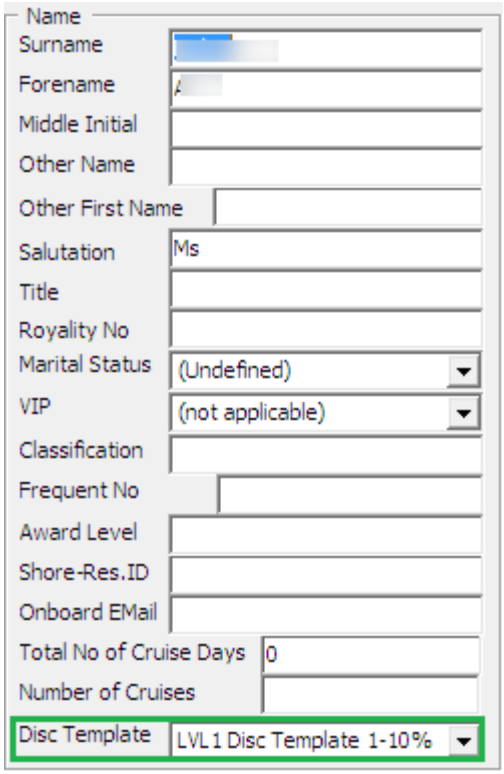
The MICROS Discount tab displays discounts accorded to crew using **POS Discount Itemizer** level. These discounts appear when crew has discount level assigned in the Crew Info, Edit Information, Discount Template field.

Assigning a POS Discount Level

1. In the Crew Info tab of the account, click **Edit Information** to open the Edit Crew Information window.
2. In the **Name section**, select the discount template from the drop-down list, then click **OK** to save.

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Figure 7-45 POS Discount Level Assignment



3. The assigned POS Discount template appears in the Passport/Custom Information section.
4. To view the eligible POS Discounts by Itemizer level, go to the Disc, Route, Pkg, MICROS Discount tab.

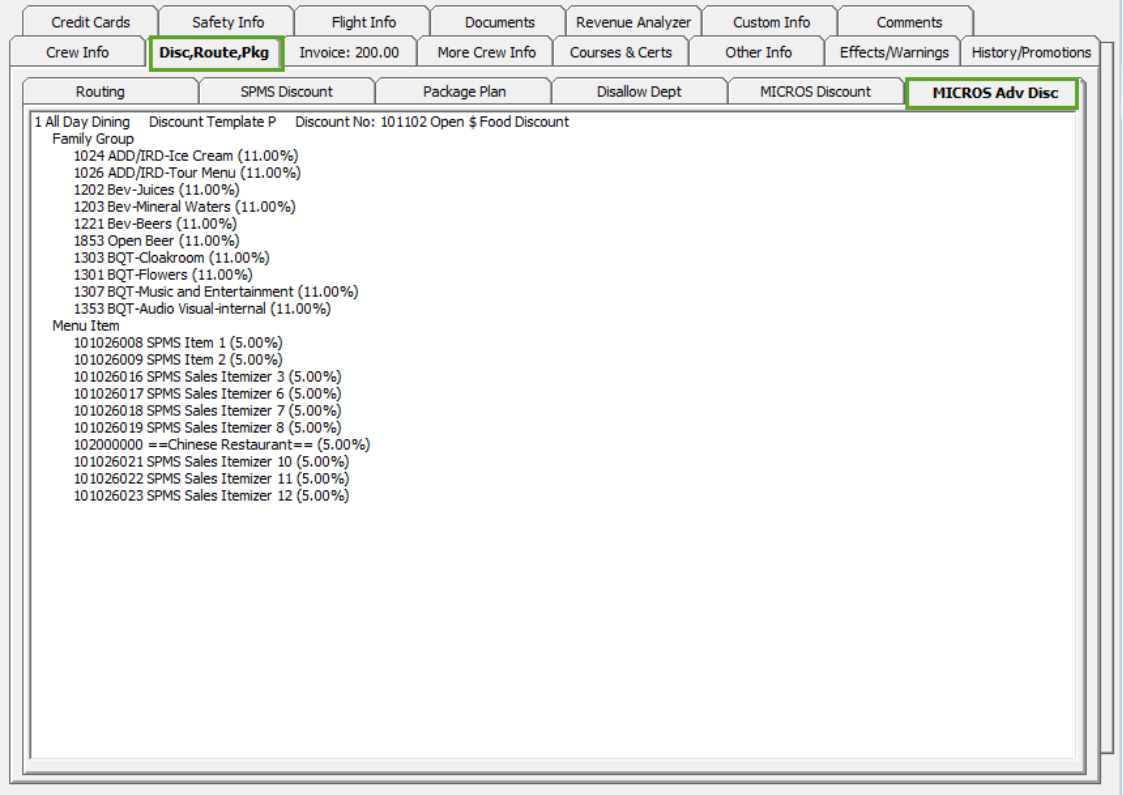
See also the *Administration* chapter, POS Discount section on how to configure the Discount Itemizer.

MICROS Advance Discount

The MICROS Advance Discounts works similarly to the MICROS Discount, with the exception that the discounts are applied to the POS Major Group, Family Group, and Menu Item level instead of the Itemizer Level.

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Figure 7-46 Disc, Route, Pkg — MICROS Advance Discount



See also the *Administration, POS Discount* section on how to configure the Advance MICROS Discount.

Disallow Department

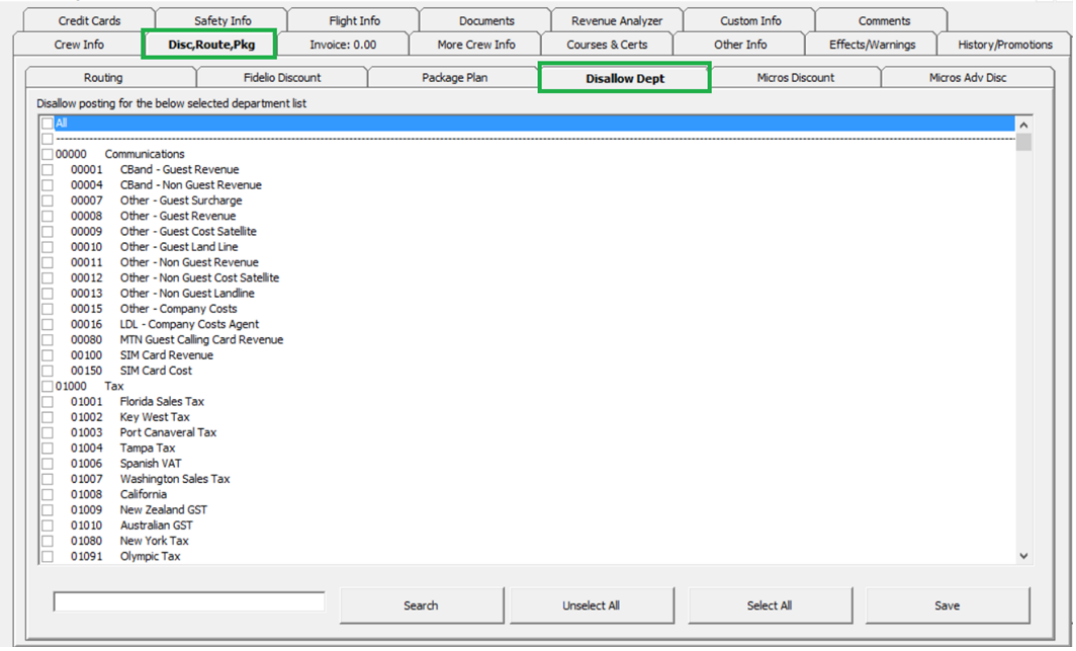
The Disallow Department function manages posting from being posted from restricted outlets to the crew account, for example, Casino Bar, or all tobacco and others.

Setting up a Disallow Department

1. In the Disc, Route, Pkg, Disallow Posting tab, select the Financial Department codes to disallow, either by Group or individual department code from the list and then click **Save**.

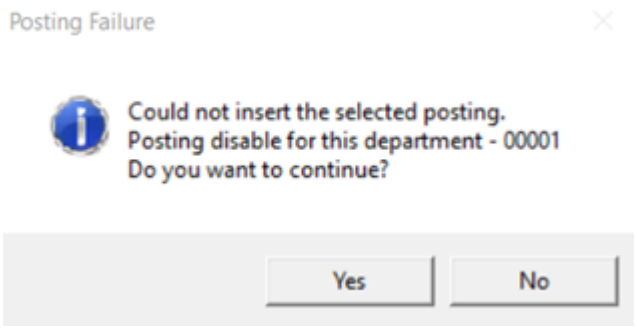
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Figure 7-47 Disallow Department Tab



2. When a posting is for a disallowed department, a Posting Failure prompt appears, informing you that the posting is not allowed as depicted in below figure.

Figure 7-48 Disallow Department Posting Failure Prompt



3. Click **Yes** to exit without posting and **No** to return to the Add posting window.

Package Plan

Package Plan

The Package Plan function enables you to customize a cruise package that suits the crew requirements, combining different food and beverage outlets, excursions, or activities using the flexi package plan option.

Assigning / Purchasing a Package Plan

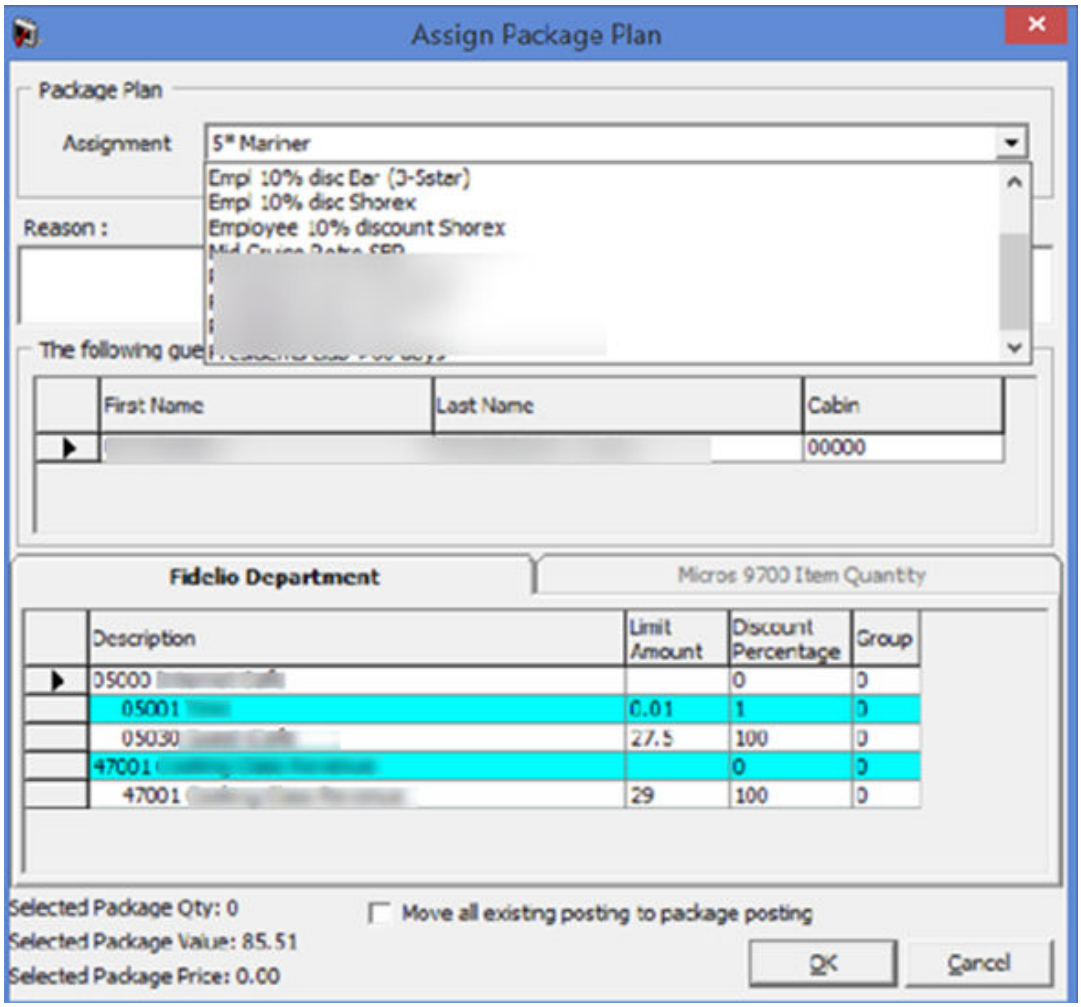
Assigning the correct package plan to the crew account enables you to post transactions accurately throughout the cruise and assign packages within the crew account.

1. At the Disc, Route, Pkg tab of the crew, select the **Package Plan** tab.

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2. Select one of these options:
   - **Assign package Plan:** This assigns an available package that does not have a pre-set Purchase price.
   - **Purchase Package Plan:** This purchases a package setup with the purchase price.
3. To assign/purchase a package, select the available package from the drop-down list and enter the **Reason**.

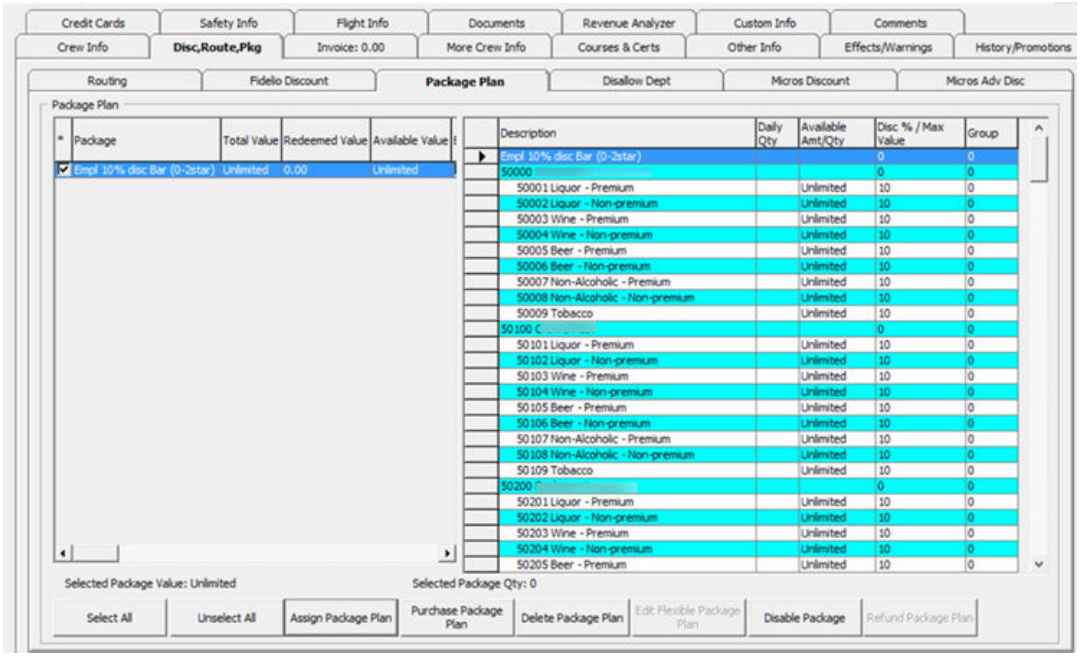
Figure 7-49 Package Plan Assignment Window



4. Select only the **Move all existing posting to package posting** checkbox to move the existing postings to a package plan. For example, a crew purchases the package part way through the cruise, and past postings that meet the package elements are considered as a package plan.
5. Click **OK** to save. Information pertaining to the package are available in the **Package Plan** tab and the status is **Active**.

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Figure 7-50 Package Plan Assigned / Purchased

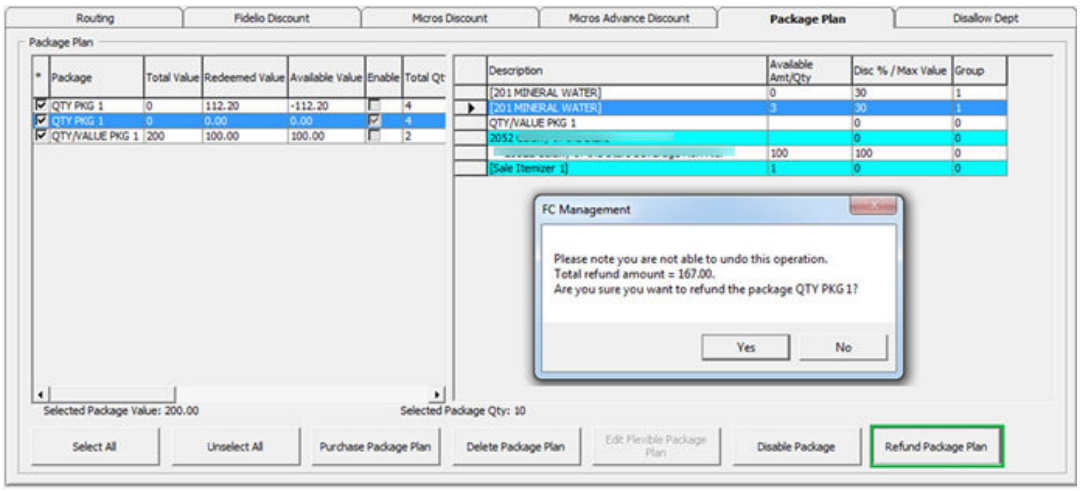


Refunding a Package Plan

The unutilized package plan is refundable to the crew at the end of the cruise. Below are the steps to refund a Value based package, Quantity based and Mix package.

1. In the Disc, Route, Pkg tab of the crew account, select the **Package Plan** tab.
2. Select **Refund Package Plan**.

Figure 7-51 Package Plan Refund Option



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

3. Once the package plan is refunded, the system disables the package and displays the remaining value/quantity for reference only.
4. If the postings are more than the package price, the system prompts that a refund is not allowed.

Routing a Package Plan Posting

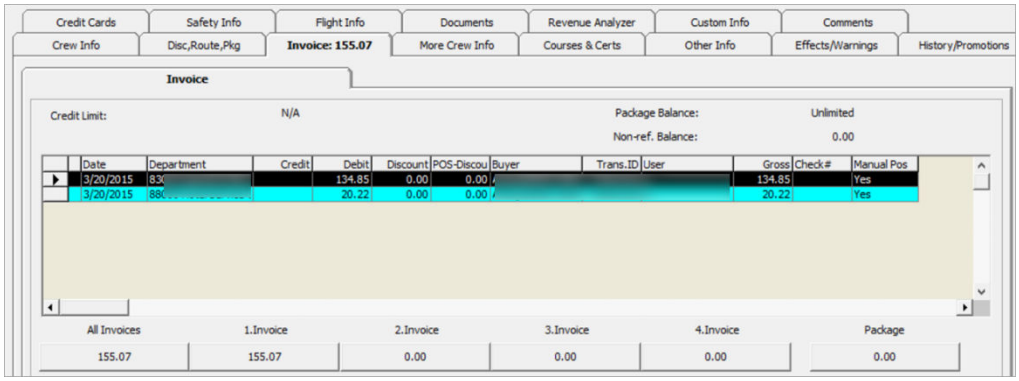
Routing a package plan posting depends on two parameters: Do not allow post package to both buyer and payer and Package Plan Before Routing.

When both payer and buyer haves a package, all postings go to the payer. Once the payer package is fully utilized, subsequent postings are posted the payer account as normal postings.

Auto Balancing a Package Plan

You can set up Auto Package Plan balancing using **Enable Package Auto Balance as 1** parameter, which allow the system to automatically balances the package invoice/account after each transaction and reduces the total package value or quantity at the same time.

Figure 7-52 Package Plan Invoice Window



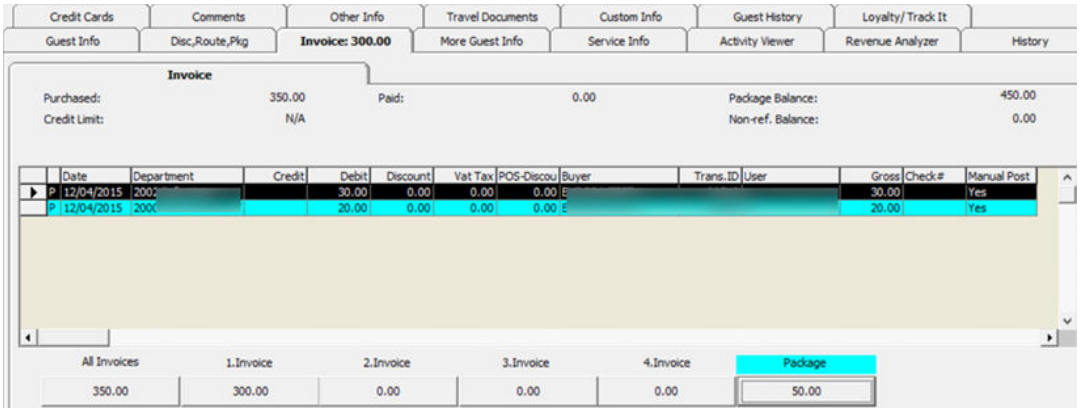
If the parameter above is set to zero, manual balancing of the package invoice/account is required using the **Pay Invoice** function.

Manually Balancing a Package Invoice

1. Select the **crew account** from the Search panel, navigate to the **Invoice** tab, and click the **amount** under the **Package Invoice**.

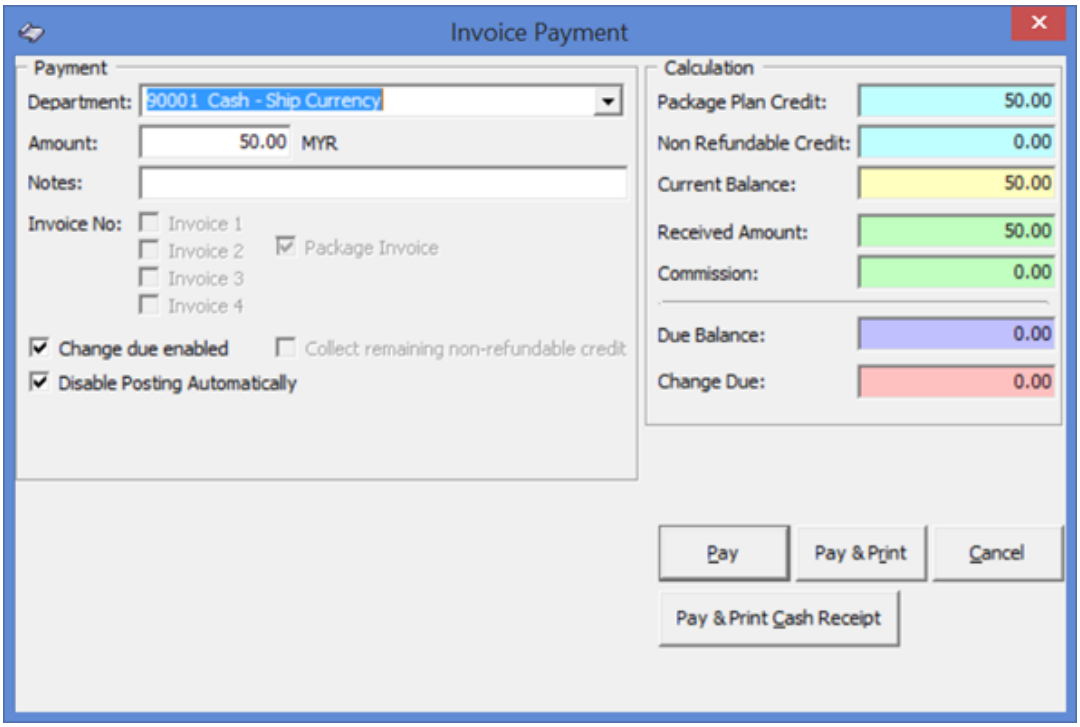
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Figure 7-53 Settling a Package Plan



2. Select the **Payment method** and verify the amount to settle when prompted.
3. Select **Pay** or **Pay & Print** to pay and print the invoice and reduce the Package Invoice at the same time.

Figure 7-54 Paying an Invoice



Invoice Tab

The Posting Handling function provides you with four invoices per crew and it enables you to post a manual charge to an account, route postings, and post various payment types.

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Figure 7-55 Add Posting Window

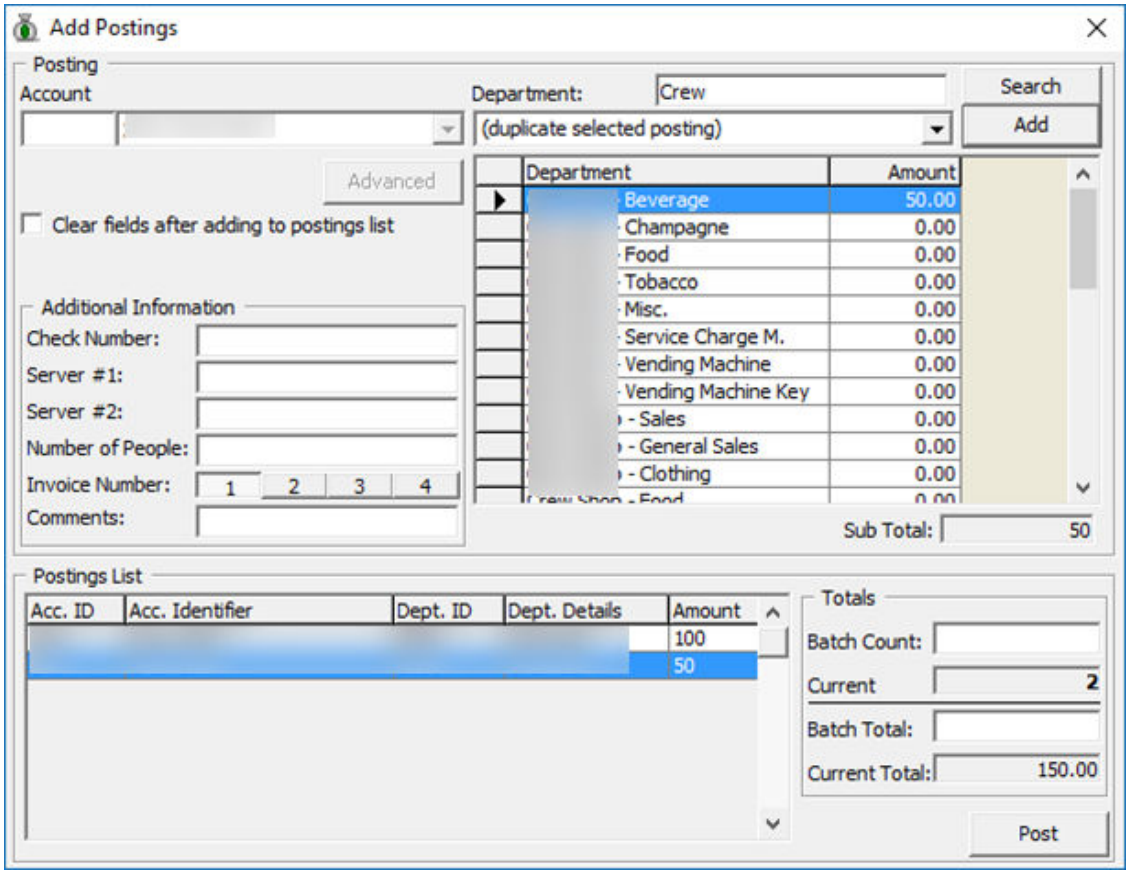


Table 7-19 Field Definition of Add Posting Window

Field	Description
Account	Crew Account by Cabin No. and Name.
Clear fields after adding to posting list	Clear all information in Additional Information section after adding posting.
Check Number	Check Number from POS System or any manual posting reference.
Server #1:	Server name appeared on POS check.
Server #2:	Server name appeared on POS check.
Number of People	No. of crew that dined. Information from POS System.
Invoice Number	Invoice number to post to
Comments	Additional comments.
Posting List	List of postings added.
Batch Count	Confirmation of number of postings added in Quick Posting function.
Current Count	System count on Postings List.
Batch Total	Confirmation of total value posted in Quick Posting function.

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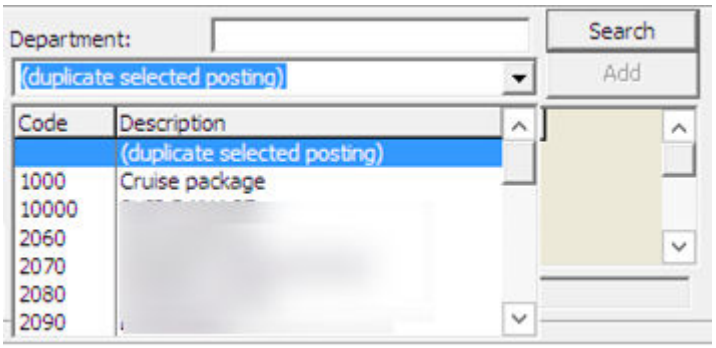
Table 7-19 (Cont.) Field Definition of Add Posting Window

Field	Description
Current Total	Accumulated value to post.

Adding a Posting

1. Select the **crew account** from the Search panel and click **Add Posting** in the Crew Handling window.
2. In the Add Postings form, select the **Financial Department** from the drop-down list or use the **Search** option for a department code.

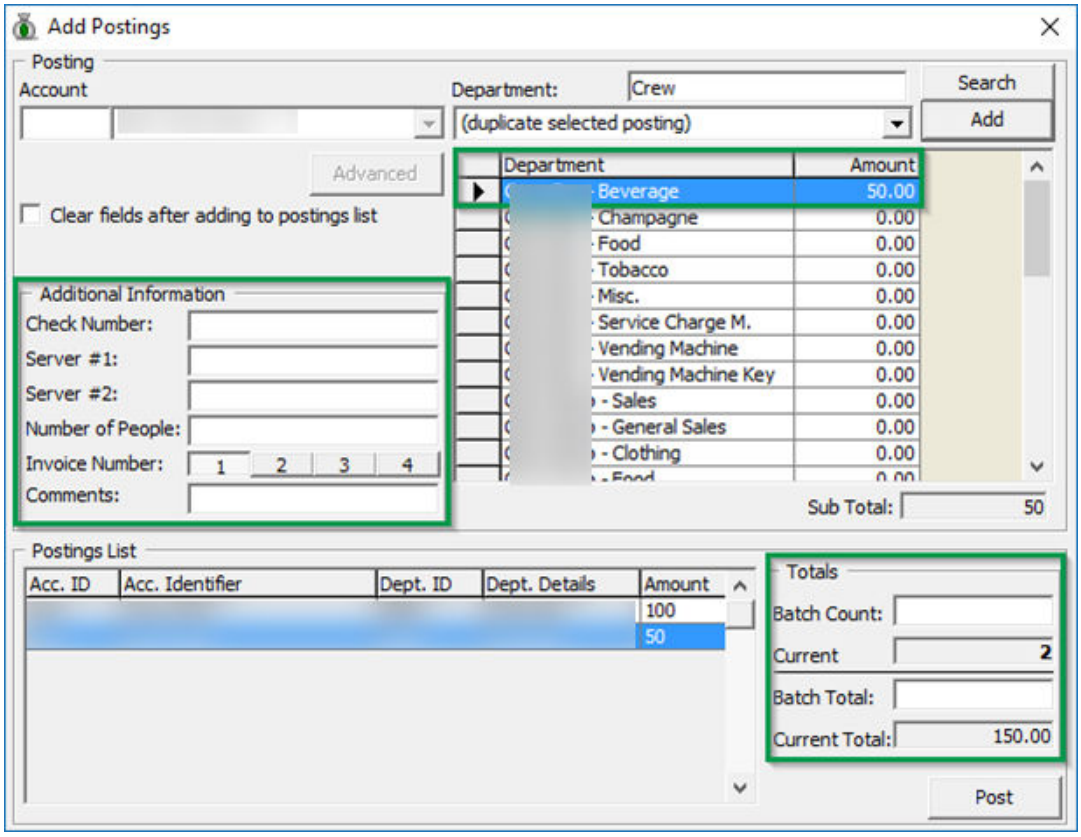
Figure 7-56 Add Posting Financial Department Selection



3. Insert the **Value, Check Number**, select the **Invoice number** to post, and click **Add**. This transfers the posting to the **Postings List**, enabling you to post more than one charge.

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Figure 7-57 Adding a Charge



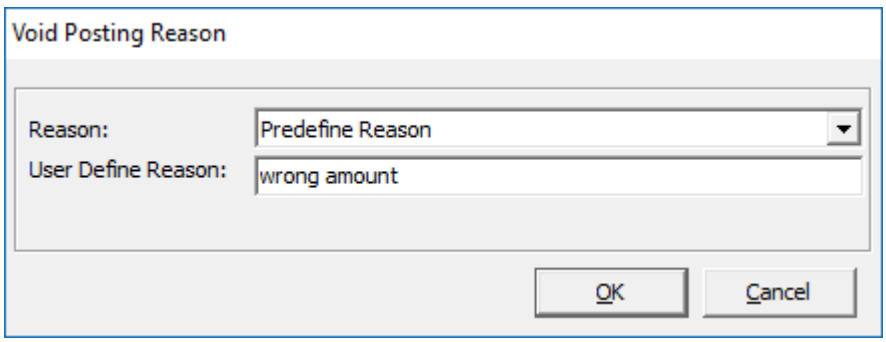
4. Item count increases automatically when the posting is more than one.
5. Click **Post** to finalize the postings and the posted transaction appears in the Invoice tab among earlier posted charges.

Voiding a Posting

1. In the Invoice tab of the crew account, select the **transaction** to void and click the **Void** button.
2. The system prompts for confirmation on the charge to void. Click **Yes** to confirm the void and **No** to return to the previous window.

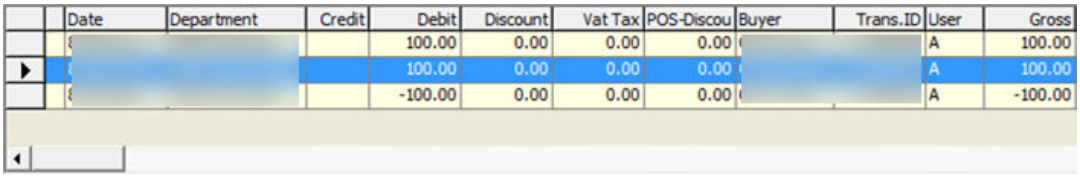
   In the Void Posting Reason window, insert the void reason or select from the drop-down menu, then press **OK**.

Figure 7-58 Void Reason Prompt



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3. Void postings appears with a matching debit and credit amount.



	Date	Department	Credit	Debit	Discount	Vat Tax	POS-Discou	Buyer	Trans.ID	User	Gross
				100.00	0.00	0.00	0.00			A	100.00
▶				100.00	0.00	0.00	0.00			A	100.00
				-100.00	0.00	0.00	0.00			A	-100.00

Pay Invoice

The Pay Invoice function posts a settlement against an invoice, whether a partial or full payment. The process of settling an invoice by credit card and foreign currency differs from cash settlement. This function requires an open Cashier session to post.

Figure 7-59 Invoice Payment Window

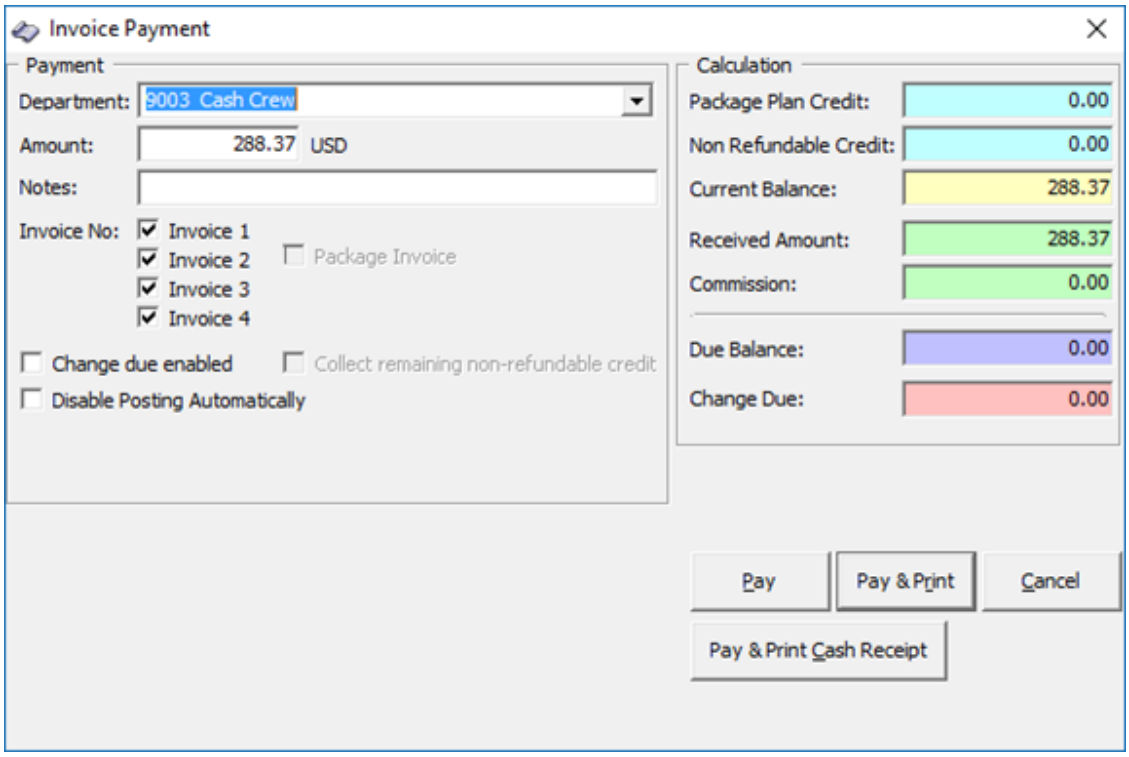


Table 7-20 Field Definition of invoice Payment Window

Field	Description
Department	Financial Department codes - Credit.
Amount	Total amount due by guest, depending on the invoice no. selection.
Notes	Additional Notes pertaining to this payment.
Invoice Number	Invoice number to apply the payment.
Change due enabled	Enable auto calculation of change due to guest.

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Table 7-20 (Cont.) Field Definition of invoice Payment Window

Field	Description
Disable Posting Automatically	Disable postings being posted into the invoice. This sets the Posting Allowed to No in Crew Info tab.
Package Plan Credit	Eligible credit value for Package Plan posting.
Non Refundable Credit	Credit value non-refundable to guest.
Current Balance	Current Invoice Balance.
Received Amount	Amount received.
Commission	Applicable credit card/foreign exchange commission value. Calculate when Charge 1% Commission is ticked or when foreign exchange has commission defined.
Due Balance	Outstanding sum after deducting payment applied.
Change Due	Balance due to crew when payment applied is more than invoice value.
Pay	Apply payment receipted and does not print cash receipt.
Pay & Print	Apply payment receipted and print invoice at the same time.
Pay & Print Cash Receipt	Apply payment receipted and print cash receipt at the same time.

Payment by Cash, Change Due

The Change Due function calculates the amount of change due to a crew when the payment method is either cash or foreign currency. You can set the "change due enabled" to be permanently selected. If this is not set as the default, you must check this option to activate automatic change due calculation when applying a payment.

Paying an Invoice by Cash

1. Retrieve the crew account from the Search Panel and click **Pay Invoice** in the Crew Handling window.
2. The system defaults the payment department according to the payment method defined during check-in. Select **Payment Department** from the drop-down menu, either Cash or Foreign Currency.
3. Select an **invoice** to apply the payment and the system calculates the total amount due by guest.
4. Enter the amount to settle.
   - If **Change due enabled** is selected, and the amount entered is more than the Current Balance, the system automatically calculates the amount and sets the invoice to Zero balance. See Figure 7-60.
   - If the payment is applied without the **Change due enabled** selected, the system posts the amount as a negative value in **Due Balance** field, resembling a deposit. See Figure 7-61.

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- If the payment is an exact amount, the system posts the value as payment receipted with the **Due Balance** or **Change Due** amount field as 0.00. See Figure 7-62.

Figure 7-60 Invoice Payment with Change Due

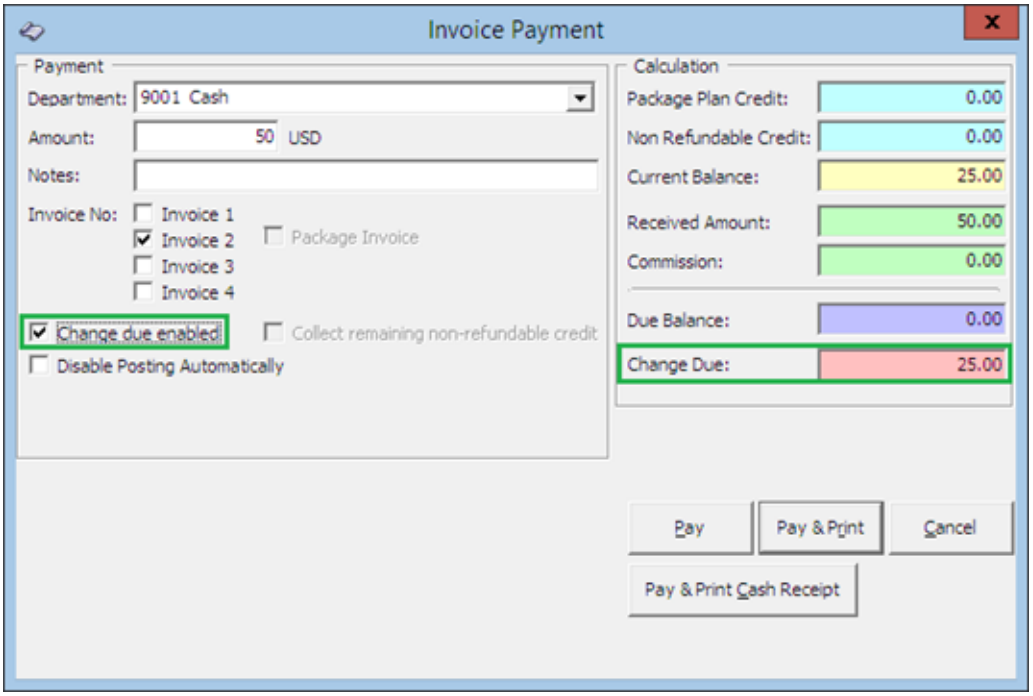
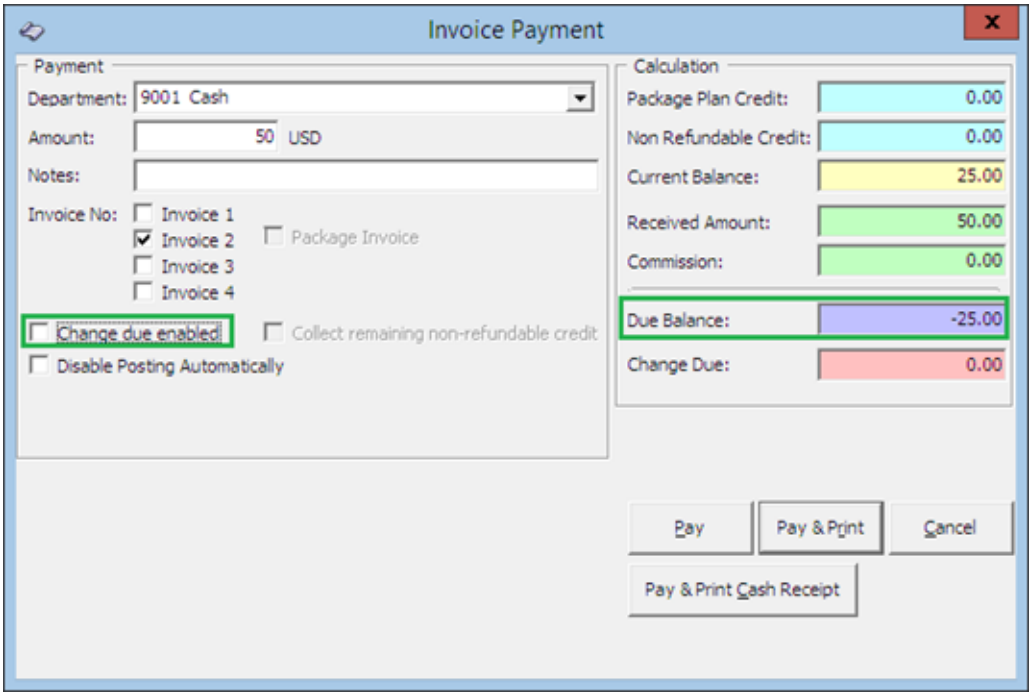
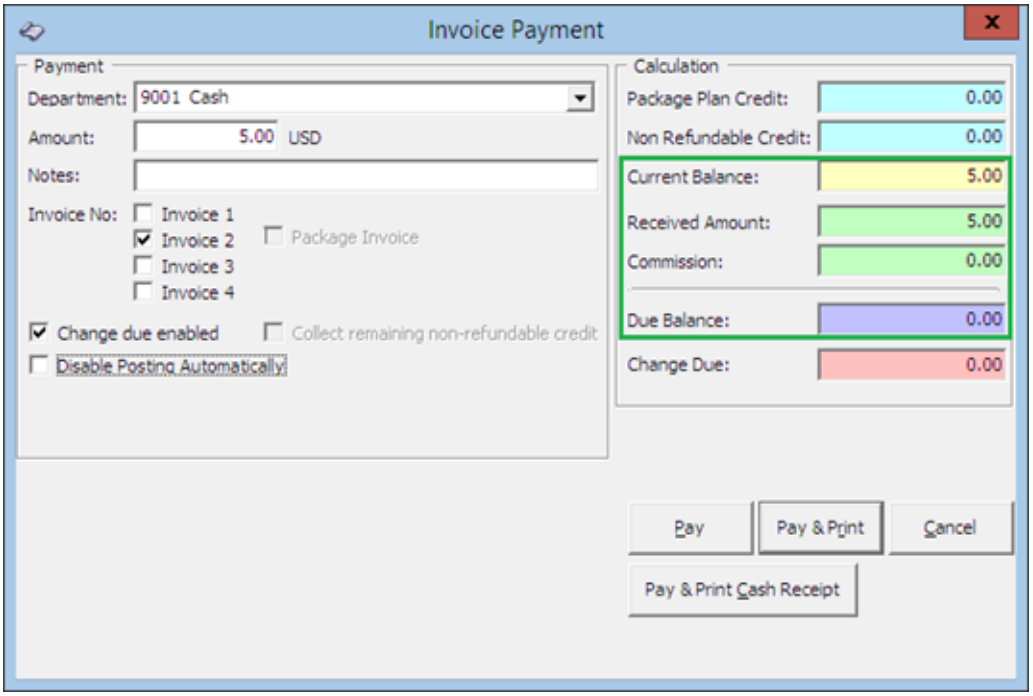


Figure 7-61 Invoice Payment without the Change Due



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Figure 7-62 Invoice Payment with Exact Amount



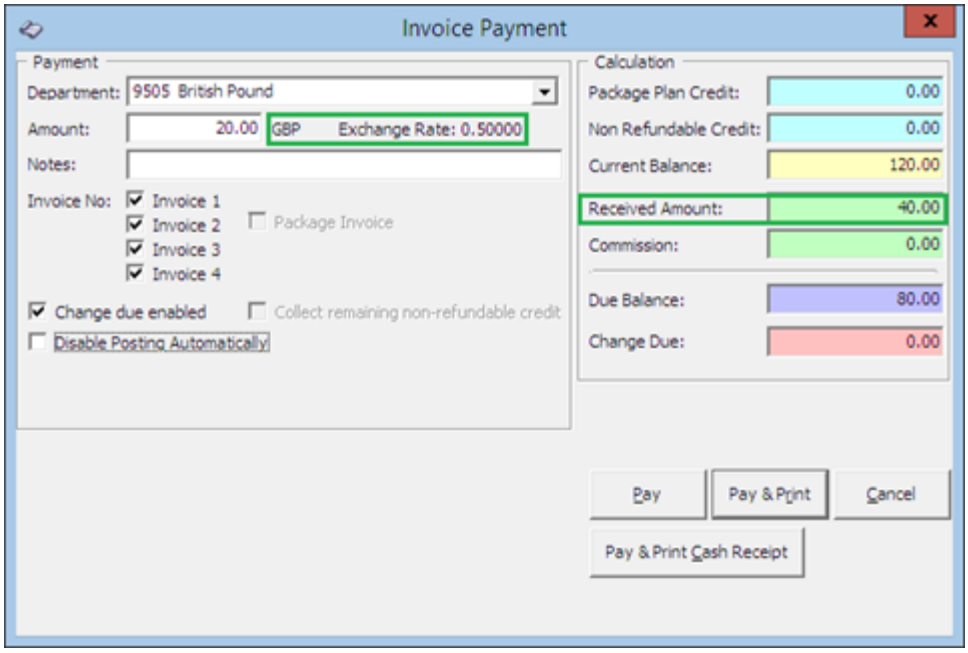
5. Press either **Pay, Pay & Print or Pay & Print Cash Receipt** to complete the transaction. If **Pay** is selected, print a copy of the invoice for crew reference.

Paying an Invoice with Foreign Currency

1. Repeat steps 1 and 2 of the above and select a **Foreign Currency Financial Department**.
2. The exchange rate of the selected payment method appears next to the amount field.
3. Enter the **foreign currency amount** in the Amount field and the converted value appears in Received Amount.

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Figure 7-63 Invoice Payment with Foreign Currency



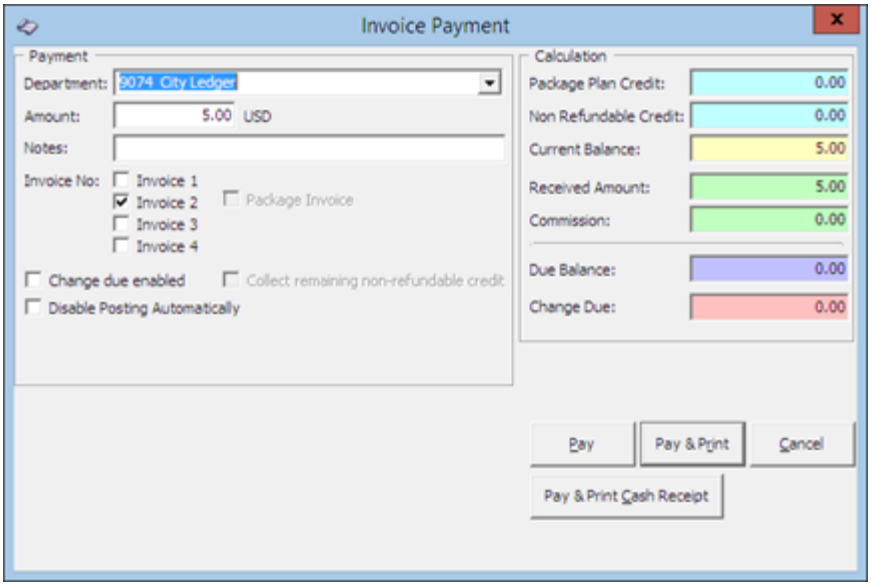
4. If the exchanged amount in foreign currency is more than the invoice amount, the system automatically calculates the change due amount in Ship currency when **Change Due Enable** is set as default.
5. Select an invoice to apply this payment to and recalculate the total amount due by guest.
6. Select either **Pay, Pay & Print** or **Pay & Print Cash Receipt** to complete the transaction.

Paying an Invoice by City Ledger

1. Retrieve the crew account from the Search panel, then click **Pay Invoice**.
2. In the Payment Department field, select a **City Ledger code**.
3. Select an **invoice** to settle, and the system calculates the total amount due by guest.
4. Insert the amount to settle. If the exact amount is paid, the system sets the value as payment receipted and Due Balance is 0.00.

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Figure 7-64 Invoice Payment by City Ledger

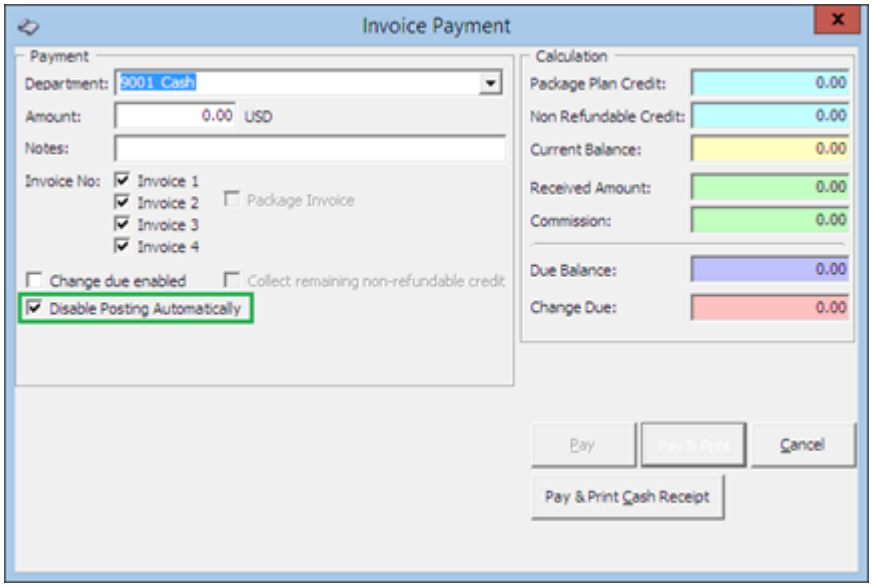


5. Select **Pay** or **Pay & Print** to complete the transaction. If **Pay** is selected, print a copy of the invoice for crew reference.

Disabling a Posting

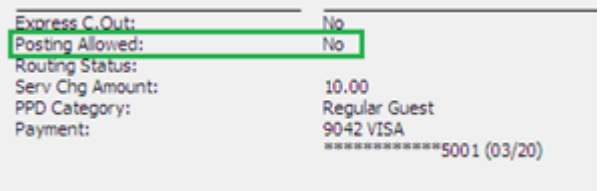
In the Invoice Payment window, selecting the **Disable Posting Automatically** checkbox sets the Posting Allowed to **No** in the Crew Info tab when the invoice balance is 0.00.

Figure 7-65 Disable Posting Automatically



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Figure 7-66 No Posting Allowed in Crew Info Tab

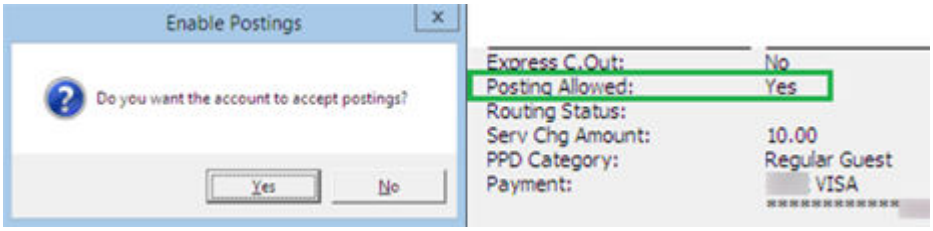


You will receive a notification when you try to post a charge to the invoice, and the posting will be rejected.

Resetting Posting Status to Allowed

1. Click the **Posting Status** in the Crew Info tab.
2. At the Enable Posting prompt, select **Yes** to confirm. This will reset the posting to allow.

Figure 7-67 Reset Posting Status

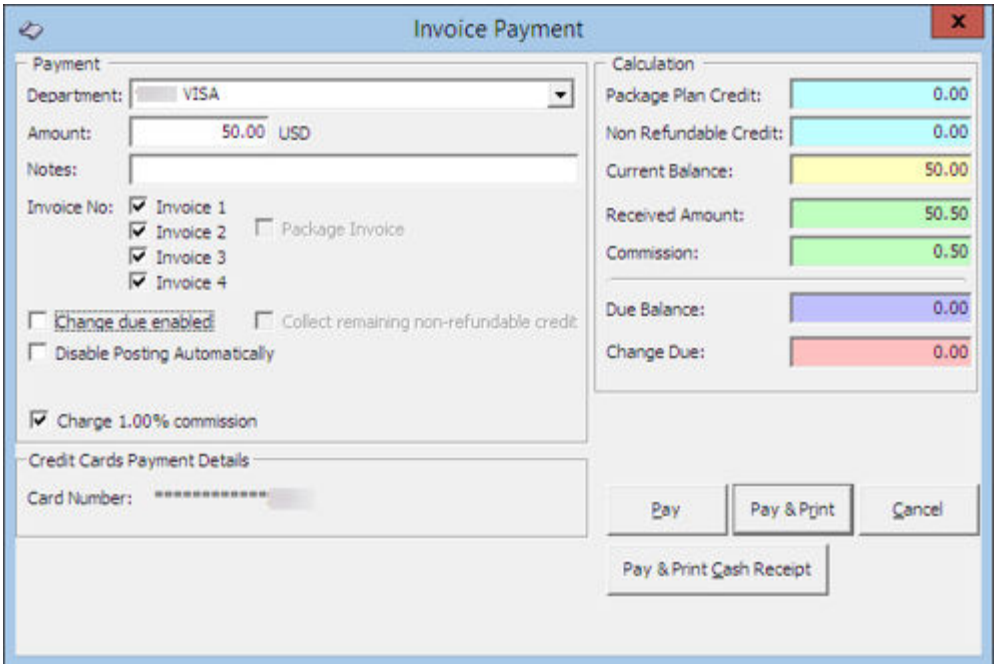


Payment by Credit Card

1. Retrieve the crew account from the Search Panel, and click **Pay Invoice**.
2. In the **Invoice Payment** form, select the **Payment department** from the drop-down list if it is different from the previous payment method.
3. The amount indicated is based on the current outstanding invoice (selected), for example, Invoice 1 balance = $30, Invoice 2 balance = $20. When all invoices are selected, the total becomes $50. If you are paying a specific invoice, deselect the other invoices and adjust the amount accordingly.
4. The percentage (%) commission shown is based on the commission rate set up in *Administration, Financial Department codes* and is selected by default. The commission chargeable appears in the Commission field. If the commission is not applicable, deselect the field.
5. Press **Pay** or **Pay & Print** to complete the transaction. If Pay is selected, print a copy of the invoice for crew reference.

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Figure 7-68 Credit Card Commission Selection



Print Invoice

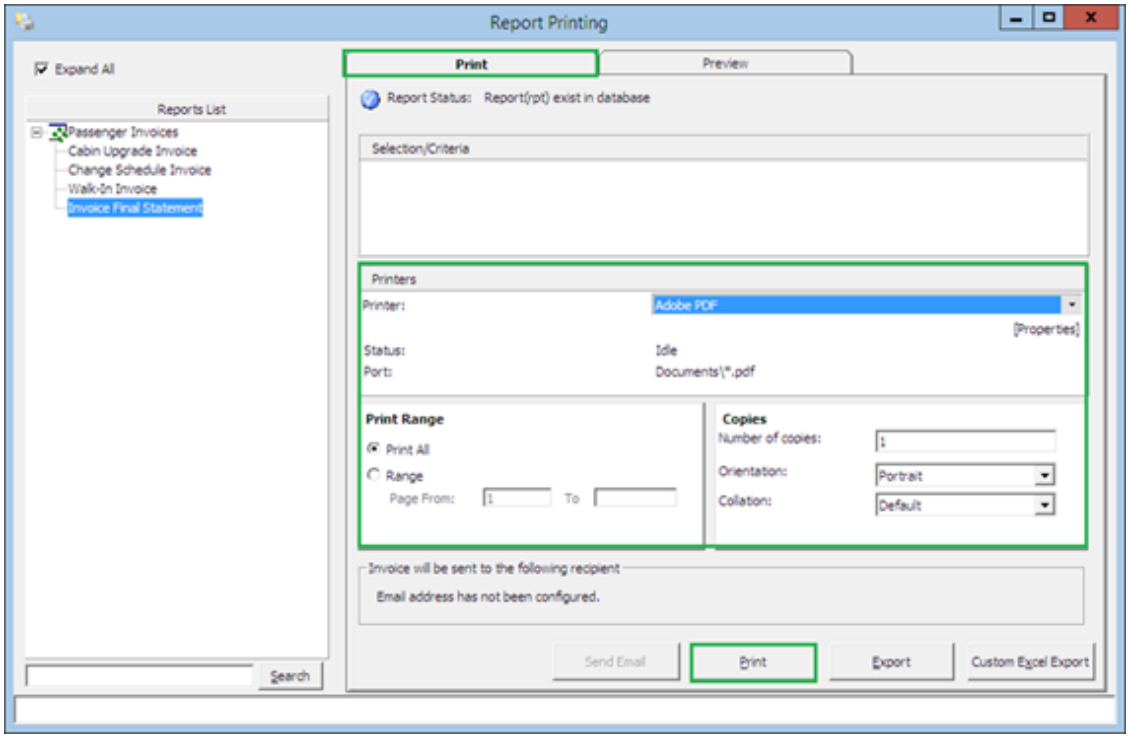
The Print Invoice function is similar to the Guest Handling print invoices. It enables you to print invoices in different layouts made available by the Ship. It has a preview function that allows you to view an invoice/statement prior to printing a hard copy invoice.

Printing an Invoice

1. Retrieve the reservation from the Search Panel, and click **Print Invoice**.
2. Select the invoice report to print from the **Report List**.
3. In the Print tab, select the printer, print range, and copies to print.
4. Press **Print** to send the print job to printer.

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Figure 7-69 Print Invoice Window

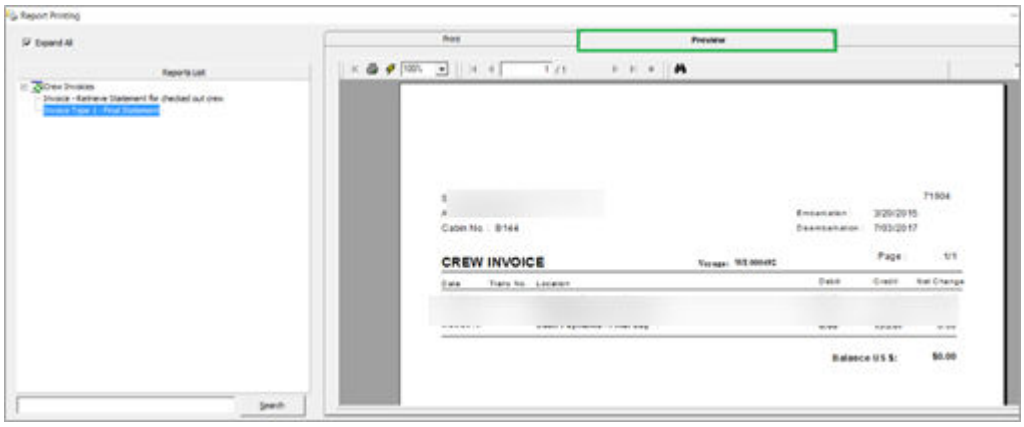


Previewing an Invoice

To preview an invoice before sending the job to a printer,

1. Repeat steps 1 to 2 of Printing an Invoice.
2. Navigate to the Preview tab to view the invoice.
3. Press the **Printer icon** to send the print job to printer.

Figure 7-70 Preview Invoice Before Printing



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Email Invoice

In a paperless environment, you can send a copy of the invoice to the guest's email account only when you have an on-board email account listed in the crew account. A special setup by the System Administrator is required before you can email an invoice.

Email an Invoice

1. Repeat steps 1 to 2 of Printing an Invoice.
2. In the Print tab, select **Send Email**. The system prompts a dialog box once the email is sent successfully.
3. Click **OK** to close the dialog box.

Exporting an Invoice

Exporting of invoices to other file formats is possible. Supported file formats are: Acrobat Format, Crystal Report, MS Word, MS Excel and more.
Repeat steps 1 to 2 of Printing an Invoice.

1. In the Print tab, select **Export**.
2. Select the **file format** and **destination type** from the drop-down list when prompted.
3. Select the **page range** to print.
4. Enter the **file name** and **location path** when the system prompts for file saving location.

Custom Excel Export

This function exports the invoice into a predefined Excel format.

1. Repeat steps 1 to 2 of Printing an Invoice.
2. In the Print tab, select **Custom Excel Export**.
3. Enter the **file name** and **location path** when the system prompts you for a file saving location.

Move & Route

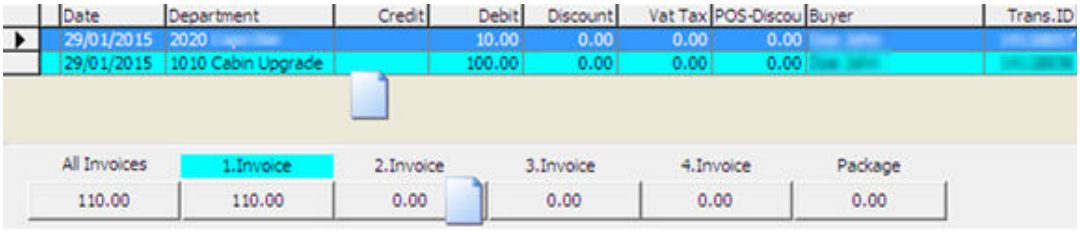
The Move and Route function enables you to set up your bills at the time of credit sign up, during the cruise or at the end of the cruise when a crew would like to separate certain charges from the main invoice. You can move the charges easily using the drag and drop method and other available methods that suit the operations.

Moving a Charge from one Invoice to another

1. Select the **crew account** and navigate to the Invoice tab.
2. Highlight the transaction to move.
3. Press **CTRL** and hold down the left mouse button.
4. Drag the transaction to the location by moving the mouse pointer.
5. Drop the object by releasing the left mouse button.

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Figure 7-71 Move & Route Function



6. The original invoice amount decreases and the newly created invoice amount increases.

Setting up a Charge Route

The following functionalities allow crew to separate certain charges to be posted to another invoice throughout the cruise or route them to another account. It might be more feasible to set up routing instructions to move both current and future postings to a new invoice.

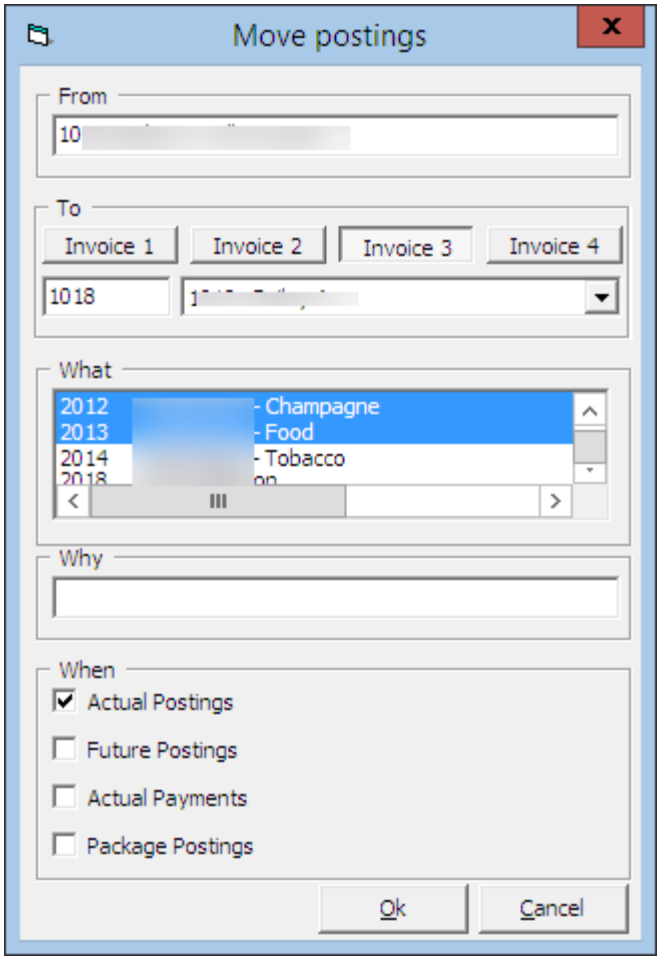
1. Select the **crew account** and navigate to the Invoice tab.
2. Click **Move & Route** to open a Move posting menu.

Table 7-21 Definition of Move Posting Tab

Field	Description
From	Default to Crew account, All Invoices.
To	Selectable invoice from Invoice 1 to 4 or another guest/payer account.
What	Department Group or Financial Department code to route.
Why	Reason why charges were routed.
When	Type of posting to route.

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Figure 7-72 Move Posting Tab



3. The system default main invoice is All Invoices. Select the **invoice** where the charges should be routed.
4. To route the charge to another guest/payer, enter the **cabin number** and select the **crew name**.
5. Select either the **department group** or **financial department code** to route, and insert the routing reason.
6. Select the type of posting to route — actual/future postings or actual payments.
7. If **Future Postings** is selected, the system automatically places the department code in **Disc, Route, Pkg tab, Routing** window.

   See also Disc, Route, Pkg Tab.

Criteria Discount

The following function works the same as Percentage Discount in Disc, Route, Pkg tab and has an additional checkbox for Actual Postings, allowing you to apply a discount to the actual posting. This function creates a record in the discount section of Disc, Route, Pkg tab when Future Posting is selected.

See Disc, Route, Pkg Tab, *SPMS Discount* on how to apply a discount.

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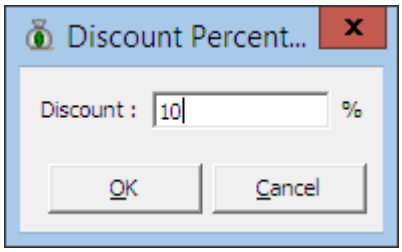
Item Discount

The Item Discounts deducts a specific percentage of selected postings on the crew invoice. The Percentage discount cannot be used as a value discount.

According an Item Discount

1. On the Invoice of the account, mark the posting entitled to the discount, and click the **Item Discounts** button.
2. Insert the **percentage value** in the discount field, and click **OK** to proceed.

Figure 7-73 Item Discount



3. The system posts an adjustment (reverse) against the original posting, sets the adjusted posting to **No Print** automatically, and reports the correct value with the discount value indicated.

Figure 7-74 Example of Item Discount Transactions

Date	Department	Debit	Discount	Vat Tax	POS-Discou	Trans.ID	Gross	Check#
30/01/2015	3070 Minibar	-20.00	0.00	0.00	0.00	14118914	-20.00	123
30/01/2015	3070 Minibar	18.00	2.00	0.00	0.00	14118915	20.00	123
30/01/2015	3070 Minibar	50.00	0.00	0.00	0.00	14118912	50.00	123
30/01/2015	3070 Minibar	20.00	0.00	0.00	0.00	14118912	20.00	123

Hide No Print

This function hides transactions that are marked with No Prints, giving an organized view of the invoice. For example, a voided transactions.

Hiding/Showing No Prints Transactions

Hiding/Showing No Prints Transactions

1. Click the **Hide No Prints** to change the button from **Hide No Prints** to **Show No Prints**, or vice versa.
2. Transactions marked with **No Prints** (pale yellow) are hidden from the invoice window until you click the **Show No Prints**.

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NoPrint

This function enables excluding past settlements or voided postings from being printed onto the invoices, and the transaction value must equals to 0.00. The system prompts an error if the balance of the transaction does not equal 0.00

Resetting No Print Transactions to Original State

1. Select the NoPrint transactions and click **No Print**.
2. Transactions revert to normal postings and no longer appear in pale yellow.

Set Credit Limit

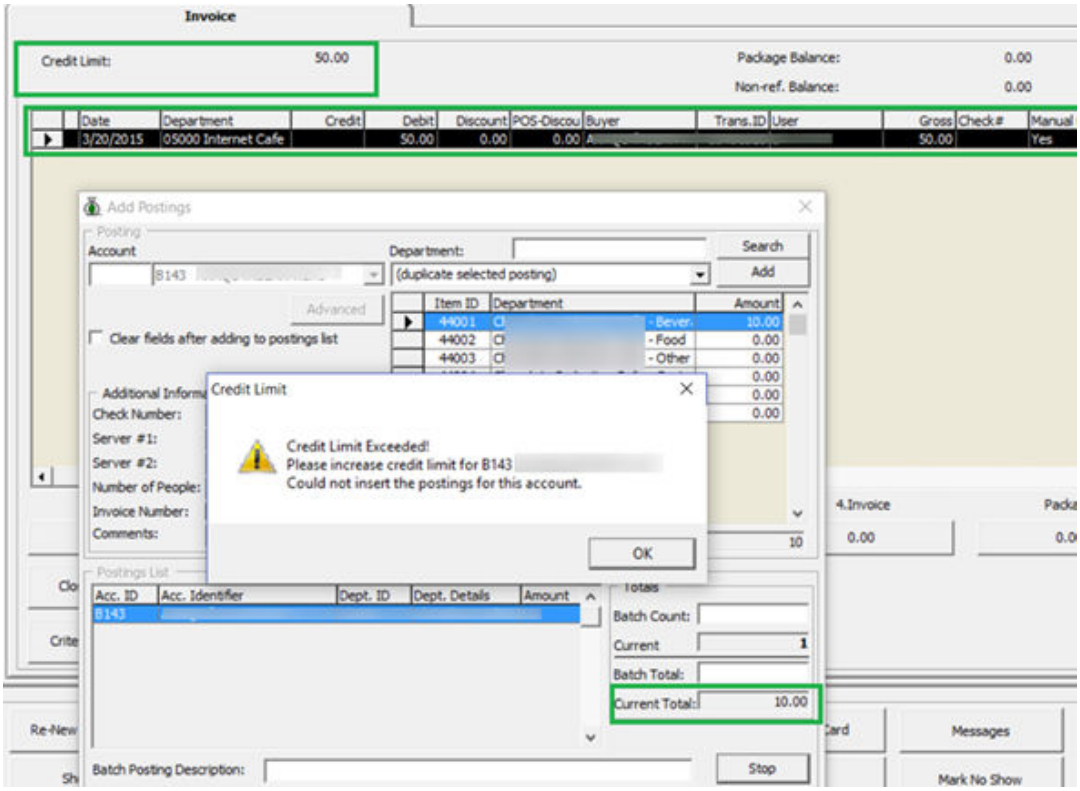
The floor limit is pre-set within the Financial Credit Sub-Department code and is adjustable for specific crew at the jurisdiction of the Chief Purser.

Setting a Credit Limit

1. On the Invoice tab, click **Set Credit Limit** button.
2. Insert the credit value in the dialog box, and click **OK** to override the pre-set credit limit defined in Credit Sub-Department code.
3. If the account exceeds the floor limit or the individual limit, the system prompts a ‘Credit Limit Exceeded’ on both SPMS and POS System during posting and you cannot proceed to post. The same warning prompt appears if the account is routed and payer has a Credit Limit defined.

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Figure 7-75 Warning Prompt When Credit Limit Exceeded



Consult your Chief Purser/Front Desk Manager or refer to the Ship's Operating procedure for the next course of action.

> **Warning**
>
> Once the account is closed, this *cannot be undone*.

Close Posting

The Close Posting function generates an interim invoice and closes the zero balanced account without checking out the account. This function does not work when the account still has a balance.

Closing an Account with Close Posting

1. Retrieve the account and navigate to the Invoice tab.
2. Ensure all invoices are 0.00 balance. You will receive a notification prompt when the balance is not zero. Click **OK** to return to the previous window.
3. If the account is balanced, click **Close Postings**.
4. Select **Yes** when the system prompts you for a response. If you select **No**, you are returned to the Invoice tab without closing the postings.
5. Select the **Hide Posting** button on the Invoice tab to hide all closed postings.

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More Crew Info Tab

The More Crew Info tab stores additional information such as Other Related Information, Visa/ Customs Info and Live Picture update from the main reservation and Crew Info tab.

Figure 7-76 More Info Tab



Take Picture Option

The Take Picture option captures the current crew picture and share it with other modules, enabling other users to easily recognize the crew when dealing with them. The supported picture file format is .jpg or .bmp.

Cruise Reservation Related Info

The Other Related Info section displays the Crew Travel Insurance Number and the number of days worked from the original joined date.

Visa/Customs Info

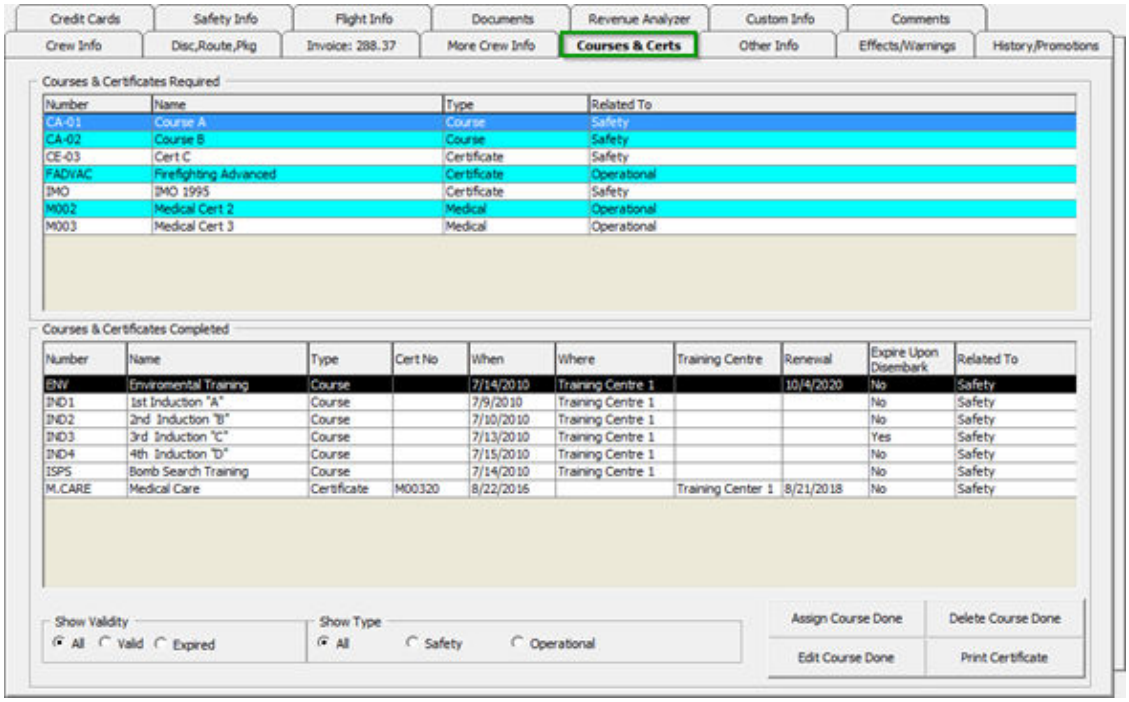
This section displays the information entered in the Edit Reservation form.

Courses & Certs

All crew members are required to complete the safety and operational courses throughout their tenure, and these courses are recorded the in Course & Certs tab. The required courses/ certificates are listed at the top section and completed course in the bottom section of the tab.

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Figure 7-77 Courses & Certificates Tab

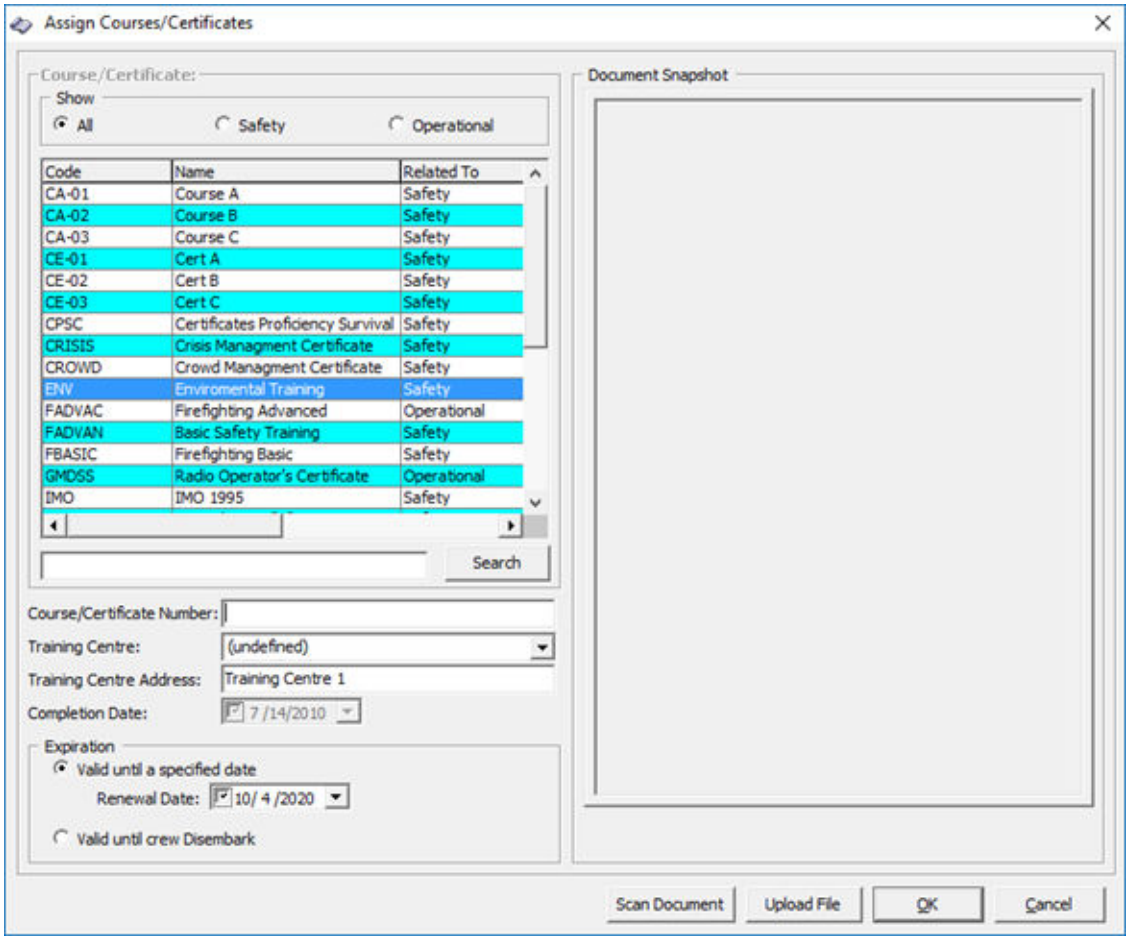


Assigning Course Done

When a crew completes an assigned course, the course information such as certificate number, course location and validity are updated in the system.

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Figure 7-78 Course/Certificate Assignment Window



1. Select the **course name** from Courses & Certificates Completed section.
2. Click **Assign Course Done**.
3. In the Assign Courses & Certificates form, enter the **Course/Certificate number** and select the **Training Center** from the drop-down list.
4. Update the completion date and select the expiration date accordingly.
5. Once you update the completion date, you cannot change it.
6. Select either **Scan Document** or **Upload File** to store a copy of the certificate.
7. Click **OK** to update the course details.

Editing Course Done

1. Select the **course name** from the Courses & Certificates Completed section and click **Edit Course Done**.
2. In the Assign Course/Certificates form, update the necessary information.
3. Click **OK** to save.

Deleting Course Done

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You can delete a completed course from the grid if you have access rights #740 assigned.

1. Select the **course** to delete and click **Delete Course Done**.
2. At the confirmation prompt, click **Yes** to complete the deletion.

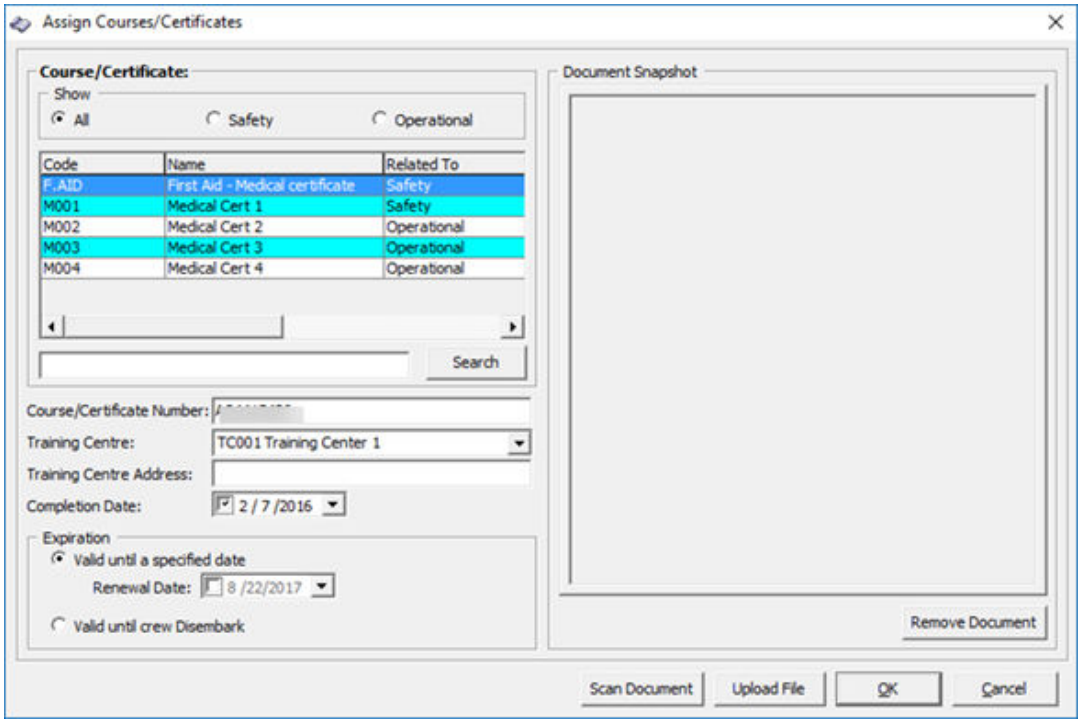
Other Info Tab

In the Other Info tab, the crew medical certificates and uniform inventory are stored. You can also enable/disable the cabin telephone from here, this only work with an interface.

Assigning/Editing Medical Certificates

1. Retrieve the account navigate to the **Other Info** tab.
2. Click **Assign** to open the Courses/Certificates window.

Figure 7-79 Assign Course/Certificates



3. Select the type of **Course/Certificate to show** or use the Search field to search for a specific course/certificate.
4. Select the item from the courses displayed.
5. Enter the Course/Certificates Number, Training Centre and the center's address, if any.
6. Select the **Completion Date** using the date-editor.
7. In the Expiration section, select the **validity** of the certificate.
8. Click the **Upload File** to upload a copy of the certificate or use the Scan Document feature to scan a copy of the certificate, if any. This functionality requires an installed scanner.
9. Click **OK** to complete the process.
10. To edit the certificate, select the **certificate** from the list and click **Edit**.

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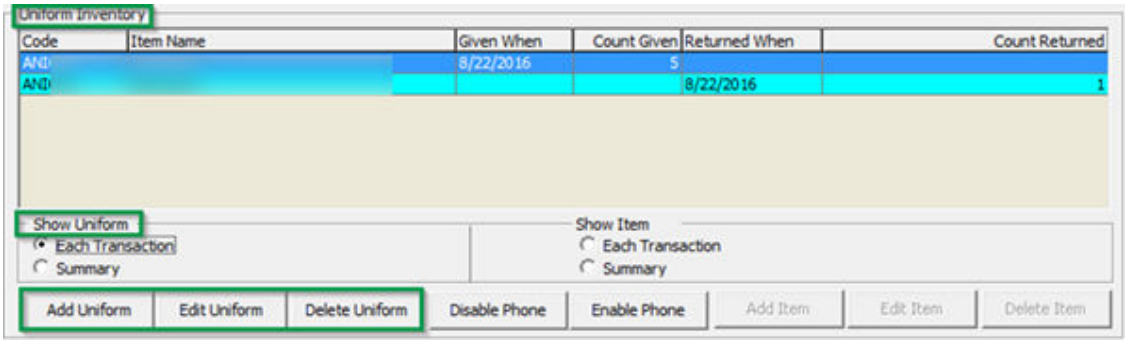
11. Change the necessary information and click **OK** to save.

Uniform Inventory

This functionality records uniforms issued to/returned by the crew. The function buttons are enabled depending on the type of transaction to show.

Adding/Returning Uniform

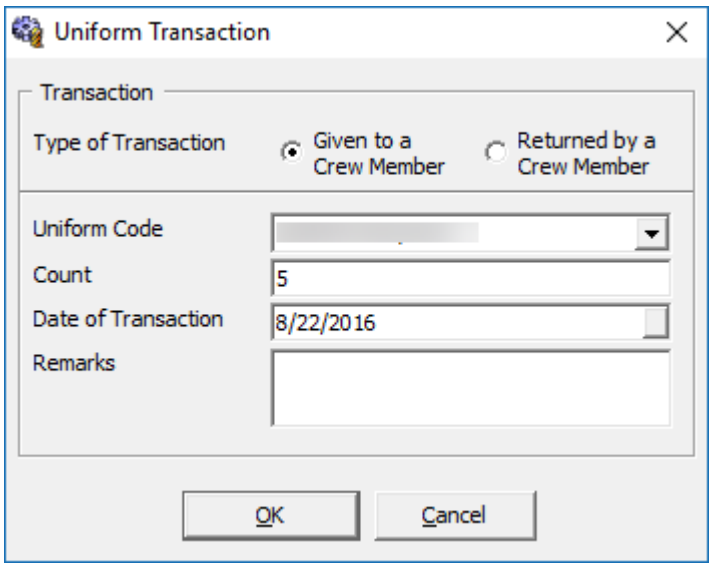
Figure 7-80 Crew Uniform Inventory



To add or return a uniform:

1. Retrieve the account and navigate to the **Other Info** tab.
2. Under the Uniform Inventory section, select **Show Uniform** and the **transaction type** to enable the function buttons.
3. Click **Add Uniform** to open the Uniform Transaction window.

Figure 7-81 Assign Course/Certificates



4. Select the **type of transaction** and the **uniform code** from the drop-down list.

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5. Enter the **Count** and select a **date** from Date of Transaction.
6. Click **OK** to save the transaction.

Editing Uniform Inventory

This function allows you to edit the transaction record, for example the count and date of transactions. However, you are not allowed to edit the transaction type.

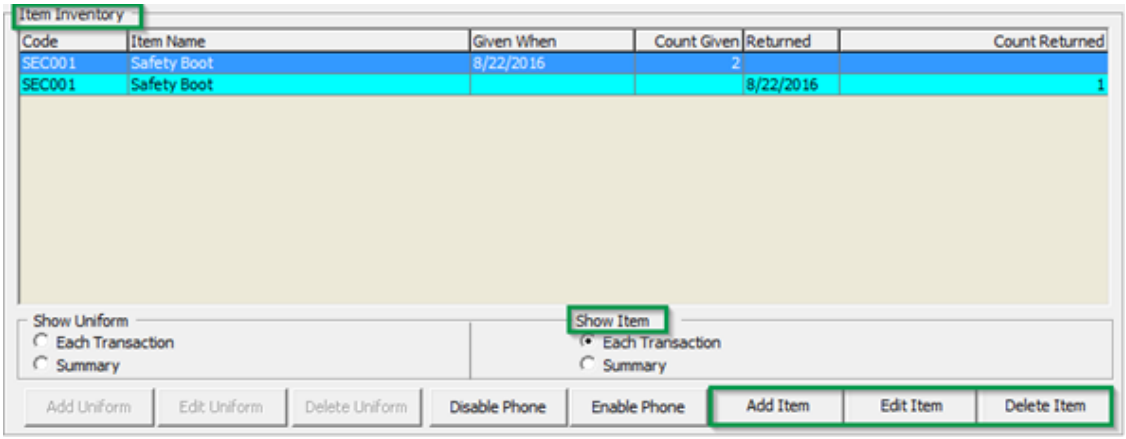
Deleting Uniform Inventory

When a transaction type is entered incorrectly, you must first delete the transaction before entering the correct transaction.

Adding/Returning Uniform Items

The function of this feature is the same as Uniform Inventory, except that it records the inventory at the item level.

Figure 7-82 Item Inventory



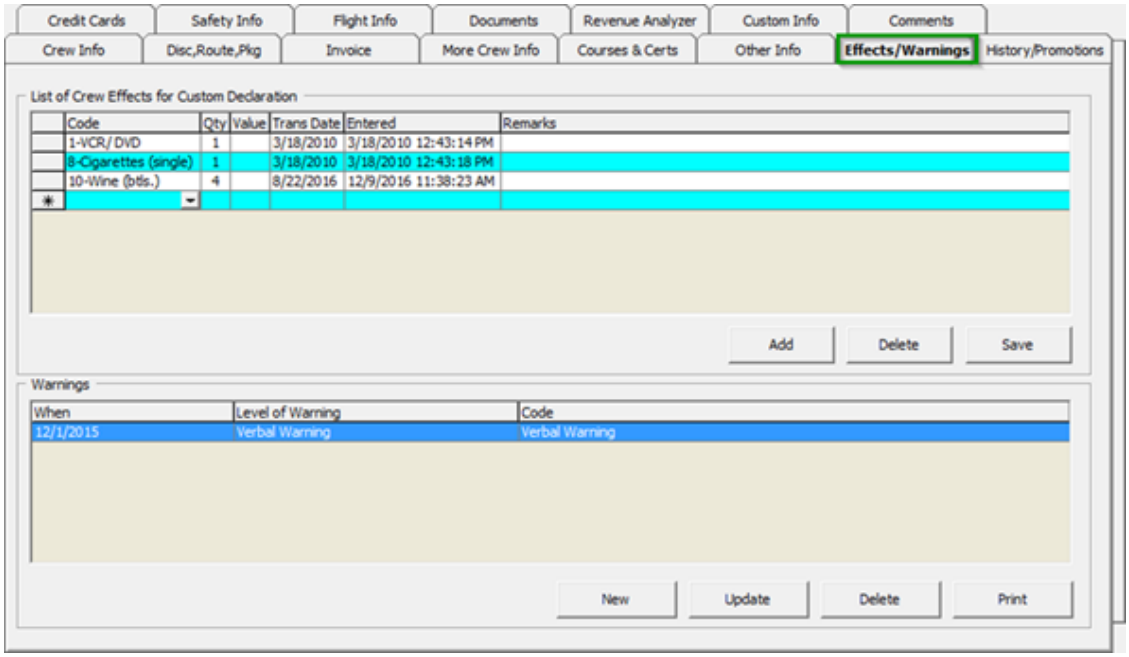
To enter an item, repeat the steps of *Adding/Returning Uniform* and select **Show Item** to enable the function buttons.

Effects/Warnings

In the Effects/Warning function, any items that are prohibited, confiscated, or submitted for Customs Declaration are recorded, including warnings issued to the crew.

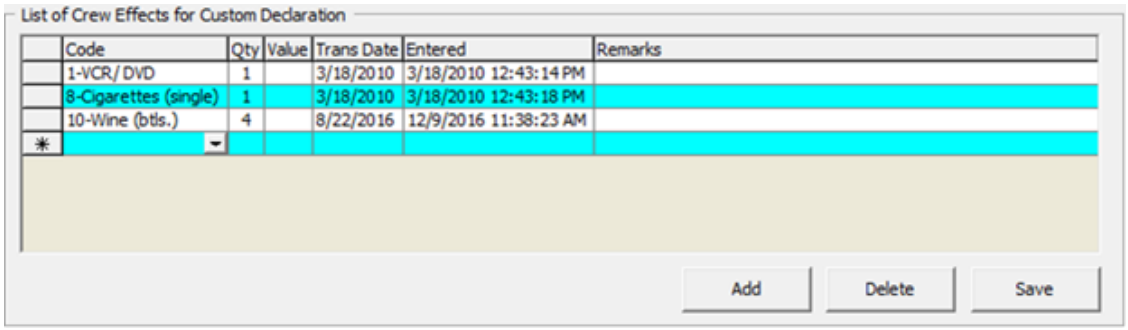
Copyright © 1995, 2025, Oracle and/or its affiliates.

Figure 7-83 Effects/Warning Tab



Effects Item

Figure 7-84 List of Crew Effects



To add or delete an item,

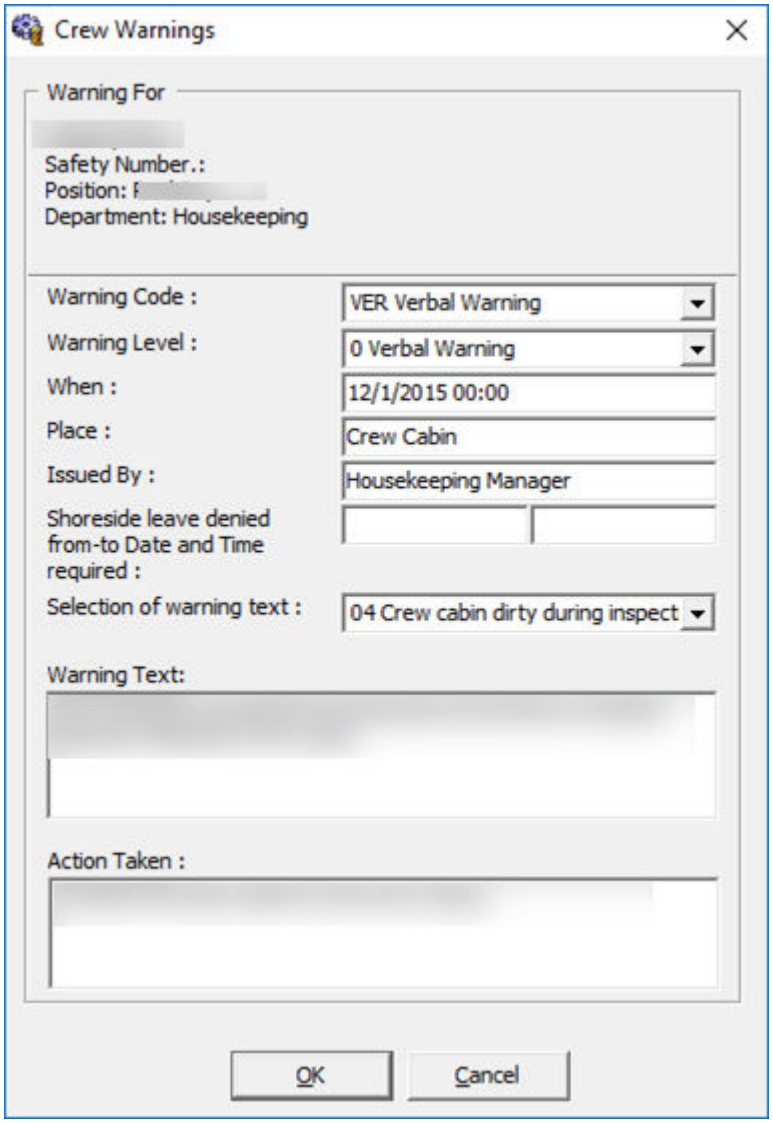
1. Retrieve the account and navigate to the **Effects/Warning** tab.
2. Under the List of Crew Effects for Custom Declaration section, click **Add**.
3. At the Code field, select the item from the drop-down list, enter the quantity, and enter the transaction date.
4. Click **Save** to save the record.
5. To delete an item, select the **transaction** and click **Delete**.
6. At the confirmation prompt, select **Yes** to complete the deletion.

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Warnings

The Warnings function enables the Ship operator to record any warnings given to the crew, be it verbal or written and by severity.

Figure 7-85 Crew Warning



Adding A Warning

1. Retrieve the account and navigate to the **Effects/Warning** tab.
2. Under the Warnings section, click **New**.
3. At the Crew Warning window, select the **Warning code** , and the **Warning level** and enter **When, Place**, and **Issued By** information in the respective fields.
4. Insert a **Shoreside leave denied period from/to**, if any.

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5. Select the **warning type** from the drop-down list and enter the **warning text** and **action** taken against the crew.
6. Click **OK** to save the record.
7. To update a warning record, double click the item and update the necessary information, and click **OK** to save the changes.
8. To delete a warning, select the **line item**, click **Delete**, and click **Yes** at the confirmation prompt.

History/Promotion Tab

The History tab stores future and past reservation records, as well as the promotion/demotion during the crew's tenure. Other than the **Future Reservations** section where you can insert, edit and remove a reservation, the rest of the information on this window is not editable.

Figure 7-86 History/Promotion Tab

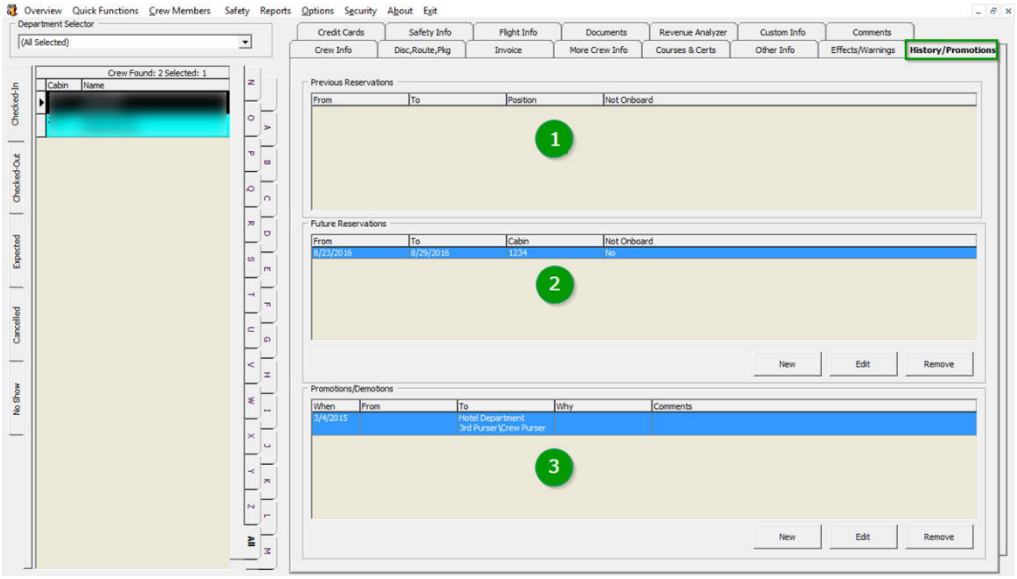


Table 7-22 Field Definition of History Tab

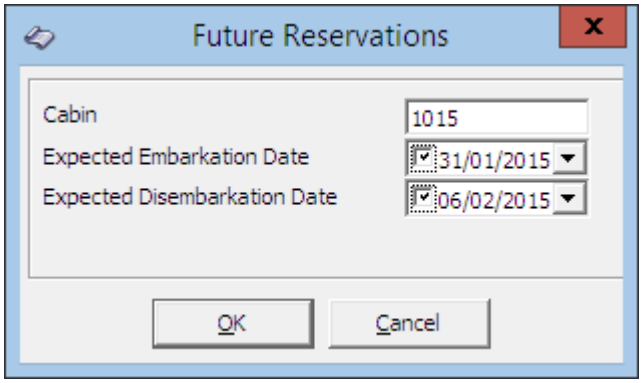
Field	Description
1	This section stores previous reservations by date, cabin number, notes and overall stay duration. Records are captured once the crew checks out.
2	This section stores the future reservations. During System Date Change, the system checks the future reservations records for expected embarkation that falls on the next system date and automatically renews them to Expected Arrival.
3	This section stores promotion/demotion history of crew during their employment.

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Creating Future Reservation

1. Click **New** to open the Future Reservations form.
2. Enter the **Cabin Number** and select the **Expected Embarkation/Disembarkation Date**.
3. Clicking **OK** to save and insert the record in the Future Reservation section.

Figure 7-87 Creating Future Reservation



Editing Future Reservation

In the Future Reservations dialog, do the following:

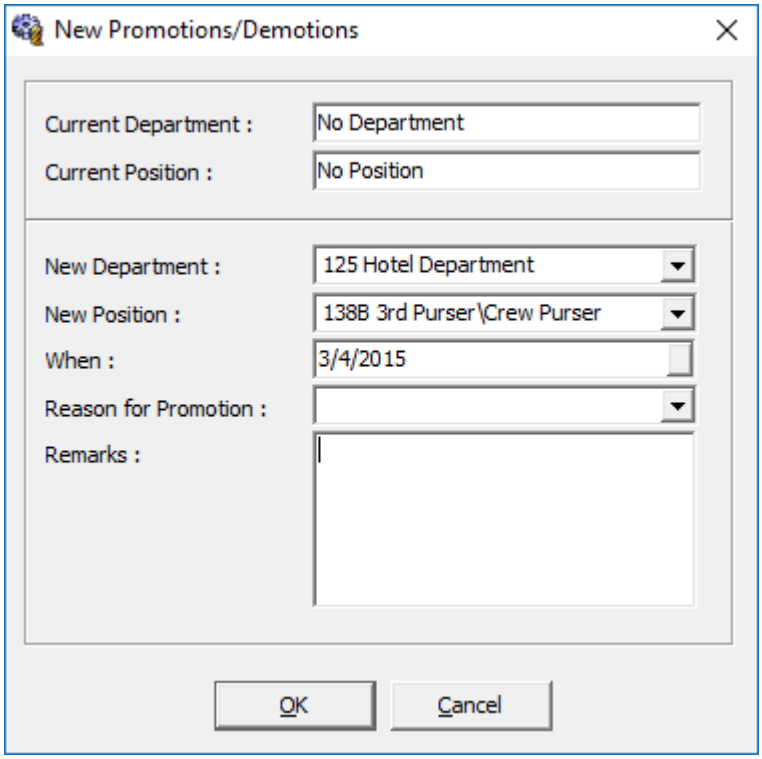
1. Enter the **Cabin number**.
2. Select the **Expected Embarkation Date** and the **Expected Disembarkation Date** using the drop-down list.
3. Click **OK**.

Adding Promotion/Demotion

1. In the Promotions/Demotions section of the crew, click **New**.

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Figure 7-88 Adding Promotions / Demotions



2. In the New Promotions/Demotions form, select the **New Department, New Position, When date,** and **Reason for Promotion** from the drop-down list.
3. Insert a remark if any, and click **OK** to save.

Get Credit Cards Function

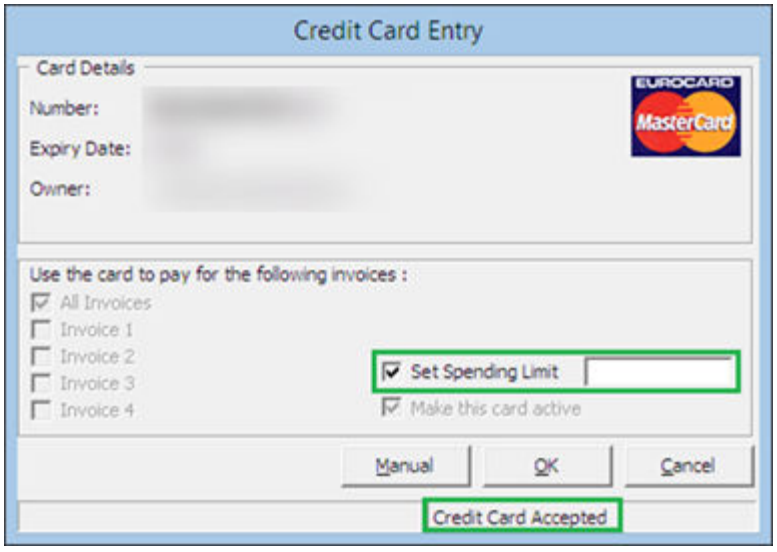
Similar to Get Credit function in Management module, this function enables you to update the crew's credit card details by swiping the card through the magnetic card reader.

Updating Credit Card Details

1. In the Search Panel, search for the crew, then click the **Get Credit Card** in the Crew Handling window to open the blank Credit Card Entry form.
2. In the blank Credit Card Entry form, swipe the credit card through the magnetic card reader, and the system auto populates the credit card details.

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Figure 7-89 Setting Credit Card Spending Limit

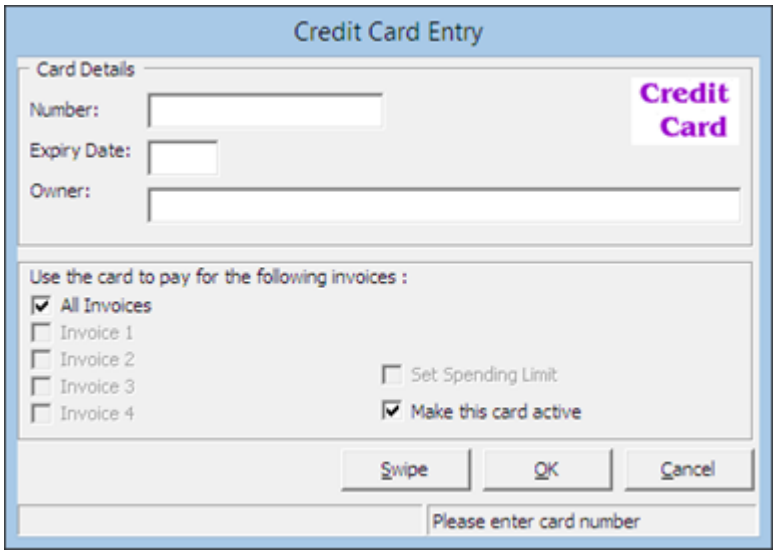


3. Select the **Set Spending Limit** to enter the credit limit of the card.

Manual Update of Credit Card Details

1. In the blank Credit Card Entry form, click **Manual**.
2. Manually enter the card information: credit card number, expiry date, and cardholder's name, and click **OK** to save.

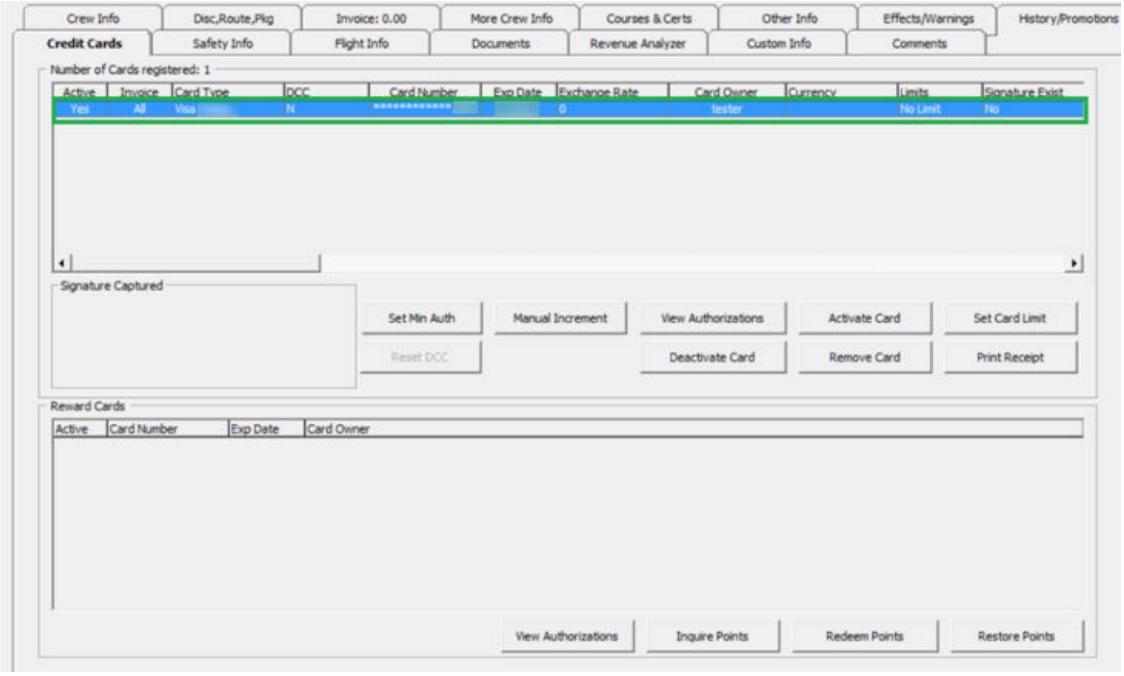
Figure 7-90 Manual Credit Card Entry Form



3. Click **Yes** at the CC Check prompt to update the credit card details on the crew account.
4. You can view the stored credit card details in the **Credit Card** tab.

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Figure 7-91 Crew Handling Credit Card Tab



Registering Multiple Credit Card

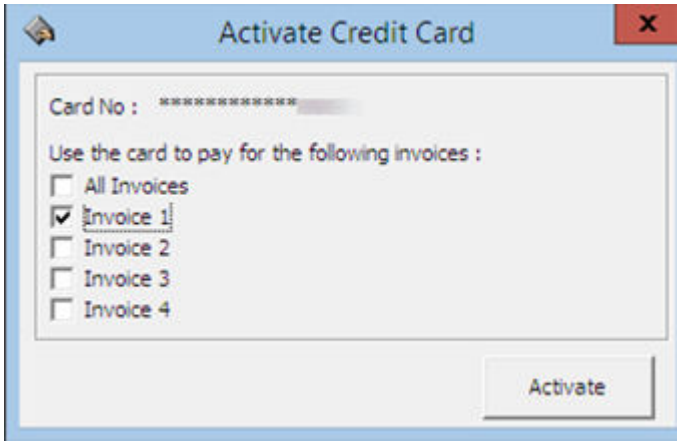
You can store multiple card types of a crew member for ease of settlement, which is useful when the crew decides to settle part of an invoice using a different card at the end of the voyage.

1. Repeat steps 1 to 3 of Updating Credit Card Details.
2. You will receive a prompt asking for confirmation to register more than one car. Select **Yes** at the CC Check prompt.

Activating Credit Card for a Particular Invoice

1. In the **Credit Card tab**, select the card to activate, and click **Active Card**.

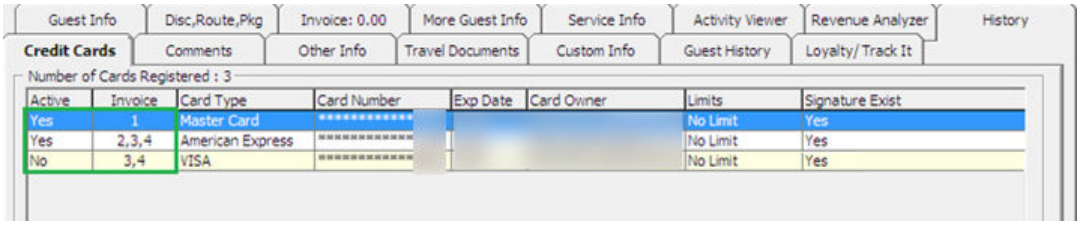
Figure 7-92 Activating Credit Card by Invoice



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2. Select the invoice at the **Activate Credit Card** prompt and click **Activate** to activate the card.
3. The selected invoice appears in the **Invoice column**, and the card is set as **Active**.

Figure 7-93 Multiple Credit Card Assignment



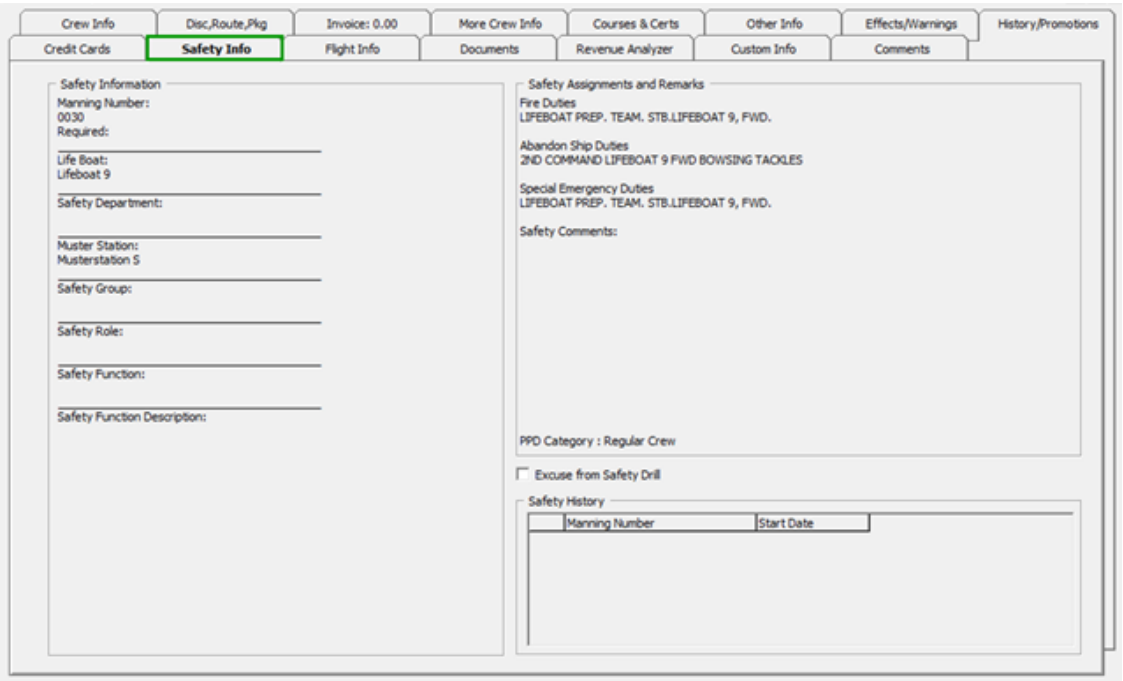
Capturing a Signature with Signature Device

Similar to Guest function, if a Signature Capture device is installed, you can store a sample of the crew signature in the Credit Card tab.

Safety Info

The Safety Info tab provides a view of the assigned Safety assignment of a crew member. All the information shown in this tab is updated through the Muster List Assignment function.

Figure 7-94 Safety Info Tab



Flight Info Tab

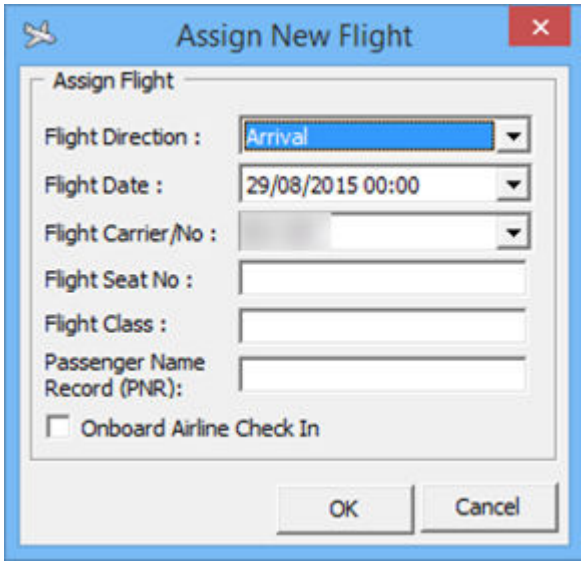
The Flight Info tab stores the crew flight assignment and home airport location, enabling you to schedule their flights and transfers closer to home airports.

Flight Assignment

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You can enter the Arrival/departure flight information and transfer arrangements in the Flight Assignment section.

Figure 7-95 Flight Assignment in Other Info Tab

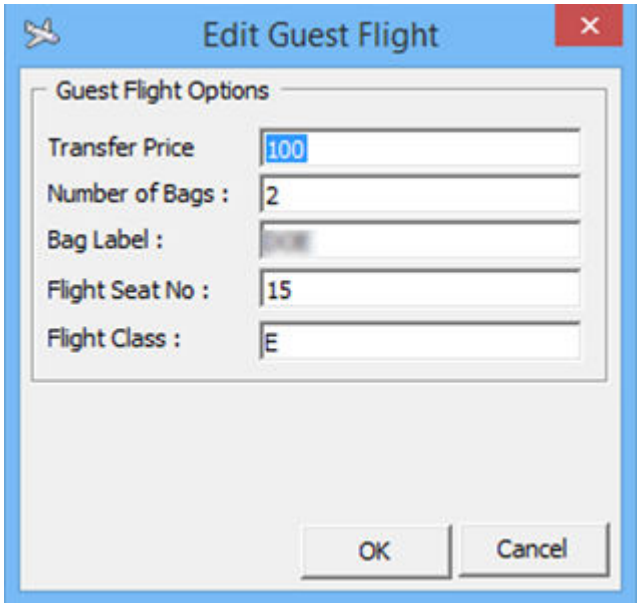


To Add an Arrival / Departure Flight Details

1. In the **Flight info tab, Flight Assignment** section, click **Add**.
2. Select the **Flight Direction, Flight Date**, and **Flight Carrier/No** from the drop-down list, and enter the **Flight Seat No, Flight Class**, and **Passenger Name**.
3. Click **OK** to save the record.

You can only use the Edit assignment to edit the transfer price, number of bags, bag label or seat number.

Figure 7-96 Edit Flight Assignment



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To add a Home Airport

1. At the Home Airport section, click the **Airport** field.
2. Select the **code** from the drop-down list for each field, and enter the validity of the home airport.

Documents Tab

The system stores details of the crew passport, identification or any travel documents captured through the passport/ID scanning device in this tab. The information is purged at the end of the cruise or according to the policy defined by the Ship.

Figure 7-97 Travel Documents Tab

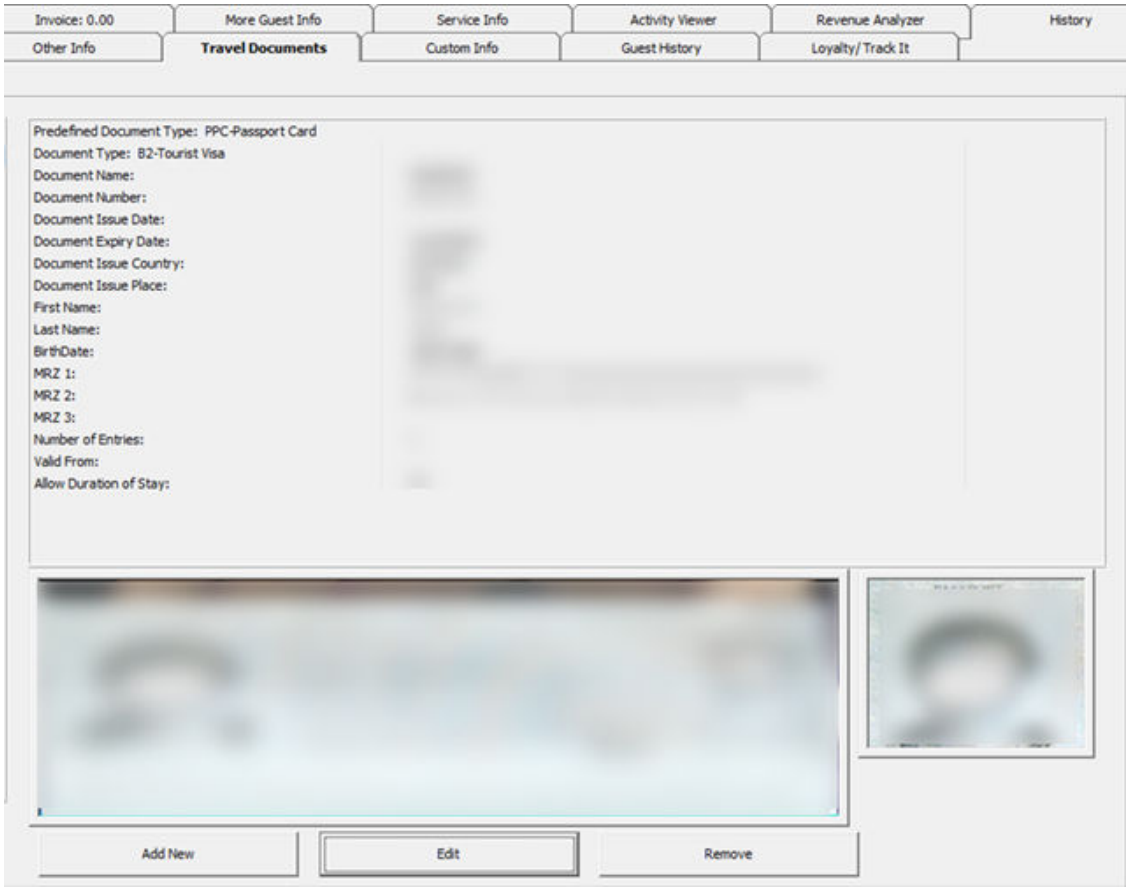


Table 7-23 Field Definition of Travel Documents

Field	Description
Predefined Document Type	Document type configured in Administration Module, For example, passport, identification card.
Document Type	Type of Visa.
Document Name	Document type.
Document Number	Passport or ID number.
Document Issue Date	Document issue date.

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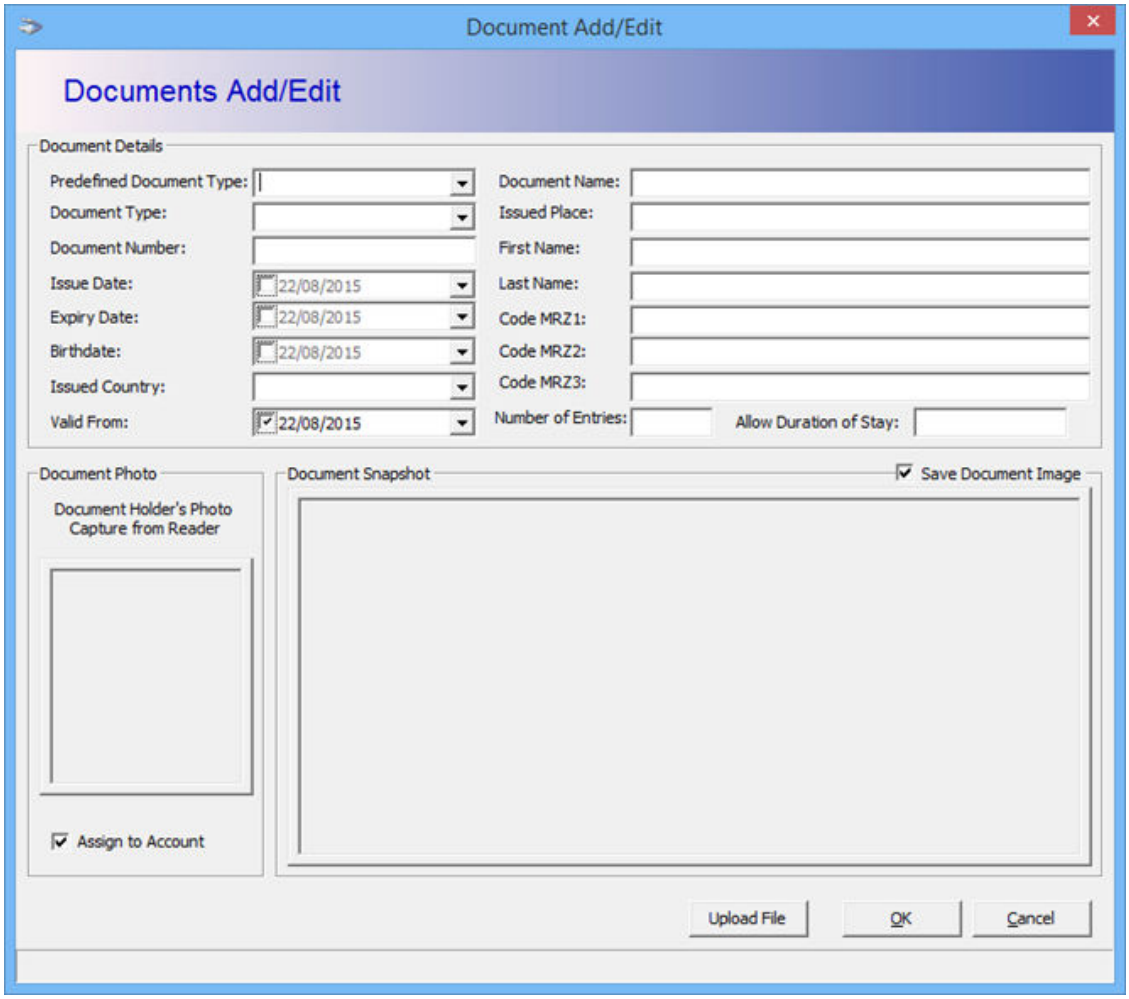
Table 7-23 (Cont.) Field Definition of Travel Documents

Field	Description
Document Expiry Date	Document expiry date.
Document Issue Country	Country document were issued.
Document Issue Place	Document issued place.
First Name	First Name.
Last Name	Last Name.
Birthdate	Crew Birthdate.
Code MRZ1	Machine Reader Track 1.
Code MRZ2	Machine Reader Track 3.
Code MRZ3	Machine Reader Track 3.
Number of Entries	Number of entries allowed.
Valid From	Validity of document.
Allow Duration of Stay	Allowed duration of stay on each visit.

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Adding / Editing a Travel Document

Figure 7-98 Travel Document Add/Edit Window



1. In the **Documents** tab, click **Add New** to open the Document Add/Edit form.
2. Select all applicable information from the list or manually enter the information.
3. Click **Upload File** to upload the picture or scanned document.
4. Click **OK** to save the travel document.
5. To edit, click **Edit**, update the relevant information, and click **OK** to save.

Revenue Analyzer Tab

The Revenue Analyzer provides you an analysis of the selected crew by date, department, and transaction number order. It comprises two tabs: **Department Details** and **Item Details**. By default, information displayed on the window is imploded and only the transaction date, net total and gross total appear. To view detailed information, select the **Expand All** checkbox or manually click the '**+/-**' key to show/hide the column. You can also click the **arrow down key** on the header to further expand the information in the respective column. This feature is also available in the Management, Guest Handling function.

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Figure 7-99 Revenue Analyzer Viewer Window

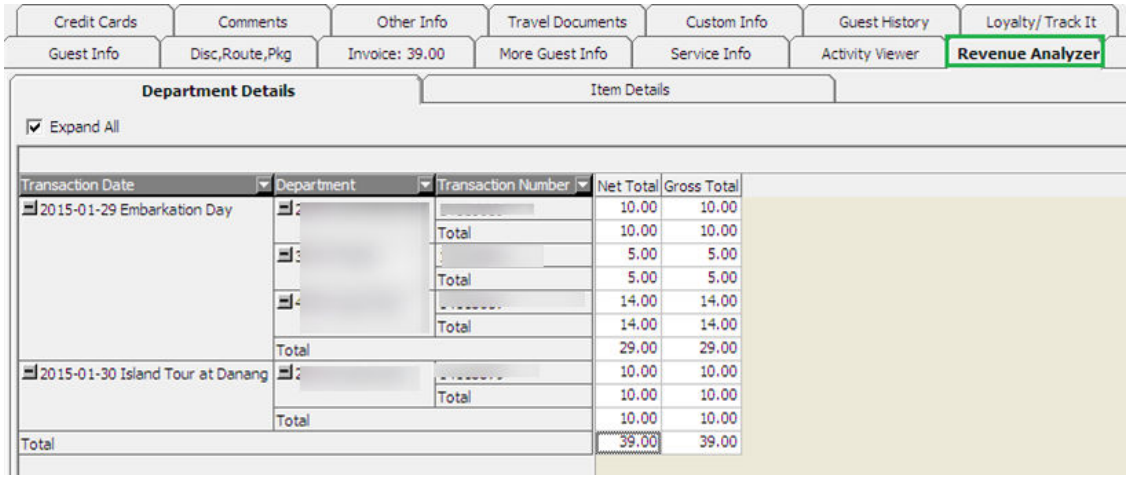


Table 7-24 Field Definition of Revenue Analyzer

Field	Description
Transaction Date	Date transaction posted.
Department	Financial Department.
Transaction Number	System generated transaction ID.
Total	Sub-total of each Financial Department.
Net Total	Total Net amount (Total value excluding discount).
Gross Total	Gross amount (Total value before discount).

Custom Info Tab

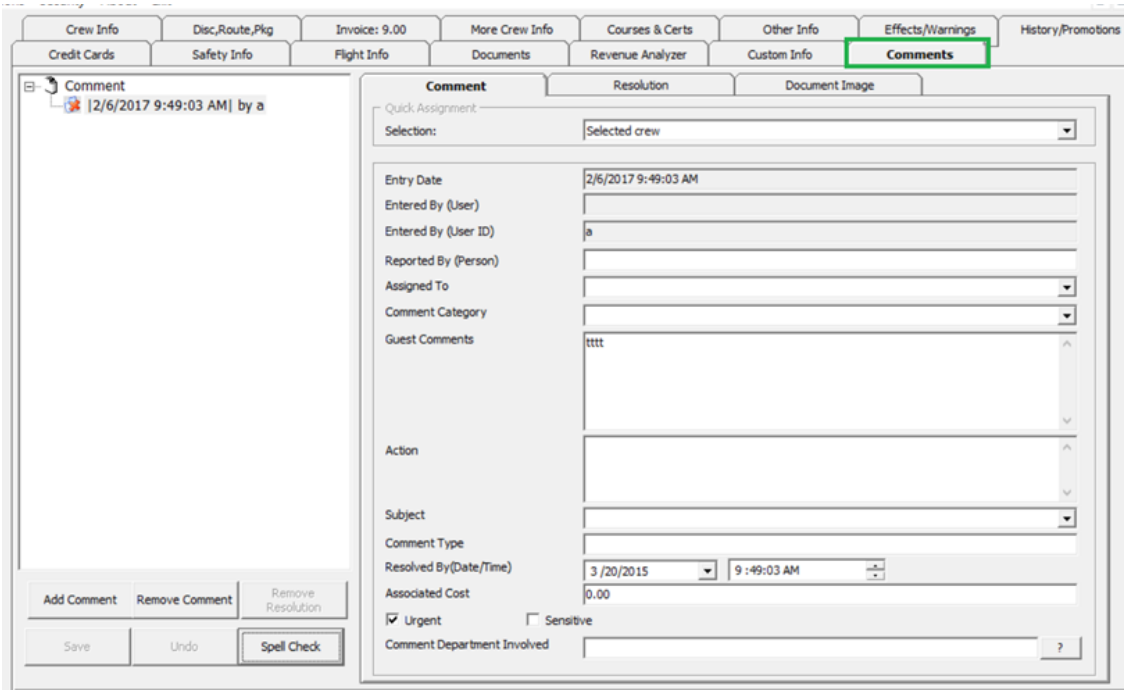
The Custom Info tab is a user definable fields that allows you to customize fields according to the operational requirements. The field names are defined in Administration, User Definable Field Setup.

Comments Tab

The Comments tab is designed to handle multiple follow-ups on feedback received. It can be on services rendered, facilities, cabin, and others. You can scan, attach an image file, and manually enter a comment.

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Figure 7-100 Comments Tab



Adding a Comment/Sub-comment

1. Click the **Add Comment**.
2. In the Comment tab, select the appropriate **fields** from the drop-down list.
3. Enter the **Reported By, Assigned To, Comment Category, Comment,** and **Associated Cost** and check the urgency and sensitivity, if any.
4. Click **Save** to save the record, which adds a **Red Cross indicator** on the Comment tab.
5. When you select a **Comment** and click the **Add Comment**, it creates a sub-comment with the **Comment Category** and **Comment Description** being defaulted to the main comment. The Comment Category and Comment Description are not editable.

Attaching Image File

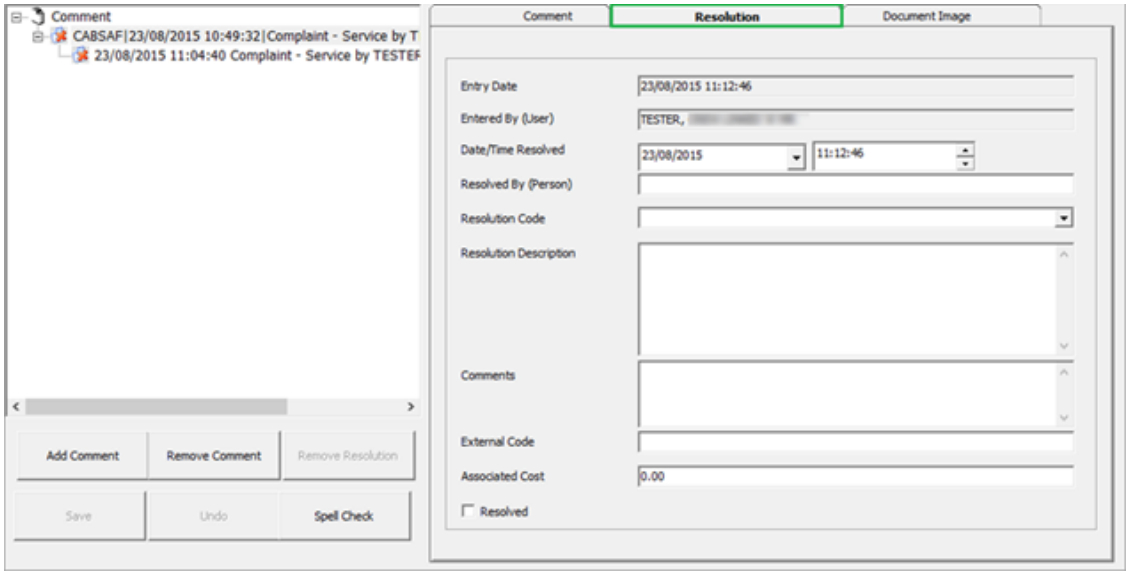
1. Select a **comment** and navigate to the Document Image tab.
2. Click **Scan Document** or **Upload File** if you are uploading an image from a storage location.
3. Click **Save** to save the image to the database.

Resolving a Comment

1. Select the **main comment** and navigate to **Resolution tab**.
2. Enter the **Resolved by (Person)** and **Resolution Description**, and select the **Resolved** checkbox.
3. Click **Save** to save the resolution and place a check mark next to the comment (s).
4. Select the **Resolved** checkbox to set all sub-comments as resolved.

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Figure 7-101 Comment Resolution Tab



Renew Reservation Function

1. Navigate to the Check Out tab in the Search Panel.
2. By default, the date is set to System Date in the Search Panel. Change the date to the passenger checked-put date.
3. Enter the crew's **Last Name** or use the alphabets tab to search for the last name. Select the **ALL** tab to list all passengers departed on the date specified.
4. Click the **Re-New Reservation** located in the Crew Handling window.
5. At the New Crew Reservation prompt, select **Yes** to renew the reservation.
6. Click **Edit Information** to change the expected arrival date and any other required information.

Check In Function

Crew joining the cruise are expected to checked-in to the system prior to boarding, and these reservations are categorized under the Expected tab.

1. Retrieve the reservation from the Search Panel, **Expected** tab and click **Check In**.
2. At the Check In prompt, select **Yes** to check in the reservation and print the key card at the same time.

Check Out Function

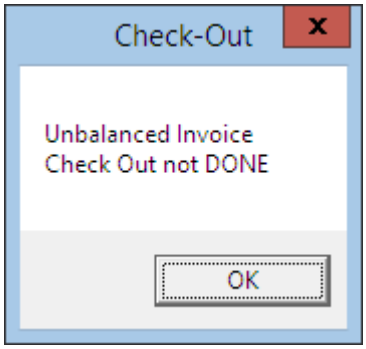
At the end of the voyage, all crew accounts must be checked-out from the system. This is to ensure all accounts are in balance before performing a System Cruise Change.

To check out a crew,

1. Retrieve the reservation from the Search Panel, Check In tab and click **Check Out**.
2. At the Check Out prompt, select **Yes** to check out the reservation.
3. If the account is unbalanced, you will be prompted to settle the invoice before proceeding. Click **OK** to return to the crew account.

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Figure 7-102 Unbalanced Invoice



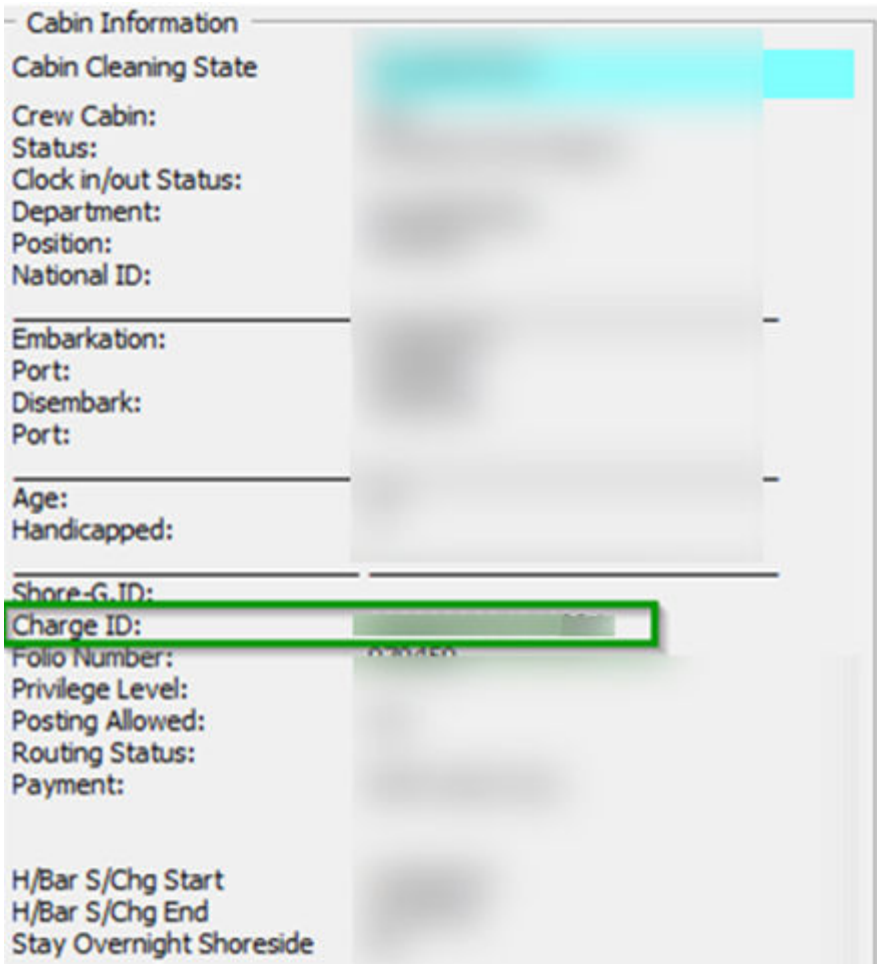
See *Pay Invoice* section for steps on how to settle an account.

Print Board Card Function

The Print Board Card function enables you to print a copy of the crew board card, if they are not printed earlier. These cards are printable from the Crew Handling window.

1. Retrieve the reservation from the Search Panel and click the **Print Board Card**.

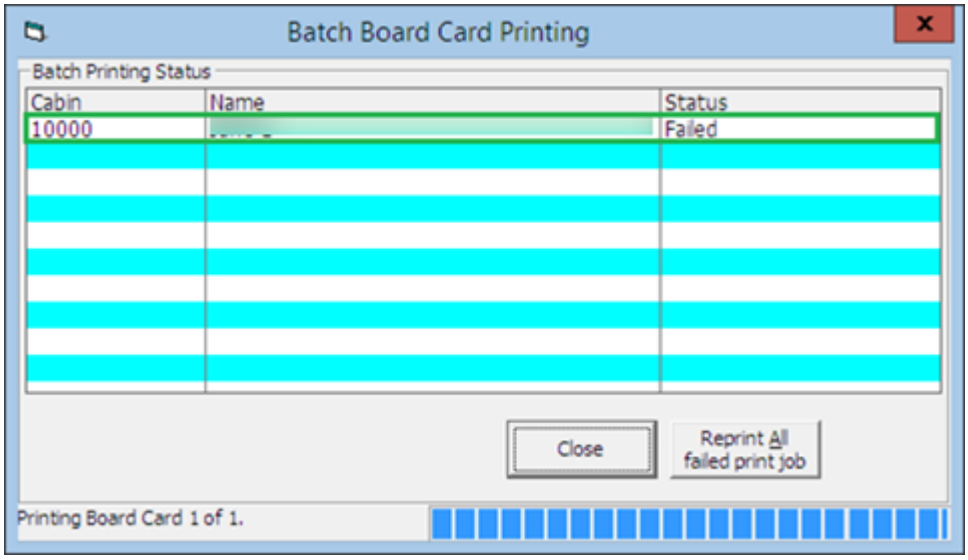
Figure 7-103 Board Card Number in Crew Info Tab



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2. The process increases the Board Card number shown in the Crew Info tab, and the last digit of the board card denotes the number of times the board card was re-printed. The first printed card always ends with zero.
3. The Status of the printed card is reflected in the Batch Board Card Printing window. If the card status is failed, clicking the **Reprint All failed print job** will reprint it.

Figure 7-104 Batch Board Card Printing



4. If the board card fails to print, check the Interface or Printer connectivity.

Resetting a Board Card

If a board card is lost, a change of lock combination for the cabin is necessary. This process assigns a new board card number to **all** occupants of the same cabin.

1. Retrieve the reservation from Search panel and click the **Reset Board Card**.
2. At the Reset Board Card prompt, select **Yes** at the Recreate Cards prompt.

> **Warning**
>
> This process invalidates all previously issued cards.

3. At the **Batch Board Card Printing** prompt, click **Close** if the card is printed successfully. Otherwise, repeat the above process.

Board Card

The Board Card function enables you to print board cards by batch, based on the criteria set in a template.

See *Advanced Board Card Printing User Guide.pdf* for details about setup and printing.

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Safety

Every crew member on board is assigned with specific Emergency roles. You can define them in the Safety management function within the Safety tab. The defined emergency roles can be a standard when assigning emergency functions across the fleet, based on the crew accreditation.

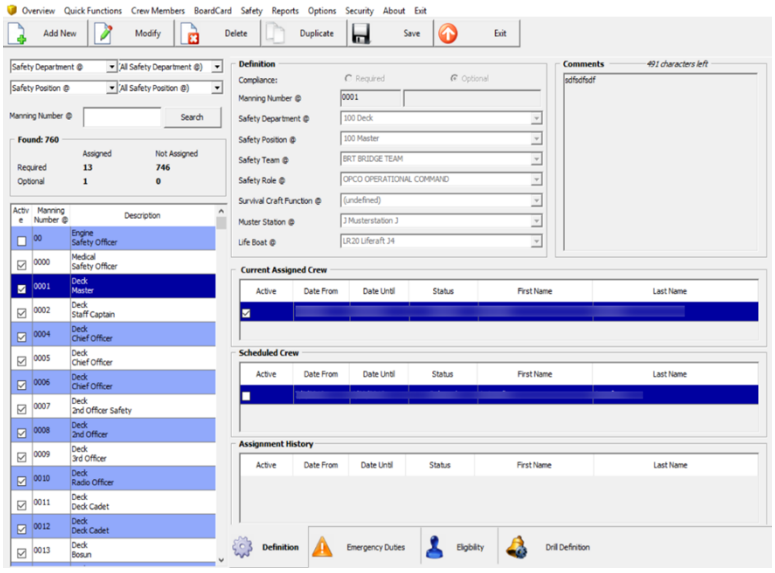
Muster List Setup

The Muster List setup is a representation of the Ship's emergency stations. The information entered here requires a crew entry and will become the foundation for future safety reporting purpose. The Safety Manager or Safety Coordinator is responsible in setting up and updating this information.

This function is controlled by the **Safety, Advance Safety Drill** (0= Standard / 1= Advance Safety Drill) parameter. The Muster List Setup for Standard Safety Drill Mode is described below.

Configuring Standard Muster List Setup

Figure 7-105 Standard Muster List Setup



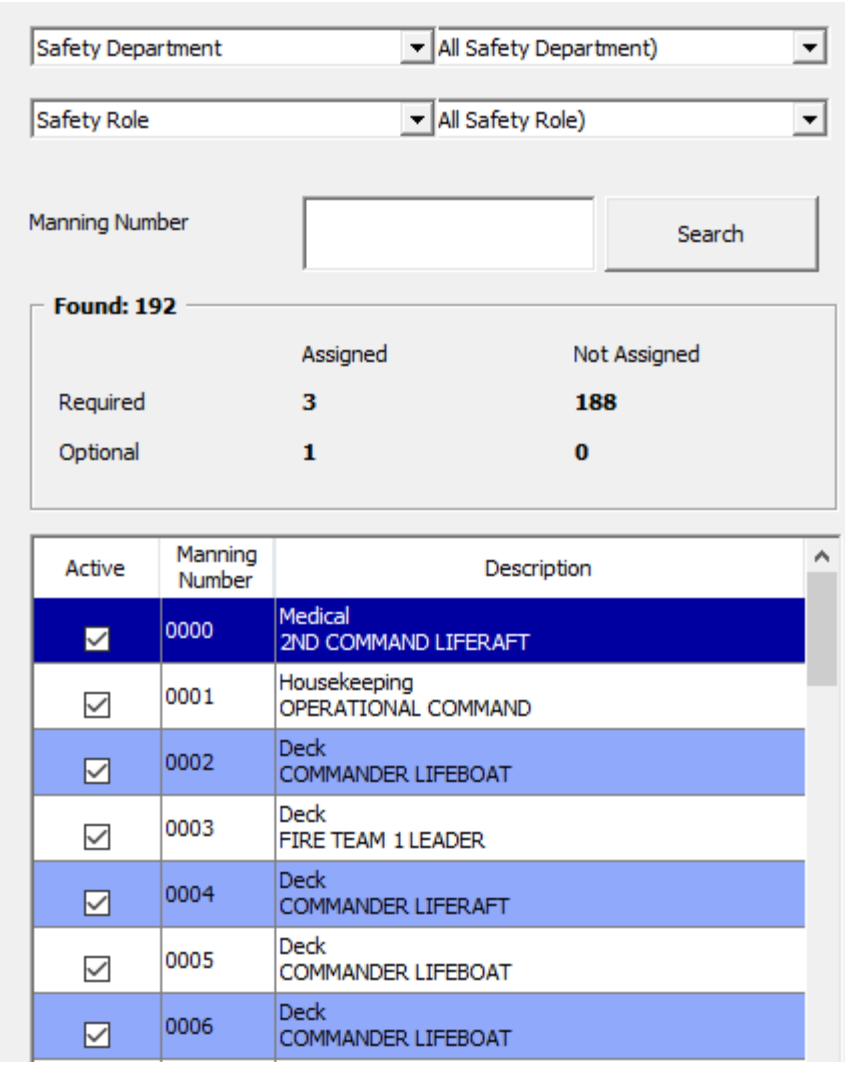
The Standard Muster List Setup mode comprises four main tabs: Definition, Emergency Duties, Eligibility and Drill Definition. Each of these tab defines the Safety task to be carried out during emergency, required accreditation, and the drill courses.

Search Panel

The information displayed in the Muster List Setup is managed using the filter selection of the Search Panel, for example, filter by Safety Department, Safety Group, Muster Station, Safety Position, In Port Manning (IPM group), Emergency Function, Life Boat, or Life Raft.

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Figure 7-106 Muster List Setup Search Panel



In the Summary Section:

- You can see the total number of Required/Optional Safety Numbers Assigned/Unassgined
- Active Safety Numbers has a check mark in the Active column.

Definition Tab

The Definition section defines the safety number associated to the safety information.

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Figure 7-107 Definition Tab

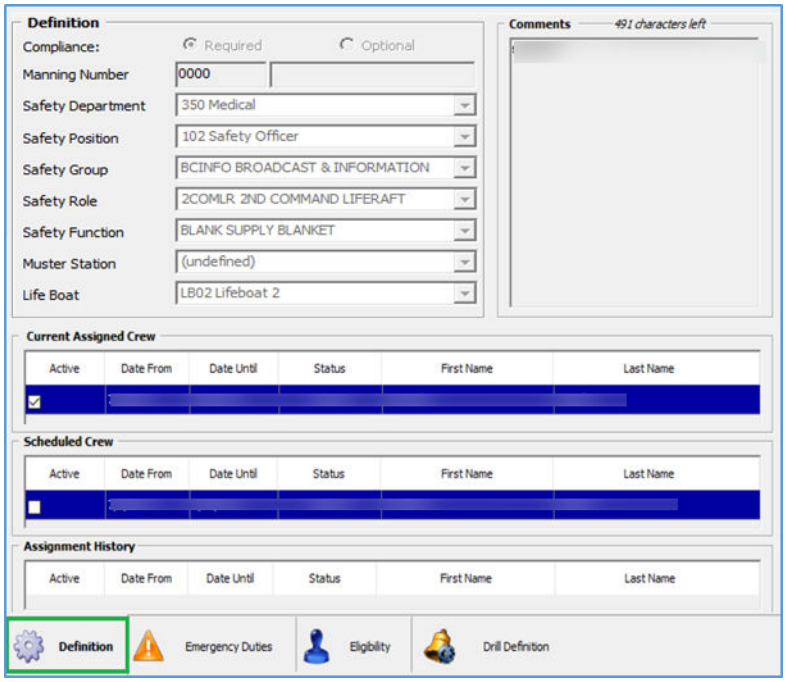


Table 7-25 Drill Definition Tab

Field	Description
Compliance	Safety Number flag – Required or Optional.
Manning Number	A unique Safety Number that identifies the Emergency Function. Field is compulsory and alphanumeric.
Safety Department	Crew Safety Department related to Emergency Function. Field is compulsory and reference to setup in Administration, Safety Setup, and Safety Department.
Safety Position	Defines the Safety Position in emergency, and is a compulsory field.
Safety Group	Grouping of related safety functions. Reference to Administration, Safety Setup, Safety Group.
Safety Role	Crew Safety Role. Reference to Administration, Safety Setup, Safety Role.
Safety Function	Function define in Survival Craft. Reference to Administration, Safety Setup, Survival Craft Function.
Muster Station	Muster Station assigned to the Safety Number. Reference to Administration, Safety Setup, Muster Station.
Life Boat	Life Board assigned to a specific emergency function. Reference to Administration, Safety Setup, Life Boat.
Current Assigned Crew	Crew currently assigned to the Safety Number.
Scheduled Crew	Crew scheduled to the Safety Number.

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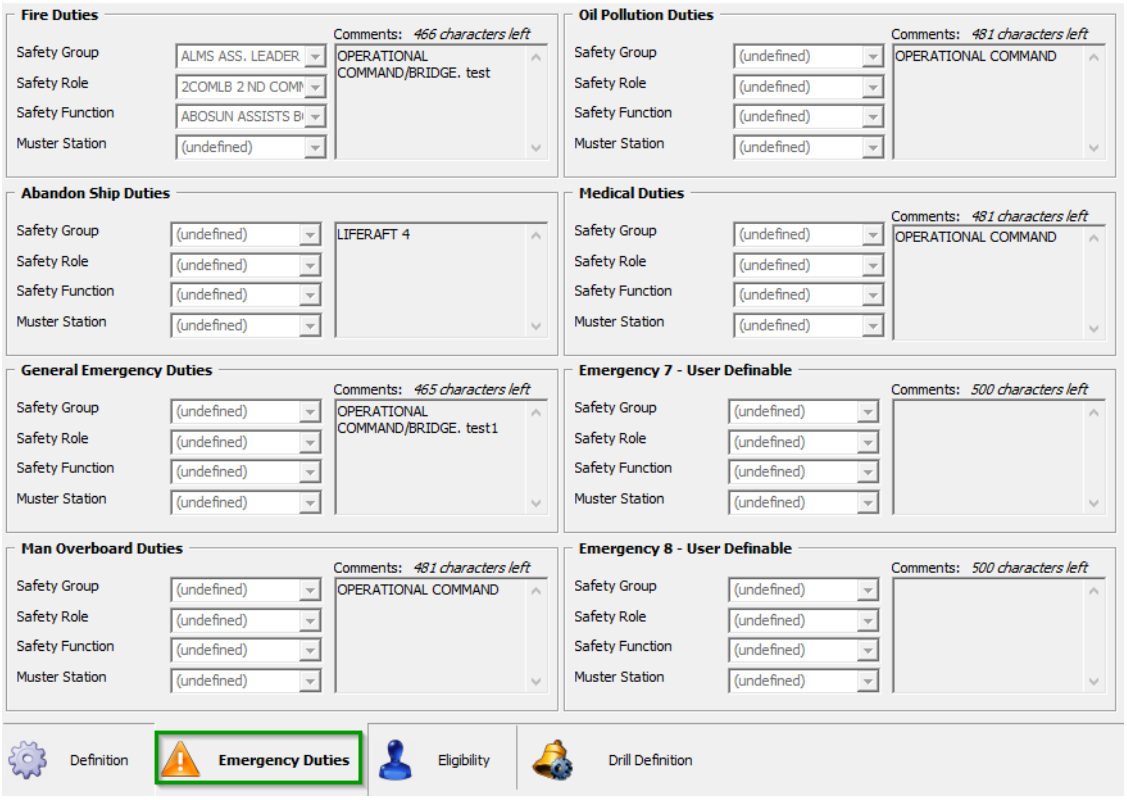
Table 7-25 (Cont.) Drill Definition Tab

Field	Description
Assignment History	Past records of crew assigned to the Safety Number.
Comments	Additional comments pertaining to the Safety Number.

Emergency Duties Tab

The Emergency Duties to be carried out by crew that are assigned to the Safety Number are defined in this tab. The headings of the Emergency Type are set up in **Administration, System Setup, Label Setup** under **SFTEM** group.

Figure 7-108 Emergency Duties Tab



Eligibility Tab

In the Eligibility tab, the required Operational Position courses and certifications are defined in accordance to SOLAS regulation and the Ship's safety rules.

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Figure 7-109 Eligibility tab

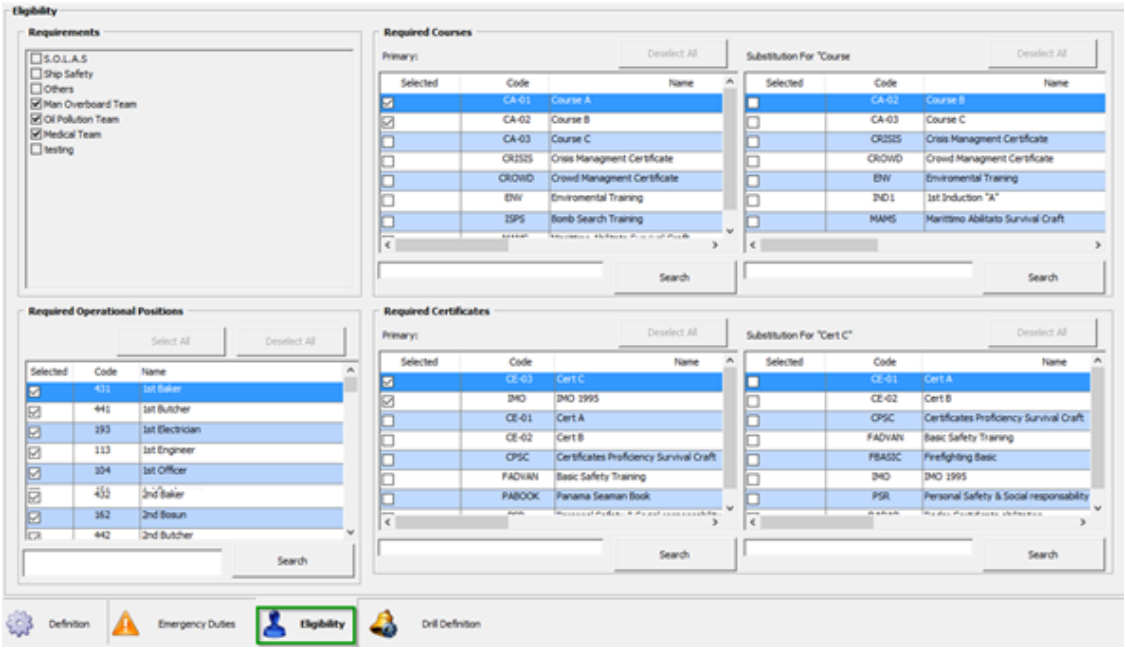


Table 7-26 Eligibility tab Field Definition

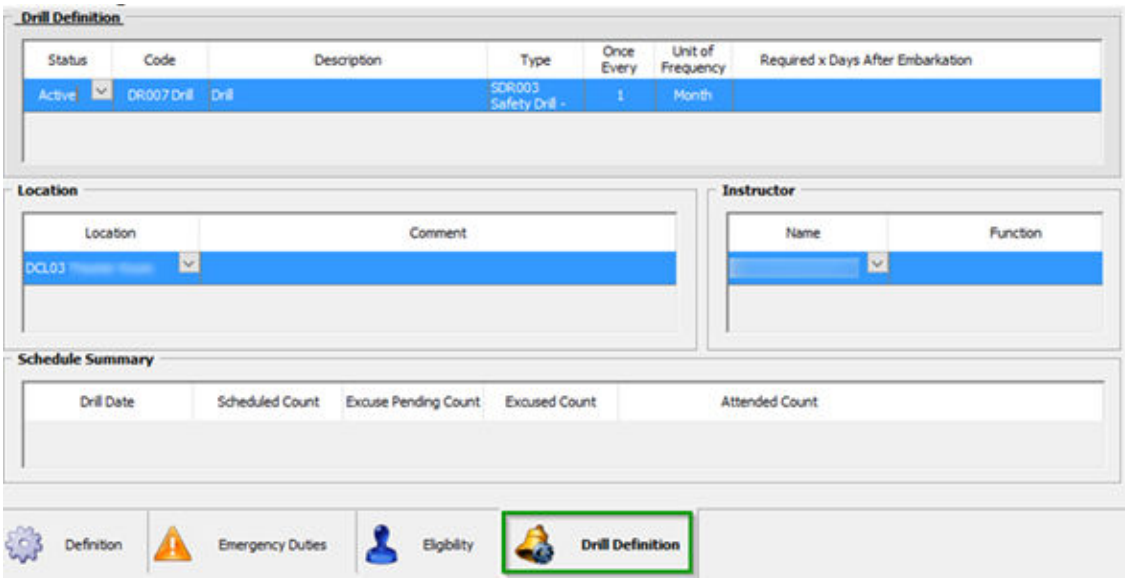
Field	Description
Requirements	Reference to governing authority's requirements for selected position to be onboard at all times.
Required Courses	Courses required to be completed by Crew that either are attached to this Safety number, the selected primary course or substitute course.
Required Operational Positions	Operational Positions requires in the Safety Number.
Required Certificates	Mandatory Certification held by crew who are assigned to the Safety Number.

Drill Definition Tab

The Drill Definition tab is a view only window and it displays information of drills assigned in Safety Drill module. See the *Safety Drill User Guide* for more information on drill setup.

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Figure 7-110 Drill Definition Tab



Adding Manning Number

1. At the Muster List Setup window, click **Add New**.
2. Enter all of the required fields in the Definition tab using the drop-down list.
3. Navigate to the Emergency Duties tab and define the type of duties for the Safety Number by selecting the Safety Group, Safety Role, Safety Role, Safety Function and Muster Station from the drop-down list.
4. Navigate to the Eligibility tab and select the mandatory requirements, courses/certification and Operational Position by selecting the respective checkboxes.
5. Click **Save** to save the Safety Number.

Duplicating Manning Number

You can duplicate a Safety Number when the majority of the information is the same.

To copy the Safety Number:

1. Select the **Safety Number** from the Search Panel and click **Duplicate**.
2. Update the necessary information and click **Save** to save the record.

Deleting Manning Number

You can delete a Safety Number that is not in use, simply by selecting the Safety Number and clicking **Delete**.

Configuring Advance Muster List Setup

The Advance Muster List Setup has fewer tabs than the Standard Muster List Setup. It comprises two main tabs, which are Definition and Eligibility.

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Definition Tab

In the Definition section, you can define the safety number associated to the safety information. It has additional fields compared to the Standard Muster List setup.

Figure 7-111 Muster List Setup Definition Tab

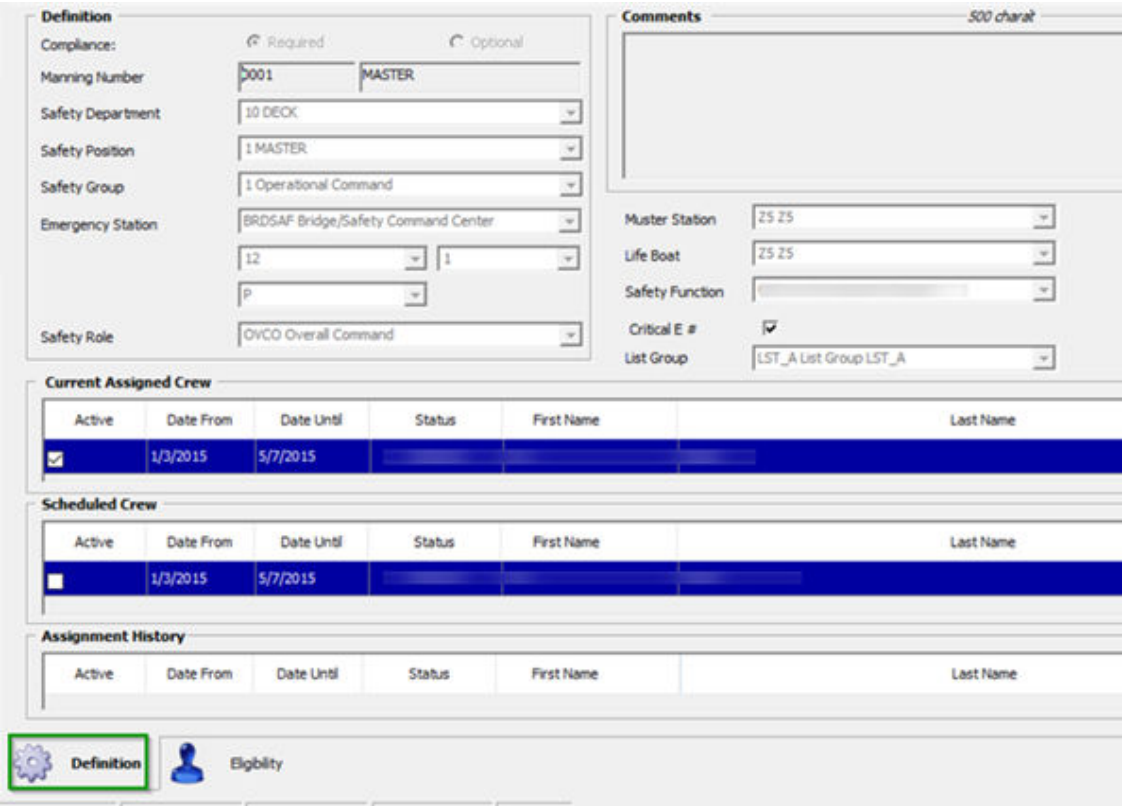


Table 7-27 Muster List Setup Field Definition

Field	Description
Compliance	Safety Number flag – Required or Optional.
Manning Number	A unique Safety Number that identifies the Emergency Function. Field is compulsory and alphanumeric.
Safety Department	Crew Safety Department related to Emergency Function. Field is compulsory and reference to setup in Administration, Safety Setup, Safety Department.
Safety Position	Define the Safety Position in emergency, and is a compulsory field.
Safety Group	Grouping of related Emergency function, and is a compulsory field.
Emergency Station	A station assigned to the Safety Number. Reference to setup in Administration, Safety Setup, Muster Station.

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Table 7-27 (Cont.) Muster List Setup Field Definition

Field	Description
Safety Role	Crew Safety Role. Reference to Administration, Safety Setup, Safety Role.
Muster Station	Muster Station assigned to the Safety Number. Reference to Administration, Safety Setup, Muster Station.
Life Boat	Life Board assigned to a specific emergency function. Reference to Administration, Safety Setup, Life Boat.
Safety Function	Function define in Survival Craft. Reference to Administration, Safety Setup, Survival Craft Function.
Critical E#	An indicator flag if the Safety Number is a critical Emergency Number.

Eligibility Tab

The information contained in this tab is similar to the Eligibility tab in Standard Muster List Setup.

To set up the Advance Muster List Setup, see steps in the Adding Manning Number section.

Muster List Assignment

The Muster List Assignment function is where you assign a specific Safety Number to crew members onboard or expected to arrive.

This function is the second option from the Safety menu, and the assignment is done by either Function or Person. The behavior of the Muster List Assignment is dependent on the **Safety, Allow Multiple Safety Number Assignment** parameter.

All records in the Muster List are active assignments that you commit after changes haves been made. The system checks and ensures only qualified onboard crew members are assigned to the specific Safety Number /Function, based on crew's qualifications and the Muster List Setup.

Standard Muster List Assignment

Active Muster List Assignment — Standard

The Muster List Assignment has two functions that are an assignment by function or person. Although the information on these tab is different, they yield the same results.

The Assign by Function tab has two sections:

- Muster List and Eligible Crew.
- Assign by Person, which consists of the Crew List and Eligible Function.

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Figure 7-112 Standard Muster List Assignment

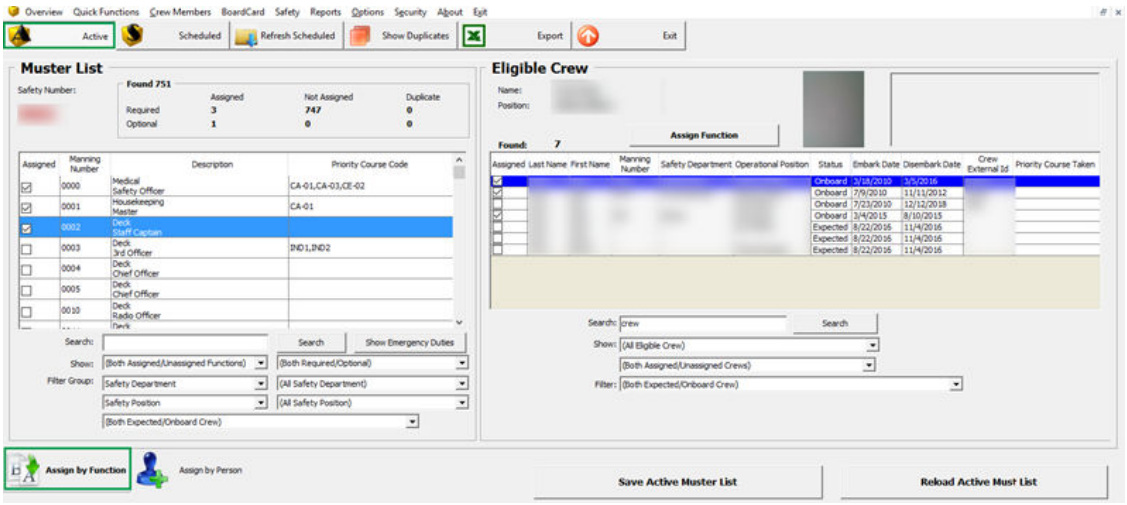
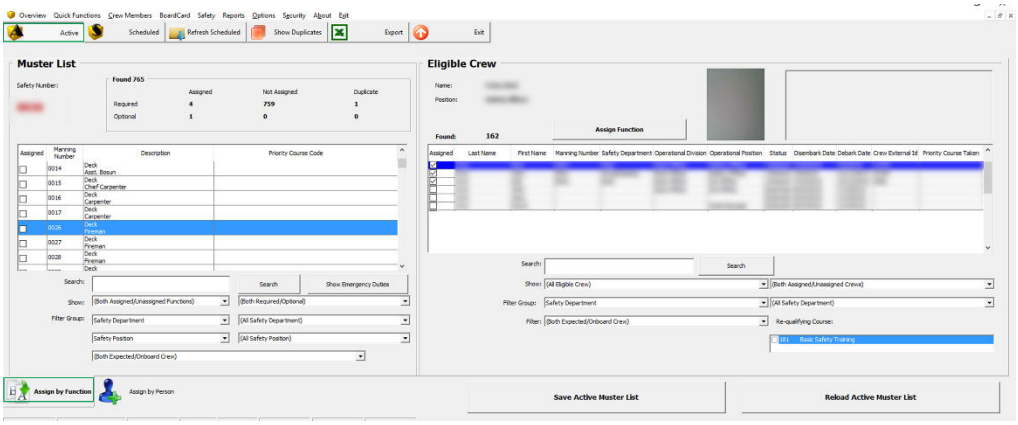


Figure 7-113 Advance Muster list Assignment by Function



In the Assign by Function tab, you will see a summary of assigned/not-assigned count, with a list of all Safety Numbers associated to a position of the Muster Station underneath it.

In the Eligible Crew section, lists of crew matching the eligibility criteria and to be assigned to the Safety Number is shown. A list of courses taken is shown in the grid if this is defined in the **Safety, Display Valid Courses on Muster List Assignment** parameter.

You are allow to save or reload the Active Muster List in both tabs.

- **Save Active Muster List:** Saves all current safety number assignments as backup in a text file format.
- **Reload Active Muster List:** Allow restoration of backed up safety number assignments based on the saved muster list file. You can use this function to undo all the changes after activating the Schedule Muster List.

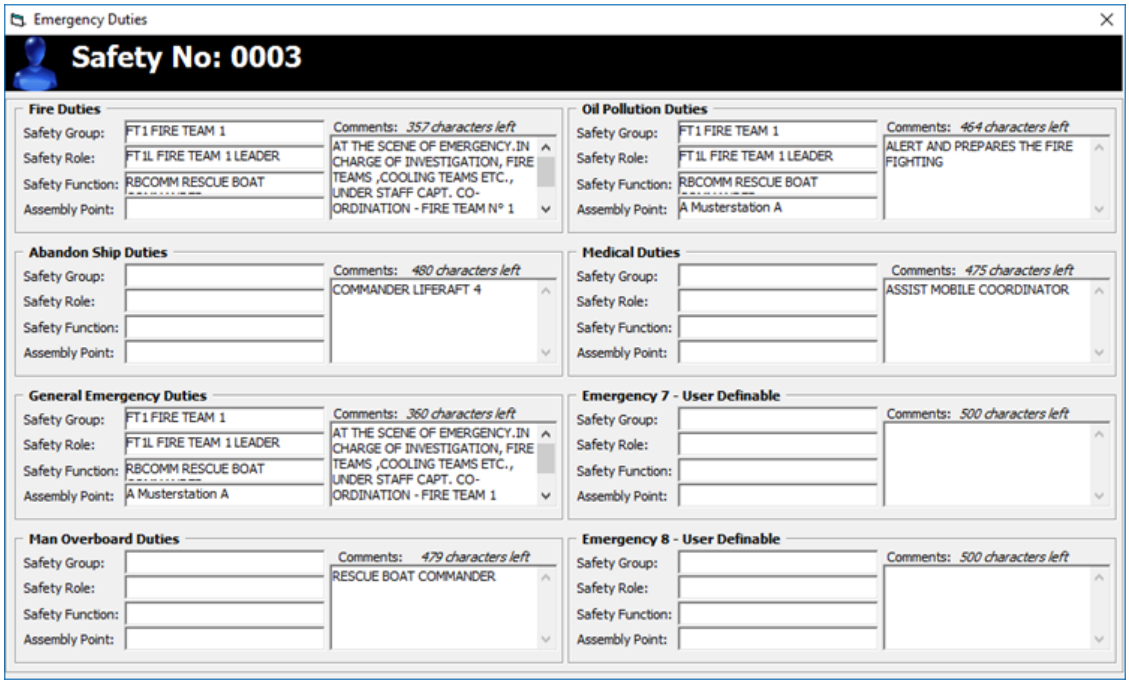
Assigning Safety Number by Function

1. In the Muster List Assignment window, click **Active and Assign by Function**.

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2. Select the criteria from the drop-down list.
3. To view more information about the selected Safety Number, click the **Show Emergency Duties**.

Figure 7-114 Emergency Duties Information



1. Navigate to the Eligible Crew section and further filter the information to display.
2. Double-click the Crew name to view the Crew Eligibility Status and course history.
3. Select the **Crew name** and then click **Assign Function**. You can assign only crew members with on-board status.
4. In the confirmation prompt, click **Yes** to proceed, which places a check mark on the **Assigned** column, or click **No** to return to the previous window.

Assigning Safety Number by Person

In the Assign by Person tab, crew on-board/expected are listed.

The Eligible Function section displays crew members who match the eligibility function to the Safety Number, including the courses taken if they are defined in the **Safety, Display Valid Courses on Muster list Assignment** parameter.

Assigned functions display a check mark. Information on the grid may vary depending on the black filter selection.

Assigning Safety Number

1. In the Muster List Assignment window, click **Active and Assign by Person**.
2. Select the criteria from the drop-down list.
3. To view more information about the selected Safety Number, click the **Show Emergency Duties**.

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4. Select the crew name and click **Assign Function** in the Eligible Function section.
5. If the Safety Number is assigned, the system prompts and override confirmation. Select **Yes** to reassign the Safety Number to the selected crew.

Un-assigning Safety Number by Function

1. Select the crew you wish to un-assign and click the **Unassign Function**.
2. At the confirmation prompt, click **Yes** to proceed.

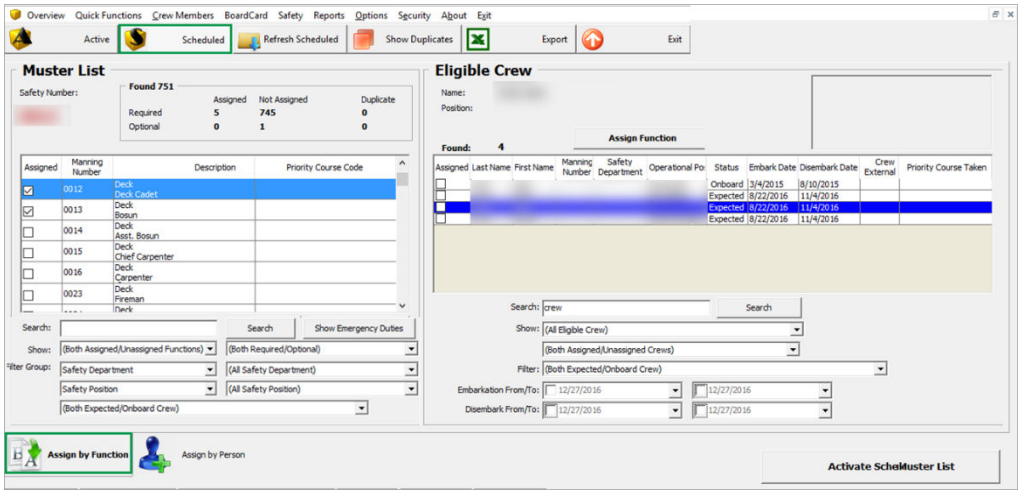
Scheduled Muster List Assignment - Standard

This function allows Safety Officers to plan ahead and assign a safety number in advance, allowing the arriving crew to replace crew members due to disembark.

In the Scheduled tab, the system checks and ensures only qualified Onboard and Expected crew members are assigned to the specific emergency functions.

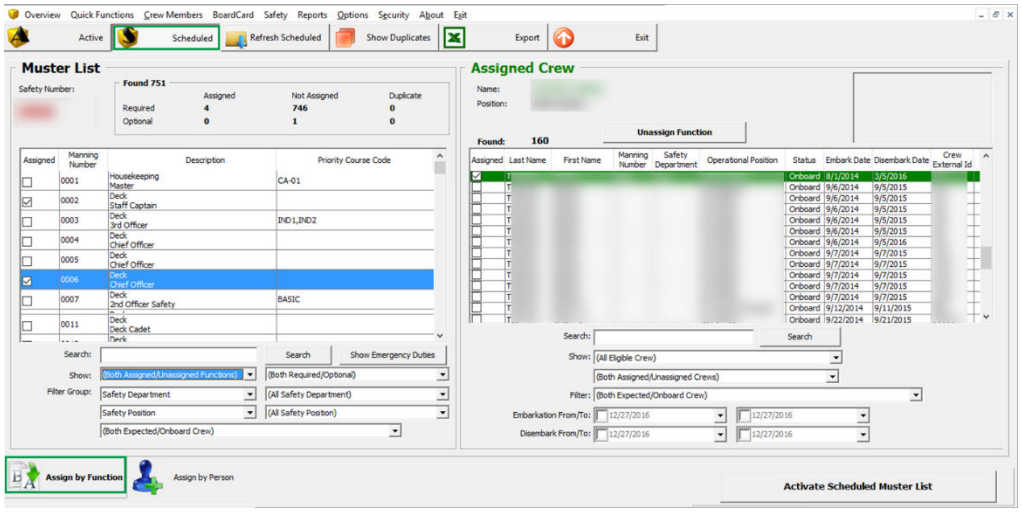
The assignment of Safety number per crew or by onboard/expected is managed by the **Safety, Allow Safety No Assignment to Onboard or Expected** parameter. See *Appendix — Parameter* section for further details.

Figure 7-115 Standard Schedule Muster List — Assign by Function



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Figure 7-116 Advance Schedule Muster List — Assign by Function



The information displayed in the Assign by Function tab is similar to Active Muster List and has an additional filter by **Embarkation From/To** and **Disembark From/To** in the Eligibility section.

Scheduling Safety Number by Function

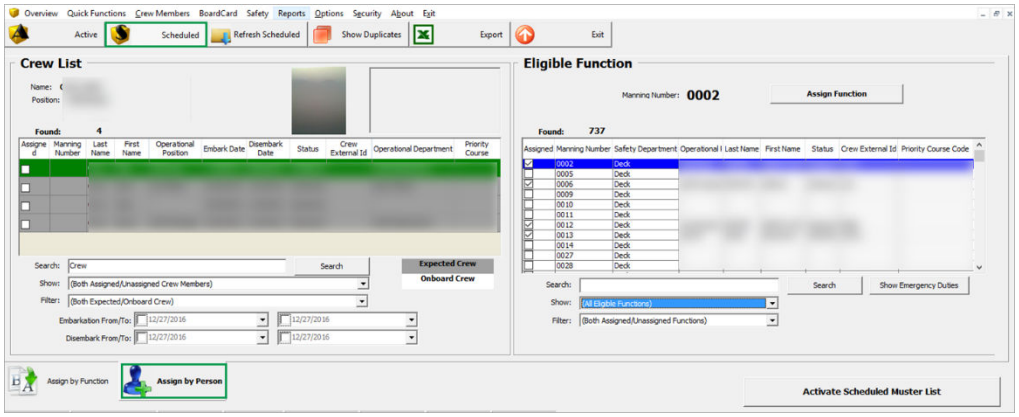
1. In the Muster List Assignment window, click **Schedule**.
2. Select the criteria from the drop-down list.
3. To view more information about the selected Safety Number, click the **Show Emergency Duties**.
4. Navigate to the Eligible Crew section and further filter the information to display.
5. Double-click the crew name to view the Crew Eligibility Status and course history.
6. Select the **crew name** and click **Assign Function**.
7. At the confirmation prompt, click **Yes** to proceed. This places a check mark on the Assigned column or **No** to return to the previous window.

Un-assigning Safety Number by Person

1. Select the **crew** you want to un-assign and click **Unassign Function**.
2. At the confirmation prompt, click **Yes** to proceed.

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Figure 7-117 Schedule Muster List Assignment by Person



The function in Assign by Person is the same as Assign by Function, with an added functionality to customize the grid display color scheme for crew onboard or expected.

Scheduling Safety Number

1. In the Muster List Assignment window, click **Schedule**.
2. Select the criteria from the drop-down list.
3. To view more information about the selected Safety Number, click the **Show Emergency Duties** in the Eligible Function section.
4. Select the **crew name** and click **Assign Function** in the Eligible Function section.
5. If the Safety Number is assigned, the system prompts an overriding confirmation. Selecting **Yes** reassigns the Safety Number to the selected crew.

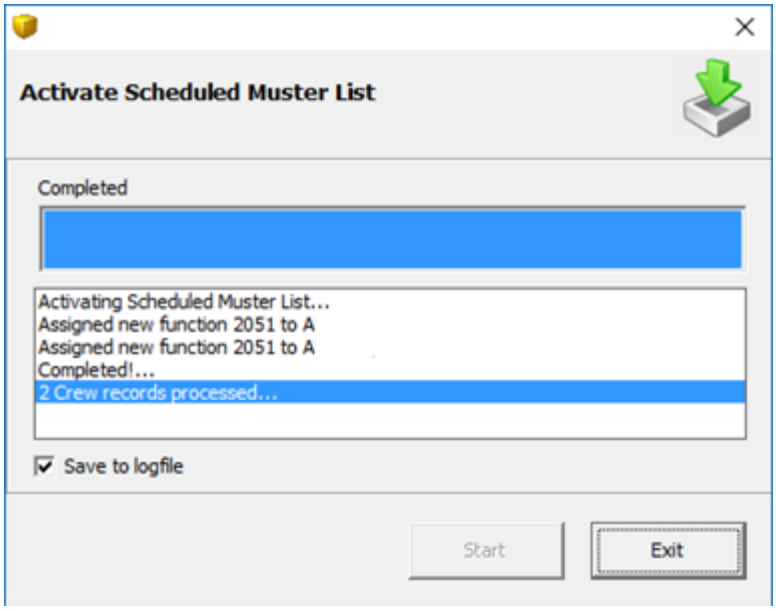
Activating Muster List

In the scheduling mode, the Activate Scheduled Muster List activates all of the changes made to the Safety Number/Functions assignment. Once this is activated and committed, you will see the changes in the Active Muster List.

1. Under the Eligible Crew section in Schedule Muster List, click **Activate Scheduled Muster List**.

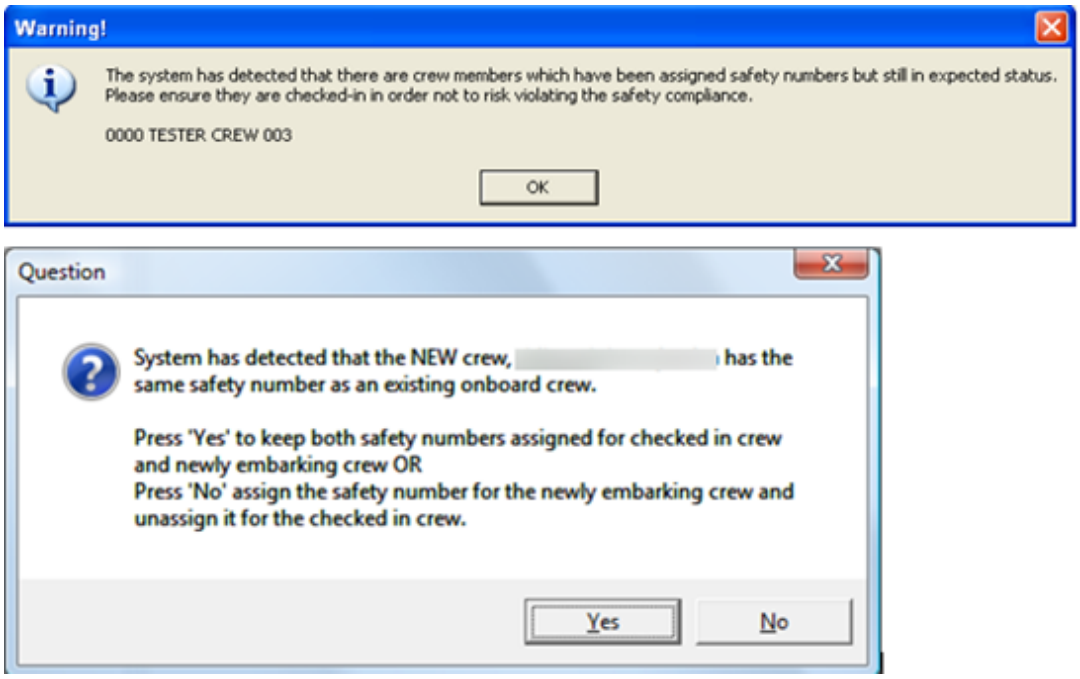
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Figure 7-118 Activate Schedule Muster List



2. In the Activate Scheduled Muster List dialog window, check the **Save to logfile** if you wish to save the process into a log.
3. Click **Start** in the dialog window and select **Yes** at the confirmation prompt.
4. The number of records processed appear on the status bar.
5. During this process, the system checks and prompts a warning if discrepancies are found, for example, the status of the assigned crew is still in Expected status or a new crew has the same safety number as an existing crew onboard.

Figure 7-119 Crew Safety Number



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6. Click **Exit** once the process status shows Completed. The log file is saved in the Oracle Hospitality Cruise program folder.

> **Note**
>
> The system can automate the Safety Number assignment without prompting a dialog box based on values defined in the **General, Duplicate Safety Number Action** parameter. See *Appendix — Parameter* for more information.

Refresh Scheduled

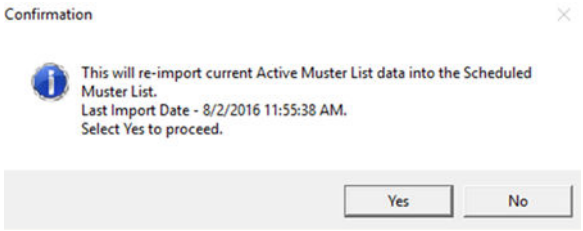
The Refresh Schedule functionality imports the previously saved Activate Schedule Muster List into the current Schedule muster list. For emergency assignment prior to the embarkation date, the Safety Officers must compile the current crew manifest and import it into the Schedule.

Re-importing the current crew manifest allows the Safety Officer to determine the status of newly embarked crew and those scheduled to disembark, and ensures the Muster List has the current data and assignments.

Refreshing a Schedule

1. Click **Refresh Schedule** at the ribbon bar.
2. Take note of the last import date at the confirmation prompt before proceeding. Once you proceed, the system refreshes and overrides any unsaved Scheduled Muster List with the Active Muster List.

Figure 7-120 Confirmation of Re-Import



Show Duplicate

The system permits only one (1) Emergency Function per crew member, with the exception in the Scheduled Muster List where the same function assignment to an Expected Crew Member and Onboard Crew member is allowed. You can use this function to show all duplicate assignments and make corrections where necessary.

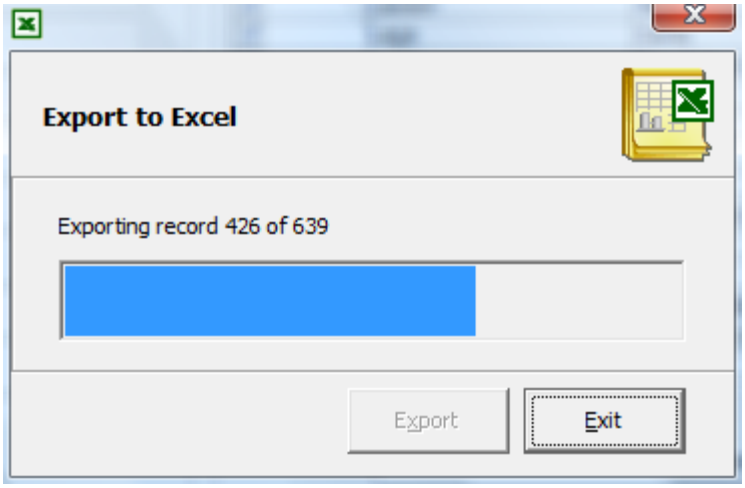
Depending on the selected tabs – Active or Scheduled and when you click the Show Duplicate, the system prompts a list of duplicate Emergency Function assignments. The Safety Officer is required to re-assigned the Emergency Function to a unique crew member, if any.

Export

1. In the Muster List Assignment window, click **Export** to export all the data.

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Figure 7-121 Export to Excel

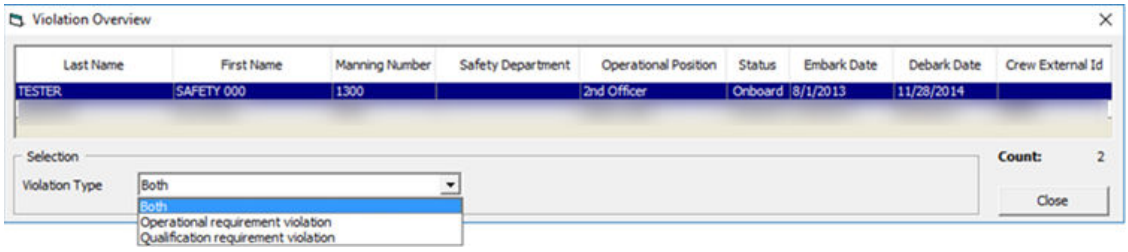


2. The system launches the Microsoft Excel application and transposes the information on a spreadsheet when the export completes.
3. Save the file to your chosen location.
4. Click **Exit** to return to the Muster list Assignment window.

Violation Overview

It is mandatory for crew to complete certain courses/certificates related to their safety number but not all are on the eligible operational position list, or vice versa. In the Violation Overview window, you can filter and view the violation, if any. You must have access right *#4655 — Access to Violation Overview* granted in order to access this function.

Figure 7-122 Safety Violation Overview



You can select only one of the following violations from the drop-down list:

1. **Operational Requirement Violation:** Crew with Safety number assigned but Operational Position not linked to an assigned Safety Number.
2. **Qualification Requirement Violation:** Crew with Safety number assigned but does not fulfil the primary/substitution course and certificate required for that safety number.
3. **Both:** Crew that violates both of the above requirements.

To view the violation, select **Violation Type** from the drop-down list.

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In Port Manning

The In Port Manning (IPM) is a special function that enables the Safety Officer to assign and schedule crew duty while the ship is docked in port. This function is enabled by the **Safety, Allow to use a special In Port Manning handling = 1** parameter.
The following setup must be in place before you use this function Configure the setup in Administration, Safety Setup and System Setup. See *Administration Chapter, Safety Setup*.

- IPM Group or otherwise known as Safety Group
- Safety Roles
- Safety Department
- In Port Occurrence
- IPM Parameter

IPM Port Occurrence

The IPM Port Occurrence distinguishes the Safety Occurrence of some IPM duties or functions that could be different when the ship docked at different types of ports. For example,

- **At Port:** Ship is docked alongside the port.
- **Tender:** Ship is docked at Tender Port.
- **Undefined:** Ship is at Sea Day.

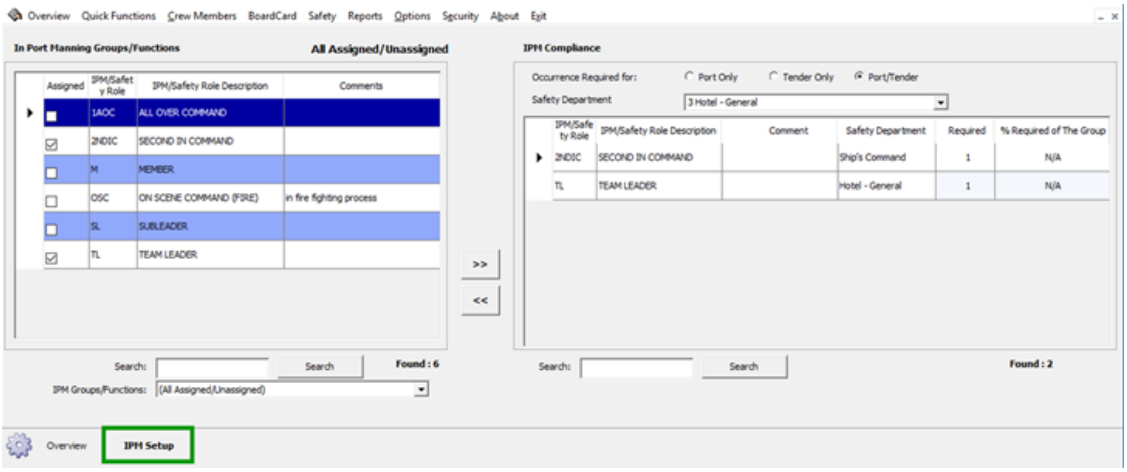
The occurrence is linked to System Cruise in Administration, System Cruise Setup. IPM Port Type.

In Port Manning Setup

The IPM Setup consists of two tabs: an Overview and the IPM Setup. Multiple IPM Group can be set up with safety functions defined on each one. In each of the IPM's, only one Safety Department can be assigned and is based on the IPM Port Occurrence.

Assigning IPM Group

Figure 7-123 IPM Setup



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Table 7-28 Field Description of IPM Setup Window

Field	Description
IPM Groups/Functions	List of available IPM Groups.
Assigned	Indication of IPM Group currently assigned if checkbox is ticked.
IPM/Safety Role	Defines the Safety Department the IPM Group belongs to.
Occurrence Required	Occurrence based on selected port and IPM Group. Port Only: Belongs to specific Safety Department Occurrence at Port. Tender Only: Belongs to specific Safety Department Occurrence at Tender Port. Port/Tender: IPM Group applicable to both type of port.
Required	Define the number of required crew member(s) to remain onboard to perform the safety function and this may be overwritten. This value takes precedence if no value is define in % Required of The Group.
% Required of The Group	Define the minimum number of crew onboard by percentage. If the number of crew in the group changes, the required crew onboard changes automatically based on the percentage specified. For example, a safety group with 20 crew members and percentage is set to 50%, the required crew is 10.

1. From the Safety Menu, select **In Port Manning Setup** from the drop-down list.
2. Navigate to the **IPM Setup** tab and select the **Occurrence Required** and **Safety Department**.
3. Select the **In Port Manning Groups/Functions** and click the **right arrow**.
4. In the Required or % Required of the Group Field, enter the desire value.
5. Use the Search function to search for the IPM Group. The search field is case sensitive.

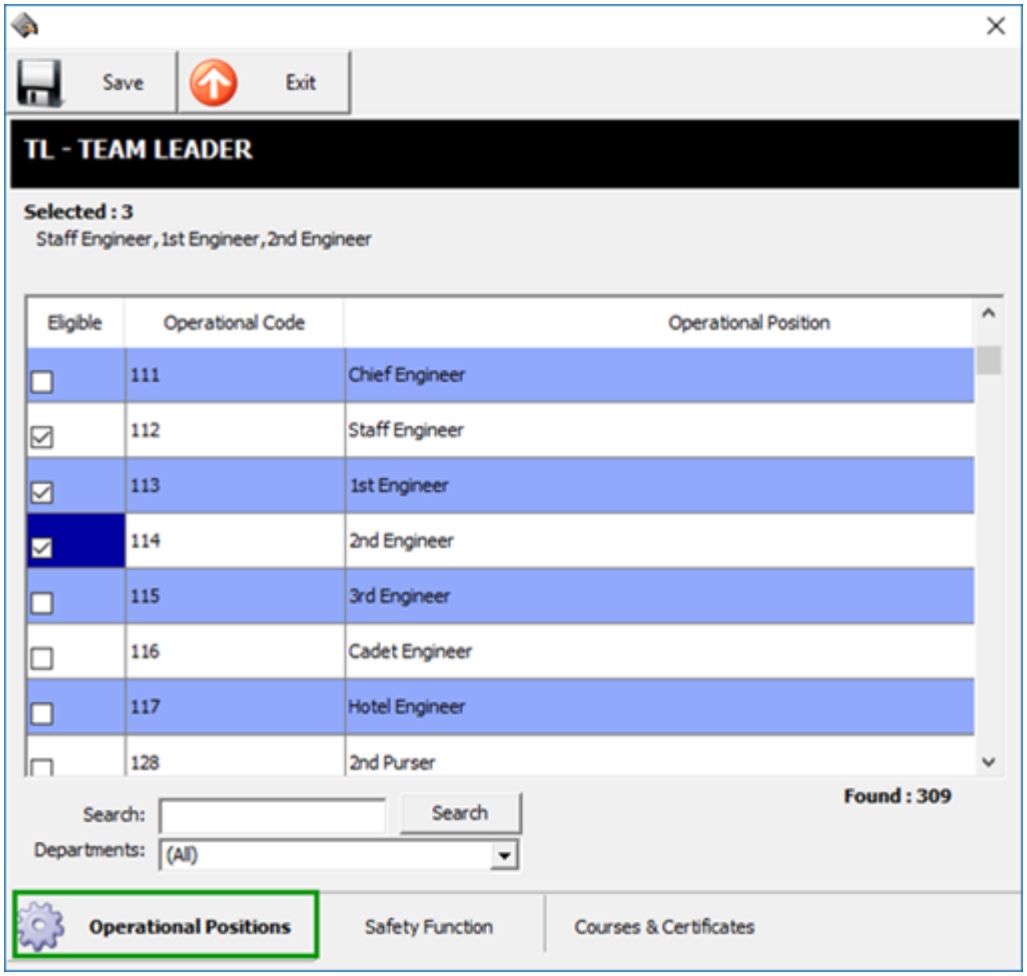
Defining IPM Eligibility

In Port Manning (IPM) eligibility is based on the crew member's Operational Position, Emergency Functions (Muster List), or Course and Certificates. The selection can either be one or both of these criteria.

1. At the IPM Setup window, IPM Compliance section, double-click the **IPM/Safety Role Description** field.
2. Select the eligibility by **Operational Positions, Emergency Functions** or **Course and Certificates** per each IPM Group.

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Figure 7-124 IPM Setup Eligibility



- **Operational Positions**: Crew members whose position matches the selected operation position.
- **Safety Function**: Crew members whose safety number assigned is the same as the selected safety function.
- **Course & Certificates**: Crew members have either completed the selected primary course or selected a substitution course and primary certificate or selected substitution course.

3. When you un-assign the IPM Group from the Safety Department, the system checks whether the IPM Group has crew members assigned in the IPM Assignment.
4. If the answer is yes, you will receive a warning message before you can proceed.
5. When the IPM Group has crew members scheduled, you cannot un-assign the IPM Group from the Safety Department.
6. Click **Save** to save the selection, and click **Exit** to close the window.

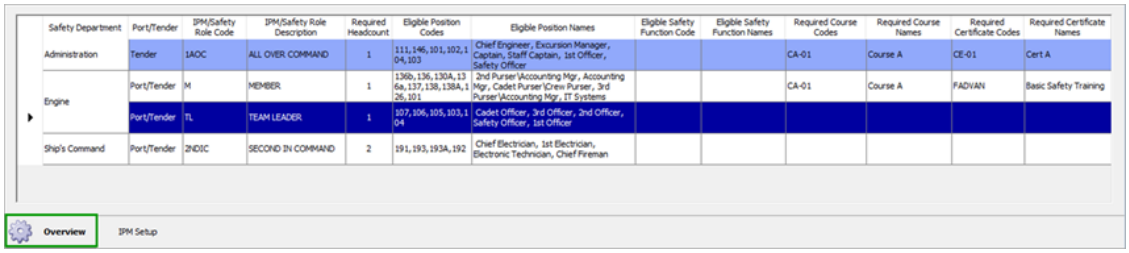
Overview of IPM Setup

In Port Manning (IPM) eligibility is based on crew member's Operational Position, Emergency Functions (Muster List) or Course and Certificates. The selection can either be one or both of these criteria.

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This function shows all of the required Head Count, Eligible Operational Positions, Emergency Functions, Required Course, and Certificate per each Safety Department, IPM Group/Function.

Figure 7-125 IPM Overview Window



Double-click the field name on the Overview window to assign the eligible Operational Positions or Emergency Functions.

IPM Assignment

Other than setting up the In Port Manning (IPM), the Safety Officer must assign onboard crew members based on their eligible criteria in the respective IPM Group. In this function, only crew members who are on-board are shown in the IPM Assignment window. Crew members who have signed off will not be listed.

Assigning Crew to IPM Group

1. From the Safety menu, select **IPM Assignment**.
2. In the IPM Assignment window, select the **Occurrence Required** to display, and select the **Safety Department** from the drop-down list.
3. The **Operational Department** to display defaults to **All**. Select the department if required.
4. Select the **Type of Eligibility** to display and/or **type of crew** to filter from the drop-down list.
5. Select the **Assigned** check-box to assign the selected crew from the grid individually or use the **Select All** to assign all crew shown in the grid.
6. Crew members with multiple assignments have an additional IPM Code in the **Belongs to IPM** column. To view crew with multiple assignments, select **crew members** with Multiple Assignment from the Filter option.
7. Once a crew is assigned to the IPM Group, the number of crew assigned to the IPM Group then populates in the Compliance Requirements.
8. Some of the IPM Groups could have the same eligible Operational Positions or Emergency Functions and may appear or be assigned to more than one IPM Group, depending on the Ship's operation.
9. Assignment of a crew to multiple IPM Group is controlled by setting the **Safety, InPortManning Enable One Crew Assignment per Group** parameter to zero. If the parameter is set to 1, the system prompts a dialog before removing the Crew from the previously assigned IPM Group.
10. To un-assign the crew from the IPM Group, deselect the **Assigned** checkbox and at the message prompt, select **Yes** to confirm.

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IPM Scheduling

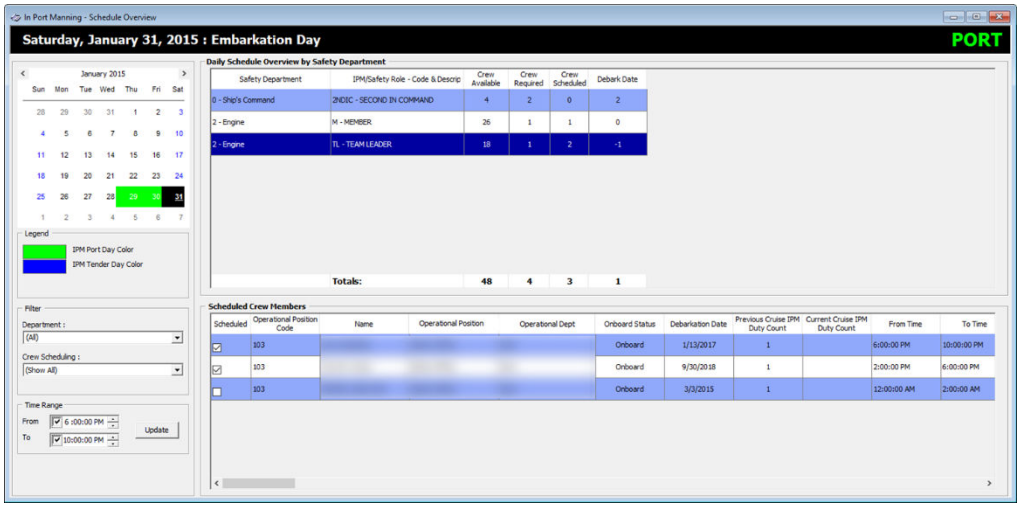
The In Port Manning (IPM) Scheduling Tool allows the Department Head to schedule daily tasks for crew members on duty when at port based on the set up in the IPM Group and IPM Assignment.

In the IPM Scheduling window, the system displays IPM Groups per department based on IPM Port Occurrence setup for that day. See topic *IPM Port Occurrence* for more information.

In the Scheduled Crew Members section, the system display the list of crew members according to the respective IPM Assignment and crew embarkation/disembarkation within the system cruise date.

Crew members who have IPM duties are not allowed to go ashore. The Gangway Security staffs receives an alert when crew members swipe their card at the gangway. This setting is configured in **Administration, Security Alert Setup** using a script. Please consult Oracle Support for more information.

Figure 7-126 IPM Scheduling Window



In the window, only the crew with IPM Assignment can view other crew members within the same IPM group.

For example:

Crew A, B, C are eligible to IPM Group – Commander Lifeboat. Assign crew A, B to same IPM Group, where crew C does not belong in any IPM group. If crew C logs in, IPM scheduling will not show any available crew for scheduling. If crew C is assigned to the IPM group and logs in, IPM scheduling then shows all available crew members who belong to the same group of logged in crew.

Scheduling a Crew

1. In the IPM Scheduling window, select the **date** and the **Safety Role** from the Daily Schedule Overview by Safety Department.
2. In the Scheduled Crew Members section, select the **Scheduled** checkbox of the crew.

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3. In the Time Range editor, select the **checkbox** and adjust the time accordingly, and click **Update** to populate the new time.

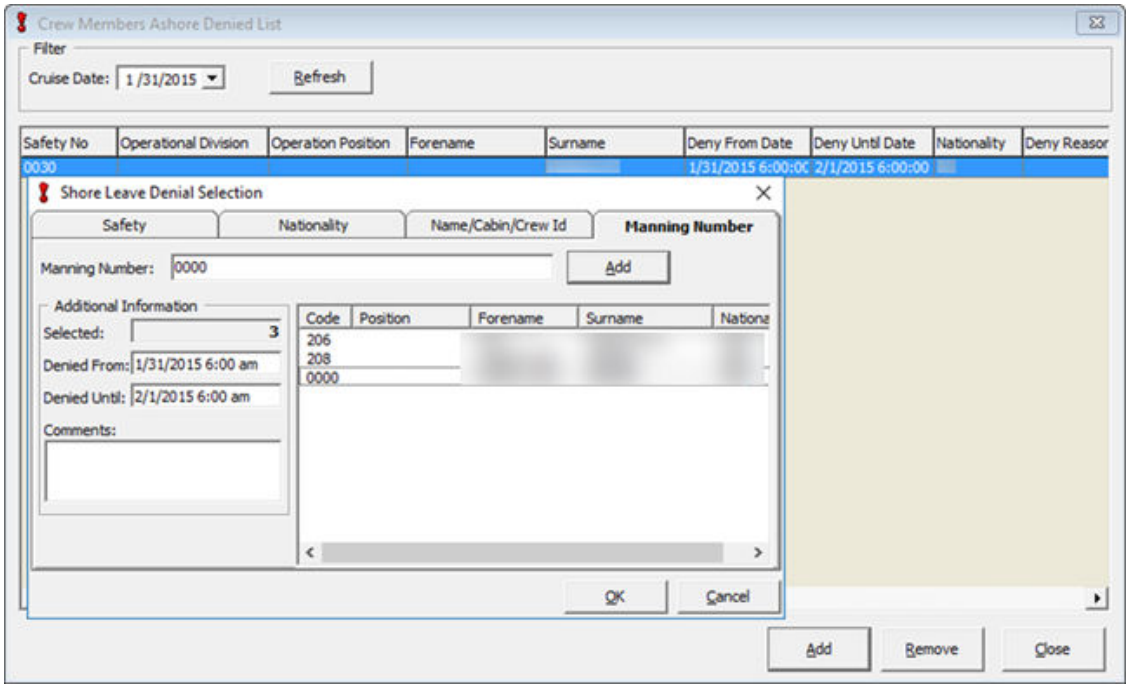
You can schedule one crew duty in advance over the period of the current cruise. If a crew member is assigned to more than one IPM groups, only one duty per day is allowed.
If scheduling is performed on the same day as the System Date, the system only allow you to schedule crew members whose status is onboard. This is to prevent accidental assignment to crew members who are already ashore and not able to perform the duty.

All schedules performed on past cruises are not modifiable.

Ashore Deny List

This function restricts the crew movements by denying them from going ashore, using either by Safety Number, Nationality, Name/Cabin/Crew ID, or Manning Number.

Figure 7-127 Crew Ashore Denied List



Denying Crew From Going Ashore

1. From the **Safety Menu**, select **Ashore Deny List** option.
2. Select the **Cruise Date** from the drop-down list and click **Refresh**.
3. Select the tab to add the deny list and enter the **search identifier**.
4. In the Additional Information section, enter the date to deny from/until and reason in the comments field
5. Click **Add** to add the crew name to the selection grid and click **OK** to confirm.
6. Denied crew name(s) with its Operational Position, denied From/Until date and Nationality are shown in the grid.
7. To remote the name from the Denied List grid, select the **name** and click **Remove**. Use CTRL +- or SHIFT + to remove crew name by batch.

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8. At the confirmation prompt, select **Yes** to proceed.
9. Click **Close** to return to the main window.

Reports

A set of operational reports are pre-installed with the software, and additional customized reports can be added through the **Administration module, System Setup, Reports Setup.**
Printing a Report

1. From the **Crew** File Menu, select **Reports**.
2. In the Reports List section ,click the **(+)** to expand the container, and select the **report** to print.
3. Navigate to the **Print tab**, and select the available **Selection/Criteria**.
4. Select a **Printer, Print Range** and **Copies** to print from its respective section, and click **Print**.
5. To view a report before printing, repeat the above steps and navigate to **Preview tab**.
6. To export the report, repeat the above steps, and click **Export**.

Batch Reporting

You can print a set of departmental reports by batch, and these reports are predefined in **Administration module, System Setup, Reports Batch Printing Setup**.

To print the report by batch,

1. Select **Reports Batch Printing** from the Reports options.
2. In the Batch Reports Printing window, select the **batch number** to print.
3. In the Printer selection section, select the **Printer** and click **Run**.

Options

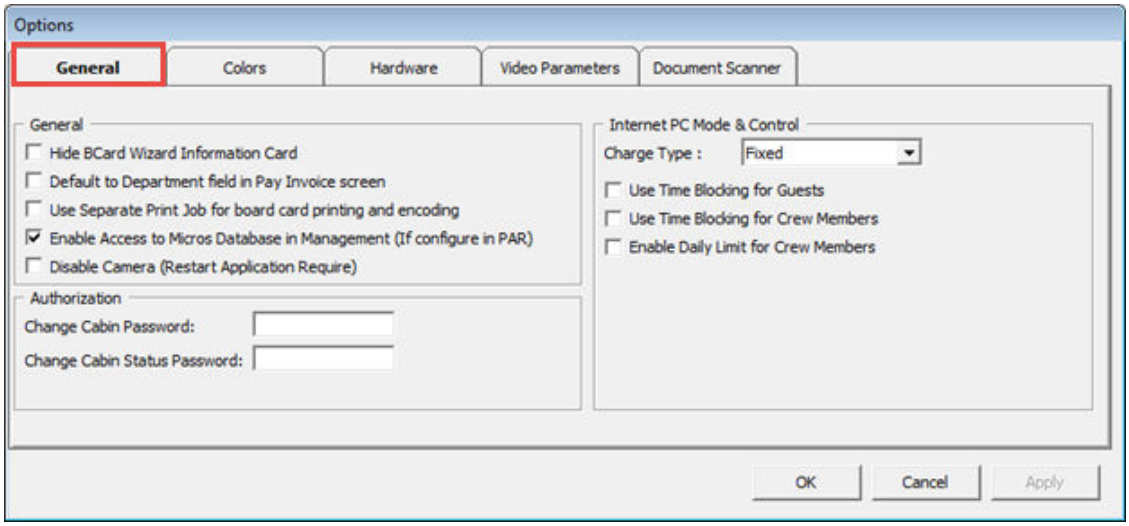
The Options Menu is where you set up the hardware and devices supported by SPMS. The menu is accessible from the Crew Main Menu.

General Tab

In the General Tab, the options to switch on/off is determined by selecting the respective checkboxes. By default, the checkboxes are not selected.

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Figure 7-128 Options Menu — General Tab



Colors

The Colors tab allows you to define a standard color scheme suitable for your operations. These colors can be easily changed by clicking the color bar and selecting the color from the color chart.

Hardware

Supported peripherals, printers, and devices are configured in the Hardware tab. The window varies depending on the type of report printer's you select. Please contact Oracle Hospitality Cruise Customer Support for list of compatible hardware.

Video Parameters

This section defines the video format, source, and type of compression to store in the database.

Document Scanner

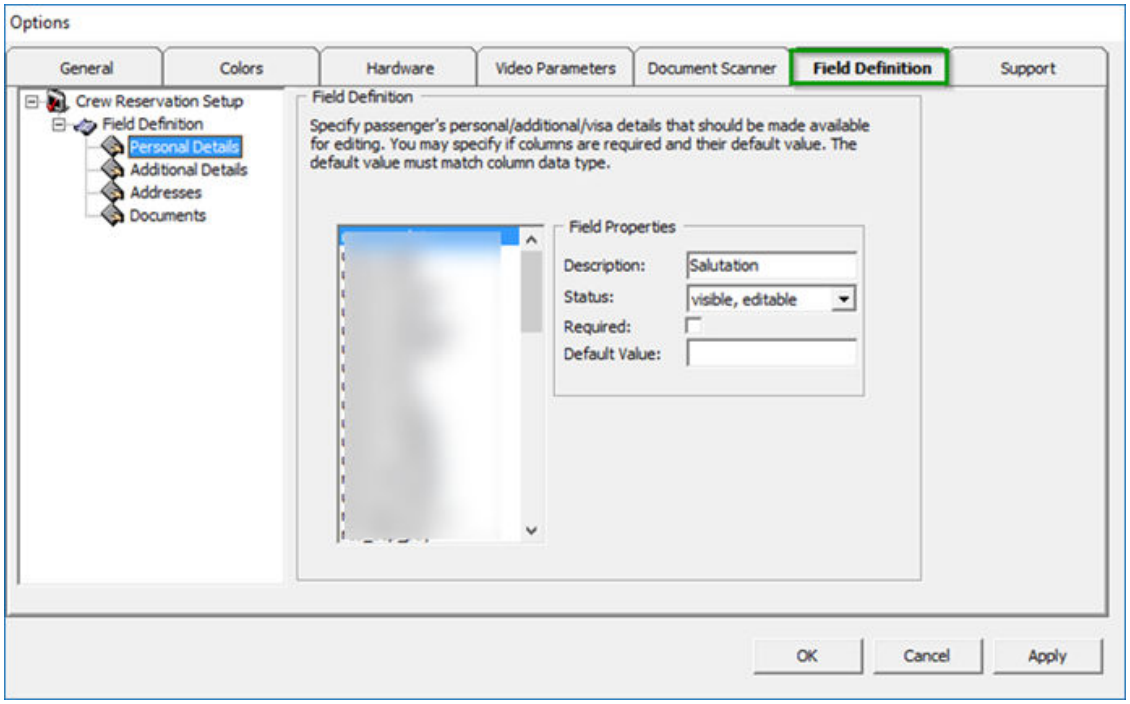
You can link a scanner for scanning specific forms in this tab. Please contact Oracle Hospitality Cruise Customer Support for compatible hardware list.

Field Definition

This section allows you to customize the crew reservation window labels in the Crew's personal/additional/visa details tab.

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Figure 7-129 Field Definition Tab



Security

In the Security menu, function such as User Login, Passenger movement from ship to shore or vice versa, statistic count of passengers on-board or at shore side can be found.

Login

The Login function enables you to log out/log in from a current session using either a **Function key (F8)** or by selecting the option from the Security menu.

Change Password

The Change Password function allows you to reset passwords. You must log in prior to accessing this function.

1. From the Security Menu, select **Change Password**.
2. Enter the **new password**, confirm the password, and click **Apply**.
3. At the Password Successfully Changed prompt, click **OK**.

User Logfile

The User Logfile records all transactions performed by users by date, and by time order. Use the available filters such as by user, type of activities, date, time, or workstation to retrieve log information. The transaction logs are printable and exportable to a supported file format.

Gangway Logfile

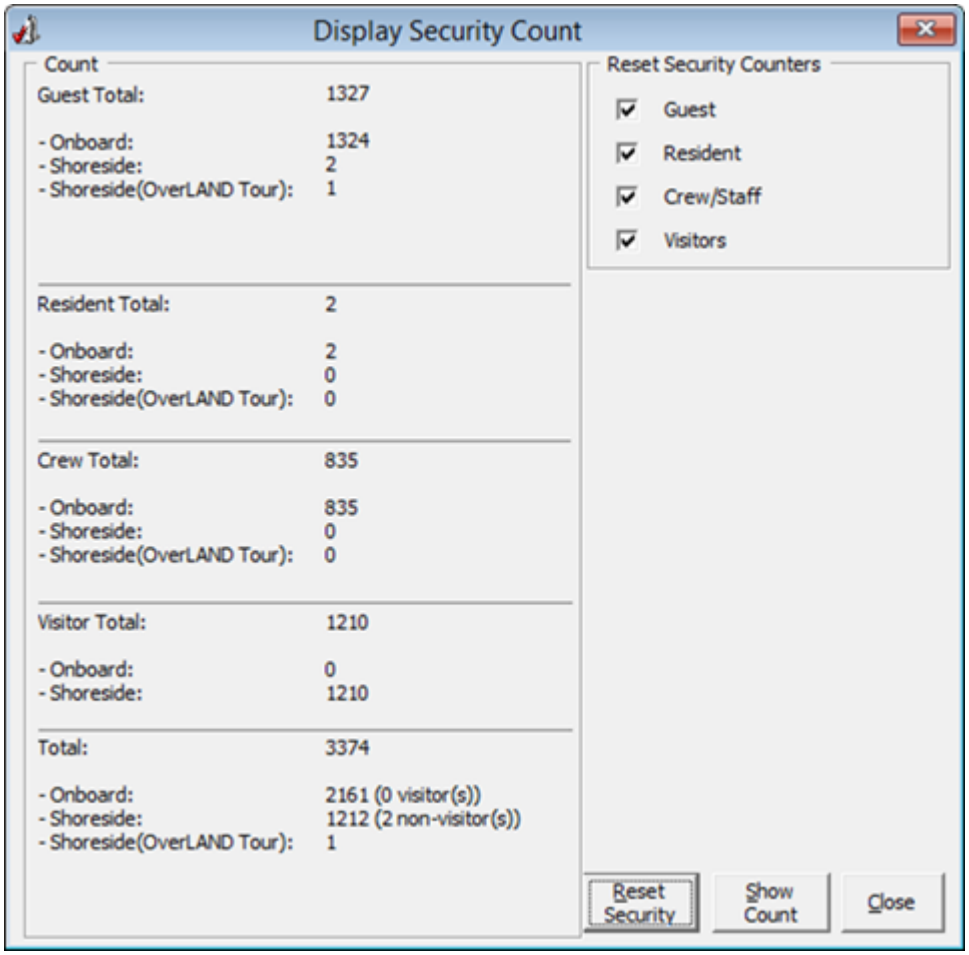
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The Gangway Logfile records the gangway movement for all passengers going ashore or coming onboard. Use Search to find information by location, movement directions, type of passengers, date, time, cabin number, and name. Retrieved information is available for printing or exporting in a supported file format.

Count Onboard/Shoreside

The Count Onboard/Shoreside shows the security count of total crews and the number of crews onboard or at shoreside. The counts are displayed by type of crews.

Figure 7-130 Count Onboard/Shoreside



To reset the count, click **Reset Security**. The messages prompt varies on each reset.

Guests/Crew Onboard

The Guest/Crew Onboard lists all crew members onboard, with the Last Coming On-Board status shown when selecting the crew's name.

The status of the guest can be change by:

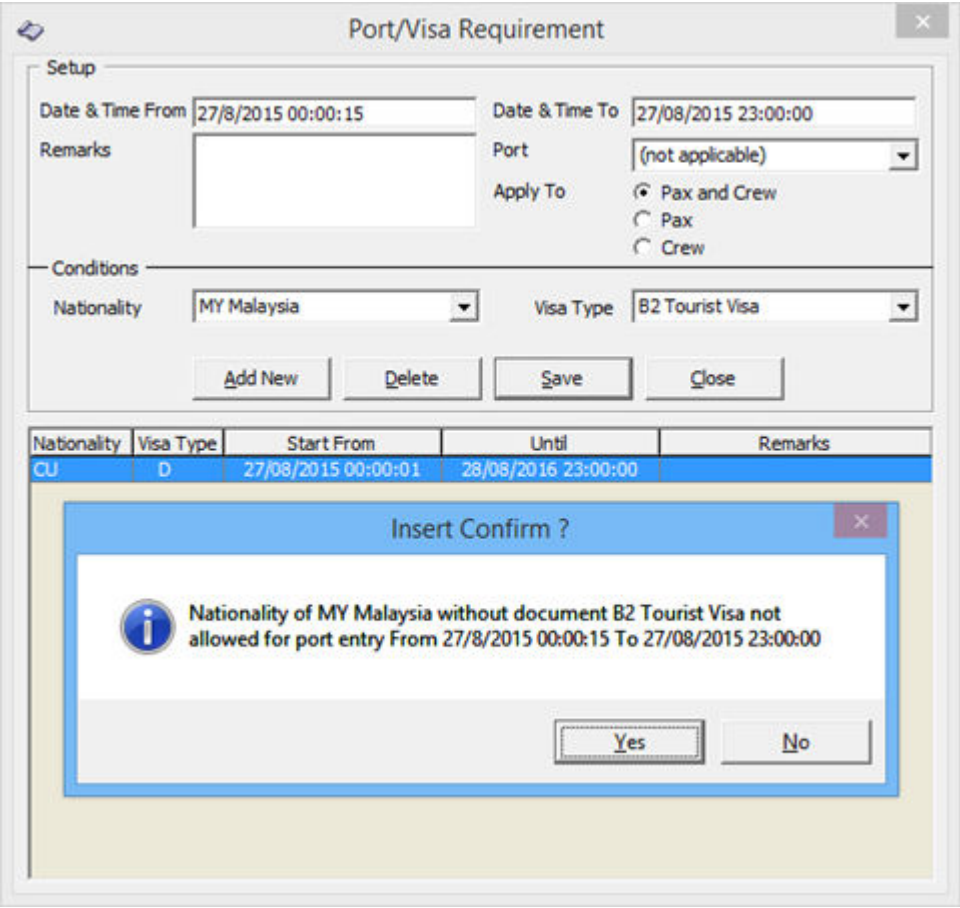
- Clicking the Go Ashore / Go Onboard.
- Clicking the Gangway Log to open the Gangway movement log.

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Port/Visa Requirement

You can restrict crew members who have travel restrictions on their travel documents from going ashore on port day. Once set up, the system prompts a notification window when a restricted crew member's passport/travel document is swiped at the Gangway.

Figure 7-131 Port/Visa Requirement



1. From the Security menu, select **Port/Visa Requirement**.
2. Click **Add New**, enter the **Date/Time From/To field**, and select the **Port** from the drop-down list.
3. At the **Conditions Setup** section, select the **Nationality** and **Visa Type** from the drop-down list. and click **Save**.
4. At the Insert Confirmation prompt, select **Yes** to confirm, and click **Close** to exit.

Appendix A. Parameters

This section describes the Parameters available in the Crew module. You can access Parameters from the **Administration** module under **System Setup, Parameter**.

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Table 7-29 PAR Group Safety

PAR Name	PAR Value	Description
Advance Safety Drill	0 or 1	0 - Standard Safety Drill Handling; 1 - Advance Safety Drill Handling.
Course Code for Boat Commander	XXX	Qualifying course for Boat Commander. (XXX=COU_CODE).
Allow Multiple Safety Number Assignment	0 or 1	0 - Do Not Allowed Multiple Safety Number Assignment 1 - Allow
Allow to use special In Port Manning handling	0 or 1	0 - Disallow, 1 - Allow
Auto Set Ashore Denial During Drill Scheduling		Specify duration before a Drill starts that going ashore is denied. Duration in minutes.
Display Valid Courses On Muster List Assignment		Display list of important courses on Muster List Assignment window. PAR_VALUE should contain COU_CODE separated by commas (for example: 331,321)
Operational Position that Receive Message		Crew of certain operational position to receive warning message in Active Muster List when there is expected crew in the muster list.
Allow SafetyNo Assignment to Onboard And Expected		0 = both onboard and expected crew per safety number. 1 = one crew per safety number at any one time.
InPortManning Enable One Crew Assignment per Group	0 or 1	0 = Crew is allowed to be assign to multiple IPM Group. 1 = Crew is not allowed to be assigned to multiple IPM Group.

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Table 7-30 PAR Group General

PAR Name	PAR Value	Description
Duplicate Safety Number	0, 1, 2 or 3	0 = Prompt for further action. 1 = Keep both safety numbers assigned for checked-in crew and embarking crew. 2 = Assign Safety Number to newly embarked crew and un-assign checked-in crew. 3 = Remove the safety number from expected crew and maintain safety number for checked-in crew. This option is performed in silent mode.

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8
Time and Attendance

The Time and Attendance modules, including the Time and Attendance for Terminal, enable shift supervisors to prepare weekly crew schedules by location and tasks, and record crew clock in/out times. The T&A Terminal allows crew members to efficiently clock in/out of tasks, and review and approve their worked hours.

Parameters

The following table describes the System Parameter (PAR name or PAR value) available for the Time and Attendance module. You can access them from the *Administration module* or *Time and Attendance module* under Configuration, Parameters.

Table 8-1 Parameter Group — T&A

PAR Name	PAR Value	Description
Approval Frequency	<day>	Every x number of days in which the crew must approve their worked hours.
Approve Daily Worked Hours Clock-In/Out	<0,1>	Allows crew to approve their daily worked hours for clock-in/out.
Approve Weekly Hours		For use on T&A Terminal. 1= Show screen View My Weekly Hours. 0= Hide.
Auto Adjust Time Slots on Terminal		Auto adjust overlapping time slots when crew add/edit their time.
Auto Log-out After x Mins of Inactivity		Number of minutes to wait for before auto log-out and exit to the main log-in menu when there is no activity on the Time Attendance Terminal. Specify the PAR value in number of minutes.
Crew Daily Work Time Approval For Clock In/Out		Daily cut-off time to show daily approval hours on the terminal to crew.
Daily Work Time Approval		Denotes the time (in 24 hrs. format) that crew members must approve their total worked hours daily.

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Table 8-1 (Cont.) Parameter Group — T&A

PAR Name	PAR Value	Description
Display Date Time on Terminal		Option to display date time on terminal. Do not enable this option if the terminal hardware is slow. The Timer utilize the terminal resources to display the date time and may impact the performance.
Display Messages X days old at Terminal		Show only Messages X days old at Terminal. If value = 10, then terminal will only display messages dated from the previous 10 days.
Display Previous X days Clock-In/Out at terminal		Show only Previous X days Clock-In/Clock-Out activities in Manual Clock-In/Out screen. If Par value is 3, then the system will show previous three days of activities in Manual Clock In/Out.
Enable Batch ClockIn/Out		0-do not allow batch clock in/ out, 1 – allow to post to future only, 2 – allow to post to past and future.
Enable Manual Clock In/Out		Allows crew to access the Manual Clock-Clock-In/Out button at T&A Terminal.
Enable More Info		Allows crew to view the more info button on the terminal.
Enable View My Account		Allows crew to view their account overview on the terminal.
Enable View My Messages		Allows crew to view their messages on the terminal.
Enable View My Schedule		Allows crew to view their schedule on the terminal.
Filter Crew by Payment Type and Contract Type		Allows manager to filter crew by payment type on the Broadcast Message screen.
First Day of Week		First day of weekly schedule. 1= Sunday, 2= Monday, 3= Tuesday, 4= Wednesday, 5= Thursday, 6= Friday, 7= Saturday
Grace Period After Clock-In		Number of minutes for grace period after clock-in.
Grace Period After Clock-Out		Number of minutes for grace period after clock-out.
Grace Period Before Clock-In		Number of minutes for grace period before clock-in.

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Table 8-1 (Cont.) Parameter Group — T&A

PAR Name	PAR Value	Description
Grace Period Before Clock-Out		Number of minutes for grace period before clock-out.
IFC Time AttendanceCalc process every X minutes		Every X Minutes the interface calculates the total worked/rest hours.
ILO Maximum Work Hours in 24-hour period		Specify the maximum number of hours that a crew member can work in a 24-hour period as governed by the International Labour Organization (ILO).
ILO Maximum Work Hours in 7-day period		Specify the maximum number of hours that a crew member can work in a 7-day period as governed by ILO.
ILO Minimum Block Rest Hours in 24-hour period		Specify the minimum block (number of hours) that a crew member must rest in a 24-hour period as governed by ILO.
ILO Minimum Rest Hours in 24-hour period		Specify the minimum number of hours that a crew member must rest in a 24-hour period as governed by ILO.
ILO Minimum Rest Hours in 7-day period		Specifies the minimum number of hours that a crew member must rest in a 7-day period as governed by ILO.
Internal Browser Parameters		Webpage and set of the parameter passed to the browser for time attendance terminal.
Minutes Round Up		Clock-in/out are rounded at x-minutes before and after each quarter hour (00, 15, 30, 45). The system does this internally for the purpose of calculating the number of hours to be paid.
Past X Days Crew Can Request Approval Change	<0 to 7>	Past number of days that crew can access to change schedule approval.
Restrict Login to Terminals		Crew can only log in to certain terminals based on the set up of terminals.
Schedule Validation Exception Positions		Value of OPO_ID separated by commas or leave it empty.
Use Alphanumeric Keyboard		1= Use alphanumeric keyboard on the terminal, 0= Use numeric keyboard.

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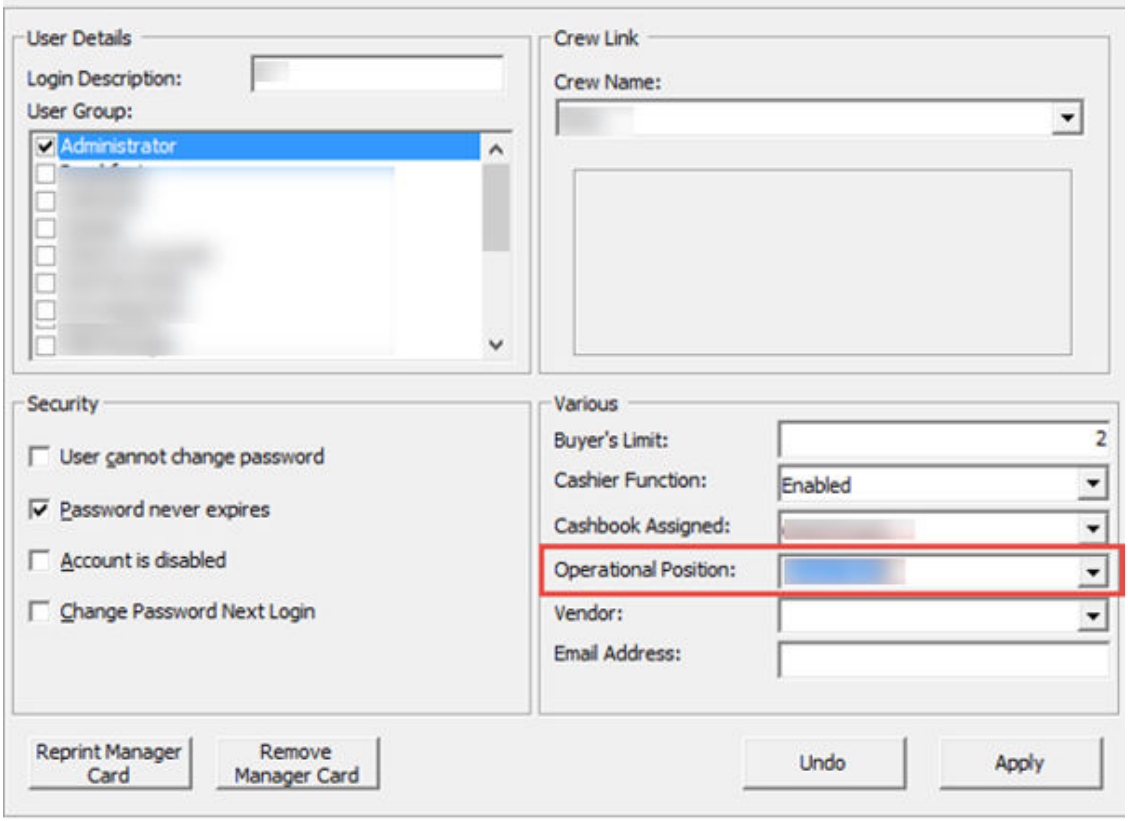
Table 8-1 (Cont.) Parameter Group — T&A

PAR Name	PAR Value	Description
Use Clock-In/ Clock-Out		1= Use clock-in/clock-out method, 0= Use time approval method.
Use Signature Capture		1= Use signature capture, 0= Signature capture not used.
View Current Weekly Hours Clock-In/Out		Allows crew to view current week worked hours for clock-in/out.
View Daily Hours Clock-In/Out		Allows crew to view daily worked hours for clock-in/out.
View Invoice by Voyage		Displays crew invoice by voyage on the terminal.
View Upcoming Drills		Shows upcoming drills on terminal.

Operational Position Rights

All users accessing the Time and Attendance module must have an Operational Position linked to their login credentials. This is to determine the location the crew belongs to and ease information retrieval within the program.

Figure 8-1 User Access — Operational Position



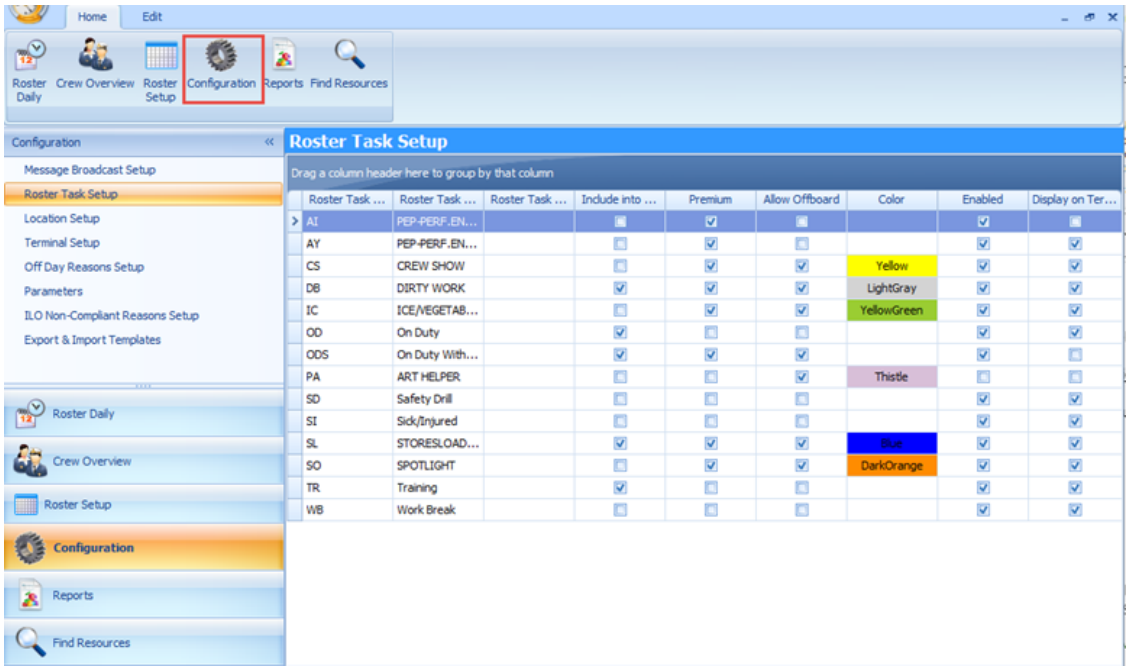
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1. Log in to **User Security** module.
2. In the User Details, Various section, select the **Operational Position** from the drop-down list.
3. Click **Apply** to save.

Configuring Time Attendance

Before you can use this program, you must configure the codes in Message Broadcast, Roster Task Setup, Location, Terminal, Off Day Reasons, and International Labour Organization (ILO) Non-Compliant Reasons using the steps below.

Figure 8-2 Configuration Menu



Accessing the Configuration Menu

1. Log in to the **T&A** module.
2. At the Home tab, select **Configuration** from the ribbon bar.
3. The type of setup available to T&A module is listed on the Configuration window.
4. Go to Edit tab and select a **code** to set up.

Roster Task Setup

The program is software coded with five roster tasks, listed below. You cannot delete these tasks:

- **OD:** On Duty
- **ODS:** On Shore side Duties
- **SD:** Safety Drill

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- **SL:** Sick/Injured
- **TR:** Training

To set up the task:

1. Select **Roster Task Setup** from the Configuration window.
2. Select **Add** to open the Add Roster Task window.
3. Insert the **Code, Name, Description,** and select the **Color** code from the drop-down list.
4. Select the applicable checkboxes and click **Save**.

Table 8-2 Field Definition of Roster Task

Field name	Description
Color Code	Representation of task in Schedule or Monthly Overview window.
Include into Working Hours	Takes into account the over time (OT) work hours and hours worked (ILO) when calculating the total work hours.
Premium	Defines the work hour as premium paid hours. The hourly premium work rate is set up in the **Payroll module, Maintenance,** and **Interfaced Paycodes**. Premium roster task is accountable in Service Charge calculation and deducts from total pools before distributing the pool to all entitled crews.
Allow Offboard	The crew assigned to this roster task is allowed to go ashore. Otherwise, they are flagged as Shore Denied.
Display on Terminal	The task is displayed in T&A Terminal and available for crew scheduling.
Enabled	By default, the newly added task is active.

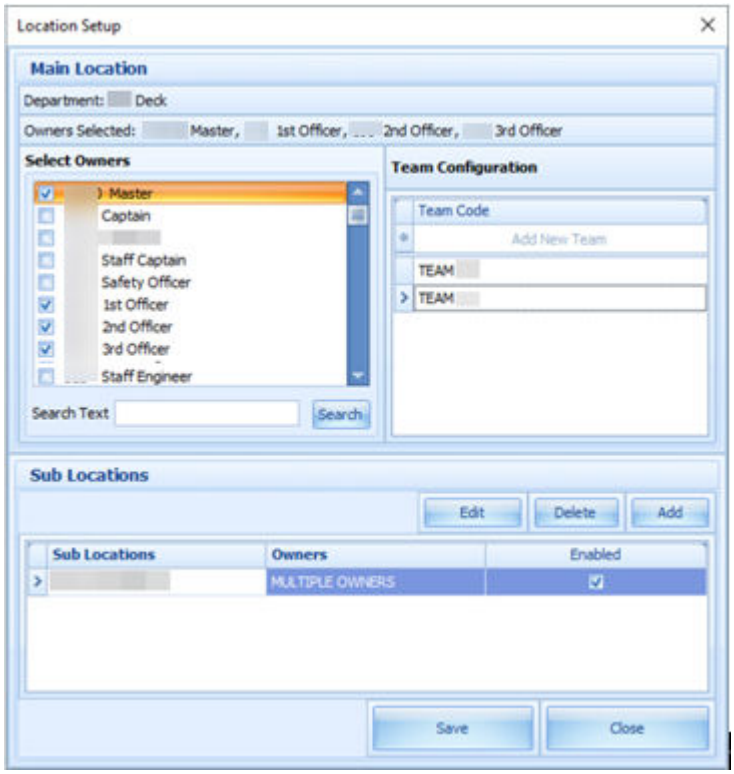
Message Broadcast

1. In the Configuration window, select **Message Broadcast Setup**.
2. Select **Add** from the **Edit tab** to open a new broadcast setup window.
3. Insert the **Preset Message Code, Subject**, and **Content** in the respective field.
4. Click **Save**.
5. To edit the code, double-click the **preset code** or click **Edit** on the ribbon bar, and click **Save**.

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Location Setup

Figure 8-3 Location Setup



The Location Setup window populates the location configured in Administration, Operational Division Setup. Adding/editing is not permissible. However, this function permits you to assign an owner(s) to the specific location or add a sub-location.

The Team Configuration section allow you to assign a crew to a different team.

1. From the **Configuration** window, select the **Location Setup**.
2. Select the **location** to edit by double-clicking or click **Edit** on the ribbon bar.
3. At the **Location Setup** window, select the owner(s) by selecting the respective checkboxes. Use the **Search Text** field to search for the specific owner or scroll through and select the owner.
4. At the Sub Locations section, click **Add**.
5. Enter the **Sub Location code, Name and Description**.
6. Select the **Deck** checkbox and select the **Deck Code**, if any.
7. Select the **Owners** and click **Save** to save the sub-location.
8. Click **Save** to save and close the **Location Setup** window.

Terminal

1. At the Configuration window, select the **Terminal Setup**.
2. Select **Add** from Edit tab to open an Add Terminal window.

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3. Insert the **Code, Name, Description,** and **PC Name** and select the **Location** checkbox to select the Location from the drop-down list.
4. Click **Save** to save the window.

Off Day Reasons

The Off Day reason is used by the crew or manager to approve the zero worked hours. These are pre-screened by the crew at the terminal.

1. In the Configuration window, select the **Off Day Reasons**.
2. Select **Add** from the Edit tab to open an Off Day Reasons window.
3. Enter the **Reason Code, Description**, and **Long Description** and then click **Save**.

Parameters

The T&A module has a set of parameters that control the functions within the program. Enabling or setting these parameters changes the behavior of the module. Proceed with caution. See topic, Parameters, for a detailed description of each parameters.

To edit the parameter, double-click the **Parameter** name and enter the required **value** in the Value field.

ILO Non-Compliant Reasons

The ILO (International Labour Organization) Non-Compliant Reasons is used when approving the violated crew schedules. The setup is the same as Off Day Reasons.

Export & Import Templates

The Export and Import Templates function allows the ship operator to copy the Templates, Parameters, User Security Settings, and Multiple Templates from one ship to another and only supports XML file format. An import of the any templates will override the pre-existing database templates. Proceed with caution.

Setting Up Roster Template

The Roster Setup is comprised of Schedule Templates, Activation, Maintenance, Location and Non-Scheduled. The function in Roster Template is comprised of three parts: Team Assignments to Crew, Roster Template and Scheduling, and Schedule Validation.

To access these functions, click the **Roster Setup** at the ribbon bar.

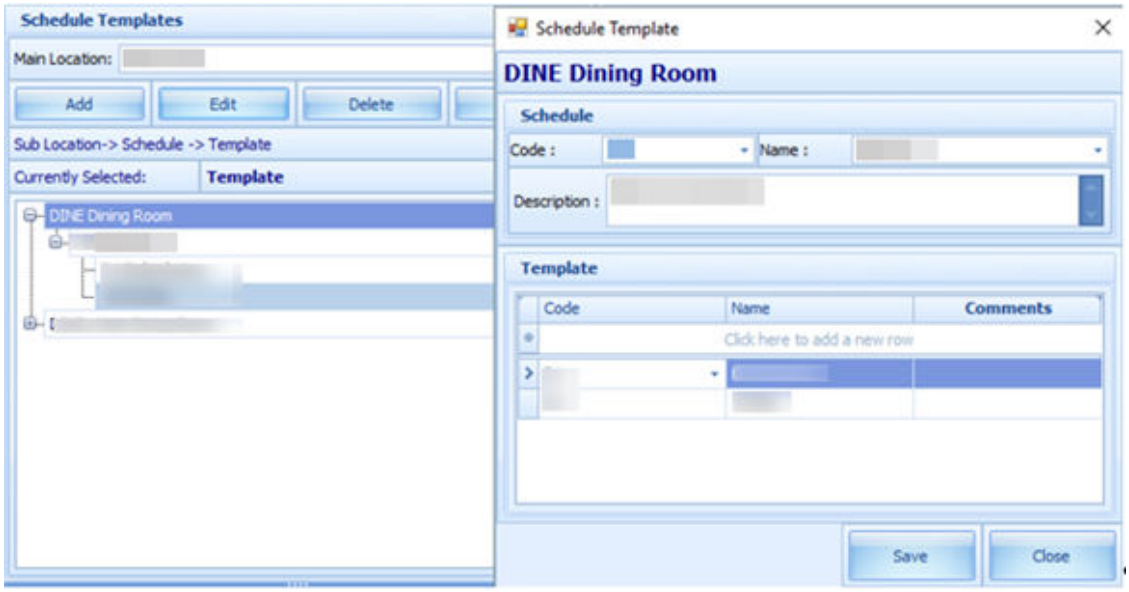
Roster Template and Scheduling

Before you can schedule task(s) to a crew and to ease future scheduling, we recommend that you create a schedule template for each sub-location.

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Schedule Templates

Figure 8-4 Schedule Templates

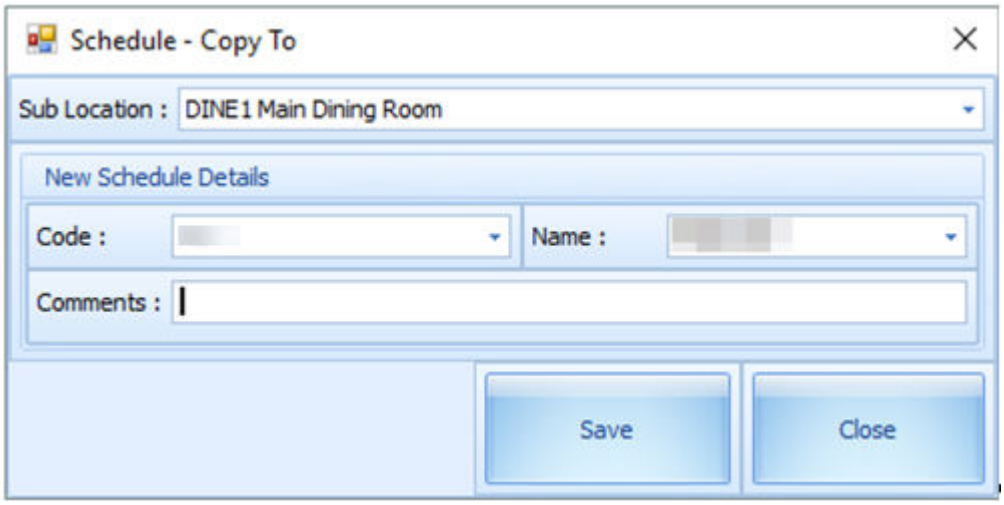


1. In the Roster Setup window, select **Roster Template & Scheduling**.
2. In the Schedule Templates section, select the **Main Location** from the drop-down list.
3. Click **Add** to open the Schedule Template window.
4. In the Schedule section, insert the **Code, Name,** and **Description**.
5. In the Template section, click the **blank space** under the header to add the schedule cruise day by inserting the **Code, Name,** and **Comments**.
6. Click **Save** to create the cruise type and days.
7. To edit the cruise day/type, select the **line item** and click the **Edit** button.

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Copying Cruise Type by Sub-Location

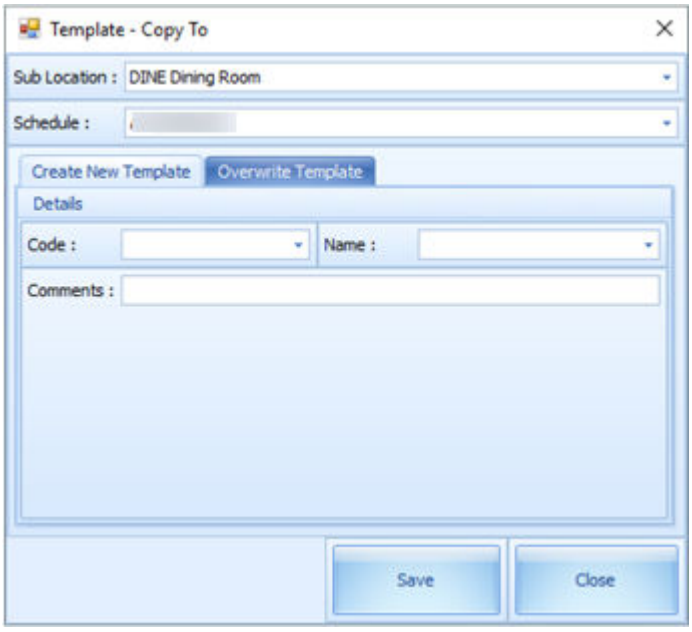
Figure 8-5 Copy Cruise Schedule



1. Select the **Cruise Type** and click the **Copy** button.
2. In the Schedule-Copy To window, select the destination **Sub-Location, Code**, and **Name** from the drop-down list.
3. Click **Save** to complete the process.

Copy Cruise Day by Sub-Location

Figure 8-6 Schedule Template Copy To



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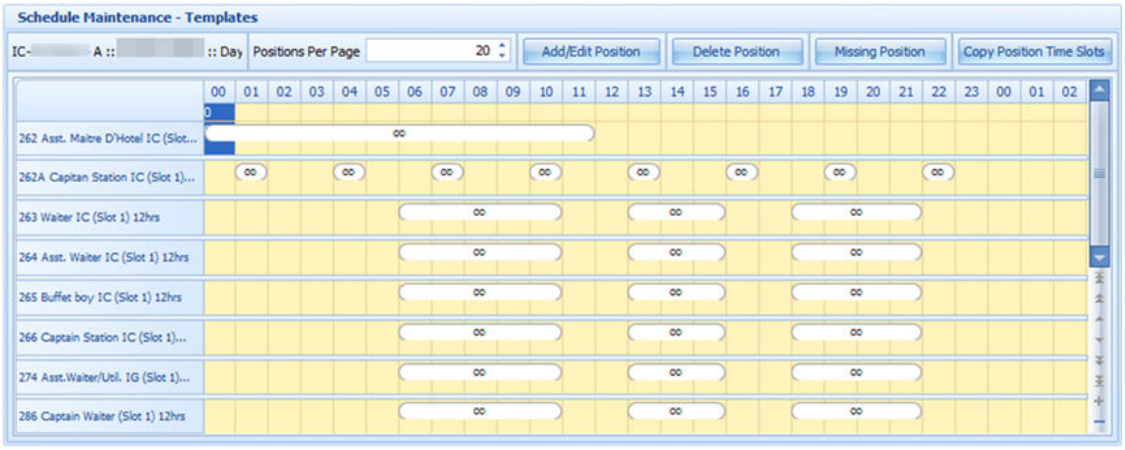
1. Select a Cruise day to copy and then click the **Copy** button.
2. In the Template-Copy To window, select the **Sub-Location** and **Schedule** from the drop-down list.
3. Under the **Create New Template** tab, enter the **Code, Name** and **Comments** and click **Save**. The new template is copied to the same Sub Location.

Overwrite Template of the Same Schedule

1. Select a **Cruise day** to copy and click the **Copy** button.
2. In the **Template-Copy To** window, select the **Sub-Location** and **Schedule** from the drop-down list.
3. Navigate to the Overwrite Template tab, select an existing cruise day to overwrite, and click **Save**.

Schedule Maintenance Templates

Figure 8-7 Schedule Maintenance Template



1. Select a cruise day from **Schedule Templates**, then click the **Add/Edit Position** button.
2. In the **Schedule Maintenance** window, select the **Position** and then the **Slot** from the drop-down list, and **Team**, if any. You can also add a slot by selecting a **Position**. To insert a required slot, click **Add Slot** and click **Save**.
3. The slot number is unique for each position and there are 26 available slots.
4. Click **Save** and **Close** to exit.
5. Each of the crew member should have an individual slot for the position. For example, if the position of Assistant Cook requires 10 crew members to be on duty, then 10 slots must be created for this position.
6. Click the **Save** button in Schedule Maintenance window to assign the position(s) for the cruise day. The defined positions will populate in the grid as shown in Schedule Maintenance Template.

Deleting a Position from Cruise Day

1. To delete, select a time slot and click **Delete Position**.

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2. If the message prompts *"Are you sure you want to delete the selected position"* click **Yes** to proceed or **No** to return to the previous window.
3. You can also click the **Add/ Edit Position** button, select a row any row to delete, and press the **Delete** key on your keyboard.

Creating Time Slots for Position

1. In the **Schedule Maintenance-Templates** grid, select the required time slots for the position, and right-click to display the options or double-click the grid to open the Time Slot window.
2. Select a **Roster Task Code** and enter the **Start/End Time**.
3. Click the **OK** button to save the time slot. The time slots saved are reflected in the grid.

Deleting Position Time Slots

1. Select the time slot from the grid, right-click and select **Delete** or press the **Delete** key on your keyboard.
2. To delete all time slots, right-click on an empty area of the time slot grid to open the Roster Task Options, and select **Delete All Time Slots**.

Copying Position Time Slots

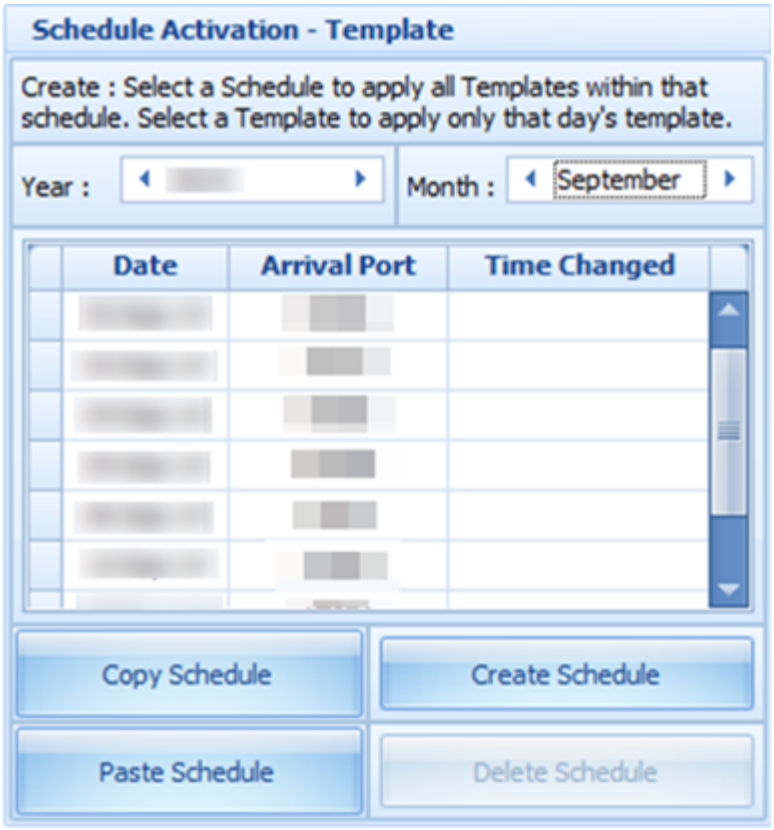
1. Click the **Copy Position Time Slots** from the Schedule Maintenance-Templates window.
2. Select the position on the left pane to copy and select the checkbox on the right.
3. Click **Save** to copy the time slots.

Schedule Activation Template

The Schedule Activation Template enables you to assign a schedule template to the days listed of the selected the month.

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Figure 8-8 Schedule Activation Template



Creating Schedules by Cruise Type

1. Select the **Cruise type** from the **Schedule Template** section.
2. Select the **start date** from Schedule Activation-Template and then click **Create Schedule**. For example, the cruise type has eight cruise days and by selecting 01 April 2017 as a start date for the schedules, it then creates 01 April 2017 as cruise day one, 02 April 2017 as cruise day two, 03 April 2017 as cruise day three and so on.
3. At the confirmation prompt, read the statement before proceeding. Click **Yes** to remove the existing schedule from the date(s). The list of the crew with schedules is listed under the Scheduled section. The Crew Schedule creates the checked-in status by crew first, sorted by name, and followed by the crew with expected status.

Creating Schedule by Cruise Day

1. At the **Schedule Activation-Template** section, select the date and click **Create Schedule**.
2. At the confirmation prompt, click **Yes** to create the cruise day schedule. After the schedule is created, a list of crew created with the schedules is listed in the Scheduled section.

> **Note**
>
> This will remove existing schedule, if any.

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Scheduled and Non-Scheduled

The Scheduled section lists the crew names with schedules, according to the selected date and sub-location, with the slot number of the assigned schedule template in the **Slot** column.

Selecting a crew and clicking the **Delete crew from Schedule** removes the crew schedule from the selected date and sub-location, and places the crew in the **NON-SCHEDULED** section. Crew scheduled at a different sub-location of the selected date will not be shown here but in the **NON-SCHEDULED** section instead.

To assign a crew to the schedule,

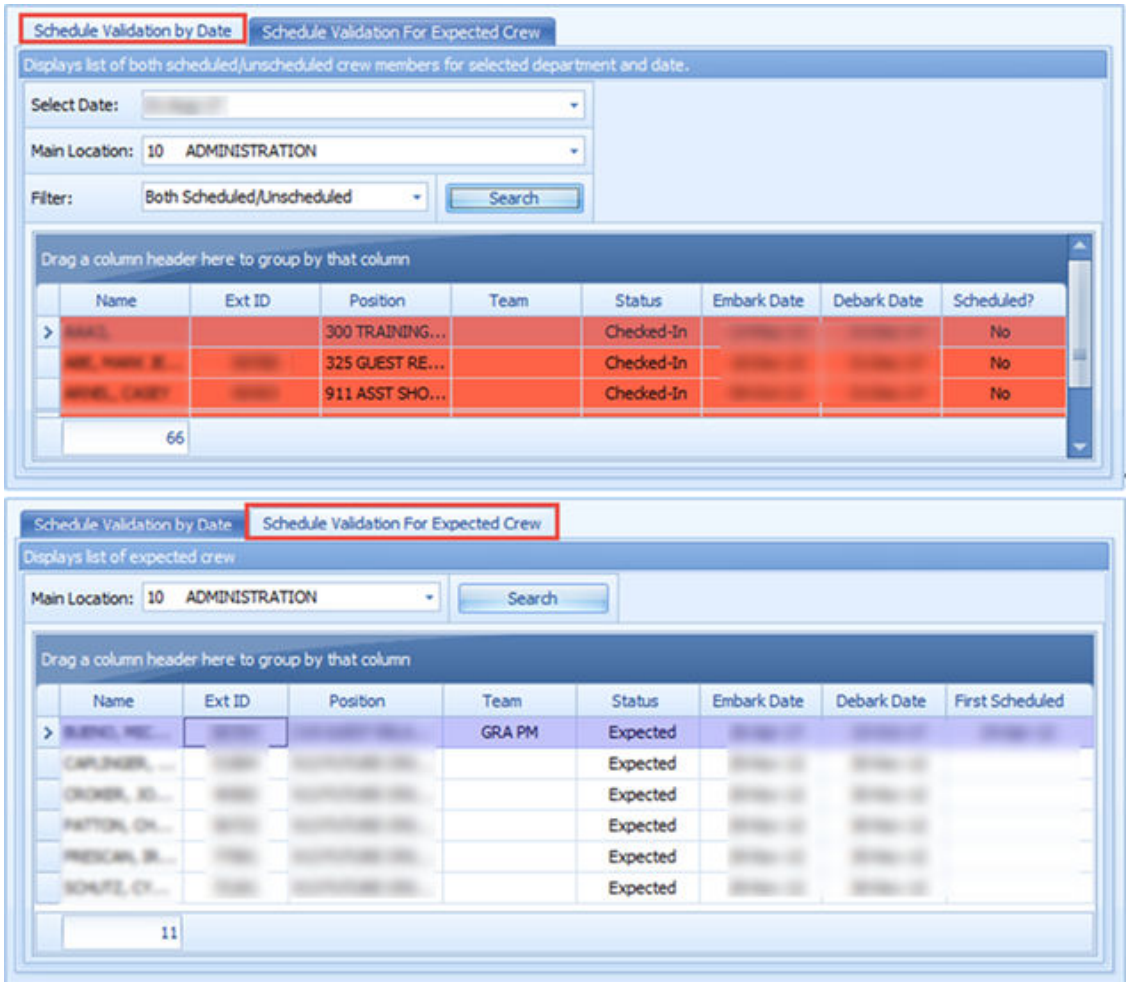
1. Select a crew name and click the **Add Crew to Schedule** to add the crew to the selected date and sub-location.
2. In the Selection window, select the **Position and Slot** from the drop-down list. The position time and crew's position must match the selection in order to create the schedule successfully.
3. You can schedule multiple crews provided the position and time slot are the same.
4. Click **OK** to continue. Crew schedule created manually has a zero time slot.

Team Assignments to Crew

The crew names that match the positions in the roster templates are listed in the Team Assignments to Crew window.

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Figure 8-9 Schedule Validations



In the team assignments, it is necessary to assign the crew to a team if more than one team is working at the same location.

1. In the Roster Setup window, select the **Team Assignments to Crew**.
2. In the Team Assignment window, select a **Sub-Location** or leave as default.
3. Under the crew name, select a team from the **Assign Team To Crew** drop-down list. There are 26 teams available for assignment.
4. Click the **Save** button to save the team assignments.

> **Note**
>
> Only crew that has a team assigned to them can create a schedule from a template defined within the same team.

Schedule Validation

The Schedule Validation has two tabs:

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- **Schedule Validation by Date:** Displays lists of both scheduled/unscheduled tasks by Date and Main Location.
- **Schedule Validation for Expected Crew:** Displays a list of the expected crew with schedule assignment by Main Location.

To validate the schedule,

1. In the Roster Setup window, select **Schedule Validation**.
2. Select the appropriate tab and the options from the drop-down list.
3. Click **Search** to display the list of crew matching the selection.

Roster Daily

The Roster Daily provides an overview of the daily, weekly, and monthly roster, International Labour Organization (ILO) Violations and Summary of Worked Hours Functions. The features within the Roster Daily vary, depending on the mode set in **Parameter, Use Clock-In/Clock-Out**.

0 - Time Approval Method

1 - Clock-In/Out Method

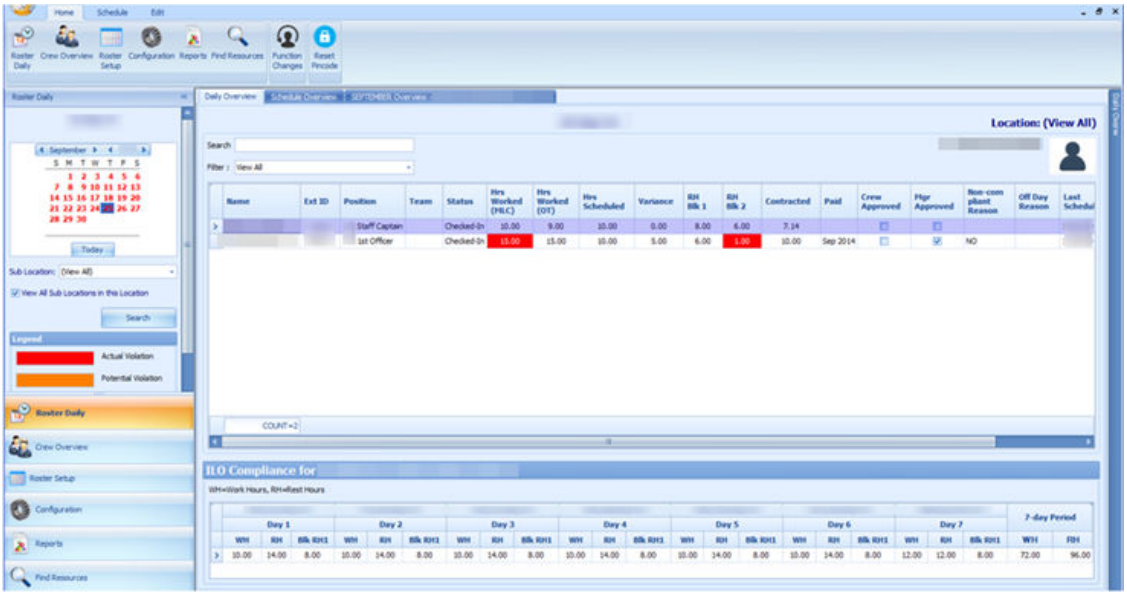
2 - Combination of Time Approval and Clock In/Out Method

Time Approval Method

The Time Approval Method consists of Daily Overview, Schedule Overview, Monthly Overview, Function Change, and Reset Pincode.

Daily Overview

Figure 8-10 Daily Overview in Time Approval Method



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Table 8-3 Field Definition of Daily Overview Tab

Field Name	Definitions
Name	Crew's name.
Ext ID	Crew identification number linked to an external system.
Position	Crew Operational Position.
Team	Crew's assigned team.
Status	Embarkation Status.
Hrs Worked (ILO)	Actual hours worked. It sums up all worked hours regardless of work codes. The column is highlighted in red for Time Approval mode and the text is in red for Clock-In/Out mode when the total worked hours exceeds the value set in Parameter, **Time Attendance, ILO Maximum Work Hours in 24-hour period**
Hrs Worked (OT)	Actual hours worked. It sums up all work codes flagged with "Include into Working Hours". The total hours worked is used to calculate the Overtime against the contracted hours.
Hrs Scheduled	Hours scheduled by Manager. Sums up all hours regardless of work codes.
Variance	Differences between **Hrs Worked (ILO)** input by Crew at Time & Attendance Terminal and **Hrs Scheduled** by Manager, and only shown in Time Approval mode.
RH Blk1	Scheduled largest rest hours block.
RH Blk2	The second largest rest hours block in Time Approval mode.
Contracted	Contracted hours prior to overtime calculation in Time Approval mode.
Paid	An indicator of whether worked hours is paid in Payroll in Time Approval mode.
Crew Approved	Schedule approved by Crew at T&A Terminal.
Mgr Approved	Schedule approved by Manager.
Non-Compliant Reason	Non-compliant schedule reason approved by Manager.
Off Day Reason	Reason entered by the crew at T&A Terminal when approving zero hours worked or when Manager approves crew zero hours scheduled.
Last Scheduled	Date of last scheduled in Time Approval mode.

Below are the formulas to calculate the rest hours in two different scenarios.

- If there is no schedule on the previous day, the system calculates the rest hour from today's first start time and ends at the same start time the following day, for a period of 24 hours. For example, Time Slot 1 Start Time at 06:00 hours. The system calculates rest hours from today 06:00 to the following day at 06:00.

  Therefore, 2(10:00 - 12:00) + 3.5(14:00 - 17:30) + 7.5(22:30 - 06:00) = 13.RH Blk 1 = 7.50, RH Blk 2 = 3.50, Total RH = 13

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- If there is a schedule on previous day, the system calculates the rest hour from end time of previous day and ends at the same end time of today, for a period of period 24 hours. For example, Time Slot 3 End Time at 22:30 hours. The system calculates rest hours from previous day 22:30 to today's 22:30.

  Therefore, 7.5 (22:30 - 06:00) + 2 (10:00 - 12:00) + 3.5 (14:00 - 17:30) = 13.RH Blk 1 = 7.50, RH Blk 2 = 3.50, Total RH = 13.

To view the start/end time of each time slot,

1. Select the date from the Calendar Editor in the Roster Daily.
2. Go to the Daily Overview tab and double-click the crew name to open the Roster Daily Schedule window.

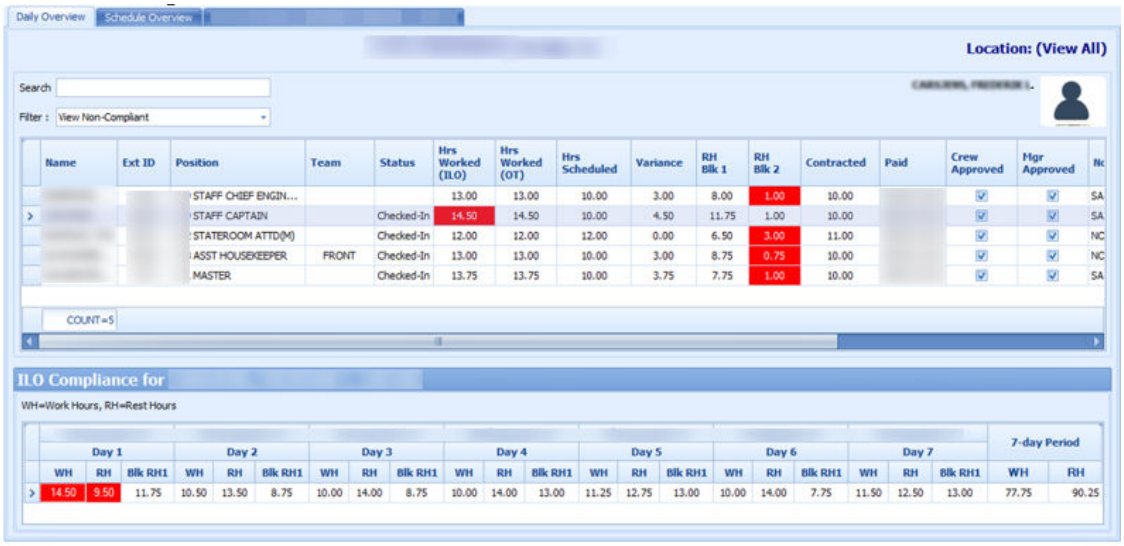
Figure 8-11 Roster Daily Schedule



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ILO Compliance

Figure 8-12 ILO Compliance in Daily Overview



At the ILO Compliance section, the system automatically sets the columns in red when daily worked/rest hours violates the ILO Regulation. The hours shown in Worked Hours (WH) and Rest Hours (RH) are the accumulated daily worked/rest hour.

Selecting a crew will display the total WH and RH for seven-day period in the **ILO Compliance** section.

Modifying Roster Daily Schedule

The system allows you to modify a roster schedule created from the template by removing or adding new time slots. You are not allowed to modify or delete the schedule if the Roster has been paid through payroll. This function is only accessible by users that are granted with access rights **"#3292 – Allow to Create & Modify Roster Schedule"**.

In the Roster Daily Schedule window, select the **time slot** checkbox, enter the **roster task, start/end time**, and the **sub location**, and click the **Save** button. See Roster Daily Schedule.

Copying a Roster

1. In the Roster Daily window, select the **date** from the calendar editor.
2. In the Daily Overview tab, select the **crew record** from the grid.
3. At the Menu option, click the **Schedule tab** and then click the **Copy & Paste** button to copy the schedules to other dates.
4. At the confirmation prompt, read the message prompt and then click **Yes** to proceed.
5. The system prompts a calendar editor when you select **Yes** at the confirmation prompt. Select the **date** to paste the copied schedule.
6. Click **OK** to complete the process.

Removing Roster Daily Schedule

You can delete the schedule that you no longer need from the Roster Daily Schedule.

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1. From **Daily Overview** window, double-click the crew schedule to open the **Roster Daily Schedule** window.
2. Deselect the **Timeslot checkbox** to remove the time slot(s).
3. You can also click the **Delete** button under the Edit tab from the Menu option to remove the schedule for the day.

Schedule Overview

The Schedule Overview displays the crew schedules in a graph view, based on the following options and as shown in below figures.

Figure 8-13 Schedule Overview by Date

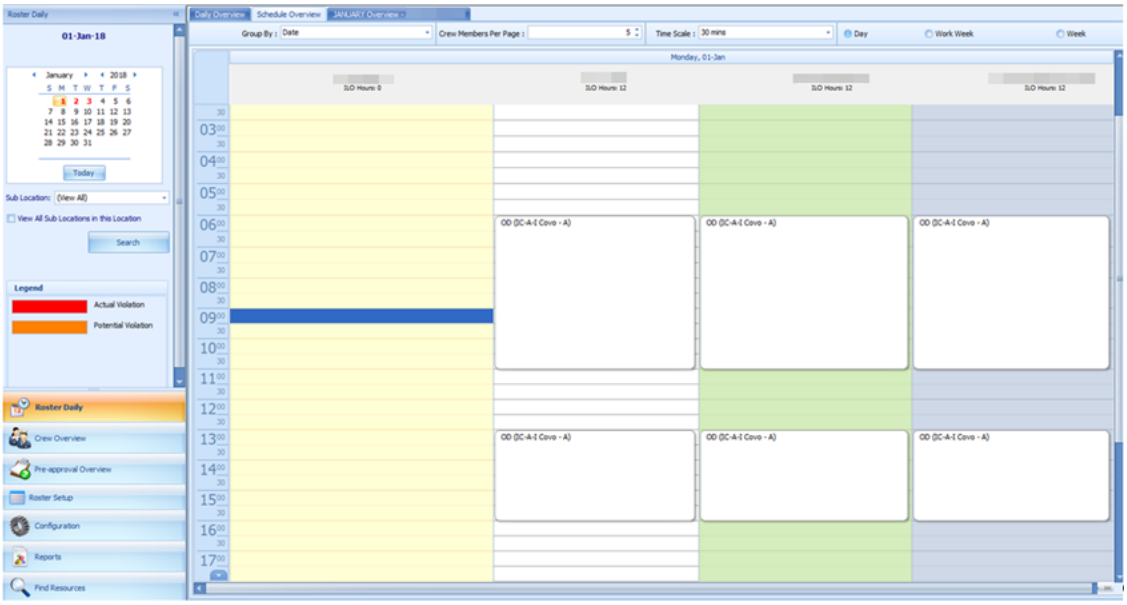
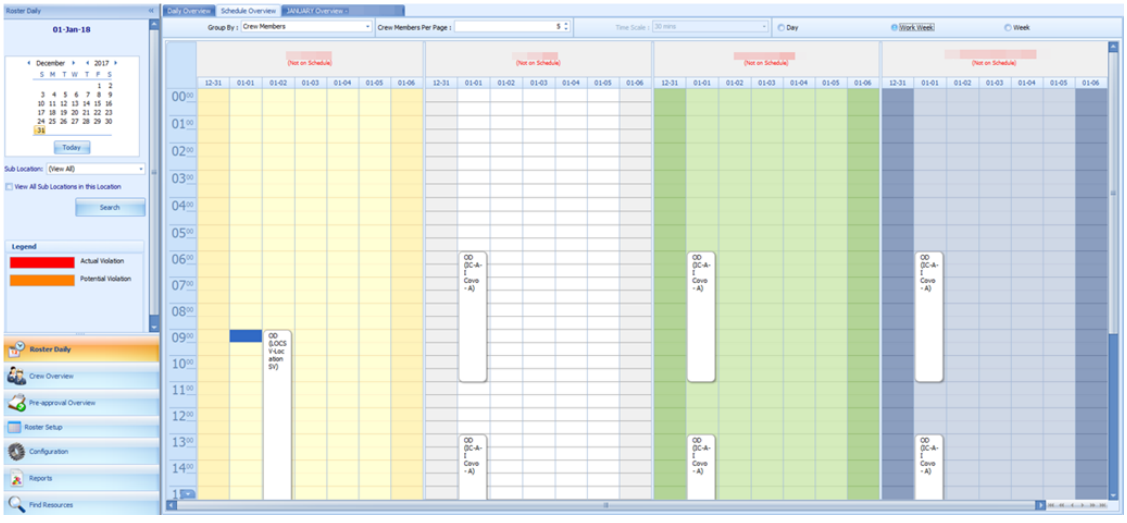


Figure 8-14 Schedule Overview by Crew Members



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Group By:

- **Date:** Displays schedule by date.
- **Crew Member:** Displays schedule by Crew Member.

Crew Members Per Screen:

- Displays schedule with the number of members defined.

View:

- **Day View:** Displays schedule by day.
- **Work Week:** Displays schedule by the work week.
- **Week:** Displays schedule by week.
- **Month:** Displays schedule by month.

Time Scale:

- Displays the hour in 15 or 30 minutes block.

Creating a Roster Schedule in Schedule Overview

A schedule can be added into the **Schedule Overview** tab using the drag and drop option or from a context menu.

Adding Schedule Using Context Menu

1. At the crew name, select the **time slot** from the grid.
2. Right-click to open the context menu.
3. Select the **task** to add the schedule. This creates the bar graph in the Overview tab.

Adding Schedule Using Time Slot

1. At the hour grid of the crew, double-click to open the **Time Slot** window.
2. Select the **Roster Task, Sub-Location** from the drop-down list and insert a comment, if any.
3. Select the **Start** and **End Time** for the task.
4. Click **OK** to save. The system prompts:
    - An ILO Violation if the schedule hours is more than the allowed ILO hours per day
    - An Overlapping of Time Slots warning if the schedule is overlapping with others

Modifying a Roster Schedule

1. In the Schedule Overview window, double-click on the selected **time slot**.
2. Modify the necessary information and then click **OK** to save.
3. You can also select the time slot and then drag the end/start time to extend or shorten the schedule or move the entire time slot to a different start/end time.

Removing a Roster Schedule

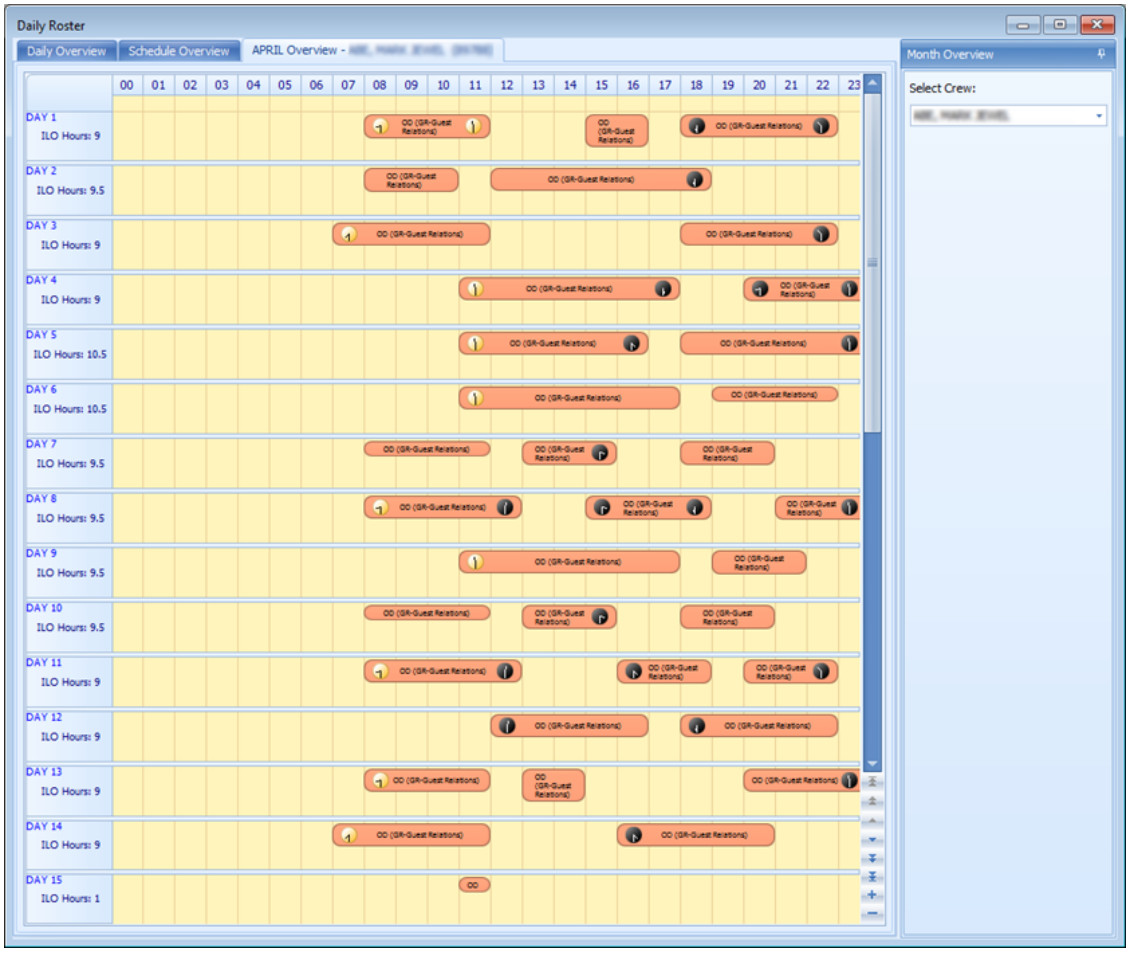
- To delete an individual time slot, right-click the time and then select **Delete** from the options menu.
- To delete all time slots, right-click on the schedule and select **Delete All Time Slots** from the options menu.

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Monthly Overview

The Monthly Overview window provides an overview of the crew monthly schedule.

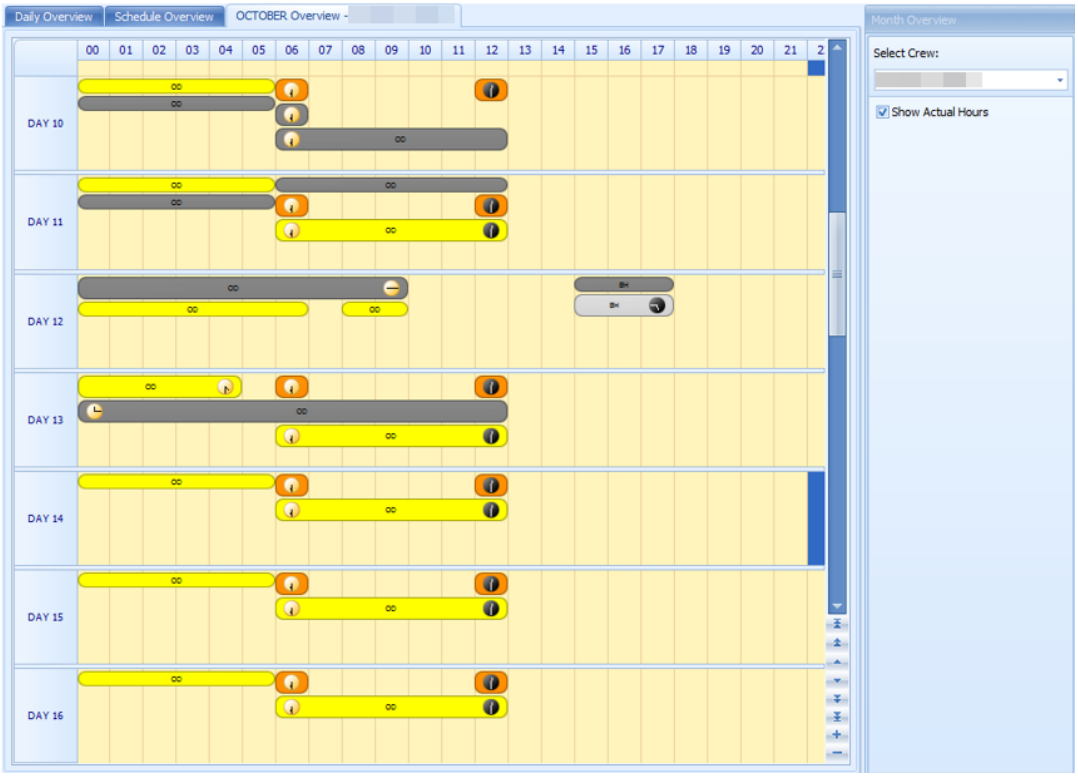
Figure 8-15 Monthly Overview



1. From the Roster Daily, Calendar Editor, select the month to view.
2. In the Daily Overview tab, select a **crew** and then navigate to the Monthly Overview tab to view the selected crew monthly schedule.
3. To view another crew for the same month, select the **name** from the drop-down list. You can only select one crew at any given time.
4. In the Monthly Overview tab, the same function as the Schedule Overview applies where you are allowed to add, modify, remove or paste a roster schedule.
5. If the Time Attendance, Use Clock-In/Clock-Out parameter is enabled, the View Clock-In/Out menu button and Show Actual Hours checkbox will be available.
6. Select the **Show Actual Hours** checkbox to show the crew actual clock-in/clock-out hours on the grid. The actual hours appear in grey color for each time slot.

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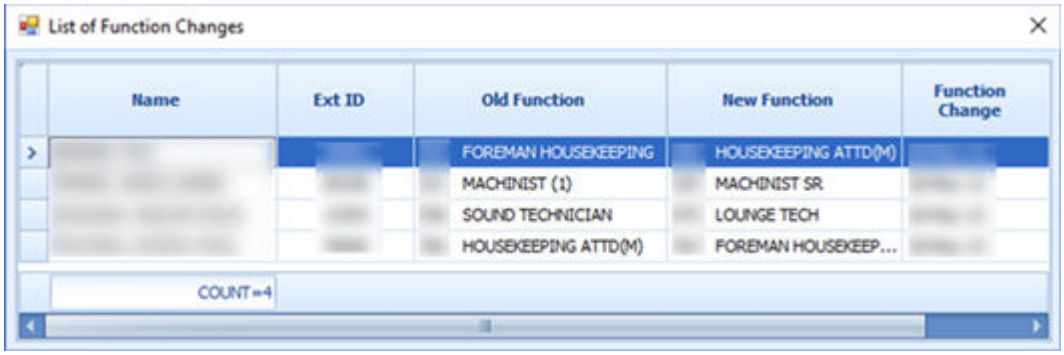
Figure 8-16 Monthly Overview Actual Hours View



Function Change

The Function Change feature is an information window that lists all the position changes and the dates they were changed. The fields are not editable.

Figure 8-17 List of Function Change



Reset Pincode

The Reset Pincode allow the manager to reset the crew pin code without logging in to the Crew module. The manager must be granted with privilege rights **#4662 – Reset Pincode**.

When resetting a pin code:

- You can only reset one pin code at a time.

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- The pin code is updated to Null in RES_PIN_CODE or RES_PIN_ENCRYPTED based on the Pin Code Encryption parameter and prompts the crew to input a new pincode at login.

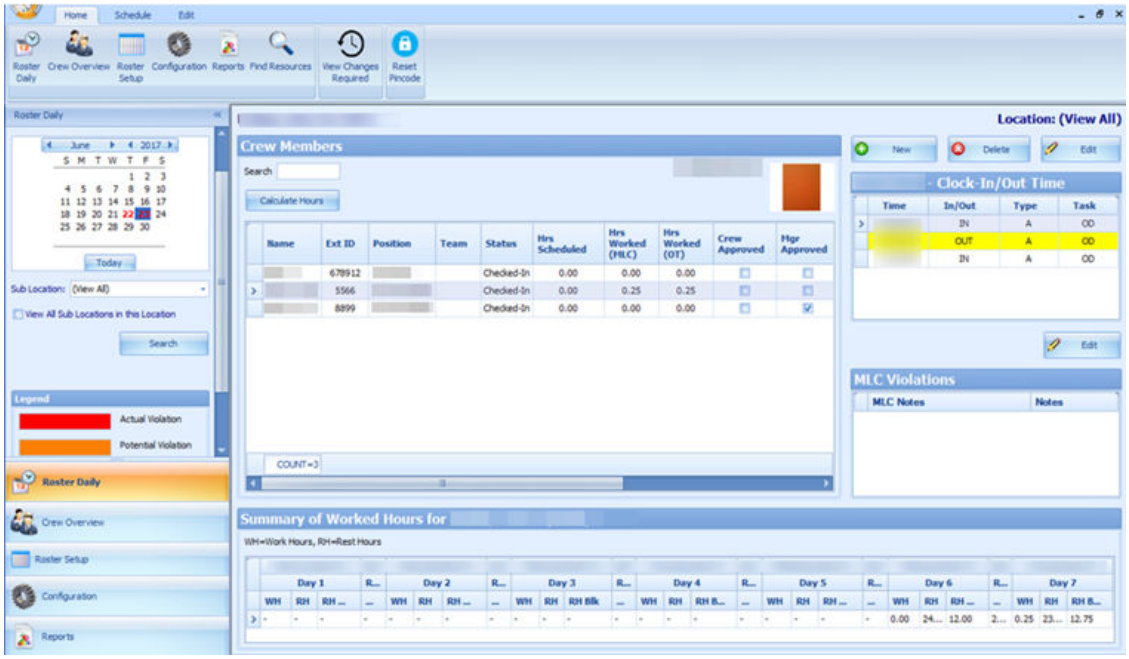
To reset a pin code, select a crew from the Crew Overview and click **Reset PinCode** at the ribbon bar.

Clock-In/Clock-Out

This feature tracks the Crew Work Hours according to the ILO requirements. The function requires crew members to clock in/out at the start and end of their shift or when they are off for a break.

Daily Overview

Figure 8-18 Clock In/Out Daily Overview



The **Daily Overview** window is divided into the following multiple sections:

- **Calendar:** Dates marked in red denotes dates with roster schedules created
- **Overview Tab:** Lists all crew members that haves schedule on the selected date
- **Clock-In/Out Time:** Clock-In/Out time recorded by the system
- **ILO Violations:** Violations of work hours if any. Refer to the Legend indicators for type of violations
- **Summary of Worked Hours:** A weekly summary of hours worked or rested

Viewing of Crew Schedule

1. Select the date using the **Calendar** editor and the **Sub-Location** from the drop-down list.
2. Click **Search** to refresh the window.
3. In the **Crew Member** section, a list of crew matching the search criterion appears.

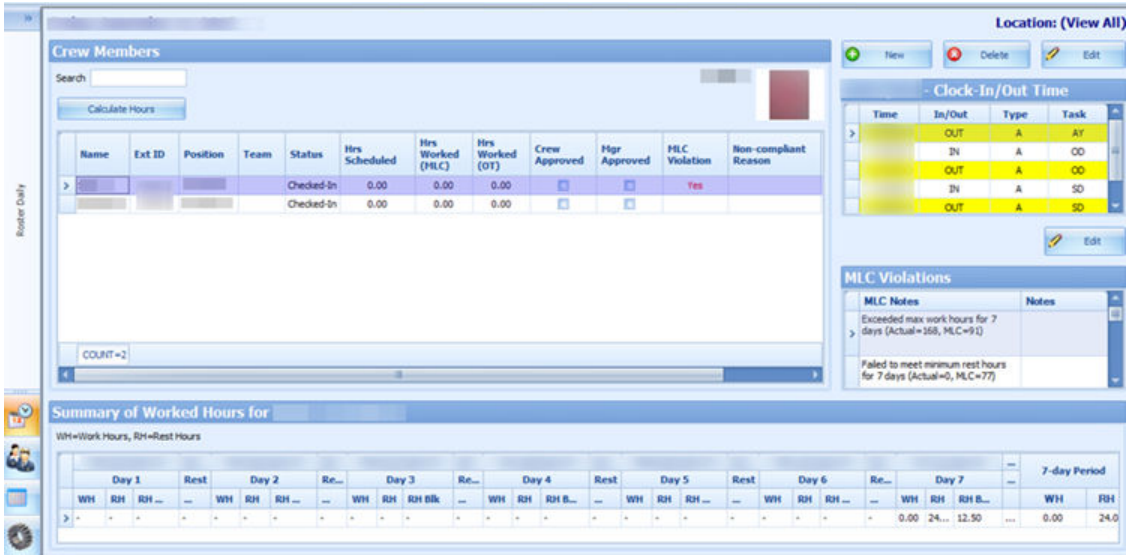
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4. Select a crew name and click **Calculate Hours** to refresh the information shown.
   a. At the **Clock-In/Out Time** section, the time logged for each task is shown.
   b. In the **Summary Worked Hours** section, the past week hours worked/rested is visible.
   c. If the crew work hours violates the ILO Compliance, a note is added to **ILO Violations** section.

See Table 8-3 description in Time Approval Method section.

Approving/Disapproving Crew Daily Roster

Figure 8-19 Crew Schedule Approval



Each crew is responsible in approving the daily schedule at the T&A Terminal before the manager approves and submits the schedule to Payroll for calculation. At the point of the manager's approval, the system checks the following and:

- Allows an approval of past dates schedule or a day before yesterday's date.
- Only allows approval of yesterday's schedule if the past value is defined in **Parameter, Time Attendance, Daily Work Time Approval**. Or the schedule is approved by the crew.
- Prohibits approval for today or future crew schedules.

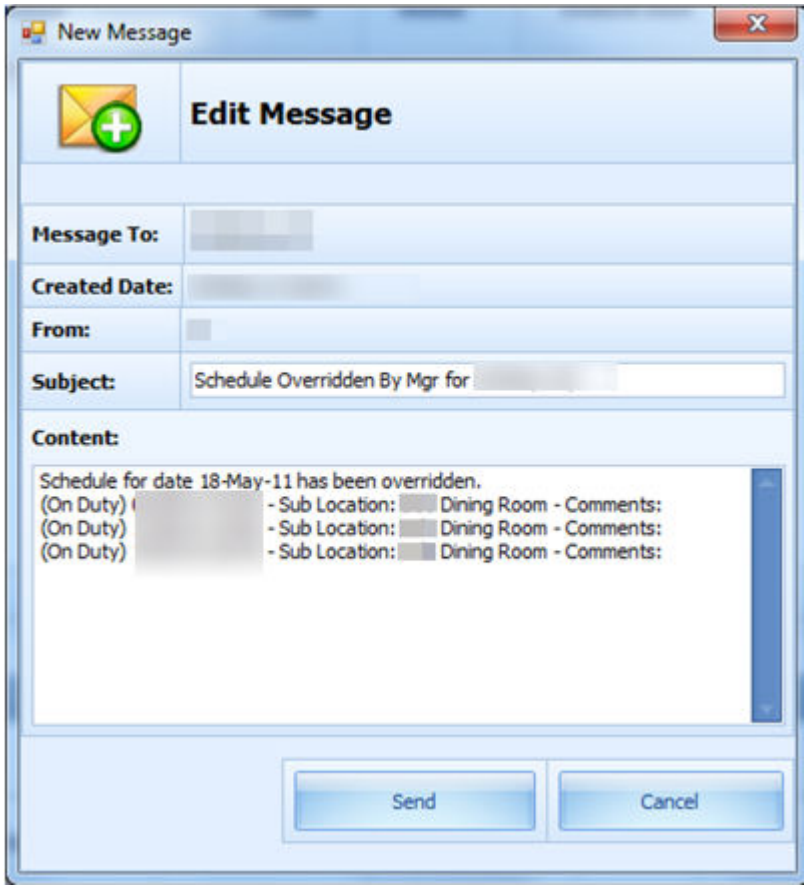
1. At the Roster Daily window, go to the Schedule tab.
2. Select the **date** to approve using the calendar editor and click **Search**.
3. At the Crew Members section, select a crew name. Multiple selections are allowed.
4. Click **Approve** or **Approve All** (for multiple selections)at the ribbon bar.
5. At the confirmation prompt, select **Yes** to proceed.
6. After the schedule is approved, the **Mgr Approved** column is checked. If **Crew Approved** column is checked, this means the schedule is approved by the crew.
7. Click **Unapprove** or **Unapprove All** (for multiple selections) to reverse the approval.

Below are the processes during approval:

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- The system generates a notification message informing the crew of the schedule approval/ unapproval
- If the schedule is approved by the crew and changed by the manager, the crew is notified with a system generated message, indicating the reason for the change

Figure 8-20 Schedule Change Notification

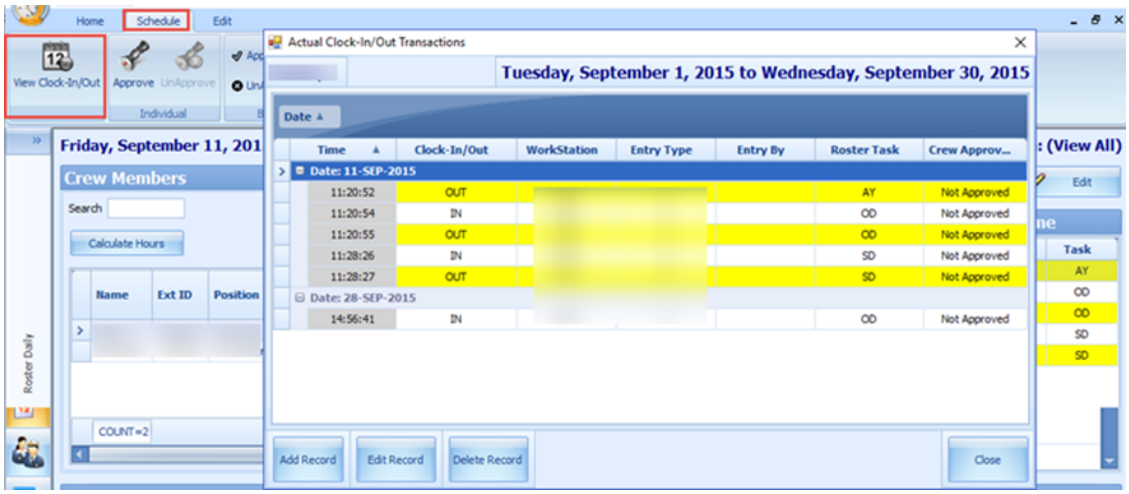


- When the manager approves a schedule not yet approved by the crew, the system generates a warning message, notifying the crew of the change.
- When approving a non-compliant schedule, the system prompts you to enter a Non-ILO Compliant Reason.
- If the approval is for zero hours and yet to be approve by the crew, the system prompts for a **Zero Hours Recorded** reason to be entered. This also applies to a schedule change from worked hours to zero hours that has been approved by crew and manager.

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Editing Clock-In/Clock-Out Time

Figure 8-21 Clock-In/Clock-Out Transactions



The system permits you to edit the clock-in/out time if needed using the following steps:

1. Go to the Schedule tab and click the **View Clock-In/Out** button at the ribbon bar.
2. At the Actual Clock-In/Out Transactions window, select a record to edit.
3. Click the **Edit Record** button, alter the necessary details, and click **Save**.
4. You can also click **Add Record** to insert a new clock-in/out record. The "Entered by" column is empty if the record is added/edited by the crew. Otherwise, the column displays the user name.
5. Click the **Delete Record** tp prompt a confirmation window. Click **Yes** to proceed or **No** to return to the previous window.

To manually add a record, see: Manual Clock-In/Clock-Out.

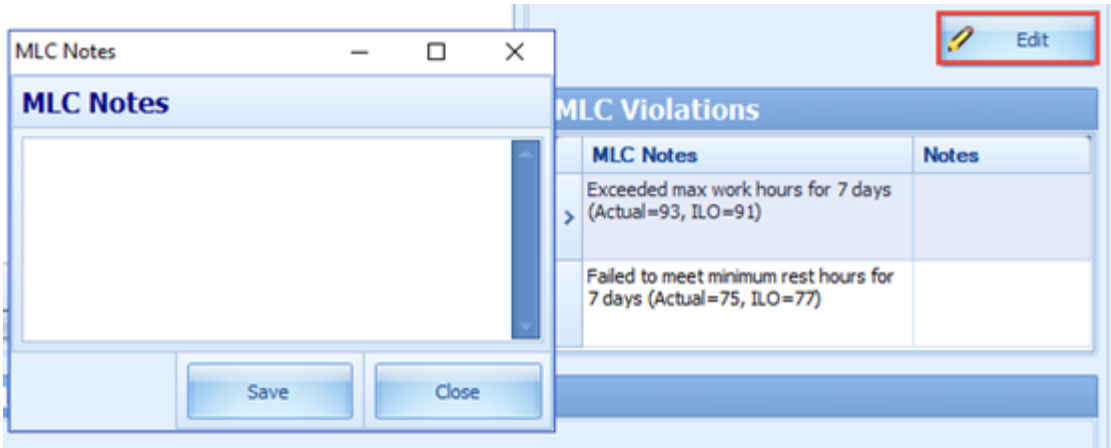
Editing ILO Violations

The edit function in International Labour Organization (ILO) Violations enables the manager to view and input or edit the MLC notes.

To edit, click the **Edit** button and enter **MLC Notes** in the **MLC Notes** window and click **Save** to update.

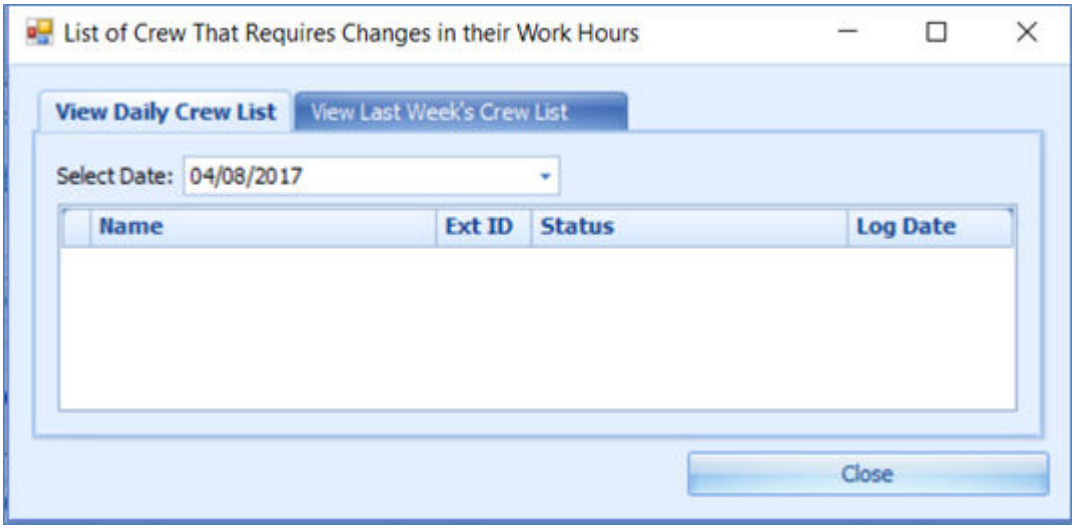
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Figure 8-22 ILO Violations



View Changes Required

Figure 8-23 Crew List Requesting Work Hour Change



The View Changes Required function lists all changes requested by crew through the Time and Attendance Terminal, and the function is only accessible by the manager. A change request is generated when the crew presses **Changes Required** during Clock-In/Out at the Time and Attendance Terminal, Crew members are to discuss the change with their respective manager. It displays the daily/weekly or both daily/weekly request depending on the value defined in the Approved Weekly Hours parameter and/or the Approve Daily Worked Hours Clock-In/Out parameter.

To access this function, click the **View Changes Required** button on the ribbon bar. The information displayed on this window is a view only. See Editing Clock-In/Clock-Out Time or Manual Clock-In/Clock-Out section on how to change the information.

Reset Pincode

To reset a pincode, see Reset Pincode in Time Approval Method.

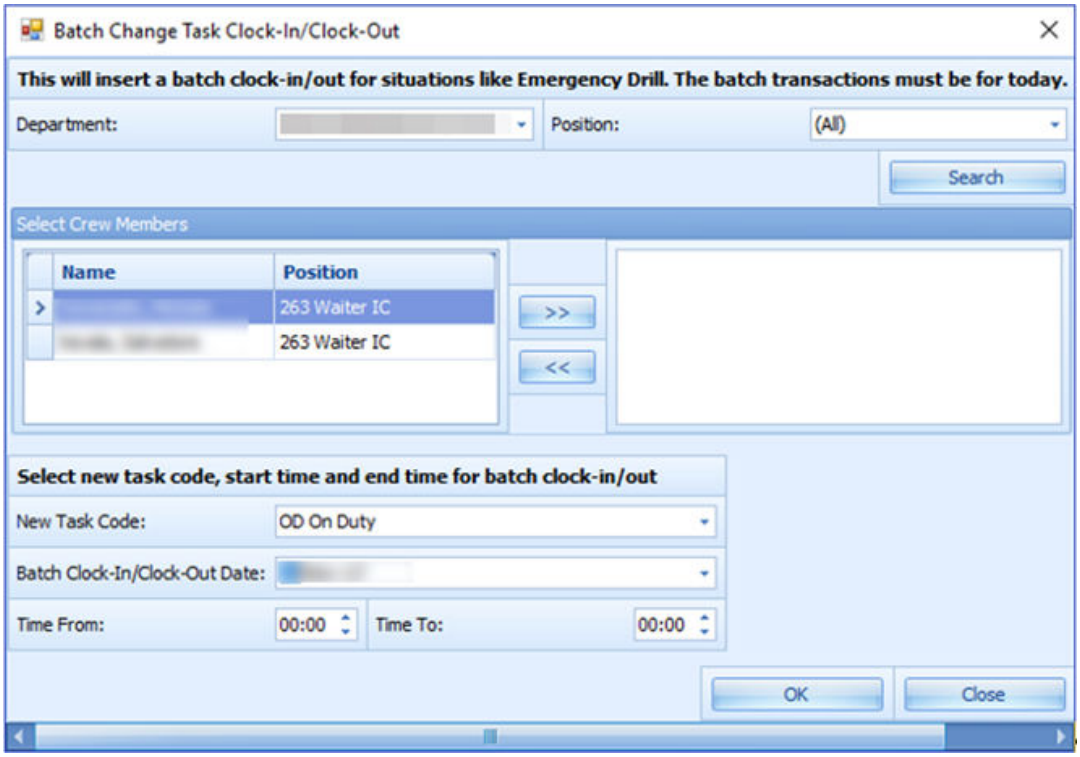
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Batch Clock-In/Clock-Out

The Batch Clock-In/Out function allows the manager to perform a batch clock-in/out for the crew on selected tasks such as fire or emergency drill, based on the parameter set in Enable Batch ClockIn/Out. Use of this function is only permissible for users granted with privilege access #4686 - Batch Clock-In/Out. You can only post the batch clock-in/out for tasks past the server time and on the current system date.

1. At the main window, navigate to the **Schedule tab** and click the **Batch Clock-In/Out** button from the ribbon bar.
2. In the Batch Change Task Clock-In/Out window, select the **Department** and **Position** from the drop-down list, and click **Search**.

Figure 8-24 Batch Clock-In/Out Task



3. At the Select Crew Members section, a list of crew matching the selection is shown. Select the names and click the double right arrow.
4. Select the **New Task Code, Batch Clock-In/Out Data** and **Time** range from the drop-down list.
5. Click **OK** to post the clock-in/out.

Below are the processes perform by the system automatically for the batch clock in/out.

- For crews whose last transaction was a clock-in, the system performs:
  1. Clock-out with the task code that corresponds with the previous clock-in.
  2. Clock-in with the specified task code.
  3. Clock-out with the specified task code.

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4. Clock-in with the task code that corresponds with (i) and the time is 1 minute after the batch clock out time.

- For crews whose last transaction is a clock-out, the system perform
  1. Clock-in with the specified task code.
  2. Clock-out with the specified task code.

Manual Clock-In/Clock-Out

You can manually enter a clock in/out in the In Clock In/Out mode. To access this function, go to the Roster Daily, Crew Members screen, Location (View All) section.

1. Click **New** at the Location (View All) section.
2. At the Add Record window, select the **Time, Clock-In/Out and Roster Task** from the drop-down list, and click **Save**. The manually added Clock-In/Out time are classified as “M” type.
3. The system prompts a warning message when a manual clock-in/out is entered. The warning message defers, depending on the previous activity log. The system does not prevent an entry from being inserted or override the previous entry. It is strongly recommend that you read the warning prompt before clicking the **OK** button.

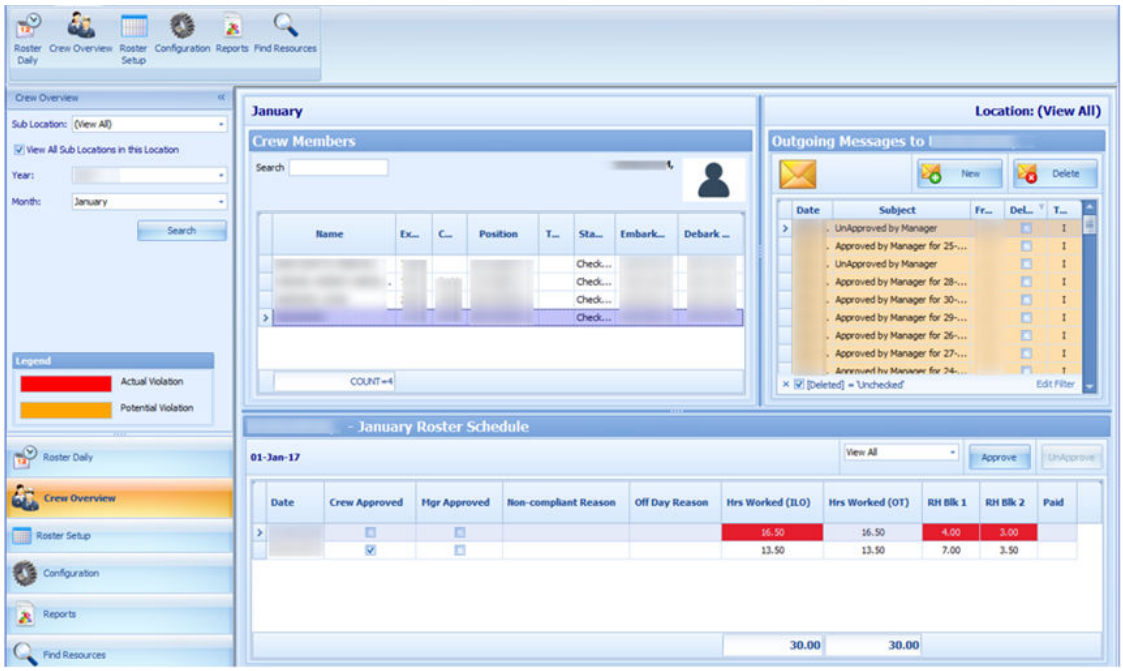
Crew Overview

The Crew Overview window displays the crew member’s information, messages for the crew and the crew roster schedule.

Time Approval Method in Crew Overview

Crew Members Search

Figure 8-25 Crew Overview in Time Approval Method



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1. At the Crew Members Overview pane, select the **Sub-Location**, select the **Year and Month**, and then click **Search**.
2. At the Crew Members section, select the crew to display.
3. Enter either the crew **Last name** or **external ID** in the Search field to narrow down the search.

Roster Schedule

The Roster Schedule displays the crew monthly roster, enabling approval or disapproval of schedules. Creating and modifying of schedule is allowed in this function.

Figure 8-26 Roster Schedule in Time Approval Method



Below are the available fields in Crew Overview, Roster Schedule.

Table 8-4 Roster Schedule Field Description

Field Name	Description
Date	Displays the scheduled date
Crew Approved	Schedules approved by Crew at T&A Terminal
Mgr Approved	Schedule approved by Manager
MLC Violation	Hours Worked (MLC). The label is configured in Administration module, System Setup, Labels Setup, TATE17.
ILO Violation	The default label is ILO. The label is configured in **Administration, System Setup, Labels Setup, TATE17.**
Non-complaint Reason	Approval reason for non-compliant schedule.
Off Day Reason	Approval reason for zero hours schedule.
Hrs Worked (ILO)	Total hours scheduled per day. The column is highlighted if the total hours scheduled exceeds the value set in Parameter, **“Time Attendance”, ILO Maximum Work Hours in 24-hour period.”**
Hrs Worked (OT)	Total hours scheduled for work codes that are flagged with “Include into Working hours”.
Rest Hour Block 1	The biggest rest hour block. The column is highlighted as a violation if the total rest hour block is less than the value set in Parameter, “**ILO Minimum Block Rest Hours in 24-hour period”**. Available in Time Approval Mode.

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Table 8-4 (Cont.) Roster Schedule Field Description

Field Name	Description
Rest Hour Block 2	The second biggest rest hour block. The column is highlighted as a violation if the total rest hours per day is less than the value set in Parameter, “ILO Minimum Block Rest Hours in 24-hour period”. Available in Time Approval Mode.
Paid	In Time Approval mode, this column is called **Contracted**. It indicates whether the worked hours have been paid in Payroll.

Creating Roster Schedule

1. Search for the crew record.
2. At the **Roster Schedule** section, double-click the blank field to open the Time Slot window.
3. Select a new **Time Slot**, select a **Roster Task** and enter all necessary for that time slot.
4. Click **Save** to save the information and **Close** to exit the window and add the record to the **Roster Schedule** section.

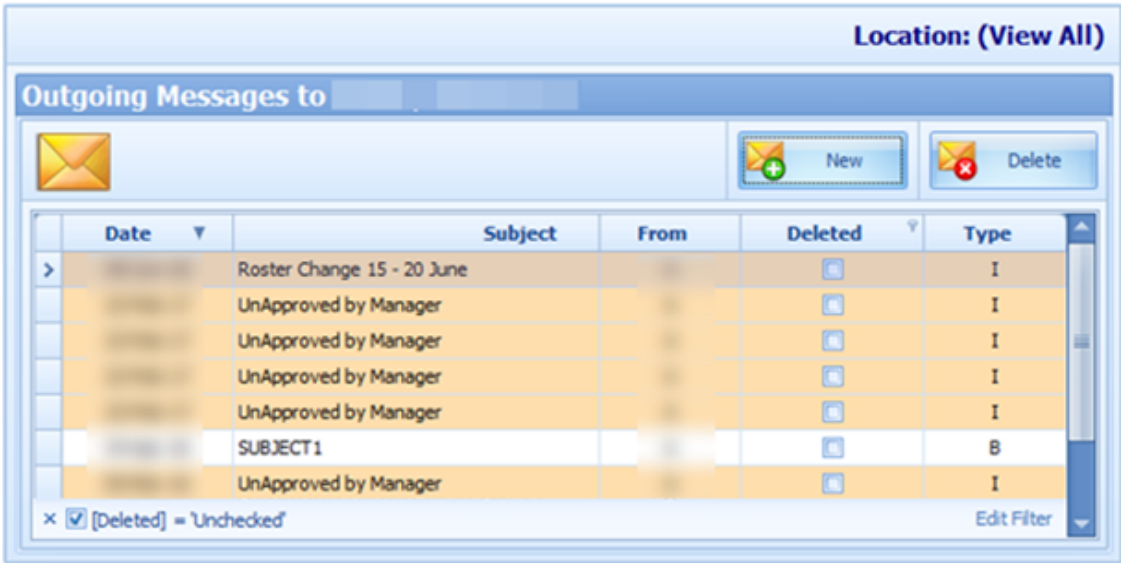
Messages

The Messages section displays all the crew messages whether it is read or unread. By default, the **Delete** filter is checked and deleted message are excluded from the list. To view the deleted messages, remove the filter.

The messages types are:

- I – Individual Message
- B – Broadcast Message

Figure 8-27 Crew Messages



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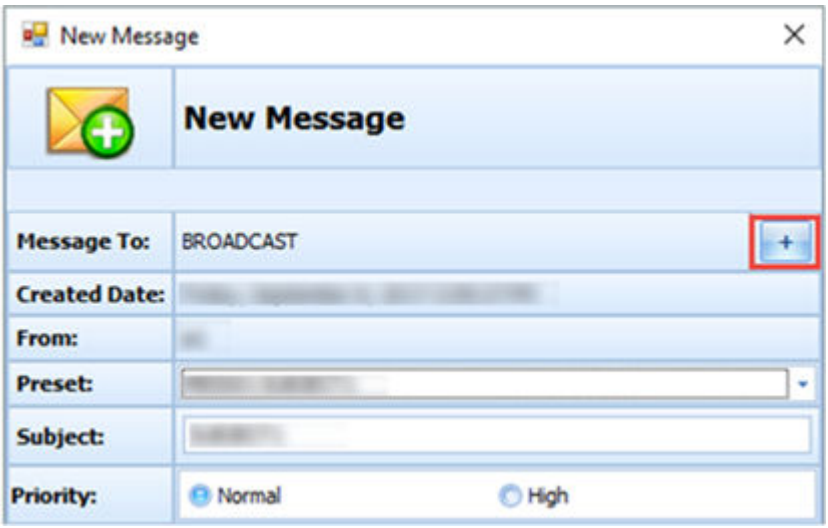
Creating a Message

1. In the Message section of the Crew Overview, click **New** or go to the Message tab and select **New** from the ribbon bar.
2. Enter the **Subject, Priority Level** and **content** of the message.
3. Click **Send** to send the message.
4. Click the **Delete** button to delete the selected message. You cannot delete messages created by other users, and deletion is only allowed if you are granted with privilege right #4472.

Creating a Broadcast Message

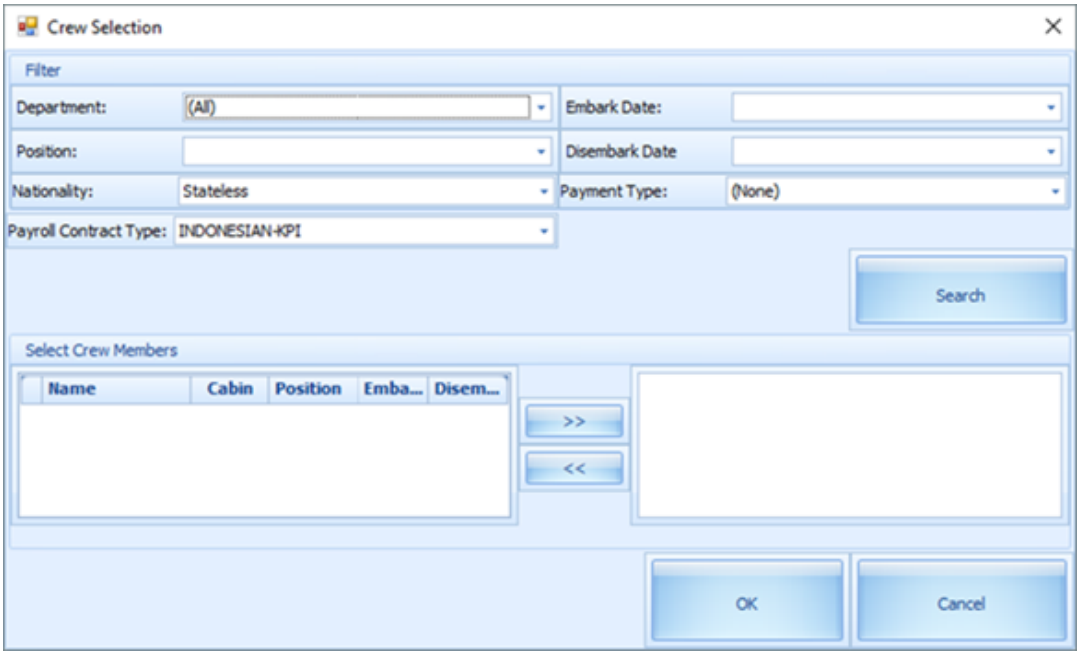
1. In the **Message tab** at the ribbon bar, select **Broadcast**.
2. Click the **"+"** sign at the MessageTo field to expand the Crew selection.

Figure 8-28 New Broadcast Message



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Figure 8-29 Broadcast Message Selection



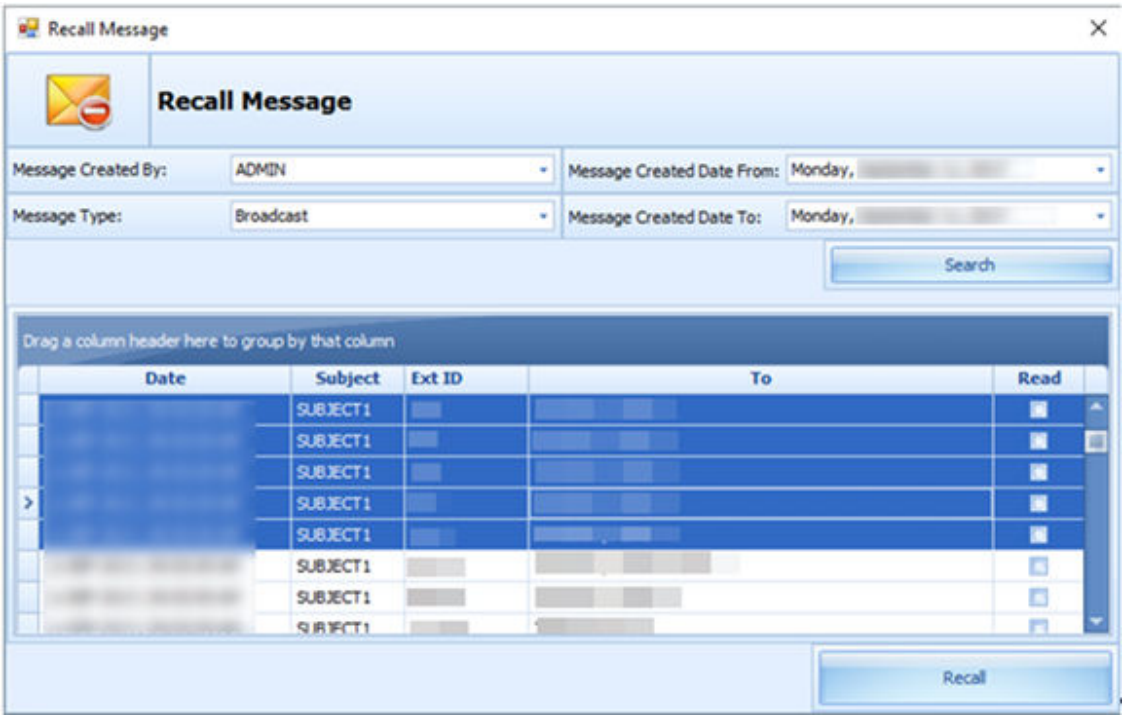
3. Select the **Department, Position, Embark Date,** and other required information from the drop-down list, and click **Search**.
4. Crew matching the criteria are listed in the **Select Crew Members** section. Select the crew name(s) and then click the **right arrow**.
5. Click **OK** to close the window and return to the New Message window.
6. At the New Message window, you can select a **Preset** message or enter your own, by inserting the **Subject Line** and message content.
7. Click **Send** to broadcast the message. The messages will prompt when the Recipient logs in to the Time and Attendance Terminal.

Recalling Message Broadcasted

You can recall messages that are sent accidentally. However, you cannot recall messages that are read.

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Figure 8-30 Recall Message Form



1. Click the **Recall** button at the ribbon bar.
2. In the Recall Message window, select the **Message Created By, Message Type,** and **Message Create Date From/To** from the drop-down list, and click **Search**.
3. Select the message(s) to recall and then click the **Recall** button.
4. At the confirmation prompt, click **Yes** to confirm the message recall.

Clock-In/Clock-Out Method in Crew Overview

The functions to search for the crew members are the same as the Time Approval Method. For more information, see: Time Approval Method Field Definition Table section.

Roster Schedule

The Roster Schedule function in Clock-In/Out mode is relatively similar to the Time Approval Method and has fewer fields in the grid.

For more information, see: Table Roster Schedule Field Description

Creating Roster Schedule

1. Search for the crew record.
2. Select the crew name from the **Crew Members** section.
3. Click the **View Clock In/Out** button at the **Schedule** tab to open the **Actual Clock-In/Out Transactions** window. For more information, see: Clock-In/Clock-Out
4. Select **Add Record** and enter all required information in the Add Record window.

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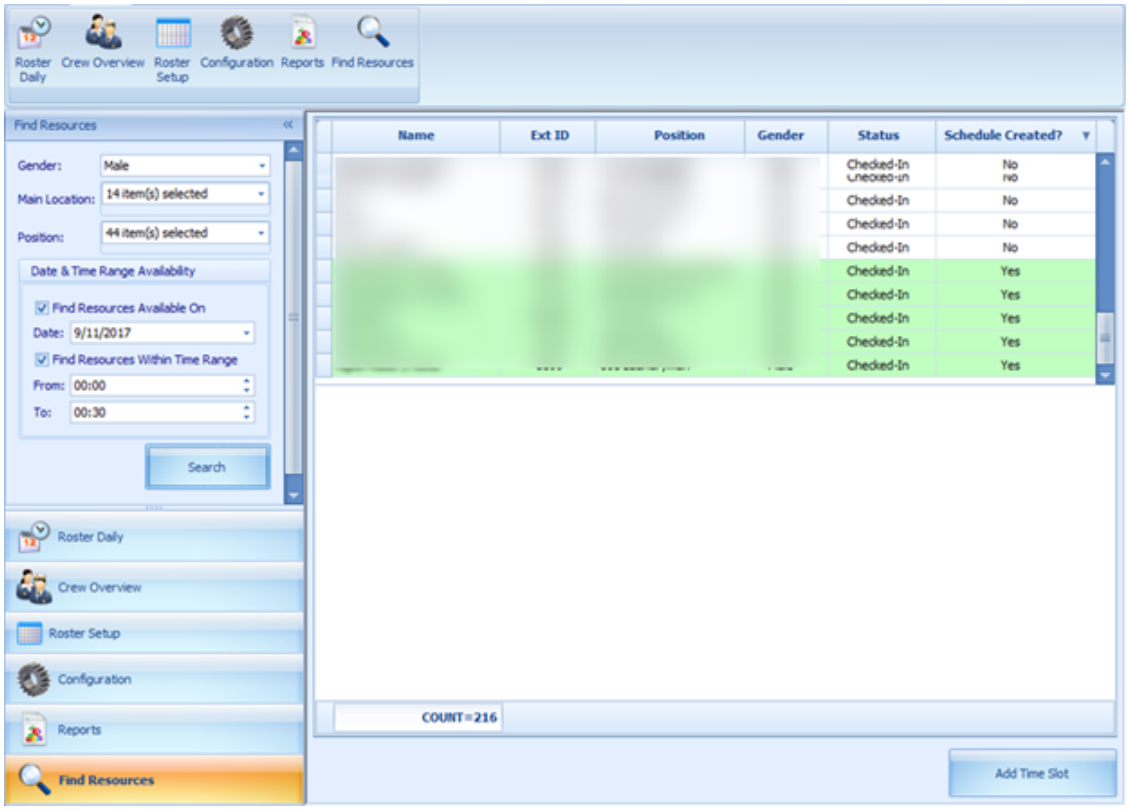
5. Click **Save** to save the information and then **Close** to exit the window. This adds the record to the **Roster Schedule** section.

Messages

The Messages function is the same as the Time Approval Method. For more information, see: Time Approval Method in Crew Overview

Find Resources

Figure 8-31 Find Resources Function



1. Click **Find Resources** from the ribbon bar.
2. Select the **Gender, Location, Position,** and **Date/Time Range Availability** from the drop-down list, and then click **Search**.
3. Results shown in the grid are non-violating ILO hours. Select the name of the crew from the results grid and then click the **Add Time Slot**. Note that you are only allowed to add time slot to the crew that has a schedule created.
4. In the Add Time Slot window, select the **Roster Task** from the drop-down list and then click **OK** to add.

Time Zone Change

The Ship's clock resets when the ship travels across different time zones. In order to accurately calculate the crew work hours and fulfill ILO Regulations, the time zone change must be set up. The time zones are set up in the *Administration module*.

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1. Log in to **Administration module, System Setup, Timezone Change Setup**.
2. At the **Timezone Change Setup** window, right-click and select **Add New**.
3. Enter the **Date, Time, Hours Zone,** and **Remarks** in the respective field, and then click **OK** to save.
4. Total worked hours recalculate automatically for rosters that falls within the time zone change when you navigate between windows.

With the time zone set up, work hours are recalculated and the differences are reflected in the T&A module when the Roster Daily has a start/end time falls between the time zone changes. For example, on 13th October at 02:00 hours, the time zone changed and crew worked from 00:00 to 06:00 hours. Therefore the total worked hours shown is 8 hours, as illustrated in the figure below.

Figure 8-32 Roster Daily Schedule for Time Zone Change

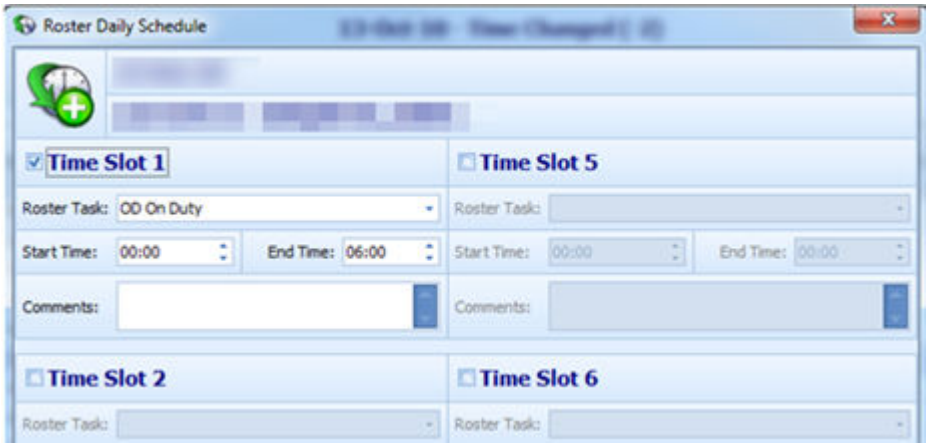
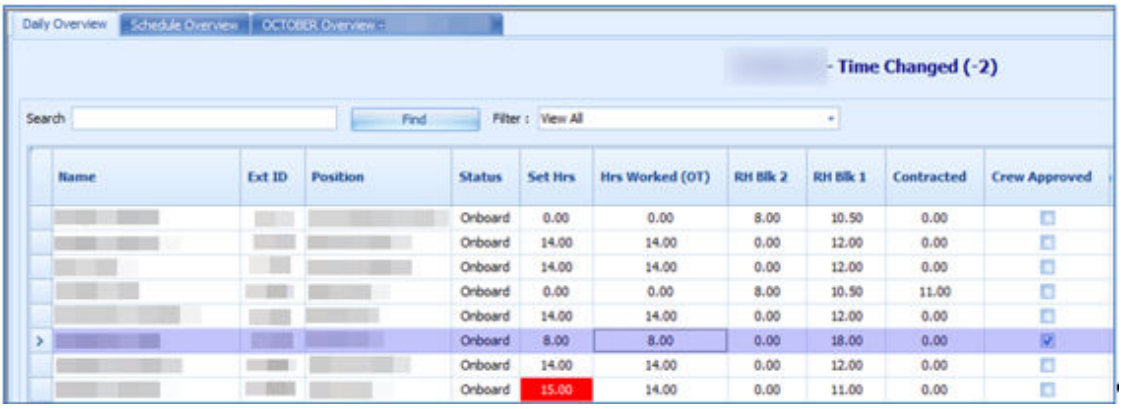


Figure 8-33 Recalculated Daily Hours in Time Zone Change



The above figure shows the recalculated “Daily Hours” of schedule that falls on a changed time zone.

At the T&A Terminal, the total hours calculated under the Approved Worked hours screen shows an 8 hours work, even though the start time is 00:00 and end time is 06:00.

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OHC TimeattendanceCalc

An interface was created to facilitate the calculation of total worked/rest hours separately from the T&A Terminal. This interface starts and runs in the background.

The recurring calculation process by x minutes is based on the value entered in **IFC Time AttendanceCalc process every X minutes** parameter and does not trigger a recalculation until the earlier calculation completes. At the end of the process, a log file is saved in `C:\Users\Public\Documents\Oracle Hospitality Cruise\IFCTimeAttendanceCalc_yyyymmdd.txt`.

Time and Attendance Terminal Module

The Time and Attendance Terminal (T&A Terminal) module provides functionalities used by the crew, such as clock-in/clock-out from their daily task, approve weekly worked hours, view weekly roster, request roster change, change pin code, and many more.

Parameters

See the Parameters section for its usage and control.

Login to T&A Terminal

A crew can log in to the T&A Terminal by swiping the crew card or by entering the crew ID, and a PIN code. One can obtain the PIN Code from **Edit Crew, Reservation details, Pin code**.

1. In the T&A Terminal, swipe the crew card through the Magnetic Card Reader (MSR) attached to the terminal to log in.
2. Enter the Pin code in the **PIN Code** field and then press **Enter**. The system does not prompt an error if the Pin Code entered is incorrect.
3. Pressing the **ESC key** resets the entries.
4. Alternatively, you can also enter the Crew ID in the **Enter Crew ID** field, followed by the **Pin Code**, and press **Enter**.
5. The system prompts for a PIN code to be created if the crew account does not have a PIN code. Enter the **Crew ID, New PIN Code** and confirm the PIN Code, and then press **Create**. Use the **CLR** to clear the entry and **BK** to backspace.
6. You must log in again after the PIN Code is changed successfully.

No Pin Code Detected

The PIN Code length is configurable in the **General, Pin Code Length** parameter and it prompts an error message if the PIN Code entered does not meet the requirement set in this parameter.

Crew Messages

After a successful log in and if there are unread messages, a message appears onscreen. Press **Mark As Read** to close and go to the next message, or go to **Delete Message** to delete the current message.

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Main Menu

After a successful log in, you must access two functions available in the T&A Terminal. The function listed on the Main Menu may vary depending on the mode set in the Time Attendance, and Use Clock-In/Clock-out parameter.

See the following table for a list of functions available in each mode.

Table 8-5 T&A Terminal Functions

Time Approval Mode	Clock-In/Clock-Out Mode
Approved Worked Hours	Clock In
View My Schedule	Clock Out
View My Messages	Change Task
View My Account	Manual Clock In/Out
View My Upcoming Drills	View My Schedule
Approve My Weekly Hours	View My Messages
Change Pin	View My Account
More Info	View My Upcoming Drills
Logout	View My Daily Hours
Exit Terminal	View Current Week Hours
	Approve My Daily Hours
	Approve My Weekly Hours
	Change Pin
	More Info
	Logout
	Exit Terminal

T&A Terminal -Time Approval Mode

Approved Worked Hours

All crews must approve their previous day's schedule daily before the approval cut off time defined in the Time Attendance, Daily Work Time Approval parameter. For example, the parameter value is set at 1000, which means the cut off approval time is 10:00 a.m. daily. Therefore, when a crew logs in after 10:00 a.m., the crew cannot modify or approve the schedule.

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Figure 8-34 Worked Hours Approval

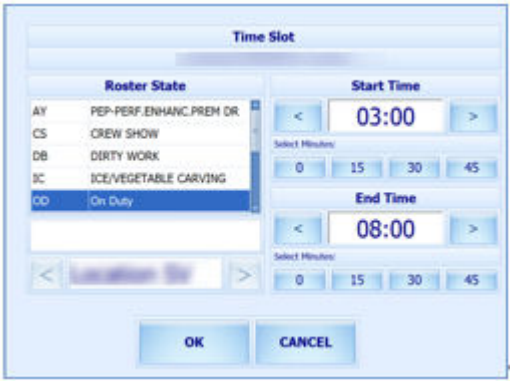


Table 8-6 Field Definition of Approved Worked Hours Screen

Field name	Description
Hours Worked	Indicates the total actual worked hours for the day.
Hours Scheduled	Indicates the total hours for the day scheduled by the manager.
Status	Indicates the status of the schedule.

1. Press the **Approve worked hours** to show the previous day schedule.
2. To add or edit the existing time slot, press the **ADD** or **Edit** button.
3. At the Time Slot screen, select a **Roster State**, the **Start/End time**, and **Sub-location**. When selecting the time, use the left or right arrow button to decrease/increase the hours, each slot is a 15 minute block. You can use the arrow up/down keys on the keyboard to increment or decrement the minutes in the block. Pressing any other keys will increment the time by a 15 minute block.

Figure 8-35 Add Time Slot Window

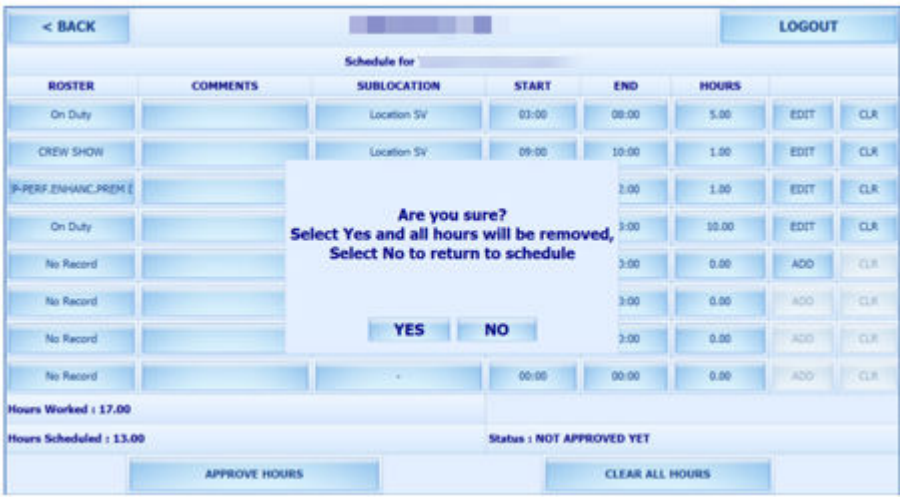


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4. Press **OK** to save and return to the previous screen.
5. Pressing the **Clear all Hours** resets the daily roster.

> **Note**
>
> When adding/editing the time slot through T&A Terminal:
>
> - Overlapping start/end time is not permitted.
> - The system does not perform an ILO Compliance validation.

Figure 8-36 Schedule Work Hours Window



6. At the **Schedule Work Hours** screen, press the **Approve Hours** to confirm or approve the worked hours.

> **Note**
>
> Crew can modify the schedule prior to manager's approval or log in before the specified work time approval. A schedule that is approved by crew can be modified by the manager at any time and not vice versa. Both the Approve Hours and Clear All Hours are dimmed after the schedule is approved by a manager.

Approve Weekly Hours

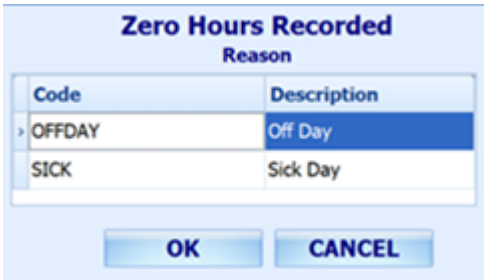
At the T&A Terminal, crew are allowed to approve their weekly schedule if the Time Attendance, Approval Frequency parameter is the same day as the server day is set to one. Once set, the system prompts the Weekly Schedule for your approval when you log in.

To approve the weekly schedule, press the **Approve** button. If a change is required, press the **Change Required** button to close the screen, and discuss the change with your manager.

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Approving Zero Hours

Figure 8-37 Zero Hours Reason

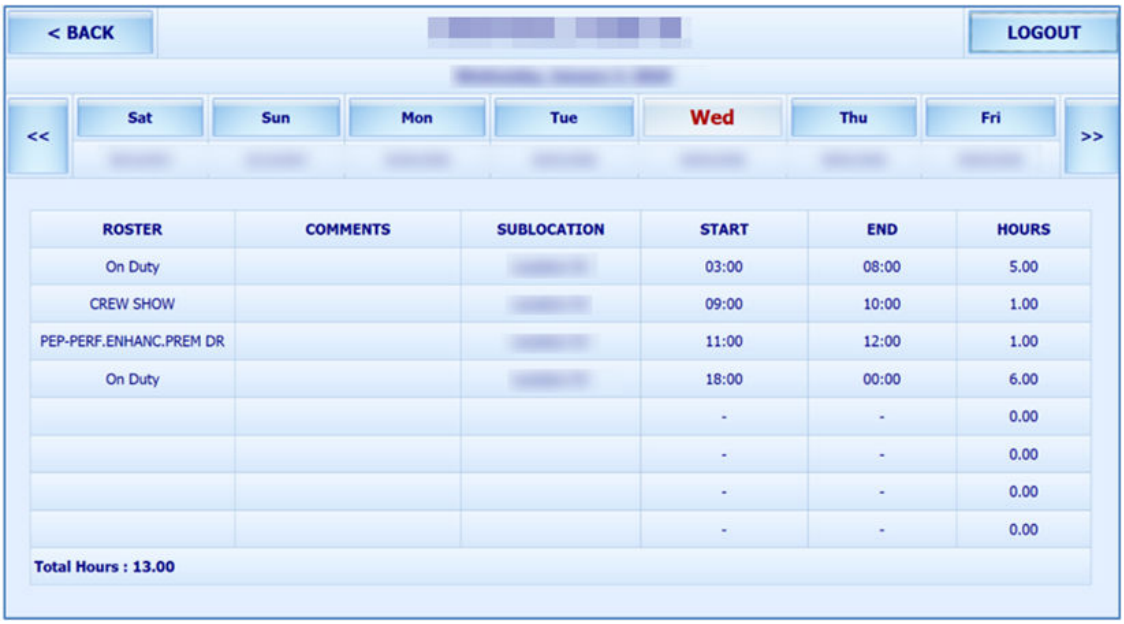


Crew is required to approve their zero work hours such as day off or sick day.

1. Once the **Approve** button is pressed and zero worked hours is detected, the system prompts an input screen for you to enter a reason.
2. Select the reason and then press the **OK** button to confirm.

View My Schedule

Figure 8-38 View My Schedule Window



The View My Schedule allows you to view the week's schedule and the default is today's schedule. The start of the week depends on the **First day of week** parameter.

- Pressing the day displays the respective daily schedule.
- Pressing the double left arrow shows the past two week's schedule and double right arrow to view the next two week's schedule.

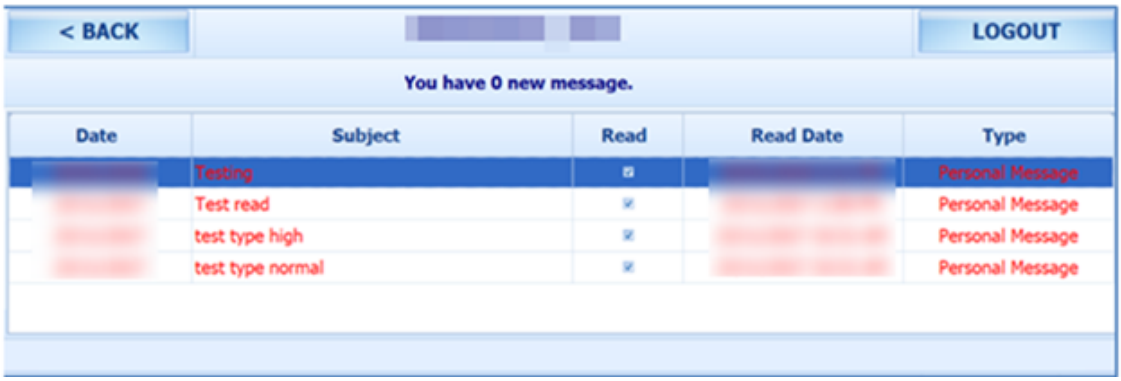
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View My Messages

The View My Messages displays all the crew's messages, sorted by date in descending order. The number of days to display is set in the Time Attendance, Display Messages x days old at terminal parameter.

If the value is set to 14 days, all read/unread messages that are 14 days old are shown.

Figure 8-39 View My Message Window



- To view the message details, select the message from the message list
- To delete the message, press the **Delete** button from the message dialog box
- To exit the **Detail Message** screen, press the **Close** button. Read messages are shown on the message grid and viewable unless they are outside the number of days defined

View My Account

View My Account enables you to view the previous or current cruise posting, and the default display is the current cruise posting.

Approve Onboard Charges

It is compulsory for crew that opt to settle their invoices through payroll deduction set in the Payroll module, Crew, Edit Details, Contract Type/Pay Group/Pay Position to approve any onboard charges.

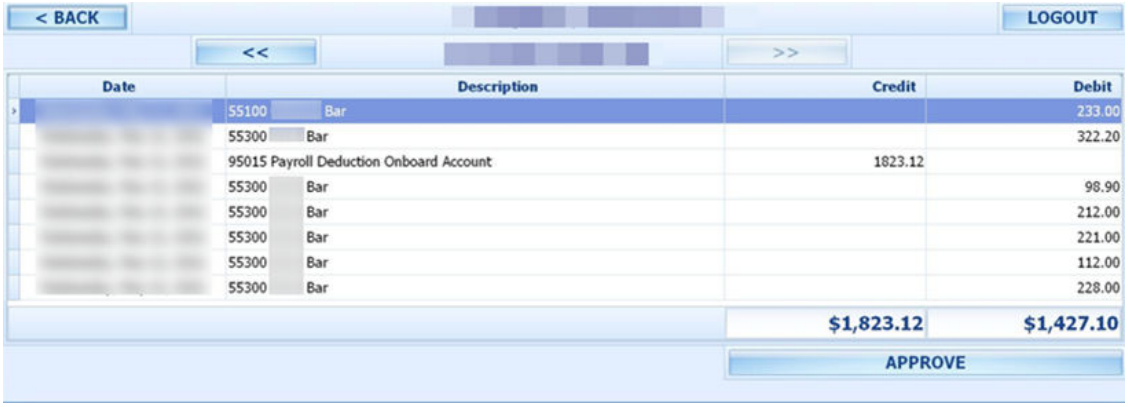
This feature is only feasible when the following conditions are defined:

- Payroll companies have "Deduct Folio" and "Invoice Payment Receiving" enabled.
- Settlement department setup is similar to Payroll Companies – Onboard Account Department.
- Crew payroll contract has "Deduct Folio" enabled.

The system sends a message informing the crew of the onboard charges that requires an approval and enables the **Approve** button in the View My Account screen.

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Figure 8-40 Approve Onboard Charges Window

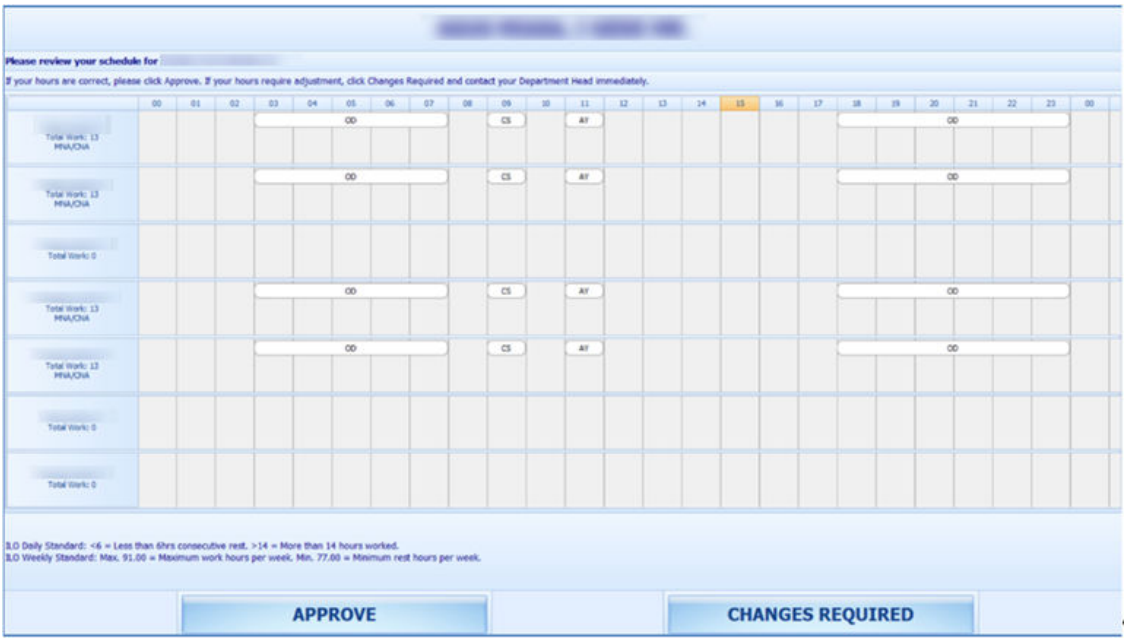


1. From the View My Account screen, select a transaction to approve. Multiple selection is not allowed.
2. Press the **Approve** button. Once approved, the **Approve** button changes to **Already Approved**.
3. If there are new settlements in the crew invoice, another approval is required.

Approve My Weekly Hours

Approve My Weekly Hours enables you to approve the roster on a weekly basis. The function requires the following parameters: Time Attendance, Approve Weekly Hours set to 1, Time Attendance, and Approval Frequency set to the same day as the server day. The Approve My Weekly Hours screen pops up when you log in to the terminal, if there are unapproved weekly hours.

Figure 8-41 Approve My Weekly Hours



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Legend:

- **Total Work:** The total hours worked.
- **Total Rest:** The total rest hour block one.
- **MNA:** Schedule not yet approved by manager.
- **CNA:** Schedule not yet approve by crew.
- **CHG:** Changes in schedules.

When the **Approve My Weekly Hours** is pressed, the system always shows the last week's schedule.

Pressing one of these button will:

- **Approve:** Approves the week's schedules.
- **Changes Required:** Trigger a change request notification to the Department Head for the week scheduled to be changed.

View My Upcoming Drills

The Safety Drills assigned to you in the Safety Drill module is also viewable from the T&A Terminal. To view the drill assignment, press the **View My Upcoming Drills** from the menu option.

Changing PIN Code

The Change Pin Code function changes your log in PIN for the T&A Terminal access.

Figure 8-42 Change PIN Code



1. Press the **Change PIN** from the menu option.
2. Enter the required information. Use the following keys to navigate.
   - **CLR:** Clears the field input value.

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- **BKS:** For backspace.
- **RESET:** Changes the PIN code.
- **CLOSE:** Cancels the PIN code change.

3. The system prompts a PIN code change successful or a warning if,
   - The PIN code length does not match the value set in the **General, PIN Code Length** parameter.
   - Old PIN code entered is incorrect.
   - Missing information on the required fields.

More Info

More Info allows you to browse the internet from this window. This function is enabled by setting the Enable More Info parameter value to **1**.

If the parameter is enabled, pressing the **More Info** button will start the Internet browser and direct you to the website defined parameter **Internet Browser Parameters**.

To exit the browser, press the **Close** button.

Clock-In/Clock-Out Mode in T&A Terminal

The Clock In / Clock Out mode has added functionality apart from the functions listed in Time Approval mode. It is listed below.

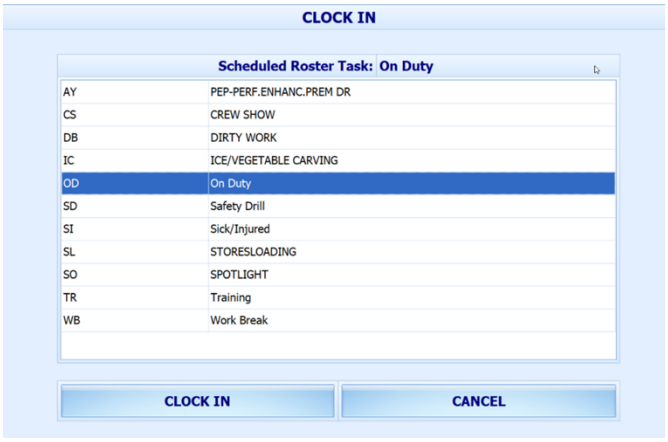
Clock-In

Clock In and Clock Out records the assigned task and the work hours so that the employee does not violate the total hours defined by the International Labour Organization (ILO).

1. Press the **Clock In** button from the Main Menu to clock in.
   - The Clock In option is disabled if you have not clocked-out from previous task.
   - If the PAR Use Clock In/Out option is enabled, the Clock Out and Change Task options will be disabled.
   - The system checks the clocked in time against the grace period defined in the Grace Period After Clock In parameter. If the Clock In time is within the grace period, the system defaults to the Scheduled Roster Task. Otherwise, it defaults to the top roster task on the list. For example, the grace period is 15 minutes and the scheduled roster is at 12:00, and crew clocks in at 12:07. The system defaults the Scheduled Roster Task as On Duty.
2. Select the **Schedule Roster Task** and press **Clock In**. The clock in task and time appears on the window.

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Figure 8-43 Schedule Roster Task



3. Your supervisor can view this information from the View Clock-In/ Out window in the Time Attendance Module.

Clock-Out

At the end of the shift, you are required to clock out from the assigned duty.

Press the **Clock Out** button at the Main menu to clock out the roster schedules. The clocked out task, date, and time automatically appears on the screen.

Change Task

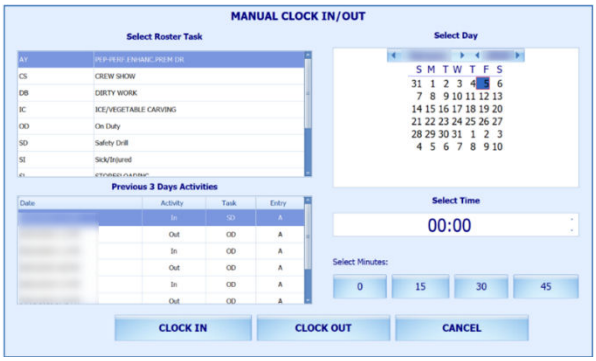
The Change Task feature is enabled only when there is a clock in task. Pressing the **Change Task** button automatically clocks out the previous task and registers the newly selected task into the system with date and time shown underneath the name.

Manual Clock-In/Out

Manual Clock In/Out allows you to manually clock in/out of the system.

1. At the Main Menu option, press the **Manual Clock In/Out**.
2. Select the **Roster task**, **day**, and **time**.
3. Press **Clock In** or **Clock Out** to manually add the record. The past three days' activities appear on screen.

Figure 8-44 Manual Clock-In/Out



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Approve My Daily Hours

The Approve My Daily Hours allows the crew to request a change to the crew's approval status *x* days past the system date, depending on the days defined in the *Past x Days Crew Can Request Approval Change* parameter.

Figure 8-45 Approve My Daily Hours



View My Daily Hours

The View My Daily Hours function displays the crew's current day's activities, and this function is enabled/disabled using the *View Daily Hours Clock In/Out* parameter. The information displayed on this window is the same as Approve My Daily Hours.

View My Current Week Hours

This function displays the current week's worked hours and is enabled/disabled by the *View Current Weekly Hours Clock-In/Out* parameter.

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Part IV
Management

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9

Administration

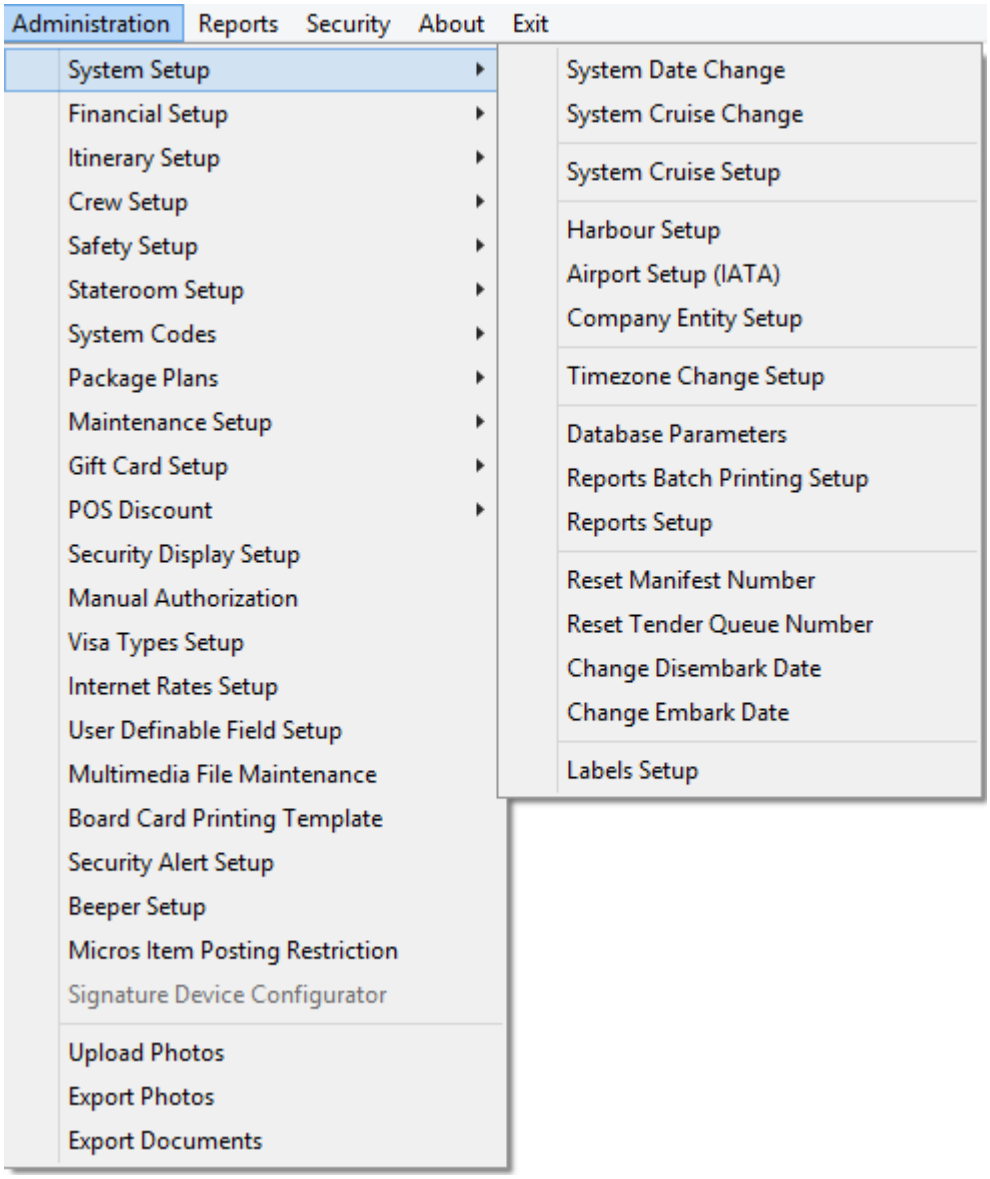
The Administration module serves as the core of SPMS, where system codes are meticulously constructed based on the ship's operational guidelines and requirements. Each code may interlink with other fields or depend on prerequisite codes, underscoring the importance of understanding these relationships before initiating coding tasks. Key personnel such as the System Administrator, Chief Purser, Accounting Purser, Crew Purser, Cruise Director, Group Coordinator, and Safety Officer bear responsibility for configuring and upholding these codes.

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.

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Figure 9-1 Administration Menu



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.

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Figure 9-2 Cruise Setup

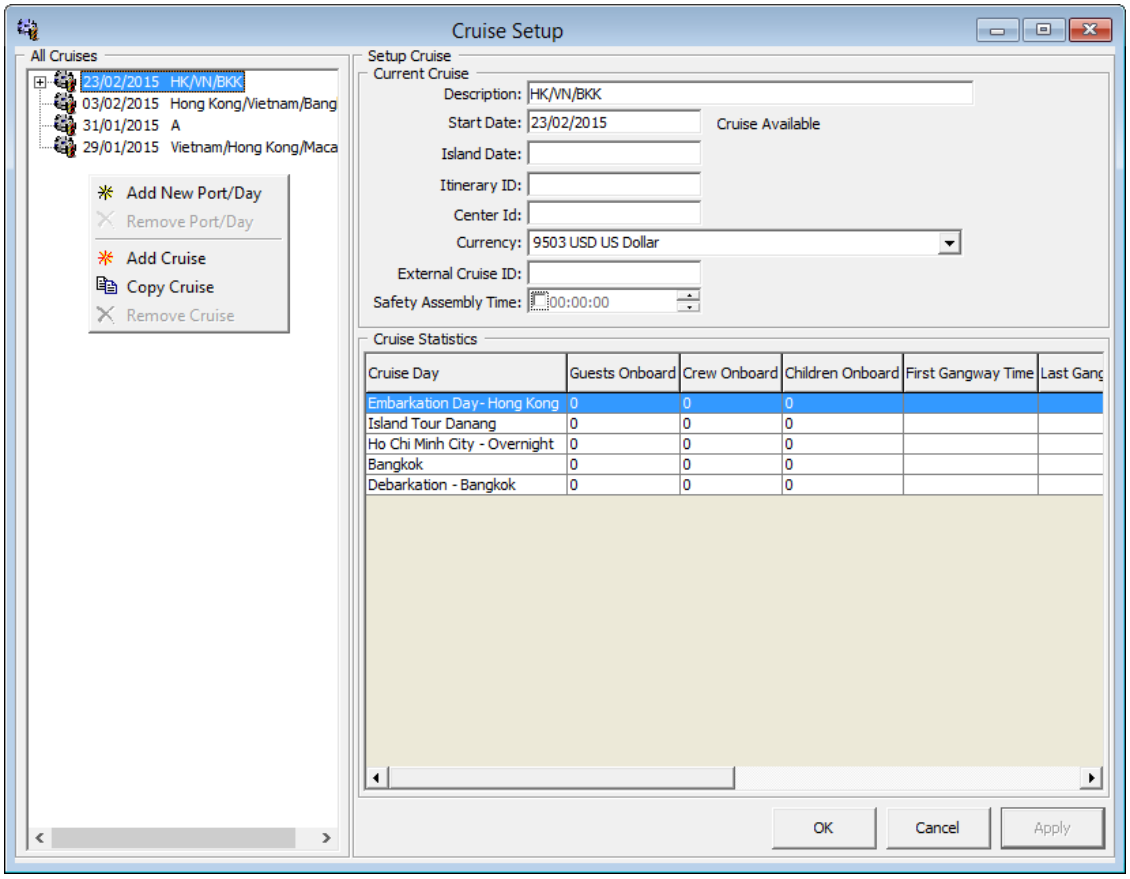


Table 9-1 Cruise Setup Field Definition

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
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.

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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.

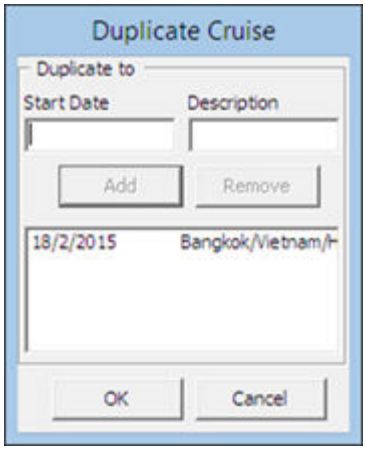
Copying Cruise Day

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**.

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Figure 9-3 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

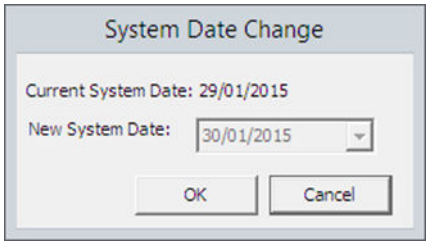
1. From the **System Setup** drop-down menu, select **System Date Change**.

> **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**.

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Figure 9-4 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.

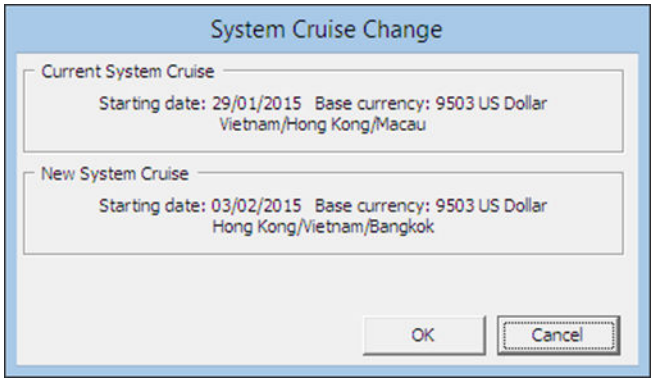
Performing System Cruise Change

> **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.

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Figure 9-5 System Cruise Change



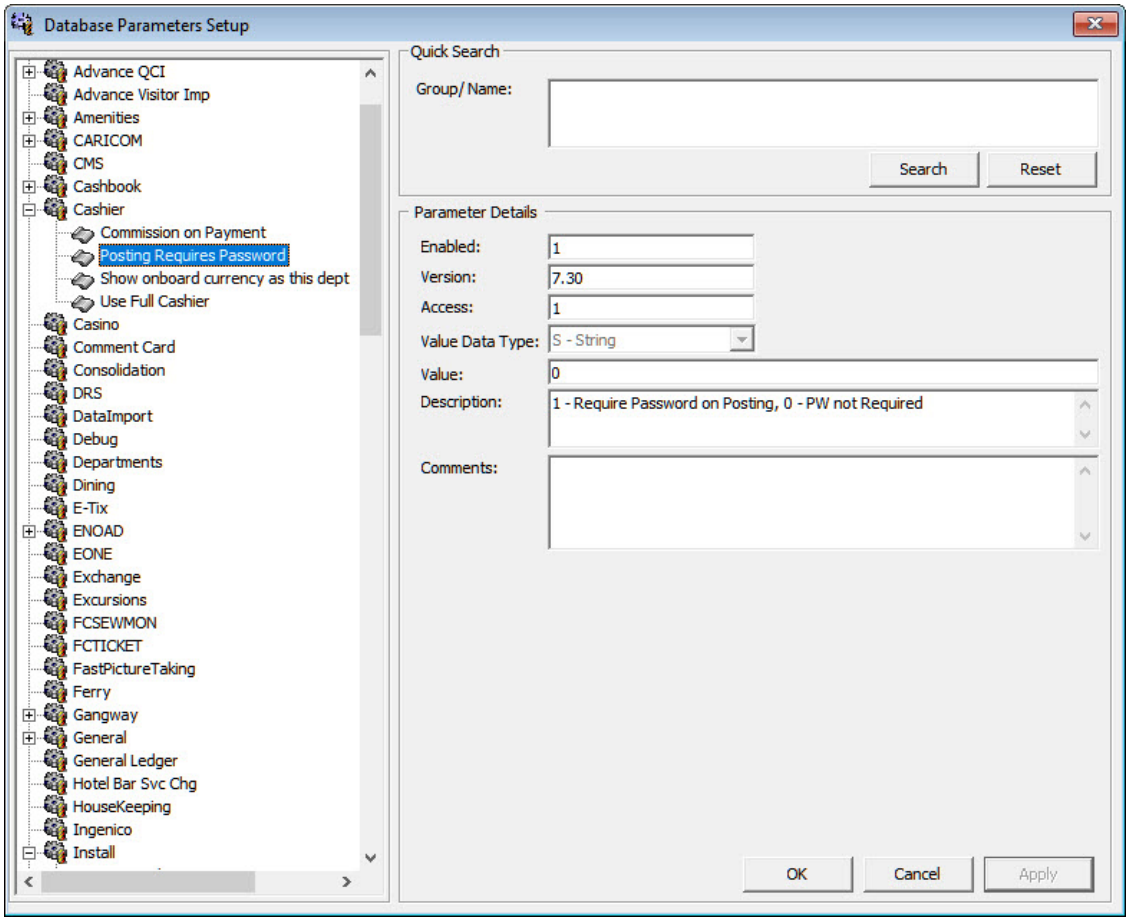
3. You will receive an Open Balance Warning if an unbalanced System Account is detected. Select **Yes** to proceed or **No** to return to the previous menu and resolve all pending check outs.
4. Once the cruise change completes, the application returns to the Main menu.

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.

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Figure 9-6 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 Keep 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.

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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

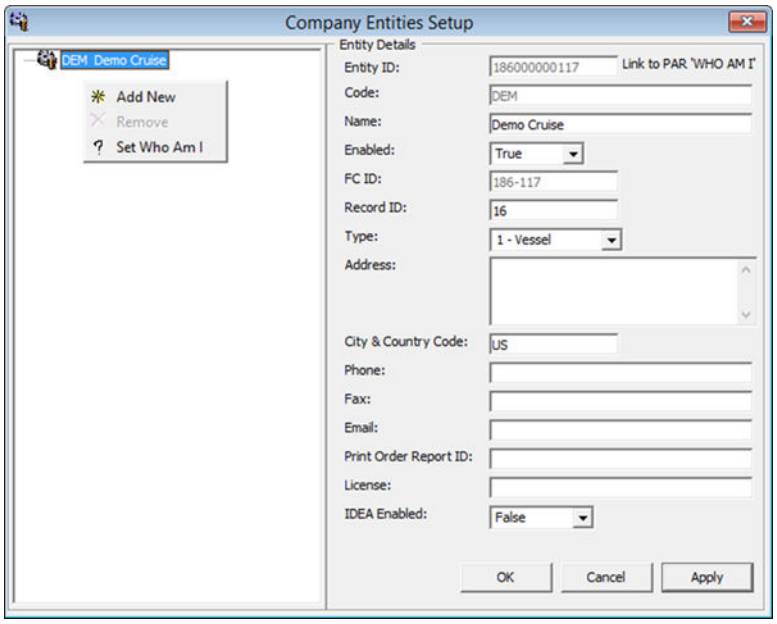
1. In the **Airport Setup (IATA) setup, All Airport section**, right-click and select **Add New**.
2. Enter a **short code**and description in the Description field.
3. Enter a **comment** in the Comment field, if any.
4. Click **Apply** to save.

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 9-7 Company Entities Setup



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Table 9-2 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.

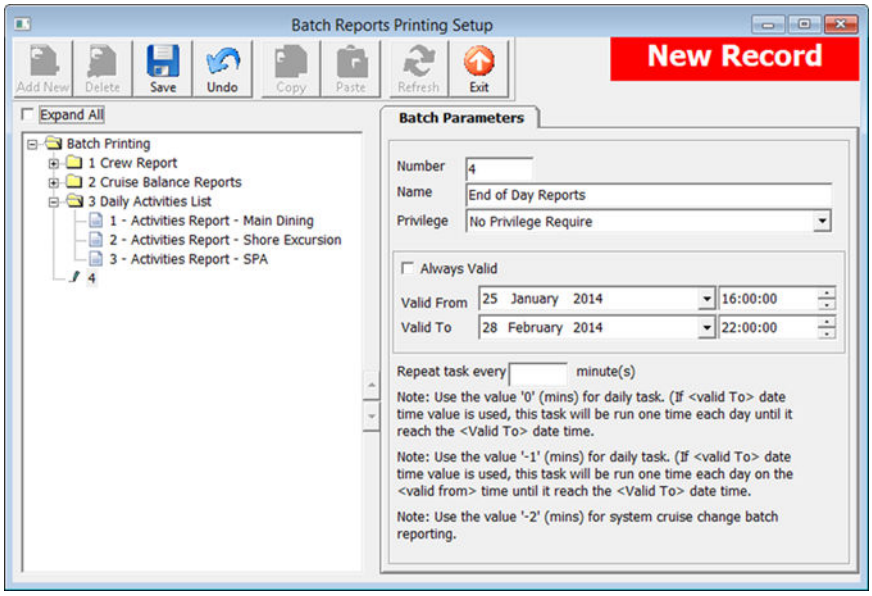
Batch Reports Printing Setup

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**.

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Figure 9-8 Batch Reports Printing Setup



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 9-3 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.

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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

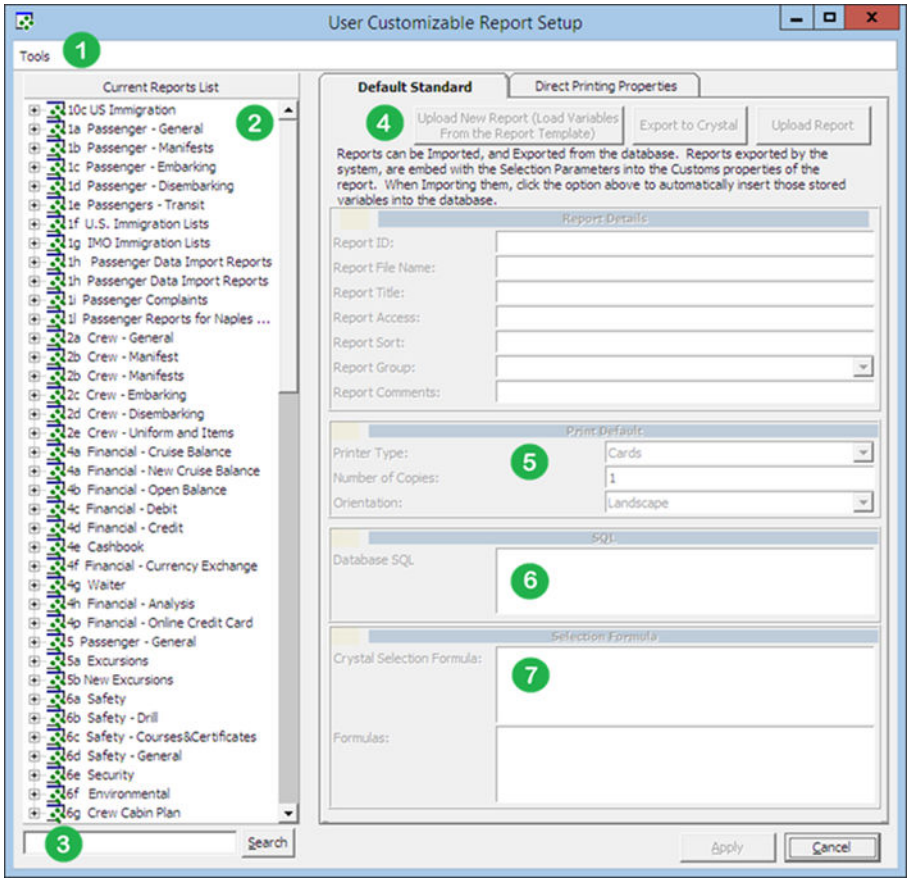
1. Select the Report Group from the Batch Printing tree and then click **Delete** button at the ribbon bar.
2. At the confirmation prompt, click **Yes** to proceed.

> **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 9-9 Report Setup



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Table 9-4 Setup Functions In Report

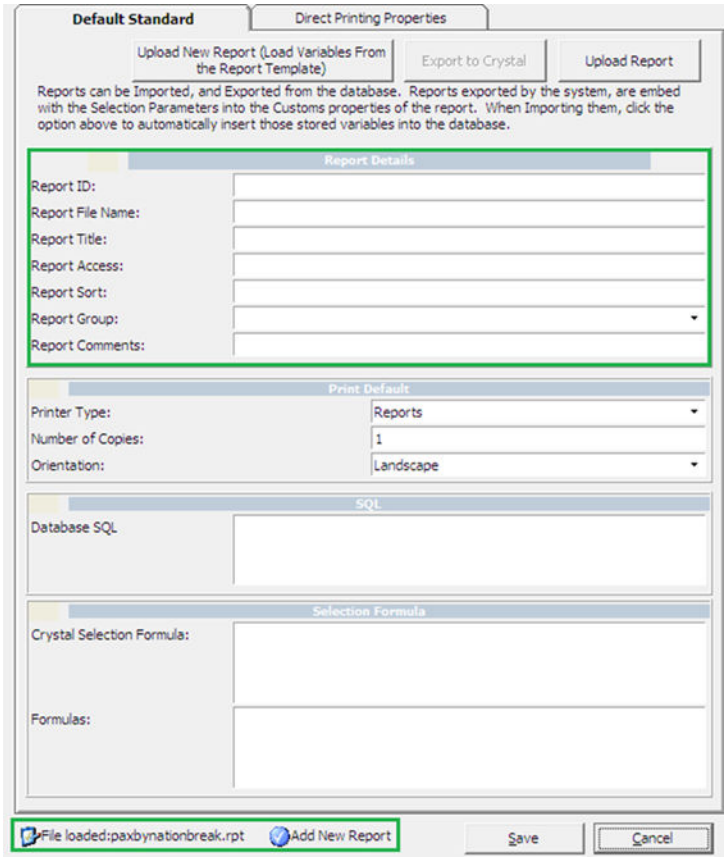
Figure	Description
1	Tools function that uploads report templates from a public folder.
2	List of report sets available, including those manually uploaded.
3	Search function that enables you to search for a report.
4	Report detail of the report. For example, Report ID, User Access, Report Group.
5	Default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

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Figure 9-10 Default Standard for Report



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.

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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** checkbox 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.

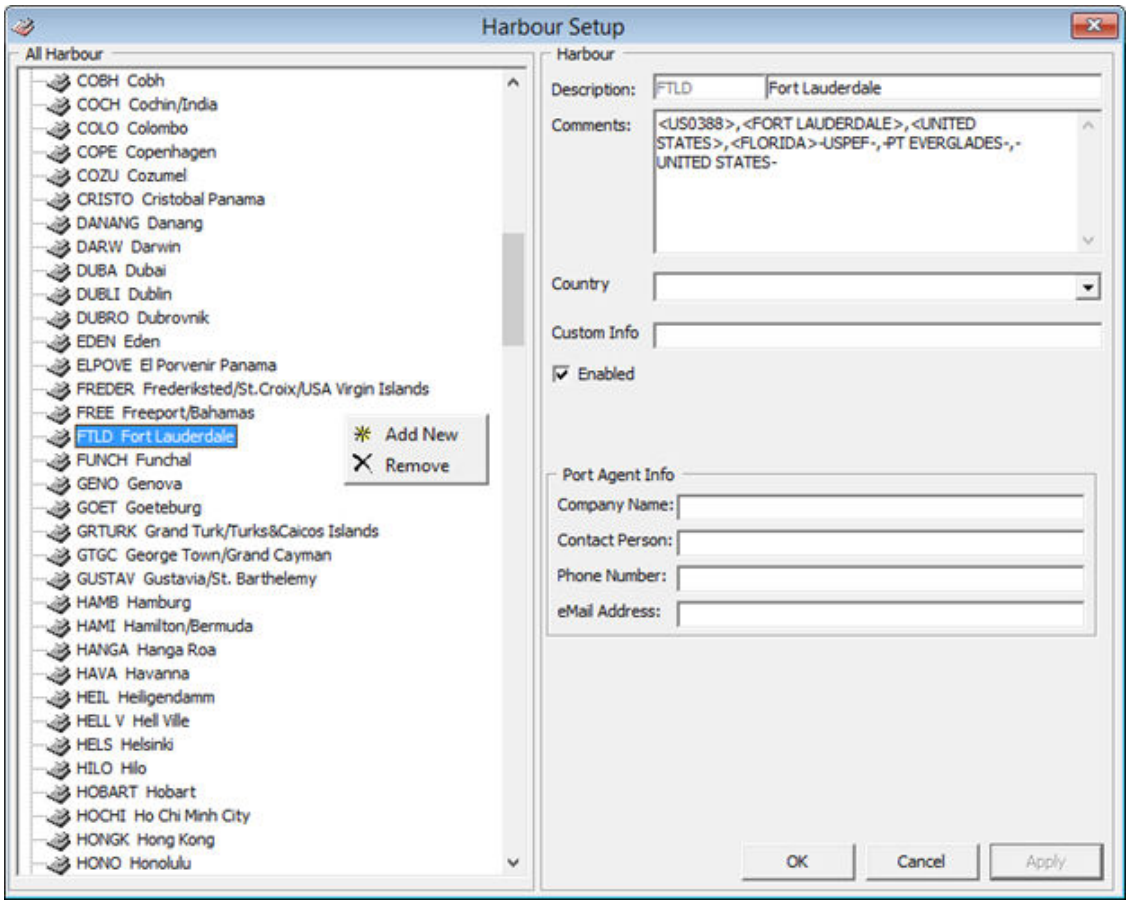
Harbour Setup

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

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Setting Up a Harbour/Port

Figure 9-11 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** checkbox is selected by default. Deselect the checkbox 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**.

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

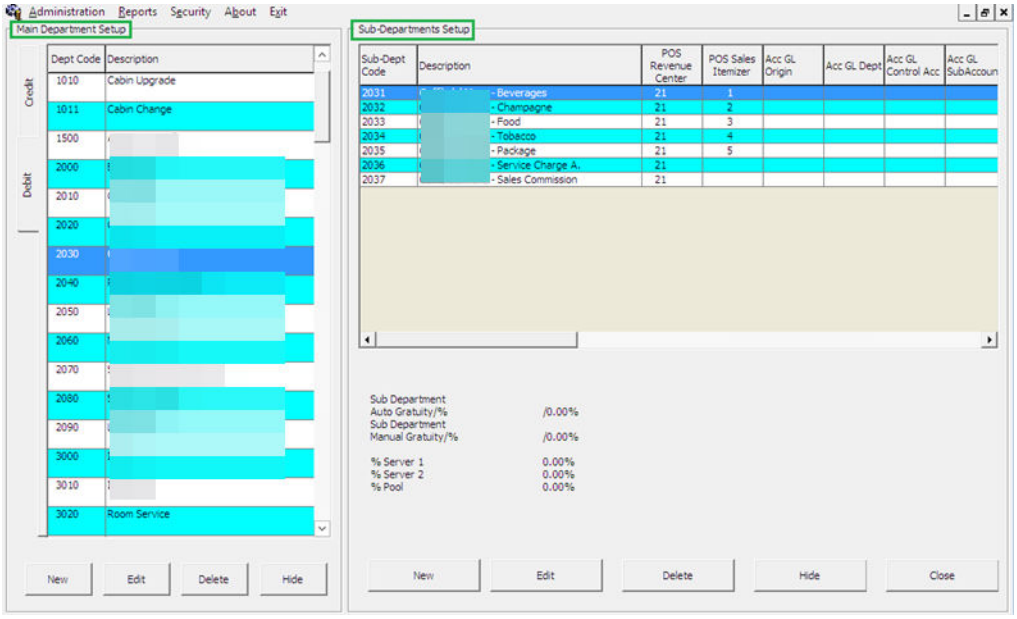
Financial Setup

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 9-12 Main/Sub-Department Setup



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.

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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 9-5 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 9-6 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.

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Table 9-6 (Cont.) Debit Sub-Department Field Definitions

Field Name	Description
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	Checkbox 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 9-7 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.

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Table 9-7 (Cont.) Credit Sub-Department Field Definitions

Field Name	Description
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 POS System.
Allow Posting to Crew Cabin	Posting allowed by POS System.
Allow Posting to Gift Card	Posting allowed by POS System.
G.Ledger Id.	General Ledger codes in Chart of Accounts.
Eligible Department	If the checkbox 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.

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Table 9-7 (Cont.) Credit Sub-Department Field Definitions

Field Name	Description
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.

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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** checkbox 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 Ship liaise 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 a performing a cabin upgrade.

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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 checkbox 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 checkboxes are selected. Click **Import** to save the information into the BIN table.
4. Click **Close** to exit.

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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.

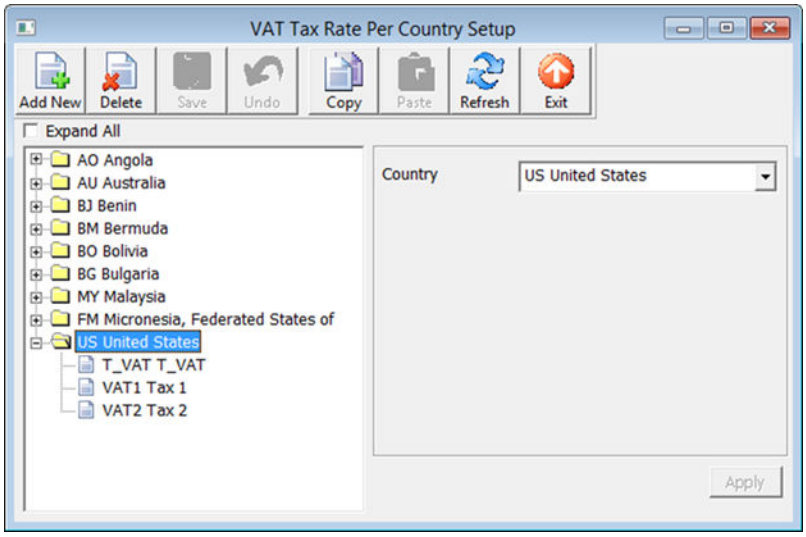
1. From the Financial Setup menu, select **VAT Tax Class**.
2. On the left pane of the setup screen, right-click and select **Add New**.
3. Enter the **short code** and the **application name** in the Description Field and click **Apply** to save.

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.

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Figure 9-13 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.

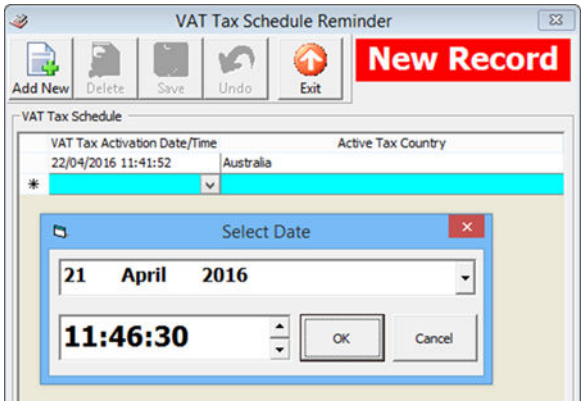
1. From the Financial Setup menu, select **Activate Tax Rate**.
2. Select the country tax to activate from the drop-down list and then click **OK**.
3. At the confirmation prompt, select **Yes** to activate.

VAT Tax Reminder

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

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Figure 9-14 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.

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 are appears as an information board in the Management, Itinerary Overview, and are entered through **Administration, Itinerary Setup**.

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Adding an Activity

Figure 9-15 Activities Setup

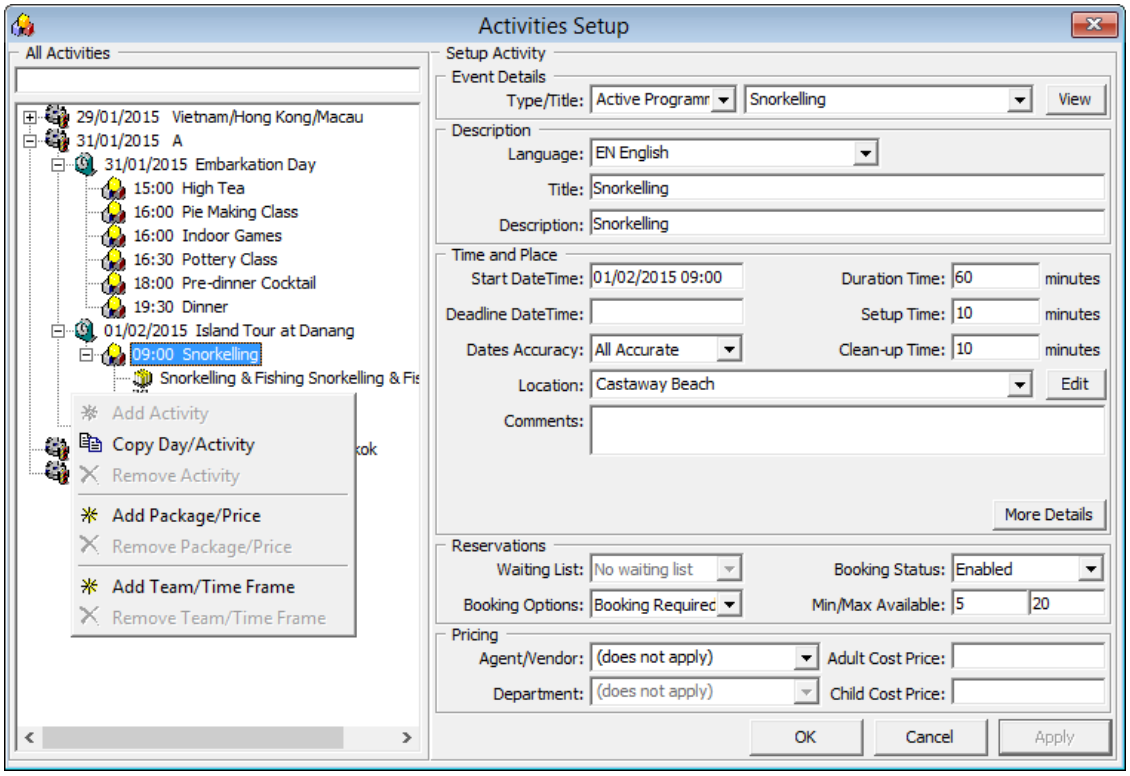


Table 9-8 Field Description of Activities Setup

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.
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.

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Table 9-8 (Cont.) Field Description of Activities Setup

Field Name	Description
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.

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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.

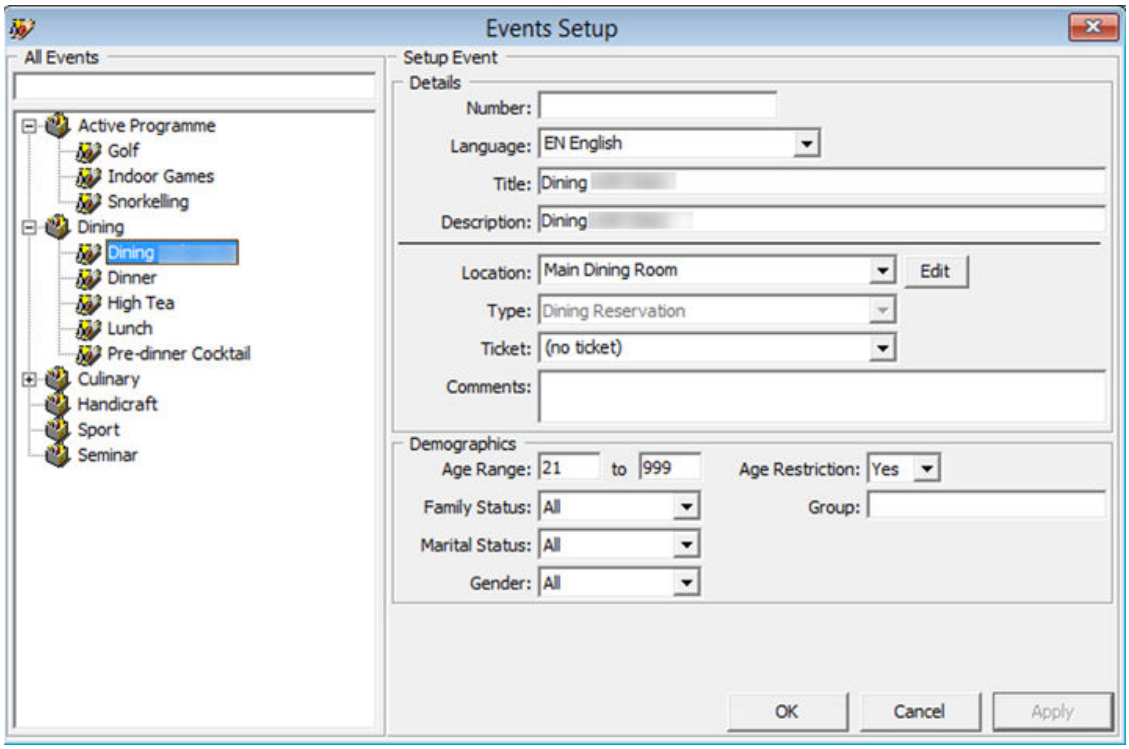
Removing an Activity

Activities that are no longer required or haves 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.

Events

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

Figure 9-16 Event Setup Screen



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Table 9-9 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.
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.

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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.

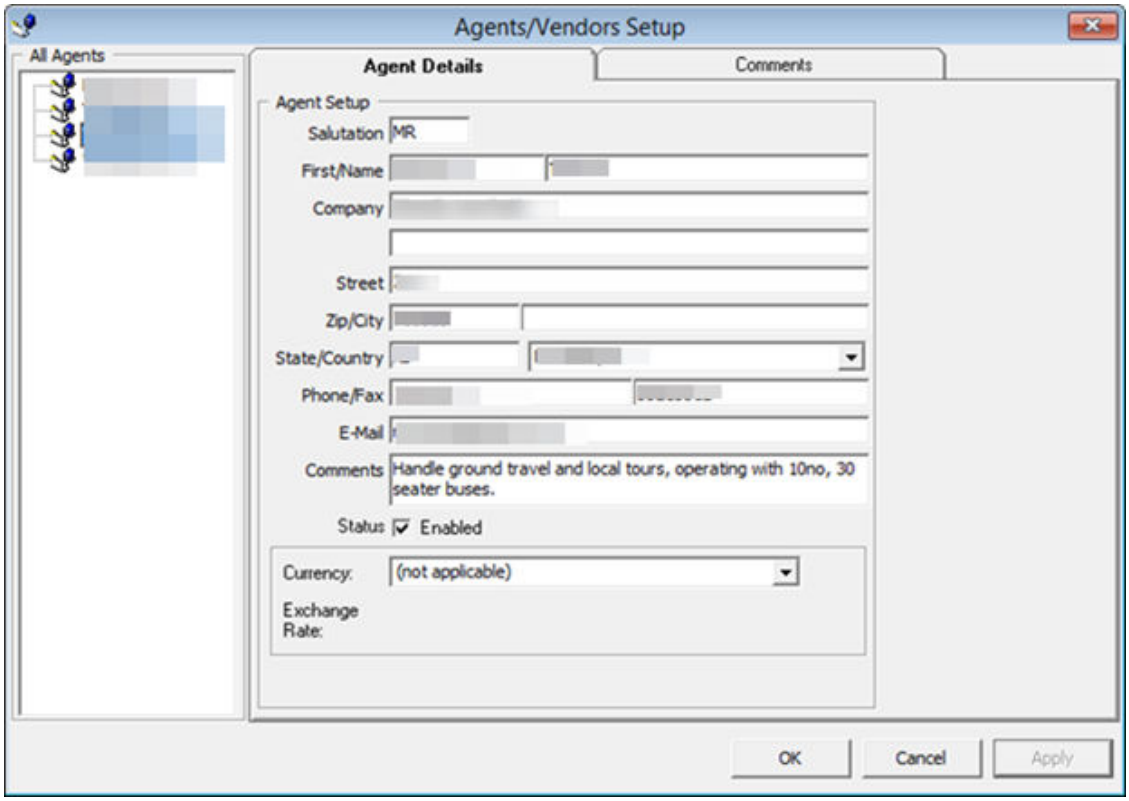
Adding an Event Exception

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.

Vendors

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

Figure 9-17 Agents/Vendors Setup



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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.

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).

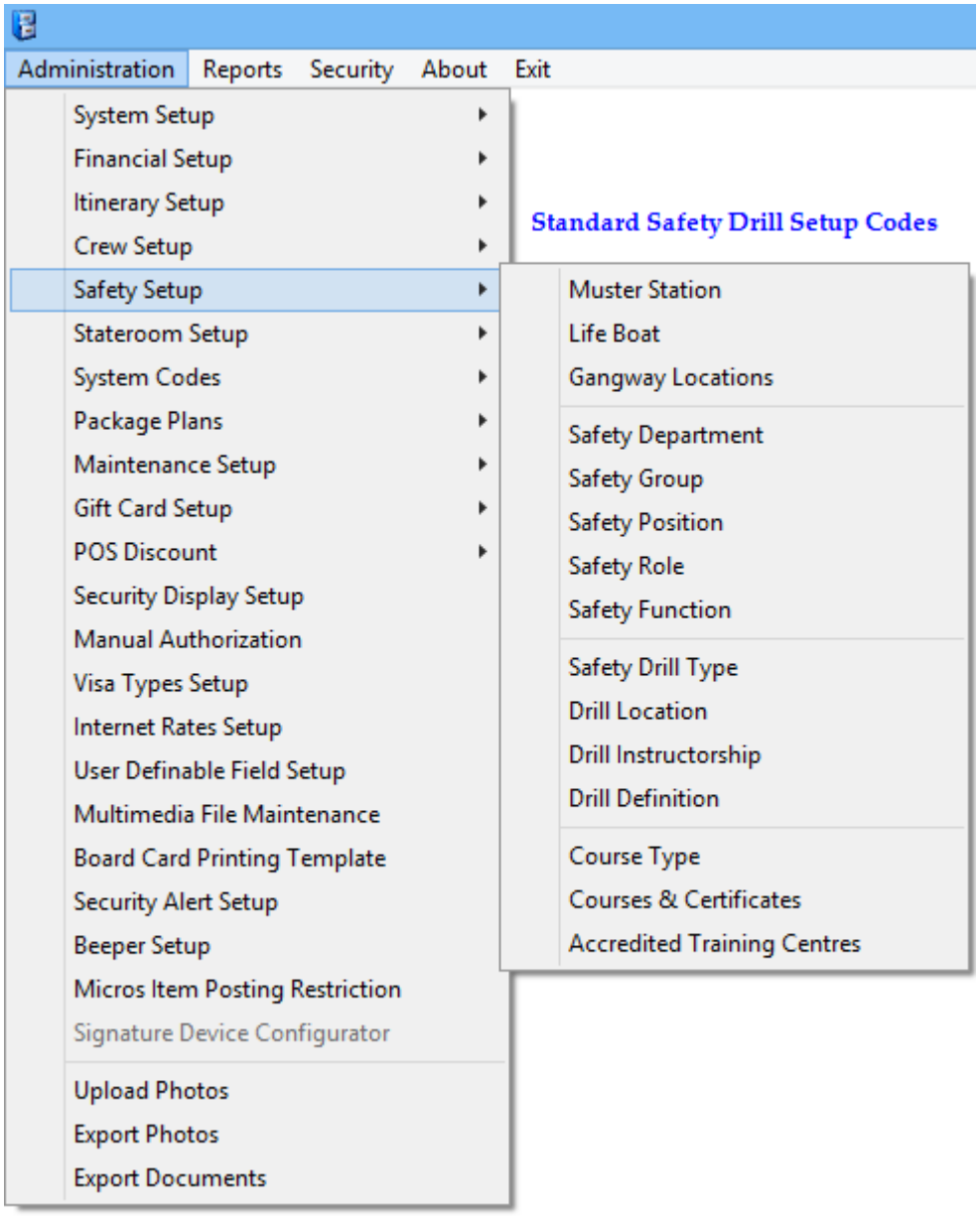
Safety Setup Type

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.

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Figure 9-18 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.

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Figure 9-19 Advance Safety Drill Setup Codes

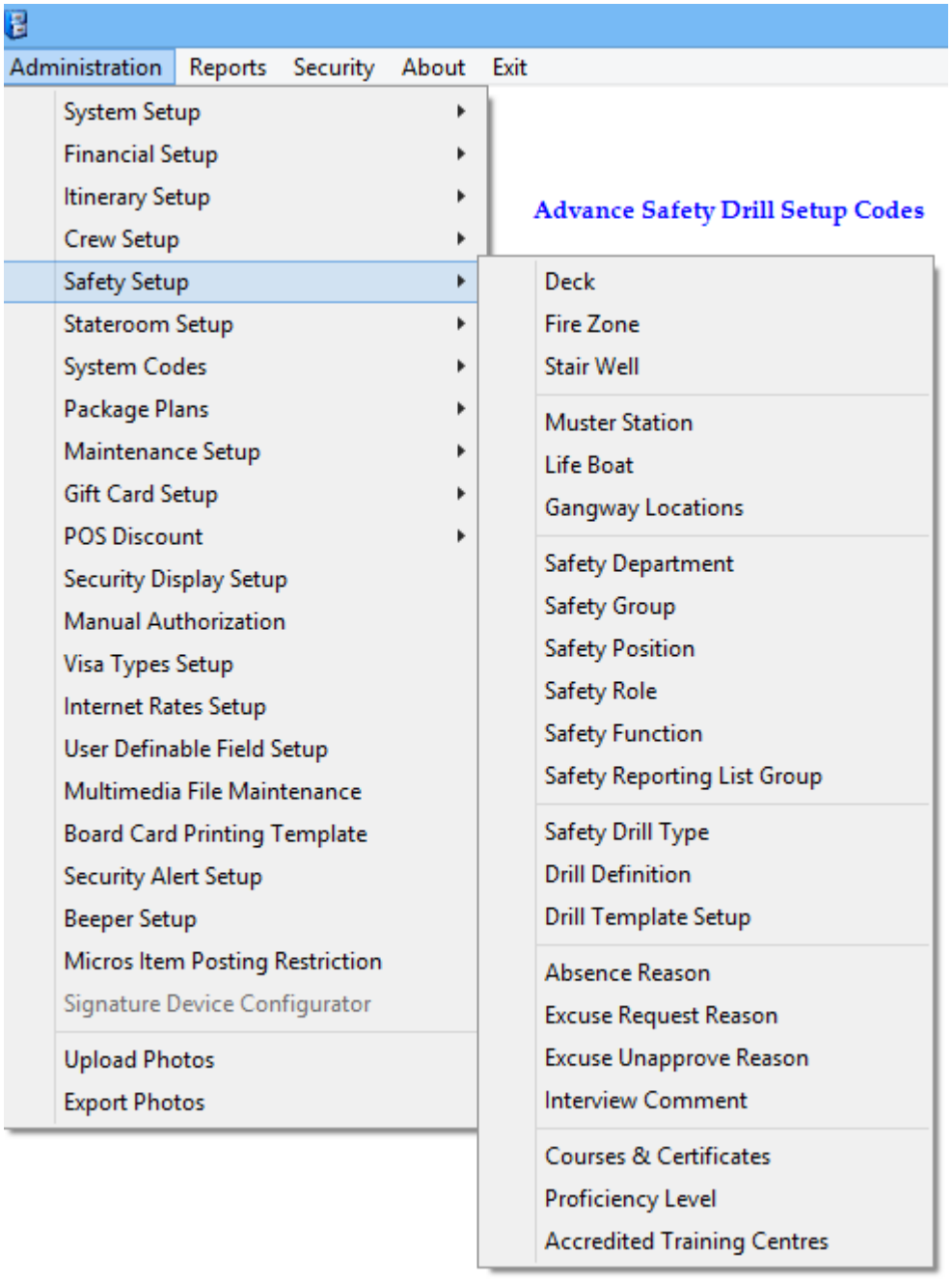


Table 9-10 Safety Setup Configuration Codes

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.

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Table 9-10 (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.

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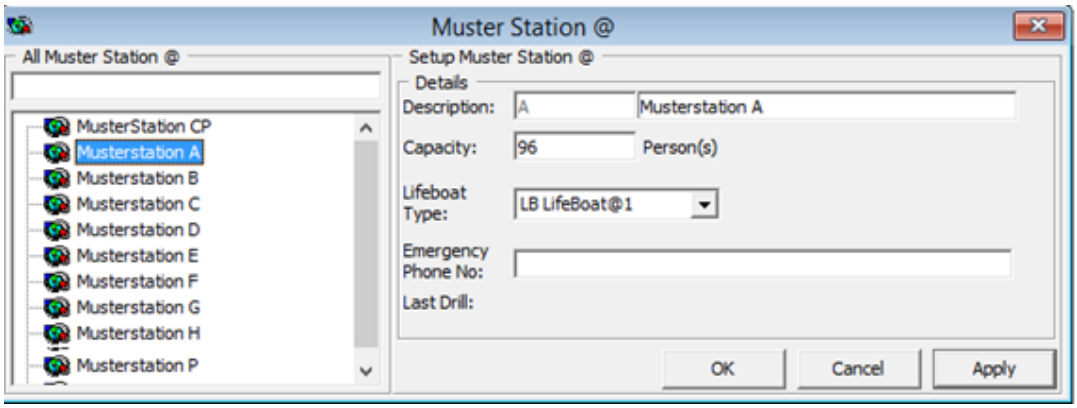
2. Right-click the **blank space** on the left and select **Add New**.
3. Enter a short code and the name, and further describe the code in the **Comments** field.
4. The **Enabled** field is selected by default. Deselect the box to disable the code.
5. Click **Apply** to save the code.
6. Right-click 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 9-20 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.

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Figure 9-21 Lifeboat/Liferaft Setup

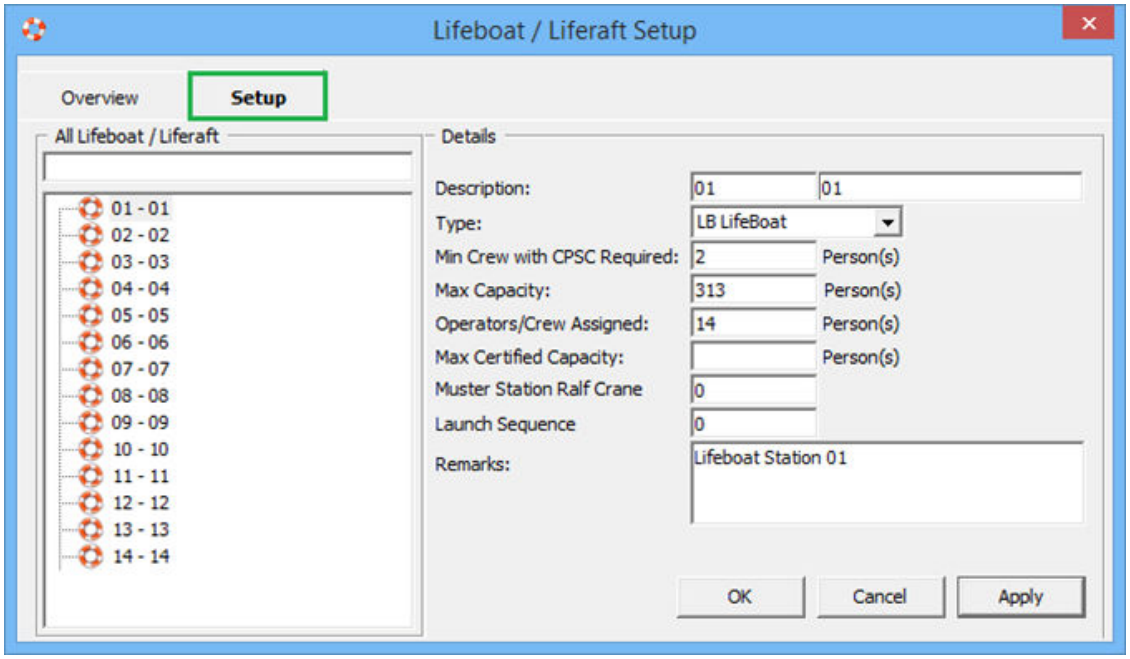


Table 9-11 Lifeboat/Liferaft Setup Field Definition

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.

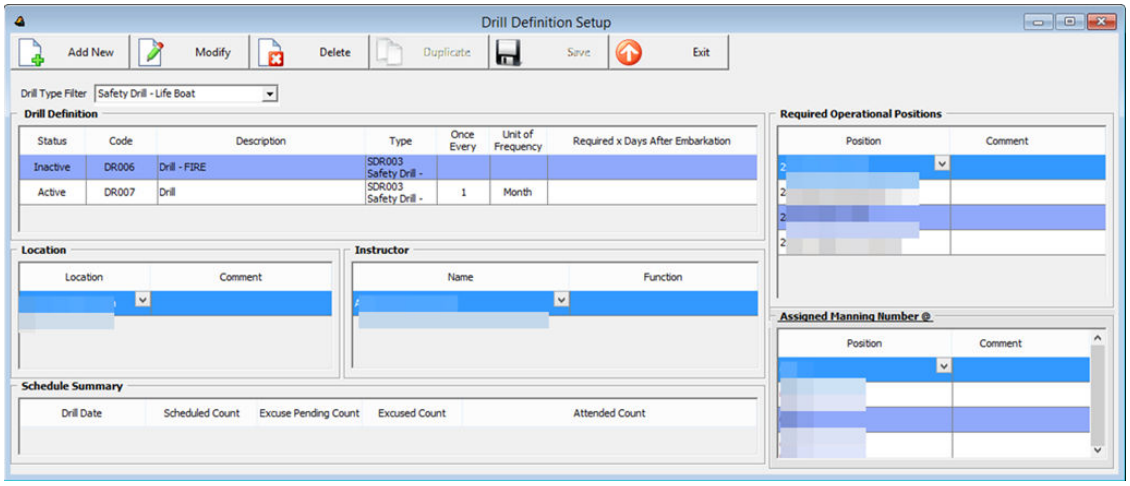
To set up the codes, repeat the steps in Setting Up Muster Station. You can also duplicate an existing Lifeboat code using the same steps.

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.

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Figure 9-22 Drill Definition Setup



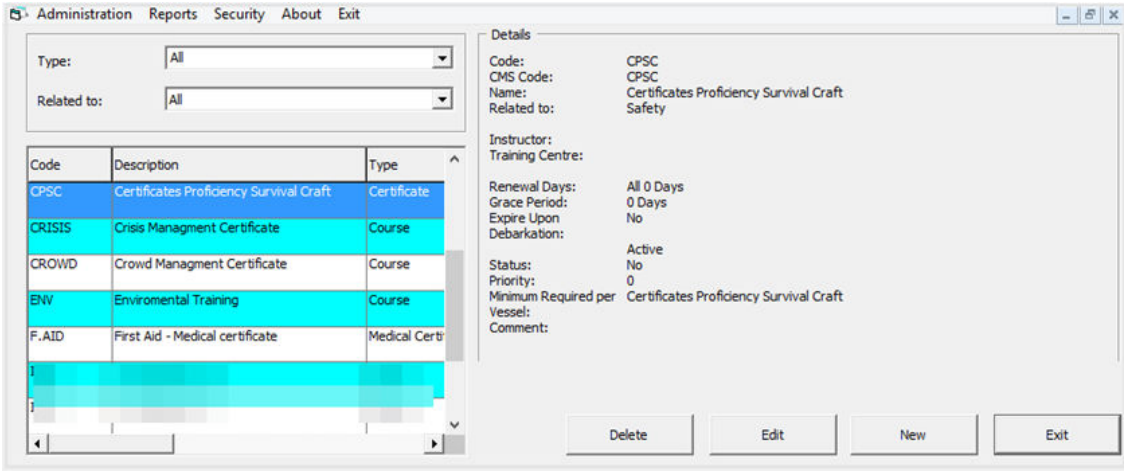
1. From the Safety Setup menu, select the **Drill Definition**.
2. To add a new drill, click **Add New**.
3. Select the **Status** from the drop-down list. and enter the **Drill Code** and description.
4. In the Drill Definition section, select the **Drill Type** from the drop-down list.
5. Enter the **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.

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Figure 9-23 Course and Certificates Setup Window



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 checkbox is checked by default. Un-check if you wish to disable the course.
9. Check the **Priority** checkbox 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.

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- Muster Station
- Lifeboat/Liferaft
- 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

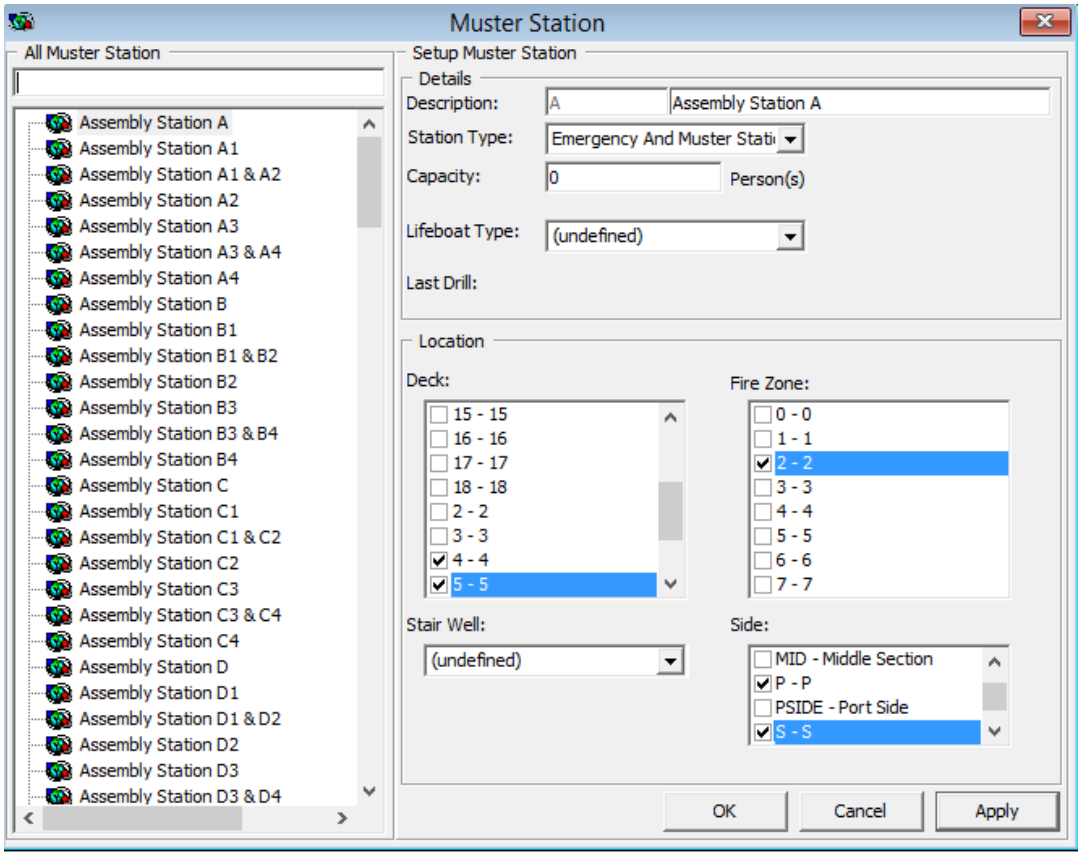
Setting Up Muster Station In Advance Drill Mode

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.

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Figure 9-24 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 haves 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** checkbox 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** checkbox 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**.

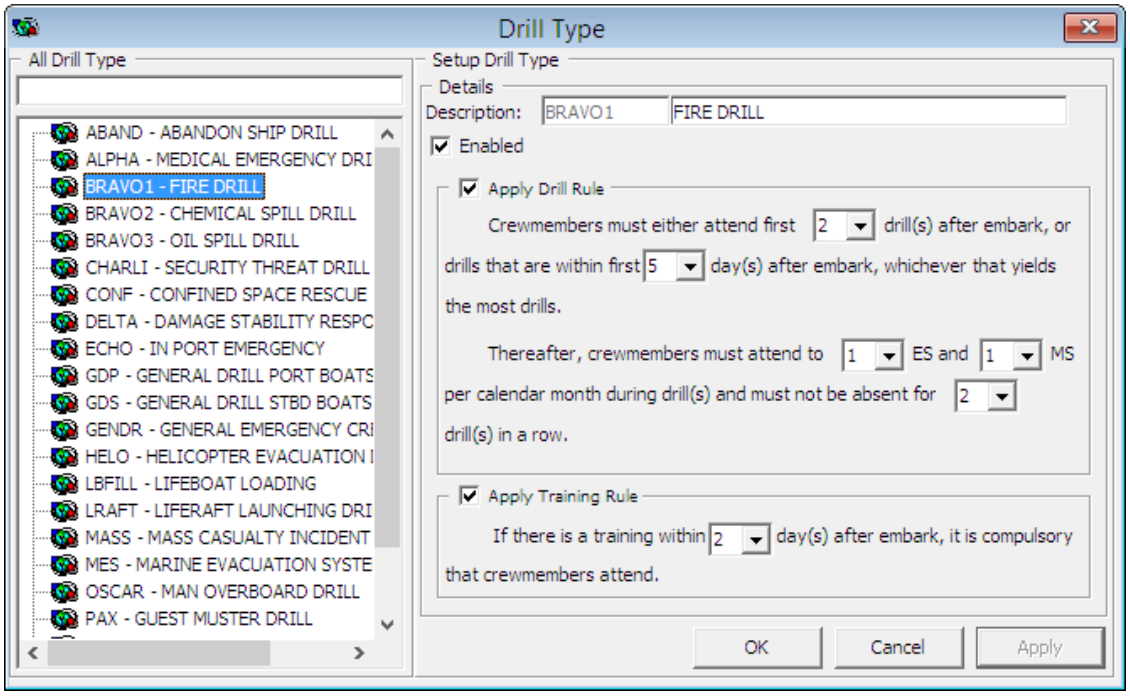
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2. Right-click in the **blank space** and select **Add**.
3. Enter a **short code**, **description** and **comments**, if any.
4. Select the **Commander/2nd Commander** checkbox if needed.
5. Click **Apply** to save the code.

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 9-25 Drill Type Setup



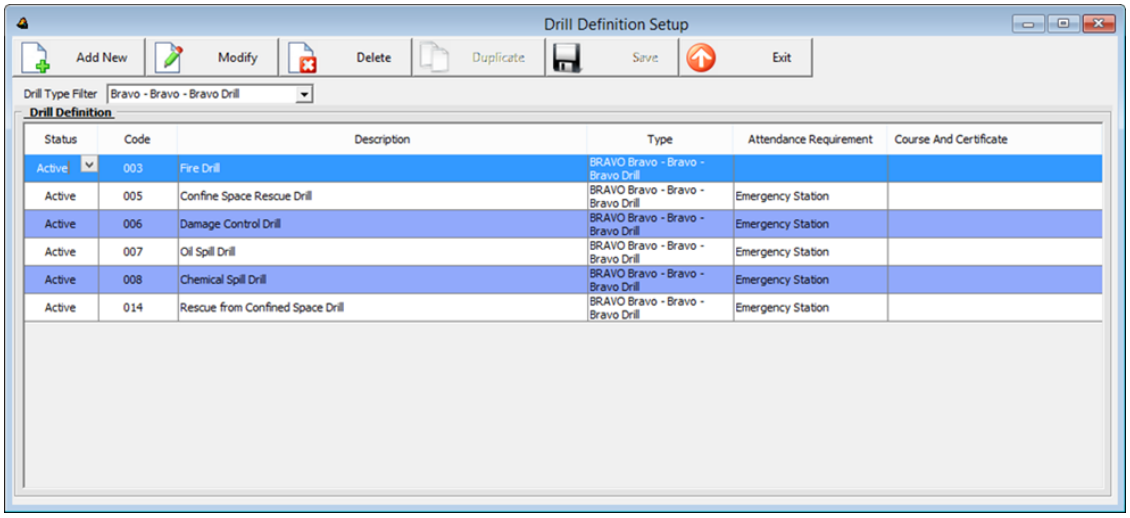
1. From the Safety Setup, select the **Safety Drill Type**.
2. Right-click the All Drill Type section and select **Add Drill Type**.
3. Enter a code and description in the Description field.
4. Check the **Apply Drill Rule** to enable input of the rule.
5. Update all the fields in the Apply Drill Rule.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

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Figure 9-26 Drill Definition Window



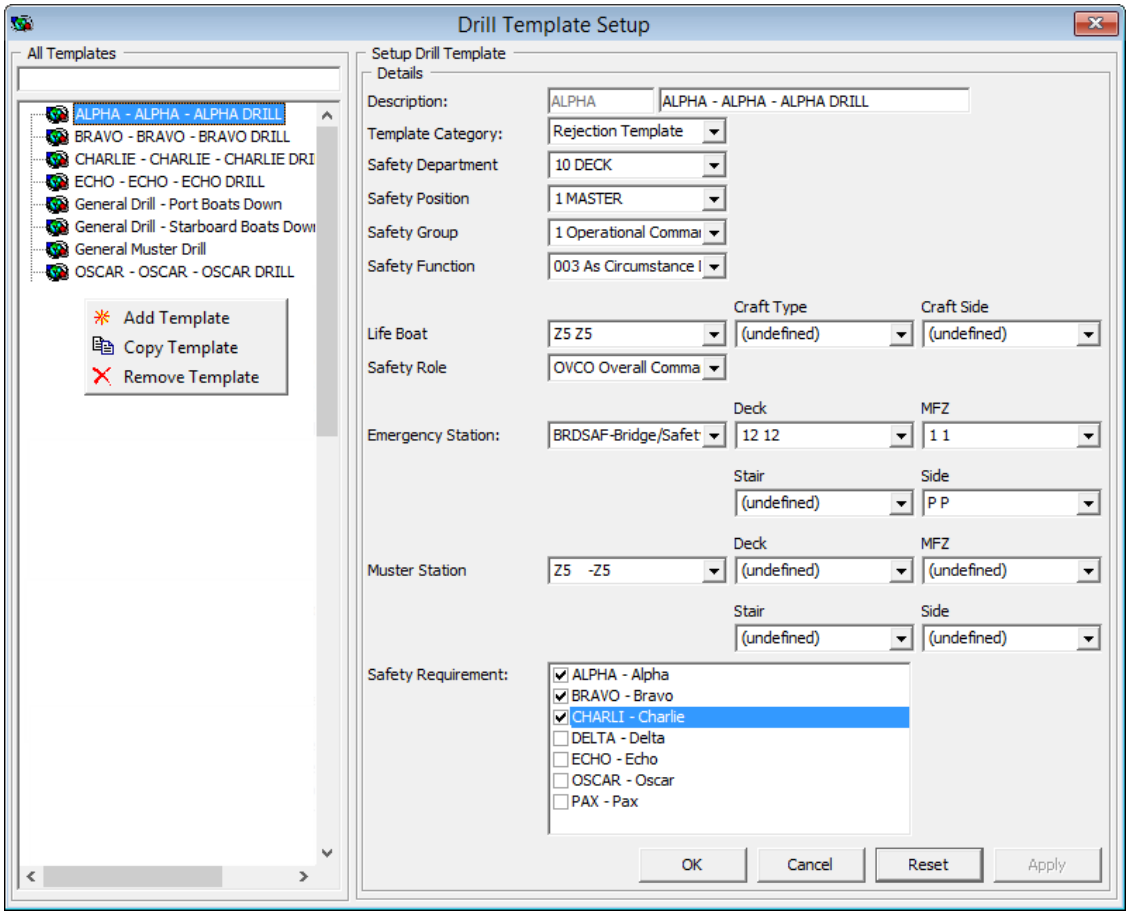
1. From the Safety Setup menu, select the **Drill Definition**.
2. Click **Add New** to add a new drill.
3. At the definition grid, update the following.
   a. Status
   b. Drill Code and Description
   c. Type
   d. Attendance Requirement
   e. Course and Certificate
4. Click **Save**.

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.

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Figure 9-27 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.

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Figure 9-28 Course and Certificate Setup Advance Drill Mode

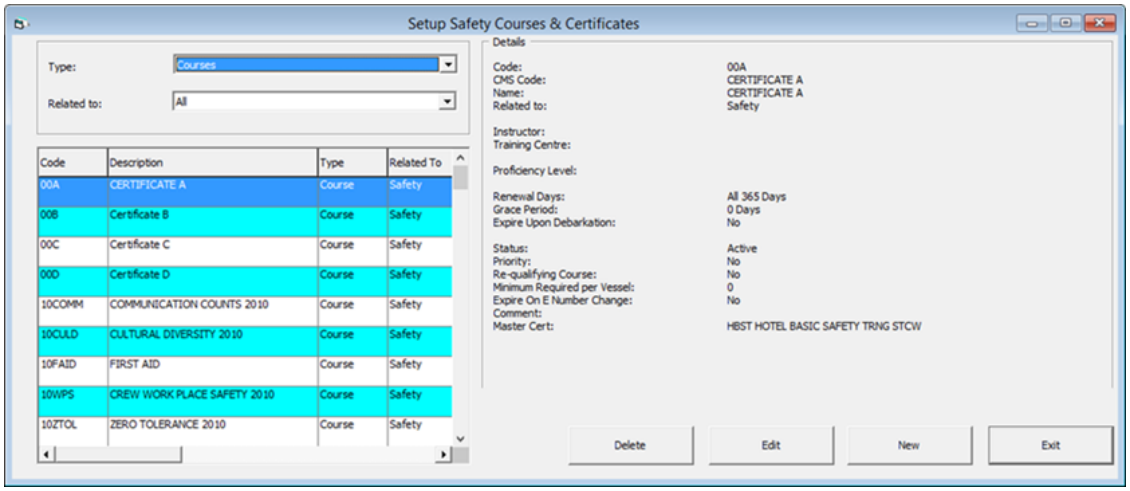
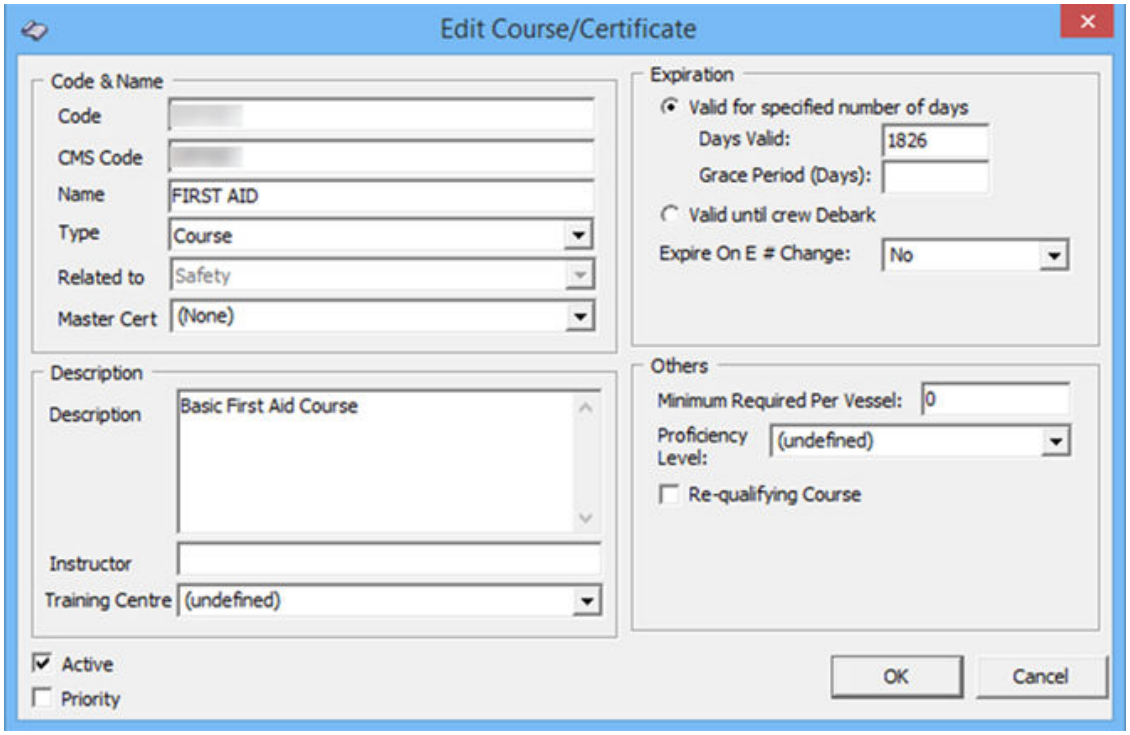


Figure 9-29 Edit Course/Certificate Window



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.

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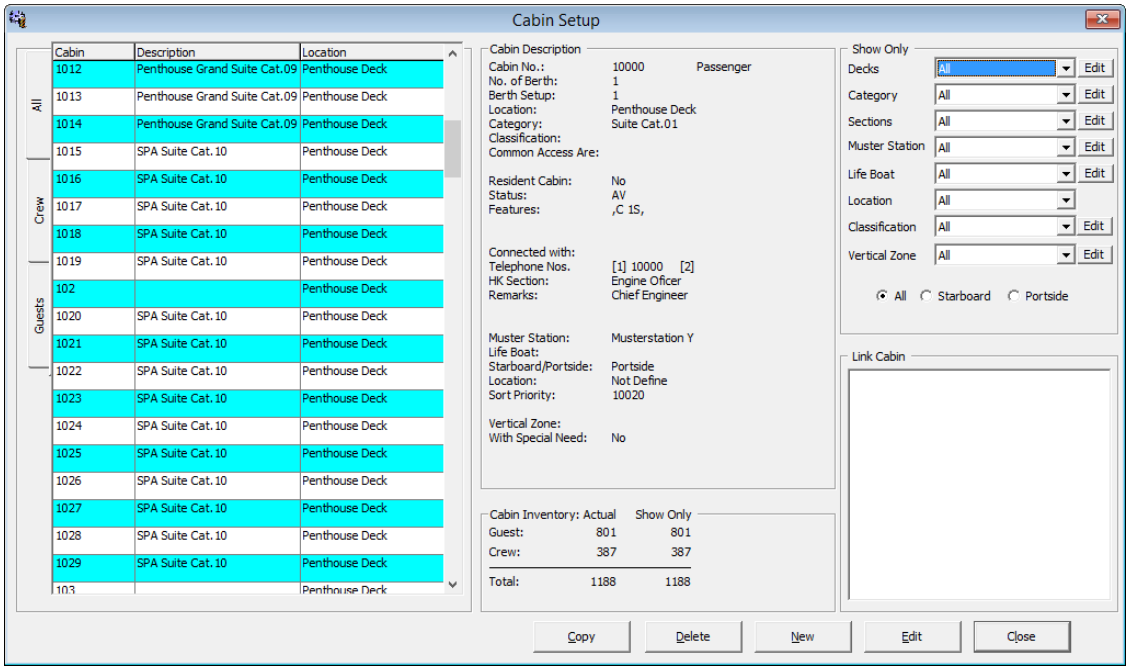
7. Enter the **Minimum Required Per Vessel, Proficiency** and check the **Re-qualifying Course**, if required.
8. The Active checkbox is selected by default. Deselect if you wish to disable the course.
9. Select the **Priority** checkbox if the course is a priority.
10. Click **OK** to save the code.

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 9-30 Cabin Setup Window



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.

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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.

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Figure 9-31 Batch Check In/Out Window

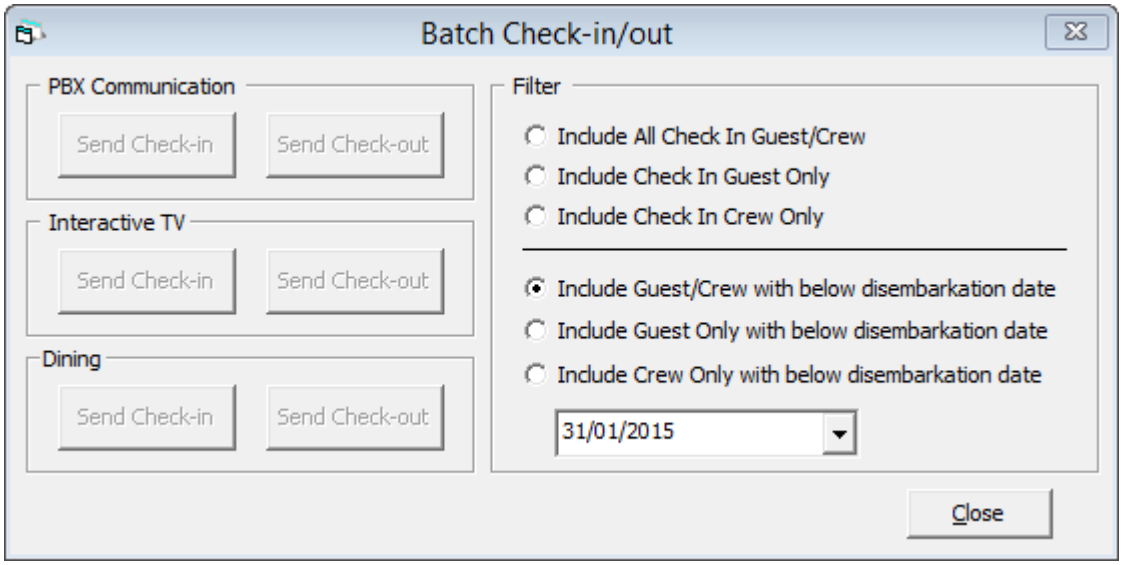


Table 9-12 Batch Check-In/Out Filters

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.

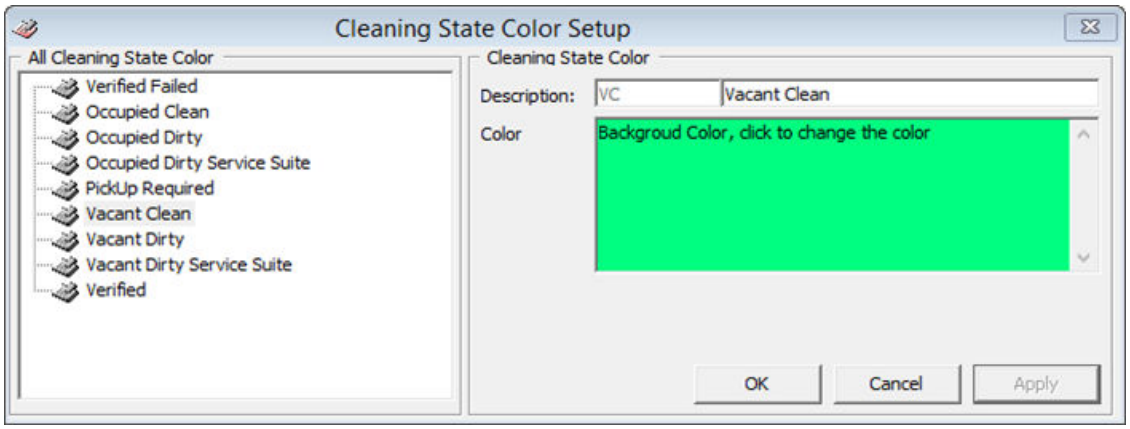
1. Select **Feature** or **Amenity Items** from the Stateroom Setup menu.
2. Right-click on the blank space and select **Add New**.
3. Enter a code and description, and a comment if any.
4. Click **OK** to save.

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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 9-32 Cleaning State Color Setup

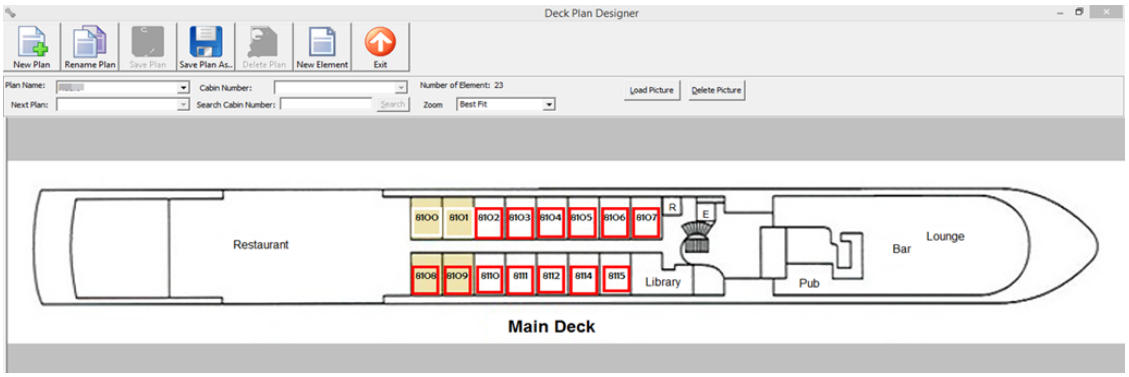


1. Select the **Cleaning State Color** from the Stateroom Setup menu.
2. Select the **Cleaning Status**.
3. In the **Color** field, click to change the background color.
4. Click **OK** to save.

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 9-33 Deck Plan Setup



1. Select the **Deck Plan Designer** from the Stateroom Setup menu.

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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.

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Common Access Area

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

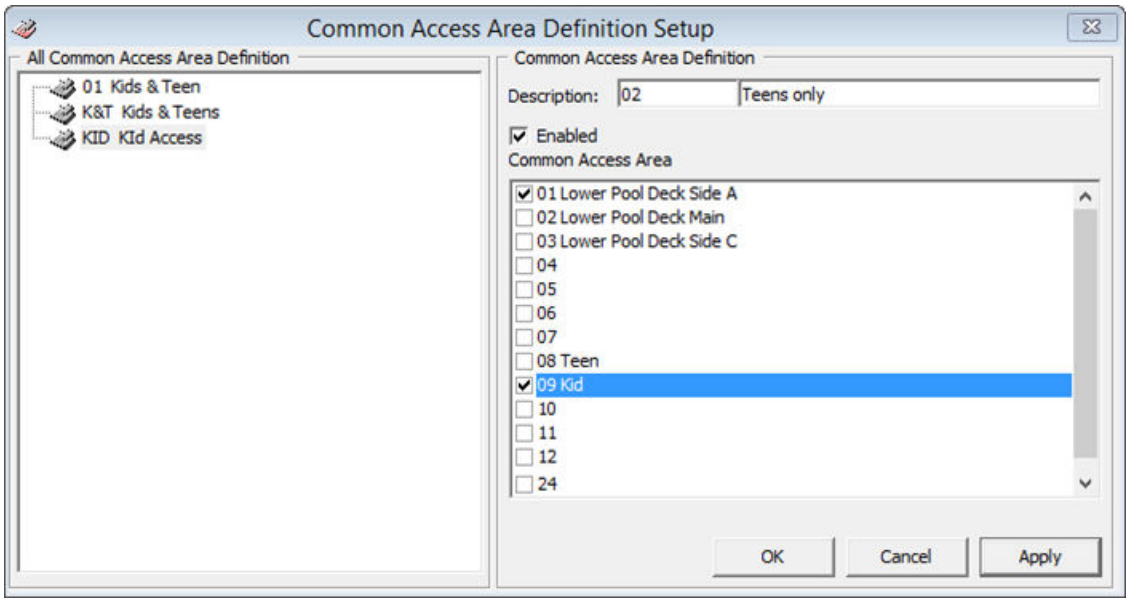
Common Access Area Name

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 9-34 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.

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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 9-13 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.
eOne Disable Contingency Mode Reason Code	Defines the reason use when disabling contingency mode.
Nationality Flag	Defines the additional Nationality Flag for Crew.

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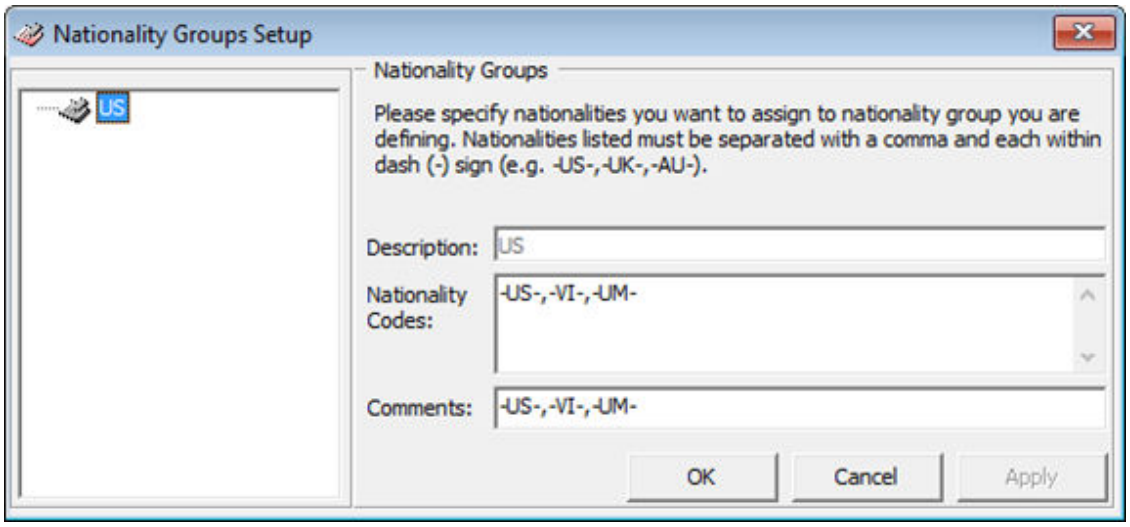
Setting Up System Codes

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 9-35 Nationality Groups Setup

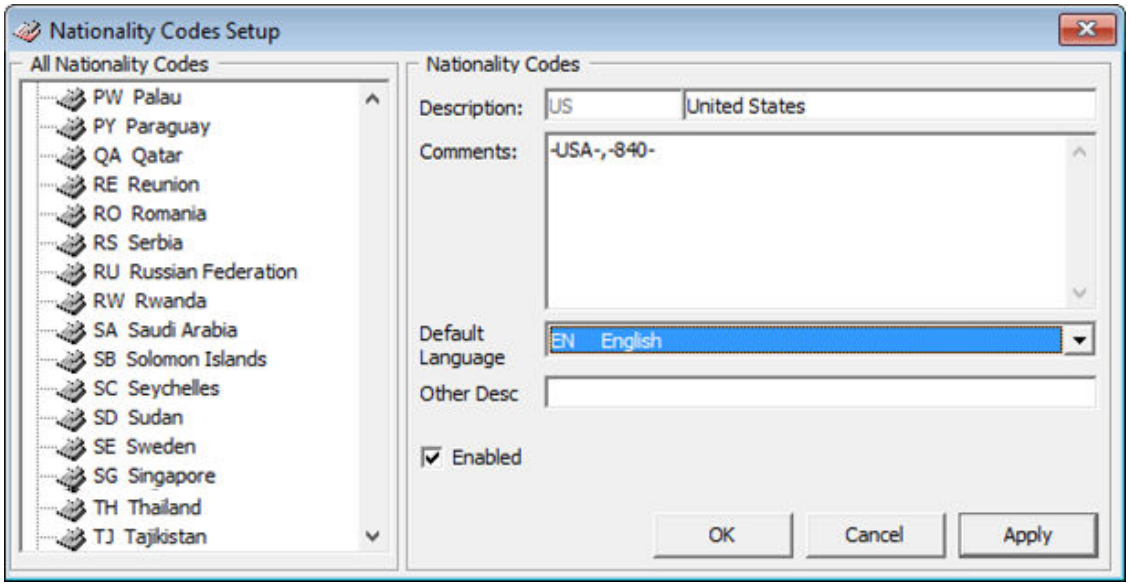


1. From the System Codes menu, select the **Nationality Groups**.
2. In the Nationality Setup window, right-click the **blank space** at the left panel and select **Add Nationality Group**.
3. Enter the **description**, the **Nationality Codes** with a hyphen (-) before and after the code , and a **comma**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

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Setting Up Nationality Codes

Figure 9-36 Nationality Codes Setup



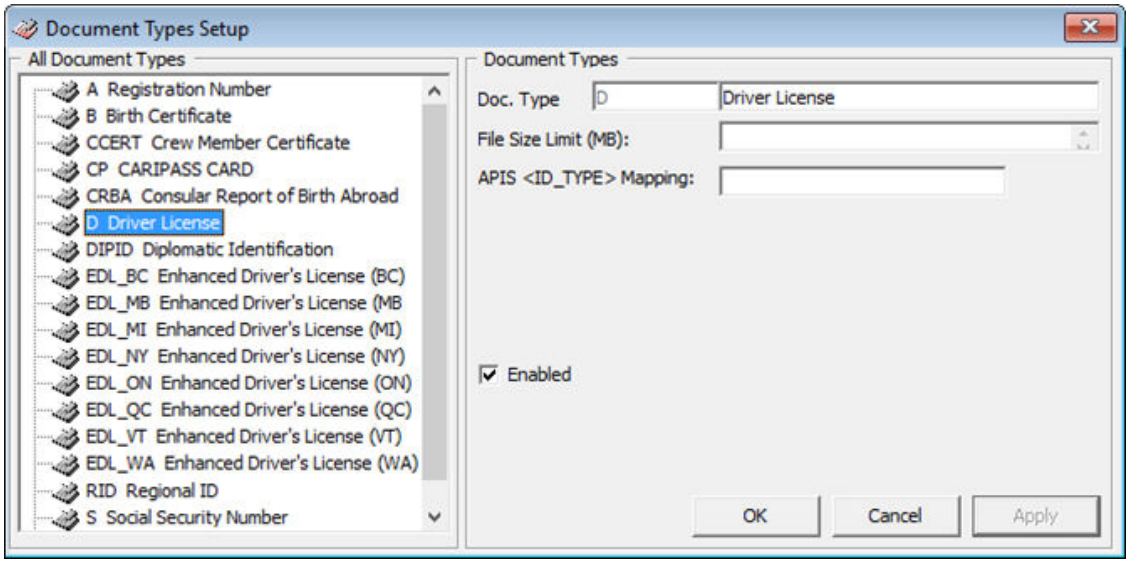
A set of standard ISO nationality code is pre-installed in the system. The steps to configure the Nationality Codes is the same as the above. You can define the language use for each nationality code by changing the default language.

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.

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Figure 9-37 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.

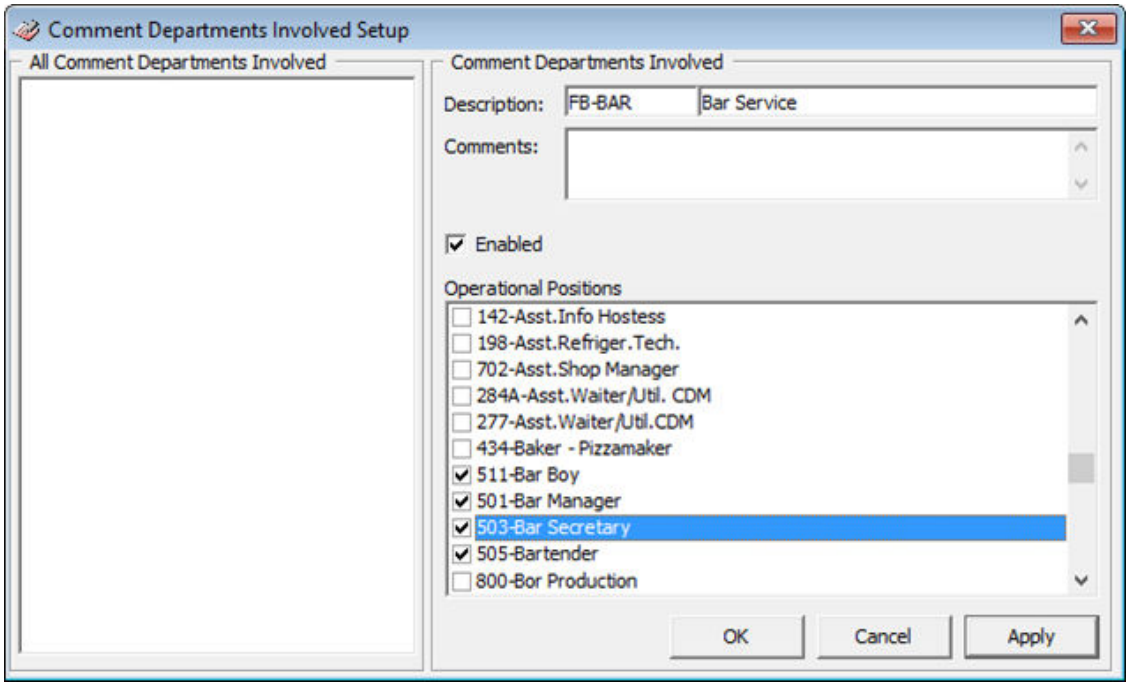
1. Select the **General Reason Codes** from the System Codes menu.
2. Right-click the **blank space** on the left panel and select **Add New**.
3. Enter the **Code, Description**, and the **Comment**.
4. Select the **Module** from the drop-down list if it is module specific.
5. Click **Apply** to save.

Setting Up Comment Departments

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

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Figure 9-38 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** checkbox, and clicking **OK** to save.

Package Plans

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

Setting up a Package Plan Template

The setup of the Package Plan elements will determine the package value, its entitlement and the correct reduction of 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.

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PAR_GROUP Package

Table 9-14 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
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. *This applies to reservation import only.*

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Table 9-14 (Cont.) Parameter Group Package

PAR Name	PAR Value	Description
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.

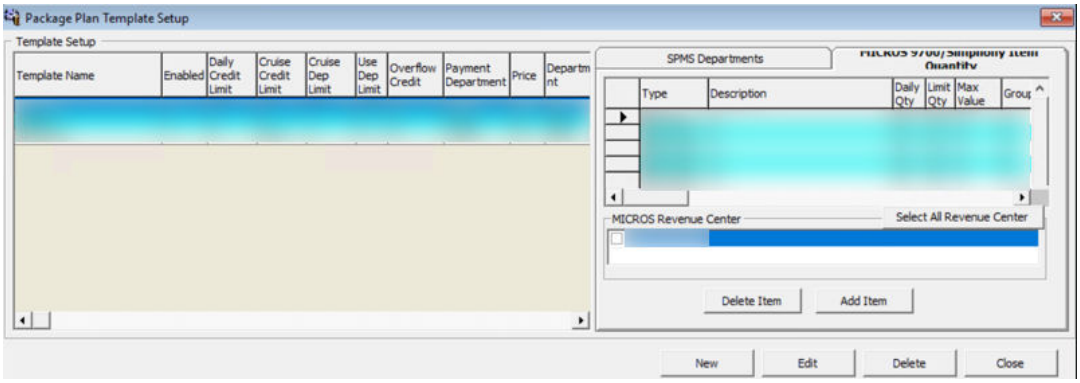
Defining a Package Template

A template is set up with a minimum required fields, and is used as a base for new package plan. To setup,

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

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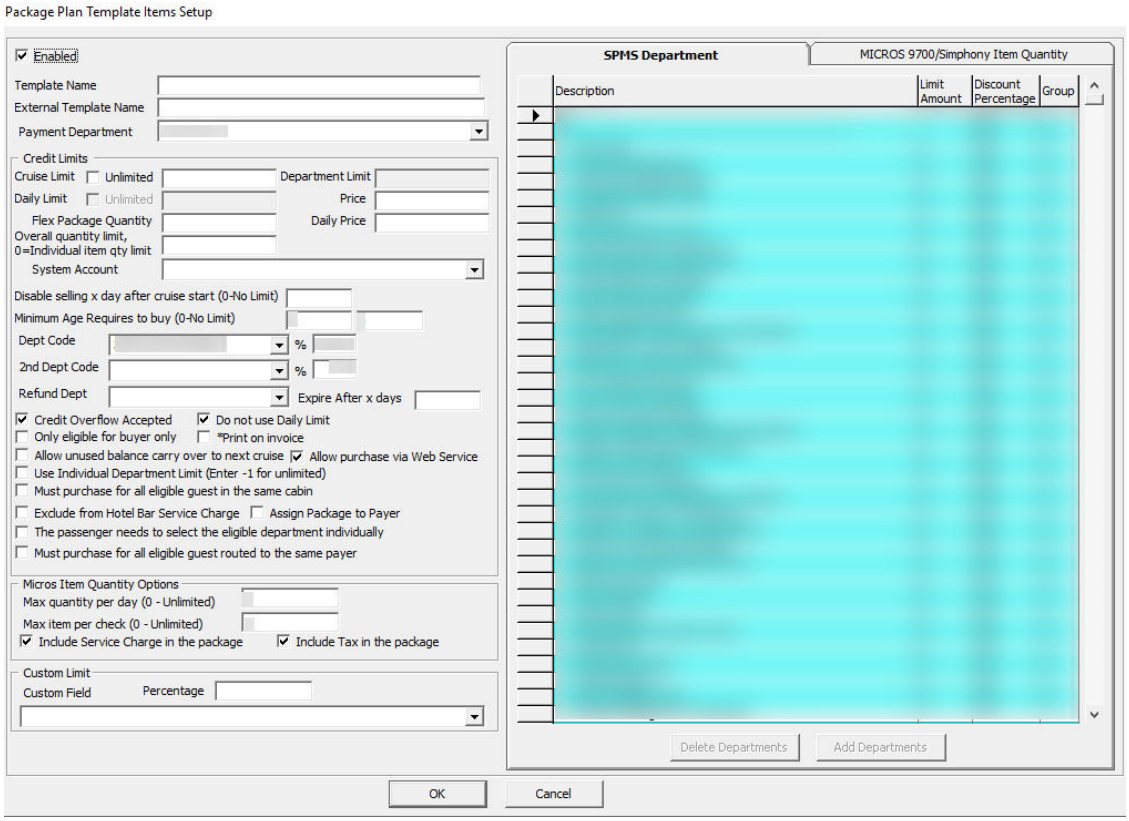
Figure 9-39 Package Plan Template Setup



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

Package Plan Template

Figure 9-40 Package Plan Template



Field Definitions

Below table describes the available fields in Package Plan Template.

Field Definitions for Package Plan Template

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Table 9-15 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 *not* 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).
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 Simphony 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.

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Table 9-15 (Cont.) Field Definitions for Package Plan Template

Field Name	Field Definitions
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**.
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 `pos_exclude_sevchg=1`.
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	

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Table 9-15 (Cont.) Field Definitions for Package Plan Template

Field Name	Field Definitions
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	
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/Simphony Item Quantity	
SPMS Department/Micros 9700/Simphony Item Quantity	Defines the department and quantity to be included in the package.

Adding SPMS Department 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.

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

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

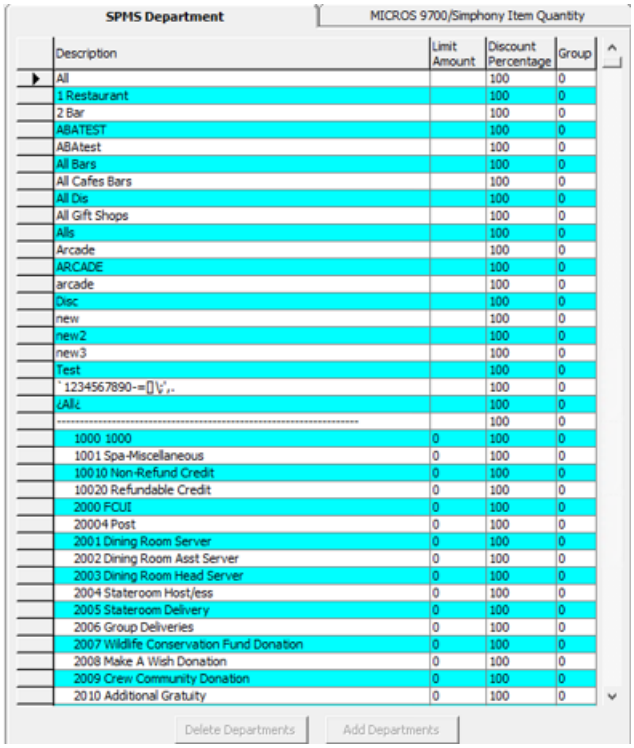
1. In the **Package Plan, Template Setup**, select the template name from the list.
2. Click **Edit**.
3. In the **Micros 9700/Simphony Item Quantity** tab, select the **Revenue Center**, and then click **Add Item**.
4. Choose the menu item to display using the radio button. At the top of the Add Micros 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.
7. 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.

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

Figure 9-41 Adding SPMS Departments



4. Enter the limit by double clicking on either the **Limit Amount, Discount Percentage**, or **Group**.

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- **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.

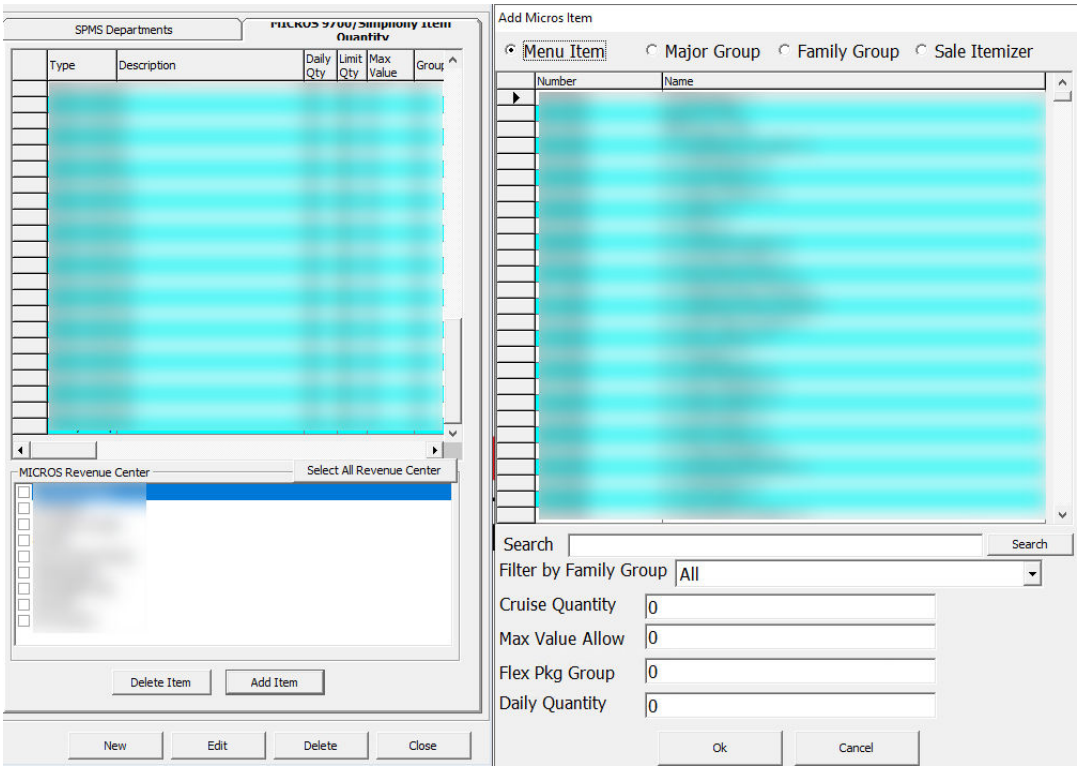
5. Click **OK** to save.

Defining MICROS 9700/Simphony Item Quantity Limit

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

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

Figure 9-42 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**.

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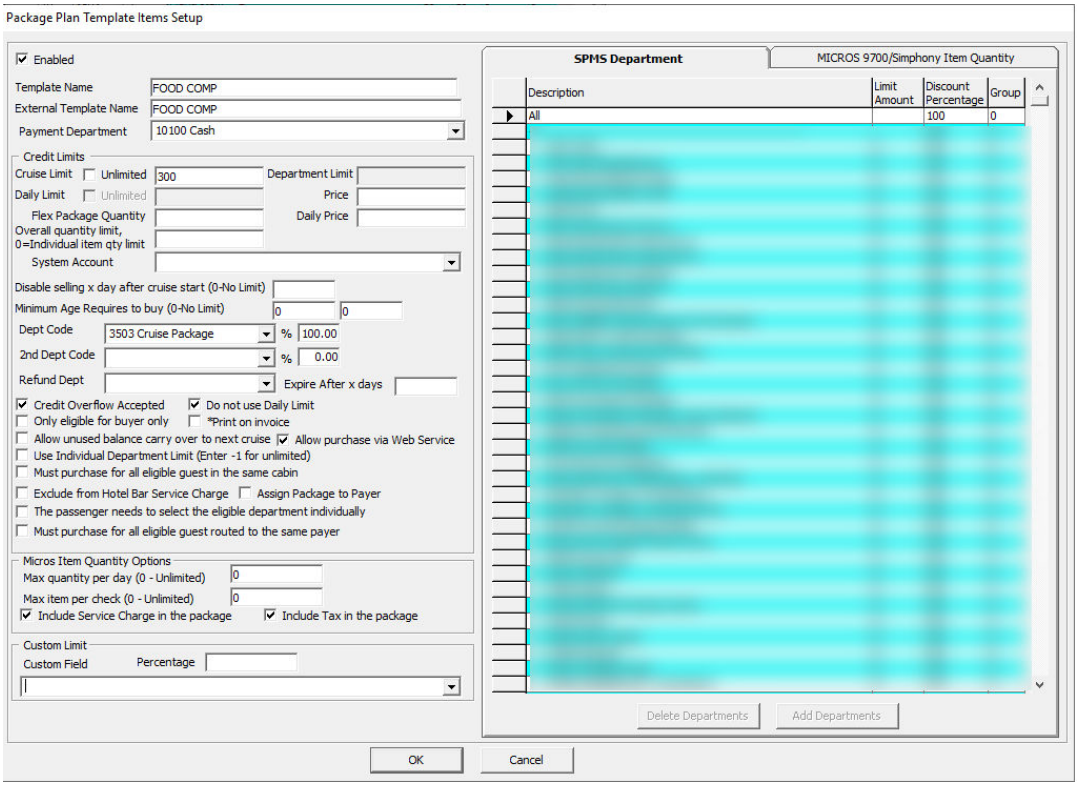
Configuring Package Plan

Setting Up a Basic Non-Selling Price Package

A Basic Non-Selling Price Package is an allowance given by the Ship to the guest in a package form, comprising of a selection of department codes, has a cruise limit and the package is not for sale. Below is an example to set up a package comprising 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 set the cruise limit at $300.
5. Select **All Foods** under SPMS Department to add all the sub-department classified in the food category.

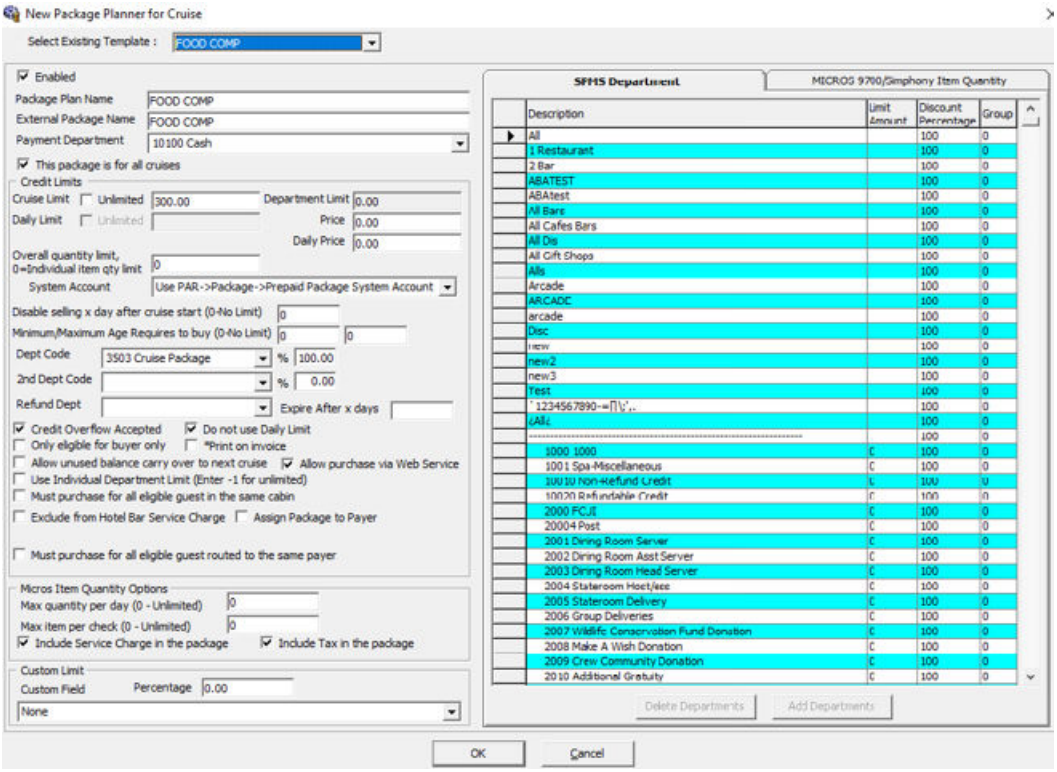
Figure 9-43 Package Plan Template - Item Setup



6. Click **OK** and exit from the Template Setup.
7. 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**.

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Figure 9-44 Example of Basic Non-Selling Price Package



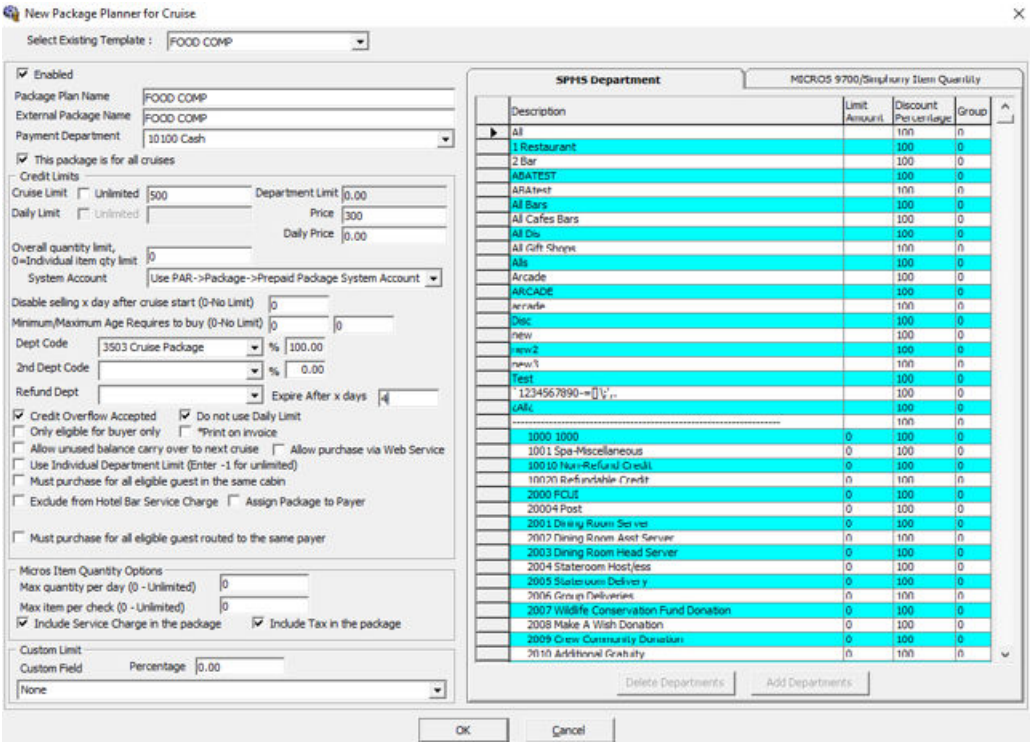
Setting Up a Basic Selling Price Package

A Basic Selling Price Package is a price-based package that comprises of a group of departments, for example, all food or all beverage department. This type of package is sellable and has a spending limit. Below are the steps to set up a sellable package using the template created earlier. In this example, the package is for all Food department with a spending value of $500 and the selling price at $300.

1. Repeat steps 1 to 8 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**, to $500 and enter the selling **Price** at $300
6. Enter the number of days in **‘Disable selling X day after cruise start’**, if you wish stop the selling of the 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**.

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Figure 9-45 Example of Basic Selling Price Package



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 set the cruise limit at $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

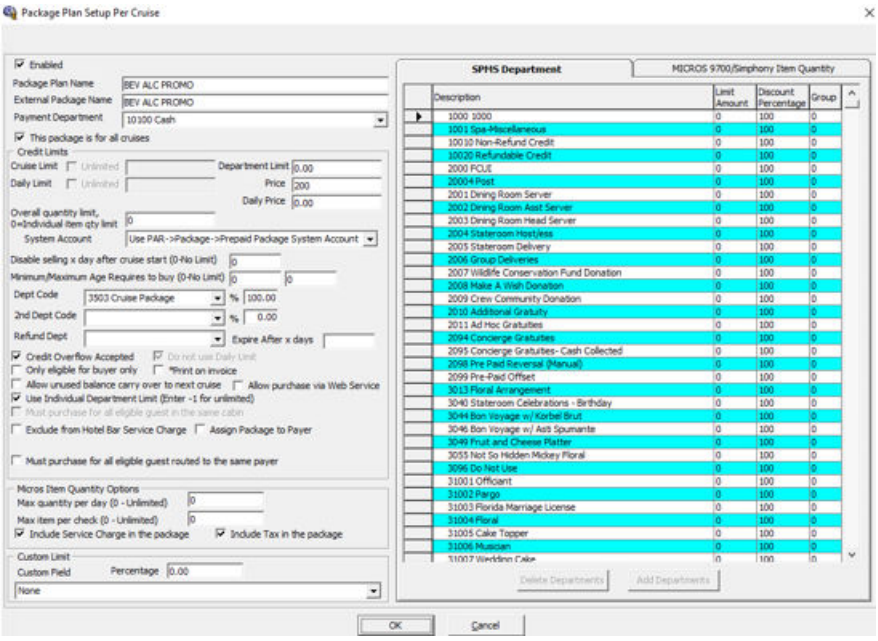
The Flexi Selling Price Package function is similar as the Basic Selling package. The only exception is, it provides user the flexibility in choosing the department to be included in the

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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 8 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** to $300 and enter the selling **Price** at $200.
6. Click **OK**.

Figure 9-46 Example of Flexi Selling Price Package



Setting Up a Quantity Non-Selling Price Package

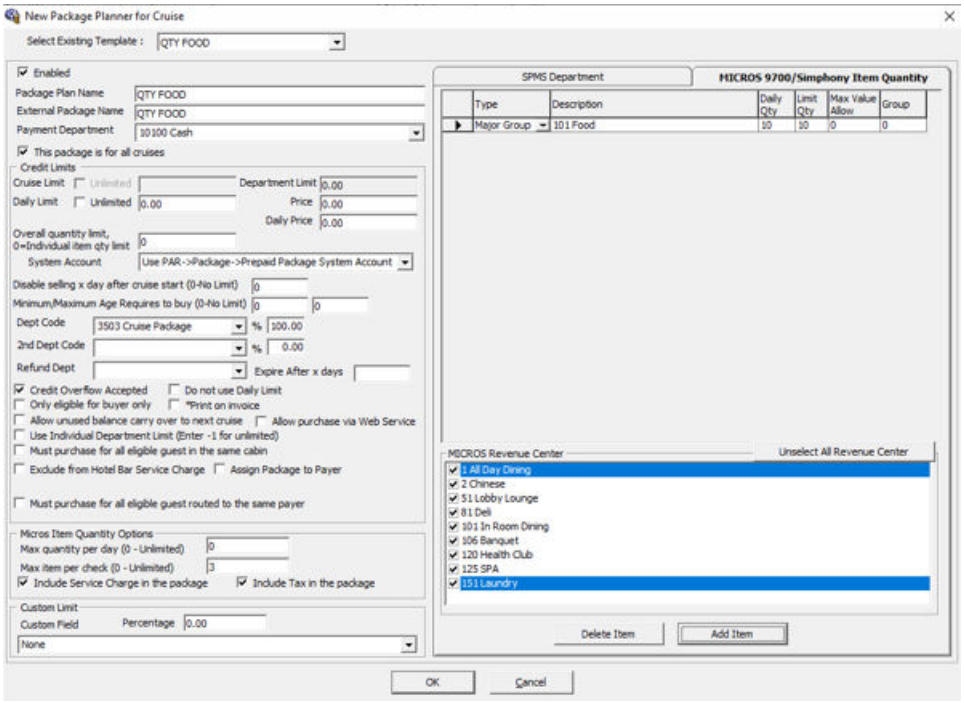
The Quantity Non-Selling Price Package function is similar as the Basic Non-Selling package, and this package works in tandem with POS Systems. This type of packages has a limit set on item quantity allowed per day, per check, or per cruise from the POS System. Below is an example for a package that 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/Simphony Item Quantity tab, select all revenue center this package is eligible to, and then click **Add Item**.
6. In the **Add Micros Item** window, select **Major Group**, and then highlight all the items under the group.

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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 9-47 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 POS 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.

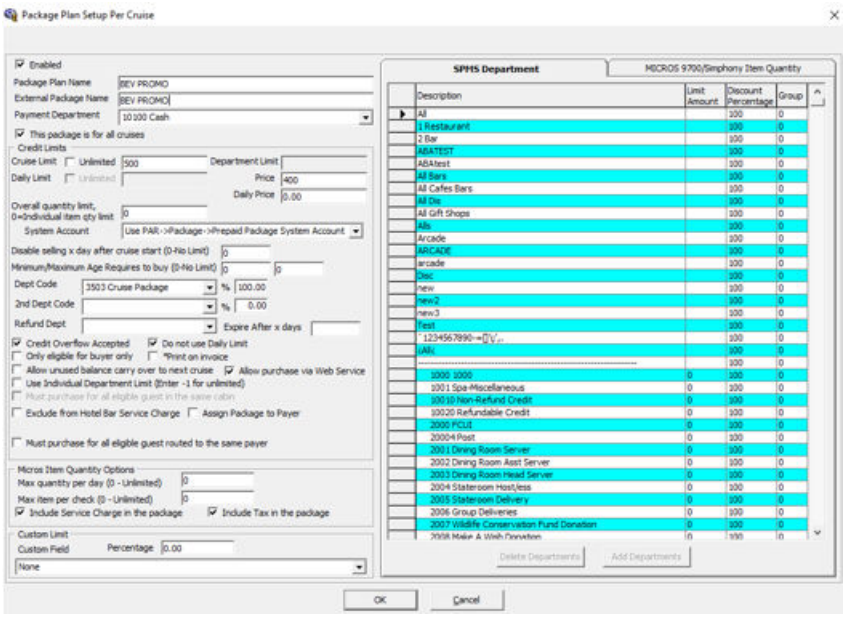
1. Select **Administration** from the menu.
2. From the drop-down menu, select **Package Plan**, and then select **Template Setup**.
3. Click **New**.
4. Name the template and define the cruise limit, and selling price, e.g.:$500 and $400 respectively.
5. In the SPMS Department tab, select the department group, and then navigate to Micros 9700/Simphony Item Quantity tab, and select all revenue center this package is eligible to, and then click **Add Item**.
6. In the **Add Micros Item** window, click the **Sales Itemizer** radio button, and then highlight **Sales Itemizer 1**.

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7. Enter the **Cruise Quantity** and the **Maximum value**, e.g.: Quantity 5 and value is $100.
8. Click **OK**. Exit from the Template Setup, and then navigate to **Package Plan Setup**.
9. In the **Package Plan Setup**, click **New**

   to add the package for cruise, making them available for sale or to be assigned.
10. Select the template created earlier by quantity from the drop-down list, and then click **OK**.

Figure 9-48 Example of Mixed Selling Price Package



Setting Up a Mixed Selling Package

The Mixed Selling Price Package is a combined package of quantity and flexi base package where user is able to select the department codes or POS Items to include in the package when assigning or purchasing the package. Below is an example of a package that include All non-alcoholic Beverage department with the cruise limit of $500, selling price at $400, and Major POS group selection.

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, and selling price at $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/Simphony 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.

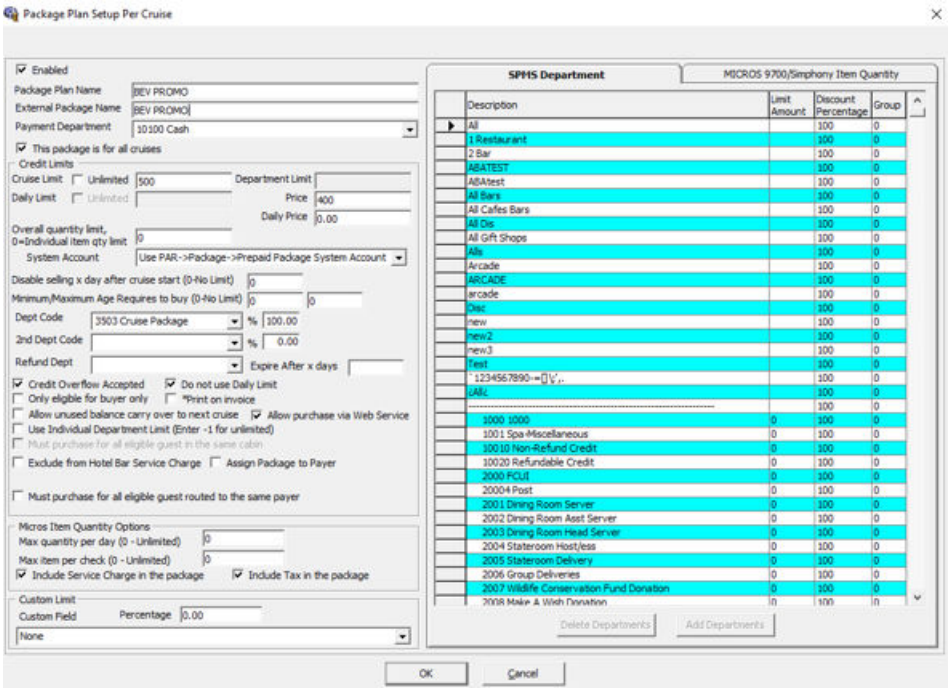
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> **Note**
>
> The total number is based on Micros/Simphony Department setting.

8. Enter the **Cruise Quantity** of the selected item and the **Maximum value allowed**, for example 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**.

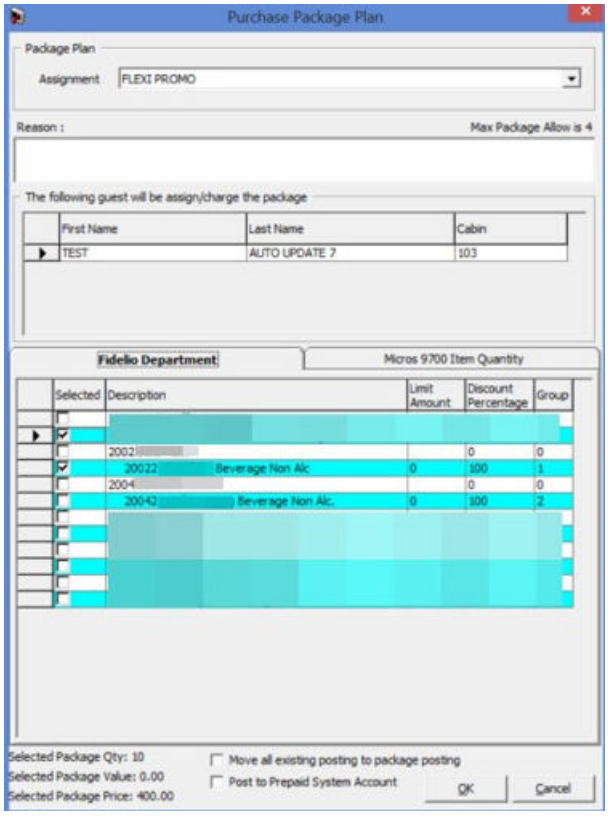
Figure 9-49 Example of Mixed Flexi Price Package



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.

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Figure 9-50 Flexi Package Plan Selection Screen



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.

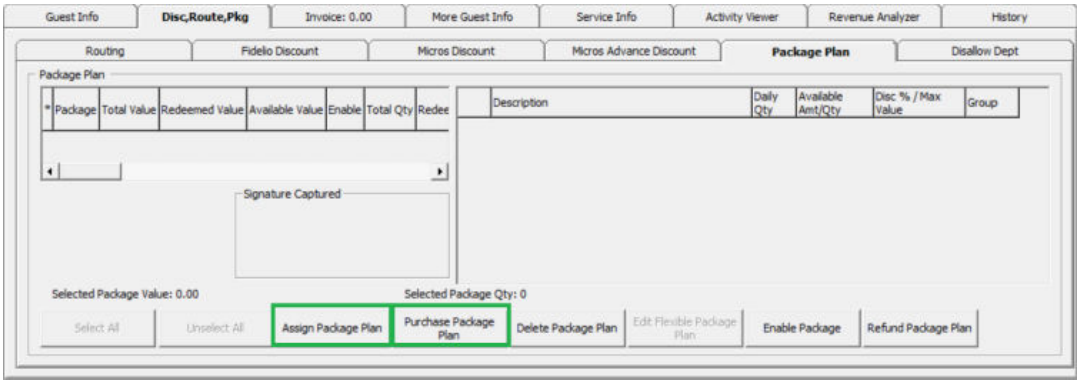
Assigning/Purchasing a Package Plan

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.

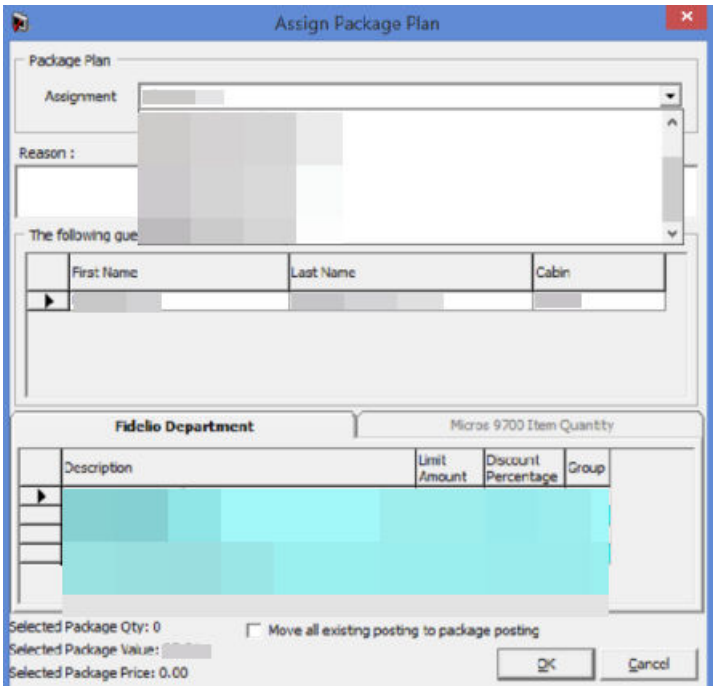
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Figure 9-51 Package Plan Options



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

Figure 9-52 Package Plan Assignment Screen

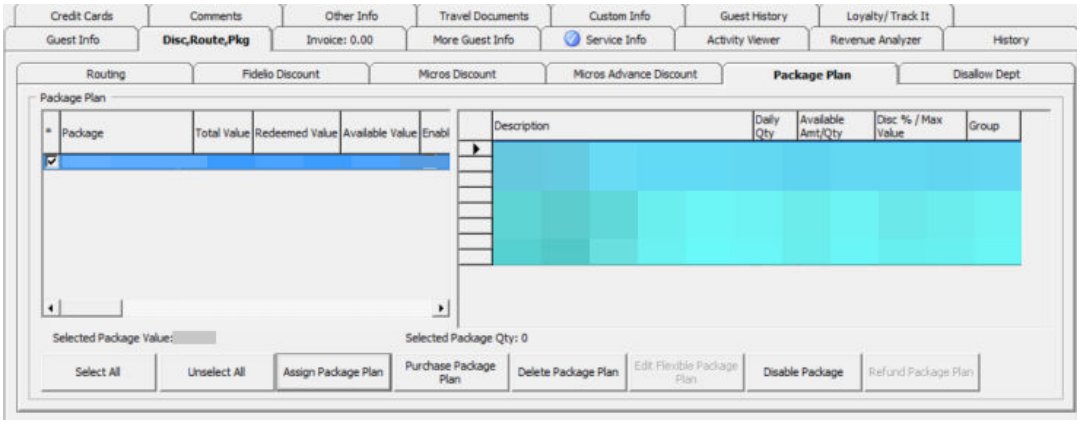


> **Note**
>
> Only check *'Move all existing posting to package posting'* when you wish to move the existing posting to package plan. For example: A guest purchased the package part way through the cruise, and past posting that meets the package elements are to be considered as package plan.

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

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Figure 9-53 Package Plan Assigned/Purchased

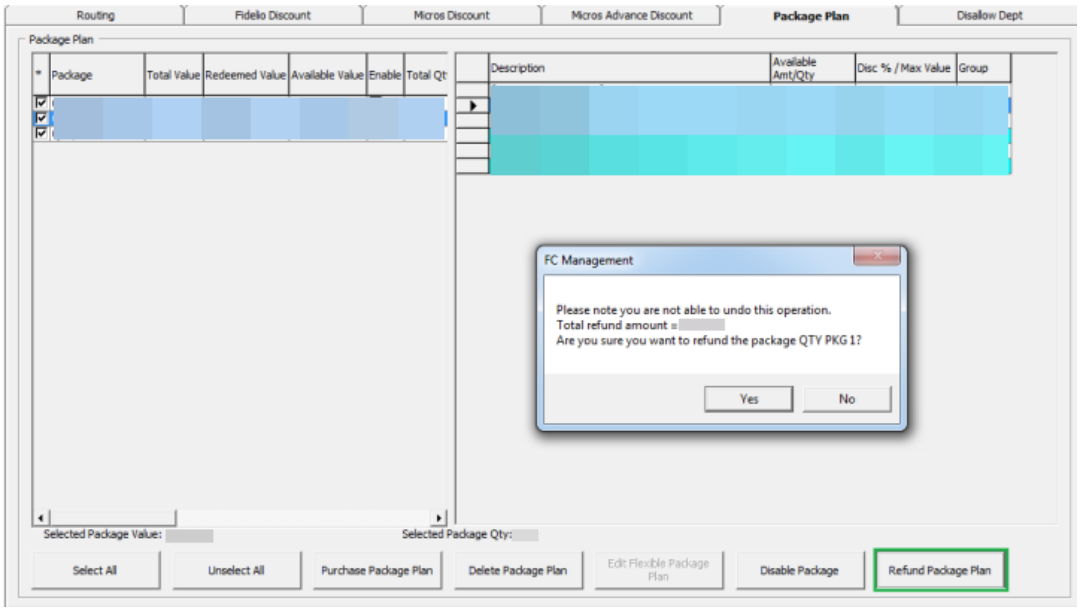


Refunding a Package Plan

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 9-54 Package Plan Refund Option



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

6. 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

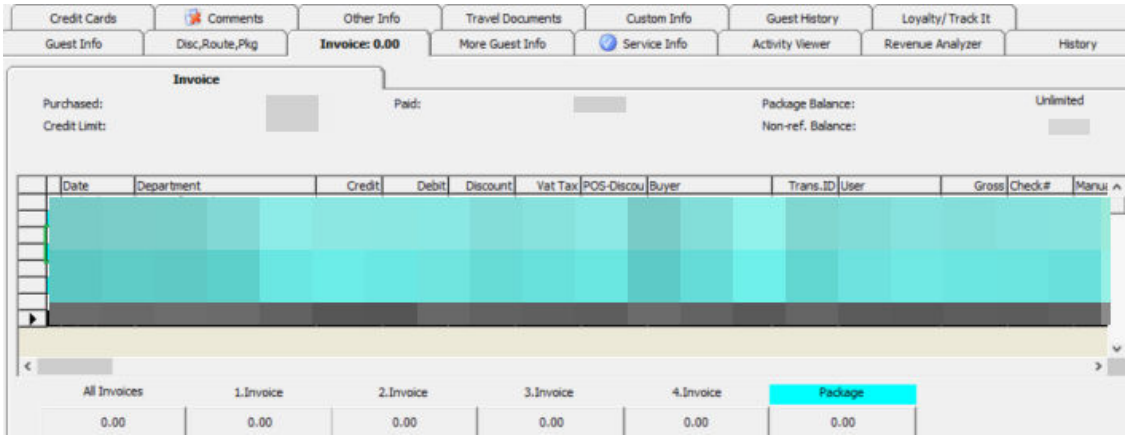
Routing of a package plan posting are dependable on two parameters; **Do not allow post package to both buyer and payer** parameter and **Package Plan Before Routing** parameter.

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 9-55 Package Plan Invoice Screen



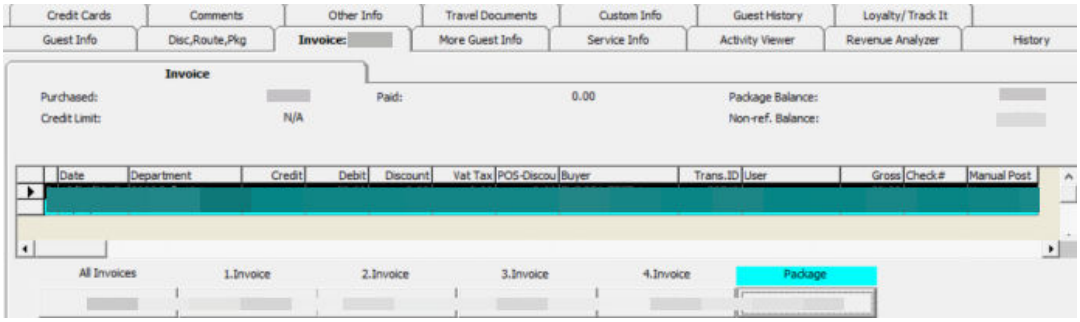
If the above parameter is set to 0, manual balancing of the package invoice/account is required using the **Pay Invoice** function.

To Manually Balance a Package Invoice

1. Log in to **Management** module, and select **Cashier** on the menu bar.
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 the **guest name** or **cabin number**.
4. Navigate to the **Invoice** tab, and then click the amount button under the Package Invoice.

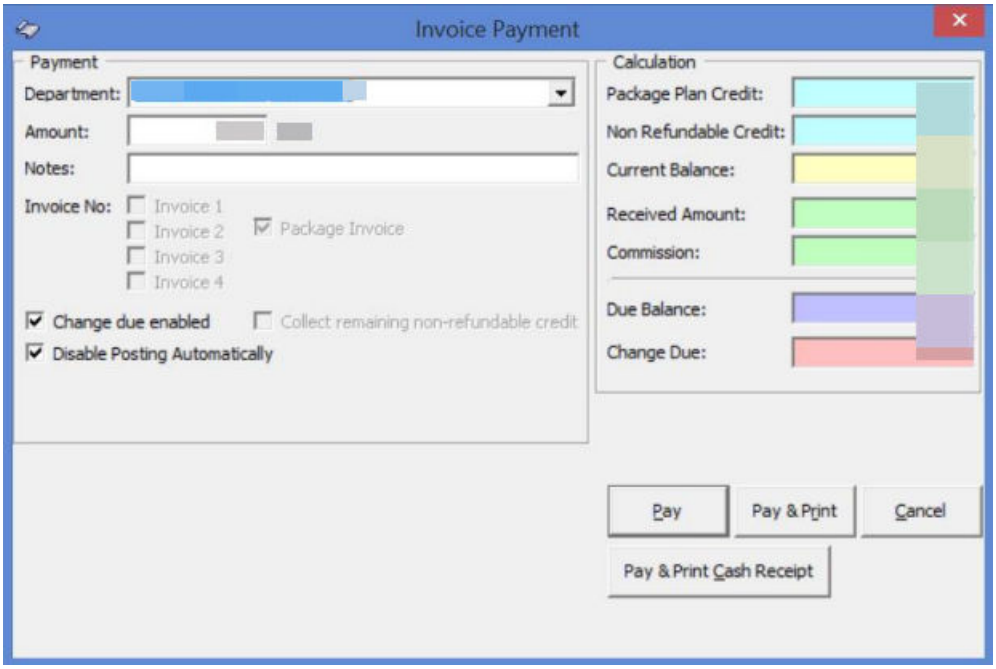
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Figure 9-56 Settling a Package Plan



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 9-57 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 Simphony 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 Simphony Interface

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

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PAR_PROMO

Table 9-16 Parameter Group Promo for Micros Server

PAR Name	PAR Value	Description
Micros Server Name		Micros Database Service Name / OpenID Connect (OIDC) URL
Micros Server Type		Database Platform Simphony is installed on: 0 - Oracle 1 - Microsoft SQL Server
Micros User Name		Micros User Name / OIDC User Name.

To Set Up the Simphony 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**, and **Micros User Name**.

> **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 Simphony 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

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Figure 9-58 Simphony Data Extension Table



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**.

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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 9-59 Sample Data Import Fields

Advanced Package Plan Setup

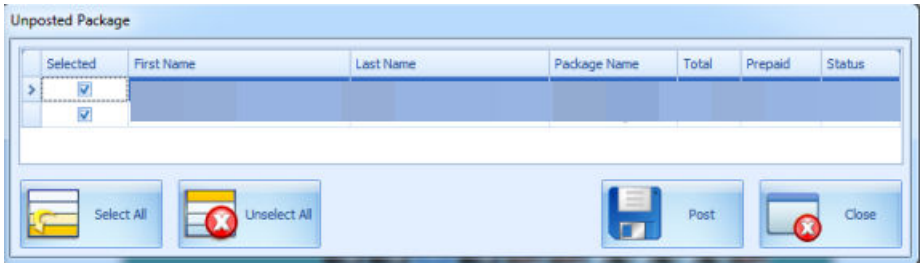
ID	Description	Length	Data Type	Date Format	Reservation Ref	Advanced Package Plan Ref	Handle Type Ref	Delete	Use for Compare
1	GUESTID	10	OTHERS		RES_V_GUESTID			0	0
2	PACKAGEID	20	OTHERS			PPP_PPN_ID			0
3	PREPAIDACCOUNT	10	OTHERS			PPP_ACC_ID			0
4	TOTAL	10	OTHERS			PPP_TOTAL			0
5	DEBIT	10	OTHERS			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 9-60 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**.

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Figure 9-61 OHC Tools - Import/Export Package Template

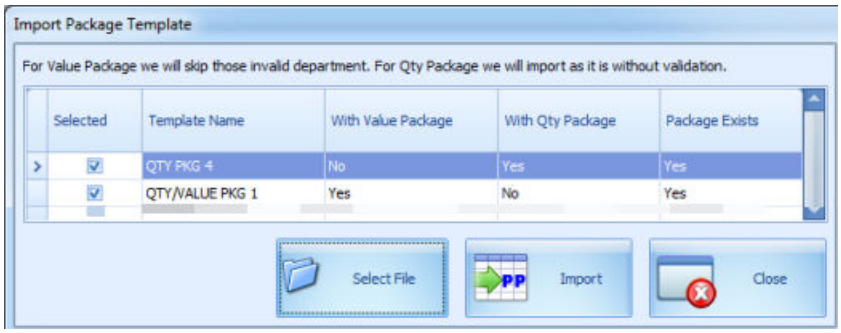


To Import a Template,

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 9-62 Import Package Template Screen



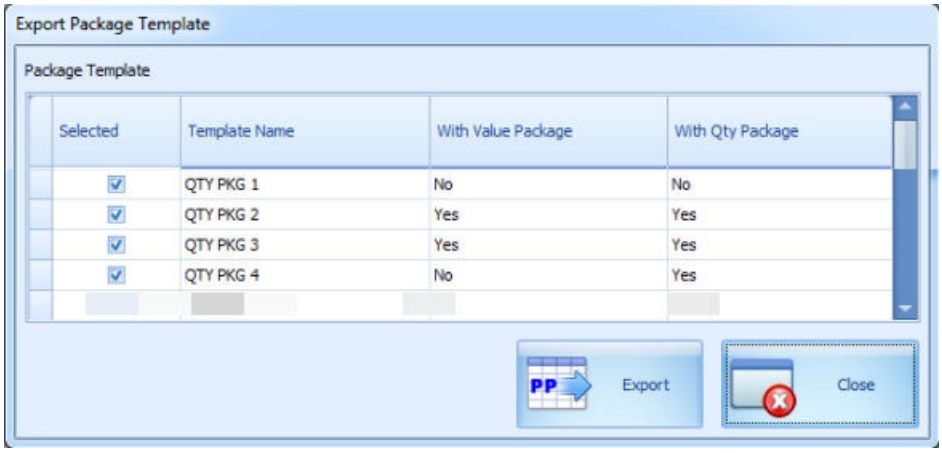
To Export a Template,

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.

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

Figure 9-63 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 9-17 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 POS 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

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- 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** defined, the 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 can move the item package posting to normal posting. When the posting is moved back to a package posting, it will become a Department package posting, if the department package posting is available.

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.

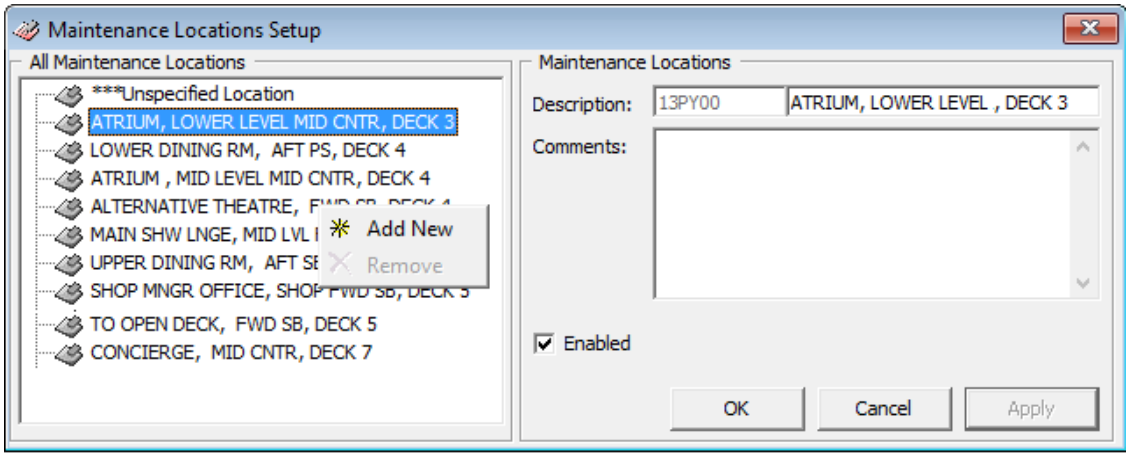
The steps to configure the codes below are the same while other codes such as Workers in Workgroup, Task Code, and Items require more steps.

- **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.

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Setting Up Maintenance Codes

Figure 9-64 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.

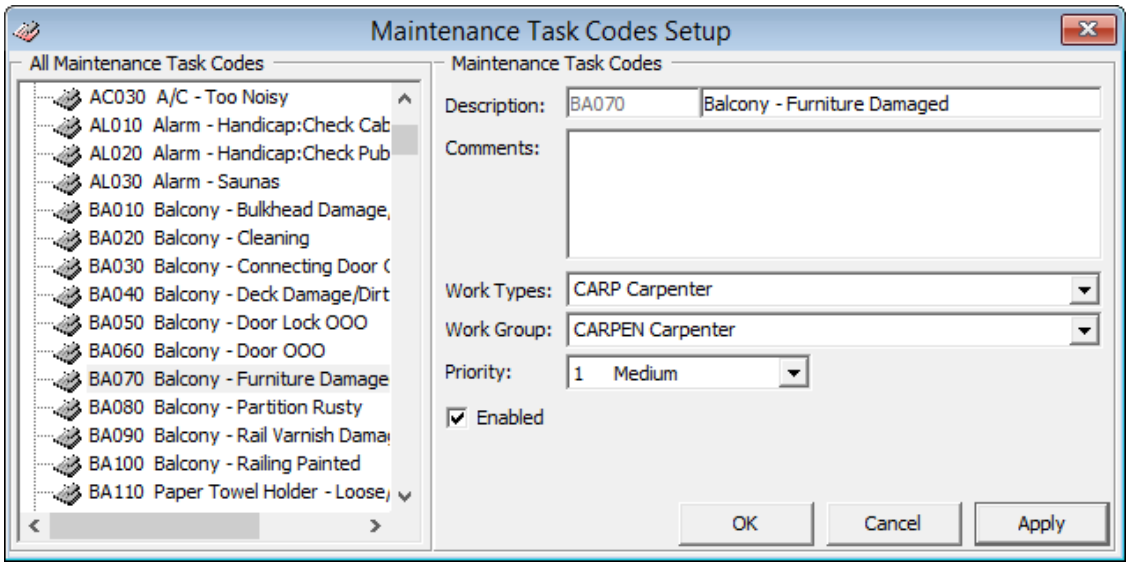
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5. Right-click on the newly created **code** and select **Add Worker**.
6. Select to **Assign by Crew** or **Assign by Operation Position**, then select the **crew name** or **position** from the **Name** field.
7. Enter a **description** and click **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 9-65 Maintenance Task Codes



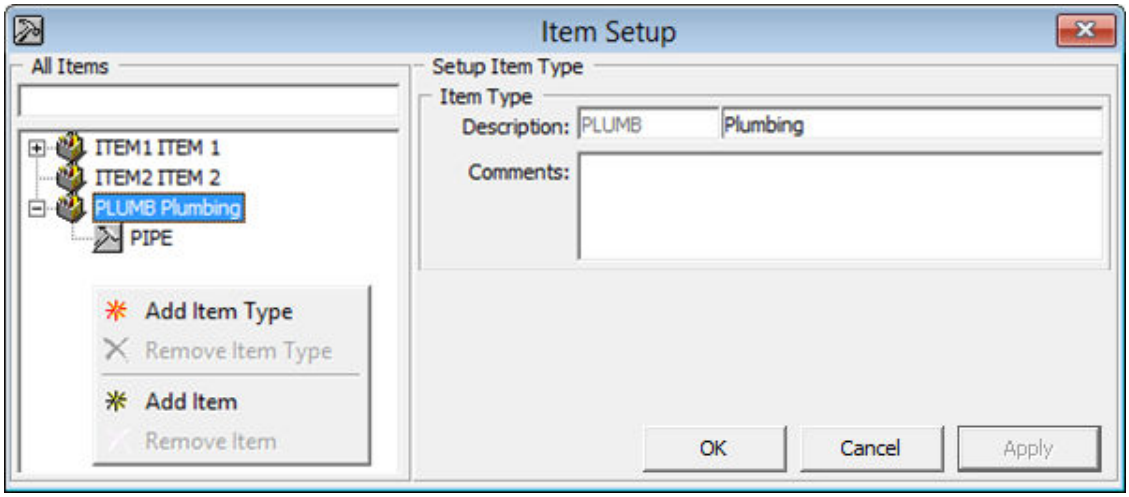
1. Select **Maintenance Task Code Setup** from the Maintenance Setup menu.
2. Right-click and select **Add New**.
3. Enter a **code, description**, and **comments**, and then select the **Work Types, Work Group** and **Priority** from the drop-down list.
4. Click **Apply** to save.

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.

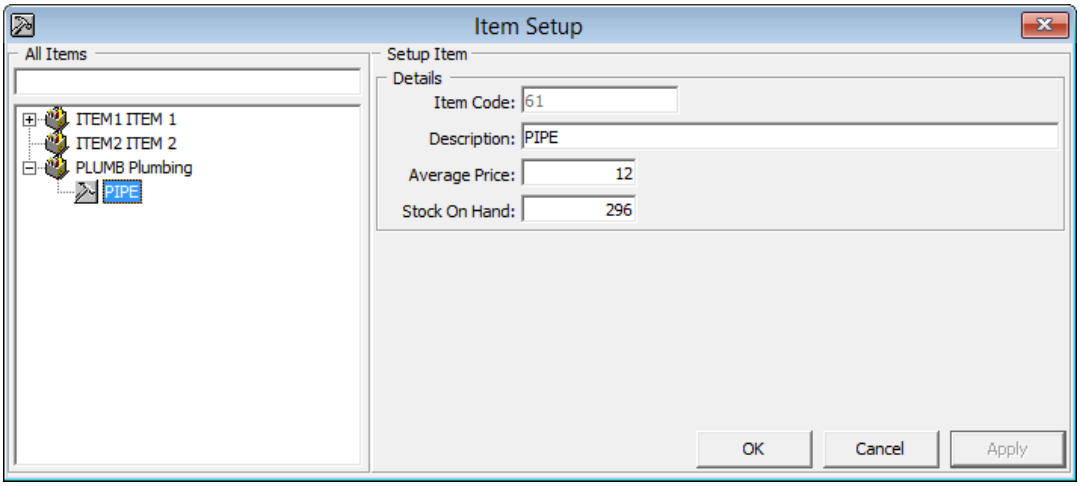
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Figure 9-66 Maintenance Item Setup



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 9-67 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.

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 topic Gift Card

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POS Discount

There are two methods of setting up the POS discount:

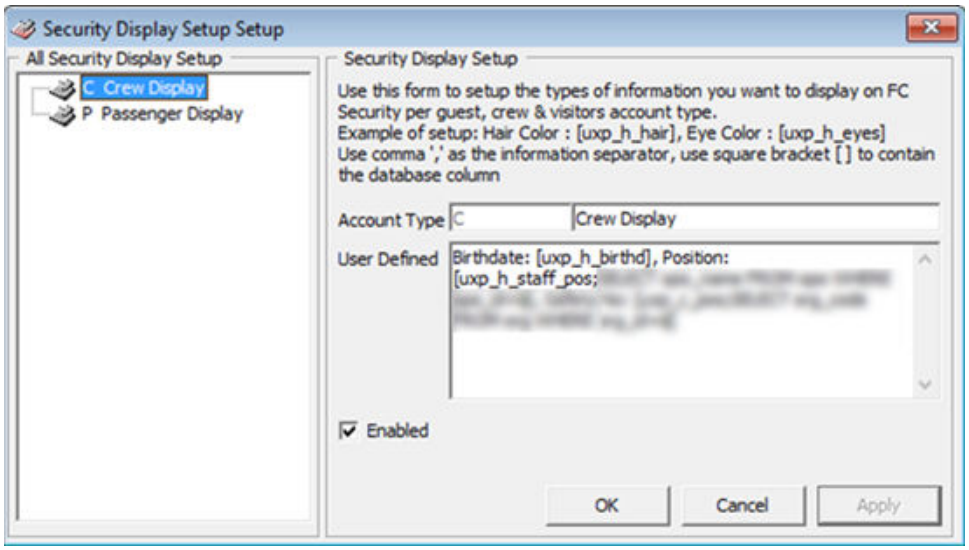
- A Basic Setup with discounts applicable to the POS discount itemizer level.
- An Advance Setup with discounts applicable to the POS major group, family group, and menu item level.

You can choose to set up with one or both methods to provide for different type of discounts. See POS Discount Handling topic for detailed information on how to configure the discounts, linking the Simphony Server, and usage.

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 9-68 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.

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.

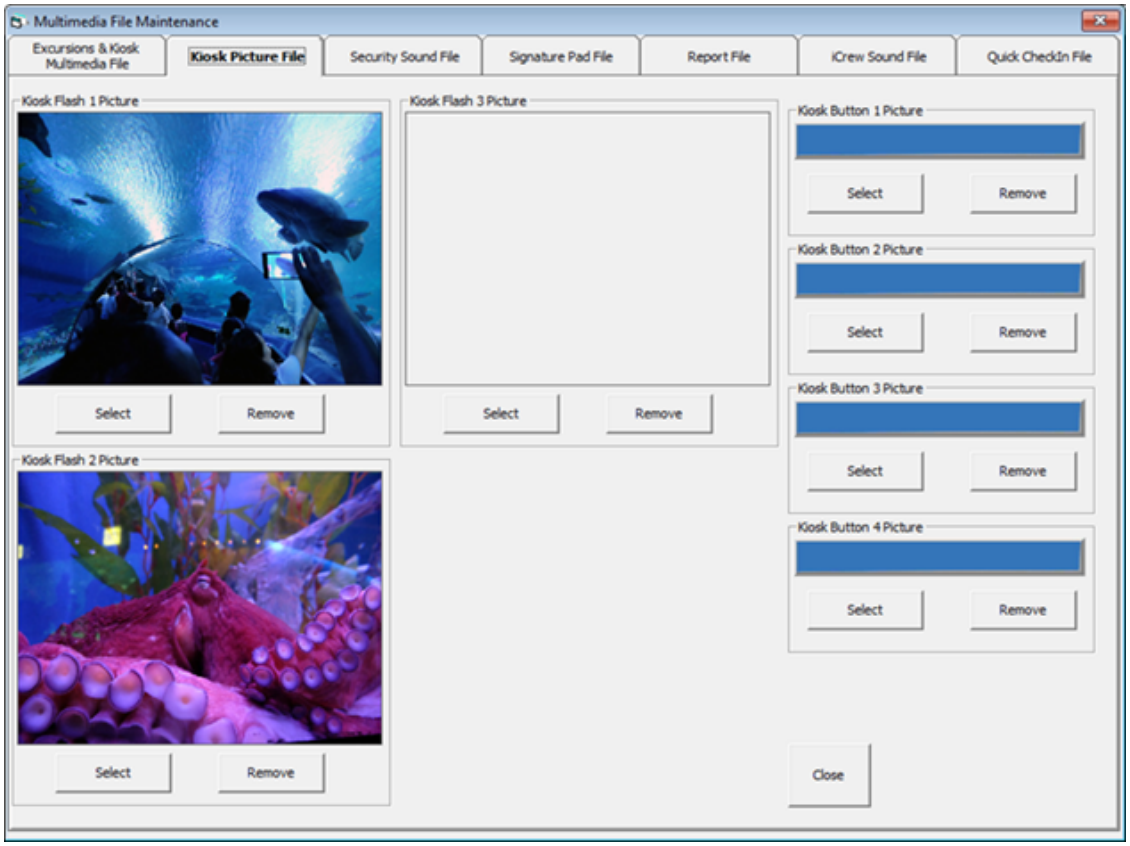
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2. Right-click the space on the left panel and select **Add New**.
3. Enter the **Code, Description** and **Comment**, if any
4. Click **OK** to save.

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 9-69 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.

Board Card Printing Template

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

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Figure 9-70 Board Card Batch Printing Template

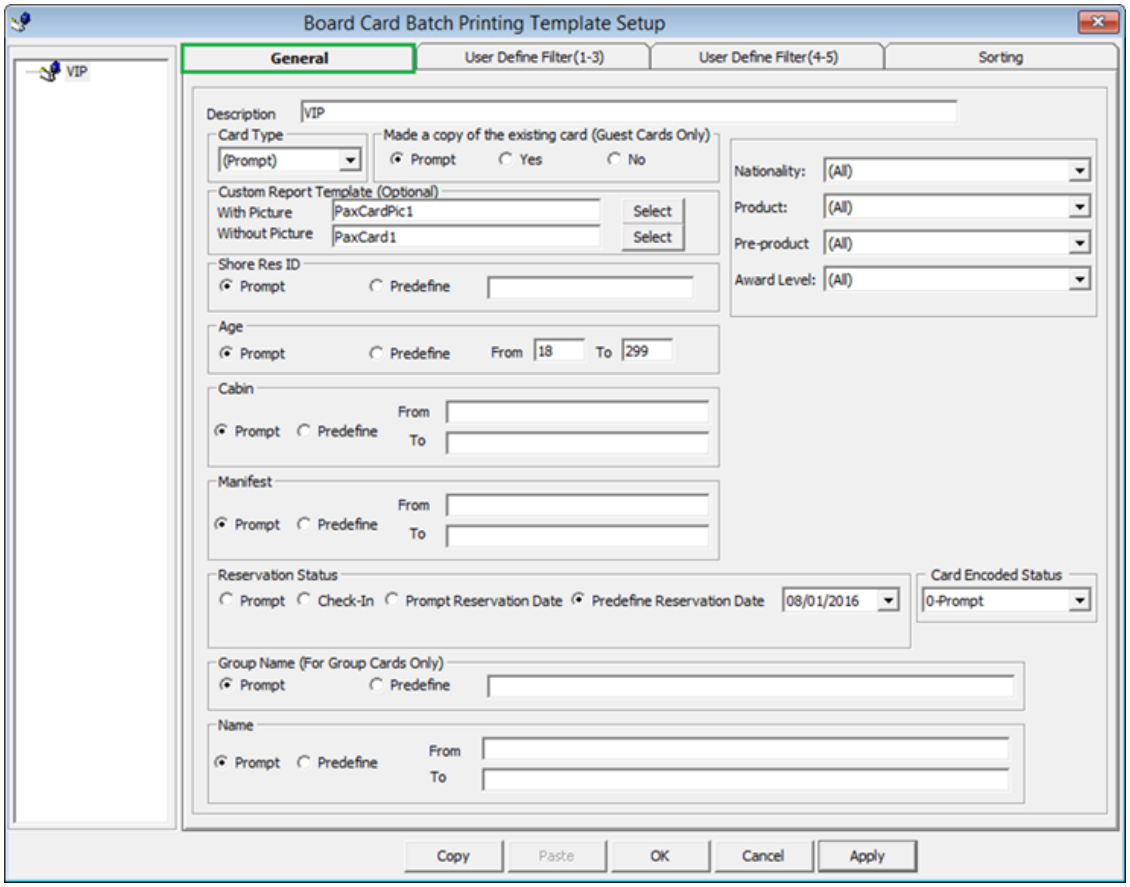


Table 9-18 Board Card Batch Printing Template Field Definition

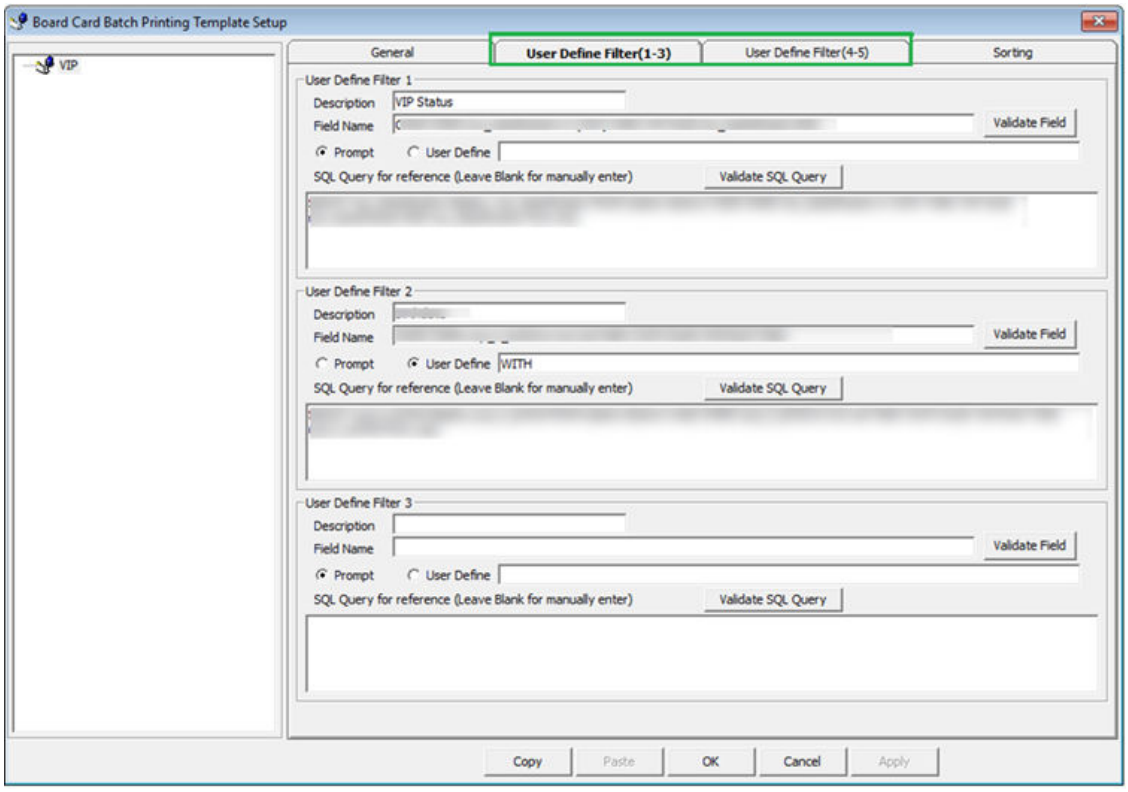
Field Name	Description
Description	Template Name.
Card Type	Type of card to print, for example: Guest, Crew, Group, Visitor, Gift Card or Prompt to define the criteria in Advance BCard Printing window.
Make a copy of existing card	Prints board card with the same account ID or new account ID.
Custom Report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

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Table 9-18 (Cont.) Board Card Batch Printing Template Field Definition

Field Name	Description
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 9-71 Board Card Batch Printing Template-User Define Filter

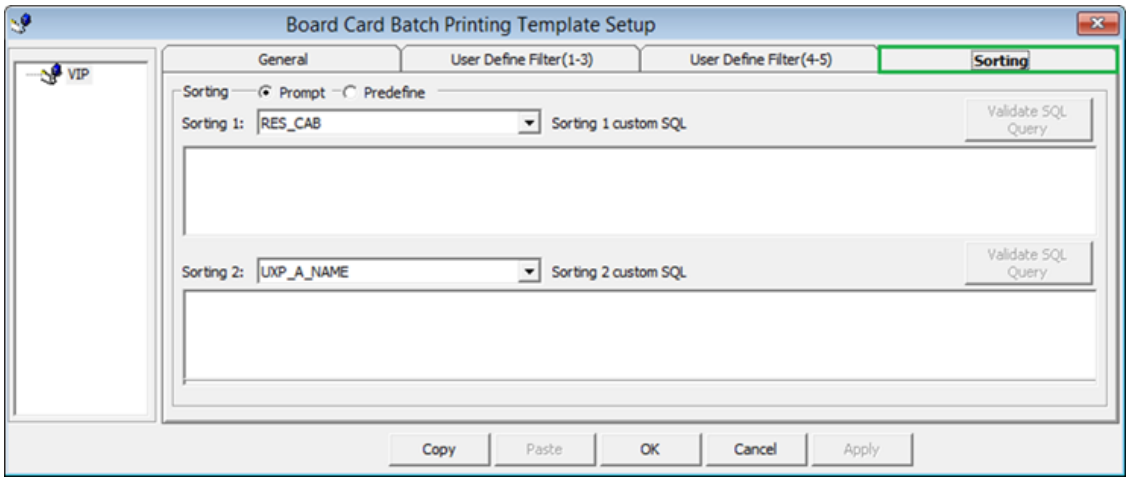


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Table 9-19 Board Card Batch Printing Template User Define Filter Field Definition

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 9-72 Board Card Batch Printing Template Sort Options



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.

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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**.

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.

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

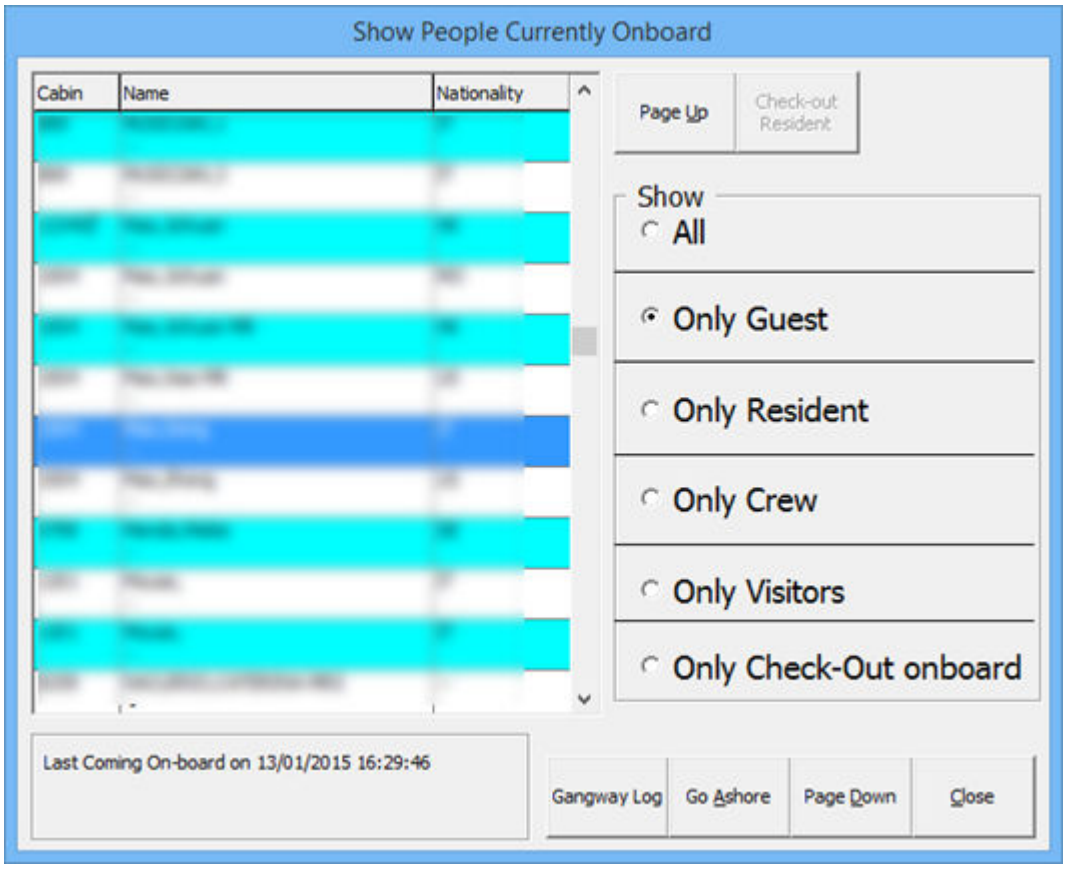
The Count Onboard/Shoreside gives you a total passenger count of those who are onboard or ashore and by the type of passenger you select. This count can be reset by clicking the **Reset Security** button.

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

Guest/Crew Onboard

Figure 9-73 Current Guest/Crew Onboard Listing



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.

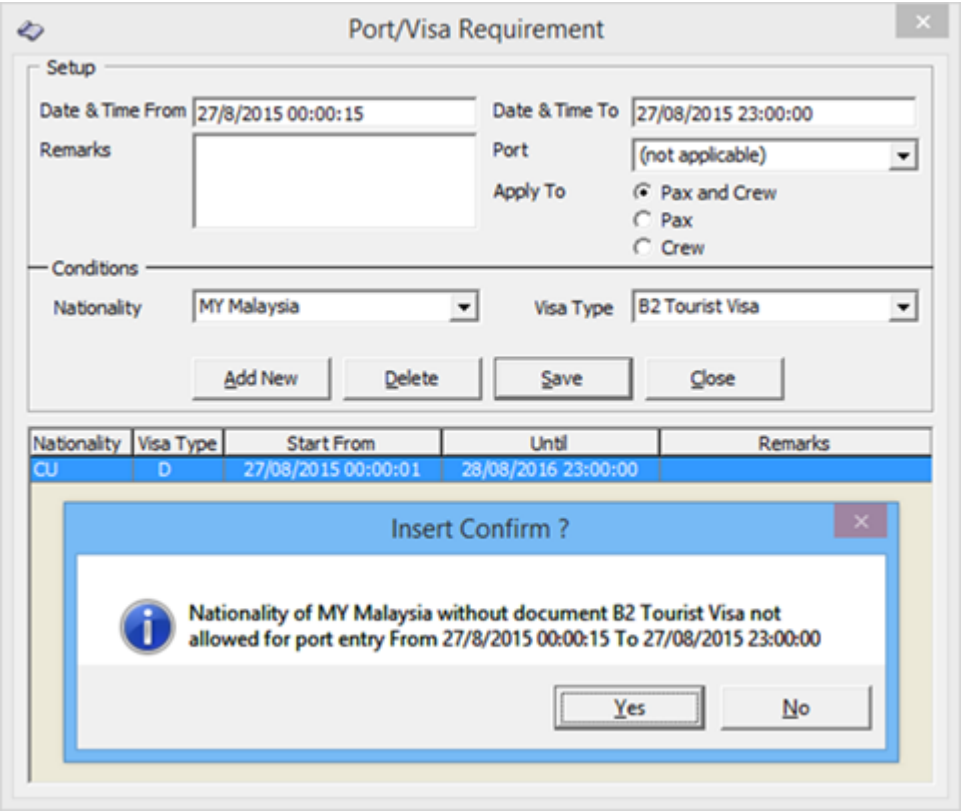
- Clicking **Go Onboard** sets the selected passenger status from Ashore to Onboard.

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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 9-74 Port/Visa Requirement Window



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.

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

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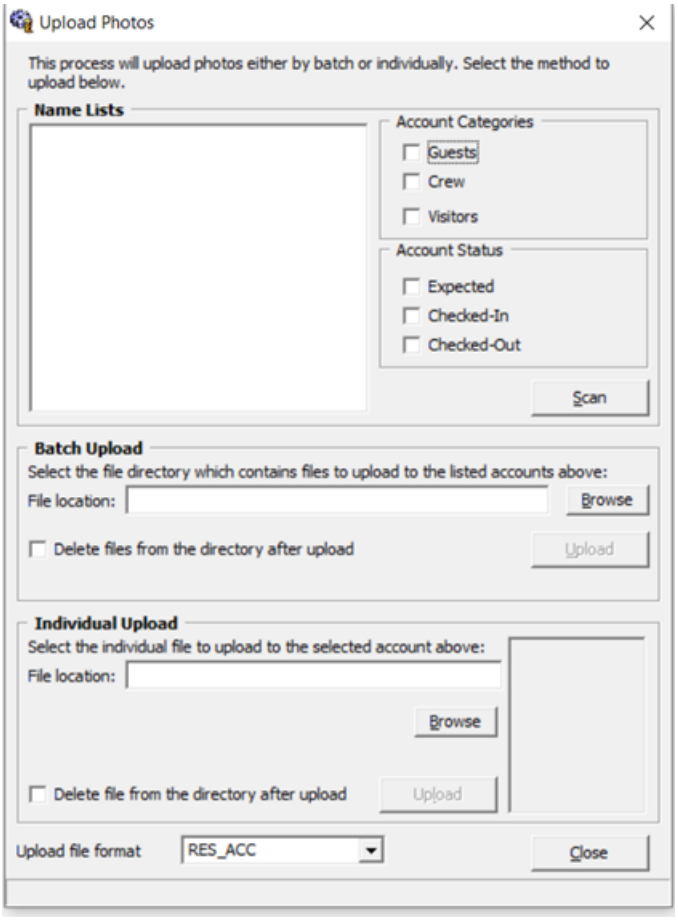
- Export Photos
- Export Documents

Upload/Export Photos

Upload Photos

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

Figure 9-75 Upload Photos



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.

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> **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.

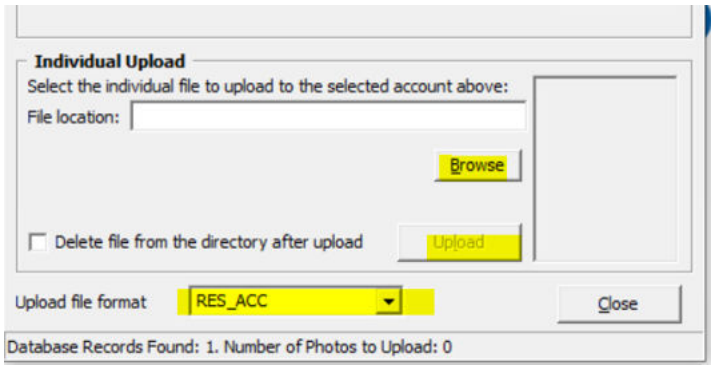
Batch Upload

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 9-76 Individual Upload



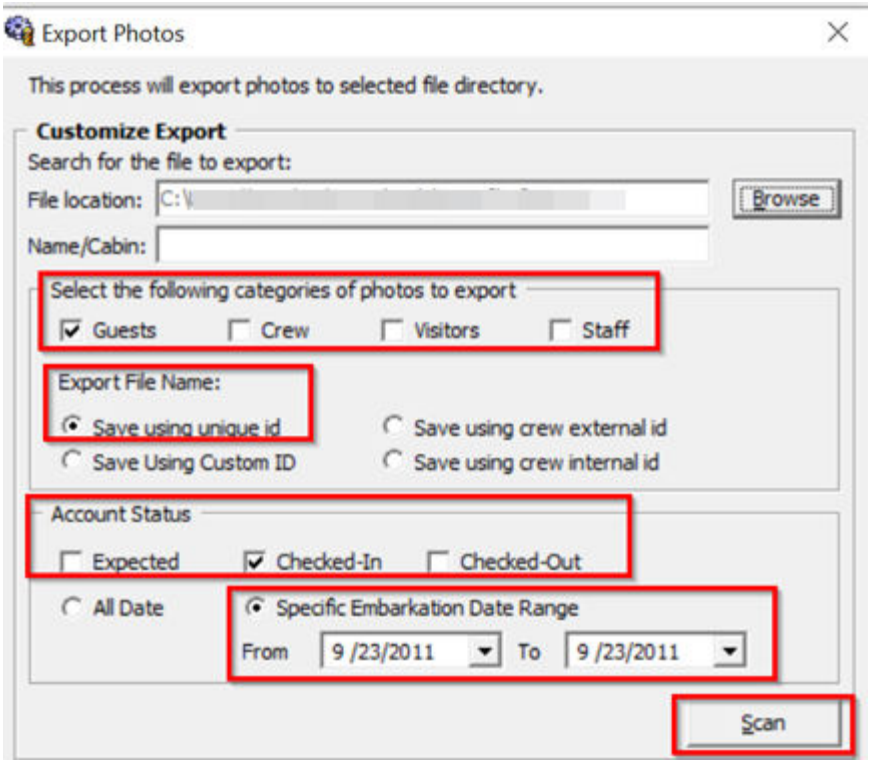
1. For **Individual Upload**, select the file path where the photo is stored.
2. Click the **Upload** button and you will see the photo on the bottom right corner.

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.

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Figure 9-77 Export Photos



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 checkboxes.
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.

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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 9-20 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*” in *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.

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10

Management Functions

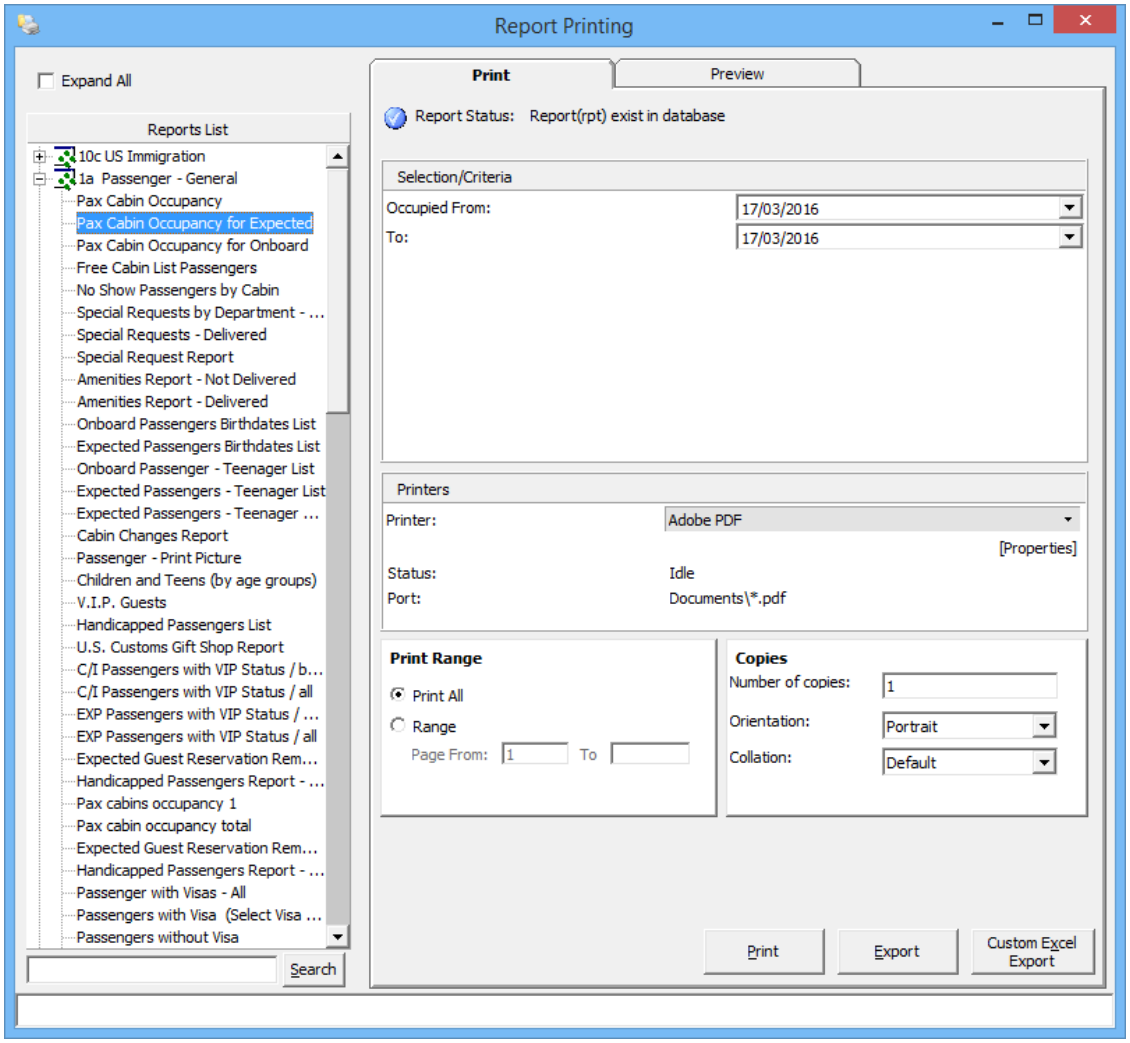
The Management module is one of the core modules of Oracle Hospitality Cruise. It maintains all passengers/crew's profile, reservations, billings and other requests during the voyage.

Front Desk Function

The Front Desk menu comprises functions such as Cabin Overview, Posting Overview, and Check-in/Check-out status, which provides a high level monitoring and overview of the operations.

Reports
The product is pre-installed with a set of operational reports. You can create and add customize reports through the **Administration module, System Setup, Reports Setup.**

Figure 10-1 Reports List



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Printing a Report

1. From the Front Desk file menu, select the **Reports** option.
2. Expand the report folder in the Reports List section by clicking the **(+) key**.
3. Select a **report** to print.
4. In the Print tab, select the **Selection/Criteria** and relevant fields.
5. Click **Print** or navigate to the Preview tab to preview before printing.
6. To export the report, repeat the above steps and click **Export.**

Batch Reporting

You can print a set of departmental reports by batch. These reports are predefined in **Administration module, System Setup, Reports Batch Printing Setup**.

To print the report by batch:

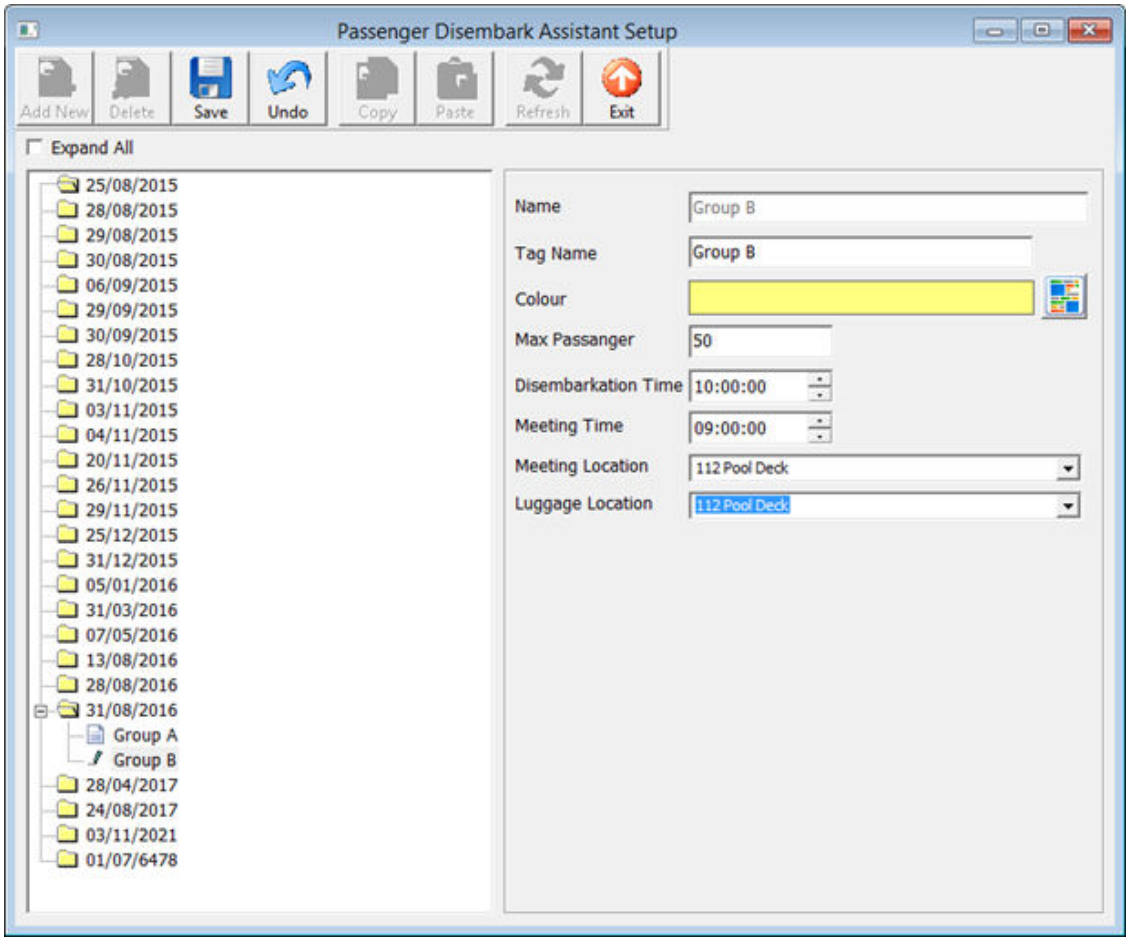
1. Select **Reports Batch Printing** from the Reports drop-down list.
2. In the Batch Reports Printing window, select the **batch number** to print.
3. In the Printer selection section, select the **Printer** and then click **Run**.

Passenger Disembark Assistant Setup

This function allows you to organize the meeting time, location, and luggage drop off point for debarking passengers by date.

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Figure 10-2 Passenger Disembark Assistant Setup



Adding a Debarkation Group

1. In the Passenger Disembark Assistant Setup form, click **Add New**.
2. Enter all the required fields and click **Save**.
3. Click **Exit** to close the form.

> **Note**
>
> You cannot delete a Debarkation Group if there is a passenger assigned. You must first unassigned all passengers from the group before proceeding.

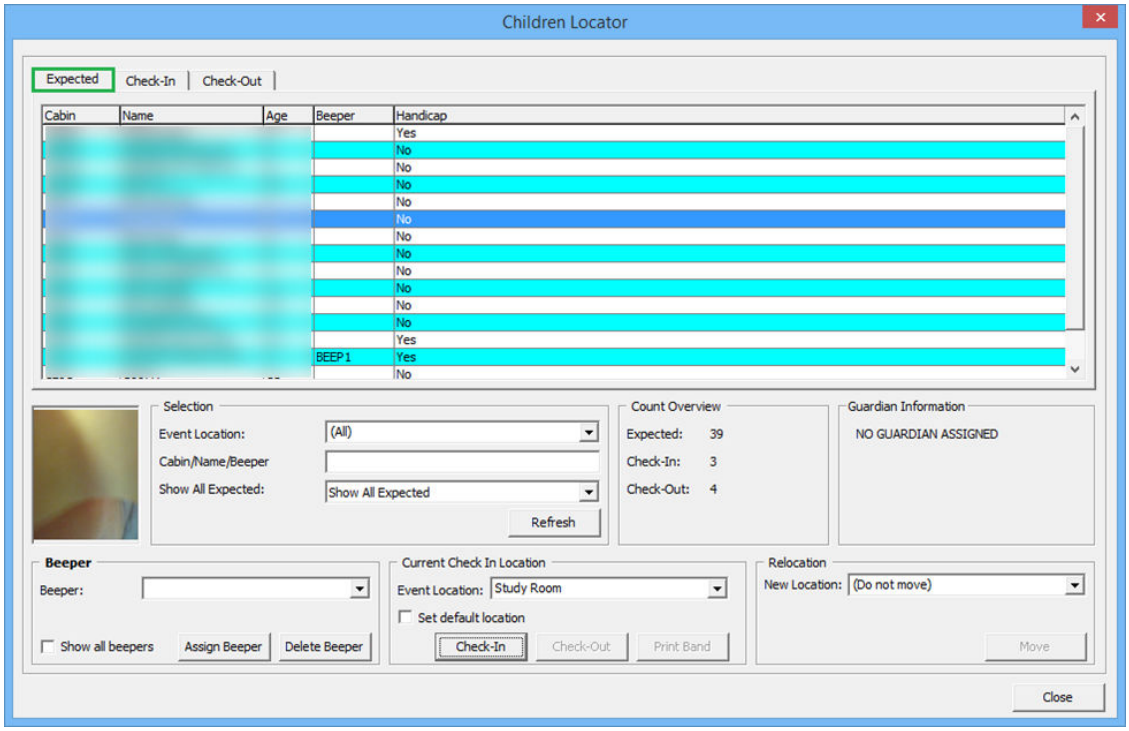
To remove a debarkation group, select the group from the list and click **Delete**.

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Child Locator

The Children locator function enables you to monitor the location where a child is checked in based on their reservation status — Expected, Check-In, or Check-Out, and the guardian assigned to take care of the child.

Figure 10-3 Children Locator

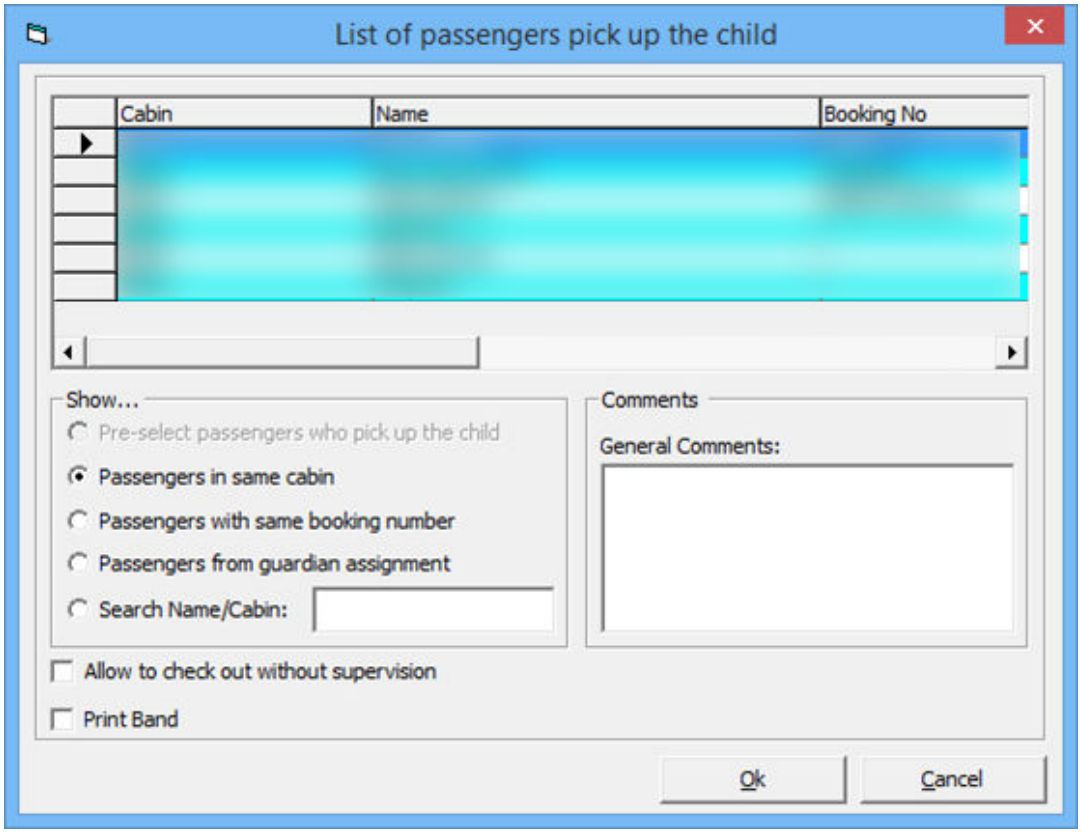


Checking In a Child

1. From the Front Desk menu, select the **Children Locator** option.
2. At the Children Locator window, click the **Check In** tab.
3. Select the **Event Location, Cabin/Name** and/or **Show All Expected,** and then click **Assign Beeper.**
4. If you are handing out a beeper, select a **beeper number** from the Beeper section and click **Assign Beeper.**
5. Navigate to the **Current Check-In Location** section, select the **Event Location** from the drop-down list, and click **Check-In.**

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Figure 10-4 Children Locator Pick Up



6. In the List of Passengers Pick Up window, select the **passenger** that picked up the child and then click **OK** to return to the Children Locator window. By default, passengers in same cabin is selected.
7. Information about the child is now shown in Check-In tab.

Checking Out a Child

1. From the Children Locator window, navigate to the Check-In tab.
2. At the Selection section, select one of the **options**, then click **Refresh.**
3. Select the **child name** from the grid and then click **Check-Out.**
4. At the Passenger to Pick Up Child window, verify the name and then click **OK** to confirm and update the child information into the Check-Out tab.

Changing the Pick-up Person

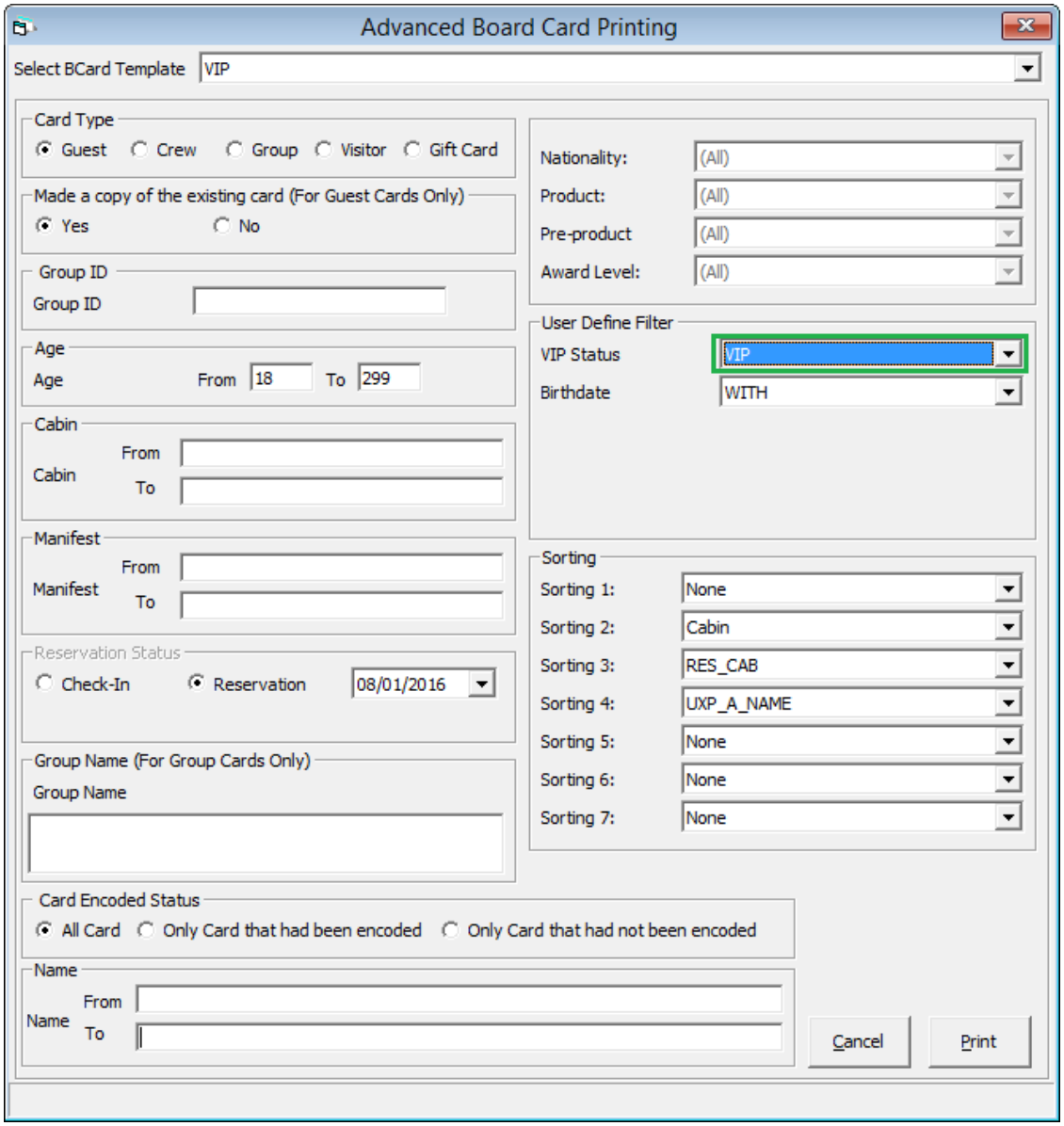
1. At the Check-In tab of the Children Locator window, right-click on the **child name** and select **Change Pick Up Person.**
2. In the Show section, select the one of the **options**, then select the **passenger name** from the grid and click **OK.** By default, the names shown are the passengers in the same cabin.

Advance Board Card Printing

The Advance Board Card Printing prints the board cards by batch based on the criteria template configured in the Administration module.

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Figure 10-5 Advance Board Card Printing Window



1. From the **Front Desk** menu, select **Advanced Board Card Printing.**
2. In the **BCard Template** field, select from the drop-down list to populate the predefined fields.

> **Note**
>
> You can change the selected fields(s) manually before printing.

3. Click **Print** to print the board cards.
4. In the dialog box indicating the number of records to print, select **Yes** to continue.
5. In the Batch Board Card Printing window, the printing progress of the board card is shown. If there is an error, it is reflected in the **Status** column.

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BoardCard Wizard

You can perform a quick board card printing by guest, crew, group, visitors, or gift card using the Board Card Wizard.

1. From the Front Desk menu, select the **BoardCard Wizard** option.
2. In the BCard Printing Wizard prompt, read and follow the instructions before clicking **Next.**
3. In the following wizard window,
   - Select the type of **board card** to print and click **Next.**
   - Select an option to encode using an existing card number or newly generated a card number, and then click **Next.**
   - Select an option to print cards for guest already on-board or future reservations. For future reservations, select the **Embarkation Date** from the drop-down list and click **Next.**
   - Click the **Filter Age** and enter the **Age From/To** field, if any.
   - Select one or more options using the drop-down list, such as **Nationality, Product, Pre-Product** and **Award Level,** if any.
   - Enter the **Names, Room numbers, or Manifest from/to,** if any, and then click **Next.**
4. The number of cards matching the selection appears. Enter a check mark if the cards should be sorted by Product when printing.
5. Check mark the preferred print sort order by room number, name, room number descending, or person name descending.
6. Click the **Finish** button to continue.
7. At the Batch Board Card Printing window, you will see the number of cards that are successfully printed or failed.
8. Click **Close** to exit and return to the main menu.

Check In/Out Status

The Check-in Status provides a real time status of expected check-ins for the day. It shows the number of reservations for the day, checked in, and remaining check ins at that time.

Similarly, the Check-out Status shows the total of reservations checking out, checked-out, and remaining.

Cruise Comment

The Cruise Comment field is made available to the Ship Operator to enter comments pertaining to the cruise. It accepts up to 4000 characters.

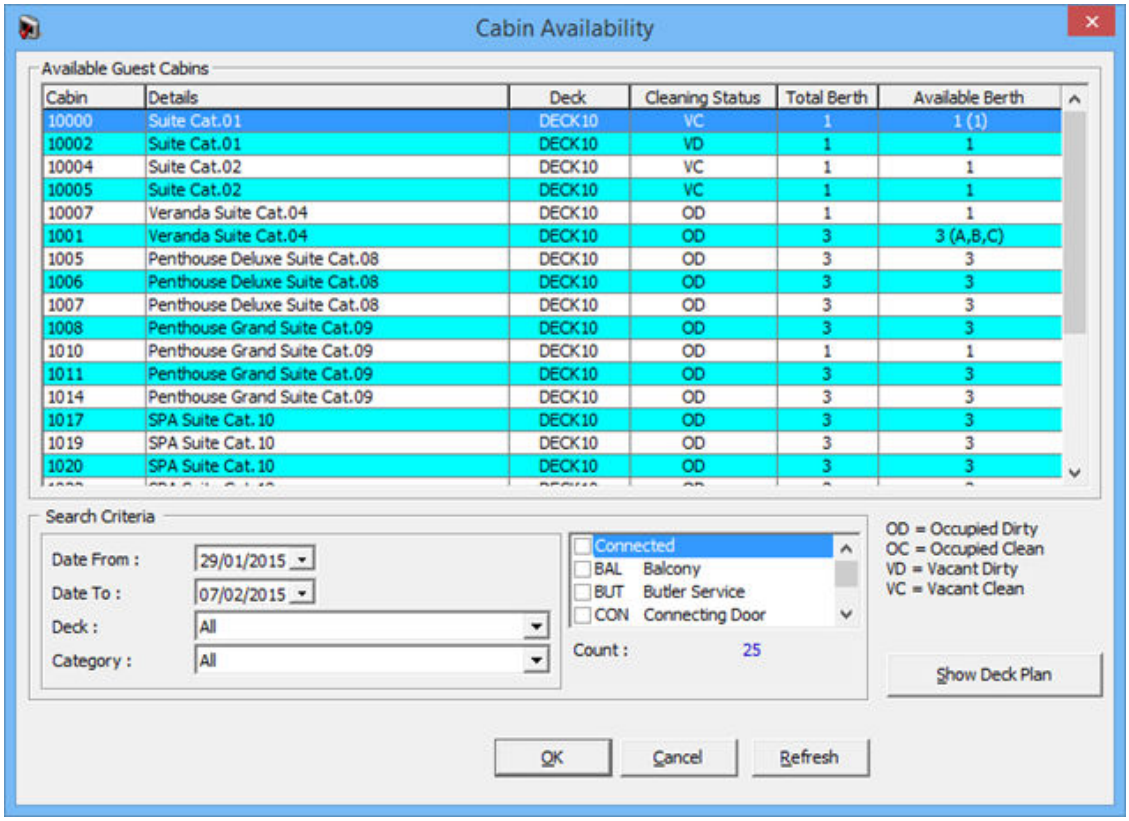
1. From the Front Desk menu, select the **Cruise Comment** option.
2. Select the Cruise from the drop-down list.
3. Enter the comment in the blank field and click **OK** to save.

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Cabin Availability

The Cabin Availability provides an overview of the available cabin by date, deck, category and features, and a view by deck plan. It also displays the current cabin cleaning status and the number of available berths.

Figure 10-6 Cabin Availability



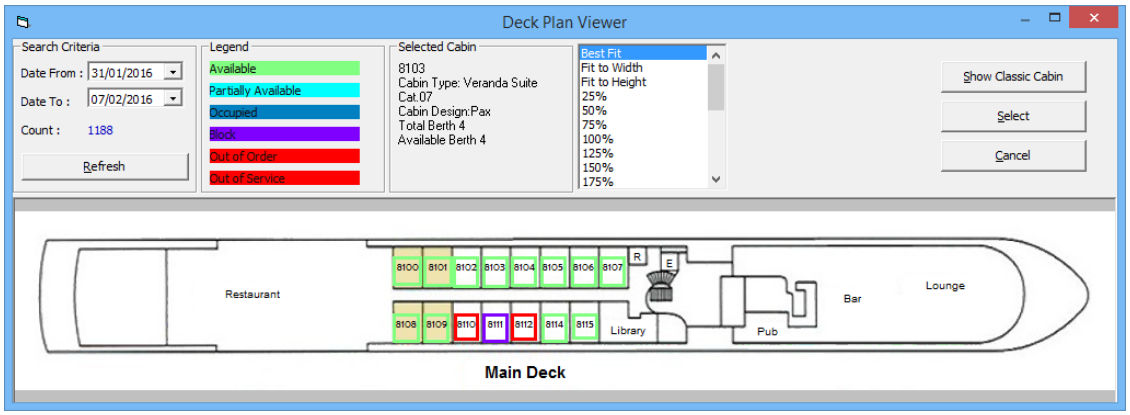
Searching for Available Cabin

1. From the Front Desk menu, select the **Cabin Availability** option.
2. In the Selection Criteria, select the **Date From/To, Deck**, and **Category** from the drop-down list.
3. Select the **Cabin Features** using the check-box, if any.
4. Click **Refresh** to refresh the view.

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Viewing Availability Using Deck Plan

Figure 10-7 Deck Plan Viewer

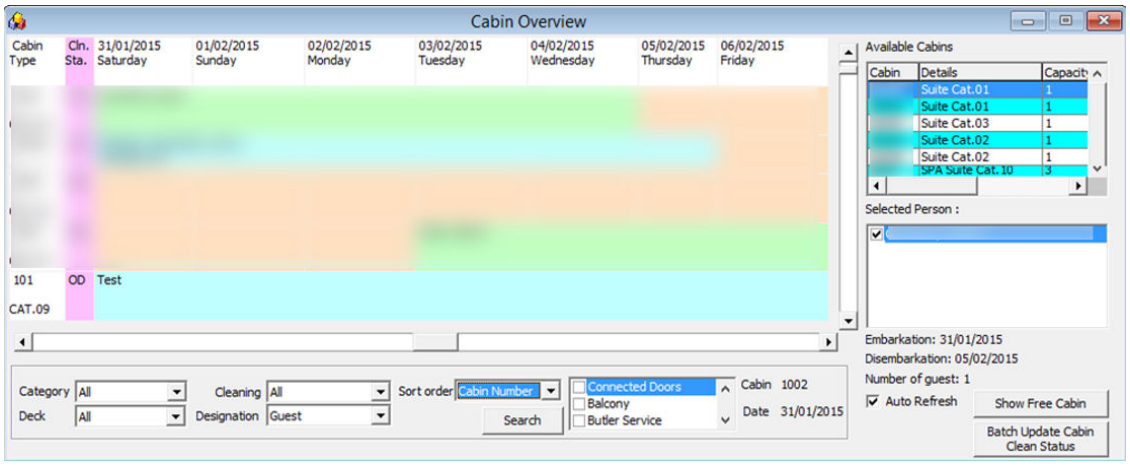


1. From the Cabin Availability window, click **Show Deck Plan.**
2. In the Selection Criteria, enter the **Date From/To**, and click **Refresh.**
3. In the diagram, the status of the cabin is reflected according to the color chart, and information of the selected cabin appears in the Selected Cabin section.

Cabin Overview

The Cabin Overview shows you a quick view of all cabin status by date, category, cabin clean status and occupant name. You can also update the cabin clean status by batch from here.

Figure 10-8 Cabin Overview



Navigating through Cabin Overview

- On the Overview window, the cabin number and category are shown with its cabin cleaning status next to it.

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- If the cabin is occupied or blocked for an expected guest, the name appears on the grid from the date booked until check-out.
- To search for a specific category or cabin cleaning state, use the filter fields.
- To show the Available Cabins of the window, select the guest name then click **Show Free Cabin**.

Batch Update of Cabin Clean Status

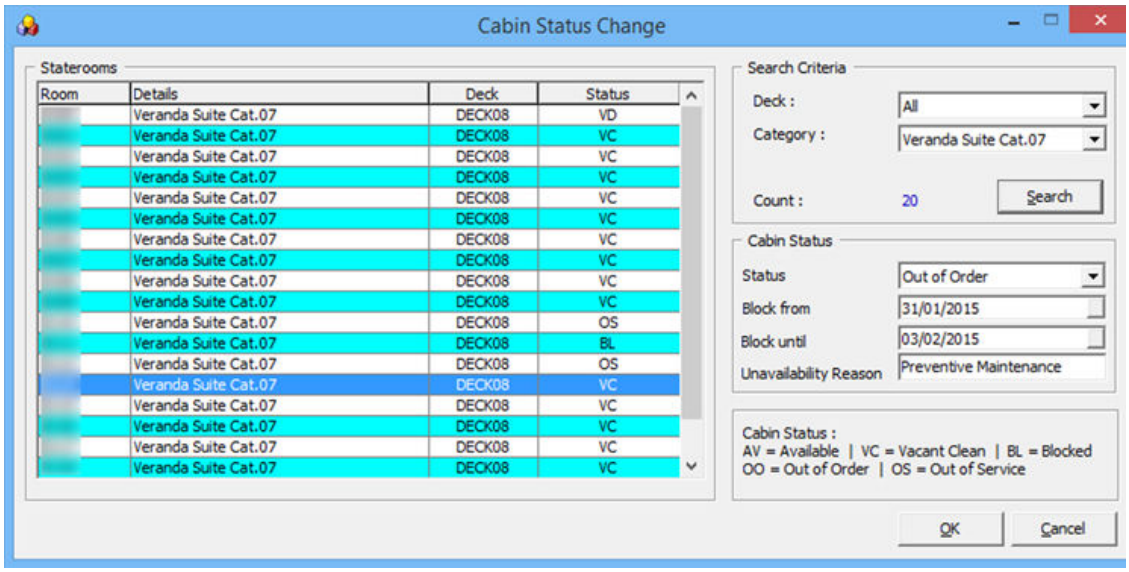
This function allows you to update the cabin status by batch, using the available filters.

1. At the Cabin Overview window, click **Batch Update Cabin Clean Status**.
2. In the Batch Update Cabin Clean Status window, select the **category**, or **deck**, followed by **cleaning status**, and then click **Search**.
3. Cabins matching the criteria are shown. Select the cabin number checkbox or use the **Select All** option.
4. Select **Clean Status** from the drop-down list and click **Update**.

Cabin Status

You can set the cabins in unavailable mode over a period of time for servicing or maintenance purposes by function.

Figure 10-9 Cabin Status Change



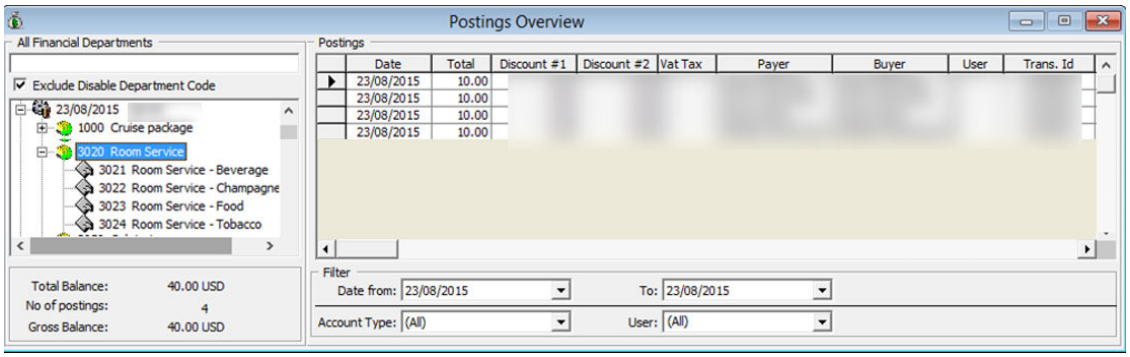
1. From the Front Desk menu, select the **Cabin Status** option.
2. In the Search Criteria, select the **Deck** and/or **Category**, then click **Search**.
3. The window displays cabins matching the search criteria. Select the **cabin**, then navigate to Cabin Status.
4. Select the **Status** from the drop-down list, insert the **Block From/Until** date and the **Unavailability Reason.**
5. Click **OK** to continue and update the status shown in the grid. Blocked cabins are highlighted in light orange in the Cabin Overview window.

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Postings Overview

This function displays a detailed posting by department code of the selected cruise and date. Information shown includes Date, Total Discounts, Vat Tax, Payer, Buyer, User, Transaction ID, Check No., and Posting Type (Manual or Automated).

Figure 10-10 Posting Overview Window

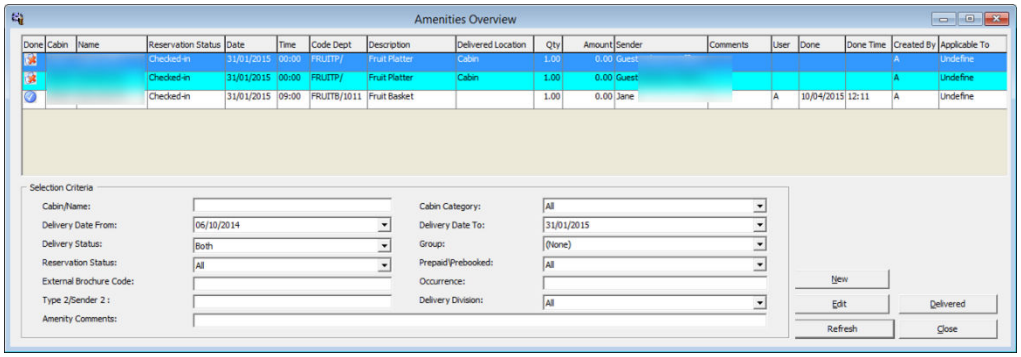


1. From the Front Desk menu, select the **Postings Overview** option.
2. Select the **Cruise Date**.
3. Select the **Department code** to view.
4. Postings of the selected department code are shown.
5. Double-clicking the transaction opens the posting details window and displays the bill image.

Amenities Overview

The Amenities Overview function provides you a single view of all the amenities requested, both pending delivery or delivered. You can always add new amenities or edit the existing ones.

Figure 10-11 Amenities Overview



Viewing Amenities Request

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1. From the Front Desk menu, select the **Amenities Overview** option.
2. In the **Selection Criteria**, select the available filters and click **Refresh**.
3. Information matching the selected criteria appears in the window.

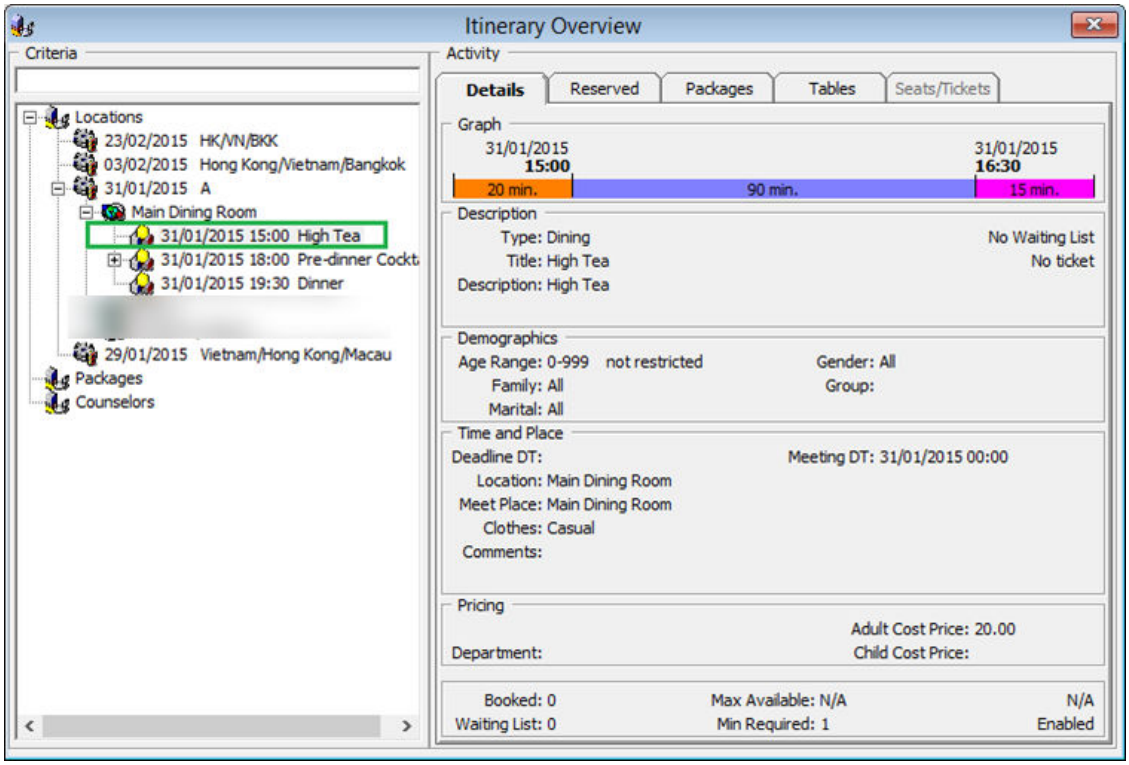
Adding/Editing/Delivering Amenities

See Cashier Function, Guest Handling, Service Info Tab for more information.

Itinerary Overview

The Itinerary Overview shows you the daily activities available to each cruise by Location, Package or Counselors. Such information is entered in the **System Cruise Setup, Itinerary Setup.**

Figure 10-12 Itinerary Overview



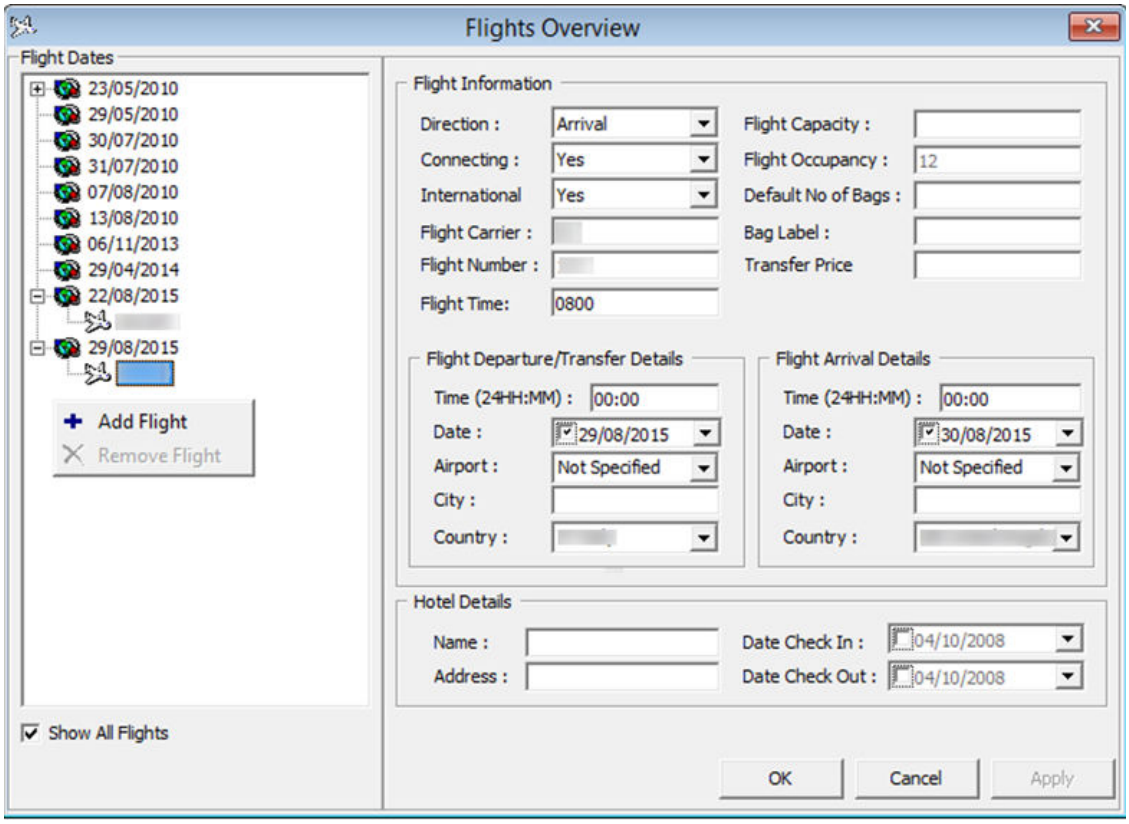
1. From the Front Desk menu, select the **Itinerary Overview** option.
2. Expand the **Locations or Packages** container, and double-click the **Cruise Date** to display available activities.
3. Expand the Activities to view the details.

Flights Overview

This function enables you to set up arrival or departure flights, which allows you to plan your resources and organize ground transfers for crew/passengers where necessary. To access the function, select **Flights Overview** from the Overview menu.

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Figure 10-13 Flight Overview Window



Viewing of Flight Details

1. From the Front Desk menu, select the **Flights Overview** option.
2. Expand the date of the Flights Overview window.
3. To view the Flight Information, select the **Flight Number** below the date.

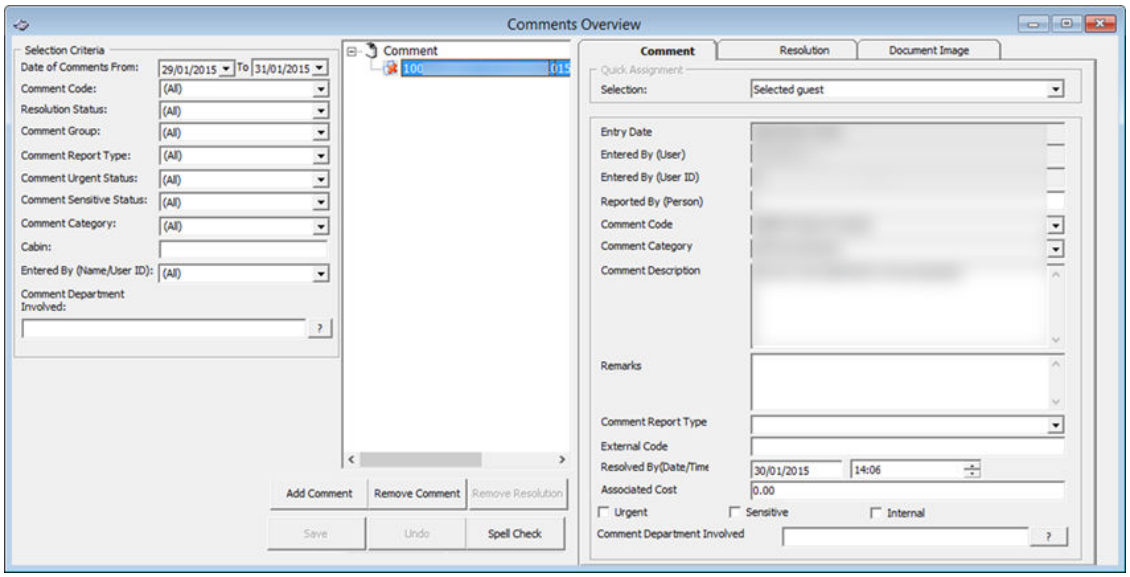
Adding/Removing Flight Information

1. In the Flight Overview window, select the date
2. Right-click and select **Add Flight.**
3. Enter the **Flight Information.**
4. Click **OK** to save.
5. To remove the Flight Information, select and right-click the **Flight Number,** and then select **Remove Flight.**

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Comments Overview

Figure 10-14 Comments Overview Window



1. From the Front Desk menu, select the **Comments Overview** option.
2. In the Selection Criteria, select the available filters, and then click **Refresh.**
3. Information matching the selection appears in the **Comment** section.
4. To view the comment, select the comment from the **Comment** section.

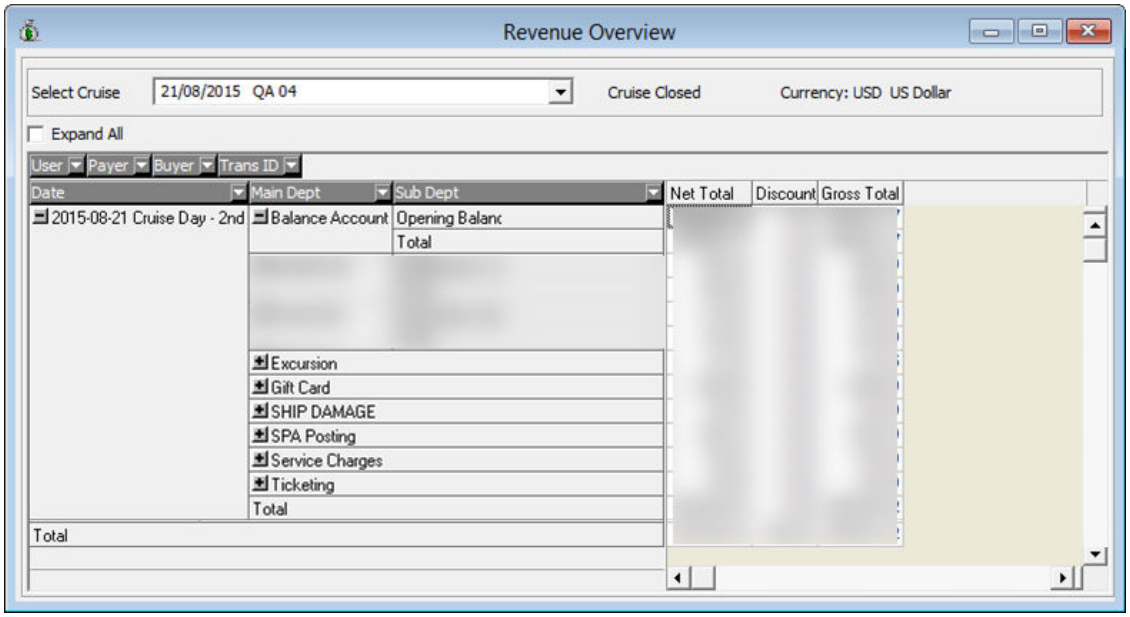
See Cashier Function, Guest Handling, Comments Tab for more information on how to add and remove comments.

Revenue Overview

The Revenue Overview function provides a comprehensive view of the daily revenue per cruise.

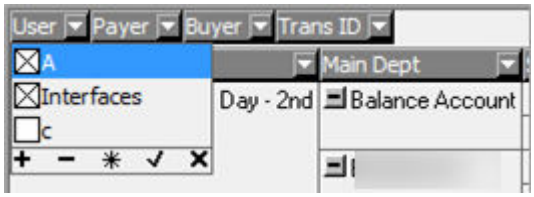
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Figure 10-15 Revenue Overview Window



1. From the Front Desk menu, select the **Revenue Overview** option.
2. Select the **Cruise** to view the revenue by the day.
3. Click the **'+/-'** symbols to expand or collapse the information.
4. To further drill down the information by User, Payer, Buyer or Transaction ID, select from the **drop-down list**.
5. Select the box next to the code and click the check mark to refresh the information.

Figure 10-16 Check Mark Boxes

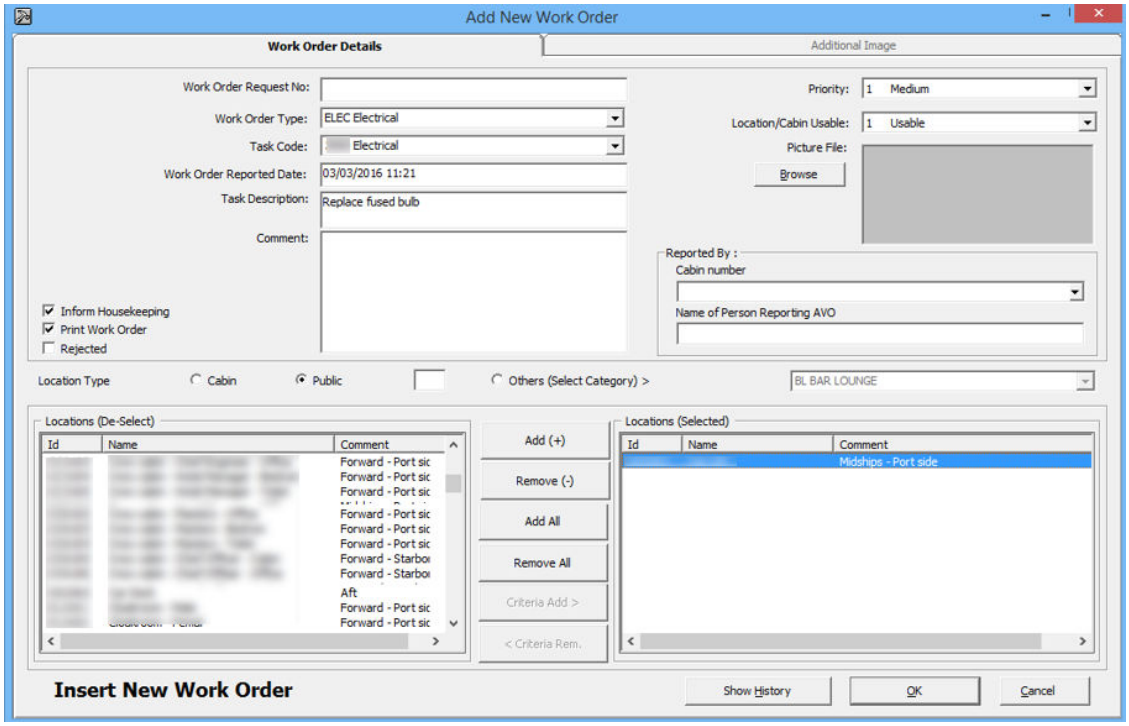


Add Work Order

With this function, you can add all maintenance work required on board the Ship whether it is a cabin or public location. You can add Work Orders one at a time or in batches using the Criteria Add function.

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Figure 10-17 Add New Work Order Form



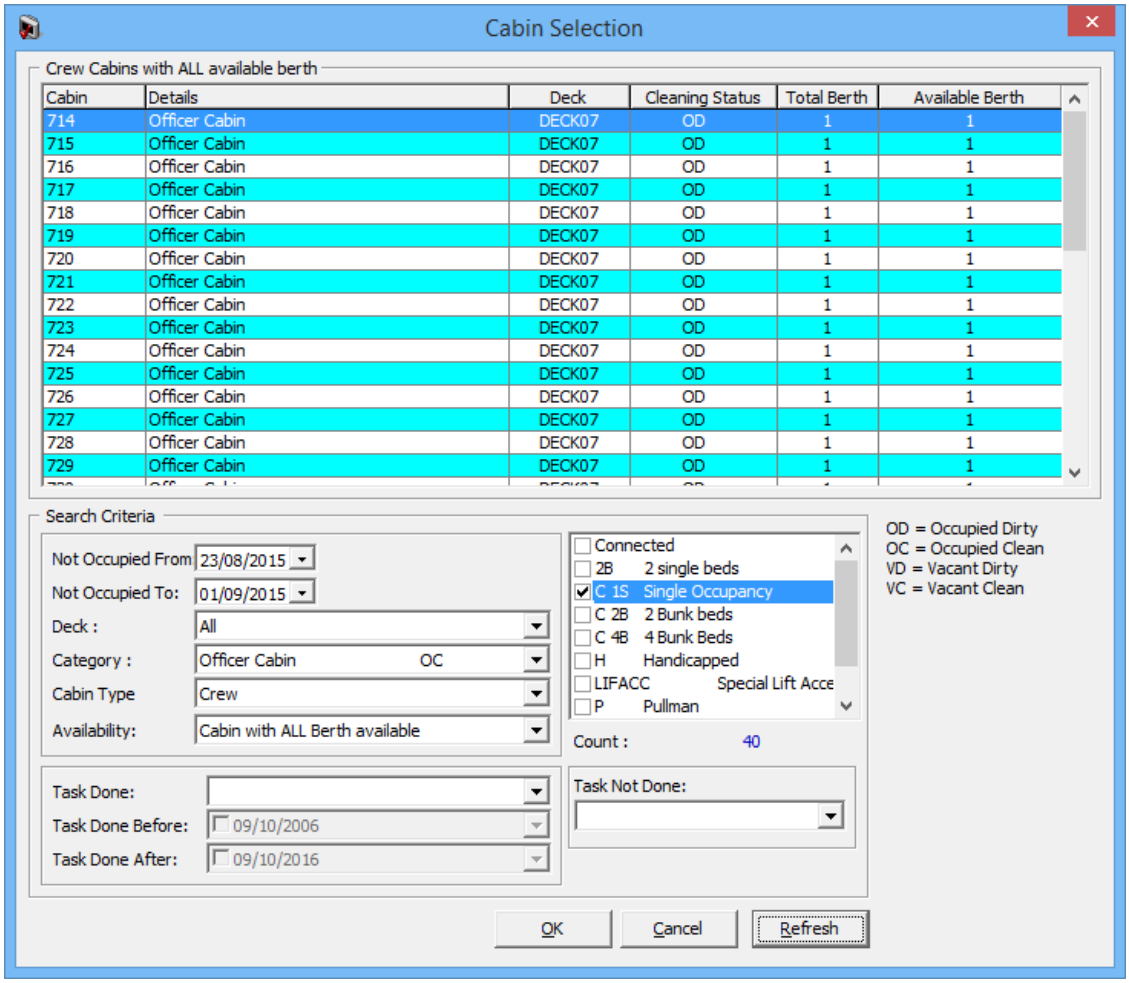
1. From the Front Desk menu, select **Add Work Orders**.
2. In the Add New Work Order form, Work Order Request No. field, enter the external **document number**, if any.
3. From the drop-down list, select the **Work Order Type, Task Code** and enter the **Task Description** and **Comment.**
4. Select the **Priority** and **Location/Cabin Usable Status** from the drop-down list and attach a picture file, if any. You can override the predefined Priority and Location Usable Status when adding or editing a work order.
5. In the Reported By Section, select the **Cabin number** and enter the **Name of Person Reporting AVO**.
6. Select the **Location Type** either **Cabin, Public**, or **Others (Select Category)>**, then navigate to Location section and select the exact location from the grid.
7. Click **Add** to add the location to the Location (Selected) section.
8. To de-select the location from the Locations (Selected), highlight the item to remove and then click **Remove(-)** or **Remove All.**
9. Click **OK** to save the work order.

Adding Work Orders by Batch

1. Repeat steps 1 to 6 of Adding Single Work Order.
2. Click **Criteria Add>** to launch the Cabin Selection window.
3. In the Cabin Selection window Search Criteria section, select the criteria from the drop-down list, select the required filters, and then click **Refresh** to update the information in the grid.

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Figure 10-18 Cabin Selection Criteria



Cashier Function

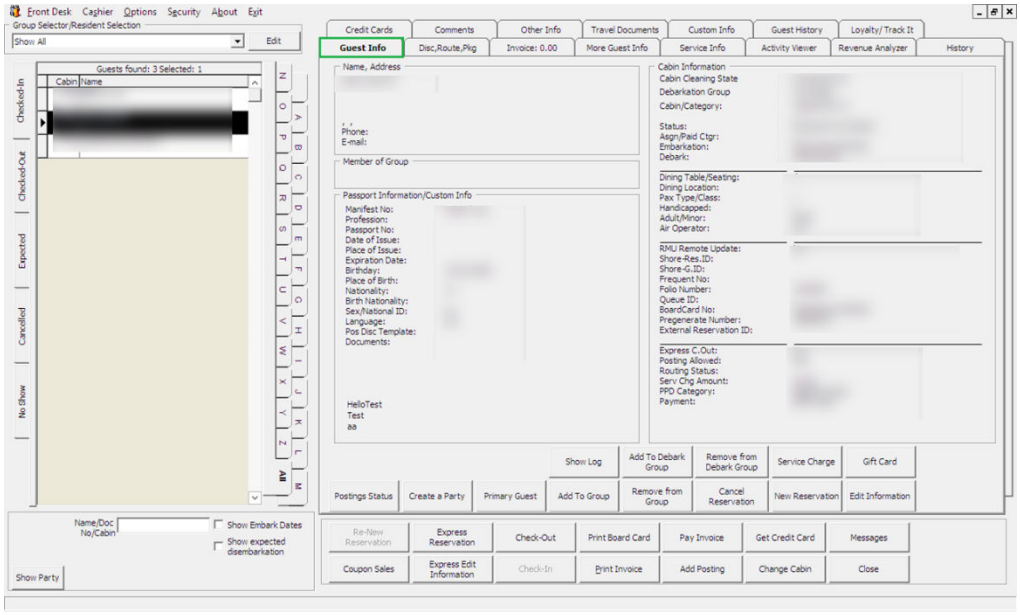
The Cashier menu is a widely used function in a Ship Operation where the passenger profile, reservations, billing, and stay histories are recorded and stored.

Guest Handling

This section describes the available functions to access guest data such as guest information, travel documents, invoice, guest history, group account, and others. It also allows you to create, amend, and cancel a reservation, and post a charge and check out a guest/account. These functions are perform in the **Management, Cashier** drop-down menu

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Figure 10-19 Guest Handling



Search Panel

The Search panel function enables you to look up a reservation by status — Check In, Check Out, Expected, Canceled and No Show from the Guest Handling window.

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Figure 10-20 Search Panel

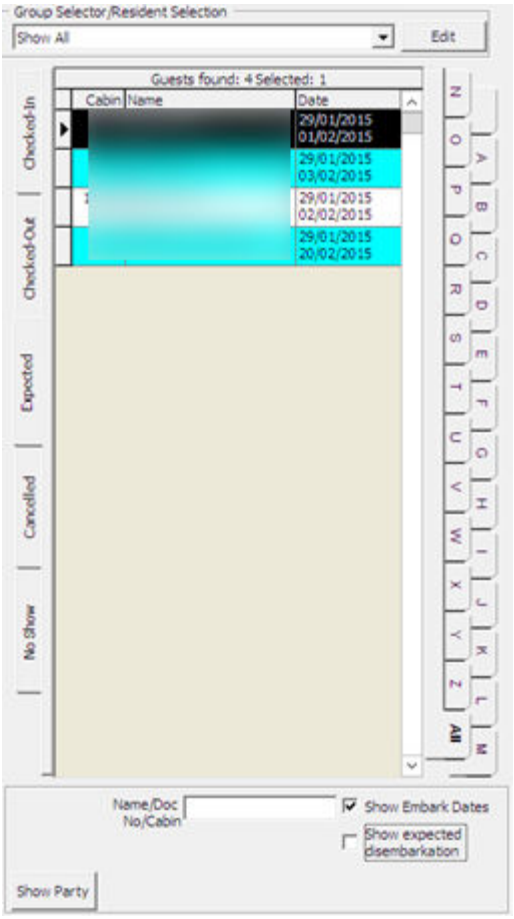


Table 10-1 Search Panel

Tab	Description
Checked-In	This tab lists all registered passengers.
Checked-Out	This tab lists all checked-out passengers of past and current cruise.
Expected	This tab lists all passengers due to arrive for current or future cruises.
Cancelled	This tab lists all canceled reservations.
No Show	This tab lists all reservations that fail to show up or are yet to register during System Date Change.
Show Embark Dates	Check box includes guest embarkation/ debarkation dates in the result list.
Show Expected disembarkation	Check box displays disembarking guest of selected date and cabin.

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Searching For Guest

1. To locate a guest's reservations, in the Search panel, select the **Status tab** and then select the first letter in the guest's last name. If you select ALL, all reservations appear in alphabetical order.
2. You can narrow down your search using the guest name, document number, or cabin number and date.

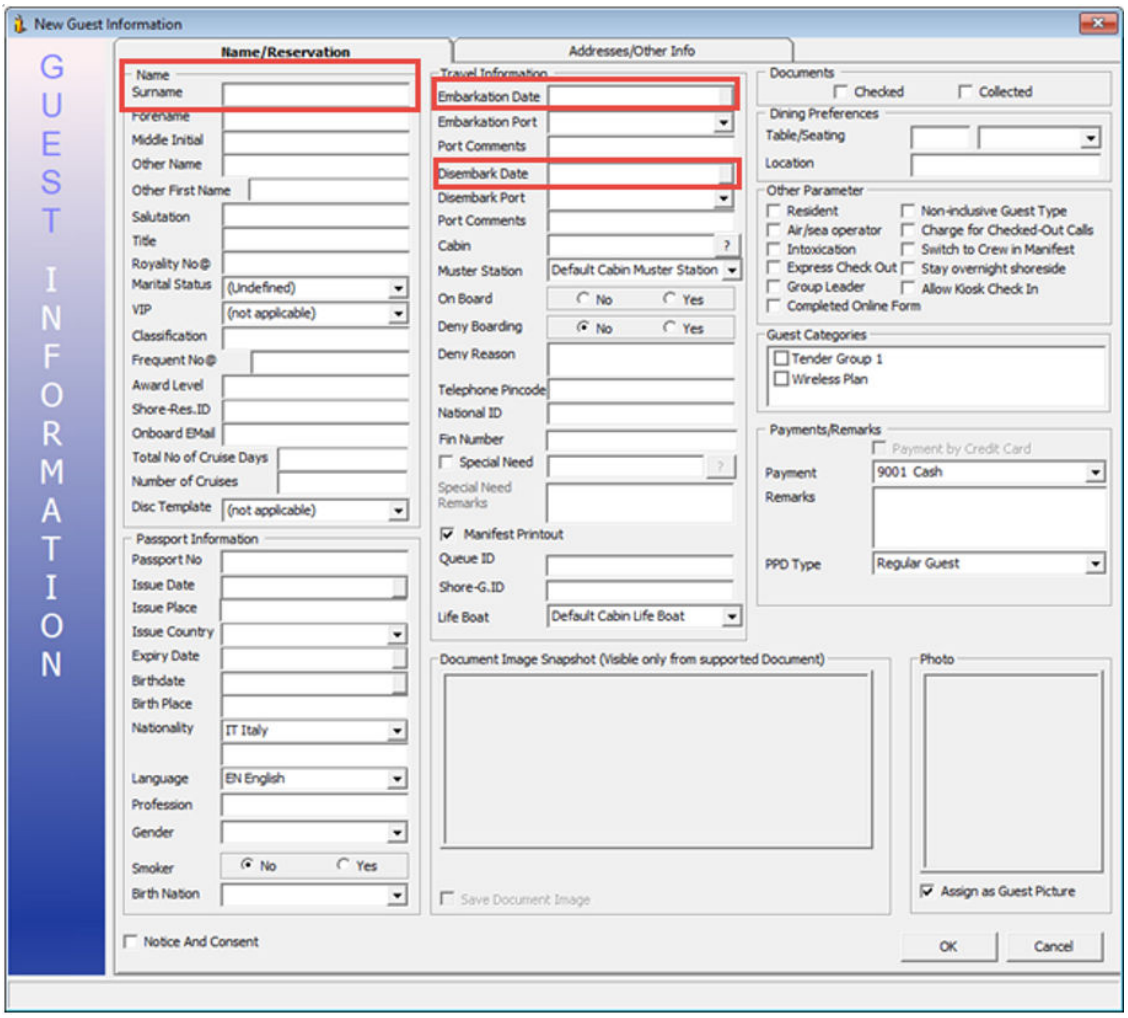
Guest Info Tab

The Guest Info tab is the default tab for the Guest Handling function. It provides a single view of guest information such as name, address, passport details, cabin information, and others. It also enables you to drill down further into the reservation for more information.

New Reservation Function

The New Reservation function allows you to create a booking for guests arriving without a reservation. A reservation form is launched when you click the **New Reservation** button. Below are the field definitions of the form.

Figure 10-21 New Guest Information Window



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Table 10-2 Field Definition of Guest Information Tab (Name)

Field	Description
Name	
Surname	Last name of the guest.
Forename	First name of the guest.
Middle Initial	Middle name of the guest.
Other Name	Other Last Name.
Other First Name	Other First Name.
Salutation	The salutation of the guest.
Title	Title of the guest.
Royalty No	Additional Title. A user definable label.
Marital Status	Marital Status of guest. Configurable system codes in **Administration, System Codes, Marital Codes.**
VIP	VIP classification of the guest. Configurable system codes in **Administration, System Codes, Marital Codes**.
Classification	Classification/VIP flag.
Frequent No	Frequent Cruiser number. A user definable label.
Award Level	Frequent Cruiser Award Level.
Shore-Res.ID	External System Reservation ID. A user definable label.
Onboard Email	Email contact while on board.
Total No. of Cruise Days	Total Cruise days signed up. Information from data import.
Number of Cruises	Number of cruises purchased. Information from data import.
Disc Templates	Discount templates applied to the account.

Table 10-3 Field Definition of Guest Information Tab (Passport Information)

Field	Description
Passport Information	
Passport No	Passport number of the guest.
Issue Date	Date travel document was issued.
Issue Place	Place travel document was issued.
Issue Country	Country travel document was issued.
Expiry Date	Expiry date of travel document.
Birthdate	Birth date of the guest.
Birth Place	Birth place of the guest.
Nationality	Nationality according to travel document.
Language	Language spoken by guest.
Profession	Profession of the guest.

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Table 10-3 (Cont.) Field Definition of Guest Information Tab (Passport Information)

Field	Description
Gender	Gender identifier.
Smoker	Smoker identifier.
Birth Nation	The original nationality of the guest if differ from Nationality field.

Table 10-4 Field Definition of Guest Information Tab (Travel Information)

Field	Description
Travel Information	
Port Comments	Additional comments of the port.
Debark Date	Debarkation date.
Debark Port	Port of debarkation.
Cabin	Cabin number assigned.
Muster Station	Muster Station assigned. Linked to Cabin number.
On Board	On/Off board identifier.
Deny Boarding	Deny boarding identifier.
Deny Reason	Reason boarding denied.
Telephone Pincode	PIN code setup for outgoing calls and access to Kiosk.
National ID	Local identification document, for example, ID or Driving License
Handicapped	Disability status of the guest. A user definable label.
Handicapped Remarks	Disability remarks.
Manifest Printout	Default inclusion of guest in manifest print out.
Queue ID	Assigned queue ID during embarkation.
Shore.G-ID	Unique Identifier for FMS. A user definable label.
Life Boat	Life Boat assigned. Linked to Cabin number.

Table 10-5 Field Definition of Guest Information Tab (Documents)

Field	Description
Documents	
Documents	Confirmation checkbox of whether travel document is checked or collected.

Table 10-6 Field Definition of Guest Information Tab (Documents)

Field	Description
Dining Preferences	

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Table 10-6 (Cont.) Field Definition of Guest Information Tab (Documents)

Field	Description
Table/Seating	Assigned table number and seating preferences for dining.
Location	Assigned dining location.

Table 10-7 Field Definition of Guest Information Tab (Other Parameter)

Field	Description
Resident	Indicator whether the guest is a resident.
Air/Sea operator	Indicator whether the guest is an Air/Sea operator.
Intoxication	Intoxication identifier.
Express Check Out	Indicates guest require Express Check Out.
Group Leader	Group Leader identifier.
Non-inclusive Guest Type	Indicates that guest is not part of a package or all inclusion plan.
Charge for Checked-out Calls	Define whether checked-out calls will be charged.
Switch to Crew in Manifest	Indicates that reservation has been moved Crew manifest.
Stay overnight shoreside	Indicates that guest stays overnight at shore side.

Table 10-8 Field Definition of Guest Information Tab (Guest Categories)

Field	Description
Guest Categories	
Selection box	User configurable system codes in **Administration, System Codes, Guest Categories**.

Table 10-9 Field Definition of Guest Information Tab (Agent Information)

Field	Description
Payments/Remarks	
Payment	Payment Department code for this reservation.
Remarks	Additional remarks pertaining this payment.
PPD Type	Revenue per person per day tag.

Table 10-10 Field Definition of Guest Information Tab (Others)

Field	Description
Others	

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Table 10-10 (Cont.) Field Definition of Guest Information Tab (Others)

Field	Description
Document Image Snapshot	Displays snapshot of scanned passport.
Photo	Displays saved photo of the guest.
Notice and Consent	Mandatory field. Indicates passenger accept and agrees to the Notice and Consent Terms.

Figure 10-22 Guest Information Address / Other Information

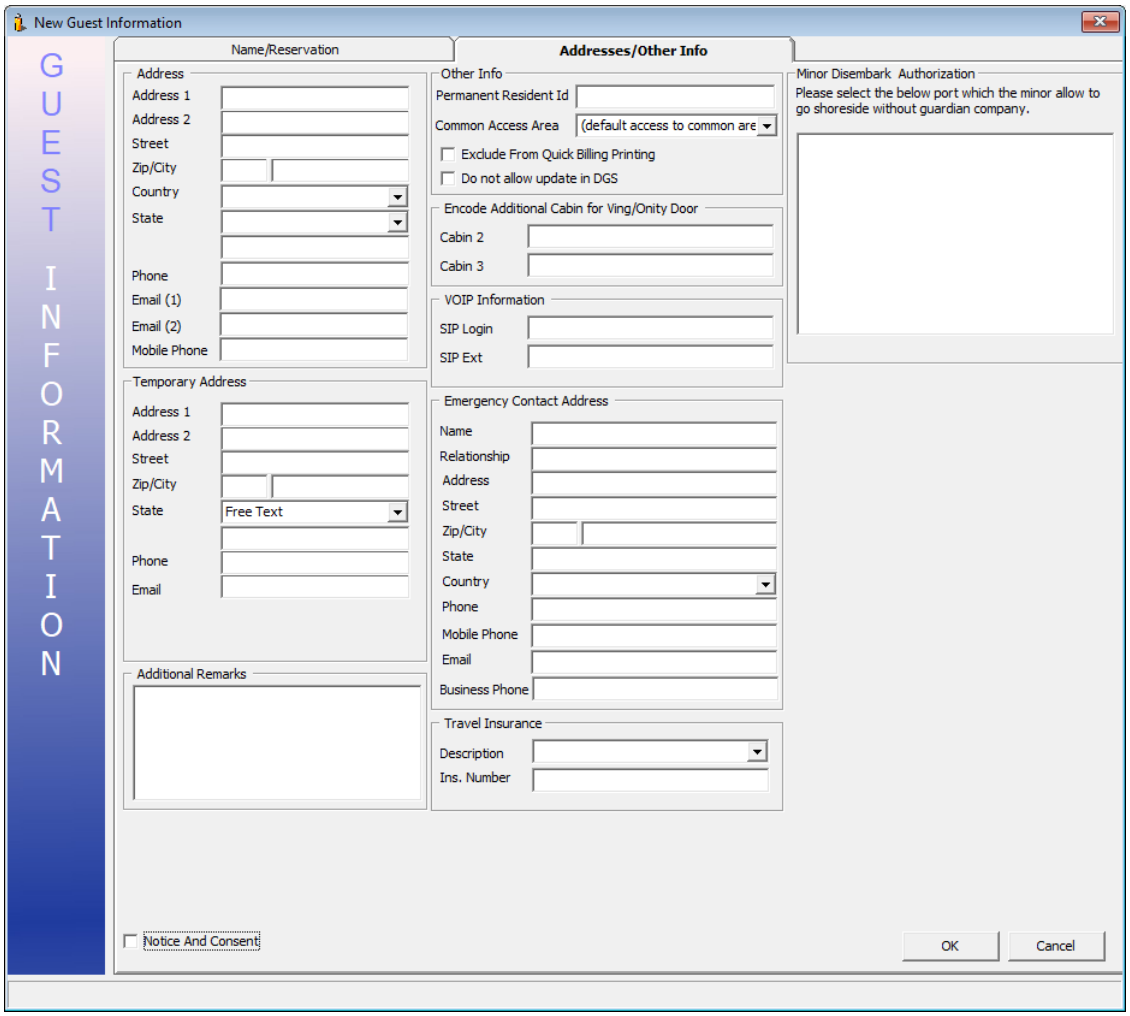


Table 10-11 Field Definition of Guest Information Address Tab

Field	Description
Address / Temporarily Address	
Address 1	Address 1.
Address 2	Address 2.

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Table 10-11 (Cont.) Field Definition of Guest Information Address Tab

Field	Description
Street	Street name.
Zip/City	Zip Code / Name of city.
Country	Country.
State	State.
Phone	Phone number of guest.
Email 1	Email address of the guest.
Email 2	2nd Email address of the guest.

Table 10-12 Field Definition of Guest Information Address Tab (Other Info)

Field	Description
Other Info	
Permanent Resident ID	Permanent Resident ID of the guest.
Common Access Area	Allowed common access area.
Exclude from Quick Billing Printing	Indicator whether to exclude from Quick Billing printing.

Table 10-13 Field Definition of Guest Information Address Tab (Encode Additional Cabin for Ving/Onity Door)

Field	Description
Encode Additional Cabin for Ving/Onity Door	
Cabin 2/3	Cabin number of joint cabin.

Table 10-14 Field Definition of Guest Information Address Tab (Emergency Contact Address)

Field	Description
Emergency Contact Address	
Name	Name of Emergency contact person.
Relationship	Relationship of Emergency contact person.
Address	Address.
Street	Street.
Zip/City	Zip code/city.
State	State.
Country	Country of Residency.
Phone	Phone number of contact person.
Mobile Phone	Mobile number of contact person.
Email	Email address of the contact person.
Business Phone	Business phone number of contact person.

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Table 10-15 Field Definition of Guest Information Address Tab (Travel Insurance)

Field	Description
Travel Insurance	
Description	User configurable system codes in **Administration, System Codes, Travel Insurance**.
Ins. Number	Insurance Policy Number.

Table 10-16 Field Definition of Guest Information Address Tab (Minor Debark Authorization)

Field	Description
Minor Debark Authorization	
Port Date / Name	Selectable port allowed for minor for debark.
Notice and Consent	Mandatory field. Indicates passenger accept and agrees to the Notice and Consent Terms.

Creating a New Reservation

1. Click the **New Reservation** button in the Guest Handling window to open a New Guest Information form.
2. Enter all the relevant information particularly the mandatory fields such as Notice and Consent. If this checkbox is deselected, the system does not allow you to proceed and prompts a warning message. Refer to your company standard operating procedure for the other mandatory fields.
3. Click **OK** to save the form.
4. The saved information is visible under the **Guest Info tab** and is categorized as **Expected Arrival**.

Editing a Reservation

1. Search the reservation from the Search panel and then click the **Edit Information** under the **Guest Info tab** to open the existing Reservation Form.
2. Edit all relevant information and click **OK** to save the changes.

Canceling Reservation

1. Search the reservation from the Search panel and then click **Cancel Reservation** under the Guest Info tab.
2. Select **Yes** to cancel the reservation when prompted. This places the booking under the Cancelled tab.

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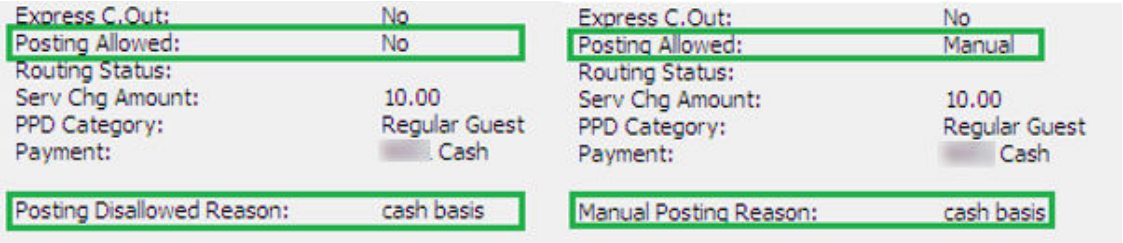
Posting Status

The Posting Status is a function that assists you in managing cash-paying guests or guests who may have exceeded their credit limit. This function enables/disables the posting from flowing through to the account.

Disabling a Posting

1. Retrieve the reservation from the Search panel and then click **Posting Status** in the Guest Info tab.
2. Enter the reason to disable the posting when prompted, either by selecting a predefined reason from the drop-down list or by manually inserting them.
3. If you select **Allow manual postings**, this only *disables* postings from the interfaces. You can still perform manual posting within the Guest Handling function.
4. Click **OK** to set the posting status for the account to **No** or **Manual**.

Figure 10-23 Posting Status (No or Manual)



Enabling Posting

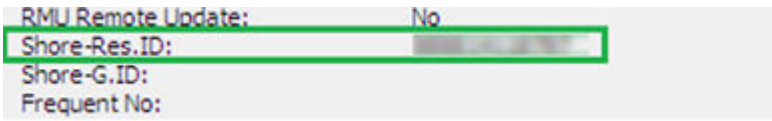
1. Retrieve the reservation from the Search panel and then click **Posting Status** in Guest Info tab.
2. The system prompts for a response to accept the postings. Selecting **Yes** resets the Posting status to allowed, whereas **No** retains the Posting status unchanged.

Creating a Party

This function manages and identifies a small number of persons travelling together who do not necessarily share the same cabin. In addition to identification purposes, the person responsible for payment of accounts or main contact liaison can be made as the “primary” passenger.

1. Search the reservations in Search panel.
2. Use the **CTRL+** key to select the names that make up a party.
3. Click **Create Party** under the Guest Info tab.
4. The system updates the guest of the same party with Shore-Res ID.

Figure 10-24 Party Identifier



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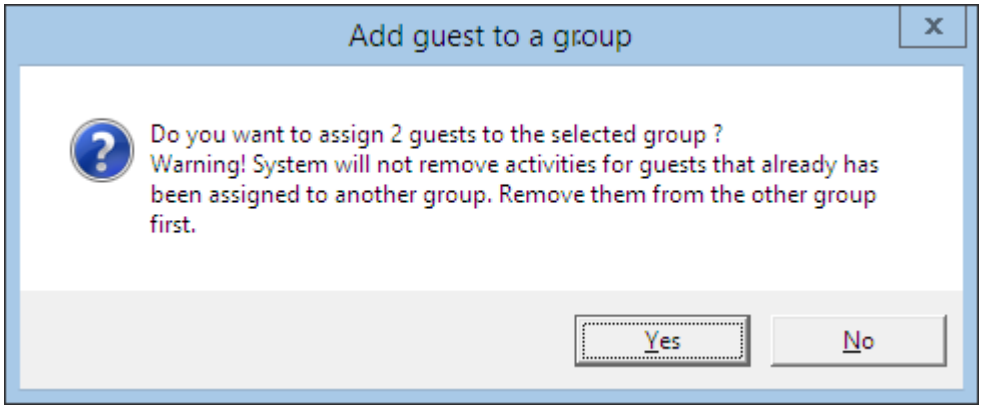
Showing a Party

To view a list of travel companions within a party, click the **Show Party** button.

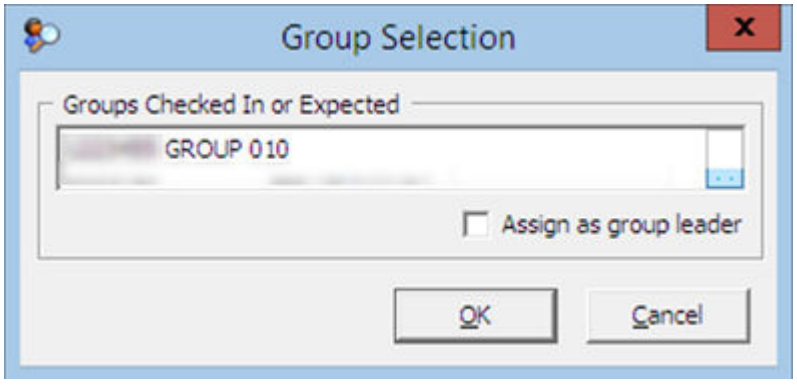
Adding to Group

A guest can be an individual traveler or a person travelling in a group. If the guest has a reservation and is to become part of a group, you can link the reservation to the group account and display all travel companions within the group when searched.

1. Search the guest name from the Search panel.
2. Mark the reservation(s) and then click **Add to Group** in the Guest Info tab.
3. The system prompts for a response whether to assign selected guest(s) to the group. Click **Yes** to proceed.

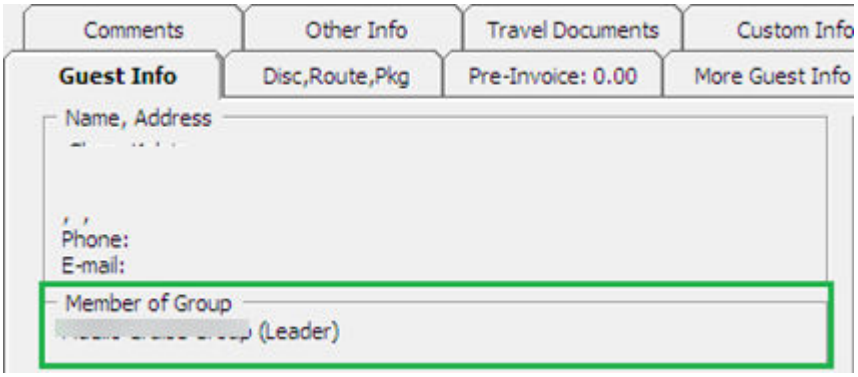


4. In the Group Selection window, select the group from the list.

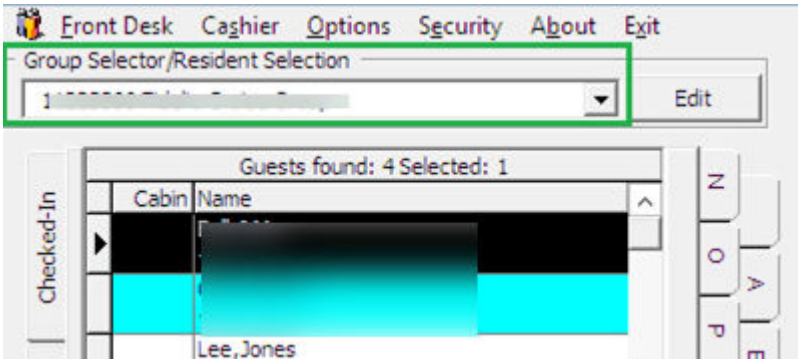


5. If **Assign as group leader** is selected, it identifies the guest as a leader. You can assign more than one leader in a group.
6. Once added, the group name is visible under **Member of Group** in the Guest Info tab. If the guest is a Group leader, the word (Leader) appears after the group name.

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7. Guests affiliated with the group are listed when you search by group name from the Search panel.



Removing from Group

This function removes guests from an existing group and converts their reservation to an individual reservation.

Removing a guest from group

1. Search the guest name using the Search panel.
2. Mark the reservation(s) and then click **Remove from Group**.
3. The system prompts for a response to remove selected guest(s) from the group. Click **Yes** to proceed and the group name is removed from the Guest Info, Member of Group field.

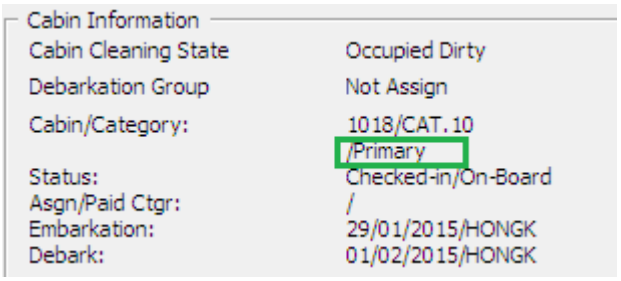
Primary Guest

As mentioned in the **Creating a Party** topic, you can designate a guest within a party as a primary guest or the person in the party who is in charge and responsible for the accounts. Below are the steps to assign a Primary guest. Note that this process supersedes earlier assigned Primary guests, if any.

Assigning a Primary Guest

1. Identify the party by clicking the **Show Party** button.
2. Highlight the name of the person to be designated as Primary.
3. Click **Primary Guest** to assign the selected person and the word **Primary** will appear under the **Cabin Information** section.

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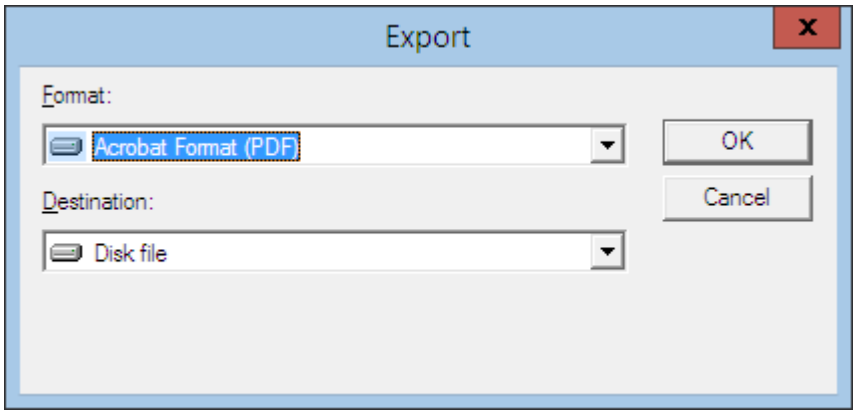
Show Log

A chronological record of activities such as passenger's movements, financial transactions, and systems events are logged to enable the reconstruction and examination of the sequence of events and/or changes made. Such information is viewable in the Show Log function.

Showing Log

1. Retrieve the reservation from the Search panel, then click **Show Log** in the Guest Info tab.
2. The log displays a list of events sorted by date/time order. Click **Print** to send a copy of the log to the printer.
3. Click the **Export** button to export the log into a supported file format. Select the format from the drop-down list.

Figure 10-25 File Export Prompt



Guardian Assignment

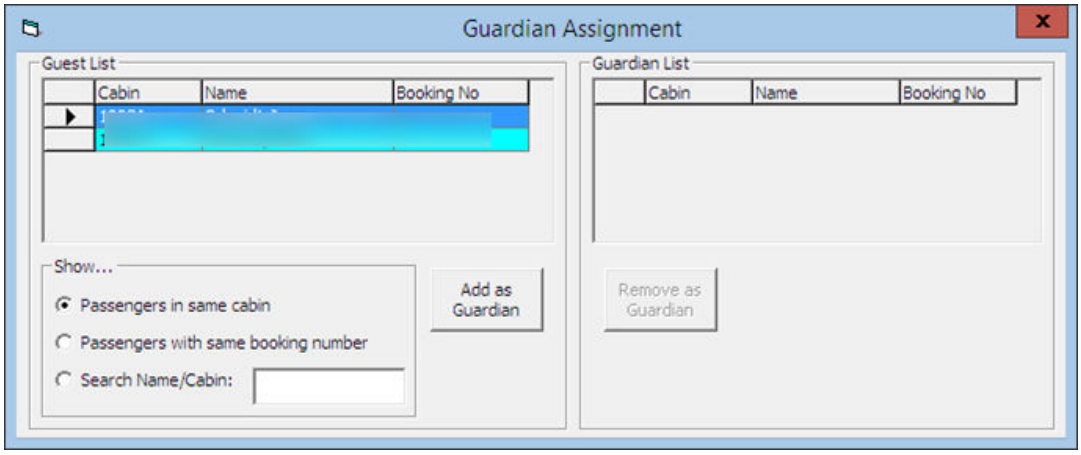
Depending on the Ship's policy and age set forth as a Minor, a guardian might be required to accompany a minor on certain activities or in the absence of the parents. This function is available to account for passengers whose age is below the *Minimum Adult Age* a set in the **General, Guardian Auto Assignment** parameter.

Assigning a Guardian

1. Navigate to the **Guest Handling** window and search for the minor's name/cabin.
2. Click the **Guardian Assignment**.

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3. In the Guardian Assignment window, select from the following options:
   - Passengers in the same cabin.
   - Passengers with same booking number.
   - Search Name/Cabin number.



4. Selecting one of the above options illuminates the **Add as Guardian** button.
5. Select the guardian name from the guest list, then click**Add as Guardian** to save the name to the Guardian List.
6. The assigned guardian name will appear in the **Guest Info, Name/Address** section.

Removing Guardian Assignment

You can remove the guardian from the minor account by clicking **Guardian Assignment**, selecting the guardian name, and then clicking **Remove as Guardian**.

Mark No Show

The Mark No Show function changes the guest status from *Expected* to *No Show* prior to the End of Day (EOD) process and is available only to users who have the appropriate access rights.

1. Search for the **guest name** from the Search panel, Expected tab.
2. Click the **Mark No Show** button at the Guest Handling window.
3. At the mark Guest to No Show prompt, click **Yes** to change the reservation status. The booking will now appear in the No Show tab.

Service Charge

The Ship operators might have a standard Service Charge value defined as an automatic charge to the guest account. This posting is typically performed using the Quick Service Charge Posting function. The value of the service charge is set in the Service Charge, Default Charge Amount, and Minimum Passenger Age parameter. The Service Charge function in Guest handling enables you to post the service charge manually or disable the automatic posting.

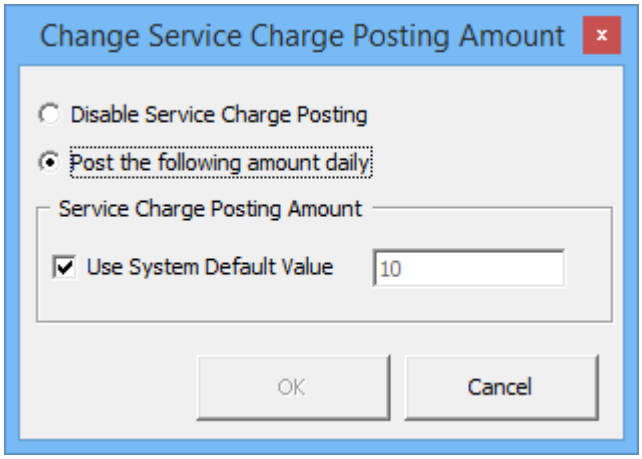
Posting a Service Charge

1. In the Guest Info tab of the selected account, click the **Service Charge** button to open the Change Service Charge Posting Amount window.

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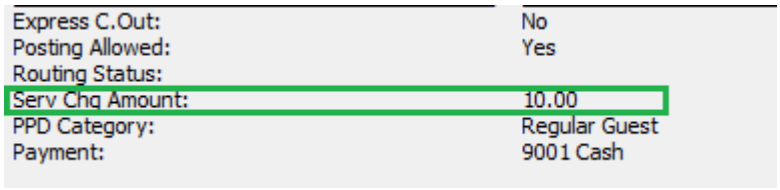
2. The default selection is **Post the following amount daily** with the **Use System Default Value** checkbox selected. Click **OK** to post.

Figure 10-26 Change Service Posting Amount



3. If the amount is not predefined, deselect the **Use System Default Value** checkbox and manually insert the amount.
4. In the Management prompt, select **Yes** to override the system default value.

Figure 10-27 Service Charged Posted



5. The service charge posted is shown in Guest Info tab.

Disabling Service Charge Posting

1. From the Change Service Charge Posting Amount window, select **Disable Service Charge Posting**, and then click **OK** to save.
2. At the Guest Info tab, the Service Charge Amount changes to No Service Charge Posting.

Disabling Service Charge Posting

1. From the Change Service Charge Posting Amount window, select **Disable Service Charge Posting** and then click **OK** to save.
2. In the Guest Info tab, the Service Charge Amount changes to No Service Charge Posting.

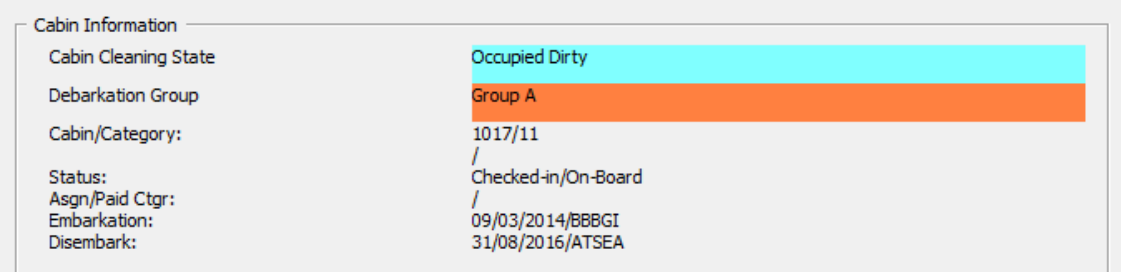
Add to Disembark Group

The Add to Disembark Group function allow you to organize disembarking passengers to disembark in batches at a designated assembly location, departure time, and luggage collection.

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1. In the Guest Info tab of the guest account, click **Add to Disembark Group**.
2. In the selection window, select the **available group** from the grid and then click **Select**.
3. At the Add guest to debarkation group prompt, click **Yes**.
4. The assigned debarkation group appears in the Guest Info tab, Cabin Information section.

Figure 10-28 Assigned Debarkation Group



Remove from Debark Group

When a passenger is wrongly assigned to a debarkation group, or would like to depart with friends, you must first remove the assignment and then reassign the passenger to the desired group.

To remove a passenger from the debark group, click the **Remove from Disembark Group** from the Guest Info tab.

Disc, Route, Pkg Tab

The Discount, Route, Package function routes the charges within the same invoice or to other crew prior to crew check-in if setup, enabling allowable discounts in Oracle Hospitality Cruise Shipboard Property Management System (SPMS) and Simphony. It also gives an overview of the Package Plan entitlement.

Routing

The Routing function automates the transfer of charges within the crew account or to multiple accounts, allowing you to consolidate charges into one invoice/account. The use of this function is to facilitate the invoicing process at the group reservations level or for parties/ families traveling together. Depending on the requirements, you can set up the routing using one of these options - “Pay for” or “Paid by”.

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Figure 10-29 Routing Tab

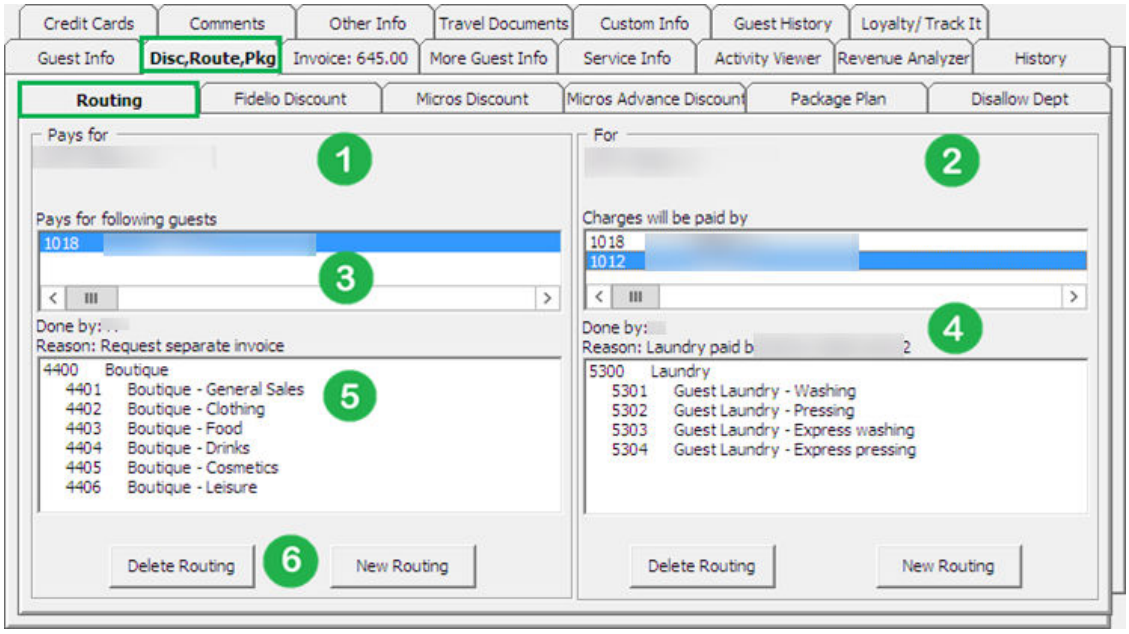


Table 10-17 Routing Tab Definition

Section	Description
1	Pays for - This section defines the payer account and whom the account is paying for.
2	For - This section defines where the assigned financial department is routed to.
3	Cabin number and name of guest payer is responsible for.
4	User who set up the routing and reason.
5	Financial Department code assigned.
6	Button to set up or remove routing instructions.

> **Note**
>
> Prior to moving/routing the charges, be sure to check the current routing arrangements to avoid duplication of routing, which will result to charges not being re-directed as planned.

Pay for Another Party

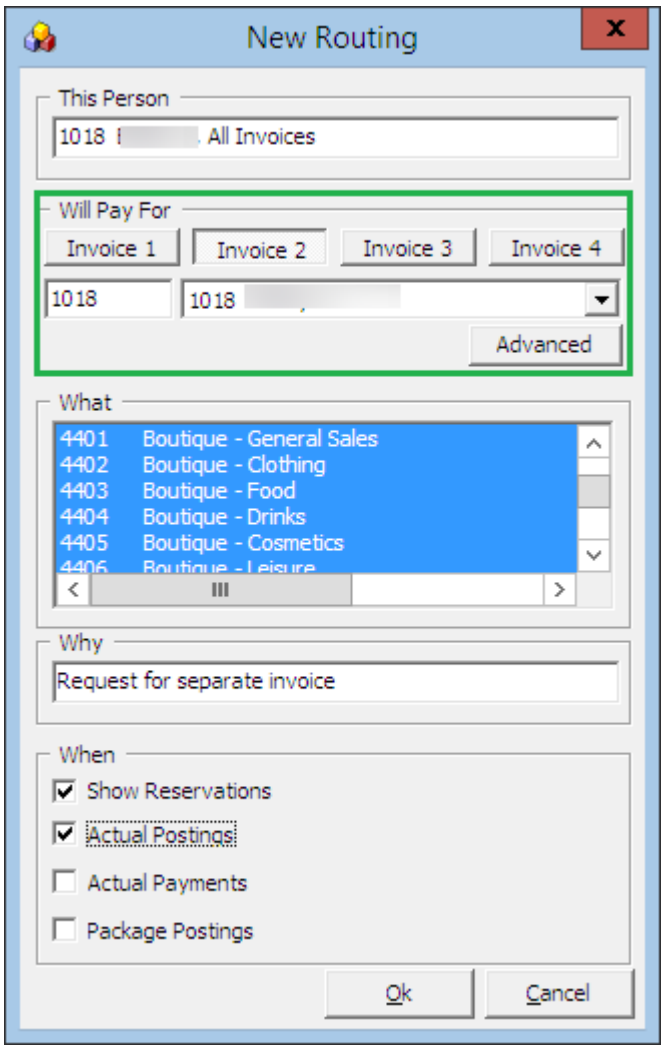
Use the following steps to set up an account/charge routing when guest A pays for guest B:

1. Search for the guest account and navigate to the Disc, Route, Pkg, Routing tab.
2. Click the **New Routing** button to open the routing dialog box.
3. Select the **Invoice number** to which you want to route the charges.
4. For charges within the same account, leave the cabin number and guest name as they are.

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5. For the guest who is paying for another account, change the cabin number and select the respective guest.

Figure 10-30 New Routing — 'Will Pay For'



6. Select the **Financial Department** group or codes to be routed and insert the routing reason.
7. Select the applicable options:
   - **Show Reservations:** Include expected to embark and reserve bookings. Checked-in booking is shown when the checkboxes are deselected.
   - **Actual Postings:** Actual postings routed to another account.
   - **Actual Payments:** Actual payments routed to another account.
   - **Package Postings:** Only route package postings.
8. Click **OK** to save.
9. Once saved, the selected assignments are added to **Pays for** in the Routing tab.

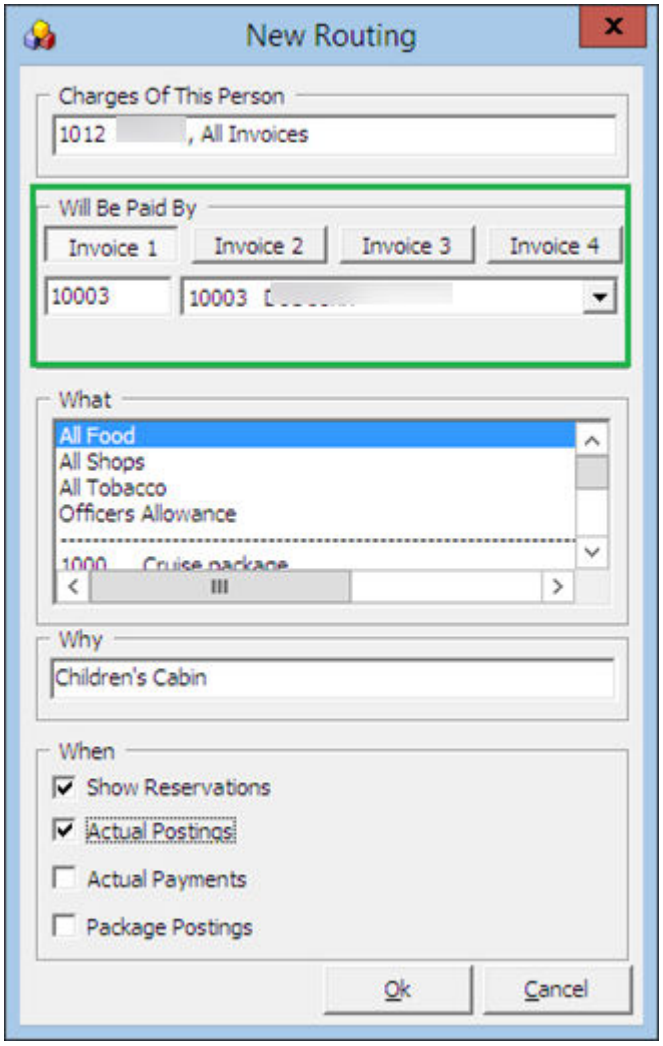
Paid by Another Party

Use the following steps to set up routing when guest B account/charges are paid by guest A:

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1. Search the guest account and navigate to the Disc, Route, Pkg, Routing tab.
2. Click the **New Routing** button under the **For** section to open the routing dialog box.
3. Select the **Invoice number** to which you want to route the changes.
4. Enter the cabin number and select the respective **guest name** from the drop-down list.

Figure 10-31 New Routing To — 'Will Be Paid By'



5. Select the **Financial Department** group or codes to be routed and insert the routing reason.
6. Select the options where applicable.
7. Click **OK** to save.
8. Once saved, the selected assignments are added to **Pays for** in the Routing tab.

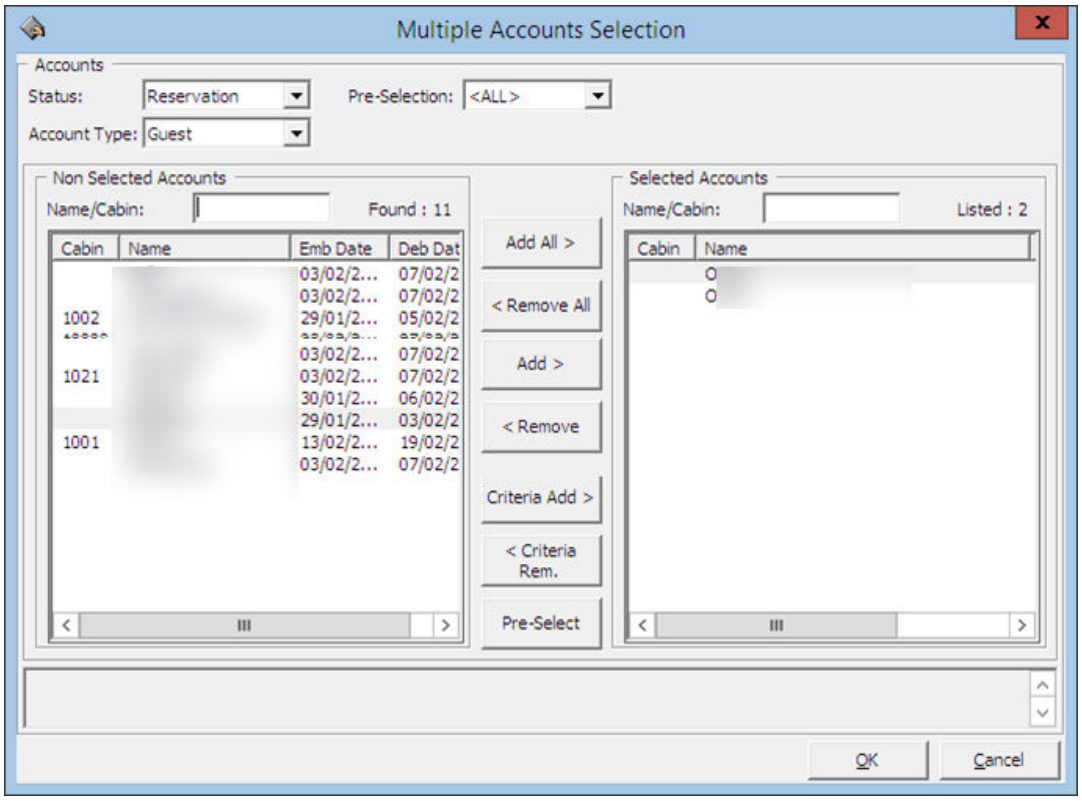
Advanced Routing

Use the following steps to set up routing for multiple guests, for example; group guests or parties traveling together.

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1. Search for the guest account and navigate to the Disc, Route, Pkg Routing tab.
2. Click **New Routing** to open the routing dialog box,
3. In the dialog box, click the **Advanced** button in the Invoice drop-down list to open the Multiple Accounts Selection window.
4. Guests listed in the Non Selected Accounts section are based on the default set in Status and Account Type criteria. You can change this criterion according to the user requirement.

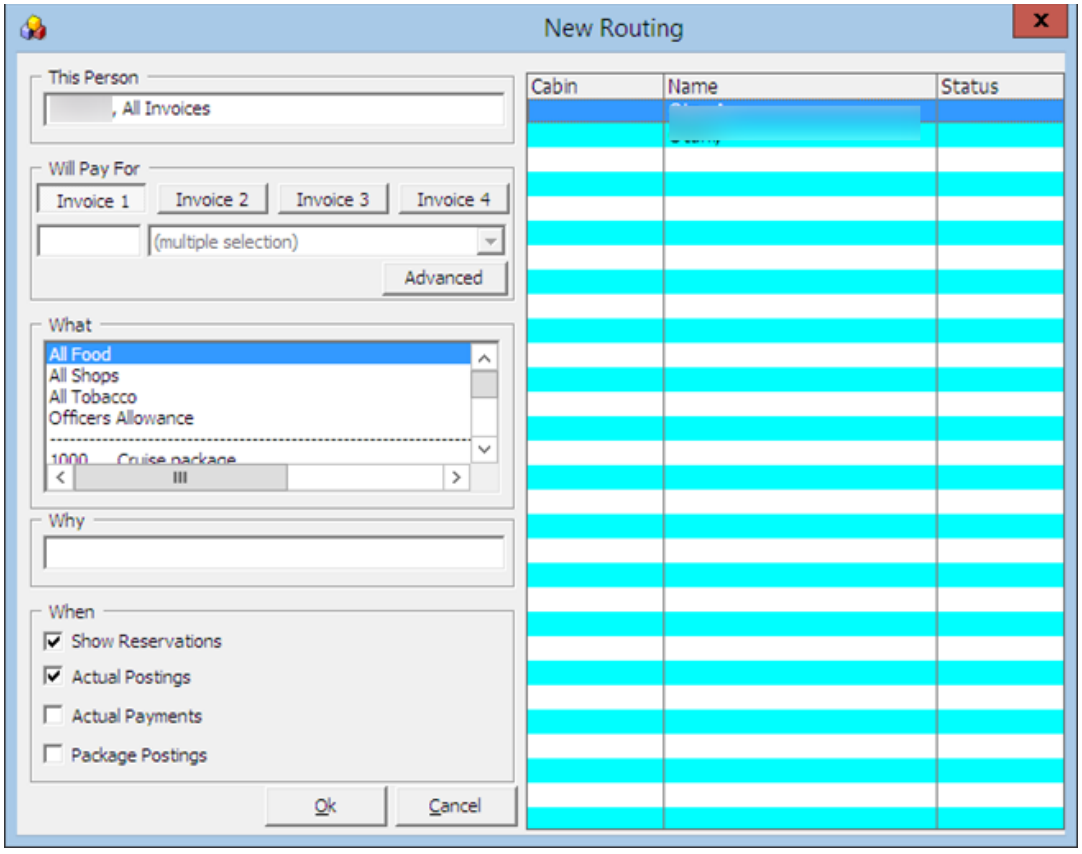
Figure 10-32 Routing Multiple Account Selection Window



5. To select all guests, click **Add All>** or individually select the guest, then click **Add>** to move the selection to the Selected Accounts pane.
6. Click **OK** to confirm the multiple accounts selection. This opens the New Routing window with the selected guest account listed.

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Figure 10-33 Routing Multiple Account Instructions



7. In New Routing, select the **Financial Department, Reason** and when the routing should occur, and then click **OK** to initiate the multiple account routing instructions.
8. During the assignment process, the status of the guest account changes to **OK**, followed by **Done**, and the New Routing window closes automatically once the process completes.

Deleting an Existing Routing

Use the following steps to remote the routing set up in a guest account.

1. Search the guest account and navigate to Disc, Route, Pkg Routing tab.
2. Select the **sub-financial department code** to delete the individual assignment, or the **Main Financial Department** to delete all, and then click **Delete Routing**.
3. The system prompts for a confirmation to delete the assignment. Click **Yes** to confirm or **No** to return to the Routing window.

SPMS Discount

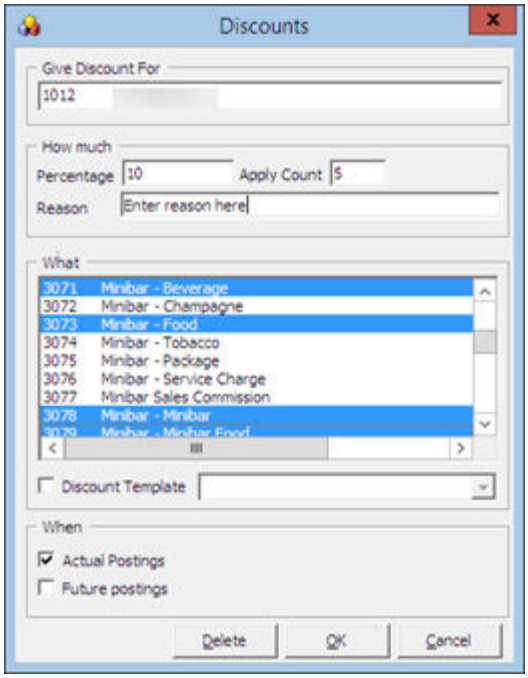
The SPMS Discount function enables you to assign eligible discount to a guest account either by percentage or value.

Assigning a Discount

1. In the guest account, navigate to Disc, Route, Pkg SPMS Discount tab.

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Figure 10-34 SPMS Discounts Window



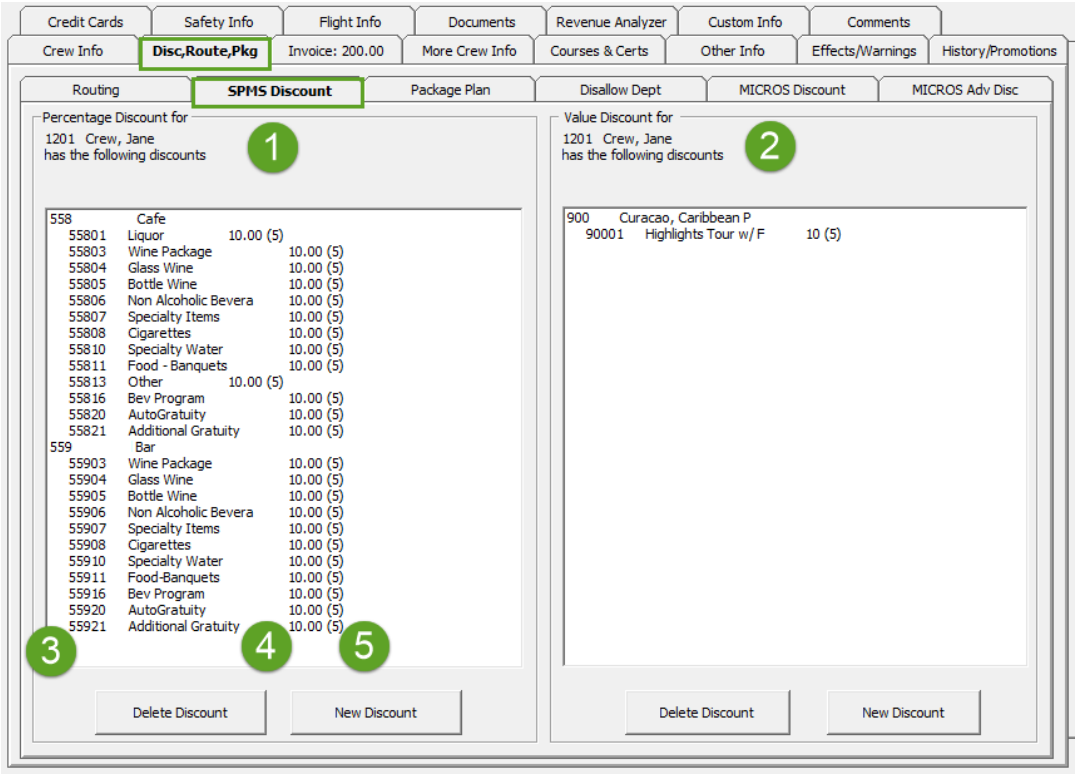
2. Click the **New Discount** button to open the discount dialog box.
3. Insert the **Percentage** and the **number of counts** in the Apply Count field if the discount is applicable **X** number of times. For example, enter 1 to specify a one time discount for every selected department code, or leave it as *blank* for *unlimited* discount for every selected department.
4. Select the **Posting Department** by the department group or individually. For example, All Food/Beverage or Room Service Food only.
5. You can also use the Discount Template by selecting the **checkbox** and a **template** from the drop-down if they are pre-configured. See *Administration Chapter – Discount Template* for setup procedures.
6. Select the **Actual Postings** checkbox or the **Future Postings** checkbox to indicate when to apply the discount.
7. Click **OK** to save.

> **Warning**
>
> Once a discount is applied to an actual posting, it *cannot* be reversed. If the discount has a count indicator, the system posts the discount until it reaches the count indicated, and no further discount will be accorded to postings thereafter.

8. The system saves the assigned discounts in the SPMS Discount tab. Similarly, the assigned discounts are added when Future Posting is selected in Criteria Discount.

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Figure 10-35 Disc, Route, Pkg — SPMS Discount Tab



a. Financial Department codes entitled to Percentage discount.

b. Financial Department codes entitled to Value discount.

c. Financial Department codes and description.

d. Discount value (percentage or value).

e. No. of count assigned to each financial code. 0 = unlimited.

9. If an Actual Posting is selected, the system posts a reversal against the original posting, sets the adjusted posting to No Print automatically, and then reports the correct value with the discount indicated.

Deleting a Discount

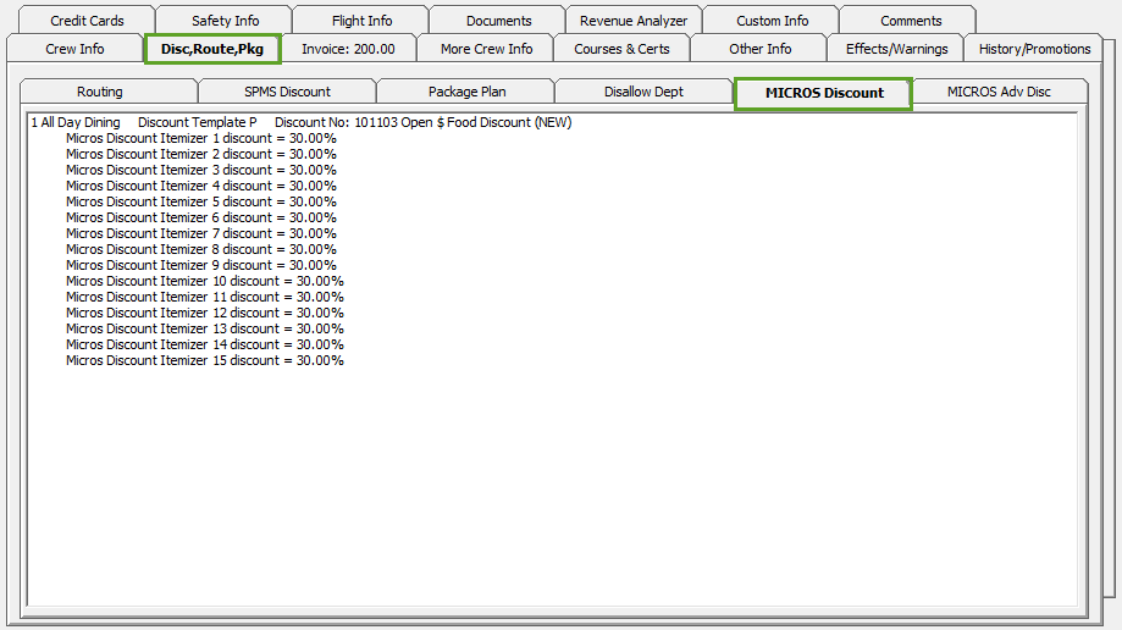
1. In the Disc, Route, Pkg, SPMS Discount tab, select the **Financial code** to delete, then click **Delete Discount**.
2. If **Delete Discount** is clicked *without* first selecting any Financial code, this will delete **All** assignment from the respective window.

MICROS Discount

The MICROS Discount tab displays discounts accorded to the guest by POS Discount Itemizer level. These discounts are shown when a guest has a discount level assigned in the Guest Info, Edit Information, Discount Template field.

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Figure 10-36 Disc, Route, Pkg — Micros Discount

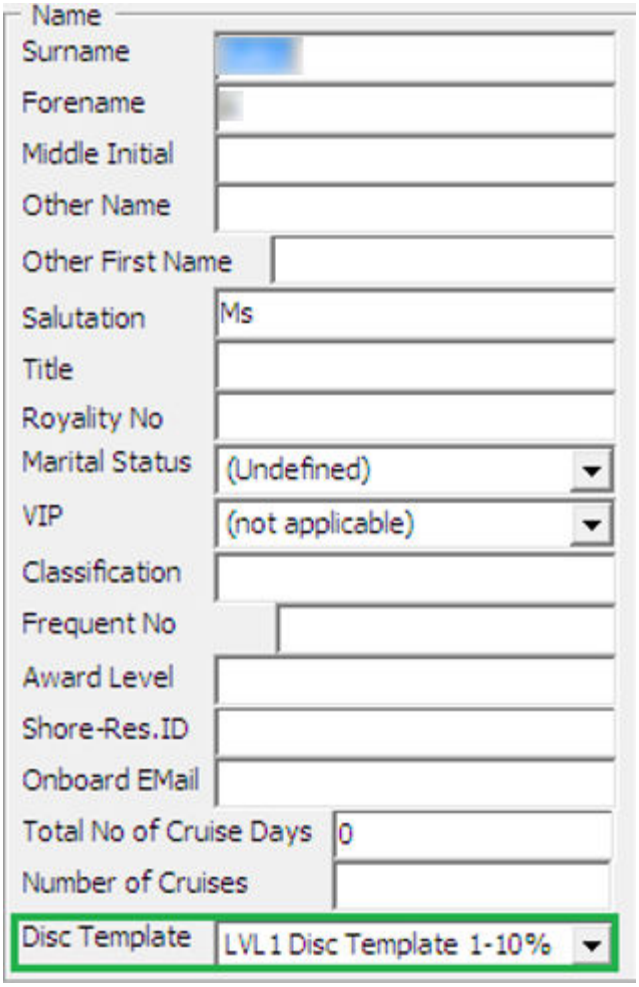


Assigning Point-of-Sale (POS) Discount Level

1. Search for the guest account in the Search panel.
2. In the Guest Info tab, click **Edit Information** to open the Edit Guest Information window.
3. In the Name section, select the **discount template** from the drop-down list.

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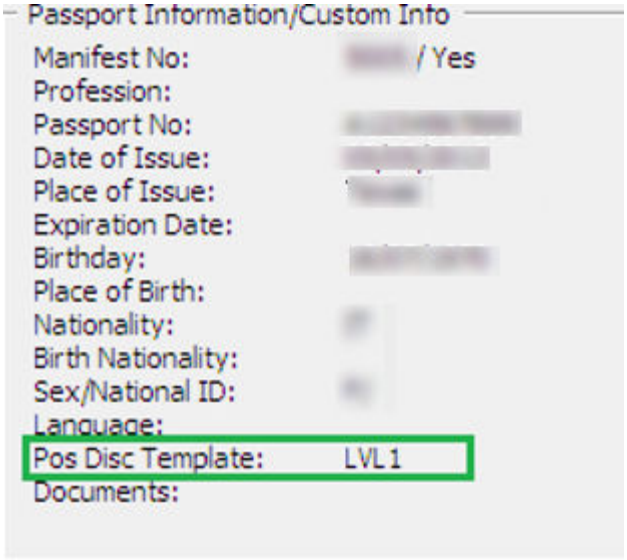
Figure 10-37 POS Discount Level Assignment



4. Click **OK** to save.
5. The assigned POS Discount template appears in the **Passport/Custom Information** section.

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Figure 10-38 Assigned POS Discount Template



6. To view eligible POS Discounts by Itemizer level, go to the Disc, Route, Pkg, Micros Discount tab.

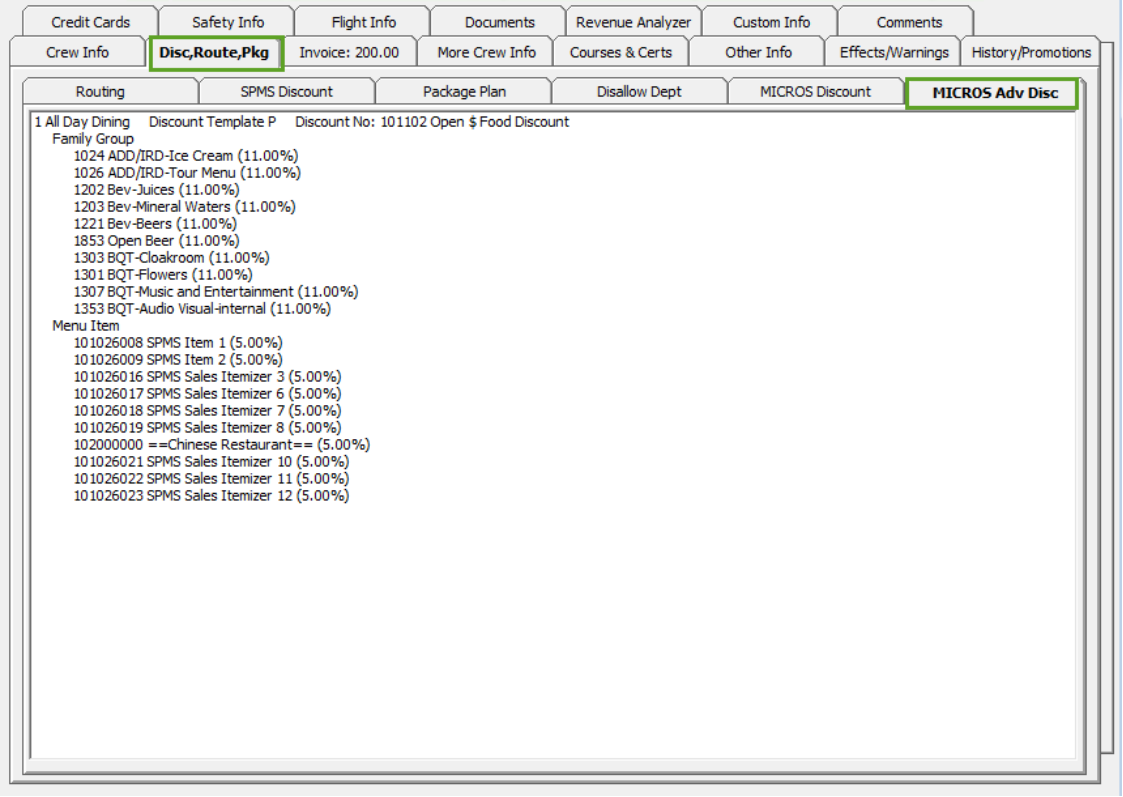
   See also *Administration, POS Discount* section on how to configure the Discount Itemizer.

Micros Advance Discount

The Micros Advance Discounts works similarly to Micros Discount, except that discounts are applied to *POS Major Group, Family Group* and *Menu Item level* instead of Itemizer Level.

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Figure 10-39 Micros Advance Discount



See *Administration, POS Discount* on how to configure the Advance Micros Discount.

Disallow Department

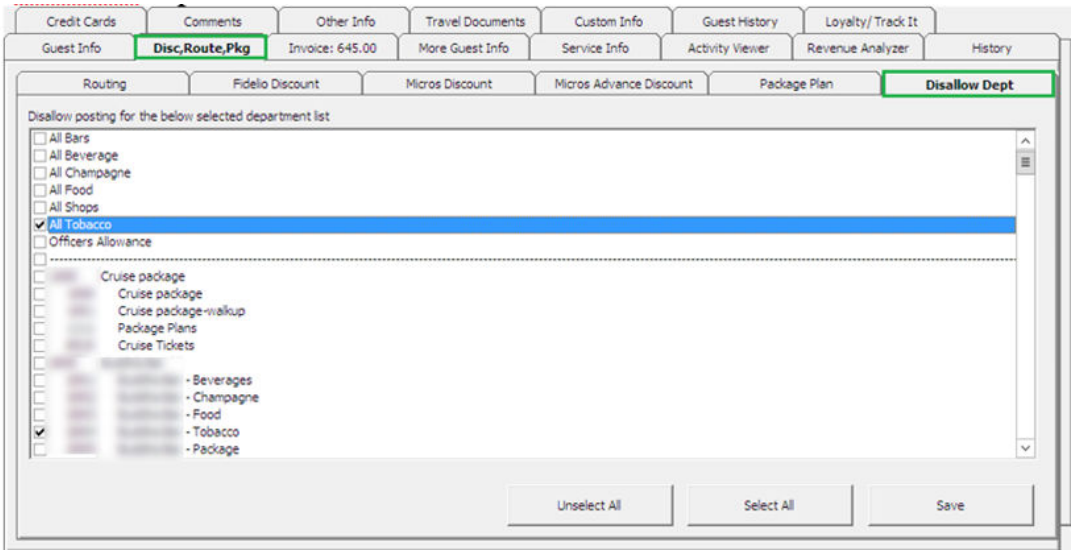
The Disallow Department function manages charges *not* permissible for posting to the guest account. For example, Casino Bar, all tobacco, and others.

Setting Disallow Department

1. Retrieve the guest account, then navigate to the Disc, Route, Pkg Disallow Posting tab.
2. Select the **Financial Department** codes to disallow either by **Group** or **Individual department code** from the list and then click **Save.**

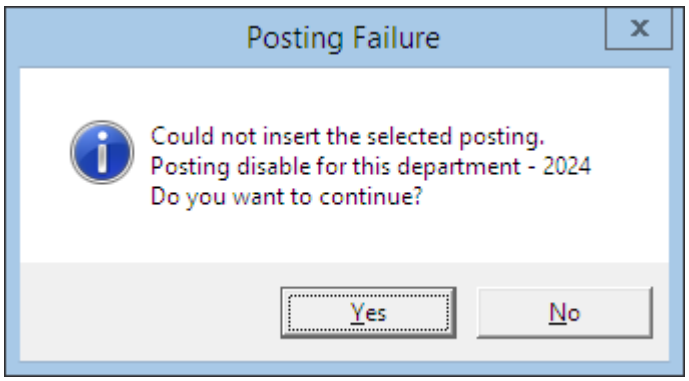
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Figure 10-40 Disallow Department tab



3. When a posting matches the disallowed department, the system displays a Posting Failure message.

Figure 10-41 Disallow Department Posting Failure Prompt



4. Click **Yes** to exit without posting or **No** to return to the Add posting window.

Package Plan

The Package Plan function enables you to customize a cruise package that suits the guest requirements by combining various food and beverage outlets, excursions, and/or activities using the flexi package plan option.

Assigning / Purchasing a Package Plan

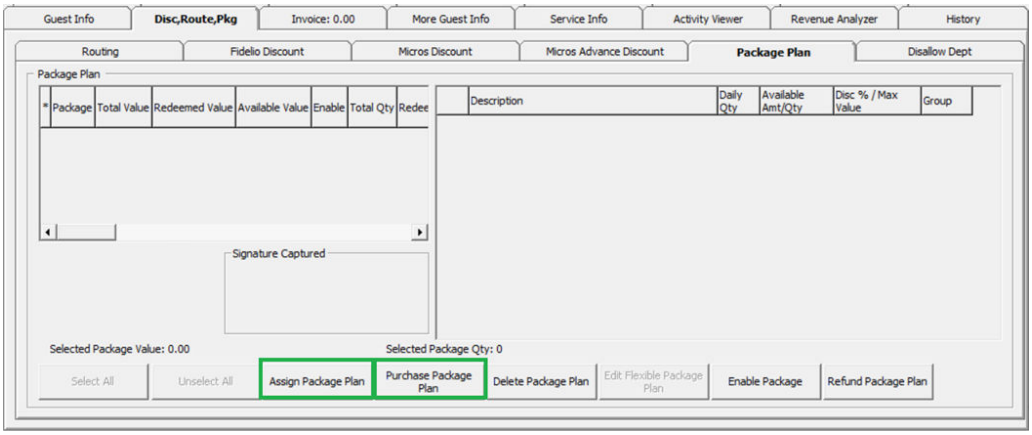
Assigning packages to the right guest account enables transactions to be posted accurately throughout the cruise.

1. In the Guest Handling window, search and select the **guest record** using the guest name or cabin number.
2. In the selected guest record, select the Disc, Route, Pkg tab and then select the **Package Plan** tab.

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3. Select one of the following 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.

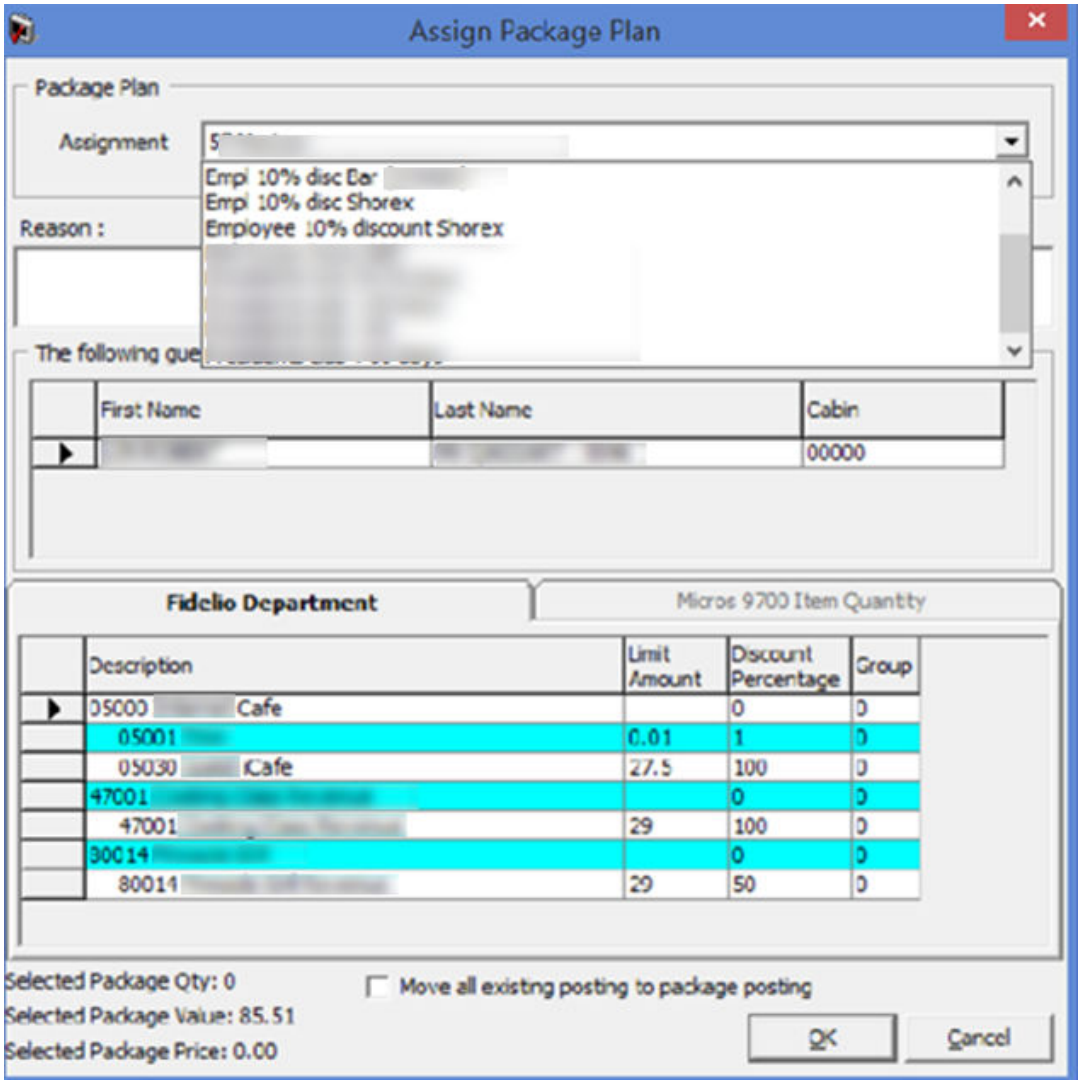
Figure 10-42 Package Plan Options



4. In order to assign/purchase a package, select the available package from the drop-down list and then enter the **Reason**.

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Figure 10-43 Package Plan Assignment Window

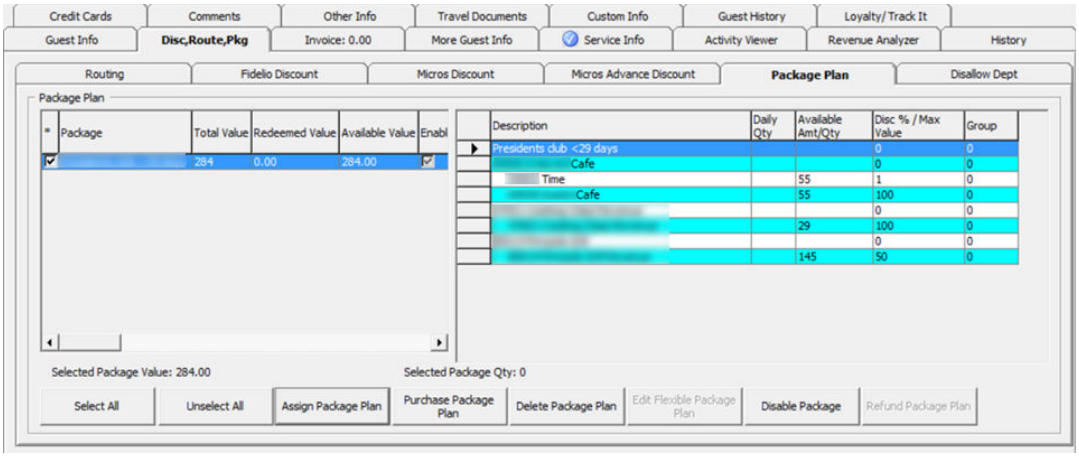


> **Note**
>
> Select the **Move all existing posting to package posting** only when you wish to move the existing postings to a package plan. For example, a guest purchases the package part way through the cruise, and past postings that meet the package elements are to be considered as a package plan.

5. Click **OK** to save.
6. Information's pertaining to the package appears in the **Package Plan** tab and status is **Active**.

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Figure 10-44 Package Plan Assigned / Purchased

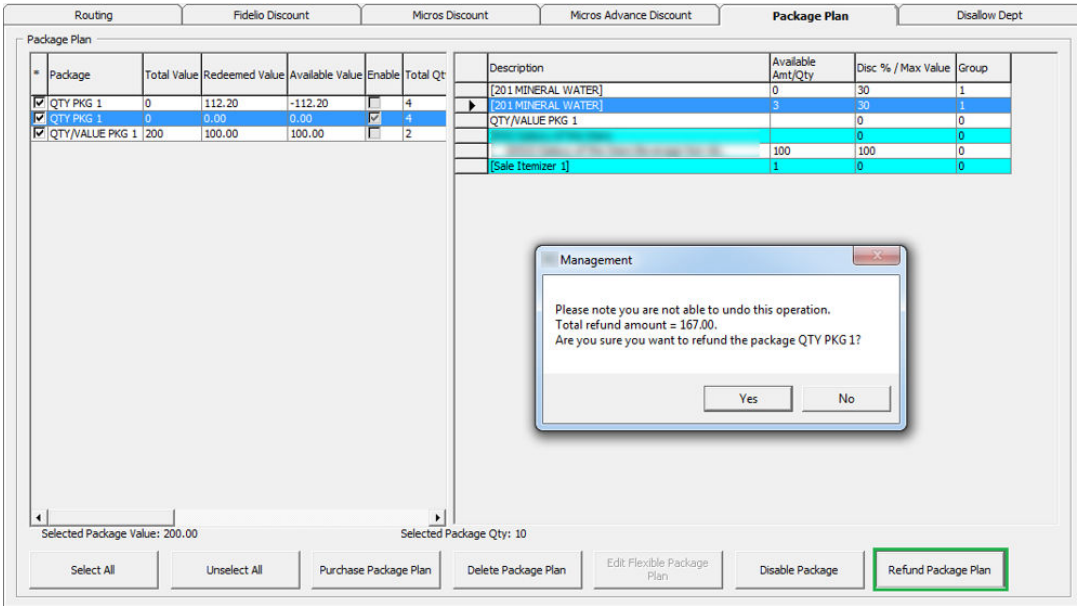


Refunding a Package Plan

The unused package plan is refundable to the guest at the end of the cruise. Use the following steps to refund a Value based package, Quantity based package, and Mix package.

1. In the Guest Handling window, search and select the guest record using the guest name or cabin number.
2. In the selected guest record, navigate to the Disc, Route, Pkg tab, and then to the Package Plan tab.

Figure 10-45 Package Plan Refund Option



3. Select **Refund Package Plan**.

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

4. Once the package plan is refunded, the system disables the package and displays the remaining value/quantity for references only.
5. In the event where the postings are more than the package price, the system prompts that the refund is not allowed.

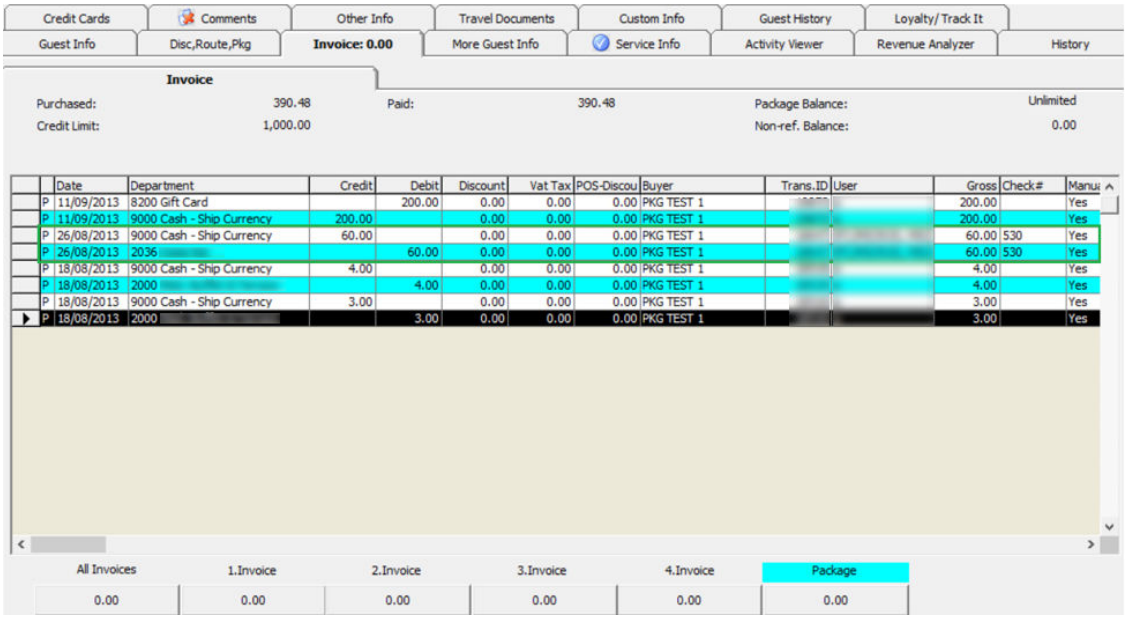
Routing a Package Plan Posting

Routing a package plan postings depends on two parameters: **Do not allow post package to both buyer and payer** and **Package Plan Before Routing**. In the event that both payer and buyer have a package, all postings are posted to the payer account as a normal posting.

Auto Balancing a Package Plan

An Auto Package Plan balancing can be set up using the **Enable Package Auto Balance as 1** parameter. The Auto Package Plan automatically balances the package invoice/account after each transaction and reduces the total package value or quantity at the same time.

Figure 10-46 Package Plan Invoice Window



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

Balancing a Package Invoice Manually

1. Log in to the Management module, and in the menu bar, select **Cashier**.
2. Select **Guests** from the drop-down list to open the Guest Handling window.

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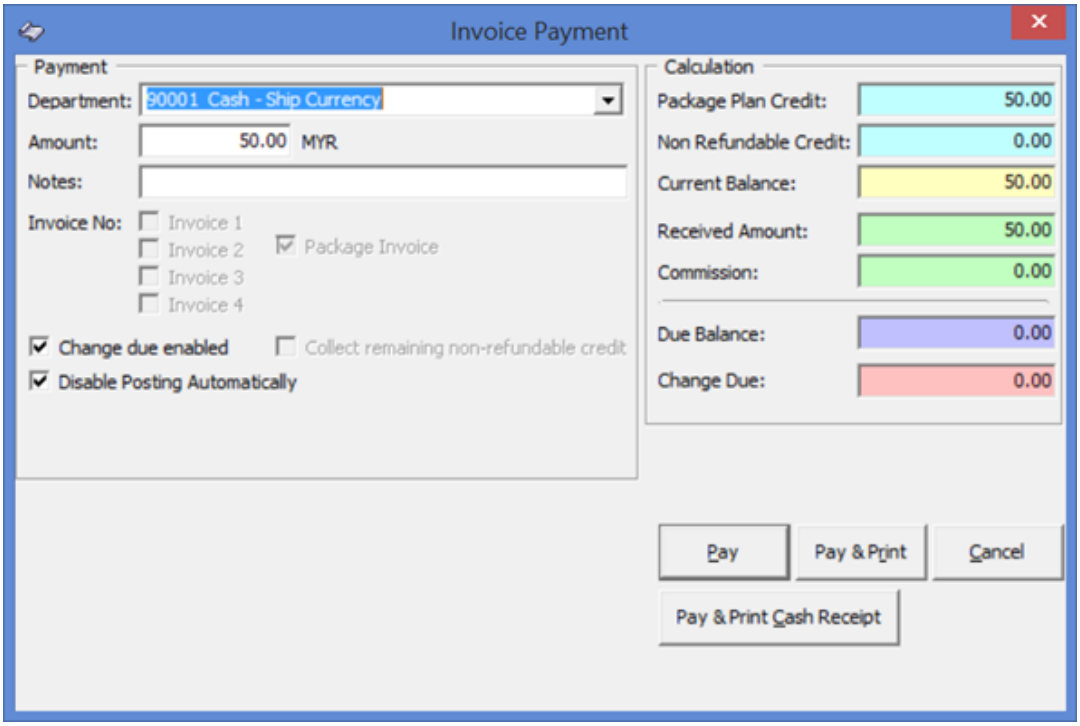
3. In the Guest Handling window, search and select the **guest record** using the guest name or cabin number.
4. Navigate to the Invoice tab, and then click the amount under the Package Invoice.

Figure 10-47 Settling a Package Plan



5. Select the **Payment method** and verify the amount to settle when prompted. Click **Pay or Pay & Print** to pay and print the invoice at the same time which reduces the Package Invoice balance accordingly.

Figure 10-48 Paying an Invoice



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Invoice Tab

The Posting Handling function not only provides up to four invoices per guest, it also enables you to post a manual charge to an account, route postings, and handle various payment processes.

Figure 10-49 Add Posting Window

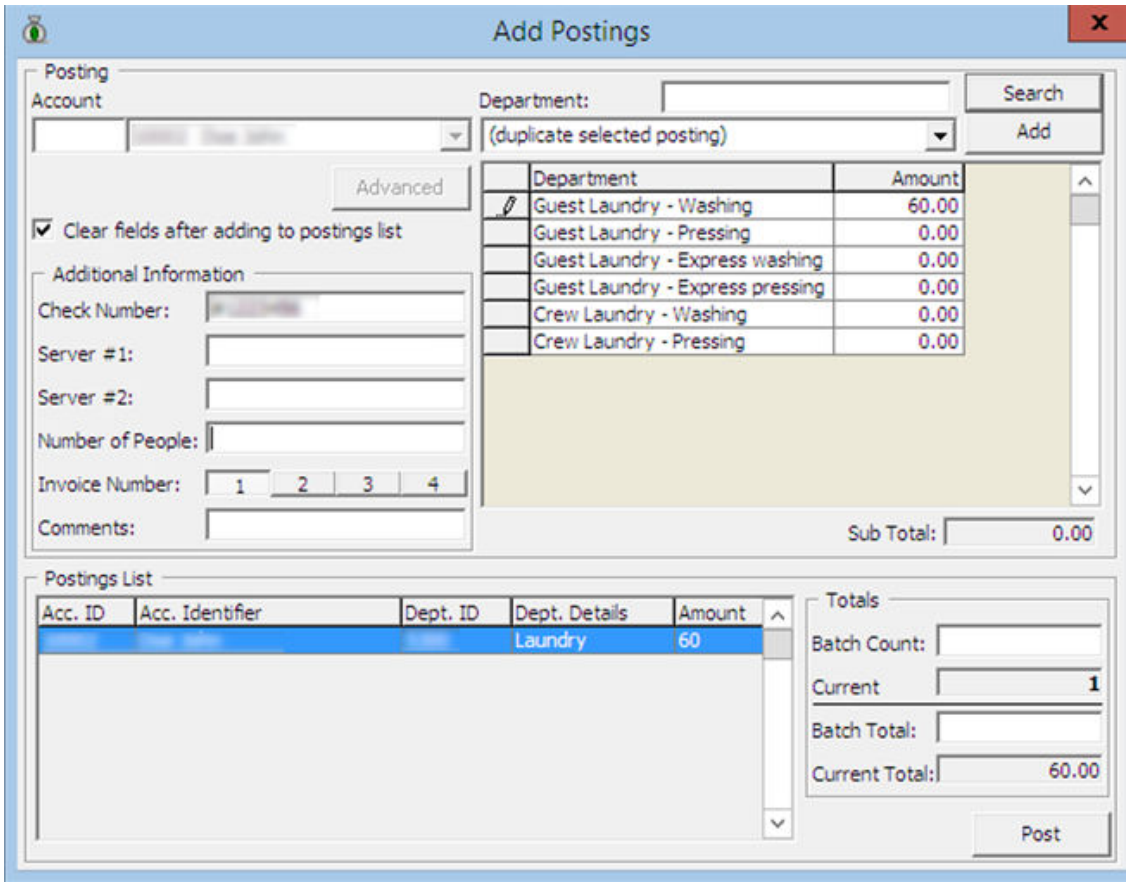


Table 10-18 Field Definition of Add Posting Window

Field	Description
Account	Guest Account by Cabin No. and Name.
Department	Financial Department codes.
Clear fields after adding to postings list	Clear all information in Additional Information section after adding posting.
Check Number	Check Number from POS System or any manual posting reference.
Server #1:	Server name appearing on POS check.
Server #2:	Server name appearing on POS check.
Number of People	No. of guest that dined. Information from POS System.

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Table 10-18 (Cont.) Field Definition of Add Posting Window

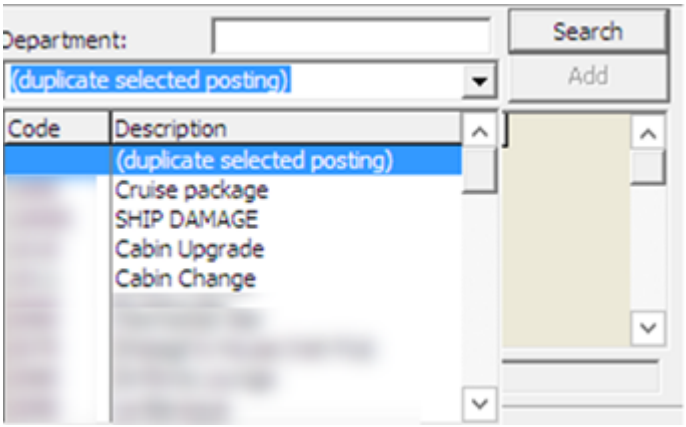
Field	Description
Invoice Number	Invoice number to post to.
Comments	Additional comments.
Posting List	List of postings added.
Batch Count	Confirmation of a number of postings added in Quick Posting function.
Current Count	Current count recorded in Postings List.
Batch Total	Confirmation of total value posted in Quick Posting function.
Current Total	Accumulated value to post.

Add Posting

Add Posting allows you to post and/or manually adjust a charge.

1. Retrieve the guest account from the Search panel, then click **Add Posting** in the Guest Handling window.
2. At the Add Postings from, select the **Financial Department** from the drop-down list or use the Search option for a department code.

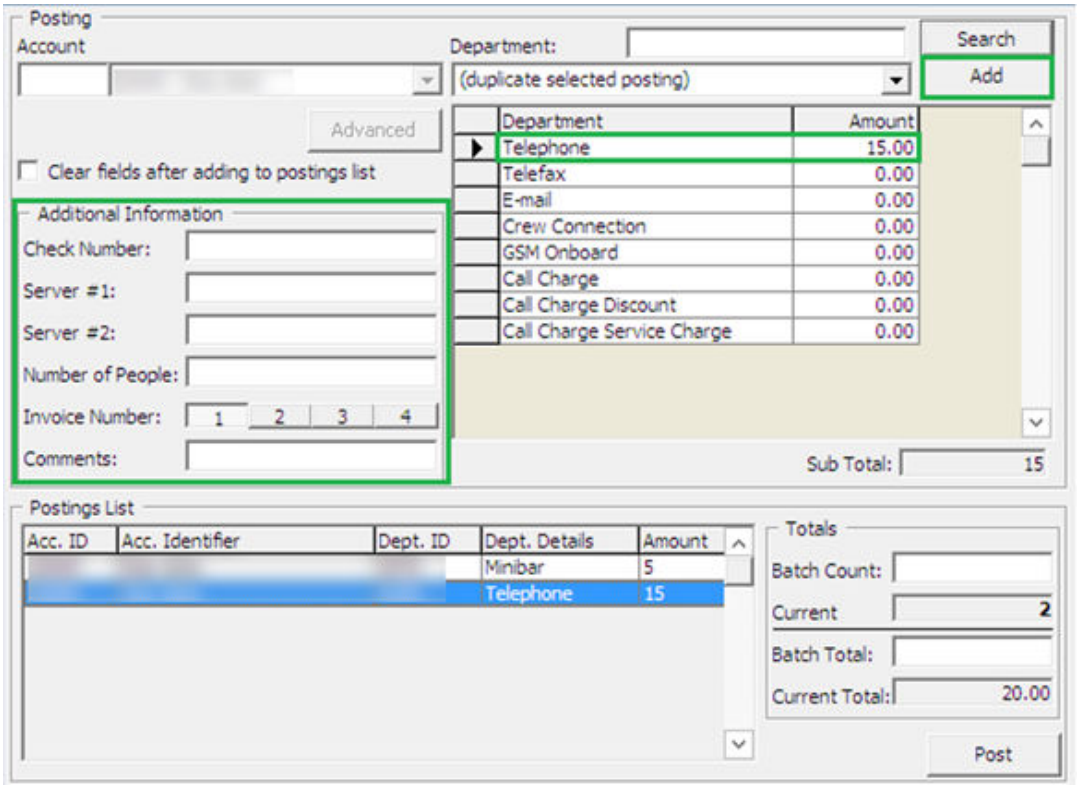
Figure 10-50 Add Posting Financial Department Selection



3. Insert the **Value, Check Number** and select the **Invoice number** to post, then click **Add**. This transfers the posting to the **Posting List**, enabling you to post more than one charge.

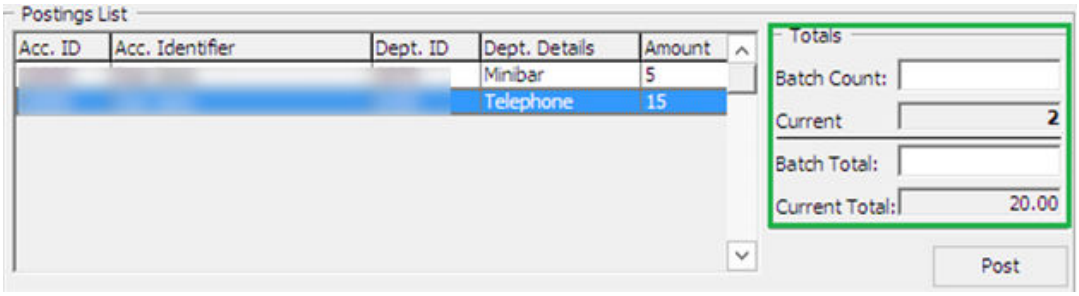
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Figure 10-51 Adding a Charge



4. Item count increases automatically when the posting is more than one.

Figure 10-52 Add Posting Count



5. Click **Post** to finalize the posting(s).
6. Posting will appear in the Invoice tab, among other posted charges.

Void Posting

The Void Posting function is used to adjust the earlier posted transactions.

Voiding a Posting

1. Search for the guest account in the Guest Handling window and navigate to Invoice tab.
2. On the Invoice tab, select the transaction to void, then click the **Void** button.

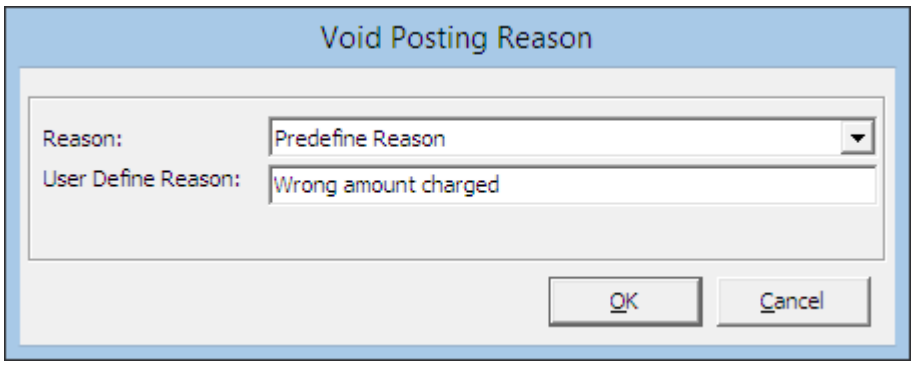
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Figure 10-53 Void Posting



3. The system prompts you to confirm the charge to void, indicating the outlet name and amount. Click **Yes** to confirm.
4. Insert the void reason or select from the drop-down list, and click **OK**.

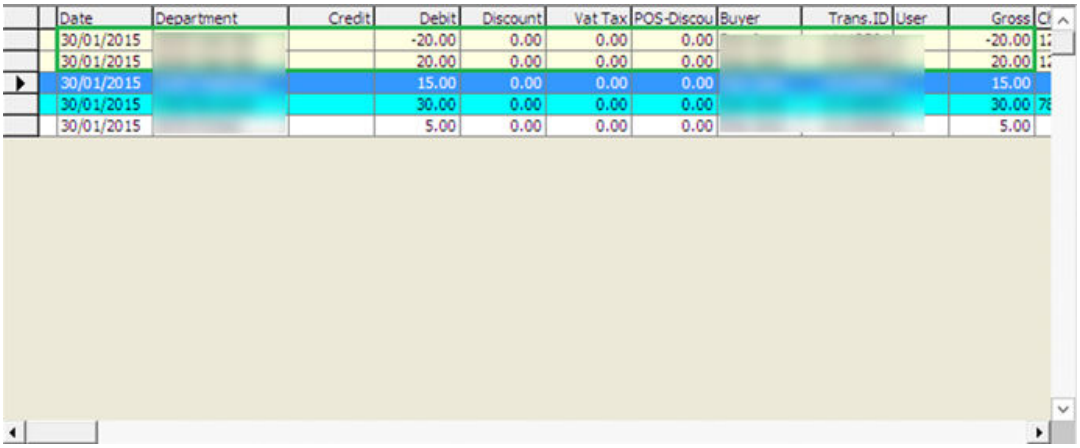
Figure 10-54 Void Reason Prompt



5. Voided postings become highlighted in a light color with a matching debit and credit amount.

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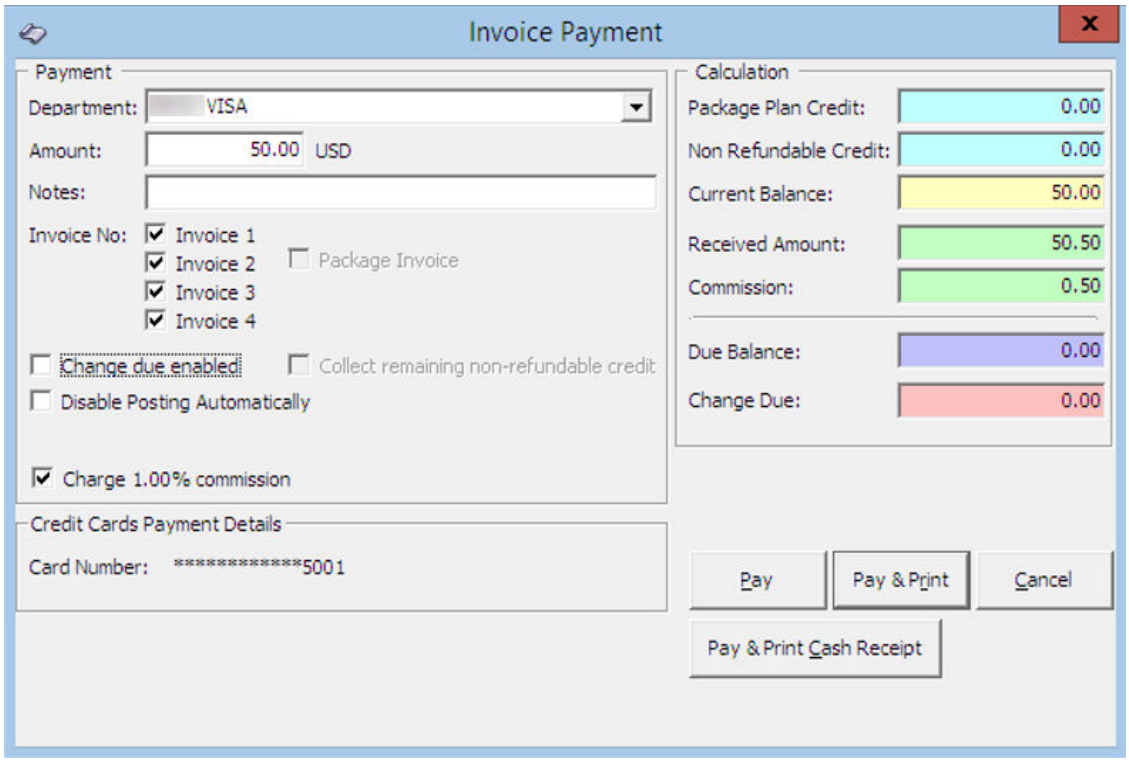
Figure 10-55 Invoice Display of Voided Transaction



Pay Invoice

The **Pay Invoice** function is a settlement process against an invoice for part or full payment. As the Ship accepts various payment method, the process in applying these payments may vary.

Figure 10-56 Invoice Payment Window



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Table 10-19 Field Definition of Invoice Payment Window

Field	Description
Department	Financial Department codes - Credit.
Amount	Total amount due by guest, depending on the invoice no. selection.
Notes	Additional notes pertaining to this payment.
Invoice Number	Invoice number to apply the payment.
Change due enabled	Enable auto calculation of change due to guest.
Disable Posting Automatically	Disable postings being posted into the invoice. This sets the **Posting Allowed** to ***No*** in Guest Info tab.
Charge 1% Commission	Credit Card commission charge. Amount auto populates in **Commission** field when checked.
Credit Cards Payment Details	Displays masked credit card number assigned to this invoice.
Package Plan Credit	Eligible credit value for Package Plan posting.
Non Refundable Credit	Credit value non-refundable to the guest.
Current Balance	Current Invoice Balance.
Received Amount	Amount received.
Commission	Applicable credit card/foreign exchange commission value. Calculate when Charge 1% Commission is ticked or when the foreign exchange has commission defined.
Due Balance	Outstanding sum after deducting payment applied.
Change Due	Balance due to guest when payment applied is more than invoice value.
Pay	Apply payment receipted and does not print cash receipt.
Pay & Print	Apply payment receipted and print invoice at the same time.
Pay & Print Cash Receipt	Apply payment receipted and print cash receipt at the same time.

Payment by Cash, Change Due

The Change Due function calculates the amount of change due to a guest when the payment method is either cash or foreign currency. The option is available to default the “change due enabled” to be permanently selected. If this is not set as the default, you must select this option to activate the automatic Change Due calculation when applied to the payment.

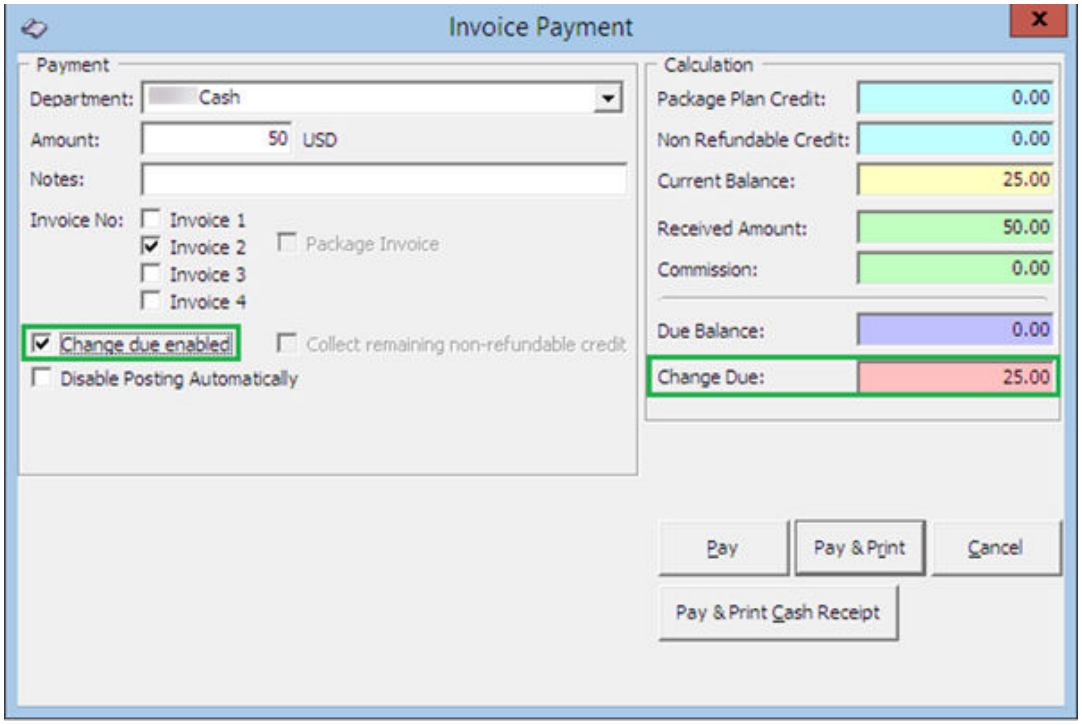
Paying an Invoice by Cash

1. Retrieve the guest account from the Search panel and then click the **Pay Invoice** button in the **Guest Handling** window.
2. The payment department is defaulted to the payment method defined during check in. Select **Payment Department** from the drop-down list, either Cash or Foreign Currency.

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3. Select an **invoice** to apply the payment and the system then calculates the total amount due by the guest.
4. Enter the amount to settle.
   - If “Change due enabled” is selected and the amount entered is more than the Current Balance, the system automatically calculates the change due amount and sets the invoice to zero balance. See Figure 10-57.
   - If the payment applied *does not have* “Change due enabled” selected, the system then posts the amount as a negative value in Due Balance, resembling a deposit posting. See Figure 10-58.
   - If the payment is an exact amount, the system posts the value as payment receipt. See Figure 10-59.

Figure 10-57 Invoice Payment with Change Due



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Figure 10-58 Invoice Payment without Change Due

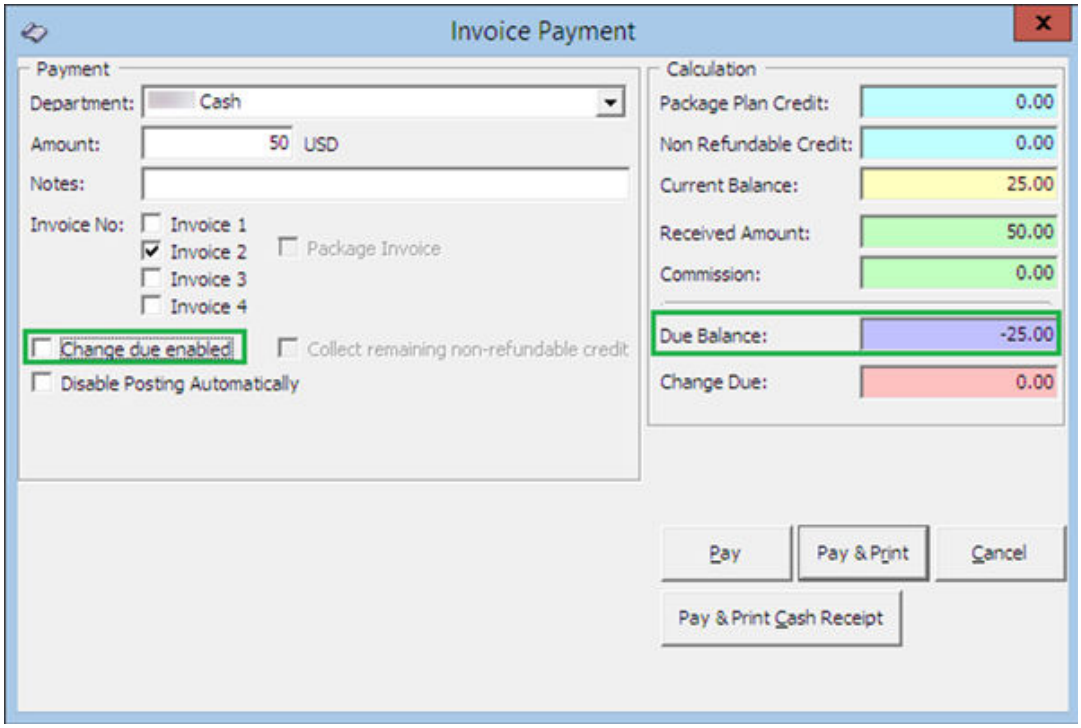
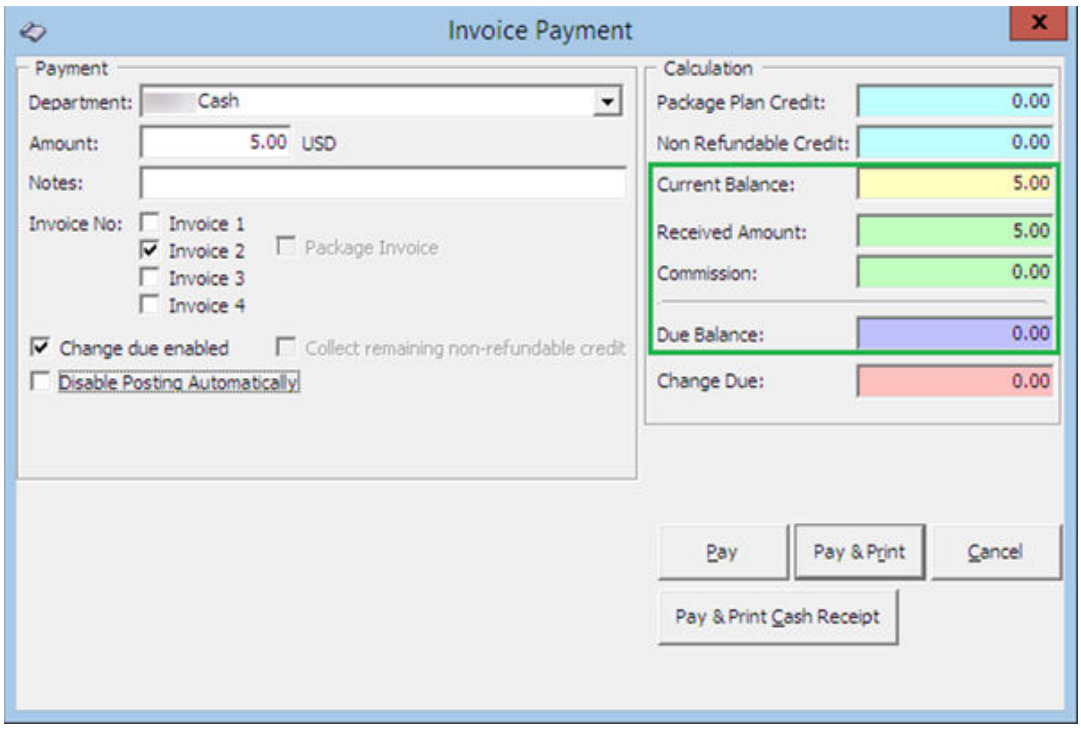


Figure 10-59 Invoice Payment with Exact Amount



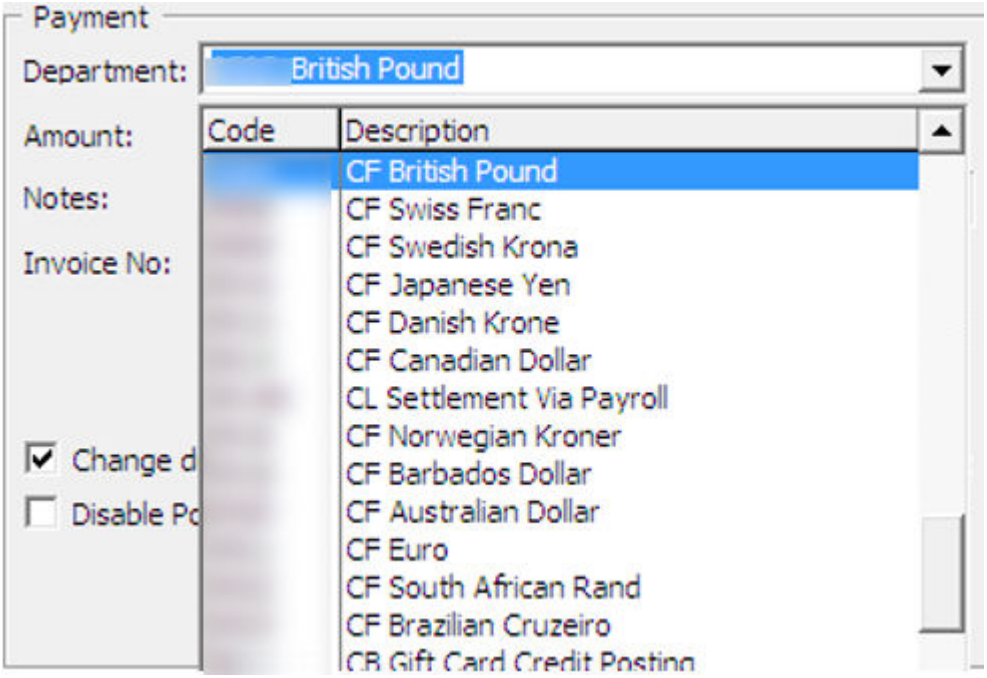
5. Select either **Pay, Pay & Print or Pay & Print Cash Receipt** to complete the transaction. If **Pay** is selected, be sure to print a copy of the invoice for guest reference.

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Paying an Invoice with Foreign Currency

1. Retrieve the guest account from the Search panel and then click **Pay invoice** at the **Guest Handling** window.
2. The system defaults the payment department according to the payment method defined during check-in. Select **Foreign Currency Payment department** from the drop-down list.

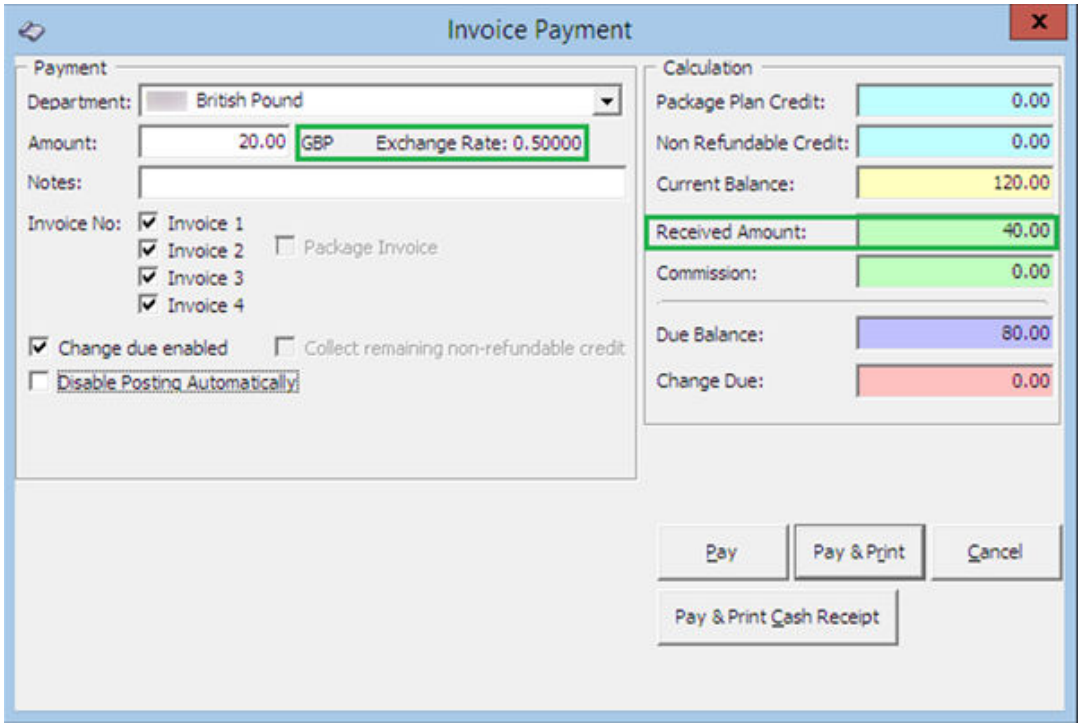
Figure 10-60 Foreign Currency Financial Department



3. The exchange rate of the selected payment method appears next to the amount field.
4. Enter the foreign currency amount, and the system then converts the value as shown in Received Amount.

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Figure 10-61 Invoice Payment with Foreign Currency



5. Select an invoice to apply this payment and the system then calculates the total amount due by the guest.
6. If the exchanged amount in foreign currency is more than the invoice amount, the system automatically calculates the change due amount in *Ship* currency when the 'Change Due Enable' is set as the default.
7. Click either **Pay, Pay & Print, or Pay & Print Cash Receipt** to complete the transaction.

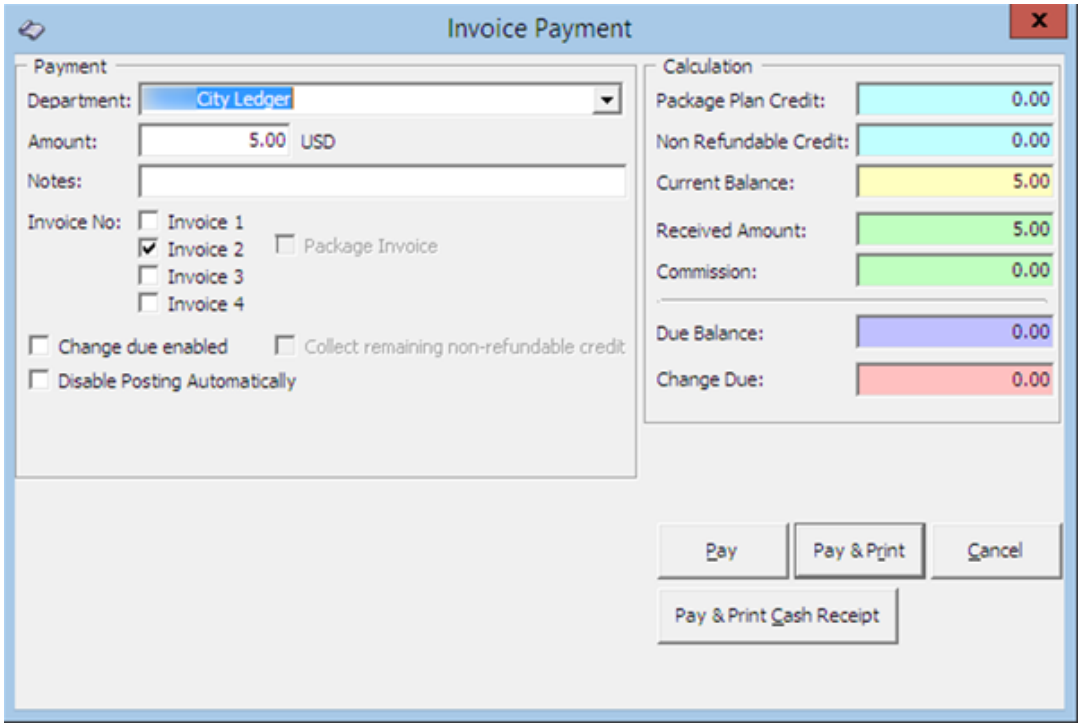
Paying an Invoice by City Ledger

City ledger settlement is permissible only when there is a pre-arranged payment mode. For example, the account is settled by a company or an agent within agreed payment terms. The invoice is typically transferred to an Account Receivable, being the holding account and will age until payment is received.

1. Retrieve the guest account from the Search panel, and then click **Pay Invoice** in the Guest Handling window.
2. The system defaults the payment department according to the payment method defined during check-in. Select the **Payment department** from the drop-down list.
3. Select an **invoice** to settle, and the system then calculates the total amount due by the guest.
4. Insert the amount to settle.
5. If the exact amount is paid, the system sets the value as payment receipted and Due Balance is 0.00.

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Figure 10-62 Invoice Payment by City Ledger



6. Select **Pay** or **Pay & Print** to complete the transaction. If **Pay** is selected, be sure to print a copy of the invoice for guest reference.

Disable Posting Automatically

Deselecting the **Disable Posting Automatically** checkbox sets the *Posting Allowed* to *No* in the Guest Info tab when the invoice balance is 0.00.

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Figure 10-63 Disable Posting Automatically

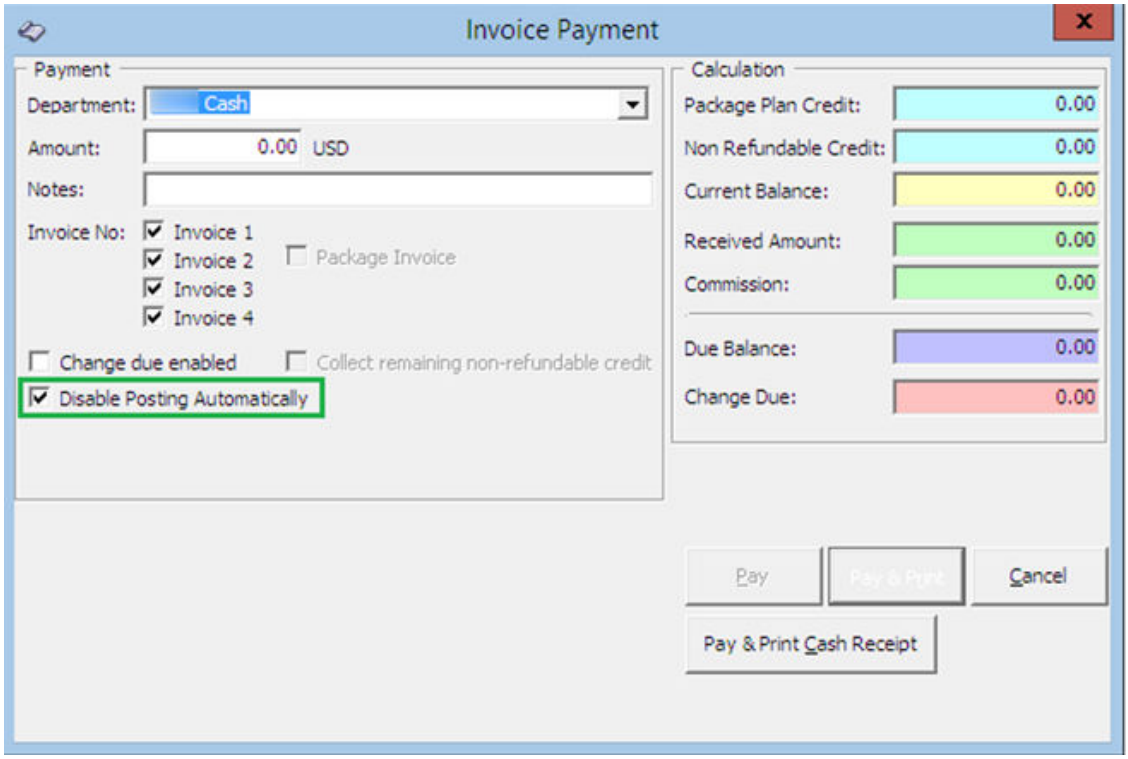


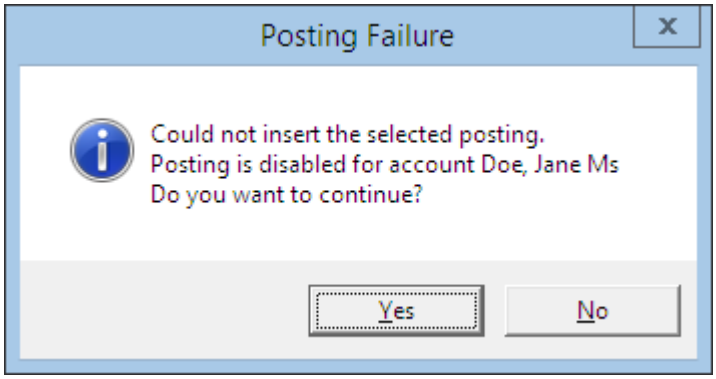
Figure 10-64 No Posting Allowed in Guest Info Tab



The system prompts the Posting Failure message below when a user tries to post a charge to this invoice and rejects the posting.

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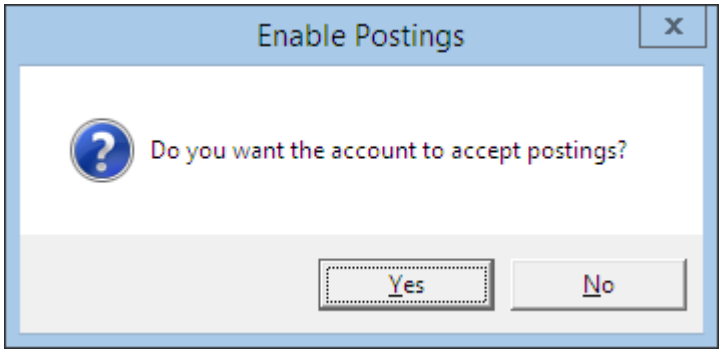
Figure 10-65 Disable Posting Prompt



Resetting Posting Status to Allowed

1. Click **Posting Status** in the Guest Info tab.
2. At the Enable Posting prompt, select **Yes** to confirm and resets the posting allowed to Yes.

Figure 10-66 Reset Posting Status

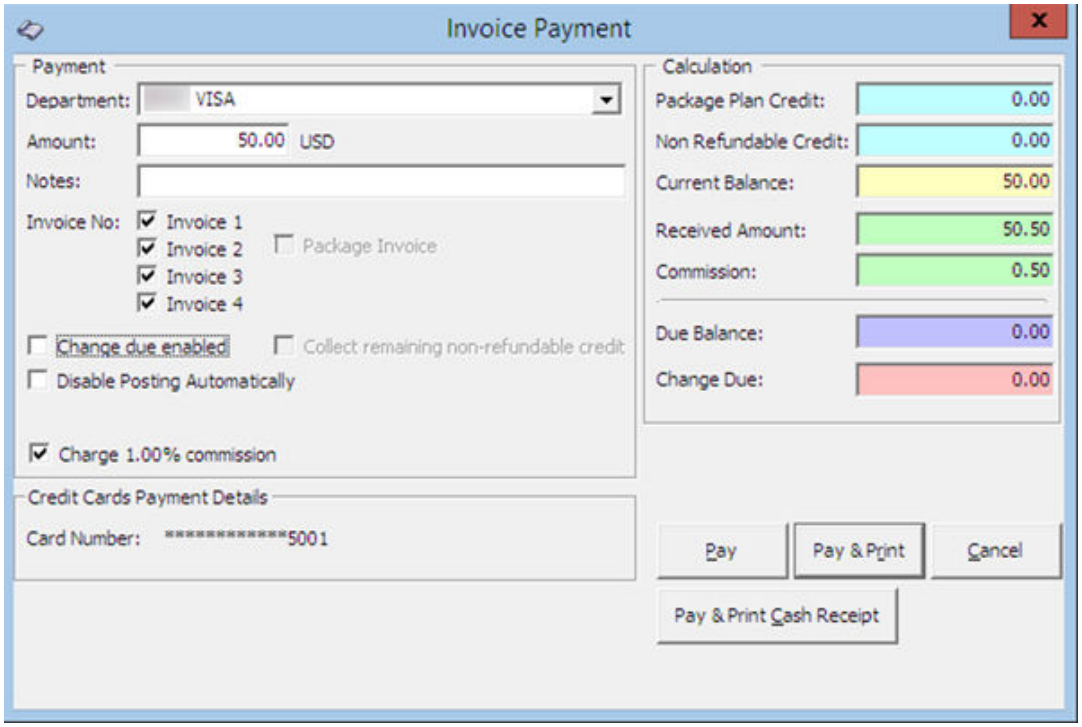


Payment by Credit Card

1. Retrieve the guest account from the Search panel, and then click **Pay Invoice** in the Guest Handling window.
2. An Invoice Payment form opens displaying the payment department defined during check in.
3. Select the **Payment department** from the drop-down list if it differs from the earlier payment method.
4. The amount is automatically filled based on the current outstanding balance of the selected invoice, for example: Invoice 1 balance =$30, Invoice 2 balance = $20. When all of the invoices are selected, the total becomes $50. Adjust the amount and select the invoice to pay *if they differ*.

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Figure 10-67 Credit Card Commission Selection



5. The % commission shown is according to the commission rate set up in Financial Department codes and is *selected* by default. The value of the commission chargeable is shown in the Commission field. If the commission is not applicable, deselect the commission checkbox.
6. Click **Pay** or **Pay & Print** to complete the transaction. If **Pay** is selected, be sure to print a copy of the invoice for guest reference.

Print Invoice

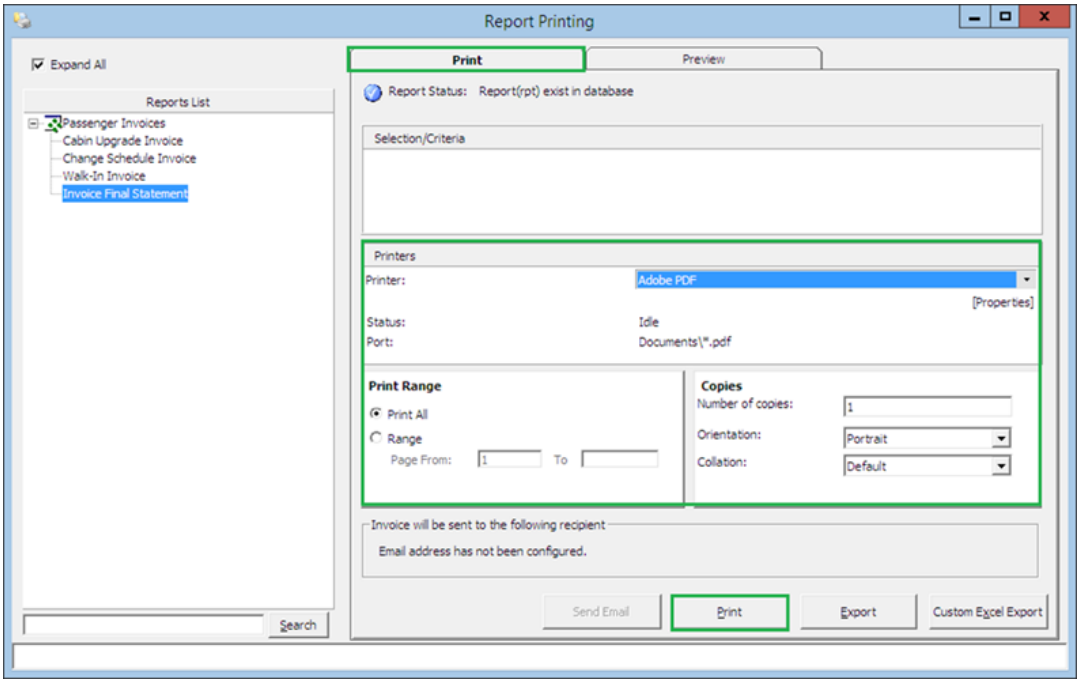
The Print Invoice function enables you to print invoices in a different layout made available by the Ship. It has a preview function that allows you to view an invoice/statement prior to printing a hard copy invoice.

Printing an Invoice

1. Retrieve the reservation from the Search panel and then click **Print Invoice** under Guest Info tab to open the **Passengers Invoice** window.
2. Select the invoice report to print from the Report List.
3. In the Print tab, select the printer, print range, and copies to print.
4. Click **Print** to send the print job to the printer.

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Figure 10-68 Print Invoice Window



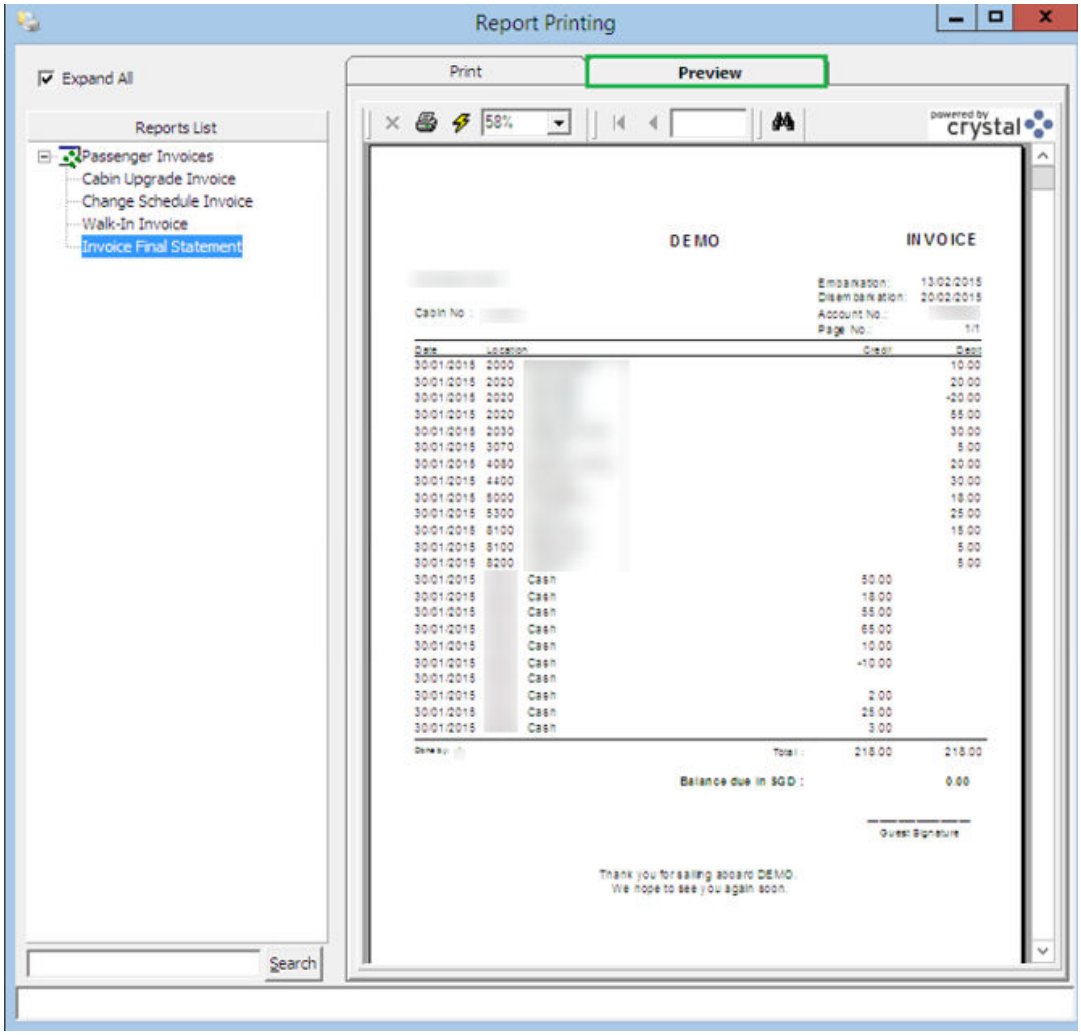
Preview Invoice

This function enables you to preview the invoice prior to sending the job to a printer.

1. Repeat steps 1 and 2 from Print invoice.
2. Navigate to the Preview tab to view the invoice.
3. Click the **Printer icon** to send the print job to the printer.

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Figure 10-69 Preview Invoice



Emailing an Invoice

In a paperless environment, you can send a copy of the invoice to the guest's email account only when on-board email is listed in the guest account. A special setup is required before an invoice can be sent out by email. Such entry requires setup by your System Administrator.

1. Repeat step 1 and 2 from the Print Invoice section above.
2. In the Print tab, click the **Send Email** button. You will receive a confirmation prompt once the emailis successfully sent.
3. Click **OK** to close the function.

Exporting an Invoice

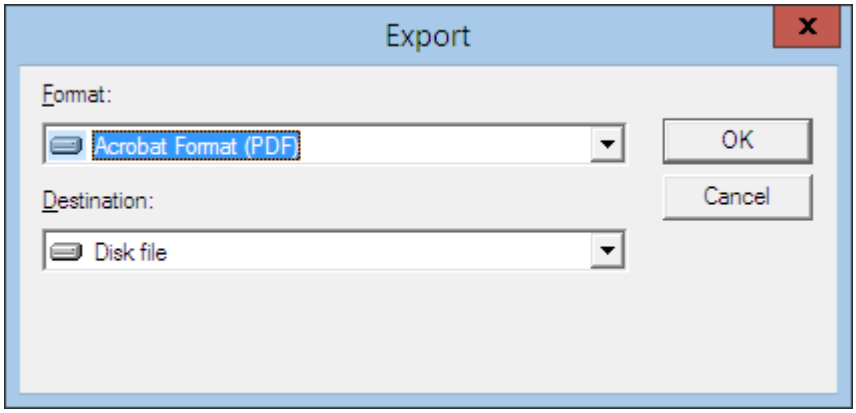
The system allows you to export invoices to a different file format. The supported file formats are: Acrobat Format, Crystal Report, MS Word, MS Excel, and others.

1. Repeat steps 1 and 2 of Print Invoice.
2. In the Print tab, press **Export**.

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3. Select the file format and destination type from the drop-down list when prompt.

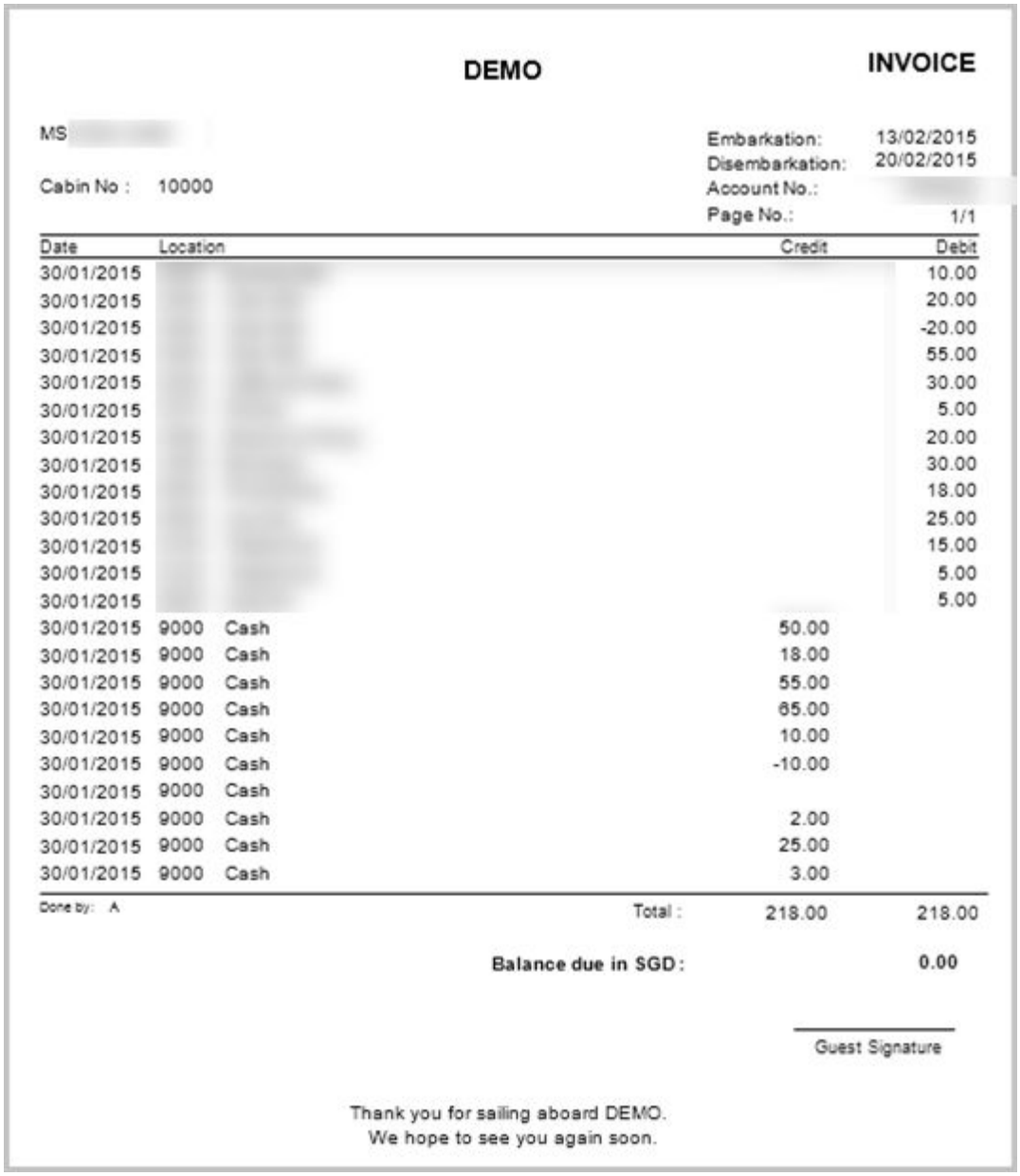
Figure 10-70 File Export Format Selection



4. Select the page range to print.
5. Enter the file name to save as when the system prompts for file saving location.

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Figure 10-71 Sample Invoice



DEMO

INVOICE

MS

Cabin No : 10000

Embarkation: 13/02/2015
Disembarkation: 20/02/2015
Account No.:
Page No.: 1/1

Date	Location		Credit	Debit
30/01/2015				10.00
30/01/2015				20.00
30/01/2015				-20.00
30/01/2015				55.00
30/01/2015				30.00
30/01/2015				5.00
30/01/2015				20.00
30/01/2015				30.00
30/01/2015				18.00
30/01/2015				25.00
30/01/2015				15.00
30/01/2015				5.00
30/01/2015				5.00
30/01/2015	9000	Cash	50.00	
30/01/2015	9000	Cash	18.00	
30/01/2015	9000	Cash	55.00	
30/01/2015	9000	Cash	65.00	
30/01/2015	9000	Cash	10.00	
30/01/2015	9000	Cash	-10.00	
30/01/2015	9000	Cash		
30/01/2015	9000	Cash	2.00	
30/01/2015	9000	Cash	25.00	
30/01/2015	9000	Cash	3.00	
Done by: A		Total :	218.00	218.00

Balance due in SGD : 0.00

Guest Signature

Thank you for sailing aboard DEMO.
We hope to see you again soon.

Custom Excel Export

This function exports the invoice into a predefined Excel format.

1. Repeat step 1 and 2 from the Print Invoice section above.
2. In the Print tab, click **Custom Excel Export**.
3. Enter the file name to save when the system prompts for a file saving location.

Move & Route

The Move and Route function enables bills to be organized at the time of credit sign up during the cruise or at the end of the cruise when a guest would like to separate certain charges from

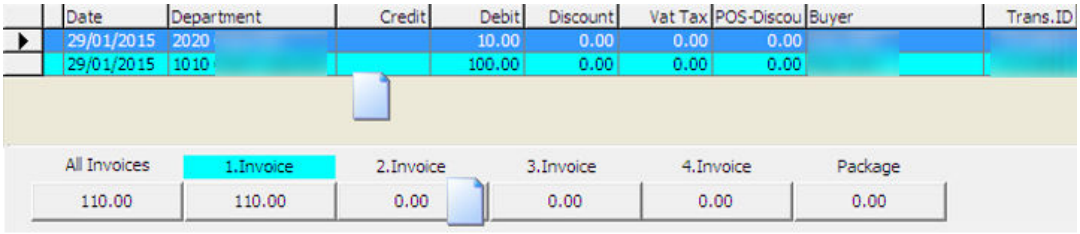
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the main invoice. Charges are easily moved using the drag and drop movement and various methods are available to suit the operational needs.

Moving a charge from one invoice to another

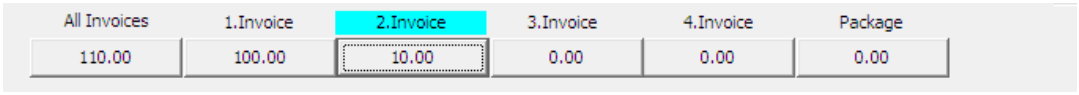
1. Select the **guest account** and navigate to the Invoice tab.
2. Select the transaction to move.
3. Press, and hold down the left mouse click.
4. Drag the transaction to the location by moving the mouse pointer.
5. Drop the object by releasing the left mouse click.

Figure 10-72 Move & Route Function



6. The original invoice amount will decrease and the newly created invoice amount increases.

Figure 10-73 Differences



Setting Up Charge Route

The following function allows guests to separate certain charges in another invoice throughout the cruise or route them to another account. It is more feasible to set up routing instructions to move both current and future postings to a new invoice.

1. Select the **guest account** and navigate to the Invoice tab.
2. Click **Move & Route** to open a Move posting menu.

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Figure 10-74 Move Posting Tab

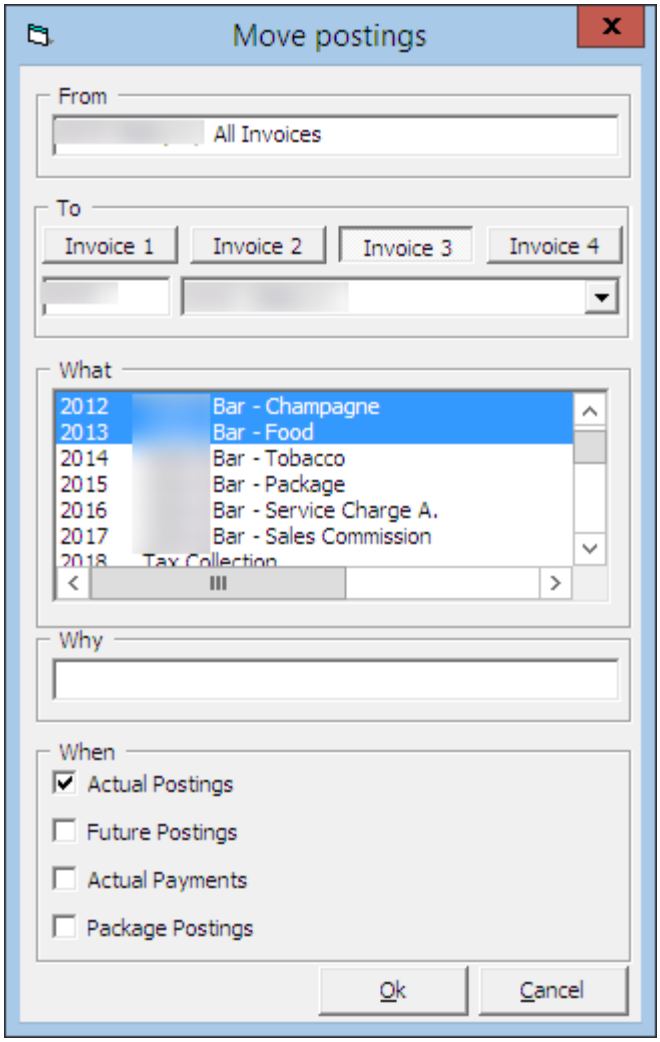


Table 10-20 Definition of Move Posting Tab

Field	Description
From	Default to Guest account, All Invoices.
To	Selectable invoice from Invoice 1 to 4 or another guest/payer account.
What	Department Group or Financial Department code to route.
Why	The reason why charges were routed.
When	Type of postings to route.

3. By default, the system displays All Invoices as the main invoice. Select the **invoice** where the charges are routed to.
4. If changes are routed to another group/payer, enter the **cabin number** and select the **guest name**.
5. Select either the department group or financial department code to route and the reason in the **Why** field.

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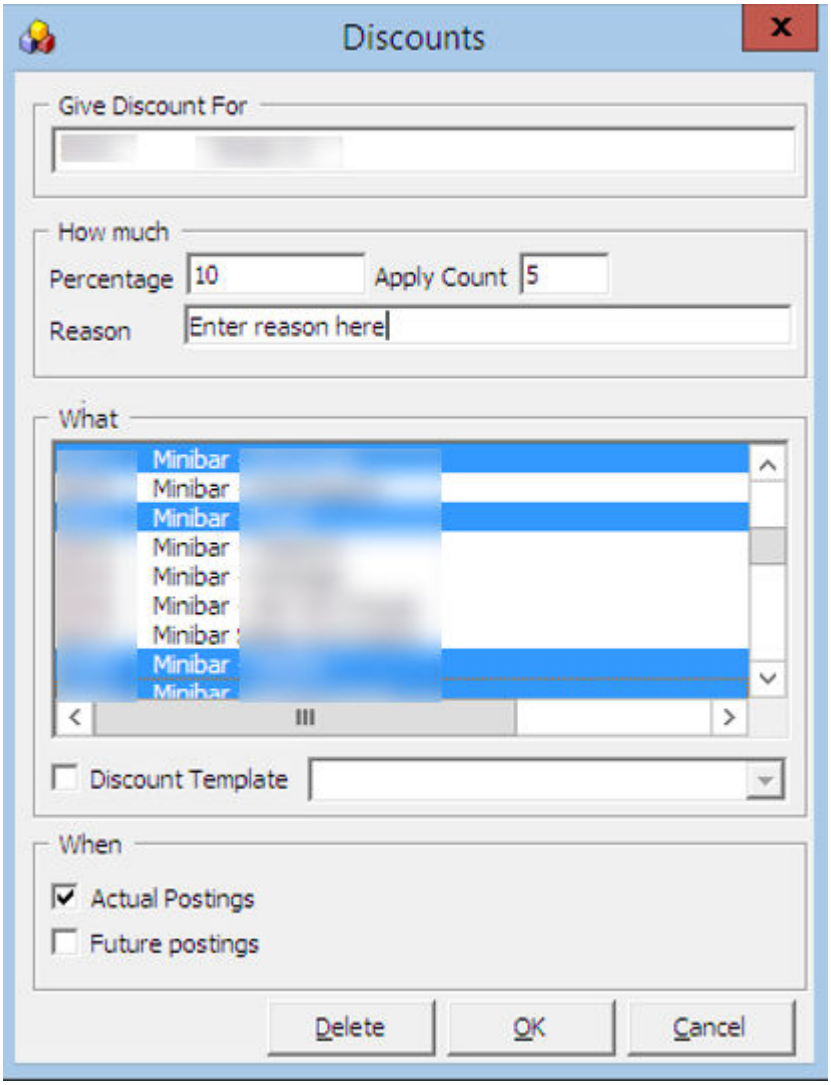
6. Select the type of posting to route, actual/future postings or actual payments.
7. If **Future Postings** is selected, the system automatically places the department code in the Disc, Route, Pkg tab, Routing window. See also Disc, Route, Pkg section for more information.

Criteria Discount

The following feature works the same as the Percentage Discount feature in the Disc, Route, Pkg tab and has an additional checkbox for Actual Postings. The functionality creates a record in the discount portion of the Disc, Route, Pkg tab when Future Posting is selected.

1. Select the account and navigate to the Invoice tab.
2. Click **Criteria Discounts** to open a dialog box.
3. Enter the **Percentage value** and the number of counts in the **Apply Count** field if the discount is accorded an X number of times. For example, enter 1 to specify a one-time discount for every selected department code or leave as blank for unlimited discounts given for every selected department.

Figure 10-75 Criteria Discounts Window



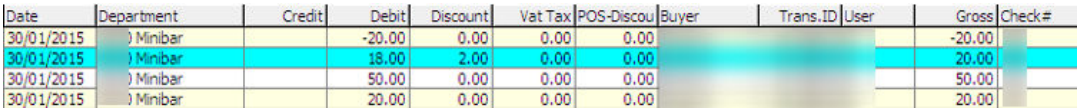
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4. Select the **Financial Department** entitled to discount.
5. Select either the **Actual** checkbox or the **Future Postings** checkbox and, click **OK** to save.

> **Warning**
>
> Once a discount is posted to an actual posting, it *cannot be reversed*. If the discount has a count indicator, the system then posts the discount until it reaches the indicated count, and no further discounts are accorded thereafter.

6. The system then posts an adjustment (reverse) against the original posting and sets the adjusted posting to **No Print** automatically and, reposts the correct value with the discount indicated.

Figure 10-76 Example of Criteria Discount



Date	Department	Credit	Debit	Discount	Vat Tax	POS-Discou	Buyer	Trans.ID	User	Gross	Check#
30/01/2015	) Minibar		-20.00	0.00	0.00	0.00				-20.00	
30/01/2015	) Minibar		18.00	2.00	0.00	0.00				20.00	
30/01/2015	) Minibar		50.00	0.00	0.00	0.00				50.00	
30/01/2015	) Minibar		20.00	0.00	0.00	0.00				20.00	

See also Disc, Route, Pkg.

Item Discount

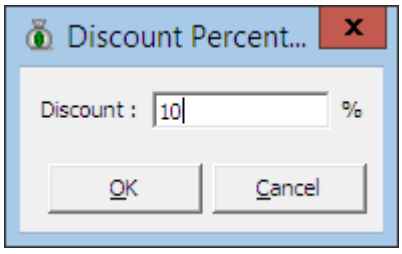
The Item Discount is a feature that deducts a specific percentage of selected postings from the guest invoice.

> **Note**
>
> This is a Percentage discount and not available as a Value discount.

According an Item Discount

1. In the Invoice tab, mark the posting entitled to the discounted and then click the **Item Discounts** button.

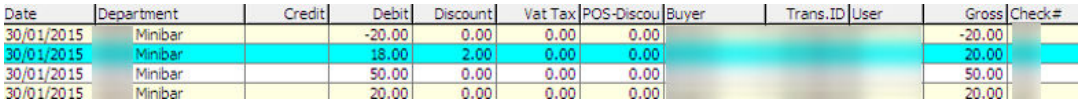
Figure 10-77 Item Discount



2. Insert the value as a percentage in the **Discount** field, and click **OK**.
3. The system posts an adjustment (reverse) against the original posting and setshe adjusted posting to **No Print** automatically. It then reposts the correct value with the discount value indicated.

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Figure 10-78 Example of Item Discount Transactions



Date	Department	Credit	Debit	Discount	Vat Tax	POS-Discou	Buyer	Trans.ID	User	Gross	Check#
30/01/2015	Minibar		-20.00	0.00	0.00	0.00				-20.00	
30/01/2015	Minibar		18.00	2.00	0.00	0.00				20.00	
30/01/2015	Minibar		50.00	0.00	0.00	0.00				50.00	
30/01/2015	Minibar		20.00	0.00	0.00	0.00				20.00	

Hide No Print

The Hide No Print feature works with transactions that are marked with **No Prints**, for example, voided transactions. The process changes the information displayed, giving you an organized invoice to view.

Hiding Transactions with No Prints

1. Click **Hide No Prints** to switch the button from Hide No Prints to Show No Prints.
2. Transactions marked with No Prints (shaded in pale yellow) are hidden from the invoice window until you click **Show No Prints**.

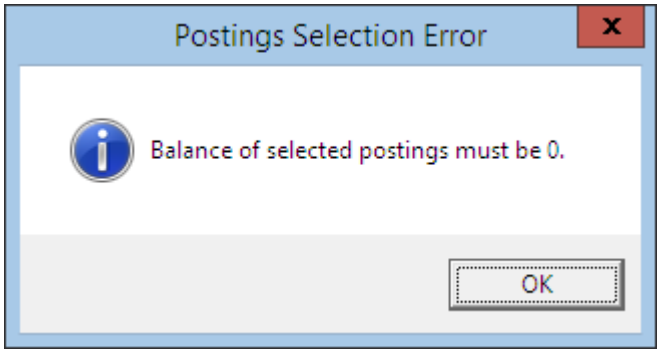
To Show No Prints Transactions

Click **Show No Prints** to switch the button from Show No Prints to Hide No Prints.

Transactions Marked with No Prints

Transactions marked with No Prints appear in the invoice window in pale yellow. This function enables you to hide the voided posting or previous settlements from being printed on the invoices. It is only possible to set No Prints for a transaction entry that equals 0.00.

Figure 10-79 No Print Posting Not Equal to 0



1. Retrieve the account and navigate to the Invoice tab.
2. Select the desire **transactions** and click **No Print**.
3. If the transaction balance does not equal 0.00, the system prompts an error message.

To Reset No Print Transactions to Original State

1. Select **No Print transactions** and click **No Print**.
2. Transactions revert to normal postings and are no longer shaded in pale yellow.

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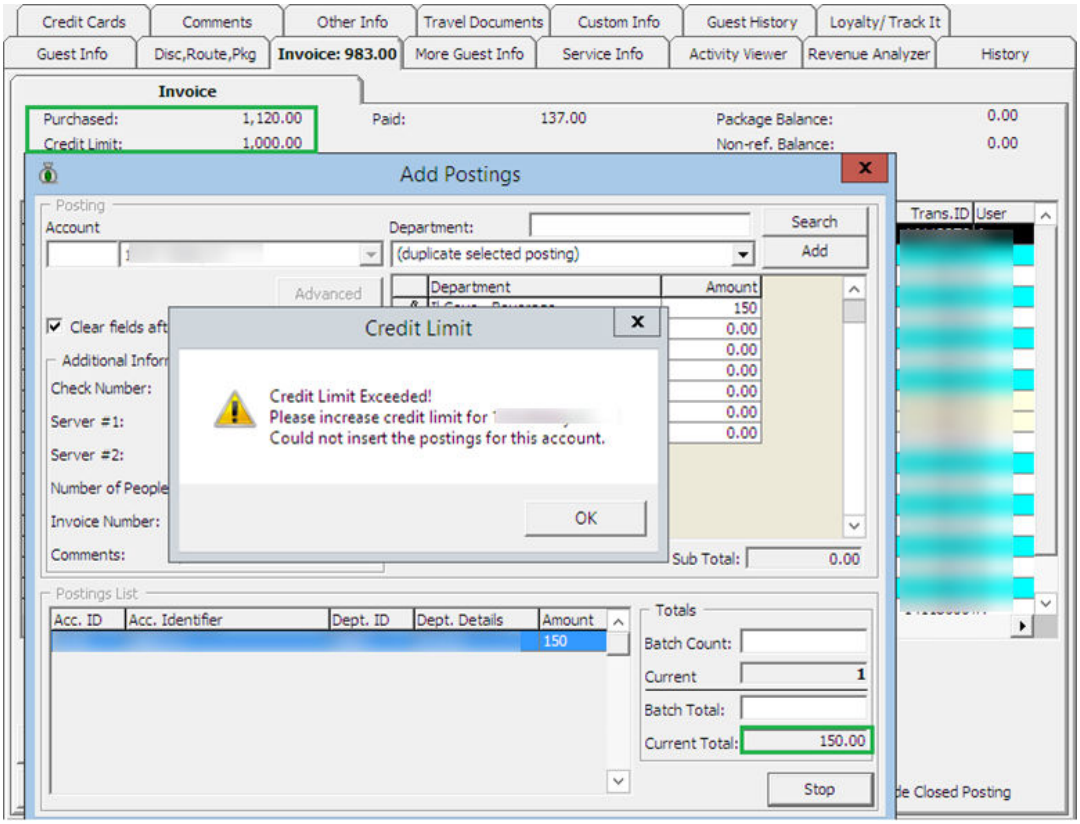
Set Credit Limit

The floor limit is pre-set within the Financial Credit Sub-Department code. This can be adjusted for specific guests at the discretion of the Chief Purser.

Set Credit Limit

1. In the Invoice tab, click the **Set Credit Limit** button.
2. Insert the credit value in the dialogue box, and click **OK** to override the pre-set credit limit defined in Credit Sub-Department code.
3. If the account exceeds the floor limit or the individual limit, a **Credit Limit Exceeded** warning prompt appears in both the Oracle Hospitality Cruise Shipboard Property Management System (SPMS) and POS System during posting, and charges will not be added.

Figure 10-80 Warning Prompt When Credit Limit Exceeded



> **Note**
>
> The same warning prompt appears if the account is routed and the payer has a Credit Limit defined.

4. Consult your Chief Purser or Front Desk Manager or refer to the Ship's Operating procedure for the next course of action.

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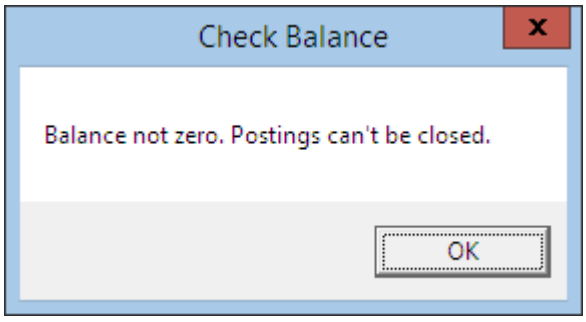
Close Posting

The Close Posting function generates an interim invoice and closes the balanced account without checking out the account. This function *does not work* when the account still has a balance.

> **Warning**
>
> Once the account is closed, this **Can Not Be Undone.**

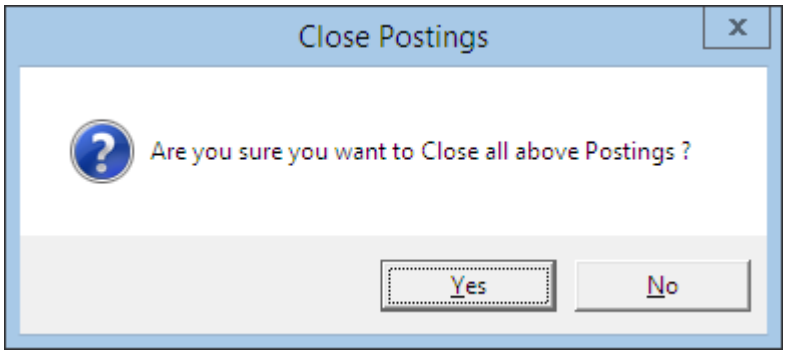
1. Retrieve the account and navigate to the Invoice tab.
2. Ensure all invoices are 0.00 balance. If the account is unbalanced, the system prompts a **Balance not zero** message.

Figure 10-81 Balance Not 0.00 in Close Posting



3. Click the **Close Postings** button.
4. Select **Yes** when the system prompts for a response. if **No** is selected, it will return to Invoice tab *without* closing the postings.

Figure 10-82 Close Posting Confirmation



5. Check **Hide Posting** on the invoice tab to hide all closed postings.

Set Spending Limit

The Set Spending Limit functionality limits the buyer spending value and is only enabled when an account is routed to another account, for example: Mr X is paying for Mr Y and would like to

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limit the spending of Mr Y to $500. The Set Spending Limit is enabled in Mr. Y's account and not Mr. X's account.

> **Warning**
>
> Once the account is closed, this **Can Not Be Undone**.

Set Spending Limit

1. Retrieve the guest account and navigate to the Invoice tab.
2. The Set Spending Limit is enabled when routing is present in the account.
3. Click **Set Spending Limit** to open a dialogue window.

Figure 10-83 Set Spending Limit Options

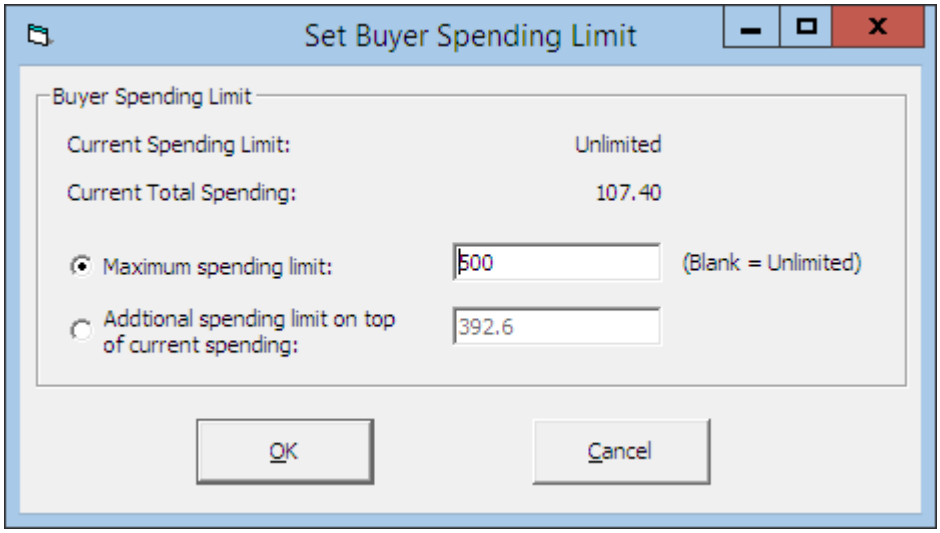


Table 10-21 Options Available in Set Buyer Spending Limit

Field	Description
Maximum Spending Limit	The maximum value allowed to spend.
Additional Spending Limit on top of current Spending	Additional value to top up the limit. For example: Current spending is $107.40 and the intended limit is $500. The value to insert is $392.60.

4. Insert the spending limit in one of the available options and, click **OK**. The guest credit limit in the Invoice tab will update with the new information.

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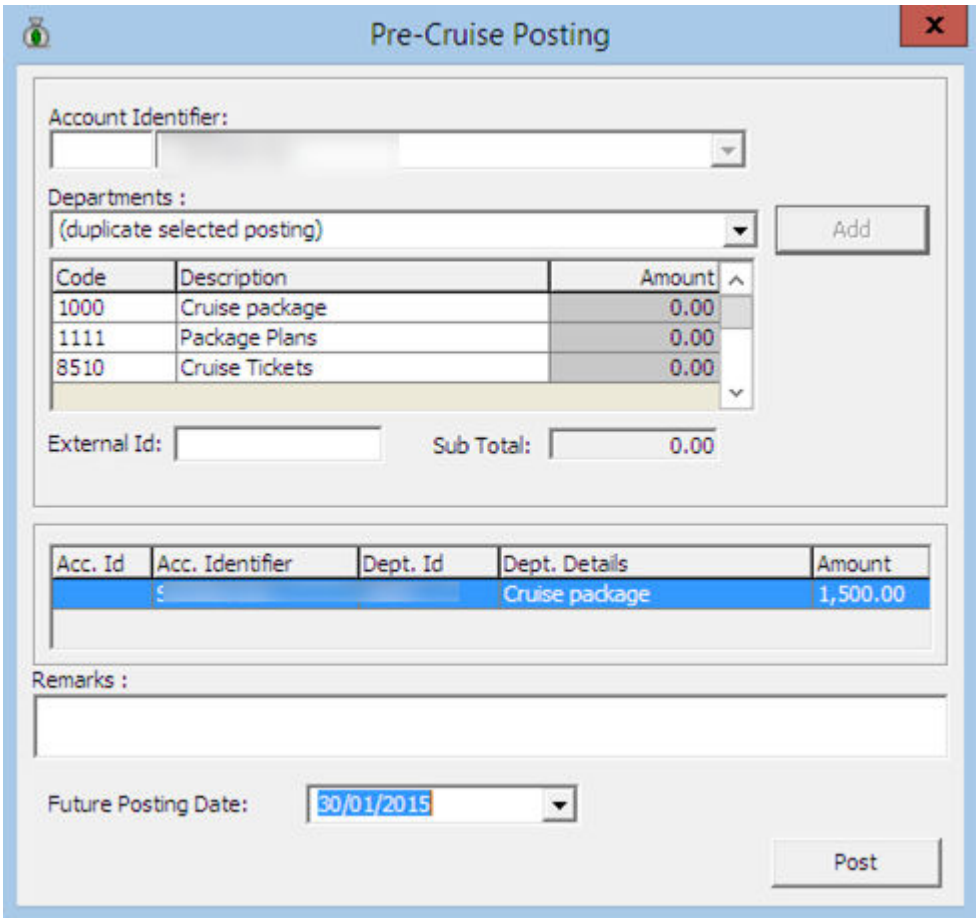
Show Pre-Cruise Invoice

A Pre-Cruise Invoice allows you to prepare an advance invoice for the guest. Postings and payments posted in the Pre-Cruise Invoice function are not actual revenue until they are posted to a checked-in account.

Creating a Pre-Cruise Invoice

1. Retrieve an Expected guest reservation from the Search panel.
2. In the Guest Handling window, click **Add Posting (Pre-Cruise)** to open the Pre-Cruise Posting window.

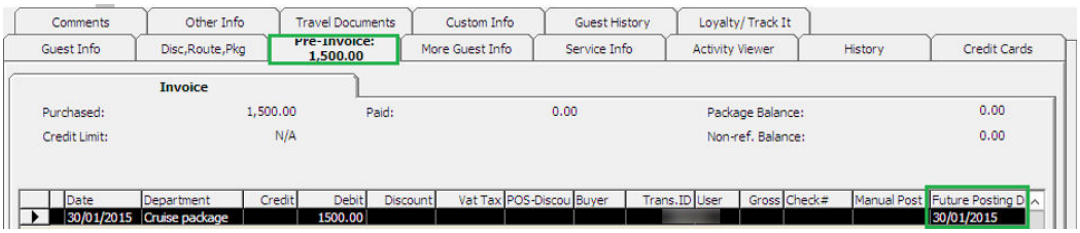
Figure 10-84 Pre-Cruise Posting Window



3. Select the **Financial Department** to post and then click **Add**.
4. Insert remarks pertaining to this posting, if any.
5. In the Future Posting Date field, select the **date** to post to.
6. Click **Post** to complete the pre-cruise invoice with the earlier added postings in the **Pre-Invoice** window.

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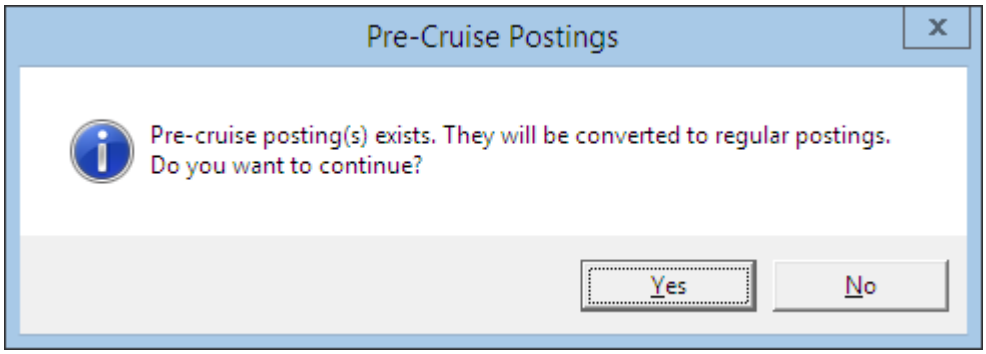
Figure 10-85 Sample Pre-Cruise Transactions



Converting a Pre-Cruise Invoice into Actual Posting

1. At the point of check-in, the system prompts you to convert the pre-cruise postings into regular postings.

Figure 10-86 Pre-Cruise Postings



2. Select **Yes** to convert the postings.
3. A **Show Pre-Cruise Invoice** is not added.
4. Click the **Show Pre-Cruise Invoice** to toggle between guest invoice and pre-cruise invoice window, if there are future postings. When toggling, the button will change to **Show Invoice** or vice versa.

> **Note**
>
> When the Show Pre-Cruise Invoice is clicked, the Add Posting will change to Add Posting (Pre-Cruise), enabling you to perform pre-cruise posting and apply the payment to a future posting date.

5. Once all of the pre-cruise postings are posted, the Show Pre-Cruise is automatically disabled.

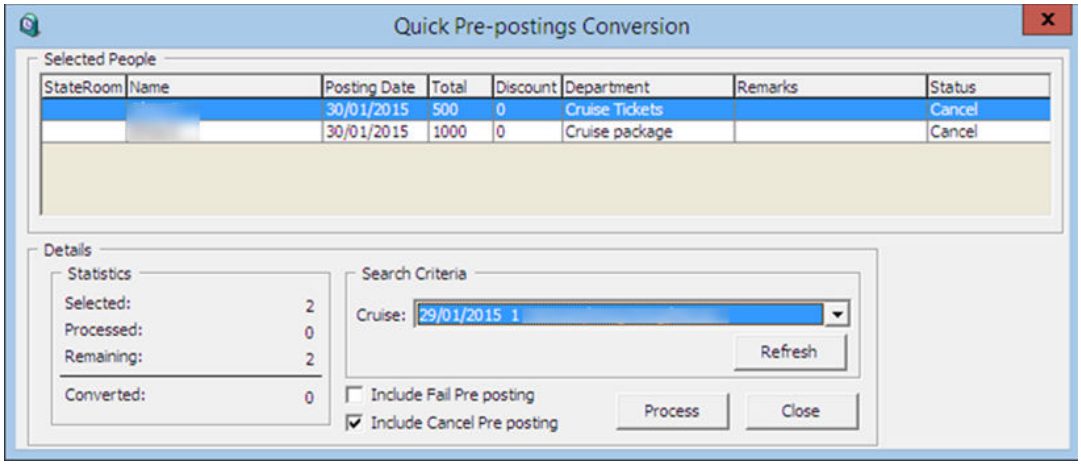
Undoing Non-Converted Pre-Cruise Posting

When you accidentally click **No** at the prompt to convert pre-cruise postings to regular postings, these postings are stored in **Quick Pre-Posting Conversion** function, allowing you to repost all the pre-posting.

1. In the Cashier menu, select **Quick Pre-Posting Conversion** from the drop-down list.

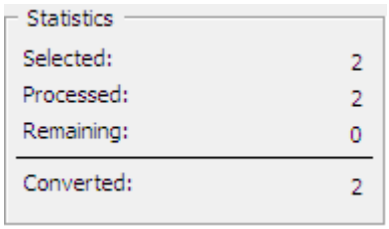
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Figure 10-87 Quick Pre-Posting Conversion



2. A list posting failed to convert is displayed in the Selected People grid.
3. In the Search Criteria drop-down list, select the **Cruise** and then click **Process**.
4. Click **Yes** on the Quick Prepostings Conversion prompt to post all of the pre-cruise postings, and then click **OK** on a number of pre-postings to post when prompt.
5. The Statistic section shows the number of selected, processed, remaining, and converted posting(s).

Figure 10-88 Statistics



More Guest Info Tab

The More Guest Info tab stores various information such as Billing Address, Travel Agency Contact, Cruise Reservation Related Information, Guest Picture, and Document Return status. Most of all fields in the Billing Address, Travel Agency, and Product Details section are editable with an *in-line edit function* by simply clicking on the field name and inserting text. Editing other sections such as Take Picture, Edit Cruise Fare, and Document Return would require you to click on the available buttons.

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Figure 10-89 More Info Tab

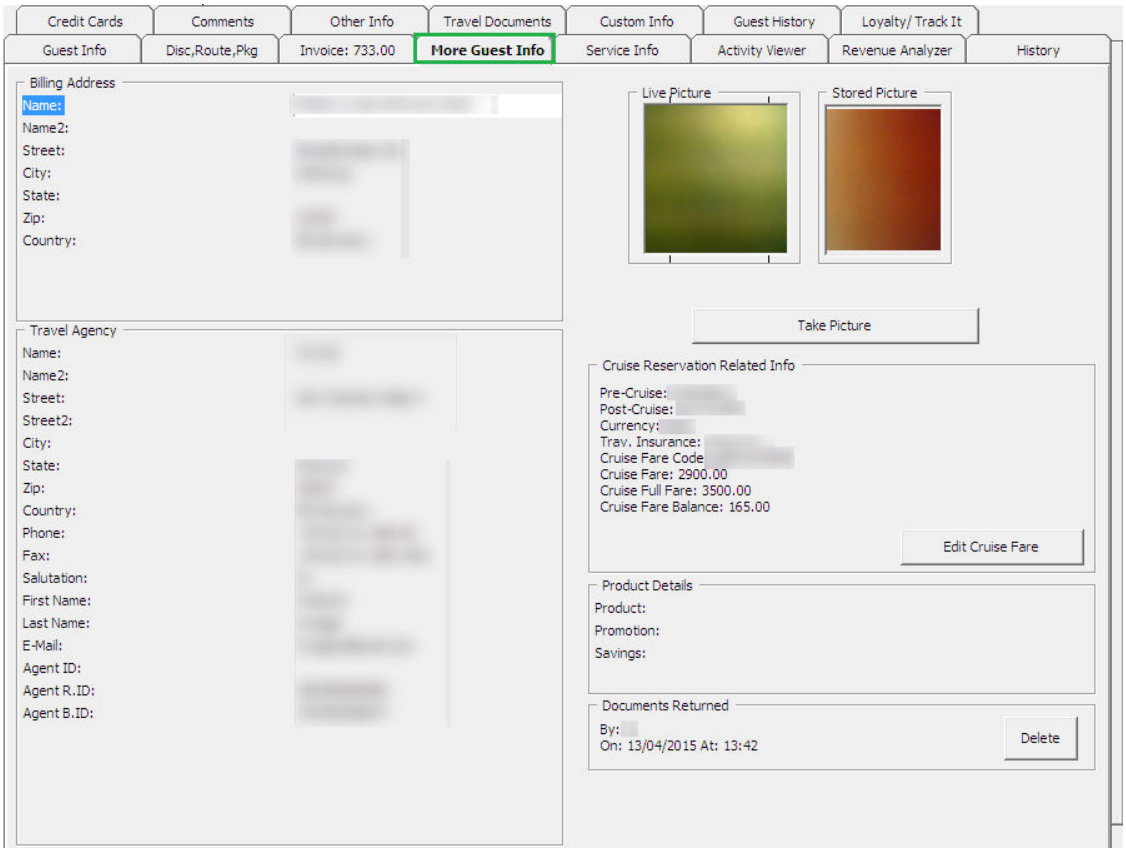


Table 10-22 Field Definition of More Info Tab

Field	Description
Name	Billing Name.
Street	Billing Address.
City	City of Billing Address.
Zip	Zip of Billing Address.
State	State of Billing Address.
Country	Country of Billing Address.

Table 10-23 Field Definition of More Info Tab (Travel Agency)

Field	Description
Travel Agency	
Name	Travel Agency Name.
Street	Street Address of Agency.
City	City.
State	State.
Zip	Zip Code.

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Table 10-23 (Cont.) Field Definition of More Info Tab (Travel Agency)

Field	Description
Country	Country.
Phone	Phone number of Travel Agency.
Fax	Fax number of Travel Agency.
Salutation	Salutation of contact person.
First Name	First name of contact person.
Last Name	Last name of contact person.
E-Mail	E-mail address of contact.
AgentID	Agency ID.
Agent R.ID:	Additional Agency ID.
Agent B.ID	Additional Agency ID.

Table 10-24 Field Definition of More Info Tab (Take Picture)

Field	Description
Take Picture	
Live Picture	Live view of the guest before picture were taken.
Stored Picture	Picture saved using Live Picture function.

Table 10-25 Field Definition of More Info Tab (Cruise Reservation Related Info)

Field	Description
Cruise Reservation Related Info	
Pre Cruise	Pre-Cruise arrangement. Information imported from DGS.
Post Cruise	Post-Cruise arrangement. Information imported from DGS.
Currency	Cruise Fare Currency. Information imported from DGS.
Trav. Insurance	Travel Insurance number. Information imported from DGS.
Cruise Fare Code	Fare code from the reservation system. Information imported from DGS.
Cruise Fare	Cruise Fare. Information imported from DGS.
Cruise Full Fare	Full Cruise Fare. Information imported from DGS.
Edit Cruise Fare	Function to edit cruise fare balance. User right dependent.

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Table 10-26 Field Definition of More Info Tab (Product Details)

Field	Description
Product Details	
Product	Product code linked to the booking.
Promotion	Promotion code linked to the booking.
Savings	Discount code linked to the booking.

Table 10-27 Field Definition of More Info tab (Return Documents)

Field	Description
Return Documents	
Documents are not returned	Indicate the date/time and user who returned the guest travel document.

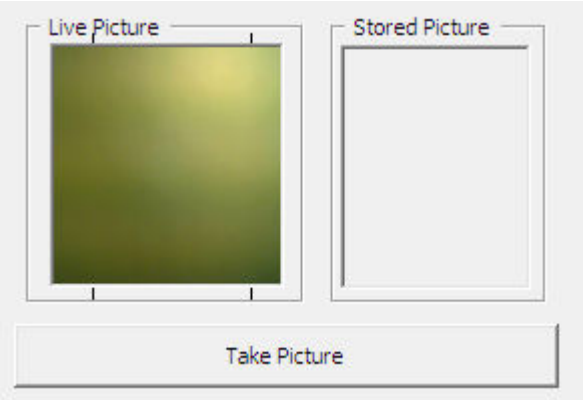
Take Picture

The Take Picture option captures the current guest picture and shares them across other modules enabling other users to easily recognize the guest they are dealing with. The supported picture file formats are *.jpg* or *.bmp*.

Taking Guest Picture

1. Retrieve the account and navigate to the More Info tab.
2. The live image of the guest appears in the **Live Picture** window.
3. Click the **Take Picture** button to capture the image.

Figure 10-90 Take Picture



Cruise Reservation Related Info

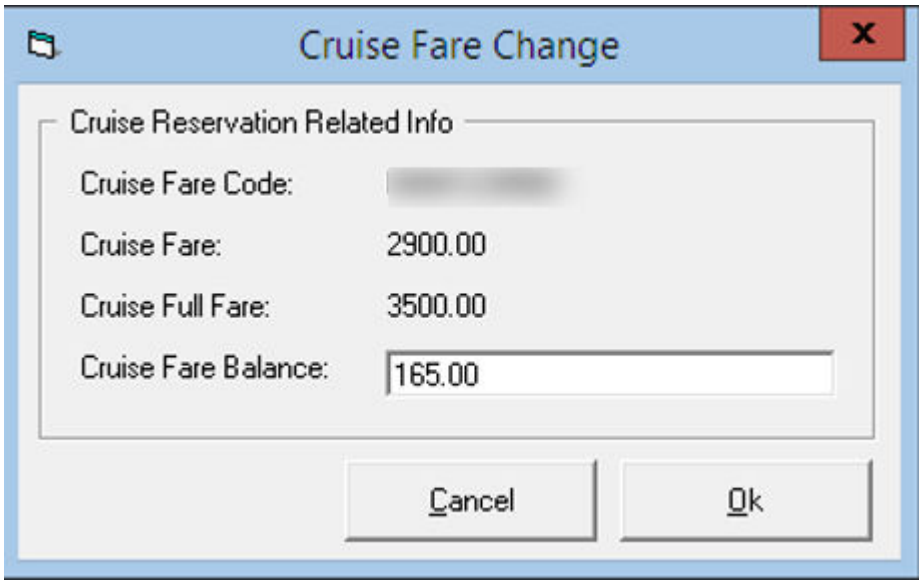
The Cruise Reservation Related Info section displays the cruise price paid in the Reservation system. The data is imported from DGS ResOnline. The fields are non editable, except for the Cruise Fare Balance, and it is dependent on User Access Rights #4461.

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Editing Cruise Fare

1. In the More Info tab, click **Edit Cruise Fare**.
2. Edit the Cruise Fare Balance and then click **OK** to save.

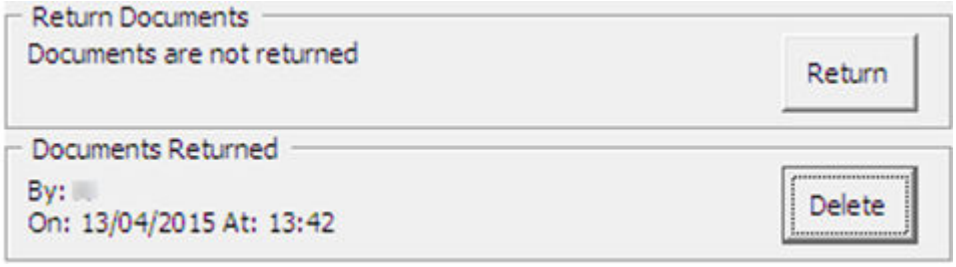
Figure 10-91 Edit Cruise Fare



Document Return

The Document Return section stores the date, time and user who returned the travel documents to the guest from the **Document Return** module.

Figure 10-92 Document Return in More Guest Info



1. In the More Info tab, click **Delete** to reset the document status.
2. This changes the button display to **Return** and status of the document as “Documents are not returned.”

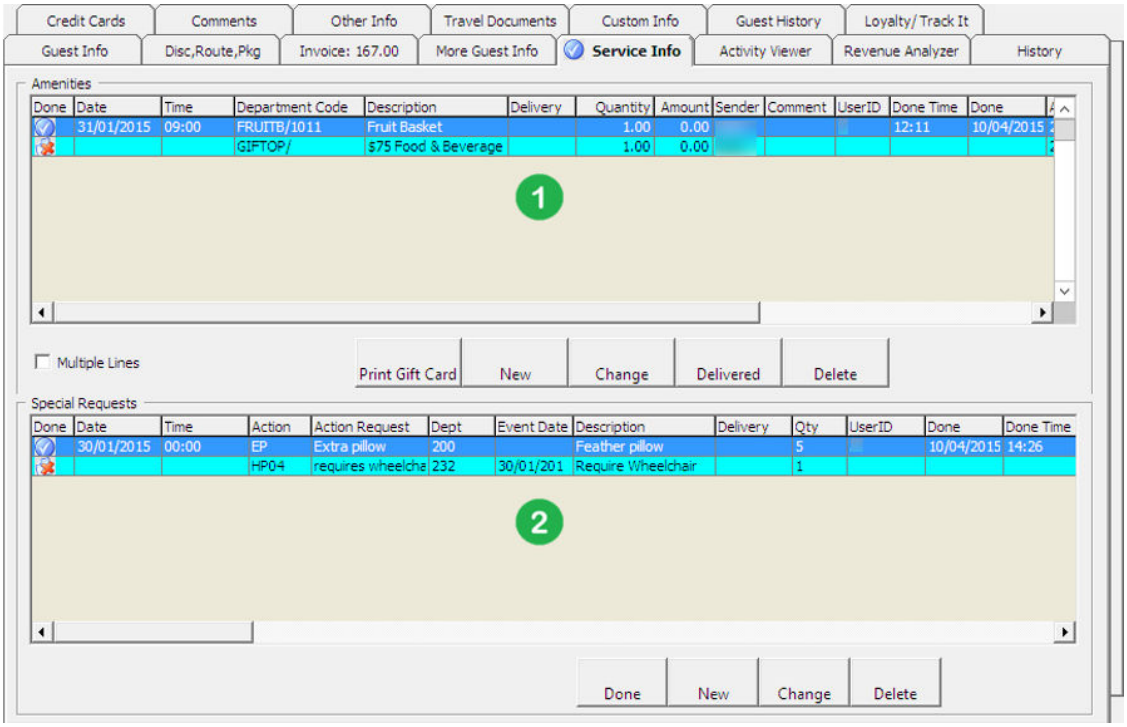
Service Info Tab

The Service Info function in Guest Handling window stores the type of service, amenities package, or special requests rendered by the ship without having to rely on the large manifest

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for information. The packages and requests arranged by the cruise company prior to the actual sail date are also included in the reservation information during the periodic import. Although the information is mainly updated through reservations import file, manual update is possible when needed. Besides listing these requests under individual guest records, a summary of such information is populated in the Amenities Overview function, allowing the responsible parties on board such as Manager, Chief Steward, and Hostess/Group Coordinator access and ensuring requests are fulfilled.

Figure 10-93 Guest Handling — Service Information Tab



The window is divided into two sections:

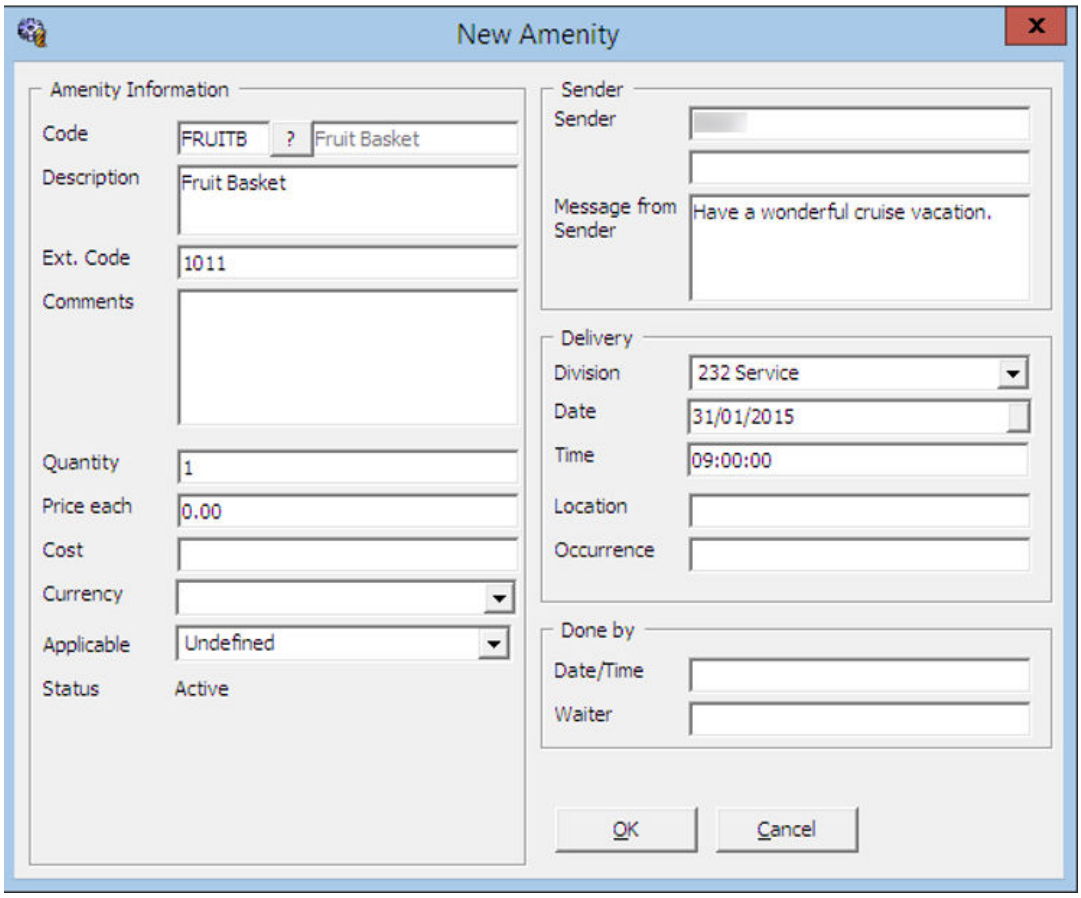
1. One section contains details of pre-planned company packages or any amenities to be accorded during the cruise.
2. The other section contains all of the Special Requests for a passenger with special needs.

Setting Up an Amenity / Special Request

1. Retrieve the account and navigate to the Service Info tab.
2. Click the **New** button under the Amenity/Special Request section to open a dialog box and then fill in all of the required information.

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Figure 10-94 Amenity Information Form



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Figure 10-95 Special Request Form

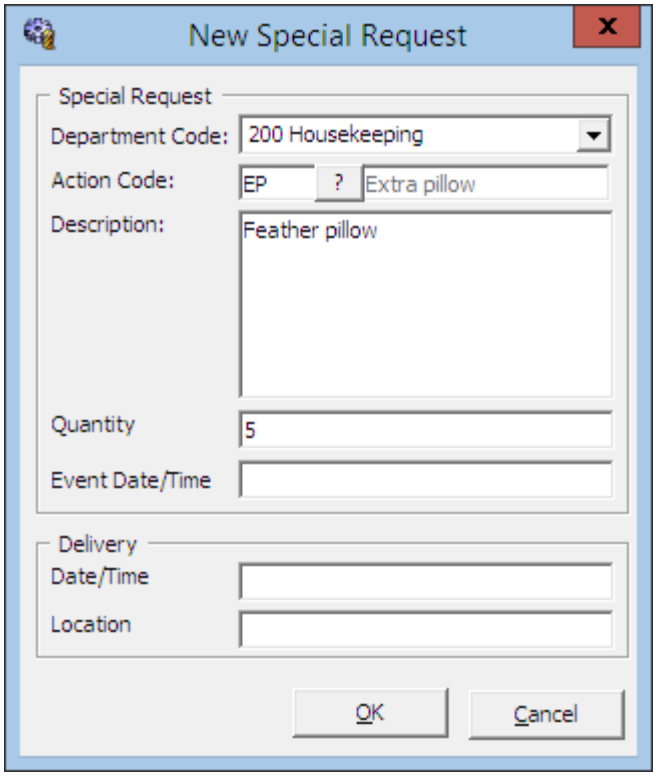


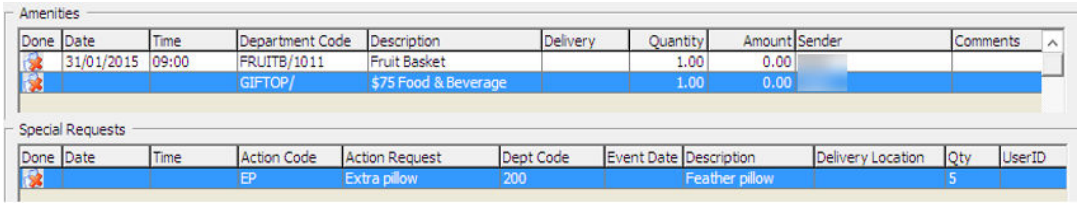
Table 10-28 Field Definition of Amenity / Special Request Form

Field	Description
Code / Action Code	Short Amenity /Special Request Code.
Description	Description of the code.
Ext. Code	External brochure/reference code.
Comments	Additional comments pertaining to this amenity.
Quantity	Required quantity.
Price each	Unit price of amenity.
Code / Action Code	Short Amenity /Special Request Code.
Description	Description of the code.
Ext. Code	External brochure/reference code.
Comments	Additional comments pertaining to this amenity.
Quantity	Required quantity.
Price each	Unit price of amenity.
Code / Action Code	Short Amenity /Special Request Code.
Description	Description of the code.
Ext. Code	External brochure/reference code.

3. Click **OK** to save, which adds the items into the Amenities/Special Request section and a Red X envelope icon under the Done column.

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Figure 10-96 Amenities / Special Request items

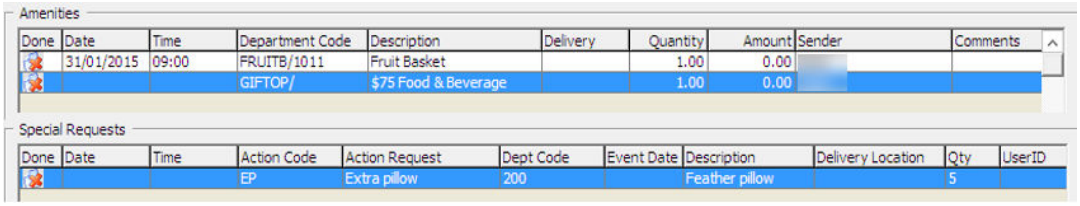


4. A Check Mark icon is placed on the Service Info tab as an alert that there are entries needing follow-up.

Marking Items as Delivered

1. Select the **item** from the Amenity/Special Request section and then click **Delivered**.
2. The system then replaces the Red X envelope with a check mark in the Done column with the Date/Time and User who completed the task shown.

Figure 10-97 Amenities/Special Request Delivered Items



3. Click **OK** to save, which adds the items to the Special Requests section and a Red X envelope under the Done column
4. The system places a check mark on the Service Info tab as an alert that there are entries needing follow-up.

Activity Viewer Tab

The Activity Viewer tab provides a quick view of the activities signed up by the guest, be it Excursion, Dining arrangements or Spa booking, thus enabling them to locate the guest or follow up on up-coming activities. The information displayed is controlled by two parameters. Contact Support/Consultant for the supported template setup/usage.

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Figure 10-98 Activity Viewer Window

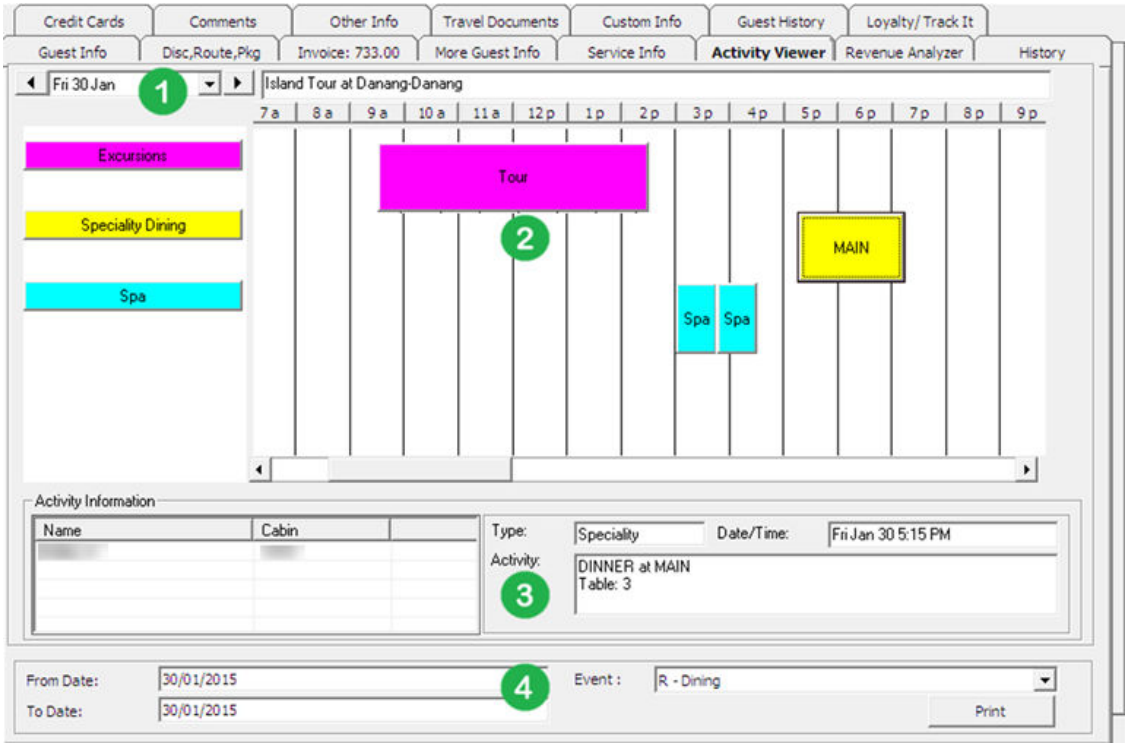
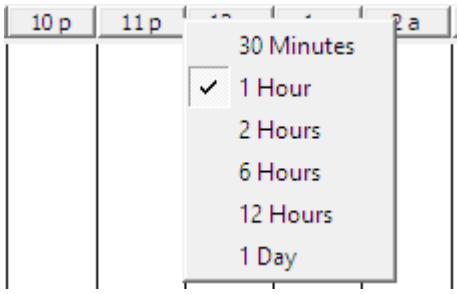


Table 10-29 Activity Window

Field	Description
1	Date/Time grid of activity window.
2	Type and scheduled time of activities.
3	Details of selected activity.
4	Date/Time of event filter for Itinerary print out.

By default, the time grid is set to an hourly grid and can be easily changed by right-clicking on the time grid and selecting the desired time frame to display.

Figure 10-99 Changing Time Frame



The activity time in the grid is indicated according to the color defined for each type of activity.

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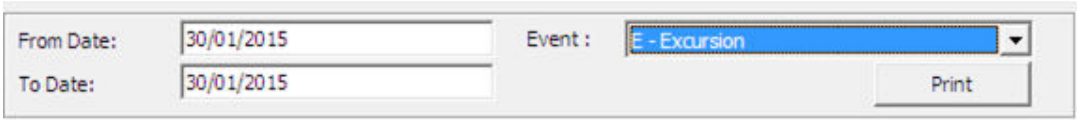
Navigating Through Activity Viewer

1. On the date field, select either the date to display using the down arrow key, or use the arrow left/right to navigate to the previous or next day view.
2. Use the scroll bar to navigate to the previous or future time period.
3. Clicking the activity bar in the grid view further displays information such as passenger name of the selected cabin, activity type, activity date and time of a selected event outlet or table reservation in the Activity Information section.
4. An itinerary can be printed from the same window. A report configuration under a report group Itinerary is required prior to printing an itinerary. See the *Administration – Reports Setup* section for report configuration steps.

Printing an Itinerary

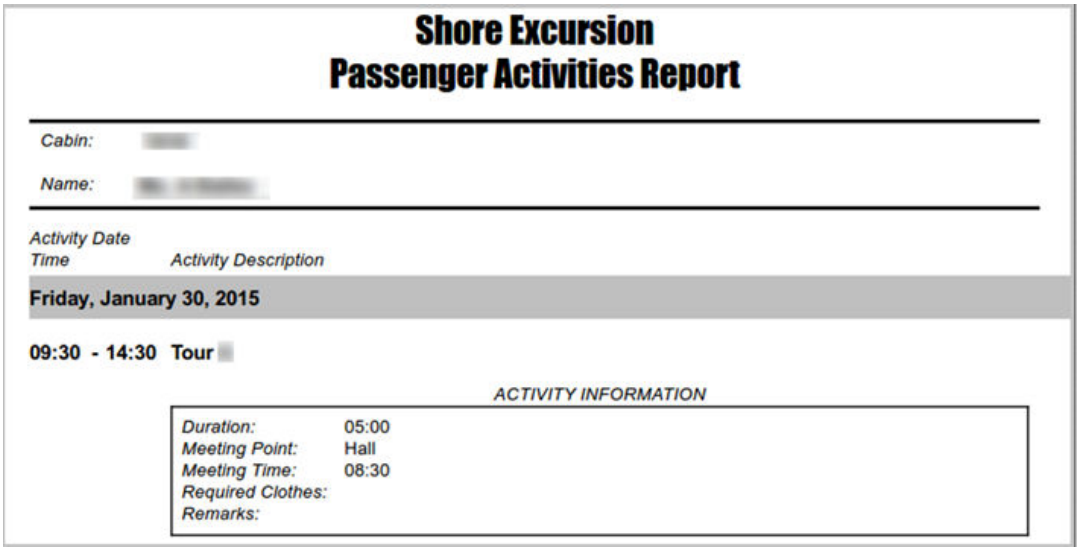
1. In the Date/Time filter option, enter the activity date range to print.

Figure 10-100 Activity Date Range



2. Select the type of event from the drop-down list.
3. Click **Print** to generate the Itinerary.

Figure 10-101 Sample Excursion Itinerary



Revenue Analyzer Tab

The Revenue Analyzer provides a revenue analysis of selected guests by date, department and transaction number order. It comprises two tabs - Department Details and Item Details. By default, information displayed on the window is imploded and only the transaction date, net

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total and gross total are shown. In order to view detailed information, place a check mark in **Expand All** or manually click the **'+/-'** key to show/hide the column, or click the **arrow down** on the drop-down list to further expand the information of respective column.

Figure 10-102 Revenue Analyzer Tab

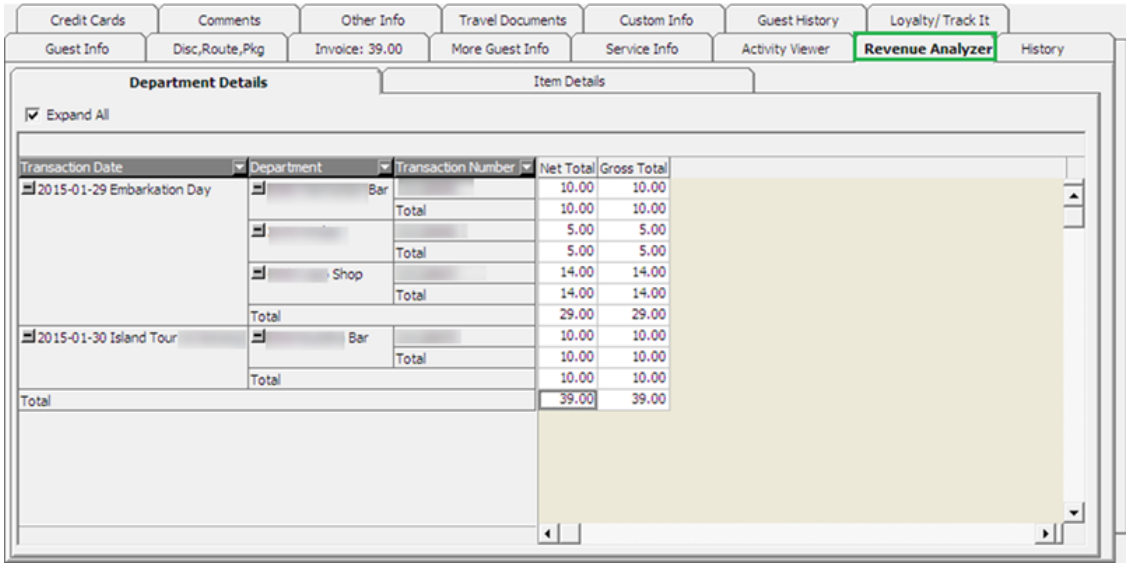


Table 10-30 Field Definition of Revenue Analyzer

Field	Description
Transaction Date	Date transaction was posted.
Department	Financial Department.
Transaction Number	System generated transaction ID.
Total	Sub-total of each Financial Department.
Net Total	Total Net amount (Total value excluding discount).
Gross Total	Gross amount (Total value before discount).

History Tab

The History tab stores future and past reservation records, as well as the cabin change log. Other than the Future Reservations section where you can insert, edit, and remove a reservation, all other information on this window are non-editable.

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Figure 10-103 History Tab

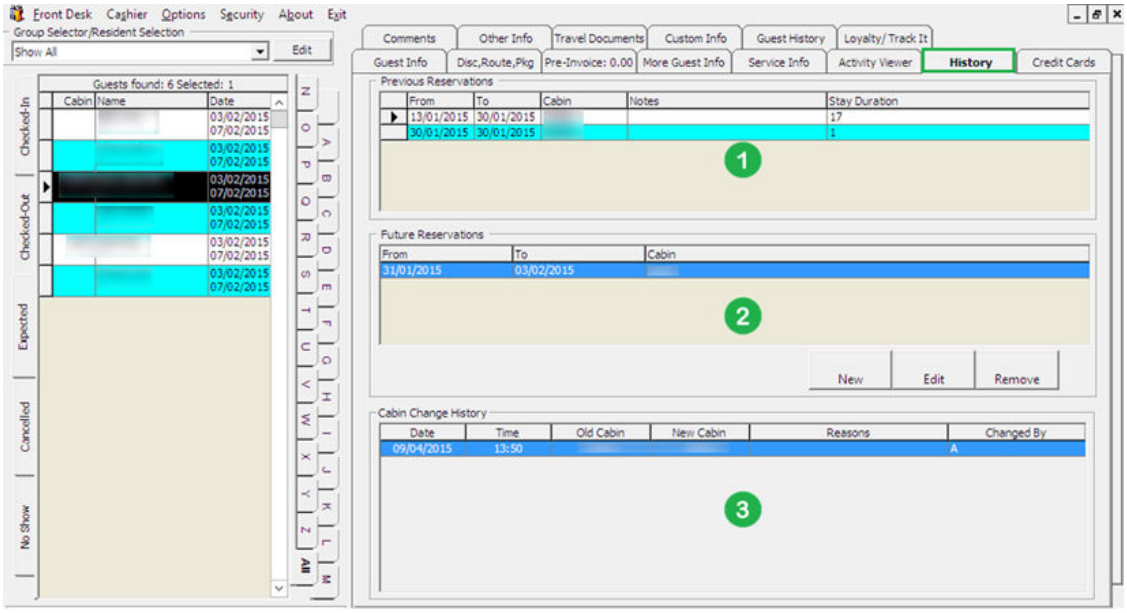


Table 10-31 Field Definition of History Tab

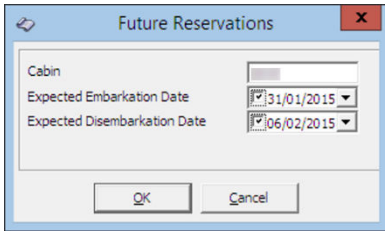
Field	Description
1	This section stores records of previous reservations by date, cabin number, notes, and overall stay duration. Records are captured once you check out the guest.
2	This section stores records of future reservations. During system data change, the system checks for future.
3	This section stores records of cabin assigned to the guest during their stay, including future reservations if any.

Creating Future Reservation

1. Click **New** to open the Future Reservations form.
2. Enter the **Cabin number** and select the **Expected Embarkation/Disembarkation Date**.
3. Click **OK** to save, and the record is inserted in the Future Reservation section.

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Figure 10-104 Creating Future Reservation



Editing Future Reservation

1. In the Future Reservation section, select the future reservation.
2. Click **Edit** to open the Future Reservations form.
3. Edit the information and click **OK** to save the changes.

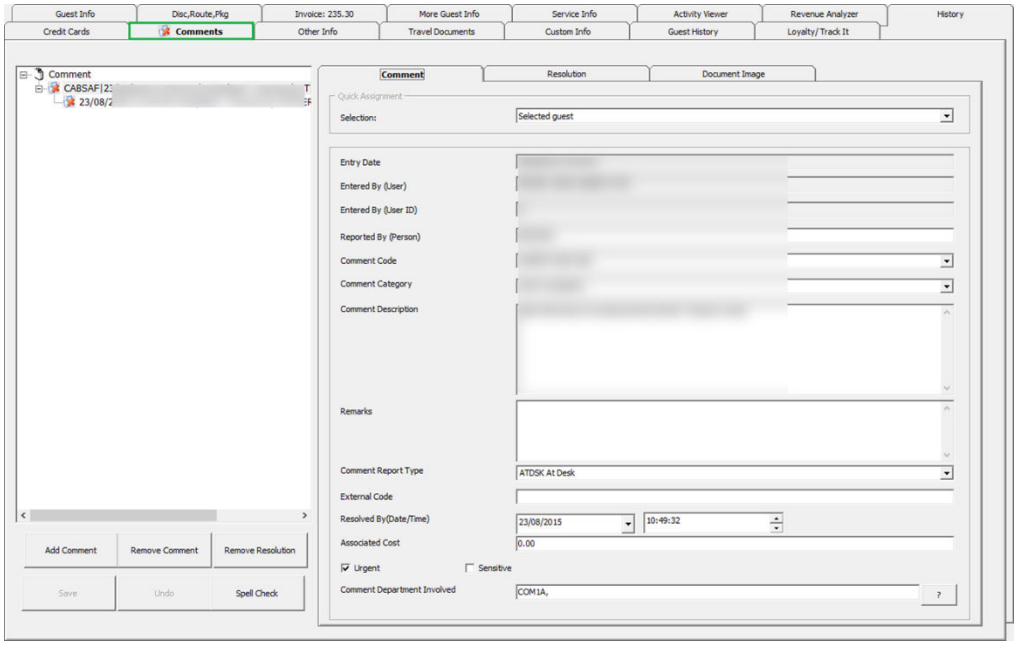
Removing Future Reservation

1. In the **Future Reservation** section, select the future reservation.
2. Click **Remove** to remove the record.

Comments Tab

The Comments tab enables you to follow up on feedback/complaints received pertaining to a cabin, services rendered, facilities, and so on. You can scan or attach an image file and input a comment.

Figure 10-105 Comments Tab



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Adding a Comment/Sub-Comment

1. Click the **Add Comment**.
2. In the Comment tab, select the relevant fields using the drop-down list.
3. Enter the **Reported By, Comment Description, Additional Cost** and check the urgency and sensitivity, if any.
4. Click **Save** to save the record. This places a Red Cross indicator on the Comment.
5. When you select a **Comment** and click **Add Comment**, this creates a sub-comment, defaulting the heading the same as the main Comment Category and Comment Description, and they are not editable.

Attaching Image File

1. At the Document Image tab of the comment, click **Scan Document** or **Upload File** to upload an image from a storage location.
2. Click **Save** to save the image to the database.

Resolving a Comment

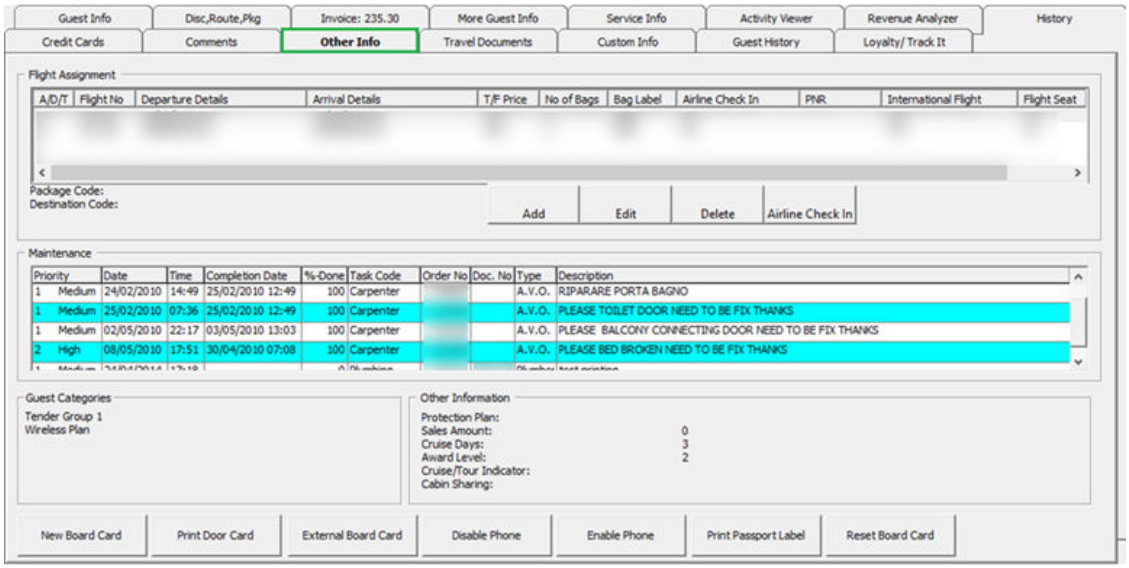
1. Select the main comment and then navigate to the Resolution tab.
2. Enter the **Resolved by (Person)** and **Resolution Description**, and then select the **Resolved** checkbox.
3. Click **Save** to save the resolution. This places a check mark next to the comment(s).
4. Select the **Resolved** checkbox to set all sub-comments as resolved.

Other Info Tab

The Other Info tab stores the passenger flight assignment, cabin maintenance tasks and other general information. Other functions included in this tab are board card printing, enabling/ disabling phone, and printing passport label.

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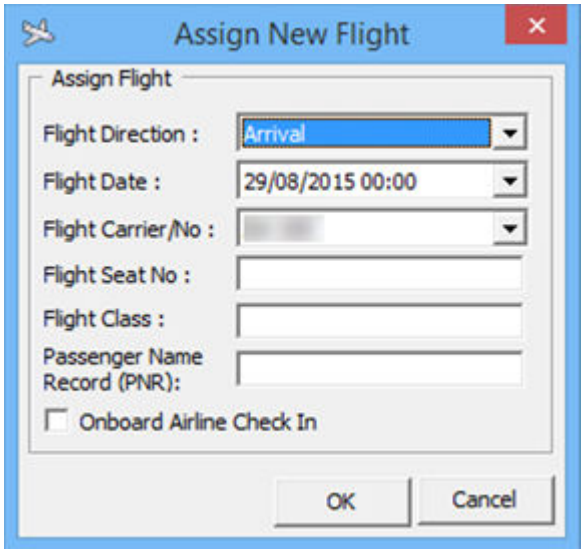
Figure 10-106 Other Information Tab



Flight Assignment

Arrival/departure flight information and transfers arrangements are updated in the Flight Assignment section.

Figure 10-107 Flight Assignment in Other Information Tab



Adding arrival/departure flight details

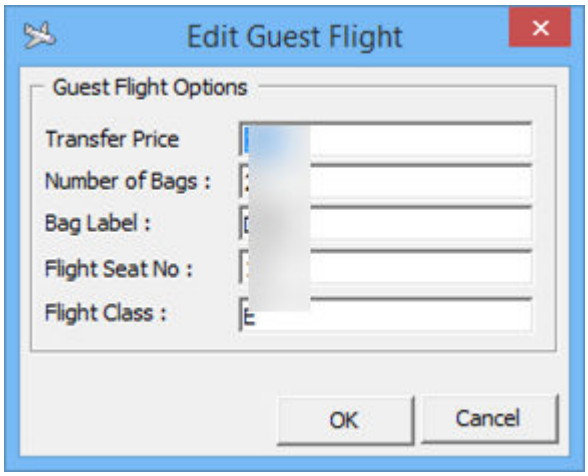
1. Click **Add** in the Other Info tab, Flight Assignment section.
2. Select the **Flight direction, Date, Flight Carrier** from the drop-down list and enter the **Seat No, Flight Class** and **Passenger's Name**.

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3. Click **OK** to save the record.

> **Note**
>
> The Edit assignment only allows you to edit the Transfer Price, Number of bags, Bag Label, or Seat number.

Figure 10-108 Edit Flight Assignment



Maintenance

The Maintenance section displays all maintenance task related to selected cabin, regardless of its completion status. These task are entered in the Maintenance module.

Guest Categories

The Guest Categories section displays the selected information from Edit Information, Guest Categories checkbox. The information is configured in Administration, System Codes, Guest Categories Codes.

Guest Categories / Other Information

The Guest Categories and Other Information section displays the selected information from Edit Information, Guest Categories checkbox and various fields in the Name/Reservation section.

Travel Documents Tab

Details of the guest passport, identification or any travel documents captured through the passport/ID scanning device are stored in this tab and purged at the end of the cruise or according to the policy defined by the Ship.

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Figure 10-109 Travel Documents Tab

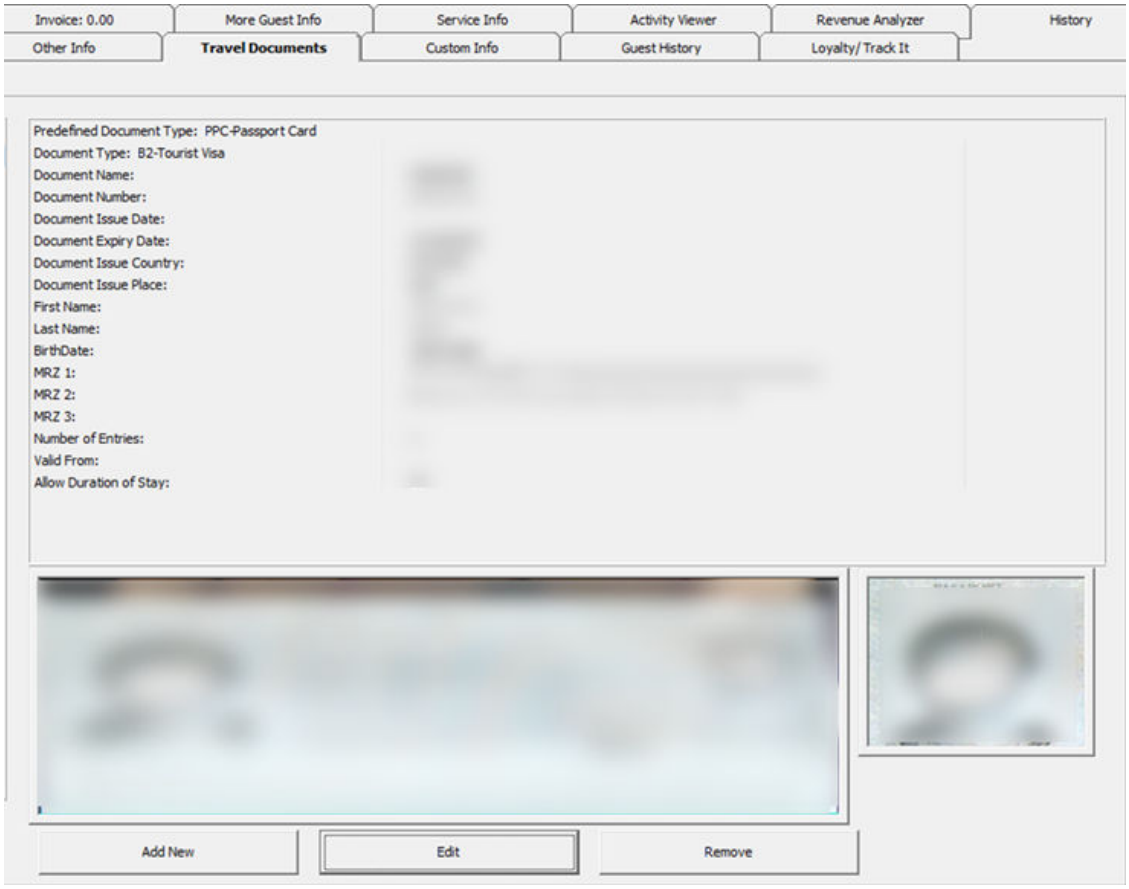


Table 10-32 Field Definition of Travel Documents

Field	Description
Predefined Document Type	Document type configured in Administration Module, for example: passport, identification card.
Document Type	Type of Visa.
Document Number	Passport or ID number.
Issue Date	Document issue date.
Expiry Date	Document expiry date.
Birthdate	Passenger Birthdate.
Issued Country	Country document were issued.
Valid From	Validity of document.
Document Name	Document type.
Issued Place	Document issued place.
Last Name	Last Name.
Code MRZ1	Machine Reader Track 1.
Code MRZ2	Machine Reader Track 3.
Code MRZ3	Machine Reader Track 3

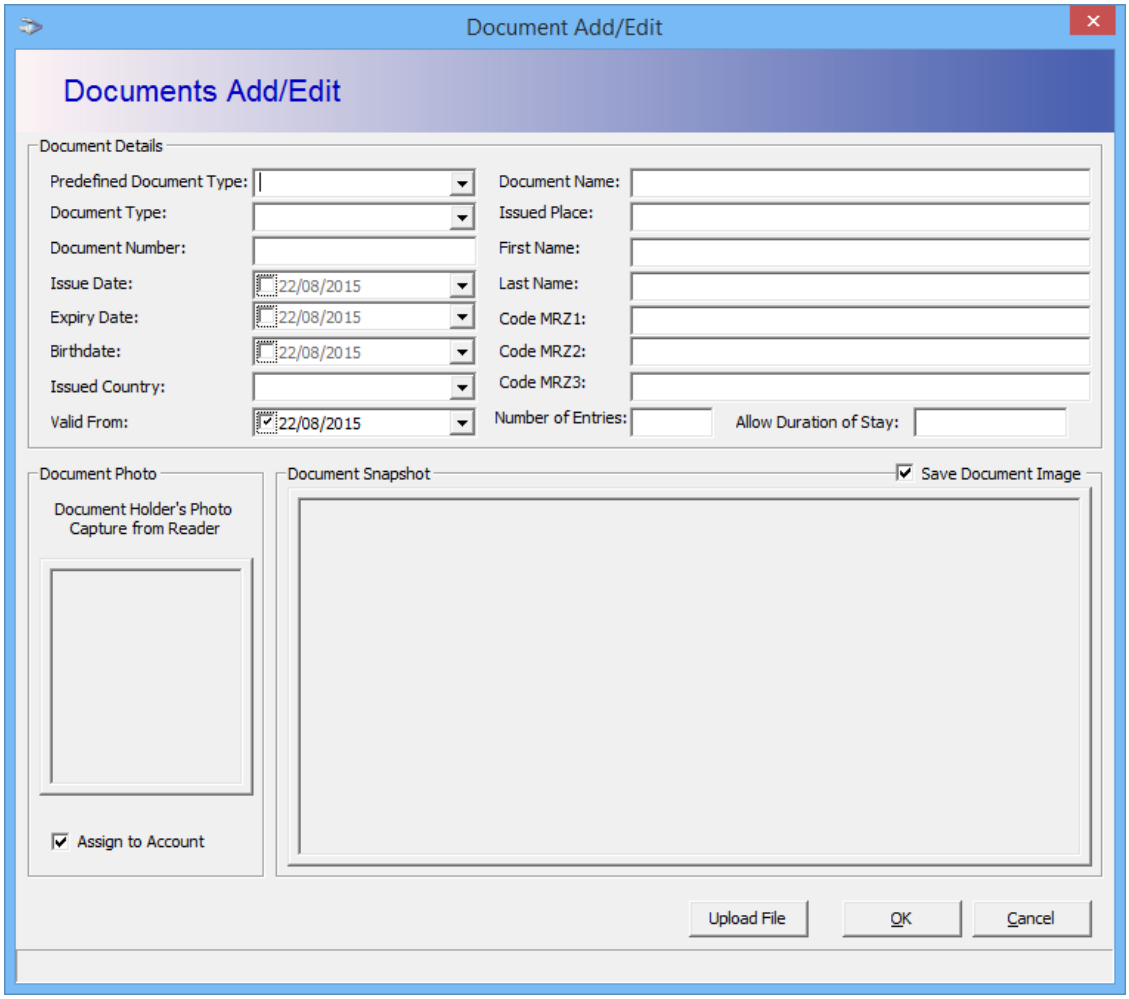
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Table 10-32 (Cont.) Field Definition of Travel Documents

Field	Description
Number of Entries	Number of entries allowed.
Allow Duration of Stay	Allowed duration of stay on each visit.

Adding/Editing a Travel Document

Figure 10-110 Travel Document Add/Edit Window



1. In the Travel Documents tab, click **Add new** to open the Document Add/Edit form.
2. Fill in all relevant information using the drop-down list or by manually entry.
3. Click **Upload File** to upload the picture or scanned a document.
4. Click **OK** to save the travel document.
5. To edit, click the **Edit**, update the relevant information, and then click **OK** to save.

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Custom Info Tab

The Custom Info tab is a user definable field that allows you to customize the field according to your operational requirements. The field names are defined in *Administration Guide, User Definable Field Setup* .

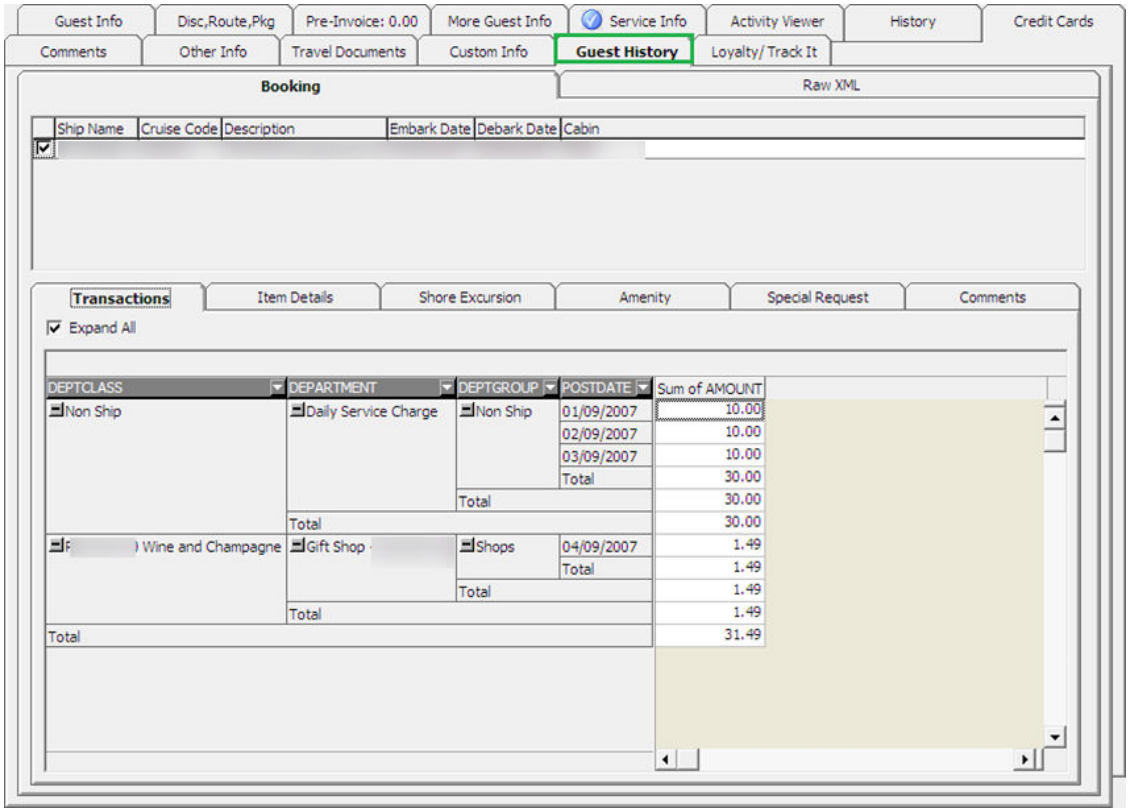
Guest History Tab

The Guest History tab captures the guest's history, such as reservations, amount spent, amenities, and special requests from various ships. The data is transferred from the Shoreside Fleet Management System database through a ResOnline Interface. The Guest History window contains two main tabs - Booking and Raw XML.

Booking tab

The Booking tab is segmented into five different views: Transactions, Item Details, Shore Excursion, Amenity, Special Request and Comments.

Figure 10-111 Guest History Tab



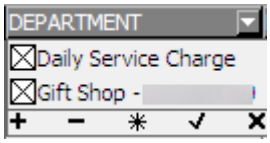
Transactions Tab

The first tab in the Booking tab is Transactions. In this tab, past transactions from previous cruises are sorted by Department class, Department code, Department Group, Postdate, and Sum of amount are shown.

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Pressing the **+/-** or the arrow down key explodes or implodes the details under each station, enabling information in each respective columns to be further drilled down.

Figure 10-112 Department Check Box



Item Details

The Item Details tab list all the POS Postings in details.

Shore Excursion

The Shore Excursion tab displays past excursions participated by the guest.

Amenity

The Amenity tab displays past chargeable amenities requests from previous cruises.

Special Request

Special Request tab displays the request history during each stay while on-board.

Comments

The Comments tab displays past comments inserted on previous cruise.

Raw XML

The Raw XML tab shows the actual passenger history in XML format that was sent from Reservation Online to the ship database.

Figure 10-113 Guest History Raw XML Tab



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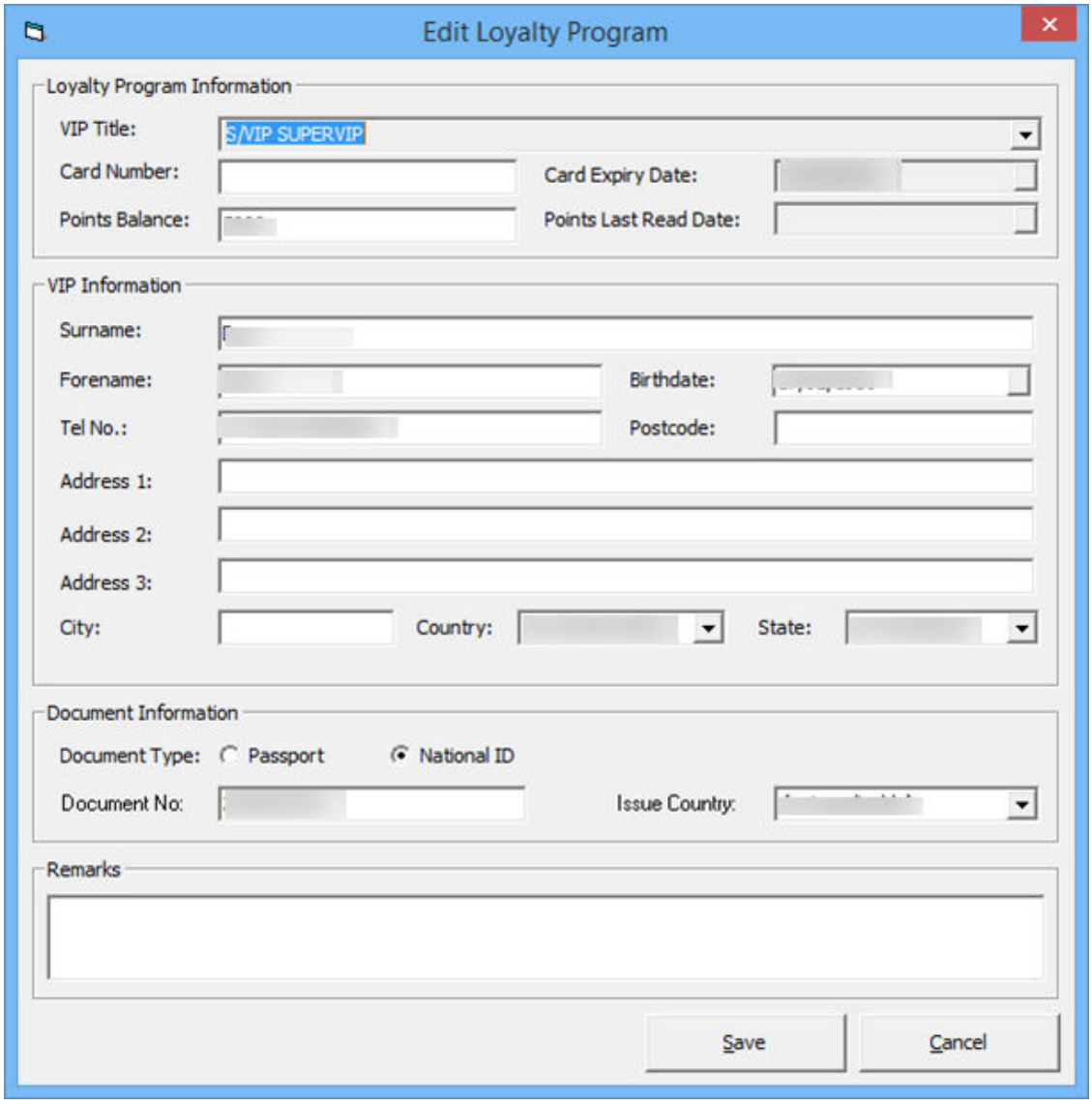
Loyalty/TrackIt Tab

The Loyalty/TrackIt tab provides a quick overview on the loyalty program the passenger is attached to, and items that were confiscated or returned during embarkation/disembarkation. The confiscated items are managed in the TrackIt module.

Loyalty Assignment

A guest can enroll in a loyalty program through the course of the voyage. The program stores information such as loyalty card number, points balance, and personal details in this tab.

Figure 10-114 Loyalty Program Form



Adding / Editing a Loyalty Program

1. In the Loyalty/TrackIt tab, click **Add** to open the Edit Loyalty program form.

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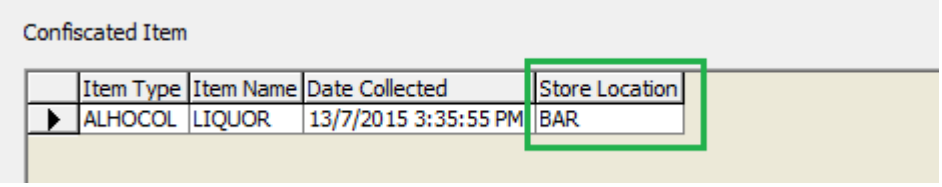
2. Fill in all relevant information using the drop-down list or by manually entering the information.
3. To edit existing information, select the line item, click **Edit**, and then update the information.
4. Click **Save** to save the information.

Confiscated Item

The movement and storage location of confiscated items appears in the following section, and records are updated:

- When a confiscated item is *returned* or *checked-out temporarily* to the passenger, the system **removes** the record from the Confiscated Item section.
- When a confiscated item is checked-in by the passenger, the system **inserts** a record in the Confiscated Item section.

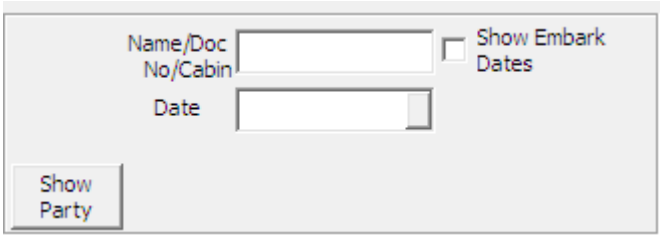
Figure 10-115 Confiscated Item Storage Location



Renew Reservation Function

You can renew a reservation of a checked-out guest using the guest historical data instead of creating a reservation.

1. Navigate to the **Check Out** tab in Search panel.
2. By default, the date is set to *System Date*. Change the date to the passenger check-out date.



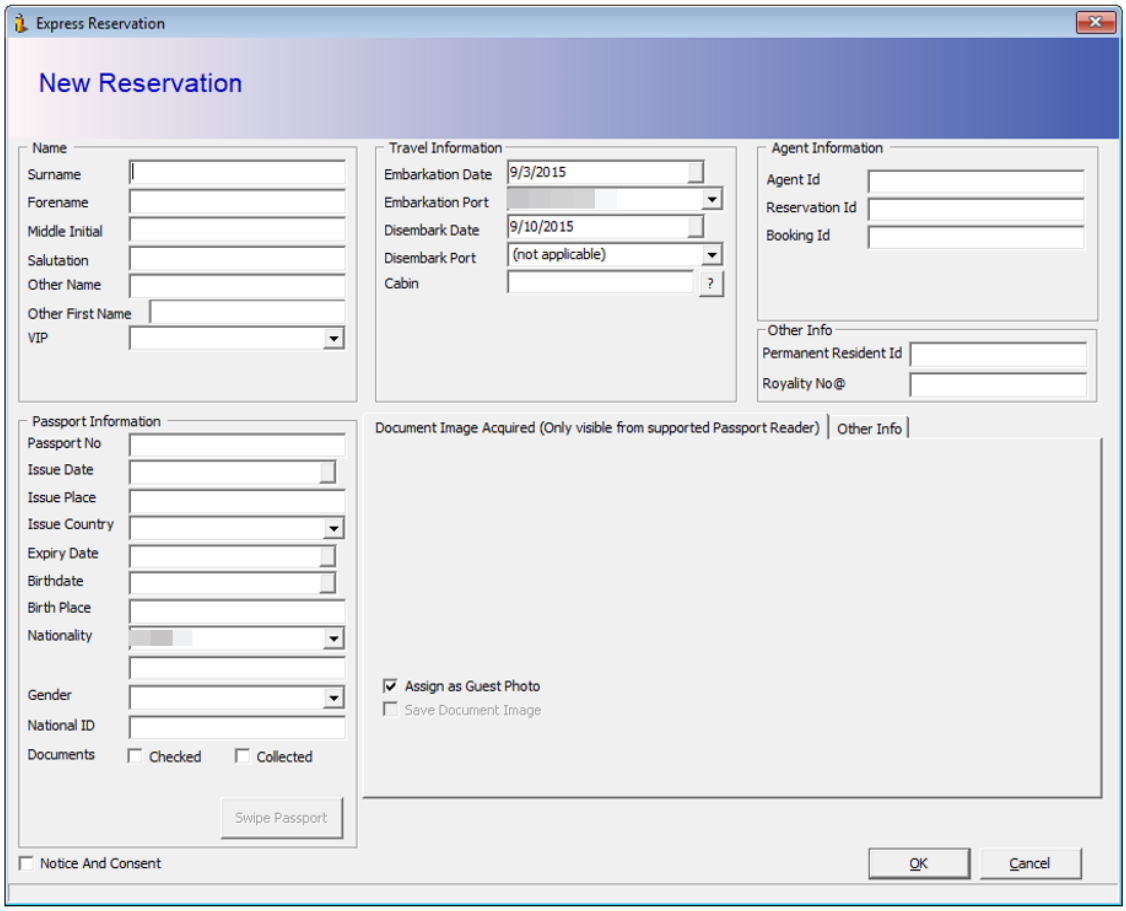
3. Enter the guest last name or use the alphabets tab to search. Selecting the **ALL** tab will list all passengers departed on the date specified.
4. Click the **Re-New Reservation** at the Guest Handling window.
5. At the New Guest Reservation prompt, select **Yes** to renew the reservation.
6. Click **Edit Information** to change the expected arrival date, if required.

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Express Reservation Function

The Express Reservation function within Guest Handling enables you to create a quick reservation using a simplified Reservation Form. See New Reservation Function for further information of the field descriptions.

Figure 10-116 Express Reservation Form



Creating an Express Reservation

1. Click the **New Reservation** at the Guest Handling window to open the Express reservation form.
2. Enter all required information and update the embarkation / debarkation date. By default, the Embarkation Date on the form is set to the current System Date.
3. Click **OK** to save the reservation.

Get Credit Cards Function

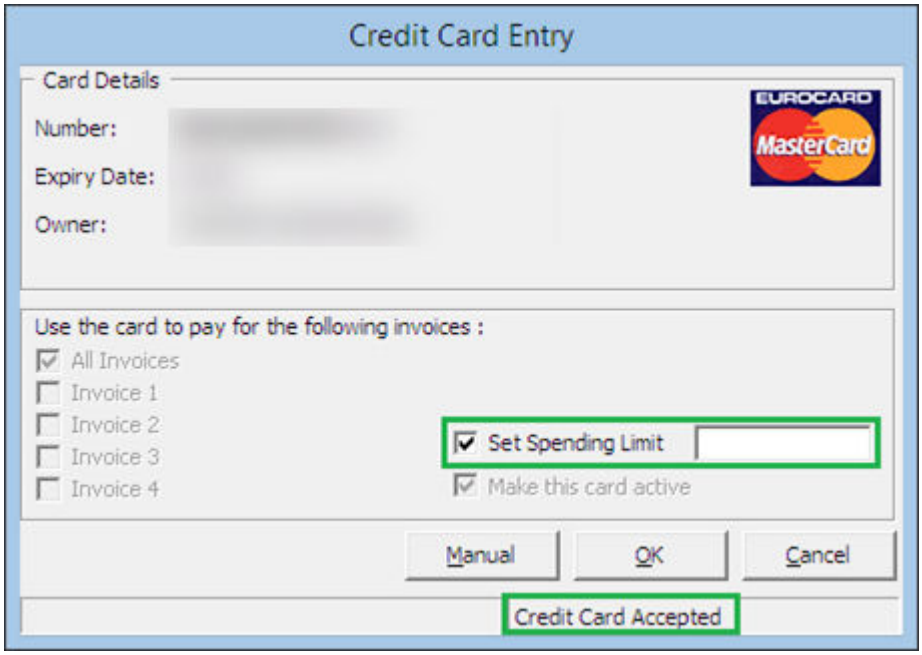
Get Credit Card enables you to update the passenger's credit card details by swiping the card through the magnetic card reader.

Updating Credit Card Details

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1. In the Search panel, search for the guest record and then click **Get Credit Card** in the Guest Handling window to open the blank Credit Card Entry form.
2. In the blank Credit Card Entry form, swipe the credit card through the magnetic card reader to capture the credit card details and have it auto populate in the window.

Figure 10-117 Setting Credit Card Spending Limit



3. Select the **Set Spending Limit** checkbox to enter the credit limit of the card..

Manual Update of Credit Card Details

1. In the blank Credit Card Entry form, click **Manual**.
2. Enter the card information in the field provided and then click **OK** to save.
3. Click **Yes** in the CC-Check dialog box to update the credit card details onto the guest account.
4. You can view the stored credit card details from the Credit Card tab.

Capturing an Electronic Signature

If you have a Signature Capture device installed, you can capture a sample of the guest signature in the Credit Card tab.

Storing Sample Signature

1. Repeat steps 1 to 3 of above.
2. Sign on the column provided in the **Signature Device**, press **Confirm** and then **Capture Signature** to save the signature against the passenger credit card record.
3. The stored credit card details and signature are saved in Credit Card tab.

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Registering Multiple Credit Card

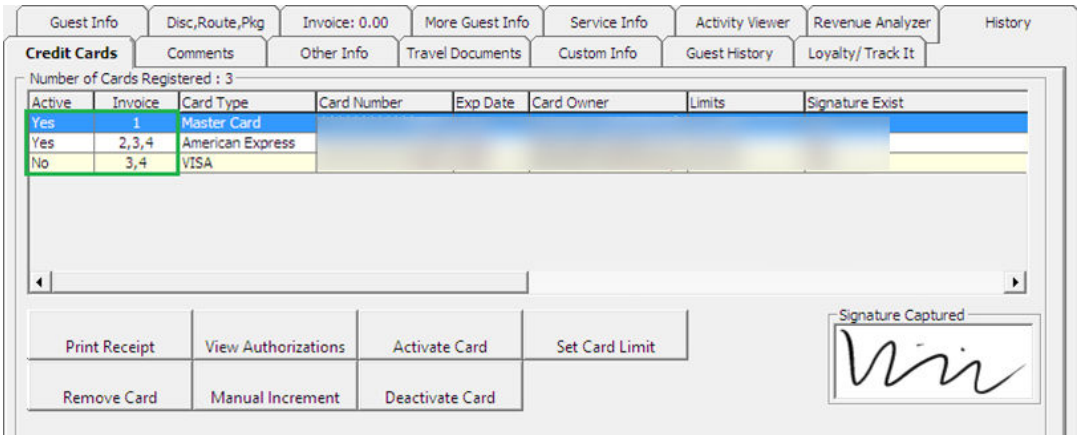
Multiple card types can be stored for ease of settlement. This is particularly useful when a guest decides to settle part of their invoices using certain card.

1. Repeat steps 1 to 3 of Updating Credit Card Details.
2. The system prompts a notification that there are more than one card being registered. Click **Yes** at the CC-Check prompt to register the card.

Activating Credit Card for a Particular Invoice

1. At the Credit Card tab, select the card to activate, and then click **Activate Card**.
2. Check mark the invoice at the Activate Credit Card prompt and click **Activate**.
3. The chosen invoice appears under **Invoice column**, and the card is set as **Active**.

Figure 10-118 Multiple Credit Card Assignment



Check In Function

Guest joining the cruise are required to checked-in to the system prior to boarding, and these reservations are categorized under the Expected tab.

1. Retrieve the reservation from the **Search Panel, Expected** tab and then click **Check-In**.
2. At the Check In prompt, click **Yes** to check in the reservation and print keycard at the same time.

Check Out Function

At the end of the voyage, you must check-out all the guest accounts from the system. This is to ensure that all accounts are in balance before performing a System Cruise Change.

1. Retrieve the reservation from the **Search Pane, Check In** tab and then click **Check Out**.
2. At the Check Out prompt, select **Yes** to check out the reservation.
3. If the account is unbalanced, the system prompts for an invoice to be settled before proceeding. Click **OK** to return to the guest account.

See Pay Invoice section for steps to settle an account.

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Print Board Card Function

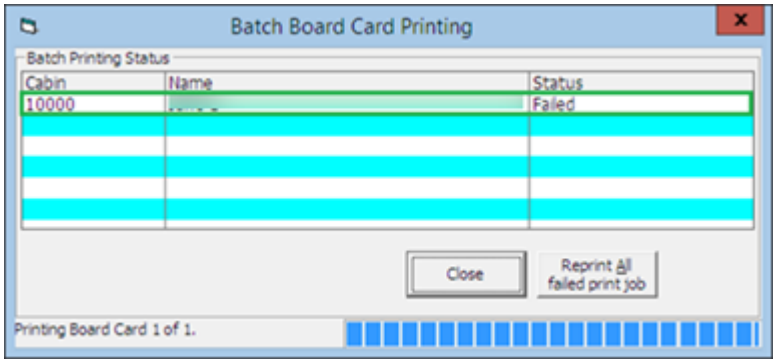
The Print Board Card function in Guest Handling enables you to print a copy of guest board cards if they were not printed earlier.

1. Retrieve the reservation from the Search panel and then click the **Print Board Card**.
2. At the Print Board Cards prompt, click **Yes** to save the board card number under the Guest Info tab. This process increases the board card number shown in the Guest Info tab, and the last digit of the board card denotes the number of times the board card was re-printed. The first printed card always ends with 0.

> **Note**
>
> The new card will have the same charge code and door lock code and will not invalidate the previous charge card nor door card

3. Select a reason from the drop-down list when prompted and then click **OK**.
4. The status of the printed card is reflected in the Batch Board Card Printing window. If the card status is **Failed**, click **Reprint All failed print job** to reprint.
5. Check the Interface or Printer connectivity if the board card fails to print.

Figure 10-119 Batch Board Card Printing



Printing New Board Card

During a cabin move or when guests extends their stay, a re-code of board card is required, which you can print from **Guest Handling, Other Info** tab.

1. At the Other Info tab, click the **New Board Card** and click **Yes** at the Recreate Cards prompt.
2. In the Print Board Card Reason prompt, select the reason from the drop-down list, and press **OK** to confirm.

Resetting a Board Card

For a lost card, a change of lock combination for the cabin is necessary, and this process re-assigns a new board card number to all occupants of the same cabin.

1. At the Other Info tab, click **Reset Board Card**.
2. Select **Yes** at the Recreate Cards prompt to invalidate all previously issued cards.

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> **Note**
>
> This will invalidate all charge and door information on all cards for all people in the Cabin.

Figure 10-120 Boardcard Number in Guest Information Tab



3. In the Print Board Card Reason prompt, select the reason from the drop-down list and then click **OK** to confirm.
4. At the Batch Board Card Printing prompt, click **Close** if the card prints successfully. Otherwise, repeat the above steps.

Change Cabin Function

A cabin can become unavailable due to defect, or the guest may want to move to a larger cabin or cabin closer to their family/friends. This would require a cabin change. Depending on the policy and procedures of the Ship, such a change might be chargeable. If a fee is applicable, you can set this up in the *Administration, Financial Setup, Stateroom Upgrade Prices* module.

You can perform a cabin change from different function — using either the Cabin Change function, Edit Information or the Edit Express Reservation function.

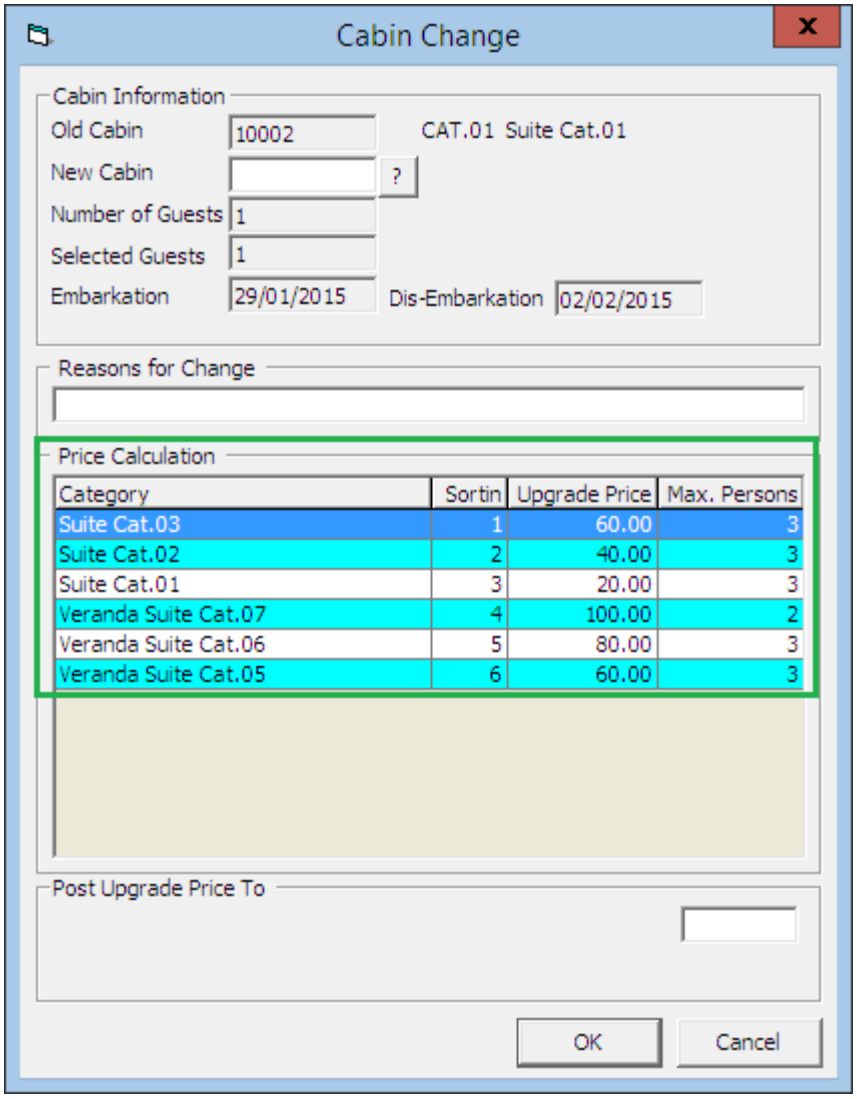
Changing a Cabin Using Cabin Change

When a cabin change is chargeable, it is recommended that you perform the task using the Cabin Change option in the Guest Handling function. A setup such as **Financial Department, General Change Reason** and **Database Parameter** must be in place in order for the charge to be posted. See *Administration Chapter– Stateroom Upgrade Setup* for more details.

1. Look up the guest account in the Search panel, and then click **Change Cabin** in the Guest Handling window.
2. The system prompts a pre-configured **Cabin Upgrade Price Calculation** table. Click the **question mark (?)** next to the **New Cabin** field to search for a new cabin.

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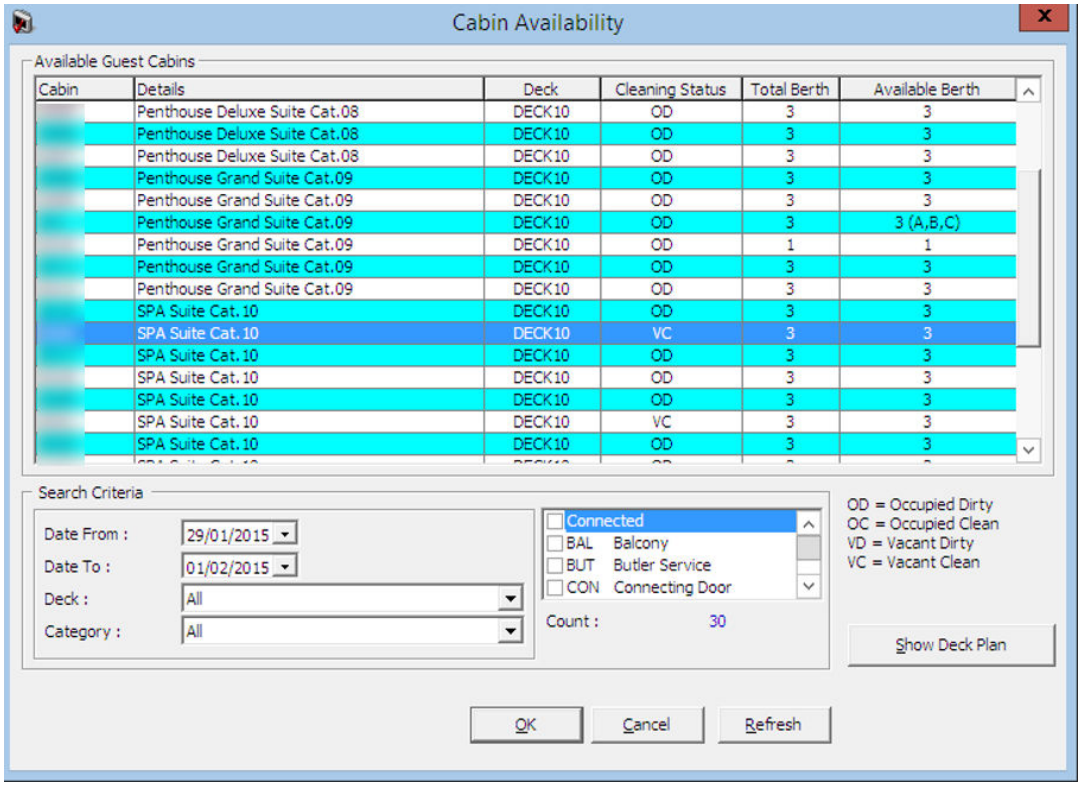
Figure 10-121 Cabin Change Function



3. In the Cabin Availability window, select **date from/to, Deck, Category** from the drop-down list in the Search Criteria section, and then click **Refresh** to update the availability grid.

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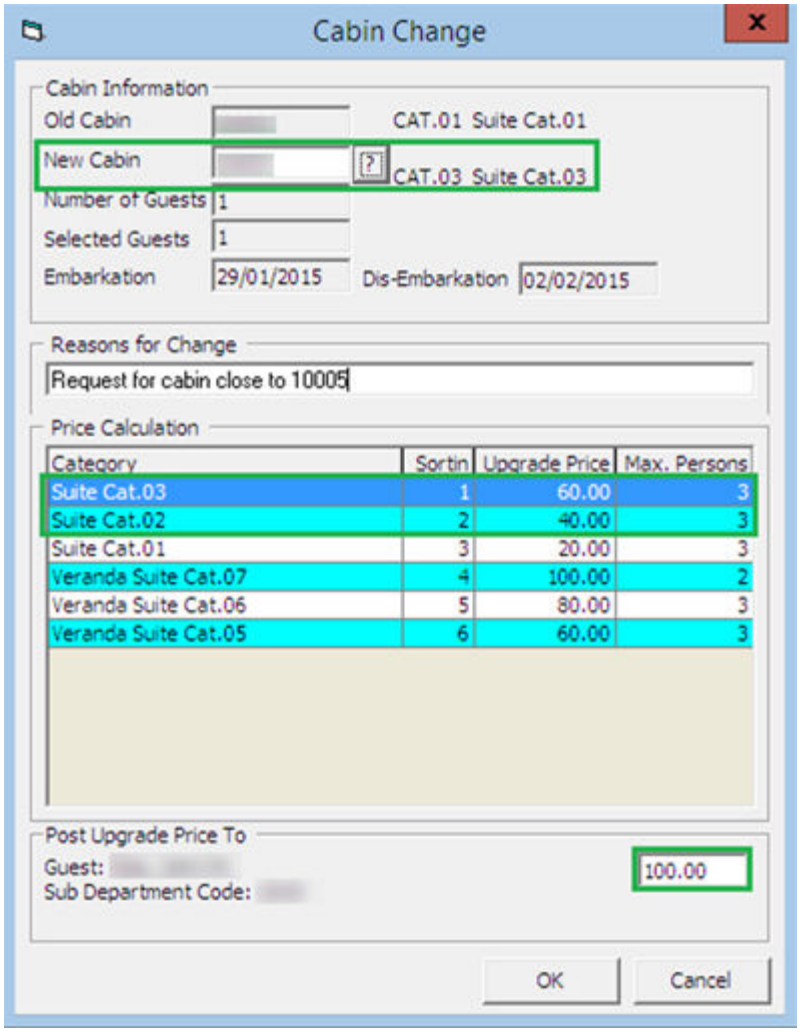
Figure 10-122 Cabin Availability Window



4. Select the desired cabin by highlighting the cabin number and clicking **OK** to confirm.

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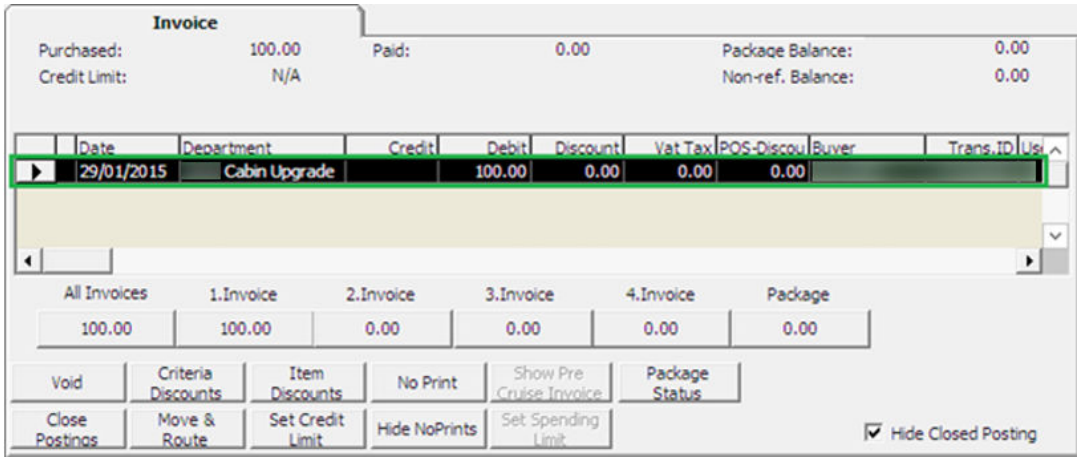
Figure 10-123 Cabin Change Price Calculation



5. The system automatically calculates the upgrade price based on the selected category, and in this instance, the guest is moving from Cat.01 to Cat.03 and the chargeable price is at $100, which is a total comprised of Cat.02+Cat03.
6. At the **Reasons for Change** prompt, enter the reason for the change in the free text field.
7. Click **Yes** in the Cabin Change prompt to confirm and post a charge to the guest account.

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Figure 10-124 Cabin Upgrade Charge Posted to Guest Account



Changing an Assigned Cabin

When the assigned cabin for the guest becomes unavailable at the point of check-in, re-assignment of the cabin is required. In such cases, the cabin change is done by editing the reservation.

1. Repeat steps 1 to 4 of the above.
2. In the Reasons for Change prompt, select the reason for the change from the drop-down list, then click **OK** to save the changes.
3. Click **OK** on the Edit Information form to save the cabin reassignment.

Assigning a Cabin in Edit Express Information

At the point of creating a reservation using Express Reservation, you can assign a cabin number to the guest. The process is the same as Changing An Assigned Cabin in Edit Information.

Messages Function

There are occasions when you are required to notify the guest of their reservations, tour arrangements, or inquiries by leaving a message in their cabin. These messages are not only presented in hard copy, but can also prompt on a window at the Gangway, Internal Gate, or Immigration Gate when scanning the guest board card.

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Figure 10-125 Message Form

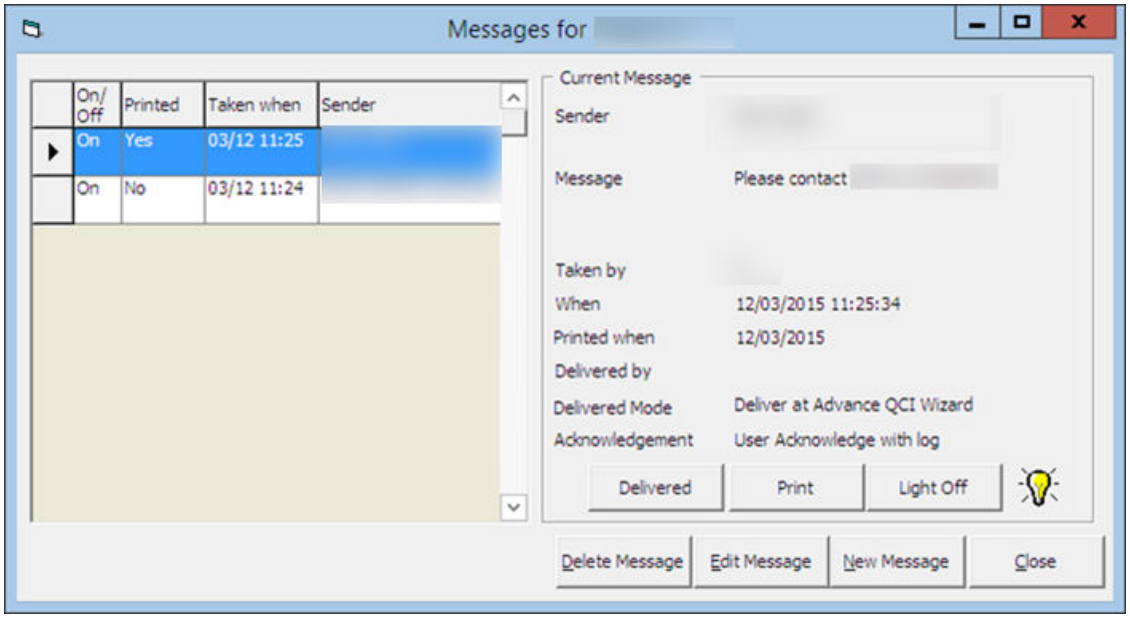


Table 10-33 Field Definition of Message Form

Field	Description
On/Off	Message light indicator.
Printed	Indicator whether message has been printed.
Taken When	Date/Time message were entered.
Sender	Sender's Name enter.
Message	Content of the message.
Taken by	User who enter the message.
Delivered by	User who deliver the message.
Delivered Mode	Location of where to prompt for message delivery, at Advance QCI Wizard, Gangway, Internal Gate, Immigration Gate, or none.
Acknowledgement	Type of delivery acknowledgement, either by User, Manager, or none.
Delivered button	Sets the message status to/from delivered.
Print button	Print selected message.
Light On/Off	Sets on/off phone message light in cabin.
Delete Message	Remove message from passenger account.
Edit Message	Edit message content and/change delivery mode.
New Message	Creates a new message.

Creating / Editing a Message

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1. Look up the guest account in the Search panel, and click **Message** in the Guest Handling window.
2. On the Message form, click **New Message** to create a new message or **Edit Message** to edit and existing message.
3. Enter the **Sender's name** and **message content** in the respective areas.
4. Select the **Delivery** and **Acknowledgement Mode** from the drop-down list and click **OK** to save.
5. New Messages entered set the message light to **On** automatically. This setting is controlled by the **Parameter, General, Message Light On** parameter.
6. To edit a message, click **Edit Message**, edit the content, and click **OK** to save the changes.
7. A check mark is placed in the Message tab as an indicator of undelivered messages.

Delivering / Undo Delivery of a Message

1. Look up the guest account in the Search panel, and then click **Message** in the Guest Handling tab.
2. On the Message form, select the message to deliver and click **Delivered** to confirm delivery. This inserts the Delivered by date/time.
3. This process *does not* turn off the message light automatically. You must click **Light Off** to reset the message light.
4. In Delivered by, the user name, delivery date, and time is recorded.
5. To reset the message delivery to undelivered, click **Delivered** and select **Yes** at the message prompt.

Deleting a Message

1. Search the guest account in the Search panel, and click **Message** at Guest Handling tab.
2. On the Message form, select the message to delete and click **Delete Message**.
3. At the Delete Message prompt, select **Yes** to confirm deletion of the Message or **No** to return to the earlier window. Once a message is deleted, it *cannot* be undone.

Printing a Message

1. On the Message form, select a message and then click **Print**.
2. The indicator in the **Printed** column switches to **Yes**, and the date the message was printed appears in the Message Grid.

Turning Message Light On/Off

The message light is automatically turned on as an indicator to the guest that there are messages for them. If the message function is used for internal messaging, it is best not to set the message light on when creating a message, and this is managed in the **General, Message Light On** parameter.

1. On the Message form, select the message and then click the **Light On/Off**.

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2. If the message light is:
   - **On**: The light bulb is illuminated. Clicking **Light Off** to turn off the light.
   - **Off**: The light bulb is dimmed. Click **Light ON** to illuminate the light.
3. Click **Light On/Off** to trigger the indicator for all messages in the Message grid.

Express Edit Information Function

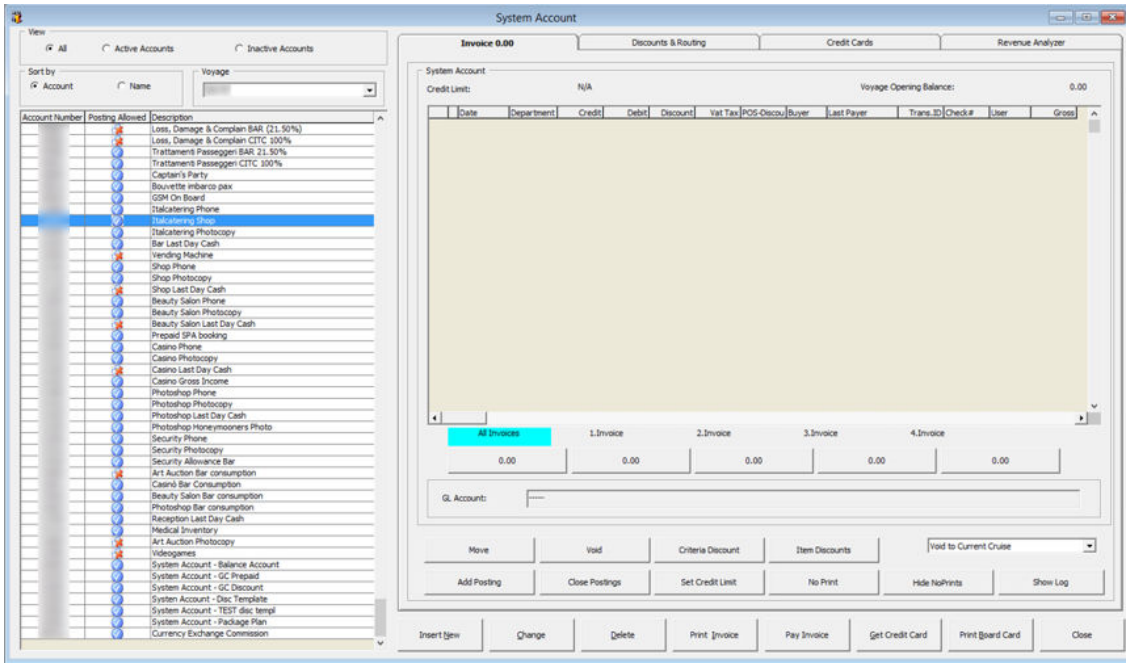
The Express Edit Information function enables you to edit the basic reservation information as displayed in the Express Reservation function.

1. In the Search panel, search for the guest account and then click the **Express Edit Information** in the Guest handling window.
2. Update the relevant information on the Express Reservation form and then click **OK** to save the changes. See New Reservation Function for further information of the field descriptions.

System Accounts

System Accounts is a repository account mainly used for postings that do not impact any of the passenger's account, for example, Cash postings from an outlet, Ad-hoc purchases, Crew signing privilege, or as an adjustment account. These accounts do not have a check-in/out date, and when not in use, you can set them to Inactive.

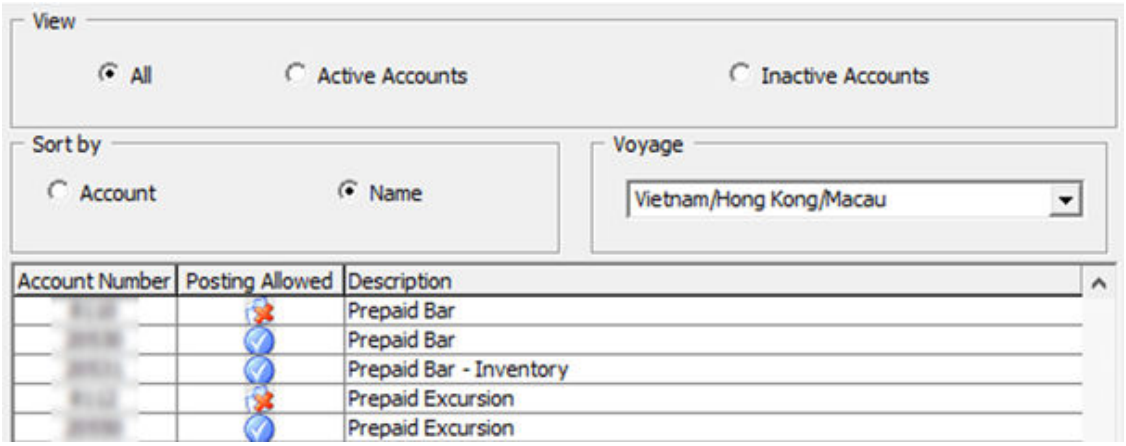
Figure 10-126 System Account



In the System Account Main window, accounts are filtered by **All, Active Accounts,** or **Inactive Accounts**, sortable by **Account/Name** or **Voyage**.

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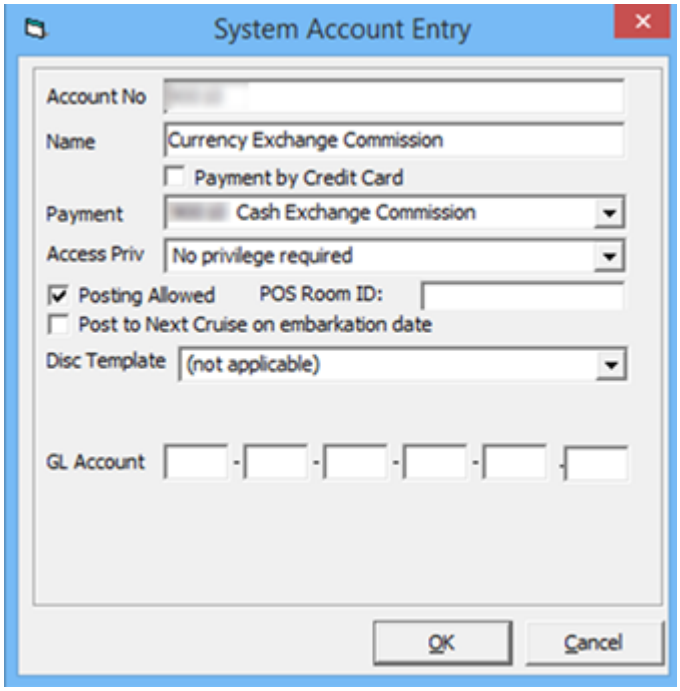
Figure 10-127 System Account Filters



Creating a System Account

1. In the Management module, select **Cashier**, and then select **System Accounts** from the drop-down menu.
2. In the System Account window, select **Insert New**.
3. Enter the information for the account and click **OK** to save. The newly created account appear as **Active** in the account list.

Figure 10-128 System Account Entry Form



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Table 10-34 Field Definition of System Account Entry Form

Field	Description
Account No	User Assigned account number.
Name	System Account Name.
Payment by Credit Card	Enable credit card payment type.
Payment	Payment type linked to Department Codes in Financial Setup.
Access Priv	Privilege level allowed to access the account.
Posting Allowed	Sets the account Active/Inactive.
POS Room ID	Assigned Room ID for POS System.
Post to Next Cruise on embarkation date	Enable posting of charges into the next Cruise when the account is balanced.
Disc Template	Link to available Discount template and apply the discount when the posting added is a department code listed in the template.
GL Account	Link the transactions to designated GL account. Requires the **General, Enable System Account GL Setting** parameter.

Changing the System Account Information

Information of the System Account can be changed by selecting the account from the Account list, clicking **Change**, and then clicking **OK** to save.

Deleting a System Account

> **Note**
>
> An account can be deleted only when there are *no* postings linked to the account.

Posting a Charge to System Account

Posting a charge to a System Account is similar to Add Posting in Guest Handling. See Invoice Tab on how to Add, Void, Move and Route posting, Pay and Print an invoice, and other posting related functions.

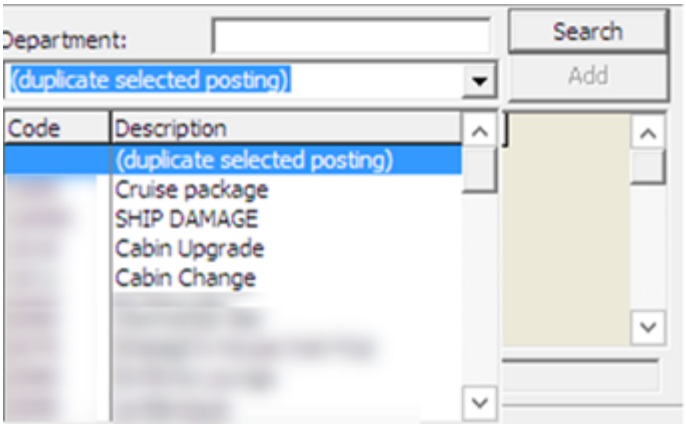
Enabling Posting for Next Cruise

The System Account allows you to post to future cruises by selecting the **Post to Next cruise on embarkation date** in the System Account Entry form.

1. Retrieve the guest account from the Search panel and click **Add Posting** in the Guest Handling window.
2. On the **Add Postings** form, select the **Financial Department** from the drop-down list or use the **Search** option to search for a department code.

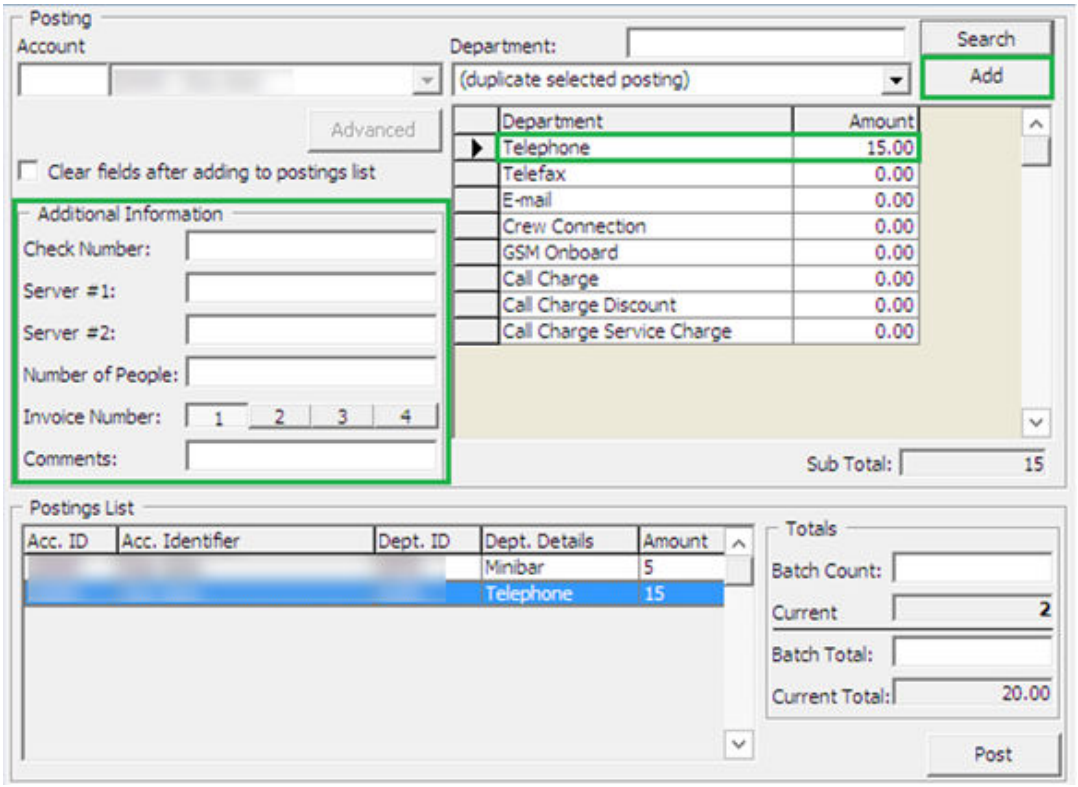
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Figure 10-129 Add Posting Financial Department Selection



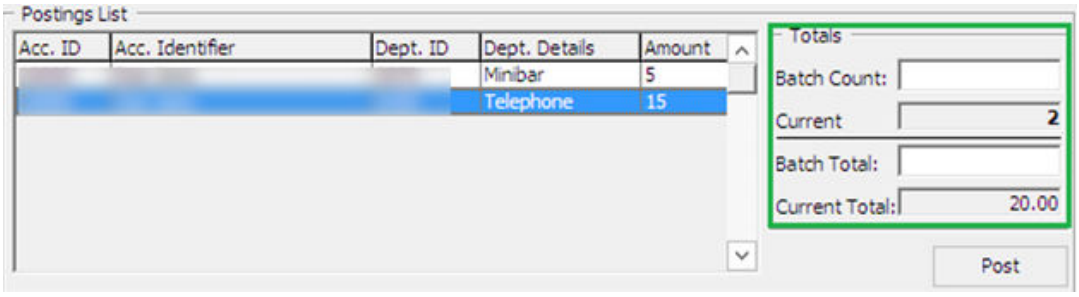
3. Insert a **Value, Check Number**, select the **Invoice number** to post, and click **Add**. This transfers the posting to the **Postings List** section, enabling you to post more than one charge.

Figure 10-130 Adding a Charge



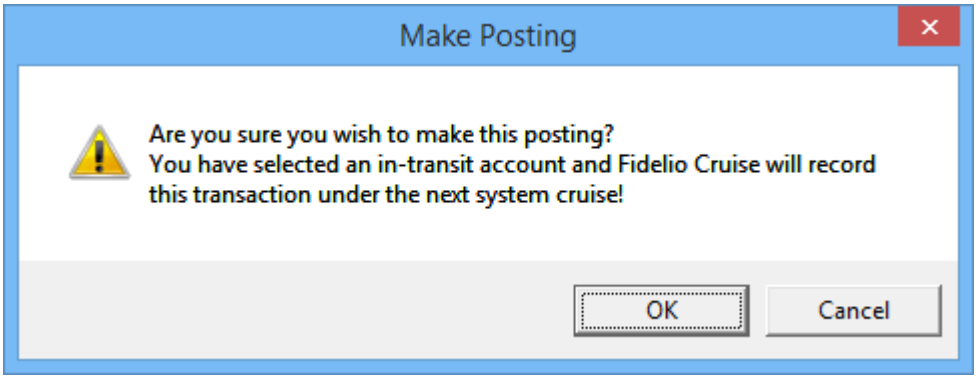
4. Item count increases automatically when the posting is more than one.

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5. Click **Post** to finalize the posting.
6. At the Make Posting warning prompt, select **OK** to proceed to post to the next cruise.

Figure 10-131 Posting to Future Cruise Warning Prompt



> **Note**
>
> Postings appear in the Invoice tab until you perform a System Cruise Change.

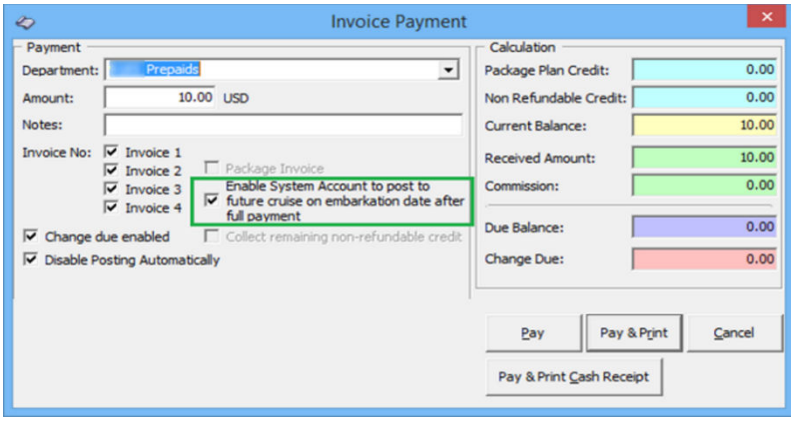
Applying Payment to Next Cruise Posting

When applying a payment to a future cruise, the account must have the **Post to Next Cruise on embarkation date** selected, otherwise the system posts the payment into the current cruise.

1. In the System Account Invoice tab, select **Pay Invoice**.
2. In the Invoice Payment window, the **Enable System Account to post to future cruise on Embarkation date after full payment** is checked.

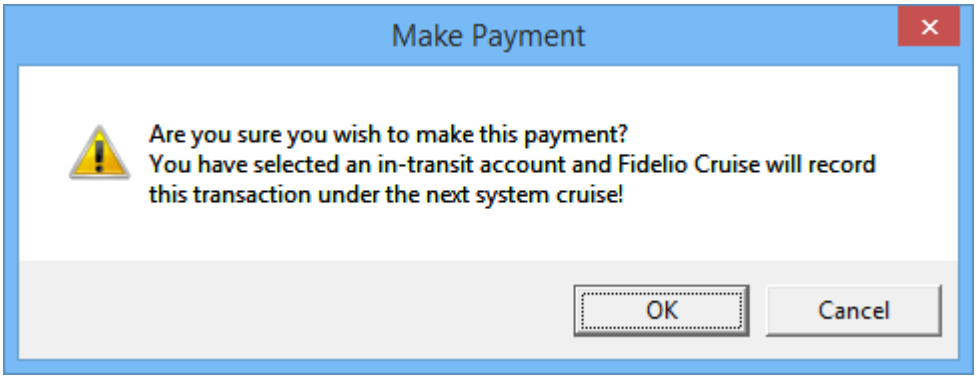
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Figure 10-132 Payment to Next Cruise



3. Click either **Pay** or **Pay & Print** to post the payment.
4. Under the Make Payment warning prompt, select **OK** to the post payment on the next cruise.

Figure 10-133 Payment to Future Cruise Prompt



> **Note**
>
> If the **Post to Next Cruise on embarkation date** is *not checked* in the System Account Entry form, the system posts the payment in the current cruise by default, and this may cause an imbalance.

Discount & Routing Tab

The Discount & Routing tab is in the System Account function the same way as Discount handling in Guest Handling. See Disc, Route, Pkg for more information.

Registering a Credit Card

The Credit Card registration process in System Account is the same as in Guest Handling, Get Card Function. See Get Credit Cards Function for more information.

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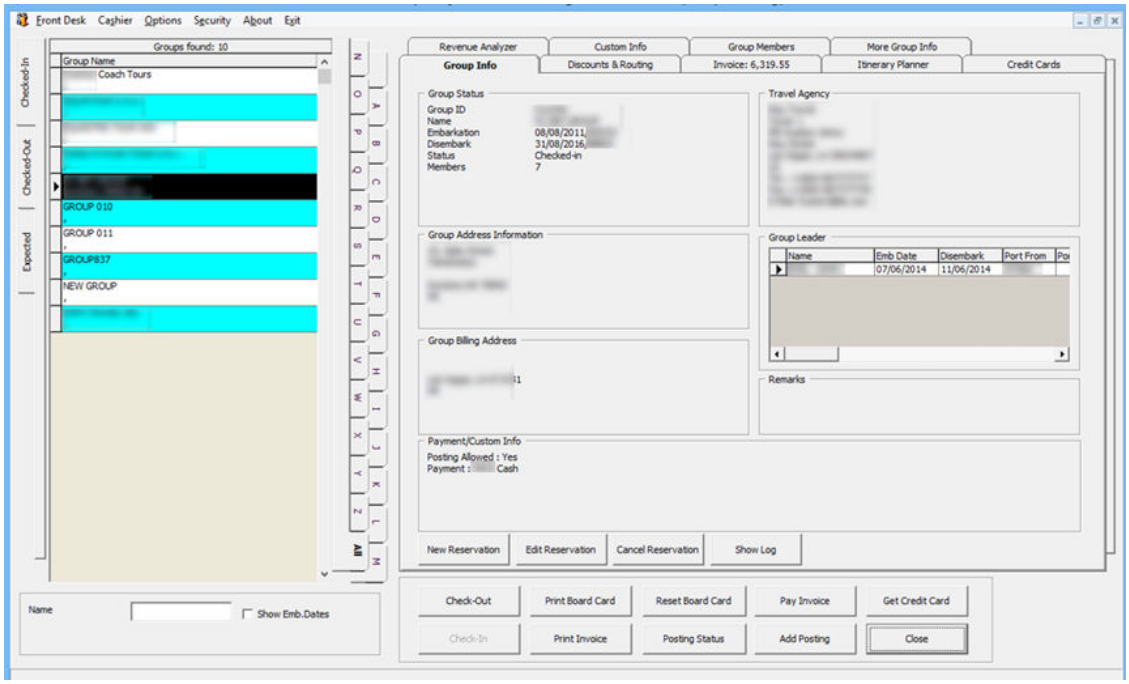
Setting an Inactive Account

An account can be enabled/disabled easily by deselecting **Posting Allowed** in the System Account Entry form. An Inactive Account has a Red Cross symbol in the Posting Allowed column in the System Account number grid.

Groups

Passengers travelling in a group can be easily identified by assigning a group ID and group leader to the parties. Apart from travelling together, these groups usually have a preset itinerary, other special arrangements, and a group billing account. These arrangements are set up and accessed from the **Management, Cashier, Groups** drop-down menu.

Figure 10-134 Group Handling



Group Info Tab

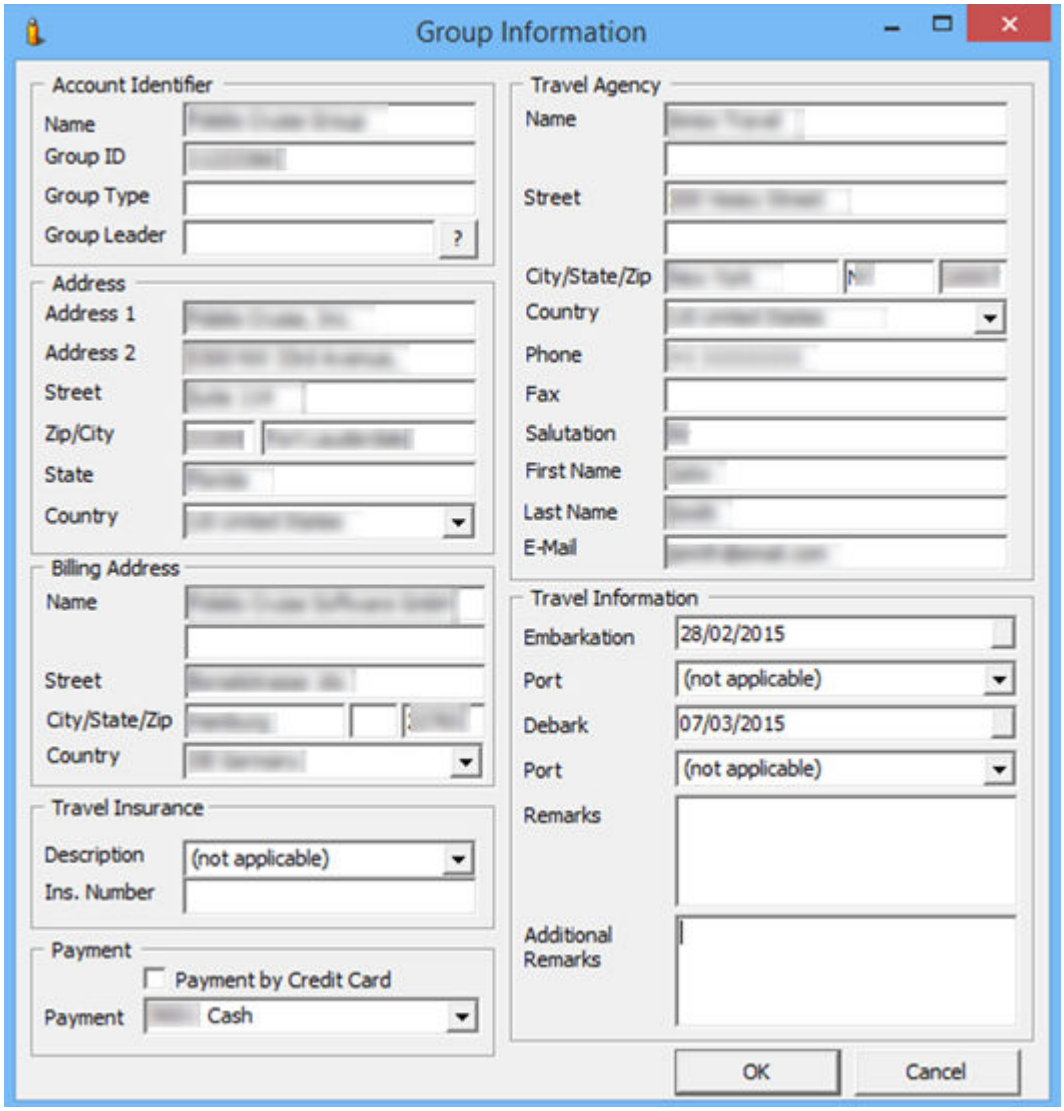
Information pertaining to the group is entered through the Group Info tab.

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Creating New Group Account

A group account containing a group ID, billing address, travel information, and payment type is created prior to adding its group members.

Figure 10-135 Group Information Window



1. Select the **Group Info** tab from the Group Handling window.
2. In the Group Info tab, click **New Reservation**.
3. In the Account Identifier section, enter the **Group name, Group ID, Group Type** and then select the **Group Leader**.
4. Insert all relevant information in **Address, Billing Address**, and **Travel Agency.**
5. In the Travel Information section, select the **Embarkation/Disembarkation Date** and **Port** from the drop-down list and then click **OK** to save.

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Editing a Group Account

1. From the Search panel, select the **Group Account** and then click the **Edit Reservation**.
2. Click **OK** to save the changes.

Cancelling a Group Account

1. From the Search panel,s select the **Group Account** and then click the **Cancel Reservation**.
2. At the Cancel Reservation prompt, click **OK** to reconfirm.

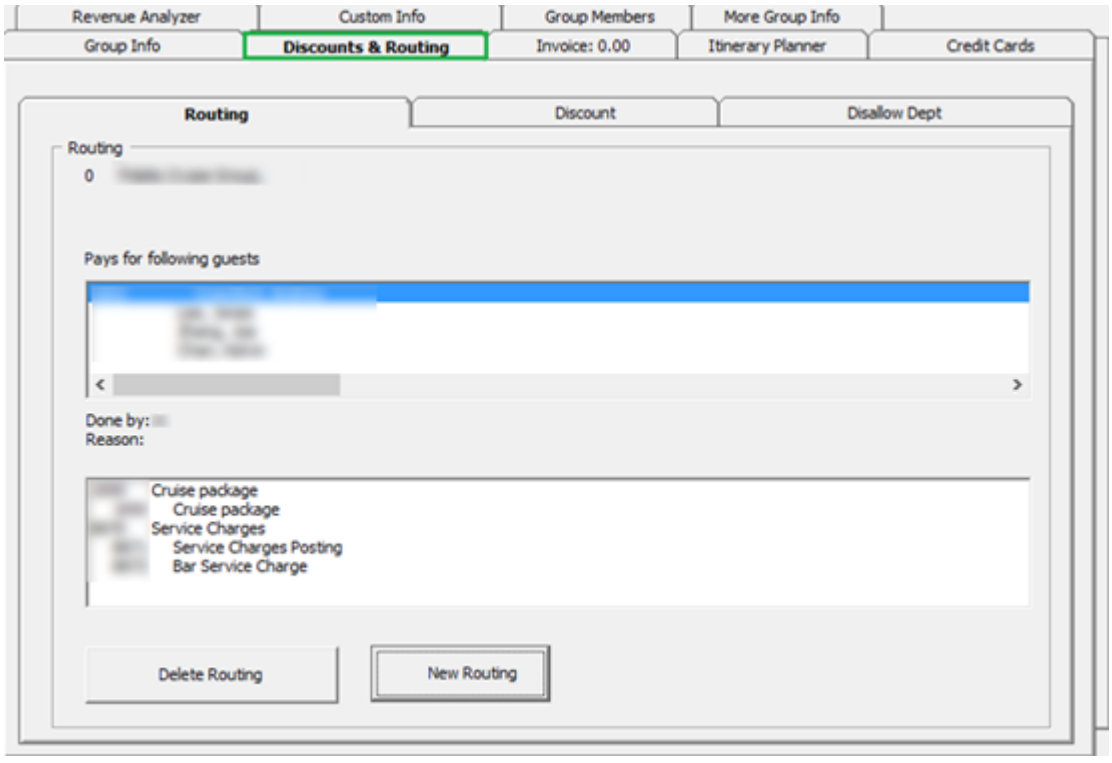
Discounts & Routing Tab

Special billing arrangements for the group such as Routing, Discounts, and Disallow Department are set up in the Discount & Routing tab.

Setting Up Group Routing

A routing can be set for the entire group members or individually from the group members list.

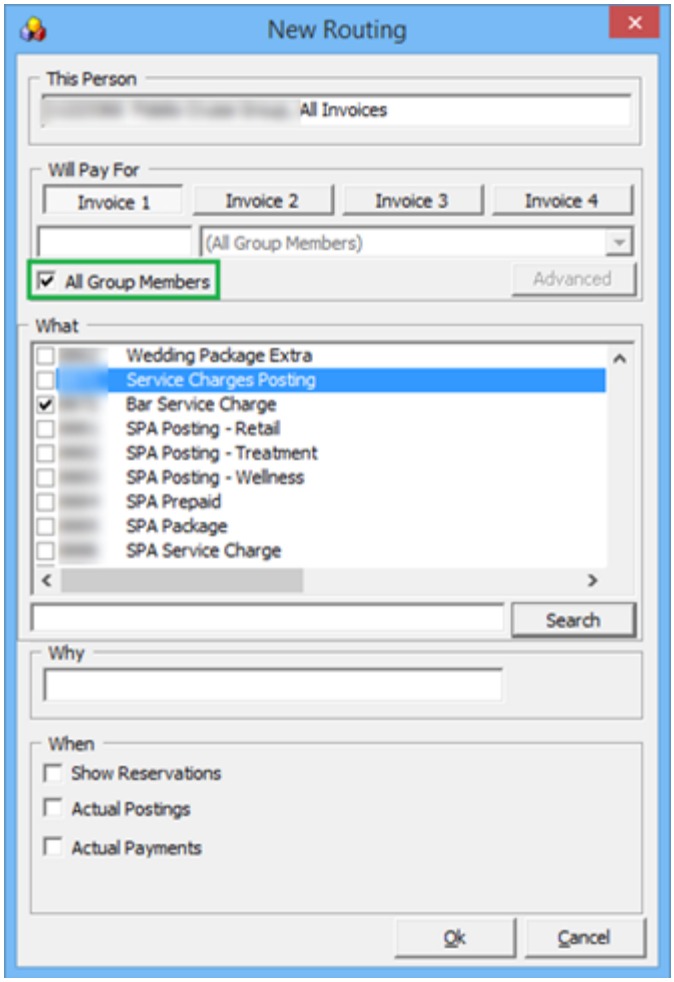
Figure 10-136 Discounts & Routing



1. Navigate to the Discounts & Routing tab and click **New Routing**.
2. In the Routing window, select the **Invoice** to route and select **All Group Members** to route all members, or click **Advanced** to select an individual.

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Figure 10-137 Group Routing



3. Select the department code to route and when to route the postings by checking the box beside the code.
4. Click **OK** to save the routing.

Setting up Discounts

Setting up Discounts

Discount set up in group account is identical to a guest discount. See Disc, Route, Pkg — SPMS Discount and MICROS Discount section for more details.

Setting Up Disallow Department

Disallow Department set up in group account is identical to Guest Disallowed Department. See Disc, Route, Pkg — Disallow Department for more details.

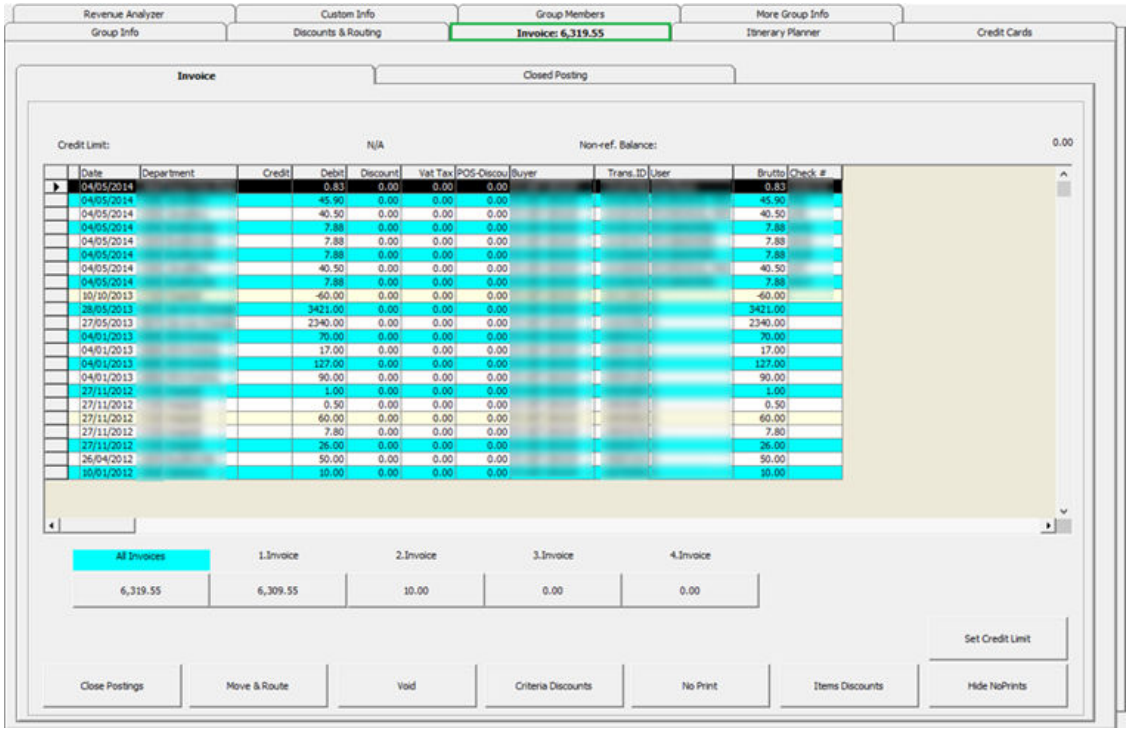
Group Invoice Tab

Unlike the Guest Invoice, the Group Invoice tab has two tabs: Invoice and Closed Posting. All Closed Postings appear in the tab.

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Functions within the Invoice tab works exactly the same as **Guest Invoice**. See Invoice Tab for more details.

Figure 10-138 Group Invoice Tab

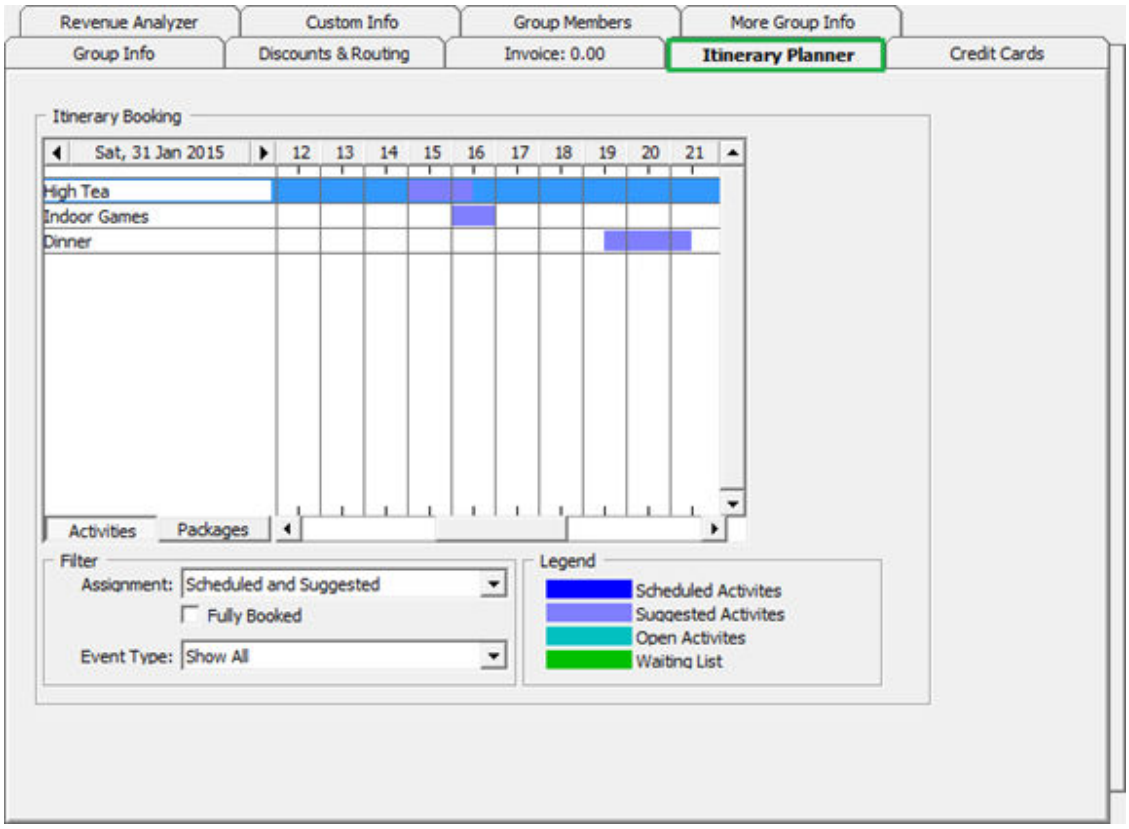


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Itinerary Planner Tab

The Itinerary Planner tab displays the Excursion, Dining arrangements, or any activities available to the Group. These activities are configured in the Administration Module, Itinerary Setup.

Figure 10-139 Itinerary Planner Tab



Viewing an Available Itinerary

1. Navigate to the Itinerary Planner tab.
2. In the Filter section, select the information to display from the **Assignment** and **Event Type** drop-down lists.
3. Information is shown by date in an hourly grid.

Group Credit Card

Registering a Credit Card in the Group Account is the same as Guest Handling, Get Card Function. See Get Credit Card Function for more information.

Group Members Tab

The Group Members tab lists all of the passengers who are linked to the Group ID. Member details are editable from this window.

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Figure 10-140 Group Members Tab

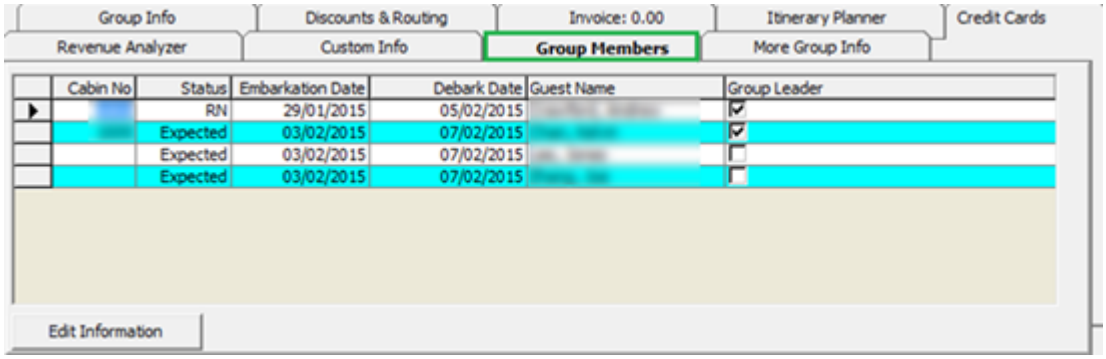


Table 10-35 Field Definition of Group Member Tab

Field	Description
Cabin No	Passenger cabin number.
Status	Booking status of the passenger.
Embarkation Date	Embarkation Date.
Debark Date	Debarkation Date.
Guest Name	Passenger name.
Group Leader	Group Leader of the group.

1. Select the group member name from the grid and then click **Edit Information**.
2. Edit all the relevant information in the Edit Information window, and then click **OK** to save and return to the Group Members grid.

Adding Reservation to Group Account

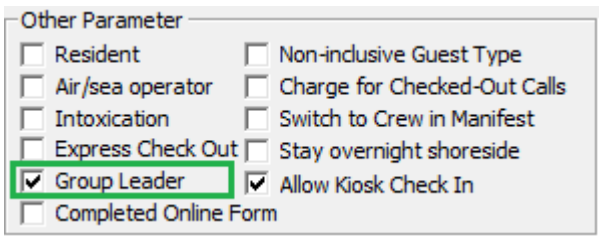
You can add/remove Reservations from the Group Account using the **Add to Group** and **Remove from Group** functions. Refer *Add to Group and Remove from Group* for more details.

Assigning a Group Member as Group Leader

You can assign a member of the group as a Group Leader, and the system permits more than one Group Leader.

In order to assign the passenger as group leader, select the **Group Leader** checkbox in the **Group Member** tab, or click **Edit Information** and select **Group Leader** in the Other Parameter section.

Figure 10-141 Group Leader Assignment



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Custom Info, More Group Info, Revenue Analyzer Tab

See Custom Info Tab, More Guest Info Tab and Revenue Analyzer Tab for handling these tabs.

Checking in Group Account

To route group members charges to the Group Account, you must first check-in the group account.

1. From the Expected tab of the Search panel, search for the group account.
2. Select the account and click the **Check In** button.
3. Select **Yes** at the Check-In Group prompt, and then click **OK** at the confirmation prompt.

Checking Out Group Account

A group account can only be checked out when the invoice is balanced.

1. Retrieve the group account from the Search panel, **Check Out tab** and then click the **Check Out** button.
2. At the Check Out prompt, select **Yes** to check out the account.
3. If the account is unbalanced, the system prompts for the invoice to be settled before proceeding. Click **OK** to return to the guest account.

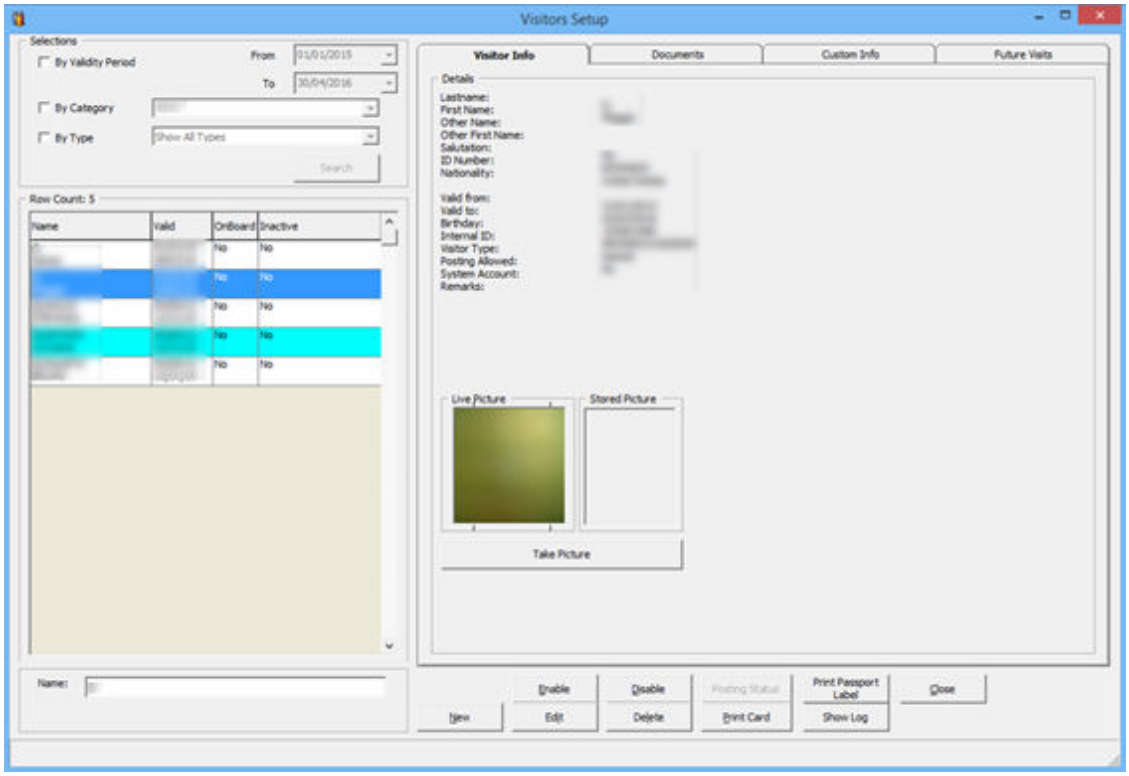
See Pay Invoice section for steps to settle an account.

Visitors

The Visitor function allows the Security Office and Gangway staff to enter visitor information, produce visitor passes and track whether the visitor is onboard or ashore. This function is accessible in the **Management module, Cashier, Visitor** drop-down menu.

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Figure 10-142 Visitor Setup Window

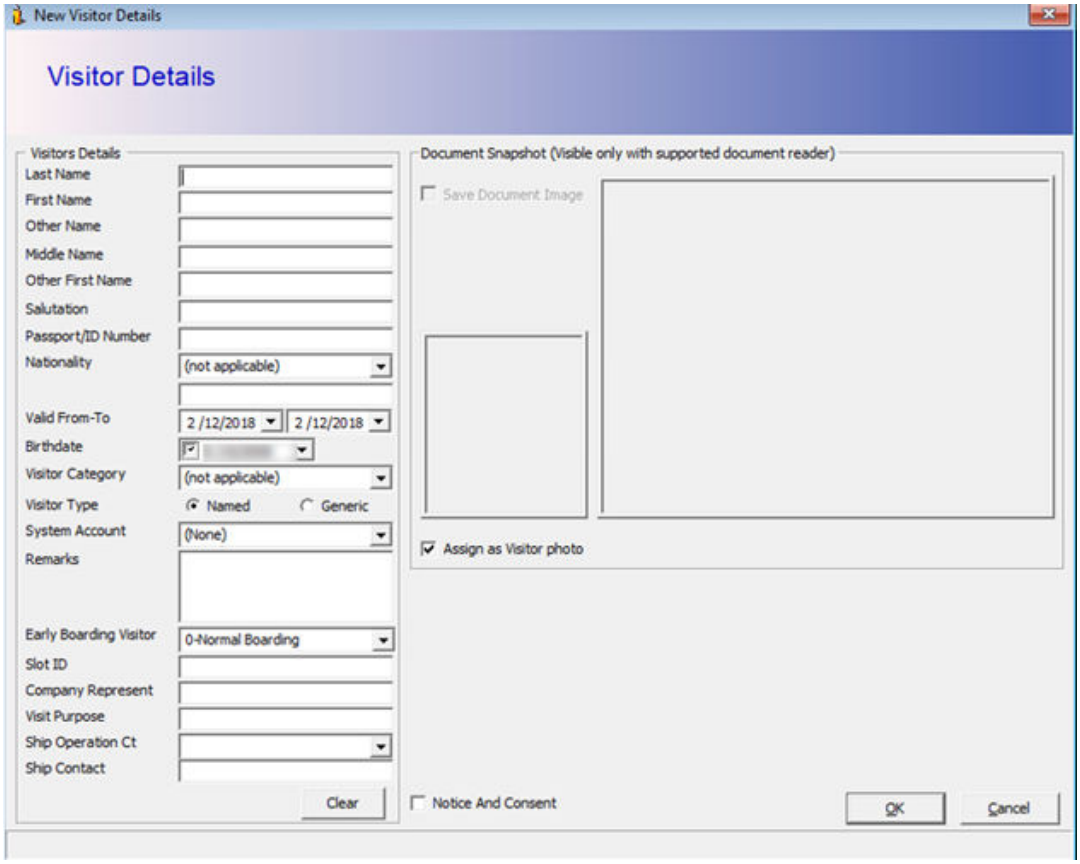


Adding New Visitor

1. Launch the function from the **Cashier, Visitor** drop-down menu.
2. In the Visitor Setup window, click **New** to open the New Visitor Details form.

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Figure 10-143 New Visitor Details Form



3. Enter the **Visitor's name** and **Passport ID**, select the **Nationality, Valid-From-To date, birthdate**, and **Visitor Category** from the drop-down list, and select the **Notice and Consent** checkbox.
4. Click **OK** to save the information.

Editing Visitor Information

1. Select the **Visitor** using the selection filters in the Visitor Setup window.
2. Click **Edit** to open the Visitor Details form.
3. Edit the relevant information and then click **OK** to save.

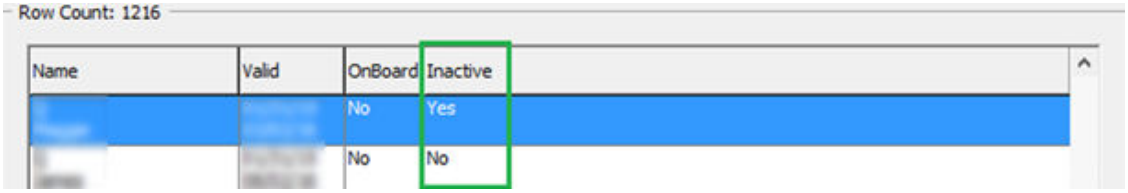
Enabling/Disabling a Visitor Account

Since the Visitor account does not have a cabin assigned or required to be check in/check out, the account is managed by setting the status as Active/Inactive in the Enable/Disable function.

1. Select the visitor name from the Visitor Account grid and click either **Enable** or **Disable**.
2. In the Disable Visitor prompt, click **Yes** to proceed.
3. In the Inactive column of the Visitor name grid, put the status of the visitor changes to Yes/No, depending on the selected option.

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Figure 10-144 Visitor Status



Changing Status to Onboard/Ashore

When a Visitor goes onboard/ashore, the Security Officer must set the visitor status as Onboard/Ashore to ensure all visitor movement is registered and accounted for.

1. Search the visitor name from the Visitor Setup window.
2. Double-click on the visitor name and select **Yes** at the Change Status prompt.

Scanning Travel Document

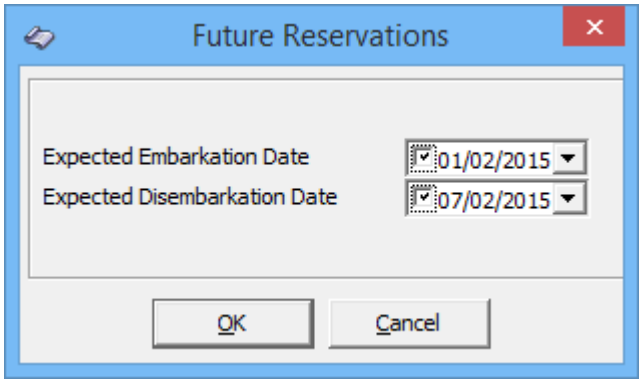
Not only must you register visitors going on-board, you must also scan and store their travel documents in the system. See Travel Documents Tab for steps to scan travel documents.

Adding Future Visit

You can add future visits for visitors visiting the Ship.

1. Search the visitor name from the Visitor Setup window, and then navigate to the **Future Visits tab**.
2. Click **New** and then enter the future embarkation/debarkation date in the **Future Reservations** window.

Figure 10-145 Visitor Future Reservations



3. Click **OK** to save the reservation.
4. The saved dates appear in the Future Visits tab grid.

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Quick Billing

The Quick Billing function is designed to expedite the check-out process during disembarkation, and enable invoices to be printed in batches using a filter. This function is accessible from **File Menu, Cashier, Guest Quick Billing**.

Figure 10-146 Quick Balance Selection Criteria

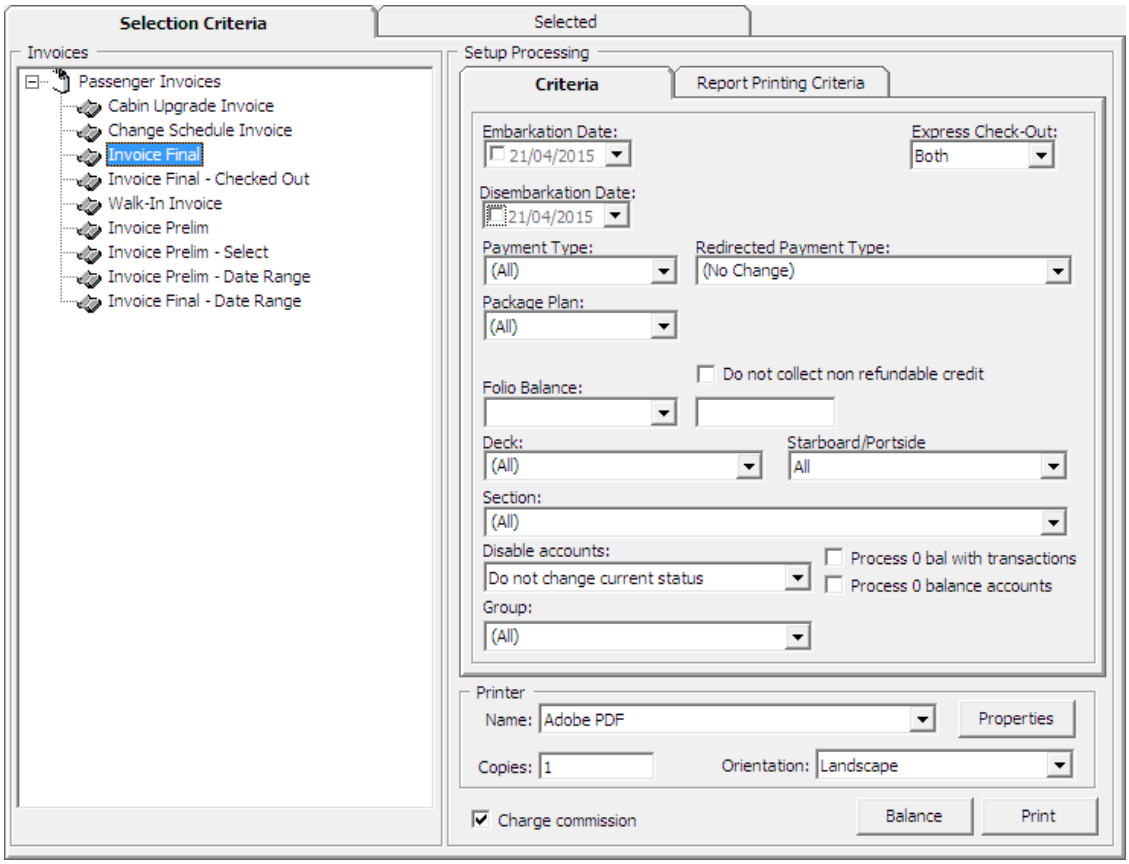


Table 10-36 Quick Balance Selection Criteria

Field	Description
Passenger Invoices	Type of invoice form.
Embarkation Date	Embarkation Date filter.
Disembarkation Date	Disembarkation Date filter.
Express Check Out	Select to include/exclude in Express Check-Out.
Payment Type	Payment type filter.
Redirected Payment Type	Redirect selected payment to another payment method.
Package Plan	Filter by Package Plan.
Folio Balance	Filter by folio balance, for example: greater than or equal to X value.

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Table 10-36 (Cont.) Quick Balance Selection Criteria

Field	Description
Do not collect non-refundable credit	Credit balance withheld for use in future cruise.
Deck	Invoice sort order by deck.
Starboard/Portside	Invoice sort order Starboard/Portside.
Section	Invoice sort order by section.
Disable accounts	Update account status to "allow manual postings only" or "blocked all postings"
Process 0 bal with transactions	Include guests that have already settled in full and allow a reprint of the invoice in Quick Billing window.
Process 0 balance accounts	Include 0 balance accounts with/without transactions.
Group	To include Group Account.
Printer	Printer assigned for invoice printing, number of copies to print and print orientation.
Charge Commission	Define whether applicable commission applies when balancing the accounts.

Figure 10-147 Quick Balance Selected Tab

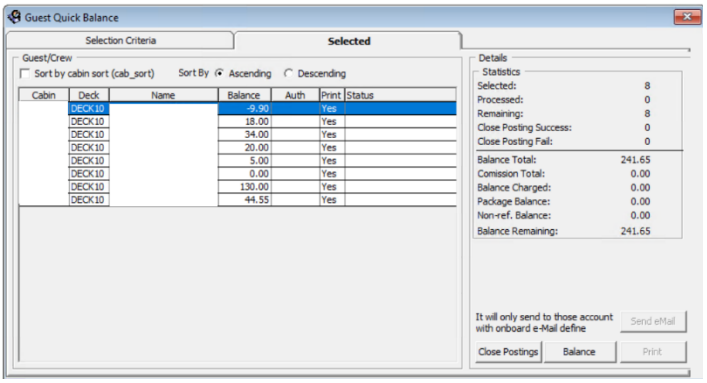


Table 10-37 Field Definition of Guest Quick Balance

Field	Description
Cabin	Cabin number.
Deck	Location of Cabin.
Name	Guest Name.
Balance	Total Invoice Balance.
Auth	Authorization Status.
Print	Invoice Printed status.
Status	Close Posting status or Invalid Address validated during Balance process.

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Table 10-37 (Cont.) Field Definition of Guest Quick Balance

Field	Description
Statistics	Indicator count of selected, processed, and remaining accounts and close posting - successful/fail with its value is in balance or charged.
Send eMail	Invoices are emailed to guest on-board email account.
Close Postings	Set invoice postings to close.
Balance	Process balancing for selected accounts.
Print	Print invoices for selected accounts.

Quick Bill E-Invoices Printing

The Print E-Invoices enables you to print and save E-Invoices in PDF format, which can be later transferred to Shoreside through Fleet Management System - OHC Sender and OHC Receiver functions

1. Follow steps 1 to 4 of Quick Bill Balance. If no printer is assigned, the system disables the **Print E-Invoices** feature
2. Navigate to the selected tab
3. Without balancing the invoice, click **Print E-Invoices**
4. At the Quick Printing prompt, click **Yes** to proceed

Guest Quick Billing

Quick Bill Printing

The Selection Criteria tab in the Guest Quick Billing function determines the type of invoices to print/pay based on the criteria chosen for all disembarking passengers, for example, passenger paying by credit card or only guest with x outstanding amount.

1. From the Cashier file menu, select **Guest Quick Billing function**.
2. In the Guest Quick Balance window, select an **invoice type, Embarkation Date, Disembarkation Date, Payment Type, Folio Balance** (if applicable), **Deck**, and **Section**.
3. In the Printer section, select an **invoice printer**, enter the **number of copies** to print, select the print orientation, and click **Print**.
4. In the Quick Printing prompt, select **Yes** to continue.

Quick Bill Balance

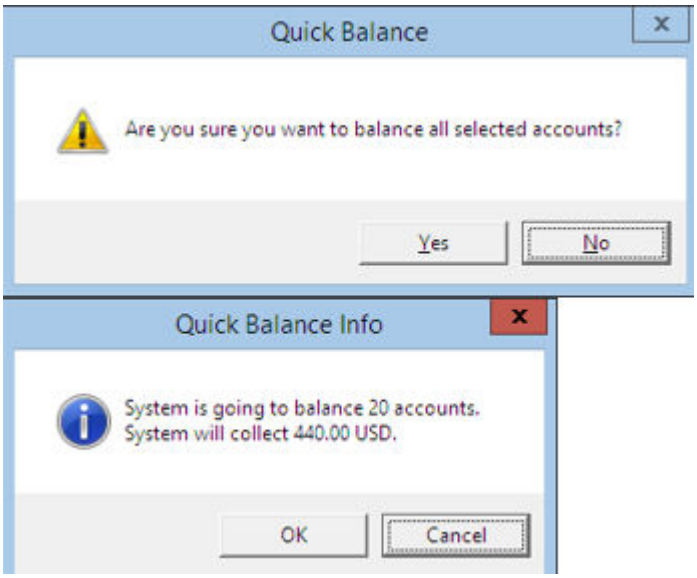
Other than printing invoices by batch, balancing the passenger account is possible if there is a credit card on file.

1. Repeat steps 1 to 3 of the above.
2. In the **Disable accounts** field, select the appropriate Posting status from the drop-down list.

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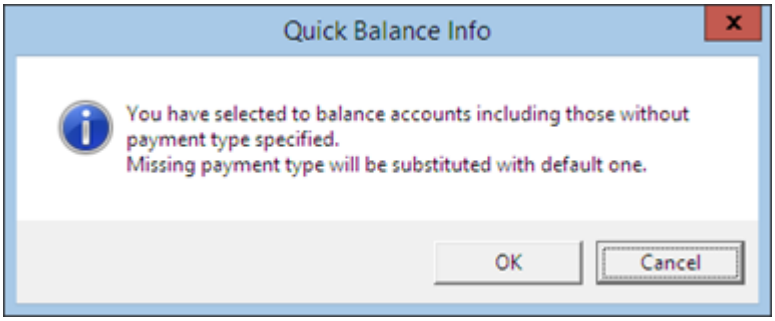
3. Navigate to the Selected tab to verify the result, and adjust the selection until the desired result is achieved.
4. To exclude a passenger from the search results, right-click on the **name** and then click **Remove**. Once the passenger is removed, the statistic count updates accordingly.
5. At the Confirmation prompt, click **Yes** to confirm and then click **Balance**.
6. Click **Yes** at the Quick Balance prompt, then click **OK** at the Quick Balance Info prompt.

Figure 10-148 Quick Balance Info Prompt



7. In the Quick Balance Info warning prompt, *read the warning*, and then click **OK** to proceed.

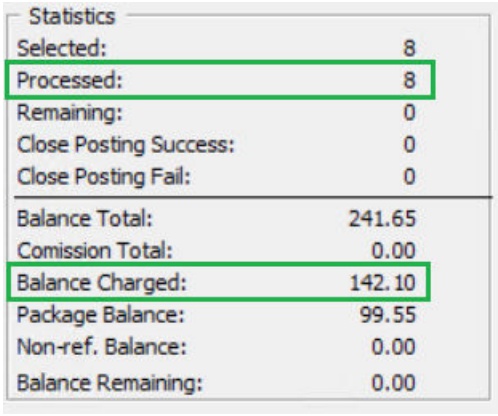
Figure 10-149 Quick Balance Info on Balance



8. The total charged value and number of accounts processed are shown in the Statistic section once the account is balanced successfully.

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Figure 10-150 Statistic of Account Processed and Value Charged



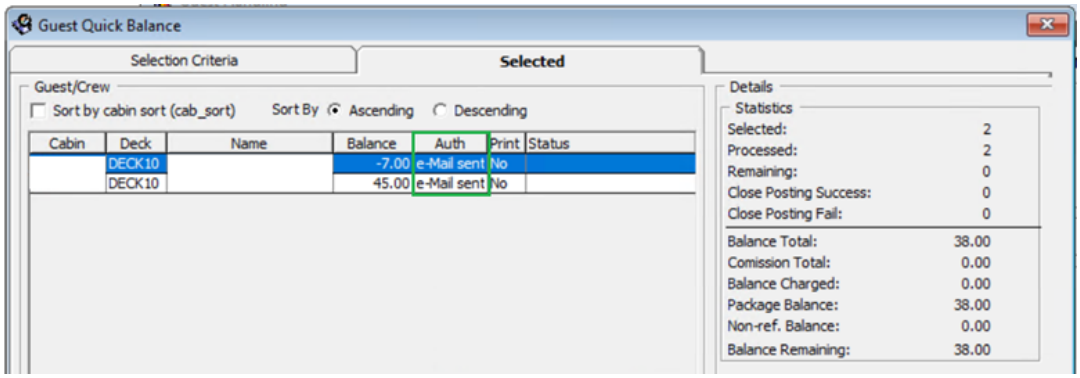
9. Click the **Close Postings** to flag the posting as close.

Quick Bill eMail

Passengers or crew members that haves on-board email accounts can opt to receive copies of their invoices by email. This function is controlled by a parameter. Consult your IT Department for setup if this capability requires configuration.

1. See steps 1 to 4 of Quick Bill Balance. If no printer is assigned, the system disables the **Send eMail** feature.
2. Navigate to the Selected tab and click **Send eMail**.
3. Without balancing the invoice, click **Send eMail**.
4. At the Quick Printing prompt, click **Yes** to proceed. An “e-Mail sent” status is added to the Auth column when the invoice is successfully sent.

Figure 10-151 Invoice Successfully Emailed Indicator



Quick Bill Balance with Commission

The Quick Bill Balance with Commission feature enables you to charge credit card commissions at the point of balancing the passenger account. By default, the Charge Commission is selected in the Criteria Selection tab, and the commission values are then calculated by the system based on the pre-defined commission linked to the Financial Department — Credit.

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1. Perform steps 1 to 4 from the Quick Bill Balance section above.

> **Note**
>
> To exclude a commission charge for certain payment type, filter using the Payment type and deselect the Charge Commission checkbox.

2. Navigate to the Selected tab to verify the results and adjust the selection until you achieve the desire results. The chargeable commission appears in the commission column.
3. To exclude a passenger from the search results, right-click on the name and click **Remove**.
4. Click **Balance** to proceed.
5. In the prompt, click **OK** and note each prompt message before proceeding to the next.
6. In the Statistic section, the total value charged and number of accounts processed get updated.
7. Click **Close Postings** flag the posting as close on these accounts.

Residents Quick Billing

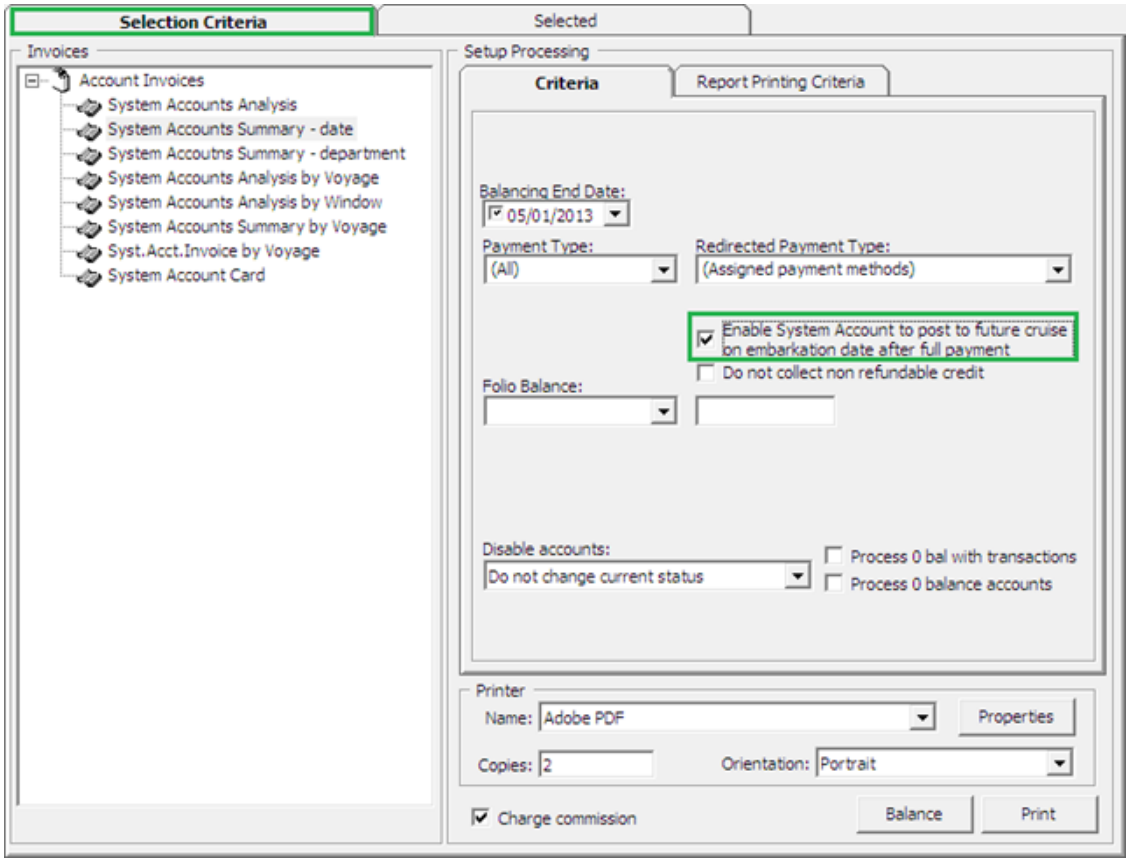
The Residents Quick Billing function is the exact same function as Guest Quick Billing with the exception that it only filters the Residents accounts instead of passengers. Those accounts must have a check mark in the Residents field in **Edit Information, Other Parameter Resident**.

System Accounts Quick Billing

System Accounts Quick Billing is a process that *only* balances the System Accounts and has lesser criteria to select from than Guest Quick Billing.

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Figure 10-152 System Account Quick Billing



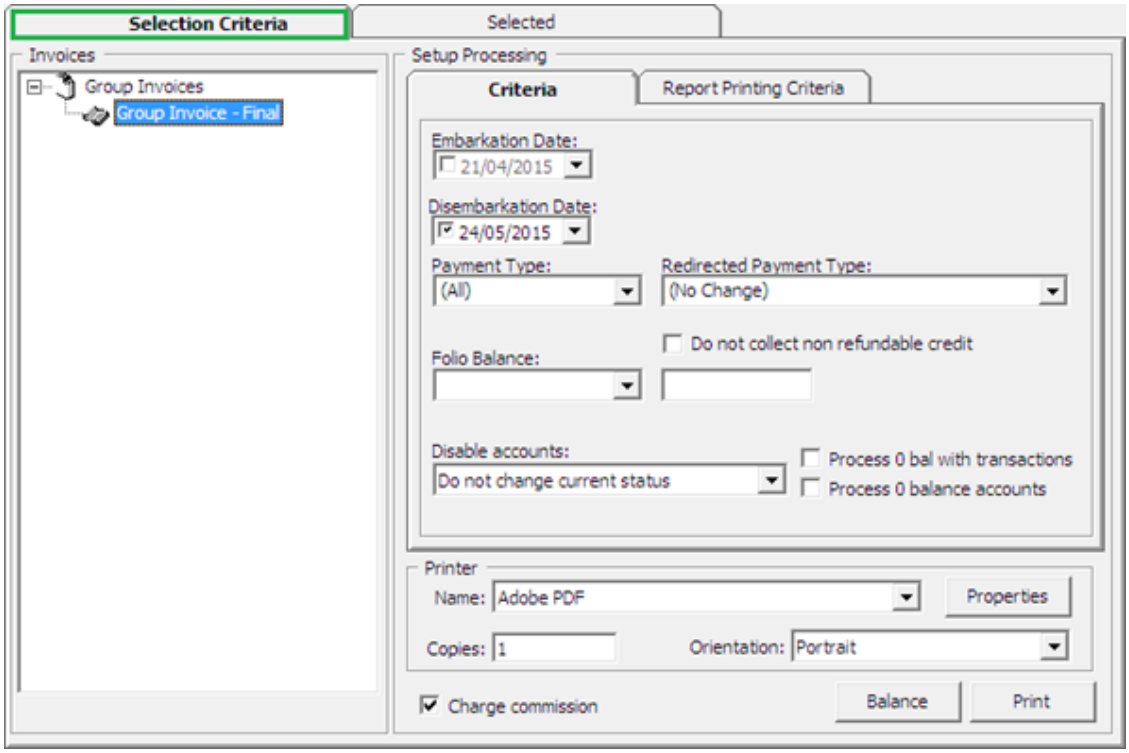
1. From the Cashier file menu, select the **System Account Quick Billing** option.
2. In the Invoices section, select the **Invoice format**, then navigate to the Criteria tab and select **Balancing End Date, Payment Type, Folio Balance**, if any.
3. If Enable System Account to post to future cruise on embarkation date after full payment is selected, all postings posted after the invoice is fully paid are recorded in the next cruise.
4. In the Printer selection, select ans invoice printer, enter the number of copies to print and the print orientation, and click **Print**.
5. Perform steps 3 to 9 of Quick Bill Balance.

Group Quick Billing

The Group Quick Billing function is similar to Guest Quick Billing, and only filters the Group Account, excluding all group members.

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Figure 10-153 Group Quick Billing Window



Perform steps 1 to 9 of Quick Bill Balance.

Quick Postings

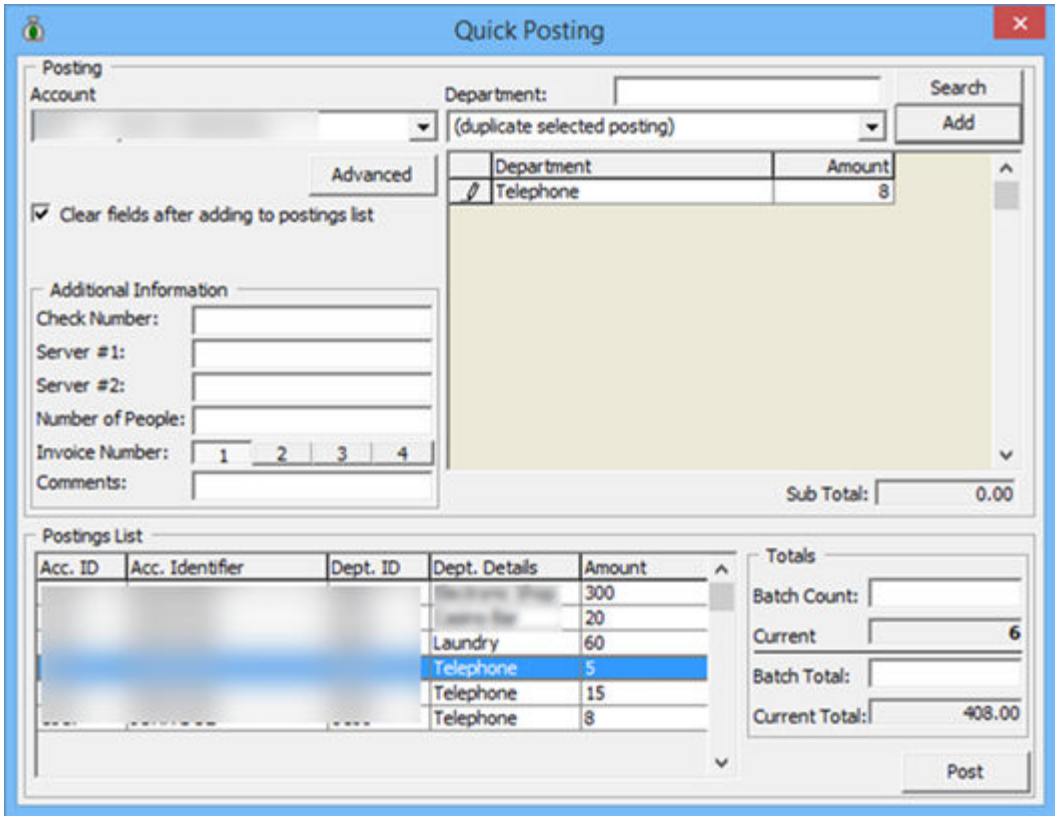
The Quick Postings function allows you to perform postings by batch to a single account or multiple accounts.

Quick Posting to Single Account

This function is extremely useful when you have a large quantity of guest checks to post at a time, for example Laundry or Telephone. The function applies to Guest, Crew, Group, and System Accounts.

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Figure 10-154 Quick Posting Window



1. From the Cashier File menu, select the **Quick Posting** option.
2. Select the **Account** using the drop-down list, navigate to Department, select the **department code** and enter the value to post.
3. In the Additional Information section, insert the **check number, Server#1**, if any, and select the invoice number to post to. The System default Invoice is 1.
4. Click **Add** to add the account to the Posting List grid. Repeat step 3 until all checks are added to the Posting List.
5. Note and tally the current count and current totals with physical guest checks.
6. Click **Post** to confirm the posting.

Quick Posting to Multiple Account

Quick Posting to Multiple Account allows you to post transactions to many Guest, Crews, Group, and System Accounts.

1. From the Cashier menu, select the **Quick Posting** option.
2. Under the Account field, click **Advanced**.
3. In the Multiple Accounts selection window, select the **Status** and **Account Type** from the drop-down list.
4. Select the account name from the Non Selected Accounts pane, and then click **Add** to add the account singly or **Add All>** to add all account listed or use the **Criteria Add>**. *See next section to select accounts using Criteria Add*.

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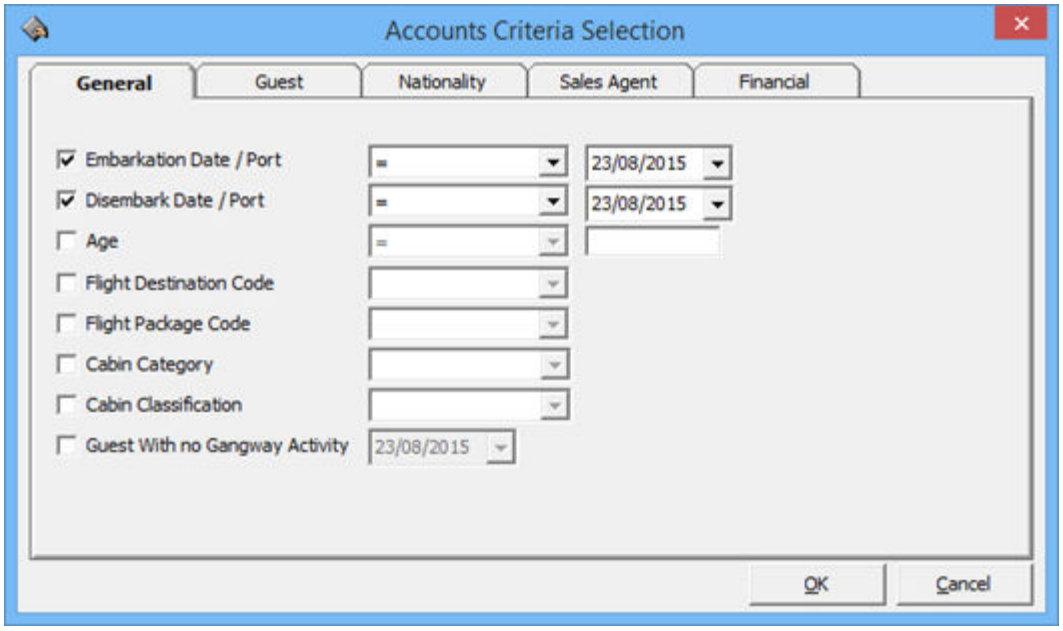
5. The account selected are shown in the Selected Account.
6. Click **OK** to return to the Quick Posting window.
7. Navigate to the Department field, select the **department code**, and enter the value to post.
8. In the Additional Information section, insert the **Check number, Server#1**, if any, and select the invoice number to post to. The System default Invoice is 1.
9. Click **Add** to add the account to the Posting List grid.

Selecting Account Using Criteria Option

The criteria options are made available to further filter the accounts based on the criteria entered, for example by embarkation/disembarkation date, cabin category, VIP status, nationality, and so on.

1. In the **Multiple Accounts Selection** window, click **Criteria Add>**.
2. Select the **options** from the drop-down list in the General tab, then navigate to the Guest tab.

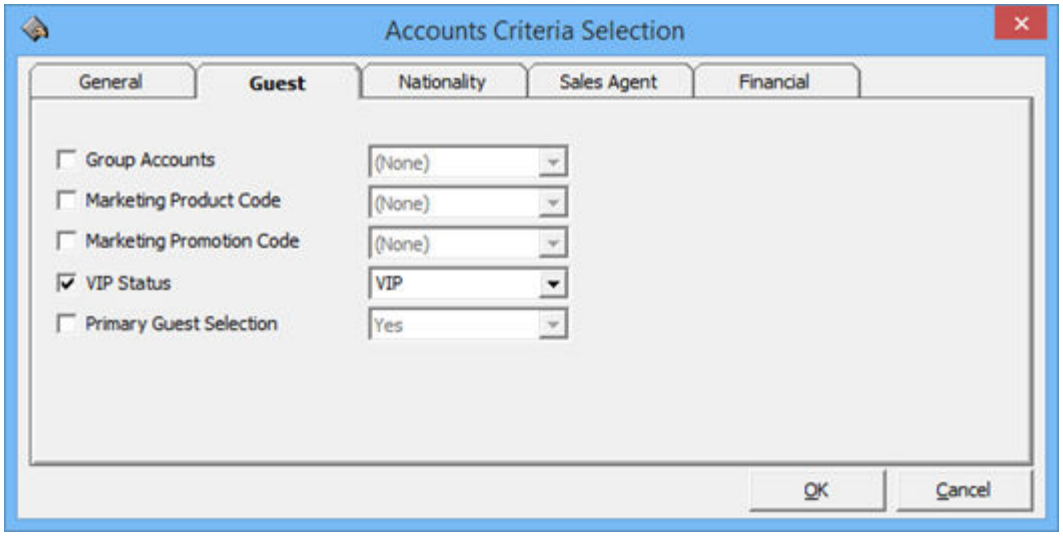
Figure 10-155 Account Selection Criteria



3. In the Guest tab, select from the available **options** using the drop-down list, continue to select from the remaining tabs if required, and then click **OK** to return to the Multiple Account Selection window.

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Figure 10-156 Account Selection Criteria — Guest

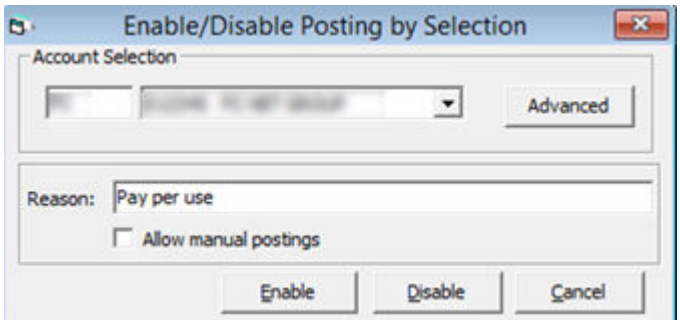


> **Note**
>
> Tabs in Accounts Criteria Selection may vary depending on the Guest Type selected in the Multiple Account Selection window.

Quick Posting Status

Quick Posting Status allows you to Enable/Disable the account posting status by batch.

Figure 10-157 Enable/Disable Posting Selection



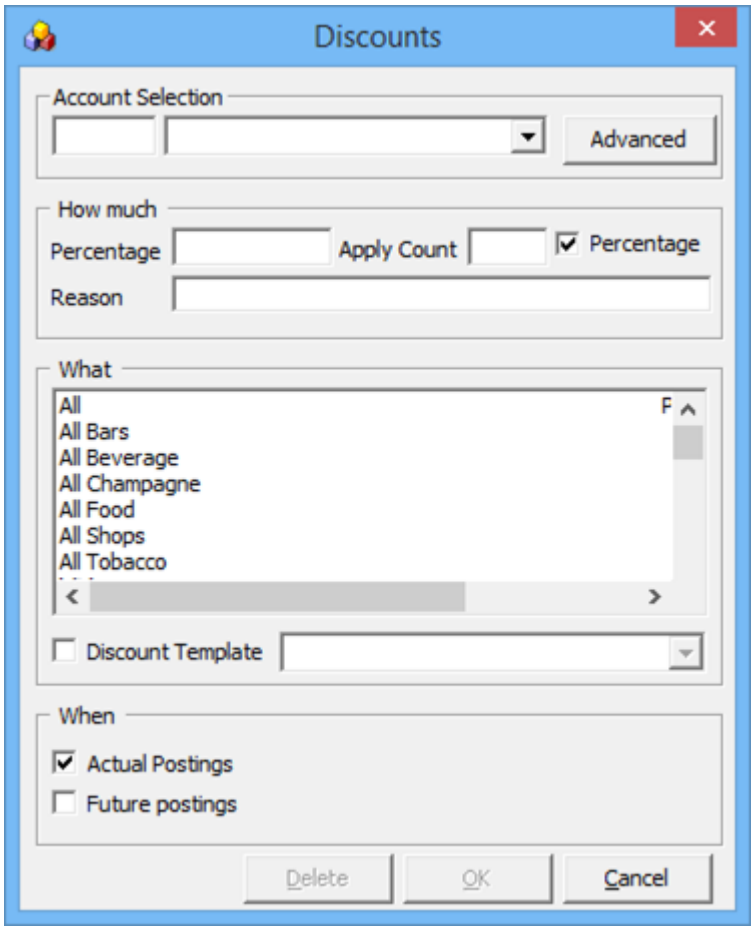
1. From the Cashier File menu, select **Quick Posting Status** from the drop-down list.
2. In the Enable/Disable Posting by Selection window, select the account from the drop-down list or click **Advanced** to select multiple accounts.
3. Insert a **reason** in the Reason field.
4. Select **Allow manual postings** if manual posting is allowed in Disabled accounts.
5. Select one of the option - Enable or Disable the account.

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Quick Discount

Quick Discount allows you to set up discounts for multiple passenger accounts using the available selection criteria — by percentage or value. See Invoice Tab, Item Discount for discount assignment to individual passengers.

Figure 10-158 Quick Discount Window

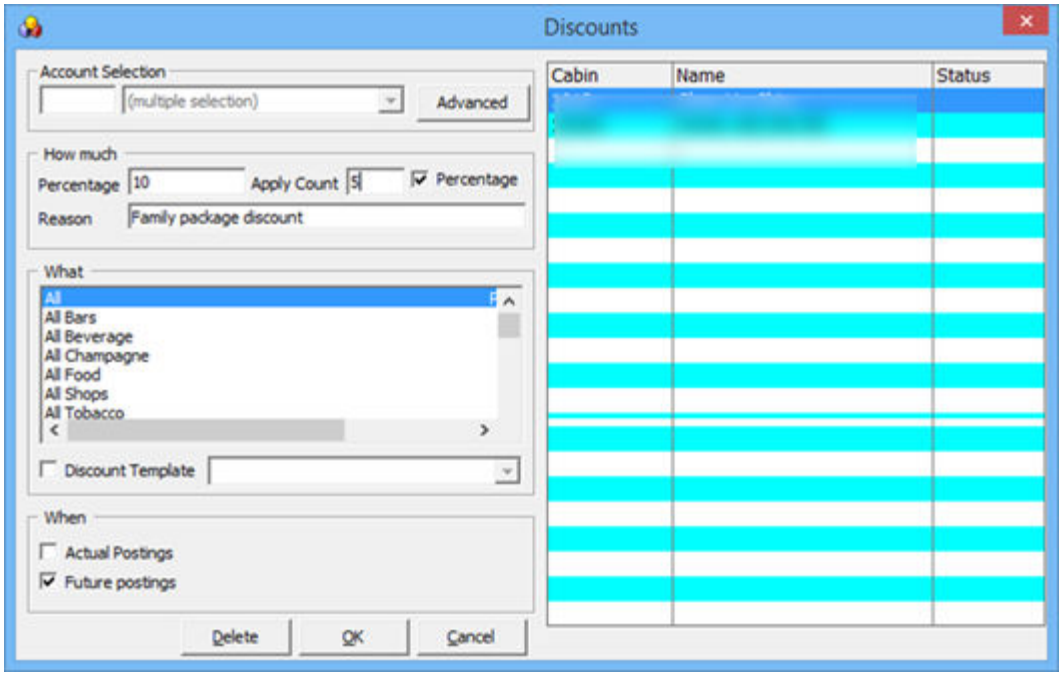


Quick Discount to Multiple Guest by Percentage/Value

1. From the **Cashier File** menu, select **Quick Discount** option.
2. Repeat steps 2 to 5 of Quick Posting of Multiple Account, and click **OK** to return to Discounts window.

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Figure 10-159 Quick Discount to Multiple Account



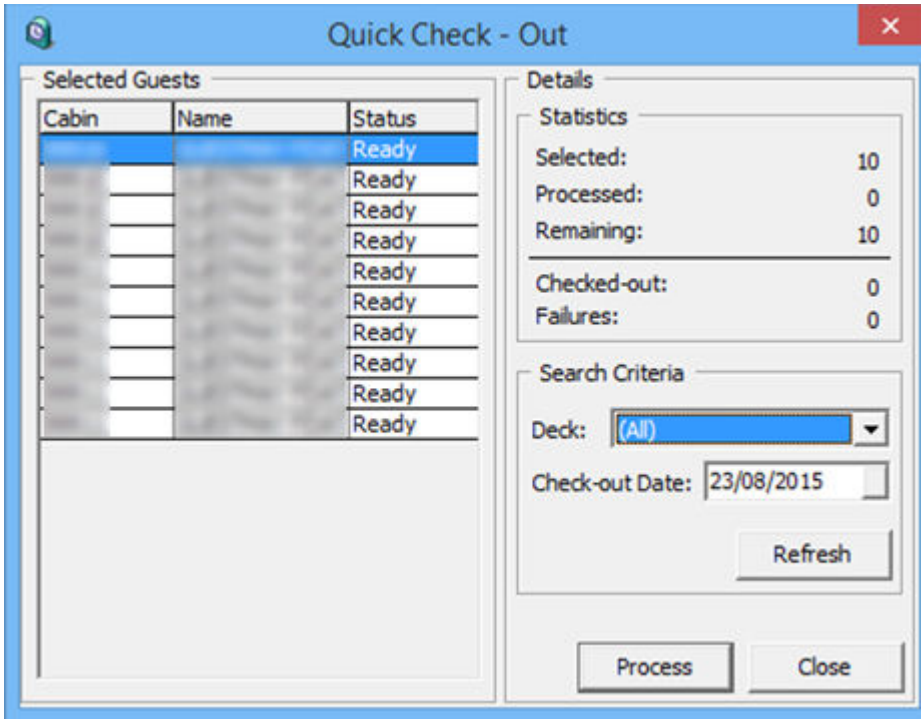
3. In the Discounts window, How much section, enter the **percentage value, number of applicable discounts**, and **reason**. To apply a Value discount, deselect the **Percentage** checkbox.
4. In the What section, select the **department group** or **code** the discount is applicable to, and click **OK** to confirm.

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Quick Check-Out

Quick Check-Out allows you to check-out passenger's by Deck and selected Check-out Date.

Figure 10-160 Quick Check Out



1. From the Cashier File menu, select the **Quick Discount** option.
2. Repeat steps 2 to 5 of Quick Posting to Multiple Account and click **OK** to return to the Discounts window.
3. At the Selected Guest section, the cabin number and name of passengers due to check-out appear. The total selected accounts appears in the Statistic section.
4. Click **Process** and then select **Yes** at the confirmation prompt to proceed. This updates the number of records processed and its status in the Statistic section.
5. Click **Close** to return to the Main Window.

Quick Service Charge Posting

The Quick Service Charge Posting is a function that posts service charges in bulk or individually based on the criteria set up in the Quick Edit tab.

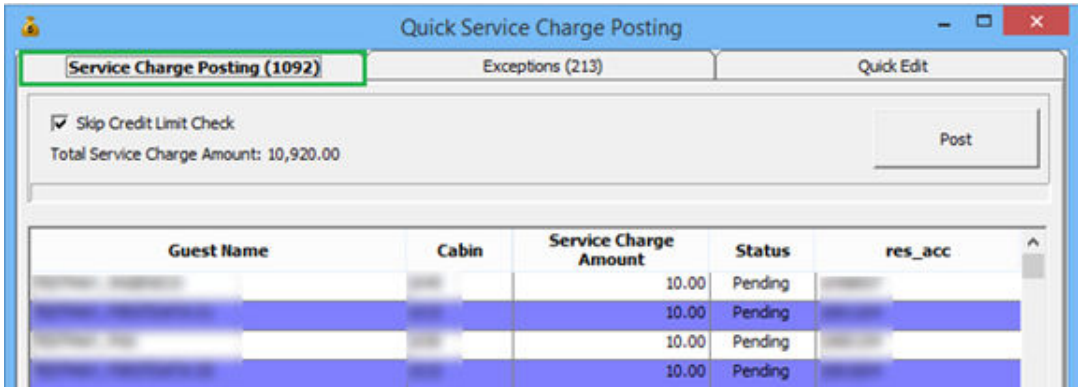
Posting a Service Charge by Batch

1. From the **Cashier File** menu, select the **Quick Service Charge Posting** option and navigate to the Quick Edit tab.
2. In the Guest Selection section, click **Advanced** to open the Multiple Account Selection window.

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3. In the Multiple Accounts Selection window, select the **Status** and **Account Type** from the drop-down list.
4. Select the **account name** from the Non Selected Accounts pane, and click **Add** to add the account singly or **Add All>** to add all accounts listed or used in the **Criteria Add>**.
5. Accounts selected appear in the Selected Account.
6. Select **Post the following amount daily**, select **Use System Default Value**, or manually enter the value in the field next to it if the value is different.
7. Click **Update** to update the service charge value. The information appears in Guest Handling, Guest Info, and Cabin Information section.
8. Navigate to the Service Charge Posting tab to review the accounts with service charges pending.

Figure 10-161 Service Charge Posting



9. Click **Post** to post the service.

> **Note**
>
> By default, the **Skip Credit Limit Check** is selected, allowing the system to post the service charge even when the account exceeds the credit limit.

10. In the confirmation prompt, click **Yes** to the value of the service charge to post.

Disabling Service Charge Posting

1. Repeat above steps 1 to 5.
2. Select **Disable Service Charge Posting**, and click **Update**.
3. Updated accounts appear in the **Exception tab and** and Guest Handling, Guest Info, and Cabin Information sections.

Quick Messages

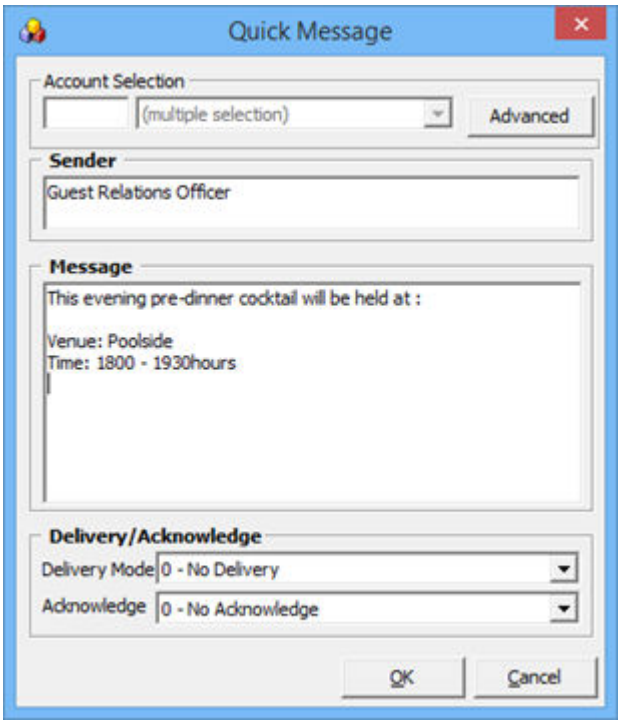
The Quick Message function allows you to send messages to a group of passengers or individually using the Advanced Selection.

1. From the Cashier File menu, select the **Quick Messages** option.
2. In the Quick Message window, click **Advanced** to open the Multiple Account Selection window.

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3. In the Multiple Accounts Selection window, select the **Status, Account Type** from the drop-down list.
4. Select the **account name** from the **Non Selected Accounts** pane, and then click **Add** to add the account singly or **Add All>** to add all accounts listed or use the **Criteria Add>**, and click **OK** to return to Quick Message window.
5. In the Quick Message window, enter the **Sender's name** and **message** content.
6. Select the **Delivery Mode** and **Acknowledge mode** from the drop-down list, and click **OK** to save.
7. The system places a check mark in the guest account in Guest Handling, Message tab as an indicator for undelivered messages.

Figure 10-162 Quick Message Form

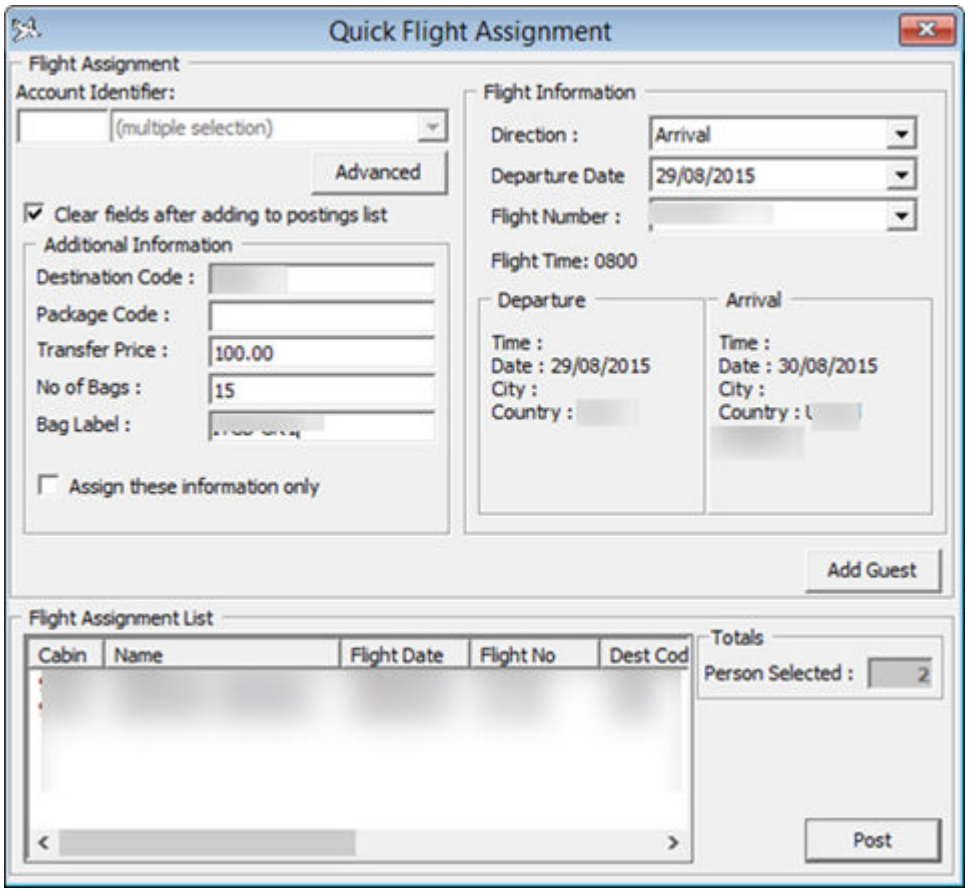


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Flight Assignment

The Flight Assignment function is similar to Quick Billing and Quick Posting. This function enables you to assign arrival or departure flight individually or by a group of passengers.

Figure 10-163 Quick Flight Assignment



Assigning Flight Details

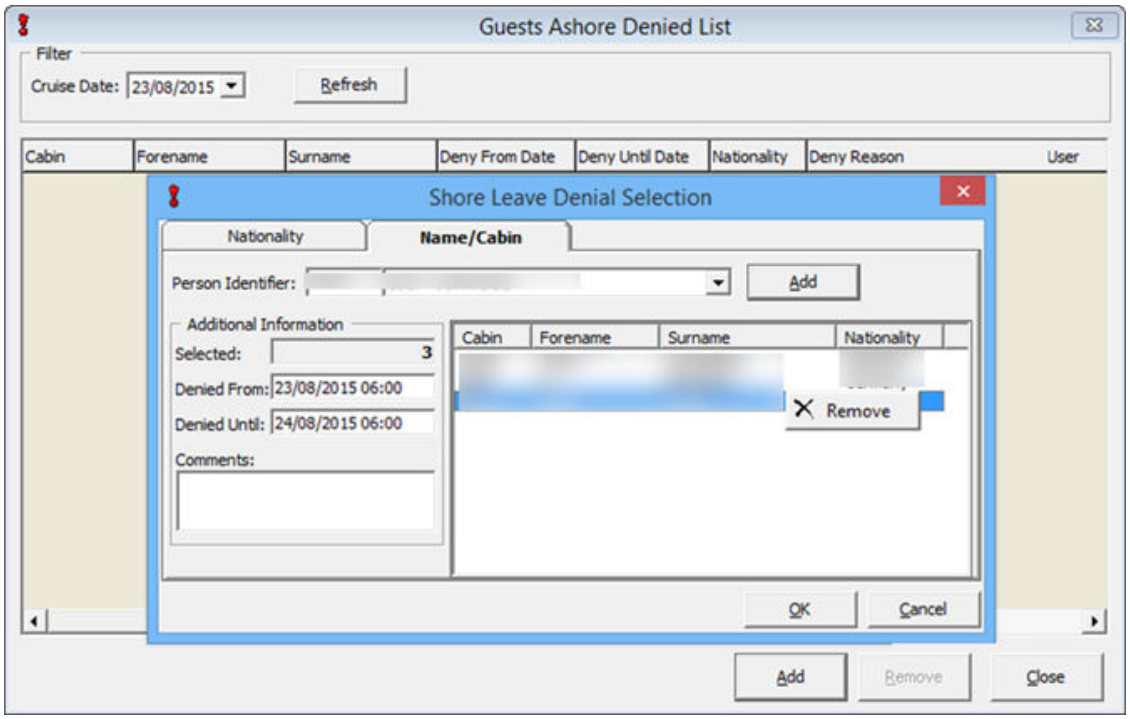
1. From the Cashier File menu, select the **Flight Assignment** option.
2. Enter the account in the **Account Identifier** field or click **Advanced** to select Multiple Accounts.
3. Navigate to the Flight Information section and select the **Direction, Departure Date, Flight Number** from the drop-down list.
4. In the Additional Information section, enter additional **information**, if any.
5. Click **Add Guest** to add the selected guest to Flight Assignment List, and take note of the Total count beside the Flight Assignment List grid.
6. Click **Post** to update the flights assignment into the guest account in Guest Handling, Other Info tab.

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Ashore Deny List

The Ashore Deny List is a function that manages passengers or crew movements by denying certain passengers or crew members from going ashore.

Figure 10-164 Ashore Deny List



Denying Passengers from Going Ashore

1. From the Cashier File menu, select the **Ashore Deny List** option.
2. Select the **Cruise Data** from the drop-down list and click **Refresh**.
3. Click **Add** at the Guests Ashore Denied List to open the Shore Leave Denial Selection window.
4. Navigate to either the Nationality or Name/Cabin tab, and select the **nationality or cabin** from the drop-down list.
5. Click **Add** to add the selected passenger(s) to the denied list grid.
6. To remove the name from the Denied List grid, right-click on the name and select **Remove**.
7. Select the **Denied from/until date**in Additional Information section and click **OK** to return to the Guest Ashore Denied List. All Denied passengers name are highlighted in Red on Gangway Log.
8. Click **Close** to return to the main window.

Removing Passenger from Going Ashore List

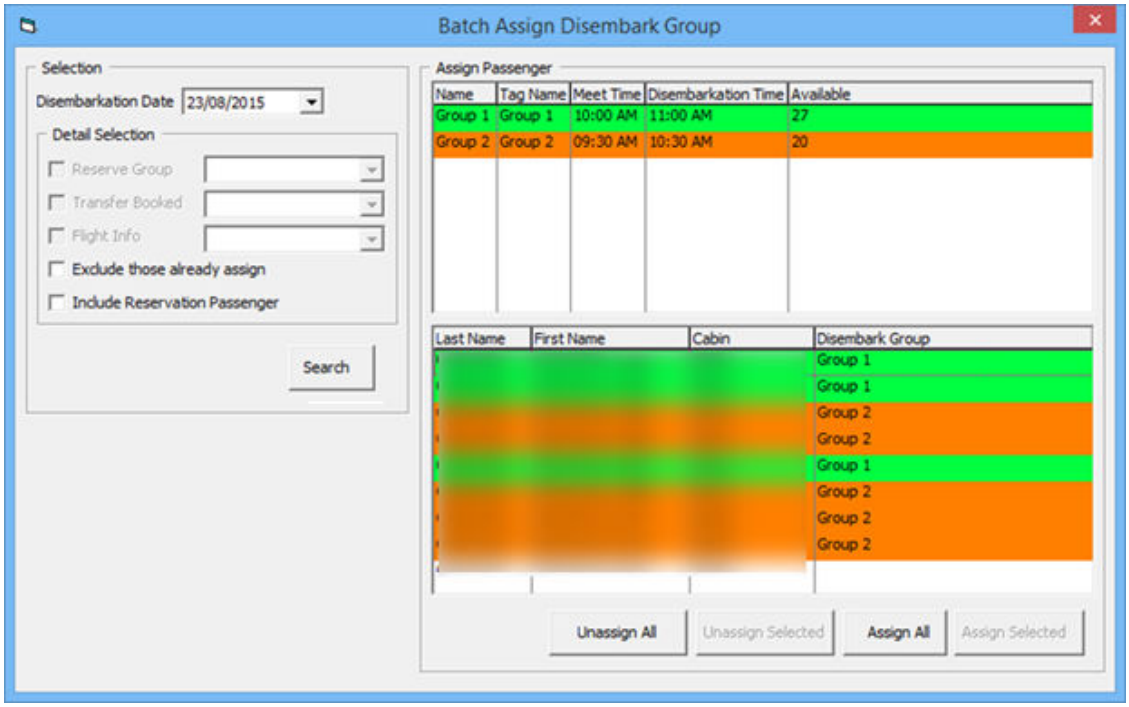
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1. Perform steps 1 and 2 from the Denying Passengers from Going Ashore steps above.
2. In the Guests Ashore Denied list, select the **name** from the grid and click **Remove**.
3. Select **Yes** at the confirmation prompt and then click **Close** to return to the main window.

Batch Assign Disembark Group

The Batch Assign Disembark Group function is similar to Add to Disembark Group in Guest Handling. This function enables you to organize disembarking passengers by batches.

Figure 10-165 Batch Assign Disembarking Group



Assigning Passengers to Disembarkation Group

1. From the Cashier File, select the **Batch Assign Disembark Group** option.
2. Select the **Disembarkation Date** from the drop-down list.
3. In the Detail Selection section, select the **appropriate option** and click **Search**.
4. Select the **Group** in the Assign Passenger section and then select the **passenger name/ cabin**. Use the **CTRL+key** to select multiple passengers.
5. Click **Assign Selected** to assign a passenger. To assign all passengers, click **Assign All**.

Un-assigning Passengers to Disembarkation Group

1. Perform steps 1 to 4 from the Assigning Passengers to Disembarkation Group section above.

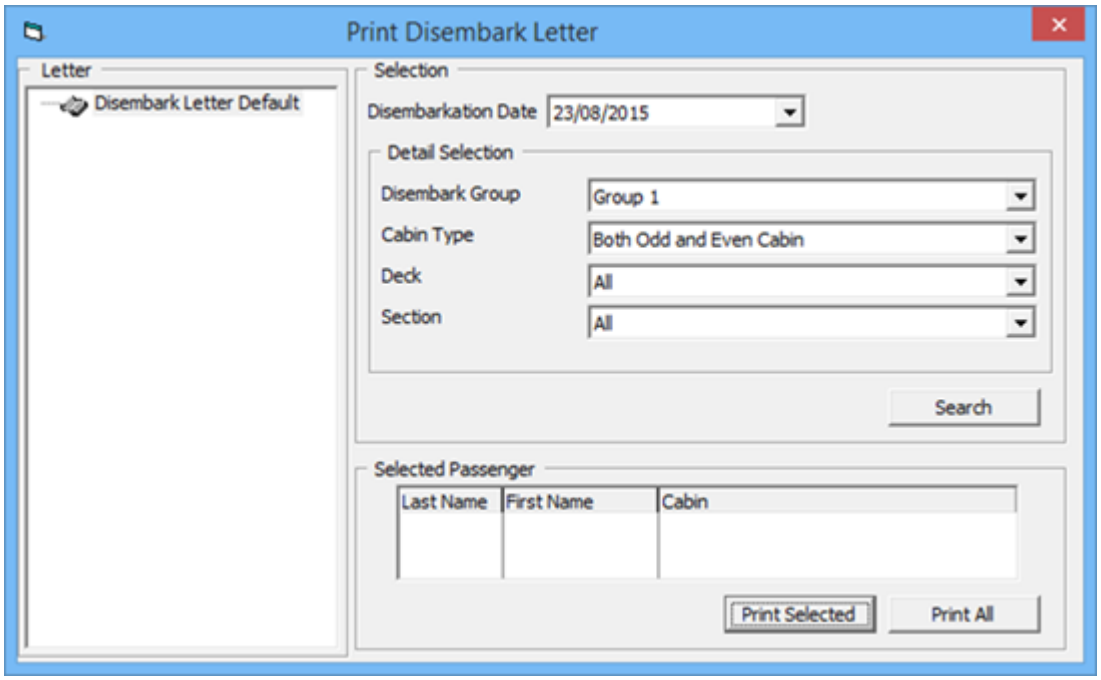
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2. Click **Unassign, Selected** to unassign from the grid.

Print Disembark Letter

The Print Disembark Letter allows you to print and notify guests of their debarkation time and meeting location.

Figure 10-166 Print Disembark Letter



1. From the Cashier File menu, select the **Print Disembark Letter** option.
2. Select the **Disembarkation Date** from the drop-down list.
3. In the Detail Selection section, select the **appropriate option** and click **Search**.
4. Select the **Passenger name** from Selected Passenger section and then click **Print Selected**.

Unposted Package Posting

The Unposted Package Postings are predominantly postings imported from Data Import or DGS ResOnline.

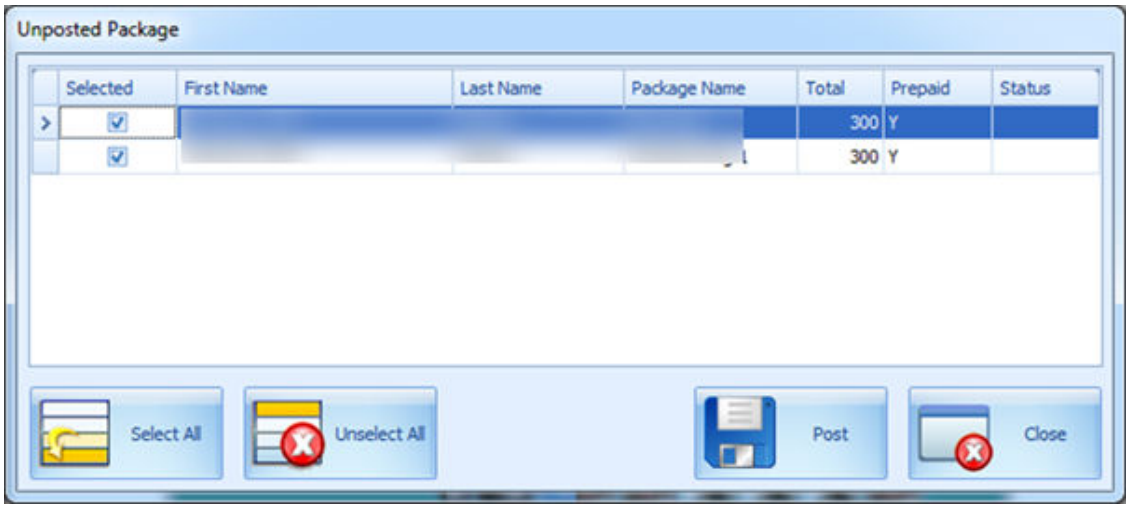
Viewing All Unposted Package Postings

1. From the Cashier menu, select **Unposted Package Posting**.
2. Select the **item** and click **Post** to post the package amount to the system account. The package posting are shown in the Guest Account.

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> **Note**
>
> The system does not check for unposted package postings when checking out the passenger account.

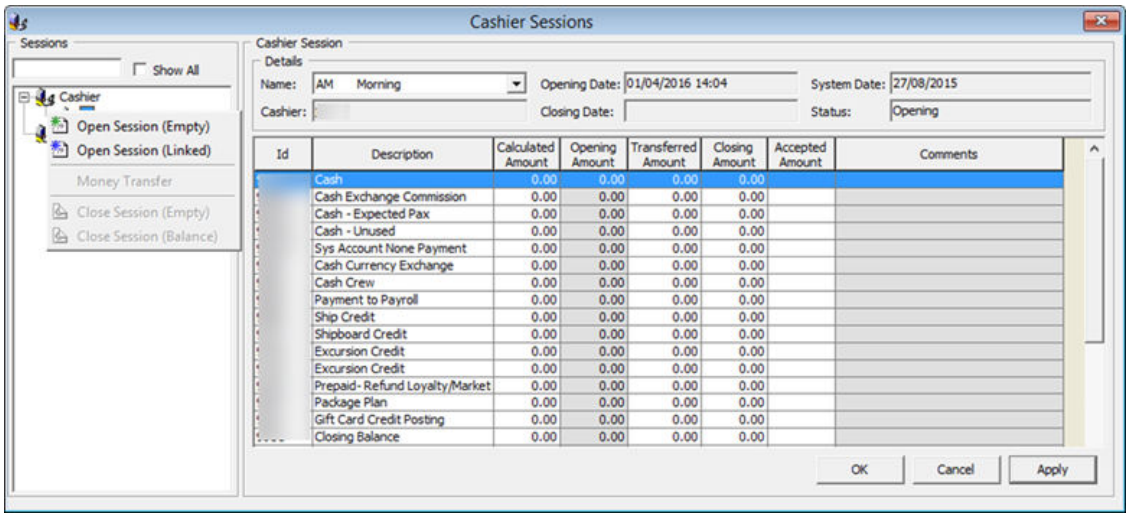
Figure 10-167 Unposted Package Postings Window



Cashier Sessions

The Cashier Sessions is a function that registers all credit collections for the day by individual user, and the users must have rights #371 — Cashier Sessions assigned. This function is enabled with the **Cashier, Use Full Cashier** parameter. A session code is required before the assigned cashier can open the cash register. These session codes are set up in the Administration Module, System Codes, Session Codes.

Figure 10-168 Cashier Sessions



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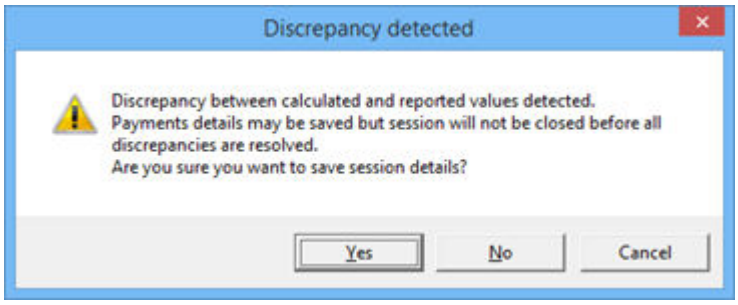
Opening a Cashier Session

1. From the Cashier menu, select **Cashier Session** from the drop-down list.
2. Click the plus **(+) key** to expand the Cashier container, right-click on the **user name**, and select one of the following options:
   - **Open Session (Empty)** — This function opens a cashier session for the selected shift.
   - **Open Session (Linked)** — This function opens a cashier session with previous closing balances being brought forward as the Opening Amount.
3. In the Name field, select the **Session code** from the drop-down list.
4. Enter the **Opening Amount** for the respective department code and then click **Apply**.

Closing a Cashier Session

1. From the Cashier menu, select **Cashier Session** from the drop-down list.
2. Expand the Cashier container, right-click on the session, and select one of the following options:
   - **Close Session (Balance)** — This function closes the cashier session by automatically filling in the amount in the **Closing Amount** column.
   - **Close Session (Empty)** — This function requires you to input the value in the **Column Amount** column.
3. Click **Apply** to save the value entered.
4. When there is discrepancy on the value, the system prompts for further action. Select **Yes** to set the session status to Discrepancy, allowing you to further research and resolve the discrepancy.

Figure 10-169 Cashier Closing Discrepancy



Resolving Imbalance Cashier Session

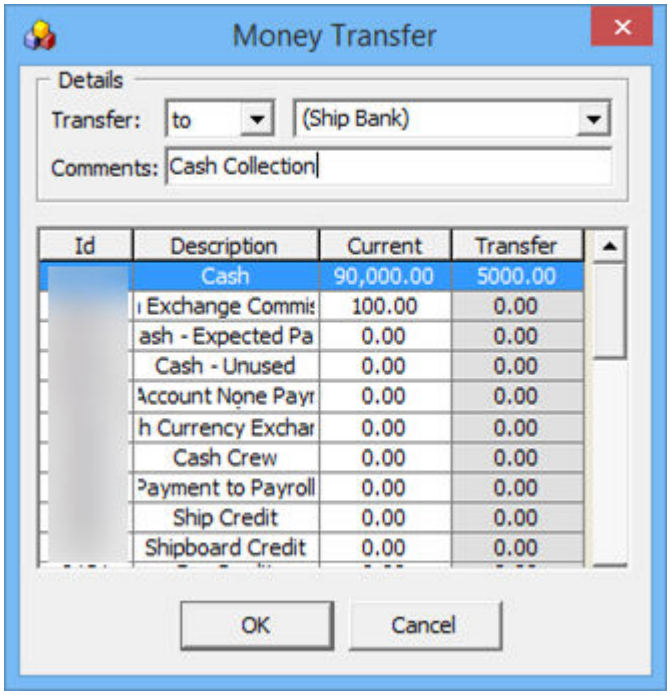
1. From the Cashier menu, select **Cashier Session** from the drop-down list.
2. Expand the Session container, right-click on the **session**, and select **Close Session (Balance)**.
3. Enter the correct value in the **Accepted Amount** column and click **Apply** to save the amount and print the final closing report.

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Transferring Money From/To Ship

Funds collected can be transferred from Ship to bank, shore side office, or vice versa.

Figure 10-170 Money Transfer



1. In the Cashier Session, click the plus **(+) key** to expand the **Session**.
2. Select the session to transfer the amount, then right-click and select **Money Transfer**.
3. Select the **transfer type** from the drop-down list.
4. Enter a **comment** in the Comment field and **amount** to transfer in the Transfer field.
5. Click **OK** to confirm the transfer.
6. Amount transferred appears in the Cashier Session, Transferred Amount column.

Options

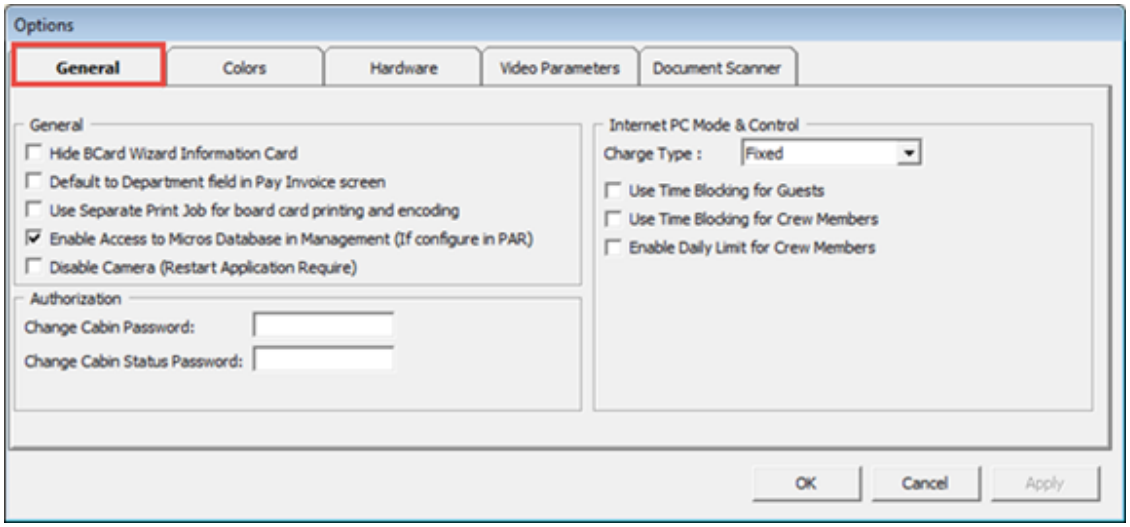
The Options menu is an area where supported hardware and devices are set up, and accessed from the Main menu. Check with your system administrator before making any changes.

General Tab

In the General Tab, you can check mark the boxes for options applicable to your operation. By default, the checkboxes are deselected.

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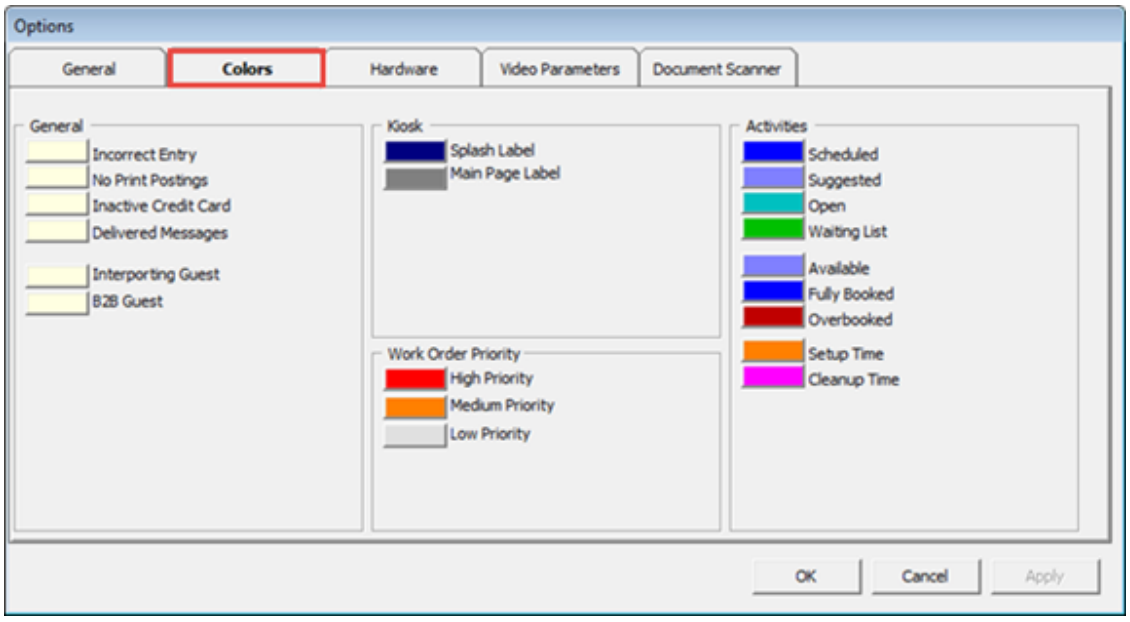
Figure 10-171 Options Menu — General Tab



Colors

The Colors tab allows you to define a standard color scheme suitable for the operations. These colors can be easily changed by clicking the color bar and then selecting the color from the color chart.

Figure 10-172 Options Menu, Colors Tab

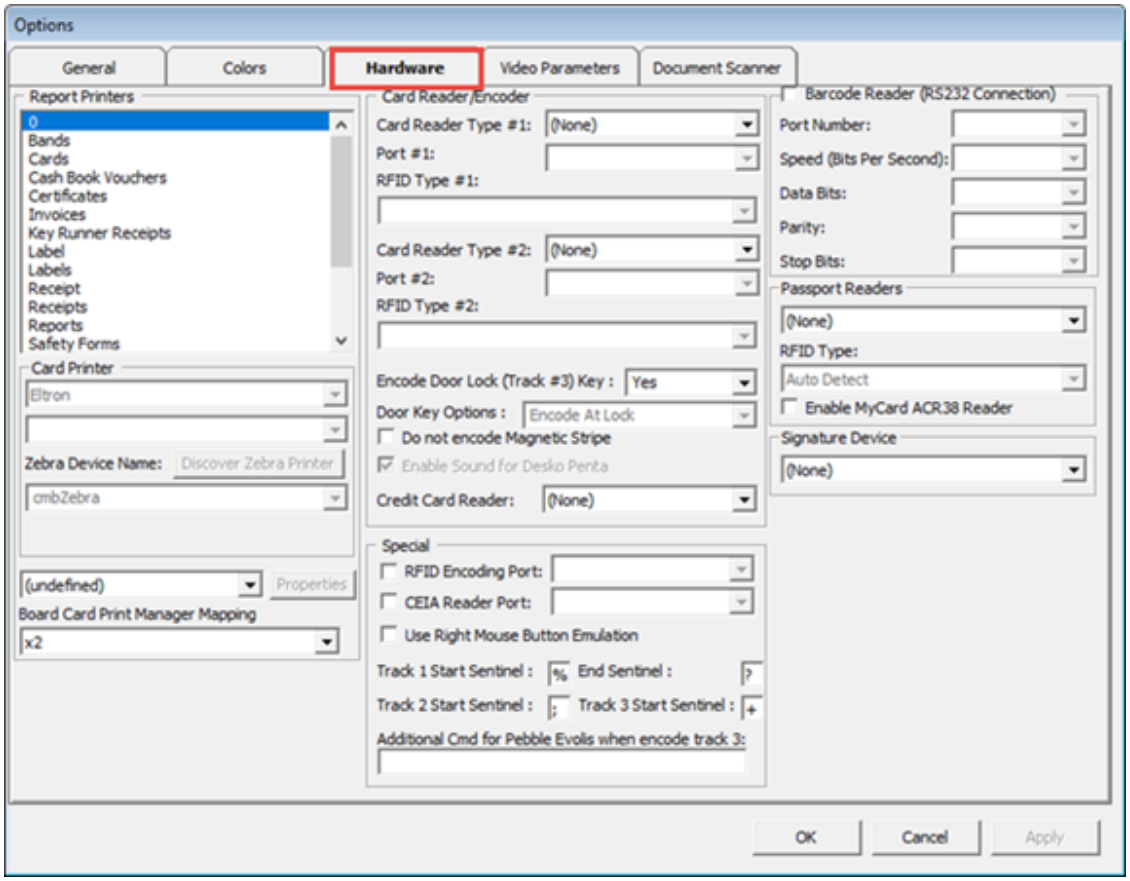


Hardware

In the Hardware tab, supported peripherals, printers and devices are configured. The window varies depending on the type of report printers you select. Contact Oracle Hospitality Cruise Customer Support for assistance.

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Figure 10-173 Options Menu, Hardware

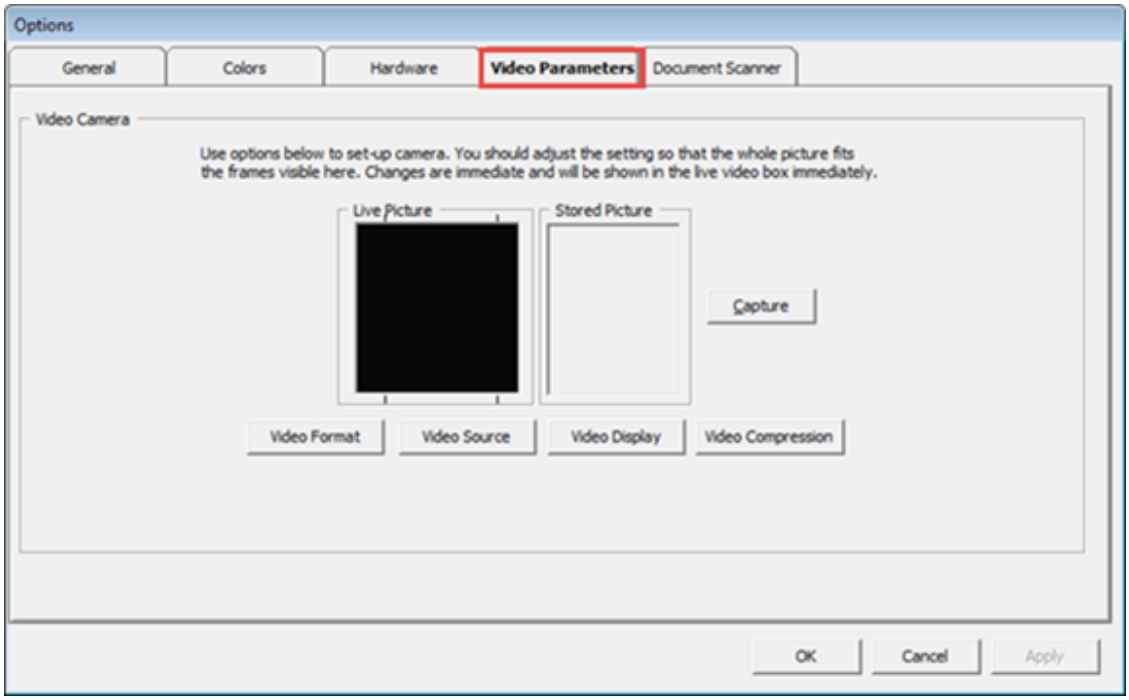


Video Parameters

This section defines the video format, source, and type of compression to store in the database.

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Figure 10-174 Options Menu, Video Parameters

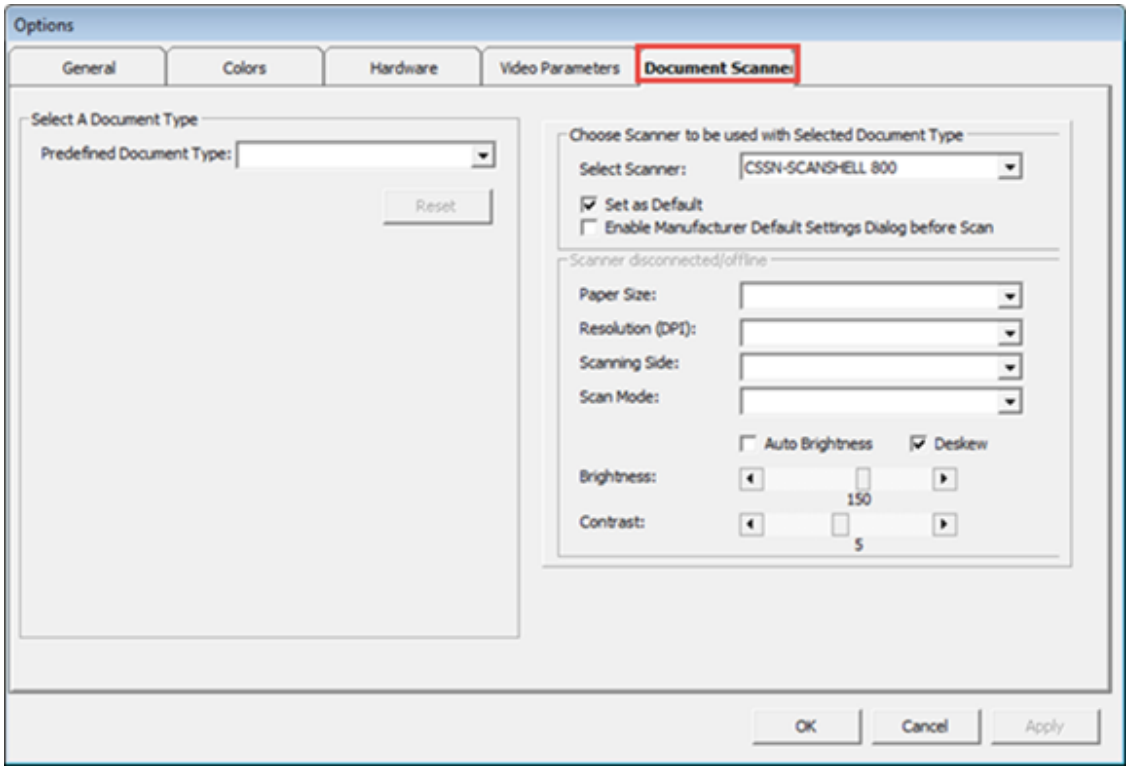


Document Scanner

This section links the type of scanner used for specific forms, for example, driver license, passport, and others.

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Figure 10-175 Options Menu, Document Scanner



Security

Function such as User Login, Passenger movement from ship to shore or vice versa, and statistic count of passengers on-board or at shore side are found under the Security menu.

Login

The Login function enables you to logout/login from current session, using either the **Function key (F8)** or by selecting the option from the Security menu.

Change Password

The Change Password function allows you to reset your password. You must log in prior to accessing this function.

1. From the Security menu, select **Change Password** from the drop-down list.
2. Enter the **new password**, **confirm the password**, and click **Apply**.
3. When the Password Successfully Changed prompt appears, click **OK**.

User Logfile

The User Logfile records all transactions performed by users by date and time order. You can retrieve the information using the available filters such as by user, type of activities, date, time, or workstation. Transaction logs are also printable and exportable in a supported file format.

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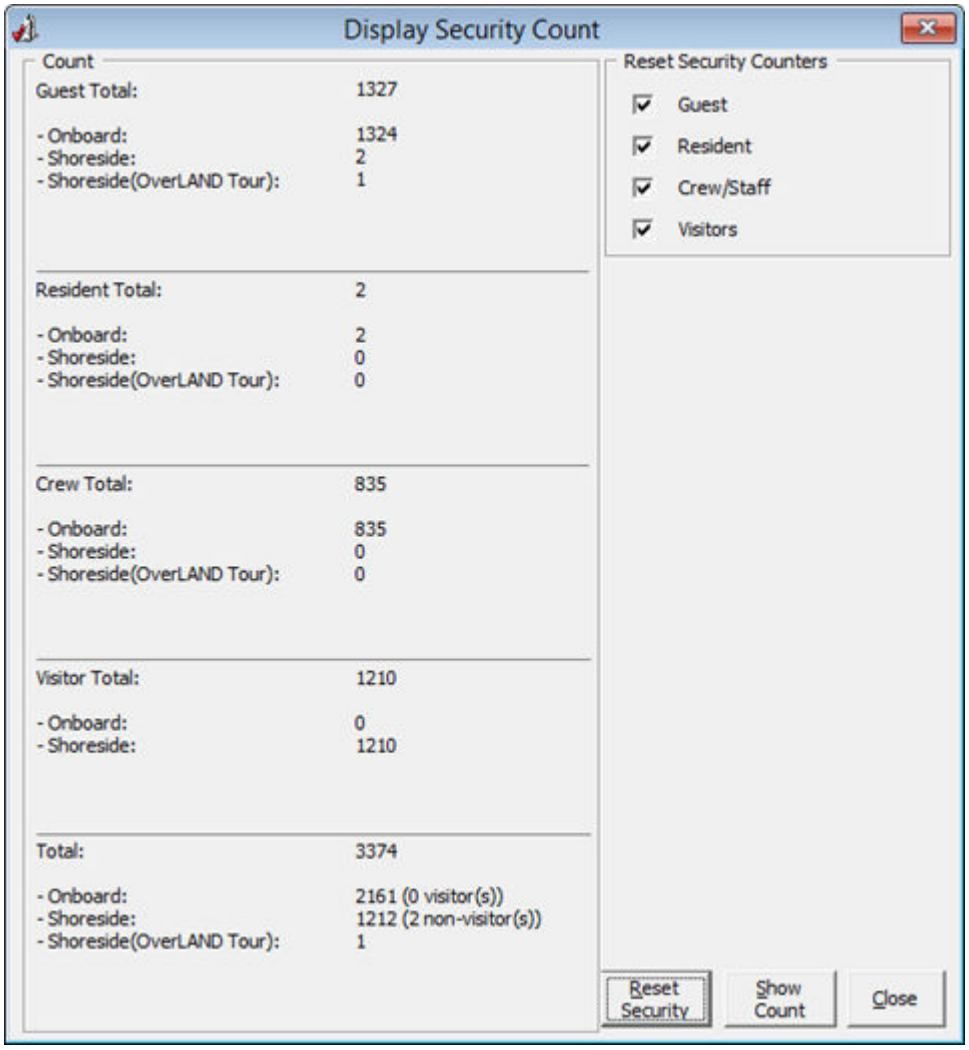
Gangway Logfile

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

Count Onboard/Shoreside

The Count Onboard/Shoreside displays the security count of total passengers, and the number of passengers onboard or at shoreside. The counts are shown by the type of passengers.

Figure 10-176 Count Onboard/Shoreside



To reset the count, click the **Reset Security** button. The messages prompt varies on each reset.

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Guests/Crew Onboard

The Guest/Crew Onboard lists all passengers onboard, with the Last Coming On-Board status appearing when you select the passenger's name.

The status of the guest can be changed by:

- Clicking **Go Ashore** to set the selected passenger status from Onboard to Ashore.
- Clicking **Gangway Log** to open the gangway movement log.

Guest/Crew Shoreside

This function is the same as Guest/Crew Onboard and only displays passengers that are ashore.

You can change the status by:

1. Clicking **Go Onboard** to set the selected passenger status from Ashore to Onboard.
2. Clicking **Gangway Log** to open the Gangway movement log.

Port/Visa Requirement

The Port/Visa requirements function enables you to restrict passengers/crew that has travel restrictions on their travel document from going ashore on port day. Once set up, the system prompts a notification window when a restricted passenger's passport/travel document is swiped at the Gangway.

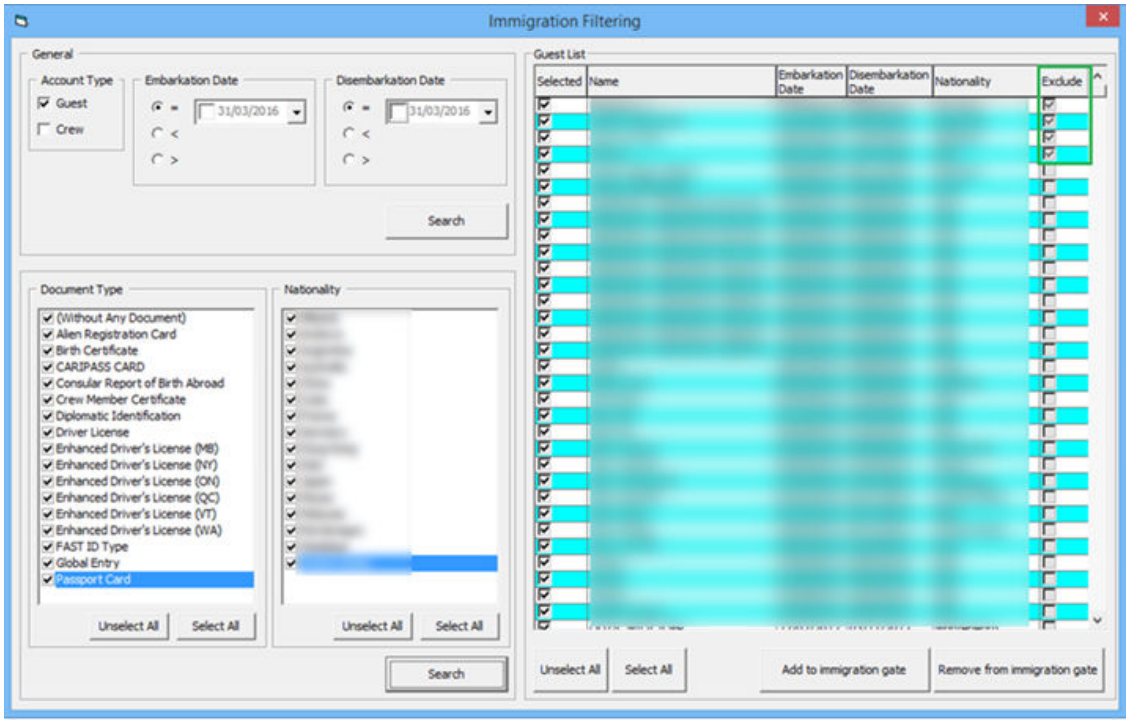
1. From the Security menu, select **Port/Visa Requirement**.
2. Click **Add New**, enter the **Date/Time From/To field**, and select the **Port** from the drop-down list.
3. Select whether the restriction applies to Pax and Crew, Pax or Crew only.
4. In the Conditions Setup section, select the **Nationality** and **Visa Type** from the drop-down list, and click **Save**.
5. At the Insert Confirmation prompt, select **Yes** to confirm and then click **Close** to exit.

Immigration Filtering

This function enables you to define the guest or crew to exclude from the Immigration Inspection.

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Figure 10-177 Immigration Filtering



1. From the Security menu, select **Immigration Filtering**.
2. In the General section, select the **Account**, select **Embarkation/Disembarkation**, and click **Search**.
3. Select the **Document Type**, select the **Nationality**, then click **Search** to further filter the guest list.
4. On the Guest List, select the passenger to add or exclude from immigration gate and then click the respective button.

> **Note**
>
> If Guest has *"Switch to Crew in Manifest"* set up, then the guest account appears under Account Type "Crew". If Crew has *"Switch to Passenger in Manifest"* set up, then the Crew account appears under Account Type "Guest".

5. Excluded passengers have a check mark in the **Exclude** column.

Gift Card

The ship operator might choose to offer guests a pre-paid credit via a Gift Card (GC) for use on board. Additionally, these Gift Cards can be utilized as part of promotional incentives or integrated into a rewards program to drive sales and increase guest satisfaction.

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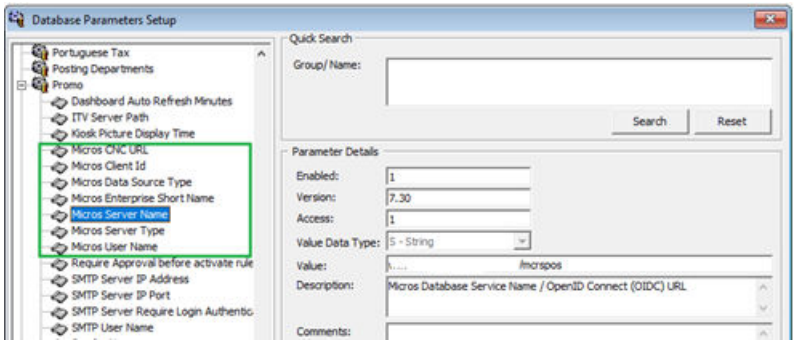
System Configuration

This section describes the required system codes setup within the **Administration** and **Management** modules. It also includes an additional installation such as Web Service installation, which is required for use in Gift Card functions.

Setting up Simphony Server Connection

To retrieve the POS data, you must establish a connection to the Simphony Server. Follow the steps below to set up the connection.

Figure 10-178 Simphony Database Connection



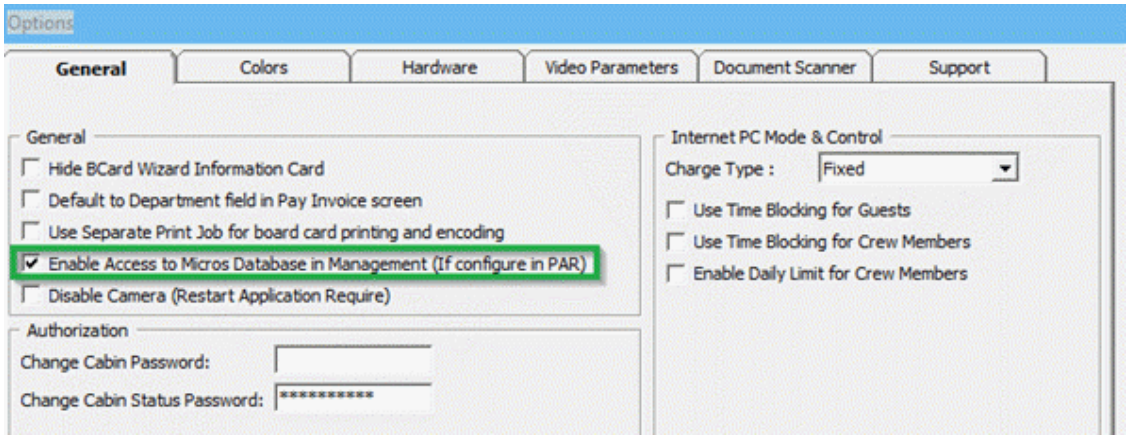
> **Note**
>
> Before setting up the connection, the MICROS database ID (SID) must exist in tnsname.ora

1. In the Database Parameters Setup window, expand the Promo group.
2. Enter these values in the respective parameter fields:
   - **Micros CNC URL:**URL of Simphony CNCAPI on cloud or premises
   - **Micros Client Id:** CNCAPI Account's property, for retrieval of authorized cookies, code and token
   - **Micros Data Source Type:** 0 – Direct access Micros DB, 1-Simphony Cloud CNCAPI
   - **Micros Enterprise Short Name:** Enterprise Short Name value in Simphony Cloud Welcome email
   - **Micros Server Name:** Micros Database Service Name or OpenID Connect (OIDC) URL
   - **Micros Server Type:** Set to '0' for Oracle Server, 1-Microssoft SQL Server
   - **Micros User Name:** Micros User Name or OIDC User Name
3. If the parameter entered is incorrect, the system will prompt an error "MICROS Server is offline, MICROS setup will be disabled".
4. Navigate to the Management module and select **Options, General tab**.

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5. Select **Enable Access to MICROS Database in Management**, and click **Apply** to save.

Figure 10-179 Management, Options Setup



Department Setup

Any Gift Card transaction posting such as a Gift Card purchases (physical card purchased), Gift Card value posting (purchase against Gift Card), or Gift Card balance (lookup) would require a appropriate financial department. A debit/credit department code for a Gift Card is needed for charging or posting. You can set this up in **Administration module, Financial Setup, Department Setup**.

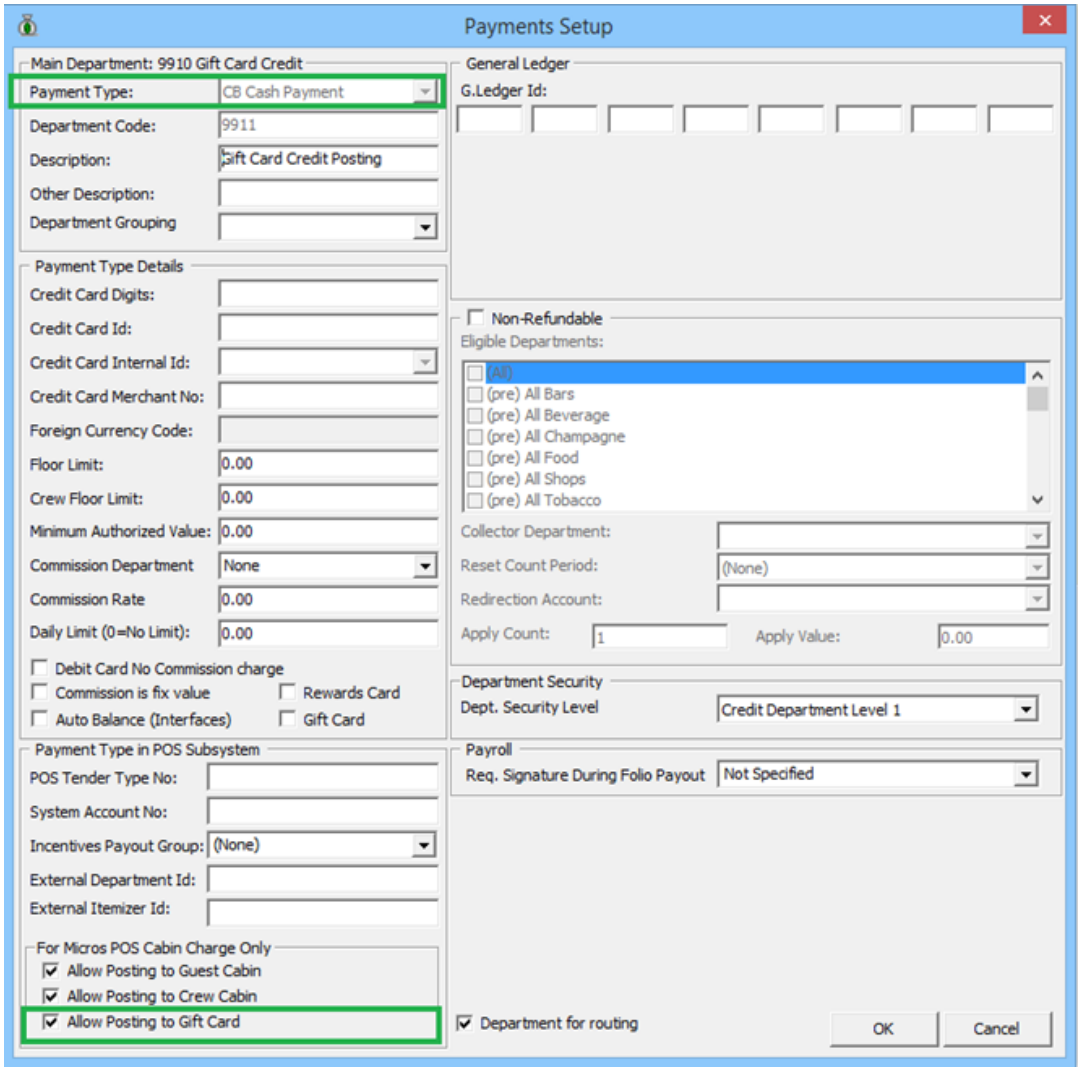
Setting up Credit Department Code

Log in to the **Administration** module and select **Financial Setup, Department Setup** from the drop-down list.

1. Click **New** to create a Main Department code.
2. In the Department Code Setup window, click **New** to create a Sub-Department code.

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Figure 10-180 Sub Credit Department Code Setup



3. In the **Payment Setup** window, complete the following:
   a. Select the **Payment Type** as CB Cash Payment.
   b. Insert a unique **Department Code**.
   c. Insert the sub-department **Description**.
   d. Select the **Allow Posting to Gift Card** checkbox to enable Gift Card posting in revenue centre.

Setting up Debit Department Code

1. Select **Financial Setup, Department Setup** from the drop-down list.
2. In the Department Code Setup window, click **New** to create a Sub-Department code.
3. In the Debit Department Code setup window, select the **Type of Posting** as Posting Department, define a unique Department Code, and insert the sub-department Description.
4. Repeat the above setup for the following sub departments:

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Table 10-38 Gift Card Sub Department List

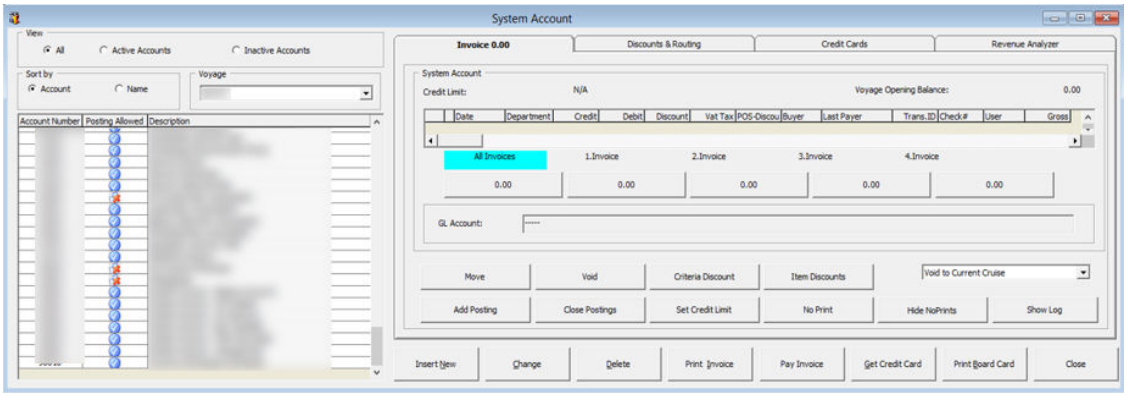
Sub Department	Description
Gift Card Posting	Use for posting when selling Gift Card.
Gift Card Collector	Use for unused balance posting. Example: Gift Card expired with remaining balance.
Gift Card Discount	Use for posting of difference amount between Gift Card face value and selling amount.
Gift Card Second Posting	Use for split posting when selling Gift Card.
Gift Card Credit Posting	Use for Gift Card credit posting.

System Account Setup

System Account Setup

A System Account is needed as a placeholder for the prepaid Gift Card posting and its collection. The account is setup in the **Management** module, **System Account Handling** window.

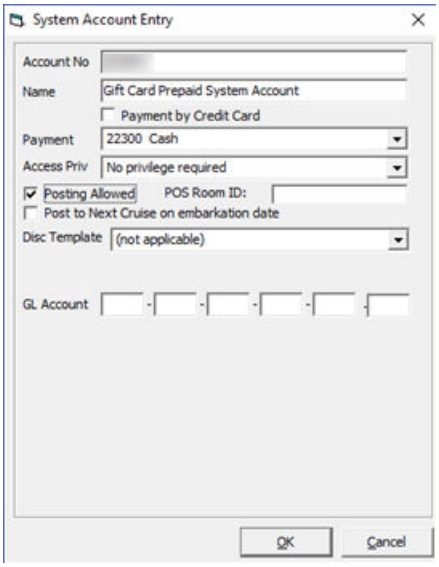
Figure 10-181 System Account Window



1. Launch the **Management module**, and select **Cashier, System Accounts** from the drop-down menu.
2. In the System Account window, select **Insert New**.

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Figure 10-182 System Account Entry Form



3. In the **System Account Entry** window, insert a unique **System Account number, Name,** and select the **default payment department,** or create a different credit department to cater for pre-paid account balancing, and check the **Posting Allowed** checkbox.
4. Repeat the above setup to create the following System Account.

Table 10-39 Gift Card System Accounts

System Account	Description
Gift Card Prepaid System Account	Use for pre-sold Gift Card posting apply when importing Gift Card records from Data Import / DGS ResOnline).
Gift Card Discount System Account	Use for posting of difference amount between promotional value of Gift Card and prepaid amount (Face value — Selling Price).

Gift Card Setup

Create a Gift Card product based on the following entitlement and set it up in the **Administration module, Gift Card Setup**.

- Gift Card Eligibility Group
- Gift Card Eligibility Setup
- Gift Card Template Group
- Gift Card Template Setup
- Gift Card De-Activation Reason
- Gift Card Re-Activation Reason
- Gift Card Cancellation Reason

Setting up Gift Card Eligibility Group

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This is a group for each type of Gift Card eligibility. The Eligibility Group defines the type of eligibility for each type of cards.

Figure 10-183 Gift Card Eligibility Group Setup



1. From the **Administration, Gift Card Setup** menu, select **Gift Card Eligibility Group**.
2. In the Gift Card Eligibility Group Setup window, right-click and select **Add New**.
3. Enter a short code and a description in the **Description** field.
4. Enter a comment in the **Comments** field, if any.
5. Click **OK** to save.

Setting up Gift Card Eligibility Setup

The Gift Card is another mode of payment accepted by designated Food and Beverage (F&B) or Retail outlets on-board of the ship. A Gift Card transaction may be limited to a range of items and these are managed within the eligibility setup. To retrieve the Simphony Sales Itemizer, you must ensure you are connected to Simphony Database before to completing the Gift Card Eligibility Setup. See Setting up Simphony Server Connection

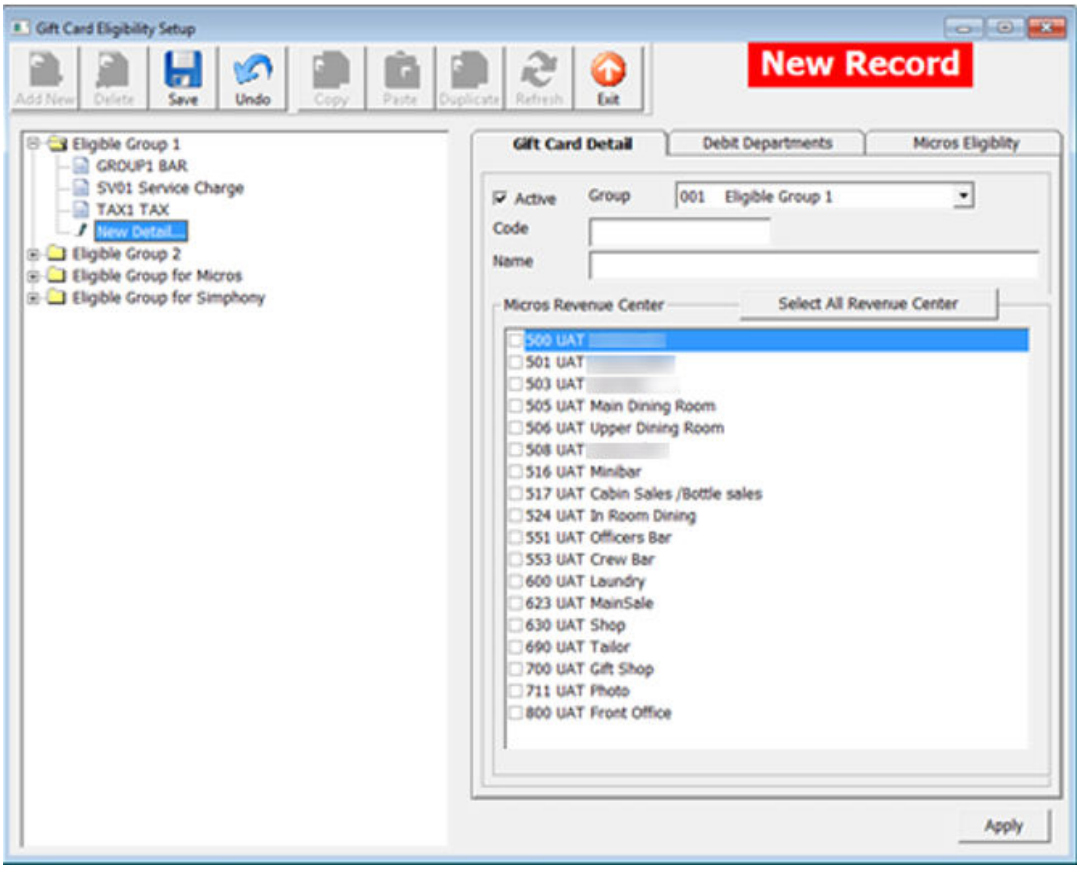
Adding New Record

1. From the **Administration, Gift Card Setup** menu, select

   Gift Card Eligibility Setup. This launches a progress window while the System connects to Simphony database
2. On the Gift Card Eligibility Setup window ribbon bar, click **Add New** to add a new record.

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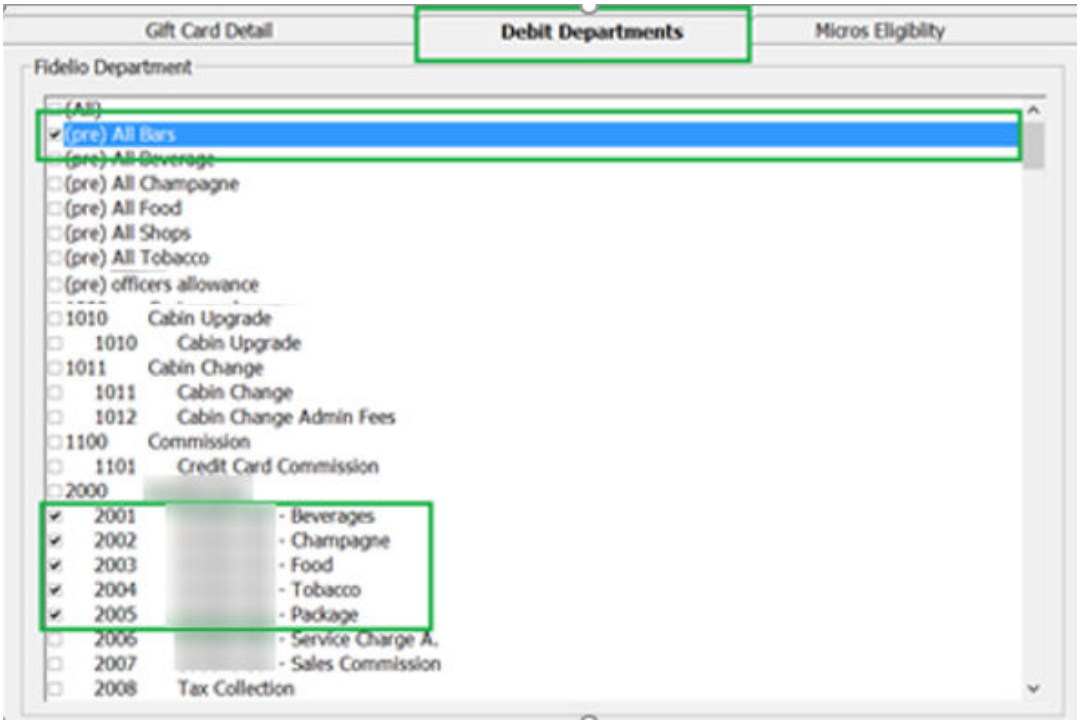
Figure 10-184 Gift Card Eligibility Setup



3. On the Gift Card Detail tab, select the **Group** from the drop-down list. Insert a unique Gift Card code and name.
4. Select the applicable **MICROS Revenue Centre** by selecting the respective checkbox.
5. Navigate to the **Debit Department** tab and select the eligible **SPMS Posting Departments**, by selecting the Main Department. This will also include all the sub-department codes.

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Figure 10-185 Gift Card Eligibility Debit Department Setup

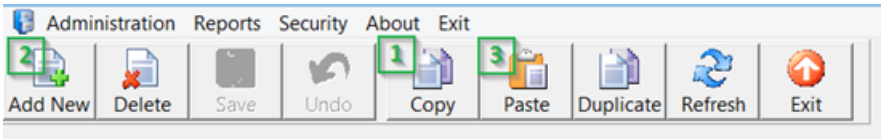


6. Click **Save** on the ribbon bar to save the record.

Copying Eligibility Setup

An existing eligibility details can be copied to a new record with this simple steps.

Figure 10-186 Steps to Perform Copy/Paste



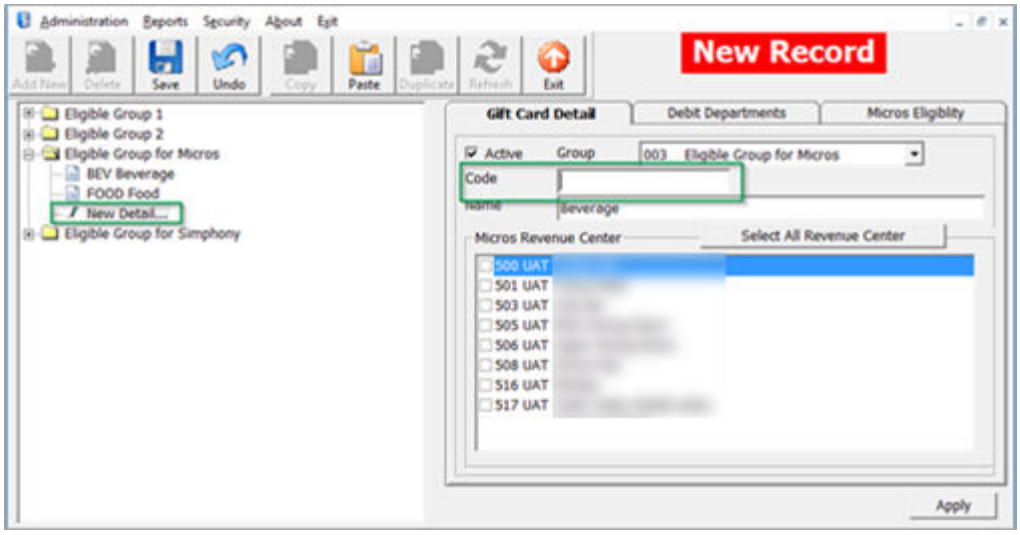
1. From the Eligibility Group tree view, select the code to copy and then click **Copy** on the ribbon bar.
2. Click **Add New**, followed by **Paste** from the ribbon bar.
3. Insert a unique code and make the necessary changes, if any, then click **Apply**.
4. Click **Save** to save the record.

To Duplicate the Group

1. Expand the tree view and select the eligibility to duplicate.
2. Click **Duplicate** on the ribbon bar.
3. The eligibility of the selected item is duplicated into a New Record form.
4. Insert a new **code** and click **Save** to save the new record.

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Figure 10-187 Steps to Perform Duplicate

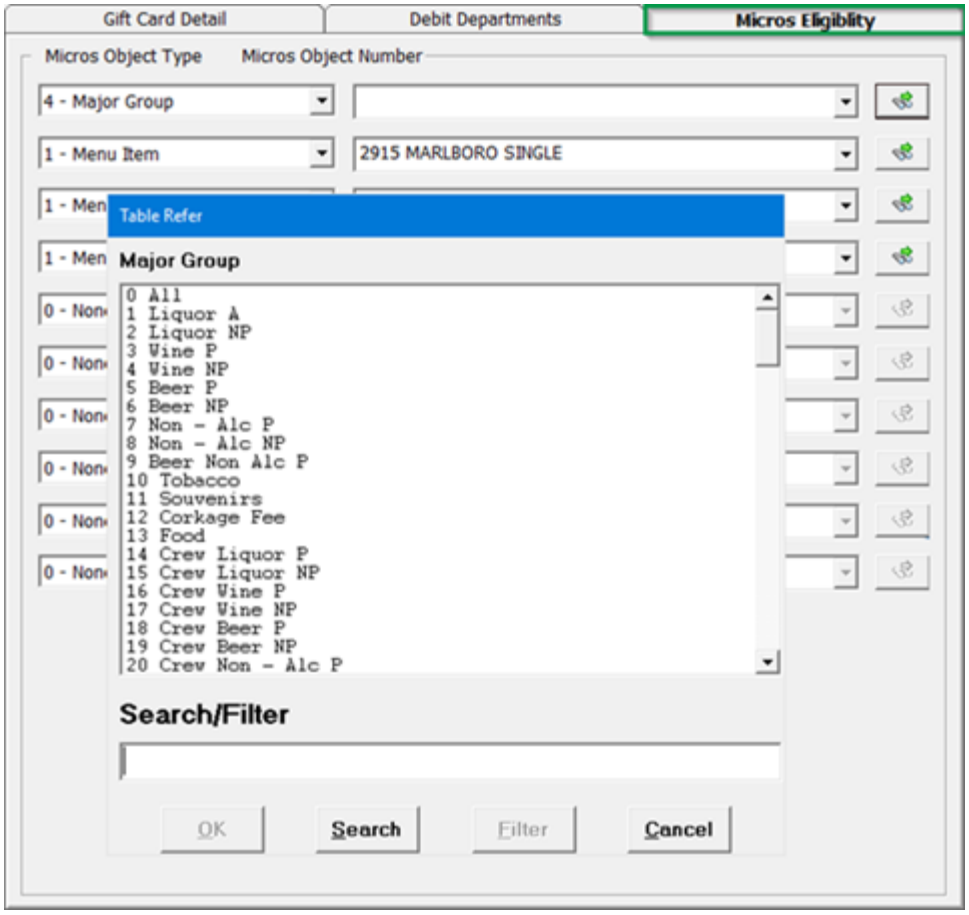


Adding Simphony Sales Itemizer to GC Eligibility Setup

1. From the GC Eligibility Setup form, select the **Gift Card** code.
2. Navigate to the **MICROS Eligibility** tab and select the **MICROS Object Type** from the drop-down list.
3. Click the object drop-down list to select the object, or use the search function by clicking the **Binocular** icon to open the MICROS Object Number list.

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Figure 10-188 MICROS Object Number List



> **Note**
>
> Each GC can have up to 10 different POS family groups and are available to all revenue centre for all departments.

Setting up Gift Card Template Group

Use the Gift Card template group to group the available templates. To set up, repeat the steps in the Setting up Gift Card Eligibility Group.

Setting up Gift Card Template

The Gift Card Template allows you to predefine the Gift Card value, selling price and eligibility within a template, for use during the Gift card sale.

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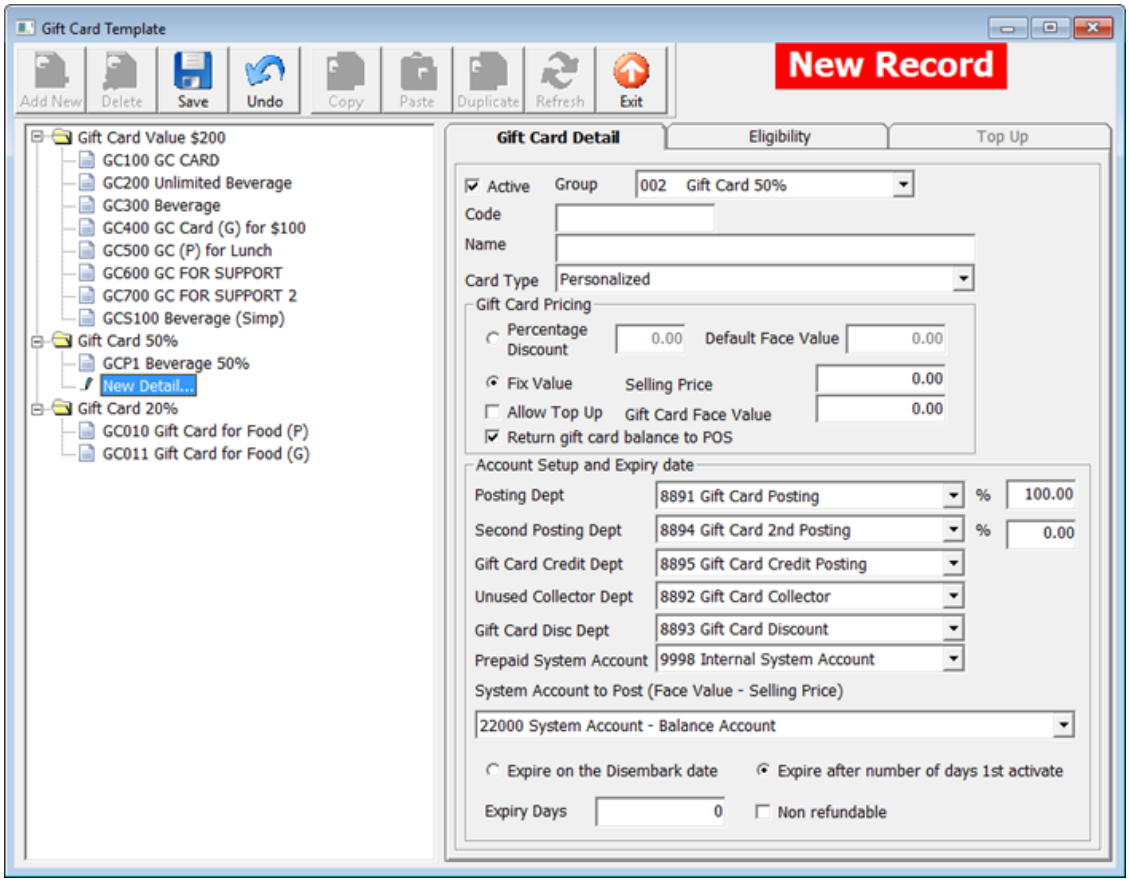


Table 10-40 Gift Card Field Description

Field	Description
Card Type	
Generic	Not associated with a particular guest and may be used by any physical holder.
Personalized	Associated with a particular guest and may have guest name printed.
Gift Card Pricing	
Percentage Discount	Percentage of the Default Face Value defines the selling price, for example; Default Face value is $300 with percentage set as 20%, and therefore, selling price of the card is $240.
Fix Value	Gift card selling price and face value is the exact value indicated.
Account Setup and Expiry Date	
Posting Department	Primary debit department code for Gift card selling price.

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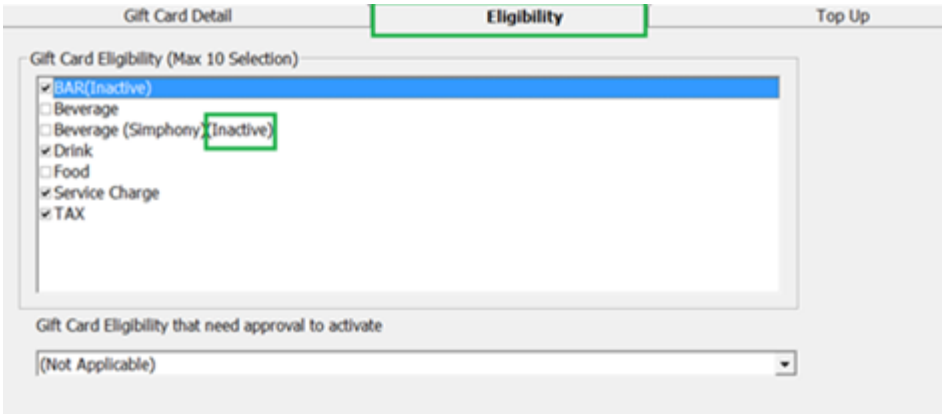
Table 10-40 (Cont.) Gift Card Field Description

Field	Description
Second Posting Dept.	Secondary debit department for gift card selling price is mainly used to capture portion of the Percentage Discount posting. The percentage is not editable and auto updated by the percentage value in Posting Dept. *Fore example: If Gift Card selling price is $100, the percentage value defined in Posting Department is 85%, the Percentage of Second Posting Dept will auto update to 15%. The Gift Card posting will split into $85 in Posting Department and $15 into Second Posting Department.*
Gift Card Credit Dept.	Credit / Debit department for posting Gift Card face value.
Unused Collector Dept.	Debit department that collects Gift Card refund amount.
Gift Card Discount Dept.	Debit department for posting differences for Gift Card face value and selling amount.
Prepaid System Account	An account used to post pre-sold Gift Card.
System Account to Post (Face Value – Selling Price)	An account used for posting differences between promotional value of Gift Card and prepaid amount.
Expire on disembarkation date	Expiration date based on Guest disembarkation date.
Expire number of days 1st activate	Expiration date based on x days from period of activation.
Non Refundable	Define whether Gift Card balance is refundable or not.

1. From the **Administration, Gift Card Setup** menu, select **Gift Card Template.**
2. In the Gift Card Template Setup window, click **Add New** on the ribbon bar.
3. Navigate to the Gift Card detail tab and select the Group from the drop-down list.
4. Insert a **unique code, name** and select the **Card Type** from the drop-down list.
5. In the Gift Card Pricing section, select the pricing method from the drop-down list.
6. Select the **Allow Top Up**, if applicable and **Return Gift Card Balance to POS for GC balance** to print on bill image.
7. In the **Account Setup and Expiry date** section, select the respective **Posting Department** from the drop-down list.
8. Navigate to the **Eligibility** tab and select the eligible department group and the maximum allowed (*10 department groups*). An inactive department group is indicated with *(Inactive)*.
9. In the **Gift Card Eligibility that needs approval to activate** section, select the eligibility activation approval from the drop-down list, if an approval is needed.

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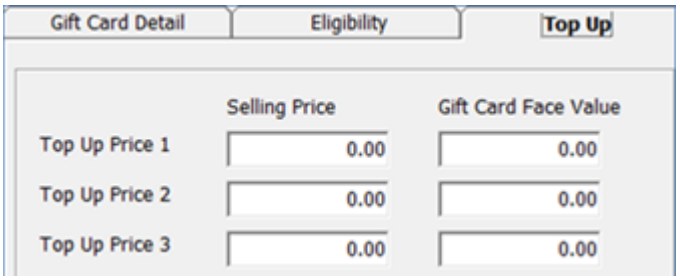
Figure 10-189 Gift Card Template Eligibility Setup



> **Note**
>
> This option is used in the **Management module, Gift Card Handling, Special Department / Family group** when it is set to active.

10. Navigate to **Top Up** tab and insert the **Selling Price** and **Gift Card Face Value**.

Figure 10-190 Gift Card Top Up Setup



> **Note**
>
> This option is available when *'Allow Top Up'* is enable in Gift Card Pricing section.

Setting up Gift Card De-Activation and Re-Activation Reason

The De-Activation and Re-Activation Reason code is used for auditing purposes when de-activating or re-activating a Gift Card. You are encouraged to select the appropriate reason. To enter a De-Activation/Re-Activation Reason, repeat the steps in Setting up Gift Card Eligibility Setup

Setting up Gift Card Cancellation Reason

Similarly, a Cancellation reason code is used for auditing purposes when cancelling a Gift Card and you are encouraged to select the appropriate reason. To enter a De-Activation/Re-Activation reason, repeat the steps in Setting up Gift Card Eligibility Setup.

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Gift Card Report Setup

The application prints a Gift Card Receipt when guests make a purchase or activates their card. A Standard Credit Card receipt template is available in **Administration, System Setup, Report Setup** group. Contact Oracle Customer Support if you wish to have a customized receipt format configured.

- **Gift Card Report:** Layout used to produce a gift card in the Management module.
- **Gift Card Receipt:** Generates upon purchase and activation.
- **Gift Card Refund Receipt:** Generates upon refund of gift card value.
- **Gift Card Top Up Receipt:**Generates upon Gift Card top up.

Gift Card Handling

The following section describes the creation and usage for Gift Cards.

Gift Card Import

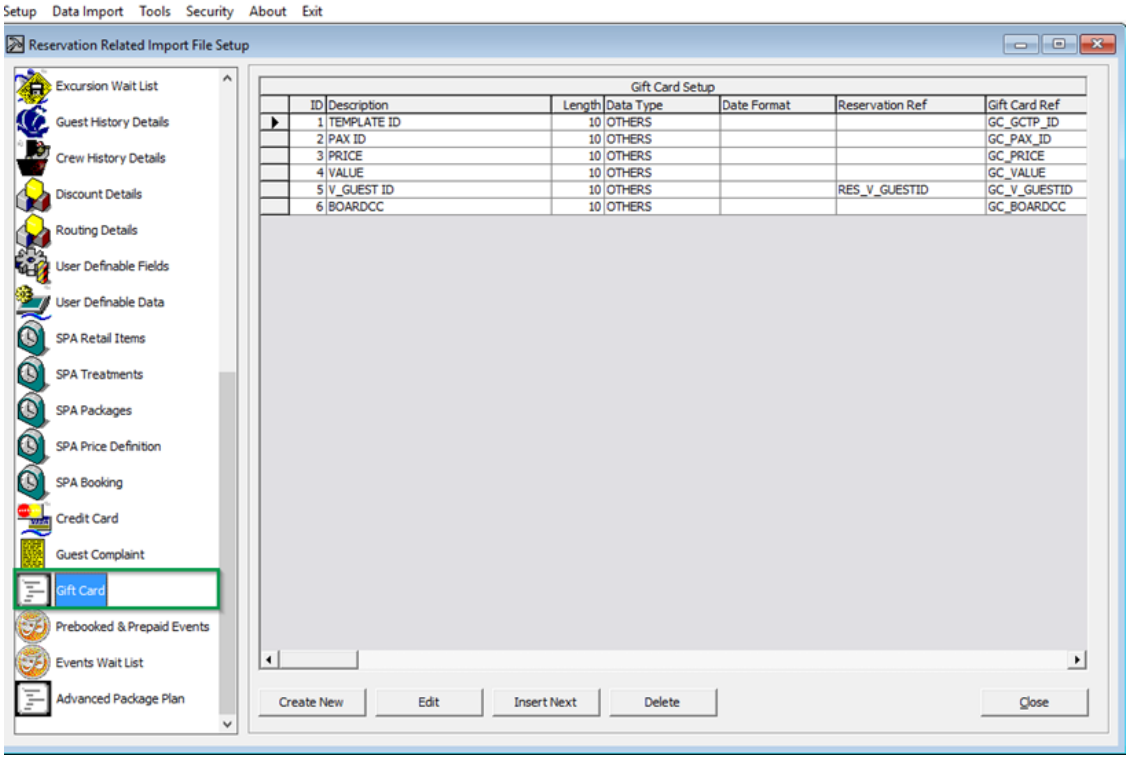
Gift Card sales records are importable from OHC Data Import and the OHC DGS ResOnline module. The imported Gift Cards are flagged as Pre-Paid or Pre-Sold to Guests, and have an *Inactive* status. These cards are activated upon first use at Simphony POS and/or OHC SPMS. Upon activation, the purchase value is posted to the System Account.

Importing Gift Card Data using OHC Data Import

Prior to performing an import, you must set up a Gift Card Import file with the seven or more mandatory fields.

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Figure 10-191 OHC Data Import — Gift Card



1. Launch **OHC Data Import** program.
2. From the File menu, select **Setup, Reservation Related** and then **Gift Card**.
3. Click **Create New** and insert the number 7 in the **New Import File Setup** window, and then click **OK**.
4. Insert the field description per the table below and, click **Close**.

Table 10-41 Gift Card Data Import Field Setup

Field	Data Type (Length)	Database Field Reference	Description
GC Template	Text (10)	GC_GCTP_ID	Gift Card template code
GC Guest Account	Text (20)	RES_V_GUEST_ID or RES_BOARDCC	Guest association with Gift Card
GC Price	Text (10)	GC_PRICE	Gift Card selling price
GC Value	Text (10)	GC_VALUE	Gift Card face value
GC Number	Text (20)	GC_BOARDCC	Gift Card unique number
GC Card Remark	Text (30)	GC_REMARKS	Gift Card special message
GC Special Department Group	Text (2)	GC_ENABLED_GCEL_ID_SPECIAL	Gift Card special department enable

5. Navigate to the **Data Import** menu and select **Prepaid Gift Card** from the drop-down list.

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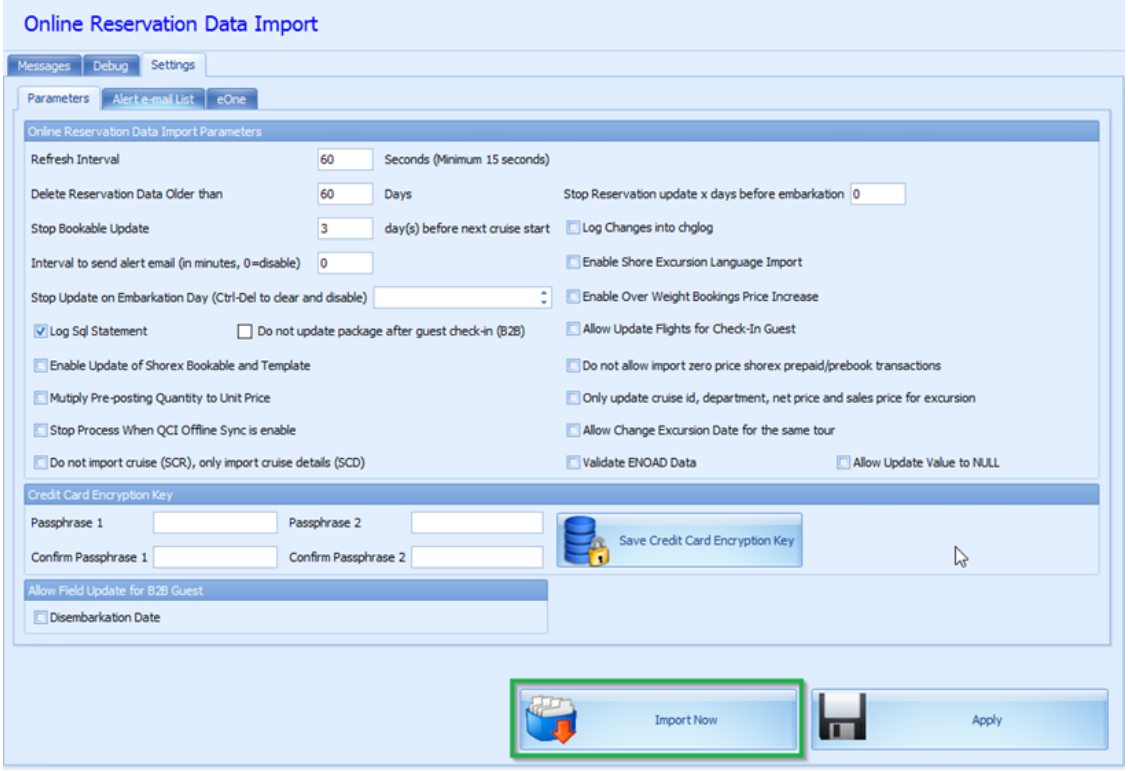
6. In the **General Data Import** form, select the file name and click **Import**to process the data import. See Appendix C –Sample Gift Card Data Import File Layout.

Importing Gift Card Data using OHC DGS ResOnline

Most of the Gift Card records are generated from FMS System, and transferred to OHC SPMS through the FMS Sender module, import function. Once imported, these records are stored in a ship database table

```
'RESERVATIONS_MSGS' with MSSG_NOTES = RESERVATIONSDATA.
```

Figure 10-192 DGS ResOnline Import



1. Launch **OHC Data Import** program and wait for the import process to begin.
2. If the process does not start automatically, manually trigger the import from the **Settings, Parameter** tab.

The Gift Card records are linked to the guest reservation/amenity respectively by these fields provided in the XML file.

- Reservation: <GIFT_CARD_RES_ID> = <RESERVATION_RES_ID>
- Amenity: <GIFT_CARD_OID> = <AMENITY_OID>

The number of Gift Card to import is based on the field **<GIFT_CARD_QUANTITY>** in XML file.

- If the field value is null, it imports one Gift Card.
- If the field value is two, it imports two Gift Cards.

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- If the field value updates from two to one, it cancels one of the Gift Cards.
- If the field value update from two to three, it inserts one more Gift Card.

See Appendix D – Sample Gift Card DGS RESONLINE File Layout - for detailed sample XML file format

Gift Card Printing

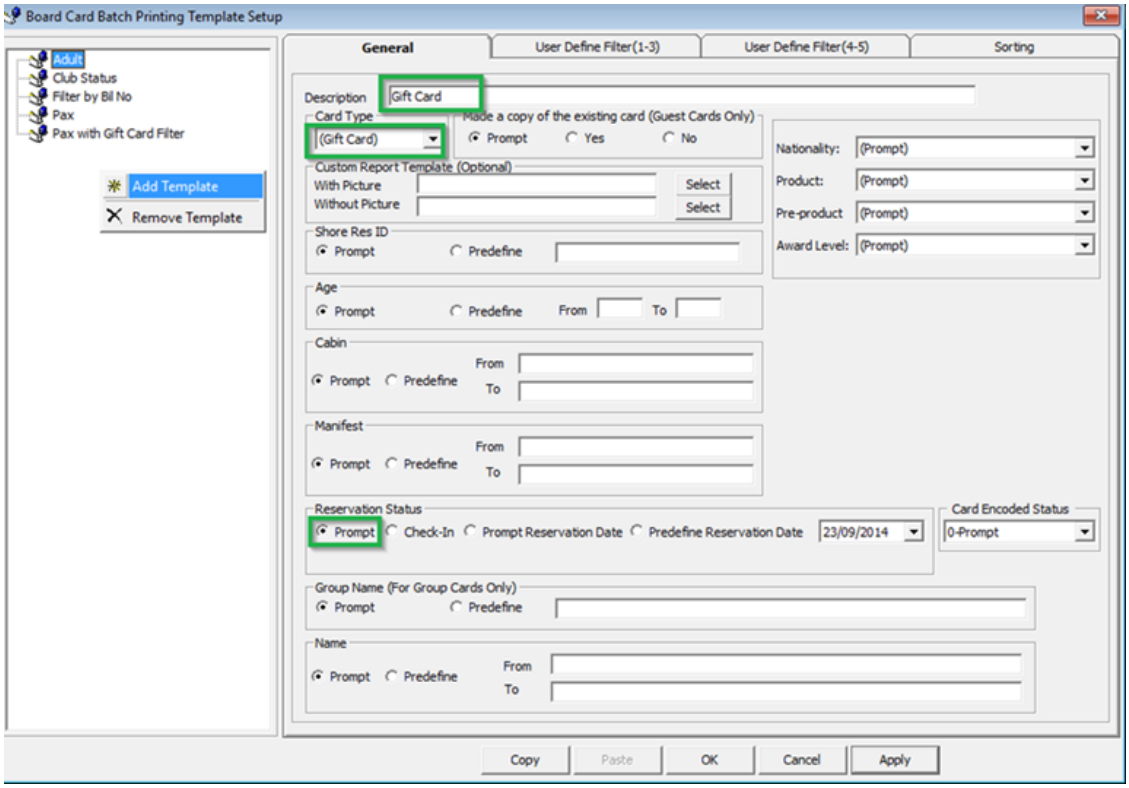
The application provides a few ways to print a Gift Card either by individual account or by batch, and the print task is performed in the **Management** module.

Print using Advanced Board Card Printing

To print a gift card using Advanced Board Card Printing function, you would need to set up a template in the **Administration** module.

Setting up Gift Card Template

Figure 10-193 Board Card Batch Printing Template Setup



1. Launch the **Administration** program.
2. In the Administration module, then select **Board Card Printing Template**.
3. In the Board Card Batch Printing Template Setup, right-click and select **Add Template**.
4. Click **Apply** to save the template.
5. To print a Guest Onboard card that is linked to the Gift Card, contact the Oracle Customer Support as additional setup is required in the Gift Card Template.

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Printing of Gift Card

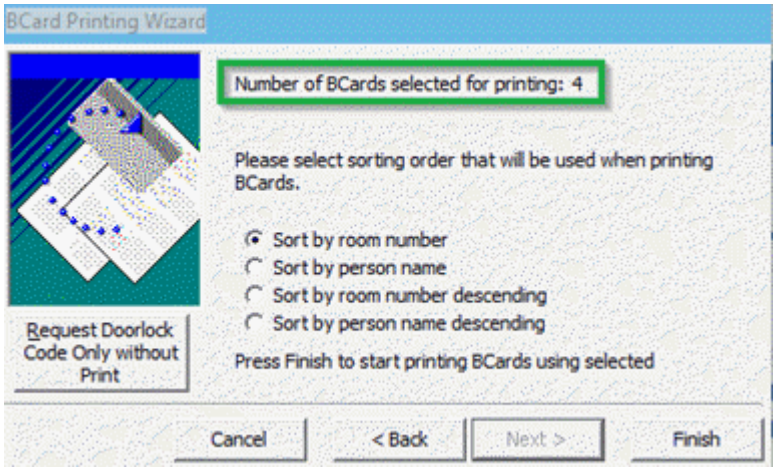
1. Log in to **Management** module and navigate to **Front Desk, Advanced Board Card Printing**.
2. On the Advanced Board Card Printing window, select the **BCard Template** from the drop-down list.
3. At the Reservation Status section, select **Reservation** to print an inactive Gift Card, or **Check In** to print an activated gift card, and then select the date to print.
4. Click **Print** to start the print job and select **Yes** when prompted.

Printing from Board Card Wizard

The Board Card Wizard is a guided function that allows you to print the Gift Card easily. In the Management module, select **Front Desk** and then **BoardCard Wizard** from the drop-down list.

1. Click **Next** to begin the print process.
2. In the ‘What type of BCards would you like to print?” window, select **Gift Cards** and click **Next**.
3. In the 'Would you like to print BCards ….' window, select one of the options and click **Next**.
4. Select the additional print criteria, if any, and then click **Next**.
5. Select the preferred sort order and click **Finish** to process the print job.

Figure 10-194 BCard Printing Wizard



Printing Individual Gift Card

You can print the Individual GC from **Management, Cashier and Gift Card** function. See Gift Card Creation section for more details.

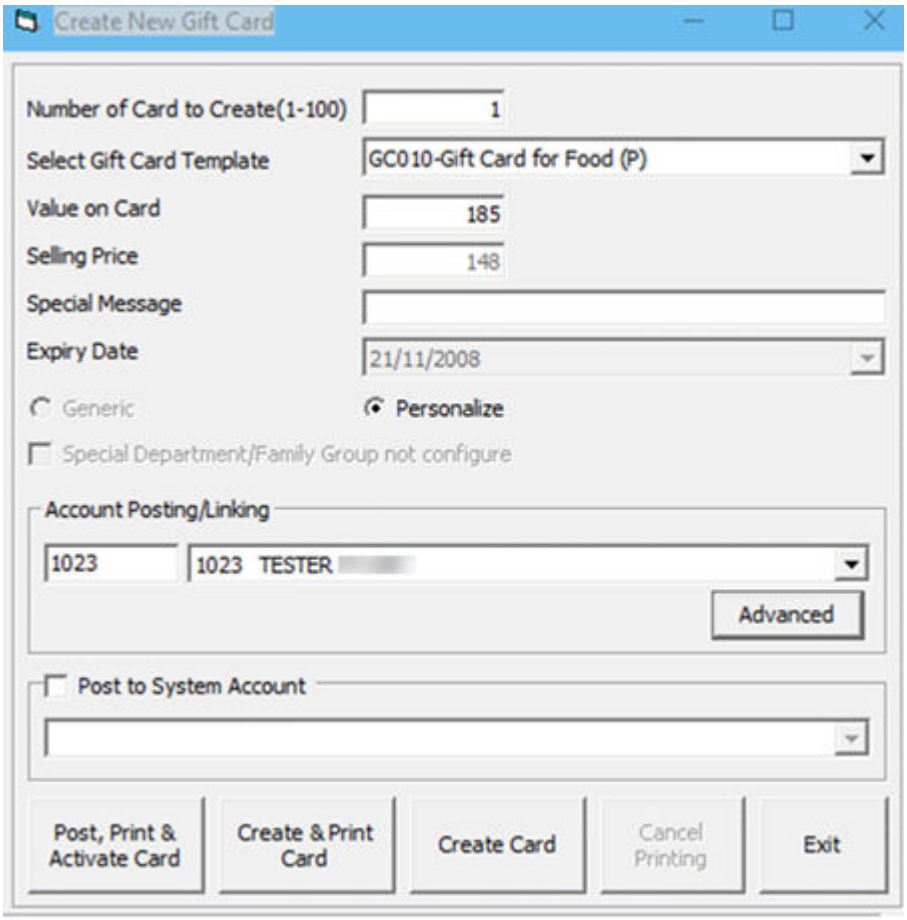
Gift Card Creation

If you have the access rights to Gift Card Handling, you can create and print the physical Gift Card without associating it with a Gift Card template. In addition, you can create, print, activate in real-time, and post your new Gift Card purchase to the Guest Account.

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1. Log in to the Management module, Cashier, Gift Card.
2. Click **New Gift Card**.
3. In the **Create New Gift Card** window, enter all relevant information in the respective fields.

Figure 10-195 Create New Gift Card



Field Name	Description
Number of Card to Create	Defines number of cards to create.
Gift Card Template	Refers to **Gift Card Template Setup**. When a template is selected, all predefined settings will populate accordingly.
Value on Card	Defines the card value if the card is a **Percentage** pricing type. System will recalculate the **Selling Price** based on the value entered.
Selling Price	The **Selling Price** is re-calculated based on the value entered, unless template selected is a **Fix Valu**e type, then field is grey out.
Special Message	Special notification message.
Expiry Date	Expiry Date auto calculates based on the setup and *not* editable.

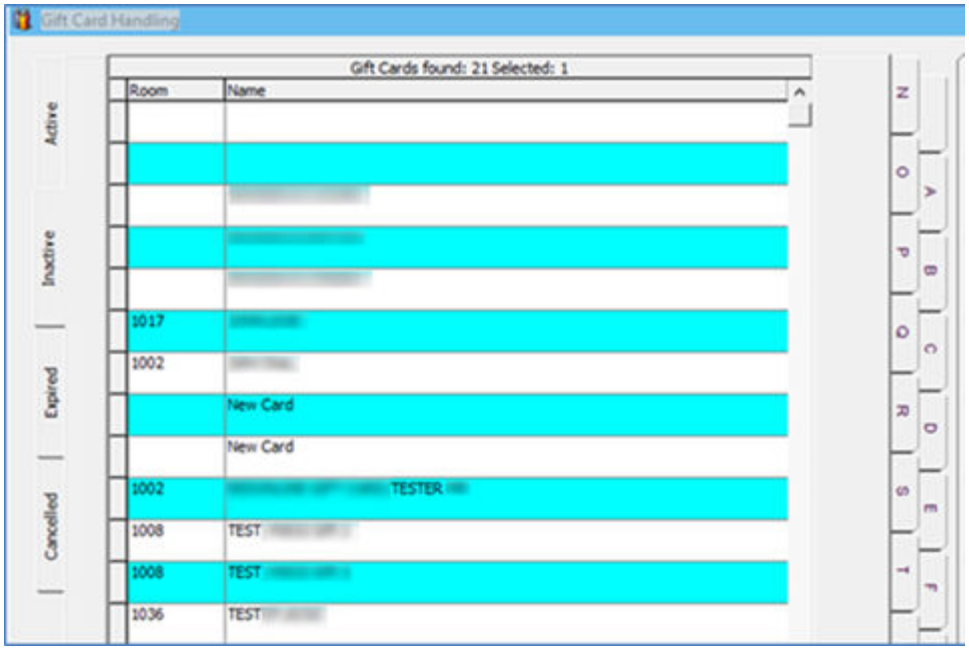
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Field Name	Description
Generic/Personalize	Define the type of card: Generic or Personalize.
Enable Usage for Special Department/Family Group	Define if Gift Card is allowed for use in special eligibility departments.
Account Posing/Linking	Account Posting/Linking of guest account is optional during creation. However, if no account is linked, it is *not possible* to activate the gift card.
Advanced	Enable selection of multiple guest reservations. The number of gift card printed must be set to one, or else an error message prompts: **When select multiple guest, the number of card must set to one**.
Post to System Account	Check when prepaid Gift Cards are imported. The application posts the purchase to System Account and the buyer is assigned to the Guest Account when it is select manually.
Post, Print & Activate Card	Post, print and activate card when GC template is assigned.
Create & Print Card	Create and print without activation. However, you can activate later when the Gift Card is sold is to customer. The gift card purchased will be printed and encoded.
Create Card	Create Gift Card without activation or print.
Cancel Printing	Cancel the print job. Applicable when printing more than one card.

4. The newly created cards will appear in the Gift Card Listing in the following tabs.
   - Inactive
     - New Cards without guest account assigned.
     - Cards created with ‘Create & Print Card’ carry the Gift Card number.
   - Active
     - Cards created using ‘Post, Print & Activate Card’ function and guest name will appear.

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Figure 10-196 Gift Card Account Listing



> **Note**
>
> Gift Card creation and activation is available to ‘Expected Guests’ only.

Gift Card Activation

The physical gift card does not have any value until it is sold, in which a cashier or agent would select a pre-defined value or manually enters the purchased credit onto the card by way of creation and activation. The gift card must at least have a cabin associated to it, and can be only activated for guest's that has cabin assigned .

All gift cards generated that are not activated are shown in the **Inactive** tab. You are allowed to make changes to the Guest account as well as Gift Card template.

1. In the **Gift Card Handling** window, select the **Gift Card** from the list and click **Activate Card**.
2. The application will prompt an **Edit Gift Card** form for the Guest Account or Gift Card template to be assign if they are not present.
3. The card information is transposed to the **Active** tab upon activation.
4. The Gift Card balance and posting status is also reflected in the Gift Card Info tab, and the purchased value is posted to the guest account as ‘Gift Card Posting’.
5. Under the **Guest Info** tab in the **Guest Handling** window, select the guest account and click **Gift Card** to associate the card.

Reprinting of Cards

A guest may request for a reprint when it is lost or misplaced. This process will deactivate the earlier card issued.

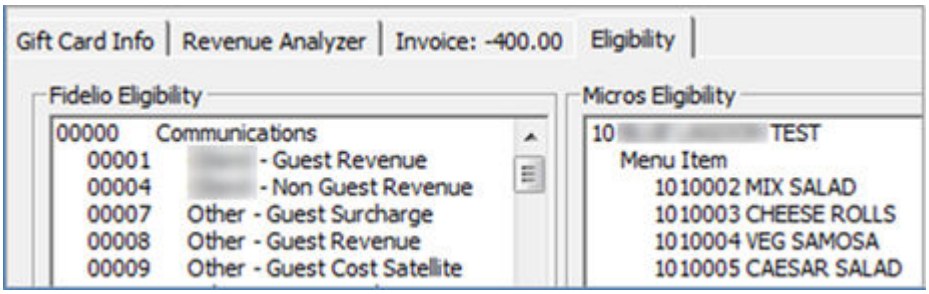
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1. In the **Gift Card Handling** window, click the **Print Gift Card** button. The Gift Card will print with an incremental GC number.

> **Note**
>
> Changing of Guest Account or GC Template is not allowed since the details for the card were initialized earlier.

2. Check the **Eligibility** tab to view the eligible department in SPMS and Simphony of the selected Gift Card.

Figure 10-197 Gift Card Eligibility



3. The program would not activate the Gift Card if the associated guest account exceeds its credit limit, and posting is disabled or under expected status.

Gift Card De-Activation and Re-Activation

A guest may request to de-activate the Gift Card for various reason. Deactivation functionality is only available when a Gift Card has been activated, and reactivation is only possible when the card is associated with an existing Guest account.

1. In the **Gift Card Handling Active** tab, select the card and click **De-Activate Card**.
2. Select the **De-Activation Reason** from the drop-down list or enter a reason using the free text option. Card information are transposed to the **Inactive** tab.
3. To re-activate the card, click **Re-Activate Card** and select the **re-activation reason** from the drop-down list.

> **Note**
>
> The De-Activation and the Re-Activation process only changes the Gift Card status and posting allow status instead of re-posting the transaction.

Gift Card Cancellation

A gift card can be cancelled due to inactivity or other reasons. It is not reversible once the card is cancelled, and cancellation is only permissible for *activated card with zero balance*.

1. In the **Active** tab, select the gift card and click **Cancel Card**.
2. At the confirmation prompt, click **OK** to continue

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> **Note**
>
> This would disassociate the guest details from the card and no posting will occur in the guest account.

3. At the prompt “There is no undo to cancel card operation, do you want to proceed?” select **Yes**.
4. Select the **Cancellation Reason** from the drop-down list or manually enter the reason and, then click **OK** to proceed with cancellation.
5. The card information is transposed to the *Cancelled* tab, with its status shown as Cancel.

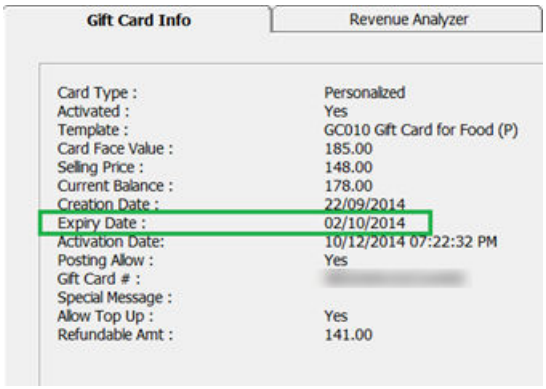
Gift Card Expiration

As cards are sometimes lost or forgotten, the Gift Card is no longer valid for posting after its expiration. To minimize fraud, the remaining balance would not be refunded, be it for guest or crew. Expiration is triggered based on the setting in System Parameter Setup. Once the card expiry date is past the system date, the Gift Card status is automatically changed to expired, and information is transposed to the *Expired* tab in the Gift Card Handling window.

The following activity occurs on expiration of the card:

- System automatically sets the posting to *Posting Not Allow*.
- Remaining balances are transferred to the System Account as define in **Financial Department Setup, Gift Card Template setup**.

Figure 10-198 Gift Card Expiration Information



It is possible to alter the expiration of an activated gift card provided the expiry date is greater or equal to the current workstation date.

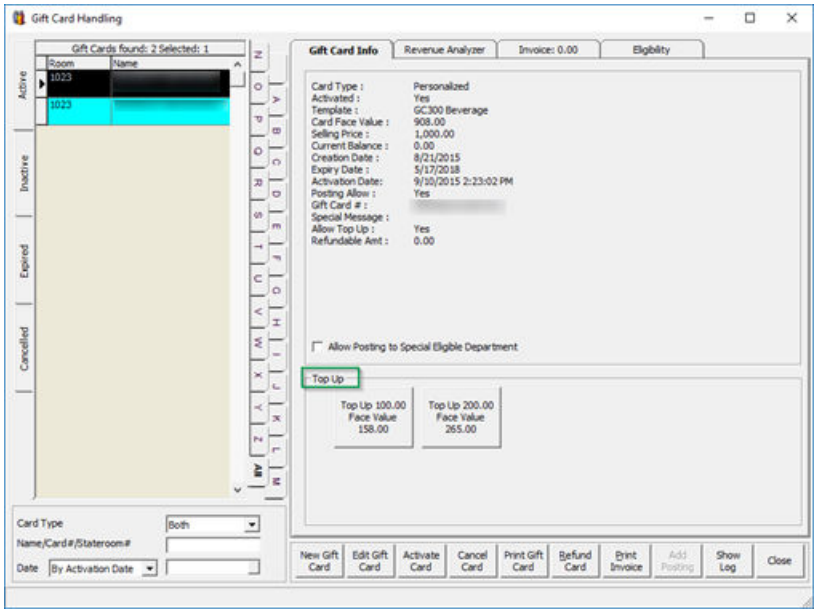
Gift Card Top Up

Value top up on current active card is permissible and the process is similar to a gift card purchase, with the top up charges being posted to the guest account.

There are 10 top-up options available for guests to choose, and each top-up option can have a different selling price or value based on the setup in the GC (Gift Card) Template. However, the top up option is not available for expired, inactive, and cancelled Gift Cards.

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Figure 10-199 Gift Card Top Up Option



To Top up the value

1. Select the guest account from the **Active** tab.
2. At the **Top Up** section in **Gift Card Info** tab, select the top up value, and then click **Yes** at the confirmation prompt.
3. A receipt is printed and a charge is posted to the guest account with the top up value added to the card.

Gift Card Refund

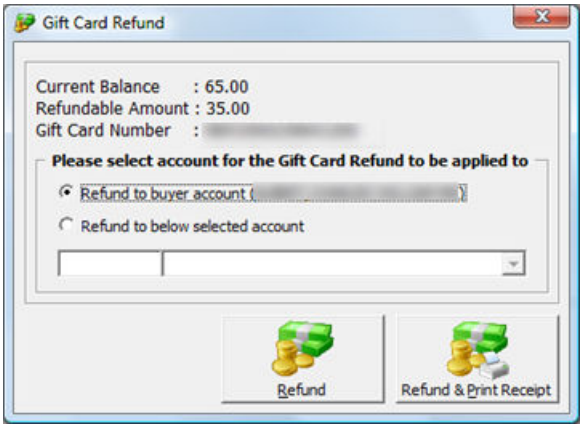
You can perform a refund for the remaining Gift Card balance to either the buyer or the selected passenger account, and prints the refund receipt. Refunds are allowable only if the following criteria are met:

- Card is still active and not expired.
- Has a credit balance after deducting the discounts given.

1. In the Gift Card Handling window, click the Refund Card.
2. In the Gift Card Refund window, select either **Refund to buyer account** or **Refund to below selected account** and select the account from the drop-down list.

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Figure 10-200 Gift Card Refund Window



3. Click **Refund** or **Refund & Print Receipt** to print a refund receipt.
4. Once the Gift Card balance is refunded, the Gift Card automatically becomes expired.

> **Note**
>
> For cards that have multiple top up transactions, the program refunds the first top up selling price. If it still has a balance, the next top up selling price will be refunded. The calculation is = *[Face Value – Total Posting] – [Face Value – Selling Price]*. If the current balance is less than *[Face Value – Selling Price]*, the refund amount will be zero. For more refund scenarios, see Appendix E. Gift Card Refund Scenarios

Gift Card Quick Refund

Gift Card Quick Refund allows you to refund the unused balance on the gift card based on the selection criteria.

Table 10-42 Gift Card Quick Refund

Field	Description
Gift Card Expiry Date	Filter to display cards where the expiry date is the same or less than date defined.
Gift Card Template	Display active cards of selected template.
Included Unactivated Prepaid Gift Card	Include prepaid Gift Card (GCDT_PREPAID=1) linked to guest account where the Gift Card expiry date is based on the guest's disembarkation date.
Included Gift Card with Refund Amount =0, and Balance >0	Included Gift Card with refundable amount = $0 and balance is not $0.

1. Log in to the **Management module, Cashier, Gift Card Quick Refund**.
2. Click **Search Gift Card** to search for all valid Gift Cards, or use the filters to select the desired information.
3. In the guest list Selected column, deselect the checkbox of cards to *exclude* from the refund process.

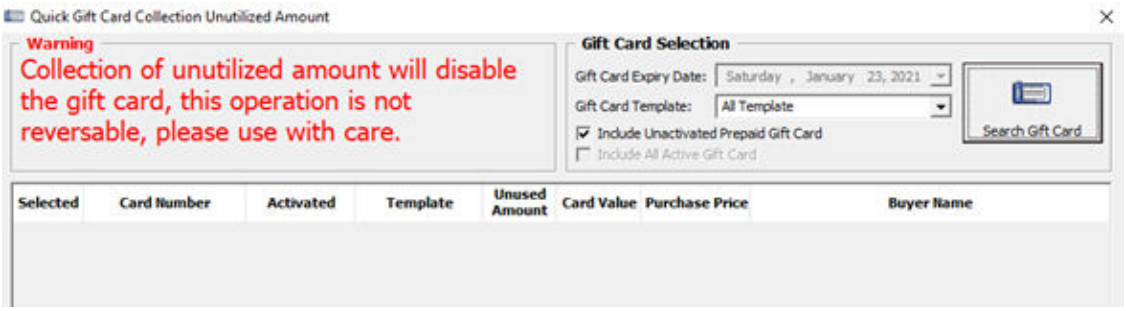
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4. Click **Proceed** to set all selected Gift Cards to Expired and refund the amount to the default buyer account. The process is not reversible.

Gift Card Quick Collect

Gift Card Quick Collect enables the Chief Purser to make a quick collection of unutilized Gift Card amounts at the end of the cruise. All unutilized amounts collected will be posted to the Gift Card revenue department and a report is generated.

Figure 10-201 Gift Card Quick Collect



1. Log in to the **Management module, Cashier, Gift Card Quick Collect**.
2. In the Quick GC Collection Unutilized Amount window, click **Search Gift Card** to populate valid Gift Cards into the grid list.

> **Note**
>
> The **Gift Card Expiry Date** field is set to the current system date by default and is disabled to prevent you from accidentally collecting unused Gift Card balances when guests are yet to disembarked. The system filters the Gift Card where Gift Card's expiry date is same as or smaller than the default date.

3. Select the **Gift Card Template** from the drop-down box to populate Gift Card by the selected template.
4. Select **Included Unactivated Prepaid Gift Card** to include prepaid Gift Cards not activated.
5. Deselect the **Selected** checkbox of each Gift Card to skip any account.
6. Click **Proceed** to post the unutilized GC amount to the GC revenue department as cruise revenue and set card as **Expired**.

> **Warning**
>
> This process is not reversible.

Gift Card Posting

Gift Cards can be posted from various modules such as Management, Casino, Shore Excursion, or FCUI. As the posting steps varies between modules, do follow the below steps for optimum result.

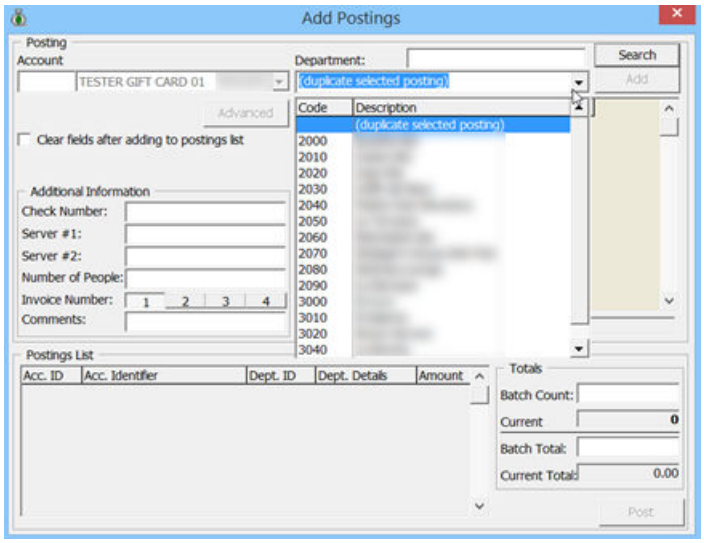
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Gift Card Posting from Management Module

1. Log in to the **Management module**, and select from the menu **Cashier, Gift Card.**
2. In the Gift Card Handling window, select **Add Posting**.
3. In the **Add Posting**

   form, only the eligible departments appear in the department drop-down list.
4. Select the **department**, enter the value in the respective sub-department, and click **Add**.

Figure 10-202 Add Gift Card Posting in Management Module

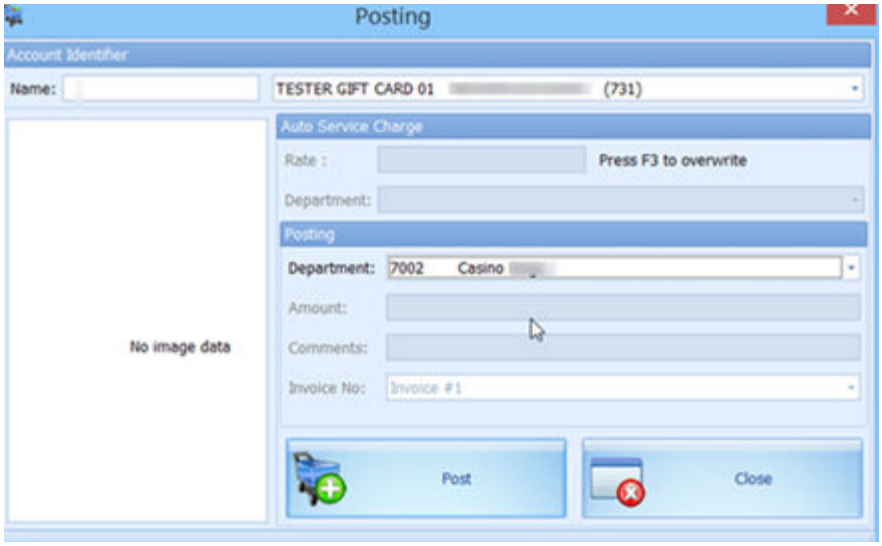


5. Click **Post** to confirm posting and deducting the sales from the GC account.
6. Once the GC balance becomes zero, the **Add Posting** button becomes disabled.
7. When a transaction is **Void**, the amount is credit back to the GC account.
8. When a discount is applied, the **Item Discount** or **Criteria Discount** on the sales transaction is credited to the Gift Card account.
9. **Move and Route** transactions from another account is acceptable in GC posting. For more posting scenarios, See Appendix F. Gift Card Posting in Management Module

Gift Card Posting in Casino Module

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Figure 10-203 Gift Card Posting in Casino Module

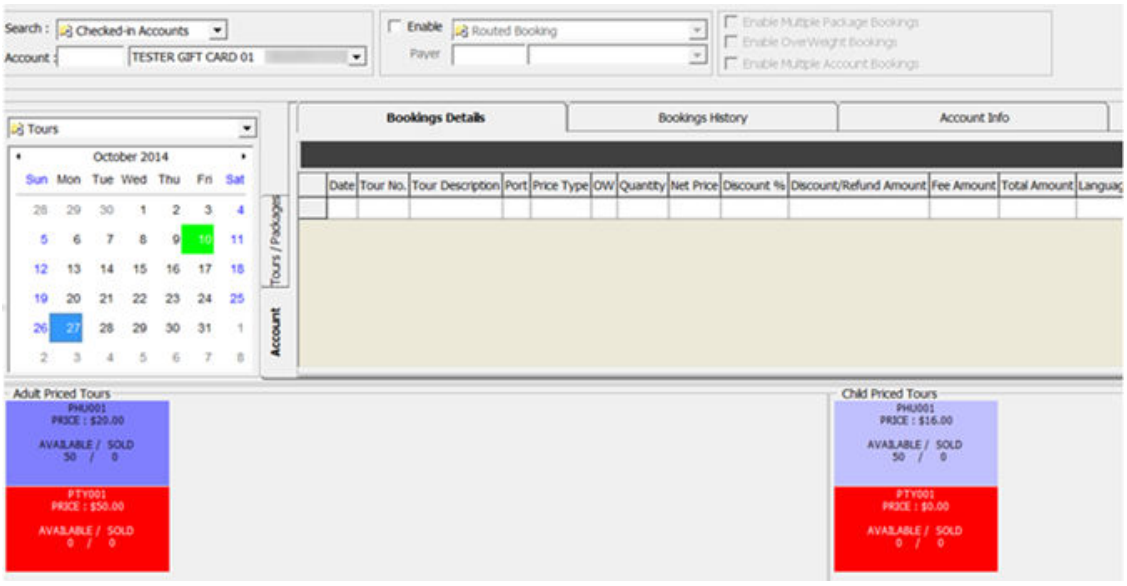


1. Log in to the **Casino module, Cashier,** or Posting.
2. In the Posting window Name field, enter the **name** or swipe the **Gift Card**.
3. Select the **Casino Posting Department** from the drop-down list, enter the Amount, and then click **Post** to post the charge.

For more posting scenarios, see Appendix G. Gift Card Posting in Casino Module

Gift Card Posting from Shore Excursion

Figure 10-204 Gift Card Posting in Shore Excursion Module



1. Log in to the **Shore Excursion module** and select **Bookings** or **Quick Bookings** from the Book menu.

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2. In the **Search box**, enter the name/cabin or swipe the GC to purchase an excursion. The excursion purchased will deduct from Gift Card account.

> **Note**
>
> Multiple Account Bookings is disabled upon swiping the Gift Card. Posting can route to the selected payer when enabling the Prepaid Booking option (payer can be a System account, Gift Card account or Guest account). The Wait list is not allowed for the Gift Card.

3. System credits the Gift Card account when the purchase is voided and posts the Cancellation fee, if any.
4. You can view the transaction purchased with gift card in:
   a. Excursion Handling, Account / Control No Handling, and Batch Ticket Printing window.
   b. All posted excursions by GC can be viewed in
      - View, Handling List.
      - View, Account/Control No. Handling window.
      - Batch Ticket Printing and Export window.

For more posting scenario, see Appendix H. Gift Card Posting in Shore Excursion Module

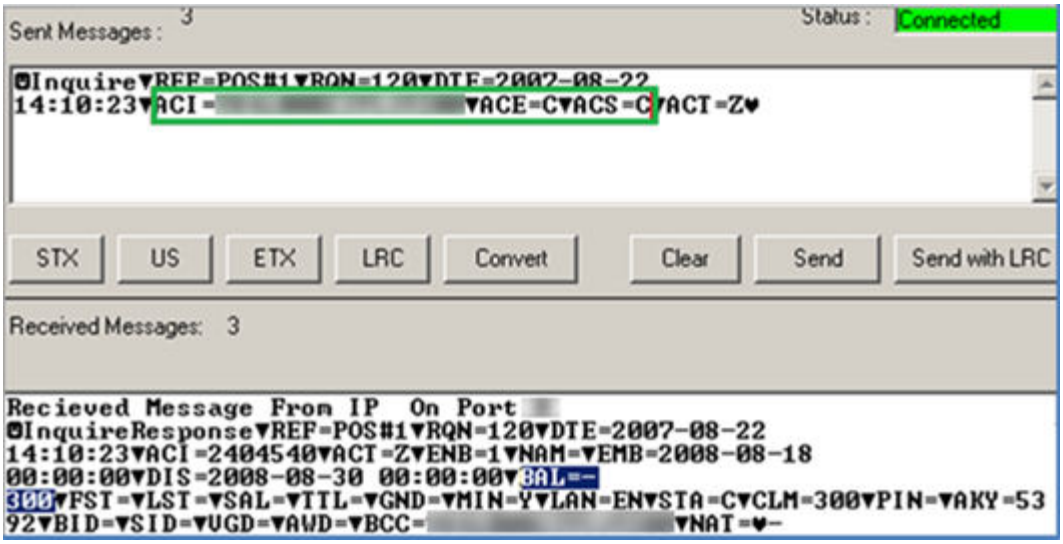
Gift Card Posting from FCUI

Third party vendors whose systems work with FCUI may require changing their systems in order to handle Gift Cards transactions. Thus, you must ensure that such vendors received the appropriate technical specifications (v7.3.4xx onwards) that include Gift Card message handling from the SPMS installer. The OHC Universal Interface is capable of accepting Inquiry messages from an external system, based on the variable passed to the system.

1. The Inquiry message must be set to ACT=Z for Gift Card type.
2. Define Gift Card status in ACS per the following.
   - Define **ACS = C** for inquiry about activated, de-activated, and cancelled Gift Card balance.
   - Define **ACS = R** for enquiry about inactive Gift Card balance.
   - Define **ACS = Z** for enquiry about expired Gift Card balance.

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Figure 10-205 Gift Card Posting in Universal Interface



3. Define the GC number in ACI. The balance shows the current value when the message is received.
4. The Universal Interface is capable of accepting **Posting, Book Excursion and Book Excursion Packages** from an external system.
5. Any purchase deducts from the Gift Card account.
6. The Universal Interface does not allow making any posting against invalid gift cards.

For more posting scenarios, see Appendix I. Gift Card Posting in Universal Interface

Gift Card Handling in Simphony POS

Gift Cards can be sold, activated or top up from Simphony POS System, and their postings are channel to OHC SPMS. Both systems. It require the latest ISL Script patch. Refer to the *Prerequisite, Supported Systems, and Compatibility* section.

The following section describes the Gift Card Handling for Simphony System.

Purchasing New Gift Card

Purchase or activation of Gift Cards at the POS terminal requires a guest cabin card and this is limited to card types that are:

- Personalized — without any guest.
- Generic — with or without guest account assignment.

Purchasing a gift card is not permissible when:

- The Gift Card type is personalized and already assigned to a guest account. The system prompts you with, “This is a Personalized Card.”
- The gift card is prepaid. System prompts you with, “This is a prepaid Gift card.”

To purchase a card at POS revenue centre:

1. Select **Buy Gift Card**.

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2. Swipe the pre-printed Gift Card on the magnetic card swipe. If the new Gift Card is valid, the Gift Card transaction adds to the purchase list.

> **Note**
>
> The **maximum** purchase allowed is 10 Gift Card transactions per individual.

Figure 10-206 Gift Card in MICROS Workstation



3. Select **Remove Gift Card** to remove the Gift Card from the purchase list.
4. Select **Cancel** to cancel the transaction.
5. For more purchases, swipe another Gift Card and a valid card will be added into the purchase list.
6. If the new Gift Card does not have a pre-defined template, the **Gift Card Template menu** will appear.
7. Enter the **Gift Card value** if Gift Card pricing type is pre-define as a ‘percentage’.

> **Note**
>
> This can only be defined after the value is provided as the system defaults the value to two decimal points.

8. Select **Pay** to confirm the transaction.

> **Note**
>
> When making payment for the Gift Card, you must first swipe the guest’s boarding card at the POS terminal for the purchase to post to the guest’s account and print a receipt.

Activating Gift Card

A Gift Card can be purchased from the Front Desk and activated through the POS terminal. Such gift cards cannot be activated through **Cabin Inquiry** when:

- The Gift Card type is Generic whether with or without a guest account assigned. Only the Gift Card information appears when swiped through the reader.

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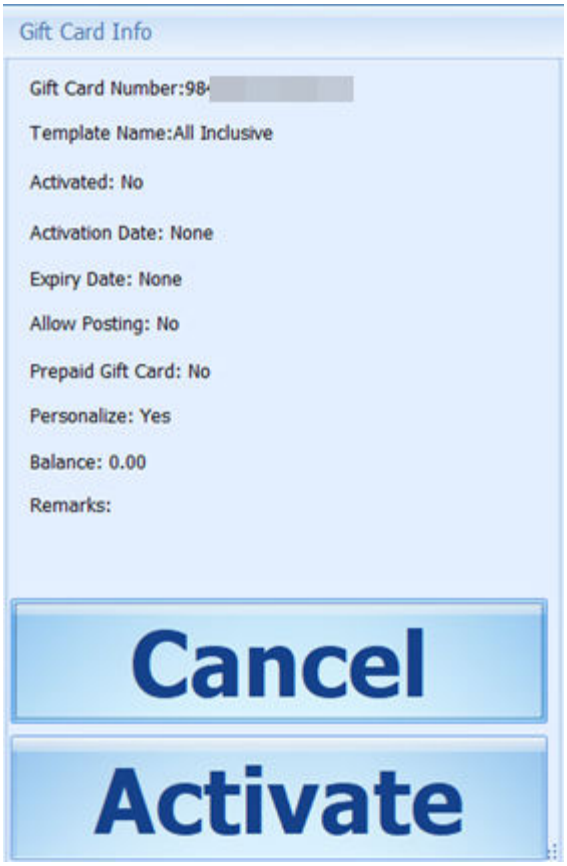
- The Gift Card type is Personalized without a guest account assigned, and only Gift Card information appears when swiped through the reader.

Guests can activate their gift card through **Cabin Inquiry** when:

- The Gift Card type is Personalized with a guest account assigned.
- The Gift Card is 'Prepaid'. The Prepaid gift card must match with the guest account assigned.

1. At the POS terminal, select the **Cabin Inquiry**.
2. Swipe the **pre-printed Gift Card** to display the Gift Card information.
3. To activate, select **Activate** them swipe the guest board card as a verification that the Gift Card belongs to the same guest account.

Figure 10-207 Activate Gift Card in MICROS Workstation



Gift Card Posting in POS Workstation

1. In the POS terminal, select **Cabin Inquiry**.
2. Click **Cabin Charges** to confirm the transaction.

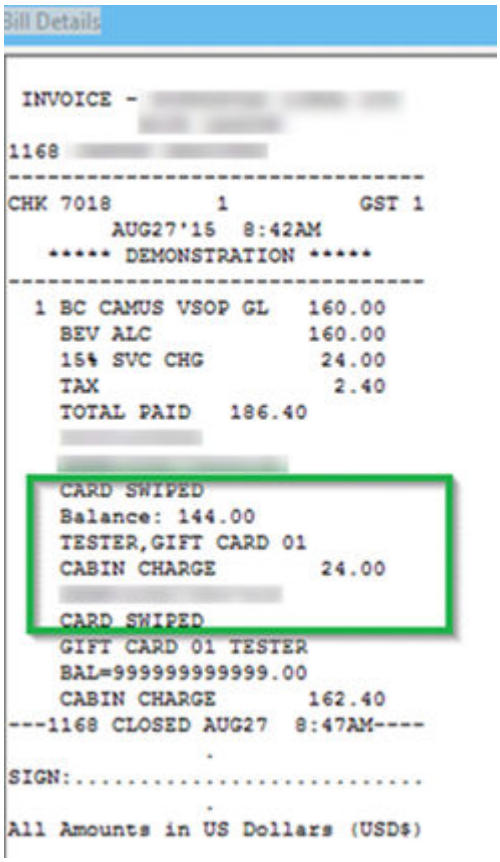
> **Note**
>
> Gift cards must be activated before checking out, otherwise the error, "GC is newer than check" appears.

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3. Swipe the Gift Card, followed by guest card validation.
4. If the Gift Card is not a prepaid Gift Card and/or not activated yet, the system prompts a message, **Gift Card Not Activated**.
5. The posting amount will be deducted against the Gift Card account if Gift Card is eligible on the selected posting. Swipe the Guest card again to complete the posting and print the purchase receipt.

> **Note**
>
> To display the cabin number for posting, uncheck the Data Extension **Hide Cabin Number from Posting Response** under Property Level. See Simphony Data Extension.pdf .

Figure 10-208 Bill Image of Gift Card Posting in POS Workstation



Prepaid Gift Card Posting

A Simphony posting can be settled using a prepaid Gift Card. When the system validates that the Gift Card as inactive during **Cabin Charge**, the system prompts a message to activate the Gift Card.

1. To activate the GC, the prepaid GC holder must be associated with the Guest account. Therefore, the guest card must be swipe in order to perform the Gift Card activation.

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2. A message “**Pax account not match with Prepaid Gift Card**” prompts if the Gift Card owner does not match the guest account selected.
3. Upon a valid guest card swipe, Simphony posts the item(s) to the Gift Card account.
4. An activation receipt is printed and the Gift Card puchase is posted to the System Account.

Multiple Gift Card Posting

Upon settlement of the check, if the amount is higher than the remaining balance of the Gift Card or certain transactions are not eligible for the Gift Card, you must swipe the guest’s card to settle the remaining balance of the guest check, or settle by cash prior to disembarkation.

The Simphony can split the payment method by cash or other gift cards in any eligible department. If the guest holds multiple gift cards that are eligible for the item(s) department, partial payment is allow by swiping each Gift Card during the posting.

1. Swipe the Gift Card follow by the guest card through the magnetic swipe. If both cards are valid, the system deducts the amount against the Gift Card account, followed by the subsequent card for the remaining balance.
2. The remaining balance allows you to post against Gift Cards, that are in eligible departments. If the Gift Card is not eligible for the posting, then then guest card can be used to settle the remaining balance.

Voiding a Gift Card Posting

Simphony allows Gift Card postings to be void before the cabin is charged, and credit the amount to the Gift Card account accordingly. Highlight the sales transaction and select **VOID**.

1. Select **Cabin Inquiry** and swipe the Gift Card to display the balance.
2. Re-open the closed check and void the posting.

> **Note**
>
> Voiding can only be performed on the same day as the transaction-posting. Otherwise, you must open a new check, select the same sales items, and then post a negative payment to the Gift Card account.

Gift Card Top Up in POS Workstation

Gift Card Top Up is available in the POS Terminal. See *Oracle Hospitality Cruise Shipboard Property Management System – Simphony POS Setup Guide.pdf*, section *OHCSPMSPOSInterface Functions* for available functions.

1. In **POS Terminal**, select **Top Up Gift Card** that you configured at the Simphony Server.
2. You will be prompted to swipe the Gift Card.
3. Select the Top Up value from the selection list. If the Gift Card does not allow Top Up, a message prompts ‘**Top Up not allow**ed’.

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Figure 10-209 Gift Card Top Up Selection in POS Workstation



4. Swipe the Guest Board Card to confirm. If the board card does not match the account, the system prompts **Pax ID not match**.
5. Upon successful top up, the charge posts to the guest account and a receipt prints out automatically.
6. The program allows you to void a top up transaction if done accidentally. This only applies when the top up amount is more than the current invoice balance. If the top up amount is less than current invoice balance, a message prompts **Voiding of top up value more than balance xx**.

Appendices

The following appendices will assist you in identifying the required system files to use with the latest Shipboard Property Management System (SPMS) version.

Appendix A. User Security Group

This section describes the User Security Groups available to the Gift Handling module. They are accessible in **OHC Launcher, Utilities, Security**.

Table 10-43 User Security Group

User Group No.	Security Reference No.	Description
Modules\Administration\Menu\ Administration\Gift Card Setup	838	Gift Card Eligibility Setup
	839	Gift Card Template Setup
	840	Gift Card De-Activation Reason
	841	Gift Card Re-Activation Reason
	842	Gift Card Cancellation Reason
	894	Gift Card Eligibility Group Setup
	895	Gift Card Template Group Setup
Modules\Data Import\Data Import	3059	Prepaid Gift Card

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Table 10-43 (Cont.) User Security Group

User Group No.	Security Reference No.	Description
Management\Menu\Cashier	3065	Gift Card Quick Collect
	3066	Gift Card Quick Refund
Management\Menu\Cashier\Gift Card	843	Gift Card Handling
	844	Create New Gift Card
	845	Edit Gift Card
	846	Activate Gift Card
	847	De-Activate Gift Card
	848	Re-Activate Gift Card
	849	Cancel Gift Card
	874	Print Gift Card
	875	Print Gift Card Invoice
	876	Add Posting
	877	Void Posting
	878	Criteria Discount
	879	Item Discount
	880	No Print
	881	Close Posting
	882	Move and Route
	883	Show/Hide No Print
	884	Show Revenue Analyzer
	885	Show Invoice
	886	Show Balance (Balance in Gift Card Info tab is auto hide)
	887	Enable Special Eligible Department
	3064	Refund Gift Card
	3025	Top Up Gift Card

Appendix B. SPMS Parameters

This section describes the **Parameters** available to the Management module. They are accessible in **Administration module, System Setup, Parameter.**

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Table 10-44 PAR Group General

PAR Name	PAR Value	Description
Gift Card Expiration Process	0,1	**0– During Change System Date** Gift card expires after the system date. Example: Gift Card Expiry Date on 19/08/2021. Gift card expires when system date switches to 20/09/2021. **1- During Change System Cruise** Gift card expires after system cruise has change. Example: Gift Card Expiry Date on 19/08/2021. Gift Card expires when system cruise change to 19/08/2021.
Expiry Date for prepaid un-activate card		Number of days after guest disembarks.
Action For Open Balance Gift Card during check-out	0, 1, 2	Option to not to allow guest check out if there is a Gift Card with an open balance linked to the guest. Parameter value = 2 • If Gift Card has already expired and with negative balance, check out guest is allowed. • If gift card is still active and with balance, check out guest is not allowed. Parameter value = 1 • If Gift Card is already expired and with negative balance, check-out is allowed and no message prompt. • If gift card is still active and with balance, prompt message to decide allow or disallow check-out. Parameter = 0 • always allow check-out even Gift Card has open balance .

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Table 10-44 (Cont.) PAR Group General

PAR Name	PAR Value	Description
Auto Post to Guest Acc when insufficient GC Bal		Gift Card balance = 0, System prompts, "The Gift Card balance is zero". If the posting amount > Gift Card balance, system posts the balance amount to guest account. When voiding, system voids the transaction and revert amount to the same transaction payer. If check credit limit PAR ON, by posting the insufficient Gift Card balance to guest account, system prompts credit limit exceeded.

Appendix C. Sample Gift Card Import File Layout

This section describes the file layout of Gift Card data import to be imported to the OHC Data Import or OHC DGS ResOnline module.

GC200 1046454 780 900 1046454 9941000252764906

GC200 1046405 780 900 1046405 9941000251764909

Appendix D. Sample Gift Card DGS RESONLINE File Layout

Below is the sample XML file format for Gift Card Import through the OHC DGS RESONLINE module.

```
<DataSetReservations>
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Appendix E. Gift Card Refund Scenarios

- Scenario 1: no posting and no top up. Full refund the selling price.

  Selling price = 780

  Face value = 900

  Refundable amount = 780

- Scenario 2: no posting and have top up. Full refund for both Gift Card and top up selling price.

  Selling price = 780

  Face value = 900

  Top up selling price = 140

  Top up face value = 200

  Refundable amount = 920

- Scenario 3: with posting and no top up

  Selling price = 780

  Face value = 900

  Posting amount = 133

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Refundable amount = 667 [(900–113)-(900–780)]

- Scenario 4: with posting and top up. Refund from the first Gift Card, if still have balance from the first Gift Card, the next top up selling price will fully refund.

  Selling price = 780

  Face value = 900

  Top up selling price = 140 x 2 = 280

  Top up face value = 200 x 2 = 400

  Posting amount = 121 + 123 + 125 = 369

  Refundable amount = 691

  1st card refund = (900 – 369) – (900 – 780) = 411

  2nd refund from top up = 280

- Scenario 5: with posting more than original purchase amount and with top up. Refund for first Gift Card purchase offset. The rest of top up will get full refund.

  Selling price = 780

  Face value = 900

  Top up selling price = 140 x 2 = 280

  Top up face value = 200 x 2 = 400

  Posting amount = 800

  Refundable amount = 280

  1st refund from card: (900 – 800) – (900 – 780) = -20 No refund

  2nd refund from top up: 280

- Scenario 6: with posting more than original purchase amount and top up amount. Nothing to refund from first Gift Card purchase, refund from the first top up + fully refund on 2nd top up.

  Selling price = 780

  Face value = 900

  Top up selling price = 140 x 2 = 280

  Top up face value = 200 x 2 = 400

  Posting amount = 800 + 170

  Refundable amount = 210

  1st refund from card: (900 – 900) fully utilized. The remain 70 will refund from 1st top up

  2nd refund from 1st top up: (200 – 70) – (200 – 140) = 70

  3rd refund from 2nd top up: 140

- Scenario 7: nothing refund due to posting exceeded refundable amount

  Selling price = 780

  Face value = 900

  Top up selling price = 140 x 2 = 280

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Top up face value = 200 x 2 = 400

Posting amount = 800 + 170 + 280 = 1250

Refundable amount = 0

1st refund from card: (900 – 900) fully utilized. The remain 350 will refund from 1st top up

2nd refund from 1st top up: (200 – 200) fully utilized. The remain 150 will refund from 2nd top up

3rd refund from 2nd top up: (200 – 150) – (200 – 140) = -10 No refund

- Scenario 8: Void Top Up and get refund.

  Selling price = 780

  Face value = 900

  Top up selling price = 140 x 2 = 280

  Top up face value = 200

  Posting amount = 750

  Refundable amount = 140

  Refundable amount = 0 after void top up

- Scenario 9: Refund where Gift Card Balance was fully utilize.

  Gift Card Refundable Amount show ‘Not defined’. Refund button disabled.

- Scenario 10: Refund where Gift Card is prepaid and un-activated.

  Gift Card Refundable Amount show ‘Not defined’. Refund button.

Appendix F. Gift Card Posting in Management Module

Scenario 1: Posting when credit limit is exceeded.

System does not allow posting when the Gift Card account has exceeded the credit limit.

Result: System does not allow posting when Gift Card account has exceeded the credit limit.

Scenario 2: Move posting to Gift Card has exceeded credit limit.

System does not allow Move Posting to Gift Card when the credit limit exceeded.

Result: Message prompt shows Gift Card’s balance is not sufficient.

Scenario 3: Move Posting to Inactive, Expired & Cancelled Gift Card.

System does not allow Move & Route to Expired, Cancelled & Inactive Gift Card.

Result: Message prompt upon swiping expired, inactive & cancelled Gift Cards in Search box when attempting to Move & Route sales transaction.

Scenario 4: Move posting to non-eligible department.

System does not allow moving Gift Card posting to non-eligible department.

Result: Message prompt Move & Route is not allow to post in non-eligible department.

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Appendix G. Gift Card Posting in Casino Module

Scenario 1: Add posting to Gift Card is over limit.

The program first checks the credit limit department (if defined in Financial Department setup) followed by Gift Card balance.

Result: Message prompts when posting if Gift Card balance is less than zero.

Scenario 2: Add Gift Card posting to non-eligible department.

System does not allow adding a Gift Card posting to non-eligible department.

Result: Message prompt shows Gift Card is not eligible for that department.

Scenario 3: Add posting to Expired, Inactive & Cancelled Gift Card.

System does not allow add posting to Inactive Gift Card. Expired & cancelled Gift Card are not able to search upon swipe Gift Card in Search box.

Result: Message prompt shows Gift Card not activated.

Appendix H. Gift Card Posting in Shore Excursion Module

Scenario 1: Post Gift Card posting to non-eligible department.

System does not allow adding Gift Card posting to non-eligible department.

Result: Message prompt shows Gift Card is not eligible in shore excursion department and any attempted posting will be cancel.

Scenario 2: Add posting to Gift Card if exceeded credit limit.

System does not allow adding posting to Gift Card if exceeded credit limit.

Result: Message prompt shows Gift Card has exceeded its credit limit.

Scenario 3: Add posting to Expired, Inactive & Cancelled Gift Card.

System does not allow add posting to Inactive, Expired & Cancelled Gift Card upon swipe Gift Card in Search box.

Result: Message prompt upon swipe expired, cancelled or inactive Gift Card in Booking or Quick Booking window > Search box.

Appendix I. Gift Card Posting in Universal Interface

Scenario 1: Add posting to Gift Card that exceeded credit limit.

System does not allow adding posting to Gift Card that has exceeded its credit limit.

Result: Message prompt indicates that Gift Card has exceeded its credit limit.

Scenario 2: Post Gift Card posting to non-eligible department.

System does not allow add Gift Card posting to non-eligible department.

Result: Message prompts indicates that Gift Card is not eligible to the department.

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Scenario 3: Post Gift Card posting to De-Activated Gift Card.

System does not allow adding Gift Card posting to de-activate Gift Card.

Result: Message prompt indicates that Gift Card is disabled.

Scenario 4: Post Gift Card posting to Expired Gift Card.

System does not allow adding Gift Card posting to Expired Gift Card.

Result: Message prompt indicates that Gift Card is expired on a given date ‘dd/mm/yyyy’.

Scenario 5: Post Gift Card posting to Inactive Gift Card.

System does not allow adding Gift Card posting to Expired Gift Card.

Result: Message prompt indicates that Gift Card is not activated.

Scenario 6: Post Gift Card posting to Cancelled Gift Card.

System does not allow add Gift Card posting to a Cancelled Gift Card.

Result: Message prompt indicates that Gift Card is cancelled.

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11

Launch Panel

The Launch Panel serves as the gateway to access the SPMS programs. In addition to providing platform functionality, it also manages user access to the system.

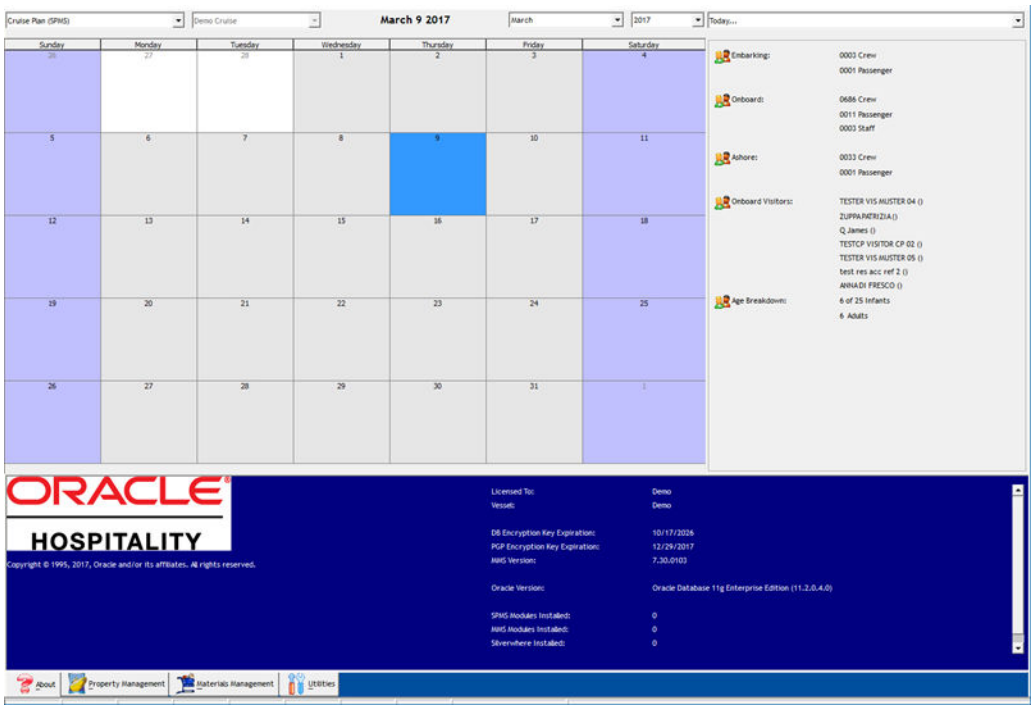
Launch Panel Overview

The Launch Panel is the main panel where you access the Oracle Hospitality Cruise Shipboard Property Management System (SPMS) modules. Application shortcuts are created for ease of access, allowing you to launch applications from a single location.

Event Overview

The Event Overview screen is a planner shared with other users that shows important information such as passengers expected to embark, cruise plans and so forth.

Figure 11-1 Launch Panel Event Overview



At the top of the Launch Panel, you can select the information to display using the following filters:

- **Event type:** Cruise Plan, Cruise Plan-with time, expected to embark
- **Vessel:** Current Cruise

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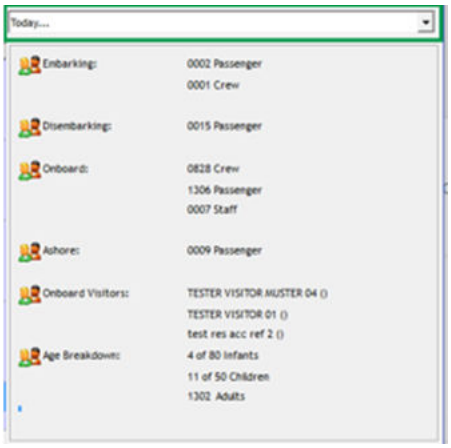
- **Date:** Month / Year

Event Summary Overview

The right pane of the Event Summary screen displays a summarized view of important information based on the following filters:

- Today… (Expected Embarking of the day)
- Port Agent
- System Check
- User Online
- Vendor

Figure 11-2 Launch Panel Event Summary



System Status Overview

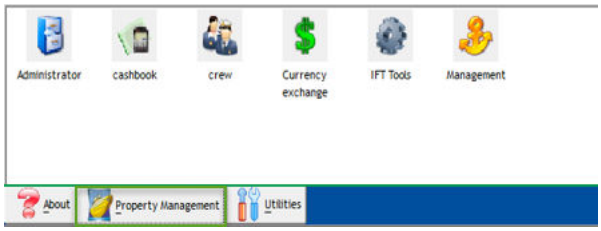
The System Status Overview displays the important system information such as Vessel, Database (DB) Encryption Key Expiration Date, Pretty Good Privacy (PGP) Encryption Expiration Date, Material Management System (MMS) Version, Oracle Database Version, and so forth.

Property Management Tab

The Property Management tab lists the applications added to the SPMS database. Added applications are shown on the panel for quick access. In addition to that, the added applications will be checked by SPMS clients to ensure that the latest version of the applications are distributed to the client machine. You can add applications to the SPMS database through the Launch Panel by using the **Add Function** or through the F12 function key to bring up the application upload form. Adding applications to SPMS database would require SPMS Administrator login privilege.

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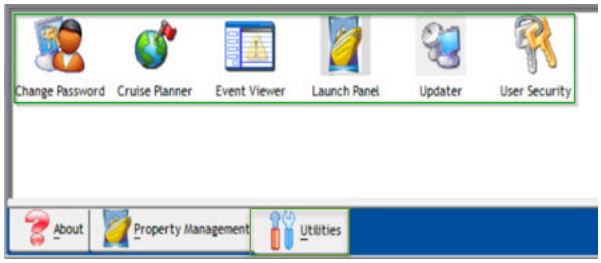
Figure 11-3 Property Management Tab



Utilities Management Tab

The Utilities Management tab allows you to:

1. Grant or revoke application user access, and
2. Add or update applications to SPMS database.



Launch Panel Application

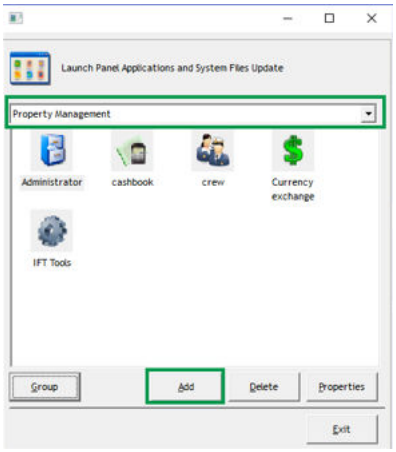
This section describes the steps to upload the required application into the Launch Panel.

Adding an Application

1. Run the **Launch Panel** from Oracle Hospitality Cruise folder.
2. Right-click the blank space in the tab and select **Add** or press **F12** to open the Launch Panel Application and System File Update window.
3. Select the group from the drop-down menu.

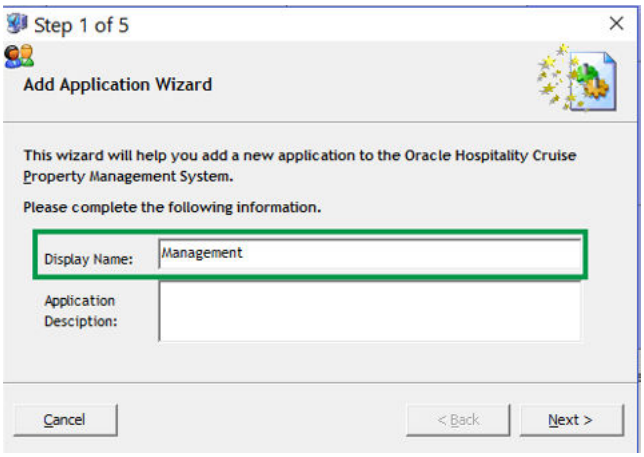
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Figure 11-4 Launch Panel Applications and Systems File Update



4. Click **Add** to open the Add Application Wizard dialog box.
5. In the Display Name field, insert the **program name** you want to add, and click **Next**.

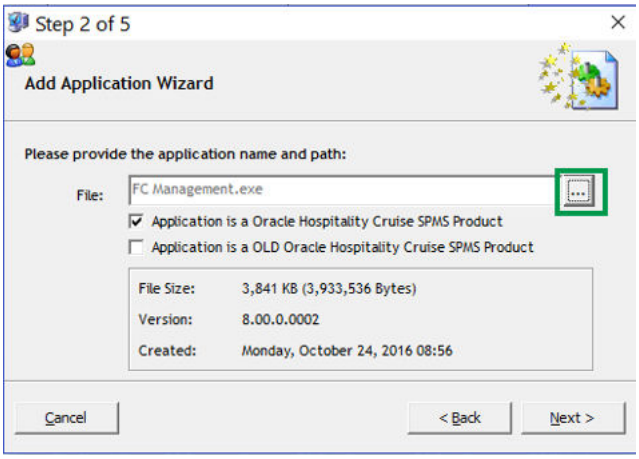
Figure 11-5 Add Application Wizard Step 1



6. Click the horizontal **ellipsis** button and browse to the application location.
7. Select the required program to add and then click **Next**. The application's file size, version and the date created appeared beneath the application name.

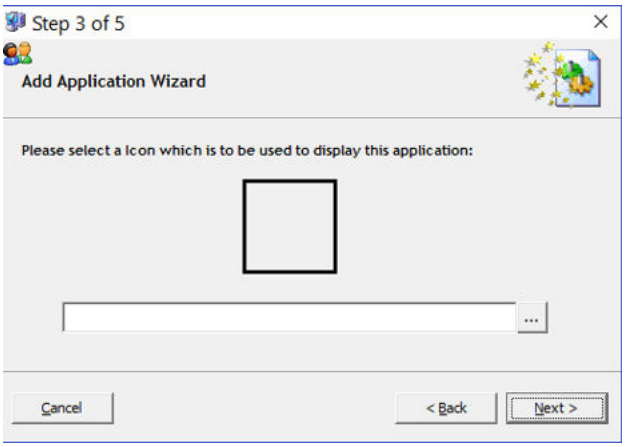
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Figure 11-6 Application Wizard Step 2



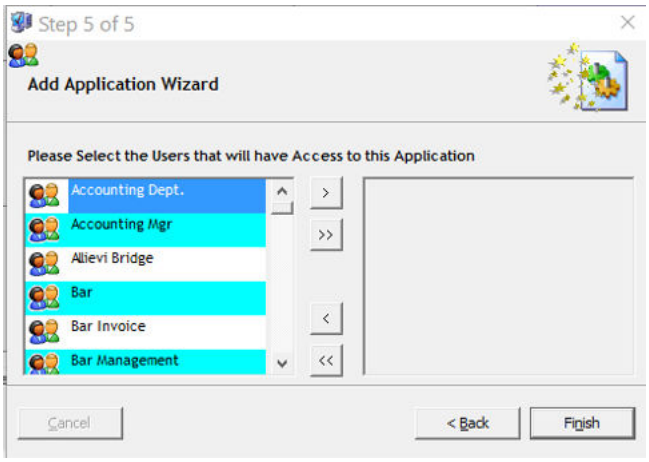
8. Select an icon for the application or click **Next** to use the system default icon.

Figure 11-7 Application Wizard Step 3



9. Select the **users** for this application and then click the **right-angle bracket (>)** to enable the access or click the **double right-angle bracket (>>)** to enable all.

Figure 11-8 Application Wizard Step 5



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10. Click **Finish** and exit the application.

Inserting an Application Using F12 Key

1. Run the Launch Panel program from Oracle Hospitality Cruise folder.
2. Press the **ALT key** to bypass the Updater and click the woman icon to log in.
3. In the Launch Panel, press the **F12** function key to open the Launch Panel Applications and System Files Update window.
4. Select the **Property Management** category from the drop-down list and click **Add**, as shown in Figure 11-4. Following are the applications/programs for each of the categories:
   a. Property Management:
      - Administration.
      - Crew
      - Management
      - Tools or any executable that the user uses to perform their task.
   b. REGASM Files category:
      - Wrapper.dll
   c. System Files category
      - OHCSPMSBusiness.dll
      - OHCSPMSData.dll
      - OHCSPMSUI.dll
      - OHCSPMSMobile.dll
   d. Utilities category
      - Launch Panel
      - Updater
      - UpdaterWatchdog
      - UserSecurity
5. Exit the Launch Panel.
6. Run the Launch Panel again to access the application and allow the system to download the latest version from the server.

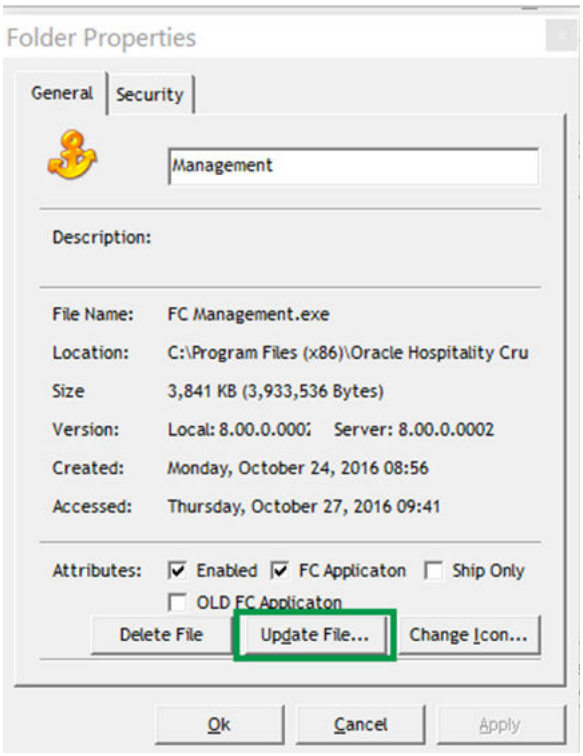
Manually Updating an Application

The following steps describe the process for updating each application manually when the latest application release becomes available.

1. Repeat steps 1 and 3 of the above section.
2. Select the **Property Management** category from the drop-down menu, select the desired program, and click **Properties**. See Figure 11-4.
3. In the Folder Properties window, click **Update File**.

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Figure 11-9 Launch Panel Application Folder Properties



4. Browse and locate the latest application file from the Oracle Hospitality Cruise folder and click the **Open** button.
5. During the update, a progress bar appears. Click **OK** to close the Folder Properties window. Repeat the above steps to update the other application.

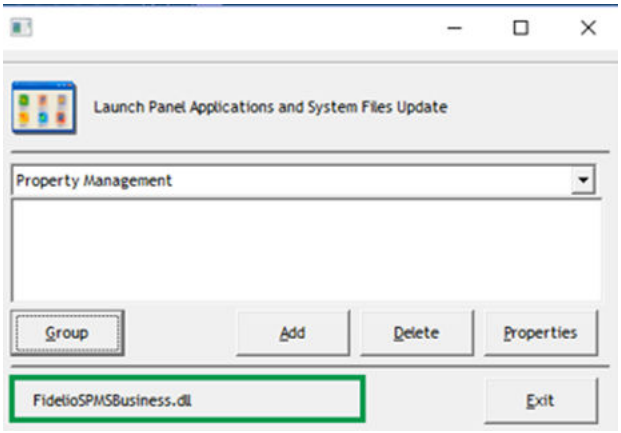
Updating the Application by Batch

This topic describes the steps for updating the registered application in the Launch Panel by batch.

1. Repeat steps 1 and 3 of Inserting an Application using the **F12** function key.
2. In the Launch Panel Applications and System Files Update window, click the **Group** button. See Figure 11-4
3. Browse and locate the folder where the latest application files reside.
4. The progress of the application files updated appears in the bottom left portion of the window in sequential order.

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Figure 11-10 Launch Panel Application Update in Progress



5. Once the update completes, all of the applications appear in the Launch Panel Application and the System Files Update window. Click **Exit** to close the window.

User Access Rights

User access to the system is managed in the User Security application. Accesses are granted at a group level, not at the individual level.

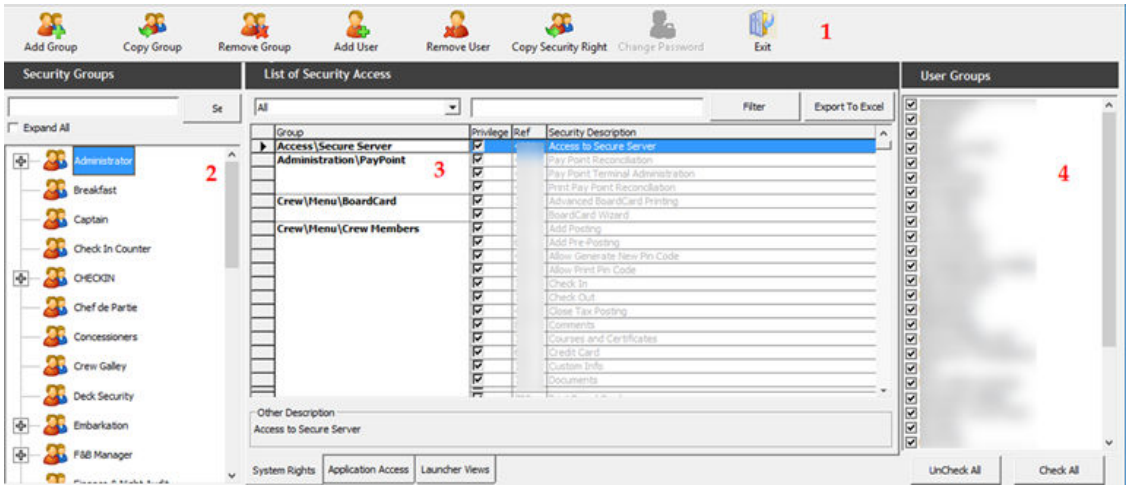
User Security

The User Security function comprises the following four main areas.

1. Menu bar
2. Security Group
3. Access Level by module
   - **Group:** Indicates the module the function is attached to.
   - **Privilege:** Indicator if the user rights are assigned.
   - **Ref:** System Security Access Rights Reference.
   - **Security Description:** Description of the security rights.
4. User Groups.

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Figure 11-11 User Security



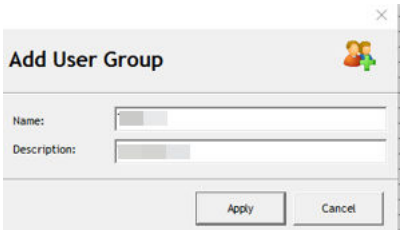
To access the User Security application,

1. Run the Launch Panel application and navigate to the **Utilities** tab.
2. Double-click the User Security application.

Creating a User Group

1. From the User Security screen, click **Add Group**.
2. In the Add User Group window, enter the new **User Group's Name** and **Description**. The name field is limited to six alphanumeric characters, and the description field is limited to 50 alphanumeric characters.

Figure 11-12 Add User Window



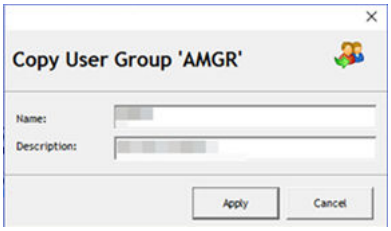
3. Click **Apply** to create the new user group. The newly created security group is located under the Security Groups and User Groups sections.
4. In the User Groups section, select the newly created group.
5. Navigate to the **System Rights** tab and select the respective **privilege** checkboxes to assign. You can use the search bar to look up the privilege by keyword.
6. Navigate to the **Application Access** tab and check mark the application this User Group can access.
7. Navigate to the **Launcher Views** tab and check mark the view this User Group can access.
8. Click **Exit** to close the application.

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Copying a Group

1. Select a Security Group from the Security Group list.
2. Click **Copy Group**.
3. In the Copy User Group **GroupName** window, enter the new group name and description.

Figure 11-13 Copy User Group



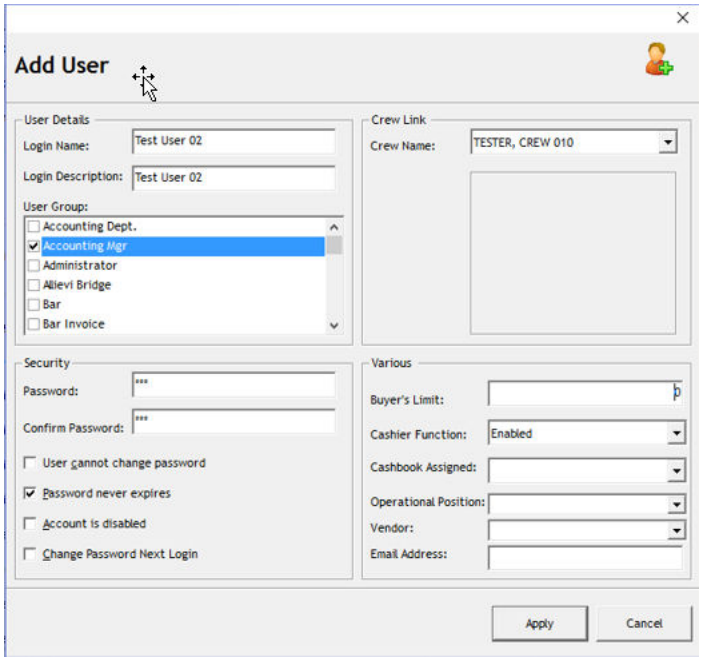
4. Click **Apply** to copy and add the group in a security group and user group.
5. The System Rights of the group are identical to the Security group you copied from

Removing User Group

To remove a group, select the **Security Group**, click **Remove Group**, and select **Yes** when prompted.

Adding a User

Figure 11-14 User Security Add User Window



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Table 11-1 Add User Window Field Definitions

Field Name	Description
Login Name	Login ID for the SPMS application.
Login Description	User full name
User Groups	Group user is assigned to, multiple selections is allowed.
Password	User Password
User cannot change password	Select this to prohibit users from changing their password.
Password never expires	User password has no expiry date
Account is Disabled	Check this to lock the account and prevent the user from logging in.
Change Password Next Login	This prompts and enforces users to change their password at next login.
Crew Name	Linked user ID to a Crew profile.
Buyer Limit	The maximum amount user is allowed to spend on good purchases in the MMS module.
Cashbook Assigned	Cashbook account the user is assigned to.
Operational Position	Operational Position user is assigned to.
Vendor	Used by web services (iCrew) to retrieve the excursion.
Email address	Email address of the user.

1. Select a **Security Group** from the Security Groups list.
2. Click **Add User**.
3. In the Add User window, enter the relevant information in each of the section.
4. Click **Apply**.
5. The newly added user is shown in the selected Security Group. To view the user account, expand the tree view.

Removing a User

1. Select the **user** from the Security Group and click **Remove User**.
2. At the Remove User prompt, reconfirm the user name and ID and then click **Yes** to proceed or **No** to return to the previous menu.

> **Note**
>
> The system shall prompt an error if the user has performed transactions in the system and will prevent you from removing the user.

Copying User Security Right

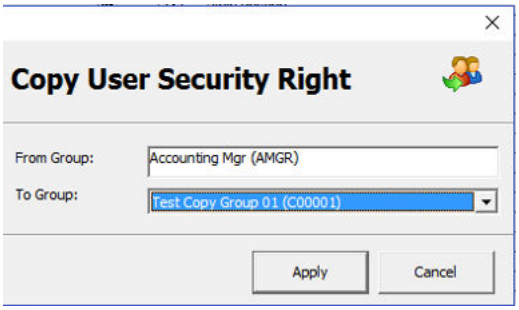
The Copy Security Right allows you to copy a group user access rights to another.

1. Select a Security Group from the Security Groups list.

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2. Click **Copy Security Right** from the menu bar.
3. In the Copy User Security Right window, the selected group is defined in **From Group** column. Select the **To Group** from the drop-down list.

Figure 11-15 Copy User Security Right

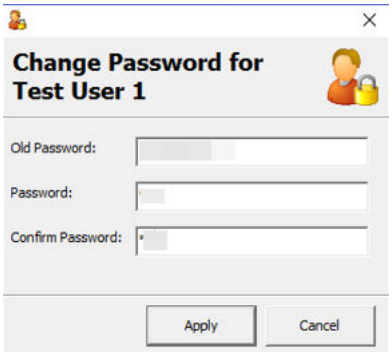


4. Click **Apply** to proceed. The access rights you copied from are added to the group.

Changing Password

1. Select a **user** from the Security Group list.
2. Click **Change Password** from the menu bar.
3. In the Change Password for [User Name] window, enter the **new password** and confirm the password.

Figure 11-16 Password Change Window



4. Click **Apply** to proceed. A message box prompts “Password has been changed” when the password is applied successfully.
5. Click **OK** to close the message box.

Searching for Access Rights

The User Security function has a built-in search function that allow you to search for a security groups or user rights. See Figure 11-11

1. In the **System Rights** tab of the List of Security Access section, select the **access group** to filter from the drop-down list.
2. Tab to the next field and insert the keyword to filter, for example, Posting.

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3. Click **Filter** to display the access rights that contain the keyword.
4. The return results are exportable to Microsoft Excel. To export, click the **Export to Excel** to export the Security Access Rights.

Forgot Password

The Forgot Password is a password reset feature. This feature is only available in Launch Panel Login screen.

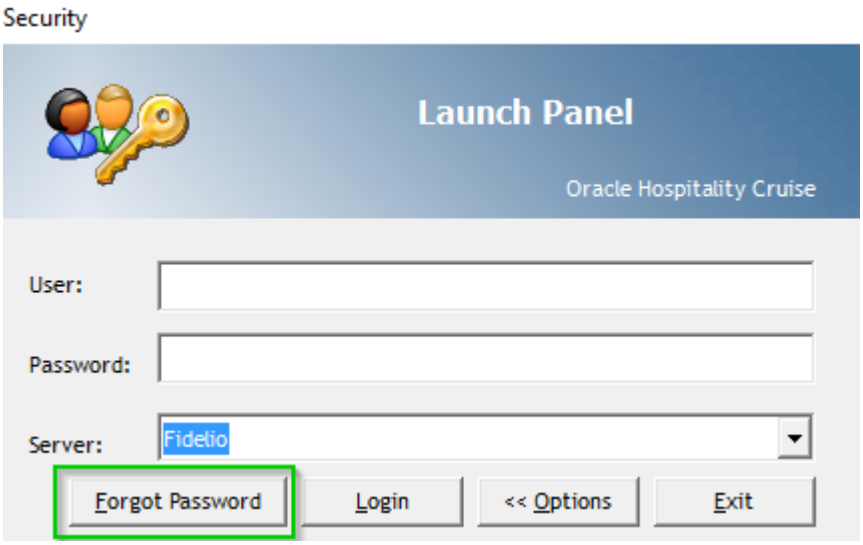
Setting up Password Reset

1. Log in to Administration module.
2. Select **Database Parameter**, **Promo group** and define the SMTP settings in the following parameters:
   - SMTP Server IP Address
   - SMTP Server IP Port
   - Sender Name
   - Sender Email Address
   - SMTP Require SSL. Depends on organization requirement
   - SMTP Server Require Login Authentication. If parameter enabled, define the following:
     - SMTP User Name
     - SMTP User Password
3. In the Launch Panel, select **User Security**. Define the Email address for the login user. See Figure 11-14.

Password Reset Feature

1. At the Launch Panel application window, click the **Options** button.

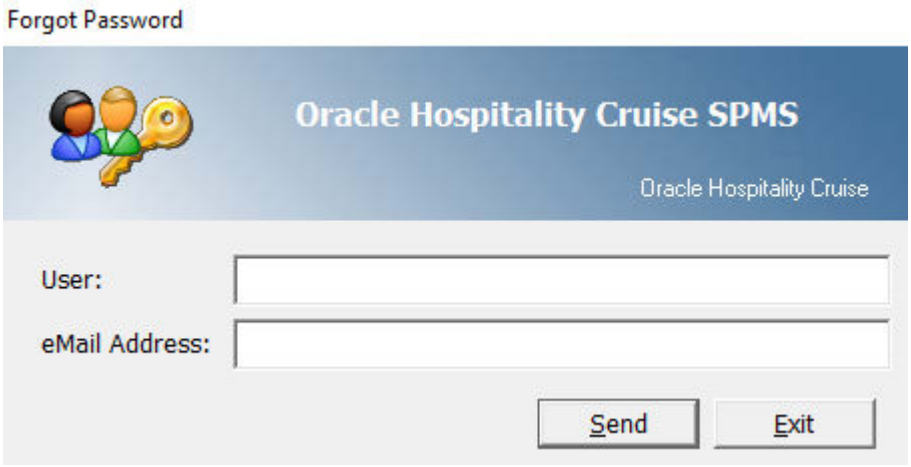
Figure 11-17 Launch Panel Forgot Password



2. Click the **Forgot Password** button. You must enter the user **login ID** and **email address** that matches the email defined in user login account.

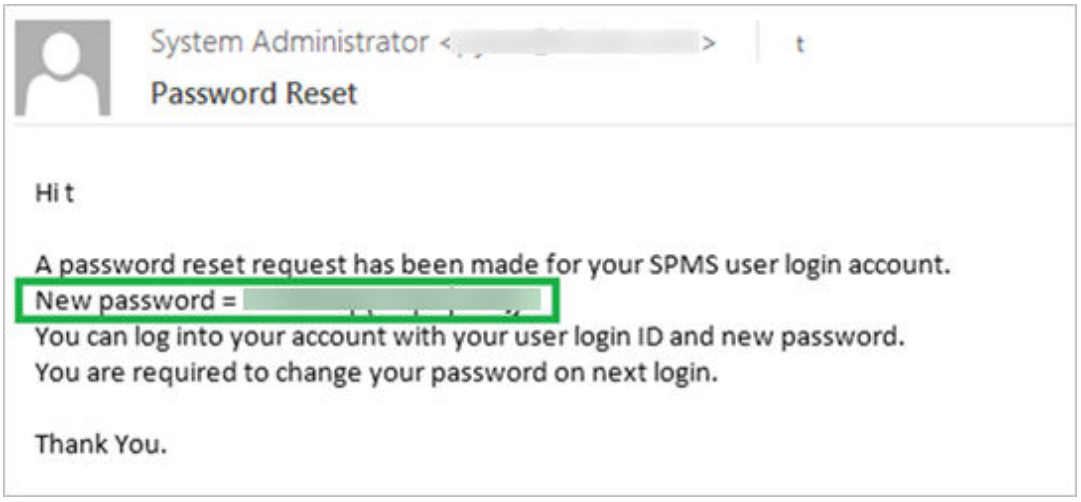
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Figure 11-18 Forgot Password Account Credential



3. Click the **Send** button. The system will prompt an “Invalid Email Address” message if the email address does not match. If the email matches, you will receive a temporary password and a notification message “An email with instruction how to reset your password has been sent EMAIL ADD” shall prompt.
4. The old password is no longer valid once a request for a password reset is triggered. Enter the temporary password at the Login window and click **Login**.

Figure 11-19 Sample Password Reset Notification Template



5. The system prompts you to change the password. Click **OK** and proceed to change the password.

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12
Housekeeping

The Housekeeping module enables comprehensive management of daily cleaning and maintenance for passenger's staterooms, and public areas aboard the ship. In addition to overseeing cleaning tasks, it provides scheduling for future preventative maintenance.

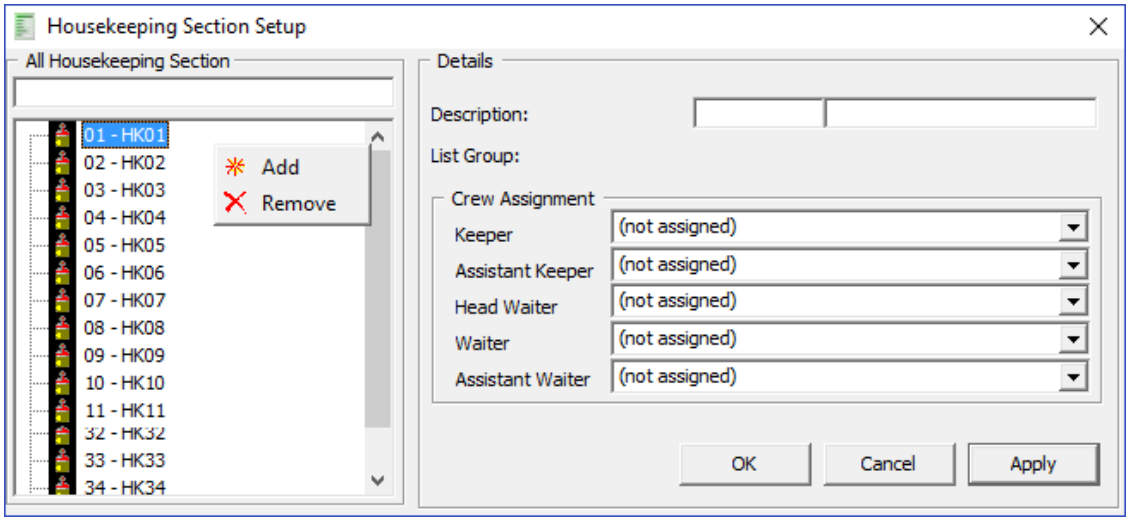
System Configuration

The Housekeeping module has two (2) handling modes, Generic (Non-Ferry Operation) and a Ferry Operation. The setup varies between modes and is controlled by the **Ferry, Enable Ferry Operation** parameter group. The following Configuration is a generic setup.

Housekeeping Section Setup

The cabins of the ship are set up during the initial configuration. See **Stateroom Setup** in Administration User Guide for more information on how to set up a cabin. In view of the ship's capacity, a Housekeeping Section is used to identify the cabin and public location.

Figure 12-1 Housekeeping Section Setup

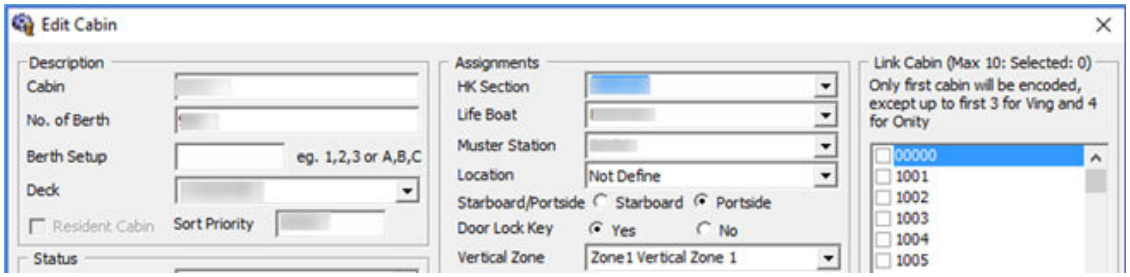


1. Log in to the **Administration module** and select **Administration, Stateroom Setup, Stateroom**.
2. In the Cabin Setup window, click the **Edit** button next to Sections.
3. In the Housekeeping Section Setup window, right-click the blank space and, select **Add New**.
4. Enter a **Code** and **Description** in the fields provided.
5. Select the **Keeper, Assistant Keeper, Head Waiter, Waiter,** and **Assistant Waiter** from the drop-down list.

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6. Click **Apply** to save the Housekeeping Section.

Figure 12-2 Assigning Housekeeping Section to Cabin

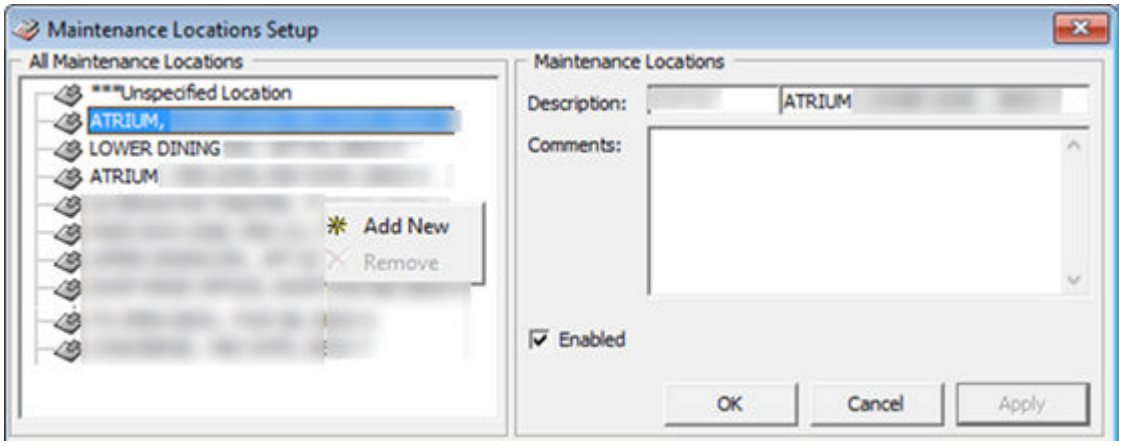


1. Select a cabin from the Cabin Setup form and then click **Edit**.
2. In the Assignments section, select the **HK Section** from the drop-down list, and then click **OK** to save.
3. To delete the housekeeping section, right-click and select **Remove**.

Public Location Setup

The Public Location is designed to help the Housekeeping and Maintenance staff identify the location of tasks assigned to them.

Figure 12-3 Public Locations Setup



1. From the Administration Setup menu, select **Maintenance Setup**, and then select **Locations**.
2. Right-click and select **Add New**.
3. Enter a **short code, description** and additional comment(s).
4. The newly added public location is enabled by default. To disable the item, de-select the checkbox under **Enabled**.
5. Click **Apply** to save the Public Location.

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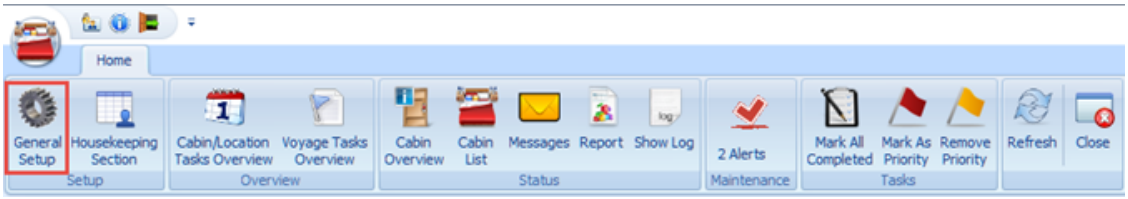
6. To remove, right-click the code and select **Remove**.

Setup

General Setup

The Setup section for the Housekeeping module is comprised of General Setup, Housekeeping Section, Overview by Cabin, Location and Voyage, Status and Maintenance Alerts. Within the General Setup, there are configurations for Housekeeping Status, Task Type, Cleaning Task and Grouping of Tasks.

Figure 12-4 General Setup

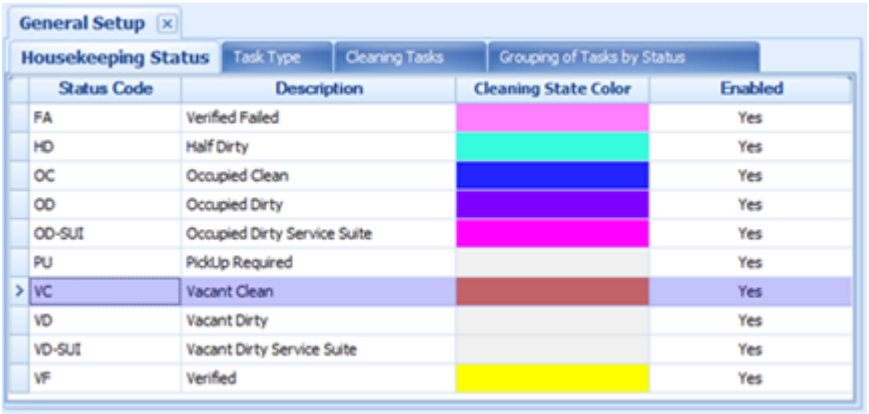


Housekeeping Status

The Housekeeping Status is an indicator of the cabin clean status. Below are the default housekeeping statuses. You can add an additional status depending on the operational requirement using the following steps.

- **VD:** Vacant Dirty
- **VC:** Vacant Clean
- **OD:** Occupied Dirty
- **OC:** Occupied Clean

Figure 12-5 Housekeeping Status Setup



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Adding Housekeeping Status

1. In the Home tab, select **General Setup** and then select the **Housekeeping Status tab**.
2. Select **Add** from the ribbon bar.
3. In the New Housekeeping Status window, enter the **code**, comment, and select a color that represents the status from the color palette.
4. The newly added code is enabled by default. Deselect the checkbox to disable the code.
5. Click **Save** to save the status.

Editing Housekeeping Status

To change the status description or color, either double-click the record or click **Edit** on the ribbon bar to open the Edit Housekeeping Status window.

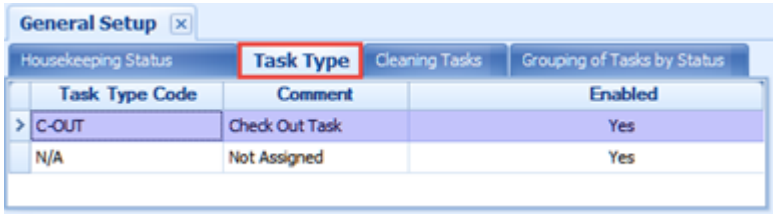
Disabling Housekeeping Status

To disable a status that you no longer need, select the status and click **Delete**. Deleting a default status is not allowed. This process only disables the status and does not remove it from the Housekeeping status grid.

Task Type

The Task Type is a cleaning task assignment, where the task type code is shown in the Cabin Task Overview task box.

Figure 12-6 Task Type Setup

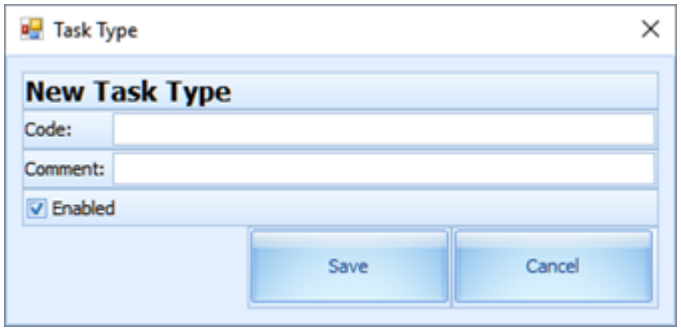


Adding Housekeeping Task Type

1. From the General Setup window, navigate to the **Task Type** tab.
2. Click **Add**.

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Figure 12-7 Add Housekeeping Task Type



3. Enter a **Code** in the code field and the **description or additional comment** in the Comment field.
4. The newly added task type is enabled default. Deselect the **Enabled** checkbox to disable the task.
5. Click **Save** to save the housekeeping task type.

Editing Housekeeping Task Type

To change the Task Type, double-click the **record** or click the **Edit** on the ribbon bar.

Disabling Housekeeping Task Type

To disable the Task Type, select the **record** and click **Delete**.

> **Note**
>
> Task types “C-OUT and “N/A” are default task types that you cannot disable. The system prompts a warning message, “This is a default code and cannot be deleted.”

TIP: Task type “C-OUT” normally ties to a checked out cabin (VD status) and indicates that the cabin needs a linen change. Task type “N/A” indicates there is a need for a linen change for a cabin (OD status) and is not labeled as C-OUT in the cabin task box.

Cleaning Tasks

The Cleaning Tasks is a task code used by management to manage the assignment of duties and chores to the housekeeper.

Figure 12-8 Cleaning Tasks Setup

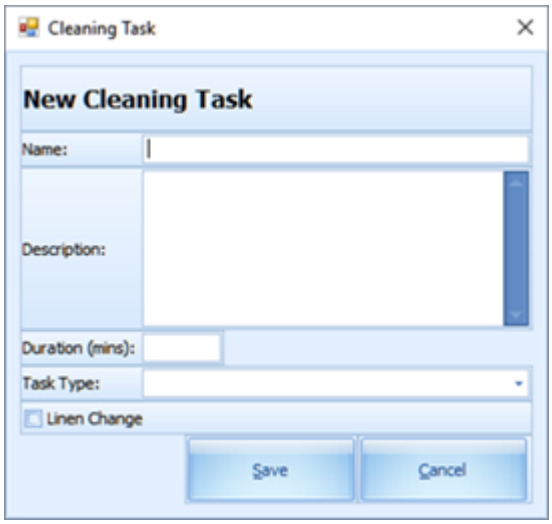


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Adding Housekeeping Cleaning Tasks

1. In **General Setup**, navigate to the **Cleaning Task** tab.
2. Click the **Add** button on the ribbon bar to open a New Cleaning Task window.

Figure 12-9 Add Housekeeping Cleaning Task



3. Enter a **task name**, a **description** of the task, and **duration** involved.
4. Click the **Task Type** drop-down menu to select a cleaning task:
   - Task type C-OUT for Checked Out Cabin. This is used when the cabin requires a linen change on a specified day. The C-OUT status is indicated in the cabin bubble on day of checked out.
   - Task type N/A for CO-Linen Change. This is used when the cabin requires a linen change on a specific date. The C-OUT status is not indicated in the cabin bubble and such service is usually for cabins that are still occupied by the guest.
5. Select the **Linen Change** to generate a task for a linen change.
6. Click **Save** to save.

Editing Housekeeping Cleaning Tasks

To change the cleaning task, either double-click the **record** or click **Edit** on the ribbon bar.

Deleting Housekeeping Cleaning Tasks

To remove the cleaning task, select the **record**, click **Delete**, and then click **Yes** on the dialog box.

Grouping of Tasks by Status

This feature enables you to group specific tasks by status. The grouped tasks appear in each of the cabin windows in the Cabin Task Overview.

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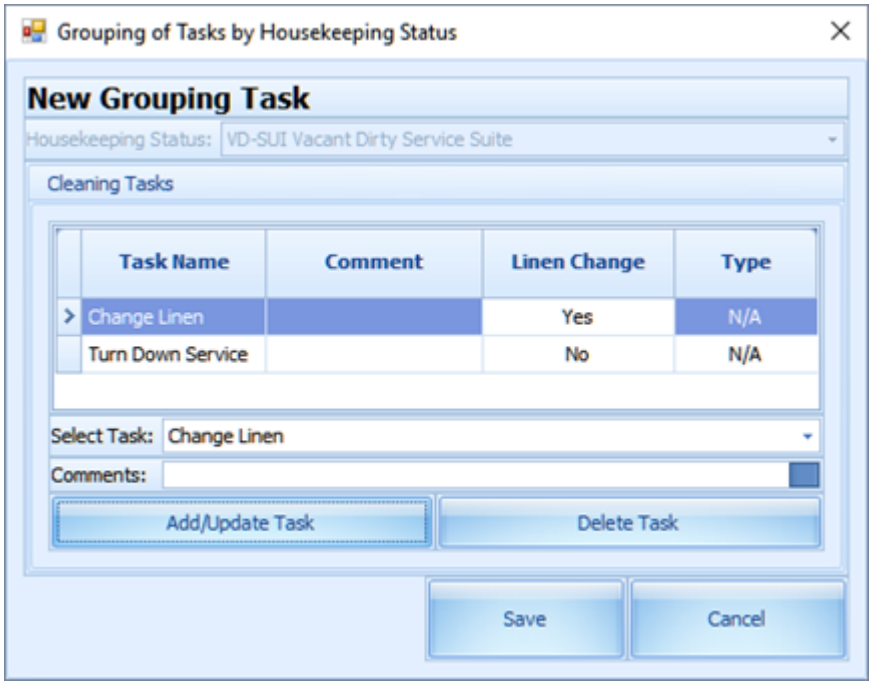
Figure 12-10 Grouping of Tasks by Status Setup



Adding Grouping of Tasks by Status

1. In **General Setup**, click the **Grouping of Tasks by Status** tab.
2. Click **Add** on the ribbon bar.

Figure 12-11 Add Housekeeping Grouping of Tasks by Status



3. In the Grouping of Task by Housekeeping Status window, select the following:
   a. A cleaning status from the **Housekeeping Status** drop-down list.
   b. A cleaning task from the **Select Task** drop-down list and enter a comment in the **Comments** field.
4. Click the **Add/Update Task** to insert the cleaning task into the grid.
5. Repeat step 3 to add more cleaning tasks

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6. Click **Save** to save the grouping of tasks by status.

Editing Grouping of Tasks by Status

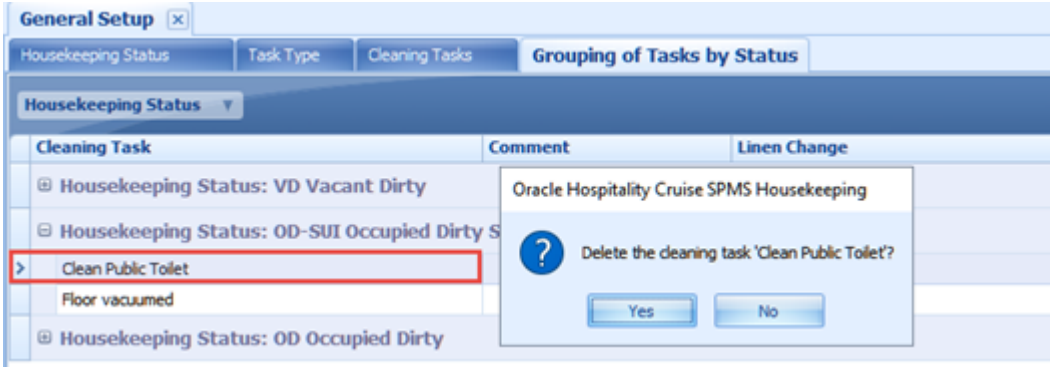
To update the task in one of the groups, double-click the task, update the information and then click **Save**. You can also click **Edit** on the ribbon bar.

Deleting Grouping of Tasks by Status

Before you are allowed to delete the task group entirely, you must first remove the cleaning task individually.

1. Select the cleaning task.
2. Click **Delete**.
3. Click **Yes** at the delete dialog prompt.

Figure 12-12 Delete Cleaning Task for a Cleaning Status



Housekeeping Section Setup

The Housekeeping Section Setup enables you to group a number of cabins or public locations into a Housekeeping section. There are two sections to set up: Cabin and Public Location. The steps to set up the Housekeeping section for both types are identical.

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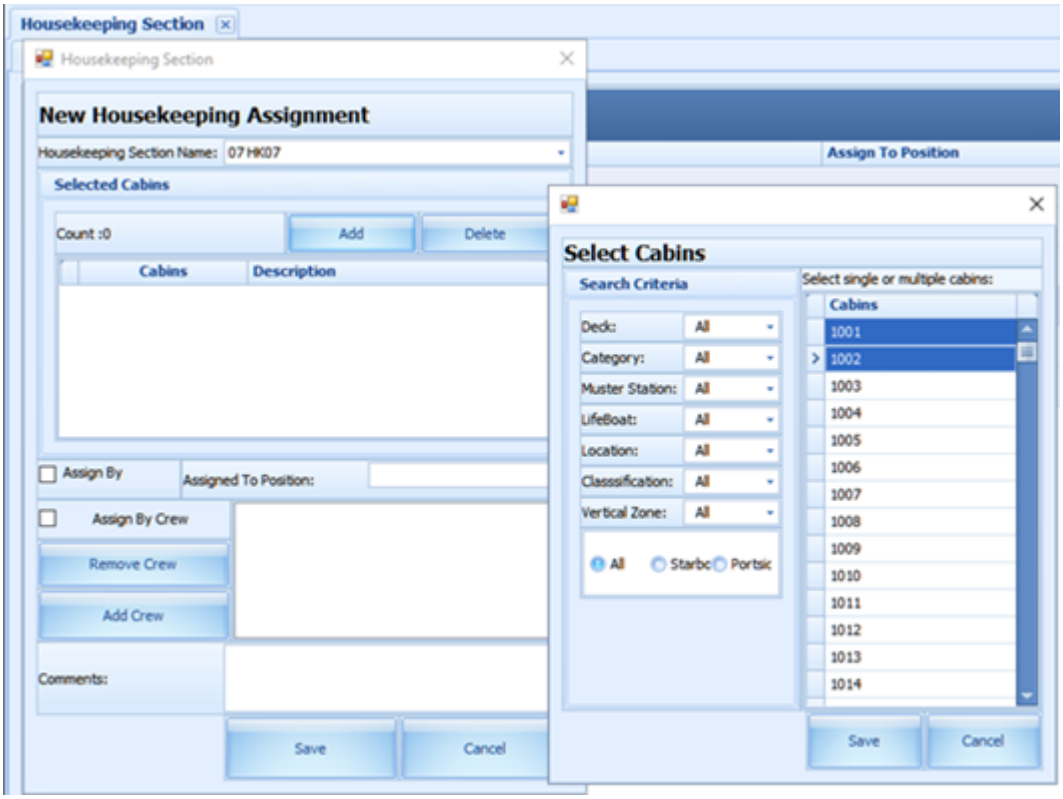
Figure 12-13 Housekeeping Section Setup



Setting up Location

1. From the **Home** tab, click **Housekeeping Section Setup** and navigate to the **Cabin** tab.
2. On the menu ribbon bar, select **Add**. This opens a New Housekeeping Assignment window.

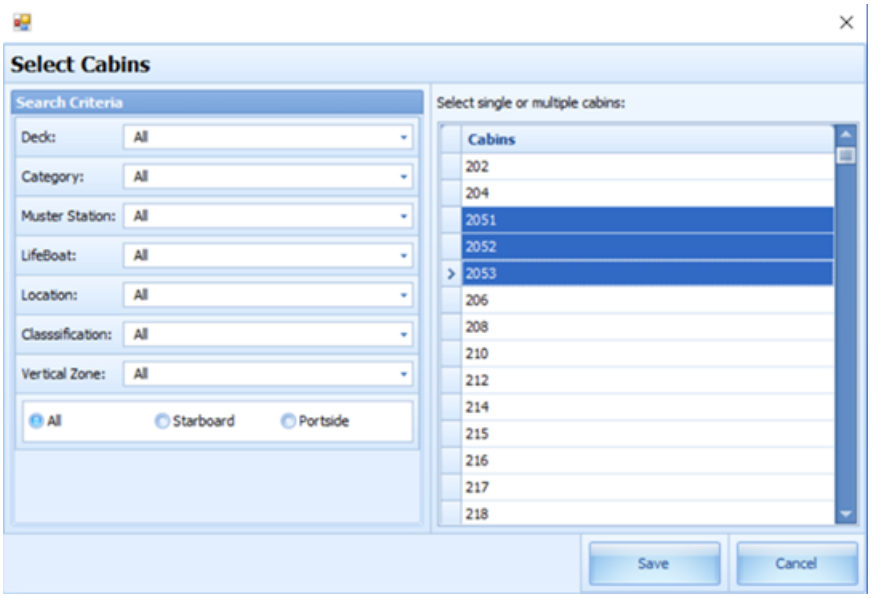
Figure 12-14 Housekeeping Section by Cabin Setup



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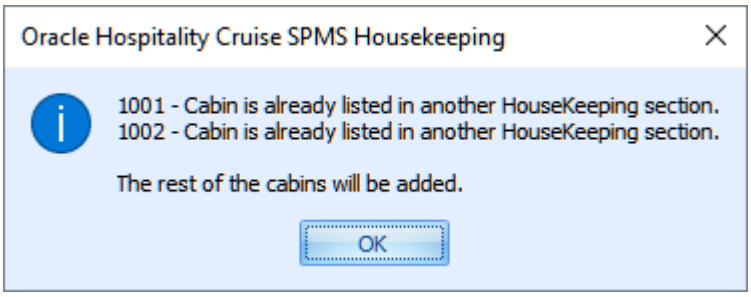
3. At the **Housekeeping Section Name**, select a section from the drop-down list and click **Tab** to continue.
4. Click **Add** and select the cabin from the **Select Cabins** window using the **Search Criteria** feature to filter your search.

Figure 12-15 Add Cabin to the Housekeeping Section



5. Select the **cabin number** and then click **Save**. Multiple selections are allowed.
6. If the selected cabin is assigned to another section, an alert message appears, indicating the cabin will not be added. Click **OK** to add the non-conflicting cabins.

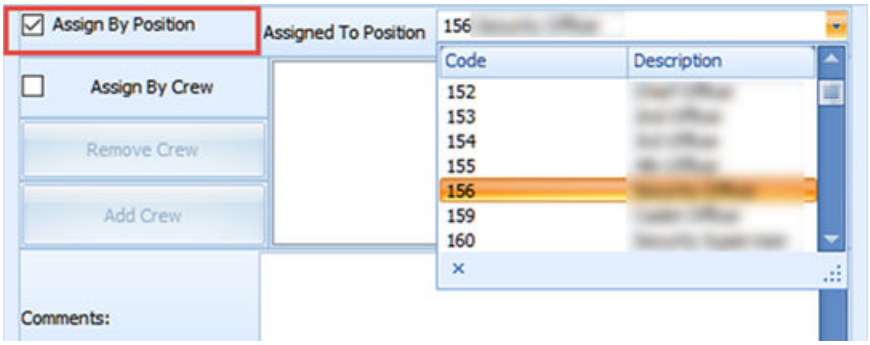
Figure 12-16 Alert Message of Add Cabin to the Housekeeping Section



7. You can assign the selected section by crew position or individual crew member.
   - To assign by crew position, check the **Assign By Position** checkbox and select the **position** from the Assigned To Position drop-down list.

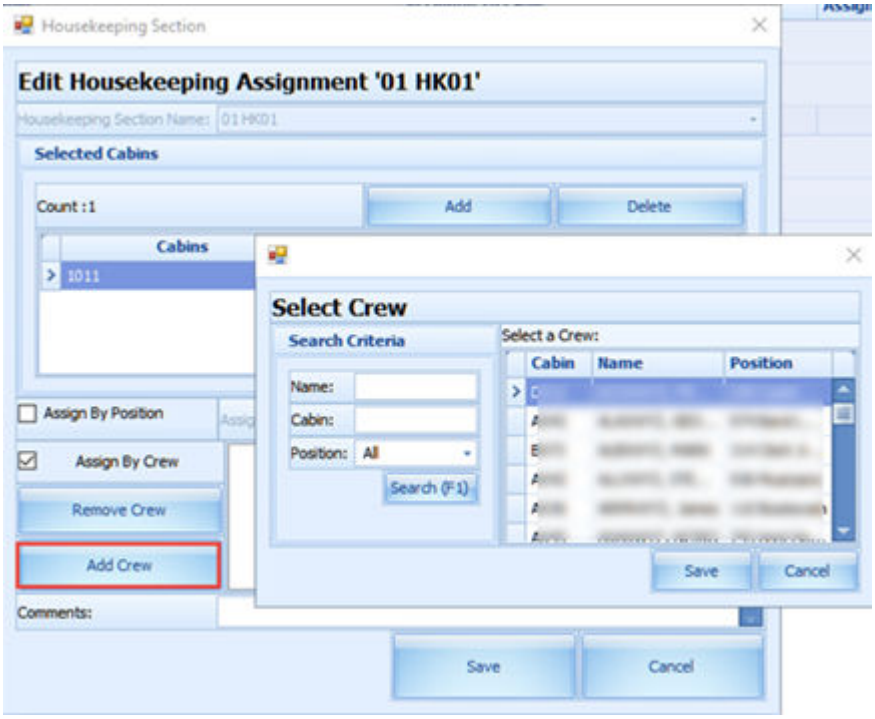
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Figure 12-17 Assign by Position



- To assign by crewmember, select the **Assign By Crew** checkbox and click **Add Crew**. You can use the Search Criteria to search for a crew member. Select **Single or multiple crews** from the grid and click **Save** to continue.

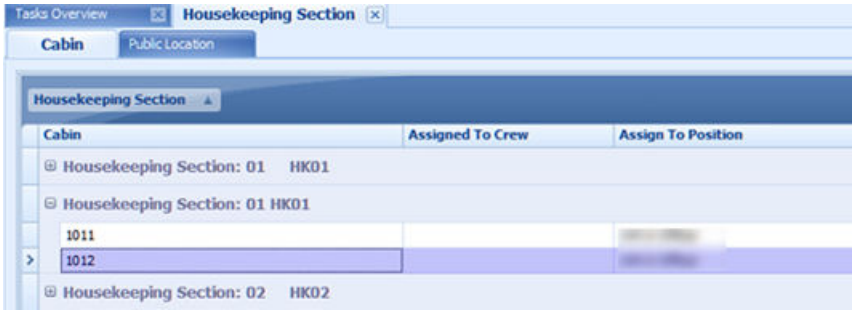
Figure 12-18 Assign by Crew



8. The selected crew is added to the **Assign By Crew** field.
9. Enter **comments** in the Comments textbox and click **Save** to save the Housekeeping Section assignment.
10. To remove a crew from the crew list, select the **crew name** and click **Remove Crew**.
11. In the Cabin tab, the Assigned To Crew column lists all the crew assigned in the section, while the Assign To Position column lists all the crew positions belonging to the section.

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Figure 12-19 Housekeeping Section for Cabin Overview

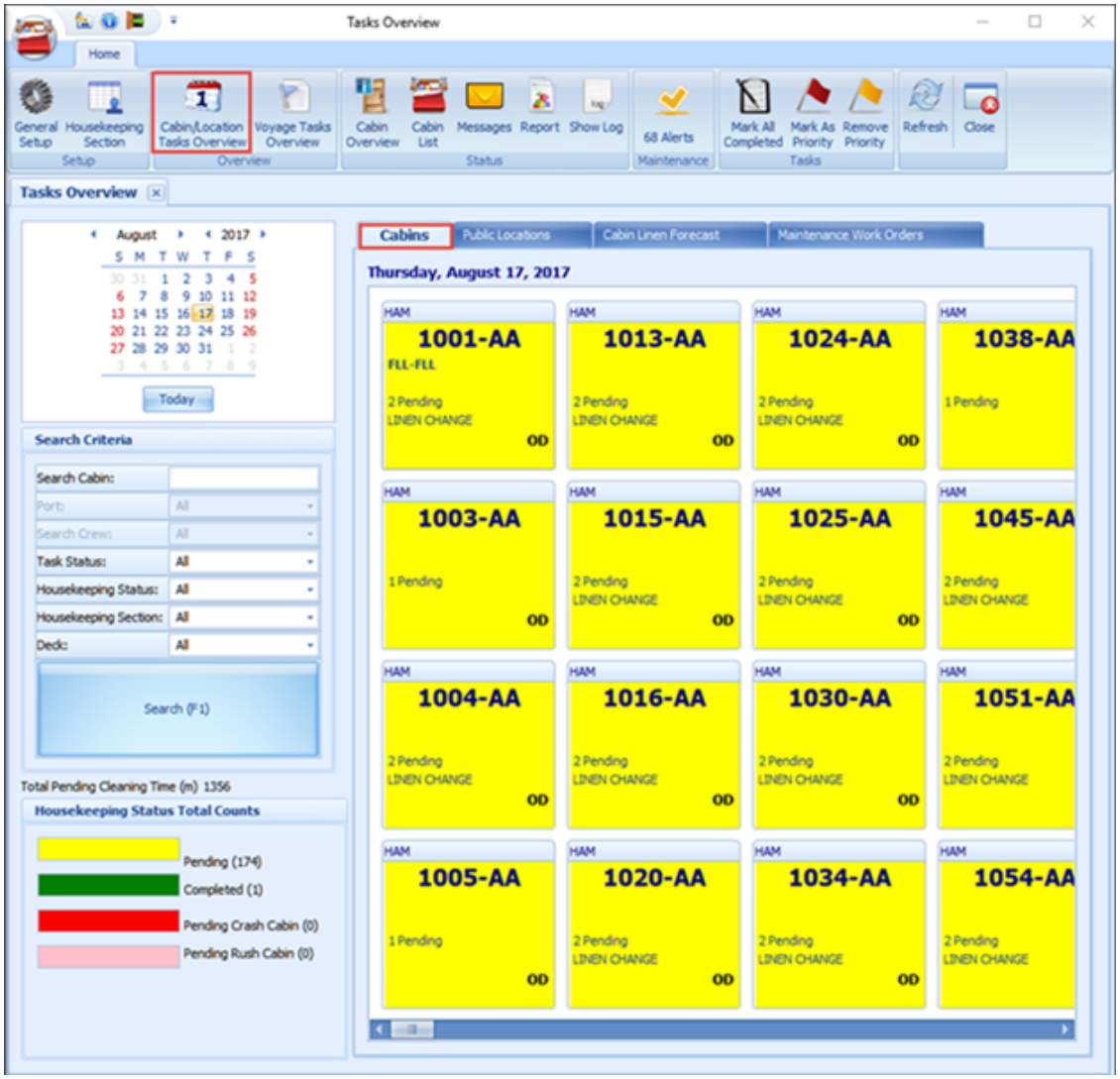


Tasks Overview

The Cabin/Location Task Overview not only provides a view of the overall cabin status, it also allows you to update the cabin clean status and the task status. It comprises the following tabs: Cabins, Public Locations, Cabin Linen Forecast and Maintenance Work Orders, with the Cabins tab being the main tab. In this window, you can search for a cabin by task status, housekeeping status, housekeeping section, deck and the total counts.

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Figure 12-20 Cabin Tasks Overview



Above the Housekeeping Status Total Counts section, the Total Pending Cleaning Time (m) sums up all the pending task durations based on the search criteria and time shown in minutes.

In the Cabins tab, the cabins are shown in the grid layout with their status and number of pending tasks. See the following table for an explanation of the fields.

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Figure 12-21 Pending Cabin Task



Table 12-1 Pending Cabin Task Labels Definition

Label	Definition
Yellow	Cabin with pending task.
Red	Crash Cabin
Pink	Rush Cabin
Green	Cabin with completed task.
HKG	Indicates the port code where the tasks is generated, based on the arrival port setup in Cruise Setup.
04502-CD2	Indicates the cabin number followed by the cabin category code.
NEXT EMB: MYPEN-SGSIN	Indicates the next embarkation port and disembarkation port for the expected checked-in guest
2 Pending	Indicates the number of pending task for the cabin.
LINEN CHANGE	Indicates the cabin requires a linen change
VD	Indicates the cabin housekeeping status: **VD** for Vacant Dirty and **OD** for Occupied Dirty.
C-OUT	Indicates the passenger has checked-out from the cabin.

The system generates the cabin/location and pending tasks during the system date change or when the passenger checks out from the cabin. The topics below describe the change triggers.

System Date Change

- Tasks created behind the scenes during system date change.
- The system look for occupied cabins with OD status and creates the tasks (first port of the new day) for these cabins, based on the value set in the parameter X day to Change Linen and X day Before Check-Out To Skip Linen Change.

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- Cabins that are in VD status and have pending tasks are carried over to the new system date (first port of the new date) until they are cleaned.
- The system checks for cabins that are expected to check out on the new system date. It creates the checkout tasks for the cabin on the checkout port.
- Statistics count for Guests, Visitor, Crew, Child Count, and Special Needs Count will display at the Voyage Tasks Overview.

Movement in Cabin

The tasks are created when there is a check in, check out or cabin change. This only works when the **Ferry, Enable Ferry Operation** parameter is set to **enabled**.

- Upon guest check-in, the cabin status changes from VC to OD
- Upon check-out and when the **Bypass Change of Cabin Clean State Upon Check-Out** parameter is enabled, the status changes from:
  - OC, VC => VC
  - OD, VD => VD
- With the **Bypass Change of Cabin Clean State Upon Check-Out** parameter disabled, the status changes from:
  - OC,OD,VC,VD =>VD

In the event of a cabin change, the system considers the cabin on the day before as checked out and the new cabin as checked in. In such circumstances, the system changes the earlier cabin status to VD and creates the corresponding tasks under VD status. The new cabin status then changes from VC to OC and the task under OC status is created.

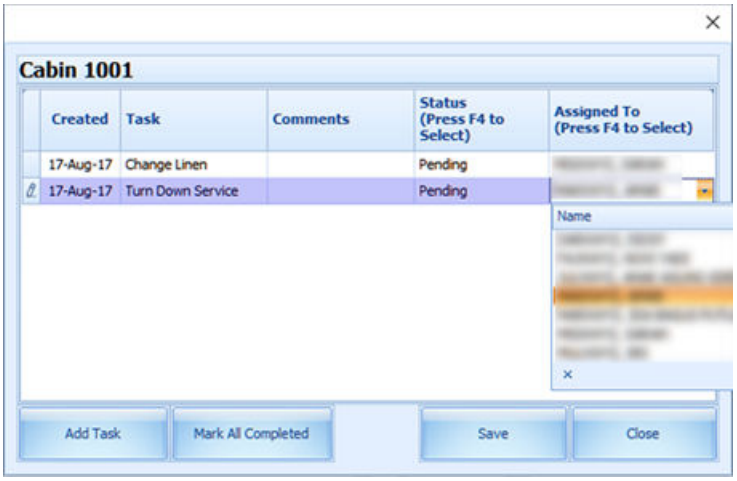
Cabin Task Overview

Apart from the system-generated task, additional tasks can be added to the cabin from the Cabins Overview window using the following steps:

1. At the Home tab, click **Cabin/Location Tasks Overview**.
2. Double-click the cabin box to open the cabin detail window. You can insert a comment, edit the status or assign the task to a housekeeper using an inline edit feature by highlighting the task and selecting it from the drop-down list.

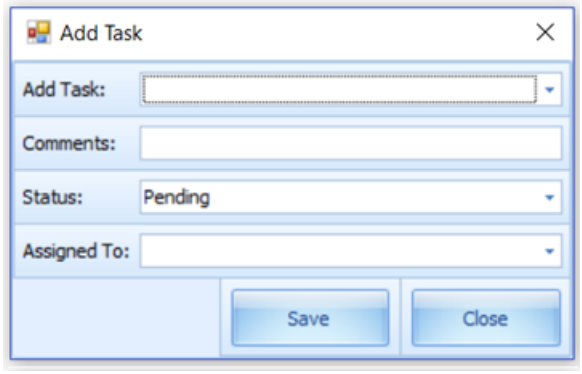
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Figure 12-22 Cabin's Task Details



3. Click **Add Task**, fill in the **Add Task** form, and click **Save**.

Figure 12-23 Add Cabin Task



4. If the housekeeping staff member has finished all assigned tasks for a cabin, instead of updating the task individually, the staff member can click the **Mark All Completed** to set all tasks as complete.

> **Note**
>
> If the logged in user is not associated to a crew ID or linked to User Security rights and attempts to mark the task as complete, the system returns a warning message Task updates have failed, please check the log activity entries for error.

5. Once all the pending tasks for the cabin are marked as complete, the selected cabin color changes from **Yellow** to **Green**, and all the task status flags show **Completed**.

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Figure 12-24 Completed Cabin Task



6. The system also allows you to mark all task as complete by selecting the **cabin** and then clicking the **Mark All Completed option** on the ribbon bar.

Crash Cabin Tasks

The Crash cabin task is populated when the cabin has both expected checkout and expected check-in guests at the same port. This is to alert the housekeeper that the cabin needs immediate attention as soon as the guest checks out.

Rush Cabin Tasks

Rush cabin is generated after meeting the following criteria:

1. When the cabin has a passenger checking out at a current port and another checking in at the next port on the same day.
2. Checkout on day 1 (6 hours) before midnight and check-in on day 2 (8 hours) after midnight. This is where both parameters **Overnight Rush Cabin Before Midnight Hours** and **Overnight Rush Cabin Extended Hours** are used.

Such cabins are indicated in **pink**, as an alert for the housekeeper to attend to this cabin immediately after the passenger checks out and before the next passenger checks in.

Priority Cabin Tasks

The Priority Cabins are the cabins that checked out early. The housekeeper prioritizes the cleaning to have them ready for the next check-in. Use the following steps to prioritize the cabin cleaning.

1. Select the **cabin** from the grid and click **Mark As Priority** on the ribbon bar.
2. The selected cabin's pending tasks are updated to priority cabin status, which changes the background color from Yellow to Pink.
3. To remove the priority status for the cabin, select the **priority cabin** and click **Remove Priority** on the ribbon bar. This resets the color to yellow.

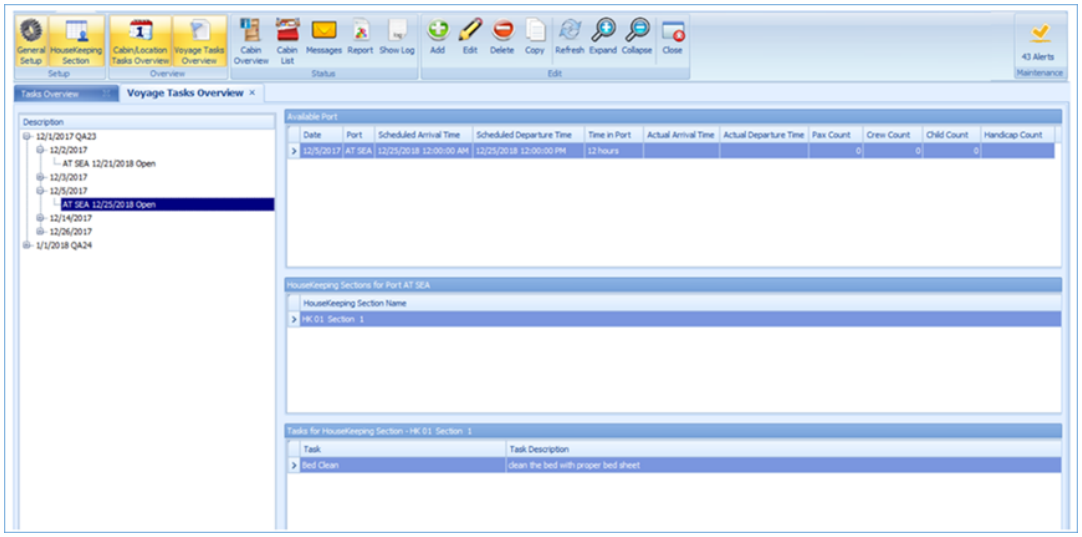
Public Location Task Overview

The Public Location Task Overview feature works the same as the Cabin Task Overview. Use the following steps to view the public location task created in the task overview:

1. In the Voyage Tasks Overview, select a **date** and click **Add** to add a task to a housekeeping section.

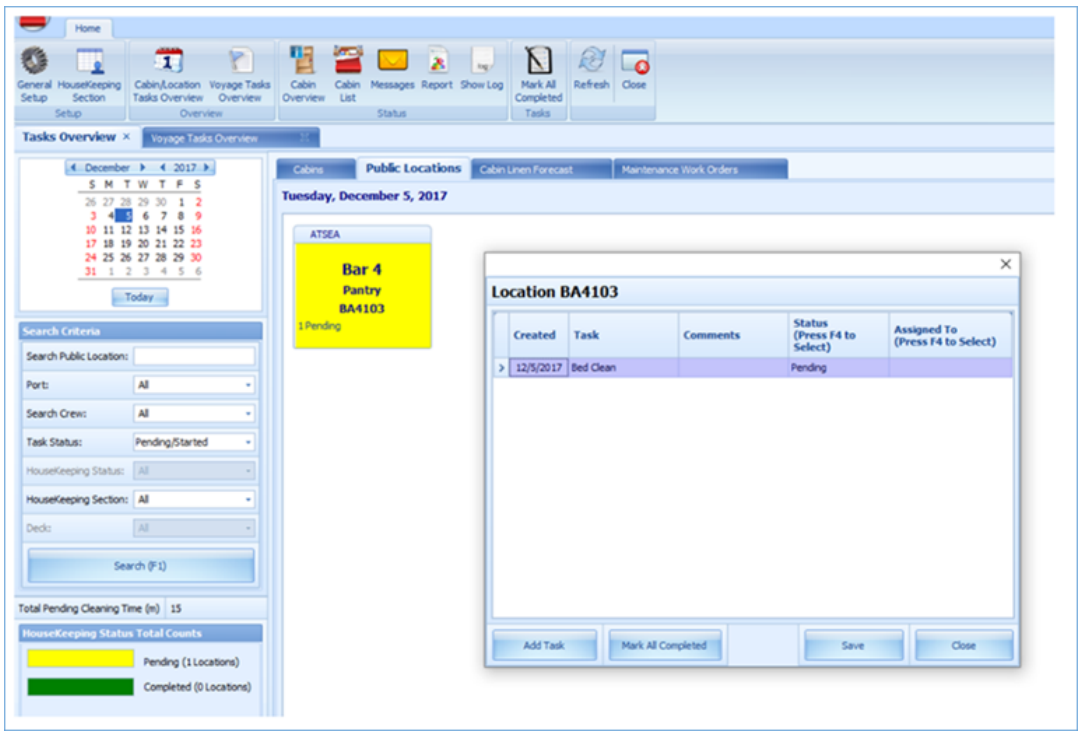
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Figure 12-25 Select the Date



2. Change the system date to the date of the task. The task will auto create in Public Locations.

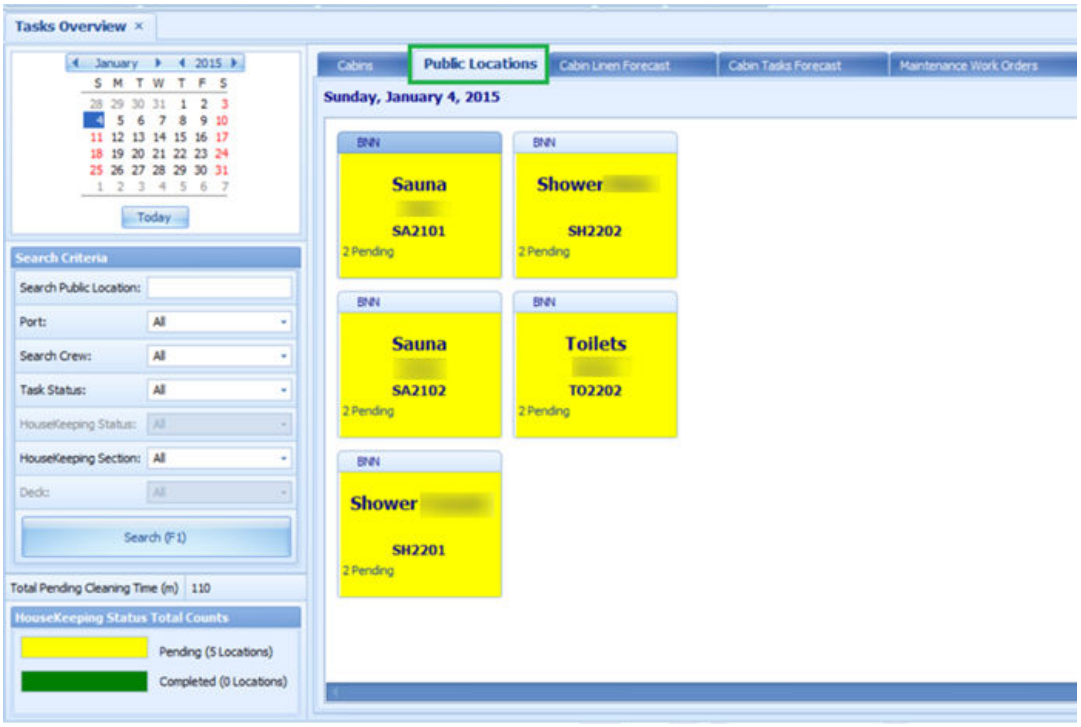
Figure 12-26 Location Created



3. At the Cabin/Location Tasks Overview, select the Public Locations tab.
4. To edit or change the task status, follow the steps detailed in the Cabin Task Overview.

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Figure 12-27 Location Task Overview



5. The following screen describes Pending Location task label:

Figure 12-28 Pending Location Task



Table 12-2 Pending Location Task Labels Definition

Label	Definition
BNN	Indicates the port code where the tasks are generated based on Voyage Task Overview Setup
Shower Female	Indicates the Public Location description where the tasks are supposed to be carried out by housekeeper
SH2201	Indicates the Public Location code
2 Pending	Indicates the number of pending tasks for the Public Location

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Cabin Linen Forecast

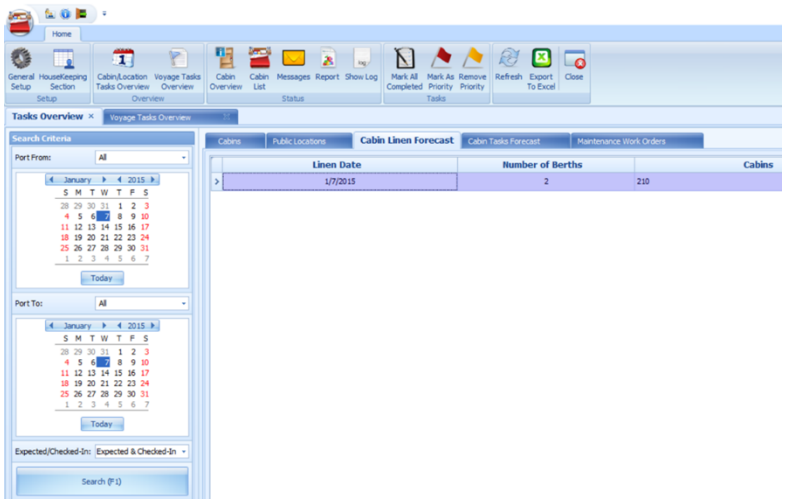
The Cabin Linen Forecast provides an overview of all cabins that are currently checked-in, expected to arrive or checked-out, that require a linen change.

During the System Date Change, the system generates a forecast based on the parameters defined in the database related to the Cabin Linen change. With this, the housekeeper can plan for the linen turnover.

For example, a guest in cabin 1234 checked-in on May 13 and is expected to checkout on May 20. During the system date change on May 16 being the 4th day after check-in and based on parameter “X day to Change Linen = 3 days”, this cabin will be listed in the Cabin Linen Forecast list.

1. From the **Cabin/Location Tasks Overview**, select the **Cabin Linen Forecast** tab. The cabins with linen change are listed in the **Cabin Linen Forecast** tab.

Figure 12-29 Cabin Linen Forecast



2. You can search the Cabin Linen Forecast by date range or the reservation status using the Search Criteria filter.

Table 12-3 Cabin Linen Forecast Labels Definition

Label	Definition
Linen Date	Indicates the date when the cabin is supposed to change linen
Number of Berths	Indicates the number of beds in the cabin
Cabins	Indicates the cabin required linen change

Cabin Tasks Forecast

The system can generate a Cabin Task Forecast based on the available port of the selected date.

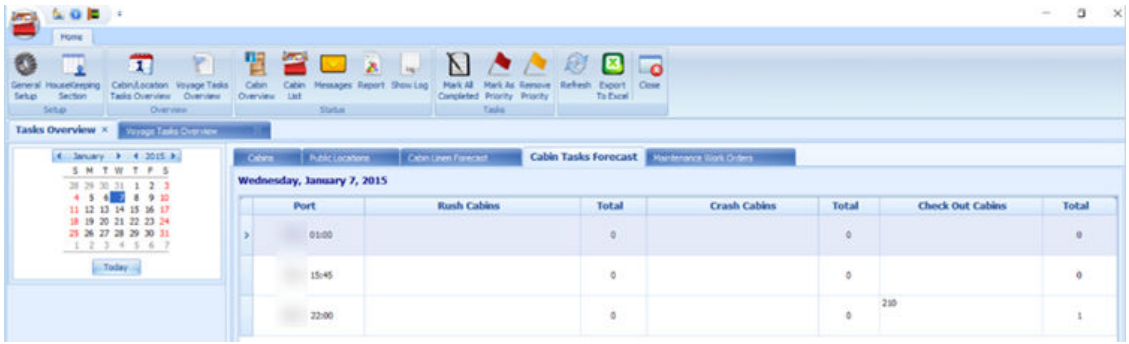
See System Parameters on how to set up the following parameters to work with the Cabin Linen Forecast.

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1. Minimum number of days onboard for Linen Change = 7 days
2. X day Before Check-Out To Skip Linen Change = 1 days
3. X day to Change Linen = 3 days

For example, the guest in cabin 04500 checked-in on May 13, and is expected to check out on May 20. When system date changed to May 16th, which is the 4th day (based on parameter X day to Change Linen = 3 days) after check-in, the system will show that cabin 04500 needs a linen change in the Cabin Linen Forecast list.

Figure 12-30 Cabin Tasks Forecast



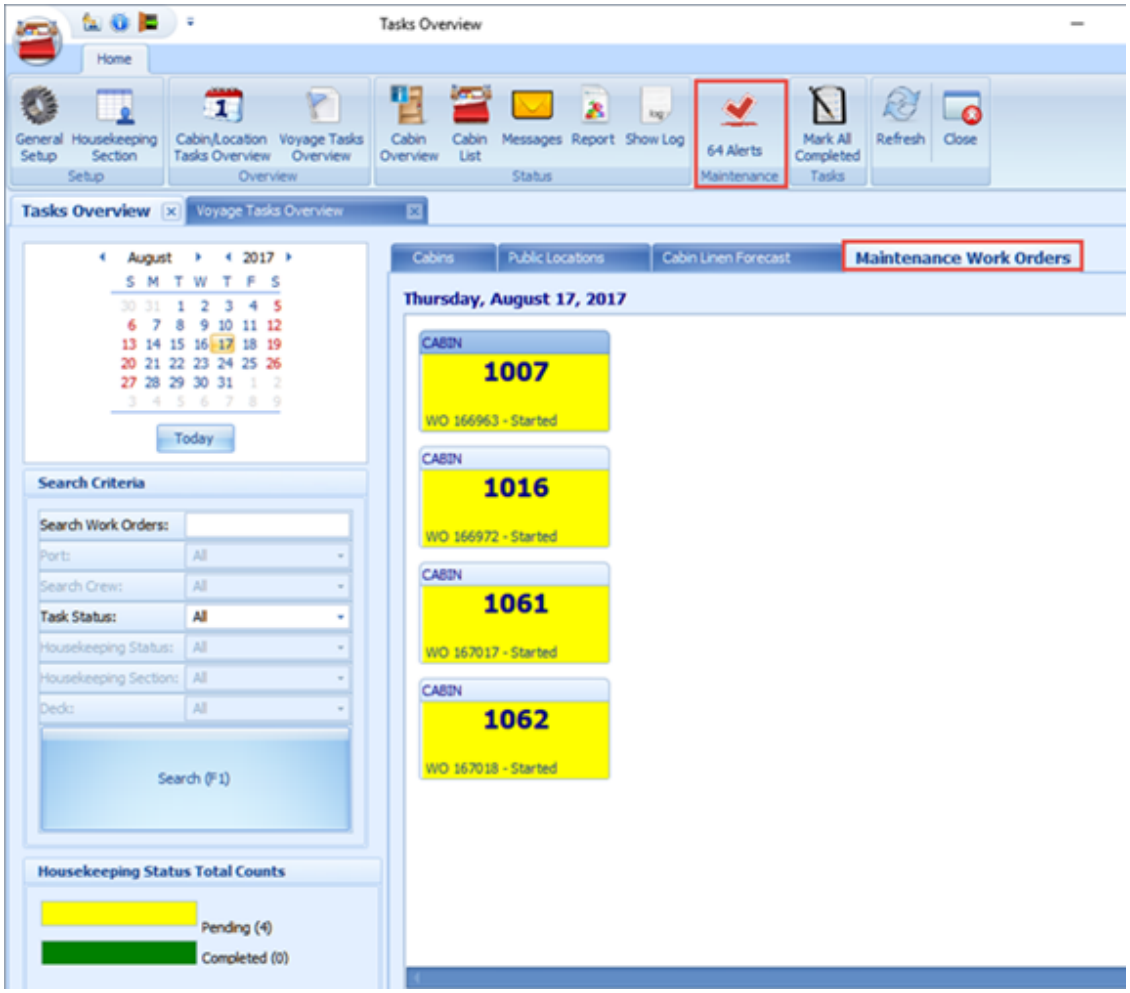
The screen above shows the cabin number and total number of Rush Cabins, Crash Cabins and Checked Out cabins by port respectively.

Maintenance Work Orders

The Maintenance Task created in the Maintenance module is linked and shown in the **Maintenance Works Orders** tab. This enables the housekeeper to monitor and follow up on the progress of the maintenance tasks.

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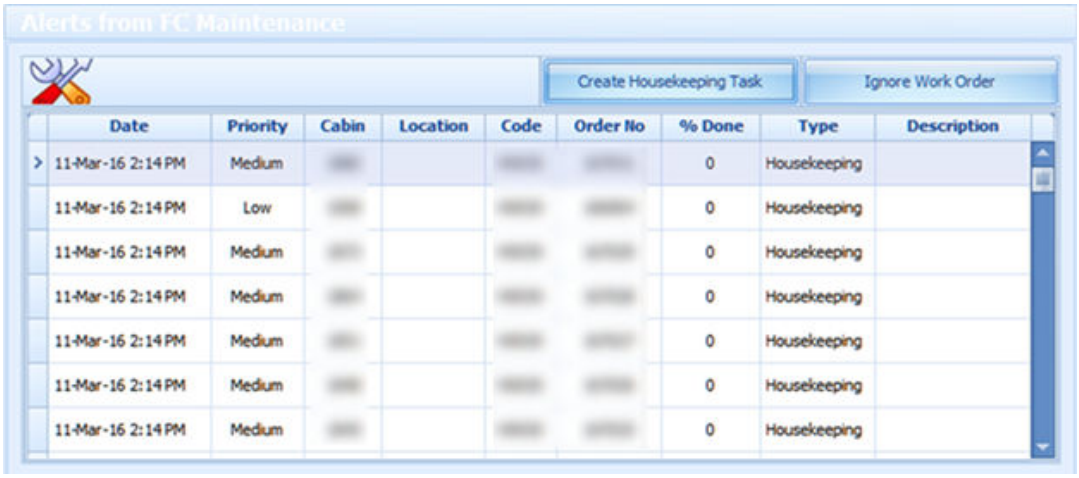
Figure 12-31 Maintenance Work Orders



- When creating a new task in the Maintenance module, you can opt to flag the **Inform Housekeeping** option in the Work Order Details window to send an alert to the housekeeper.
- The system checks for any maintenance tasks created every 15 minutes. Once it detects a task, it sets the **Alerts** icon on the ribbon bar to blink.
- Click the **Alert option** open the **Alerts from Maintenance** window.

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Figure 12-32 Alert from Maintenance Module

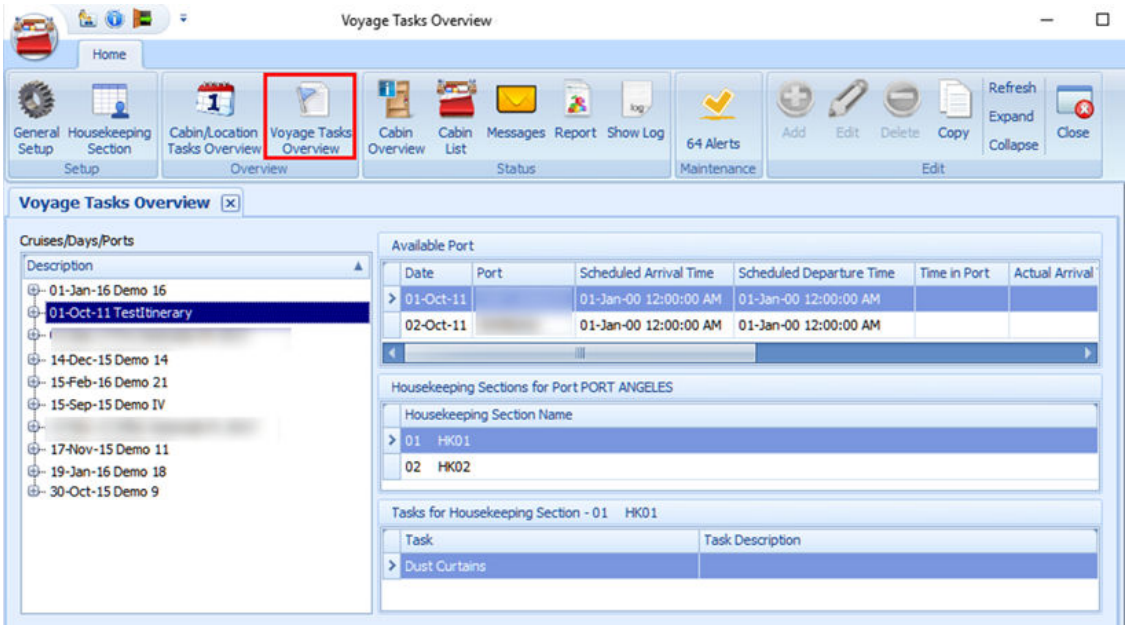


- Select a line item and click the **Create Housekeeping Task** to create a task in the Maintenance Work Orders tab. If you click the **Ignore Work Order**, it will ignore the work order and delete it from the **Alerts from Maintenance** window.
- To mark the work order task as complete, select a **work order** and click **Mark All Completed** on the ribbon bar. This changes the color to green.

Voyage Task Overview

The system generates the tasks for the public locations during a system date change.

Figure 12-33 Voyage Task Overview



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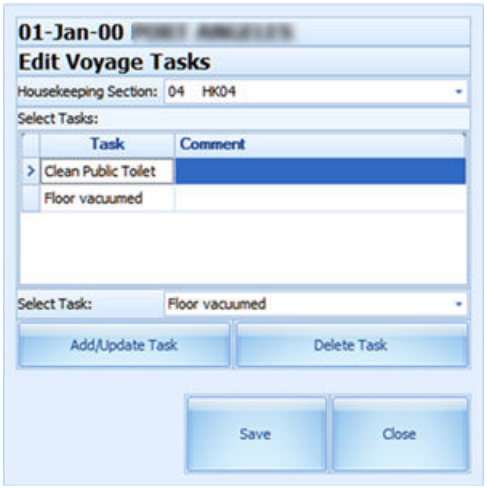
Table 12-4 Voyage Task Field Definition

Header	Definition
Cruise/Days/Ports	Tree view list of the voyage/cruise.
Available Port	The port details for a selected port day.
Housekeeping Section Name	The assigned housekeeping section for the selected port.
Task for Housekeeping Section	List the specific tasks assigned to the selected housekeeping section.

Adding New Location Tasks to Port

1. From the Home tab, click the **Voyage Tasks Overview**.
2. Select the **port** from the cruise day and click **Add** on the ribbon bar.
3. At the New Voyage Tasks window, select the **Housekeeping** section and task from the drop-down list.

Figure 12-34 New Voyage Tasks



4. Click **Add/Update Task** to add or click **Delete Task** to delete.
5. Click **Save** to save the record.
6. Repeat the above steps to add different tasks to another housekeeping section.
7. The tasks assigned to the section appear when you select the section name under the **Housekeeping Section**.

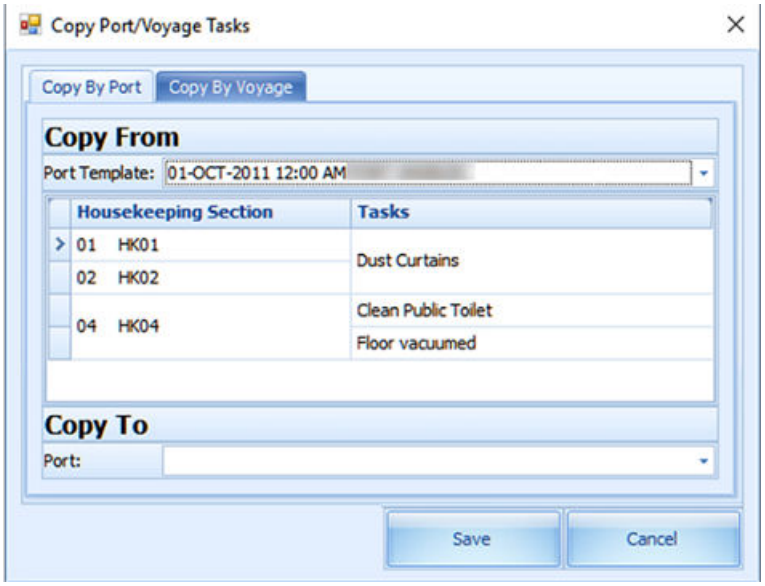
Copying a Task to another Port/Voyage

You can copy the same location task to a future cruise port as a recurring task.

1. Select the cruise from Cruises/Days/Port and click **Copy** on the ribbon bar.
2. At the **Copy Port/Voyage Tasks** window, select **Copy by Port**.
3. Select **Port Template** from the drop-down list. The task for the current port populates accordingly.

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Figure 12-35 Copy Port/Voyage Tasks



4. On **Copy To** select the **Port** to copy this information to and click **Save**.
5. To copy the task by Voyage, navigate to the **Copy by Voyage** tab.
6. Select the **Voyage Template** to copy from and then select the **Voyage**.
7. Click **Save** to complete the process.

Cabin Overview

The Cabin Overview list provides a detailed overview of the cabin, including the occupancy and status of the cabin. The information shown changes depending on the filter entered in the Search Criteria.

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Figure 12-36 Cabin Overview Show by Voyage

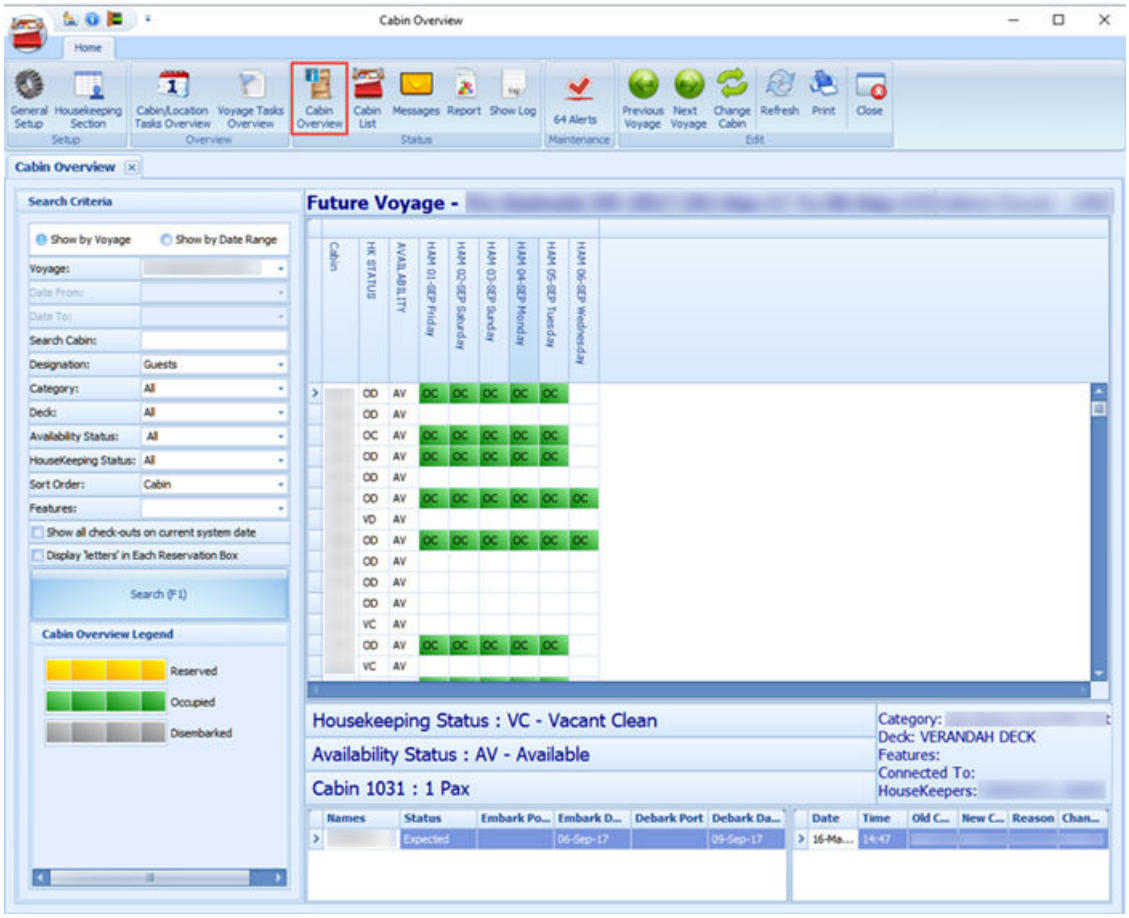


Table 12-5 Cabin Overview Field Definition

Label	Definition
Voyage	Indicates the reservation for the voyage
Date From	Indicates the reservation Date From
Date To	Indicates the reservation Date To
Search Cabin	Indicates the cabin number
Designation	Indicates the type of reservations – guest, crew or resident
Category	Indicates the category of cabin
Deck	Indicates the deck of cabin
Availability Status	Indicates the availability status of the cabin
Housekeeping Status	Indicates the cleaning status of the cabin
Sort Order	Indicates the sorting of reservation to be display
Features	Indicates the feature of cabin
Show all check-outs at current port	Indicates the reservation only shows all check-outs at current port

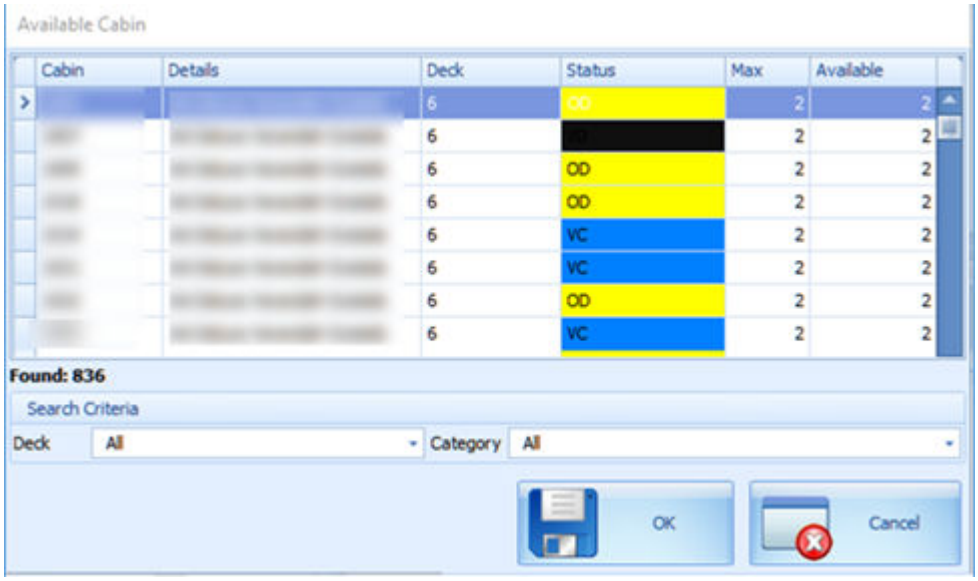
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Table 12-5 (Cont.) Cabin Overview Field Definition

Label	Definition
Display 'letters' in Each Reservation Box	Indicates the options to display the cabin status in alphabetical view for each reservation grid

1. From the Home tab, click **Cabin Overview** on the ribbon bar.
2. At the **Search Criteria** panel, enter the desired criteria and press **F1** or click **Search (F1)**.
3. Click the colored box (green/yellow/grey) of the cabin to preview the reservation information.
4. If **Show By Voyage** is selected, **Previous Voyage** and **Next Voyage** illuminate on the ribbon bar, allowing you to navigate to the previous or next voyage.
5. Select a reservation from the grid and click **Change Cabin** to open the Available Cabin window, allowing you to select another cabin. This feature requires **user access right #557**.

Figure 12-37 Available Cabin



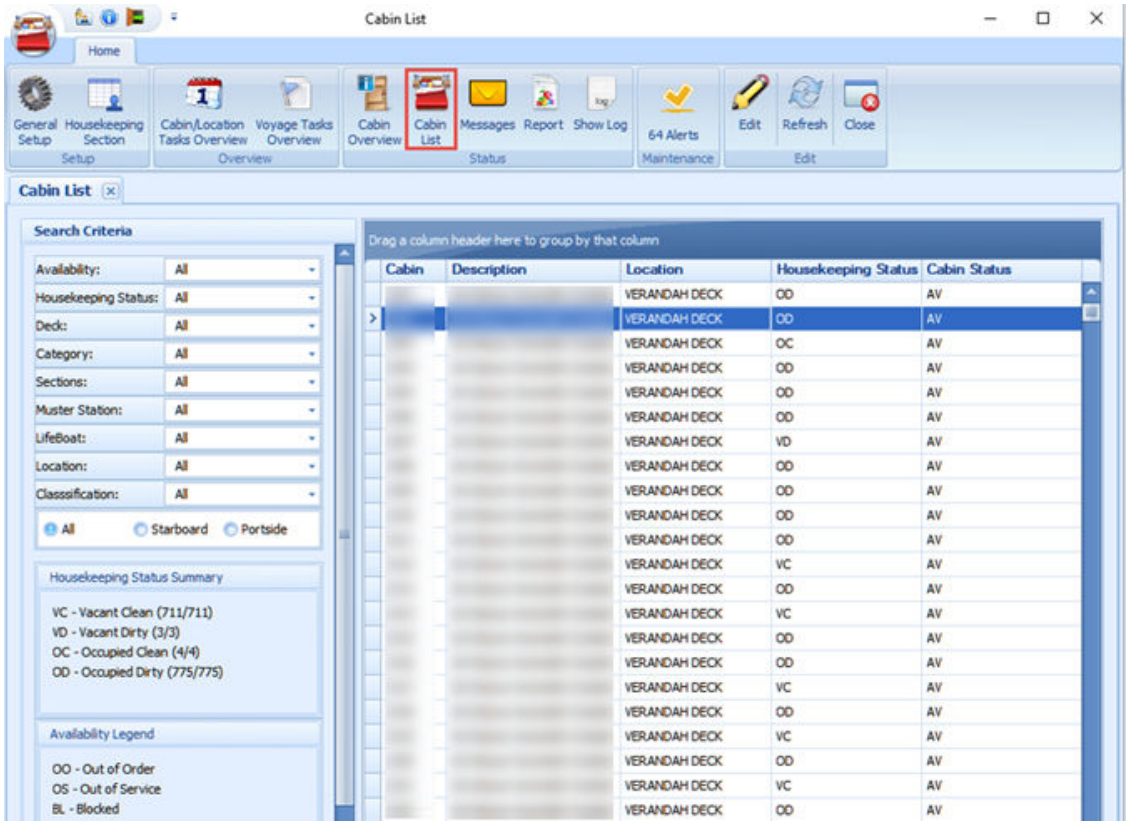
6. Click **Refresh** on the ribbon bar to refresh the information.
7. Click **Print** to print a copy of the Cabin Overview.

Cabin List

The Cabin List is a list view of all guest cabins with the current housekeeping and cabin status. Apart from the cabin list, it also provides a Housekeeping Status Summary and allows you to change the cabin status.

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Figure 12-38 Cabin List Overview



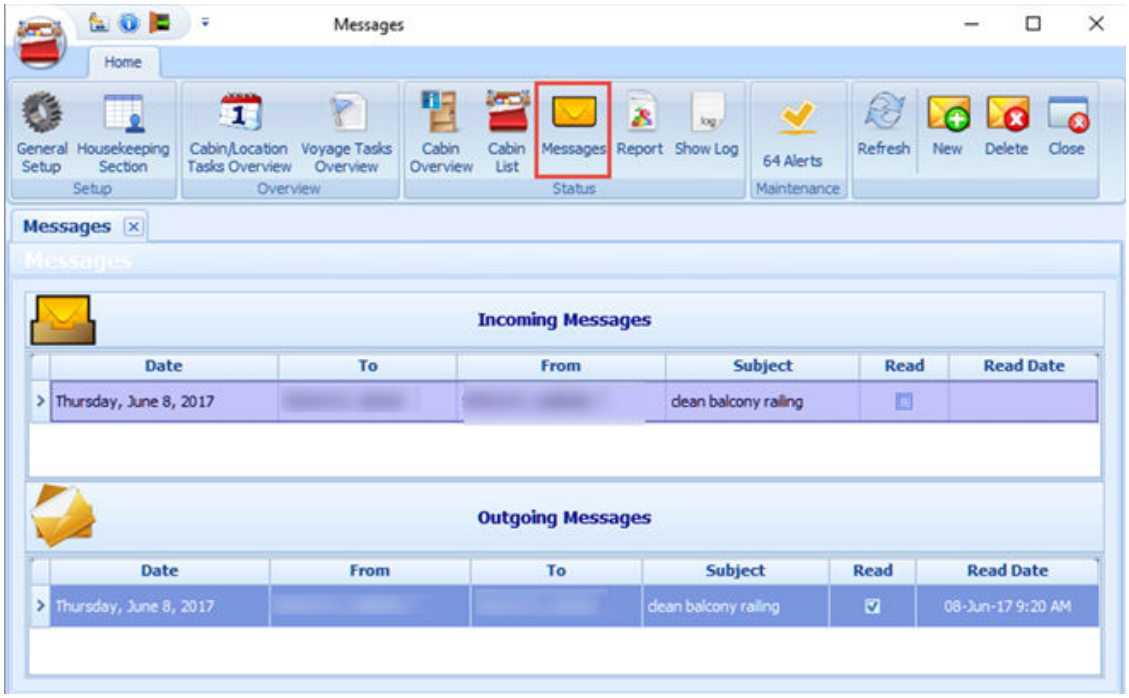
1. From the Home tab, click **Cabin List** on the ribbon bar.
2. The default display of the Cabin List is all cabins. You can use the **Search Criteria** to filter for desired information.
3. To edit the Cabin Status, click **Edit** on the ribbon bar or double-click the **cabin number**.
4. On the Cabin form, select the **Status** from the drop-down list and fill in the information accordingly.
5. Click **Save** to save and exit the form.

Messages

The Messages feature enables you to send internal messages between the housekeepers.

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Figure 12-39 Messages Overview



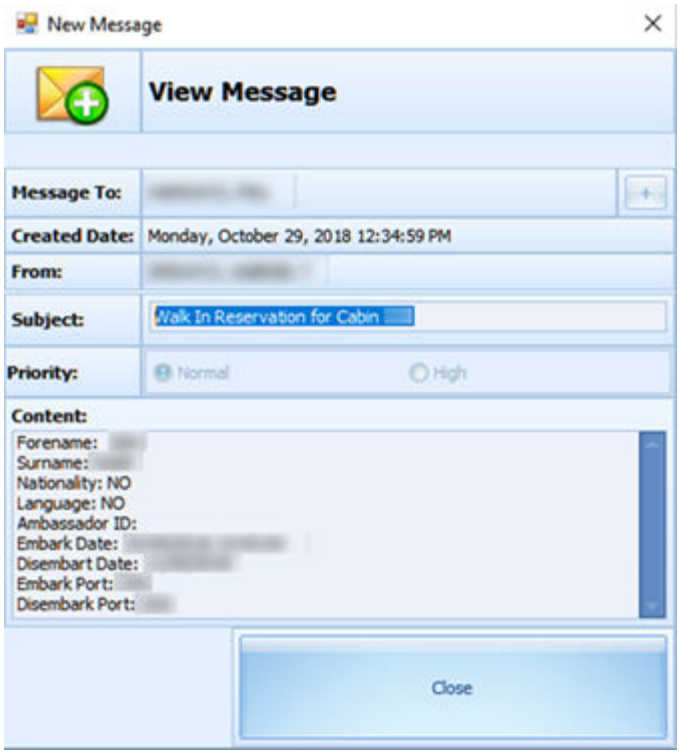
1. From the Home tab, click **Messages** on the ribbon bar.
2. On the New Message form, click **[+]** to open the Crew Selection window.
3. Select the crew to receive the message by selecting the **Department, Position** or **Housekeeping Section** from drop-down list, and click **Search**.
4. Select the **crew** from the Select Crew Members grid.
5. Click the double right arrow (>>) to add the selected crew.
6. Click **OK** to close the window.
7. Fill in the **Message form** accordingly and click **Send**.
8. The Incoming Messages section displays the messages received from other Housekeepers, while the Outgoing Messages section displays the messages sent to other Housekeepers. If the logged in user is part of an Administrator group, the user will see messages in both the Incoming and Outgoing section.

Reading Message

1. When the recipient logs in to the Housekeeping module and navigates to the Messages function, messages are listed in the Incoming Messages section.
2. Double-clicking the message opens the View Message window, allowing you to view the message content.
3. When you click **Close**, this sets the message as Read.
4. Similarly, when the sender opens the Message function, the sender will notice that the Read checkbox is checked, indicating the message has been read.

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Figure 12-40 View Message Window



Deleting Message

Only users from the Administrator group are allowed to delete both Incoming/Outgoing messages.

1. On the Message function, select the **message** and then click **Delete** on the ribbon bar. Multiple selections are allowed.
2. At the confirmation prompt, select **Yes** to proceed or **No** to return to previous window.

Report

Currently, there are no standard Housekeeping reports for a cruise ship. You can set up a new Housekeeping report in the **Administration** module and define the report group under REP_GROUP as ‘HouseKeeping’.

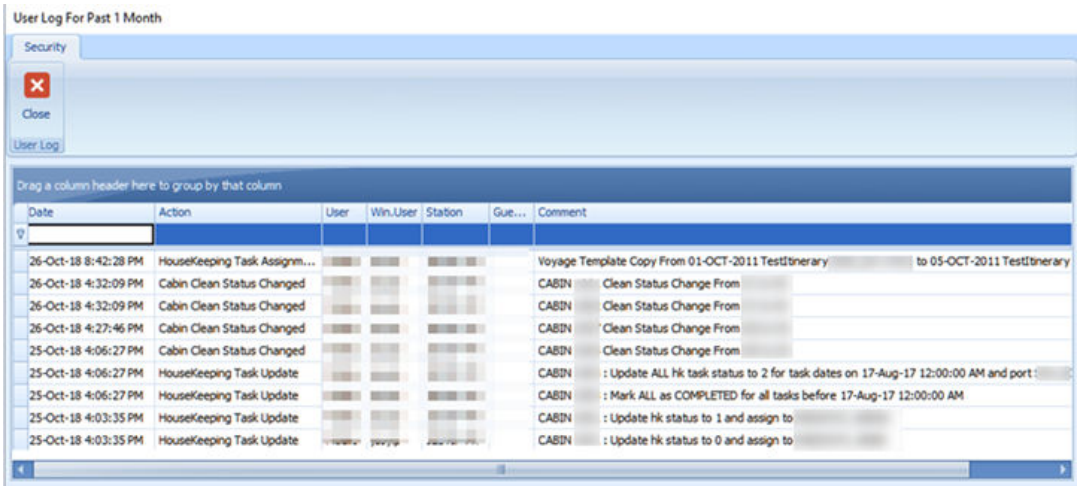
Show Log

The Show Log window displays housekeeping activities for the past one month.

1. From the Home tab, click **Show Log** on the ribbon bar.

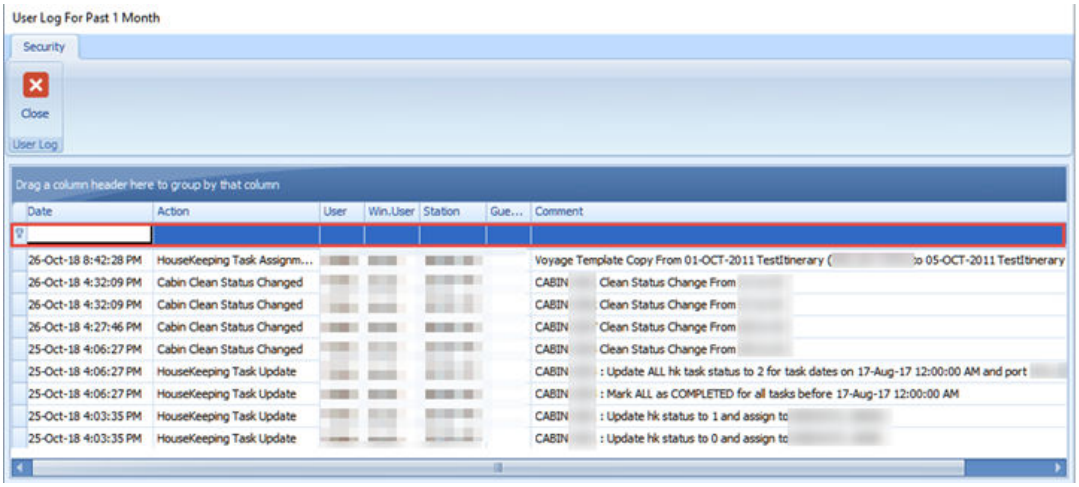
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Figure 12-41 User Log for Past 1 Month



2. Enter the **keyword** in the field below the header to search the log file of the respective column.

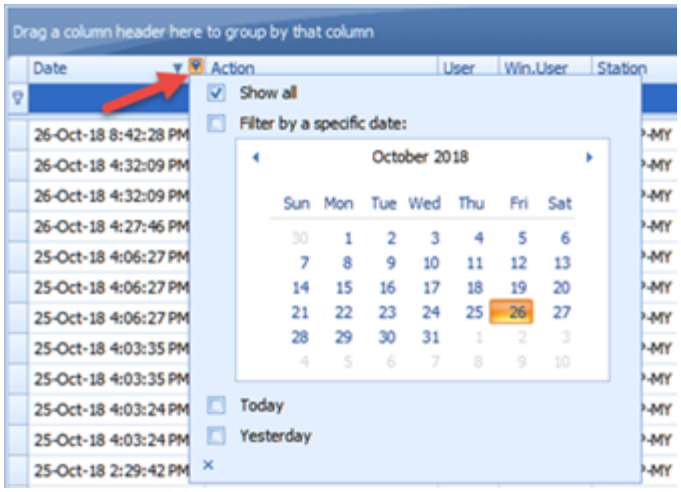
Figure 12-42 User Log Filter Search



3. Click the pushpin on the header column to open a selection dialog, allowing you to filter the information further.

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Figure 12-43 User Log Custom Filters



Appendix

User Security Group

This section describes the user security group available in the Housekeeping module, and the security privileges assigned in the **User Security** module.

Table 12-6 Housekeeping Module Functionality Access Rights

Security Reference No.	Description
557	Cabin Change.
4665	General Setup.
4666	Housekeeping Status.
4667	Task Type.
4668	Cleaning Task.
4669	Grouping of Task by Status.
4670	Cleaning State Color If you do not have access right #4670 assigned, you are not permitted to change the Cleaning State color in the **General Setup, Housekeeping Status** in the Housekeeping module.
4270	Access to Change Cleaning State Color from Administration. If you do not have access right #4270 assigned, you are not permitted to view the Cleaning State color in **Stateroom Setup** in **Administration module**.

Parameters

This section describes the Parameters available in the Housekeeping module. They, are accessible from the Administration module under System Setup, Parameter.

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Table 12-7 PAR Group Safety

PAR Name	PAR Value	Description
Enable Ferry Operation	0 or 1	0 - Disable Ferry Specify Operation. 1 - Ferry Specify Operation.

Table 12-8 PAR Group General

PAR Name	PAR Value	Description
Alter Cabin Status	0 or 1	0 - Disable cabin status changes for any updates of cabin clean status 1 - Enable cabin status changes for any updates of cabin clean status. **Note:** This parameter must be enabled so that the cabin status is updated whenever someone checks in/out or is moved to another cabin. This is the pre requisite for tasks to be created in Housekeeping.

Table 12-9 PAR Group Housekeeping

PAR Name	PAR Value	Description
Bypass Change of Cabin Clean State Upon Check-Out	0/1	0-Do not bypass, 1-Bypass To control the change of cabin clean state upon guest check-out
Enable Auto Alert Message upon Guest Cabin Change	0/1	0-Disable auto alert, 1-Enable auto alert To create an alert message for the housekeepers when a guest changes Cabin
Enable Auto Alert Message upon Guest Check-In	0/1	0-Disable auto alert, 1-Enable auto alert To create an alert message for the housekeepers when a guest checks-in
Housekeeping Positions	For example, 010	Stores all the OPO_ID for housekeeping crew
Minimum number of days onboard for Linen Change	For example, 8	Minimum number of stays onboard before a linen change is required for the cabin
Overnight Rush Cabin Before Midnight Hours	For example, 18	If par value is 6, then the system will consider cabins as rush cabins when it has guests checking-out 6 hours before midnight.

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Table 12-9 (Cont.) PAR Group Housekeeping

PAR Name	PAR Value	Description
Overnight Rush Cabin Extended Hours	For example, 8	If par value is 8, then the system will cover rush cabins up until the 8th hour after midnight.
Validate Cabin Clean Status before Update	0/1	Do not allow to update to cabin clean status to VC/VD if cabin is occupied.
X day Before Check-Out To Skip Linen Change	For example, 3	*X* day to skip linen change just before the expected checkout date. If checkout date is on 15th and par value=2, then skip any linen changes on 13th & 14th.
X day to Change Linen	For example, 4	*X* day to change linen after check-in. If check-in date is on the 1st and par value=3, then linen change is done on the 4th.

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13

Maintenance Module

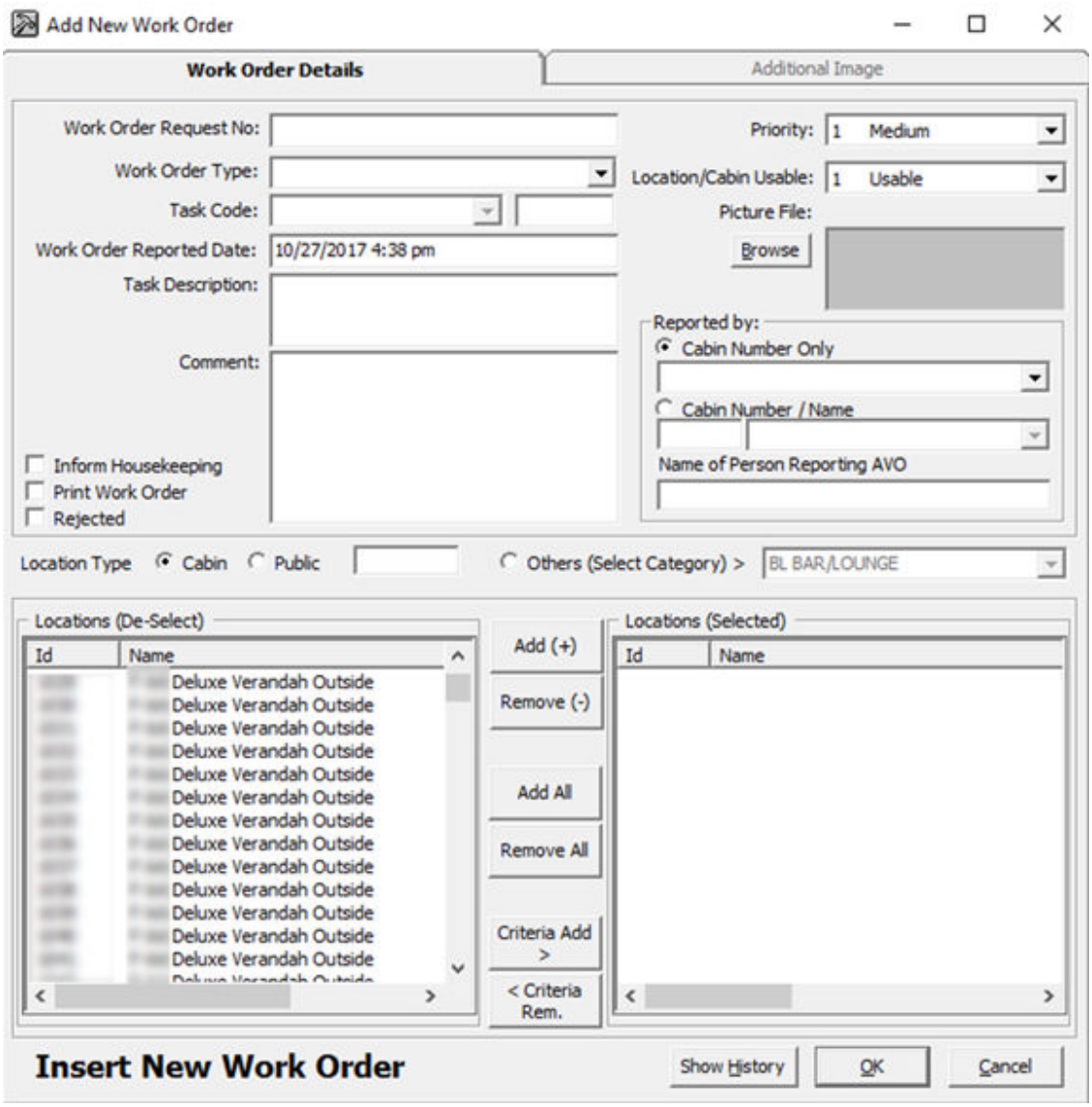
The Maintenance module enables recording all required maintenance work aboard the ship, whether in cabins, public locations, or elsewhere, and scheduling preventive maintenance. Its functions include creating work orders, printing reports, and reviewing past maintenance activities.

Work Orders

The Work Orders can be added as a single order or in a batch using the Criteria Add function. Entries of the work order are not limited to the Maintenance module. This function is also available in **Management module, Front Desk**, and in **Add Work Order**.

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Figure 13-1 Add New Work Order Form



Adding a Single Work Order

1. From the Work Orders menu, select **Add Work Orders**.
2. In the Add New Work Order form, enter the **external document number** in the **Work Order Request No.** field, if any.
3. Select the **Work Order Type** and **Task Code** from the drop-down list.
4. Enter the **Task Description** and **Comment** in the respective fields.
5. Select the **Priority** and **Location/Cabin Usable Status** from the drop-down list and attach a picture file, if any. You can select a different **Priority** and **Location Usable Status** other than the predefined status when adding or editing a work order.
6. In the Reported By section, select the **Cabin number** and enter the **Name of Person Reporting AVO**.

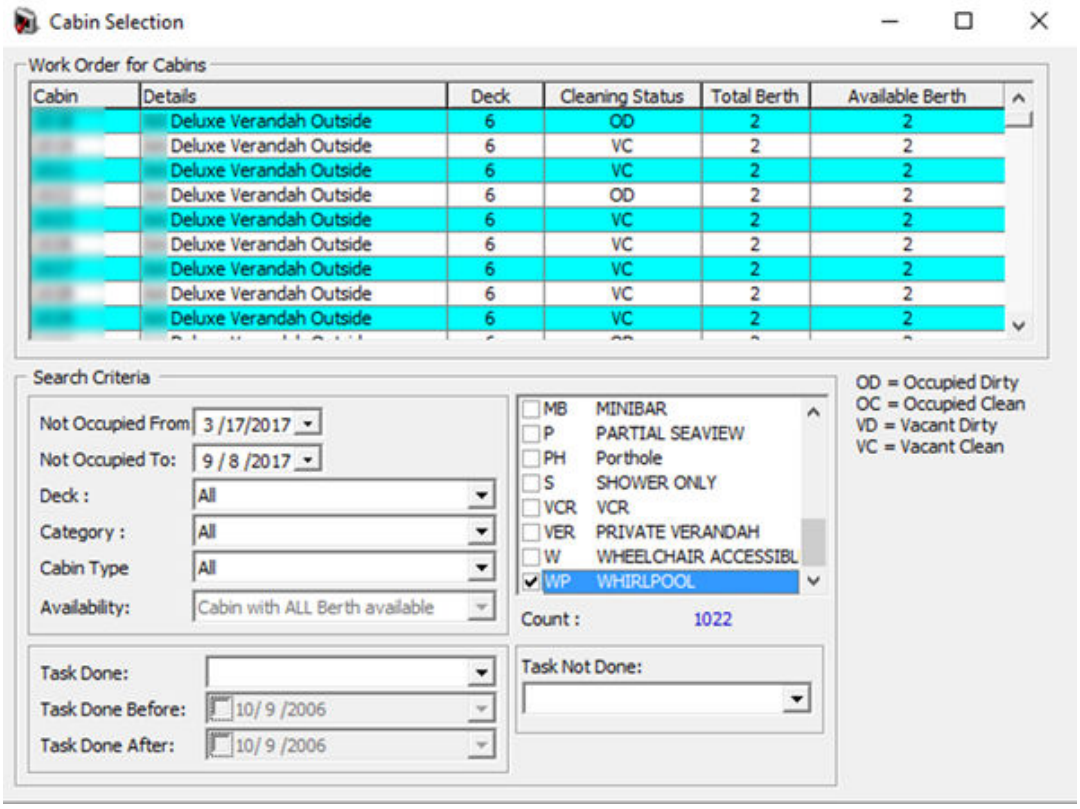
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7. For the Location Type, select **Cabin, Public** or **Others (Select Category)**, and then navigate to the Location section and select the exact location(s) from the grid.
8. Click **Add** to add the location to Location (Selected) section.
9. To deselect the location from the Locations (Selected), select the **item to remove** and then click **Remove(-)** or **Remove All**.
10. Click **OK** to save the work order.

Adding Work Orders by Batch

1. Repeat steps 1 to 6 from the steps above.
2. Click the **Criteria Add>** button located between **Locations (De-Select)** and **Locations (Selected)** to start the Cabin Selection window.
3. In the Cabin Selection window, navigate to the **Search Criteria** section, select the **criteria** from the drop-down list, select the **required filter**, and then click **Refresh** to update the information in the grid.

Figure 13-2 Cabin Selection Criteria



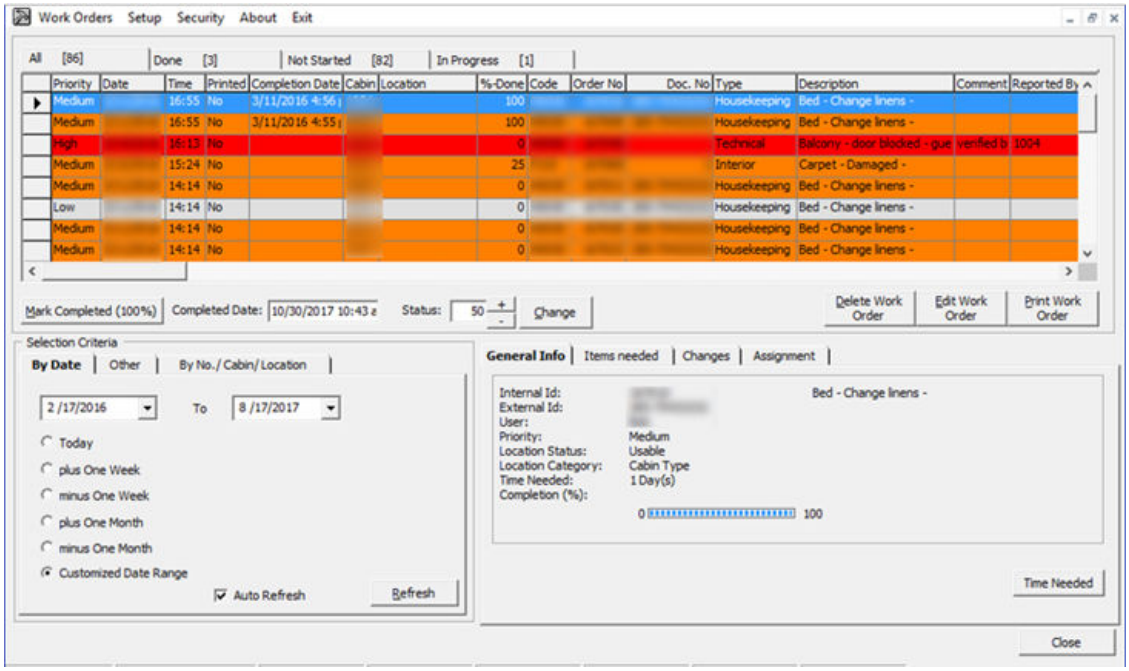
4. Click **OK** to add the selection to **Locations (Selected).**
5. To deselect the location from **Locations (Selected)**, select the item to remove and then click **Remove(-)** or **Remove All**.
6. Click **OK** to complete the work order.

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Work Order Overview

The Work Order Overview provides an overview of the completed, pending, or in progress work order. It also allows editing, printing, and assigning work orders to the Maintenance team.

Figure 13-3 Work Order Overview



The Work Order Overview window is comprised of: the following:

- A grid view of all work orders by status and its corresponding count.
- Functions to Delete, Edit and Print Work Order.
- A display view by date, others and by No/Cabin/Location.
- Detailed information on the work order — General info, Items needed, Changes and Work Order Assignment.

Searching for Work Order

Using the Search Criteria, you can filter work orders by date, other criteria such as Work Order Type, User or external number, Cabin or Location.

1. At the Work Order Overview window, **Selection Criteria** section, select the filter from the available tab.
2. Click **Refresh** to refresh the information on the grid.
3. You can sort the information shown on the Overview grid by clicking the column header and support columns, which are: Priority, Date, Time, Printed, Completion Date, Cabin Location, %-Done, Code, Order no, Doc. No, Type and Description.

Editing a Work Order

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1. Select the **Work Order** from the grid and click **Edit Work Order**

   .

2. In the Update Work Order form, edit the necessary information and click **OK** to save the changes.

Rejecting a Work Order

Submitted work orders can be rejected due to insufficient materials, against regulations, too costly or need to wait until the ship reaches the dry dock. Such work orders should be marked as rejected instead of completed.

1. Select **Work Order** from the grid and click **Edit Work Order**.
2. Select the **Rejected** checkbox for the Comment field, and click **OK** to save. The system places a check mark in the Rejected column on the Overview window.

Deleting a Work Order

1. Select the Work Order from the grid and click **Delete Work Order**.
2. At the confirmation prompt, click **Yes** to confirm.
3. Enter the reason to delete the work order, and click **OK** to proceed.

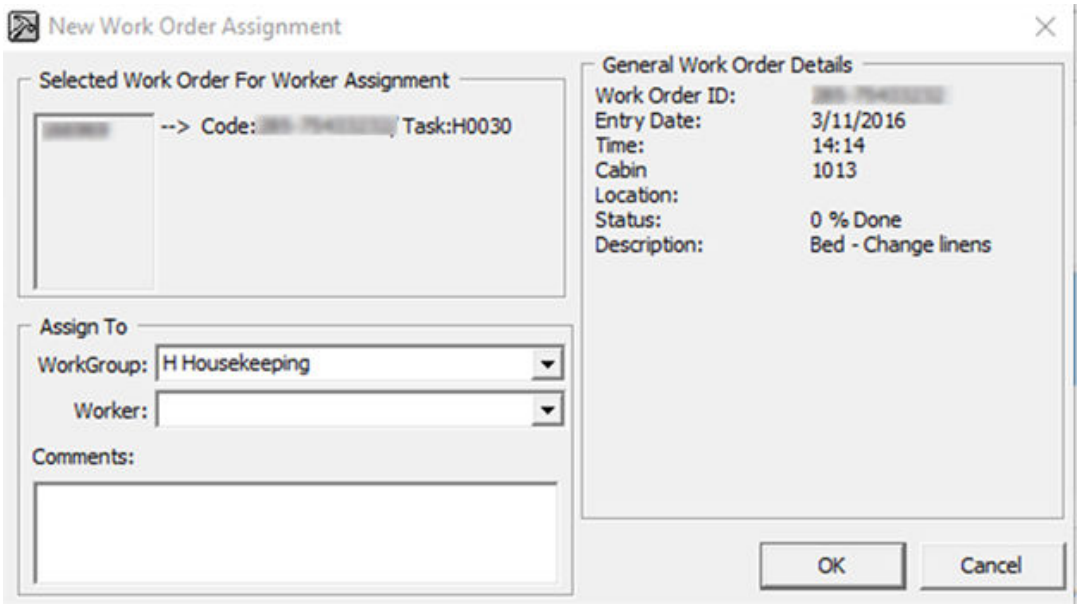
Printing a Work Order

1. Select the work order from the grid and click **Print Work Order**.
2. At the Print Job confirmation prompt, click **OK** to print.

Assigning/Editing/Deleting an Assignment

1. Select the Work Order from the grid and navigate to the Assignment tab window.
2. In the Assignment tab, click **Assign Work Order**.
3. On the New Work Order Assignment form, Assign To section, select the **Work Group** and/or **Worker**, from the drop-down list and click **OK** to confirm.

Figure 13-4 New Work Order Assignment



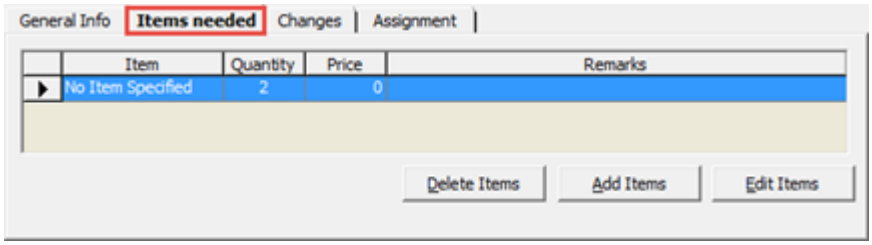
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4. The status of the assigned work order will change and appear under the **In Progress** tab. The Date, Time, Assigned By and Worker are visible in the **Assignment** tab of the work order.
5. To edit an assignment, select the work order from the **Assignment** tab, click **Edit Assignment**, and click **OK** to save the changes.
6. To delete an assignment, select the work order from the **Assignment** tab, and click **Delete Assignment**.

Adding/Editing/Deleting Items Needed in Work Order

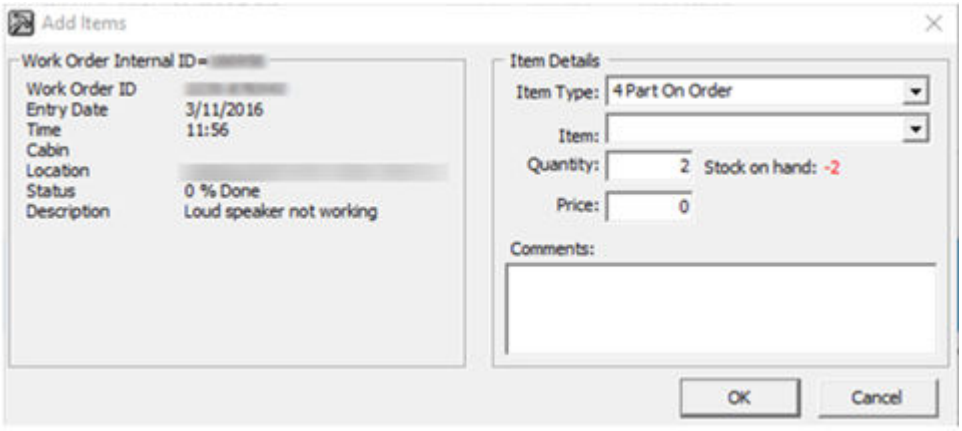
Replacement parts for the assigned job can be added to the Work Order.

Figure 13-5 Items Needed



1. Select the work order from the Overview tab.
2. In the Items needed tab, click **Add items**.
3. Select the **Item Type** and **Item** from the drop-down list, and enter the required quantity and price, if any.

Figure 13-6 Add Items



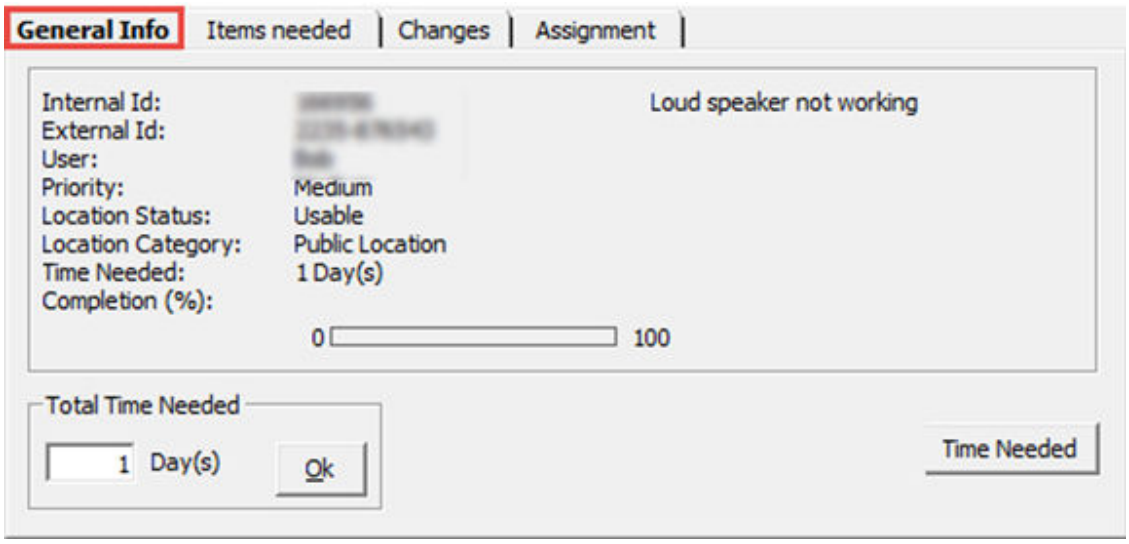
4. Click **OK** to save.
5. To edit the items needed, select the item from the grid, click **Edit Items**, and click **OK** to save the changes.
6. To delete the items needed, select the item from the grid, and click **Delete Items**.

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General Information of the Work Order

In the **General Info** tab of the selected work order displays information such as Internal ID, User, Priority Location, Time Needed and Completion %.

Figure 13-7 General Info Tab

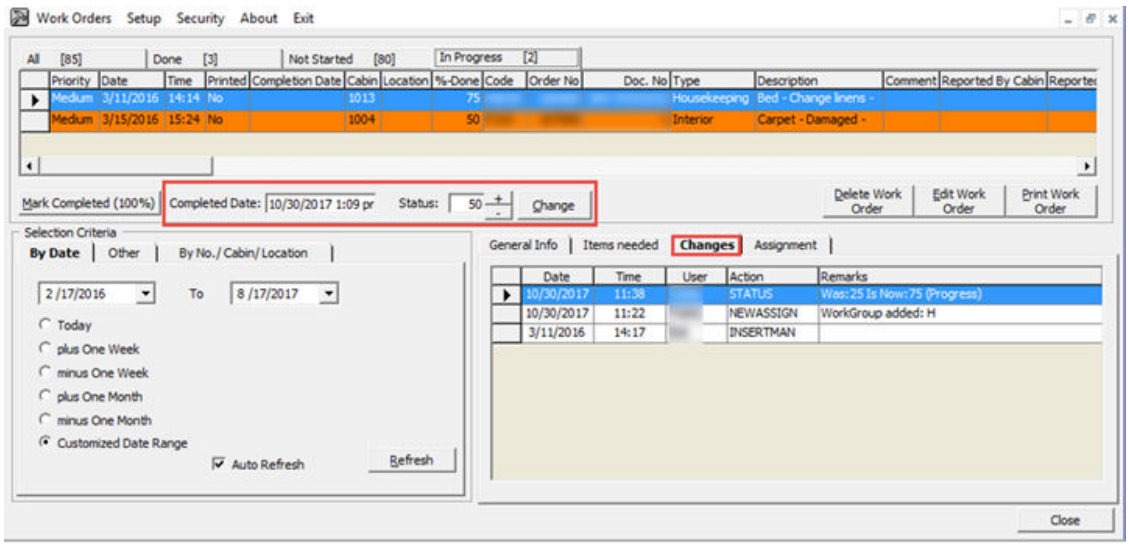


The total time needed is adjustable by clicking the **Time Needed** button. Update the day(s) field and click **OK** to save.

Updating Work Order Progress Status

As the work progresses, you may need to update to the work order periodically.

Figure 13-8 Updating Progress / Completion Status



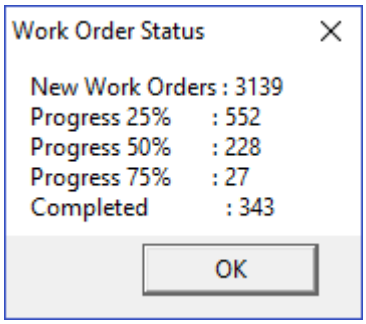
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1. From the **Progress** tab, select the work order to update.
2. In the middle section of the Overview window, enter the **completed date**, then set the **Status** using the (+/-) symbols and click **Change** or click the **Mark Completed (100%)**. A work order that is marked as complete is listed in the **Done** tab.
3. The percentage of completion is logged in **Changes** tab.

Work Order Status

The Work Order Status provides a quick count of the number of the new work orders entered, in progress, or completed. You can access this information from Work Orders, Work Order Status.

Figure 13-9 Work Order Status Count

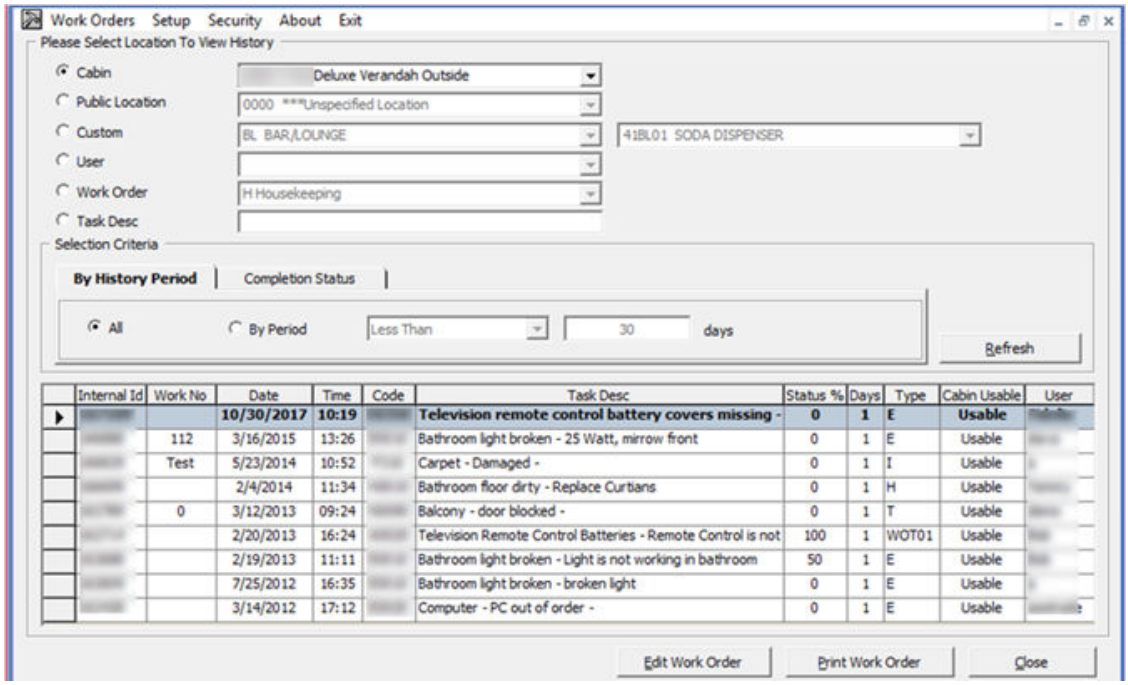


View Location History

The View Location History enables you to retrieve past work orders by location, users, type of work order, or task description, and information is filtered by date or completion status and can be printed from this function.

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Figure 13-10 View Location History Window



1. In the View Location History window, select one of the options from the drop-down list.
2. Make your selections from the Selection Criteria section and click **Refresh** to populate the information on the window.
3. Select the work order and click **Edit Work Order** to open the Update Work Order window. This function does not work if the selected work order is marked as complete.

Reports

Reports are added in the Administration module, under the Maintenance report group and are printable from the Maintenance module.

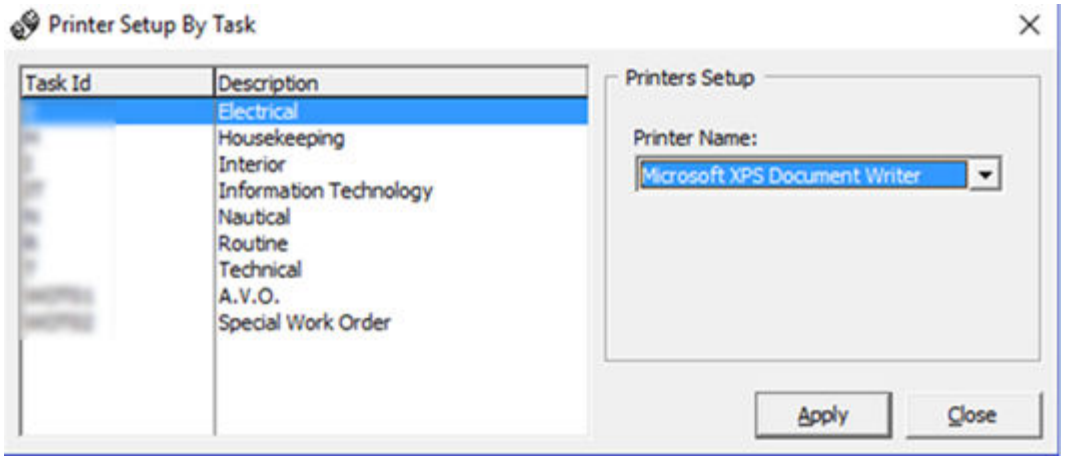
1. To view the available reports, click **Reports**.
2. To print a report, select the **report** and click **Print**.
3. To view a report, select the **report** and click the **Preview** tab.
4. To export a report, select the **report** and click the **Export**.

Task Printers

A printer may be assigned according to the Task ID, making it easier for the task to be delivered efficiently.

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Figure 13-11 Task Printer Assignment

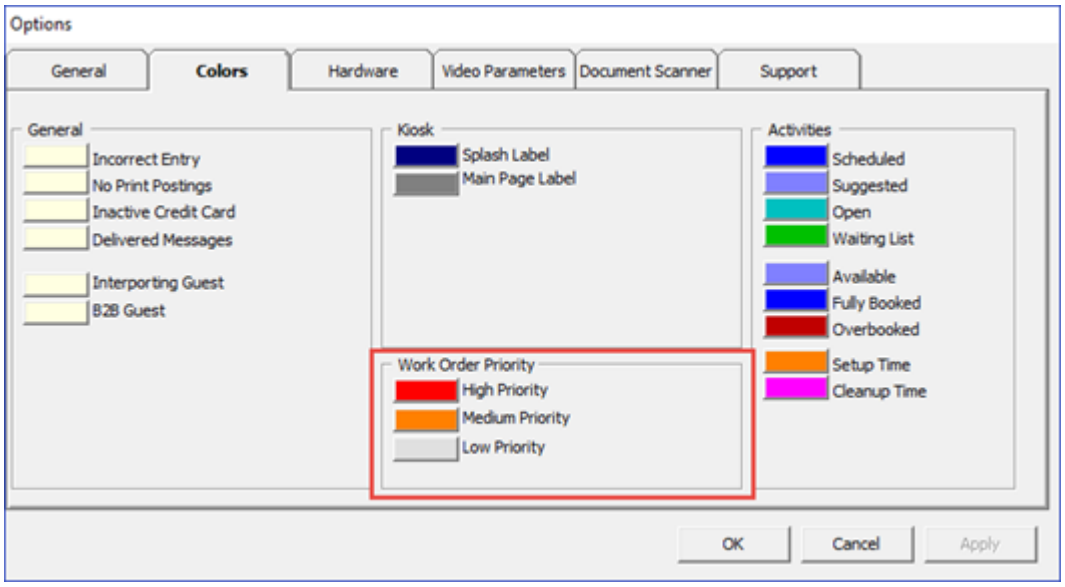


1. From the Main window, select **Setup** and then select **Task Printer**.
2. Select the **Task ID** and then select the **printer name** from the drop-down list.
3. Click **Apply** to save.

Other Settings

The colors of the work order priority can be defined according to the Ship's standard and changed in the **Management module, Options, Colors**.

Figure 13-12 Work Order Priority Color Chart



User Security Group

This section enables you to access the Maintenance function. The security privilege is assigned to you through the **User Security** module.

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Table 13-1 User Access Rights

Security Reference No.	Description
342	Work Orders
343	Overview
664	Delete other user work order
669	Edit Work Order
670	Delete Work Order
671	Print Work Order
4477	Allow Edit Completed Work Order

Parameters

This section describes the Parameters available to the Maintenance module. They are accessible in the Administration module under System Setup, Parameter. Changing these parameters alters the program behavior. Consult Oracle Customer Support for further clarification if you are unsure of the definition.

Table 13-2 PAR Group — Maintenance

PAR Name	Description
Allow Modify Work Order Date Time	Enable modification of work order date/time. 0 = Do not allow 1 = Allowed to modify work order reported date time
Default Tab for Work Overview	Define the default tab to show. 0 = All 1 = Done 2 = Not Started 3 = In Progress
Hide Work Order Request No	Define Work Order Request No to be shown in Work Order Window. 0 = To show on window 1 = To hide from window
Maximum picture size allow	Specify the maximum picture size allowed
Print By Task	Enable Printing by Task. 0 = No print maintenance task 1 = Print

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14

Tools

The OHC Tools is a program designed to manage data security within SPMS. It secures sensitive information like credit card data using encryption keys, facilitates database password changes, and enables secure export/import of databases, among other security measures.

OHC Tools Functionality

The OHC Tools is an application that manages the data security, credit card data encryption, and database password change, and has an added database import/export functionality.

Figure 14-1 Functions in OHC Tools Home Tab

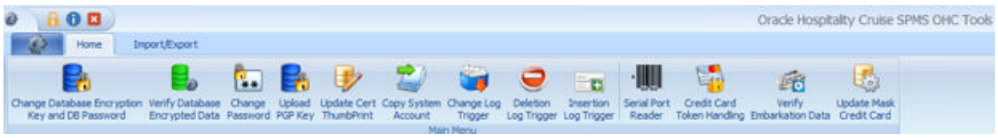


Figure 14-2 Functions in OHC Tools Import/Export Tab



Change Database Encryption Key and DB Password

The Change Database Encryption Key allows you to secure and protect important data such as credit card information and user passwords stored in the database using an encryption method compliant with PA-DSS policy.

Best Practice:

Do not change encryption key during a cruise.

Only change encryption key before or after a cruise.

Creating an Encryption Passphrase

1. Log in to the OHC Tools application and select **Change Database Encryption Key and DB Password** from the ribbon bar.
2. In the Encryption Key Manager window, enter the **Passphrase1** and **Passphrase 2, Old Password, New Password,** and **Confirm New Password**.

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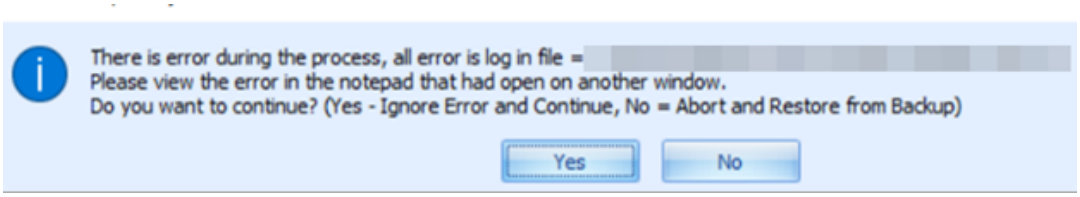
3. Click **Apply** to proceed. The system prompts you with a message: *"Please ensure there is no application currently running in order to prevent data corruption later"*.
4. If Transparent Data Encryption (TDE) is used, the system performs a database backup, allowing you to restore at a later stage. This requires a password for the DMP file. If an error were to occur during the backup, you will be prompted to enter the same password and it must be identical.

Figure 14-3 DMP Password



5. Click **OK** to continue, and the program prompts a request to stop running applications, if any.
6. When the Change Encryption Key begins, program performs a backup process on tables that need to be re-encrypted.
7. If corrupted data is found during the encryption process, the system continues the process and prompts a warning at the end of the process before generating an error log.

Figure 14-4 Encryption Failed Warning



8. At the error prompt, select **Yes** to continue replacing the encryption key or **No** to roll back the process by restoring the backup.
9. The passphrase is saved in Secure Credential and is valid for one year from the date of encryption.

Verify Encrypted Database Data

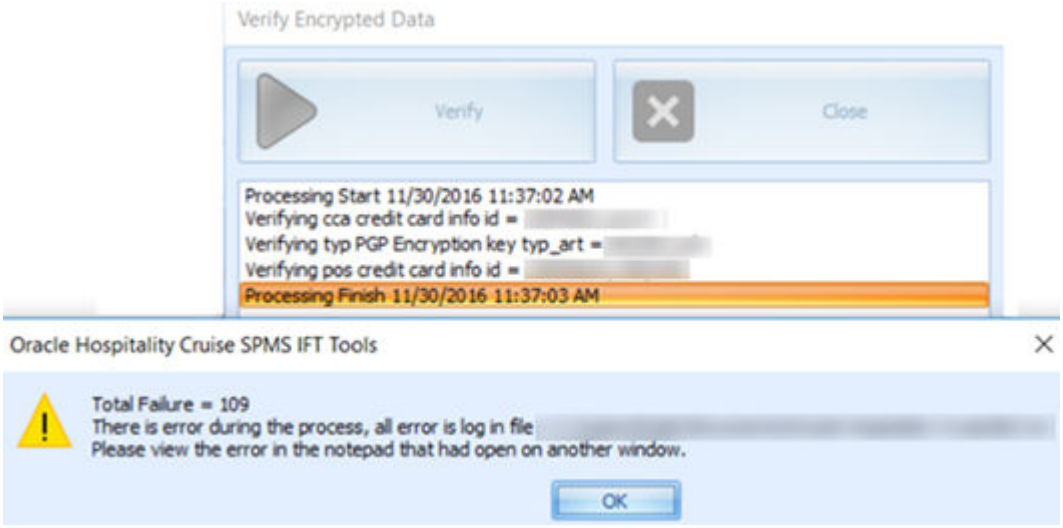
The **Verify Database Encrypted Data** function verifies the encrypted data and confirms that encryption can be change before performing the Change Encryption Key.

1. In the Tools application, select **Verify Database Encrypted Data** from the ribbon bar.
2. In the Verify Encrypted Data window, click **Verify**.

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3. The Verify Database Encryption Data verifies data in the User login credentials, Parameter, Reservation, POS Information, (PGP Key), Credit Card Registration, Transfer, and Authorization
4. If the verification returns a failed message, possibility due to invalid data, correct the error and repeat the process.

Figure 14-5 Verify Encrypted Database



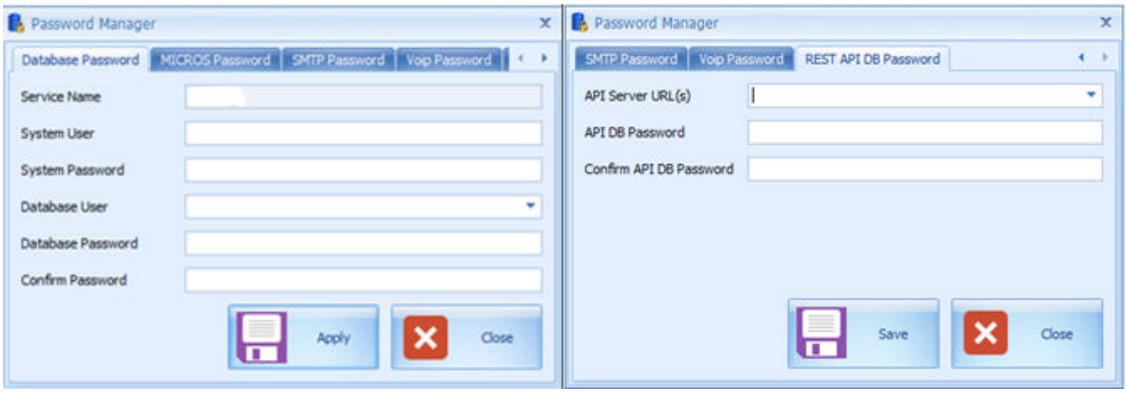
5. Click **Close** when the process finishes.

Change Password

The Change Password function enable users to update passwords for databases, MICROS, SMTP and VOIP. Additionally, it updates the database password in REST API Server, preventing user from modifying the passwords directly through an external database tools.

You are ***not permitted*** to change the Ship's DB password while the Quick Check In (QCI) Sync application is running. Additionally, you must have the necessary Database privileges granted before proceeding.

Figure 14-6 Password Manager Window



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1. In the Tools window, select **Change Password** from the ribbon bar.
2. In the Password Manager window, enter the system **User, System Password, Database User,** and **Database Password, Confirm Password**. All passwords must adhere to established password policies, including minimum length and complexity requirements.
3. Click **Apply** to update the database password and save the encrypted password to Secure Credential file.
4. Repeat the steps above to change the password for MICROS, SMTP, and VOIP.
5. To update the database password to multiple REST API Servers, select REST API DB Password tab.
6. Enter or select the **API Servers URL(s)** from the drop-down list, enter the **API DB Password** and **Confirm API DB Password**. All passwords must adhere to established password policies, including minimum length and complexity requirements.
7. Click **Save** to update and encrypt the REST API DB password.
   If connection to any of the REST API Server fails, run the Cruise Property Management System installer in **Maintenance mode, Repair Product** option and update the REST API DB password.

Upon database password is updated successfully via **Change Database Encryption Key and DB Password** or **Change Password** option, system will automatically update SPMS REST API database credential.

To enable this feature, you must configure the SPMS Web Application REST API base path from the **Administration module, System Setup, and Database Parameters Setup**. Set the endpoint at **SPMS REST API** group, **REST API Base Path**. It supports multiple endpoint with comma (,) as a delimiter.

Sample of the REST API base path: `https://<API server hostname>:<port number>, https://<APIserver2 hostname2>:<port number2>`

This feature applies to:

- **FIDELIO** schema only.
- SPMS Web Application - **Cruise Property Management System** and **Cruise Property Management Border Control**.

> **Note**
>
> 1. The REST API Service *must* be restarted after successfully updating the REST API configuration file.
> 2. In the case the database password was successfully updated, but failed to update in SPMS Web Application REST API, user could change the REST API DB password from Password Manager.
> 3. The database password change supports both Cruise Property Management System and Border Control application.

Upload PGP Key

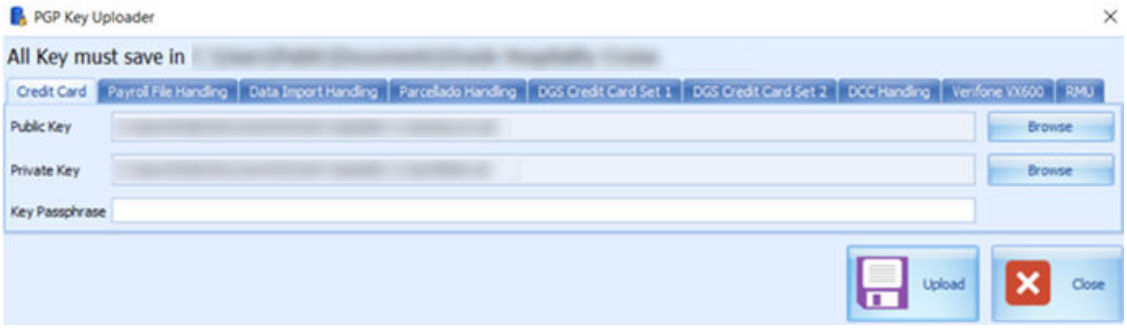
The Upload PGP Key function is used to upload the Public Key (.pkr) and Private Key (.skr), a key pair for function that requires a Pretty Good Privacy (PGP) Key, for example, Payroll,

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Credit Card, DGS Resonline and Data Import handling. You can only generate a key pair using a third party tools such as PortablePGP and FileAssurity OpenPGP. See *PA-DSS 3.2 Implementation Guide* for more information.

For Credit Card processing, the Ship sends the public key to the credit card provider and in return receives a public key from the provider.

Figure 14-7 PGP Key Uploader



1. In the Tools window, select **Upload PGP Key** from the ribbon bar.
2. In the PGP Key Uploader window Credit Card tab, click the **Browse** button next to Public Key and select a **.pkr file** to upload. To upload a Private Key, click the **Browse** button next to Private Key to select an **.skr file**.
3. Enter the **Key Passphrase** if the key is generated with a specific passphrase.
4. Click **Upload** to upload the keys. The system prompts you with "*Key upload is done successfully*" when upload completes and stores both of the encrypted keys in `TYP_PGP` table.
5. For DGS Credit Card handling, a key version is required.

> **Note**
>
> The PGP Key has an expiry date and you must generate a new PGP Key and re-upload to the database once you receive a reminder. The program does not allow you to reuse the same PGP Key.

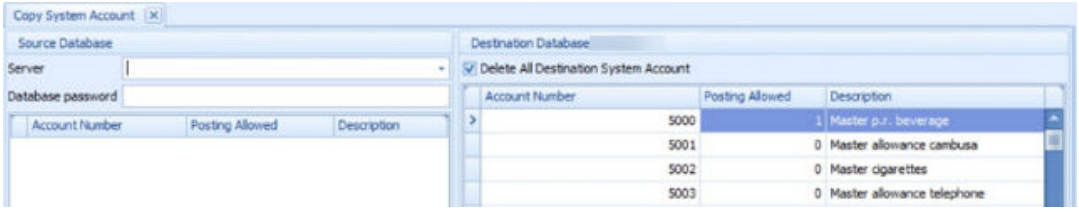
Copy System Account

The Copy System Account function copies the System Account from one database to another database.

1. In the Tools window, select **Copy System Account** from the ribbon bar.
2. In the Copy System account window, select the source database from the Server drop-down list and enter the **User password**.
3. At the end of the ribbon bar, click **Connect** under the **Copy System Account** group. The system accounts shall populate if the connection is successful.

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Figure 14-8 Copy System Account



4. Check the **Delete All Destination System Account** to add or remove the account in the destination database. This is only possible when no posting exists in the account during the copy process.
5. Click **Copy** to complete the process.

Change Log Trigger

The following function creates a Database Trigger that logs changes made to selected fields. Values from the selected fields are stored the log in the Payroll Audit Trail table.

1. In the Tools window, select **Change Log Trigger** from the ribbon bar.
2. In the Create Change Log Trigger window, check the table on the left pane and then navigate to the Monitor Column on the right pane.
3. In the Monitor Column, select the required change fields to log into the Payroll Audit Trail table and then navigate to the Acc ID Column tab.
4. In the Acc ID Column tab, select the field to write into Payroll Contract Account ID.
5. Click **Create Change Log Trigger** at the ribbon bar to create the trigger.
6. Repeat the above steps to add more table field.

Delete Log Trigger

This function creates a Database Trigger that logs data deletion activities of the selected fields. Values deleted from the selected fields are logged into the Audit Trail Deletion table.

1. In OHC Tools, select **Delete Log Trigger** from the ribbon bar.
2. From the Create Deletion Log Trigger window, navigate to the the Description column
3. Under the Description column, select all the fields so that their changes are logged into the SDR table
4. Navigate to the Acc ID column tab.
5. In the Acc ID Column tab, select the fields that will be written into the SDR_ACC_ID
6. Click **Create Deletion Log Trigger** on the ribbon bar to create the database trigger.
7. The system prompts a number of database triggers that track created/deleted/uploaded fields. Click **OK** to continue.
8. Repeat the steps above to add more table fields.

Insert Log Trigger

This function creates a Database Trigger that logs the data insertion activities of the selected fields. Values added from the selected fields are logged into the Audit Trail Insertion table.

1. In the Tools window, select **Insertion Log Trigger** from the ribbon bar.

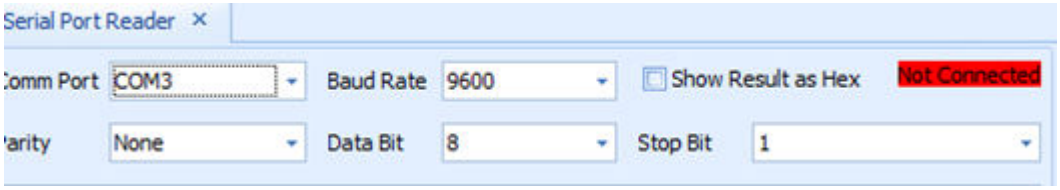
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2. In the Create Insertion Log Trigger window, select the table on the left pane by selecting the checkbox and then navigate to the **Description Column** on the right pane.
3. In the **Description Column**, select the fields logged into the Audit Trail Insertion table.
4. Navigate to the **Acc ID Column** tab, and select the **field** to write into the Audit Trail Insertion Account ID.
5. Click **Create Insertion Log Trigger** on the ribbon bar.
6. The system prompts a number of database triggers that tracks created/deleted/uploaded fields. Click **OK** to continue.
7. Repeat the above steps to add more table fields.

Serial Port Reader

The Serial Port Reader is a tool to test the reader connection with the barcode or card reader COM port.

Figure 14-9 Serial Port Reader Setting



1. Connect the device to the PC and click **Serial Port Reader**on the ribbon bar.
2. In Serial Port reader window, select the **Com Port, Parity, Baud Rate, Data Bit**, and **Stop Bit**.
3. Select the **Show Result as Hex** checkbox to show read results in Hexadecimal format.
4. Click **Connect**. The connection indicator turns to green if the device is successfully connected.
5. Press **any button** on the device to start reading a barcode. The result shown in the text field.
6. Click **Clear All Text** to clear the field.

Credit Card Token Handling

This function fixes the credit card data before transferring it from a non-token authorization to token handling. This special tool is used to ensure all existing Credit Card Authorizations (CCA) and Credit Card Settlement (CCT) records are process before changing the credit card format to SERVEBASE Tokenization handling.

1. In the Tools window, select **Credit Card Token Handling** from the ribbon bar.
2. At the Credit Card Token Handling prompt “By doing this, you are agreeing to use credit card tokenization handling”, select **Yes** to agree or **No** to return to the main menu.
3. In the Oracle Hospitality Cruise SPMS Credit Card Tokenization window, click **Process** and select **Yes** to implement the credit card handling.

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4. When you click **Yes**, credit card verification begins based on the following criteria:
   a. Parameter ‘Not Specified’, ‘CC Transfer Format’ is not ‘SERVEBASE’.
   b. No outstanding status for CCA record, where status is = 0
   c. No outstanding status for CCT record, where status is =0
5. If the above criteria are not met, the change token handling will not proceed and the following message appears: *“There are some authorizations still pending”*..
6. Check and correct the CCA and CCT records and the repeat the above steps when ready.
7. When the Process completes successfully, the system prompts a message: *“Credit card token handling is implemented”*. The parameter ‘Not Specified’, ‘CC Transfer Format’ is updated to SERVEBASE and all credit card records are deactivated.

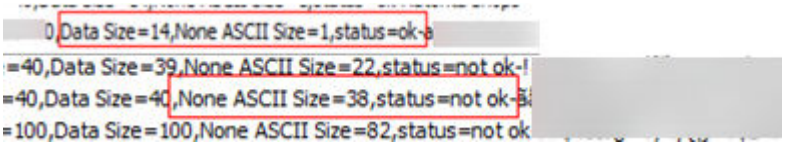
Manual activation is not allowed and the system prompts: “Settlement or reversal is done for this card, please get credit card again”.

Verify Embarkation Data

This function validates and lists all VARCHAR2, CHAR fields that haves ASCII value of more than 127. For example: €, ‡, Œ, Ž, ¢, ©, ®. The verification validates the reservation fields used in the Advanced Quick Check In application such as `CAB, RES, CRD, SEC, SIG, USR, UXP, VIS_BLOB, VIS_TEXT`.

1. In the Tools window, select **Verify Embarkation Data** from the ribbon bar.
2. In the Verify Embarkation Data window, select the **relevant options** and **Include Check In** if you want to include check-ins.
3. Click **Verify Data** to proceed with verification. Below are the sample results shown in the verification window:
   - The Non-ASCII code size less than 18 characters will have status as *OK*.
   - The Non-ASCII code size that are more than 18 will have status shown as *Not OK* and listed with “*There is potential x problem(s) found, please review the log file VERIFYDATA_yyymmdd.txt*”.

Figure 14-10 Verify Embarkation Data



Export Database

The Export Database function enables you to export certain data tables from the database. The export function only exports table, data, index, and trigger and does not export the view or sequence.

1. In the Tools Import/Export tab, select **Export Database** from the ribbon bar.
2. In the Export Database window, enter the 16–digits **Encryption Key** for the dump file.
3. Select the **table** to export individually or click **Select All** at the ribbon bar for all tables.

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4. Click **Backup** on the ribbon bar to compress and encrypt the data table. The system prompts 'File had been backup to `'C:\<FilePath>\<Filename>'` when the export is ready.

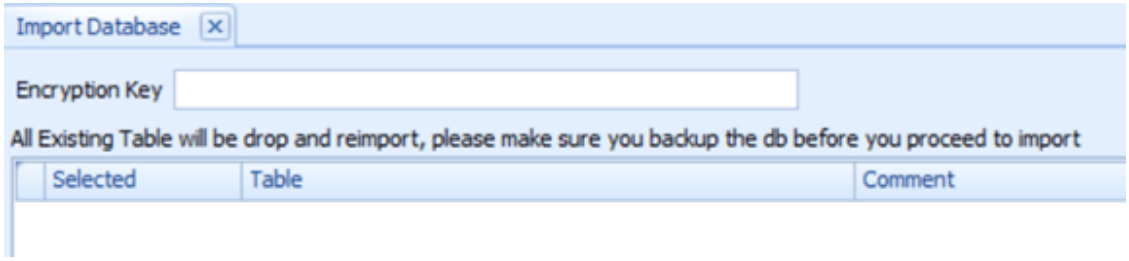
   If Transparent Data Encryption (TDE) applies, the backup file is stored as `DATA_PUMP_DIR` in the Oracle Database directory instead. You are prompted to enter the **DMP Password** and **Filename**.

5. Click **OK** to confirm and close the window.

Import Database

The Import Database function only imports the data table of the dump file exported using the Export Database function.

Figure 14-11 Import Database



1. In the Tools Import/Export tab, select **Import Database** from the ribbon bar.
2. In the Import Database window, enter the **Encryption Key** of the dump file. The encryption key must match the key entered during database export in the Tools application, Export Database function.
3. Click the **Select Dump File** on the ribbon bar and browse the file to import.
4. If the Encryption Key does not match, you are prompted with this message, *"Padding is invalid and cannot be removed. This could mean the encryption key is wrong."*

   If TDE applies, you are prompted to enter the DMP file name and password mentioned in step 4 of Export Database. If the destination database is on another server, copy the DMP file from the source database server to the destination server first before proceeding to step 5.
5. A list of tables populates on the window once the dump file decompresses and is decrypted successfully. This does not apply if TDE is used. Select the table to import.

   The tables that do not exist in the dump file are marked with the comment *"table does not exist in dump file"* in the comment column. The system drops and re-imports all existing tables during this process.
6. Click **Import Database** on the ribbon bar. You are prompted to close all applications before continuing.
7. Click **Yes** to stop the running instance and proceed with the import. During the import routine, the system drops the database tables and re-imports all existing tables.
8. Once import completes, you are prompted with this message:*"Import Database Completed, the log file will be show."*

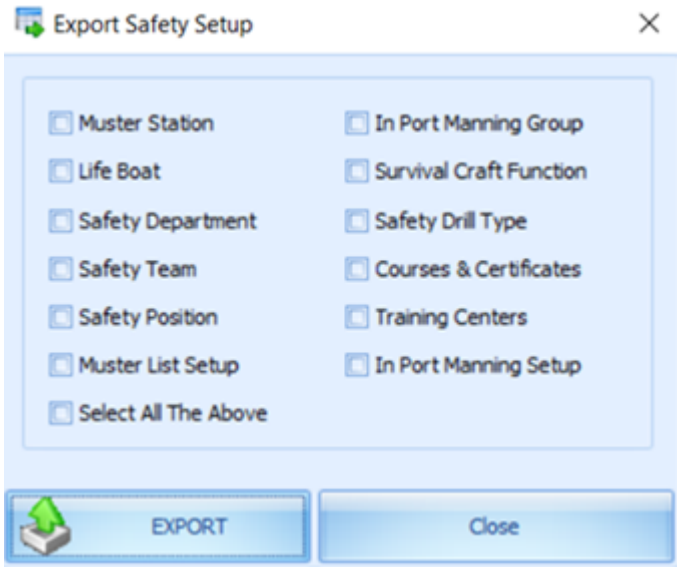
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9. Close the prompt to exit the application.

Export Safety Setup

This function exports all of the Safety setup from one ship to another. We recommend that you to use this tool with the new Muster List, In Port Manning, and Safety Drill setup.

Figure 14-12 Export Safety Setup



1. In the Tools Import/Export tab, select **Export Safety Setup** from the ribbon bar.
2. In Export Safety Setup window, select the desired Safety setup and then click **Export** to export. Files are exported to `C:\Users\Public\Documents\Oracle Hospitality Cruise\SafetySetup_v8.xxx_yyymmdd.xml.'`

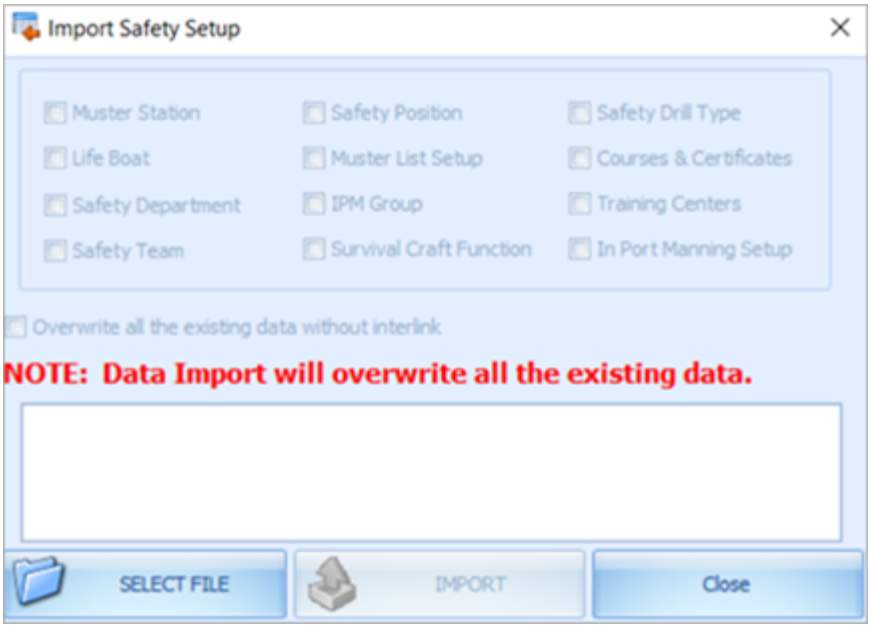
Import Safety Setup

This function is similar to the Import Database function with the exception that it *only* imports Safety Setup that are exported from Export Safety Setup in the Tools application.

1. In the Tools Import/Export tab, select **Import Safety Setup** from the ribbon bar.
2. In the Import Safety Setup window, click **Select File** to browse to the XML file from the Public Document folder.

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Figure 14-13 Import Safety Setup



3. Select **Overwrite all the existing data without interlink** if you wish to overwrite existing data without interlink. The system does not overwrite data that has an inter link to other tables and prompts the following message if inter link data is found *"System notified that there are some inter link tables. System is not going to overwrite existing data. Import Failed."*

   Completed course and certificate (COU) are not imported into database if the record is found in Require Course and Certificate (REQ), Require Substitution Courses (RQS), and Require Course and Certificate for each operation position (RER). The same applies to Muster List setup.

4. Click **Import** and select **Yes** when prompted with *"There are existing data in either of this table (xxx,xxx). Are you sure want to overwrite?"*.

5. At the message prompt *"Import of Safety Setup Completed."*, click **Close** to exit.

Export Package Template

This function duplicates the package plan template from one ship to another.

1. At the Tools Import/Export tab, select **Export Package Template** from the ribbon bar.
2. At the Export Package Template setup, select the **Package Plan Template** to export.
3. Click **Export** and browse the location to save the XML file.
4. Click **OK** when message prompts *"Export of Package Template Completed."*

Import Package Template

This function imports the package plan template exported from the Export Package Template function in the Tools application.

1. In the Tools Import/Export tab, select **Import Package Template** from the ribbon bar.
2. In the Import Package Template window, click **Select File** to browse the XML file.

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3. Select the template you wish to import from the **Selected** column.
4. Click **Import** to begin import.
5. At the message prompt “Some of the template already exists in the DB, do you want to overwrite it?”, click **Yes** to continue, and then click **OK** to close the window.

Import Barcode for Simphony

This function imports the menu item barcode into the Simphony database. It requires a connection to Simphony System setup in **Administration, System Setup, Parameter ‘PROMO’, ‘Micros Server Name = ‘hostname of Simphony database / Simphony’**, and a username. The database password entered uses the Change Password function in the MICROS Password Tools application.

When importing the barcode and the system prompts a message *“The Micros DB is not Simphony or the DB is offline.”*. This is due to the **Simphony, Micros Simphony Property Number** parameter that is used to copy the DB being invalid.

1. At the Tools Import/Export tab, select **Import Barcode for Simphony** from the ribbon bar and select the **revenuer center** under the **Locations** section.
2. Click **Load from CSV file**. Samples in the CSV file format are:
   - Field 1 = menu item object number
   - Field 2 = menu item name (for reference only)
   - Field 3 = barcode
3. You can select to import from **Parent, Property ID** or in **Revenue Center**.
4. When importing from the Parent group, the Child group will follow. However, changes made to the Child group do not affect the Parent record. All new records will not have any status shown in the status column.
5. Click **Import** to proceed, and the system prompts a message *“x record(s) imported, x record (s) failed to imported”* when the import completes. The program only imports valid items and non-duplicated item.

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15

Print Manager

The Print Manager and Board Card Print Manager Interface oversee spooled print jobs originating from the SPMS and third-party applications.

Setting up Print Manager

The Shipboard Property Management System has two Print Manager applications:

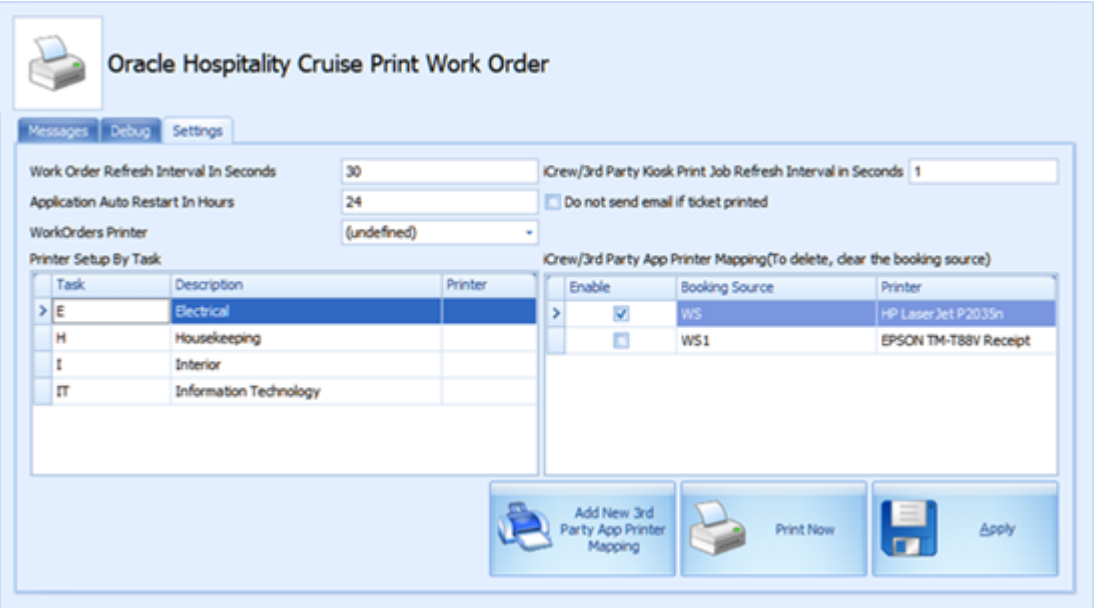
- OHC Print Manager – This application manages the print jobs for Work Orders, Shore Excursion and Tickets.
- OHC Board Card Print Manager – This application manages the Board Card Print jobs.

The usage of the application is controlled by the following parameters.

Table 15-1 Parameters used in Print Manager

PAR Group	PAR Name	PAR Value
Fidelio Cruise	HeartBeat Interval	Default value: 60
General	Do not send alert email if ticket is printed.	Default value: 0
	Enable 3rd Party Kiosk Print Queue	
Excursions	Alert Email address for Web Service booking	Default value: <empty>

Figure 15-1 Print Manager Settings for Work Order



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Configuring Printer for Work Orders

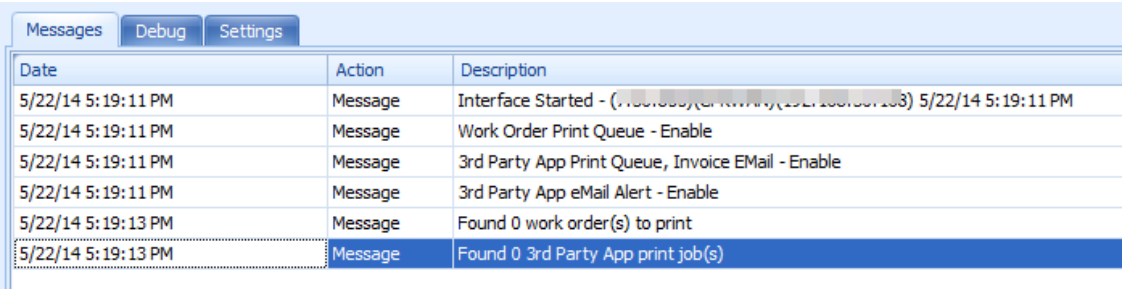
1. Log in to the **Administration** module and select **System Setup, Database Parameters**.
2. At the **Maintenance Parameter** group**,** set the value to one at:
   a. Use Work Order Printer Service.
   b. Print by Task (print the work order by task).
3. Click **OK** to save and exit the application.
4. Launch the **Print Manager** application and navigate to the **Settings** tab.
5. Set the **Interval Seconds** and **Auto Restart In Hours** for the module.
6. At the **Task Type**, select the printer from the list for each task type.
7. Click **Apply** to save.

Configuring Printer for Third-Party Application

By enabling the following parameters, third-party application print jobs are spooled and trigger an email alert once a print job is received. The parameters also update the records in Shore Excursion and Ticket modules. This application works with the printer defined in the Management module.

1. Log in to Print Manager program.
2. At the **Settings tab,** set the print job refresh interval seconds.
3. To disable the email notification once a ticket is printed, select the **Do not send email if ticket printed** checkbox.
4. Click the **Add New 3rd Party App Printer Mapping** button to enable a printer.
5. Select a printer for each type of booking source from the drop-down list.
6. Click **Apply** to save.
7. Restart the interface.
8. If the printer is set up successfully, the action task appears in the **Messages** tab.

Figure 15-2 Print Manager - Messages Tab



The values of the above settings are stored in OHCSettings.par

```
[#Work Order Print Service.PARAM.Restart Interval=24#]
[#Work Order Print Service.PARAM.Refresh Interval=30#]
[#Work Order Print Service.PARAM.Kiosk Refresh Interval=5#]
```


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```
[#Fidelio Cruise.Printer.WorkOrders=PrimoPDF#]
[#FCMaintenanceWork.PrintTask.CARP=#]
[#FCMaintenanceWork.PrintTask.COMM=#]
[#FCMaintenanceWork.PrintTask.DECK=#]
[#FCMaintenanceWork.PrintTask.ELEC=#]
[#FCMaintenanceWork.PrintTask.HOKE=#]
[#FCMaintenanceWork.PrintTask.HVAC=#]
[#FCMaintenanceWork.PrintTask.IT=#]
[#FCMaintenanceWork.PrintTask.LIGH=#]
[#FCMaintenanceWork.PrintTask.N/A=#]
[#FCMaintenanceWork.PrintTask.PLUM=#]
[#FCMaintenanceWork.PrintTask.SAF=#]
[#FCMaintenanceWork.PrintTask.SEC=#]
[#FCMaintenanceWork.PrintTask.TV=#]
[#FCMaintenanceWork.PrintTask.WOT01=#]
[#FCMaintenanceWork.PrintTask.WOT02=#]
```

Configuring Printer for Board Card Printing

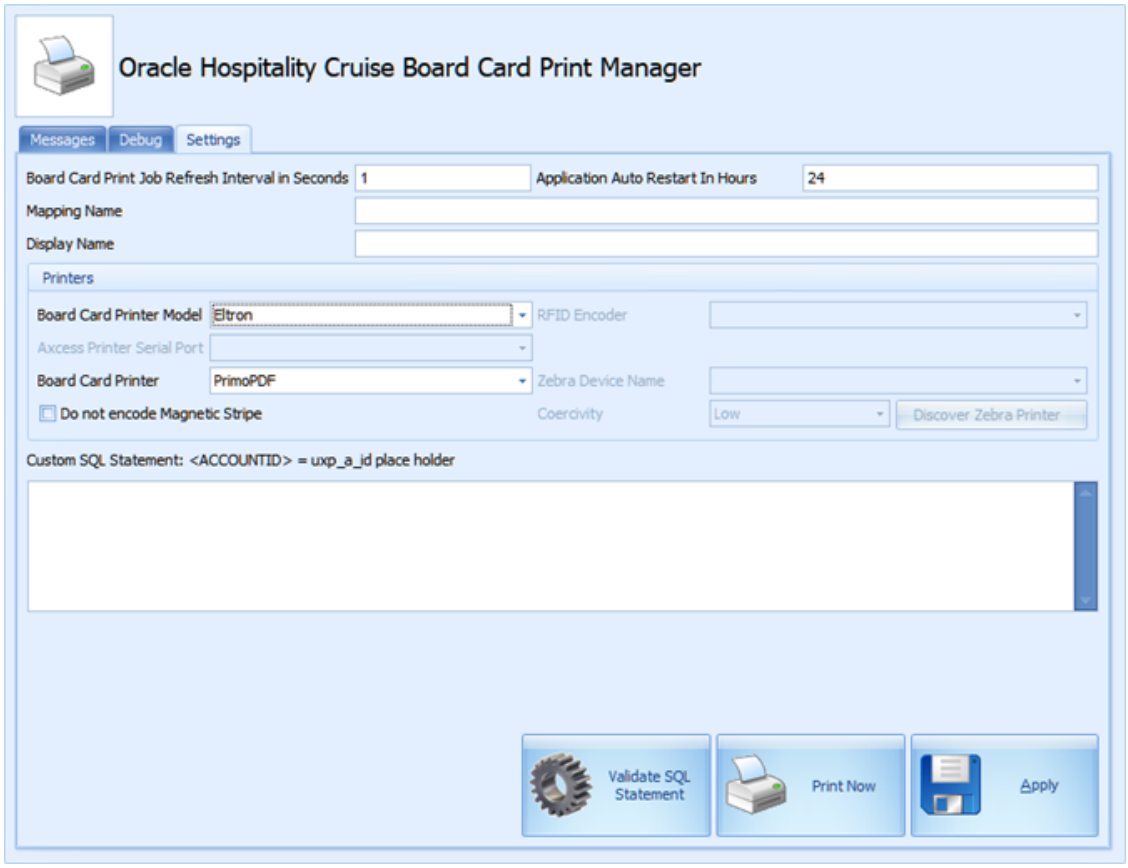
To print a board card, the OHC BoardCard Print Manager is used. This application works with Board Card printers only. It runs in the background and processes print job requests received during check-in.

In the Settings tab of the application, the default **HeartBeat Internal** value is set at 60 seconds. You can change this to meet your operational needs.

1. Log in to the **OHC Board Card Print Manager** application.
2. At the **Settings tab,** enter the **Mapping Name** and **Display Name** for the printer.
3. Set the print job **refresh interval** seconds.
4. Select the **Board Card Printer Model** and **Board Card Printer** from the drop-down list.
5. In the SQL statement section, leave the setting blank to print all card types.
6. Click **Apply** to save.
7. Restart the interface.
8. If the printer is set up successfully, the number of active task appears in the **Messages** tab.

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Figure 15-3 Print Manager Settings for Board Card Printing



The values of the settings entered are stored in OHCSettings.par

```
[#Board Card Print Service.PARAM.Restart Interval=24#]
[#Board Card Print Service.PARAM.Refresh Interval=1#]
[#Fidelio Cruise.Hardware.RFIDEncoder=#]
[#Fidelio Cruise.Printer.BoardCard=2#]
[#Fidelio Cruise.Printer.Cards=PrimoPDF#]
[#Fidelio Cruise.Hardware.Do not encode Magnetic Stripe=True#]
[#Fidelio Cruise.Hardware.Card Reader Port=-1#]
```


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Part V
Reservation Management

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16

DGS Resonline

The DGS ResOnline module serves as a vital interface bridging Fleet Management (FMS) and SPMS. It transfers guest reservation information, encompassing Shore Excursion bookings, Special Requests, Gift orders, and other relevant data, using an Extensible Markup Language (XML) format with predefined mapping fields seamlessly.

Configuring DGS ResOnline

This section describes the configuration of DGS ResOnline Interface.

Setting Up the Parameter

1. Log in to **DGS ResOnline** and navigate to the **Settings** tab.
2. Select the sub-tab and select the relative optional checkboxes.
3. Click **Apply** to save.
4. Restart the application for the changes to take effect.

Setting Up Alert Email List

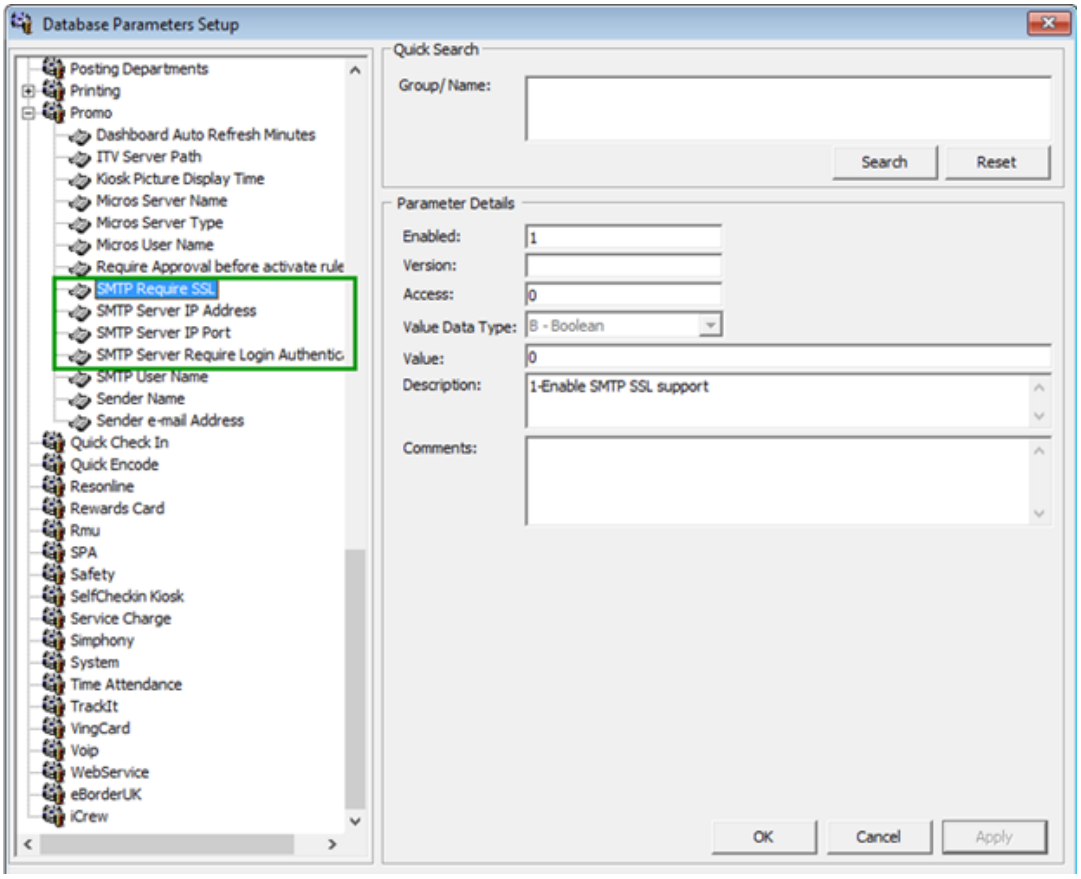
The Alert e-mail List notifies users listed in the alert list of the changes made to the reservation. This requires set ups in the Administration module.

Setting Up Email Server

1. Log in to the **Administration Module** and select **System Setup, Database Parameter** from the drop-down menu.
2. In the Database Parameters Setup window, available parameters are grouped by the function groups. Click the plus**'+'** key to expand the group and select or use the **Quick Search** section to look up parameters. Enter the parameter name *'Promo'* in **Group/Name** field and then click **Search**.

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Figure 16-1 Email Server Parameters



3. Enter the information in the following parameters and click **Apply** at each of the parameter.
   - **SMTP Server IP Address:** Enter the email server IP address.
   - **SMTP Server IP Port:** Enter the email server port. Default port value is 25.
   - **SMTP Server Require Login Authentication:** Set the Value to 1 if it requires login authentication.
   - **SMTP User Name:** Enter a valid email user account for login
   - **SMTP User Password:** Enter the password for the email user account
4. Exit the program when the update is completed.

Inserting Email Alert Report Template Script

The email alert uses a report template to send the alert. The templates are uploaded using an SQL script.

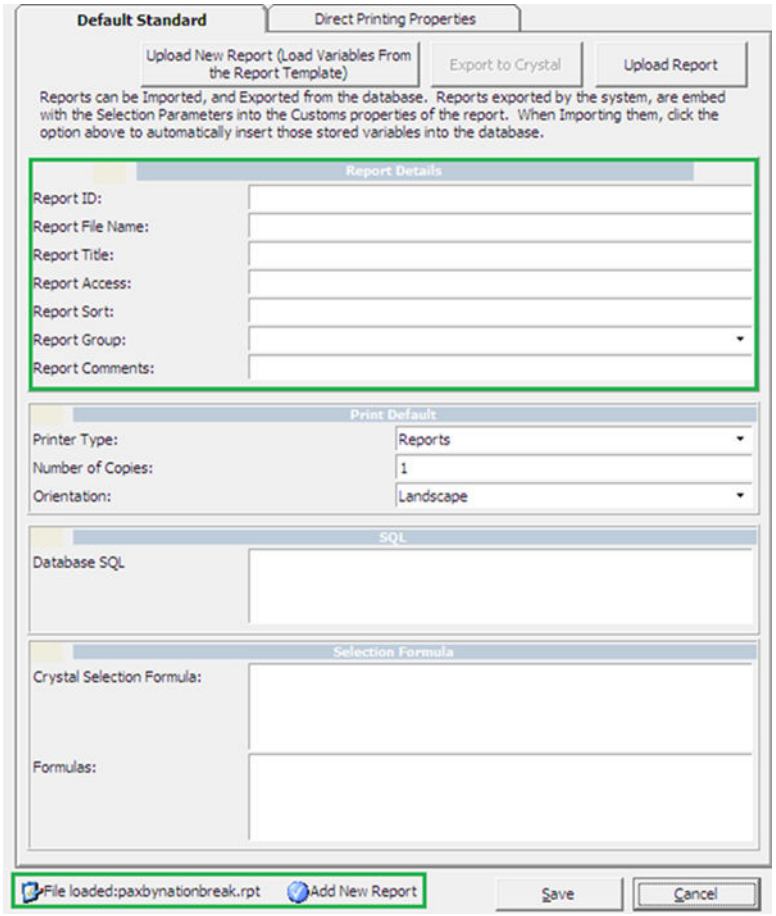
1. Open the Command Prompt with **Run as Administrator**
2. At the command line, type SQLPLUS and then press the **Enter** key.
3. Enter the SQL System user name and password.
4. At the SQL command-line, enter the following command @**"<file location + file name>"**. For example `@"C:\temp\ResOnline Email Alert.sql"`.
5. Press the **Enter** key to execute the script, and close the SQL command and the Command Prompt.

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Uploading Email Alert Report Template

1. Log in to **Administration** module and select **System Setup, Report Setup** from the drop-down menu.
2. At the Current Reports List, ResOnline group, right-click, and select **Add Report**.
3. Navigate to select **Upload New Report (Load Variables From the Report Template)** or **Upload Report** and then search for the .RPT file on your local drive, if you are uploading a report template.
4. In the **Report Details** section, enter the following:
   a. **Report ID:** Unique ID of customized report.
   b. **Report File Name:** Crystal Report file name, for example, testreport.rpt.
   c. **Report Title:** Report name to show in Current Report List.
   d. **Report Access:** User Access allowed to view/print the 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 menu.
   g. **Report Comments:** Additional comments/information pertaining to this report.

Figure 16-2 Report Setup Details



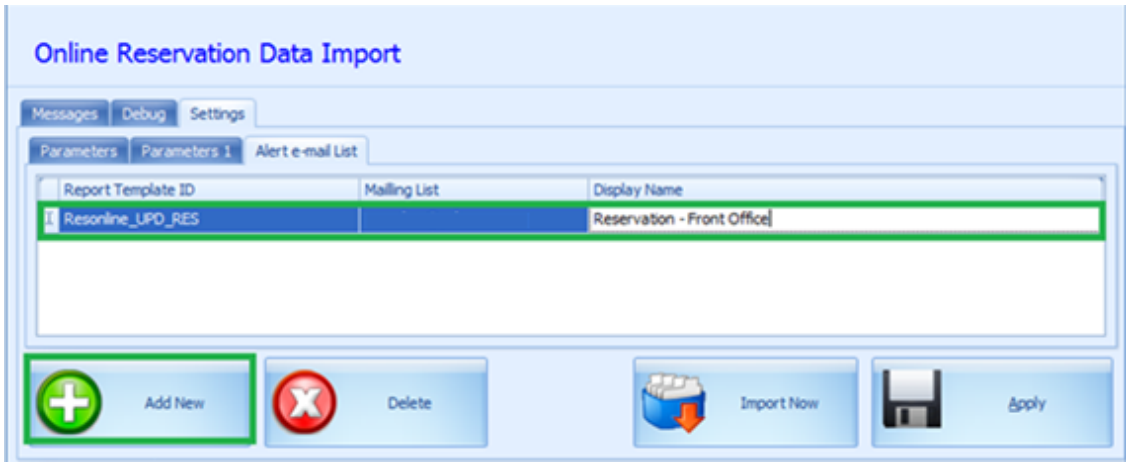
5. At the **Print Default** section, select the printer type and print orientation from the drop-down list, and then enter the number of copies to print.

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6. Click **Save** to add the report to the list, and click **OK** at the Save New Report prompt. The newly loaded report template appears.

Setting Up Email Alert List

Figure 16-3 Email Alert Report Linking



1. Log in to DGS ResOnline and go to the **Settings, Alert e-Mail List** tab.
2. Click the **Add New** button to insert a report entry.
3. Insert the **Report ID** from report setup into **Report Template ID** and add the **Mailing List** and **Display Name** in the grid. Use a semicolon ";" to separate multiple email address, if any.
4. Click the **Apply** button to save the changes.
5. Repeat the steps above to add more report alerts for other department. The Alert E-Mail Template settings are saved to `AlertEMail.xml` in the Public Documents folder `C:\Users\Public\Documents\Oracle Hospitality Cruise`.
6. The Alert e-Mail sent is based on the parameter stored in OHCSettings.par `[#Res Online Data Import.Parameter.LastSendRspID=xxxxxx#]` that references the ID of the last sent alerts.
7. Copy the **OHCSettings.par** from the Oracle Hospitality Cruise folder of the ResOnline Interface PC to the new PC that you intend to run the DGS ResOnline application. If the `[#Res Online Data Import.Parameter.LastSendRspID=xxxxxx#]` on the next PC is reset or starts from zero, the application then resend all previously sent alert.

Setting Up Email Alert Mapping Field

Besides configuring the e-Mail server and adding the user email accounts to the alert list, you are also required to define the trigger fields for alerts in the ResOnline Viewer. See ResOnline Viewer User Guide- Configuring a View with Field Mappings section for details.

Setting Up Pre-Posting Quantity to Unit Price

This parameter enables the display of imported prepaid posting amounts to be shown as unit price x quantity in the guest invoice. To use this parameter, an additional setting in Administration module is required, and the **Multiply Pre-Posting Quantity to Unit Price** is checked in to DGS ResOnline.

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1. Log in to the **Administration Module** and select **System Setup, Database Parameter** from the drop-down menu.
2. In the Database Parameters Setup window, available parameters are grouped by function group. Click the plus **(+)** key to expand the group and select, or enter the parameter name *'General'* in the **Group/Name** field and then click the**Search** button.
3. Select the **Default Prepaid System Account** and insert the credit department code in the value field. The credit department code must start with an "S". For example: S9185 for Prepaid account.
4. Click the **Apply** button to save the changes.

Enabling 'Log Changes into chglog'

If the change log parameter is checked in DGS ResOnline, you must define the change log trigger fields in OHC Tools.exe. See *Tools User Guide* to set up the mapping fields.

DGS Prioritization

The application supports prioritization of data to import by record sequence of a bigger value first and then the null value last. The sequence value here refers to the XML file where 'RESERVATION_MSGS > PRIORITY_VALUE'.

Enabling Multi Thread Process

The DGS ResOnline Multi Thread Process is an enhanced feature that manages performance. Below are the setup steps.

Setting Up OHCSettings.Par

In addition to setting the parameters in DGS ResOnline application, additional parameters are added to further manage the performance process. You must manually insert these settings at the beginning of the OHCSettings.Par file.

Table 16-1 OHCSettings.Par

Parameter	Description
[#Res Online Data Import.Parameter.LogLevel=3#]	• Define the type of information to show on screen as well as in DGS log file. 0: No logs. Does not log in into the database at application tier as well as database tier and nothing appears in UI. 1: Error on critical information only 2: Critical and important information - error and processing status only. 3: All information
[#Res Online Data Import.Parameter.ThreadCount=4#]	• Define the number of threads to process DGS records
[#Res Online Data Import.Parameter.MemoryLimit=1000000#]	• Define the memory usage limit and value is in Kilobyte; • The default value is 1000000 if parameter does not exist in OHCSettings.par. • The minimum value is 500000.

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Table 16-1 (Cont.) OHCSettings.Par

Parameter	Description
[#Res Online Data Import.Parameter.LogCommitCount=100#]	• Define the log commit count allowed. • Default is 100 if parameter does not exist in OHCSettings.par. • The minimum value is 100. • The bigger the value, the faster the commit process, but performance is slower and uses less memory.

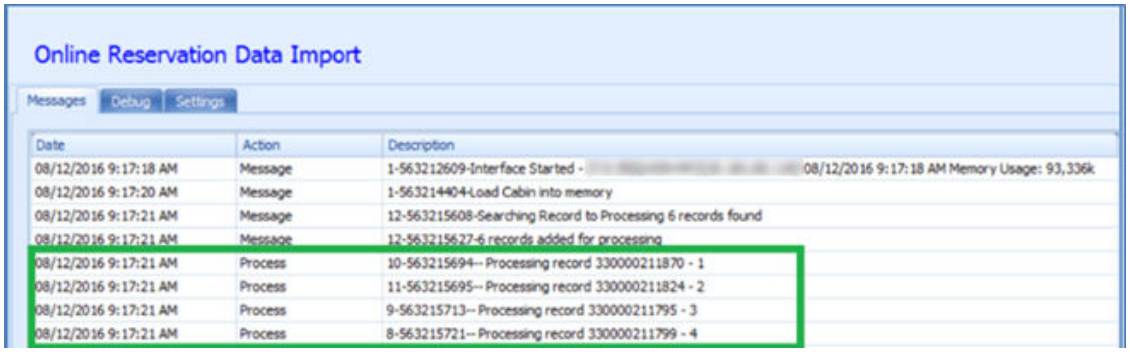
Validating the Parameter Value

Based on the value defined in the above parameters, result returned by the system are shown in the following example:

ThreadCount = 4

Under the **Action and Description** column, records in process are shown in thread No 8, 9, 10 and 11 per the number of threads indicated.

Figure 16-4 Process Record Thread



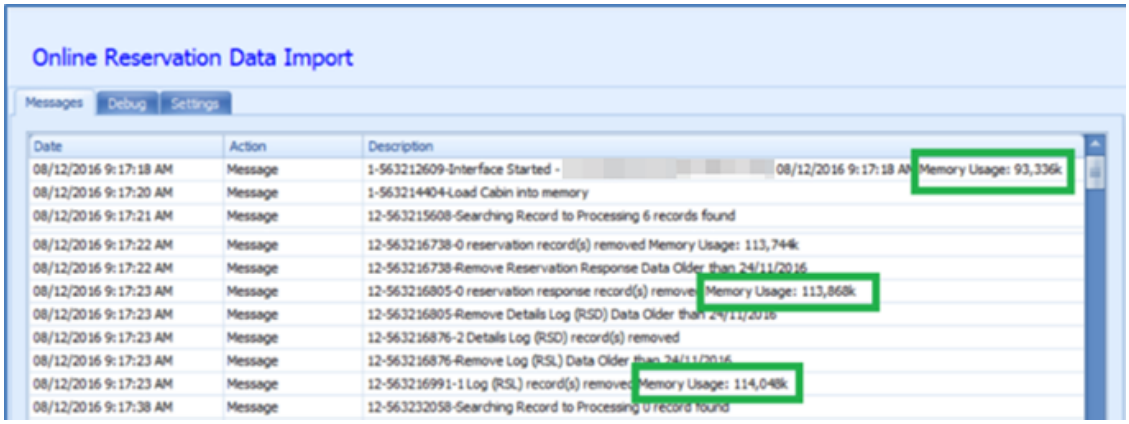
Memory Limit

The DGS program is coded to restart with a 500MB memory, and when the default memory limit in the parameter is 1000000. The application restarts automatically when the memory reaches 1.5GB, or at value defined (500MB + limit defined). For example, if the defined memory limit is 500000, the application restarts when memory reaches 1.0GB.

The total memory used is also shown in the description column of the figure below:

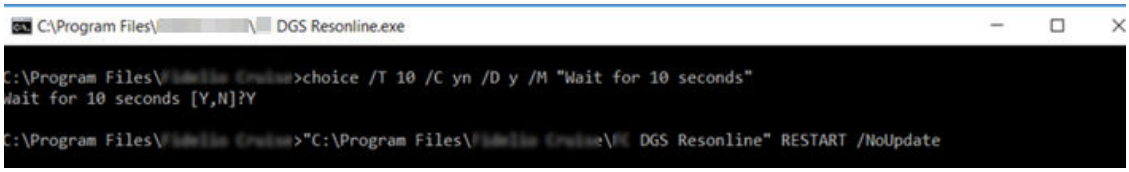
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Figure 16-5 Utilization Memory Limit



The system launches a Command Prompt window when the application restarts and closes the window after the application restart completes.

Figure 16-6 Program Restart Prompt



Process Log

In the Message tab, only the runtime errors are shown. All other log entries are viewable from `C:\Program Files (x86)\Oracle Hospitality Cruise\ResOnlineDataImport_yyyymmdd.txt`.

Processing Data Import

The interface synchronizes data automatically based on the refresh intervals specified in the parameter setting. However, there may be occasions when you need to manually import the data, and the steps are described in the section below. Data is imported using an XML format, based on the mapping fields defined in the mapping table. Contact Oracle Customer Support to obtain a copy of the mapping table.

Importing Data

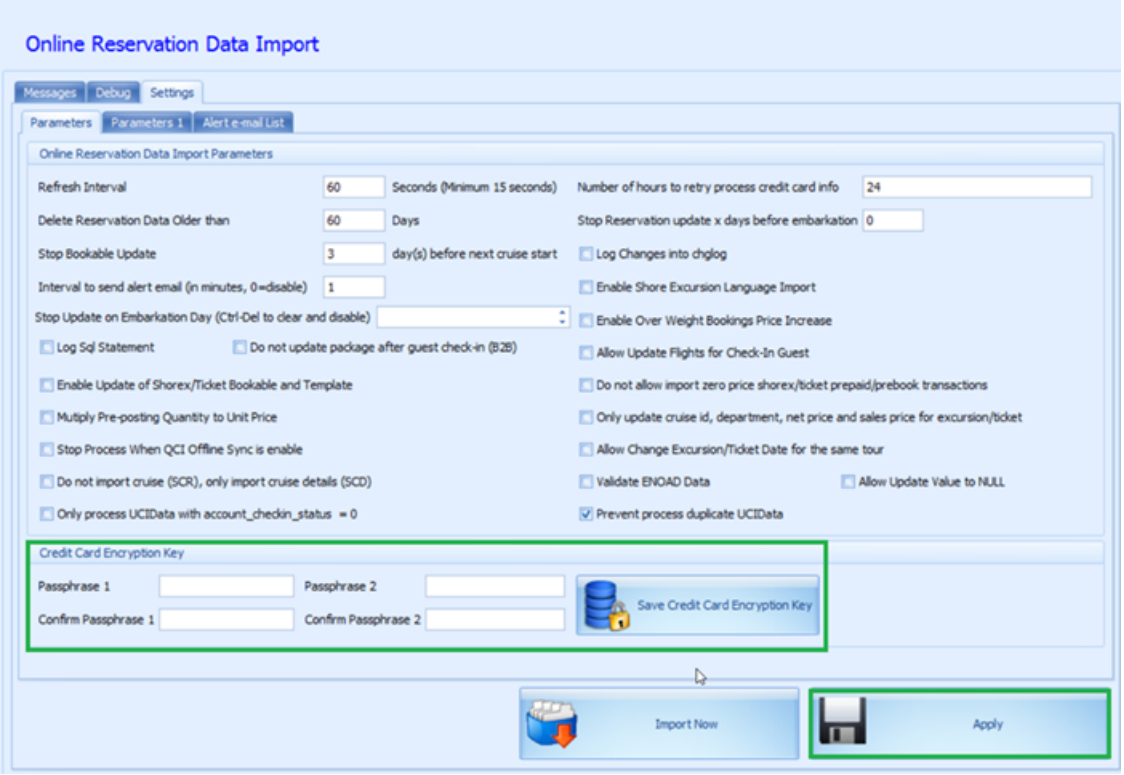
1. Run DGS ResOnline.
2. Update the **parameters** in the **Settings, Parameter** tab if any, and restart the application.
3. Click the **Import** button to process the manual data import.
4. Go to the **Messages** tab to view the number of records processed or any other transactions, updates that took place, depending on the parameters defined.

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Changing Credit Card Encryption Key During Import

The system uses the default SPMS encryption key entered in the Credit Card Encryption Key section if the field is left blank during import.

Figure 16-7 Credit Card Encryption Key Setup



To update the encryption key with a new passphrase:

1. Go to **Settings, Parameters 1** tab and then Credit Card Encryption Key section.
2. Enter the new passphrase in **Passphrase1** and **Passphrase2** fields.
3. Re-enter the same passphrase in **Confirm Passphrase 1 and 2** fields, then click **Save Credit Card Encryption Key**.

Sample Process Messages

Below are some of the process messages based on the parameters defined.

Sample XML File Format

Below is the sample information of the XML file.

```
<DataSetReservations>
  <MESSAGE__TYPE>
    <MSSG_CONTENT></MSSG_CONTENT>
    <MSSG_XFRSHIP></MSSG_XFRSHIP>
    <RESERVATION>
      <RESERVATION_RCDID></RESERVATION_RCDID>
```

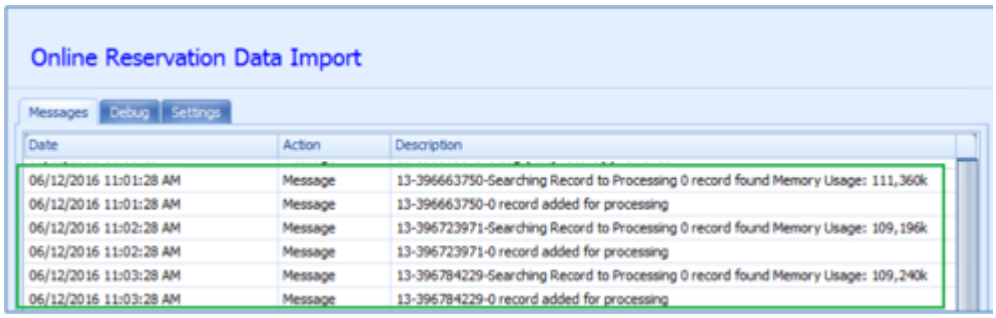

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```
    <RESERVATION_XFRSHIP></RESERVATION_XFRSHIP>
    <RESERVATION_XFRSTATUS></RESERVATION_XFRSTATUS>
    <RESERVATION_RCDMODDATE></RESERVATION_RCDMODDATE>
    <RESERVATION_RES_ID></RESERVATION_RES_ID>
    <RESERVATION_PAX_GUID></RESERVATION_PAX_GUID>
    <RESERVATION_TYPE></RESERVATION_TYPE>
    <RESERVATION_CABIN></RESERVATION_CABIN>
    <RESERVATION_CABIN_SHARING></RESERVATION_CABIN_SHARING>
    <RESERVATION_STATUS></RESERVATION_STATUS>
    <RESERVATION_EMBARK></RESERVATION_EMBARK>
    <RESERVATION_DEBARK></RESERVATION_DEBARK>
    <RESERVATION_BOOKINGNO1></RESERVATION_BOOKINGNO1>
    <RESERVATION_BOOKINGCODE></RESERVATION_BOOKINGCODE>
    <RESERVATION_BOOKINGDATE></RESERVATION_BOOKINGDATE>
    <RESERVATION_V_GUESTID></RESERVATION_V_GUESTID>
    <RESERVATION_VIP></RESERVATION_VIP>
    <RESERVATION_GROUP_ID></RESERVATION_GROUP_ID>
    <RESERVATION_ACATEGORY></RESERVATION_ACATEGORY>
    <RESERVATION_PCATEGORY></RESERVATION_PCATEGORY>
    <RESERVATION_PRODUCT></RESERVATION_PRODUCT>
    <RESERVATION_PREPRODUCT></RESERVATION_PREPRODUCT>
    <RESERVATION_CRUISE_FARE></RESERVATION_CRUISE_FARE>
    <RESERVATION_TRAVEL_TYPE></RESERVATION_TRAVEL_TYPE>
    <RESERVATION_PPD_TAG></RESERVATION_PPD_TAG>
    <RESERVATION_OPERATOR></RESERVATION_OPERATOR>
    <RESERVATION_AGENTID></RESERVATION_AGENTID>
    <RESERVATION_CREDITLIMIT></RESERVATION_CREDITLIMIT>
  <RESERVATION_EMBARKPORTCODE></RESERVATION_EMBARKPORTCODE>
  <RESERVATION_DEBARKPORTCODE></RESERVATION_DEBARKPORTCODE>
```

Refresh Interval

Figure 5–1 below shows the system constantly checks for new records to process every 60 seconds or per a defined interval time.

Figure 16-8 Sample Refresh Interval Messages

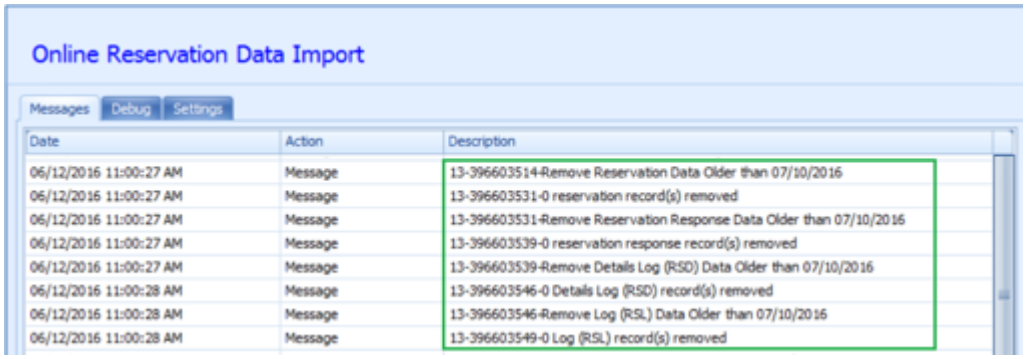


Delete reservation data older than 60 Days

In the **Messages** tab, data older than 60 days from the date of modification is removed.

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Figure 16-9 Sample Deleted Reservation Message



Stop update on embarkation day

A message *"Update Disable for current embarkation date after x:xx:xx"* is added to the ResOnline Data Import log file, when the **Stop Update** on Embarkation parameter is enabled or when a value is inserted into the field.

Figure 16-10 Sample Stop update on embarkation day message



Log SQL statement

The system logs an SQL statement into a log file in `C:\Users\Public\Documents\Oracle Hospitality Cruise\ResOnlineDataImportYYYYMMDD.txt` if you have the Log SQL Statement checked in Parameter1. You can view the statement from the **Debug** tab.

Do not update package after guest check-in (B2B)

This parameter updates the booking records based on the selection of the checkbox.as described in the following:

- If the checkbox is selected and the guest with back to back booking has checked in:
  - It does not process or update the package plan be it new or of the same plan.
- If the checkbox is deselected and the guest with back to back booking has checked in:
  - It processes and creates a new package plan when new plan is send in and prompts 'No Changes' if the plan is the same as previous and without changes.
- If the checkbox is selected/deselected for back to back booking due to arrive:
  - It creates a new package plan when a new plan is sent in and prompts 'No Changes' if the plan is the same as previous and without changes.

Stop process when QCI Offline Sync is enabled

This parameter backs up and restores the latest database to the QCI Shore Database when the parameter is enabled and the QCI Sync Interface is started.

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At the point when Quick Check In Synchronizer Ship database mode is in an **Enabled** status in **Offline Mode**, the DGS ResOnline Interface status switches to a **Pause** and resumes when the **Offline Mode** is **Disabled**.

Figure 16-11 QCI Synchronization Status

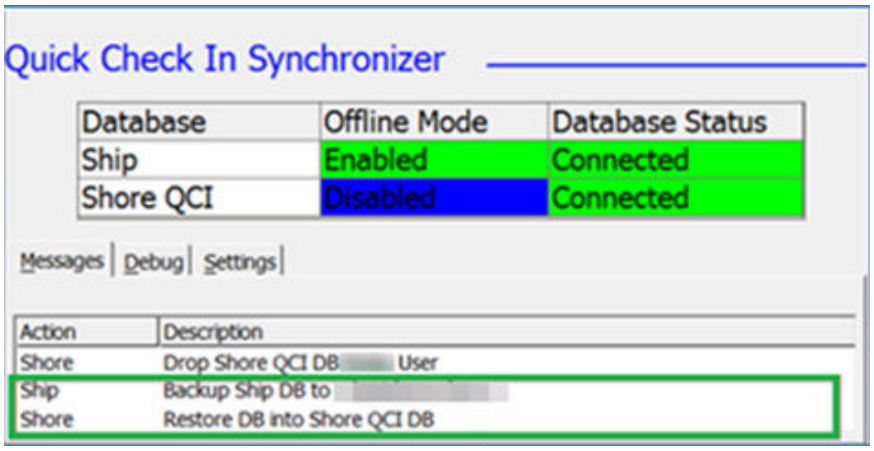
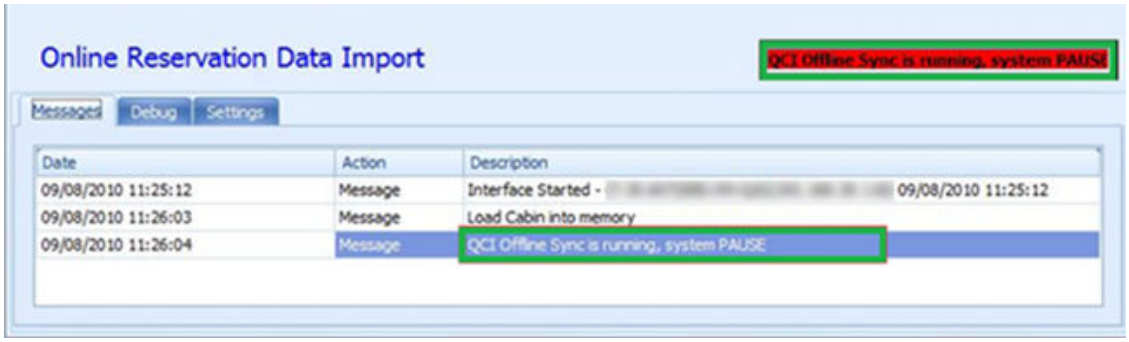


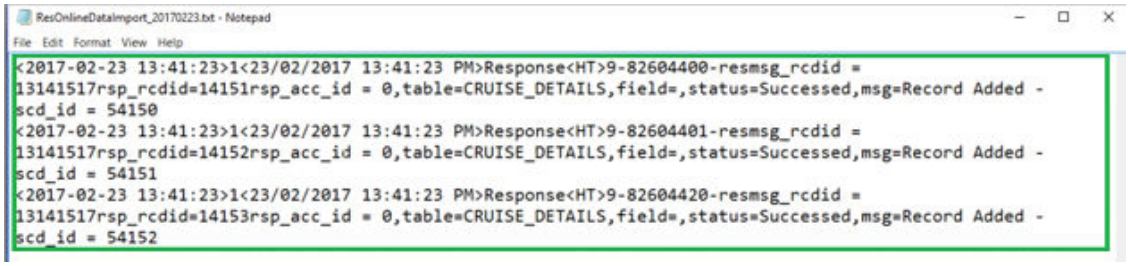
Figure 16-12 DGS Pause Mode



Do not import cruise (SCR), only import cruise details (SCD)

When this parameter is enabled, the system only imports the cruise details excluding the cruise date.

Figure 16-13 Sample Do Not Import Cruise Details Messages

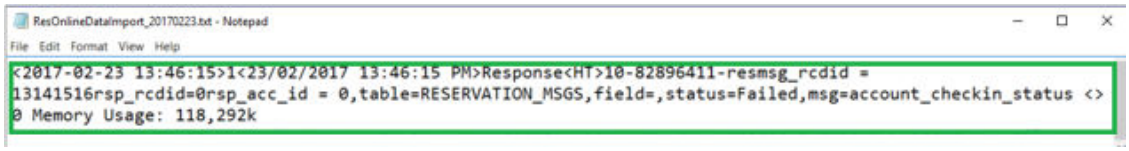


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Only process UCIData with account check in status = 0

Below is the sample message of UCIData when the parameter value of 'Only Process UCIData With Account Check In Status' is set to 0 and the option is checked in the application.

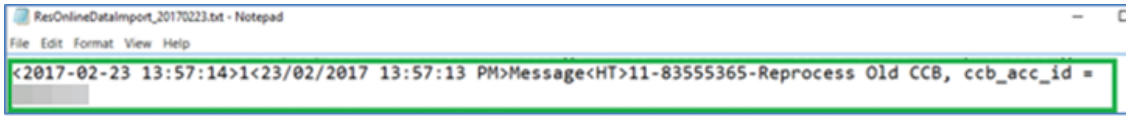
Figure 16-14 Sample Message of Only Process UCIData With Account Check In Status



Number of hours to retry process credit card info

If this parameter is enabled and the Pretty Good Privacy (PGP) Credit number fails to decrypt during the import process, the application will retry to process with the credit card information stored in the credit card buffer based on the hours defined in the parameter.

Figure 16-15 Sample Retry Processing Credit Card Info Messages

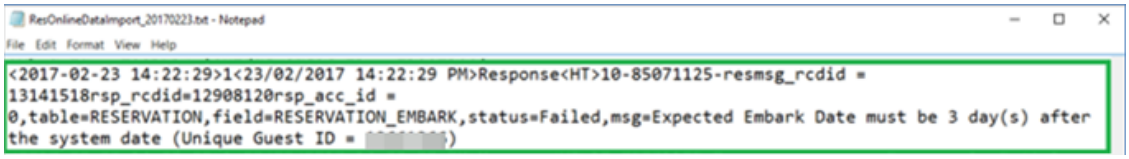


Stop Reservation Update x Days Before Embarkation

This parameter stops the import of reservation updates based on the number of days defined in the parameter and logs a fail message, 'Expected Embark date must be x day(s) after the system date.'

For example, the number of days defined before embarkation is three and record with embark date less than or equal to three days after the system date are not imported

Figure 16-16 Sample mMessage on Stop Reservation Update x Days Before Embarkation



Enable Shore Excursion Language Import

This parameter allows import of excursion booking by Language to prevent the overbooking of tour buses/guide. It applies to the same bookable tour with a different language (ESE_LANGUAGE) and with same external ID (ESE_EXTERNAL_ID)

When this parameter is enabled, the application performs:

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1. A search based on ESE_EXTERNAL_ID + ESE_DATE.
2. If the search returns no record, then the application searches the next record using the ESE_DATE + ESE_NO.
3. If no result is yielded, the application reject the import and inserts an error, “tour code is not found” in the record.
4. If the search returns a record, then the tour code is inserted into the excursion booking table (EPO), regardless of the language set in ESE_LANGUAGES field.
5. If the search returns more than one record, then the application checks and matches the language in <EXCURSIONS_LANGUAGE> set during import.
6. If no match is found, the application then searches the Account_Languages.
7. If it still does not return a matching result, the program then inserts the booking into the first bookable excursion.

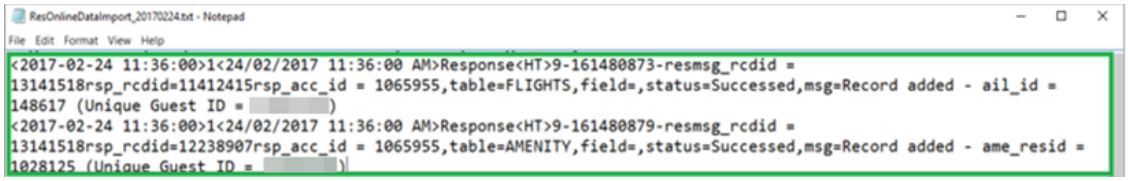
Enable Over Weight Bookings Price Increase

This parameter triggers a price increase based on the value set up in **Shore Excursion, Overweight Price Increase** (either in Value or Percentage). When the import is processing, the system updates the price Gross Price in Shore Excursion. The price increase is based on the EXCURSION_EXTRA_SEAT value set to “W” in the XML file.

Allow Update Flights for Check-In Guest

This parameter disables users from adding, deleting or editing the flight information in the **Management and Crew, Flight Information** function, and sets it to view only. When the parameter is checked, importing of flight information including checked-in guest is allowed.

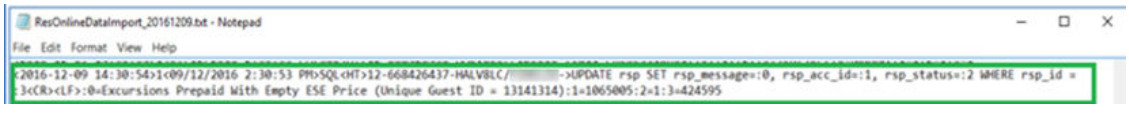
Figure 16-17 Sample Allow Update Flights for Check-In Guest



Do not allow Import Zero Price Shorex/Ticket Prepaid/Prebook Transactions

When this parameter is checked, the system checks for prepaid records that have an empty price in the XML file, and rejects the import and then sets status=Fail.

Figure 16-18 Sample messages Do Not Allow Import Zero Price From Shorex/Ticket Prepaid/Prebook Transactions

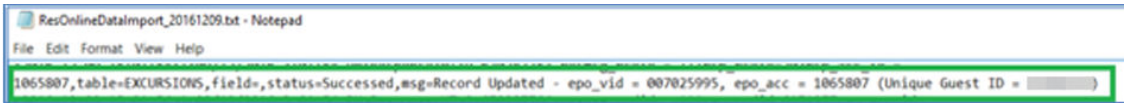


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Only Update Cruise ID, Department, Net Price and Sales Price For Excursion/Ticket

The system only updates the cruise ID, department, net price, and sales price for excursion when the parameter is selected, and no other changes shall take place. The example below shows the price value has been updated.

Figure 16-19 Sample message of Update Cruise ID, Department ID, Net Price



Allow Change Excursion/Ticket Date for the same tour

When this parameter is turned on and a date change is made to the same excursion, the system does not create a new booking but update the excursion date with new date sent by the interface.

When the data is sent with the same `EPO_VID, ESE_ID=EPO_ESE_ID` with different booking date, the `EPO_ESE_ID and EPO_SDAT` the updated the same record.

Figure 16-20 Sample message of Allow Change Excursion/Ticket Date



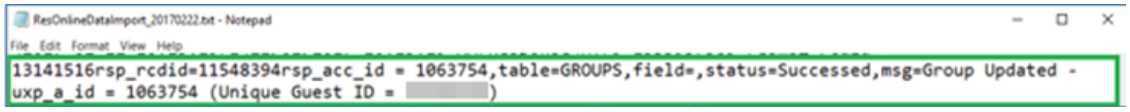
Validate ENOAD Data

This parameter validates ENOAD data during import and inserts an import warning if the ENOAD data is found to be missing. You can view the data validation warning from ResOnline Viewer.exe under Import Warning

Allow Update Value to Null

This parameter updates the existing data to null, excluding fields that do not allow null.

Figure 16-21 Sample message of Allow Update Value To Null

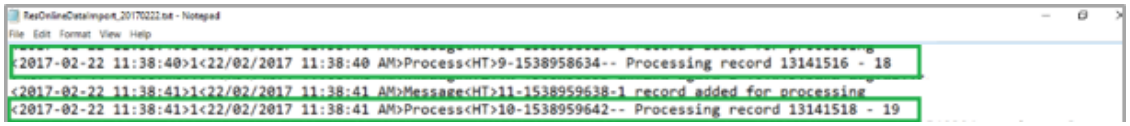


Prevent Process Duplicate UCIData

When this parameter is enabled, the system processes the latest UCIData records and ignore the earlier records if multiple records were sent for the same guest. If the parameter is disabled, the system processes all records for the same guest.

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Figure 16-22 Sample message of Disabled Prevent Process Duplicate UCIData



Allow Field Update for B2B Guest > Embarkation Date

This parameter updates the disembarkation date according to the XML file for guest with back to back bookings that are checked-in. When the expected disembarkation date of the checked-in guest in the XML file is greater than current cruise end date, the system creates the second record. You can view the details of the imported messages with the ResOnline Viewer

Interval to Send Alert e-Mail

This parameter triggers an alert e-mail to the the user based on the Alert e-Mail list defined in Setting Up Alert Email List. If the system finds a record that matches the settings during an import process, a report is generated and sent to the respective user. A message also appears in the Message tab with *"xxxxxx Generating Report-ShorexAlertEmail*", followed by *"xxxxxx Sending eMail to Shorex Booking (xxxx)"*

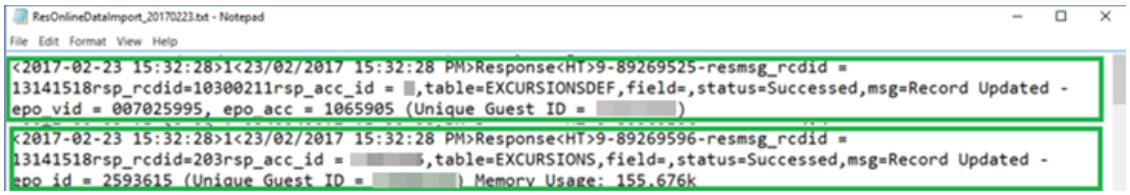
Enable Update of Shorex/Ticket Bookable and Template

This parameter checks and updates the bookable records x days before the next cruise. For example a price change from 300 to 150 is set in Shore Excursion. During import, the application checks the date to Stop Bookable Update, and updates the price accordingly to the future cruises, where applicable.

This change is reflected in the **Shore Excursion, Pricing & Sales** tab.

This change also affects the shore excursion bookable and template, and is only applicable to a future cruise. You cannot change the current cruise shore excursion bookable and template.

Figure 16-23 Sample Price Update on Shore Excursion, Ticket Bookable and Template



Additional Information

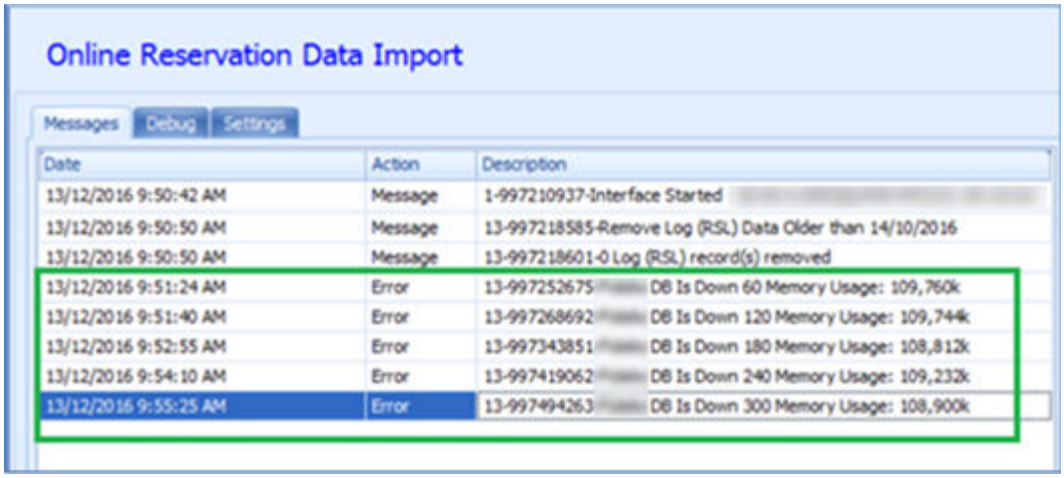
The following section describes some functional features that run in the background.

Connection Lost Retry 10 Times

When a connection is lost, the interface attempts to reconnect and display an error message *'Error – DB is down'* in ResOnline Message tab after the 10th retries.

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Figure 16-24 Sample message of Lost Connection Retry



Assuming the Refresh Interval is set at 60 seconds and the DB down time hits 300, this closes the application.

The application prompts a command prompt screen when it restarts and closes the command prompt screen after the application restarts completely.

Prevent Application from Running Multiple Times from Different PC

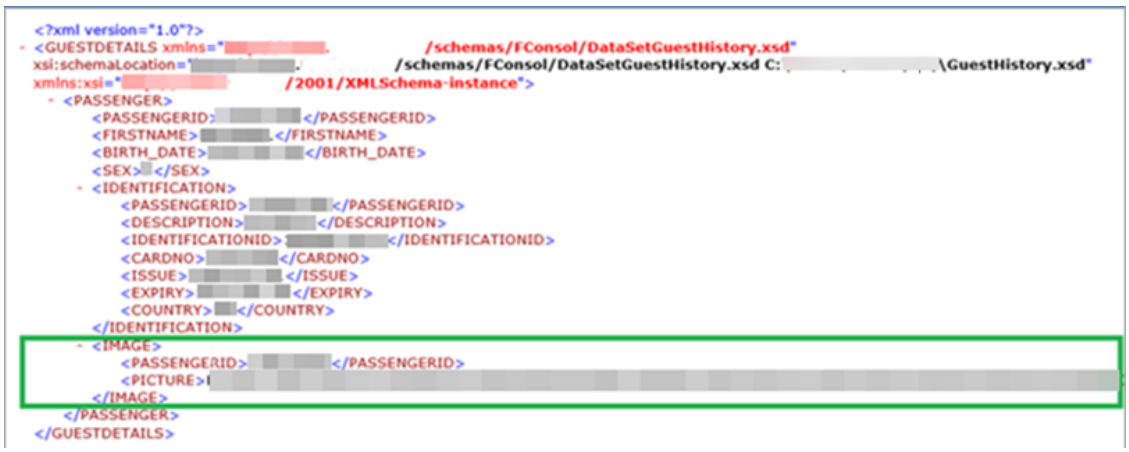
This handling is added to prevent the application from being started at multiple locations. It prompts a message on screen when the application is started from another location. An allowance of 60 seconds is added before the application can be closes.

The system adds an ‘Error’ entry to the Message tab with date and time stamped, and the location mentioned in the Description section. For example, *“xxxxxxxx DGS ResOnline.exe is running at workstation xxxxxx”*

Guest Picture Import

The application supports importing a guest picture from an XML file, inserting the value into the `MSSG_GUEST_HISTORY` field, and stores the picture in the `SEC` table. The picture cannot be updated after the guest checks-in.

Figure 16-25 Sample picture string in XML file format



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Import Guest History

The application supports importing guest history for analysis purpose and this includes transactions, item details, shore excursion booking, amenities, and special requests.

When the XML content is uploaded and updates the `RESERVATION_MSGS.MSSG_CONTENT` and `RESERVATION_MSGS.MSSG_GUEST_HISTORY` of the guest, the history value and request are shown in **Management, Guest Handling, Guest History tab** and **Service Info tab** respectively. The service request can be copied into the current cruise. See *Management User Guide* on how to copy the service request.

Insert EST_LANGUAGES to ESE_LANGUAGES

When the `ESE_LANGUAGES` is empty during import, the application replaces the value into this field when `EST_NO=ESE_NO`.

ResOnline Viewer Application

The ResOnline Viewer application allows you to view the guest information, bookings, gift orders, special request, and much more information transferred from the Fleet Management System (FMS) through the DGS ResOnline Interface.

By using the ResOnline system, the IT Officers no longer receive or upload manifests into the system manually. Data from the shore-side reservation system such as guest information, shore excursion bookings, gift orders, and special requests are automatically transferred to the ship's SPMS system before the voyage begins on a daily basis, allowing users to view all reservations changes.

ResOnline Viewer Functions

The functions available in the ResOnline Viewer application are:

Table 16-2 ResOnline Viewer Functions

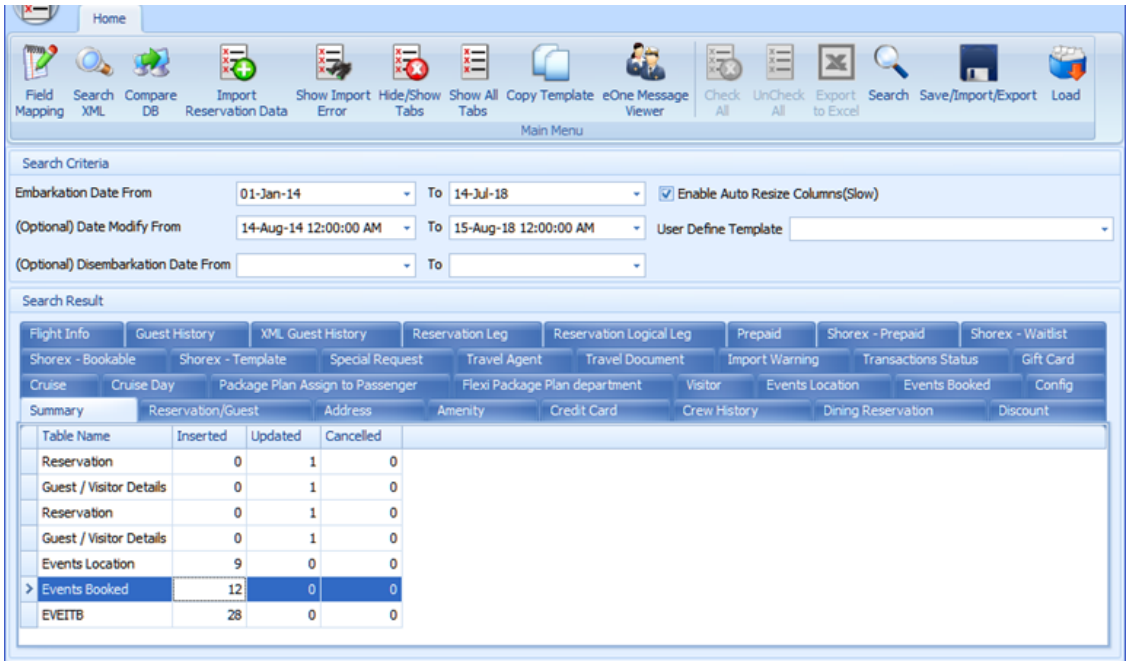
Function	Description
Field Mapping	A selection of fields to display on each available tabs.
Search XML	A function that searches the eXtensible Markup Language (XML) reservation records.
Compare DB	A function that compares two databases.
Import Reservation Data	A function to import reservation data in XML format.
Show Import Error	A function that displays DGS ResOnline data import error.
Hide/Show Tab	A function that hide/show user selected tabs.
Show All Tab	A function that show all available tabs in the system.
Copy Template	A function to copy bookable Tour template to bookable tour date
eOne	A function to show the eOne data process
Search Function	A function that search the database based on selected criteria.

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Table 16-2 (Cont.) ResOnline Viewer Functions

Function	Description
Save/Import/Export	Save/Import/Export User Defined template.
Load	A function that refreshes the screen according to selected template view.

Figure 16-26 ResOnline Viewer Functions



Search Criteria

Information shown in each of the ResOnline Viewer tabs is based on the information entered in the search criteria.

- Embarkation Date From / To
- Date Modify From /To (optional)
- Disembarkation Date From / To (optional)
- User Define Template, if you wish to load information based on previously saved template.

Information Tab

Below are the default tabs provided by the application. You can hide or show the tabs to suits the operations.

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Table 16-3 Default ResOnline Viewer Tabs

Tab Name	Description
Summary	Displays a summary of changes made on each tab, for example; number of records inserted, updated, or deleted.
Reservation/Guest	Displays reservation information and the changes made.
Address	Displays address information and the changes made.
Amenity	Displays the gift order information table and the changes made.
Credit Card	Displays the credit card information and the changes made.
Crew History	Displays the crew history information and the changes made.
Dining Reservation	Displays the dining information and the changes made.
Discount	Displays the discounts accorded and the changes made.
Flight Info	Displays the flight information and the changes made.
Guest History	Displays the guest history information and the changes made.
XML Guest History	Displays the reservation information and the changes made in XML format.
Reservation Leg	Displays the reservation information for back to back reservations and the changes made.
Reservation Logical Leg	Displays overland/overnight tour information for back to back reservations and the changes made.
Prepaid	Displays the pre-postings information and the changes made, including promo credit, shipboard credit, gift order credit.
Shorex – Prepaid	Displays the web booking information for shore excursion and changes made.
Shorex – Waitlist	Displays the waitlisted shore excursions booking information and changes made.
Shorex – Bookable	Displays the bookable shore excursions information and changes made.
Shorex – Template	Displays the shore excursions template information and changes made
Special Request	Displays the special services and request information's, and the changes made.
Travel Agent	Displays the travel agency information and changes made.
Travel Document	Displays the travel documents information and changes made.
Import Warning	Displays the records with warning messages prompt during import.

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Table 16-3 (Cont.) Default ResOnline Viewer Tabs

Tab Name	Description
Transaction Status	Displays the status of the records transferred.
Gift Card	Displays the gift card information and changes made.
System Cruise	Displays cruise information and changes made.
Cruise Day	Displays cruise day information and changes made.
Package Plan Assign to Passenger	Displays Passenger package plan and the changes made.
Flexi Package Plan Department	Displays Flexi Package Plan charge department, discounts value and changes made.
Events Location	Displays Events Location and changes made.
Events Booked	Displays Events booked on selected period and changes made.
Visitor	Displays Visitors information and changes made.
Config	Displays System Configuration Setup information details and changes made.

Accessing Information using Search Criteria

The following section describes the steps to look up for any information, whether it is a newly inserted record or past records with changes.

1. Enter the **Embarkation Date From / To**, and click the **Search** button at the ribbon bar.
2. If you are searching for change records of a certain period, enter the **Date Modify From /To** (optional), and then click the **Search** button.
3. To view records that are more than one voyage, enter the **Disembarkation Date From / To (optional)**, and then click the **Search** button.
4. The Summary tab displays a list of total records inserted, updated or cancelled.
   - Inserted column shows the number of new records/information transferred to the ship.
   - Updated column shows the number of changes/updates made to the guest and shore excursion information including cancellations.
   - Cancelled column shows the number of records physically removed from the database, for example; reservations made and cancelled at the very last minute.

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Figure 16-27 Summary of Search Records

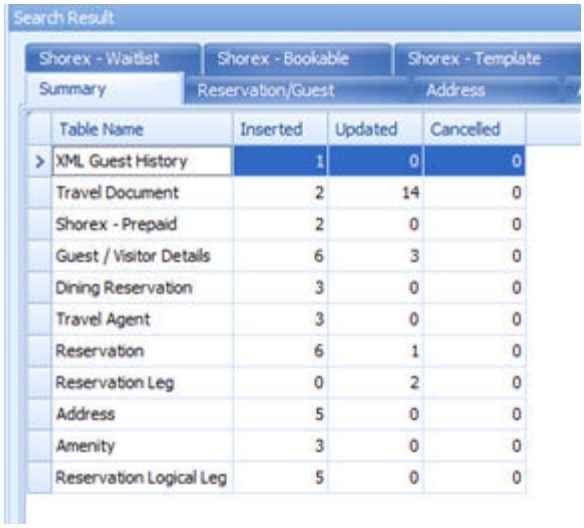
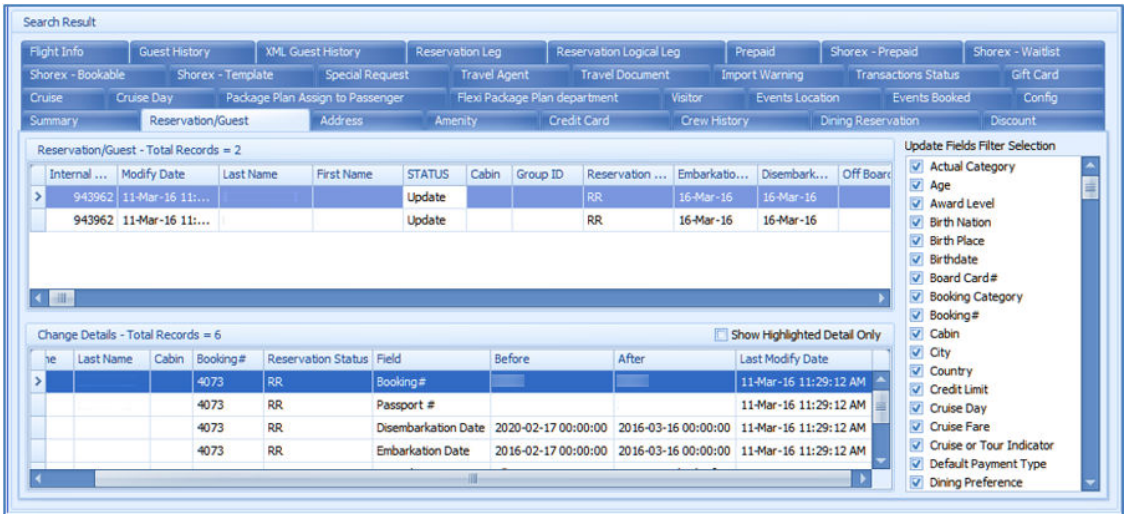


Table Name	Inserted	Updated	Cancelled
XML Guest History	1	0	0
Travel Document	2	14	0
Shorex - Prepaid	2	0	0
Guest / Visitor Details	6	3	0
Dining Reservation	3	0	0
Travel Agent	3	0	0
Reservation	6	1	0
Reservation Leg	0	2	0
Address	5	0	0
Amenity	3	0	0
Reservation Logical Leg	5	0	0

Viewing Information within a tab

Search results appear in the respective tab according to the system's data fields. The following steps describes ways to view search information for the period.

Figure 16-28 Information on Reservation/Guest Tab



1. From the ResOnline Viewer main window, select a tab to view. Search results and all the changes are shown.
2. The **Update** status of the Reservation records section represents the latest update. The changed values from before and after are reflected in the **Change** details section.
3. Use the **Update Fields Filter Selection** to filter the information to display at the Change Details section. Use the **Check All** or **Uncheck All** option to select or deselect all fields. You can save the view as a template for future use. See Setting Up User Definable Template on how to save a template view.
4. Check the **Show Highlighted Details** to view the highlighted records in the Change Details section.

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5. Click the **Load** button to refresh the information.

Viewing Tab Information using Built-In Filter Control

The program is pre-installed with a Built-in Filter Control function that allows you to re-order the information presented.

1. At the selected tab, right-click the header bar to open the **Built-in Filter Control**.
2. Select an option from the menu to re-order the presentation of the information.

Figure 16-29 Built-In Filter Controls

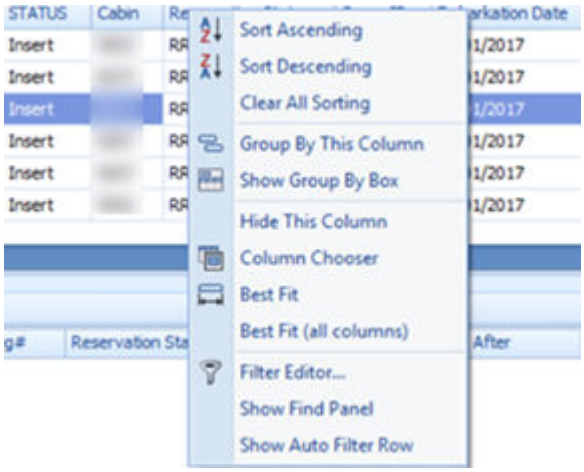


Table 16-4 Built-In Filter Controls

Function	Description
Sort Ascending	Re-orders the column to display in ascending order.
Sort Descending	Re-orders the column to display in descending order.
Clear All Sorting	Removes the column sort order.
Group by this column	Selects the group and displays in tree view.
Show Group by box	Hides the tree view pane above the column header.
Hide This Column	Permits you to hide the column from the table.
Column chooser	Permits you to choose, remove a field or insert hidden fields into the header.
Best Fit	Auto fits the selected column according to header name.
Best Fit (all columns)	Auto fits all columns according to header name.
Filter Editor	Filters the search by field name, date selection, user ID and others using queries such as "And,", "Or," and others.
Show Find Panel	Starts a keyword search bar.
Show Auto Filter Row	Shows the auto filter row separate from the list of other row.

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Configuring a View with Field Mappings

By default, all fields are shown in the available tabs. The Field Mappings function allows you to customize the tab view.

1. Click the **Field Mappings** button at the ribbon bar, and then click the **'+'** sign next to the table name in the field mapping setup window.
2. The actual database fields names appear in the table. Click the **Caption** field to rename the labels.
3. Enter a number in the **Position** field to re-order the column display if desired.
4. Check the **Hide** box to hide the field from the view.
5. Check the **Alert** box to push out a change notification to relevant parties when there are changes during reservation import. This alert notification is based on the setting defined in ResOnline Interface setting.
6. Click the **Save** button and then the **Close** button to exit the setup window

Figure 16-30 Field Mapping Setup Window



7. Click the **Load** button at the ribbon bar to refresh the information if you have chosen a user define template.

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Searching Information using Search XML

The reservation data is usually imported from the shore-side system using an XML file format. The Search XML function is used to search for the contents.

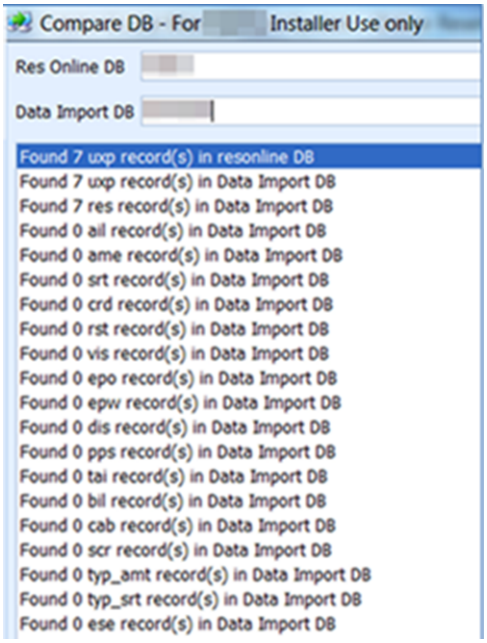
1. At the ribbon bar, click the **Search XML** button to open a search window.
2. Enter the **Reservation ID** or **Cabin number** in the search string, or any information in the XML file, and then click the **Search XML** button.
3. The number of records and the detailed contents is shown on the window.
4. Click the **Search within Content** button to narrow down the information.
5. Click the **Close** button to exit.

Comparing the Database

Since the reservation data is usually imported using the DGS ResOnline program, the Compare DB tool is used to compare the imported data with ResOnline Data for variance prior to importing them to the ship production database. This function is for the use of the SPMS Application Specialist.

1. At the ribbon bar, click the **Compare DB** button to open a database comparison window.
2. Enter the source database in the **ResOnline database name** field, the password in **DB Password**, and then select the **Date** from the drop-down list.
3. Repeat the same steps for the destination database in the **Data Import DB** field.
4. Click the **Compare DB** button.
5. Results are shown at the end of the process. If there are variances, check and update the record from the external system, and then re-import the reservation data.

Figure 16-31 Sample Data Comparison Records



6. Click the **Close** button to exit.

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Importing Reservation Data

The Import Reservation Data function allows you to import the last minute reservations, pre-paid gift card sales and reservation changes received in an XML file format.

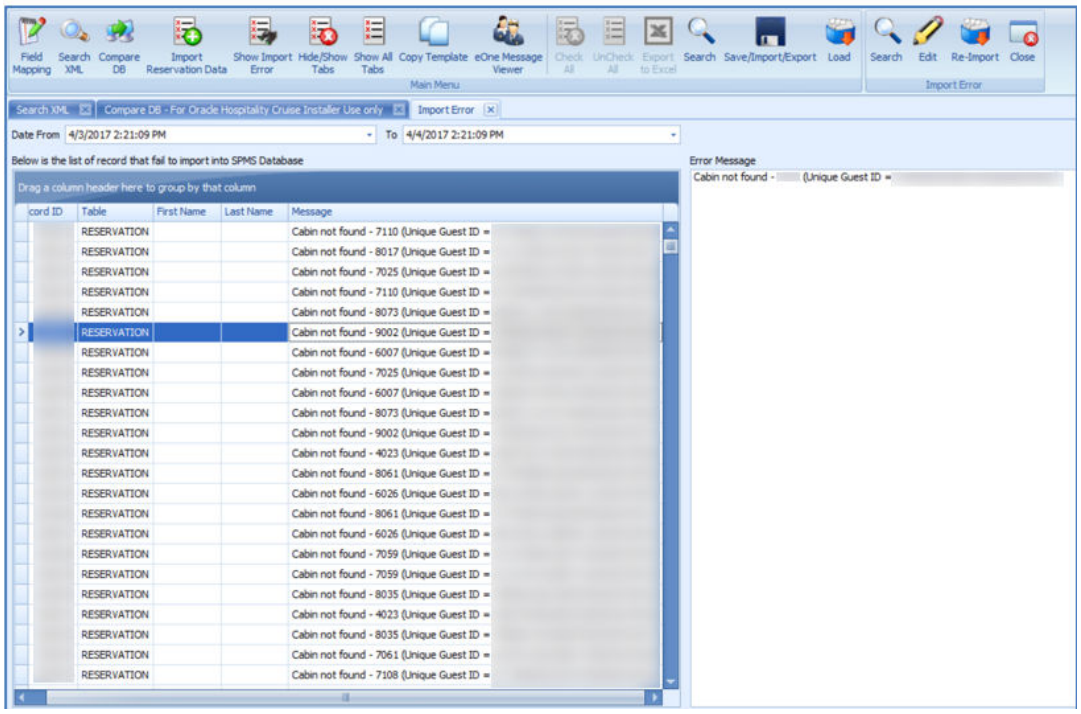
1. Click the **Import Reservation Data** button.
2. Locate the XML file in your computer's file system.
3. Click the **Open** button to start the import process. The system prompts the number of records updated/imported, and the import progress and records processed are shown in the **DGS ResOnline** program.

Verify Imported Data

The Show Import Error function enables you to search for any error reported when importing the data.

1. Click the **Show Import Error** button at the ribbon bar.
2. Enter the **Date From/To**, and then click the **Search** button. Error messages appear, if any.

Figure 16-32 Import Error Window



3. To correct the errors, select the line item to edit, and then click the **Edit** button.
4. Edit the description in the **Error Message box**, and then click the **Re-Import** button.

Defining Tabs to Hide/Show

By default, all available tabs are presented on the main window. If these tabs are not relevant to users currently logged in, you can hide them using the Hide/Show Tabs function.

1. Click the **Hide/Show Tabs** button at the ribbon bar.

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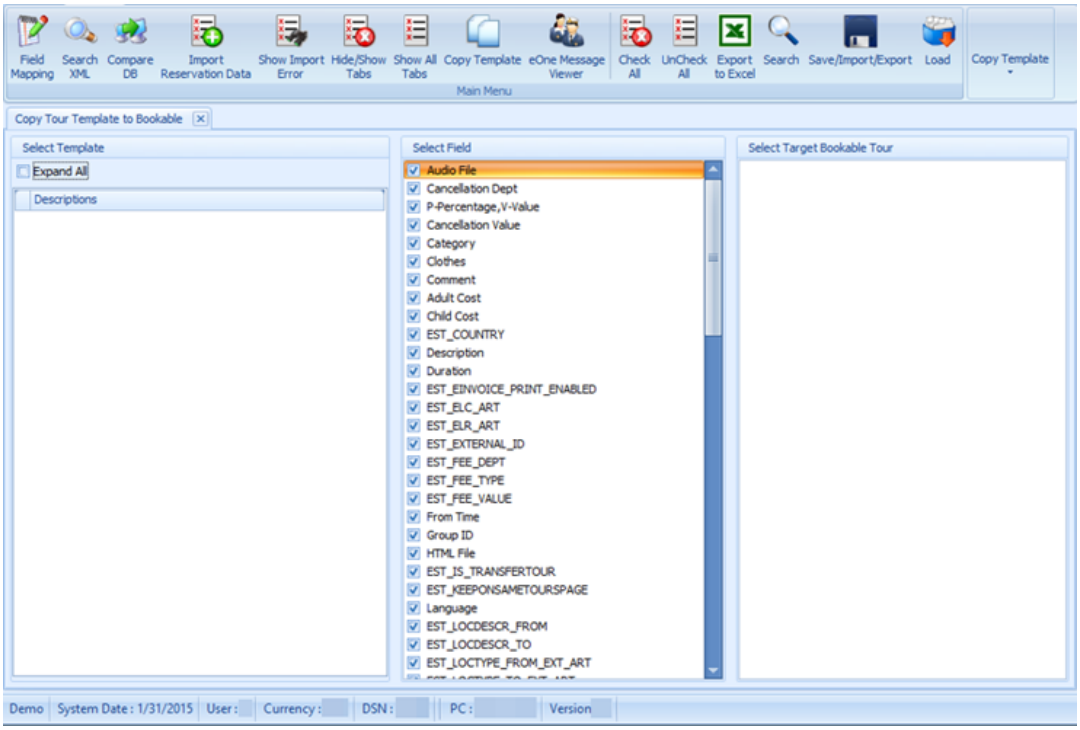
2. Select the tabs to hide by deselecting the respective checkbox and click the **Save** button.
3. To reset the view to its original presentation, click the **Show All Tabs** button or manually select the tabs to show/hide using the **Hide/Show Tabs** option. Alternatively, you can use the **User Define Template** option to define a view for all users. See Setting Up User Definable Template for more details.

Copy Template

The Copy Template is a function that pushes an update made to Bookable Template into multiple bookable tours, enabling you to change the bookable tour information within ResOnline Viewer instead of individually updating the tours in Shore Excursion module.

1. Click the **Copy Template** button at the ribbon bar.

Figure 16-33 Copy Tour Template Window



- **Select Template:** All bookable Templates currently loaded in the system and sorted by Port Name.
- **Select Field:** All fields available to be copied/updated from the template to the bookable.
- **Select Target Bookable Tour:** All bookable tour currently loaded in the system with service date and starting time.

2. At the Copy Tour Template window, select the template to copy by selecting the fields from the **Select Field** panel, and then mark the **Target Bookable Tour**.
3. Click the **Copy** button to complete the process and then click the **Close** button to exit.

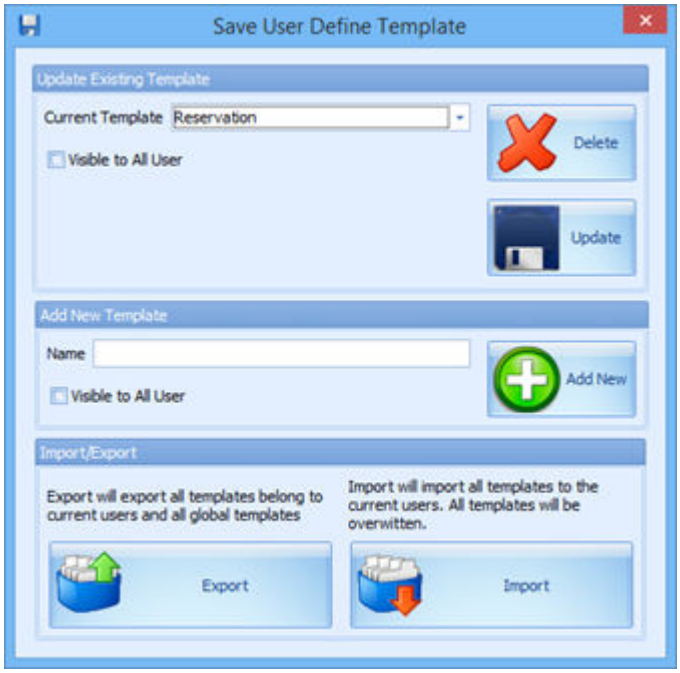
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Setting Up User Definable Template

An enormous amount of information is presented upon login, and you can choose to hide/show certain information in the window using this function. These templates are exportable for use on other vessels.

Adding New Template

Figure 16-34 User Definable Template Function



1. Click the **Save/Import/Export** button at the ribbon bar.
2. Enter a template name under **Add New Template**.
3. Check **'Visible to All User'** if the template is available to all users.
4. Click the **Add New** button.

Updating an Existing Template

1. Repeat steps 1 and 2 above of Adding New Template.
2. Select the **Current Template** from the drop-down list.
3. Click the **Update** button to save the changes.

Exporting Existing Templates

1. Click the **Save/Import/Export** button at the ribbon bar.
2. Click the **Export** button, select a destination to save to, and then click the **Save** button.

Importing Existing Templates

1. Click the **Save/Import/Export** button at the ribbon bar.

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2. Click the **Import** button and select the XML file from the folder where the template is stored, and then click the **Open** button.
3. The system inserts a new template or overrides the existing, if any.

Deleting Existing Template

1. Click the **Save/Import/Export** button at the ribbon bar.
2. Select the template to delete from the **Current Template** drop-down list.
3. Click the **Delete** button to confirm.

eOne Message Viewer

This function allows you to view the data transferred from/to SPMS through the eOne Interface using the Microsoft Message Queue (MSMQ). The information displayed in each of the tabs varies although the steps to obtain the information are the same.

Table 16-5 MSMQ Message Type

MSMQ Message	Description
eOne Incoming Message:	Displays all incoming messages received from eOne Interface.
eOne Outgoing Message:	Displays all changes sent to eOne Interface. For example update of name, embarkation/ disembarkation date, check-in, when synchronization is performed and others.
eOne Error Message:	Displays all messages of records that were not processed during synchronization.

Viewing Incoming, Outgoing or Error Messages from EONE

Use the following steps to view incoming messages sent from eOne.

1. At the ribbon bar, click the **eOne Message Viewer**.
2. In the eOne Message form, enter the sequence number in **From Message No** and **To Message No** field.
3. Specify the **Employee Number** to show a specific crew account.
4. Select the **Message Type** from the drop-down list or leave as default.
5. Click the **Search** button to display the detail messages on the respective window.

ResOnline Import Errors

This section describes the common error messages encountered during Data Import.

Reservation Not Found

This error message *"Reservation not found – xxxxxxxxxxx (Unique Guest ID= xxxxxxx)"* occurs when the guest information received does not exist in the SPMS system.

ID Does Not Exist

The *"ID Does Not Exist in [Typ table] (Unique Guest ID= xxxxx) "* error occurs when the Code/ID of certain fields are either different from what was stored in the database or does not exist in SPMS.

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Cruise Not Set Up

The *'No Changes = leg_id = xxxx,cruise not setup(Unique Guest ID= xxxxxx)"* error is a warning error. This occurs when the imported shore excursion booking for the next cruise is not set up in the System Cruise setup and is a reminder for you to setup the next cruise for data to be imported.

System Parameter

This section describes the parameters required to run the DGS ResOnline module. The parameters are set up in **Administration, System Setup, Database Parameter**.

Table 16-6 PAR Group General

PAR NAME	PAR VALUE	Description
Allow overwrite posted pre posting	0 – Disable 1 – Enable	0 - Do not allow update PPS when PPS_POS_ID > 0 1 - Allow Update PPS when PPS_POS_ID > 0 and POS_CLOSED=0
Number of day(s) before embarkation alert	Number of day(s)	The system sends an alert e-mail for change less than x days before embarkation

Interface Parameters

Apart from enabling the above system parameters, the program also requires interface parameter settings to further define and manage the information to be transferred to Oracle Hospitality Cruise Shipboard Property Management System (SPMS). The interface parameters are categorized into three sub-tabs in the DGS ResOnline, Settings tab.

- **Parameters:** All settings for data transfer from Oracle Cruise Hospitality Fleet Management System (FMS). See Table 1-2 - DGS ResOnline Parameters for detailed description of the parameters.
- **Parameters 1:** All settings for data transfer from FMS (continuous).
- **Alert E-Mail List:** An alert email list to inform user of the transferred reservation status.

The information transferred from FMS to SPMS depends on the settings.

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Figure 16-35 DGS ResOnline Parameters

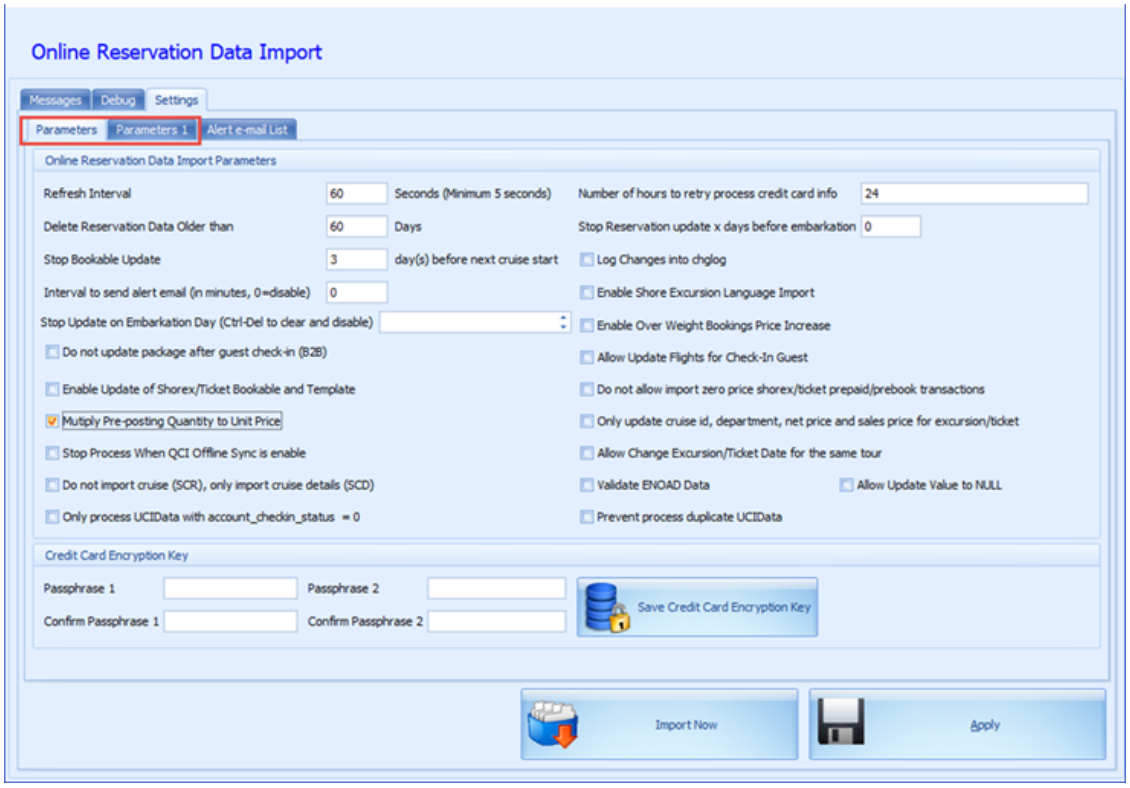


Table 16-7 DGS ResOnline Parameters

Parameter	Description
Refresh interval by seconds	The intervals time to obtain new data to transfer if any. Default minimum interval is 15 seconds.

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Table 16-7 (Cont.) DGS ResOnline Parameters

Parameter	Description
Delete reservation Data Older than x days	Minimum setting is seven days based on the following process: 1. The system removes messages from Reservation that has status = 3 and Reservation modification date < system date – x days. 2. Remove Reservation Response data (RSP) based on RSP_MODDATE compared against x days. 3. Remove Reservation Details Log (RSD) based on RSD_RSL_ID IN (SELECT RSL_ID FROM RSL WHERE (RSL_EMB_E IS NOT NULL AND RSL_EMB_E < DATE (SYSTEM DATE – X DAYS) OR (RSL_EMB_E IS NULL AND RSL_MODDATE < DATE (SYSTEM DATE – X DAYS) 4. Remove Reservation Update Log (RSL) - WHERE (RSL_EMB_E IS NOT NULL AND RSL_EMB_E < TO_DATE('2016-07-12','YYYY-MM-DD')) OR (RSL_EMB_E IS NULL AND RSL_MODDATE < TO_DATE('2016-07-12','YYYY-MM-DD'))
Stop Bookable Update x days(s) before next cruise start	This stops any shore excursion and bookable ticket update **x** days before the start of next cruise. This change only affects shore excursion bookable and templates for future cruise.
Interval to send alert email (in minutes, 0=disable)	Define the interval to send an alert email, based on email list defined in 'Alert e-mail List' tab. 0 = disable send alert email.
Stop Update on Embarkation Day (Ctrl+Del to clear and disable)	Define the time to stop an update on embarkation day. Press **Ctrl+Del** to clear the time value.
Do not update package after guest check-in (B2B)	This stops the update of package for checked-in guest, and is only applicable to back to back guest.
Enable Update of Shorex/Ticket Bookable and Template	This allows update of shore excursion/bookable ticket tour and template. This rule depends on the "Stop Bookable update x day(s) before next Cruise start."
Multiply Pre-posting Quantity to Unit Price	This multiplies the pre-posting quantity by unit price for input to PPS_TOTAL field. Requires additional configuration in Administration module, Database parameter.
Stop Process When QCI Offline Sync is enable	This function pauses the ResOnline updates when the QCI Offline Sync process is enabled and resume when QCI Offline Sync stop is running.
Do not import cruise (SCR), only import cruise details (SCD)	This flag is to only import System Cruise Days Information, excluding Cruise Itineraries.

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Table 16-7 (Cont.) DGS ResOnline Parameters

Parameter	Description
Only process UCIData with account_checkin_status = 0	This flag *only* processes UCIData with status Registration that is not complete. ACCOUNT_CHECKIN_STATUS=RES_RGN_COMPLETE
Number of hours to retry process credit card info	Define number of hours to retry processing of credit info in DGS.
Stop Reservation update x days before embarkation	Stops reservation update **x** days before of embarkation date.
Log Changes into chglog	Log changes made into change log table.
Enable Shore Excursion Language import	This enables the import of language from Shore Excursion.
Enable Over Weight Bookings Price Increase	This enables price increase by percent set in Overweight Booking.parameter
Allow Update Flights for Check-In Guest	This enables the flight info update for Check-In Guest.
Do not allow import zero price shorex/ticket prepaid/prebook transactions	This disables the import of prepaid/pre-book transactions Shore Excursion with zero pricing.
Only update cruise id, department, net price and sales price for excursion/ticket	This only allow updates of cruise ID, department, net price and sales price for excursion only.
Allow Change Excursion/Ticket Date for the same tour	This enables changes made to tour/ticket of the same record even though the booking date is different.
Validate ENOAD Data	When enabled, the system validates the Electronic Notice of Arrival/Departure (ENOAD) data during import, and inserts as Import Warning if any of the ENOAD data is missing. The ENOAD data validation warning is viewable from ResOnlineViewer application, Import warnings.
Allow Update Value to NULL	This allows the change of Excursion or Ticket Date for the same tour.
Prevent process duplicate UCIData	This enables the update of value to null when the flag is checked.
Allow Field Update for B2B Guest : Disembarkation Date	This enables the additional fields to be updated for back to back guest, even after guest has checked in.

The system is capable of transferring eight different types of messages (`MSSG_NOTES`) using ResOnline and they are:

1. **UCIData** - Reservation record
2. **ReservationsData** - Reservation record
3. **DataDefinition** - All field settings in Shore Excursion and Ticket description.
4. **ItinData** - Cruise Itinerary
5. **CAMVisitor** - Visitor Info
6. **SPMSConfig** - SPMS Configuration setup

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7. **Transferstatuslog** - Summary of Transaction status
8. **OHCEVENT** - Field setting used in Event module

The reservation messages in`(RESERVATION_MSGS)Table` is updated with one of the following statuses after a successful import.

1. MSSG_STATUS = 2 (New record that ResOnline processes)
2. MSSG_STATUS = 3 (Successfully processed)
3. MSSG_STATUS = 5 (`RESERVATION_RES_ID in XML <> RESERVATION_RES_ID in RESERVATION_MSGS table`)
4. MSSG_STATUS = 6 (Current reservation is older than previous, request for resend)
5. MSSG_STATUS = 7 (No Future cruise created in system)
6. MSSG_STATUS = 8 (Failure)

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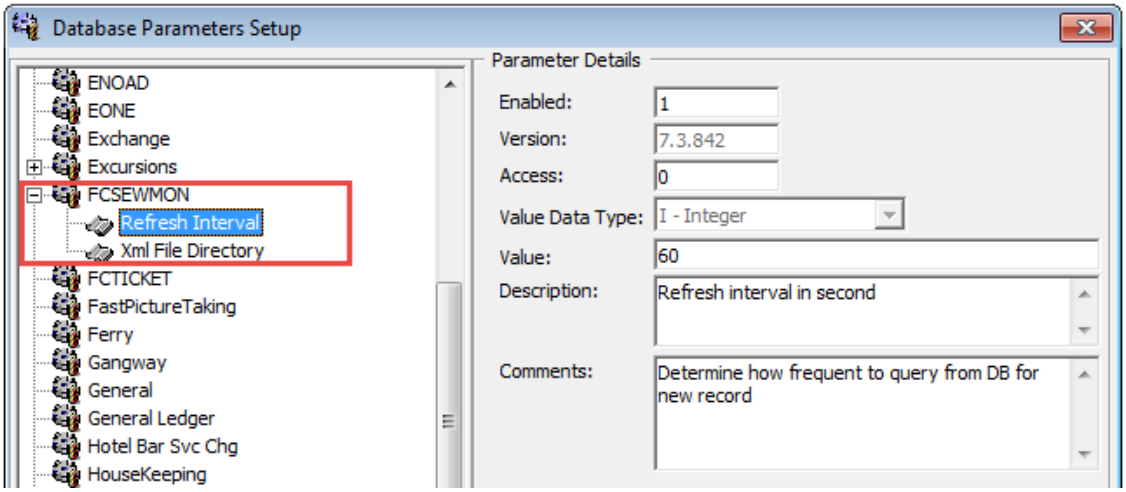
Seaware Monitor

OHC Seaware Monitor is a module used in addition to the Seaware integration for Ferry Operations. This module monitors the activities from Oracle Hospitality Cruise (OHC) Shipboard Property Management System (SPMS) to Seaware.

Setting up Parameters

Before you begin using the Seaware Monitor program, you must set up the two parameters below in Administration module, System Setup, Database Parameters.

Figure 17-1 Database Parameters



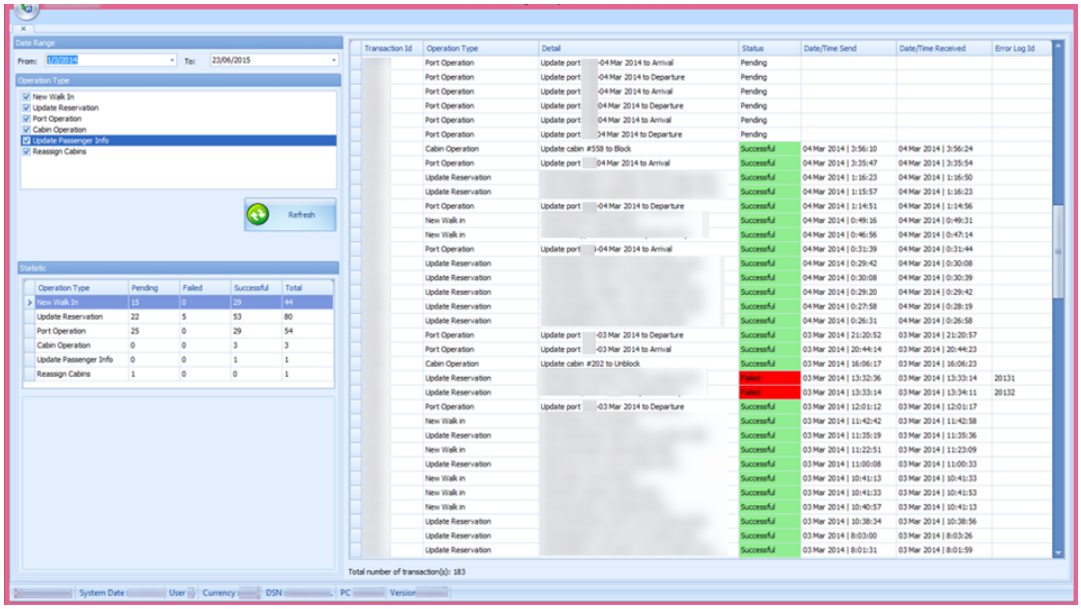
Launching Seaware Monitor

The OHC Seaware Monitor is accessible from the OHC Launch Panel.

1. To launch the program, double-click the **OHC Seaware Monitor**.
2. In the application window, select the date range and click the **Refresh** button to display the activities.

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Figure 17-2 Seaware Monitor Activities



In the Statistic section,

- The Pending status refers to the transaction that has not been sent to Seaware for processing.
- The Successful status refers to transactions that are processed successfully and responded to by Seaware.
- The Failed status refers to the transaction that has been processed but failed after responded to by Seaware.

Log Based on Syn_Operation

The following status codes explain the types and details of error messages logged that allow you to extract the content into an XML file using the steps below.

Table 17-1 Syn_Operation Error Code

Log	Description
1	New reservation
2	Update reservation
3	Port operation
4	Cargo
5	Cabin operation
6	Update Reservation include res_grp
7	Update personal information

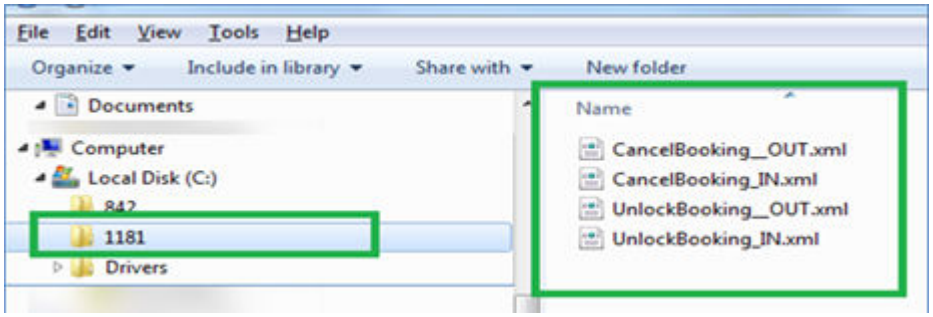
To view the log details,

1. Double-click the **failed transactions**.
2. Click **Extract**.

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3. At the confirmation prompt, click **OK**. This saves the transaction error to the default save folder on the client PC in an Extensive Markup Language (XML) format.

Figure 17-3 Seaware XML File Types



> **Note**
>
> Error attachments are stored in the SEWLOG_XML table.

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Part VI
Safety / Security

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Safety Drill

The Safety Drill module is a program that manages the Muster or Emergency drills to be conducted by the crew before the ship embark on a voyage.

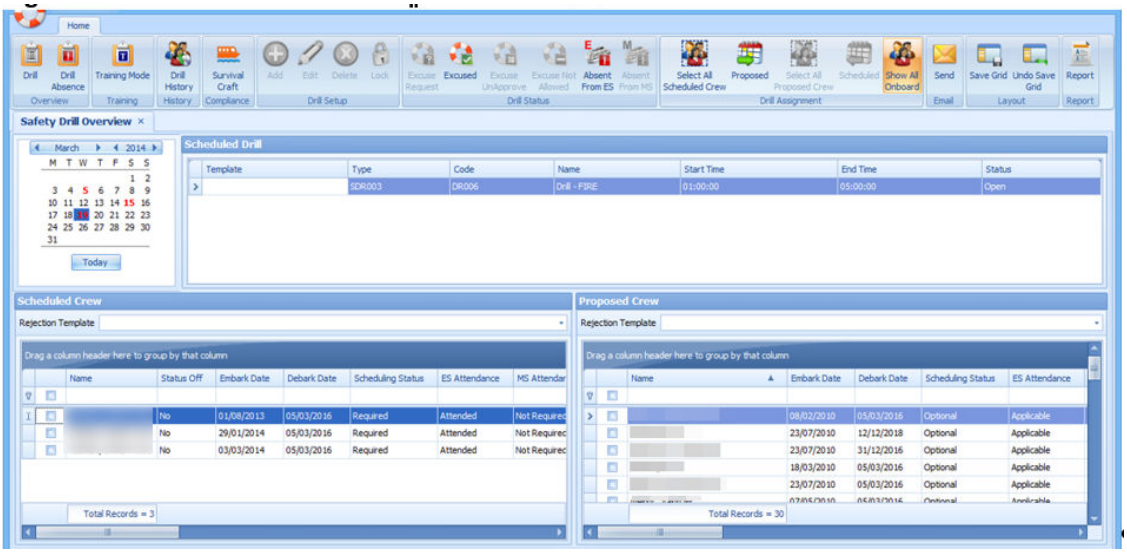
Safety Drill Setup

The Safety Drill module allows you to schedule drills before the ship embarks on a voyage and maintains a record of the drills performed. It also has a training mode for the crew, where the training attendance is kept.

The functions in this module are: Drill Scheduling/Assignment, Drill Absence, Training mode, Drill History, and Survival Craft Compliance.

This guide assumes you have configured all the required codes in the *Administration module*.

Figure 18-1 Safety Drill Overview



Setting up a Drill

Before you can assign the crew to the drill, you must schedule all drills in the Drill Mode.

1. At the Safety Drill Overview window, select a date from the calendar editor.
2. Click the **Add** button at the ribbon bar to add a new drill.

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Figure 18-2 Add Drill Window

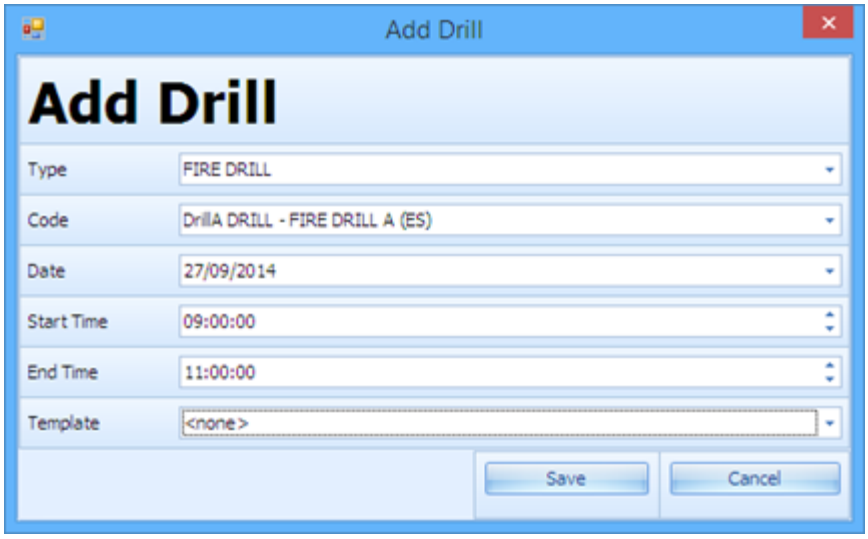


Table 18-1 Add Drill Field Description

Field Name	Description
Type	Displays the drill definition without courses and certificates assigned. Refers to Drill Type setup.
Code	Displays all definitions linked to Drill Definition setup of the selected drill type.
Date	Planned drill date.
Start Time	The drill scheduled start time
End Time	The drill scheduled end time
Template	Proposed eligible crew to the scheduled drill based on Safety Department, Safety Position, Safety Group and Safety Function assigned in the Drill template, and all templates setup in Drill Template are shown.

3. At the Add Drill window, select the **Type, Code, Date, Start/End Time,** and **Template** from the drop-down list.
4. Click the **Save** button to save the drill. Dates that have scheduled drills are shown in red on the calendar.

Editing a Drill

You can reschedule a drill according to the operational needs. Rescheduling is not allowed when the Drill Status is locked, and the Drill Type or Code is no longer editable.

1. At the Safety Drill Overview window, select the **drill date** from the calendar.
2. Click the **Edit** at the ribbon bar and select a new **date**, and **start/end time** from the drop-down list.
3. Click the **Save** button to save the record.

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Deleting a Drill

You can delete a drill that has crew members scheduled. However, it is not permissible when the scheduled drill has attendance marked with **Absent**.

To delete, select the **drill date** and click **Delete** on the ribbon bar.

Locking a Drill

The Lock Drill function is enabled when the drill is the first drill of the same type. You can lock the subsequent drills of the same type only when the first drill is locked.

1. At the Safety Drill Overview window, select the **first drill date** of the same type.
2. Click the **Lock** at the ribbon bar. If the drill is not the first drill of the same type, the system prompts you to check for the first drill.
3. Click the **OK** button to close the prompt.
4. Locate the first drill and repeat the above steps.

Unlocking a Drill

The Unlock Drill function is enabled when the drill is the last drill of the same type. The button is enabled for the second last drill of the same type, if the last drill has been unlocked, following a reverse sequence.

1. At the Safety Drill Overview window, select the **last drill date** of the same type.
2. Click the **Unlock** at the ribbon bar.
3. Click the **OK** button.

Assigning / Unassigning Crew to a Drill

Once a drill is set up, the Chief Safety Officer or assistant can assign a crew to the scheduled drill by selecting the Crew eligible for drill from the **Proposed Crew** grid. The crew eligibility is based on the following criteria:

- The crew is checked in or expected.
- The crew is assigned in the Muster list assignment.
- Rule defined in Drill Definition.

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Figure 18-3 Proposed Crew Window

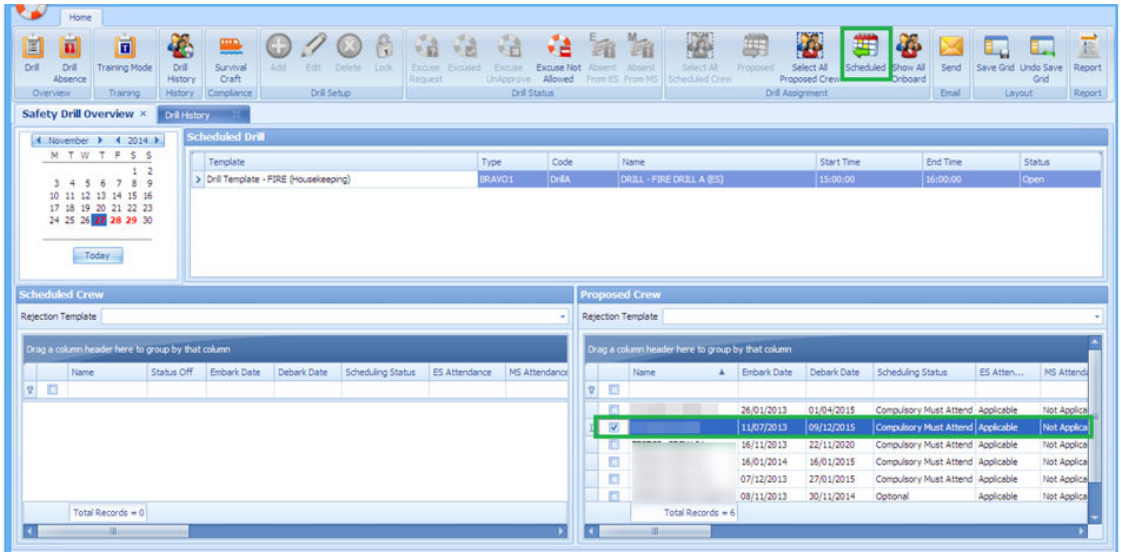


Table 18-2 Field Description of Proposed Crew Grid

Field Name	Description
Name	Crew Name
Embark Date	Crew embarkation date
Debark Date	Crew debarkation date
Scheduling Status	Defines the attendance is compulsory or optional. Refers to rules in Safety Drill Type.
ES Attendance	Defines whether Emergency Attendance is required. Refers to Drill Definition Attendance Requirement.
MS Attendance	Defines whether Muster Attendance is required. Refers to Drill Definition Attendance Requirement.
Emergency #	Emergency number defined in Muster List Setup.
Critical E Number	Defines whether the course/certificate will auto expire after Critical E# is changed. This changes the attendance requirement in the drill setup. Refers to Muster List Assignment.
Operational Position	Crew Operational Position. Refers to Crew Operational Position setup.
Safety Department	Safety Department assigned. Refers to Safety Department setup.
Safety Position	Safety Position assigned. Refers to Safety Position setup.
Safety Function	Safety Function assigned. Refers to Safety Function setup.
LifeBoat	Lifeboat assigned. Refers to Lifeboat Setup.
Muster Station	Muster Station location. Refers to Muster Station setup.
Safety Role	Safety role assigned. Refers to Safety Role setup.

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Table 18-2 (Cont.) Field Description of Proposed Crew Grid

Field Name	Description
Safety Group	Safety Group assigned. Refers to Safety Group setup.
Emergency Station	Station type. Refers to Muster Station Setup.
Deck	Deck location. Refers to Deck setup. (Advance Safety Drill mode).
Firezone	Fire zone assigned. Refers to Firezone setup. (Advance Safety Drill mode).
Stairwell	Stairwell location. Refers to Stairwell setup. (Advance Safety Drill mode).
Side	Location side of Emergency Station. Refers to default system codes.
Craft Type	Type of Craft. Refers to default system codes.
Craft Side	Safety Boat location - port or starboard. Refers to default system codes.
Side	Location of the Muster station - port or starboard.

Scheduling Crew to a Drill

Table 18-3 Field Description of Scheduled Crew Grid

Field Name	Description
Name	Crew Name.
Status Off	If the status is *YES*, this indicates that Crew disembarkation date is after the drill date.
Embark Date	Crew embarkation date.
Debark Date	Crew debarkation date.
Scheduling Status	Defines whether attendance is compulsory or optional. Refers to rules in Safety Drill Type.
ES Attendance	Defines whether Emergency Attendance is required. Refers to Drill Definition Attendance Requirement.
MS Attendance	Defines whether Muster Attendance is required. Refers to Drill Definition Attendance Requirement.
Interview	Status of the interview whether it is Pending or Blank. Status only changes when the crew is absent for drill.
Emergency #	Emergency number defined in Muster List Setup.
Critical E Number	Defines whether course/certificate will auto expire after Critical E# is changed. Refers to Muster List Assignment.
Operational Position	Crew Operational Position. Refers to Crew Operational Position setup.
Safety Department	Safety Department assigned. Refers to Safety Department setup.

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Table 18-3 (Cont.) Field Description of Scheduled Crew Grid

Field Name	Description
Safety Position	Safety Position assigned. Refers to Safety Position setup.
Safety Function	Safety Function assigned. Refers to Safety Function setup.
LifeBoat	Lifeboat assigned. Refers to Lifeboat Setup.
Muster Station	Muster Station location. Refers to Muster Station setup.
Safety Role	Safety role assigned. Refers to Safety Role setup.
Safety Group	Safety Group assigned. Refers to Safety Group setup.
Emergency Station	Station type. Refers to Muster Station Setup.
Deck	Deck location. Refers to Deck setup. (Advance Safety Drill mode)
Firezone	Fire zone assigned. Refers to Firezone setup. (Advance Safety Drill mode).
Stairwell	Stairwell location. Refers to Stairwell setup. (Advance Safety Drill mode).
Side	Location side of Emergency Station. Refers to default system codes.
Craft Type	Type of Craft. Refers to default system codes.
Craft Side	Safety Boat location -port or starboard. Refers to default system codes.
Side	Location of the Muster station - port or starboard.

1. Select the **Drill Date** from the **Safety Drill Overview, Calendar**.
2. Select the drill in the **Schedule Drill** section to populate the Crew due for drill in the **Proposed Crew** grid.
3. At the **Proposed Crew** grid, select the checkbox next to the name to select the crew or click **Select All Proposed Crew** at the ribbon bar to select all crew.
4. Click the **Scheduled** button to assign. The selected crew name will appear in the **Scheduled Crew** grid.
5. At the **Scheduled Crew** grid, the **Status Off** field defaults to **No**. Only Crew with disembarkation after the drill date is set to **Yes**.

Unscheduled Crew from Drill

1. From the **Calendar** tab, select a scheduled **Drill date**, and then select the drill in the **Schedule Drill** section.
2. Crew names that are due for drills are auto-populated in the **Proposed Crew** grid.
3. From the **Scheduled Crew** grid, select the checkbox next to the name or select the **Select All Scheduled Crew** at the ribbon bar to select all crew, and click **Proposed** to unassigned.
4. The selected crew name will appear in the **Proposed Crew** grid

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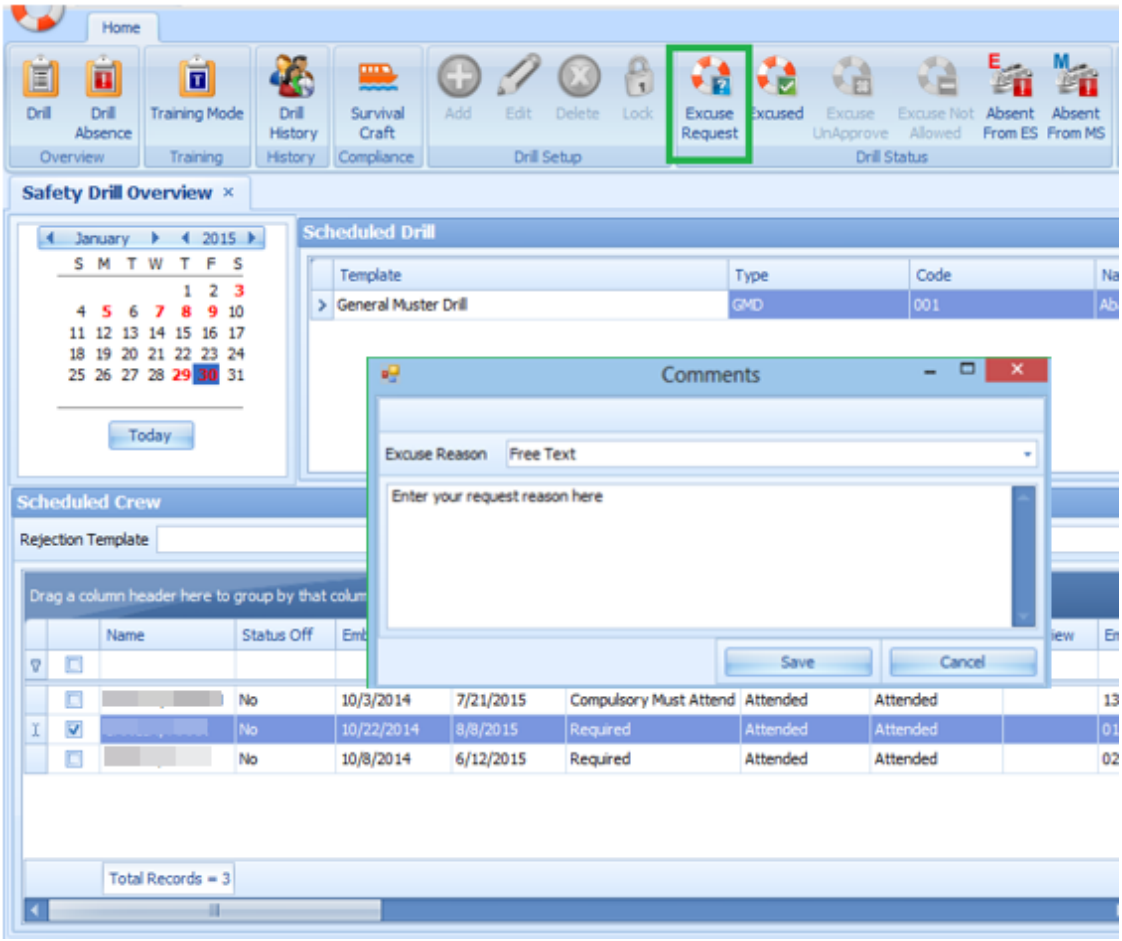
Crew Attendance Status

A crew might be excused from attending the drill or absent for a reason. By default, the attendance of the crew in the **Scheduled Crew** grid is **Attended**. The Chief Safety Officer or his/her assistant is responsible in managing the crew attendance for the drill, and the following sections describe the available status.

Setting an Excuse Request

An Excuse Request function is only available to a crew that has **Scheduling Status** equals to **Required**. This function is not applicable to a crew that has **Compulsory Must Attend** status.

Figure 18-4 Excuse Request Window



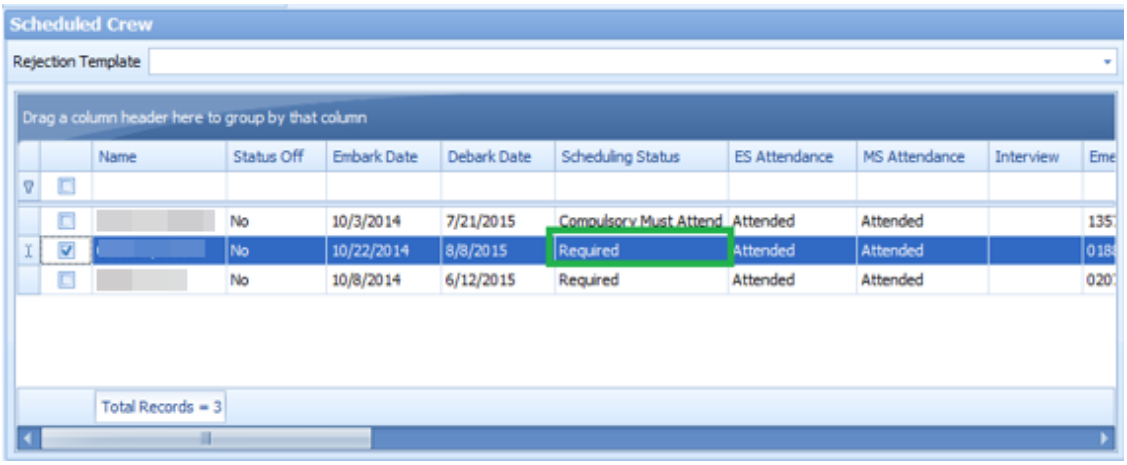
1. Select the crew from the **Scheduled Crew** grid with the **Required** status.
2. Click the **Excuse Request** at the ribbon bar.
3. The system prompts an **Excuse Request Reason** input window. Select the reason from the drop-down list.
4. Click the **Save** button.

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Setting an Excused Status

An Excused function is only available to a crew that has **Scheduling Status** equal to **Required** or **Excuse Pending**. This function does not apply to Crew that has **Compulsory Must Attend** status.

Figure 18-5 Excuse Request Status



1. Select the crew from the **Scheduled Crew** grid with the **Required** status.
2. Click the **Excused** button at the ribbon bar. The crew **Scheduling Status** now resets to **Excused**.

Resetting an Undo Excused Status

The Undo Excuse function is only available to crew with **Scheduling Status** set to **Excused**.

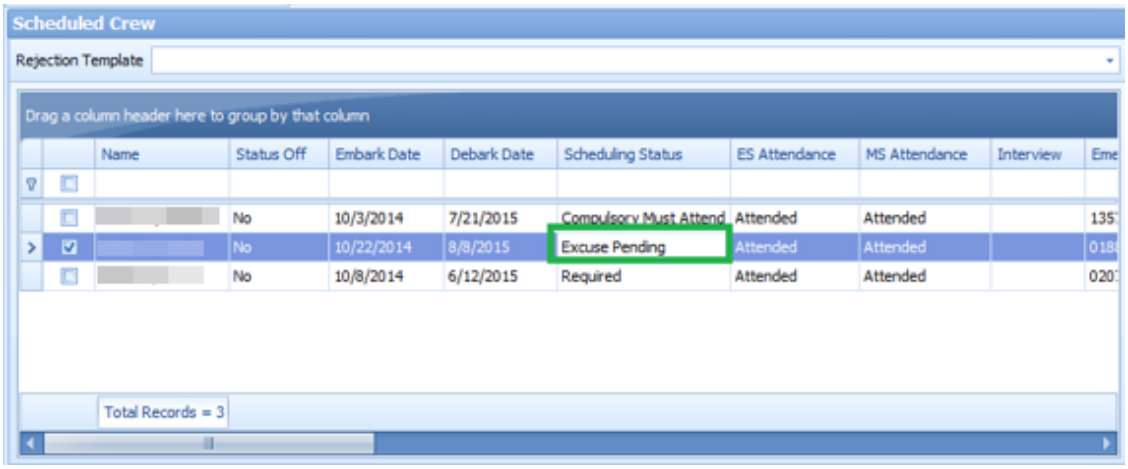
1. Select the crew from the **Scheduled Crew** grid with the **Excused** status.
2. Click the **Undo Excuse** button on the ribbon bar. This resets the status to **Required**.

Setting an Excused Unapproved Status

The Undo Excuse function is only available to a crew that has **Scheduling Status** set to **Excused Pending**.

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Figure 18-6 Excuse Unapproved Status



1. Select the crew from the **Scheduled Crew** grid with the **Excused Pending** status.
2. Click the **Excuse Unapproved** button at the ribbon bar to reset the status to **Required**.
3. The system prompts the **Excuse Unapproved Reason** input window. Select the reason from the drop-down list, and click **Save**.

Setting an Excuse Not Allowed Status

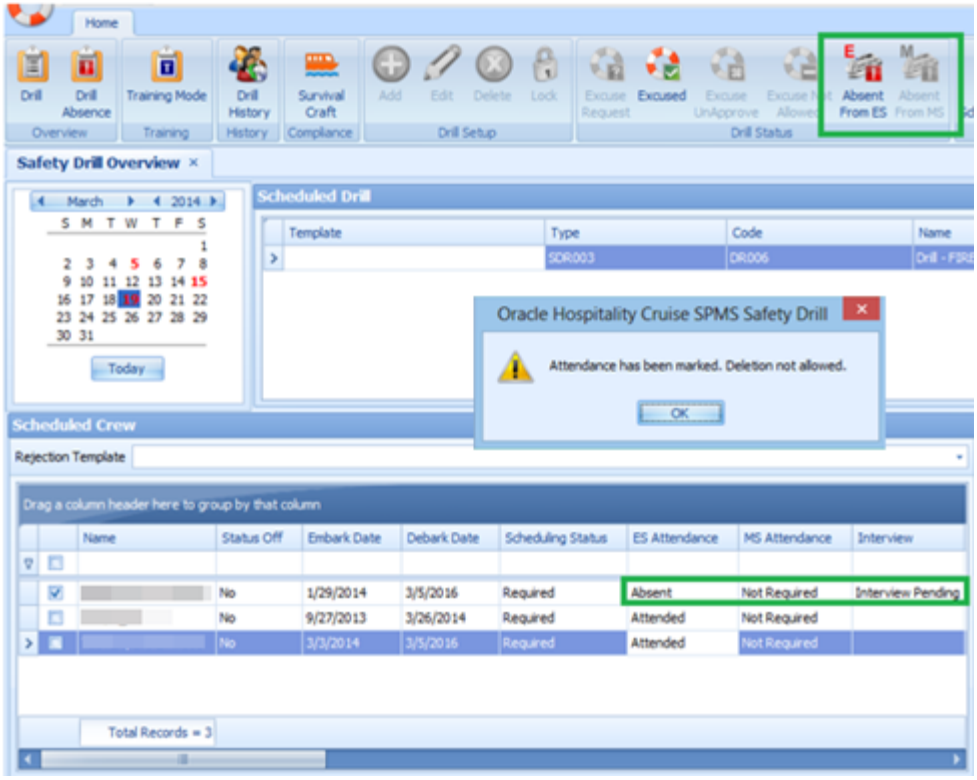
1. Select the crew from the **Proposed Crew** grid.
2. Click the **Excuse Not Allowed** at the ribbon bar.
3. The **Scheduling Status** now resets to **Compulsory Must Attend**.

Setting an Absent from ES/MS

The Absent setting from the ES/MS function records the absenteeism of the crew scheduled for a drill. An interview is scheduled when the attendance is marked as absent.

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Figure 18-7 Absent From ES/MS



1. Select the crew from the **Scheduled Crew** grid.
2. Click the **Absent From ES** or **Absent From MS** button on the ribbon bar, depending on the drill attendance of the crew.
3. The **Scheduling Status** resets to **Absent**. In the **Interview** column, the status is set to **Interview Pending**. Removing a crew with the **Absent** status is not allowed and prompts a message stating “Attendence has been marked. Deletion not allowed” when you try to remove the crew from the schedule.

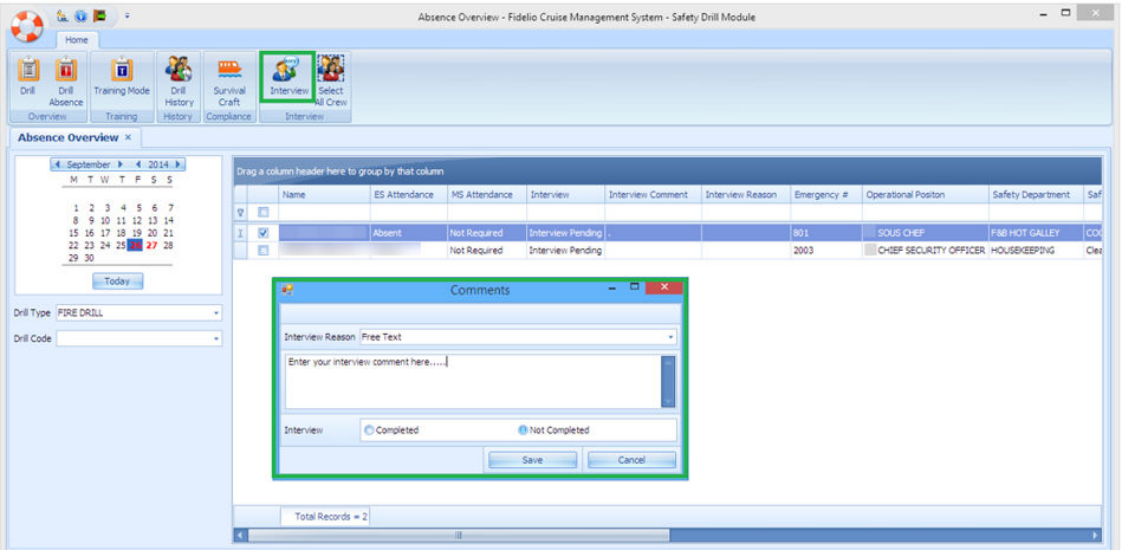
Drill Absence

The Drill Absence manages absentees from the scheduled drill. By default, the crew attendance is set to **Attended** at scheduling and absent is marked at the end of the drill.

A list of absentees can be extracted by **Drill Type**, excluding those that were set as **Excused** from the drill.

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Figure 18-8 Drill Absence Overview



1. Select the **Drill Absence** from the ribbon bar.
2. Select the drill date from the **Calendar** tab.
3. Select the **Drill Type** and/or **Drill code** from the drop-down list. If the drill code is blank, the system displays all absentees for that date.
4. From the Absentees list, select a crew name and click **Interview**.
5. At the **Interview Comment** dialogue box, select the **Interview Reason** from the drop-down list, and enter the comments or for manual input select **Free Text**.
6. At the **Interview status,** select **Completed** or **Not Completed**.
7. Click the **Save** button. Once the status is set to **Completed** and saved, change is not allowed.

Training Mode

It is a regulatory requirement that all officers and crews are to undergo complete safety training. The Training Mode is a function that records all training completed through the course and certificate attendance.

The functions in Training Mode are similar to Drill mode, enabling the Chief Safety Officer to schedule a training drill according to the course and certificate set up for each safety rules. Other functions included in this module are **Send Email**, **Report**, **Barcode Scanning**, and **Save Search Criteria**.

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Figure 18-9 Training Mode Functions

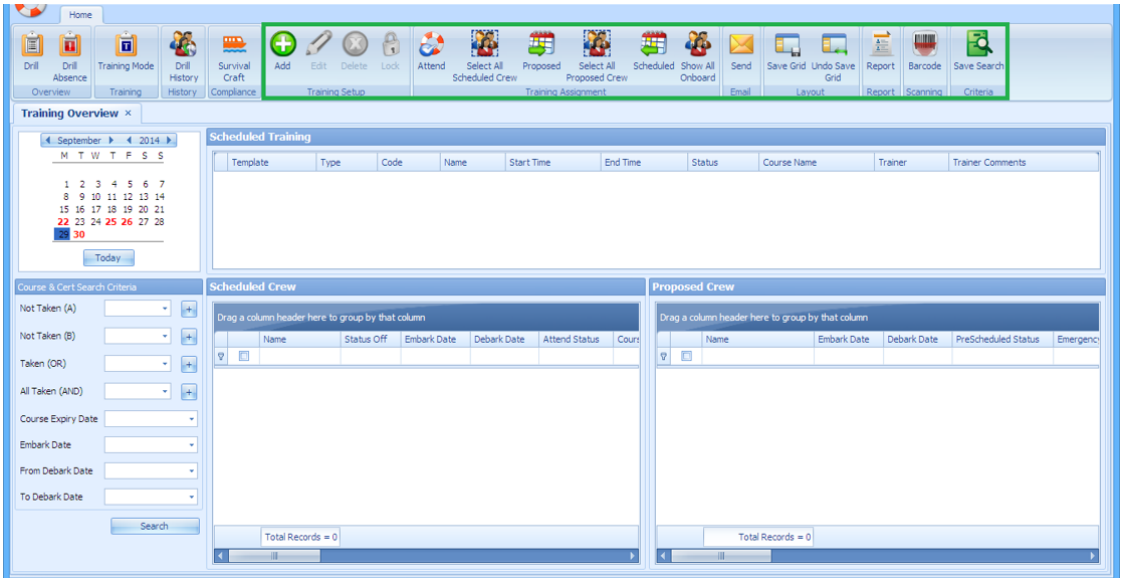


Table 18-4 Field Description of Training Drill Overview

Field Name	Description
Type	Displays the drill definition without courses and certificate assigned. Refer to **Drill Type** setup.
Code	Displays all definitions linked to **Drill Definition** setup of the selected drill type.
Date	Planned drill date.
Start Time	Drill scheduled start time.
End Time	Drill scheduled end time.
Template	Proposed eligible crew to scheduled drill based on Safety Department, Safety Position, Safety Group and Safety Function assigned in the Drill template and all templates set up in the Drill Template are shown.
Trainer	Trainer's name.
Trainer Comments	Details or comments of the course.

Setting up Training Drill

Similar to the Safety Drill function, you must schedule a drill in the Training Drill mode before assigning a crew to the drill.

1. At the Training Overview window, select a **date** from the calendar. Dates that have scheduled drills are shown in red in the calendar.
2. Click the **Add** button at the ribbon bar to add a drill.
3. At the Add Training window, select the **Type, Code, Date, Start/End Time, Template**, and **Trainer** from the drop-down list.
4. Insert the course details/comment, if any.
5. Click the **Save** button to save the drill.

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Editing a Drill

The Edit Drill function allows you to reschedule a drill according to operational needs. Rescheduling is not possible when the Drill Status is **locked**, and the **Drill Type** or **Code** is not editable.

1. At the Training Overview window, select the **drill date** to edit.
2. Click the **Edit** button at the ribbon bar.
3. Select a new **date, start/end time** from the drop-down list.
4. Click the **Save** button to save the record.

Deleting a Drill

You can delete a drill even with crew members scheduled. However, it is not permissible when the scheduled drill has attendance marked as **Absent**.

1. At the Training Overview window, select the **drill date** to delete.
2. Click the **Delete** button on the ribbon bar.
3. Select **Yes** when prompted.

Locking a Drill

The Lock drill function is enabled when the drill is the *first drill* of the same type. You can lock the subsequent drills of the same type when the first drill is locked.

1. At the Training Overview window, select the first drill date of the same drill type.
2. Click the **Lock** button at the ribbon bar.
3. If the drill is not the first drill of the same type, you will receive a notification prompt to check for the first drill.
4. Click the **OK** button to return to the previous screen.

Unlocking a Drill

The Unlock drill function is enabled when the drill is the last drill of the same type, and the icon is enabled for the second to the last drill of the same type if the last drill has been unlocked. Following is a reverse sequence.

1. At the Training window, select the last **drill date** of the same type.
2. Click the **Unlock** button at the ribbon bar.
3. Click the **OK** button.

Assigning/Unassigning Crew to Training Drill

Once a Training Drill is set up, the Chief Safety Officer or assistant can assign crews to the scheduled drill. This can be done by selecting the crew eligible for a training drill from the **Proposed Crew** grid. Eligibility of the crew is based on the following criteria:

- The crew is checked-in or expected.
- The crew is assigned in the Muster list assignment.
- Required Course and Certificate as defined in Drill Definition.
- The training date is prior to crew's expected disembarkation date.

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Figure 18-10 Training Drill Crew Assignment

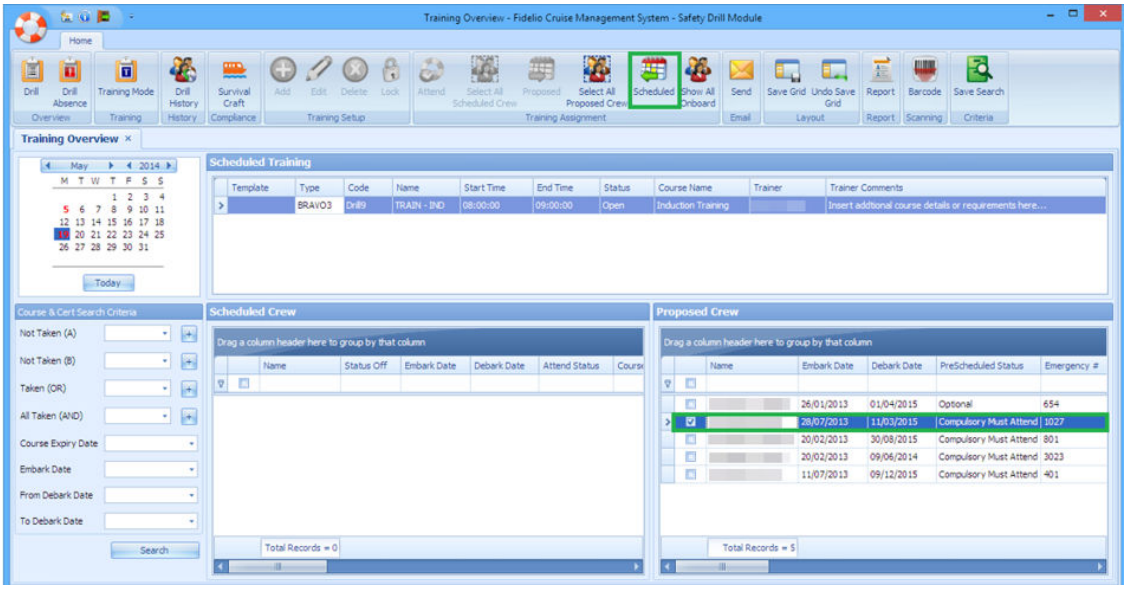


Table 18-5 Field Description of Proposed Crew Grid

Field Name	Description
Name	Crew Name.
Embark Date	Crew embarkation date.
Debark Date	Crew debarkation date.
PreScheduled Status	Defines whether attendance is compulsory or optional. Refers to rules set in Safety Drill Type and Course and Certificate taken
Emergency #	Emergency number defined in Muster List Setup
Critical E Number	Defines whether the course/certificate will auto expire after Critical E# is changed. Refers to Muster List Assignment.
Operational Position	Crew Operational Position. Refers to Crew Operational Position setup.
Safety Department	Safety Department assigned. Refers to Safety Department setup.
Safety Position	Safety Position assigned. Refers to Safety Position setup.
Safety Function	Safety Function assigned. Refers to Safety Function setup.
LifeBoat	Lifeboat assigned. Refers to Lifeboat Setup.
Muster Station	Muster Station location. Refers to Muster Station setup.
Safety Role	Safety role assigned. Refers to Safety Role setup
Safety Group	Safety Group assigned. Refers to Safety Group setup
Deck	Deck location. Refers to Deck setup.
Fire zone	Fire zone assigned. Refers to Firezone setup.

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Table 18-5 (Cont.) Field Description of Proposed Crew Grid

Field Name	Description
Stairwell	Stairwell location. Refers to Stairwell setup.
Side Location	Emergency Station location on board the ship. Refers to default system codes.
Craft Type	Type of Craft. Refers to default system codes.
Craft Side	Safety Boat location - port or starboard. Refers to default system codes.
Emergency Station	Station type. Refers to Muster Station Setup.

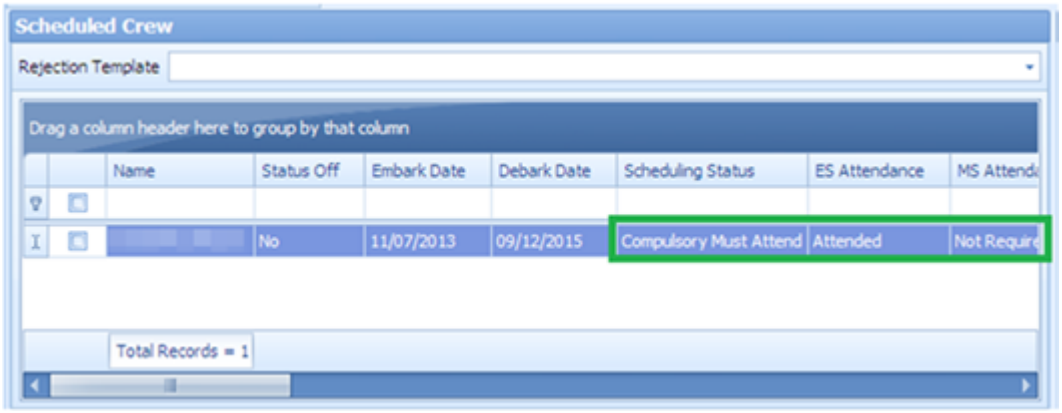
Unscheduling Crew from Drill

1. From the **Calendar** tab, select the **Drill Date**, and select the drill in **Schedule Drill** section.
2. Crew due for drills is populated in the **Proposed Crew** grid.
3. From the **Scheduled Crew** grid, select the checkboxes beside the name or click the **Select All Scheduled Crew** button at the ribbon bar, and click the **Proposed** button to unassigned. The selected crew name appears in the **Proposed Crew** grid.

Scheduling Crew to a Drill

1. From the **Calendar** tab, select the Drill date, and then select the drill in the **Schedule Drill** section.
2. Crew due for drills are listed in the **Proposed Crew** grid. From the **Proposed Crew** grid, select by checking the checkbox beside the name or click the **Select All Proposed Crew** button at the ribbon bar.
3. Click **Scheduled** to assign.
4. At the Scheduled Crew grid, the **Status Off** field defaults to *No*. Only crew members with disembarkation after the drill date haves the status set to *Yes*.

Figure 18-11 Drill Status In Scheduled Crew



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Table 18-6 Field Description of Scheduled Crew

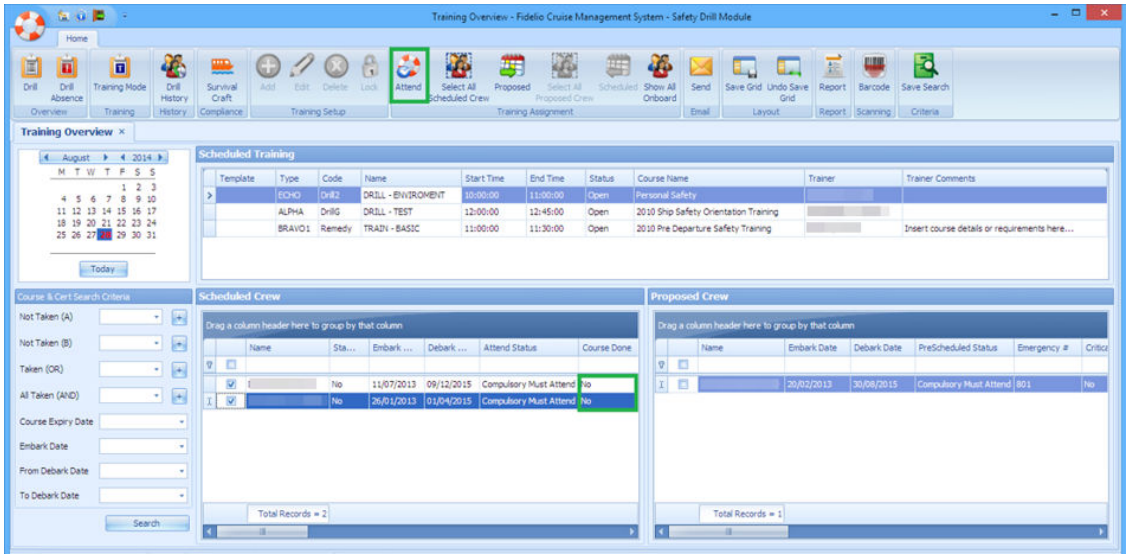
Field Name	Descriptions
Name	Crew name
Status Off	If the status is YES, this indicates that the crew disembarkation date is after the drill date.
Embark Date	Crew embarkation date.
Debark Date	Crew debarkation date.
Attend Status	Defines whether attendance is compulsory or optional. Refers to rules set in Safety Drill Type and Course and Certificate taken.
Course Done	Completed the scheduled course.
Emergency #	Emergency number defined in Muster List Setup
Critical E Number	Defines whether the course/certificate will auto expire after Critical E# is changed. Refers to Muster List Assignment.
Operational Position	Crew Operational Position. Refers to Crew Operational Position setup.
Safety Department	Safety Department assigned. Refers to Safety Department setup.
Safety Position	Safety Position assigned. Refers to Safety Position setup.
Safety Function	Safety Function assigned. Refers to Safety Function setup.
LifeBoat	Lifeboat assigned. Refers to Lifeboat setup.
Muster Station	Muster Station location. Refers to Muster Station setup.
Safety Role	Safety role assigned. Refers to Safety Role setup.
Safety Group	Safety Group assigned. Refers to Safety Group setup.
Emergency Station	Station type. Reference to Muster Station setup.
Deck	Deck location. Reference to Deck setup.
Fire zone	Fire zone assigned. Refers to Firezone setup.
Stairwell	Stairwell location. Refers to Stairwell setup.
Side	Location side of Emergency Station. Refers to default system codes.
Craft Type	Type of Craft. Refers to default system codes.
Craft Side	Safety Boat location - port or starboard. Refers to default system codes.
Side	Location of the Muster station - port or starboard.

Changing Attendance Status

The course attendance is marked by the trainer at the end of the training drill. This process also updates the **Course and Certificate** as completed in Crew Handling.

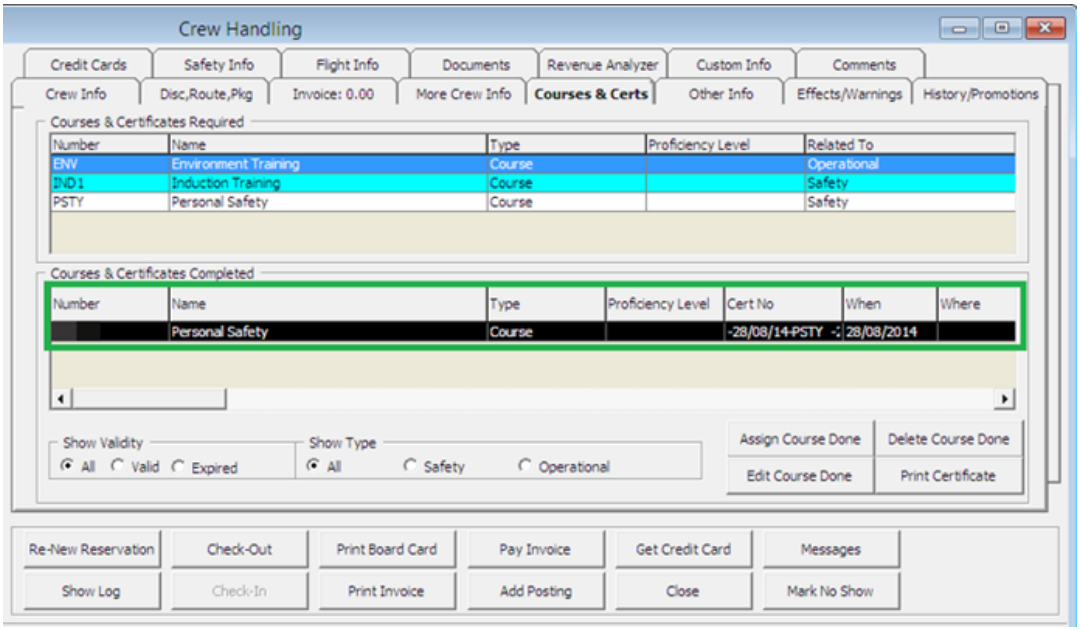
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Figure 18-12 Course Attendance Function



1. At the selected training drill, select the crew or click the **Select All Schedule Crew** button.
2. Click the **Attend** button to change the attendance status. This changes the **Course Done** status to **Yes**, and the **Attend** button at the ribbon bar switches to **Undo Attend**. It also sets the **Course and Certificate** as **Completed** in the Crew Handling window.

Figure 18-13 Course Attendance in Crew Handling



3. The system prohibit you from moving the crew from the **Scheduled** to **Proposed** window once the attendance in **Course Done** is set to **Yes**. You must first reset the status to **No**.
4. To reset the attendance, select the name and click the **Undo Attend** button.

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Sending Email Notification

An email notification can be pushed to the respective Operational Department, informing them of the scheduled drill date/time and the crew involved. The function requires configuration in **Parameter, Promo Group**, and **Operational Department**. The recipient must have an email account set in **Administration, Crew Setup, Operational Division**.

1. Click the **Send Email** button at the ribbon bar.
2. At the Send Email window, select the **Operational Department** from the drop-down list.
3. The system prompts two notifications: the first is a push notification to the Head of the Operational Department, followed by an email if sent successfully. Click the **OK** button on both prompts to continue.
4. If you receive a prompt stating *'SMTP Server requires a secure connection...'*, this means the SMTP is not set up correctly. Click **OK** to continue.
5. The recipients will receive an email with two Excel spreadsheets attached: **Master.xls** and **Schedule Details.xls**. See Training Drill Report for the sample spreadsheets.

Marking Attendance Using Barcode Scanning

You can mark the course attendance using a barcode scanner (referenced to 'RES_BOARDCC_EXT'), hardware set up is required in **Crew, Options, Hardware**. Contact Oracle Hospitality Cruise for hardware requirements and setup.

Training Drill Report

You can print and email a scheduled drill to the respective Operational Department for review and planning. This function exports the scheduled drill into a Microsoft Excel file that includes:

- **Master.xls:** Information pertaining to the scheduled training drill.
- **Scheduled Details.xls:** Names of the crew scheduled for training.
- **Proposed Schedule.xls:** Names of the crew proposed for training.

Printing Drill Report

1. Select the Training Drill Date from the Calendar tab.
2. Click the **Report** button at the ribbon bar.
3. Enter the destination path and click the **Save** button.

Figure 18-14 Sample Master Drill Report

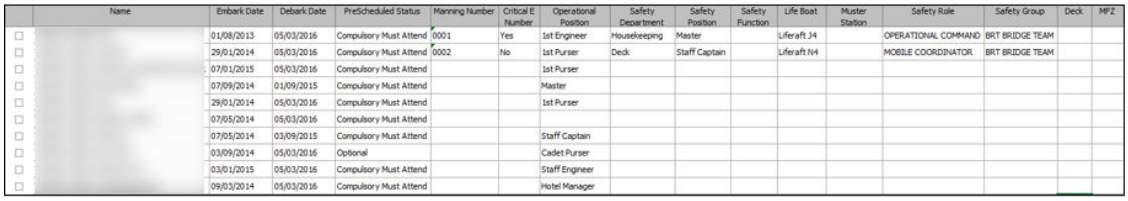
Template	Type	Code	Name	Start Time	End Time	Status	Course Name	Trainer	Trainer Comments
	SDR002	DR004	Drill - 004	05:00:00	06:00:00	Open	Basic Safety Training		

Figure 18-15 Sample Scheduled Drill Report

	Name	Status Off	Embark Date	Debark Date	Attend Status	Course Done	Manning Number @	Critical E Number	Operational Position	Safety Department	Safety Position	Safety Function	Life Boat	Muster Station	Safety Role	Safety Group
☐		No	29/09/2014	29/09/2015	Compulsory Must Attend	No			Staff Captain							
☐		No	03/01/2015	23/03/2016	Compulsory Must Attend	No										
☐		No	04/01/2015	03/01/2016	Compulsory Must Attend	No			Staff Captain							
	Total Records = 3															

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Figure 18-16 Sample Proposed Drill Report



Name	Embark Date	Debark Date	PreScheduled Status	Manning Number	Critical E Number	Operational Position	Safety Department	Safety Position	Safety Function	Life Boat	Muster Station	Safety Role	Safety Group	Deck	MPZ
	01/08/2013	05/03/2016	Compulsory Must Attend	0001	Yes	1st Engineer	Housekeeping	Master		Liferaft J4		OPERATIONAL COMMAND	BRT BRIDGE TEAM		
	29/01/2014	05/03/2016	Compulsory Must Attend	0002	No	1st Purser	Deck	Staff Captain		Liferaft N4		MOBILE COORDINATOR	BRT BRIDGE TEAM		
	07/01/2015	05/03/2016	Compulsory Must Attend			1st Purser									
	07/09/2014	01/09/2015	Compulsory Must Attend			Master									
	29/01/2014	05/03/2016	Compulsory Must Attend			1st Purser									
	07/05/2014	05/03/2016	Compulsory Must Attend												
	07/05/2014	03/09/2015	Compulsory Must Attend			Staff Captain									
	03/09/2014	05/03/2016	Optional			Cadet Purser									
	03/01/2015	05/03/2016	Compulsory Must Attend			Staff Engineer									
	09/03/2014	05/03/2016	Compulsory Must Attend			Hotel Manager									

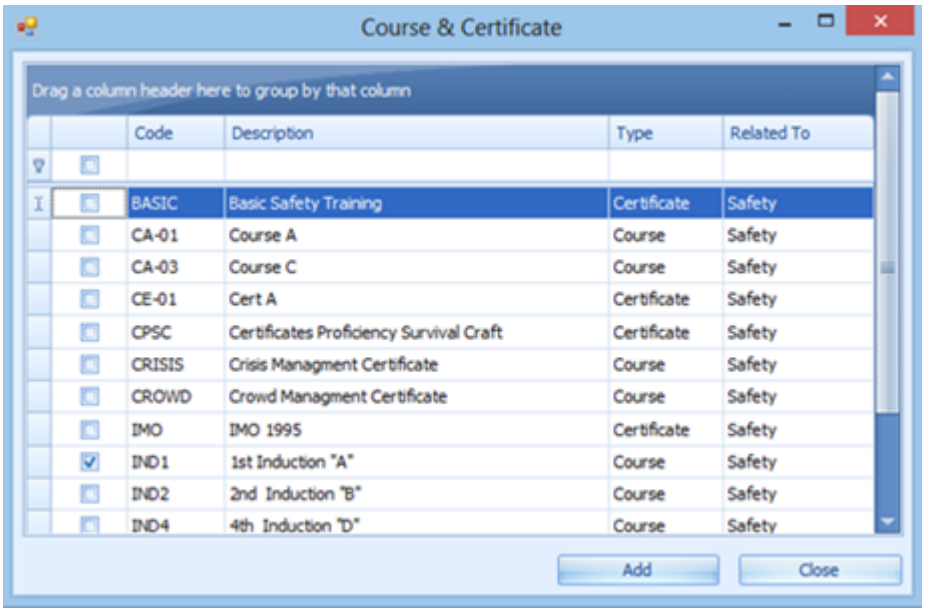
Information Look Up with Save & Search

The search function allows you to search for courses set up based on the selected drill type. You can save the searched information into a template for future use.

Searching for Crew by Course

1. Select one of the following options from the drop-down list on the left of the Training Overview window. The search results are based on the selected filter.
   - Not Taken (A)
   - Not Taken (B)
   - Taken (OR)
   - All Taken (AND)
2. To select more than one course type, click the **plus sign (+)** to open a detailed Course & Certificate window, select the Courses and then click **Add**.

Figure 18-17 Course and Certificate Selection in Search Filter



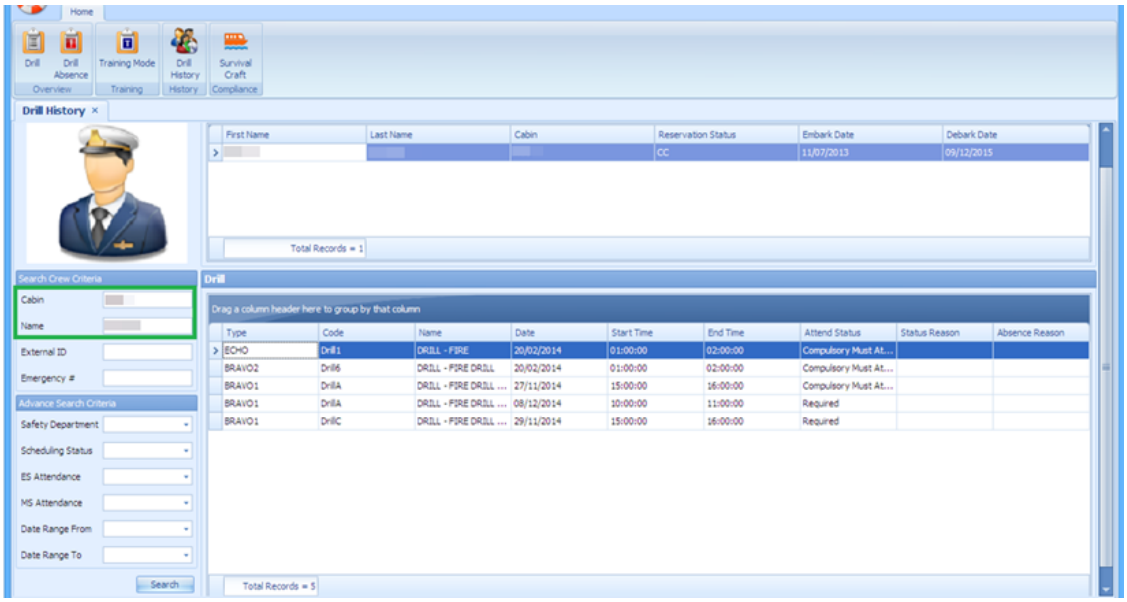
3. At the Course & Certificate Search Criteria window, enter the applicable filter and click **Search**.
4. To save the search filter as a template, click **Save Search** on the button at the ribbon bar.

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Drill History

The system stores a history of the scheduled drill and it allows you to search using a crew name and/or a cabin number. You can select more than one code using the **Advance Search Criteria** section.

Figure 18-18 Drill History Search



Survival Craft Compliance

The Survival Craft function enables you to excuse a crew from their commanding role on a lifeboat/raft. This exemption is only applicable to crew who have Safety Function assigned to their **#E Number** and have attended a specified course or certification.

These functions vary depending on the drill mode set up in the **Parameter group, Safety, Advance Safety Drill**.

Standard Safety Drill Functions

Before you proceed, check the following parameters and configurations:

- A parameter a specific course or certificate is required. See *Par_Group_Safety and Par_Group_Promo* in Parameters
- Safety Function code is assigned to the **Crew, Muster List** setup.
- The crew must complete the course/certificate that matches the Course for Boat Commander.

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Figure 18-19 Survival Craft Compliance

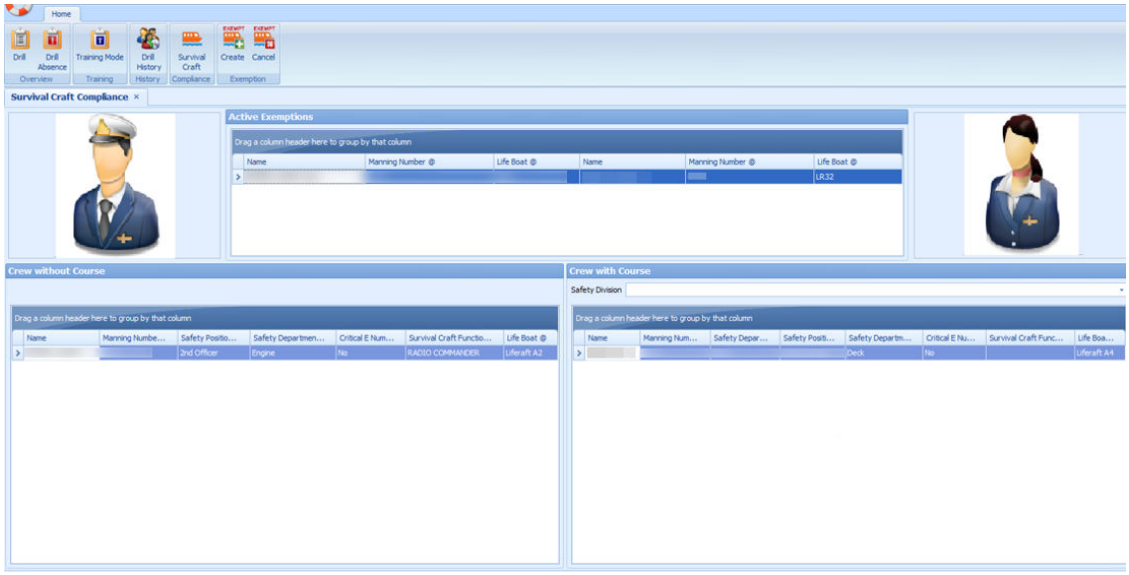


Table 18-7 Field Description of Crew With/Without Course In Survival Craft Compliance

Field Name	Descriptions
Name	Crew Name.
Emergency #	Emergency number defined in Muster List Setup.
Critical E Number	Defines whether course/certificate will auto expire after Critical E# changes. Refers to Muster List Assignment.
Safety Department	Safety Department assigned. Refers to Safety Department setup.
Safety Position	Safety Position assigned. Refers to Safety Position setup.
Safety Function	Safety Function assigned. Refers to Safety Function setup.
LifeBoat	Lifeboat assigned. Refers to Lifeboat Setup.

The Survival Craft Compliance functions are divided into three sections. The information displayed in each of the sections defines the task of the Crew.

- **Active Exemptions:** Displays the Crew exempted from its role.
- **Crew without Course:** This section lists all crew with the following criteria:
  - An Emergency# (E Number) is assigned in Muster List Assignment.
  - The Emergency# must have a Safety Function assigned.
  - The Safety Function must have Commander/2nd Commander enabled.
  - The Emergency# must have Medical Care (MCARE) course and certificate assigned.
  - The crew must not have an MCARE course and certificate assigned/expired.
- **Crew with Course:** This section lists all crew with the following criteria:
  - Has an Emergency# (E Number) assigned in the Muster List Assignment.

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- The Emergency# (E Number) is not necessary to have a Safety Function assigned.
- The Emergency# (E Number) is not necessary to have an MCARE course and certificate assigned.
- The Commander/2nd Commander must be disabled in Safety Function.
- The crew must have an *active* MCARE course and certificate assigned.

Figure 18-20 Survival Craft Function In Muster List Setup

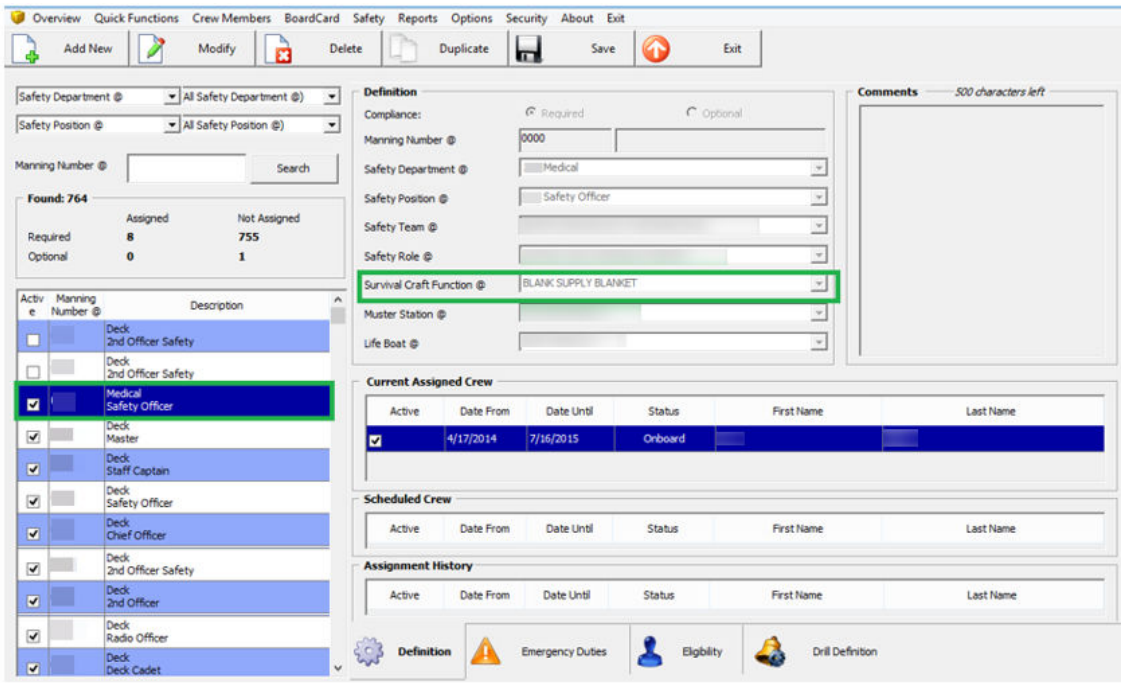
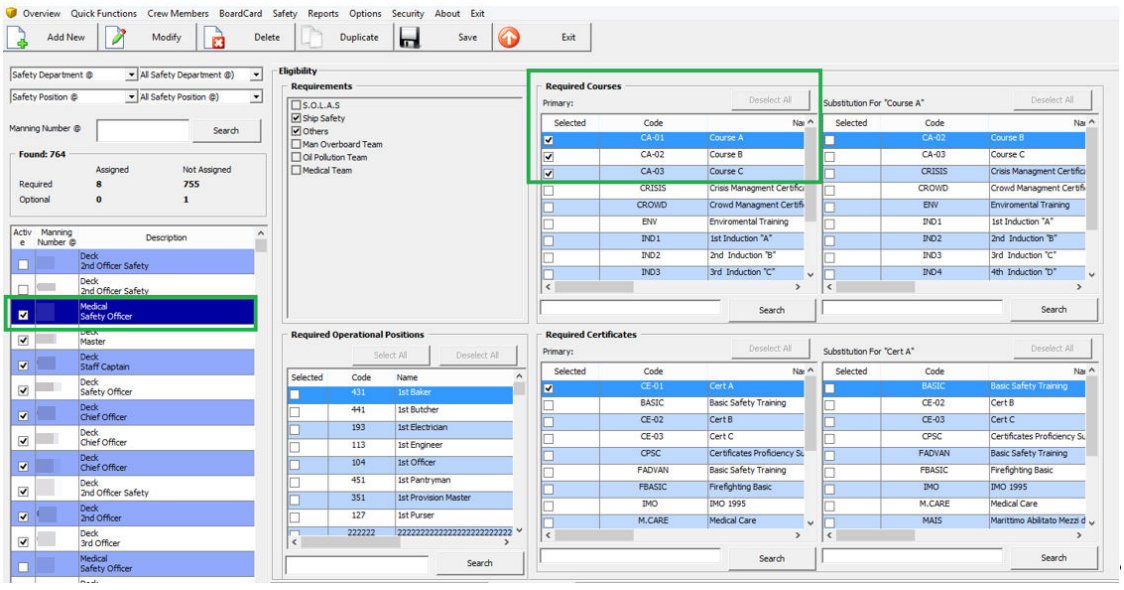
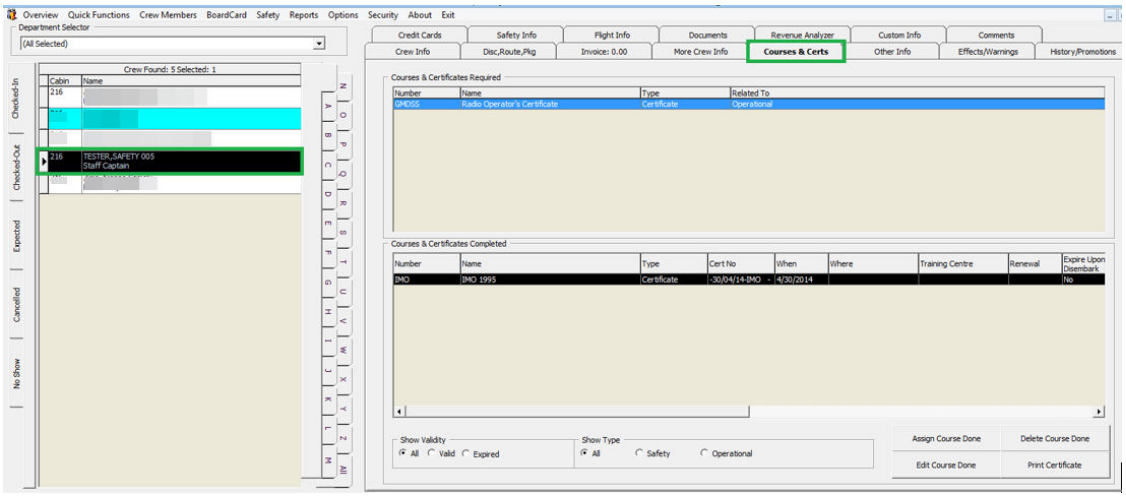


Figure 18-21 Required Courses Option in Muster List Setup



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Figure 18-22 Crew with Course and Certificate In Crew Handling



Creating an Exemption

Figure 18-23 Survival Craft Exemption

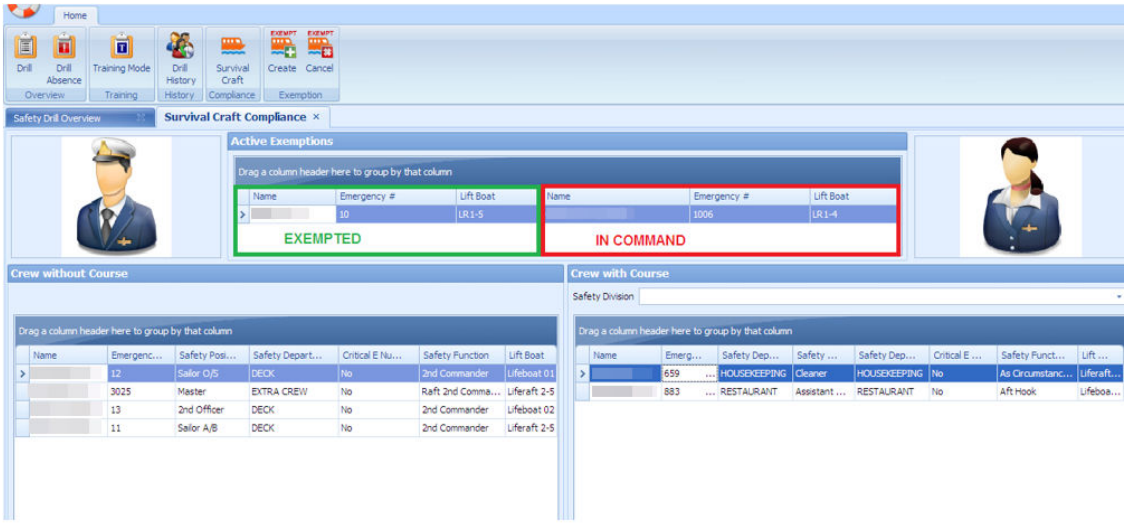
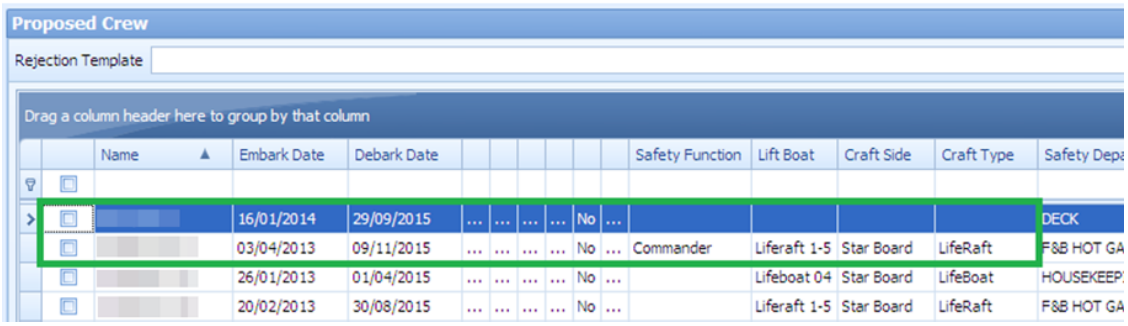


Figure 18-24 Proposed Crew List with Exemption

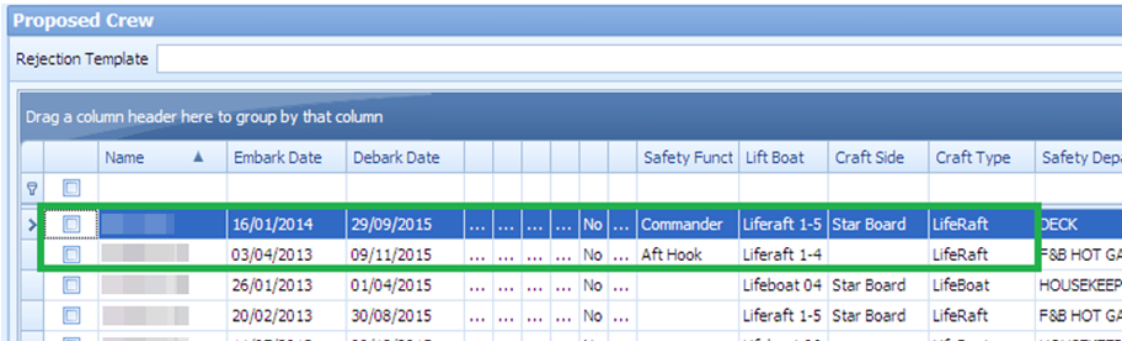


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1. Select a crew from each section - Crew with Course and Crew without Course.
2. Click the **Create Exemption** button. The name of the exempted crew is now shown in **Active Exemption** as illustrated in the figure below. The information displayed in **Safety Function**, **Lifeboat**, **Craft Type**, and **Craft Side** in the Safety Drill Overview changes when an **Exemption** is created.

Cancelling an Exemption

Figure 18-25 Proposed Crew List with Canceled Exemption

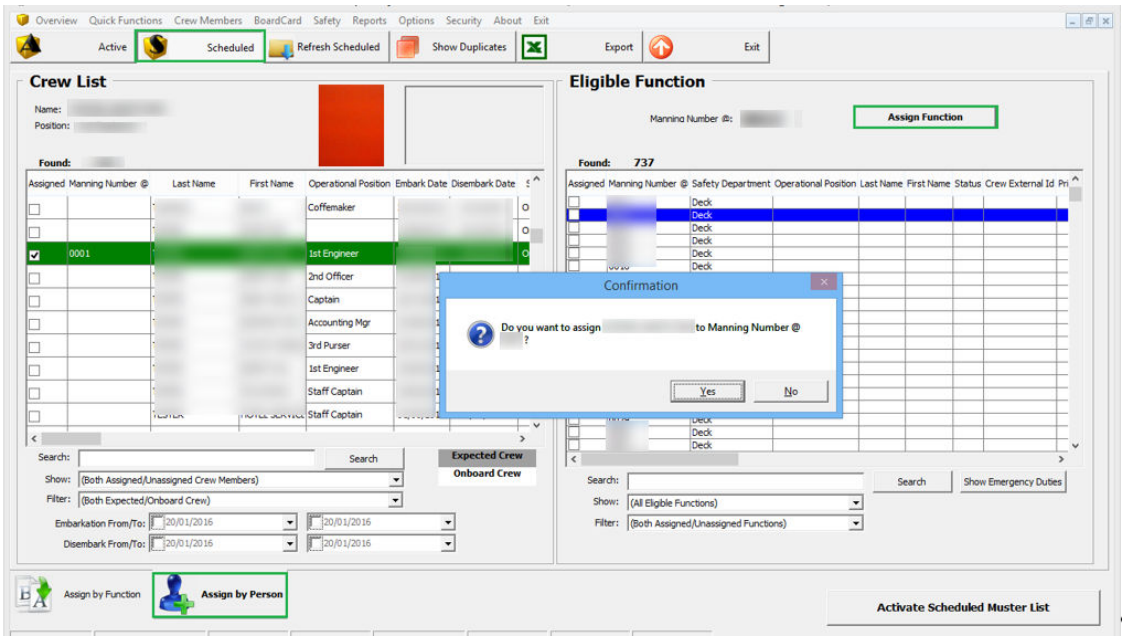


1. Select a name from the Active Exemption grid
2. Click the **Cancel Exemption** button. This resets the information shown in **Safety Function**, **Lifeboat**, **Craft Type** and **Craft Side** in the Safety Drill Overview to the initial arrangement when an **Exemption** is canceled.

Changing the #E Number

You can only change the crew **#E number** when the crew is exempted from **Survival Craft Compliance.**

Figure 18-26 #E-Number Assignment



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1. At the **Crew** module, select the **Safety, Muster List Assignment** from the drop-down list.
2. At the Muster List Assignment window, click the **Schedule** button from the menu bar and click the **Assign by Person** tab.
3. At the **Crew List** section, select the **Crew name**, and go to the **Eligibility** section.
4. Highlight the number and click the **Assign Function** button.
5. Click the **Yes** button at the confirmation prompt to change the **#E Number** or click **No** to exit without changing.
6. Click the **Exit**.

Crew Departure with Exemption

The system allows you to check out a crew with an *'Exemption'* status in the Survival Craft Compliance. It prompts an alert message at the check-out. You must remove the exemption first before checking out the crew. This restriction does not apply to the Gangway movement whereby a crew is allowed to go ashore or onboard.

During the creation of the exemption, columns **Survival Craft Function**, **Boat, Craft Type**, and **Craft Side** are replaced with **Commander,** if the crew has a Survival Craft Exemption.

Advance Safety Drill Functions

Before you proceed, ensure you have the following parameters and configurations set.

- A parameter a specific course or certificate is required. See *Par_Group_Safety and Par_Group_Promo* in Parameters.
- Safety Function code has Commander/2nd Commander selected.
- Safety Function code is assigned to Crew, Muster List setup.
- The crew completed a course/certificate that matches the Course for Boat Commander.

The functions of the Survival Craft Compliance in the Standard Mode or Advance Safety Drill Mode are identical, except the permission to change #E number and the Crew Departure with Exemption.

Changing the #E-Number in Advance Safety Drill

The system does not allow you to change the **#E number** from the Muster List Assignment for the crew that is exempted from Survival Craft Compliance. You must remove the exemption first before making any changes or you will receive an error prompts during check-out.

Crew Departure with Exemption in Advance Safety Drill

When you check out a crew that has Survival Craft exemption, an alert message "*Crew Member has Survival Craft Exemption. Are you sure you want to continue?*" shall prompt. If you select *Yes*, this will remove the exempted link and check out the crew. If you close the confirmation, the crew will remain checked in. Crew with exemption is not permitted to go ashore or onboard through the Gangway Security Gate.

User Security Access

This section describes the user security access group available to the Safety Drill module, and these security privileges are assigned in the **User Security** module.

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Table 18-8 Safety Drill Functionality Access Rights

Security Reference No	Description
4601	Fire Zone Definition.
4602	Stair Well Definition.
4603	Drill Location Set Definition.
4604	Access to Other Safety Department If the user does not have a crew link and access right 4604 assigned, or user with crew link and position does not match the Muster station assignment, the user is not allowed to view the drill in Drill Definition Setup in Administration module and Scheduled Drill in Safety Drill module. If the user has a crew link and access right 4604 assigned, and the crew assigned muster station matches the Muster station in Drill Definition: • The user is only allowed to view drills with the same Muster station assigned. • The user is only allowed to add drill(s) to the same Muster station assigned.

Parameters

This section describes the **Parameters** available to the Safety Drill module, and they are accessible from **System Setup, Parameters, Administration**.

Table 18-9 PAR_Group: Safety

PAR Name	PAR Value	Description
Advance Safety Drill	0 or 1	0 - Standard Safety Drill Handling. 1 - Advance Safety Drill Handling.
Course Code for Boat Commander	XXX	Qualifying course for Boat Commander. (XXX=COU_CODE)
Allow Multiple Safety Number Assignment	0 or 1	0 - Do Not Allow Multiple Safety Number Assignment. 1 - Allow
Allow to use special In Port Manning handling	0 or 1	0 - Disallow 1 - Allow
Auto Set Ashore Denial During Drill Scheduling		Specifies the duration before a Drill starts that going ashore is denied. Duration in minutes.
Display Valid Courses On Muster List Assignment		Displays the list of important courses on the Muster List Assignment window. PAR_VALUE should contain COU_CODE separated by commas. For example: 331,321.

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Table 18-9 (Cont.) PAR_Group: Safety

PAR Name	PAR Value	Description
Operational Position that Receive Message		The crew of certain operational position to receive a warning message in Active Muster List when there is expected crew in the muster list.

Table 18-10 PAR_Group: Promo

PAR Name	PAR Value	Description
SMTP Server IP Address	Enter the Local Exchange server IP Address	SMTP Server IP Address.
SMTP Server IP Port		Default SMTP IP Port is 25.
SMTP Server Require Login Authentication	0 – No or 1 - Yes	SMTP Server Require Login Authentication.
SMTP User Name	<userName>	Only valid when SMTP Server Requires Login Authentication is = 1.
SMTP User Password (Encrypted)	<userPassword>	SMTP User Password.
Sender Name	<senderName>	Sender Name.
Sender Email	<emailAddress>	Sender Email.

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19

WPF Security

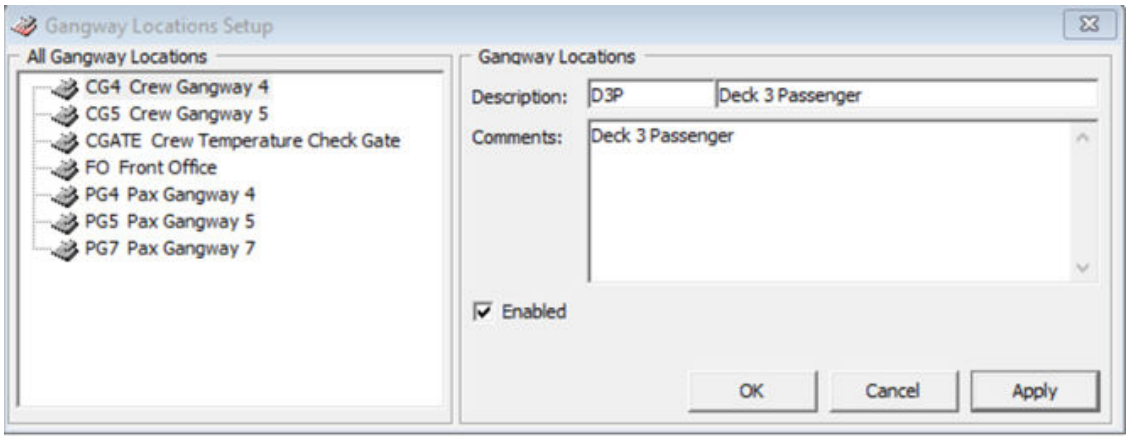
The Ship's gangway serves as the primary point for passengers to embark/disembark the ship, undergoing security verification. This module monitors the movement of passengers, crew, or residents at the gangway, ensuring an accurate head-count onboard or ashore during embarkation and disembarkation. It includes a security feature that notifies Security Officers if a passenger with denied ashore status attempts to disembark.

System Configuration

The Ship operator is responsible in preparing a list of the gangway locations on-board and the location of the workstations set up to run the WPF Security. Setting up multiple workstations in different locations is permissible, for example, workstation to manage passengers and another for crew at the same deck location. All of the configurations are coded in the Administration module.

Gangway Location

Figure 19-1 Gangway Location Setup



1. Log in to the **Administration** module and select **Safety Setup, Gangway Locations** from the menu.
2. On the All Gangway Locations pane, right-click and select **Add New**.
3. At the **Description** field, enter the gangway location code and name, and additional comments about the location if any.
4. The new code is enabled by default. To disable, deselect the **Enabled** checkbox.
5. Click **Apply** to save the new record.

Labels Setup

The program is pre-configured with a set of labels for use in WPF Security and you can modify the description to suit the ship's operation. The labels are listed in the following groups.

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- GNG001 - GNG115
- IMSG01 - IMSG03
- INIC01
- ODCT01
- ODMS01
- OMSG01 - OMSG03

1. Navigate to **Administration, System Setup, Labels Setup**.
2. Select a label code to modify.
3. Change the label description besides the short code and leave the Comments field as it is.
4. Click **OK** to save.

Security Sound File

A sound file is added to the Gangway location as an alert on the different types of Guardian movements alerts. The sound file format supported is .wav and mp3.

1. Log in to **Administration module** and select **Administration, Multimedia File Maintenance** from the menu.
2. Navigate to the **Security Sound File** tab and click **Select** to select the sound file for each of the alert types. This opens Window File Explorer. Locate the sound file and click **Open** to select the file.
3. To remove a sound file, click **Remove** on the selected sound file or **Play** to play the file.
4. Repeat the steps above for the remaining alert types.

Security Alert Setup

You can set up additional alerts to warn security officers of a potential security breach. Alert setup is in the **Administration module, Security Alert Setup**.

However, you must first define and create the Security Alert in the database using a script. Contact Oracle Customer Support for the script file.

1. Run **Administration** module and select **Administration, Security Alert Setup** from the menu bar.
2. In the **Details** tab of the **User Definable Security Alert Setup** window, enter the alert context in the **Name** field.
3. Enter the alert message text in the **User Define Alert Message** field.
4. In the **e-Mail Setup** section, select an **e-Mail alert template** and enter the email address using a semicolon **(;)** as a separator when inserting more than one e-mail account.
5. Select the **Direction Checking, Process Type** and **Gangway Type** from the drop-down lists.
6. Select the respective alert triggers and click **Add Audio** to add a sound file.
7. Navigate to the **Oracle SQL Statement** tab to view the SQL statement for that alert.
8. Click **OK** to save the setting.

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Peripherals

Peripherals such as camera, passport reader, or card printer are often hooked up at the gangway workstation to capture live pictures, record travel documents, or print the board card. To configure, see *Management module, Options, Hardware Setup*.

Parameters

This section describes the Parameters available to WPF Security.

Table 19-1 Parameters

PAR Name	Description
Allow Auto Status Change for Last Account	Allows auto change of last account status by pressing CTRL+S. 0 – Do not allow. 1 – Allow the auto Change.
Allow Mark Message as Delivered	0 – The message will not mark as delivered. 1 – Prompt user to confirm marking the message. 2 – The message are marked as delivered when prompted.
Allow offline expected embarkation today on board	This is use in conjunction with Advance Quick Check In Module offline mode. 0 – Disable 1 – Enable
Auto Refresh People Count	Enabling this parameter impacts the performance, it is disable by default. 0 –Disable else set number of second to refresh the people count.
Allow Crew Card Login Bypass	Allows crew to login by scanning the crew card provided the credential is valid in Mobile Database.
Allow not expected guest to check-in	0 – Do not allow expected guest to check-in. 1 – Allow not expected guest to check-in.
AutoCheckOutCrw	Auto check out crew after card swipe for going offshore. 0 – Disable. 1 – Enable.
AutoCheckOutPax	Auto check out passenger after card swipe for going offshore. 0 – Disable. 1 – Enable.
Check Document Returned	Flag to check whether the pax document is returned during gangway movement. 0 – No checking. 1 – Check disembark pax document. 2 – Check transit and disembark pax document.
Check Message	0 – Disable message checking 1 –Enable.

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Table 19-1 (Cont.) Parameters

PAR Name	Description
Check Visitor Card	0 – No checking performed. 1 – Check on the validity of visitor card.
Check-in Message Popup Duration	Number of milliseconds the auto check in message is shown.
Check-in via OHC Security	0 – Disable check in via OHC Security. 1 – Enable.
Custom SQL to show additional info for crew	N/A
DCL corporate card facility code	Null –Accepts all cards; card must match the facility code
Default Queue Workstation	Default chips workstation ID. Reference to TYP_QST.
Disable Search Grid Drag/Drop	Disables the ability to rearrange columns using drag/drop.
Disable Visual Keyboard	Disables the display of the visual keyboard.
Disable/Enable Phone when pax shoreside/ onboard	Allows phone to be disabled/enabled when passenger goes ashore or onboard.
Eliminate OHC Security Login	When enabled, it eliminates the OHC Security Log-ins when Disabling Cards. 0 – Disable. 1 – Enable.
Enable Auto Quick Balance	1 – Enable Auto Balance for guest with credit cards Register.
Enable Handicap Assignment	0 – Disable. 1 – Enable Accessibility Assignment.
Enable Immigration Gate	0 – Disable the access to Immigration Gate. 1 – Enable.
Enable Internal Gate	0 – Disable the access to Internet Gate. 1 – Enable.
Enable Minor Disembarkation Authorization	0 – No Authorization is required for minor. 1 – Authorization of Guardian company is required.
Enable Tender Option	0 – Disable Tender Option. 1 – Enable option for Gangway to serve tender.
Exclude Port from Minor Dis Authorization	Specify the ports of call a minor is authorized to debark un-escorted. For example 'AtSea','AtSea1'
Exit Application Without Prompt Password	1 – Exit Application Without Prompt Password.
Extended Search Criteria	It can be any VarChar2 or Char field from RES and UXP table.
Extended Search Criteria Check-in	0 – Extended Search Criteria at gangway is disabled. 1 – Passengers will be checked in when found. 2 – Passengers will be allowed onboard but not checked in.

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Table 19-1 (Cont.) Parameters

PAR Name	Description
Gangway Location Functionality	The value determine whether to prompt the Gangway Location window at logon. 0 – Not used. 1 – Used.
Grid Font Size	Specifies the Font Size in the Search Grid.
Grid Refresh Duration	Number of seconds to auto-refresh the Grid data.
Picture Taking Functionality	0 – Disable picture taking functionality. 1 – Enable.
Prompt Message When Crew Disembark Today	1 – Prompt Message when Crew Disembarks Today.
SLD Manual Override	Prompts a message to override “shore leave denied” age if no Time and Attendance validation. 0 – No overriding. 1 – Prompt override SLD message.
Show Check-in Cabin Person Count	0 – Do not show other guest. 1 – Show other guest.
Show Other Guest with Same Booking Number	0 – Do not show other guest. 1 – Show other guest.
Tender Threshold Count	Threshold Count that triggers a warning.
Update Visitor Name	0 – Do not overwrite. 1 – Overwrite existing visitor name during passport scanning.
Use Ashore Denied Message	0 – Do not use denied message in Ashore/ Onboard Denied function. 1 – Use.
Use ON/OFF Icon	0 – Do not use on/off Icon. 1 – Use On/Off Icon.

Accessing WPF Security

The WPF Security login window can display the type of Gate and Traffic direction according to the ships operational needs. This is determined by the **Exit Application Without Prompt Password** and **Gangway Location Functionality** parameters.

1. Begin the WPF Security application and at the Gate Settings dialog box, select the type of **Gate, Traffic Direction,** and **Gate Location**.

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Figure 19-2 WPF Security Gate Settings

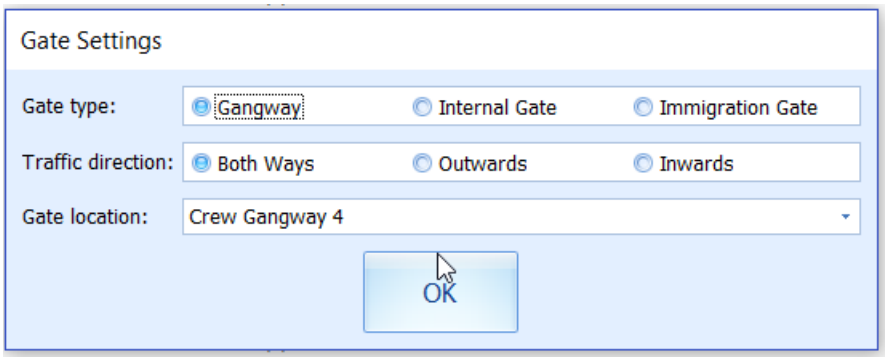


Table 19-2 Gate Settings Type

Gate Type/Direction	Description
Gangway	The Gangway gate is used by passengers and crew when boarding/alighting the ship. The system maintains a running count of passengers and crew that are currently onboard and at shore side.
Internal Gate	The Internal Gate is used by Department Head/Training Manager to monitor the crew training attendance and movements in restricted area or shore duty. The in/out entries through the gate are updated except the shipboard status.
Immigration Gate	The Immigration Gate is used to facilitate the immigration process by swiping the passenger's board card in and out for Immigration inspections. The Immigration information is updated except for shipboard status.
Both Way	Used for passengers and crew going ashore and coming on board.
Outwards	Used for passengers and crew going ashore only.
Inward	Used for passengers and crew coming onboard only.

2. Click **OK** to access the main menu.
3. At the **Login** prompt, enter the user name and password or click **Exit** to access the Main menu.
4. The selected gate, traffic direction and location appear below the toolbar of the main window. Clicking the **Close Program** prompts a Security Logon dialog box. You must enter your login credential before you can close the program. You can disable the dialog box by setting the **Exit Application Without Prompt Password=1** parameter.

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Figure 19-3 WPF Security Toolbar



Navigating through WPF Security Main Functions

As the program predominantly records passenger movement through the gangway, the functionality in this program is scaled down to minimize the queue from building up. The functions in this module are a Refresh Count, Gangway Log, Visitor and Accessibility Handling, Immigration Gate handling, and others.

Figure 19-4 WPF Security Main Functions



Table 19-3 Field Description of WPF Security Main Functions

Function	Description
Refresh Count	Recalculates and updates the total counts of the Account Statistics Board.
Gangway Log	Starts the Gangway Log window, which allows the Security Officer to view or search the gangway activities when necessary.
Visitor	Starts the Visitor window and enables the Security Officer to enter the visitor's information, produce a visitor card, and track the visitor onboard/ashore status.

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Table 19-3 (Cont.) Field Description of WPF Security Main Functions

Function	Description
Accessibility	Allows the Security Officer to assign an accessibility status for passenger with disabilities who comes onboard.
Take Picture	Allows the Security Officer to take the picture and store the picture of a selected account in the system.
Close Program	Closes the WPF Security program.
Account Status Board	
Onboard	Total Passenger/Crew/Resident currently on-board the ship.
Shoreside	Total Passenger/Crew/Resident currently at shore.
Overnight Tour	Total Passenger/Crew/Resident currently on shore for overnight tour, which includes Crew accompanying passengers for overnight tour.
Expected	Total number of Passengers/Crew/Residents expected to check in today.
Disembarked	Total Passenger/Crew/Resident disembarked today.
Disembarking	Total PassengersCrew/Residents expected to disembark today.
Visitor Onboard	Total number of Visitors currently onboard.
Information Board	
Onboard / Ashore	The Onboard or Ashore Information board shows the account information by name, sex, nationality, photo, last event log, and other information when someone goes onboard from shoreside. Double clicking the board will show the account, allowing the Security Officer to search and change account status from onboard to ashore.
Gangway History Activity	
Gangway History Activity	Displays the last 10 movement activities with account name and photo.
Status Bar	
Ship	Current Ship’s name.
Sys Date	Current Ship’s SPMS system date.
PC	PC name of current gangway workstation.
DSN	SPMS Database name.
Reader	Card reader device currently connected to the gangway workstation.
CO Guest Enabled	Denotes “Gangway”, “AutoCheckOutPax” parameter is enabled, allowing you to check-out a passenger account by swiping the board card.

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Table 19-3 (Cont.) Field Description of WPF Security Main Functions

Function	Description
CO Crew Enabled	Denotes “Gangway”, “AutoCheckOutCrw” parameter is enabled, allowing you to check-out a crew account by swiping the board card.
Light bulb image	Database connectivity status. Green denotes online, and Red denotes offline.

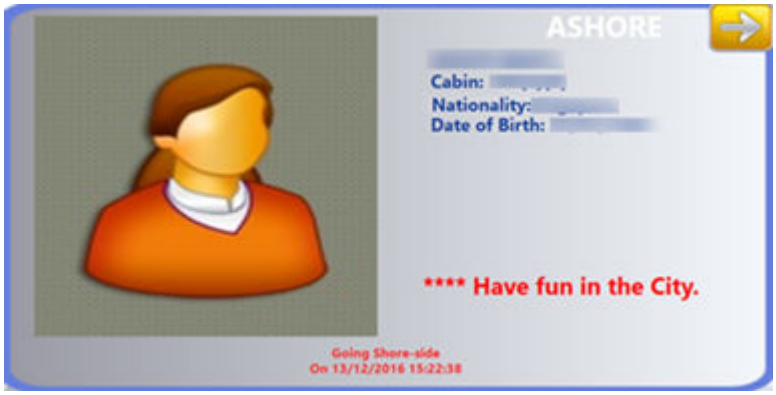
General Handling

Changing Onboard/Ashore Status

When passengers/crew pass through the Security Gate to go ashore or board the ship, they are required to either swipe, scan, or tap their board card on the devices made available at the security gate. Once the board card is swiped, the account status changes from onboard to ashore or vice versa.

Alternatively, you can manually change the status using the account search. The Security Officers typically perform this process for passengers who lost their board card while on shore.

Figure 19-5 Account Information Tile



1. From the main window, double-click the **Onboard** or **Ashore Information Board** to bring up the list of accounts.
2. In the **Show People Currently Onboard / Shore-Side list** panel, use the side scroll bar to search for the account or filter the search by category.
3. Place the cursor in the Search text box launch the On-Screen Keyboard (OSK) and enter the passenger’s name or cabin number,
4. Select the account from the account grid and click the **Going Ashore** or **Going Onboard** icon on the ribbon bar to change the account status or double-click the name field.
5. At the Confirmation prompt, select **Yes** to proceed or **No** to return to previous window. If you select Yes, the account information appears in the Ashore Status or vice versa.

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Auto Check-In Guest

Apart from scanning and recording the passengers movement at the Security Gate, you can also check in embarking guests. This function requires the following parameters. See Parameters for more details.

- Check-in through WPF Security
- Enable CheckIn Message
- Check-in Message Pop-up duration

> **Note**
>
> If the **Enable CheckIn Message** parameter is enabled, the system prompts you to confirm the check-in and indicates the duration to process the check-in base on the value defined.

1. At the Main Window, swipe the expected checked-in passenger's card through the Magnetic Stripe Card Reader (MSR).
2. At the Check-in dialog box, select **Yes** to check-in the guest. The passenger's details appears on the Onboard Information Board.

Auto Check-Out Guest

The application can automatically check out passengers at the gangway. This requires some Parameter setup. See Parameters for details.

1. In the Main Window, swipe the expected check-out passenger's card through the Magnetic Stripe Card Reader (MSR).
2. At the Check-out dialogue message, select **Yes** to check-in the guest. The passenger's details appears on the Ashore Information board.

Crew Disembarkation Handling

Similar to Auto Check-Out Guest, the function is also available to crew disembarking from the ship. See Parameters section for details.

When disembarking crew swipe their board card through the MSR. The system prompts an **Ashore Denied Override** dialog box with the following message: 'The person is ashore denied; do you want to override the onboard status?'. Click **Yes** to change the account status to **Ashore** and display a "Crew Disembark Today" statement on the Ashore Status Information board.

Message Handling

You can set up an alert to prompt messages entered in the Management module that are marked for delivery at the gangway. This function requires Parameter settings. See Parameters section for details.

The system prompts an alert on the WPF Security window at the point when the passenger swipes, scans, or tabs their board card on the card reader devices, allowing the Security Officer to read out the message to the passenger. Click **Yes** at the message sets the message as *Acknowledged* in the system.

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Onboard/Ashore Denied Handling

There are reasons the passenger or a crew is denied from boarding or leaving for shore, and below are examples.

- Travel document not collected when disembarking.
- Account has an Open Balance.
- Passenger or crew is denied to go ashore or onboard due to safety reason, port regulations, and others.
- A visitor is denied to go onboard.

In the following section, when the disembarking passenger/crew swipes the board card through the MSR, the system sounds an alert and prompts a dialog box. Click **Yes** to override the onboard status. All of the functions listed below are triggered by the parameters defined in the Administration module. See Parameters section for list of available parameters.

Document Return Handling

At the end of the cruise, disembarking passengers must collect their travel documents from the Front Desk before leaving the ship. An alert message appears for the Security Officer as a reminder to passengers to collect their travel document before final disembarkation. See the following image:

Figure 19-6 Document Return Notification Prompt

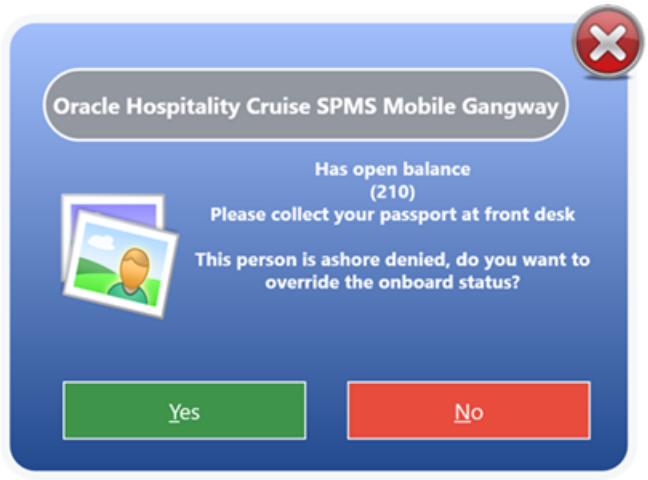


Open Balance Handling

Similar to Document Return Handling, the system prompts an alert when a disembarking passenger's account has an open balance with the balance amount indicated on the dialog box.

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Figure 19-7 Open Balance Notification



Ashore Deny List Handling

This alert appears when passengers or crew are listed on the denied list in **Management, Deny Ashore List**. You can add a reason why they are denied to go ashore in the comment field. Refer to *Management User Guide, Ashore Deny List* to setup the list.

Figure 19-8 Ashore Denied Notification

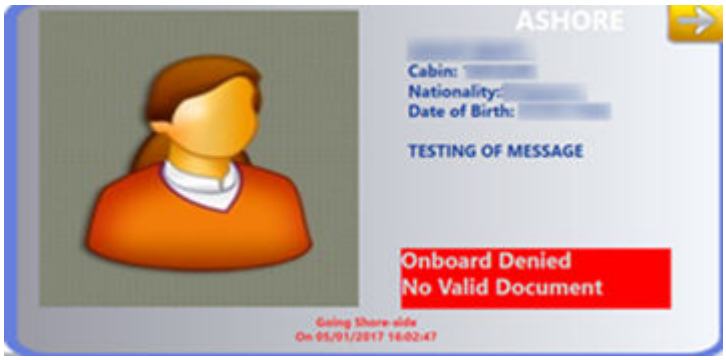


Additionally, when a crew member is given a disciplinary action, the individual can be denied permission to go ashore based on the period indicated in the disciplinary form in the **Crew Handling, Effect/Warning tab, Warning** form.

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Onboarding Denied List

Figure 19-9 Onboard Denied Notification



There are occasions when passengers, crew or visitors are denied to go onboard the ship. This is could be due to invalid travel document, the assigned board card has expired, or assigned to shore duty.

Alerts are defined in the passenger/crew account in **Management, Edit Guest Information, Deny Reason** or the **Deny Boarding** field. Refer to *Management User Guide, Guest Handling, Edit Information* for further details.

Security Alert Handling

Figure 19-10 Security Alert Notification



The Security Alert handling notifies the Security Officer according to the potential security breach defined in **Administration, Security Alert Setup**, enabling security personnel to act according to the ship's policy. For the following example, a minor below x age is not permitted to go ashore without a guardian, and the alert is set off when the minor swipes his/her card on the MSR.

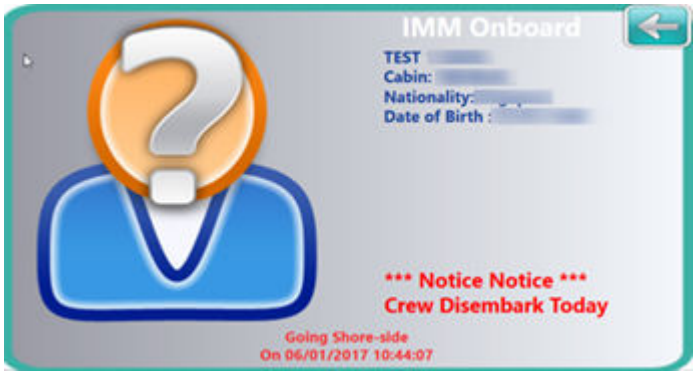
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Immigration Gate Handling

The Immigration Gate Handling is used in some countries to facilitate the Immigration clearance at checkpoints according to Immigration Rules.

Setting up Immigration Gate

Figure 19-11 Immigration Onboard Status



When the WPF program is launched, the Security Officer must determine the location of the checkpoint, gate type and the traffic direction. See section Accessing WPF Security for gate type.

The passenger and crew are required to either swipe, scan, or tab their board card on the card reader when passing through this gate, with IMM Onboard or Ashore indicated on the Account Information board.

Resetting the Immigration Gate Status

A status reset is performed at the end of each Immigration clearance check. The user assigned to perform this task must have the privilege, *#685 – Reset Immigration Counter*, assigned.

1. At the end of the Immigration clearance check, click the **Reset Immigration** button at the Toolbar of the application main window.
2. Once logged in, at the confirmation dialog box click **Yes** to proceed or **No** to abort.
3. A prompt shows “Immigration reset done” when the reset is successful.

Internal Gate Handling

The Internal Gate function is used to manage the crew training movements or assigned duties at restricted areas or shore duty.

When the WPF program is launched, Security Offices must determine the location of the gate, gate type and traffic direction. See section Accessing WPF Security for gate type.

Crew members passing through the gate must either swipe or scan their board card when entering or leaving the training session. The movement is shown on the Account Information board with INT Onboard or INT Ashore, depending of the type of movement.

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Special Need Handling

A special needs passenger requiring assistance while on-board is assigned an accessibility code when making a reservation. There are occasions when the passenger's information is not up-to-date and is added on an ad-hoc basis at the Security Gate. In order to update the accessibility code on an ad-hoc basis, the codes must be pre-configured in the Administration module and made available for use in WPF Security.

1. When special needs passengers swipe their board card on the Magnetic Swipe Card Reader (MSR), click the **Accessibility** button at the Toolbar. This launches the Accessibility Status Assignment dialog box.
2. At the dialog box, select a special needs code from the list by checking the **Mark as Accessibility** radio button and clicking **Save**.
3. To deselect, mark the special needs code and click **Mark as Accessibility** before clicking **Save**.

Gangway Log

The system records all movements through the Security Gate by date, workstation, location, name, movement direction, account type, cabin number, and user name. These entries can be exported to a text file, report, or Microsoft Excel sheet.

Figure 19-12 Gangway Log

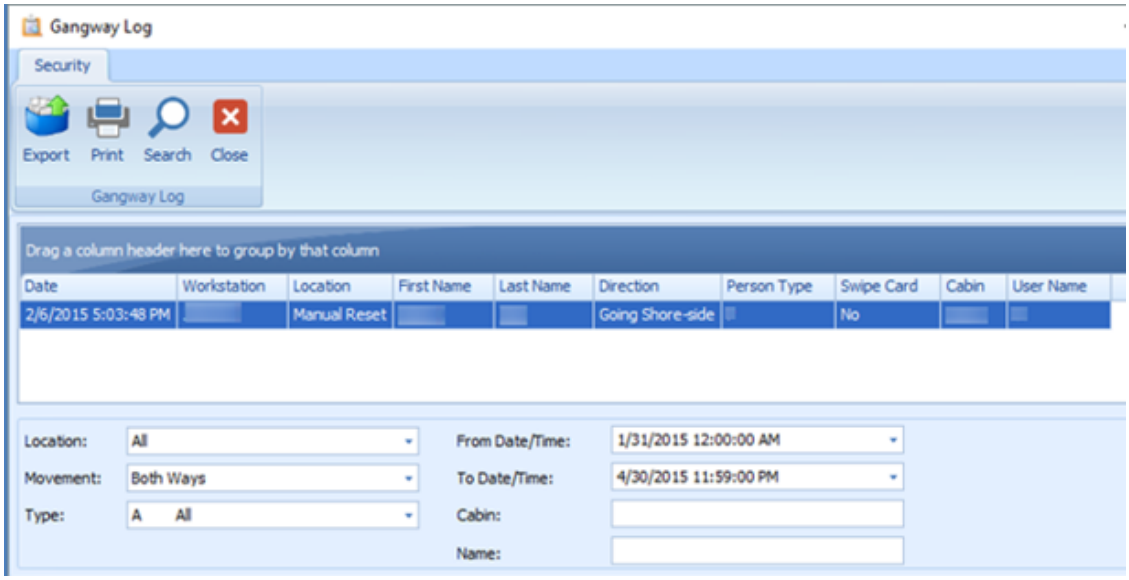


Table 19-4 Gangway Log Search Option

Search Criteria	Description
Location	Gangway location setup in Administration, Gangway Locations.
Movement	List of direction of the movement.

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Table 19-4 (Cont.) Gangway Log Search Option

Search Criteria	Description
Type	Account Type: A – All. P – Passenger. C – Crew. V – Visitor.
From Date	Start date of the search.
To Date/Time	End date of the search.
Cabin	Cabin Number.
Name	Name of the person you want to search.

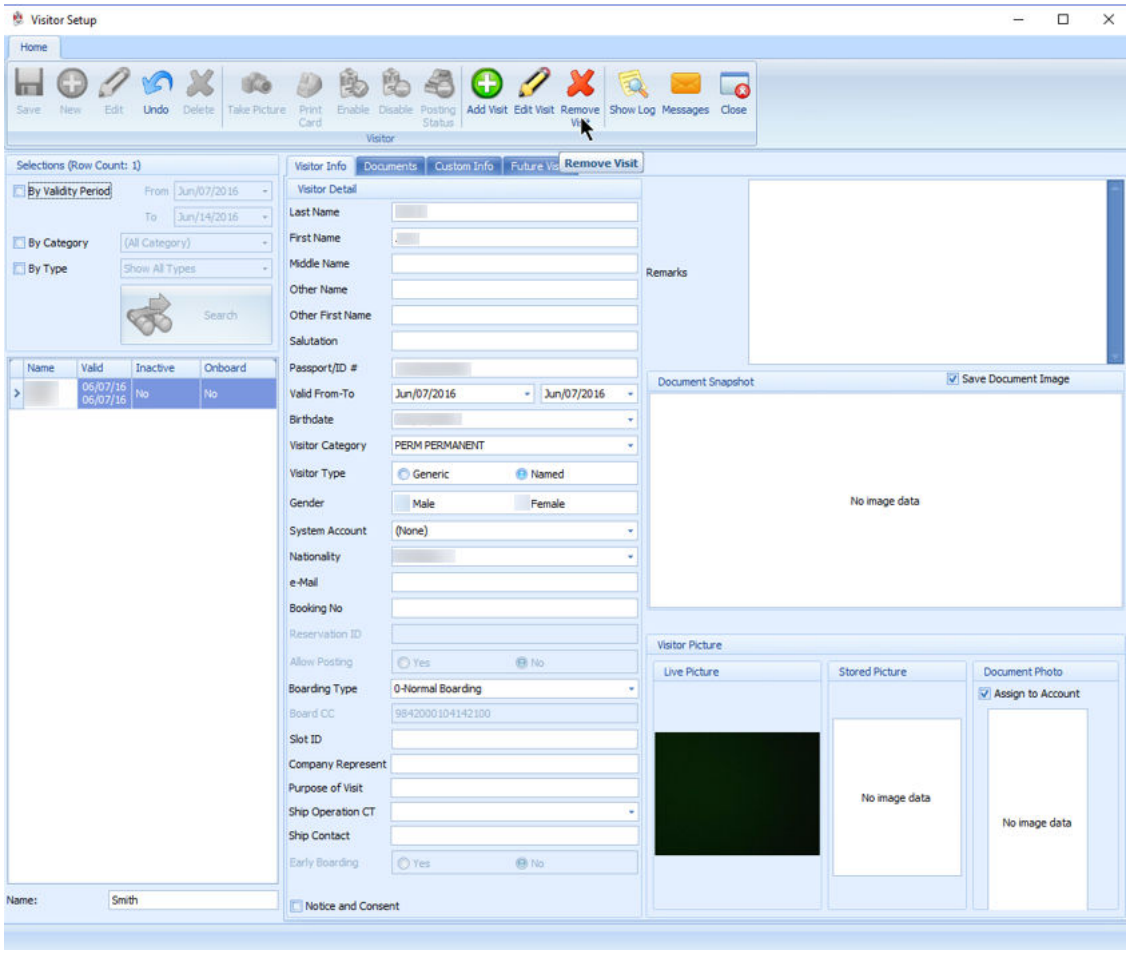
1. At the WPF Security Toolbar, click the **Gangway Log**. This prompts for a re-login.
2. At the Gangway Log window, select the type of information to export/print using the drop-down list.
3. Click **Search** at the ribbon bar to populate the information onto the grid.
4. You can sort information shown on the grid by the header name, by clicking the column name, or right-clicking the header to bring up the customizable sort option.
5. Click **Print** to print the report or click **Export** to export the report template to another format.
6. Click **Close** to exit the Gangway Log window and return to the WPF Security main window.

Visitor Handling

All visitors going on-board or leaving the ship must register at the security checkpoint, unless prior registration is performed in the Advance Quick Check-In module.

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Figure 19-13 Visitor Registration Form



Visitor Registration

1. At the WPF Security main window, click the **Visitor** icon on the Toolbar to open the Visitor Setup form.
2. At Visitor Setup form, click **New** to add a new visitor record and fill in the details in the Info tab.
3. At the ribbon bar, click **Take Picture** to capture a live picture. Ensure a camera is attached to the workstation and the device is correctly setup in *Management, Option, Video* parameter.
4. Click **Swipe Passport** on the ribbon bar to open the ATB Document Entry form, then scan the passport through the passport reader and click **OK** to save.
5. Click **Print Card** to generate a visitor board card. This function starts the Batch Board Card Printing if the card fails to print.
6. Select the **Notice and Consent** checkbox located next to the Name Search field. If this checkbox is deselected, the system prompts a warning message and disallows you from proceeding.
7. Click **Save** to save the visitor record.

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Editing Visitor Record

1. At the Visitor Setup window, search the visitor record using the filters or enter the last name in the name search field.
2. Click **Edit** on the ribbon bar.
3. Edit the necessary information and click **Save** to save the changes.

Adding/Editing/Deleting a Travel Document

1. Repeat step 1 of Editing Visitor record and navigate to the **Document** tab.
2. Click **Add New** to start the Document Add/Edit form. Manually enter the necessary information or scan the passport using a passport reader.
3. Click **Upload File** to upload the document image.
4. Click **OK** to save the information.
5. Click **Edit** to edit the information or **Remove** to remove the information entirely.

Adding Future Visits

Future visits can be added to visitors who visit the ship regularly.

1. At the Visitor Setup window, search the visitor record using the filters or enter the last name in the name search field.
2. Click **Edit** at the ribbon bar.
3. Navigate to the **Future Visits** tab and at the ribbon bar, click **Add Visit**.
4. Select the visit date from the calendar and click **OK** to add.
5. To edit, click the **Edit Visit** and select a new date.
6. To remove, select the visit date from the grid and then click **Remove Visit**.

Deleting Visitor Record

1. Repeat step 1 of Editing Visitor record and click **Delete**.
2. At the Delete Visitor dialog box, click **Yes** to delete.

Enable/Disable a Visitor Record

This function enables/disables a visitor from going onboard and sets the posting status to inactive when the record is disabled.

1. Repeat step 1 of Editing Visitor record and click **Disable** on the ribbon bar.
2. In the dialog box, select **Yes** to disable the record. The **Enable** button illuminates when the record is disabled and the status in the Inactive column of the search grid changes to Yes and vice versa.

Updating Visitor Onboard/Ashore Status

On most occasions, the onboard/ashore status of the visitors going onboard or leaving for shore are updated by swiping/scanning their board card. A manual intervention may be required on some instances, and is performed from the Visitor Setup window.

1. In the Visitor Setup window, search the visitor record using the filters or enter the last name in the name search field.

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2. Double-click the selected **account** and select **Yes** when prompted.
3. This updates the **Onboard status** column in the search grid to **Yes**.

Posting Status

A visitor can have an account assigned for posting consumption charges while onboard, and this requires linking a System Account to the profile.

The Allow Posting radio button is set to *Yes* by default when a System Account is assigned and when the visitor status changes to *Onboard*, as illustrated in table below.

Table 19-5 Posting Status Definition

Function	Allow Posting Enabled When
Activate 'Enable Visitor'	System Account is linked and visitor is onboard.
Linked to System Account	Visitor is onboard and status is active.
Change status to Onboard	System Account is linked and visitor is active.

Auto Update Pre-Register RFID Card on Online Door Lock System

This function is only applicable to ships running OHC VisiOnline in Online mode, which allows the registration of board cards at QCIShore DB using the web services RegisterRFIDBoardCard function.

This function pushes the pre-registered RFID ID to the VisiOnline System automatically, requesting access to the door lock, or a call for an update of the RFID ID of the lock.

The following scenarios explains the process during the registration of the card.

Guest A Card is registered and the `RES_QCI_RFID_ID` is updated with the RFID UID.

The record is updated to the Ship DB in `RES_QCI_RFID_ID` field and inserted into the RFID table with `RFID_ACTIVE = 1` and `RFID_AUTO_UPD = 1`, and then runs WPF Security in Ship DB.

Scenario 1

1. Scan the card registered card for Guest A using OMNIKey, refer to Cruise Compatibility Matrix at Oracle Help Center for compatible devices.

   A record is created and added to PVF and send to VisiOnline with `PVF_CMD=ResPostCheckIn`.
2. `CCE` command is send to Ving to check in the card.

Scenario 2

The `RES_QCI_RFID_ID` is updated, but the record is not created in the RFID table in Ship DB.

1. Scan the card to check in at Gangway.
2. The record is added to RFID and the `PVF` table

Scenario 3

The `RES_QCI_RFID_ID` is updated, but the record is not created in the RFID table in Ship DB, and the Guest status is Onboard.

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1. Scan the card at the Gangway and this guest is placed in shore side. The RFID record is inserted.
2. Scan the card again, and the guest shows as going onboard and checked in.
3. Once the record is checked in, the record is added to the PVF table, to be send to VisiOnline
4. The system inserts to `PVF` when the `RES_STATUS` changes from `RE` to `CC`.

Scenario 4

If the `RES_BOARDCC` for the guest does not match the registered card track 2 value,

1. Scan the card at the Gangway.
2. System shows the card as not recognized.

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Document Return

The Document Return module tracks the movement of passenger's passports while they are temporarily stored and ensures their return during disembarkation.

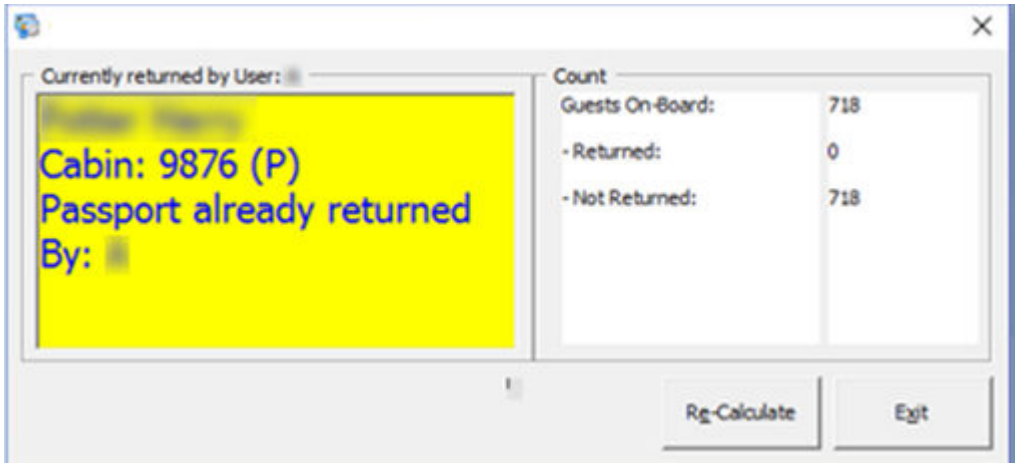
Document Return Function

This section describes the use of the Document Return module.

Using Document Return Function

To launch the Document Return module, double-click the shortcut on the **OHC Launch Panel**.

Figure 20-1 Document Return



At the Document Return screen, you can view a statistic count of the document returned or withheld. Clicking the **Re-Calculate** button refreshes the statistics.

Returning Passport Using Card Reader

At the end of the cruise, you must return all passenger passports during disembarkation.

To do so,

1. Obtain the passenger's cabin number and retrieve the passport from the passport repository.
2. Login to the **Document Return** module.
3. Swipe the guest board card through the card reader once to update the system that you have returned the Passport.
4. Swiping the passenger board card again sets the document status to **Passport already returned**.

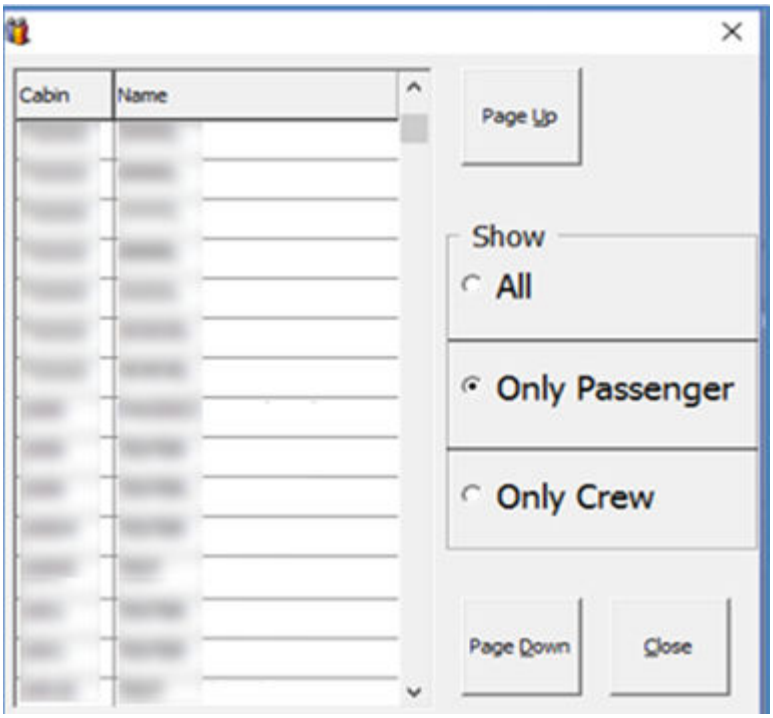
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Returning Passport Using Faulty Card Reader

If you return a passport by swiping an invalid board card or swiping it through a faulty card reader, you will receive a system prompt **Guest does not exist** in the Document Return screen. In such case, you can manually update the status using below steps.

1. Repeat steps 1 through 3 of Returning Passport Using Card Reader.
2. When the statement, **Guest does not exist** appears, double-click on any area within the yellow box to launch the passenger/crew list.
3. At the **Show Guest and Crew Document Not Returned** window, select **Only Passenger**.
4. Double-click the passenger name to set the status as **Passport returned**.

Figure 20-2 Document Return Passenger List



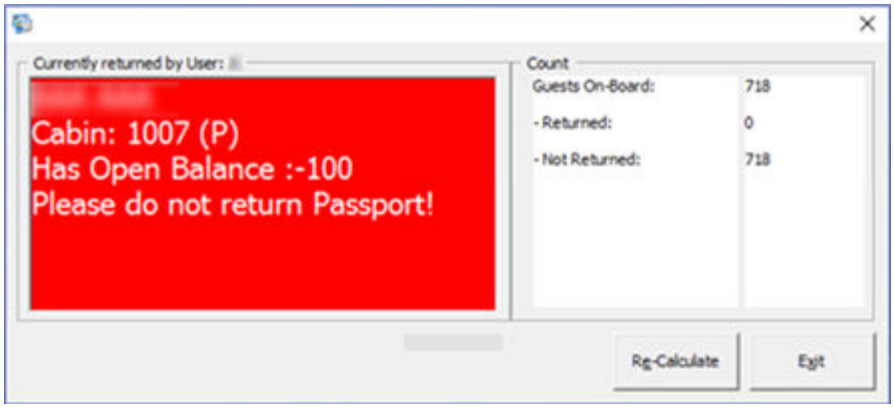
5. Click **Close** to return to the main screen. This deletes the selected passenger's name from the list.

Returning a Passport to an Unsettled Account

If you have the parameter to check the guest's open balances before returning the passport, the system displayes a warning and prohibits you from returning the passport. The guest must settle their account before you can proceed. See Appendix for parameter name and value.

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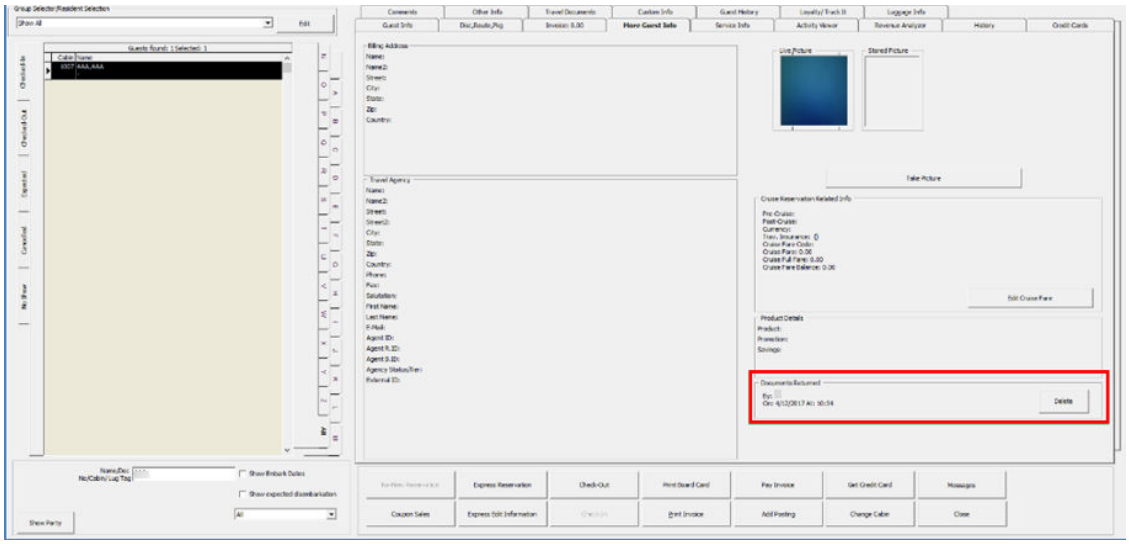
Figure 20-3 Open Balance Warning



Viewing Passenger Document Status

You can also view and reset the document return status from the guest account in the Management Module.

Figure 20-4 Document Status In Management Module



1. In the **Management** Module, navigate to **Cashier, Guest** function.
2. Swipe the passenger board card or look up the guest account by name/cabin number.
3. Select the account from the guest list and navigate to **More Guest Info** tab.
4. The document status is shown in the Document Return section.
5. To reset the status to **not returned**, click **Delete**.

User Security Group

User security access for the Document Return function in the Management module is listed below. The security privileges are assigned in the **User Security** module

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Table 20-1 Document Return User Access Rights

Security Reference No	Description
3281	Return Document
3282	Delete Document Returned Info

Appendix

This section lists the parameters available to the Document Return Module. You can access them from the **Administration** Module, *System Setup, Parameter*.

Table 20-2 PAR Group General

PAR Name	PAR Value	Description
Doc Return Display Open Balance	0, 1	Displays the Open Balance in Document Return 0 - No Balance Checking 1 - Balance Check
Doc Return Open Balance Check	0, 1	Check Open Balance in Document Return 0 - No Balance Check 1 - Balance Check

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21

Track It

The Track It program manages prohibited and restricted items such as camping gear, hazardous items, and alcohol from being taken on-board by crew, passengers, or visitors. The function includes, but is not limited to Quick Collect, Quick Check-Out and Quick Return. These functions are designed to handle the collection/return of restricted items, either by batch or individually.

System Configuration

This section describes the required configuration prior to using the Track It module.

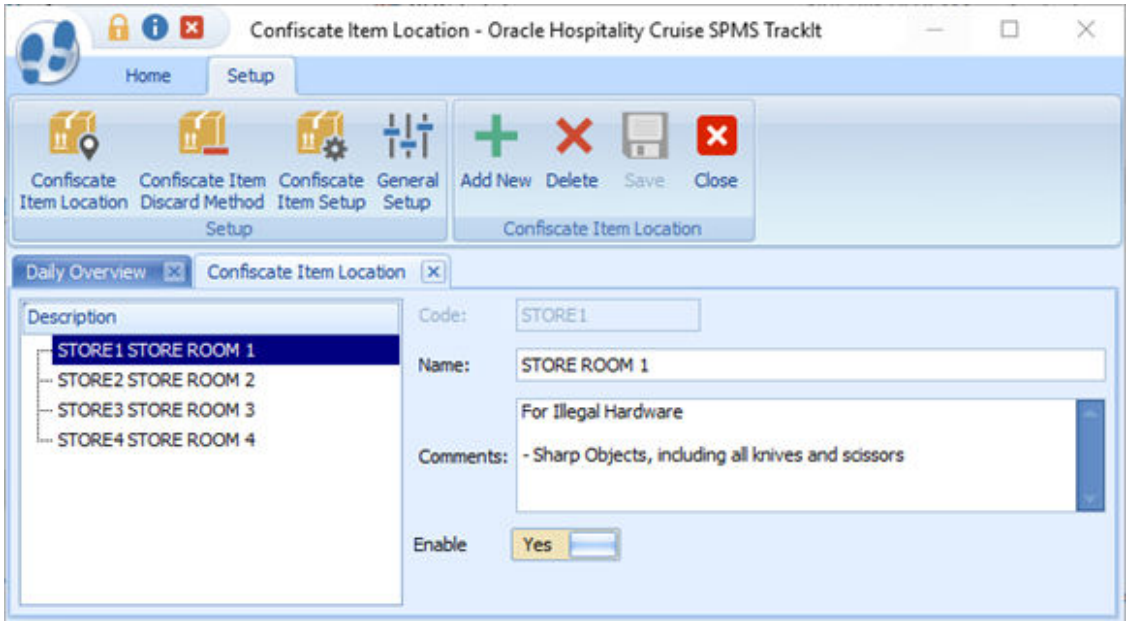
Accessing the Setup Window

To access the Setup window, start the Track It module, and select the **Setup** tab.

Confiscate Item Location and Item Discard Method

The Confiscate Item Location is used to identify where confiscated items are stored, and the Confiscate Item Discard Method records how the items were disposed. The configuration method is identical for both codes.

Figure 21-1 Confiscate Item Location



1. From the Setup tab, click **Confiscate Item Location** or **Confiscate Discard Method Item**.
2. To create a new record, click **Add New**.

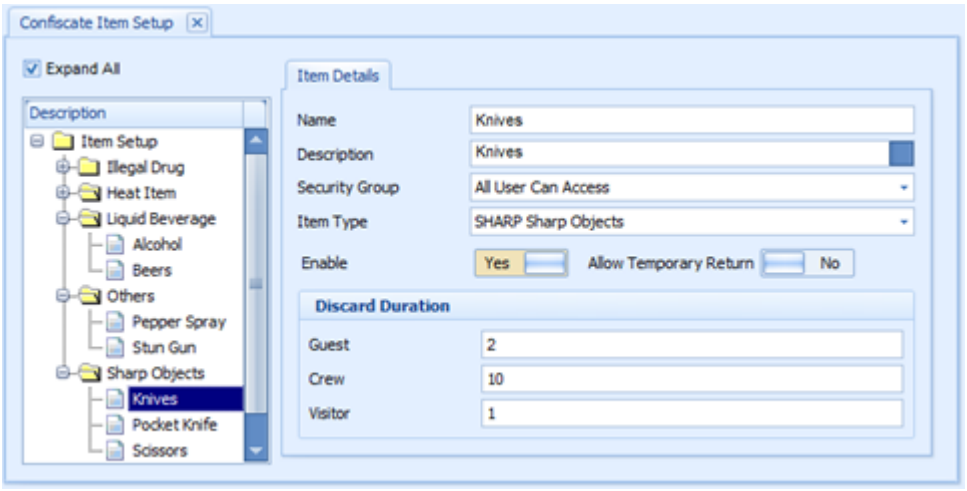
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3. Enter the short code, description and additional comments. For example, Stores Sharp Objects or Items Handed over to Customs.
4. The newly added code is enabled by default. To disable the record, slide the menu to the left to switch the display to **No**.
5. Click **Save**.
6. To enter an additional item, repeat from Step 1.

Setting Up the Confiscate Item

A Confiscate Item is a list of items prohibited or restricted on board the ship. These items are arranged in categories, depending on the nature of the items.

Figure 21-2 Confiscate Item Setup



Creating a Confiscate Item Category

An Item Category is required before you begin creating the Confiscate Items list.

1. From the Setup tab, click **Confiscate Item Setup**.
2. To create a new category, select **Item Setup** and click **Add New**.
3. Enter the **Item Code, Name,** and **Description**
4. To save the new category, click **Save**.

Creating a Confiscate Item for Each Category

1. Select an **Item Category** from the tree view and click **Add**.
2. Enter the **Item Name** and, **Description**.
3. Select the **Security Group** from the drop-down list. The Security Group is defaulted to “All User Can Access” and is set up for the User Security module. Refer to Appendix A. User Security Group for more information.
4. The **Item Type** is defaulted to the selection from the tree view and *enabled* by default.
5. By default, the **Allow Temporarily Return** is set to **No**. If the item allows for temporarily return, slide the button to the right to set it to **Yes**.

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6. In the Discard Duration section, define the **maximum** number of days to keep the item in the store. The default value is: 0 = never discard.
7. To save the record, click **Save**.
8. To enter an additional **Confiscate Item**, repeat steps 2 to 7.

Setting Up a Signature Capture Device

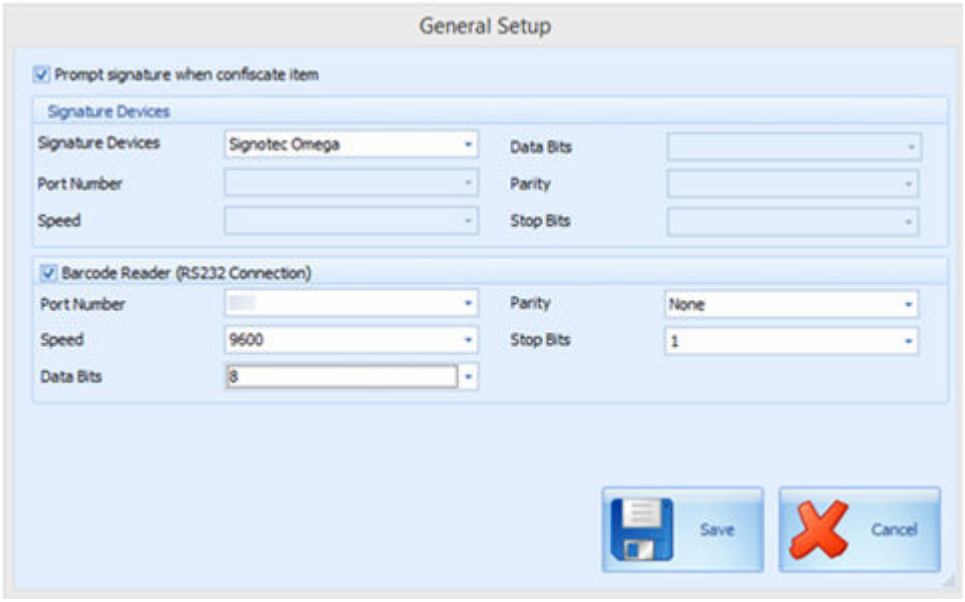
A Signature Capture device can be linked to enable signatures to be captured for items requiring acknowledgement.

1. From the Setup tab, click the **General Setup** button.
2. In the **General Setup** window, select **Prompt signature when confiscate item** and click the **Setup** tab.
3. Select **Signature Device** from the drop-down list.
4. Click **Save**.

Setting Up a Barcode Scanning Device

You can use a Barcode scanning device to scan the barcode on the tagged items.

Figure 21-3 Track It General Setup



1. From the Setup tab, click the **General Setup** button.
2. In the General Setup window, select the **Barcode Reader (RS-232 connection)** checkbox.
3. Select the device **Port Number, Speed, Data Bits, Parity,** and **Stop Bits**.
4. Click **Save**.

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Setting Up the Report Printer

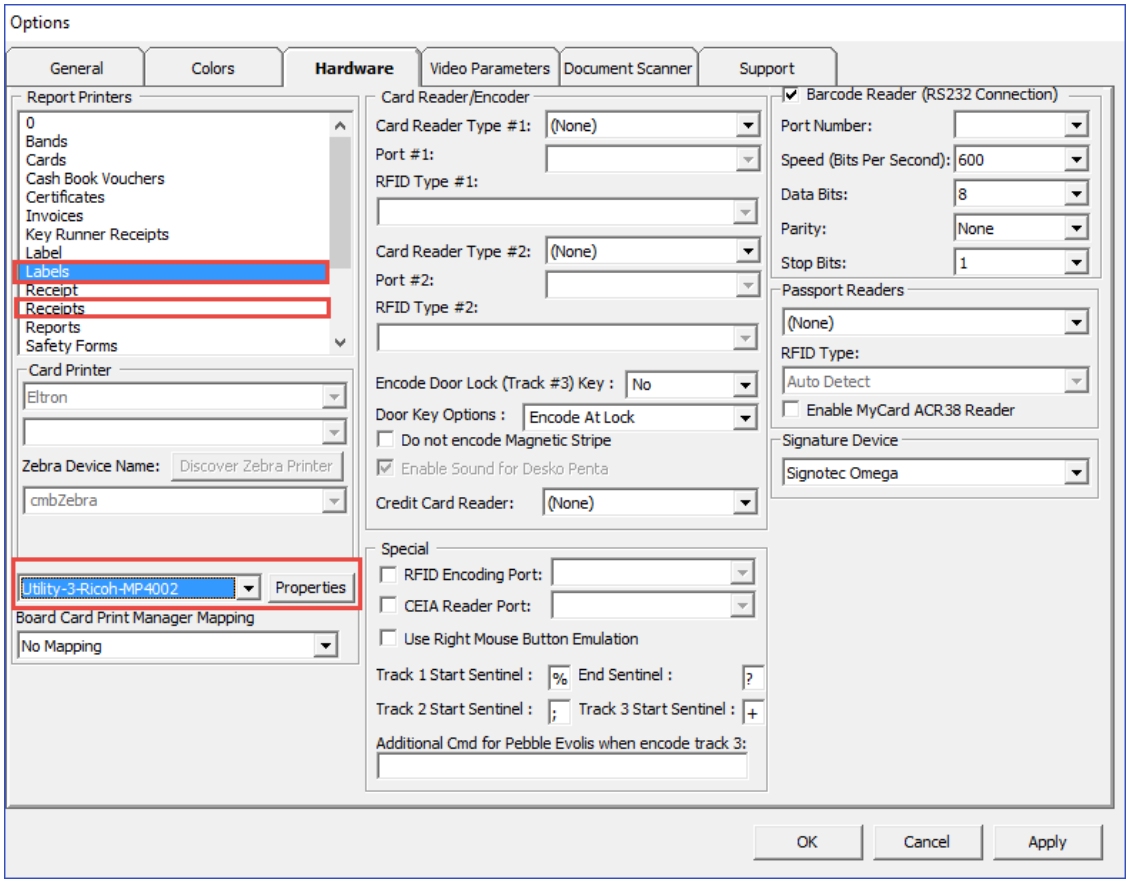
The following standard set of Track It reports are inserted into the SPMS Database during installation:

- Track It Return Receipt
- Track It Label
- Track It Receipt

In additional to the code and signature device setup, a report printer is required for report printing. Use the Management module to set up the printer.

1. Log in to the Management module and select **Options** from the menu.
2. Navigate to the Hardware tab, **Report Printers** section.
3. Ensure Labels and Receipts type are assigned to a printer.

Figure 21-4 Management Module Printer Configuration



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Configuring the Database Sequence for Barcode Printing

For barcode label printing, the item ID must be a minimum of six digits. An adjustment to the start sequence from 100000 is imperative. Running the following script recreates the Confiscated Item sequence.

```
DROP SEQUENCE [dbschema].CNT_CIL;

CREATE SEQUENCE [dbschema].CNT_CIL
 START WITH 100000
 MAXVALUE 10000000000000000000000000000
 MINVALUE 1
 NOCYCLE
 CACHE 20
 NOORDER;

 Commit;
```

Barcode Printing

For barcode printing, use the following prerequisites DLL's and fonts:

Copy the DLL and font files to folders `C:\Windows\system32` and `C:\Windows\SysWOW64.`

DLLs:

- Barcode.dll
- u2lbcode.dll

Fonts:

- Interleaved2of5.ttf
- Interleaved2of5Thin.ttf

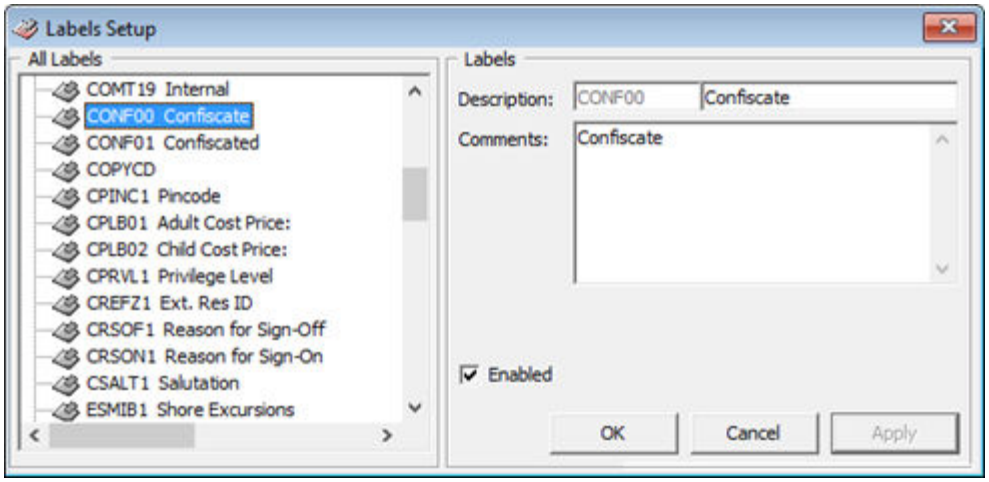
Setting up System Labels

Labels, such as Confiscate or Confiscated, are configurable according to user requirements and are set up in the Administration module.

1. Log in to the Administration module, select **Administration, System Setup**, and **Labels Setup**.
2. Locate the label codes **CONF00** and **CONF01**.

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Figure 21-5 Label Setup



3. Select the **code** and enter a new **label description**, and click **OK** to save. The label code **CONF00** refers to the word **Confiscate** and appears on the following windows:
   - Setup menu ribbon bar.
   - General Setup: “Prompt Signature Capture when...”
   - Confiscate Item Setup.
   - Confiscate Item Discard Method.
   - Confiscate Item Location.
   - Ability to show the “Confiscate Item” button in Confiscate Item menu.

The **CONF01** label code refers to the word **Confiscated** and appears on the following windows:

- Overview window: Total Item Confiscated Today.
- Overview window: Top 10 most confiscated item.
- Confiscate Item: Confiscated Item.
- Management module: Loyalty/Track It tab, Confiscated Item section.

The Track It program enables you to record confiscated items, their storage location, and when they are returned to the guest or crew.

Using the Track It program

Overview Window

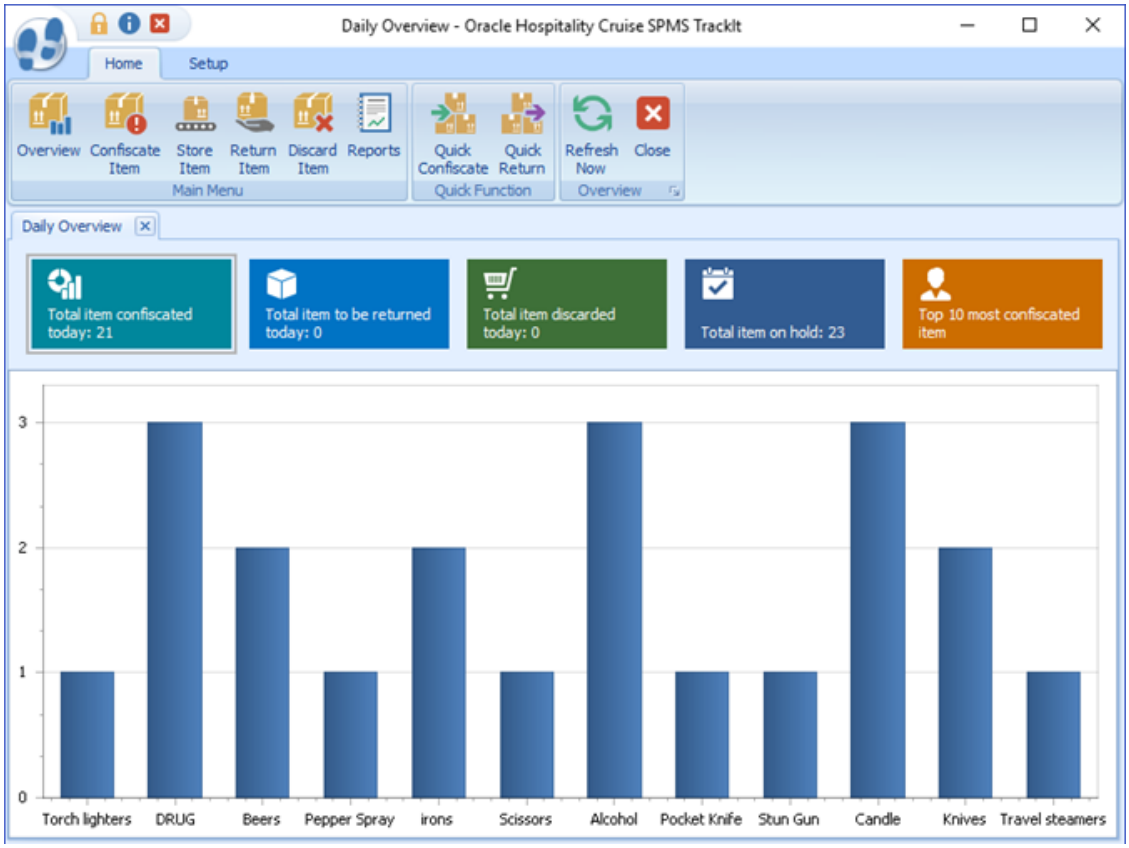
The Daily Overview window is the default window that appears when you log in, indicating the total number of items logged in a bar chart layout. The overview provides the following information:

- Item confiscated today
- Item to be returned today
- Item discarded today

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- Item on hold, yet to return to passenger
- Top 10 most confiscated item

Figure 21-6 Track It Overview Window



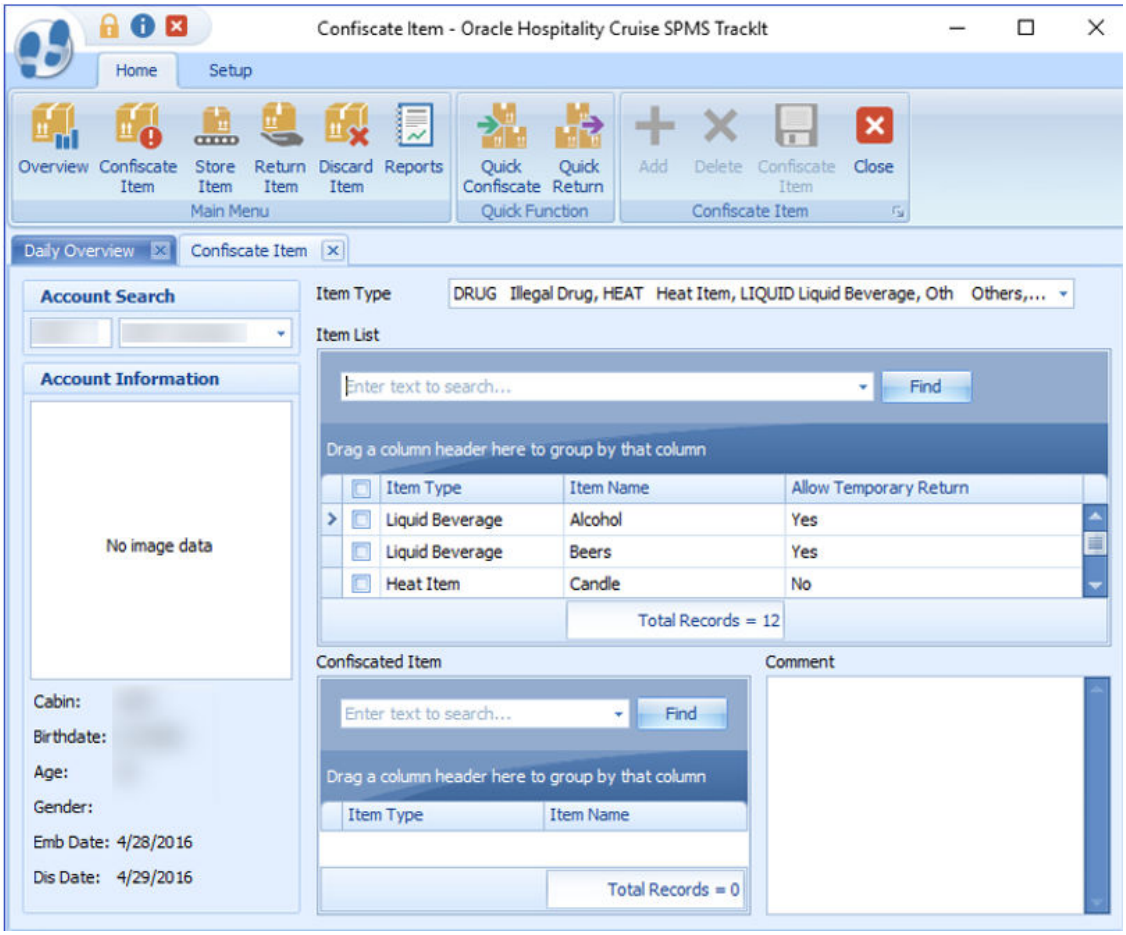
Recording Confiscated Item

The items confiscated from the crew, guests, or visitors are tagged and recorded before you store them in the designed storeroom.

1. Click the **Confiscate Item** button on the ribbon bar.
2. In the Account Search section, swipe the **board card** though the card reader to search for the account, or manually enter the cabin number/name in the Account Search field. Press **F2** to reset the search information.

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Figure 21-7 Confiscate Item Account Search



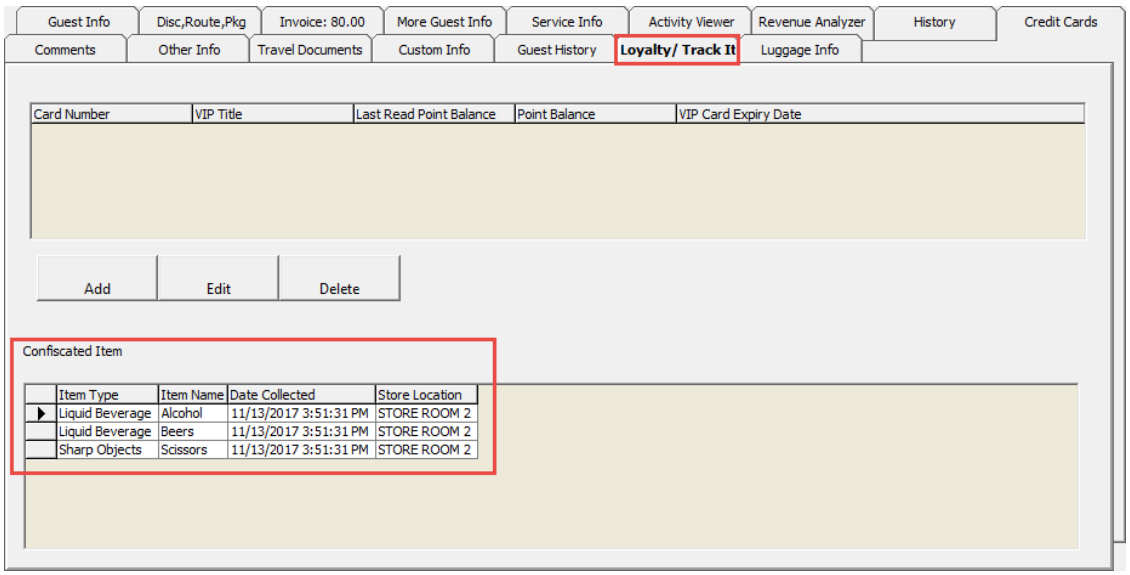
1. In the **Item Type** field, select the item category from the drop-down list, and click **OK**. Alternatively, you can search using the keyword search function by entering the **work** in the Item List text box and clicking **Find**.
2. Select the **Item checkboxes** and click **Add** to add the item to the **Confiscated Item** list.
3. If the same item is added to the list, the system prompts a warning message.
4. Click **Yes** to add the same item to the list or click **No** to cancel.
5. Insert a comment/description for the item, and click **Confiscate Item**.
6. If a signature device is connected, the system starts the **Signature Capture** dialog box.
7. Allow the passenger to sign on the signature pad, and press the **Green Check** icon on the signature pad.
8. If the signature device is not connected, a warning message will pop up, disallowing you to enter the item.
9. Once the item is added successfully, a bar code label item receipt printed.
10. To remove the item from the list, select the **item**, and click **Delete**.

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Managing Confiscated Items in Guest Handling Tab

When a passenger has a confiscated item, the Loyalty/Track It tab on Guest Handling display details of the items and storage location.

Figure 21-8 Confiscated Item in Guest handling



The confiscated items are recorded or removed from the **Loyalty/Track It** tab when:

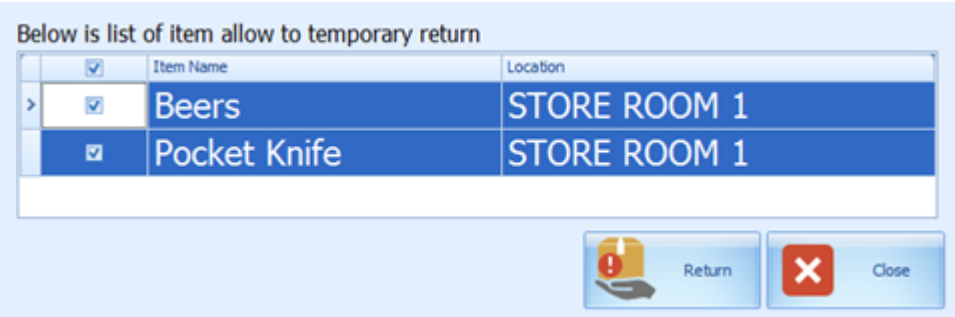
- Item is checked in at the security check point, and the system **inserts** a record in the Confiscated Item section.
- Item is returned or checked out temporarily to the guest/crew. The system removes the **record** from the Confiscated Item section.

Confiscated Items in Security Gangway

You can manage and track a confiscated item using the WPF Security module. Guest/Crew leaving the ship are prompted to collect their items when the board card is swiped or vice versa.

On the list of items to return page, select the **item** and click **Return**. Items will not be checked out if you click **Close**.

Figure 21-9 Check-out Handling at Security Gangway



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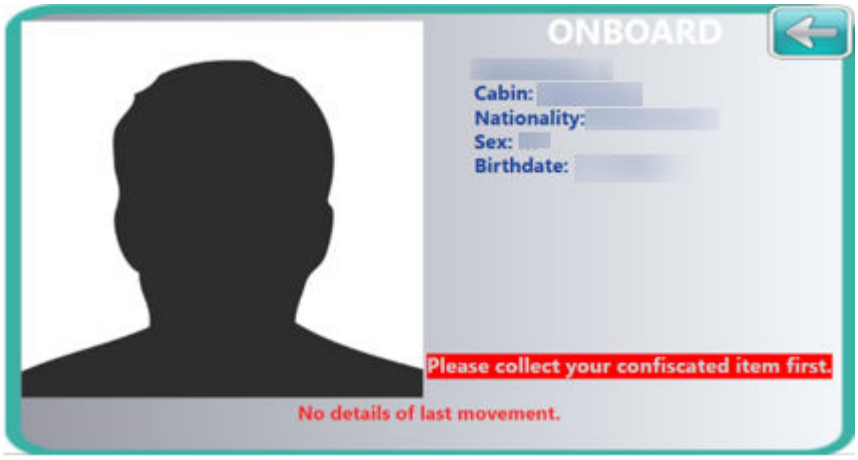
If there are items to be collected upon returning to the ship, the system prompts you to re-check in this item. Click **Collect** to check in the item.

Below is the movement activity that occurs at the Security Gangway:

- **For passengers going ashore:** The system changes the on-board status to shore-side without prompting the confiscated item list if a passenger checks out the item from the store location.
- **For passengers returning on-board:** The system changes the status from shore-side to on-board without prompting the confiscated item list when confiscated items are checked in upon returning from shore-side.
- **For expected check out passengers leaving for shore-side who did not collect their confiscated item:** The system prompts a reminder at the gangway for items to be collected before the status can be change.

The reminder prompt is configurable in Administration, Security Alert Setup.

Figure 21-10 Reminder for Collection of Confiscated Item for Departing Passenger

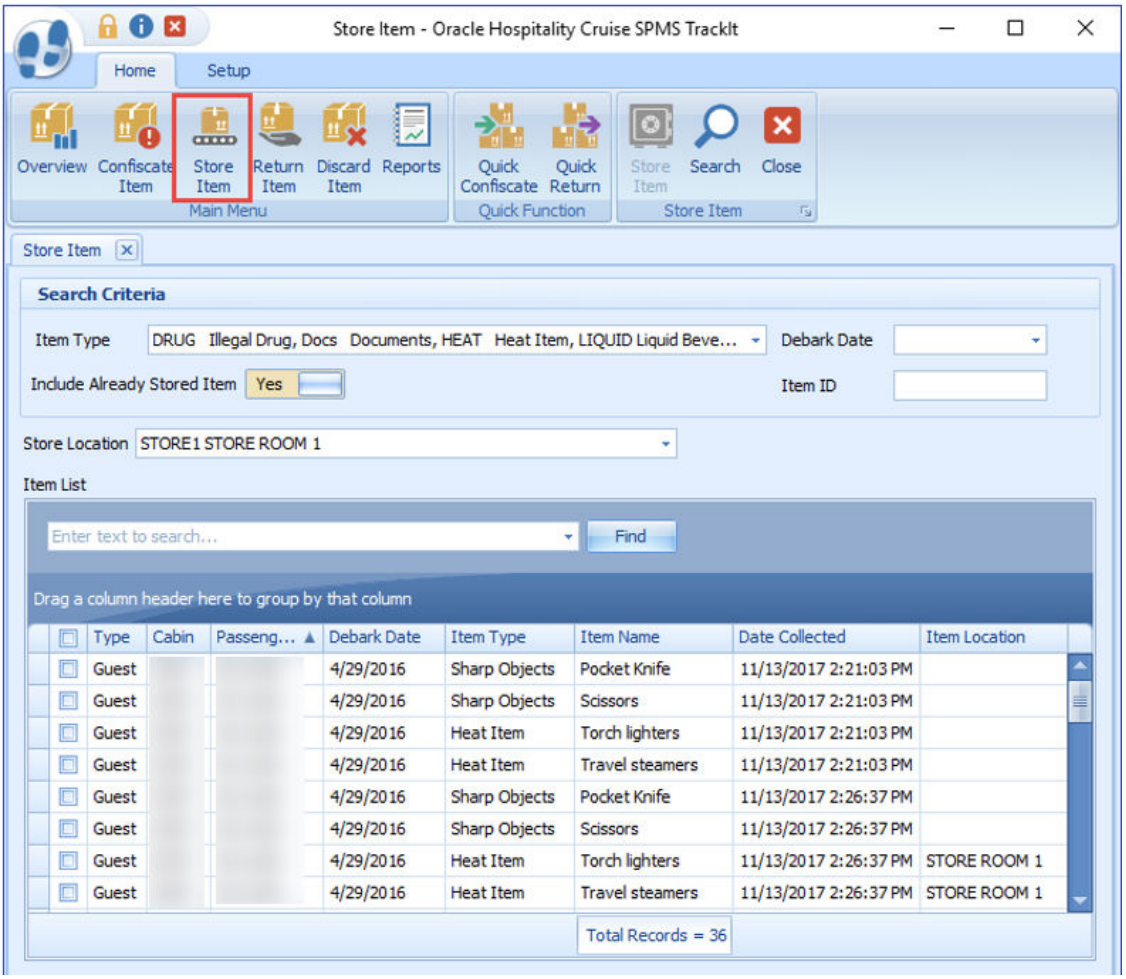


Storing Items in Designated Store

The **Stored Item** screen allows you to identify where to store items. Items that do not have a designated store assigned are listed in the **Item List** grid, which then enables you to assign a storage location.

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Figure 21-11 Store Item Window



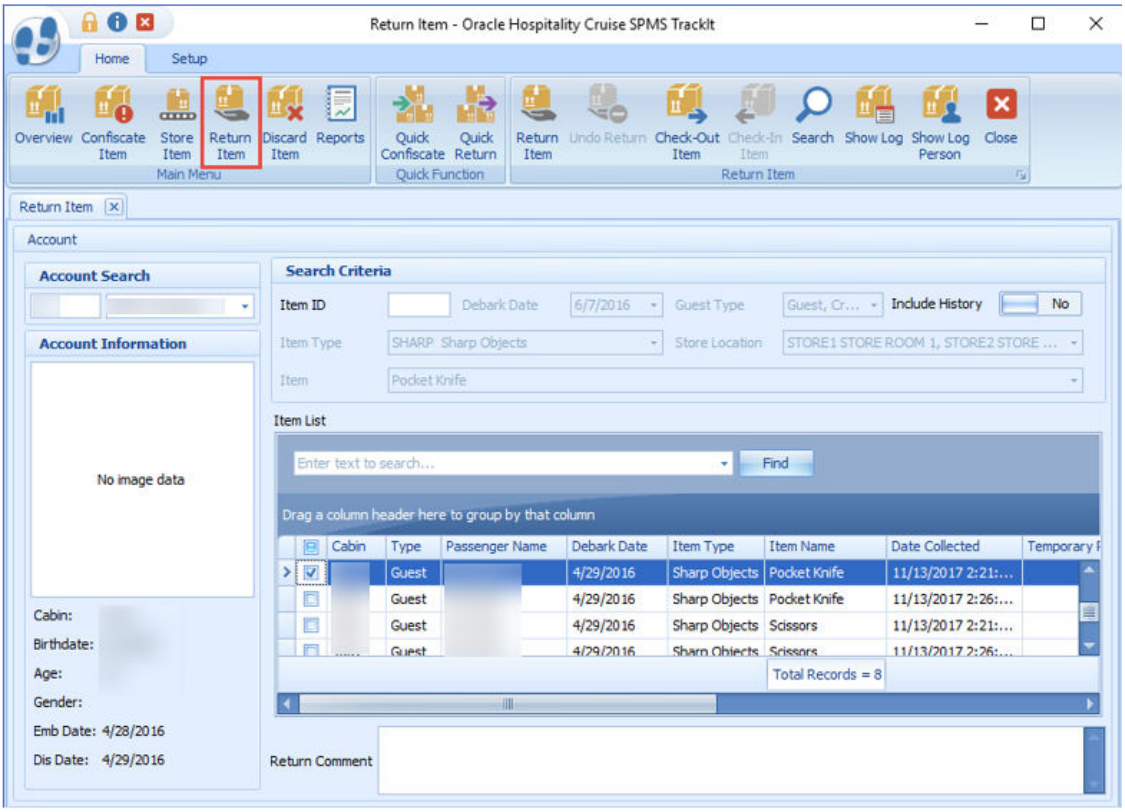
1. Click **Store Item** on the ribbon bar.
2. In the Search Criteria section, select the following filter option and click **Search**.
   - **Item Type:** Select the items to display from the drop-down list.
   - **Debark date:** Select an item stored date from the calendar editor.
   - **Item ID:** Use the barcode scanner or manually enter the Item ID in the text box. When entering a barcode manually, the Type and Debark Date options are disabled.
   - **Include Already Stored Item:** If the option is set to **Yes**, items stored will be listed in the grid including the store location.
3. Select the item(s) to store and select a store location from the drop-down list.
4. Click **Store Item**.
5. When the confirmation prompt appears, click **OK** to close. The Store location is added to the Item Location field.

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Returning Confiscated Items

You can temporarily return a confiscated item to the passenger before the passenger goes ashore. A good example of this would be camping equipment or supplies such as cooking utensils.

Figure 21-12 Return Item Main Window



1. Click **Return Item** on the ribbon bar.
2. In the Account Search section, search for the passenger account and select the item to return. Items that are allowed a temporary return are marked with **YES** in the Allow Temporary Return column.
3. Click **Check-Out** to check out the item. The system prompts a confirmation indicating the number of items being check-out.
4. Click **OK** to close the prompt. The date/time the item checked out is recorded in the Temporary Returned Date column.

Undoing Returned Items

An item returned accidentally to a guest can be undone by the Return Item function.

1. In the Return Item window, search for the **passenger account**.
2. Switch the Include History to **Yes** to display items returned to guests. The items appear in the Item List grid with the date and time shown in the Date Returned/Discard column.
3. Select the item and click the **Undo Return** button.

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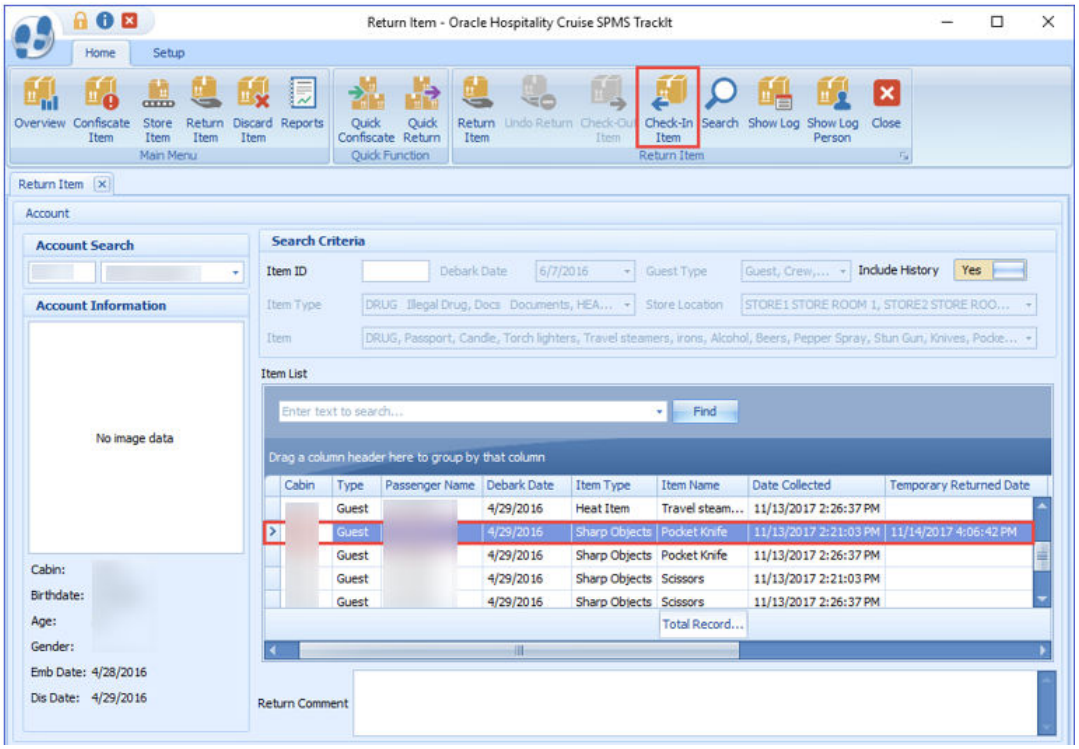
4. Click **OK** to confirm the number of returned items to undo reset the Date Returned/ Discarded column to null.

Checking in Confiscated Items

Items that were checked out temporarily must be checked back in when the passenger returns from shore-side.

1. From the Return Item window, search for the passenger's account.
2. Slide the Include History to **Yes** to display items previously checked out.

Figure 21-13 Checked In Item Window



3. Select the **item** and click **Check-In**.
4. The number of items checked in are shown in the confirmation prompt. Click **OK** to confirm, and this resets the **Temporary Returned Date** to null.

Viewing the Activity Log

This function displays a log of all activities for the selected item by the item, or the passenger, or the person who logged the item, depending on the type of log.

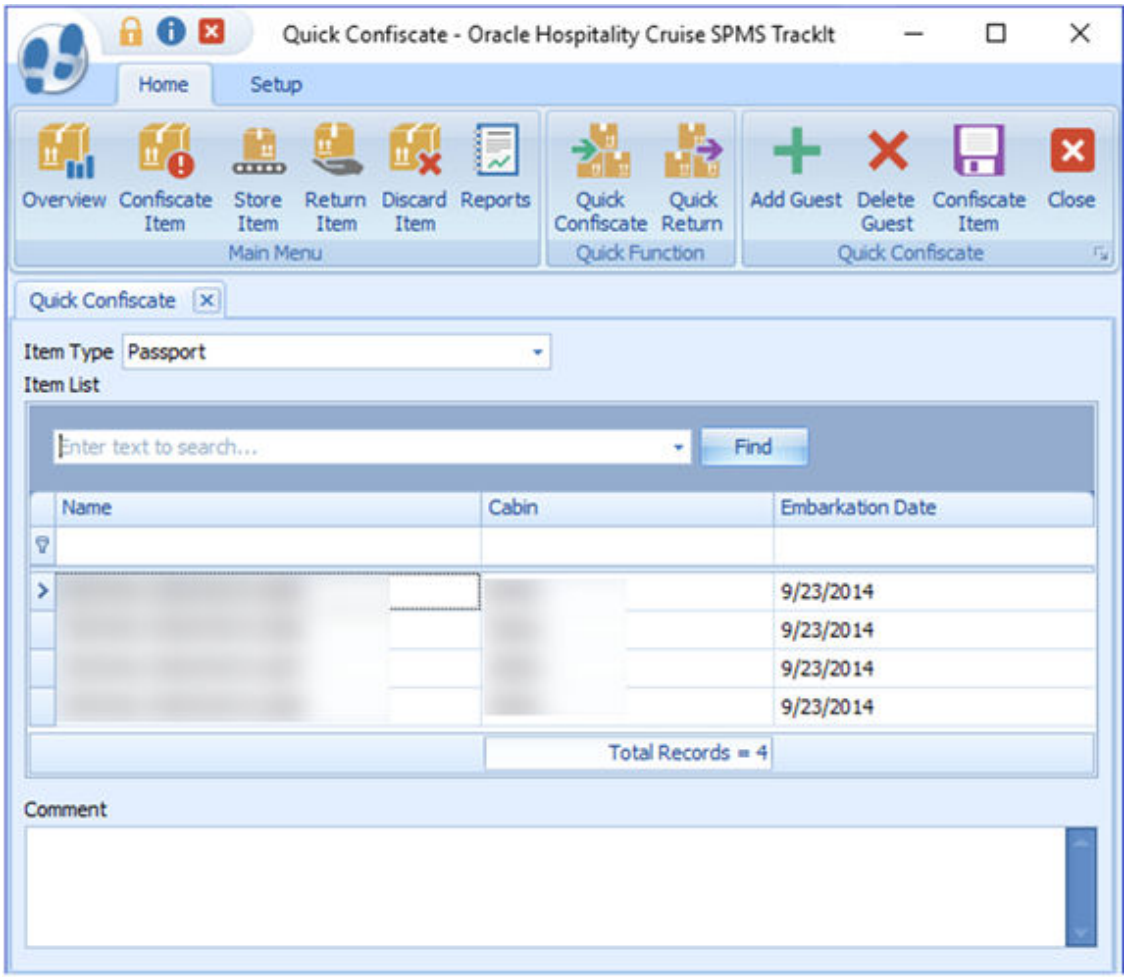
1. From the Return Item window, search for the **passenger account**.
2. Select the **item** from the Item List grid and click **Show Log** or **Show Log Person**.
3. A Track It Item Log window opens, displaying the logged activities of the selected item. Click **Close** to exit.

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Adding Confiscated Items by Batch

The **Quick Confiscate** functionality processes the confiscated items by batch instead of individually, and is mainly used when collecting the passenger passport upon check-in.

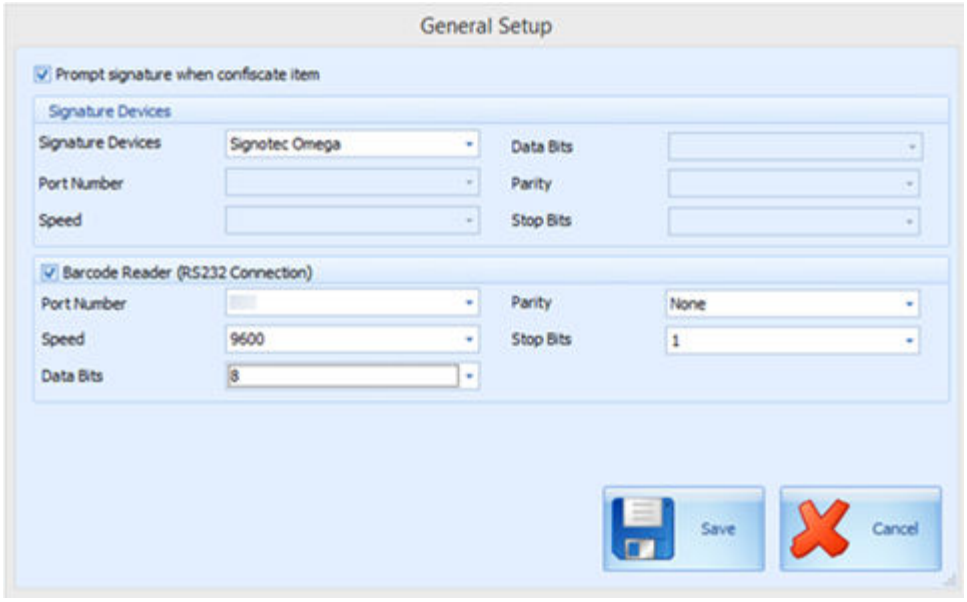
Figure 21-14 Quick Confiscate



1. Click the **Quick Confiscate** button on the ribbon bar.
2. Select the **Item Type** from the drop-down list.
3. Click the **Add Guest** button. This opens the Multiple Accounts Selection window.

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Figure 21-15 Quick Confiscate Multiple Account Selection Window



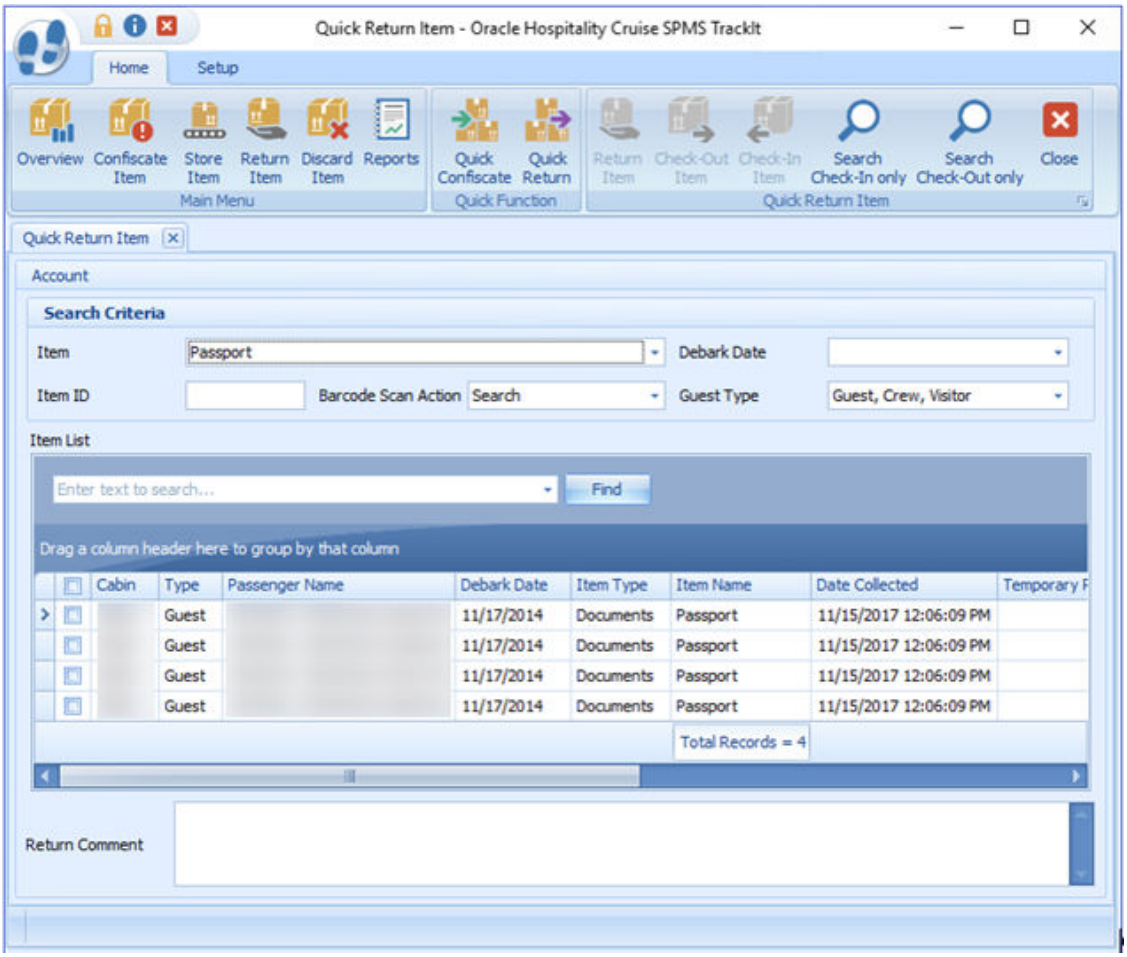
4. Use the available options to filter the list of passengers:
   - **Status:** Refers to the reservation status either Checked-In or Reservation.
   - **Account Type:** Refers to the type of accounts such as Guest, Crew, Group, or System Account.
   - **Pre-Selection:** Refers to the Quick Posting Templates setup in the Administration module. For Example: filter all passenger with nationality = US.
5. Account matching the selection is shown in the Non-Selected Accounts list. Click **Add All** or select the account from the grid, and click **Add** to transfer the accounts to the **Selected Accounts** window.
6. Click **OK** to confirm return to the Quick Confiscate window.
7. Click the **Confiscate Item** button.
8. At the confirmation prompt, click **Yes** to complete the process. The system does not print the item receipt for such instance.

Returning / Checking Out Items by Batch

Quick Return enables items to be returned by batches.

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Figure 21-16 Quick Return Item



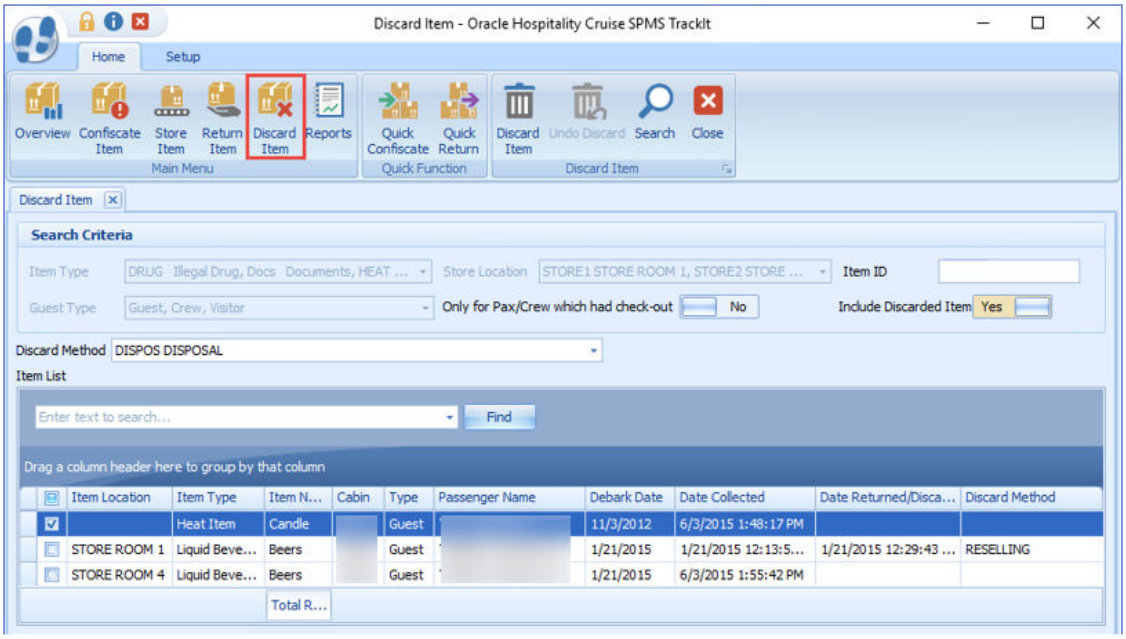
1. Click the **Quick Return** button on the ribbon bar.
2. Select an **item** from the item drop-down list.
3. Click the **Search Check-In Only** or **Search Check-Out Only** to display all of the confiscated items based on checked-in/out status and the selected item.
4. You can also narrow down your search using the **Debark Date** or **Guest Type**.
5. Select the **guest** by selecting the checkboxes besides the Cabin column and inserting a **comment** in the Return Comments text box.
6. Click the **Return Item** and click **OK** to confirm the total number of items returned. This updates the Date Returned/Discarded column with the actual process date/time.
7. To perform a mass check-out of the selected item, click the **Check-Out Item** button. This process updates the Temporary Returned Date column with the item check out date/time.
8. To return/check-out the item using a barcode scanner in the Quick Return function, select either the **Auto Check-in/Out** or **Auto Return** from the **Barcode Scan Action** menu, scan the barcode label, and click **OK** to confirm the date/time of the returned item.

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Discarding Confiscated Items

Discard Item disposes the confiscated items from the Ship's store when its storage period expires.

Figure 21-17 Discard Item



1. Click the **Discard Item** on the ribbon bar to list all confiscated items exceeding the maximum storage duration.
2. In the Search Criteria section, select one of the following options and click the **Search** button.
   - Select the type of information to display using the **Item Type, Store Location,** or **Guest Type**.
   - Slide the **Only for Pax/Crew which had check-out** to **Yes** to only show the passenger that has to check out.
   - To search the item with a barcode, enter the **barcode** in the Item ID field. To include items that were already discarded in the Item List, slide the **Include Discarded Item** to **Yes**.
3. Select the **Discard Method** from the drop-down list.
4. Select the item to discard, and click the **Discard Item** button.
5. At the confirmation prompt, click **Yes** to confirm.
6. Click **OK** to confirm the number of item(s) being discarded.
7. The Date Returned/Discarded and Discard Method columns are time stamped with the actual date/time when the system discards the items.

Undoing Discarded Items

1. To undo a discarded item, select a **discarded item** from the Item List.

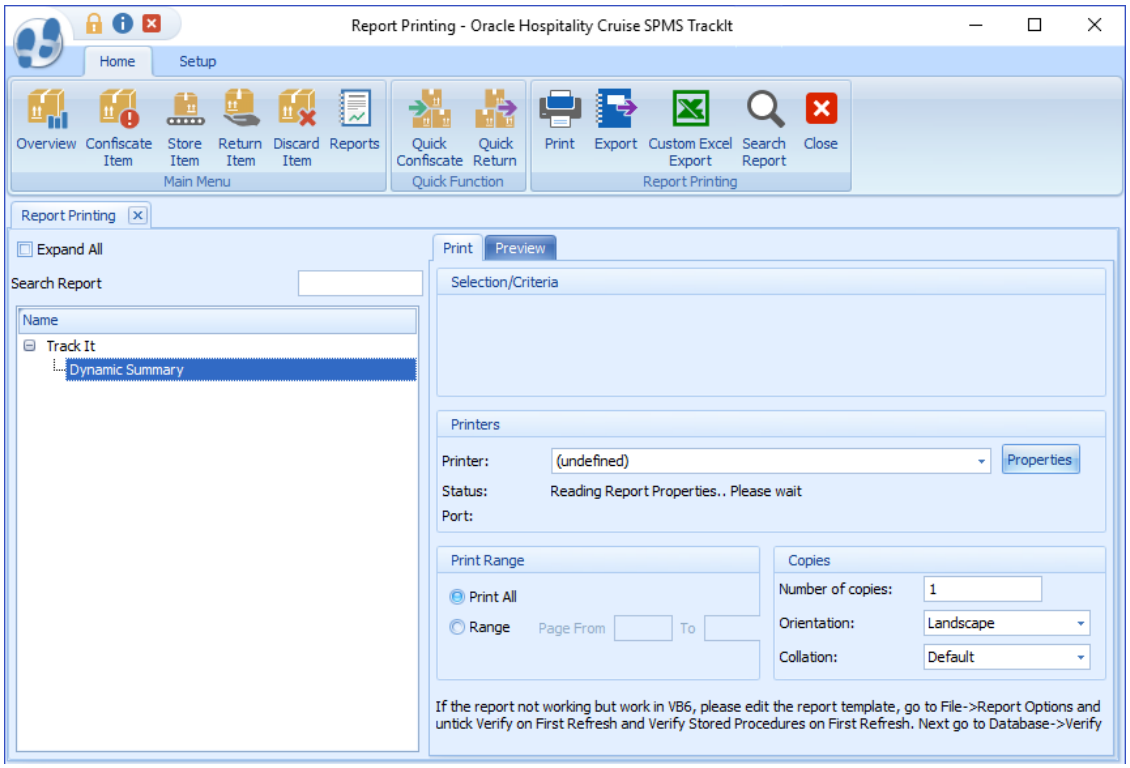
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2. Click the **Undo Discard** button.
3. Click **Yes** to confirm and click **OK** to confirm the total number of discarded items. This removes the timestamp in the Date Returned/Discarded and Discard Method columns from the selected item.

Viewing, Printing, and Exporting Reports

Reports are added in the Administration module under the **Track IT** report group and they are printable from the Track It module.

Figure 21-18 Report Dialog Window



- To view the available reports, click **Reports**.
- To print a report, select the **report**, and click **Print**.
- To view a report, select the **report**, and click the **Preview** tab.
- To export the report, select the **report**, and click **Export**.

Appendix

Appendix A. User Security Group

This section describes the user security access group for the confiscated items in Item Type, Item, and Item List in Confiscate Item, Store Item, Return Item, Discard Item, Quick Confiscate and Quick Return windows. These access groups coexist with Item configuration on the Setup tab. The security privilege is assigned in the User Security module.

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Figure 21-19 User Access Group Assignment

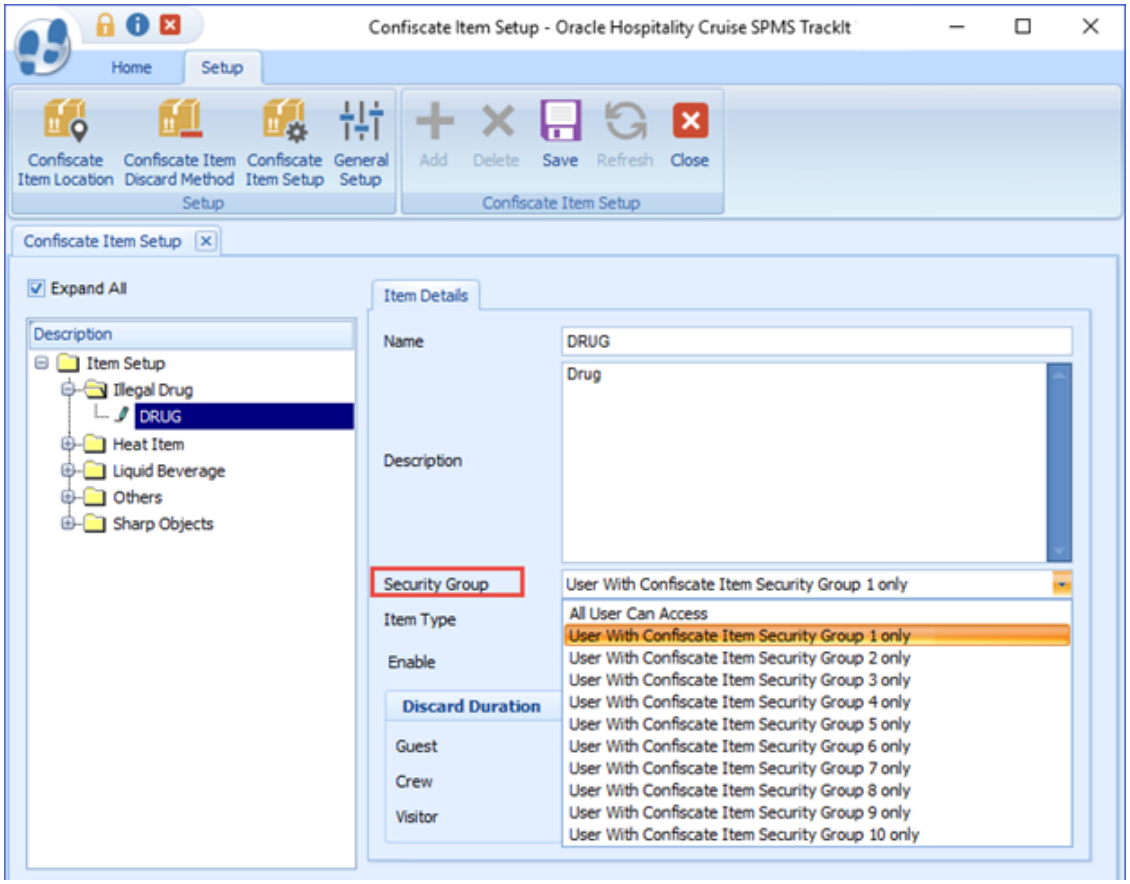
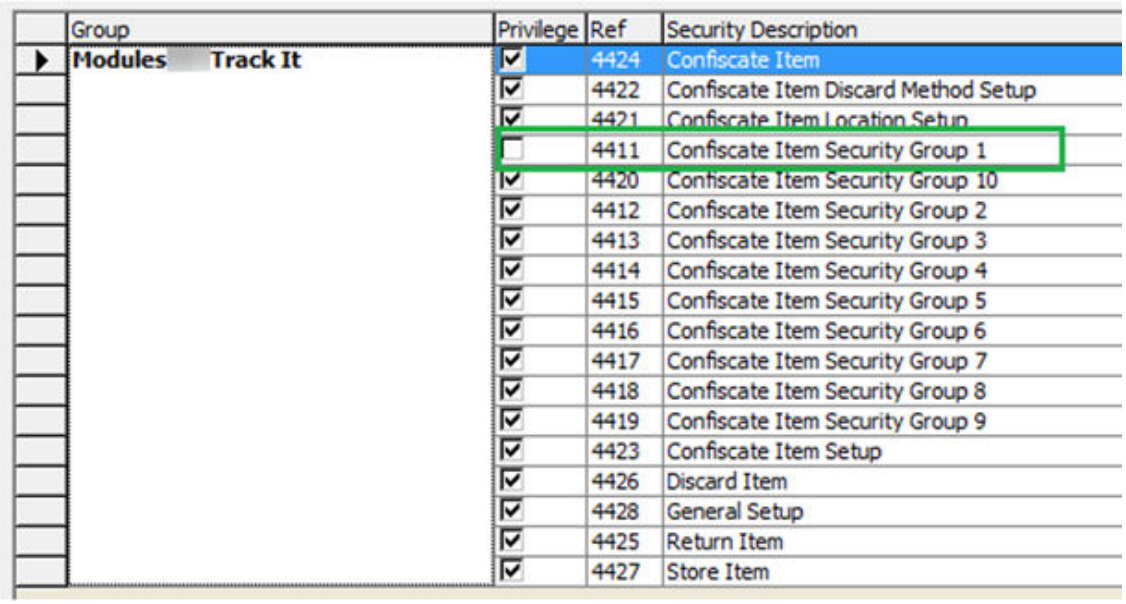


Figure 21-20 User Security Reference



Group	Privilege	Ref	Security Description
Modules Track It	☑	4424	Confiscate Item
	☑	4422	Confiscate Item Discard Method Setup
	☑	4421	Confiscate Item Location Setup
	☐	4411	Confiscate Item Security Group 1
	☑	4420	Confiscate Item Security Group 10
	☑	4412	Confiscate Item Security Group 2
	☑	4413	Confiscate Item Security Group 3
	☑	4414	Confiscate Item Security Group 4
	☑	4415	Confiscate Item Security Group 5
	☑	4416	Confiscate Item Security Group 6
	☑	4417	Confiscate Item Security Group 7
	☑	4418	Confiscate Item Security Group 8
	☑	4419	Confiscate Item Security Group 9
	☑	4423	Confiscate Item Setup
	☑	4426	Discard Item
	☑	4428	General Setup
	☑	4425	Return Item
	☑	4427	Store Item

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If you do not have the access rights assigned, the system prompts you with: *You have no access to view this item. Please consult your System Administrator for access* when searching or scanning for the confiscated item.

Table 21-1 Track It Item Security Access Group

Security Reference No.	Description
4411	Confiscate Item Security Group 1
4420	Confiscate Item Security Group 10
4412	Confiscate Item Security Group 2
4413	Confiscate Item Security Group 3
4414	Confiscate Item Security Group 4
4415	Confiscate Item Security Group 5
4416	Confiscate Item Security Group 6
4417	Confiscate Item Security Group 7
4418	Confiscate Item Security Group 8
4419	Confiscate Item Security Group 9

Table 21-2 Track It Functionality Access Rights

Security Reference No.	Description
4424	Confiscate Item
4422	Confiscate Item Discard Method Setup
4421	Confiscate Item Location Setup
4423	Confiscate Item Setup
4426	Discard Item
4428	General Setup
4425	Return Item
4427	Store Item

Appendix B. Parameters

This section describes the Parameters available to the Track It module. You can access Parameters from the Administration module under System Setup, Parameter.

Table 21-3 PAR Group Track It

PAR Name	PAR Value	Description
Prompt Signature during confiscate item	0, 1	0-No signature require, 1-Signature require

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22

Medical Module

The Medical module records medical services or medicines prescribed to the passenger/crew during the cruise.

System Configuration

In the Medical module, codes such as Sales Unit Type, Sales Transaction Type, Sales Categories/Items, and Allergies Type Setup are added to the Type of Medical Codes table for the onboard Medical Team to record the diagnosis and medicines dispensed to guest or crew. The steps to create the code is the same throughout the module, except for **Sales Items**, which has more details. The table below explains the type of codes to configure.

Table 22-1 Type of Medical Codes

Code	Description
Sales Unit Type	Defines the measurement unit used in sales items or transactions.
Sales Transaction Type	Defines the type of medical services offered to the passenger/crew onboard; for example, doctor or nurse consultation, medicines, treatment, and others.
Sales Categories/Items	Defines the group for a sale item; for example, medicines, treatment, laboratory test, and more. A category is required before an item can be created or added to a category.
Allergies Type Setup	Defines the type of allergies that the passenger/crew might have.
Pre-defined Diagnosis	Defines the common diagnostic offered to passenger/crew.
Pre-defined Treatment	Defines the treatment offered to the passenger/crew.
Pre-defined Comments	Defines the commonly use comments during treatment/consultation.

Accessing the Setup Page

To access the Setup page, launch the Medical module and navigate to the **Setup** tab on the main page.

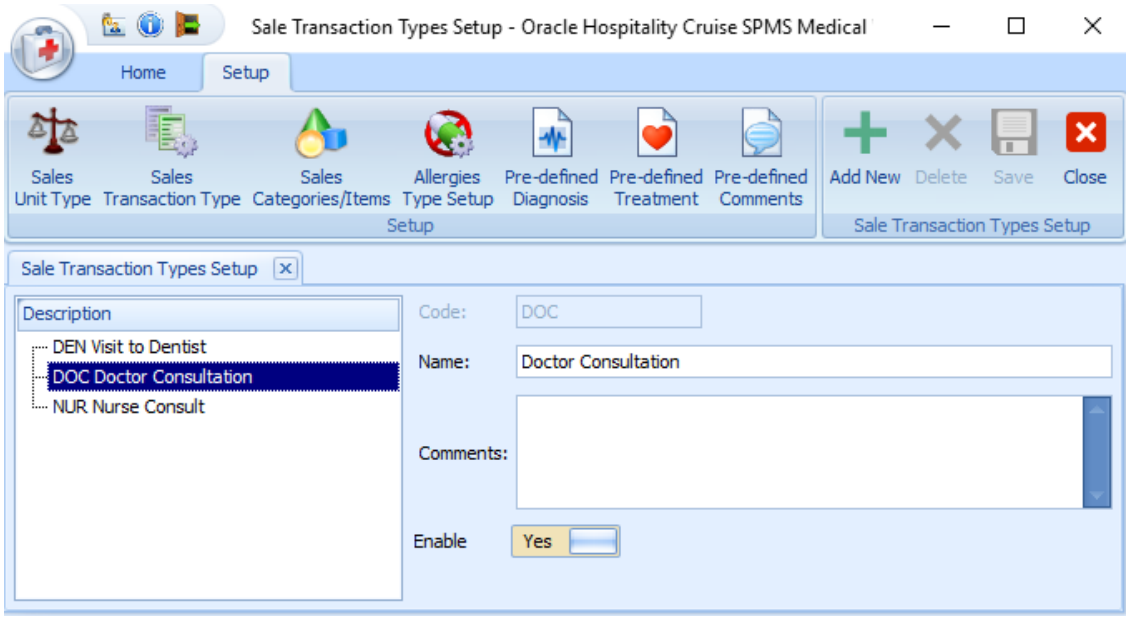
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Figure 22-1 Medical Setup Main Page



Adding New Codes

Figure 22-2 Setup Form and Icons



1. On the **Setup** tab ribbon bar, select the code type to configure.
2. Click **Add New** on the ribbon bar.
3. Enter the **Code, Name,** and **Comment** if any. The new code is enabled by default. Deselect or slide the **Enable** checkbox to **No** to disable the code.

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4. Click **Save** to save the record.
5. Repeat steps 2 – 4 to add more codes.

Deleting a Code

The Delete button is disabled when the code is assigned to a transaction. To delete, select a code and click **Delete** on the ribbon bar.

Setting Up Sales Categories/Items

The Sales Categories/Items is a category that groups the sale items according to the diagnostic, treatment or supplies, for example, medicines, treatment, and laboratory test. You must create a category before you can create an item or add the item into a category

Setting up Sales Items

Once the Sales Categories is available, you can create the sales items with pricing and the sale quantity for the respective category.

Figure 22-3 Sales Categories/Items Configuration Form

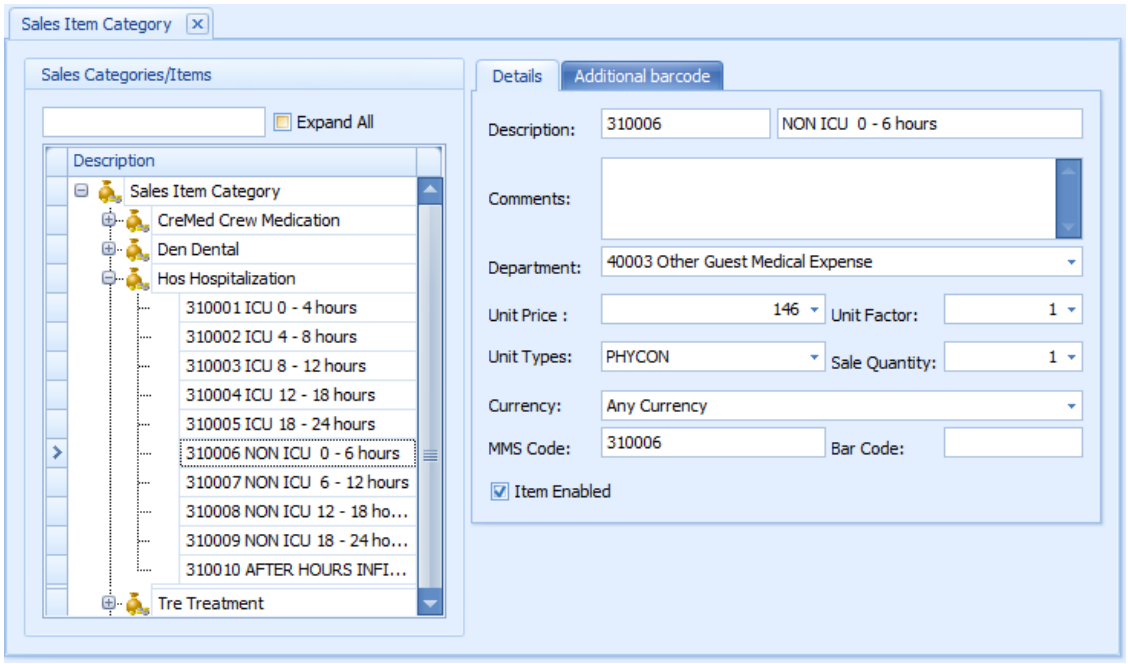


Table 22-2 Field Definition of Sales Items Window

Field Name	Description
Description	Item short code and name.
Comments	Item description
Department	Item Posting Department.
Unit Price	Price chargeable per unit.
Unit Factor	Quantity per box

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Table 22-2 (Cont.) Field Definition of Sales Items Window

Field Name	Description
Unit Type	Item unit measurement for example, bottle, ounce, milliliter, tablet, and others.
Sales Quantity	Item minimum quantity of the item.
Currency	Charge currency of the item.
MMS Code	Stock reference code in Material Management System (MMS).
Barcode	Item barcode.

1. On the **Sales Category** page, expand the tree view and select a **category**.
2. To create a new item, click **Add New** on the ribbon bar.
3. Enter the **Description Code and Name** in the description field.
4. Enter the item description in the comments field.
5. Select the **Posting Code** from the Department drop-down list.
6. Enter the **Unit Price, Unit Factor,** and the **Sale Quantity**.
7. Select the **Unit Types** from the drop-down list.
8. Select the **Currency** from the drop-down list. The system populates the item code and posts the value with current onboard currency during posting for an item that is tagged as **“Any Currency”**.

> **Note**
>
> If a currency is defined in the setup and the current onboard currency defers to, then the item code is not available for posting. For example, item currency is Euro and onboard currency is USD.

9. Enter the **MMS Code**, if any.
10. Enter the barcode in the Barcode field or scan the code using a barcode scanner. The scanned barcode of the item is shown in the **Additional barcode** tab.
11. Click **Save** to save the record.
12. Repeat the steps above to add more Sales Items.

Setting Up Minimum Pricing

You can set a minimum pricing for the items by enabling the **Medical, Minimum Pricing** parameter. This enables the system to post a minimum price when the item is below the defined value.

Setting Up a Report

A set of default reports such as Invoice or Medical Doctors Letter are available in the Medical Group in Report Setup. Contact Oracle Support if you wish to customize a report.

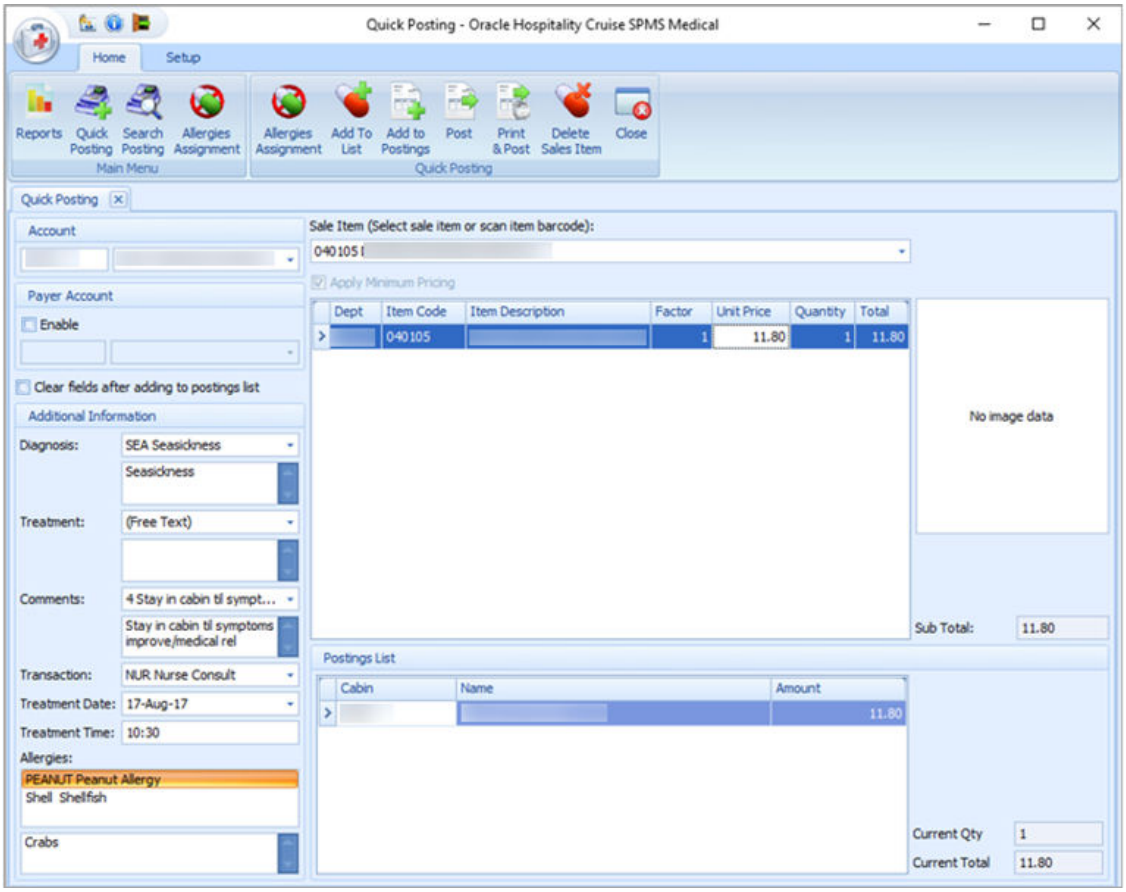
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Posting a Charge

Quick Posting

The Quick Posting function enables you to post a charge to an account. If a minimum pricing is set up, the “Apply Minimum Pricing” checkbox is selected by default. The system posts the minimum price when the value of the posting is *lower* than the amount defined. For example, if the minimum price defined is $1 and the item is priced at $0.50, the system will post $1.00.

Figure 22-4 Quick Posting



1. Click **Quick Posting** on the ribbon bar.
2. Select an account from the **Account** field.
3. In the **Additional Information** section, select from the drop-down list the predefined code/ comment or manually enter the information in each section by selecting the (Free Text) code, and enter the comments in the next section.
4. Click the **Allergies Assignment** to assign the allergies, if any. This opens the Allergies Assignment screen. Select the respective allergy code(s) or manually insert the description in the **Allergies Remarks** field, and click **Save**.
5. Select the **Sale Item** using the drop-down list or scan the item using a barcode scanner.

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6. In the item list, edit the **Factor, Unit Price,** and **Quantity** if needed, and click **Add to List** at the ribbon bar.
7. Repeat step five to add **Sale Item**.
8. Click the **Add to Postings** on the ribbon bar to transfer the charge to Postings List.
9. To remove a Sale Item before posting, select the item in the Posting List grid and click **Delete Posting**.
10. To confirm the posting, click the **Post** or **Print & Post** on the ribbon bar.
11. Click **Close** to exit the Quick Posting function.

Posting without Minimum Pricing

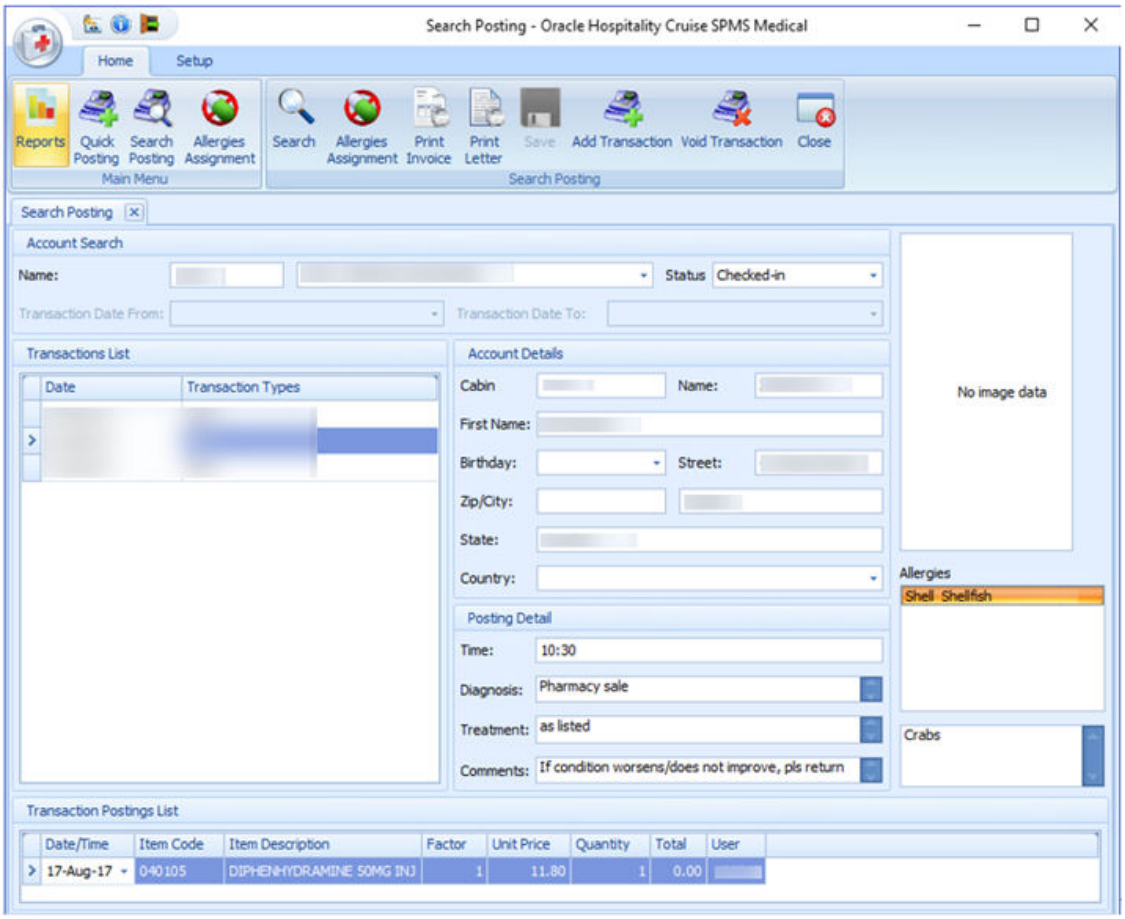
1. Repeat steps 1 – 4 from the above.
2. Under the **Sale Item** section, deselect the check mark for **Apply Minimum Pricing".**
3. Select the **Sale Item** using the drop-down list or scan the item using a barcode scanner.
4. In the item list, edit the **Factor, Unit Price,** and **Quantity** if needed, and click **Add to List** at the ribbon bar.
5. Repeat step three to add more to **Sale Item**.
6. Click the **Add to Postings** at the ribbon bar to post the charge.
7. Click **Post** or **Print & Post** on the ribbon bar to confirm posting.

Search Posting

The previous posted transactions are searchable using the Search Posting function. Besides searching for past transactions, you can add or void a transaction, print an invoice/letter or search for allergies assigned to passengers/crew.

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Figure 22-5 Search Posting



Searching for a Transaction

1. Click the **Search Posting** button on the ribbon bar.
2. Enter a cabin number or an account name in the **Name** field. The default status to display is **Checked-In**. Changing the status to **Checked-out** enables you to search for transactions of past bookings.
3. Click the **Search** button on the ribbon bar. A list of transactions appears on screen.
4. Select a transaction from the list to display the details of the posting.

Adding a Transaction

Click **Add Transaction** on the ribbon bar to open the **Quick Posting** screen. To add a posting, see Quick Posting

Voiding a Transaction

1. Select a **transaction** from the Transaction list.
2. Click the **Void Transaction** button on the ribbon bar.
3. At the Void Posting Reason prompt, enter the **Void reason**.
4. Click **OK** to complete the void.
5. Click **Close** to exit the search function.

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Printing an Invoice

1. Repeat steps 1 – 3 on Searching for a Transaction.
2. Select an item to print from the Transaction List section. You can print multiple records on an invoice using **CTRL+** to select the items.
3. Click the **Print Invoice** button on the ribbon bar.

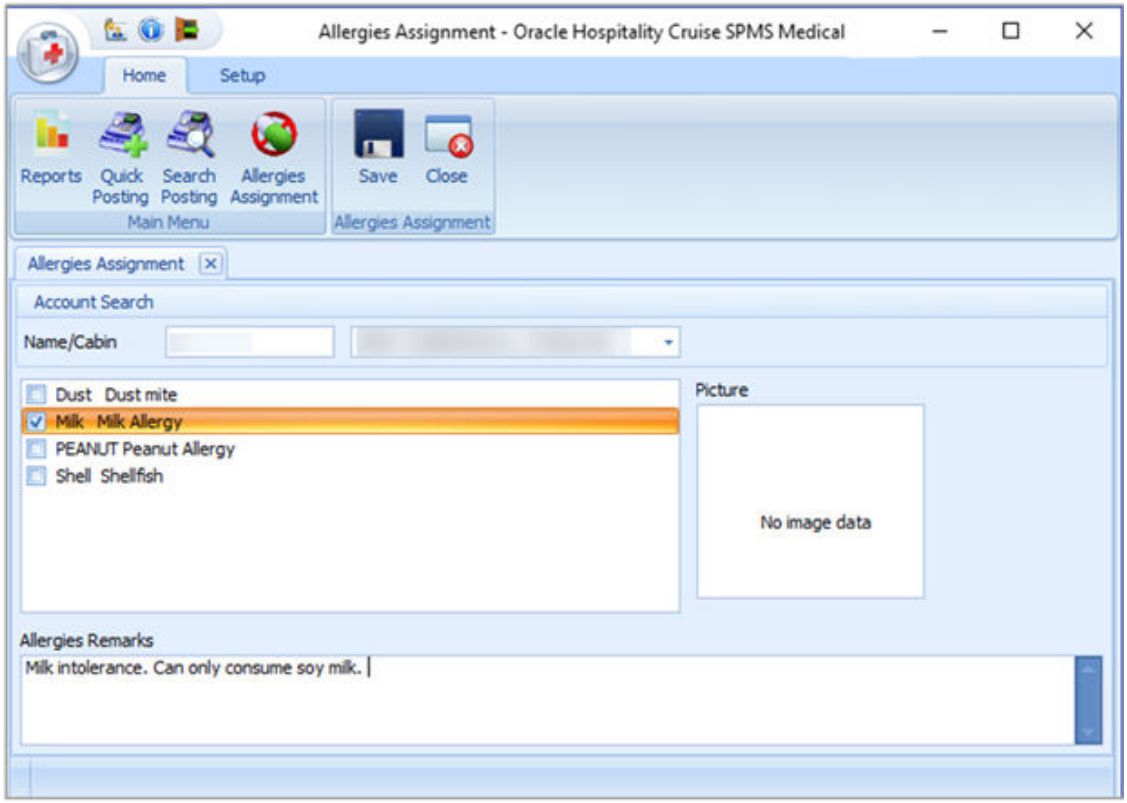
Printing a Medical Letter

1. Repeat steps 1 – 3 of Searching for a Transaction.
2. Select an item to print from the Transaction List section.
3. Click the **Print Letter** button on the ribbon bar.

Allergies Assignment

A person might be allergic to a certain food, medicine or product, and it is important to add such information to the guest/passenger record.

Figure 22-6 Allergies Assignment



1. Click the **Allergies Assignment** at the ribbon bar.
2. Select an **account** from the name/cabin field.
3. Check the predefined allergies type or manually enter the allergies in the **Allergies Remarks** field.

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4. Click **Save** to save the record.
5. Click **Close** to exit the screen.
6. Repeat from step 1 to edit the record.

Appendix

Appendix A — User Security Group

This section describes the user security access group for the Medical module, and these security privileges are assigned in the **User Security** module.

Table 22-3 Medical Module Functionality Access Rights

Security Reference No	Description
418	Edit Account Information
213	Postings
4453	PrePaid/Routed Bookings
212	Setup

Appendix B — Parameter

This section describes the parameters for the Medical module, and they are accessible from the Administration module under System Setup, Parameter. Setting these parameters alters the program behavior. If you are unsure, consult Oracle Customer Support for further clarification.

Table 22-4 Parameter Group — Medical

PAR Name	PAR Value	Description
Minimum Pricing	0, 1	Minimum price for minimum pricing policy
Minimum Pricing Department		The Financial Posting Department for minimum pricing
Medical Item Code		Sales item code for minimum price item
Prepaid/Routed Bookings	0,1	Applicable to Medical Module

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Part VII
Finance

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23
POS Discount Handling

This topic detailed the usage, application and handling of preset loyalty discounts applicable at the Point-of-Sale (POS) using the Oracle Simphony. When a discount is applied, both the discount and net payable amount are shown on their check at the revenue centre.

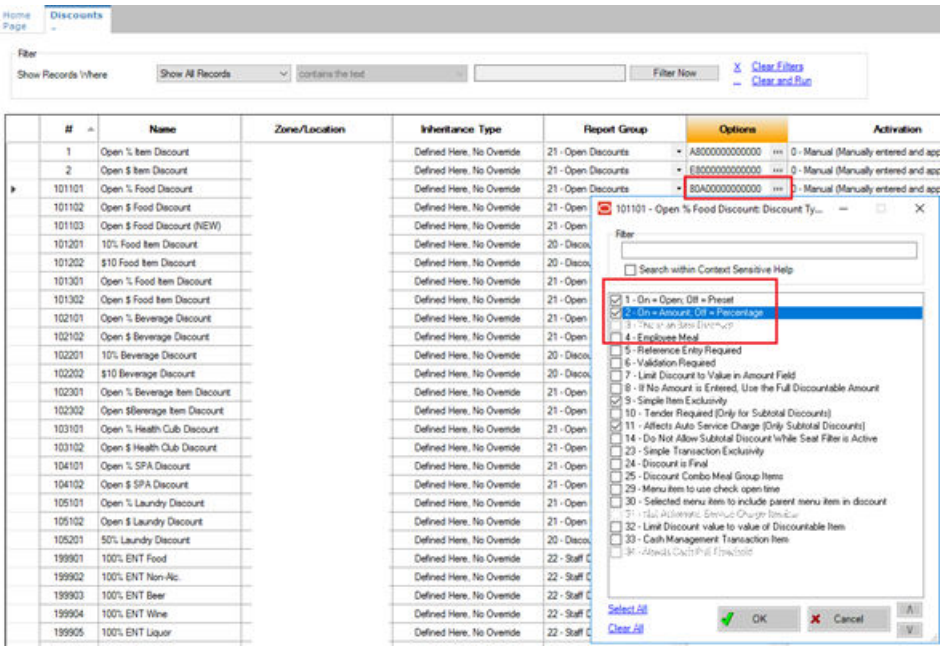
Simphony POS Discount Setup

The Hospitality Cruise Shipboard Property Management System (SPMS) uses Oracle Simphony to set up, manage, and apply a wide range of discounts to clients, crew, and others at the Point-of-Sale.

For the discount to work, an additional setting at the Oracle Simphony Enterprise Management Console (EMC) is required. The following sections describe the requirement for each of the modules. Use the following steps for Discount Record Setup:

1. Log in to the **Simphony EMC** module and go to the **Configuration** menu.
2. Select **Discounts** under **Sales** sub-menu.
3. Select a discount record that you want a POS discount to apply automatically on a guest check.
4. Under the **Option** column, click the **ellipsis** (...) button to open the **Discount Type Definition** window.
5. Select each checkbox as needed.

Figure 23-1 Simphony EMC Discount Record Setup



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- 1 – ON = Open OFF (Selected)
- 2 – ON = Amount OFF (Selected)
- 3 – This is an Item Discount (Deselect)

6. Click **OK** to save.
7. Launch the **Administration** module.
8. Go to the Administration, POS Discount, POS Discount Rate (Advance) setup window.
9. Expand the **Discount Rate**, select a **revenue center** and a **MICROS Discount Record (Only Open Amount Subtotal Discount)** from the drop-down list to link a discount record.
10. Click **Apply** to save.

Setting Up POS Discount Key

To view the discount level entitlement and to automatically apply the discount on the guest check, a new payment key is needed at the POS workstation. This is configured in Simphony Extensibility function. See *Oracle Hospitality Cruise Shipboard Property Management System – Simphony POS Setup Guide.pdf*, on *OHCSPMSPOSInterface Functions* section for available functions.
For other setting, see *Simphony POS User Guide*

POS Discount Setup

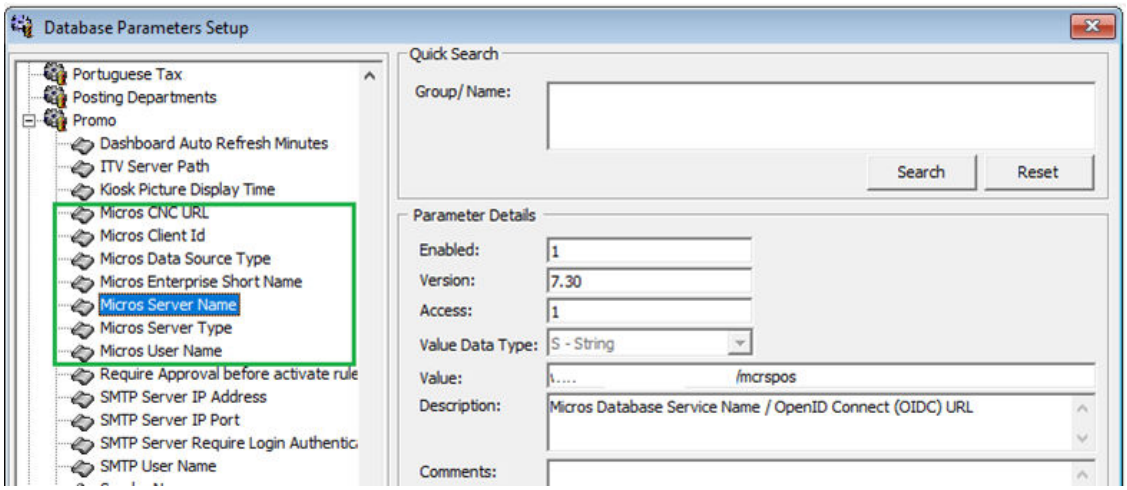
The below are the two methods are available for setting up the POS discount:

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

You can set up one or both methods to support for different types of discounts. To configure the discounts, go to the **Administration module, POS Discount**.

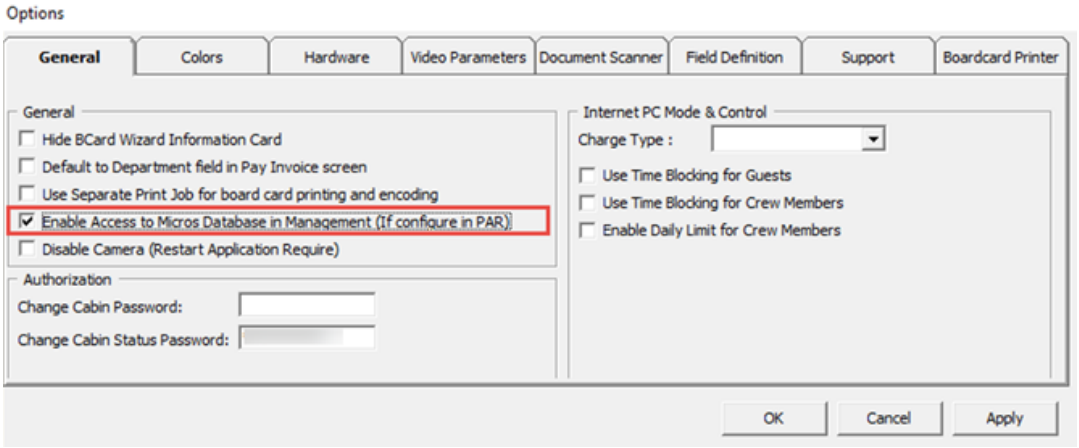
Setting Up Simphony Server Connection

You must have an active connection to the Simphony Server before you can retrieve any of the data. The Simphony Database id (SID) needs to be listed in the **tnsname.ora** before adding the connection to SPMS Database Parameter.



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1. Log in to the **Administration module, System Setup, Database Parameters Setup**.
2. In the Database Parameters Setup window, expand the **Promo** group.
3. Enter these values in their respective parameter field:
   - **Micros CNC URL:**URL of Simphony CNCAPI on cloud or premises
   - **Micros Client Id:** CNCAPI Account's property, for retrieval of authorized cookies, code and token
   - **Micros Data Source Type:** 0 – Direct access Micros DB, 1-Simphony Cloud CNCAPI
   - **Micros Enterprise Short Name:** Enterprise Short Name value in Simphony Cloud Welcome email
   - **Micros Server Name:** Micros Database Service Name or OpenID Connect (OIDC) URL
   - **Micros Server Type:** Set to '0' for Oracle Server, 1-Microssoft SQL Server
   - **Micros User Name:** Micros User Name or OIDC User Name
4. An error message, "*MICROS Server is offline, MICROS setup will be disabled*" appears when the parameter entered is incorrect.
5. Log in to the **Management** module and select the **Options, General** tab.
6. Select **Enable Access to Micros Database in Management**.
7. Click **Apply** to save.

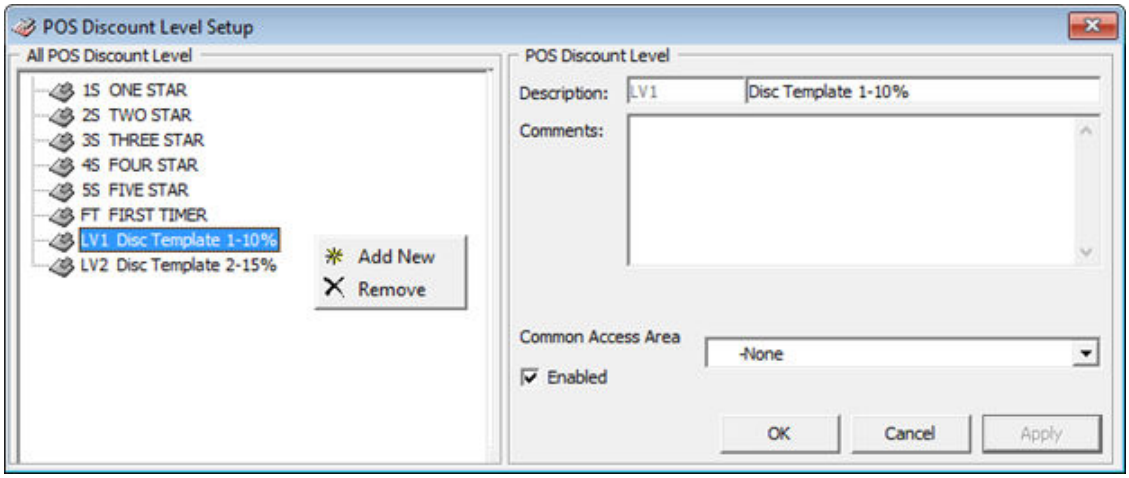


POS Discount Level Setup

The POS Discount Level Setup is the first set of configurations for the POS Discount, defining the discount group to be used in POS Discount Rate Setup.

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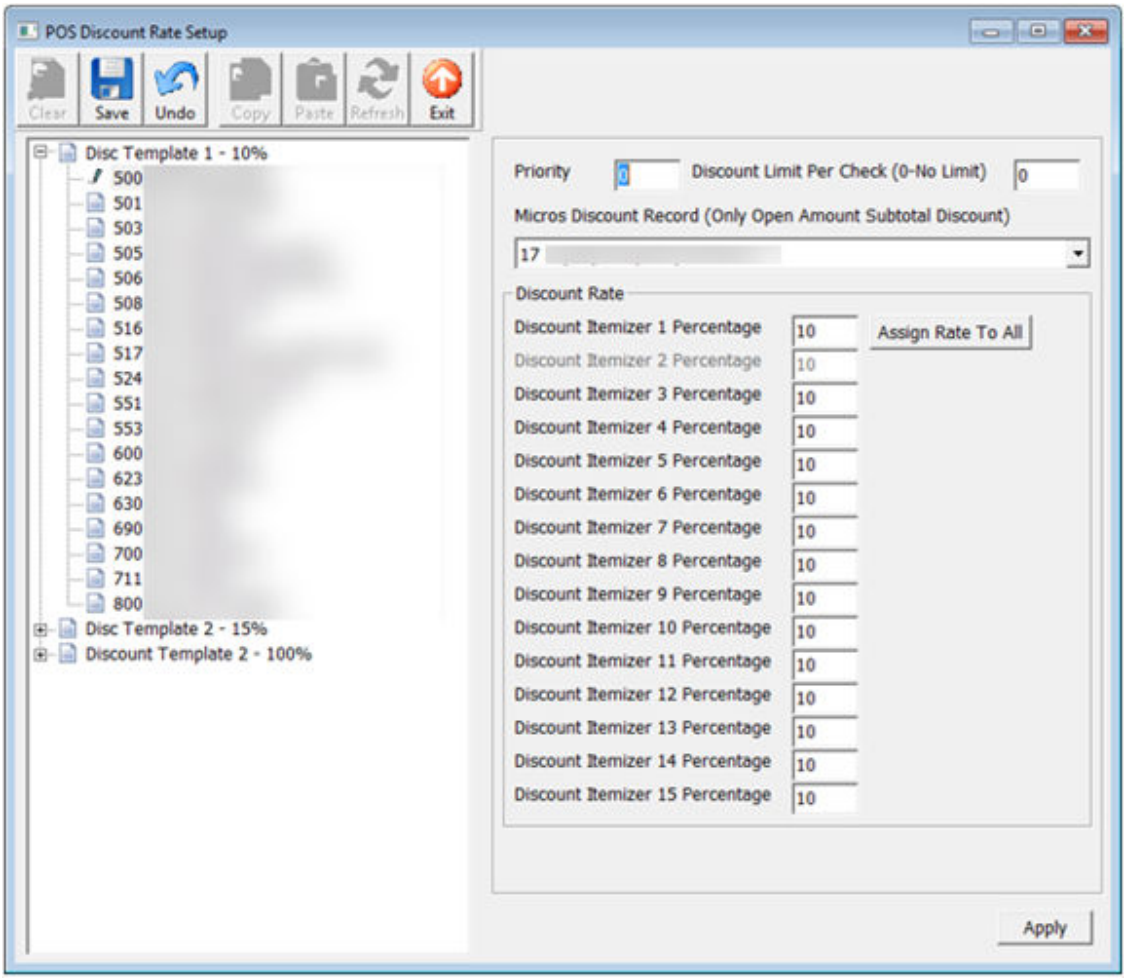
Figure 23-2 POS Discount Level Setup



1. From the **Administration, POS Discount** menu, select **POS Discount Level Setup**.
2. Right-click and select **Add New** in the POS Discount Level Setup window.
3. Enter a **code**, a **description**, and any **comments** in the Description and Comments fields.
4. Click **Apply** to save and **OK** to exit.
5. Repeat the steps above to enter more discounts.

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POS Discount Rate Setup



1. From the **Administration, POS Discount** menu, select **POS Discount Rate**.
2. In the POS Discount Rate Setup window, expand the tree view of the discount level to display the Revenue Center.
3. Select **Revenue Center** of the discount level.
4. Assign the discount priority number in the **Priority** field for each of the outlets. The lower priority number would have a higher chance for the discount to be applied to the guest with the same cabin and booking number. For more information, see Discount Level Assignment.
5. Enter the total discount limit per sales check in the **Discount Limit Per Check (0-No Limit)** field. For more information, see Discount Limit Per Check.
6. In the MICROS Discount Record (Only Open Amount Subtotal Discount) drop-down list, select the **POS discount record** discount key. See Setting Up POS Discount Key
7. In the **Discount itemizer 1 Percentage**, enter the discount rate.
8. To apply the same discount rate to the rest of the discount itemizers, click **Assign Rate To All**.

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9. Click **Apply** to save.

Discount Level Assignment

In the following table, there are two POS Discount levels set up with a different priority number and discounts at each outlet. This will apply to the guest when:

- Guest X and Guest Y are staying in the same cabin and both have the same booking number.
- Guest X assigned to Four-Star POS Discount level and Guest Y assigned to Five-Star POS Discount level.

Table 23-1 POS Discount Level Assignment

POS Discount Level	Revenue Center (Outlet)	Priority Number	Discount (%) for all itemizers
Four-Star	A	1	40
	B	2	30
	C	0	20
Five-Star	A	0	50
	B	2	40
	C	1	30

The Discount Level applied are:

1. Guest X spends in outlet A and is entitled to a Five-Star discount rate of 50 percent (The Five-Star level has a lower priority number in outlet A).
2. Guest X spends at outlet B and is entitled to a Four-Star discount rate of 30 percent (both Four-Star and Five-Star levels have the same priority number for outlet B).
3. Guest X spends in outlet C and is entitled to a Four-star discount rate of 20 percent (Four-Star level has the lowest priority number for outlet C).
4. Guest Y spends at outlet A and can be entitled to a Five-Star discount rate of 50 percent
5. Guest Y spends at outlet B and can be entitled to a Five-Star discount rate of 40 percent (both Four-Star and Five-Star levels have the same priority number for outlet B).
6. Guest Y spends in outlet C and can be entitled to a Four-star discount rate of 20 percent (Four-Star level has the lowest priority number for outlet C).

Discount Limit per Check

The default value is set to zero (0 = no limit) per check. If you set a value per check at 50, the maximum discount is limited to $50 per check. When the total discount value for a check exceeds the predefined limit, the full value applies.

For example, One-Star POS Discount Level has a discount rate of 10 percent and a discount limit up to $100 per Guest check. A check posting at an outlet has a total of $1200, the Guest is only entitled to a maximum of a $100 POS Discount instead of $120.

POS Discount Eligibility Group Setup

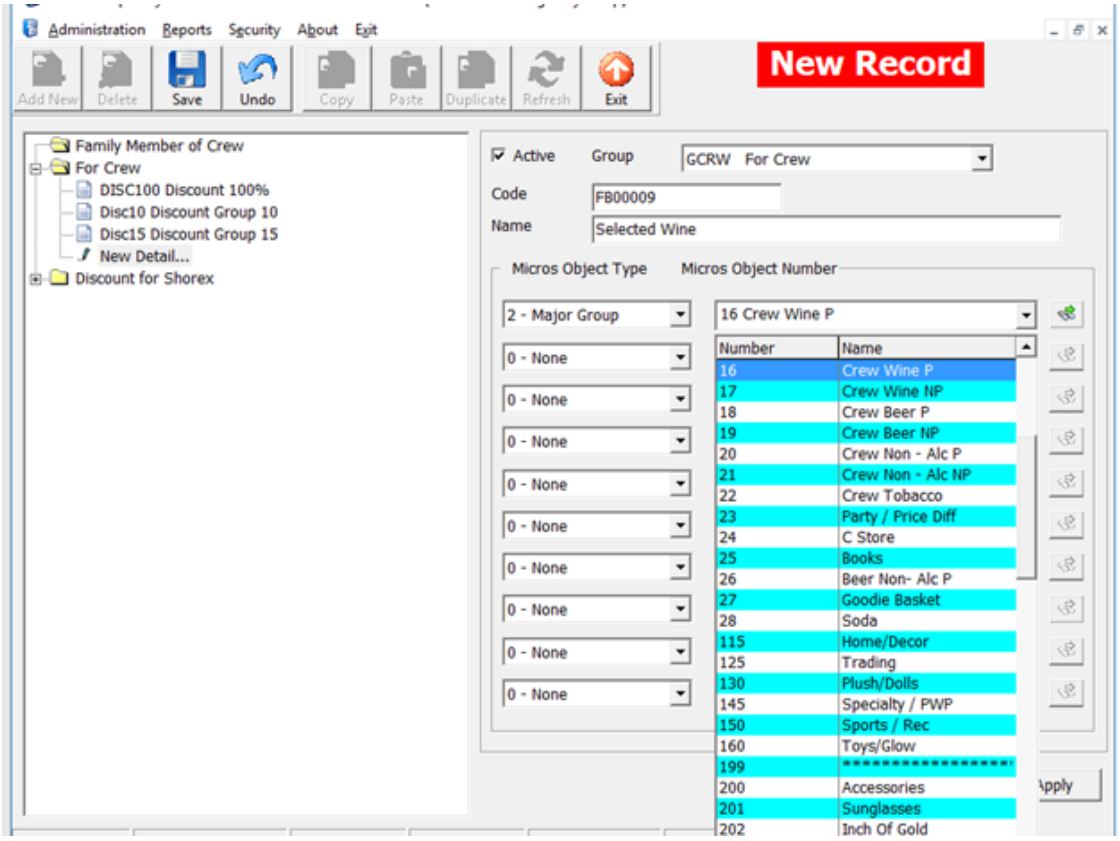
The POS Discount Eligibility Group is the first set of configurations for the Advance POS Discount, defining the group eligible for a specific POS discount.

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To configure, repeat the steps in the POS Discount Level Setup.

POS Discount Eligibility Setup

Figure 23-3 POS Discount Eligibility Setup



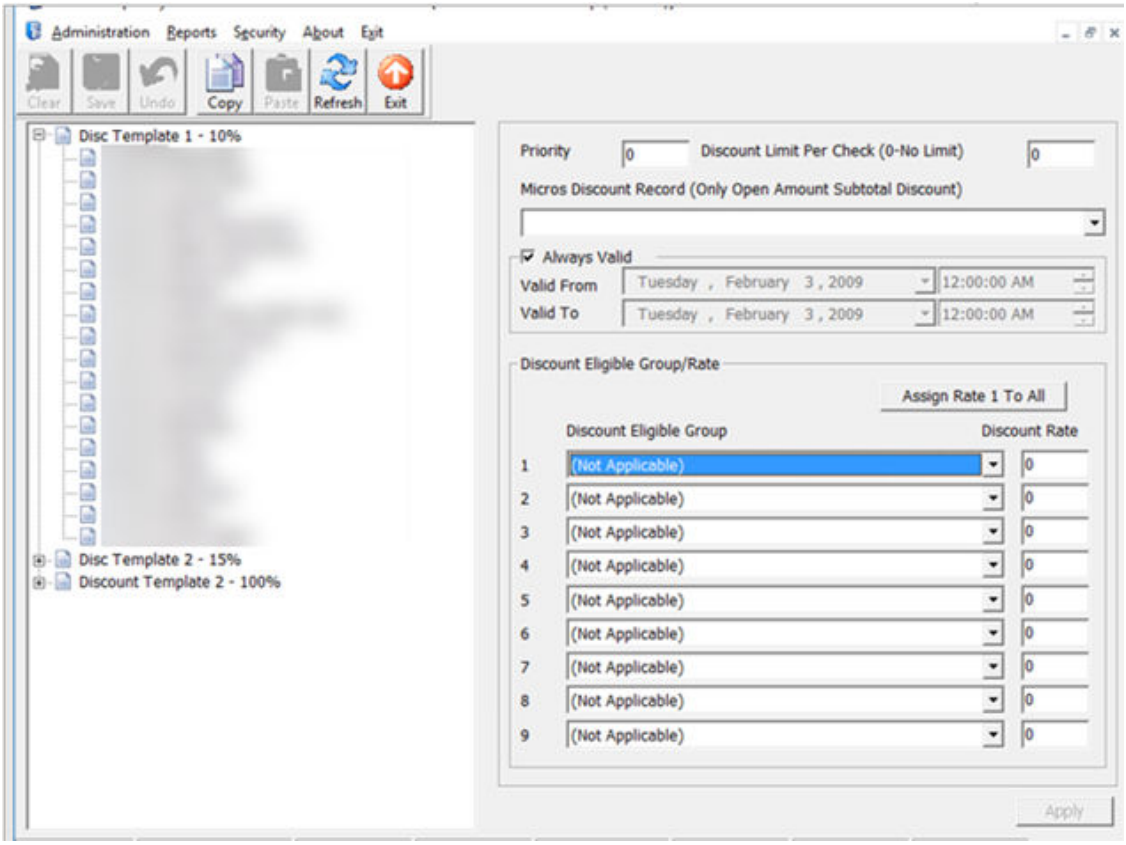
1. From the **Administration, POS Discount** menu, select **POS Discount Eligibility Setup**.
2. In the POS Discount Eligibility Setup window, click **Add New** on the ribbon bar.
3. In the Group field, select a group from the drop-down list.
4. Enter the code and the name.
5. Go to the **MICROS Object Type** section and select one of the following options; 0 = None, 1 = Menu, 2= Major Group, or 3 = Family Group
6. Select the respective item from the MICROS Object number drop-down list or click the **Binocular** icon to search.
7. To enter more menu items, repeat the steps above.
8. Click **Apply** to save.

POS Discount Rate (Advance)

The POS Discount Rate (Advance) is the final part of the Advance POS Discount. This is used to define the discount eligible group per POS discount level, using a specific discount rate, and supports up to nine discount groups per revenue center.

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Figure 23-4 POS Discount Rate (Advance)



1. From the **Administration, POS Discount** menu, select **POS Discount Rate (Advance)**.
2. Repeat steps 2 to 5 of the POS Discount Rate Setup.
3. The **Always Valid** is selected by default. Deselect the checkbox if you need to change the validity period.
4. In the **Discount Eligible Group/Rate** section, select the discount group/rate from the drop-down list.
5. In the **Discount Rate** column, enter the discount percentage.
6. Repeat steps 4 and 5 if the POS Discount Level has more than one discount eligibility group.
7. If the discount applies to all itemizers, click **Assign Rate To All**.
8. Click **Apply** to save.

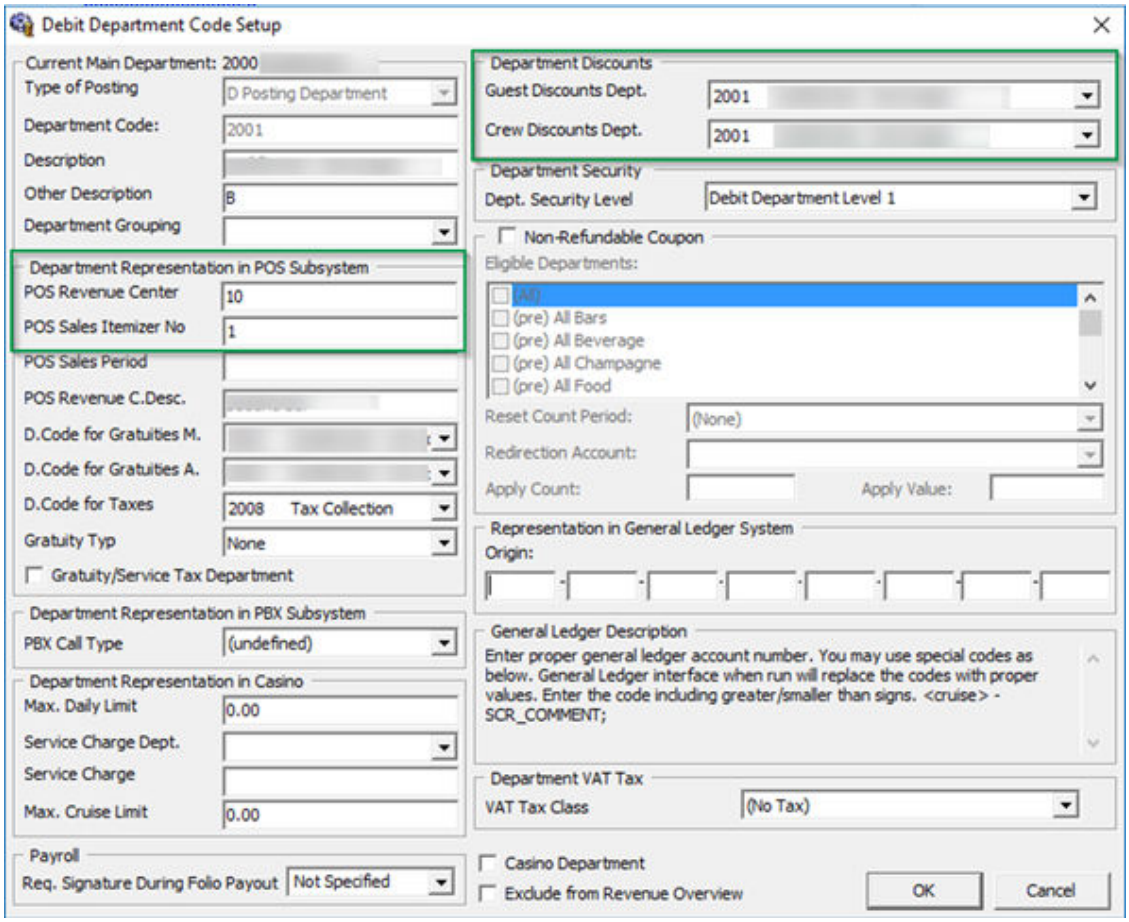
POS Discount Department

To track the respective POS Discounts usage, provide a separate Financial Department code is needed for each debit department and the code must link to a POS Sales Itemizer. The current Sales Itemizer discount department for Food, Beverage, Alcohol, and others are configured for the basic discount posting.

To separate the POS Discount amount from the regular discount, you must set up a sale itemizer separately for the POS Discount posting department.

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Figure 23-5 Discount Debit Department



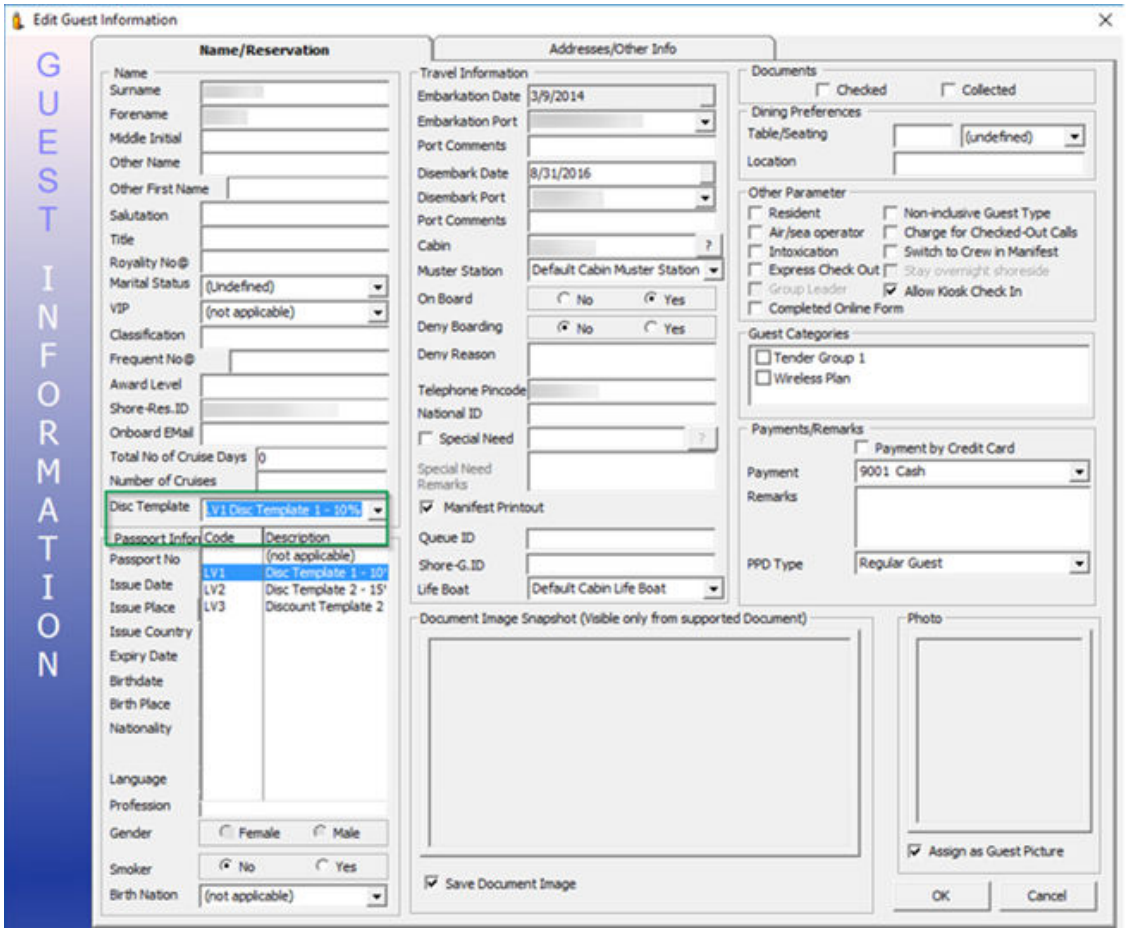
For each Debit main department code, create a sub-department for the POS Discount sale itemizer as shown in the above figure. You must link the **Guest/Crew Department Discount Department** to the **POS Discount Posting Department Code.**

You can set up the POS Discount level individually in a guest account from the **New Guest Information** and/or the **Edit Guest Information** window, and this would determines the applicable discount rate on the guest check. The eligible discount rate for a guest is sent to POS through the Oracle Simphony when you swipe the guest board card at the outlet.

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Assigning Discount Level in Management/Crew Module

Figure 23-6 Disc Template Assignment in Edit Guest Info



1. Log in to the **Management** module and select **Cashier, Guest** from the drop-down list.
2. In the **Guest Info** tab, click **Edit Information** of the selected guest.
3. In the Edit Information window, **Name/Reservation** section, select the POS Discount level from the **Disc Template** drop-down list.
4. Click **OK** to save. The Assigned Disc. Template appears in the Guest Info tab, Passport Information section.
5. Go to Guest Handling, select the **guest record**, and click the Disc, Route, Pkg tab, it displays the eligible POS Discount/Discount department information in the MICROS Discount and MICROS Advance Discount tab.

Table 23-2 MICROS POS Tabs and Descriptions

Tab	Description
MICROS Discount	Displays the MICROS Discount Itemizer for the Basic POS Discount.

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Table 23-2 (Cont.) MICROS POS Tabs and Descriptions

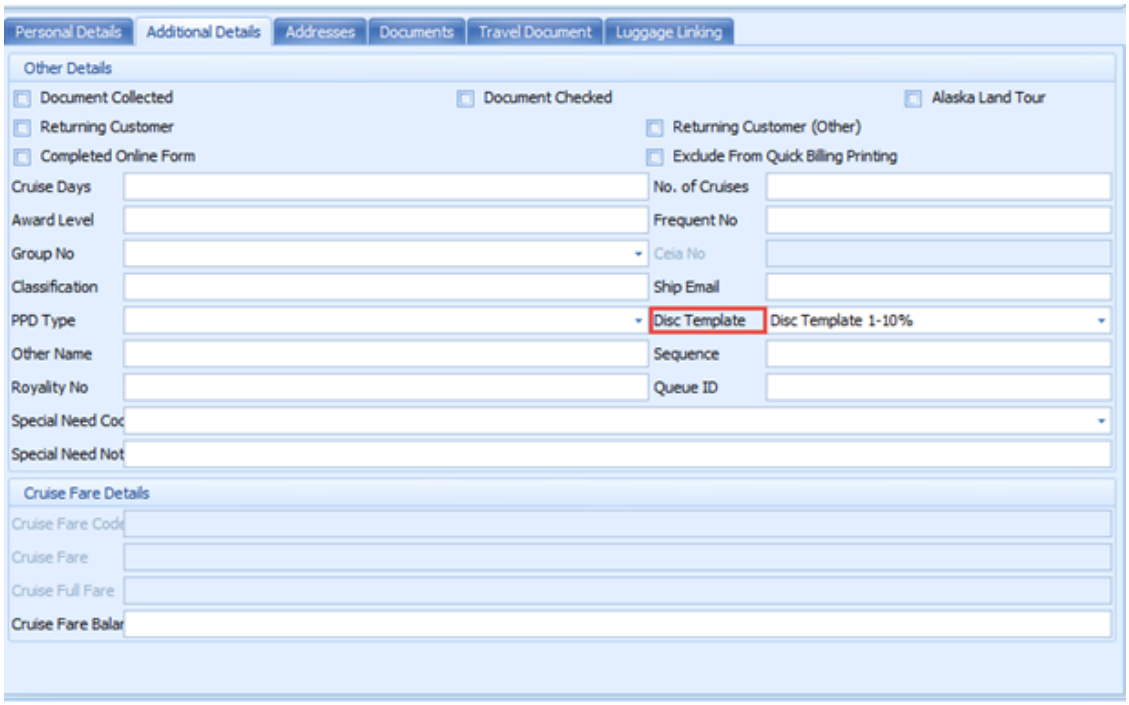
Tab	Description
MICROS Advance Discount tab	Displays the Advance Discounts Items such as Menu Item/Family Group/Major Group Details.

Assigning Discount Level in Quick Check-In Module

The assignment of discounts in the Quick Check-in module varies, depending on the layout.

To enable the **Disc Template** drop-down list visibility in ONE TAB, TWO TABS, or FOUR TABS format, make sure the **Loyalty Discount** field column is set to **Visible, Editable in AQCI Setup, Field Definition, Additional Details** tab.

Figure 23-7 AQCI Discount Template Field

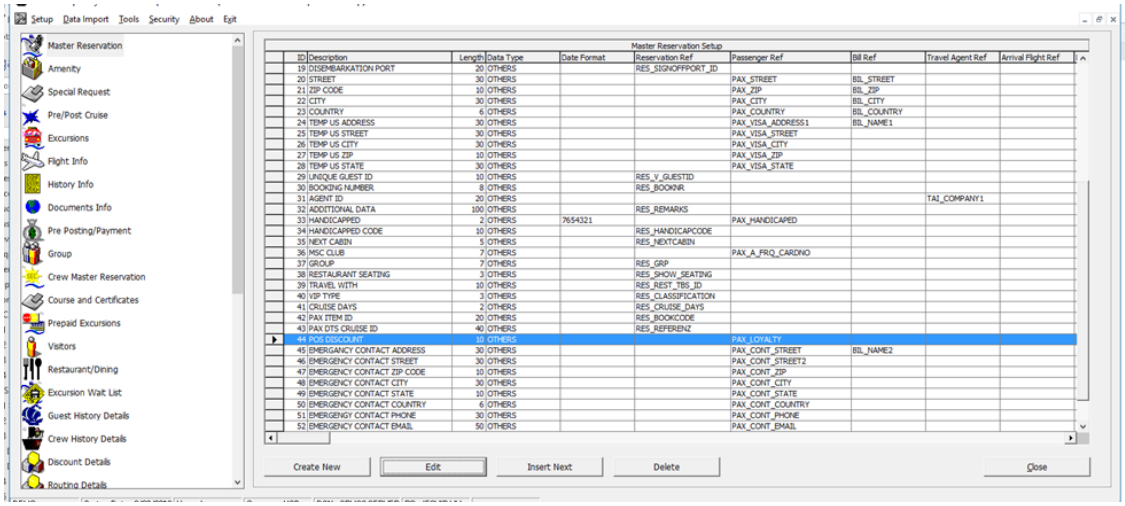


Importing Reservation with POS Discount Level using Data Import

You can import the POS Discount status assigned to the reservation using the Data Import module as depicted below.

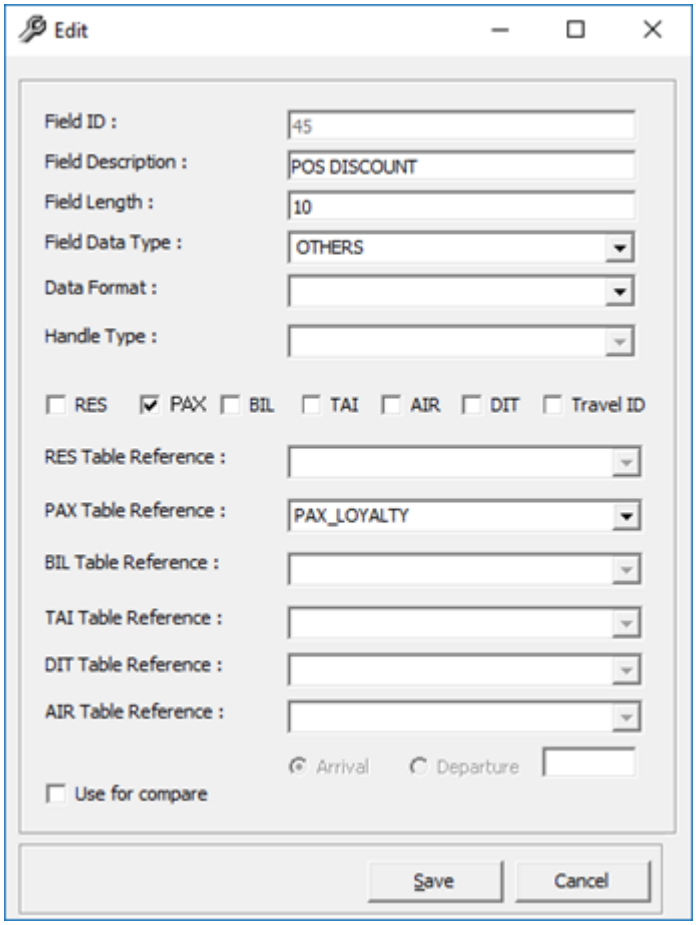
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Figure 23-8 Data Import



1. Open the **Data Import** application.
2. In the **Setup** menu, select **Reservation Related** from the drop-down list.
3. In the **Master Reservation** window, select a line and click **Insert Next** to add a new field.

Figure 23-9 Edit Data Import Fields



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4. Enter the required information.
5. Select the **PAX** checkbox and select **PAX_LOYALTY** in the PAX Table Reference drop-down list.
6. Click **Save** and click **Close** to exit.

> **Note**
>
> The reservation manifest should contain the POS Discount code, for example, FIRST, ONE, TWO, THREE, FOUR, and FIVE for reservation with POS Discount status.

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24

Currency Exchange

The Currency Exchange program manages currency exchange accepted by the ship throughout its voyage, at a predefined exchange rate.

Currency Exchange Setup

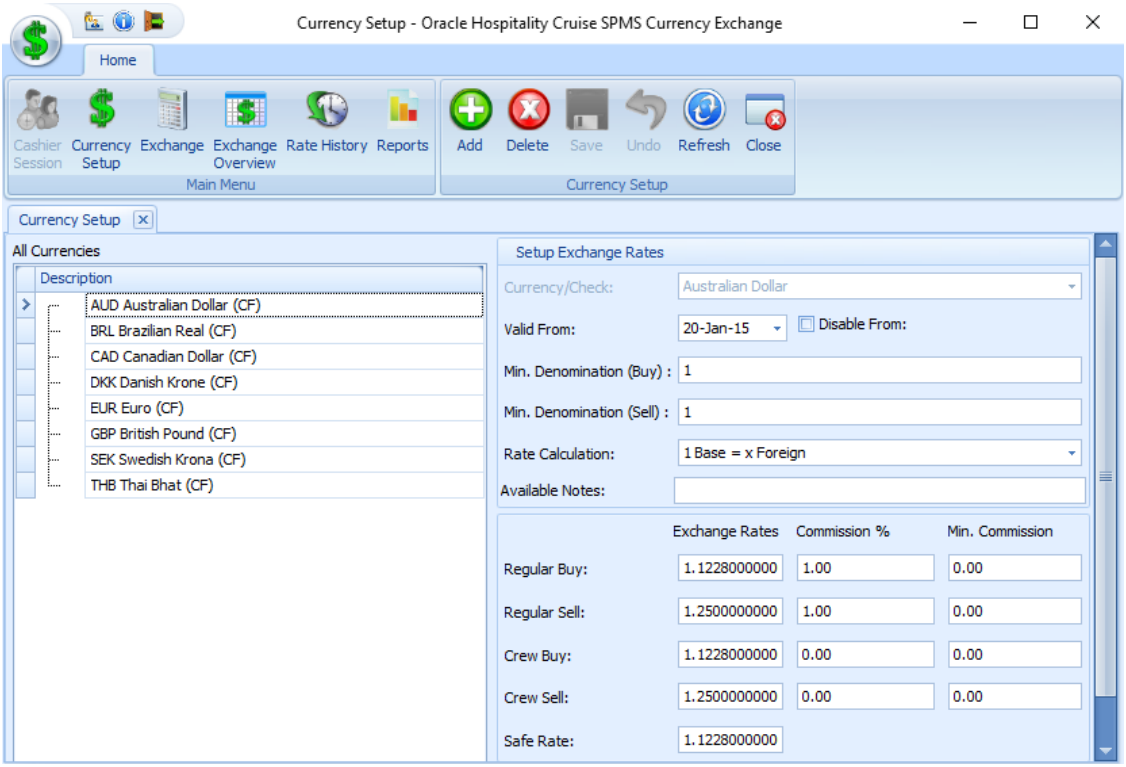
The following section describes the setup rules for Currency Exchange module and its function.

Currency Code and Exchange Rate Setup

You will need to have a Credit Posting department for each currency accepted by the ship. This is set up in Administration module, Financial Code setup. See *Administration Chapter* for more information on how to setup the codes.

Set up the Financial Codes, you can then enable the currency code and set the exchange rate in Currency Exchange module.

Figure 24-1 Currency Setup



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Adding Currency Code and Exchange Rates

1. Log in to the **Currency Module**.
2. At the Home tab, click **Currency Setup** and then click **Add** to setup a new Currency.
3. At the Setup Exchange Rates section, select the currency type from the **Currency/Check** drop-down list.
4. At the **Valid From** field, select the Validity Period for the exchange rates to take effect. Checking the **Disable From** checkbox prompts for a date to end the validity period.
5. The default denomination for banknote and coin is one. Change the value if necessary.
6. The **Rate Calculation** is divided into two categories:
   - 1 Base = x Foreign (Default)
   - 1 Foreign = x Base
7. Enter the exchange value of that currency. The Exchange Rate is definable by its Operation Types:
   - **Regular Buy:** Rate used by the ship to buy foreign currency from their guest.
   - **Regular Sell:** Rate used by the ship to sell foreign currency (other than the base currency) to the guest.
   - **Crew Buy:** Rate used by the ship to buy foreign currency from its crew members.
   - **Crew Sell:** Rate used by the ship to sell foreign currency to crew members.
   - **Safe Rate:** Rate used by the Vendor setup.
8. Enter the value in either one of the commission field or both. The **Commission** charged is based on the value defined. If both the **Commission percentage** and **Min. Commission** have a value, the system will post the higher calculated value for that transaction. The **Min. Commission** applies when the calculated commission by the percentage is less than the value specified in the commission amount.
9. Click **Save** at the ribbon bar to save the changes.

Editing Currency Exchange Rate

1. At the Currency Setup screen, select the currency type.
2. Enter the **Exchange Rates** in the Exchange Rates section and click **Save** to update the rate. Once saved, you cannot undo the change.

Removing Currency Exchange Rate

To remove the date, select the currency type from the drop-down list and click **Delete**.

Commission Charge Code and Account

By default, the system stores commission posted in currency transaction table if the System Account is not available. If the ship operator wishes to track all commissions received through Currency Exchange module, this would require a Debit and Credit Financial Posting code and System Account. The commission applicable to buy or sell is dependent on the parameter defined in **System Setup, Database Parameters, Exchange Group**.

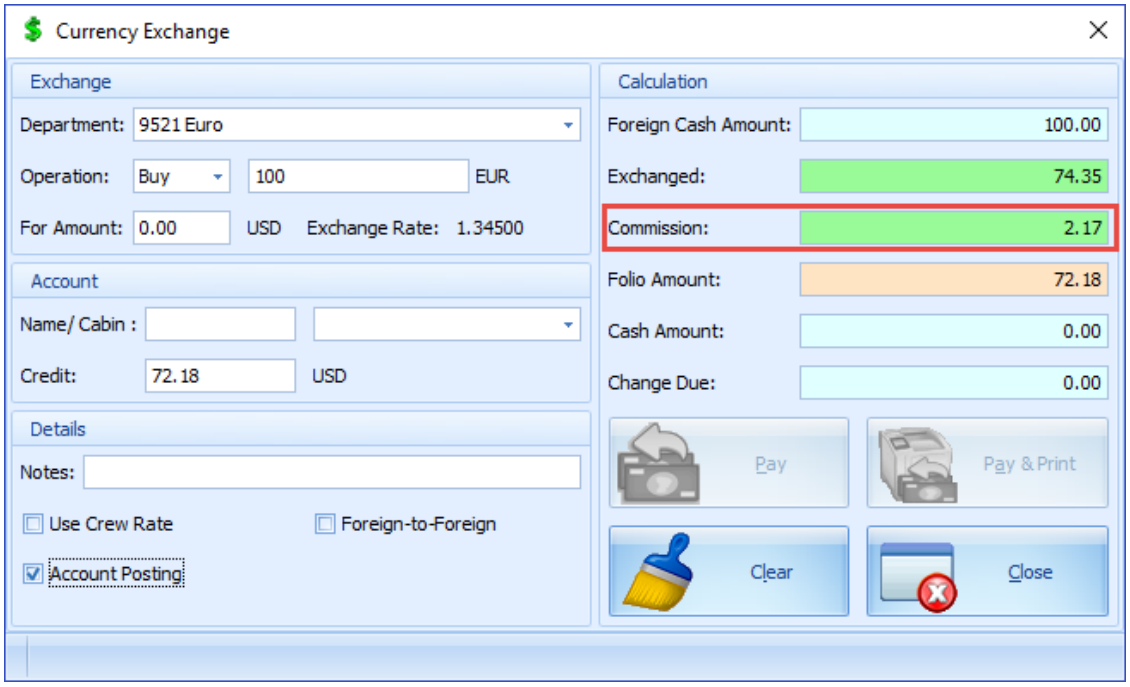
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- Curr. Exch. Commission Type
- 2Way Commission Type (for Foreign to Foreign Exchange)

Below are examples of currency exchange with the commission and the formula use to calculate the commission value.

To exchange €100 to USD that has applicable commission at 3 percent. The calculation formula is (€100/1.345) = $74.35. Hence the applied commission is $2.17 ((€100/1.345)/3%)).

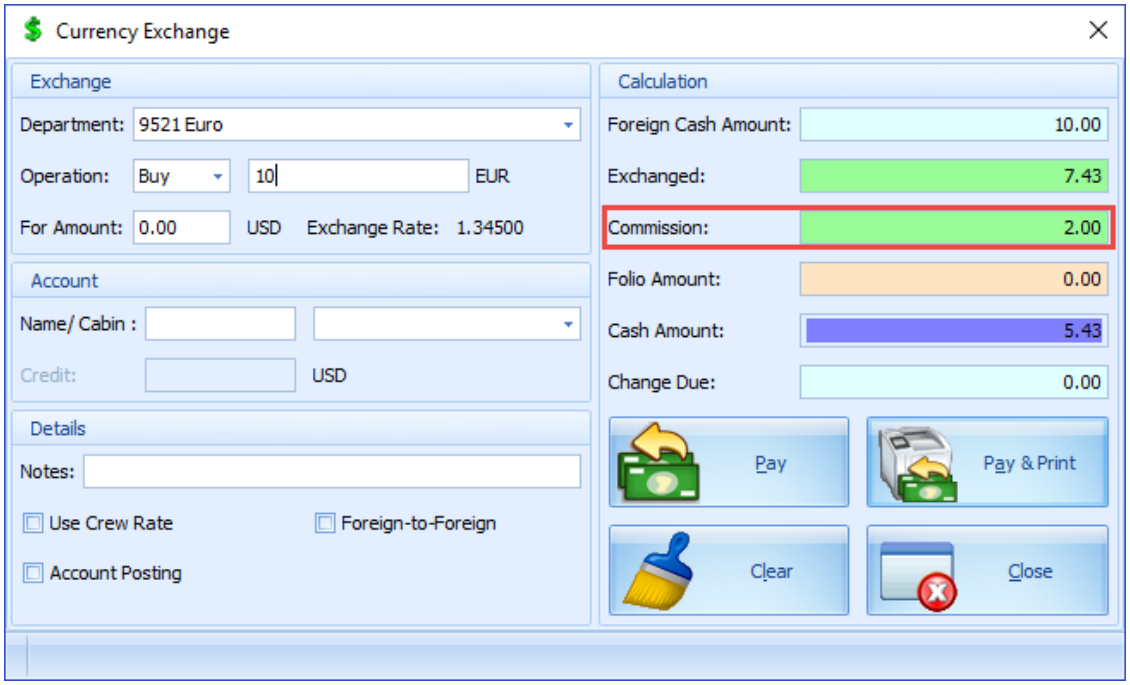
Figure 24-2 Commission by %



To exchange €10 and minimum commission is $2.00, the calculation formula is (€10/1.345) – $7.43 x 3% = $0.0223. Since the calculated value is below the amount specified, the system will post $2.00 as the applicable commission. Hence, the guest only receives $5.43.

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Figure 24-3 Minimum Commission Charged



Setting Up Commission Charge Code

1. Run the **Administration** module and select **Financial Department Setup** from the drop-down list.
2. At the Credit tab, click **New** to create a credit department.
3. Select the Payment Type as **CB Cash Payment** and enter a value in **Department Code** and **Department Description.**
4. Under the POS Subsystem section, **System Account No** field, assign the System Account number to link the account. Account number *must* not be identical to **Department Code**.
5. Click **OK** to save and then navigate to Debit tab.
6. Click **New** in the Debit tab to create a debit department.
7. Select the Type of Posting as **D Posting Department** and enter a value in **Department Code** and **Department Description**.
8. Click **OK** to save, then **Close** to exit.
9. Once both the credit and debit codes are set up, update them in the **Exchange Parameter** Group in System Parameter.
   - Curr. Exch. Commission Credit Dept
   - Curr. Exch. Commission Dept

Setting up System Account

1. Run the **Management** module.
2. Select **System Account** from the **Cashier** menu,
3. Click **Insert New** to create a new account.

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4. Enter the **Account No, Name** and select the **Payment** and **Access Priv** from the drop-down list.
5. Check the **Posting Allow** checkbox.
6. Click **OK** to save.

Performing Currency Exchange Transaction

The onboard base currency is pre-determined by the cruise operator and may change by voyage, depending on the country the ship's destination country. In this function, you can perform a buy and sell operation over the counter or post to an account. If you want to have the exchange posted to an account, you must enable the following parameter.

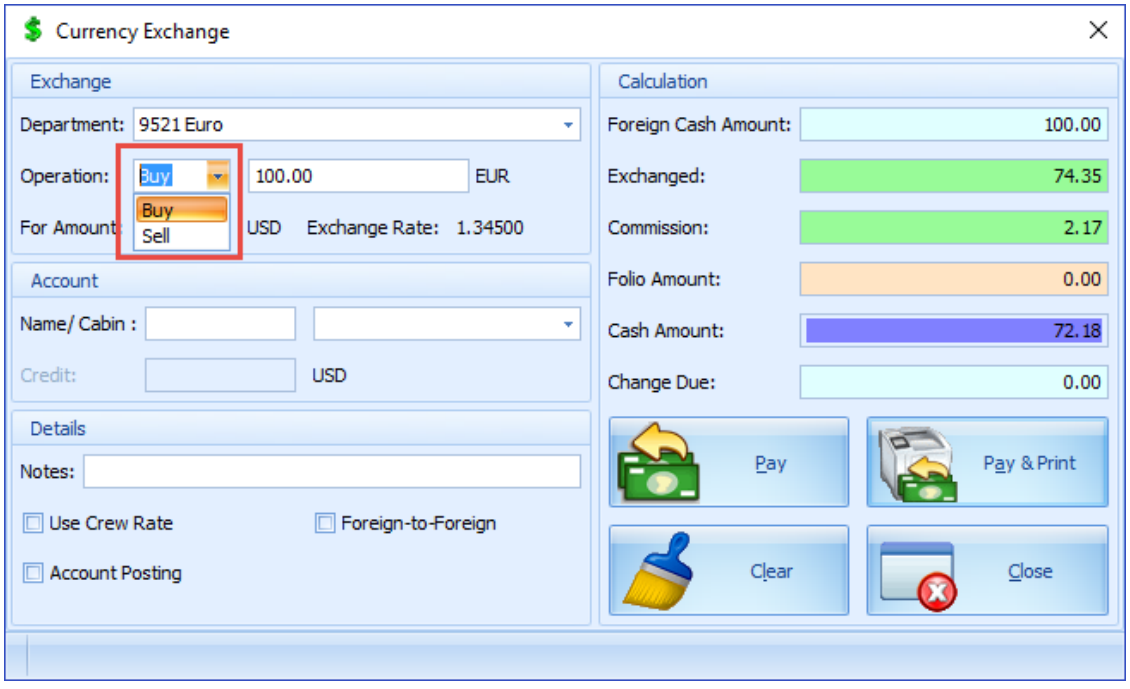
- Enable Account Postings
- Account Info Name Cabin Mandatory Option
- Curr. Exch. Charge Department

Buy Sell Currency Exchange

The total cash out amount is determined by the buy / sell exchange rate and commission defined in the Currency Exchange Setup. The steps to perform an exchange are the same for both buy and sell.

- **Buy Operation:** The ship operator buys foreign currency other than the base currency.
- **Sell Operation:** The ship operator sells foreign currency, other than USD to the guests. For example, the base currency is US Dollar (USD) and the ship is selling foreign currency, other than USD to the guests.

Figure 24-4 Currency Exchange



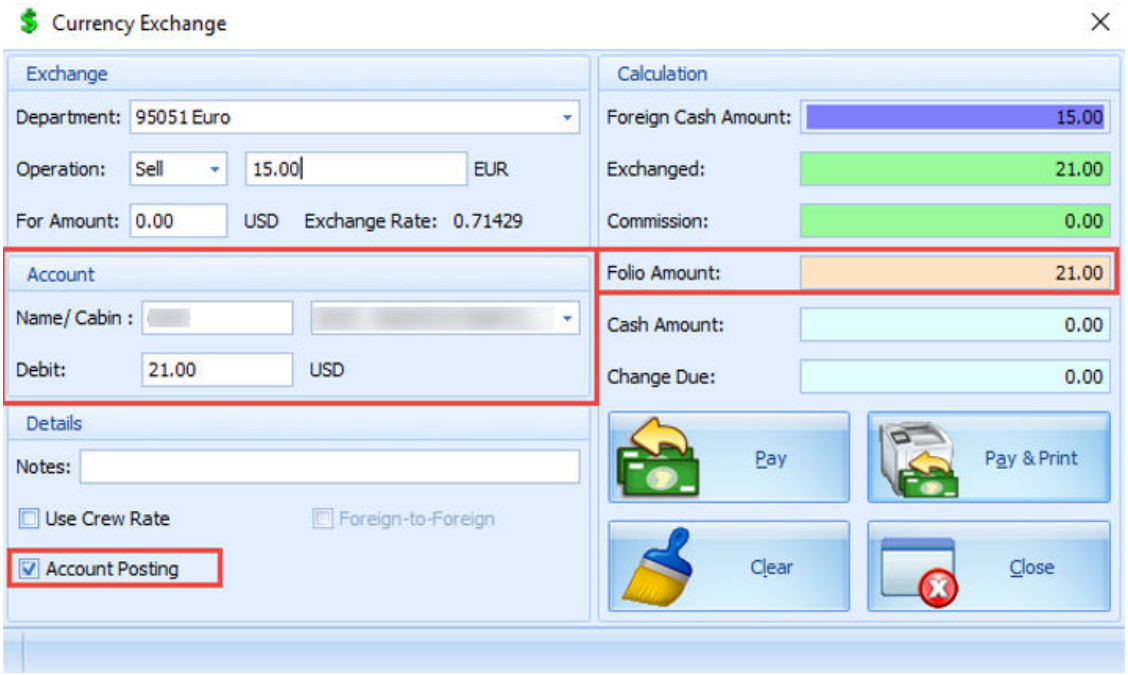
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1. Click the **Exchange** button.
2. At the **Department** field, select the currency from the drop-down list.
3. In **Operation** field, select **Buy** or **Sell**, and then enter in the amount accordingly.
4. The exchange rate of the selected currency is auto-populated, with the conversion value reflected at the **Calculation** pane.
   - **Foreign Cash Amount** is the amount to be converted in foreign currency.
   - **Exchanged** is the converted amount in base currency.
   - **Commission** is the commission applied to the converted value.
   - **Folio Amount** is the amount charged to the folio.
   - **Change Due** is the change due to guest in base currency.
5. Complete the process with
   - **Pay** – post and payout without printing a receipt.
   - **Pay & Print** – to post and print a receipt.
   - **Clear** – Clears the information on the exchange form.
   - **Close** – Closes the form.

Exchange Charge to Account

You are allowed to post an exchange to an account only when the above-mentioned parameters enabled.

Figure 24-5 Exchange Charged to Account



1. Repeat steps 1 to 4 of Buy/Sell Currency Exchange.

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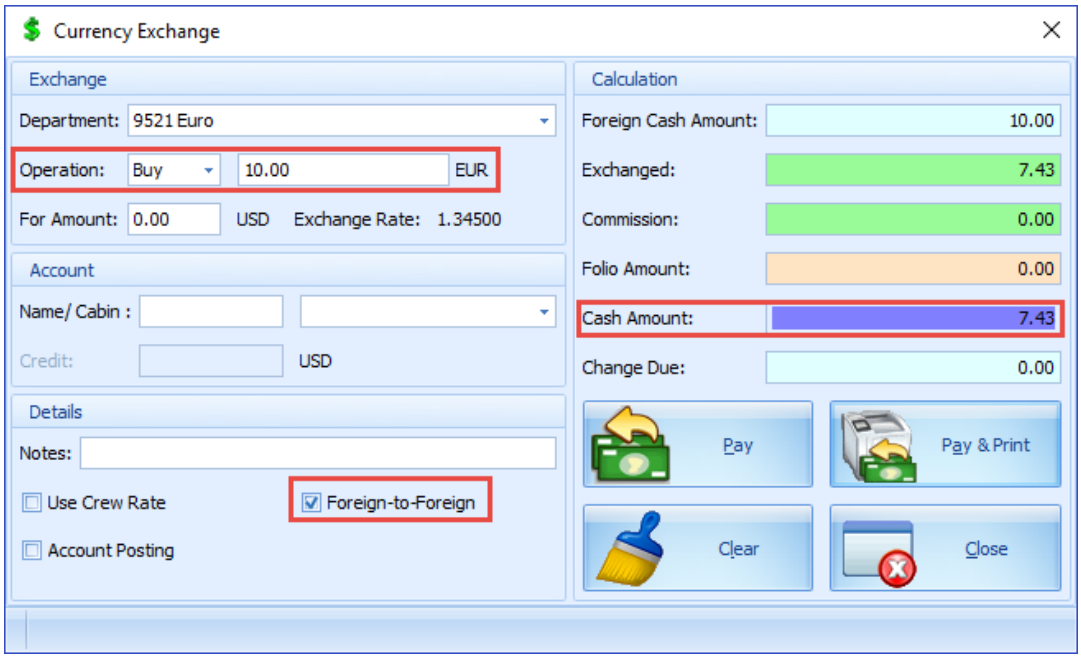
2. At the Account section, enter the **Name/Cabin number**.
3. Check the **Account Posting** checkbox in the Details section to update **Folio Amount** in Calculation section and post to the account. If the Folio Amount remains as 0.00, this means only the guest information is recorded, and the transaction is not posted to the guest account.
4. Click **Pay** or **Pay & Print** to complete the transaction.
5. The transaction shown either as Credit (buy) or as Debit (Sell) in the guest invoice.

Foreign to Foreign Exchange

This feature enables the ship to trade foreign currencies against its base currency by combining both the Buy and Sell processes in a single transaction; for example, an exchange from Euro to British Pound and the base currency is US Dollar. The Foreign-to-Foreign exchange is a two-step process, where the first currency conversion is performed using Buy Currency followed by Sell Currency.

1. Select **Exchange** from the ribbon bar.
2. At the **Department** field, select the currency type from the drop-down list.
3. In **Operation** field, select **Buy** and enter the amount accordingly.
4. Under the Details section, check the **Foreign-to-Foreign** checkbox.

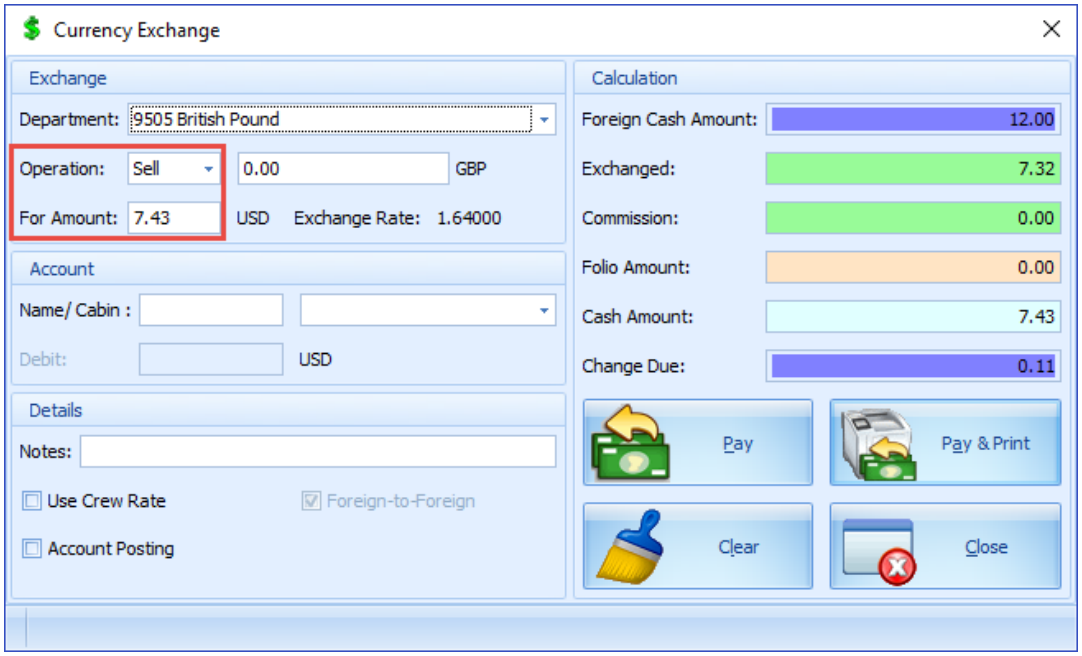
Figure 24-6 Foreign to Foreign (Buy)



5. Click **Pay**, and the system automatically open another form with a **Sell** operation and inserts the value in the **For Amount** field.

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Figure 24-7 Foreign to Foreign (Sell)



6. Select the second currency type from the drop-down list.
7. Click **Pay** to complete the exchange.
8. If the commission is applicable, it is calculated based on the Parameter setting.

Shift Balancing

Maintaining a balanced accounts and floats on each shift is essential, and this function describes the steps used to reconcile all transactions posted by each shift cashiers. To use this feature, you must enable the parameter **Cashier, Use Full Cashier** in **Administration, System Setup**.

Open Cashier Session

At the beginning of each shift, as a designated cashier, you must open your cashier session by registering the available float amount into the cashier session. There are two (2) options to open the cashier sessions:

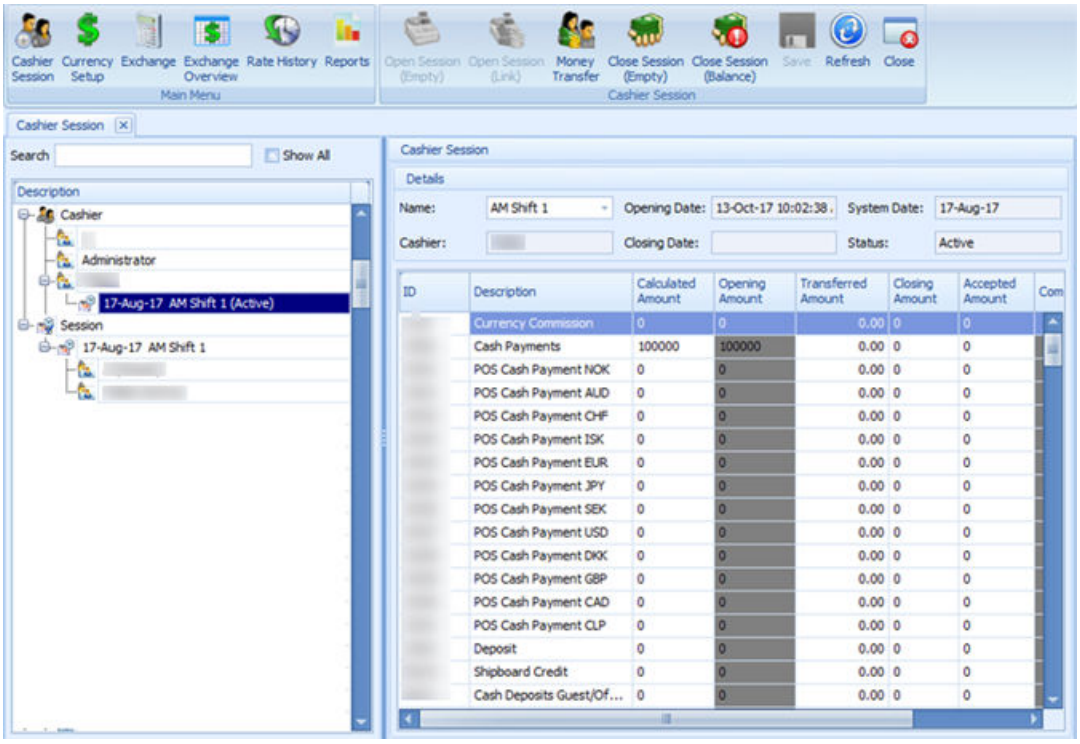
- **Open Session (Empty)** — Opens a cashier session for the selected unit.
- **Open Session (Linked)** — Opens a cashier session and links the previous closing balances to the Opening Amount.

Open Session (Empty)

1. At the ribbon bar, select **Cashier Session**.
2. Expand the **Cashier** container by clicking the “+” symbol.
3. Select the user name, and click **Open Session (Empty)** at the ribbon bar.

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Figure 24-8 Exchange Transactions with Cashier Session (Open Session)



4. At the Details section, select the Name from the drop-down list.
5. In the **Opening Amount** field, enter the amount for the department code. Use the **Tab** key to navigate.
6. Click **Save** at the ribbon bar. This changes the cashier session from Opening to Active and is reflected in the **Session** container.

Open Session (Linked)

The steps to open a linked cashier session is the same as Open Session (Empty). Instead of selecting Open Session (Linked), select **Open Session (Linked)**.

Exchange Transactions with Cashier Session

All currency exchange transactions performed are stored in the cashier session. Enabling the **Cashier, Show on-board currency** parameter with the On-board currency Financial Department displays the currency in the cashier session.

When performing an exchange by cash, the system captures the cash transaction as onboard currency by default. To show the currency by the specified department, a parameter is required to record in **Calculated Amount** column of the cashier session. For example, consider a guest exchange of £200 to ship currency (US$) at the exchange rate of $1.50 with a commission of percent, and the opening balance set at 200 respectively. In this instance, a **Buy** transaction is used and the payout to the guest is $65.36 (£200 / 1.5 minus 2% commission charge - $130.72)

Hence the amount reflected in the cashier closing in **Calculated Amount** is:

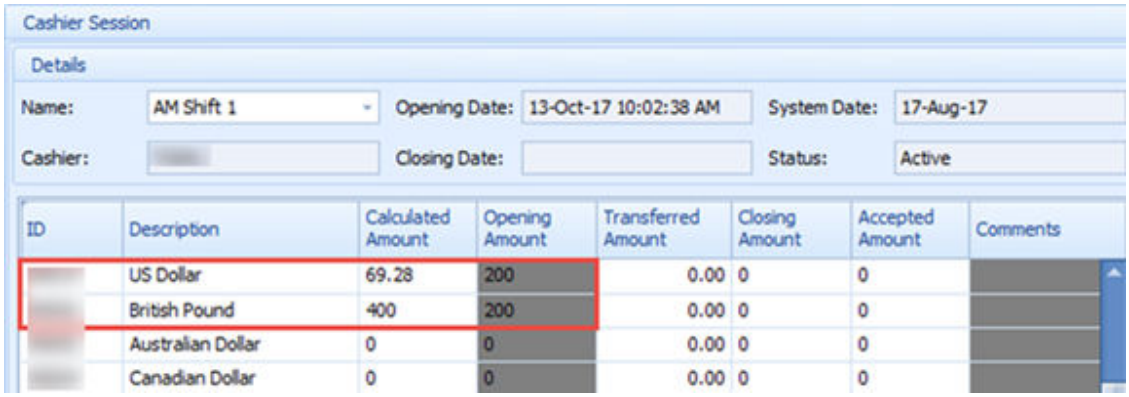
Cash Currency Exchange: $69.28 (Opening balance $200 minus pay out $130.72)

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British Pound: £400.00 (Opening balance £200 plus amount exchanged of £200)

Note that the Commission Charge is not included in the Cashier Session.

Figure 24-9 Exchange Transactions with Cashier Session (Balance)



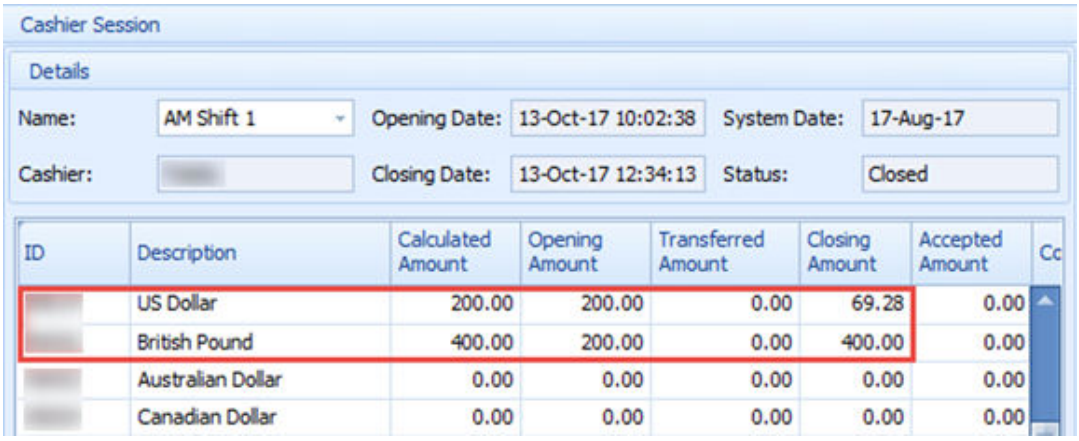
Close Cashier Session

At the end of each shift, you must balance and close your shift postings and submit a report of your collection to the Finance Department.

Close Session (Balance)

1. At the **Cashier Session**, expand the **Session** container by clicking the “+” symbol.
2. Expand the date and select the active user session.
3. Click **Close Session (Balance)** at the ribbon bar. The Closing Amount is calculated automatically.
4. Click **Save** to confirm closing.

Figure 24-10 Closed Session (Balance)



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Close Session (Empty)

1. Repeat steps 1 and 2 above.
2. Select the active user session and then click **Close Session (Empty)** at the ribbon bar.
3. Select the shift period from the drop-down list.
4. Enter the counted amount in the **Closing Amount** column and click **Save**.
5. If there is a discrepancy between the calculated and reported value, the system prompts an error. Selecting **Yes** sets the session Status to **Discrepancy**, allowing you to research the imbalance and close the session later.
6. Once the imbalance is found, you must close the session:
    a. Select the session as **Close Session (Balance)**.
    b. Enter the correct amount in **Accepted Amount.**
    c. Click **Save** to accept the balance.
    d. Print the Closing report at the final stage of closing.

Exchange Overview Function

The Exchange Rate History Overview provide a historical view of past exchanges, voided transactions and report generation.

Transaction Search

You can extract the historical data using the following:

- **System Date:** SPMS System Date.
- **General Date:** Current PC Date.
- **User:** Selected user who posted.
- **From Date:** Date Period Selection.
- **Module:** Module transaction posted.

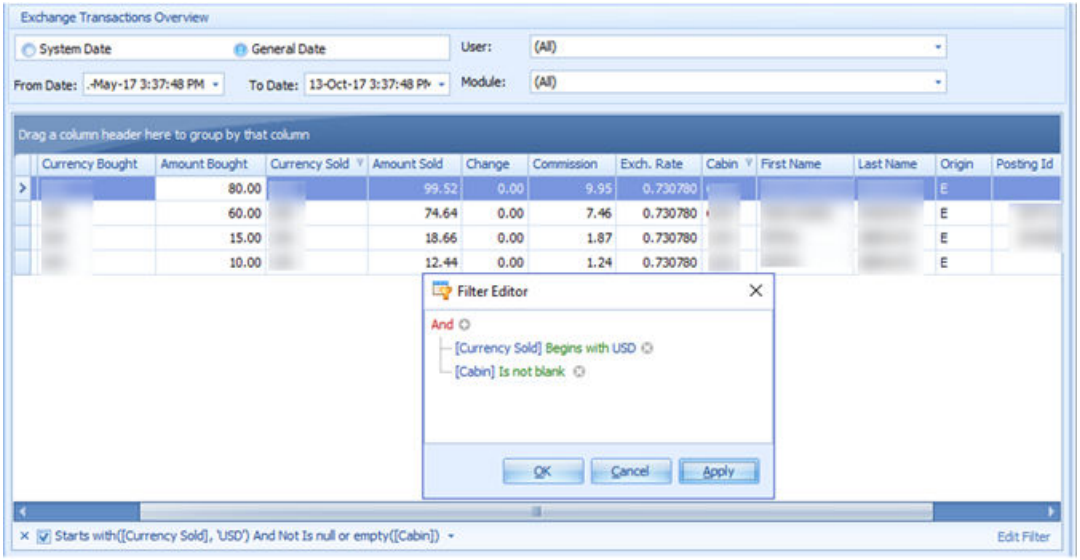
You can sort the search results by clicking the column header or using one of these options:

- **Sort Ascending / Descending**
- **Sort Descending**
- **Group By This:** Group selected columns. If more than one column is selected, it further groups the next column header and displays them in a tree view.
- **Group By Box:** Hides the tree view panes above the column header.

  Column Chooser: Permit you to select additional columns such as Posting ID and Origin.
- **Best Fit:** Auto fit the column width.
- **Filter Editor:** Customizes selection by field name, date selection, or user ID by using controls such as **Equals to, Is Greater Than,** and others. Multiple selections are possible with the Filter Editor.

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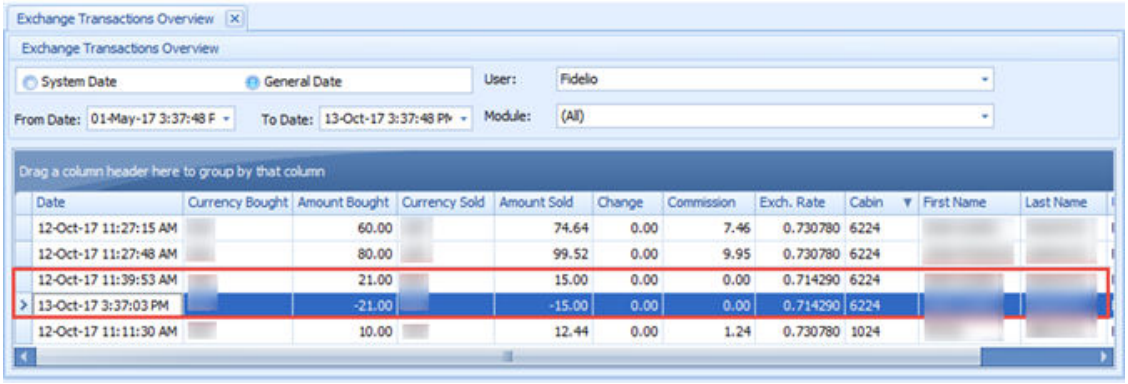
Figure 24-11 Filter Builder



Voiding a Transactions

The reverse a posted transaction.

Figure 24-12 Voided Transaction



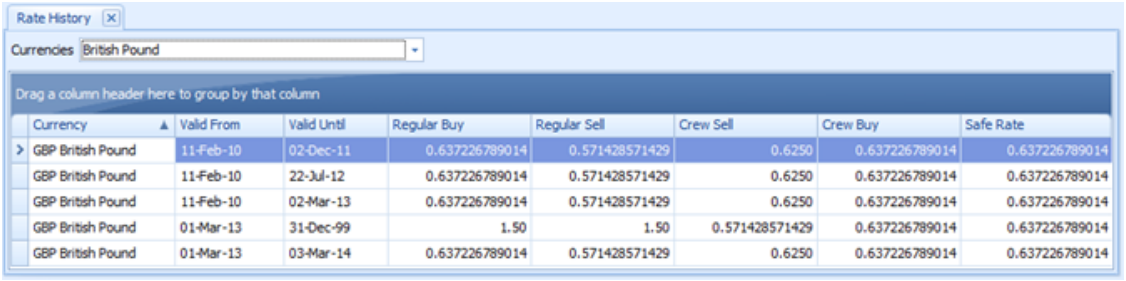
1. In the Exchange Transaction Overview screen, select the period to display using either **System Date** or **General Date, User** or **Module**.
2. Click **Search** on the ribbon bar.
3. Select the transaction to void and then click **Void** at the ribbon bar.
4. Select the void reason from the drop-down list when prompted.
5. Click **OK** to confirm. This post a negative and reverses the transaction from the guest account, if it is posted to an onboard account.

Rate History

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The Rate History stores historical exchange rates and displays them in currency order. To view historical rates, select the currency code from the drop-down list. You can group them either by column header or by using the field chooser similar to Exchange Overview function.

Figure 24-13 Overview of Exchange Rate History



Parameter

This section lists the parameters available to the Currency Exchange module. Setting these parameters alters the program behavior. Please consult Oracle Customer Support for more information on the usage.

PAR-Group_Exchange

Table 24-1 PAR_Group Exchange

PAR Name	Description
2Way Commission Type	Define the commission type to apply when Foreign to Foreign checkbox is checked. 1: Calculate Commission On Buy. 2: Calculate Commission On Sell. 0: Calculate Commission On Buy and Sell.
Account Info Name Cabin Mandatory Option	Define if the Account name is mandatory or not. 0-Not Mandatory 1-Yes, make the field mandatory
Auto Populate Account Amount Field	Auto-populate amount when posting to an account. 0: No 1: Yes only when **Enable Account Postings** is enabled.
Curr. Exch. Charge Department	Exchange Posting Department setup in Financial Department.
Curr. Exch. Commission Credit Dept.	Credit Department for commission posting setup in Financial Department. Note: Applicable to cash exchange only. The credit department must be configured Commission System Account
Curr. Exch. Commission Dept.	Debit Department for charging Exchange Commission separately.

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Table 24-1 (Cont.) PAR_Group Exchange

PAR Name	Description
Curr. Exch. Commission Type	Commission Type to apply 1: Calculate Commission On Buy. 2: Calculate Commission On Sell. 0: Calculate Commission On Buy and Sell.
Currency Exchange Daily Limit Per Crew	Define the Daily Exchange Limit Per Crew. Default = 0 (no limit).
Currency Exchange Daily Limit Per Person	Define the Daily Limit Per Person.
Currency Exchange Daily Limit Per Person.	Currency Exchange Daily Limit Per Person. Default = 0 (no limit).
Currency Exchange Monthly Limit Per Crew	Currency Exchange Monthly Limit Per Crew. Default = 0 (no limit).
Currency Exchange Weekly Limit Per Crew	Currency Exchange Weekly Limit Per Crew. Default = 0 (no limit).
Curr. Exch. Daily Exchange Threshold.	Set the daily exchange threshold at $xx.xxx per day per guest
Curr. Exch. Receipt	Default receipt printing. 0: Default enter key at ‘Pay’ button. 1: Default enter key at ‘Pay & Print’ button.
Enable Account Postings	Post currency exchange to account. 1: Enable 0: Disable

Table 24-2 PAR_Group Cashier

PAR Name	Description
Use Full Cashier	Enables the Cashier session handling in **OHC Management, Cashier, Cashier Sessions**. This enforces any purser/receptionist to open a cashier session before being able to post any transactions on any account in the system. 1: Use Full Cashier. 0: Not Use Full Cashier.
Show onboard Currency as this dept.	Displays the onboard currency in cashier session screen only.

Table 24-3 User Access Rights

Security Ref. No	Description
223	Change Currency
267	Currencies
370	Enable Crew Rate
395	Exchange Rate History

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25

Service Charge

The Service Charge module calculates and distributes the Hotel Service Charge (HSC) and Beverage Service Charge (BSC) collected during the voyage to eligible crew members, following a predefined algorithm.

Configuring Service Charge Codes

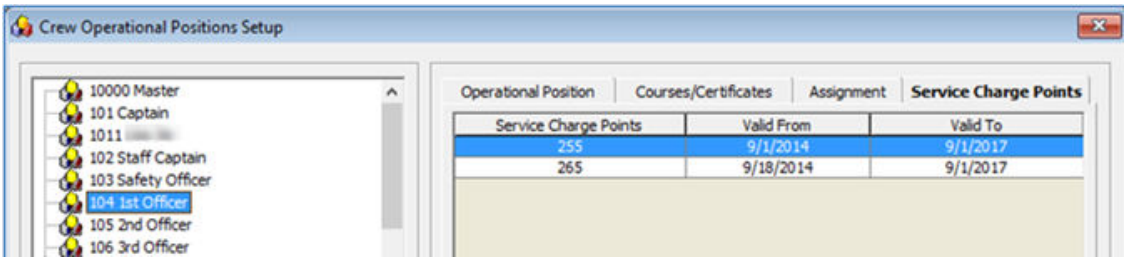
The Hotel and Bar Service Charge is distributed to participating crew members using the points system. Configuring the correct codes and associating the points ensures the service charge distributed accurately based on the crew position and the allocated points.

Operational Positions Points

The Operational Positions Points are imported by the DGS CMS Ship Transfer. The position-points used for service calculations are shown in this is a view-only window.

1. Login to Administration module, **Administration, Crew Setup, Operational Positions**.
2. Select a crew operational position. The **Service Charge Points** tab shows the service charge point. The points shown are for overview purposes only. All changes are performed in the Crew Management and Payroll Shipboard System (CMS), and then imported to SPMS using DGS CMS Ship Transfer.

Figure 25-1 Operational Positions Setup

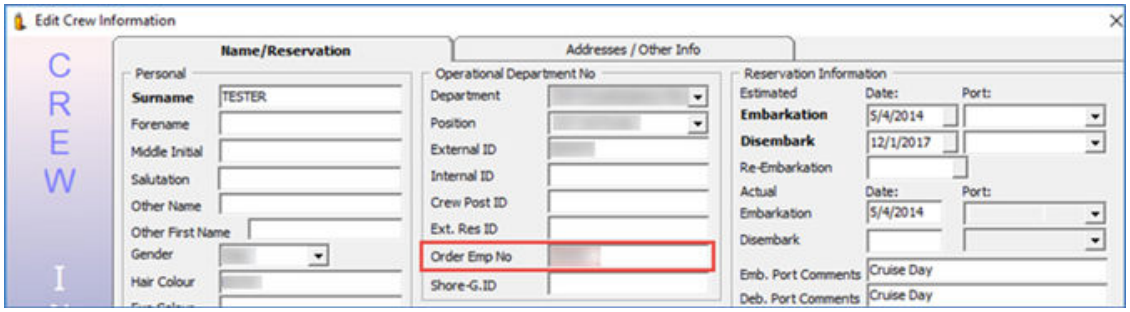


Crew POS Employee ID

All crew members eligible for service charge distribution must have a POS employee ID assigned to enable the Crew Purser to generate the Bar Service Charge (BSC). Each posting from the Food and Beverage (F&B) outlet is linked to the crew POS employee ID and the Point-of-Sale (POS) system is responsible in providing the employee ID.

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Figure 25-2 POS Employee ID



1. Log in to the Crew module, **Crewmembers**.
2. Search for the Beverage Staff or Room Service Stewards crew member.
3. Select the crew member and click **Edit Information**.
4. In the **Name/Reservation** tab, **Operational Department No**, enter the crew member employee ID in the **Order Emp No** field.
5. Click **OK** to save and repeat the above steps for all Beverage Staff or Room Service Stewards. The same steps apply to the new joiner that has a new employee ID card assigned.

Crew Eligible Start and End Date

The Service Charge distribution to the crew is based on the eligibility date range. The Eligible Start Date and Eligible End Date are defaulted to the actual embarkation date and expected debarkation date.

1. Go to the Crew module, **Crewmembers, Edit Information, Addresses/Other Info** tab.
2. The service charge **Eligible Start Date** and **Eligible End Date** are in the Hotel & Bar Service Charge section.
3. A change of crew debarkation date updates the **Eligible End Date** field automatically, based on the **Service Charge Eligible End Date** parameter. Change the start date and end date if date if they differ from crew embarkation date and debarkation date.
4. You can adjust the **Eligibility Start Date** to a date later than embarkation date and not earlier. If the **Contract End Date** is changed as a result of crew member check out, then the eligibility date will not change.
5. The Ship operator can adjust the **Eligibility End Date** if the crew member is not eligible for service charge calculations for the last voyage of contract due to dismissal, misconduct, or any other approved reason.
6. The **Eligible Start Date** and **End Date** default to NULL if the crew reservation is a No Show or Cancelled status.

Pool Distribution

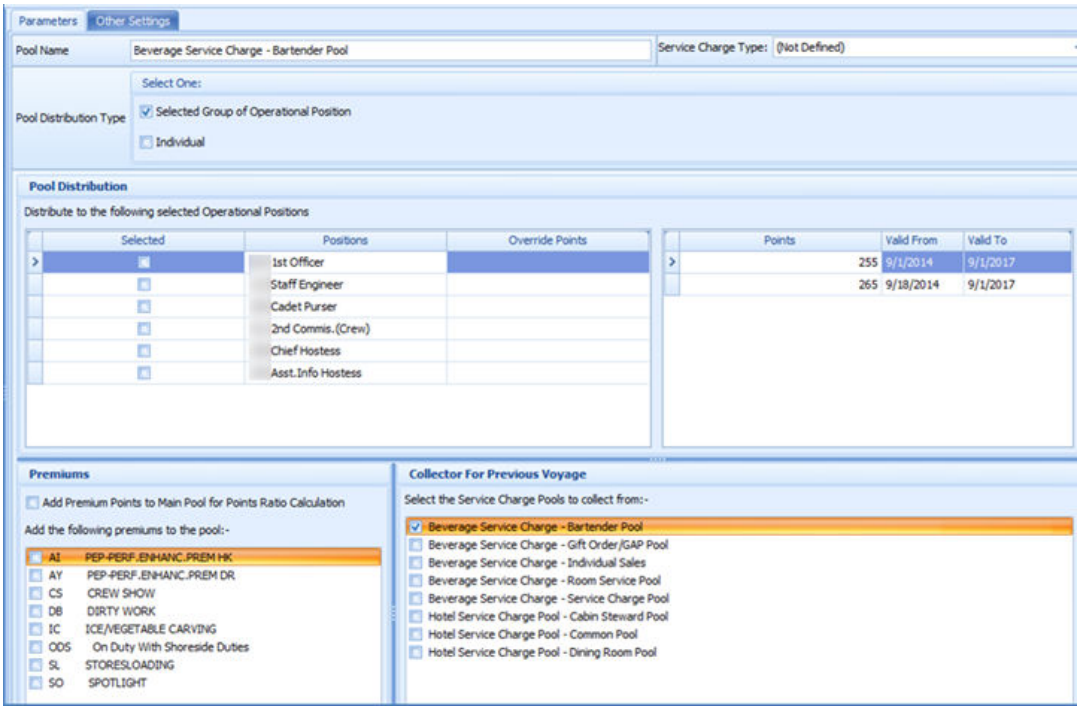
The Pool Distribution setup determines the type of the hotel and bar service charge distribution pool, either by selected crew operational position or individually.

1. Run the Service Charge module.
2. At the ribbon bar, click **Pool Distribution**.

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3. At the Service Charge Pool Distribution ribbon bar, click the **Add** button to create a distribution pool.

Figure 25-3 Pool Distribution Parameters



4. At the Parameter tab, enter the following details.

Table 25-1 Pool Distribution Parameters

Field Name	Description
Pool Name	The name of the Distribution Pool
Service Charge Type	The type of service charge in Bar Service Charge or Hotel Service Charge. This is to calculate one of the following option: • hotel and bar service charge • hotel service charge only • bar service charge only.
Pool Distribution Type	Distribution Type, either by group of operational position or individual. If “Individual” distribution type is selected, the Operational Positions checkboxes in Pool Distribution is disabled.
Pool Distribution	Select an **Operational Position**. The amount collected in this pool will be distributed to the crew member based on the selected operational position. The Override Point is an option to define different points for different positions in different pool. When processing the distribution calculation, the program will use the override point if it exist. If not, the program takes the default point.

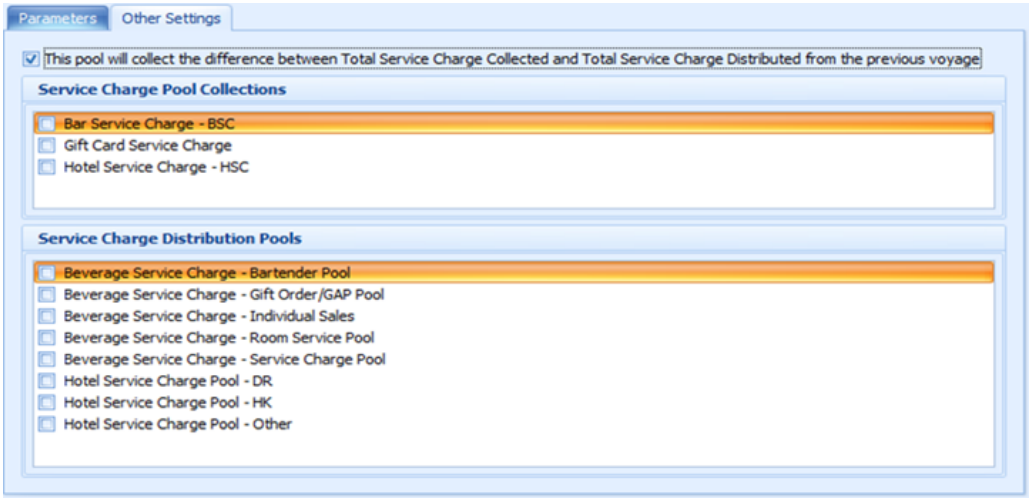
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Table 25-1 (Cont.) Pool Distribution Parameters

Field Name	Description
Point	The Default Point refers to the Service Charge Point imported from CMS. Each Operational Position has a service charge point history with its validity range. If there is no Operational Position appearing in the list, import the Service Charge Point into HPO or OPO_POINT.
Premiums	Defines the premium pay amount to deduct from the pool. The premium work code is linked to Time Attendance (T&A) module, Work Code. The “Add Premium Points to Main Pool for Points Ratio Calculation” is an option to include or exclude premium points when calculating the initial point value. Applicable mainly to calculate HSC pool.
Collector For Previous Voyage	For user to define which pool the roll-over from the previous voyage should go to in the next voyage.

5. At the **Other Settings** tab, select the “This pool will collect the difference between Total Service Charge Collected and Total Service Charge Distributed” from the previous voyage to enable the selection window and then select the applicable checkboxes.
   - **Service Charge Pool Collections:** Select a pool to collect the variance between the Collection side “Net for Distribution” and the Distribution side “Net Service Charge Distributed”. It is a collection versus distribution variance.
   - **Service Charge Distribution Pools:** Select a pool to collect the variance between ”For Distribution” and “Total Distributed”. It is a Distribution-side variance only.

Figure 25-4 Pool Distribution - Other Settings



Pool Calculation

The Pool calculation setup determines the distribution type, eligible crew operational position, and eligible department.

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1. At the Home tab, click the **Pool Calculation**.
2. At the Service Charge Pool Calculation ribbon bar, click **Add** to create a distribution type.
3. At the Parameter tab, enter the following details:

Figure 25-5 Service Charge Pool Calculation Parameters

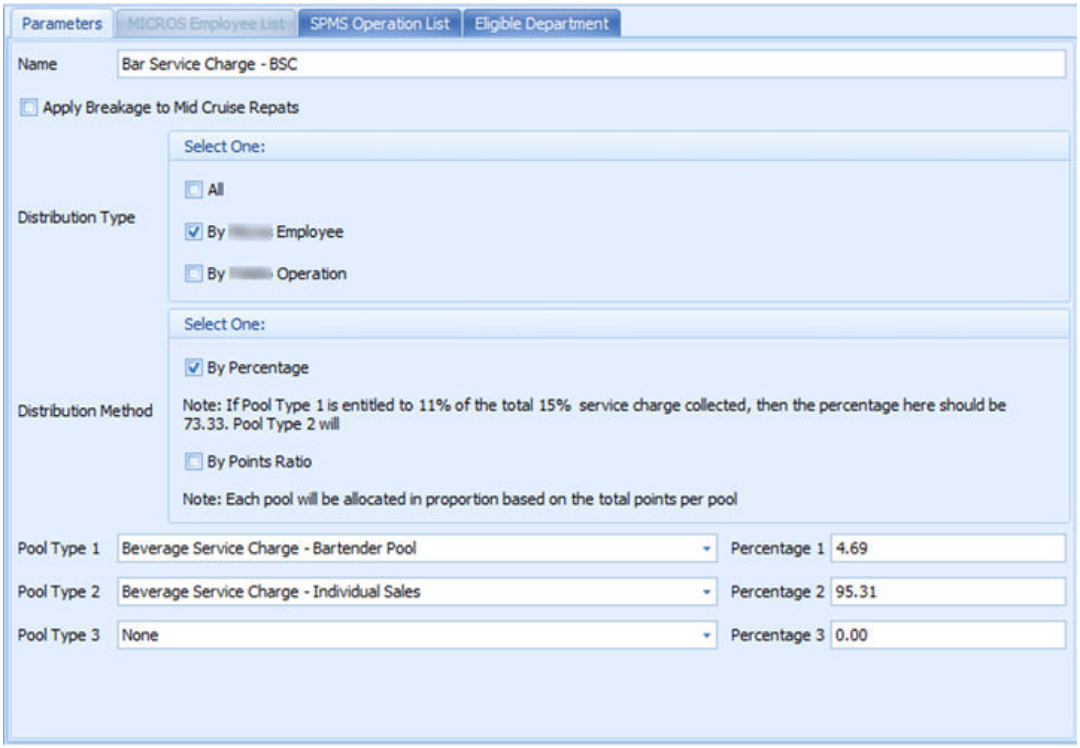


Table 25-2 Service Charge Parameters Tab Field Definition

Field Name	Description
Name	Name of Distribution Type. For example, Bartender, Gift Order.
Apply Breakage to Mid Cruise Report	Check if Breakages is applicable to the pool for mid cruise repatriations. For example, if this option is unchecked, the program will not use the “percentage of collected amount from department” set in Eligible Department to minus the 'Mid Cruise Breakage' (HSC posting x 97.25%) defined in parameter.
Distribution Type	Distribution Type - either by MICROS Employee, SPMS Operational Position or all. The program obtains the service charge posting either closed by MICROS employee or SPMS Operational crew or both. If **By MICROS Employee** is checked, the MICROS Employee tab is enabled for selection and the SPMS Operation List tab is disabled.

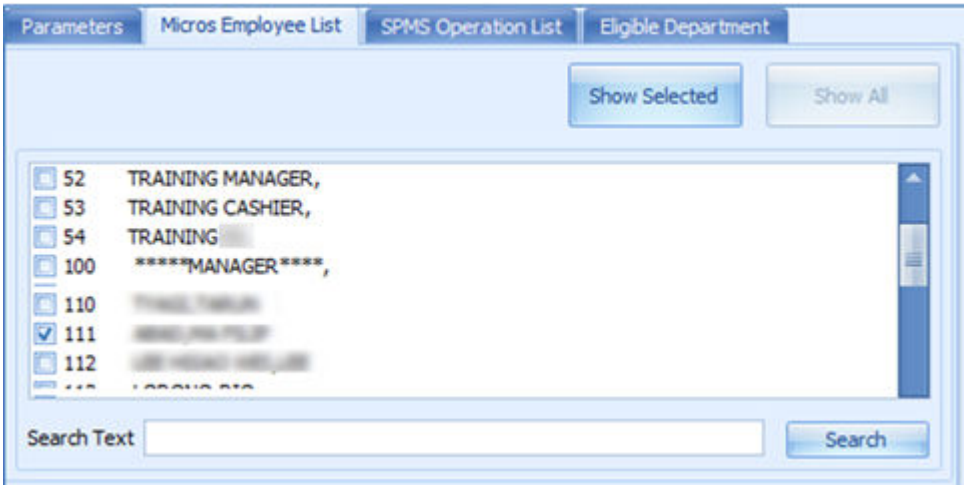
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Table 25-2 (Cont.) Service Charge Parameters Tab Field Definition

Field Name	Description
Distribution Method	Distribution Method - either By Percentage or By Point Ratio. • By Percentage - the amount collected from service charge posting is distributed to Pool Type by percentage specified. • By Point Ratio - the amount collected is allocated proportionately based on the total points per pool. (This is applicable to Hotel Service Charge).
Pool Type and Percentage	The program distributes the collection amount into the pool based on the percentage specified and applicable when selecting “Distribution Method - By Percentage”. For example, amount collected by Bartender type distributes 73.33% into Bartender Pool and 26.67% into Common Pool.

4. At the **Micros Employee List** tab, select the **MICROS** employee. The distribution type collects the service charge postings of the selected MICROS employee that closes the checks. This option is available to Distribution Type, By Micros Employee.

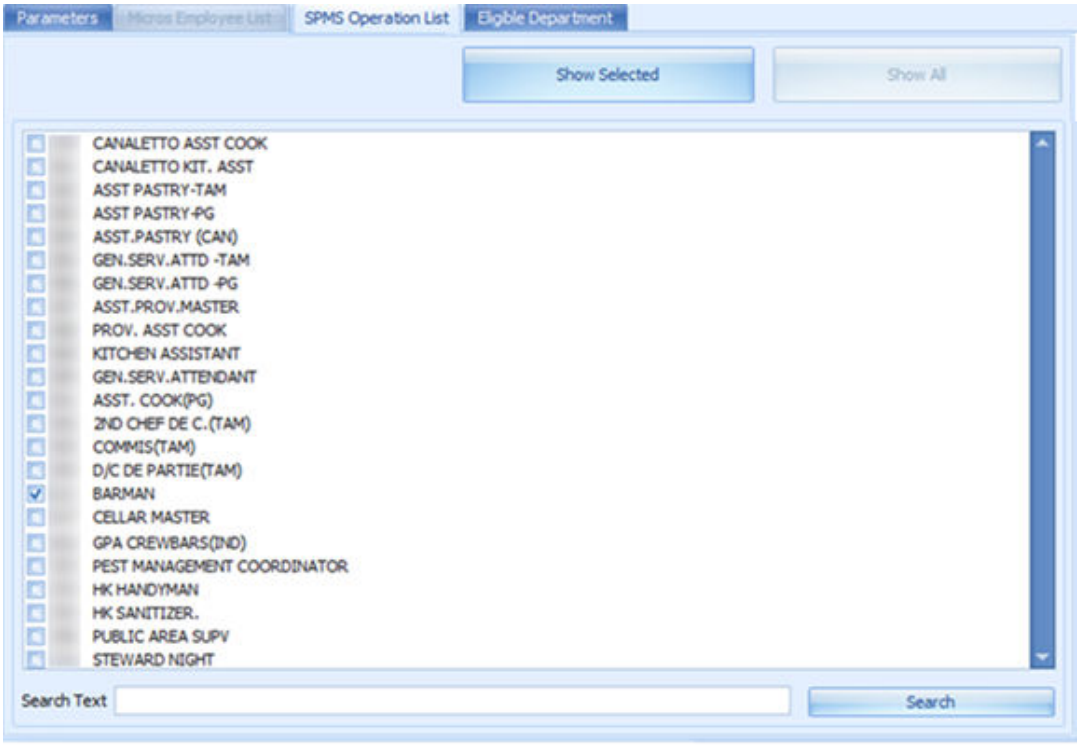
Figure 25-6 MICROS Employee List



5. At the **SPMS Operational List** tab, select the SPMS operational position. The distribution type collects the service charge postings where the selected SPMS operational crew closes the checks. This option is available to Distribution Type, By SPMS Operational.
6. At the **Eligible Department** tab, select the eligible department service charge and define the percentage amount. For example, the Bartender type gets 98 percent of the total service charge posting in Bar Service Charge department.

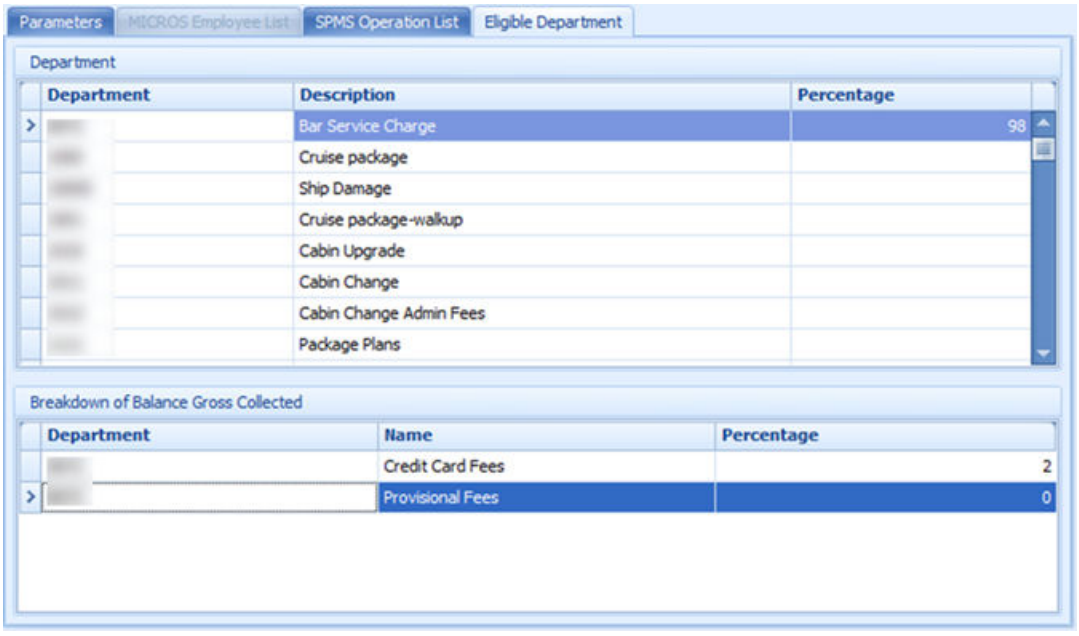
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Figure 25-7 SPMS Operational List



7. Information in the Breakdown of Balance Goes Collected section reports the Credit Card Fees and Provision Fees entered.

Figure 25-8 Eligible Department



8. The Pool Type Percentage field automatically calculates and fills the remaining column percentage to 100 percent when one of the percentages is specified.

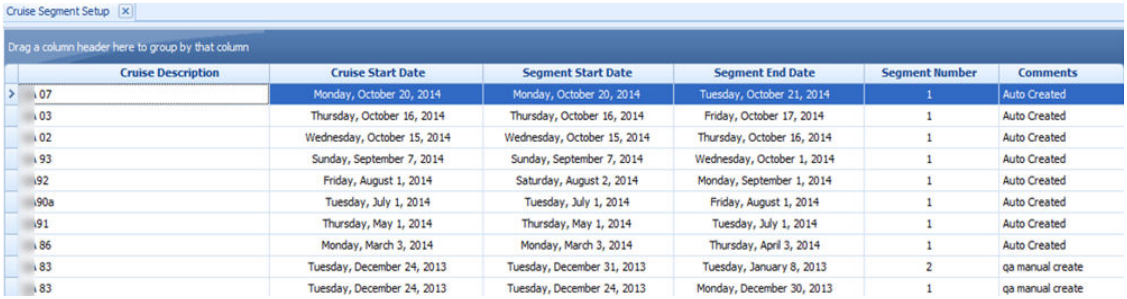
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Cruise Segment

This function allows the ship operator to calculate the distribution total by segment for a long voyage or a cruise. This is useful for world cruises where the calculation is broken down into multiple segments, and calculates the total distribution weekly.

The system automatically creates the cruise segments for all future cruises based on the system cruise setup when the program starts up, and on remarks in the **Comments** column.

Figure 25-9 Cruise Segment


Cruise Segment Setup

Drag a column header here to group by that column

Cruise Description	Cruise Start Date	Segment Start Date	Segment End Date	Segment Number	Comments
07	Monday, October 20, 2014	Monday, October 20, 2014	Tuesday, October 21, 2014	1	Auto Created
03	Thursday, October 16, 2014	Thursday, October 16, 2014	Friday, October 17, 2014	1	Auto Created
02	Wednesday, October 15, 2014	Wednesday, October 15, 2014	Thursday, October 16, 2014	1	Auto Created
93	Sunday, September 7, 2014	Sunday, September 7, 2014	Wednesday, October 1, 2014	1	Auto Created
92	Friday, August 1, 2014	Saturday, August 2, 2014	Monday, September 1, 2014	1	Auto Created
90a	Tuesday, July 1, 2014	Tuesday, July 1, 2014	Friday, August 1, 2014	1	Auto Created
91	Thursday, May 1, 2014	Thursday, May 1, 2014	Tuesday, July 1, 2014	1	Auto Created
86	Monday, March 3, 2014	Monday, March 3, 2014	Thursday, April 3, 2014	1	Auto Created
83	Tuesday, December 24, 2013	Tuesday, December 31, 2013	Tuesday, January 8, 2013	2	qa manual create
83	Tuesday, December 24, 2013	Tuesday, December 24, 2013	Monday, December 30, 2013	1	qa manual create

1. To create a Cruise Segment, click the **Cruise Segment Setup** button at the **Service Charge Dashboard**.
2. In **Cruise Segment** setup, click the **Add** button to create a new cruise segment.
3. At the **Select Cruise** drop-down list, select a cruise. The listing shows the current cruises and all future cruises only. Click the header to sort the display.
4. Do note that the cruise segment for current cruise is no longer available after running the service charge calculation on the current cruise.
5. Define the start date, end date of the segment, and select the **Segment** number from the drop-down list. You can add up to 10 segments. Note the following when adding a segment:
   - The earliest cruise is displayed first. The cruise end-date defaults to actual cruise end date.
   - When creating multiple segments, by default the displayed cruise start date is the previous segment end date, and end date is the actual cruise end date.

     The system performs the following validations when creating a segment:

     – Manually create segment for future cruise.

     – If cruise A start date < > current system date, the system prompts First Segment Start Date must start on the voyage start date.

     – Current system date is 25 June, cruise A start date is 24 June, cruise B start date is 01 July.

     – Creating the first segment on 03 July prompts the message “Start date need to same with voyage start date.”

     – Cruise A first segment starts from 01 June –5 June.

     – Creating the second segment on 06 June prompts the message “Segment start date must be the same as previous segment end date”.

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- If segment end date overlaps with next segment's start date of the same voyage, the program takes the service charge posting until the segment end date minus 1 day.
- If the segment end date overlaps with next voyage segment's start date, the end date is not minus by one day since the posting is in different voyage. For example: Cruise 1 - Segment 1 – 01 April to 03 April Cruise 1 - Segment 2 – 03 April to 08 April Cruise 2 – 08 April to 09 April.

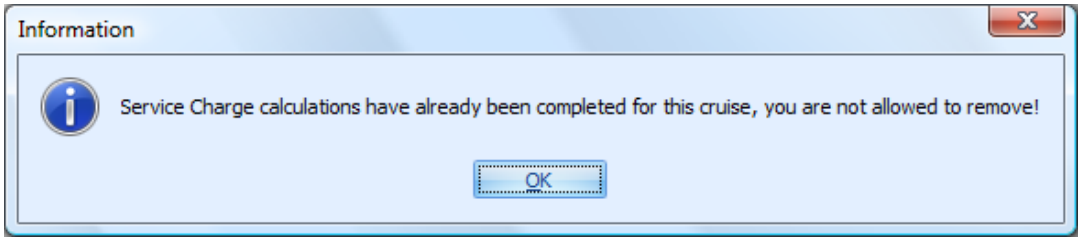
  To calculate cruise 1 - Segment 1: You will get the posting from date 01 April to 02 April.

  To calculate cruise 1 - Segment 2: You will get the posting from date 03 April to 08 April.

  To calculate cruise 2: You will get the posting from date 08 April where POS_CRUISE = <Cruise 2 ID>.

6. Enter your comments for the new segment and click the **Apply** button to save the record. The added cruise segments appear in the Cruise Segment List.
7. Repeat the above steps to create more segments for that cruise.
8. The **Select Cruise** drop-down list shows the cruise by segment. Select the cruise by segment for the service charge calculation.
9. The system disallow processing of Segment 2, without first processing Segment 1.
10. Once the service charge calculation of the cruise segment completes, it is not possible to delete them. The system prompts a warning message when an attempt is made.

Figure 25-10 Disallow Service Charge Removal Notification



Premium Point

A Premium Point is a calculation that calculates the premium work hour deductible in the Hotel Service Charge calculation. There are two types of premiums payable in the Hotel Service Charge; those that are scheduled and approved in the T&A module, and those manually booked in Service Charge module. The Premium Points approved in the T&A module has a default point-value per hour in **Payroll module**, **Interface Pay** codes. After the Manager approves the premiums points, then only those points appear in the **Service Charge Overview, Premium Points** section. This function is controlled by the **"Hotel Service Charge"** and **"Show Premium Points Calculation"** parameter.

1. Login to the Service Charge module and click **Premium Points**.

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Figure 25-11 Premium Points

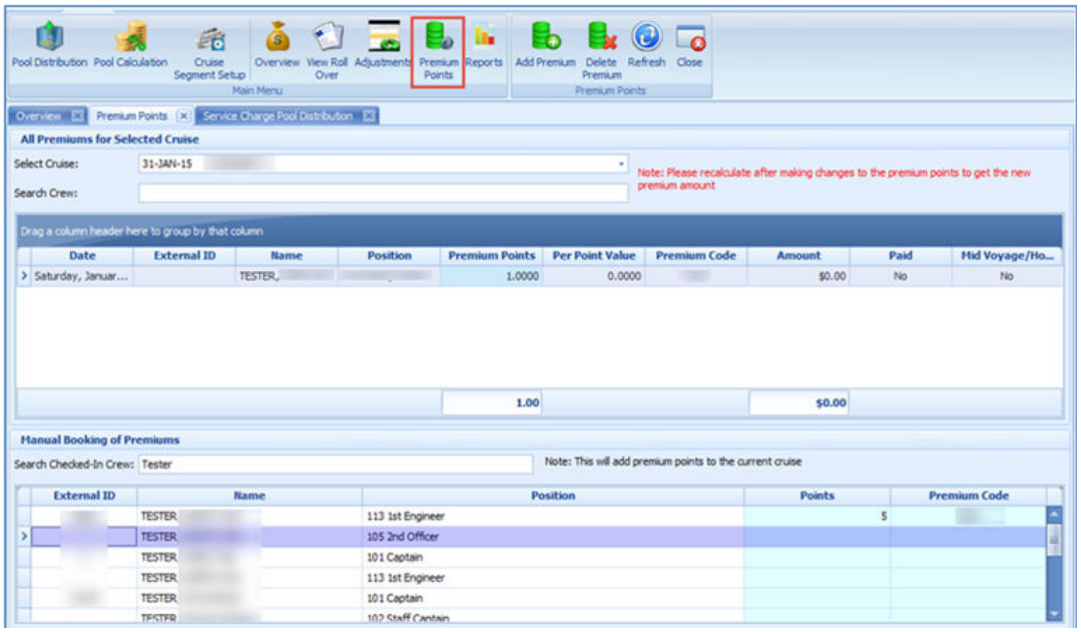


Table 25-3 Premium Points Field Definition

Field Name	Description
Date	Actual work date entitled to premium rate recorded in T&A module.
External ID	Crew ID.
Name	Crew name.
Position	Crew operational position.
Premium Point	Premium work hour (approved in T&A module) x the pay rate. The pay rate refers to the premium work hour in Payroll, Interface Paycode.
Per Point Value	Point value as of last Calculate Total. If Calculate Total has not been process after new premium points appears, then the point value and amount will be zero until the next voyage recalculation.
Amount	(Points x point value) based on latest Calculate Total.
Paid	Payment indicator. Indicates premium point is paid through Payroll for repatriating crew.
Mid Voyage/Home Port Repat	Indicates crew member is repatriating during or at end of voyage; Flag a “YES” when system date = crewmembers’ eligibility-end date.

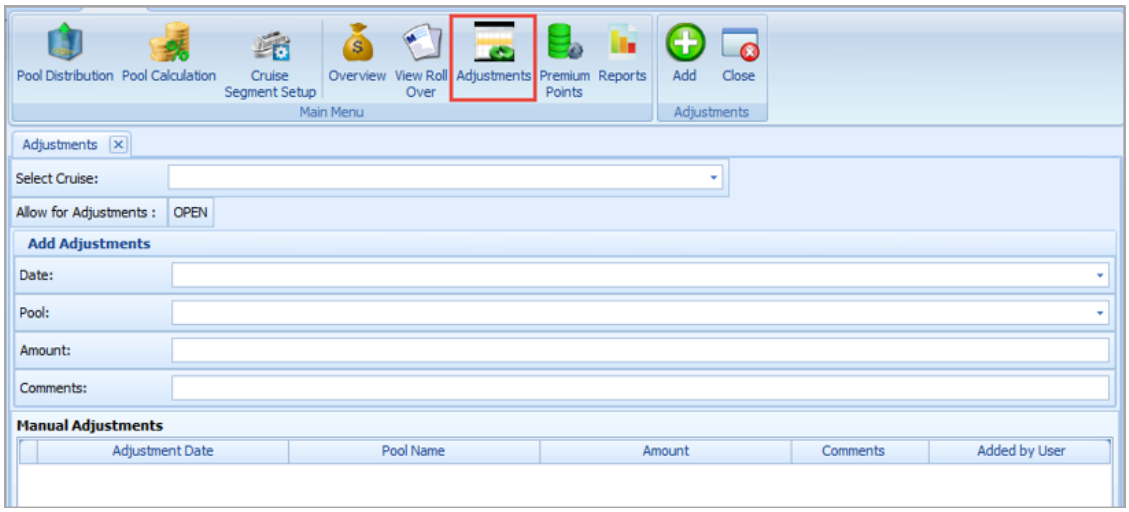
2. In the Premium Booking window, select the **Select Cruise** from the drop-down list. The default view is the current voyage and all premiums approved in the T&A module.
3. To locate the specific crew from the list, enter the Crew ID in the **Search Crew** field and press **Enter**.

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4. If no premium work hours is approved in T&A module or Pay Rate defined in the Payroll module, a Crew officer can manually book the premium through Manual Booking of Premium.
5. To perform Manual booking of HSC Premium point, go to the **Manual Booking of Premiums** section. Enter the Crew ID or a name in **Search Checked-In Crew** and press the **Tab** key.
6. Click the **Add Premium** button at the ribbon bar. Enter the point quantity and select the **Premium code** from the drop-down list. Premium codes displayed in the drop-down list are for manual entry and they are different from those approved in the T&A module.
7. When a message prompts “Are you sure you want to manually book these premium points for the selected crew?”, click **Yes** to proceed. The booking displays in the Premium Points window. After the next **Calculate Total** is processed, the premium pay amount appears.
8. Manual booking of premium point(s) are added into the current cruise.
9. Inclusion of the Premium Point into the main pool for initial point ratio calculation must be define in **Pool Distribution setup, Add Premium Point to Main Pool for Points Ratio Calculation**.
10. Adjustment to manually booked points is allowed using the above steps. Deleting a manually booked premium entry is possible as long as the cruise status is “Open”. Select the manual booked premiums and click **Delete Premium** at the ribbon bar.
11. Click **Yes** at the message prompt “Are you sure you want to delete this Premium record?” to confirm the exclusion.
12. Re-run the calculation process.

Manual Adjustment

This function adds or deducts an amount to or from specific Pool(s). Before you make any manual adjustments to each pool per voyage, make sure the **Allow for Adjustments** is OPEN.



1. Click the **Adjustment** button from the ribbon bar.
2. Select the cruise using the **Select Cruise** drop-down menu. The default view is the current voyage with the cruise status indicated at the side.

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3. In the **Add Adjustments** section, the date is defaulted to the first day of the current voyage. Use the drop-down menu to select the correct date from the date editor. Backdating an adjustment in the current (open) voyage is permissible since the Service Charge Pool calculations are based on daily values. The day's service charge value is influenced by the adjustment posting date.
4. Select the specific Beverage or Hotel Service Charge pool to adjust from the **Pool** drop-down list.
5. Enter the amount to adjust in the **Amount** field. The amount can be positive or negative.
6. Enter an explanatory comment in the **Comments** field if necessary.
7. Click the **Add** button at the ribbon bar and then recalculate the service charge.
8. Do note that after adding adjustments, it is not possible to delete them. However, you can post another adjustment of the same date to offset the posting.

   It is important to pay attention to the date of the adjustment booking as the calculation is based on the days point and the point value are calculated on a daily basis.

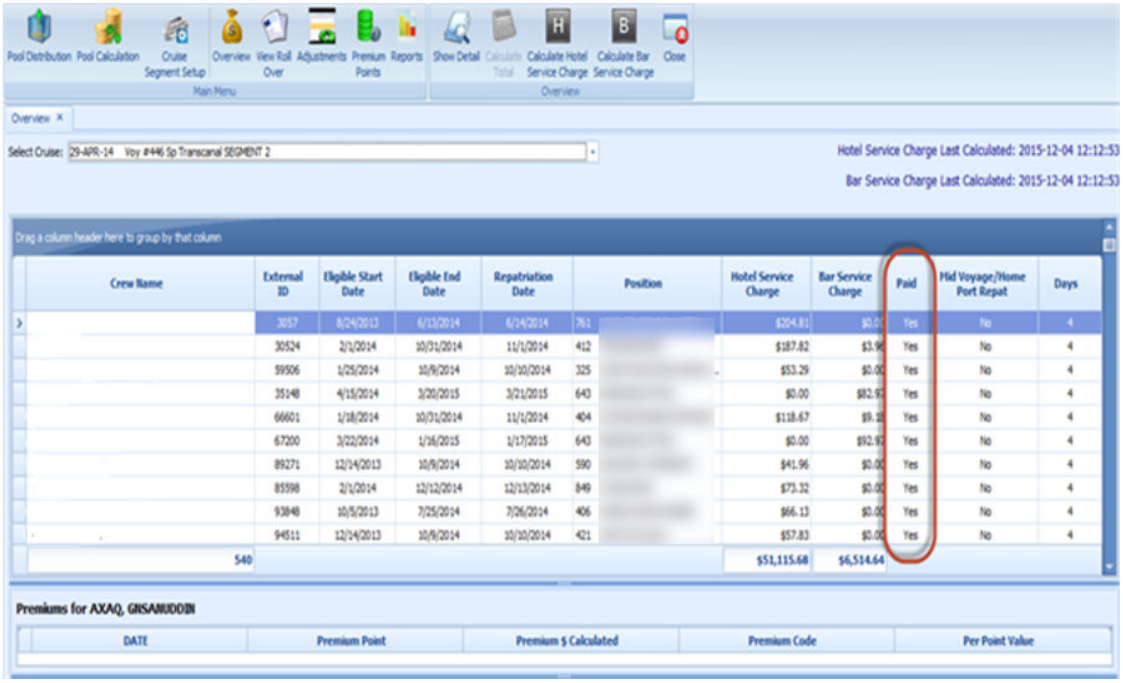
Leavers Paid Status

The Service Charge module is typically installed together with the Payroll module. For example, you can use an external Payroll system to pay the service charge, thus requiring a function to manually set the crew Paid Status in the Service Charge module.

Setting the value in the **General, Use Payroll to 0** parameter activates the **Paid/Not Paid** button in the Overview ribbon bar. After the Crew Officer confirms all leavers are paid and receipts are generated, the Purser then manually sets all BSC leavers status to *"Paid"* in the Service Charge module.

Selecting the crew record(s) and clicking the **Paid** button flag sets the **Paid** column status to **Yes**. Similarly, clicking the **Not Paid** button resets the flag to **No**.

Figure 25-12 Leavers Paid Status



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At the closure of the voyage/segment, click **Calculate Total**. The system automatically triggers all non-leavers **Paid** status as “Yes”. At the confirmation prompt, select **OK** to proceed.

At this time, all Beverage Service Charge (BSC) earned in the voyage by all non-repatriating Crew members status are automatically flagged as Paid and the window is locked for any modifications.

Calculation Processes

The Service Charge module calculates the total Hotel Service Charge (HSC) or Beverage Service Charge (BSC) of the day, then divides by the total pool points for the day before adding each day’s calculation to obtain the voyage total.

Figure 25-13 Service Charge Overview

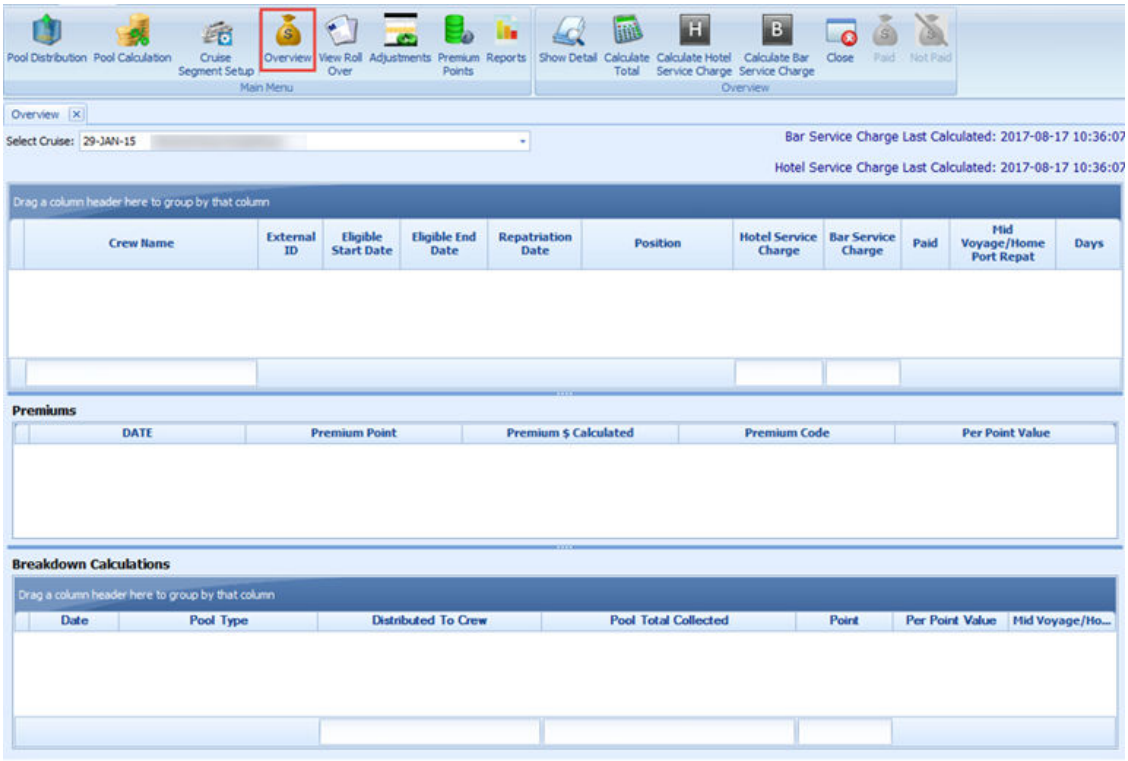


Table 25-4 Service Charge Dashboard Fields

Field Name	Description
Crew Name	Crew name.
External ID	Crew external ID.
Eligible Start Date	Date crew member reports for duty and eligible to service charge distribution.
Eligible End Date	Date crew member sign-offs from his/her duty and not entitled to service charge distribution thereafter.
Repatriation Date	Date crew member disembarks from the cruise.

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Table 25-4 (Cont.) Service Charge Dashboard Fields

Field Name	Description
Position	Crew member current Operational Position.
Hotel Service Charge	Amount accumulated from Hotel Service Charge pool and distributed to the crew member.
Bar Service Charge	Amount accumulated from all the Bar Service Charge pool and distributed to the crew member.
Paid	A Yes/No flag indicating whether the amount is paid to the crew member through Payroll system. When a crew has HBSC payout in Payroll system, the Paid column for the crew updates to Yes.
Mid Voyage/Home Port Repat	Denotes the whether the crew member entitlement to service charge is calculated based on a full voyage or partial. • No: Full voyage calculation • Yes: Partial voyage calculation Example 1: • Current cruise Segment 1: 14 July to 17 July • Current cruise Segment 2: 17 July to 22 July • Crew eligible end date is 17 July • Running a calculation on current cruise Segment 1 shows crew A mid cruise repatriation as NO • Running a calculation on current cruise Segment 2 shows crew A mid cruise repatriation as YES Example 2: • Current system date is 18 July • Crew eligible end date is 18 July • Running a calculation on cruise Segment 2 shows crew mid cruise repatriation as YES. The status only flag as NO when 18 July is the next voyage start date Example 3: • Current cruise Segment 2: 17 July to 22 July • Next voyage start date is 23 July instead of 22 July • Crew eligible end date is 22 July • Running a calculation on cruise Segment 2 shows crew mid cruise repatriation as YES

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Table 25-4 (Cont.) Service Charge Dashboard Fields

Field Name	Description
Days	Days calculated from cruise start date until crew service charge eligible end date (for mid cruise repat crew) or cruise end date. The program calculates the days until current system date if the cruise is the current cruise. For example: • Current system date: 17 July • Cruise period: 14 July until 17 July • Normal Crew • Crew eligible from 08 July 2011 until 08 July 2012 • Day(s) counted = 3 days (14 July until 16 July) • Repatriating Crew • Crew eligible from 11 July 2011 to 14 July 2011 • Day(s) counted = 1 days (14 July unto 14 July) • Crew joined middle of the voyage • Crew eligible from 15 July 2011 to 18 July 2011 • Day(s) counted = 2 days (15 July 2011 until 16 July 2011) If the system date, eligible start date and eligible end date are same, example: 17 July, program return day count = 3 days instead of 1 day
Premiums	
Date	Posting date of premium pay.
Premium Point	Premium work hour (approved in T&A module) x Pay rate. The pay rate refers to the premium work hour in Payroll, Interface Paycode.
Premium $ Calculated	Premium Pay amount.
Premium Code	Premium pay code.
Per Point Value	Point value as of last Calculate Total. If Calculate Total has yet been processed after new premium points appear, then the point value and amount will be zero until a recalculation is perform on the voyage.
Breakdown Calculations	
Pool Type	The type of service charge pool that the crew is entitled.
Distribute to Crew	The calculated distribution amount from the service charge pool type to be paid to the crew member.
Pool Total Collected	The total amount collected by the pool.
Point	Service charge point per position.
Per Point Value	Eligible point value.

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Table 25-4 (Cont.) Service Charge Dashboard Fields

Field Name	Description
Mid Cruise Repat	Yes / No indicator of crew member in mid cruise repatriation.

1. Click the **Overview** button to access the Service Charge Dashboard.
2. The Service Charge Dashboard window appears blank when you first open. Click **Show Details** to populate the information.
3. The window is divided into three (3) sections. The columns and width of these sections are adjustable by dragging the column divider.
4. If there are no HSC or BSC posting to the voyage at the time the **Calculate Total** button is first pressed, no crew members will appear in the list. The BSC list appears only when the BSC has been charged and not HSC or visa-versa.

Show Details

Table 25-5 Show Details Field Description

Field Name	Description
Pool Type	The type of service charge pool that the crew is entitled.
Distribute to Crew	The calculated distributed amount from the service charge pool type to be paid to the crew member.
Pool Total Collected	The total amount collected by the pool.
Point	Service charge point per position.
Per Point Value	Eligible point value.
Mid Cruise Repat	Yes / No indicator that the crew member is mid cruise repatriation.

1. At the Service Charge Dashboard, select the voyage/segment from the drop-down list.
2. Click **Show Details** at the ribbon bar.
3. In Service Charge Dashboard, the crew member lists are shown.
4. The premiums worked/booked, the total points, premium pay, type of premium, and point value of selected crew member are shown.
5. The detailed breakdown of daily HSC and/or BSC of selected crew member where the information shown are by per pool type (indicates the several pool types for BSC), and per day since the calculations are made on a per-day basis with its total distributed to the crew member for the voyage.
6. When highlighting a crew member, the **Breakdown by Calculation** shows the crew eligible type of pool and the respective pool distribution amount.

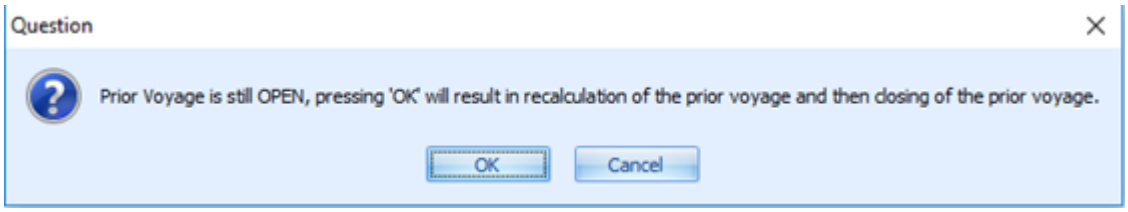
Calculate Totals

When the **Calculate Total** is clicked for the first time on a newly open voyage, the system automatically recalculates the previous open voyage for the final time, before closing the

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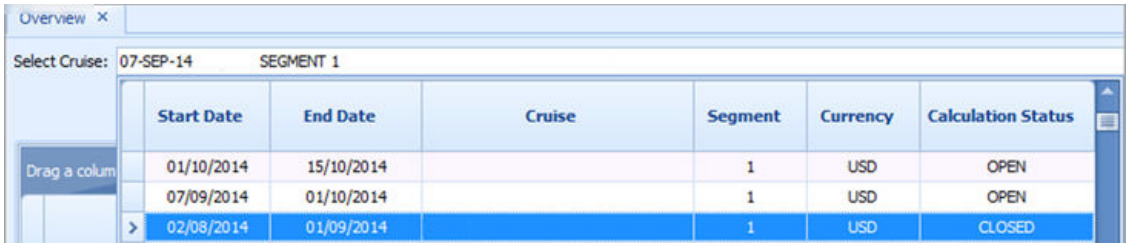
previous voyage and calculating the new voyage for the first time. After the previous voyage status is set to close, no further changes are allowed. Therefore, it is important to check and ensure the previous voyage that all the postings, premium points, and manual adjustments are complete.

Figure 25-14 Open Status of Prior Voyage



The date of the voyage status changes to **Close** becomes the **Last Calculated** date that appears in the **Select Cruise** drop-down list. Therefore, for reporting clarity it is best to maintain the last calculated date as the actual voyage or segment end date.

Figure 25-15 Segment Status



Run the **Calculate Total** function at any time and as often as required when the voyage is in the Open status. Clicking the **Calculate Total** triggers a recalculation of the daily HSC and BSC distribution for all crew members eligible for each day as long as they are not paid (see Mid-Voyage and Homeport Repats), and incorporates any additional posting, premiums, adjustments, new crew, repatriation status, and others.

The Calculate Total should be processed daily or regularly during the voyage to ensure all HSC and BSC are calculating and distributing, and correcting any arrears where necessary. Before the calculation begins, the program checks the Eligibility Start / End Date for discrepancies. At the end of the calculation, the dashboard displays all crew members with pool distribution.

Calculate Hotel Service Charge

The Calculate Hotel Service Charge function only calculates the HSC portion. The service charge calculations are processed based on the date posted on a daily basis. When the HSC posting is skipped, and is posted twice on another day, this affects the daily Per Point Value and premiums posted on those days, resulting to the followings:

- Premiums posted on a day with no HSC will have zero Per Point Value, and the crew members entitled to working premiums on that particular day will not have any premium pay.
- Premiums worked on a day with a double HSC posting would receive double-valued Per Point Value.

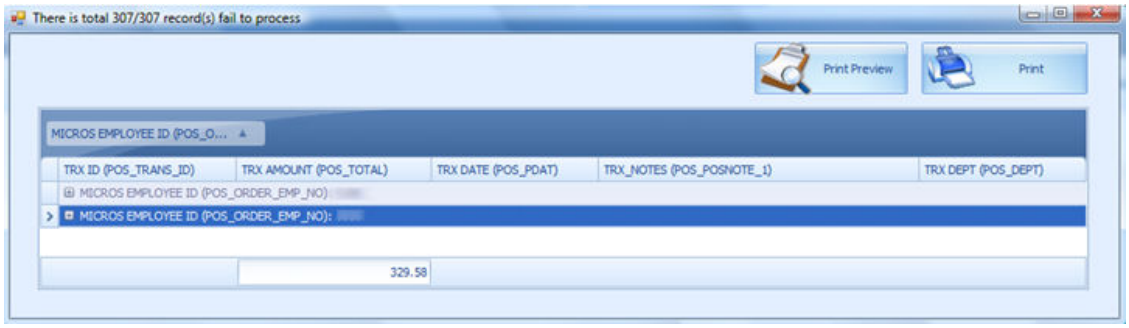
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Calculate Bar Service Charge (BSC)

Similar to HSC, this function only calculates the BSC. The BSC calculations could fail when any of the following occurs:

- MICROS charges posted with a MICROS employee number that is not assigned to any crew member.
- MICROS number is assigned to a crew member whose eligibility is not within the date range of the voyage being processed.
- The posting MICROS EMPLOYEE ID is not associated with any crew member ID in the database.

Figure 25-16 BSC Record Failed to Process



Click the **Print Preview** button to preview the Failed to Process record in the report layout or print to the printer directly.

Calculation Workflow

The Service Charge has multiple calculation methods for HBSC distribution to onboard crew members. The following are the processes:

- Get Service Charge Posting
- Distribute to Pool (mid cruise repatriation calculation)
- Distribute to Pool (full voyage calculation)
- Distribute to Eligible Crew in mid cruise repatriation
- Distribute to Eligible Crew in full voyage
- Roll Over Calculation

All calculation processes calculate each service charge pool daily. The program accumulates the daily distribution amount of the entire voyage and is shown in the Service Charge Dashboard.

Get Service Charge Posting

1. At the beginning of the calculation process, the program obtains the cruise date range of the selected voyage.

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2. It then obtains the dates between the voyage start date and the voyage end date. The system takes the SPMS system date as the end date if the cruise has not yet ended.
3. The daily posting is obtained based on conditions defined in the Pool Calculation and below validations:
    a. Check closed by eligible crew position or MICROS employee.
    b. Posting from eligible department.

The setup refers to Pool Calculation, Distribution Type by SPMS Operational Position, or MICROS Employee, and Eligible Department. For more information, see Pool Calculation.

Distribute to Pool

Distribute to Pool (with Mid Voyage Repatriation Calculation)

Before distributing the service charge posting to the respective HBSC pool, the program first checks whether the pool has any eligible crew repatriating in mid-cruise. This is ascertained by comparing the crew service charge eligible date with the posting date.

- The eligible crew in the respective pool refers to Pool Distribution setup, Distribute to selected Operational Positions.
- The program collects the posting amount based on the percentage defined in the Eligible Department in Pool Calculation setup. If the pool has mid cruise crew repatriating, the amount again deducts the percentage defined in the *Hotel Bar Svc Chg, Mid Cruise Breakage* parameter.
- Below is the formula to calculate the mid cruise repatriation when **Apply Breakage to Mid Cruise Repat** is checked in the Pool Calculation setup.

  Total HSC Posting x (100% - 2% - 0.75%) x (100 – 10%)2 = credit card fees; 0.75 = provision fees; 10 = Mid cruise breakage
- The pool calculation includes the:
  – Roll over amount
  – Manual Adjustment
- After the mid cruise repatriation calculation, the amount is distributed to the respective pool by the percentage specified. This setup refers to Pool Calculation, Distribution Type = By Percentage, Percentage of selected Pool Type.
- The crew member gets the distribution amount when the eligible date is within the voyage period.

Distribute to Pool (with End Cruise Calculation)

- The program collects the posting amount based on the percentage defined in Eligible Department (Pool Calculation setup, Eligible Department).
- The pool calculation includes:
  – Mid cruise repatriation point
  – Roll over amount
  – Manual Adjustment
- The crew member gets the distribution amount when the eligible date is within the voyage period.

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Get Total Point Day

- The Hotel and Bar Service Charge distribution is calculated using a points system. The program calculates the total point per day from selected Operational Positions in respective pool.
- The selected Operational Positions points refers to **Pool Distribution setup, Selected Operational Position**. The program takes the default point if override point is not define.

Distribute to Mid Cruise Repatriation Crew

- The respective pool amount is distributed to eligible crew accordingly.
- For mid cruise repatriation, the Per Point Value derives from the amount collected after deducting the percentage of mid cruise breakage (refer to calculation at Distribute to Poll (with mid cruise repatriation calculation) divided by the total point day.
- It then sums up the point value from various pool types calculations, such as Common Pool amount collected from Bartender type, Individual Sales type, Room Service type and Service Charges type.
- The Per Point Value is then used to multiply the individual crew point value to obtain the distribution amount.

Distribute to End Cruise

- If there is no crew disembarking during the cruise, the calculation process in the Service Charge module should only run once at the end of the cruise.
- Before calculating the normal cruise distribution, the program verifies if the pool has mid cruise crew repatriation. If Yes, the pool amount deducts the total mid cruise distribution amount to obtain the net amount for per point value calculation.

Service Charge Payout in Payroll

- For mid cruise repatriation crew member, the payout of service charge or premium pay is perform in the Payroll module.
- After a payout, any service charge adjustment will not affect the existing payout crew member.
- For non-mid cruise repatriation on a voyage that is closed, payout of service charge or premium pay is perform in the Payroll module. The Service Charge module do not allow a re-calculation of the collection. A message “Cannot calculate the total as amount for this voyage have already been payout through payroll” is prompted.

View Roll Over

The View Roll Over is an important tool in balancing the total HSC and BSC collected with the amount distributed. This window shows the detailed breakdown of all HSC and BSC collected and distributed by pool type, per voyage.

The Roll Over calculates the variance amount between the total amount collected and the total amount distributed. If the distributed amount does not tally with the total amount collected, it then brings forward the differences to the next voyage. This is to prevent an unaccountable loss in Accounting.

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Figure 25-17 Roll Over Amount Overview



Table 25-6 Header Description of Roll Over Amount Grid

Column Header	Description
Cruise	Selected Voyage.
Cruise End Date	Cruise end date / segment end date.
Status	Calculation status, either “Open” or “Closed”.
Cruise Segment	Indicate segment if voyage is segmented.
Pool Type	Distribution pools defined in Pool Distribution Setup.
Net Service Charge	Initial service charge distribution calculated based on last Calculate Total performed for crew members in each pool type.
Diff Collected vs Distributed Prior	The variance between the Collection Net for Distribution and the Distribution Net Service Charge Distributed. Displays the variance from previous voyage.
Rollover From Last	Amount per pool from previous voyage “Rollover From”.
Adjustment	Total of manual adjustments booked to each pool of the voyage.
For Distribution	Amount to distribute (Net service charge + Rollover + Adjustments).
Repat Distribution	Total of HSC/BSC per pool type calculated for repatriating crew.
Premium	Total of HSC premiums calculated for both repat & non repat crew during voyage.
Non Repat Distribution	Total of HSC/BSC per pool type calculated for non-repatriating crew.

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Table 25-6 (Cont.) Header Description of Roll Over Amount Grid

Column Header	Description
Distributed	Amount distributed based on (For Distribution – Repat Distributed – Premiums – Non Repat Distributed).
Rollover Next	Amount carry forward to next segment (For Distribution – Distributed will be carried forward to Rollover from Last).
Point	Total points for all non-repat crew in the pool type, for all days calculated (does not include repat crew or premium points).
Average Point	Average points derived from Per-pool Non Repat Distributed amount divided by non-repat Points.
Pool Collection Breakdown	
Pool Name	All collection/earning pools as defined in Pool Calculation setup.
Department	Distribution pool.
Gross	Total gross posting of the defined collection/ earning pools.
CC Fees	Credit card fee deduction from gross posting (% as defined in Parameter setup).
Provisional Fees	Contribution amount removed from gross posting toward 'lump sum' provisional (% as defined in Parameter set-up).
Net for Distribution	Amount to be distributed to crew (Gross – CC Fees – Provisional Fees).

1. From Service Charge dashboard, select the previous cruise from the **Select Cruise**.
2. Select the service charge calculation to run by clicking the option at the ribbon bar. The program then checks for any discrepancy in each total pool amount and displays the variance in Roll Over window.
3. Navigate to the Roll Over window by clicking the **View Roll Over** button at the ribbon bar.
4. The combined totals for HSC and BSC are shown by default.
5. Click the **Refresh** button to refresh the last service charge calculation.
6. Details of the expanded voyage(s) can be sorted or filtered by clicking the column header. Column width may be widen or compressed as required.
7. In the Pool Distribution Breakdown, the voyage/segment is listed when the voyage status **Open**.

In the Pool Calculation Breakdown, the voyage/segment is listed when HSC or BSC charges are posted.

Calculation Method Examples

The following sections describe the calculation and the distribution example of HSB/BSC.

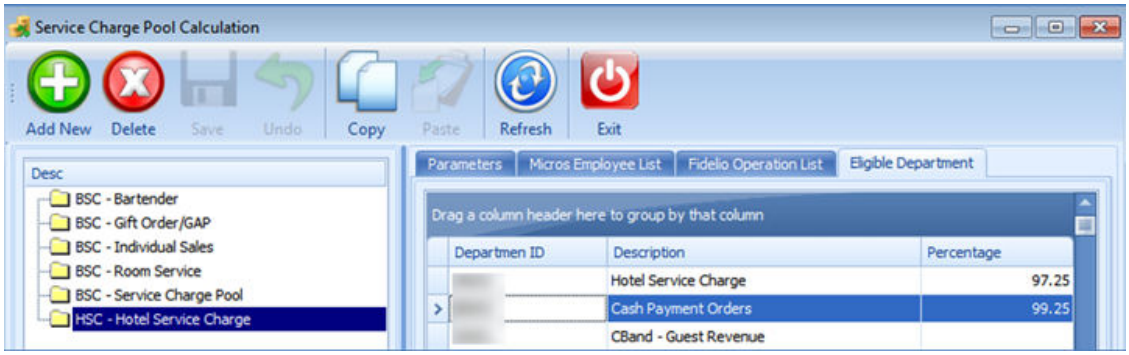
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Cash Payment Order Calculation

The Cash Payment Order (CPO) is an exempted service charge fee for credit card fees deduction on Hotel and Bar Service Charge.

1. At **Service Charge Pool Calculation**, create the new debit department for CPO posting.
2. Define the percentage to distribute in Pool Calculation, Eligible Department setup under the same Pool Distribution type.

Figure 25-18 Service Charge Pool Calculation



In the following example, the Cash Payment Order department = 99.25%. Amount collected only calculates the provision fees of 0.75%. The exempted credit card fees of 2% (100% - 0.25%).

Here are the scenario:

- Amount collected from Hotel Service Charge department = $20798.66 (posting $21386.8 x 97.25%).
- Amount collected from CPO department = $526.03 (posting $530 x 99.25%).
- Total Amount collected for pool distribution = $21324.69.

Distribution by Point Ratio

The Distribution by Point Ratio method is applicable to Hotel Service Charge. The amount collected is allocated proportionately based on the total points per pool.

In the following example, the Hotel Service Charge is broken down into three different Pool:

- Dining Room Pool
- Cabin Steward Room Pool
- Common Pool

1. At the Pool Distribution setup, set up the **Dining Pool** and select the **Operational Position**. For example:
    - Dining Room Pool Operational Position number is 412, 414, 419, 413
    - Cabin Steward Pool Operational Position number is 711, 706
    - Common Pool – All position except the position in the Dining Room Pool and Cabin Steward Pool

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2. In Pool Calculation setup, select the **Distribution Method "By Point Ratio"** and select the corresponding distribution pool in **Pool Type 1/2/3**. Get the pool amount from eligible department.
    - Total Posting on cruise day 01/01/2011 = $22297.
    - Amount collected on Hotel Service Charge department 97.25% = $21683.8325

Get total point of each pool.

- Total Points in Dining Room Pool = 35465.6.
- Total Points in Cabin Steward Pool = 235.9.
- Total Points in Common Pool = 49410.1.
- Total Points = 85111.6.

Get the per point value and distribute to the pool.

[Total HSC amount collected / Total points of 3 pool] x Total Point in Pool.

- For Dining Room Pool Distribution: $21683.8325 / 85111.6 x 35465.6 = 9035.55.
- For Cabin Steward Pool Distribution: $21683.8325 / 85111.6 x 235.9 = 60.10.
- For Common Pool Distribution: $21683.8325 / 85111.6 x 49410.1 = 12588.1822.

Distribute to crew with point ratio calculation.

[Total Points Distributed / Total Point in Pool] x Point of individual crew.

- For crew in Dining Room: 9035.55 / 35465.6 x 453.7 = $115.59.
- For crew in Cabin Steward Pool: 60.10 / 235.9 x 73.4 = $18.7.
- For crew in Common Pool: 12588.1822 / 49410.1 x 245.5 = $62.55.

User Security

Below is the User Security Access rights for HBSC functionality:

Table 25-7 User Security Rights

Security Reference No#	Description
3074	Pool Distribution.
3075	Pool Calculation.
3076	Recalculate Pool.
3094	Cruise Segment Setup.
3095	Show Service Charge Distribution.
3279	Edit Hotel Bar Service Charge Points.
4339	Pool Calculation \ Modify Details.
4340	Pool Distribution \ Modify Details.
4341	View Rollover.
4342	View Adjustment.
4343	View Adjustments \ Add Adjustments.
4344	View Premium Points.
4345	View Premium Points \ Modify Premium Points.

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Parameters

This section describes the Parameters available to Service Charge module.

Table 25-8 PAR_Group Hotel Bar Svc Chg

PAR Name	Value	Description
BSC Special Positions	<Operational Position>	Specify the positions that needs to be included for daily minimum guarantee deduction. Value is linked to OPO_ID.
BSC Special Positions - Pool 1 to Deduct From	<Integer>	Specify the first Pool ID and Percentage to deduct daily guaranteed for Beverage Management. For example: Value is 89.00. This means 89% for the Special Positions is deducted from the Service Charge Pool.
BSC Special Positions - Pool 2 to Deduct From	<Integer>	Specify the second Pool ID and Percentage to deduct daily guaranteed for Beverage Management. For example: Value is 11.00. This means 11% for the Special Positions is deducted from the Service Charge Pool
Mid Cruise Breakage	2.0	Mid Cruise Breakage in percentage, for example 2.0.
Pool to Deduct Premiums	<Pool Name>	Name of the Service Charge Pool to deduct the premiums. This is normally use for Hotel Service Charge Pool.
Service Charge Eligible End Date	-1	Number of days with reference to crew repatriation date. 0 - if the service charge entitlement is up to and includes the repatriation date; -1 - if entitlement is until the day before the repatriation date. For example: Update crew expected debarkation date = 11/11/2011 • If parameter value = 0, Eligible End Date = 11/11/2011 • If parameter value = -1, Eligible End Date = 10/11/2011 • If parameter value = 2, Eligible End Date = 13/11/2011

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Table 25-9 PAR_Group Promo

PAR Name	Value	Description
MICROS Server Name		MICROS Database Service Name
MICROS Server Type	0	0 - Oracle, 1 - Microsoft SQL Server
MICROS User Name		MICROS User Name

Table 25-10 PAR_Group General

PAR Name	Value	Description
Use Payroll	0, 1	0 - Service Charge module not dependent on Payroll module. This parameter enables the Paid/Not Paid button in Service Charge module. 1 - Service Charge module is dependent on Payroll module.

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26
Payroll

The Payroll module automates payroll processing to ensure compliance with legal and tax requirements while simplifying employee payments. It calculates wages based on hours worked or salaries, taking into account the vacation and holiday time for each pay period. Additionally, the system handles tax information to help you meet your tax obligations and can generate a variety of reports for both hourly and salaried employees.

Setting up Payroll Codes

A Payroll company is used to separate a range of shipboard payrolls that have different processing cycles or payroll currencies. Before you begin using the payroll module, you must set up a Default System Code, Payroll Company, Salary Group, Salary Position, Calculation Method, Contract Template, Scheduled Contract Changes, Tax Type, and Payroll Setup Copier.

Pay Code Maintenance

The Pay Codes have four (4) categories:

- **Pay Additions:** This pay code is used to calculate the Gross Pay for an individual.
- **Pay Deductions:** This pay code is used to deduct taxes, allocations, penalties, garnishments, and/or other onboard or shore side obligations. Pay Deductions are the sum of the (Pay Additions)minus (Pay Deductions) which equals the Net Pay of an individual.
- **Payout** This pay code is used in the final payments of the net pay to an individual. A normal payout would include cash, ship's bank, and a financial institution or accrued to the next period.
- **Benefits Contribution** This pay code is used to pay benefit contributions such as Social Security or Medicaid or any other employer contribution information added to the contract that has to be accounted for onboard. (used for pension plan or medical plan).

Below are the sub-groups within the major pay groups maintained in SPMS. They are named as the Code Type.

- Basic Wage
- Sick Pay
- Travel Expenses
- Vacation Pay
- Allotment
- Miscellaneous
- Travel Deductions
- Tax
- Payout

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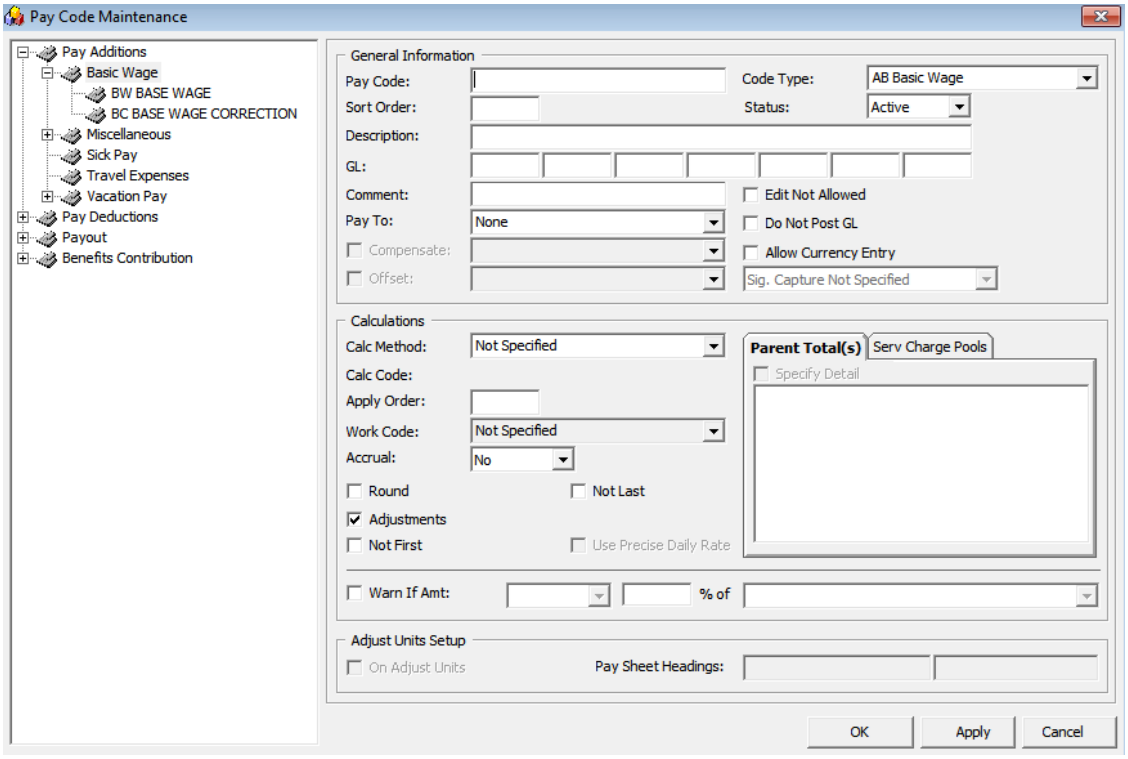
Creating a Code Type

1. Log in to the Payroll module.
2. Navigate to the **Maintenance** menu and select **Pay Codes** from the context menu.
3. On the Pay Code Maintenance window, right-click and select **Add Pay Code Type**.
4. Enter a short code and description in the **Description** field.

> **Note**
>
> The first character of the Code Type determines the type of pay calculation to use. A Pay Additions Code Type MUST begin with an A, Deductions with a D, Pay Outs with a P and Benefit Contribution with a B. Otherwise the system will not calculate the pay correctly.

5. Enter additional information in the **Comment** field, if any.
6. Check the **Enabled** checkbox to enable/disable the display of pay code types in other setup forms such as crew assignment, contract template and others.
7. To delete a selected pay code, right-click and select **Delete Pay Code Type**.

Figure 26-1 Pay Code Maintenance



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Table 26-1 Pay Code Maintenance Field Definition

Field	Description
Pay Code	A unique identifier for the pay code. Usually a number, but can be alphanumeric.
Code Type	The type and group of this pay code.
Sort Order	User definable sort order. If no additional sort is required, enter a zero (0) in this field.
Status	The current status of the pay code (Active or Inactive).
Description	The name of the pay code.
GL	The general ledger account number of the pay code.
Comment	Any additional information for this pay code.
Pay To	Determines if the pay code requires information on where to send the deduction or payment. • None: No Pay To is required. • Specify: Pay To information will be requested at contract time for this pay code.
Compensate	Works with code type, Benefit Contribution – BCC & BUP to populate pay deduction as the deduction of payroll for crew contributions to pension plan or medical plan.
Offset	Work with code type, Benefit Contribution to populate the benefit contribution pay code as the benefit posting to the balance automatically when payroll is paid out at the end of the pay period.
Edit Not Allowed	An option that disables the user from being able to modify the pay amount of the pay code while editing the contract or assignment.
Do Not Post GL	The option to not write the pay code into the GL file when generating a GL file.
Allow Currency Entry	A function to allow entry of currency conversion when adding posting or payroll adjustments. **Note:** Applicable to Quick Posting, New Pay Item, Cash Advance, and Payout.
Signature Capture	A signature capture is required during payout. Only applicable when selecting Payout.
Calc Method	This code determines the calculation method used to calculate the amount of the pay code.
Calc Code	Works with Calculation Method ‘A-SPEC’,’D-SPEC’ or ‘P-SPEC’. It represents a special calculation method that was added to the program to handle a calculation outside the normal methods.

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Table 26-1 (Cont.) Pay Code Maintenance Field Definition

Field	Description
Apply Order	The posting order of the pay codes when calculating the pay. The order is within the Additions, Deductions and Pay Out pay groups. **Note:** If a pay code is to be based on a previously calculated amount, then that amount must have a lower apply order of the pay code set up so that its value will be available for the calculation.
Work Code	Works with the Time Attendance calculation method A-TAOT, A-TAHO, A-TANO, A-PPPH.
Accrual	Amount accrued for the next month. • Yes: Amount calculated for this pay code is accrued to the next period at pay out until the end of the crew's contract is reached. • No: Amount not accrued to next month. • Background: The amount calculated for this pay code is accrued to the next period but is hidden on the pay sheet. It shows the total accrued amount on the pay sheet only and is paid out when the person's contract is reached. **Note:** Only Pay Additions and Pay Outs can be accrued.
Parent Total	For certain Calculation Methods (Percent of another amount for example), you can specify the percentage to include on previously calculated pay codes For example: The new Pay Code "10% Percent Bonus" is a percentage of the person's Basic Wage and Leave Pay. **Note:** The apply order field for the new pay code must be greater than the apply order field for any of the amount to be used in the calculation. When this button is selected, a list box appears, allowing you to pick the pay codes.
Service Charges Pool	Works with the Service Charge calculation method A-HBSC to populate the service charge pool type.
Use Precise Daily Rate	Uses a more precise formula to calculate monthly pay. Example: 10% of Monthly Wage $2100 Used with Precise Daily Rate: 10% x (2100 *12/365) * 29 (contract day) = $200.22 Without Use Precise Daily Rate: 10% x (2100/30) * 29 (contract day) = $203 **Note:** This option is enabled when the pay code is selected at Specify Detail. It is used more on the A-PERC calculation method.

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Table 26-1 (Cont.) Pay Code Maintenance Field Definition

Field	Description
Round	Round the final amount calculated for this pay code to the nearest denomination unit of currency.
Adjustments	Option to allow the pay code for manual adjustments. **Note:** Applicable to Add New Pay Item, Quick Posting, and Cash Advanced.
Not First	Do not use this pay code for the first pay period of the contract.
Not Last	Do not use this pay code for the last pay period of the contract.
Warn if Amt	This restricts the amount entered on one (1) pay code based on the amounts entered for another pay code. For example: If an allocation must be at least 80% of a crew member's base pay, you would check the **Warn If** checkbox, select "is less than" from the drop-down list, enter 80 in the percent text field and select "Base Pay".
Adjust Unit Setup	Determines whether this pay code appears on a person's pay sheet so that unit information can be entered. **Pay Sheet Headings:** The descriptions to display at the top of the Pay Sheets for Multiple People form. **Note:** Apply to calculation methods assigned to 'PPER, HOUR, PDAY, SPEC, PDTD, PDTI, PPMW, PPTE, PWEK, PYER, VACP, TAHO, TANO and TAOT'.

Adding a Pay Code to Code Type

1. On the **Maintenance, Pay Code Maintenance** window, expand the tree view and right-click the **Code Type** you wish to add to the pay code.
2. Select **Add Pay Code** and complete the pay code setup form.
3. Click **Apply** to save or click **OK** to save and exit the form.
4. To edit, select the Pay code, edit and then click **Apply** to save the changes.

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> **Warning**
>
> Please use extreme caution when updating pay codes since many of the codes are dependent on other codes.
>
> - Changing the **Apply Order** or the calculation method of the code may have an adverse impact on another code.
> - Changing the **Calculation Method** of an existing pay code from “Flat Rate” to “Percent of Another Amount” will not affect the pay code that is already added to an assignment.

Deleting a Pay Code

To delete a pay code, right-click the code and select **Remove**. You can only delete an unused pay code.

Salary Group

A Salary Group is similar to SPMS Operational Department. This is used to group people by their salary range and responsibility.

Creating Salary Group

1. On the Payroll **Maintenance**, select **Salary Group** from the context menu.
2. On the Salary Group window, right-click on the group listed and select **Add New**.
3. Enter the short code and description for the group in the **Description** field.
4. Enter an additional comment in the **Comment** field, if any.
5. In the **Mapped ID** field, enter the **GL ID** code. This code is one of the fields used for GL Output file.
6. The **Enable** field is checked by default. Uncheck to disable the display in other setup forms such as crew assignment, contract template and others.
7. Click **Apply** to save or **OK** to save and close the form.
8. To delete a Salary Group, right-click on the code and select **Remove**. You can only delete a code that is unused.

Salary Position

Salary Position groups people by its job responsibilities within a Salary Group. These groups of people typically have a similar, if not identical contract.

A set of salary positions is maintained for the entire Payroll system and is used by all companies set up in the system.

Creating Salary Position

1. Select the Salary Position from the Payroll Maintenance menu option.
2. A list of Salary Groups is shown in the Salary Position Maintenance window. Click the plus (+) key to expand the view of existing Salary Positions.
3. Right-click the Salary Group and select **Add New** to create a new position.

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4. Enter all the require information and click **Apply** to save. Refer to the following table for field descriptions.

Figure 26-2 Salary Position

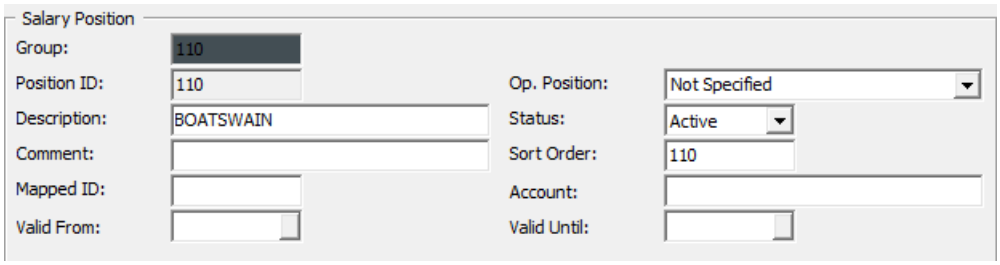


Table 26-2 Salary Position Field Definition

Field	Description
Group ID	Field represents the Group ID of the Salary Group. This is generated automatically based on the selected Salary Group.
Position ID	Unique ID for Salary Position.
Description	Position name.
Comment	Additional comments.
Mapped ID	GL mapping field used in the GL Output field.
Valid From/Until	Validity Period for the position. If the field is blank, this means the position does not have a Validity date. The program checks the valid date against the current system date. An expired or invalid position is not shown when creating a crew contract/assignment.
Op. Position	Links the Salary Position to Operational Department. Once the position is linked, the crew member that belongs to the operational position is populated on the crew assignment screen.
Status	Active/Inactive. If the status is set to Inactive, the salary position is not displayed when creating a crew contract.
Sort Order	Sort Position by the order entered. Used as an alternative sort. If alternative sort order is not required, you may enter any number in this field.
Account	Department name used for the GL output field.

Calculation Method Overview

The Calculation Method defines the computation of a particular pay code during pay generation. Although the Calculation Method maintenance form exists, you are not allowed to perform insertion and deletion actions, due to the values in this table as it would require code changes. However, you are allowed to set the status to enable or disable.

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Below are the pay calculation methods currently available in the system for general use.

Table 26-3 Calculation Method Overview

Pay code Type	Code	Description	Calculate based on
Not Specified	-	Not Specified	The Pay code will not populate when: • Editing an Assignment • Making a Payroll Adjustment • Setting up Contract Template • Performing Quick Posting • Importing Postings
Pay Addition Calculation	A-CEND	Contract End	A flat amount added to the last pay period of a contract.
	A-CSTR	Contract Start	A flat amount added on the first pay period of a contract.
	A-FLAT	Flat Amount	A flat amount added to each pay period.
	A-HMTH	Half Month	A flat amount added when the person worked for at least 15 days during a period. Half the amount will be added for 1 to 14 days.
	A-HOUR	Per Hour	Rate multiplied by pay sheet entered units to arrive at amount.(Rate x Units)
	A-PDAY	Per Day	Rate multiplied by pay sheet entered Units to arrive at amount. (Rate x Units)
	A-PDAC	Per Day Automatic Calculation	Amount entered as a flat amount on the contract, but computation is based on days in period during pay calculations. (Rate / Number of Day of the pay period)

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Table 26-3 (Cont.) Calculation Method Overview

Pay code Type	Code	Description	Calculate based on
Pay Addition Calculation	A-PERC	Percent of another Amount	Percentage taken from previously calculated amount. If detail pay codes are not specified, the percent is taken from the currently calculated gross pay. (Rate (%) x Base (Specified pay code))
	A-PPER	Per Pay Period	Amount is entered as a flat amount on the contract, but computation is based on days worked and days in period during pay calculations. (Rate / Number of Days in the pay period)
	A-SPEC	Half Month	A special pay calculation must be written. The code for this calculation must be entered in the Calc Code field. Calc Code: STHMTH = Get full pay if worked more than 16 days. NCHMTH = Get full pay if worked more than 15 days.
	A-PWEK	Per Week	Weekly calculation amount of the pay period. (Rate / 7)
	A-PYER	Per Year	Yearly calculation amount of the pay period.(Rate / 365 or 366)
	A-SPCO	SPA Commission Earning	Pay code to post total amount of crew commission from SPA module (refer to table SPR) into crew member assignment. (Sum of SPR_COMMISSION)
Pay Addition Calculation	A-OFFS	Negative Percentage Offset of Another Amount	Negative amount use to offset a specified pay code. (Rate(%) x base (specified pay code))

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Table 26-3 (Cont.) Calculation Method Overview

Pay code Type	Code	Description	Calculate based on
Pay Deduction Calculation	D-CEND	Contract End	Flat amount deducted on the last pay period of a contract
	D-CSTR	Contract Start	Flat amount deducted on the first pay period of a contract.
	D-FLAT	Flat Amount	Flat amount deducted at each pay period.
	D-PERC	Percent of Gross (or another amount)	Percentage of Gross Pay (or another amount) deducted on each pay period. (Rate (%) x Base (Specified pay code))
	D-PPER	Per Pay Period	Amount deducted on each pay period depending on the number of days worked in the pay period. (Rate / Number of Day of the Month)
	D-PRMD	Percent of Remainder	A percent of current net pay is deducted each pay period. (Rate (%) x Base (specified pay code))
Pay Deduction Calculation	D-SPEC	Special	A special pay calculation must be written. The code for this calculation must be entered in the Calc Code field. Calc Code: STHMTH = Deduct full pay if worked more than 16 days. NCHMTH = Deduct full pay if worked more than 15 days.
	D-OFFS	Negative Percentage Offset of Another Amount	Negative amount used to offset the specified pay code. Rate(%) x base (specified pay code)
	D-TAX	Tax Rates Per Tax Table	Amount paid out based on tax type defined in TAX table.
	D-UNTL	Flat Amount With Maximum	Same functionality as D-FLAT.

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Table 26-3 (Cont.) Calculation Method Overview

Pay code Type	Code	Description	Calculate based on
	D-HMTH	Half Month	Flat amount deducted if the person worked at least 15 days during a period. Half the amount will be deducted for 1 to 14 days.
Payout Calculation	P-FLAT	Flat Amount	Flat Amount paid out each pay period.
	P-PERC	Percent of Gross	Percent of Gross paid out each pay period.
	P-PPER	Per Pay Period	Amount paid out based on the number of days worked in the pay period.
Payout Calculation	P-PRMD	Percent of Remainder	Amount paid out based on the percentage of whatever has yet to be paid out.
	P-OFFS	Negative Percentage Offset of another Amount	Percentage to balance the specified pay code.
	P-SPEC	Special	A special pay calculation must be written. The code for this calculation must be entered in the Calc Code field.
	P-NBCP	Negative Balance Closing	Negative amount to be paid out.
Benefit Contribution Calculation	B-FLAT	Flat Amount	Flat amount deducted for benefit contribution.
	B-OFFS	Negative Percent Offset of Another Amount	Percentage to balance the specified benefit contribution pay. (Rate(%) x base (specified pay code))
	B-PERC	Percent of Another Amount	Percentage taken from specified pay code amount. (Rate(%) x base (specified pay code))
	B-TIER	Tiered percent of Another Amount	Percentage taken from two (2) sub-entries for pension plan contribution calculation.

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Table 26-3 (Cont.) Calculation Method Overview

Pay code Type	Code	Description	Calculate based on
Pay	A-BACL	Being Addition to Crew's Longevity	Rate = Vacation Pay Entitlement OR No. of Day.
Additions	A-HBSC	Hotel & Bar Service Charge	Sum of HBT_POOLTOTAL
	A-HEGA	HBSC In Excess of Guaranteed Amount	Used to compare service charge amounts and minimum guaranteed amount. (Amount = A-HBSC – A-MUMG (Daily))
	A-HOLP	Holiday Pay	Holiday Pay based on the number of holiday X defined rate and base wages on current pay period. System is auto calculated at the daily rate. (Rate x Base (specified pay code) x 12/365 x number of days in HOL)
	A-MUMG	Make Up for Minimum Guarantee	A calculation method that allows the user to specify the amount guaranteed they will get if the pay code does not reach the amount during the payout process at the end of the month • Daily Min: Rate x Number of Cruise Day • Monthly Min: (Rate / 30) x Number of Day • Yearly Min: (Rate / 365) x Number of Day
	A-PDTD	Per Diem Travel Domestic	Domestic Travel pay amount for each pay period. The rate is defined in Contract Level set up (Base Wage x 12/365 x pay unit x Domestic Rate (if defined in contract level)).

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Table 26-3 (Cont.) Calculation Method Overview

Pay code Type	Code	Description	Calculate based on
	A-PDTI	Per Diem Travel International	International Travel pay amount for each pay period. The rate is defined in Contract Level set up. (Base Wage x 12/365 x pay unit x International Rate (if defined in contract level))
	A-PPMW	Per Previous Contract Monthly Wage	Total monthly pay from previous contract. (Units x Base (Specified pay code))
	A-PPPH	Premium Points Per HSC	Time Attendance pay code = A-PPPH and work code matches the set up in Time Attendance module.
	A-PPTE	Per Previous Contract Total Earning	Percentage of total contract pay from previous contract. (Rate (%) x Base (Specified pay code))
	A-SLBE	Seniority Loyalty Bonus Entitlement	Amount to be paid based on number of days specified in Seniority Loyalty Bonus set up and Bonus Longevity Setup in Contract Level.
	A-TAHO	Per Time & Attendance Holiday Hour	Holiday Overtime linked to Time Attendance Roster Daily, Work Code. (Rate x Number of Day of HOL records) **Note:** Crew's Daily Roster in Time Attendance must be in APPROVED status.

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Table 26-3 (Cont.) Calculation Method Overview

Pay code Type	Code	Description	Calculate based on
	A-TANO	Per Time & Attendance Normal Hour	Overtime linked to Time Attendance Roster Daily, Work Code. Additional pay for each pay period. (Rate x Number of Hours of Work Code) **Note:** Crew's Daily Roster in OHC. Time Attendance must be in APPROVED status. The daily roster date (TADR_DATE) must be within the pay period.
	A-TAOT	Per Time & Attendance Over-Time Hour	Overtime linked to Time Attendance Roster Daily, Work Code. The total Overtime hours will be deducted by Weekly Work Hour multiplied by the Rate. (Rate x (Number of hours per day – (Weekly Work Hour / 7)) **Note:** Crew's Daily Roster in Time Attendance must be in the APPROVED status and flagged to “Included Work Hours”
	A-VACP	Vacation Pay Entitlement	Vacation pay amount with Early Repatriation entitlement. The system auto calculates the daily rate. (Rate x Base (specified pay code) x 12/365 x Vacation Pay Entitlement Days x Number of Day of current pay period) / Number of Day of Contract Length)
	A-VPCT	Vacation Pay Percentage	Specify Details = Base Wage or (+) Daily Minimum Guarantee.

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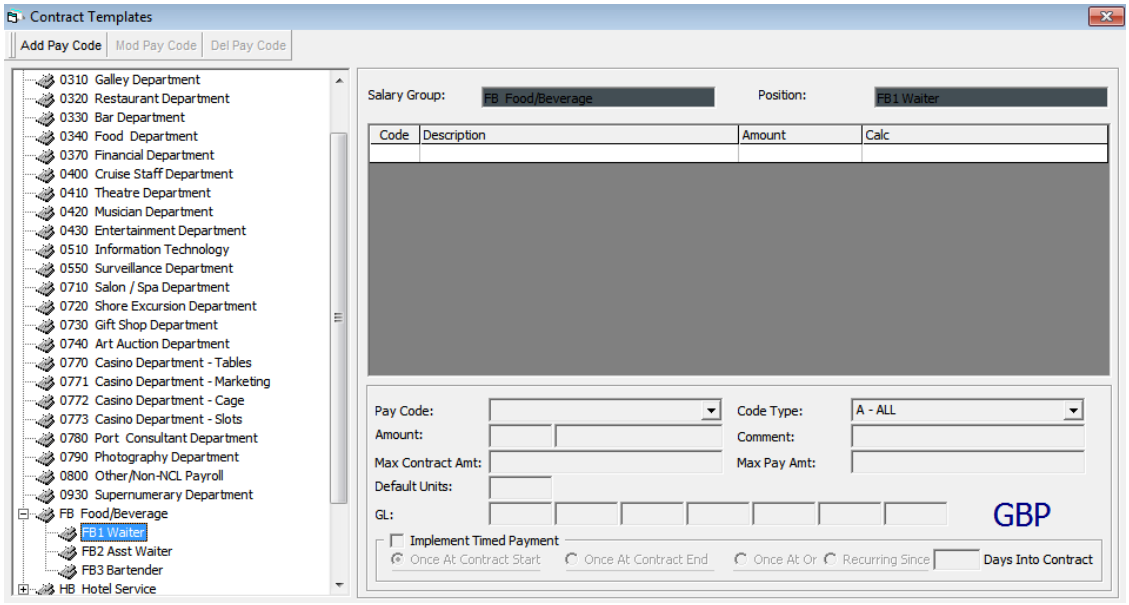
Table 26-3 (Cont.) Calculation Method Overview

Pay code Type	Code	Description	Calculate based on
Deductions	D-PDTD	Per Diem Travel Domestic	Domestic travel pay amount deducted from each pay period. The rate is defined in contract Level setup. (Domestic Rate x Units)
	D-PDTI	Per Diem Travel International	International travel pay amount deducted from each pay period. The rate is defined in Contract Level setup. (International Rate x Units)

Contract Template

The Contract Template allows you to define a basic contract template for each Salary Position, by person or company specific. This can be used as initial contract pay codes when adding a contract.

Figure 26-3 Contract Templates Form



Adding Pay code to Contract Template

1. Select a Position on the Contract Template form.
2. Click **Add Pay Code**.
3. Navigate to the Template Pay code Maintenance form and fill in the details accordingly.

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4. Click **Insert** to save.

Figure 26-4 Template Pay code Maintenance

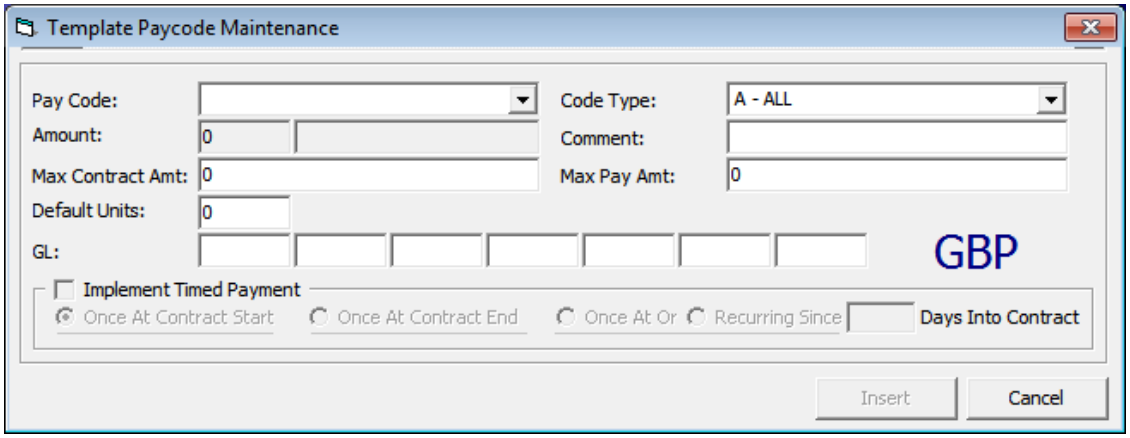


Table 26-4 Template Pay code Maintenance Field Definition

Field	Description
Pay Code	Pay code Selection
Code Type	Filter for the pay code by Code Type.
Amount / Rate	Amount of pay code. **Note:** Shows 'Flat Amount' when calculation method defined is amount calculation. Shows 'Rate / Percentage' when calculation method defined is percentage calculation.
Comment	Pay code comments in template.
Max Contract Amount	This field holds the total amount (in payroll currency units) that this pay code can accumulate to for the entire length of the contract. Once this amount is reached, no additional amounts are computed for this pay code.
GL	The shore side general ledger account which this pay code will be accounted for. **Note:** Will be auto populated if GL codes have been defined in Pay code setup.

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Table 26-4 (Cont.) Template Pay code Maintenance Field Definition

Field	Description
Implement Time Payment	Pay code used for payable upon return. There are four (4) categories: • **Once At Contract Start:** Pay code only applies one time upon contract start. • **Once At Contract End:** Pay code only applies one time upon contract end. • **Once At:** Pay code only applies after X days specified in Contract. • **Recurring Since:** Pay code amount recurs on the next pay period since X days specified in Contract. **Note:** This option only applies to Pay Additions and Pay Deductions.

Creating Contract Template

1. Go to the **Maintenance, Contract Templates** menu. A list of all salary groups is displayed.
2. Expand the group by clicking the plus **(+)** key.
3. Click **Add Pay Code**.
4. On the Add Pay code form, enter the pay amount and necessary details.
5. Click **Insert** to insert a pay code into the template.
6. To modify a pay code of a template, select the pay code and click **Mod Pay Code**.
7. Update the details and then click **Update** to save the changes.
8. To remove a pay code from the template, select the pay code and click **Delete Pay Code**.
9. On the confirmation prompt, click **OK** to proceed.

Schedule Contract Changes

Schedule Contract Changes is a scheduler that changes the pay code rates and amount for the following pay period, and can only set up a schedule for future pay periods. For instance, you would set up a schedule in March for a change to take effect in April. The changed pay rate is applied when a new pay period is activated and maintained by the company.

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Figure 26-5 Schedule Contract Changes

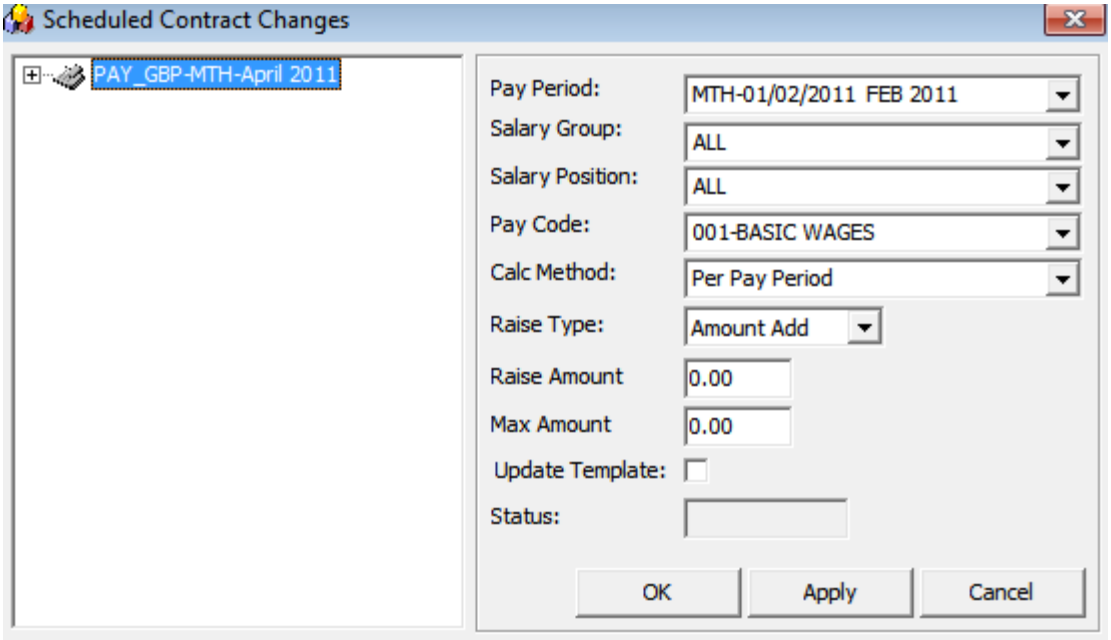


Table 26-5 Schedule Contract Changes Field Definition

Field	Description
Pay Period	Effective Pay Period for the raise.
Salary Group	Department to which the raise applies.
Salary Position	Position entitled to the raise.
Pay Code	Pay code for which the raise applies.
Raise Type	Defines the type of raise. • **Amount Add:** Add the raise amount to the current rate/amount for that pay code. • **Percent Add:** Adjust the rate or amount by percent • **From – To:** Change the pay only for specified old amount to the specified new amount • **Change To:** Change the rates or amounts to the raise amount.
Raise Amount	Value of raise
Max Amount	Maximum raise amount
Update Template	If the **Update Template** field is selected, the contract template updates with the raise upon opening the specified month. For example: Selected when the raise applies to the existing contract template(s) for the selected salary group, position and pay code.
Status	Status of schedule changes. Show *'Closed'* when changes are being processed.

1. On the Maintenance menu, select **Schedule Contract Changes**.

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2. On the Schedule Contract Changes form, right-click and select **Add**.
3. Complete the setup form and click **Apply** to keep the form or click **OK** to save and close the form.
4. To remove the schedule, right-click the selected schedule and click **Remove**. You are not allowed to remove a processed schedule.

Tax Types

The Tax Type set up defines the different tax deductions for different pay periods. A *No Tax* definition is needed if the company does not process the tax deductions for its employees or if all its employees are independent contractors.

The tax type can only be set up when the tax pay code exists, and this is done at the **Pay code Maintenance, Tax under Pay Deductions menu option**. You must select the Calculation Method "**D-TAX – Tax rates per TAX table**" and specify the applicable tax pay code.

Figure 26-6 Tax Types

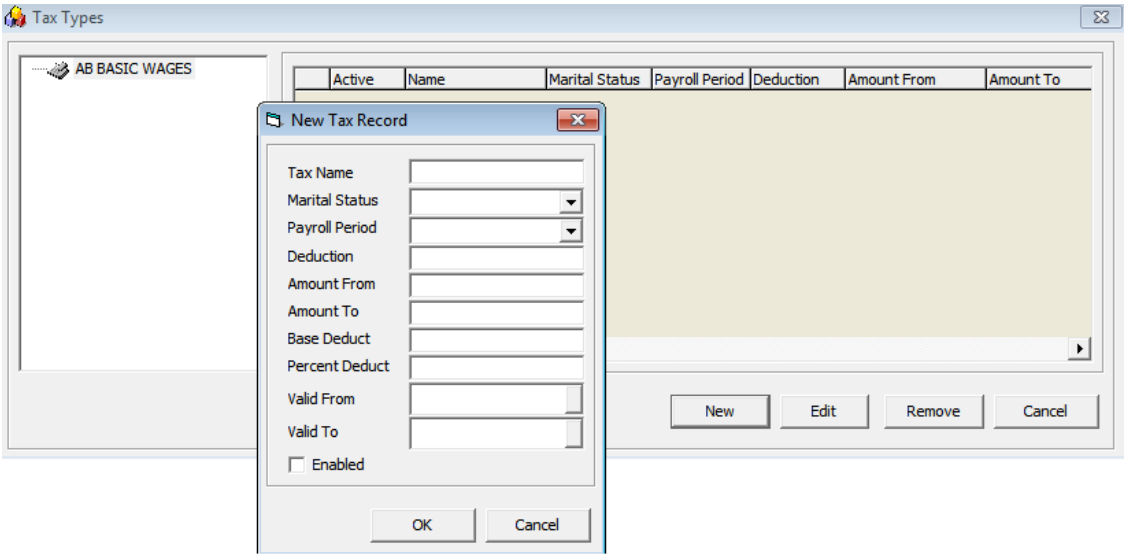


Table 26-6 Tax Types Field Definition

Field	Description
Tax Name	Tax name and description.
Marital Status	Marital status of the crew. The tax amount updates according to the tax calculation formula.
Payroll Period	Calculation method of the tax in the particular pay period.
Deduction	Amount of deduction.
Amount From	The starting salary range that taxes start processing from.
Amount To	The ending salary range that taxes stop processing to.

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Table 26-6 (Cont.) Tax Types Field Definition

Field	Description
Base Deduct	Minimum deduction (for flat rates).
Percent Deduct	Percentage of tax to deduct.
Valid From	Date the tax needs to be applied from.
Valid To	Date the tax needs to be applied to.
Enabled	Enabled or disabled for tax deductions.

1. On the Pay code Maintenance menu, select **Tax Pay** code.
2. Assign the calculation method to **D-TAX** and specify a pay code as a taxable amount.
3. Navigate to **Maintenance menu, Tax Types**. The tax pay code is available on the form.
4. Select the **Tax Pay code** and then click **New**.
5. Enter the tax type details and click **Apply** to save.
6. You can associate multiple tax record to a pay code.

The section below describes the formula used when the program calculates the tax.

The taxable amount will deduct the withholding amount, where the withholding amount equates to number of dependents, multiplied by TAX_DEDUCTIONS of the corresponding TAX_PAYROLL_PERIOD, TAX_MARITAL STATUS, TAX_VALID_FROM and TAX_VALID_TO. Both the TAX_VALID_FROM and TAX_VALID_TO are compared against ASYS.SYS_DATE.

The results are then compared against the same tax table to see if there is a record that the result falls between in the TAX_AMOUNT_FROM and TAX_AMOUNT_TO for the corresponding TAX_TYPE, TAX_PAYROLL_PERIOD, TAX_MARITAL_STATUS, TAX_VALID_FROM and TAX_VALID_TO.

If yes, then the tax amount is the percentage (of percent value TAX__PERCENT) of the difference between the taxable amount and TAX_AMOUNT_FROM. Then adding TAX_BASE to that amount gives you the final tax amount. If no, the final tax amount equates to zero.

Below is an example illustrating the tax deduction process.

1. In Tax Type setup:
   - Marital Status = Marital Status in crew assignment setup
   - Payroll Period = Payroll Companies Pay Cycle
   - Valid From = Between system date
2. In crew assignment, define the **Marital Status** and **No. of Dependents**. Add the taxable amount (Base Wage pay code) into **Pay Addition** and the Tax pay code into **Pay Deduction**. Enter the Base Wage amount $2500 and No. of Dependents equals to 2
3. Based on above Tax Type setup, the tax calculation formula are:
   - No. of Dependents x Deductions $170 (2 x 85 = 170)
   - Taxable amount after subtracting the dependents is $2330 (2500 – 170 = 2330)
   - Compare if the result is within the Amount From and Amount To
   - If yes, the amount in subtracted Amount From is $2280 (2330 – 50 = 2280)
   - Use that amount and multiply the Percent Deducted = 2280 x 12% = 273.6

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- The final tax amount is $283.6 (Result + Base Deduct amount) = 273.6 + 10 = $283.6

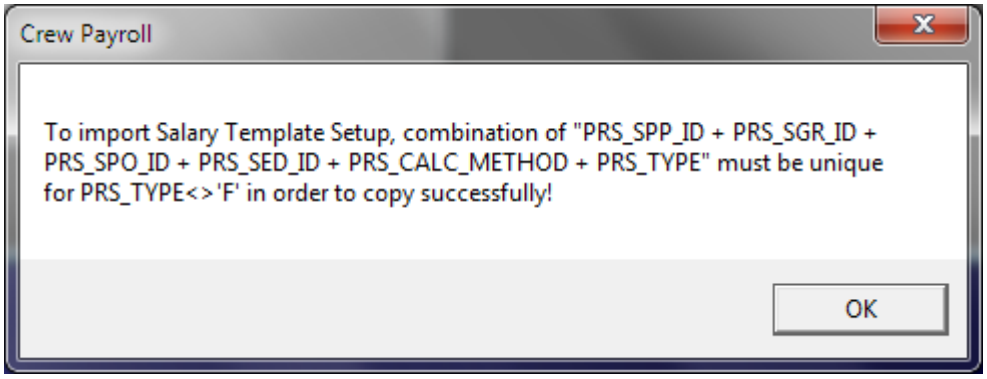
Payroll Setup Copier

- The Payroll Setup Copier is a tool that copies the entire payroll setup from one database to another, excluding these set ups:
- Cost Center
- Daily Currency Setup Detail
- Operation Position (SPO_AID_ID will be null)

While importing the data into the destination database, the Payroll Setup Copier checks the following:

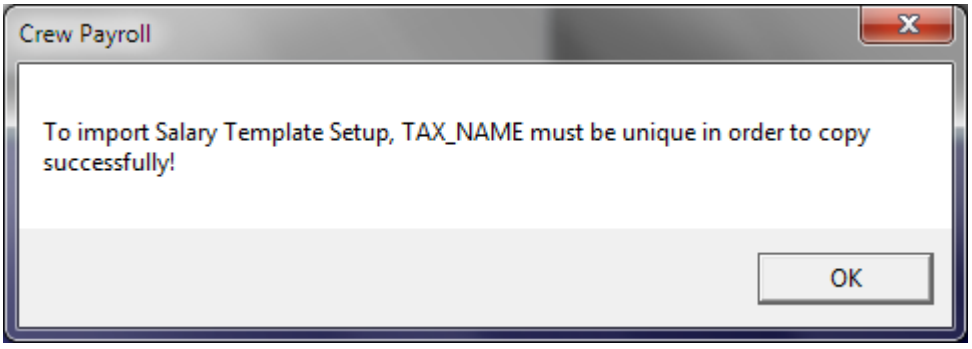
- Unique record in Pay Raise table, or else the following message appears.

Figure 26-7 Payroll Setup Copier Unique Record Prompt



- Tax name must be unique, or else the following message appears.

Figure 26-8 Payroll Setup Copier Unique Tax Name Prompt

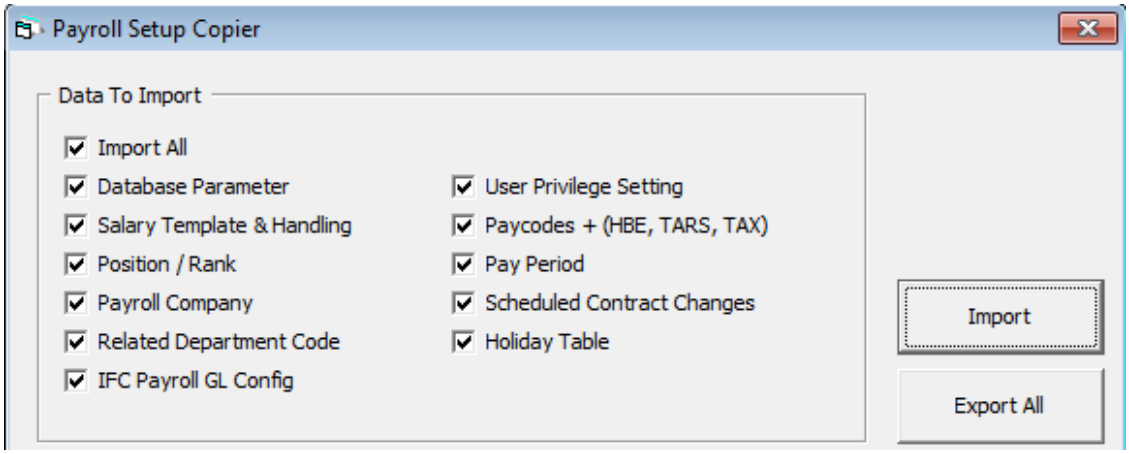


- When importing from a selected Payroll Company, all related loyalty bonuses and the vacation pay matrix are copied over, as well as inserting new records but will not delete the existing setup.
- When importing a **Salary Template & Handling** and both the source ship and target ship have a loyalty bonus and vacation pay matrix set up, the existing setup of the target ship is deleted before the import continues.

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- If the target ship has a parent total linking or an operation position is unlinked on a source ship that has linking, the Import re-inserts the link.

Figure 26-9 Payroll Setup Copier Options



1. On the Maintenance menu, select **Payroll Setup Copier**.
2. The application disregards all checked items for the export function. Click **Export All** when ready.
3. On the Browse for Folder window, select the location to save the file, and then click **OK**.
4. When the export completes successfully, the system automatically saves the Extensible Markup Language (XML) file (PYRL_SETUP_v[version_number]) at the selected location and displays a confirmation box. Click **OK** to close the prompt.
5. To import the data, login to the Payroll module of the destination database.
6. On the Maintenance menu, select **Payroll Setup Copier**.
7. On the Payroll Setup Copier window, select the respective checkboxes for the data to be imported and click **Import**.
8. Select the file to import from the saved location.
9. Once the import process starts, a progress bar is shown.
10. At the end of the process, the system displays a confirmation prompt. Click **OK** to close the prompt.

Pay Period Setup

The Pay Period is the defined time frame for every pay cycles. You are required to activate it to begin payroll transactions and closes it when the pay period is complete.

The pay periods are maintained by the Pay Company within the crew payroll system. The same period dates may have different statuses in different companies.

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Setting up Pay Period

Figure 26-10 Pay Period Maintenance

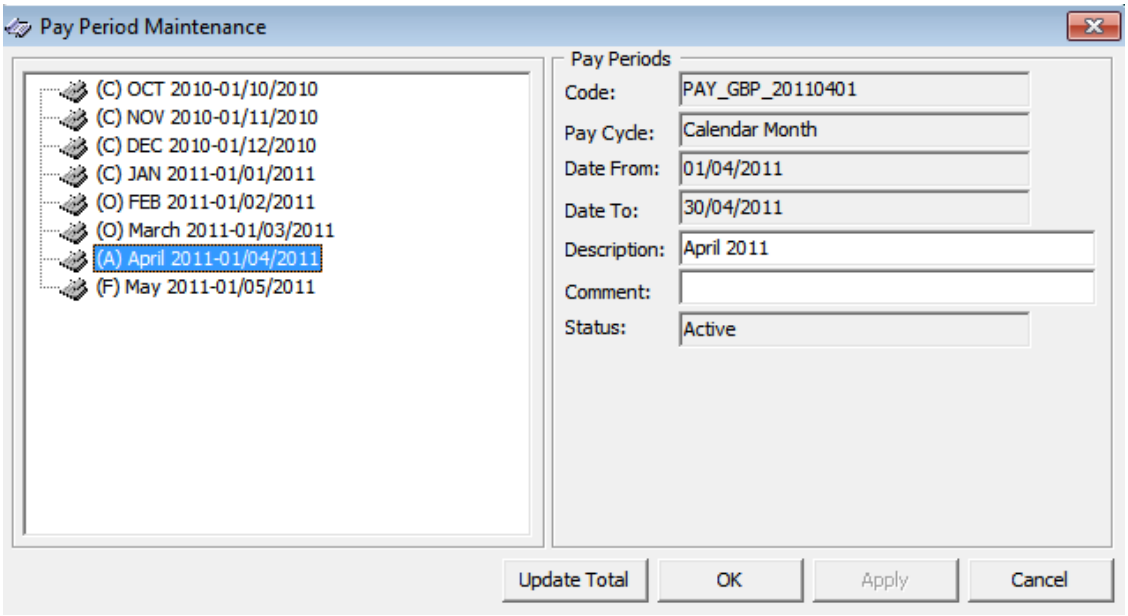


Table 26-7 Pay Period Field Definition

Field	Description
Code	Unique Pay Period code auto generated by the system.
Pay Cycle	Auto default to setting in **Payroll Company**, **Pay Cycle**.
Date From	Pay Period begin date. Dates are calculated automatically based on the end of the previous pay period within a company's pay cycle. **Note:** You can only specify a **Date-From** on the first pay period added to a pay cycle, and the subsequent pay period date are auto computed by the system.
Date To	Pay Period end date. Dates are automatically calculated based on the previous pay period end date within a company's pay cycle.
Description	Name of the pay period.
Comment	Additional information.
Status	Status of pay period - Open, Closed, Active.

1. In the Payroll module, select **Payroll, Pay Period** from the menu.
2. On the Pay Period Maintenance form, right-click and select **Add** to add a new pay period.
3. Complete the pay period setup form.

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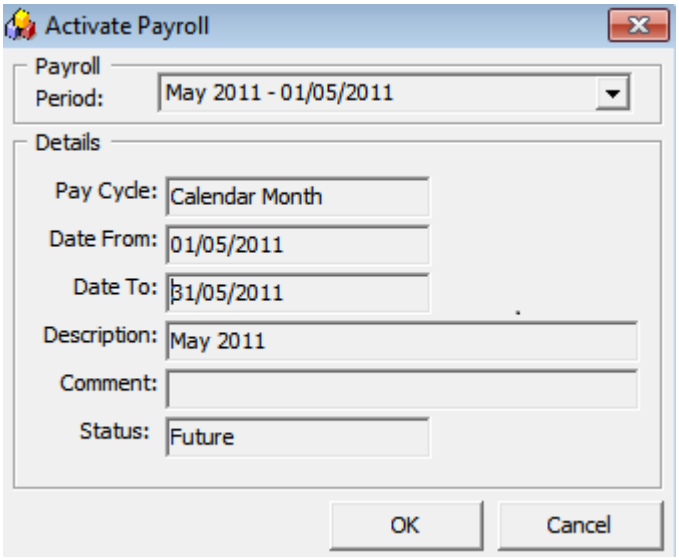
4. Click **Apply** to save the record or **OK** to save and close the form.
5. To delete the pay period, right-click on the period and select **Remove**. You can only remove a pay period that does not have any transactions linked to it.

Activating a Pay Period

In a pay cycles, only one (1) pay period can be activated. Below are the statuses and steps to activate the pay period.

- **Closed (C):** Pay Period is complete and adjustments are not allowed.
- **Open: (O):** Pay Period is still open for manual adjustments and payouts.
- **Future (F):** Pay Period is not yet open, although accruals may be recorded in the period due to a pay out in the previous period.
- **Active (A):** Pay Period is open to all types of changes, including pay sheet updates, contract changes and manual adjustments.

Figure 26-11 Activate Payroll



1. In the Payroll module, select **Payroll, Activate Pay Period** from the menu. You can activate only the future pay period.
2. Click **OK** to proceed. The system generates the pay records for all people with active contracts and sets the new pay period as **Active** and the previous active period as **Open**.

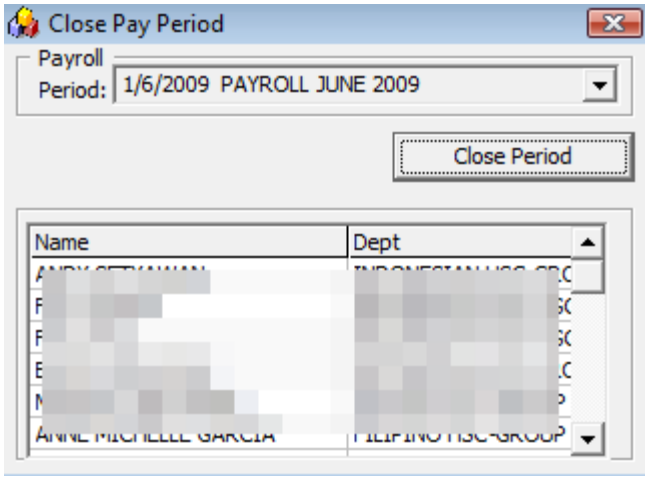
Closing a Pay Period

To ensure the accruals are correctly accounted for, you must close the Pay periods and make no further adjustments or changes thereafter.

Before a pay period can be closed, all contracts within that pay period must be paid out. Otherwise you are not allowed to proceed. If there are unpaid contracts, they are displayed in the grid of the form and you will receive a notification that the Period cannot be closed.

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Figure 26-12 Close Pay Period



1. In the Payroll module, select **Payroll, Close Pay Period**.
2. Select the period from the drop-down list. Only the oldest period within each pay cycle is listed.
3. Click **Close Period** to close. You will receive a “Pay Period Closed” prompt once the period is successfully closed.

By default, the system does not allow you to close a pay period if the pay period end date is after the current system date (PC Date), even though all crew members have been paid. You will receive a notification “Early closing not allowed!” Pay Period end date is DDMMMYYYY when you try to close the period.

This can be changed by setting the parameter group **Payroll, Allow Closing of Pay Period Prior to End of Period = 1**. This setting overrides the above prompt and allows you to close a pay period even though the pay period end date is after the current PC date.

For example;

Current system date: 15-March-2021

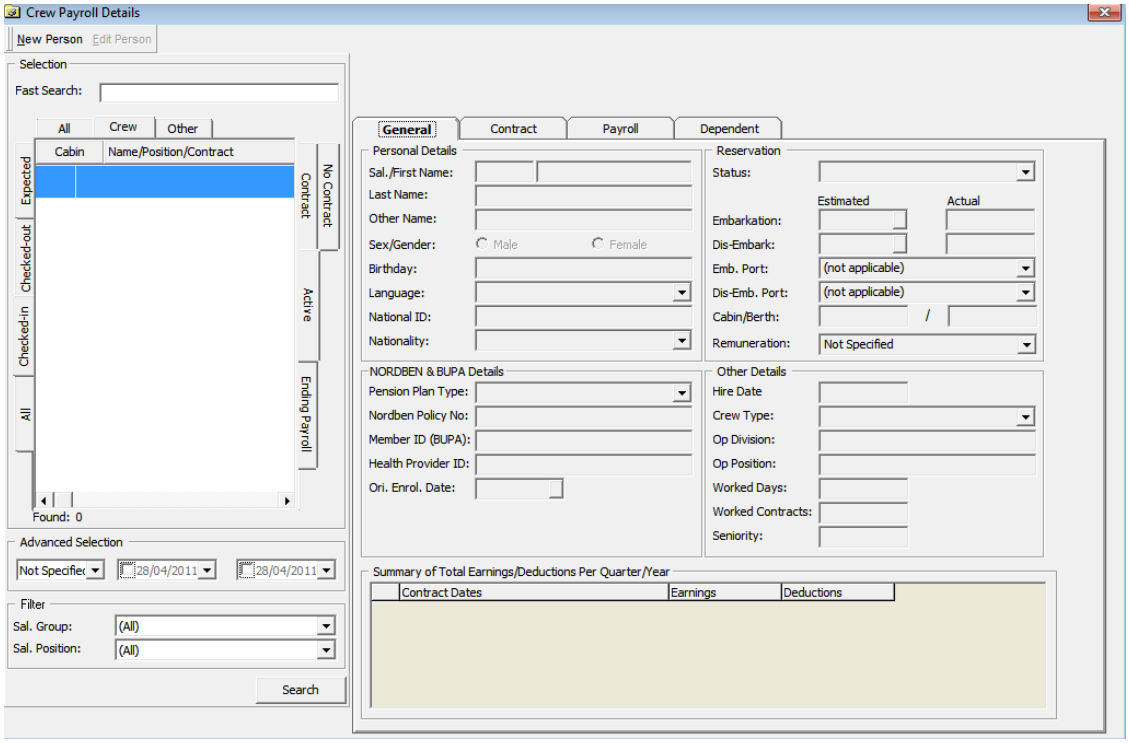
Pay Period end date: 31-March-2021

Crew Detail Maintenance

The Crew Detail Maintenance function is used to maintain the crew’s personal details and contract information. Any payroll activities affecting a single crew member can be performed from within the Crew Payroll Details form.

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Figure 26-13 Classic Crew Payroll Details Information



Crew Search

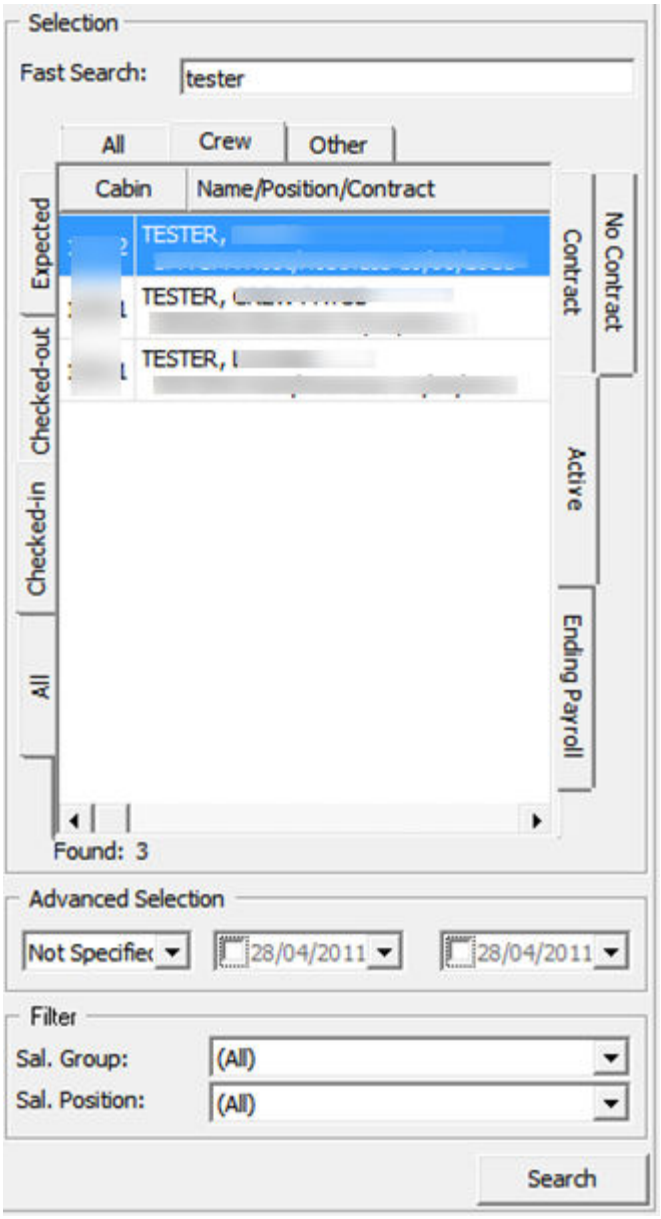
There are various ways to search for crew details in the Payroll module. You can use either of the following:

- Look up the information by entering the crew ID, name or contract status using the Quick Search feature.
- Enter a cabin number in the Fast Search field and press **Enter** to immediately begin the search or leave it idle for 10 seconds for an auto search

If the search results on the grid are greyed out, then the crew member listed is in another pay company instead of the one that is currently active.

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Figure 26-14 Search Panel



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Table 26-8 Search Panel Field Definition

Field	Function
Fast Search	Search by entering the following value: • Last name – requires at least two (2) characters. • Cabin number • Swipe Crew Card • Crew Internal ID • Crew External ID **Note:** For searches using the crew external ID or internal ID, refer to the parameter setting in "Payroll","Display UXP_C_EXTERNALID As Crew ID"
Crew Group	Search by crew group in: • **Crew:** Crew tag with 'C' • **Other:** Crew tag with 'O', which are added through the Payroll system.
Reservation Status	Search by crew reservation status in: • Checked In • Checked Out • Expected
Contract Status	Search by crew with contracts status in: • **Active:** The contract period is on the current pay period or current pay period is not closed yet. • **Contract:** All contracts including history, active and future contracts. • **No Contract:** Include all crew without any contracts assigned. • **Ending Payroll:** List all disembarked crew who still have payroll open on Open, Active and Close pay period. Also lists the crew expected disembarkation date is on Close Pay Period and not linked to any future assignment. **Note:** Enable the parameter "Ending Payroll Alert", listing the crew of ending payroll on a pop-up window upon program start-up.
Advanced Selection	Search the crew embarkation date, debarkation date, or Not On Board status. **Note:** 'Not On Board Status' refers to NOB flag status of future reservations and previous reservations if the date falls under a future assignment date.
Filter	Search by salary group and salary position.

Crew General Details

The General tab of the Crew Details gives you an overview of the selected crew member. It displays the basic crew information such as identification, date of birth, embarkation/ debarkation date, and other information maintained in the Crew Management module. Information for non-crew personnel paid through this payroll is maintained within the Payroll program.

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Figure 26-15 Crew Details

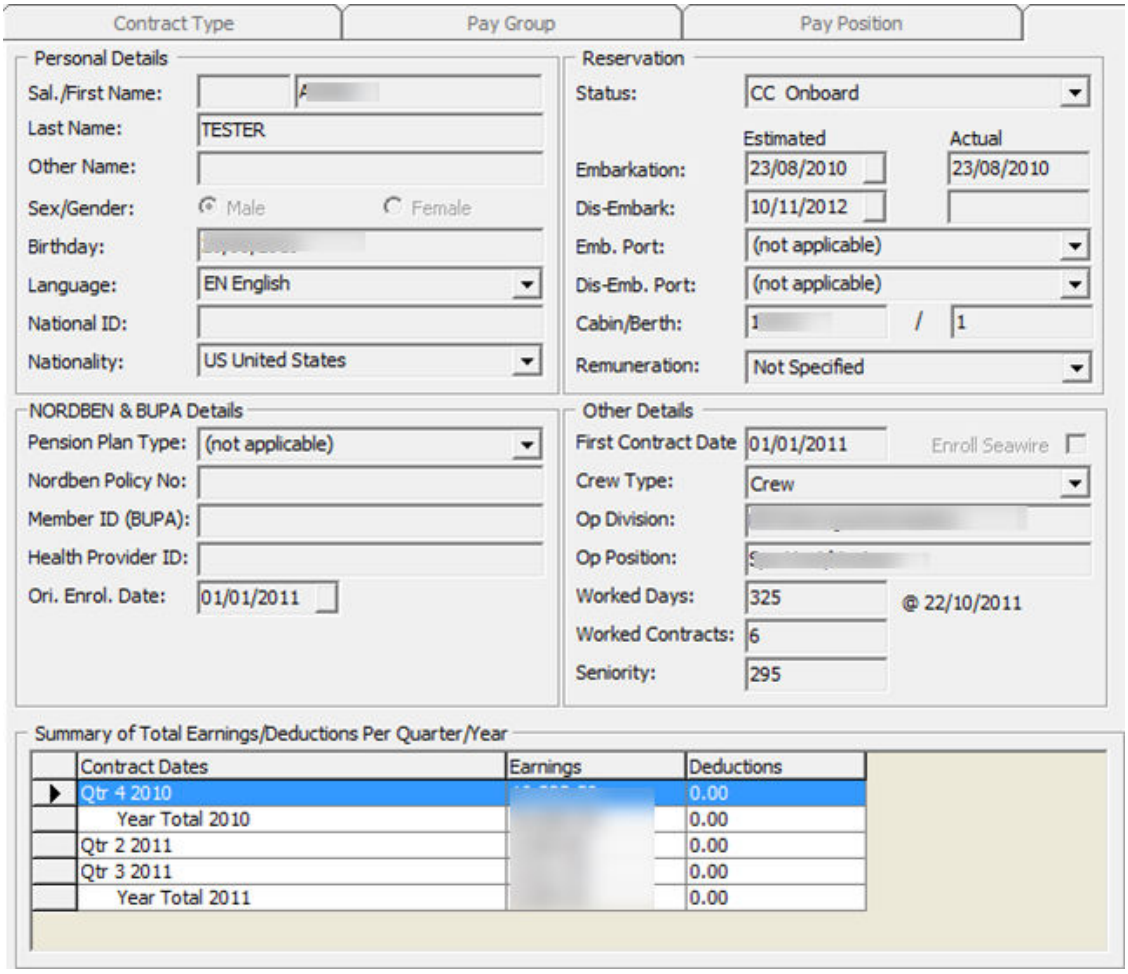


Table 26-9 Crew Details Field Definition

Field	Description
NORDBEN & BUPA Details	Details used for Pension Plan and Medical Plan.
Ori. Enrol. Date	Field is required if 'First Contract Date' is entered.
Remuneration	Remuneration of the crew. Field is locked during edit by Contract Type, Salary Group , or Salary Position.
First Contract Date	Crew join date. This is an optional field controlled by the parameter **Payroll, Optional Join Date**. This field is also available in the **Crew Management module, Edit Information, Other Info**. **Note:** You can define the field name in the **Administration module**, **Label Setup - CMJOIN**.
Enroll Seawire	Flag indicating crew's enrollment in Seawire function.

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Table 26-9 (Cont.) Crew Details Field Definition

Field	Description
Worked Day	The crew contract start date until current system date (PC date).
Worked Contract	Total contract with the payroll company.
Seniority	The First Contract Date until current system date (SPMS date).

Adding Non-Crew member

A non-crew member record is not visible in the Crew Management module as they are not checked-in to the system, and this record can only be found in the Payroll module. However, they can be paid through the Payroll module using below steps.

1. On the **Crew Edit Detail** form, select the **General** tab. This enables a new menu bar **New Person / Edit Person**.
2. Click the **New Person** button to open the Add Personal Detail form.
3. Complete the form and then click **OK** to save.

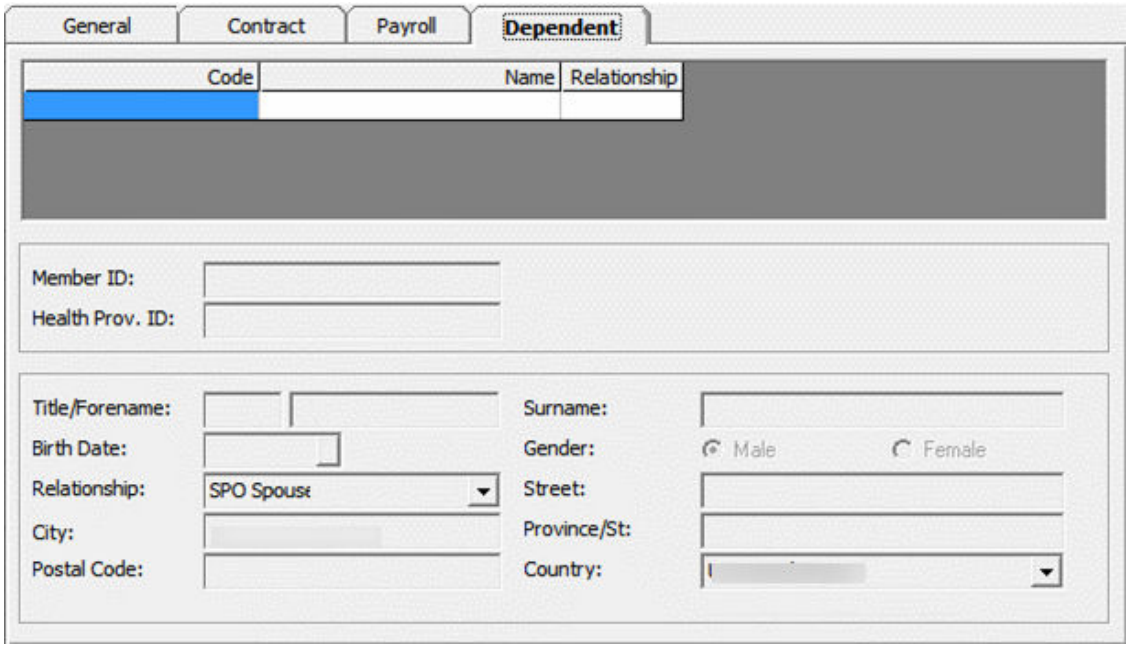
Editing Non-Crew member Information

You can edit the non-crew member general information in the Payroll module by navigating to the **Crew Edit Detail, General tab** and clicking **Edit Person**.

Crew Dependent Details

The Dependent tab stores the crew dependent information. This information is mainly used for crew entitled to a Pension or Medical Plan.

Figure 26-16 Crew Dependent Tab



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Adding/Editing/Removing Dependent Information

1. On the Crew Edit Detail form, select the **Dependent** tab. This enables a selection menu comprised of **New Dependent, Edit Dependent**, and **Remove Dependent**.
2. Click the **New Dependent** and complete the necessary information.
3. Click **Insert** to save the record.
4. To edit the information, click **Edit Dependent**, update the information and click **Update** to save.
5. To remove the information, select **Remove Dependent** and then click **Delete**.

Contract Details Maintenance

The Contract tab stores the contract assignment of a crew member. It comprises five (5) sub-tabs:

- **General:** Includes contract information.
- **Pay Addition:** Includes all the pay codes used to generate a person's gross pay automatically.
- **Pay Deduction:** Includes all pay codes that reflects in the contract and are then deducted from a person's gross pay to come up with a net pay. This could include deductions for home allotments, taxes, garnishments or other expenses.
- **Payout:** Includes all pay codes that reflects in the contract and records distribution of the net pay beyond the information specified in the Contract General information.
- **Benefit**: Includes all of the benefit contribution pay codes by crew contribution and employer contribution.

Creating a Contract

The General tab stores all information related to the contract such as start/end date, pay out currency, salary group and position, maximum cash advance amount and others.

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Figure 26-17 Contract Form

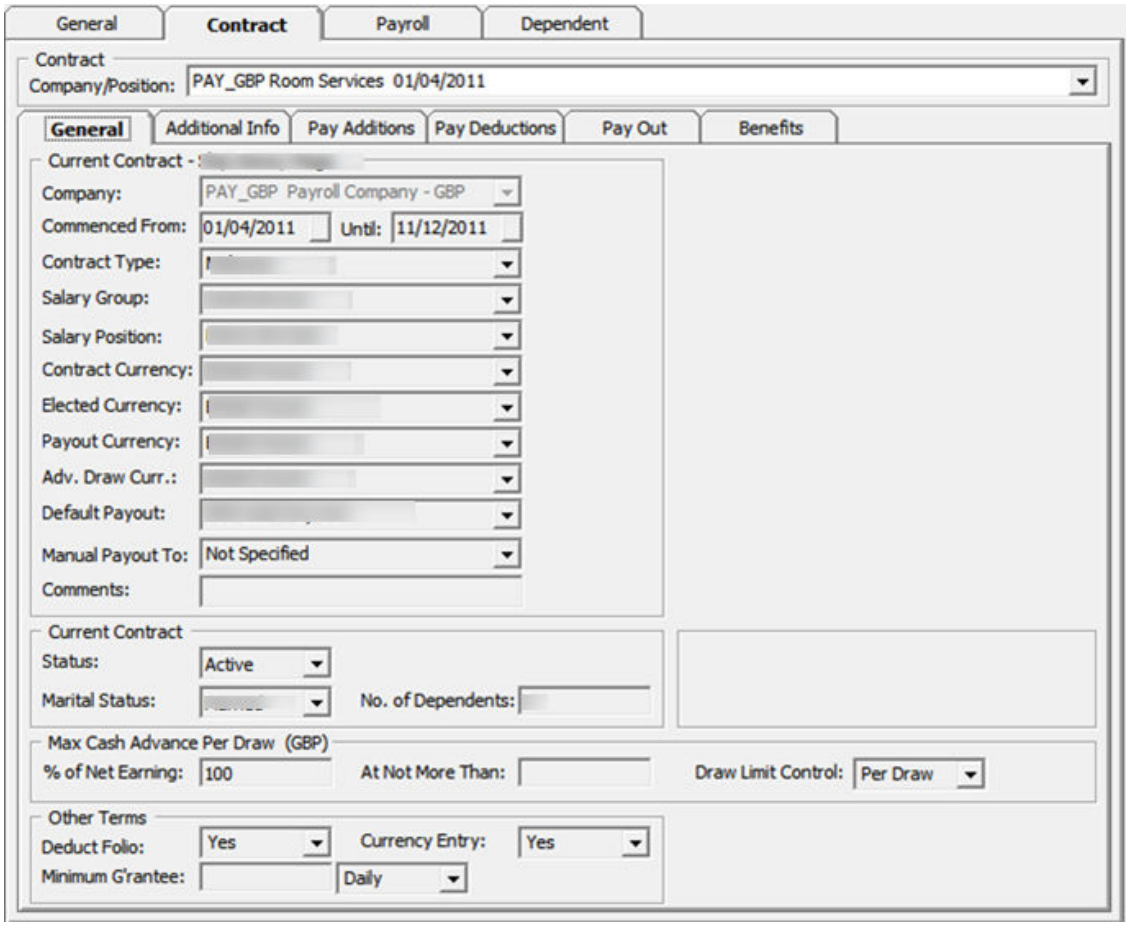


Table 26-10 Contract Details Field Definition

Field	Description
Company	The payroll company for this contract. **Note:** You cannot update this since it comes from an active payroll company.
Commenced From and Until	The beginning and ending dates of the contract. **Note:** You must specify a **Commenced From** date. If the **Until date** is left blank, then the contract will remain active until a final date is entered or a new contract for the same person is created.
Contract Type	Type of contract group.
Salary Group	The department the salary is classified under. See Pay code Maintenance, Salary Group.
Salary Position	Crew Work Position See Pay code Maintenance, Salary Position.
Contract Currency	Currency of the contract.
Elected Currency	Currency used in allotment.

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Table 26-10 (Cont.) Contract Details Field Definition

Field	Description
Payout Currency	Currency used for final payout. **Note:** Currencies must be defined in the SPMS with an active conversion rate. The currency rate and the overall Payroll currency rate must be maintained using Currency Exchange Maintenance.
Adv. Draw Currency	Currency used for cash advance.
Default Payout	Default pay code during payout.
Manual Payout	Default pay code when payout negative balance.
Comment	General comments about this contract and person.
Status	Status of the contract; Close, Active, Inactive.
Marital Status	Marital status of the crew.
No. Of Dependent	No of dependent. Use for tax calculation.
Max Cash Advance	Available balance of the current period as the suggested amount when a Cash Advance is entered. • Percent of Net Earning: Percentage of Cash Advance Withdraw. • At not more than: Maximum amount for Cash Advance Withdraw. • Draw Limit Control: Draw amount per pay period type. **Per Day:** Only allow to withdraw ONCE per day, where day change is based on database server date. **Per Draw:** Allow to draw up to available balance. **Per Pay Period:** Only allowed to withdraw ONCE per pay period. **Not Specified:** Default value is "Per Draw". **Note:** Allows withdrawal up to Bal-To-Date amount is set up in **Companies Setup, Draw Up To Bal-To-Date**.
Deduct Folio	• Onboard payment account used for Payroll deductions?. • **No:** Do not include onboard expenses when payout. • **Yes:** Included onboard expenses during payout • Not Specified: Refers to Companies setup, Deduct Folio. **Note:** You must enable parameter **Payroll, Folio Posting**
Currency Entry	Flag allows currency selection when performing a posting adjustment in **Add New Pay Item, Cash Advance, Quick Posting**.

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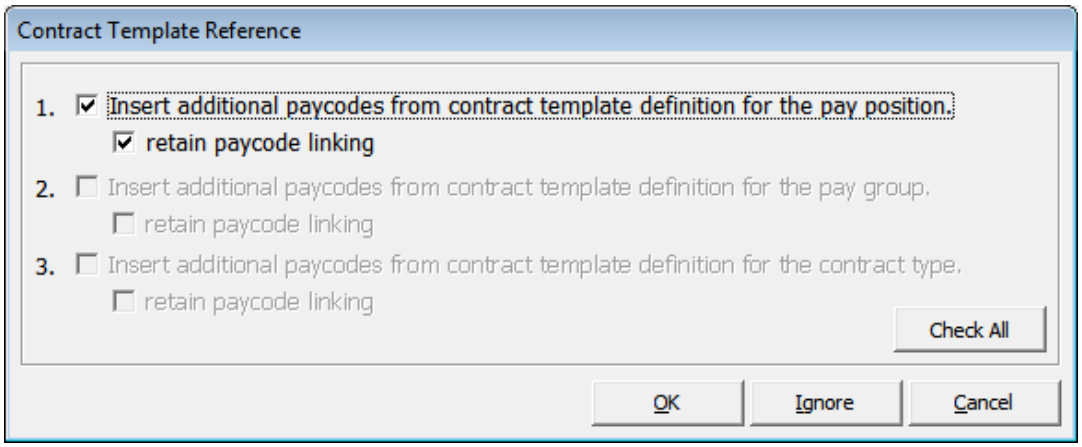
Table 26-10 (Cont.) Contract Details Field Definition

Field	Description
Minimum Guarantee	The minimum guaranteed that must be paid to the crew on each month or year or day.

Adding New Contract

1. Navigate to **Crew Edit Detail** form and select **Contract** tab. This open a new menu with options **New Contract, Edit Contract** and **Remove Contract**.
2. On the Search function, select the **No Contract** tab to list all the non-contracted crew.
3. Select the crew member and navigate to **Contract** tab.
4. Click **New Contract**.
5. On the Add Contract form, complete the contract details form and then click **Apply**.

Figure 26-18 Contract Reference



6. The system prompts the Contract Template Reference form if the selected Salary Position is setup with a Contract Template.
7. Select the option and click **OK** to copy the pay code into new contract or **Ignore** to skip the copy.
8. Continue adding the additional pay code in **Pay Addition, Pay Deduction, Payout** or **Benefit tab**.

Managing Pay Codes

Once you have a contract for a crew member, you can change the contract information by adding, modifying, or removing the pay code. The Crew officer can also manage the pay code by editing or adding a contract.

You can insert more than one (1) record of the same pay code in an assignment with different validity period. If duplicate pay codes have the same validity period or both without a validity period and the contract is:

- **Imported from CMS (with SPD_GUID):** The program only pays once from the larger pay code amount.

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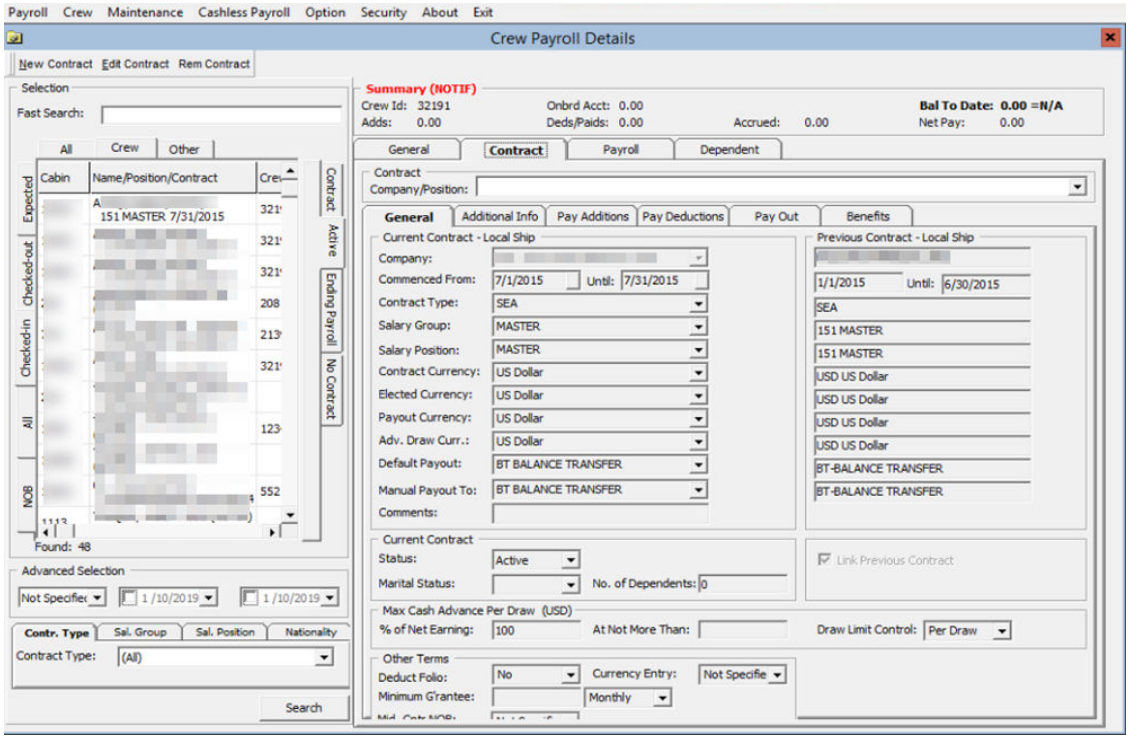
- **Normal contract (without SPD_GUID):** The program duplicates the pay code at the same time.

This only applies to a pay code that has the following calculation method:

"A-PERC", "A-TANO", "A-TAHO", "A-TAOT", "A-FLAT", "D-FLAT", "D-UNTL", "D-PERC", and "D-TAX"

Adding a Pay Code

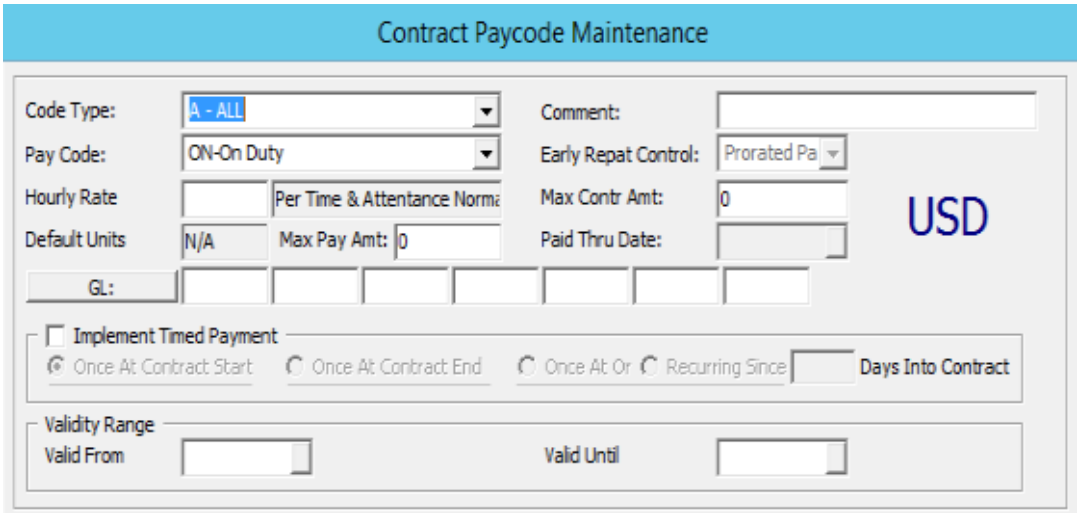
Figure 26-19 Crew Payroll Details



1. On the Crew menu, select the **Edit Detail** menu option.
2. Select the crew member from the crew list and then navigate to the Contract tab.
3. Click **Edit Contract**. This opens the Change Contract form.
4. Select the correct tab to add the different code type to the pay code. See Contract Details Maintenance for tab information. The menu bar at the top of the form changes depending on the tab you select.
5. Click **Add Pay** code. This opens the Contract Pay code Maintenance form and only the code type for the selected tab will populate.

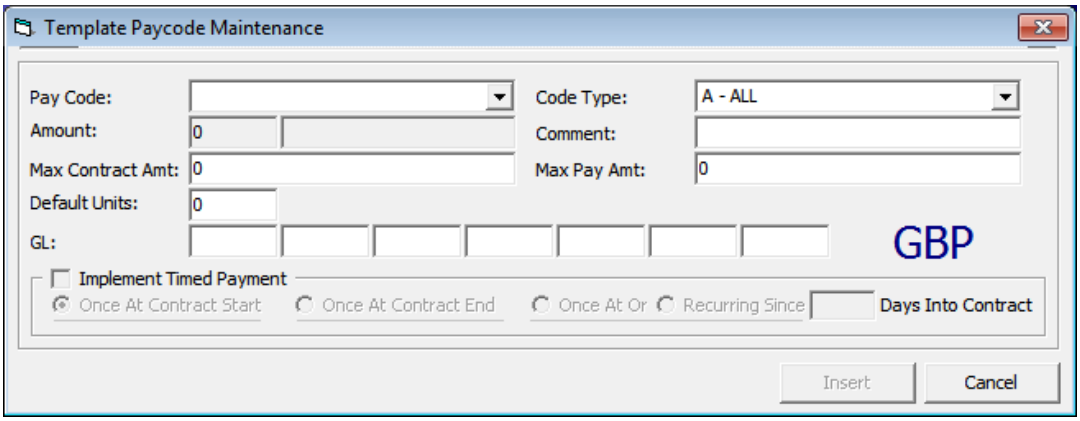
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Figure 26-20 Contract Pay Code Maintenance



6. In the **Pay Code** field, select the applicable code from the drop-down list. The calculation method of the pay code appears in the field beside the Amount.

Figure 26-21 Template Pay Code Maintenance



7. Enter the rate or amount.

> **Note**
>
> The amount field can hold an amount per period, per day, per hour, a flat amount or a percent amount depending upon the selected pay code.

8. Complete the information on the form, click **Insert** and return to the Change Contract form and then click **OK**.
9. On the Contract Template Reference prompt, click **Ignore** if the pay code from Contract Template is already copied onto the contract or skip to copy the pay code. Click **OK** to recopy if there are additional pay codes created in the Contract Template.
10. At the 'Do you want to update the active pay with these changes?' prompt, click **Yes** to recalculate the pay for the current period based on the changes.

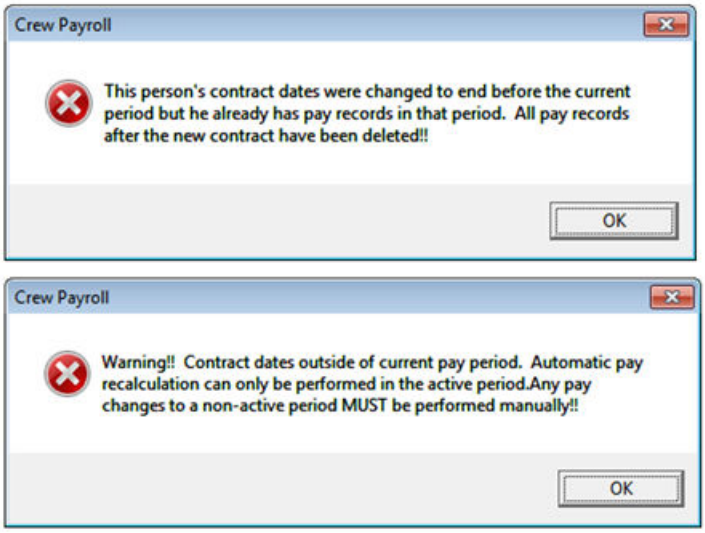
Editing Pay code

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Any changes made to the pay codes are immediately stored in the database when the **Insert, Update** or **Delete** command buttons are clicked, while changes to the general contract information occur only when you click the **Apply** or **OK** buttons.

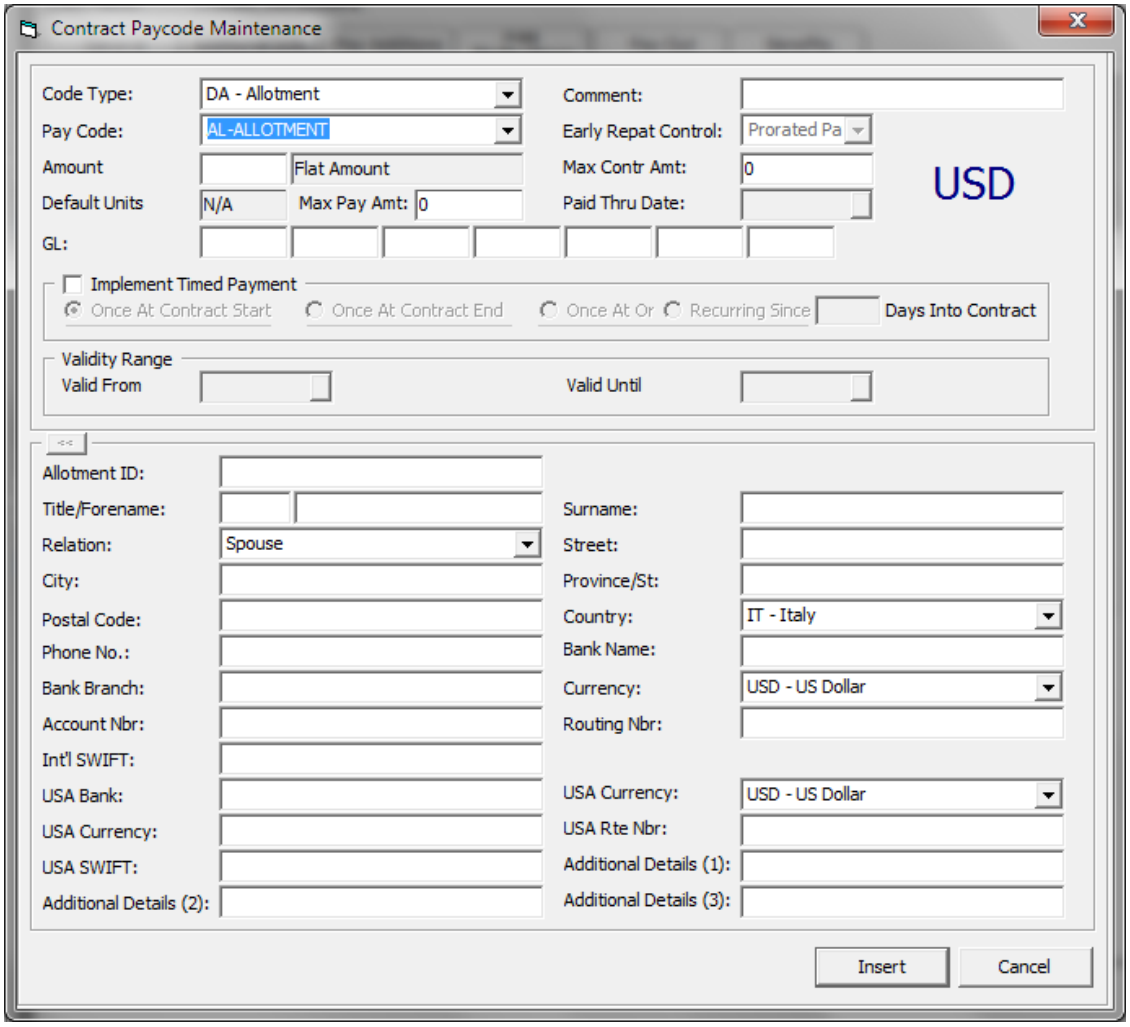
You will receive a warning message that the pay has to be manually adjusted for the period, when a pay code is removed or the contract dates are changed, so that they are no longer active in the current pay period.

Figure 26-22 Manual Adjustment Error Prompts



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Figure 26-23 Contract Pay Code Maintenance



The definition of the additional fields in a pay code form when adding the pay code are as follows:

- **Fully Entitled:** An option used to calculate the Vacation Pay with Early Repatriation.
- **Paid Thru Date:** Used to display in the Payroll GL file when Vacation Pay is assigned.

See chapter Contract Template, Adding Pay code to Contract Template for the basic field definition.

To edit the Contract Pay Code,

1. On the Crew menu, select the **Edit Detail** menu option.
2. Select the crew member from the crew list and then navigate to the **Contract** tab.
3. Click **Edit Contract**. This opens the Change Contract form.
4. Select the pay code and click **Mod Pay Code** to open the Contract Pay code Maintenance form. Change the pay code detail and click **Apply** to save the changes.

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> **Note**
>
> The Code Type and Pay Code cannot be edited.

5. Click **OK** to save and exit the form.
6. In the Contract Template Reference, click **Ignore** if the pay code from Contract Template is already copied into the contract or skip to copy pay code. Clicking **OK** will recopy the pay code if there are additional pay codes created in the Contract Template.
7. You will be prompted with Do you want to update the active pay with these changes?.
8. Click **Yes** to recalculate the pay for the current period based on the changed contract. Click **No**, to save without changing the current pay until the next pay period.

Removing a Pay code

The system only allows you to remove a pay code that has not been used and has zero value. Once the pay code is used, you cannot remove it. Note that you cannot delete a Pay code used for payroll calculation.

1. On the Change Contract form, select the pay code and click **Del Pay** code.
2. On the Contract Pay code Maintenance form, click the **Delete** button and select **OK** at the confirmation prompt.

Creating Multiple Contract

A crew member can have more than one contract for different positions held. The Crew Officer can create an individual contract or a linked contract for the crew member.

- **Individual Contract:** A contract created for the same crew member. This crew member could have more than one contract. The contract criteria can be different or from a different payroll company.
- **Linked Contract:** A contract of the crew member, within the same company, can be linked to another contract, so that the accrued balances from the first contract are automatically moved to the pay items list of the new contract. You can use this feature to perform mid-period promotions and demotions of crew members while retaining the paid out and accrued balances.

When creating multiple contracts, the new contract start date must not overlap the previous contract end date. If there is an overlap, the system displays a notification requesting you to correct the dates.

The steps to create multiple contracts are the similar to Creating a Contract, when the selected crew has an existing contract.

When creating a new contract for a crew member that has a previous contract tied to the same company and its end date is one (1) day less than the start date of the new contract, a Link Previous Contract checkbox will appear on the Change/Add contract form.

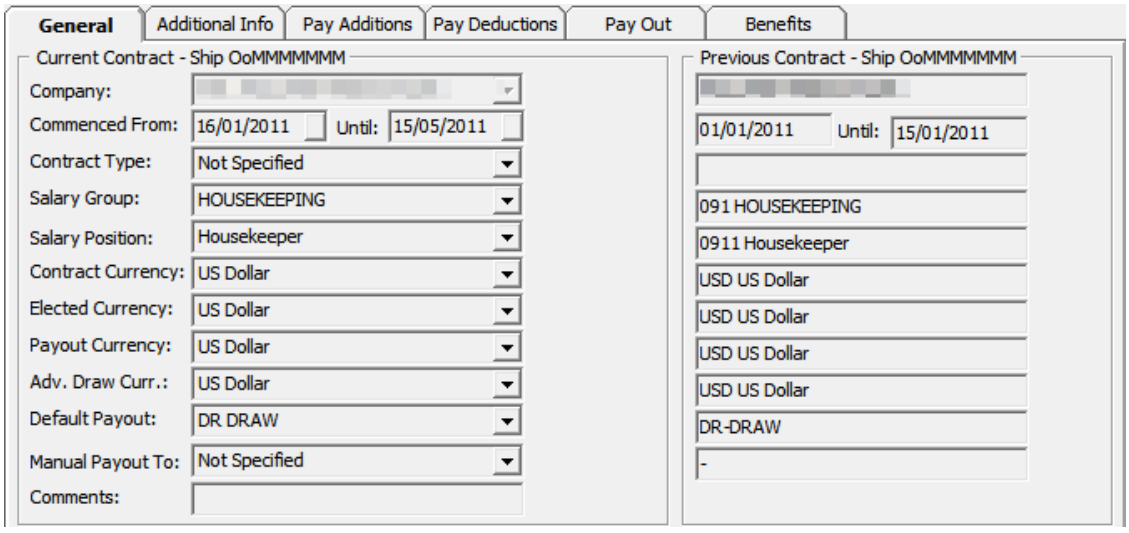
Both of the linked contracts must have the following criteria.

- Must be within the same company.
- Same Contract Currency.
- Second contract must include pay codes for any accrued pay codes that are in the first contract.

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Once the linked contract is created, the crew member name will appear twice in the crew listing with a different contract. When you clicked on the crew member's second contract it will display the previous contract information in the **General** tab under **Contract Detail**.

Figure 26-24 General Tab - Multiple Contract



Removing a Contract

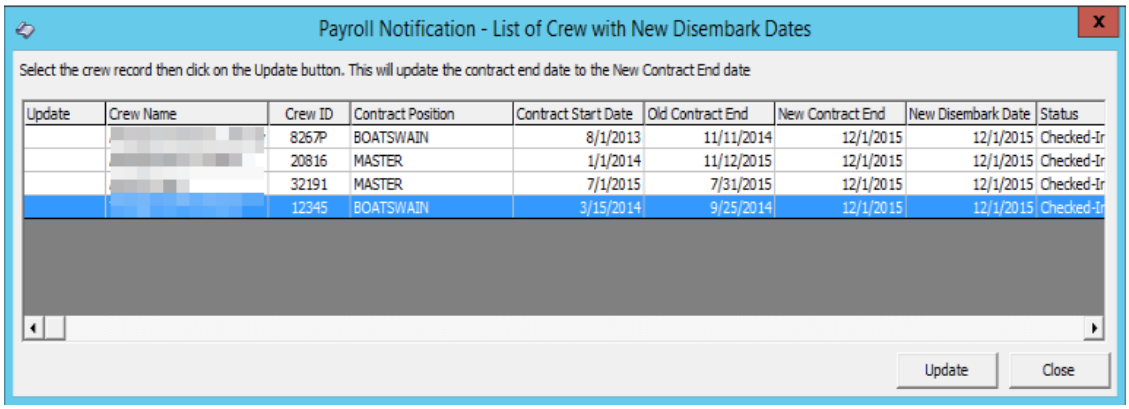
A contract without payroll transactions can be removed from the payroll system using the below steps. Removing a contract is not possible when it has a Payout transaction or manual posting.

1. On the **Edit Detail** screen, **Contract** tab, select **Rem Contract**.
2. On the message prompt, select **Yes** to remove. This will place the crew member in the **No Contract** category.

Updating Contract End Date

The system lists any crew member that has a debarkation date change in Crew Management under 'Payroll Notification – List of Crew with New Disembark Dates', as shown in the diagram below when you first launch the application.

Figure 26-25 Crew with New Debarkation Dates



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If a crew member is being paid for days beyond the contract end date, the change cannot be applied. You will receive a message prompt This person has already been paid out in the active pay period. Contract changes cannot be performed.

To update the contract end date:

1. Select the crew member from the listing and then click the **Update** button.
2. On the confirmation prompt, click **Yes** to update.

You can reopen this list from the **Payroll, Update Contract End Date** option if the screen closes.

Payroll Details

The Payroll tab consists of two tabs.

- **Payroll:** This tab includes a pay period selection and displays the pay sheet, all pay items, and a frame for additional information for each pay item.
- **Benefits:** This tab includes the benefit contribution items and information about each item.

The majority of the payroll activity is performed from the Payroll tab of the Crew Payroll Details.

Pay Items List

In the Payroll tab of the selected crew member, the pay items are listed under the Pay Items List section.

Each of the items in the grid are tied to a record type, described in table below. Details of the item, such as Pay Rate, Units, and Modified Date appear in the **Item/Audit** section when you click on the item. If the payroll is in an active period, a summary of the payroll information is shown in the Edit Details form.

Checking the **Show Balance-To-Date** option switches the view to show the balance to-date amount of each pay item.

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Figure 26-26 Pay Items List

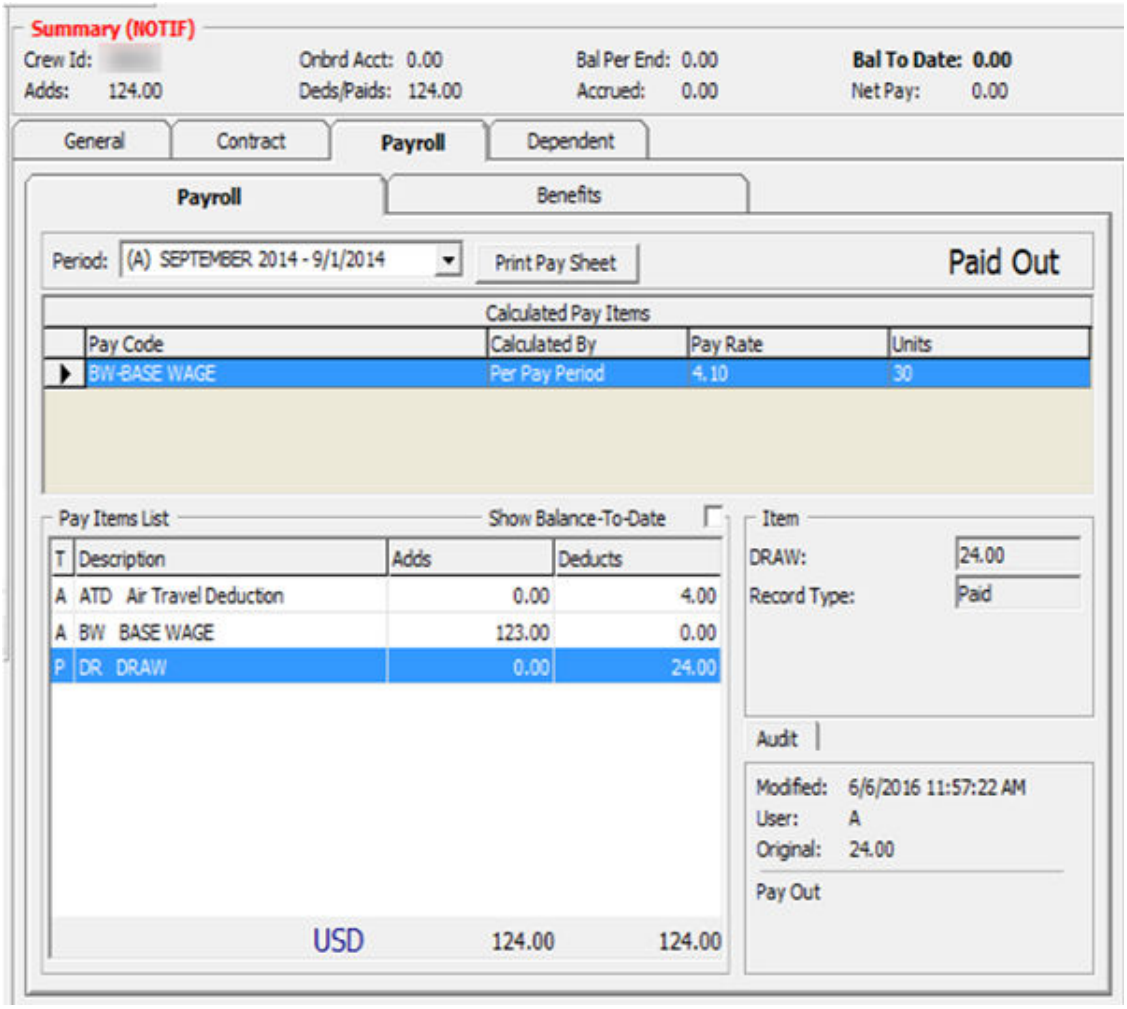


Table 26-11 Pay Items Record Type

Record Type	Description
A	Automatic. Added automatically when assigning or editing pay code from contract template.
M	Manual. Added when the posting is an adjustment such as Add New Pay Item or Cash Advance.
P	Paid out.
R	Accrued from last period.
F	Accrued to next period.
B	Pay accrued from last period.
S	Semi Auto. Pay code adjustment with calculation method defined as percentage.
T	Previous month paid out.

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Update Pay Units

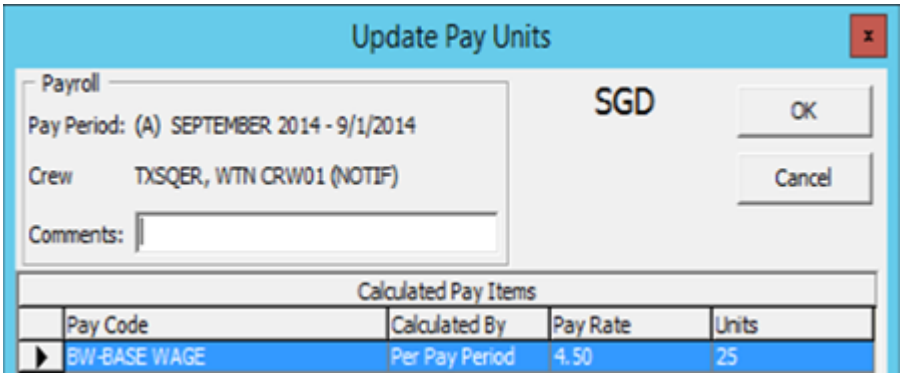
The Pay Sheets contain detailed information, such as unit information, and the pay rate, and is used to determine the pay amount for each pay code in a contract by multiplying the units. You can change the pay units.

You are only allowed to update the pay units for pay codes that have '**Adjust Unit Setup'** enabled in Pay code Maintenance.

Updating Pay Units for a single crew contract.

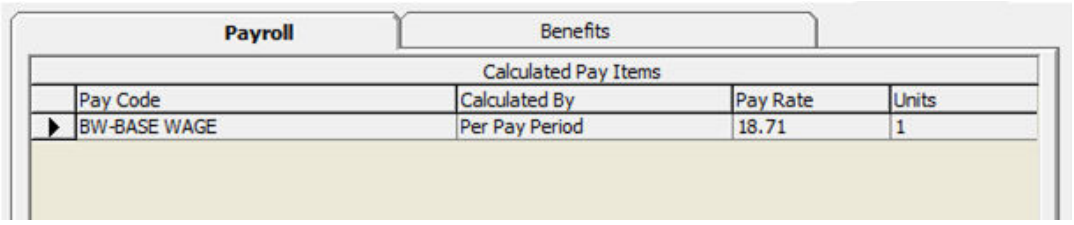
1. From the selected crew, navigate to the **Payroll** tab.
2. Click the **Update Pay Units** button on the Crew Payroll Details form or right-click on the pay code.
3. On the Update Pay Units form, select a **Pay Code** and double-click the **Units** field.
4. Adjust the **value** using the inline edit.
5. Add a **comment** and then click **OK** to save.

Figure 26-27 Update Pay Units



6. Instead of clicking the **Update Pay Units** button, you can also update the pay units under the Payroll tab by right-clicking the pay code in the **Calculate Pay Items'** section.

Figure 26-28 Calculate Pay Items

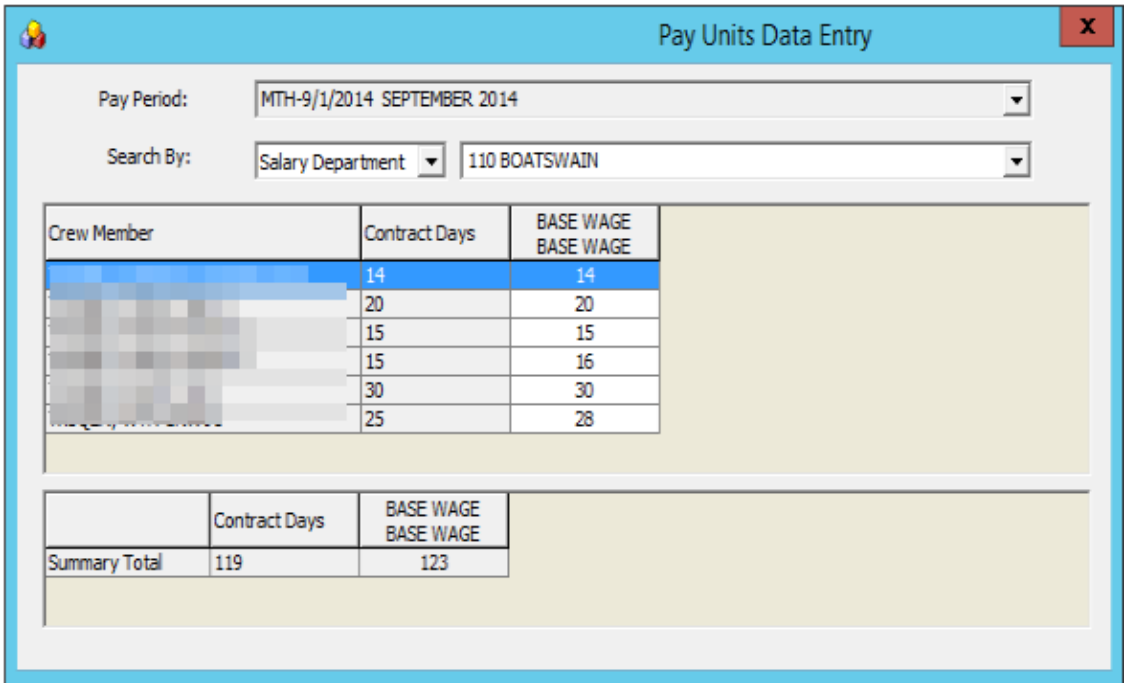


Updating Pay Units for Multiple Contracts

Apart from updating the pay units for a single crew contract, you can also update pay units for Multiple Contracts using the following steps.

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Figure 26-29 Pay Units Data Entry



1. On the **Payroll** menu, select **Update Pay Units** from the menu option.
2. On the Pay Units Data Entry form, select the **Pay Period** and **method** and from the **Search By** fields.
3. Double-click the Base Wage field to enable inline editing. Edit the value and then click **Apply** to save or click **Undo** to revert the changes. The records will be updated and pay is recalculated.

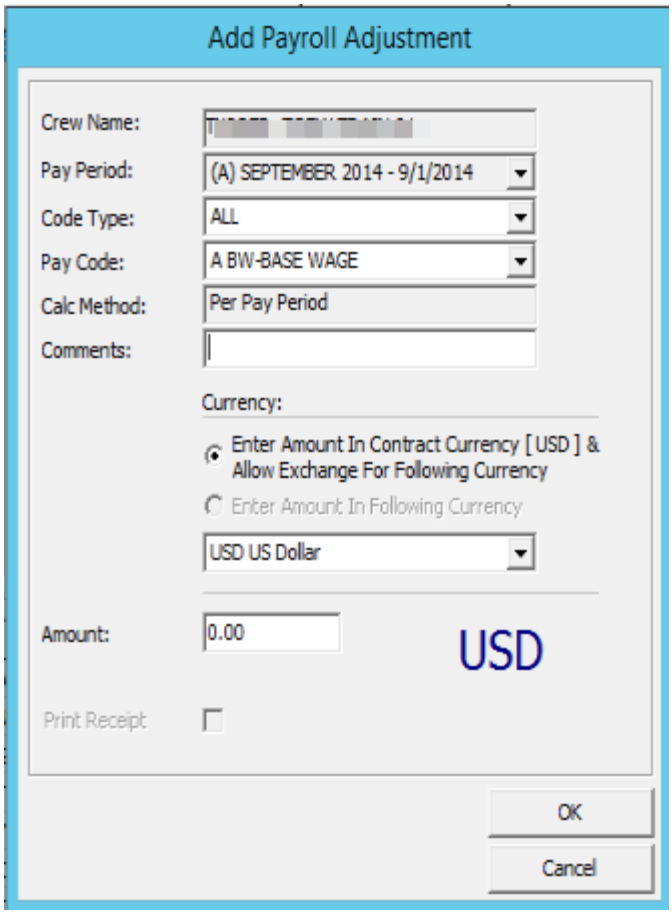
Posting Adjustment

The Posting Adjustments allow you to perform a payroll adjustment or adding an ad-hoc posting to the crew contract.

You can only add or adjust a payroll posting that is not paid in this pay period. Payroll adjustments will only populate for those pay codes that are set up with **Adjustments** in Pay Code Maintenance.

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Figure 26-30 Payroll Adjustment Form



Adding Posting to Single Crew Contracts

1. On the **Payroll** tab of the selected crew account, click the **New Pay Item** button. You can also right-click on the item in the Pay Item List section.
2. On the Add Payroll Adjustment form, select the **Code Type** from the drop-down list. The calculation of the selected code type will be shown in the **Calc Method** field.
3. Enter the comments in the **Comments** field.
4. Check the respective **Currency** option and enter the amount.

> **Note**
>
> There must be a currency exchange rate set up in the Administration module if you select the first option.
>
> The values entered are either in units or amount, depending on the calculation method of the pay code. For example, the pay code for Per Hour or Pay Day calculation is by units.

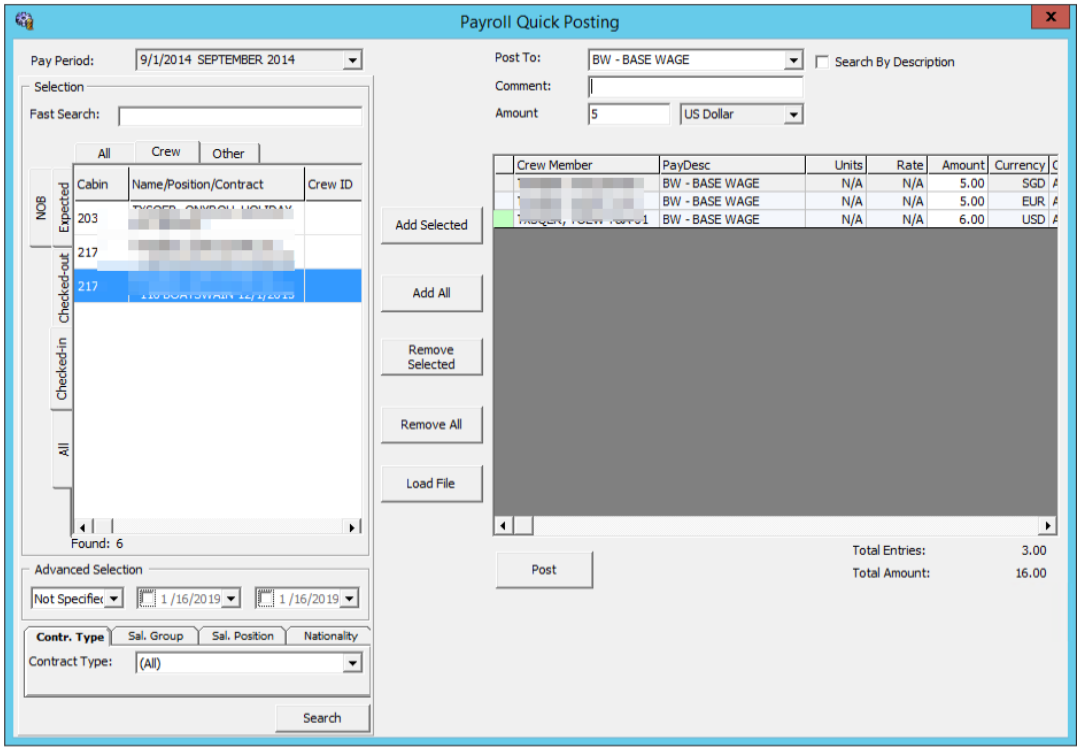
5. Click **OK** to post or **Cancel** to discard. The record type in the Pay Item List for the adjustments posted is **M**.

Adding Postings to Multiple Contracts

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1. From the Payroll menu, select the **Quick Posting** option.
2. Select a **Pay Period** to list the active payroll.
3. Select a pay code from the **Post To** drop-down list. Check the **Search by Description**, to search using the pay code description.
4. Enter a comment in the **Comment** field.
5. Enter an amount or rate in the **Amount** field.
6. Individually select the crew account to post to and then click the **Add Selected**, or use the **Add All** button to add all listed accounts to the grid.
7. To remove an account, use the **Remove Selected** or **Remove All button**.

Figure 26-31 Payroll Quick Posting



8. At this point, you can still change the amount to post in the **Amount** field within the grid.
9. Click the **Post** button to continue.

Adding Postings by File

The Load File option allows you to import bulk adjustments posting using a file import method in comma-separated values (CSV) format. In order for the file import to work, you must follow the format specified in the Appendix, Quick Posting Import File Format chapter.

> **Note**
>
> The Load File validation may not necessarily go into the assignment for the selected company, but it must go either into the assignment that falls under the selected month or into the month of the system date, if none is selected. Priority is given to the date range that matches the selected pay period, followed by the matching selected company.

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1. Repeat steps 1 and 2 of Adding Postings to Multiple Contracts (see above).
2. Click the **Load File** button and browse for the file to import.
3. All valid postings are shown under the **Accepted Entries** section and the rejected ones under the **Rejected Entries** section.

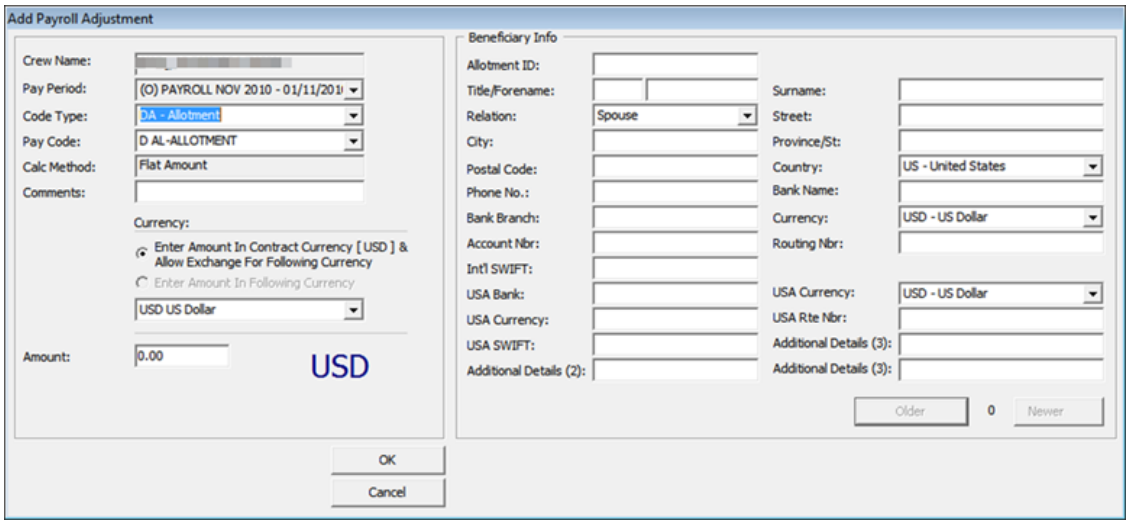
> **Note**
>
> You cannot proceed if there are Rejected Entries and the button **Add Accepted Entries** will be disabled. You must correct the records and retry.

4. Click the **Add Accepted Entries** button to add these records into the posting screen.
5. Click **Post** to post all the records.

Adjusting an Allotment

The Crew Officer can adjust an allotment of the crew member and, at the same time specify the beneficiary of the adjustment, provided the pay code, **Specify To** is enabled in Pay Code Maintenance. An adjustment can be posted only to record type **M**.

Figure 26-32 Payroll Adjustment



1. On the **Payroll** tab of the selected crew account, click the **Void Pay Item** button. You can also right-click on the item in the Pay Item List section.
2. If **Specify To** is enabled, update the beneficiary information.
3. Click the **OK** button to remove the item from the Pay Items List and recalculate the payroll.

Folio Posting

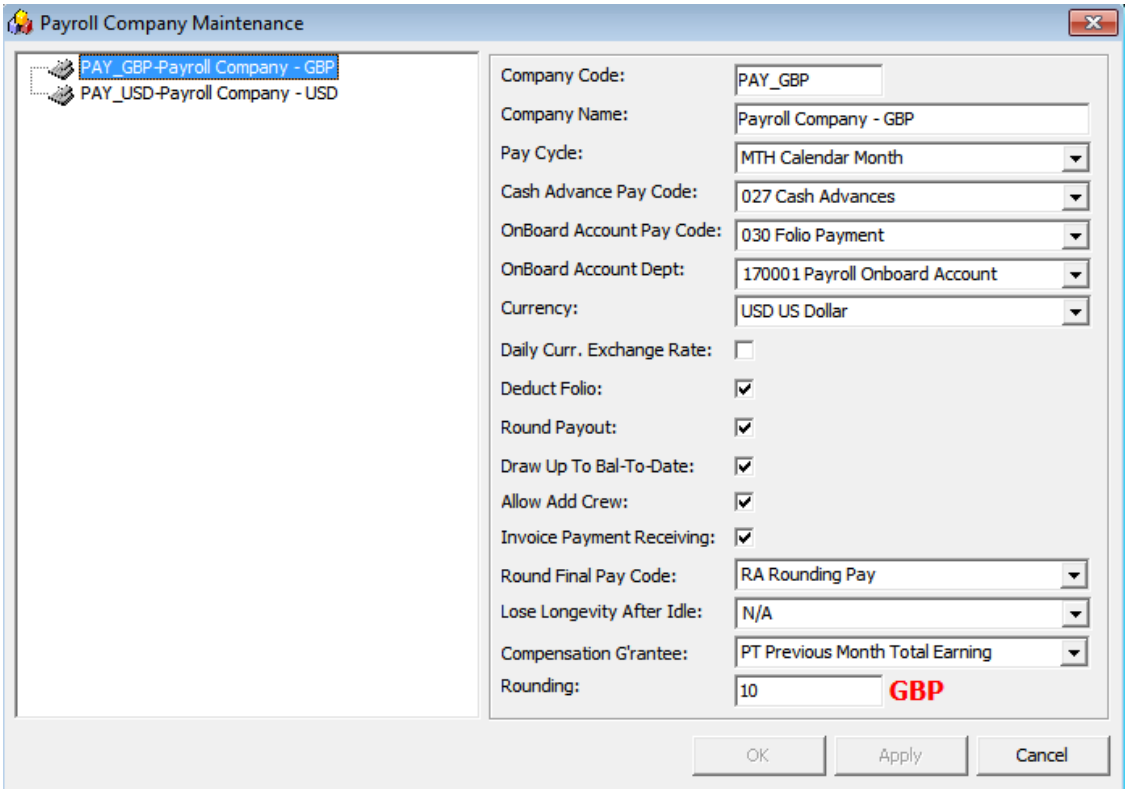
A folio posting is a posting of a crew member's spending while onboard. Folio Postings that are deductible from a payroll payout must have the following settings:

- The parameter **Folio Posting** is enabled or flagged with **Y**.
- **The Deduct Folio** option is checked in to the Payroll Companies Setup.

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- **The Deduct Folio** option is flagged as **Yes** on the crew assignment setup.

Figure 26-33 Payroll Company Maintenance



When onboard expenses are settled through **Pay Invoice** in the Crew module, the amount is transferred into the payroll as a pay deduction, allowing onboard expenses to be deducted.

In order for this to work, you need to define the following settings:

- The **allow Invoice Payment Receiving** option is selected on the Payroll Company setup.
- The Payment department in the Crew module is the same as **Onboard Account Department** in Payroll Companies.

Transferring Folio Postings to Payroll

1. Log in to the Crew module and select a crew member from the Search Panel.
2. Click the **Pay Invoice** button.
3. Settle the invoice to Payroll Deductible payment code.

> **Note**
>
> When a Void is performed from the Crew module using the **Void** button, the pay deduction in the Payroll module is reversed. Similarly, when the **Void Pay Items** in the Payroll module is used, the Folio Payment in the Crew module is reversed.

4. You cannot transfer the Pay Invoice into the Payroll system when:
   a. The Crew is paid

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b. The Pay Period is closed

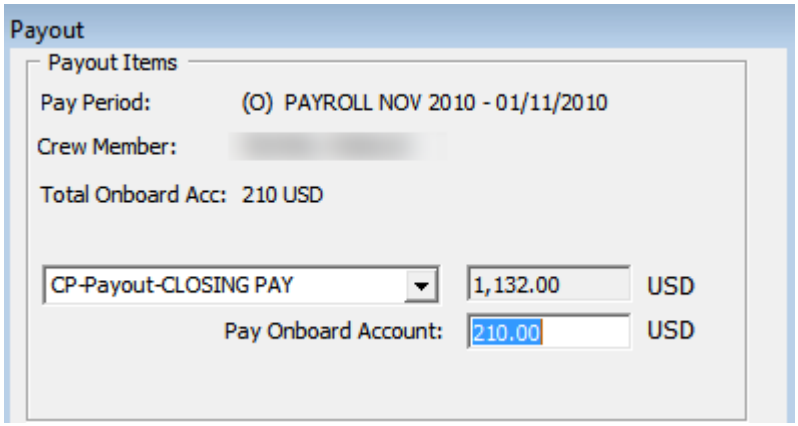
c. The Crew member does not have contract assign.

When settling the invoice, the crew can opt to deduct the invoice from payroll or not. If a crew opt not to settle the invoice to payroll, the folio balance does not appear in the crew member's payroll statement as a deduction.

Performing a Folio Payout Posting

If the folio posting is not settled through the Crew module, the deduction of the onboard expenses is included during the payroll payout. Once the payout is done, you cannot undo the folio payout posting.

Figure 26-34 Folio Payout Posting



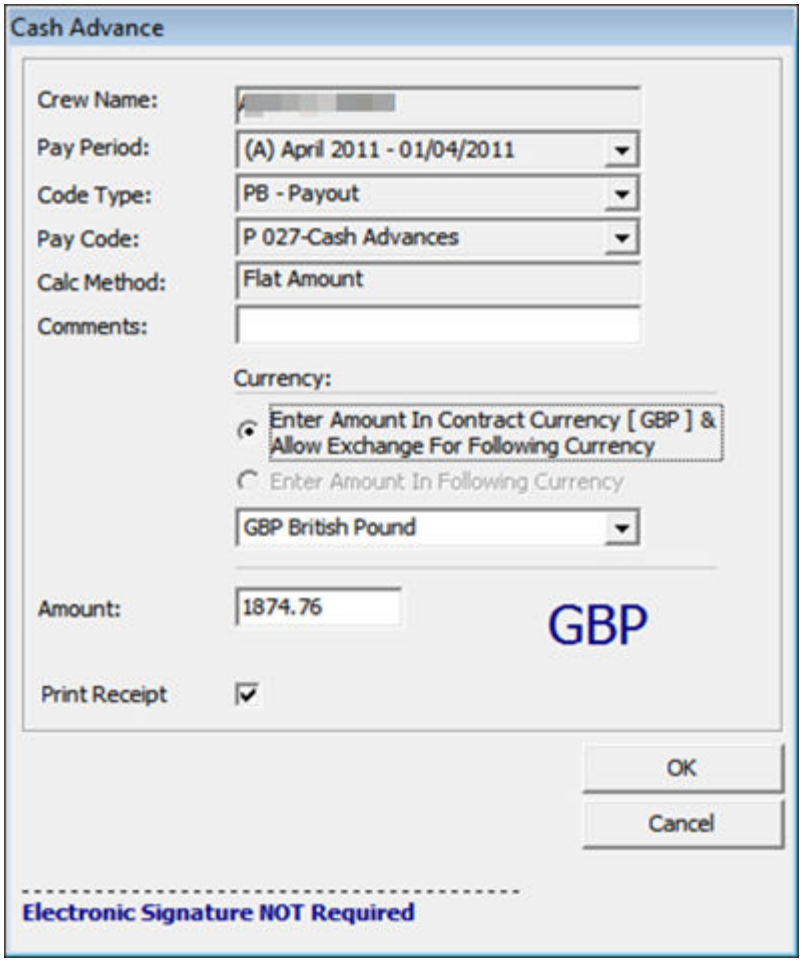
Cash Advance Posting

The Cash Advance feature handles the early pay out made against the anticipated balance for the month. A cash advance pay code is required in the Payroll Company under **Cash Advance Pay Code** per the following criteria:

- **Apply Order:** Greater than other pay items pay code.
- **Calculation Method:** P-FLAT - Flat Amount
- **Adjustment option:** Checked as payroll adjustment.

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Figure 26-35 Cash Advance Posting



1. On the **Payroll** tab of the selected crew account, click the **Cash Advance** button. You can also right-click on the item in the Pay Item List section.
2. Enter the comment in the **Comment** field.
3. At the Currency field, select the **Currency** option and the currency.
4. Enter the amount to advance in the **Amount** field.
5. Check the **Print Receipt** if a receipt is required. You can set this as the default in the parameter **Default Receipt Printing During Cash Advance**.
6. Click **OK** to post the cash advance.
7. To void the cash advance, use the **Void Pay Items** or right-click on the posting.

The cash advance amount is controlled by these two (2) settings:

- **Draw Up to Bal-To-Date** in Payroll Companies Maintenance is checked.
- When this field is checked, the maximum cash advance amount allowed is per value in Bal to Date of the Crew Details summary screen.

1. **Max Cash Advance** in Crew Contract.

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2. If the Max Cash Advance is set up, the system always calculates the value based on the **% of Net Earning**, followed by the value in **At Not More Than** field. If the **% of Net Earning** has no value, then the value of the calculated percentage applies.

Below is an example of the calculation.

- Bal-To-Date: $500
- Monthly: $2700
- % of Net Earning: 50%
- At Not More Than: $300

If **"Bal-To-Date"** is selected: The cash advance amount is $250 ($500x50%).

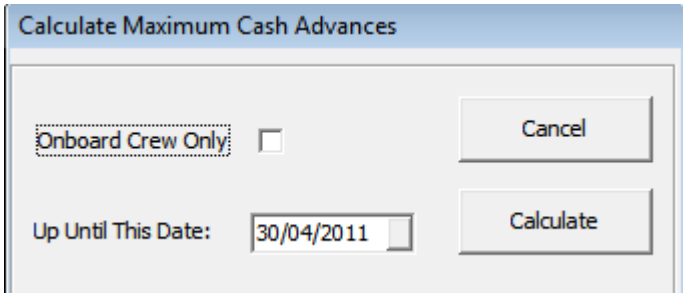
If **"Bal-To-Date"** is deselected: The cash advance amount is $300 ($2700x50%=$1350). Since the **At Not More Than** amount is $300, the withdraw amount is limited to $300 even though the calculated amount is more.

The **Calculate Advance** in the Payroll menu is a function that prepares a report, listing the available cash advances by crew member, using a special form to perform these calculations and placing the results in the Contract record for each crew member.

The options are:

- **Onboard Crew Only** is an option for companies that use 12 month contracts, and they only include crew currently onboard in the report.
- **Up Until This Date** calculates the available cash advance amounts up to the date specified. This process must be performed for each company.

Figure 26-36 Calculate Maximum Cash Advances



When you click the **Calculate** button, you generate and store the available cash amount in the database and in a report. In the following example, you have the CTR_MAX_ADVANCE_CALC which calculates based on the Per Pay Period Pay code. The formula used is *(base wage) / 30 (total days of current month) x 20 days*.

Update Total

The **Update Total** button updates all crew contracts that have calculation changes, such as a pay rate change or a currency rate change. Also, it can recreate the pay sheet if it is missing. This happens when a new pay period is activated but somehow the crew payroll only shows until the previous pay period. There are a few areas to process the Update Total.

- Update Total at Pay Period setup.
- Update Total upon system date change using the parameter **Update BTD Total Upon System Date Change** set as enabled.

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- Update Total when generating the Payroll GL file when ‘Update Total Prior’ is configured as enabled.

> **Note**
>
> The Update total is only available when there is unpaid payroll in the Open/Active pay period.

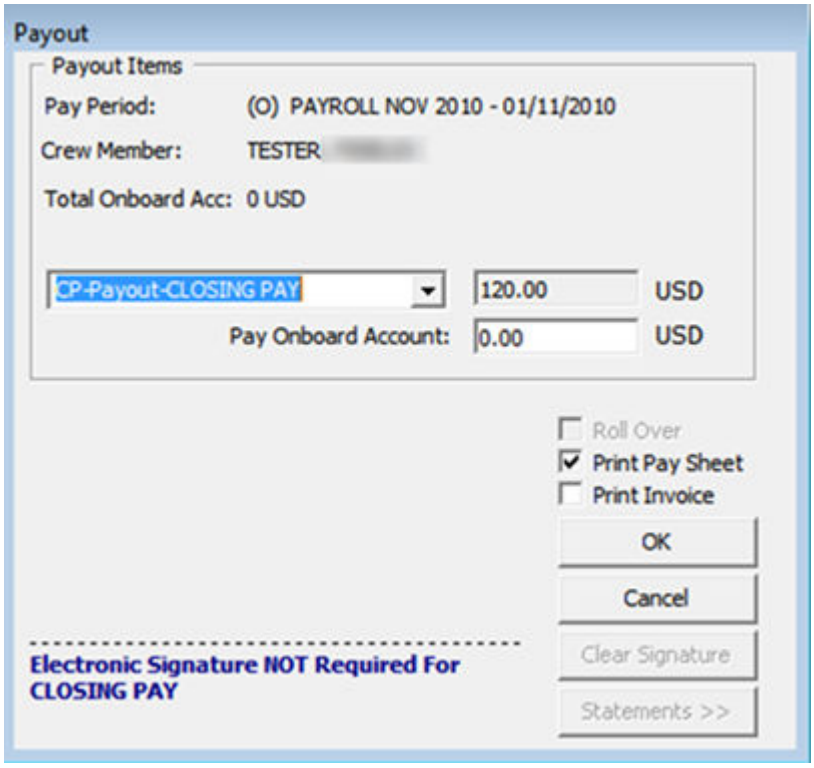
1. Access the Pay Period Maintenance form from the **Payroll menu, Pay Periods**.
2. Select the pay period with **Open** or **Active** status and then click **Update Total**.
3. The system prompts a notification for the number of unpaid payrolls to update. Click **Yes** to proceed or **No** to return to the previous screen.
4. Once the update progress total is done, an error log screen prompts if a crew pay is missing or requires a setting.

Payout Process

The Payout process pays wages to crew members on every pay period. Crew members who have an open payroll from a prior pay period cannot receive their payout for the current pay period. Instead you must pay out the prior payroll before proceeding to pay the current pay period.

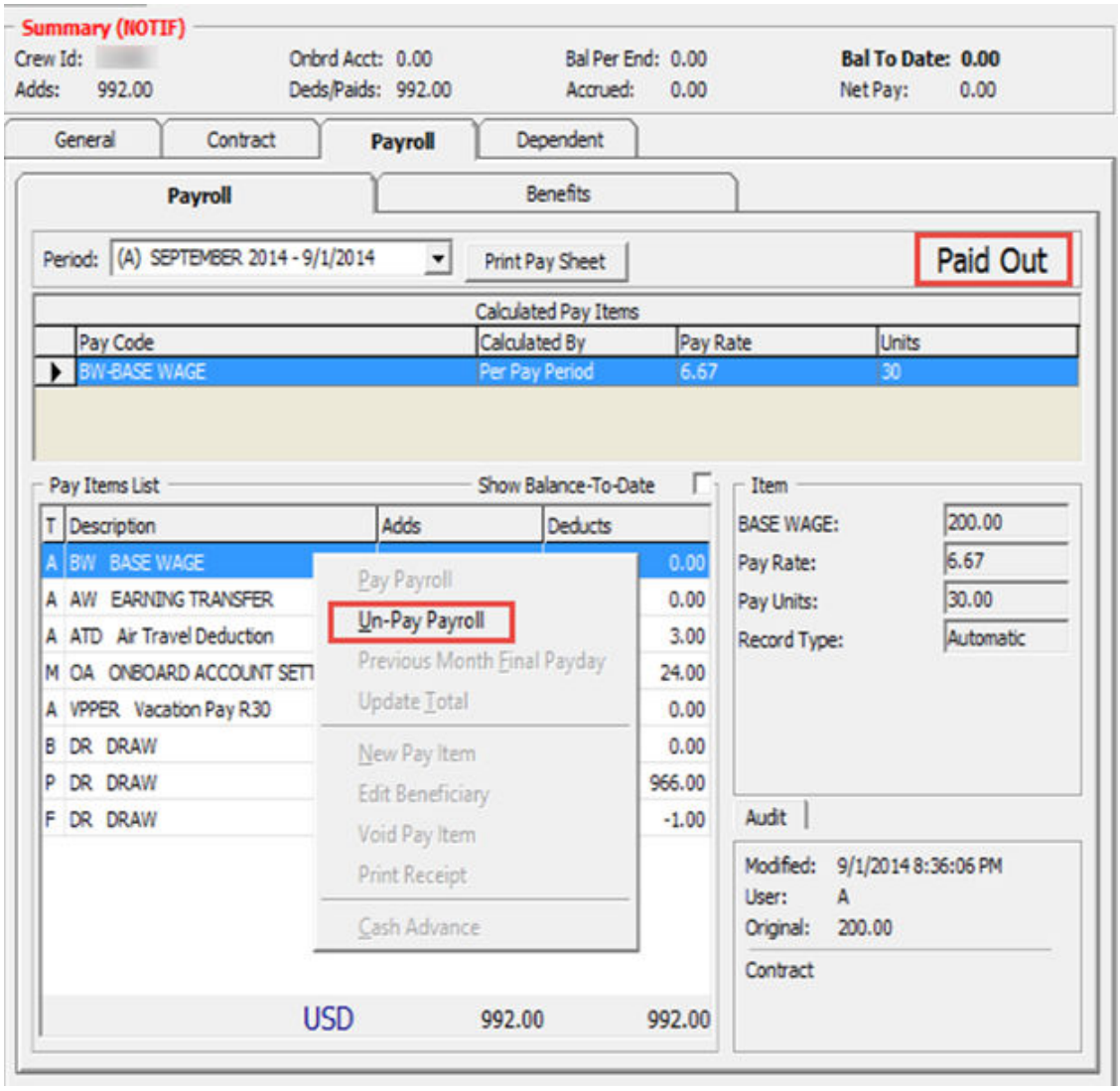
Once the payout is performed, no adjustments can be made for that period.

Figure 26-37 Payout Process



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Figure 26-38 Payout Form



Paying out to Individual Crew

1. Select the crew member from the **Crew Edit Details** screen and navigate to the **Payroll** tab.
2. Select the pay period and click **Pay Payroll**.
3. On the Payout form, use the default payout pay code or select another from the drop-down list.
4. Change the folio amount if necessary.

> **Note**
>
> The folio payments made at payout are based on the **Deduct Folio** setting in the crew contract setup, payroll companies' setup, and the parameter setup. If the folio amount is changed, the net payout recalculates.

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5. Check the **Roll Over** option only if you need to accrue payout to next pay period.

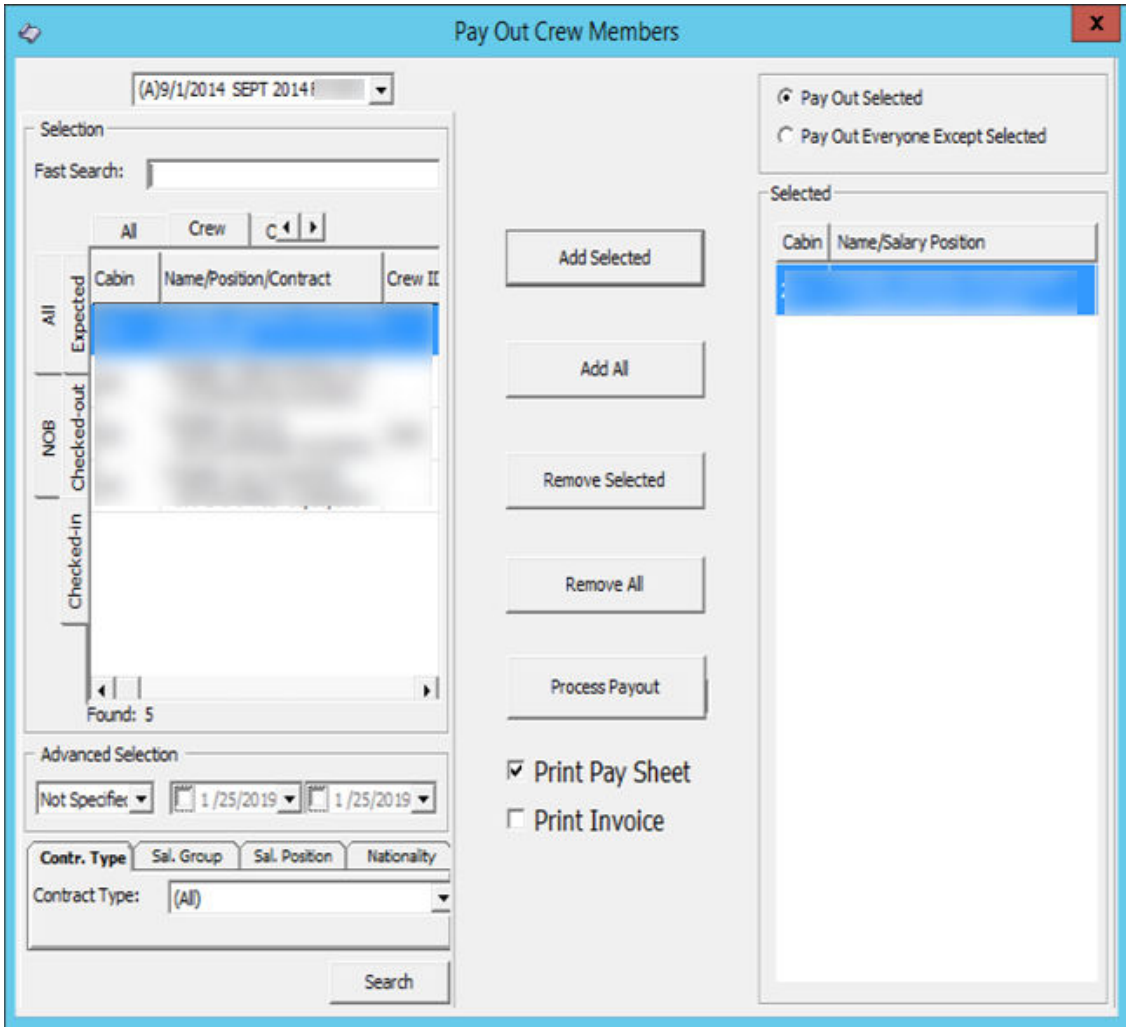
> **Note**
>
> The **Roll Over** option is enabled when the payout pay code is set to *Accrued* and the contract has not ended. This moves the pay period to next and no additional transactions can be made against the crew member account within that period.

6. Check the **Print Pay Sheet** option if required. If printing is required for all, you may default the checkbox by enabling the parameter **Default Pay Sheet Printing During Payout**.
7. Check the **Print Invoice** option if required.
8. Click **OK** to proceed with payout.

Paying Multiple Crew Members

Other than performing a payout to an individual, you can also perform a bulk payout.

Figure 26-39 Pay Out Multiple Crew Members



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1. On the **Payroll** menu, select **Payout**.
2. On the **Pay Out Crew members** screen, select the **pay period** and the crew members. Click **Add Selected** to move the selection to the right pane. To exclude the selected crew select the name(s) from the grid and click **Remove Selected** or **Remove All**.
3. Select the correct payout option.
4. Check the **Print Pay Sheet /Print Invoice** option if required.
5. Click the **Process Payout** button when ready, and click the **Yes** button at the confirmation prompt.
6. A payout progress box will appear with the **Stop Payout** option, allowing you to terminate the process for the remaining crew members.
7. The pay sheet and invoices are printed once the payout is processed for each crew member.

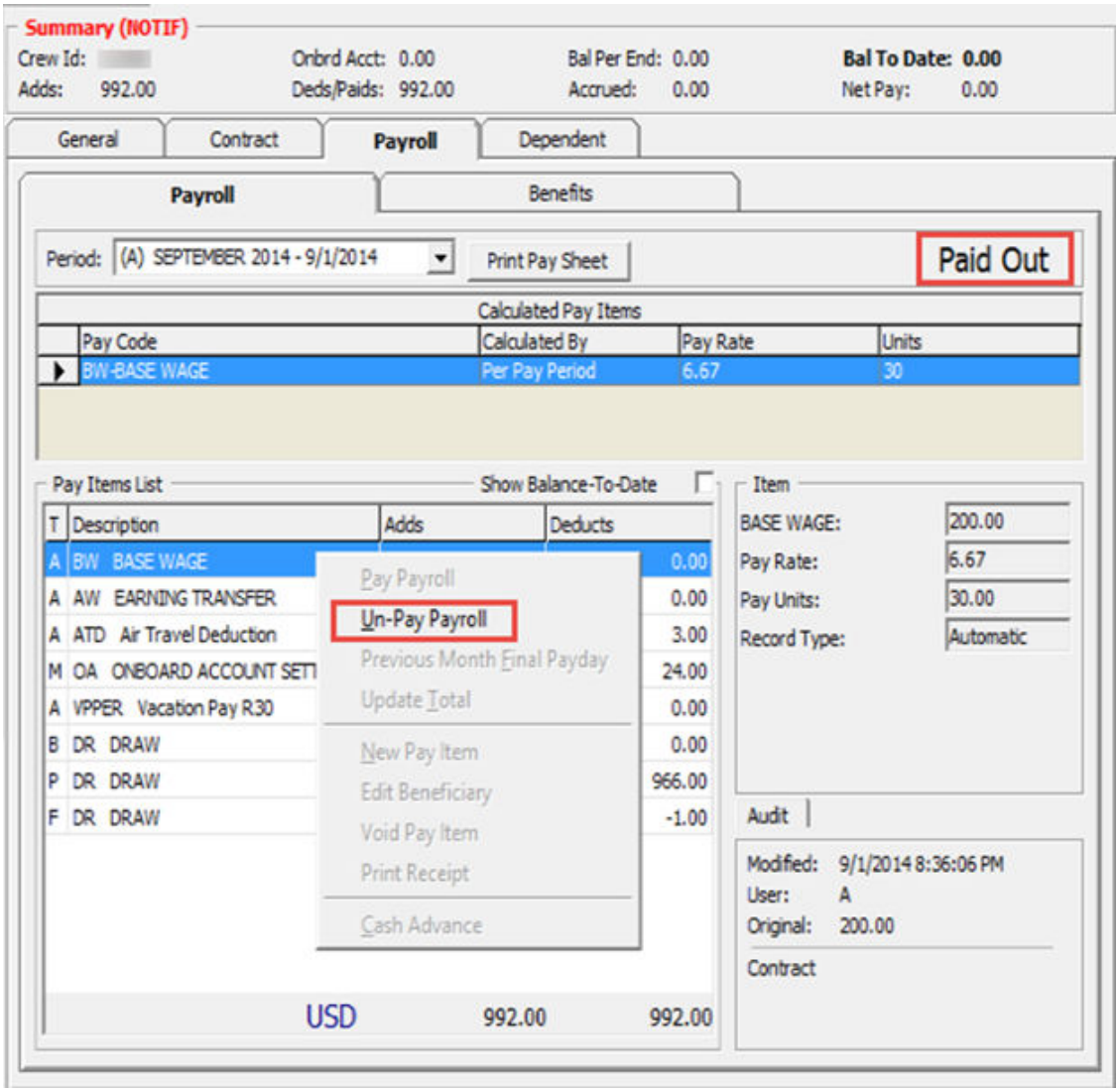
Reversing a Pay Out

A Pay Out can only be reversed for the following cases:

- Pay Period status is **Open/Active**.
- No Pay Out after the transaction you wish to reverse is reversed.

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Figure 26-40 Un-Pay Payroll Option



1. Navigate to the **Payroll** tab of the selected crew member.
2. Right-click the **Paid Out** caption of the Payroll tab or on the Pay Items List select **Un-Pay Payroll** from the option list.
3. At the confirmation prompt, click **Yes** to proceed. This only reverses the pay out and all accrued amounts and does not reverse the folio payment.

To pay the rounded-up payout amount, enable the following settings in the Payroll Companies setup screen:

- Round Payout
- Round Final Pay code

This will accrue the remaining pennies to the next pay period and will pay them on the final pay using a separate pay code defined in the **Round Final Pay code**. The following table is an example of the rounded payout.

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Table 26-12 Payout Rounding

Without Rounding	Rounding	Rounded Amount	Pennies Amount accrued
$1341.65	0	$1341.65	-
$1341.65	2	$1342	-$0.35
$1341.65	5	$1345	-$3.35
$1341.65	10	$1350	-$8.35
$1341.65	-10	$1340	$1.65
$1341.65	-5	$1340	$1.65
$1341.65	-1	$1341	$0.65

> **Note**
>
> If the contract currency is different from the onboard currency, the rounding refers to the **Minimum Denomination** in the Currency Exchange Rate setup.
>
> Rounding is not applicable to multiple pay codes. The multiple payout does not use the Minimum Denomination from the Currency Exchange Rate but uses the default rounding instead.

Mark Paid

Reports are produced to aid the calculation of the payroll cash request. The report is generated based on any payments pending in the system. The Payments pending consists of any form of pay outs performed using the multiple crew member payout form or cash advances that were entered in the Quick Posting form. The pay outs and cash advances entered using the Crew Details forms are assumed to have been paid immediately, without the use of a cash request.

This is to ensure that the cash request includes the correct payments.

Figure 26-41 Mark Pay Outs and Cash Advance as Paid



1. After performing the cash advance in Quick Posting or when multiple crew member payouts are processed, select **Mark Paid** on the Payroll menu.
2. Select the corresponding **pay code** from the drop-down menu to list all of the pending payments.

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3. Double-click on each crew member's account to mark the payment as paid or click the **Check All** button to mark all payments, then click **Mark As Paid** to update. This places an '**X**' in the transaction.

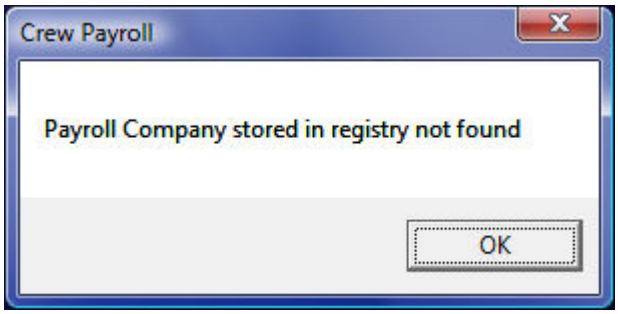
Payroll Company Setup Default System Code

A payroll company is used to separate the multiple payrolls that have different processing cycles or different payroll currencies.

Before you begin using the Payroll module, you must define a default system code in the parameter group, **Payroll, Default Payout** and set up a Payroll Company. Without this code and a payroll company, you cannot continue using the system and will receive a warning prompt at the first launch of the application.

At the first run of the payroll system, the payroll company will be stored in the registry. If you change to a different payroll company, the message below appears. Click **OK** to store the company record in the registry.

Figure 26-42 Registry Not Found



Setting up a Default System Pay code

See the Pay code Maintenance chapter for information on how to set up required codes.

Setting up New Payroll Company

You can set up as many payroll companies as required.

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Figure 26-43 Payroll Company Maintenance

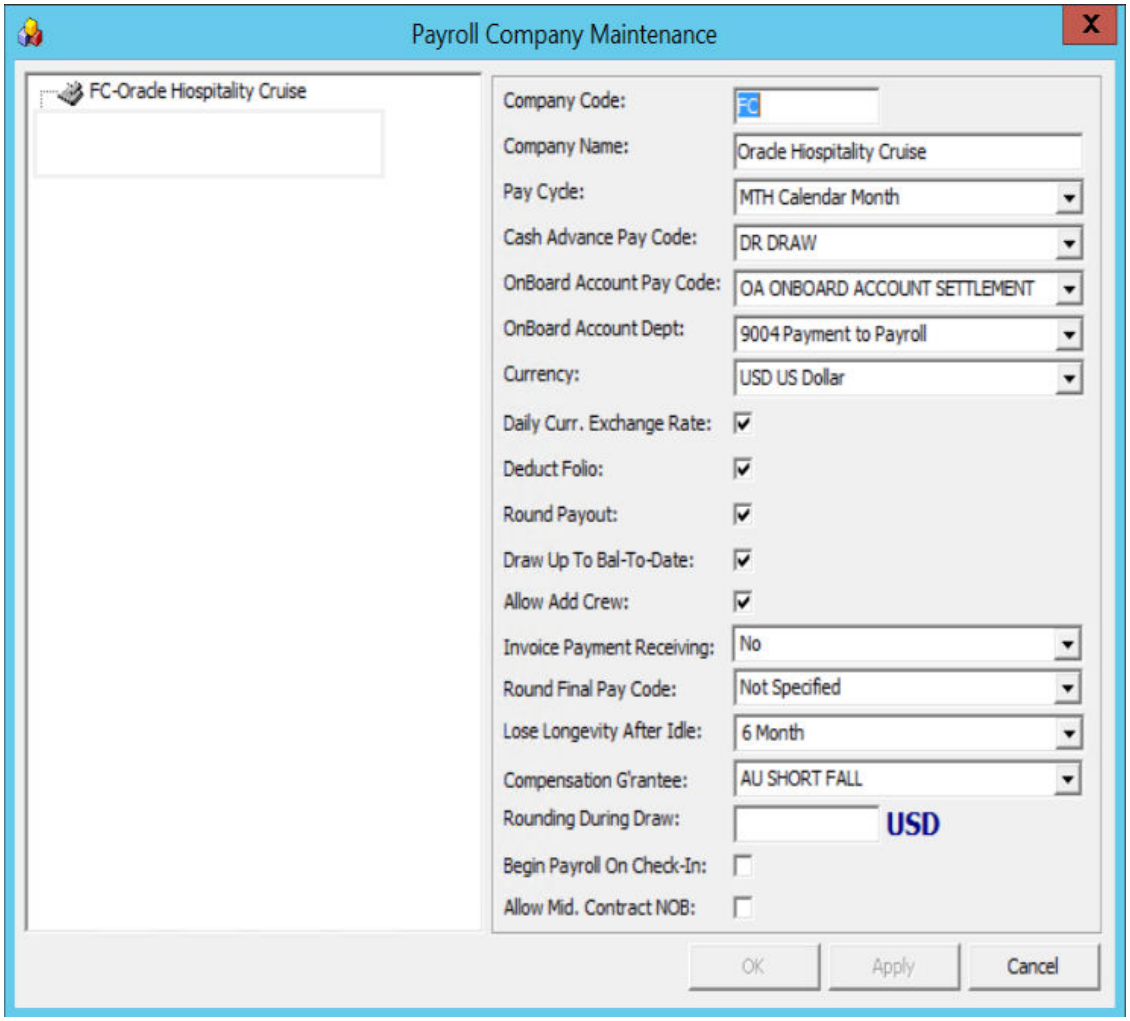


Table 26-13 Field Description of Payroll Company

Field	Description
Company Code	A short code name for the company that will appear in the status bar.
Company Name	The full name for this company.

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Table 26-13 (Cont.) Field Description of Payroll Company

Field	Description
Pay Cycle	The frequency of the payroll. The pay cycles currently supported by the system includes: • 115 – First and Fifteenth: A payout is processed on the first and fifteenth of each month (F). • M30 – 30 Day Month: A payout is processed at the end of each month, but all months are processed as if they have 30 days in them. • BWK – Bi-Weekly: A payout occurs every two (2) weeks (14 days). • MTH - Calendar Month A payout occurs at the end of each month, but each month has the normal number of days. • WEK – Weekly A payout is processed every seven (7) days.
Cash Advance Pay code	The pay code used for recording crew member cash advances.
Onboard Account Pay code	The pay code used for recording payments against a crew member's onboard account or folio.
Onboard Account Dept	The SPMS department number used when posting onboard account payoffs and for balancing between the Payroll module and the SPMS.
Currency	The currency used for this company. The value must be in the TYP_CUR view. A currency department must exist for that currency in the SPMS DEP table.
Daily Currency Exchange Rate	Works with the daily Currency Exchange Rate. If deselected, this uses the normal currency setup in table CUR.
Deduct Folio	Works with the parameter '**Folio Posting** = **Y**'. If the option is selected, the **'Include Onboard Expenses'** checkbox in the crew contract is selected by default.
Round Payout	Pays whole units of payout amounts to crew at end of pay period. **Note:** Decimal adjustment refers to the **Rounding** setting.
Draw Up to Bal-To-Date	If the field is selected, the crew member can only withdraw up to **Bal To Date Amount** of the current pay period. If deselected, the crew member can withdraw up to balance of the monthly amount. **Note:** This is also known as Mid-Month Cash Advance

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Table 26-13 (Cont.) Field Description of Payroll Company

Field	Description
Allow Add Crew	If this field is selected, you can add the crew members tag with “Other” through the payroll system. If deselected only the crew members set up through the SPMS Crew module is allowed.
Invoice Payment Receiving	Used for folio payment transfer from OHC Crew pay invoice into payroll system.
Round Final Pay Code	Works with the **Round Payout** option. The Pay code holds the fractional units at end of the contract. **Note:** To disable rounding on final payout, select **‘Not Specified’** and uncheck the **Round Payout** option.
Lose Longevity After Idle	Option to forfeit crew member longevity bonus after crew contract has been idle *x* months. Program checks this setting when creating a second (or next) contract for the crew member.
Compensation Guarantee	Uses the Pay code COH_COMP_SO_FAR field name to calculate
Rounding	Decimal adjustment. The value indicates that the minimum denomination that the cruise has. Use +/- to round up /down the amount. Entering value ‘0’ disables the rounding function. For example: Value 5 means the smallest onboard currency is $5 and amount is rounded to the next $5. **Note:** If contract currency is different with onboard currency, the rounding refers to **Minimum Denomination** in the **Currency Exchange Rate** setup.
Begin Payroll on Check-In	If enabled, the Payroll record will be insert only to crew members who have a checked-in status except the contract is Not in-on-board status (CTR_NOB = 1) or crew member has an existing assignment.
Allow Mid. Contract NOB:	If enabled, the crew contract will not appear in the Payroll Notification prompt, and inherits the new crew contract instead (CTR_MID_CNTR_NOB).

1. On the **Maintenance** menu, select the Payroll Companies.
2. On the Payroll Company Maintenance form, right-click and select **Add**.
3. Complete the company setup form and click **Apply** to save and keep the form open or click **OK** to save and close the form.
4. Once the company is setup, you can select the company from the selection. You can only update or adjust crew members whose contract is within the selected pay company.

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Cashless Payroll – Ocean Pay

In SPMS, the Cashless Payroll Transfer feature allows the crew to enroll in certain payroll deductions to be paid to a Visa, Master Card or debit card, and the card is directly printed onboard.

OceanPay Format

In order to use the Cashless Payroll feature, you must enable the parameters under the Payroll Group.

Table 26-14 Ocean Pay Parameters

PAR Name	PAR Value	Description
Cashless Payroll Option	0	0 = Ocean Pay 1 = Salary@Sea
OceanPay File Output Folder	\\[shared network folder]\transfer	Folder path to save the output file when generating card order for cashless payroll. You may need to specify the folder in a network path for security purposes.
OceanPay MT Prefix Nbr	54	Defaults prefix number for MT Card. Populated in Cashless Payroll setup
OceanPay VISA Prefix Nbr	45	Defaults prefix number for VISA Card. Populated in Cashless Payroll setup
Pay codes For OceanPay Top-Up Transactions		Value of SED_NO. Pay code for payroll deduction pay codes that will be transferred into the payments file when transactions are posted. Stores multiple SED_NO with Comma Delimited (,).
Stock Code For OceanPay MT		Default Stock Code for MT Card. Populate in Cashless Payroll setup.

Configuring Ocean Pay Standard Parameter

On the General tab of the Standard Parameter Configuration, enter the information in all the mandatory fields.

Before you begin using the Cashless Payroll option, you must set up the basic configuration in the Cashless Payroll menu.

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Figure 26-44 Cashless Payroll Standard Parameter Configuration

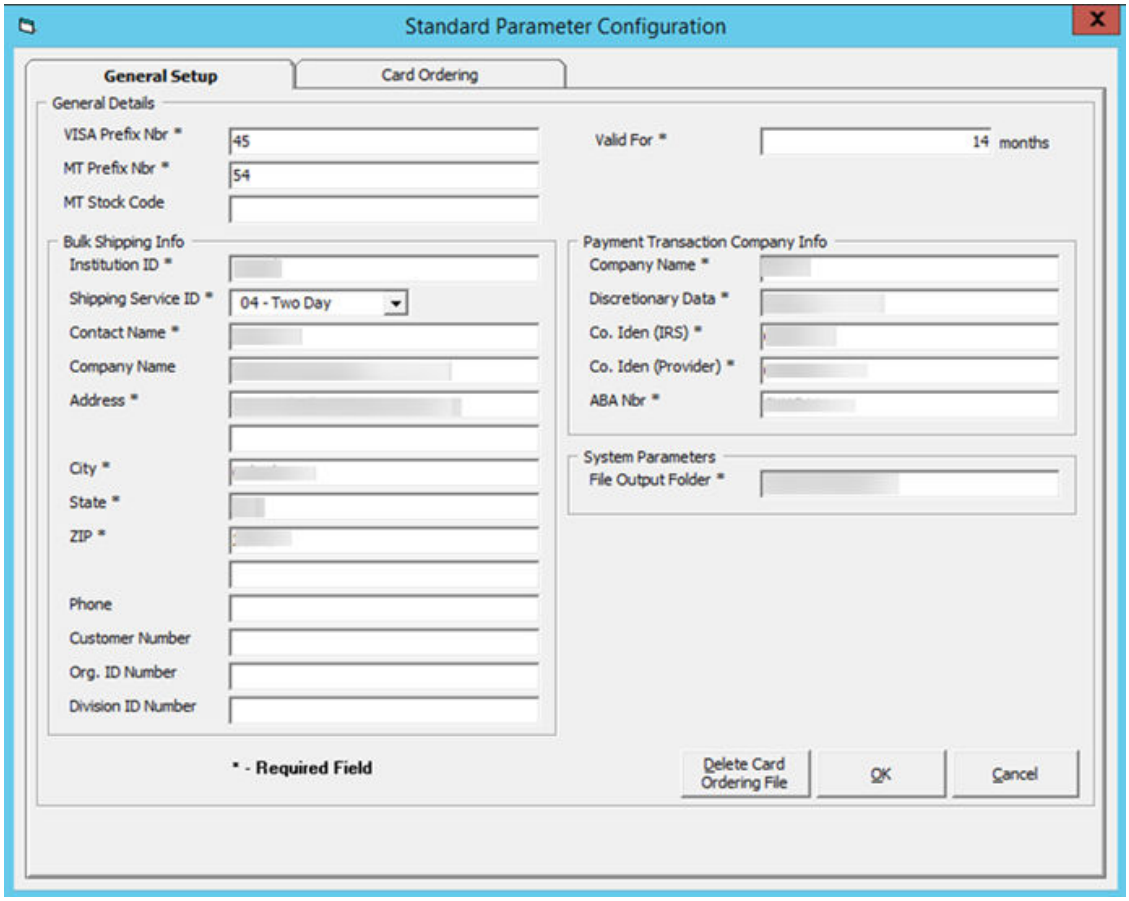


Table 26-15 Cashless Payroll Parameter Field Definition

Field	Definition
General Detail	
VISA Prefix Nbr	Prefix number for VISA card. Default value is specified in parameter “OceanPay VISA Prefix Nbr.”.
MT Prefix Nbr	Prefix number for Master card. Default value is specified in parameter “OceanPay MT Prefix Nbr.”.
MT Stock Code	Card stock code for Master card. Default value is specified in parameter “Stock Code For OceanPay MT.”.
Bulk Shipping Info	
Institution ID	Institution Identification ID.

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Table 26-15 (Cont.) Cashless Payroll Parameter Field Definition

Field	Definition
Shipping Service ID	Shipping Service ID. • 00 – No used • 01 – First Overnight • 02 – Priority Overnight • 03 – Standard Overnight • 04 – Two Days • 05 – Express Saver
Contact Name	Contact name.
Company Name	Company name.
Address	Street address.
City	Address city.
State	Address state.
ZIP	Address zip code.
Phone	Contact phone.
Customer Number	Customer ID.
Org.ID Number	Organization ID number.
Division ID Number	Division ID number.
Payment Transaction Company Info	
Company Name	Company name.
Discretionary Data	Company Discretionary Data.
Co. Iden (IRS)	Company Identification. IRS Employer Identification number.
Co. Iden (Provider)	Company ID as specified by provider.
ABA Nbr	ABA number.
System Parameter	
File Output Folder	Output file location when generating GL file. Default location is specified in parameter "**OceanPay File Output Folder"**. The directory for storing the file needs to be under a network path for security purposes

PGP Encryption

See *OHC Tools User Guide* on the PGP Encryption process in the Oracle Help Center.

Deleting Card Ordering File

In order to protect the data from being comprised, the **Delete Card Ordering File** button is used to remove the unused, expired requests or files sent to PGP. For the delete function to work, this would require the **SDelete** component to be installed.

1. Unzip the **SDelete.zip** into the same directory of Oracle Hospitality Cruise program folder.
2. Click the **Delete Card Ordering File** button at the **General** tab.
3. Click the **Open File** button to browse for the file.

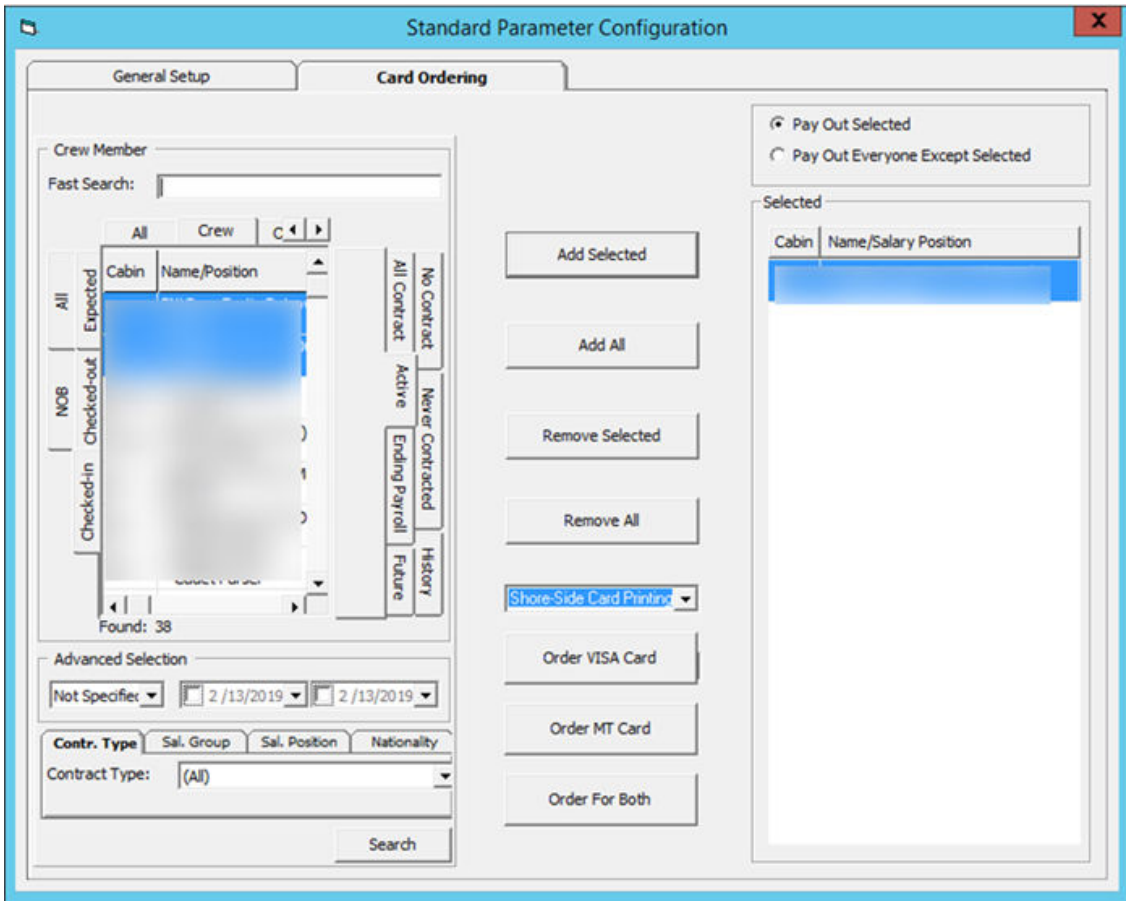
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4. Click **Delete** to completely remove the data file.

Card Ordering

The Card Ordering tab enables you to create a card request file for submission to the bank. The screen shows all the crew members onboard and you can either select by embarkation or debarkation date.

Figure 26-45 Card Ordering Selection



To place the card order for the crew member,

1. Select the crew member from the grid.
2. Click **Add Selected** or **Add All**. You can also deselect them from the grid on the left and then click **Remove Selected** or **Remove All**.
3. Select the card type to print. You can choose to print the debit card onboard or at shoreside using the system provided by Ocean Pay.
4. Click the **Order XXXX** button to place the order.
5. If the crew has ordered a card or the card is not due to expire, the system prompts if you wish to continue to move the name to the selected column. Select the corresponding option.
6. The system creates three separate files containing the same information:

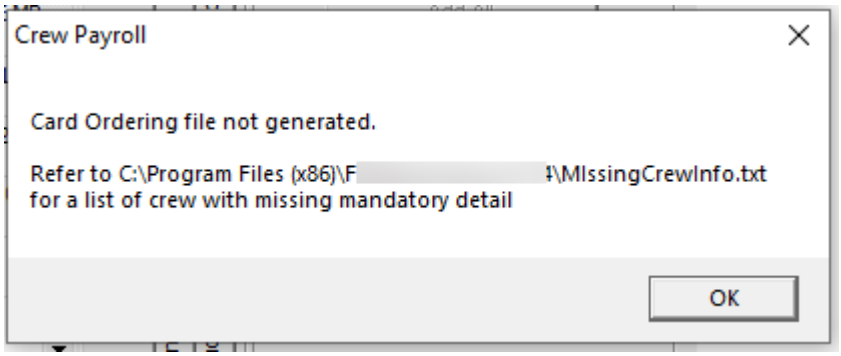
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- **Order Visa Card:** This uses the specific VISA prefix file format.
- **Order MT Card:** This uses the specific MT Card Prefix file format.

> **Note**
>
> You are not allowed to generate the card ordering file without first specifying the encryption key.

The program validates all the required information written to the file of each crew member. The mandatory fields are: Address, Street, City, State, Country and Zip code. An exception log file is created in the Oracle Hospitality Cruise folder for records that do not have the mandatory information.

Figure 26-46 Card Ordering File Not Generated



The following process takes place when the Card Ordering file is generated:

- It saves the generated PGP Encrypted file into the network path specified and uses the following naming convention “`ship name`” + “`MMDDYYYY`”+ “_” + “`unique number`”. For example: *Demo12082009_180237.pgp*
- Older files are automatically moved into the History folder for audit purposes. The files can be deleted using the **Delete Card Ordering File**.
- The program does not allow a crew member to place the card ordering twice. The card ordering will not add the request into the card request file.
- All generated records are stored in the CPT table.

Below is an example of an encrypted output file.

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Figure 26-47 Encrypted Output File



```
-----BEGIN PGP MESSAGE-----
Version: EldoS PGPBlackbox (ActiveX edition)

wYwDTbyGVApe4UUBBACUyuwjzZqXPHfwrfe5f1xm8gV81FZQKxpEtjfZ1/TROtgL
LVXvIFN1uZAOavK5jflHLK29W1G1qKCkFOgky2wLQ0X5aNsuQudYn2k0GAertlJt
GAYNoXTstRzVlNafk35CHy2ubtDVWOQZb7xRdKsFYsKJSz79qVDoYBk8dZY3KMGM
Axj5v0rttgrkAQQAkswM1wnANiDDe0pHawd1tJZ8tMmDPPORm23ctd51ppmgNG6h
vvvRVN7USMqlh1V+X7EYRFIFrSsRHMEyOleiWcnkvJcfaKgH4VgctgUQsyGbU/f4
Z/xNVEa2T/Z+MCAwMrXmuf3vLfx1O5ofjEbKNBM1shtzCZRYHr29i99kPHPJ7Qc7
5f3tb0F5c9Uj951ijYLXTOF3pBiCXPvxUn8vfRVuKUDZN9ogmLgkzVR7APdJ09Fk
hR185ogVT1edwmUoiAwpDaZKI5gqDHOHDh6HtH7cfmI4n9Ay49eV8YiOW9aonDVp
xIfFHFb4N0ocvItFMJ688xdtTYCJ6a/EohtiFi0r27x9akNUSdGWKIdEeYJxzD38
MorJlfGcvfDouj3beUrs8tSO9dXidcFSr8vZ3qoYqFmjUg+bNBKkZKAxQubjEgwB
+O+MuYWVdlt3ErIi7BZACqctHYYvpRsX+kfItzH6nEFpvGCG6LhWxLcdeCDO4Wki
JD7TdJOqER/oGpB5jSmIZlz8mADkHZxcBTxx575kuZgscuHHbFc1KrtKcZOBjORE
Z7twIuvbXY+Clzu3Gs99lby/A9K/aDBdudsunZzRkPs+l1MBK7n1lTy9lV3/4Q8d
dNrwYNQJHLw+9dUaJ/C7vuYmhSgX6iTOL+3buf6zsJEttElo7cBeIZDg+XqAW3AZ
SJE7kMP9A6K6erAXbIM0YeNKNVsMUmZEXsRX8A32pj7mHspJeUb33aV3FHMaAP6k
rvLGgT7903d37KGH/dfWilevG5Jf7Q0ClVWiiYrcdobhlZnKZ9+WTrurBHPx4C+5
NOrz9oxbbVAO1uaylaktNDtNYhYK8aLaHofbit94nm5ktivh3K+AsPNtgQOH0BsI
NsbG9SU2qSoNpvamWHRNbjrhliLfiDqPpH04vW5DLjiP7ZOJvTZ5NiFTbRBV0QJt
gtEuOKCCzPdhbpNVHz66GfPUVQL14XlORkkOZBm0C7RsApdDwrqZ2YDm/v1ZMflZ
```

Salary at Sea Format

The Salary@Sea format is another cashless payroll functionality. To use this function, you must set up the following in the **Administration** and **Payroll** module:

- Pay code Type.
- Pay code.
- Cashless Payroll Standard Parameter Configuration.
- Database Parameter listed in below table.

In the Pay code setup, ensure these are configured:

- Pay code Type setup:
  - Pay code Type ID: PC.
  - Pay code Type description: Cashless Payroll.
  - Enabled: Checked.
- Pay code Setup:
  - Pay code ID: 0150.
  - Sort order: 150.
  - Pay code description : Salary@Sea.
  - Pay code type : PC Cashless Payroll.
  - Status : Active.
  - Calc Method : P-FLAT Flat Amount.
  - Apply Order : 150.

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See Setting up Payroll Codes on how to configure a pay code.

Table 26-16 Salary@Sea Parameters

PAR Name	PAR Value	Description
Salary@Sea File Output Folder	<network path>	For security purposes, the path defined must be a network path.
Cashless Payroll Option	0	0 = Ocean Pay 1 = Salary@Sea
Cashless Payroll Pay code Type		Pre-configured Pay code Type in Payroll module.

Configuring Salary at Sea Standard Parameter

In the Cashless Payroll menu, General tab, enter the value per the table below:

Figure 26-48 Cashless Payroll - Salary @Sea

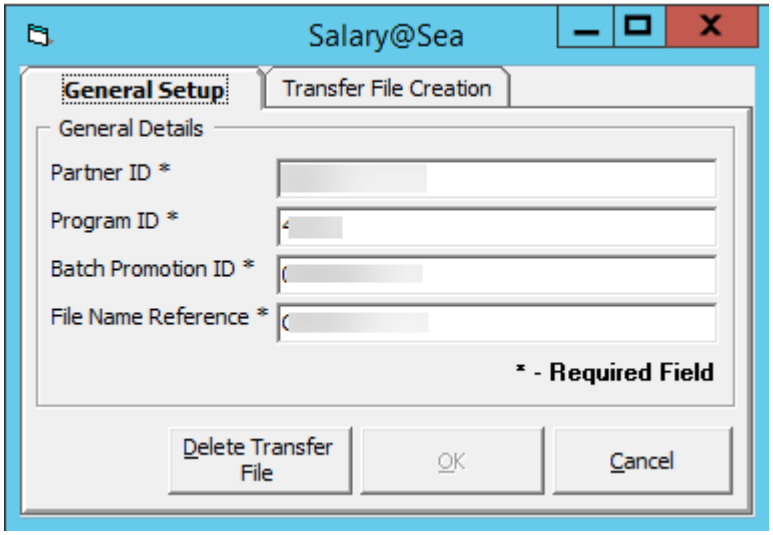


Table 26-17 Salary@Sea Field Definition

Setup	Value	Remarks
Partner ID	0043	Default value will be set to 0043.
Program ID	4322	Default value will be set to 4322.
Batch Promotion ID	000000xx	xx = refer to ship id.
File Name Reference	Citibank	Default value will be set to Citibank.

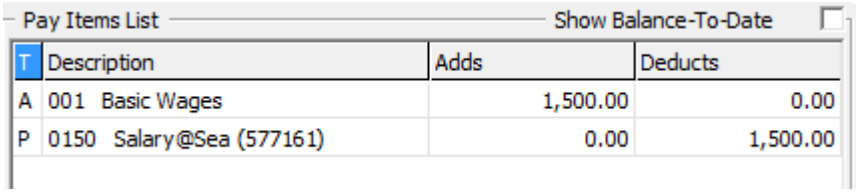
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Generating a File

Once you have all the parameters in place, you can then generate the file from the Cashless Payroll menu, Transfer File Creation function.

1. Open the Cashless Payroll menu and navigate to the **Transfer File Creation** tab.
2. Select the **Pay Period** from the drop-down list.
3. You can receive multiple confirmation prompts depending on the records that are being processed. Read through each pop-up message and then click **OK** to continue.
4. Once the file is generated, the PAY_ID appears with Salary@Sea Pay code in the pay item list, as shown in the diagram below.

Figure 26-49 Pay ID in Pay Items List



Below, there are sample transfer files for single, multiple and voided Salary@Sea transactions.

Figure 26-50 Single Salary@Sea Transaction

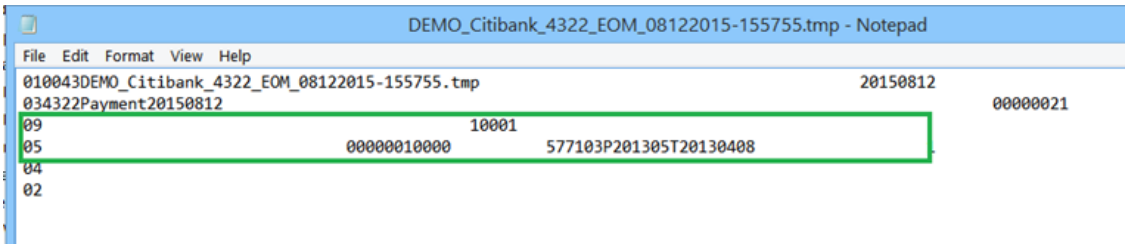
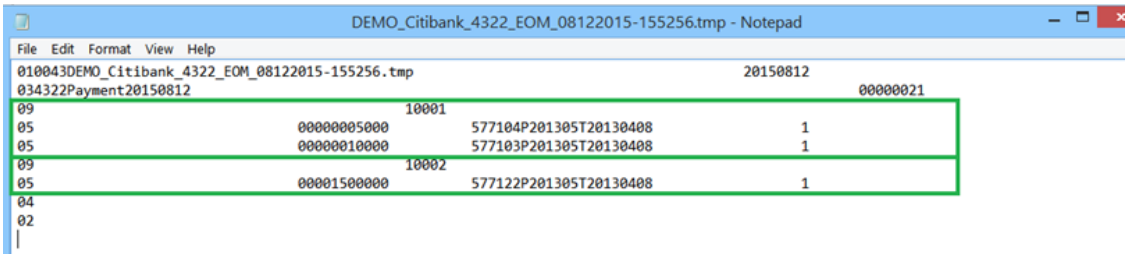
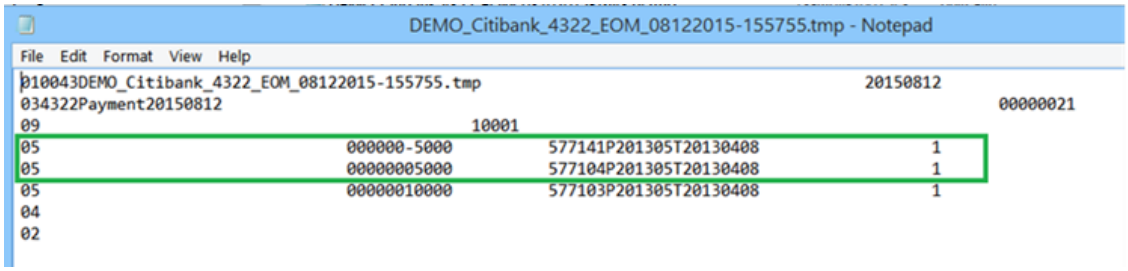


Figure 26-51 Multiple Salary@Sea Transactions



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Figure 26-52 Voided Salary@Sea Transaction



File Transfer Specification

The file name generated by Salary@Sea in a 'tmp' file format is saved in the following format; `<ShipName>_<FileNameReference>_<ProgramID>_EOM_MMDDYYYY-HHMMSS.tmp`

Transfer File layout

Each of the transfer file types has a specific header and layout format, as described in the following tables.

Table 26-18 Header Code/ Report Type

Header code/ report type	Description
01	File Header Record
03	Batch Header Record
09	Request Record
05	Add Funds Action
04	Batch Footer Record
02	File Footer Record

Figure 26-53 Sample Transfer File

```
010043DEMO_Citibank_4322_EOM_08122015-101642.tmp
20150812
034322Payment20150812
00000021
09                                  10001
05                          00000005000         577104P201305T20130408
1
05                          00000010000         577103P201305T20130408
1
09                                  10002
05                          00001500000         577122P201305T20130408
1
```


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Table 26-19 Layout Specification — Header code/ report type: 01

Field Name	Position	Length	Type	Comment	SPMS Mapping
Record Type	1 – 2	2	Numeric	“01”	Hardcode to 01.
Partner ID	3 – 6	4	Numeric	“0043”	Refer to Partner ID configured/ specified in Payroll, Cashless Setup.
File Name	7 – 56	50	Character	Unique name for each transfer file	<ShipName>_<FileNameReference>_<ProgramID>_EOM_MMDDYYYY-HHMMSS.tmp
Pass through	57 – 88	57	Character	Client can use this field in whatever manner they choose. It will be passed backed in the reply file.	Remain empty for now since response files are out of scope at this point.
Creation date	89 – 96	8	Date	Date the file was created	Date format: YYYYMMDD.

Table 26-20 Layout Specification — Header code/ report type: 03

Field Name	Position	Length	Type	Comment	SPMS Mapping
Record Type	1 – 2	2	Numeric	“03”	Hardcode to 03.
Program ID	3 – 6	4	Numeric	“4322”	Refer to Program ID configured/ specified in Payroll > Cashless Setup.
Batch description	7 – 70	64	Character	Payment memo will appear on recipient’s statement	Format: PaymentYYYYMMDD YYYYMMDD is computer date.
Pass through	71 – 102	32	Character	<Blank>	Remain empty.
Batch promotion ID	103 – 110	8	Numeric	‘00000021’	Refer to Promotion ID configured/ specified in Payroll, Cashless Setup.

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Table 26-20 (Cont.) Layout Specification — Header code/ report type: 03

Field Name	Position	Length	Type	Comment	SPMS Mapping
Settlement Date	111 – 118	8	Date	<Blank>	Remain empty as required.

Table 26-21 Layout Specification — Header code/ report type: 09

Field Name	Position	Length	Type	Comment	SPMS Mapping
Record Type	1 – 2	2	Numeric	“09”	Hardcoded to 09.
Partner user id	3 – 52	50	Character	Unique account identifier (Crew ID)	Refer to crew’s external ID (UXP_C_EXTERNALID).
Pass through	53 – 84	32	Character		Remain empty.

Table 26-22 Layout Specification — Header code/ report type: 05

Field Name	Position	Length	Type	Comment	SPMS Mapping
Record Type	1 – 2	2	Numeric	“05”	Hard code to 05.
Pass Through	3 – 34	32	Character		Remain empty.
Amount	35 – 44	10	Currency	Amount $35.57 is display as ‘3557’	PAY_AMOUNT
Taxable Flag	45 – 45	1	Numeric	‘0’	Hard coded to 0.
Notification Indicator	46 - 55	10	Numeric	<BLANK>	Remain empty.
Partner payment id	56 – 95	40	Character	Prevent payment duplication <PayID>P<PayPeriod>T<SignonDate>	<PayID>P<PayPeriod>T<SignonDate> <Pay_ID>P<SPP_NAME>T<RES_EMB_A> For example, 577104P201305T20130408.
Direct/Claim Flag	96 – 96	1	Numeric	1 – standard payroll 0 – off cycle payroll	Hard coded to 1.
Imported record ID	97 – 104	8	Character	<BLANK>	Remain empty.

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Table 26-23 Layout specification — Header code/ report type: 04

Field Name	Position	Length	Type	Comment	SPMS Mapping
Record Type	1 – 2	2	Numeric	“04”	Hardcode to 04.

Table 26-24 Layout specification — Header code/ report type: 02

Field Name	Position	Length	Type	Comment	SPMS Mapping
Record Type	1 – 2	2	Numeric	“02”	Hard coded to 02.

Event Log

The system logs all transfer files created into the Log table with LOG_KEY as *“SalSea”* and LOG_NOTES with “*Start writing…”* and *“Finish writing …”*

Payroll Benefit Administration

In addition to the generic payroll, the Payroll Benefit feature allows you to manage the Nordben Pension Plan (410K) and the British United Provident Association (BUPA) Medical Plan. The setup of the pay codes is relatively similar to the generic Payroll module, with additional requirements and this is described in the following sections.

To use this feature, you must:

- Configure the calculation Pay codes for contributions/deductions for both the employee and employer.
- Ensure you associate the correct Code Type and Calculation Method to the pay codes.

Configuring Benefits Codes

Pay Deductions

A pay deduction code is required for crew contributions to a pension or medical plan under the Pay Deductions code, and this pay code will reflect on the crew pay sheet.

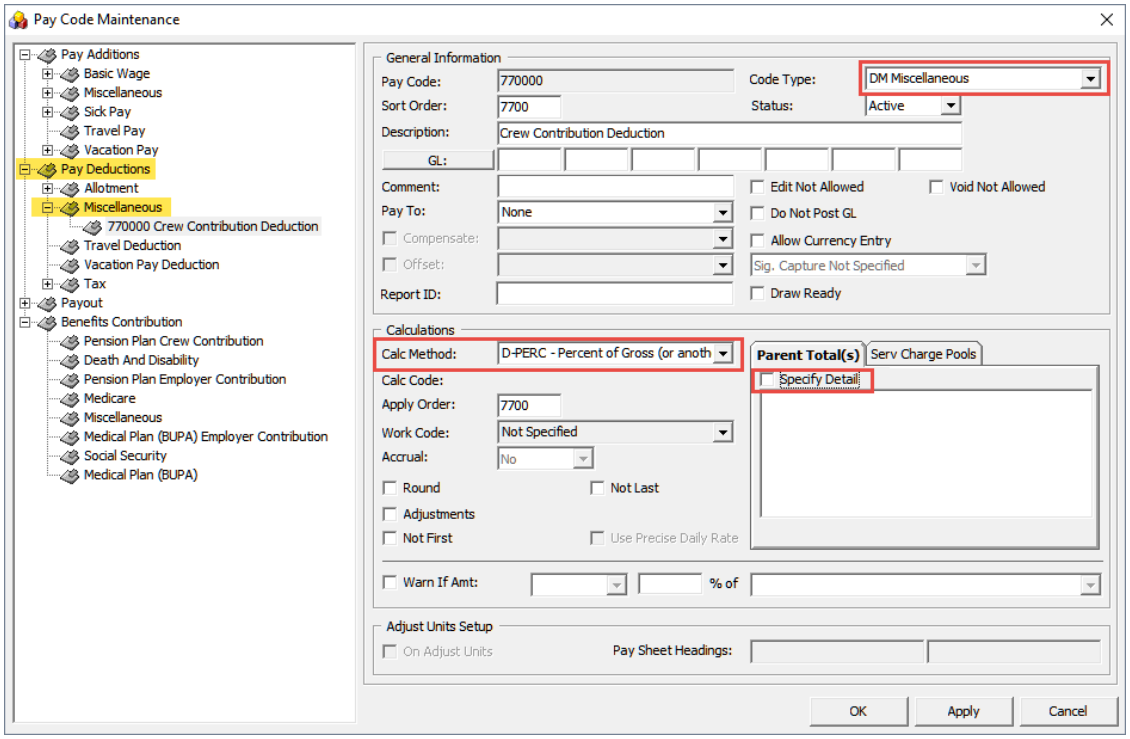
The new pay deduction codes are added as a sub-code of a Pay Deductions – **Miscellaneous** code type. For the setup of the pay codes, see chapter Creating a Code Type.

When creating the pay codes, you *must* ensure the following is correctly set up in each of the categories:

Setting up Crew Contribution Deductions - Miscellaneous and Medical Plan

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Figure 26-54 Benefit Pay code Maintenance



- Unique Pay Code ID.
- Code Type = DM Miscellaneous.
- Pay Code Description. For example, Medical Plan or Crew Contribution Deduction.
- Sort Order. This can be the same as Pay Code ID.
- Calculation Method = D-PERC Percent of Gross (or another amount).
- Apply Order. This can be the same as Pay Code ID.
- Check the Do Not Post GL if you do not wish to show the pay code in the GL file.

> **Warning**
>
> Once the D-PERC Percent of Gross (or another amount) calculation method is selected, the **Specify Detail** checkbox becomes visible. You *must* select the Pension Plan or Medical Plan BUPA pay codes in Benefit Contribution – Crew Pension Plan Contribution in order to get the 100 percent offset value of the specified pay code.

Offset Benefits Contributions - Miscellaneous

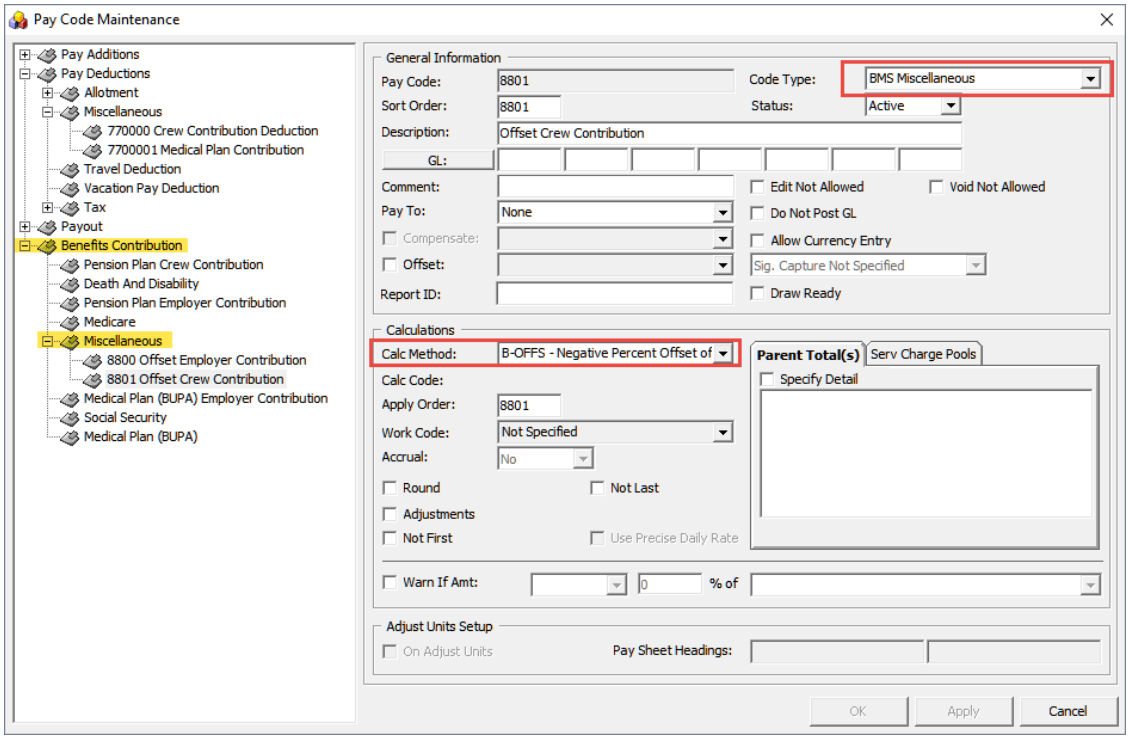
The Offset Crew Contribution or Offset Employer Contribution pay code is used to automatically balance the benefit postings during payroll paid outs at the end of the month. You may create more than one offset pay code and assign it to a different benefits contribution pay code.

The Offset Crew Contribution pay is added as a sub entry in **Benefit Contribution – Miscellaneous**.

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Setting up Offset Miscellaneous Contributions – Crew/Employer Contribution

Figure 26-55 Miscellaneous Contribution Pay Code Maintenance



- Unique Pay Code ID.
- Code Type = BMS Miscellaneous.
- Pay Code Description. For example, Offset Crew Contribution Deduction or Offset Employer Contribution.
- Sort Order. This can be the same as Pay Code ID.
- Calculation Method = B-OFFS Negative Percent Offset of Another Amount.
- Apply Order. This can be the same as Pay Code ID.
- Check the Do Not Post GL if you do not wish to show the pay code in the GL file.

> **Warning**
>
> Once the **B-OFFS Negative Percent Offset of Another Amount** calculation method is selected, the **Specify Detail** checkbox becomes visible. You *must* select all the relevant Crew Contribution pay codes if those pay codes in Payroll Benefit Administration (Pension Plan, Crew Medical Plan Contribution, Employer Contribution, Death and Disability Contribution, Medical Plan (BUPA)) are assigned to offset this pay code. This is to obtain a 100 percent offset value of the specified pay code.

Crew Pension Plan Contribution

In order to differentiate the Pension Plan calculation method for the crew, you need to create two pay code types.

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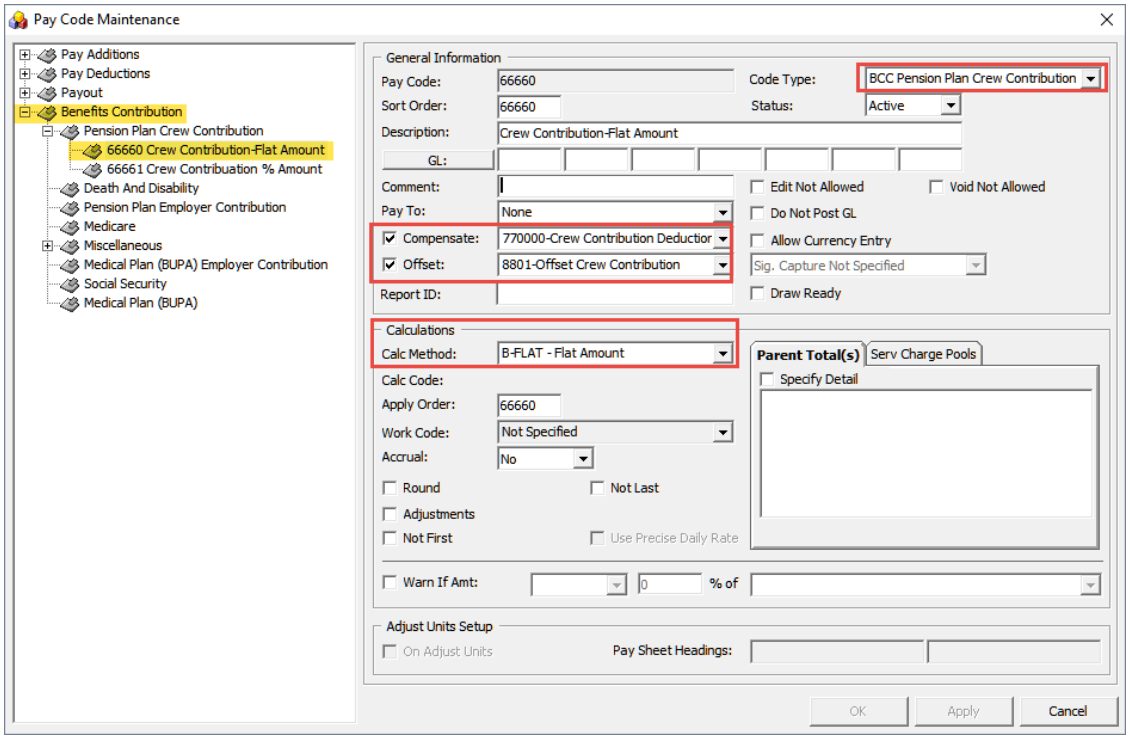
- Crew Contribution by Flat Amount
- Crew Contribution by Percentage

In each of the pay codes, you must ensure that the **Code Type, Compensate, Offset** and, **Calculation Method** are correctly associated as shown in diagrams below.

Crew Contribution by Flat Amount

This pay code enables you to specify an amount for crew to contribute to their pension plan.

Figure 26-56 Flat Amount Contribution



- Unique Pay Code ID.
- Code Type = BCC Pension Plan Crew Contribution.
- Pay Code Description. For example, Crew Contribution Deduction (Flat Amount) or (% Amount).
- GL Code where the contribution deductions are credited.
- Sort Order. This can be the same as Pay Code ID.
- Compensate must be linked to the Crew Contribution Deductions.
- Offset code must be linked to the Offset Crew Contribution.
- Calculation Method = B-FLAT Flat Amount.
- Apply Order. This can be the same as Pay Code ID.
- Check the Do Not Post GL if you do not wish to show the pay code in GL file.

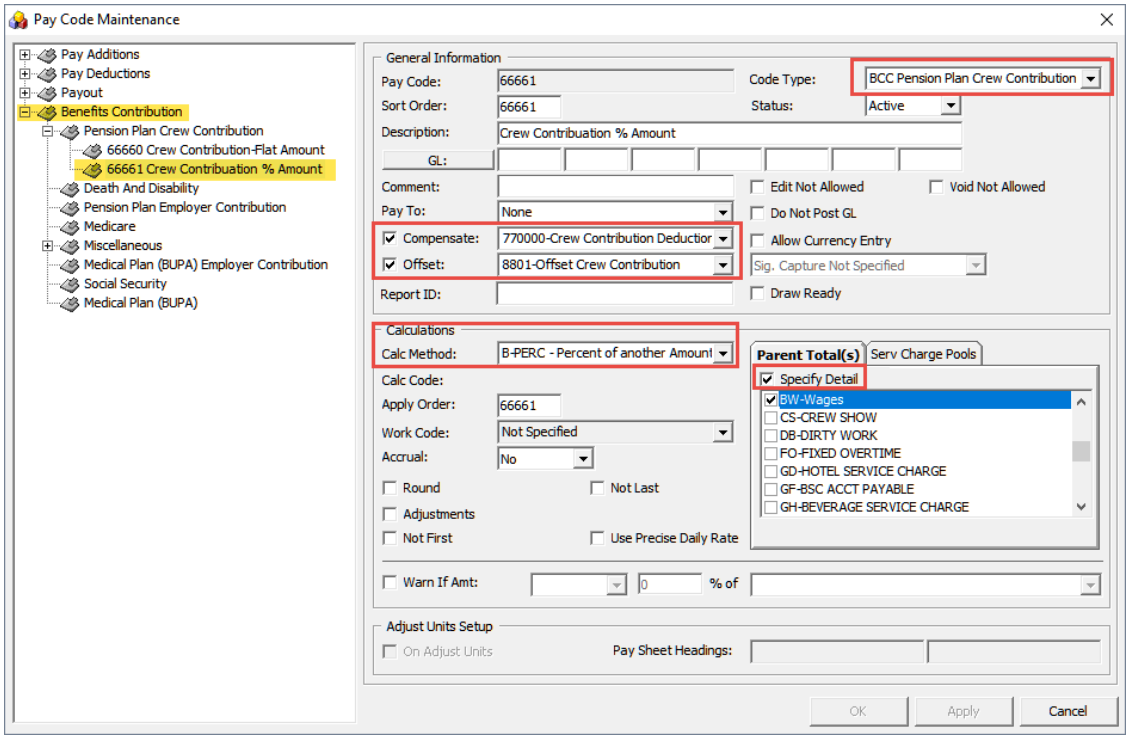
Crew Contribution by Percent Amount

The pay code setup for contribution by percent amount is similar to the By Flat amount, except the following:

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- The Calculation Method is B-PERC – Percent of another amount.
- You must select a base for the system to calculate from the **Parent Total** tab, **Specify Detail** checkbox.

Figure 26-57 Pay Contribution by Percentage

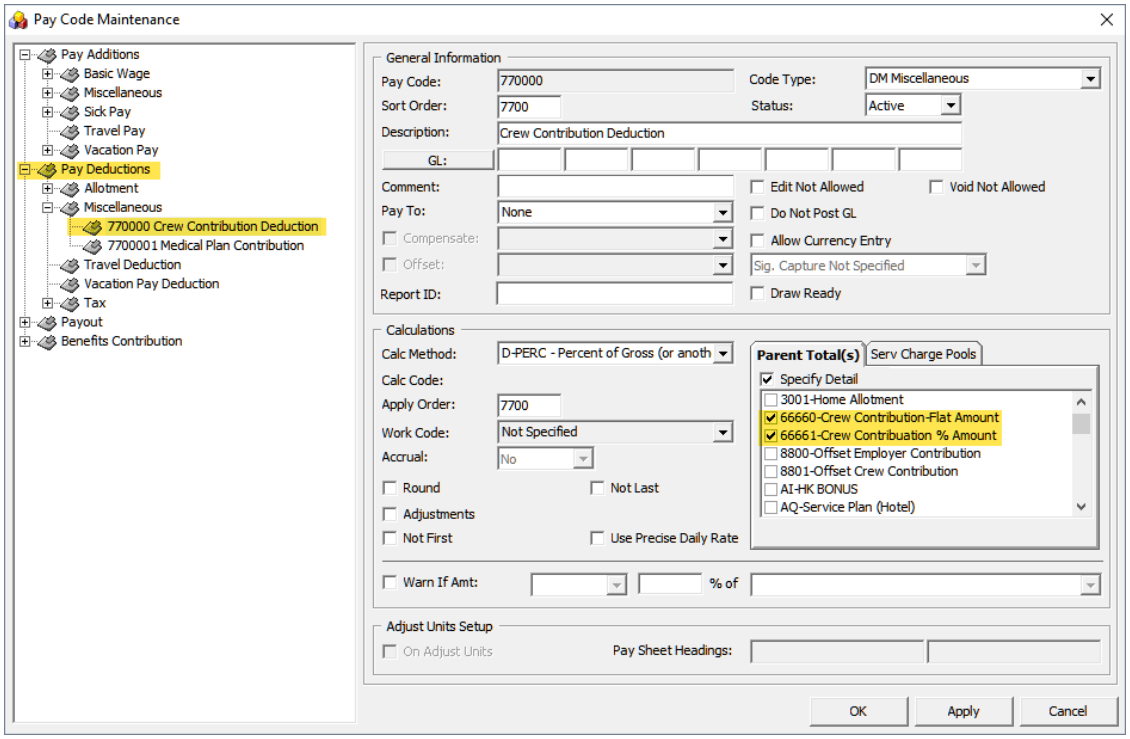


Linking Contribution Pay Codes to Pay Deductions

Once the pay codes are set up, you must link them in the **Pay Deductions** codes.

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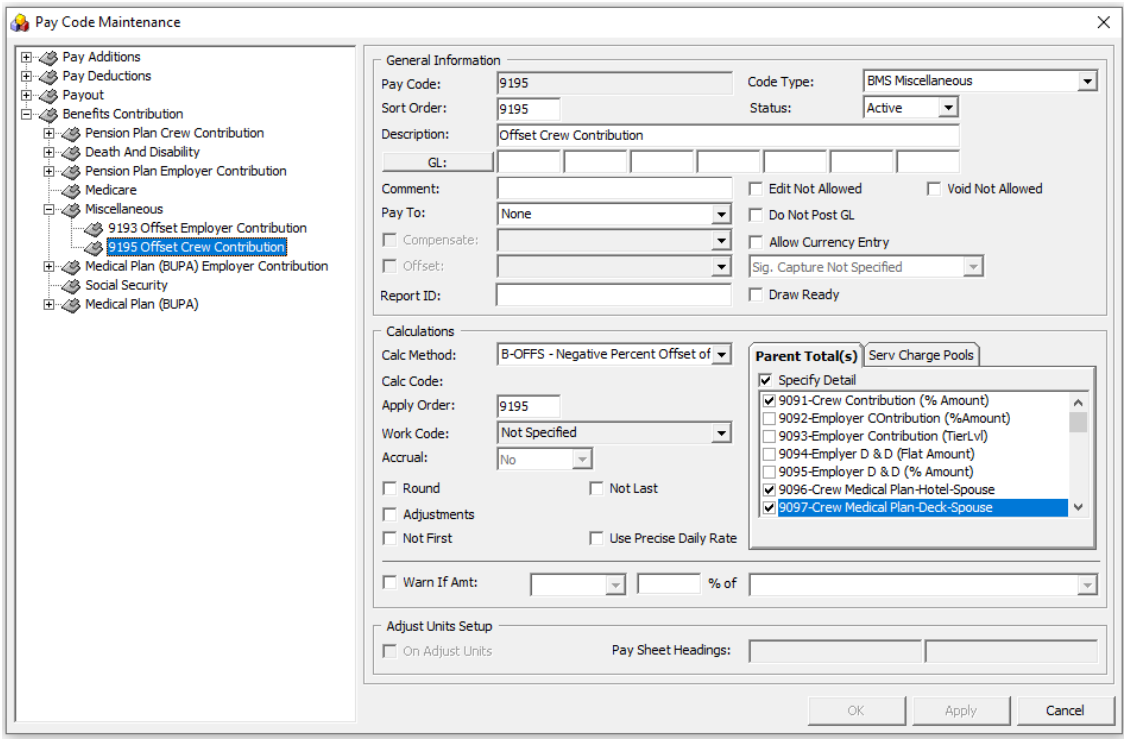
Figure 26-58 Pay Code Maintenance form



1. Navigate back to the **Pay Deductions – Miscellaneous, Crew Contribution Deductions**.
2. Select the Specify Detail checkbox and select both **Contribution Codes**.
3. Click **Apply** to save.
4. If the Pension Plan Crew Contribution pay code is assigned to an offset pay code, navigate back to Benefit Contribution – Miscellaneous, Offset Crew Contribution.
5. Check if they are linked.

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Figure 26-59 Offset Crew Contribution



Employer Pension Plan Contribution

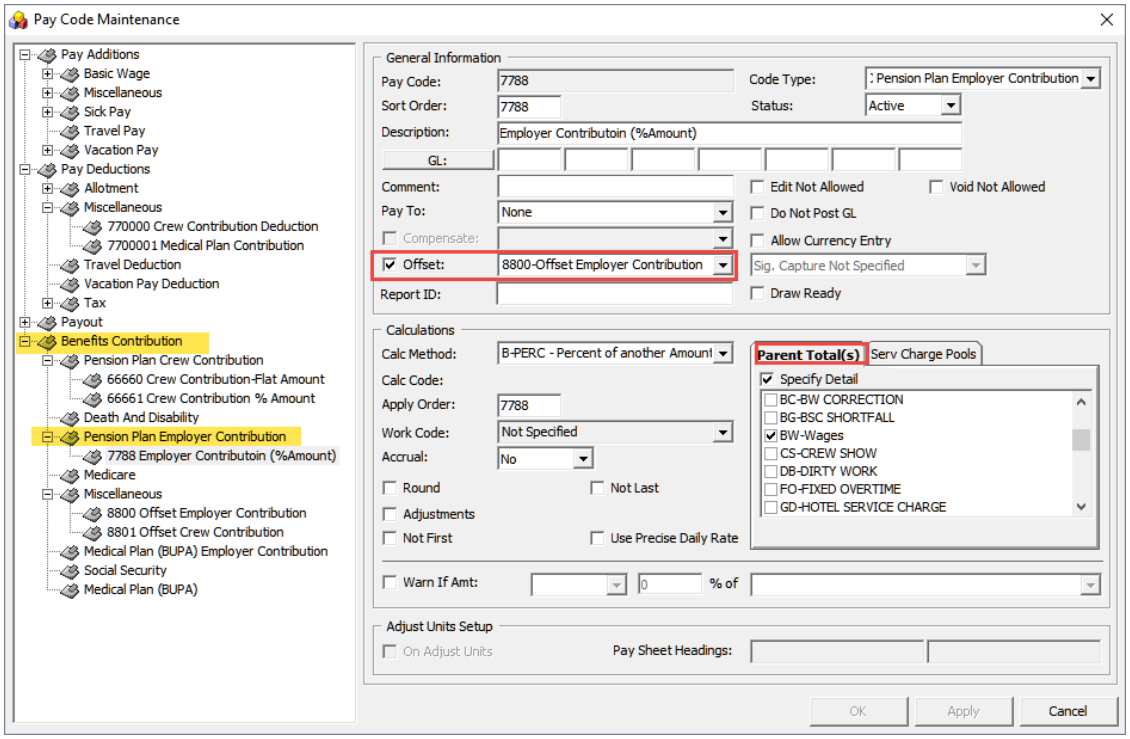
Similar to the Crew Pension Plan, you must set up two contribution codes for an employer.

- Employer Contribution by Percentage
  - This pay code is used for employer contributions by percentage to the crew pension plan, based on the crew's applicable monthly earnings.
- Employer Contribution by Tier Level
  - This pay code is used for employer contribution based on the Tier Level calculation method (100 percent of the first 3 percent and 50 percent of the next 7 percent) based on the crew's contribution on applicable monthly earnings.

Employer Contribution by Percentage

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Figure 26-60 Benefits Contribution for Pension Plan



This pay code is added as a sub entry in **Pension Plan Employer Contribution** and must contain the following:

- Unique Pay Code ID.
- Code Type = BEC Pension Plan Employer Contribution.
- Pay Code Description. For example, Employer Contribution (%Amount).
- GL Code where the employer contribution expenses are credited.
- Sort Order. This can be the same as Pay Code ID.
- Select the Offset pay code if you choose to offset the employer contribution in the pay sheet. The offset pay code refers to Offset Employer Contribution. See Offset Benefits Contribution - Miscellaneous.
- Check the **Do Not Post GL** if you do not wish to show the pay code in GL file.
- Apply Order. This can be the same as Pay Code ID.
- Calculation Method = B-PERC – Percent of another Amount.
- On the Specify Detail page, select the applicable monthly earning pay code. The percentage of Employer Contribution to compensate is based on the selected pay code such as basic wage. The system calculates the employer contribution amount against the crew's monthly salary.

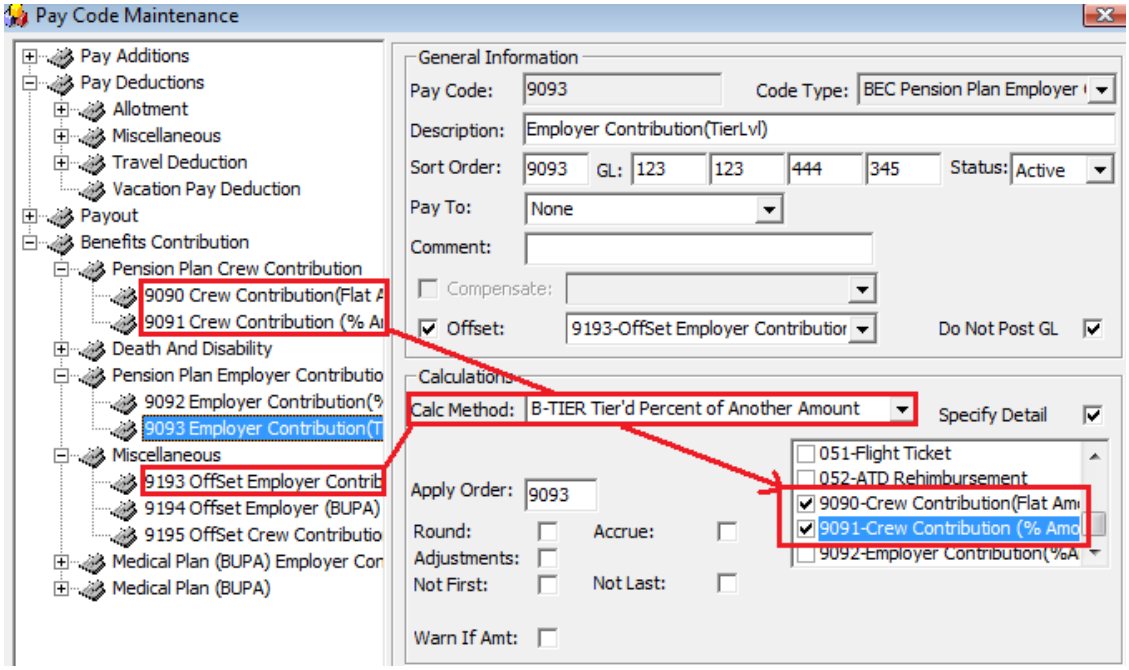
Employer Contribution by Tier Level

The following contribution code is for an employer that contributes using the Tier Level calculation method (100 percent of the first 3 percent and 50 percent of the next 7 percent) of the crew's contribution on applicable month earnings.

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The Calculation Method is **B-TIER – Tiered Percent of another Amount**. Select the **Offset** pay code if you choose to offset the employer contribution in the pay sheet.

Figure 26-61 Employer Contribution by Tier Level



Death and Disability Contributions

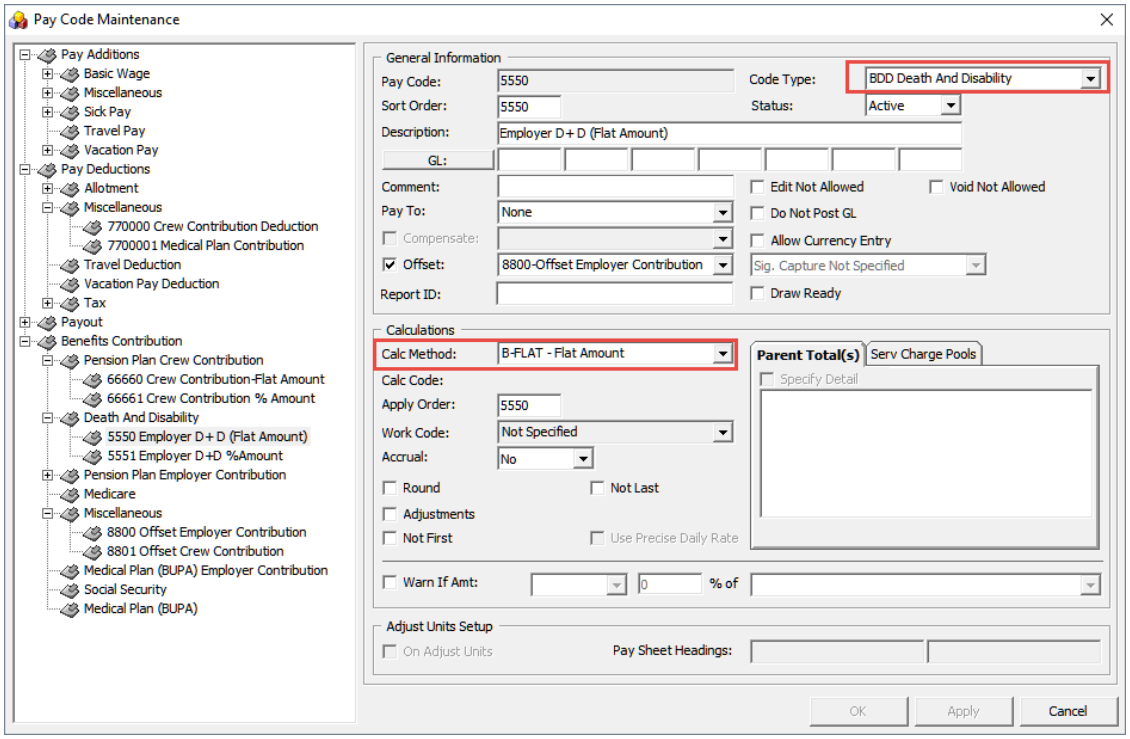
Apart from the Pension Plan, you can contribute to the Death and Disability plan. For this, you need to create two separate codes for the calculation method.

- Death and Disability (Flat Amount)
- Death and Disability (% Amount)

Set up the code just as you would for the other codes.

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Figure 26-62 Death and Disability Contributions



- Unique Pay Code ID
- Code Type = BDD Death And Disability
- Pay Code Description. For example, Employer D + D (Flat Amount).
- GL Code where the employer contribution expenses are credited.
- Sort Order. This can be the same as Pay Code ID
- Select the Offset pay code if you choose to offset the employer contribution in the pay sheet. The offset pay code refers to Offset Employer Contribution. See Offset Benefits Contribution - Miscellaneous.
- Check the **Do Not Post GL** checkbox if you do not wish to show the pay code in the GL file.
- Apply Order. This can be the same as Pay Code ID
- Calculation Method = B-FLAT Flat Amount.

For contribution by Percentage, select:

- Calculation Method = B-PERC Percent of Amount
- On the Specify Detail page, select the applicable monthly earning pay code. The percentage of Employer Contribution to compensate is based on the selected pay code such as basic wage. The system calculates the employer contribution amount against the crew's monthly salary.

Once the Benefit Contribution pay codes have been set up and if the pay code is assigned to an **Offset Employer Contribution**, navigate back to the **Offset** pay code and link all the **Benefit Contribution** codes in the **Specify Detail** window.

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Medical Plan Contribution (BUPA)

The Medical Plan Contribution (BUPA) comprises two contributions: Employer and Employee. An employer is obligated to contribute to the employee Medical Plan. The employee may also choose to contribute for their dependent's medical plan through deductions from their monthly earnings.

Crew Medical Plan Contribution – Hotel Department – Spouse

The Crew Medical Plan contribution is segmented into two categories – Hotel and Deck and Engine. There are eight pay codes for the Medical plan and all contribution amounts are set as flat amount.

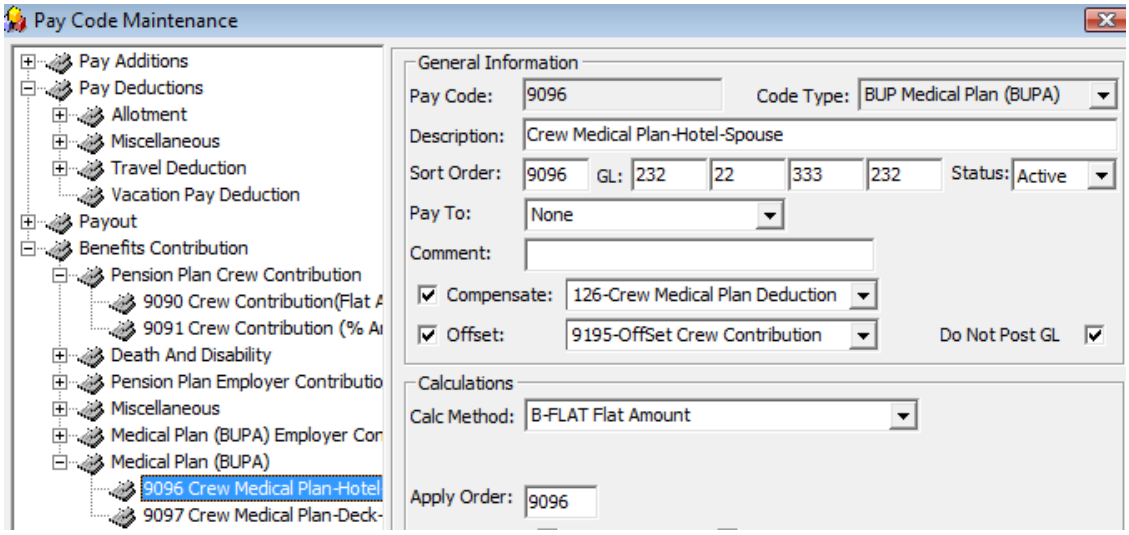
- Crew Medical Plan Contribution – Hotel Department – Spouse
- Crew Medical Plan Contribution – Hotel Department – Spouse and children 21 and under.
- Crew Medical Plan Contribution – Hotel Department – Single and children 21 and under
- Crew Medical Plan Contribution – Hotel Department –children 21 and older
- Crew Medical Plan Contribution – Deck & Engine Department – Spouse
- Crew Medical Plan Contribution – Deck & Engine – Spouse and children 21 and under
- Crew Medical Plan Contribution – Deck & Engine – Single and children 21 and under
- Crew Medical Plan Contribution – Deck & Engine – children 21 and older

The following pay code is setup for the hotel department crew dependent's contribution, as an example and is added to the Medical Plan category. You must create the pay code per the above list, and link them to the **Crew Contribution** and **Offset Crew Contribution** code.

- Unique Pay Code ID.
- Code Type = BUP Medical Plan (BUPA).
- Pay Code Description. For example, Crew Medical Plan-Hotel-Spouse.
- GL Code where the employer contribution expenses are credited.
- Sort Order. This can be the same as Pay Code ID.
- Compensate Pay code must be a Crew Contribution Deduction. This refers to a Pay Deduction. See Pay Deductions.
- Select the Offset pay code if you choose to offset the employer contribution in the pay sheet. The offset pay code refers to the Offset Crew Contribution. See Offset Benefits Contribution - Miscellaneous.
- Check the Do Not Post GL checkbox if you do not wish to show the pay code in the GL file.
- Apply Order. This can be the same as Pay Code ID
- Calculation Method = B-FLAT Flat Amount.

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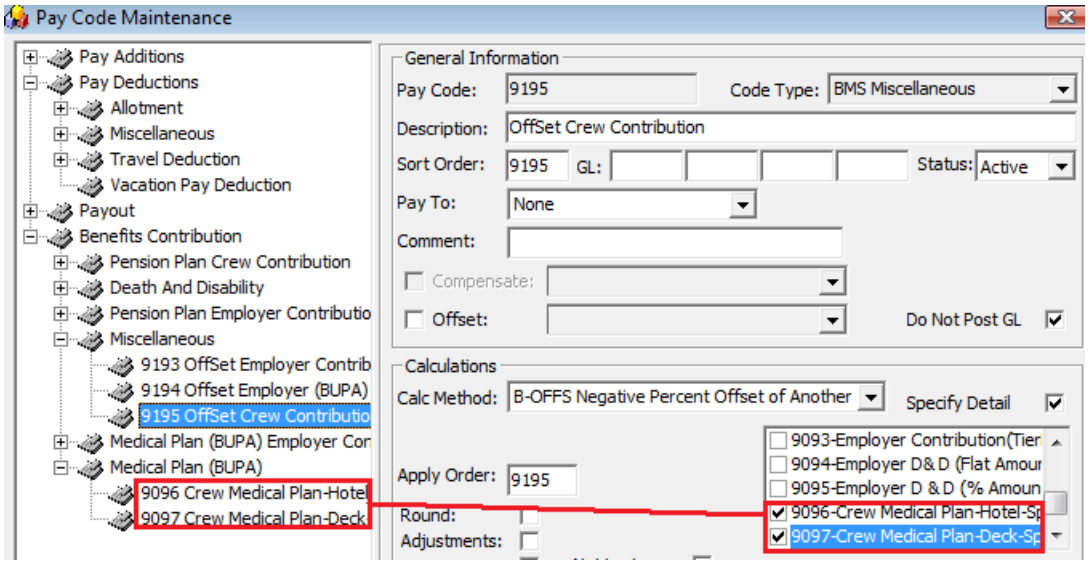
Figure 26-63 Medical Plan Pay Code Maintenance



Once the creation of the above pay code completes:

1. Create the remaining pay codes according to the department and dependent using the same **Compensate** and **Calculation Method**.
2. Navigate back to the **Pay Deduction, Miscellaneous, Crew Medical Plan Deduction**.
3. Select the **Specify Detail** checkbox and select the corresponding **Crew Medial Plan Contribution** pay codes.
4. If the Crew Medical Plan Contribution pay code is assigned to an **Offset Pay code**, navigate back to **Benefit Contribution, Miscellaneous, Offset Crew Contribution**.
5. Check if they are correctly linked.

Figure 26-64 Offset Crew Contribution



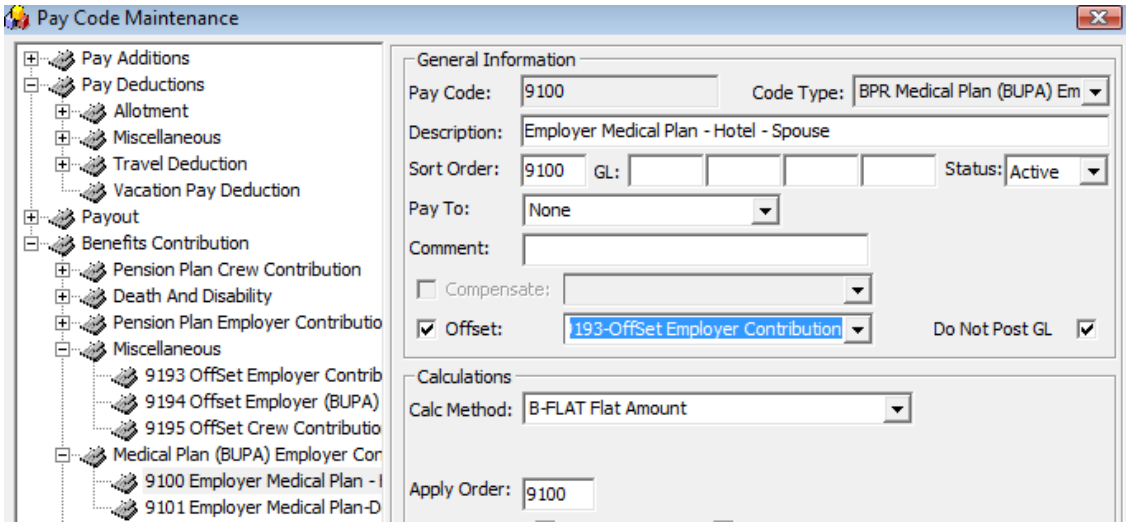
Employer Medical Plan Contribution

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The Medical Plan (BUPA) Employer Contribution is the benefit contribution portion of the employer to the employee. Similarly, they are segmented to two pay codes and use the same calculation method:

- Medical Plan Employer – Hotel Department
- Medical Plan Employer – Deck & Engine Department

Figure 26-65 Employer Medical Plan Contribution



- Unique Pay Code ID
- Code Type = BUP Medical Plan (BUPA)
- Pay Code Description. For example, Employee Medical Plan-Hotel-Spouse.
- GL Code where the employer contribution expenses are credited.
- Sort Order. This can be the same as Pay Code ID
- Select the Offset pay code if you choose to offset the employer contribution in the pay sheet. The offset pay code refers to Offset Employer Contribution. You may create a new Offset pay code to separate the offset value, if preferred. See Offset Benefits Contribution - Miscellaneous.
- Select the **Do Not Post GL** checkbox if you do not wish to show the pay code in GL file.
- Apply Order. This can be the same as Pay Code ID.
- Calculation Method = B-FLAT Flat Amount.

If the pay code is assigned to an Offset Employer Contribution pay code:

1. Navigate back to the Benefit Contribution, Miscellaneous, Offset Employer Contribution section.
2. Check the **Specify Detail** checkbox and select the corresponding **Employer Medical Plan Contribution** pay codes.

Processing Payroll with Benefit Plans

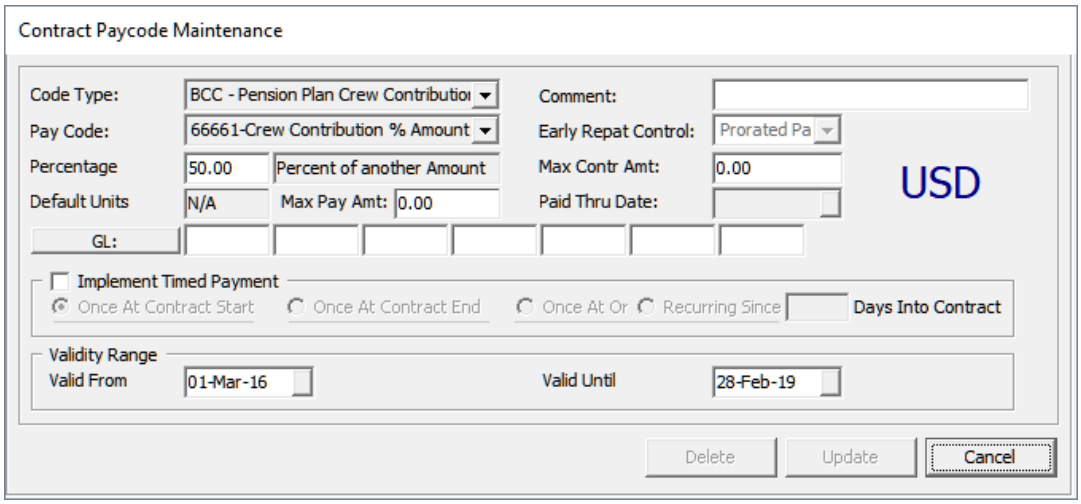
In order for the system to process the contribution accordingly, you must add the Benefit Codes created to the Pay code Maintenance and the Crew Contract, Benefit tab.

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Adding a Pension Plan Code to a Contract

1. On the **Crew Edit Detail** form, click **Edit Contract** of the selected crew.
2. On the Change Contract form, click **Add Pay code** and then navigate to the **Benefit** tab.

Figure 26-66 Pension Plan Contract Pay code Maintenance



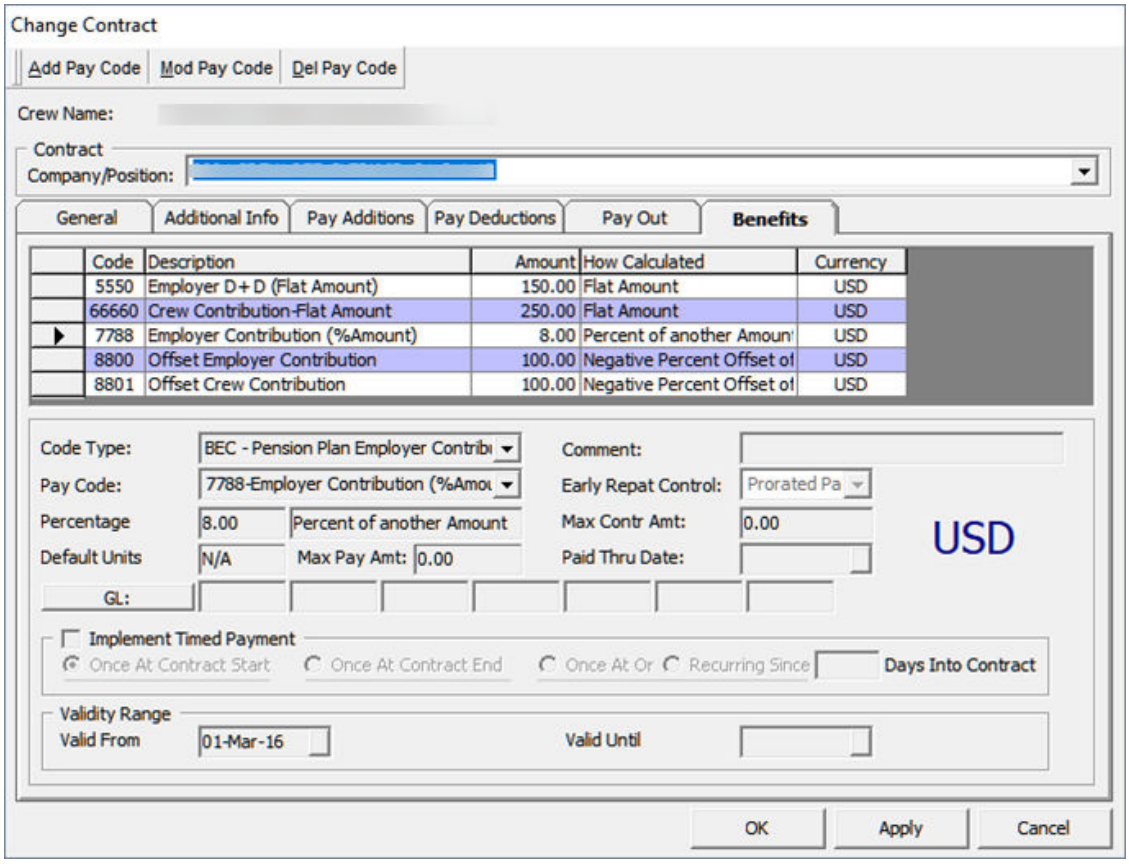
3. Select the **Code Type** and **Pay Code** from the drop-down list and insert the value accordingly (Percentage or Flat Amount).
4. Enter the **Validity Range** and then click **Insert** to save the code. Click **Apply** before closing the form.

Example 1: Pension Plan with Flat Amount

In the following example, a crew is contributing $250 from his monthly income of $1500 to the pension plan, whereas the employer contributes 8 percent of the crew's applicable earning to the pension plan and $150 towards the Death and Disability. The crew contract would consist of these pay codes in their contract.

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Figure 26-67 Pension Plan with Flat Amount



The following tabs provide the following information.

- **Pay Additions:** A Basic Wage of $1500.
- **Benefits:**
  - A Crew Contribution by Flat Amount of $250.
  - A Employer Contribution by Percentage of 8 percent.
  - A Death and Disability Contributions of $150.

In the Crew Payroll Detail form, the crew member contribution of $250 is reflected on the crew pay sheet under **Pay Code Deduction**. The crew contribution deduction debited from the crew member's payroll is shown in the **Crew Payroll Details, Payroll, Payroll tab**.

You can also view the **Crew Contribution, Employer Contribution** and **Death and Disability Contribution** from the **Crew Payroll Detail, Payroll, Benefits** tab. The Offset Employer Contribution and Offset Crew Contribution is shown as a negative value.

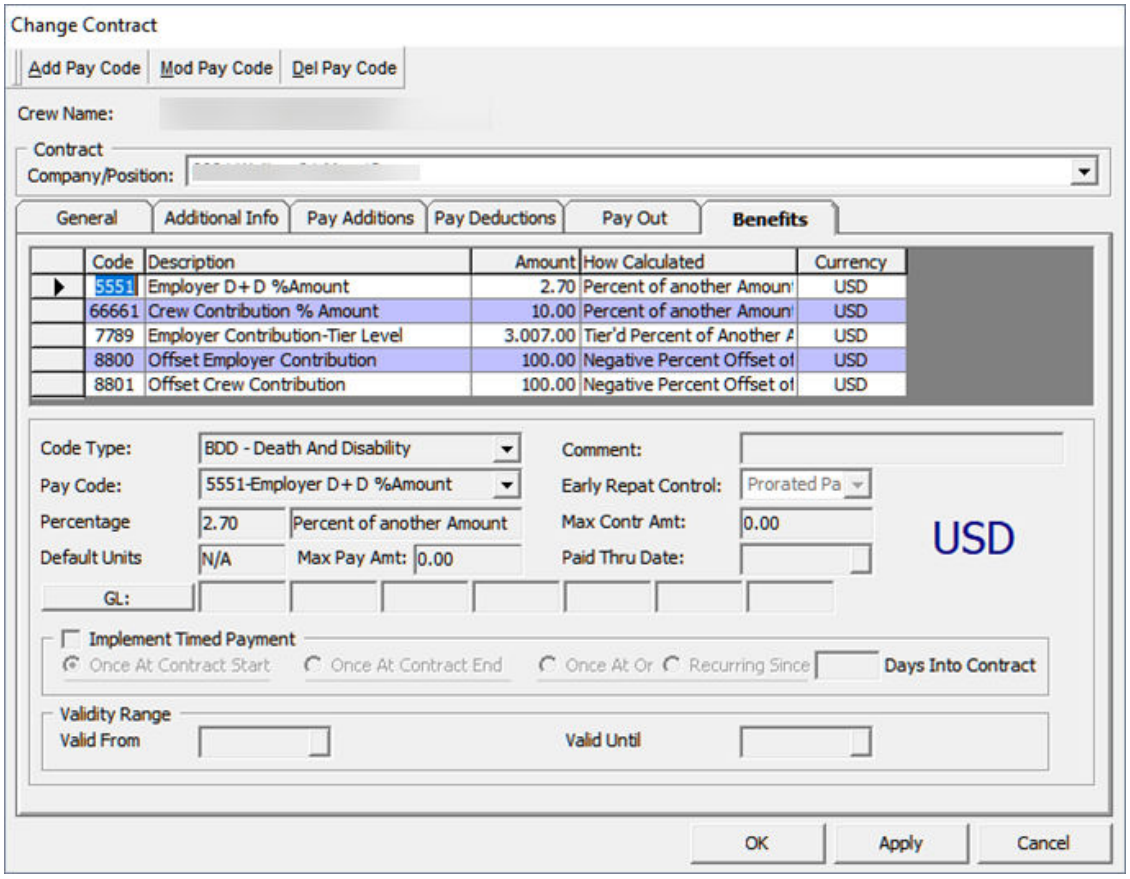
Example 2: Pension Plan with Percentage Amount

In the following example, a crew member contributes 10 percent of total consolidated wages of $1500 to the Pension Plan. The employer will match 100 percent of the first 3 percent of the crew contribution and another 50 percent of the next 7 percent, based on his applicable monthly earning. The employer also contributes 2.7 percent of the crew member's applicable

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monthly earnings towards the Death and Disability Plan. The crew contract would consist of these pay codes in their contract.

Figure 26-68 Pension Plan with Percentage Amount



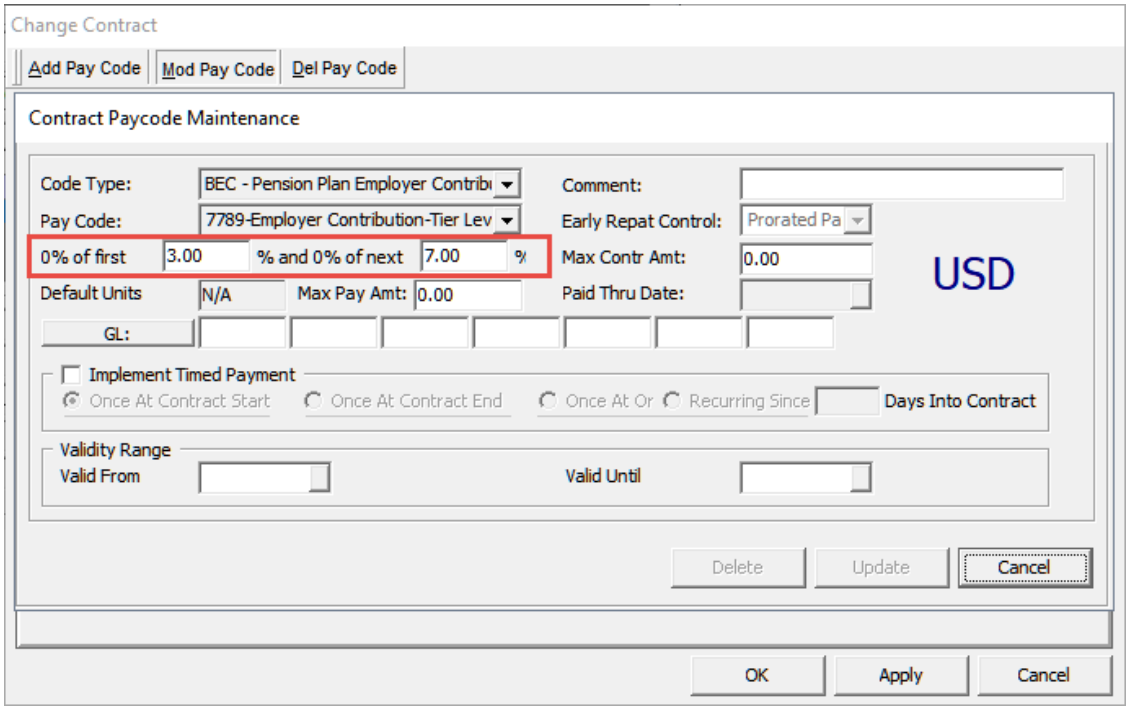
The following tabs would contain the information below.

- **Pay Additions:** A Basic Wage of $1500
- Benefits:
  - A Crew Contribution by Percentage % Amount of 10 percent.
  - A Employer Contribution by Percentage of 3 percent and 7 percent.
  - A Death and Disability Contributions by (%Amount) at 2.7 percent.

For Employer Tier Level contribution, it will have the 3 percent value in the first field, followed by 7 percent in the next field.

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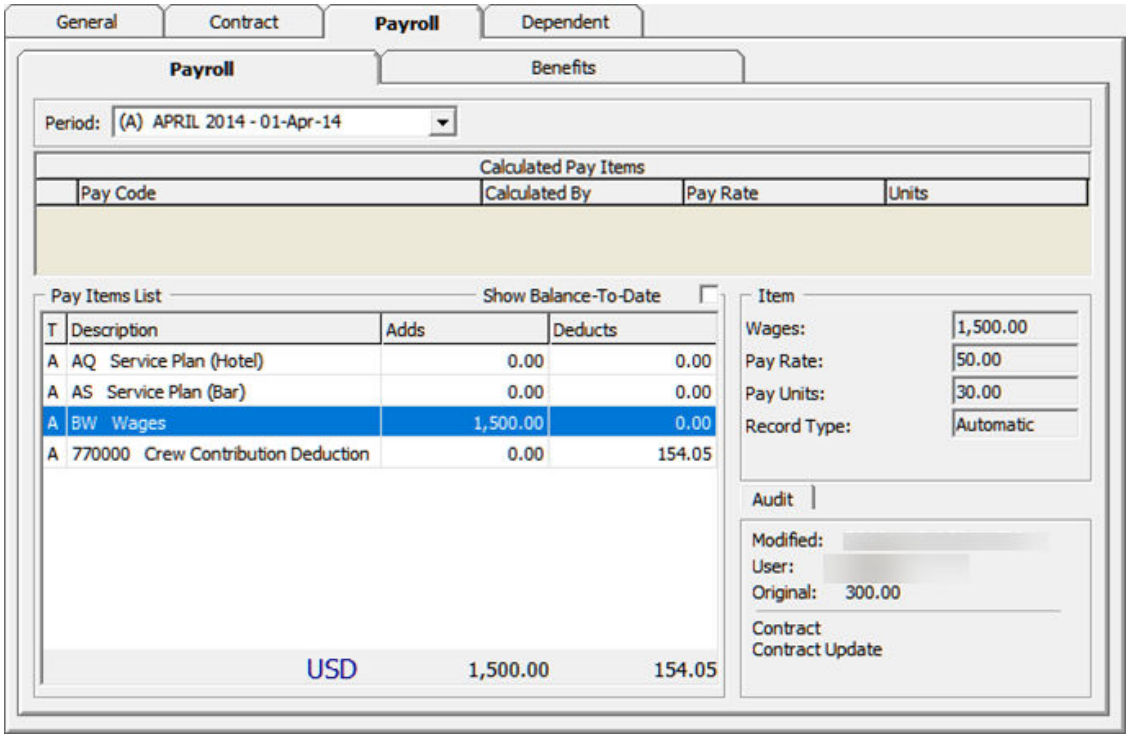
Figure 26-69 Employer Pension Plan Tier Level



> **Note**
>
> The default 100 percent for the Tier Level functionality is flexible and able to change from the parameter **Payroll, Tier 1 Percentage** and the remaining 50 percent is defined in **Payroll, Tier 2 Percentage**.

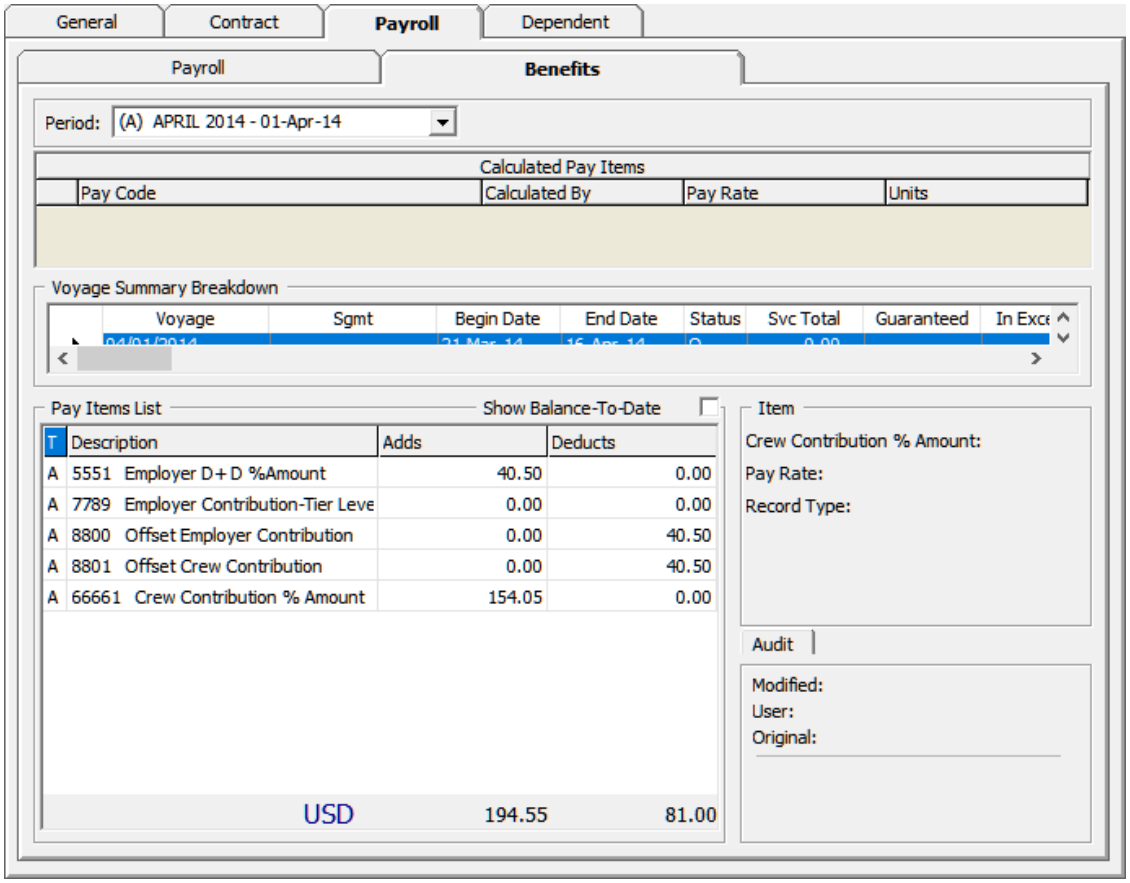
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Figure 26-70 Payroll Tier



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Figure 26-71 Benefits Postings

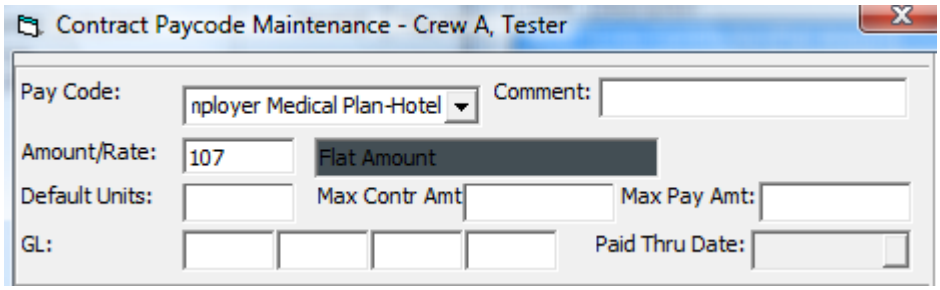


Example of Medical Plan Setup

Example 1 – BUPA Health Coverage without Dependents

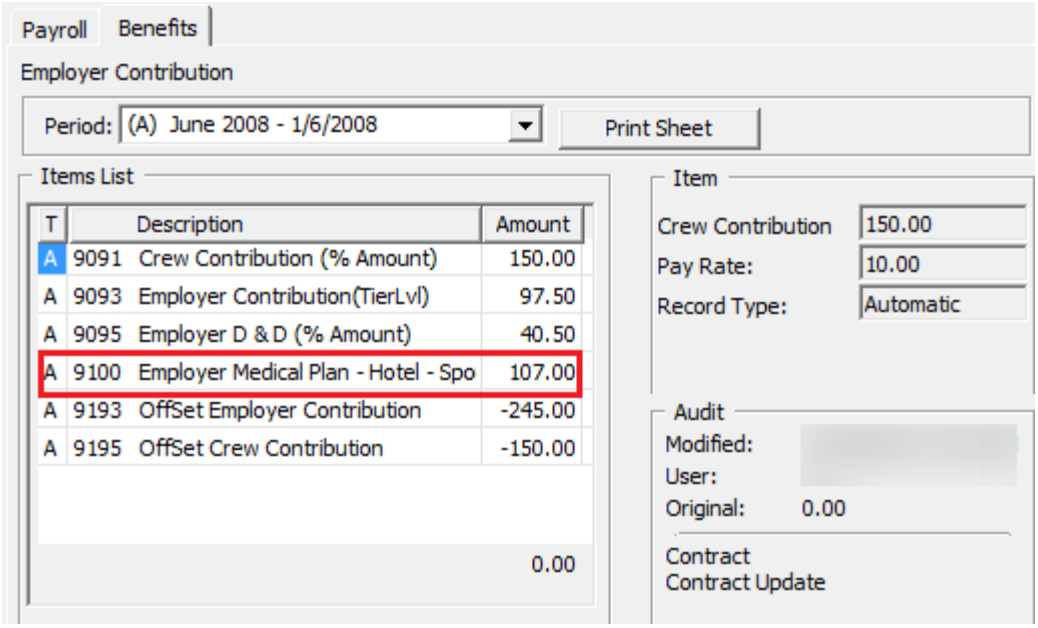
In this example, a Hotel Crew has a BUPA Coverage of $107 paid by the employer and the crew does not have any dependents.

Figure 26-72 Health Coverage without Dependents 1



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Figure 26-73 Health Coverage without Dependents 2



To add the BUPA Health Coverage, navigate to the **Benefit tab** of the crew and add the **Employer Medical Plan-Hotel** pay code.

- The system will update all the active pay codes into the crew payroll detail. The employer expense of $107 is not visible on the crew pay sheet but is stored and reported in the General Ledger Month End file.
- You can view the Employer Medical Plan Contribution from Crew Payroll Detail, Payroll, Benefits tab. The Offset Employer Contribution will show a negative value to offset the benefit posting.

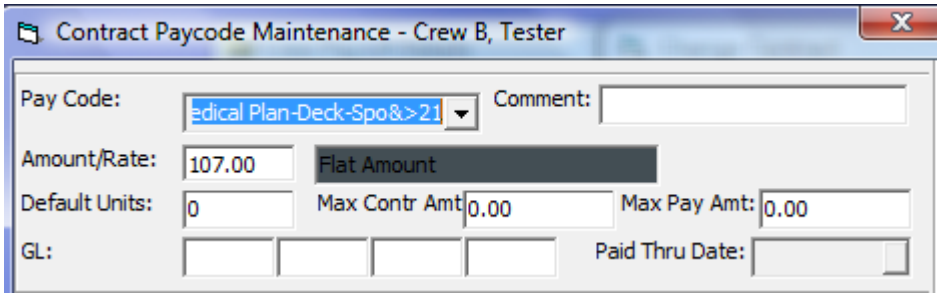
Example 2 – BUPA Health Coverage with Dependents

In this example, the Staff Captain is entitled to a BUPA coverage of $107 contributed by the employer and has chosen dependent coverage for the spouse. The Medical Plan rate given by BUPA for the dependent option is $107.

To add the dependent coverage:

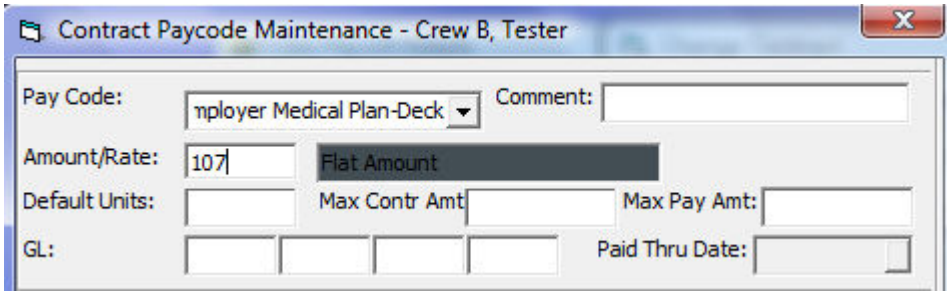
- Navigate to the **Benefit tab** of the **Crew Payroll Detail** form and select **Crew Medical Plan-Deck-Spouse**, and then enter the amount.
- Add a pay code for the crew using the Employer Medical Plan-Deck of $107.

Figure 26-74 Health Coverage with Dependents 1



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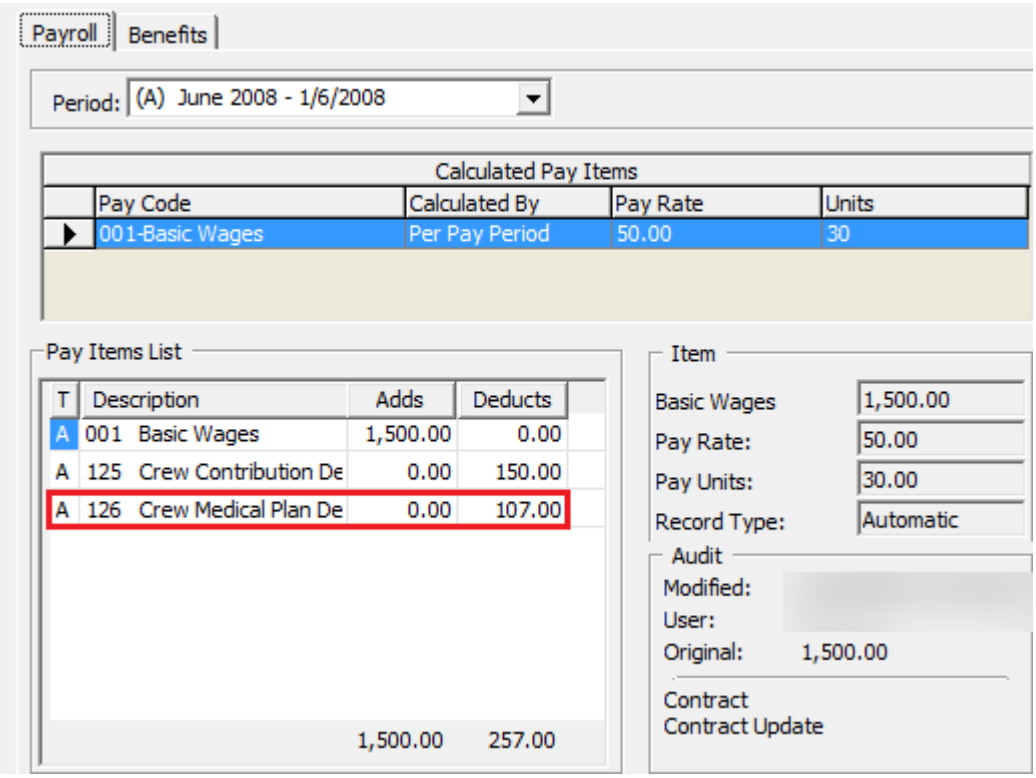
Figure 26-75 Health Coverage with Dependents 2



The system will update the active pay code into the crew payroll detail form. In the Crew Payroll Detail form, the dependent expense of $107 is deducted from the employee and reflected in the pay sheet by the **Pay Code Deduction**.

The crew dependent coverage deduction is debited from the crew member's payroll and is shown under the Crew Payroll Detail, Payroll, Payroll tab.

Figure 26-76 Health Coverage with Dependents 3



The Employer expense of $107 is not shown in the crew pay sheet, but is stored and reported in the General Ledger Month End file.

You can view the Employer Medical Plan Contribution from the **Crew Payroll Detail, Payroll, Benefits** tab. The Offset Employer Contribution will show a negative value to offset benefit posting.

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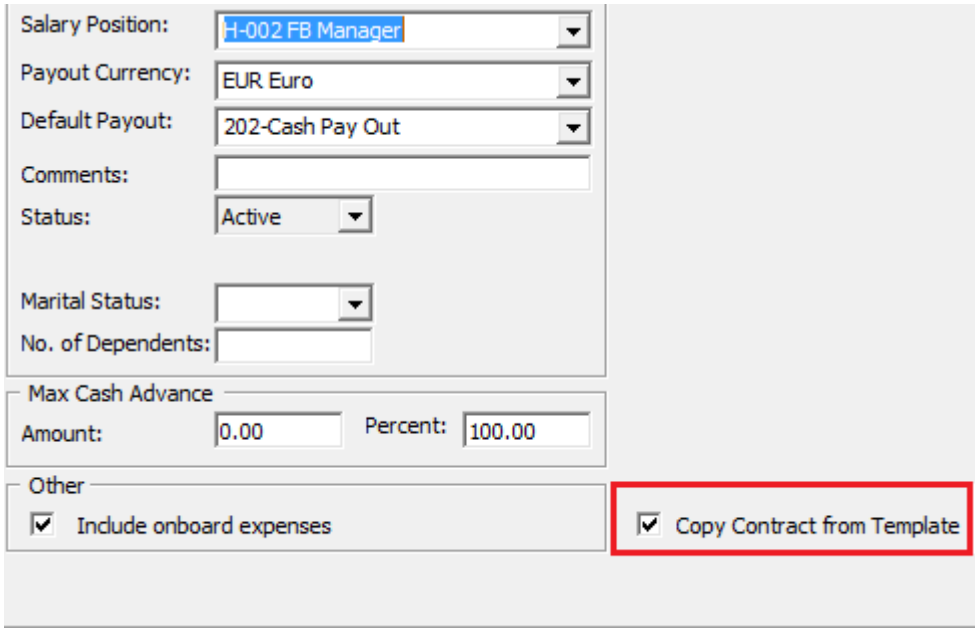
Contract Templates with Pension Plan and Medical Plan

You can add all the benefit pay codes using the Contract Templates under Contract Template setup.

To add the pay code in the Contract Template:

1. Select the Salary Position and click **Add Pay Code**.
2. Select the benefit pay code and enter the percentage rate or flat amount.
3. When assigning the contract to the crew member, and in order for the system to auto populate all the benefit pay codes, you must select the check **Copy Contract from Template**.

Figure 26-77 Copy Contract from Template Check Box



Benefit Administration Information

Pension Plan Information

Each crew member is allowed to participate in one (1) Pension Plan. In order for the benefit to be added to the crew, you must,

- Enable the Allow Add Crew checkbox in the Payroll Companies Maintenance form
- Link the pension plan in the Crew Personal Details form under the Nordben and BUPA Details section.

To add the pension plan to the crew Personal Details form:

1. Navigate to the **Crew Payroll Detail, General, Edit Person**.
2. Select the **Pension Plan Type** and enter the **Nordben Policy number**.

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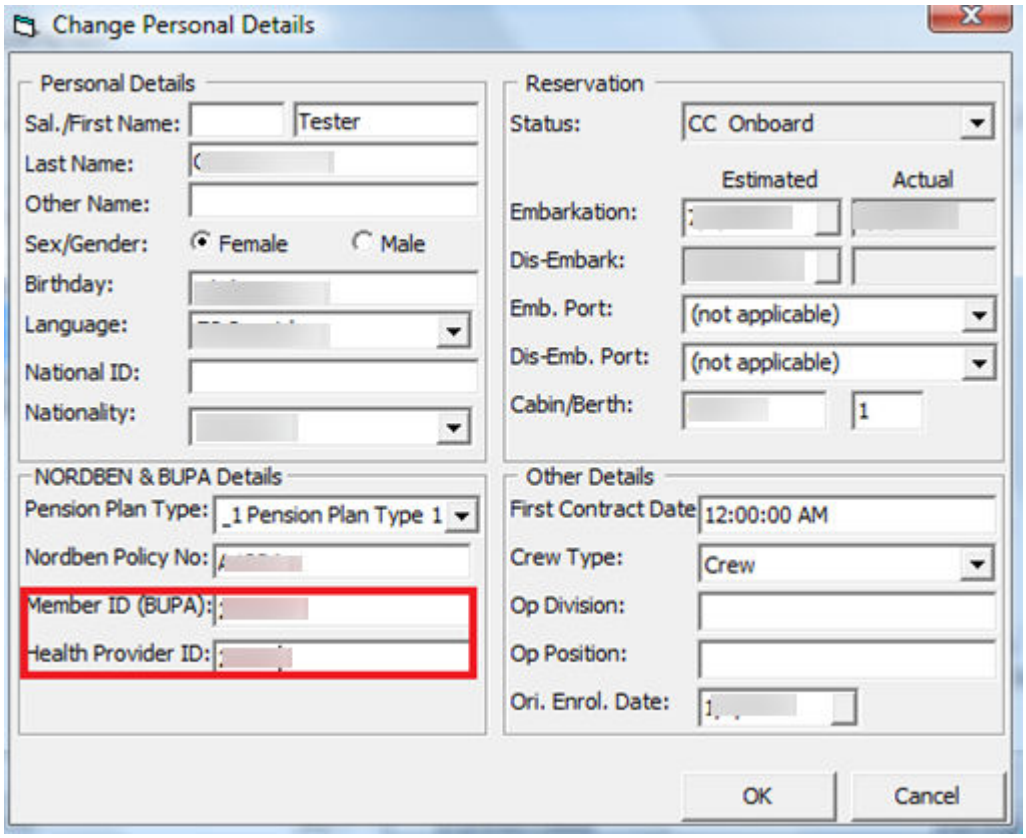
> **Note**
>
> There are two (2) types of Pension Plan:

- Pension Plan Type 1 – Employer contribution with default of 8 percent of the crew's applicable monthly earning.
- Pension Plan Type 2 – Employer contribution with the Tier Level calculation method.

Crew BUPA Information

The Crew member who is entitled to the BUPA Medical Plan coverage has a unique **BUPA ID** associated with the **Health Provider ID**. You must insert these IDs into the Crew member's Personal Details form.

Figure 26-78 BUPA Member ID and Health Provider ID

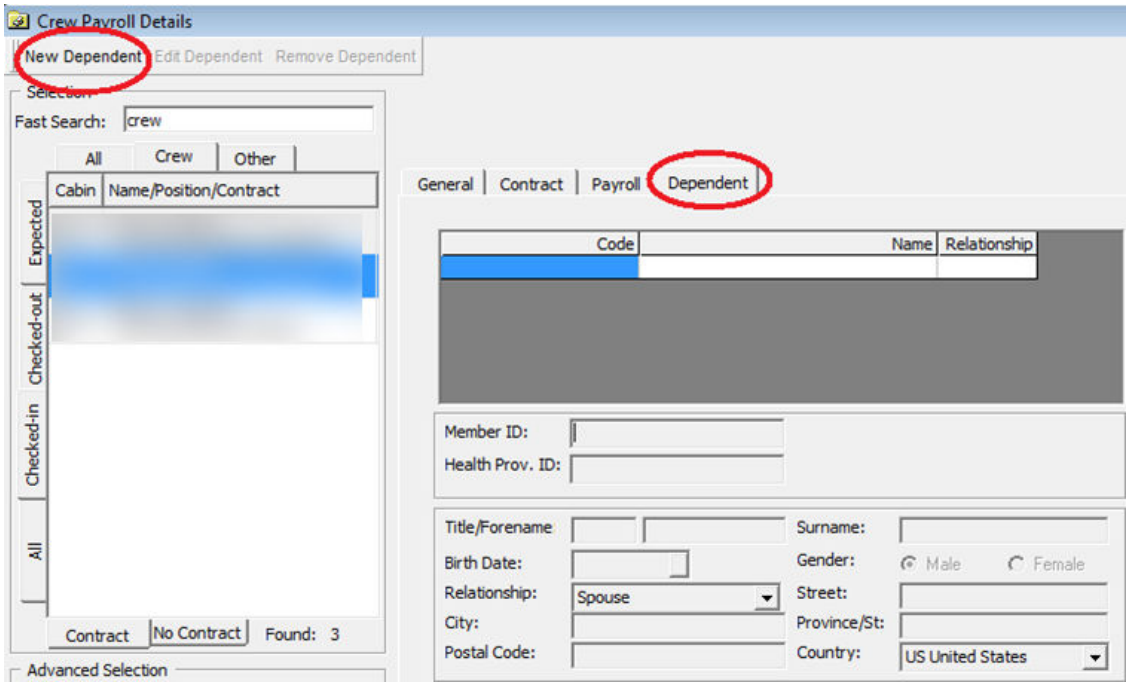


Dependent Information

In the Crew member's Payroll Detail form, a Dependent tab is made available to maintain the dependent's information.

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Figure 26-79 Dependent Information



To add the dependent information:

1. Click the **New Dependent** button on the Crew Payroll Details form.
2. Each dependent should have a unique BUPA ID associated to the Health Provider. Enter the ID in the **Member ID** field and **Health Prov. ID** field, and the mandatory field such as **Forename, Surname, Member ID, Birthday, and Relationship Type**.
3. Click **Insert** to save.
4. You can add, edit, or remove the dependent information where necessary.

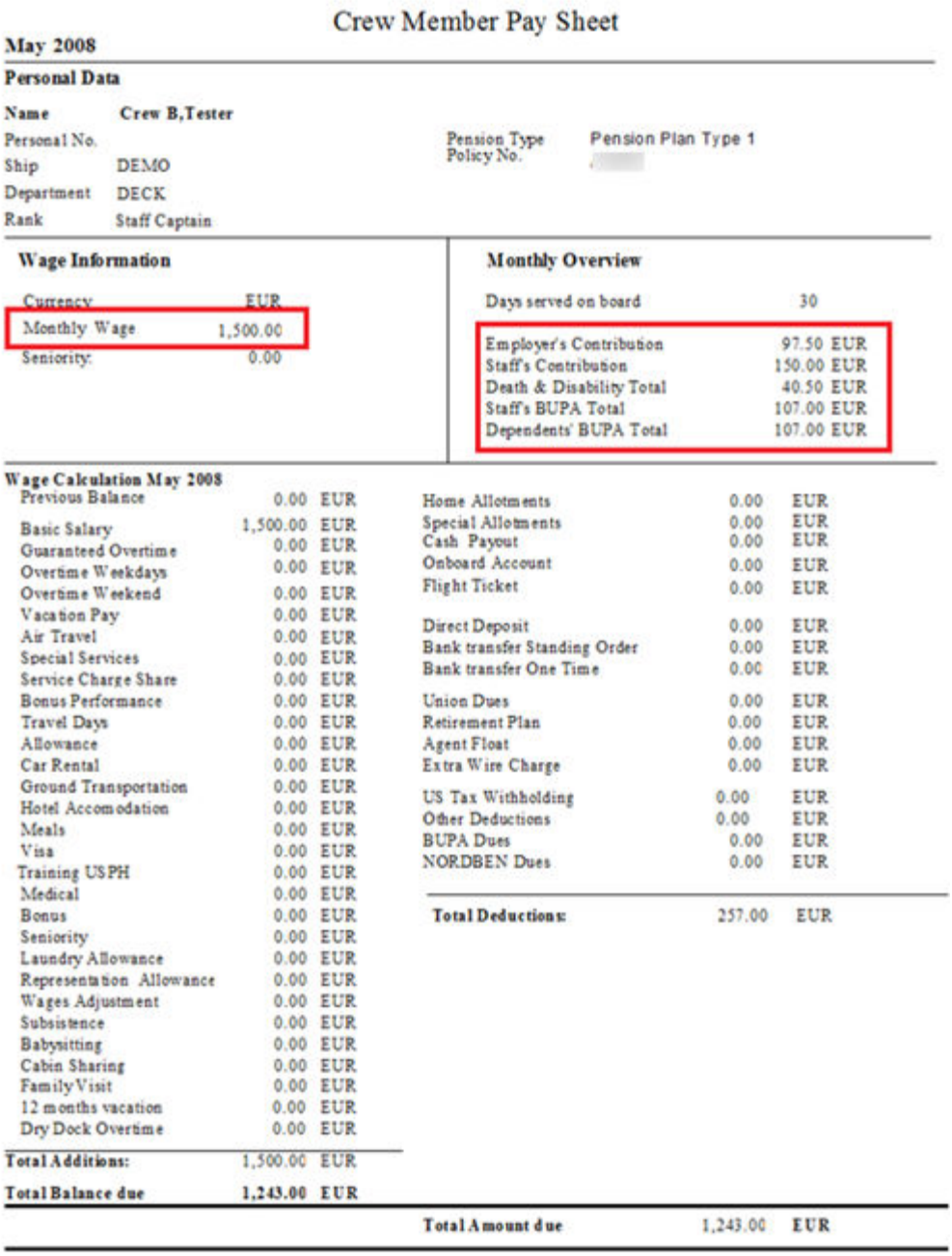
Pay Sheet Report

Contributions by the crew or employer are visible in the Crew Pay Sheet Report, except for the Employer Death and Disability contribution, where you have an option to make it visible or not.

Below is the sample Crew Pay Sheet:

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Figure 26-80 Sample Crew Pay Sheet



Crew Member Pay Sheet

May 2008

Personal Data

Name	**Crew B,Tester**		
Personal No.		Pension Type	Pension Plan Type 1
Ship	DEMO	Policy No.	
Department	DECK		
Rank	Staff Captain		

Wage Information

Currency	EUR
Monthly Wage	1,500.00
Seniority	0.00

Monthly Overview

Days served on board	30
Employer's Contribution	97.50 EUR
Staff's Contribution	150.00 EUR
Death & Disability Total	40.50 EUR
Staff's BUPA Total	107.00 EUR
Dependents' BUPA Total	107.00 EUR

Wage Calculation May 2008

Previous Balance	0.00	EUR	Home Allotments	0.00	EUR
Basic Salary	1,500.00	EUR	Special Allotments	0.00	EUR
Guaranteed Overtime	0.00	EUR	Cash Payout	0.00	EUR
Overtime Weekdays	0.00	EUR	Onboard Account	0.00	EUR
Overtime Weekend	0.00	EUR	Flight Ticket	0.00	EUR
Vacation Pay	0.00	EUR			
Air Travel	0.00	EUR	Direct Deposit	0.00	EUR
Special Services	0.00	EUR	Bank transfer Standing Order	0.00	EUR
Service Charge Share	0.00	EUR	Bank transfer One Time	0.00	EUR
Bonus Performance	0.00	EUR			
Travel Days	0.00	EUR	Union Dues	0.00	EUR
Allowance	0.00	EUR	Retirement Plan	0.00	EUR
Car Rental	0.00	EUR	Agent Float	0.00	EUR
Ground Transportation	0.00	EUR	Extra Wire Charge	0.00	EUR
Hotel Accomodation	0.00	EUR			
Meals	0.00	EUR	US Tax Withholding	0.00	EUR
Visa	0.00	EUR	Other Deductions	0.00	EUR
Training USPH	0.00	EUR	BUPA Dues	0.00	EUR
Medical	0.00	EUR	NORDBEN Dues	0.00	EUR
Bonus	0.00	EUR			
Seniority	0.00	EUR	**Total Deductions:**	257.00	EUR
Laundry Allowance	0.00	EUR			
Representation Allowance	0.00	EUR			
Wages Adjustment	0.00	EUR			
Subsistence	0.00	EUR			
Babysitting	0.00	EUR			
Cabin Sharing	0.00	EUR			
Family Visit	0.00	EUR			
12 months vacation	0.00	EUR			
Dry Dock Overtime	0.00	EUR			
Total Additions:	1,500.00	EUR			
Total Balance due	**1,243.00**	**EUR**			
			Total Amount due	1,243.00	EUR

OHC GL Accounting

The OHC GL Accounting module is used to generate the payment file and submit to the bank. Once the payout is processed at the end of the pay period, Credit posting is made available to the crew member of the selected credit card, made through Ocean Pay.

The parameter **Payroll, Pay codes for OceanPay Top-Up Transactions** holds the pay code for payroll deduction pay codes that need to be transferred into the payment file when transactions are posted.

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Below is the field definition of GL Export Setup.

Figure 26-81 GL Export Setup

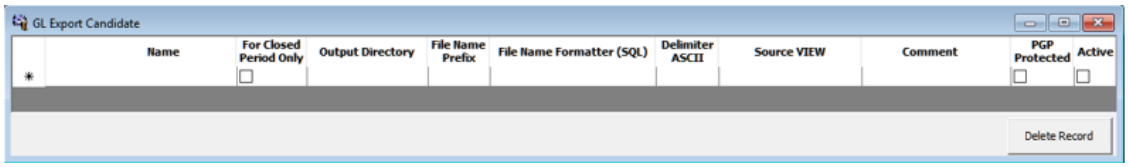
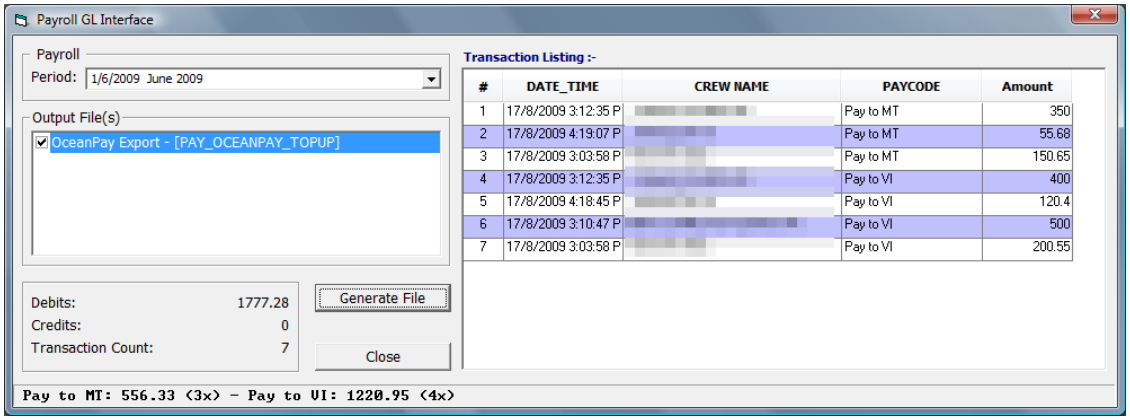


Table 26-25 GL Export Field Definition

Column Name	Definition
Name	OceanPay Export used for the file generation.
For Close Period Only	When enabled, you can only generate the transaction file when the pay period is closed.
Output Directory	Location of the output file once generated. For security purposes, the directory/folder defined must be within the network.
File Name Prefix	Output file name. For example: *ExampleData120100629 46065.txt.PGP*
File Name Formatter (SQL)	An SQL query to select a specific column as part of the file name.
Delimiter ASCII	Use in output file if it has multiple columns. Define blank if file is fixed length field.
Source View	Refers to a database view. For example: *PAY_OCEANPAY_TOPUP*
Comment	File description
PGP Protected	If enabled, the browser prompts you to upload the public key provided by the bank.
Active	Active if enabled, Inactive if disabled.

The following screenshot shows the transaction listing of the pay code deduction defined in the parameter **Pay codes For OceanPay Top-Up Transactions**.

Figure 26-82 Payroll GL Interface



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The Program exports the records by referring to the pre-defined Source View. Only the column with prefix “F_” will be exported.

Below are the reserved fields that must exist in the View script.

- PCY_ID
- SPP_ID

The following fields are optional in the View script.

- ROW_NUM
- PAY_ID
- PAY_AMOUNT

The records generated are stored in the PTG table to prevent double postings.

OHC Payroll GL EOM

Apart from generating the payment file and submitting it to the bank, the application also enables you to submit the payroll payout for import into the General Ledger at the end of the month.

You must enable the parameter **Payroll GL EOM** listed in the following table. The configuration of the **Pay code Maintenance, Contract Templates** and usage of the crew payroll differs from the regular Payroll GL. The pay code must have:

- GL Code
- Validity Range – From / Until

Table 26-26 Payroll GL EOM Parameters

Parameter Name	Description
Date Format	To determine the file date format to display in GL Payroll. The default date format is MM/DD/YY.
Date Prefix	Prefix to precede data value in the GL Payroll file. For ResidenSea, the prefix will be “PU-”.
Mandatory Paid Thru Date for Vacation Pay	The value “Y” identifies whether the Paid Thru date is mandatory when the Vacation Pay Pay code is assigned. The default value is “N”.
Number of Day History Backup	Number of days to keep the generated Payroll GL file in History folder.
Pay code for Vacation Pay	Designated Vacation Pay Pay-Code Type. (Pay code refers to TYP_SPG). Use comma (,) as delimiter if there is more than 1 Pay code Type.
Transfer Folder	This folder stores all generated Payroll GL files.

Pay code Maintenance

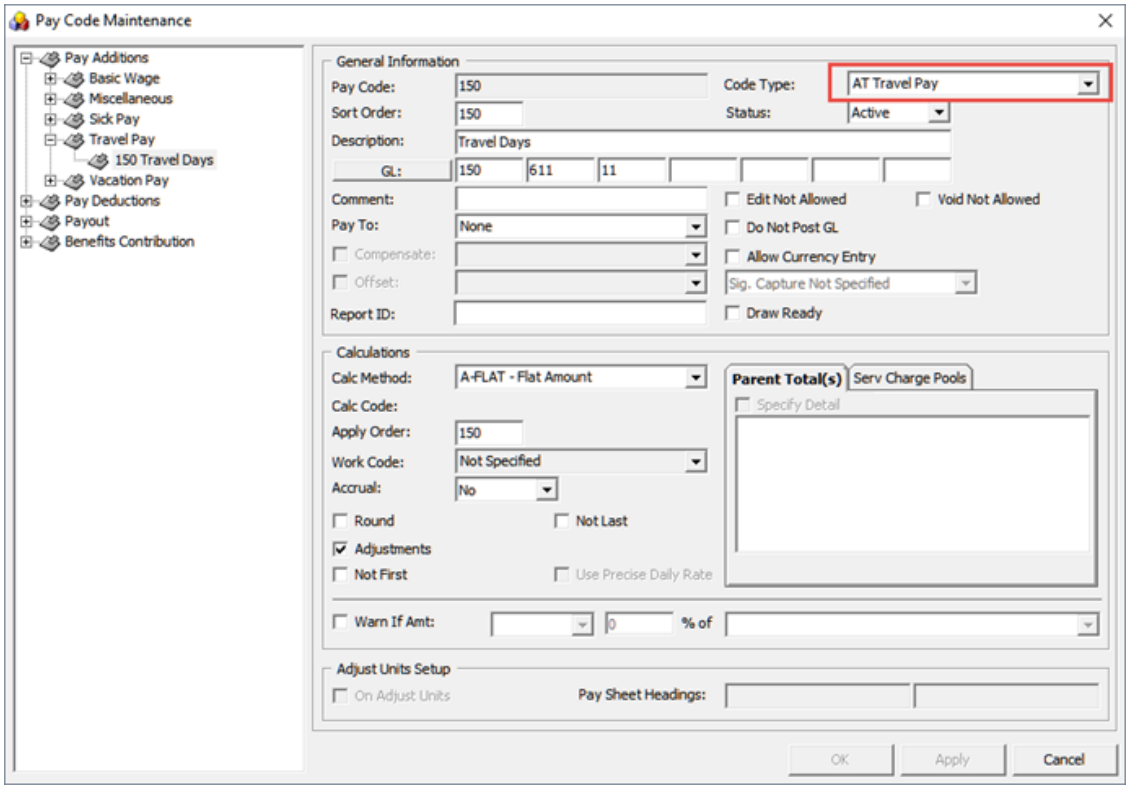
On the Pay code Maintenance screen, assign the **Code Type** of the Pay code that is used to determine the type and group.

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The code type for the Vacation Pay pay code is according to the pay code defined in the parameter **“Pay code for Vacation Pay”**.

The GL Code is mapped to the shore side General Ledger account for which the pay code is accounted for. If no GL code is mapped in the crew contract assignment, the Pay code will refer to the GL code entered in this form.

Figure 26-83 Payroll GL Code Type



Contract Templates

In the Contract Templates, the Pay code must have a GL code linked. The GL code for each pay code can be different even though the base wage may be the same. See section Adding Pay code to Contract Template.

Crew Payroll Details

In order to generate the GL file and correctly pay the crew, the Pay code must have:

- GL Code that is entered in the Contract Templates
- Validity Range entered in the Pay code of the Crew Details form, equivalent to the contract end date when the **New Contract** button is pressed.

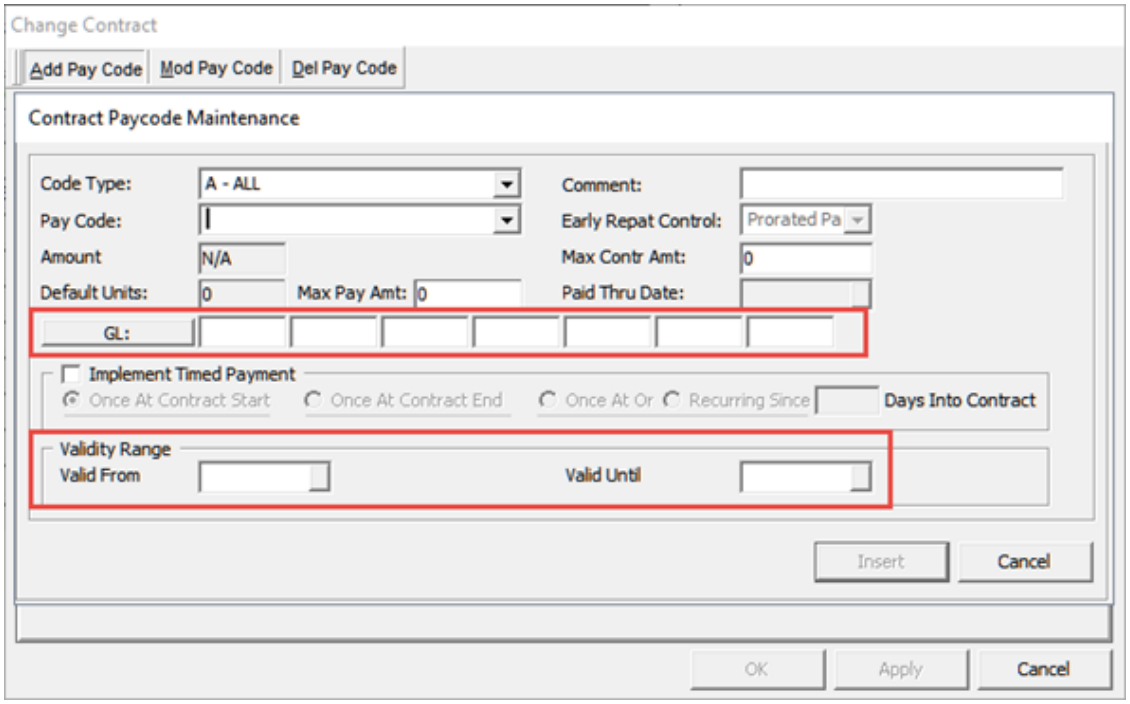
The Validity Range fields refer to:

- Selected Pay code Type

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- The value defined in Parameter **Pay code for Vacation Pay**.
- The value of the parameter **Mandatory Paid Thru Date for Vacation Pay** is set to **Y**.

Figure 26-84 GL Entry Fields



If no validity is specified, the system will prompt you to complete them.

The Crew member may have one or more contracts and each contract may have multiple pay codes attached, and they must be updated with the validity date.

Generating GL EOM file

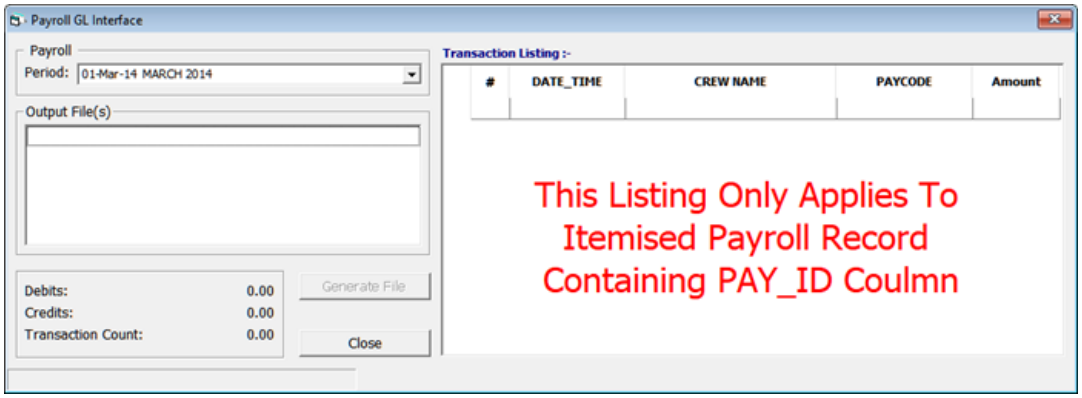
The GL EOM file is generated through the OHC Payroll GL interface.

To generate the file:

1. Log in to the **OHC Payroll GL** interface.
2. On the **GL Transfer** menu, select **Generate File**.

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Figure 26-85 GL EOM Transaction Listing



3. Select the pay period from the drop-down list.
4. Click the **Generate File** button to generate the output file. Location of the output file is defined in the **Transfer Folder** parameter.
5. If you have generated the file for the selected period, the system will prompt you to rename the existing file before you are allowed to proceed.
6. Multiple records per position will be listed in the output, depending on the number of pay codes associated to each crew member.

> **Note**
>
> Content of the files generated are retained in the History folder for backup and the days to keep in history is based on the value entered in the parameter **Number of Day History Backup**.

GL EOM Output File format

There are three output formats that you can generate from the interface:

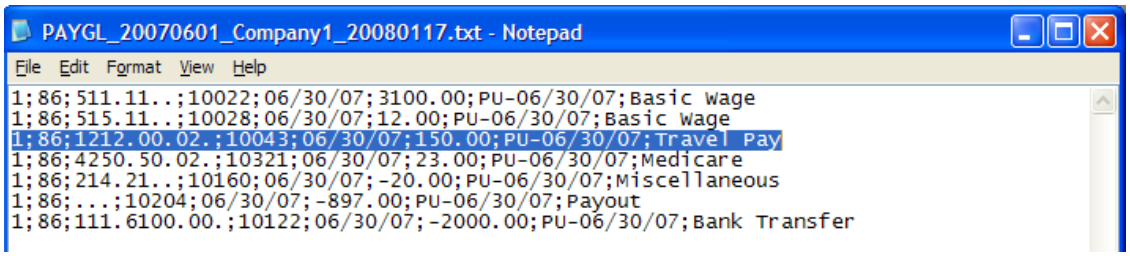
- Payroll GL Extract – Summary
- Payroll GL Extract – with Position
- Payroll GL Extract – with Position and Vacation Pay Detail

Although the output file is saved in text format, you can convert the information to an Excel spreadsheet by opening the file with Microsoft Excel and using the default Text Import Wizard setting.

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Example of Payroll GL Extract — Summary

Figure 26-86 Sample GL Extract File — Summary

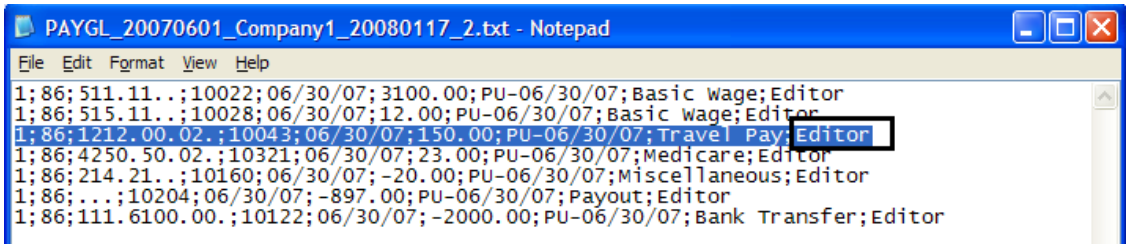


The summary output file contains:

- Company code.
- Salary group ID – Mapping ID defined Department Mapping menu.
- GL Number – Map with shore side general account ledger.
- Pay Code Number.
- EOM Date – The date format is set in the parameter **Date Format**.
- Amount.
- PU-MM/DD/YY – The date prefix is set in parameter **Date Prefix** where the date is set according to Date Format.
- Pay Type Classification.

Example of Payroll GL Extract – with Position

Figure 26-87 Sample GL Extract File — with Position

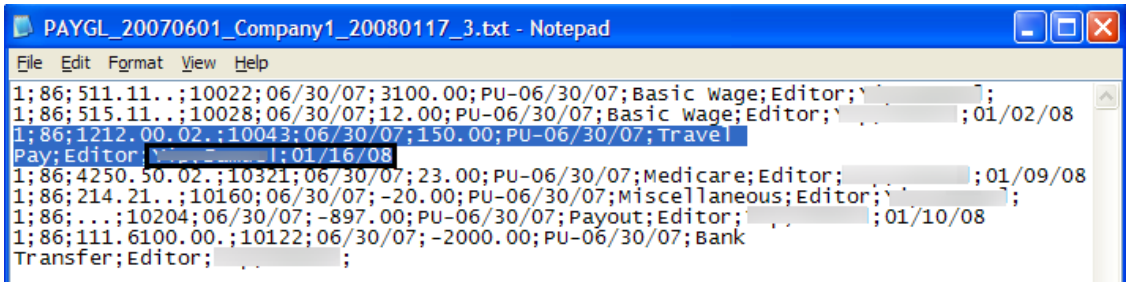


Apart from the fields listed in the Summary output file, it includes a Crew Position at the end of the string.

Example of Payroll GL Extract – with Position and Vacation Pay Detail

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Figure 26-88 Sample GL Extract File — with Vacation Pay Detail

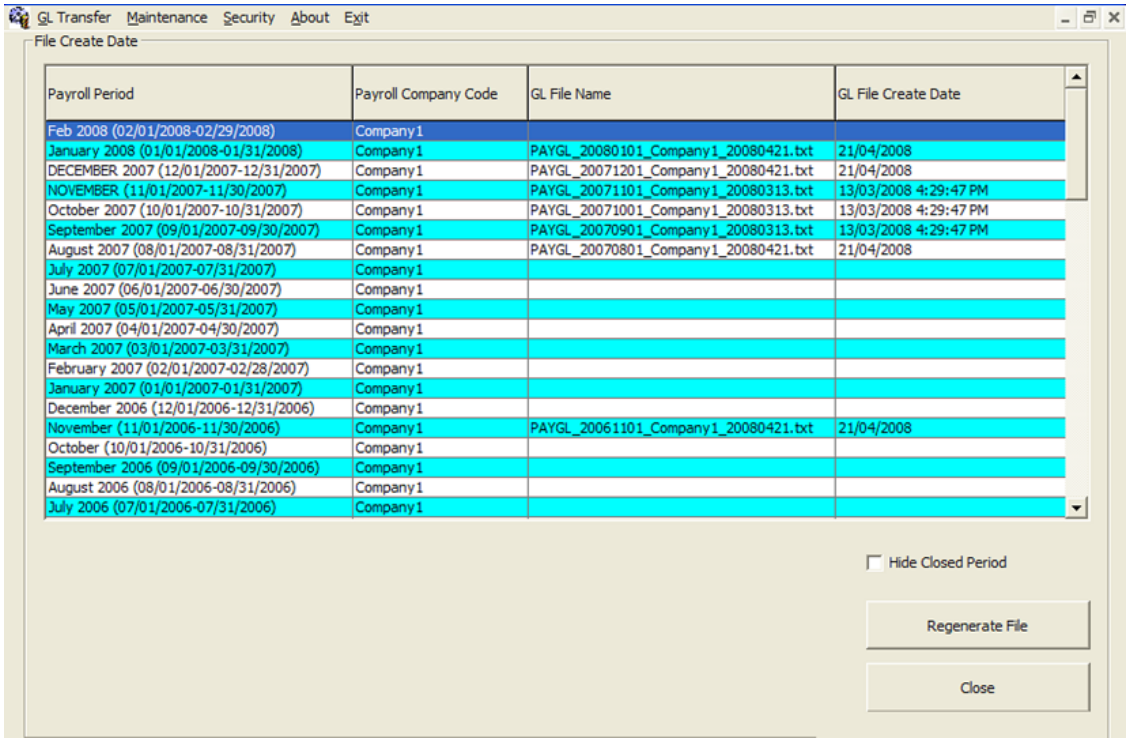


The output string includes the Crew Position, First Name, Last Name and Paid Through Validity, in addition to the Payroll GL Extract – Summary.

Regenerating the GL file

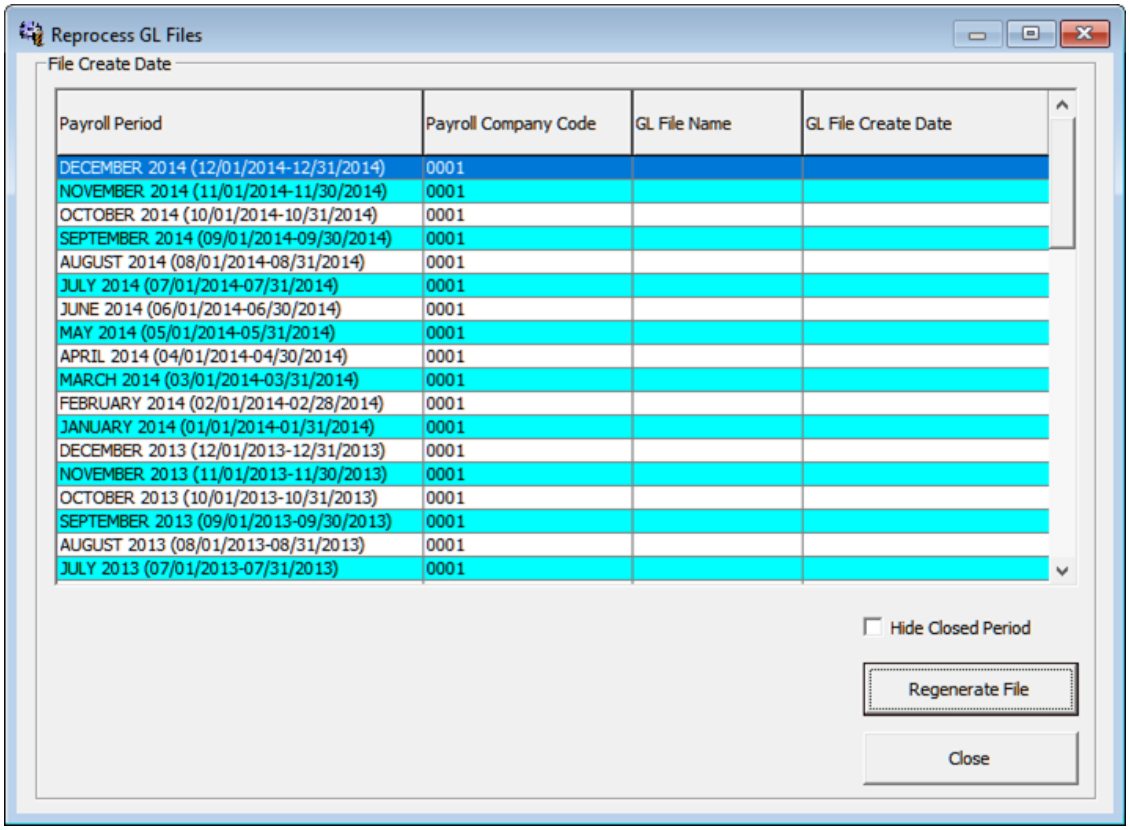
The system permits you to re-generate past GL files using the **Reprocessing** option from the GL Menu.

Figure 26-89 Regenerate GL File



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Figure 26-90 Reprocess GL File



Click the **Reprocessing** option:

1. Opens the Reprocess GL Files window.
2. Select the file from the grid and then click the **Regenerate File** button.

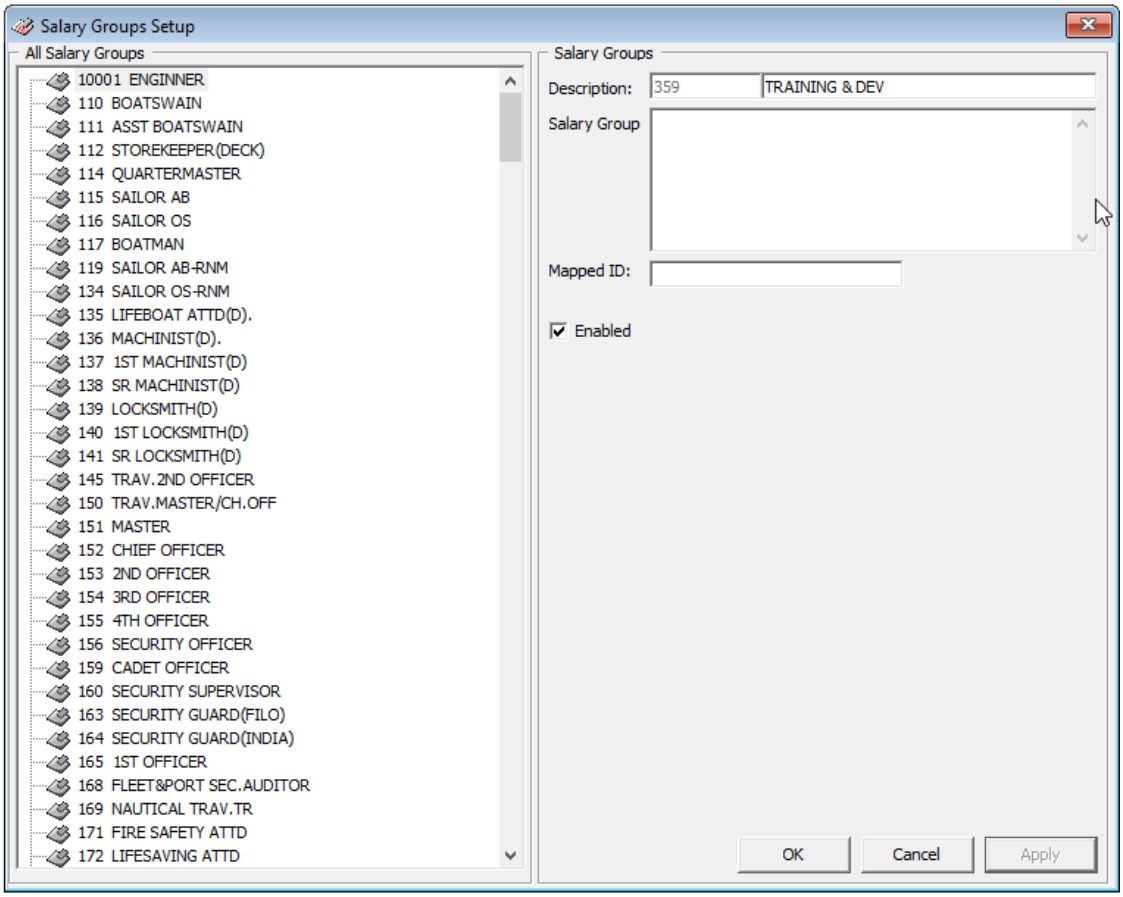
> **Note**
>
> This replaces the previously generated files stored in the **Transfer Folder**.

Department Mapping

You can map a shore side general ledger ID to the department code by selecting Department Mapping from the Maintenance menu to view the salary group.

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Figure 26-91 Salary Group Setup



- The mapped ID of Salary Group is equivalent to the shore side General Ledger account ID.
- If there is no mapping ID defined, the output file will have a blank space at the 2nd column (salary group ID column).

Appendix

System Parameters

Below are the system parameters available to Payroll Module. Consult Oracle Hospitality Cruise Customer Support prior to changing the Database Parameter to avoid any adverse implications.

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Table 26-27 System Parameters

PAR Name	PAR Value	Description
Allow Closing of Pay Period Prior To End of Period	1 / 0	1= Allow program close pay period when pay period end date is greater than current PC date. 0= Do not allow to close pay period pay period end date is greater than current PC date.
Auto Close Balanced Posting When Close Pay Period	1 / 0	This is to avoid invoices from stacking up in Management module. 1= When close pay period Program automatically closes the posting for each crew member onboard invoice. 0= Do not close posting when close pay period.
Auto Close Pay Period After x Number of Days		Auto close pay period after x number of days system date change is run.
Base Wage Pay code For Corporate Instruction		Use by OHC DGS CMS.
Date Type	F / S	Determines whether Oracle date or SPMS system date is used for payroll calculations. S= Oracle date. F= SPMS system date (default).
Default Company Code		Value of PCY.PCY_CODE. Default company if there have multiple companies' setup.
Default Payout		Value of SED.SED_NO. Default Payout code to display in the payout combo box on a new contract.
Default To 1 When Invalid Berth Number Is Entered	1 / 0	Value to select when editing a record in **Edit Person** function. 1= Default to 1 when no berth number is entered. 0= Prompt berth number is required.
Display UXP_C_EXTERNALID As Crew ID	1 / 0	ID display in Payroll Summary section. 0= UXP_C_INTERNALID. 1= UXP_C_EXTERNALID.
Early Period Open	A / Y / N	Determine whether to allow activation of pay period before current system date. A= Always allow. Y= Allow once. N= Do not allow.

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Table 26-27 (Cont.) System Parameters

PAR Name	PAR Value	Description
Edit Details Screen	1 / 0	0= Classic Screen. 1 – Quick reference screen
Folio Posting	Y / N	Y= Allow to post crew onboard expenses when payout. N= Disallow (default).
GL Interface	Y / N	Y= Generate GL file after closing a pay period. N= Do not generate GL File after closing a pay period.
Journal Id		The text used to identify payroll GL journals.
OceanPay File Output Folder	C:\temp	Path of folder for saving output files during generate card ordering for Cashless Payroll.
OceanPay MT Prefix Nbr	54	Defaults prefix number for MT Card. Populated in Cashless Payroll setup.

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Table 26-27 (Cont.) System Parameters

PAR Name	PAR Value	Description
Exactly 30	Y / N	Change the way the number of days are calculated when changing positions in linked contract. Y= If linked contract and contract is in middle of a month, then it will use 30 days instead of the number of days in the month to determine payment. For example: For 30 days in month: - Contract 1 from 01/06/2008 - 10/06/2008 = 10 days - Contract 2 from 11/06/2008 - 20/06/2008 = 10 days - Contract 3 from 21/06/2008 - 28/09/2008 = 10 days For 31 days in month: - Contract 1 from 01/07/2008 - 10/07/2008 = 10 days - Contract 2 from 11/07/2008 - 20/07/2008 = 10 days - Contract 3 from 21/07/2008 - 28/09/2008 = 10 days (calculate as 10 days even date from 21/07/2008 to 31/07/2008) N= Calculate based on number of day (31 days being paid since either contract end date or the contract start date fall in the pay period). For example: For 30 days in month: - Contract 1 from 01/06/2008 - 10/06/2008 = 10 days - Contract 2 from 11/06/2008 - 20/06/2008 = 10 days - Contract 3 from 21/06/2008 - 28/09/2008 = 10 days For 31 days in month: - Contract 1 from 01/07/2008 - 10/07/2008 = 10 days - Contract 2 from 11/07/2008 - 20/07/2008 = 10 days - Contract 3 from 21/07/2008 - 28/09/2008 = 11 days (calculate as 10 days from 21/07/2008 to 31/07/2008)

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Table 26-27 (Cont.) System Parameters

PAR Name	PAR Value	Description
Cash Advance To Disregard Onboard Expenses	1 / 0	1 – Cash advance available balance is not included onboard expenses.0 – Cash advance available balance is after deduct the onboard expenses.
Report ID For Onboard Expense		Onboard Expenses Report ID.
Report ID For SOE		Statement of Earnings Report ID.
Report ID For WRTS		Work / Rest Time Statement Report ID.
Return Bonus Pay code For Corporate Instruction		Use with DGS CMS.
Round Folio	Y / N	Y= Send only whole dollars for folio payoff until end of contract. N= Send pennies to folio
Show Owner	Y / N	Y= Owner percent field appears on the crew contract form (For ResidenSea user). N= Do not display (default)
Stock Code For OceanPay MT		Default Stock Code for MT Card. Populate in Cashless Payroll setup.
Tier 1 Percentage		To specify percent of Crew's First Tier Contribution. Used for Pension Plan to Employer Contribution.
Tier 2 Percentage		To specify percent of Crew's Second Tier Contribution. Used for Pension Plan to Employer Contribution.
To Disable Posting During Final Payout	1 / 0	1= Set UXP_A_POSTING = 0 during final payout. 0 =Allow crew posting after final payout
US Citizen TAX Pay code For Corporate Instruction		Use with DGS CMS.
Vacation Pay code For Corporate Instruction		Use with DGS CMS.
Cash Advance As Default Manual Payout	1 / 0	This parameter is OBSOLETED Replace by pay code with calculation method – A-NBCP.
Ending Payroll Alert	1 / 0	To prompt Ending Payroll Notification.

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Table 26-27 (Cont.) System Parameters

PAR Name	PAR Value	Description
Update BTD Total Upon System Date Change	1 / 0	1 – Enable 'Update Total' process when run system date change. 0 – Disabled
Cash Advance Disregards Onboard Expenses	1 / 0	1 – Enable to exclude onboard expenses into cash advance available amount 0 – Disabled
ByPass payout Settlement Integrity Check	1 / 0	1 -Allow to go through payout even difference between balance of Pay Addition and Pay Deduction 0 – Do not allow payout if balance of Pay Addition and Pay Deduction are different.
Default Pay Sheet Printing During Payout	1 / 0	1 - Default 'Print Pay Sheet' enabled in Payout screen0 - Default 'Print Pay Sheet' disabled in Payout screen.
Default Receipt Printing During Cash Advance	1 / 0	1 - Default 'Print Receipt' enabled in Cash Advance screen 0 - Default 'Print Receipt ' disabled in Cash Advance screen
Payout Crew member Even If Res Cancelled	1 / 0	1 – Allow cancelled reservation to do payout 0 – Do not allow cancelled reservation to do payout
The Month Where HSC-In-Excess Calculation Changes	YYYY-MM-DD	Specifies Any Day of The Month In Which HSC-In-Excess Calculation Changes.
Ignore Error Code In Fault Detection		Records With This Error Code Will Not Come Up In DGS-CMS-Related Fault Detection Screen.
Check All Payroll Paid Before Creating File	1 / 0	Check all payroll is being paid off before generate GL file. 1 – Enabled 0 – Disabled
Contract End Date Change Handling	1/2/3/4	Prompt Payroll Notification when change contract end date. 1=With Notification Removal, 2=Without Notification Removal, 3=User-Decide On Notification Removal, 4=Allow End Date Change Only On Date-Match.

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User Security

The table below lists the user security access rights to user the Payroll module.

Table 26-28 User Security

Access right	Function
640 Payroll	Payroll module
646 Reports	Reports module
643 Select Company	Allow access to Select Company menu item
647 Pay Periods	Allow to access the Pay Periods
648 Update Pay Units	Update Pay Units
649 Quick Posting	Quick Posting
650 Payout (Payout + Mark paid)	Payout
651 Activate Payroll	Activate Payroll
645 Generate GL File	Generate GL File for payroll
644 Update Contract End Dates	Update to new Contract End Dates for crew on Payroll
653 Edit Details	Edit Details
3251 Access Contract Type Details	Access Contract Type Details
3252 Access Pay Group Details	Access Pay Group Details
3253 Access Pay Position Details	Access Pay Position Details
3239 Access General Details	Access General Details
3240 Access Dependent Details	Access Dependent Details
3234 Access General Details	Access General Details
3249 Edit Cost Center Details	Edit Cost Center Detail
3235 Access Pay Addition Details	Access Pay Addition Details
3236 Access Pay Deduction Details	Access Pay Deduction Details
3237 Access Payout Details	Access Pay Out Details
3238 Access Benefit Details	Access Benefit Details
3232 Access Payroll Details	Access Payroll Details
3247 Perform Early Repatriation	Perform Early Repatriation
3222 Add Assignment	Add Assignment
3223 Edit Assignment	Edit Assignment
3224 Remove Assignment	Remove Assignment
3254 Edit Deduct Folio Setting	Edit 'Deduct Folio' Setting
3277 Edit Minimum Guarantee Amount	Edit Minimum Guarantee Amount
3220 un-masking of salary info	If Unchecked, Salary Amount Will Be Hidden
3225 pay payroll	Pay Payroll
3226 un-pay payroll	Un-Pay Payroll
3243 un-pay payroll for checked out crew	Un-Pay Payroll For Checked-Out Crew

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Table 26-28 (Cont.) User Security

Access right	Function
3241 undo acknowledge payout (do not allow to undo payroll if signature is captured)	Un-Do Acknowledged Payout
3229 cash advance	Cash Advance
659 Payroll companies	Payroll Companies
3221 Daily Currency exchange	Daily Currency Exchange
654 Pay codes	Pay Codes
655 Salary groups	Allow to access Salary Groups
656 Salary positions	Allow to access Salary Positions
658 contract templates	Contract Templates
4362 Scheduled contract changes	Scheduled Contract Changes
660 Tax types	Allow access to setup of tax types
4363 Add Pay code	Add Pay code
4364 Modify pay code	Modify Pay code
4365 Delete pay code	Delete Pay code
4407 Add pay code (admin)	Add Pay code
4408 Modify pay code (admin)	Modify Pay code
4673 Salary@Sea Transfer File Creation	This right grant access to Transfer file creation tab Cashless Payroll Option = 1 (Salary@Sea)
3244 General Maintenance	Grant access to the Cashless Payroll General Setup tab.
3246 Card ordering	Grant access to Card Ordering tab for Cashless Payroll Option = 0 (Ocean Pay)
3245 System Privilege	Grant access to Cashless Payroll on menu bar

Audit Trail

The Audit Trail handling tracks entries, modifications and removal of transactions performed by the user on specific tables. It also provides supporting entry histories when the data is purged.

Table 26-29 Audit Trail

Table	Action
ADT	Any payroll action such as Edit Contract, Remove Contract, Un-Pay Payroll
ADU	Any payroll update Example: *Add Pay code, Change Contract Date*
ADP	Pay Item deletion Example: *Void Pay Item, Un-Pay Payroll*
ADC	Contract deletion Example: *Remove contract*
ADS	Pay code deletion

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> **Note**
>
> You can customize a Crystal Report to generate the audit trail log.

Quick Posting Import File Format

The acceptable file format for import onto the SPMS Payroll System is a Comma Separated Value (CSV).

Table 26-30 Quick Posting File Format Fields

Column	Name	Contents
1	Record Type	The literal “POST”
2	ID Type	The type of crew identification entered in Column 3. Currently supported identification types include: “A” –RES_ACC value “C” –Payroll Contract ID (CTR_ID) “S” –RES_SHOREID value “I” –UXP_INTERNALID value “E” – SPMS UXP_C_EXTERNALID value
3	ID	The crew identifier.
4	Pay Code	The Pay code for this entry.
5	Units	The number of units (Hours/ Days) for this entry. Only used when Cal Method for the Pay Code is “PDAY” or “HOUR”.
	Rate	The per unit rate for this entry. Only used when the Calculation Method for the Pay Code is “PDAY” or “HOUR”.
7	Amount	The extended pay amount. For Calc Method “PDAY” and “HOUR”, this amount must equal column 5 times column 6.
8	Comment	30 characters max.
9	Not Used	
10	Currency Sign	Six characters max. Example: USD, EUR.

Below is the row separator format for the file:

Table 26-31 Quick Posting File Format Separator

Column	Contents
1	The literal “TOTAL”

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Table 26-31 (Cont.) Quick Posting File Format Separator

Column	Contents
2	Not Used
3	The total number of entries in this file
4	Not Used
5	Not Used
6	Not Used
7	The total of all payroll entries in this file
8	Not Used

The following validations are performed when importing the spreadsheet data:

- The ID must point to a crew member currently checked-in with an active contract.
- The Pay Code column must point to a valid and active Pay Code within the system.
- The Amount must be numeric and less than nine characters long, including the decimal.
- If the calculation method of the Pay Code is PDAY or HOUR then:
  - The Units must be numeric and less than nine digits long.
  - The Rate must be numeric and less than nine digits long including the decimal.
  - The multiplied Units of the Rate must be equal to the Amount.
  - The number of entries and the sum of the Amounts must match the information in the TOTAL record.

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27

GL Accounting

This section outlines the setup, file structures, and data extraction process for the Oracle Hospitality Cruise General Ledger (GL) Accounting Interface. The following information is essential prior to extracting accounting data.

- GL Codes
- Department Code Mapping

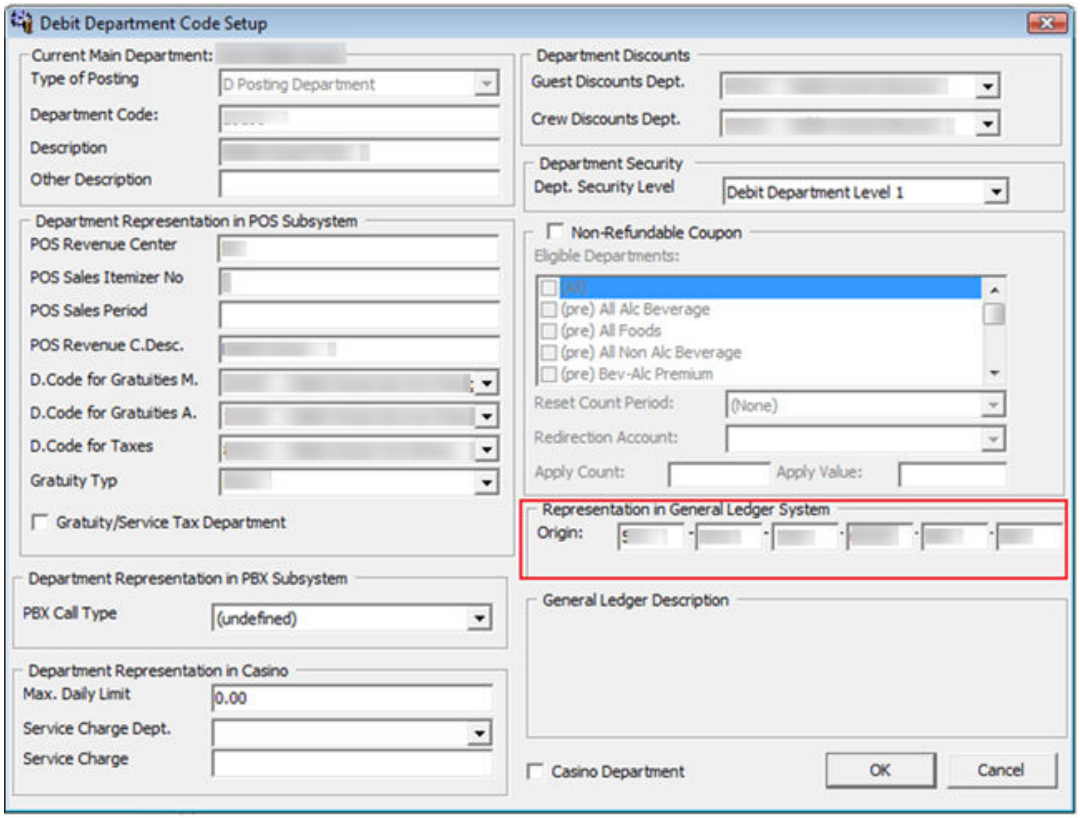
Configuring Interface Codes

Before you begin using the interface, you must map the GL Accounting Type and Department Codes with the correct GL Representation codes in the **Administration module, Parameter** settings.

1. Log in to the Administration module.
2. Go to **Administration, System Setup, Database Parameters**.
3. Expand the **Parameter Group, General Ledger** and select **GL Accounting Type**.
4. Insert the GL Format in the **Value** field.
5. Click **Apply** and then **OK** to apply the setting.
6. Go to **Administration, Financial Setup, Department Codes**.

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Figure 27-1 Debit Department Code Setup



7. At the Setup Department Codes window, select the sub-department code and click **Edit**.
8. At the Department Code Setup window, go to the Representation in General Ledger System section, enter the **GL Code** in the **Origin** field.
9. Click **OK** to save.

Generating GL File

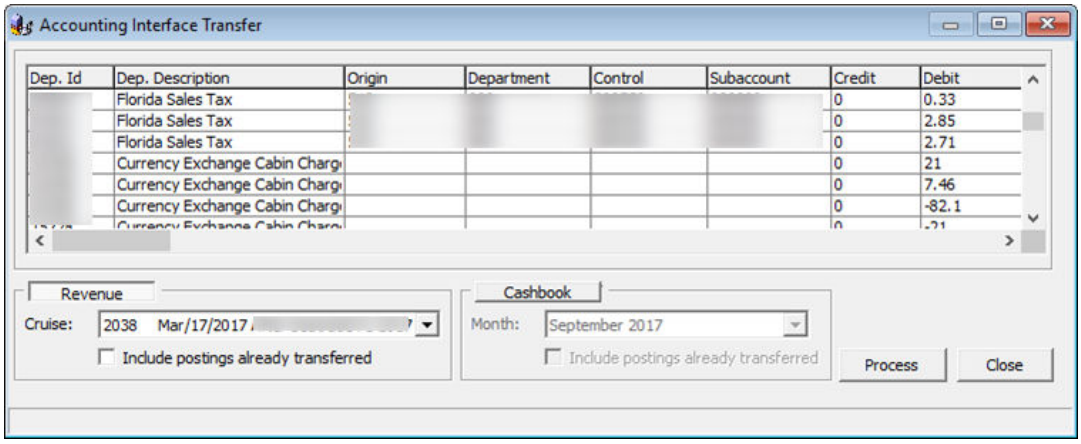
The GL file is generated from the OHC GL Accounting program. The file format varies depending on the value defined in **General Ledger, GL Accounting Type** parameter group. A Custom Accounting format using a customized script is available if you require more information in the GL transfer file. Contact Oracle Customer Support for more information.

Generic GL Accounting

1. Log in to the GLAccounting program.
2. Select **Generate File** from the **GL Transfer** option.
3. The Account Interface Transfer screen displays the revenue of the current cruise.
4. In the Revenue section, select the cruise from the **Cruise** drop-down menu.

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Figure 27-2 Accounting Interface Transfer



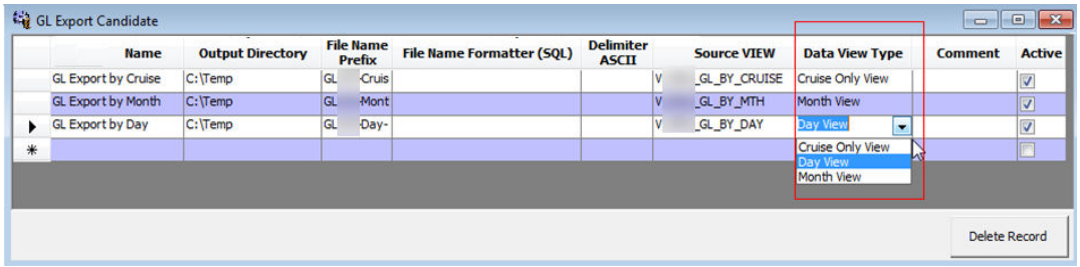
5. Click the **Process** button to generate the GL file.
6. Once the file generation completes, the system prompts a confirmation message and the saved file path is shown at the bottom left of the screen. Click **OK** to close the File Creation window and exit. This also dims the **Process** button.
7. To regenerate the file, select the **Include postings already transferred** checkbox to enable the **Process** button, and then repeat steps 3 and 4.

Custom GL Accounting

The Custom GL Accounting feature is enabled by setting the value field in the **General Ledger, GL Accounting Type** parameter to **Custom**. This setting changes the function within the GL Accounting Interface, and adds a Configurator option to the interface.

1. Log in to GL Accounting program and select **Configurator** from the option.
2. At the configuration screen, enter the **Name, Output, Directory, File Name Prefix, Source View and Data View Type**.

Figure 27-3 Custom GL Accounting Data Export



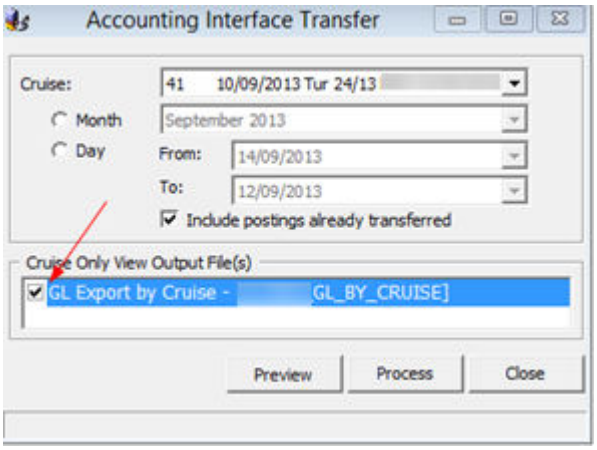
- The **Source View** refers to the custom view provided, depending on the customer requirement.
- The **File Name Prefix** must be different for the next record, otherwise, the system prompts a ‘Unique Constraint for PGE_I2’ error.
- The File Name Formatter (SQL) uses a SQL query to generate the file name.
- The Data View Type defines the view for each export type, by day, by month, or by cruise. For example,

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- **Cruise Only View:** GL Export by cruise only.
- **Month View:** GL Export by month within the cruise.
- **Day View:** GL Export by day within the cruise.

3. When generating the GL file from Generate GL File window, the output file format appearing in the Cruise Only View Output File section is based on the chosen selection - by Cruise, by Month or by Day.

Figure 27-4 Accounting Interface Transfer Data View Type



4. Click the **Preview** button to expand the view of records included in the file. The column prefix with “F_” is for output purpose only, and the column prefix with “D_” is for display purpose only.
5. Click the **Process** button to generate the GL file. The **Process** button remains enabled even after the file generation completes. This is to allow the generation of the next type of export file.

GL File Format

The following table describes the various file formats supported by the GL Accounting Interface.

Delimann GL Format

Table 27-1 Delimann Format Header Structure

Field Name	Data Type	Description
Record Type	CHAR	“1”
Transaction code	CHAR	/
Record Date (YYYYMMDD)	CHAR	Date of Summary
Others	CHAR	/
Ship ID	CHAR	Ship-ID
Date of Summary Accounting Date (YYYYMMDD)	CHAR	Date of Summary (same as Record Date)
Month of Summary Date	CHAR	Month of Summary Date

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Table 27-1 (Cont.) Delimann Format Header Structure

Field Name	Data Type	Description
Currency Code	CHAR	Currency Code
Record Number	CHAR	/
Reference Record Number	CHAR	Empty at the moment
End of Record Indicator	CHAR	/

Table 27-2 Delimann Segment Structure

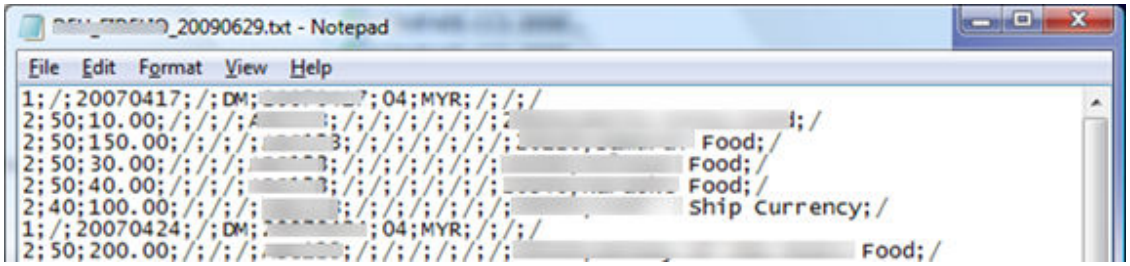
Field Name	Data Type	Description
Record Type	CHAR	“2”
Department Flag	CHAR	Credit Amount = “40”, Debit Amount = “50”
Amount in Currency Code	CHAR	Amount (Total/Day)
Tax Amount	CHAR	Empty
VAT Descriptor	CHAR	/ (Not Used)
Position Text	CHAR	/ (Not Used)
Cruise ID	CHAR	Cruise ID (SCR_ITN_ID)
GL Company Code (GL Original)	CHAR	Company code
GL Department Code (GL_DEPARTMENT)	CHAR	Department Code
GL Main Account (GL_CONTROLACC)	CHAR	GL Main Account code
GL Sub Account ID (GL SUBACC)	CHAR	GL Sub-Account ID
GL_MPM_ISSUE	CHAR	/
GL Material Code (GL_MATERIAL)	CHAR	/
Department ID	CHAR	Department ID
Department Description	CHAR	Department ID Description
End of Record Indicator	CHAR	/

Delimann Sample Output File

The following is the sample output file. The fields are separated by a semicolon (;) and each record is fed by line feed. The file name is saved in “XXXX_Application_Date” format.

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Figure 27-5 Sample Delimann Output File



AIDA GL Format

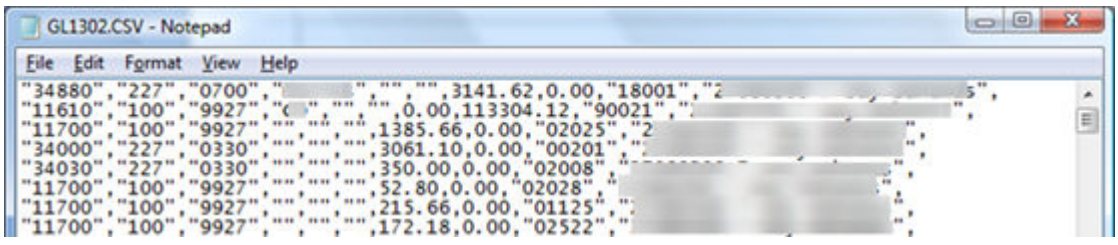
Table 27-3 Segment Structure for AIDA GL Format

Field Name	Data Type	Description
Company	CHAR	Acc GL Origin
Location	CHAR	Acc GL Dept
Center	CHAR	Acc GL Control Acc
Account	CHAR	Acc GL SubAccount
Analysis	CHAR	Acc GL Material
Intercompany	CHAR	Acc GL Mpm Issue
Debit	CHAR	Total debit amount
Credit	CHAR	Total credit amount
Department Code	CHAR	Department code (`DEP_ID`) or System account (`UXP_A_SYS`) when system account posts to department that are tagged with City Ledger (CL)
Description	CHAR	Cruise comment (`SCR_COMMENT`)

AIDA Sample Output File

The output file format is in a Comma Separated Value (CSV) with its columns separated by a comma (,).

Figure 27-6 Sample AIDA Output File



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28

Cashbook

The Cashbook module tracks all daily cash transactions. Access to the Cashbook is granted to departments and employees responsible for handling cash transactions.

Cashbook Setup

This section describes the procedure to configure the Cashbook Category and Transaction Codes.

Transaction Codes Setup

The Setup Cashbook Transaction Codes screen is comprised of two tabs:

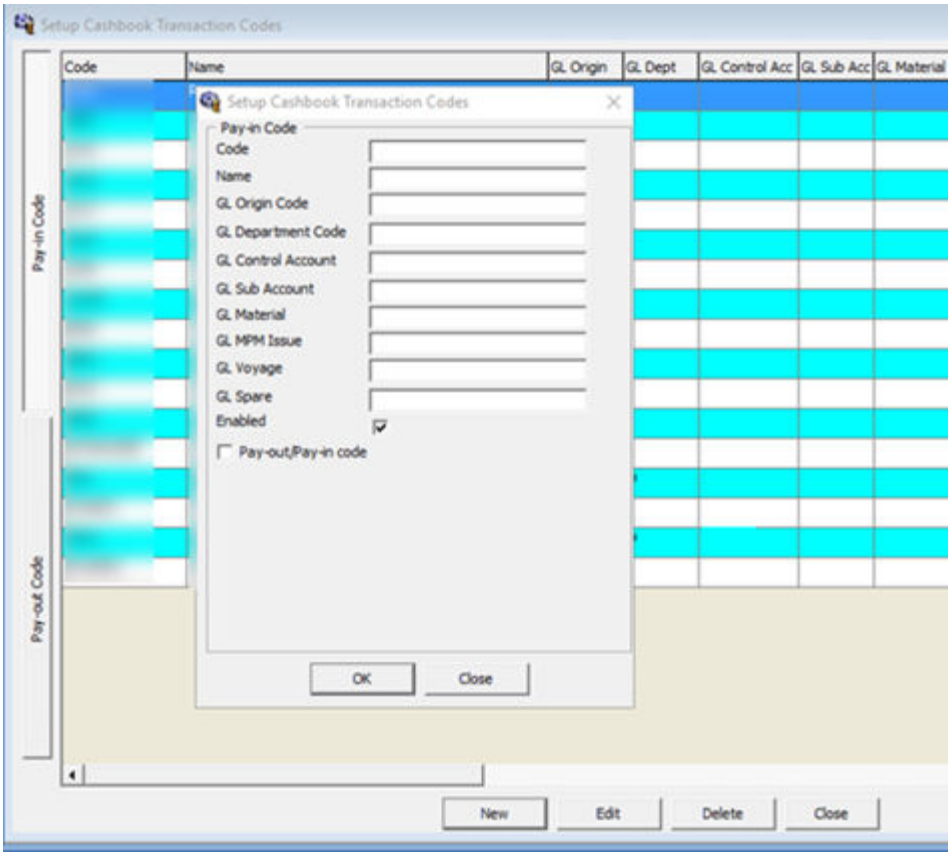
- Pay_in – Receiving Codes.
- Pay_out – Expenses Codes.

Setting Up Transaction Codes

1. At the Cashbook context menu, select **Setup Transaction Codes**.
2. To add Pay_in Transactions Code, select the **Pay-in Code** tab and click **New**.

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Figure 28-1 Cashbook Transaction Codes



3. At the Pay_in code form, **Code** and **Name** field, insert a unique transaction code.
4. You can randomly create the Transactions code as it has an option to link the code to its corresponding general ledger account.
5. By default, the **Enabled** checkbox is selected. Deselect the check mark to deactivate the code.
6. Select the **Pay_out/Pay_in code** checkbox to duplicate the code to Pay_out, or vice versa. This option depends on the **"Same Pay_in/Pay_out Codes"** parameter setting.
7. To delete the Transactions Code, select the code and click the **Remove** button. You are not allowed to delete a code that is linked to a transaction.
8. To edit the details, click **Edit**.

Cashbook Category Setup

You can delete the Cashbook using the **Remove** option. However, once you have a transaction linked to the Cashbook, deleting or removing is not allowed.

1. Log in to the **Cashbook module** and select **Setup Cashbooks** from the context menu.
2. At the Cashbook Setup screen, right-click and select **Add New**.
3. Enter a unique **Cashbook Code** and **Description**.
4. At the **Min. Balance** field, enter the minimum cashbook balance. This value is used to calculate the Balance Differences (Current Balance – Minimum Balance) in Cashbook Transactions.

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5. Select the **Default Currency** code for the Cashbook. This code is used to separate the currencies accepted (EUR, USD, SGD, and others) and record the cash available in each currency type.
6. The Pay_in/Pay_out codes refer to the above Transactions Codes. Select the corresponding code from the drop-down list, and click **OK** to save.

Scanning Device

The Cashbook module has a scanning function to store transaction documents. You must install a scanning device in **Management module, Options, Hardware** setup.

1. Log in to **Management module**, select **Options,** and click the **Document Scanner** tab.
2. Select the scanner from the **Select Scanner** drop-down list.
3. Select the **Set as Default** checkbox to make the scanner you selected the default scanner.
4. Select the **Enable Manufacturer Default Settings Dialog before Scan** checkbox to enable users to re-configure the scanning settings before the scanning process.
5. At the Scanner Setting section, select the relevant options from the drop-down list.
6. Select the **Auto Brightness** checkbox for the scanning effect and **Deskew** for straightening the image, and then adjust the brightness accordingly.
7. Click **OK** to save the setting.

User Access Right

Before you use the Cashbook module, you must enable the following **Cashier, User Full Cashier** parameter and grant users the following User Access Rights:

- Modules\Cashbook and its sub-category
- Modules\Consolidation Viewer –#852 – Cashbook
- General\Menu\Printing – #69 –Cashbook

Granting User Access

1. Log in to **Administration** module.
2. Select the **System Setup, Database** parameter from the Administration menu.
3. Enable the **Cashier, Use Full Cashier** parameter. The Cashier Function option and Cashbook Assigned option are enabled for selection in the User Security Access assignment.
4. Launch the Oracle Hospitality Cruise (OHC) Launch Panel and navigate to **Utilities, User Security**.
5. Grant the above user rights to the group.
6. Navigate to individual user access.
7. Under the **Various** section, Cashbook Assigned, select the **category** from the drop-down list.
8. In the **Cashbook** module, log in with a user that has Cashbook assigned, the Cashbook value always defaults to the Cashbook that was set up for that particular user.

For more information, see chapters *Administration* and *Launch Panel*.

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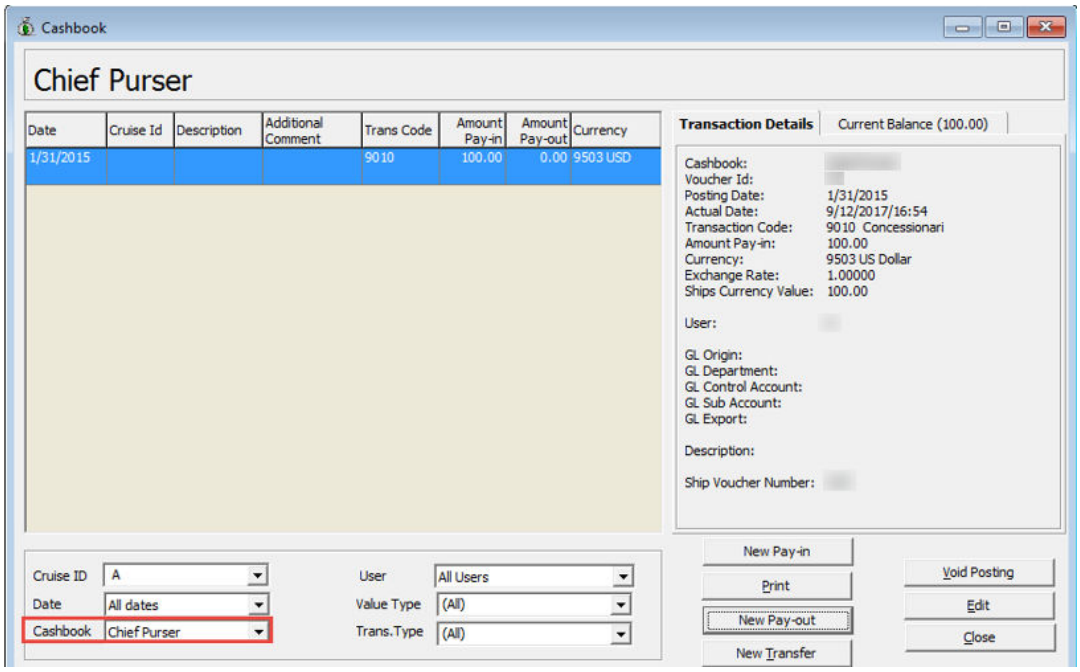
Cashbook Transactions

The Cashbook transactions window is comprised of three sections. The upper left side lists the transactions from all Cashbooks. The right panel consists of information tabs for the individual transactions and current balance, and the bottom section holds the function buttons and selection filters.

Recording Cashbook Transactions

1. At the bottom section of the Cashbook window, select a Cashbook from the drop-down list.

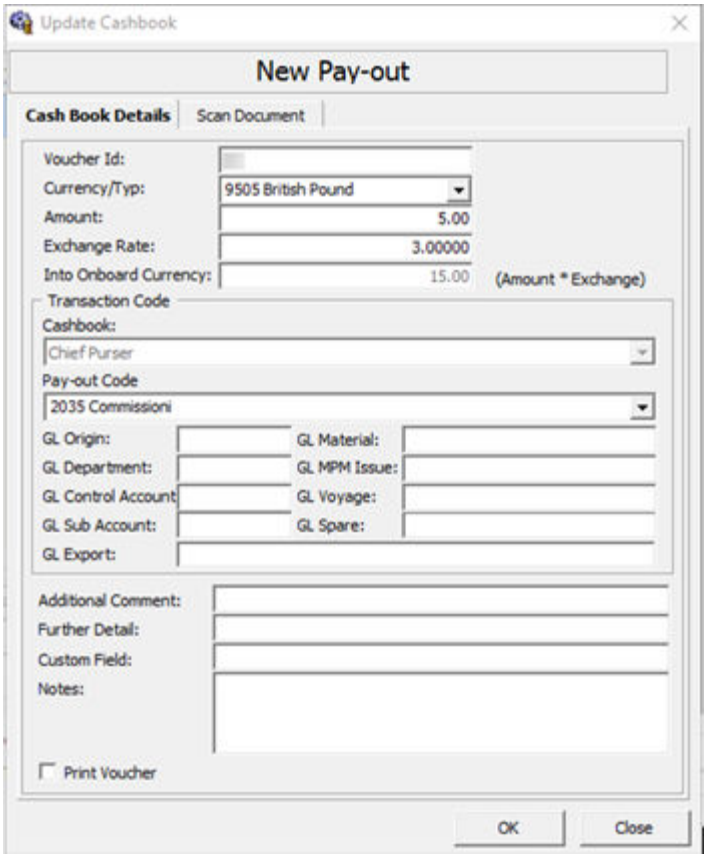
Figure 28-2 Recording Cashbook Transactions



2. Select a Transaction type to post, either a **New Pay-in** or **New Pay-out**.

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Figure 28-3 New Pay-out Update Cashbook



3. At the **New Pay-in** or **New Pay-out** entry form, select a currency code from the **Currency/Typ** drop-down list.
4. Enter the **amount** and the **Exchange Rate** if the selected currency type is not the ship base currency. Once the Exchange Rate is entered, the exchanged value updates automatically in the **Into Onboard Currency**.
5. Select the **Pay_in Code** from the drop-down list that correspond with the transaction. The General Ledger (GL) fields auto-populate according to the Transaction Code configuration.
6. At the **GL Export field**, enter the GL Export name.
7. Enter an additional info in the **Additional Comment, Further Details,** and **Custom** fields. These field labels are customizable in **Administration, Label Setup**.
8. Enter the additional remark in the **Note** field. This note will appear in the Transaction Details Description field.
9. Select the **Printer Voucher** checkbox to print the voucher receipt.
10. Go to the **Scan Document** tab, select one of the available options, and then click **OK** to add the transactions into the current cruise.

> **Note**
>
> All transactions entered are in current system date.

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Removing, Voiding or Editing a Transaction

You can delete a transaction by selecting it, and clicking the **Void Posting**. To edit a transaction, select the particular transaction and click **Edit**.

If you are voiding a posting, the system prompts a **Void Posting** reason. Select a reason from the list, and click **OK** to void the transaction.

Searching / Viewing Cashbook Transactions

At Cashbook Transaction, you can select from the available option to display the information.

1. Select the line items to display the **Transaction Details** tab.
2. Click the **Current Balance** tab to view the updated value of all currencies on hand. The Minimum Balance refers to the setting in Cashbook Setup. The Calculation formulas are:
   - Current Balance for the cruise = (Total Pay_in * Exchange Rate) - (Total Pay_out *Exchange Rate).
   - Balance Difference = Current Balance - Minimum Balance.
   - Running Balance = Total Pay_in –Total Pay_out for the selected cruise.
3. Click **Print** to print the voucher. Make sure you have uploaded the report REP_ID = “Voucher 2” before you print.

Balancing Cashbook

This section describes the Cashbook auto-balance / brought forward process when changes are made to the Cashbook System Cruise Change. To auto-balance the Cashbook or bring forward the balances properly, the **Cashbook Current Cruise** parameter must have a valid (SCR_ID). This is set up in **Administration module, System Setup, Parameter** . See *Section 1 — Parameters*.

Balancing Cashbook at System Cruise Balance

The Cruise Change function is visible in the Cashbook module once the above parameters are enabled.

1. Click the **Cruise Change** function to open the Cashbook System Cruise Change window.
2. Click **OK** to confirm the cruise change.

Figure 28-4 Cashbook System Cruise Change



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3. At the confirmation prompt, select **Yes** to proceed or **No** to return to the previous screen.
4. Once the cruise change is completed, click **OK** to close the dialog box.
5. To view the Cruise Balance for Pay-out/Pay-in after making changes to the Cashbook System Cruise , go to the Cashbook Module.
6. At the Transaction Details tab, the Transaction Code carries a Cruise Balance.
7. If the defined Cashbook System Cruise is beyond the current system cruise, the **No Cruise Change** warning dialog box opens.

Resetting Voucher Numbers

The Cashbook voucher number increases when an entry is added and is listed in the Transaction Details tab. You can choose to reset the voucher number manually or automatically using the parameter setting.

Resetting Voucher Number Manually

1. On the Cashbook menu, click **Reset Ship's Voucher No.**
2. On the Cashbook Voucher Reset prompt, select **Yes** to confirm. The Reset date is indicated on the confirmation prompt in DD-MM format per date defined in the parameter.

Resetting Voucher Number Automatically

To automatically reset the Ship's Voucher No, enter the DD-MM date format into the **Cashbook, Cashbook Voucher Reset Data** parameter. Click **Reset Date** to reset the voucher number to one.

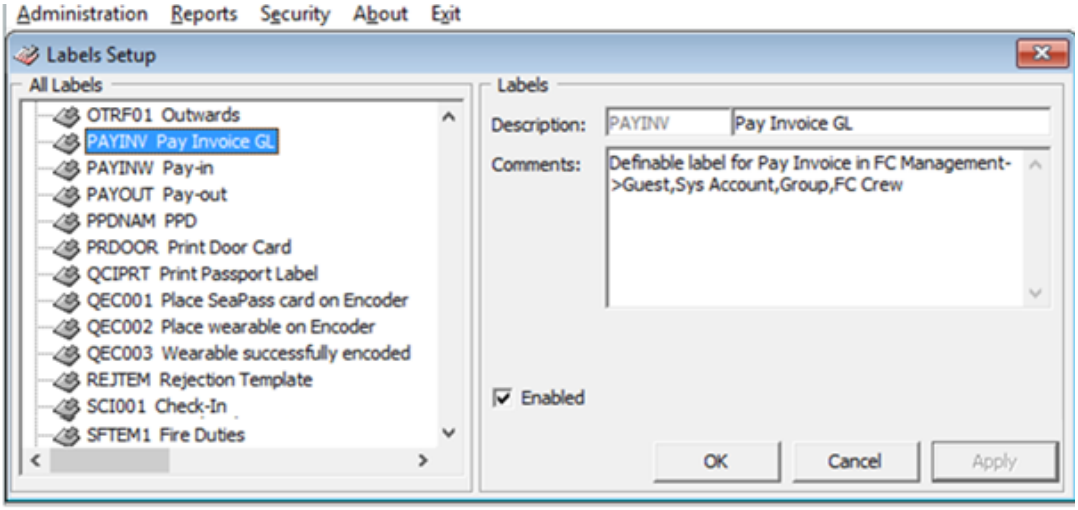
Label Setup

You can use a Customized label to further identify a transaction or add comments to an entry.

1. Log in to the **Administration** module.
2. Select **System Setup, Labels Setup** from the Administration option.
3. At the **All Labels Listing**, select **PAYINW Pay Invoice**, change the **Label's Description** field to your description, and click **OK**.
4. You can also customize the **Pay-in, Additional Comment, Further Detail**, and **CSB Custom Field** labels using the above same steps.

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Figure 28-5 Labels Setup for Pay Invoice and Pay-In



Parameters

This section lists the Parameters available to Cashbook module. Setting these parameters will alter the program behavior. Please consult Oracle Customer Support for further clarification before proceeding.

Table 28-1 PAR_GROUP Cashbook

PAR Name	PAR Value	Description
Cashbook Balance Bring Forward Enabled	<0,1>	0 – Disable cash book balance to bring forward. 1 – Enable cash book balance to bring forward.
Payout Balance Code	<Pay_out Code>	A valid Pay_out code (TRC_CODE) must be set up in the Transaction Code Setup function. The code is used to balance the current cruise and create a new brought forward balance in the next cruise.
Payin Balance Code	<Pay_in Code>	A valid Pay_in code (TRC_CODE) must be setup in the Transaction Code Setup function. The code is used to balance the current cruise and create a new brought forward balance in the next cruise.
Cashbook Current Cruise	<Current Cruise ID>.	0 – Regular system cruise number to be used >0 – Present current cruise number used by cashbook system (SCR_ID).
Read Only Other Person Cashbook	<0,1>	0 – Disable. 1 – Enable.

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Table 28-1 (Cont.) PAR_GROUP Cashbook

PAR Name	PAR Value	Description
Credit Voiding	<0,1>	0 – Voiding with minus amount on same account side.
Same Payin/out Codes	<0,1>	0 – Not the same pay_in/ pay_out codes. 1 – Same pay_in/-pay_out codes
Cashbook Voucher Reset Date	<dd-mm>	The date when the Cashbook Voucher No. will be reset to 1 in “DD-MM” format
Cashbook Lock Status	<0,1>	0 – Release 1 – Locked
Enable Currency Denomination Tracking	<0,1>	0 – Disable 1 – Enable

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Casino

The Casino module is a comprehensive program designed to manage the casino services, track transactions, and generate detailed analytical reports.

SPMS Parameters

This section lists the parameters available to the Casino module. They are accessible in Administration module, System Setup, Parameter.

Table 29-1 PAR_GROUP Casino

PAR Name	PAR Value	Description
Additional Auth Amount Checking	<value>	This setting prompts a reminder message to Casino staff to request further credit card authorization by value defined and does not trigger an authorization request. Staff is required to contact the Pursers for incremental authorization to be performed on the passenger's credit card.
Allow Posting For Cash Payment	<value>	1 - Allow postings for accounts that only have Cash registered as payment type. 0 - Do not allow postings on these accounts. This is to ensure that only passenger accounts that have a credit card registered on their account are allowed to charge the Casino postings to their onboard account. The parameter is accessible through **OHC Casino, Setup, Parameters**.
Apply Master Casino Department Limit	<value>	A - System Account, P - Pax, C - Crew, G - Group, Z - Gift Card
Check Casino Credit Limit on Payer	<value>	1 – Check the Casino Limit on buyer and payer. 0 – Check the Casino Limit on buyer only.

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Table 29-1 (Cont.) PAR_GROUP Casino

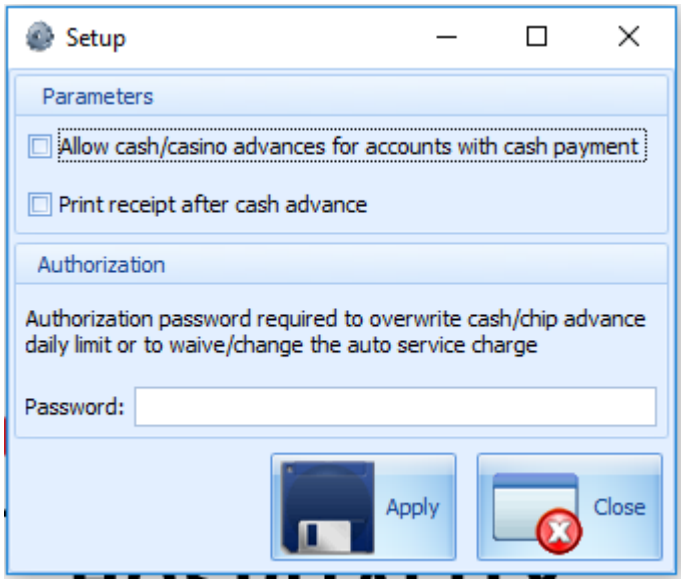
PAR Name	PAR Value	Description
Master Casino Department Limit	<value>	<=0 – Use Casino Main Department Credit Limit. >0 – Use this Casino Department Limit. If there are multiple main department codes available for Casino postings, the value specified here allows you to set a total credit limit for all Casino Department codes combined.
Min Age For Casino Posting	<value>	Minimum age allowed for casino posting.
Multiple Receipt Copies	<value>	Prints the Cash/Chip Advances receipts posted in Casino module. 1 - Print two copies. 0 - Print one copy only.
Overwrite Limit Password	<value>	Password to overwrite daily limit for cash/chip advance postings. Directly Set Password through OHC Casino instead of the Administration module as the password will be encrypted.
Print Receipt	<value>	1 - Print receipt after cash/chip advance posting. 0 - Do not print receipt. Accessible through **OHC Casino, Setup, Parameters**.
View Onboard Invoice	<value>	1 – Allow to view onboard invoice. 0 – Do not allow to view onboard invoice.

Accessing the Setup Page

You can access the Setup function from the Home of the Casino module.

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Figure 29-1 Casino's Setup Screen



At the Setup window, select the necessary checkboxes to enable the parameters or enter the overriding password in the Password field and click **Apply**.

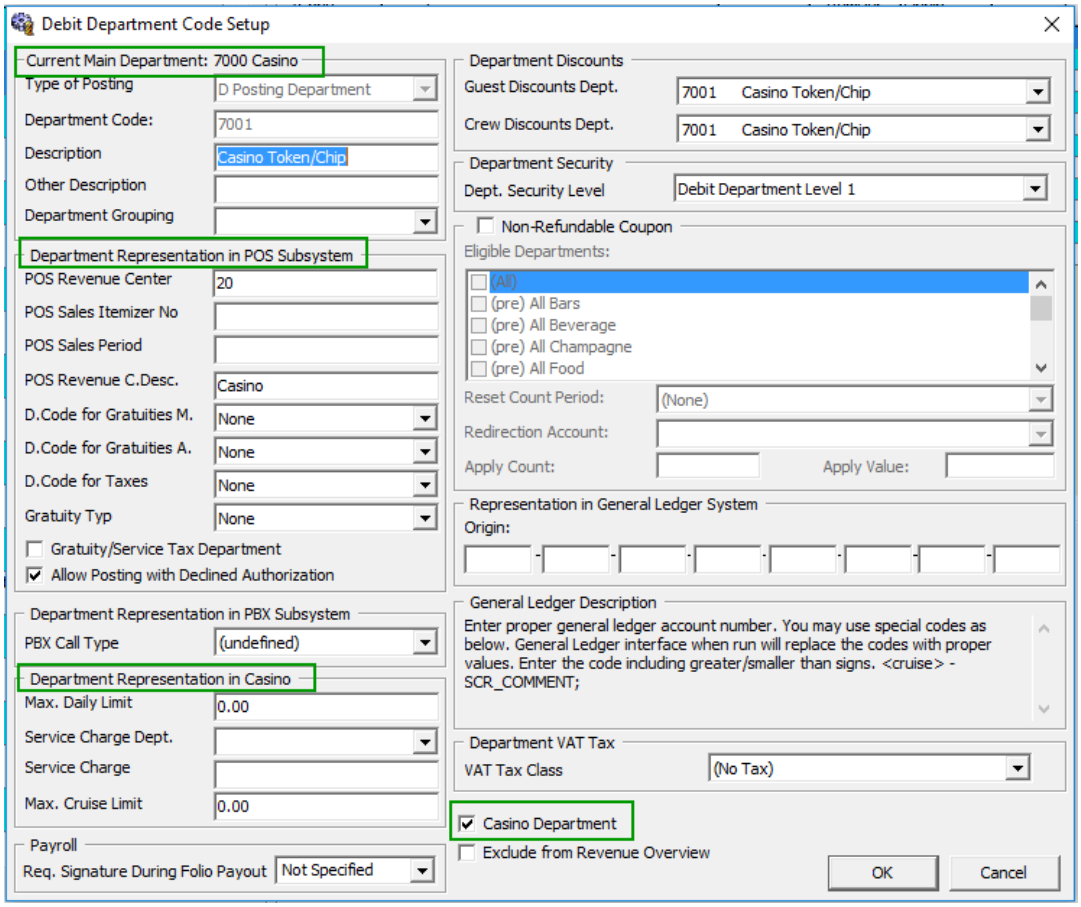
System Configuration

This section describes the department code setup within the Administration module.

1. Log in to the **Administration module** and select **Financial Setup, Department Setup** from the drop-down list.
2. Navigate to the **Debit** tab and click **New** to create a Sub-Department code.

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Figure 29-2 Department Code Setup



3. At the **Current Main Department** section, enter the information for the Casino posting department such as Type of Posting, Department Code, and Description.
4. At the Department Representation in POS Subsystem section,
   - Enter a two digits **POS Revenue Center** number.
   - Enter the Casino's description in the **Pos Revenue C.Desc** field.
   - Select the **Allow Posting with Declined Authorization** checkbox if you allow posting to a declined authorization account.
5. At the Department Representation in Casino section:
   - Enter the daily maximum limit allowed in the **Max. Daily Limit** field.
   - Enter the maximum cruise limit in the **Max. Cruise Limit** field.
6. Select the **Casino Department** checkbox to confirm that the payment type is a Casino department code.
7. Click **OK** to save the form.

Receipt Setup

The system can produce a payment receipt, which would require setting up a report template. A Standard Casino receipt template is available in **Administration module, System Setup, Report Setup, _Receipts Group** and **Casino Report**. Contact Oracle Customer Support if you would like to configure a customized receipt format.

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Hardware Setup

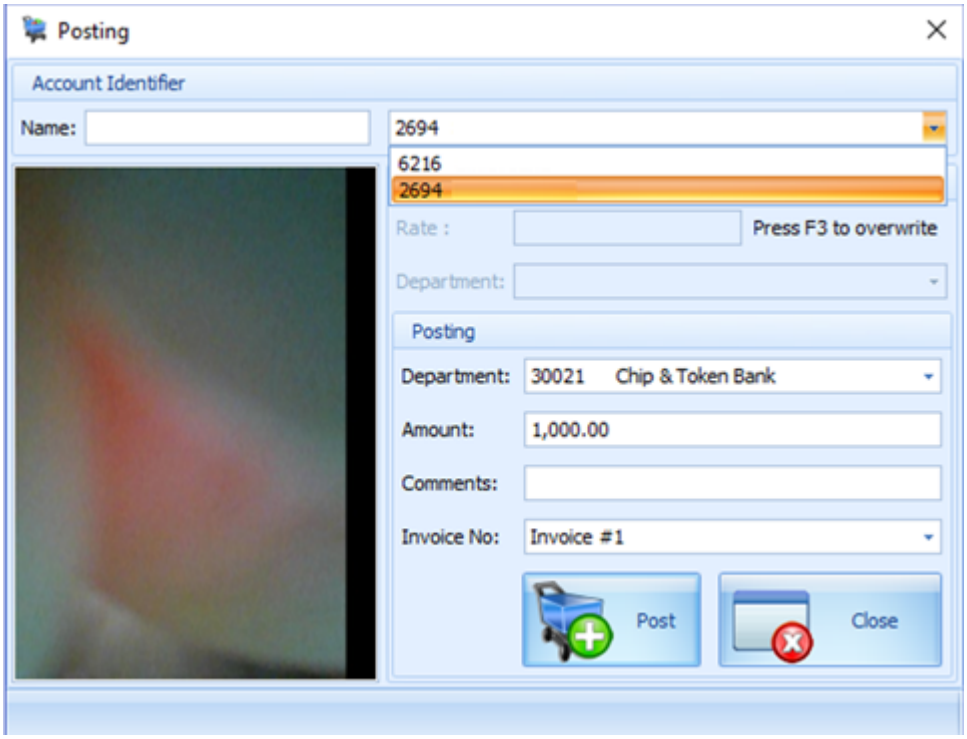
You can use a default printer to print the report from the SPMS program. See the **Management Module, Options** section on how to set up the printer.

OHC Casino

This section describes the steps to perform a posting.

1. Run the OHC Casino program.
2. Click the **Posting** button at the ribbon bar.
3. At the **Account Identifier** section, enter a name or cabin number to search for an account.

Figure 29-3 Posting Screen



4. At the Posting section:
   - Select the **Casino Department**.
   - Enter the **posting amount** and **comments**, if any.
   - Select the **Invoice number** to post.
5. Click **Post** to confirm the posting and print a receipt, if **Casino, Print Receipt** parameter is enabled.
6. The posted transaction appears in the **Management, Guest Handling, Invoice tab**.

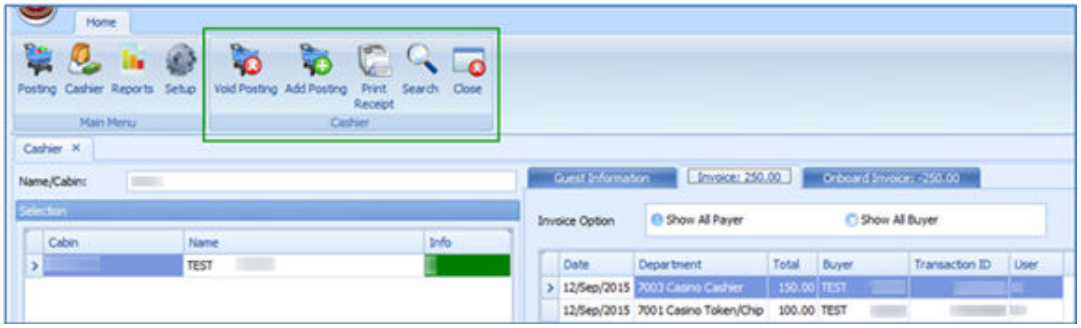
Cashier

This section describes the steps to retrieve the Casino's posting for the guest.

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1. At the application, click the **Cashier** button on the ribbon bar.
2. At the **Name/Cabin** field, enter a name or cabin number and select the account from the search results.
3. Go to the **Guest Information** tab to view the general information of the guest.
4. Click the **Invoice** tab to view the Casino's posting of the guest. This also enables the **Cashier** button at the ribbon bar, allowing you to perform posting from this.

Figure 29-4 Cashier Function



5. To view other postings of the same guest, go to **Onboard Invoice** tab.

Reports

This section describes the report usage for the Casino module.

1. At the Main Menu section, click the **Reports** button.
2. Enter a report in the **Search Report** field or select the report from the tree view.
3. There are several methods of printing the Report:
   - Print by sending the report to a printer.
   - Export (supported format: rpt, pdf, xls, doc, rtf)
   - Custom Excel export

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Norwegian Tax Handling

This section describes the Norwegian Fiscal Enhancement implemented in Shipboard Property Management System (SPMS). Product used in the Norwegian market must comply with:

- Norwegian Tax Authority's Cash Register Systems Act (CSRA), and
- Norwegian Tax Authority's Cash Register Systems Regulation (CRSR).

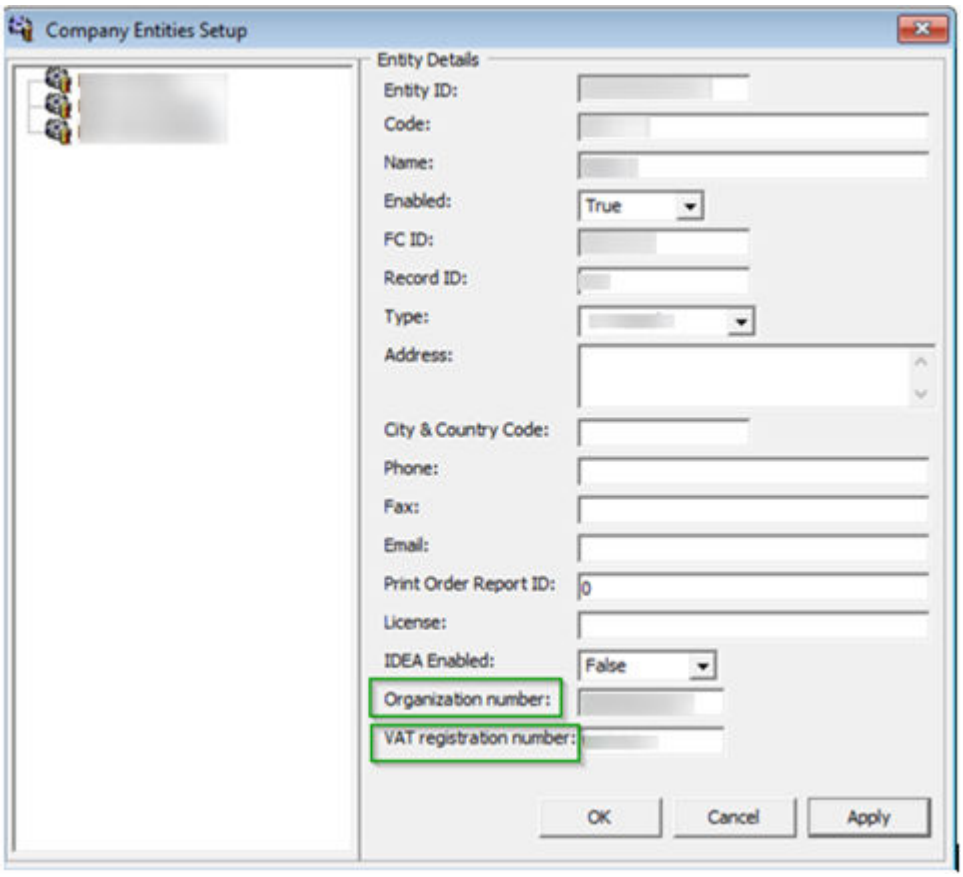
System Configurations

Below are the changes introduced for the Norwegian Fiscal Enhancements in order to meet the requirements specified by the Norwegian Tax Authority.

Company Details

You must set up the Company entities for the company information to be shown on the report.

Figure 30-1 Company Entities Setup



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1. Log in to the Administration module and select **Administration**, **System Setup**.
2. Select **Company Entities Setup** and enter the value for two new entities as follows:
   - **Organization number:** Organization number from Register Centre or other relevant government authority.
   - **VAT registration number:** The Company's Value Added Tax (VAT) number. This is the unique number from the Register Centre.

Printer Configuration

A printer set-up is needed to print the required receipts such as Sales Receipt, Delivery Receipt, and Return Receipts.

1. From the **Management module**, **Options**, select the **Hardware** menu.
2. Select **Report Printers** as **Receipts** and select the printer from the drop-down list.
3. Click **Apply** to save and exit the configuration screen.

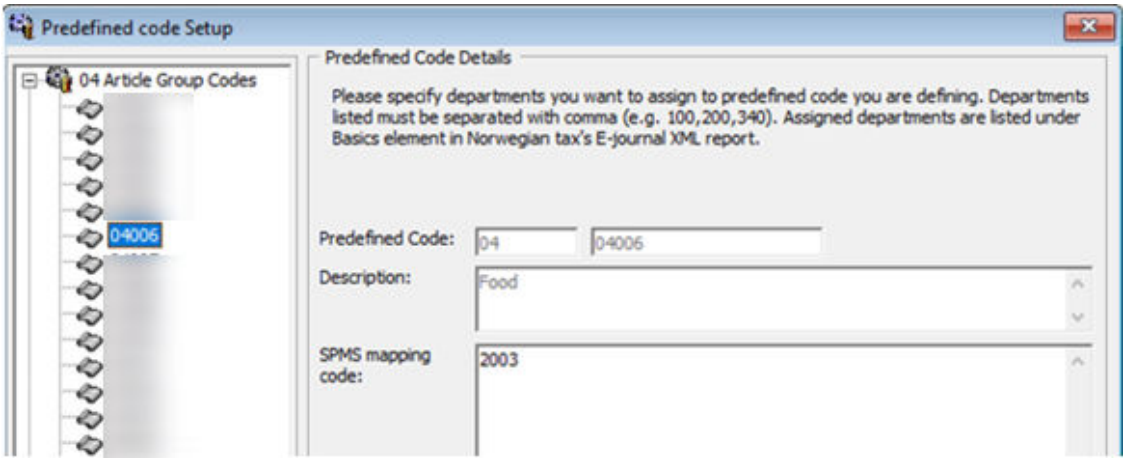
Predefined Code Mapping

In the Norwegian E-Journal Report, it is necessary to display the standard predefined code instead of a system code, for example, the standard predefined code for VAT rate and main department. Therefore, code mapping between the standard predefined code and the system code is required. The Predefined Code Mapping button is enabled when the PAR Use Norwegian Fiscal Requirements is enabled, and you have the authorization to access this function.

To map the standard predefined code to the system code, log in to the Administration module and click the **Administration, System Codes** button, and then click the **Predefined Code Mapping** at the top of the menu.

Standard Predefined Code 04 — Article Group/Department Codes

Figure 30-2 Sample Predefined Article Group



This code is used to configure the system debit department code. In the screen example above (Figure 2–2), the system debit department code 2003 for food is mapped to standard predefined code 04 and predefined ID 04006.

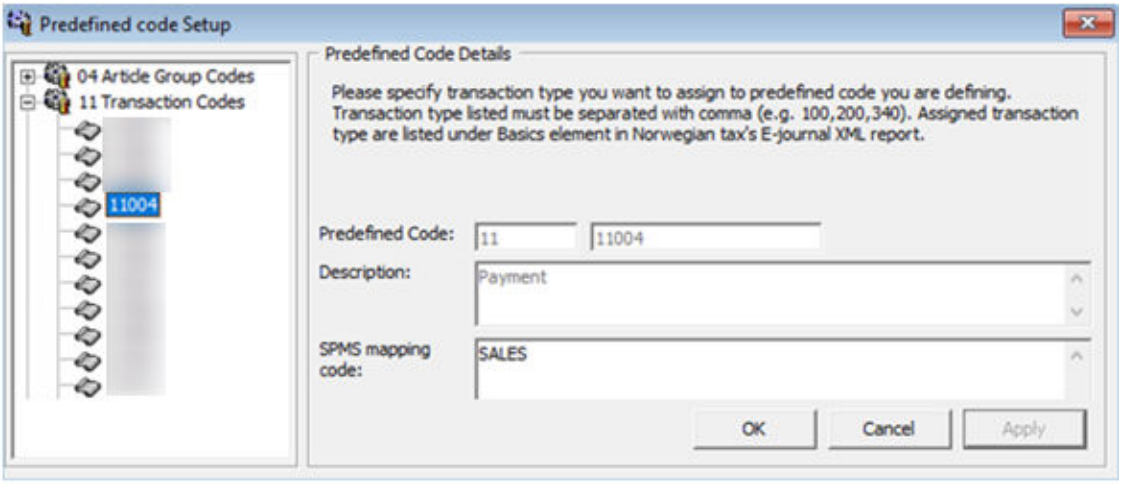
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The report displays this standard predefined code in <basicType> and <predefinedBasicID> under <basics> element.

Standard Predefined Code 11 – Transaction Codes

This code is used to configure the system transaction code. The payment transaction code **SALES** is mapped to the standard predefined code 11 and predefined ID 11004 as shown in the figure below.

Figure 30-3 Sample Predefined Transaction Codes



There are two categories of transaction code in the system:

Transaction code for Point-of-Sales (POS) record. This appears in <lineType> under <ctLine> element on the report. There are five types of transaction codes for POS record. You **must** follow the exact system transaction code per the following and configure it into the user interface to avoid unmapped data and incorrect information being displayed.

- POST (add posting)
- SALES (payment)
- REFUND (return payment)
- DIS (discount)
- VOID (void posting)

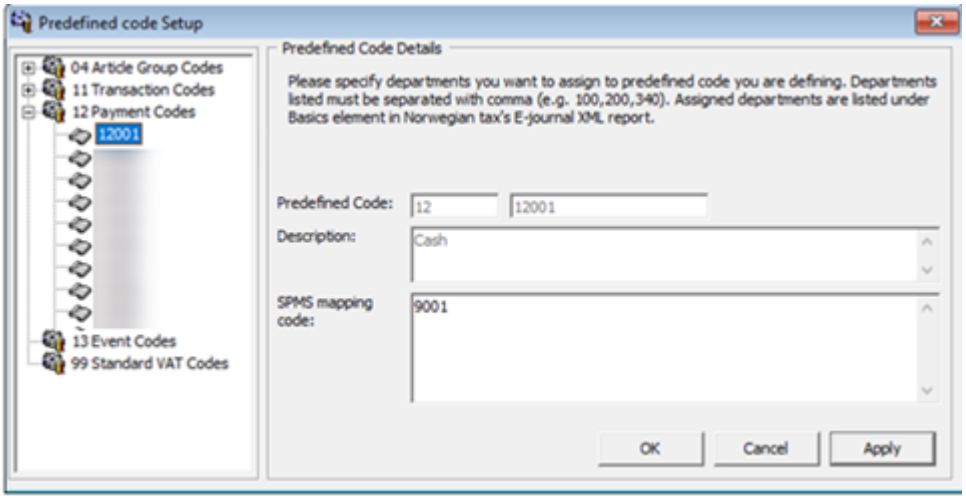
Transaction code for receipt type. This appears in <transType> under the <cashtransaction> element on the report. There are four types of transaction codes for receipt type. You must follow the exact system transaction code shown below to configure it into the user interface.

- SALES (Sales Receipt)
- RETURN (Return Receipt)
- PROFORMA (Pro Forma Receipt)
- DELIVERY (Delivery Receipt)

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Standard Predefined Code 12 — Payment Codes

Figure 30-4 Sample Predefined Payment Codes

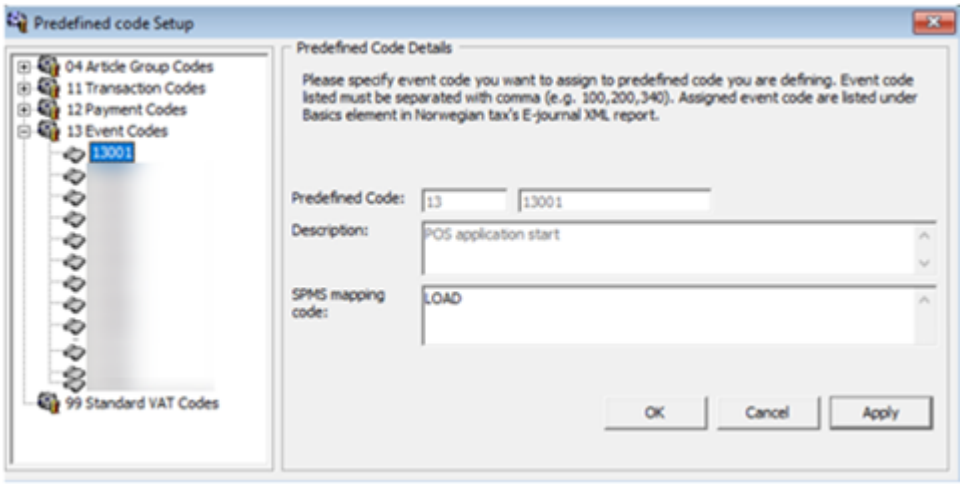


This code is used to configure the system credit department code or payment code. In the example above, the credit department code 9001 for cash is mapped to standard predefined code 12 and predefined ID 12001.

This appears in `<basicType>` and `<predefinedBasicID>` under `<basics>` element on the report.

Standard Predefined Code 13 — Event Codes

Figure 30-5 Sample Predefined Event Codes



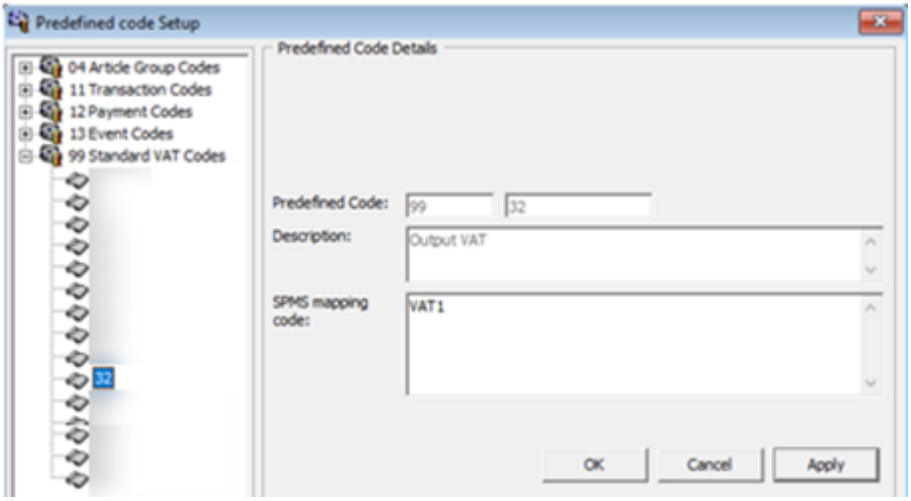
This code is used to configure system event code. In the below example, the system event code **LOAD** for application starting is mapped to standard predefined code 13 and predefined ID 13001.

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This appears in <event> under <cashregister> element on the report.

Standard Predefined Code 99 – Standard VAT Codes

Figure 30-6 Sample Predefined VAT Codes



This code is used to configure system VAT code. In example above, the system VAT code **VAT1** is mapped to standard predefined code 99 and predefined ID 32.

This is displayed in <standardVatCode> under <vatCodeDetails> element on report.

Key Pair Management for Digital Signature

The Norwegian Tax Authority mandates that sales transactions must be digitally signed. The Norwegian Tax Authority has chosen the cryptographic function: RSA-SHA1-1024, based on asymmetric encryption where a key pair of a private key and a public key is required.

To perform key management, the key pair can be self-generated and self-signed. This means the key pair can be generated from any machine and anywhere. The public key submitted to the Norwegian Tax Authority signifies the valid key pair recognized by the Norwegian Tax Authority. For each Cruise Operator, one key pair is sufficient regardless of the number of the Sales Registers is used. The Cruise Operator is FULLY responsible for the generation and management of the key pairs.

For Norwegian Tax Authority audit purpose, the Cruise Operator is responsible in submitting the key pair of the public key used in digital signing. When the key expires or breached, the Cruise Operator must re-generate a new key pair and update the new key pair in SPMS. The new public key shall be resubmitted to the Norwegian Tax Authority.

See Digital Certificate Requirement.

Creating Self-signed Certificate

Listed below are the tools that you can use to generate a self-signed certificate.

1. Using the OpenSSL libraries.
2. Using the MakeCert.exe tool distributed in the Windows SDK.
3. Using the PowerShell pkiclient cmdlet.

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Open SSL

The OpenSSL method is recommended if you work with multiple platforms (Linux, Mac, Windows, etc.). OpenSSL can be installed on most of the operating systems OS.

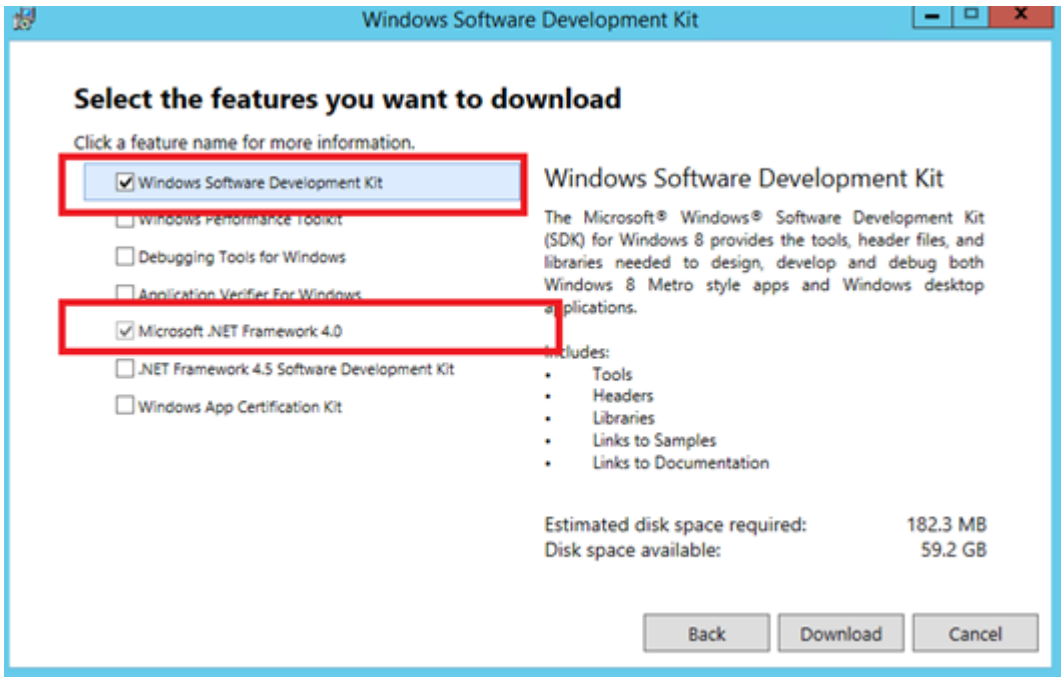
Download and install the OpenSSL toolkit from: https://www.openssl.org/.

MakeCert

This method is recommended if the target machine is Windows 10 and Windows Server 2012. Download and install the Windows 10 SDK from https://developer.microsoft.com/en-us/windows/downloads/sdk-archive.

Start the installation and select the option as shown in below figure.

Figure 30-7 Windows Software Development Kit Options



This example creates a self-signed certificate for the purpose of digital signing that would be stored in the Windows Certificate Store "`cert: \LocalMachine\My`". Right-click the **Command** prompt and select to run in **Administrator mode**, and run the command below.

```
cd "C:\Program Files (x86)\Windows Kits\8.0\bin\x86"
MakeCert -a <name> -len 1024 -n "CN=< CERTIFICATE NAME>" -pe -r -sky
Signature -sr LocalMachine -ss My
```

This generates a new key pair for the RSA-SHA1-1024 cryptographic function with the certificate subject being set as the name defined in `<CERTIFICATE NAME>`.

- The "-pe" option allows the private key to be exportable. You need this as the key pair will be used by each Sales Register.
- The "-r" option creates a self-signed certificate.

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- The "-sky Signature" option indicates that this key pair is meant for digital signing.
- The "-sr LocalMachine" option makes the Windows store the key pair under the `HKEY_LOCAL_MACHINE` registry location certificate store.
- The "-ss My" option is the name of the certificate store that stores the generated certificate that contains the key pair.

PowerShell New SelfSigned Certificate cmdlet

This method is recommended if the target machine is Windows 10 and Windows Server 2016. The function and storage of the certificate for this tool is similar to MakeCert. Right-click the **PowerShell** prompt and select **Run in Administrator** mode, and then run the command below.

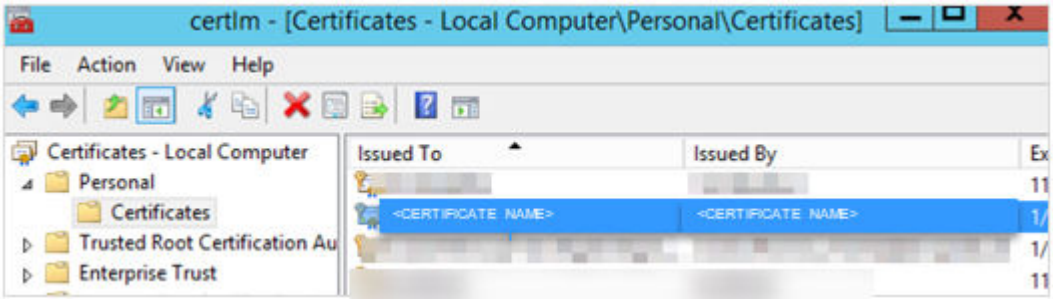
```
New-SelfSignedCertificate -CertStoreLocation "cert:\LocalMachine\My" -Subject
<"Certificate Name"> -HashAlgorithm SHA1 -KeyAlgorithm RSA -KeyLength 1024 -
KeyExportPolicy Exportable -KeySpec Signature -KeyUsage CertSign -Type
CodeSigningCert -NotAfter $([datetime]::now.AddYears(5))
```

Export Self-signed Certificate

After generating the digital signing certificate, you will need to distribute the certificate to whichever machine performs the digital signing task. As the certificate contains a private key, you must provide a password to secure the file after the certificate is exported to the local file system. You are responsible in safeguarding the certificate along with the password used to lock it. The steps below will guide you on how to export the digital signing certificate to a password secured PFX file.

1. At the **Search Windows** prompt, type in **Manage computer certificates** to open the "certlm" console.
2. At the tree view on the left panel, expand the **Personal** folder under "**Certificates - Local Computer**, and then click the **Certificates** folder.
3. At the **Certificates** folder, look for the certificate issued to "Cruise Digital Signature" on the right panel.

Figure 30-8 Certificates Repository on Local Computer



4. Double-click to open the certificate and ensure it contains the private key. You should see the golden key icon with this message: "You have a private key that corresponds to this certificate" under the **General** tab.
5. Right-click the certificate on the right panel. You will see a prompt.
6. Select **All Tasks**, and then click **Export** to launch the Certificate Export Wizard.
7. Click the **Next** button to continue.

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8. At the Export Private Key screen, select the **Yes, export the private key** radio button option, and click the **Next** button.
9. Key in a password to secure and prevent users from opening the PFX certificate.

> **Important**
>
> The Cruise Operator is responsible in remembering the password used.

10. Select the location of the file to export and click the **Next** button again.
11. Click the **Finish** button and now, you should have the PFX certificate located in the export location selected.

Import Key Pair

Before you import the key pair, ensure that you have a PFX certificate available on the machine and the certificate password. To import, follow the steps below.

1. Repeat steps 1 – 2 of Export Self-signed Certificate.
2. Right-click the Certificate folder and select **All Tasks,** then **Import...** to start the Certificate Import Wizard.
3. Click the **Next** button to continue.
4. At the **File to Import** screen, browse to the location of the PFX file to import and click the **Next** button again.
5. Key in the password to unlock the PFX certificate. *Do not* select the **"Mark this key as exportable."** option. This is to ensure maximum confidentiality.
6. Click the **Next** button and then click the **Finish** button. Now, you should have the key pair saved in the Windows certificate store.

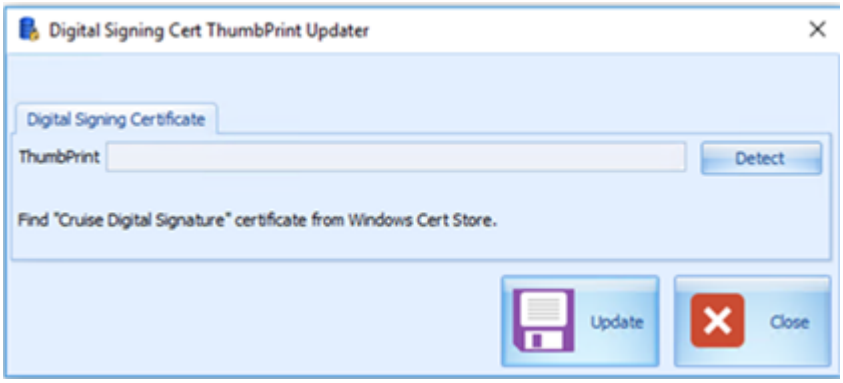
Managing the Key Version in SPMS

Although the key pair is stored in the Windows certificate store, SPMS must manage the key version. Every new key pair used in SPMS will be recorded in the KEY table of the SPMS schema.

1. Log in to the **OHC Tools** module.
2. At the ribbon bar, click the **Update Cert ThumbPrint**.
3. At the Digital Signing Certificate window, click **Detect** for the program to look up the certificate name "`< CERTIFICATE NAME>`" and obtain the ThumbPrint of the public key.

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Figure 30-9 Digital Signing Cert Thumbprint Updater



4. Click **Update** to store the key in the KEY table.

Export Public Key

The Norwegian Tax Authority requires the public key to audit the digitally signed sales transactions. As a requirement, the Cruise Operator must be able to provide the public key in the form of base64 encoded X.509 certificate.

1. Repeat steps 1 – 7 of Export Self-signed Certificate.
2. Select the **“No, do not export the private key”** radio button and then, click the **Next** button.
3. Select the **"Base-64 encoded X.509 (.CER)"** radio button and then, click the **Next** button.
4. Select the location of the file to export and the click **Next** button again.
5. Click the **Finish** button. Now, you should have the CER certificate located in the export location selected.

With the base64 encoded CER certificate, you can now submit the public key to the Norwegian Tax Authority.

IIS Configuration

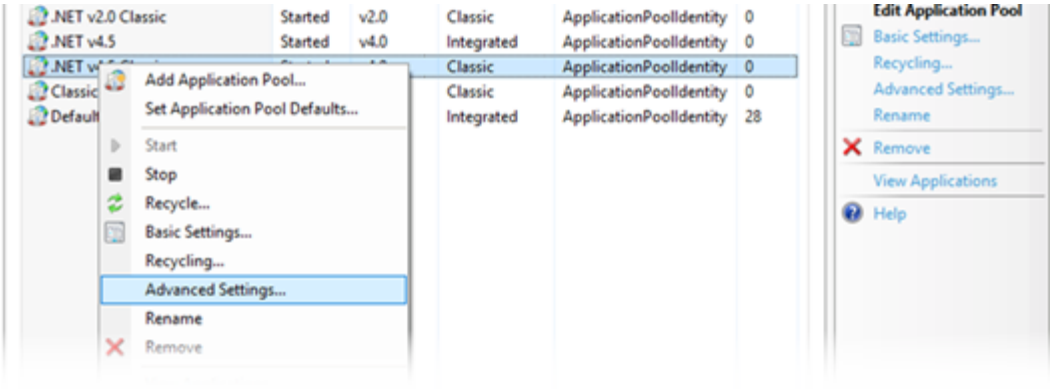
Configure Web Service Run Privilege

The SPMS Web Services (OHC WebServices or OHC TransactionsService) by default are configured to run with ApplicationPoolIdentity. The default run privilege is restricted and cannot retrieve the Digital Signing certificate stored in the Windows Certificate Store when digital signing is required. Therefore, it is important to note that when the Norwegian Fiscal Enhancements feature is enabled, the Cruise IT personnel must change the web service run privilege using the steps below.

1. Open the **IIS Manager**.
2. Select the web services (OHC WebServices or OHC TransactionsService) from the application pool. Right-click and select the **Advanced Settings…** option.

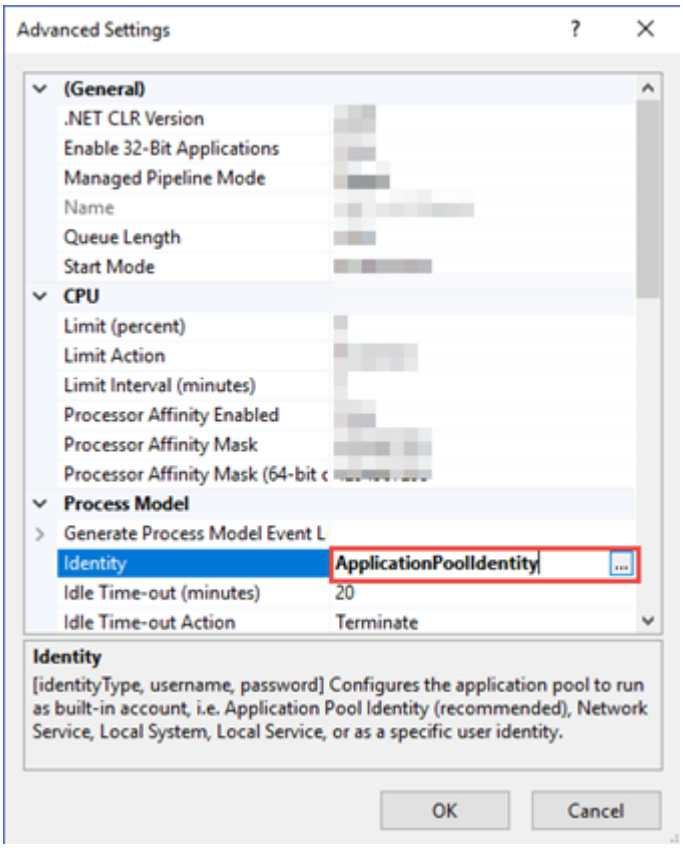
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Figure 30-10 Application Pool Settings



3. Under **Process Model** group, select the **identity** option.

Figure 30-11 Application Pool Advanced Settings



4. In the Application Pool Identify form, select **Custom Account** to change the Windows user access and click **Set**.
5. At the Set Credentials form, enter the **User Name,** and **Password** and confirm the password when prompted.
6. Click **OK** to save and exit.

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Receipt Printing

Norwegian Tax handling enforces all the receipts (Delivery Receipt, Sales Receipt, and Return Receipt) except Pro Forma Receipt to be printed and electronically signed. The receipt layout uses a standard SPMS Invoice Report with additional requirements for each receipt type.

See section Receipt Layout Modification for lists of mandatory elements that need to be presented on all four types of receipts.

Delivery Receipt

Delivery Receipt in terms of this regulation is a print-out from the cash register system for transactions that are not yet closed but charged to the on-board account, in other words, when a Guest acquires a credit or charges a posting to the cabin.

The business logic behind the POST functionality forces a Delivery receipt to be printed on each cabin charge posting. When performing a cabin charge posting, only the **POST & PRINT** button is available.

The following table lists the areas applicable to perform posting and printing of Delivery receipt.

Table 30-1 List of Area to Perform Posting and Print Delivery Receipt

Module	Function
Management, Crew	Guest/ System Account/ Group/ Gift Card handling, Add Posting Crew handling Add Posting Quick Posting
Business Center	Internet Posting
Advanced Quick Check In	Ferry operation: Package posting when creating new reservation Change Schedule Change Cabin
Casino	Post
Currency Exchange	Post to Account
Kiosk	Book an Excursion, Book an Event and Internet Posting
Medical	Add Posting
Shore Excursion	Booking Move BookingPost Unposted Booking Package Postings
Universal Interface	Booking Msg Posting Msg BookExcPack
Web Service	FCUI Posting
Ticket	Event BookingMove Booking
SPA	Post

Sales Receipt

The Sales Receipt in this regulation is a print-out from the cash register system for completed transactions, in other words when a Guest perform payment by cash, credit or other payment methods.

All business logic behind the PAY functionality forces a Sales receipt to be printed when invoice payment is made. Only the **PAY & PRINT** button is available when performing payment / invoice balance.

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The following table lists the areas applicable to perform invoice payment and print a Sales receipt.

Table 30-2 List of Function to Perform Invoice Payment and Print Sales Receipt

Module	Function
Management, Crew	Guest/ System Account/ Group/ Gift Card handling, Pay InvoiceCrew handling, Pay InvoiceGuest/ System Account/ Group/ Resident Quick Billing Pay by Credit Card / Pay Direct Sales
Advanced Quick Check In	Ferry operation – create new reservation: Pay by Credit Card Change Schedule - Pay by Credit Card Change Cabin - Pay by Credit Card
Universal Interface	PaymentMsg
Web Service	FCUI Payment
Shore Excursion	Booking - Pay by Credit Card Quick Booking - Pay by Credit Card

Return Receipts

The Return receipt is a print-out from the cash register system that states the previously printed Sales receipt contains incorrect information or information about repayment for repriced or returned goods or services. In another word, it is a void payment.

Return receipts have to be separately marked. They are not required to be printed, but still can be printed.

The following table lists the areas applicable to perform void payments and print the Return receipt.

Table 30-3 List of Functions to Perform Void Payment and Print Return Receipt

Module	Function
Management, Crew	Guest/ System Account/ Group/ Gift Card handling, 'VOID' button Crew Handling, 'Void' button
Currency Exchange	Exchange Overview, ‘Void’ button
Casino	Cashier, ‘Void Posting’ button
Medical	Search Posting, ‘Void Transaction’ button
Excursion	Handling Lists, ‘Void Tour Booking’ button
Tickets	Account Handling, ‘Void Booking’ button
SPA	‘Void Posting’ button

Proforma Receipts

A Pro forma in this regulation is a print-out from the cash register system that shows provisionally registered sales. In other words, it is an Information Invoice.

From the SPMS module perspective, all information invoices are generated using the following menu options are:

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Table 30-4 Invoices Menu Option

Module	Function
Management, Crew	Guest/ System Account/ Group/ Gift Card handling, 'PRINT INVOICE' button Crew Handling, 'PRINT INVOICE' button Guest/ System Account/ Group/ Resident Quick Billing, 'PRINT' button Crew Quick Billing, 'PRINT' button

Norwegian E-Journal Report

The Norwegian Electronic Journal report is the electronic documentation of the continuous use of the cash register system. Continuous use here, refers to all uses of the cash register system including registration of sales, the printing of receipts like Sales, Return, Pro-forma and Delivery Receipts, change of prices, and the printing of reports X & Z.

The Electronic Journal is protected against alteration and deletion, and is transferable to another electronic medium using a file format that cannot be edited.

1. Log in to the **Management module**.
2. Select **Cashier** from the menu and then select **Norwegian Tax E-Journal Report**. This menu is enabled only when the parameter **Use Norwegian Fiscal Requirement** is enabled and you are authorized to generate the report.
3. At the **Norwegian Tax E-Journal Report** window, select the date range from the date editor.
4. Click **Generate** to create the export as an XML file, based on the path configured in the parameter.

> **Note**
>
> You can only export the receipts once. Previously exported records will no longer exist in the report.

Below is the output file name and format:

```
<SAF-T export type>_<organization number of the vendor who the data
represents>_<date and time (yyyymmddhh24hmise>_<file number/follow period
number in report>.xml
```

For example: `SAF-T Cash Register_A1234567_20180901150823_3.xml`

See Appendix section E-Journal Report Structure on required fields.

Fiscal Report

The cash register system must be able to generate an *X* and *Z* reports per Point of Sale.

By definition, the *Z* report is a daily summary of the registrations in the cash register and the *X* report is a summary of registrations in the cash register since the last *Z* report.

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It is a requirement to produce the Z report but not necessary to have it printed for each Cash Register, and you must describe how to get it printed on demand. Producing the *Z* report may therefore be connected to a change of business (system) date in general and both of these reports are required to print on demand.

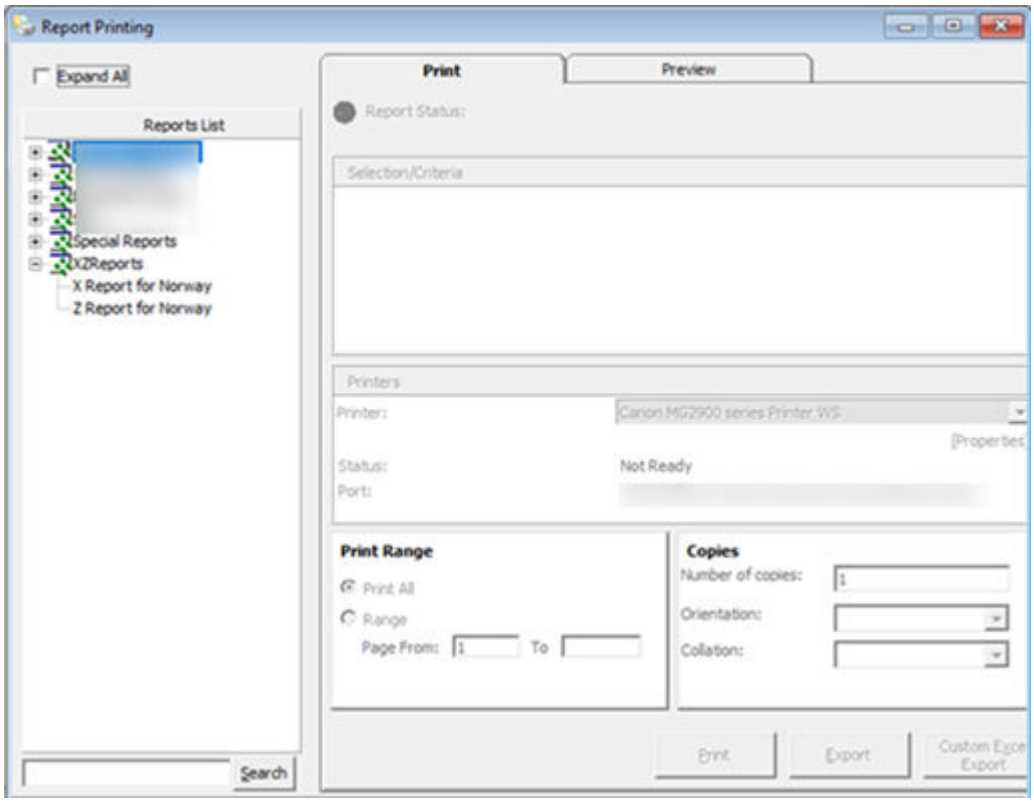
The *X* and *Z* reports should be printed/displayed on any Cash Register. One should be able to run/print the *Z* report by scheduled task and/or manually.

It is important that running/printing of both the *X* and *Z* reports is written into the Electronic Journal.

The X and Z reports are generated from **Administration, Reports, Reports** module.

For X and Z Report Structure, see X and Z Report Structure in the Appendix section.

Figure 30-12 Report Printing Function



Use of Cash Invoice

As an alternative, you can use the cash invoice to register cash sales in a cash register system. Below are the required parameters and the procedure.

System Parameters

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Table 30-5 System Parameters for Cash Invoice

PAR Name	PAR Value	Description
Address Check For Payment Methods	Accepted values are DEP_ID of DEP where DEP_FLAG=C. Use a comma as a delimiter.	Payment methods that trigger the 'Address Validation For Folio Generation' during settlement.
Address Validation For Folio Generation	Accepted values are any field of UXP and RES table. Use a comma as a delimiter.	Payee address elements to validate during settlement, selected field(s) must have a value.

When performing a settlement, the system,

1. validates the selected payment department against the department id defined in the parameter '**Address Check For Payment Methods**', followed by the address fields defined in parameter '**Address Validation For Folio Generation**'.
2. if the validation passes, the settlement will be done. Note: The fields will be printed on the invoices if they are defined in the report template.
3. a warning message shall prompt if the address element(s) is missing and the settlement process will terminate.

System Parameters

The following general parameters serve as a switch to enable/disable the features introduced by Norwegian Fiscal Enhancements. It also ensures that the changes introduced do not affect existing SPMS operations that do not require the Norwegian Fiscal Enhancements.

The parameters mentioned in the table below are inserted by running the Database Installer for release 8.0.8 and above. To enable this feature, log in to the **Administration module, System Setup, Parameter, General** group.

Table 30-6 Parameter Group General

PAR Name	PAR Value	Description
Use Norwegian Fiscal Requirements	1	1 – Turn ON the Norwegian Fiscal Requirements Changes. 0 – Turn OFF the Norwegian Fiscal Requirements Changes.
Norwegian Tax Audit Report Path	`C:\Users\Public\Documents\Oracle Hospitality Cruise\`	Default path to store report output file.

When enabling the Norwegian Fiscal Enhancements general parameters, the application prompts the following:

By enabling the parameter, Use Norwegian Fiscal Requirements", you agree that the Financial functions (Postings, Payments and Printing of Invoices) in the iCrew application will be disabled for ALL users.

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Appendix

The following section list the information required to generate a receipt, digital certificate, E-Journal and X and Y Report for submission to the Norwegian Tax Authority.

Receipt Layout Modification

The Norwegian Tax Authority requires that the receipts contains the following information.

Sales Receipt Requirements

The table below describes the requirement for the Sales Receipts.

Table 30-7 Sales Receipt Requirements

Mandatory Element on Sales Receipt	Comments
Document Number and Date	Consecutive number of document (Sales Receipt) and date of the document.
Parties involved	Information about document (Sales Receipt) Issuer and Receiver. Issuer data must contain the name, address, and organization number (from The Brønnøysund Register Centre (Brønnøysundregistrene) of the enterprise. If the issuer is registered with the VAT Register, the organization name shall follow the following convention: the letters “MVA” +registration number. Receiver data must contain identification data.
Date and place of delivery	When and where services were delivered.
Sale nature and scope	Services that have been delivered.
Specification of taxable and tax-free sales	Taxable and tax-free sales and the sales exempted from VAT shall be listed and added separately. The same applies if taxable turnover tax is calculated at different rates.
Identification of Cash Register	The ID number of the Cash Register System (UWID). It must be a unique identifier that represents the PC Workstation that prints the receipt, it must not be changeable and preferably a combination of letters and numbers. It must be unique to each business location (ship) and within the company's organization (fleet). It must also be unique in the case of Workstation replacement. (suggestion UWID -> XCET_FC_ID + WORKSTATION ID)
Indication that document is a Sales receipt (Salskvittering)	The word 'Salskvittering' must appear at the top of the receipt and are twice as big as the “change due” entry on the receipt. It is not permitted to replace the upper case letters with a lower case. The font of the text must be at least 50% larger than the text of the amount shown.

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Table 30-7 (Cont.) Sales Receipt Requirements

Mandatory Element on Sales Receipt	Comments
Indication that Sales receipt is in electronic form (Elektronisk Salskvittering)	If the sales receipt is produced in electronic form, the words "Elektronisk salskvittering" (Electronic sales receipt) must be displayed.
Digital Signature	Each receipt must be electronically signed. The signature shall sign specific data from each receipt and recorded in the Electronic Journal upon finalization of each transaction. Electronic signature of the Sales Receipt must not be printed but it must be stored in the Electronic Journal.

Return Receipt Requirements

The layout of Return Receipt is similar to Sales Receipt except the following:

Table 30-8 Return Receipts Requirement

Mandatory Element on Return Receipt	Comments
Indication that document is a Return Sales receipt (Returkvittering)	The word 'Returkvittering' must appear at the top of the receipt in letters as big as the “change due” entry on the receipt. It is not permitted to replace the upper case letters with a lower case. The font of the text must be at least 50% larger than the text that of the amounts shown.

Proforma Receipt Requirements

The layout of the Pro-Forma Receipt is similar to Sales Receipt except for the following:

Table 30-9 Proforma Receipt Requirement

Mandatory Element on Proforma Receipts	Comments
Indication that document is a Pro forma receipt (Foreløpig kvittering)	Phrase 'Foreløpig kvittering – IKKE KVITTERING FOR KJØP' must appear at the top of the receipt in letters twice as big as the “change due” entry on the receipt. It is not permitted to replace the upper case letters with a lower case. The font of the text must be at least 50% larger than the text of the amount shown.

Delivery Receipt Requirements

The layout of the Delivery Receipts is similar to Sales Receipt, except for the following

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Table 30-10 Delivery Receipt Requirement

Mandatory Element on Delivery Receipts	Comments
Indication that document is a Delivery receipt (Utleveringskvittering)	Phrase 'Utleveringskvittering – IKKJE KVITTERING FOR KJØP' must appear at the top of the receipt and in letters twice as big as the “change due” entry on the receipt. It is not permitted to replace the upper case letters with a lower case. The font of the text must be at least 50% larger than the text that shows the amounts.

Digital Certificate Requirement

To implement digital signature cryptographic functions, a key pair of a private key and a public key is required. The key pair is stored in a digital certificate form. The Norwegian Tax Authority requires that the digital certificate format to be as shown below.

- **Format:** x.509
- **Charset:** UTF-8
- **Encoding:** Base-64
- **Endianness:** Little Endian
- **OAEP Padding:** PKCS1 v1.5 padding
- **Private key size:** 1024 bits
- **Hash Message Format:** SHA-1

Digital Signature

Digital signature in our context here is the asymmetrically encrypted hash of the Transaction Data. Briefly, the digital signature is defined as:

```
<Transactiondatahash> = Sha-1(<Transactiondata>)
<Digitalsignature> = Rsa-1024(<Transactiondatahash >) Using The Private Key
```


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Signing and Verification Process

Figure 30-13 Signing and Verification Process

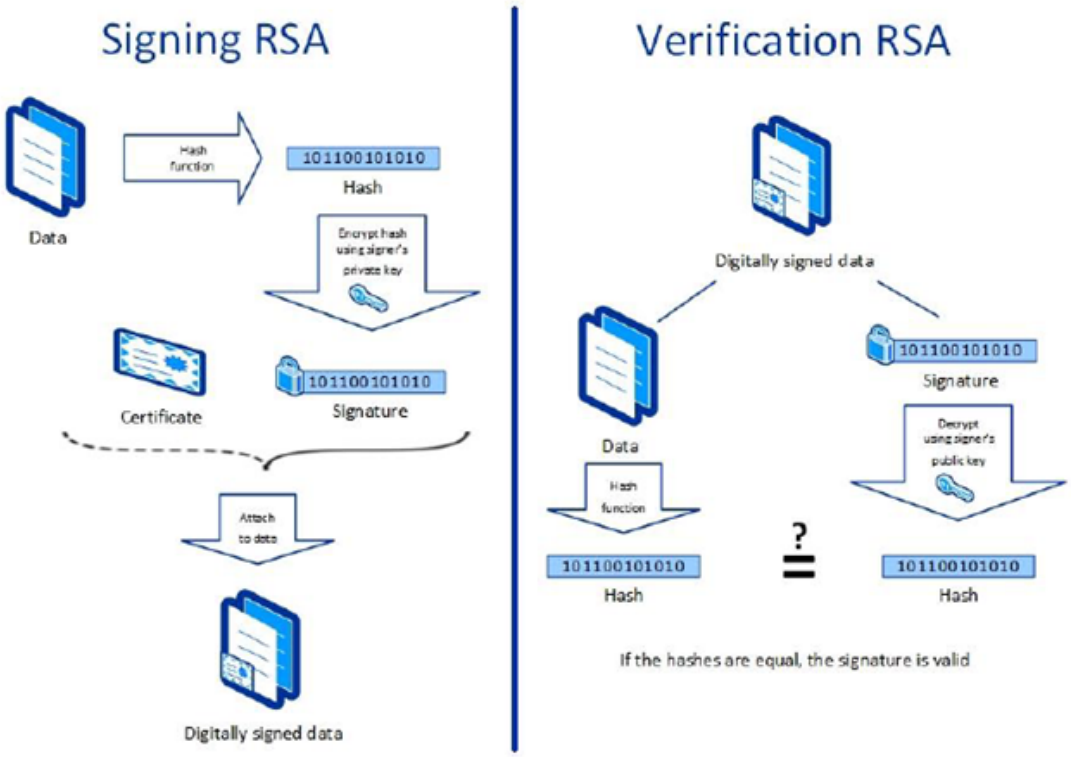


Figure 30-14 Sample Signed and Verified Certificate

Data to be signed:

signature_from_previous_receipt;

Hash data with :

Encrypt the hash value with private key and generate signature:

signature_for_this_receipt

Verification of signature:

Generate hash with with same data as signed above:

Use public key on signature to get hash:

The hash values are the same and the data integrity is confirmed.

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Digital Signature Trail

To preserve the integrity of transactions, the Norwegian Tax Authority mandates that the digital signing process should be chained, as shown below where the signature trail that SPMS would apply appears for its digital signing function.

- Cruise Line Company A
  - Ship AA
    - TransactionAA1
      - SignatureAA1
    - TransactionAA2
      - SignatureAA2 (from SignatureAA1)
    - TransactionAA3
      - SignatureAA3 (from SignatureAA2)
  - Ship AB
    - TransactionAB1
      - SignatureAB1
    - TransactionAB2
      - SignatureAB2 (from SignatureAB1)
    - TransactionAB3
      - SignatureAB3 (from SignatureAB2)
- Cruise Line Company B
  - Ship BA
    - TransactionBA1
      - SignatureBA1
    - TransactionBA2
      - SignatureBA2 (from SignatureBA1)
    - TransactionBA3
      - SignatureBA3 (from SignatureBA2)
  - Ship BB
    - TransactionBB1
      - SignatureBB1
    - TransactionBB2
      - SignatureBB2 (from SignatureBB1)
    - TransactionBB3
      - SignatureBB3 (from SignatureBB2)

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Verifying Digital Signature

Table 30-11 Digital Certificate Elements and Descriptions

Element in SAF-T Cash Register	Description	Format and requirements	Examples
signature (previous)	Signature from previous receipt	Base-64 If no previous receipt the signature value must be set to “0” – number zero	signature_from_previous_receipt
transDate	Date at which the transaction was performed.	YYYY-MM-DD Do NOT use time zone or combined date and time format.	2014-01-24 2015-10-29
transTime	Time at which the transaction was performed.	hh:mm:ss Use ss=00 as default value if no information of seconds are available. Same as within the SAF-T export. Do NOT use time zone or combined date and time format.	23:59:59
nr	Transaction number. This must be a unique, sequential number within a journal. This will be the same as the number stated on the issued receipt	No leading or ending spaces.	123456789
transAmntIn	The amount involved in the transaction, including VAT.	Decimal Data Type: Numerical field with two decimals. Decimal separator “.” (dot). No thousand separators. No leading or ending spaces.	1250.00 -1250.00 0.00
transAmntEx	The amount involved in the transaction, excluding VAT.	Decimal Data Type:	1000.00 -1000.00
signature (current)	Signature of current receipt	Base-64 If no previous receipt the signature value must be set to “0” – number zero	

Below are the steps to verify the digital signature.

1. Get Transaction Data from e-journal xml file.
2. Ensure that you have the public key in PEM format. You need this to verify the signature.
3. Save the transaction data in **message.txt** file.
4. Save the signature in **signature.txt** file.
5. Go to Windows search and type **“git bash”** to start the command line tool.

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6. Extract the public key from the certificate.

```
$ openssl x509 -pubkey -noout -in <certificate_name> > pubkey.pem
```

7. Now, decode the base64 encoded signature and store it in "<signature_name>.txt" file.

```
$ cat signature.txt| base64 -d > <signature_name>.txt
```

8. Finally, verify the signature.

```
$ openssl dgst -<name> -verify pubkey.pem -signature <signature_name>.txt
message.txt
```

E-Journal Report Structure

This following tables list the report header for standard report, company report and company by location and cashier register.

Report <header> Structure

Table 30-12 Report Header Structure

Element	Descriptions
<fiscalYear>	Current year of From Date.
<startDate>	First day in current year of From Date.
<endDate>	Last day in current year of To Date.
<curCode>	Current currency code setup in SPMS.
<dateCreated>	Current database date.
<timeCreated>	Current database time.
<softwareDesc>	Current software to generate E-Journal report.
<softwareVersion>	Current software version.
<softwareCompanyName>	Current company setup in SPMS
<auditfileVersion>	The XML version number to be displayed in E-Journal Report.
<userID>	Login user who generates E-Journal Report.

Report<company>Structure

Table 30-13 Company Report Header Structure

Element	Descriptions
<companyName>	Get from Name under Company Entities Setup in OHC Administration.
<taxRegIdent>	Get from VAT registration number under Company Entities Setup in OHC Administration.
<customersSuppliers>	Customer details. Only customer who exists in the receipt period being selected from user interface.

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Table 30-13 (Cont.) Company Report Header Structure

Element	Descriptions
<vatCodeDetails>	All VAT configuration details are using in SPMS.
<standardVatCode>	Standard VAT Code stated in norwegian-saf-t-standard-vat-codes.pdf. More details in section Standard Predefined Code 99 – Standard VAT Codes.
<periods> <periodNumber>	Period number of the defined period. Period number is generated by sequence CNT_EJOURNAL_RUNNO from database.
<employees>	Employee who generate the receipt and trigger the event (refer to <event> node). Only employee who exists in the receipts period is selectable from user interface.
<articles>	Department and main department details. Only department and main department that exist in the receipts period is selectable from user interface.
<basics>	Main department ID for credit and debit department, and transaction code. With the mapping standard predefined code. See section Standard Predefined Code 04 — Article Group/ Department Codesfor more information.

Report <company><location><cashregister> Structure

<registerID>

Company ID in Company Entities Setup in OHC Administration, combine with my computer name.

<regDesc>

Name in Company Entities Setup in OHC Administration.

<event>

Log record from LOG table. Only records that exist in the date period being selected from user interface.

<cashtransaction>

One <cashtransaction> per one receipt. Only receipts that exist in the receipts period being selected from user interface.

<nr>

Receipt number.

<transID>

Receipt number.

<transType>

Receipt type:

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- SALES
- RETURN
- PROFORMA
- DELIVERY

Refers to section Standard Predefined Code 11 – Transaction Codes

`<transAmntIn>`

Total receipt amount including VAT tax.

`<TransAmntEx>`

Total receipt amount excluding VAT tax.

`<amntTp>`

An increase in revenue (such as sales) is to be marked as C.

While a decrease in revenue (such as returns) is to be marked as D.

`<empID>`

User who generates receipt.

`<custSupID>`

Customer account number.

`<periodNumber>`

Refer to `<periods>` in above table.

`<transDate>`

Receipt creation date.

`<transTime>`

Receipt creation time.

`<invoiceID>`

Delivery receipt number.

`<rounding>`

Rounding to 2 decimal places.

`<signature>`

Digital signature of receipt.

`<keyVersion>`

The version of the private/secret key.

`<voidTransaction>`

True = Void transaction

False = No

`<vat>`

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VAT details of all transactions within each receipt.

<payment>

Payment details of receipt.

<ctLine>

All transactions of the receipt. Record is retrieved from POS table.

<nr>

Receipt number. Link to root <nr>.

<lineID>

POS_ID of the POS record.

<lineType>

Transaction type of the POS record.

- POST
- SALES
- REFUND
- DIS
- VOID

Refers to section 2.4 Standard Predefined Code 11 – Transaction Codes.

<artGroupID>

Main department ID of the POS record.

<artID>

Department ID of the POS record.

<qnt>

Quantity of the POS record.

<lineAmntIn>

Amount of the POS record including VAT tax.

<lineAmntEx>

Amount of the POS record excluding VAT tax.

<amntTp>

An increase in revenue (such as sales) is to be marked as C.

While a decrease in revenue (such as returns) is to be marked as D.

<empID>

User who process this record.

<lineDate>

POS record creation date.

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`<lineTime>`

POS record creation time.

`<vat>`

VAT details of the POS record.

`<discount>`

Discount details of the POS record

X and Z Report Structure

X Report

An X Report must contain the following information at the very least:

- An inscription that the report is an X report.
- The name and organization number of the enterprise.
- The date and time.
- The ID number of the Cash Register System (UWID). It must be a unique identifier that represents the PC Workstation that prints the report, it must not be changeable and preferably a combination of letters and numbers. It must be unique on each business location (ship) and within the company's organization (fleet). It must also be unique in case of Workstation replacement.
- Total cash sales
- The number of cash sales and amounts broken down by different means of payment
- The number of cash sales and amounts broken down by different means of payment for each individual operator (user)
- The number of tips and amount
- Sales subject to value added tax and sales free from value added tax, as well as value added tax subdivided into different value added tax rates
- Opening change float
- The number of Sales receipts
- The number of Copy receipts and amount (currently not applicable for OHC SPMS)
- The number of Pro forma receipts and amount
- The number of returns and amount
- The number of discounts and amount
- Number of Delivery receipts and amount
- Grand total sales
- Grand total returns (voids)
- Grand total net

Z Report

A Z Report must contain at least the same amount of information as X Report except of the following:

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- An inscription that the report is a Z report.
- A Z Report number that represents a unique counter that is increased every time it is run. This means that a Z Report must not have the same number as an earlier Z Report.
- A Z Report must not contain transactions that have been included in an earlier Z Report.

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