

# Staff Logins

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Category	BOS General
Course	Security
Version	1.0
Client	Generic
Software	2.12.100

Staff logins control the functions that an operator can use on a register and a mobile scanning device.

## Procedure to Create a New Operator Account

### Hints and Tips

- ✓ Run the **Listing –Operator** report to view the level of access assigned to each operator. This report is located in the **Reports** menu -> **Maintenance**.
- ✓ Contact the Help Desk to configure:
  - the permissions assigned to each level of access
  - the password security settings (expiry, length etc).
- ✓ **POS Staff Type** gives access to the register and a mobile scanning device:
  - **Operator:** restricted POS and all Telnet functions.
  - **Supervisor:** all POS functions and all Telnet functions.
  - **Non-Operator:** no POS access, only all Telnet functions.
- ✓ **PDA Staff Type** gives access to the WEB application on a mobile scanning device:
  - **Operator Full:** all functions.
  - **Operator Min:** restricted functions (as configured for your business).
  - **Operator Non:** no access.
- ✓ You must click **Update** to activate the operators' access.

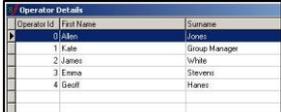
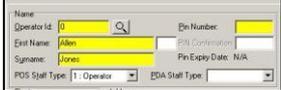
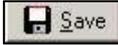
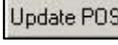
1.	From the <b>BOS Tools</b> menu, select <b>Operator Details</b> . <i>*Or click the <b>Operator Details</b> icon.*</i>	
2.	Click <b>New</b> .	
3.	In the <b>Operator ID</b> field, type a unique number to identify the operator.	
4.	In the <b>Pin Number</b> field, type a confidential password. <i>*The length and characters required are set up in POS Config -&gt; Security -&gt; Password Settings.*</i>	
5.	In the <b>PIN Confirmation</b> field, re-type the confidential PIN. <i>* A warning message is displayed if there is a discrepancy between the Pin number.*</i> <i>*The <b>Pin Expiry Date</b> populated is configurable, and can be disabled in POS Config.*</i>	
6.	In the <b>First Name</b> field, type the operator's name.	
7.	In the <b>Surname</b> field, type the operator's surname.	
8.	In the <b>POS Staff Type</b> , select the required level of POS access ( <i>See Hints and Tips</i> ).	
9.	In the <b>PDA Staff Type</b> , select the required level of access ( <i>See Hints and Tips</i> ).	
10.	In the <b>Float</b> field, select: <ul style="list-style-type: none"> <li>• <b>Standard</b> float for register accountability</li> <li>• <b>Cash Float Amount \$</b> for operator accountability.</li> </ul> <i>*A default float amount is configurable.*</i>	
11.	Complete any other optional fields required.	
12.	Click <b>Save</b> .	
13.	Click <b>Update POS</b> . <i>*The Operator ID is now recognised.*</i>	
14.	Click <b>Close</b> when finished.	

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**Procedure to Edit or Delete an Operator Account**

**Hints and Tips**

- ✓ You can't delete an operator if there's sales history linked to them; this is only cleared if your business does purging.
- You can re-use the operator ID of someone who has left (changing all the other details), but it's recommended that you wait a few months so that there's a clear line of separation.
- ✓ Use POS Staff Type **Non-Operator** to disable an operator, if you don't want to (or can't) permanently delete their record.
- ✓ You must click **Update** to update the operators' access.

<p>1. From the BOS <b>Tools</b> menu, select <b>Operator Details</b>. *Or click the <b>Operator Details</b> icon*.</p>	
<p>2. Click the required operator. *The operator details are populated in the fields*.</p>	
<p>3. <b>To:</b> edit details <b>then:</b> go to step 4. delete an operator go to step 5.</p>	
<p>4. Complete the following steps to edit an operators details:</p> <ul style="list-style-type: none"> <li>• Click in the applicable field, and overtype a new value.</li> <li>• Click <b>Save</b>.</li> <li>• Click <b>Update</b>. The changes are effective.</li> <li>• Click <b>Close</b> when finished.</li> </ul>	  
<p>5. Complete the following steps to delete an operator:</p> <ul style="list-style-type: none"> <li>• Click <b>Delete</b>. A confirmation message is displayed.</li> <li>• Click <b>Yes</b> to process, or <b>No</b> to cancel.</li> <li>• Click <b>Update</b>. The account is deleted.</li> <li>• Click <b>Close</b> when finished.</li> </ul>	