# V6 User Configuration

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Introduction

In order for the system to work effectively, each operator must be given their own Operator ID and Password. This will allow each operator to be assigned to a Password Group enabling control of the areas that each operator can access. The level of access should depend on the job title, however it is up to you the level of access you want to set for each member of staff.

With each operator having a separate Operator ID, this will ensure that any changes they make whilst using the Elite System will be auditable against their ID.

Passwords set for each Operator will expire after Sixty days. Fourteen days prior to the expiry of an operator's password, the operator will be prompted when they log in that their password is due to expire and will ask them if they wish to change their password at this time. The password would then need to be changed to an alternative password.

1. Creating An Operator
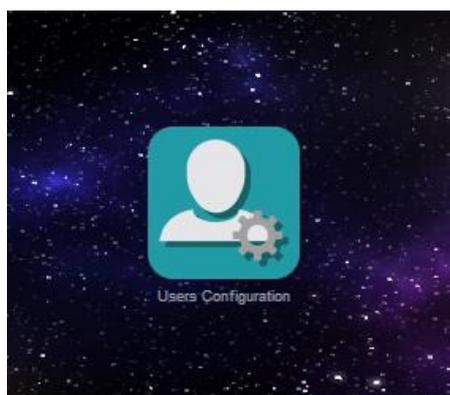
Select **User Configuration**


Select **User File**
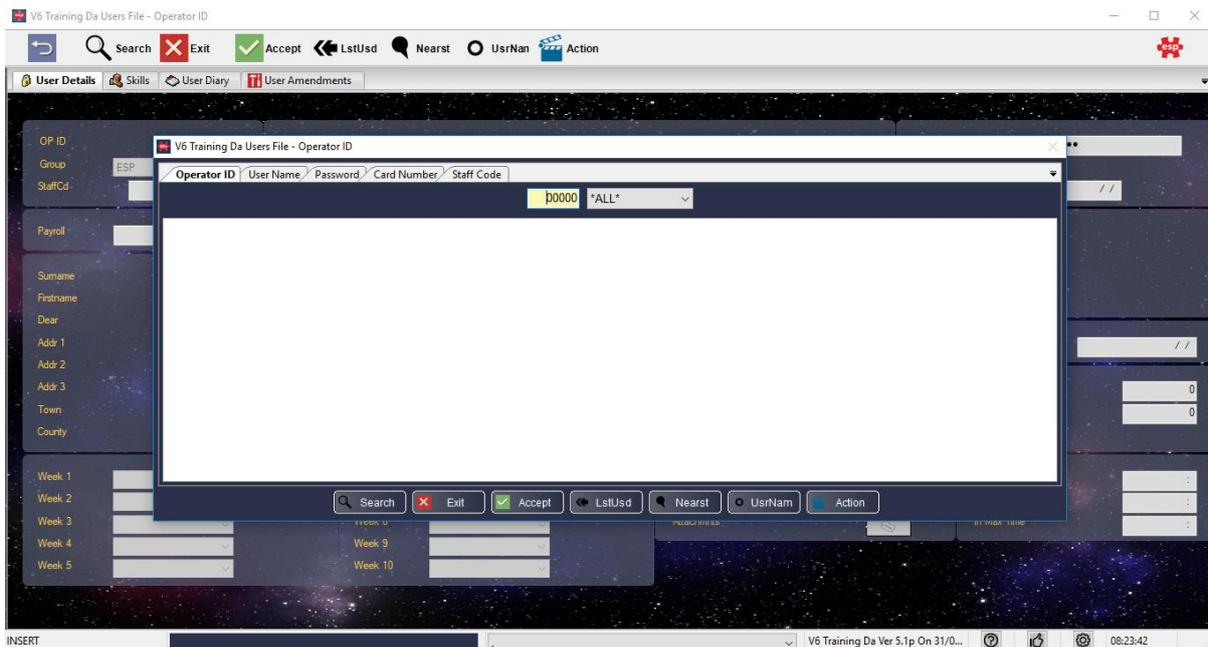
You will be presented with a filter screen

Enter the Next Operator ID - e.g. '21' (do not leave spaces in your Operator ID Numbers) into the yellow box displaying '00000'

Press **Enter**
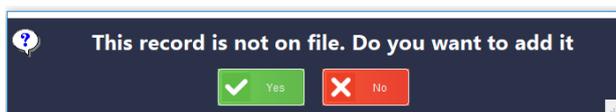
You will then receive a prompt, **'This record is not on file. Do you want to add it?'** Select **Yes**. The following screen will now appear.

Enter the **Full Name** of the operator

Enter the **Password** for the new operator. The password can be up to 8 alpha-numerical characters and should be the operator's choice. For new operators enter their first name as their password: via 'F7 - Action' select, 'Force Password Renewal'. Upon first login into the system, the user will be prompted to change their password, by doing this, the system becomes one hundred percent secure, i.e. nobody will know which password they have chosen.

Once you have added the password press **Enter**

You will now be prompted to enter the password for a second time to confirm the details.

If the staff are using Operator Cards for access to point-of-sale terminals, you can now enter the card number for the employee. Whilst the cursor is flashing in the Card Number field, swipe the card through/over the reader and the card number will automatically be entered.

Enter the **Operator's Initials**

If each operator has their own internal e-mail address, this can be entered into the Password Details. The e-mail address does not need to include the domain name, in this area, as the system will assume that it is the local domain, i.e. at ESP, 'e-s-p.com', however, if your were using an operators person email address, i.e. held with Hotmail, then the domain 'hotmail.com', would need to be included.
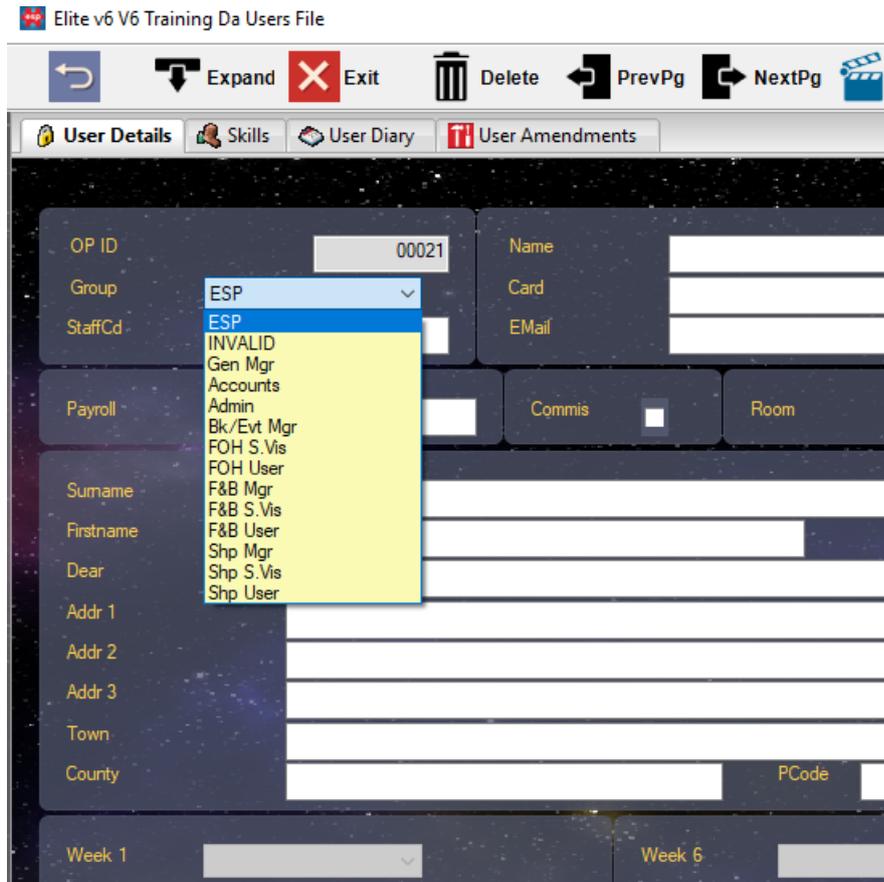
Select the **Operator Group** from the drop-down list shown below. The option selected in this list will define the level of access available to the operator.

Select **F2 - Exit** to save the record

2. Deleting An Operator

When a member of staff leaves your establishment, their Operator ID should be removed from the Password File in the following way:
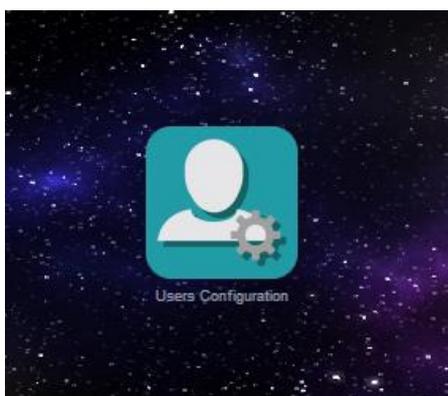
Select **Users Configuration**
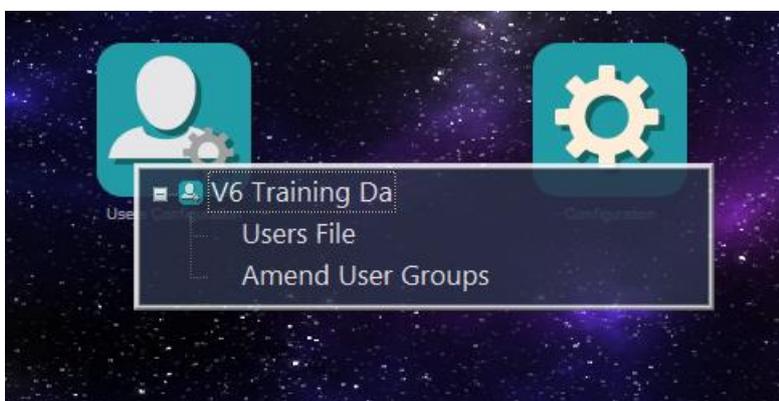
Select **Users File**

Enter the **Operator ID** - e.g. '21' into the yellow box at the top of the filter screen

Press **Enter**

The Operator File will now be displayed on the screen
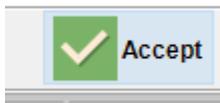
Select **F3 - Accept** to accept into the record

Select **F4 - Delete** to delete the record
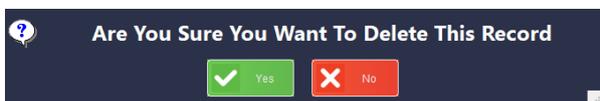
You will then receive a prompt, **'Are You Sure You Want To Delete This Record?'**

Select **Yes**

The Operator's File will now have been deleted and you will return to the Operator ID Filter Screen

3. Printing A List of Operators

It is often a good idea to print an operator list for quick reference. This should be kept in a secure place,
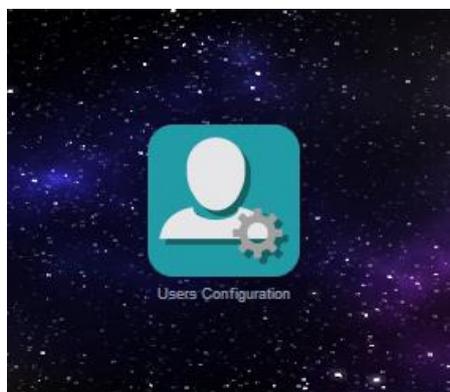
To print a list of operators, open the '**Users Configuration**' application from the Desktop.
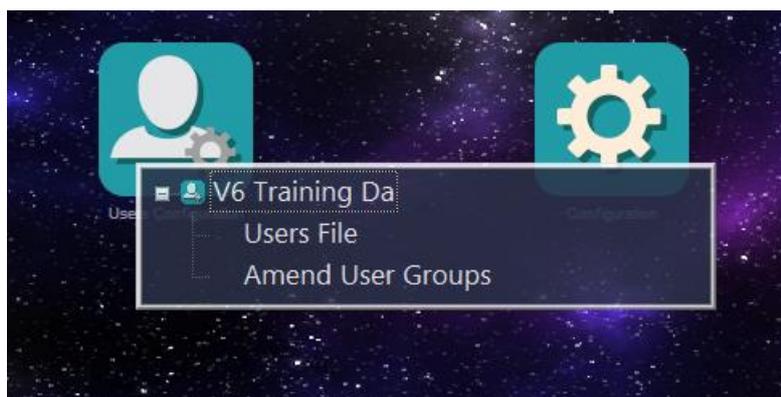
Select **Users File**

Select **F7 Action**

Select **Choose**

Select **Choose Records**

Select the **Order** in which you want the Operator Details to be printed
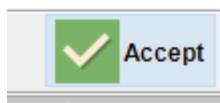
Select **F3 – Accept**
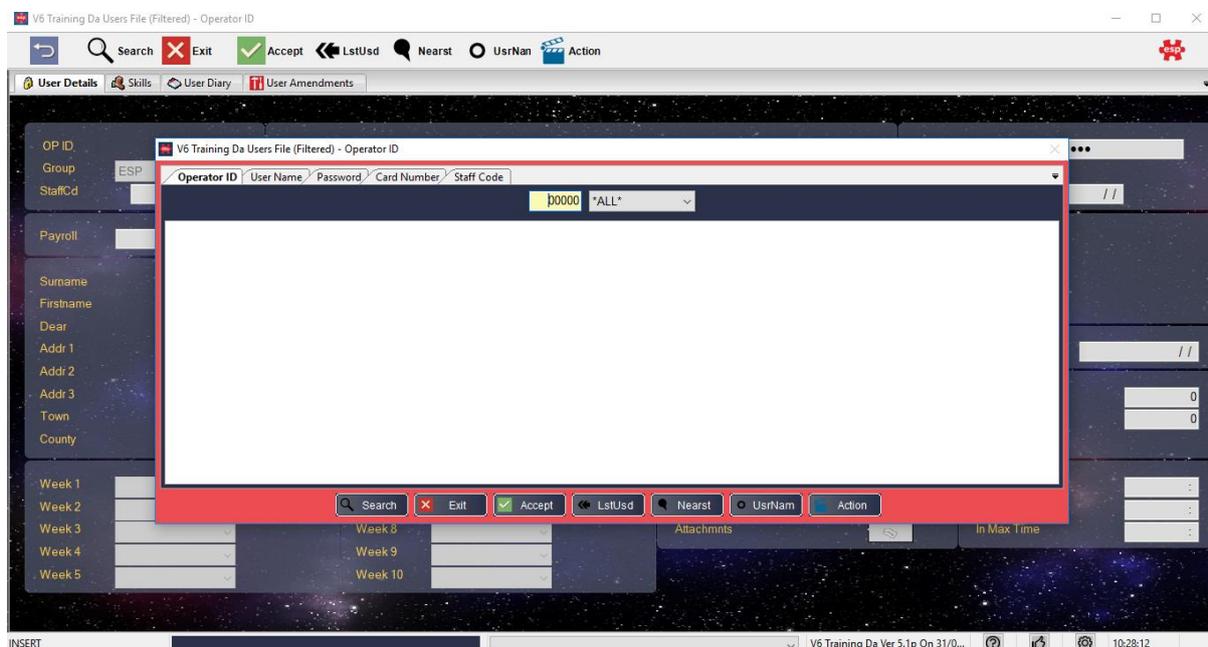
A blank filter screen with a red box will appear

Select **F7 – Action**
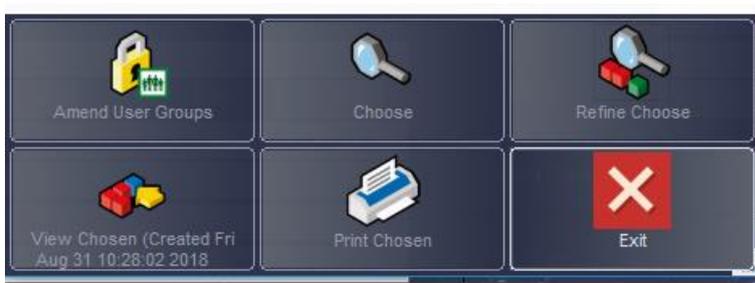
Select **Print Chosen**

Select **Print Standard Report**

4. User Group Permissions

User Group Permissions can be set to define what level of access each User Group has to the Elite Applications.
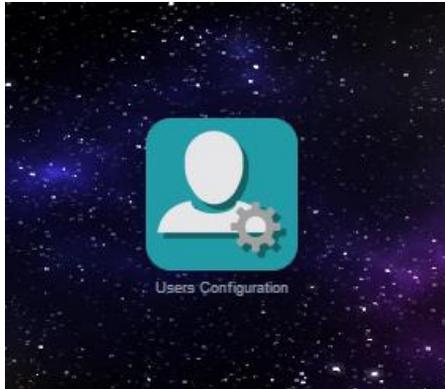
Select **User Configuration**
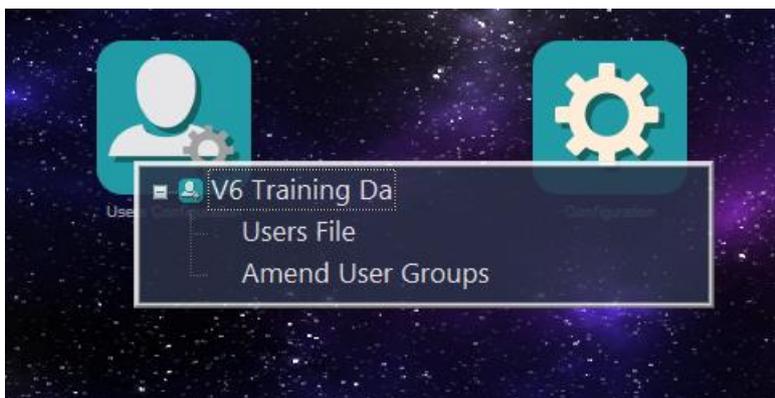
Select **Amend User Groups**
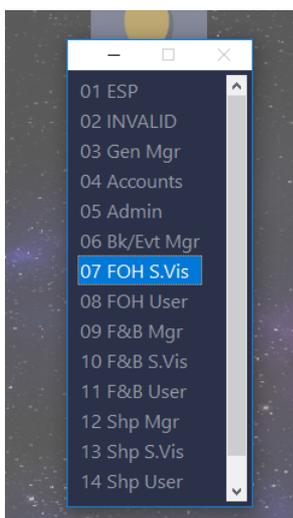
Select the **user group** you want to amend.
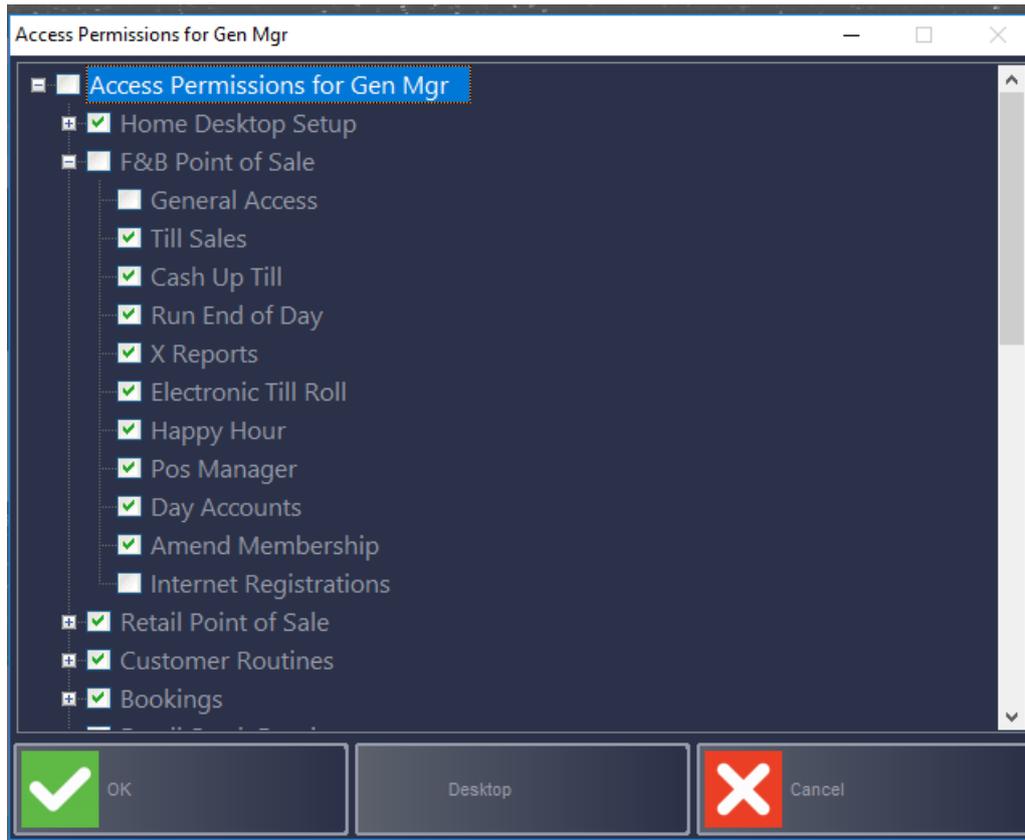
Tick the applications each user group has access to. Select OK once complete.

Elite User Permissions

User Groups	Allows the operator to amend the access permissions for the various user Groups.
Create Users/Groups	Enables the operator to Add/Delete a user record and amend the Group, Name, Staff OD and Email fields

Home Desktop Setup

General Access	Allows access to the desktop and its application to load at initial login.
System Attachments	Allows the operator to access all documents stored within the system attachments folder.

Customer Routines

Maintain Customers records.	When in the customer file, allows access to create/amend/delete customer
Print Customer	When in the customer file, allows access to the choose and print options.
Print Standard Customer Report files.	Allows access to print standard customer reports from within customer
Create Postings routines or a	Enables the operator to create a posting either from sales ledger posting customer file.
Create Batch Postings posting routines.	Enables the operator to create a batch posting from the sales ledger

Maintain Subscriptions	Allows the operator to create/amend/delete subscription codes, however, amend tables must also be allowed.
Maintain Schemes	Allows the operator to create/amend/delete schemes, however, amend tables must be allowed.
Private Details	Allows the operator to view data that has the private details, flag ticked in the customer file. This data will be hidden if this is not enabled.
Financial Control	Allows the operator to amend credit status and credit limits from the renewals tab within a customer file.
Membership Control	Allows the operator to amend the membership type and renewal data from the renewals tab within a customer file.
Card Details	Allows the operator to create/amend/delete cards associated to a customer from within a customer file.
Day Accounts	Enables the creating, posting and invoicing of day accounts.
Amend Points	Enables the manual amending of points within a customer file.
Amend Membership	Allows the operator to amend details within a customer file.
Secure Reports	This option is only used if secure menus are used within the standard customer reports (secure menus must be setup by ESP). The user will be allowed to view the reports within the secure menu.
Full Sales Ledger Ctrl	Allows operator to over type the value of a posting.
Merge Customer Details	Enables the operator to merge records together. This enables them to group old records together; as any record with history in the sales ledger cannot be deleted.
Internet Registration	Enables the operator to register a member for their club's internet bookings site.
Importing Addresses	Enables the operator to import customer details using the standard csv import document.
Scheme Expiry	Allows the operator to amend scheme expiry date.

Admin Financials and Reporting

Utilities	Allows access to the maintain documents section where operators can create, amend or delete system letters.
Safe Routines	Allows access to the menu containing safe audit reports, banking, petty cash routines and safe adjustments. Safe adjustments must also be enabled to access the petty cash routines and safe adjustments.
Safe Adjustments	Allows the operator to access petty cash routines and safe adjustments.
Create Postings	Allows the operator to create a posting either from sales ledger posting routines or a customer file.
Create Batch Posting	Allows the operator to create a batch posting from sales ledger posting routines.
Maintain Analysis Codes	Allows the operator to point analysis codes.
Journals	Allows the operator to batch journals together for importing into the accounts system.
Attachments	Allows the operator to access the attached documents section of the Account Journal Routines.
Amend Euro Rate	Allows the operator to amend the conversion rate for Euros.
Reports	Allows access to the print standard reports option.
Secure Reports	This option is only used if secure menus are used within the standard customer reports (secure menus must be setup by ESP). The user will be allowed to view the reports within the secure menu.

Amend Admin Configuration

General Access	Allows access to the desktop and its applications to load at initial login.
Customer File	Allows access to the customer details option from the main menu.
Amend Tables	Allows access to the amend tables option from the main menu.
Bookings	Allows access to the bookings screen from the main menu.
Reports	Allows access to the print standard reports option from the main menu.
Maintain Customers	When in the customer file, allows access to create/amend/delete customer records.
Print Customers	When in the customer file, allows access to the choose & print option.
Print Std Customer Reports	Allows access to print standard customer reports from within customer file then choose & print.
Create Postings	Enables the operator to create a posting either from sales ledger posting routines or a customer file.
Create Batch Postings	Enables the operator to create a batch posting from sales ledger posting routines.
Maintain Subscriptions	Allows the operator to create/amend/delete subscription codes, however, amend tables must also be allowed.
Maintain Schemes	Allows the operator to create/amend/delete schemes, however, amend tables must also be allowed.
Maintain Daily Data	Allows the operator to maintain daily data, however amend tables must also be allowed.
Maintain Analysis Codes	Allows the operator to point/u-point analysis codes, however amend tables must also be allowed.
Private Details	Allows the operator to view data that has the private details flag ticked in the customer file. This data will be hidden if this is not enabled.
Financial Control	Allows the operator to amend credit status and credit limits from the renewals tab within a customer file.
Membership Control	Allows the operator to amend the membership type & renewal data from the renewals tab within a customer file.
Card Details	Allows the operator to create/amend/delete cards associated to a customer from within a customer file.
Day Accounts	Enables the creation, posting and invoicing of day accounts.
Amend Points Value	Enables the manual amending of points within a customer file.
View Membership	When enabled will allow read-only access to a customer file. This will override any other permissions linked to customer files.
Amend Messages	Allows the operator to maintain messages, however, amend tables must also be allowed.
Secure Reports	This option is only used if a secure menu is used within the standard customer reports (secure menus must be setup by ESP). The user will be allowed to view the reports within the secure menu.
Account Journal Routines	This option is only applicable for sites running accounts integration. When enabled, this will allow the operator to create journal batches.
Maintain Communications	Allows the operator access to maintain the communications module.

Retail/Leisure/PMS/Spa Permissions Point of Sale

General Access	Allows terminals that log straight into the POS to gain access to the system.
Till Sales	Allows the operator to login and complete standard transactions.
Cash Up Till	Allows the operator to cash up the till they are using.
Run End of Day	Allows the operator to run the end of day process within the retail system.
X Reports	Allows access to the x reports option.
Electronic Till Roll	Allows the operator to view the electronic till roll.
Exchange Range Cards	Allows the operator to transfer credit from one card to another.
POS Manager	This option is only required when using point of sale authorisation; the system may be setup so that void, no sale and/or return item will require authorisation when used. POS manager must be enabled for the operator to authorise this.
Sell Staff Range Cards	Allows the operator to sell staff range cards if set up.
Amend Membership	Allows the operator to amend details within a customer file.
Day Accounts	Enables the creation, posting and invoicing of day accounts.
Refund Bookings	Allows the operator to refund a booking.
Internet Registrations	Allows the operator to register customers for the Elite Live portal.
Internal Spa Commission	Enables the operator to be identified as eligible for gaining commission when spa products are sold.

Stock Routines

Amend Sundries	Allows the operator to create/amend/delete sundry keys.
Amend Presets	Allows the operator to create/amend/delete POS presets.
Stock Valuation	Allows the operator to view a current or historic stock valuation.
Usage Levels	Allows the operator to calculate usage levels.
Stock orders	Allows the operator to create/amend/delete a stock order.
Stock Transfers	Allows the operator to complete a stock transfer from within a stock file.
Supplier File	Allows the operator to create/amend/delete a supplier file.
Stock Take Routines	Allows access to the stock check option within the stock check/period end routines option.
End Period	Allows the operator to end current period with the stock check/period end routines option.
Book Stock Orders in	Allows the operator to F6 book in a stock order.
Amend Messages	Allows the operator to maintain messages.
Price Update	Allows the operator to amend the retail price for stock items by exporting the stock database and importing the amended prices with a specific action date.
Stock Reports	Allows operator access to stock reports.

Financials and Reporting

Cash Up Till	Allows the operator to cash up the till they are using.
Run X Report	Allows the operator to run x reports.
Electronic Till Roll	Allows the operator to view the electronic till roll.

Transaction Audit	Allows the operator to view the transaction audit.
Utilities	Allows access to the maintain documents section where operators can create, amend or delete system letters.
Maintain Analysis Codes	Allows the operator to point analysis codes.
Amend Euro Rate	Allows the operator to amend the conversion rate for Euros.
Reports	Allows access to the print standard reports option.
Secure Reports	This option is only used if secure menus are used within the standard customer reports (secure menus must be setup by ESP). The user will be allowed to view the reports within the secure menu.

Configuration

Amend Messages	Gives the operator access to configure system messages which can be applied to receipts, customer displays, booking screens etc.
Amend Sundries	Allows the operator to create/amend/delete sundry keys.
Amend Presets	Allows the operator to create/amend/delete POS presets.
Amend Multi Buy Schemes	Allows the operator to configure multi buys.
Maintain Daily Data	Allows the operator to access the daily data record file to analyse trends in revenue capture in comparison to details such as the weather.
Maintain Groups	Allows the operator to create/amend/delete group codes which are linked to the stock item files.
Maintain Analysis Codes	Allows the operator to point analysis codes.
Maintain Communications	Allows the operator access to maintain the communications module.

F&B Point of Sale

Till Sales	Allows the operator to login and complete standard transactions.
Cash Up Till	Allows the operator to cash up the till they are using.
Run End of Day	Allows the operator to run the end of day process within the retail system.
X Reports	Allows access to the x reports option.
Electronic Till Roll	Allows the operator to view the electronic till roll.
Happy Hour	Allows the operator to switch on/off the happy hour mode. When switched on the system will use a secondary set of prices for sales items.
POS Manager	This option is only required when using point of sale authorisation; the system may be setup so that void, no sale and/or return item will require authorisation when used. POS manager must be enabled for the operator to authorise this.
Day Accounts	Enables the creation, posting and invoicing of day accounts.
Amend Membership	Allows the operator to amend details within a customer file.
Internet Registrations	Allows the operator to register customers for the Elite Live portal.

F&B Sales Item Routines

Stock Routines	Allows access to the stock routines option.
Maintain Sales Items	Allows the operator to create/amend/delete sales item files.
Maintain Modifiers	Allows the operator to create/amend/delete modifiers.
Stock Valuation	Allows the operator to view a current or historic stock valuation.
Usage Levels	Allows the operator to calculate usage levels.

Stock Orders	Allows the operator to create/amend/delete a stock order.
Stock Transfers	Allows the operator to complete a stock transfer from within a stock file.
Supplier File	Allows the operator to create/amend/delete a supplier file.
Stock Take Routines	Allows access to the stock check option within the stock check/period end routines option.
End Period	Allows the operator to end the current period with the stock check/period end routines option.
Book Stock Orders In	Allows the operator to F6 book in a stock order.
Amend Messages	Allows the operator create/amend/delete messages.
Price Update	Allows the operator to amend the retail price for stock items by exporting the stock database and importing the amended prices with a specific action date.
Sales/Stock Reports	Allows operator access to sales and stock reports.

F&B Financials and Reporting

Cash Up Till	Allows the operator to cash up the till they are using.
Run X Report	Allows the operator to run x reports.
Electronic Till Roll	Allows the operator to view the electronic till roll.
Transaction Audit	Allows the operator to view the transaction audit.
Utilities	Allows access to the maintain documents section where operators can create, amend or delete system letters.
Maintain Analysis Codes	Allows the operator to point analysis codes.
Amend Euro Rate	Allows the operator to amend the conversion rate for Euros.
Reports	Allows access to the print standard reports option.
Secure Reports	This option is only used if secure menus are used within the standard customer reports (secure menus must be setup by ESP). The user will be allowed to view the reports within the secure menu.
Print End of Day	Allows operator to print end of day

Amend F&B Configuration

Amend Messages	Gives the operator access to configure system messages which can be applied to receipts, customer displays, booking screens etc.
Amend Sundries	Allows the operator to create/amend/delete sundry keys.
Amend Presets	Allows the operator to create/amend/delete POS presets.
Amend Multi Buy Schemes	Allows the operator to configure multi buys.
Maintain Daily Data	Allows the operator to access the daily data record file to analyse trends in revenue capture in comparison to details such as the weather.
Maintain Groups	Allows the operator to create/amend/delete group codes which are linked to the stock item files.
Maintain Analysis Codes	Allows the operator to point analysis codes.
Amend Multi Buy Schemes	

Booking Permissions

Amend Booking	Enables the operator to create/amend/delete a future individual booking.
Amend Group Booking	Enables the operator to create/amend/delete a future group booking.
Print Book Reports	Enables the operator to access the F8 print option from the bookings screen.
Drop Move Bookings	Enables the operator to move future bookings using the drag and drop function.
Override Capped Slots	This option is only used for sites with the 'Events' functionality. When enabled this will allow the operator to overbook an event
Refund Bookings	Enables the operator to refund a booking that has been arrived/paid.
Maintain Events	Enables the operator to override the maximum numbers and cancel the event.
Amend Activities	Enables the operator to create/amend/delete activity files.
Amend Resources	Enables the operator to create/amend/delete booking resource files.
Amend Exports	Enables the operator to create/amend/delete web booking exports.
Amend Locations	This option is only used for sites with the 'Events' functionality. Enables the operator to create/amend/delete booking locations. By default, this option is locked and would require a check code from ESP to access.
Amend Templates	This option is only used for sites with the 'Events' functionality. Enables the operator to create/amend/delete booking templates.
Maintain Calendar	Enables the operator to access the calendar from the booking screen and amend prices/profiles and opening/closing times for a defined period of time.
Maintain Booking Views	Enables the operator to create/amend/delete booking views. By default, this option is locked and would require a check code from ESP to access.
Maintain Questionnaires	Enables the operator to create/amend/delete booking questionnaires.
Maintain Activity Messages	Enables the operator to create/amend/delete booking messages.
Maintain Activity Prices	Enables the operator to amend the price for the currently selected activity on that specific day.
Add Booking Maintenance	Enables the operator to block areas of the booking screen for maintenance purposes. This is not standard functionality and must be enabled by an ESP representative.
Add Booking Allocation	Enables the operator to block a percentage of a highlighted area of the booking screen. This also enables the operator to amend any booking screen notes using F11 from the bookings screen.
Amend Evet Detail	This option is only used for sites with the 'Events' functionality. Enables the operator to manually amend this minimum and maximum number of people allowed to book onto this event.
Create Ad Hoc Events	This option is only used for sites with the 'Events' functionality. Enables the operator to add an event without creating a template
Maintain Feeds	Allows the operator to amend RSS availability feeds.
Amend Staff File	This option is only used with the 'spa' functionality. Enables the operator to amend the Spa Staff Files.
Restricted Arrival	This option must be unticked if the operator is responsible for arriving bookings.
Amend Promotion Codes	Operator is able to create/amend/delete promotion codes.
Amend Membership	Enables the operator to amend details within a customer file.
Day Accounts	Enables the creation, posting and invoicing of day accounts.
Maintain Course Participants	Allows the operator to add or amend participants to a course as part of the Elite course and Achievement Module.
Internet Registrations	Allows the operator to register customers for the Elite Live portal.
Amend Booking Status	Allows the operator to amend the booking status against bookings if this functionality is enabled
Hold Booking Moves	Allows the operator to place therapist bookings into layaway when moving

	a booking when all resources are in use.
Amend Event Pricing	Allows operator to add, amend or remove resources to an event booking
Activity Price Types	Allows price types to be amended in the PMS module.

Configuration

Needs to be ticked to allow access to configuration modules.

Financials

Must be ticked to allow access to all financial options including end of day.