

Setting up access roles

Access roles in PowerEPOS

ESTIMATED TIME 15 minutes

An access role decides what a member of staff can do on the POS — which discounts and surcharges they can apply, which corrections they can make, and which parts of the system they can reach. Roles are built in the Users module and then published out to your terminals.

Before you start

- Access to the PowerEPOS Management Console.
- A clear idea of what this role should and should not be allowed to do.

Creating an access role

1

Open the Users module

From the PowerEPOS Management Console, select **Users**.



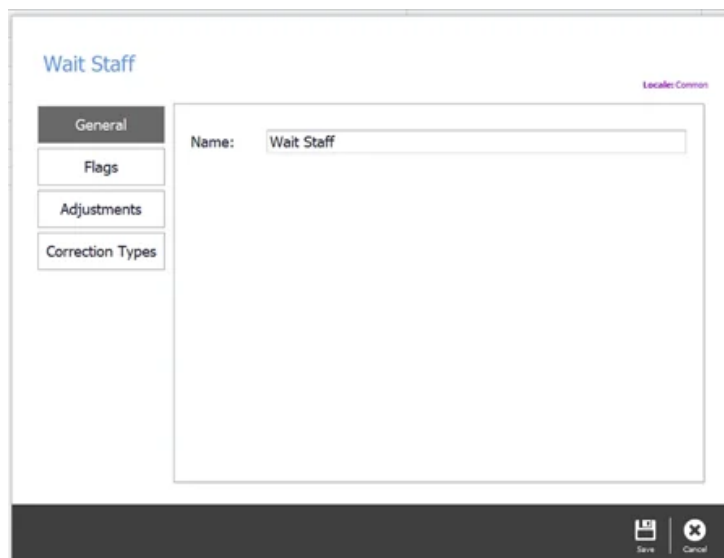
2 Start a new role

Select **New** directly beneath **Access Roles** to open the Access Roles Configuration window.



3 Name it and open Flags

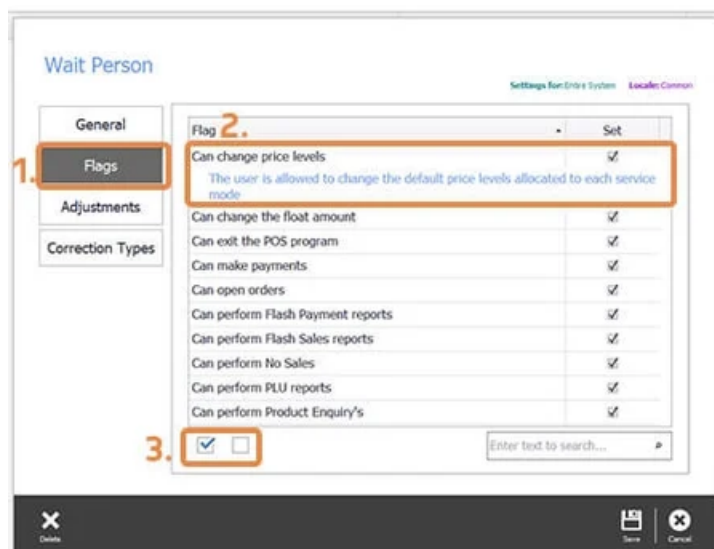
Give the role a name, then select **Flags**.



Setting what the role can do

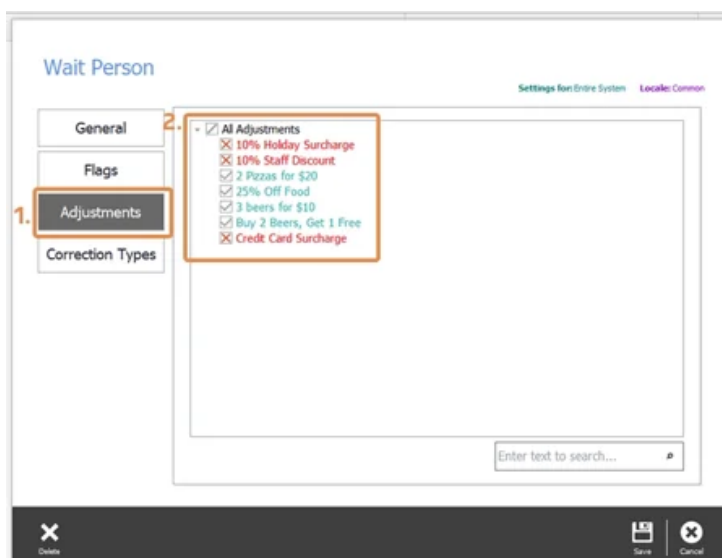
4 Work through the flags

Flags are the individual permissions, each one on or off. Select a flag to read what it does. The checkboxes below the descriptions turn the whole set on or off at once.



5 Choose the adjustments

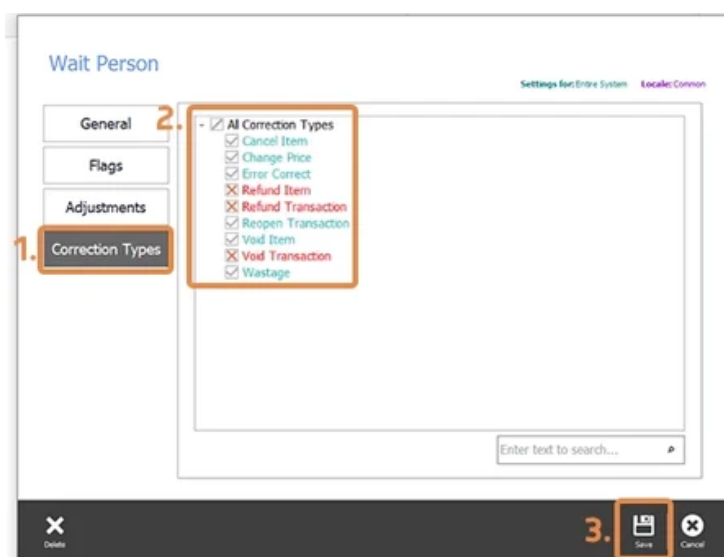
Adjustments is the list of discounts and surcharges this role may process. For a wait person, clear the ones that should need a manager.



6

Choose the corrections

Then pick the **Corrections** the role is allowed to make, and select **Save** in the control panel to save the role and close the window.



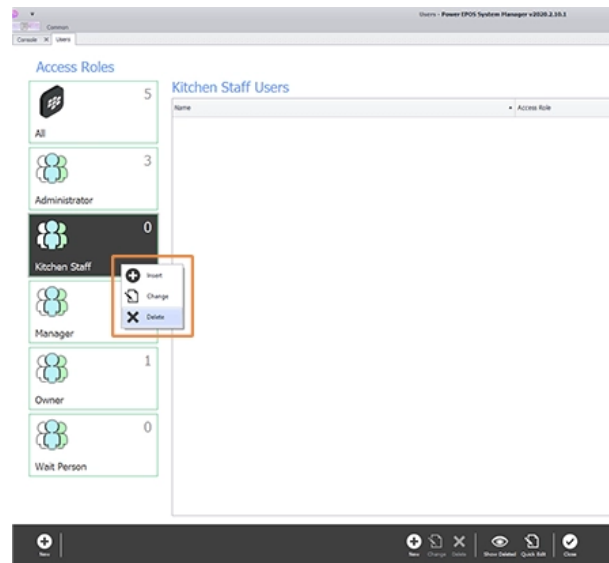
Editing and deleting roles

Double-click a role in the list on the left to open it for editing, then **Save** and **Close** when you are done.

To delete one, right-click it, select **Delete**, and **Save** in the control panel.

NOTE A role with users on it cannot be deleted

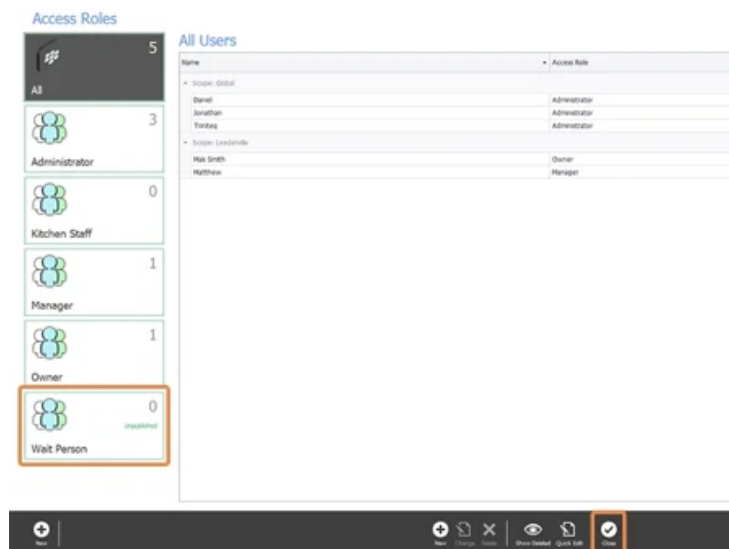
If staff are still assigned to the role you are deleting, they show in red. Double-click each one, give them a different access role, and then come back and delete the role.



Publishing to the POS

7 Close the configuration window

A new role is marked *unpublished* until you send it out. Select **Close** in the control panel to leave the Access Roles configuration window.



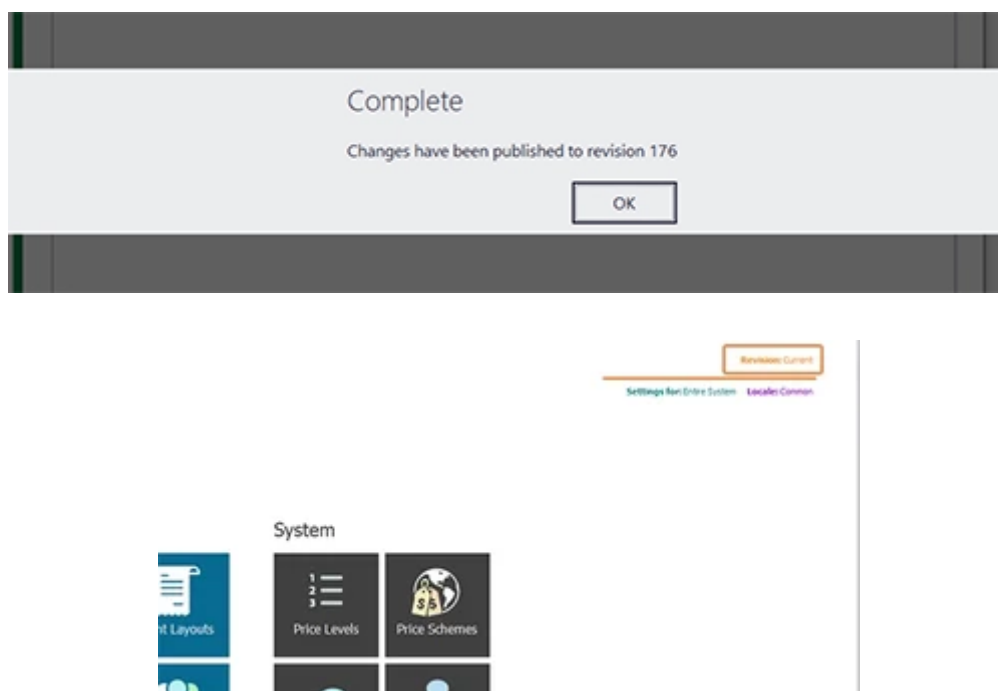
8 Publish

Back in the Management Console, the orange markers on the **Users** and **System** tiles show what is waiting. Select **Publish** at the top right, then check the changes and the outlets, clearing anything you are not ready to send.



9 Keep the revision number

The **Complete** message carries a revision number, which the Revision Management Tool works from. It takes the Publish button's place at the top right of the screen. The role is now available on your terminals, tablets, laptops and other Windows devices.



10 Need a hand? Contact Triniteq Support

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Phone **1300 784 276**

Email **support@triniteq.com**

Our support team is here to help.