Personnel

Basic Information

The personnel section is the area where you add your instructors, admin team members, and receptionists to SwimSoft. Once team members have access to the system, they will be able to access **'Knowledge Base'**, so they can start to learn SwimSoft and help configure the system.

To access the **Personnel Page**, go to SwimSoft's Main Menu, choose any Location and Activity, and then press **System Configuration** and **Personnel**.

Roles

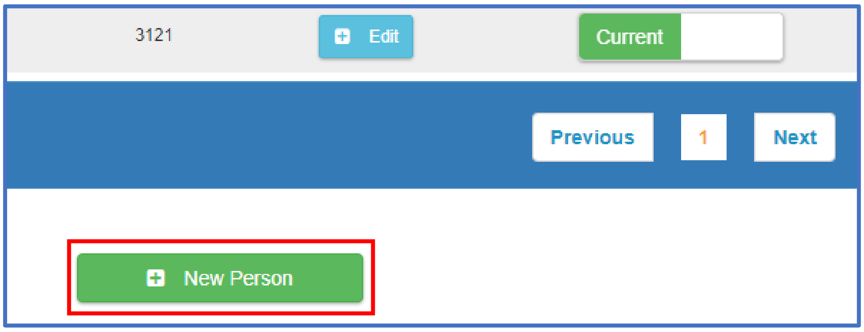
Before you add any team members, you should know that you will be asked to set their roles as you add them to the system. Team members can be assigned one of three roles in SwimSoft, they are as follows.

Admin	These team members have access to all aspects of the system
Instructor	Instructors have access to teaching information but no client data
Receptionist	These team members have the necessary access to place clients onto the courses and manage their records.

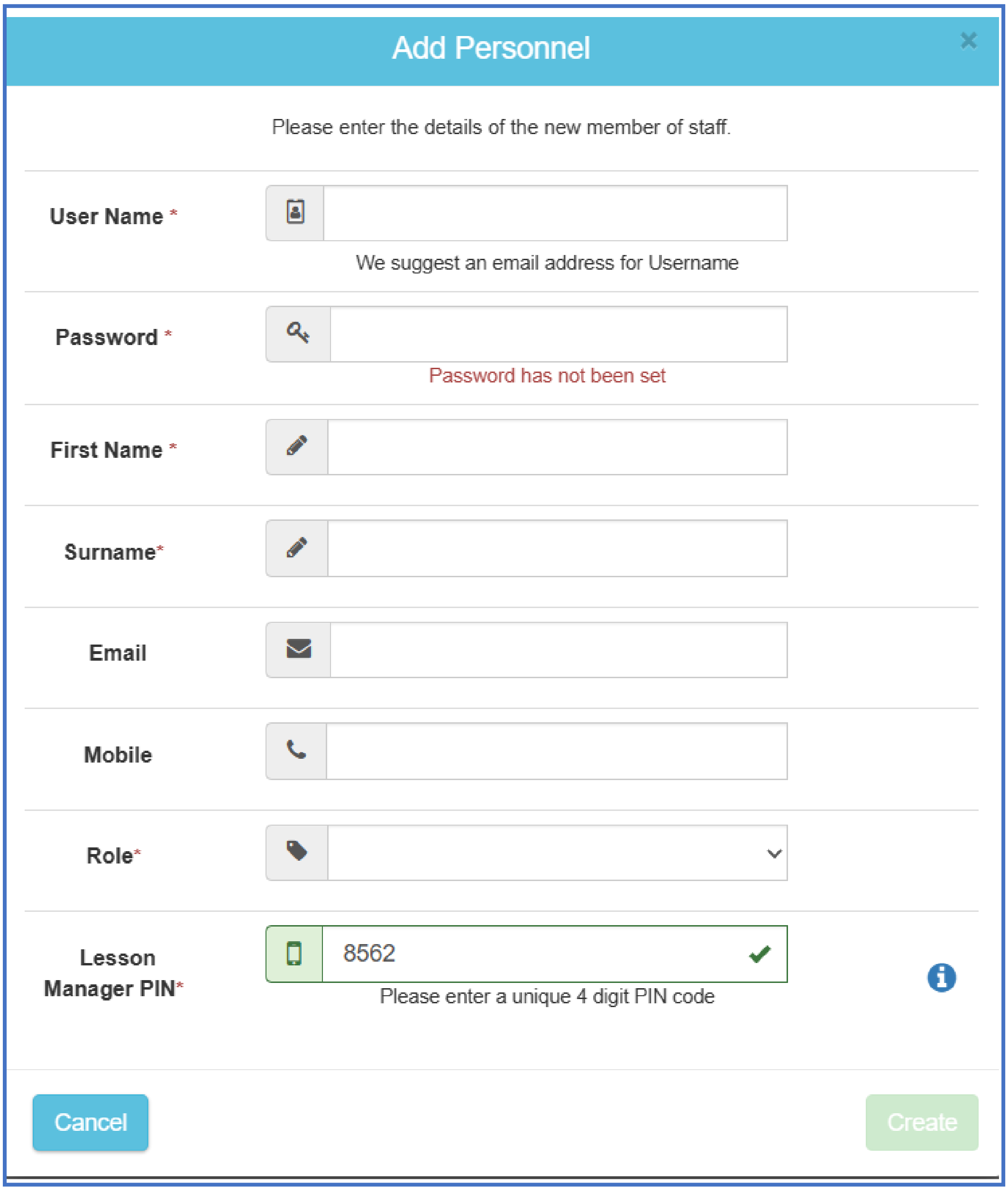
We strongly recommend that you create three Sample personnel accounts, one with each role so you can log in and see that the various roles allow you to access.

Adding a Team Member

This is a simple case of pressing the green **New Person** button found in the bottom right-hand corner of the screen.



Once you have, the following pop-up form will appear.



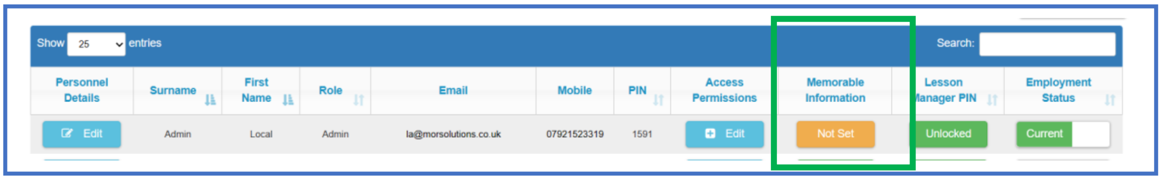
You will need to complete all details that are marked with a red Asterix. Create a username and password that will be simple for the user to remember. Usernames must be unique, so many administrators use their team member's email addresses as usernames.

A password can be easily changed at any point in time by typing in a new value and pressing **Save**.

You do not need to add the team member's email address or mobile number as you create their account, they will be prompted to add this information and create their 'Memorable information' when they log into the system for the first time. The email address and mobile number entered will be used for password recovery purposes.

They must create their memorable information as soon as you have created their account.

You will be able to clearly see which team members have not created their memorable information as this will be displayed as Not Set in the Memorable Information column.



SwimSoft will automatically allocate each team member a four-digit numeric PIN for use with the Lesson Manager module, these PINs can be changed but they must be unique and not be easy to guess. If you create a duplicate PIN or choose an unacceptable PIN, you will be notified and asked to set a new PIN. There are actually two lists of unacceptable PINs. The first is 'Full' or 4-digit PIN which is unacceptable and the second is the 'Containing' list where your PIN can't start or finish with the three numbers shown.

3210	Full
1234	Full
4321	Full
2345	Full
5432	Full
3456	Full
6543	Full
4567	Full
7654	Full
5678	Full
8765	Full
6789	Full
9876	Full

000	Containing
111	Containing
222	Containing
333	Containing
444	Containing
555	Containing
666	Containing
777	Containing
888	Containing
999	Containing
123	Containing

Once all details have been completed, click the green **Create** button to save the details and create the users' accounts.

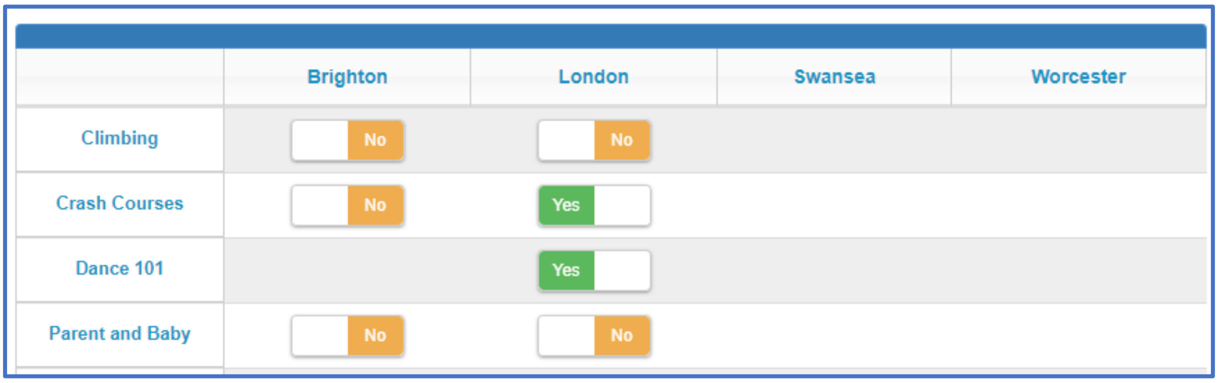
Access permissions

The access permission page allows you to define which **Locations and Activities** a team member will be working at and should have access to. You can see the '**Edit**' button that opens the **Access Permissions** page in the image above.

If you are configuring a system, no locations or activities will have been set and this button will be greyed out. As you proceed through the configuration process, specifically configuring an activity at a location, you will be asked to set which team members are allowed access to it, so you will not need to return to this page to set permissions.

If, however, your system is operational and you are adding a team member, the '**Edit Access Permissions'** button and the page that it opens make it easy to define what location and activities a team member should have access to. It also makes it easy to see what access a team member has and to reduce access if required.

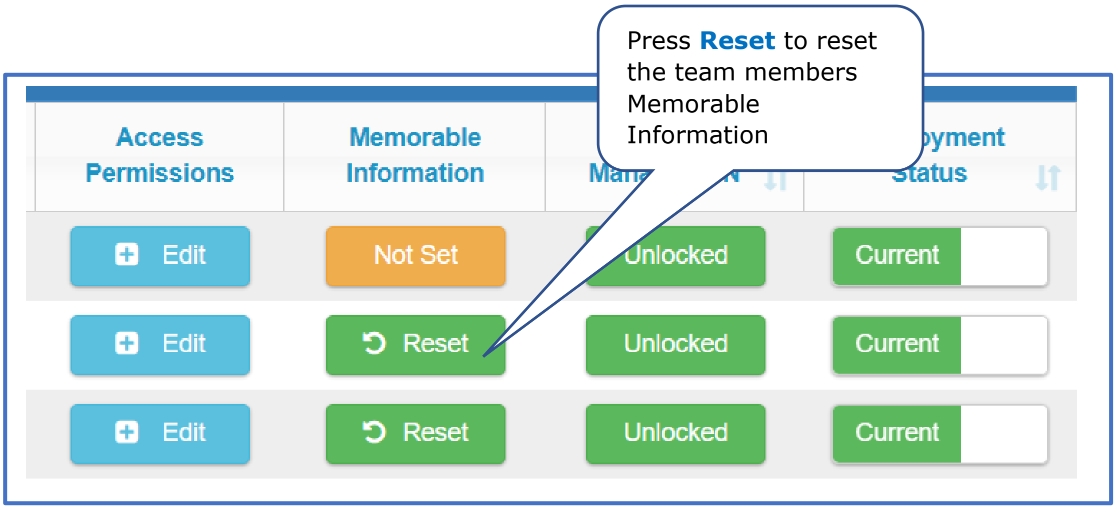
To use the page, simply set the sliders as desired and press OK, the team members '**Access**' will be saved as you change them.



	Brighton	London	Swansea	Worcester
Climbing	No	No		
Crash Courses	No	Yes		
Dance 101		Yes		
Parent and Baby	No	No		

If a team member forgets any element of their login, you can access their username and password, by pressing Edit next to their details and supplying them with these details.

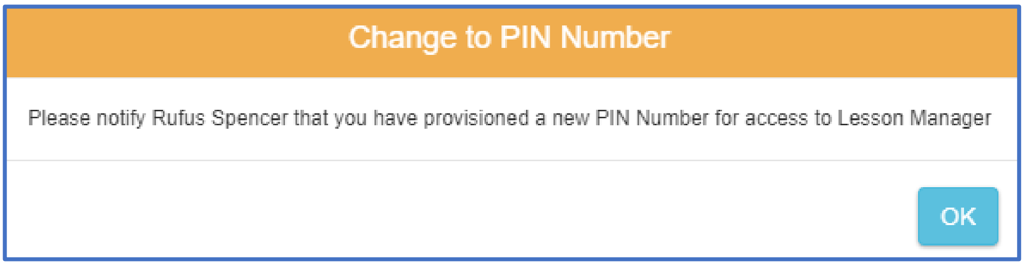
If they have forgotten their Memoriable Information you can reset this by pressing the green **Rest** button under the **Memoriable Information** column. A pop-up message will confirm that you would like to reset the Memoriable Information, if you would like to proceed press **Reset**.



The search bar in the top right corner of the screen makes it easy to find team members quickly.

If any personnel data is incorrect, it can easily be corrected by pressing the **Edit** button located in front of the person's name. Once you have made the desired changes, press the green **Save** button to store them.

Once you press '**Save**', you will see a pop-up message advising your team member that they have been allocated a PIN to access the Lesson Manager part of the system (Poolside Web App)



Instructors and Administrators now have appropriate access to two elements of SwimSoft Online, these being:

1. The core '**SwimSoft Online**' application to view and manage their students on either a PC or tablet, pre and post-lesson delivery.

2. **Lesson Manager**, the Web App designed to support instructors on the poolside.

Accessing SwimSoft

To log in to SwimSoft, users should follow the link below and enter their Username and Password.

https://www.morleisure.co.uk/Portal/ms3rs_login.asp

When they follow the link above for the first time, they will be required to enter…

1. An email address
2. A mobile number
3. Their desired 'Memorable Information

Instructors must complete the actions detailed above before they can access the **'Lesson Manager'** system.

Accessing Lesson Manager

To access Lesson Manager, instructors should follow the link below.

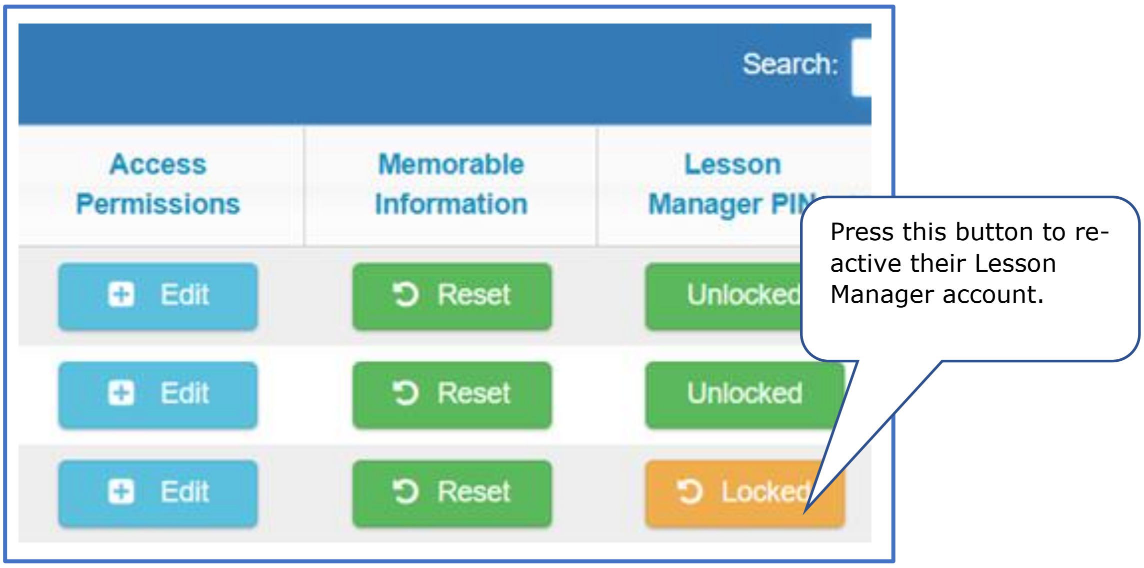
https://www.morleisure.co.uk/LessonManager/RO_PSM_L.asp

Once they have navigated to the page, they should save the link as a favourite to their devices' home screen. This will make it easy for them to access the Lesson Manager system in the future.

Please note:

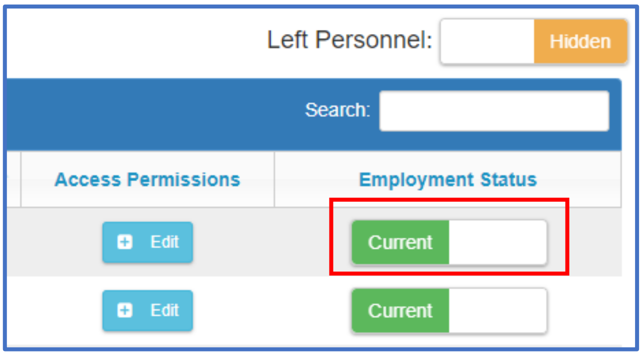
- The Lesson Manager system requires Wi-Fi, 4G or 5G connection on the poolside.
- The first time the system is used each day, the device it is being accessed on and its network connection will be verified. This process is completed automatically after the instructor enters their ***PIN*** and elements of their ***Memorable Information***. Once the device is verified, users will only have to enter their PIN to access the system throughout the day.
- Memorable Information is case sensitive
- Only lessons being delivered on the day will be displayed.
- If a PIN is entered incorrectly five times, the user will be locked out of the Lesson Manager system until the next day or until it is unlocked using one of the two methods detailed below.
    - A colleague entered their details correctly on the device being used.
    - Admin can unlock the PIN by pressing the Amber Locked button under the Lesson Manager PIN

Please note that the Unlocked green button, means the Lesson Manager Pin is active and the team member's account is not locked. If you see the Amber Lock button, the will mean the user has tried up to five times to log in to Lesson Manager and you will need to reset the account by pressing this button.

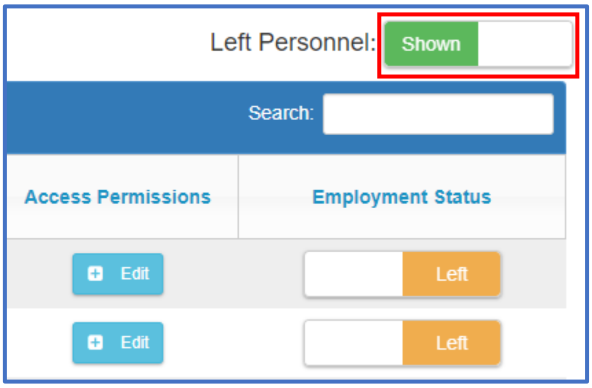


Team members leaving and re-joining

You cannot delete a team member. If a member of staff has left your organisation, please mark them as ***Left*** by using the slider associated with their record, found on the right of the screen under **Employment Status.**



If a person re-joins your team, they will already have a personnel record which will require their '**Employment Status**' to be changed from '***Left***' to '***Current***'. By default, all team members marked as ***Left*** will not show when you access the **Personnel** page. To see them, toggle the ***Left Personnel*** slider found in the top right corner of the page to the '***Shown***' position, and if necessary, use the search bar to find the team member.



Once you can see their name change their employment status to '***Current***', this action will open a pop-up which will require you to set their new roles. Once you have set it as required, press **Save**.