Employee Window

To Access the 'Employee Details' Window

From the OPTO ribbon, select the 'Resources' tab and **click** on the 'New/Edit Employees' icon. The 'Employee Details' window in OPTO is used to enter/access all the employee information such as contact details, and position, security settings and internal password, QA issues, etc.



Details Tab

General information including Employee Name, Address, Email Addresses, Position, and Shifts. Also access to attachments and the individual employee calendar.

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More Info Tab

There an area for Comment, as well as options to attach files and set-up access to Purchasing limits and accounts, workcenter access and job information.

Employee							
Emp No: Er	mployee Name or Surname	; (Given Name:	Middle Name:	Initial:	Current Shift:	
1 🔽 J	IONES		Robert	В		Shift 1	→ 1
Details More In	nfo Security Emp Sched	Pictures Not	es QMS				
Comments:							
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File Attachm	nents						
	Description			Filename			
1							
Limit Purcha	asing to these Accounts		Limit Work to	these Workcenters		Current Job	
Acc Cod	e Account Descri	otion	wc	Workcenter Descript	ion		
						Last Job/Date	
						1125-7*1	
	Start Time:	12:12:56	C	a. 117			
			Current Jobs P	labr		WC Nesting No.	Stan
	Mau Durahara Amaruta		1	1003		WC Nesting No	step
	Max Purchase Amount:						

Emp Sched Tab

This tab displays all the current jobs scheduled for the employee, the client code, Workcenter and due dates of the job.

💷 Employee								- • 💌
Emp No:	Employee Name	or Surname:		Given Name:	Middle Name:	Initial:	Current Shift:	
1 👻	JONES			Robert	В		Shift 1	→ 1
Details More	Info Security	Emp Sched	Pictures Not	es QMS				
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Sch Curr Job	s Curr Job No	WC CI	ient Code		Job Description		Due Date	Dummy



Picture Tab

This tab enables the user to attach a photo of the employee and also a copy of their signature.



Security Tab

This tab has all the security setting for the different functions within OPTO.

🗈 Employee							
Emp No: Employee Name or Surnan	ne: Given Name:	Middle Name: Initia	l: Current Shift: 🖉				
1 - JONES	Robert	В	Shift 1 👻 1				
Details More Info Security Emp Sche	d Pictures Notes OMS						
Signature Purchase	Check - Clock Time	Send Production	Order -> History				
Change Client Code	Check - Jobs	Back from Histo	ry <- Production Order				
Change Supplier Code	Despatch Awaitin Add Trans	port 🗹 Cancel - Produc	tion Order				
Show Financial History (Clients)	Change Revision Tick in Parts	Send Client Ord	er -> History				
Show Financial History (Suppliers)	🗹 Change Material Code	Back from Histo	ry <- Client Order				
🗹 [3] Hide Despatch Amount	🗹 Delete Material	🗹 [3] Credit Order	s and Purchase , Orders Only				
🗹 Change Part Code	🗹 Change Material Stock	🗹 Cancel - Client (Drder 🔄 Return Goods				
Delete Parts	Lock/Unlock Parts for Editing	Create Invoice	Change Credit, Desp Stop				
Change Parts Stock	Save Changes to Locked Parts	Show Job Cost S	creen ON-Hold (Clt)				
Create New Part Code	Substitute Items	🗹 Edit History Ord	er Book 🗌 ON-Hold (Prd)				
Create New Material Code	🗹 Update Parts Cost Price	🗹 Change Part Pro	duction Stop				
Password Despatch (Production)	Allow Part Sell Price change (setup	Param Client) 🗹 Show A	ll Doc's (Incl No Public Access)				
Password Despatch (Client Order)	Show Supplier Total		\$ / Min \$ / Hr				
Password Material Delivery	Show Client Total Show Pick	Date (Clt Callup) Emp	Cost: .6666 40.00				
Update - Parts (Utility)	[3] Show Order/Invoice Total, plus	Cost Supe	rvising: ,0000 .00				
Update - Material (Utility)	Use Div for selected Reports	Change Pick					
Add NCR or ECR	Point Of Sale Access	Commission Chai	ge: 1.0000 60.00				
🗹 QA - NCR/ECR (Complete)	🗹 Change Due Date in Order Book	Boss Rating: 1	 Qualifications apply 				
[3] Quote Fast Markup (Override)	Purchase Restrict	Show Callup Amt	udaet:				
Release Client Orders	Stock Take Restrict	-					

Notes Tab

This enables 'Notes' to be recorded in relation to this employee, these notes may be in relation to Performance Appraisals, Workplace



Procedures, Training, etc.

Employee		
Emp No: Employee Name or Surname:	Given Name: Middle Name: Initial: Current Shift:	Ð
1 JONES	Robert B Shift 1	→ 1
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Category: <any> Sub Category</any>	/: <any> Action: <any> Dearch</any></any>	6
Notes:		
Not Vote Date Category Sub-Catego	ry Emp Notes Info	Act Done
1 10264 01/07/13 666 31	2 bdhhafliuehyt	NO

QMS Tab

This tab displays all the Quality Assurance issue that the employee has responsibility to action and/or resolve.

III Employee				
Emp No: Employee Name or Surname:	Given Name:	Middle Name: Initia	al: Current Shift:	
1 JONES	Robert	В	Shift 1	→ 1
Details More Info Security Emp Sched	Pictures Notes QMS			
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QA/NCR:				
Track 🔻 Date Category	Sub-Category Emp	QA Info		Comp

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