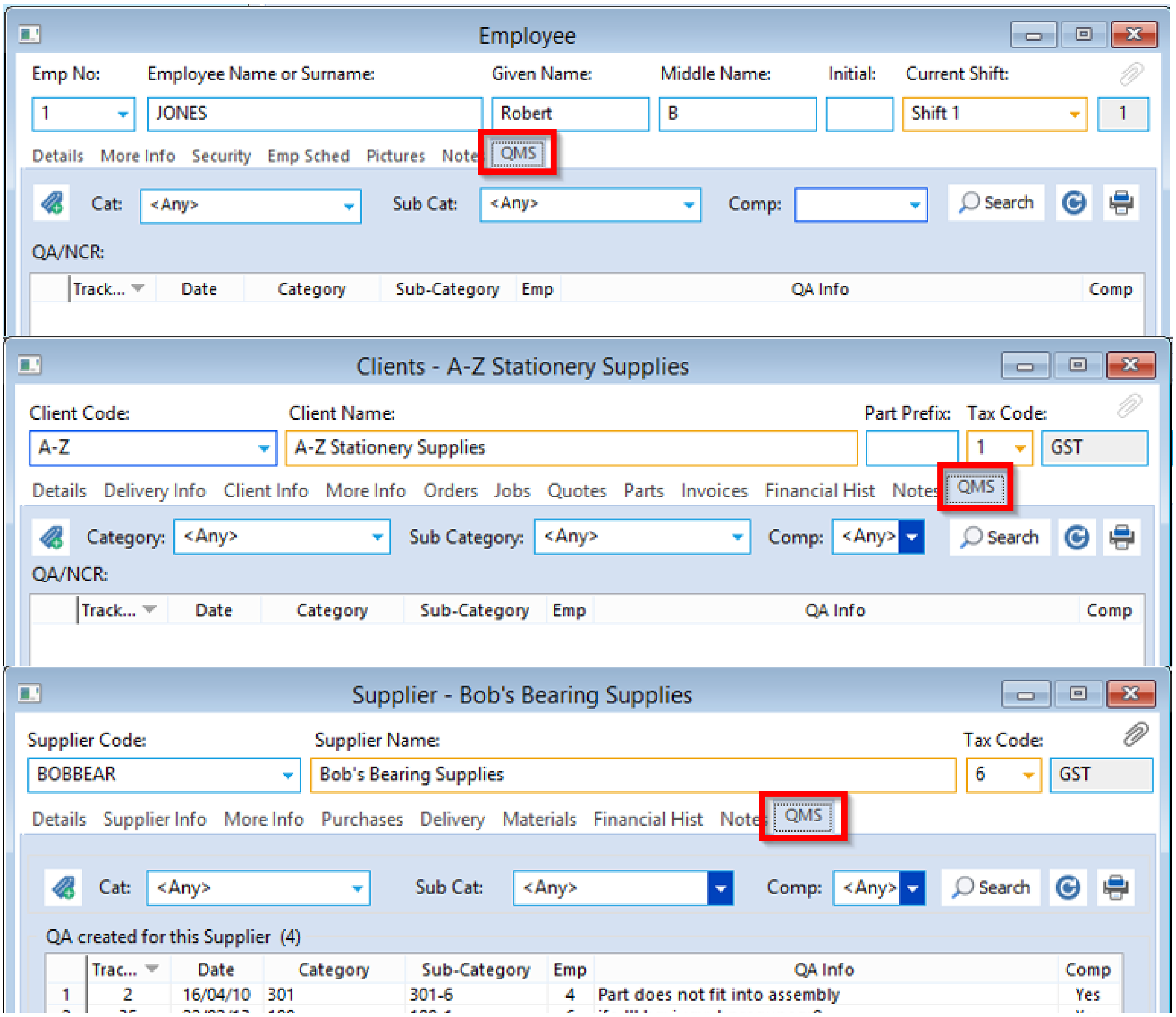
View, Add or Edit NCR/ECR (QMS) Records from other Windows

Overview:

Quality Assurance/NCR/ECR records can be viewed, created and/or edited from the following windows-

- Client Details
- Supplier Details
- Employee Details

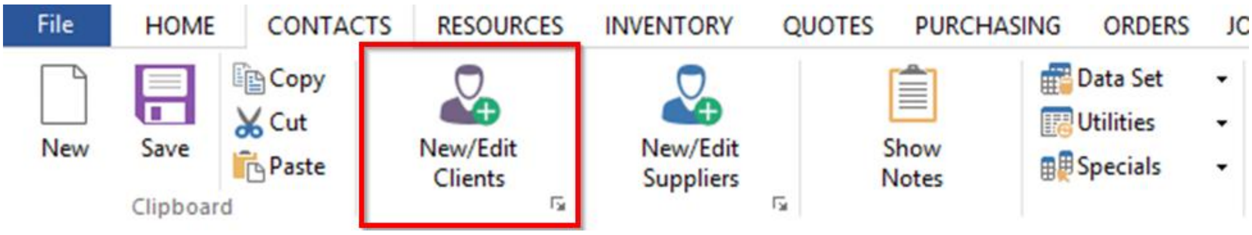
All the QMS NCR/ECR records relating to any of these entities are listed on the relevant 'QMS' tab. This tab is always the last tab to the right of the main window. To access the 'QMS' tab, open the appropriate window as pictured below and **click** the 'QMS' tab (circled below).



For this Example, the 'Client' has been Selected

To Access These Records

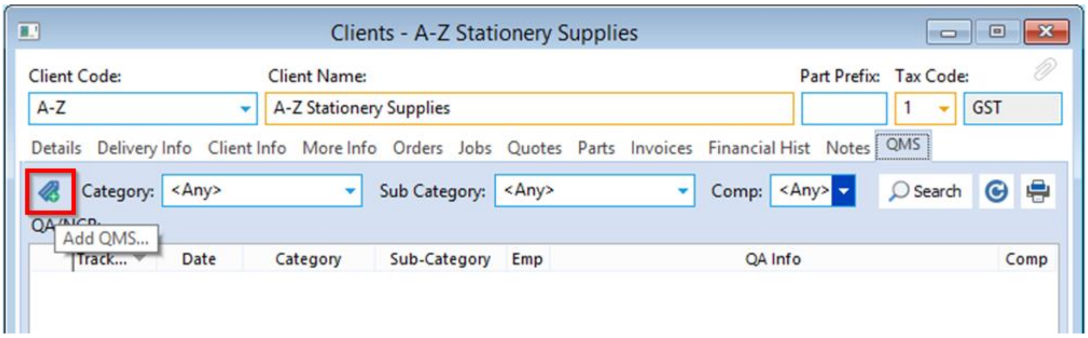
From the OPTO ribbon, select the 'Contacts' tab and **click** on the 'New/Edit Clients' icon to open the 'Clients' window.



In the 'Clients' window select the ***Code*** field and **press <F2>** then select the client from the pop-up list and **click** OK. **Click** on the 'QMS' tab, all the QA/QMS records in relation to that client are displayed on this tab.

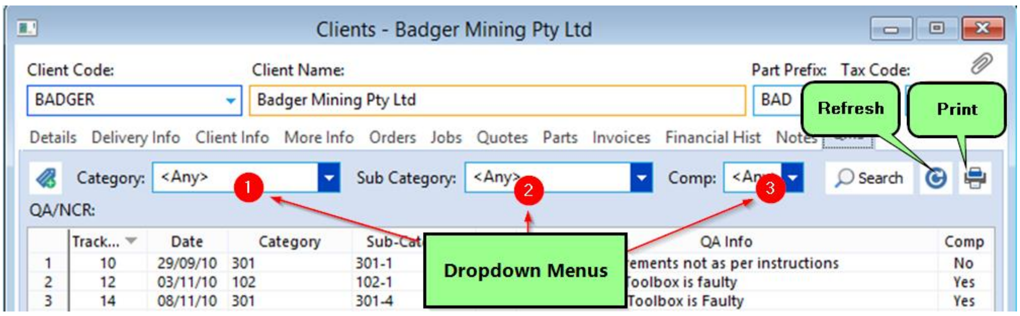
To Create a New NCR/ECR (QA) Record in Relation to the Client

Click on the 'Add QMS' button (circled below).



To View/Edit Existing Records

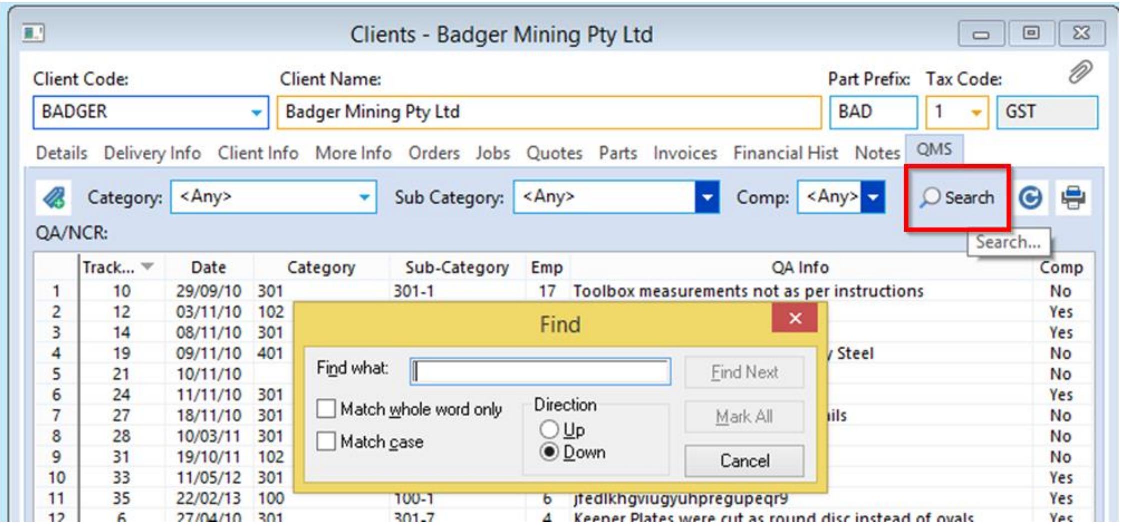
Dbl-click on the required tracking number of a NCR/ECR (QA) to open the selected record. To view records by a Category, Sub-Category or Complete, select options from the drop menus and **click** on the 'Refresh' button.



To print a list of the records displayed on this tab, **click** on the 'Print' button to open the 'Print Table Data' window, select or de-select to show or hide columns and then **click** on 'Preview' to view and/or print the report. For a full explanation of the printing function, please see *Print Data Table Window*.

To Search Records

The ‘Search’ button (circled below) is used to search all records in the tab by a key word(s).



Ensure to **press <F9>** after editing to save any changes.