2010-920 - Creating a New Document for Document Management Function

Overview:

Company documents such as Orientation documentation, Policies and Procedures, Health & Safety documentation, Training records, etc. can be linked to the Quality Management System in Opto. The Quality system enables companies to have easy access to all types of documentation in one convenient location. The Documentation component is protected and the user will need permission and an internal password to be able to access feature. This password is different to the password used to logon to Opto.

Open the **QUALITY** Tab and **click** on the 'New Document' icon, and then **click** on the 'Create New DOCS' icon.

File	HOME	CONTACTS	RESOURCES	INVENTORY	QUOTES	PURCHASING	ORDERS	JOBS/SCHEDULING	INVOICING	QUALITY	Μ
New	Save	Copy	QA/NCR	& New QA/NCR	Insp/Cal	Rew li	nsp/Cal m Insp/Cal	Documents	io New Document Change Request	Data Se	et → s → ls →
	Category		QA/NCR 🖼		Inspection/Calibration		Document Ma				

The 'Create New Document' window opens -

Step 1- Enter your password, and click on the Green Arrow icon.

Create New Document	
Welcome	
Step 1 - Please enter your ITMS user password.	
-	Ð

Step 2 - Enter a short summary/name for the document. The description the user enters here will be the name displayed in the "Show all Docs" window. **Click** into the orange drop-down arrow to select from the "Document Category" pop-up list, these would have been set-up previously. **Click** <u>OK</u> and then **click** on the **Green Arrow** icon to proceed to next step.

Code	Description	Last No	<u>O</u> K
FC	Flow Chart	1001	
• O	Forms	2001	Cancel
OP	Operating Procedures	3002	
PD	Position Description	4001	
PP	Policy Procedures	5001	
QM	Quality Manual	6001	
WH&S	Workplace Health & Safety	7001	
WI	Work Instruction	8001	
o 2 - Ple	ase enter a short summary of this document.		

The "Document Management (New)" window opens - The orange drop-down arrows contain previously set parameter lists for the different fields to select a code from the different click on the drop-down arrow and select from the lists and then **click** <u>OK</u>.

The "Author" and "Owner" fields are automatically generated with the USER who is logged on assigned employee number and name who is creating the new record, this can be changed if not applicable. The "Responsible Position field will also automatically generate with the assigned position to the author and may be changed to suit the document. In the example below the document is a *Workplace Health and*

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Safety Policy so the author field has been change to employee 6 - *Bronwyn Brown* who holds the position of *Workplace Health and Safety Officer*. Type in the "Retention" and "Revision" fields and continue with the "Review" fields.



Click on the **Browse for a Document** button to find the required document by browsing to its location on your computer system. **Click** on the document to highlight, and **click** on **Open**. The filepath to the document appears in the "Filename" field. A Template for the document may also be linked to this record. To enter a template, enter the type in the "Template" field and repeat the process for the document as above. The **View Attached File** button is used to open and view the document.

Document Mana	gement (Nev	w) - <new e<="" th=""><th>ntry></th><th></th></new>	ntry>							
Doc ID: PP5001 Title: Workplace Health and Safety Policy										
Template Reference Name:										
Details Synopsis Access Reviews Related Docs										
Author: 6	✓ Br	ronwyn BRO	WN	Retention 1 Rev: 0001 Year(s)						
Owner: 1	- Ro	obert JONES								
Responsible Position	- W	/orkplace He	alth & Safety Officer	Days Teal						
Created: 17/	Vext Review Date									
File Type: .PDF	Ē	Filename:	L:_OPTO_DOCUMENTATION\OPTO_HF	\Opto Help Files\Opto Help - Word I 警						
Template: .DOC	E	Filename:	L:_OPTO_DOCUMENTATION\OPTO_HF	\Opto Help Files\Opto Help - Word I 😰						
Hyperlinks to view attached files										
Area: 101 🗸		/orkplace He	alth & Safety	Browse for the Document to be						
Type: DOC	- D(ocument		anacheu						
	NEW DOC	CUMENT								
File Type: .PDF Template: .DOC Hyperlinks to view attached files acc gory Area: 101 Type: DOC NEW 0		Filename: E:_OPTO_DOCUMENTATION\OPTO_HF Filename: E:_OPTO_DOCUMENTATION\OPTO_HF Policy Procedures Workplace Health & Safety Document DOCUMENT		IF\Opto Help Files\Opto Help - Word I						







The "Synopsis" tab has an area to enter a summary of the document.

Document Management (New) - <new entry=""></new>							
Doc ID: PP5001 Title: Workplace Health and Safety Policy							
Template Reference Name:							
Details Synopsis Access Reviews Related Docs							
Synopsis:							
The Work Health and Safety Act 2011 (the WHS Act) provides a framework to protect the health, safety and welfare of all workers at work. It also protects the health and safety of all other people who might be affected by the work. All workers are protected by the WHS Act.							
The WHS Act also provides protection for the general public so that their health and safety is not placed at risk by work activities.							
The WHS Act places the primary health and safety duty on a person conducting a business or undertaking (PCBU). The PCBU must ensure, so far as is reasonably practicable, the health and safety of workers at the workplace. Duties are also placed on officers of a PCBU, workers and other persons at a workplace.							
All duties under the WHS Act are qualified by the term 'reasonably practicable'.							
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Keywords:							

The "Access" tab is to record the employees that are to have access and the type of access to the document for reviewing, editing and approving the document. This is usually the responsibility of a Quality Assurance team/committee which includes Health and Safety Officer and Management Personnel. The employee who has created the new document record will be automatically entered on this list. This employee can be removed if necessary, **click** on the employee and **press** the <Delete> key on the keyboard. To add more employees to this list, **press** the <1> (arrow down) key on the keyboard to insert a new line or **right-mouse click** on the existing line and select "Insert Row" from the pop-up list. On the new line **click** in the "Pos" field and the position code and then press <TAB> to generate the data for the position.

Click in the access columns to allocate the different option to each individual employee. (See below) Related document filepaths may also be stored in this window. **Press** <F9> to save, the documents are now linked to the Quality Management System.

Document Management (New) - <new entry=""></new>									
Doc ID	PP5001	Title: Workplace Health and Safety Po	licy]				
🗌 Ter									
Details Synopsis Access Related Docs									
	No Public A	ccess V-View	D-Distribution E-Edit	R-Review	A-Ap	pro	val		
	Pos	Pos Description	Current Emp Name	V D	Ε	R	Α		
1	1001	Managing Director	Robert JONES	хх	х	х	x		
2	1010	General Manager		X X					
3	1011	Administration Manager	Lisa LEWINS	X X					
4	1012	Accounts & Payroll Officer	Wendy WELLINGTON	X					
5	1013	Administration Assistant		X					
6	1014	Workplace Health & Safety Officer	Bronwyn BROWN	X X	Х	Х	Х		
7	1015	Quality Control Co-ordinator	Susan PAINTER	хх	Х	Х			
8	3010	Production Manager	Ian CAPTAIN	хх					
9	3012	Supervisor Production	Bruce BLACK	ХХ					
10	3013	Tradesperson	Bob BOUNDARY	х					

