

Create/Edit Positions in the Quality Management Systems

Overview:

The 'New/Edit Positions' feature enables the user to enter all the positions within a company, create more positions, and edit current positions. The positions created by this feature are allocated to employees via the 'Position Wizard' feature of the QMS Module. This feature applies to the positions only, not the actual employee who holds the position.

To Set-up Job Positions

From the OPTO ribbon, select the 'Resources' tab then **click** the 'New/Edit Positions' icon to open that window. **Click** in the **Position Code** field and type in the new position code, **press <TAB>** and type in the **Position Name** field **press <TAB>** again to move to the **Date** field which has been automatically filled or type in the required date. **Press <TAB>** to move to the next field and **press <F2>** to select a 'Division' from the pop-up list and **click OK**. **Click** in the **Generic Code** field, **press <F2>** select from the 'Generic Title' pop-up list, **click OK**, then **press <TAB>** to advance to the **Emp Status** field. This field is in relation to the position not the employee, (Is the position fulltime, part-time, etc).

Code	Description
1	Fulltime
2	Part Time
3	Casual
4	Sub-contract

Continue to the **Reports to** field and repeat process the same as the **Generic Code** field.

To Link a Position Document

The documents used for this feature must be linked to the document management feature of the 'Quality Management System'. See 'Create New Document Record'.

Click in the **Position Doc ID** field press <F2> and select the document from the pop-up list, click **OK**.

NOTE: The documents used for this field must be stored in the QMS system, see *Creating Document Records in the QMS*.

The screenshot shows the 'Job Positions' window with the following fields and values:

- Position Code: 1001
- Position Name: Managing Director
- Date Created: 20/04/2012
- Division: [Empty]
- Active/Inactive: Active (selected)
- Generic Code: 1000
- Full Title: Managing Director
- Generic Title: Administration
- Rank: [Empty]
- Emp Status: 1
- Fulltime: [Selected]
- Reports To: [Empty]
- Title: [Empty]
- Current Owner of Position: Emp No: 1
- Date started: 26/02/10
- Acting Employee: Emp No: [Empty]

The 'Documents' pop-up window displays the following table:

	Doc Id	Date	Type	Document Title
1	HT1014	22/04/2010	DOC	Add A New NCR/ECR in the QMS Module
2	HT1015	22/04/2010	DOC	Edit an NCR/ECR in the QMS Module
3	HT1016	22/04/2010	DOC	Show All NCR/ECR in the QMS Module
4	HT1018	22/04/2010	DOC	Audit / Review and Authorise Documents within the QMS Module
5	HT1019	22/04/2010	DOC	Show all DOCS in the QMS Module
6	HT1020	22/04/2010	DOC	Enter or Edit Positions in the QMS Module
7	HT1021	22/04/2010	DOC	Using the Position Wizard in the QMS Module
8	HT1022	22/04/2010	DOC	Show All Current Positions in the QMS Module
9	HT1023	22/04/2010	DOC	Enter or Edit Inspection Items in the QMS Module
10	HT1024	22/04/2010	DOC	Show All Inspection Items in the QMS Module
11	HT1026	29/04/2010	DOC	Setting up Parameters in QMS
12	HT1027	30/04/2010	DOC	Test Document
13	OP1007	29/04/2010	REC	Maintenance Log - QM201
14	OP3001	13/04/2018	DOC	Workplace Health and Safety Procedure
15	PD2001	21/04/2010	DOC	Position Description WHSO
16	PD2002	30/04/2010	DOC	Position Description - Production Manager
17	PD2003	04/05/2010	DOC	Position Description - Laser Operator
18	PD2004	11/05/2010	DOC	Position Description - Labourer
19	PP1003	30/04/2010	DOC	Workplace Health and Safety Policy
20	PP1004	15/12/2010	DOC	An Important Policy - Testing
21	PP1005	09/03/2012	REC	Testing
22	PP5001	17/05/2018	DOC	Workplace Health and Safety Policy
23	WI1007	19/02/2016	REC	TEST VIDEO

Press <F9> to save entry.

NOTE: When the position has been allocated to an employee via the 'Position Wizard' the "Current Owner of Position" fields in this window will be generated.

To Edit a Current Position

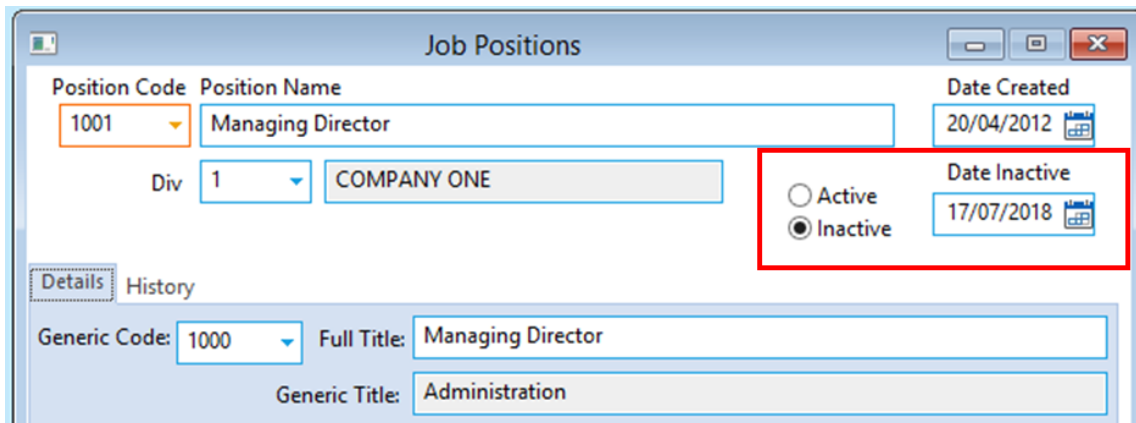
Click in the **Position Code** field, press <F2> to select the position code of the position you wish to edit from the pop-up list, click **OK**. Press <TAB> to generate the window. Press <TAB> to move to through the fields and make required changes and then press <F9> to save.

Managing Positions

An unassigned position can be made inactive if required so it may be use at a later date or is no longer used within the company. Positions no longer in use are made 'Inactive' and not deleted as the position has related information recorded against it that may be used for audits, reports and history records.

To make a Position Inactive

Open the 'Job Positions' window and bring up the position for editing, **click** on the **Inactive** radio button. Enter a date if required and then **press <F9>** to save. To make the position active again, open the position as above, **click** on the **Active** radio button, delete the **Date Inactive** field if required and **press <F9>** to save.

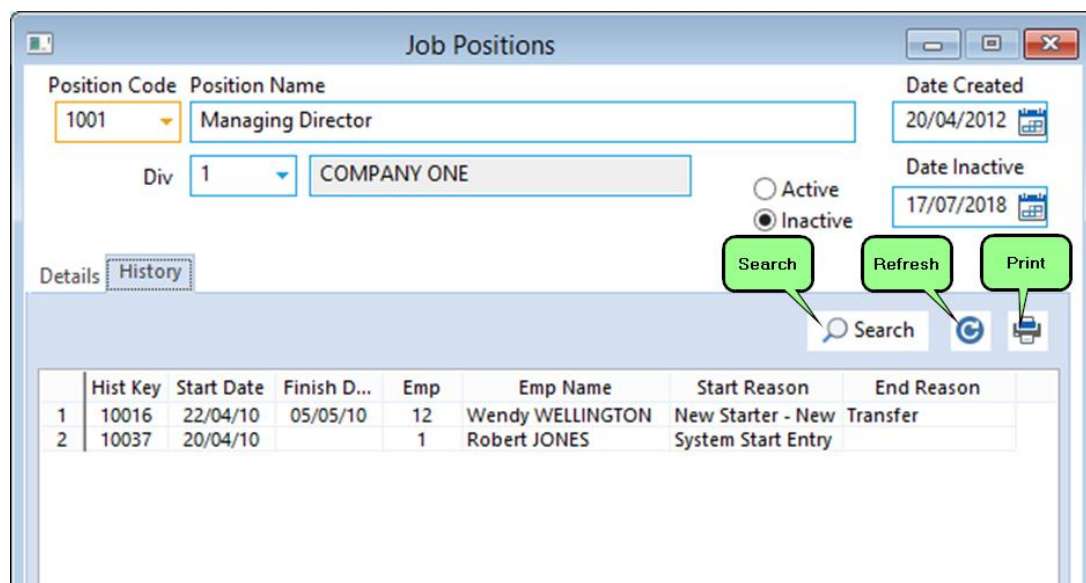


The screenshot shows the 'Job Positions' window with the following fields and values:

- Position Code: 1001
- Position Name: Managing Director
- Date Created: 20/04/2012
- Div: 1
- COMPANY ONE
- Active:
- Inactive: (highlighted with a red box)
- Date Inactive: 17/07/2018 (highlighted with a red box)
- Generic Code: 1000
- Full Title: Managing Director
- Generic Title: Administration

The 'History' Tab

Tracks the history of the position, who held the position and the dates the employee was assigned that position. The History Transaction List for the position can be searched and printed by clicking on the relevant icon.



The screenshot shows the 'Job Positions' window with the 'History' tab selected. The table below displays the history transactions:

	Hist Key	Start Date	Finish D...	Emp	Emp Name	Start Reason	End Reason
1	10016	22/04/10	05/05/10	12	Wendy WELLINGTON	New Starter - New	Transfer
2	10037	20/04/10		1	Robert JONES	System Start Entry	

Additional features shown in the screenshot include a search bar, a refresh icon, and a print icon, all highlighted with green callouts.