

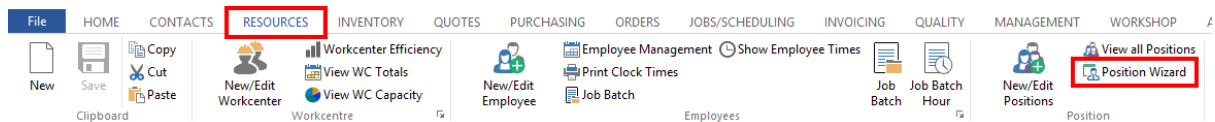
2003-931 - Utilising the Position Wizard

Overview:

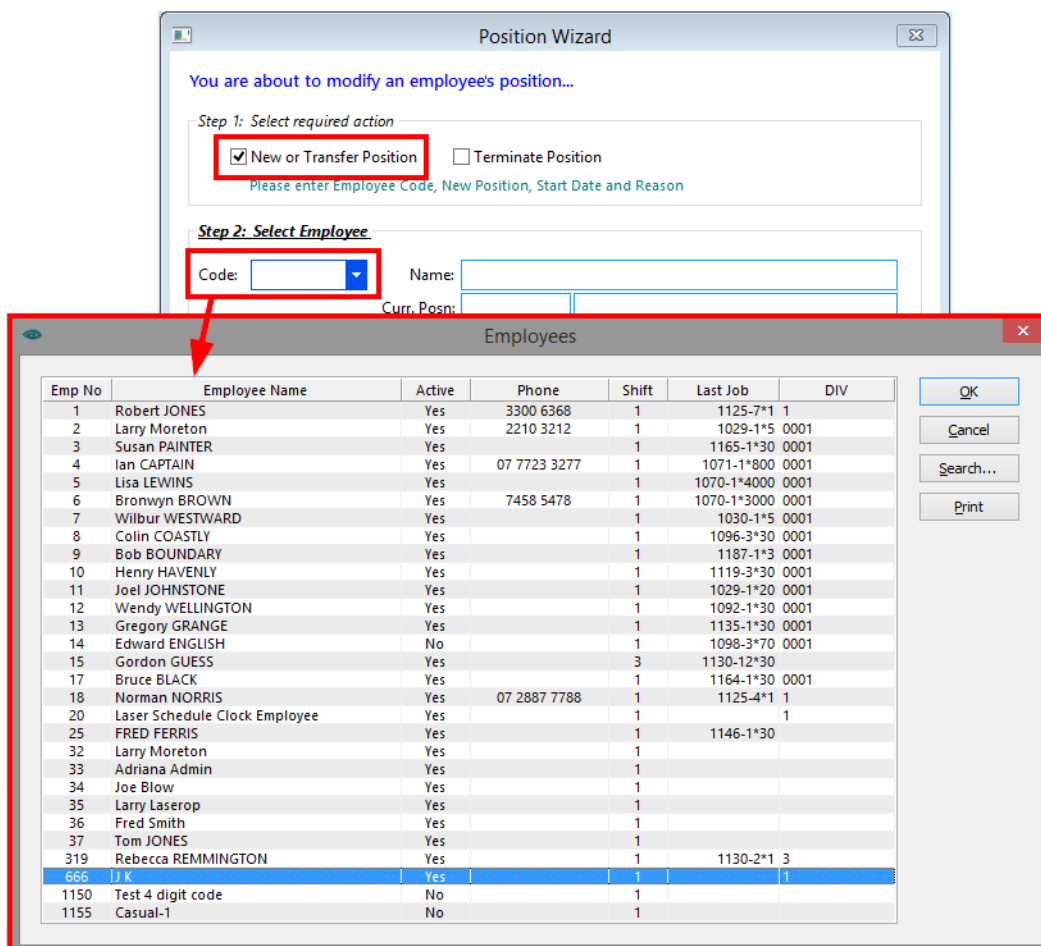
The 'Position Wizard' allows users to allocate, change, or terminate an employee's position within the company. The positions must be set-up prior to using the Position Wizard – *please see Enter/Edit Employee Positions*.

To Allocate a Position to Employee

To allocate a position to an employee, open the **Resources** Tab in the Opto ribbon and **click** on the 'Position Wizard' option to open the window.



Click in the 'Emp Code' and **press** <F2> and select employee from pop-up menu. **Click** on selected employee then **click** **OK** and **press** <TAB> to generate the window. **Click** on the radio button option - "New or Transfer Position", **click** on **Next**.



Click in the “New Position” **press** <F2> and select an available position from pop-up menu and **click** OK. (Only active and available positions will be displayed in the pop-up list). **Press** <TAB> to generate the window and **click** in “Start Date” field and enter date. **Press** <TAB> to move to the “Reason” field, **press** <F2> and select from the pop-up list and **click** OK. The “End Date” field is optional and might be used for a contract position.

Press <TAB> to display this field and **click** on the **Next** button. In the completion window - **click** on the **Apply** button.

To Change a current Employee Position

As per previous instructions, **Click** in the 'Emp Code' and **press** <F2> and select an employee from pop-up menu. **Click** OK and **press** <TAB> to generate the window. **Click** radio button option - "New or Transfer Position" and then **click** on **Next**.

Position Wizard

You are about to modify an employee's position...

Step 1: Select required action

New or Transfer Position Terminate Position

Please enter Employee Code, New Position, Start Date and Reason

Step 2: Select Employee

Code: 666 Name: JK

Curr. Posn: [] []

Start Date: [] Hist. Rec. No: []

Step 3: Enter new position details for the employee

New Position	Position Description	Start Date
3014	Trades Assistant	20/03/19
Reason	Reason Description	End Date (optional)
3	Existing Employee - Position Change	[]

Step 4: Apply Changes

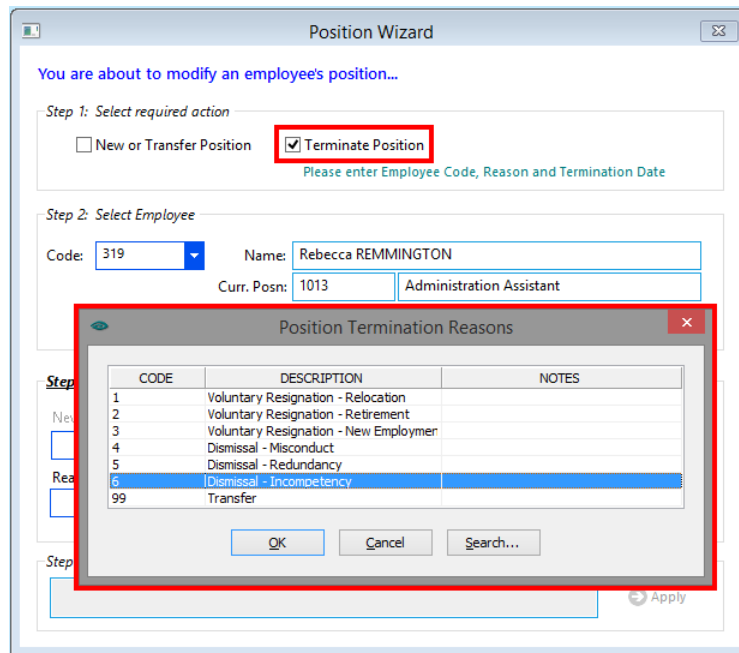
Assign 'J K' to the position of... 'Trades Assistant' **Apply**

Click in the "New Position Code" **press** <F2> and select position from pop-up list and **click** OK. **Press** <TAB> to move to the "Start Date" field and enter the date. **Click** in "Start Reason" field, **press** <F2> select "Existing Employee – Position Change" and **click** OK, and then **press** <TAB> to display this field, **click** on **Next** button.

In the completion window, **click** on the **Apply** button.

To Terminate an Employee Position

To terminate an employee, **click** in the “Emp Code” and **press** <F2> to select the employee to be terminated from the pop-up list and **click** OK. **Press** <TAB> to generate the window. **Click** on the ‘Terminate Position’ radio button option.



Press <F2> and select reason for the termination of the employee from pop-up list and **click** OK. **Press** <TAB> to generate the field and enter the end date.

Step 3: Enter termination reason and end date for the current position

New Position	Position Description	Start Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
Reason	Reason Description	Term'n Date
6	Dismissal - Incompetency	20/03/19

Step 4: Apply Changes

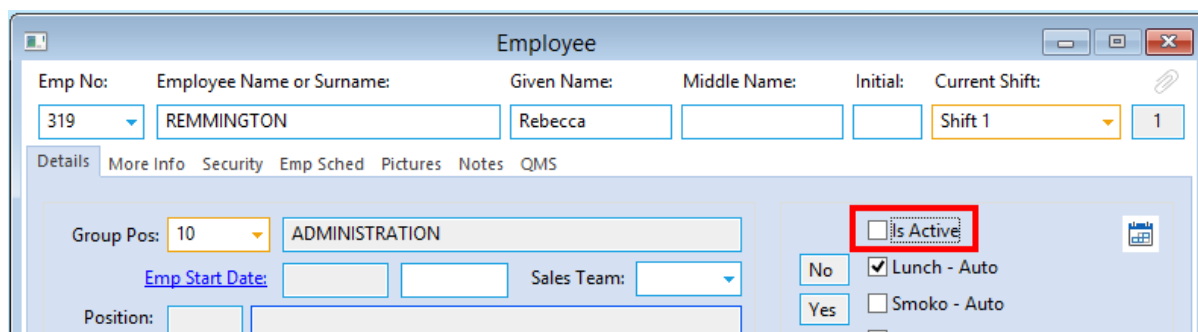
Terminate 'Rebecca REMMINGTON' from the position of... 'Administration Assistant'

Apply

Click on the **Apply** button.

After terminating an employee - open the *Resources* tab in the Opto ribbon, and click on the *Employees* icon. In the 'Emp No' field, press <F2> to select the name of the employee you are terminating from the pop-up list and click OK. Press <TAB> to generate the employee's information in the window.

Un-tick the "Active" box, and press <F9> to save.



The screenshot shows the 'Employee' form in the Opto software. The form is titled 'Employee' and has a window title bar with standard Windows controls. The form contains several fields and tabs. The 'Emp No' field is set to 319, 'Employee Name or Surname' is REMMINGTON, 'Given Name' is Rebecca, 'Middle Name' is empty, 'Initial' is empty, and 'Current Shift' is Shift 1. The 'Details' tab is selected, and the 'Group Pos' is set to 10 (ADMINISTRATION). The 'Emp Start Date' and 'Sales Team' fields are empty. The 'Position' field is empty. The 'Is Active' checkbox is highlighted with a red box and is currently unchecked. Other checkboxes include 'Lunch - Auto' (checked), 'Smoko - Auto' (unchecked), and 'Multi Op - On / Multi Op - Off' (unchecked).