

Optima - Navigation

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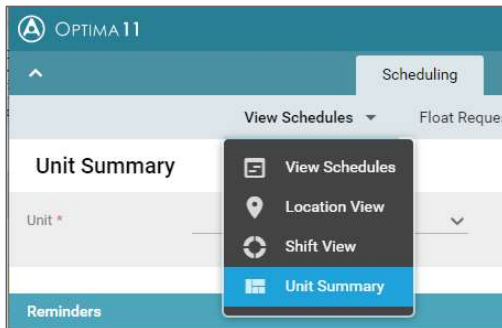
- 1** This is the **Top Menu**.
Click/tap the tabs to select. Selected tabs display in a different color.
The **Scheduling Tab** has been selected below.



- 2** This is the **Sub Menu**.
Depending on which **Top Menu** is selected, different **Sub Menus** are displayed.
A selected **Sub Menu** is shown by a thin blue line as below.

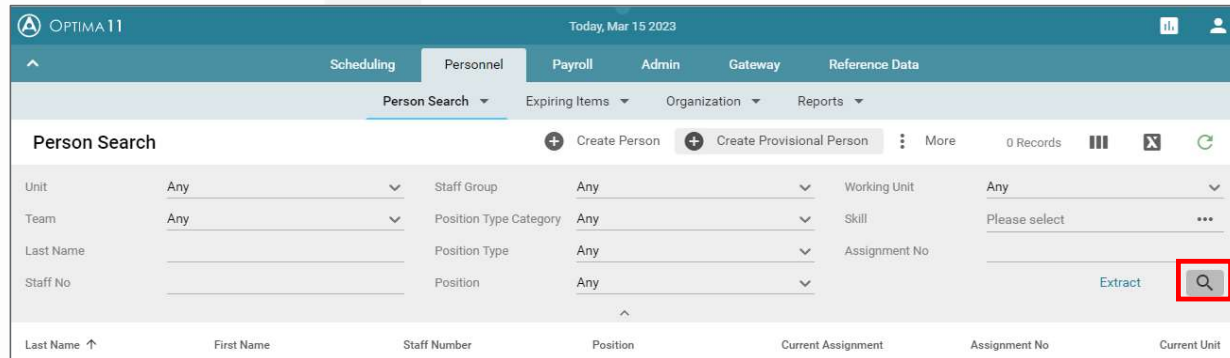


- 3** 1. Selection a **Sub Menu** to present a list of tools.
2. Click/tap to open or right click to open in a new tab.
Note: Your browser tab will also show the open tool name.



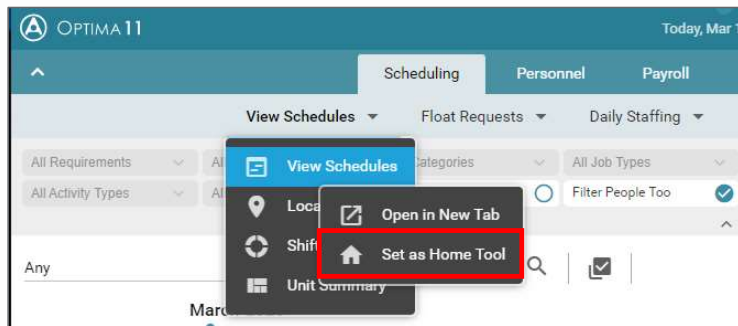
- 4** 1. Complete the **Finder** fields.
Note: Most tools have a **Finder**. This returns all records within the **Finder** filters.
2. Select **Find**  or press the **Enter** key.

The below example is the **Person Search** tool, in the **Personnel** top menu and **Person Search** sub menu.

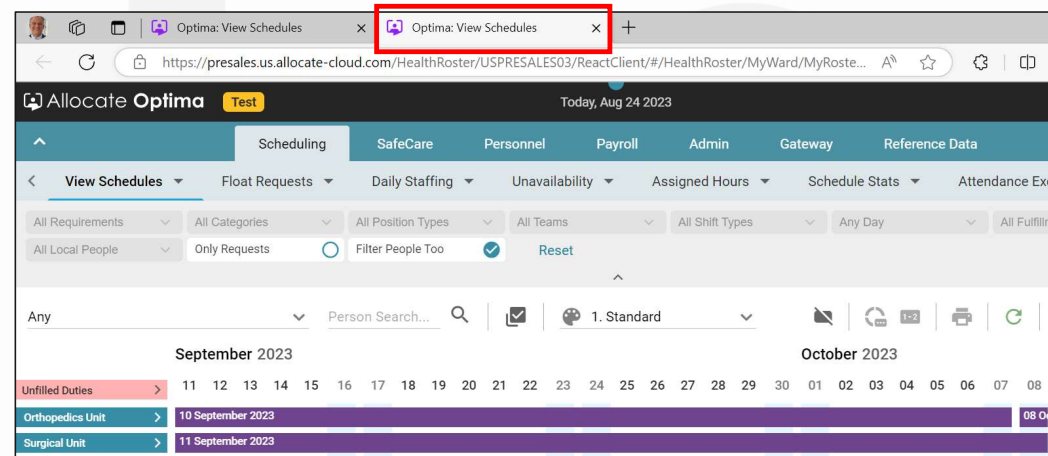


Optima – Navigation (Multiple Tabs)

- 5 Right click on a tool and select **Open in New Tab**, to open **Multiple Browser Tabs**.
A new **Browser Tab** displays.



- 6 1. Select the **new browser**, to view the new tab.
2. Select the browser **X** to close.



Optima – Navigation (Panel Navigation)

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Select a member of staff in the **Grid**, in the Person Search results.
A **Panel displays** on the right

Allocate Optima Test

Person

Simon Richards
Registered Nurse

Float No
Unit Orthopedics Unit
Staff No RLD1122
From Manual

Edit Person
Change Contract
More

Person Search

Unit Orthopedics Unit
Team Any
Last Name
Staff No

Last Name First Names Staff No

Richards	Simon	RLD1122
Wilson	Luke	RLD1123
Brooks	Gloria	RLD1124
Miller	Amy	RLD1125
Carothers	Debbie	RLD1126

Summary

- Work Contracts >
- Unavailabilities >
- Call Off >
- Balance >
- Skills >
- Specialties >
- Salary Uplifts >
- Attributes >
- Contacts >
- Restrictions >

Personal Details

Staff Number RLD1122 Gender -
First Names Simon Last Name Richards
Known As - Date of Birth -
Staff Group Nursing Staff Position Registered Nurse
Hire Date 01/01/2023 Leaving Date -
Visa Required No Agencies -

Employment Details

Employee Type Employee Contract Type Full-time

Most tools have a **Finder**. Each **Panel** has several **Tabs** to choose from in the **Panel Menu**.

Person

Simon Richards
Registered Nurse

Float No
Unit Orthopedics Unit
Staff No RLD1122
From Manual

Edit Person
Change Contract
More

Summary

- Work Contracts >
- Unavailabilities >
- Call Off >
- Balance >
- Skills >

Personal Details

Staff Number RLD1122 Gender -
First Names Simon Last Name Richards
Known As - Date of Birth -
Staff Group Nursing Staff Position Registered Nurse
Hire Date 01/01/2023 Leaving Date -

Each **Panel** has **Actions**. The **Key Actions** are shown in the top right of the **Panel**. The **More** option under the key actions displays additional **Actions**.

Edit Person
Change Contract
More

+ Add Assignment
+ Rehire Person
+ Assign Skill
+ Assign Specialty

Optima – Navigation (Panel Selection)

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Select an item in the Panel, e.g. one of **Person Work Contracts**.

Note: When selecting a **Tab** from the **Panel Menu**, more information relating to that choice is shown on the right-hand side.

Person

Simon Richards
Registered Nurse

Float No
Unit Orthopedics Unit
Staff No RLD1122
From Manual

Edit Person
Change Contract
More

Summary > **Person Work Contracts** 1 Records

Position ↑	Enterprise Work Contrac	Posting	Contracte	Valid From	Valid To	Paysca
Registered Nurse	Substantive	-	36:00	01/01/2023	-	-

A Panel displays over the top of the first Panel.

This second Panel has its own set of **Actions** in the right corner.

Allocate Optima Test

Person

Simon Richards
Registered Nurse

Registered Nurse

Change Contract
Change Basic Rate

Contract Details Contracted Activities Basic Salary Rate

Substantive Contract Details

Staff Group	Nursing Staff
Enterprise Work Contract	Substantive
Position Type	Nurse
Position	Registered Nurse
Payroll	-
Contract Type	Full-time
Valid From	01/01/2023
Valid To	-
Contracted For (Hours Per Week)	36:00
Default Unavailability (Hours Per Day)	08:00

Optima – Navigation (Grid Multi-Selection)

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To select multiple non-adjacent record:

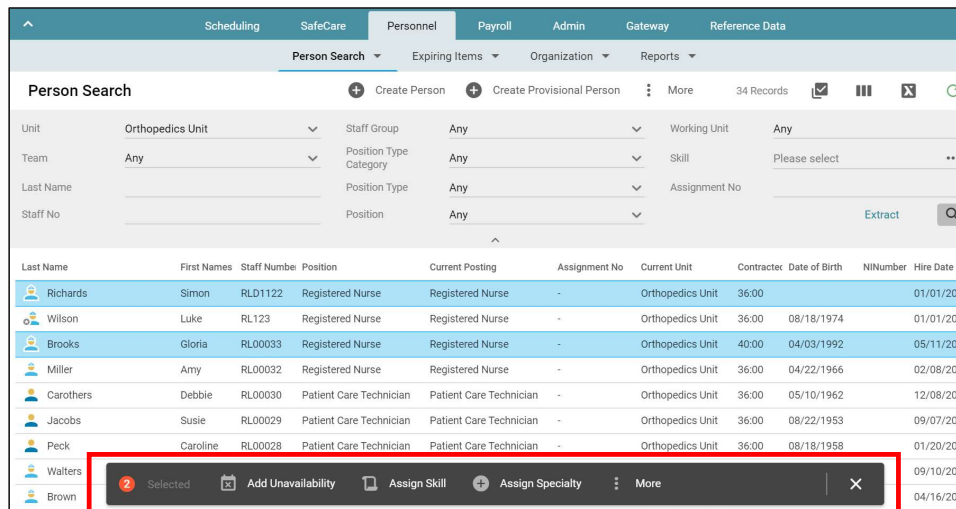
1. Click the 1st record.
2. Press the **Ctrl** key on the keyboard.
3. Click the additional records.

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To select a block of records:

1. Click the 1st record.
2. Press the **Shift** key.
3. Click the last record.

The **Actions bar displays** at the bottom of the screen when more than 1 record is selected. The number of records selected is shown in red on the left.



Last Name	First Names	Staff Number	Position	Current Posting	Assignment No	Current Unit	Contractor	Date of Birth	NINumber	Hire Date
Richards	Simon	RLD1122	Registered Nurse	Registered Nurse	-	Orthopedics Unit	36:00			01/01/2023
Wilson	Luke	RL123	Registered Nurse	Registered Nurse	-	Orthopedics Unit	36:00	08/18/1974		01/01/2022
Brooks	Gloria	RL00033	Registered Nurse	Registered Nurse	-	Orthopedics Unit	40:00	04/03/1992		05/11/2018
Miller	Amy	RL00032	Registered Nurse	Registered Nurse	-	Orthopedics Unit	36:00	04/22/1966		02/08/2021
Carothers	Debbie	RL00030	Patient Care Technician	Patient Care Technician	-	Orthopedics Unit	36:00	05/10/1962		12/08/2013
Jacobs	Susie	RL00029	Patient Care Technician	Patient Care Technician	-	Orthopedics Unit	36:00	08/22/1953		09/07/2015
Peck	Caroline	RL00028	Patient Care Technician	Patient Care Technician	-	Orthopedics Unit	36:00	08/18/1958		01/20/2020
Walters										09/10/2012
Brown										04/16/2012

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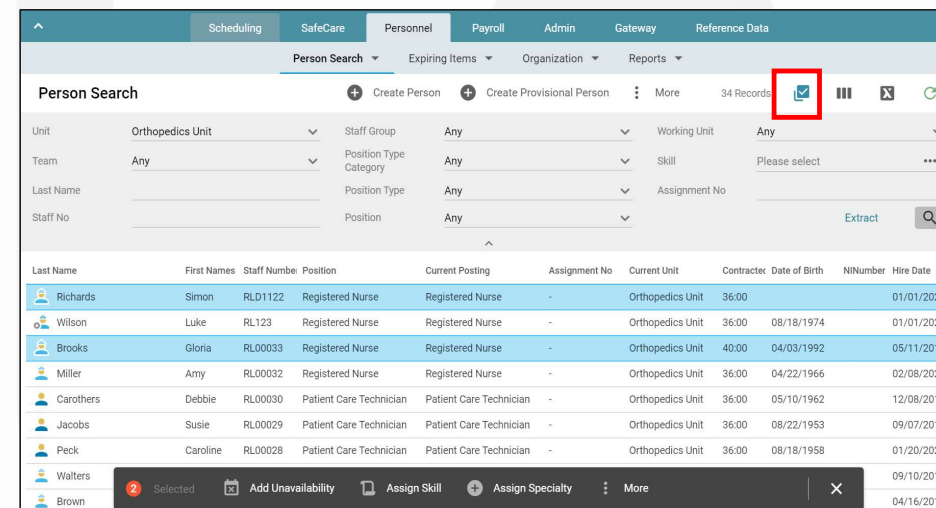
Note: Optima is optimized for tablets.

To select multiple records, on a tablet without a keyboard :

1. Click the **Multi-select toggle button**.

The **Actions bar displays** at the bottom of the screen and the button **will** changes color.

2. Tap the records to select.



Last Name	First Names	Staff Number	Position	Current Posting	Assignment No	Current Unit	Contractor	Date of Birth	NINumber	Hire Date
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Brooks	Gloria	RL00033	Registered Nurse	Registered Nurse	-	Orthopedics Unit	40:00	04/03/1992		05/11/2018
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Walters										09/10/2012
Brown										04/16/2012