



Governors

Managing Meeting Actions

Managing Meeting Actions

1. On the **Meetings** tab, highlight a meeting and select the **Actions** sub-tab at the bottom of the page.
2. To add a new action, click the **Add** button to display the **Meeting Action | Add** dialog. Proceed to **Adding Actions**.
3. To edit an action, highlight it then click the **Edit** button to display the **Meeting Action | Edit** dialog. Proceed to **Editing Actions**.
4. To apply a template of actions to the meeting, click the **Add Actions Template** button to display the **Action Template | Select Template to Apply** dialog. Proceed to **Applying Templates**.

Governing Body Search > Governing Body Details

Governing Body | Abbey Middle School

Composition | Committees | Meetings | Contact Log | **Memo** | UDFs | Basic Details | Default Terms

Meeting Summary

+ New | - Delete | Quick Report

Meeting Date	Action Date	Meeting Type	Meeting Title	Flag	Committee
02/09/2002		AGM	AGM	No	Finance
08/07/2002		Termly Meeting	Summer 2002	No	Finance
03/06/2002		Termly Meeting	Summer Term Meeting	No	Finance
07/05/2002		Finance committee meeting	Quarterly Finance Group Review	No	Finance
15/11/2001	08/07/2002	Governing Body Meeting	Full Business Meeting	Yes	Finance
02/10/2001		Finance committee meeting	Quarterly Finance Group Review	No	Finance
02/08/2000		Termly Meeting	Autumn Term 2002 Meeting	No	Discipline

Meeting Details | Attendance | Memo | **Actions**

+ Add | - Edit | - Delete | + Add Actions Template | Save | Cancel

Date Due	Status	Description	Assigned To	Action To Take
15/04/2013	Outstanding	Meeting action	Chair	

Adding Actions

1. To add a new meeting action:
 - a. Select a **Date Due** and enter an action **Description**.
 - b. Enter **Action to Take**, if required.
 - c. In the **Assigned to** field, select the **Position** or a **Governor** to which this action is assigned.
 - d. Click the **OK** button to display the new action on the **Meetings** tab.
2. Click the **Save** button to save the meeting details.

Meeting Action | Add

Action Details

Governing Body | Abbey Middle School

Meeting Title | AGM

Date Due * | [Calendar Icon]

Description * | [Text Field]

Action To Take | [Text Field]

Assigned to * | Position [Dropdown] | Governor [Dropdown]

Action Taken | [Text Field]

Date Completed | dd/mm/yyyy [Calendar Icon]

Action Set By | on 09/04/2013

OK | Close

Editing Actions

1. To edit a meeting action:
 - a. Update the information as required.
 - b. If the action is completed, select **Date Completed** and the **Status** is changed automatically to **Completed**.
 - c. Click the **OK** button to display the updated action on the **Meetings** tab.
2. Click the **Save** button to save the meeting details.

Meeting Action | Edit

Action Details

Governing Body | Abbey Middle School

Meeting Title | AGM

Date Due * | 15/04/2013 [Calendar Icon] | Status Completed

Description * | Meeting action

Action To Take | [Text Field]

Assigned to * | Position | Chair [Dropdown] | Governor [Dropdown]

Action Taken | [Text Field]

Date Completed | 15/04/2013 [Calendar Icon]

Action Set By | on 10/04/2013

OK | Close



Applying Templates

1. Highlight the required template in the **List of Templates** to display the **List of Template Actions**.

The **Due Day** is the number of days relative to the meeting date that the action is due to be completed. It is a negative value if this is prior to the meeting. The **Description** and **Assigned To Position** are displayed.

2. Click the **OK** button to apply the template.

3. Click the **Save** button to save the meeting actions.

List of Templates		
Description	Governing Body	
Template 1	Abbey Middle School	

List of Template Actions: Template 1		
Due Day	Description	Assigned To Position
-10	Send out agenda	Clerk
-5	Distribute report	Treasurer

Meeting Date	Action Date	Meeting Type	Meeting Title	Flag	Committee
02/09/2002		AGM	AGM	No	Finance
08/07/2002		Termly Meeting	Summer 2002	No	Finance
03/06/2002		Termly Meeting	Summer Term Meeting	No	Finance
07/05/2002		Finance committee meeting	Quarterly Finance Group Review	No	Finance
15/11/2001	08/07/2002	Governing Body Meeting	Full Business Meeting	Yes	Finance
02/10/2001		Finance committee meeting	Quarterly Finance Group Review	No	Finance
02/08/2000		Termly Meeting	Autumn Term 2002 Meeting	No	Discipline

Date Due	Status	Description	Assigned To	Action To Take
23/08/2002	Overdue	Send out agenda	Clerk	
28/08/2002	Overdue	Distribute report	Treasurer	

Searching for Actions

After meeting actions have been added via the **Meetings** tab, they can be retrieved using the **Meeting Actions Search**.

1. Select the **Meeting Actions** button from the primary navigation bar to display the **Meeting Actions Search** page.
2. Enter search criteria and click the **Search** button to display the **List of Meeting Actions**.
3. If required, to edit a meeting action, highlight it then click the **Edit** button to display the **Meeting Action | Edit** dialog.

Date Due	Status	Description	Meeting Title	Body	Assigned To	Action To Take
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Related Reference Guides:

- **Primary Navigation**
- **Manage Meetings**
- **Manage Templates**