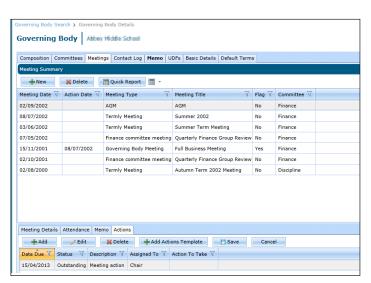


Governors

Managing Meeting Actions

Managing Meeting Actions

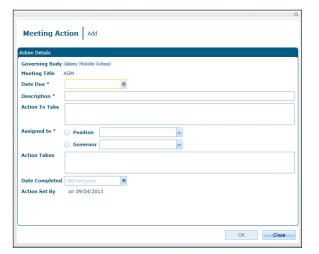
- On the **Meetings** tab, highlight a meeting and select the **Actions** sub-tab at the bottom of the page.
- To add a new action, click the Add button to display the Meeting Action | Add dialog. Proceed to Adding Actions.
- To edit an action, highlight it then click the Edit button to display the Meeting Action | Edit dialog. Proceed to Editing Actions.
- 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.



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.

Adding Actions



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 Abbay Middle School						
Meeting Title AGM						
Date Due *	15/04/2013 Status Completed					
Description *	Meeting action					
Action To Take Assigned to *	Position Chair					
Action Taken	Governor					
Date Completed	15/04/2013					
Action Set By	on 10/04/2013					
	OK Close					

1



Governors

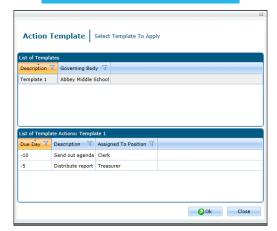
Managing Meeting Actions

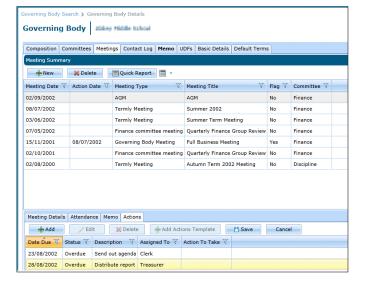
 Highlight the required template in the List of Templates to display the List of Template Actions.

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.

Applying Templates





Searching for Actions

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

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

One Home Governing Body	Governors Meeting Actions Act	ction Templates Reports	Links			
Action Enquiry						
Meeting Actions Search						
🔊 Action Details						
Governing Body	Status	Date From	Assigned to Governor			
		10/10/2012				
Committee	Person Set By	Date To	Assigned to Position			
		dd/mm/yyyy ·	•			
Description						
√ Search						
List of Meeting Actions						
✓ Edit Delete						
Date Due Status Description Meeting Title Body Assigned To Action To Take						



Related Reference Guides:

- Primary Navigation
- Manage Meetings
- Manage Templates



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