



# Governors

## Managing Governor Details

### Managing Governor Details

1. Select governor details using either **Governing Body Search** or **Person Search** to display the **Governor Details** page.

**Governor Basic Details** are read-only. The **Appointments Details** tab is displayed. It lists all appointments for this governor.

2. On the **Appointment Details** tab, double-click on the required appointment to display the **Appointment Details** window (read only).

Body Name	Governor Type	Voting	Start Date	End Date	End Reason
Teacher in Gov Body - Central Board	Foundation	Yes	01/04/1992	31/03/1996	
Harold Primary Middle School	Headteacher	Yes	01/09/1990	01/09/1994	

### Displaying Training Manager Courses

On the **Governor Details** page, select the **Training Manager Courses** tab to display any courses booked for this governor via the One Training Manager module.

Course code	Course title	Status	Start date	Qualification obtained
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### Adding Training Courses

1. On the **Governor Details** page, select the **Training Others** tab to display training courses that have been booked for this governor without using the Training Manager module.

Double-click on a training course to display the **Training Summary Details** dialog.

2. Click the **Add** button to display the **Training Summary Details | New Training** dialog.

3. Enter details of the training course and click the **Save** button.

Training Date	Level	Description	Days	Qualification Obtained
20/03/2013	Level 2	Training for staff 2		Advanced Level



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### Managing Disclosure Checks

1. On the **Governor Details** page, select the **Disclosure Details** tab.
2. Select a disclosure check in the **Disclosure Checks** list and click the **Edit** button to display the **Disclosure Check** dialog.  
Alternatively, click the **Add** button to add a new disclosure check.
3. On the **Disclosure Check** dialog:
  - a. Enter an **Application Ref** and **Disclosure Ref**, if required
  - b. Select **Date Requested**.
  - c. Select **Clearance Type**.
  - d. Select **Date Cleared** or **Not Cleared Date**, if required.
  - e. Click the browse to display the **Person Search** dialog and select a **Countersignatory**, if required. **Countersignatory Ref** is automatically completed.
  - f. Select a **Reply Destroy Date**.
  - g. Enter an **Invoice Number** and **Invoice Amount**, if required.
4. Click the **Save** button.

### Displaying Meeting Attendance

On the **Governor Details** page, select the **Attendance** tab to display the details of meeting attendance for this governor.

Select an **Attendance** record in the list and click the **Open** button to display **Governor Type Details**, **Position Details** or **Committee Details** for this governor.

Date	Governing Body	Meeting Type	Attendance	Non Attendance Reason
20/03/2013	Widely Middle School	Notice of Meeting	Yes	
05/04/2013	Widely Middle School	AGM	Yes	
30/04/2013	Widely Middle School	Termly Meeting	Yes	

### Displaying Roles

On the **Governor Details** page, select the **Roles** tab to display a list of roles held by this governor.

Role/Post	Establishment	Start date	End date
Head Post 1	Widely Middle School	01/01/2010	
Head Post 3	Widely Middle School	01/01/2012	
Co-opted Business	Widely Middle School	25/03/2013	24/03/2017



### Recording a Memo

1. a. On the **Governor Details** page, select the **Memo** tab.
2. Enter a memo for the selected governor.
3. Click the **Save** button.

The screenshot shows the 'Governor Details' page for Miss Rachael Stewart. The 'Memo' tab is selected. The form includes fields for Title (Miss), Surname (Stewart), Given Name (Rachael), Gender (Female), Disqualified Date (dd/mm/yyyy), and Email. There is a 'Quick Report' button. Below the form is a large text area for entering the memo, with a 'Save' button and a 'Cancel' button. The page also has tabs for Appointment Details, Training Manager Courses, Training Others, Disclosure Details, Attendance, Roles, Memo, and Actions.

### Managing Meeting Actions

1. On the **Governor Details** page, select the **Actions** tab.
2. Select an action in the list and click the **Edit** button to display the **Meeting Action | Edit** dialog.
3. Update the meeting action details, if required and click the **OK** button to display the **Governor Details** page.
4. Click the **Save** button.

The screenshot shows the 'Governor Details' page for Miss Rachael Stewart. The 'Actions' tab is selected. Below the form is a 'List of Meeting Actions' table with columns: Date Due, Status, Description, Meeting Title, Body, Assigned To, and Action To Take. There are 'Edit' and 'Delete' buttons above the table.

The screenshot shows the 'Meeting Action | Edit' dialog box. It has tabs for 'Action Details' and 'Edit'. The 'Action Details' tab is selected. The form includes fields for: Meeting Title (AGM), Date Due (15/04/2013), Status (Completed), Description (Meeting action), Action To Take, Assigned to (Chair), and Date Completed (15/04/2013). There is also an 'Action Set By' field with the value 'on 10/04/2013'. The dialog has 'OK' and 'Close' buttons at the bottom.



#### Related Reference Guides:

- Primary Navigation
- Display Governor Details