**Reference Guide** 



**Governors** Managing Governor Details

#### Managing Governor Details

 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.

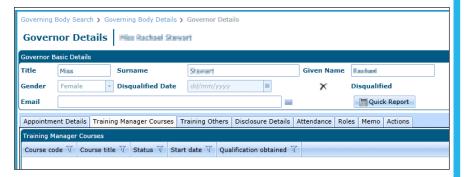
2. On the **Appointment Details** tab, double-click on the required appointment to display the **Appointment Details** window (read only).

Person Sear	rch > Gove	ernor Details										
Governor Details   Hr Station Hadrew												
Governor Ba	asic Details	6										
Fitle	Mr	Surr	name	Ha	iphaw -			Given N	ame 👩	bephan		
Gender	Male	• Disq	jualified Date	da	l/mm/yyyy			×	Di	isqualifi	ed	
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Appointment Details Training Manager Courses Training Others Disclosure Details Attendance Roles Memo Actions												
Appointments												
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Body Nam	e	$\overline{V}$	Governor Type	<del>ا</del> ک	Voting \	Start Date 🟹	End	Date 🟹	End Reas	ion 7		
Teacher in	BOC Berns	Comes Mosse	Foundation		Yes	01/04/1992	31/0	3/1996				
Harmold Pri	iary Middle	Kadenasti	Headteacher		Yes	01/09/1990	01/0	9/1994				
												]
Appointme		Hr stophen Hayle	hai	٣	Alerts 🚮 SQL N	23 tail Merge						

Type *	Headteacher	-	~	Voting	
Start Date *	01/09/1990	-			
End Date	31/08/1994	85			
Political Affiliation	1	*			
Address Type	Governing Body	~			
Address					
End Reason		-			

#### **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.

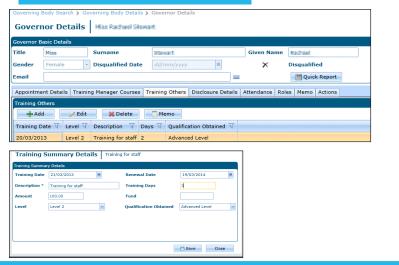


# **Adding Training Courses**

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.

- 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.





**Reference Guide** 

# **Governors** Managing Governor Details

#### **Managing Disclosure Checks**

- 1. On the **Governor Details** page, select the **Disclosure Details** tab.
- 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 Applcation 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.

Governing Body Search > Governing Body Details > Governor Details
Governing Body Search > Governing Body Details > Governor Details
Governor Details
Title
Hiss
Surmame
Gender
Female
Disqualified Date
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	5/02/2013	Clearance Type *	Enhanced
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Date Cleared 27	7/02/2013	Not Cleared Date	dd/mm/yyyy
Countersignatory	r Gara Walch	Q.	
Countersignatory Ref 36	636272818	Reply Destroy Date	dd/mm/yyyy
Invoice Number		Invoice Amount	

# **Displaying Meeting Attendance**

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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.

Governor	Basic Details							
Title	Miss	Surname	Stewart			Given Name	Kechani	
Gender	Female	<ul> <li>Disqualified Dat</li> </ul>	e dd/mm/j	(YYY	Ħ	×	Disqualif	ied
Email							Quio	k Report
Attendan								
Date	Governing Bo	dy 🕅 Meeting	Type 🟹 Att	endance 🏹	Non Attenda	nce Reason 🕅	7	
20/03/20	013 Middenham u	peer ticheel Notice o	of Meeting Yes	5				
05/04/20	013 Johny Middle	Enhand AGM	Yes	5				

## **Displaying Roles**

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

Governing Body Search > Governing Body Details > Governor Details									
Govern	Governor Details Has Rachard Stowart								
Governor Ba	asic Deta	ils							
Title	Miss		Surname	Circuit de la companya de la compa			Given Name	Rachael	
Gender	Female	•	Disqualified Date	e dd/mm/yy	yy 🔳		×	Disqualif	ied
Email								Quic	k Report
Appointme	nt Detail:	s Trainir	ig Manager Courses	Training Other	rs Disclosure D	)etails	Attendance R	oles Memo	Actions
Roles									
Role/Post	A	Establish	iment 🕅	Start date $\overline{\mathbb{V}}$	End date $\overline{\mathbb{V}}$				
Hash Post	1	each ag		01/01/2010					
Nich Post	3	<b>Disastin</b>	n Benhalogy Team	01/01/2012					
Co-opted E	Business	Abber R	idelle School	25/03/2013	24/03/2017				



**Reference Guide** 

Governors

**Managing Governor Details** 

### **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.

verning Body Search > Governing Bo	dy Details 🕽 Governor Details			
overnor Details Miss na	dael theat			🚔 🗧 ·
vernor Basic Details				
le Miss Surname		Given Name		
	fied Date dd/mm/yyyy		Disqualified	
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# **Managing Meeting Actions**

- 1. On the **Governor Details** page, select the **Actions** tab.
- 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.

	Body Search > G	overning Body Details >			
Governor I	Basic Details				
Title	Miss	Surname	Element	Given Name	Kachad
Gender	Female	Disqualified Date	dd/mm/yyyy	×	Disqualified
Email					Quick Report
Appointm	ent Details Train	ing Manager Courses	Training Others Disclosure Deta	ils Attendance Rol	es Memo Actions
List of Me	eting Actions				
/ Ed	lit 🛛 💥 Delet	te			
Date Due	T Status T	Description T Meetin	g Title 🟹 Body 🟹 Assigned	To V Action To Tak	- T

		23
Meeting Ac	tion Edit	
Action Details		
Governing Body	abev Hiddle School	
Meeting Title	IGM	
Date Due *	15/04/2013  R Status Completed	
Description *	Meeting action	
Action To Take		٦
Assigned to *	Position Chair	
	Governor	
Action Taken		
Date Completed	15/04/2018	
Action Set By		
Action Set by	0110/04/2013	
	OK	
	Citode Citode	

### Related Reference Guides:

- Primary Navigation
- Display Governor Details

# CAPITA

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