



NOTE : Establishments can be managed in both v4 Online and v4 Client. Accessing Governors via v4 Online offers the best performance to users.

To access Governors establishments in v4 Online, select the **Establishments** tab.

Adding an Establishment

In the **Establishment Search** panel, you can add a new establishment or search for an existing establishment.

To add a new establishment:

1. Click the **New** button to display the **Establishment** page.
2. Enter an **Establishment Code**.
3. Enter an **Establishment Name**.
4. Click the **Save** button.
5. Select the **Composition** tab.
6. Click the **Add** button to display the **Composition Details** dialog.
7. Select a **Type** for the type of governor (*Lookup Table ID: 0118*).
8. Enter a **Number** for this type of governor.
9. If required, enter a **Quorum** for this governor type.
10. Click the **Save** button.

Updating an Establishment Name

1. In the **Establishment Search** panel, enter search criteria and click the **Search** button.
2. Select an establishment in the list and click the **View Details** button to display the **Establishment** page.
3. Select the **Details** tab.
4. Enter an **Establishment Name**.
5. Click the **Save** button.

Establishment Code	Establishment Name	Voting Governors	Other Governors
BTA		4	
LEAG1		18	1
LEAG2		14	1
LA1			
LT1		9	
NTEST		9	1
TEST		12	5
plm1		5	
LEA		9	5



Updating Establishment Composition

1. In the **Establishment Search** panel, enter search criteria and click the **Search** button.
2. Select an establishment in the list and click the **View Details** button to display the **Establishment** page.
3. Select the **Composition** tab.

Description	Voting	Number	Quorum
Co-opted Business	Yes	2	2
Community	Yes	2	2
Parent Governor	Yes	3	3

4. If required, amend the details on the **Composition** tab as follows:
 - a. Select a governor type and click the **Edit** button to display the **Composition Details**.
 - b. Select a new **Type** from the drop-down.
 - c. Enter a new **Number** for this type of governor.
 - d. Enter a **Quorum** for this type of governor.
 - e. Click the **Save** button.
5. If required, add a new governor type for this establishment as follows:
 - a. Select a governor type and click the **Edit** button to display the **Composition Details**.
 - b. Select a new **Type** from the drop-down.
 - c. Enter a new **Number** for this type of governor.
 - d. Enter a **Quorum** for this type of governor.
 - e. Click the **Save** button.
6. If required, remove a record from the **Composition** tab as follows:
 - a. Highlight a record.
 - b. Click the **Delete** button to display a confirmation message.
 - c. Click the **Yes** button.

Composition Details

Type * Parent Governor

Number * 3

Quorum 3

Save Close



Related Reference Guides:

- **Primary Navigation**
- **Amend a Governing Body**
- **Create an Appointment**
- **Add a Committee**
- **Manage Meetings**
- **Edit Governor Details**