



Governors

Recording Correspondence

Searching for Communications

1. On the **Governing Body Search** page, search for the required governing body.
2. Double-click the required governing body to display the **Governing Body** page.
3. Select **Communication Log** from the **Links** drop-down to display the **Communications for Governing Body** page.
4. Populate the filters on the **Communication Log Filters** panel, if required.
5. Click the **Search** button.
The results of the search are displayed on the **List of Communications** panel.

Log Date	Log Time	Summary	From	Role	Establishment	To	Role	Establishment	Type	Direction	Attachments
10/07/2013	09:03	Phoned to confirm	Test Ham		A Test			A Test	Telephone	Outbound	No
10/07/2013	08:52	Email received regardin...	Test Ham		A Test			A Test	Email	Inbound	No

Recording a New Communication

1. On the **List of Communications** panel, select a **Type**, **Direction** and **Service Team** from the drop-downs.
2. Click the **New** button to display the **Communication Log Details** page.
3. Enter details of the communication on the **Summary** tab. Fields on this tab are dependant on the **Communication Type**.
4. Select the **Response Required** check box, if required, and enter a **Response Due Date**.
5. Select a **Referred To**, if required.
6. Select the **Subjects/From/To** tab to record the person who initiated the communication and to whom the communication was sent.
7. On the **From** panel, click the **Add** button to display the **Person Search**, or if the communication is anonymous, select the **Anonymous** check box.
8. On the **To** panel, click the **Add** button to display the **Person Search**.
9. If required, on the **CC - Recipients** panel, click the **Add** button, if required, to display the **Person Search**.



Recording an Email

1. On the **Email Detail** tab, enter the **Subject** and **Body** of the email.
2. Click the **Save** button at the top of the page.

Summary	Subjects/From/To	Email Detail	Memo
Email Detail			
Subject			
Governors Meeting			
Body			
Dear All,			

Recording a Telephone Call or SMS

1. On the **Summary** tab, enter the **Service Team** involved and the **Date** and **Time**, if required. Enter the **Duration** of the telephone call, if required.
2. Enter a **Summary** of the telephone call or SMS message.
3. Click the **Save** button at the top of the page.

Summary	Subjects/From/To	Memo	
Summary			
Communication Type	Telephone	Communication Direction	Outbound
Service Team			
Log Date	09/07/2013	Log Time	11:17
Duration			
Summary *			

Recording a Letter or Fax

1. On the **Letter Details** tab, enter the **Received / Sent Date**, **Letter Date**, **Print Date** and **Letter Reference** of the letter or fax, if required.
2. Click the **Save** button at the top of the page.

Summary	Subjects/From/To	Letter Details	Memo
Letter Details			
Receive/Sent Date	dd/mm/yyyy	Letter Date	dd/mm/yyyy
Print Date	dd/mm/yyyy	Letter Reference	

Recording a Memo

1. Select the **Memo** tab to record a memo related to any type of communication.
2. Click the **Save** button at the top of the page.

Summary	Subjects/From/To	Memo
Memo		
[Rich Text Editor with Font, Paragraph, Insert, Tools tabs]		



Related Reference Guides:

- **Governors Primary Navigation**
- **Governors Person Search**
- **Governors Correspondence Follow-Up**