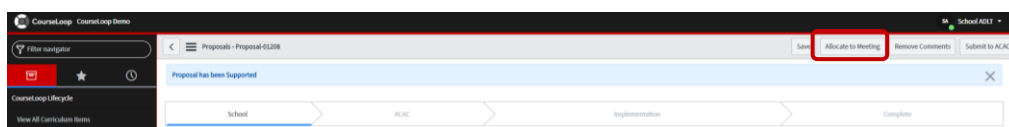


How do I allocate a proposal to a meeting?

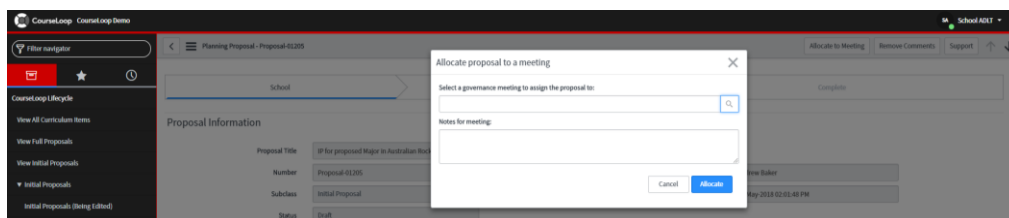
Step 1

Once proposals have been submitted to a governing body, they can be allocated to a governing body meeting for consideration. Open the proposal detail view. Click the “Allocate to Meeting” button in the upper right corner of the screen. The system will display the box below.



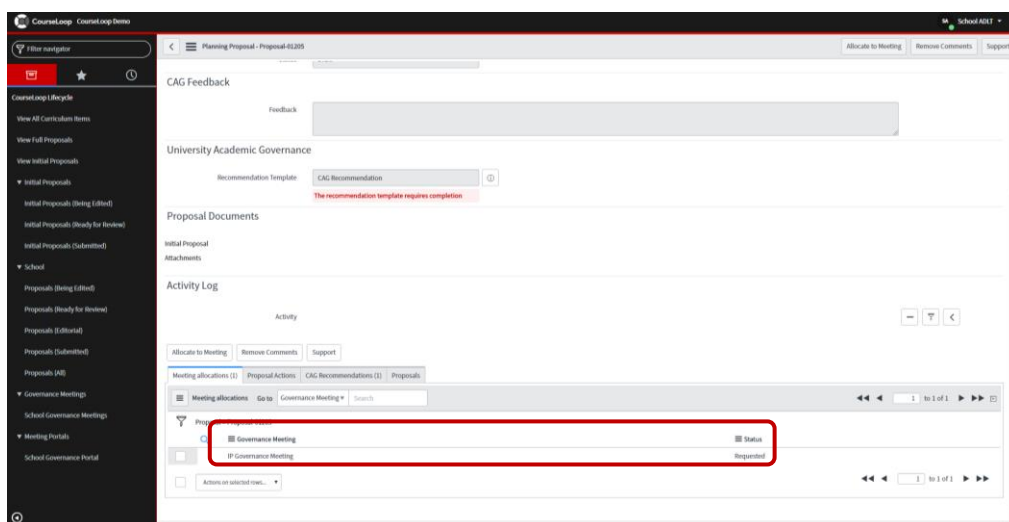
Step 2

Click the magnifying glass icon to select the meeting to allocate the proposal to, adding any relevant notes. Once complete, click the “Allocate” button.



Step 3

Once a proposal has been allocated to a meeting, a new entry will appear in the Meeting Allocations tab in the proposal detail view.



Step 4

Allocating a proposal to a meeting acts as a request to have the proposal considered at that meeting. At this stage, the proposal will have a status of ‘Requested’ assigned to it for the meeting. The meeting administrator can set the status to ‘Allocated’ once confirmed the proposal is on the

agenda. Open the meeting detail view. Select the relevant “Meeting Planning” tab. Double-click to the right of the existing status to enter edit mode. Select the desired status from the dropdown menu and click the green check icon.

