

Lesson – Create an Action

- Go to the **Go To...** menu in the top left-hand corner of the browser's window
- Select **Actions** on the menu
- Click the **New Action** button on the menu

Create an Action

- Enter a **Code** for the Action: TESTAC_[your initials]1.a
- Enter the **Title** of the Action: Training needs analysis
- Click on the calendar button (📅) to select a **Due Date**
- Select the date the Action is due to be completed: 2 months' time
- Click the **Save & Close** button

Updating Actions using the progress bar

- Click on the **Update** button in the top panel
- Update the progress of the Action: 15%
- Enter the note: First stage completed
- Click the **Save & Close** button
- Go to the Action's **Notes** panel; depending on how your site has been configured, the Notes panel will either be on the first tab or on the More... tab
- Click on the **Notes** heading
 - Select **Add a new Note**
 - Enter the note: Everything underway.
 - Click the **Save & Close** button

Completing an Action

- Click on the **Update** button in the top panel.
 - Click the **Complete** button

The progress changes to 100%.

- Click the calendar button (📅) to select the **Completed Date**
- Enter the note: Action completed
- Click the **Save & Close** button