Icon

Description automatically generated **Adding an Action in Sisra Observe**

Actions can be used to assign tasks, set reminders or provide next steps to staff members, e.g. to set up a meeting with a department head to discuss CPD. Some admins choose not to switch the Actions feature on, so we would recommend speaking to your organisation’s Observe admin if you’re unsure about this.

Currently the Excel Add**-**In is only compatible with a PC that is running Windows.

Graphical user interface, application

Description automatically generatedTo add an action to a record, click ‘**Records’** > locate and **click on the name of the record** > ‘**View’**.

**1.** Navigate to the appropriate focus area to add the action to.

**2.** On the blue evidence bar underneath the focus area, click ‘**Add**’.

*Please note, the evidence bar functionality is made available by your admin. If you can’t see the blue bar, speak to your organisation’s Observe admin.*

Graphical user interface, application

Description automatically generated

**3.** Click ‘**Add Action**’.

*Appraiser is listed as ‘Owner’.*

*Appraisee is listed as ‘Staff’.*

Graphical user interface, text

Description automatically generated**4.** Enter a title for the action.

**5.** Click in the Deadline Datetextbox to set the date the action needs to be completed by.

**6.** Provide more details for the action in the Action Descriptiontextbox, if necessary.

**7.** Click in the Assigned Usersbox to select the users you want to assign the action to. You can add up to 5 users to the same action!

*If your admin has enabled email alerts, once you save your action, any assigned users for this will be notified by email.*

**8.** Next set the Privacy setting for the action.

* **Private** – only people you have assigned the action to will be able to see it.
* **Standard** – everyone with access to the record (observers, observees, admins) will be able to view the action.

**9.** Once you’re happy, click ‘**Save**’ to save and assign the action. You can view all actions you have access to by navigating to Actions on the main navigation bar. From here you can search for, view and update any action you have access to.

**10.** You can also add actions without linking them to a record. To do this, click ‘**Actions**’ at the top of the page. This will show you your list of Actions, where you can then click ‘**Add Action**’.

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Graphical user interface, application

Description automatically generated

Graphical user interface, text, application, chat or text message

Description automatically generated**11.** Then, repeat steps 4-7 shown on page 2 to complete the action. *The Privacy settings are automatically set to ‘Private’ if an action is not linked to a record.*

Then click ‘**Add & Close**’or ‘**Add & View**’to complete the sction.