

Profile Notes



This feature is available to Site Managers, Campus Admins, Campus Managers, and User Group Managers depending on system configuration.

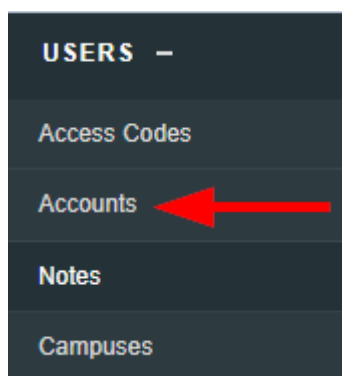
Private notes and associated attachments can be added to a user's profile. These notes can be viewed and edited by other admin accounts. Notes are accessed directly from a user's profile where you can create or manage notes for the selected account or from a manage page that shows all of the notes in the system. Up to 10 types of notes can be configured for your system.

Navigate to Notes

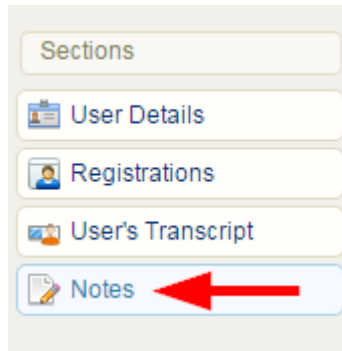
Select a navigation method below.

One Individual's Notes

1. Log in with a Site Manager, Campus Admin, or Campus Manager account.
2. Select **Accounts** under Users in the main navigation menu.



3. Select an account name to open the user's profile.
4. Select Notes from the Sections menu. If you cannot see the menu, show the [Tool Panel](#).



5. Optionally use [Filter and Save Search](#) or the username column to find specific notes.

6. Optionally [Export](#) the notes.

7. Expand a note to read the full note text (the list has a 100-character limit).

Kevin Adams: Notes

You are viewing: Users > Accounts > Kevin Adams: Notes

Records: 2

Export as: [HTML](#) [XML](#) [Excel](#)

List

Filter

Searches

ID	Type	Note	Attachment	Username	Email	Created	Edited	
1	General	Kevin needs to take WHMIS onsite for his role as Health & Safety Officer for his department.	AODA-accessibility_standards.pdf	kadams@sencia.ca		8/19/2015 11:52 AM Sencia Administrator	8/22/2018 10:44 AM Jason Bruce	<div>Edit</div>
2	General	Kevin purchased the TDG course directly from his supervisor instead of via eCommerce. Receipt is attached.	receipt.jpg	kadams@sencia.ca		8/19/2015 11:53 AM Sencia Administrator	10/19/2015 10:58 AM Sencia Administrator	<div>Edit</div>

Details

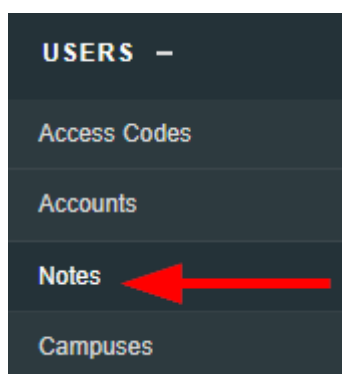
Note for: Kevin Adams

Kevin purchased the TDG course directly from his supervisor instead of via eCommerce. Receipt is attached.

All Notes (Site Managers Only)

1. Log in with a Site Manager account.

2. Select **Notes** under Users in the main navigation menu.



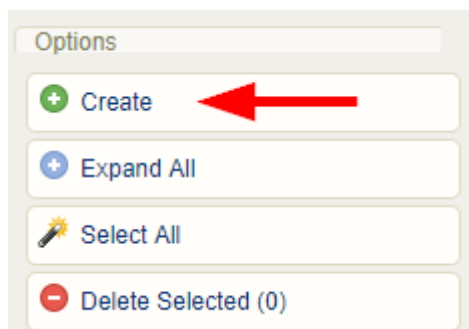
3. Optionally use [Filter and Save Search](#) or the username column to find specific notes.
4. Optionally [Export](#) the notes.
5. Expand a note to read the full note text (the list has a 100-character limit).

Create a Note



You must create new notes from a user's profile.

1. Navigate to the [Individual's Notes](#) .
2. Select **Create** from the options menu. If you cannot see the menu, show the [Tool Panel](#) .



3. Complete the form.
 - a. Select the note type.
 - b. Enter note text.
4. Optionally attach a file. Each note may have one attachment. Select **Browse** under the File Attachment section to select the file you want to attach to the note.

File Attachment



Please Note: Existing attachments will be overwritten.

Attached File:

No Attachment Selected

Browse

[Supported File Types](#)

5. **Create.**

Delete Notes or Attachments



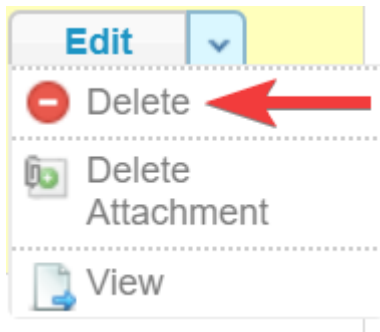
Deleted notes are permanently removed from the system. Deleting a note will also delete any attached file.

Delete Notes

Select a deletion method below.

Delete One at a Time

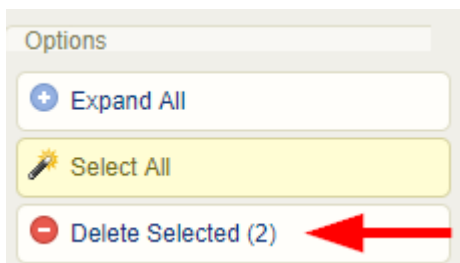
1. [Navigate to Notes](#) using either method.
2. Select the drop-down arrow on the note's **Edit** [Split Button](#).
3. Select **Delete**.



4. Answer **Yes** to confirm the deletion.

Delete Multiple Notes

1. [Navigate to Notes](#) using either method.
2. [Select](#) notes.
3. Select **Delete Selected** from the Options menu. If you cannot see the menu, show the [Tool Panel](#).



4. Answer **Yes** to confirm the deletion.



Deleted attachments are permanently removed from the system.

Delete Note Attachment

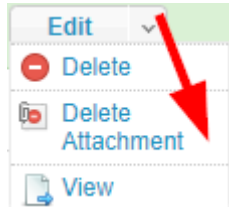
A file attachment associated to a note can be removed without deleting the note.

1. [Navigate to Notes](#) using either method.

2. Select the drop-down arrow on the note's **Edit** [Split Button](#)

.

3. Select **Delete Attachment**.



4. Answer **Yes** to confirm the deletion.

Edit a Note or Attachment

Edit Note Text

1. [Navigate to Notes](#) using either method.
2. Select the **Edit** button next to the applicable note.
3. Make the changes to the note text.
4. **Save**.

Edit a Note Attachment

You can upload a new file to replace a note attachment or overwrite the existing attachment. To overwrite the file, ensure that the new file name is exactly the same as the current file attachment.

1. [Navigate to Notes](#) using either method.
2. Select the **Edit** button next to the applicable note.
3. Select **Browse** under the File Attachment section to select the file you want to attach to the note.

File Attachment



Please Note: Existing attachments will be overwritten.

Attached File:

No Attachment Selected

Browse

Supported File Types

4. **Save.**



Each note may only have one attachment.