


# Using Notes Attachments

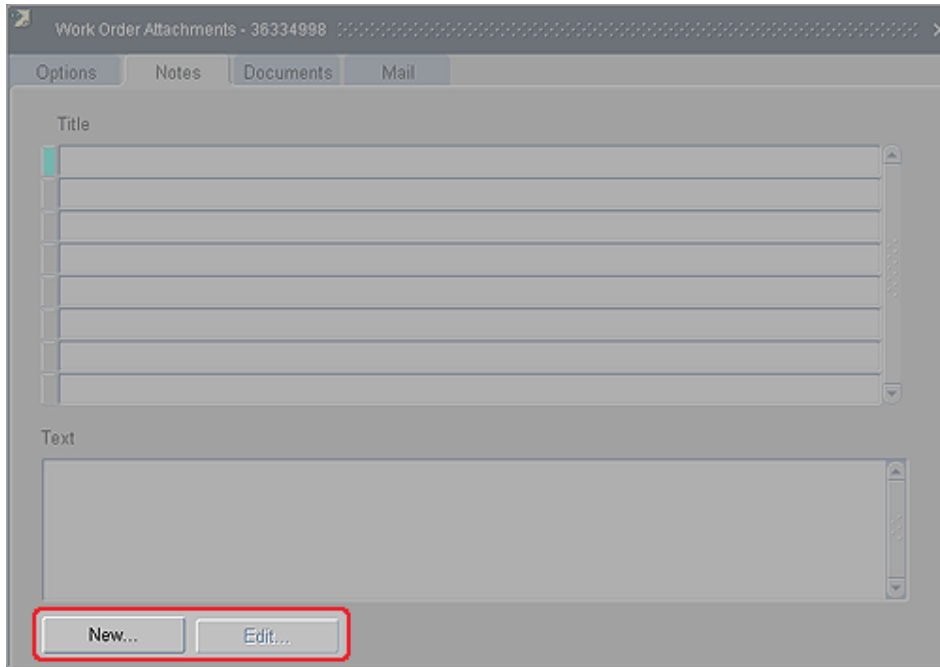
## PROCEDURE

### 1. Creating a Note Attachment

a) Open the SR, CP, Equipment, etc. record to which you will attach the Note.

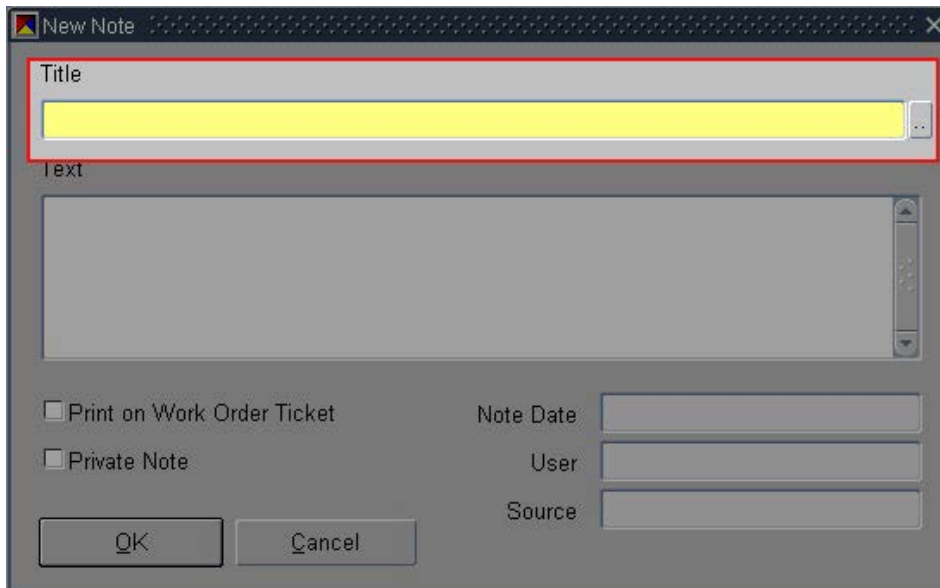
b) **Attachments** – Click the Attachment button in the upper right-hand corner of the form ; click on the Notes tab.

#### Attachments Form – Notes Tab



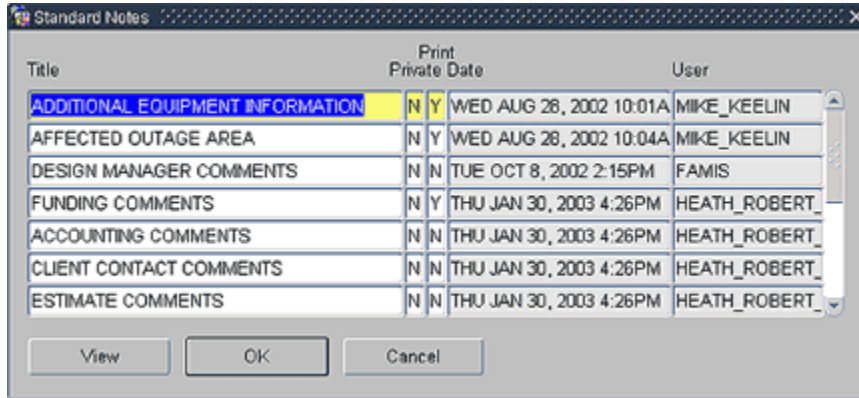
c) **New** – Click the New Button to open the New Note Form

#### New Note Form



d) **Title** – (required) Click LOV button to open the Standard Notes form:

## Standard Notes Form



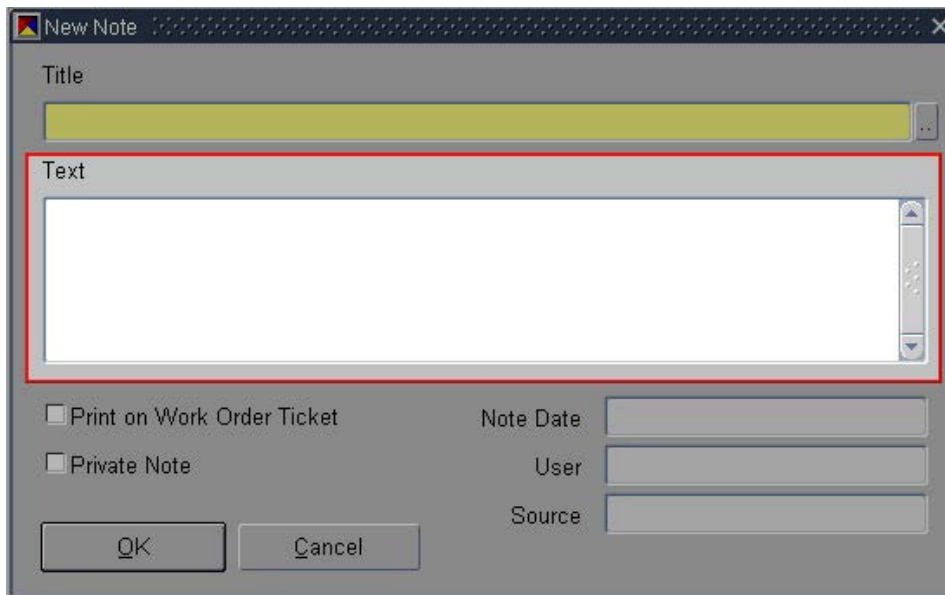
A dialog box titled "Standard Notes" containing a table of note templates. The table has columns for Title, Print Private, Date, and User. The first row, "ADDITIONAL EQUIPMENT INFORMATION", is highlighted in yellow.

Title	Print Private	Date	User
ADDITIONAL EQUIPMENT INFORMATION	N Y	WED AUG 28, 2002 10:01A	MIKE_KEELIN
AFFECTED OUTAGE AREA	N Y	WED AUG 28, 2002 10:04A	MIKE_KEELIN
DESIGN MANAGER COMMENTS	N N	TUE OCT 8, 2002 2:15PM	FAMIS
FUNDING COMMENTS	N Y	THU JAN 30, 2003 4:26PM	HEATH_ROBERT_
ACCOUNTING COMMENTS	N N	THU JAN 30, 2003 4:26PM	HEATH_ROBERT_
CLIENT CONTACT COMMENTS	N N	THU JAN 30, 2003 4:26PM	HEATH_ROBERT_
ESTIMATE COMMENTS	N N	THU JAN 30, 2003 4:26PM	HEATH_ROBERT_

Buttons: View, OK, Cancel

- e) Select the appropriate Note template file.
- f) Click OK to close the Standard Notes form and return to the New Note form.

## New Note Form – Text Section



A dialog box titled "New Note" with a "Title" field and a large "Text" area. Below the text area are checkboxes for "Print on Work Order Ticket" and "Private Note", and input fields for "Note Date", "User", and "Source".

Buttons: OK, Cancel

- g) **Text** – (required) Enter text as determined by business rules for the record type and note type.

## New Note Form – Details Section

The screenshot shows a 'New Note' dialog box. It has a title field, a text area, and a details section. The details section is highlighted with a red box and contains the following fields:

- Print on Work Order Ticket
- Private Note
- Note Date: [Text Input Field]
- User: [Text Input Field]
- Source: [Text Input Field]
- OK button
- Cancel button

- h) **Print on Work Order Ticket** – Checking this box will cause this note to print on all work orders related to the record (CP, Equipment, Building, etc.). Your business rules will establish whether or not this box should be checked.
- i) **Private Note** – *(not used)*
- j) **Note Date** – *(read only)* When the record is saved, this field shows when the note was created.
- k) **User** – *(read only)* When the record is saved, this field displays the name of the person who created the note.
- l) **Source** – *(read only)* When the record is saved, this field displays the name of the form in which this note is attached.
- m) Click OK to save the record and close the form.
- n) Repeat above steps as needed for additional Notes.

## 2. Editing a Note Attachment

- a) Open an existing Note by clicking on the Attachments button and opening the Notes tab:

# Using Notes Attachments

## Attachments Form – Notes Tab

Title	Source
FUNDING COMMENTS	WO

Text  
FUNDED 1K FOR CP

New... View...

b) Click the View button to open the Edit Note form:

## Edit Note Form

Title  
FUNDING COMMENTS

Text  
FUNDED 1K FOR CP

Print on Work Order Ticket      Note Date: TUE FEB 7, 2012 4:01PM  
 Private Note      User: DUSSAULT\_STEPHANIE\_D  
Source: WO

OK Cancel

c) Modify Note as appropriate; refer to previous section for field-specific information.

d) Click OK to save the record and close the form.