PROCEDURE
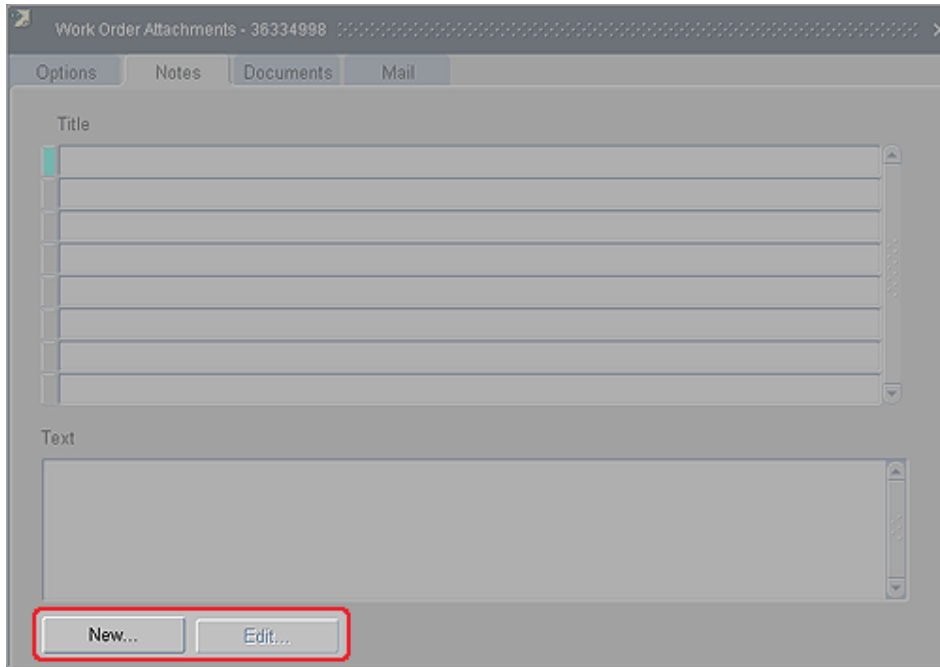
1. **Creating a Note Attachment**

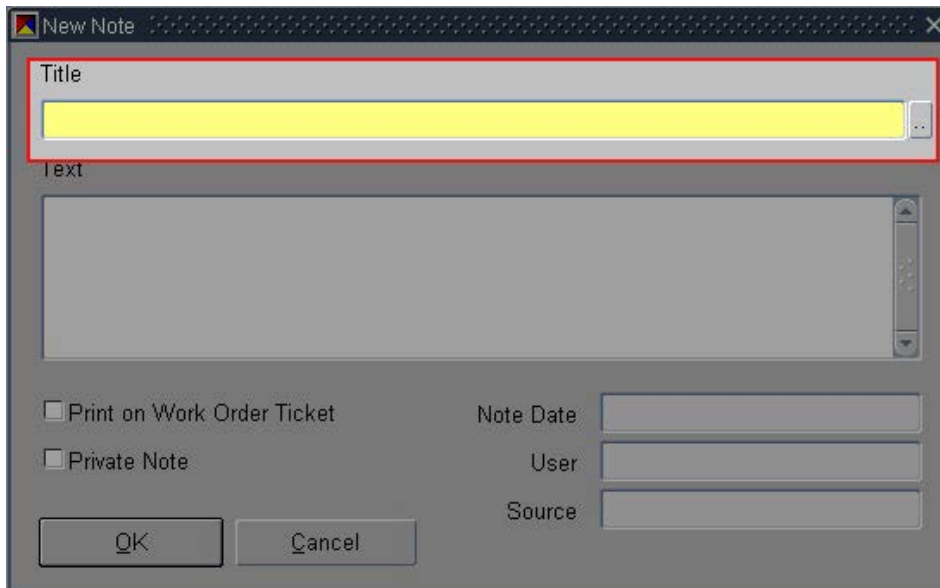   a) Open the SR, CP, Equipment, etc. record to which you will attach the Note.

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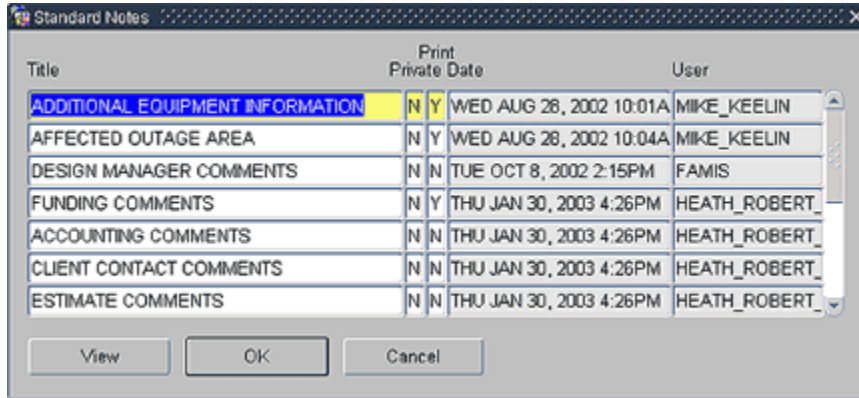
Attachments Form – Notes Tab

   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:
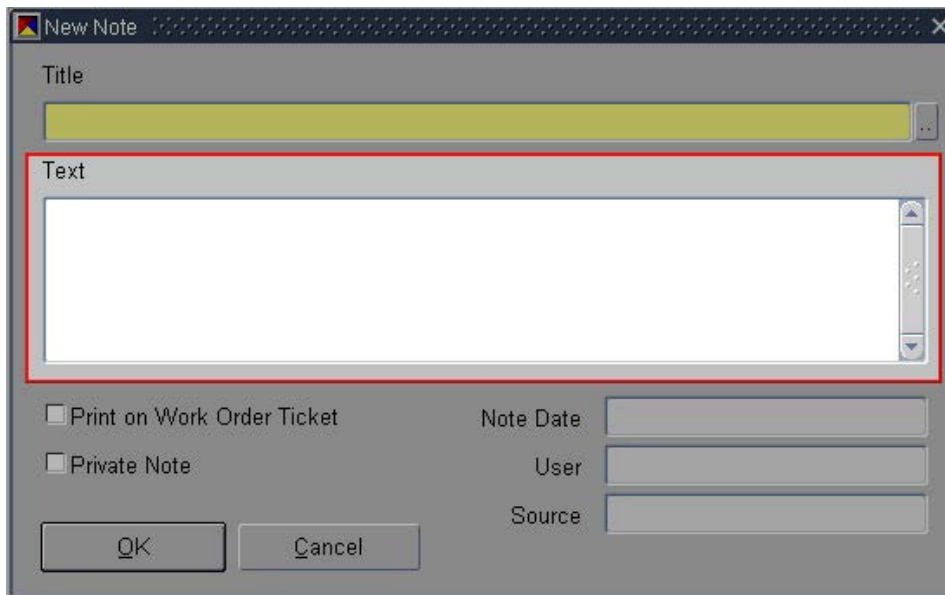
Standard Notes Form

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

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

New Note Form – Details Section

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:

Attachments Form – Notes Tab

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

Edit Note Form

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

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