crimson

Notes

The **Notes** function in Crimson allows users to keep track of notes within a People record. When adding a note, the user can include a subject, date, note, and attachment.

Notes cannot be searched for using **People search. To view a note, open the note within the **People** record or generate the **Full Profile** call sheet. There are also **Data Maintenance Reports** that allow you to pull notes in mass by subject, state, date, etc. (#1002, #1003, and #1005).

Creating and Editing Notes within People Records

1. To create or edit a note, first open the **People** record the note is to be assigned to. For information on how to find and open a **People** record, please see the Crimson: People Search solution on the HelpDesk.

2. Once within a **People** record, you will see several panels. Click on the **Notes** panel to pull up a list of notes associated with this record and options to create or edit notes.

3. To edit a note in the list, click the button. The **Note** window containing that note's information (subject, date, note, and attachment) will appear. After you have finished editing, click **Save** or **Cancel**.

4. To delete a note in the list, click the button.

5. To create a new note, click the **Add Note** button. In the new window, you can enter the subject, date, note, and attachment. Then click **Save**.

Add Note - Mr. Joseph M. Banks, Sr. (PID: 74178535)

Subject

Date
11/14/2022

Ask Memo

Note

Move

Move Life Cycle Stage

Save   Cancel