Notes

About Notes

Every user can write a note about a person or document and save it as part of that resource's Properties. A note consists of a simple title and the associated text; with additional information recorded in Training notes. Notes can be shared with other users and the text of a note can be formatted using the Note window's toolbar

Sharing of notes

There are four levels of sharing of notes:

- **Public notes** can be read by any user, and edited by Super Users in the resource's Primary Group .
- **Entity notes** can be read by all users with a role in the chosen group.
- **Administrative notes** can be read only by users with the appropriate permissions in the chosen group; see Group role permissions.
- **Private notes** can only be read by the person who created the note.

As a default, newly created notes are marked as Administrative. Notes can always be read, edited, and deleted by the person who created them.

Note types

Notes for people or documents (including reviews) are categorised into types. For people, the possible types are:

- General - the default note format.
- Training - for recording training attendance.
- Interest - for recording a person's interests
- Tag - for recording keyword-like information.

For documents, the options are General and Tag.
Training notes for people include set of additional fields (displayed on a separate tab) for recording details about the training, e.g. when it took place. CRG Super Users can choose (using Edit Notifications) to be notified when a training note is created for one of their authors.

See also Notes Management Tool