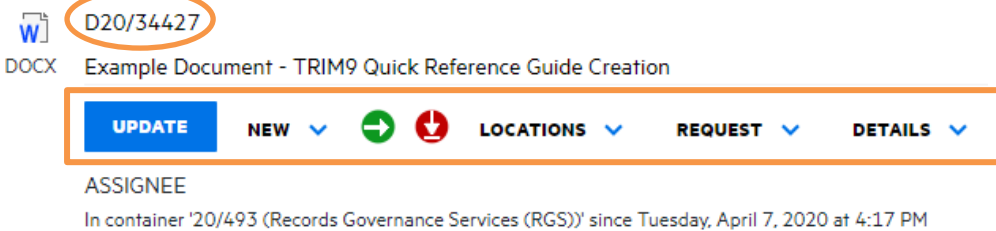## Adding Notes to a Record

The Notes function in TRIM9 can be used to provide additional information about the content/context of a record. Adding notes to a record is most suitable for recording information about a record which may be needed by yourself or a colleague in the future, where the information doesn't require the creation of a new record.

To add notes to a record in the TRIM9 Web Client:

1. Locate the record which you want to add a note to.

2. Ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:

D20/34427

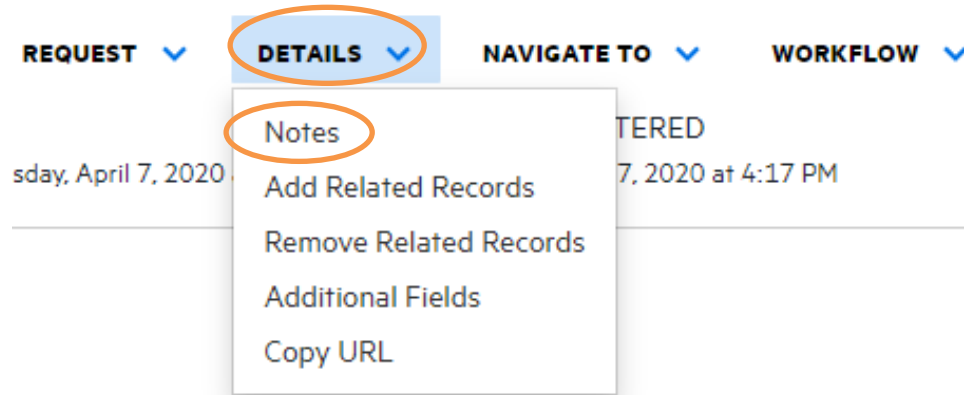DOCX   Example Document - TRIM9 Quick Reference Guide Creation

UPDATE   NEW ∨   →   ↓   **LOCATIONS** ∨   **REQUEST** ∨   **DETAILS** ∨

ASSIGNEE

In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:17 PM

3. Click on the **DETAILS** drop-down and select **Notes**:

REQUEST ∨   **DETAILS** ∨   **NAVIGATE TO** ∨   **WORKFLOW** ∨

Notes   TERED

Add Related Records   7, 2020 at 4:17 PM

sday, April 7, 2020

Remove Related Records

Additional Fields

Copy URL

4. The **'NOTES'** window will display:

NOTES

Notes

Add to Notes

● AT THE START
○ AT THE END
☑ Insert User Stamp

ADD TO NOTES   **CANCEL**

5. In the 'Add to Notes' field type in your note. Next, ensure the 'Insert User Stamp' field is ticked, then select **ADD TO NOTES**:

NOTES

Notes

Add to Notes

This is a test note.

● AT THE START
○ AT THE END
☑ Insert User Stamp

ADD TO NOTES   **CANCEL**

6. To view your new note, and any other notes which may exist on a particular record; as in step 2 and step 3, display the options such as UPDATE, NEW, LOCATIONS etc. for the particular record, click on the **DETAILS** drop-down and select **Notes**. Any existing notes will display in the top part of the 'NOTES' window:

NOTES

Notes

"Thursday, April 9, 2020 at 10:14:23 AM (GMT+10:00)   Rheinberger, Bryce:"
This is a test note.

Add to Notes

● AT THE START
○ AT THE END
☑ Insert User Stamp

ADD TO NOTES   **CANCEL**

6. Click **CANCEL** if you don't need to add a note: