

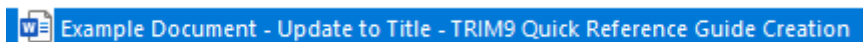
Adding Notes to a Record

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.

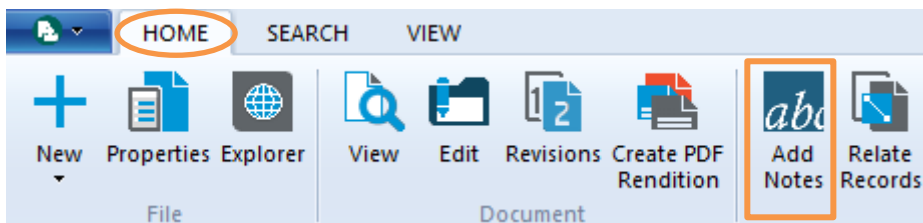
To add notes to a record in TRIM9:

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

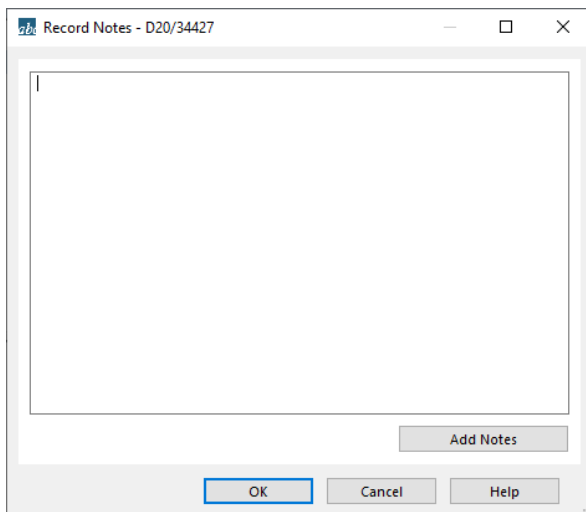
2. Click on the record once to highlight it blue:



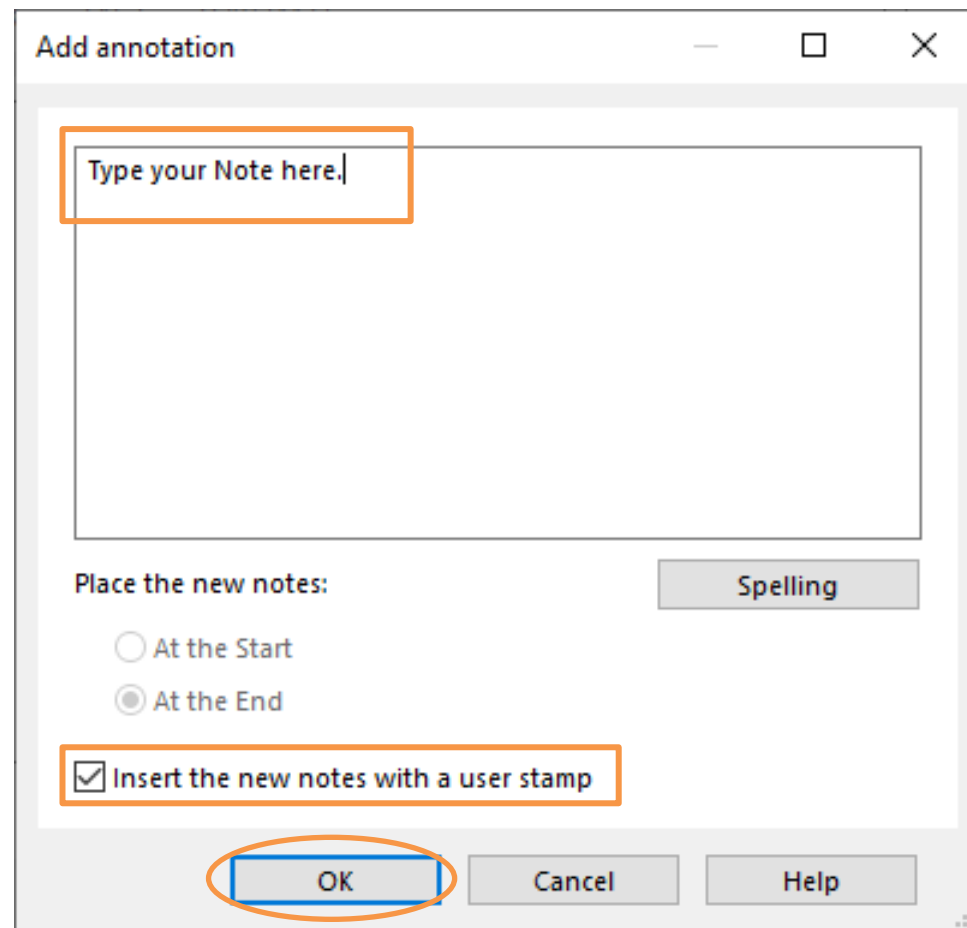
3. Select the 'HOME' tab, then select the **Add Notes** button:



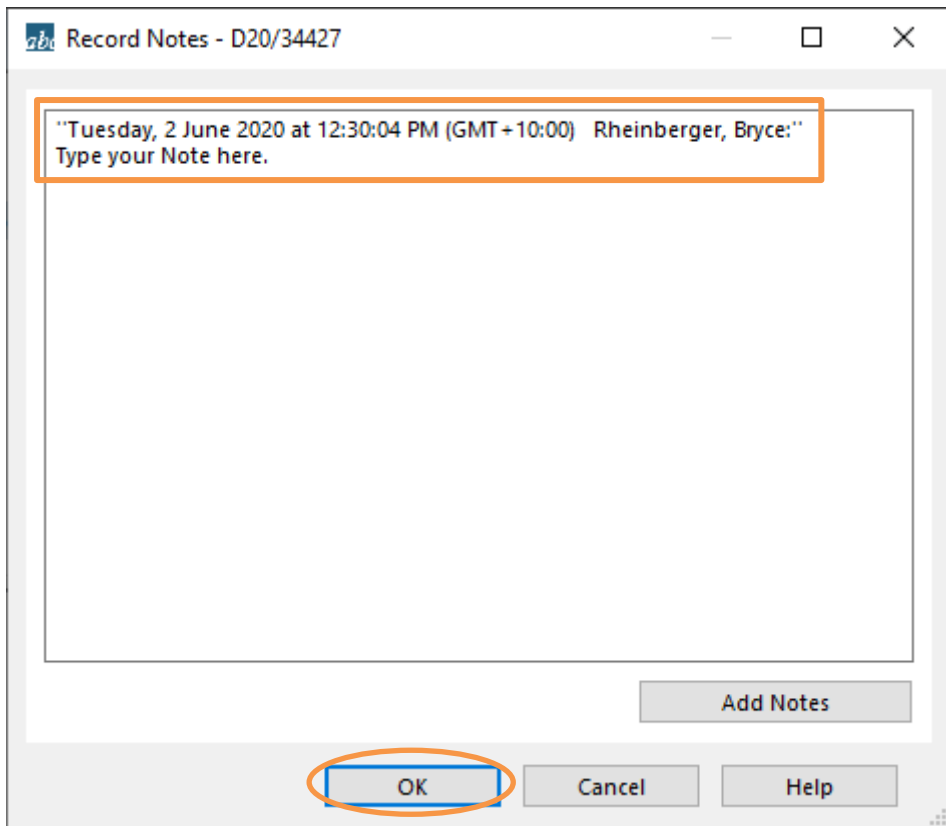
4. The 'Record Notes' window will appear. Select **Add Notes**:



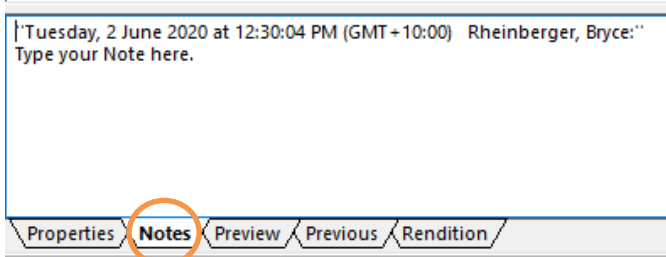
5. The 'Add annotation' window will appear. Type your note in the area as shown below and ensure the 'Insert the new notes with a user stamp' check box is ticked. Then select **OK**:



- The **'Record Notes'** window will appear and display your new note with the user stamp above it. Select **OK** to finish saving your new note:

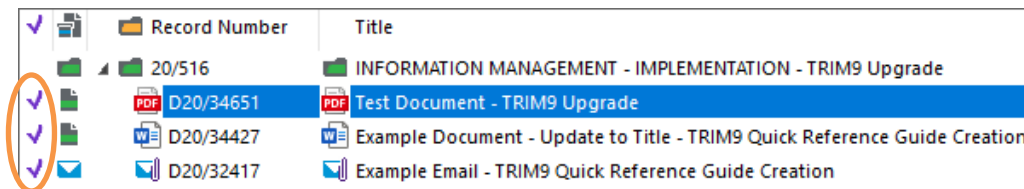


- To view your new note, and any other notes which may exist on a particular record, click on the **Notes** tab at the bottom left of the TRIM9 screen:

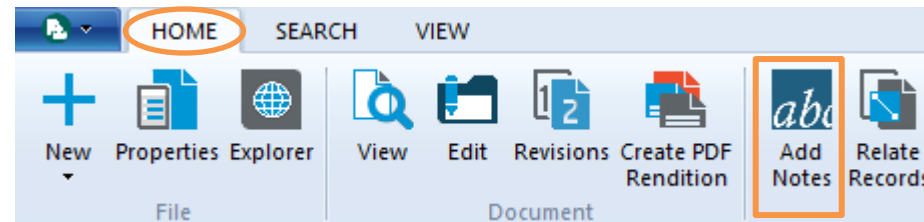


Hint: Should you need to add the same note to multiple records, it is possible to add a note to two or more records at once:

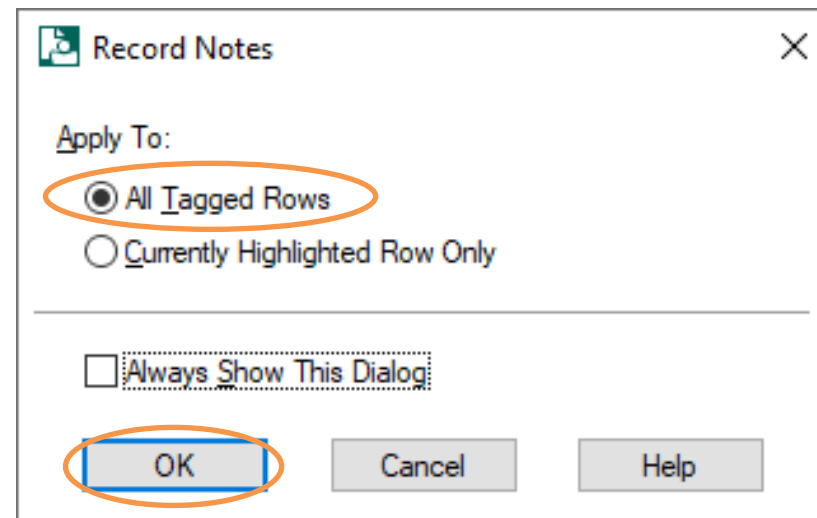
- Tag the records you want to add a note to by clicking to the left of them:



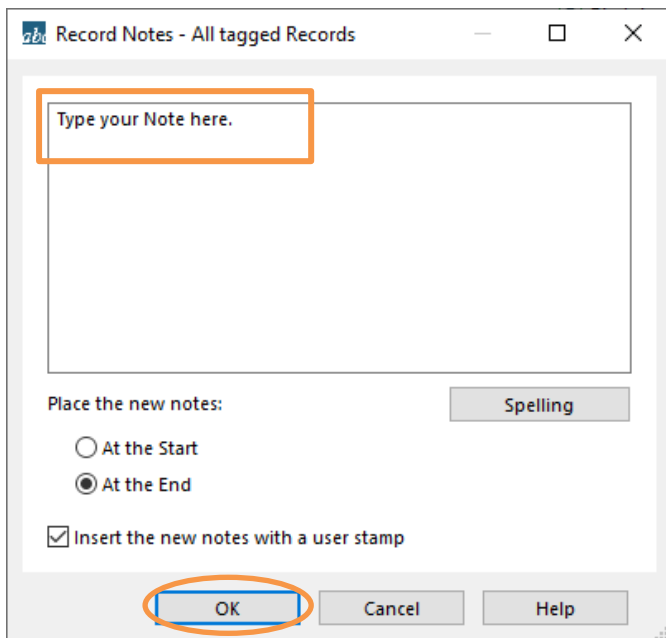
- Select the **'HOME'** tab, then select the **Add Notes** button:



- Ensure 'All Tagged Rows' is selected, then click **OK**:



4. Type the note which you want to add to all selected records, then click **OK**:



Record Notes - All tagged Records

Type your Note here.

Place the new notes:

☐ At the Start

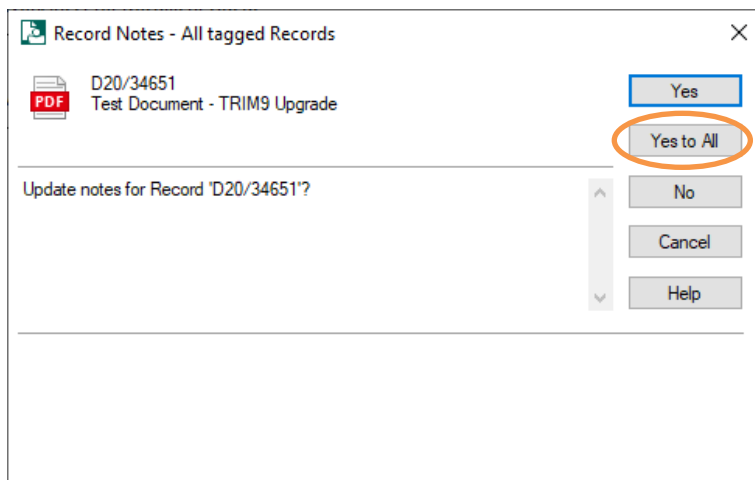
☒ At the End

☒ Insert the new notes with a user stamp

Spelling

OK Cancel Help

5. Select **Yes to All**, and the note will then be added to all selected records:



Record Notes - All tagged Records

D20/34651
Test Document - TRIM9 Upgrade

Update notes for Record 'D20/34651'?

Yes
Yes to All
No
Cancel
Help