

The 'My Notes' feature enables you to record notes that only you can view. The notes you create can be linked to specific plans – for example, if you want to remember to pass on some positive feedback about a team member provided to you by a colleague. You can also create notes to remind you of items for discussion with your own supervisor, or create a generic note about a particular issue you'd like to discuss with each member of your team.

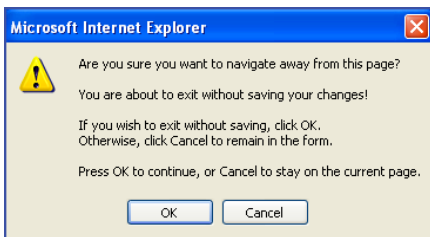
- All notes are created, edited and deleted via the 'My Notes' icon.
- If a team member is not attached to the note, the note will only be visible, editable and able to be deleted via 'My Notes'.
- If a note is created in reference to a specific team member, the note will be viewable within the 'Notes' area of the team member's plan as well as via the 'My Notes' icon.

### Creating a note

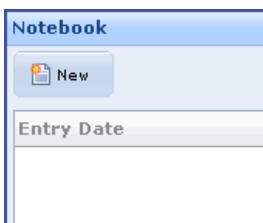
**Step 1:** Click on the 'My Notes' icon at the top right-hand side of the screen.



**Step 2:** Click on 'ok' to continue if you receive the following prompt.

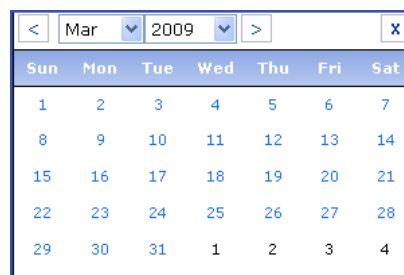
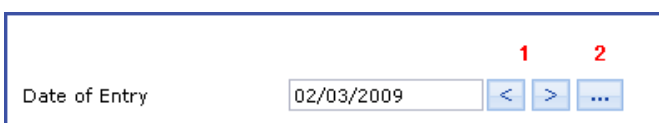


**Step 3:** Click on the 'New' button.



**Step 4:** Enter the date of the note. You can either type directly into the field, or choose from the available buttons:

- 1 will move the date backwards or forwards by 1 day
- 2 will populate a calendar to choose from



**Note Details**

Fields marked with \* are required.

Date of Entry  < > ...

Name

Subject \*

Notes

**Step 5:** To attach the note to a team member, click on the 'search' field to the right of the 'Name' field.  
*\*The system will not allow you to type the name directly into the field.*

**Note Details**

Fields marked with \* are required.

Date of Entry  < > ...

Name

Subject \*

Notes

Click on the word 'Myself', the name of a 'Team Member' that appears in the list, or you can perform an individual search.

To perform an individual search, type in part of the surname of the person you wish to search for and then click on the magnifying glass button.

- If you need to clear the search results and conduct a new search, click on the 'x' next to the magnifying glass button.
- Entering no name into the search field and clicking on the magnifying glass button will return all possible results.

**Select Employee**

**Myself**

**Team Member**

- Fanny Marshia Young
- Flora Julie Bishop
- Maxine Richards

**Search**

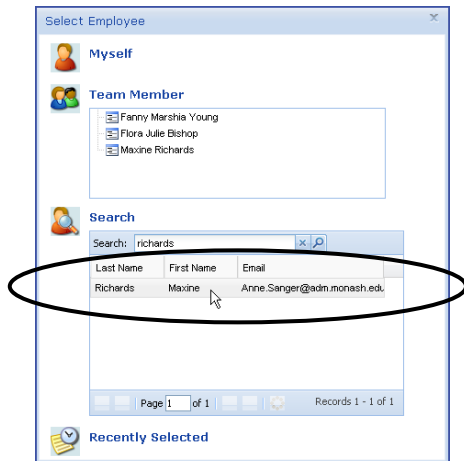
Search: richards

Last Name	First Name	Email
Richards	Maxine	Anne.Sanger@adm.monash.edu.

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**Recently Selected**

**Step 6:** Click on the name that appears in the search results to add it to note.



**Note Details**  
Fields marked with \* are required.

Date of Entry: 02/03/2009

Name: Maxine Richards

Subject \*

Notes

**Step 7:** Enter details into the 'Subject' field and the notes you want to record in the 'Notes' field.  
*\*The subject field is a mandatory field.*

**Note Details**  
Fields marked with \* are required.

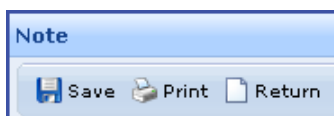
Date of Entry: 02/03/2009

Name: Maxine Richards

Subject \* Workload Allocation

Notes: Need to finalise before Monday

**Step 8:** Click on the 'Save' button.

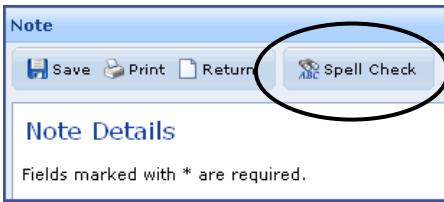


The note can be viewed, edited or deleted via the 'My Notes' icon.

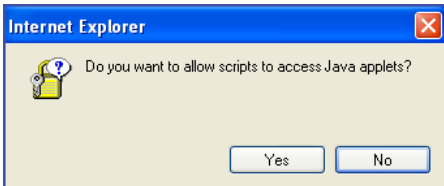
**Notebook**

Entry Date	Employee	Subject	Action
02/03/2009	Maxine Richards	Workload Allocation	<input type="button" value="- Select -"/> <input type="button" value="- Select -"/> <input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Step 9:** A spell check utility is available by clicking on the 'Spell Check' button when the note is in edit mode.

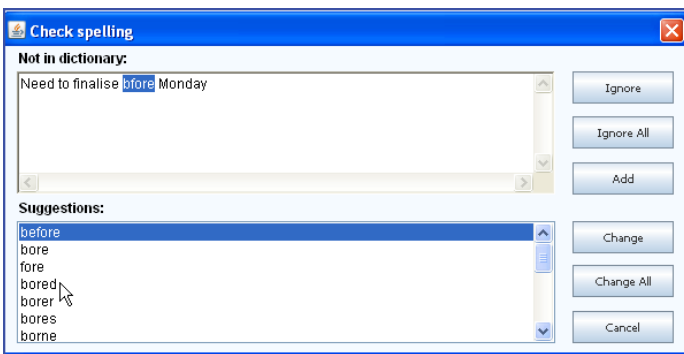


Say 'Yes' to any prompts to allow scripts to access Java applets.



**Step 10:** Perform any corrections as necessary.

*\*Words can also be added to the dictionary by clicking on the 'Add' button within the spell check utility.*



**Step 11:** To exit 'My Notes', click on the 'Dashboard' tab to return to the 'Home Dashboard' view.

If you create a note specific to a member of your team, you will be able to view the note when you are reviewing that staff member's plan. View the note by clicking on the 'Notes' button once the plan has been opened from the 'My To Do List'. Remember the note cannot be edited in the Notes tab, only via the 'My Notes' icon.



Employee Notebook		
Date	Subject	Description
Mar 2 2009	Workload Allocation	Need to finalise before Monday