



ADMIN GUIDE: NOTE SUB TYPES v1.0

Note Sub Types

Permissions/Roles Needed: Note Sub Types Admin Permission

This is a feature located in the Settings module that allows a user to add note sub types for use under the Custom Note Type. The note sub types can be selected on any note in the system in which the user selects a Type of Custom.

To add a new Note Sub Type:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select 'Settings' from the header
3. Choose 'Note Sub Type' from the side bar
4. Click Actions, then 'Add New Note Sub Type'
5. Complete wizard
6. Click Save, then yes on the confirmation window

To search for a Note Sub Type:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select 'Settings' from the header
3. Choose 'Note Sub Type' from the side bar
4. Specify search criteria then click 'Search'
5. The view below will populate with relevant data associated with your search criteria
6. To reset the search and show all Note Sub Types, click 'Reset'

To export Note Sub Types:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select 'Settings' from the header
3. Choose 'Note Sub Type' from the side bar
4. There are two options to export:
 - a. Export all Note Sub Types by clicking the 'Export' button located beneath the search filters
 - b. Use the search criteria referenced in the instructions above to show a group of filtered Note Sub Types, then click the 'Export' button located beneath the search filters
5. The file will automatically download and save to the 'Download' folder on your PC as a CSV file
 - a. This file is compatible with Microsoft Excel.

To view a Note Sub Type:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select 'Settings' from the header
3. Choose 'Note Sub Type' from the side bar
4. Click anywhere in the row to select a particular Note Sub Type

5. This will open the Note Sub Type Details Page where you can view/filter events and edit the Note Sub Type information.
 - a. All notes that have been added in the system with this sub type will appear in the Notes table. Use the filters to find desired notes.

To edit a Note Sub Type Code:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select 'Settings' from the header
3. Choose 'Note Sub Type' from the side bar
4. Click anywhere in the row to select a particular Note Sub Type; this will open the Note Sub Type Details screen.
5. Select 'Actions' then 'Edit Note Sub Type'
6. Complete desired edits
7. Click 'Save' then select 'Yes' on the confirmation window
 - a. If you wish to terminate the changes, click 'No' on the confirmation window then 'Cancel'