Using Notes: Why and How

Why

Like general messages, notes provide an easy way for Summit processors to add information to any Summit transaction. The advantage of using notes is keeping all information regarding the transaction within the transaction itself. This prevents processors from having to look in email for any pertinent information related to the transaction and allows all Summit processors to see what related work has been done to the transaction by other processors. The use of notes can also be very helpful in the AAR process.

Types of notes and how to use them

There are 3 types of notes available to Summit processors: internal, note to partner and fulfillment.

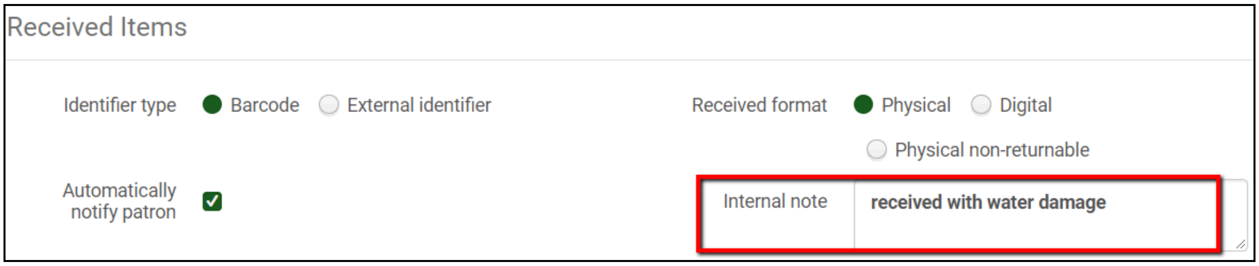
Internal notes

Internal Notes are only viewable by the institution that entered the note. These notes appear under the **Notes** tab of the institution that entered the **Note**, but do not appear in the **History** tab. **Internal notes** can be added when receiving items in the **Received Items** window or from the individual transaction record by clicking in this order:

- **Edit** button
- **Notes** tab
- Add Note
- **Add**

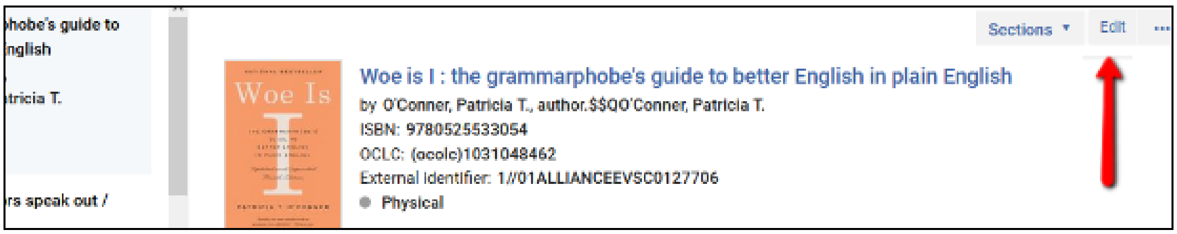
Two examples of when you might add an internal note is when 1) you want to indicate something about the physical condition of the item, and 2) you want to indicate what steps have been taken to search for an item that has been in transit too long. See screenshots below.

- Adding Internal Notes from within Receiving Items window:

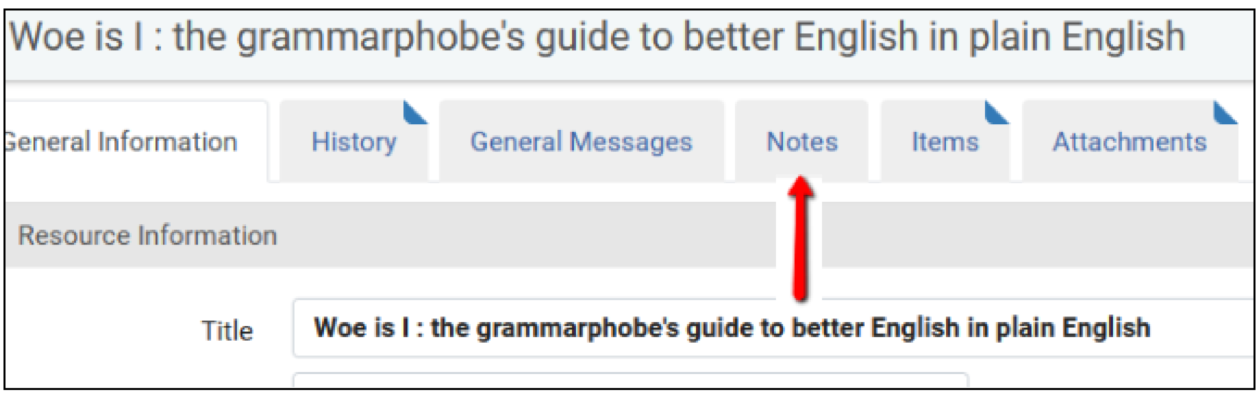


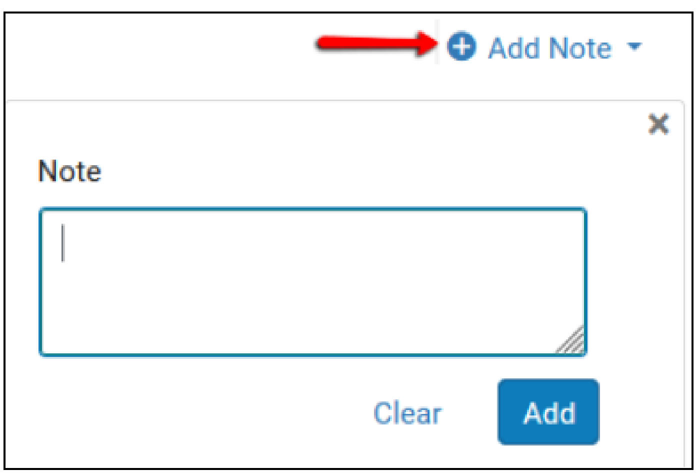
- Adding notes from individual transaction record

Choose edit from the record.



Go to notes and then add the notes.





- Example of how to use internal notes for searching for items:

1 - 4 of 4 Created by

	Created On	Updated On	Note
1...	11/25/2019	11/25/2019	NOS at UPS 6/1/2018
2...	11/25/2019	11/25/2019	emailed 6/5/2018
3...	11/25/2019	11/25/2019	NOS at UO 6/5/2018
4...	11/25/2019	11/25/2019	APB sent by JP 6/5/2018

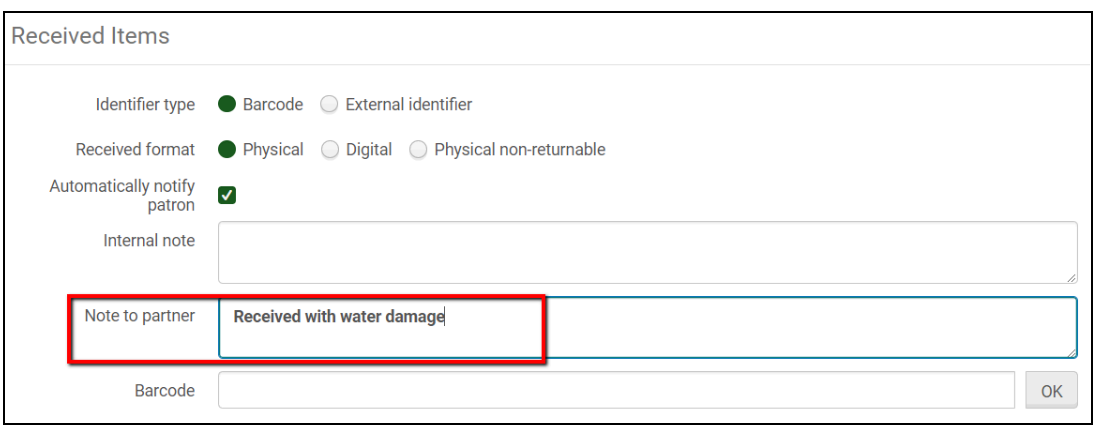
Notes to partners

Notes to partners are viewable by both institutions involved in the transaction if they are sent during the shipping and receiving process.

> Warning: The Lender has one chance to add a viewable note when shipping, and the borrower has one chance to add a note when receiving. It is necessary to use General Messages after shipping/receiving for the other partner to see the notes.

Notes to partners appear under the **Notes** tab of both institutions involved in the transaction and appear under the **History** tab as well. **Notes** to partner can be added in the **Received Items** window. One reason to use **note to partner** is to notify the lending institution by documenting any issues with the physical condition of the item(s) when receiving the item(s).

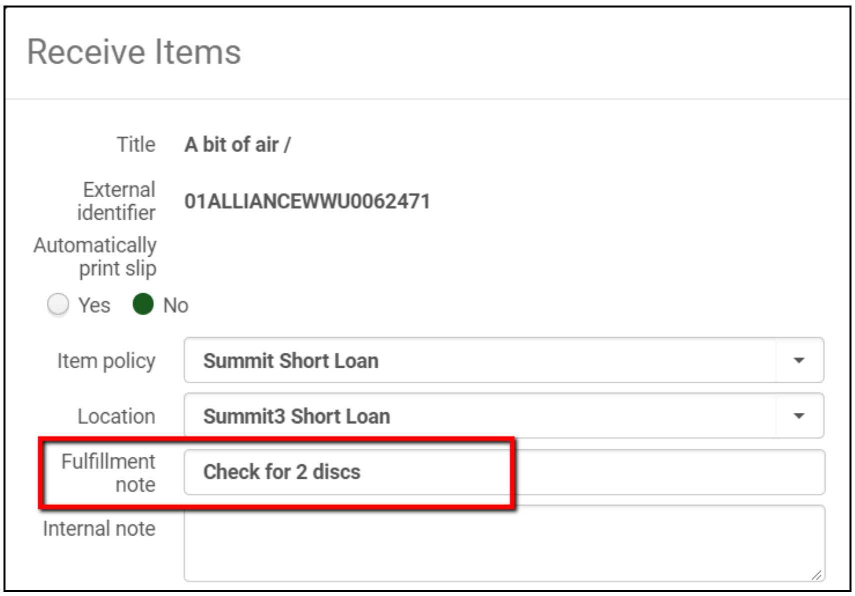
Adding **Note to Partner** from **Receiving Items Window**:



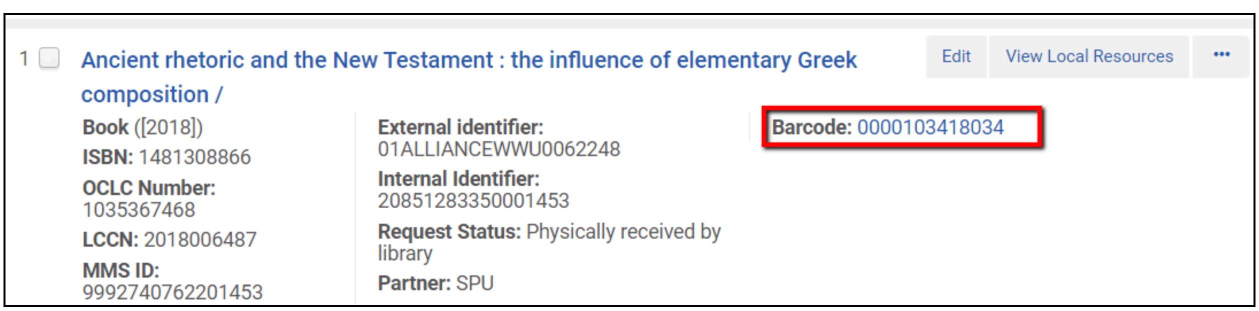
Fulfillment notes

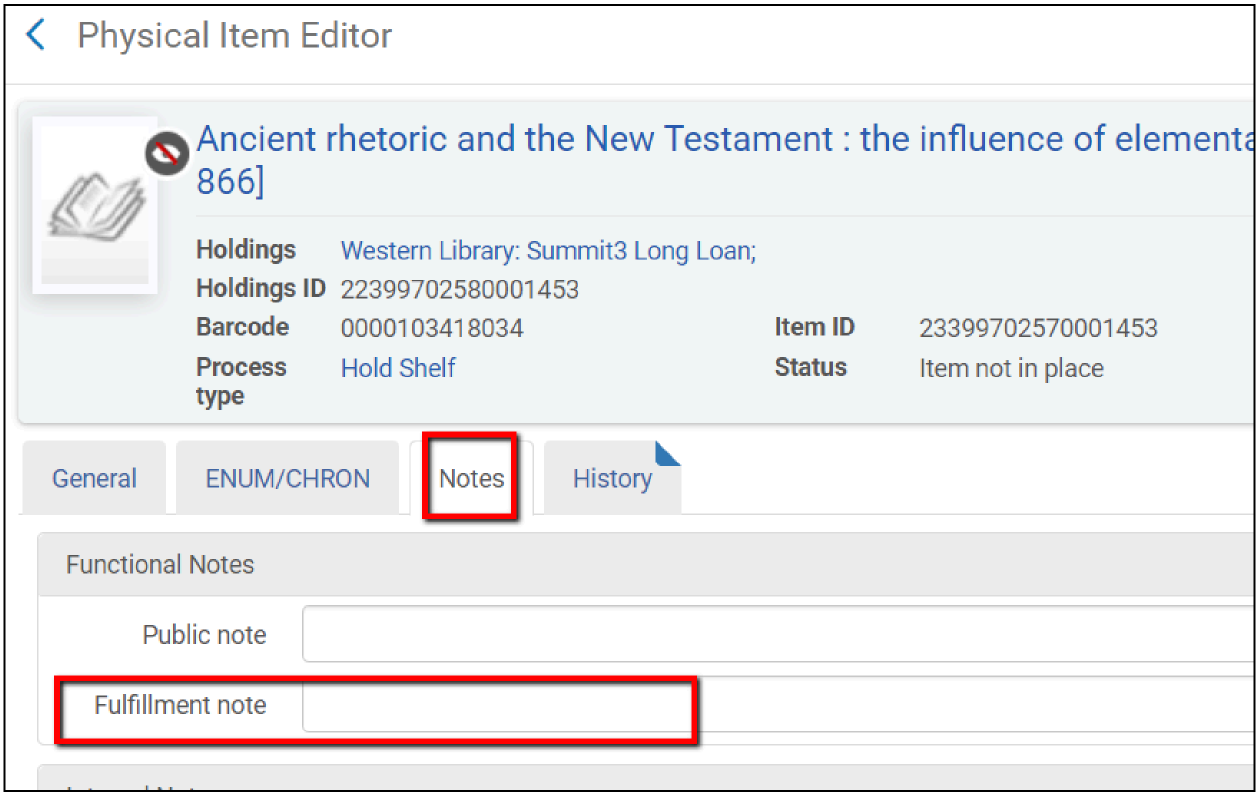
Fulfillment notes are visible to staff when checking out the item to the patron and again when scanning in the item when returned by the patron.

- Fulfillment notes can be added from the Received Items window. Once the item barcode is scanned, the second Received Items pop-up window provides processors the opportunity to enter a fulfillment note.
- A reason to use Fulfillment notes are to notify staff of additional steps to take when checking out and checking in the item at the circulation desk. These notes would most often contain actions like “check for 1 insert” or “check for 2 DVDs”.



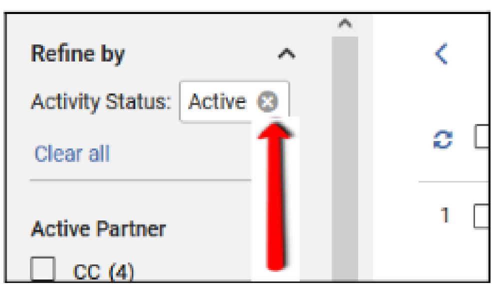
- Fulfillment notes can also be added from within the item record after receiving the item. From the transaction record, click on the barcode, click on the Notes tab, and enter your text in the Fulfillment note field.

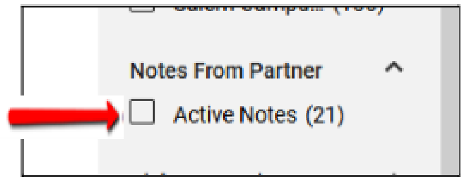




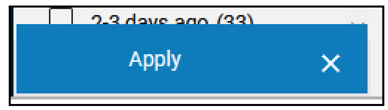
Finding Inactive Requests with Active Notes

- To find notes from the Borrowing or Lending queues:
    - Fulfillment > Resource Sharing > Lending Requests
    - OR
    - Fulfillment > Resource Sharing > Borrowing Requests
- From the facets bar, under Refine by, Select the **x** in the active box. This will show inactive requests. .





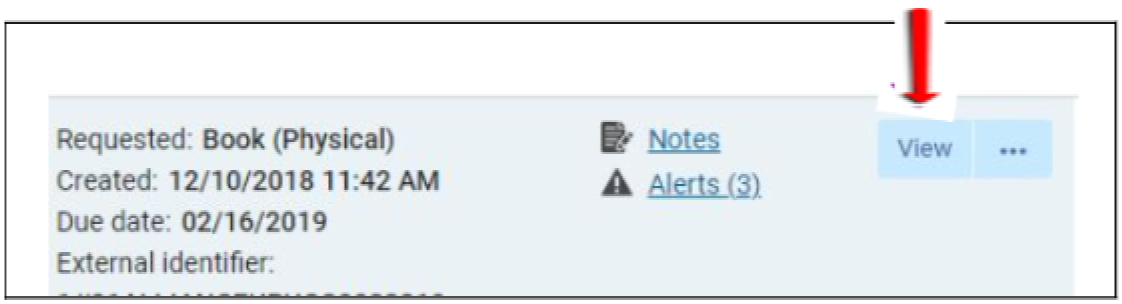
- Click the box for Active Notes
- *Notes from Partner will only appear as a facet if there are Active Notes.



- Click Apply to go to inactive requests with notes
- Requests can be further faceted as needed by status, date or whatever is needed.

To dismiss these notes:

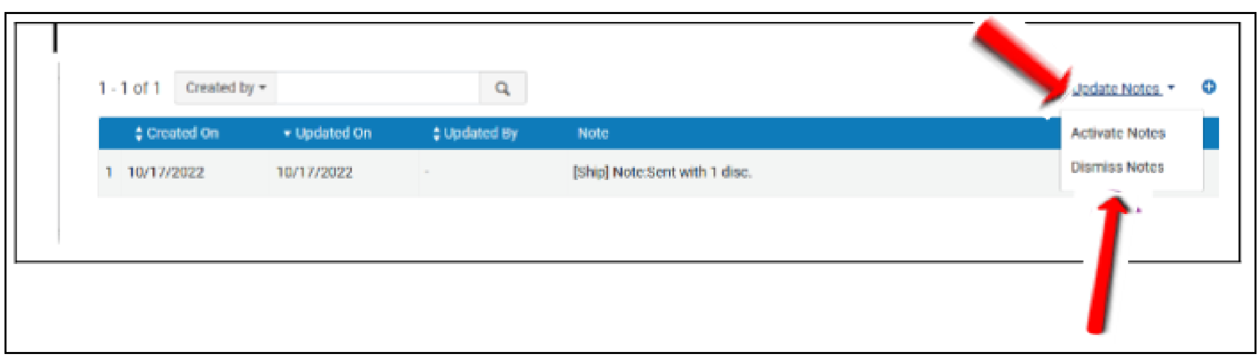
- View (not edit)



- Click on Notes Tab

Once you have read the note and no longer want it active:

- Click on **Update notes** to display dropdown and then Click **Dismiss notes**



To read the notes only

The option look at yellow sticky notes section

- Click on active notes links in the tasks list.
- Or you can facet for these messages in your Borrowing or Lending queue
- Notes within the yellow “sticky note” can be edited, but the partner will not be able to view updated changes.