
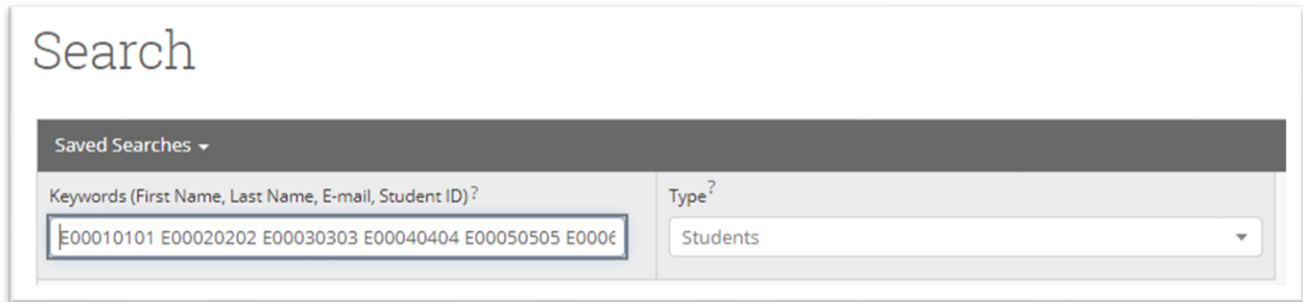


## Navigate360: Adding a Note to More than One Student

Notes can be used to record information related to a student profile, and are not tied to specific appointments.  
Notes can be made visible to students.

### 1. Run a report of students

- Click on the [Advanced Search](#)  icon from the left navigation.
- Type or paste the Student E Number(s) into the [Keywords \(First Name, Last Name, E-mail, Student ID\)](#) box under [New Search](#). Click [Search](#).
  - **NOTE:** More than one E Number may be included in one search. E Numbers must be separated by a space. E Numbers can be copied and pasted from a list in an Excel spreadsheet.



Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)?

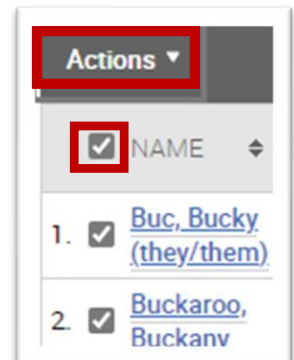
E00010101 E00020202 E00030303 E00040404 E00050505 E0006

Type?

Students

### 2. Add a Note to the list of students

- Click the box next to [Name](#) to select all of the students in the list
- Click [Actions](#) and select [Note](#) from the drop-down menu
- When the [Add a Note to Multiple Users](#) box appears, type the note into the text box
- Click Choose File to attach a file if desired
  - **NOTE:** Do not add a file with any personal identifying student or student contact information. This file will be added to the note for all students. As an example, if attaching an email which was sent to the list of students' bcc, do not include an email which reveals student email addresses
- Under the [Relations](#) box enter a [Note Reason](#)
  - **NOTE:** This is not a required step. The [Note Reason](#) must pre-exist in the system. If an appropriate [Note Reason](#) does not exist, complete the Configuration Request form

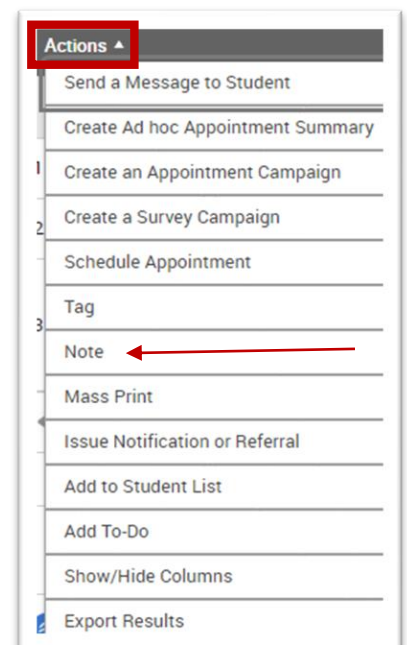


Actions ▾

NAME

1.  [Buc, Bucky \(they/them\)](#)

2.  [Buckaroo, Buckanv](#)



Actions ▾

Send a Message to Student

Create Ad hoc Appointment Summary

1 Create an Appointment Campaign

2 Create a Survey Campaign

Schedule Appointment

Tag

3 Note ←

Mass Print

Issue Notification or Referral

Add to Student List

Add To-Do

Show/Hide Columns

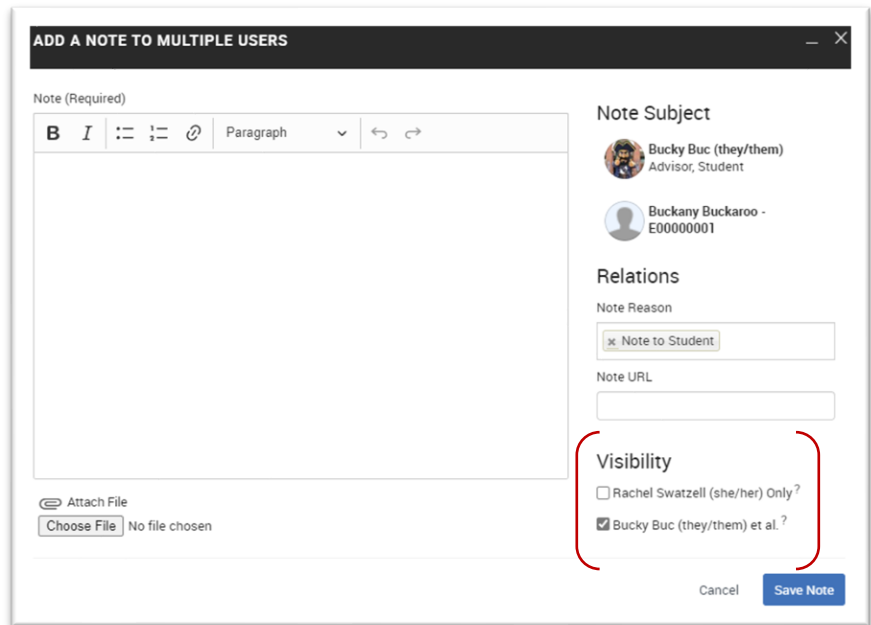
Export Results

Continued on next page...

## Navigate360: Adding a Note to More than One Student

Notes can be used to record information related to a student profile, and are not tied to specific appointments.  
Notes can be made visible to students.

- To make the Note visible to the student(s), click the box next to the Student's Name et al. under *Visibility*
  - **NOTE:** The student will not be able to see other students when viewing the Note. To the student, the Note will look like it was only applied to them
- Click *Save Note*.



The screenshot shows a dialog box titled "ADD A NOTE TO MULTIPLE USERS". It contains a rich text editor for the note, a "Note Subject" field, a "Relations" section with a "Note Reason" dropdown (set to "Note to Student") and a "Note URL" field. The "Visibility" section is highlighted with a red box and contains two checkboxes: "Rachel Swartzell (she/her) Only?" (unchecked) and "Bucky Buc (they/them) et al.?" (checked). At the bottom right, there are "Cancel" and "Save Note" buttons.