

Notes in Jackrabbit - Family, Student, Class, and Staff

Last Modified on 01/21/2021 12:09 pm EST

With Jackrabbit's Note feature you can create and keep detailed and searchable notes regarding your families, students, classes, and staff.

The *Family*, *Student*, *Class*, and *Staff* records each include a *Notes* tab where you create and store your related notes and the Notes grid allows you to work with the information in all of those records at the same time, from one place!

- ★ Strengthen communication among your staff; alerts highlight new notes to ensure nothing important is missed.
- ★ Search, tag, and filter all of the notes in the various records and work with them as a group.

The Notes Tab

The *Notes* tab in the *Family*, *Student*, *Class*, and *Staff* records is where notes are stored. From this tab, notes can be added, edited, or deleted. You can search the notes in that record, filter the notes by [tag](#), and sort the notes by the date created or by the date modified.

Student: Shawna Evans

Notes (1)

Sort by Date Created or Date Modified

1 Note

Begin typing...

Filter by tags...

↑↓ Date Modified: Newest to Oldest

October 7, 2019 3:05 PM // by helpcenter

Work Credits ← Tags

Teacher's Assistant

Shawna has been selected to be Teacher's Assistant for the Winter session and will be eligible for work credits which can be applied to her tuition fees in the Spring session.

Modified October 7, 2019 3:05 PM by helpcenter // Expires 10/07/2022

EDIT DELETE

+ NEW NOTE



Notes entered on the Notes tab in Jackrabbit are not visible in the Staff Portal or Parent Portal, they are for internal use only.

Expand each section below for more information about Notes.

Create a Note in the Family, Student, Class, or Staff Record

Click the **+ New Note** (button) on the **Notes** tab to add a note. Note titles are limited to 150 characters, however, the body of the note has no maximum character count. Optionally, tags can be added to organize your notes. [See below](#) for more information on tagging.

Add a note

Title

No Photos on Social Media

25 / 150

Note

Format B I U

Mom has asked that no photos of the kids are posted on social media.

Tags are optional and are used to organize and group notes

Tags (select all that apply)

Photo Opt Out

CANCEL ADD


+ NEW NOTE

Oldest



EDIT DELETE

Create a Note in the Families (menu) > All Families

Add a note to an individual family:

1. Go to the **Families** (menu) > **All Families** > click the row menu  > select **Add a Note**.
2. Enter the information into the **Add a Note** pop-up window:
 - Title, Note, and Tag (if applicable)
3. Click **Add**. The note can be edited or deleted in the *Family* record.

Create Notes in the Students (menu) > All Students

Add a Note to an Individual Student	<ol style="list-style-type: none"> 1. Go to the Students (menu) > All Students > click the row menu  > select Add a Note. 2. Enter the information into the Add a Note pop-up window: <ul style="list-style-type: none"> ◦ Title, Note, and Tag (if applicable) 3. Click Add. The note can be edited or deleted in the <i>Student</i> record.
Add a Note to a Group of Students	<p>Select all the students in the grid by leaving the check box in the 1st column unchecked. Or check the students in the 1st column to create a group.</p> <ol style="list-style-type: none"> 1. Go to the Students (menu) > All Students > click the More (icon)  > select Add a Note. 2. Enter the information into the Add a Note pop-up window: <ul style="list-style-type: none"> ◦ Title, Note, and Tag (if applicable) 3. Click Add. The note can be edited or deleted in the <i>Student</i> record.

Edit or Delete a Note

Individual notes can be edited or deleted from the *Notes* tab using the **Edit** and **Delete** links in each note. Notes can also be edited or deleted in the Notes grid.

The Notes Grid

The **Notes** grid, found under the *Reports (menu) > Find Reports > enter Notes in Keyword Search*, allows you to work with all of the notes throughout your system from one screen.

Jackrabbit grids are very powerful and allow you to customize your layout, search and filter your results, and manage your notes. Learn more about these grids in our Help article [Work with Grids in Jackrabbit](#).

Here are some grid highlights that relate specifically to Notes:

- **Mass delete notes** - select one or more rows with the checkboxes in the 1st column and click the

More (icon) ⓘ to delete the selected notes.

- **Export data** - leave the checkboxes in the 1st column unchecked and click the More (icon) ⓘ to export the data in the grid to Excel.
- **Edit or delete a note**- the Row Menu (icon) ⋮ to update or delete a single note.
- **Refresh the data** - click the Refresh Grid (icon) ↺ to refresh the data in the grid.

Notes

← RETURN

Type a keyword to search for specific notes.

Showing 70 of 70 Notes [?HELP WITH GRIDS](#)

Drag a column header and drop it here to group by that column

Arrow indicates the column is sorted in ascending or descending order.

Export to Excel

<input type="checkbox"/>	NOTE TITLE	TYPE	REGARDING	CREATED	BY	MODIFIED	MOD BY	TAGS
<input type="checkbox"/>	Vacation 07/28/19	Family	Bingham	Jul 12, 2019 10:31AM	Staff	Jul 12, 2019 10:31AM	Staff	Vacation
<input type="checkbox"/>	C.J. Sick	Family	Bangor	Jul 12, 2019 10:38AM	Staff	Jul 12, 2019 10:38AM	Staff	Sick
<input type="checkbox"/>	Costume Payment	Family	Champury	Jul 12, 2019 10:42AM	Staff	Jul 12, 2019 10:42AM	Staff	Costumes, Payment Issues
<input type="checkbox"/>	Emailed about Absences	Family	Culbertson	Jul 12, 2019 10:44AM	Staff	Jul 12, 2019 10:44AM	Staff	Attendance Issues, Email
<input type="checkbox"/>	Check Bounced	Family	Goolsby	Jul 22, 2019 5:51PM	Staff	Jul 22, 2019 5:51PM	Staff	Payment Issues

Add Tags to Notes

Tags enable you to group and organize your notes. Think of it as though the notes were on pieces of paper and you wanted to put them in a folder to keep them together. What would you name that folder? That is a tag. Tags also allow you to filter for a specific tag and pull up only the notes that have been given that tag making it easy to find topics at a glance.

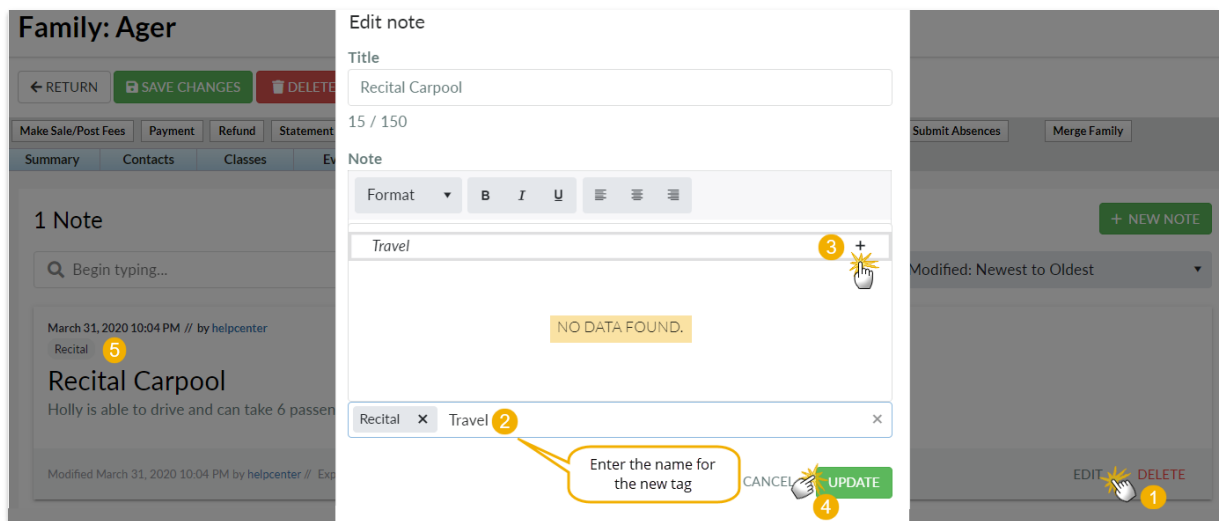
Business Scenario

Add a tag "Phone Call" and assign it to each note that is added regarding a phone conversation. This would allow you to look at only the notes you've made regarding phone calls you've had with the family, student, or staff member.

Add a Tag to a Note

A tag can be added to a note when it is first created, or by editing the note if it was added previously.

1. Use the **Edit** link to open the note if it was created previously.
2. In either the *Edit note* or *Add note* window, click into the **Tags** field to display existing tags.
3. Start typing the tag to see if it already exists. If the tag doesn't exist, use the + to add the tag. Multiple tags can be added to a note.
4. Click Update when you have finished adding tags.



Delete a Tag from a Note

To remove a tag from a note, click the **Edit** link to open the note. Click on the **x** in the tag badge to remove it.

Note: This does not delete the tag itself, it only removes the tag from the note.



Notes expire three years after their creation date, the expiration date is displayed on the note.