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

With Jackrabbit's **Notes** 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 report allows you to work with the information in all of those records simultaneously, 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.

Notes are secure and are only viewable within Jackrabbit.

These notes are not visible in the Parent Portal or the Staff Portal.

The Notes Tab

Notes are stored on the Notes tab in the Family, Student, Class, and Staff records. From this tab, notes can be added, edited, or deleted. You can also search for notes in that record, filter them by tag, and sort them by the date created or modified.

Pin important notes to the top of the list. The most recently pinned note will appear at the top of the list for all Users.

Expand each section below to learn more about working with Notes.

Add a Note Directly to the Family, Student, Class, or Staff Record

Click **+ New Note** on the Notes tab to add a note.

Note titles are limited to 150 characters, and the body of the note has a maximum character count of 10,000. Optionally, tags can be added to organize your notes. **See below** for more information on tagging.

Add a Note from the Families (menu) > All Families

Add a Note to an Individual Family	1. Go to the **Families** menu > **All Families** > click the **row menu** for a family > select **Add a Note**.
	2. Enter the information in the **Add a Note** window: ○ Title, Note, and Tag (optional) 3. Click **Add**. The note can be edited or deleted from the Family record.

Notes cannot be added to multiple families at once.

Add a Note from the Students (menu) > All Students

Add a Note to an Individual Student	1. Go to the **Students** menu > **All Students** > click the **row menu** for a student > select **Add a Note**.
	2. Enter the information in the **Add a Note** window: ○ Title, Note, and Tag (optional) 3. Click **Add**. The note can be edited or deleted from the Student record.

Add a Note to a Group of Students	Select all students in the grid by leaving the checkboxes in the first column unchecked or check selected students in the first column to create a group. 1. Go to the **Students** menu > **All Students** > **More** (icon) > select **Add a Note**. 2. Enter the information in the **Add a Note** window: ○ Title, Note, and Tag (optional) 3. Click **Add**. The note can be edited or deleted from each Student record.

Add a Note from the Classes (menu) > All Classes

Add a Note to a Single Class	1. Go to the **Classes** menu > **All Classes** > click the **row menu** for a class > select **Add a Note**. 2. Enter the information in the **Add a Note** window: ○ Title, Note, and Tag (optional) 3. Click **Add**. The note can be edited or deleted from the Class record.
Add a Note to a Group of Classes	Select all classes in the grid by leaving the checkboxes in the first column unchecked or check selected classes in the first column to create a group. 1. Go to the **Classes** menu > **All Classes** > **More** (icon) > **Add a Note**. 2. Enter the information into the **Add a Note** window: ○ Title, Note, and Tag (optional) 3. Click **Add**. The note can be edited or deleted from each *Class* record.

Edit or Delete a Note

Edit or Delete individual notes from the Notes tab in the Family, Student, and Class records using the **Edit** and **Delete** links in each note.

Notes can also be edited or deleted in the **Notes report** from the Reports menu > Find Reports > Families/Students and Classes (sections).

The Notes Report

The **Notes** report enables you to work with all notes from one screen. To access it, go to the **Reports** menu > **Find Reports** > **Families/Students** (section).

- **Search for a note** - Type a keyword in the search field to look for a specific note.
- **Edit or delete a note** - Use the **row menu** to update or delete a single note.
- **Mass delete notes** - Select one or more rows with the checkboxes in the first column and click the **More** icon   to delete the selected notes. Note: the delete option does not appear unless multiple notes have been selected.
- **Export data** - Leave the checkboxes in the first column clear and click the **More** icon   to export the grid data to Excel.

Tag Notes

Tags enable you to group and organize your notes. Imagine that the notes were on 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.

Example of Use

Add a tag "Phone Call" and assign it to each note about a phone conversation. This would allow you to look at only the notes you've made about 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. On the Notes tab of the Family/Student/Class/Staff record, click **+ New Note** to add a note or 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.

Jackrabbit offers several ways to note important business information. For a complete list, refer to **There are Different Types of Notes in Jackrabbit—Where can I view them**?