Overview

Quick Notes are notes or comments that advisors, staff, and faculty find themselves using regularly when documenting their conversations with students. Quick Notes are created, edited, deleted, and maintained by each user’s role. Once you create Quick Notes, they can be used at any time when adding an Advising Note to a student’s record.

Steps

Accessing the My Profile Menu

1. Log into AdRx.
2. From the AdRx main page, click My Profile.

The My Profile page displays. The active profile appears in the upper right corner.
Creating a Quick Note

1. Ensure the AdRx customization menu is active.
2. In the Notes Customization row, click the down arrow to expand the row.
3. Click the arrow in the Manage Quick Notes row.
4. Click New Quick Note.
5. Enter a Title, Category (or select an existing category), and the quick note text under the Note area.
3. Click **Save**.

   The Quick Note is now available when adding a Note to a student’s advising record.

### Applying a Quick Note

1. Follow the process to add an Advising Note to a student’s record. For more information on creating an advising note, review the [Advising Notes](#) job aid.

2. From either the **Add New Contact Record** or **Add Appointment Contact Record** page, click **Insert a Quick Note** from the text editor box and select the desired Quick Note.

![Image of Quick Note insertion in AdRx](image)

You can use any combination of Quick Notes and manually enter them into a single Advising Note. For example, you can insert a Quick Note into the middle of an Advising Note or insert multiple Quick Notes within one Advising Note. The Quick Notes are inserted into the text wherever your cursor is, allowing you to place one at the beginning or in the middle of text that you have already entered.

### Managing Quick Notes

Added Quick Notes can also be edited or deleted from the **Manage Quick Notes** section (located under the **AdRx** customization menu and **Notes Customization** row).
• If editing, select the desired Quick Note, make the changes, and click **Save**.

• If deleting, select the desired Quick Note and click **Delete**.

Added categories can also be edited or deleted from the **Manage Quick Notes** section.

• If editing, select the desired category, make the change, and click **Rename**.

• If deleting, select the desired category and click **Delete**.

**NOTE:** If a category is deleted, all associated Quick Notes are also removed.

4. Click **Close**.