



## All Notes Screen

AllNotesDNAapp.dnax  
DNAapp ID b54cc445-20ea-418e-b961-220f739424f8

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**Overview:**

The All Notes Screen DNAapp displays all Notes, Warnings, Lockouts, Contact Management records, and Dynamic Messages related to the selected entity. It also includes functionality to both open the DNA “Notes” screen to manage note creation, deletion, and editing, and to open a pop-up screen to edit note text and inactivation.

Notes can be added for entities that do not currently have any notes.

AllNotes is accessible from Relationship Profile, Person Maintenance, and Organization Maintenance screens.

Records selected include:

- Account, Person, Organization level Notes
- Warnings and Lockouts, both with and without notes
- Contact Event Management records if the DNAappstore application “Contact Management” is installed
- Dynamic Messages

Yes/No Institution Options are available to control which records to display.

- AllNotes Display Warnings
- AllNotes Display Lockouts
- AllNotes Display CEM Notes
- AllNotes Display DynMsg
- AllNotes Display CLS AcctRoles

**Key Benefits:**

DNA allows users to create, store and access notes in numerous places throughout the system. And while the standard notes functionality satisfies the needs of most users, for some users with lots of notes in lots of places, it can be hard for customer/member-facing staff to quickly find relevant notes during an account holder interaction. As a result, service interactions can take longer than they should, critical notes can be missed, and in some cases, employees stop checking notes all together, leading to lost revenue and negative customer/member experiences.

The All Notes Screen DNAapp consolidates all the notes, warnings, lockouts, Contact Event Management (CEM) notes, and dynamic messages related to the person/organization being served into a single, easy-to-access screen so that your tellers and other outward-facing staff can find relevant notes fast. With the click of a button, the app shows all the notes associated with the current entity’s person, account, and organization records in a way that is easy to search, sort and filter.

By enabling your staff to quickly zero-in on the key notes relevant to the current business need, this app will help your staff spend more time engaging with your account holders instead of clicking through core. The All Notes Screen DNAapp increases service speed and quality while helping ensure your employees don’t miss important information during customer/member interactions.

**Processing:**

When the AllNotes screen is launched it uses the Account Number selected in Relationship Profile (if no account record is selected either the Organization or Person processing is followed), the Person number from Person Maintenance, or the Organization Number from Organization Maintenance and selects notes as follows:

## From Relationship Profile:

- All Person Notes for the tax reported for on the account number being queried
- All Person Notes for all persons with an effective non-employee role<sup>1</sup> on any account number the person number being queried is the tax reported for
- All Organization Notes for the tax reported for on the account number being queried
- All Organization Notes for all organizations with an effective non-employee role on the account number being queried
- All Account Notes for the account number being queried
- All Account Notes for all accounts with the same tax reported for Person or Organization as the account number being queried
- Account Lockouts with Notes for the account number being queried
- Account Lockouts without Notes for the account number being queried
- Account Lockouts with Notes for the all account numbers with the same tax reported for person or organization number as the account number being queried
- Account Lockouts without Notes for the all account numbers with the same tax reported for person or organization number as the account number being queried
- Account Warnings with Notes for the account number being queried
- Account Warnings without Notes for the account number being queried
- Person Warnings with Notes for the all account numbers with the same tax reported for person or organization number as the account number being queried
- Person Warnings without Notes for the all account numbers with the same tax reported for person or organization number as the account number being queried
- Person Warnings with Notes for the tax reported for person on the account number being queried
- Person Warnings without Notes for the tax reported for person on the account number being queried
- Person Warnings with Notes for all person numbers with a non-employee role on the account number being queried
- Person Warnings without Notes for all person numbers with a non-employee role on the account number being queried
- Organization Warnings with Notes for the tax reported for organization on the account number being queried
- Organization Warnings without Notes for the tax reported for organization on the account number being queried
- Organization Warnings with Notes for all organization numbers with a non-employee role on the account number being queried

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<sup>1</sup> If an person has both a non-employee role (e.g. 'SIGN') and an employee role (e.g. 'ACTO') notes will be selected and displayed due to the non-employee role

- Organization Warnings without Notes for all organization numbers with a non-employee role on the account number being queried

From Person Maintenance:

- All Person notes for the person number queried
- All Person notes for all persons with an effective non-employee role on any account number the person number being queried is the tax reported for
- All Organization notes for all organizations with an effective non-employee role on any account number the person number being queried is the tax reported for
- All Account notes for any account number the person number being queried is the tax reported for
- All Account Notes for any account number owned by an organization that the person number being queried has an effective non-employee role on
- CEM Person Notes where the designated contact person is the person number being queried
- CEM Person Notes where the designated contact person has an effective non-employee role on any account number the person number being queried is the tax reported for
- CEM Organization Notes where the designated contact organization has an effective non-employee role on any account number the person number being queried is the tax reported for
- CEM Account Notes for any account number where the designated contact person is the person number being queried and is the tax reported for
- CEM Account Notes for any contact account number that the person number being queried has an effective non-employee role on
- Account Lockouts with Notes for any account number the person number being queried is the tax reported for
- Account Lockouts without Notes for any account number the person number being queried is the tax reported for
- Account Warnings with Notes for any account number the person number being queried is the tax reported for
- Account Warnings without Notes for any account number the person number being queried is the tax reported for
- Person Warnings with Notes for the person number being queried
- Person Warnings without Notes for the person number being queried

From Organization Maintenance:

- All Person notes for all persons with an effective non-employee role on any account number the organization number being queried is the tax reported for
- All Organization notes for the organization number queried
- All Organization notes for all organizations with an effective non-employee role on any account number the organization number being queried is the tax reported for
- All Account notes for all account numbers the Organization number being queried is the tax reported for

- CEM Person Notes for any person designated as the contact person with a non-employee role on any account number the organization number being queried is the tax reported for
- CEM Organization Notes for the organization being queried where the organization is designated as the contact organization
- CEM Organization Notes for any organization designated as the contact organization with a non-employee role on any account where the organization number being queried is the tax reported for
- CEM Account Notes on any account where the organization number being queried is the tax reported for
- Account Lockouts with Notes on any account where the organization number being queried is the tax reported for
- Account Lockouts without Notes on any account where the organization number being queried is the tax reported for
- Account Warnings with Notes on any account where the organization number being queried is the tax reported for
- Account Warnings without Notes on any account where the organization number being queried is the tax reported for
- Organization Warnings with Notes on any account where the organization number being queried is the tax reported for
- Organization Warnings without Notes on any account where the organization number being queried is the tax reported for

**Screens:****All Notes:**

The All Notes screen displays records selected based on Institution Option settings and includes functionality to open screens that create and edit notes. It can be launched from menus within Relationship Profile, and both Person and Organization Maintenance screens.

**Navigation:**

Relationships Module:

Relationships > Maintenance > Person/Member > Edit Person > Additional > All Notes

Relationships > Maintenance > Person/Member > Edit Person > Relationships > Relationship Profile > More > All Notes

Relationships > Maintenance > Deposit > Inquiries > Relationship Profile > More > All Notes

Relationships > Maintenance > Loan > Show Menu > Inquiries > Relationship Profile > More > All Notes

Relationships > Maintenance > Organization > Additional > All Notes

Relationships > Maintenance > Organization > Relationships > Relationship Profile > More > All Notes

Relationships > Maintenance > Loan Accounts > Show Menu > Maintenance > All Notes

Relationships > Maintenance > Deposit Accounts > Maintenance > All Notes

Services > Relationships > Quick Inquiries > Relationship Profile > More > All Notes

### Screen Appearance:

Default column order is displayed. Columns can be sorted, re-ordered and resized by the user. Three checkboxes provide preset filtering options, and a text box can be used to custom filter the records by any text in a note. Inactive notes and notes on closed accounts are defaulted to not display on screen load.

The account number drop-down can be used to select accounts to add notes to. A person or organization entity can be selected by radio button and notes added as well.

If the AuthItem “CAPR 7704” and the AuthItem “CoreAPI ALNTItem” are granted to the end user through an AuthCode, then additional account numbers the entity has a relationship to will be added to the list even if they do not have any notes currently associated to them.

### Messages:

Reason	Message
All Notes screen is accessed from the Relationship Profile screen without selecting any person or organization the message  All Notes screen closes after the Ok button is clicked	No Account, Person, or Organization selected
No notes are found	No Notes found
Will only display if there is an issue on screen load determining the entity type and entity number	No Account Number selected Person not found Organization not found
Screen launched from Organization or Account, and a person number cannot be determined	Please select a Person level record for the person number to create a note for
Screen launched from Person or Account, and an organization number cannot be determined	Please select an Organization level record for the organization number to create a note for
Entity has no accounts, or account number to use cannot be determined	No account number available to create a note for
Entity Type based on radio button selection could not be determined to create a new note for	Please select a Note type to create
Prompt before note creation	Create a new note for [note level] [entity number] ?

Test account records for A Busy Restaurant

All Notes

All Notes

A Busy Restaurant  
 Displaying 42 of 48 Notes (selected by Organization)

1000987856 (Participation Loan A Busy Restaurant)

**Filters**

Hide non-TRF Notes

Hide Inactive Notes

Hide Notes on Closed Accounts

**Filter By Text**

Apply Note Filter

Reset All

**Select a Note type to Create**

Account 1000987856

Person

Organization 17692

Query

Create Note

All Notes

Name	Identifier	Level	Class	Sub Class	Other	Status	Created Date/Time	
A Busy Restaurant	1000987856	Account	Note	DEFAULT	Lockout: Baker ...	ACT	7/30/2008	The Bako
A Busy Restaurant	1000987856	Account	NetPromoter	Member Comment		ACT	8/4/2017 4:57 PM	This mer
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	4/6/2016 2:38 PM	4-6-16 T they ser
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	3/29/2016 11:31 AM	03-29-16 CAH
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	3/11/2016 10:41 AM	Maturity
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	1/7/2016 1:34 PM	01-07-16 they ser
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	12/7/2015 5:11 PM	12-7-15 they ser
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	11/27/2015 11:41 AM	MOD - C
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	10/6/2015 1:22 PM	10-06-15 they ser
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	7/3/2015 1:21 PM	7-3-15 T they ser
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	6/3/2015 1:22 PM	6-3-15 T they ser
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	4/3/2015 1:11 PM	4-3-15 T they ser
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	3/4/2015 3:38 PM	This is a send.
A Busy Restaurant	1000987856	Account	Note	DEFAULT		ACT	2/6/2015 3:02 PM	02-06-15 they ser

Close



Columns continued

Note Text	TRF Y/N	Created By	Inactive Date
The Baker Hill Flag is utilized by the Business Banking Dept. PROCEED WITH TRANSACTION	Y	[Redacted]	
This member is very very HAPPY!!!	Y	Henry A. Banke...	
4-6-16 This is a Participation Loan. Payments are received monthly [Redacted] At this time, Receivables have to be maintained to agree with the report they send. CAH	Y	Carol-Ann Ban...	
03-29-16 Per modification from lead bank dated January 31, 2016, but not received until March 28, 2016, maturity date was changed from 01-31-16 to 04-30-16. CAH	Y	Carol-Ann Ban...	

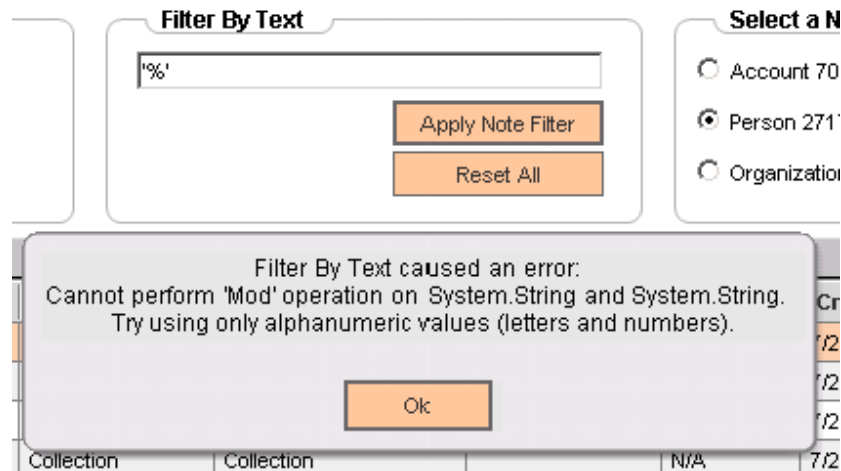
**Field Listing:**

Field	Description
<b>Informational Labels</b>	
Entity Full Name	Example shown: A Busy Restaurant
The number of displayed notes with respect to the total number of notes	Example shown: Displaying 49 of 49 Notes (selected by Person/Organization/Account)
<b>Account List</b>	
Drop Down list	A list of accounts the entity plays a role on. The drop-down will populate with all account numbers held in the data grid.  Additional account numbers will be added through a call to the CoreAPI if the end user has the CAPR 7704 AuthItem
<b>Filtering Checkboxes</b>	
Hide non-TRF Notes	Only account notes on which the entity is the tax reported for are displayed
Hide Inactive Notes	All notes that are inactive with respect to the current post date are removed from the display. Default on screen load is checked
Hide Notes on Closed Accounts	Hides all notes for accounts that have a closed status. Default on screen load is checked
<b>Filtering Textbox</b>	

Field	Description
Filter By Text	Clicking the Apply Filter button will remove all notes from the display that do not contain all of the characters in their Note Text column. For example, typing "ACH" into this box and clicking the Apply Filter button will result in only notes with note text that contains "ACH" being displayed. Note that a maximum of 30 characters can typed into the search box and some characters can cause errors (see message below). No wild cards (e.g. %) characters are needed.
<b>Create</b>	
Radio Buttons	
Account Note	Enabled and selected if the selected record is an account level note; also displays the account number of the selected account level note
Person Note	Enabled and selected if the selected record is a person level note
Organization Note	Enabled and selected if the selected record is an organization level note
<b>Buttons</b>	
Apply Note Filter	Filters notes on Note Text by the text entered into the "Filter By Text:" text box
Reset All	Clears the "Filter By Text:" textbox and resets the display to the screen load default
Create Note	Opens DNA Notes screen with the value of the selected radio button
Close	Closes the screen
Query	Executes the select statement to refresh the records in the data grid
<b>Fields (default order)</b>	
Name	Full Name of the entity the note is associated with
Identifier	The account number, person number, or organization number the note is associated to. The value of the column "Level" is relevant to the value in this column.
Level	One of four levels: Account, Person, Organization, Dynamic Message which refer to account notes, person notes, organization notes, dynamic messages
Class	The Note Class Description
SubClass	The Note SubClass Description
Other	Used for Lockouts and Warnings The value displayed is either the lockout flag or warning flag description.  Examples: Lockout: + lockout flag description Warning: + warning flag description
Status	The current account status code if the level is "Account"; otherwise the value is "N/A"
Created Date/Time	Date the note was created. Will include the time stamp if the time stamp exists on the record
Note Text	The text of the note

Field	Description
TRF Y/N	Value is Y if the level is "Account" and the Name is the tax reported for; otherwise value is N
Created By	Full Name of the person who created the note
Inactive Date	The inactive date of the note. The Inactive date cannot precede the System Post Date.

Using some characters in the "Filter By Text" box can cause errors. No wild cards are needed.



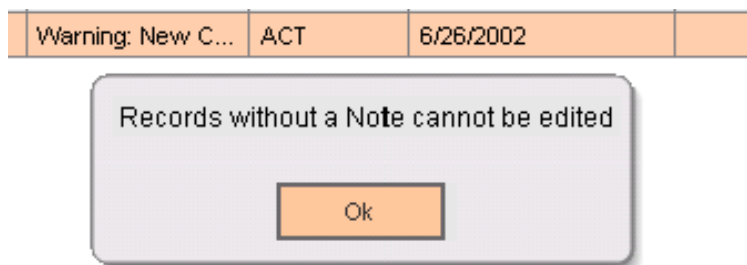
**All Notes – Edit Note:**

The screen allows for editing of Note Text and Note Inactive date if the record has a note number and is not a dynamic message or Contact Event Management note.

The Authority item Account Maintenance ("AMNT") is required to open this form.

The Authority items "CAPR 7722" and "CoreAPI ALNTItem" OR the AuthCd "ALNT" which has both AuthItems in it, and is installed with the application, will need to be granted to any end user that will update notes using the double-click on a note record feature of this application.

Message boxes that can be displayed:



Level	Class	Sub Class	Other	Status
Dynamic Message	Cross-sell	Certificate Pro...		N/A

Dynamic Message notes cannot be edited through this screen

Ok

Contact Event Management		N/A	4/17/2019	test CEM
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Contact Event Management notes cannot be edited through this screen

Ok

Inactive Date

An existing Inactive Date value can be changed but cannot be set to null

Ok

Inactive Date

Inactive date cannot precede the System Post Date

Ok

**Navigation:**

Double-click on a record in the data grid to open this modal screen.

**Screen Appearance:**

The screenshot shows the 'All Notes - Edit Note' window. The title bar reads 'All Notes - Edit Note'. The main title is 'All Notes - Edit Note'. Under the 'Edit Note' section, there are two sub-sections: 'Select Note Properties' and 'Note Text'. In 'Select Note Properties', 'Class' and 'Sub Class' are both set to 'Collection'. 'Inactive Date' is empty. A calendar pop-up is open over the 'Inactive Date' field, showing July 2020. The date 7/27/2020 is highlighted. The 'Note Text' field contains 'On time payments XX-XX-XXXX'. At the bottom, there are 'Close' and 'Process' buttons.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

The screenshot shows the 'All Notes - Edit Note' window. The title bar reads 'All Notes - Edit Note'. The main title is 'All Notes - Edit Note'. Under the 'Edit Note' section, there are two sub-sections: 'Select Note Properties' and 'Note Text'. In 'Select Note Properties', 'Class' and 'Sub Class' are both set to 'Collection'. 'Inactive Date' is now set to '07-28-2020'. A dialog box is open over the 'Inactive Date' field, titled 'Updated Note Number 860' with an 'Ok' button. The 'Note Text' field contains 'On time payments XX-XX-'. At the bottom, there are 'Cancel' and 'Process' buttons.

**Field Listing:**

Field	Description
<b>Select Note Properties</b>	
Class	Displays the class of the selected note – display only, cannot be changed
Sub Class	Displays the sub class of the selected note – display only, cannot be changed
Inactive Date	Inactive date of the Note. If the Inactive Date has an existing value that value can be changed but cannot be cleared/set to null
Text Area	Currently holds “DIR PMT SET UP TO BEGIN 1/1/13”. Enter and delete text as needed
<b>Buttons</b>	
Close	Closes the screen
Cancel	The Close button changes to a Cancel button if any changes are made
Process	Uses the CoreAPI 7722 call to update the note using the values displayed

**App Interactions**

The All Notes Screen DNAApp will capture the optional restriction (warning flag) notes written to PERSWRN created by the Contact Management DNAApp developed by COCC as well as the other notes created by the Contact Management DNAApp that are stored in OSIEXTN.CONTACTEVENTNOTE.

**Additional Requirements:**

- DNA 4.2.2 or above
- DNA CoreAPI 1.6.1 or above
- .NET Framework 4.5.2 (minimum)

**Configuration:**

Item	Test Environment	Production Environment
Authorizations		
Institution Options		

**Authorizations:**

Grant authorization item Account Inquiry ('AINQ') to end users who need access to the All Notes screen.

Grant authorization item “CAPR 7704” and “CoreAPI ALNTItem” to end users in order for account numbers selected by Core API 7704 to be added to the drop-down. Without CAPR

7704 the account numbers drop-down will hold only account numbers listed in the Notes display grid.

Grant authorization item Account Maintenance ('AMNT') to end users who need to open the Edit Note screen.

The authorization items "CAPR 7722" and "CoreAPI ALNTItem" OR the AuthCd "ALNT" which has both AuthItems in it and is installed with the application will need to be granted to any end user that will update notes using the double-click on a note record feature of this application.

ALNT	CoreAPI ALNT		No	Yes	Yes
CALL	Call Center DNAapp		No	No	No
CCMI	Credit Card Module Import		No	Yes	Yes

**Available**

- Account Combined Statement Mai
- Account Copy Transaction
- Account Cycle Maintenance
- Account Draw Maintenance
- Account Exclude Maintenance
- Account External Account Maint
- Account File Swap Maintenance
- Account Group Maintenance
- Account Inquiry
- Account Interest Parameter Mai
- Account Mail Maintenance
- Account Management Hold Mainte
- Account Memo Balance Mainten
- Account Minor Change Mainten

**Selected**

- Account Maintenance
- CAPR 7704
- CAPR 7722
- CoreAPI ALNTItem

**Institution Options:**

Navigate to Services -> System -> Institution -> Institution Options  
 Select the Institution Option Category "Uncategorized"

Set each of the options to Yes or No to control the selection and display of those types of Notes. For example, setting AllNotes Display Lockouts ("ALN2") to "No" will prevent Lockouts from being selected and displayed in the AllNotes screen.

### Institution Option

Selection Criteria				
Institution Option Category		Uncategorized		

Institution Options				
Values				
Code	In Use YN	Value	Description	Data Type
ALN1	Yes	Yes	AllNotes Display Warnings	Yes/No
ALN2	Yes	Yes	AllNotes Display Lockouts	Yes/No
ALN3	Yes	Yes	AllNotes Display CEM Notes	Yes/No
ALN4	Yes	Yes	AllNotes Display DynMsg	Yes/No
ALN5	Yes	Yes	AllNotes Display CLS AcctRoles	Yes/No

### Revisions

Date	App Version #	Change
6/2020	2.6.0.3	Fixed bug regarding the banner information disappearing when navigating from the All Notes screen to the Organization screen
12/2018	2.6.0.2	Reset Activetask values on Form Close bug fix
11/2018	2.6.0.1	SSO fix for DNA 4.4.1 and above
8/2018	2.6.0.0	Added AllNotes Display CLS AcctRoles Institution Option
5/2018	2.5.0.0	Uses International Standards Date Format rather than the FI.DateFormat value  Added clarity to the account drop-down messaging and auth items  Added minor account description to all accounts in the drop-down  Fixed select to include account level notes for all accounts a TRF has a non-employee role on
08/2017	2.3.0.1	Fixed duplicate warning and lockout records being selected Fixed code so that screen can be used to add notes when no notes are found
07/2017	2.3.0.0	Replaced 'mm-dd-yyyy' date formatting with Financial Institution date formatting Fixed inaccurate Edit Note Inactivedate message  Added installation/uninstallation of Relationships > Maintenance > Loan Accounts > Show Menu > Maintenance > All Notes menu item
05/2017	2.2.0.0	Fixed the order of two columns, noteclass and notesubclass, in one of the person level select statements  Changed select statements to return the value in the Note tables' CreateDateTime column rather than the CreateDate column



Date	App Version #	Change
		Added functionality to allow notes to be created even if no notes exist
10/2016	2.0.0.0	Added column "Other" to the datagrid  Added Lockouts, Warnings, Contact Event Management notes, and dynamic messages  Added four Bankoptions under System -> Institution Options -> Institution Option Category Uncategorized
07/2016	1.0.0.2	Added code to handle note create date and inactive date columns that include a timestamp  Added Note Class and SubClass descriptions  Fixed bug that allowed inactive notes to still be displayed on their inactive date
10/2015	1.0.0.1	Enhanced select for person notes to include account notes on organization owned accounts on which the person plays a role
07/2015	1.0.0.0	DNAapp Created