

Managing objects

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Creating and editing notes

You can create, edit, and delete messages in RICOH ProcessDirector to communicate status across shifts, announce system maintenance, or any other messages you need to post in the application. Your coworkers can respond with reactions and replies to facilitate dynamic conversations.

- ▶ To open and close the **Notes** panel, click  from the banner at the top of the page.
 - A red bullet on the icon indicates unread notes.
 - A red bullet with an @ symbol indicates unread notes where you are mentioned.
- ▶ To post a note:
 1. Click **Add a note** and enter your message.
 - To mention a coworker, type @ followed by their **User name** or **Display name**.
 - To mention an object, type # followed by its name.
 2. Click **Post note** to submit your message.
- ▶ To edit your note:
 1. Hover over the note and click **Edit**.
 2. Make the changes and click **OK** to save.
- ▶ To reply to a note:
 1. Hover over the note and click **Reply**.
 2. Enter your response and click **Post note** to submit.
- ▶ To narrow down the notes, use the filter option to quickly retrieve specific past communications.
You can also narrow down results by selecting a mention (@user_name) or an object to view only the messages related to that person or object.
- ▶ To remove a note or a reply:
 1. Hover over the note and click **Remove**.
 2. On the confirmation dialog, click **OK**.
- ▶ To remove multiple notes:
 1. Click the three dots at the top of the panel and select **Remove all displayed notes**.
 2. On the confirmation dialog, click **OK**.

 **Note:**

- Only the notes currently visible in the **Notes** panel are deleted. You cannot manually select multiple notes for selective deletion; this action removes all visible notes at once.

 **Note:**

- To maintain a clean and organized system, notes are automatically deleted after a predefined expiration period to make sure only relevant content is retained.
- RICOH ProcessDirector creates a record of the removed notes in the audit files.
- **Notes** are accessible exclusively within the RICOH ProcessDirector interface and are not distributed through external channels such as email or third-party messaging systems.

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