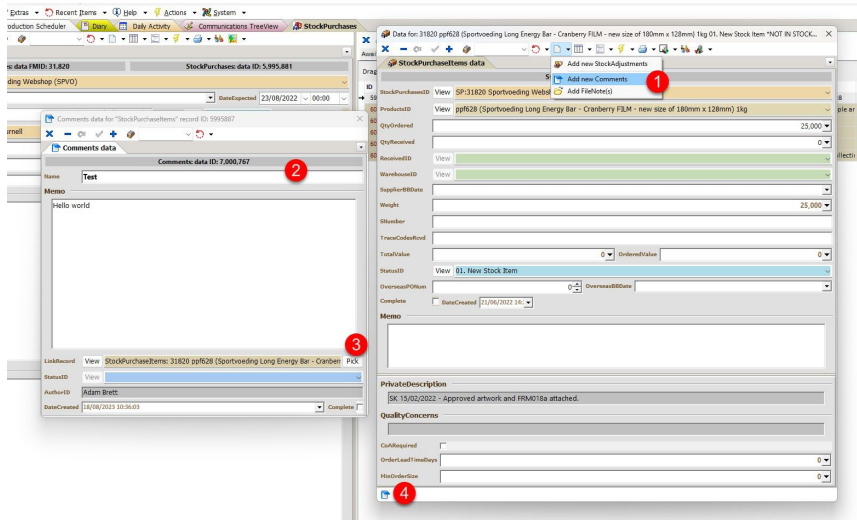


Issues with Adding Comments and FileNotes

Occasionally a new "Comment" or "FileNote" record may not link to the record the user expects. To stop this happening it is worth checking that the "LinkID" is correct when adding a Comment/FileNote. The issue is particularly likely when the user has multiple Edit Form windows open at the same time, making it harder for Orixia to know which record to link the new data to.

Conventional way of adding comments



Conventional way of adding comments

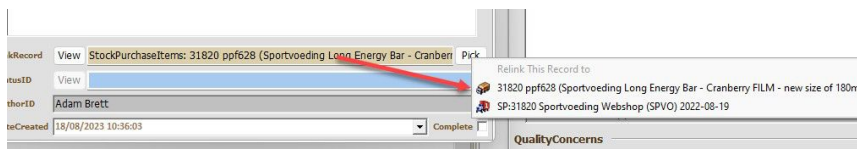
Usually a Comment or FileNote is added with the following steps:

1. Select "Add new Comments/FileNote"(s) from the "New Item" button.
2. Type in the name and memo for the Comment, or pick the FileName to link to.
3. Orixia will automatically set the "LinkID" of the Comment to match the currently open Link-Record.
4. When the view of the Link-Record is refreshed, the "Comment" icon will appear at the bottom of the edit-form's window.

Occasionally the setting of the "LinkID" can fail. This is especially likely if the user is moving between different edit-forms and adding multiple Comments linked to different records in quick succession. The record that Orixia thinks you want to link to may not be the same as the one you expect.

The "Add new Comments" command should still work but it is possible that the "LinkID" will be set connecting the Comment to a different record from the one the user expects.

Users can update the "LinkID" themselves, and double check the linked record



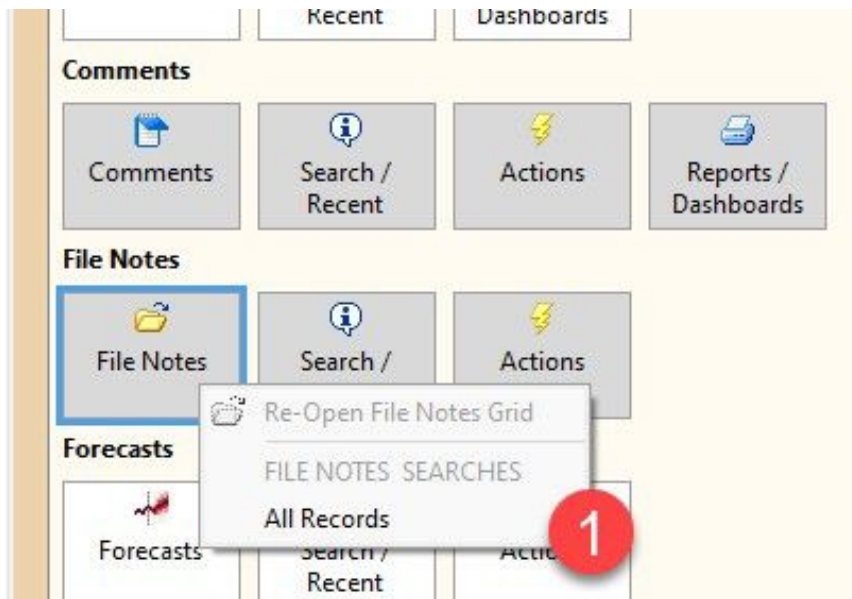
Picking a new "LinkID" for a Comment

If you are creating a lot of Comments and adding them to different records in different parts of your system, it is always useful to just glance at the "LinkID" and confirm it is correctly connected.

If the details in the LinkID field match the record you want to be linked to, do nothing. If the LinkID describes a different record, then click on the "Pick" button and change the record that the Comment is linked to. Note that the "Pick" button lists all currently open records, if you want to be sure you are picking the correct record, open it before clicking "Pick" and it will automatically appear at the top of the list.

Tracking down "lost" Records in the Comments or FileNotes data-tables

If you add Comments or FileNotes records and then cannot find them, because they have not linked correctly you can track them down, by looking in the Comments or FileNotes Grid.



Accessing the FileNotes Entity

To do this find the "Comments" or "FileNotes" Entity, on the System Entities page as shown at 1., in the image above, and pick from the available Searches. This should allow you to see all Comments or FileNotes you have added in a specific date-range. The lost records should be present there. Once you find them you can open them and check their "LinkID" and correct it if necessary.