

The Comments and FileNotes Edit Forms

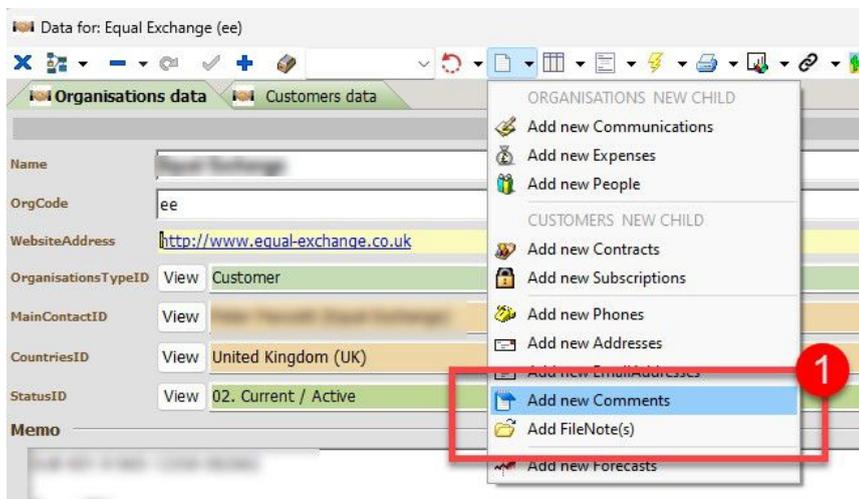
It is often useful to be able to add Comments, or any kind of long-form note to a data-record. For example with a Product record staff members may want to add notes of a variety of types, or random thoughts. Rather than trying to capture these pieces of optional extra data in columns in the BusinessObject, Orixia allows "Comments" to be added as Child-records.

Examples of Comments could be notes made by different staff linked to Product as it goes through a development process or informal notes about a Project while it is being worked on.

The "FileNotes" concept is similar, but allows the linking of any number of external files (such as documents, PDFs etc.) to a data-record for reference.

Examples of FileNotes might be detailed Product Specification documents (linked to a particular Product-record), or Word documents and Excel Spreadsheets linked to a particular Project.

Adding Comments or FileNotes



Comments and FileNotes from an Edit Form

Add New Comments

When the user clicks on "Add New Comments" a new record will be added to the "Comments" data-table, with a link to the current record. An Edit Window will be shown, containing this record, allowing the user to immediately add notes and comments.

Add FileNote(s)

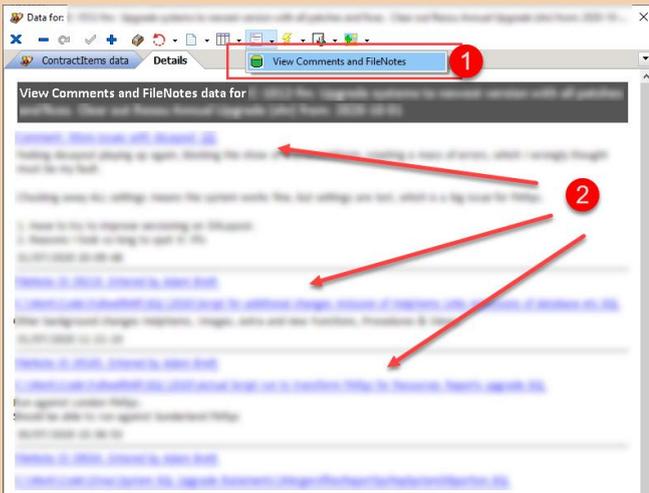
When the user clicks on "Add FileNote(s)", this will immediately open a File-dialog allowing the user to pick one or more external files. Records will be added to the "FileNotes" table, with the file-name and a link to the current record.

The FileNotes Edit Window is **not** shown in this step. If the user wants to edit the FileNote record (adding comments or other notes) they must open it from the Comments and FileNotes View (see below).

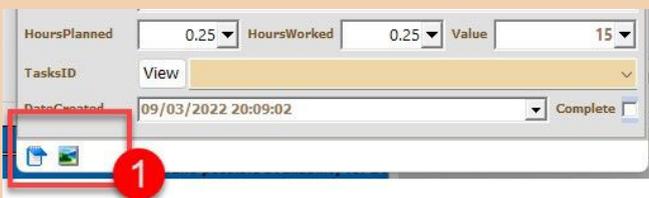
Viewing Comments or FileNotes

A general summary of Comments and FileNotes can be seen by clicking the "View Comments and FileNotes" menu-item, as shown at 1., in the image on the left.

this opens a data-view of the records of both types. Click on the blue link (shown at 2.) to open the linked record.

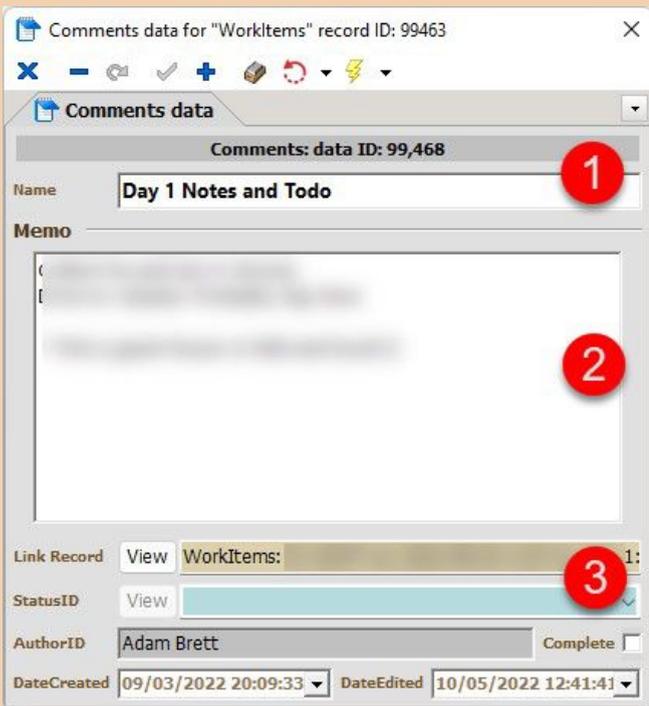


Viewing Comments and FileNotes from an Edit Form



ShortcutLinks Bar showing Comment and Image

Linked Comments, FileNotes and Images records are also shown in the **Shortcut Links Bar** (shown at 1., in the image). Click on an icon to open the linked record.



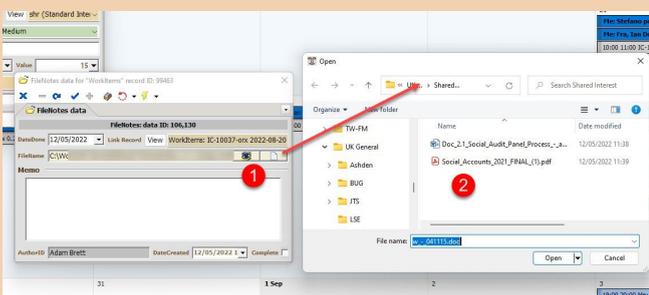
The Comments Edit Form

Comments Edit Form

1. **Name:** is used by Orixia for "short displays" of what the record contains. Can be used in Summary reports, or as a Title in reports.
2. **Memo:** a Long text (CLOB) field. This can contain as much data as the user wants to type, in plain-text format.
3. **LinkRecord:** This shows the record this comment is linked to. StatusID: This is a pick list, which usually contains items such as "Requires Action" and "General Comment".

The **Memo** field of the Comments object has some useful specialized features, including tagging and advanced search and replace.

To learn more about this look at the following link: [The Orixia "Memo" window](#)



FileNotes Edit Form

Editing File Notes data

The FileNotes data-table allows the user to link an external file to any record in an Orixia App. The FileNotes data-table includes other fields (a "Memo" for general notes, the "Author", date of creation, and any other fields added by your developer). Users can update and edit these fields as they wish.

The name of the linked file can also be updated: Click on the white "New Item" button and a file-dialog window will open allowing the user to update the file name.

The linked file can be viewed by clicking on the "eye" button

NOTE: Orixa only stores the file-name, so if the external file is deleted, changed or moved the link may change or cease to work.

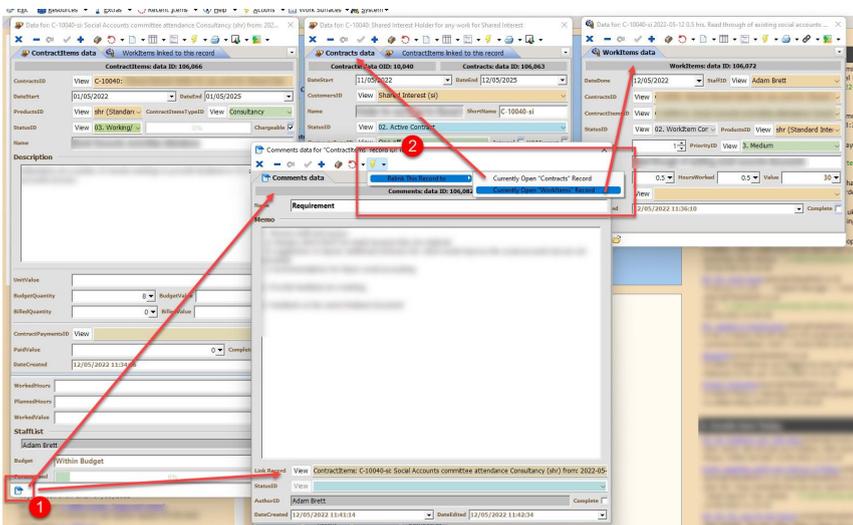
Special features of the Comments and FileNotes Edit Forms

In their basic form, before an Orixa Developer extends them in any way, the Comments and FileNotes BusinessObjects include a number of useful features. The records include "DateEdited" and "DateCreated" fields, which allow users to keep track of when data was added and edited. The records are automatically viewable from within their linked "parent" record, and include a useful "Relink" action, so that a Comment can be shifted to be linked to a new record if necessary.

A user can Relink a Comments, FilesNotes or Images record switching it's parent to a different record by taking the steps shown below.

This is extremely useful if a comment has been linked to one record accidentally and the user wants to switch it to a different record, or if a staged work process moves between two records at any point..

Relinking Records



Relinking Comments, FileNotes and Images records

1. With edit-windows open, click on the "View Comment" icon in one edit-window. The comment edit-form will open, linked to the clicked-record.
2. Click on the Comments Edit Form Actions Menu. An action "Relink this record to..." will appear. Click on this item and the system will create a list of **all currently open records which accept links to comments**. Click on one of these, and the link will update to link to the chosen record.

NOTE: You can only re-link to a "currently open" record, so before you do this make sure you have the "destination" record open.