Find, filter, and edit records

Use workspace navigation, list controls, record fields, and saved activity to verify an edit.

https://docs.qintoravacloud.com/guides/forms-and-lists/

Find the collection

Open the Agent workspace, select **Find a workspace**, and use **Workspace collections** or **Browse all destinations**. Select a specific destination such as **Incidents**. A collection list and a specialized workspace can show the same operational object from different views.

Filter and inspect

1. Start with the record number or a distinctive title. Clear existing filters if a known record is missing. Confirm the active tenant, collection, filter values, and user scope.
2. Use **Columns** to show fields relevant to your task. Selecting a list column does not edit the underlying record. Use the filter builder if available for the collection and verify the total and visible rows.
3. Open the matching row. Confirm its type and number in the record header. Inspect linked records, activity, notes, and attachments if the record supports them.

Edit and verify

1. Identify the exact field using the form reference. Pick reference records from the lookup. Choose the parent option before filling dependent selections. Copy the original value or retain an approved configuration export if your change needs rollback.
2. Apply the change in a test tenant first when it affects multiple users. Save the form or use the workflow-specific action, such as a decision, completion, or transition button.
3. Reopen the saved record. Check the new value and the record activity, then verify the related approval, linked item, event, or notification if the action is expected to produce one.
4. If save times out, search for the submitted record and inspect its activity before retrying. If another person changed the record, reload and reconcile against the latest version.

Identify the reason a field is absent

Check required and hidden flags in the form reference, then check conditional choices and record state. Compare the same record with a user who has the intended role. Review record and field ACLs, active tenant field configuration, and module enablement. Use Configuration Studio to change a registered configuration safely.