![MODAL CONNECT logo]

"Make the connection…"

ModalConnect – Create a LiNK Submission Report

April 2025

Creating a LiNK Form Submissions Report with Dates
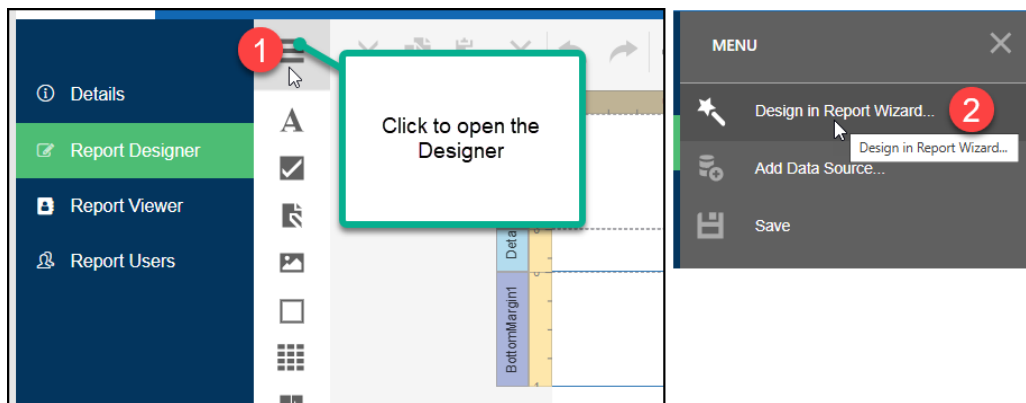
Contents

Add a Report

Open Reports – (select View from the main menu and then Reports)

From the Reports page select New and give the Report a Title (must be unique). Add a description optional. Save the Report Title.
The Report is listed at the top of the table - click on the Report title to open.
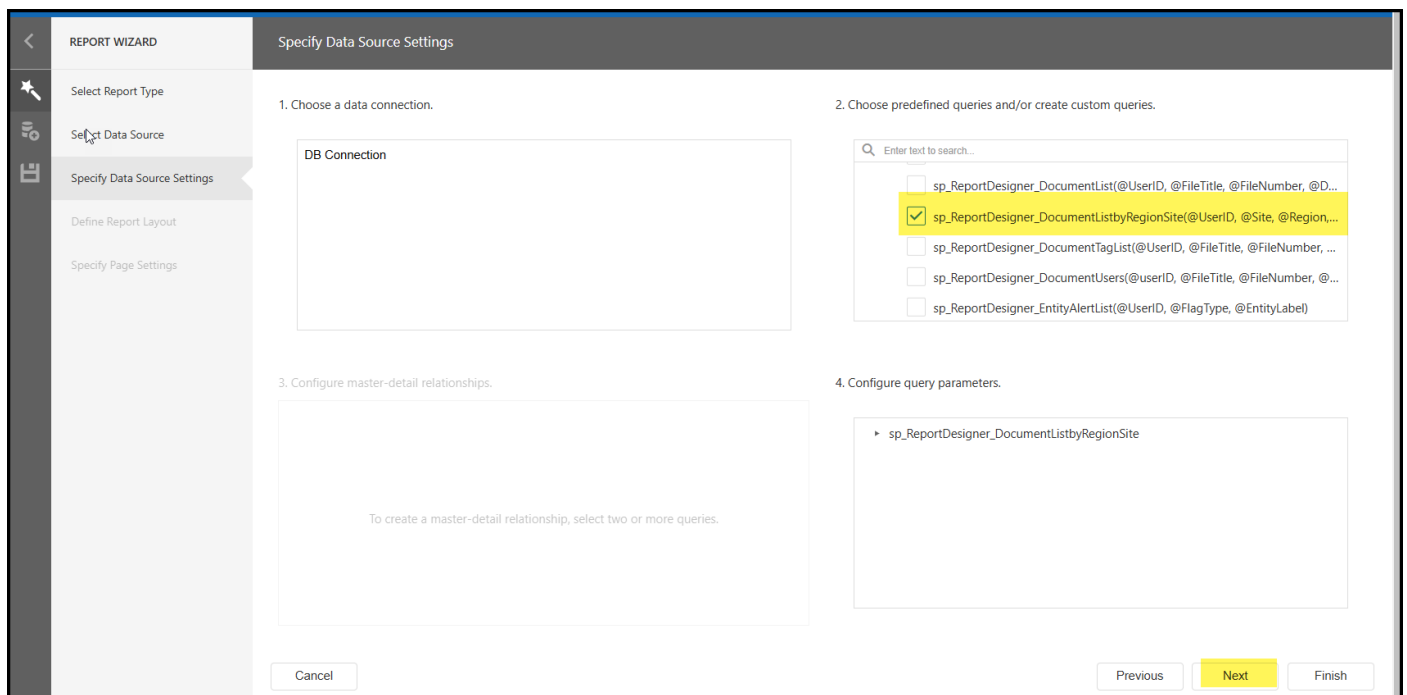
Report Designer

Select 'Report Designer' from the left menu then once a report outline loads click the top 3 bars to open the Designer menu and select 'Design in Report Wizard'

Select Report Type – Table Report is preselected so just click Next
Select Data Source – the Database is preselected so just click Next

Specify Data Source Settings – in field 2 expand 'Stored procedures' and select the query '.....DocumentListbyRegionSite.....' then click Next

Define Report Layout

Overview

1. Check the Query (in section 1) which then shows the data fields in section 2
2. In section 2, select these Data fields - Region, Site, DocumentID, Document Type, Document Number, Document Title, Document Creation date – any other field is optional – e.g Document Created By, Document owner etc.
3. In section 3 'Add group fields' , click Add group (see examples below of the finished Report layout using these options) The Group fields are used as Headers in the report with the other detail below.
   Option 1: Use a single Group and select Region and Site
   Option 2: Add 2 Groups 'Region' as a Group 1, then add 'Site' as a Group2.
4. In section 4 'Add Summary fields' – expand the query name and select 'DocumentTypeID'. In the Summary functions to the right select 'Count' This enables a Document count to occur per Region and Site.

Click Next

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Specify Page Settings:

1. The default setting is Portrait – click on Landscape to select (best option for more than 4 data fields)
2. Optional to select a colour scheme for the header bands (do this before adding a title).
3. Add a Title for the Report (can be different to the Title given when adding the Report) This is the Title that will show at the top of the printed \ exported Report
4. Click Finish

Note; Not all data fields including Groups show on the preview – they will be viewable on the Designer page after clicking Finish.

The Report opens in the Designer view with the selected data fields and layout.

Open the Designer menu and Click Save
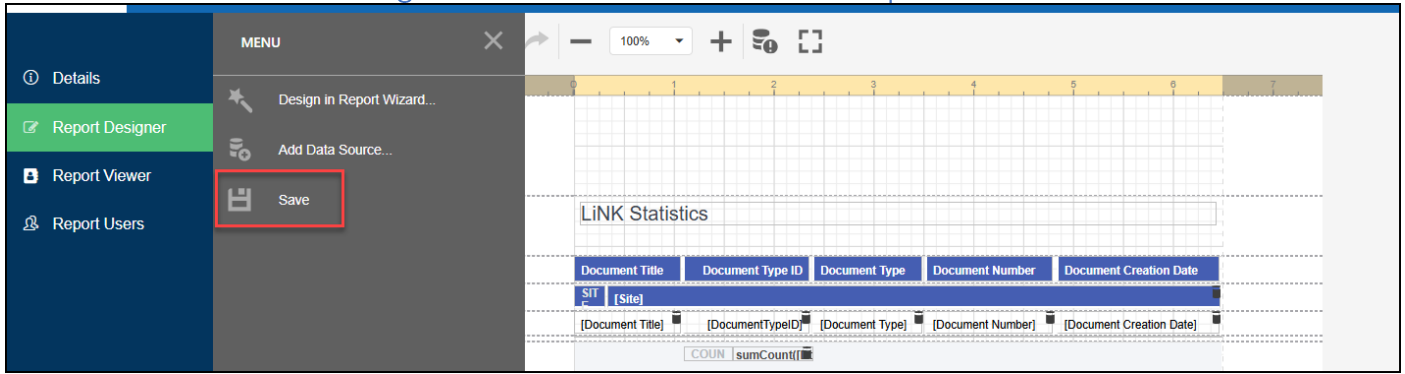
Format Report Design

Moving the Region and/or Site Group band to the upper level and repeating this to show on each page.
Where data has been added as a Group – the default format adds this between the detail band and the detail band row headings. To format this so that the Group Headings for Region and Site sit above the detail heading band, then these need to be moved up a level.

1. Click on the green outer margin of the 'Region and/or Site' header which opens this rows properties on the right
2. Check the 'Repeat Every Page' so the Region and/or Site header band shows at the top of each page. (Optional)
3. Move the Level up from 1 to 2 This moves the Group band to sit above the Detail Header (Required).

4. If the Site was added as a separate Group (e.g has 2 groups – 1 for Region and 1 for Site) repeat steps 1-3 for the Site header row.
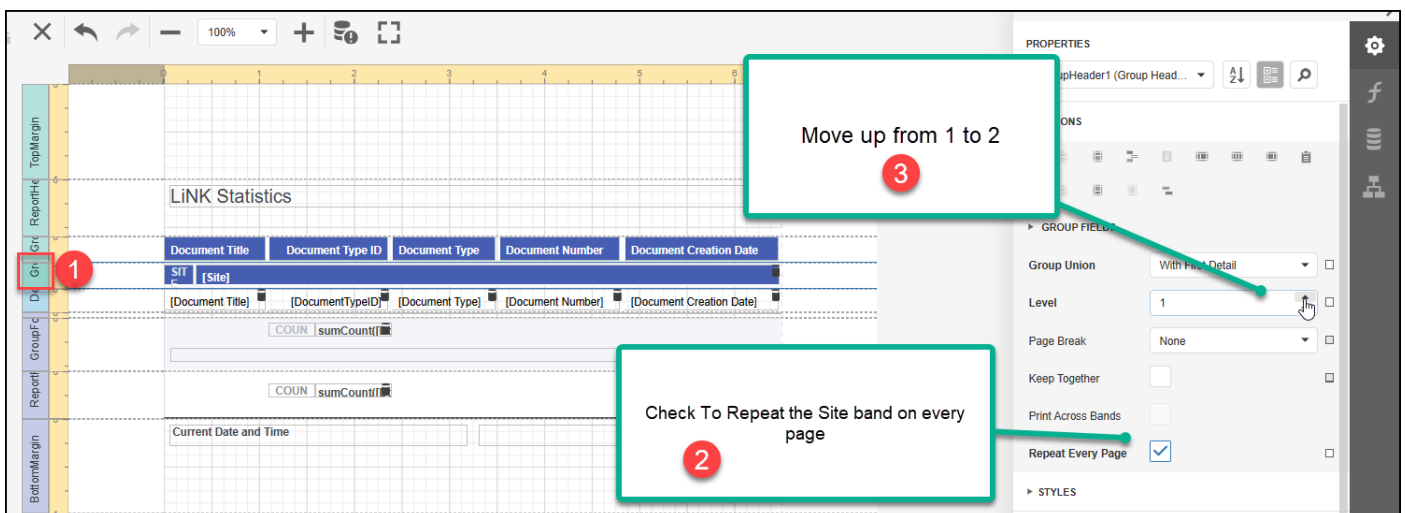
Resize data fields by dragging the cell sides – e.g extend the Document Title or Document Number whilst narrowing the Document Type. Repeat for both the data title (darker band) and the data result (in the detail band white) so it matches.
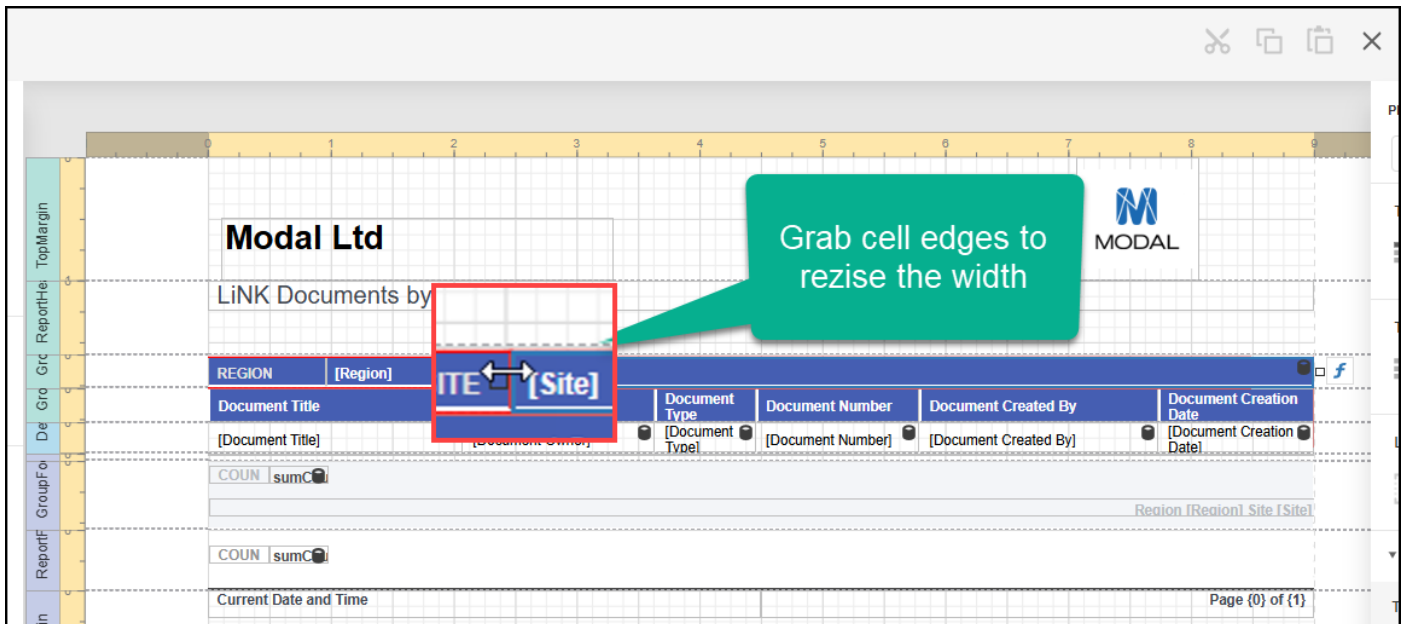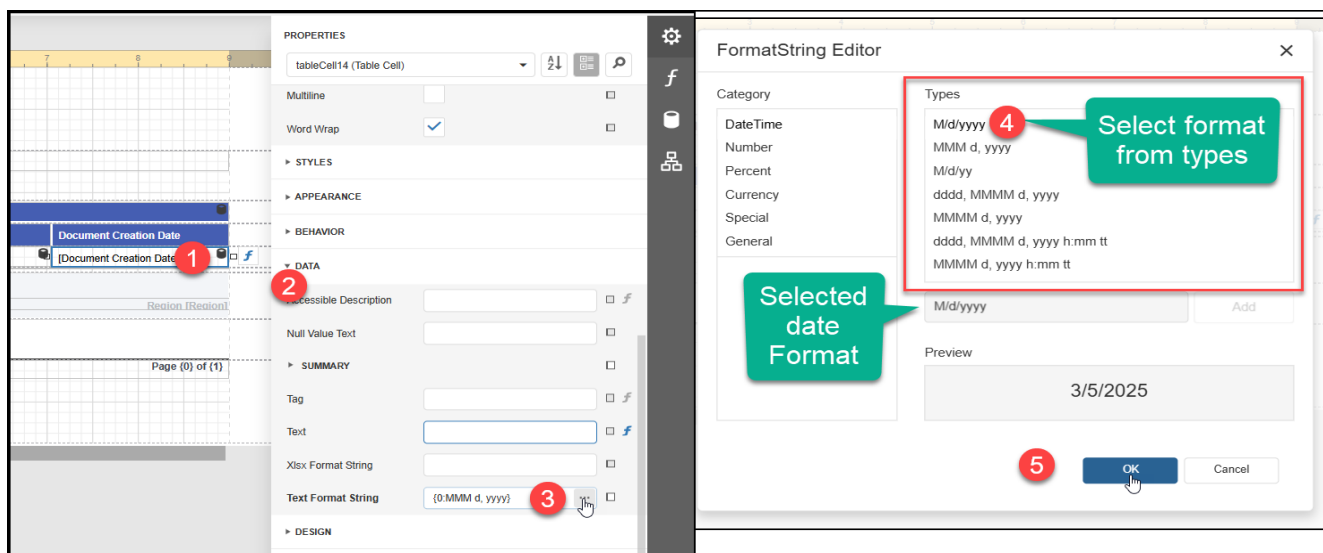

Date Format

This is the default date format

To change the date format. (optional)

1. Click into the Document Creation Date data field on the Report (has the data icon in it)
2. Expand the Data property
3. Click on the ellipsis in the 'Text Format String' field
4. In the FormatString Editor select the date format type.
5. Click OK to save

Documentid Delete the DocumentID fields in both the Detail and the detail header. The DocumentID (which has already been saved) is only required in the background to use as the Document count and provides no further benefit to show it on the Report.

Add a Logo

From the Designer's left menu select the image icon and drag up into the top blank area (Top Margin) of the Report as an image placeholder (can be placed anywhere in this band).
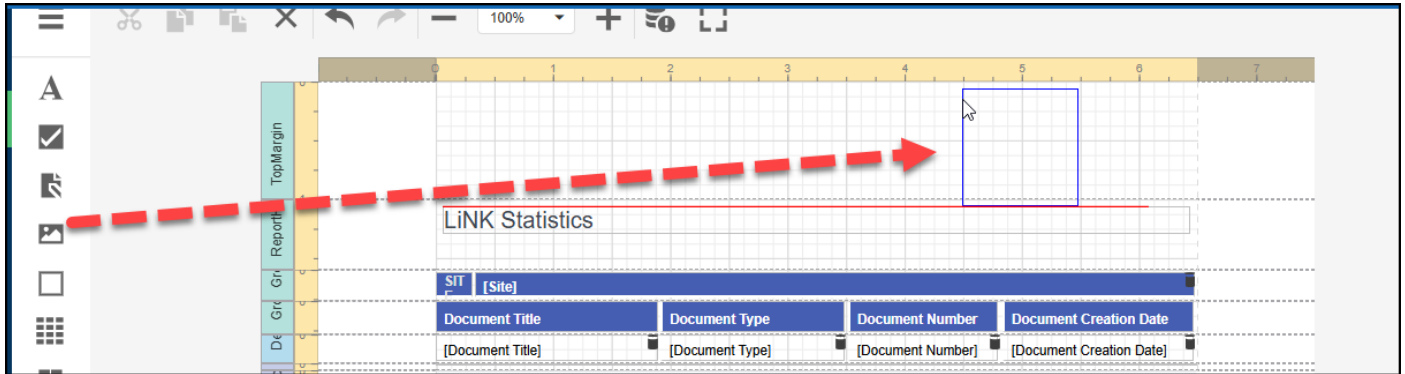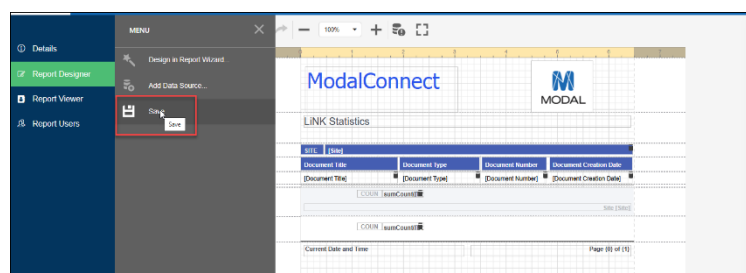

With the placeholder selected - from the Properties pane in the 'Image Source' field click on the ellpisis. This enables you to select the image from your Files (recommend a small png or jpg). Double click to select to upload the image to the Report. The image edges can also be resized (drag edge) to fit the image if required.

Add a Label

To add a label - drag the text box onto the Report header. In the Properties details you can enter the Label name. Under 'Appearance' the Font and alignment can be updated.
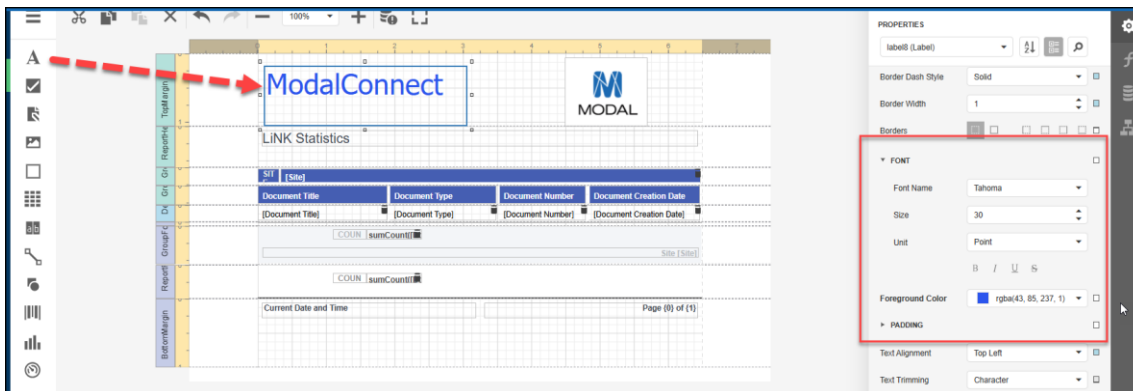
Save the Report to save all format changes

Configure Query Parameters

This is a 2 step process configuring the Query Parameters.

1. From the in the Expression Editor within the Data Source Wizard
2. Then under Parameters, configuring any Parameters to be used as Filters.

   ### Edit Query

1. From the right menu select the Fields icon
2. Expand the top line (SqlDataSource)
3. Click on the Query name and select Edit (pen icon) which opens the Data Source Wizard.
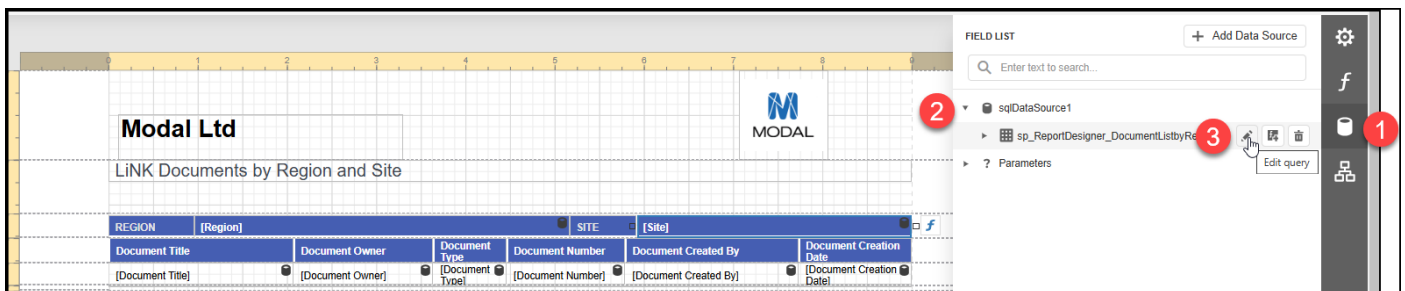
The Data Source Wizard

From The 'Data Source Wizard' just select Next (as the query is pre-selected).
Configure query parameters – This lists the data fields available as Parameters for the Report.
The userid is automatically set so requires no further configuration .

4. In the Data Source Wizard Parameters list **expand Site – Change the Type to Expression,** in the value field **click on the ellipsis.** In the **Expression Editor** enter **?Site** and click OK.

Repeat this step for the Region Parameter.

5. For the @DocumentType - Leave the Type as 'String'
6. In the Value field enter LiNK FORM (use exact text formatting)

Configure Date

1. Expand the @FromDate
2. Change the Type to Expression
3. In the Value field click on the ellipsis

4. In the Epression Editor at the top (next to the 1) enter ?FromDate
5. Click Save/OK
6. Repeat this for the To Date.

7. Click Finish in the Data Source Wizard.

Add Parameters

2 Now the Parameters have to be configured and added to use as Filters in the Report viewer.

The userid is preset so no further configuration required. Note the userid will only show from Reports pre march 2025

ADD REGION (AND/OR SITE) PARAMETER/S AS A REPORT FILTER

To enable the Report to be filtered by Region, click on ? Parameters then the + to open the Add Parameter window.

In the Add parameter window configure as follows;

1. Name = Region
2. Description = Region (free text field) This is what shows as the Filter name
3. Orientation - Horizontal
4. Type – String
5. Visible = Yes
6. Enabled = Yes
7. Check boxes – check the 'Allow null value'
8. Allow null value – there are 2 options here;
   Option 1 Check Allow Null value - (none) will show in the Value field. (Then in the Report viewer All Regions are shown in the Results by default. The Report can also be subsequently filtered by a single Region).
   Option 2; Check Allow Nul value - (none) will show in the Value field – enter 0 into the Value field to replace (none). (Then when viewed in the Report viewer to enable results, either clear the Region filter by clicking x (prior to clicking submit) to return results for all Regions – or enter in a single Region name to return results for just that Region).
9. Tag, Expression and Value Source are left as is
10. Click OK to save

Repeat the Region configuration for the Site Parameter.

ADD DATE PARAMETERS

To add the Date Parameters so these can be used to run the Report and filter results; click on ? Parameters then the +
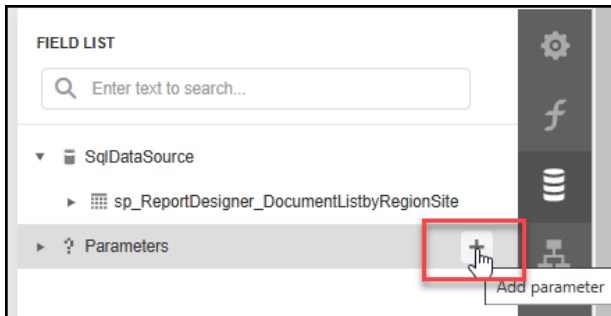
The Add Parameter window opens.

1. Name – FromDate (no spaces)
2. Description – From Date (This is what shows as the filter name in the Report viewer)
3. Type – select Date
4. Visible – Yes
5. Value – Defaults to Today – click on the Date selector and select Today. Note; this is editable in the Report Viewer where the date range can selected using the From and To Date filters.
6. Click OK

Repeat this process to add the **To Date** – again select 'Today' as the Value. This way, in the Report viewer, the date range can be selected using the From and To date filters without having to reset in the report designer in this setting. With both the From and To Dates set at the same date this also prevents the Report automatically loading unecessary results.
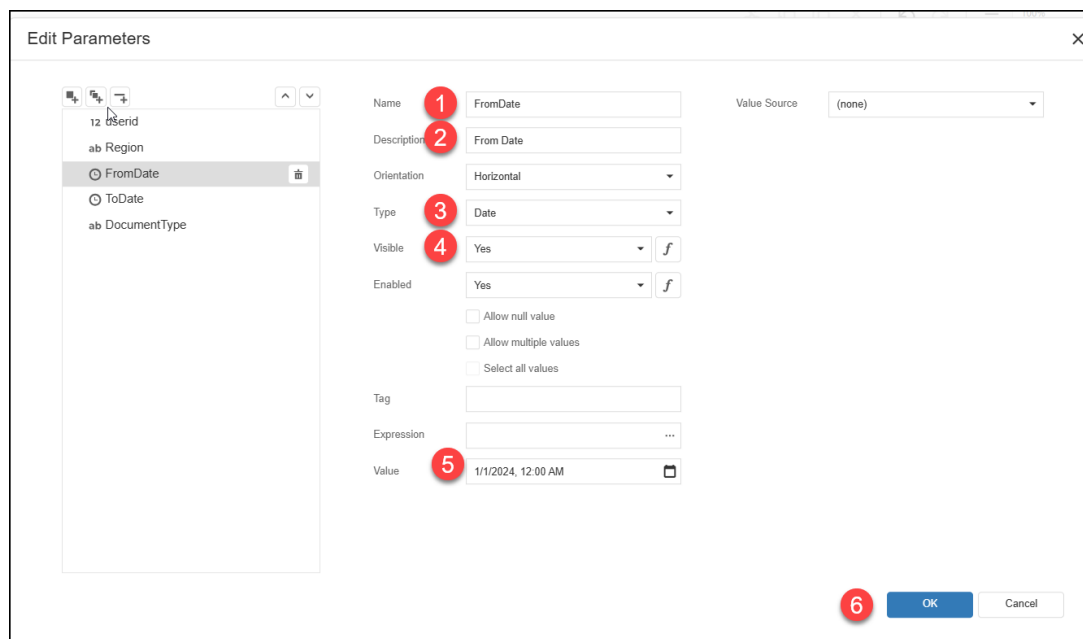
With Parameters capitation formatting applies, so ensure it matches what was set in the Expression Wizard. E.g FromDate not fromdate

Save the Report

If the preference is to not show a pre-set Date then after step 4 check to 'Allow Null Value' which places an x inside the date value @5. Click the X which will clear the date but retains the calendar function. Repeat for the ToDate

Open the Designer menu and Save the Report

Report Viewer

Select 'Report Viewer' from the left Menu. The Region, Site and Date Parameters are available as filters. Adjust the date range as required. Click Submit to load the Report for the selected dates. The Report can be run/filtered by a single Region and/or Site by entering the Region/Site name in the respective filter then click Submit.

The Site count shows at the bottom of each block. The total count for all Regions and/or Sites shows at the end of the Report

To run the Report for a single Region and/or Site, enter the Region and/or Site name and click Submit.

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