



“Make the connection...”



ModalConnect – Create a LiNK Submission Report

April 2025

Creating a LiNK Form Submissions Report with Dates

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Creating a LiNK Form Submissions Report with Dates

Add a Report

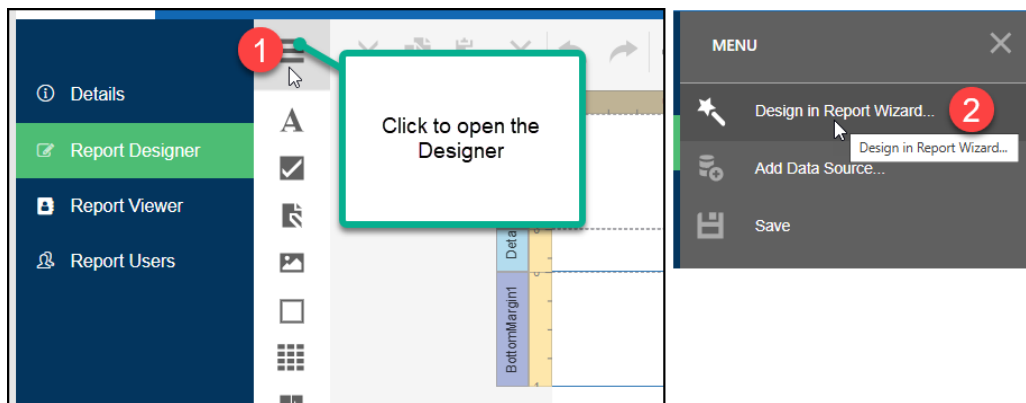
Open Reports – (select View from the main menu and then Reports)

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

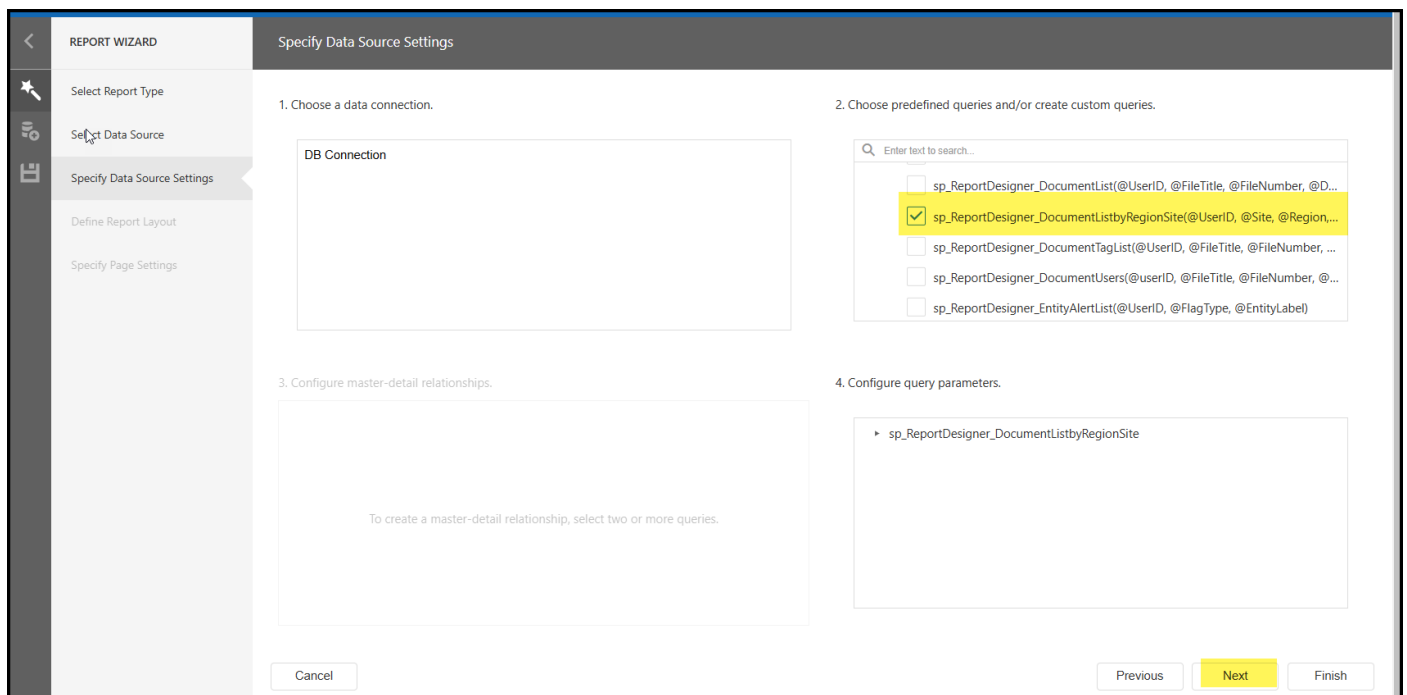
Select 'Report Designer' from the left menu then once a report outline loads click the top 3 bars to open the Designer menu and select 'Design in Report Wizard'



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



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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.

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Submission Documents by Region

Region and Site show on different headers

REGION	Auckland				
SITE	Auckland				
Document Title	Document Owner	Document Type	Document Number	Document Created By	Document Creation Date
Processed On form	Matthew Eade	LINK FORM	202308020	matthew.eade@modalmod.com	9/18/2023
Test LINK document	Richard Blair	LINK FORM	202308027	richard.blair@modalmod.com	9/18/2023
LINK Draft 11	Matthew Eade	LINK FORM	202308030	matthew.eade@modalmod.com	9/18/2023
COUNT	3	Document count for Region			
COUNT	3	Document count for Site			
REGION	Bay of Plenty				
SITE	none				
Document Title	Document Owner	Document Type	Document Number	Document Created By	Document Creation Date
State of Emergency declared	James Pearson	LINK FORM	202308040	james@brigitte.co.nz	9/28/2023
COUNT	1	Region Bay of Plenty			
COUNT	1	Site none			

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Submissions by Region and Site

Region and Site show on same header

REGION	Auckland	SITE	Auckland		
Document Title	Document Owner	Document Type	Document Number	Document Created By	Document Creation Date
Processed On form	Matthew Eade	LINK FORM	202308020	matthew.eade@modalmod.com	9/18/2023
Test LINK document	Richard Blair	LINK FORM	202308027	richard.blair@modalmod.com	9/18/2023
LINK Draft 11	Matthew Eade	LINK FORM	202308030	matthew.eade@modalmod.com	9/18/2023
COUNT	3	Document count for Region and Site			
REGION	Auckland	SITE	Wellington		
Document Title	Document Owner	Document Type	Document Number	Document Created By	Document Creation Date
Report re-submission	James Pearson	LINK FORM	202308050	james.pearson@modalmod.com	9/28/2023
COUNT	1	Region Auckland Site Wellington			
REGION	Bay of Plenty	SITE	none		
Document Title	Document Owner	Document Type	Document Number	Document Created By	Document Creation Date
State of Emergency declared	James Pearson	LINK FORM	202308040	james@brigitte.co.nz	9/28/2023
COUNT	1	Region Bay of Plenty Site none			

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Click Next

Creating a LiNK Form Submissions Report with Dates

Specify Page Settings:

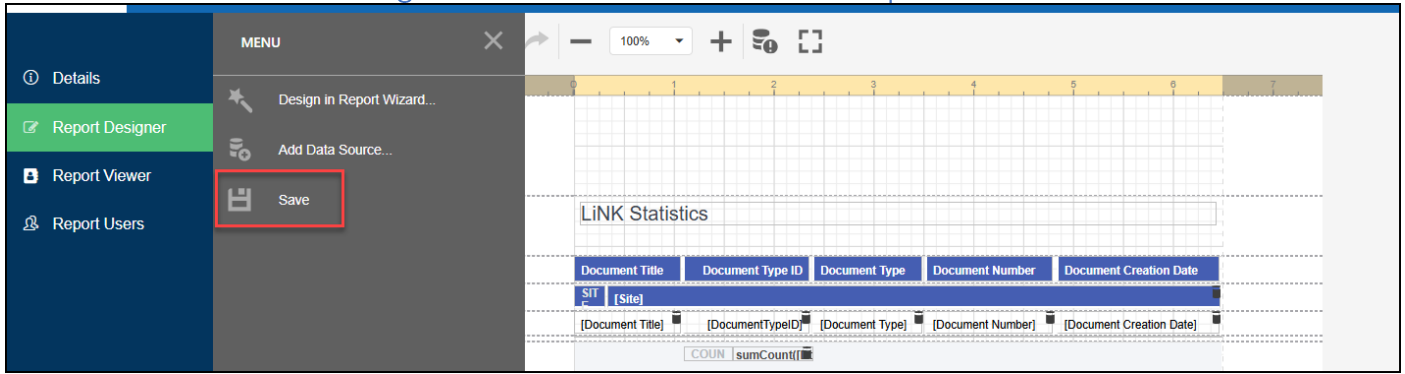
1. The default setting is Portrait – click on Landscape to select (best option for more than 4 data fields)
2. Optional to select a colour scheme for the header bands (do this before adding a title).
3. Add a Title for the Report (can be different to the Title given when adding the Report) This is the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

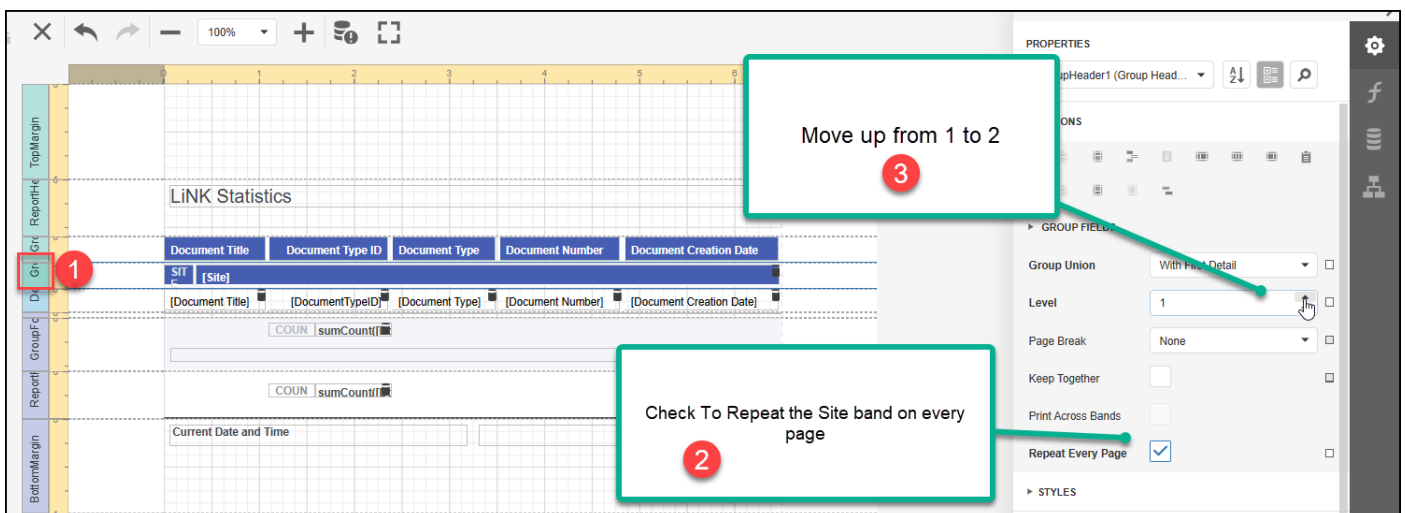
Creating a LiNK Form Submissions Report with Dates



Format Report Design

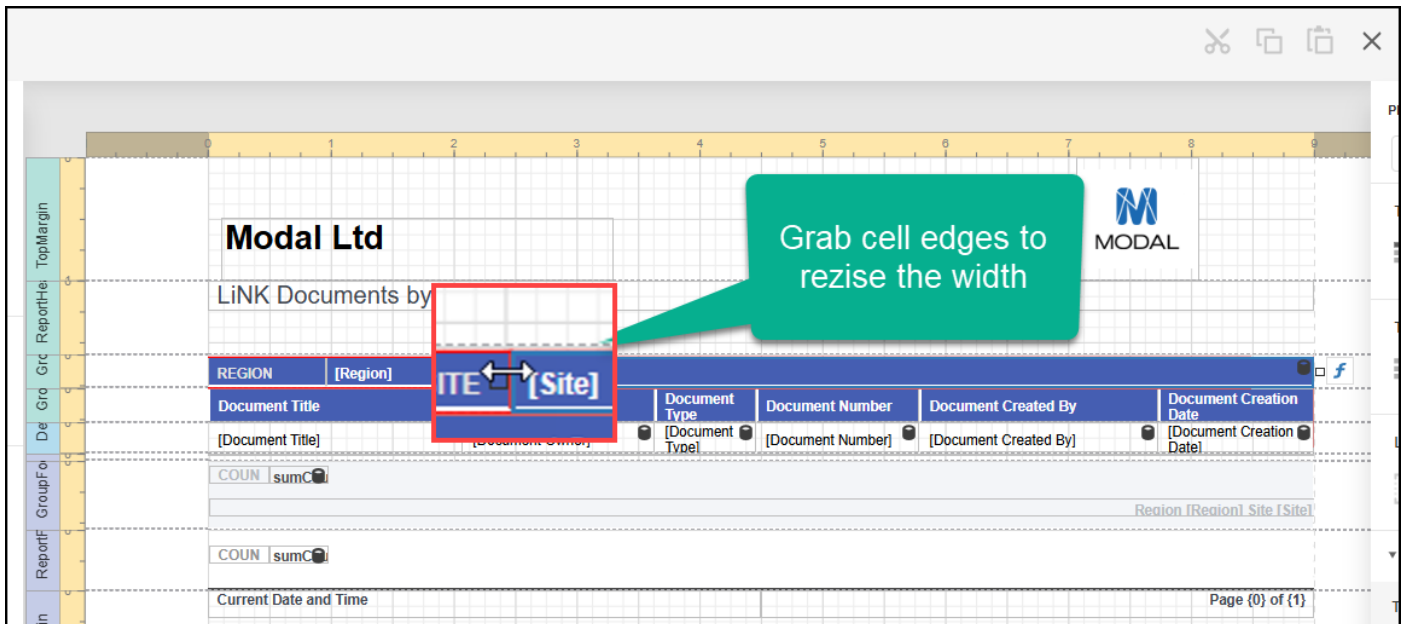
Moving the Region and/or Site Group band to the upper level and repeating this to show on each page. Where data has been added as a Group – the default format adds this between the detail band and the detail band row headings. To format this so that the Group Headings for Region and Site sit above the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



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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.



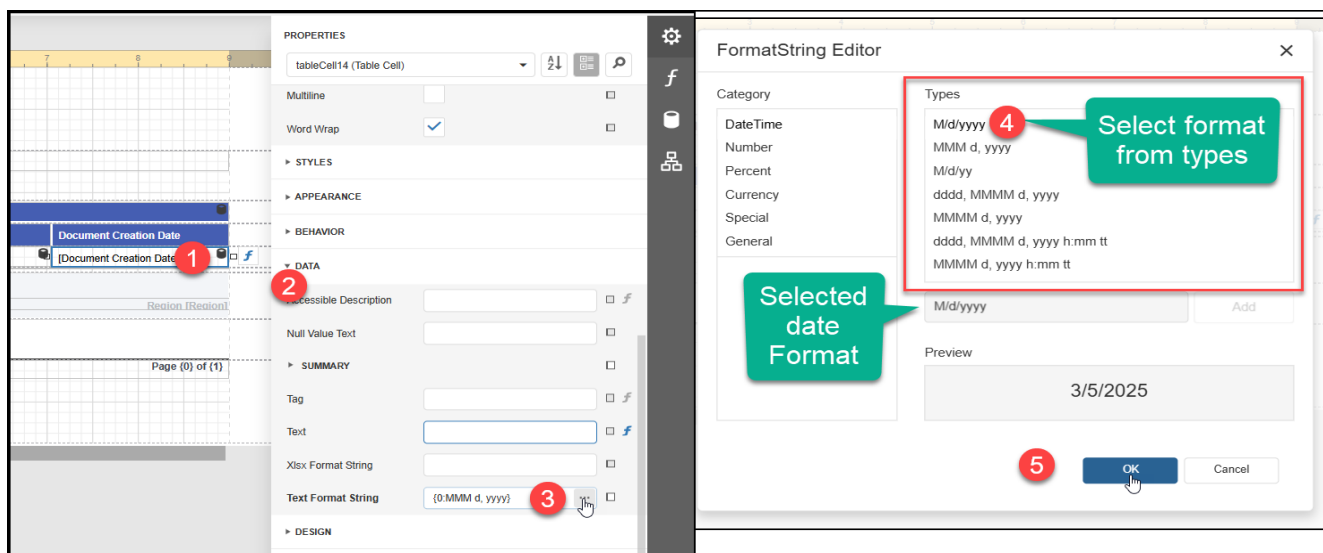
Date Format

6/25/2024 9:02:34 PM +00:00
5/2/2024 3:19:23 AM +00:00

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

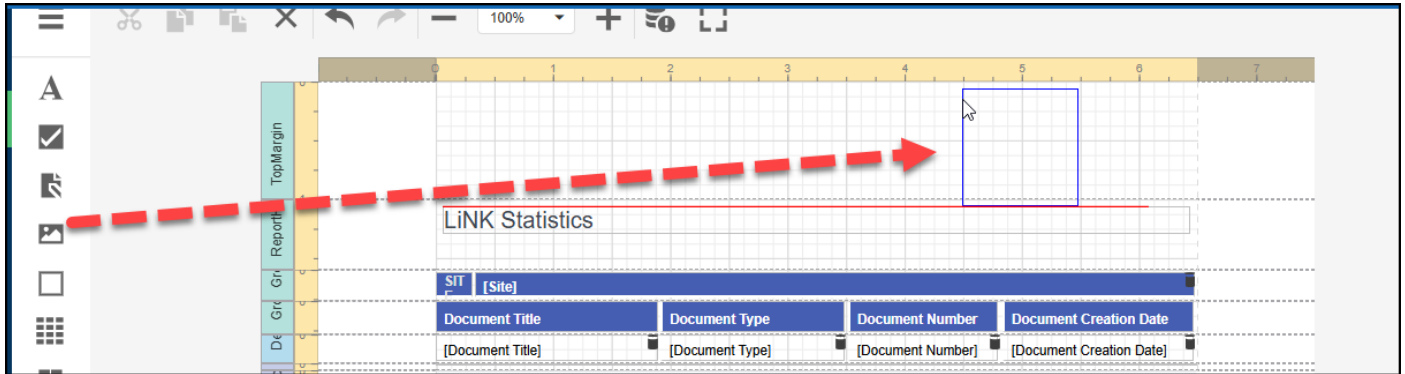


Creating a LiNK Form Submissions Report with Dates

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

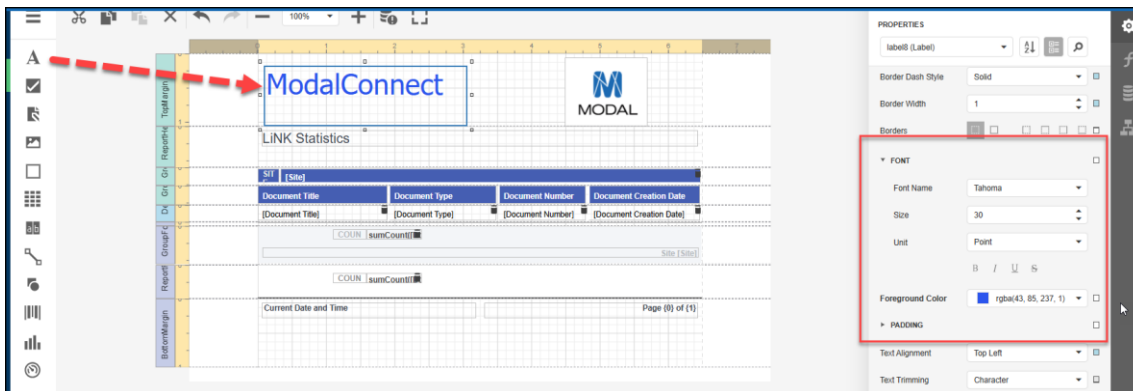
From the Designer's left menu select the image icon and drag up into the top blank area (Top Margin) of the Report as an image placeholder (can be placed anywhere in this band).



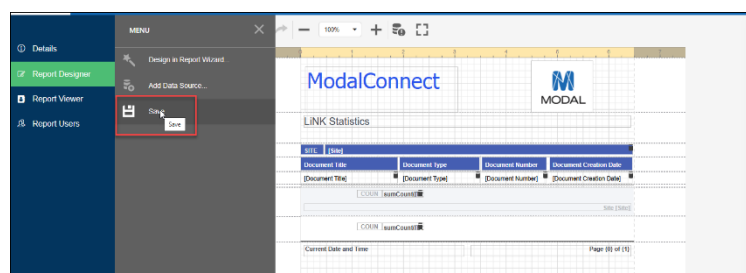
With the placeholder selected - from the Properties pane in the 'Image Source' field click on the ellipsis. This enables you to select the image from your Files (recommend a small png or jpg). Double click to select to upload the image to the Report. The image edges can also be resized (drag edge) to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



Creating a LiNK Form Submissions Report with Dates

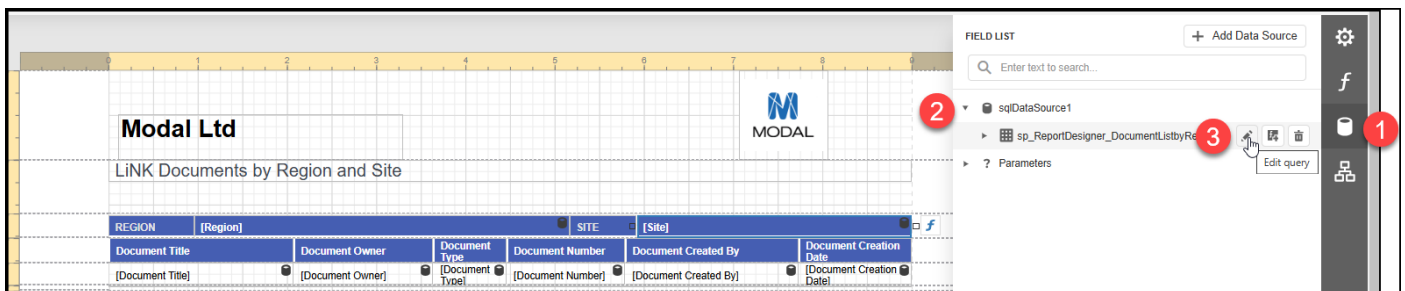
Configure Query Parameters

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 .

Data Source Wizard
Create a query or select a stored procedure.

Query Name:

☐ Query ☒ Stored Procedure

Select a stored procedure:

sp_ReportDesigner_DocumentAssociationList(@UserID, @FileTitle, @FileNumber, @DocTitle, @DocType)
sp_ReportDesigner_DocumentAttachments(@UserID, @FileTitle, @FileNumber, @DocTitle, @DocNumber)
sp_ReportDesigner_DocumentEntitiesList(@UserID, @FileTitle, @FileNumber, @DocTitle, @DocNumber)
sp_ReportDesigner_DocumentList(@UserID, @FileTitle, @FileNumber, @DocTitle, @DocNumber, @DocType)
sp_ReportDesigner_DocumentListbyRegionSite(@UserID, @Site, @Region, @DocumentType, @ProvidedBy, @FromDate)

Data Source Wizard
Configure query parameters.

Creating a LiNK Form Submissions Report with Dates

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.

The image shows two screenshots from a software interface. The left screenshot is the 'Data Source Wizard' window, titled 'Configure query parameters.' It shows a list of parameters. The '@Site' parameter is expanded, showing its configuration: Name is '@Site', Type is 'Expression', Result Type is 'System.String', and the Value field has an ellipsis button. A green arrow points to the ellipsis with the text 'Double click on Ellipsis'. Another green arrow points to the 'Type' dropdown with the text 'Expand Site - change Type to Expression'. The right screenshot is the 'Expression Editor' window, titled 'Enter text to search...'. It shows a list of fields on the left and a search area on the right. The search area contains '? Site'. A green arrow points to the search area with the text 'Enter ?Site'. Both windows have 'Cancel', 'Previous', 'Next', and 'Finish' buttons.

Repeat this step for the Region Parameter.

The image shows two screenshots of the 'Data Source Wizard' window. The left screenshot shows the '@Region' parameter expanded, with its Name set to '@Region', Type set to 'Expression', Result Type set to 'System.String', and Value set to '?Region'. The right screenshot shows the '@Site' parameter expanded, with its Name set to '@Site', Type set to 'Expression', Result Type set to 'System.String', and Value set to '?Site'. Both windows have 'Cancel', 'Previous', 'Next', and 'Finish' buttons.

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

The image shows a screenshot of the 'Data Source Wizard' window. The '@DocumentType' parameter is expanded, showing its configuration: Name is '@DocumentType', Type is 'String', and Value is 'LiNK FORM'. The window also shows the '@Region' and '@ProvidedBy' parameters. It has 'Cancel', 'Previous', 'Next', and 'Finish' buttons.

Creating a LiNK Form Submissions Report with Dates

Configure Date

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

The screenshot shows the 'Data Source Wizard' window with the title 'Configure query parameters.' The left sidebar shows a tree view with '@ProvidedBy' and '@FromDate'. The '@FromDate' item is expanded, and a red circle with the number '1' is next to it. The main area shows the configuration for '@FromDate':

Name	@FromDate
Type	Expression
Result Type	System.Object
Value	

A red circle with the number '2' is next to the 'Type' dropdown, and a red circle with the number '3' is next to the 'Value' field, which has an ellipsis button next to it.

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

The first screenshot shows the 'Expression Editor' window with the title 'Expression Editor'. The text area contains '?FromDate' and a red circle with the number '1' is next to it. The bottom right has 'Save' and 'Cancel' buttons, with a red circle with the number '2' next to the 'Save' button.

The second screenshot shows the 'Expression Editor' window with the title 'Expression Editor'. The text area contains '?ToDate' and a red circle with the number '1' is next to it. The bottom right has 'Save' and 'Cancel' buttons, with a red circle with the number '2' next to the 'Save' button.

7. Click Finish in the Data Source Wizard.

Creating a LiNK Form Submissions Report with Dates

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

The image displays two side-by-side screenshots of the 'Add Parameter' configuration window for a parameter named 'Region'. Both windows have the same settings for Name, Description, Orientation, Type, Visible, Enabled, and Value Source. The key difference is in the 'Allow null value' options and the resulting 'Value' field.

Option 1 (Left Screenshot): The 'Allow null value' checkbox is checked. The 'Value' field at the bottom contains the text '(none)'. A red callout box with an arrow points to this field, containing the text 'Value shows as (none)'.

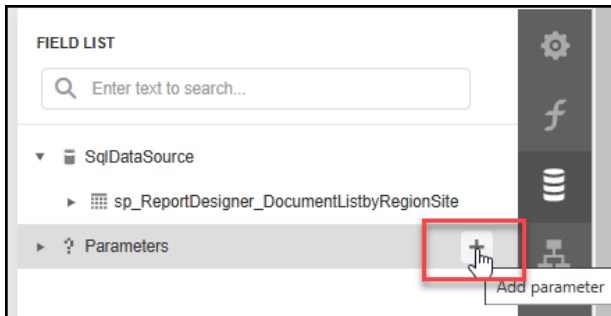
Option 2 (Right Screenshot): The 'Allow null value' checkbox is checked. The 'Value' field at the bottom contains the number '0'. A red callout box with an arrow points to this field, containing the text 'Parameter value is 0'.

Repeat the Region configuration for the Site Parameter.

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ADD DATE PARAMETERS

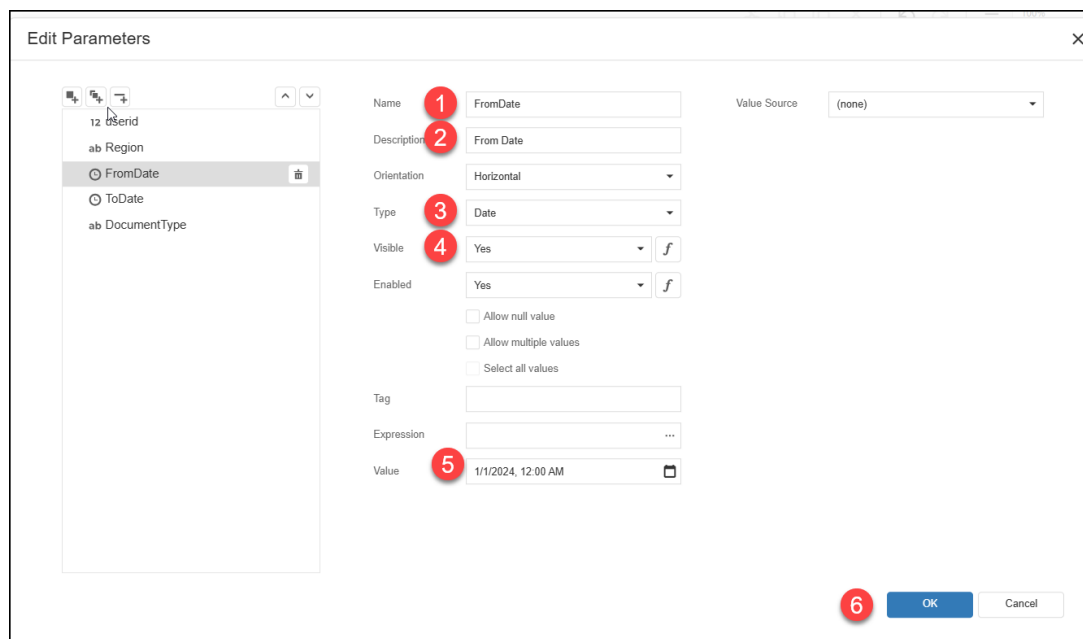
To add the Date Parameters so these can be used to run the Report and filter results; click on ? Parameters then the +



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 be 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 unnecessary 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

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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 screenshot shows the 'Report Viewer' interface. On the left is a navigation menu with 'Details', 'Report Designer', 'Report Viewer' (selected), and 'Report Users'. The main area displays the 'Submissions Report' with a table showing counts for Region and Site. A green callout box with a speech bubble icon says: 'Adjust dates as required Click Submit to run the Report.' On the right, the 'PREVIEW PARAMETERS' section shows 'From Date' and 'To Date' both set to '3/6/2025, 12:00 AM', and 'Region' and 'Site' both set to '(none)'. There are 'RESET' and 'SUBMIT' buttons below the parameters.

REGION	SITE	Submitted date	Document Title	Document Number	Document Type	Document Creation Date
COUNT		0				
COUNT		0				
COUNT		0				

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

The screenshot shows the 'Report Viewer' interface with the 'Submissions Report' table. The table is filtered by Region: Auckland, Site: Wellington. It shows one submission: 'Report is invasion' on 03/13/24 with document number 2024060031. Below this, the table is filtered by Region: Bay of Plenty, Site: none, showing one submission: 'State of Emergency declared' on 06/25/24 with document number 2024080040. At the bottom, the table is filtered by Region: none, Site: Wellington, showing two submissions: 'New Document' on 10/09/24 and 'OctoberLink Test' on 10/09/24. A green callout box with a speech bubble icon says: 'Leave Region and Site filters at (none) to return all Region/Site results for the selected dates.' The 'PREVIEW PARAMETERS' section on the right shows 'From Date' as '1/1/2024, 12:00 AM' and 'To Date' as '3/6/2025, 12:00 AM', with 'Region' and 'Site' set to '(none)'. There are 'RESET' and 'SUBMIT' buttons.

REGION	SITE	Submitted date	Document Title	Document Number	Document Type	Document Creation Date
Auckland	Wellington	03/13/24	Report is invasion	2024060031	LINK FORM	June 2024
Bay of Plenty	none	06/25/24	State of Emergency declared	2024080040	LINK FORM	June 2024
none	Wellington	10/09/24	New Document	2024100011	LINK FORM	October 2024
none	Wellington	10/09/24	OctoberLink Test	2024100010	LINK FORM	October 2024

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

The screenshot shows the 'Report Viewer' interface with the 'Submissions Report' table. The table is filtered by Region: Wellington, Site: Wellington. It shows one submission: 'iDtest for SE' on 05/01/24 with document number 2024020002. Below this, the table is filtered by Region: Wellington, Site: Wellington, showing one submission: 'Link submitted 19 July24' on 07/19/24 with document number 2024080003. A green callout box with a speech bubble icon says: 'To view results for a single Region and/or Site, Enter the (single) Region and/or Site then Submit to run the Report'. The 'PREVIEW PARAMETERS' section on the right shows 'From Date' as '1/1/2024, 12:00 AM' and 'To Date' as '3/6/2025, 12:00 AM', with 'Region' and 'Site' set to 'Wellington'. There are 'RESET' and 'SUBMIT' buttons.

REGION	SITE	Submitted date	Document Title	Document Number	Document Type	Document Creation Date
Wellington	Wellington	05/01/24	iDtest for SE	2024020002	LINK FORM	August 2024
Wellington	Wellington	07/19/24	Link submitted 19 July24	2024080003	LINK FORM	August 2024