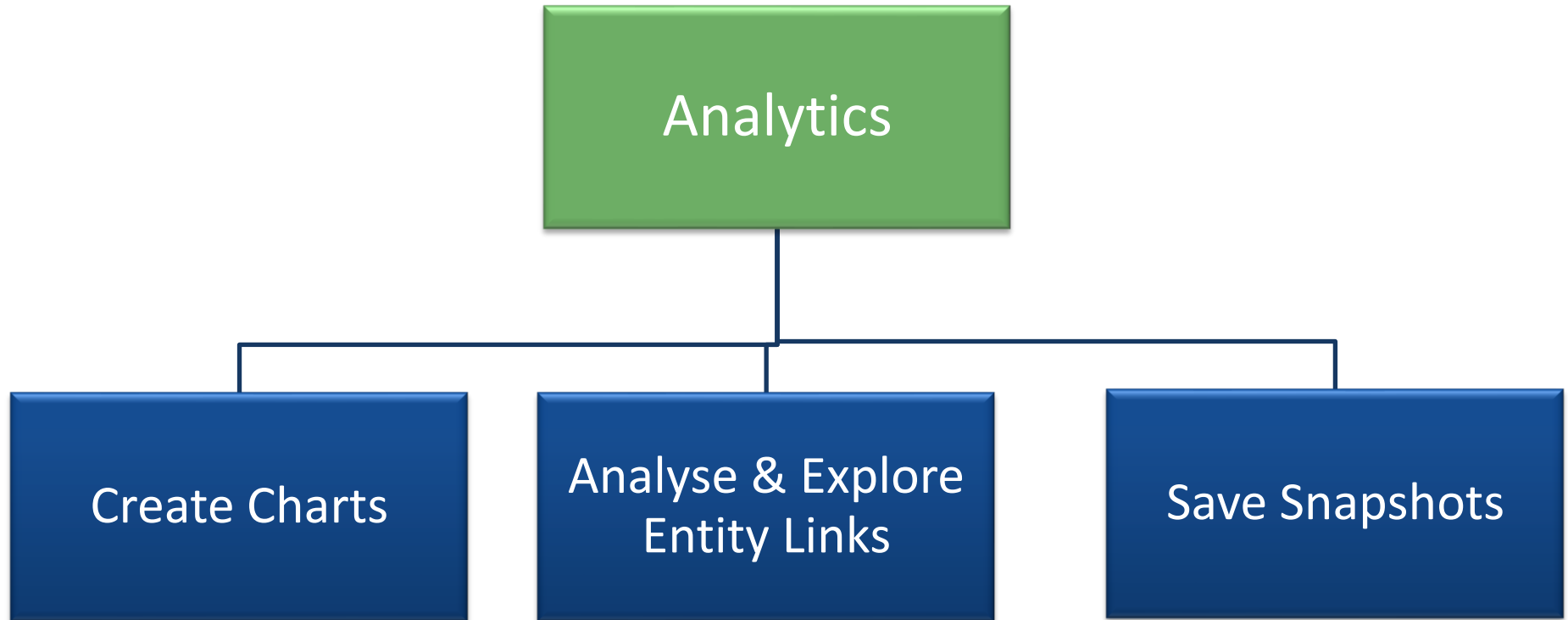




ModalConnect User Training

Analytic Charts

Make the Connection





There are 3 ways to access Analytic Charts

View Links Chart from a Document

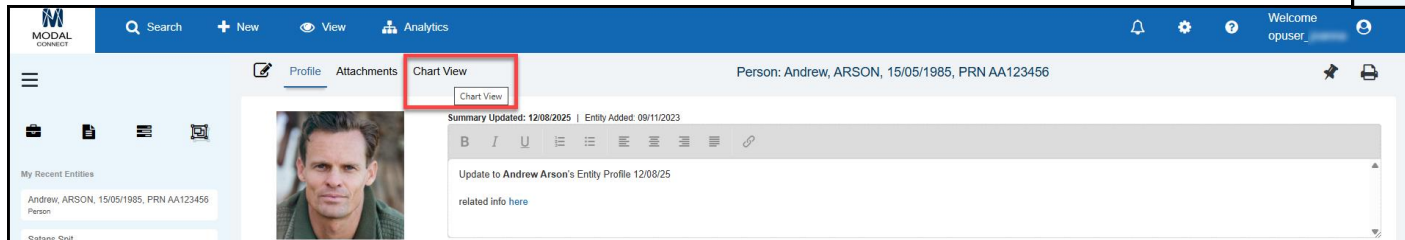
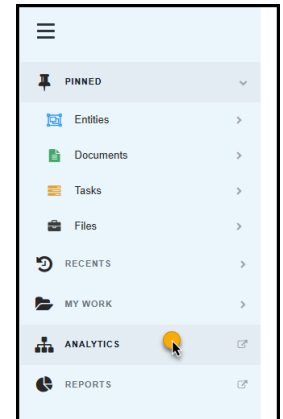
View Links Chart from the Entity Profile

Open Analytics to create a Chart

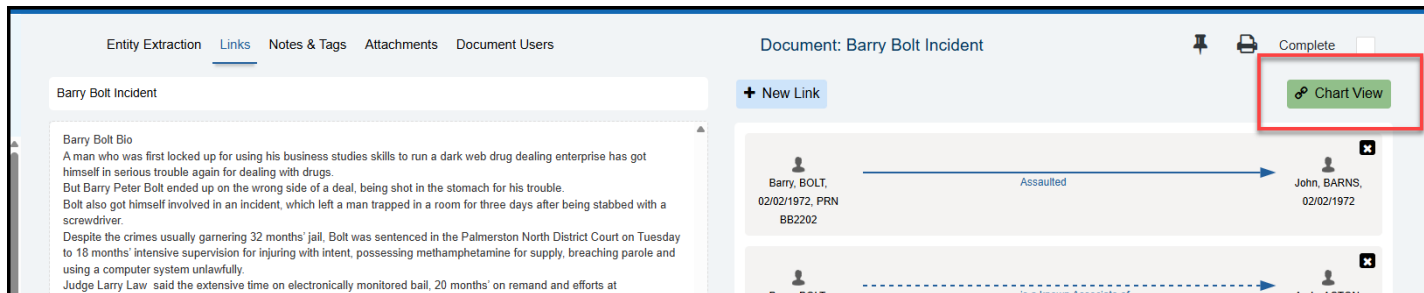


There are three ways to access Analytics to create and view Charts.

1. From the Workspace menu select Analytics which opens Analytics in a new tab. Search for an Entity to create a chart.
2. From an Entity Profile select Chart View from the menu

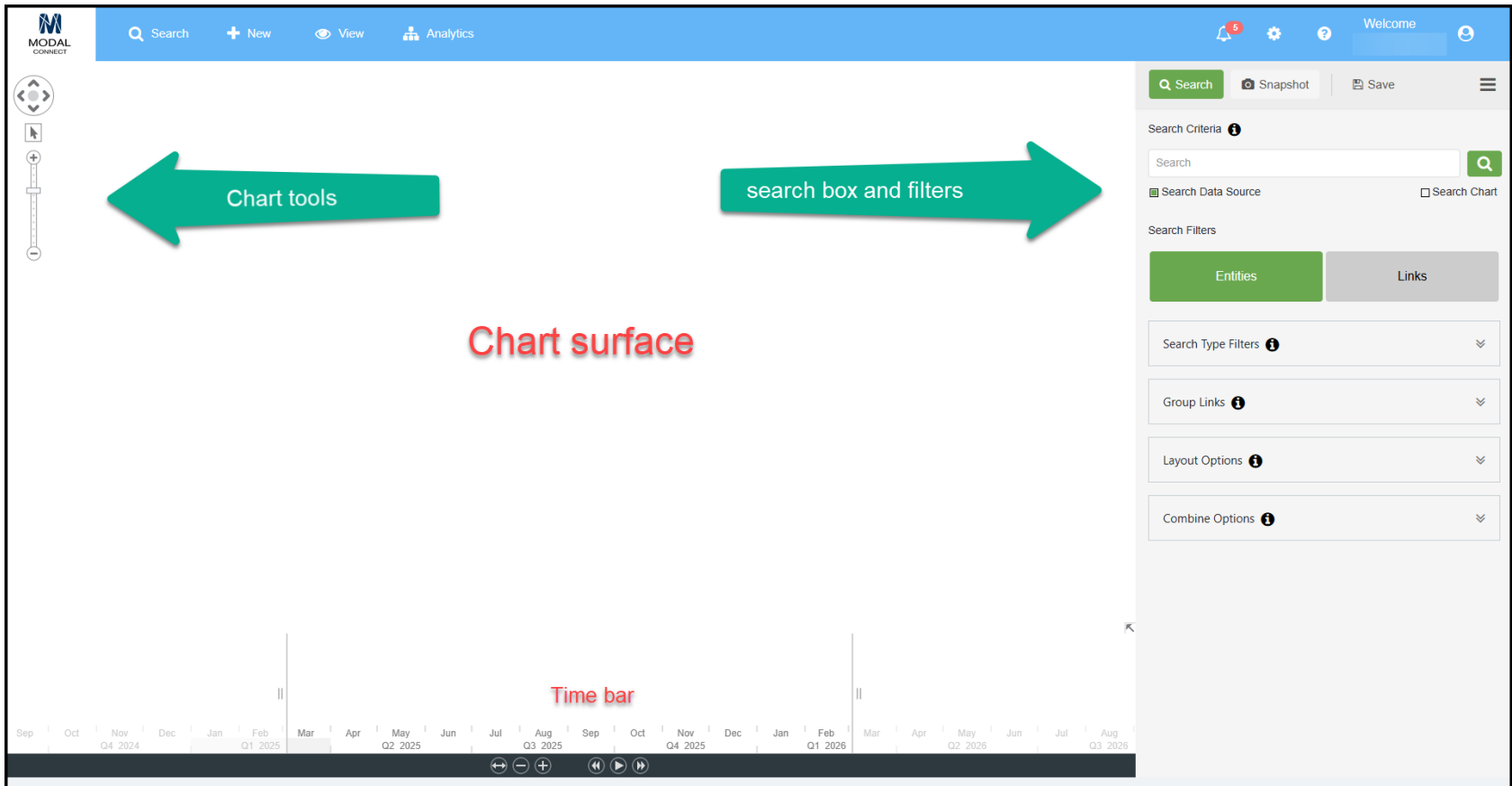


3. From a Document Links page select Chart View





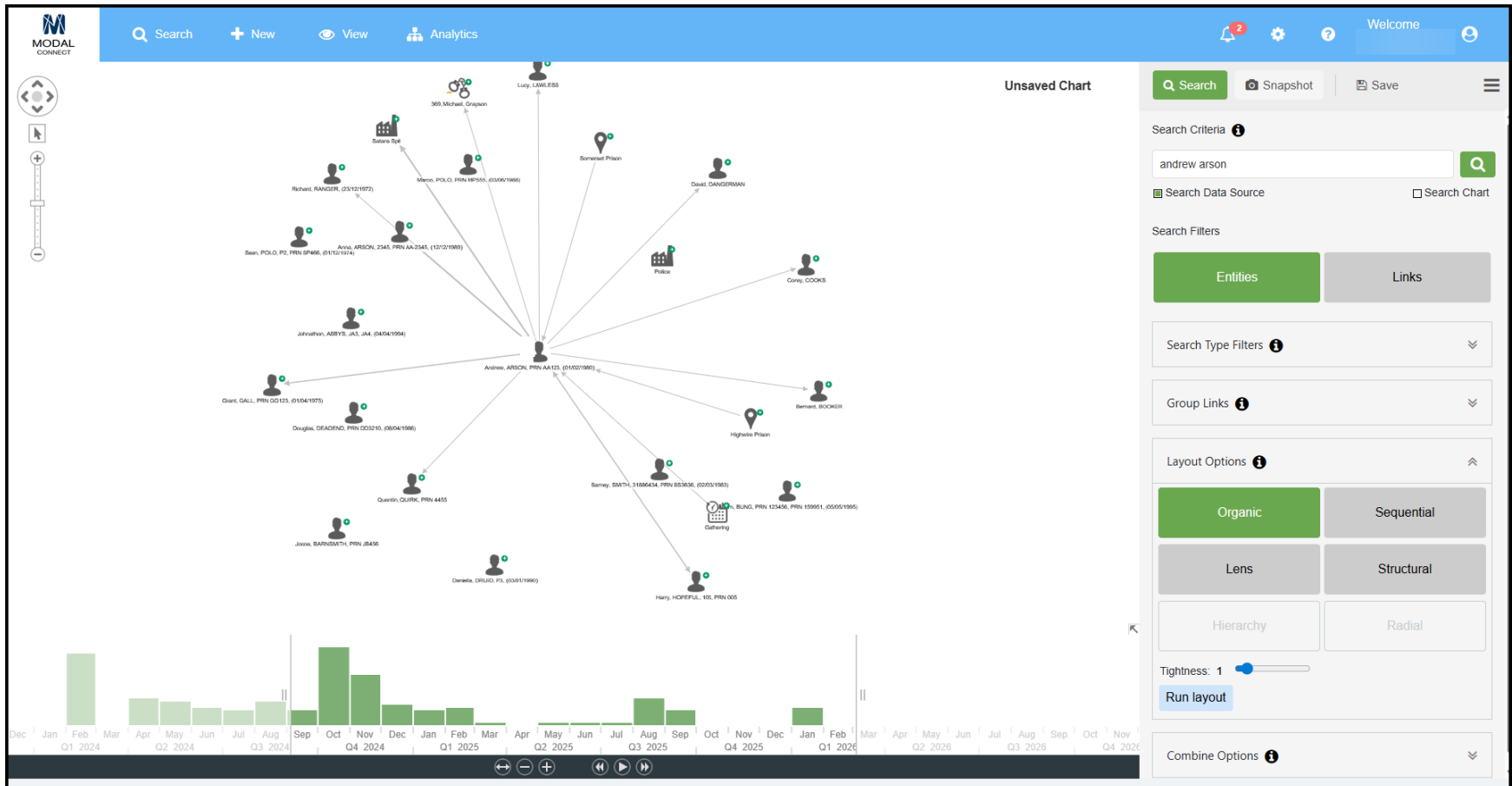
The Analytics page has a Search menu and filters on the right.
The central Chart surface area with the Chart tools on the left.
A time-bar runs along the bottom of the chart



Create a Chart

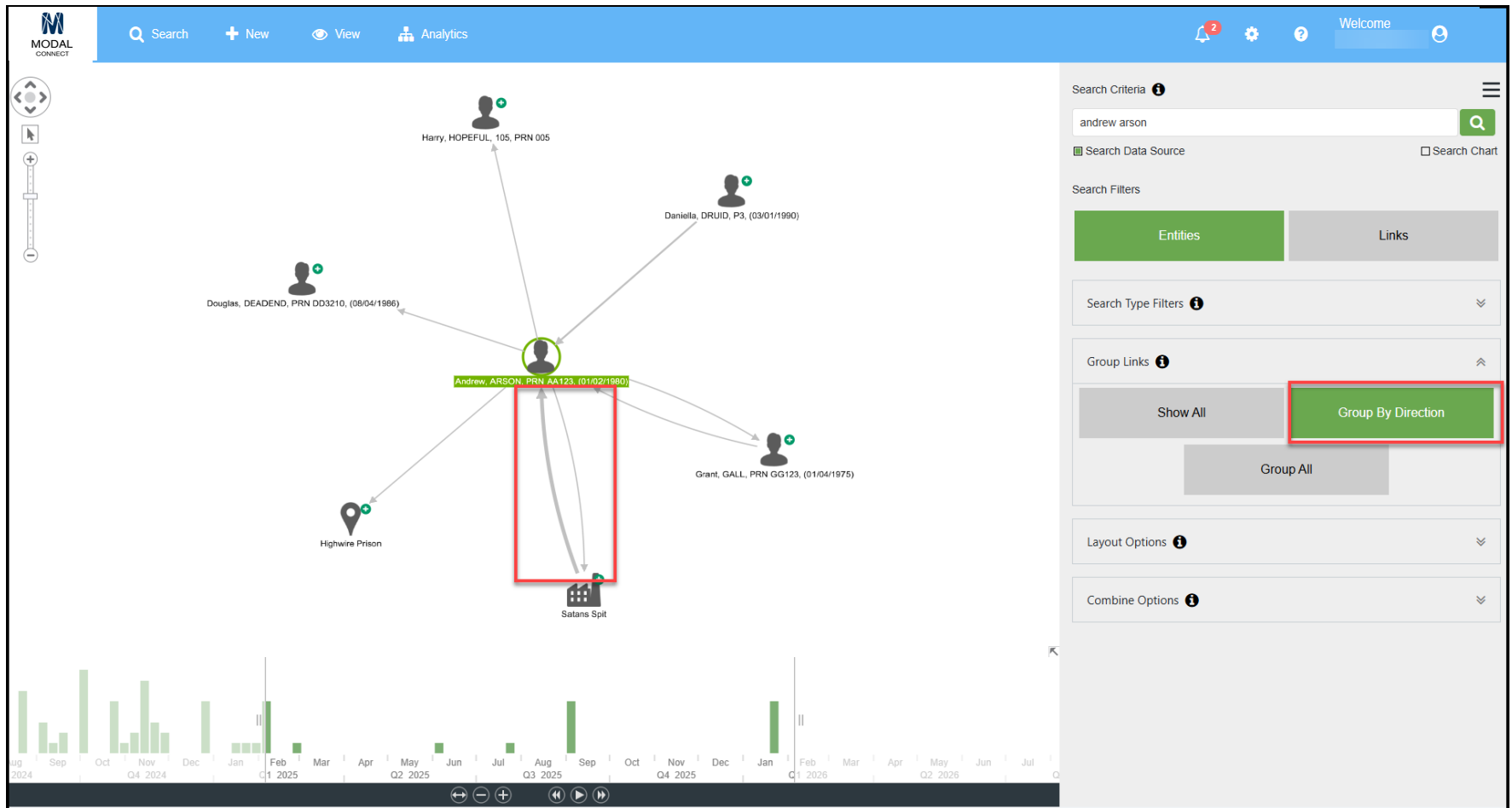


1. To create a Chart, open Analytics and enter the Entity's name or ID property in the search box.
2. Separate search terms by a space. Search terms are not case sensitive, click i to view search tips.
3. Click the Search button or Enter from a keyboard
2. To filter results by Entity type – click into the Search Types filter to modify the list then click OK.



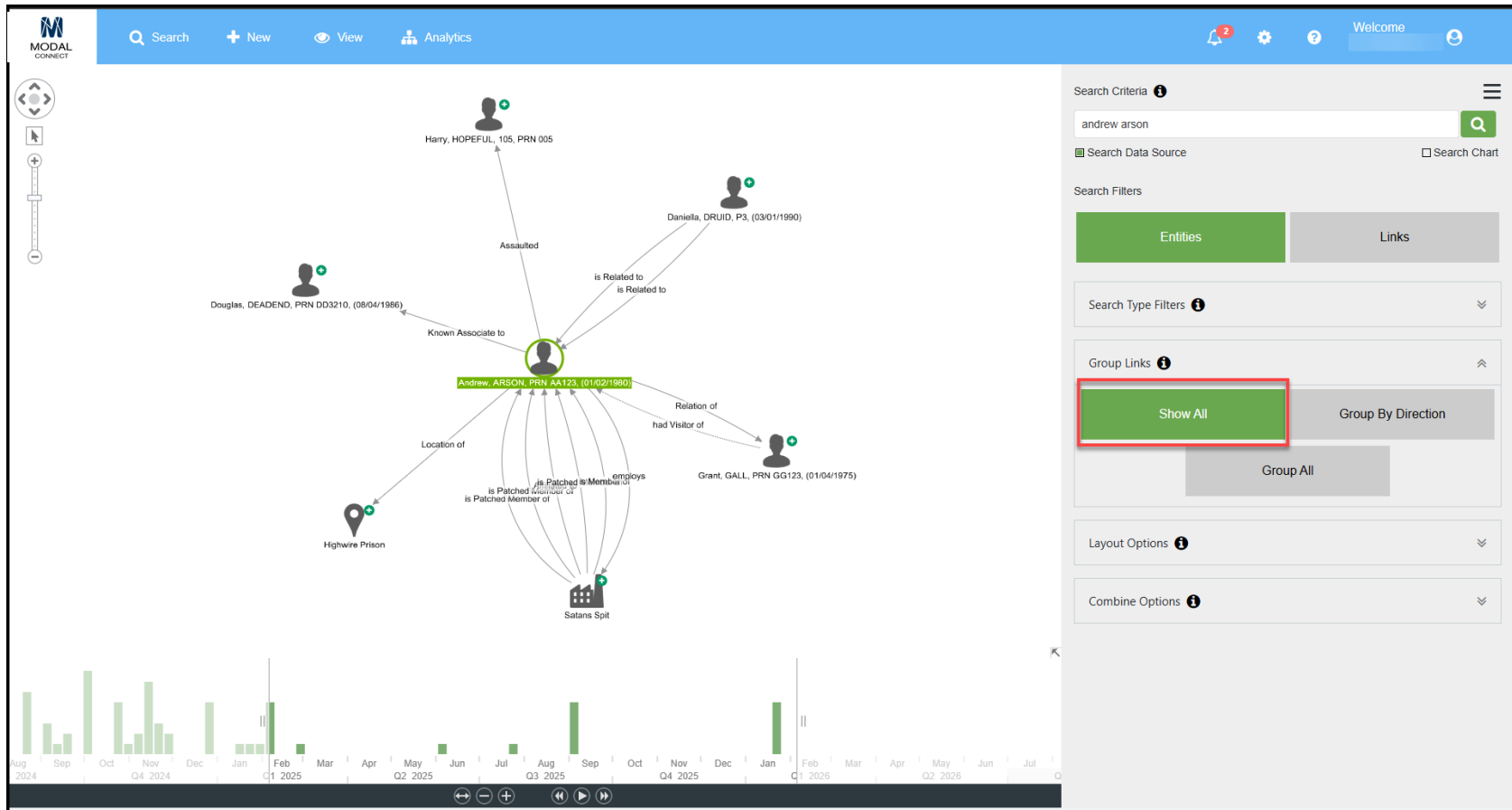


The Group By Direction filter shows the direction of underlying Links.



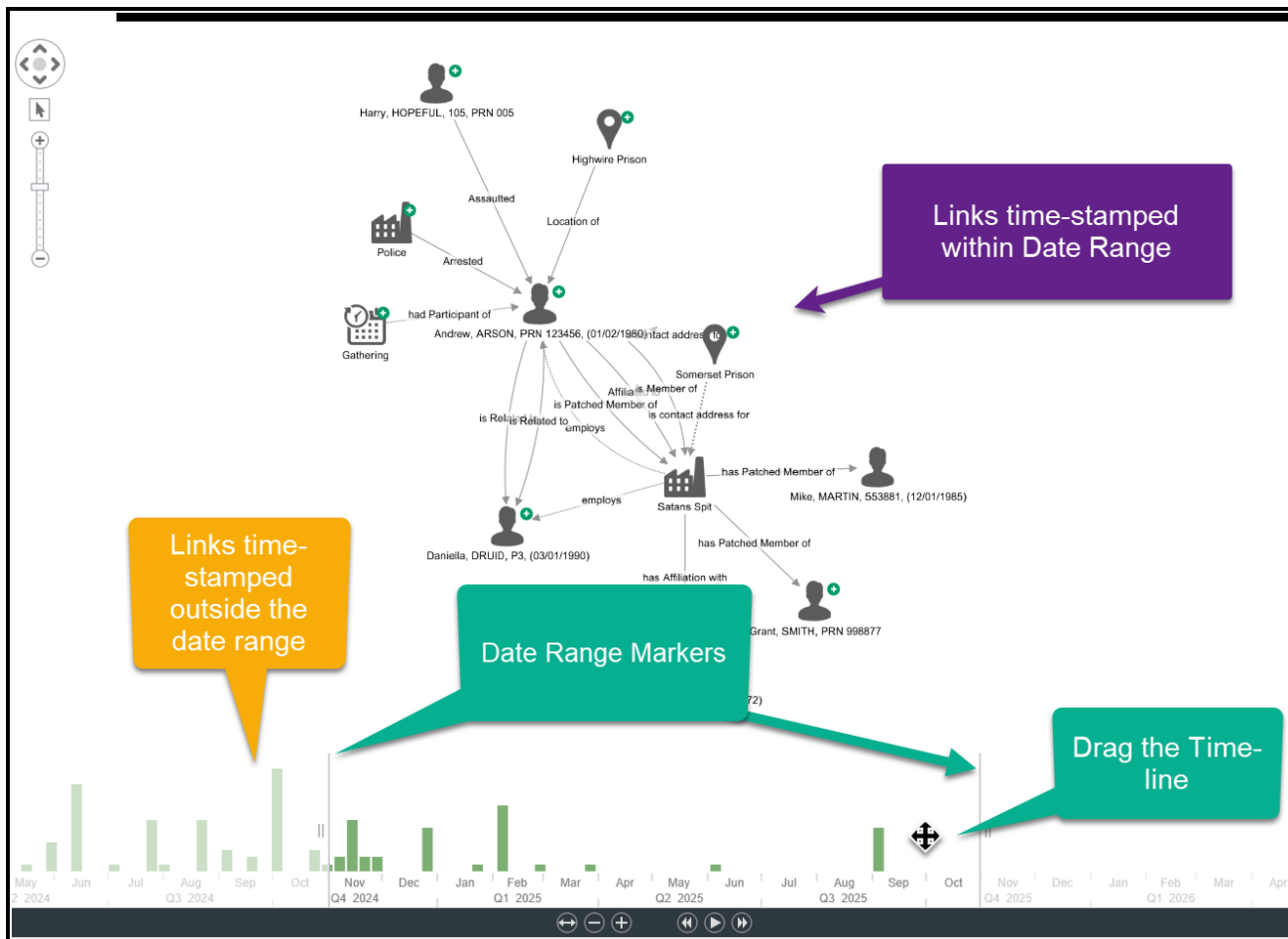


The 'Show All' filter results show the individual Links and their description, direction and status (line type; solid for confirmed, broken for tentative and dots for unconfirmed).





The time-bar can be expanded and or dragged to view Entities and links outside of the current date range. The time-bar navigation tools expand or move the date range.

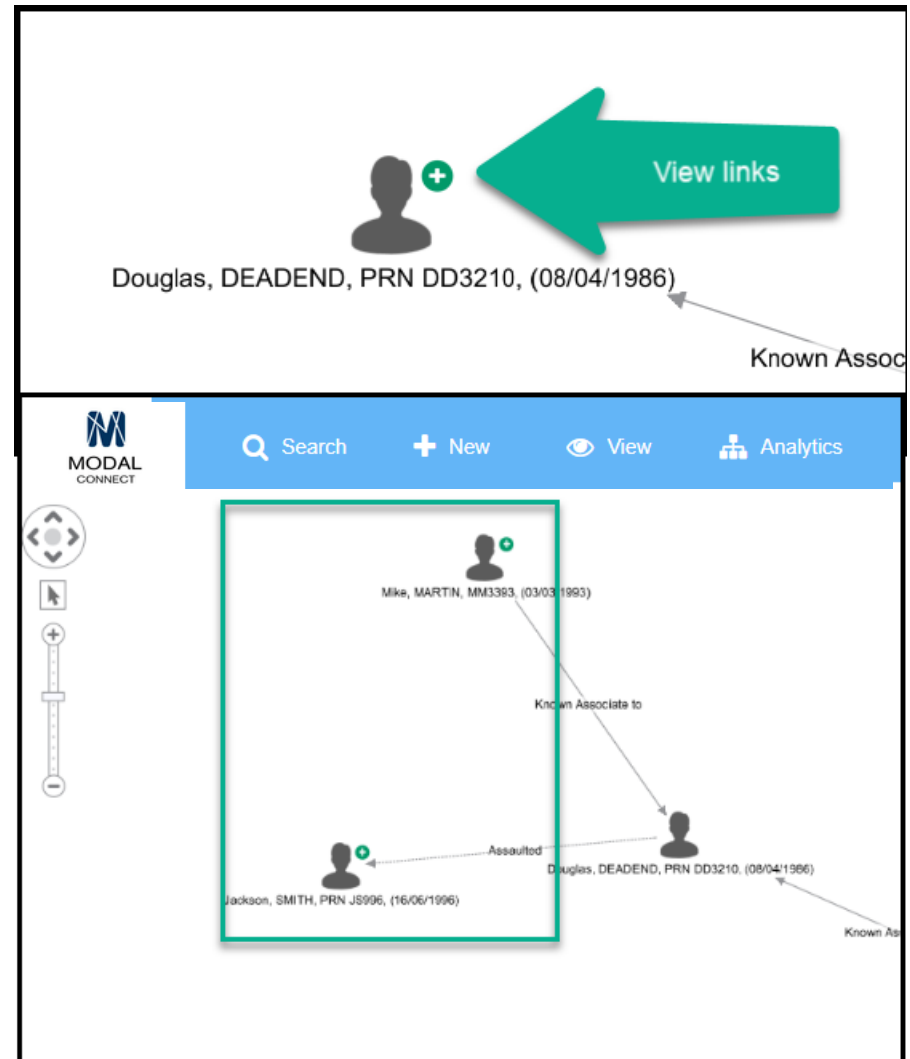




Expand and explore further links between Entities by clicking on the green symbol next to an Entity with additional Links.

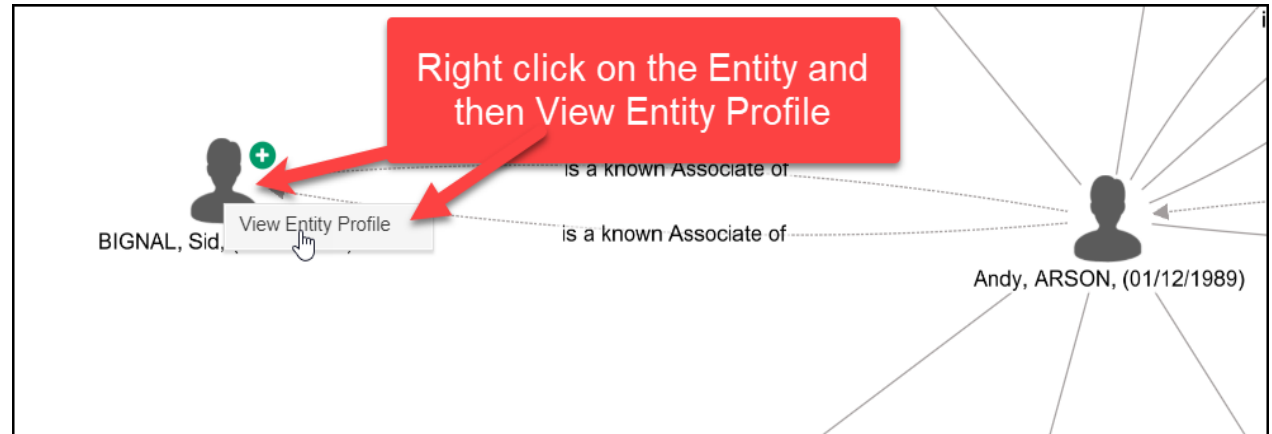
Note only links with a date-stamp for the date range in view will show.

If there is a blue symbol, links exist outside of the date range being used. Expand the date range to view

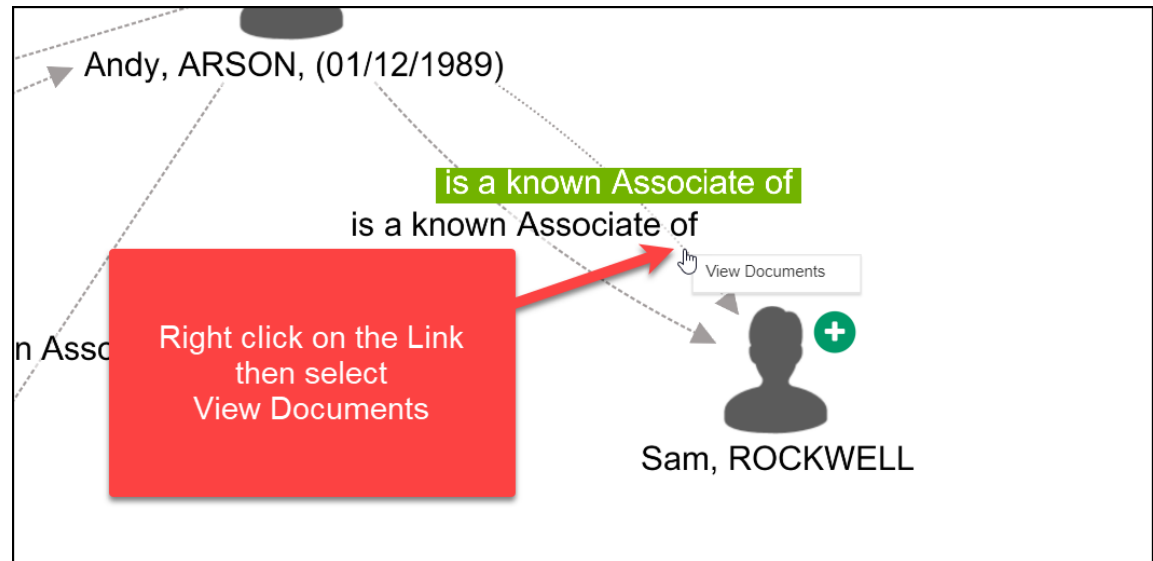




Right click on an Entity for the option to view an Entity's Profile (opens in a separate tab).



Right click on a Link for the option to view a list of the Documents related to it. (opens in a separate tab)

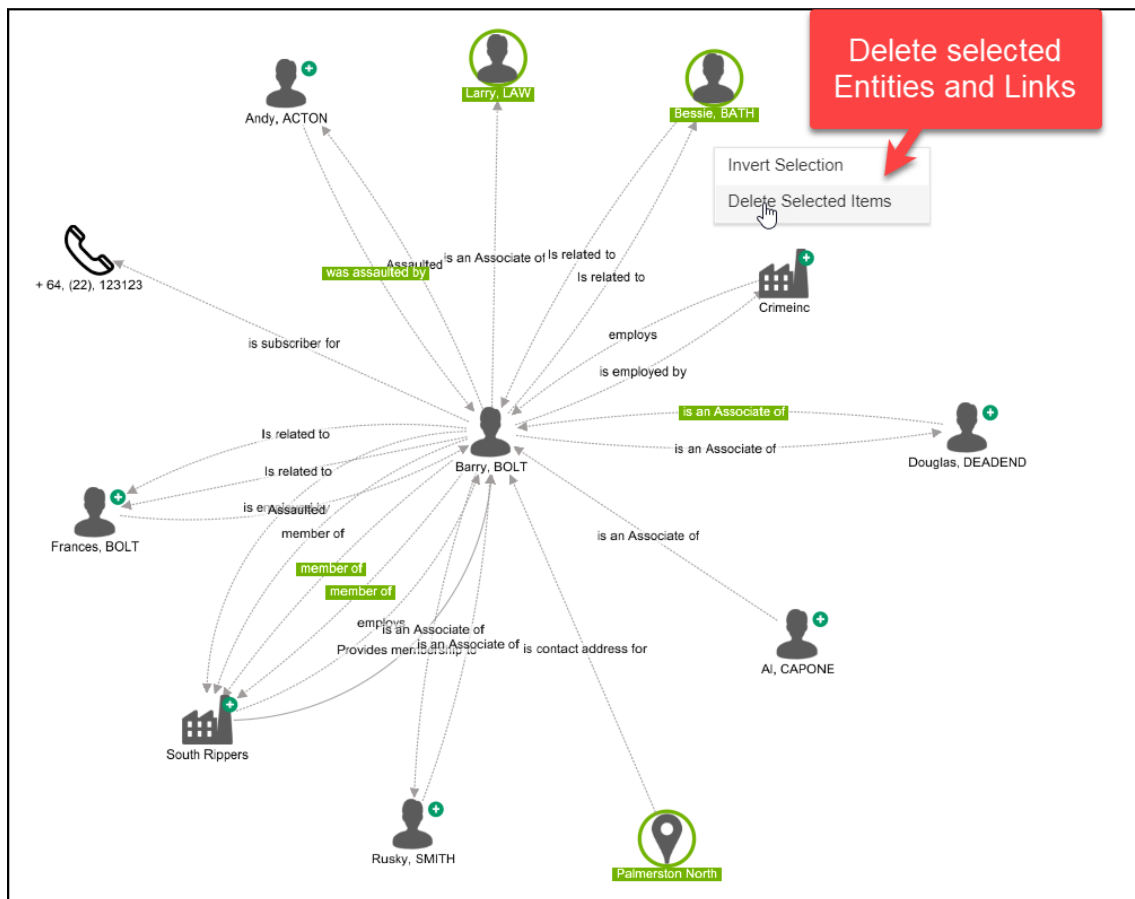


Delete items from Chart



Select unwanted Entities and Links from the Chart (Shift + click for multiples) and right click to select Delete Selected items or use keyboard delete .

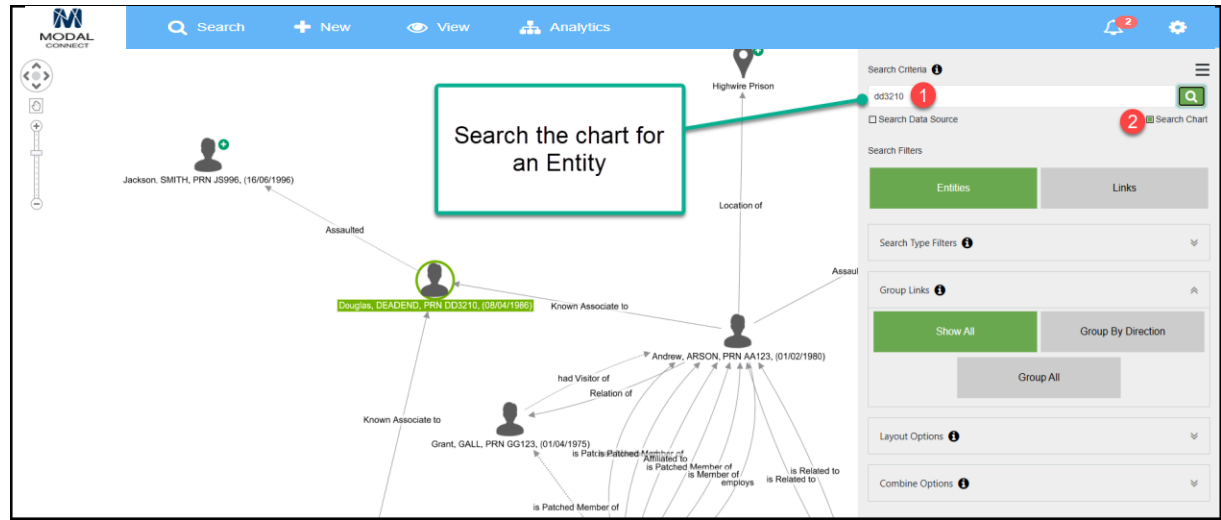
Or select Entities and Links to retain on the Chart – right click and select ‘Invert selection’ and the unwanted Entities are highlighted. Next right click again and select ‘Delete Selected items’.



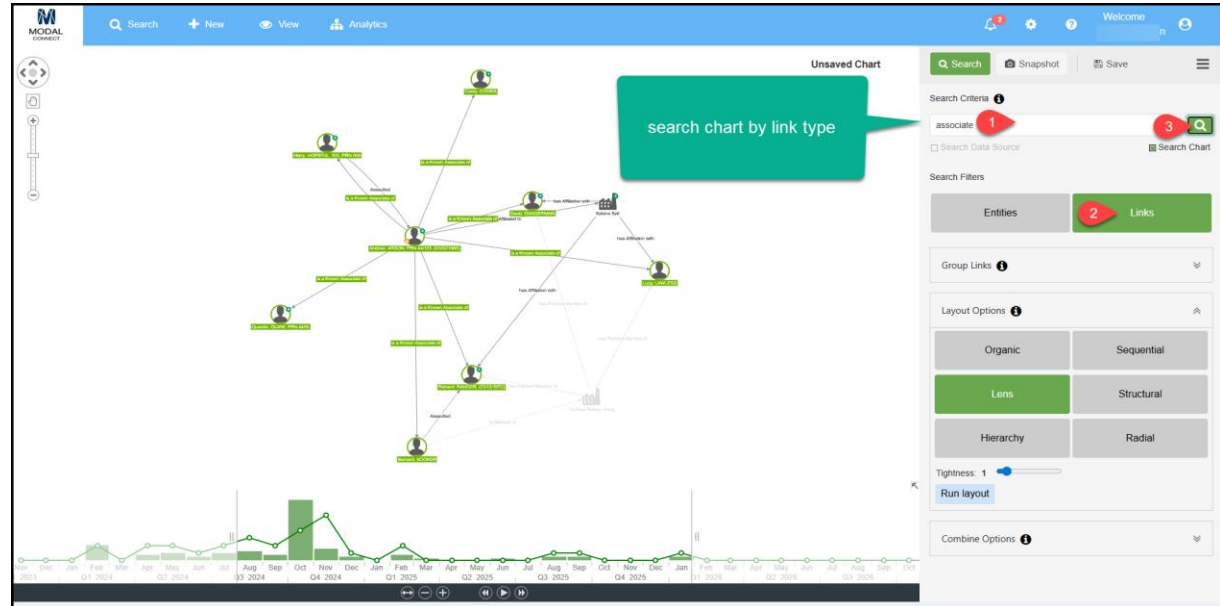
Search Chart for an Entity or Link

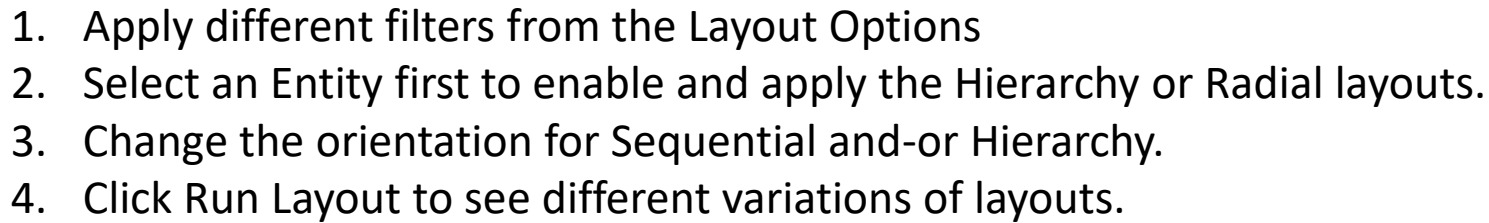


- Enter the Entity's name in the search box.
- Select 'Search Chart'
- Click Search or Enter.



- Enter the Link description (or keyword) in the Search box.
- Select Links.
- Click Search or Enter

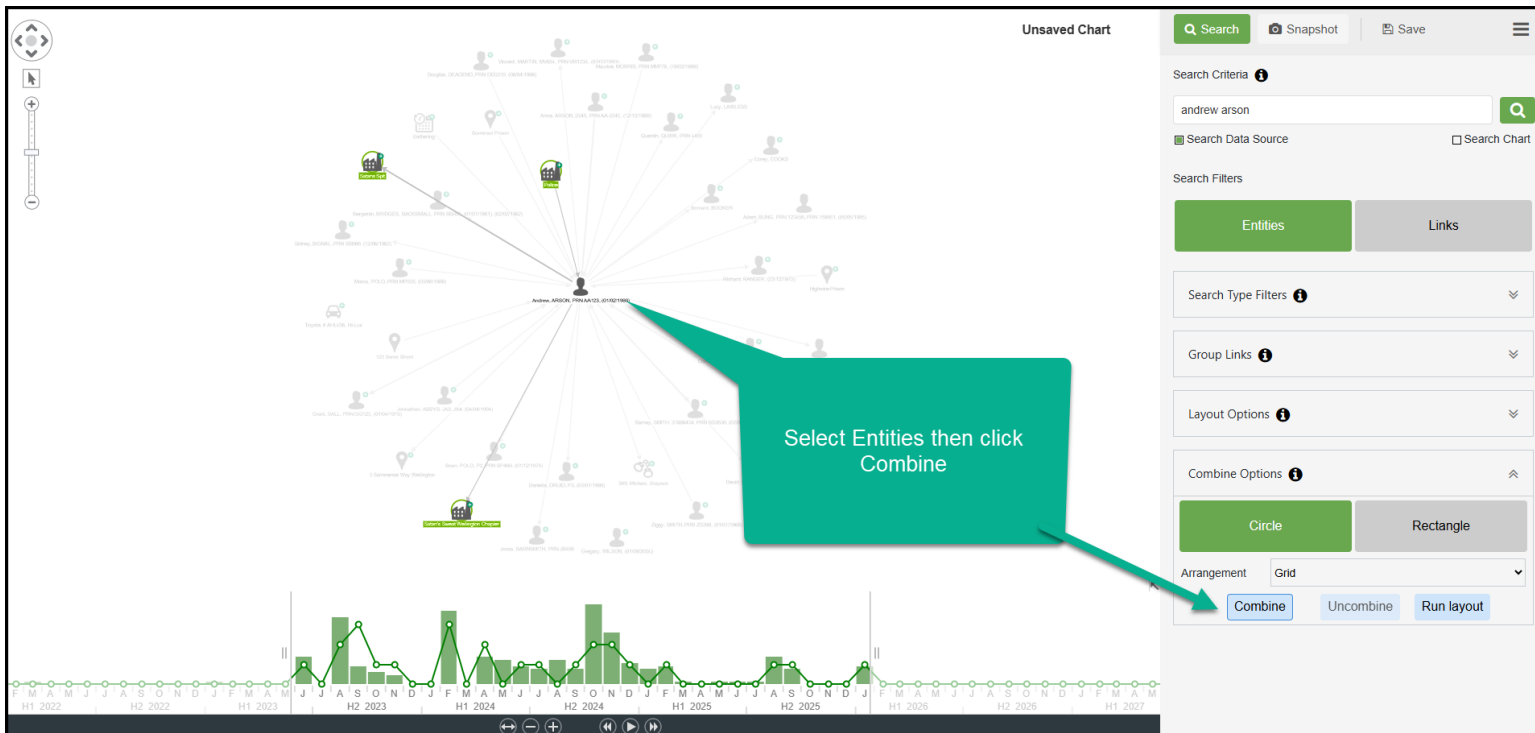




Combine Entities into a group



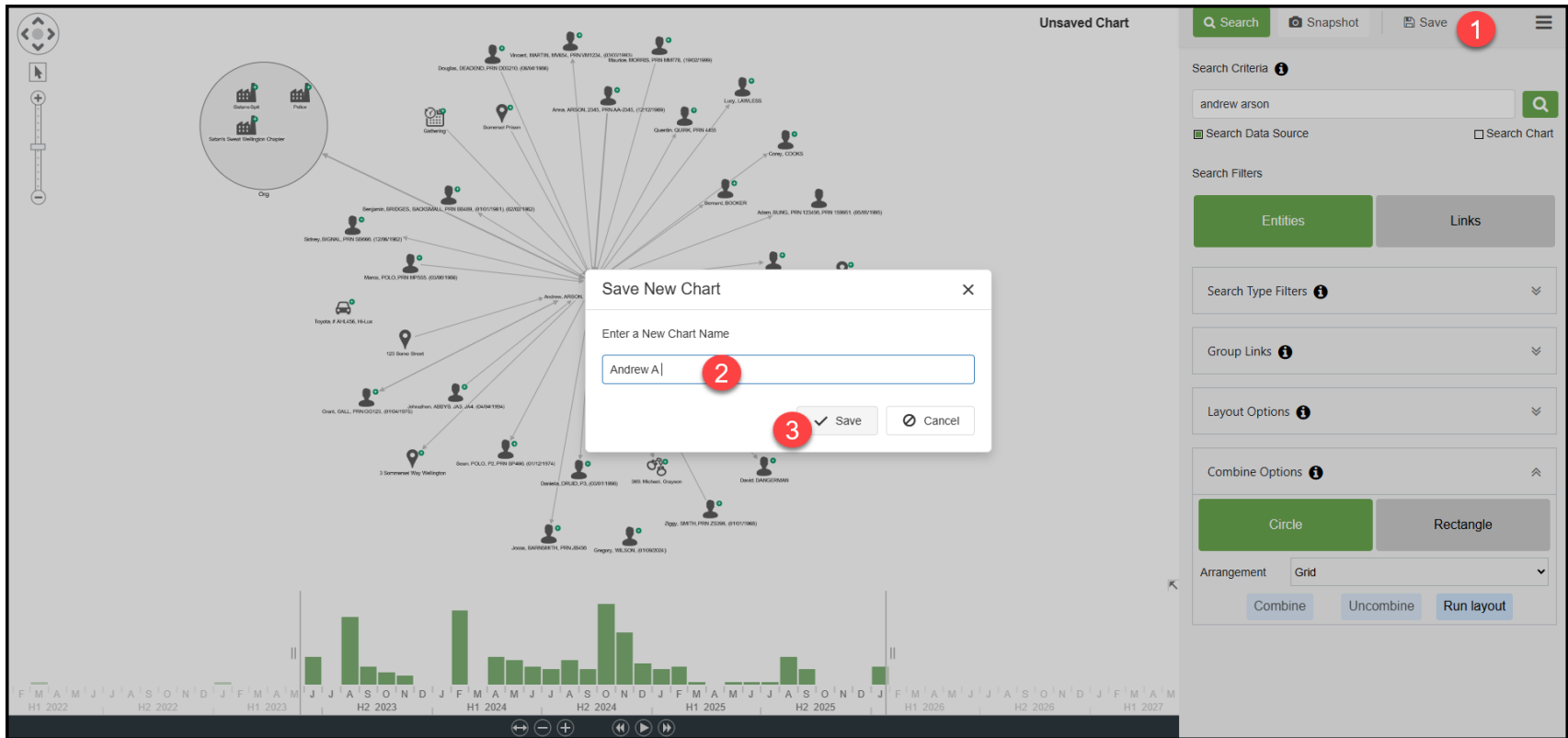
1. Use Shift + click to select at least 2 Entities
2. Circle is selected by default or can select Rectangle
3. Select Combine



Save a Chart

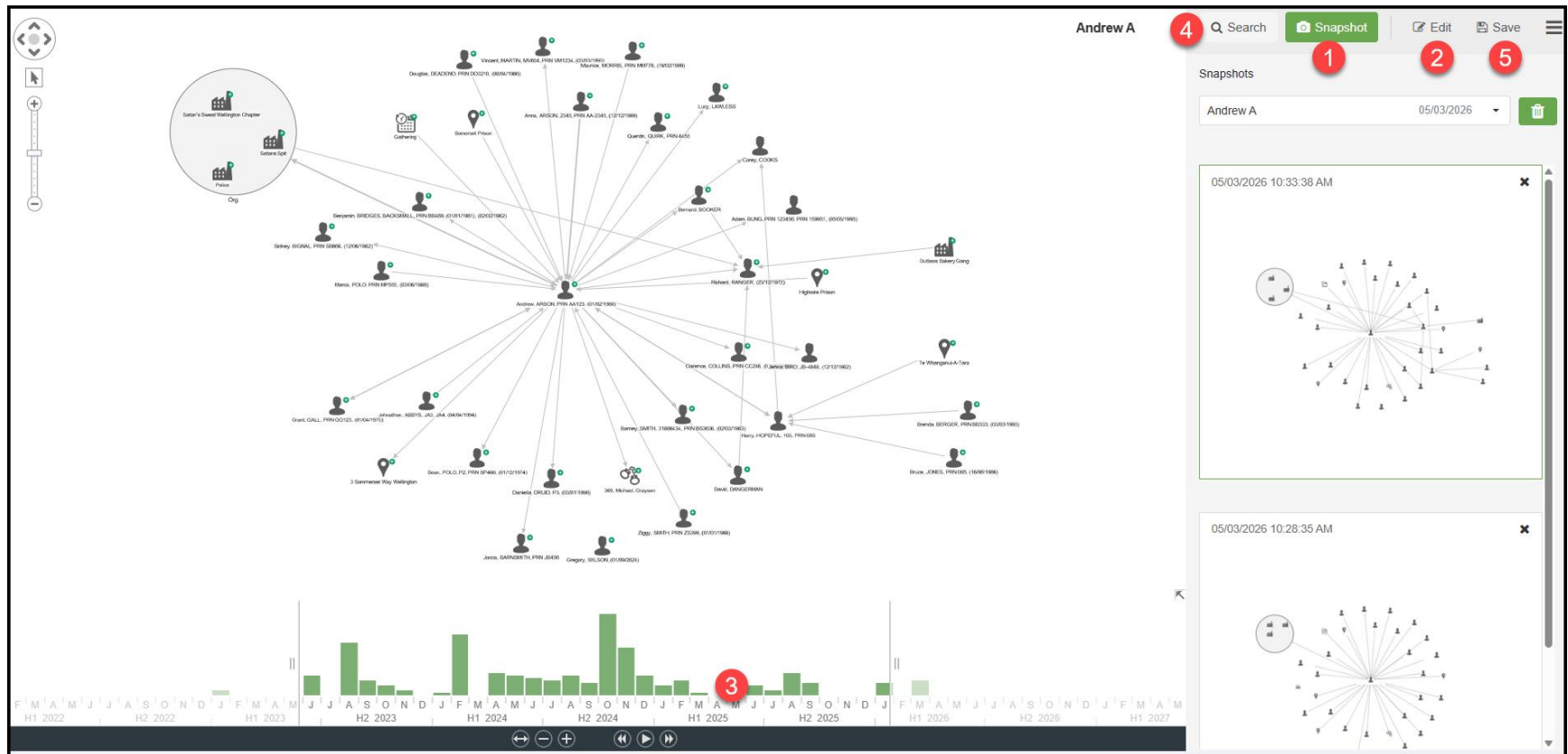


1. To save a copy of your Chart to Snapshots - click Save
2. Enter the Chart Name
3. Click Save





1. Select Snapshots to access your saved Charts (or opens by default after saving a chart)
2. Edit Snapshots to create different versions of a Chart, each saved version is added to the Snapshot list for the Chart
3. The date range can be changed and links expanded when editing snapshots.
4. To use the Grouping, Layout and Combine Options select Search.
5. Save edits and a new snapshot is added to the top of the list.





Make the Connection