



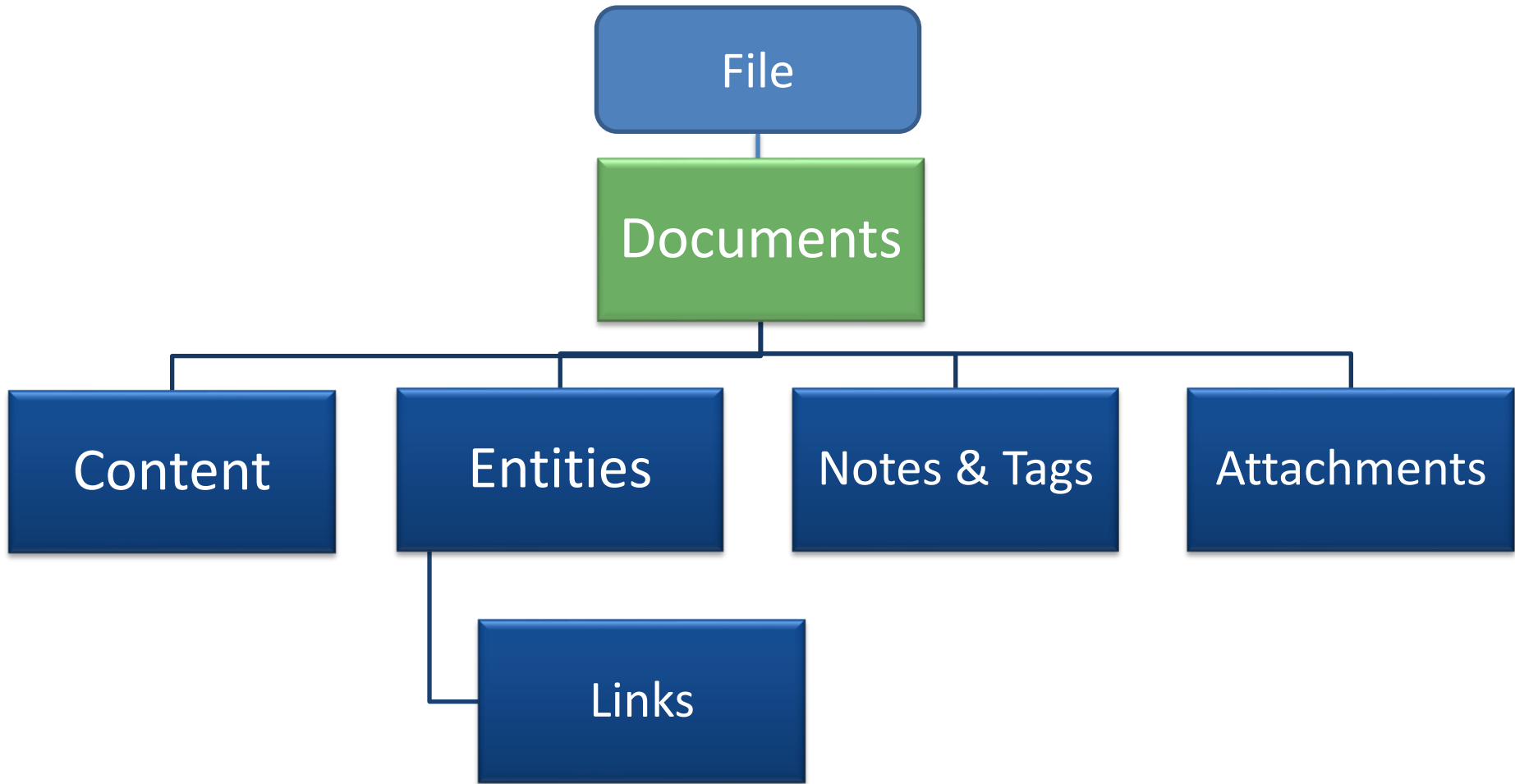
# ModalConnect User Training

## Documents

*Make the Connection*

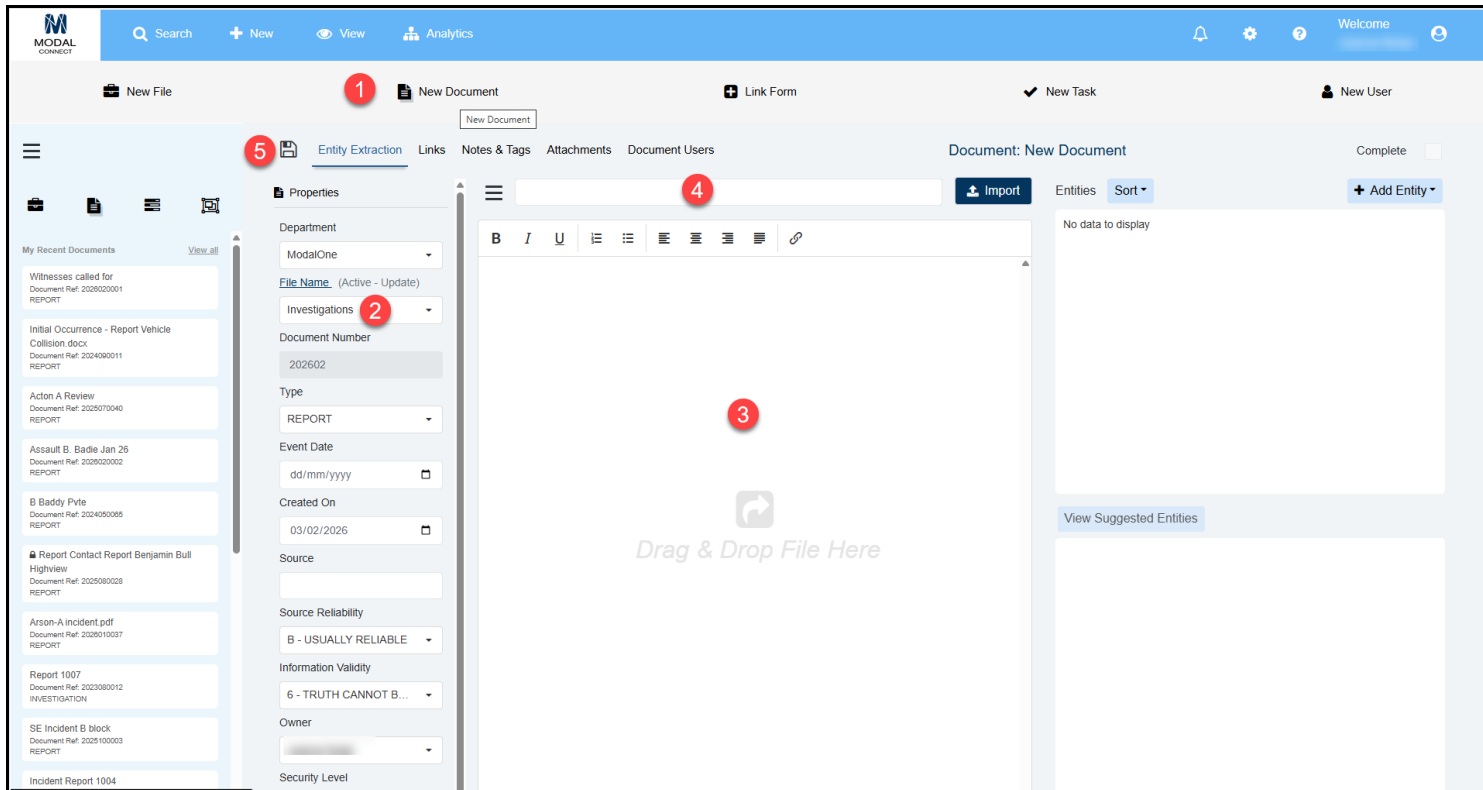


This Reference Guide focuses on the Document module and can be used in conjunction with the User Training Exercises resources.





1. From the Main menu select New then New Document. Complete any mandatory properties.
2. Complete the Document Details below the Properties
3. Add Content using 1of the 4 methods available (Drag & Drop, Import, Copy & Paste or enter text content manually).
4. Add a Title (for copy & paste or manually entering content) or edit the Title (remove File type).
5. Save the new Document



The screenshot shows the 'New Document' form in the MODAL CONNECT application. The form is divided into several sections:

- Properties:** Contains fields for Department (ModalOne), File Name (Active - Update), Investigations (2), Document Number (202602), Type (REPORT), Event Date (dd/mm/yyyy), Created On (03/02/2026), Source, Source Reliability (B - USUALLY RELIABLE), Information Validity (6 - TRUTH CANNOT B...), Owner, and Security Level.
- Content Area:** A large text area with a 'Drag & Drop File Here' watermark and a red circle (3) indicating where to add content. An 'Import' button is visible above the text area.
- Title Field:** A text input field with a red circle (4) indicating where to add or edit the title.
- Navigation:** A top navigation bar with 'New Document' (1) and 'New File' (5) buttons.



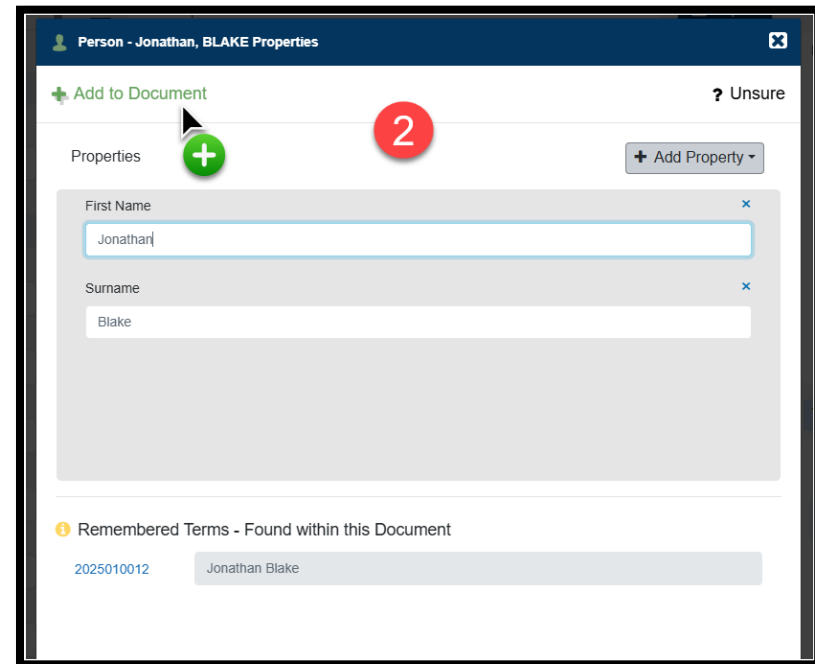
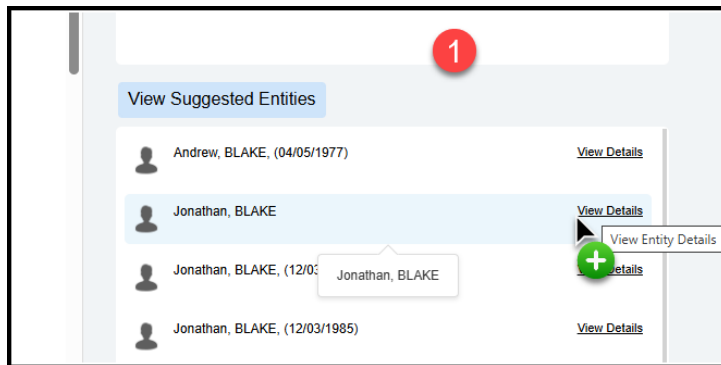
Once a new Document has been saved, Entities can be added.

The screenshot displays the Modal Connect interface for a document titled "Initial Report Vehicle Collision Riverton". The interface is divided into several sections:

- Header:** Includes the Modal Connect logo, search bar, navigation icons (New, View, Analytics), and user information (Welcome).
- Document Header:** Shows the document title "Initial Report Vehicle Collision Riverton", an "Import" button, and a "Complete" checkbox.
- Left Sidebar:** Labeled "My Recent Documents", it lists several documents with their titles and document references.
- Entity Extraction Panel:** A vertical panel on the left of the main content area with the following fields:
  - Department: ModalOne
  - File Name: (Active - Update) Investigations
  - Document Number: 2026020005
  - Type: REPORT
  - Event Date: 23/12/2025
  - Created On: 03/02/2026
  - Source: [Empty field]
  - Source Reliability: B - USUALLY RELIABLE
  - Information Validity: 6 - TRUTH CANNOT BE...
  - Owner: [Empty field]
  - Security Level: Highly Sensitive
- Main Content Area:** Contains the document text, which includes:
  - Title: Initial Occurrence Report – Vehicle Collision
  - Date: 23/12/2025
  - Time: 14:35
  - Location: Intersection of Elm Street and Maple Avenue, Riverton
  - Incident Description: At approximately 14:35 on 23rd December 2025, a multi-vehicle collision occurred at the intersection of Elm Street and Maple Avenue. The collision involved four vehicles and resulted in minor injuries to all drivers involved. Emergency services were on the scene within 10 minutes.
  - Involved Parties:
    - Driver 1:
      - Name: Jonathan Blake
      - Date of Birth: 12/03/1985
      - Vehicle:
        - Color: Red
        - Make and Model: Ford Mustang
        - Plate Number: AB123CD
    - Driver 2:
      - Name: Lena Connor 29/07/1990
      - Date of Birth: 29/07/1990
      - Vehicle:
        - Color: Silver
        - Make and Model: Toyota Corolla
        - Plate Number: XY237ZT
    - Driver 3:
      - Name: Samuel Harris 05/11/1978
      - Date of Birth: 05/11/1978
      - Vehicle:
        - Color: Silver
        - Make and Model: Honda CR-V
        - Plate Number: GH789IJ
    - Driver 4:
      - Name: Shady Sanson
      - Date of Birth: 05/02/1972
      - Vehicle: [Empty field]
- Right Panel:** Shows "Entities (14)" with a "Sort" dropdown and an "Add Entity" button. Below this is a "View Suggested Entities" button.

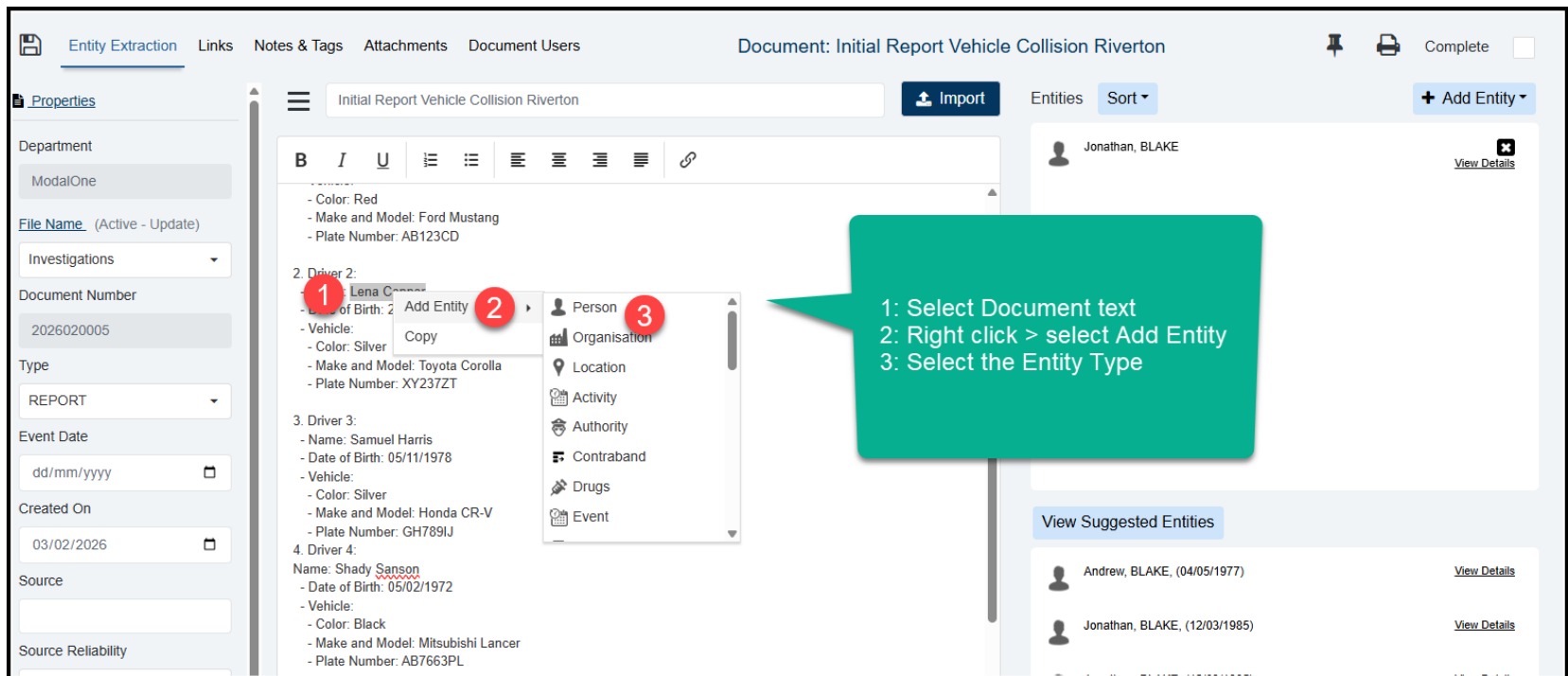


1. Click on View Suggested Entities to load existing Entities identified within the content.
2. Click View Details to review a suggested Entity. Select Add to Document to add a suggested Entity to the current Document.





1. Extract Entity details directly from Document Content
2. Right click and select Add Entity
3. Select the Entity Type



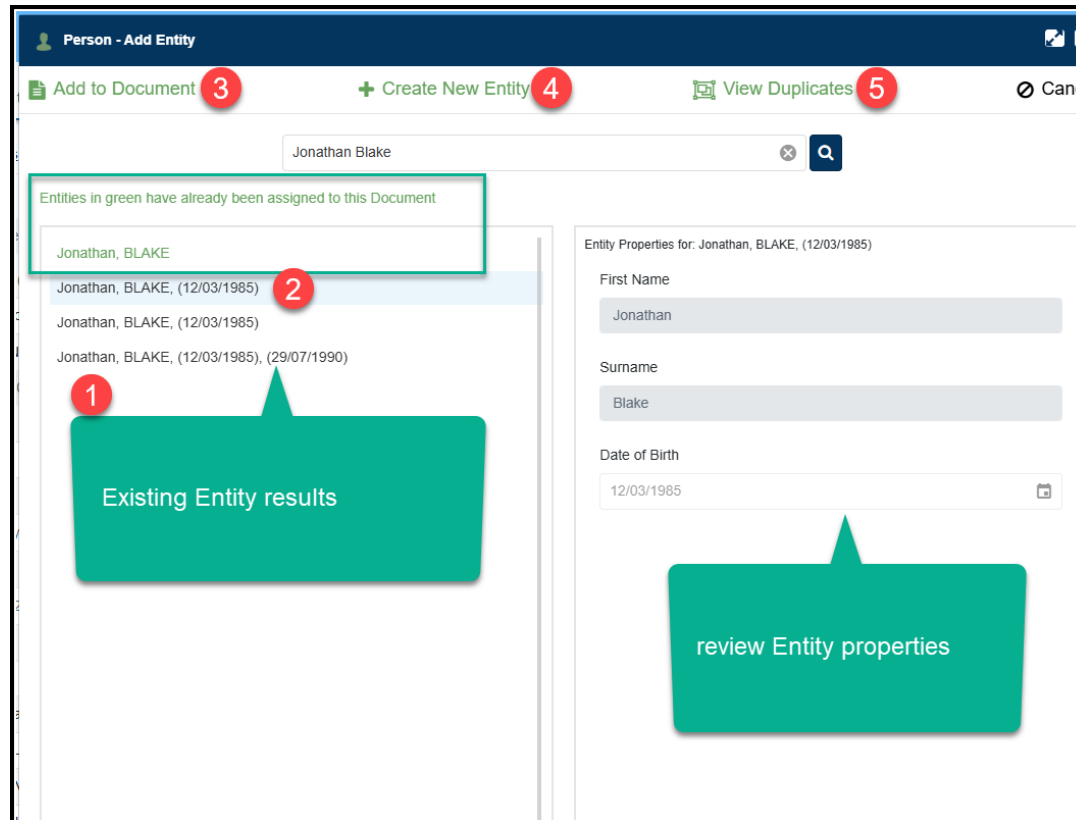
The screenshot displays the Modal Connect interface for a document titled "Initial Report Vehicle Collision Riverton". The document content is shown in a rich text editor with a toolbar. A right-click context menu is open over the text "Lena O", showing options like "Copy", "Add Entity", "Person", "Organisation", "Location", "Activity", "Authority", "Contraband", "Drugs", and "Event". Red circles and arrows highlight the steps: 1. Selecting the document text, 2. Right-clicking and selecting "Add Entity", and 3. Selecting the "Person" entity type. A green callout box contains the following instructions:

- 1: Select Document text
- 2: Right click > select Add Entity
- 3: Select the Entity Type

The interface also shows a sidebar with document properties, a top navigation bar with "Entity Extraction" selected, and a right sidebar with "Entities" and "Add Entity" buttons. A "View Suggested Entities" section is visible at the bottom right, listing "Andrew, BLAKE, (04/05/1977)" and "Jonathan, BLAKE, (12/03/1985)".



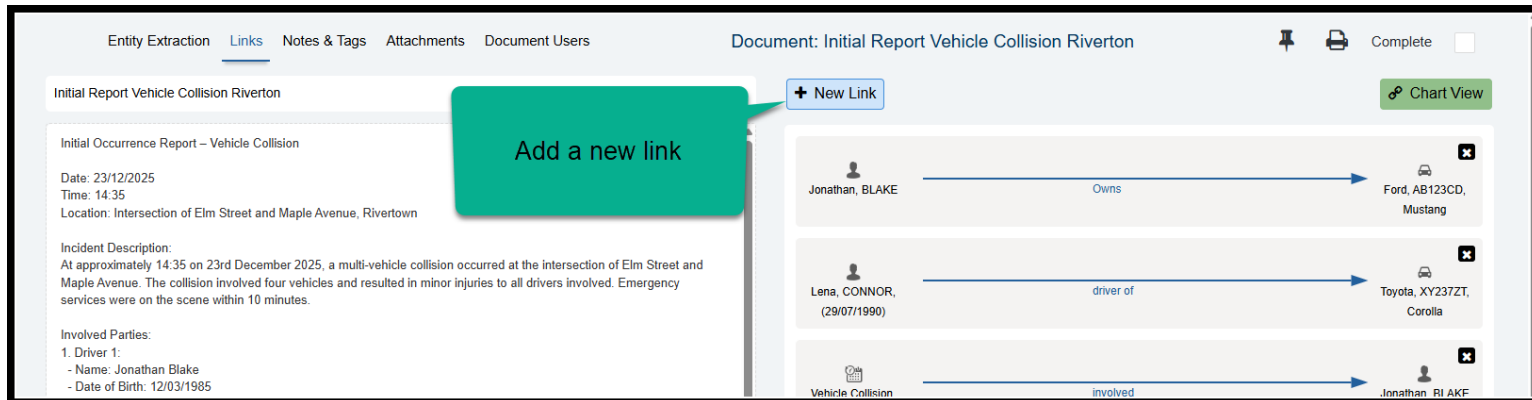
1. Search results for existing Entities
2. Click on an existing Entity to review their properties
3. Add selected Entity to Document
4. Create a New Entity
5. View Duplicate Entities



The screenshot shows the 'Person - Add Entity' interface. At the top, there are three buttons: 'Add to Document' (3), '+ Create New Entity' (4), and 'View Duplicates' (5). A search bar contains 'Jonathan Blake'. Below the search bar, a list of search results is shown. The first result, 'Jonathan, BLAKE', is highlighted in green and has a red circle '2' next to it. A green callout box with a red circle '1' points to this result and contains the text 'Existing Entity results'. To the right of the search results, the 'Entity Properties for: Jonathan, BLAKE, (12/03/1985)' are displayed. A green callout box with a red circle '2' points to the 'Date of Birth' field, which contains '12/03/1985', and contains the text 'review Entity properties'. A red circle '3' is next to the 'Add to Document' button, a red circle '4' is next to the '+ Create New Entity' button, and a red circle '5' is next to the 'View Duplicates' button.



Open the Links Page  
To create a New Link – select ‘New Link’



The screenshot displays the 'Links' page for a document titled 'Initial Report Vehicle Collision Riverton'. The page is divided into a sidebar on the left and a main content area on the right. The sidebar contains the following information:

- Entity Extraction | **Links** | Notes & Tags | Attachments | Document Users
- Document: Initial Report Vehicle Collision Riverton
- Initial Report Vehicle Collision Riverton
- Initial Occurrence Report – Vehicle Collision
- Date: 23/12/2025
- Time: 14:35
- Location: Intersection of Elm Street and Maple Avenue, Rivertown
- Incident Description: At approximately 14:35 on 23rd December 2025, a multi-vehicle collision occurred at the intersection of Elm Street and Maple Avenue. The collision involved four vehicles and resulted in minor injuries to all drivers involved. Emergency services were on the scene within 10 minutes.
- Involved Parties:
  - Driver 1:
    - Name: Jonathan Blake
    - Date of Birth: 12/03/1985

The main content area features a '+ New Link' button and a 'Chart View' button. Below these, there are three existing links:

- Jonathan, BLAKE (person icon) — Owns —> Ford, AB123CD, Mustang (car icon)
- Lena, CONNOR, (29/07/1990) (person icon) — driver of —> Toyota, XY237ZT, Corolla (car icon)
- Vehicle Collision (document icon) — involved —> Jonathan, RI AKF (person icon)

A green callout box with the text 'Add a new link' points to the '+ New Link' button.




1. Select the From Entity
2. Select the Link Description
3. Select the To Entity (or Entities)
4. Complete the Status (if known) and any Time dependency record (if present).
5. Click Finish


Document: Initial Report Vehicle Collision Riverton

Finish **5**

 Complete

  
 Jonathan,  
BLAKE

→

  
 Ford,  
AB123CD,  
Mustang

From

Jonathan, BLAKE **1**

Link Description

Owns **2**

To

CR-V, GH789IJ, Honda  
 Ford, AB123CD, Mustang **3**  
 Mitsubishi, AB7663PL, Lancer  
 Toyota, XY237ZT, Corolla

Time Dependencies

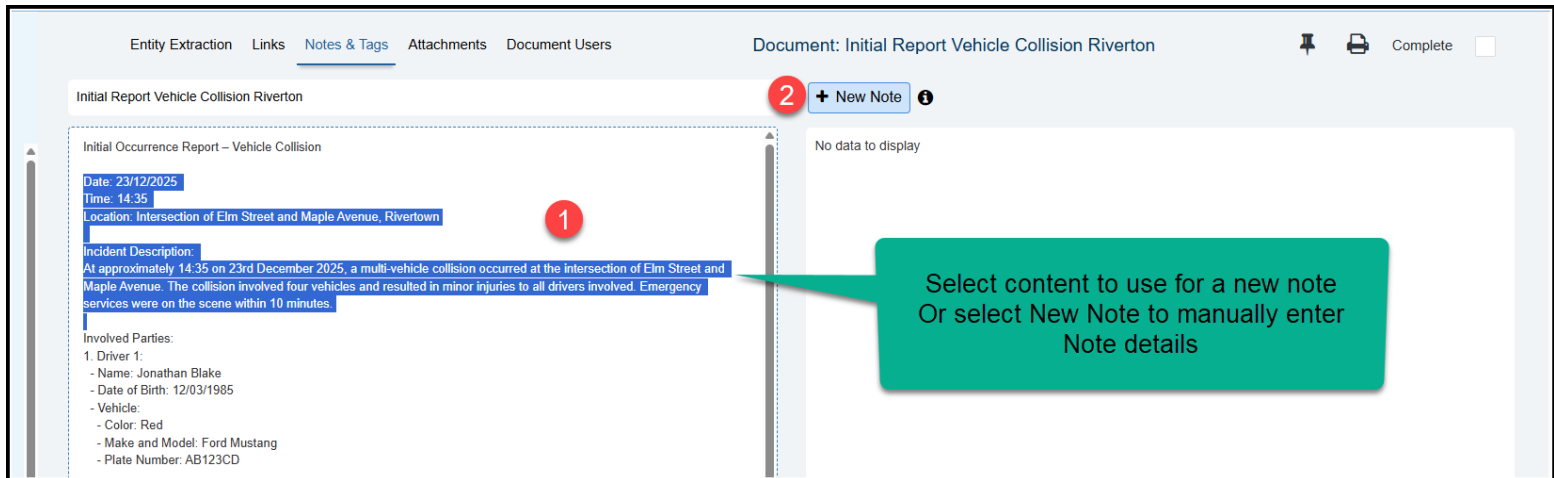
[+ New Time Dependency](#)

No	Start Date	Finish Date	Status	
1	01/06/2025 14:45:00	Unknown <b>4</b>	Confirmed	<input type="button" value="X"/>

Page 1 of 1 (1 items) < 1 >



1. Highlight content text (from the left pane) and click New Note
2. Or select New Note to manually enter the Note details



Entity Extraction Links **Notes & Tags** Attachments Document Users Document: Initial Report Vehicle Collision Riverton

Initial Report Vehicle Collision Riverton + New Note

Initial Occurrence Report – Vehicle Collision

Date: 23/12/2025  
 Time: 14:35  
 Location: Intersection of Elm Street and Maple Avenue, Riverton

Incident Description:  
 At approximately 14:35 on 23rd December 2025, a multi-vehicle collision occurred at the intersection of Elm Street and Maple Avenue. The collision involved four vehicles and resulted in minor injuries to all drivers involved. Emergency services were on the scene within 10 minutes.

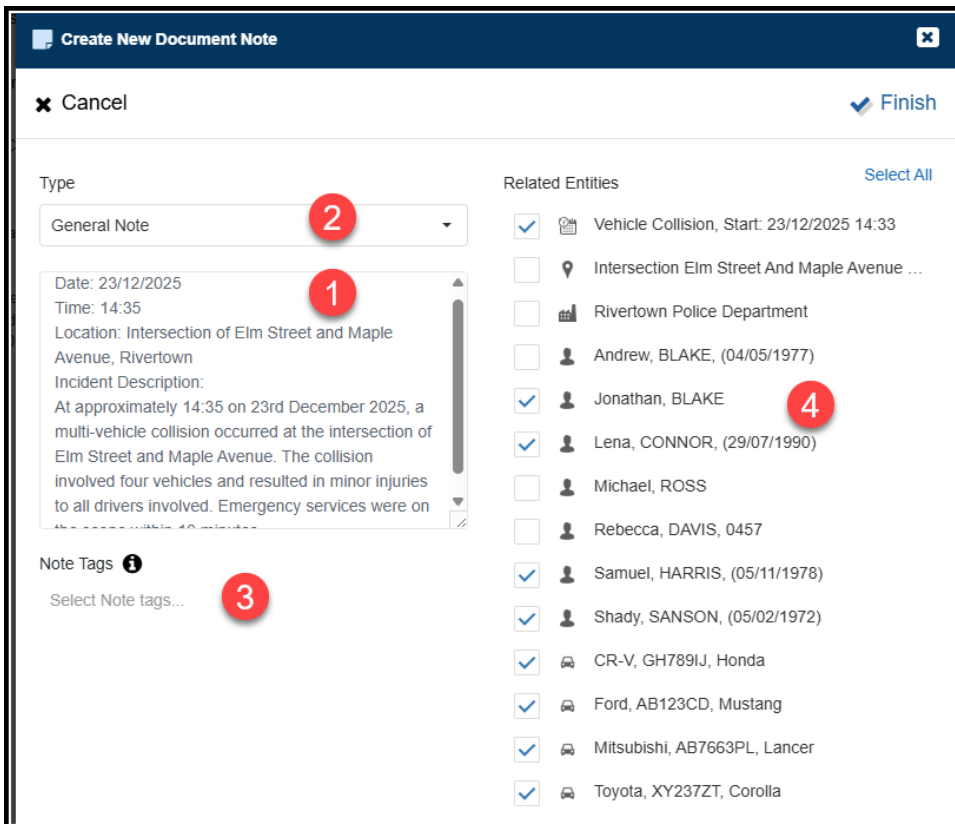
Involved Parties:  
 1. Driver 1:  
 - Name: Jonathan Blake  
 - Date of Birth: 12/03/1985  
 - Vehicle:  
 - Color: Red  
 - Make and Model: Ford Mustang  
 - Plate Number: AB123CD

No data to display

Select content to use for a new note  
 Or select New Note to manually enter  
 Note details



1. In the new Note the content can be edited
2. Select the Note Type
3. Select a Note Tag (optional)
4. Select Document Entities to append the Note to. Click Finish





The screenshot shows the 'Create New Document Note' interface. It includes a 'Type' dropdown menu set to 'General Note' (callout 2), a text area for the note content (callout 1) containing details like date, time, location, and incident description, and a 'Note Tags' section (callout 3) with a search input. On the right, a 'Related Entities' list (callout 4) includes various entities such as 'Vehicle Collision', 'Intersection Elm Street And Maple Avenue ...', 'Rivertown Police Department', and several individuals and vehicles, each with a selection checkbox.



## 1. Add Document Tags – which can be used to categorize Documents.

Entity Extraction
Links
Notes & Tags
Attachments
Document Users

Document: Initial Report Vehicle Collision Riverton



Complete

**Initial Report Vehicle Collision Riverton**

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**Initial Occurrence Report – Vehicle Collision**

Date: 23/12/2025  
 Time: 14:35  
 Location: Intersection of Elm Street and Maple Avenue, Rivertown

**Incident Description:**  
 At approximately 14:35 on 23rd December 2025, a multi-vehicle collision occurred at the intersection of Elm Street and Maple Avenue. The collision involved four vehicles and resulted in minor injuries to all drivers involved. Emergency services were on the scene within 10 minutes.

**Involved Parties:**

**1. Driver 1:**

- Name: Jonathan Blake
- Date of Birth: 12/03/1985
- Vehicle:
- Color: Red
- Make and Model: Ford Mustang
- Plate Number: AB123CD

**2. Driver 2:**

- Name: Lena Connor 29/07/1990
- Date of Birth: 29/07/1990
- Vehicle:
- Color: Silver
- Make and Model: Toyota Corolla
- Plate Number: XY237ZT

**3. Driver 3:**

- Name: Samuel Harris
- Date of Birth: 05/11/1978
- Vehicle:
- Color: Silver
- Make and Model: Honda CR-V
- Plate Number: GH789IJ

**+ New Note** ⓘ

**General Note** ⓘ

Updated: 03/02/2026 | Added: 03/02/2026

Date: 23/12/2025  
 Time: 14:35  
 Location: Intersection of Elm Street and Maple Avenue, Rivertown...

[View Full Note](#)

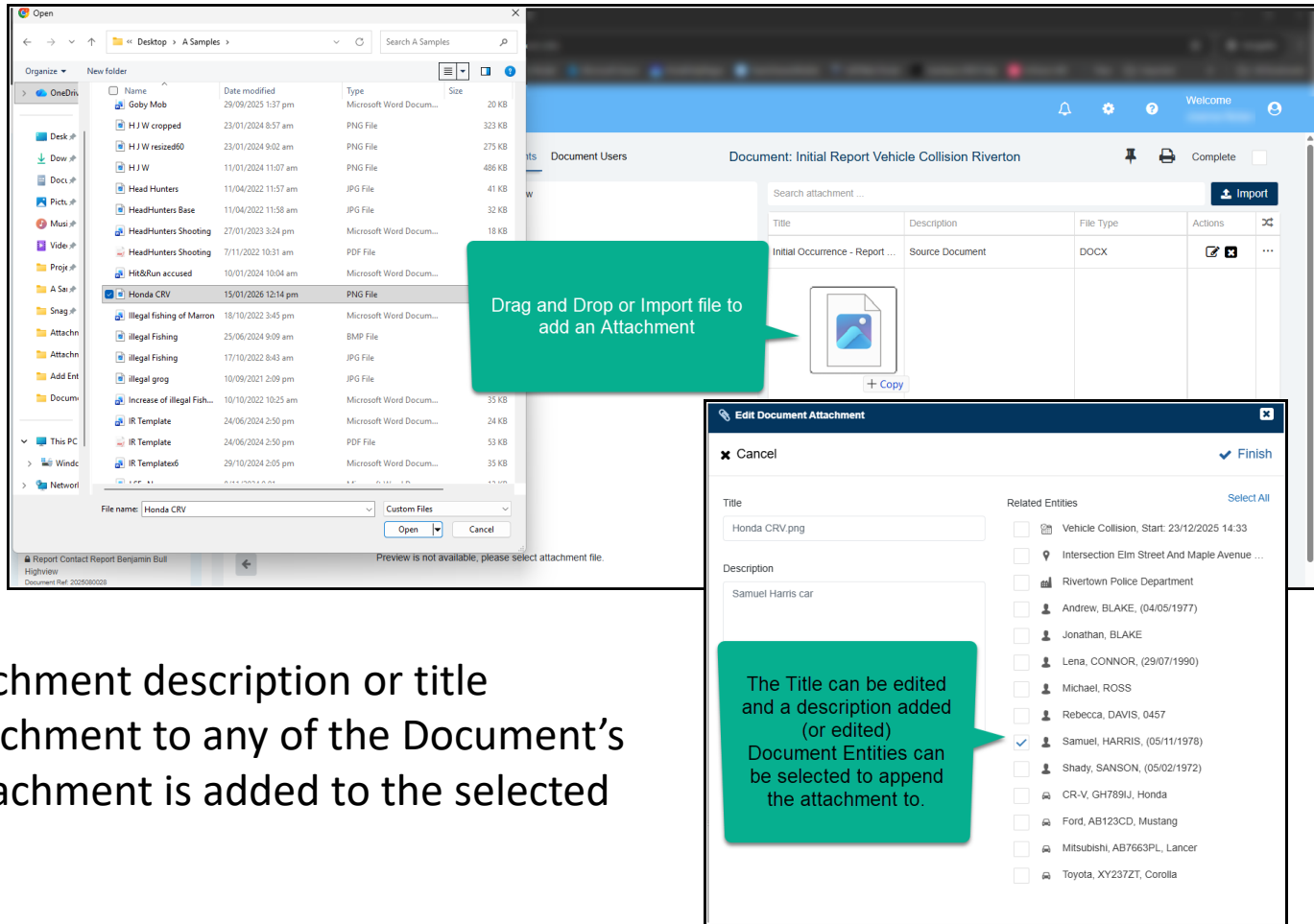
**Document Tags** ⓘ

Modal ⓘ

Click here to select and add a Document Tag



To add a new Attachment click the Import button or Drag & Drop onto the listing.



The screenshot shows a file explorer window on the left with a list of files. The file 'Honda CRV' is selected. A green callout bubble points to the 'Honda CRV' file with the text: "Drag and Drop or Import file to add an Attachment".

The main window shows a document titled "Document: Initial Report Vehicle Collision Riverton". There is an "Import" button and a table of attachments. The table has columns for Title, Description, File Type, and Actions. One attachment is listed: "Initial Occurrence - Report ..." with a description of "Source Document" and a file type of "DOCX". A "+ Copy" button is visible below the table.

An "Edit Document Attachment" dialog box is open, showing the following fields:

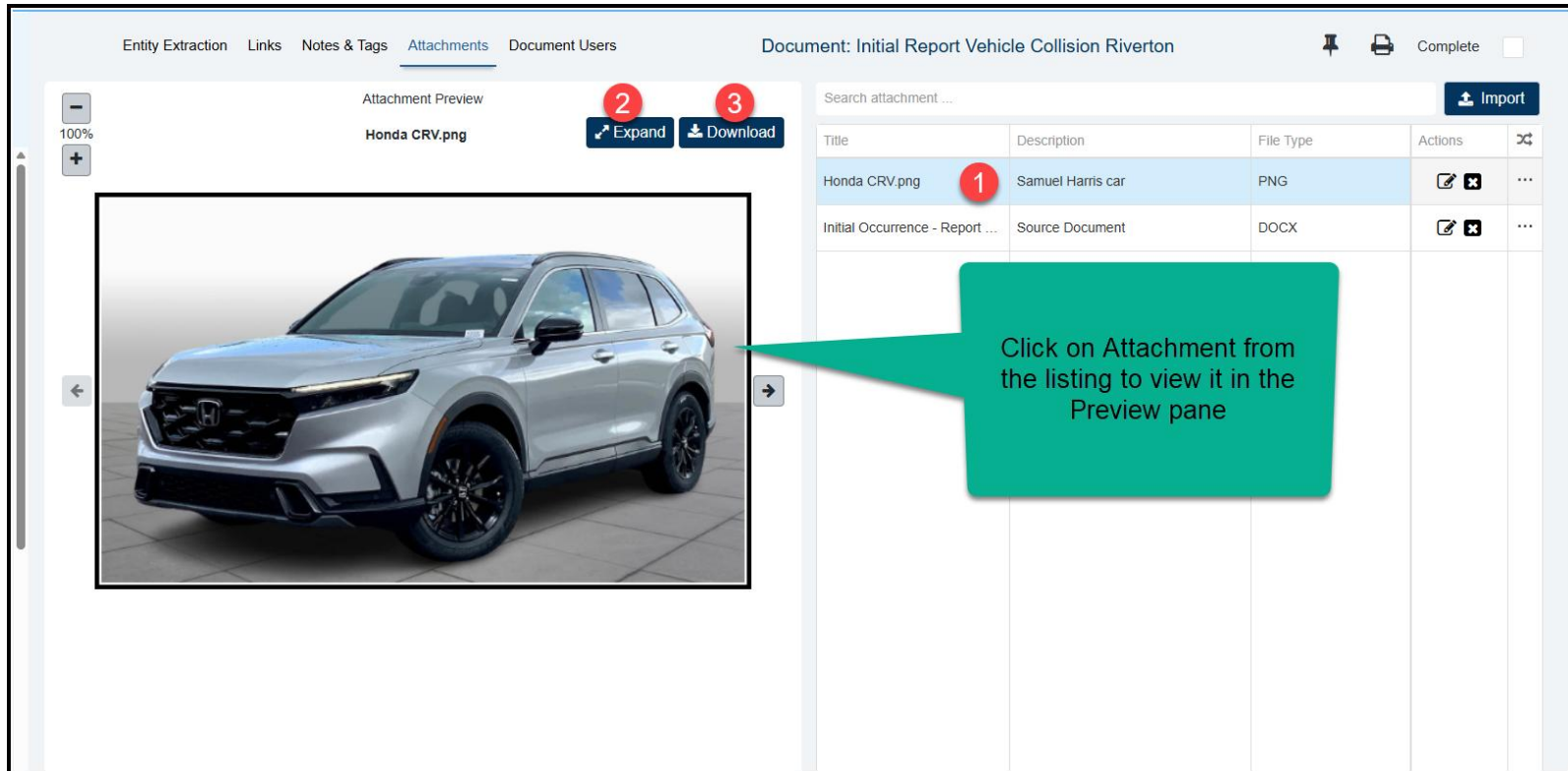
- Title: Honda CRV.png
- Description: Samuel Harris car
- Related Entities: A list of entities including "Vehicle Collision, Start: 23/12/2025 14:33", "Intersection Elm Street And Maple Avenue ...", "Rivertown Police Department", "Andrew, BLAKE, (04/05/1977)", "Jonathan, BLAKE", "Lena, CONNOR, (29/07/1990)", "Michael, ROSS", "Rebecca, DAVIS, 0457", "Samuel, HARRIS, (05/11/1978)", "Shady, SANSON, (05/02/1972)", "CR-V, GH789UJ, Honda", "Ford, AB123CD, Mustang", "Mitsubishi, AB7663PL, Lancer", and "Toyota, XY237ZT, Corolla". The "Samuel, HARRIS, (05/11/1978)" entity is selected with a checkmark.

A green callout bubble points to the dialog box with the text: "The Title can be edited and a description added (or edited) Document Entities can be selected to append the attachment to."

Add or edit Attachment description or title  
Append the Attachment to any of the Document's Entities. The Attachment is added to the selected Entity(s) profile.



1. To view an Attachment in the Preview pane select it from the listing.
2. Expand Attachment opens it in a new tab at full screen
3. Download the Attachment (showing in the preview) to save a copy



Entity Extraction Links Notes & Tags **Attachments** Document Users Document: Initial Report Vehicle Collision Riverton

Attachment Preview  
Honda CRV.png

Expand Download

Search attachment ... Import

Title	Description	File Type	Actions
Honda CRV.png	Samuel Harris car	PNG	✎ ✕ ...
Initial Occurrence - Report ...	Source Document	DOCX	✎ ✕ ...

Click on Attachment from the listing to view it in the Preview pane



# Recommended next Topic Search Document & Entities

*Make the Connection*