



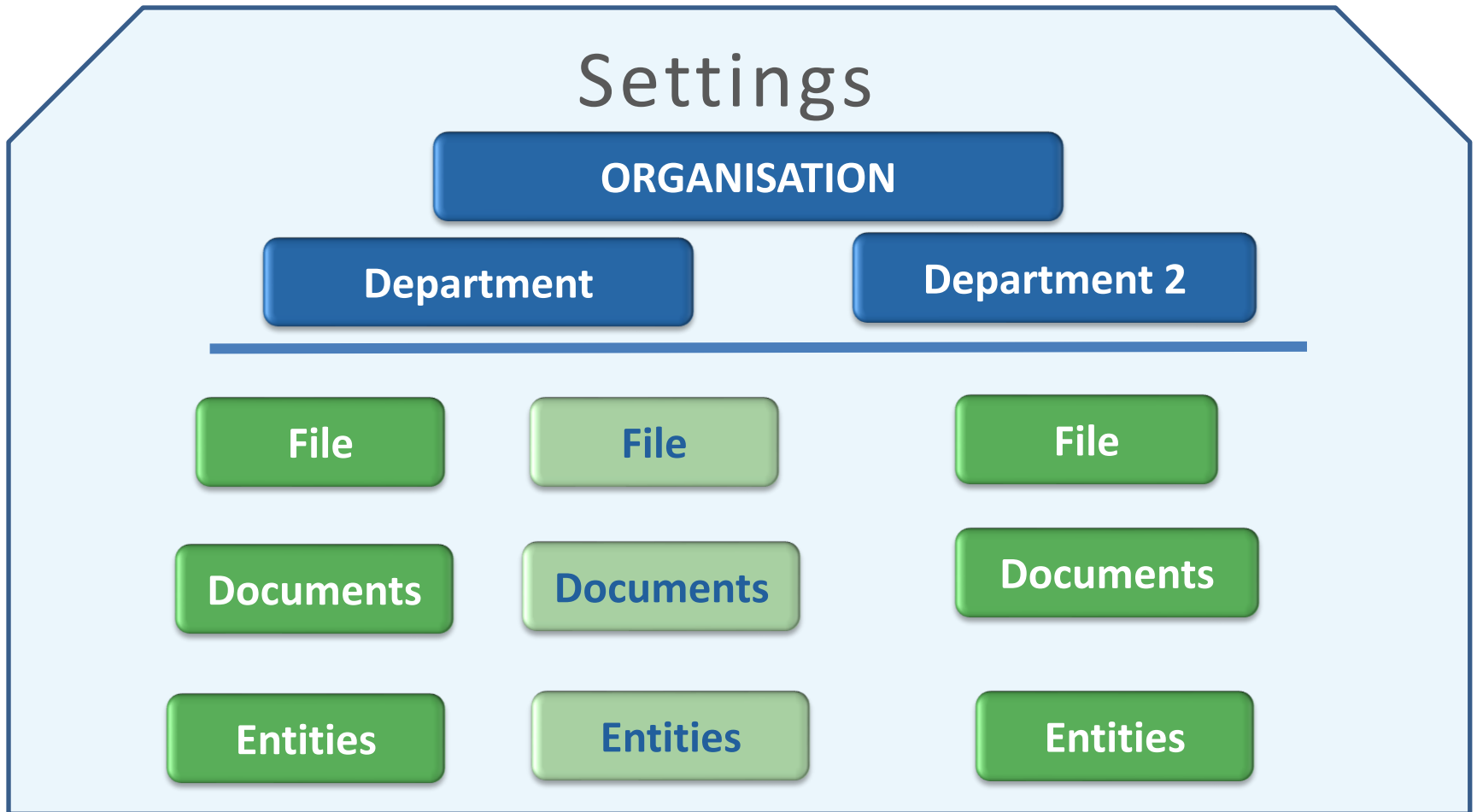
ModalConnect User Training

Files

Make the Connection

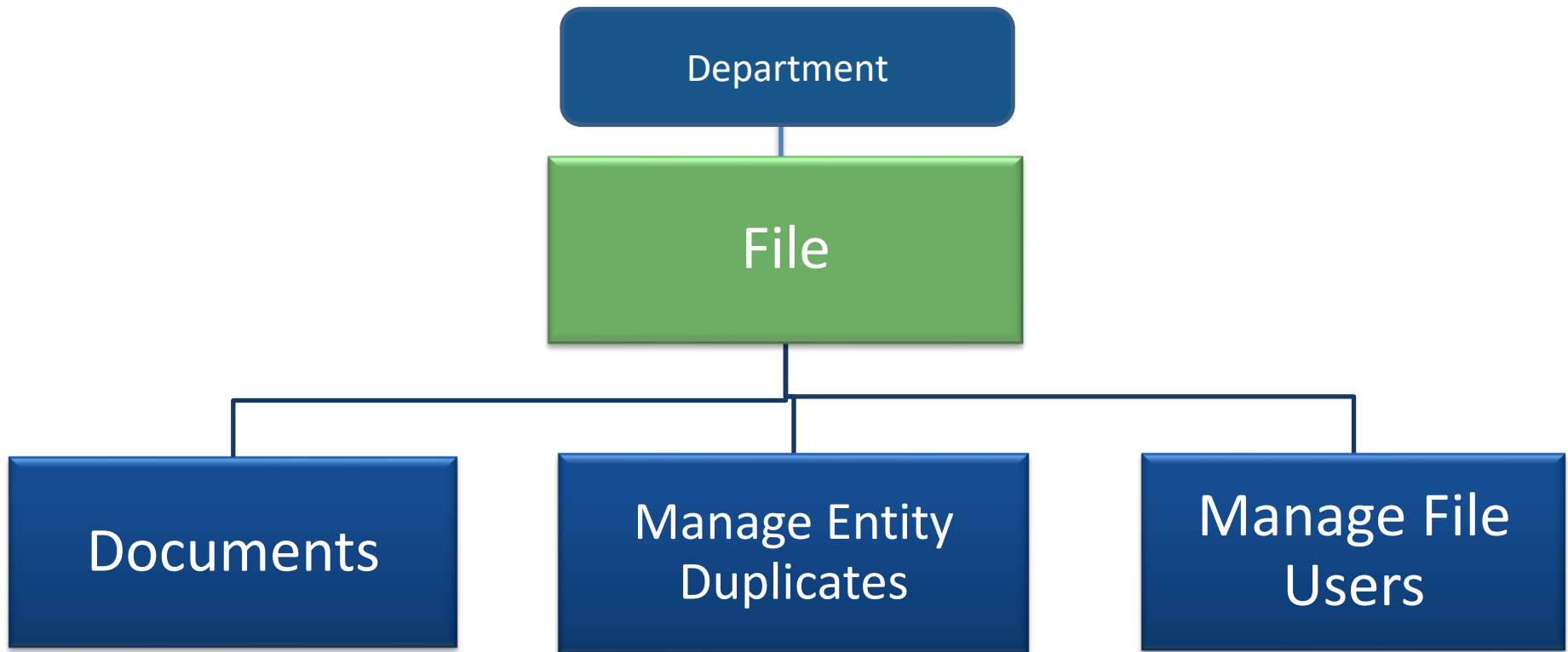


This Reference Guide focuses on the File module and can be used in conjunction with the 'User Training Exercises' resources.





The Files 'parent' link is to a Department.
The File provides a repository for Documents.







A new File can be added either from the Department File page or via the 'new' button on the Main Menu - Add New > File

The File details include a Title, select the Department it belongs to, Type, Level, Deadline (optional), Visibility (public or private), Status, Contacts, Contact message and check boxes to show the File name and Entity or File name in email requests.

Add File
✕

 Save
✕ Cancel
 Finish

<p>Title</p> <input style="width: 95%;" type="text"/>	<p>Department</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select department ▾ </div>
<p>Number prefix</p> <input style="width: 95%;" type="text"/>	<p>Number suffix</p> <input style="width: 95%;" type="text"/>
<p>Type</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select a value... ▾ </div>	<p>Level</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select a value... ▾ </div>
<p>Deadline</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> dd/mm/yyyy 📅 </div>	<p>Visibility</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Public ▾ </div>
<p>Status</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select a value... ▾ </div>	<p>Allow File Name Visibility To Non File Users</p> <input type="checkbox"/>

📌 Contact

<p>Primary Contact</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select primary contact ▾ </div>	<p>Secondary Contact</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select secondary contact ▾ </div>
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Contact Message

Show Entity in Request Access Email

Show File in Request Access Email



1. File menu
2. File Details
3. File Action items

The screenshot displays the MODAL CONNECT interface for a file record titled "Modal General".

- 1. File menu:** The "Details" tab is selected in the top navigation bar.
- 2. File Details:** The main content area shows the following details:
 - Number:** Pub 202404110003 Pub
 - Department:** ModalOne
 - Type:** Case
 - Level:** Regular
 - Deadline:** Unknown
 - Visibility:** Public
 - Status:** Active (Update)
 - Allow File Name Visibility To Non File Users:**
 - Contact:**
 - Primary Contact:** Joanna.Nolan@modalconnect.com
 - Secondary Contact:** iliam.whittle@modalconnect.com
 - Contact Message:** Send an email to request information about an Entity.
 - Show Entity in Request Access Email:**
 - Show File in Request Access Email:**
- 3. File Action Items:** The right sidebar shows summary statistics:
 - Unlinked Entities:** 70
 - New Documents:** 4
 - Incomplete Documents:** 30
 - Potential Duplicate Entities:** 30



1. File Documents Action items list
2. Click on Document detail to view the content in the Preview pane
3. Document list filters to search for a Document from list.
4. Clear Filters – Show All

The screenshot displays the Modal Connect File Documents interface. The top navigation bar includes 'Search', '+ New', 'View', and 'Analytics'. The main header shows 'Title: Modal General'. Below this, there are tabs for 'Details', 'Documents', 'Duplicates', and 'Users'. The 'Documents' tab is active, showing a list of documents with columns for 'Document Title', 'Document Number', and 'Document Type'. A search bar is visible at the top right. On the left, there is a 'My Recent Files' sidebar. The main content area shows a list of documents, with the first document selected and its details displayed in a preview pane on the right. Red circles and numbers 1-4 highlight specific UI elements: 1 points to the 'Documents' tab, 2 points to the 'Selected Document Preview' pane, 3 points to the 'Document Category' filter, and 4 points to the 'Clear Filters' button.

Document Title	Document Number	Document Type
Mount Everest summit by Hillary...	2025100011	REPORT
DRAFT Report	2025090001	DRAFT Report
DRAFT Report	2025090001	DRAFT Report
DRAFT Report	2025090001	DRAFT Report
Report Contact Report Benjami...	2025080028	REPORT
Report Contact Report Benjami...	2025080028	REPORT
Modal - 18Nov24 Finalised	2024110087	REPORT
Modal - 18Nov24 Finalised	2024110087	REPORT
ModalConnect - Surveillance Lo...	2024110033	REPORT
ModalConnect - Surveillance Lo...	2024110033	REPORT

Selected Document Preview: Mount Everest summit by Hillary and Tenzing

Mt Everest first successful ascent by Tenzing and Hillary, 1953

Main article: [1953 British Mount Everest expedition](#)

In 1953, a ninth British expedition of Mount Everest, led by [John Hunt](#), returned to Nepal. Hunt selected two climbing pairs to attempt the summit Mount Everest

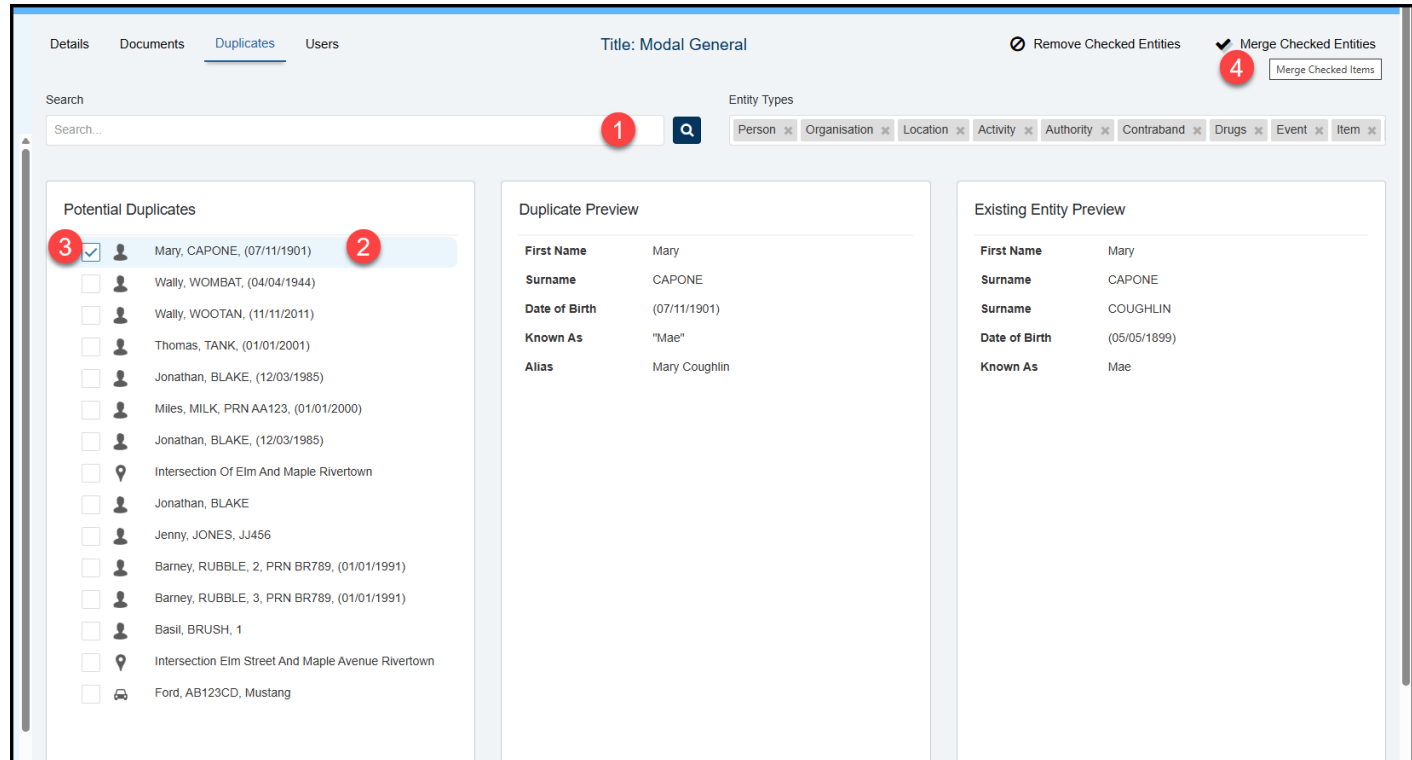
The first, [Tom Bourdillon](#) and [Charles Evans](#), came within 100 m (330 ft) of the summit on 26 May 1953, but turned back after running into oxygen problems. As planned, their work in routefinding, breaking trail and oxygen caches were of great aid to the following pair. Two days later, the expedition made its second assault with the second pair: New Zealander [Edmund Hillary](#) and [Tenzing Norgay](#), a Nepali [Sherpa](#) climber.

They reached the summit at 11:30 am local time on 29 May 1953 via the South Col route. At the time, both acknowledged it as a team effort by the whole expedition, but Tenzing revealed a few years later that Hillary had put his foot on the summit first.^[113] They took photos and buried sweets and a small cross in the snow before



The File Duplicates page shows Entities that are potential Duplicates of existing Entities. These can be reviewed and duplicate Entity merged into the existing Entity.

1. Search field
Type filter
2. Select the
Entity to view
to preview
their properties
and review
against the
Existing Entity
3. Click the
checkbox to
select a
Potential
Duplicate
Entity to Merge
4. Click the
'Merge
Checked Items'
to merge
duplicates



The screenshot shows the 'File Duplicates' interface. At the top, there are tabs for 'Details', 'Documents', 'Duplicates', and 'Users'. The title is 'Modal General'. On the right, there are two toggle buttons: 'Remove Checked Entities' (disabled) and 'Merge Checked Entities' (checked). Below these is a 'Merge Checked Items' button, highlighted with a red circle and the number 4.

A search bar is located on the left, highlighted with a red circle and the number 1. To its right are 'Entity Types' filters: Person, Organisation, Location, Activity, Authority, Contraband, Drugs, Event, and Item.

The main area is divided into three panels:

- Potential Duplicates:** A list of entities with checkboxes. The first item, 'Mary, CAPONE, (07/11/1901)', is selected (checkbox checked) and highlighted with a red circle and the number 2. A red circle with the number 3 is next to the checkbox.
- Duplicate Preview:** A table showing details for the selected entity:

First Name	Mary
Surname	CAPONE
Date of Birth	(07/11/1901)
Known As	"Mae"
Alias	Mary Coughlin
- Existing Entity Preview:** A table showing details for an existing entity:

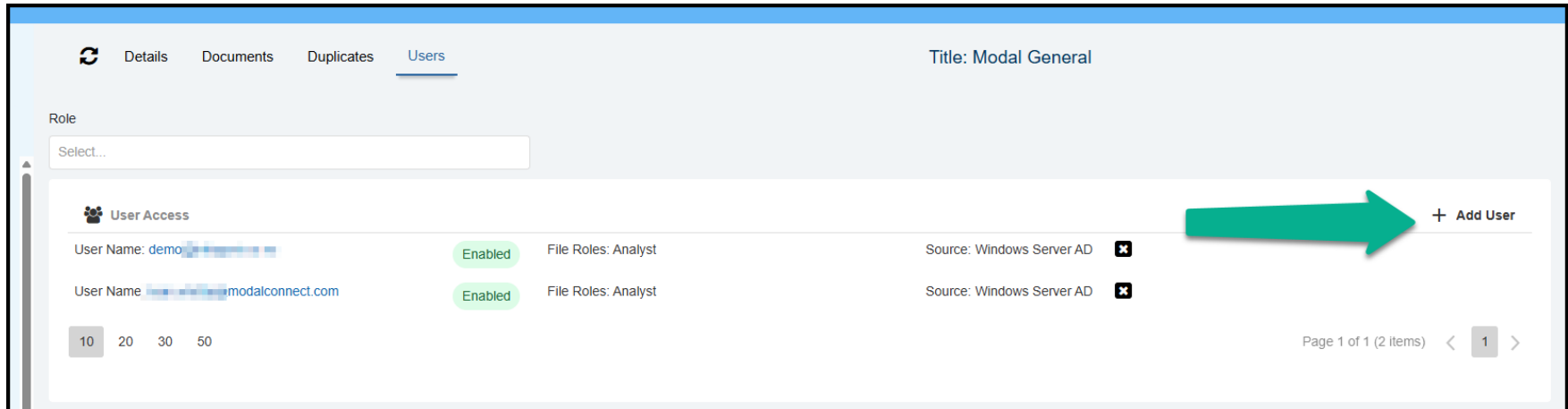
First Name	Mary
Surname	CAPONE
Surname	COUGHLIN
Date of Birth	(05/05/1899)
Known As	Mae



Select Users from the File menu

Existing File members are listed

File users can be added by clicking the Add User button, select the User and assign a role.



Details Documents Duplicates Users Title: Modal General

Role
Select...

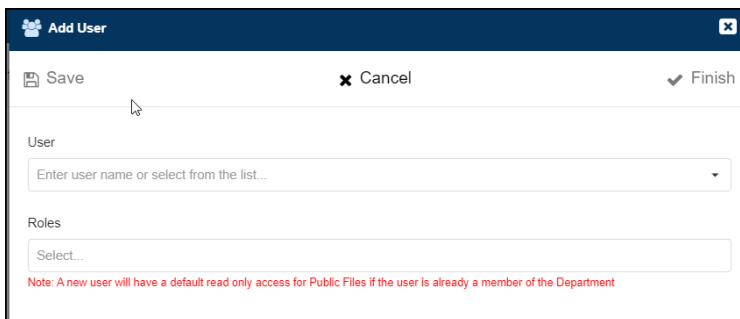
User Access

User Name: demo	Enabled	File Roles: Analyst	Source: Windows Server AD
User Name: modalconnect.com	Enabled	File Roles: Analyst	Source: Windows Server AD

10 20 30 50

Page 1 of 1 (2 items) < 1 >

+ Add User



Add User

Save Cancel Finish

User
Enter user name or select from the list...

Roles
Select...

Note: A new user will have a default read only access for Public Files if the user is already a member of the Department

Note: Only Users that are a member of the (parent) Department can be added to the File.



Recommended next topic;
Documents

Make the Connection