



# ModalConnect User Training

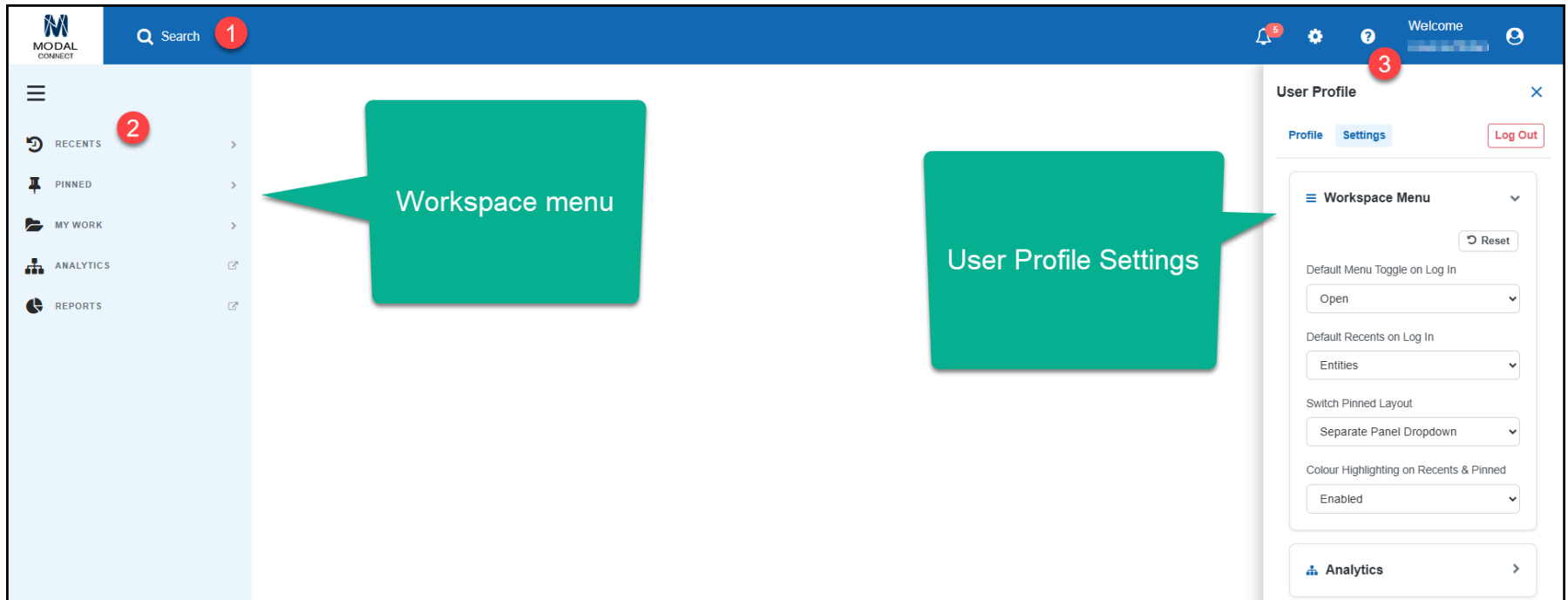
## Navigation & Menus

*Make the Connection*



Note: Menu items available may vary depending on your User Role permissions

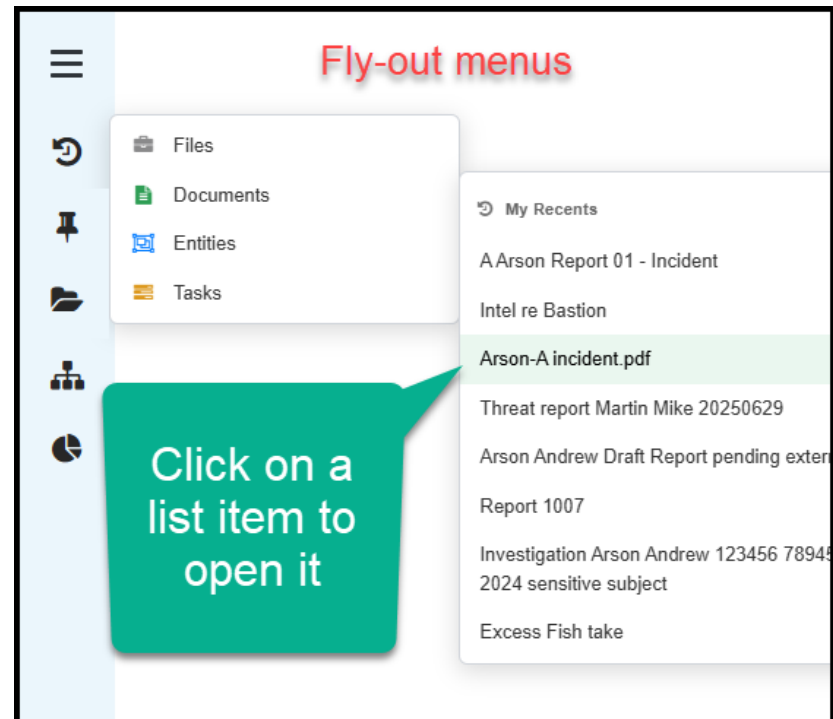
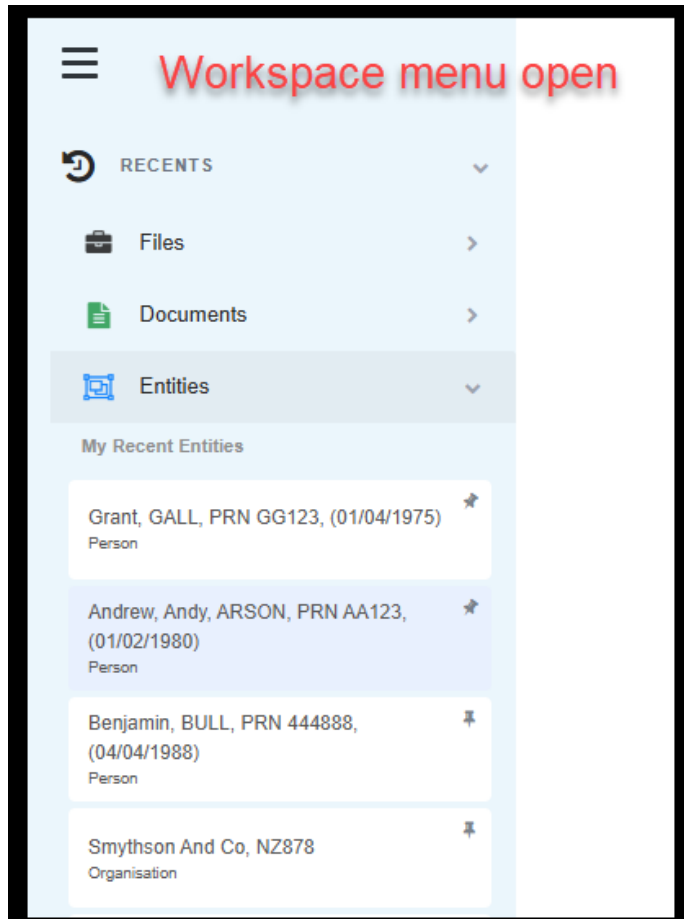
1. Search; select to open the Search page
2. User menu; Notifications, Settings (Administrators), Help Centre and your User Profile
3. Workspace menu

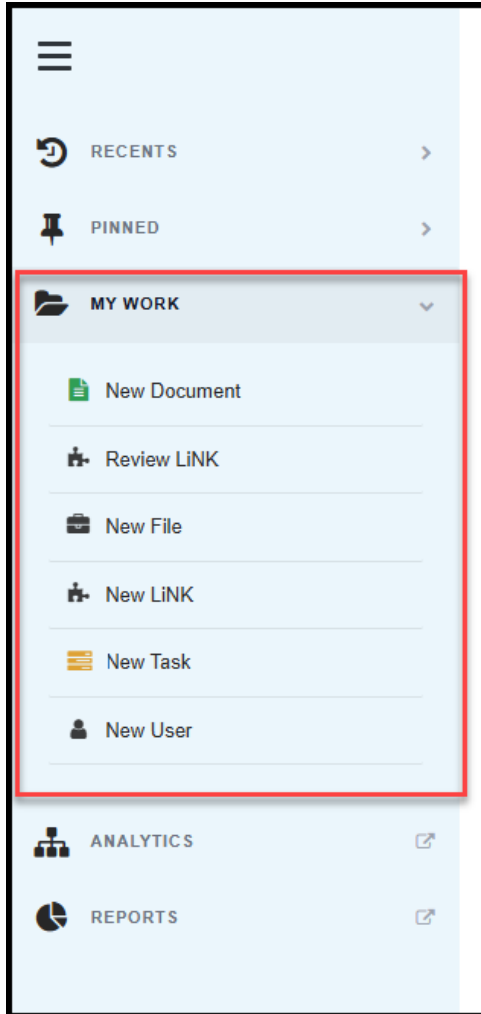


The screenshot displays the ModalConnect user interface. At the top left is the Modal Connect logo. A search bar is located in the top navigation bar, marked with a red circle '1'. The left sidebar contains a 'Workspace menu' with items: RECENTS (marked with a red circle '2'), PINNED, MY WORK, ANALYTICS, and REPORTS. A green callout box labeled 'Workspace menu' points to this sidebar. The top right navigation bar includes a notification bell (5), a settings gear, a help icon (2), and a 'Welcome' message. A red circle '3' is placed over the user profile icon. A 'User Profile' dropdown menu is open, showing 'Profile' and 'Settings' tabs, and a 'Log Out' button. The 'Settings' tab is active, displaying a 'Workspace Menu' section with a 'Reset' button and several dropdown options: 'Default Menu Toggle on Log In' (Open), 'Default Recents on Log In' (Entities), 'Switch Pinned Layout' (Separate Panel Dropdown), and 'Colour Highlighting on Recents & Pinned' (Enabled). A green callout box labeled 'User Profile Settings' points to this settings panel. At the bottom of the sidebar, there is an 'Analytics' link with a right-pointing arrow.



The Workspace menu can be opened or closed by clicking on the 3 bars at the top. When closed, hover over a menu button to access fly-out menus and lists. Clicking on a list item opens the related File, Document, Entity or Task.

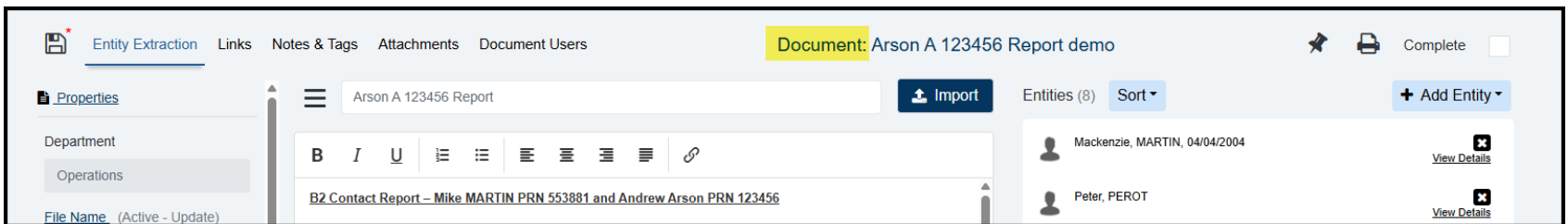
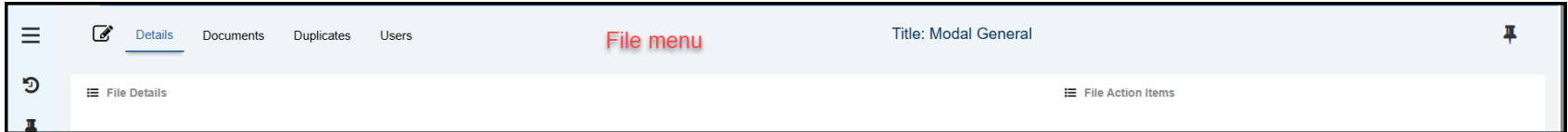




The My Work menu is where you start to add a new File, Document, Task, LiNK form, User or review LiNK submissions. Click on the label to open the related new item page, window or to review LiNK submissions. These options can also be actioned from the Fly-out menu.



Files, Documents and the Entity Profile pages and edit functions show as a top menu. The current page title being viewed shows in blue and underlined.

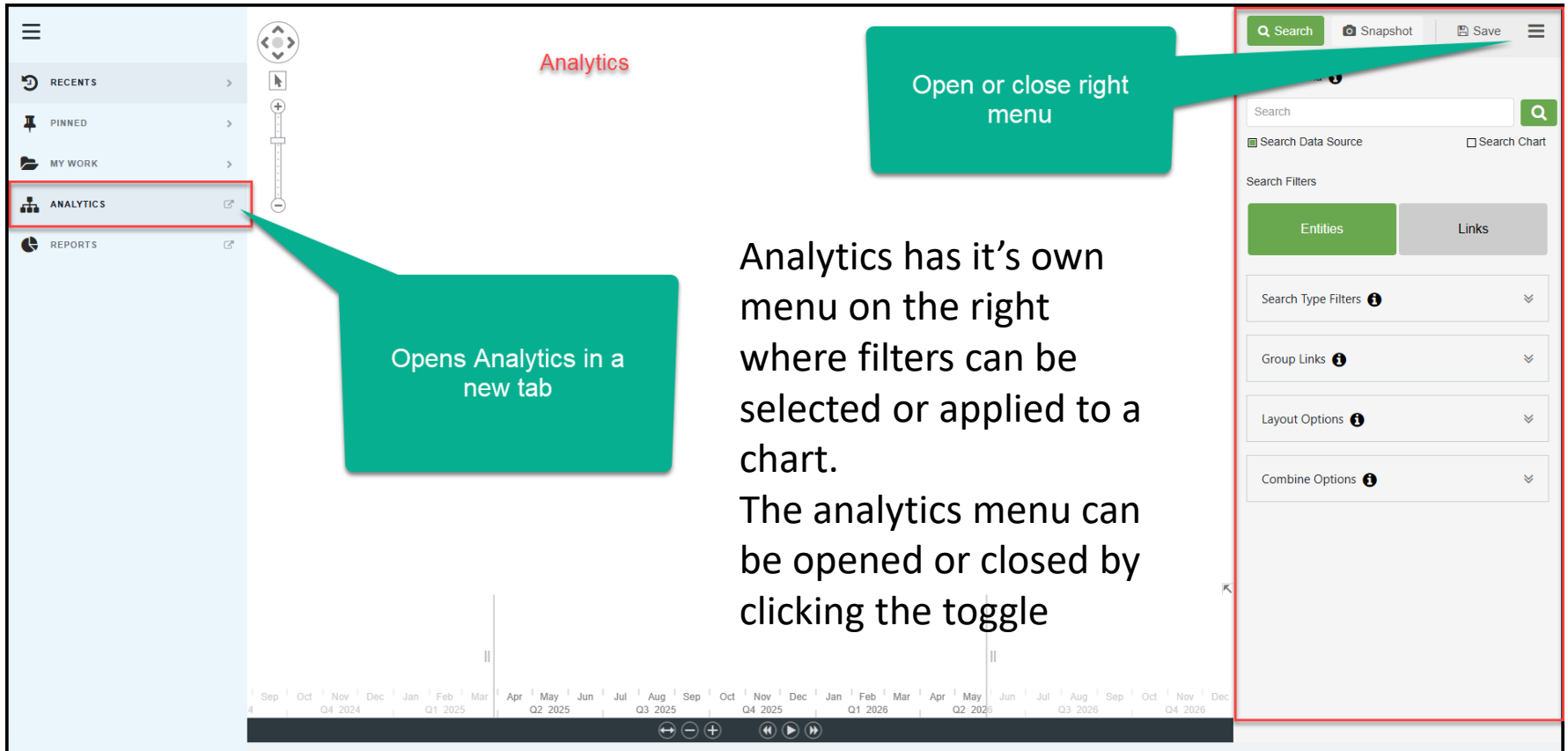




A Document must be in Edit mode to enable editing and navigation functions

Document Entities and Suggested Entities have a 'View Details' button (in Edit mode)

Right click on a Document Entity and select 'Go to Entity Profile' to open the Entity Profile (in a new tab)



**Analytics**

Opens Analytics in a new tab

Open or close right menu

Analytics has it's own menu on the right where filters can be selected or applied to a chart. The analytics menu can be opened or closed by clicking the toggle

Search Snapshot Save

Search

Search Data Source Search Chart

Search Filters

Entities Links

Search Type Filters

Group Links

Layout Options

Combine Options

Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec  
Q4 2024 Q1 2025 Q2 2025 Q3 2025 Q4 2025 Q1 2026 Q2 2026 Q3 2026 Q4 2026



Data shown in blue or underlined is hyperlinked. Click to navigate to the selected content or right click to open in a new tab or window.

Links - Visible (15) Total (15) Entity Profile Links

Link Description	Start Date	End Date	Status	Type	Related Entity	Document Title	Document Created	Event Date
was Located at	01/05/2021		Confirmed		<a href="#">Somerset Prison</a> <span style="color: red;">select to view related entity</span>	<a href="#">IR Template.doc</a> <span style="color: red;">select to open the Document</span>	27/02/2026	
was Visited by	04/10/2025	04/10/2025	Confirmed		Patrick, PIRATE	<a href="#">IR Template.doc</a>	27/02/2026	
is a known Associate of			Confirmed		Benjamin, BULL, 04/04/1994, PRN 44488	<a href="#">Contact Report B-Wing</a>	30/01/2026	

Search

Source Filter: [Entity Profile](#) [Document Header](#) [Document Content](#) [Document Properties](#) [Document Attachment](#) [Entity Note Content](#) [Entity Attachment](#) [7 more](#)

Search Types: [Address](#) [Location](#) [Organisation](#) [Person ID](#) [Person Names](#) [Phone number](#)

Date	Type	Document/Entity Title	File Title
10/10/2024	<a href="#">Document Content</a>	<a href="#">A Riot Risk Oct 24.docx</a>	<a href="#">Active Investigations</a>
10/12/2024	<a href="#">Document Content</a> <span style="color: red;">Linked to content</span>	<a href="#">All Documents Today test</a> <span style="color: red;">Linked to Document or Entity profile</span>	<a href="#">Operation T</a> <span style="color: red;">Linked to File</span>
30/01/2026	Entity Note Content	Andrew, ARSON, 15/05/1985, PRN AA123456	

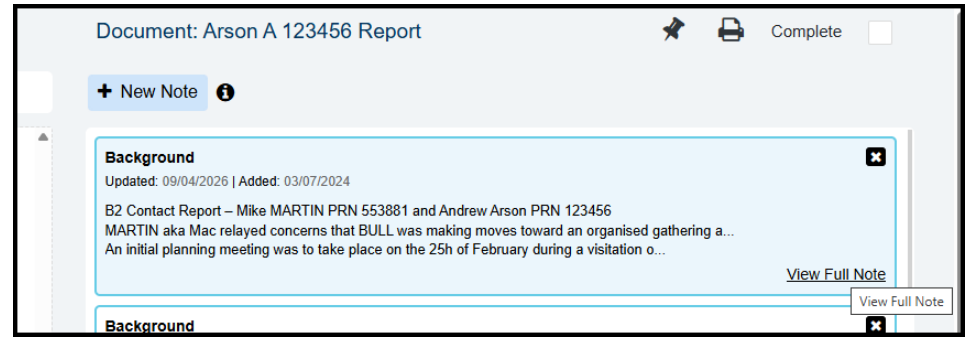
Document/Entity Title	File Title
<a href="#">A Riot Risk Oct 24.docx</a>	<a href="#">Active Investigations</a>
<a href="#">All Documents Today test</a>	<a href="#">Operation T</a>
<a href="#">Andrew, ARSON, 15/05/1985, PRN AA123456</a>	
<a href="#">Andrew, ARSON, 15/05/1985, PRN AA123456</a>	

- Open link in new tab
- Open link in split view
- Open link in new window
- Open link in incognito window

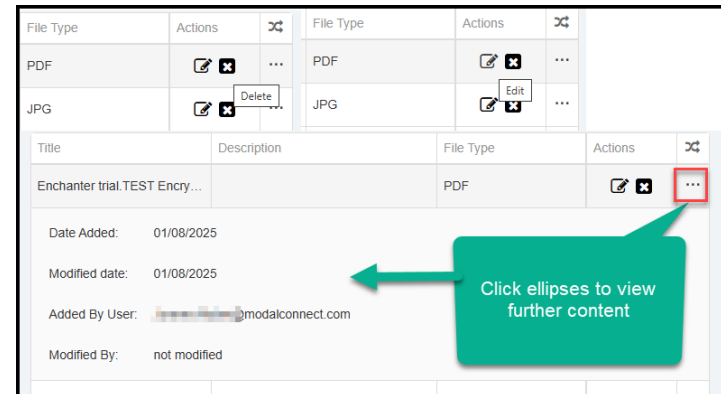
Right click on link to open content in a new tab



Entities, Notes and Attachments have a 'View' button

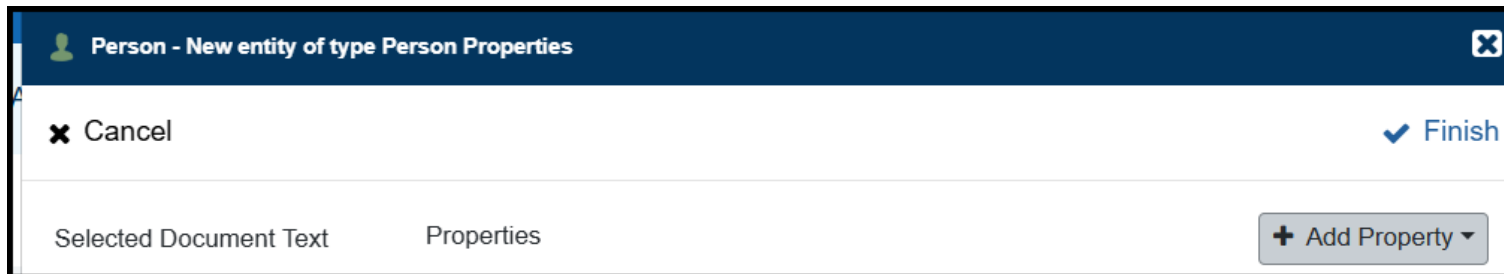


Edit, Add and Delete functions may appear as a button, icon or label.



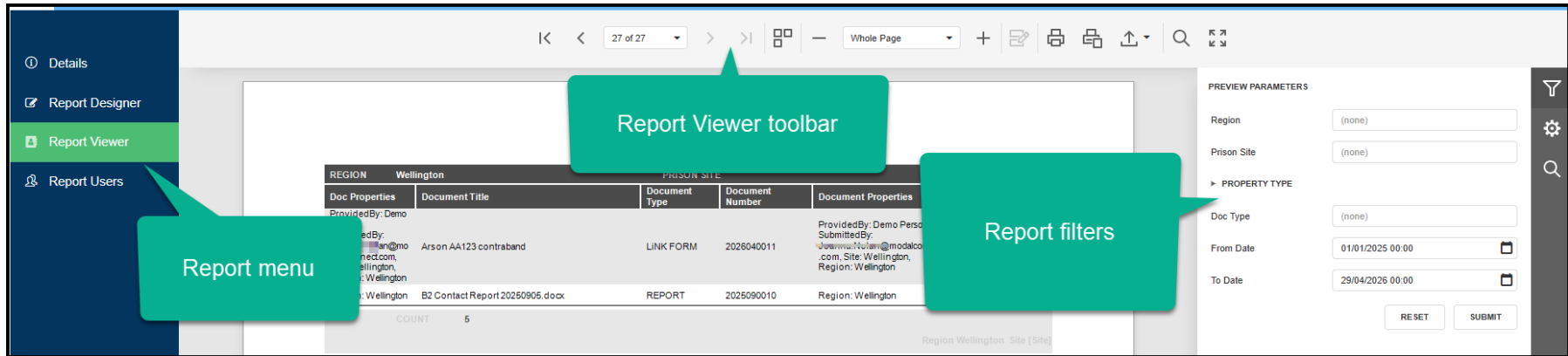
Clicking Finish will both save new or edited data and close the panel

Cancel closes the panel without saving any changes





A Report when opened has it's own menu to open Report pages, toolbars and filters.

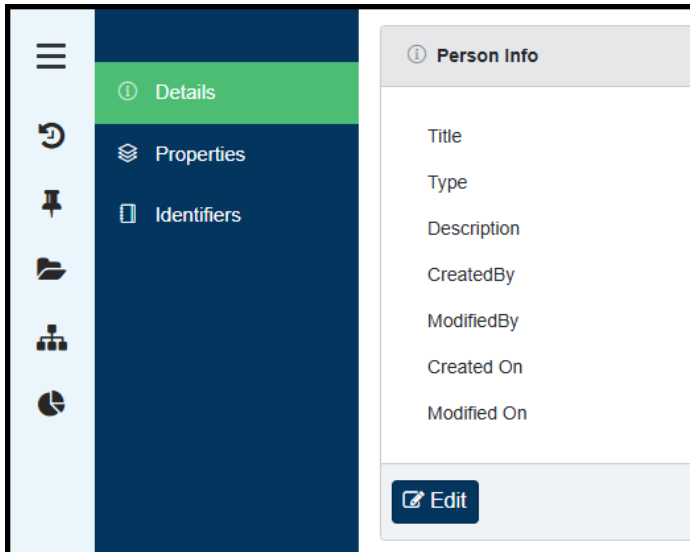
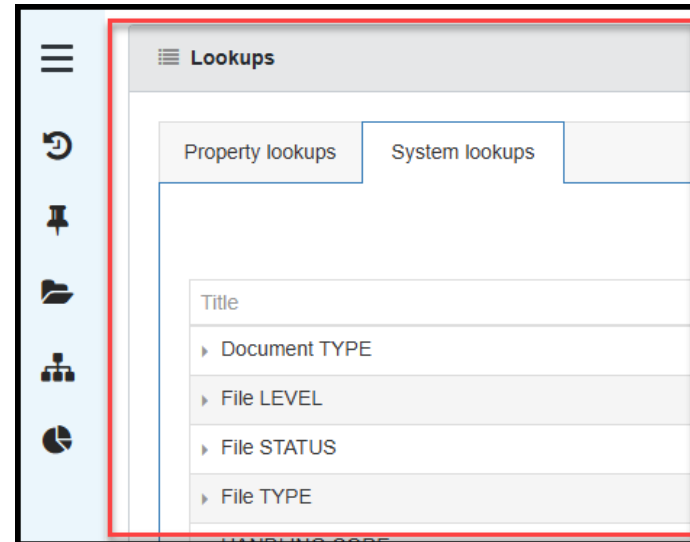


The screenshot shows the Report Viewer interface. On the left is a dark blue sidebar with a 'Report menu' containing 'Details', 'Report Designer', 'Report Viewer' (highlighted), and 'Report Users'. At the top is a 'Report Viewer toolbar' with navigation and printing icons. The main area displays a report table with columns: REGION, Doc Properties, Document Title, Document Type, Document Number, and Document Properties. The table shows data for Wellington and B2 Contact Report 20250905.docx. On the right is a 'Report filters' panel with 'PREVIEW PARAMETERS' including Region, Prison Site, PROPERTY TYPE, Doc Type, From Date, and To Date, with 'RESET' and 'SUBMIT' buttons.

REGION	Doc Properties	Document Title	Document Type	Document Number	Document Properties
Wellington	Doc Properties	Arson AA123 contraband	LINK FORM	2026040011	ProvidedBy: Demo Person SubmittedBy: Johnnie Nolan@modalconnect.com, Site: Wellington, Region: Wellington
Wellington		B2 Contact Report 20250905.docx	REPORT	2025090010	Region: Wellington
		COUNT	5		



Settings items vary from Tables, lists or separate menus

Tags Configuration

[+ New](#) [Delete Selected](#)

	<input type="checkbox"/>	Tag Name	↑	Order	Documents	Document Notes	Entities
		q					
⋮		Threat		1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



## Recommended next Topic Documents

*Make the Connection*