



ModalConnect User Training

Navigation & Menus

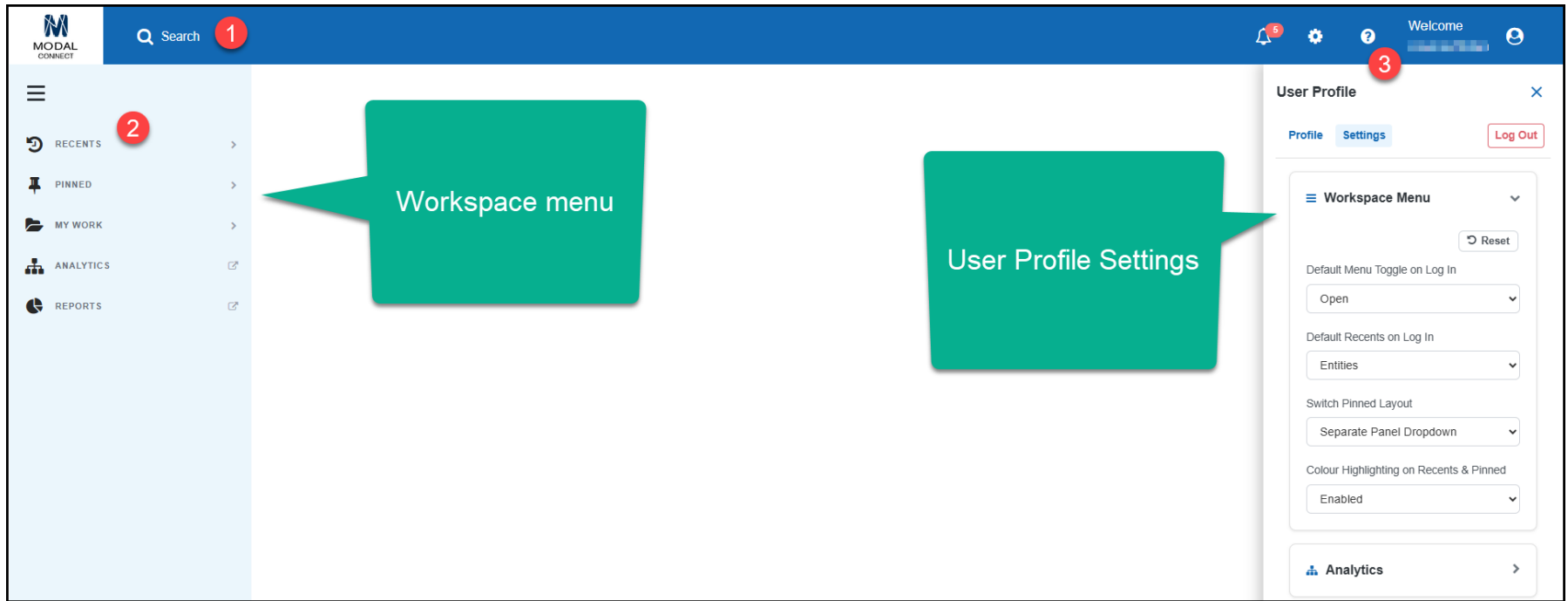
Make the Connection





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 shows the Modal Connect interface with three numbered annotations:

- 1**: Points to the Search bar in the top navigation bar.
- 2**: Points to the Workspace menu in the left sidebar, which includes options like RECENTS, PINNED, MY WORK, ANALYTICS, and REPORTS.
- 3**: Points to the User Profile dropdown menu in the top right corner, which includes options like Profile, Settings, and Log Out.

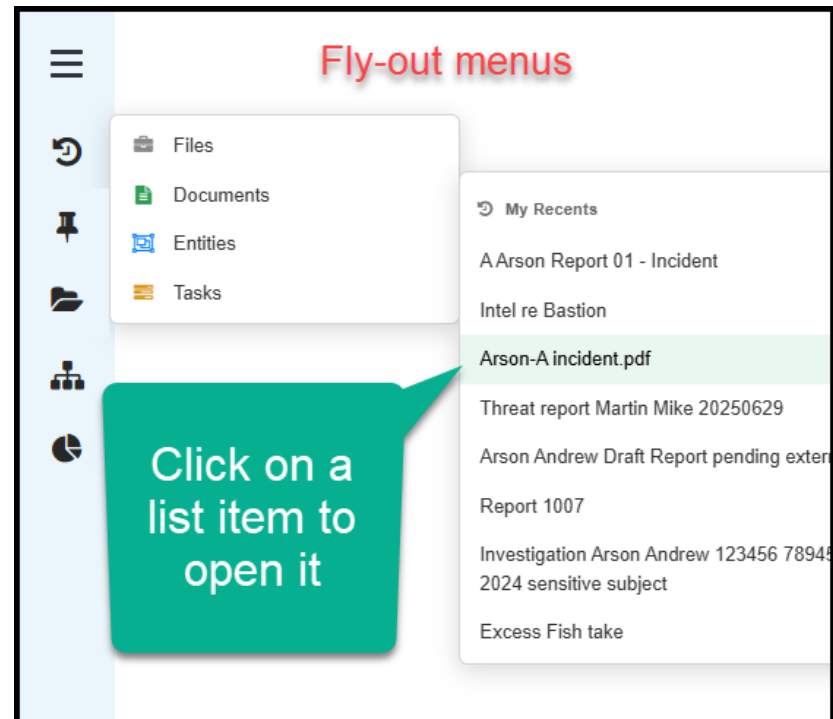
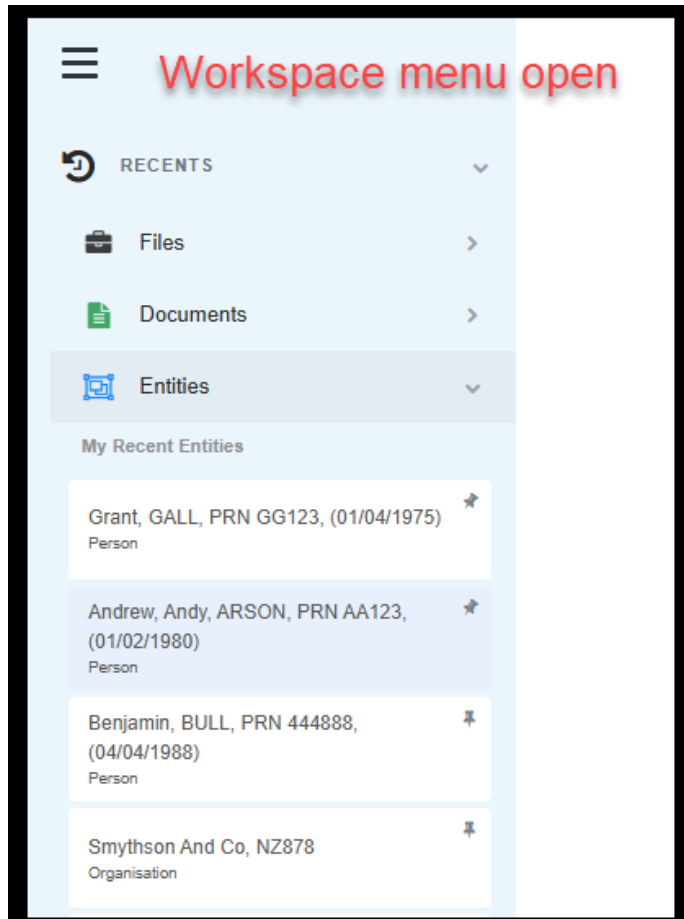
Two green callout boxes highlight specific features:

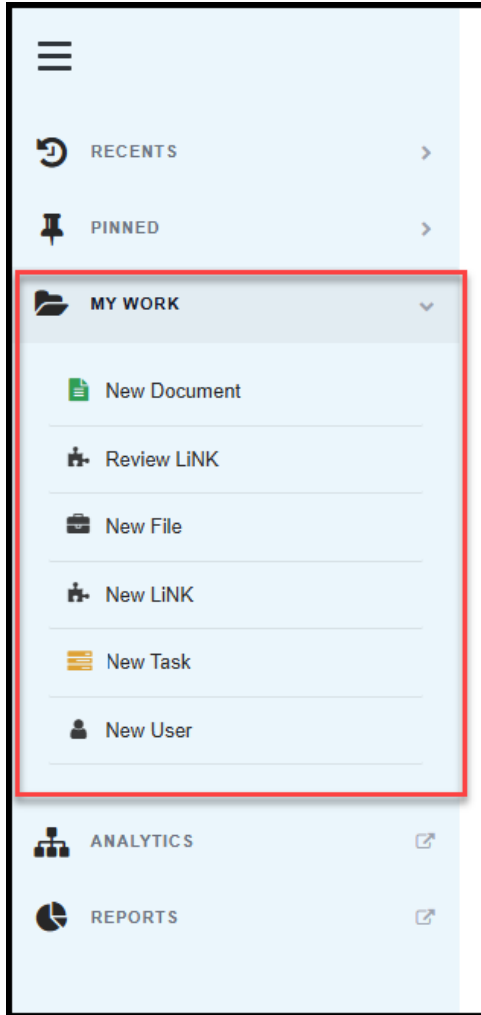
- Workspace menu**: A green box pointing to the left sidebar menu.
- User Profile Settings**: A green box pointing to the User Profile dropdown menu.

Workspace menu



The Workspace menu can be opened or closed by toggling the 3 bars at the top. When collapsed, 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.

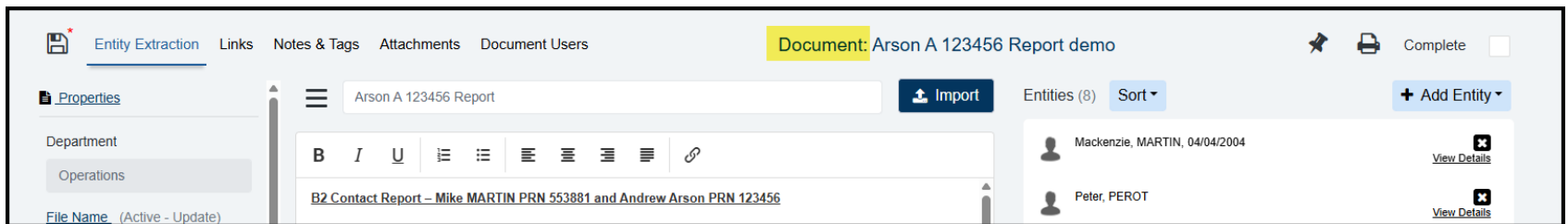
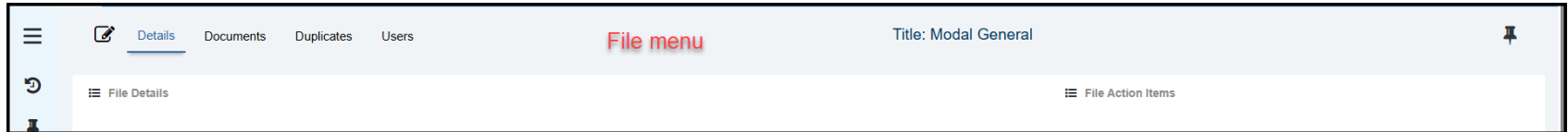




The My Work menu is where you start to add a new File, Document, Task, LiNK form, User or review LiNK submissions. Click on the label to open the related new item page, window or to review LiNK submissions. These options can also be actioned from the Fly-out menu.

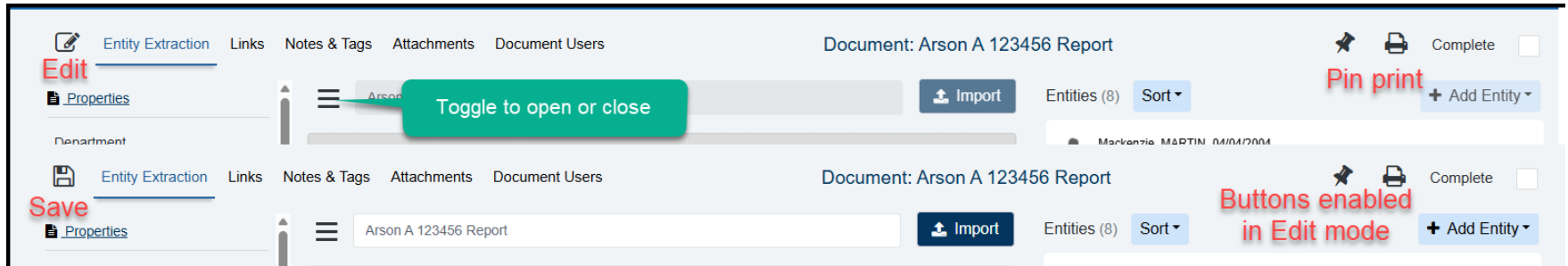


Files, Documents and the Entity Profile pages and edit functions show as a top menu. The current page title being viewed shows in blue and underlined.





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



Document: Arson A 123456 Report

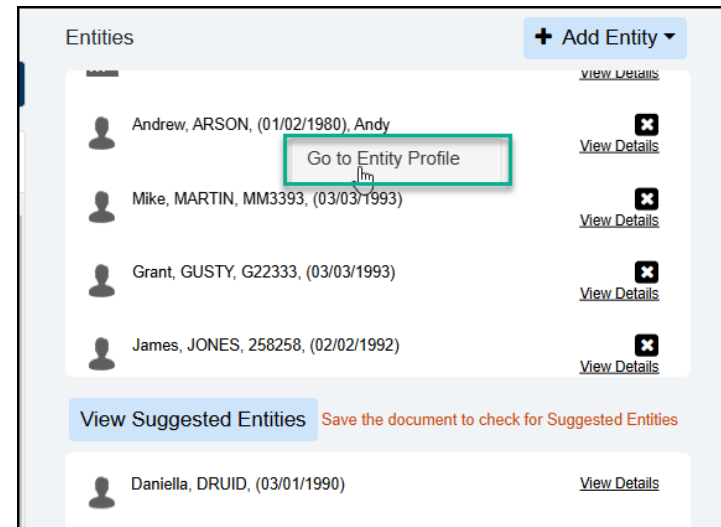
Complete ☐

Pin print

Buttons enabled in Edit mode

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)



Entities

+ Add Entity

Andrew, ARSON, (01/02/1980), Andy	Go to Entity Profile	View Details
Mike, MARTIN, MM3393, (03/03/1993)		View Details
Grant, GUSTY, G22333, (03/03/1993)		View Details
James, JONES, 258258, (02/02/1992)		View Details

View Suggested Entities Save the document to check for Suggested Entities

Daniella, DRUID, (03/01/1990)	View Details
-------------------------------	--------------



The screenshot shows the Modal Connect Analytics interface. On the left, a sidebar contains navigation items: RECENTS, PINNED, MY WORK, ANALYTICS (highlighted with a red box and a green callout), and REPORTS. A green callout points to the ANALYTICS item, stating "Opens Analytics in a new tab". The main area is titled "Analytics" in red. On the right, a right-hand menu is open, showing options like Search, Snapshot, and Save, along with search filters and data source selection. A green callout points to this menu, stating "Open or close right menu". Below the main area, a timeline is visible with months from September to December for the years 2024, 2025, and 2026. A green callout points to the right-hand menu, stating "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".

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

Navigate to Linked data



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.

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		Somerset Prison	IR Template.doc	27/02/2026		
was Visited by	04/10/2025	04/10/2025	Confirmed		Patrick, PIRATE	IR Template.doc	27/02/2026		
is a known Associate of			Confirmed		Benjamin, BULL, 04/04/1994, PRN 44488	Contact Report B-Wing	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	Document Content	A Riot Risk Oct 24 docx	Active Investigations	
10/12/2024	Document Content	All Documents Today test	Operation T	
30/01/2026	Entity Note Content	Andrew, ARSON, 15/05/1985, PRN AA123456		

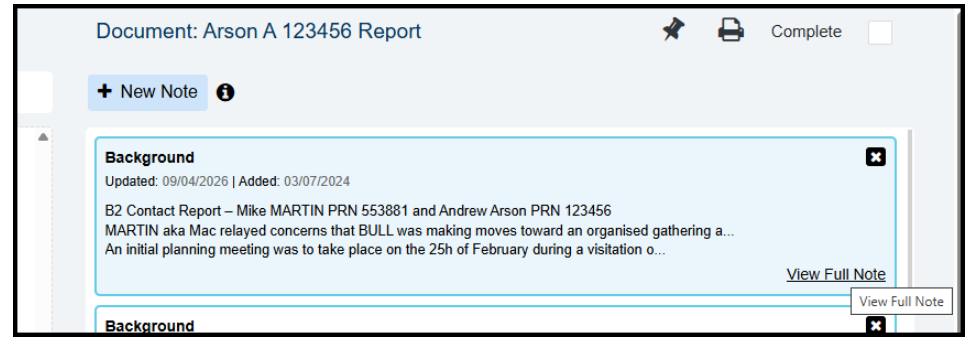
Document/Entity Title	File Title
A Riot Risk Oct 24 docx	Active Investigations
All Documents Today test	Operation T
Andrew, ARSON, 15/05/1985, PRN AA123456	
Andrew, ARSON, 15/05/1985, PRN AA123456	

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

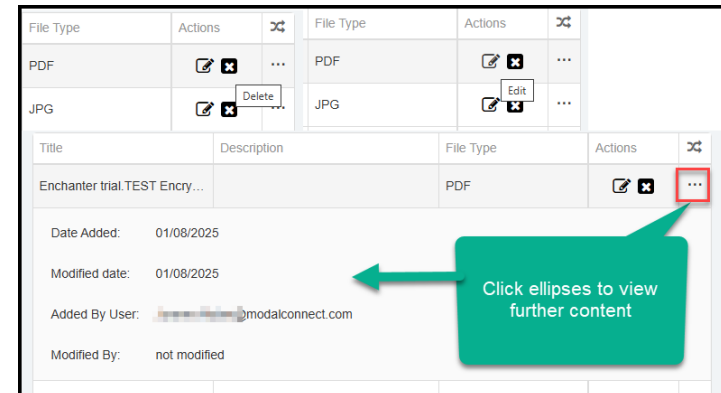
Right click on link to open content in a new tab



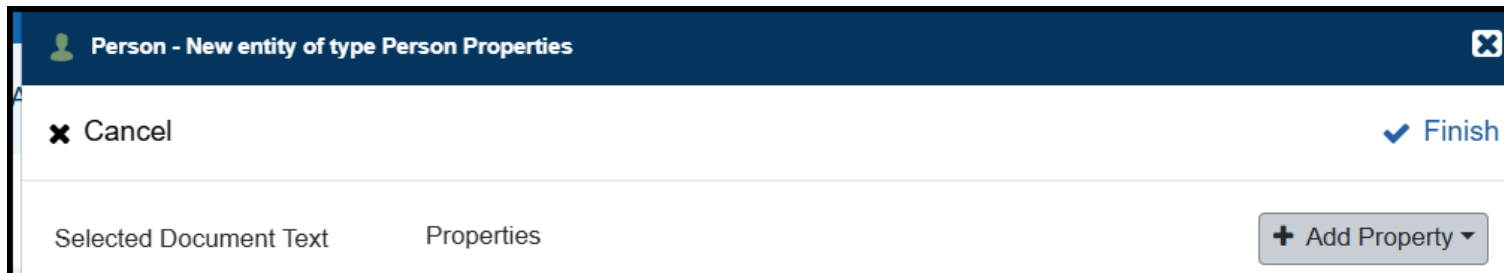
Entities, Notes and Attachments have a 'View' button



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.

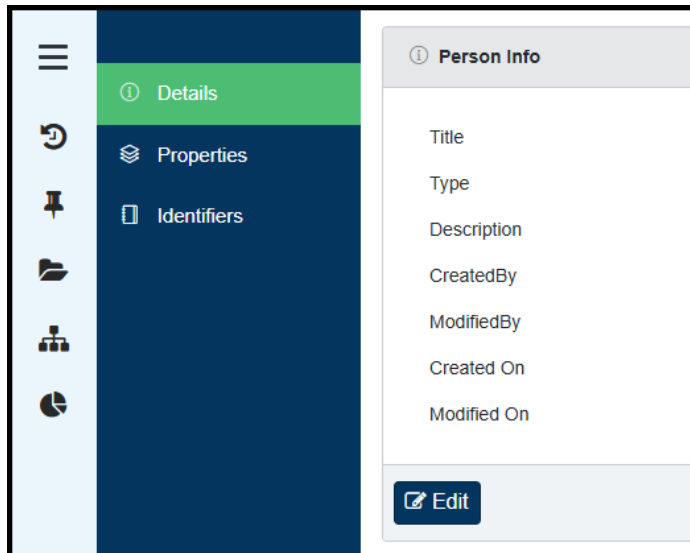
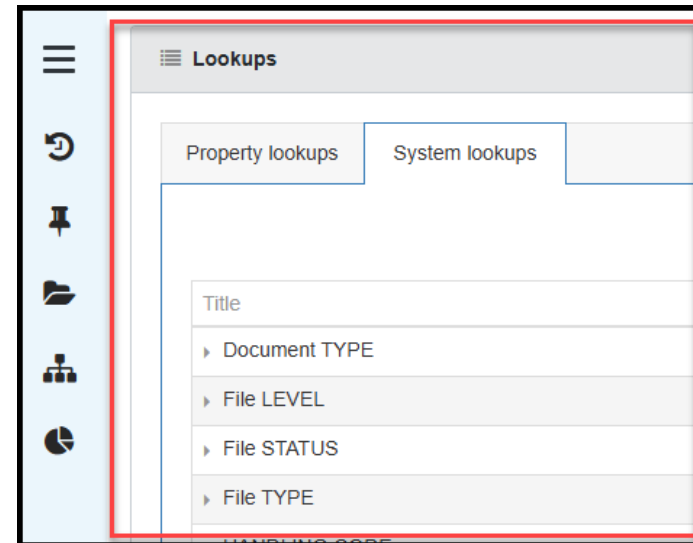
The screenshot shows the Modal Connect Reports interface. On the left is a dark blue sidebar with a 'Report menu' containing 'Details', 'Report Designer', 'Report Viewer' (highlighted), and 'Report Users'. The main area displays a report titled 'REGION Wellington' and 'PRISON SITE'. A 'Report Viewer toolbar' is at the top of the main area, showing navigation and view controls. On the right is a 'Report filters' panel with 'PREVIEW PARAMETERS' including 'Region' (none), 'Prison Site' (none), 'PROPERTY TYPE' (none), 'Doc Type' (none), 'From Date' (01/01/2025 00:00), and 'To Date' (29/04/2026 00:00). The report content includes a table with columns: REGION, Doc Properties, Document Title, Document Type, Document Number, and Document Properties. The table shows two rows of data. A 'COUNT 5' is displayed at the bottom of the table.

REGION	Doc Properties	Document Title	Document Type	Document Number	Document Properties
Wellington	Doc Properties	Arson AA123 contraband	LINK FORM	2026040011	ProvidedBy: Demo Person SubmittedBy: Juanita 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				
	☐	Tag Name	↑	Order	Documents	Document Notes
		Q				Entities
⋮		Threat		1	☒	☒



Recommended next Topic Documents

Make the Connection