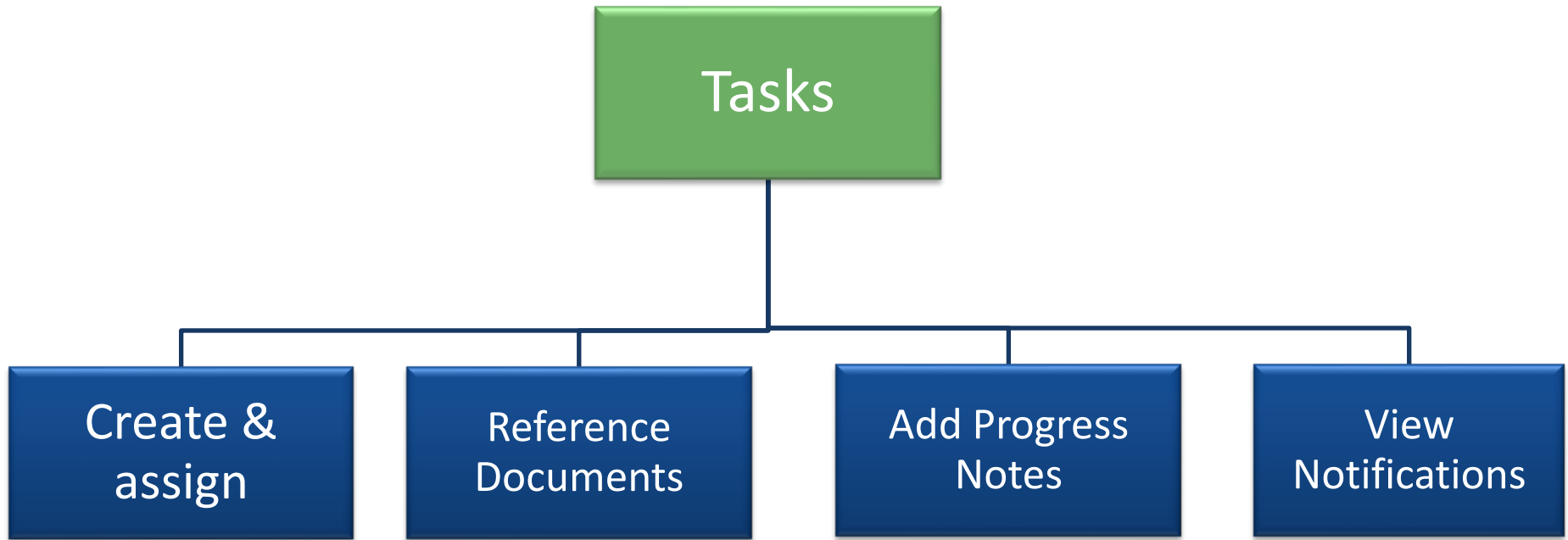




MODAL
CONNECT

ModalConnect User Training Tasks Module

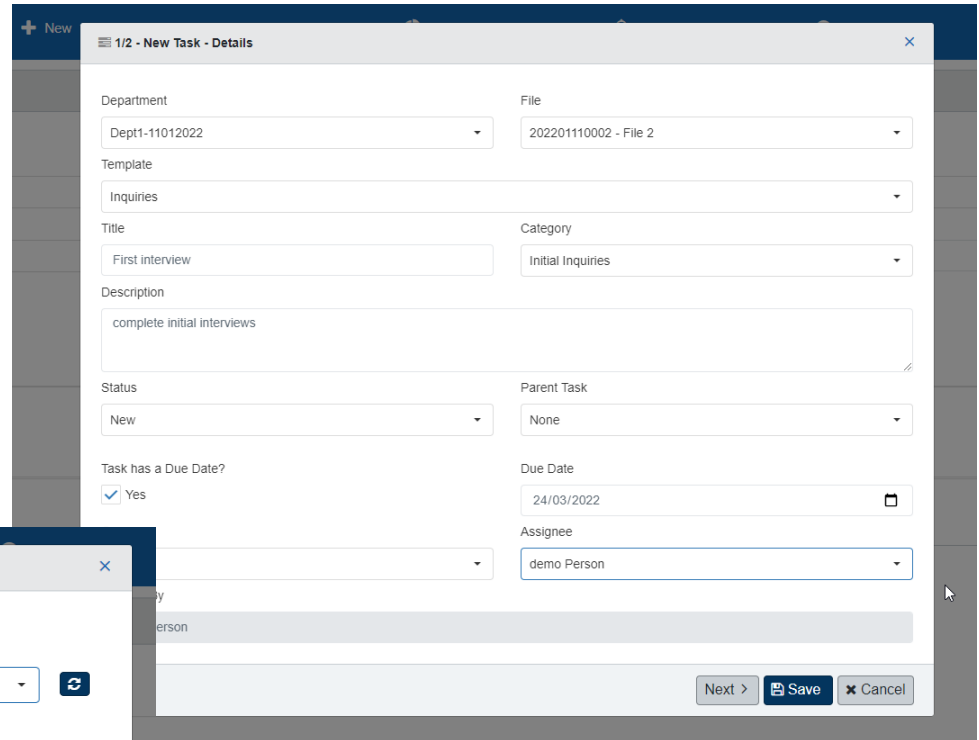
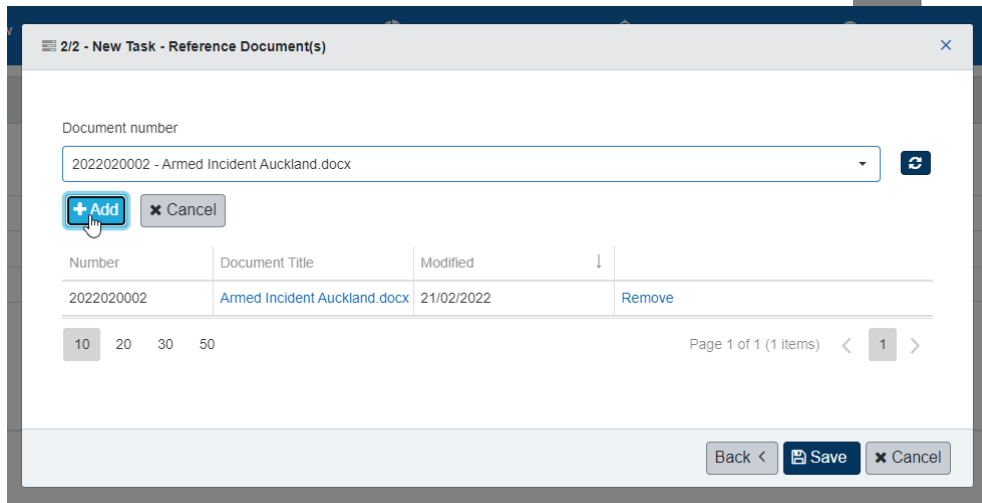
Make the Connection





Tasks can be created, linked to Documents and assigned to Users.

1. Add a Task – select New then New Task and complete the Task details. Assign to yourself.
2. On the Next pane select a Document and add it to the Task for the Assignee to reference.

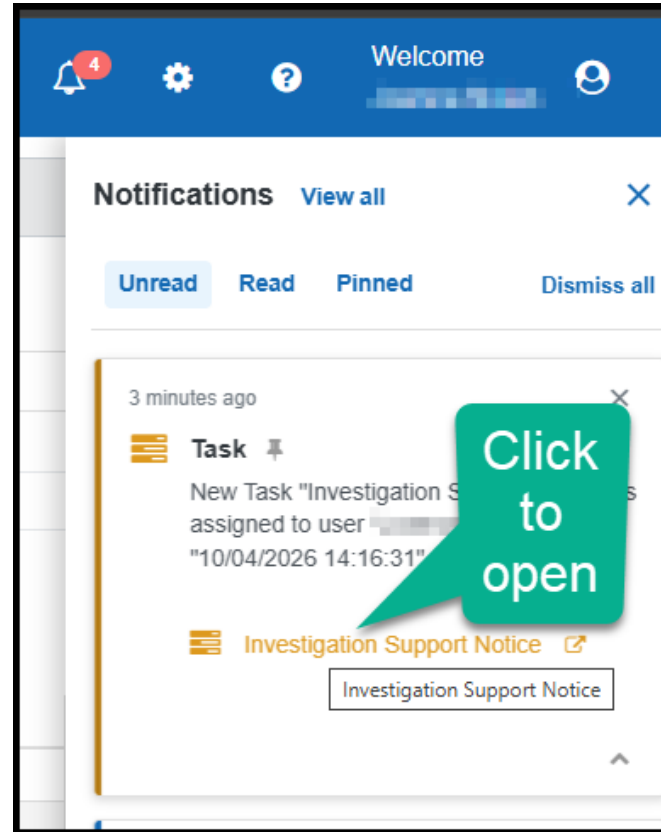
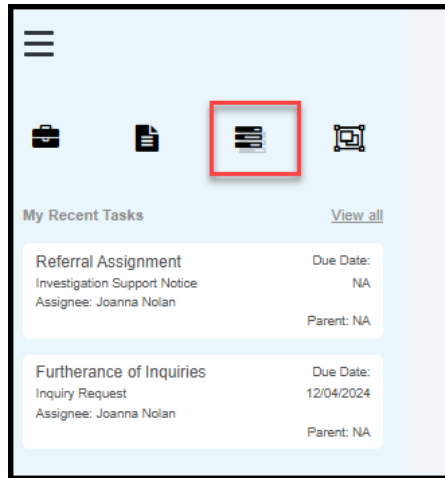



Number	Document Title	Modified	
2022020002	Armed Incident Auckland.docx	21/02/2022	Remove

View Tasks



Tasks can be accessed from the My Recent Tasks list (click to open the Task) or via Notifications. New or updated Tasks are listed under Unread. Expand the tile and click on the Task Title to open.



View Tasks



Select View All from the Notifications pane to view a list of all your Tasks. Click on a Task to open it on the Progress notes pane.

Notification List

Notification Type: Task

From Date: dd/mm/yyyy

To Date: dd/mm/yyyy

Search [Reset]

Message	Notification T...	Creation Date
Task progress is provided for the task "Investigation Support Notice"	Task	10/04/2026 14:24:50
New Task "Investigation Support Notice" is assigned to user "Joanna"	Task	10/04/2026 14:16:31
New Task "Investigation Support Notice" is assigned to user "Joanna"	Task	10/04/2026 14:01:01

Click on a Task to open it.

Or select View All from the My Recent Tasks list to view the Organisation Task list

Organisation Tasks

Department: All

Status: All

File: All

Title: Search title

Search [Reset]

Title	Status	Due Date	Owner	Assignee	Created By	Modified By	Creation Date	Modified On		
Inquiry Request	Active	12/04/2024	[Avatar]	[Avatar]	[Avatar]	[Avatar]	09/04/2024	24/11/2025	Edit	Delete
Investigation Support Notice	New	Unknown	[Avatar]	[Avatar]	[Avatar]	[Avatar]	10/04/2026	10/04/2026	Edit	Delete

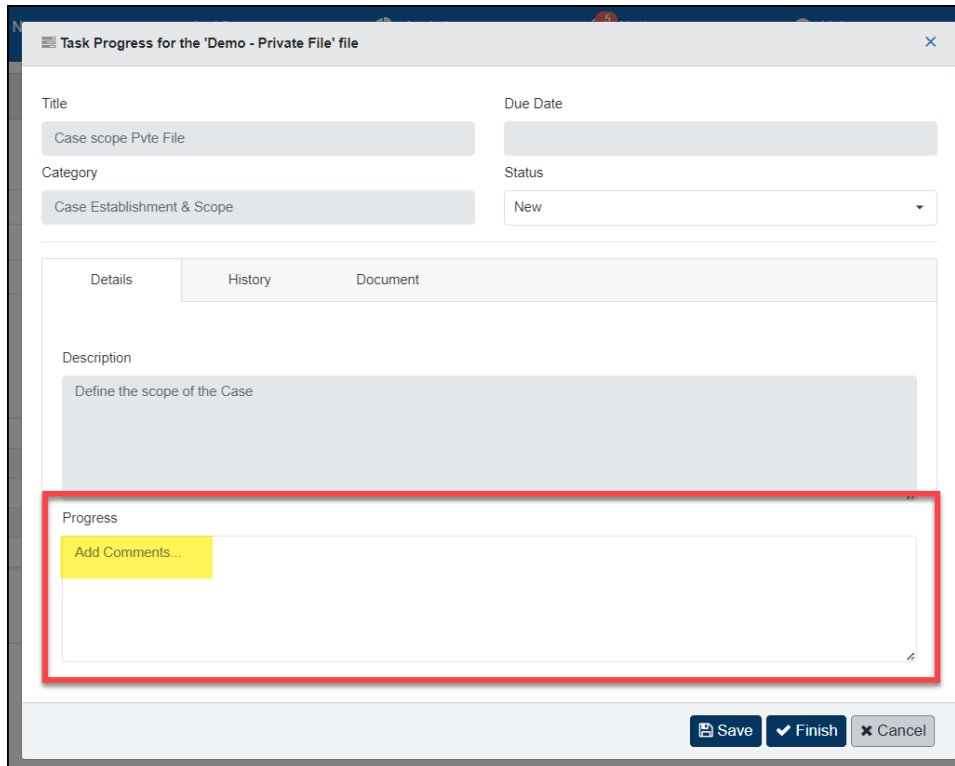
Notifications

Click on the Task Title to add Progress notes

The Owner or creator of the Task can edit it



Open the Task assigned to you and add progress comments.
Click Finish to save and close. Update the Status where appropriate.
The Task owner is notified when comments are added.



Task Progress for the 'Demo - Private File' file

Title: Case scope Pvte File

Due Date: [Empty]

Category: Case Establishment & Scope

Status: New

Details | History | Document

Description: Define the scope of the Case

Progress: Add Comments...

Save Finish Cancel

Only the Task creator or
Owner can delete a Task



Make the Connection