



## Building a Variable-Record Report Screen

### Connect™ Report Display

Users of BlueStep's Connect™ sites have a unique reporting/display feature available by combining Custom Detail Reports and pagelet Customized Content. This combination allows administrators to post a clickable list of individuals (or items) in one pagelet and a display of database information about any of the listed individuals in an adjoining pagelet. This creates an easy, efficient way of displaying data, while allowing the user to select records in real-time as needed, and also retaining security and control over the data. These lists and reports are secured by permissions, so that access to vital information is granted or restricted as you choose.

Creating a Variable-Record Report may take several forms on the screen, but any format requires that two Relate™ processes be in place before any information will appear. The Relate™ lists and reports that you desire to display must exist in the system or must be created.

First, queries (in Relate™) or groups (in HQ™) that will be the basis of the record selection list must have been created. If the list requires a specific query or group that is not already in the system, a Relate or Relate/HQ Administrator within your organization can create any queries or groups that you need.

Secondly, the Data Merge report that is the basis of the record display information must have been created within Relate™. If the data you need to display is not in a report, a Relate Administrator can create any Custom Detail Report that you need. For further information on Data Merge/Custom Detail Reports, see the user guide entitled **Using Custom Detail Reports**.

### Creating a Variable-Record Report Screen

On the selected Connect™ page, two pagelets must be customized to post the desired selection list in conjunction with the individual record display.

Select a page to contain the list and report, then choose two pagelets, one for a selection list and one for data display. You may create specific pages that contain only the list and report by going to the Site Structure selection on the Admin drop-down. Or you may add the list and data to any pagelets on an existing page of your Connect™ site.

In the example below, a dynamic list of all staff members (from a query) is displayed on the left. Clicking on any of the underlined names on this list produces the information on the right (from a Data Merge Report), which changes when a new name is selected. This function need not apply only to individuals, but may also be used for recalling data about any information that can be retrieved through a Relate™ query or an HQ™ group.

Edit Mode

<b>Andrew Aaronson</b> <span style="float: right; border: 1px solid white; border-radius: 3px; padding: 2px 5px;">Change Person</span>	<b>Individual Information</b> <span style="float: right; border: 1px solid white; border-radius: 3px; padding: 2px 5px;">Change Record</span>
<b>All Staff</b> <hr/> <a href="#">Aaronson, Andrew</a> <a href="#">Browder, Ben</a> <a href="#">Crandall, Chris</a> <a href="#">Devner, Donna</a> <a href="#">Emory, Edith</a> <a href="#">Griffin, Grace</a> <a href="#">Hepplewhite, Harry</a> <a href="#">Ivanova, Illya</a> <a href="#">Jeffers, Jane</a>	<div style="text-align: right; margin-bottom: 10px;"> <a href="#">Print</a> </div> <p><b>Name:</b> Aaronson, Andrew</p> <p><b>Address:</b> 1234 Aspen Avenue Almond Hollow, UT 88888</p> <p><b>Home phone:</b> (444) 444-4444</p> <p><b>Social Security number:</b> 555-55-5555</p> <p><b>Date Hired:</b> 12/12/1990</p> <p><b>Birth Date:</b> 12/12/1960</p> <p><b>Languages:</b> English, Japanese</p> <p><b>Spouse:</b> Amelia</p> <p><b>Children:</b> Four children - Robert, Jenny, David, Scott</p>

**The Selection List Pagelet**

To get started, click the Edit Mode button on the upper right of the screen. In the upper right corner of each pagelet an edit icon button will appear, from which a drop-down can be accessed. Using the drop-down of the pagelet you have selected for the list, click the Content Source selection.

Content Source
 Customize Content
 Borders and Colors

## Content Source

*Choose the source for your content.*

**Custom Content**  Text/HTML  
*Enter your custom Text/HTML on the Customize Content tab.*

**Site Content**  Source Site:  
Public Site ▼

Page from source site:  
- None - ▼

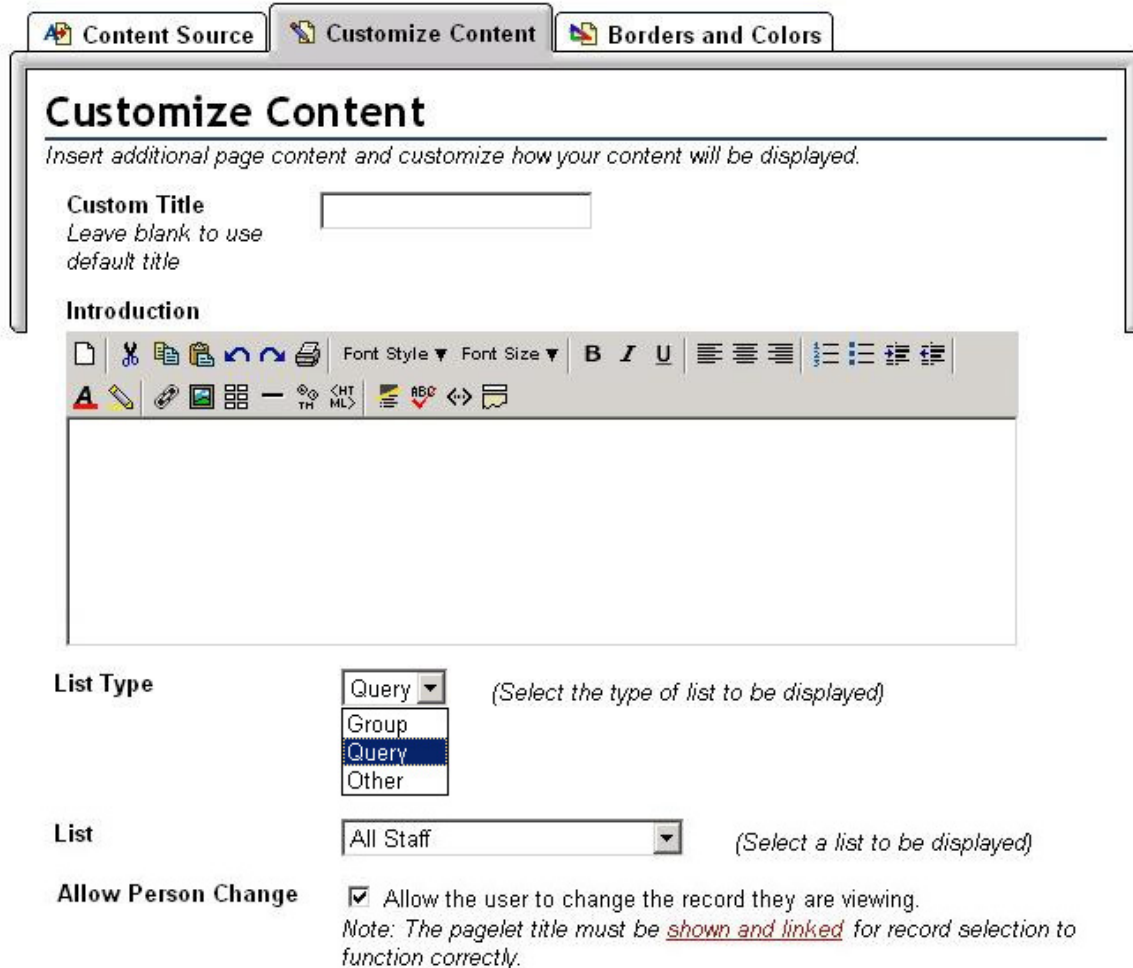
Media Library:  
- None -  [Media Library](#)

**Other Content**  Special content types:  
\* Select Record ▼

Data Merge Report:  
Custom Reports ▼

Under Other Content, the radio button next to Special content types should be selected. Using the field arrow, reveal the drop-down and click on Select Record.

At the top of this screen, click the Customize Content tab to the right of the Content Source tab. On the resulting screen, seen below, enter a title, if desired, and any text you would like to appear at the top of the selection list. Scroll to the bottom.



**Customize Content**  
*Insert additional page content and customize how your content will be displayed.*

**Custom Title**  
 Leave blank to use default title

**Introduction**


**List Type** Query (Select the type of list to be displayed)  
 Group  
 Query  
 Other

**List** All Staff (Select a list to be displayed)


**Allow Person Change**  Allow the user to change the record they are viewing.  
*Note: The pagelet title must be shown and linked for record selection to function correctly.*

Under List Type, use the field arrow to activate the drop-down. Choose whether the list will be retrieved from a Group (in HQ™), a Query (from Relate™) or Other, which is either a dynamic list of recent records that have been accessed in Relate™ or relationships that you have established through the relationship interface in HQ™. The most common selection is Query, which is shown in the example above.

Under List, the contents of the field will have changed according to the selection you made in List Type. If you have selected Query, the field arrow will access a list of all the queries that exist for your organization. Select the query that contains the information you desire to display. In the example above, the All Staff query was chosen.

 If you do not see a query that contains the information you desire, a Relate Admin from your organization can create the query for you or grant you the admin permissions needed to create your own query.

Under Allow Person Change, click the checkbox so that users may see all the records from this list. Using either the link, [shown and linked](#), or the Borders and Colors tab at the top of the screen, proceed to the next page.

 Content Source
 Customize Content
 **Borders and Colors**


## Borders and Colors


*Change how this area of the page looks by choosing header styles, borders, and colors.*


**Header Style**

No header













Title only

**Title Icon**

No Icon

Show Icon

**Title**

No Title

Show Title

**Title Link**

Link Title To Source

Don't Link Title To Source

**Borders**

*Click on right, left or bottom border to show/hide*


Left

Title

Right


Bottom

**Title & Border Color**





**Body Color**









**Background Image**



- None -

 [Media Library](#)

In order for the record selection to work properly, three selections *must* be made. All the other choices available on this screen are optional and may be set as desired.



Under Header Style, click the radio button for any of the headers shown, **except for the No header selection**. Under Title, click the radio button for Show Title. Under Title Link, click the radio button for Link Title to Source.

When completed, click the Save button  at the bottom of the screen. The original page will repaint and you will see the query results posted in the pagelet.

Go to the Tools drop-down and select Relate. Find the query you selected for this pagelet. Using the edit icon  recall the query and click the Permissions tab . For Relate Self, set the permissions at Reader. If you want any Registered Users to be able to view the list produced by the query, set Registered Users to Reader and click Save.

If you should desire to change the query you selected or to make changes to the title, text, colors, borders or header of the pagelet, click the edit button drop-down again and make the edits desired. Be sure that you click the Save button at the end of your changes.

### Report Display Pagelet

Click the Edit Mode button  on the upper right of the screen. Select the edit icon button  on the pagelet where you desire the report data to be displayed. Click the Content Source selection.

**Content Source**

*Choose the source for your content.*

**Custom Content**  Text/HTML  
 Enter your custom Text/HTML on the **Customize Content** tab.

**Site Content**  Source Site:  
 Public Site

Page from source site:  
 - None -

Media Library:  
 - None - [Media Library](#)


**Other Content**  Special content types:  
 - None -

Data Merge Report:  
 \* Staff Statistics

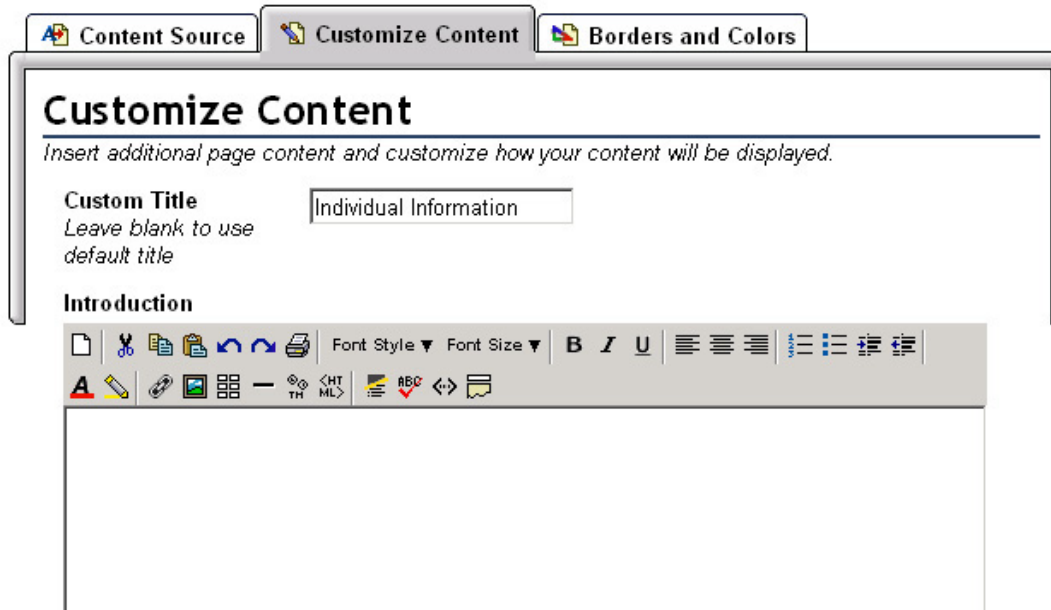
**\* Required**

- Custom Reports
- Intake Report
- 2. Medications
- Staff Statistics

Under Other Content, select the radio button next to Data Merge Report. Using the field arrow, reveal the drop-down and click on the name of the Data Merge report that contains the information you would like to have displayed. In the example above, the Staff Statistics report was chosen.

 If you do not see a report that contains the information you desire, in the format required, a Relate Admin from your organization can create the report for you or grant you the admin permissions needed to create your own report. For further information on Data Merge/Custom Detail Reports, see the user guide entitled **Using Custom Detail Reports**.

While on this screen, click the Customize Content tab to the right of the Content Source tab. On the resulting screen, seen below, enter a title, if desired, and any text you would like to appear at the top of the report pagelet. Scroll to the bottom.



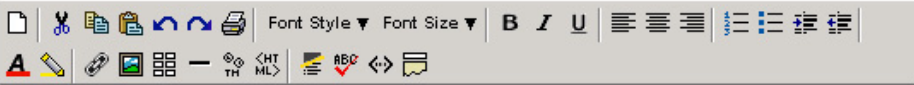
**Content Source** **Customize Content** **Borders and Colors**

## Customize Content

*Insert additional page content and customize how your content will be displayed.*

**Custom Title**   
*Leave blank to use default title*

**Introduction**



### Data Merge Properties


*The user viewing the Data Merge Report may choose to view a different record. What query should be used to select a record?*

- Allow Person Change**  Allow the user to change the record they are viewing.  
*Note: The pagelet title must be shown and linked for record selection to function correctly.*
- Record Selection** \*
- Print Link**  Provide a link to a print-friendly version of this report.




Under Allow Person Change, click the checkbox so that users may see all the records in this report. Under Record Selection, use the field arrow to access the drop-down. Choose the appropriate records from the list, specifically those that are the basis of the report being used in this pagelet.

In specific circumstances, you may also choose either the [Current User] or [Related Records] options on the Record Selection list. The Current User selection limits the user to seeing only his

own record, no matter what other choices have been made elsewhere. The Related Records selection limits the user to seeing only his own record and those records with which he has an established relationship within HQ™. For information on HQ™ relationships, see the **HQ™ User's Guide, 2004 Manual**.

Under Print Link, decide if you would like to offer users the option of printing the information contained in the displayed report. Click the checkbox to allow print; leave it blank to disallow. When checked, a Print Link icon  [Print](#) will appear in the upper right of the pagelet.








Using either the link, [shown and linked](#), or the Borders and Colors tab at the top of the screen, proceed to the next page.

 Content Source
 Customize Content
 **Borders and Colors**

## Borders and Colors

*Change how this area of the page looks by choosing header styles, borders, and colors.*

**Header Style**

<input type="radio"/> No header <input type="radio"/>  <input checked="" type="radio"/>  <input type="radio"/>  <input type="radio"/> 	<input type="radio"/>  <input type="radio"/>  <input type="radio"/>  <input type="radio"/> Title only
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**Title Icon**

No Icon  
 Show Icon

**Title**

No Title  
 Show Title

**Title Link**

Link Title To Source  
 Don't Link Title To Source






**Borders**  
*Click on right, left or bottom border to show/hide*

Left


**Title**

Right

Bottom


<p><b>Title &amp; Border Color</b></p> <p><input checked="" type="radio"/> </p> <p><input type="radio"/> </p>	<p><b>Body Color</b></p> <p><input checked="" type="radio"/> </p> <p><input type="radio"/> </p> <p><input type="radio"/> </p>
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**Background Image**


- None -  [Media Library](#)

In order for the report to work properly, three selections *must* be made. All the other choices available on this screen are optional and may be set as desired.

Under Header Style, click the radio button for any of the headers shown, **except for the No header selection**. Under Title, click the radio button for Show Title. Under Title Link, click the radio button for Link Title to Source.

When completed, click the Save button  at the bottom of the screen. The original page will repaint and you will see the report results posted in the pagelet.

Go to the Tools drop-down and select Relate. Mouse over the Admin tab on the right of the navigation bar. Select Relate Forms. Find each of the forms from which display information was selected for the Data Merge Report in this pagelet. You may need to recall the merge report and review what was entered. Using the edit icon  open the form and click the Permissions tab

. For Relate Self, set the permissions at Reader. If you want any Registered Users to be able to view the information produced from the selection list, set Registered Users to Reader and click Save.

If you should desire to change the report you selected or to make changes to the title, text, colors, borders or header of the pagelet, click the edit button drop-down again and make the edits desired. Be sure that you click the Save button at the end of your changes.

**!** For your users to be able to view the report information, you **must** be sure that at least Reader permissions have been granted to users on the queries and forms that you are making visible on these pagelets. You may check the permissions on the queries by going to Relate, clicking the edit icon for the query used in the Selection List pagelet and selecting the Permissions tab. You may check the permission on the forms by going to Relate, clicking the Relate Forms selection under the Admin drop-down, editing the form used in the Data Merge Report that is being displayed in the pagelet and selecting the Permissions tab. If you make any changes to either query or form permissions, remember to click the Save button.

For further information about setting permissions, see the user guide, **Understanding Permissions**, on the BlueStep™ Client Care website at [www.clientcare.bluestep.net](http://www.clientcare.bluestep.net).



## Step-by-Step through Variable-Record Report Screens

### Creating the Selection List Pagelet

- Click the Edit Mode button

#### Content Source

- Select Content Source from the pagelet drop-down
- Under Other Content, select Special Content Types
- Click Select Record from the drop-down list

#### Customized Content

- Click the Customize Content tab at the top of the screen
- Enter a title for the pagelet, if desired
- Type in any text desired at the top of the list





- Choose a List type from the drop-down
- Select a list from the List drop-down
- Click the checkbox under Allow Person Change

#### **Borders and Colors**

- Click the Borders and Colors tab at the top of the screen
- Under the Header Style section, select any header, except No Header
- Under the Title section, click Show Title
- Under the Title Link section, click Link Title to Source
- Click the Save button

#### **Permissions**

- Under the Tools button drop-down, click Relate
- Click the edit icon for the query used in the pagelet
- Click the permissions tab
- Set permissions as desired
- Click the Save button

### **Creating the Report Display Pagelet**

- Click the Edit Mode button

#### **Content Source**

- Select Content Source from the pagelet drop-down
- Under Other Content, select Data Merge Report
- Click the name of the desired report

#### **Customized Content**

- Click the Customize Content tab at the top of the screen
- Enter a title for the pagelet, if desired
- Type in any text desired at the top of the list
- Click the checkbox under Allow Person Change
- Choose a type of record from the Record Selection drop-down
- Click the checkbox to make a print link available, if desired

#### **Borders and Colors**

- Click the Borders and Colors tab at the top of the screen
- Under the Header Style section, select any header, except No Header
- Under the Title section, click Show Title
- Under the Title Link section, click Link Title to Source
- Click the Save button

#### **Permissions**

- Under the Tools button drop-down, click Relate
- Under the Admin drop-down, click Relate Forms
- Click the edit icon for each form used in the merge report displayed on the pagelet
- Click the permissions tab
- Set permissions as desired
- Click the Save button
- Repeat for each form whose information is contained in the displayed Data Merge Report