

**June 2004**

We're always looking for better ways to serve our clients while increasing our product capabilities and functionality. Since the beginning of May, we have made huge leaps in increasing our server capacity and decreasing average online response time. You should be seeing improved return times on every BlueStep™ page you access. Most sites visited on the web contain static, pre-stored pages that load relatively quickly. Our pages are *dynamic*, with a high level of interactivity, but now compare very favorably with static page load times. We hope the long hours we put into this speed improvement will reward our clients handsomely.\*

We've some new items to announce and have included some user tips and information below, which we believe will each prove beneficial to you and your clients/users. If you would like to post this document as a Shared File or send it as an e-mail attachment to your users, please feel free to do so.

We'd also like to take this opportunity to express our thanks to those organizations and individuals who attended the Answers4/BlueStep™ Innovator's Summit. We feel the conference was a success and provided a valuable forum for our clients, management and developers to share ideas and proactively address user's needs.

\* Please be aware that the performance enhancements we have made greatly reduce the average page-build time of our servers, but do not affect Internet transmission or the time your computer takes to process the page.

## **New and Updated**

### **BlueStep™ Client Care Site**

We've created a brand new site just for Organization Administrators and executives (not for end-users, our client's clients). It's called the BlueStep Client Care Site and its function is to promote closer connections and better communication with our clients. You'll find it at [www.clientcare.bluestep.net](http://www.clientcare.bluestep.net).

If you are an Org Admin or an executive at one of our client organizations, please visit the site (you can create your own login) and see what is presently available. One of our goals is to implement the ideas and suggestions from our recent user's conference. To that end there are two surveys, which will help us identify which of the issues submitted is most important to our clients. Your input is valuable in making BlueStep™ products respond to your needs, so please take a few minutes to fill out the surveys.

You'll also want to check out the permanent section of the site, which allows Organization Administrators and executives to directly send us, at any time, feature requests, enhancement suggestions or to report problems. There is also a link that lets you see the progress of requests you have entered as we work towards implementation.

Please note that this section does not take the place of our e-mail client care address, where we handle user problems and questions. Rather, it is designed to allow executive-level users to send us requests/reports that reflect the over-all desires of their organizations. Please continue to send end-user problems and questions to [clientcare@bluestep.net](mailto:clientcare@bluestep.net) and we'll be happy to help. If you are an end-user who has a feature request, please send them to the Organization Administrator of the BlueStep™ site you are using. He/she will be able to evaluate its effectiveness for the entire organization and forward the request to us.

## Relate™ Custom Detail Reports in Connect™ and HQ™

One of the important aspects of collecting data in Relate™ is the ability to quickly and easily recover that data in a format that is flexible and customizable. To accomplish this, we have a recent feature, called Custom Detail Reports, that has been heavily used with great results by several of our clients. By operating similarly to a mail/merge function, Custom Detail Reports fills a need for Relate™ database information to be dynamically inserted into nearly any pagelet content. There are virtually no limits on information that can be distributed, yet the strict standards of BlueStep™ security levels still apply, so that even Detail Report data is available only to those users you select, no matter where on your site it is placed.

## Relate™ Query Searches

A second enhancement to Relate™ is the upgrade of searching functions. When constructing a query for retrieval of your data, the third page of the query allows you to set defining parameters for records that will be included/excluded in the query.

Form	Field Name	Operator	Value
Personal Information	Full Name	Starts With	Set Value

The operator field has now been expanded to include more options for every field type – some with many more. This makes it possible to search for records that have specific fields that have been filled in or not filled in. Text fields (illustrated above) can be searched using alphabetic qualifiers and multi-select list fields can be searched by number of items selected and using mathematical set operations.

## Relate™, Team™, Connect™ and HQ™ Advanced Unit Security

We have greatly expanded the options and control that Organization and Unit Administrators have over unit security. This is particularly valuable for very large organizations where managing the user groups for each unit would be daunting and time-consuming. You can explore this function when creating or editing User Groups from the Organization Management section of the Organization or Unit Admin Home screen.

### User Group - New Dynamic Group

**Advanced Unit Security**

These settings allow permissions to be dynamically assigned to group members based on the relationship between the unit where the user's record is stored and the unit where the secure information is stored. This feature is designed for very large organizations with thousands of users in hundreds of units where managing separate user groups for each unit would be impractical.

Permissions granted to this group apply to **all** group members regardless of the relationship between the member's unit and the secure information's unit.

Permissions granted to this group apply to group members who belong to a **super-unit** of the unit where the secure information is stored.

Permissions granted to this group apply to group members who belong to the **same unit** as the unit where the secure information is stored.

Permissions granted to this group apply to group members who belong to a **sub-unit** of the unit where the secure information is stored.

## Team™, Connect™, HQ™ Document Versioning

Document Versioning, one of our newer products, has been greatly refined in the last few months, making it easier and more secure to use. You can now grant several levels of permission and have them function effectively. A “Participant” may view all versions, an “Author” may add new document versions and an “Editor” has full permission to add, edit or delete documents and their versions and to control version security. Additionally, the main Shared Files screen now allows direct access to the versions.

## Connect™ Structured Content

A new page type, Structured Content, has been created for use in Connect™ sites. It is designed to help you to quickly create online books, pamphlets and manuals. These appear in a clean, highly readable format with easy options for adding additional pages and creating book/document outlines. You can choose to make these printable or keep them viewable only online.

The screenshot shows a web page with a sidebar on the left containing a 'Newsletter' section and an 'Outline' section with a 'full outline' link. The 'New and Updated' section is expanded, showing items like 'Custom Detail Reports', 'Document Versioning', 'In-House Upgrades', 'Did you know?', and 'Note'. The main content area is titled 'New and Updated' and features a 'BlueStep™ Client Care Site' announcement. It includes a 'Reorder' button, a 'New Content Page' button, and an 'Edit Page' button. Below the announcement is a 'Print' button. At the bottom, there are 'Previous' and 'Next' navigation buttons.

## Connect™, Team™, HQ™ Unit Navigation Support

Some of our very large users – those with units numbering over 100 – experienced slow times in loading domain and organization tree pages, due to the large volume of data being retrieved. We have rewritten the navigation on those screens in Org Admin and Relate™ to display limited lists of unit data, with sub-navigation to the remaining units. This greatly reduces the time it takes to load these pages, thus decreasing the pressure on our servers and improving response time for all users.

## HQ™ Behavioral Health Treatment Libraries

An exciting new development for all of our HQ™ users is the addition of Behavioral Health Treatment Libraries from TheraScribe. Psychologists, psychiatrists and therapists will recognize and immediately be familiar with the layout, terms and definitions displayed in the library. (Brief Addiction Library sample below.) These seamlessly integrate into the HQ™ record summary and client service plans.

The screenshot shows a 'Service Libraries' sidebar on the left with categories like 'Service Plan Types', 'Modalities', 'Assessment Categories', 'Service Items', and 'Discharge Criteria'. The 'Addiction Library' is selected. The main content area is titled 'Addiction Library' and includes a 'New Problem' link. Below is a table with columns for 'Problem', 'Behavioral Definition', 'Long Term Goal', 'Short Term Objective', 'Therapeutic Intervention', and 'Edit Delete'. The table lists various conditions such as 'Adult-Child-of-an-Alcoholic Traits', 'Anger', 'Antisocial Behavior', 'Anxiety', 'Attention-Deficit/Hyperactivity Disorder (ADHD)', 'Attention-Deficit/Inattentive Disorder', 'Borderline Traits', 'Childhood Trauma', 'Dependent Traits', and 'Depression'. Each row has a 'View' link and an 'Edit Delete' icon. A pagination bar shows '1 - 30 of 37' and a 'Next' button.

Problem	Behavioral Definition	Long Term Goal	Short Term Objective	Therapeutic Intervention	Edit Delete
Adult-Child-of-an-Alcoholic Traits	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Anger	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Antisocial Behavior	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Anxiety	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Attention-Deficit/Hyperactivity Disorder (ADHD)	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Attention-Deficit/Inattentive Disorder	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Borderline Traits	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Childhood Trauma	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Dependent Traits	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	
Depression	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	

## Connect™, Team™ and HQ™ Calendar Type and Status Reorder

New buttons are available on calendar Event Type and Attendee Status, which give you the option of reordering the lists to suit your organization’s preferences.

## In-House Upgrades

There are several behind-the-scenes processes and procedures that we have recently implemented which we feel will improve our service to users.

The first is that our new login code, used for all user entry into the system, was rewritten with tight, spare code. Login is now even more direct and much faster.\*

Second is a series of new testing and release procedures. These are designed to move implementation of new features and the repair of bugs through a series of checks before they are deployed. Additionally, we now able to upload to one server at a time, which means that users do not experience down times when new code is being implemented. These two items and the new Relate™ code, below, have resulted in a much more stable, much more streamlined data platform.

Approximately 80% of the back-end Relate™ code has been rewritten to maximize server usage and decreasing data retrieval times. This results in increased performance throughout the Answers4/BlueStep system and faster page returns for users.\*


\* Please be aware that the performance enhancements we have made greatly reduce the average page-build time of our servers, but do not affect Internet transmission or the time your computer takes to process the page.

## Did you know?

Useful Information for BlueStep™ users

Q. How do I find information on my client's e-mail preferences? Some of my users need an unformatted (text only) e-mail from me.

A. Good question. Users enter and edit this information on the Online Profile screen (except PMI). If you have purchased Relate™, an Organization Administrator can look up the user in question through a Relate™ query – All Users query will usually find them. Select the user's account, then click the Online Profile section of their record summary. The e-mail preference is displayed at the bottom.

 **Online Profile**

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*Change your password, password hint, and subscription preferences.*

\* Required

Username \*

Password \*

Re-type Password \*

**In case you forget...**

*If you ever forget your password we'll ask you this question.*

Question We'll Ask \*

Your Answer \*

**Subscription Preferences**

*Use these settings to control how email notifications are handled.*

Email Format \*  Not Formatted (Text Only)  Formatted (Will not work with some email readers.)

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\* Required

Q. I don't know all the ways I can move documents within Shared Files. Is there a method to move documents and files on my own site without reposting them?

A. There sure is. I'm glad you asked, because it's a question that comes up all the time. When you first upload a document, the Destination drop-down field allows you to choose any folder on the Shared Files tree to store the document, whether it be inside a folder you created or as a stand-alone document in the root folder.

## File Upload

[Add Multiple Files](#)

Select the file to upload and type in a description. **Large files could take several minutes to complete.** After your upload is finished, the next page will appear.

**File to upload** \*  [Browse...](#) [Add Multiple Files](#)  
(Max upload is 10MB)

**Description** \*

**Destination**

Root Folder

Root Folder

Sales Team Folder

Client Implementation

Client Proposals

Proposal Templates

Completed Proposals

Client Contracts


Contract Templates



Completed Contracts


Client Licenses


License Templates

\* Required

Once a file has been uploaded, you can edit it from the Shared Files screen. Click the edit pencil  and change the Destination to a new desired folder location, where needed, as often as needed. When you click Save, the document is moved from the old folder to the new folder in the Shared Files file tree. You can also create folders within folders as many levels deep as you need to customize file storage.

This brings up the question of reordering. Any document that you post will become the last document in its selected folder or the last item in the root folder (if it is a stand-alone document without a folder that you have created). Any folder you create will become the last folder in the root folder or the last sub-folder in an existing folder. You can move folders into any order and move their contents into any order by using the two 'Reorder' icons  .

The 'Reorder Document' icon  will appear to the right of any folders in your Shared Files system. If you click it, you'll get a pop-up window displaying any documents that are in that folder, along with movement function keys. If there are no documents, the pop-up will be blank. In that case, either there is nothing in the folder at all or the folder only contains other folders.

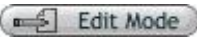

If you click the 'Reorder Folder' icon , the pop-up will contain the list of all folders. If there are no folders inside this folder, the pop-up will be empty. In this case, either there is nothing in the folder at all or the folder only contains documents. 'Reorder Folder' is particularly useful in the case of the icon associated with the root folder. Using it will reorder the main folders in your system to a format that is meaningful to you.

**Q. Can I assign tasks in Team™ to an entire group?**

A. No. Tasks in Team™ are attached to the individual user's record; there is no "Team record" to which a task could be attached. Perhaps the most useful approach would be to assign the task to the Team lead, then have him assign specific portions of the task (or subtasks) to the members of his Team™.

**Q. The Team Landing page isn't really helpful to my users. What can I do about it?**

A. You have to be an Organization Administrator to change Team Landing pages, but if you are, you have plenty of options. The content on Team Landing was created as a 'food for thought' page to generate ideas and give users a broad notion of the value of team collaboration. Loading items specific to your organization and environment is extremely beneficial and very easy to do. You may store the existing pagelet contents elsewhere for future reference, if desired, and replace them with titles, text, pictures, graphics, reports, essays, etc. of your own choosing at any time and change them as often as needed. Basically, the sky is the limit as far as what you place in the pagelets.

To get started, login using your Org Admin login, then click the Edit Mode button  at the upper right. The screen will repaint with edit icons  at the upper right corner of each pagelet on the page. These define spaces on the page where you may add to, edit or delete the existing content.



Edit Default Team Title and Logo [View Mode](#)

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**Welcome to TEAM™**

**Best Practices**

- 1. Define your Goal / Establish a Purpose**  
 It is critical for the team to have a goal or purpose. This can be as simple as accomplishing some small task or as complex as defining a BAHG (big and hairy goal). Some teams may establish very defined missions or charters. Others may be ad hoc or informal. The key is just to do it. If you don't set a goal or purpose the TEAM will loose its focus.
- 2. Instill a Sense of Urgency and Commitment**  
 Create an environment where quick action is the norm. "Do It!" "Do It Now". I'll have my part done in two days. "When can I count on yours?"

[For More Click Here →](#)


**My Teams 1 of 1**

- Product Marketing

**My Tasks 2 of 2**

- Research  
 Status: ● Project: Marketing Limits  
 Project
- Formatting  
 Status: ● Project: Marketing Limits  
 Project

Click on any of the icons and you'll get an edit pop-up with options to select a source page for content, to customize content with text and pictures, to select from heading, border and color options or to clear the existing selections for that pagelet.

While it is possible for you to delete the My Teams and My Tasks links on the right of the screen, doing so would eliminate a shortcut that is a valuable tool for users. It would be most helpful to load new content into the pagelets to the left and below My Teams and My Tasks. Additionally, there are three pagelets that span the entire width of the screen located above My Teams, which may be appropriate for headings or other big-banner uses. Any pagelets left empty will disappear when you return to the standard view mode, using the View Mode button .

Also, you will notice that next to the Edit/View Mode button is a link, [Edit Default Team Title and Logo](#). While this link will not set the logo area of the Team Landing page, it will set the default for subsequent Team™ pages, branding all of them with your organization's identifiers. Should a specific Team™ need a different look, that edit can be made on the Admin tab of that particular Team's home page.

**Q.** I have purchased the third-party site statistics package (One Stat) that you offer, but we have a couple of new sites and the statistics don't appear for them. What do I do?

**A.** That's easy. Just let us know the sites/teams/etc. on which you would like to have statistics reported and we'll turn them on for those pages. Generally the process takes just a day for reporting to begin.

**Note:** The base license fee includes all the features and upgrades mentioned above for the product(s) you have purchased. Document Versioning and Site Statistics are add-on products, which are licensed separately. Please contact us for pricing information regarding these new products.

## New Development Calendar

The following items are on our development calendar for the next three (3) to six (6) months. Should you have other items you would like to put on a "wish" list for consideration, please let us know. We are always looking for features and enhancements that will make our products better, easier to use and more powerful.

Shopping cart functionality – ready for release in 3 to 4 weeks

Ability to add objects/graphics to Relate™ records

Data import utility for Relate™

Expand Relate™ relationship capabilities

HQ™ enhancements

- Billing linked to inventory and services

- Time clock sub-system

  - Payroll

  - Time for completion

  - Shifts and transitions

- Inventory

  - Pre-authorization

  - Amount on hand

  - Unit pricing & Package pricing

  - Item descriptions

  - Client inventory

  - Reorder levels

  - Inventory Auto-reordering

We greatly value all of our customers and look forward to our continued relationship. As with our new and update features above, we continually endeavor to meet and exceed your expectations, while expanding the capabilities and functionality of our system. Please let us know if there is anything that we can do to be of assistance to you or your users.

Sincerely,

Roy D. Rasband, President

Answers4 Association, LLC