



Formatting the Team™ Roster

The Team™ Roster Display

The Team Roster displays the names and e-mail addresses of all members of the Team. Using a Data Merge Report, administrators can redesign the roster page to also display any other Relate* data collected from Team members.

Once the content of the roster page has been selected and configured for the desired information, administrators have the option of collecting the needed data through a wizard presented to users upon sign-up or the first time they access the Team after the changes are implemented.

Configuring the roster display requires five (5) operations. The first four steps must be done by a Relate™ administrator. The final step must be completed by either the Team Lead of each Team or the Unit/Org administrator for all Teams.

- Building the Relate form
- Setting up a roster category
- Constructing the Data Merge Report
- Constructing the Data Entry Wizard
- Setting Team 'Information and Permissions' page on each Team

* Relate data is any information that can be entered into the system via a Relate form.


Building the Relate Form

You will need to build a new Relate form for any information you would like to display on the roster *that is not already being collected from your users* through forms on an existing data entry wizard. If the desired data exists in one of the fields on any one of the forms already within your system, *do not create a duplicate field on this form.*

If all the data that you would like to display is already being gathered by one or more Relate forms in your organization, you do not need to create a new form and can skip this step. However, you will need to adjust the permissions on the existing forms to allow the data to be displayed on the roster page. See the **Permissions** section below for instructions.

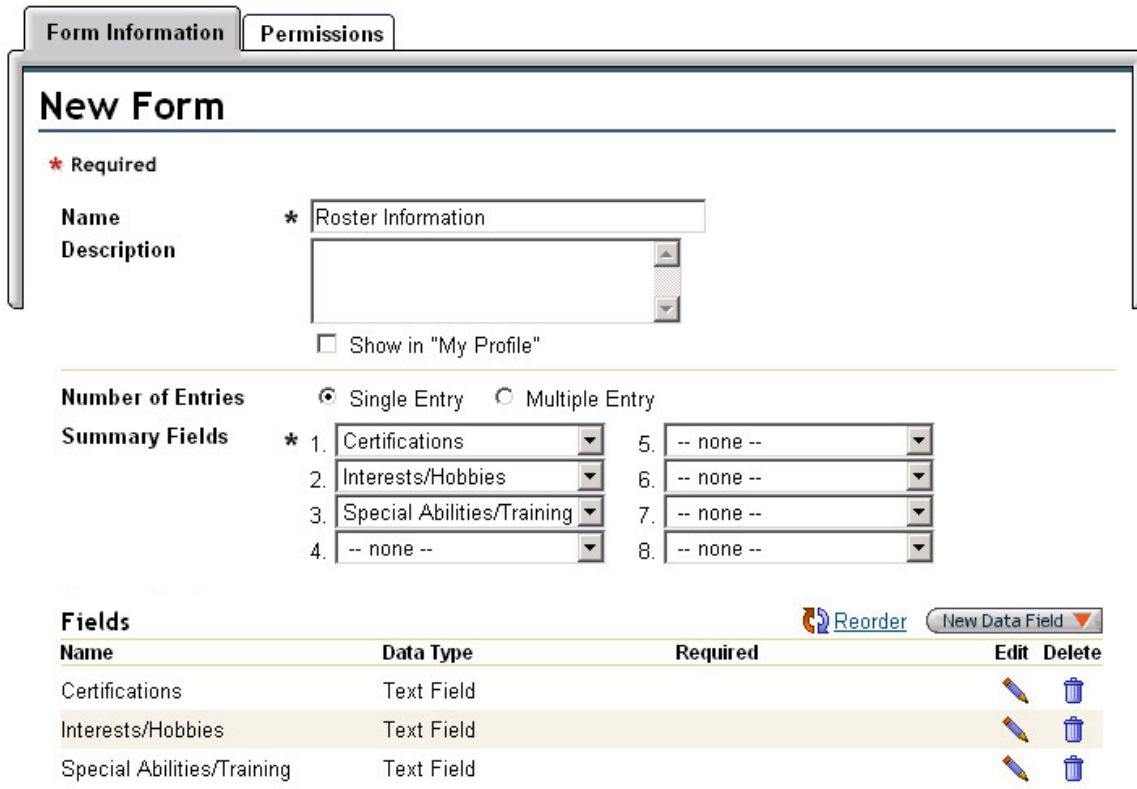
New Form

Under the Tools drop-down at the top of the screen, select Relate. Mouse over the Admin link on the navigation bar. On the drop-down, click Relate Forms. Select the New Form button

. On the New Form screen (Form Information), seen below, enter a name for the

form, which will be seen by users if roster data is collected through a wizard, and any description desired.

If you want this information to be available to users under the My Profile link (where they can edit their own information), click the 'Show in My Profile' checkbox. Select the Single Entry radio button next to Number of Entries. Scroll to the Fields section at the bottom of the screen.



New Form

*** Required**

Name * Roster Information

Description

Show in "My Profile"

Number of Entries Single Entry Multiple Entry

Summary Fields *

1.	Certifications	5.	-- none --
2.	Interests/Hobbies	6.	-- none --
3.	Special Abilities/Training	7.	-- none --
4.	-- none --	8.	-- none --

Fields [Reorder](#) [New Data Field](#)

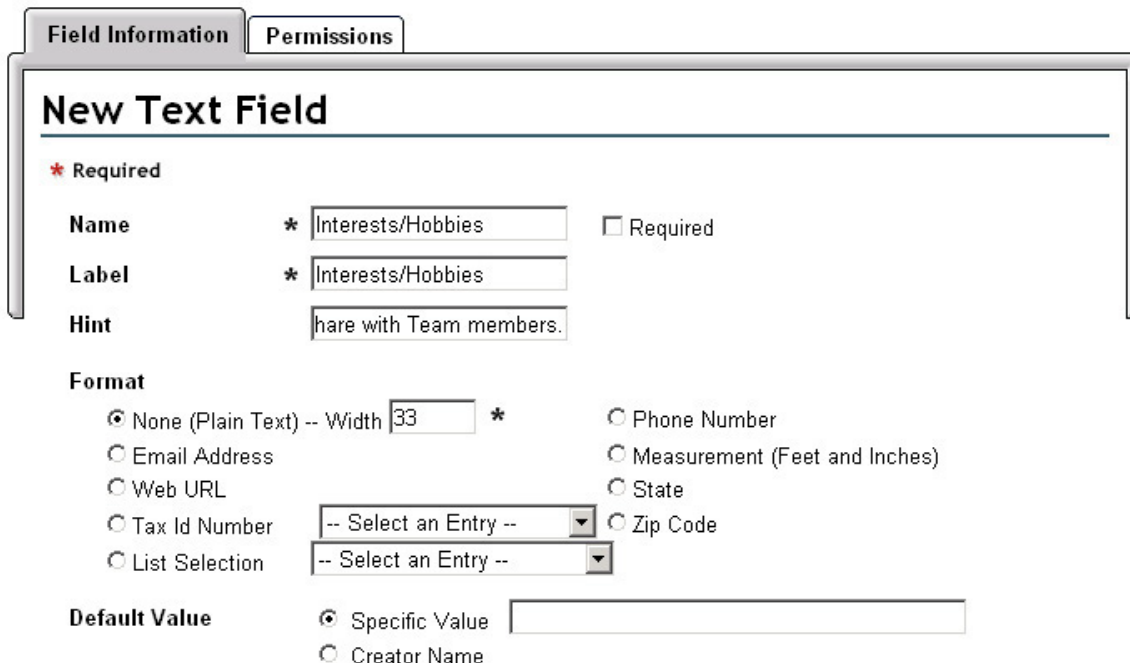
Name	Data Type	Required	Edit	Delete
Certifications	Text Field			
Interests/Hobbies	Text Field			
Special Abilities/Training	Text Field			

Mouse over the New Data Field button on the upper right of the Fields section. Select from the drop-down list, seen below, the type of field needed to capture the desired data. In the above example, Text Fields were selected for each field, but you may use any type that meets your needs and the resulting form may contain as many or as few fields and field types as you desire.

- [New Data Field](#)
- Text Field**
 - Memo Field**
 - Date/Time Field**
 - Number Field**
 - Boolean Field**
 - Single Select List Field**
 - Multiple Select List Field**
 - Spacer**
 - Section Header**

Each type of field (Text, Memo, Date/Time, Number, Boolean, Single Select List, Multiple Select List) presents a different New Field screen with different information requested. You must fill out each of the required fields, denoted with an asterisk *, for the field to be created, to appear on

the new form-creation (Form Information) screen and eventually become available to users. The remaining, un-asterisked fields are optional and you should enter information as needed or desired and as dictated by the field type.



Field Information **Permissions**

New Text Field

*** Required**

Name * Interests/Hobbies Required

Label * Interests/Hobbies

Hint Share with Team members.

Format

None (Plain Text) -- Width 33 * Phone Number

Email Address Measurement (Feet and Inches)

Web URL State

Tax Id Number -- Select an Entry -- Zip Code

List Selection -- Select an Entry --

Default Value



Specific Value


Creator Name

The illustration above is an example of a Field Information screen for the Text type of field. As mentioned, asterisked fields are required; others are optional. All field types require a name for the field, which will appear on the form-creation screen. Most field types require a label, which is the word(s) that appears on the form when it is presented to a user. All field types allow you to make them required on the form (as displayed to the user) and will not let the user proceed in saving the form unless he/she has entered data into the required field. Select the Required checkbox to turn on this feature for the field you are building. Other field type screens will display different items specific to the field type. Use them to configure the field as appropriate for your data needs.


When you are satisfied with your field entries, click the Save button. You will be returned to the New Form screen.


If you need to separate any of the fields with a blank vertical space or by a labeled header, select the Spacer or Section Header options on the New Data Field drop-down.


If you need to edit any field, click on the edit icon  and make the desired changes. When you are satisfied with the edit, click the Save button. You may not edit one field type to be another field type. If you find the selected field type is not appropriate, create a new field of the correct type and delete the old field using the delete icon .

If you desire the fields to appear on the finished form in a different order than the order in which you have entered them, click the Reorder icon . A pop-up containing the field names will appear where you can use the provided keys to move the fields into their proper position. When you are satisfied with the field order, click the Save button.




When all of the necessary fields have been created, return to the Summary Fields section in the center of the New Form (Form Information) screen. Using the field drop-downs , you must select at least one field as a summary screen display field. You may choose up to seven (7) others. These generally will not be visible to users and will not be seen on any Data Entry Wizards, but will be available to those who have access to individual records within Relate™.

When all selections on this page are complete, click the Permissions tab  at the top of the screen.

 Do not proceed to other forms without setting the permissions and then clicking the Save button. Doing so without saving this form on either the Form Information screen or the Permissions screen will erase all the form creation work you have done.

Permissions

Whether you are creating a new form or using the data collected by existing forms, you will need to set permissions to make the data visible on the Team Roster.













To retrieve a form (other than the one you are in the midst of creating), click on Relate Forms under the Admin drop-down. Locate one of the forms containing data you will be using on the roster. Select the Edit icon  associated with it, then click the Permissions tab.

Form Information
Permissions

Permissions

Use this page to control the level of access to content and functionality.

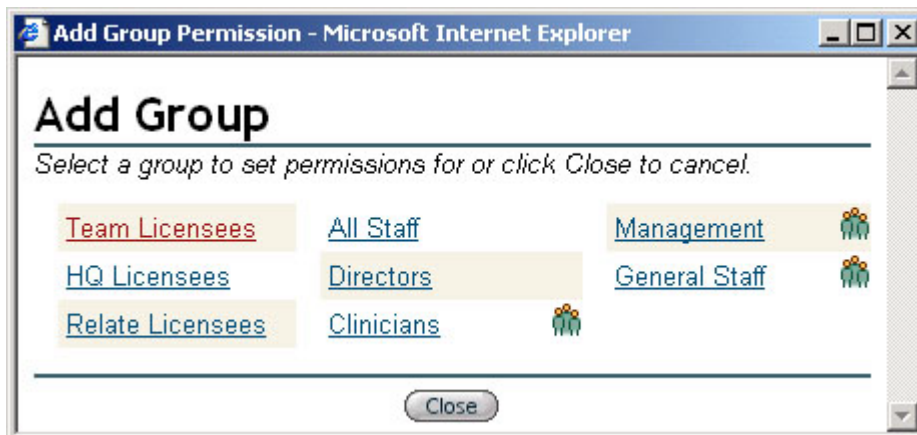
Add Group
Add User

Group/User	No Access	Reader	Author	Editor	Remove
 Everyone	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 Registered Users	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 Relate Licensees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
 Relate Self	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
 Team Licensees	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 Unit Admins	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

Permission Rules

- "Readers" can view data, "Authors" can create data, and "Editors" can modify or remove data. "No Access" revokes permission granted at a higher level.
- Permissions granted to individual users take precedence over permissions granted to groups of users. If a user has access through multiple groups, the least restrictive permission applies.
- "Relate Self" defines the permissions users have to their own record.

Look for 'Team Licensees' in the Group/User column. If it is not there, click the Add Group button at the upper right. The pop-up will contain all security groups and all committees that have been created for your organization. Click on the underlined Team Licensees link.



Team Licensees will be added to the list of Groups/Users shown on the Permissions screen. Using the columns and radio buttons adjust permissions as shown in the permissions illustration and the list below.

- Everyone – No Access
- Registered Users – No Access
- Relate Licensees - Editor
- Relate Self - Editor
- Team Licensees - Reader
- Unit Admins - Editor


These are the optimal permission levels for forms that apply to the Team Roster page. Relate Self should remain at either Editor (allows a Team member to update their own data) or Author (denies a Team member the right to update their own data). If Team Licensees are set at lower than Reader permissions, they will not be able to see the roster data. You may decide to set Team Licensees to No Access if the data should only be visible to selected individuals. In that case, you would need to add the selected individuals (or committee) using the Add Group button and assign a permission level to them. If this form is being used for other purposes as well as the roster, you will need to set additional permissions to cover for those uses.

When the permissions are set as desired, click the Save button. You will be returned to the Relate Forms screen. Repeat this permissions process for each form containing data that will be used on the roster.

 For comprehensive information on permissions and their usage, see the document, **Understanding Permissions**, located at www.clientcare.bluestep.net.

Setting Up a Roster Category

While existing categories can be used for the roster display, creating a new category for use on the roster page is the easiest, cleanest way to proceed. If you are not creating a new form, you also may not need to create a new category. You will need to use the existing categories to which the existing forms are associated for the merge report and wizard.

On the Admin drop-down, click Relate Categories. Click the New Category button  on the resulting screen. The New Record Category screen will appear, seen below.

Category Information

Permissions

New Record Category

*** Required**

General Information

Name *

Description

Applies To * Individual Organization

Forms

What additional information should be captured about this record category? When adding to this category users will be prompted to enter data into required forms.

Required	Optional	Form	Required	Optional	Form
<input type="checkbox"/>	<input type="checkbox"/>	Certifications	<input type="checkbox"/>	<input type="checkbox"/>	Initial License Data
<input type="checkbox"/>	<input type="checkbox"/>	Client Notes	<input type="checkbox"/>	<input type="checkbox"/>	Inquiry
<input type="checkbox"/>	<input type="checkbox"/>	Client Status/History	<input type="checkbox"/>	<input type="checkbox"/>	Performance Review
<input type="checkbox"/>	<input type="checkbox"/>	Contact Information	<input type="checkbox"/>	<input type="checkbox"/>	Personal Contacts
<input type="checkbox"/>	<input type="checkbox"/>	Correspondence	<input type="checkbox"/>	<input type="checkbox"/>	Personal Info
<input type="checkbox"/>	<input type="checkbox"/>	Education	<input type="checkbox"/>	<input type="checkbox"/>	Physical Description
<input type="checkbox"/>	<input type="checkbox"/>	Employment Information	<input type="checkbox"/>	<input type="checkbox"/>	Request Info
<input type="checkbox"/>	<input type="checkbox"/>	Goals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Roster Information

Select and enter an identifying name for the category. See the example above. You may add a description, if desired. Select the checkbox associated with Individual under the 'Applies To' section. Select the form you created in the first step (and/or any other forms to be used in data collection) and check under the Required column. In this example, the form just created was called Roster Information.

When you are satisfied with the entries, click the Save button at the bottom of the screen. You will be returned to the Relate Categories screen.

Constructing the Data Merge Report

Under the Admin link on the navigation bar, click [Detail Reports](#) from the drop-down. Click the [New Data Merge Report](#) button New Data Merge Report. This feature is similar to a mail-merge function in that it draws data from the forms you have specified and inserts it into formatting of your choice.

Name and Record Type

On the resulting screen, seen below, select a name for the report and enter a description if desired. Click the Individual record type under 'Applies to what types of record?'. Click the Next button when done.

New Data Merge Report

Step 1 of 4

Select record types to include.

*** Required**

Name & Record Types

Report Name *

Description

Applies to what types of records? *

- Individual Organization

Record Categories and Usage/Usage Options

On the Record Categories and Usage page, seen below, use the column radio buttons to select which categories of record information, within the selected types, will be available for this report.

If you will be using this merge report for the Team Roster only, the Roster Category must be set to Must Have. All other categories can remain at Not Applicable. If you have additional uses for this merge report, you will need to select those categories that will be most applicable to your desired report uses.

New Data Merge Report

Step 2 of 4

Select record categories and units to include.

Record Categories & Usage

Category	N/A	Must Have	Has Any Of These	Cannot Have
Care Partner	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discharged Client	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inquiry	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Payer	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Responsible Party	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Roster Category	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Usage Options

Define where this detail report should be available to be viewed and how what can be done while viewing it.



Description	In Relate & HQ	In Connect
Make any multi-entry reports inserted into this report have edit/delete links if permissions on the multi-entry form allow it.	<input type="checkbox"/>	<input type="checkbox"/>
Replace the Record Summary with this report for all applicable records.	<input type="checkbox"/>	<input type="checkbox"/>
Make this report available on the Reports page for applicable records.	<input type="checkbox"/>	<input type="checkbox"/>
Make this report available on the record navigator when view or editing an applicable record.	<input type="checkbox"/>	<input type="checkbox"/>
Make this report available to Connect site designers for display on a composite page.		<input type="checkbox"/>


Below the categories, usage options are available. If you will be using this merge report for the Team Roster only, uncheck all of the option selections. If you have additional uses for the merge report, select those that will allow the required usage. When this screen is complete, click the Next button.

Report Content


On the report content page, you will be entering and formatting those data elements that you want to appear on the finished Team Roster screen.


Using the Editor box, add any graphics and text that you would like to be a permanent part of the formatting for each record as it is displayed on the roster. Cut-and-paste from other sources or type in the desired text. Next, using the Editor header, do any formatting of the text (bolding, colors, tables, indents, etc.) as desired.

In the example below, Cell, State, Country, Certifications, Training and Interests were typed into the editor box, along with the colons and the comma. The last three items were indented. The *First Name Last Name* line was bolded using temporary text (see note below). The small page icon  was a graphic added through the Media Library icon .

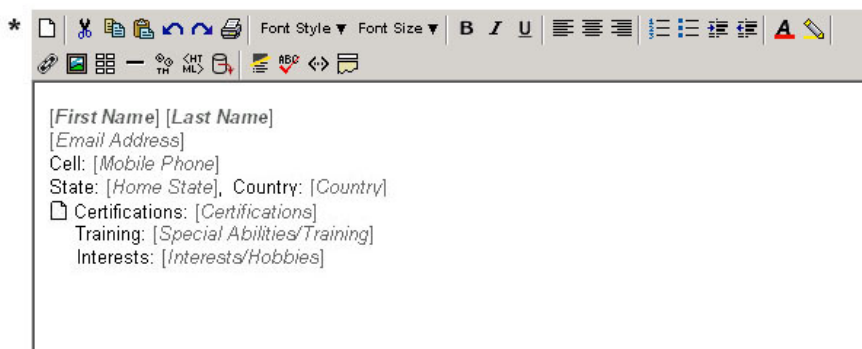
 To apply formatting to insertions when you have no text where the insertion will be located, such as in the *First Name Last Name* and the *Email Address* lines below, type in any characters to use as temporary text, then do the formatting as desired. When the insertions are complete (see instructions below), remove the temporary text.


New Data Merge Report

Step 3 of 4 

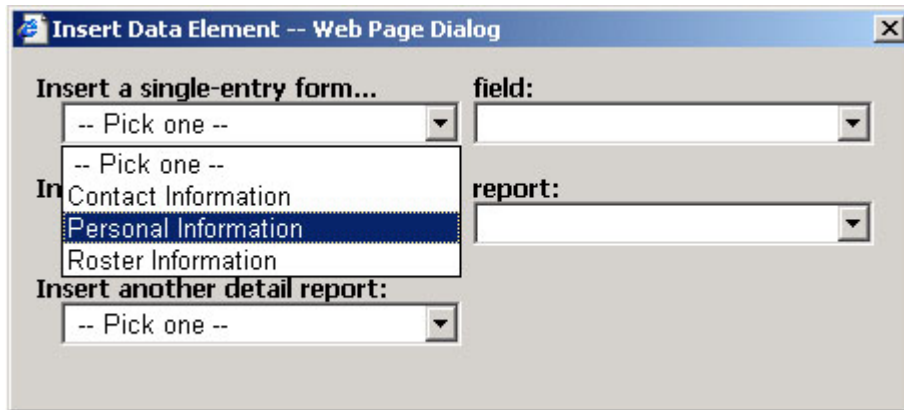
Custom detail reports work like a mail-merge or form-letter. To insert a data element, use the  button on the toolbar. Three types of data elements may be inserted: individual fields from single-entry forms, multi-entry form reports, and other detail reports. The list of possible data elements is based on the record types and categories selected in steps 1 and 2.

Report Content




The remaining items - the data insertion tags (italicized within brackets) - were selected from among the fields and forms available in this report. To make these selections, click within the editor box and position the cursor in the correct spot for the first data element. Click the data insertion icon  in the Editor header. The resulting pop-up, seen below, will allow you to select the form that contains the information desired.

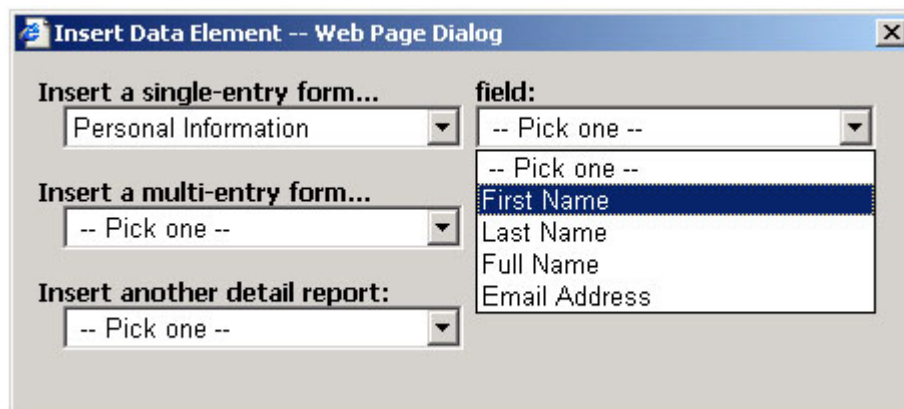
Using the field arrow activate the drop-down in the first field (Insert a single-entry form...) and choose from the forms listed. You should see the name of the form you created specifically for the roster on this list and/or any others containing data you are using.



In the example above, the drop-down contains all the single-entry forms in use in this organization **and** that apply to the record type and categories that were selected on the first and second screens of this report. The Personal Information form is selected in the example above. Your organization will have similar forms from which you should make your selection.

 You will need to check the permissions status on each of the forms from which you are inserting data. To make this easier, write down the name of each form that you select for insertion. When the merge report is complete, you can verify that the data will be visible on the Team Roster by accessing each form on the list you made and checking the permissions. Refer to the **Permissions** section, above, for instructions on accessing forms and setting permission levels. For comprehensive information on permissions and their usage, see the document, **Understanding Permissions**, located at www.clientcare.bluestep.net.


Move to the second field (field:) in the pop-up and activate the drop-down.



All the fields contained in the selected form are listed in the drop-down. Click on the field containing the information you wish to have displayed in the report. In the example above, the First Name field was selected. Your organization will have forms with similar fields from which you should make your selection.

The data insertion tag will appear in the editor text where you clicked to position the cursor. If this is an incorrect position, you may delete the tag and click to position the cursor in another spot. Using this example, the data tag would appear as *[First Name]* placed within the editor box.

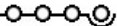
Repeat the insertion steps for every data element you would like to have displayed on the roster.

 While fields from a single-entry form are the most likely and the most useful insertions for a roster, in specific cases and to accomplish sophisticated reporting tasks, multi-entry forms and other detail reports may also be inserted into the formatting. For details on accomplishing this and many other merge report functions, see the document, **Creating Custom Detail Reports**, located at www.clientcare.bluestep.net.

Report Permissions

Each Data Merge Report has its own permissions, accessed on the last page of the report, as seen below.









New Data Merge Report

Step 4 of 4 

* Required

Permissions

Use this page to control the level of access to content and functionality.

Group/User	No Access	Reader	Participant	Author	Editor	Remove
 Everyone	<input checked="" type="radio"/>	<input type="radio"/>				
 Registered Users	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 Relate Licensees	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 Team Licensees		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	



Click the Add Group button at the upper right of the screen. On the resulting pop-up, select the underlined Team Licensees link. Team Licensees will be added to the Group/User column. Be sure that permissions are set as in the illustration above and on the list below.

- Everyone – No Access
- Registered Users – No Access
- Relate Licensees - Reader
- Team Licensees – Reader

When permissions are set, click the Save button at the bottom of the screen. You will be returned to the Custom Detail Report screen.

Constructing the Data Entry Wizard

If you construct a User Wizard, your Team members will be automatically asked to fill out any information that is needed for the roster. This will occur either when the individual responds to an invitation to join the Team or at the next instance of the Team member accessing the Team after the new formatting is in place. You may, of course, choose to gather information manually and place it in the user's record, but use of a wizard is quick, easy and recommended.

Under the Admin link on the navigation bar, click Data Entry Wizards from the drop-down. Click the New Wizard button . Select a User-type wizard by clicking the New button  opposite the New User Data Entry Wizard title.

New User Data Entry Wizard

Step 1 of 4 

A data entry wizard allows you to create a series of forms for collecting information on a website. A data entry wizard can be used as a page on a Connect site or as a site sign-up.

* Required

Wizard Identification

Name	*	<input type="text" value="Roster Information"/>
Description		<input type="text"/>

What kind of information should be entered?

The forms in the wizard are determined by Relate Record Categories.

Record Categories	<input checked="" type="checkbox"/> Roster Category	<input type="checkbox"/> Staff
	<input type="checkbox"/> Discharged Client	<input type="checkbox"/> Client
	<input type="checkbox"/> Non-Care Partner	<input type="checkbox"/> Payer
	<input type="checkbox"/> Inquiry	<input type="checkbox"/> Responsible Party
	<input type="checkbox"/> Care Partner	<input type="checkbox"/> Inquiry (old)

Wizard Identification and Categories

Enter a name for the wizard, which will be seen by users when they fill out the requested information, and any description desired. Select the checkbox associated with the category you assigned for roster information. In the example above, the category was titled Roster Category. Click the Next button when done.

Form Selection and Order

The second page of the wizard, shown below, lists the required forms that will be included and asks for the optional forms you would like to include. Be sure that all the forms you selected while constructing the Data Merge Report are listed on this screen.

If any of them are shown as optional, under 'Which optional forms should be included?', select the checkbox associated with that form, so that the form will be included in the wizard.

New User Data Entry Wizard

Step 2 of 4 

Form Selection

Based on the record categories you selected, the following forms may be included in your wizard. Some forms are required and some are optional.

These required forms will be included.

Personal Information
Roster Information
Online Profile*

* This form will only be included if the user does not already have an account.

Which optional forms should be included?

- Contact Information
 Personal Contacts

Form Order


To change the order that forms appear in the wizard, select a form and click on the up or down arrow.

Personal Information	 Move to Top  Move Up  Move Down  Move to Bottom
Roster Information	
Online Profile	

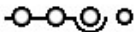
Under the Form Order section, you may change the order in which users see the forms in the wizard. Using the keys provided, make any changes you desire, then click the Next button.

Form Options

On the third page, seen below, be sure that all the forms listed have the 'Hide if previously completed' boxes checked.

 In the majority of instances, you will not have used data from a multi-entry form in the detail report constructed for the roster. If that is the case, you will not need any of the settings under Multiple Entry Forms. If you have used a multi-entry form, either 'Always create a new entry' or 'Show entire list' may be appropriate for the wizard. You will need to evaluate your data requirements and usage to make that determination.

New User Data Entry Wizard

Step 3 of 4 

Form Options

Some forms may have optional fields. You may want to streamline data entry by leaving out optional fields. For single entry forms you may also streamline a wizard being used to edit an existing record by hiding forms that were previously completed.

	Only show required fields	Hide if previously completed
Personal Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Roster Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Online Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Multiple Entry Forms

Multiple entry forms can appear as a table of entries or as a normal form. "Always create a new entry" will cause the form to display like a single-entry form and will always create a new entry. "Show entire list" allows users to select and edit an entry or choose to create a new entry.

	Always create a new entry	Show entire list
There are no multi-entry forms		

When you have completed all selections, click the Next button.

Notification and Settings

On the fourth page of the wizard, all the default settings are optimal for use with a Team roster page. Do not make any entries, simply click the Save button at the bottom. You will be returned to the Data Entry Wizards screen.

Setting Team Information and Permissions

With the above steps completed, a Team Lead, a Unit/Org administrator or a Relate™ administrator should go to each Team where this roster formatting is desired and apply the new screen format.


Select a Team where you desire the new roster formatting. On the drop-down under the Admin tab, click Team Information & Permissions. On the Edit Team screen, scroll to the bottom of the page to the Advanced Team Roster Settings, seen below.

Advanced Team Roster Settings

You may choose a Data Merge Report to replace the default information displayed for the individuals on the Team Roster. By choosing a wizard from the field below, additional information may be gathered from your users for display on the roster.

Warning: If a wizard and a report are both chosen from the fields below, then the categories added by the wizard **MUST** match the categories selected when constructing the merge report.

Data Merge Report	<input type="text" value="Roster Report"/>
Relate User Wizard	<input type="text" value="Roster Information"/>

Using the field drop-down , access the Data Merge Report list. Select from the list the merge report that was constructed for the roster. If you desire to have users fill out their own information



for the roster through a wizard, access the Relate User Wizard drop-down using the field drop-down. Select from the list the wizard that was constructed for the roster. When complete, click the Save button. In the example above, the merge report constructed was titled Roster Report and the wizard was titled Roster Information. Click the Save button when done.

When the screen repaints, click the Team Roster link on the navigation bar. The new formatting applies on a per person basis. The new information will become available on the roster screen as soon as each individual completes the wizard. The illustration below shows the appearance of a sample roster format after all Team members have filled out the additional wizard information.

Team Roster - Development Team

Team Lead

The primary team lead for this team.

Andrew Aaronson

Team Members

Name Search:

-- Committee Search --

Andrew Aaronson ★

aaaron@tempo.com

(777) 444-3333

UT, USA

Certifications: Ph.D, ACE

Training: karate

Interests: river running, racquetball

Carla Campbell

ccbell@midline.net

(555) 444-3333

CO, USA

Certifications: Ph.D, RCN

Training: first aid, shiatsu

Interests: gardening

Eric Ender

theedge@hhst.com

(777) 999-3333

UT, USA

Certifications: MA, Ph.D

Training: karate

Interests: birdwatching

Ben Brower

bbrower@archway.com

(777) 222-3333

AL, USA

Certifications: MD, ACPS

Training: Scouting

Interests: golf

Donna Devner

ddev@anglia.com

(777) 444-7777

CA, USA

Certifications: ACMP

Training: instrument-rated pilot

Interests: tennis

Frances Fatley

afaroff@tandem.org

(777) 444-8888

OR, USA

Certifications: Ph.D, FACE

Training: short-wave radio

Interests: quilting, watercolor

★ Team Leads

Invited Members

Invited members who have not yet joined the team.

There are currently no invitations.

Most organizations have several Teams. Any, some or all Team rosters can either be customized or left in the default format. You may decide to have identical custom data available on all rosters or to customize each one separately. You may create as many different screen formats as you would like by creating separate forms, categories, merge reports and wizards for each format desired. For each desired format, follow the five (5) processes outlined above.

All the examples given are basic choices and settings for roster formats. By experimenting with a combination of Data Merge Report features, Relate Forms and permissions, you can construct more sophisticated formats to supply specialized data display needs.



Step-by-Step in Formatting the Roster

Building the Relate Form

- Select Relate on the drop-down from the Tools button
- Click Relate Forms from the Relate Admin drop-down
- Click the New Form button
- Enter a form name
- Type in a description, if desired
- Click Show in My Profile, if desired
- Select Single Entry radio button
- Mouse over New Data Field button
- Select a field type
- Enter data required by the field type
- Click the Save button
- Repeat for as many fields and types as needed
- Select at least one Summary Field

Permissions

- Click the Permissions tab
- Click the Add Group button
- Select the Team Licensees link
- Set Relate Self to Editor permissions
- Set Team Licensees to Reader permissions
- Click the Save button

Setting up a Roster Category

- Click Relate Categories from the Relate Admin drop-down
- Click the New Category button
- Enter a category name
- Type in a description, if desired
- Select the Individual checkbox
- Check the roster form(s) in the Required column
- Click the Save button

Constructing the Data Merge Report

- Click Detail Reports from the Relate Admin drop-down
- Click the New Detail Report button

Name and Record Type

- Enter a report name
- Type in a report description, if desired
- Select the Individual checkbox
- Click the Next button

Record Categories and Usage Options

- Set the category used for the roster to Must Have
- Uncheck all usage checkboxes
- Click the Next button

Report Content

- Enter the text, graphics and layout elements in the Editor box
- Make all text formatting selections
- Click to position the cursor for the first data element
- Click the data insertion icon
- Select a single-entry form from the dialog box drop-down
- Select a field (from the selected form) in the dialog box drop-down
- Repeat insertions as needed
- Click the Next button

Permissions

- Click the Permissions tab
- Click the Add Group button
- Select the Team Licensees link
- Set Relate Licensees to Reader permissions
- Set Team Licensees to Reader permissions
- Click the Save button

Constructing the Data Entry Wizard

- Click Data Entry Wizards from the Relate Admin drop-down
- Click the New Wizard button
- Click the New button associated with the New User Data Entry Wizard

Wizard Identification and Categories

- Enter a wizard name
- Type in a description, if desired
- Check the category used for the roster
- Click the Next button

Form Selection and Order

- Check that all the needed forms are shown on the screen
- Include any optional forms needed
- Change form order, if desired
- Click the Next button

Form Options

- Check all forms under 'Hide if previously completed'
- Click the Next button

Notification and Settings

- Click the Save button

Setting the Team 'Information and Permissions' Page

- Go to the Team home page
- Click Team Information & Permissions from the Team Admin drop-down
- Under Advanced Team Roster Settings, select the report created in the Merge Report step
- Under Advanced Team Roster Settings, select the wizard created in the Data Entry Wizard Step, if desired.
- Click the Save button