



HQ  
Team  
Connect  
Fit2Play  
Relate  
ICare  
Answers4

## Update News – October 2005

We have been very busy here at BlueStep Technologies since our last newsletter. As always, we've focused on improving our product capabilities and creating features that will enhance productivity and expand capacity for our clients.

Below are highlights of the major changes and additions of the last few months. We're anxious for all users of BlueStep products to get the most from Relate™, Connect™, Team™ and HQ™, so please feel free to post this document in your organization's Shared Files or e-mail it to users who may benefit from the information. You may also find this newsletter and past newsletters at the client care site, [www.clientcare@bluestep.net](mailto:www.clientcare@bluestep.net). And if you have any questions about any of the items mentioned, please don't hesitate to contact us and we'll be happy to help you.

### Hot Food, Cool Jazz and Fresh Ideas

As we continue to implement new features, we're anxious to tailor our goals to the needs of our users. Your ideas and the direction of developments in your workplace are important to us. To that end, we are hosting an **Innovator's Summit** on **Friday, January 13<sup>th</sup>, 2006** from 9:00 AM to 3:00 PM, Mountain Time. This event will be held at our new location at **109 West Gentile, Layton, Utah** and is open to all BlueStep/Answers4 clients and users. At this conference, we will be sharing some valuable in-depth user information and an overview of new products and features, plus an update on those applications currently in development. We hope you'll want to share with us your needs and questions, as well as those features you'd like to see added to the BlueStep family of products. Please watch your e-mail for further details and plan to join us.

### Movin' Up

As most of you are aware, at the end of July, BlueStep moved to larger offices with improved data center and support facilities and an even higher level of security. This move was designed to promote our ongoing efforts to serve you better and to protect the choice business relationship we enjoy with each of our clients. If you have not already done so, please update all your contact data for us to the following new information:

BlueStep Technologies (formerly Answers4)  
109 West Gentile Street  
Layton, Utah 84041-3000  
(801) 336-3043 phone  
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(800) 410-0257 toll free (unchanged)

# New and Updated

## Improved Performance

Our technical department has devoted considerable energy to improving online performance and streamlining data storage and retrieval. This has resulted in significantly faster response times, particularly noticeable in retrieving pages with large amounts of dynamic data, such as queries, and in creating and editing records with a large number of forms. Currently, page requests average only 0.5 seconds on our servers before being returned to users. While specific pages may be faster or slower than this time (which does **not** include time used in transmission over Internet connections or that taken by the user's computer to process the received data), you should be experiencing over-all faster responses in critical areas.

In conjunction with these performance improvements, Organization Administrators can check page times for themselves from the new Page Statistics Report. To find it, mouse over the Tools drop-down and select Organization Admin, then scroll to the Reports section. By using the 'From' and 'To' fields, you can even test individual pages on your Connect website (and others) to see if large graphics or multiple queries are slowing down usage for your clients.

## Pop-up Save Warning, Concurrency Errors and Onscreen Messages – All Users

To prevent users from losing information because they missed clicking the Save button, new 'change detection' code has been implemented. If you have made changes to any form or record (or added calendar, news, discussion, etc. items) and then attempted to navigate to another page without saving, a warning pop-up will give you the option of saving the changes or proceeding without them. This code will eliminate any data loss through accidental page exits.

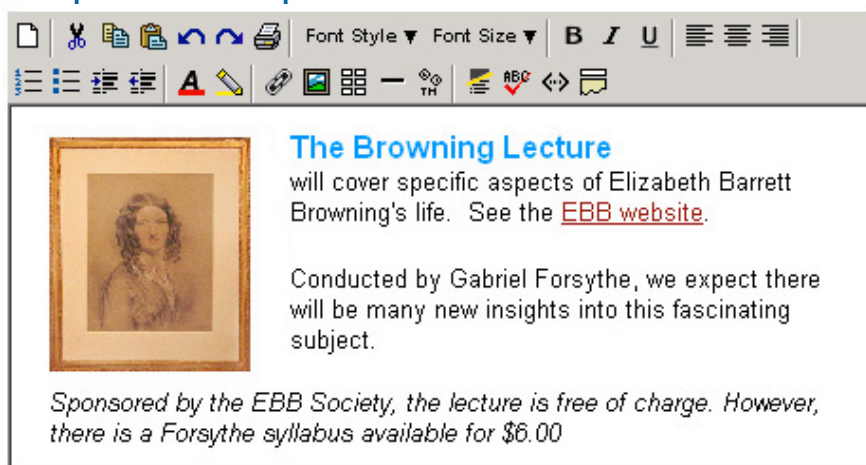
Additionally, data can sometimes be lost if two users are concurrently editing data on the same form at the same time. The changes entered by one individual will overwrite the changes made by the other individual. To eliminate any loss if a concurrency occurs, the initial user will have his/her edits saved, while the second user will receive notification that he/she should close the form without saving, re-open the now-updated (by the initial user) form and re-enter the desired information. While this may prove repetitive for one individual, it guarantees that no over-writes take place and no data is accidentally erased.

Throughout the BlueStep system, the text of many page hints, usage instructions, e-mails, error screens, permission information and login messages have been rewritten for clarity and brevity. We continue to look for ways to simplify usage and communicate effectively wherever we can. If you find something that is unclear or confusing, please let us know and we'll work to further demystify it.

## JavaScript Enhancement and PNG Support – Organization Administrators

Along with textual screen changes, we've taken steps to correct a flaw in Internet Explorer. Previously, IE stripped out all JavaScript stylesheet code entered into any BlueStep Editors.

### Example: The BlueStep Editor





The screenshot shows the BlueStep Editor interface. At the top is a toolbar with various icons for editing text and layout, including options for font style and size, bold, italic, underline, bulleted list, numbered list, indent, outdent, text color, background color, link, unlink, and help. Below the toolbar is a preview window. The preview window contains a framed portrait of a woman on the left. To the right of the portrait is the text: **The Browning Lecture** will cover specific aspects of Elizabeth Barrett Browning's life. See the [EBB website](#). Conducted by Gabriel Forsythe, we expect there will be many new insights into this fascinating subject. At the bottom of the preview window, there is a note: *Sponsored by the EBB Society, the lecture is free of charge. However, there is a Forsythe syllabus available for \$6.00*


With some judicious coding, the engineers here have hoodwinked Internet Explorer into accepting stylesheets, thus returning a great developer's tool to the Organization Administrator. Additionally, Internet Explorer had a negative impact on any PNG files containing transparency. Again, BlueStep engineers created behind-the-scenes code that circumvents the problem and permits correct usage and display of PNG transparencies. This change improves the function of all Media Libraries and Editors wherever they are found throughout the system.


### **BlueStep Editor/Style Features – Organization Administrators, Relate Licensees**

A variety of BlueStep Editor tools (see Editor example above) have been added over many months and may have gone unnoticed by Administrators and Relate Licensees. For a description of all Editor tools, please see the user's guide, "The BlueStep Editor" at [www.clientcare.bluestep.net](http://www.clientcare.bluestep.net). A few of the newest are:

 **Hyperlink** icon produces a pop-up where you can create hyperlinks within the body of any text placed in the editor.

 **Insert HTML** icon allows you to paste raw HTML code into the editor box. This permits the use of code produced on other sites, such as shopping cart buttons, to be directly inserted into your pages. It also allows you to isolate selected portions of code to edit.

 **Reveal HTML** icon opens a display of all HTML code being used within the editor, presenting it in an editable format.

 **Insert Data** icon is used in Data Merge Reports, allowing you to draw information from the fields in single- and multi-entry forms and insert them on a page/pagelet, in HQ™, within Relate™ or in print format.


### **Other Enhancements – HQ Administrators, Connect Users, Organization Administrators**

Other new enhancements to the look of screens and pages include the option to control site Styles functions from the Organization level, the ability to adjust margin widths on Connect pages, optional print links available for the content of specific Connect pagelets (especially useful on Detail Reports), a selection of new HQ icons and customizable background color schemes to color code the HQ home page.

### **Hosted E-mail Domain Manager – Organization Administrators**

It is now possible for organizations to have their own Intramail hosted by BlueStep. For secure transmission of critical data within an organization, Intramail is the perfect answer. It allows Organization Administrators to set up, secure and control user accounts within their own organization. When mail is sent between Intramail accounts, it is not delivered through open Internet connections as standard e-mail is, but is routed directly within our servers. When the e-mail is downloaded by an Intramail user, the message itself is encrypted using the same secure SSL encryption used in the banking industry. Accounts are easy to set up, settings are easy to verify and usage is easily maintainable by your own staff. Contact a BlueStep engineer to help you get started.

### **Integrated RSS Feeds – Team, Relate, HQ, Connect**

Really Simple Syndication (RSS) feeds are the newest trend in Internet notifications. In the same way that MSN Instant Messenger communicates conversation to you in a pop-up, an RSS feed can communicate the digital information of your choice. BlueStep has integrated RSS feeds into Discussions, News, Shared Files, Calendar, Projects, Daily Digest, My Tasks, My Issues, My Calendar, Relate Queries, Relate Reports, and Search. Anywhere that you see the RSS feed button  you can set up a feed on your own computer that will notify you when an event has been added to the calendar, when a task has been assigned to you, when new information has been added to a search you have performed, and many other types of actions. There are help links on the pages accessed by the RSS button and complete instructions in "RSS Feeds" on the client care page at [www.clientcare.bluestep.net](http://www.clientcare.bluestep.net).

### **Calculated and Signature Fields – Relate Admins, Relate Licensees, HQ Licensees**

Two important new functions have been added to the fields available for use on Relate forms: Calculated field and Signature fields.

**Calculated Fields** – Text, Memo, Date/Time, Number and Boolean fields all have a new Formula tab in the header, see screen below. These formula screens can be configured to allow two or more fields on the same form to work together to produce calculated results. Two simple applications of this feature would be displaying the age of an individual and counting categories of items. In the first instance, using the formula screen, a Relate Admin or Licensee can add an age field (number field) and configure the formula to automatically subtract the current date from a birth date field (date field), then display the result. In the second case, counting of line items, such as totaling the number of occupied rooms in a specific building unit, can be calculated using multiple Boolean fields to control results displayed on a query. There are hundreds of applications where multiple calculations from existing data would present valuable information to you and your users and save hours of repeated manual calculations. If you have a need for a calculated field, please let a BlueStep engineer guide you in creating the correct formula to meet your needs.

The screenshot shows a software interface for configuring a formula for a Date/Time field. The window has three tabs: 'Field Information', 'Formula', and 'Permissions'. The 'Formula' tab is selected. The title bar reads 'Date/Time Field Formula (Advanced Feature)' with a 'Help' icon. Below the title bar, there is a 'Field Identifier:' label followed by a text input field containing an asterisk (\*). Below that is a 'Formula:' label followed by a large text area for entering the formula. To the right of the formula text area is a 'Check Formula' button. At the bottom of the window are 'Save' and 'Cancel' buttons.

**Signature Fields** – An entirely new category of field that can be added to forms is the Signature field, which can be one of two types. **Simple signatures** allow a user to attach their printed name, plus the signature date and time to the data contained in any form by simply clicking a checkbox. **Secure digital signatures** are an extremely secure and legally binding method of signing an online document. To use digital signatures, a signed, notarized signature document must be lodged with BlueStep and a secure passphrase chosen, in addition to the standard username and password. Once signed, only an Organization Administrator can remove either of these signatures. For complete information on the creation and application of signatures, please consult the document, “HQ Digital Signatures” at [www.clientcare.bluestep.net](http://www.clientcare.bluestep.net).

#### **Last Modification Date, Last Login – Organization Admins, Relate Licensees, HQ Users**

A new addition to every form viewed in HQ or through Relate is a Last Modified line. This displays the last date and time that changes in data were saved on the specific form you are viewing. A similar feature is the Last Activity line. This allows Organization Administrators to look up the last login date of any user within the system through the User Look-up screen. Both of these help inform and clarify data/system usage on your BlueStep platform.

#### **Wizard and Query Navigation and Searching – Organization Admins, Relate Licensees**

Data Entry Wizards and Queries appear in various forms and formats on Connect pages and pagelets, Team Roster and other screens, HQ pages, and in Relate. Navigation throughout the wizard and query creation process has been rewritten to prevent inadvertent user errors in data caused by edits and updates to the query or wizard.

Secondly, the number and types of search criteria operators have been greatly expanded, particularly for date fields, which now allow query creators to specify dates relative to the current date and perform complex date-based searching functions.

Lastly, when a record is selected from a query, the Record Summary is the default form presented on screen. With the latest code implementation, a query can be set to display a specific form in place of the Record Summary when an individual record is selected from that query. For instance, if a query is being created to report on phone and address information, a field on the display options page will allow the creator to set an appropriate form (Contact Information, for instance) as the default. Subsequently, when a user selects a specific record from the query results, the Contact Information form will be presented instead of the Record Summary and the user may navigate to the summary or any other form on the menu as usual. This eliminates multiple navigation selections where they would be inconvenient and time-consuming.

### **Structure, Treatment Screens, Group Sessions/Notes, Processes – HQ Users**

HQ Administrators now have access to editing functions on HQ Structure. This screen can be found under the Security (Admin) section of HQ and offers a one-page view of all sections, areas and pages within HQ.

Treatment screens in the Services (Clinical) section have been reorganized and clarified, making construction of treatment plans more intuitive and streamlining a number of steps. Additionally, links are now available to print out full treatment plans for paper files. The Group Notes and Group Sessions screens have also been reorganized and the ability to select or deselect members of the chosen group (prior to adding the note or session) has been added to these functions.

The capabilities of customized HQ Processes now include the ability to generate e-mail notifications to task recipients, in addition to creating individual Tasks on the My Office screen. In conjunction with RSS feeds, HQ users have three modes of notification. One, two or all three of these can be used to keep users updated and notified of the latest developments.

### **AdvancedMD and Leonardo Integration – HQ Users**


As announced in our last newsletter, BlueStep has partnered with AdvancedMD to offer medical billing that dovetails with the HQ interface. Now a second, highly-recommended medical billing service, **Leonardo**, also integrates with HQ. This gives our clients choice between two excellent services, each with a variety of great features.

### **Media Library Upgrades – All Users**

The Media Library has been enhanced with a folder organization system in the same mold as the Shared Files folder system. Also like Shared Files, a Media Library shared interface using web folders (WebDAV) is available. Using this interface, users can create a logical drive on their own computers which shares the Media Library located within the BlueStep application. The Add Multiple Files screen has been updated and limits have been set on the length of time document locks actively restrict access to files.

### **Calendar Improvements – All Users**

The reporting of multi-day events has been improved and time zone conversion icons have been introduced to increase the readability and usefulness of calendar entries. Date ranges that appear in the calendar month, week and day views have been updated for consistency throughout all types of events and calendar configurations. Each of these helps make the total calendar function a more user-friendly and refined application.

 We greatly value all of our customers and look forward to our continued relationship. Please let us know if there is anything that we can do to be of assistance or suggestions that you might have.

Sincerely,  
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