BLUEPRINT REPORT USER GUIDE

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Overview

Blueprint Reports display information about each entity and are one of the most vital aspects of SimplyCast's Blueprint app. Reports can be accessed in the dropdown menu on an entity-by-entity basis. Once you have clicked the downward arrow to the right of "View Data", you can click "Reports" to access the Blueprint Report Dashboard.

You can also access the Reports by clicking the "Reports" tab on the left of the main Blueprint Dashboard.

Please note that operating Blueprint Reports requires some prior knowledge of the Blueprint app's core functionality. Therefore, we highly recommend the use of the SimplyCast Blueprint Core Guide before engaging with this Report guide.

For information on Blueprint Form, please refer to the Blueprint Form Guide.

Blueprint Report Dashboard

To begin creating and managing your Blueprint reports in the SimplyCast platform, first navigate to the Blueprint Report Dashboard as described above. Once you have done this, the Blueprint Report Dashboard will be displayed.

From the Blueprint Report Dashboard, you can:

Create a New Report

You will notice a green "Create New Report" button at the top left-hand side of the Blueprint Report Dashboard.

This button will open a drawer on the right-hand side of your screen where you can name your new Report and set the basic parameters. (By parameters, we mean selecting the entity you want to generate a report on, as well as who will own this report.) Once this is done, click "Create Report" in the lower right.

You can also select "Bypass Entity Visibility" here, which will show the report even for users without access to view the entity the report is for.

Delete Report(s)

To delete a report, check the box to the left of the report(s) you wish to delete. A red “Delete Reports” button will appear at the top of the page alongside the “Create New Report” button. You will then be prompted to confirm the deletion. Check the box to confirm and then click “Delete” to finish deletion of the report.

Publish and Unpublish Report

Reports can be published or unpublished from the main dashboard as well. Ordinarily you would publish a report by completing the workflow naturally.

Click the arrow button to the right of the “View Report” or “Edit Report” buttons. In the dropdown menu, “Publish” or “Unpublish” can be seen depending on the status of the report. (You cannot publish an already published report, for instance.)

Note: If you edit an already published report, you will need to complete the workflow again to make your changes publicly available.

Share Report(s)

Also in the right-hand dropdown menu is the option to share a report. This will make the report visible to users that might not ordinarily have had access. You can dictate what permissions that user will have for this report on an individual level as well.

Reset Edits

Found in the upper right of the preview window, this button will reset all changes made since the form was last published. To save changes fully, you must complete the editing process and republish the report. Unlike an ‘Undo’ button, this will apply to any changes made since the last save, so it is recommended that you manually saving your changes for peace of mind and to prevent loss of data.

Edit Report Actions

This button allows you to edit report-wide actions:

- **Create an Alert to Related Contacts:** Creates an alert message that will be sent to contacts in a Related Contacts field.
- **Open Create Form:** Opens a form to create new records.

Note: There are conditional clauses that can be created to restrict access to these actions and define the acceptable contexts for activation under certain circumstances. See below for further information.

Report Action Conditional Settings

Permission Clause Options:

- **Does not have Permission**
- **Does not have Role**
- **Has Permission**
- **Has Role**

Context Clause Options - To test Context clauses, you must first select an entity and then a field. After that, you can complete the context clause with data that can be found in the conditional information in the **Edit Instance Actions** section. Multiple conditions can be created to ensure that only specific people can perform these wide, sweeping actions and only under the right conditions.

Blueprint Editor

Configure Columns

Navigate to the “Report Preview” screen either by clicking on “Edit Report” for an existing report or by creating a new report. By default, your report will include the mandatory name field and nothing else.

The section on the right will be labeled “Configure Columns”. You can use this to add additional columns and languages and change how the report is sorted.

The options available on this page are as follows:

Languages: Designate which languages you would like your report to support. **Please Note:** this will not serve as an automatic translator; you will need to input unique language settings for each language such as Labels and other important information.

Add Column: Open the “Add Column” drawer which you can use to edit the column in question.

Sort Column: Choose a column or set of columns and sort their information in ascending or descending order.

Group By: Group a column by the responses in it. For example, if you choose to group a Boolean (Yes or No) field, it will create rows for each of the valid responses.

Columns are associated with fields on the entity that you are collecting a report on and are defined using the **Field** dropdown menu. Columns allow you to generate a report that contains select, focused information no matter how many fields have been added to a given entity, and help cut down on visual clutter by allowing you to restrict the display to only what you need to see at that moment.

For a comprehensive list of the fields you can add to an entity, please refer to the Blueprint Core User Guide. The only columns you can add that will not be on this list are “Date Created”, “Date Modified”, and “Owner”. These three columns contain information related to the creation, modification, and owner of the instance.

Now we will discuss the “Add Column” settings.

Add Column

In the “Add Column” drawer, you will see various settings that dictate which information the report displays and accesses from the entity records:

Labels: Define titles based on the languages you have added to the report.

Function: Add a function to the column to change how data is displayed or provide additional context.

Operations: Operations are modifying tools that can be applied to certain functions. They are not available for every field. Operations can be configured to use a static value or perform the operation using two or more fields together. Furthermore, a given column can be configured to perform multiple operations.

Operations include:

- **Addition:** Performs the addition of number values in number related fields such as integer, decimal, etc.
- **Concatenate:** Allows the user to combine information from two or more fields into a single column of the report. For example, if I were to concatenate an integer field with an email address field, the respondent’s email would appear in the new concatenated column attached to the integer value that the respondent submitted.
- **Division:** Performs division of number values in number related fields such as integer, decimal, etc.
- **Modulo:** Performs modulo division on two different number fields.
- **Multiplication:** Performs multiplication of number values in number related fields such as integer, decimal, etc.
- **Subtraction:** Performs subtraction of number values in number related fields such as integer, decimal, etc.

Column Size: This slider allows you to change column sizes from the default by expanding or limiting their size in pixels.

Word Wrap: These two options change how entries are displayed. “Truncate” will cut off the entry after a certain point, while “Wrap” will cause the entire text to be visible. This is particularly important for fields like “Long Text” if the user needs to see the whole response.

Display As Link: This checkbox allows you to make the text in this column display as a hyperlink. This allows the viewer to click on the text to be taken to another URL either in the current tab or in a new tab.

For a list of the functions in the Function menu, see below.

List of Report Functions

Reports have several functions beyond simply displaying information contained in the Blueprint fields. These functions can add further context to the displayed information and perform as follows:

Count: Count each of the responses and track the quantity of a specific type of response. This must be used in combination with Groups.

Average: Combine with the Group rules to calculate the mean average of a numbered field such as “Integer” or ”Decimal”.

Max: Displays the maximum value of the field in the column.

Min: Displays the minimum value of the field in the column.

Sum: Displays the sum total value of the field in the column.

Please note: The functions listed above are aggregate functions and can be used in conjunction with the Group function to provide the maximum, minimum, or sum for the entire grouped segment of your data. These are only to be used with Number fields such as “Integer” or “Decimal”.

Absolute Value: Changes any negative numbers in a number field to positive ones.

Date Format: Determines how dates are formatted or sets a fixed value. Date and time formats are selected from a dropdown menu that contains several options to account for different date formats, as well as a 12- or 24-hour clock.

Day: Tells the user the day of the month with which a piece of data is marked. This could be a date input by the form, or a date on which the record was created or modified.

Day Name: Tells the user the day of the week with which a piece of data is marked. This could be a date input by the form, or a date on which the record was created or modified.

Month: Tells the user the month of the year with which a piece of data is numerically marked (6 for June, for example). This could be a date input by the form, or a date on which the record was created or modified.

Month Name: Tells the user the name of the month with which a piece of data is marked (June, July, August, etc). This could be a date input by the form or a date on which the record was created or modified.

Year: Tells the user the year with which a piece of data is marked. This could be a date input by the form, or a date on which the record was created or modified.

Once you have selected your functions and finished configuring columns, you can click “Next” to progress.

Edit Instance Actions

From the Configure Instance Actions dashboard, users can change languages and add actions.

Actions are buttons that can be placed on the report that will allow the user to perform certain functions automatically.

To see your other options, click “Add Action”. “Column Labels” will allow you to set labels for the “Actions” column in each language that you have added to your form, and ”Button Color” will change the color of the Action button on the report.

Please note that some of these actions require further user interaction. For example, the “Navigate to URL” action will require the user to input a valid URL.

The actions that can be added to the report are as follows:

Delete Instance: Delete the record as soon as the action is triggered using the action button.

Export Calendar File: Export the file containing the necessary date fields to add them to a calendar.

Navigate to URL: Clicking the action button will take the user to a new URL of the creator’s choosing.

Open Update Form for Instance: Opens the record’s update form once it has been triggered using the action button.

Open Create Form: Opens the form to create a new instance once it has been triggered using the action button.

Share Instance: Shares the instance with others on the account using the action button.

Trigger a 360 Flow with This Instance: Triggers a 360 flow using the information in the instance.

Update Instance: User can designate field(s) and value(s). They can also use this Action to update the instance and force the static designated value to become the value for that field. For example, if you have an approved status for an applications field, you can use this to set all entries in the applications field to approved.

Update Instance with Confirmation: Update the record once it has been viewed by the user and triggered using the action button. Triggering this action will confirm the update.

Once an Action has been selected, the user can set conditions under which the Action can be taken. These conditional rules can be divided into a few groups:

Value Conditions: Conditions related to the value in the designated field. These include:

- Contains
- Does not contain
- Does not start with
- Does not end with
- Ends with
- Is empty
- Is equal to
- Is not equal to
- Is not empty
- Starts with

Date Conditions: Conditions that are unique to date fields. These can be entity fields such as the “Date” or “Date and Time” fields, or they can be automatically generated fields such as “Date Created” or “Date Modified”. The date conditions are as follows:

- Comparison
- After absolute date/time
- After relative date/time
- Before absolute date/time
- Before relative date/time
- Within the past
- Within the next

Choice Conditions: Conditions that are specific to fields like dropdown or multi-select fields.

- Does not have any of
- Does not have all of
- Has any of
- Has all of
- Has options other than
- Is empty

- Is not empty
- Only has options from

Number Conditions: Conditions that apply to fields such as integer and decimal fields. These include:

- Is empty
- Is equal to
- Is greater than
- Is greater than or equal to
- Is less than
- Is less than or equal to
- Is not equal to
- Is not empty

Click “Add Field Clause” to add another field related condition like those listed above.

Add Permissions Clause

The other button present in conditional visibility is “Add Permissions Clause”. Clicking this adds a conditional rule that only allows the action to be seen by certain users who have the correct permissions. The Permissions Clause conditions are as follows:

- Does not have permission
- Does not have role
- Has permission
- Has role

These allow creators of the report to restrict actions to someone who has a specific permission or role, or to all users without specific permissions or roles.

Report Filters

Filters are a useful tool that further refine a report’s available data. Using the conditional logic tools above, users can dictate that only a certain subset of the initially revealed data be contained in the report. For example, if I have included a Boolean (yes or no) field in my entity and put that field into a column on the report, I can then make only “Yes” responses visible using filters.

Remember that the logic you build using the conditional tools is to dictate what is visible, not what is hidden.

Configure Views

The last set of options users can apply to a report are views. Views help to create visual representations of data that can be displayed on a CommandHub dashboard.

There are two types of view that can create a widget for the report Dashboard. These can be selected from the dropdown menu and added by clicking “Add View”:

Bar Chart: Displays data from your report in a bar chart format. There are several settings to configure here:

- **View Name:** The name that users will see when looking at this view on the Dashboard. This is determined by the report creator.
- **Layout:** Choose between “Basic”, “Cumulative Stack”, and “Percentage Stack”. These settings perform the following functions:
    - **Basic:** Displays each series as a separate bar on the graph, presenting the categories distinctly by both color and placement.
    - **Cumulative Stack:** Displays each series as a single bar on the graph, presenting the series distinctly by color.
    - **Percentage Stack:** Displays each series as a single bar on the graph, presenting the series distinctly by color based on how much each series contributes to the total.
- **Orientation:** Orients the way that information is displayed. There are four possible settings: “Vertical bottom to top”, “Vertical top to bottom”, “Horizontal left to right”, and “Horizontal right to left”.
- **Show Data Labels:** This checkbox determines whether users can read the values contained in the bars or not.
- **Category:** Categories represent the types of data being pulled and will be selected from a column of the report. In vertical orientations, categories are your horizontal axis. In horizontal orientations, Categories are your vertical axis. This data will display the labels of each bar in the graph.
- **Series:** Series are your vertical axis in vertical orientations. In horizontal orientations, Series become a horizontal axis. This is the data that is pulled to be displayed as your values.
- **Chart Title:** This user-input title must be manually created and needs to be repeated for each language on the report.
- **Legend:** Determines the location and alignment of the legend on the bar chart.
- **Language Mapping:** Determines the language of the display view from a library of options. Please note that these options will auto-populate translated terms into the view

only for application-specific words. This means that creator- or respondent-generated information such as responses or the chart title will be in whatever language they are submitted in.
- **Component Visibility:** These checkboxes will determine the columns, instance actions, and report actions available to this view. To see these settings on the actual report, click on an individual bar or calendar event and a drawer will open. Report actions will be visible near the top of the screen in the right-hand corner.

Calendar: Informed by date fields, Calendar view displays reports based on when they were submitted or modified. There are several settings to configure here:

- **View Name:** The name that users will see when looking at this view on the Dashboard. This is determined by the report creator.
- **Default Display:** Determines whether the default display is a day, week, or month.
- **Event Label:** This dropdown allows the creator to choose a report column to use as a label.
- **Event Start Field:** This dropdown chooses the date field to use when selecting an event's start on the calendar view.
- **Event End:** The radio buttons for event end select if the event end is designated by a date field, or if the event duration is dynamic or static. Selecting "Date Field" with an Event Start Field selected will allow the creator to choose a field to designate event ending. It is important to know that "Start" and "End" fields must be the same type. Users cannot start from a date and time field and end with a date field. Otherwise, they will be asked to provide the event duration in minutes or days depending on the column you have used either by choosing a new numeric column—that is, an integer or decimal column (Dynamic) or by entering a fixed amount of time (Static).
- **Language Mapping:** Using a library of options, Language Mapping lets you determine the language in which your form is viewed. Please note that these options will auto-populate translated terms into the view only for application-specific words. This means that creator- or respondent-generated information such as responses or the chart title will be in whatever language they are submitted in.
- **Component Visibility:** These checkboxes will determine the columns, instance actions, and report actions available to this view. To see these settings on the actual report, click on an individual bar or calendar event and a drawer will open. Report actions will be visible near the top of the screen in the right-hand corner.

Crosscheck

Once your report settings have been arranged as needed, you can click the “Next” button at the bottom right of the screen to navigate to the crosscheck screen. Crosscheck identifies issues with the form and tells you if it can be published based on a simple green, yellow, and red system.

Green items can be published without problems, yellow items may have some issues, and could be refined slightly, and red issues will prevent the report from being published.