

# InPhase 23

Release Notes

*23.0.0*

*January 2024*

*Commercially Confidential*

## Contents

|                              |    |
|------------------------------|----|
| INPHASE 23 .....             | 3  |
| Audit Deployment.....        | 3  |
| First Time Deploy .....      | 4  |
| Existing Deployment .....    | 9  |
| Task Attachments .....       | 11 |
| Patient Demographics .....   | 15 |
| Named Anchors .....          | 17 |
| Breaking Changes .....       | 20 |
| Important Changes .....      | 20 |
| Change Log.....              | 21 |
| Previous Service Update..... | 24 |

## INPHASE 23

### Audit Deployment

InPhase 23 provides the ability to deploy an Audit to your organisational structure. It utilises two object types:

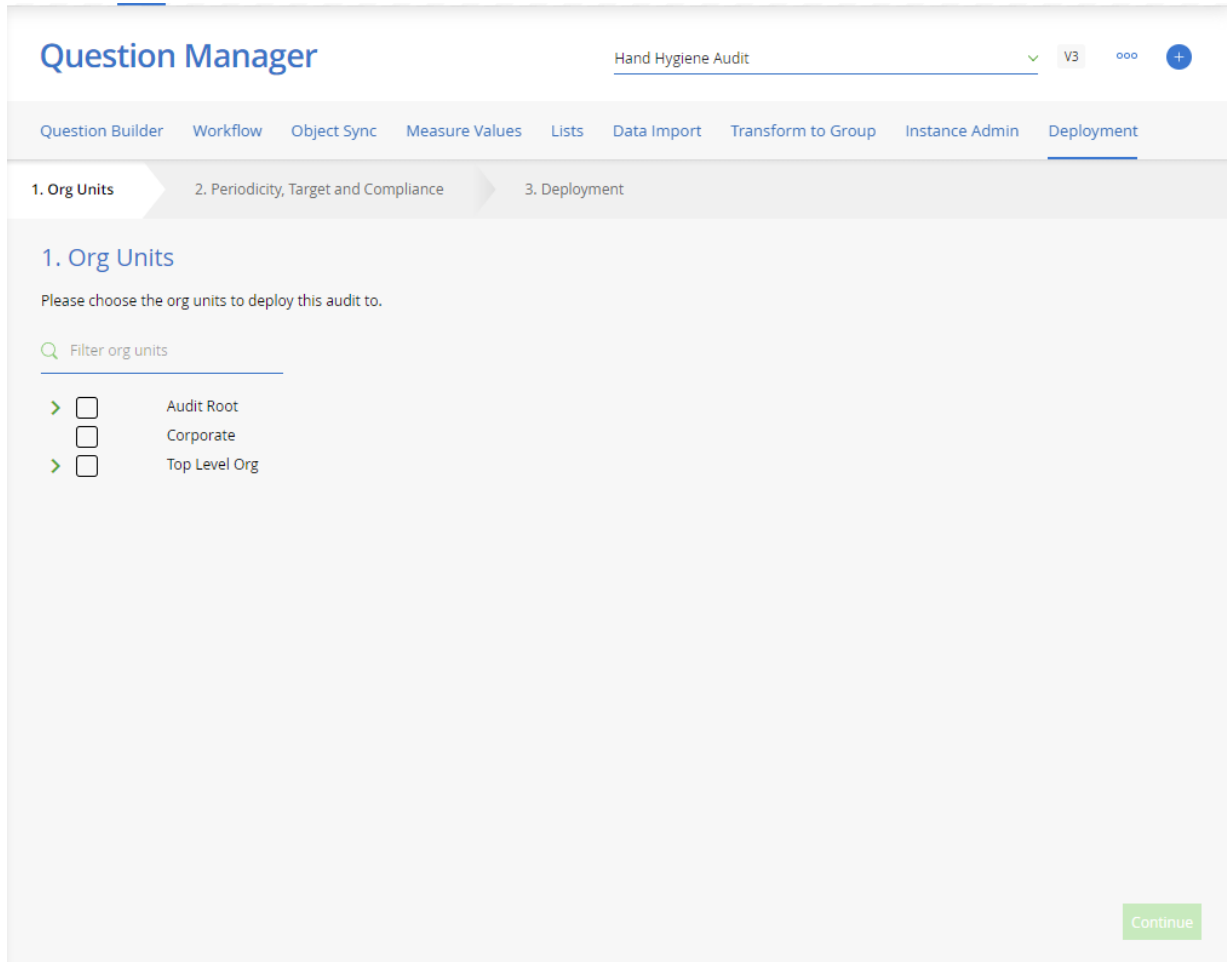
- **Audit Inspection (#AI)**  
This object type is used to capture individual Audits within an Organisational Unit.
- **Audits Summary (#AG)**  
This object type is used to summarise/aggregate the data from multiple organisational units and provides the ability to report at different levels within your organisational structure.

When an Audit Inspection is deployed, an Audit Summary will be deployed to all ancestor organisational units. These will be automatically linked, and data will be aggregated from the Audit Inspection objects all the way to the root organisational unit.

**NOTE:** If you already have Audits deployed, an InPhase Consultant will need to assist with updating reports to work with the automated structure.

## First Time Deploy

On Audits and Surveys, the Deployment tab is available to deploy an audit to the organisational structure:



The screenshot shows the 'Question Manager' interface for a 'Hand Hygiene Audit'. The 'Deployment' tab is selected, and the '1. Org Units' step is active. The interface prompts the user to 'Please choose the org units to deploy this audit to.' and provides a search bar labeled 'Filter org units'. Below the search bar, there is a list of three org units, each with a green chevron icon and an unchecked checkbox:

- >  Audit Root
- >  Corporate
- >  Top Level Org

A green 'Continue' button is located at the bottom right of the form.

The organisational structure is shown as an expandable tree. Your organisation may have one or multiple root organisational units which are controlled by your Organogram in the 'People' area of Administrator.

### 1. Org Units

Please choose the org units to deploy this audit to.

Filter org units

- Audit Root
  - Dept2
    - Dept3
      - Level 1 - A
        - Level 2 - AA
          - Level 3 - AAA
          - Level 3 - AAB
        - Level 2 - AB
          - Level 3 - ABA
          - Level 3 - ABB
- Corporate
- Top Level Org

To deploy an Audit Inspection object to capture individual audits, click on the checkbox:

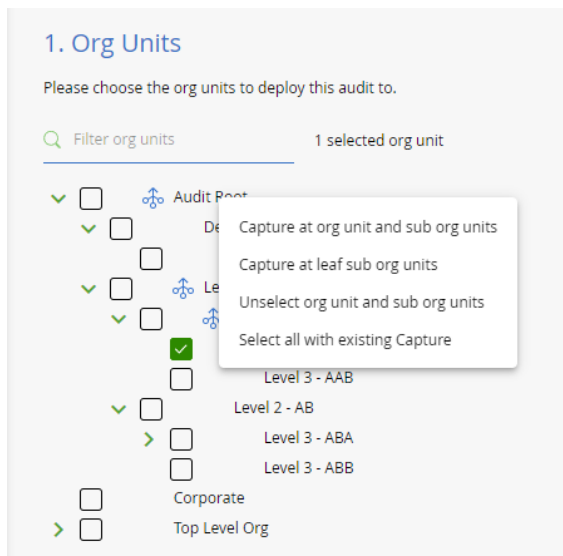
### 1. Org Units

Please choose the org units to deploy this audit to.

Filter org units 1 selected org unit

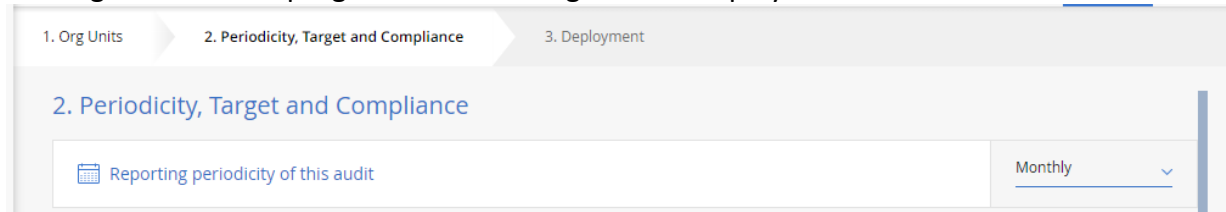
- Audit Root
  - Dept2
    - Dept3
      - Level 1 - A
        - Level 2 - AA
          - Level 3 - AAA
          - Level 3 - AAB
        - Level 2 - AB
          - Level 3 - ABA
          - Level 3 - ABB
- Corporate
- Top Level Org

This will automatically show the aggregation path that will be created to all ancestors. Right clicking on an organisational unit will show the following options:



- **Capture at org unit and sub org units**  
This will check the selected org unit and all descendant org units
- **Capture at leaf sub org units**  
This will check all descendant org units that do not have and children (leaf)
- **Unselect org unit and sub org units**  
This will uncheck the selected org unit and all descendant org units
- **Select all with existing Capture**  
If the Audit has already been deployed, this will check organisational units where there are existing Audit Inspection objects. This is useful for updating existing settings.

Clicking continue will progress to the settings for the deployment:



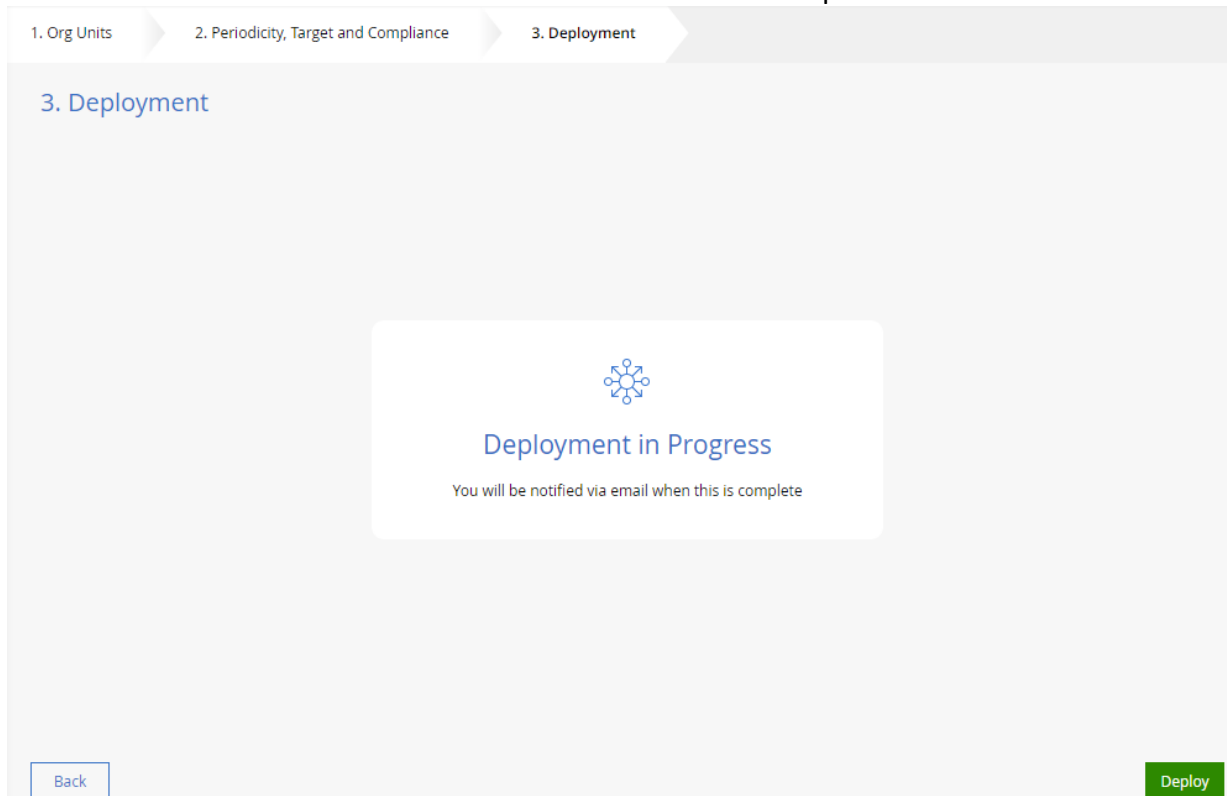
You can select:

- Reporting periodicity of this audit  
This sets the planning pattern for the Measures e.g. Monthly, Annual
- Performance Scheme  
This sets which Performance Scheme is used in the Measures for reporting
- Target number of audits to complete in each reporting period  
This sets the default number of audit instances that need to be completed. This target is then used with performance tolerances using Absolute Variance (count away from target) for showing performance in reports.  
InPhase will create two measures for the count:
  - Audit #  
The actual count of Audits completed. This can be more than the target.
  - Audit # Normalised  
The count of Audits completed limited to the target value.
- Target percentage of audits to be completed in each reporting period  
This sets the default percentage target for the number of audits completed in a period, limited to 100%. This target is then used with performance tolerances using Absolute Variance (percentage away from target) for showing performance in reports.  
InPhase will one measure:
  - Completion %  
The actual count of Audits completed. This can be more than the target.
- Aggregation Type
  - Sum  
This adds the values from all children.
  - Average  
This generates an average from all children.
- Accumulation Type

- Latest – This is used for Audits where only the latest count. Often this will be a single Audit per period with the ability to redo the Audit in that period if needed.
- Average – This is used where multiple Audits are required and each Audit counts.
- Override Existing
  - Existing deployed Audit Inspection object will only be updated with new settings if this is checked.


Clicking 'Continue' will progress it to the summary for the deployment. Here, the selection and the actions that will be taken are displayed. The Audits can then be deployed.

Depending on the number of Audit Inspection objects deployed, this may take a significant amount of time and an email will be sent to the user once complete.



1. Org Units   2. Periodicity, Target and Compliance   3. Deployment

### 3. Deployment

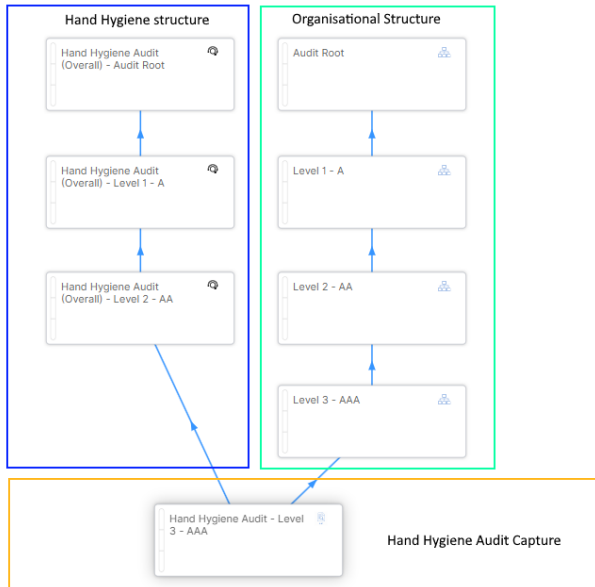


**Deployment in Progress**

You will be notified via email when this is complete

Back   Deploy

Within InPhase, you will see a hierarchy created to match the organisational structure for that specific audit. The left shows the structure for the Hand Hygiene Audit, the right shows the organisational



I'm a

### Existing Deployment

When going to the Deployment tab, any existing deployments will be shown:

### 1. Org Units

Please choose the org units to deploy this audit to.

Filter org units

- Audit Root
  - >  Dept2
    - Level 1 - A
      - Level 2 - AA
        - Level 3 - AAA
        - Level 3 - AAB
      - >  Level 2 - AB
    - Corporate
  - >  Top Level Org

### 1. Org Units

Please choose the org units to deploy this audit to.

Filter org units

- Audit Root
    - >  Dept2
      - Level 1 - A
        - Level 2 - AA
          - Level 3 - AAB
        - >  Level 2 - AB
      - Corporate
    - >  Top Level Org
- Capture object has already been deployed

### 1. Org Units

Please choose the org units to deploy this audit to.

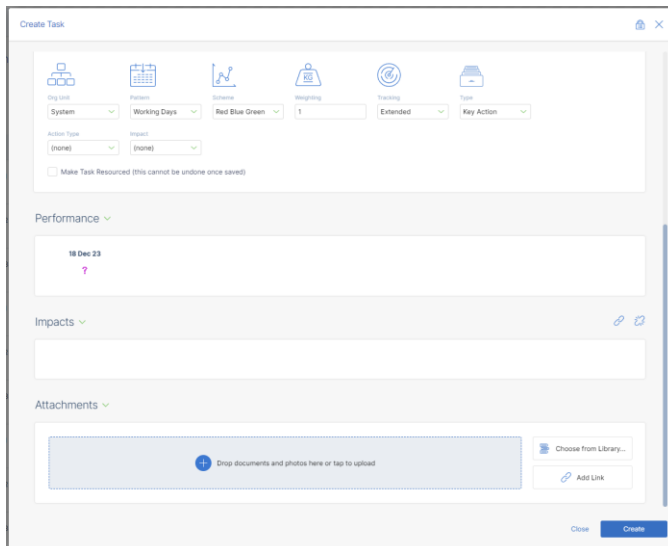
Filter org units

- Audit Root
    - >  Dept2
      - Level 1 - A
        - Level 2 - AA
          - Level 3 - AAA
          - Level 3 - AAB
        - >  Level 2 - AB
      - Corporate
    - >  Top Level Org
- Aggregate object has already been deployed

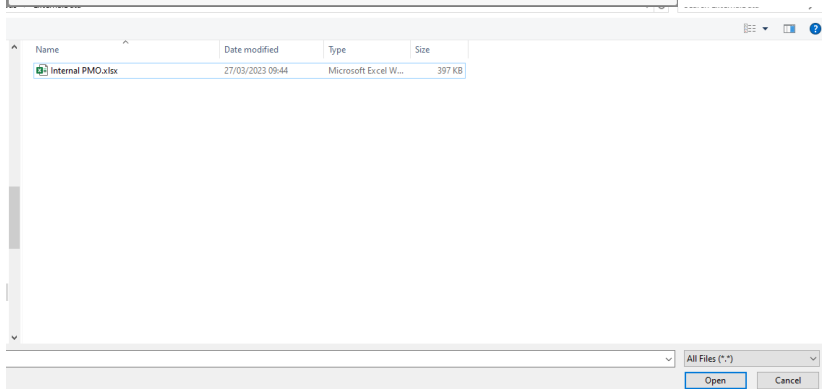
## Task Attachments

InPhase now supports file attachments and links on Tasks. Using an interface consistent with Questionnaires, the user can attach existing files, upload new or add links to URLs.

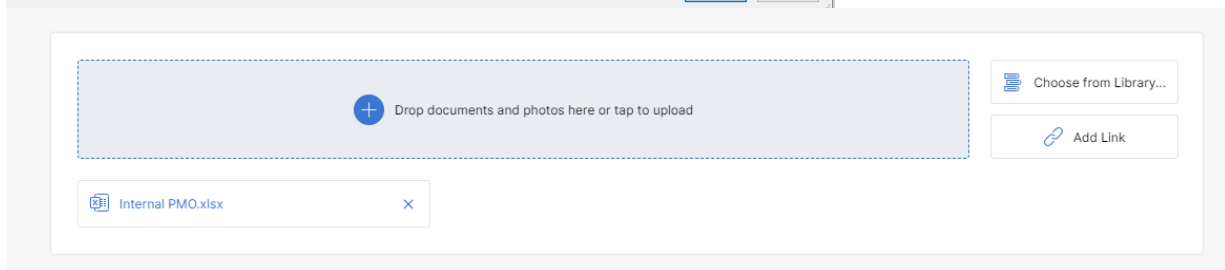
Adding a document:



The 'Create Task' form includes several sections: 'System' (System, Working Days, Red Blue Green, 1, Extended, Key Action), 'Action Type' (phone, phone), 'Performance' (18 Dec 23), 'Impacts', and 'Attachments'. The Attachments section features a large dashed box for file uploads, a 'Choose from Library...' button, and an 'Add Link' button.

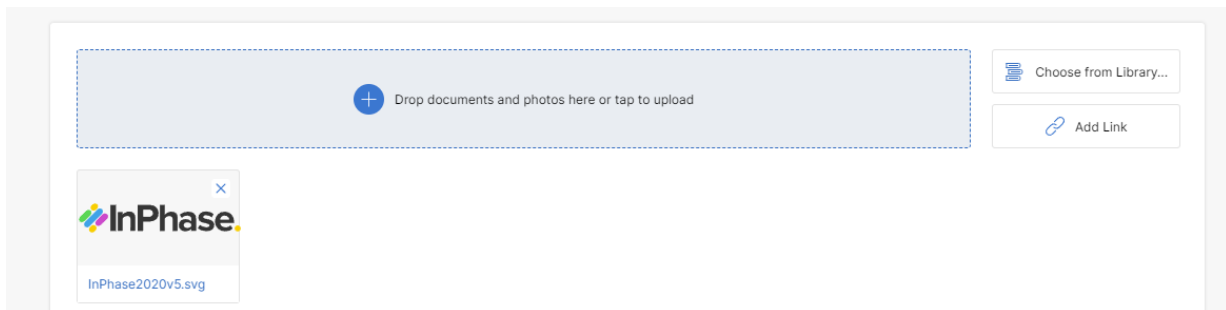
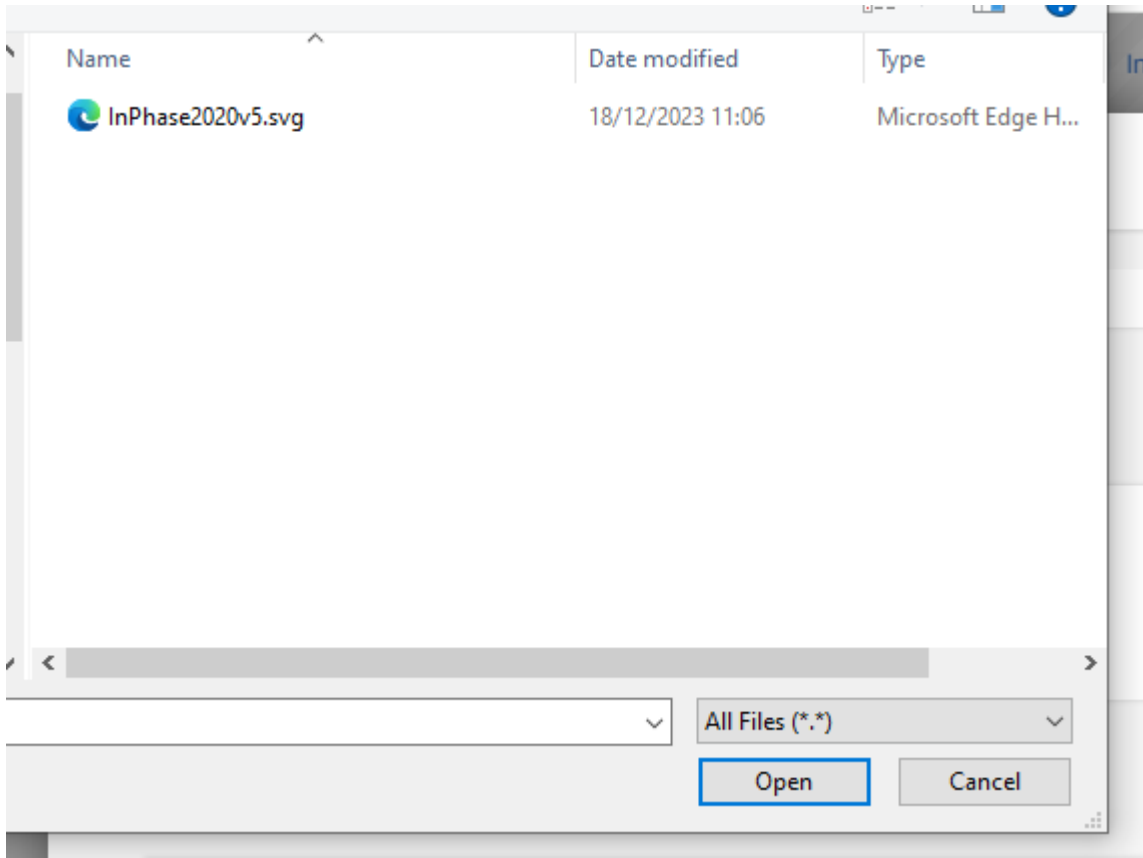


| Name              | Date modified    | Type                 | Size   |
|-------------------|------------------|----------------------|--------|
| Internal PMO.xlsx | 27/03/2023 09:44 | Microsoft Excel W... | 397 KB |

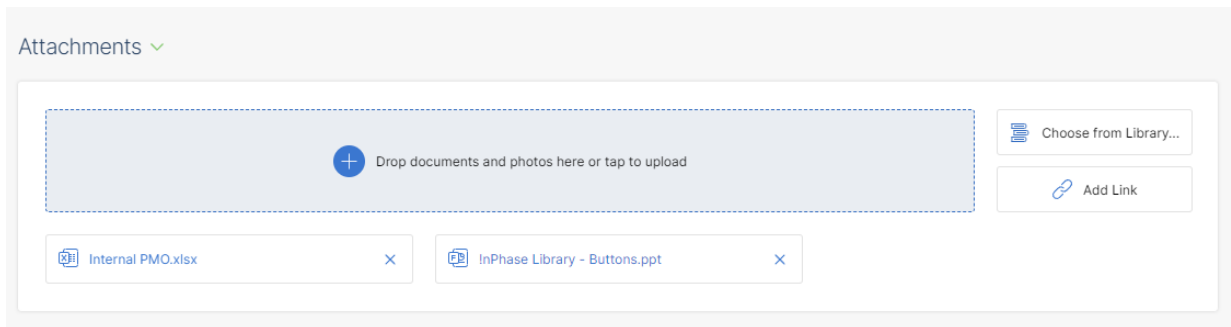
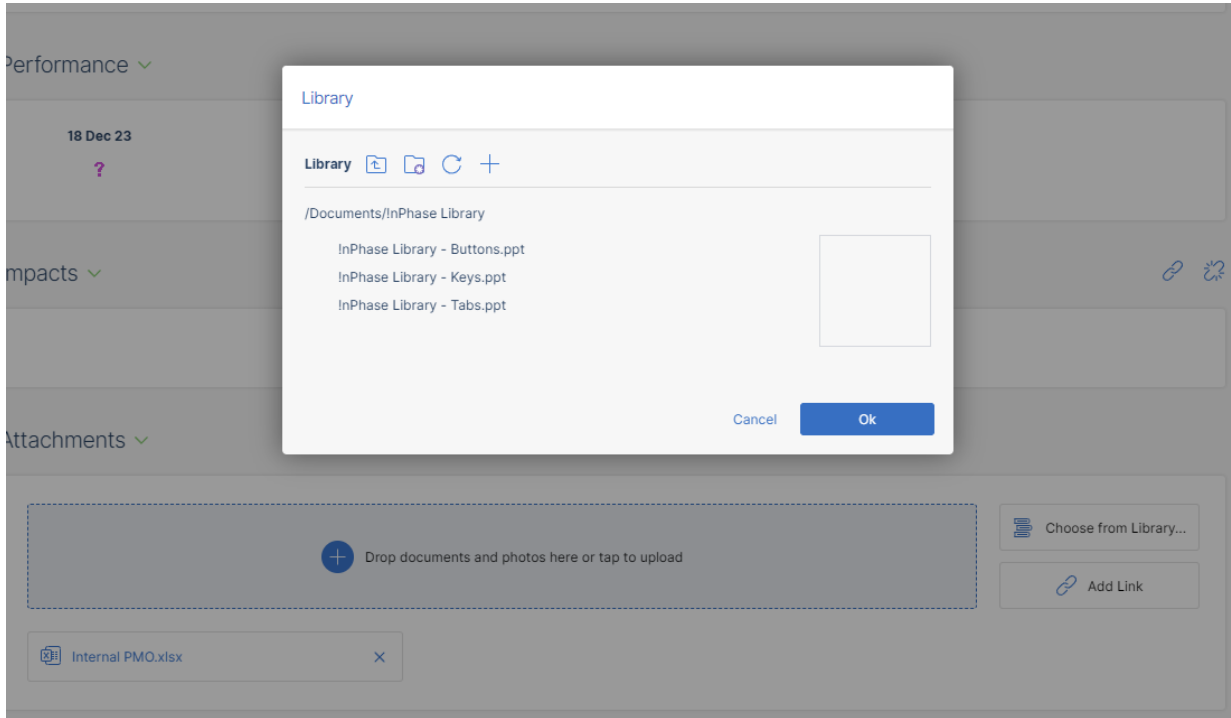


This close-up shows the 'Attachments' section with a dashed box for uploads. Below the box, the file 'Internal PMO.xlsx' is listed with a close button. To the right are 'Choose from Library...' and 'Add Link' buttons.

Adding an Image:





Adding from the library:




## Adding a Link:

attachments ▾

 Drop documents and photos here or tap to upload


 Internal PMO.xlsx ×


 InPhase Library - Buttons.ppt ×

Description

URL

Https ▾

 Choose from Library...

 Add Link

## Patient Demographics

InPhase now supports retrieval of patient demographics from an Azure SQL Database and HL7.

If this feature is required, please contact your Account Manager due to the extra Infrastructure setup that may be required.

Example questionnaire using Azure SQL Database:

### Affected Patient

|                 |  |   |
|-----------------|--|---|
| NHS Number      | <input type="text" value="NHS Number"/>                            | <input type="button" value="Search"/>   |
|                 | <input type="button" value="Or search for a patient manually..."/> |   |
| Hospital Number | <input type="text" value="Hospital Number"/>                       | <input type="button" value="Search"/>   |
|                 | <input type="button" value="Or search for a patient manually..."/> |   |
| First Name      | <input type="text" value="First Name"/>                            |   |
| Surname         | <input type="text" value="Surname"/>                               |   |
| Date Of Birth   | <input type="text" value="dd/mm/yyyy"/>                            | <input type="button" value="Calendar"/> |

User can search by NHS Number, local hospital number or via a pop up. The pop up allows searching by the Patient's information. Results are limited to 10 patients as to prevent end users pulling back too many patient's details.

### Patient Search

|                 |   |   |
|-----------------|---|---|
| <b>Criteria</b> |   | 0 Results                                   |
| First name      | <input type="text"/>                      |   |
| Last name       | <input type="text"/>                      |   |
| Date of birth   | <input type="text" value="dd/mm/yyyy"/>   | <input type="button" value="Calendar"/>     |
| Ward            | <input type="text" value="in"/>           | <input type="button" value="X"/>            |
| Religion        | Diagnostic Imaging                        |   |
| Gender          | Endocrinology                             |   |
| Ethnicity       | InPhase Ward                              |   |
|                 | <input type="button" value="Clear form"/> | <input type="button" value="Search"/>       |
|                 | <input type="button" value="Cancel"/>     | <input type="button" value="Use Selected"/> |

Once the correct patient has been found, they can be selected.

### Patient Search

| Criteria  | 1 Results                                   |
|---|---|
| <div><p><b>InPhase Consultant</b> <input checked="" type="checkbox"/></p><p><b>NHS</b> 9999999999 <b>DOB</b> 09 Mar 1952</p><p>Hospital Id<br/><b>654321</b></p><p>Ward<br/><b>InPhase Ward</b></p><p>Most recent Team<br/><b>InPhase Ward</b></p><p>Gender<br/><b>Male</b></p></div> |   |
| <input type="button" value="Cancel"/>   | <input type="button" value="Use Selected"/> |

The Patient details are then updated in the questionnaire.

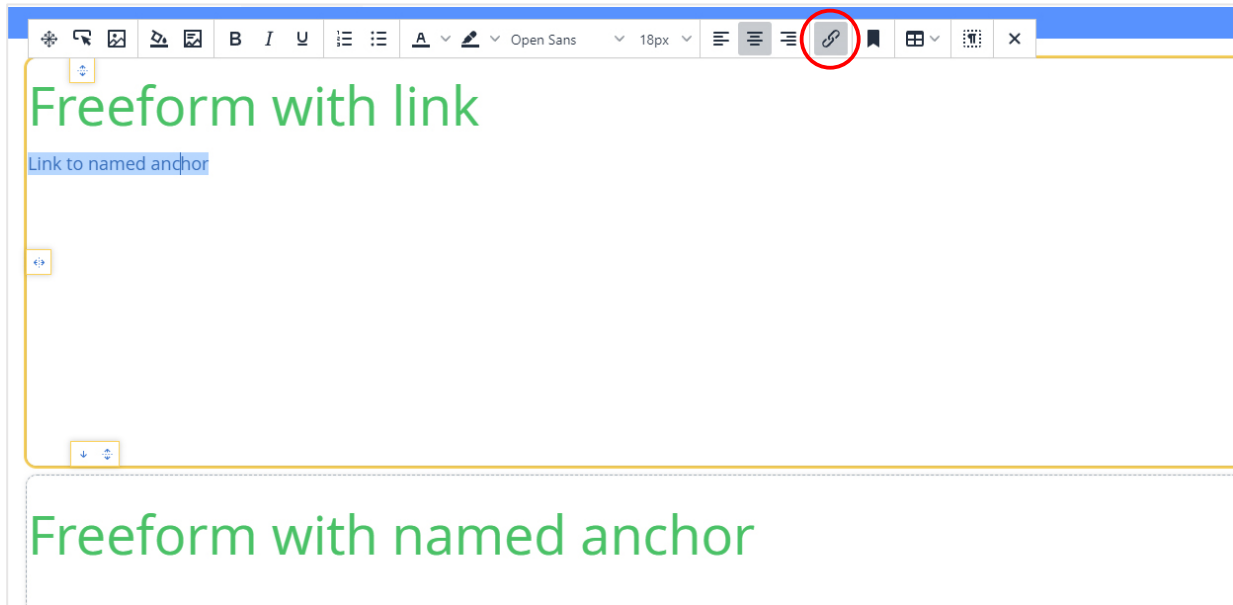
### Affected Patient

|                 |  |   |
|-----------------|--|---|
| NHS Number      | <input type="text" value="999999999"/>                           | <input type="button" value="Search"/>   |
|                 | <input type="text" value="Or search for a patient manually..."/> |   |
| Hospital Number | <input type="text" value="654321"/>                              | <input type="button" value="Search"/>   |
|                 | <input type="text" value="Or search for a patient manually..."/> |   |
| First Name      | <input type="text" value="InPhase"/>                             |   |
| Surname         | <input type="text" value="Consultant"/>                          |   |
| Date Of Birth   | <input type="text" value="09/03/1952"/>                          | <input type="button" value="Calendar"/> |

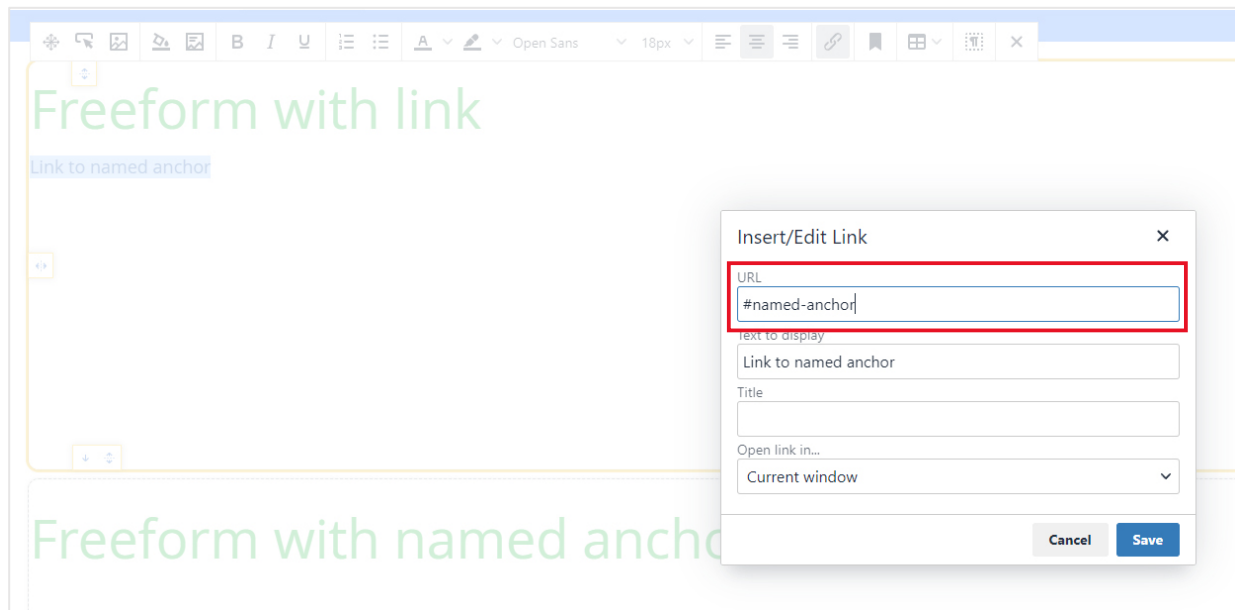
## Named Anchors

You can now create links between different areas of a page in Designer using named anchors in Freeforms. You will need two Freeforms – one with the link, the other with the named anchor (the target).

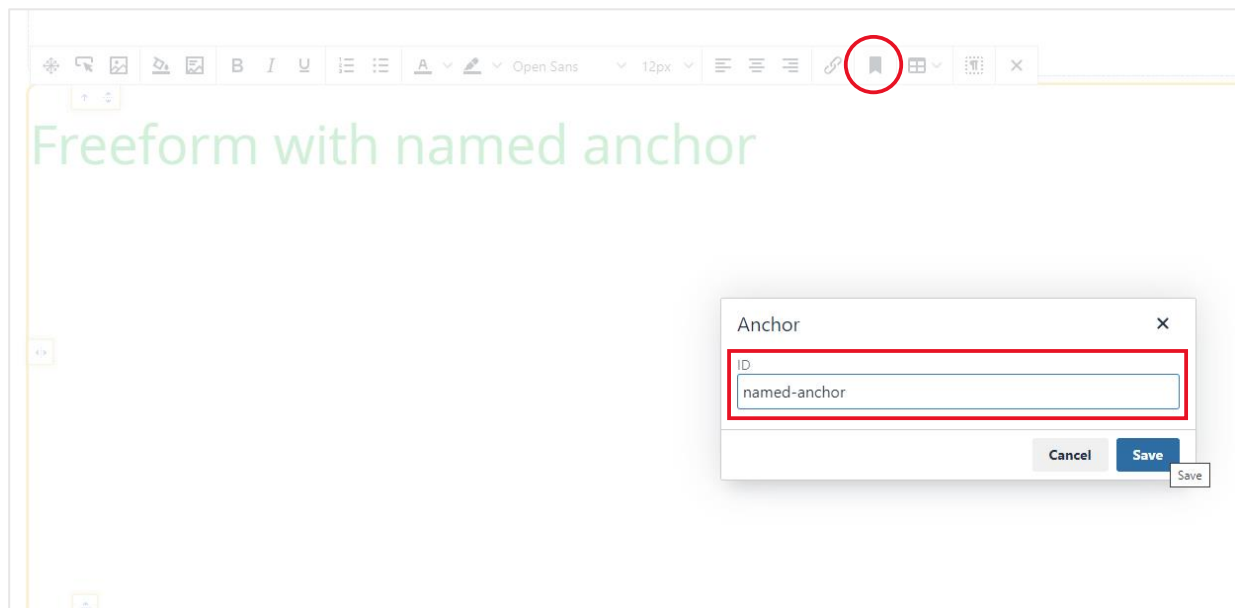
Select some text in the first Freeform, and click on the link icon:



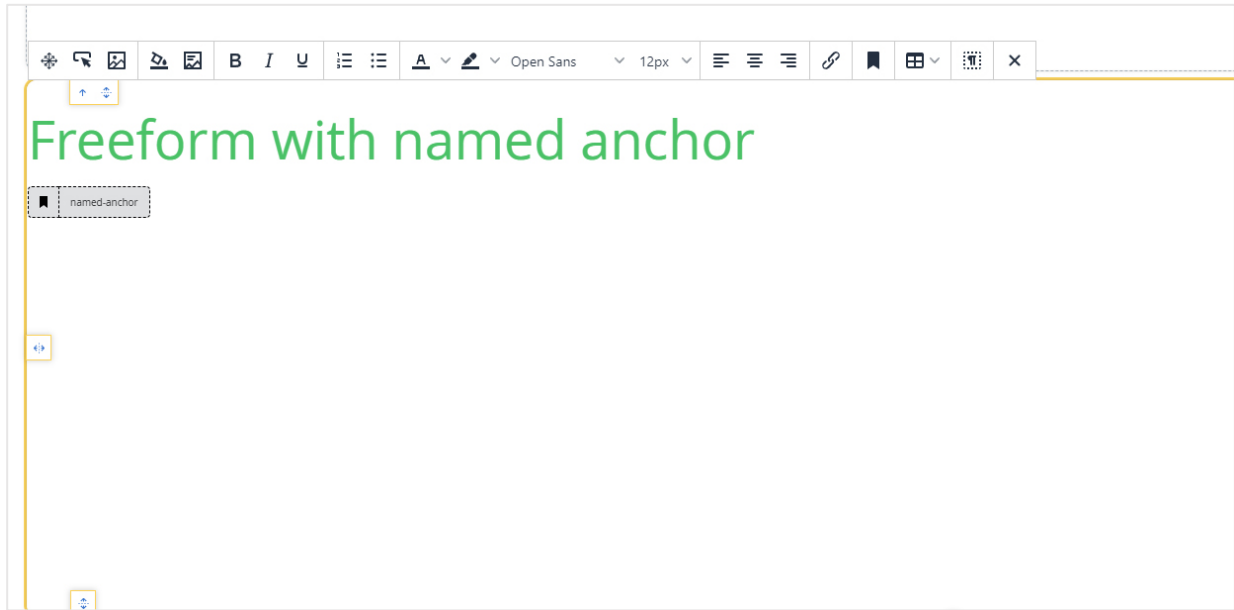
Next, type a hash (#) followed by what you want to call the link in the URL box of the dialog. Copy this text to the clipboard, excluding the hash, and click **Save**.



Next, in another Freeform elsewhere on the page, click the bookmark icon and paste the text you copied earlier into the dialog box and click **Save**:



Your named anchor will now appear. It can be moved by dragging and can be edited by clicking on it and then clicking the bookmark icon.





## Breaking Changes

No breaking changes have been made to InPhase since version 22.0.304 regarding features.

For On Premise customers, InPhase now uses features of SQL only available in 2017 onwards.

## Important Changes

Sites using SSO only, will now see a splash screen with a Login button. The text on the button can include the name e.g. Azure AD, NHS Mail to help end users. This is configured by InPhase.

Incognito Access will in a future release have File Upload and Employee search prevented by default, but there is no forced change in this release. This release does support an InPhase configurable ability to:

- Prevent File attachments when opening in Incognito, but available via SSO or Logged In or the requestor is within a trusted IP range
- Prevent Employee questions when opening in Incognito, but available via SSO or Logged In or the requestor is within a trusted IP range

## Change Log

### Measure Functions

- Limit Actual value to Target – Derived function that limits the Actual value to the Target value (PLAN 1) from its donors.
- Actual as percentage of Target – Derived function that populates the Actual value using the donor's actuals as a percentage of the donor's target.

### Custom Fields

- Check box/Check box list now save an empty selection correctly.

### Comments

- Encoding of special characters improved.

### Freeform

- Named anchors for jump to links within a page.
- Fixed colour picker closing too early when typing colour values.

### Questionnaire

- Email Edit link colour changed to improve visibility.
- If a section has Documents/Links one, it will be shown. Previously with no
- Linked Entities now use their Icon.
- Workflow conditions will check every repeating section, not just the first. Each condition is checked independently, and so matching answers could be from different instances of the repeating section.

### Questionnaire Export

- Options to include on each row:
  - Organisational Unit
  - Object Name/Id
  - Period Date
- Issue with many Questionnaires for export causing an invalid save and losing the settings.

### Questionnaire Reports

- Reports using multiple Questionnaires using Calculated fields that have a data transform applied now show the transformed value in Slicers.

#### Audit Questionnaire Picker

- Nested questions are now available in the drop-down list generated for the selected Audit.

#### Linked Widgets

- Criteria using multiple Group criteria will now replace the Object/Measure in all groups instead of replacing the entire query.

#### UI

- Portal automated grid layout improved for mobile.
- Grid cells with no visualisations get hidden in mobile layout.

#### Performance

- Optimised population of Organisational Units
- Creation of Objects and its relations performance improved.
- Criteria using “Needed Objects” optimised to reduce database calls.
- Task creation time improved
- My Page sunbursts now use the Object start date, not the Measure start date to improve loading times.
- Registering a new Model optimised around case sensitivity, making registering a new model much quicker.

#### Admin - Employee

- Bulk Export now include the special roles for the Questionnaire.

#### Admin – Visualisation

- Visualisations can now be locked to Model Administrators
- Visualisations can now be locked to InPhase, this prevents accidental changes to core visualisations used in delivered apps. Visualisations can be saved as new if customisation is needed.

#### Admin – Question Manager

- Manual email address no longer lost on re-open.
- Used list loading optimised.
- Notification ‘Questions to include’ list now keeps order rather than being automatically sorted, with the ability to drag and drop.

#### Incognito Access – InPhase Configurable

- Prevent File attachments when opening in Incognito, but available via SSO or Logged In or the requestor is within a trusted IP range.

- Prevent Employee questions when opening in Incognito, but available via SSO or Logged In or the requestor is within a trusted IP range.

#### + EMAIL NOTIFICATIONS

|        |   |  |
|--------|---|--|
| Title  | <u>LFPSE Event Reviewer Notificatio</u>   | Questions to include   |
| Header | You have received this event notification because you are the designated event reviewer. The timely review of incidents affecting our patients is a | <div style="border: 1px solid #0070c0; padding: 2px; margin-bottom: 2px;">Describe what happened <span style="float: right;">×</span></div> <div style="border: 1px solid #0070c0; padding: 2px; margin-bottom: 2px;">Event Location <span style="float: right;">×</span></div> <div style="border: 1px solid #0070c0; padding: 2px; margin-bottom: 2px;">Reported Date <span style="float: right;">×</span></div> <div style="border: 1px solid #0070c0; padding: 2px; margin-bottom: 2px;">Type <span style="float: right;">×</span></div> <div style="border: 1px solid #0070c0; padding: 2px; margin-bottom: 2px;">Who is responsible for the event review? <span style="float: right;">×</span></div> |
| Footer |   | <b>Add question</b><br>Email Source <u>Employee(s) in Answers</u> <span style="float: right;">▼</span>   |

- Extra validation to detect rules affected by removing a question.
- Conversion between one Text based question to another now permitted if no data truncation will take place.

#### Permissions

- If a Portal has permissions, users with Performance Modeller no longer have access by default.

#### Data Sources

- Calculated fields using “Compare numbers (row)” will now open correctly.

#### Email

- Infrastructure Option to relay via Azure. Contact InPhase regarding set up.

#### Login

- If SSO only, still get a splash screen with a login button.

## Previous Service Update

22.0.304

- Email on Comment creation/reply  
To prevent possible leak of PII data or commercially sensitive data via email, the content of a Comment or Reply can be configured to replace the content of the Comment/Reply with “Redacted”. This can be configured via the Model Settings in Administrator.
- SSO
  - Integration with NHS Mail SSO. This is available by request.
  - Integration with Okta. This is available by request.
- Questionnaire – Instance
  - Fixed issue with validation of time “not later than” for Today.
  - Fixed issue with the removal of employee(s) from multi-employee picker.
  - Fixed issue with cascading choice in a specific scenario not updating the second drop-down.
- Questionnaire – Audits
  - Resolved an issue with Multi-choice Compliance questions using “N/A” preventing save.
- Questionnaire – Template Editing
  - Improved auditing of changes to Sections, Questions and Stages.
  - “When to Show” validated on save to ensure rules are configured correctly.
- Questionnaire – Object Sync
  - If the end date is set to before the start date due to the Object Sync, the start date is moved instead of rejecting all Object updates.
- Questionnaire – Workflow
  - “Manager of Employee in Question” is now available.
  - Risk question values are now available to use in rule conditions.
- Questionnaire – Stop the Clock
  - Stop the clock functionality now allows the start/stop date to be manually selected, rather than forced to the current date.
- Questionnaire – Accessibility
  - Employee picker labels.
  - Employee search format of job tile/org unit improved.
  - Help text font size increased.
  - Choice/multi-choice labels.
  - Type-ahead/Search now puts exact matches first.
- Question Manager
  - Validation on question conditions now detects if the source question has been deleted.

- Questionnaire – Import
  - Handles both CSV and Excel data.
- Questionnaire – Export
  - Built-in fields removed from columns and added as rows.
  - New columns for Repeating Section Id and Repeating Question Id to allow the export of repeating data.
  - Export file split into new file(s) after 50,000 rows of data written.
  - New options for export:
    - Specific date range.
    - Zip export files.
    - Exclude metadata.
    - Exclude blanks.
    - Exclude Long Text.
    - Export Repeating.
- Comments
  - Multi-file attach is now working for multiple local file uploads.
  - Creation of Comments via a Questionnaire now sends email notifications
  - Email notifications can be changed to redact comment text in case sensitive data is recorded. This setting can be changed in Administrator under Model Settings
- Scorecards
  - Enterprise comment bullet points are now consistent with Designer
- Trends
  - Input to custom fields without a current value now supported. Issue introduced in 22.0.303.
  - Export to Excel now forced to use dates as displayed as in some scenarios American date format was used.
  - Live Data sources using “Numeric Id” as data type now support “Exact Value” slicers.
- Notebook
  - Tasks linked to a specific measure can now be unlinked from the Object Notebook.
- Live Connect
  - Report view data can be passed into an SQL Repository for custom queries using \$ViewDate\$
- Accessibility
  - New Portal page improved.
  - Open Sans font at 12px rendering improved.
  - UI inconsistencies in Safari and Firefox fixed for date pickers.
  - Attachment dropping improved in Safari.
- Admin

- Improved auditing of changes to Model settings.
- Importing users with surnames including spaces is now handled, provided the first part is longer than 3 characters. If the first part is 3 characters or less, it is treated as their Initial.
- Job steps can now be removed.
- Password setting for max days is now set correctly.
- Custom Fields form editor
  - drag and drop for sections improved.
  - standard InPhase fields now appear in the fields list.
  - fields list is now filterable.
- New Model Setting for “Self Service Profile”. This allows administrators to prevent users from updating their profile (name, email etc). The user can still update their preference via the profile pop-up.
- Login
  - Password expiry is now checked on all pages loaded.
- Performance improvements
  - Creating a new Object.
  - Caching of Employees, Department, and Custom Object form templates.
  - Optimisation of report Object/Measure/Task criteria.
  - Optimisation of “Needed” object relation criteria.
- Email
  - Improved Subject sanitisation to prevent rejection based on subject.
  - Notification on Task assigned to “you” by another user. Previously this was only on Task creation. Controlled by the same “On Task creation” setting in profile.
- Misc
  - Ability to set a model or entire site to “Training”. This will only alter the header to indicate a training model.



### 22.0.303

- Questionnaire Reporting
  - Performance improvements on Date Time field searching.
  - Improved handling of Calculated Fields in Live Connect.
- Causal Map
  - Drill down to Objectives with custom Object Code now supported.
- Dimensions
  - The following Parent/Ancessor properties are now available to add to a report:
    - Owner
    - Owner's Department
    - Description
    - Start
    - Due
    - End
    - Priority
    - Stage
    - Org Unit