InPhase I21

InPhase Administrator

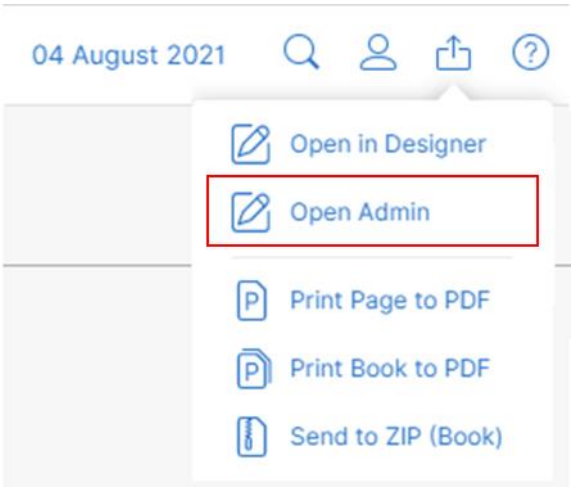
User Guide

Contents

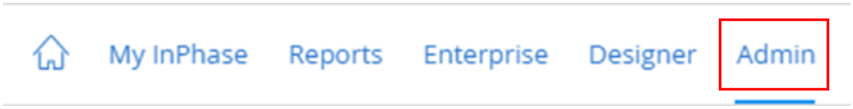
Accessing InPhase Administrator Application

Users with a Model Administrator licence can access the InPhase Administrator Webapp, from either the current Enterprise or Designer session.

From InPhase Enterprise



From InPhase Designer



Within an InPhase installation there can be a number of models. These are displayed in the model dropdown list. There can be different configuration settings set up in different InPhase models.

The model initially displayed will be the model you were in before you opened the InPhase Administrator Application.

Navigation

Navigator Panel

The navigator panel lists out the options that can be configured. The navigator panels display the current model that you are configuring. If you wish to configure a different model, click on the model name drop down list.

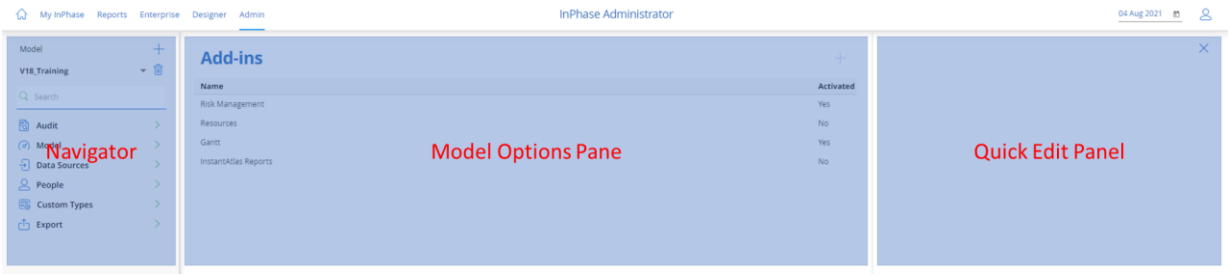
Deleting the model will unregister the model from InPhase Administrator and will no longer be accessible by any user are configurable in the InPhase Administrator application until it is re-registered.

Model Options Pane

This the main area of the screen where all the details for each configurable option is displayed.

Quick Edit Panel

This the area on the right side of the screen allows editing of configurable option.



Adding / Registering The First Model Database

If you are using an application on a server hosted by InPhase the actions described in this section will already have been carried out on your behalf.

Before registering a model database it must be set up as per minimum product specifications and appropriate permissions must be granted. See the installation instructions for guidance on how this should be done. In order to register a new model database you need to know:

- The name of the server and SQL Server instance on which the model database is located
- The name of the model database

To register the first model:

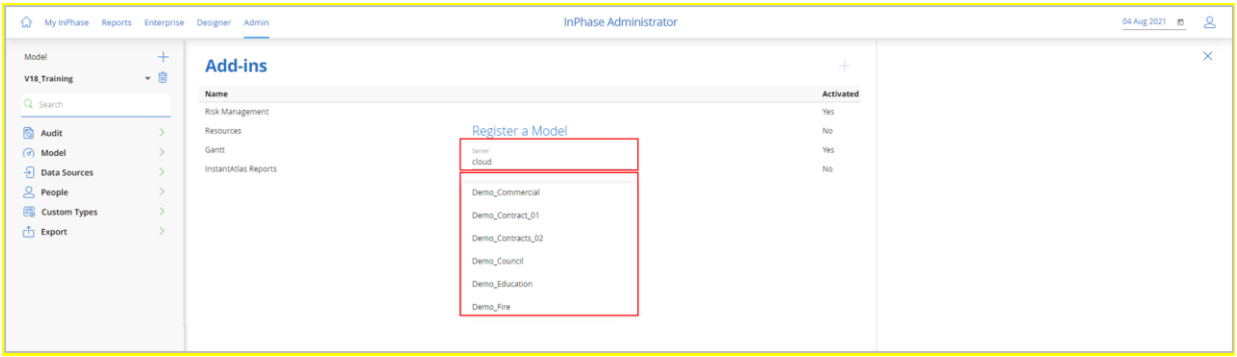
Login to InPhase using the Default User username. Please contact support@inphase.com for these details .

Click + In the navigator pane.

Enter the name of the server and SQL Server instance on which the model database is located and the name of the model database that you wish to register from the list of databases. This list includes all databases on the server - some of which are not InPhase model databases. Take care to select the correct database from the list. If the SQL Server is installed as a named instance, then the server name that you enter should be formatted as:

- ServerName\InstanceName
  Always specify an actual server name - DO NOT use names such as local server.

Select the name of the model database that you wish to register from the list of databases. This list includes all databases on the server - some of which are not InPhase model databases. Take care to select the correct database from the list.



The database named “model” is not an InPhase model database - it is a SQL Server system database. If the model database has been used in an environment where Windows Integrated Authentication has been used, then the model that you are about to register may include information about the Windows domain and username that was defined for each of the employees.

If you want to retain this information when the model database is registered, then ensure that the Retain Windows Domain \ Username details for newly created users check box is checked. If you do not use Windows Integrated Authentication, then you should normally uncheck this box.

If the checkbox is selected:

- As the model database is registered each employee in the new database is checked to see if it already exists as an InPhase Application user login – this will only be the case if they exist in a database that has already been registered with InPhase Administrator
- If the employee already exists as a user login, then the details of the users Windows domain and usernames are copied to the employee record in the database that is being registered
- If the employee does not already exist as an InPhase Application user login then an InPhase Application user login is created for them. The Windows domain and username details from the newly registered model are then copied to the new user login. However, if any other InPhase Application user login is already associated with the same Windows domain and Username and the new employee this attempt will fail and the model registration process will be abandoned.

If the checkbox is not selected:

- As the model database is registered each employee in the new database is checked to see if it already exists as an InPhase Application user login – this will only be the case if they exist in a database that has already been registered with InPhase Administrator
- If the employee already exists as a user, then the details of the users Windows domain and usernames are copied to the employee record in the database that is being registered
- If the employee does not already exist as an InPhase Application user then an InPhase Application user login is created for them. The Windows domain and user name details from the newly registered model are NOT copied to the new user login. This means that the newly created user login will not be associated with any Windows user or domain. They will not be able to log on using integrated Windows authentication until they are mapped on to a Windows domain and username.

Click on OK to register the model or Cancel to close the dialogue without registering the model.

When the model is registered, InPhase Administrator imports the user (employee) names, passwords, and permissions from the model database into the User and Model Administration database. Check with the person that set up the model database to get details of the users, passwords, and permissions.

Log out of InPhase Administrator. The Default User exists only to enable you to complete the registration of the first model databases. You should not carry out other administration tasks whilst logged in as this user.

Adding Additional Models

If you are using an InPhase Application on a server hosted by InPhase please contact support@inphase.com if you need to have access to additional model databases.

You can register additional models by starting up InPhase Administrator and logging in as a user who is a member of the Model Administrator role, then follow the steps described earlier in the section Adding / Registering The First Model Database. This user must also be a member of the Model Administrator role in the database that is to be registered.

Initially, the users that are members of the Model Administrator role are those that were imported from previously registered models. Check with the person that set up these models for details of the appropriate usernames and passwords.

When new models are registered, employees from the new model are imported into the User and Model Administration. If a username in a new model are identical to an already registered user then the existing registered user name and password are maintained in the User and Model Administration database. The password of the matching employee in the newly registered database is updated to match the value that is already recorded in the InPhase User and Model Administration database.

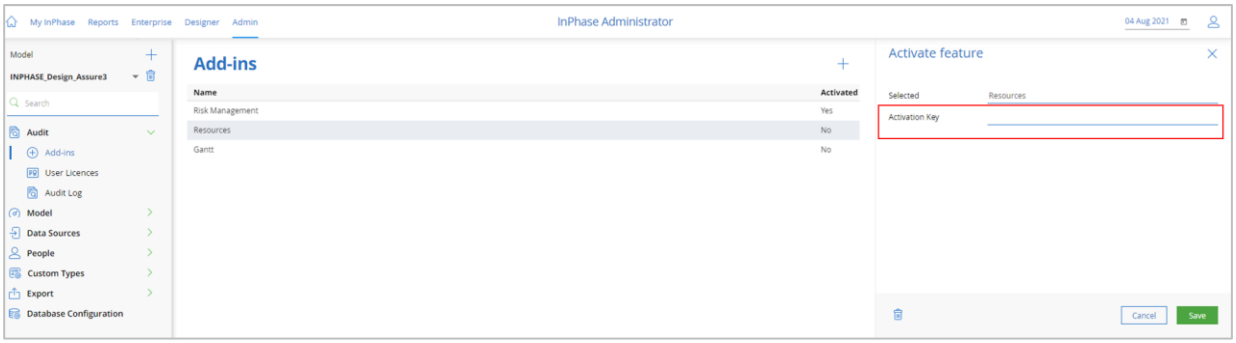
Audit

Add-ins

InPhase add-ins are available for

- Risk Management
- Resources
- Gantt

When an add-in is procured from InPhase, you will be provided with an Activation Key. Select the add-in to open the quick edit panel. Simply enter your activation key and click save.



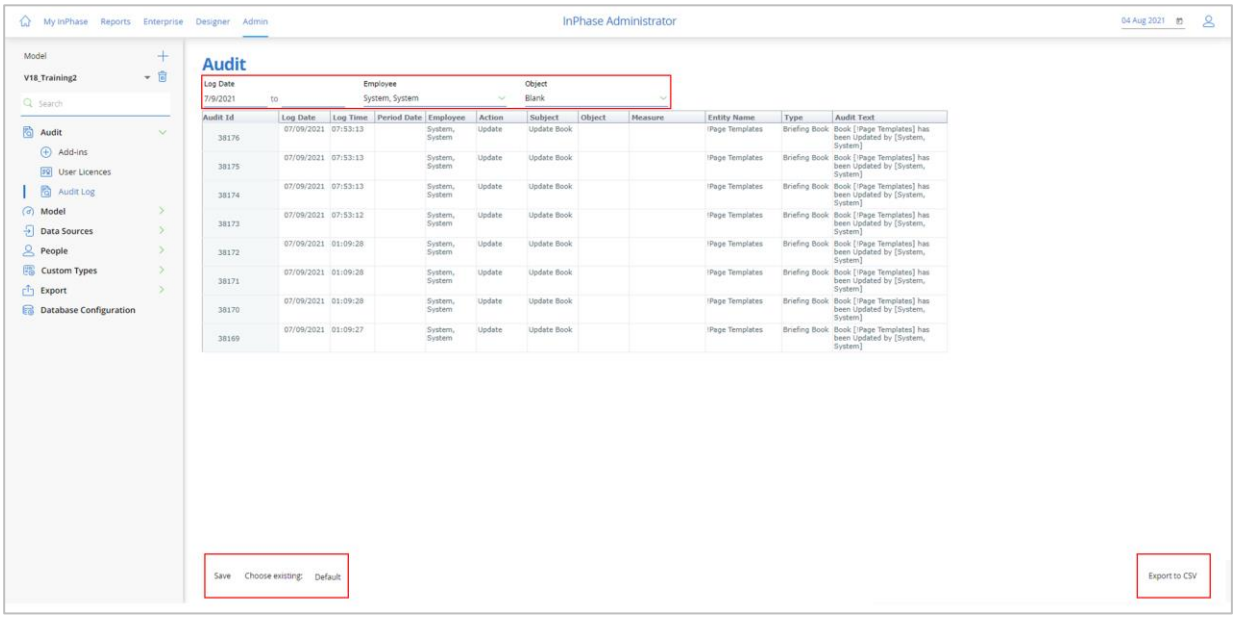
User Licences

Against each model you can check the User Licenses section to see how many users you have set up against each of the standard roles. Selecting a standard role will open the quick edit panel and display the users who have the licence type.

Standard Role (licences) can be managed here by editing the roles and adding or removing users from a particular standard role. See standard roles and licences for further information

Audit Log

The audit log provides a trends table showing, by default, today's activity. The slicers can be amended to show a particular date range, user or object. Additional slicers and/or fields can be added by opening the dimension panel (right click on the table) and dragging them into the slicer section or table



Filters of the audit log can be saved and reopened, as well as exported to CSV.

Model

Model Settings

Active Filter

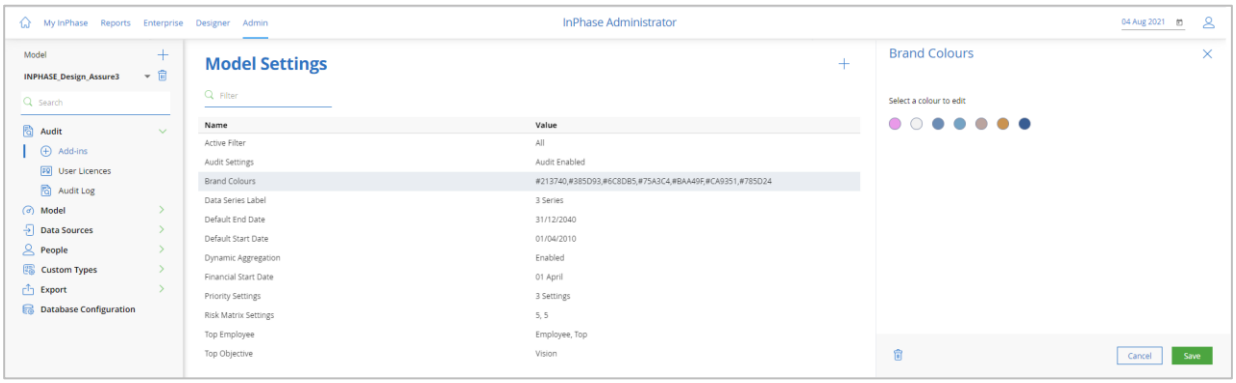
This defines the default active date filter setting for the database. This setting is used when users do not define a setting of their own.

Audit Settings

Ability to turn off / on audit logged activity. By default, audit activity is enabled.

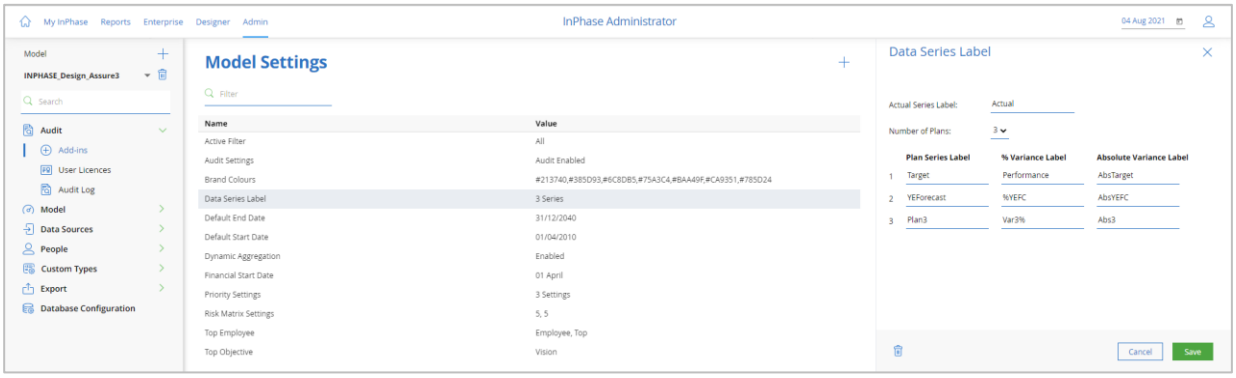
Brand Colours

Allows the brand colour palate can be updated with up to 7 different colours / colour tones. This can assist easy application of consistent customer branding for portals and visualisations created in InPhase Designer. Simply select a colour to update in the quick edit panel. An alternative colour from other existing palettes scan be used or setting a specific tone, HEX or RBG code through the advanced settings.



Data Series Label

InPhase can display calculated and manually entered actual values, and up to nine plan lines (with percentage and absolute variance) for each Object Measure pair. Every Object measure in the Model database will include all of the configured Actual and Plan series. To update or add the data series labels, simply update these in the quick edit panel.



Default End Date

The default end date defines the date up to which plan values will be aggregated. For objects that continue (i.e. do not have an end date), it also defines the date up to which planning slots for measures and competencies will be displayed. The default end date must be managed using InPhase Administrator because it defines the date up to which one can enter plans for objects without a defined end date, it will need to be reset each year ready for the next set of plans to be entered. It is good practice to set a default end date at least 24 months ahead.

Default Start Date

The default start date defines the default start date for the model.

Dynamic Aggregation

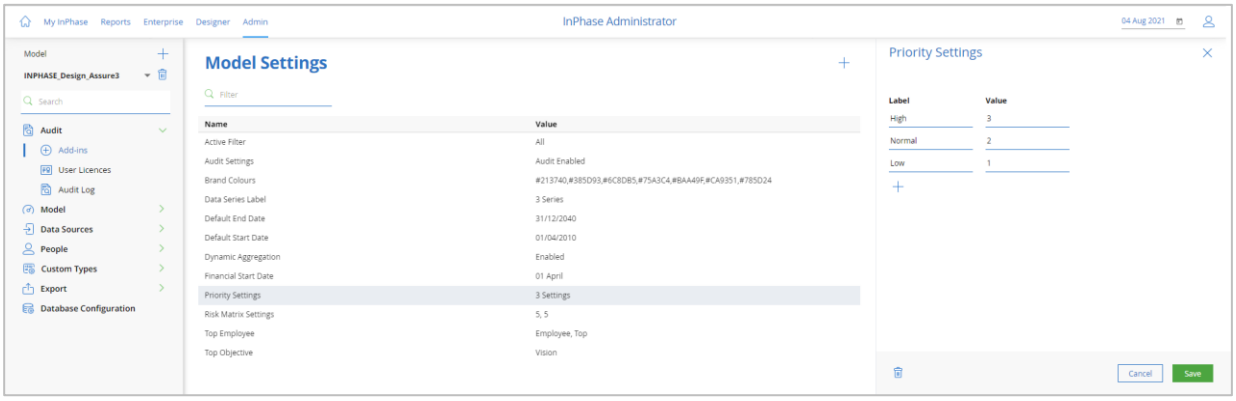
These settings control the way in which Dynamic Aggregation works. Dynamic aggregation is a process by which data value changes are automatically aggregated from the point of entry to other object measures that are affected by the change.

Financial Start Date

The financial year start defines the day/month start date for the organisation's financial year. This is the date from which measure values will be accumulated in 'To Date' views of the data. InPhase manages the allocation of financial year start dates for years other than the current financial year dynamically: if you are viewing data from an earlier year, or creating plans for a future period, the financial year start date will automatically be set to the correct date for that year (e.g. 1 April 2020 when the view date is set to January 2021, or 1 April 2021 when the view date is set to August 2021).

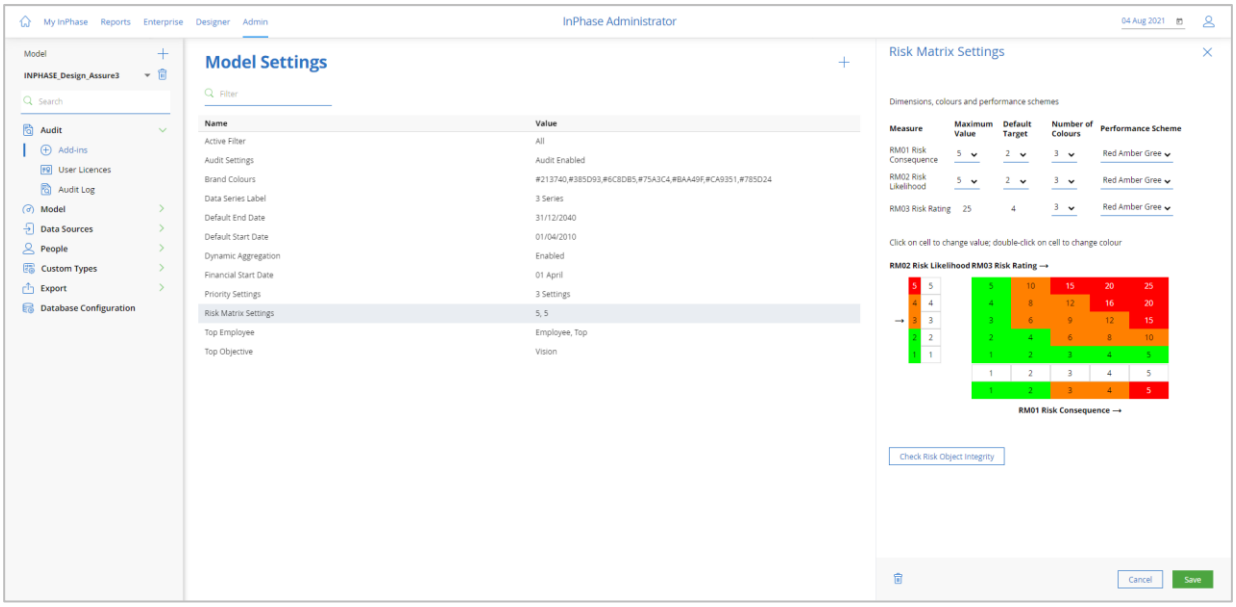
Priority Setting

These define the priority settings that can be associated with Objects and Tasks that are used in the Model database. To update or add the priority settings, Simply update these in the quick edit panel.



Risk Matrix Settings

These settings control the way in which the Risk Management add-in works. The settings are not available in model databases that do not use the Risk Management add-in.



Top Employee

Not the highest performing employee, but the name at the top of the organisational reporting hierarchy! This is usually the Chief Executive or equivalent.

Top Objective

The Top Objective in the model defines the top of the object hierarchy. However, it is often more appropriate to make it a generic ‘Achieve organisational goals’ object, that can be the parent of all other organisational objects.

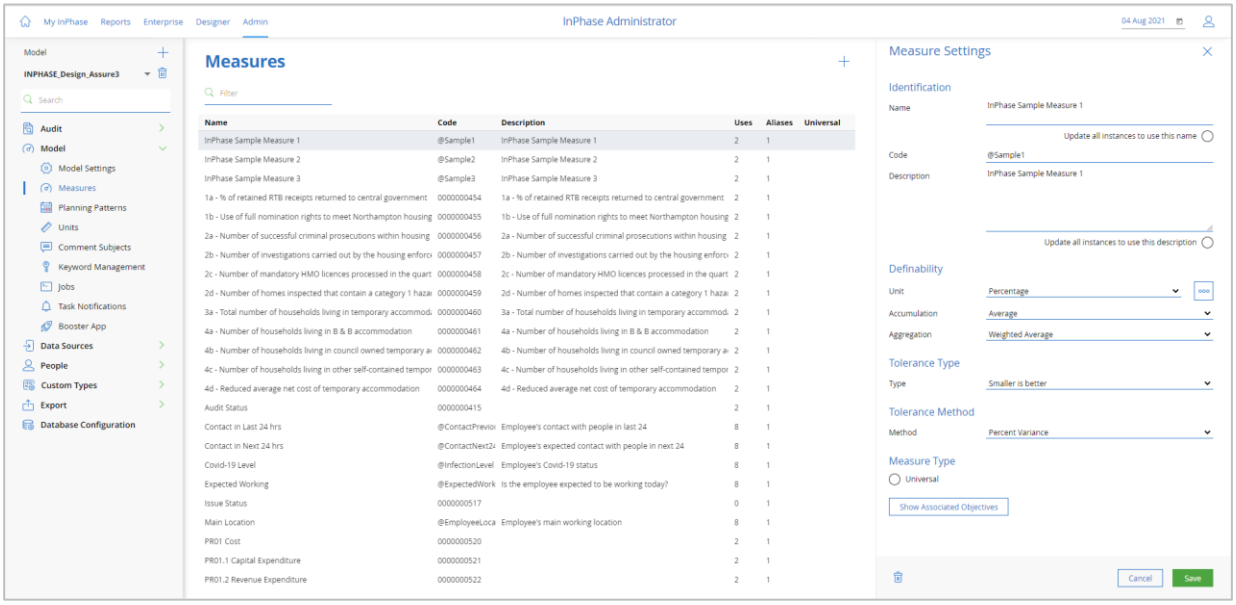
Measures

The Measures menu will list all the measures that exist within the model, and shows information such as the measure name, code, description, uses, aliases and whether the measure is universal.

Uses - Indicates the number of objects a measure is associated against. By clicking on the measure to open the quick edit panel, the 'show associated objectives' (under measure type) will display the name of object the measure is associated against. As the status measure is automatically added to each object, the number of uses of the status measure indicates the number of objectives in the system.

Aliases - When a Measure is added to an Object, it can be assigned an alias. The alias represents the name that is used to identify the measure in that specific object. The same measure can be given different aliases when added to different objects if you wish. This column counts how many different aliases are in use across InPhase for a measure.

Universal - Denotes whether the measure is a universal measure or a non-universal measure.



Measure Settings

Most of the settings for measures can be varied for each object, such as performance scheme, tolerance values. The exceptions to this are the measure name and the unit; these must be consistent in all objects. Editing these properties will apply to all instances of the measure. The default tolerance type, tolerance method and accumulation/aggregation method can also be amended, and this will apply to all uses of the measure in objects from this point onwards.

Measure Name - To change the measure name simply select the measure to open the quick edit panel and name the measure name. A measure name cannot exceed 100 characters including specials and

spaces. If you change the measure name, then the name is updated in all objects that reference the measure by its old name.

The old measure name will be deleted from the system when you save your changes. Objects that reference the measure using a different alias are not affected and will continue to reference the measure by the same alias that they used before. However, 'update all instances of the measure to use this name' will remove any aliases in use for that measure.

Measure code (optional - a default value will automatically be assigned if you do not specify a value when creating a new measure). Measures with codes that begin with a # symbol have a special meaning within InPhase Applications. You cannot update codes that begin with a # symbol nor can you create or change a measure code in such a way that the code begins with a # symbol.

Description - This represents the default description that will be used whenever the measure is added to an object using the Web application.

Unit – Sets the unit for the measure. Click the ellipsis button (…) to the right of the **Units** drop down if you want to define a new unit. See text based units for further information

Accumulation – Default Accumulation Method for the measure when added to objects

Aggregation – Default Aggregation Method for the measure when added to objects

Tolerance Type – Default Tolerance Type (bigger is Better, Smaller is Better, Plan is Best) for the measure when added to objects

Tolerance Method - Default Tolerance Method (% variance from target, absolute variance from target, absolute value) for the measure when added to objects

Measure Type (Universal) - When a measure is set up as a universal measure, InPhase maintains only a single set of values for the measure. These same values are used in every Object to which the measure is added.

The main characteristics of a universal measure are:

- Only a single set of measure values exist regardless of the number of the objects that the measure has been added to
- Updating any Object Measure value for the measure will result in its value being changed for all other objects that the measure is used in - this is true even if the different objects are not linked in any way by part-whole or derived function relationships
- The same planning pattern, calculated series source, derived formula, accumulation method, tolerance type, benchmark series and workflow related information are used wherever the measure is used in an object. If you edit any of these properties for one of the measures Object Measures it will be updated for all others.
- The universal measure can be given different alias names when used in different objects.

- If a universal measure includes benchmark series, tolerance settings can be defined for each of the benchmark series. You can define different tolerance settings for these benchmark series for each usage of the universal measure in an object
- When updating a universal measure for a specific object, a user must have permissions to update that specific object measure. When the user saves the changes the application will update all instances of the measure in all objects, regardless of whether the user has permission to update these other object measures.

Universal measures are useful when you need to include identical information in several objects without the need to link the objects using part whole relationships or derived formulae and without any kind of aggregation being necessary.

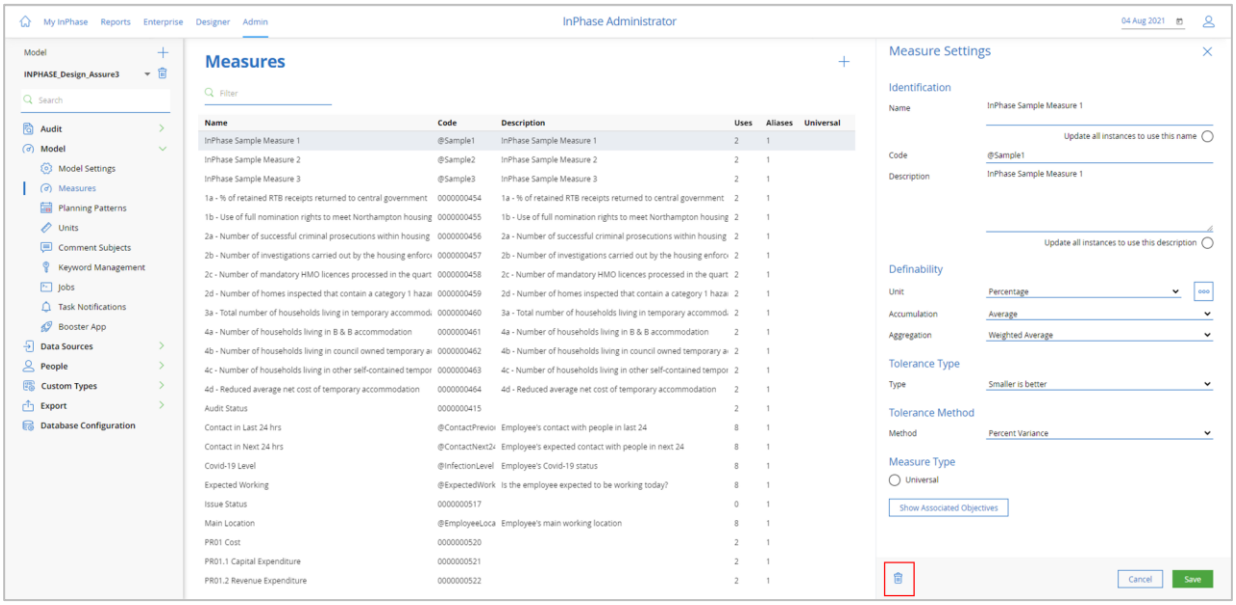
If you edit an existing measure and change it from being universal to non-universal (regular) then separate measure values are created for the measure in all objects that the measure is used. These values can be processed independently, and the restrictions described above for universal measures no longer apply.

If you edit an existing non-universal measure to make it into a universal measure then if the measure is already being used by several objects, a list of all of these is displayed. You are then prompted to select one of the object measures that should be used as a data source for the universal measure. All instances of the measure are then updated so that they use the same measure values, planning pattern etc as the selected Object Measure. The restrictions associated with universal measures then apply to all uses of the measure within all objects.

Deleting a Measure

To delete a measure from an InPhase Model, simply click on the 'bin' icon. If a measure remains associated to an object, InPhase will display those objects and require confirmation that you wish to delete the measure. Deleting measures will all data stored against all instances of the measure.

IMPORTANT: This action cannot be undone, without restoring your InPhase Model.



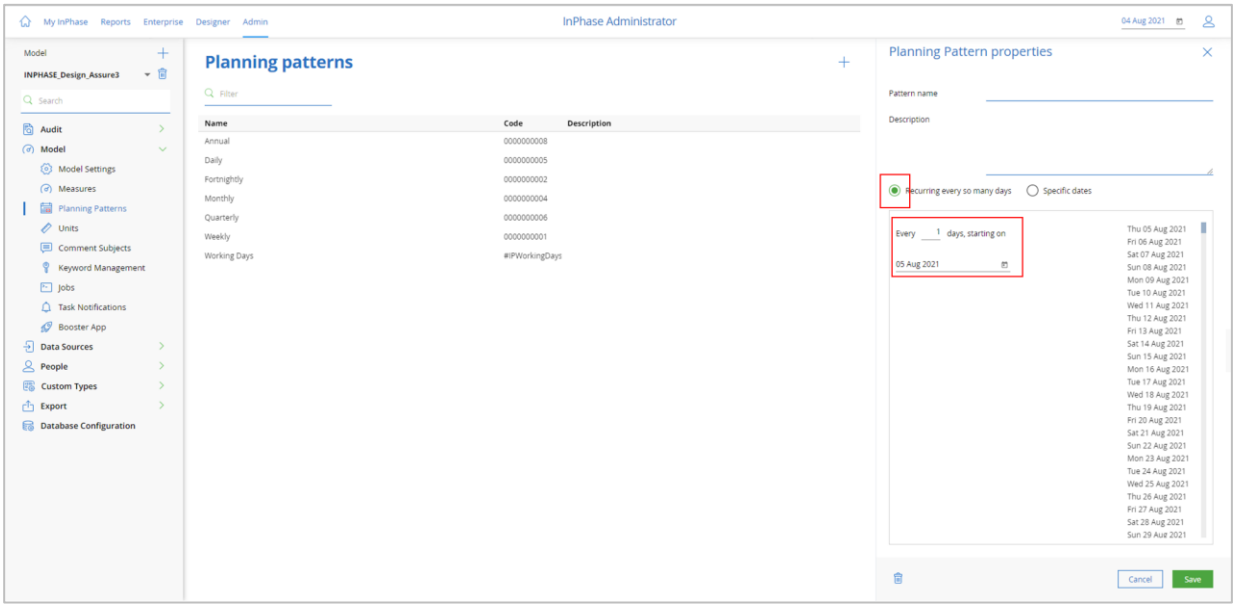
Planning Patterns

Planning Patterns are set against Object Measures which allow data to be entered at the frequency (and dates) in which data is collected. There are some default planning patterns, e.g. monthly or quarterly. You can specify a default planning pattern that should be used when users add measures to objects in InPhase.

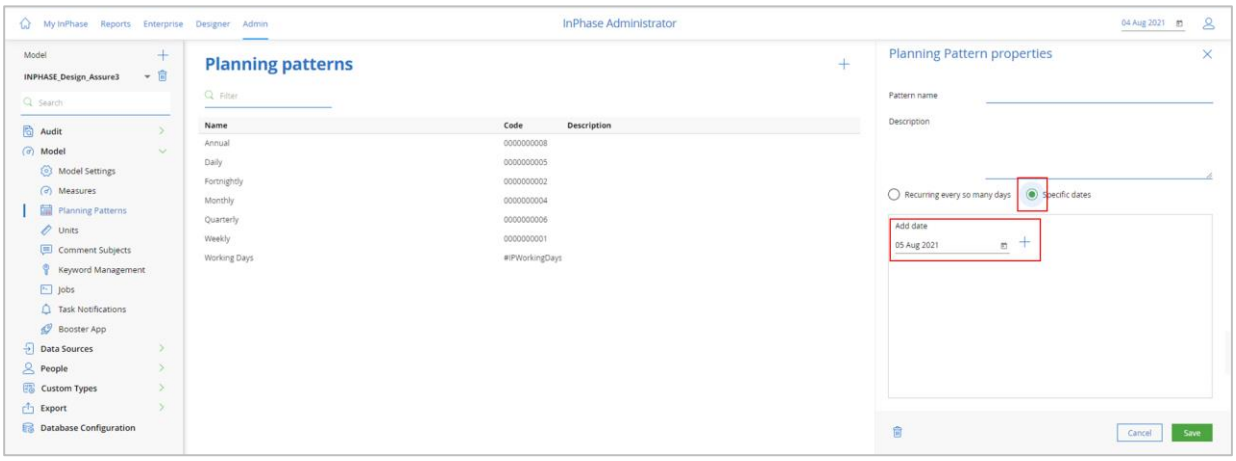
Managing planning pattern

Click on the + to create a new planning pattern and the quick edit panel becomes available. Determine a name for the new planning pattern and optionally, a description.

If the planning patterns dates can be determined based on recurring pattern (i.e. every x days), select ‘recurring every so many days’ and select the number of days between each date along with the first reporting date.



If the planning patterns dates cannot be determined based on recurring pattern (i.e. non-periodic), select 'specific dates' and select specific dates needed in the planning pattern.



Note: Planning patterns cannot be deleted if they are in use by an Object/Measure pair.

Units

Every measure has a unit to indicate if it's a number, percentage, etc

Adding Units

- Click + to create / add a new unit
- Enter a name of Score Rating and an appropriate description in the quick edit panel
- Click Save to save the new unit

Deleting Units

You can delete a Unit by selecting its name in the left pane and clicking the bin icon in the quick edit panel. You cannot delete a unit that is currently associated with any measure.

Text Based Units

Text based units are units that have values that are 'textual' rather than 'numeric'. Internally, text based units are always represented as numbers, but their values are displayed and set in as pieces of text rather than as numbers. This allows you, for example, to set up measures that have values that are set and displayed as 'Good', 'OK' and 'Bad' rather than as 3, 2 and 1. The values 'text' of text based units and their corresponding numeric values are defined and maintained in InPhase Administrator.

For a measure to use text based measure values it should be associated with units that are defined as text based measures. Doing this will ensure that the measure values are displayed as their text equivalent within InPhase and that users can enter values in the Trends widget by selecting the appropriate text value from a drop down list of the options available for the measures units.

When a user selects a text based value, Internally the application actually stores the corresponding numeric value. These numeric values are used during the aggregation process and in calculating variances and status measure values etc.

If you use the Risk Management add-in then some text based measure units are automatically created when you define or edit Risk Matrix settings, You can view these units and change the name and/or description of the units. You cannot, however, edit the unit value details directly - they are updated automatically when you change the Risk Matrix settings.

Creating for Use in Text Based Measures

For example, suppose we want to set up a new unit called Score Rating that uses the following text descriptions:

- Excellent to represent a value of 1
- Good to represent the value 2
- Average to represent the value 3
- Poor to represent the value 4

To do this proceed as follows:

- Click + to create / add a new unit
- Enter a name of Score Rating and an appropriate description in the quick edit panel
    - *Click … (more) to add (or edit) the associated text values with the unit*

- Click the **+** button. In the popup enter a value of **1** and label of **Excellent** then **+**
- Click the **+** button. In the popup enter a value of **2** and label of **Good** then **+**
- Click the **+** button. In the popup enter a value of **3** and label of **Average** then **+**
- Click the **+** button. In the popup enter a value of **4** and label of Poor then **+**

- Click Save to save the new unit

Notice that each time you add a value and label, InPhase Administrator adds a meaning to the value. The meaning helps you work out what text value would be displayed for the units if the numeric value did not exactly match one of the values for the unit. In the above example, the unit definition looks like this:

- **1** meaning **< 2**, label **Excellent**
- **2** meaning **>= 2 & < 3**, label **Good**
- **3** meaning **>= 3 & < 4**, label **Average**
- **4** meaning **>= 4 & < 3**, label **Poor**

The above means, for example, that the numeric value 4.8 is represented as Poor, a value of 0 is Excellent, a value of 3.8 is Average etc.

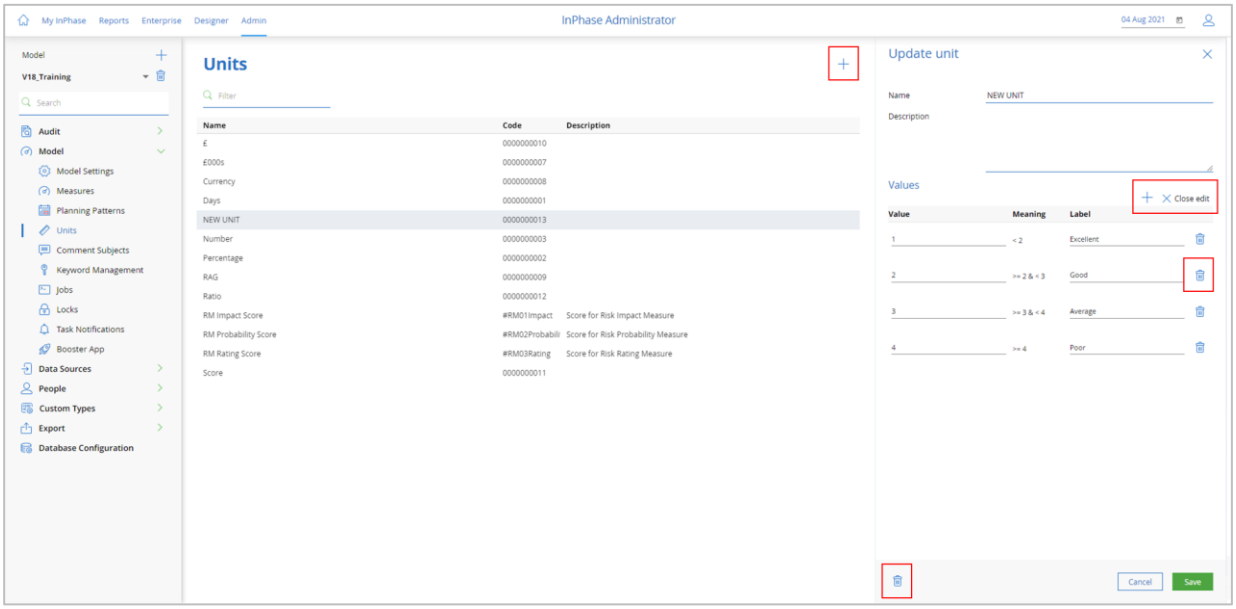
Editing Units for Use in Text Based Measures
To change the text values associated with units that are already defined:

- Click the name of the unit you want to edit / update
- Click the edit icon in the quick edit panel

  - To add new values and labels click the + button
  - To delete a value and/or its label, select it in the list and click the bin icon.
  - To change a value and/or its associated label, simply change the value or label

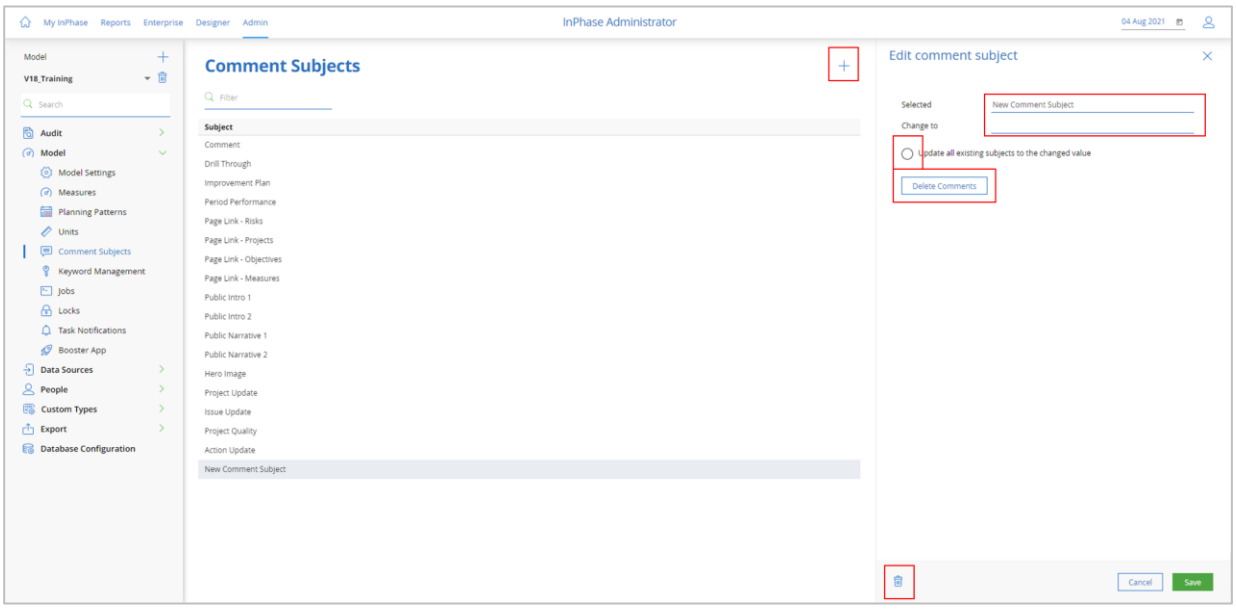
- Click Save to save the new unit

When you change, add or delete unit values you will notice that the value displayed in the **meaning** column is updated so that the values and their meanings remain consistent.



Comment Subjects

When entering comments, the user can select a comments subject. New subjects can be created using the “Comments Subjects” menu item.



When new subjects are created, only the text for the subject is needed. When a subject is changed, the user has the option to update all existing subjects or leave them as is. If a comments subject is deleted, further options are given regarding how to treat existing comments under that subject heading.

This means it is possible to delete all comments relating to a particular subject without deleting the comments subject or prevent the use of the subject in future but leave existing comments in place.

Keyword Management

????

Jobs

A Job comprises of one or more distinct steps that should be processed in order. Each step defines the action to take and enables particular parameters relevant to the step to be defined. Any number of jobs can be created. Each step must perform one of the following actions:

- Aggregation - Aggregate the specified objects for the specified date range
- Direct Data Import - Import data from associated data files
- Notification - Process and send email notifications.

When you define a step for a job there are options that allow you to control which days of the week or month the step will run on. This provides the ability, for example, to schedule a job so that it automatically runs daily but ensure that some of the jobs steps run on some days but not on others.

Jobs Panel

The Jobs panel enables users to view all of the current jobs defined within the model and their current state (running, stopped, %complete etc). The panel also enables job maintenance (creation, updating, and deletion). The details of the column information are as follows:

- Name - The name of the job
- Description - Descriptive text detailing the purpose of the job
- Status Type – The status of the job (stopped, starting, running, stopping). A coloured indicator is also displayed (red - stopped, yellow - starting/stopping, green - running).
- Enabled - Identifies if the job is currently enabled or disabled. If a job is disabled it cannot be run. This feature is particularly useful if you have a job that is scheduled to run a number of times and you need to temporarily ensure that the job will not run.
- Category - A user-defined entry, enabling “grouping” of a set of jobs under a common term.
- %Complete (step) - If the job is currently running, this column will display the %Complete for the step currently being processed.

Note: if you have jobs running, you can press F5 or refresh the browser session to refresh the current progress of the jobs.

Creating a Job

To create a new job, click on the **+**. Enter the name of the job (and optionally, category and description) in the quick edit panel and then add the steps the job will perform (detailed below).

Note: For optimal results it is best to leave the logging level as 'not set'. This reduces the overhead of logging details of the job while it is running. With logging turned off, you will still receive log entries in the application log on the application (web) server in the unlikely event of a failure while running the job.

Defining the Job Steps

To create a new job step, click the Steps **+** button in the quick edit panel. The Create Step dialog will now be displayed. Select the action the step will perform from the "Step Type" drop down box.

Creating an Aggregation Step:

- Select a step type
- Enter the name for the step.
- Choose the Object or Object measure pair combination to start the aggregation from.
- Choose the range of periods that should be aggregated by selecting an appropriate date range.
- Choose the verbosity of entries in the log file:

    - None - will give optimal performance
    - Process Level - will log entries for when the aggregation step started/completed
    - Objective Level - will log entries for each individual object that is aggregated.
    - Measure Level - will log entries for each measure that is aggregated.

- Set **Execute** options if you wish to restrict the days of the week or month that the step should execute. See the help topic Restricting Job Step Execution to Certain Days of the Week or Month for additional details on this
- When you are satisfied, click Save (or cancel to return without creating the step).

Creating a Notification Step:

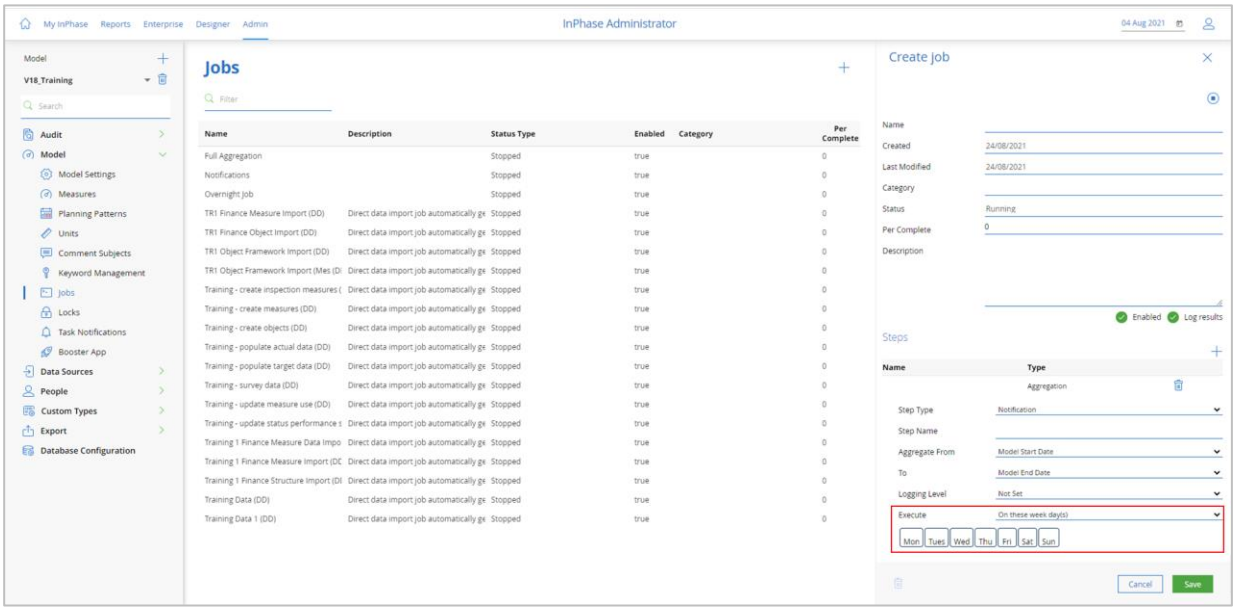
- Select a step type
- Enter the name for the step.
- Choose the date to run notifications against.
- Choose the verbosity of entries in the log file:

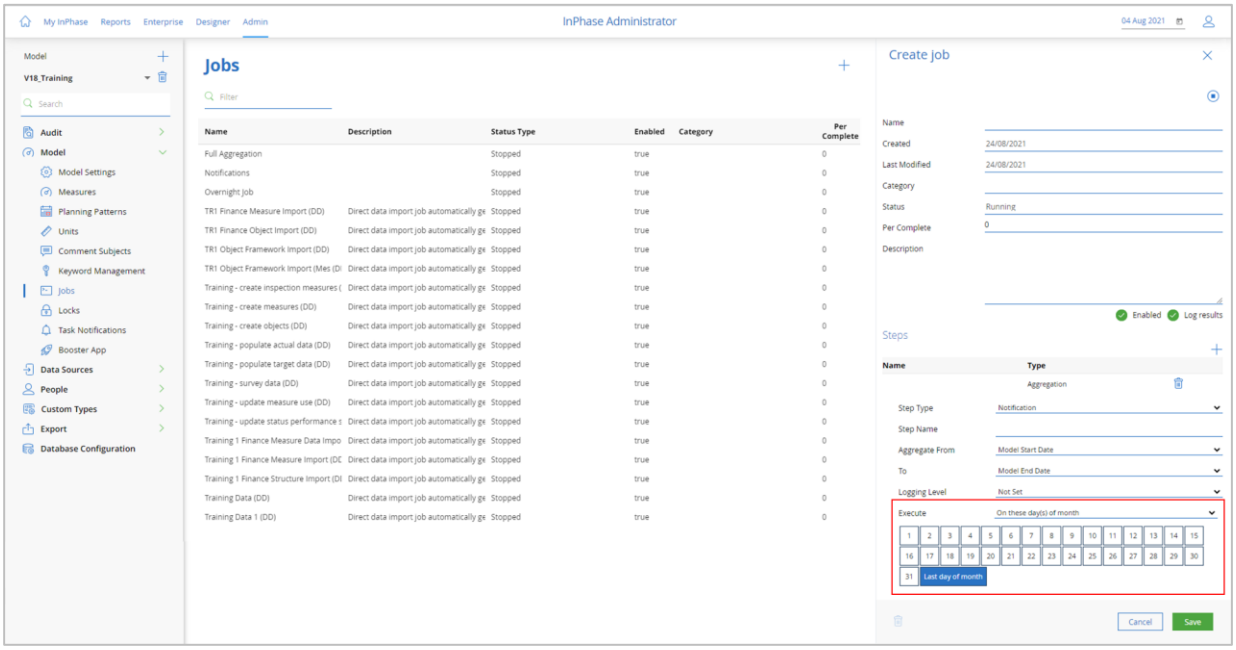
- None - will give optimal performance
- Process Level - will log entries for when the notification step started/completed
- Objective Level - will log entries for each individual object that is notified.
- Measure Level - will log entries for each measure that is notified.

- Set **Execute** options if you wish to restrict the days of the week or month that the step should execute. See the help topic Restricting Job Step Execution to Certain Days of the Week or Month for additional details on this
- When you are satisfied, click Save (or cancel to return without creating the step).

Restricting Job Step Execution to Certain Days of the Week or Month

When defining a job step you can set options that restrict or limit the execution of the step so that it will only run on specific days of the week or month. To do this, specify **Execute** options for the job step. The screenshot below illustrates these options for a Notification job step.





Editing a Job

To edit an existing job, click on the required job to open the quick edit panel. From this point on, Editing the job and the steps it contains is the same process as that for creating a job.

Running a Job

To run a job, click on the required job and select the ‘play’ icon in the quick edit panel. The Job will now start.

If the job has been disabled you will not be able to run the job. If the job is already running, you will not be able to run another instance of the job. Individual job steps will only run if the current date matches the **Execute** options defined for the step. See restricting job step execution to certain days of the week or month for further information

Stopping/Aborting a Job

To stop a running job (prior to completion), click on the required job and select the ‘stop’ icon in the quick edit panel. The Job will now stop in an orderly fashion - this may take a few minutes. While the job is trying to stop, the Status of the job will show a yellow indicator and the text “stopping”.

Enabling/Disabling a Job

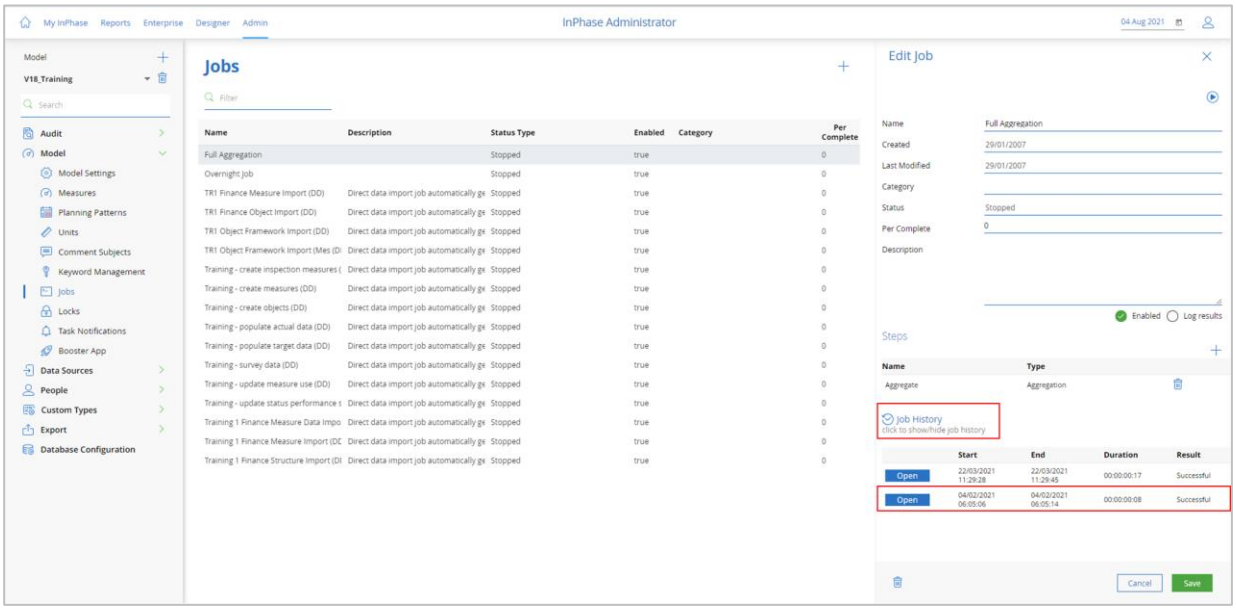
To enable/disable a job click on the required job and select Enabled so that becomes selected / unselected. Disabled jobs cannot be run (unless they are re-enabled).

Deleting a Job

To delete a job, click on the required job and click the 'bin' icon in the quick edit panel.

Viewing the history for a job

To view the history for a job, click on the required job and select Job History in the quick edit panel. The Job History dialog will be displayed showing the details of each time the job has been run and whether it was successful or failed. If the job had logging enabled when it was run, you can view the log file details by clicking on the required job history item.



Email Notifications of Job Execution

When a job executes it always runs as a specific employee. If this employee has a valid email address and you have correctly configured an SMTP email server then the employee will be sent an email notification when the job finishes.

See the topic Notifications: SMTP Server for information on configuring an SMTP server.

It is possible to configure the application in the following ways:

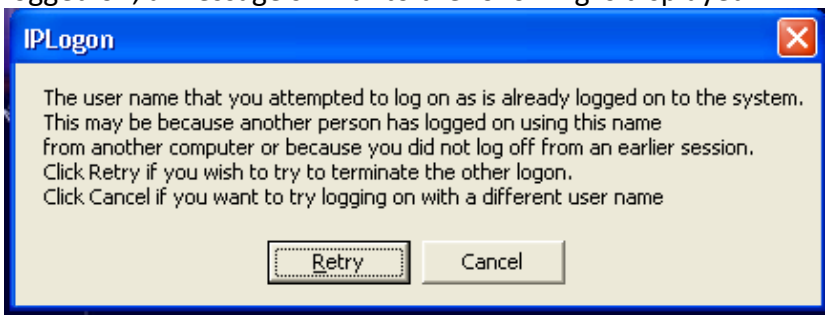
- No email notification is ever sent
- Notification is sent only on success or failure of a job
- Emails are sent to a specific email address rather than to the employee that executed the job
- Emails are CC'd to another email address

Contact support@inphase.com if you need information on how to do this.

Locks

If the server becomes unavailable while a user is logged in to the application, the session may not be closed down completely, leaving the user recorded as still logged into the model. This may also happen if the database is backed up while users are logged in, and then restored or if the network connection between a client computer and the web server fails whilst a user is logged on to.

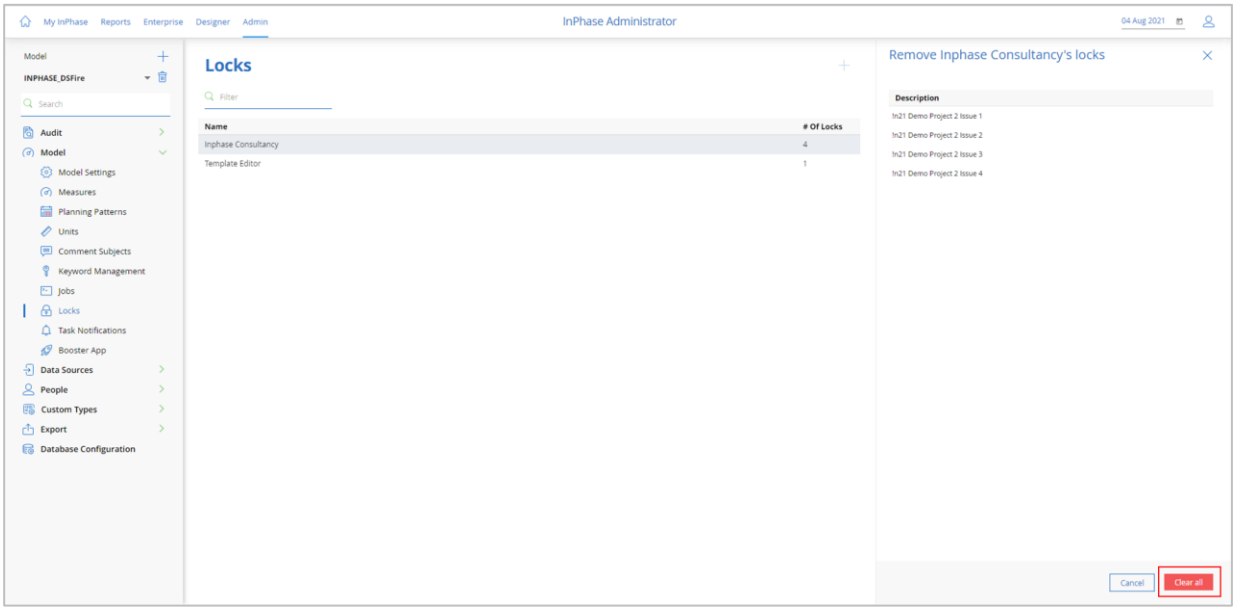
If a user attempts to log on to the Web applications when they are still recorded as being logged on, a message similar to the following is displayed:



If the user clicks Retry then the old logon lock is deleted and the session terminated and the user is allowed to log on.
If they click Cancel the login lock will remain in the database.

If you wish, you can manually remove the login lock as follows:

- Click Locks
- Select the user whose locks are to be deleted from the list of users. (Remember that all users currently logged into the selected model will have locks registered: take care not to delete locks for users currently using the application)
- Click ‘clear all’
- Choose Cancel to close the pop up without removing the locks
- Perform the following actions for each registered model database:



Task Notifications

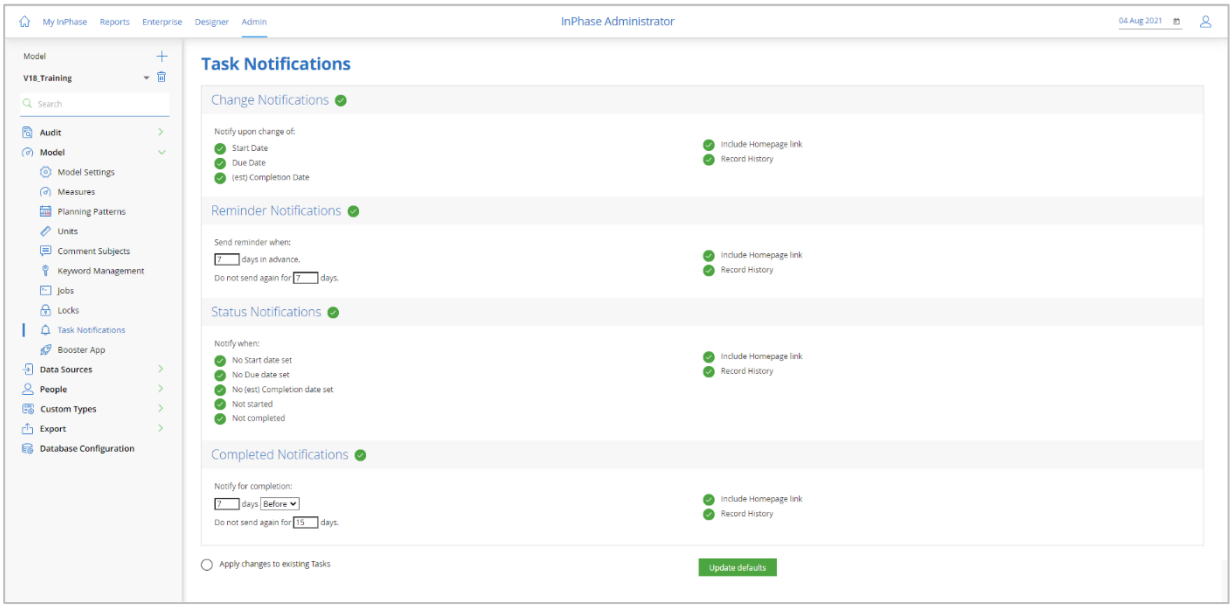
Task notifications can be configured to be sent to owners of tasks who have an email address defined in their user profile. There is array of variables for each type of task notification, which are:

- Change notifications – When one or more of the variables for a task changes
- Reminder notifications – When a task performance update deadline is approaching and resent following a grace period (if an update has not been provided in the grace period)
- Status Notifications - When one or more of the variables of a task has not been set
- Completed Notifications – When a task estimated completion date is approaching and resent following a grace period (if an update has not been provided in the grace period)

Task notifications are a global setting across the InPhase model based on the variable is defined and cannot be configured be set (or customised) for some tasks but not others. Task notifications can be configured for existing tasks or just tasks created from this point on.

To set the task notifications to apply to all existing tasks, click '**apply changes to existing tasks'** Once the required variables are set, click '**update defaults'**.

Notifications are sent automatically from the notification job step. See creating a notification step for further information



Booster App

InPhase develop many pre-developed modules that will integrate with your InPhase Model. The Booster App will then be used by your InPhase Consultant to integrate modules into your InPhase Model. Please contact your InPhase Account Manager for further information.

Data Sources

Live Connect

InPhase reports can also display live data which is held in external stores including data warehouses, record level applications databases, and spreadsheets.

For further information, please see the InPhase Help Centre.

Scheduled Import

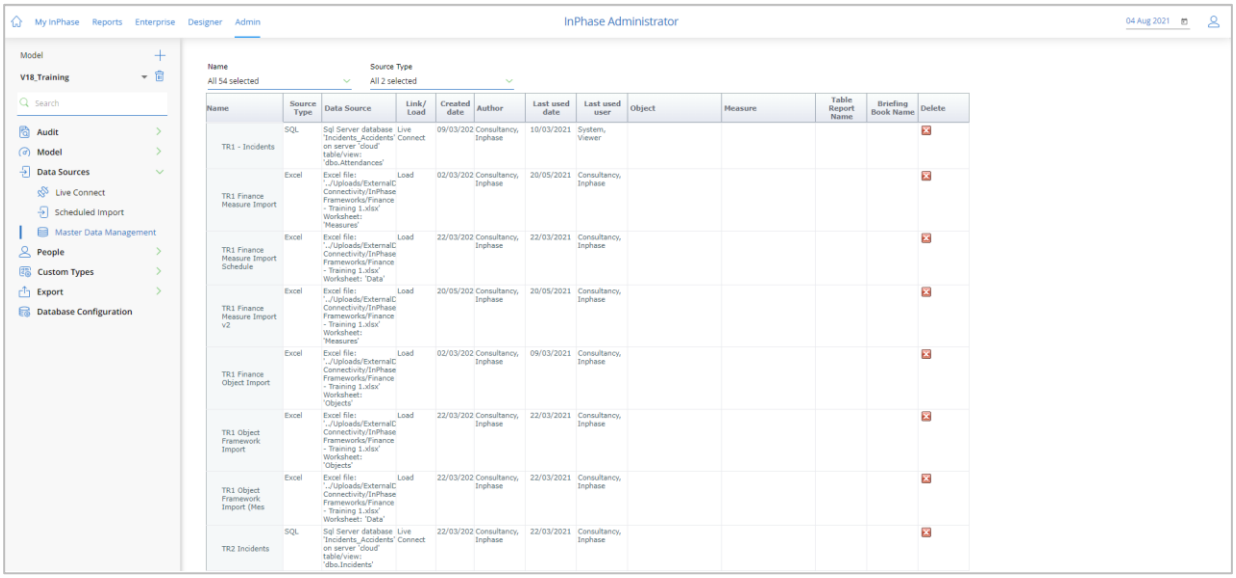
This enables InPhase to connect to external data sources to import frameworks and data into Object Measures.

Measures of pre-aggregated data that are stored in InPhase can also be indexed to a live connection for drill through to the record level data in an application database, or a data warehouse. This enables the pre-calculated aggregated time series data to be instantly available (from within the InPhase database without querying the source system) and yet enable the detailed drill-through to the source system to see exactly which records make up a specific total value.

For further information, please see the InPhase Help Centre.

Master Data Management

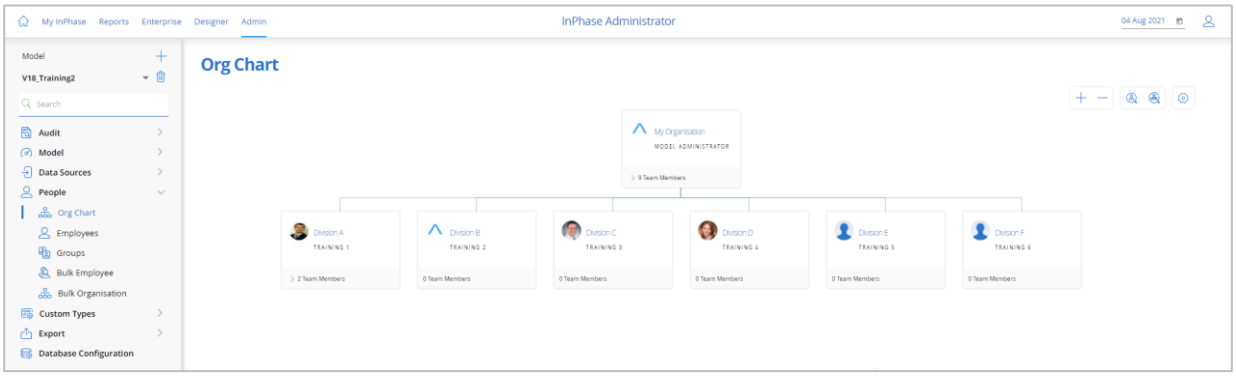
The data management screen shows all live connections and scheduled imports. These can be deleted using the red cross icon to the right of each row. As with the audit log, additional fields can be accessed through the dimension panel to be used as columns within the report or as slicers.


My InPhase
Reports
Enterprise
Designer
Admin
InPhase Administrator
04 Aug 2021
Model
V18_Training
Search
Audit
Model
Data Sources
Live Connect
Scheduled Import
Master Data Management
People
Custom Types
Export
Database Configuration
Name
All 54 selected
Source Type
All 2 selected
Name
Source Type
Data Source
Link/ Load
Created date
Author
Last used date
Last used user
Object
Measure
Table Report Name
Briefing Book Name
Delete
TR1 - Incidents
SQL
Sql Server database 'Incidents_Accidents' on server 'cloud' table/view: 'dbo.Attendances'
Live Connect
09/03/202
Consultancy, Inphase
10/03/2021
System, Viewer
TR1 Finance Measure Import
Excel
Excel file: '../Uploads/ExternalConnectivity/InPhase Frameworks/Finance - Training 1.xlsx' Worksheet: 'Measures'
Load
02/03/202
Consultancy, Inphase
20/05/2021
Consultancy, Inphase
TR1 Finance Measure Import Schedule
Excel
Excel file: '../Uploads/ExternalConnectivity/InPhase Frameworks/Finance - Training 1.xlsx' Worksheet: 'Data'
Load
22/03/202
Consultancy, Inphase
22/03/2021
Consultancy, Inphase
TR1 Finance Measure Import v2
Excel
Excel file: '../Uploads/ExternalConnectivity/InPhase Frameworks/Finance - Training 1.xlsx' Worksheet: 'Measures'
Load
20/05/202
Consultancy, Inphase
20/05/2021
Consultancy, Inphase
TR1 Finance Object Import
Excel
Excel file: '../Uploads/ExternalConnectivity/InPhase Frameworks/Finance - Training 1.xlsx' Worksheet: 'Objects'
Load
02/03/202
Consultancy, Inphase
09/03/2021
Consultancy, Inphase
TR1 Object Framework Import
Excel
Excel file: '../Uploads/ExternalConnectivity/InPhase Frameworks/Finance - Training 1.xlsx' Worksheet: 'Objects'
Load
22/03/202
Consultancy, Inphase
22/03/2021
Consultancy, Inphase
TR1 Object Framework Import (Mes
Excel
Excel file: '../Uploads/ExternalConnectivity/InPhase Frameworks/Finance - Training 1.xlsx' Worksheet: 'Data'
Load
22/03/202
Consultancy, Inphase
22/03/2021
Consultancy, Inphase
TR2 Incidents
SQL
Sql Server database 'Incidents_Accidents' on server 'cloud' table/view: 'dbo.Incidents'
Live Connect
22/03/202
Consultancy, Inphase
22/03/2021
Consultancy, Inphase

People

Org Chart (Organigram)

The organigram is a hierarchical organisational structure, showing the different departments within an organisation and where they sit. It also states the manager of each department along with its team members

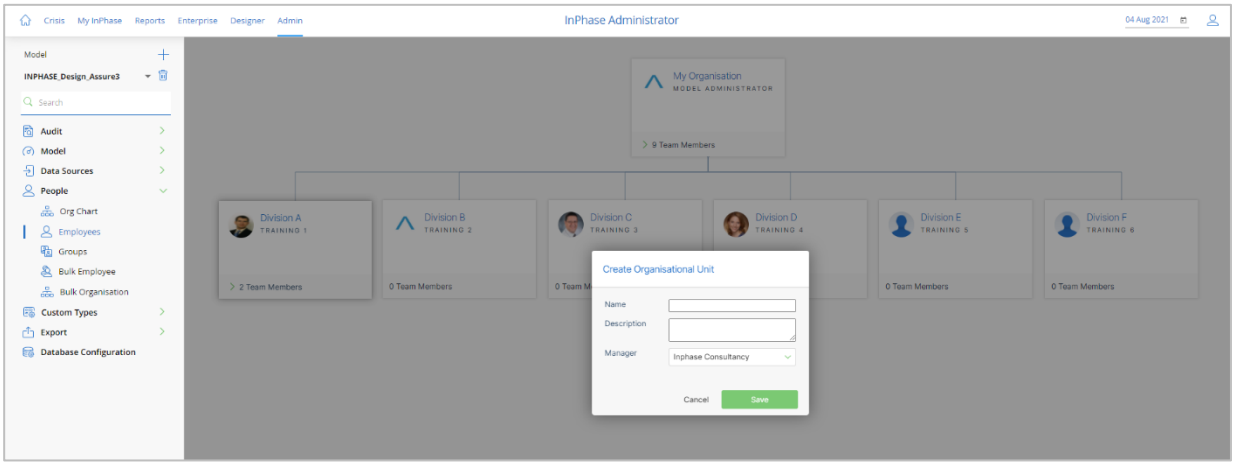


The organigram is an absolutely vital component of InPhase (v17 onwards) and needs to be kept up to date and as accurate as possible to be able to view a clear structure of the organisation with managers and members.

The more important reason is that when creating new objectives, the 'ORG Unit' has become a mandatory field. If the 'ORG Unit' is inaccurate it will lead to storing objectives within wrong ORG Unit. When creating new objectives, by default, InPhase will adopt the same approach as a default ORG unit however, this can be changed on the notebook

How to Create/Update the ORG Structure?

When viewing the organigram, you can create a new department by right-clicking anywhere in the grey area (not on a department) and select 'Create New'.

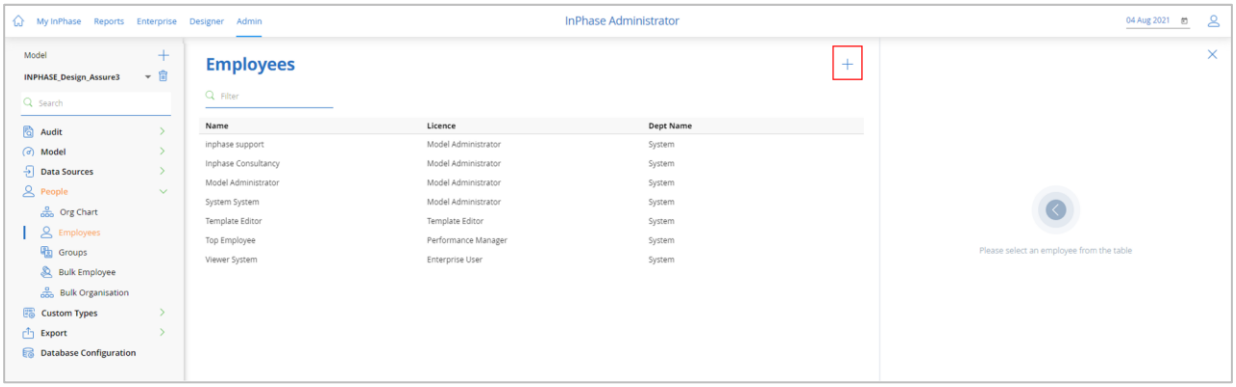


Users can be dragged and dropped to become part of the appropriate 'ORG Unit' or can be updated via the user's profile.

Employees

Creating User Records

Users must be created separately in each model they require access under the "Employees" option. To create a new user click the + and complete the details required for the login to be created.



Information contained within the Details and Notifications tab can be updated by the user themselves through their profile. InPhase recommends not completing any fields on the user record that you do not need specifically within InPhase, e.g. telephone number, because it will create a maintenance overhead.

Standard Roles / Licences

To access InPhase, the user account must also be assigned a licence. Once the user account is created, simply select the user to you want to assign a standard role (or change a user's standard role) to activate the quick edit user panel. Use the scroll icon to select the **roles** option

Use the scroll icon the in the quick edit panel to select Roles. An InPhase licence can be assigned by clicking on the dropdown list a selecting the appropriate licence type.

- ✓ **Model Administrator**
  The Model Administrator manages the infrastructure data for the model, grants users access permissions, manages custom security roles and groups, and always has full authoring and editing permissions on all locally defined entities.

- ✓ **Performance Modeller**
  Performance Modellers can create objects, measures, and reports. By default they have full authoring permissions on all locally defined entities.

- ✓ **Performance Managers**
  Performance Managers can create objects, measures, and reports. By default they have authoring permissions on those entities that they create.

- ✓ **Reporters**
  Performance Reporters can make full interactive use of all the reports created by Performance Modellers and Managers and can build these into Portals.

- ✓ **Briefing Book Viewer / Enterprise User**
  Briefing Book Viewers can browse all Portals for which they have permission, and can create tasks and enter data and comments for objects, measures, and tasks which they own, or for which they have Value Entry permissions

Groups (Custom Roles)

Groups mean you can group together users with any of the above licence types and apply permissions to an entity. Adding these permissions at the top level (Author, Edit, Value Entry and View) will mean that the users in the group will be able to perform the processes that their licence allows. For example, an Enterprise user will only have permissions to add data and amend object properties… they won't suddenly be able to delete the objective!

Custom Security Roles enable the Model Administrator to manage access to Reports, Objects and Measures for specific groups of users. The Model Administrator can create groups of users with similar requirements, or who need similar permissions on objects, measures and reports.

These Custom Roles can be granted Permissions on Entities in just the same way as Standard roles or individual employees. (Note: A user cannot be given a higher level of access through a Custom Role than is permitted in their Standard Role).

Example:
An organisation is made up of an overall parent structure, and several autonomous business units. By defining Custom Roles to fit each business unit, the Model Administrator can manage who can access which areas of information. Each unit will be able to see their own performance, but not the performance of the objects and measures owned by the other business units.

Groups of users or 'Custom Roles' (the bold entries in the list) can be added via InPhase Administrator and mean that you can manage access to the system far more easily than adding individual users to the permission levels. This will also help your ongoing development as when licence holders get added to the system or move on, all you need to do is add them to the relevant Custom Role(s).

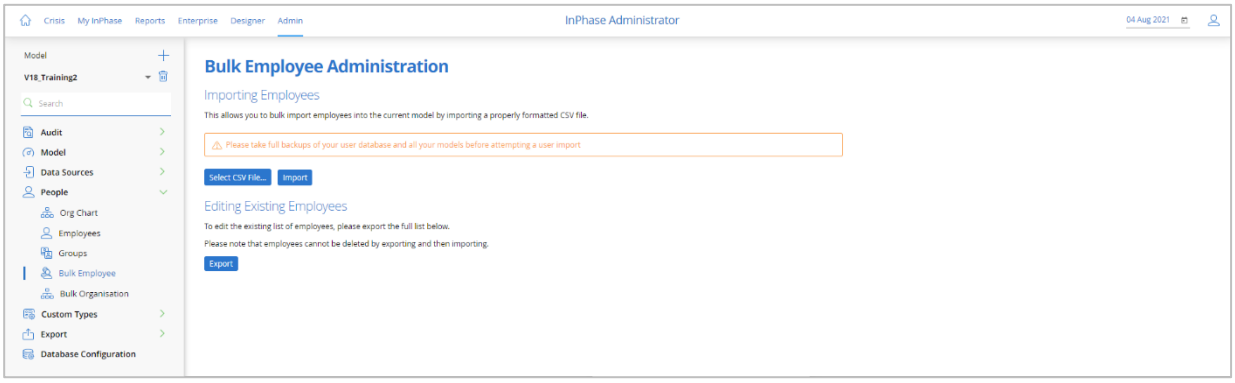
Managing Groups

Click the + to create a group. Enter a name (and optional description) for the group and use the edit icon to add licences InPhase users to the group. To edit groups, simply click on the group and click the edit icon to make the required changes.

Bulk Employee

This functionality is available to support Model Administrators to create / update employees in bulk. We recommend that you export the existing Employee details first, open in Excel, make changes and additions, and reimport.

Take a database backup in case of need. If your model is hosted in the InPhase Cloud, please contact support@inphase.com to request this to be undertaken before re-importing.



Bulk Organisation

This functionality is available to support Model Administrators to create / update the organigram in bulk. We recommend that you export the existing departments details first, open in Excel, make changes and additions, and reimport.

Take a database backup in case of need. If your model is hosted in the InPhase Cloud, please contact support@inphase.com to request this to be undertaken before re-importing.

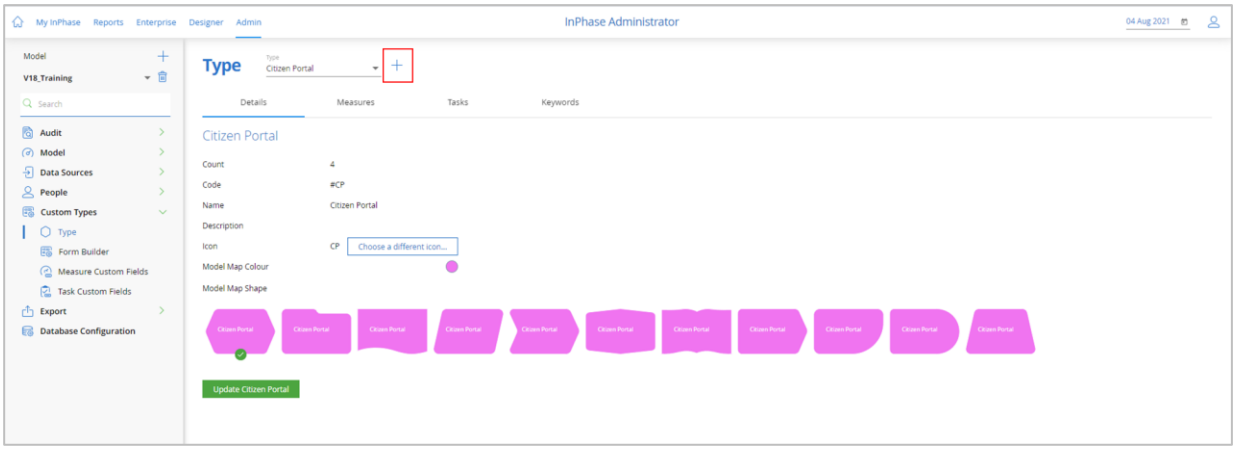
Custom Types

Type

You can create new object types in InPhase and edit the shape and colours of object types

. The main advantages of creating separate object types are:

- Object types can be used to specify criteria for widgets
- Forms can be built that reference fields that are relevant to particular object types



Details

Count

The number of objects in the InPhase model of a particular object type

Code

The code must begin with a hash symbol (#) followed by 2 letters. Do not use the codes #RM, #RC, #PR or #PG unless you are working with the InPhase supplied Risk or Project Add-ins. The full list of reserved object code prefixes (to avoid using) is:

• #AS	• #CS	• #CH	• #DY	• #EX	• #GC
• #GD	• #GE	• #GP	• #GR	• #HR	• #IN
• #MO	• #OU	• #OC	• #OH	• #RE	• #RS
• #RT	• #RC	• #RM	• #ST	• #SO	• #TO

Name
The name should be typed in its singular form (e.g. Incident, Complaint, Survey).

Description
The description allows an expanded name for the object to be included (e.g. This is an Incident Object). The description will appear as the default object description for all objects created of that type in the InPhase Model.

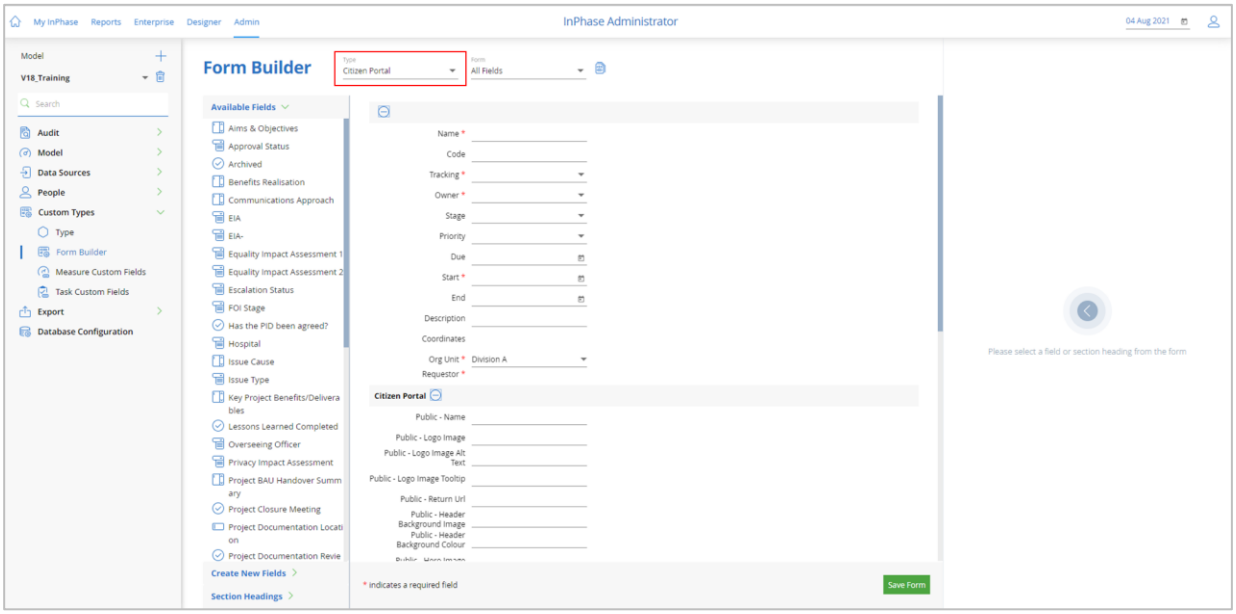
Icon
An icon can be displayed in the top right corner of the object when displayed in a model map. These should be uploaded onto the InPhase Server as Scalable Vector Graphic (SVG) format

Model Map Colour / Shape
The colour and shape of the object can be useful when displayed in a model map amongst lots of other types of objects. This can enable a quick, visual way to distinguish between different object types.

Measures
Default measures can be added to an object type. This will ensure that measures added to the object type will be added to objects created of that particular type. Measures can be created and added in the usual way. See measures section for further information

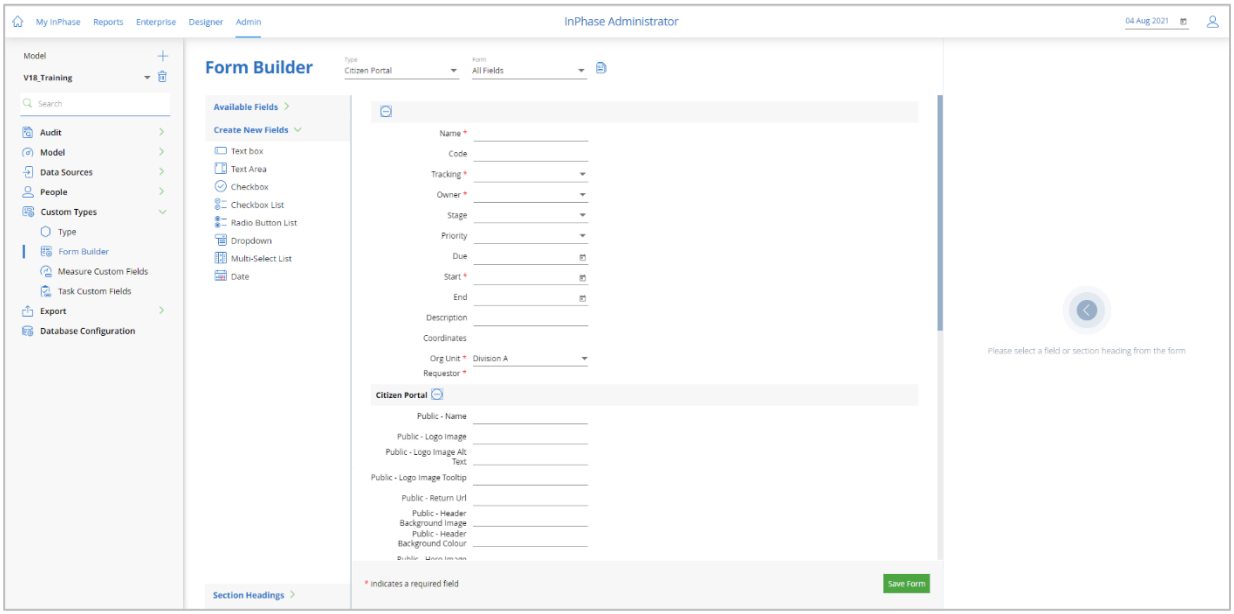
Tasks
Default tasks can be added to an object type. This will ensure that tasks added to the object type will be added to objects created of that particular type. Tasks can be created and added in the usual way.

Form Builder
All object types have some default fields available such as name, description, start date, etc. The fields available are customisable and you can add as many new fields to this list as you need. If you create different object type, you can separately customise the fields available for each type of object. To change the object type to which the form relates, click the object type dropdown list to change it.



You can edit the form for any object, and this will apply to all other objects of that type. The 'Available Fields' on the left allow you to add an existing field to this form. Note: the fields beginning 'Public' are for the implementation of citizen portal and are not to be used within standard objectives.

To add new fields to the form builder, select the **'Create New Fields'** heading from the left. This lists the different types of field you can create.



	Text Box	A single line area that allows the user to input either a text or numeric value. Setting the Field Type property will ensure that the text entered is validated against the specified type. Set to Text for text input, Float for decimal numbers or Integer for whole numbers.
	Text Area	A text box which spans several lines allowing for larger amounts of text
	Checkbox	This field presents a single option which can be “checked” to represent an on state or “un-checked” to represent an off state. Best used for single options with a “yes/no” or “on/off” answer.
	Checkbox List	This field presents a list of options to the user, who can select any, all or none of the options. Best used when there are multiple “correct” answers
	Radio Button List	This field presents a list of options to the user, however it limits the choice to a single option. Best used for multiple choice style fields where there is only one “correct” answer.
	Dropdown	This field presents a list of options where only one may be selected. Similar to a Checkbox list, it takes up less space by containing the options within a single box that is only visible when the field is clicked on. Best used when there are an abundance of options with only one “correct” answer.
	Multi-Select List	This field presents a list of options where multiple choices may be selected. Similar to a Checkbox List it takes up less space by showing the list of options in a popup window where users can move the either individual or groups of options between separate “Unselected” and “Selected” lists. Best used when there an abundance of options with multiple “correct” answers.
	Date	This field presents a calendar widget where users can select a specific date. We’re going to create a custom object field to record whether the objective is strategic or operational.

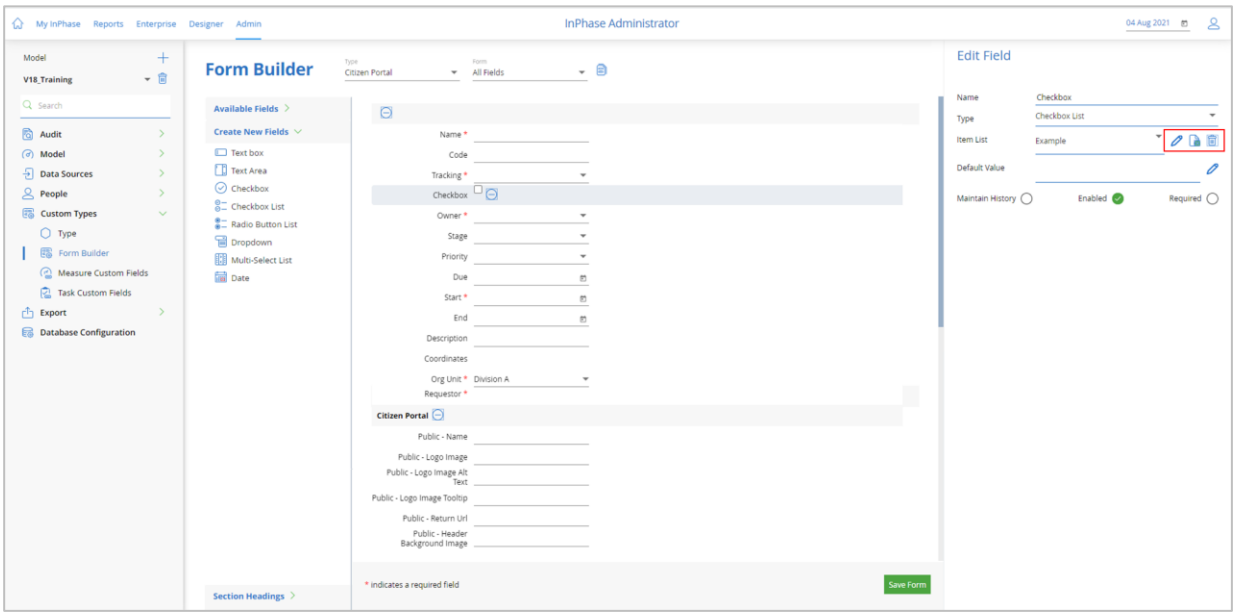
Note that the order of fields on the form can be changed and existing fields can be moved by dragging the name of the field to elsewhere on the form.

Editing Fields

Fields and lists can be edited by selecting the to open it in the quick edit panel

Name – Name of the custom field
Type – Type of field

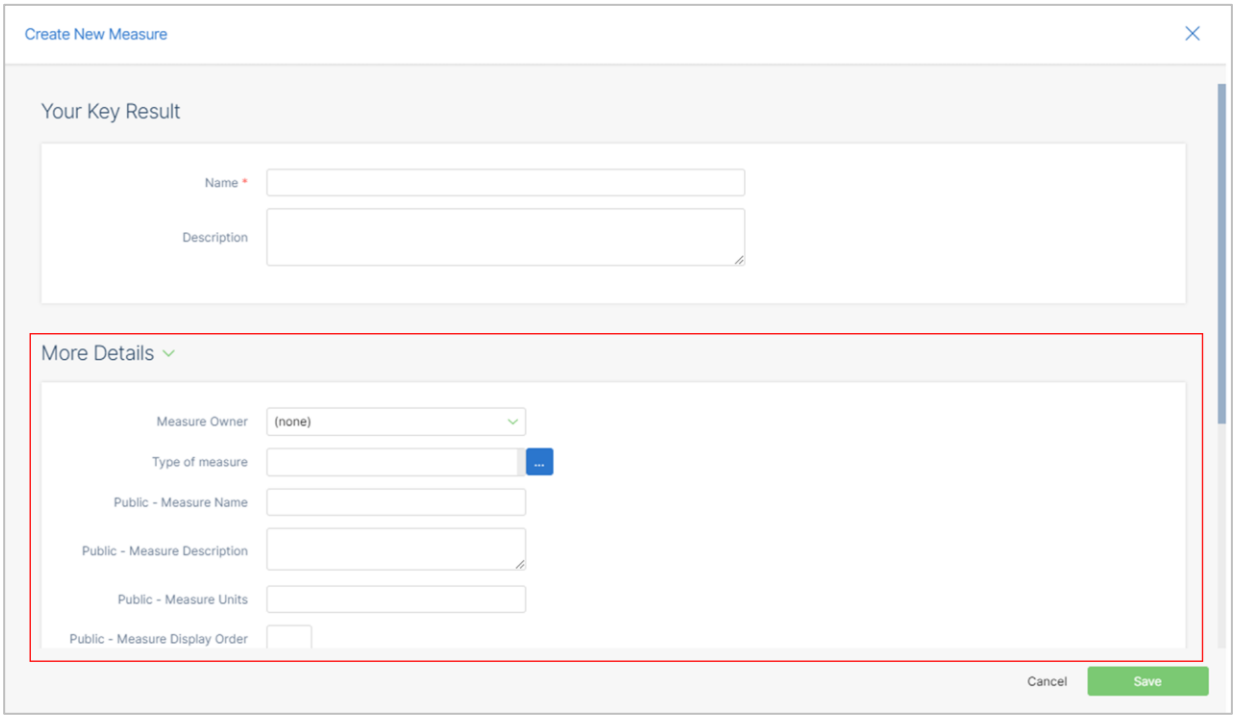
Items List – Field list options (if required)
Default Value – Default field list option (if required)
Maintain History – Main the history of field value changes
Enabled – Enable / disable the field
Required – Make the field mandatory



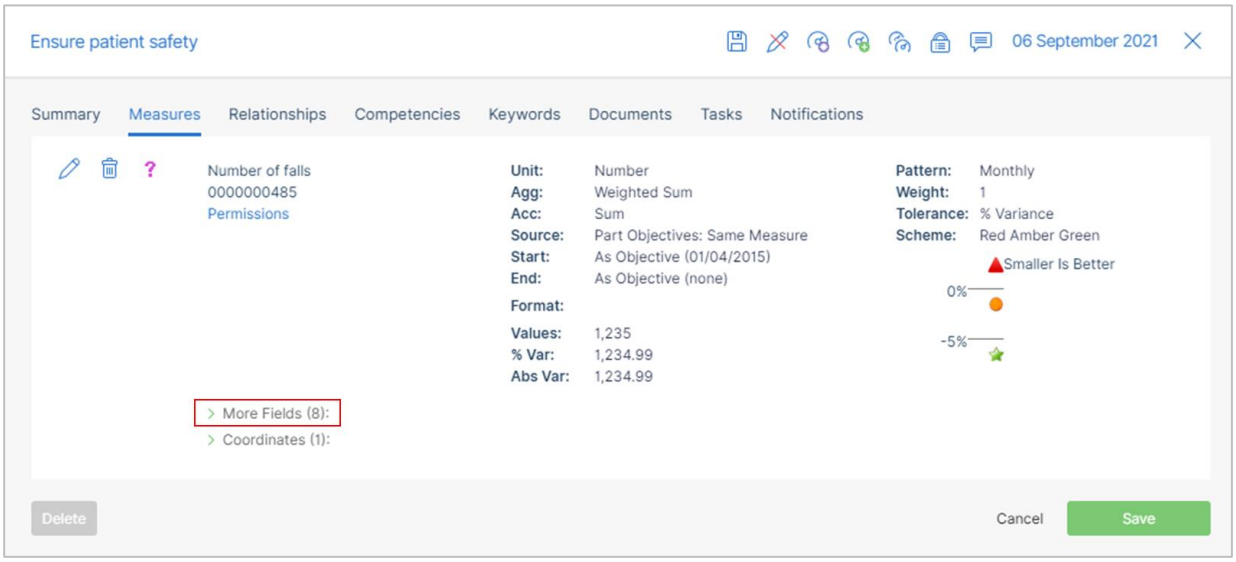
Custom Measure Fields

In a similar way, custom fields can also be added to measures. For example, you might want to flag measures which require data entry for target so that they can easily be presented in a trends. Or flag KPI measures which need to be reviewed by the performance board. Unlike fields in the form builder, a custom measure field will be available for all measures, regardless of which object types they are used in.

Once added, the custom field can be populated through the ‘more fields’ section in the measure properties, via the object notebook.



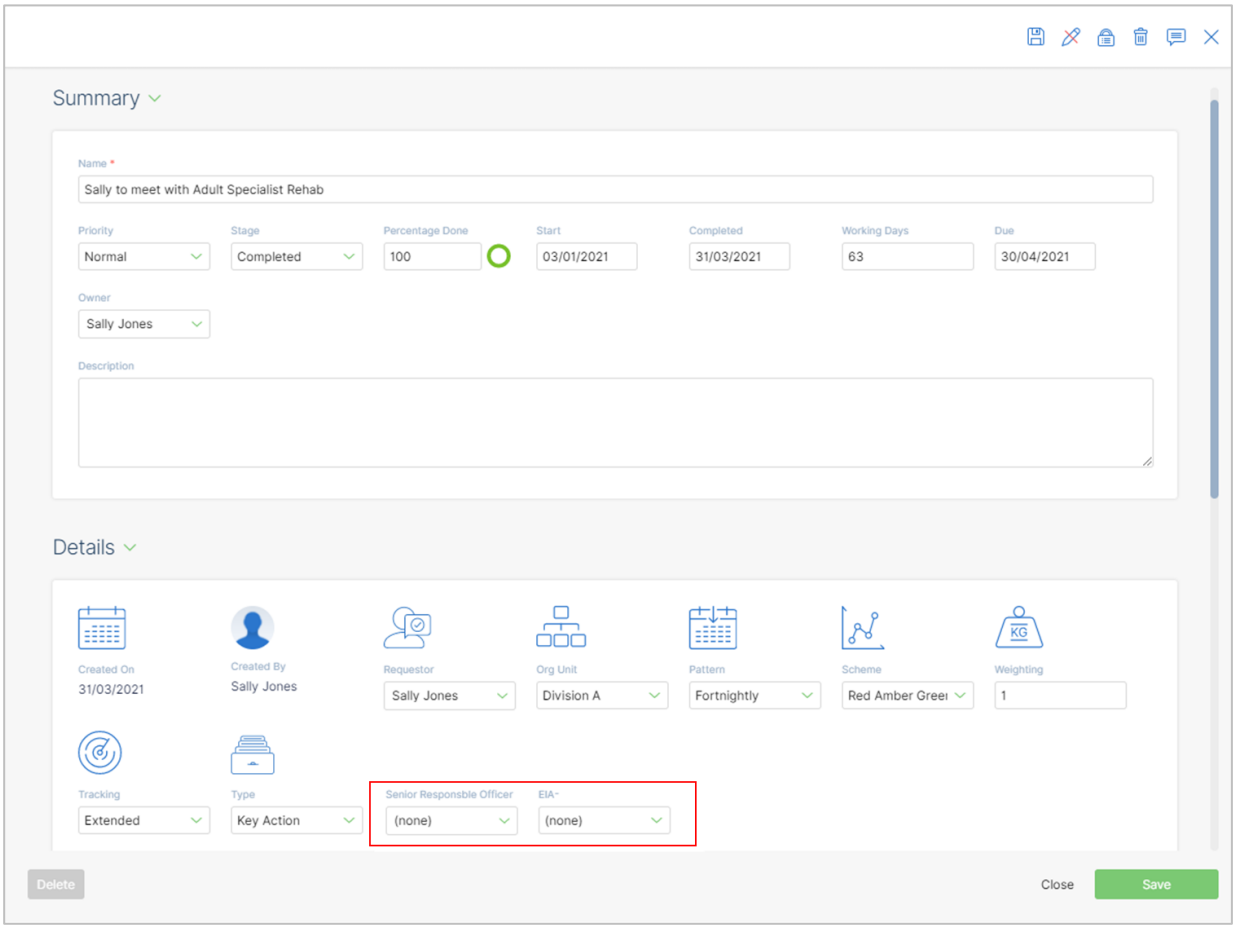
They can also be viewed from the summary of measures within the object notebook, under the > More Fields list.



Task Custom Fields

Custom fields can also be added to tasks. For example, you might want to flag tasks based on the type of task (e.g. audit task, risk task, business planning task etc.).

Once added, the custom field can be populated through the ‘details section in the task properties, via the object notebook.



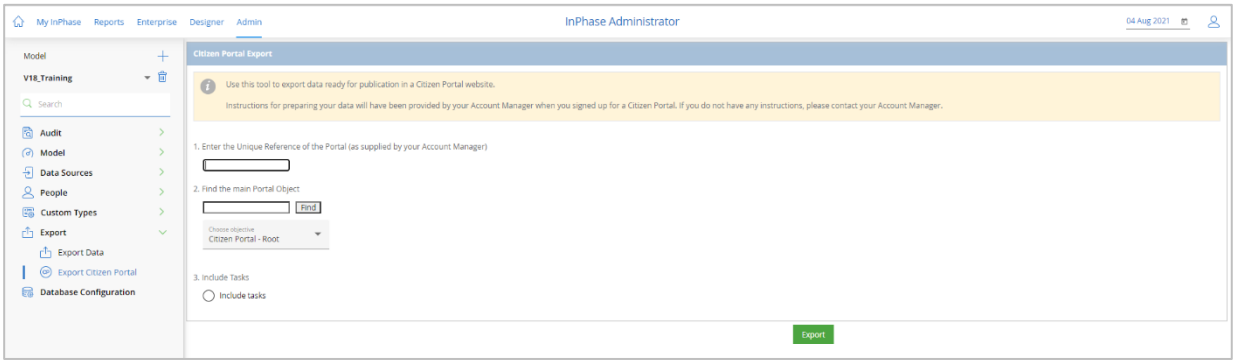
Export

Export Data

InPhase can import and export actual and target values between models, for datasets created in the criteria builder. The facility does not export/import other data series (e.g. benchmarks); O:M settings; reports or views.

Export Citizen Portal

Data is exported from the InPhase enterprise application using the Citizen Portal Export utility. Please see the Citizen Portal Export utility help in InPhase for instructions on how to use the utility and prepare your Objects for export.



Database Configuration

(These settings should not be amended if InPhase Cloud Hosted)

Caution:

The configuration settings affect ALL users of the application. Setting the Database Name or Server Name to incorrect values will prevent the application from connecting to the user database. This will prevent people (including yourself) from using InPhase Administrator and the Web Application. Fixing this problem involves editing the registry or pplus.config file on the Web Server and should only be attempted by qualified technical support personnel.

The options are described below.

General

Web Site URL

The URL to the virtual directory that has been created on the web server for accessing the application. This value will be the same as the one used in the login screen.

This setting cannot be changed using the User / Model Database Configuration dialog.

Publish Path

The default path to folder where jobs that publish Briefing Books output the published data. When you create jobs that publish Briefing Books you can specify a different location than the default if you wish.

The Publish Path can be defines as a UNC name to a shared folder or as a local path. UNC names are usually formatted as:

- \\ServerName\ShareName\PathName
  Where PathName is a path to a folder within the share

Local path names are generally formatted as:

- DriveLetter:\PathName

If you specify a local path name then it must refer to a path on the Web Server.

When an InPhase Application is installed on the Web Server a user name and password will have been specified by the person that installed the software. The user that was specified must have permission to create and delete folders and files within the folder identified by the Publish

Path. If Publish Path is not defined then job steps that publish Briefing Books must define a path other than the default.

Disable HTML 'Mailto:' Links

If you set this option, then when people use the Web application all email links are disabled. This means that when email addresses are displayed clicking on the address will not attempt to automatically start up your email client software. This option is useful if people use an email client that does not fully support the 'MAILTO' protocol.

Database: Server Name

The name of the server and, if appropriate, the instance name on which the user and model administration database is located. The application must know the location of a valid model and user database in order to function. The value is set during the initial installation and setup of the application. Consult the Installation manual for details.

Setting this option to an invalid value will make it impossible to use the web application or InPhase Administrator. This option should not need to be changed after initial installation.

Database Name

The name of the user and model administration database that is being used by the installation that is referenced by the Web Site URL. The application must have a valid model and user database in order to function. Their values is set when and the database is created during the initial installation and setup. Consult the Installation manual for details.

Setting this option to an invalid value will make it impossible to use the web application or InPhase Administrator. This option should not need to be changed after the application has been installed.

Notifications: SMTP Server

The name of the SMTP Server that the application uses in order to send email notifications. The server must be configured to run an SMTP Server that allows email relaying from the Web Server. Please consult your SMTP Server documentation for details on how to achieve this. For details of the SMTP Server included with the Windows Operating System look in the Windows help system.

Change this setting if you want email notification to work with a different SMTP Server.

Notifications: Email Address

The email address to be used by the Email Notification system. When the email notification system generates email messages, it uses this email address in its From: entry. Some SMTP email servers insist that this must be defined as a valid email address on the server whereas

others will allow you to specify a fictional address. Check with your email server administrators if you need additional information. If you use a real email address here, consider that users who receive email alert notifications may send replies, in which case the inbox will need examining and tidying from time to time.

Reporting: Report Manager URL

The URL specifying the location of the SQL Server 2005 reporting services web site. Check with your SQL Server 2005 administrator if you need to know the correct value to use.

Authentication

Use InPhase™ Authentication Only

If this option is set, then whenever a user attempts to connect to the web application they will be prompted to enter a valid InPhase application username and password.

Use Windows Integrated Authentication Only

If this option is set, then whenever a user attempts to connect to the web application an attempt is made to connect them using their currently logged on Windows use name credentials.

In order for this to work, their Windows username and domain name must have been mapped on to their InPhase application username and the user must be logged on to the Windows network via one of the domain names entered in the Domains text box.

If the windows user is not logged on to one of the domains listed in the Domains text box, or if their logged on Windows domain and username does not exactly match one that has been mapped on to an InPhase Application user, then the user will not be permitted to log on.

This option should only be used if:

- All users log on to one of the domains listed in the Domains text box
- You intend to map all users to appropriate Windows domain and user names
- Internet Explorer on each users machine is configured in such a way that user credentials are passed to the Web server. Typically this will only be the case if users access the Web application within an local Intranet

Use Windows Integrated Authentication with InPhase™ Authentication as a Fallback

If this option is set, then whenever a user attempts to connect to the web application an attempt is made to connect them using their currently logged on Windows use name credentials.

In order for this to work, the Windows domain and user name must be mapped on to an InPhase Application ® user name and the user must be logged on to the Windows network . If the windows user is not logged on Windows domain and user name is not mapped on to an InPhase Application user, then the user will be prompted to supply a valid InPhase Application user name and password.

Passwords

The password related settings allow you to control how passwords are managed within the application.

Screenshot

- Force new users to change password at first login

  This only affects users that are created when the option is enabled. These users will need to know their initially assigned password before they are permitted to change it.
- New users default password
  -
  This defines the default password that should be used whenever you create a new user on the system.

  If you have never specified this then the default password is: password

The following settings allow you to define complexity or strength rules that should be applied whenever users change their passwords. The rules do not apply to existing passwords nor do they affect the Default password that you can specify for new users.

Minimum length	Since all users must have a password, a value of 0 actually means that the minimum password length is 1 character
Minimum alphabetic	The minimum number of alphabetic characters that must be included in a password. Alphabetic means: • A through Z • a through z
Minimum lowercase	The minimum number of lower case alphabetic characters that must be included in a password. Lowercase alphabetic means: • a through z
Minimum uppercase	The minimum number of uppercase alphabetic characters that must be included in a password. Uppercase alphabetic means: • A through Z

Minimum numeric	The minimum number of numeric characters that must be included in a password. Numeric means: • 0 through 9
Minimum non-alphanumeric	The minimum number of non-alphanumeric characters that must be included in a password. Non alphanumeric means: • not A through Z • and not a through z • and not 0 through 9
Minimum non-alphabetic	The minimum number of non-alphabetic characters that must be included in a password. Non alphabetic means: • not A through Z • and not a through z

The following settings allow you to manage password aging within the application:

Minimum password age	This is the minimum age, in days, that a password must be before a user is allowed to change it. A value of zero disables this option.
Maximum password age	The maximum age, in days, that a password is allowed to be after which the user is forced to change it before it can be reused. A value of zero disables this option.
Days before reuse	The minimum number of days that must elapse before a user is allowed to use reuse the same value for a password. A value of zero disables this option.