



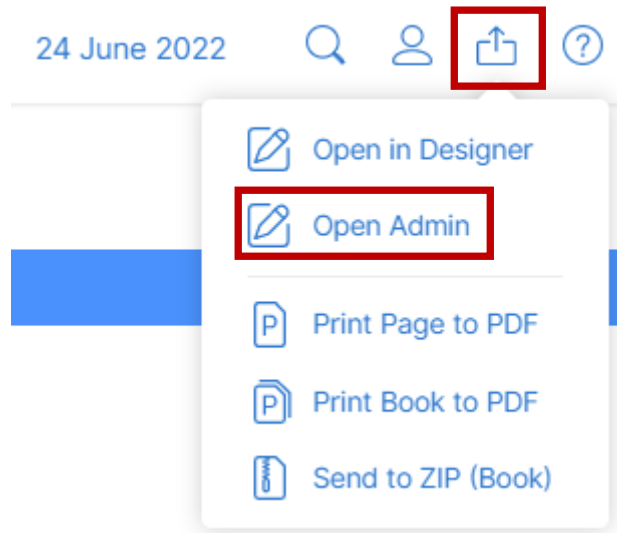
# InPhase – Question Manager User Guide

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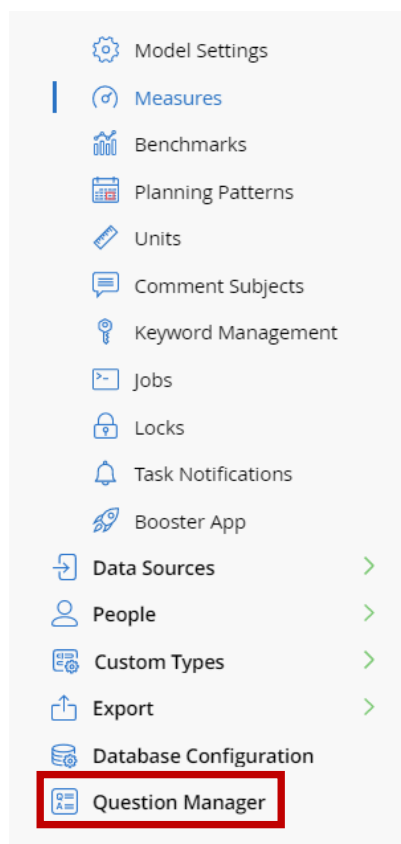
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## Accessing Question Manager

To access Question Manager, click on the 'Send to' icon in the top right hand corner of the screen, and then click 'Open Admin'.

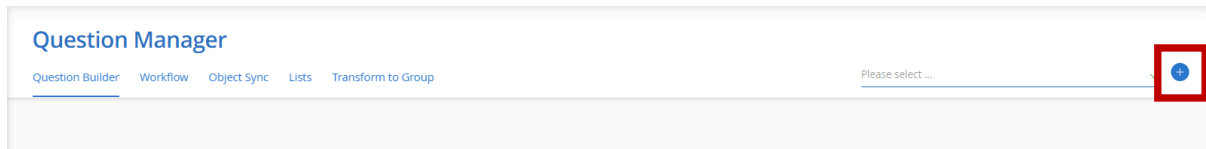


Once the Administrator tab has loaded, select 'Question Manager' from the left hand panel.



## Creating a New Questionnaire

To create a new Questionnaire, click on the blue '+' icon in the top right corner of the screen. Then add the name of the Questionnaire, and click 'Create'.



### Create New Questionnaire ×

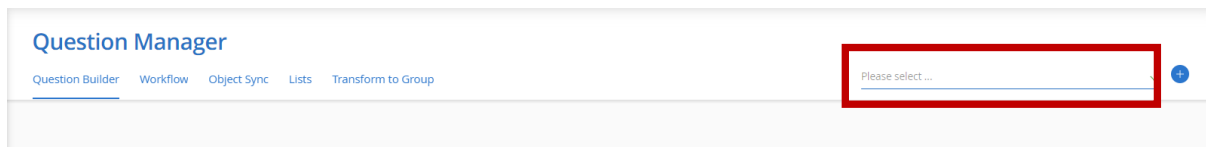
Name

Cancel

Create

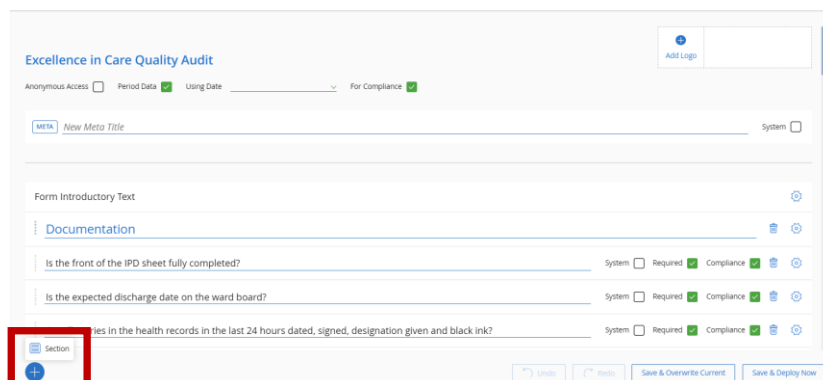
## Editing a Questionnaire

To edit an existing Questionnaire, select the relevant Questionnaire from the dropdown box in the top right corner of the screen.

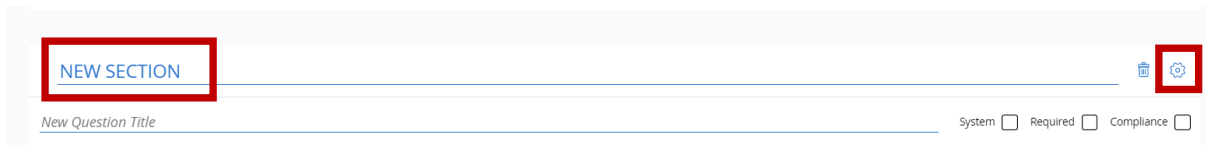


## Sections

The questions within a Questionnaire are grouped by Sections. To add a new section to a Questionnaire, click on the blue '+' icon in the bottom left corner of the screen, and then select 'Section'.



Next, enter the Section Name where the blue text reads 'NEW SECTION'.



The screenshot shows a form with a text input field containing 'NEW SECTION' in blue text, which is highlighted with a red box. To the right of the input field is a settings icon (a gear) also highlighted with a red box. Below the input field is a label 'New Question Title'. To the right of the input field are three checkboxes: 'System', 'Required', and 'Compliance', all of which are currently unchecked.

Click on the Settings 'cog' icon, to expand the Section settings.

## Section Settings

### Reporting Alias

The reporting alias determines how the section will display in a report. By default, this will take the Section name (up to 100 characters)

### Tasks Files and Links

Enabling each of these settings allows the user of the Questionnaire to create Tasks, add photos and links to the Questionnaire. The icons will appear at the top of the section.

Section 6

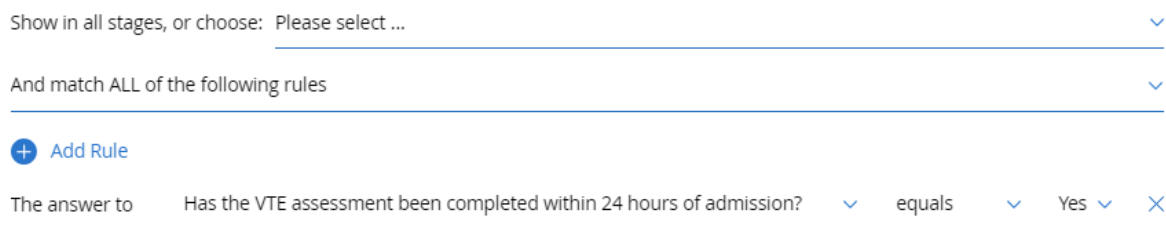


### When to Show

These settings control when the section will display in the Questionnaire. By default, the section will display in all stages.

The section can also display when certain 'rules' are met. First, the user must select whether ALL or ANY of the rules be matched for the section to display. Then, the user can set the criteria for the section, based on answers to other questions in the Questionnaire.

### When to Show



The screenshot shows the 'When to Show' settings form. It has a dropdown menu for 'Show in all stages, or choose: Please select ...' with a downward arrow. Below that is a dropdown menu for 'And match ALL of the following rules' with a downward arrow. There is a blue plus icon and the text 'Add Rule'. Below that is a form with the text 'The answer to' followed by a dropdown menu containing 'Has the VTE assessment been completed within 24 hours of admission?'. To the right of this dropdown are three more dropdown menus: 'equals', 'Yes', and 'X'.

The user can add as many rules as are required for the Questionnaire to function as intended.

### Explanatory Text

Any text entered here will display underneath the section heading. If the explanatory text exceeds 200 characters, it will be replaced with an icon, which when selected will display the full text.

## Section 6

*This is an example of explanatory text.*

### Repeatable

Sections can be repeated if there is a requirement to record multiple instances. For example, on an Incident Form, there may be a section for People Involved in the Incident. The number of people involved will vary from one Incident to another, therefore a repeatable section allows the user to add the relevant details for as many people as is applicable to that Incident.

When the repeatable section is enabled, a button will appear at the bottom of the section, allowing the user to repeat the section questions.

## Section 6

*This is an example of explanatory text.*

Test Question

Yes

No

n/a

Remove this section



Additional Section 6

### Deleting a Section

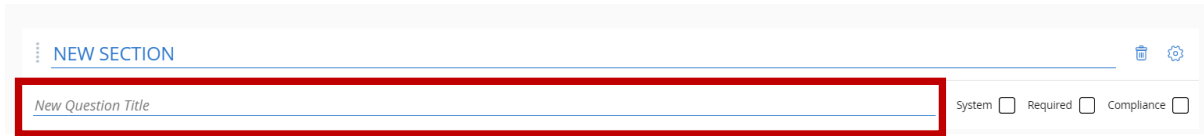
A section can be deleted by clicking on the 'bin' icon to the right-hand side of the section title. Deleting a section will also delete any questions which are part of the section.

Falls



## Questions

Once a section has been added to the Questionnaire, a line will automatically display for the user to enter a question.



NEW SECTION

New Question Title

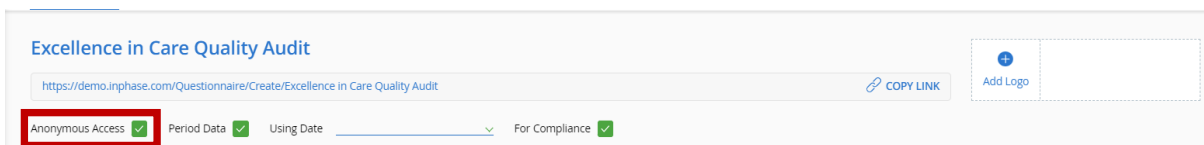
System  Required  Compliance

The user can type the question into the box or paste the text from an external source using the keyboard shortcut 'Ctrl + V'.

## Questionnaire Settings

### Anonymous Access

When this is enabled, users without an InPhase login can access and complete a Questionnaire. This can be used for scenarios where the Questionnaire is to be completed by someone outside of the organisation (eg: FFT Questionnaire). The Questionnaire itself can be accessed via a URL link, or from a QR code.



Excellence in Care Quality Audit

<https://demo.inphase.com/Questionnaire/Create/Excellence in Care Quality Audit> COPY LINK

Anonymous Access  Period Data  Using Date  For Compliance

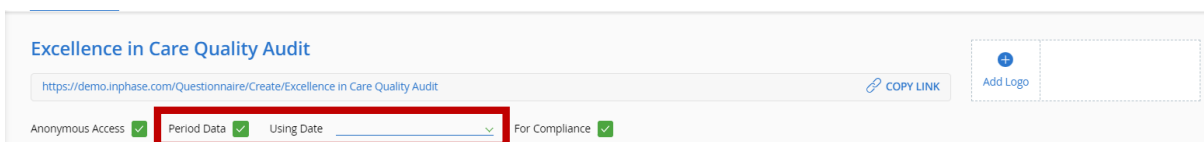
Add Logo

### Period Data

If you need to track the compliance of a Questionnaire (eg: an Audit/Survey) over time, the 'Period Data' option will need to be enabled.

When selected, the user will be able to select a date against which the Questionnaire data will be stored. By default this is the date the Questionnaire is submitted, however if the Questionnaire contains a question where the answer requires a date, this can be used as a period date for the data.

For example, some Questionnaires may be completed on paper, and then the data entered into the system at a later stage. If the Questionnaire contains a question 'Date Completed', this can be used to store the results against the answer given in the question.



Excellence in Care Quality Audit

<https://demo.inphase.com/Questionnaire/Create/Excellence in Care Quality Audit> COPY LINK

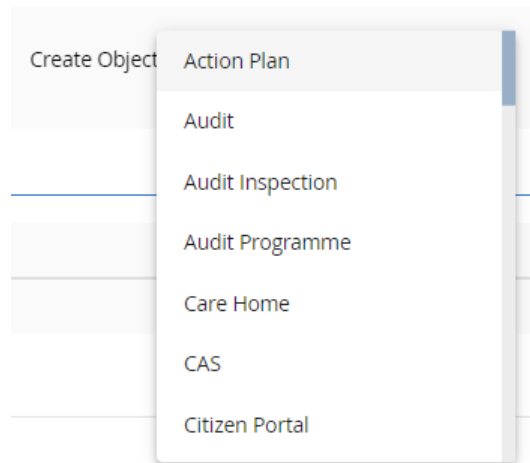
Anonymous Access  Period Data  Using Date  For Compliance

Add Logo

## Create Object

If the Questionnaire is not being used for periodic data capture, it can be used to create an object within the InPhase model. For example, the 'Incident' form, when submitted, will prompt the creation of a new 'Incident' object in the InPhase model.

The user can select from the dropdown box the type of object that will be created.



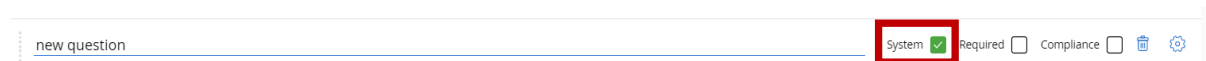
## Question Settings

The following settings function in the same way for questions as they do in sections:

- Reporting Alias
- When to Show
- Explanatory Text
- Repeatable

## System


Questions can be marked as 'system' questions, by clicking on the box to the right of the question text. A 'system' question **INSERT WHAT A SYSTEM QUESTION DOES HERE**



## Required


Marking a question as 'Required' means that it becomes mandatory, the questionnaire cannot pass through to the next stage unless an answer to the question is given. The required status of a question is only applicable when it is displaying in the Questionnaire.

For example, a Questionnaire may have a series of conditional questions, which only display if the user answers previous questions in a certain way. In this instance, the conditional questions can be made 'required', but the user will only be prevented from completing the Questionnaire if the required questions are displaying.

new question System  Required  Compliance   

## Compliance

If compliance has been enabled for the Questionnaire overall, the user will be able to indicate which questions are to be used when calculating the compliance. The user must select the 'Compliance' tick box against each relevant question.

new question System  Required  Compliance   

Once this is enabled, the user can then configure the individual compliance settings for the question.

## Compliance

Is this question a complete compliance failure override?

Value needed to pass

Yes 

If a non-compliant answer to a question should result in an overall compliance failure for the Questionnaire, the user should tick the 'Is this question a complete compliance failure override?'

The 'Value needed to pass' allows the user to select which answer is the 'compliant' option.

Please note that compliance can only be measured on questions that are answered with an option, which includes the following:

- Yes or No
- Yes or No or N/A
- One answer from a list
- More than one answer from a list

## Lock Question

This option allows the user to display a question, but lock down the answer once it has been entered, so that it cannot be amended.

This can be used in situations where the Questionnaire is passing through a number of different stages, and there is a risk of the initial answer being amended erroneously at a later stage.

Questions can also be locked when the Questionnaire sits in a particular stage.

## Lock question

Always Locked

Lock in stage: Please select ...



## Move To

This allows the user to move a question between sections. Questions can be manually moved between sections by 'drag and drop', however if the Questionnaire has many different sections, it may be more efficient for the user to use this feature to rearrange the questions.

## Move To

Move to another section

Please select ...



Confirm Move

## Question Type

This setting determines what sort of answer is required to the question. The most used types are detailed below. Depending on the type selected, the user may also be able to determine a default value.

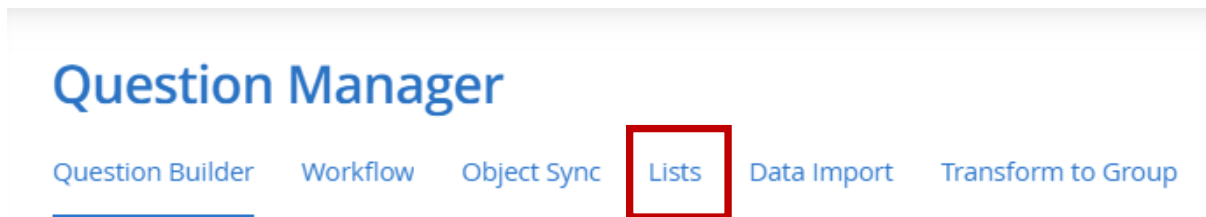
- Yes or No
- Yes or No or n/a
- One answer from a list
- More than one answer from a list
- One line of text (100 character limit)
- More than one line of text
- Date
- Employee (links through to the list of InPhase user accounts)

If you require details on other question types, please contact an InPhase Consultant or [support@inphase.com](mailto:support@inphase.com)

## Lists

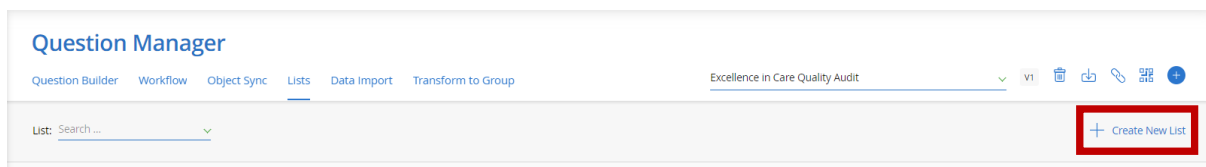
Some of the question types allow the user to answer the question by selecting one or more answers from a list.

The lists can be added, edited and managed via the 'Lists' tab at the top of the Question Manager window.

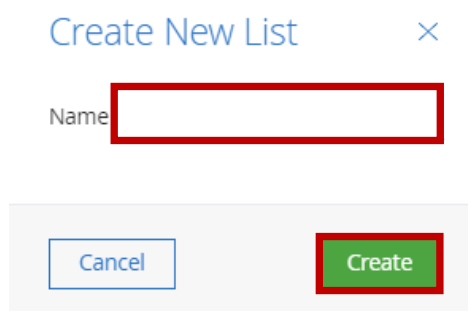


### Adding a List

To add a new list, click on the 'Create New List' button in the top right corner of the window.



Next, give the list a name, and click 'Create'. Please note that all lists must be named uniquely, and the name must be no more than 100 characters.



Once the list has been created, the following icons allow the user to rename the list, add items to the list, save and delete respectively.



When adding items to a list, the details can be pasted in from an external source using the keyboard shortcut 'Ctrl + V'.

Items within a list can be indented to create 'levels'. One example of this would be a Questionnaire where the user has to select a Location, then a Department at that location, and then a Team within that department.

By indenting the list options, the Questionnaire will automatically cascade the relevant options, so if the user chooses 'Location X' for the first question, the list of options is limited to the Departments of 'Location X', rather than the full list of departments.

The page itself contains instructions on adding indents to the list. A list with indents will display the different levels in the 'Question Builder' section, so the user can ensure they are selecting the correct level within the list itself.

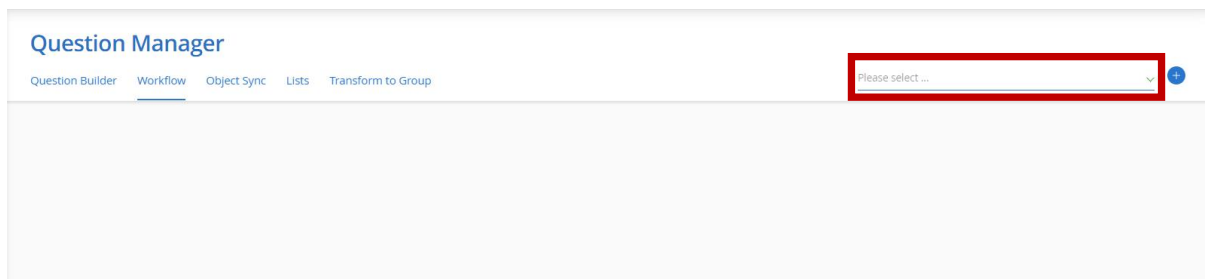


Once the list is complete, click on 'Done Editing', and then the 'Save' icon to ensure all changes are saved.

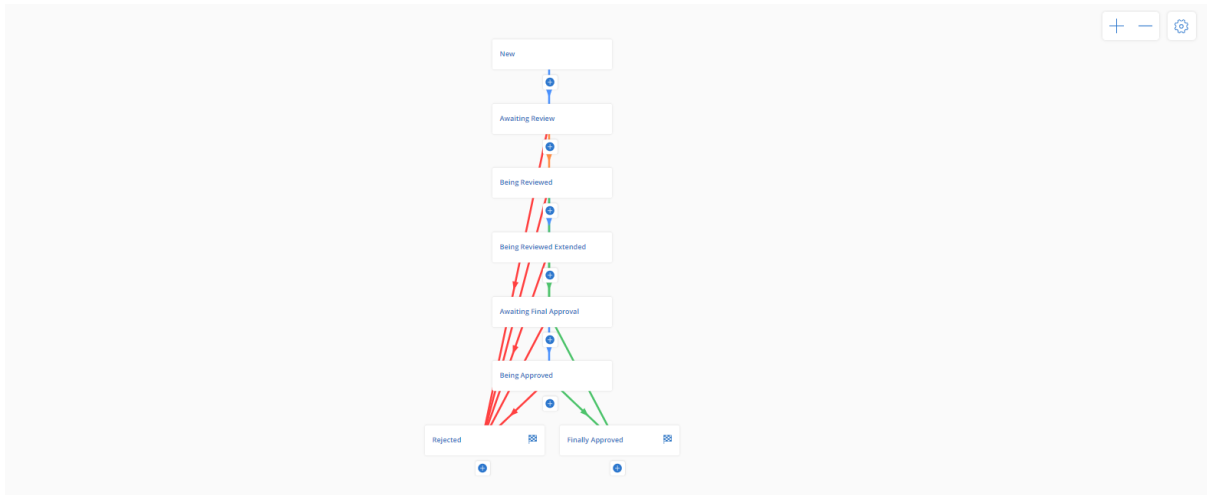
## Workflow

The Workflow tab allows the user to add additional 'stages' to their Questionnaire. This can be used in conjunction with the Question Builder to create more complex and comprehensive Questionnaires.

To edit a workflow, select the Questionnaire from the dropdown box in the top right corner of the window.

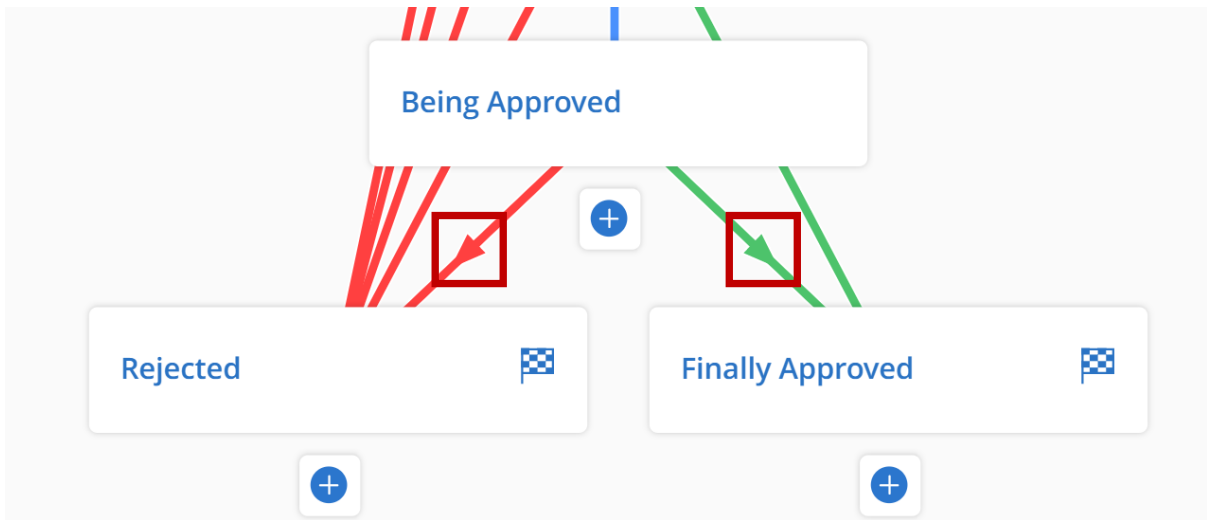


Once selected, the workflow map will load in the window. This visualisation displays all the 'stages' of the workflow, with each line displaying links between each of the 'stages'.

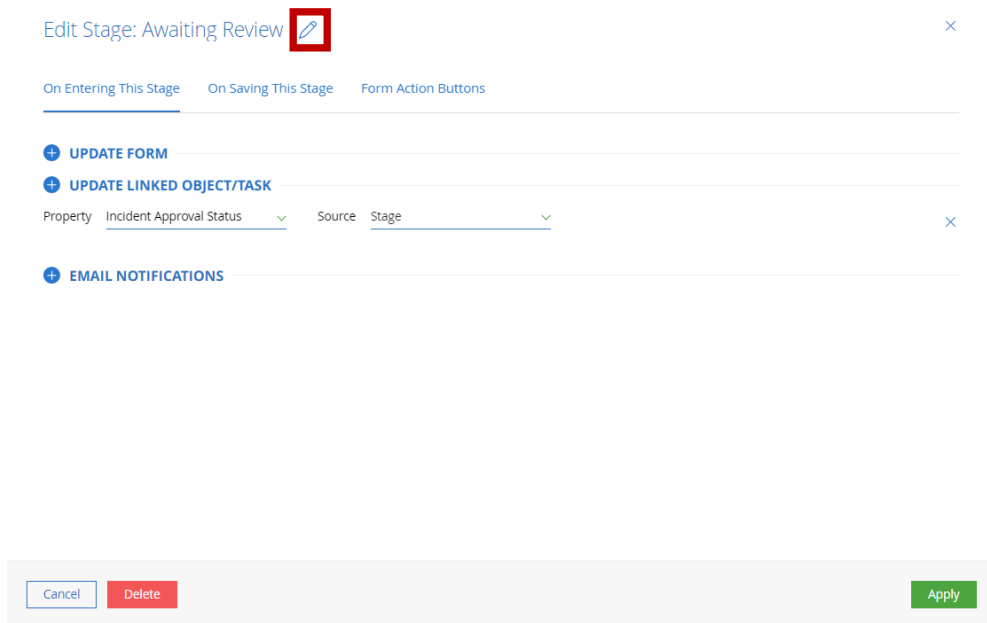


To add a 'stage', click on the blue '+' icon underneath the preceding 'stage'. You can break the links between stages by right-clicking on the link, and selecting 'Delete Link...'

New links can be added by clicking the 'cog' icon in the top right of the map, and selecting the 'Link' option. Then the user must click and drag a relationship link from one 'stage' to the next. The relationship will be created in the direction that the user draws the line, as indicated by the arrow on the map itself.



To view or edit the details of a workflow 'stage', double click on the name in the map.



To edit the Stage name, click on the 'pencil' icon next to the name.

## On Entering Stage

There are 3 ways to define the actions that occur when entering a stage.

- Update Form
- Update Linked Object
- Email Notifications

### Update Form

On entering a Stage, the Questionnaire (form) can automatically update question answers based on parameters set.

The user must choose the question from a dropdown list, then choose the 'Source' of the update. This can be from the following:

- Value from Question Answer (populates the question with an answer from a different question)
- Value is minutes from now (can set a date and time in the future, based on how many minutes from entering the stage)
- Value (the user can manually add what the value added is)

### Update Linked Object

If the Questionnaire creates an object (eg: Incident), the Questionnaire can update properties of the associated Object.

This works in a similar way to updating the form, where the user must first choose the object property, and then the source for the update.

### Email Notifications

Using this setting, automatic email notifications can be sent to InPhase users. The user can define a title, header and footer for the email, as well as including details from questions.

The recipients can be selected from Groups, users listed in question answers, and users detailed in object properties.

Edit Stage: Awaiting Review 
×

On Entering This Stage
On Saving This Stage
Form Action Buttons

+
UPDATE FORM

Question	<input type="text" value="Search ..."/>	▼	Source	<input type="text" value="Value"/>	▼	×
----------	---	---	--------	------------------------------------	---	---

+
UPDATE LINKED OBJECT/TASK

Property	<input type="text" value="Incident Approval Status"/>	▼	Source	<input type="text" value="Stage"/>	▼	×
----------	---	---	--------	------------------------------------	---	---

+
EMAIL NOTIFICATIONS


Title	<input type="text"/>	Questions to include	<input type="checkbox"/>	Include Link <input checked="" type="checkbox"/>	×
		<b>Click to select</b>			
Header	<input type="text"/>	Email Source	<input type="text" value="Employees in Group"/>		
		<b>Click to select</b>			
Footer	<input type="text"/>				

Cancel
Delete






Apply

### On Saving Stage

This functions in a similar way to 'On Entering Stage', with the addition of 'rules'. Users can set an update to the Questionnaire, Object or Notifications, based on All, or Any of rules being met.

Match ALL of the following rules 

---

-  Add Rule
-  Add Changed Question Trigger
-  UPDATE FORM
-  UPDATE LINKED OBJECT/TASK
-  EMAIL NOTIFICATIONS



Cancel

Delete

Apply 

## Form Action Buttons

In this section, users can configure the buttons that appear for the user in each stage, and set the actions for those buttons accordingly.

To add a button, click the blue '+' icon. Then set a name, button colour, text colour, and other settings.

The 'Link to Status' option allows the user to set which 'stage' the form will move to if the button is clicked. This allows users to pass the Questionnaire through each of the relevant stages.

On the Workflow map, the lines that represent the links between the stages are coloured the same as the buttons, so the user can see briefly if the buttons are configured correctly.

InPhase would advise using a consistent colour scheme for the buttons (ie: Red to move back a stage, blue to save within the stage, green to progress to the next stage).


Edit Stage: Awaiting Review 



On Entering This Stage   On Saving This Stage   Form Action Buttons

Click a button below to change its settings, or the + button to create a new one. Drag buttons to re-order.

Reject   
 Save as Awaiting Review   
 Being Reviewed   
 +

Form Action Name	<input type="text" value="Reject"/>
Button Colour	<input type="radio" value="red"/>
Button Text Colour	<input type="radio" value="white"/>
Required questions must be answered	<input type="checkbox"/>
User must confirm message	<input type="text"/>
Success Message	<input type="text"/>
Error Message	<input type="text"/>
Link to Status	<input type="text" value="Rejected"/> 





Cancel   
 Delete   
 Apply

## Object Sync

This section allows the user to sync the Questionnaire with the associated object (if one exists). Whenever the Questionnaire is saved, the properties in the object will sync with the details in the form.

This function can be used if changes to a certain question should prompt an update in the associated object, regardless of the 'stage' that the Questionnaire is in.

**UPDATE LINKED OBJECT/TASK**

Property	<input type="text" value="Incident Approval Status"/>	Source	<input type="text" value="Stage"/>	
Property	<input type="text" value="Object Description"/>	Source	<input type="text" value="From Question answer"/> <input type="text" value="Describe what happened"/>	
Property	<input type="text" value="Incident Category"/>	Source	<input type="text" value="From Question answer"/> <input type="text" value="Which things were involved in what went wrong?"/>	
Property	<input type="text" value="Incident Severity"/>	Source	<input type="text" value="From Question answer"/> <input type="text" value="How concerned are you about this incident and its implications?"/>	
Property	<input type="text" value="Incident Type"/>	Source	<input type="text" value="From Question answer"/> <input type="text" value="Type"/>	