Ideagen InPhase 24

Release Notes 24.0.0

August 2024

Commercially confidential

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InPhase 24.0

Breaking Changes

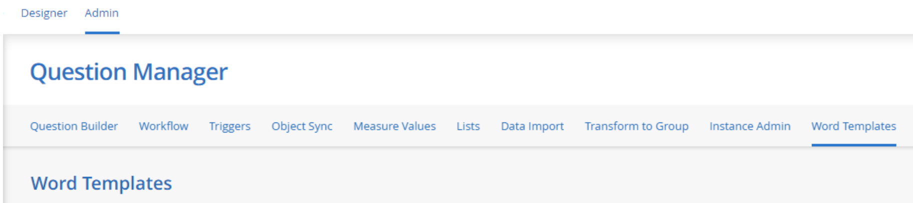
No breaking changes since 23.1.

Template Documents

Word Documents can be uploaded for a Questionnaire to be used as a template with a Questionnaire Instance to produce a Word or PDF document.

Administration

These templates can be configured in Administrator for the Questionnaire:



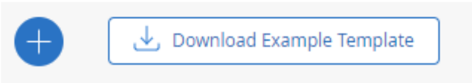
All templates must start with {{#foreach Questionnaire}} and end with {{/foreach Questionnaire}} .

To insert data for the question, the Reporting alias needs to be preceded by **{{** and followed by **}}** e.g. for a question with a reporting alias of Date, the Word template requires {{Date}}

The built in fields can be added to the template using:

Field	Template syntax
Date generated	{{InPhase Generated Date}}
Questionnaire Instance Id	{{InPhase Instance Id}}
Created Date	{{InPhase Created}}
Created By	{{InPhase Created By}}
Updated Date	{{InPhase Updated}}
Updated By	{{InPhase Updated By}}
Stage	{{InPhase Stage}}

An example Word template can be generated and downloaded:



This example template is broken into the Sections, where a section or question is repeating, the foreach syntax is used to iterate through all instances. For each question, the Label and the syntax for including the answer is shown:

{{#foreach Questionnaire}}
Questionnaire Index: {{index}}

Generated Date: {{InPhase Generated Date}}
Questionnaire Id: {{InPhase Instance Id}}
Created Date: {{InPhase Created}}
Created By: {{InPhase Created By}}
Updated Date: {{InPhase Updated}}
Updated By: {{InPhase Updated By}}
InPhase Stage: {{InPhase Stage}}
Section: LFPSE [LFPSE]

Reported Date: {{Date}}
Type: {{Type}}
Describe what happened: {{Description}}
Was a patient involved?: {{Has Injured}}

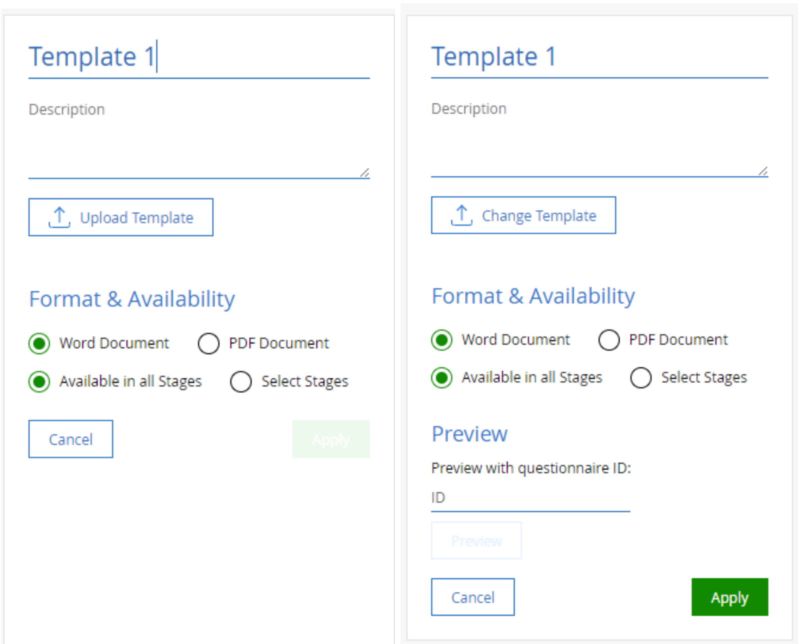
Section: Patient [Patient]
{{#foreach Patient}}
Repeating Section Index: {{index}}
Patient's Date of Birth: {{DateOfBirth}}
Estimate the patient's age: {{AgeBracket}}
What was the patient's age at the time of the event (days)?: {{AgeAtTimeOfIncidentDays}}
What was the clinical outcome for the patient?: {{ClinicalOutcome}}
What is the patient's sex?: {{Gender}}
To what extent was the patient physically harmed (including pain) in this incident?:
{{PhysicalHarm}}
To what extent was the patient psychologically harmed in this incident?:
{{PsychologicalHarm}}
How much did the incident contribute to the outcome for the patient?:
{{StrengthOfAssociation}}
What is the patient's self-identified ethnicity?: {{PatientEthnicity}}
First Name: {{First Name (Patient)}}
Surname: {{Surname (Patient)}}
Hospital Number: {{Hospital Number (Patient)}}
NHS Number: {{NHS Number (Patient)}}
{{/foreach Patient}}

Section: Detection [Detection]

At what point was the incident detected?: {{DetectionPoint}}
Please specify: {{DetectionPointOther}}

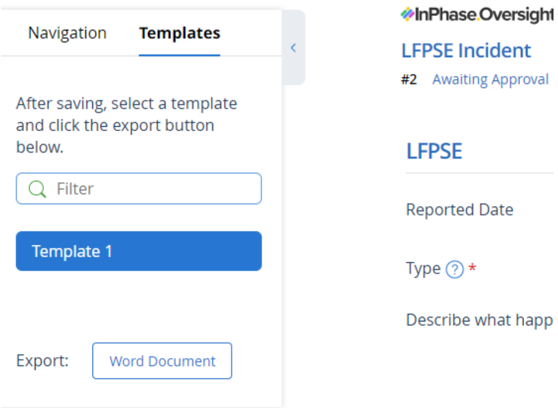
Each template is represented by a card which consists of:

- Name – this is displayed to the end users.
- Description – text used to explain the purpose of the template.
- Upload Template – upload a Word template.
- Change Template – upload a new Word template, overriding the existing template.
- Format – The document type to generate from the Word template.
- Availability – Templates can be made available in all or specific stages.
- Preview – enter an id of an instance of the questionnaire to preview
- Apply – apply the changes to the template locally, but a save to the questionnaire is still required.
- Cancel – undo changes to the template.



Template Usage

End users can generate documents using the left hand navigation panel:



Only templates valid for the current stage are shown and the user can also search by name. A button will appear to generate the document which indicates the format. The document is downloaded to the users device. If the user wants to attach the document to the record, they will need to attach manually as they would with other attachments.

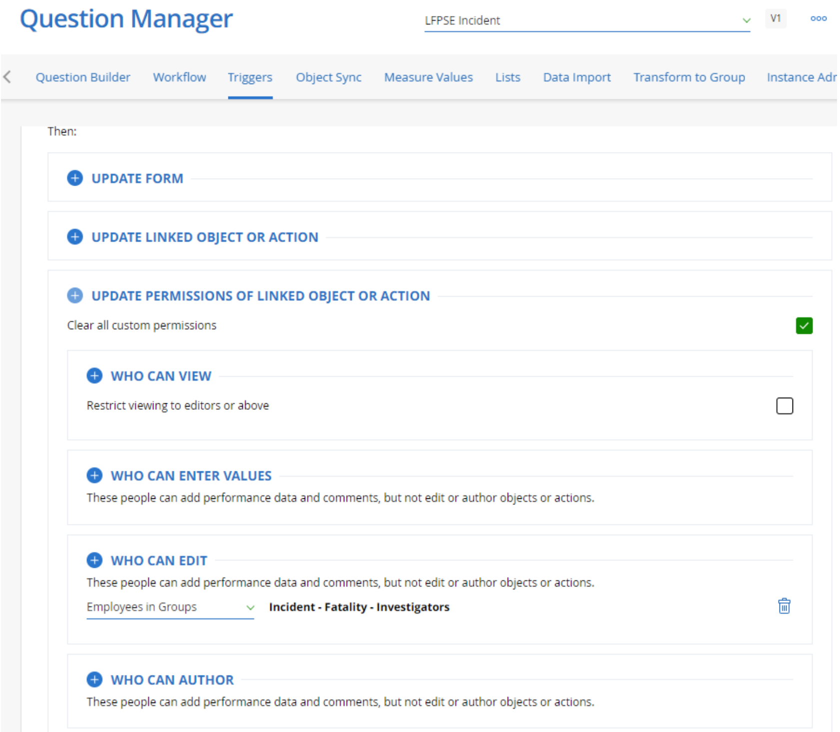
An audit log is generated anytime a user generates a document from a template, which includes the users name, the template name and the Id of the Questionnaire instance.

Question Manager – Triggers setting Permissions

Questionnaire triggers can now set permissions for instances of a questionnaire via the linked Object. This enables the ability to customize the permissions dynamically to ensure correct visibility and edit rights. These permissions flow through to the Live Data connections and opening the Questionnaire Instance.

Trigger Configuration

The permissions are configure on the trigger actions:



Clear all custom permissions provides a clean slate to then configure the permissions.

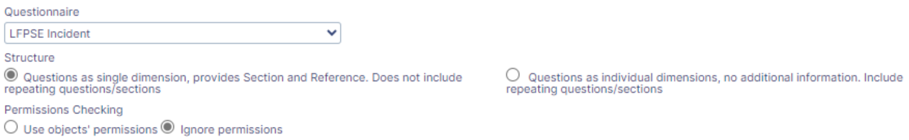
Each level has the permissions of the section above e.g. editors can enter values. The permissions can be set as specific employees, employees from questions, specific groups or groups from questions using the Transform to Group.

Live Connect

A user's view permissions are automatically applied when accessing reports using Live Connects.

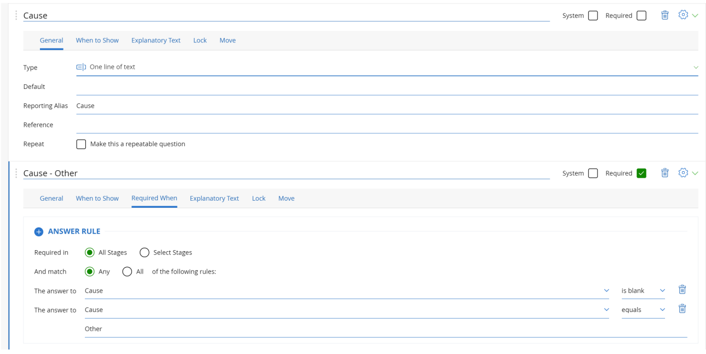
For connections used to report high level data, permission checking can be disabled on the Live Connect. These connections would normally have a combination of:

- preset filters
- limited number of questions in the Questionnaire e.g. no Patient Identifiable Information
- locked to a specific group

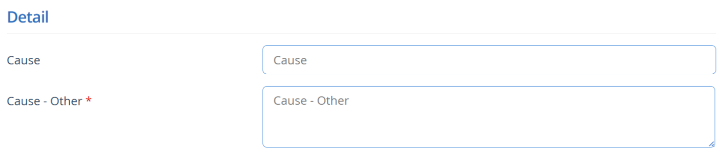


Question Manager - Conditional Required Questions

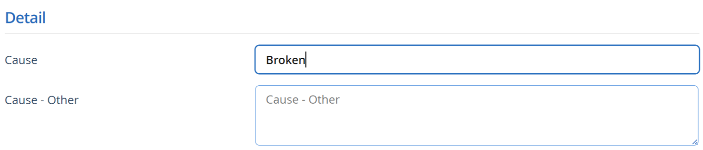
The Required status of a question can be made conditional based on another question. A common use would be where "OTHER" has been selected/entered or no value set:



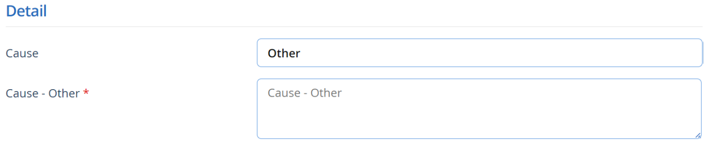
No value in cause makes "Cause – Other" required:



A value in cause makes "Cause – Other" optional:

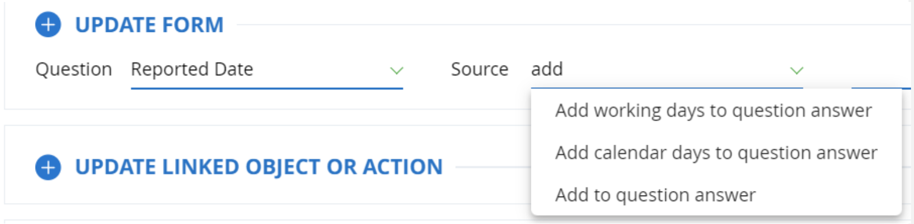


Except where the value is "Other", then "Cause – Other" is required:



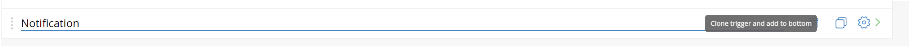
Question Manager – Triggers can now add Calendar days

The option to add Calendar days to a date question is now available:



Question Manager – Triggers can now be duplicated

Triggers can now be duplicated with a click and are added to the bottom of the list of triggers.



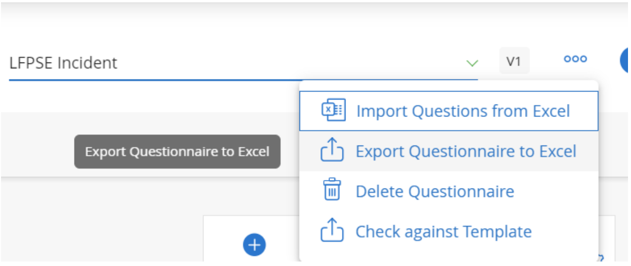
The order of the triggers can be updated by dragging and dropping.

Question Manager – System Lists

Lists populated externally such as the LFPSE look up values cannot be edited by the customer as these lists are required to match the external system.

Question Manager – Export To Excel include conditions

For system administrators to be able to quickly review show/require conditions, the export to excel now includes columns containing the conditions:



E
Section When to Show (Conditions)
Type is any of [Outcome, Incident] OR Was a patient involved? equals "Yes"

E
Section When to Show (Conditions)
Which things were involved in what went wrong? is any of [Medications] OR Which things were involved in what went wrong? is any of [Devices]

O	P
Question When to Show (Stages)	Question When to Show (Conditions)
	Which of the following processes were involved in what went wrong? is any of [Other]
	Was a device used to give medication in this instance? is any of [Yes]
	How was medication involved in what went wrong? is any of [Too little medication was prescribed/dispensed/administered]

NOTE: This excel format is for reference purposes only and cannot be used as a template import.

Questionnaires – Event based use Object locking

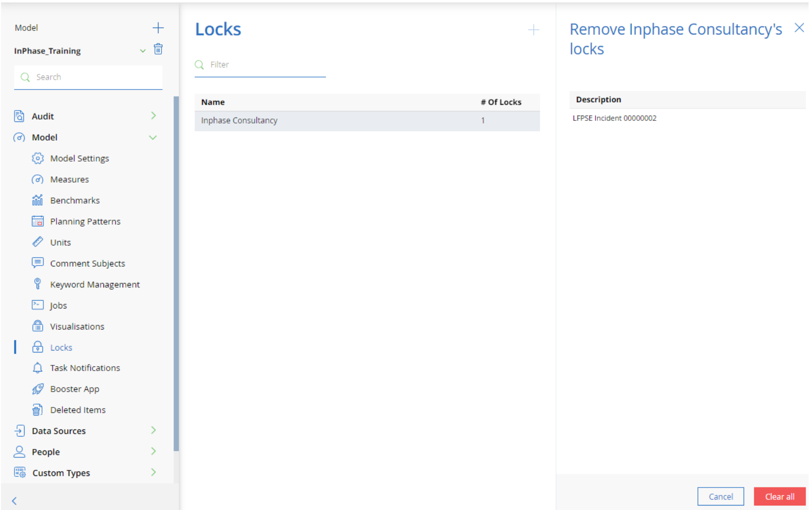
Whenever a user accesses an Event type questionnaire instance in edit mode, a lock on the linked Object is made. If there is already a lock on the Object, a message will tell the user who has the lock. Closing the page or widget with a questionnaire instance in edit mode will remove the lock.

It is possible that a user may retain a lock longer than expected due to:

- leaving the questionnaire instance open in edit mode
- closing the browser or widget while not connected to the internet
- the browser closing abnormally

To remove the lock either:

- the user with the lock can open and close the questionnaire instance
- an administrator can clear all locks for a user via Administrator:



Fixes

LFPSE submission

The LFPSE integration no longer requires a trigger to fire.

Question Manager - Conditional values with double spaces

Corrected issue with text including double spaces not being selected on load

Audit Deploy - Name truncation

Truncation of the Name on deploy now ensures uniqueness.

Audit Deploy - Aggregated Object's Normalised Count

Aggregate object's normalised count now comes from children instead of recalculated at the level.

Questionnaire - Accessibility

"More" button accessibility for focus state improved.

Audits

Audits' full date and local time now shown. Default slicers changed to improve loading time.

Change Log

24.0.0

Question Manager

- Required Questions
  - Required questions can be made conditional, so only required if match condition.
- Conditionals
  - Corrected issue with text including double spaces not being selected on load
- Triggers
  - Questionnaire Add Calendar days
  - Duplicate a trigger
- Templates
  - Ability to upload Word Templates to generate Word/PDF from a Questionnaire
- Data Import
  - Can now import against the questionnaire instance id.
  - Can now import the name of the Object to link the Audit/Survey
- Lists
  - LFPSE lists are marked as System list to prevent local updates

Questionnaire Live Connects

- Current user's access rights on linked Objects checked on all live connect. This can be turned off for the connection

Questionnaire – Locking

- Locking of Event based questionnaires, if a lock cannot be obtained, the user cannot edit the record.

Custom Objects

- Ability to set the default permissions on create and also apply to existing instances.

Audit Deploy

- Aggregate object's normalised count now comes from children instead of recalculated at the level.

- Now handles truncation of names to ensure unique

Fonts

- Font unavailable across all devices removed from available fonts
- Gilroy font added

LFPSE

- LFPSE V6 – Awaiting NHS England approval
- Submissions no longer require a trigger to fire

Trends

- Error message on save now displaying as needed
- Drill through within report now working

Performance

- Improved performance of load parent Task information
- Task bulk loading limited to prevent time outs

Bulk Group

- Fixed issue where bulk import of group could clear members from the group.

Automation

- Ability to upload the Employee CSV to add/update employees
- Ability to upload the Group CSV to add/update groups

23.3.0

Data Transforms

- These can be directly updating in Administrator

Patient Demographics

- HL7 Connector
- Logged on OR SSO Access

Live Trends

- Cell Alignment

Questionnaire via SSO

- Capture user by email

Sunburst

- In designer, saving a Sunburst will keep its name and title instead of just using title.
- Measures using Absolute Variance for tolerance now show value in Tool tip.

Performance Chart

- Where a measure starts later than the chart range and extra series are added, extra series are positioned correctly.

Trends – Conditional Formatting

- Where a Performance Scheme is used in its opposite direction (Smaller is Better/Bigger is Better), the first render is now correct. Was working correctly only after a reload of the page.

Import – Custom Assessment Year

- A measure's Customer Assessment Year can now be imported.

Questionnaire - Workflow

- Conditions/actions based on deleted questions no longer prevent the rest of the actions from working.

Scorecards – Mobile/Small screens

- Improved rendering of Scorecards on smaller screens.

Organisation Chart

- When click “Show Full”, the links now render correctly.

23.2.0

Question Manager

- New Question Type – Org Unit
- New Question Type – Working Days Between
- New Question Type – Calendar Days Between
- Workflow Permissions – restrict buttons to Groups.
- Linked Object Name/Org Unit – For Audits to show the details of the linked Object.
- Move Audit to a different Object.

Scorecard

- Sparkline now top aligned
- Comment Icon now filters to the selected Subject correctly.

Trends

- Alignment options
- Export to CSV now auto closes the dialog.

Live Connect

- Performance of Last/First word improved.

Administrator

- Employee filtering now works with full name. Previously included space for empty initial.

23.1.0

Question Manager

- Updating large Questionnaire Lists is significantly faster.
- Deleting an instance of an Audit will cause a recalculation using remaining Audits.
- Objects linked to a Questionnaire Instance cannot be deleted until all linked instances are deleted. For Event/LFPSE deleting the Instance will delete the Object automatically.
- If a Questionnaire is in an invalid stage, it can now be forced to move to any valid Stage.
- New Question Type "Bidirectional (other)" that shows and creates links to and from other objects.
- New Triggers tab to allow editing all triggers in one place rather than by Workflow stage.

LFPSE

- Where an LFPSE record failed to upload to NHS England due to error connecting or within the NHS England API, resaving will now clear this error message.

Questionnaires

- Issue resolved with Cascading choice questions in a repeating group (not repeating sections) showing as disabled on load.
- History button is now available in the Measure Details pop up.
- Images resized for thumbnails, full size on click.

Questionnaire Live Connect

- Option to use the Reporting Alias as the underlying name in reports to assist with merging multiple Live Connects in a single report. Using this option means that changing the Reporting Alias can invalid that question in the Live Connect and the Trends reports.

Questionnaire Export

- On Questionnaire Export it has been identified that on some instances, the Section GUID was duplicated as part of the Id e.g. "[GUID]_[GUID]_[repeat Id]". This has been corrected to "[GUID]_[repeat Id]".

Administrator

- Portals and Pages are now soft deleted. Administrator can be used to restore of delete permanently.

User Profile

- Active Date Range can be set on the User profile to automatically apply an active filter to all reports.

Performance

- Performance of large reports showing Ancestor Object data massively improved. Improvements may also affect other large report scenarios.

23.0.0

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 if no questions were added to the section, the section would have been automatically hidden.
- 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.

Commented [HL1]: I don't know what the end of this is supposed to be

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.

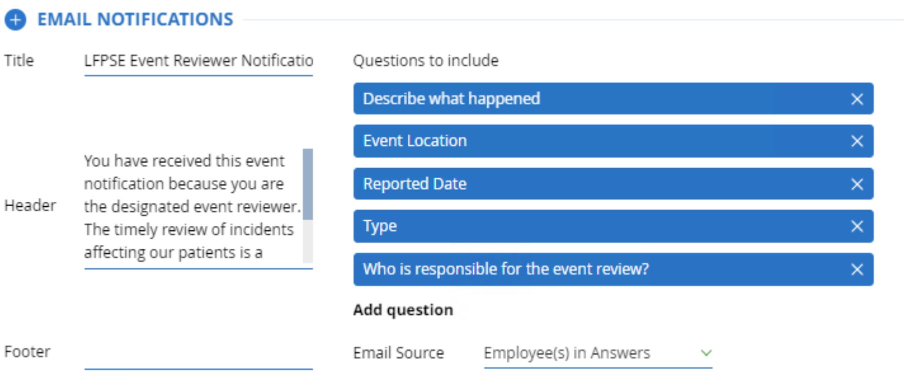
Admin – Question Manager

- 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.



- 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.