

InPhase 23

Release Notes

23.1.0

February 2024

Commercially Confidential

Contents

INPHASE 23.1	3
Breaking Changes	3
Important Changes	3
Bidirectional “Other” linking	4
Triggers	5
Portal and Page Delete	7
Active Date Range.....	8
Other Enhancements.....	9
LFPSE.....	9
Question Manager.....	9
Questionnaires.....	9
Questionnaire Live Connect	9
Reporting	9
INPHASE 23.0.0	10
Audit Deployment.....	10
First Time Deploy.....	11
Existing Deployment.....	16
Task Attachments	18
Patient Demographics	22
Named Anchors	24
Change Log.....	27
23.1.0	27
23.0.0	29

InPhase 23.1

Breaking Changes

On Questionnaire Export, a fix has been applied for the Section Id. 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]”.

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

If any entity has custom permissions, users with the “Performance Modeller” role will no longer have Author rights. These users will need to be added to the permission of the entity either directly or through a group. If an entity does not have custom permissions set, they will still have Author rights.

Important Changes

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

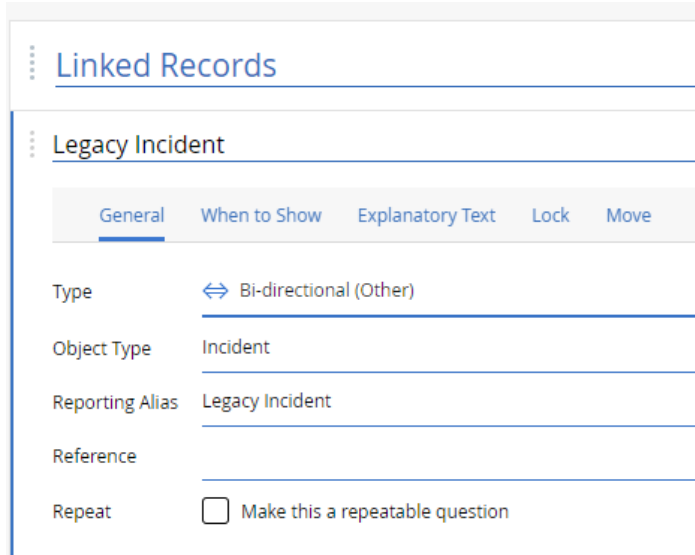
Incognito Access will in a future release have File Upload and Employee search prevented by default, but there is no forced change in this release. This release does support an InPhase configurable ability to:

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

Bidirectional “Other” linking

Ability to link Objects in both directions using “Other” links. Part Of links are still single direction due to aggregation of data.

Within the Question Manager, the new option to show links either way and create new bi-directional links (one each way) is shown below:



The screenshot shows a web interface for configuring a link. At the top, there is a section titled "Linked Records" with a dropdown menu. Below this, there is a section titled "Legacy Incident" with a dropdown menu. Underneath, there are five tabs: "General", "When to Show", "Explanatory Text", "Lock", and "Move". The "General" tab is selected. The form contains the following fields:

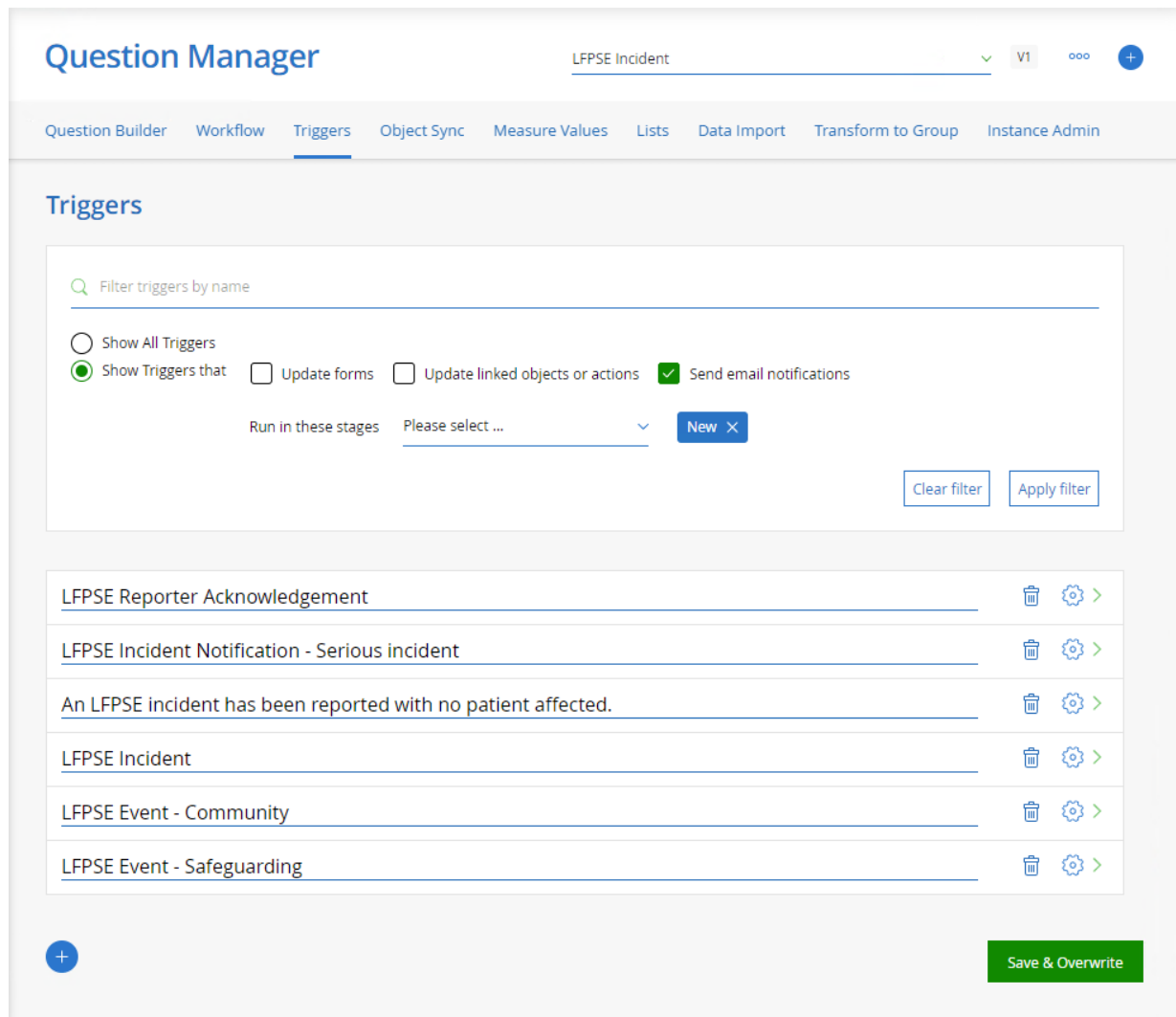
Type	↔ Bi-directional (Other)
Object Type	Incident
Reporting Alias	Legacy Incident
Reference	
Repeat	<input type="checkbox"/> Make this a repeatable question

Triggers

The 'On Saving This Stage' tab has been removed from the individual Workflow stage dialogs.

All 'on save' triggers can now be found in a Triggers tab in Question Manager. Duplication can be reduced as the same trigger can now be used across multiple stages.

Using the filter panel, the displayed list of triggers can be filtered by name, the actions they perform and the stage in which they run.





















The screenshot shows the 'Question Manager' interface for 'LFPSE Incident' (version V1). The 'Triggers' tab is active, displaying a filter panel and a list of triggers.

Filter Panel:

- Search: Filter triggers by name
- Radio buttons: Show All Triggers, Show Triggers that
- Checkboxes: Update forms, Update linked objects or actions, Send email notifications
- Dropdown: Run in these stages: Please select ... (with a 'New' button)
- Buttons: Clear filter, Apply filter

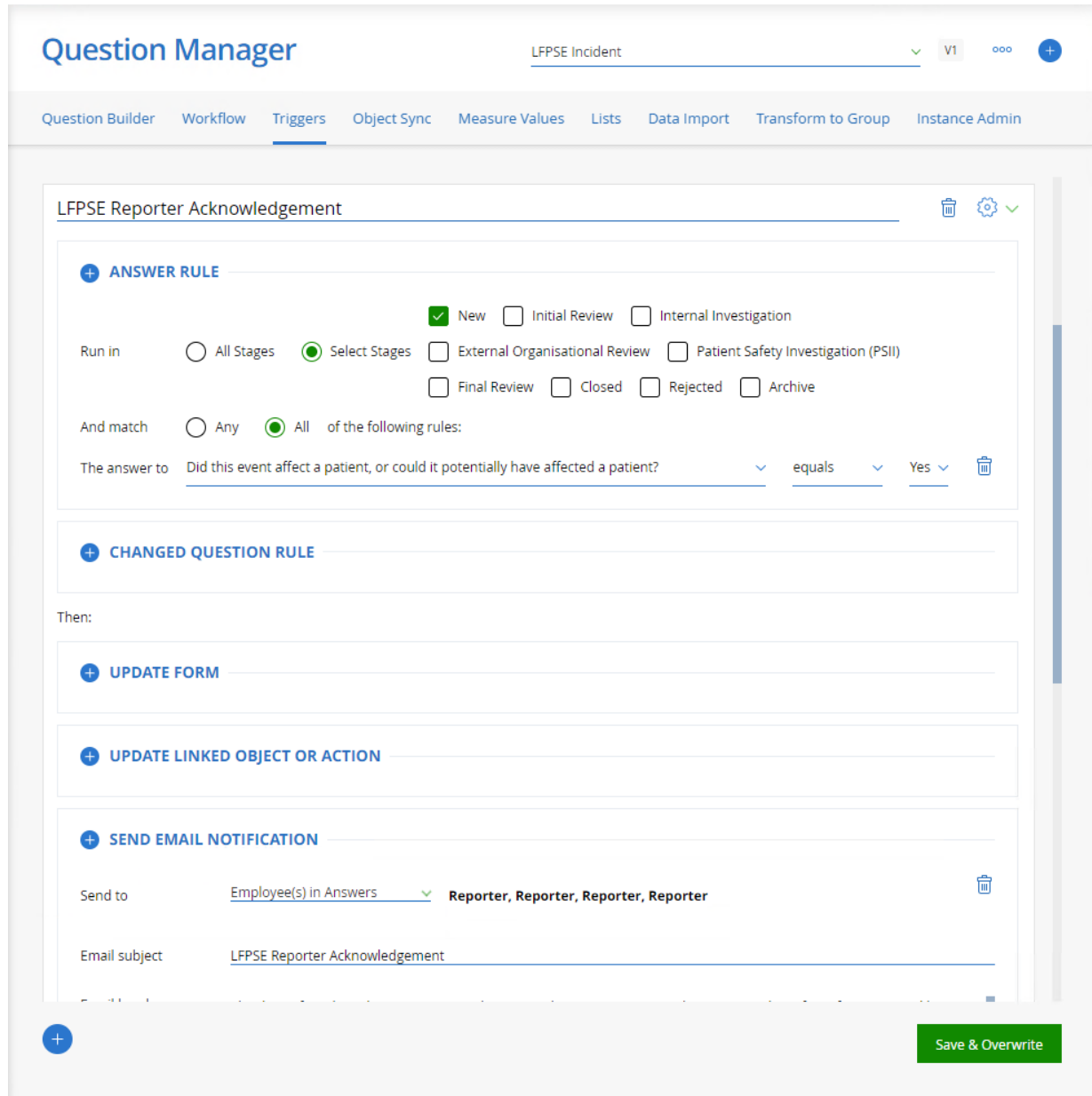
Triggers List:

LFPSE Reporter Acknowledgement	  
LFPSE Incident Notification - Serious incident	  
An LFPSE incident has been reported with no patient affected.	  
LFPSE Incident	  
LFPSE Event - Community	  
LFPSE Event - Safeguarding	  

Bottom of the interface includes a '+' button on the left and a 'Save & Overwrite' button on the right.

Each trigger has a label that is shown in the notification log to help identify the trigger associated with an event. Existing triggers will use a one-time generated name that should be updated to reflect the purpose.

Additional triggers can be created with the plus button.



The screenshot displays the 'Question Manager' interface for a 'LFPSE Incident'. The 'Triggers' tab is active, showing a configuration for a trigger named 'LFPSE Reporter Acknowledgement'. The configuration includes an 'ANSWER RULE' section with the following settings:

- Run in:** All Stages, Select Stages
- And match:** Any, All of the following rules:
- Selected Stages:** New, Initial Review, Internal Investigation, External Organisational Review, Patient Safety Investigation (PSII), Final Review, Closed, Rejected, Archive
- Condition:** The answer to 'Did this event affect a patient, or could it potentially have affected a patient?' equals 'Yes'

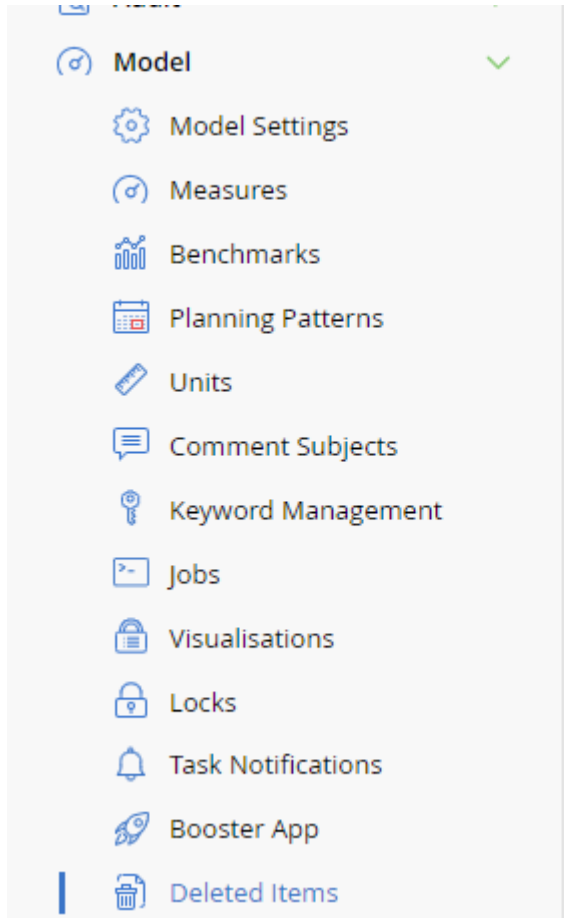
Below the 'ANSWER RULE' section, there are three 'Then:' actions:

- UPDATE FORM**
- UPDATE LINKED OBJECT OR ACTION**
- SEND EMAIL NOTIFICATION** with the following details:
 - Send to:** Employee(s) in Answers, Reporter, Reporter, Reporter, Reporter
 - Email subject:** LFPSE Reporter Acknowledgement

A plus button is visible at the bottom left, and a 'Save & Overwrite' button is at the bottom right.

Portal and Page Delete

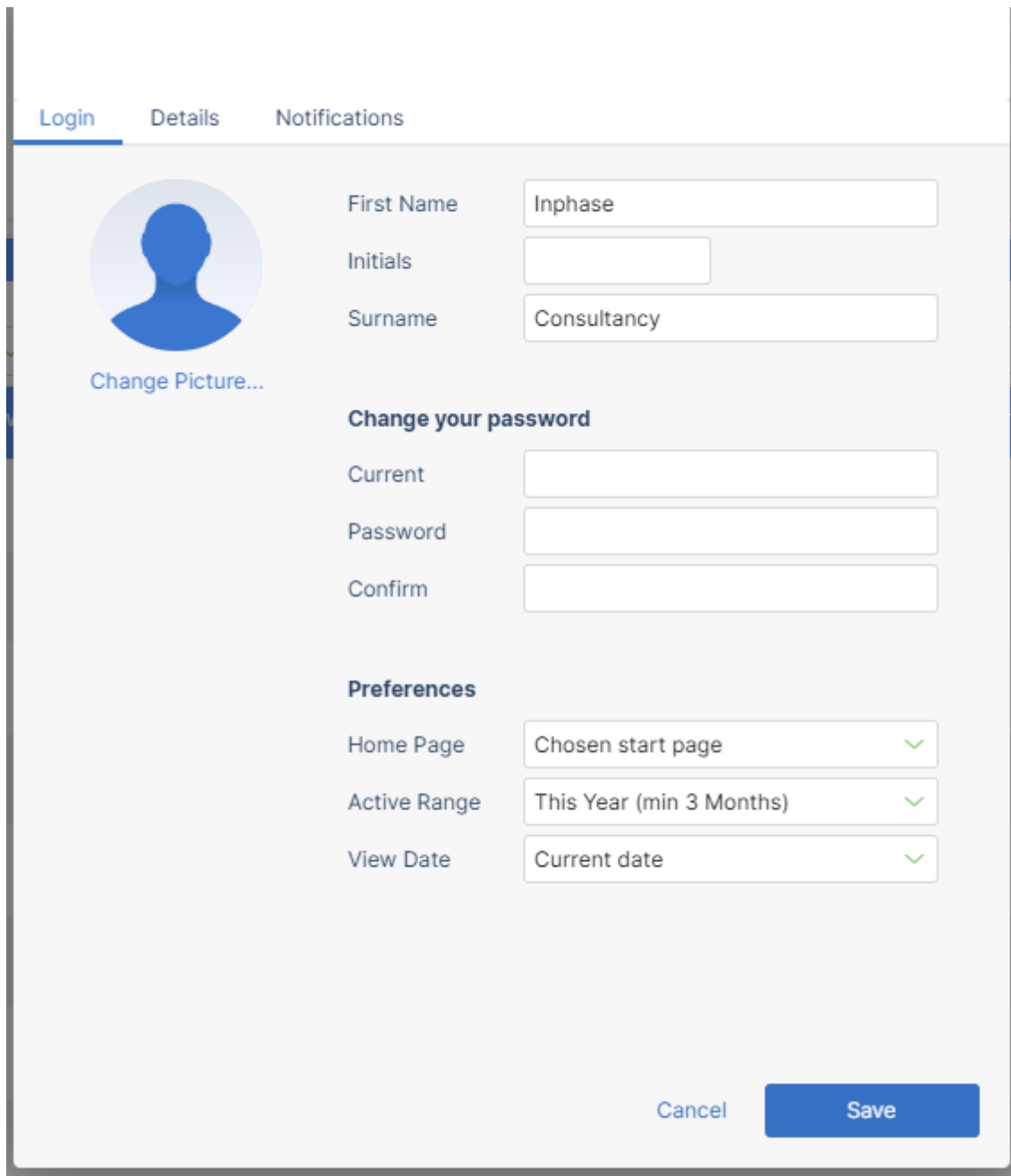
Portals and Pages are no longer permanently deleted. When deleted, they will appear in "Deleted Items":



Deleted items can be permanently deleted or restored.

Active Date Range

Ability to set your Active Date Range. This affects reports by filtering out Objects, Measures and Tasks that are not active in the Date Range based on your view date. New options of “This Year (min 3 months)” and “Last/This Financial Year (min 3 Months)” will include the next 3 months to ensure that at Year End, entities that are about to start in the new year are visible.



The image shows a user profile settings form with the following sections:

- Navigation:** Login, Details, Notifications
- Profile:** A blue silhouette icon with the text "Change Picture..." below it.
- Personal Information:**
 - First Name:
 - Initials:
 - Surname:
- Change your password:**
 - Current:
 - Password:
 - Confirm:
- Preferences:**
 - Home Page:
 - Active Range:
 - View Date:
- Buttons:** Cancel, Save

Other Enhancements

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.

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.

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.

Reporting

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

InPhase 23.0.0

Audit Deployment

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

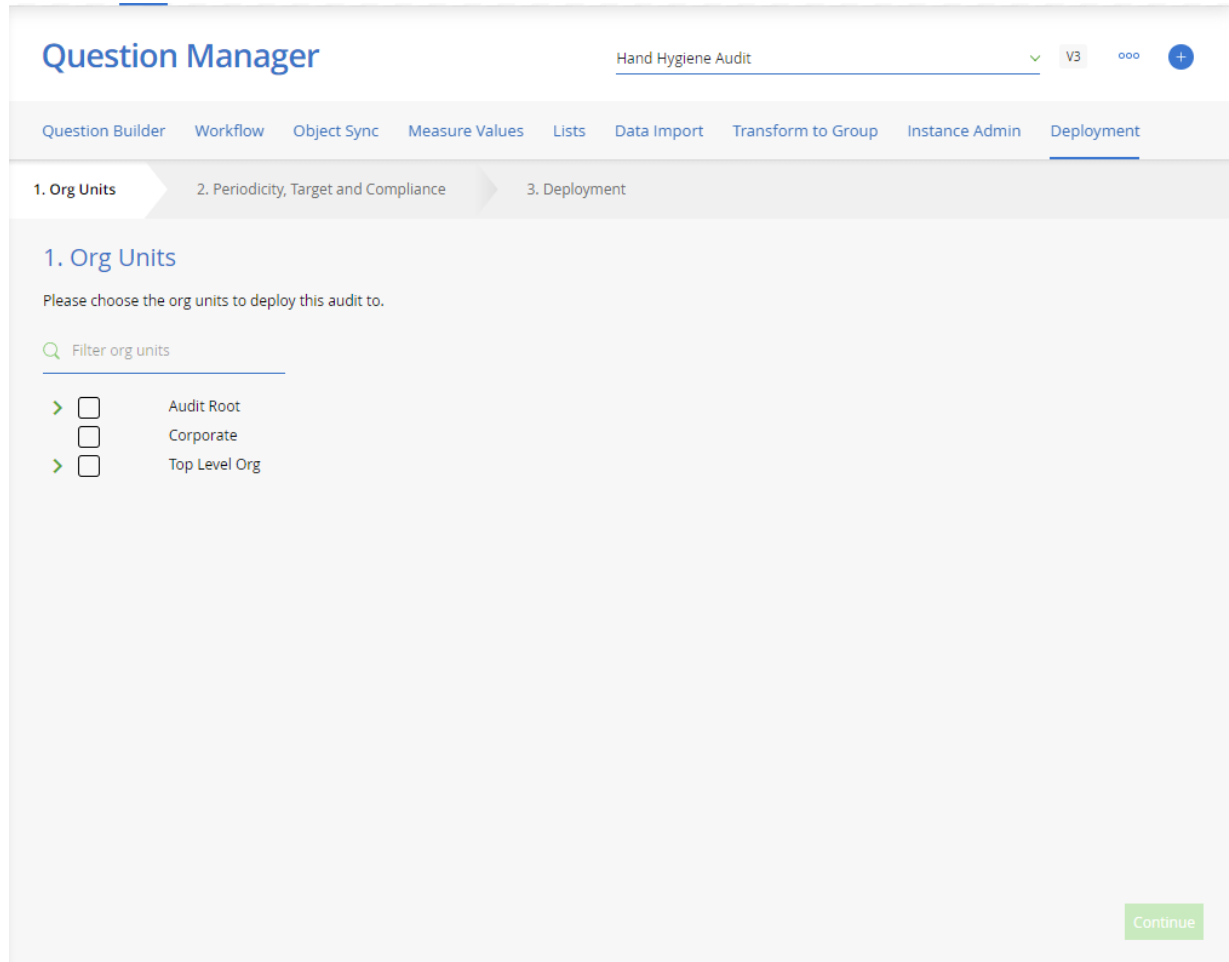
- **Audit Inspection (#AI)**
This object type is used to capture individual Audits within an Organisational Unit.
- **Audits Summary (#AG)**
This object type is used to summarise/aggregate the data from multiple organisational units and provides the ability to report at different levels within your organisational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

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

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

First Time Deploy

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



The screenshot shows the 'Question Manager' interface for a 'Hand Hygiene Audit'. The 'Deployment' tab is selected in the top navigation bar. Below the navigation bar, there are three steps: '1. Org Units', '2. Periodicity, Target and Compliance', and '3. Deployment'. The '1. Org Units' step is active, and the instruction reads: 'Please choose the org units to deploy this audit to.' Below this, there is a search bar labeled 'Filter org units' and a list of three org units: 'Audit Root', 'Corporate', and 'Top Level Org'. Each org unit has a green chevron icon to its left and an unchecked checkbox to its right. A green 'Continue' button is located in the bottom right corner of the form.

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

1. Org Units

Please choose the org units to deploy this audit to.

Filter org units

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

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

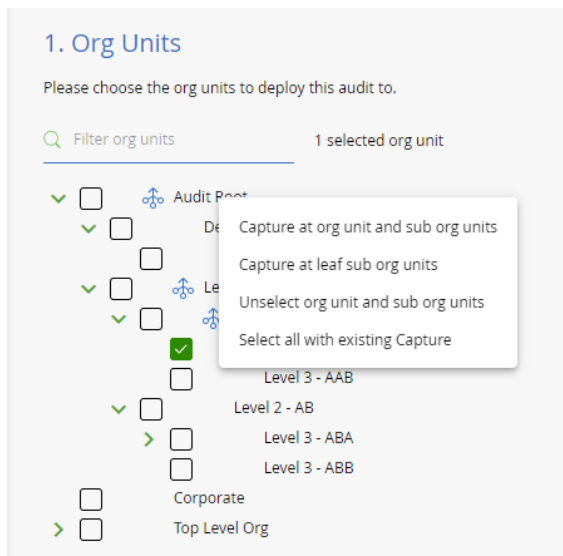
1. Org Units

Please choose the org units to deploy this audit to.

Filter org units 1 selected org unit

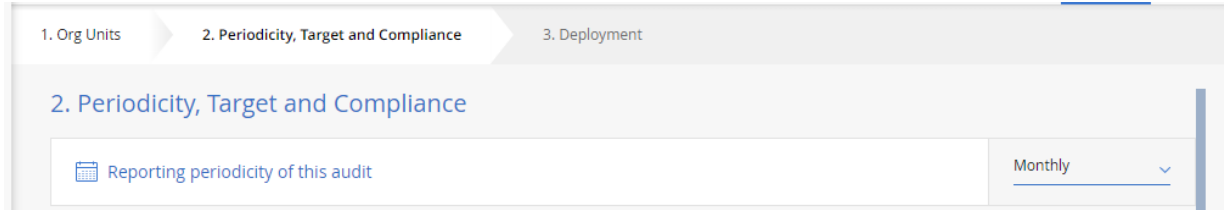
- Audit Root
 - Dept2
 - Dept3
 - Level 1 - A
 - Level 2 - AA
 - Level 3 - AAA
 - Level 3 - AAB
 - Level 2 - AB
 - Level 3 - ABA
 - Level 3 - ABB
- Corporate
- Top Level Org

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



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

Clicking continue will progress to the settings for the deployment:



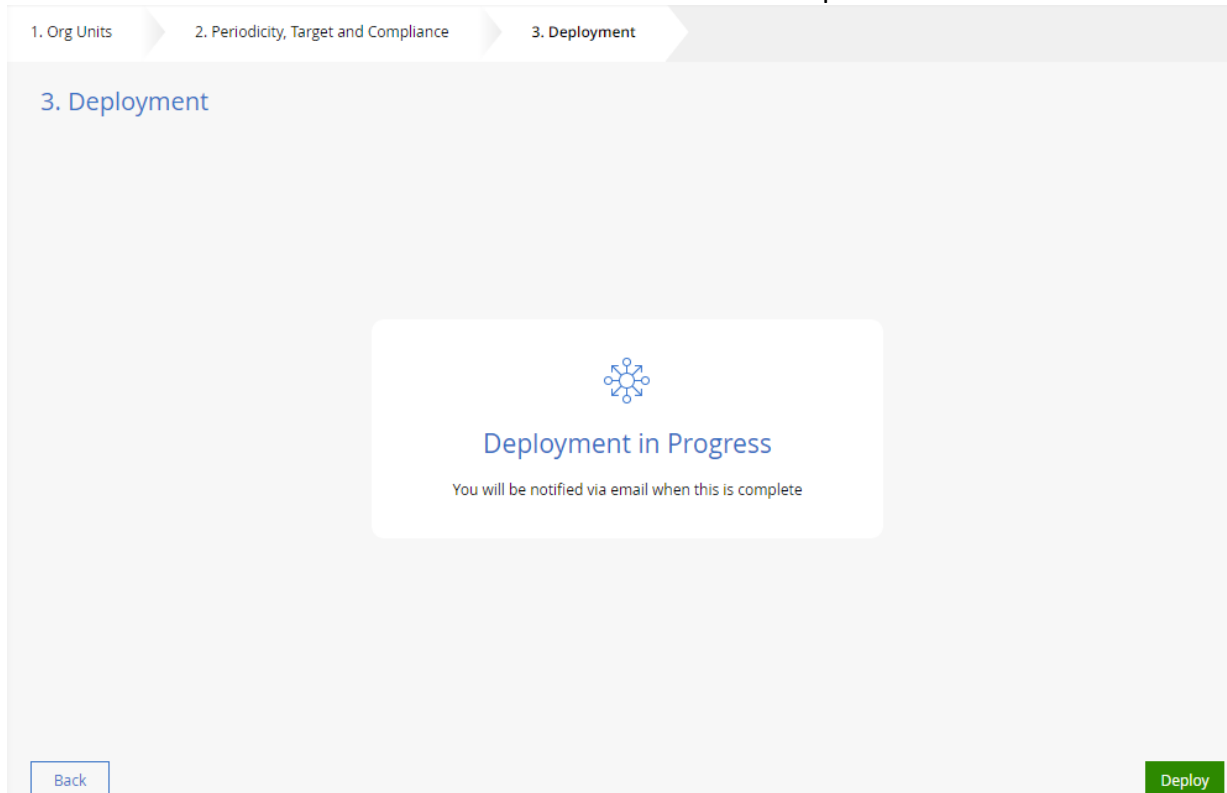
You can select:

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

- Accumulation Type
 - Latest – This is used for Audits where only the latest count. Often this will be a single Audit per period with the ability to redo the Audit in that period if needed.
 - Average – This is used where multiple Audits are required and each Audit counts.
 - Sum
 - Minimum
 - Maximum
- Percentage compliance measure from the Target of 100
- Override Existing
 - Existing deployed Audit Inspection object will only be updated with new settings if this is checked.


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

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



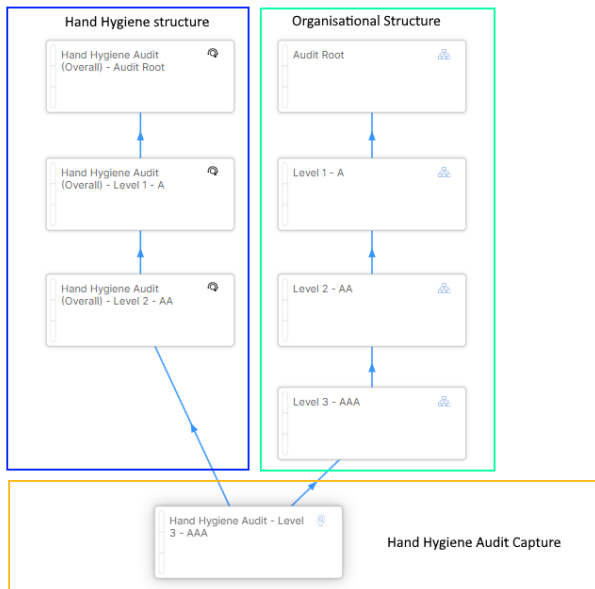
1. Org Units 2. Periodicity, Target and Compliance 3. Deployment

3. Deployment


Deployment in Progress
You will be notified via email when this is complete

[Back](#) [Deploy](#)

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



Existing Deployment

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

1. Org Units

Please choose the org units to deploy this audit to.

Filter org units

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

1. Org Units

Please choose the org units to deploy this audit to.

Filter org units





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

Capture object has already been deployed

1. Org Units

Please choose the org units to deploy this audit to.

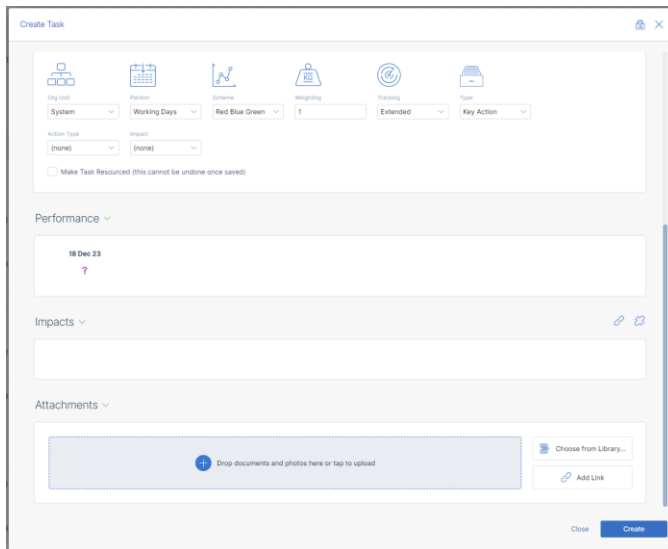
Filter org units

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

Task Attachments

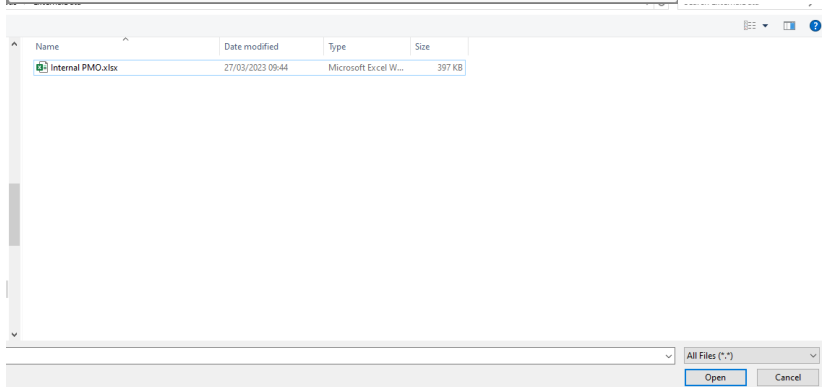
InPhase now supports file attachments and links on Tasks. Using an interface consistent with Questionnaires, the user can attach existing files, upload new or add links to URLs.

Adding a document:

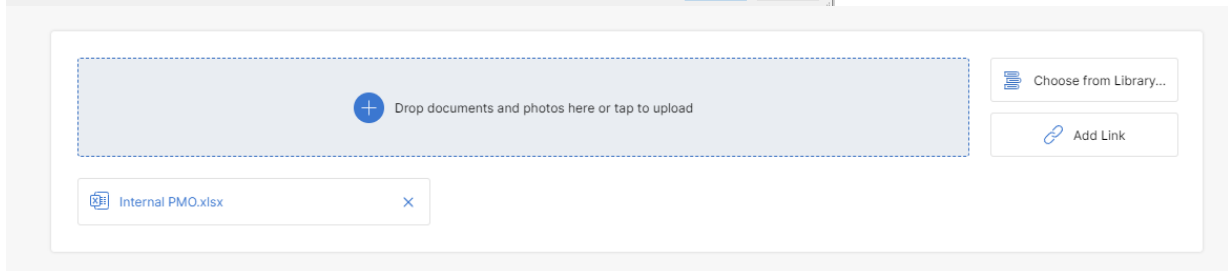


The 'Create Task' form is shown with the following details:

- Task Info:** Organization: System; Period: Working Days; Scenario: Red Blue Green; Quantity: 1; Priority: Extended; Type: Key Action.
- Action Type:** Impact (phone).
- Performance:** 18 Dec 23.
- Impacts:** Empty field with link icons.
- Attachments:** Drop zone with text "Drop documents and photos here or tap to upload", "Choose from Library..." button, and "Add Link" button.



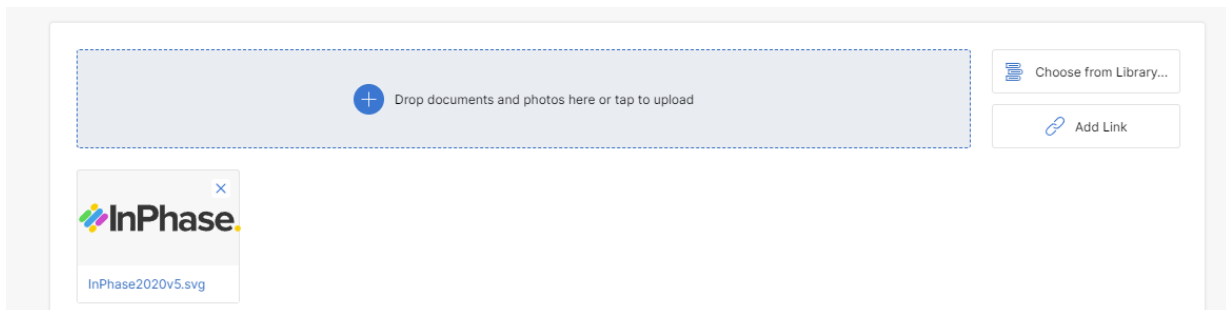
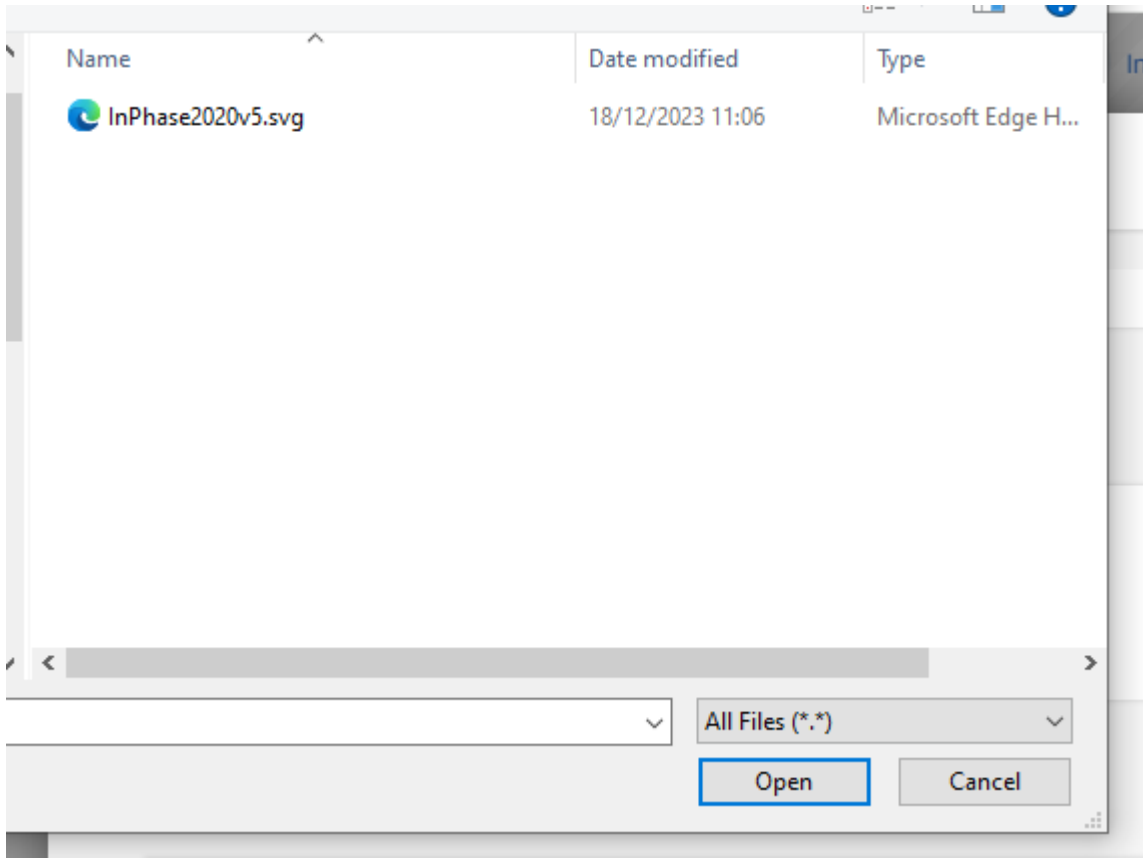
Name	Date modified	Type	Size
Internal PMO.xlsx	27/03/2023 09:44	Microsoft Excel W...	397 KB



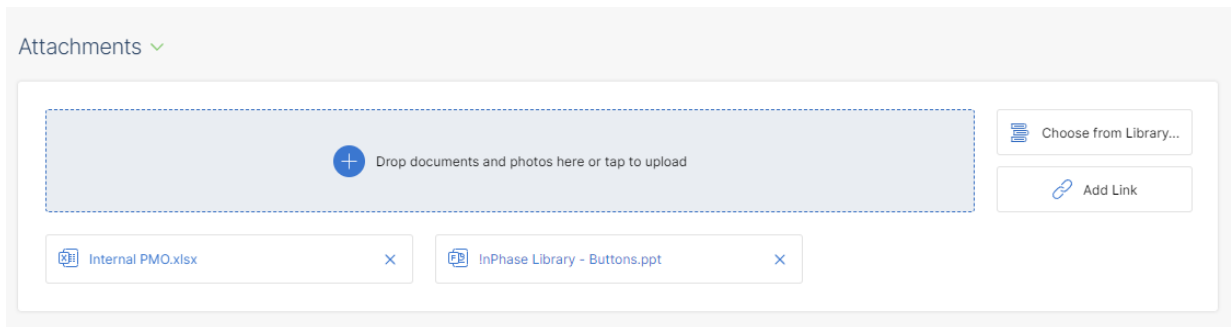
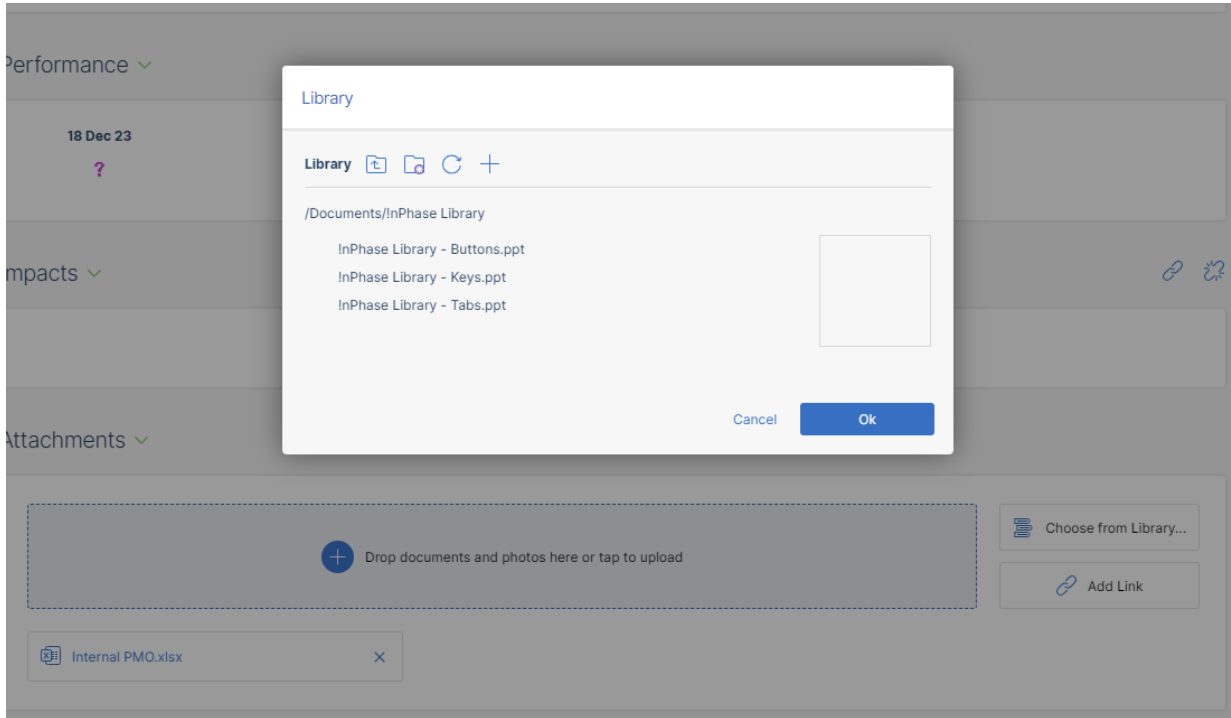
The attachment interface includes:

- A drop zone with a plus icon and the text "Drop documents and photos here or tap to upload".
- A list of attached files: "Internal PMO.xlsx" with a close button.
- Buttons for "Choose from Library..." and "Add Link".

Adding an Image:





Adding from the library:




Adding a Link:

attachments ▾

 Drop documents and photos here or tap to upload


 Internal PMO.xlsx ×


 InPhase Library - Buttons.ppt ×

Description

URL

Https ▾

 Choose from Library...

 Add Link

Patient Demographics

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

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

Example questionnaire using Azure SQL Database:

Affected Patient

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



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

Patient Search

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


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

Patient Search

Criteria	1 Results
<p>InPhase Consultant <input checked="" type="checkbox"/></p> <p> 9999999999  09 Mar 1952</p> <p>Hospital Id 654321</p> <p>Ward InPhase Ward</p> <p>Most recent Team InPhase Ward</p> <p>Gender Male</p>	

The Patient details are then updated in the questionnaire.

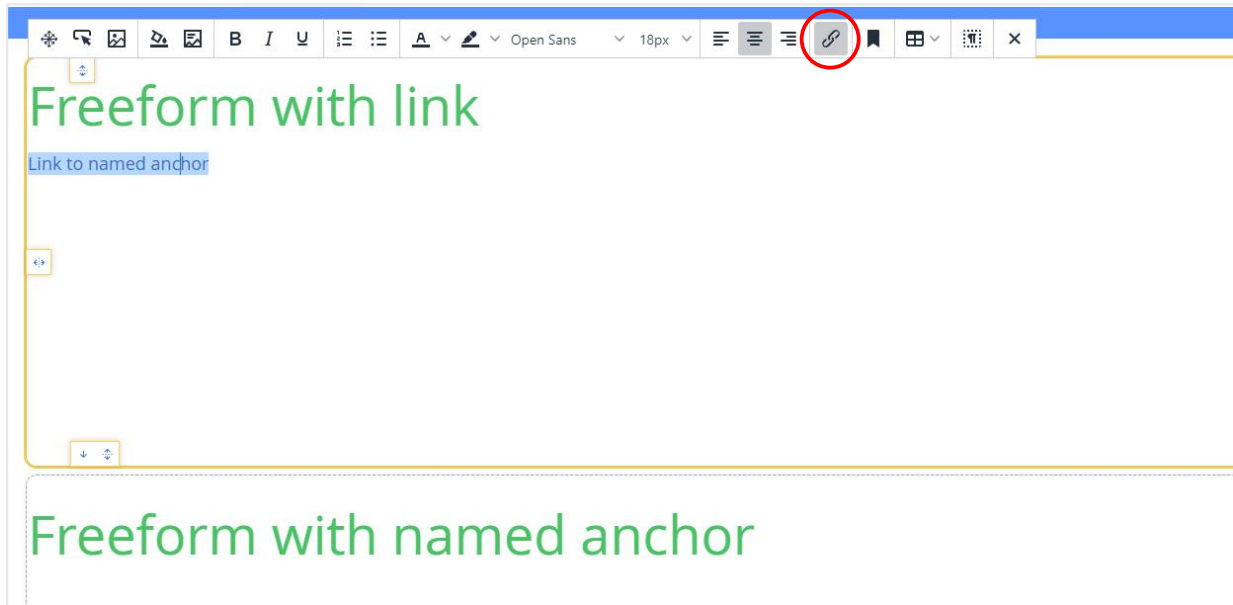
Affected Patient

NHS Number	<input type="text" value="9999999999"/>	<input type="button" value="Search"/>
	<input type="text" value="Or search for a patient manually..."/>	
Hospital Number	<input type="text" value="654321"/>	<input type="button" value="Search"/>
	<input type="text" value="Or search for a patient manually..."/>	
First Name	<input type="text" value="InPhase"/>	
Surname	<input type="text" value="Consultant"/>	
Date Of Birth	<input type="text" value="09/03/1952"/>	

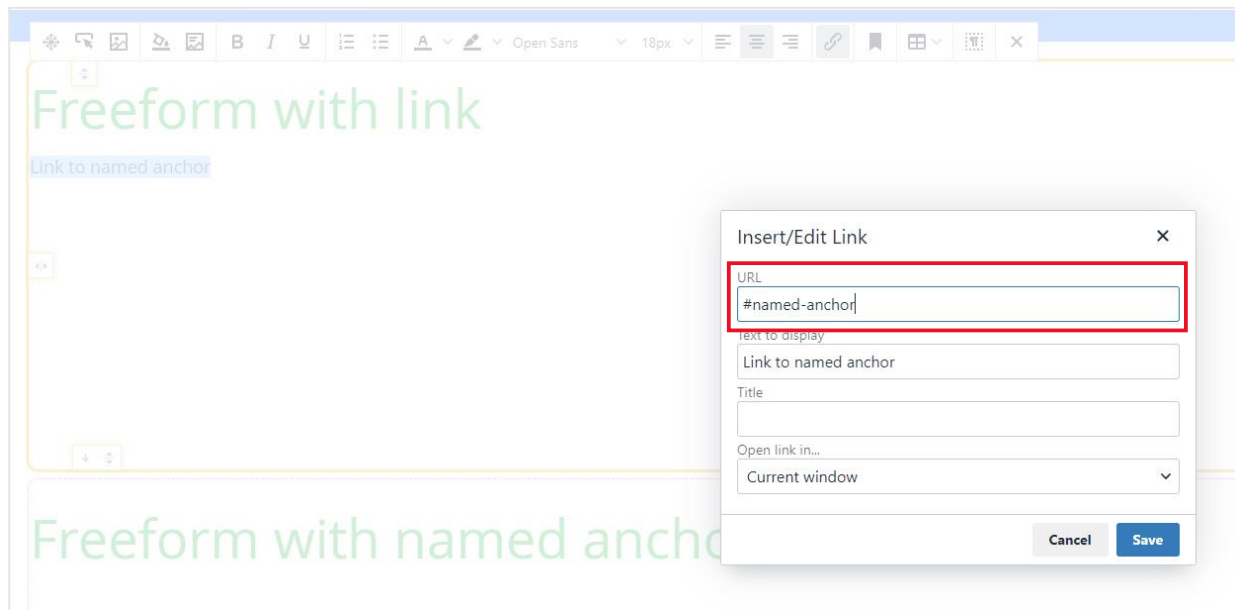
Named Anchors

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

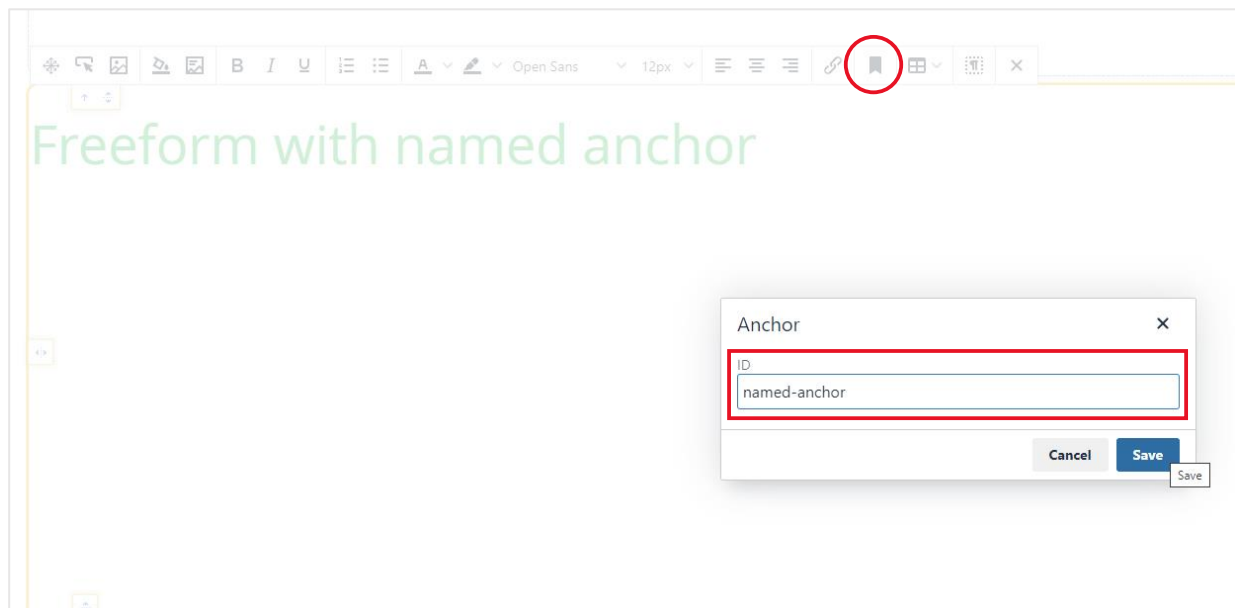
Select some text in the first Freeform, and click on the link icon:



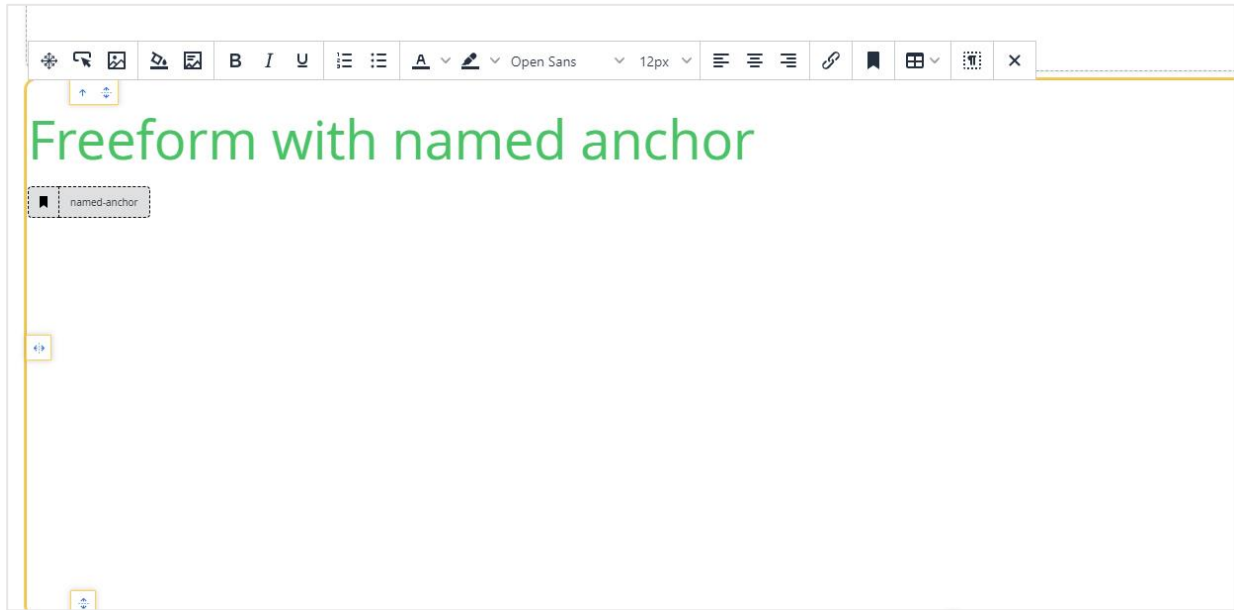
Next, type a hash (#) followed by what you want to call the link in the URL box of the dialog. Copy this text to the clipboard, excluding the hash, and click **Save**.



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



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



Change Log

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 or 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.

Questionnaire Export

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

Questionnaire Reports

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

Audit Questionnaire Picker

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

Linked Widgets

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

UI

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

Performance

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

Admin - Employee

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

Admin – Visualisation

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

Admin – Question Manager

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

Incognito Access – InPhase Configurable

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

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

+ EMAIL NOTIFICATIONS

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

- 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.