

InPhase 21

Release Notes

July 2021
Commercially Confidential

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InPhase 21 Overview

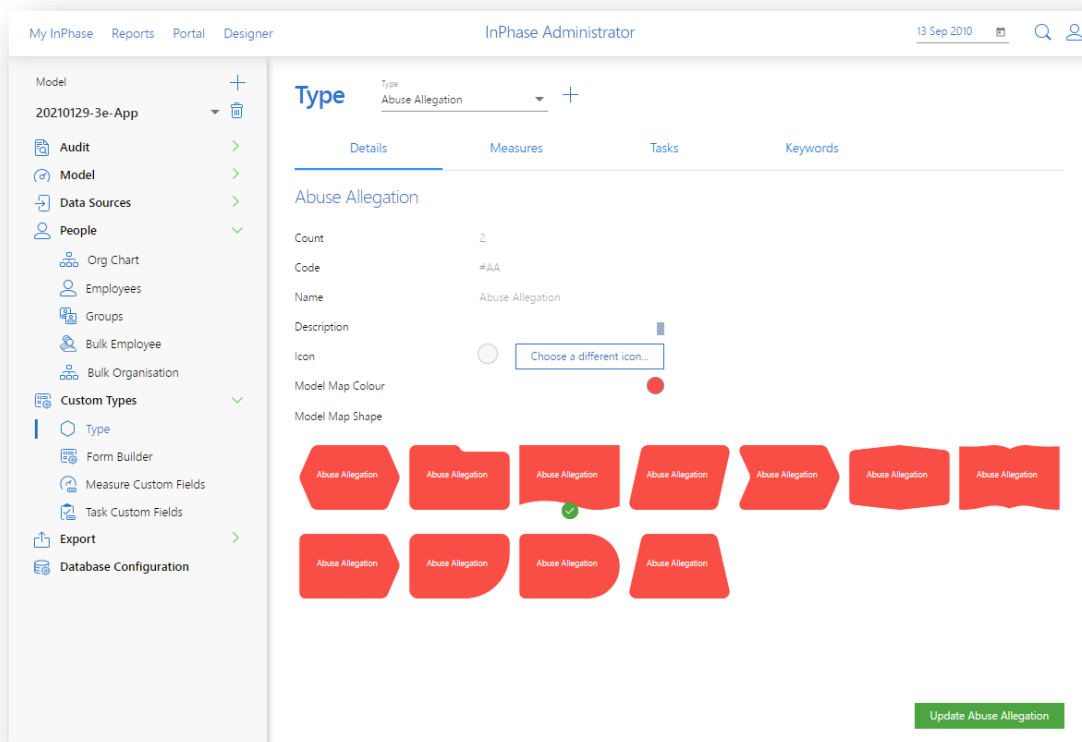
InPhase 21 marks a shift from version number release (this would have been v18) to year naming release.

InPhase 21 has three components Enterprise, Designer and Admin. All these now operate fully in modern browsers only (Internet Explorer is no longer supported).

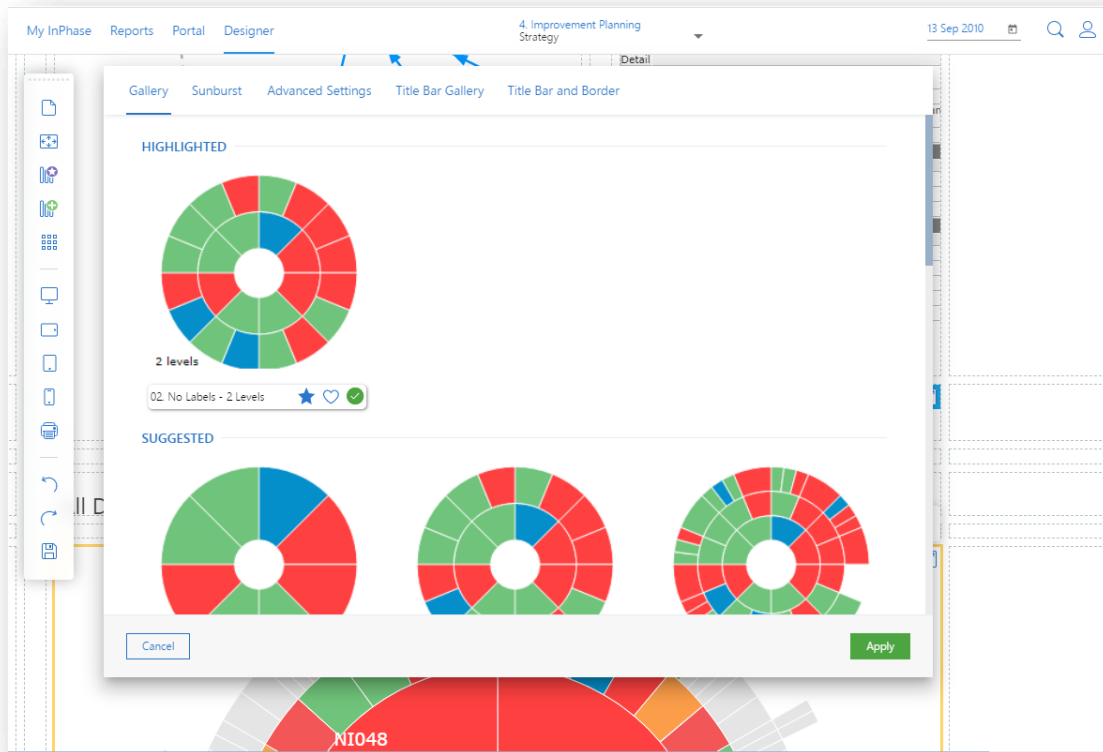
Freedom from Internet Explorer and ActiveX

InPhase 21 is fully cross-browser based with no client installation required.

The Administrator application has been replaced with a modern web-based app:



Designer has been re-written as modern cross-browser compatible app with considerations for responsive designs to work across multiple user devices with minimal effort by designers. Designer no longer uses ActiveX.

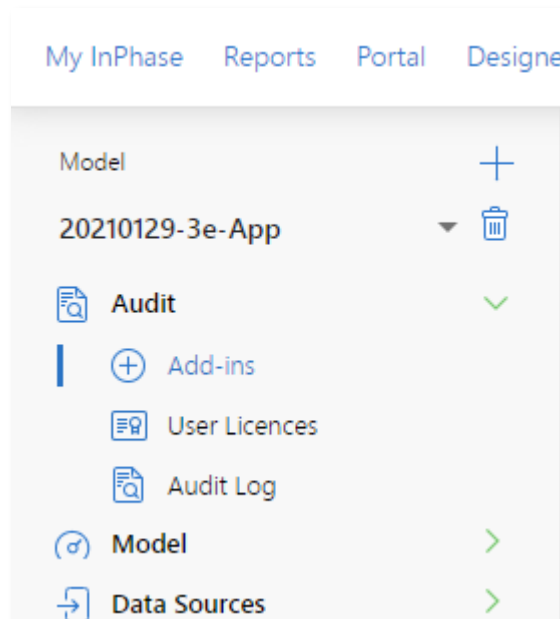


Administrator

Overview

The administrator is fully browser based will allow a Model Administrator level user to administer their models.

The left-hand menu provides access to the Model selection and the administrative areas of the selected model.



Audit

This area provides access to:

- Add-Ins: The optional features that require a key to activate e.g. Risk management
- User Licences: Report of number of licences allocated with the ability to view those users and update the users with that licence level.
- Audit Log: InPhase's Audit log which is fully interactive with filters and ability to group by different dimensions.

Model

This area provides access to Model settings, look up values etc:

- **Model Settings:** The default settings for the Model such as Financial Start Date. This also includes **Brand Colours**.
 - **Brand Colours:** The brand colours contain 7 colours that can be set and will be accessible by all designers, providing a frictionless access to the same colour set to assist with creating a harmonious InPhase implementation.
- **Measures:** Allows the creation, update, and deletion of Measure definitions. The user can view the Objects that contain instances of the Measure. You can now “reset” all measure instances to use the same measure name and description.
- **Planning Patterns:** Allows the creation, update, and deletion of Planning Patterns.
- **Units:** Allows the creation, update, and deletion of Units.
- **Comment Subjects:** Allows the creation, update, and deletion of Comment Subjects.
- **Keyword Management:** Allows the creation, update, and deletion of Keywords.
- **Jobs:** Allows the creation, update, and deletion of Jobs.
- **Task Notifications:** Allows the configuration of the **DEFAULT** notifications given to tasks.
- **Booster App:** Boost your InPhase model with ready to use Apps.

Data Sources

This area allows the user to configure access data from another system either directly or via an import into InPhase for increase capabilities:

- **Live Connect:** Connect to a 3rd party data source to display its data seamlessly within InPhase.
- **Scheduled Import:** Consume data from a 3rd party data source and store within InPhase to allow full performance reporting, aggregation, forecasting and more.
- **Master Data Management:** Managed Live Connects and Scheduled Imports.

People

This area allows the user to configure the employees within their InPhase model. Employees do not require a licence to exist within InPhase, but they will not be able to access InPhase.

- Org Chart: View and manage the Organisation Chart.
- Employees: Create/update/delete employees individually.
- Groups: Create/update/delete groups. When dealing with restricting access to data, we recommend using groups to allow quick reassigning of access rather than individually updating all report/objects within the InPhase Model.
- Bulk Employees: Export the full list of employees or upload a list of employees to create/update e.g. using an export from an HR system.
- Bulk Organisation: Export the full list of organisational units with their manager and the parent organisational unit or upload to quickly create the organisational structure.

Custom Types

This area allows the user to configure and create object types.

- Type: Ability to create Custom Object types and set defaults
 - Icon: Icon used in View widgets (see My Page) and on Minimal cards in Model Map
 - Model Map Colour: Colour of Object Type on the Shape cards in the Model Map
 - Model Map Shape: Shape of Object Type on the Shape cards in the Model Map. NOTE: All Measure use a single shape (rounded rectangle), but use the colour from the Object
 - Measures: Ability to create/update/remove the measures that are part of a new instance of the Object Type.

- Tasks: Ability to create/update/remove the tasks that are part of a new instance of the Object Type.
- Keywords: Ability to set the Keywords for new instances of the Object Type. The default Keyword affects the Keyword card on the Model Map.
- Form Builder: Ability to create/update/delete the Forms for an Object Type. Custom Fields are create/updated inline.
- Measure Custom Fields Builder: Ability to update which Custom Fields are used by ALL measures. Custom Fields are create/updated inline.
- Task Custom Fields Builder: Ability to update which Custom Fields are used by ALL Tasks. Custom Fields are create/updated inline.

Custom object types can be created by Model Administrators. No need for login with Template Editor.

NOTE: Template Editor user still exists but only used internally by the system to prevent issues with Employees being deleted.

Export

Extract data from InPhase for another system or for the Citizen Portal

- Export Data: Export Measure data for a date range. *The Measures to export are defined by Saved Searches (Dataset) from within the Power Query in Designer.*
- Export Citizen Portal: Select the Portal Object to export for importing into the Citizen portal.

Database Configuration

Configure the InPhase Application, affecting the entire system.

- General: Settings for the website url, user database and notifications.



- Authentication: How InPhase authenticates users.
NOTE: AzureAD SSO needs to be configure by InPhase technical staff
- Passwords: How to validate passwords to ensure complexity and prevent weak passwords.

Designer

Overview

Designer is fully web-based and requires no additional installation. Page designs are all based on Grids which are native to all modern browsers.

A collection of Pages are combined into a single Portal.

Page Design

Concept

An InPhase page comprises of;

- Page Name
- Page dimensions
- Background images and/or background colours
- Optional Menu: This provides access to other pages in the portal or to pages in other portals and fully configured by the page designer.
- 1 or more Sections
- Grids within Sections
- Cells within Grids

All page designs have the following layout structure;



There are various types of page templates.

Simple Grid and Menu	<p>This template creates a page initial set to 1258 px wide, complete with one grid (four equal-sized panes) and a page menu. The page size can be amended as required.</p> <p>Please see Page Width & Alignment for further information</p>
Headlines and Details	<p>This template contains 14 cells designed to display Headlines and Details. The first row of cells can be used to display infographics, with the larger cells underneath better suited to tables or larger charts.</p>
Full Width No Menu	<p>This template contains 9 cells, set to fill the full width of the page, with no menu bar.</p>
Fixed Width	<p>This template contains a fixed width, useful for building pages where printing to pdf or exporting via the WordApp are requirements.</p>
A4	<p>This template will allow a page to be specifically created for printing on A4 paper.</p> <p>This template creates a page initial set to 768 px wide (A4) , complete with three grid (twelve panes) and a page menu. The page size can be amended as required. Whilst the page size can be amended, this will ensure that the page no longer supportive of A4 printing.</p> <p>Please see Page Width & Alignment for further information</p>
Blank	<p>Build a page from scratch using the Blank template. Grids can be added by the user once the page has been created.</p>

Sections

Each section is 100% width of the browser and contains a single Grid. Each section can have a colour and background image set.



Grids

A grid contains one or more cells, with the ability to span columns and rows, but not overlap e.g.



The width of the Grid is set in the page size and will automatically shrink horizontally based on the browser's width. The Grid will automatically change layout as the browser hits different pre-configured browser widths (called breakpoints).

Grids can have:

- Configurable cell spacing between the Cells.
- Background colours and / or background images

Cells

A Cell can contain a single Widget e.g. Trend, Sunburst, Notebook.



The Cell can be configured to auto expand vertically based on the Widget. Visualisations that scale to fit will not dynamically affect the height e.g. Sunburst, Bar Charts, Infographics, Model Maps, GIS.

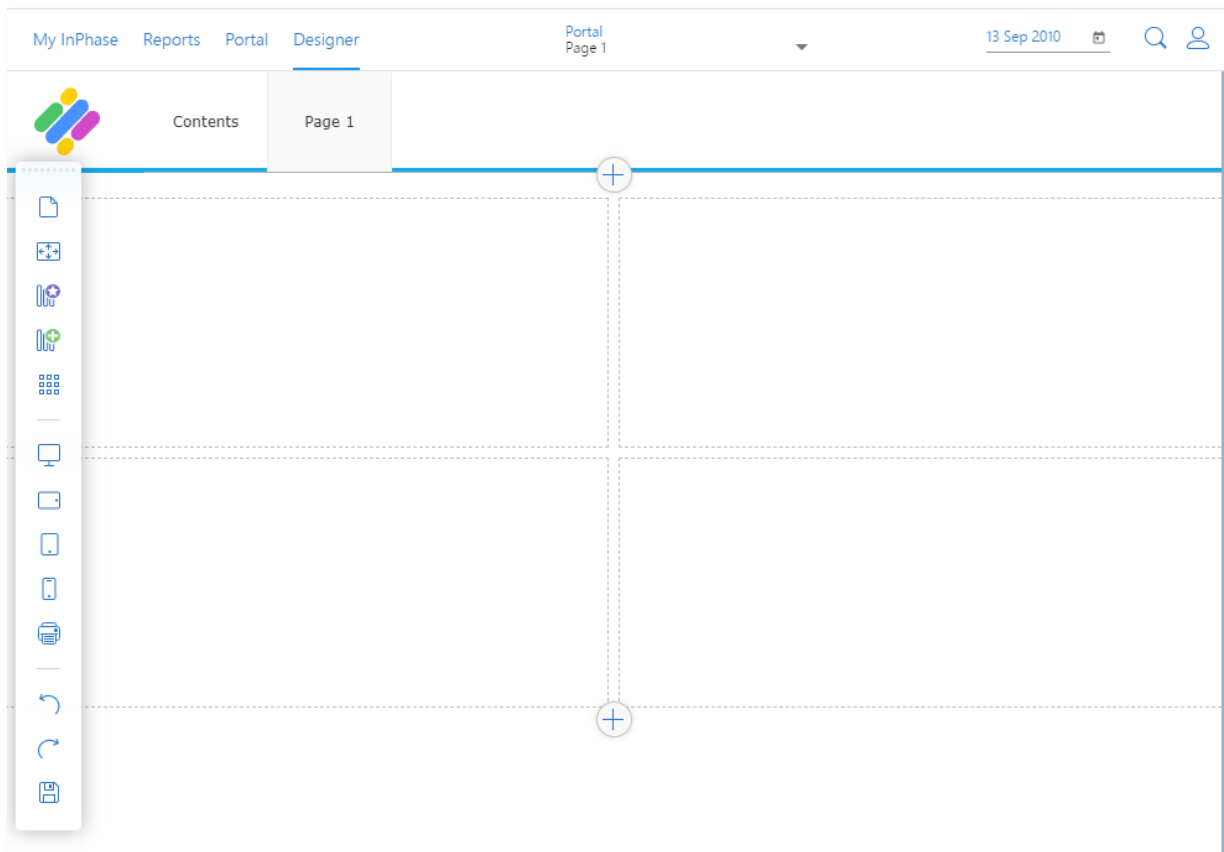
The Cell can have a colour and background image set.

Page Designer – Layout

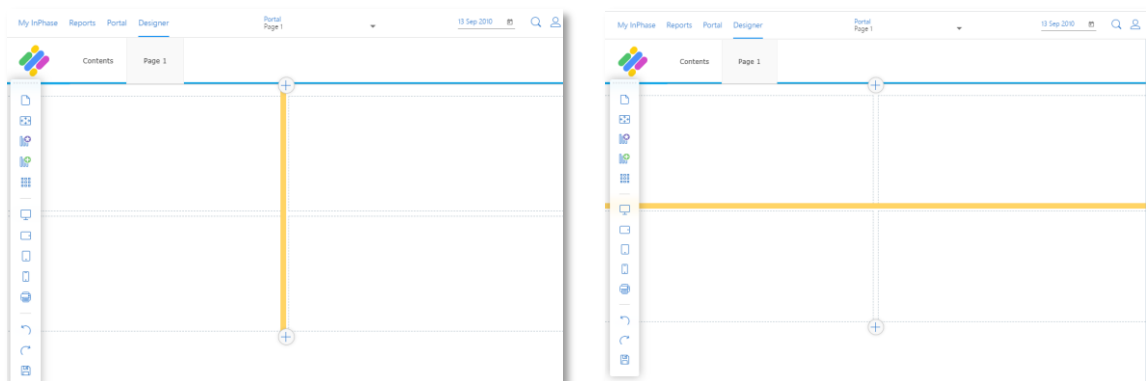
The page designer provides access to all layout controls for sections, grids, cells and access to select Widgets to include on the page.

New Pages are created using selectable template grid layouts.

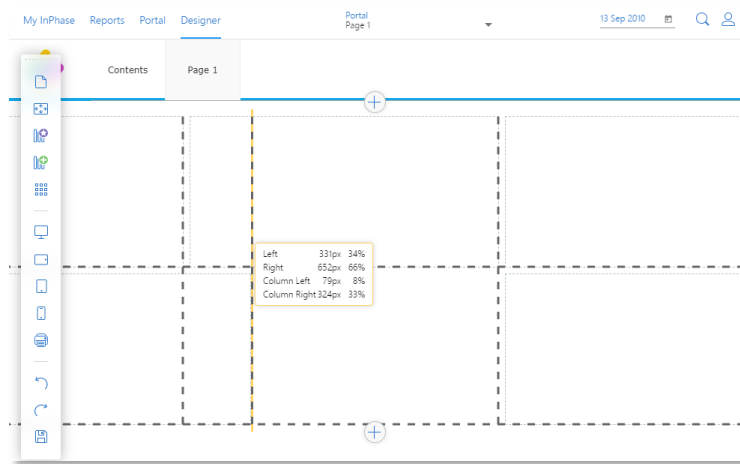
A new page using a single 2x2 grid:



The grid columns and rows can be resized directly with grab handles:



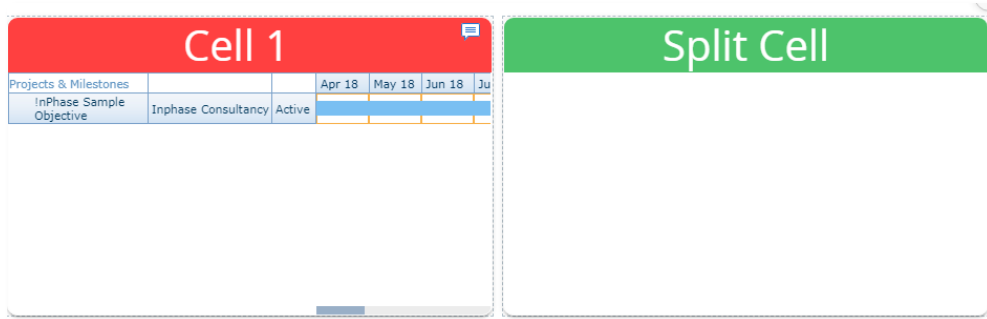
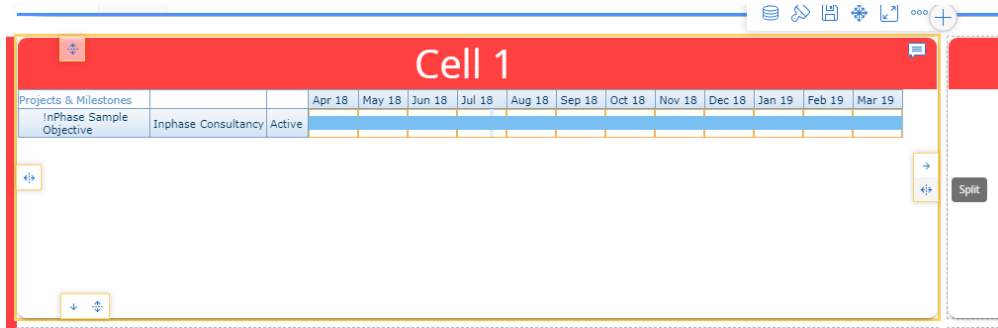
On resize the underlying columns and rows are made visible by dotted lines:



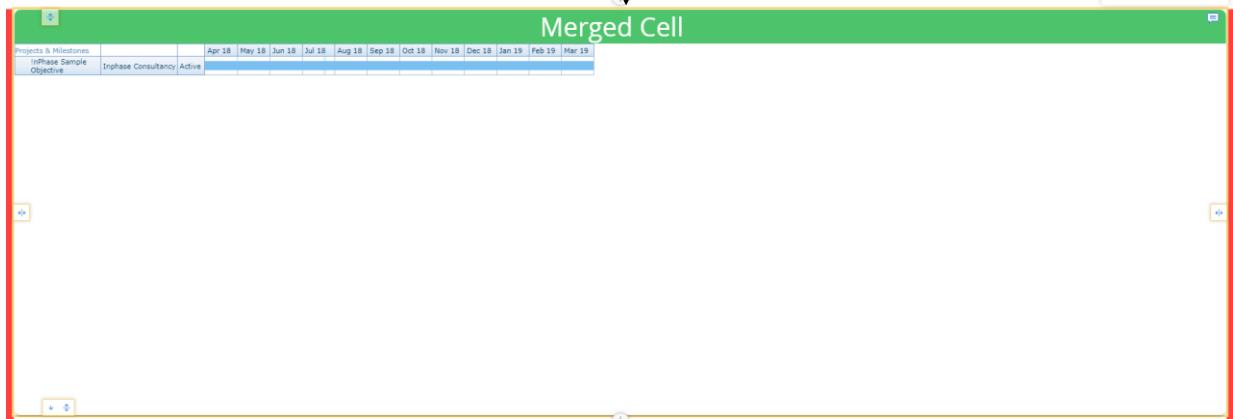
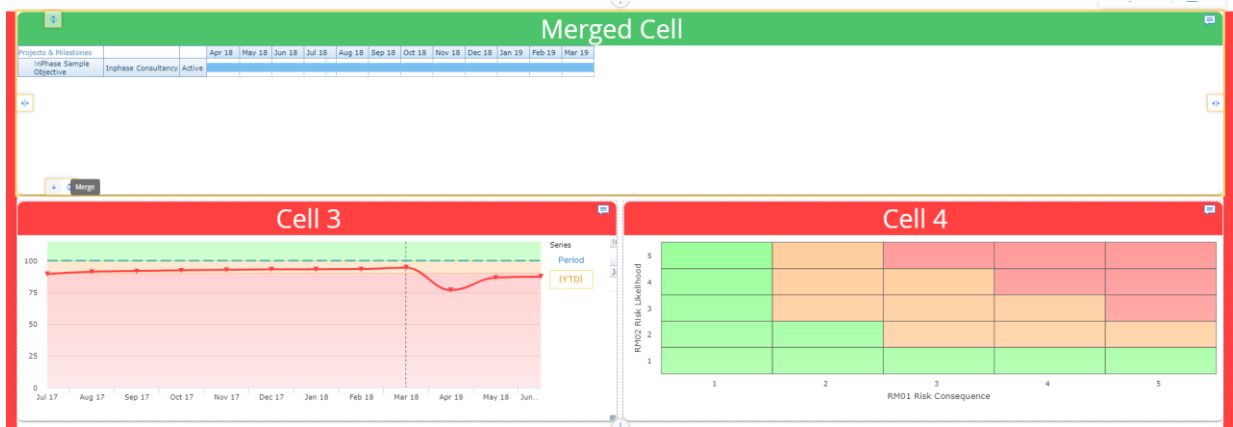
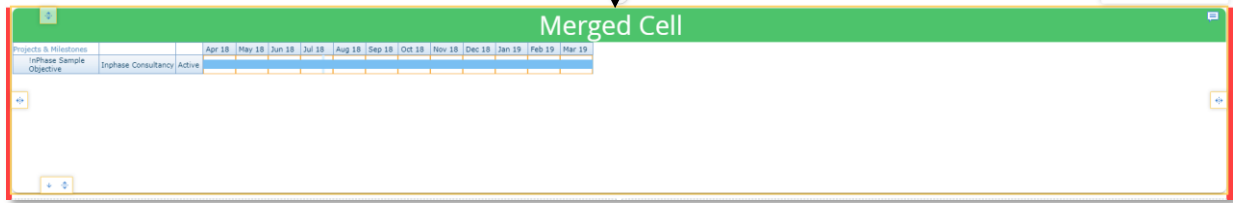
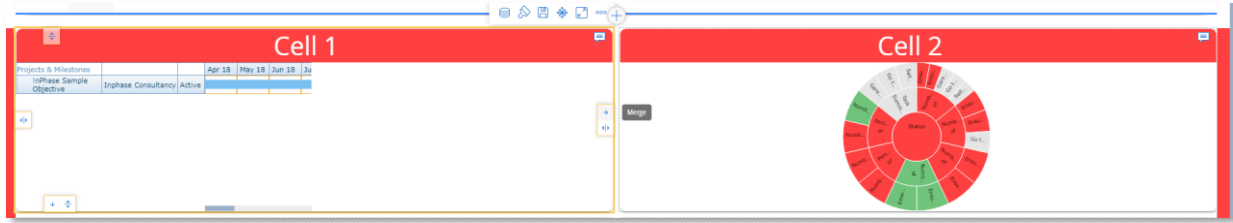
Resizing a column will affect both the column to the left and column to the right of the grab handle. The column widths are a percentage of the available space and all columns widths will add up to 100%.

Resizing a row will only affect the row above and is stored as pixels.

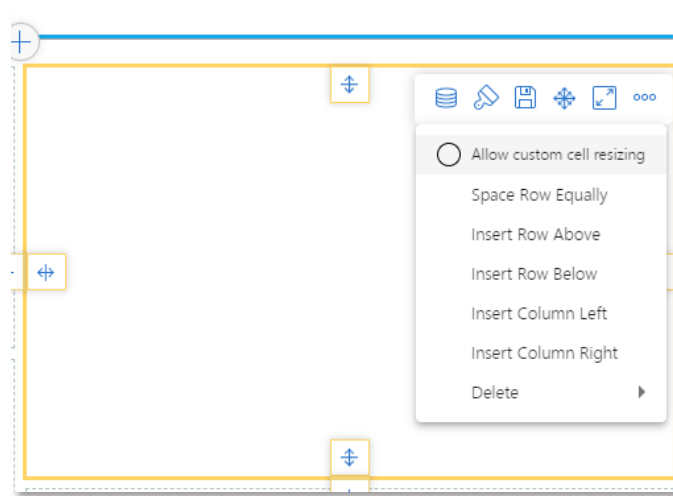
A single cell can be split into two cells:



Two or more cells can be merged into a single cell:



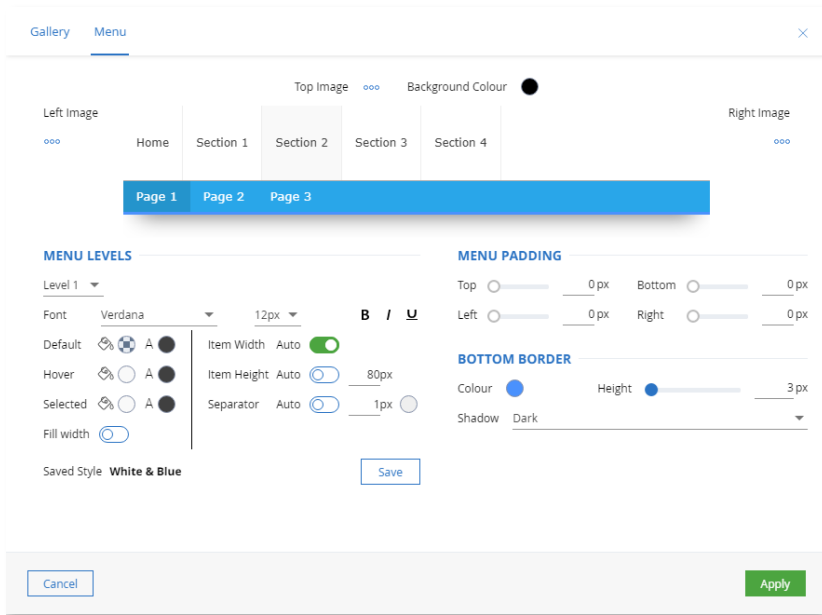
An Advanced option allows the page designer to resize a single cell individually:



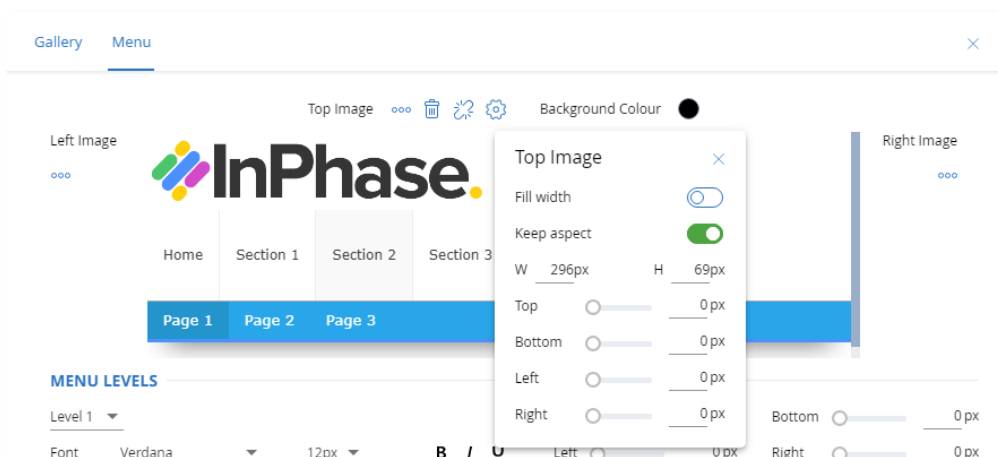
Menu

Responsive menus are now even easier to create. Within the edit menu pop up there are controls for;

- 2 Level Menu styling
- Menu Padding
- Bottom Boarder Control
 - Including new drop shadow options

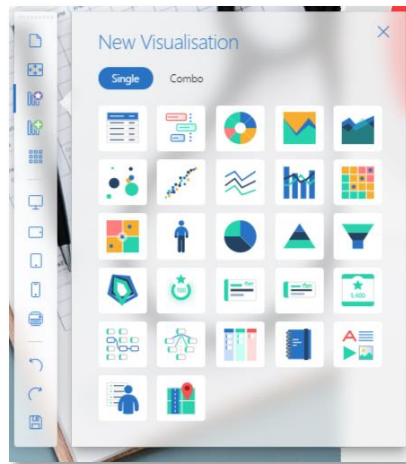


It is also now easier to add images to your menu with image sections to the left, right and top plus positional controls within each image section.

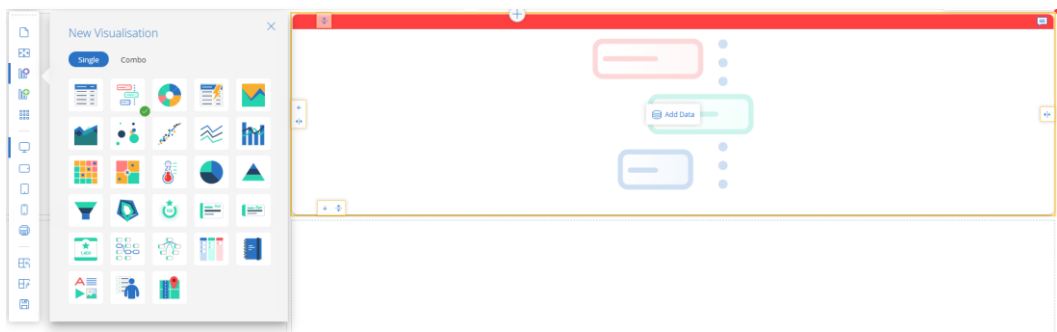


New Visualisation

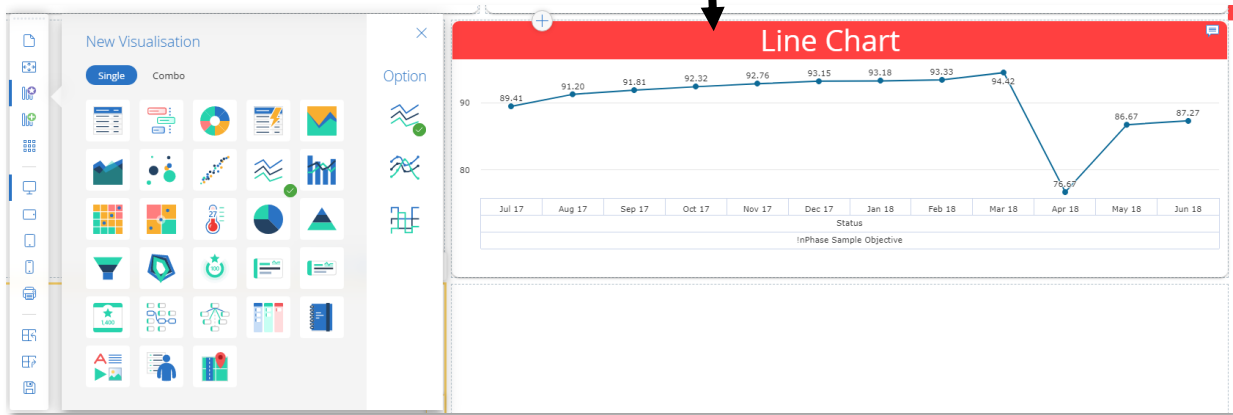
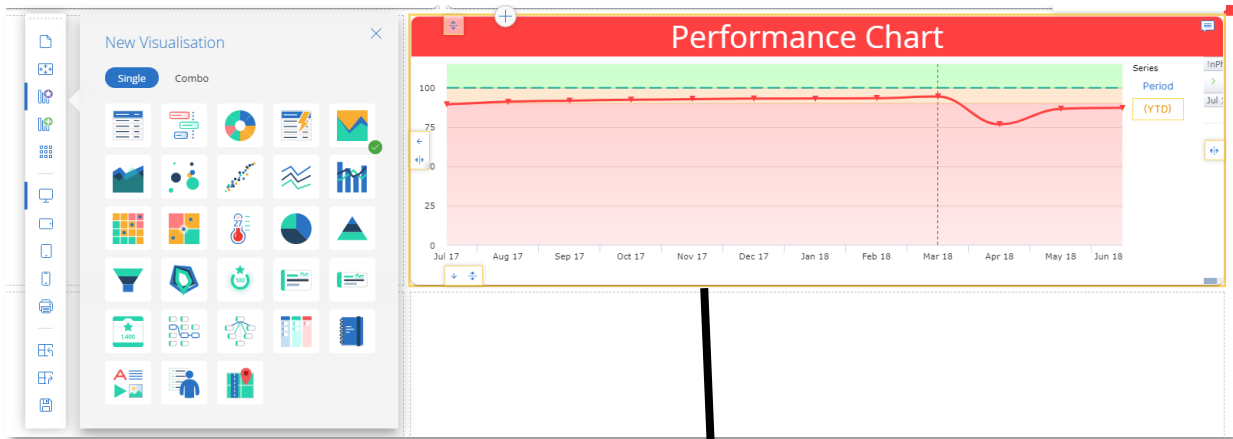
The new visualisation menu provides a more intuitive and visual way to add a widget to a cell.



Inserting new widget type displays a placeholder image until data is selected.



Swapping a visualisation but retaining the data in focus has been made simple and easy to do. By simply selecting a cell with a visualisation in it you can go to the New Visualisation menu and select the visualisation you wish to use. The cell will display the data already in focus in the visualisation you have selected



Saved Visualisation

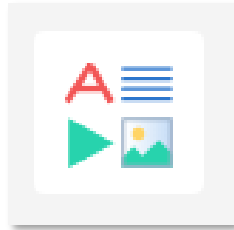
The new Saved Visualisation menu provide the ability to search and preview existing saved widgets by name, type, owner and preview before use.

Found 20 Visualisations

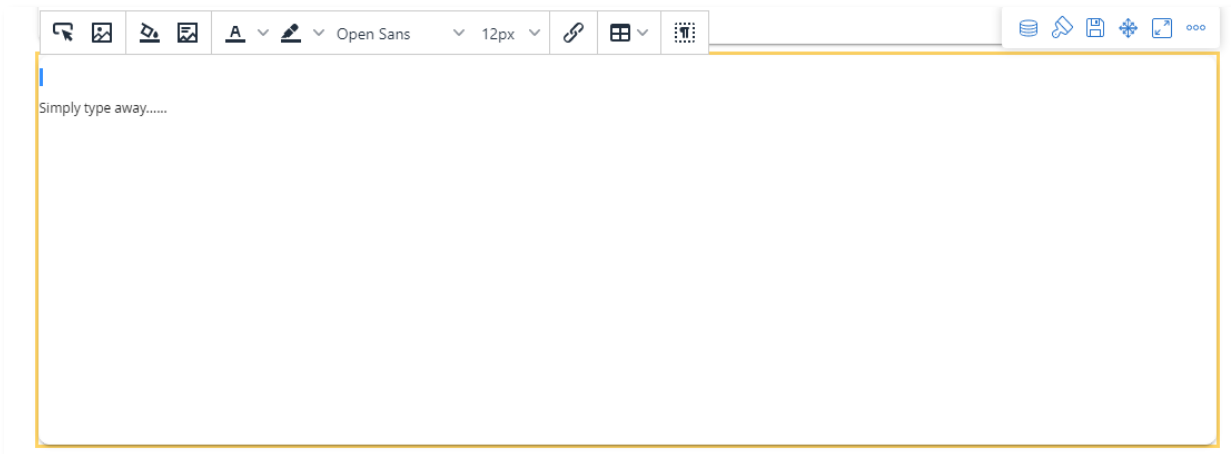
Type	Name	Use
<input checked="" type="checkbox"/>	In14 Dashboard (Sunburst) - Summary Sparkline	+
<input checked="" type="checkbox"/>	AM Dashboard (Sunburst) - Summary Sparkline	+
<input checked="" type="checkbox"/>	CB Dashboard (Sunburst) - Summary Sparkline	+
<input checked="" type="checkbox"/>	IC Dashboard (Sunburst) - Summary Sparkline	+
<input checked="" type="checkbox"/>	JT - Sample Performance Chart	+
<input checked="" type="checkbox"/>	MC - Trends 3	+
<input checked="" type="checkbox"/>	MC14 Dashboard (Sunburst) - Summary Sparkline	+
<input checked="" type="checkbox"/>	PC - New Performance	+
<input checked="" type="checkbox"/>	PMO Costs - Actual Cost vs Budget and Forecasted Cos	+
<input checked="" type="checkbox"/>	PMO Hub - Full Year Finance Trend	+
<input checked="" type="checkbox"/>	Prevent Waiting Time Breaches - Summary Sparkline	+
<input checked="" type="checkbox"/>	Programme Costs - Actual Cost vs Forecasted Cost	+
<input checked="" type="checkbox"/>	Programme Hub - Full Year Finance Trend	+
<input checked="" type="checkbox"/>	Project Hub - Full Year Finance Trend	+

Text and Graphics (Freeform)

The Text and Graphic visualisation (commonly called Freeform) has had a complete makeover in InPhase21.

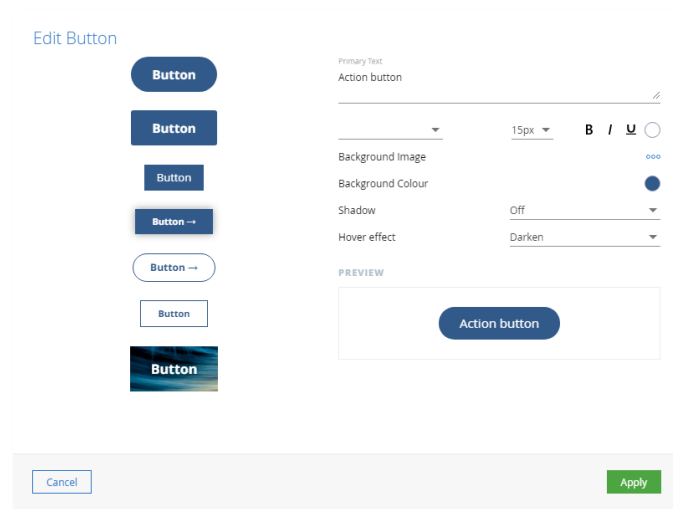


When a Text and Graphic visualisation is added you can are instantly in text entry (like Word) and can just start typing. There is also now table support so you can build a table right in the visualisation.

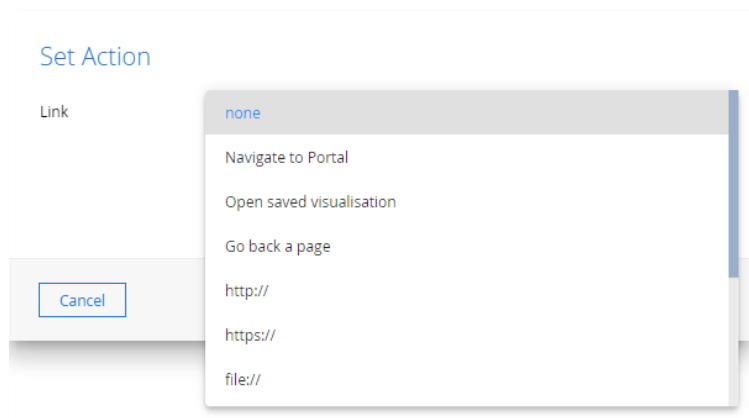


Creation and configuration of Buttons is now an embed function within the visualisation. For each button you can;

- Chose a shape and style
- Edit the text
- Add a background image
- Add a background colour
- Add a shadow effect
- Control the hover over effect



Once styled you can then set the specific action you wish the button to carry out, now including the ability to create needed or affected object links.



Please note that shortcuts have now been released with the ability to link directly to a portal and page

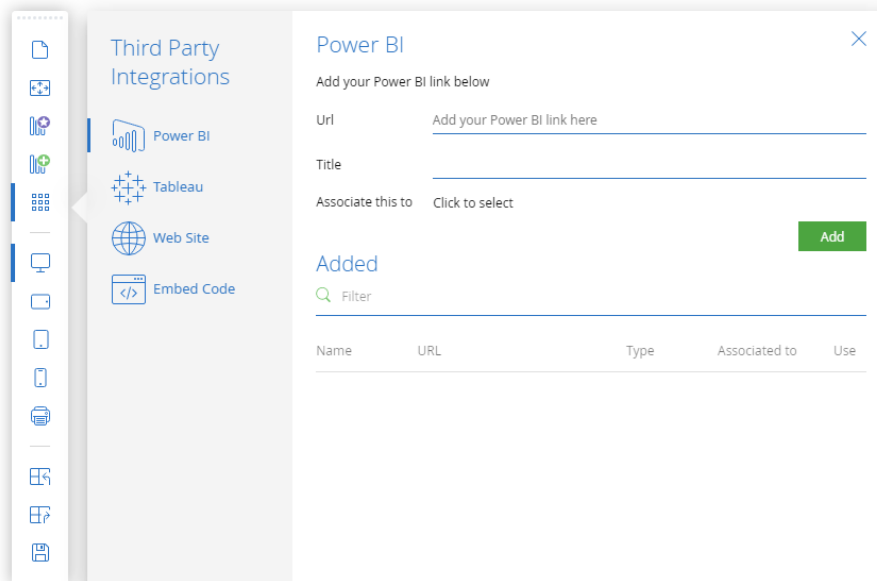
Third party Integrations

The embedding of a third party visualisation has also been re imagined in InPhase21.

Using the Third Party Integrations menu you can embed the following directly into a cell;

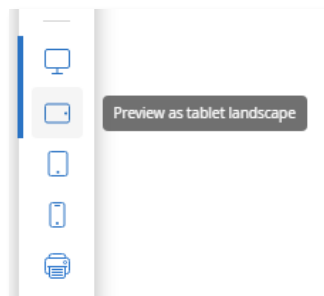
- Power BI Visualisaion/Dashboard
- Tableau Visualisation/Dashboard
- A Website
- Other media sources that allow HTML embedding (e.g. YouTube videos, or Microsoft Sharepoint Documents)

Simply select the type of integration you need and complete the details required.

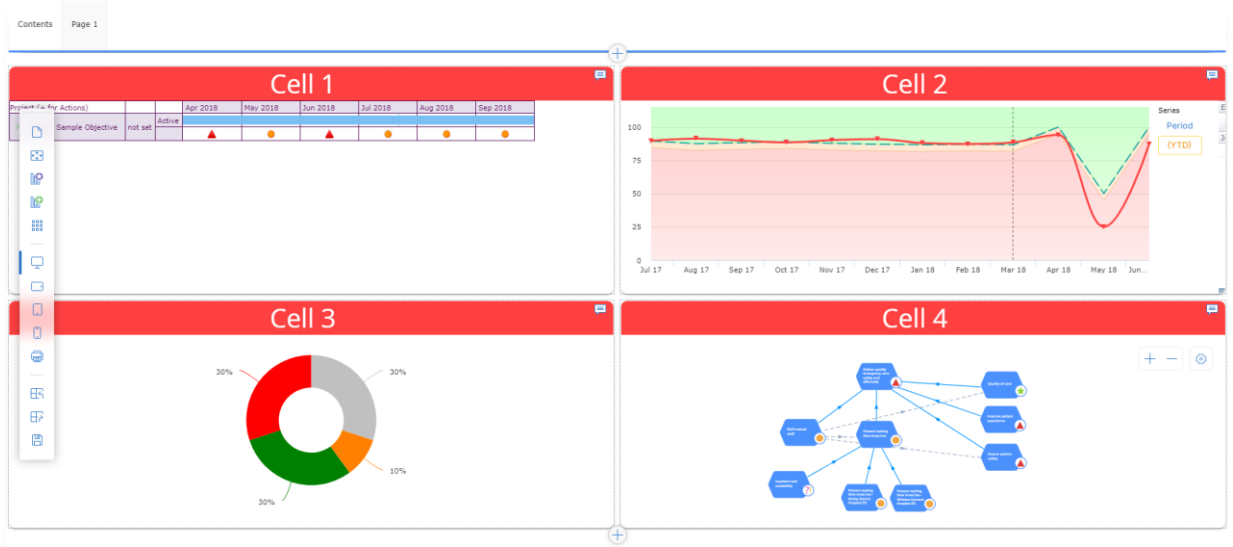


Page Preview

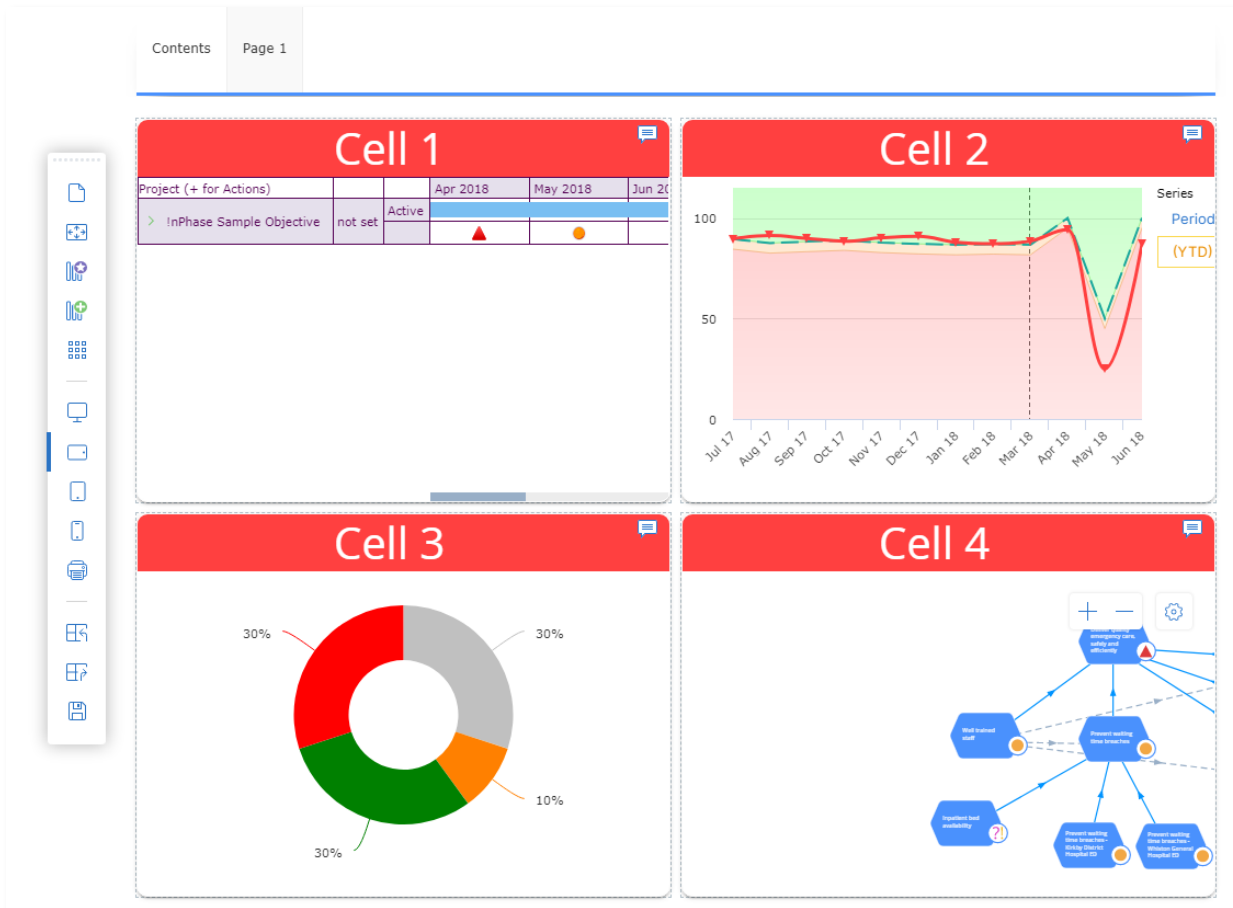
InPhase21 Designer brings you the ability to preview your design across different device sizes. Using the Preview option on the Designer menu you can select a different screen size to see how your layout will respond.



Desktop preview example



Landscape tablet preview example



Portrait tablet preview example



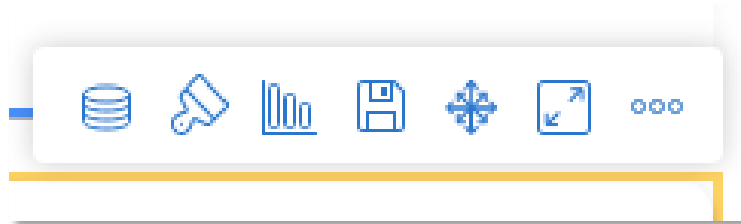
Mobile preview example



Cell Menu

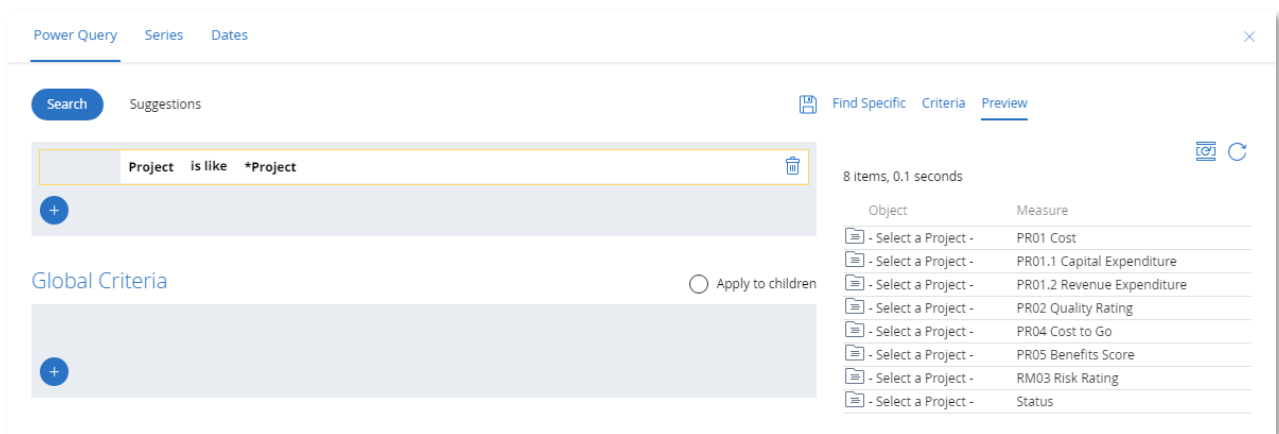
Each cell has a cell menu that provides access to;

- Power Query (data)
- Styling
- Chart Designer
- Save
- Positional tools



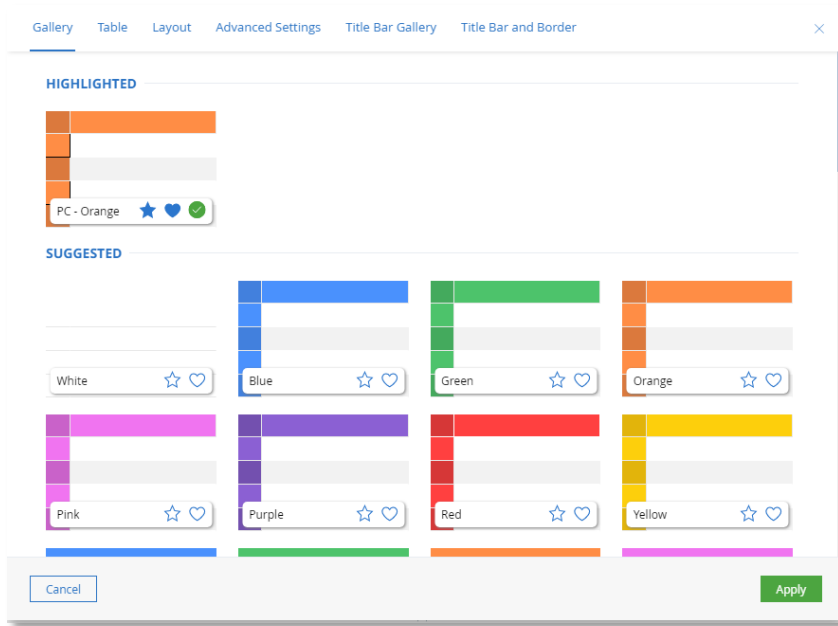
Power Query (Data)

Power Query is the new way to add content to your visualisations. Power Query replaces widget content pop ups but retains all the features you are use to seeing.



Styling

All styling features for cell title bars and tables has been moved into one Styling area. Here you can work through the tabs either selecting from our new styling gallery or by customising your design on your own.





Unsupported Legacy Features

Scorecards

The ability to edit existing or create new Scorecard is not supported in InPhase21. Existing Scorecards can be used in Enterprise mode.

It is advised that users explore the added capabilities of trends as a replacement or if there is no need to edit to continue to use scorecards in Enterprise only.

New features and widget types are in development to bridge any gap in functionality.

Object Measure and Task Notifications

The ability to edit Object Measure and Task Notifications is currently not supported in InPhase21. Notifications will however continue to function as expected.

New notification functionality is in development.

Benchmarks

The ability to edit, add or remove Benchmarks is not currently supports in InPhase21. Existing Benchmarks will continue to work as expected.

Benchmark functionality is un development.

Top Tips

Page Layouts

Old page layouts are converted to the new Grid layout automatically. This can result in many small 'spacer' cells to achieve placement fidelity. Although not a requirement, reducing the number of empty spacer cells on pages will make the page more efficient and easier to adjust.

Background freeforms

Background freeforms have been replaced the ability to add background images on Page, Section, Grid or Cell. Although background images be visible in enterprise mode without need to be edited, if you are editing a page in the new InPhase21 Designer it is advised that the image is replaced.

Menus with Free Form Images

All menus using freeform use in Page menus are replaced with an easier more flexible menu editor than manages images, old menus using freeforms will need to be edited to add the images.

Scorecards

17.6 Scorecards can be used in Enterprise mode but cannot be edited. New scorecards cannot be created in InPhase21. It is advised that users explore the added capabilities of trends as a replacement or continue to use scorecards in Enterprise only until a future planned replacement widget is deployed.

Freeform Buttons

All existing freeform buttons will continue to function however it is advised that all buttons are replaced with the new free form button feature in InPhase21.

Hardware Requirements

Please note: if you are using a virtualised environment then these requirements **must** be set as **minimum reserved resources**.

COMPULSORY TECHNICAL NOTE

There is no virtual environment over-allocation of resource configuration that is approved for InPhase.

Application Web Server

	Minimum under 50 users	Standard max 200 users	Up to 500 users**
RAM	8GB	12GB	16GB
Disk	At least 15% free space (min 250GB) 7200rpm or faster 32MB or greater cache	At least 15% free space (min 500GB) 7200rpm or faster 32MB or greater cache	At least 15% free space (min 1TB) 7200rpm or faster 32MB or greater cache
CPU	4 Core 2.4 GHz or faster	8 Core 2.4 GHz or faster	12 Core 2.4 GHz or faster

Database Server

	Minimum under 50 users	Standard max 200 users	Up to 500 users**
RAM	8GB	12GB	16GB
Disk	At least 15% free space (min 250GB) 7200rpm or faster 32MB or greater cache	At least 15% free space (min 500GB) 7200rpm or faster 32MB or greater cache	At least 15% free space (min 1TB) 7200rpm or faster 32MB or greater cache
CPU	4 Core 2.4 GHz or faster	8 Core 2.4 GHz or faster	12 Core 2.4 GHz or faster

Combined Application and Database Server

	Minimum under 50 users	Standard max 200 users	Up to 500 users**
RAM	16GB	24GB	32GB
Disk	At least 15% free space (min 500GB) 7200rpm or faster 32MB or greater cache	At least 15% free space (min 1TB) 7200rpm or faster 32MB or greater cache	At least 15% free space (min 2TB) 7200rpm or faster 32MB or greater cache
CPU	8 Core 2.4 GHz or faster	12 Core 2.4 GHz or faster	16 Core 2.4 GHz or faster



Software Requirements

For an application (web) server that hosts the web application with the SQL Server databases hosted on a separate server, the requirements are:

- Latest version of Microsoft Windows, minimum Windows 2012 Server or above including the most recent service packs,
- Microsoft .NET Framework™, Version 4.7.2
- Modern Browser; Chrome, Edge, Safari, Firefox

For a database server (not acting as the Web application server) the requirements are:

- Latest version of Windows Server, minimum 2012 Server or above including the most recent service pack
- Latest version of Microsoft SQL Server, minimum 2008R2, or above (Standard edition or higher), including the most recent service pack

For Designer mode use

Microsoft Windows PC Windows 10.

- Modern Browser; Chrome, Edge, Safari, Firefox

For Enterprise mode use – main users

Microsoft Windows PC or tablet, Windows 10,

- Modern Browser; Chrome, Edge, Safari, Firefox

Apple MacBook, macOS, iMac, with Chrome, Safari.

iPad or iPhone with Chrome, Safari.

Windows phones with Edge.



InPhase Cloud Hosting

Improve the currency of your version updating and reduce your total ICT costs by using InPhase Cloud Hosting. Options available include:

InPhase on Microsoft Azure managed servers with high speed servers and 100% redundant failover, includes your Windows Server Licences, SQL Server Licences, disc storage, daily back-up and 14 day retention, full latest version update service within 14 days of release.

UK and European, ISO 27001

All InPhase hosting servers guaranteed to be UK and European based, ISO 27001 security standards, multi-location failover facilities, Tier 1 connection.

All our hosted servers can now support encrypted Live Connect to SQL servers, either in the cloud or on-premises.

InPhase Microsoft Azure AD and MFA

InPhase 21 supports Microsoft Azure Active Directory Federated Services, with optional Multi-Factor Authentication. This can be supported either from our hosted options or from a self-hosted server.