



Kensa Health
Analytics

Add-Ins

Using the v2_4 sfn Add-Ins for
Microsoft Office





Contents

Introduction	3
Creating documents, workbooks and presentations	4
Setting up a password in sfn.....	7
Manage sfn Server URLs	9
Adding sfn Server URLs	9
Editing and Removing sfn Server URLs	10



Introduction

The sfn Add-Ins for Microsoft Office allow you to embed signalsfromnoise® (sfn) Chart, Dial and Table images into Office applications, and refresh the images at the click of a button. There are separate Add-Ins for Excel, Word and PowerPoint, which all work the same way. There are two components to the Add-Ins:

1. Adding and refreshing Charts, Dials and Table images to documents/spreadsheets/presentations
2. The management of sfn servers that supply updated Charts, Dials and Table images.

All sfn Charts, Dials and Table images must have a registered sfn Server to allow the images to be refreshed. This requires user access to be authenticated before users can insert or refresh any sfn images.



Creating documents, workbooks and presentations

1. In the relevant Office application, create a new item (a document, workbook or presentation as appropriate).
2. Paste the sfn Chart, Dial or Table image(s) into the Office application:
 - a. From within the sfn Analysis Client, using the *Copy Chart Image* menu option copy any dial, chart or table images that you require.
 - b. From the Viewer, using the *Copy image to system clipboard* menu option copy any dial, chart or table images that you require.

Note: Depending on the option you used to copy the images, they may have window borders – these will be removed when you refresh the images, as described below.

3. Click on the *Add-Ins* tab in the Office ribbon then click the *Show sfn Task Pane* button (in the sfn group).

Note: Other Office add-ins can use the *Add-Ins* tab, so you may see other buttons on it (or even empty spaces for buttons). The *Add-Ins* tab may also have been renamed by an installation of add-ins from another software vendor, and so may not be labelled as *Add-Ins*.

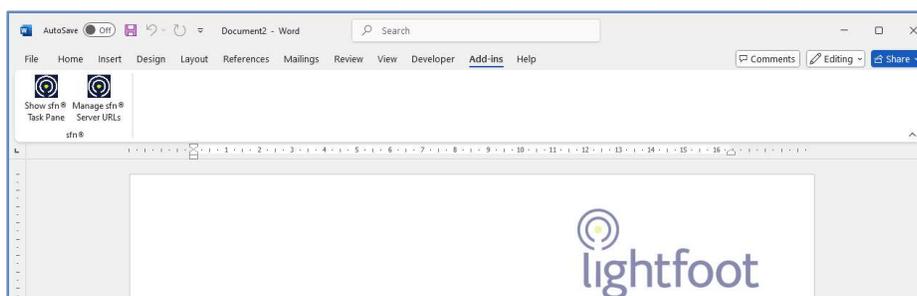
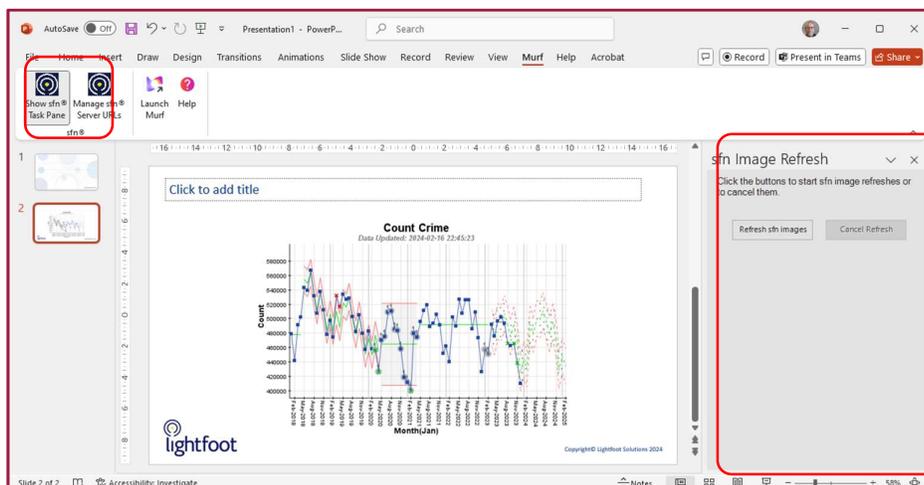


Figure 1: Word Add-Ins ribbon bar

4. Click on the *Show sfn® Task Pane* button. The side pane will appear, as the *sfn Image Refresh* pane.

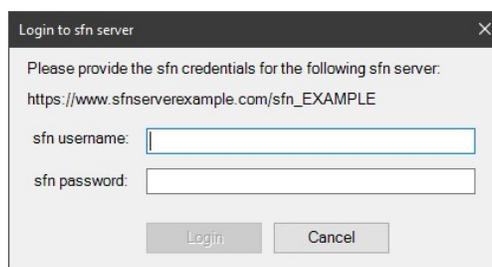


5. Click the *Refresh sfn Images* button.

Note: If this is the first time the chart images have been refreshed, or if there are any new images from unregistered sfn systems, the *Invalid of Unregistered sfn Image URL* message will display, warning users that there are sfn images that do not have a registered server to refresh from. Click the *OK* button to dismiss this warning and proceed to **Manage sfn Server URLs** to add a registered server.



6. Enter your username and password for the identified sfn system.



Notes:

- If your system has two-factor authentication enabled, then when you click the *Refresh sfn images* button you will be prompted for an authentication code (as when you log in to the Viewer or the Analysis Client). If your system is set up to provide this by email, an *Email code* button is provided: if you click the button an authentication code will be emailed to you.
- If the refresh seems “stuck” (for example, if the network is unavailable) you can click the *Cancel Refresh* button to interrupt the refresh. Any sfn images that have already been refreshed will *not* be reverted.



- If there is an error, a pop-up dialog will give you the details and the sfn image that cannot be refreshed will be selected to highlight the problem.
- When the refresh is complete, the *Refresh sfn Images* button will become active again, deactivating the *Cancel Refresh* button.

7. Save the document, workbook or presentation or save as a template.



Setting up a password in sfn

For users who typically use a username and password to access sfn you can skip this section

Users who use SSO to connect to sfn and who don't have a password will need to setup a password to run the Add-Ins.

1. To get a password start by opening the sfn Viewer and click the **sfn** button outlined in red, instead of the Single Sign-On button.



2. Enter your full email address as your username and click forgotten password.

Enter your sfn username and password

sfn

username

password

[Forgotten password?](#)

3. Click “yes” to send an email reset.
4. An authentication code will be emailed to you, enter in the box below and click proceed. A message will state you have been successful click yes OK to send a password reset email.

Enter your sfn username and password

sfn

username

password

[Forgotten password?](#)

Authentication code

Please enter the One Time Passcode sent by email.
If you do not receive this, please contact your system administrator.

Authentication code:

5. Enter the temporary password and follow the instructions to enter your new password.



6. You will be asked for an authentication code, click the button to send code by email highlighted in the red box, click OK then enter the one-time 6 digit number sent by email.

Authentication code

Authentication code:

Trust this device:

Send code by email

Proceed Cancel

7. This password can be used to run the Microsoft Add-In
8. If you get an error message, ensure you have added the sfn server URL (see next section).
9. Save the document, workbook or presentation or save as a template.



Manage sfn Server URLs

To ensure sfn Charts, Dials and Table images display the most up-to-date results, they need a valid sfn server URL to be registered with the Add-In. This URL must originate from an authorised sfn server.

Note:

- The Add-In stores these URLs in the Windows® registry for each user. Once registered, the URLs remain in the registry until they are manually removed through the Add-In's management interface.
- sfn Chart, Dial and Table images can come from multiple sfn instances and databases. Multiple URLs can be registered. Users must have access to the sfn systems to see refreshed data.
- Registered sfn server URLs are automatically shared across Microsoft Word, Excel and PowerPoint products. This means if any sfn Server URL is registered in one Office application, it will be available in the other two applications when the sfn Add-In is installed for those applications.

Follow the steps below to register all required sfn Server URLs.

Adding sfn Server URLs

1. Click on the *Manage sfn Server URLs* button in the Add-Ins ribbon.
2. Enter the sfn Server URL into the *Registration* window.

Note: You can find the sfn Server URL from either the **sfn Launcher** application or the **sfn Viewer** web application. If using the **sfn Viewer** URL, the sfn Server URL is the Viewer URL without “/viewer”.

Registration of sfn server instances

This form allows you to maintain the trusted sfn servers for sfn image refreshes.

List of registered sfn server URLs:

Remove selected URL

Add URL

Save Changes

3. Click the *Add URL* button to add the sfn server URL to the list of registered sfn systems. Repeat this process for all required sfn Server URLs.



4. Click the Save Changes button to save the changes to the registered URLs.
5. Click the “X” in the top right corner to close the window.

Editing and Removing sfn Server URLs

Users can right-click on listed sfn servers and use the context menu to *Edit* or *Delete* an entry. Listed servers can be removed by selecting a server from the list and clicking the *Remove selected URL* button, and clicking the *Save Changes* button to finish.