Axiom Strategy Management 2018.4

Release Notes

Last Updated: 12/13/2018

KaufmanHall

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Summary

Kaufman Hall is pleased to announce the 2018.4 release of Axiom Strategy Management. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Contact support@kaufmanhall.com or your implementation consultant, and they will confirm an installation period with you.
3. **Back up Axiom database** – Kaufman Hall will confirm that you have a current backup of your Axiom database before applying the upgrade.
4. **Apply upgrade** – Arrange with your IT staff on an agreeable time for scheduled downtime to apply the program and product upgrade. This includes any post-upgrade hot-fix files that need to be copied into the system to address any post-release known issues that have been resolved.
5. **Complete manual updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

Support

As always, we appreciate your support of Kaufman Hall and look forward to continuing to meet your financial management needs. If you have any questions about your upgrade, contact Kaufman Hall Software Support at 1-888-543-6833 or support@kaufmanhall.com.

Training

Kaufman Hall offers multiple training options for our customers. These courses are part of your maintenance agreement and are free of charge. We strongly urge you to take advantage of all training options, including:

- Self-help videos
- Recorded webinars
- Virtual training courses

For a complete listing of our courses, please visit www.kaufmanhall.com.

Product upgrade notes

When upgrading to the 2018.4 version of Axiom Strategy Management, keep in mind the following:

- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

New features summary

This section includes a description for each new feature included in this release.

New Cost Reduction Status report

The Reports menu in the Navigation panel now includes a Cost Reduction Status report that displays performance results from Initiatives with cost-saving measures from the PI-Dollars-Performance Improvement measure class.

The report displays the actual savings and the cost savings goal of each performance-improvement Initiative for each current period and over a set time span, which for this report is the fiscal year of the Axiom Strategy Management Current Period YRMO. Report data is displayed in a table and two charts, and can be filtered to suit the viewer's needs.

Axiom Strategy Management executives and other users who have access to Initiatives in the report can use this report to monitor the achievement status of cost management initiatives.

For more information, see "About the Cost Reduction Status report" in the online help.

New common start form for creating Initiatives

When creating a new initiative, the initiative plan file creation process now starts with the same form regardless of whether you start the creation process from the Initiatives page, the Objectives page, or the Perspectives page.

The form, Generate a New Initiative Request dialog, now has the following additional features:

- Required fields display a red asterisk after the field name.
- You are required to specify a sponsor for the Initiative.

For more information, see "Create an Initiative" in the online help.

Measure Detail number formatting

Enhancements were made to measure values displayed in Measure Detail windows; formatting indicates the type of number data: dollar signs for currency, percent symbols for percentage values, and no symbols for other number values such as hours, minutes, days, etc.

- Currency data is displayed to two decimal places. For example, $100 displays as $100.00.
- Rate per unit (where unit = Amount) data is displayed to two decimal places. For example, $4.6789 rate per unit displays as $4.68.
- A rate per unit (where unit = Number) of 4.6789 displays as 4.68.
- Percentages display to one decimal place. For example, half a percent displays as 0.5%.

For more information, see “Drill on measure details” in the online help.

New Create Measure Data utility sets monthly targets

A new data utility allows system administrators to automatically create measure data rows with populated target fields for hierarchy items.

Users need to see monthly measure targets in charts and reports for comparison and analysis purposes.

System administrators need to be able to edit measure targets to respond to changing expectations.

To make this possible, the target needs to be set in the hierarchy item’s MeasureData table for each month that the hierarchy item measure is active. This applies to Perspectives, Objectives, and Initiatives. Instead of creating a new row for each month in the hierarchy item’s active period and entering the target data manually, the Create Measure Data utility automatically creates a row with the set target for each month through the end of the fiscal year for the length of the measure’s active period (start date to end date). For example, if an Objective measure starts on January 2018 and ends on December 2019, the utility creates rows in the ObjectiveMeasureData table with the target column pre-populated for all YRMOs from January 2018 to the end of the fiscal year in which December 2019 falls.

For more information, see “Create measure target data” in the online help.

Updated default data includes shared Comparative Analytics measures

The default set of measures installed during implementation has been updated to now include 79 measures shared between Axiom Strategy Management and Axiom Comparative Analytics, to facilitate the integration of the two systems. This update does not overwrite measures if users have customized the contents of any existing measures.

Initiative source column added to Initiative table

Axiom Strategy Management users with systems integrated with Axiom Comparative Analytics can have Initiatives originating in either product. A new column, InitiativeSource, in the Initiative table now indicates which program the Initiative came from: SM for Axiom Strategy Management, or CompA for Axiom Comparative Analytics.

Although this column is not viewable in the Web Client, system administrators can use this information in system administration or in reporting. Currently there are no Axiom Strategy Management-specific reports that use this data, but users can use the Report Builder to create reports indicating in which product an Initiative originated.

For more information, see “Report Builder” in the online help.

Issues resolved in 2018.4

The following table lists the resolutions for issues addressed in 2018.4, released on December 17, 2018:

Issue Description	Description
SM Home Page (and Product Area) are showing by default even if the product is not configured [TFS 29059]	**Summary:** In a system licensed for Strategy Management in addition to other products, the home page configured for Strategy Management will show by default for system administrators, regardless of whether they are using the product. It has been disruptive to the user workflow and is not a productive user experience. **Resolution:** Corrected by associating the Strategy Management feature with the SM product area and the Common Core feature with the KHA Suite product area.
SM Product Area - Navigation pane and product name for KHA Suite display when SM selected [TFS 29063]	**Summary:** If a user selects the Strategy Management product area, the product name on the navigation bar and the web navigation pane do not update. They continue to display the KHA Suite product area versions. **Resolution:** Corrected in TFS 29059 above.

Manual setup instructions

There are no manual setup tasks needed for this release.

Known issues

The following table lists the known issues in this release.

Issue	Description
Initiatives Template - Error if user attempts to delete non-default milestone before initiative save [TFS 28967]	**Symptom:** If a user attempts to delete an unsaved, non-default milestone before the initiative has been saved, the system displays an error. **Explanation:** To be addressed in a future release.
Initiative Creation Dialog - Objective field not cleared when perspective changed [TFS 29316]	**Symptom:** First, a user populates the Generate a New Initiative Request dialog. Then, after selecting a perspective and objective, they change their mind and switch to a different perspective. The objective remains populated, despite being associated with the original perspective selection. If the user proceeds to create the initiative with these mismatched values, the objective - and its actual associated perspective - display in the plan file. **Explanation:** To be addressed in a future release.
Measure Update Form - Paste icon doesn't work in spreadsheet mode [TFS 22399]	**Symptom:** When editing results in spreadsheet, the Copy and Cut icons work while the Paste icon does not. An information dialog displays, explaining that keyboard shortcuts can be used for these actions instead. **Workaround:** Can use Ctrl-C and Ctrl-V from the keyboard to copy and paste until resolved. **Explanation:** To be addressed in a future release.
Objectives Home Page - Multiple objectives can be highlighted after scrolling in dialog [TFS 23407]	**Symptom:** When using the scroll bar in the Select Objective dialog, the user can highlight multiple objectives. The most recently made selection is honored when the user clicks Select. **Explanation:** To be addressed in a future release.

Issue	Description
Measure Update Form - 'Edit in Spreadsheet' values don't display in form until refresh [TFS 23252]	**Symptom:** A user enters values in spreadsheet mode. The values do not immediately populate in the form after completing work in the dialog. To see the updated values, the user needs to refresh the form. This can be done by expanding/collapsing sections. **Explanation:** To be addressed in a future release.
Initiative Status Report - Values may overlap in 'Choose a value' dialog when item has long name [TFS 26587]	**Symptom:** Items with long names may overlap with other items in the Choose a value dialog. This occurs when an item has more characters than can display on a single line. **Explanation:** To be addressed in a future release.
Perspectives Home Page, Objectives> Objective Measures & Initiative lose the column headers once you scroll down and it may be confusing to the user [TFS 27175]	**Symptom:** Location: bottom section of the Perspectives Home Page where the Objectives are listed. From there, expand the Initiatives list and find one that has enough to cause you to scroll down to view more of the list. When you go past a certain point, the Initiative headers disappear. **Explanation:** To be addressed in a future release.
Measures Utility - All collapsed sections on tab expand after perspective/objective measure created [TFS 27394]	**Symptom:** Admins have the option to collapse all the sections on the Perspective Measure and Objective Measure tabs of the Measures Utility. If an Admin expands one section and adds a measure, the tab will reload with all the sections expanded again. **Explanation:** To be addressed in a future release.
Objectives Home Page - Owner values truncated at ~10 characters [TFS 27766]	**Symptom:** Values in the Owner column on SM Home Page - Objectives appear to be cutting off at ~10 characters. **Explanation:** To be addressed in a future release.
SM Main unhelpful error message when submitting without validation passing [TFS 28280]	**Symptom:** When submitting a newly created Initiative before saving, if it has some validation exceptions, the system displays an error message at the bottom of the screen. **Explanation:** To be addressed in a future release.

Issue	Description
Dashboard Home Page - Descriptions for aborted initiatives display in 'Subscribed Initiatives' section [TFS 28356]	**Symptom:** Descriptions for aborted initiatives display in the Subscribed Initiatives section. They may be misread as secondary descriptions for active initiatives. **Explanation:** To be addressed in a future release.
Objectives Home Page - No results returned if user scrolls, then runs search where number of matches doesn't require scroll bar [TFS 28213]	**Symptom:** A user runs a search on the Objectives Home Page. They scroll through the list of objectives, and then enter a search term that matches a small enough number of records to not require a scroll bar. No records are returned even though there are valid records. **Explanation:** To be addressed in a future release.
Measures Utility - Tooltips reflect previous values until save occurs [TFS 28433]	**Symptom:** If an Admin edits a measure field that has a tool tip (i.e. Description, GL Acct, Class or Formula), the tool tip displays the previous value until the form is saved. **Explanation:** To be addressed in a future release.
Measure Update Form - Aborted and completed initiatives available for selection [TFS 22837]	**Symptom:** Aborted and completed initiatives are available for selection in the Select an Initiative dropdown. **Explanation:** To be addressed in a future release.
Web Client Nav Pane - Menu items don't use preferred names [TFS 25211]	**Symptom:** The Strategy Management-specific version of the Web Client Navigation Pane does not use the preferred names for perspectives, objectives, and initiatives. **Explanation:** To be addressed in a future release.
Measure Update Form - 'Leave this page' dialog displays despite link opening new tab [TFS 25304]	**Symptom:** The Leave this page dialog that displays when users select certain links in the Measure Update Form appears to be a bit misleading. The dialog indicates that users will lose any unsaved changes and leave the page. In reality, the system opens a new tab, and any changes made in the Measure Update Form are maintained and are available to be saved until the original Measure Update Form window is closed. **Explanation:** To be addressed in a future release.

Issue	Description
Dashboard Home Page - Initiative Process Summary displays sections based on due dates, which aren't currently used [TFS 25895]	**Symptom:** The Initiative Process Summary section displays three buckets: New, Due Soon, and Overdue. We do not currently use due dates in the Initiative Approval Workflow, so the Due Soon and Overdue buckets are always empty. **Explanation:** To be addressed in a future release.
SM User role - Reports, dashboards and utilities accessible in Explorer [TFS 27201]	**Symptom:** In Explorer, the Strategy Management User role can view various SM reports, dashboards, and utilities. The SM User role should not have access to these assets in the desktop clients. **Explanation:** To be addressed in a future release.
Dashboard Home Page - 'Committee Approval' stage name being truncated [TFS 28359]	**Symptom:** The text for the Committee Approval stage name is truncated in the 'Subscribed Initiatives' section on SM Home Page - Dashboard. **Explanation:** To be addressed in a future release.
Initiatives Template - Read-only version [TFS 25528]	**Symptom:** Most of the fields display as white text boxes, indicating they are read-only. The Comments fields on the Resourcing tab, however, display as light blue fields. Elsewhere in the system, light blue fields are often used to indicate text entry. **Explanation:** To be addressed in a future release.

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2018.4 Release Notes** for additional known issues that have a suite-wide impact.