Release Notes

Axiom Strategy Management

Version 2019.1

KaufmanHall AXIOM

KaufmanHall

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Summary

Kaufman Hall is pleased to announce the 2019.1 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 Client Success 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 2019.1 version of Axiom Strategy Management, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, and remediated defects.
- 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.

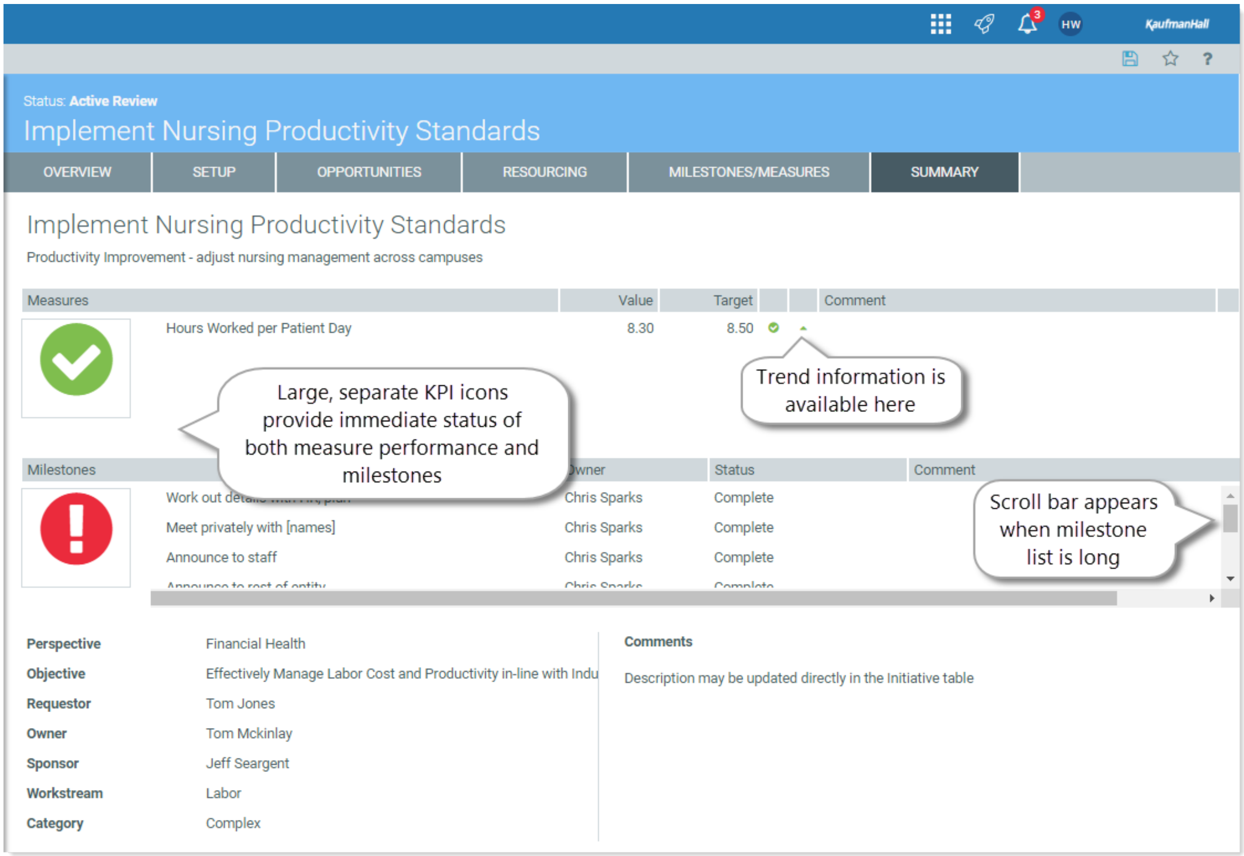
New features summary

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

Redesigned Initiative plan file Summary tab

We have improved the Initiative plan file page Summary tab to make it easier to see important information quickly. The redesign includes:

- Measures and Milestone sections were moved to more prominent position, above the list of user roles
- Measures section now has large KPI icon displaying measure performance for the current period
- If there is no measure data or milestones, “No Status” displays instead of a KPI icon
- Measure trend information is available on right side of Measure section
- Milestones section also has large KPI icon displaying milestone status
- Milestone section lists each milestone and its status, plus any comments
- General Comments section moved to lower right of page
- Related Perspective and Objective, Requestor, Owner, Sponsor, and other information is listed vertically down left side of page instead of horizontally across, so the information is easier to scan



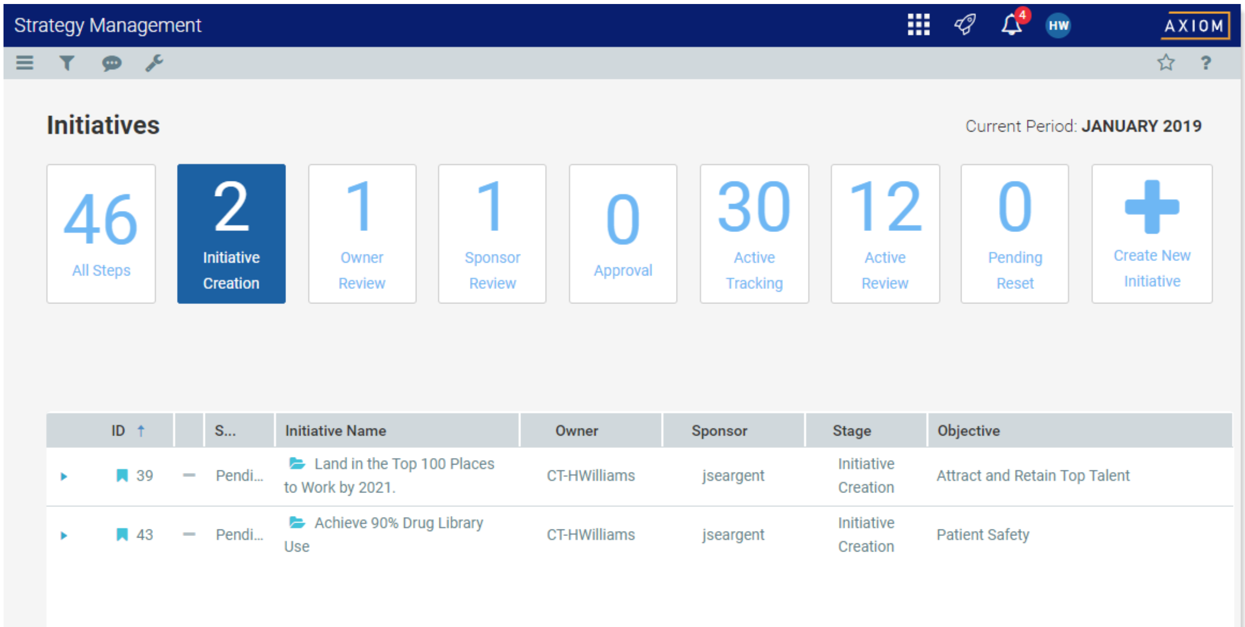
For more information on how Initiative milestone status is determined and which KPI icons display, see the section *Milestone status* in “About Initiative milestones” in the online help.

For more information about Initiative plan files, see “About Initiative plan file pages” in the online help.

Initiatives page tiles filter the Initiatives list

The Stage tiles at the top of the Initiatives page now filter the Initiatives list when clicked.

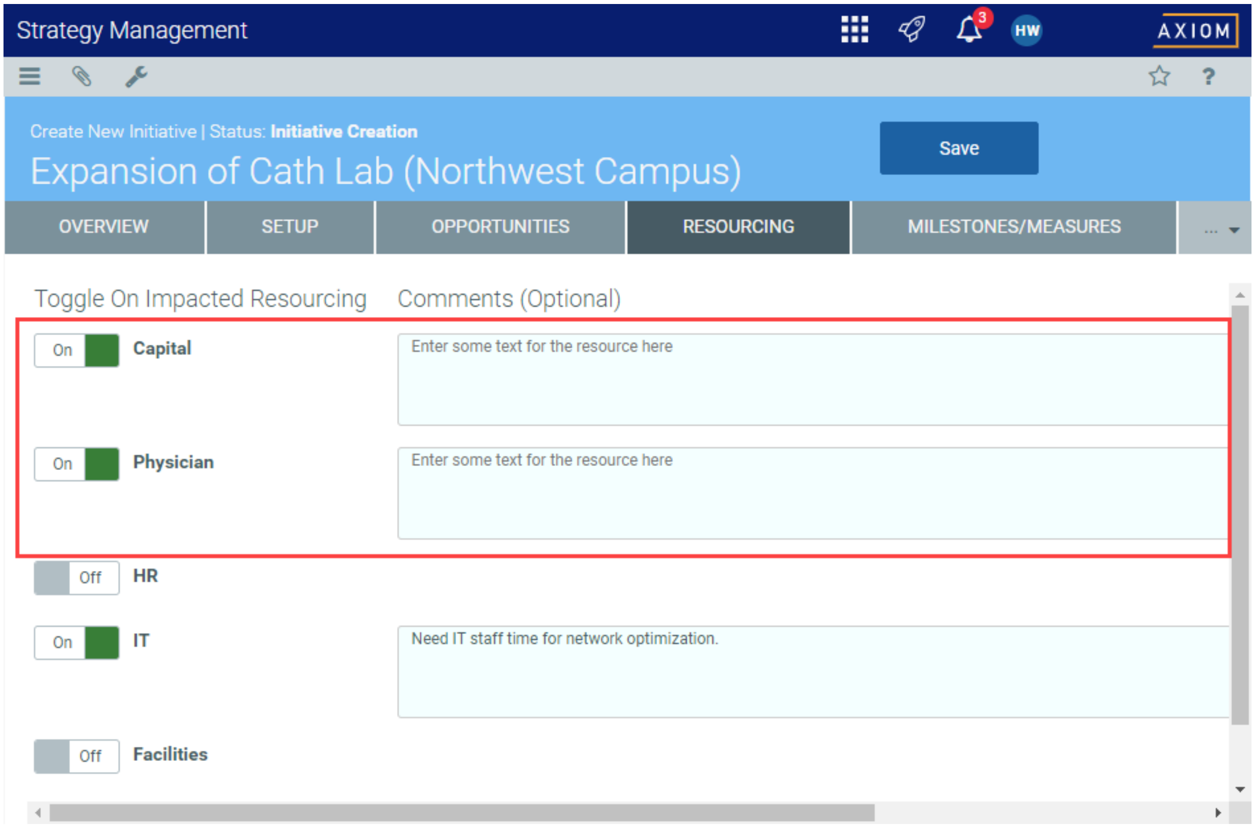
To filter the list for Initiatives in a particular stage, click the tile representing the number of Initiatives in that stage.



For more information, see "About the Initiatives page" in the online help.

Removed duplicate resources from the Initiative plan file template

The Initiative plan file page Setup tab no longer contains toggles for selecting physician and capital resources when creating Initiatives. These items were redundant with those available on the Resourcing tab (see following screenshot). In the plan file template, the Resourcing tab is now the only place where Initiative creators set resources for Initiatives.

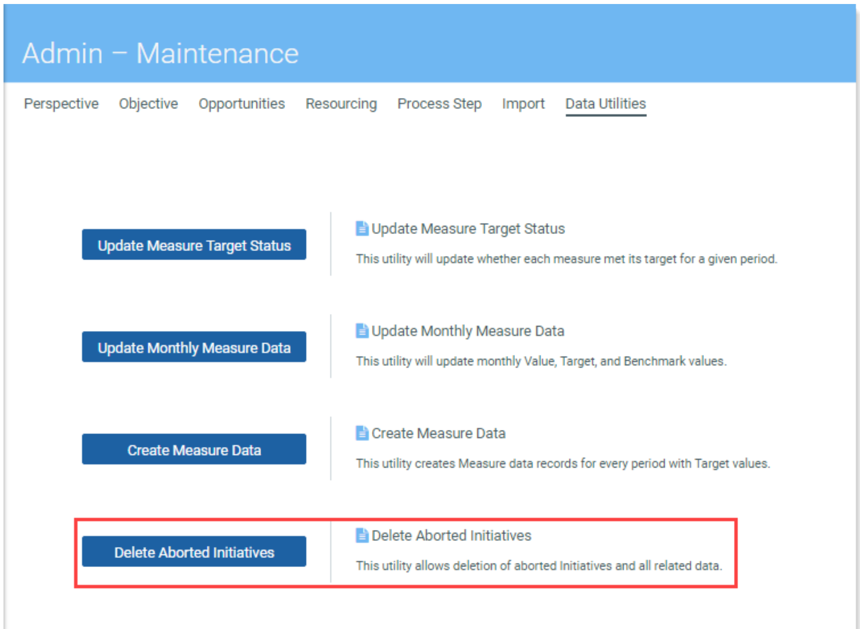


Initiative plan file Resourcing tab

For information on creating Initiatives, see "Create an Initiative" in the online help.

New utility deletes aborted Initiatives

Occasionally, Initiatives are aborted by users before they make it to Active Tracking. Since these Initiatives were usually created in error or not used, they need to be removed from the system. A new data utility allows Strategy Management administrators to remove these Initiatives and all of their related data from the Axiom Strategy Management system.



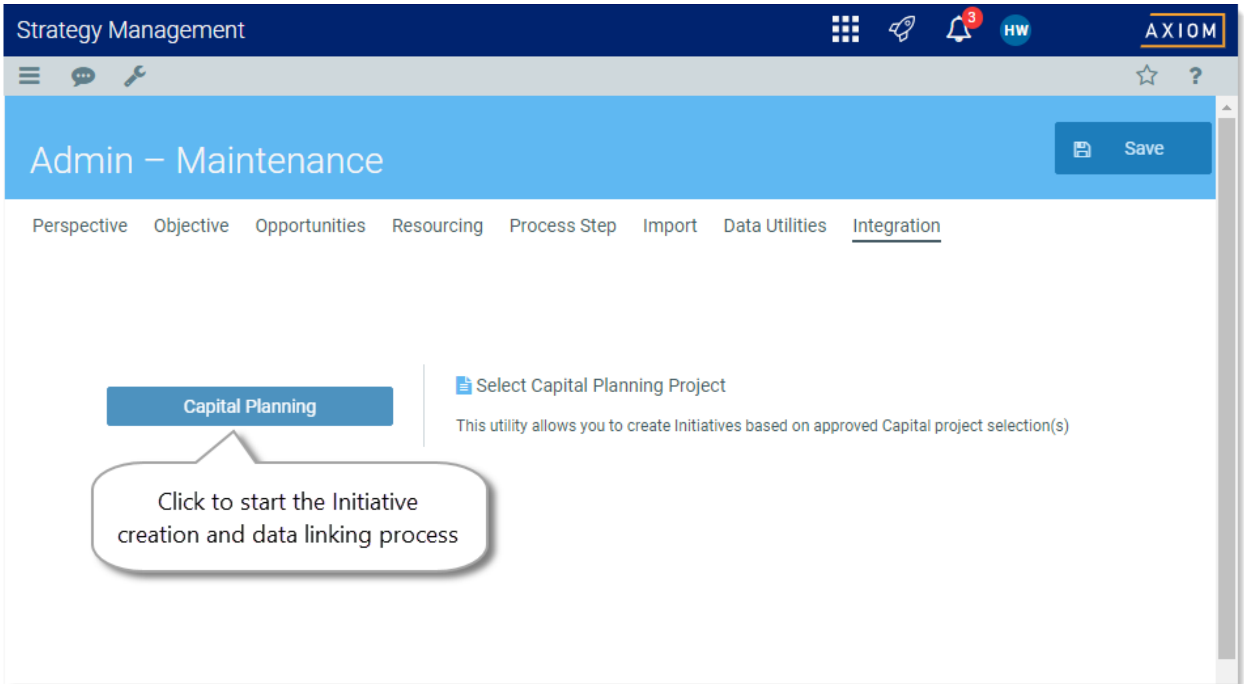
Location of new Delete Aborted Initiatives utility

For more information, see “Delete aborted Initiatives” in the online help.

New utility creates Initiatives from Axiom Capital Planning data

A new integration utility enables Axiom Strategy Management administrators to create Strategy Management Initiatives from imported Axiom Capital Planning data in the Web Client.

> **NOTE:** Axiom Strategy Management administrators need to have the Initiative Creator role and a Capital Planning role to use the utility.



For Axiom Strategy Management systems integrated with Axiom Capital Planning , the Capital Planning utility:

- Prompts you to select an Axiom Capital Planning source file group from a specific year
- Prompts you to select a capital requisition for the plan year you selected
- Prompts you to complete the Generate a New Initiative Request dialog
- Creates an Axiom Strategy Management Initiative based on your selections and opens the new Initiative's plan file page where you can continue configuring the Initiative
- Automatically adds an Initiative measure based on a selected Capital Planning requisition (modeled after the Capital Copy Utility in CP).

For more information, see "Create Initiatives from Capital Planning data" in the online help.

Issues resolved in 2019.1

The following table lists the resolutions for issues addressed in 2019.1, released on April 1, 2019:

Issue Description	Description
Measure Update Form - Aborted and completed initiatives available for selection [TFS 22837]	**Summary:** Aborted and completed initiatives are available for selection in the Select an Initiative dropdown. **Resolution:** Corrected by making filter options filter out aborted Initiatives and completed plan files.
Measure Update Form - 'Leave this page' dialog displays despite link opening new tab [TFS 25304]	**Summary:** 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. **Resolution:** Corrected by adding functionality to enable save for the Measure Update form and adding logic to verify whether or not unsaved changes are present in the form. The dialog displays only when there are unsaved changes.
Dashboard Home Page - Initiative Process Summary displays sections based on due dates, which are not currently used [TFS 25895]	**Summary:** 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. **Resolution:** Corrected by removing Due Soon and Overdue tasks because those items are not currently in use.
SM User role - Reports, dashboards and utilities accessible in Explorer [TFS 27201]	**Summary:** 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. **Resolution:** Corrected by removing SM User role access to Reports and Home Pages in the Desktop Client.

Issue Description	Description
Objectives Home Page - Owner values truncated at ~10 characters [TFS 27766]	**Summary:** Values in the Owner column on SM Home Page - Objectives appear to be cutting off at ~10 characters. **Resolution:** Corrected by adding a tool tip on mouse over.
Dashboard Home Page - Descriptions for aborted initiatives display in 'Subscribed Initiatives' section [TFS 28356]	**Summary:** Descriptions for aborted initiatives display in the Subscribed Initiatives section. They may be misread as secondary descriptions for active Initiatives. **Resolution:** Corrected by changing the query filter so that aborted Initiatives do not display in the Subscribed Initiatives section.
Dashboard Home Page - 'Committee Approval' stage name being truncated [TFS 28359]	**Summary:** The text for the Committee Approval stage name is truncated in the 'Subscribed Initiatives' section on SM Home Page - Dashboard. **Resolution:** Corrected by expanding the column width.
No results returned when search executed in 'Open Plan Files' dialog [TFS 28406]	**Summary:** No results are returned when a user runs a search in the “Open Plan Files” dialog for the Strategy Management - Requests file group. **Resolution:** Resolved in the platform software.
Measures Utility - Tooltips reflect previous values until save occurs [TFS 28433]	**Summary:** 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. **Resolution:** Corrected by updating the code so that the updated tooltip displays when the user clicks or tabs out of the field.
Initiatives Template - Error if user attempts to delete non-default milestone before initiative save [TFS 28967]	**Summary:** If a user attempts to delete an unsaved, non-default milestone before the initiative has been saved, the system displays an error. **Resolution:** Corrected by updating the delete tag logic.

Issue Description	Description
Initiative Creation Dialog - Objective field not cleared when perspective changed [TFS 29316]	**Summary:** 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. **Resolution:** Corrected by making changes to the code in the Setup sheet to clear selected values.

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
Measure Update Form - Paste icon does not 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.
Measure Update Form - 'Edit in Spreadsheet' values do not display in form until refresh [TFS 23525]	**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.
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.
Web Client Nav Pane - Menu items do not 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.
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.
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.

Issue	Description
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 - No results returned if user scrolls, then runs search where number of matches does not 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.
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.
CP to SM Integration - CAPREQs are not available for selection if already transferred for different year's file groups [TFS 34099]	**Symptom:** When a user transfers a CAPREQ for one file group, if they look at the CAPREQ selections for a different file group, the CAPREQ that has the same ID is not available for selection. **Explanation:** This issue will be fixed in the 2019.2 release. In the interim, clients need to have Client Success handle the resolution. This only affects clients who are upgrading.

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2019.1 Release Notes** for additional known issues that have a suite-wide impact.