Release Notes
Axiom Strategy Management
Version 2019.2.1

KaufmanHall

AXIOM

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Version: 2019.2.1

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Summary

Kaufman Hall is pleased to announce the 2019.2.1 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.

Client Success

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

> **IMPORTANT:** **You must apply the Axiom Software 2019.2 upgrade before applying any 2019.2 Axiom product upgrades.** Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2019.2 before the first product upgrade. Refer to the **Axiom Software 2019.2 Release Notes** and **Axiom Healthcare Suite 2019.2 Release Notes** for considerations before upgrading.

When upgrading to the 2019.2.1 version of Axiom Axiom, 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.
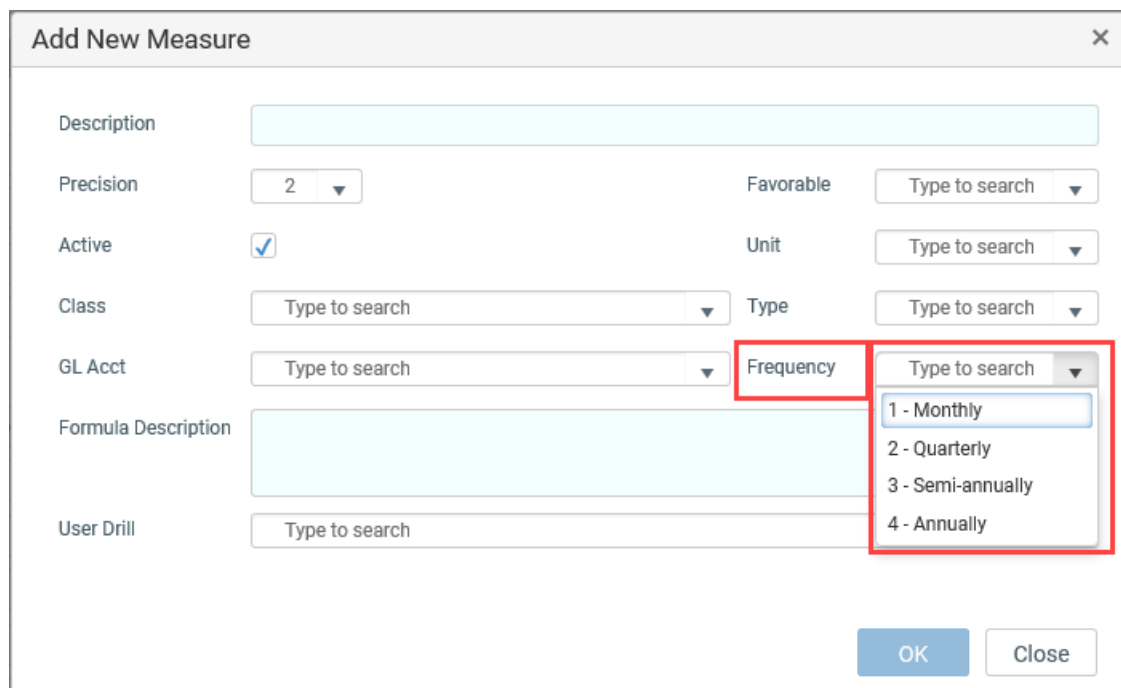
New measure frequency functionality

When you create a measure, you select the frequency at which it is to be monitored and updated. Previous to the 2019.2 release, you could select Monthly, Quarterly, Semi-annually, or Annually for frequency, but only monthly frequency was tied to tracking logic. Now, in addition to monthly, the other frequencies are tied to tracking logic.

> **IMPORTANT:** You cannot change a measure's frequency once you have set it and saved the measure.

This flexibility is necessary for updating and monitoring measures that are not tracked on a monthly basis; otherwise, reporting for such measures could be inaccurate if the system expects those measures to have data for a given month and they do not.

Other-than-monthly frequencies are also needed for systems integrated with other Axiom software products when those systems use quarterly, semi-annual, or annual time periods for their data.

For more information, see "Add a measure" in the online help.

▶ Frequency prefix for new measure names

When a new measure is created and saved, the name is prefixed with the frequency abbreviation and a dash:

- Monthly: MTH–[measure name]
- Quarterly: QRT–[measure name]
- Semi-annual: SA–[measure name]
- Annual: AN–[measure name]

The following example shows three Objective measures with quarterly frequencies.

Objectives

Earn Industry Leading Patient Satisfaction & Exper...

	Measure ↑		Measure Description
📊	837	✅ ▲	QTR-AHRQ Patient Safety Indicator Composite (Serious Complications)
📊	842	🗃 —	QTR-Composite HCAHPS-Cleanliness
📊	849	✅ ▼	QTR-Composite HCAHPS-Overall Hospital Rating

NOTE: If your organization does not want measure names to have frequency prefixes, the administrator can edit the names.

For more information, see the following in the online help:

- "Add a measure"
- "Edit or delete a measure"

▶ KPI trend icons update based on measure data and frequency

On the Dashboard, Perspectives page, and Objectives page, KPI trend icons are updated according to the frequency of the measure they represent.

Hierarchy Measure	Icon type	Updates based on...
Perspective & Objective measures	Performance	Measure data
	Trend	Past measure data + current measure data + frequency
Initiative measures	Performance	Milestones
	Trend*	Past measure data + current measure data + frequency

*Trend icons for Initiatives display in plan files only.

For more information, see "Key Performance Indicator icons" in the online help.

▶ Set measure frequency for Axiom Capital Planning Initiative measures

The ability to select a frequency has been added to the Initiative creation process for Initiatives created from imported Axiom Capital Planning data.

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

Set measure target direction in the Web Client

When creating measures, Axiom Strategy Management administrators can now set the MeetsTargetDirection attribute directly in the Add New Measure dialog instead of in the Measure table from the Desktop Client.

Administrators select the favorable target direction from the Favorable drop-down:

For more information, see "Add a measure" in the online help.

New utility deletes orphaned measure data

Axiom Strategy Management administrators now have a way to clean up orphaned data records that result from changes to the hierarchy measure tables. Removing leftover data prevents reports from displaying measure targets that were deleted because either a mistake or change was made in the original time frame for the measure, or changes affecting the data were made in the plan file.
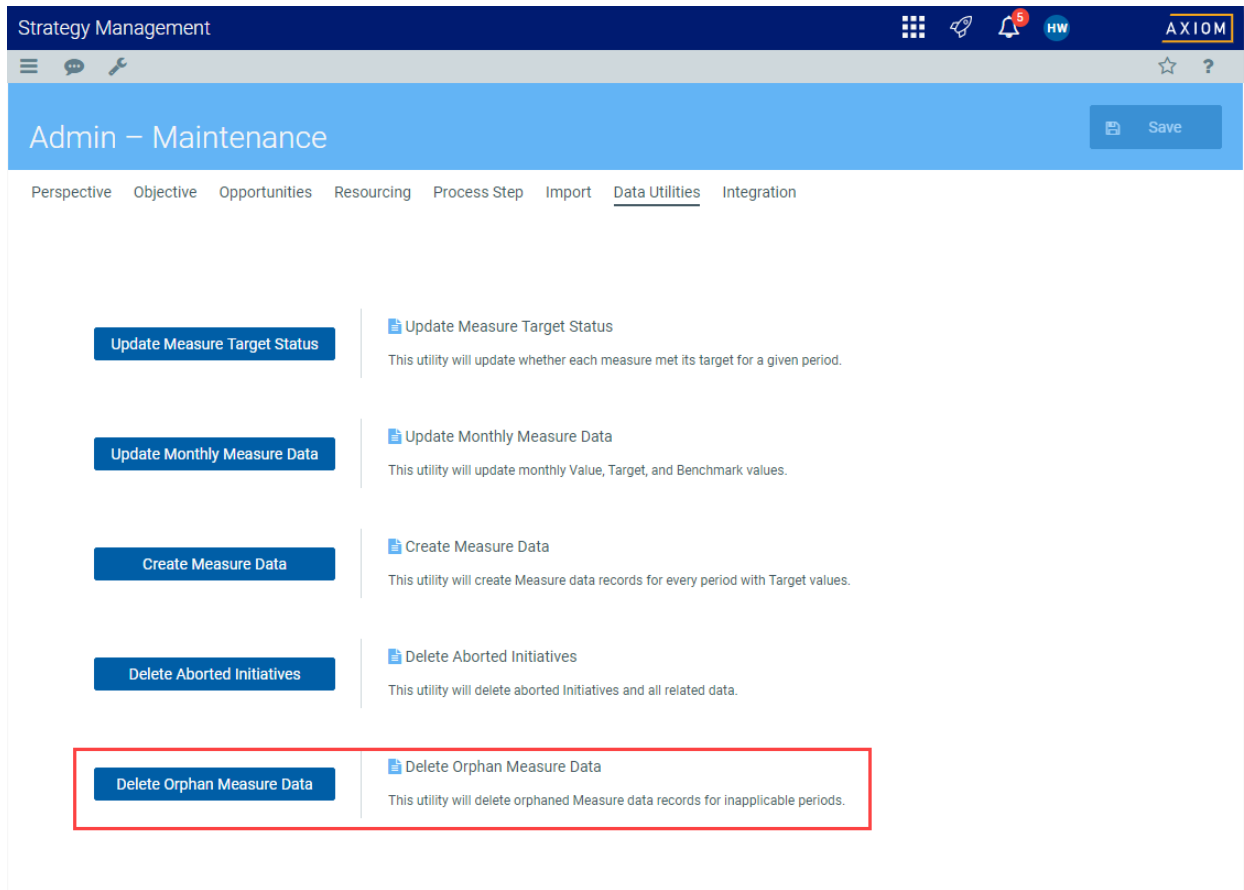
For more information, see "Delete orphaned measure data" in the online help.

Set decimal value length displayed in Measure Detail windows

When creating measures, Axiom Strategy Management administrators can now select the number of decimal values that display for measure data in Measure Detail windows.
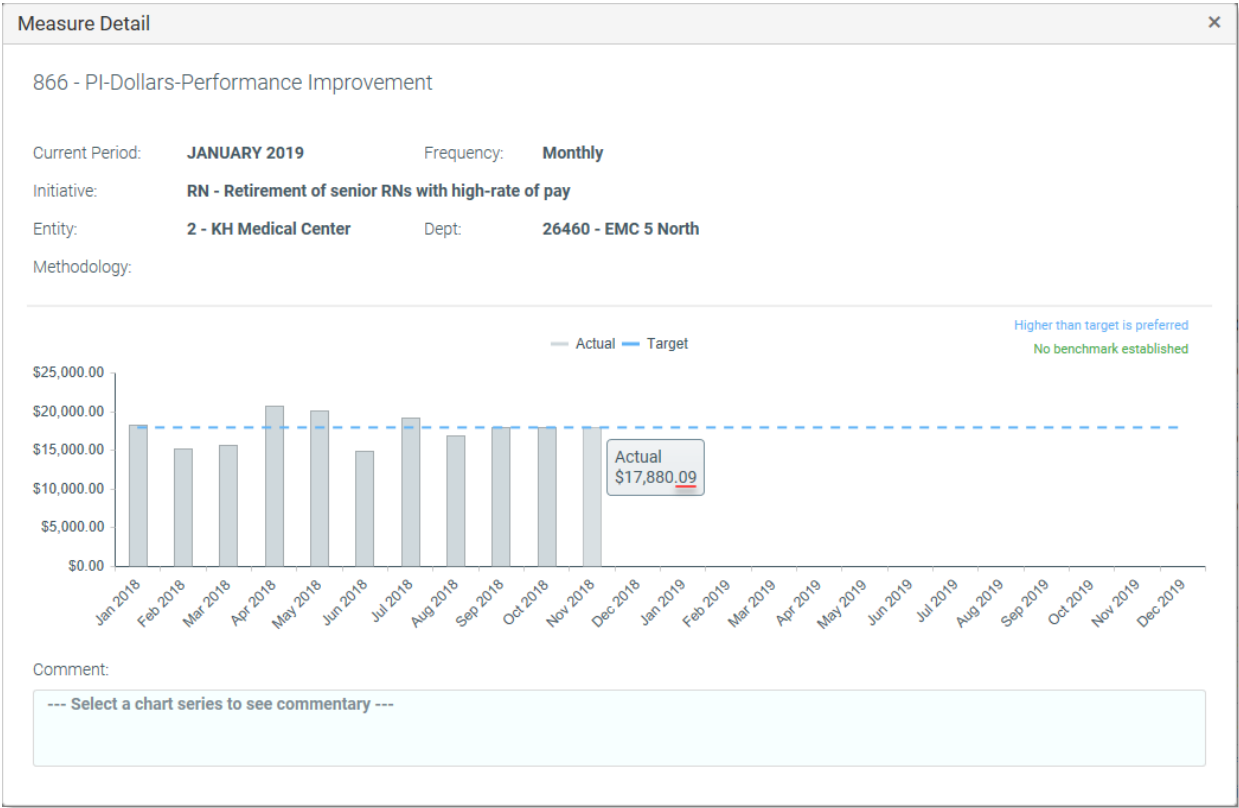
When creating a measure, you select the number of decimal values from the Precision drop-down.

The default number of decimal values depends on where the measure value originated:

- The general default value is two decimal places.
- If the measure comes from Axiom Capital Planning and Axiom Capital Tracking integrations the default is zero decimal places.
- If the measure comes from Axiom Comparative Analytics, the default is two decimal places.

For more information, see the following in the online help:

- "Add a measure"
- "Edit or delete a measure"

Issues resolved in 2019.2

The following table lists the resolutions for issues addressed in 2019.2, released on June 24, 2019:

Issue Description	Description
Initiative Status Report, Cost Reduction Status Report - Completed and aborted initiatives display [TFS 30914]	**Summary:** Completed and aborted Initiatives are displaying in the Initiative Status and Cost Reduction Status reports. **Resolution:** Corrected by filtering the completed and aborted initiatives from the Initiatives home page.
Initiatives Template - Opportunity comment may be truncated when initiative is in last three stages [TFS 32868]	**Summary:** When a user enters a long comment (150 - 250 characters) for an opportunity, the end of the comment is cut off when the plan file is in the Active Tracking, Active Review, and Pending Reset stages. **Resolution:** Corrected by adding text wrapping to the format tag to the applicable table columns and field.
Initiative milestone status resets back to On Track when Current Period changes. [TFS 33510]	**Summary:** Milestone status and associated comments are not being retained from Current Period to Current Period. **Resolution:** Corrected by adding logic that returns the status and comments from the most recent period.
Measure Update Form - 'March 2018' hard-coded as default value for Individual Period selection [TFS 34421]	**Summary:** Individual Period selection on the Measure Update form is hard-coded to "March 2018." **Resolution:** Corrected by clearing the default drop-down option.
Initiatives template - Percent and amount values not formatted on Milestones/Measures tab for initiatives in last two stages [TFS 34842]	**Summary:** The measure data numbers that display in the 'Value' column on the Milestones/Measures tab for initiatives in the last two stages (Active Review, Pending Reset) are not being formatted per their measure unit. **Resolution:** Corrected the formatting so that the numbers in the Value column are formatted per the measure data type.
When creating new Measure if Class filter does not match the new Measure's Class it looks like it never was created [TFS 34852]	**Summary:** When opening the Admin-Measures page and immediately adding a new measure, when the user clicks OK, the measures do not display in the list. **Resolution:** Corrected by making the Class filter update to show ALL classes as the default.

Issue Description	Description
Perspectives Home Page - Objectives section has very limited real estate when large number of perspective measures exist [TFS 35170]	**Summary:** When a Perspective has a large number of Perspective measures, there is not enough room for the Objectives section to display on the page. **Resolution:** Corrected by editing the form so that the sections are more evenly spaced.
SM Measures the Class Filter drop down is broken [TFS 36320]	**Summary:** When users have a large number of active measures, the Class Filter drop-down on the Admin-Measures page does not work. **Resolution:** Corrected by turning off certain Axiom Queries and some component source tags that interfered if the drop-down contents went beyond 500 items.

Issues resolved in 2019.2.1

The following table lists the resolutions for issues addressed in 2019.2.1, released on July 22, 2019:

Issue Description	Description
Perspective Detail Drill: There is no filter on Lists! AQ3 - Objectives for Active=1 (2019.2) [TFS 36937]	**Summary:** When unfiltered Objectives are brought in to the Perspective Detail drill, they cause a mismatch in the numbers in the chart. **Resolution:** Corrected by updating the filter for Lists! AQ3 on the Control Sheet so that only active Objectives are brought in through the query.

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.

> **IMPORTANT:** Refer to the **Axiom for Healthcare Suite 2019.2 Release Notes** for additional known issues that have a suite-wide impact.