Release Notes
Axiom Strategy Management
Version 2019.4

KaufmanHall
AXIOM

KaufmanHall

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Summary

Kaufman Hall is pleased to announce the 2019.4 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. **Complete manual updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

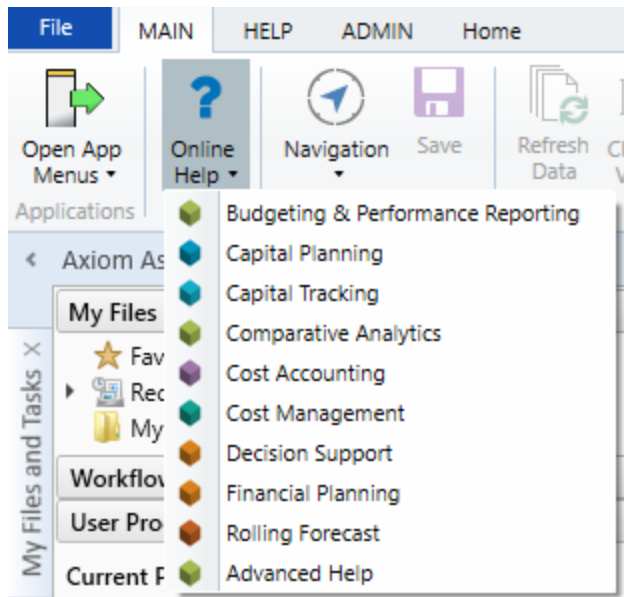**Escalating to Axiom Support**

As always, we appreciate your commitment to Kaufman Hall. If you have any questions about your upgrade, please contact us by logging into Axiom, navigating to the online help for your product, and clicking the **Axiom Support** link at the top of the home page.

Help and Training

Kaufman Hall provides world-class resources at your fingertips directly within the Axiom Software system. Axiom Help provides topics, knowledge base articles, documents, webinar/training announcements, and videos to guide you through managing your system. To access these resources, do any of the following:

- **Online help** - From the Main, Help, or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window.

> **NOTE:** The online help will only open for products you are licensed to use.

- **Contextual help** - Form/web-enabled features include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right corner of the screen. For more detailed information, open Axiom Help by clicking **Open Help** at the top of the contextual help dialog.

Product upgrade notes

> **IMPORTANT: You must apply the Axiom Software 2019.4 upgrade before applying any 2019.4 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 2019.4 before the first product upgrade. Refer to the **Axiom Software 2019.4 Release Notes** and **Axiom Healthcare Suite 2019.4 Release Notes** for considerations before upgrading.

When upgrading to the 2019.4 version of Axiom Strategy Management, keep in mind the following:
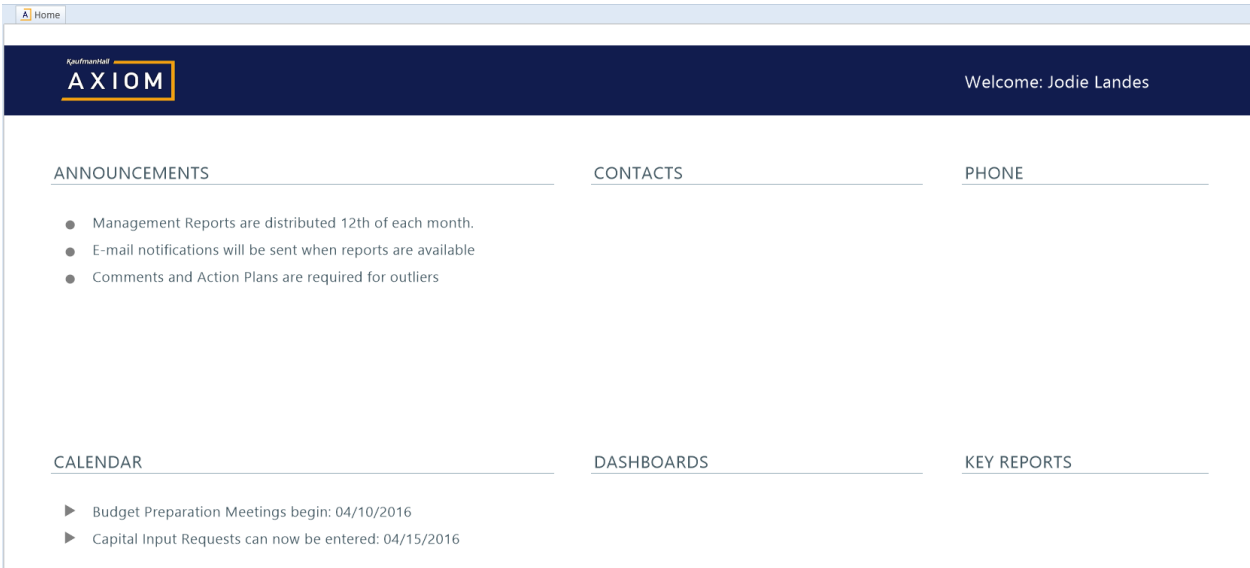
- This product upgrade contains updated templates, calculation methods, and remediated defects.
- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered 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 Home page for Windows and Excel clients

The default home page used in the Windows and Excel clients has been updated with the current Axiom logo and a new look-and-feel.

Issues resolved in 2019.4

The following table lists the resolutions for issues addressed in 2019.4, released on December 16, 2019:

Issue Description	Description
Perspectives Home Page - 'Measure' column header partially truncated [TFS 38089]	**Summary:** When a user launches the Perspective Home Page, the header for the Measure column may be truncated. Even if the entire word "Measure" is visible, an ellipsis displays. **Resolution:** Corrected by copying a correct column setup to the Measure column.
Measures utility - Performance may be poor in large systems due to Axiom.FileSystemInfo query [TFS 38757]	**Summary:** The Lists!AQ8 query pulls a list of files that live in the Strategy Management Drill folder. In large systems where clients are licensed for numerous Axiom products, this query can take a long time to execute. Even once loaded, the Measures utility is very slow. **Resolution:** Corrected by removing the link tag from the Save2Db row on the DrillAssets sheet, and by removing the FileName.
PFB-08022 - Invalid AQ filters on SM Home Page New Installs [TFS 38858]	**Summary:** On new installations of Strategy Management version 2019.2.2 (Platform version 2019.2.23), some pages (forms) have invalid Filters (!VALUE) in their Axiom Queries, which causes an error when the forms load. This error is related to there being no set Current Period set in Strategy Management. The error message is "Error refreshing Axiom Queries on sheet '[page or form name]'." Affected pages include Dashboard, Initiatives, Objectives, Perspectives, Measure Update Form, Initiative Status Report, Cost Reduction Status Report. **Resolution:** Corrected by replacing blanks in the queries with 0 where needed and by fixing cell formulas where needed.
Maintenance utility - Import instructions do not reflect OTIS record addition behavior [TFS 38933]	**Summary:** On the Import tab in the Maintenance utility, the note in Step 6 is no longer applicable. **Resolution:** Corrected by updating the note in Step 6 to fit the current software behavior.
The InitiativeMeasureData does not use the same Key column sequence as the other 2 tables [TFS 39098]	**Summary:** The InitiativeMeasureData table does not use the same key column sequence as the PerspectiveMeasureData and ObjectiveMeasureData tables. **Resolution:** Corrected by changing the column order in the InitiativeMeasureData table to match the other measure data tables.

Issue Description	Description
SM - Cannot add two milestones on one save in Initiative Plan File (19.4) [TFS 39892]	**Summary:** Within a plan file, if the user tries to add more than two milestones on one save action, the user receives a save error because the system is not giving both milestones a unique key. **Resolution:** Corrected by updating the code to count all calc method insertions and number them appropriately so that each one has a unique key.

Manual setup instructions

There are no manual setup tasks needed for this release.