Administrator's Guide

Axiom Comparative Analytics

Version 2019.4

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Version: 2019.3

Updated: 12/16/2019

Contents

Getting started

The purpose of this document to quickly assist you in understanding and assigning user roles for Axiom Comparative Analytics. This document is intended for use by anyone with a responsibility for managing security permissions in Axiom.

The Getting Started section provides information on the basics of using Axiom Comparative Analytics, such as:

- General system navigation and user interface
- Using spreadsheet plan files and report files from an end user perspective
- Using general Axiom spreadsheet file features such as views, snapshots, and printing
- Viewing data using web-friendly reporting tools such as Web Reports and Data Explorer

This section is intended for all users who are getting started with Axiom Comparative Analytics. For end users, this section provides an ongoing reference for file-related tasks.

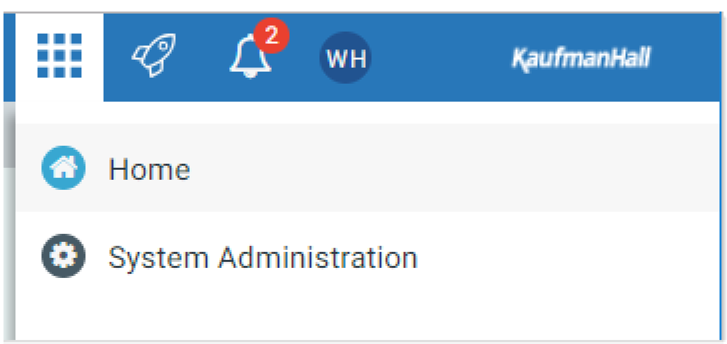
Home page

All users have a home page that opens automatically when you log into the Axiom Web Client. Depending on your system, this home page may be one of the following:

- A product-specific home page for an installed Axiom Comparative Analytics product
- A custom home page created specifically for your organization
- The default Axiom Comparative Analytics home page

If you have any questions about your home page, please contact your system administrator.

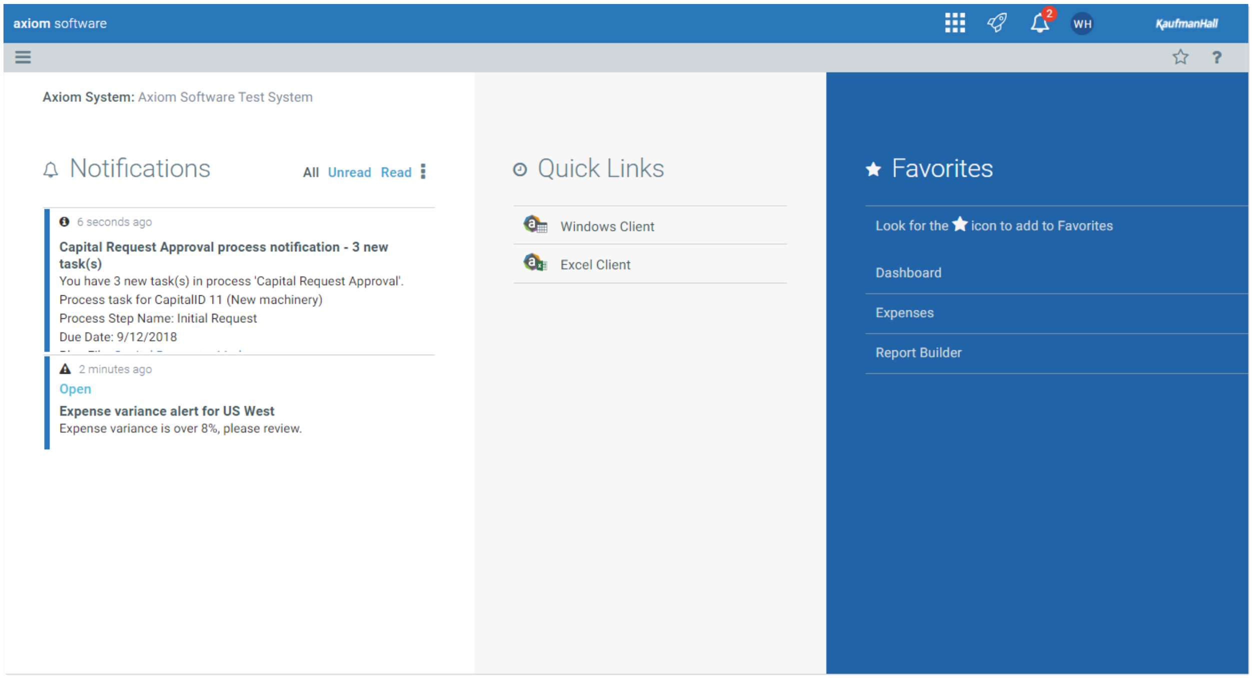
If you navigate away from the home page, you can return to it by using the Area menu in the Global Navigation Bar:



If you are in a system with installed products, this menu may contain product names instead of the **Home** item. In that case, you can select a product name to return to the home page for that product.

Default home page

If a user does not have an available web-enabled home page, then the default home page is used. The default home page displays notifications, favorites, and quick links.



This page can also be accessed (by any user) by going to the following URL:

Example On-Premise URL	`http://`*`ServerName`*`/Axiom/Home/Launchpage` Where *ServerName* is the name of the Axiom Application Server, and Axiom is the default name of the virtual directory.
Example Cloud System URL	`https://`*`CustomerName`*`.axiom.cloud/Home/Launchpage` Where *CustomerName* is the name of your cloud service system.

This page has the following features:

- **Notifications**: You can read and delete notifications using the same features available in the Notifications panel.
- **Quick Links**: You can use a set of global quick links that are displayed here for easy access. These links are built-in to the page and cannot be customized. However, the link to the Excel Client may not be present if your system has been configured to hide it.
- **Favorites**: You can open and delete web favorites.

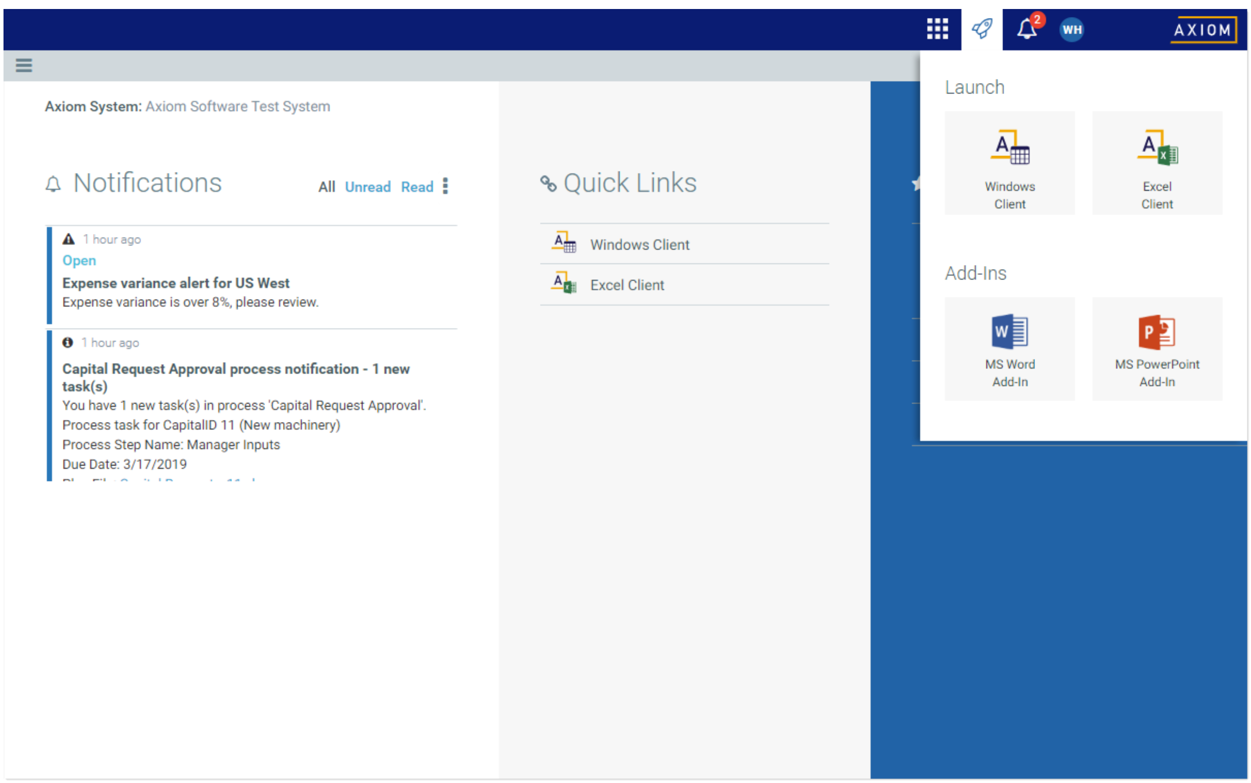
Launching Axiom Comparative Analytics applications

You can launch various Axiom Comparative Analytics applications from the Web Client Quick Launch menu, including the Axiom Excel Client and Axiom Windows Client.

The Quick Launch menu serves the following purposes:

- Users can install applications from this area as needed. Afterward, they can continue to launch installed applications from this location, or they can use other options (such as a shortcut on their desktop).
- For systems using SAML or OpenID authentication, this is the only option for users to launch installed applications. SAML and OpenID authentication require users to be authenticated using the Web Client before they can launch a desktop application.
- Users can install and launch add-ins such as the add-ins for Microsoft Office applications.

To open the Quick Launch menu, click the Quick Launch icon  in the Global Navigation Bar.



Quick Launch menu

Launching the Axiom Desktop Client

Using the Quick Launch menu, you can launch the Axiom Desktop Client. Click on one of the following icons:

Item	Description
Windows Client	Launches the Axiom Windows Client on your desktop.
Excel Client	Launches the Axiom Excel Client on your desktop. Requires Microsoft Excel. **NOTE:** This option may not display in the menu, in which case you should use the Windows Client as your desktop client.

If the client is not already installed on the current workstation, clicking the icon will initiate the install and then launch the client. If the client is already installed, clicking the link will launch the client. You must be using Microsoft Edge or Internet Explorer 11 (or higher) to perform these actions. Other browsers may be able to install and launch the client if a ClickOnce extension is applied to the browser.

The appropriate client to use depends on your organization's preferences and on your user role. Your organization will provide instruction as to which client you should use.

For more information on installing the Windows Client and Excel Client, including prerequisites and configuration details, see the Installation Guide (on-premise systems) or the Cloud Service Technical Guide (cloud service systems). Some software prerequisites can be downloaded and installed from the Web Client. You can access the prerequisites download page from the Axiom Comparative Analytics About box.

NOTE: The default home page also contains links to launch the Windows Client or the Excel Client.

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Launching add-ins

Using the Quick Launch menu, you can launch Axiom Comparative Analytics add-ins. Click on one of the following icons:

Item	Description
MS Word Add-In	Launches the Axiom Comparative Analytics Add-In for Microsoft Word.
MS PowerPoint Add-In	Launches the Axiom Comparative Analytics Add-In for Microsoft PowerPoint.

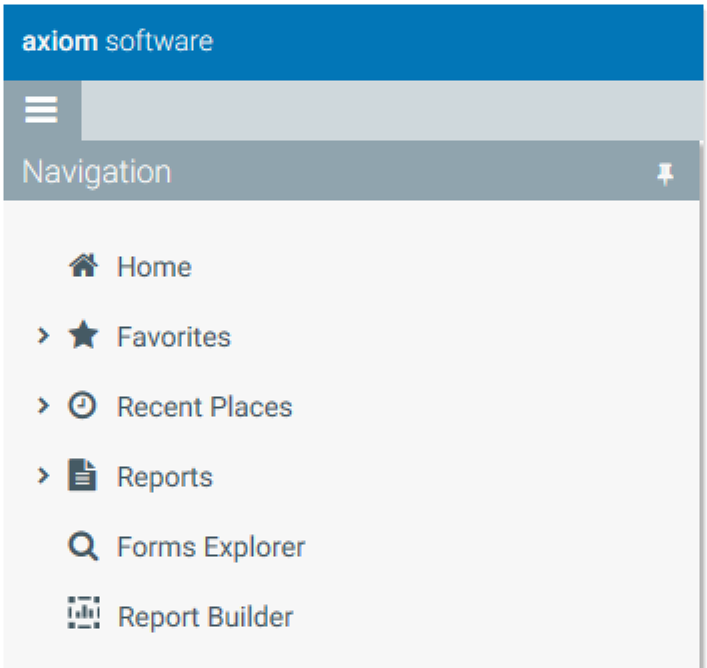
NOTE: One or both add-ins may not display in the menu, depending on your organization's preferences.

The Word and PowerPoint Add-ins are optional applications to support document integration between Axiom Comparative Analytics and Word or PowerPoint.

Navigation panel

Using the Navigation panel, you can navigate to your documents and to various areas of the Web Client.

To open the Navigation panel, click the menu icon in the left side of the gray task bar. To navigate to an area or document listed in the panel, click on the item.



Example Navigation panel

The Navigation panel updates dynamically to show the available navigation links for the currently active area of the Web Client. The following areas are available:

Area	Description
Default	Axiom Comparative Analytics provides a set of standard navigation links that show by default when you are in the Web Client. The previous screenshot shows the standard navigation links. These links provide access to your favorites, recent places, web-enabled reports and forms, and the Report Builder. The standard navigation links can be customized, so each customer's system may look different. Navigation links can only be customized by administrators using the Desktop Client. For more information on how to customize the panel, see Defining navigation links for the Web Client Navigation panel (Desktop Client Help).

Area	Description
System Administration	The system administration links show when you are in the System Administration area, and provide access to features such as the Table Manager, Audit Manager, and software updates. For more information, see System administration.
Product-Specific	Systems with installed products may have product-specific web navigation links. When you select a product name from the Area menu in the Global Navigation Bar., the product-specific links display in the Navigation panel. For more information, see the product-specific documentation.

Additionally, when you open a report or other browser-based document, that document may be associated with a set of document-specific navigation links. These links are added to the Navigation panel while you are in that document.

Viewing system information

Use the Axiom Software About box to see information about your current system, such as:
(missing or bad snippet)

The About box also contains a link to download software prerequisites, if necessary for installation of the Desktop Client.

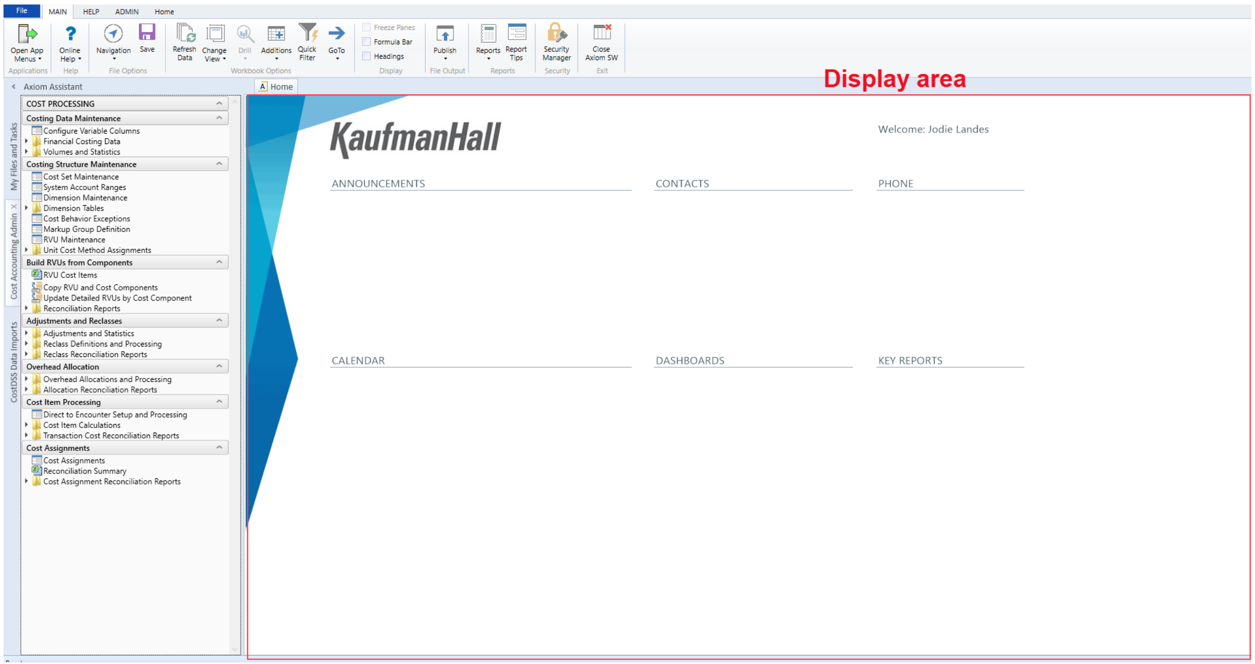
To open the About box:
(missing or bad snippet)

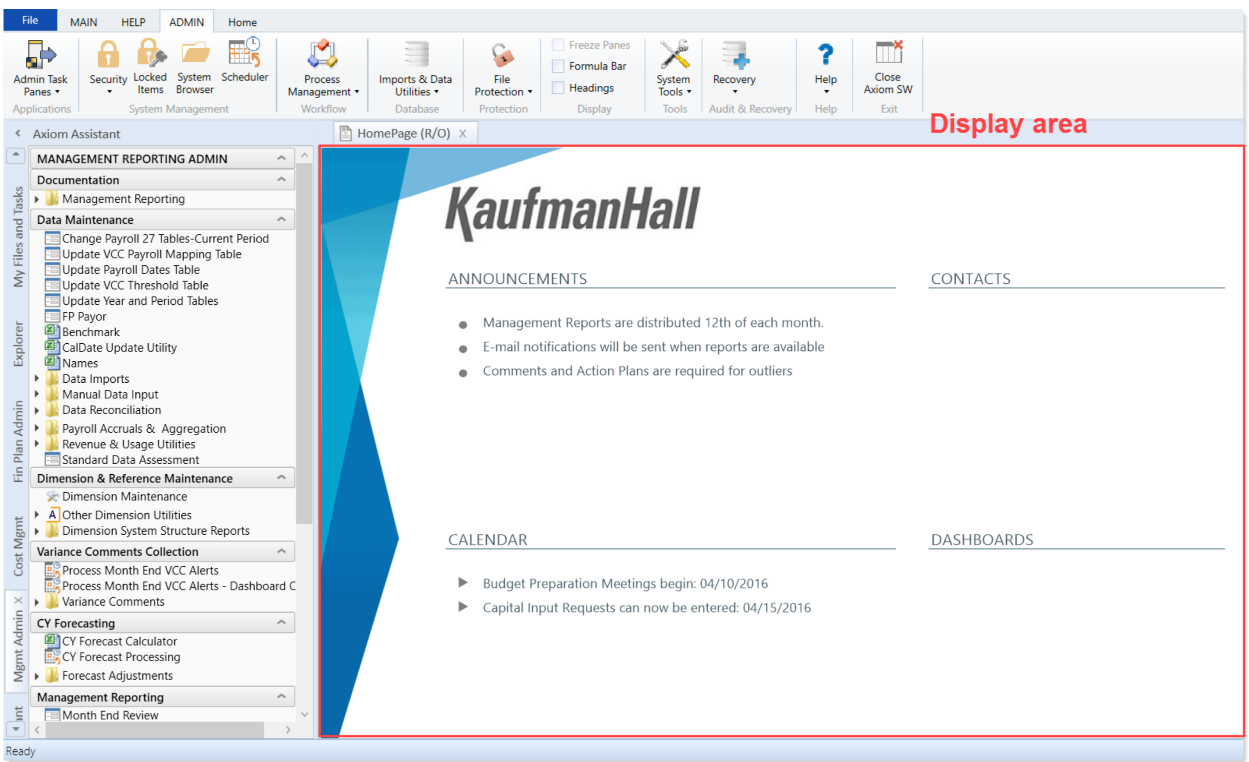
Getting to know the interface

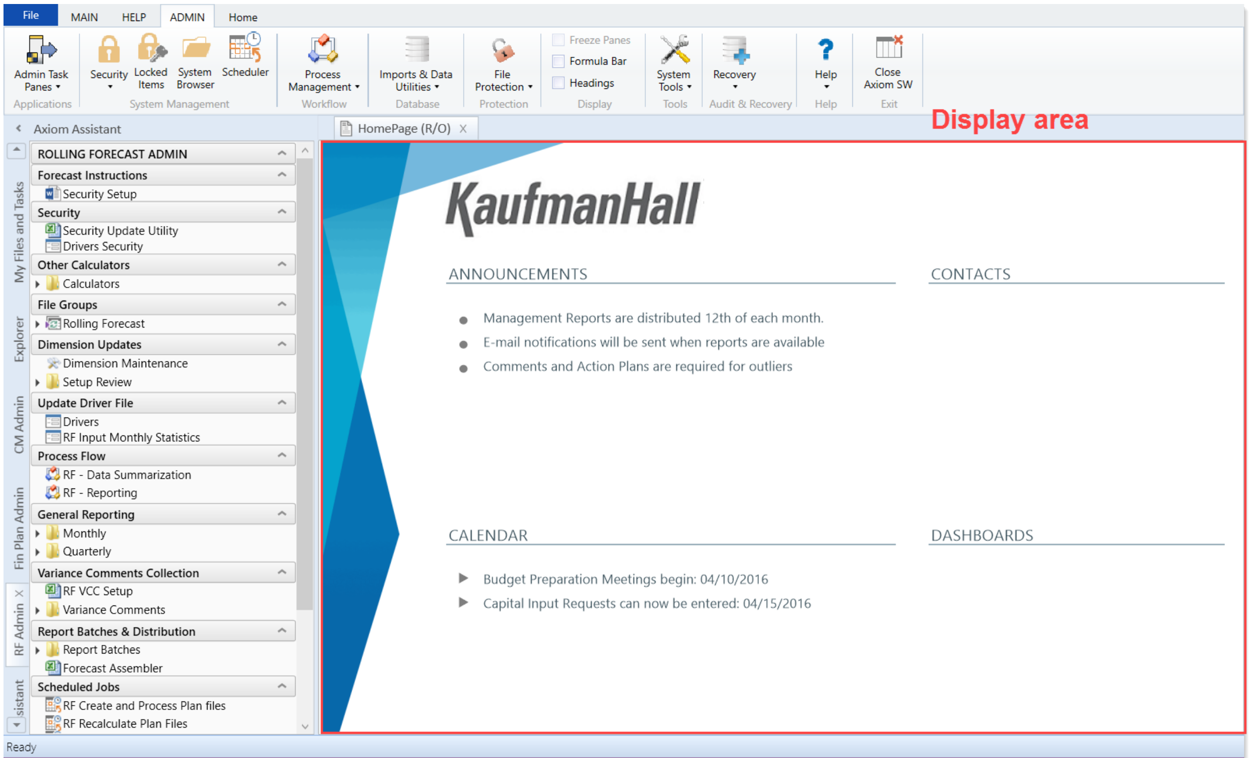
All Axiom Software products share a common interface and make use of many of the same features. The interface includes several sections, including:

Display area

The main display area displays the open files. By default, it shows the Kaufman Hall Home dashboard, which displays announcements, assigned tasks, links to dashboards, and contact information for administrators. Your Axiom Software product administrator configures the information that displays on this screen.

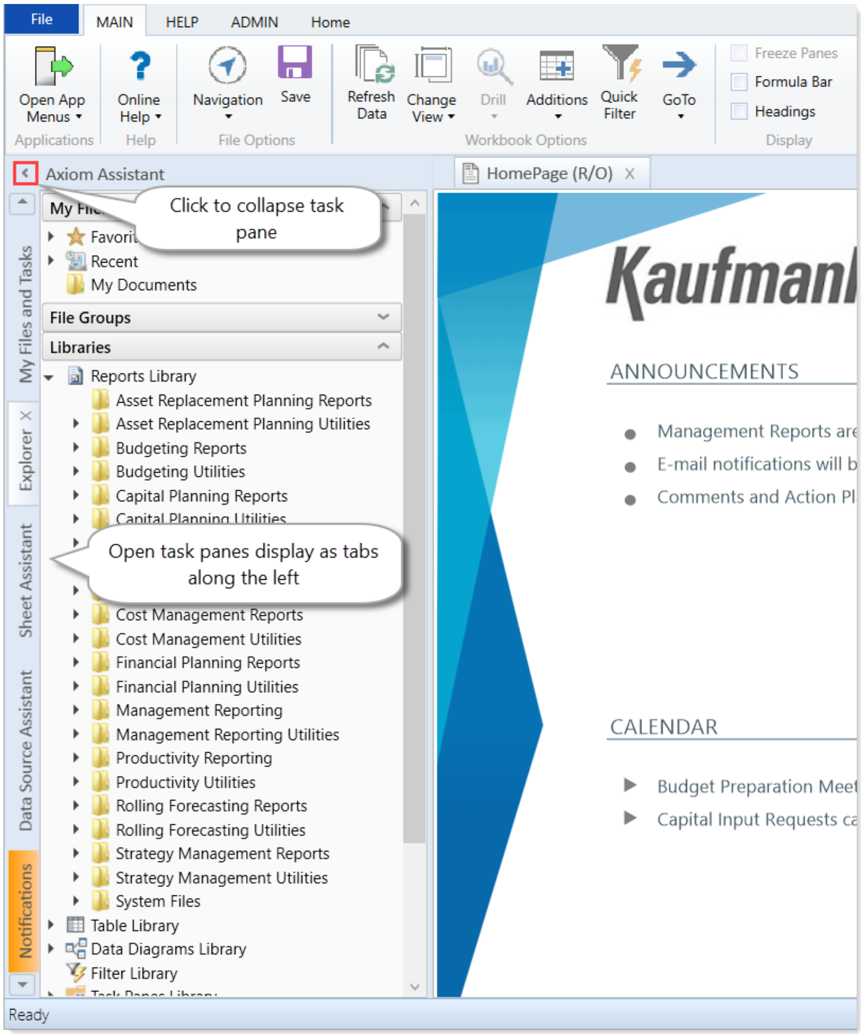




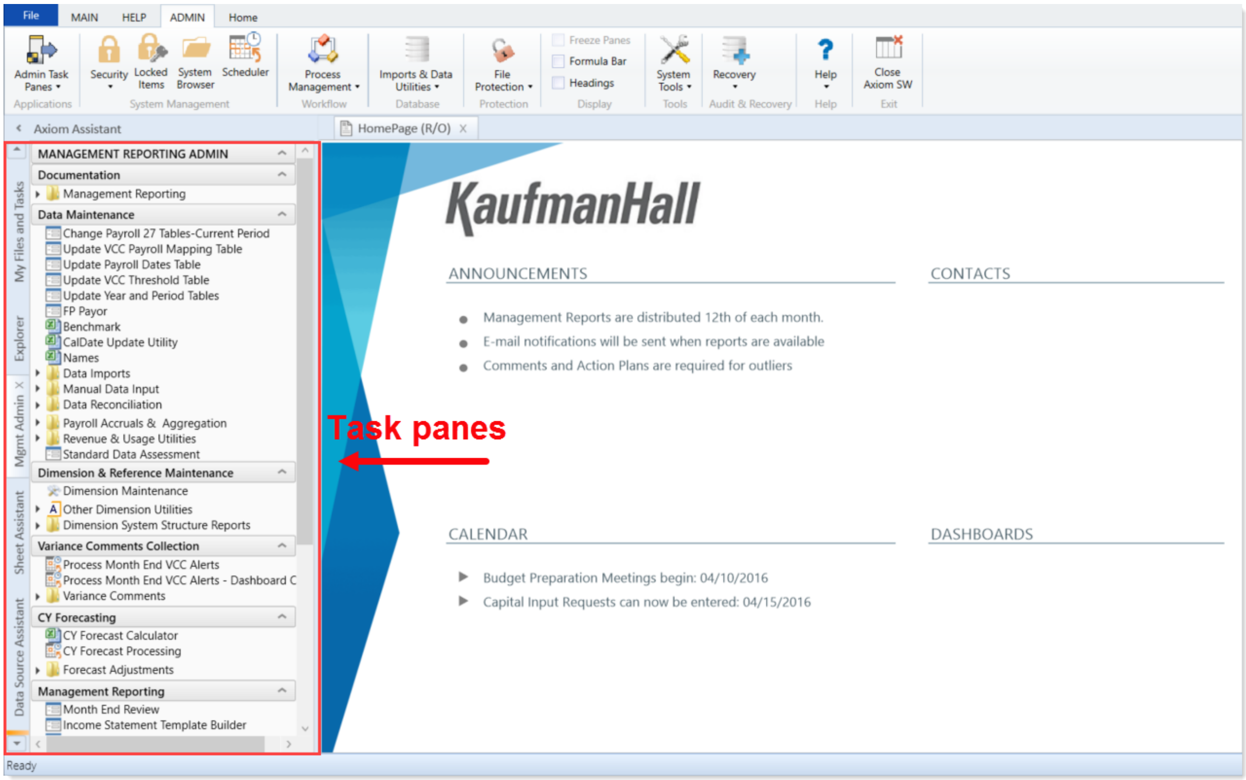


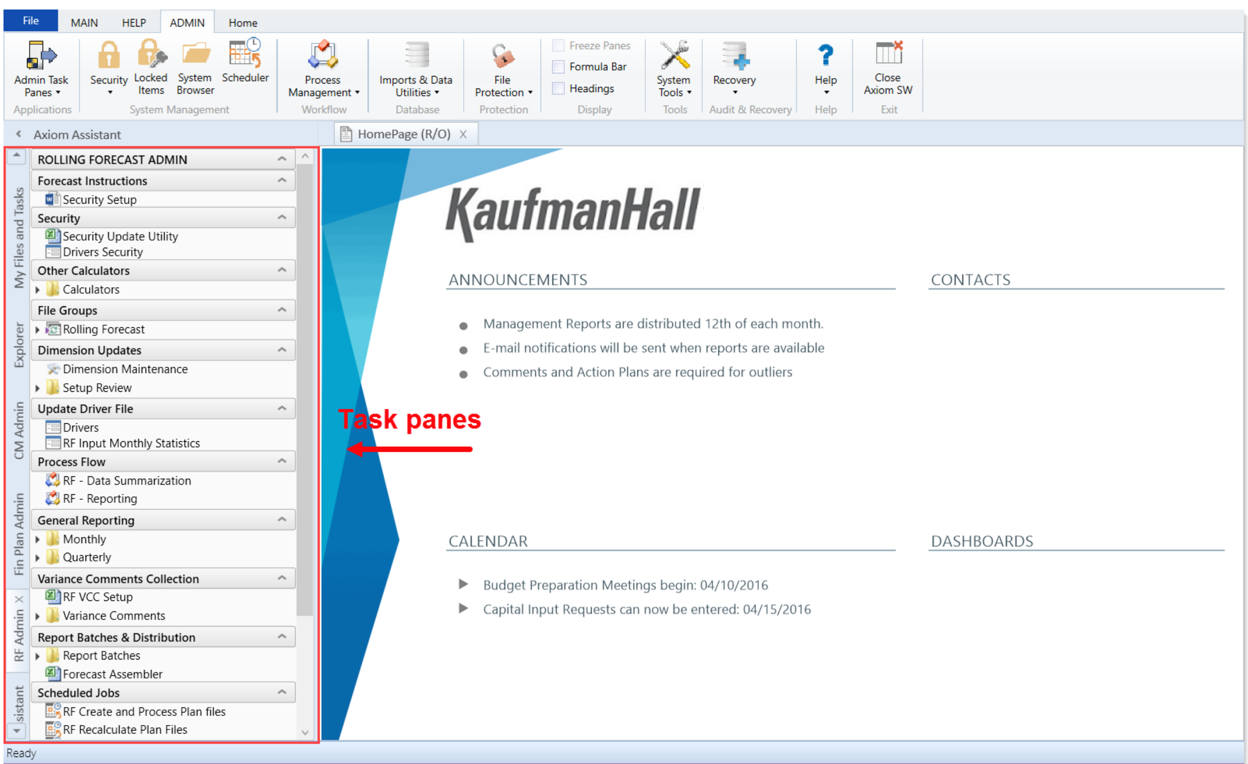
Task panes

A task pane provides access to commands, utilities, reports, plan files, and so on for Axiom Comparative Analytics, and displays on the left side of the main display area. To switch between task panes, click the tabs on the left side of the interface. To expand or collapse the task panes, click the arrow in the left-hand corner above the tabs.



Each Axiom Software product includes a set of specialized task panes. Different task panes display depending on your security role profile. The administrator role profile has access to all of the features of Axiom Comparative Analytics, including drivers, dimension tables, and other system administrator features while the end user task pane includes a subset of the options available in the Admin task pane.


Task panes
MANAGEMENT REPORTING ADMIN
KaufmanHall
ANNOUNCEMENTS
CONTACTS
Management Reports are distributed 12th of each month.
E-mail notifications will be sent when reports are available
Comments and Action Plans are required for outliers
CALENDAR
DASHBOARDS
Budget Preparation Meetings begin: 04/10/2016
Capital Input Requests can now be entered: 04/15/2016


Task panes
ROLLING FORECAST ADMIN
KaufmanHall
ANNOUNCEMENTS
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Management Reports are distributed 12th of each month.
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CALENDAR
DASHBOARDS
Budget Preparation Meetings begin: 04/10/2016
Capital Input Requests can now be entered: 04/15/2016

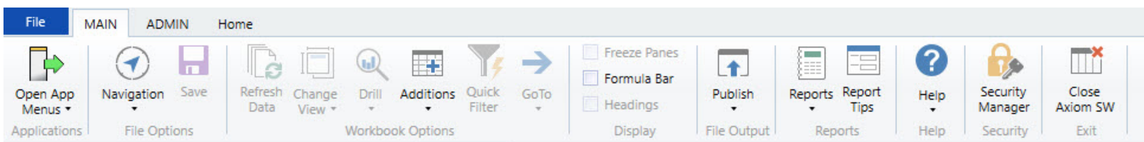
Ribbon tabs

Ribbon tabs provide access to commonly used features and shortcuts to frequently accessed files. They display above the task pane and main display areas. The role assigned to you determines the ribbon tabs that display. For example, the Admin ribbon tab only displays to those users assigned the Administrator role profile.

Main

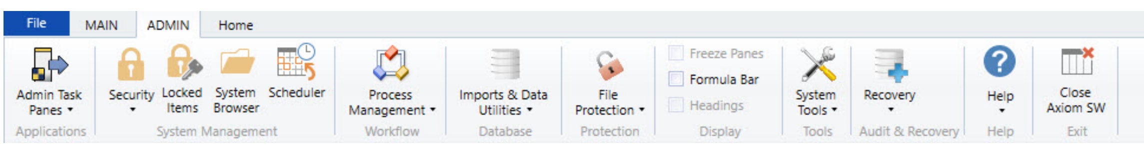
Includes commands for accomplishing most tasks in Axiom:

- Opening, closing, and saving files
- Viewing data in spreadsheets
- Printing or emailing files
- Accessing shortcuts to frequently accessed reports



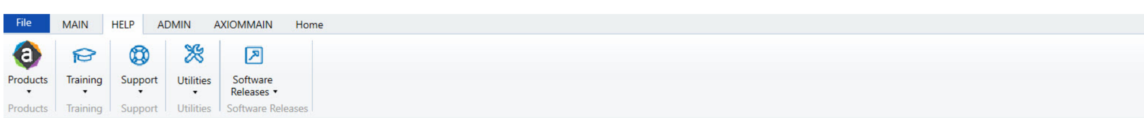
Admin

Includes commands for managing and configuring security, Scheduler jobs, processes, and data as well as other system-related tools used by administrators. This ribbon tab only displays to users with administrator privileges.



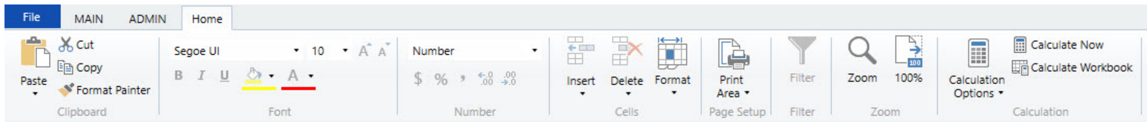
Help

Includes access to online help for each product, training materials, support website, utilities, and software release information.



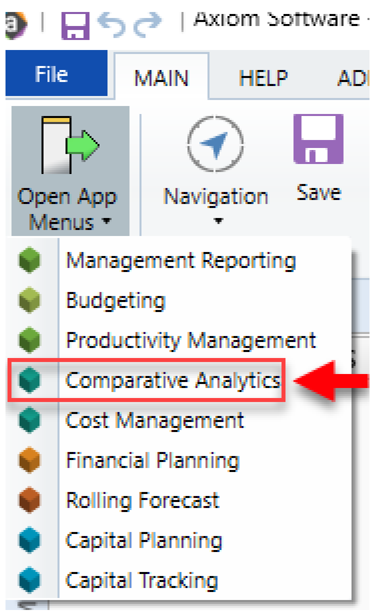
Home

Includes standard spreadsheet commands.



Opening the Axiom Comparative Analytics task panes

For Axiom Comparative Analytics, there is a dedicated User task pane, but the product shares the Management Reporting Admin task panes.

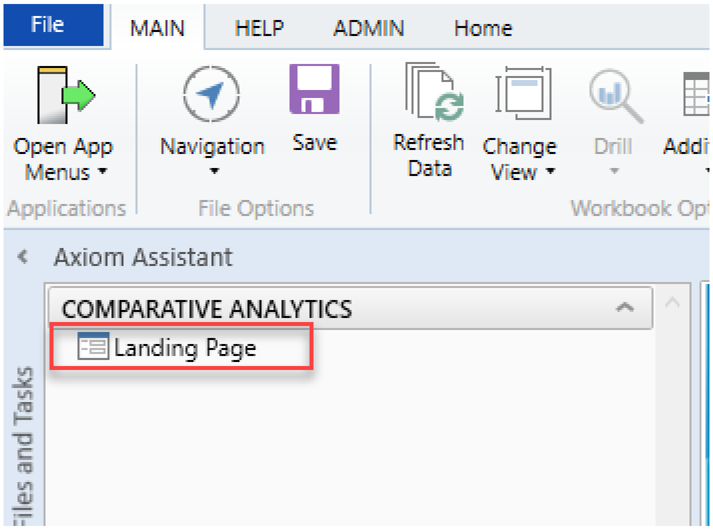


Opening the Comparative Analytics web form

The Comparative Analytics dashboards display in your Internet browser in the Comparative Analytics web form.

To open the Comparative Analytics web form, do the following:

In the Comparative Analytics task panes, double-click **Landing Page**. This will open your browser to the web form home page.



Opening the Explorer task pane

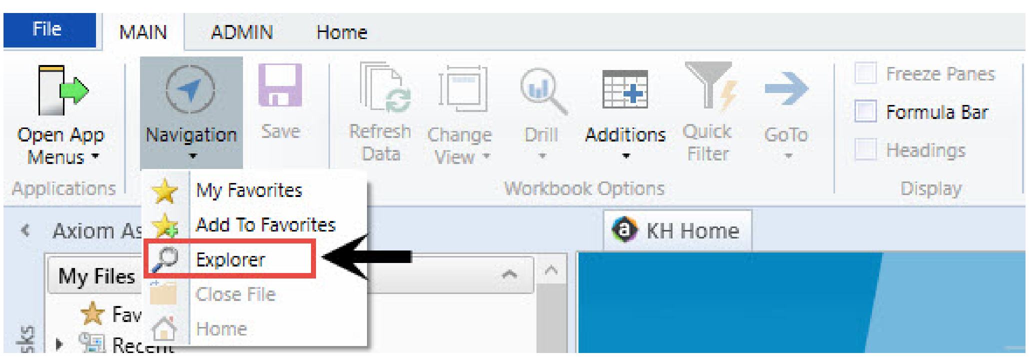
Axiom Comparative Analytics provides a built-in Explorer task pane so that you can quickly access your favorites, recent items, and all the files that you have rights to access.

> **TIP:** You can also access Favorites, Recent, and My Documents from the My Files and Tasks task pane.

By default, all users are given access to this task pane. If desired, administrators can disable use of this task pane entirely, or restrict access to certain sets of users.

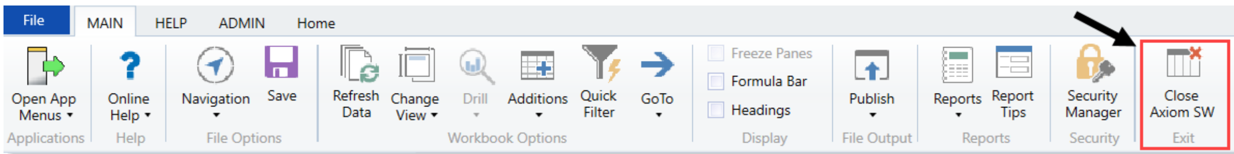
To access the Explorer task pane:

- In the **Main** ribbon tab, click **Navigation**, and select **Explorer**.



Exiting Axiom Comparative Analytics

To exit Axiom Comparative Analytics, in the **Main** ribbon tab, click the **Close Axiom Software** button in the **Exit** group.



You can also simply close the application by clicking the **X** button in the top right corner of the window. Axiom Comparative Analytics prompts you to save any changes to unsaved files.

Working with dimensions

Dimensions are key fields in each data table. Each dimension has its own table that includes a series of attributes (columns) for each element that further defines the dimension. These columns are leveraged throughout various Axiom Healthcare Suite products in reports, planning processes, and plan file configurations. Many dimensions, such as DEPT, are shared between various products.

When Axiom Comparative Analytics 2019.4 is first implemented, your Kaufman Hall Implementation Consultant helps you configure the dimension tables to reflect the structure of your organization (departments, entities, accounts, and so on). Subsequently, you may need to edit dimensions in order to add new departments, accounts, positions, pay types or other items to the database.

> **IMPORTANT:** Because many dimensions are shared across multiple Axiom Healthcare Suite products, do not delete a grouping column or modify entries in the dimension tables without consulting the administrators for the other applications.

Each dimension has multiple fields. The fields within dimensions tables are typically referred to as columns. Field/column names are expressed as *tablename.fieldname*.

Some columns in dimension tables are validated. This means they only allow certain predefined values that are contained in validation system table. If you enter an invalid value, an error occurs when you save, specifying the cell so you can correct it and save again using a corrected entry.

Examples of validated columns include:

- ACCT.Credit – Identifies which accounts should have their signs reversed during an import.
- PAYTYPE.CM_PayCategory – Defines which summary pay category to use for each Cost Management plan file during a sequential interface. May also be used in reporting for grouping PayTypes.
- JOBCODE.CM_PlanCode – Used for combining job codes during reporting and Cost Management plan file creation. If there are historical values for two job codes that you want to report as one combined job code, list the surviving job code on both lines.

Dimensions are managed and maintained using the Dimension Maintenance utility. This utility allows users assigned the Product Administrator role to only manage grouping columns within specified dimensions. It also limits these dimensions to only the elements that the Product Administrator role can access. For more information, see the *Dimension Maintenance Utility Administrator's Guide*, which you can download from https://support.kaufmanhall.com/documentation/documentation.

Working with the Dimension Maintenance utility

Your organization may use multiple distinct Entity Management branches within your structure to help manage your Axiom Software products. It might be the responsibility of each local product administrator to maintain their own elements within dimensions for each Axiom Software product that your organization is licensed for. Additionally, and ideally, each administrator should not be able to modify elements outside of their area, otherwise, reports and processes could be negatively impacted.

The Dimension Maintenance utility allows the administrator for a local branch to manage only grouping columns within a dimension and limits this dimension to only the elements that the administrator has access to.

IMPORTANT: Version 2017.1 and higher includes a variety of security changes to enable this tool. The dimension tables have been restricted to read-only access until the system administrator configures a user for dimension maintenance security. For more information, see the Editing the security rights for a user chapter of your Performance Reporting Admin Guide.

IMPORTANT: This section assumes that you have configured the Dimension Maintenance utility and set the security rights for the appropriate users so that they can access the utility from the Administrator task pane to manage and configure dimensions. For more information on Dimensions and configuring the Dimension Maintenance utility, see the Working with Dimensions chapter of your Performance Reporting Admin Guide.

The Dimension Maintenance utility allows administrators to:

- Have multi-user and filtered access to key universal dimensions.
- Restrict dimension grouping column maintenance to specified product grouping columns.
- Create dimension grouping columns, and assign them to products.
- Add new records and update all validated grouping columns, even when they are outside of that product range.
- Create dimension grouping columns that automatically display in an organized manner.

To enable the Dimension Maintenance functionality described above, the following features were created:

- In the Edit Data Structure mode, administrators can manage grouping columns using datasets.
- In the Dimension Maintenance utility, depending on their roles, users can select the products and dimensions to maintain.
- Using the security feature in the Dimension Maintenance utility, for each product, administrators can quickly assign write filters to those users who have an administrator role assigned to them.

The following table represents which dimensions are part of each product. A check mark means users can access the dimension using the Dimension Maintenance utility, but the records each user can edit depends on the security filter applied to each.

	Management Reporting Admin	Budgeting Admin	Rolling Forecast Admin	Capital Planning Admin	Capital Tracking Admin	Cost Management Admin	Costing Admin	DSS Admin	Financial Plan Admin
ACCT	✓	✓	✓			✓	✓		✓
CDMCode	✓	✓					✓	✓	
COSTCAT							✓	✓	
COSTITEM							✓	✓	
COSTMETHOD							✓		
COSTPOOL							✓	✓	
CPT	✓	✓					✓	✓	
DATATYPE	✓	✓							
DEPT	✓	✓	✓	✓	✓	✓	✓	✓	✓
ENTITY	✓	✓	✓	✓	✓	✓	✓	✓	✓
FINCLASS	✓	✓						✓	
ICATEGORY						✓			
INSPLAN							✓	✓	
IRESULTS						✓			
ITYPE						✓			
JOBCODE	✓	✓				✓	✓		✓
LOCATION	✓	✓					✓	✓	
METRICID						✓			
PAYTYPE	✓	✓				✓	✓		
PROVIDER	✓	✓					✓	✓	
REVCODE							✓	✓	
RFCODE			✓						✓
RFGROUP			✓						✓
YRMO							✓	✓	

Adding a dimension record

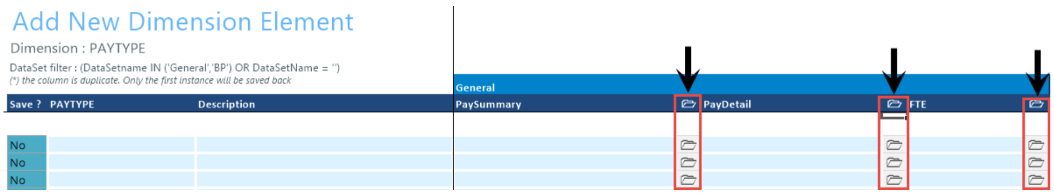
When you save the new dimension record, it displays in the existing table on the next utility refresh.

To add a dimension record:

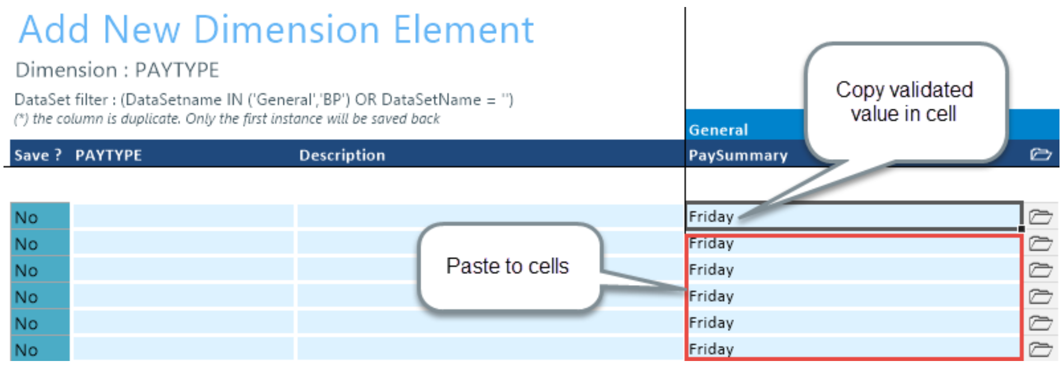
1. To select the product to add the new dimension record, do the following:
   a. Press **F9** or in the **Main** ribbon tab, in the **Workbook Option** group, click **Refresh Data**.
   b. In the **Refresh Variables** dialog, from the **Select The Product To Edit** drop-down, select the Axiom Healthcare Product.
   c. From the **Select a Dimension to Edit** drop-down, select the dimension.
   d. Click **OK**.
2. At the bottom of the workbook, click the **Add_New_Dimension** tab.

3. You can type a value in the cell free-form or select from a list of existing validated values. These are represented with a folder icon next to the grouping column. You can do one of the following to enter validated values:

   - Next to the column, double-click the folder icon. In the **Choose Value** dialog, select the value, and click **OK**.

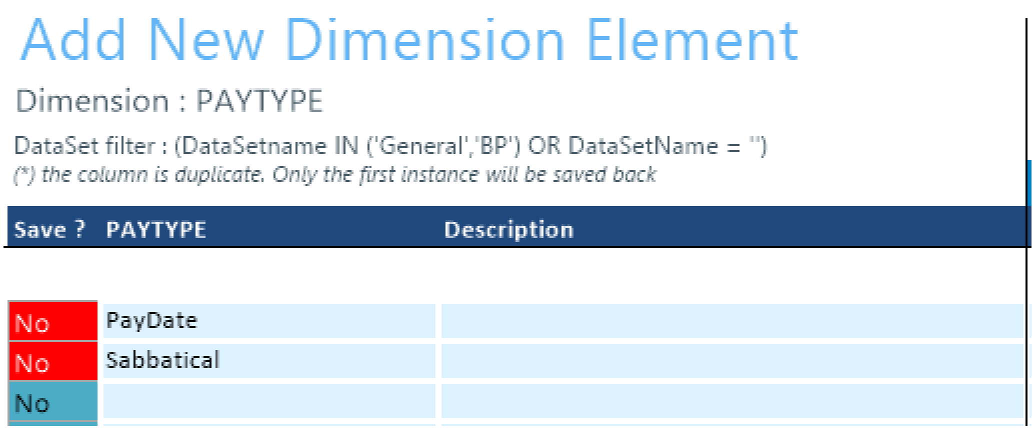


   - If you have a large number of entries to make, instead of opening each folder, you can copy and paste the validated value to other cells in the same column.



4. For each record to create, in the **Save?** cell, click the drop-down box, and select **Yes**.

   If you do not select Yes, the **Save ?** cell for the new dimension displays No with a red background as a reminder that you need to save your changes. If you do not save your changes, the default values you enter will not display. If you leave the values unpopulated, the system will populate the defaults using those defined in the column properties in the dimension table.



5. In the **Main** ribbon tab, click **Save**.

Upon Save, the new record posts to the database and the utility refreshes, moving the newly saved record to the **Dimension Maintenance** tab.

IMPORTANT: When adding new records, the field used as that user's security filter must be completed and within their filter before it will save successfully. If it is not, the system displays a message that you cannot post this record to the database because it is outside of your write filter. For example, if a security administrator using the Dimension Maintenance Security provides a filter for Angela to grant her edit rights to the Department dimension for Entity =2, then Angela must enter 2 in the Entity column before saving. For more information about setting up security for the Dimension Maintenance utility, see the Editing the security rights for a user section of your Performance Reporting Admin Guide.

Editing a dimension

The Dimension Maintenance utility allows you to edit the grouping columns for one or more products, but the product options available to you depend on the role assigned to you. Axiom Financial Planning administrators have rights to Financial Planning dimensions, Axiom Capital Planning and Capital Tracking administrators have rights to Capital dimensions, and so on.

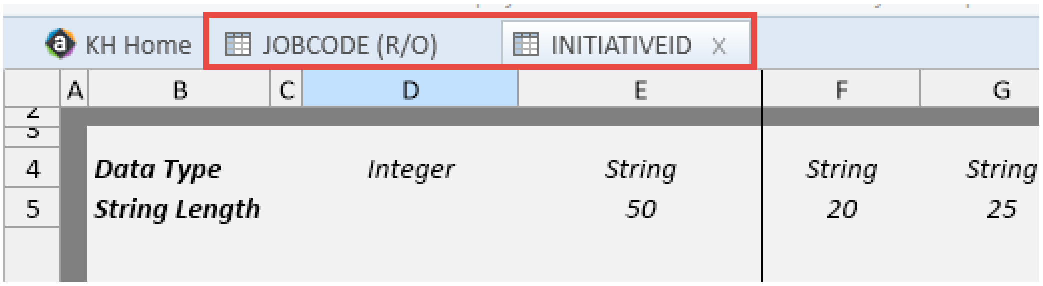
TIP: You never edit database tables directly in the database. Instead, data is pulled into spreadsheets, where you can edit the data and then subsequently save it back to the database.

The columns that display depend on what products each column is assigned to using the Data Set Assignment.

When editing dimensions, keep in mind the following:

- The products you select determine the columns you can view.
- The dimension you select determines the table you can edit.
- Your role determines the records you can edit.

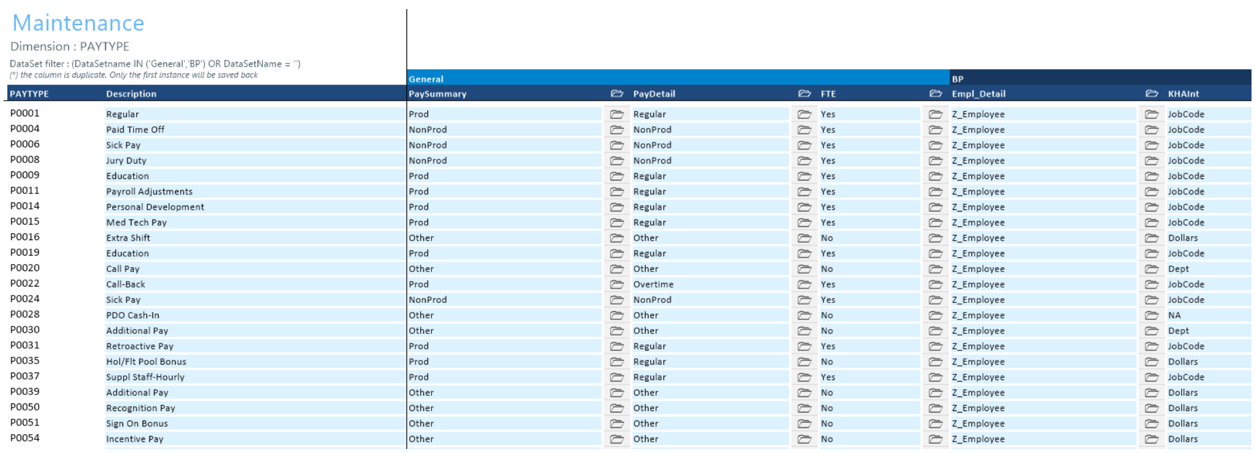
Some dimensions are not included in the Dimension Maintenance utility. You can continue to access and modify these dimensions from the Axiom product's Admin task pane, as usual. If the dimension you open displays as read-only, this means that you need to use the Dimension Maintenance utility to modify it. For example, in Axiom Budgeting, when you open the DEPT dimension from **Bud Admin task pane > Budget System Maintenance > View Dimension Tables**, the tab displays DEPT R/O. Though you can view the dimension, you need to use the Dimension Maintenance utility to edit it. On the other hand, if you open the INITIATIVEID dimension, the tab does not display R/O. This means that you can modify the dimension as usual. This is because the INITIATIVEID table is not included in the list of tables that are maintained via the Dimension Maintenance utility.



IMPORTANT: Edit dimension data with extreme care, as any errors introduced could cause problems throughout the system. Do not modify fields not described in Axiom documentation.

After you select the product(s) and dimension to edit, the Dimension Maintenance utility refreshes itself and displays the different products and the columns that belong to them for the dimension. As seen in the following example, the columns display in groups.

TIP: It is not always necessary to populate every field. Enter as much information in the dimension table as you have available.



Maintenance

Dimension : PAYTYPE

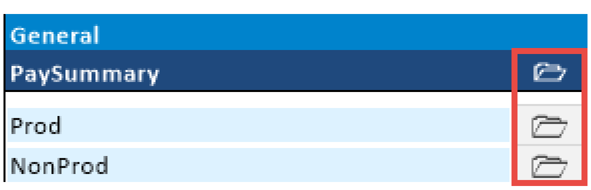
DataSet filter : (DataSetname IN ('General','BP') OR DataSetName = '')

(*) the column is duplicate. Only the first instance will be saved back

		General			BP	
PAYTYPE	Description	PaySummary	PayDetail	FTE	Empl_Detail	KHAInt
P0001	Regular	Prod	Regular	Yes	Z_Employee	JobCode
P0004	Paid Time Off	NonProd	NonProd	Yes	Z_Employee	JobCode
P0006	Sick Pay	NonProd	NonProd	Yes	Z_Employee	JobCode
P0008	Jury Duty	NonProd	NonProd	Yes	Z_Employee	JobCode
P0009	Education	Prod	Regular	Yes	Z_Employee	JobCode
P0011	Payroll Adjustments	Prod	Regular	Yes	Z_Employee	JobCode
P0014	Personal Development	Prod	Regular	Yes	Z_Employee	JobCode
P0015	Med Tech Pay	Prod	Regular	Yes	Z_Employee	JobCode
P0016	Extra Shift	Other	Other	No	Z_Employee	Dollars
P0019	Education	Prod	Regular	Yes	Z_Employee	JobCode
P0020	Call Pay	Other	Other	No	Z_Employee	Dept
P0022	Call-Back	Prod	Overtime	Yes	Z_Employee	JobCode
P0024	Sick Pay	NonProd	NonProd	Yes	Z_Employee	JobCode
P0028	PDO Cash-In	Other	Other	No	Z_Employee	NA
P0030	Additional Pay	Other	Other	No	Z_Employee	Dept
P0031	Retroactive Pay	Prod	Regular	Yes	Z_Employee	JobCode
P0035	Hol/Flt Pool Bonus	Prod	Regular	No	Z_Employee	Dollars
P0037	Suppl Staff-Hourly	Prod	Regular	Yes	Z_Employee	JobCode
P0039	Additional Pay	Other	Other	No	Z_Employee	Dollars
P0050	Recognition Pay	Other	Other	No	Z_Employee	Dollars
P0051	Sign On Bonus	Other	Other	No	Z_Employee	Dollars
P0054	Incentive Pay	Other	Other	No	Z_Employee	Dollars

In the blue cells, you can do the following:

- Choose from a list of validated values by double-clicking the folder in the column next to the grouping column.



- Enter free-form values, though we recommend that you take into consideration any existing values or rules for that column.

Grouping columns tagged as General display first, as shown in the previous example. General columns are typical reference fields leveraged by multiple products. Each subsequent grouping displays based on the products you selected. Records display depending on the security assigned to you. For example, if a no write filter is assigned for that member, the dimension will return no records.

> **IMPORTANT:** If you are not sure whether to edit a cell, contact your system administrator.

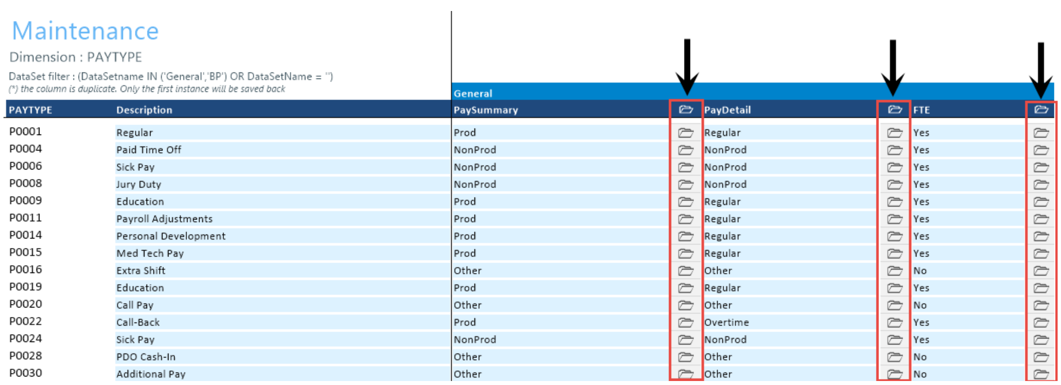
Some columns in dimensions tables are validated, allowing only certain predefined values. If you enter an invalid value, an error will occur when you save, specifying the cell so you may make a correction and save again.

To edit a dimension:

1. In the **Main** ribbon tab, click **Refresh Data**.
2. In the **Refresh Variables** dialog, do the following:
    a. In the **Select The Product To Edit** drop-down, select the product.

    > **NOTE:** The list of products that display is determined by the Axiom product licenses that your organization owns.

    b. In the **Select a Dimension to Edit** drop-down, select the dimension, and click **OK**.
3. To retrieve a smaller subset of data, you can use the **Quick Filter** in the **Workbook Options** of the **Main** ribbon tab.
4. Enter the dimension member attribute information in the appropriate cells. You can type a value in the cell free-form or select from a list of existing validated values. These are represented with a folder icon next to the grouping column. You can do one of the following to enter validated values:
    - Next to the column, double-click the folder icon. In the **Choose Value** dialog, select the value, and click **OK**.



Maintenance

Dimension : PAYTYPE

DataSet filter : (DataSetname IN ('General','BP') OR DataSetName = '')

(*) the column is duplicate. Only the first instance will be saved back

		General		
PAYTYPE	Description	PaySummary	PayDetail	FTE
P0001	Regular	Prod	Regular	Yes
P0004	Paid Time Off	NonProd	NonProd	Yes
P0006	Sick Pay	NonProd	NonProd	Yes
P0008	Jury Duty	NonProd	NonProd	Yes
P0009	Education	Prod	Regular	Yes
P0011	Payroll Adjustments	Prod	Regular	Yes
P0014	Personal Development	Prod	Regular	Yes
P0015	Med Tech Pay	Prod	Regular	Yes
P0016	Extra Shift	Other	Other	No
P0019	Education	Prod	Regular	Yes
P0020	Call Pay	Other	Other	No
P0022	Call-Back	Prod	Overtime	Yes
P0024	Sick Pay	NonProd	NonProd	Yes
P0028	PDO Cash-In	Other	Other	No
P0030	Additional Pay	Other	Other	No

    - If you have a large number of entries to make, instead of opening each folder, you can copy and paste the validated value to other cells in the same column.

IMPORTANT: Do not change the format of cells in dimensions (e.g., number, date, percentage, and so on).

5. After you finish making your changes, in the **Main** ribbon tab, click **Save**.

NOTE: If a column is missing, then it is assigned to a different dimension or not assigned. For more information, see your Performance Reporting Admin Guide.

Dimensions used by Comparative Analytics

Axiom Comparative Analytics uses the following dimensions defined in this section:

- ENTITY - Provides basic information about the entities supported by the software and can determine for some products, e.g. Cost Accounting, which entities to include in processing of data.
- ACCT - Contains records for each account in the GL of your organization. This includes accounts that can be found on the balance sheet, income statement, hours, and statistics.
- DEPT - Contains records for each department within an organization. For example, radiology, emergency, finance, and so on.
- JOBCODE - Includes records for all of the JobCodes within your organization. Each JobCode represents a job position or role within the organization.
- PAYTYPE - Includes records for all of the possible categories of compensation that an employee might receive.

ENTITY

The ENTITY dimension table provides basic information about the entities supported by the software and can determine for some products, e.g. Cost Accounting, which entities to include in processing of data.

The following table lists all of the options available in this dimension table:

Column	Description
ENTITY	The primary key for the table using an integer data format.
Description	The long entry description.
Abbrev	The standard abbreviation for the entity.
Beds	The bed size of the entity.
PayCycle	The entity's primary pay cycle.
VarAmount	The reporting variance amount in dollars.
VarPercent	The reporting variance amount in percent.
Costing	Do one of the following: • If the entity is used in Axiom Cost Accounting, select **True**. • If the entity is not used in Axiom Cost Accounting, select **False**.
KHAStandardClass	Used for reporting.
MPN	Used to store the Medicare Provider Number.
State	Used to identify the state.
Active	Used to identify whether the entity is active (True) or inactive (False).

ACCT

The ACCT dimension table contains records for each account in the GL of your organization. This includes accounts that can be found on the balance sheet, income statement, hours, and statistics.

Refer to the Axiom EPM Dimensions Setup files (AcctCoding sheet) for codes to use in \Axiom\Reports Library\System Files\Documents\Admin\Management Reporting\KHA EPM Dimensions Coding.xls.

NOTE: Some dimension tables are shared across multiple Axiom products. As a result, some of the columns listed in the following table may not display in the Dimension Maintenance Utility, depending on the Axiom products in which your organization is licensed.

The following table lists all of the options available in this dimension table:

Column	Description
ACCT	The Axiom Software account number. This can be the combination of the prime account and sub account, if that is how your GL system is set up.

Column	Description
Description	The account description from the GL. Do not enter a description in all capital letters. To remove the all-caps format in the spreadsheet, use the Proper formula =Proper().
Credit	Used during the interface process to reverse the signs so values are stored in a positive condition in the database. Select one of the following valid entries: • **dr** • **C** Normally, Revenue and Liabilities are C, and all others are dr.
RptMap	Used to group accounts. Valid entries include any account numbers in the ACCT column. The system automatically copies the information in the ACCT column to this column during installation.
Statement	Used to identify the Financial Statement category. Select one of the following valid entries: • **BS (Balance Sheet)** • **HoursJC (Jobcode Hours)** • **Hours** • **IS (Income Statement)** • **KeyStat** • **NI (New Initiatives)** • **SCA (Cost Management)** • **Statistic** • **VCC (Variance Comments Collection)** **NOTE:** This is an Axiom standard column and categories cannot be added or edited. The default value is NA.

Column	Description
Type	Used to identify the major Financial Statement category. Select one of the following valid entries: • **Asset** • **Bmark (Benchmark)** • **Capital** • Comments • Deduction • Equity • Expense • GenStat • HoursJC (Job Code Hours) • Hours • KeyStat • Liability • NetAsset • Plan • Revenue • Scenario • Statistic • Target (Hours codes that are not reported as FTEs should be coded as Statistic.) **NOTE:** This is an Axiom standard column and categories cannot be added or edited. The default value is NA.
FSSummary	Used to identify summary-level Financial Statement categories. For the naming convention, use the first letter of the type category with an underscore and then the category name. For example, R_PatientRev or E_Salaries. **NOTE:** This is an Axiom standard column and categories cannot be added or edited. Default value is NA.
FSDetail	Used to identify line-item Financial Statement categories. For the naming convention, use the first letter of the type category with an underscore and then the category name. For example, R_IPRev, R_OPRev. For a list of the available options, see Options for Acct.FSDetail. **NOTE:** This is an Axiom standard column and categories cannot be added or edited. The default value is NA.

Column	Description
FSPayor	A variation of FSDetail used if GL accounts have payor categories; used for Budgeting Deductions models. If this is not used, match to FSDetail. Categories can be added or edited. The default value is a blank.
FPCode	Used to identify the name of the Financial Planning category to use for summarization during the integration process with Axiom Financial Planning. If Axiom Financial Planning is not used, the default is NA.
FSProvider	Used to identify line-item Financial Statement categories. For the naming convention, use the first letter of the type category with an underscore and then the category name. For example, R_IPRev, R_OPRev. **NOTE:** This is only used if licensed for the Provider Budget Module. The default value is NA.
FPCategory	Used to identify the name of the Financial Planning category to use for transferring the financial plan targets during the integration process with Axiom Financial Planning. If Axiom Financial Planning is not used, the default is NA.
BPCode	Used to identify the payors from the Budget Deductions report. During installation, the system automatically copies the information from the FPCode column to this column.
FlexStat	Identifies the primary statistic used for Flexible Budgeting. The most common set up is KeyTot for all stat, hours, and expenses. Revenue uses KeyIP for IP, KeyOP for OP, and KeyOth for other patient revenue. The default is NA.
FlexPercent	Identifies default variable percentage (0-100%) to use for Flexible Budgeting. Values should be entered as decimals, 0.75 = 75%. The default value is 0 (zero).
ReclassType	A grouping attribute that is useful in defining the type of reclass to use in the in Axiom Cost Accounting reclass functionality.
AllocType	Defines the type of account for indirect allocations in Axiom Cost Accounting.
FlexGroup	Used to group accounts together for Flexible Budgeting. For example, Medical Supplies or Other Expenses. The default is NA.
CostVarPct	The Percent Variable for Axiom Cost Accounting; 0 = Fixed, which is used in the costing processes to determine the dollar weighted variability for calculation results.

Column	Description
KHAInt	Used to identify which tab an account should be interfaced to during the budget plan file create process. Valid entries include the following: • To assign to all statistics, revenue, and deduction accounts that will be budgeted in the budget plan files, type Stat_Rev . • To assign to all expense and hours accounts that will be budgeted in the budget plan files, type Expense. • To exclude an account from all budget plan files, type NA.
KHAStdLine	Used to identify default budget methodology used in budget plan files during budget plan file creation. Refer to calc methods for Stat_Rev sheet and Expense sheet in the *Axiom Budgeting and Performance Reporting Administrator's Guide* (Budget Plan Files chapter) for valid entries and definitions. The default value is NA.
Cost_Provider	Used by the Axiom Cost Accounting system when performing the Provider RVU costing method. This identifies the cost information at the account level that is associated to the Provider, which is then allocated to his or her patients' cost item or chargeable activities.
KHABgtCode	Used for combining accounts together during budget plan file creation. If there are historical values for two accounts that you want to budget as one combined account, list the surviving account number on both lines. If not combining accounts, this value should match value in the Account column. The default value is 0 (zero).

Column	Description
BudgetType	Used to identify which category an account should be interfaced to during the budget plan file interface process. If KHAInt = Stat_Rev, valid entries are: • IPRev • OPRev • OthPtRev • OtherRev • Allowance • BadDebt • KeyIP • KeyOP • KeyOth • OthStat If KHAInt = Expense, valid entries are: • Salaries • Benefits • Supplies • OtherExp • PaidHours The default value is NA.
DropDown	Identifies Drop Down pick list when adding new accounts on Stat_Rev or Expense sheets in the budget plan file. It should be the same as value in BudgetType column.
CDMStdLine	Used to identify default budget methodology for CDM budget plan files (departments which have CDMStdLine in KHACMDimGrp column of DEPT Dimension) during budget plan file creation. It is used similarly to KHAStdLine in Budget Planning workbooks. Valid entries are: • Statistical accounts = CDMStatistic • IP Revenue accounts = CDMIPRevenue • OP Revenue accounts = CDMOPRevenue Copy the remaining account assignments from KHAStdLine column.

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>KHASum</td><td>Used to summarize information from the Stat_Rev and Expense sheets to the Summary sheet within the budget plan files.

NOTE: This is an Axiom standard column and categories cannot be added or edited. The default value is NA.</td></tr>
<tr><td>CYPMethod</td><td>Used to identify the methodology used for projecting the remainder of the current fiscal year. Valid entries are dependent upon values in KHAStdLine column:

Input Monthly, Detail, or any of the Fixed Options:

Rolling12 – Use historical values from previous year's same months
Annual –- Annualize YTD value
RemBud – Use remaining budget
CapBud – Use Total Budget less YTD actual
PctBud – Use percentage of CY Actual over Budget

Variable – Use Variable
Labor – Use Labor
FICA – Use FICA
Hours – Use Hours
GlobalExpense – Use GlobalExpense
Depreciation – Use Depreciation
IP_Per_Unit – Use IP_Per_Unit
OP_Per_Unit – Use OP_Per-Unit
Oth_Per_Unit – Use Oth_Per_Unit
</td></tr>
<tr><td>PhyStdLine</td><td>Used to identify default budget methodology used in the Provider budget plan files (departments which have PhyStdLine in KHACMDimGrp column of the DEPT dimension table) during budget plan file creation. Refer to Provider Version Only: Calc Methods - Stat_Rev Sheet and Expense Sheet in the Axiom Budgeting and Performance Reporting Administrator's Guide (Budget Plan Files chapter) for valid entries and definitions. The default value is NA.</td></tr>
</table>

Column	Description
CYFMethod	Used to identify the methodology used for projecting the remainder of the current fiscal year in the current year forecast utility. This utility is available in Axiom Budgeting and Performance Reporting in the Bud Admin task pane in Financial Reporting > Financial Utilities > Current Year Forecast. Statistics: • Key Dept Statistics – See Forecast Methods below, normally use Trend • Other Dept Statistics – See Forecast Methods below Revenue: • IP Revenue – IP_Per_Unit • OP Revenue – OP_Per_Unit • Other Patient Revenue – Oth_Per_Unit • Other Operating Revenue – See Forecast Methods below Salaries: • Hours – See Forecast Methods below • Salaries – Labor All Other Accounts: See Forecast Methods below Forecast Methods: • IP_Per_Unit: YTD IP_Per_Unit * Forecasted Volume • OP_Per_Unit: YTD OP_Per_Unit * Forecasted Volume • Oth_Per_unit: YTD Oth_Per_Unit * Forecasted Volume • Labor: Actual Hourly Rate * Forecast Hours * Budget Rate Change • RemBud: Remaining Budget from CYB • Annual: YTD / Calendar Days * Remainng Calendar Days • Rolling12: YTD Actual / YTD Budget * Remainder of LYA • PctBud: YTD Actual / YTD Budget * Remainder of CYB • Variable: Actual Rate per Unit * Forecast Volume • Trend • CapBud: Remaining Budget not to exceed the annual budget You can also add additional CYFMethod columns. Create a new CYFMethod column and use this in conjunction with the CYFDimGrp column in the DEPT dimension if you need to use a different CYP method for different departments.

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>BudStat</td><td>Identifies Budget Statistic accounts used in Budget Statistics Driver. Standard entries are:
Admits
PatientDays
Discharges
AdjDischarges
Encounters
ERVisits
ClinicVisits
You can also create custom stats to use in the Budget Statistics Driver and identify accounts appropriately. The default value is a blank.</td></tr>
<tr><td>CMStdLine</td><td>Used to identify the StdLine for Axiom Cost Management.</td></tr>
<tr><td>KHAStandardClass</td><td>KHA standard classification used for reporting.</td></tr>
<tr><td>BPCategory</td><td>Used to identify the Budget Planning category.</td></tr>
<tr><td>NewDeptStdLine</td><td>Used to set or update the calc method for each department.</td></tr>
<tr><td>InitStdLine</td><td>Use to make accounts available for initiatives in the Axiom Budgeting budget workbook.

In the Choose Value dialog for the InitStdLine, there are five validated values to select from. The following table lists the Initiative Standard Lines that we recommend you assign to each account type:
Statistics accounts to use Detail Line
Patient Revenue accounts to use Patient Revenue
Other Revenue accounts to use Detail Line
Deduction accounts to use Detail Line
Labor accounts to use Detail Line
Benefit accounts to use Detail Benefits w Percent
All other expense accounts to use Detail Line
Hours accounts to use Hours Line
For accounts not configured, NA will be the default value</td></tr>
<tr><td>RFCode</td><td>Identifies the RFCode for account. Only used with Axiom Rolling Forecast. The default value is Z_Exclude.</td></tr>
<tr><td>CM_Group</td><td>Used to summarize account types at a higher level for Axiom Cost Management analysis and reporting needs.</td></tr>
</table>

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>InitType</td><td>Used by the system to select the sections so that when the user refreshes the plan file, the accounts will insert into the appropriate section of the Initiative block in the Axiom Budgeting budget workbook.

In the Choose Value dialog for the InitType, you can configure up to seventeen possible values. The section types available are noted in the following list. NA is the default value until configured or for any account not configured.
Benefits
ContractLabor
Deduction
Depreciation
Drugs
Hours
Interest
IPRev
NA
OPRev
OtherExp
OtherRev
ProFees
PurchSvcs
Salaries
Statistic
Supplies</td></tr>
<tr><td>CM_NonLabor</td><td>Used to classify non-labor accounts in Axiom Cost Management according to FSDetail. Valid entries include the following:
Drugs
KeyStats
OtherExp
PurchSvcs
Supplies
These classifications are used in reporting and plan creation.</td></tr>
<tr><td>CM_Map</td><td>Used to map accounts together in Axiom Cost Management. You can use this column to map closed accounts with another existing account or to group like accounts.</td></tr>
</table>

Column	Description
CM_TargetBgt	Used to create team workbooks in Axiom Cost Management at the account level.
CM_FlexStat	Used to identify the flex stat for Axiom Cost Management.
CMFlexPercent	Used to identify the flex percentage for Axiom Cost Management.

DEPT

The DEPT dimension contains records for each department within an organization. For example, radiology, emergency, finance, and so on.

The following table lists all of the options available in this dimension table:

Column	Description
DEPT	The Axiom Software department number, which is formed by combining the entity and cost center.
Description	The department description. The naming convention is entity abbreviation with department description. For example, MHS Operating Room. **NOTE:** For closed departments, add three asterisks to the beginning of the description. For example, MHS *** Operating Room. Descriptions should not be in all capital letters.
Entity	The Axiom Software entity code. The description lookup table is in the ENTITY dimension table. This should be the Business Unit, and match the first three to four characters of the department number.
CostCenter	The cost center portion of the department number. You can use this for comparative reporting across entities, such as comparing the cost per unit of all operating rooms across your health system.
RptMap	Used to consolidate departments for reporting.
BudgetGroup	A collection of departments used primarily for plan file purposes. This is commonly setup by a KHA consultant during implementation but can easily be updated by clients. For example, departments 16010 and 16020 may be assigned to EMC budget group. **NOTE:** BudgetGroup is a validated dimension so additions and deletions need to first be added/deleted in the associated validation table.
ProdMap	Used to consolidate departments for productivity reporting.
VP	The Vice President responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.

Column	Description
Director	The director responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.
Manager	The manager responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.
Division	The division for rollup reporting, which is defined by your organization. You can use this information to consolidate types of departments together for reporting. For example, you can use the word Radiology to combine all radiology departments across all entities.
KHABgtTemplate	Used to identify the template to use for plan file creation. Valid options include the following: • **Master** • **NoBudget** • **RollingForecast** **NOTE:** This is an Axiom standard column and categories cannot be added or edited. The default value is **NA**.
KHABgtCode	Used to identify departments to combine during plan-file creation.
TplOptions	Used to identify the template option based on licensed products. Valid options include the following: • **Master** (common for all clients) • **MasterCDM** (used for clients licensed for CDM option) • **MasterProvider** • **NoBudget** • **RFProvider**
CM_Template	Used to assign a specific Axiom Cost Management plan template.
LaborType	Used to identify the labor method to use for plan file creation. Valid options are: • **altEmployee** • **Employee** • **HHLabor** • **JobCode** • **JobCodeADC** • **NoBudget** • **Staffing** **NOTE:** This is an Axiom standard column and categories cannot be added or edited. The default value is NA.

Column	Description
CM_Map	Similar to RptMap, used to consolidate departments for reporting.
KHACMDimGrp	Used to identify the Standard Line selected from the ACCT dimension for use in budget planning specifically for the budget values. Valid options are the options used on the ACCT dimension. For example the common ones uses include: KHAStdLine, PHYStdLine.
CM_TeamMap	Used to create team-planning workbooks. You can create teams by combining like departments or like accounts for team Axiom Cost Management planning.
JobcodeDimGrp	Used to designate which labor type distribution set applies to the associated department. KHAInt is the standard set of job code labor types. PhyInt is the modified set of job code labor types.
ProjDimGrp	Used to identify the Standard Line selected from the ACCT dimension for use in budget planning specifically for the projection values. Valid options are the options used on the ACCT dimension. For example the common ones uses include CYPMethod.
CM_Team	Create teams by combining like departments for team Axiom Cost Management planning.
KHABgtMap	Used for combining departments during plan-file creation. This column is also used when more than one department is needed in one plan file.
CM_Division	Used to group similar departments for Axiom Cost Management reporting and analytics.
CYFDimGrp	Used to identify which CYFMethod column each department uses to forecast accounts. Valid options are: • CYFMethod - Uses the method specified in ACCT.CYFMethod • NA - Not Applicable • [Other Column Name] - Uses the method specified in the corresponding column on the ACCT dimension table
FPNode	Used to group the department to the appropriate FPNode in Axiom Financial Planning.
ShowOnList_Costing	Determines which departments to include in the unit cost processing.
CM_BMarkStatus	Used to define which departments to include in Axiom Cost Management benchmarking reports and analytics. Valid entries include the following: • To include the department, type **Yes**. • To exclude the department, type **No**.

Column	Description
FPType	Used to group the department to the appropriate FPTYPE in Axiom Financial Planning.
Owner	Used to identify the network ID of the person responsible for initial input of the plan file (i.e. Manager). It should be the same as their Axiom login ID. Naming convention would be first initial, full last name (or whatever your network ID naming convention is).
DeptType	Determines the Direct or Indirect department category. Direct departments are those that generally provide patient care services and generate revenue, while Indirect departments are involved in support services and do not generate patient care related revenue.
FPNodeBS	Balance Sheet node for Axiom Financial Planning.
Reviewer	The network ID of the person responsible for reviewing the cost management plan, for example, Director. This information should be the same as the user's Axiom Software login ID. The naming convention is first initial, full last name or whatever your network ID naming convention is.
Approver	The network ID of the person responsible for approving the cost management plan, for example, VP. This information should be the same as their Axiom Software login ID. The naming convention is first initial, full last name or whatever your network ID naming convention is.
CM_DeptStandard	Used for mapping departments to external benchmark data. This mapping matches the department to the ExternalBMark information in the Axiom Cost Management file groups.
CM_PdHrsMetricID	The paid hours metric ID from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_ Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CM_WkdHrsMetricID	The metric ID for worked hours from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CM_ NonLabor1MetricID	The metric ID for NonLabor 1 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_ Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CM_ NonLabor2MetricID	The metric ID for NonLabor 2 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_ Benchmarks_yyyy tables. Used only in Axiom Cost Management.
BudLocalAdmin1	Used to select the local administrator for Axiom Budgeting.

Column	Description
CM_CombineStat	Used to determine if key statistics should be combined when grouping departments together with CM_Map grouping column for Axiom Cost Management. Valid entries include the following: • If the key statistics of the rolled up departments are to be cumulative, type **Y**. • To only use the key statistics from the surviving department, type **N**.
CM_ NonLabor3MetricID	The metric ID for NonLabor 3 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_ Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CM_ NonLabor4MetricID	The metric ID for NonLabor 4 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_ Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CostMap	Allows departments to processed as a group in the unit cost processing phase of cost accounting. All costs for the group are combined and allocated to all of the Cost Items within the group. In most cases, the first or largest department of the groups becomes the target CostMap definition to which the other members are mapped.
ShowOnList_Budgeting	Used to identify if a department displays to be selected during the plan file creation process. Valid entries include the following: • **True** • **False**
CM_ NonLabor5MetricID	The metric ID for NonLabor 5 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_ Benchmarks_yyyy tables. Used only in Axiom Cost Management.
BudLocalAdmin2	Used to select the local administrator for Axiom Budgeting.
MarkupName	The specified markup table to use when processing unit costs using the Reverse Markup method. **NOTE:** Currently only one table is available per department.
BudLocalAdmin3	Used to select the local administrator for Axiom Budgeting.
FinContact	Used to assign the finance contact for a department during the cost management process.
KeyStatDesc	Used to identify the description of the primary statistic for each department.
FlexGroup	Used for grouping departments together for the flexible budget utility. (For example, Imaging).

Column	Description
FlexDept	Used for defining each department as fixed or variable during the flexible budget utility. Valid entries include the following: • **Yes** • **No** • **NA**
Campus	Used as part of Axiom Cost Accounting.
KHAStandardClass	Used for reporting.
RFGroup	Used to define your forecast groups. Consider: • Management structure and cultural impact. • Team concept versus individual department managers. • The availability of a statistic that can be collected.
CM_ShowOnList	Used to define which departments to build Axiom Cost Management plan files. Valid entries include the following: • To build a plan file, type **TRUE**. • To exclude from plan file lists and build, type **FALSE**.
CM_PlanGroup	Used to group departments together for applying assumptions and configurations in Axiom Cost Management driver files.
CM_ ExtBenchmarkSource	The source name of the external benchmark to use for this department in Axiom Cost Management. Used to link a department with the CM_Benchmarks_yyyy tables.
ShowOnList_Capital	Used to define which departments to build Axiom Capital Planning plan files. Valid entries include the following: • **True** • **False**
PM_IT	The IT reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_Facilities	The Facilities reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_Clinical	The Clinical Engineering reviewer assigned for Process Management in the Axiom Capital Planning and Capital Tracking systems.
PM_Voting	The owner of the prioritization process assigned for Process Management in Axiom Capital Planning and Capital Tracking.

Column	Description
ProviderType	Select, by dept, whether to use the Detail or Summary options for provider plan files.
PM_Legal	The Legal reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_HR	The Human Resources reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_Purchasing	The Purchasing or Supply Chain reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_CFO	The Chief Financial Officer reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_CEO	The Chief Executive Officer reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_BOD	The Board of Directors reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_Accounting	The Accounting reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
CM_DeptSeries	Groups departments into service lines or other client-defined series for Axiom Cost Management analytics and reporting.

JOBCODE

The JOBCODE dimension table includes records for all of the JobCodes within your organization. Each JobCode represents a job position or role within the organization.

The following table lists all of the dimension options available in the JOBCODE dimension table:

Column	Description
JOBCODE	The Axiom Software job code. This entry must be an alpha-numeric field so that during the import process a J is prepended to all job codes to ensure they are alpha numeric.
Description	The job code description from the payroll system. Do not type descriptions using all capital letters. To remove the all-caps format in the spreadsheet, use the Proper formula =Proper().
GLAcct	The GL account where regular dollars are posted on the GL. If your payroll data maps to the GL based upon pay type, type **0**(zero).

Column	Description
HRAcct	The GL account where regular hours are posted on the GL. If your payroll hours map to the GL based upon pay type, type **0**(zero).
FICAAcct	The FICA account code to use for each job code. You can use this to allocate FICA expense to different accounts by job code.
JobClass	The major job classes of individual job codes. You can use this to apply salary increases for specific groups. Commonly used entries include the following: • **Management** • **Physician** • **Professional** • **Technical** • **RN** • **LPN** • **Assistant** • **Support** • **Other** • **Clerical** • **Contract**
GLClass	Used to identify the GL Class each job code is assigned to for budget and reporting salary-mapping purposes. The exception-mapping table is located in the GLPayrollMapping table. If mapping payroll by job code or pay type is not an option, this mapping table allows for special exceptions for payroll mapping.
Variable	Used to identify JobCodes, which are sensitive to volume changes. Valid entries include **Fixed** and **Variable**.
KHABgtCode	Used for combining accounts together during budget plan file creation. If there are historical values for two accounts that you want to budget as one combined account, list the surviving account number on both lines. If not combining accounts, this value should match value in the Account column. The default value is **0** (zero).
KHAInt	Used to identify which tab an account should be interfaced to during the budget plan file create process. Valid entries include the following: • **JOBCODE** • **PROVIDER** • To exclude an account from all budget plan files, type **NA**.

Column	Description
PhyInt	Used to create an alternative to the KHAInt classification for the associated job code. Valid entries include the following: • **JOBCODE** • **PROVIDER** • **NA**indicates the value will default to the value currently in the KHAInt column.
FTEFactor	(Optional depending on license) Defines the FTE factor for a two week period. Generally, this is set to 80 for all job codes. If your organization uses varying FTE Factors by job code, this may be different.
StdHours	Used to identify the standard FTE hours worked in a year. Options include Default, which is 2086 hours, and 2080.
RFCODEGL	In Axiom Rolling Forecast, this may be used to allocate salaries to specific salary related RFCodes.
RFCODEHR	In Axiom Rolling Forecast, this may be used to allocate hours to specific hours related RFCodes.
FPCategory	Used to identify the name of the Financial Planning category to be used for transferring the financial plan targets during the integration process with Axiom Financial Planning. If Axiom Financial Planning is not used, the default is **NA**.
CostHR	The Prod Hours Account Definitions for Costing
CostGL	The Prod Dollars Account Definitions for Costing
CostClass	An alternative grouping column used in the costing process that is invoked during the loading of payroll information into the CGL as statistics to support a payroll related reclassification of GL dollars or hours.
CostVariable	Not used at this time.
ResourceJobClass	Used in the RVU developer process by the mapping of job codes to a Resource Job Class, which determines the level of detailed RVU development for labor resources. This attribute is also used in the mapping of payroll hour and dollar into an average wage rate in the resource table that then drives the calculation of the RVU.
CM_PlanCode	Used for combining job codes during reporting and plan file creation in Axiom Cost Management. If there are historical values for two job codes that you want to report as one combined job code, list the surviving job code on both lines.

PAYTYPE

The PAYTYPE dimension table includes records for all of the possible categories of compensation that an employee might receive. For example, regular pay, paid time off, sick pay, incentive pay, and so on.

The following table lists all of the options available in this dimension table:

Column	Description
PAYTYPE	The Axiom Software pay type. This must be an alpha-numeric field, so that during the import process, a P is prepended to all pay types to ensure they are alpha numeric.
Description	Identifies the pay type description from the payroll system. Be as explicit as possible, avoid abbreviations, and use layman's terms. Do not enter a description using all capital letters. To remove the all-caps format in the spreadsheet, use the Proper formula =Proper().
PaySummary	Used in reporting to identify major pay categories. Valid entries include the following: • **Prod** • **NonProd** • **Other** • **Stat** • **NA**
PayDetail	Used in reporting to identify detail pay categories. Valid entries include the following: • **Contract** • **NA** • **NonProd** • **Other** • **Overtime** • **Regular** • **Stat**

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>LaborDist</td><td>The variation of PayDetail used in Labor Distribution reporting. Valid entries include the following:
Regular
Education
PTO
Overtime
OnCall
Other
Contract
Stat
NA</td></tr>
<tr><td>FTE</td><td>Indicates whether to include hours in FTE calculations. Valid entries include the following:
To assign to pay types to count for FTE calculations such as Regular, Overtime, Education, PTO, Jury Duty, Bereavement, Sick, and so on, type Yes.
To assign to pay types to not count for FTE calculations such as Differentials, Call Pay (not callback), Bonus, Benefits, and so on, type No.
To assign to your productivity stat pay types, type Stat.
If none of the above scenarios apply, type NA</td></tr>
<tr><td>Empl_Detail</td><td>Used to identify pay types that are FTE related for employee-level budgeting. Valid entries include the following:
If it is FTE-related, type Z_Employee.
If it is not FTE-related, type NA.</td></tr>
<tr><td>KHAInt</td><td>Used to identify which tab an account should be interfaced to during the budget plan file create process. Valid entries include the following:
To assign to all statistics, revenue, and deduction accounts that will be budgeted in the budget plan files, type Stat_Rev.
To assign to all expense and hours for accounts that will be budgeted in the budget plan files, type Expense.
To exclude an account from all budget plan files, type NA.</td></tr>
<tr><td>GLAcct</td><td>Used to identify the account number to use for dollars on the GL. Valid entries include the following:
If your payroll data maps to the GL-based upon job code, type 0(zero).
If your payroll data does not map to the GL-based on job code, type the GL salary account from the ACCT dimension table.</td></tr>
</table>

Column	Description
HRAcct	Used to identify the account number to use for hours on the GL. Do one of the following: • If your payroll hours map to the GL-based upon job code, type **0**(zero). • If your payroll hours do not map to the GL-based on job code, type the GL hours account from the ACCT dimension table.
JobCode	The pay type summary groupings used for plan-file processing when using the Jobcode labor method. The code used must be a valid pay type.
Staffing	The pay type summary groupings used for plan-file processing when using the Staffing labor method. The code used must be a valid pay type.
Employees	The pay type summary groupings used for plan-file processing when using the Employee labor method. The code used must be a valid pay type.
Providers	The pay type summary groupings used for plan-file processing when using the ProviderComp labor method. The code used must be a valid pay type.
KHAStdLine	Used to identify default budget methodology used in budget plan files during budget plan file creation. Refer to the calc methods for the Stat_Rev sheet and Expense sheet in the *Axiom Budgeting and Performance Reporting Administrator's Guide* (Budget Plan Files chapter) for valid entries and definitions. The default value is **NA**.
CDMStdLine	Used to identify default budget methodology for CDM budget plan files (departments which have CDMStdLine in KHACMDimGrp column of DEPT Dimension) during budget plan file creation. It is used similarly to KHAStdLine in Budget Planning workbooks. Valid entries include the following: • Statistical accounts = CDMStatistic • IP Revenue accounts = CDMIPRevenue • OP Revenue accounts = CDMOPRevenue Copy the remaining account assignments from KHAStdLine column.
Accrue	Used to identify paytypes to be included when using the payroll accrual utility. Valid entries include the following: • To accrue during monthly payroll accrual process, type **Yes**. • To not accrue during monthly payroll accrual process, type **No** or **NA**.
RFPAYCLASS	Not used at this time.
CostVariable	Not used at this time.

Column	Description
CM_PlanCode	Used for combining pay types during Axiom Cost Management reporting and plan-file creation. If there are historical values for two pay types that you want to report as one combined pay type, list the surviving pay type on both lines.
CM_PayCategory	Used in Axiom Cost Management to group individual pay types into summary categories for planning purposes. Examples include the following: Regular, Overtime, Education, PTO, Contract, Other, Stat.
CM_Paid	Used to identify the pay type to include in the Paid Hours calculations in Axiom Cost Management. Valid entries include the following: • For paytypes that will be included in paid hours, select **Yes**. • For paytypes that will not be included in paid hours, select **No**.
CM_Worked	Used to identify the pay type to include in the Worked Hours calculations in Axiom Cost Management. • For Pay Types that will be included in worked hours, select **Yes**. • For Pay Types that will not be included in worked hours, select **No**.
CM_PaidDLLRS	Used to identify the pay type to include in the Paid Dollars calculations in Axiom Cost Management. • For Pay Types that will be included in paid dollars, select **Yes**. • For Pay Types that will not be included in paid dollars, select **No**.
CM_WorkedDLLRS	Used to identify the pay type to include in the Worked Dollars calculations in Axiom Cost Management. • For Pay Types that will be included in worked dollars, select **Yes**. • For Pay Types that will not be included in worked dollars, select **No**.
ResourceCalculation	Determines the calculation behavior for the hours or dollars within the PAYTYPE when using the payroll information within the RVU development process. When labor rates are calculated for the Resource Table, the designation here determines if the Hours, Dollars, or Both are to be used in the numerator and denominator in the average.
CMStdLine	Used during the interface process to assign the standard planning method to use for each pay type. In other words, this identifies the desired formula to use to calculate Axiom Cost Management initiatives. It is used similarly to KHAStdLine in Budget Planning workbooks.

Options for Acct.FSDetail

- A_AccumDepr
- A_AR
- A_ARAllow
- A_BoardInvest
- A_BondAmort
- A_BondCost
- A_Cash
- A_CashInvest
- A_CIP
- A_CurLtdAsset
- A_CurOtherAsset
- A_CurReceivable
- A_Inventory
- A_Land
- A_LTNotesRec
- A_LTOtherAsset
- A_PPE
- A_Prepaid
- A_RelatedParty
- A_ThirdPartyRec
- A_Trusteed
- C_Comments
- D_BadDebt
- D_Charity
- D_Contractual
- D_Discounts
- E_BadDebt
- E_Benefits
- E_Depreciation
- E_Drugs
- E_Insurance
- E_Interest
- E_MaintRepairs
- E_MedSupplies
- E_OtherExp
- E_OthSupplies

- E_ProFees
- E_PurchSvcs
- E_RentLease
- E_Salaries
- E_SalariesContract
- E_SalariesMid
- E_SalariesPhy
- E_Utilities
- F_ContractFTEs
- F_NonProdFTEs
- F_OvertimeFTEs
- F_ProdFTEs
- H_Contract
- H_JCHours
- H_Midlevel
- H_NonProd
- H_Overtime
- H_Physician
- H_Prod
- L_AccExpense
- L_AccPayroll
- L_AP
- L_CurLTDebt
- L_CurOthLiab
- L_LTDebt
- L_LTOther1
- L_LTOther2
- L_ThirdPartyPay
- M_BmarkAdjD
- M_BmarkNOR
- M_DEPUOS
- M_NonLabor
- M_ONLPUOS
- M_PSPUOS
- M_SEPUOS
- M_TContPct
- M_TEducPct
- M_TEPUOS

- M_TFTERate
- M_TOTPct
- M_TPHUOS
- M_TUOSRate
- M_TWHPUOS
- N_NetAsset
- N_NetAssetPerm
- N_NetAssetTemp
- NA
- Q_Restricted
- Q_RestrictedPerm
- Q_RestrictedTemp
- Q_Unrestricted
- R_IPRev
- R_NonOpContrib
- R_NonOpExtraord
- R_NonOpGainLoss
- R_NonOpInterest
- R_NonOpInvest
- R_NonOpOther
- R_NonOpRev
- R_OPRev
- R_OtherRev
- R_OthPtRev
- S_Admits
- S_Deliveries
- S_Discharges
- S_Encounters
- S_ER Visits
- S_GenStat
- S_Global
- S_KeyIP
- S_KeyOP
- S_KeyOth
- S_Newborn
- S_OthStat
- S_PatientDays
- S_PayorDays

- S_PayorDisch
- S_PayorVisits
- S_StatOth
- Z_Exclude

Managing users

In order to give users access to data in Axiom Comparative Analytics, the System Security Administrator will need to assign users to roles. There are six roles in Axiom Comparative Analytics: Entity, Dept, JobCode, Salary, Admin, and Peer Group Request. Role assignments will control a user's ability to access data. To learn more about these roles, see Understanding Comparative Analytics user roles.

As the System Security Administrator, you will use the **Security Manager** utility in the Axiom Excel Client to assign users to or remove users from the Comparative Analytics subsystem. You will then use the **Comparative Analytics Security Update** utility to manage user access

NOTE: Although it is technically possible to use the Security Manager to assign users to the Comparative Analytics subsystem, we recommend that you use the Security Update utility as this method is the only way to define specific table filters for each user.

IMPORTANT: The instructions in this section assume that you have already set up users and filters. For instructions on adding new users or filters, reference the Configuring and Managing Security chapter of your Performance Reporting Admin Guide.

Understanding Comparative Analytics user roles

Axiom Comparative Analytics uses user role assignments to determine a user's ability to view and modify specific data throughout the application dashboards. The roles are as follows:

- Entity Role - Access to organizational-level data in the Entity table.
- Dept Role - Access to department-level data in the Dept table.
- JobCode Role - Access to labor related data in the JobCode table.
- Salary Role - Access to salary rate data in the Salary table.
- Admin Role - Access to perform both the Peer Group request and the peer group table update, but does not give access to any other assets. To access the other assets, this role needs to be combined with other roles.
- Peer Group Request Role - Access to create peer group requests, but this role does not give access to any other assets. To access other assets, this role needs to be combined with other access roles.

Role-based filter and measurement access

The table below defines the filter data that users have access to based on their role. You may have one or more roles assigned to you. To learn how to assign roles, see Using the Security Update utility to manage user access.

	Entity Role	Dept Role	Jobcode Role	Salary Role	Admin Role	Peer Group Request Role
Peer Explorer Dashboard	X	X				
Department-Level filters on all dashboards		X				
Entity-Level filters on all dashboards	X					
JobCode/labor measures on all dashboards			X			

	Entity Role	Dept Role	Jobcode Role	Salary Role	Admin Role	Peer Group Request Role
Salary rate measures on all dashboards				X		
Data Filter (All Tables)	User Specific based on Financial Table Filters	User Specific based on Financial Table Filters	User Specific based on Financial Table Filters	User Specific based on Financial Table Filters		
Peer Group Table Update					X	
Peer Group Request					X	X
Launch Data Retrieval					X	

Suggested role assignments

The table below lists suggested Axiom Comparative Analytics role assignments based on the user's position within your organization. You are not required to follow this role setup, but it may be helpful if you're just starting out.

Role within your organization	Entity Role	Dept Role	Jobcode Role	Salary Role	Admin Role	Peer Group Request Role
CFO or other users you want to have full access to all data.	X	X	X	X		
VP, Director, Manager or other users that should have access to department, labor, and salary rate data.		X	X	X		
Manager or other users that should have access to department and labor data but **not** salary rates.		X	X			
Manager or other users that should have access to labor and salary rate data.			X	X		

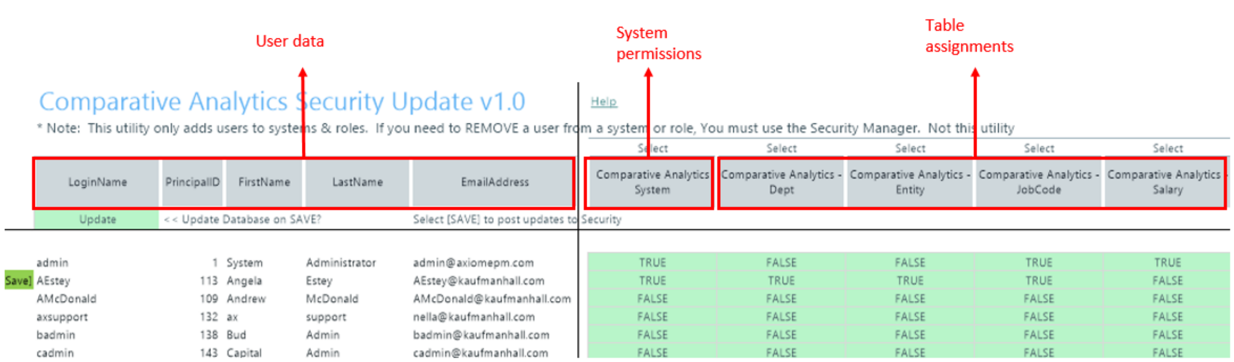
Role within your organization	Entity Role	Dept Role	Jobcode Role	Salary Role	Admin Role	Peer Group Request Role
Axiom System Administrator or other user with other Axiom product administration roles such as Budget Planning or Performance Reporting who maintains the Axiom software. Typically, on the Finance team.					X	X

Using the Security Update utility to manage user access

The Comparative Analytics Security Update Utility is an easy way to grant existing users access to the Comparative Analytics subsystem, assign roles/tables, and set filters for each table associated with a specific user.

> **NOTE:** You cannot add or remove users using this utility. You can only do that in the Security Manager utility. However, we recommend you use this utility for all other security functions.

You will use this utility to grant users access and assign roles in the same place. The image below illustrates the column categories:



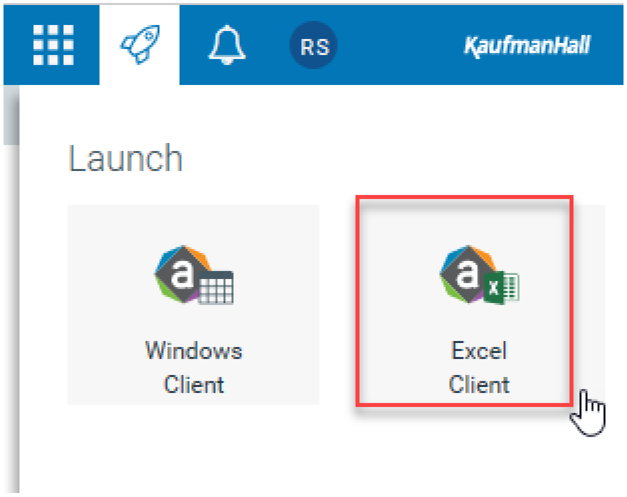
Comparative Analytics Security Update v1.0 Help

* Note: This utility only adds users to systems & roles. If you need to REMOVE a user from a system or role, You must use the Security Manager. Not this utility

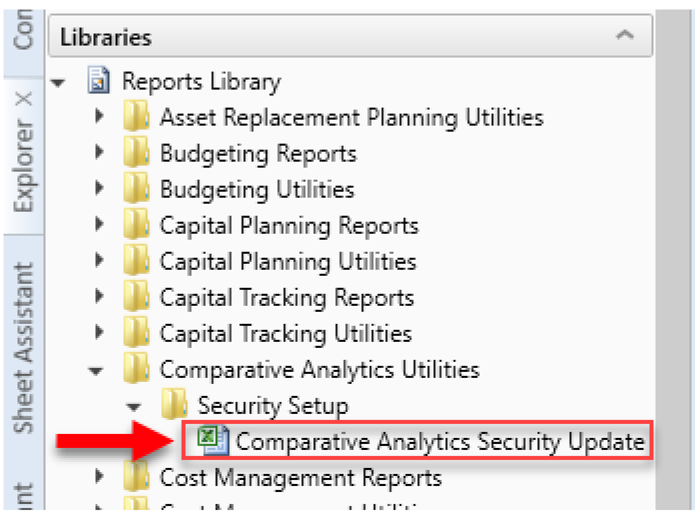
	LoginName	PrincipalID	FirstName	LastName	EmailAddress	Select Comparative Analytics System	Select Comparative Analytics - Dept	Select Comparative Analytics - Entity	Select Comparative Analytics - JobCode	Select Comparative Analytics - Salary
	Update	<< Update Database on SAVE?			Select [SAVE] to post updates to Security					
	admin	1	System	Administrator	admin@axiomepm.com	TRUE	FALSE	FALSE	TRUE	TRUE
Save]	AEstey	113	Angela	Estey	AEstey@kaufmanhall.com	TRUE	TRUE	TRUE	TRUE	FALSE
	AMcDonald	109	Andrew	McDonald	AMcDonald@kaufmanhall.com	FALSE	FALSE	FALSE	FALSE	FALSE
	axsupport	132	ax	support	nella@kaufmanhall.com	FALSE	FALSE	FALSE	FALSE	FALSE
	badmin	138	Bud	Admin	badmin@kaufmanhall.com	FALSE	FALSE	FALSE	FALSE	FALSE
	cadmin	143	Capital	Admin	cadmin@kaufmanhall.com	FALSE	FALSE	FALSE	FALSE	FALSE

To open the Comparative Analytics Security Update Utility:

1. Click the **spaceship** icon to open the launch menu.
2. Click **Excel Client**.



3. In the **Explorer** tab, in the **Libraries** section, click **Reports Library > Comparative Analytics Utilities > Security Setup**.
4. Double-click **Comparative Analytics Security Update**.

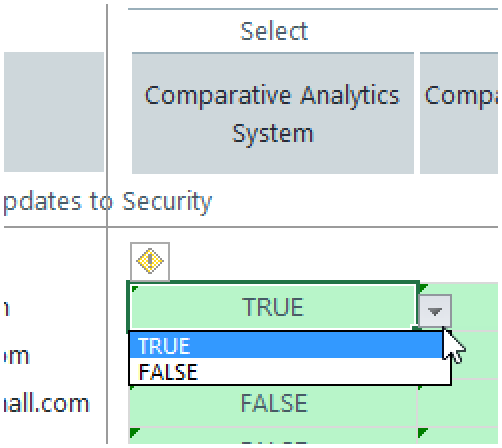


Granting access to Comparative Analytics

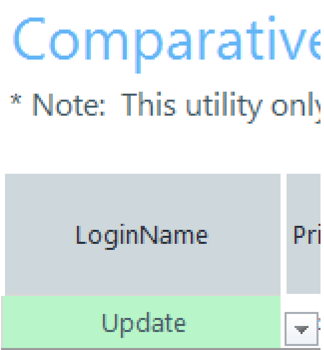
To grant users access to Comparative Analytics:

1. Click the cell in the **Comparative Analytics System** column corresponding to the user receiving access to activate the drop-down menu.
2. Click the arrow to open the drop-down menu and click **TRUE** to grant access to Comparative

Analytics. A **FALSE** value would revoke access.



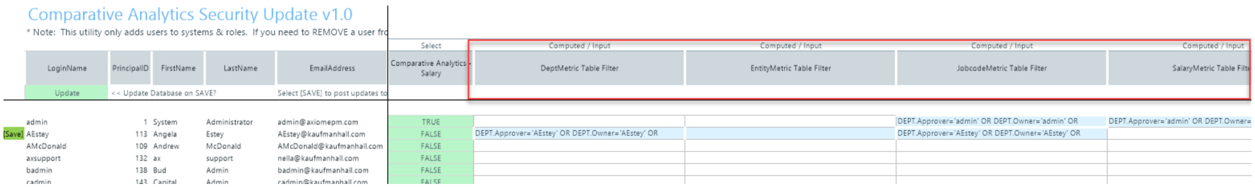
3. Click the user role cell(s) that apply to that user in the relevant user role assignment column and open the drop-down menu.
4. Before you save changes, make sure the green cell in the **LoginName** column indicates **Update**.



5. Click **Save**

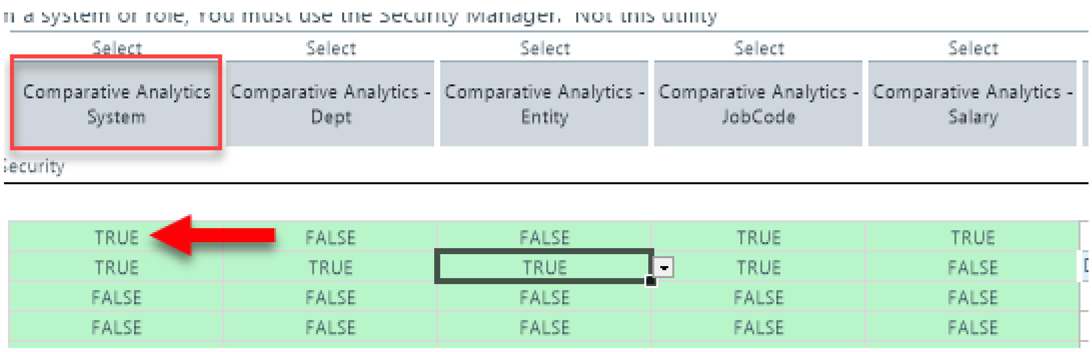
Managing table and filter access for Comparative Analytics

Your implementation consultant will assign default filters for the DeptMetric, JobcodeMetric, and Salary table filters, but you can modify them using the columns to the right of the table access columns.

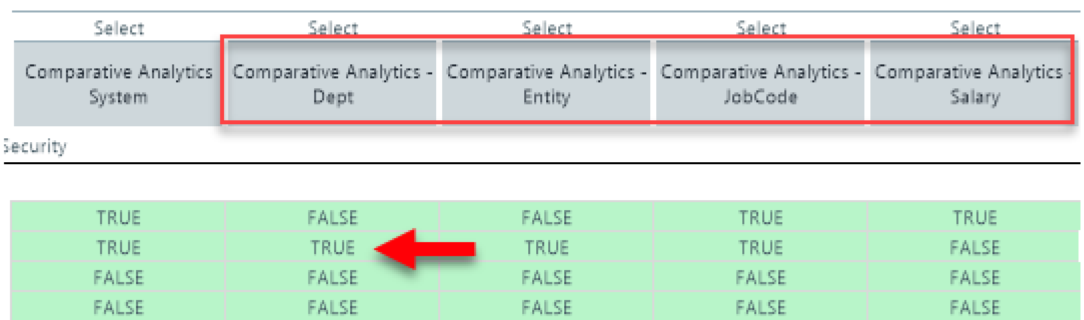


To grant table access to a user:

1. In the **Comparative Analytics System** column, click **TRUE** from the drop-down menu in any green cell.This grants access to the system for the user associated with that cell.



2. In the table assignment columns, click **TRUE** from the drop-down menu in any green cell. This grants access to the table associated with that column to the user associated with that cell.



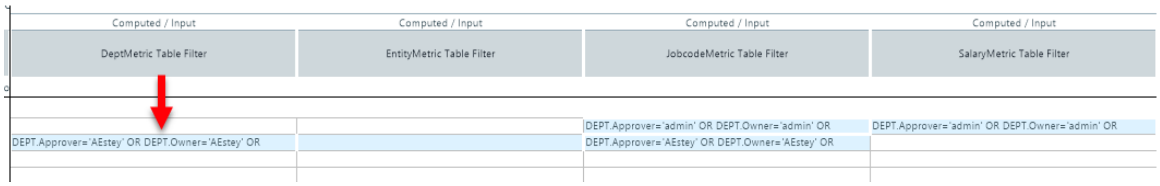
You can modify or add filters once you assign the tables. This allows you to customize filter access for specific users within their assigned tables. You can edit any of the blue cells in the Table Filter columns.

To modify or add filters associated with tables:

NOTE: Although we assign default filters for the DeptMetric, JobcodeMetric and Salary Table filters, you will have to enter values for the EntityMetric Table filter manually.

1. If neccesary, use the scroll-bar at the bottom of the spreadsheet to scroll to the right of the table assignment columns.

2. Click any blue cell in the Table Filter columns to enter or edit table filters.



3. Click **Save**.

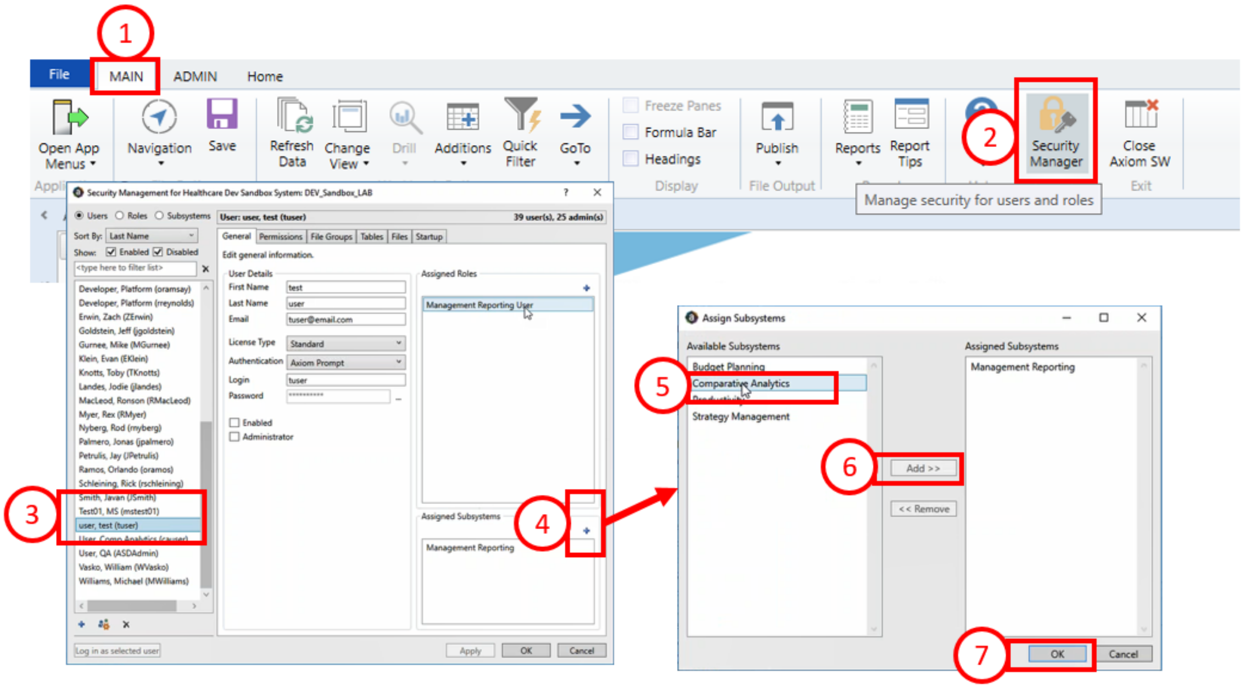
Using the Security Manager to manage user access

You can also use the Security Manager utility to assign users to, or unassign users from, the Axiom Comparative Analytics subsystem and assign roles/tables. However, you will need to use the Security Update utility to set filters for each table associated with a specific user. For this reason, we recommend that you use the Security Update utility for those operations.

To assign users to the Axiom Comparative Analytics subsystem:

1. In the Axiom Windows Client, open the **Main** toolbar.
2. Click **Security Manager**.
3. On the **Security Management** dialog that displays, click a user from the column on the left.
4. In the **General** tab, click the + icon on the **Assigned Subsystems** portion of the tab if the user has not been assigned to the Comparative Analytics subsystem. Skip steps 5-7 if Comparative Analytics displays in the **Assigned Subsystems** list.
5. On the dialog that displays, Click Comparative Analytics from the **Available Subsystems** column.
6. Click **Add**.
7. Click **OK**.

NOTE: Users that you can assign roles to already have a **Performance Reporting Admin** role assigned to them in the **Assigned Roles** box on the right. They will already have read and write filter permissions created for them in the **Filter** table located on the **Tables** tab of the **Security Manager**.



To unassign users from the Axiom Comparative Analytics subsystem:

1. In the Axiom Windows Client, open the **Main** toolbar.
2. Click **Security Manager**.
3. On the **Security Management** dialog that displays, click a user from the column on the left.
4. In the **General** tab, click the + icon on the **Assigned Subsystems** portion of the tab if the user has been assigned to the Comparative Analytics subsystem.
5. On the dialog that displays, Click Comparative Analytics from the **Assigned Subsystems** column.
6. Click **Remove**.
7. Click **OK**.

Managing user access to Axiom Intelligence

Managing user access to Axiom Intelligence (also known as the Expense Improvement Opportunity dashboard) may require manual adjustments to Department or Entity filters at the user level.

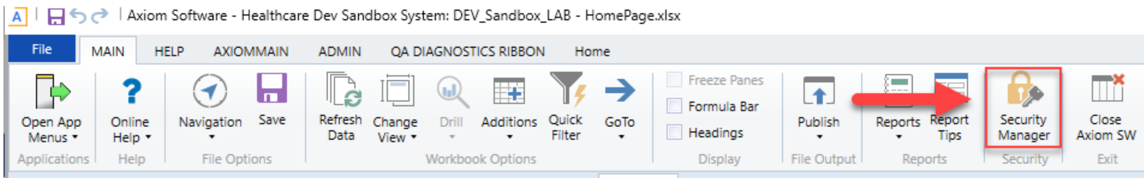
Users must have, at least, the Comparative Analytics Department role to have access to the Expense Improvement Opportunity Dashboard. This dashboard provides several different levels of reporting that include both entity and department data. Specifically, Executive and Enterprise level reports provide entity data in addition to department data. As a result, system administrators need to assign users at the Executive and Enterprise level with an entity filter to see the entity metrics displayed in the Enterprise and Executive-level reports.

If you are using the default department filter, you do not need to make any changes to the filters assigned to the Comparative Analytics Department role. If you have a custom department filter, you must change the filter at the user-level for each user that needs access to any of the reports in the Expense Improvement Opportunity Dashboard.

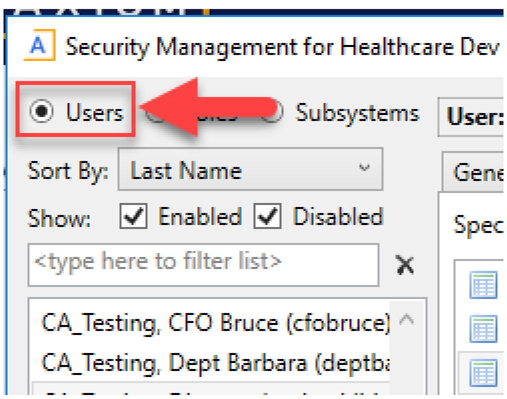
> **NOTE:** The default department filter is DEPT.Approver = '{CurrentUser.LoginName}' OR DEPT.Owner = '{CurrentUser.LoginName}' OR DEPT.Reviewer = '{CurrentUser.LoginName}'.

To apply an Entity filter for users to use this dashboard:

1. In the Windows Client, in the **Main** ribbon, click **Security Manager**.

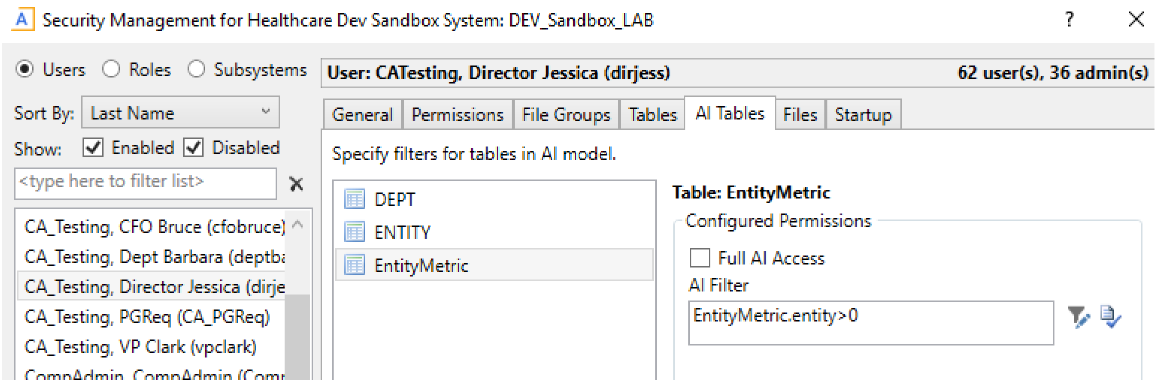


2. In the Security Management dialog that displays, click **Users**.



3. In the user list, click the name of the user whose filter you are editing.
4. Click the **AI Tables** tab.
5. Click **EntityMetric**.

6. In the **AI Filter** text box, type: **EntityMetric.entity>0**.



7. Click **OK**.

To apply a Department filter for users to use this dashboard:

1. In the Windows Client, in the **Main** ribbon, click **Security Manager**.
2. Click **Users**.
3. In the user list, click the name of the user whose filter you are editing.
4. Click the **AI Tables** tab.
5. Click **DEPT**.
6. In the **AI Filter** text box, type: **dept>0**.
7. Click **OK**.

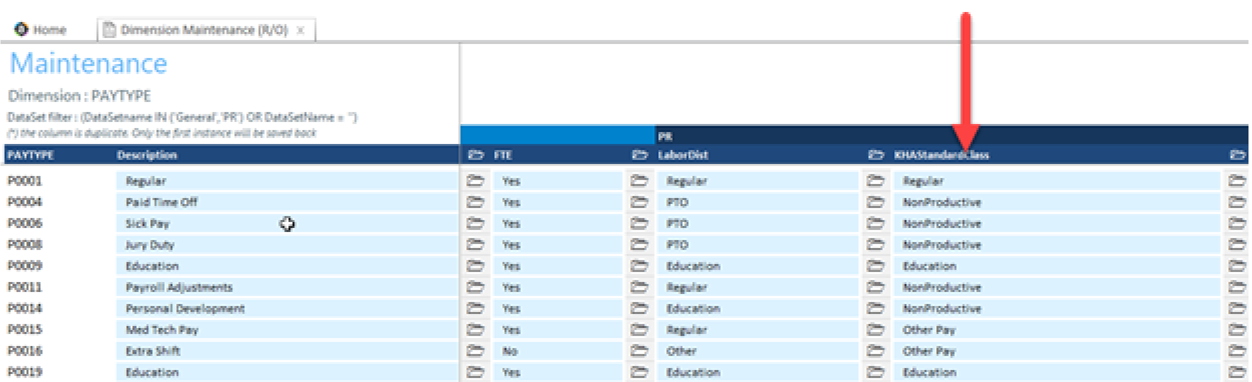
Setting up data mapping for Comparative Analytics

The Axiom Comparative Analytics system will attempt to automatically populate the KHAStandardclass column, but the default mapping may not be correct. As a result, some filter options in Axiom Comparative Analytics may display as "Not-mapped" in the user interface if the system administrator does not ensure that the **KHAStandardclass** column data is correctly mapped in all dimension tables. Before users begin using Axiom Comparative Analytics, you must update the **KHAStandardclass** column in **each** of the following dimension tables:

- Entity
- Dept
- ACCT
- Jobcode
- Paytype

NOTE: For more information on updating dimension tables, see Working with the Dimension Maintenance utility.

The **KHAStandardclass** column is used when collecting data for grouping and determining peer groups and is used in filters to identify areas to review. Unmapped values will display as "Not-mapped" in filters depending on user table filters in Management Reporting.

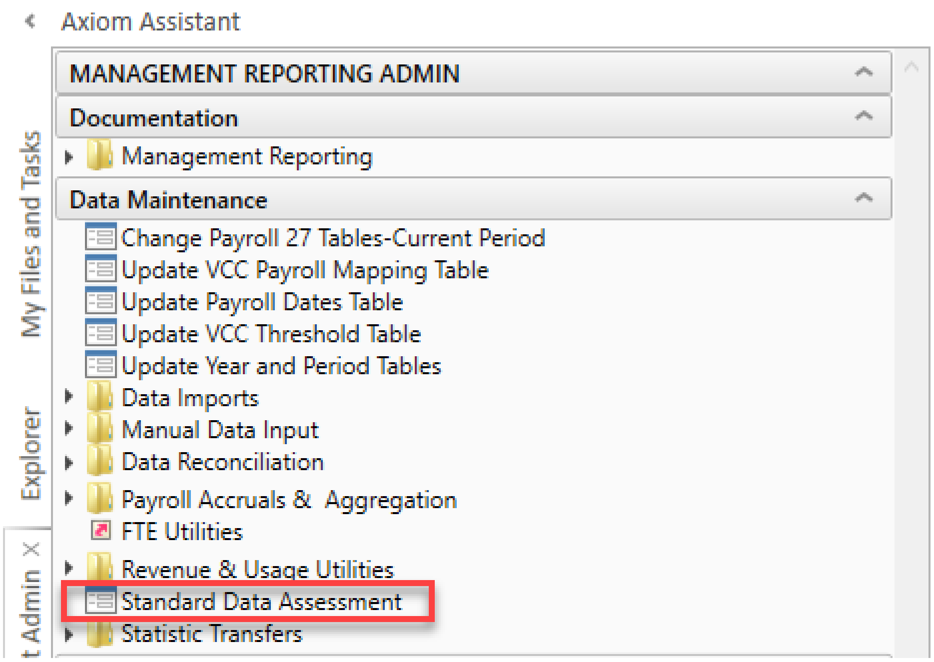


NOTE: The **KHAStandardclass** column needs to be updated in *each* dimension table.

To ensure continuous compliance, review the **Standard Data Assessment** report and update dimension tables as needed.

To review the Standard Data Assessment report:

1. In **Management Reporting Admin** task panes, in the **Data Maintenance** section, double-click **Standard Data Assessment**.



2. In the Standard Data Assessment report that displays, you will see a green check mark in the **KHA Standard Class** column as illustrated below. If you do not see a green check mark, then you need to update the dimension tables again.