Release Notes
Axiom Comparative Analytics
Version 2019.4

KaufmanHall
AXIOM

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Summary

Kaufman Hall is pleased to announce the 2019.4 release of Axiom Comparative Analytics. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.

2. **Schedule an installation date** – Contact support@kaufmanhall.com or your implementation consultant, and they will confirm an installation period with you.

3. **Complete manual updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

> **IMPORTANT:** Please read the Manual Setup instructions for important information related to upgrading this version.

Support

As always, we appreciate your commitment to Kaufman Hall. If you have any questions about your upgrade, please contact us by logging into Axiom, clicking **Help**, then clicking **Support**.

Training

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

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

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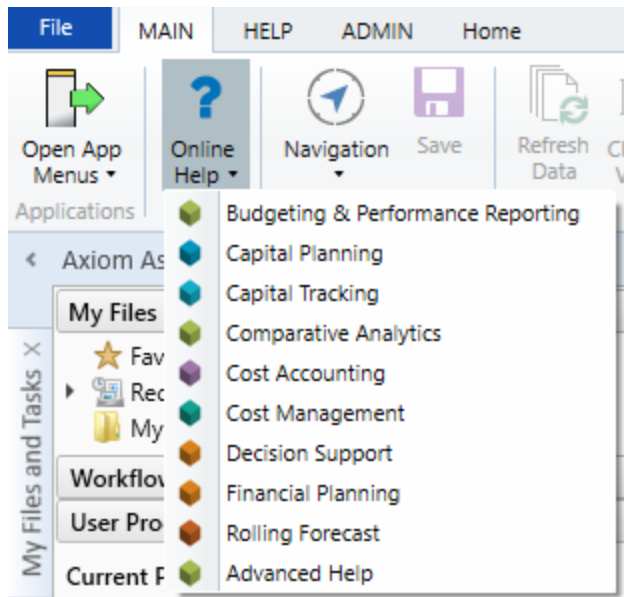
- **Contextual help** - Form/web-enabled features include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right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

Product upgrade notes

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

When upgrading to Axiom Comparative Analytics 2019.4, keep in mind the following:

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

New features summary

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

Expense Improvement Opportunity Dashboard

Use the Expense Improvement Opportunity Dashboard to review expense improvement opportunities at the Enterprise, Executive, Multi-Department, and Department levels.

> **NOTE:** You must have, at least, the Comparative Analytics Department role to have access to the Expense Improvement Opportunity Dashboard.
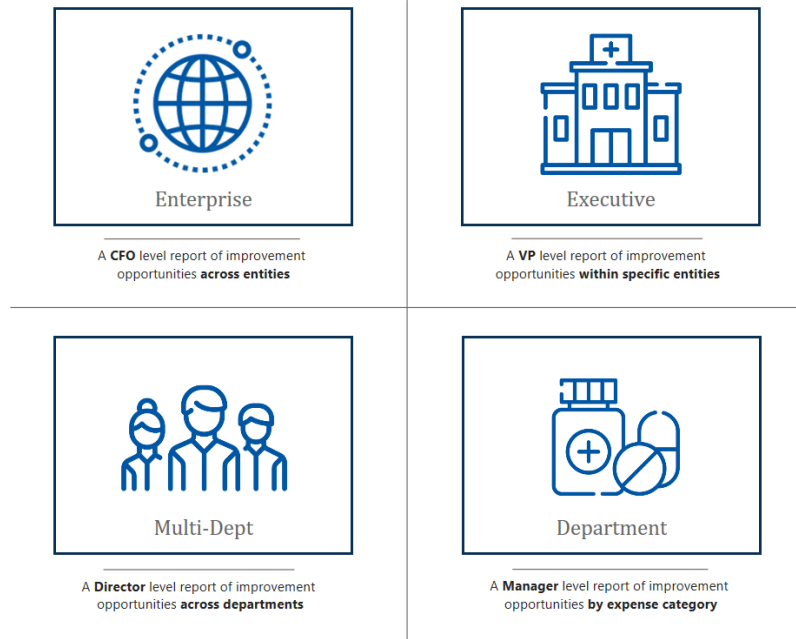
To open this dashboard, click the Expense Improvement Opportunity Dashboard link on the Axiom Comparative Analytics home page.
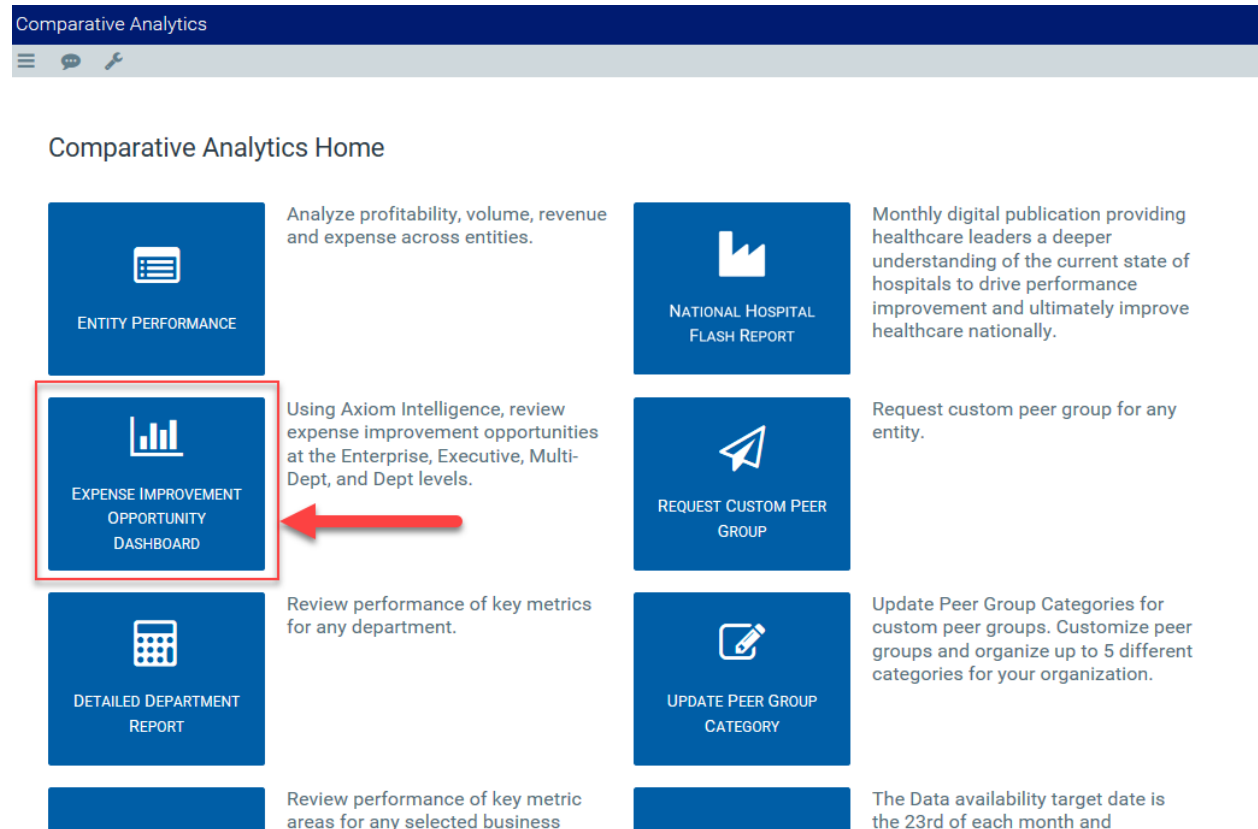
The dashboard page displays links to four different reporting levels: Enterprise, Executive, Multi-Department, and Department. Each of the various reporting levels is intended for use by certain levels within your organization. For example, the Enterprise-level report is intended for use at the CFO-level of your organization. A user with only a Comparative Analytics Department role can access the Enterprise-level report, but will see limited data and the report will not be as useful as the Department-level report.

Expense Improvement Opportunity Dashboard

Enterprise

A **CFO** level report of improvement opportunities **across entities**

Executive

A **VP** level report of improvement opportunities **within specific entities**

Multi-Dept

A **Director** level report of improvement opportunities **across departments**

Department

A **Manager** level report of improvement opportunities **by expense category**

Each report level displays filter options, top expense improvement opportunities, and top total expense variance (budget, peer, and three month average).

In addition, the Enterprise and Executive report levels display KPI measurements of month-over-month performance for the last 12 months.

| Report level	Description
Enterprise	A CFO-level report of improvement opportunities across all entities associated with the user.
Executive	A VP-level report of improvement opportunities within a single entity associated with the user. For use by users in charge of multiple functional areas or service lines.
Multi-department	A Director-level report of improvement opportunities across departments associated with the user. For use by users in charge of multiple departments.
Department	A Manager-level report of improvement opportunities within a department by expense category. For use by users in charge of a single department.

In each report level, the Top Expense Improvement Opportunities area uses Kaufman Hall's proprietary algorithm based on plan, trend, and peer to display the greater potential opportunities for expense reduction as larger boxes while fewer opportunities have smaller boxes. Darker shades of blue indicate a larger score while lighter colors indicate a lower score based on the outcome of the algorithm.

Top Expense Improvement Opportunities

In each report level, the Total Expense Variance graphs provide context to how potential opportunities are identified. Axiom Comparative Analytics derives a composite score for opportunities based on three factors: plan (budget) variance, trend (three-month average) variance, and peer variance.

The Executive, Multi-Department, and Department reports allow you to click an arrow at the far-right of the report to see detail on rank, percentiles, and individuals related to a specific service line or department that you select in the Top Expense Opportunities section of the report.

Right-click any box in the Top Expense Improvement Opportunities section to drill-down from Enterprise, Executive, and Multi-Department reporting levels and view data with increased levels of detail. For example, you can right-click on an entity box in the Top Expense Improvement Opportunities area of the Enterprise-level report to view data on that specific entity in the Executive-level report.
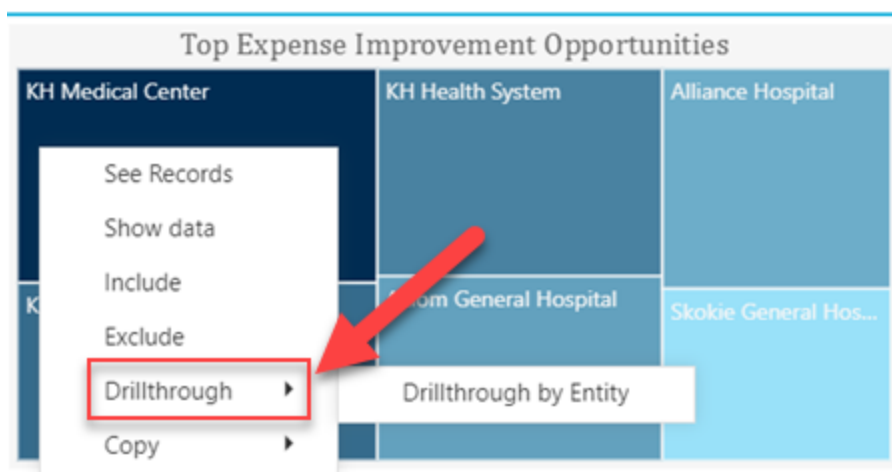
▶ User roles and filters

You must have a Comparative Analytics Department role assigned to access any of the reports in this dashboard.

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

You need an Entity filter assigned to see the entity metrics displayed in the Enterprise and Executive-level reports.

To apply an Entity 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 **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.DEPT>0**.

7. Click **OK**.

Period filter options

You can now select Fiscal YTD or Rolling 12 from the **Change Period** drop-down in the **Filter** menu (when data becomes available).

Rolling 12 is the most recent 12 months of data.

Fiscal YTD is based on the client-defined fiscal year and is the first month of the client's fiscal year through the most recent month of data.
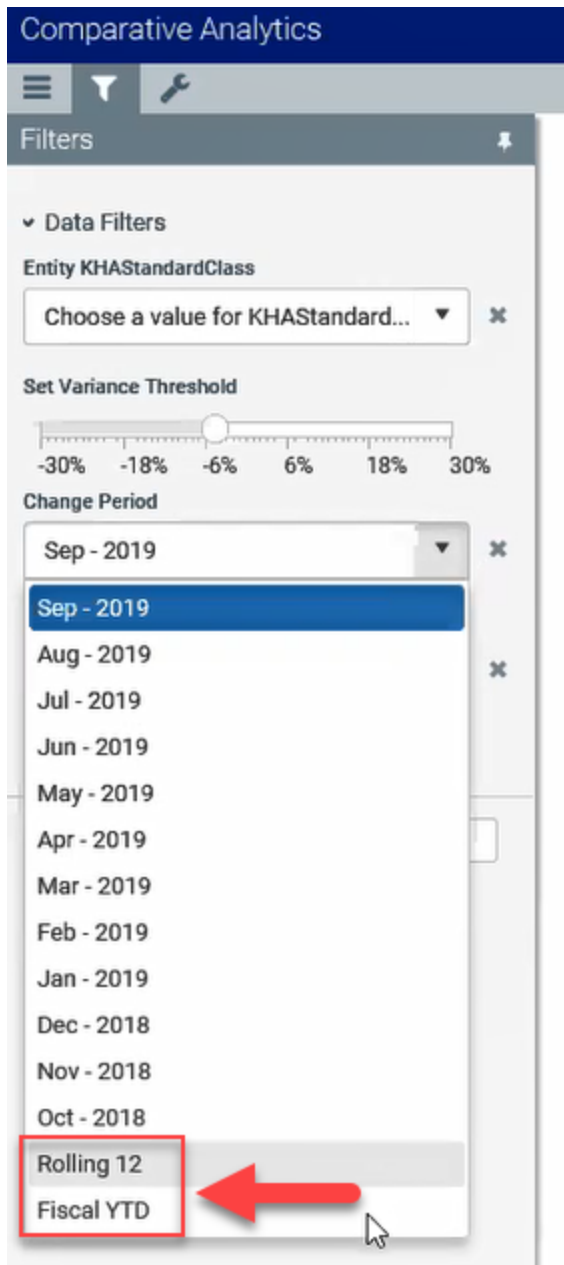
Issues resolved in 2019.4

The following table lists the resolutions for issues addressed in 2019.4:

Issue Description	Description
Performance Reporting upgraded with Comparative Analytics and should be separate [TFS 39355]	**Symptom:** When Comparative Analytics upgrades are applied the Performance Reporting upgrade is applied simultaneously. Clients want to upgrade Comparative Analytics and Performance Reporting products separately. **Resolution:** Performance Reporting product is no longer upgraded simultaneously with Comparative Analytics.
Detailed Department Report (DDR) Volume Selection should not show as an option Metrics where actual equal 0 [TFS 38771]	**Symptom:** The Volume Statistic drop-down in the Filter menu does not display relevant values when all months in the DeptMetric table equal zero. **Resolution:** Corrected by updating DDR values so that the Volume Statistic drop-down displays relevant values when the DeptMetric table months are equal to a non-zero value. The Volume Statistic drop-down value does not display when the DeptMetric table months are equal to zero.
Detailed Department Report (DDR) Peer Group Does Not limit to Peer Category.ActiveforDashboards [TFS 39802]	**Symptom:** On the DDR, Comparative Analytics does not limit the peer groups where Peer Category.ActiveforDashboards=True. **Resolution:** Corrected by updating DDR values.