Administrator's Guide

Axiom Strategy Management

Version 2020.1

KaufmanHall

AXIOM

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Welcome to Axiom Axiom

Axiom Strategy Management is a component of the Kaufman Hall Axiom Healthcare Suite of financial solutions. The Axiom Healthcare Suite products support an iterative, continuous cycle in which strategic plans define day-to-day operational targets while operational data informs long-term strategic planning. Axiom Strategy Management supports this process by giving you the tools needed to monitor and manage how well your organization’s day-to-day activities align with its strategic plans, and the goals and processes that support them. Axiom Strategy Management enables you to translate strategy to execution in a measurable way, then feed those measurements back into the system to improve financial outcomes and overall organizational efficiency and productivity.

What is covered in this document

This manual is written for Axiom Strategy Management Administrators. These individuals in your organization are tasked with configuring, maintaining, and controlling other users' access to Axiom Strategy Management-related features and data.

As an administrator, you have access to features and menus that are unavailable to regular end users such as department managers, non-finance executives, and other stakeholders. In some cases, the same screen or workbook might display slightly different in your interface than it would for an end user.

What’s new

Welcome to Version 2020.1 Axiom Strategy Management!

There are no new features for this release.

1

Implementing best practices for Axiom Strategy Management

Though Axiom Axiom is highly configurable, it does make a few general assumptions about how your organization should structure the strategy management process.

While every organization's situation is unique, it has been our experience that organizations typically get the best results when their strategy management process:

- Receives full support from a well-informed management team.
- Is rigorous and highly organized.
- Links financial planning and capital planning to the organization’s strategic plan.
- Encourages rational comparisons between projects and strategic initiatives throughout the entire organization.
- Provides a financial context for allocation decisions.
- Accounts for the strategic, mission, and operational aspects of alternative investment decisions.

Understanding Axiom Strategy Management

Axiom Software products store your organization's data (financial data, labor data, key statistics, and so on), in a central database, and then pull that data into the interface where you can view, enter, or modify the data using familiar spreadsheet commands. Axiom Strategy Management also provides a spreadsheet-based interface from the Desktop Client, but except for a few administrative tasks, you can access features and functions through the Web Client. The majority of this guide covers using Axiom Strategy Management in the Web Client.

Axiom Strategy Management basic components

Axiom Strategy Management picks up where your mission statement leaves off. The system consists of three main levels: Perspectives, Objectives, and Initiatives. Each level in the strategy hierarchy is supported by the ones below it. The following graphic is simplified to illustrate the different levels, but in reality, Perspectives can have multiple Objectives, and Objectives can have multiple Initiatives. Measures are applied to each element at each level in the hierarchy, and so support the entire hierarchy.

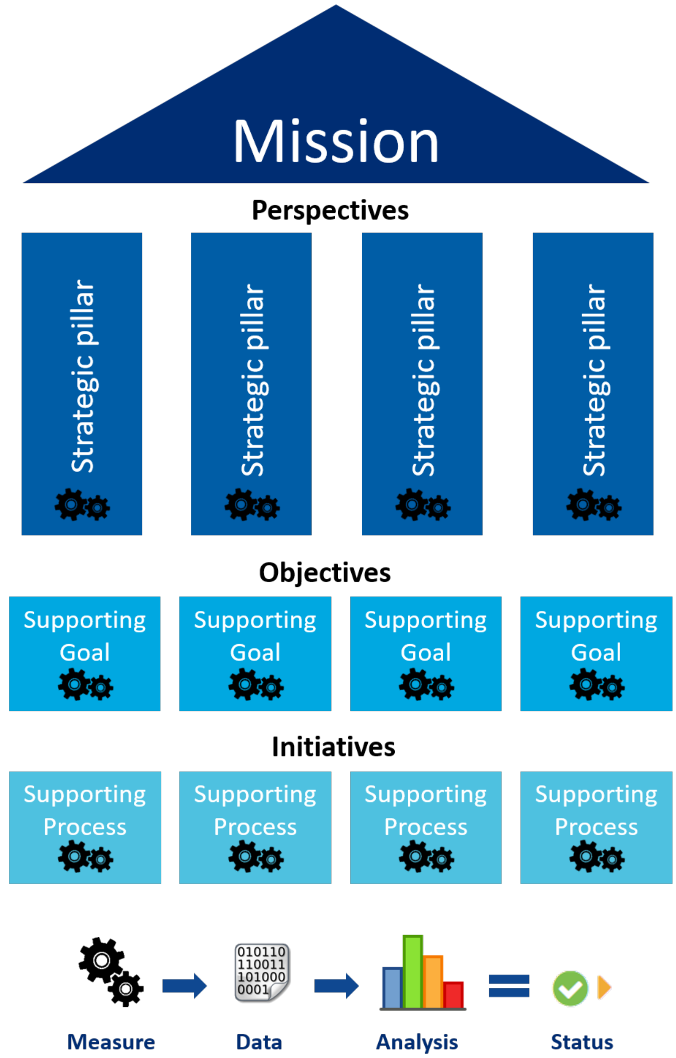
Perspectives – Strategic pillars that uphold your organization's mission. For example, if your organization is a hospital, one of your Perspectives might be Clinical Performance or Community Health Leader. Each Perspective has one or more associated Objectives.

Objectives – Goals that support your organization's Perspectives. Each Objective belongs to only one Perspective. Each Objective is associated with one or more Initiatives.

Initiatives – Processes and procedures that employees perform to support the Objectives. Each Initiative belongs to only one Objective.

Measures – Data collectors used to determine the performance status of the items to which they are applied.

As illustrated by the process diagram at the bottom of the graphic, each measure collects data that the system uses to determine how well the strategy elements are performing. Based on this analysis, the system applies Key Performance Indicator icons to the elements to provide at-a-glance status updates.



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Getting Started

This chapter covers navigating the Axiom Strategy Management interface, including logging in and out of the system and familiarizing yourself with the Web Client and Desktop Client.

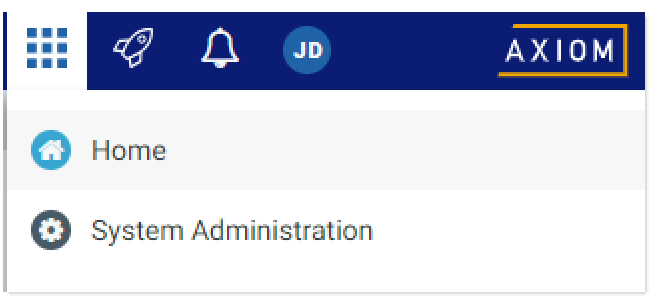
Unlike other Axiom Software products, Axiom Strategy Management is designed to be used almost exclusively in the Web Client. However, as an administrator, you need to be familiar with the Desktop Client because some administrative tasks currently cannot be performed in the Web Client.

Home page

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

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

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

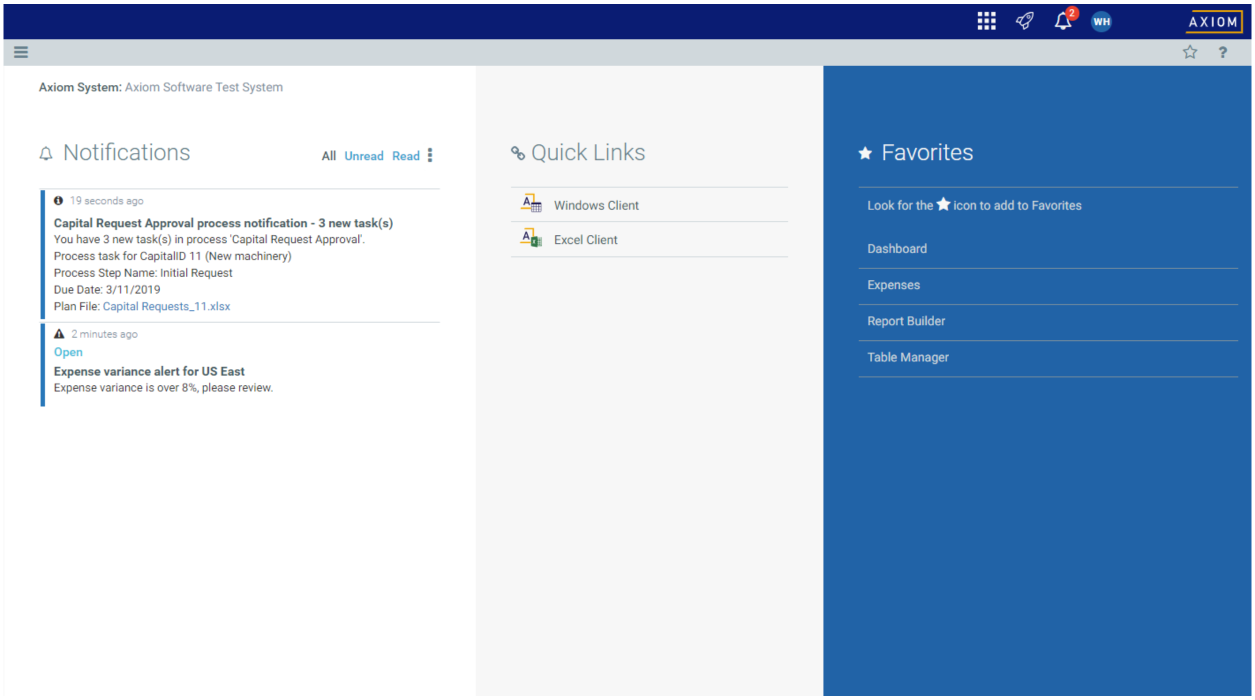


Home option on Area menu

If you are in a system with installed products, the Area 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 assigned browser-based home page, then the Web Client displays a default home page. The default home page displays notifications, favorites, and quick links.



Example default home page

This default home 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://`*`ClientName`*`.axiom.cloud/Home/Launchpage`

Where *ClientName* is the name of your Axiom 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.

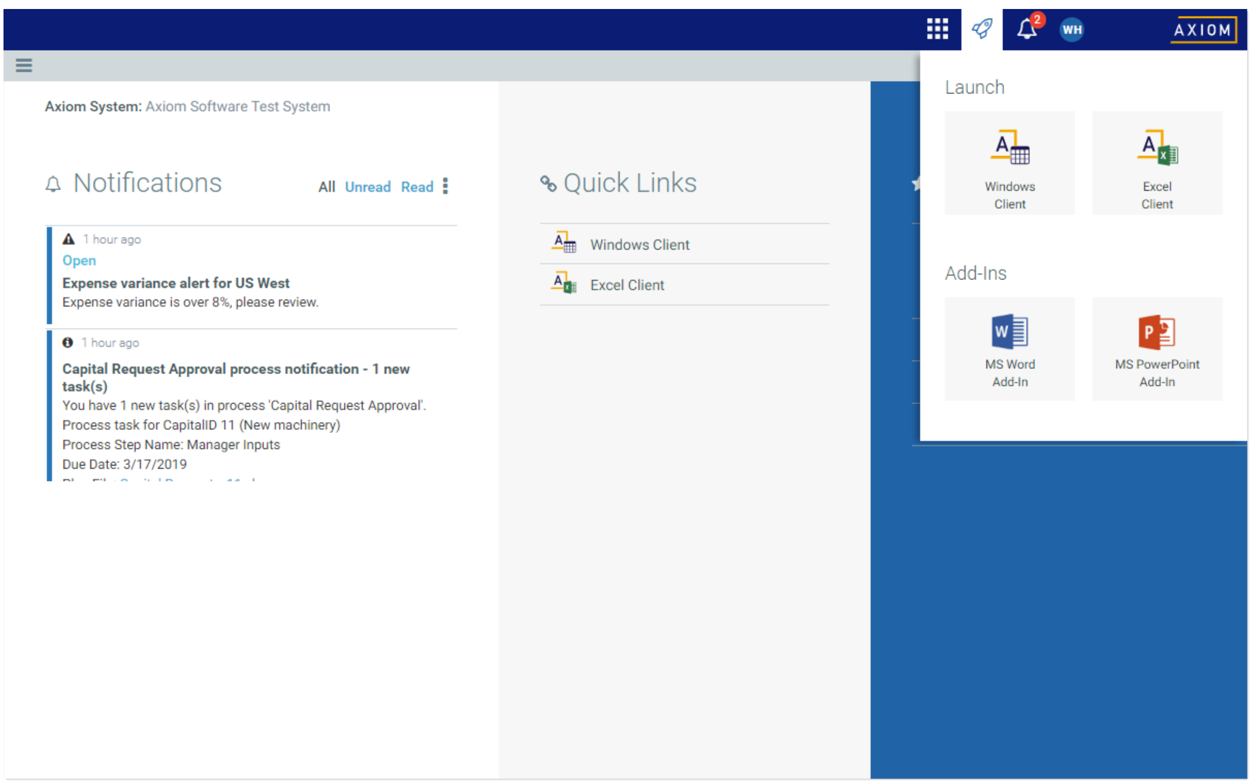
Launching Axiom Strategy Management applications

You can launch various Axiom Strategy Management 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 Strategy Management About box.

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

Launching add-ins

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

Item	Description
MS Word Add-In	Launches the Axiom Strategy Management Add-In for Microsoft Word.
MS PowerPoint Add-In	Launches the Axiom Strategy Management Add-In for Microsoft PowerPoint.

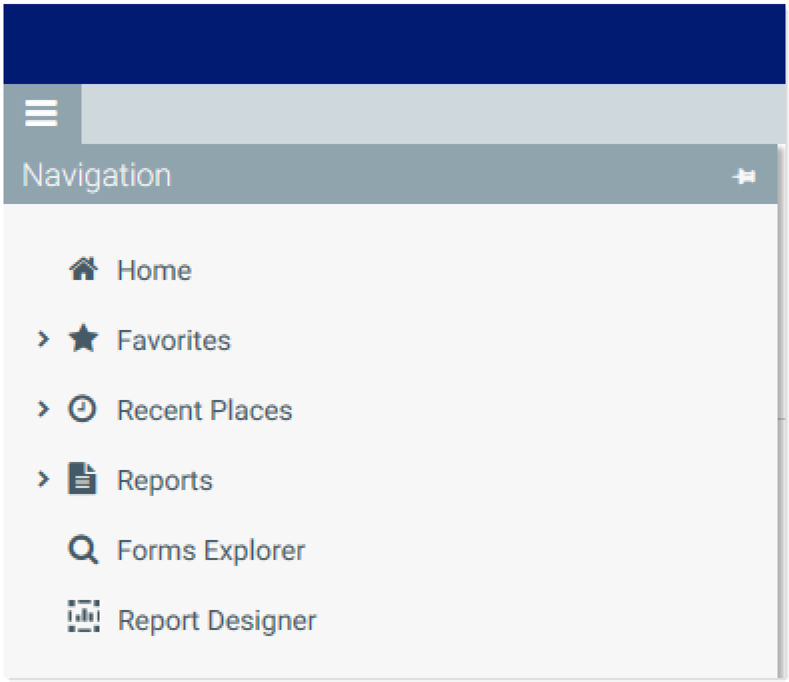
NOTE: One or both add-ins may not display in the menu, depending on your organization's preferences.

The Word and PowerPoint Add-ins are optional applications to support document integration between Axiom Strategy Management 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 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 Strategy Management 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 Designer. The standard navigation links can be customized, so each client's system may look different. Navigation links can only be customized by administrators using the Desktop Client.
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.
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

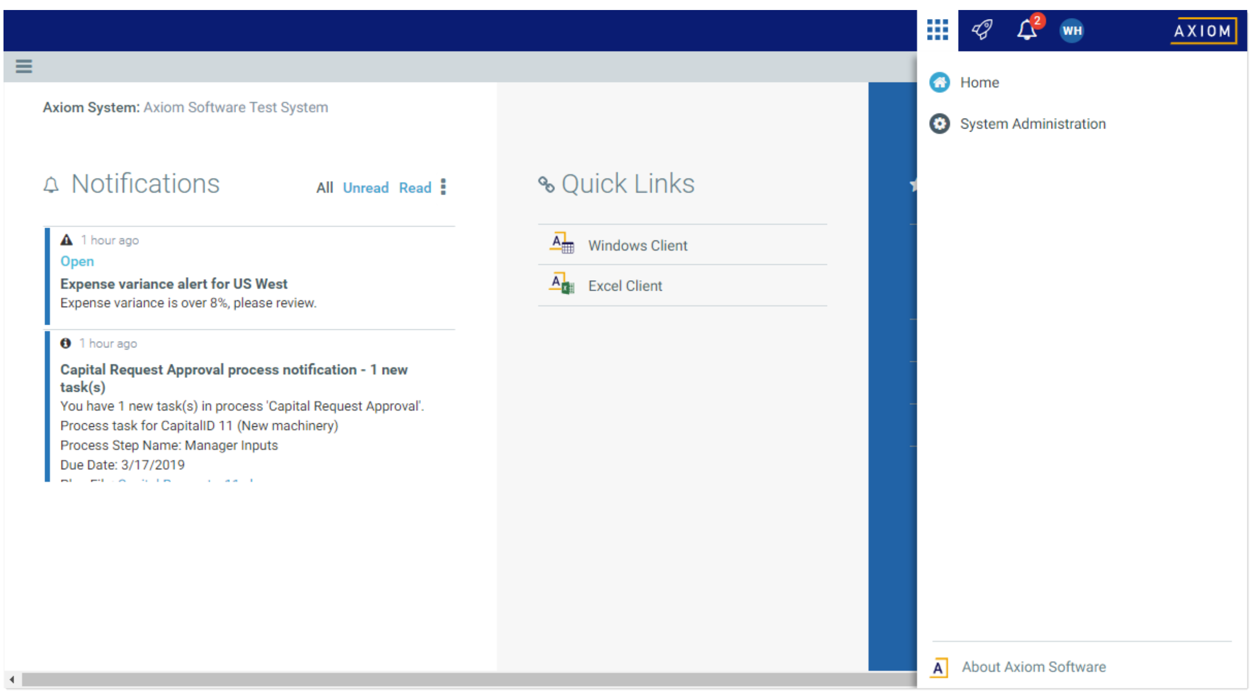
Use the Axiom Software About box to see information about your current system, such as:

- Axiom Strategy Management version number
- Product version numbers
- System name
- Application server URL

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

To open the About box:

1. Click the menu icon in the Global Navigation Bar.
2. At the bottom of the Area menu, click **About Axiom Software**.

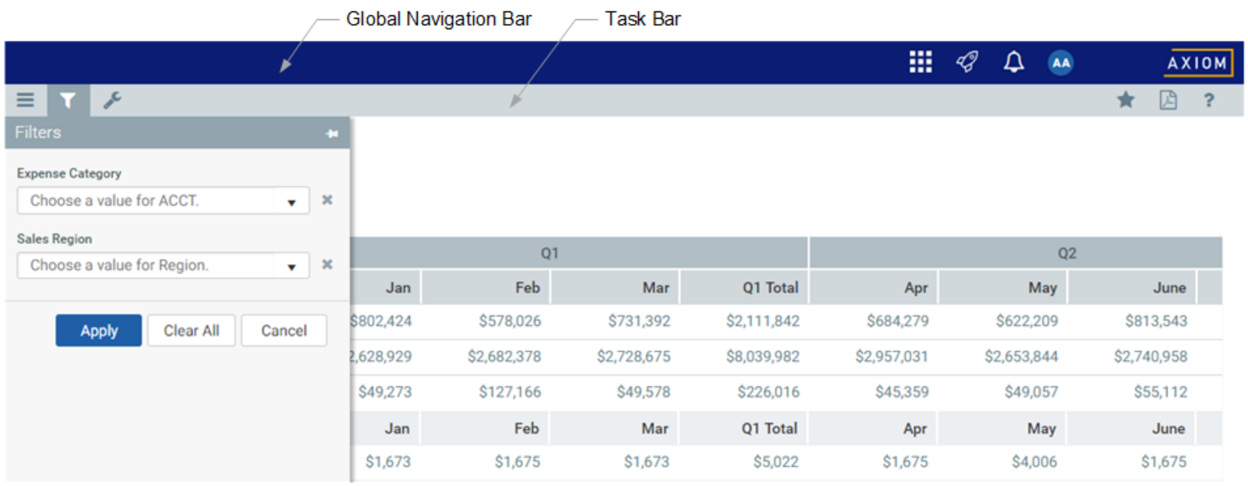


About Axiom Software at bottom of Area menu

Web Client overview

Most Web Client features and navigation can be accessed using the two bars across the top of each page:

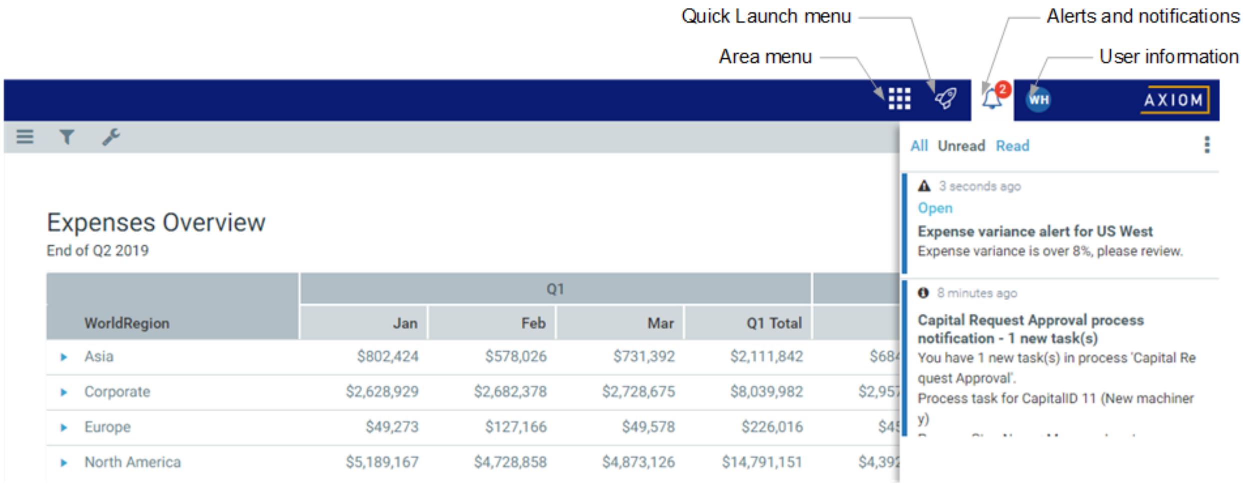
- **Global Navigation Bar**: The bar at the top of the page provides access to system-level areas and features.
- **Task Bar**: The gray bar underneath it provides access to various features that are specific to the current area, page, or document.



Global Navigation Bar

The Web Client Global Navigation Bar provides access to various system-level areas and features. Using this bar, you can:

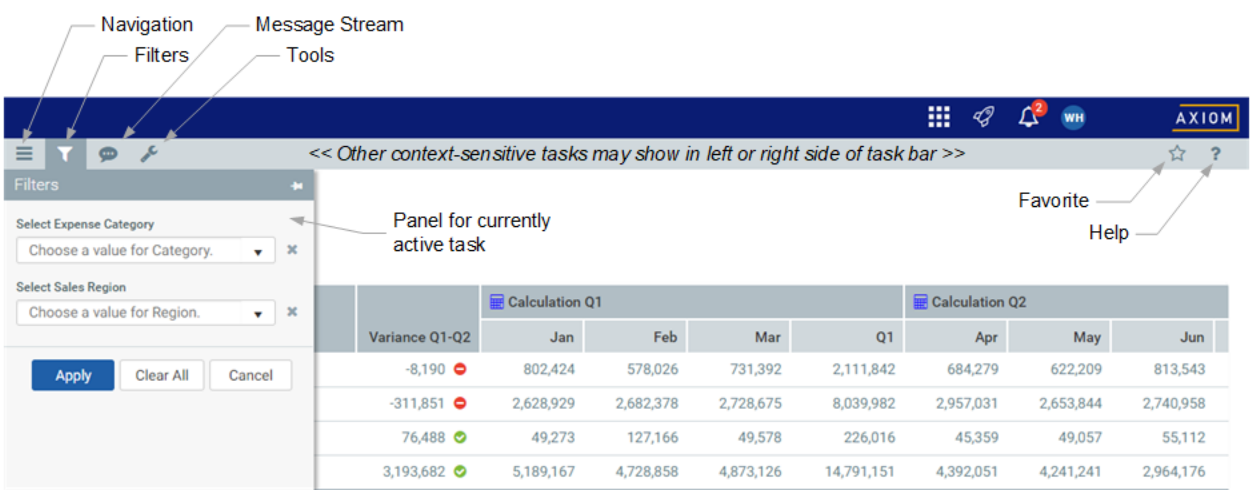
- Navigate to home, system administration, and various products (if applicable)
- Launch various client applications
- View alerts and notifications from various system processes and features
- View user information, configure session settings, and log out



Task Bar

The Web Client Task Bar provides access to various features that are specific to the current area, page, or document. Using this bar, you can:

- Navigate to your browser-based files and related areas of the Web Client
- Filter the data shown on the current page
- Comment on the current document and review comments from others
- Access tools relating to the current document or area
- Save the current page or document as a favorite
- View help for Axiom Strategy Management or for the current document
- Perform other context-sensitive tasks such as managing attachments or working with the Report Designer



The left-hand side of the task bar contains a task toolbar. You can click on any icon in this toolbar to open the panel for the associated feature. For example, clicking the filter icon opens the Filters panel. Clicking the icon again closes the panel.

The panel can be pinned or unpinned using the pin icon in the top right of the panel. If the panel is unpinned, the panel overlays the current page contents, and clicking on the page closes the panel. If the panel is pinned open, then the form is pushed to the side so that the panel contents and the form can be viewed at the same time. When pinned, clicking on the page does not close the panel—you must unpin the panel or click the toolbar icon again to close the panel.

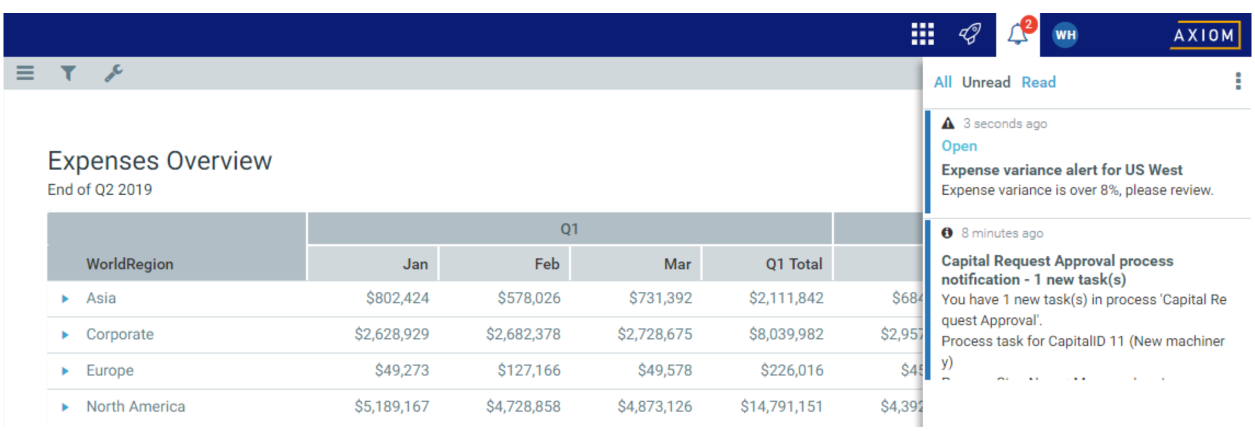
The contents of the task bar vary depending on the current page or document. For example, the Message Stream and the Filters panel are only available if they have been enabled for the current document. If a particular feature is not available for a particular document or area, then either it has not been enabled or it does not apply.

Viewing notifications in the Web Client

If you receive a notification in Axiom Strategy Management, you can view it in the Notifications panel. Notifications can come from the following sources:

- **Alert notifications.** Your system administrators and other power users may have set up alerts to monitor certain alertable conditions and then notify specified users.
- **Process management notifications.** These notifications result from active processes in process management, such as to inform you that you have a new task in the process.
- **Message stream notifications.** If you have subscribed to a document's message stream, you will be notified of any new comments made about that document.
- **Axiom system processes such as Process Plan Files.** If you have triggered certain system processes, Axiom Strategy Management will notify you when the process is completed or when errors occur.

To open the Notifications panel, click the Notifications icon in the Global Navigation Bar.



Example Notifications panel

If you have new, unread notifications when you first log in, or if you receive new notifications during a current session, a red number displays on the Notifications icon. Unread notifications are indicated by a blue bar along the left-hand side of the notification. Once a notification has been read, the bar is removed.

NOTES:

- Your notifications may also display on your home page. If so, the notifications can be read and managed using the same features described here.
- All notifications displayed in the Notifications panel are also available in the Notifications task pane of the Desktop Client. Both areas read from the same source of notifications, and edit the same source as well. If you mark a notification as read in one area, or delete a notification from one area, the other area will reflect these changes.

Reviewing notifications

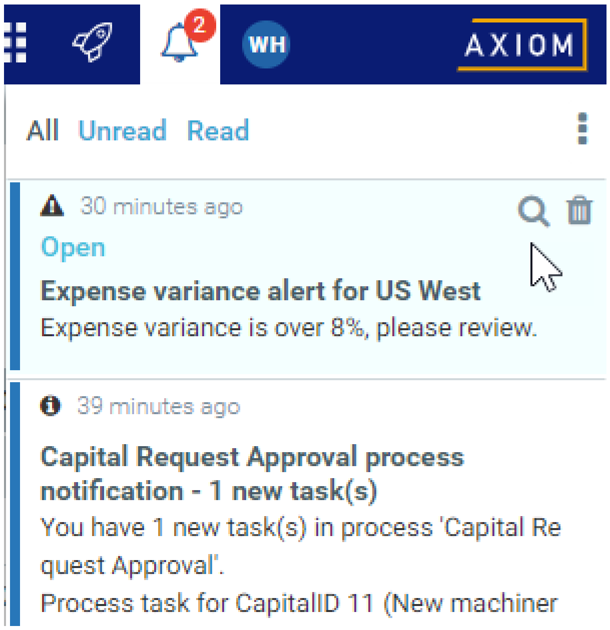
Within the panel, notifications are listed in the order they were received, with the newest notifications at the top. You can click the **All**, **Unread**, and **Read** links at the top of the panel to indicate which notifications you want to see in the panel. By default, the panel shows all notifications. When you click on a notification, it is automatically marked as read.

Notifications may display with the following icons:

	Notification about a comment posted to the Message Stream.
	Notification with "information" priority.
	Notification with "warning" priority.
!	Notification with "error" priority.

If the notification contains more content than can be displayed within the summary view, then you can view the full notification as follows:

- Hover your cursor over the notification to display the action icons at the top right.



- Click the magnifying glass icon to open the full notification in a dialog.

Additionally, some notifications contain links to documents that you can open for more information.

Notification actions

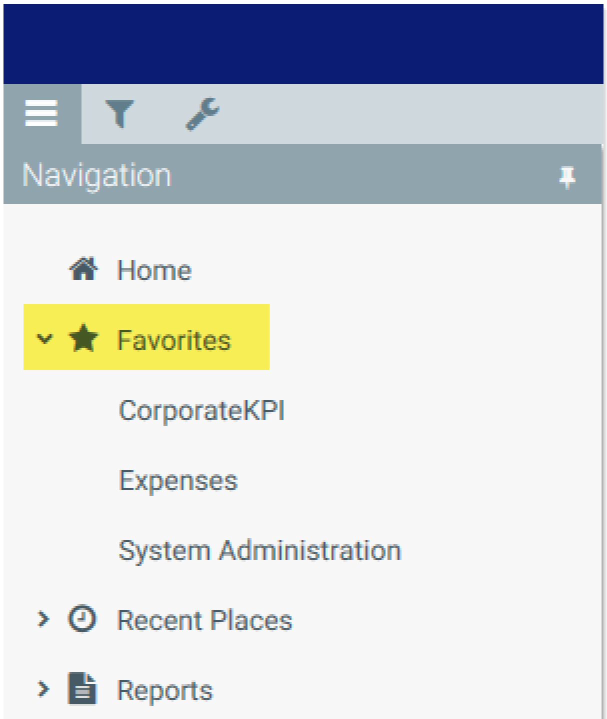
Hover your cursor over the menu icon in the top right of the Notifications panel to perform the following actions:

- **Select All**: Select all notifications that are currently showing in the panel.
- **Mark Read**: Mark the selected notifications as read.
- **Mark Unread**: Mark the selected notifications as unread.
- **Delete**: Delete the selected notifications. Keep in mind that once a notification has been deleted, you cannot undo this action. You can also delete a notification by hovering your cursor over the notification, then clicking the delete icon .

Managing favorites in the Web Client

You can save Axiom files and Web Client pages as favorites, for quick access to commonly used items. Your favorites list is available in the following locations:

- The Navigation panel
- The default Web Client home page



Example favorites in Navigation panel

Your favorites list displays any favorites that you have saved in the Web Client. It also displays web-enabled favorites that you have saved in the Desktop Client (meaning favorites to individual Axiom forms or web reports). Other favorites saved in the Desktop Client do not display in the Web Client (including folders saved as favorites, even if the folder contains web-enabled files).

Saving favorites

To save the current document or page as a favorite in the Web Client, click the star icon in the right side of the Task Bar. The star icon toggles from outline (not a favorite) to filled (a favorite).

Favorite icon in Web Client task bar

Once a favorite has been saved, it displays in your favorites list in the Web Client and in the Desktop Client. You can use the saved favorite to quickly open the document or page.

Web favorites are saved using the name shown in the browser tab. Web reports and Axiom forms support the ability to define a title that displays in the browser tab, which means the title may be different than the file name. If the title is changed after the favorite is saved, the favorite does not update to show the changed title (however, the favorite still works to open the specified document).

Currently, the Web Client does not support the ability to rename or reorder web favorites, or to organize web favorites into folders. Web favorites display as a flat list, in alphabetical order. However, if you rename a favorite in the Desktop Client, the Web Client updates for the new name.

NOTES:

- When favorites are saved in the Web Client, they are saved as URLs instead of as document shortcuts. This allows you to save any page in the Web Client as a favorite, not just documents. For example, if you have access to the Audit Manager, you can save that as a favorite for quick access to the page. However, if the name of your Axiom Strategy Management virtual directory ever changes (which should be a rare occurrence), the web favorite will no longer work.
- If a web favorite points to a document, and that document is later moved or renamed, the favorite will continue to open that document (but the favorite name is not updated).
- If you organize web favorites into a folder using the Desktop Client, the folder will display in the favorites list in the Web Client Navigation panel. However, the favorites list is flattened for display in the Web Client home page.

Deleting favorites

To delete a favorite, hover your cursor over the favorite name (in either the Navigation panel or your home page), then click the delete icon. The favorite is deleted in the Web Client and in the Desktop Client.

If the document or page for an existing favorite is deleted, the favorite is not automatically deleted. If you try to use the favorite, you are informed that the document or page cannot be found. In this case you must manually delete the favorite.

Viewing page content

All Axiom Strategy Management users have access to all main pages except the Admin pages, which are available only to Strategy Management administrators. What you can see on each page depends on your access rights, which are determined by your user roles and whether you are designated as an owner or sponsor for any Initiatives. For example:

- All users can see Objective names, but only users with the Strategy Management Admin role, or the Strategy Management Executive role can view all Objective information and Objective measure data. Objective owners can also view information and measure data for Objectives that they own.
- If you are designated as the owner or sponsor of an Initiative, you can see information related to that Initiative, but not other Initiatives.
- If you have the Initiative Approver or Initiative Creator user role, you can view all Initiative information.

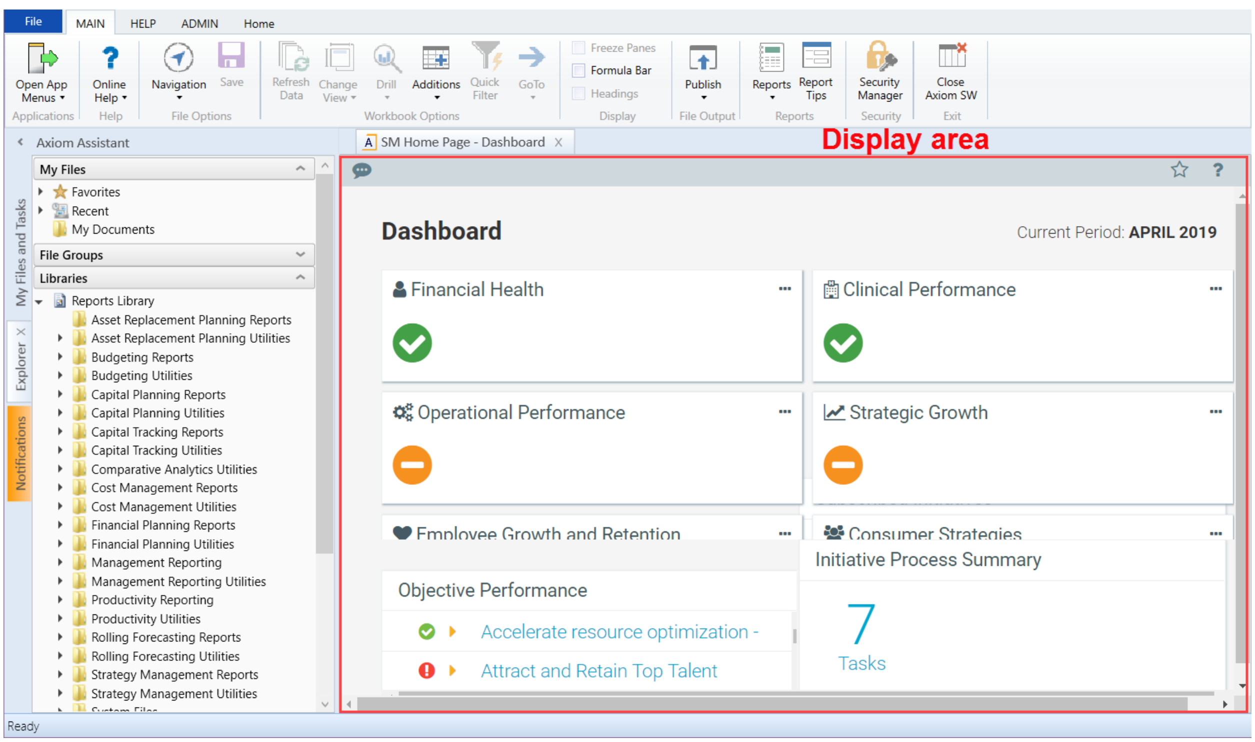
Using the Desktop Client

Although most of the features in Axiom Strategy Management are available from the Web Client, if you are a system administrator or are using certain reports, you may need to use the Desktop Client occasionally; for example, when assigning security roles to users.

All Axiom Software products, including Axiom Strategy Management, share a common interface and use many of the same features. The interface includes the following common sections.

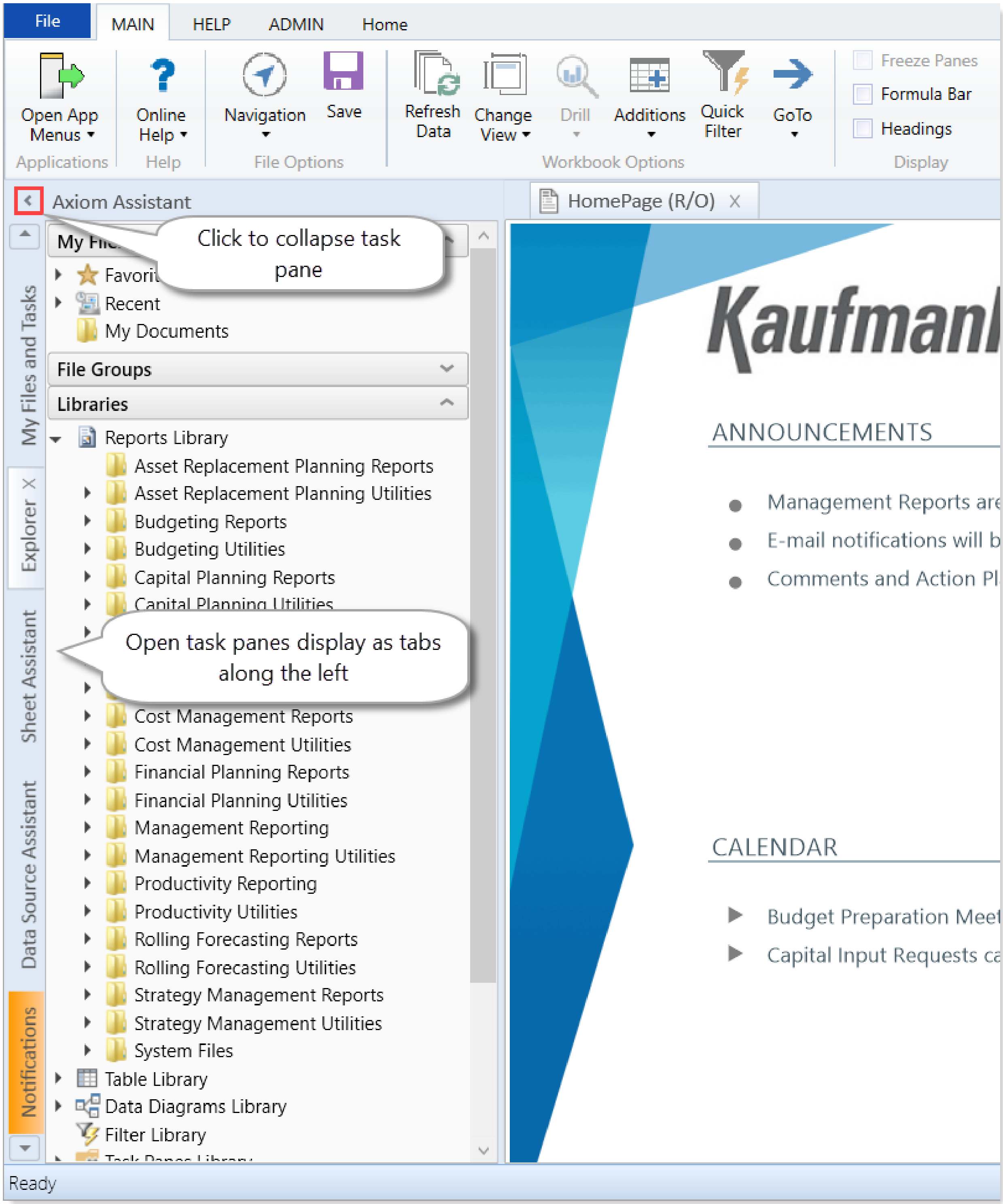
Display area

The main area of the Desktop Client displays open files. By default, it shows the Axiom Strategy Management Dashboard. The display here is essentially identical with the one in the Web Client; the only pieces missing are the side navigation panel, replaced by the Axiom Assistant pane; and the Web Client toolbars. If you click any links in the Dashboard, they behave the same as in the Web Client—they either open a window or open the corresponding Axiom Strategy Management Web Client page. To work within the Desktop Client, use the task panes.



Task panes

A task pane provides access to commands, utilities, reports, plan files, and so on for Axiom Strategy Management, 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.


File
MAIN
HELP
ADMIN
Home
Open App Menus
Online Help
Navigation
Save
Refresh Data
Change View
Drill
Additions
Quick Filter
GoTo
Freeze Panes
Formula Bar
Headings
Applications
Help
File Options
Workbook Options
Display
Axiom Assistant
HomePage (R/O)
Click to collapse task pane
Open task panes display as tabs along the left
My Files and Tasks
Explorer
Sheet Assistant
Data Source Assistant
Notifications
Favorites
Recent
My Documents
File Groups
Libraries
Reports Library
Asset Replacement Planning Reports
Asset Replacement Planning Utilities
Budgeting Reports
Budgeting Utilities
Capital Planning Reports
Cost Management Reports
Cost Management Utilities
Financial Planning Reports
Financial Planning Utilities
Management Reporting
Management Reporting Utilities
Productivity Reporting
Productivity Utilities
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Strategy Management Reports
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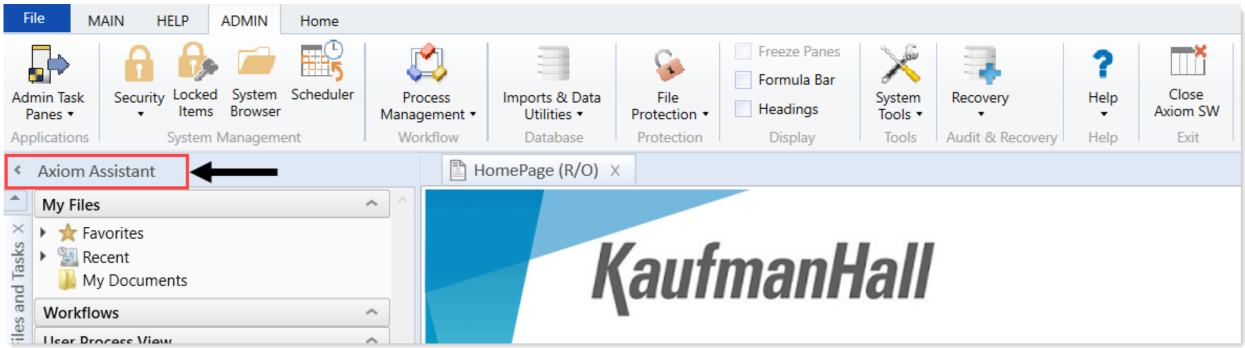
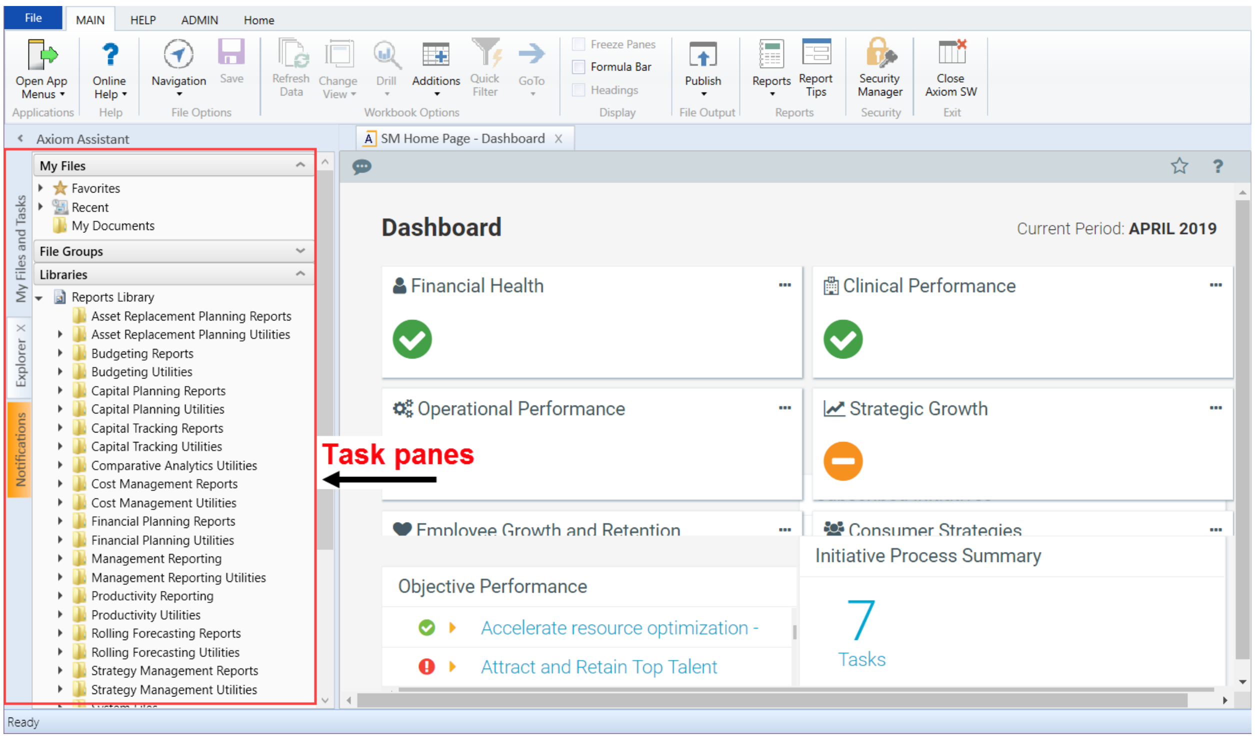
Data Diagrams Library
Filter Library
ANNOUNCEMENTS
CALENDAR
Ready





Ribbon tabs

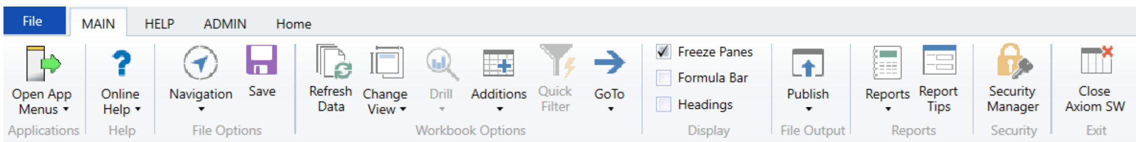
Ribbon tabs provide access to commonly used features and shortcuts to frequently accessed files. They display above the task pane and main display areas. The role assigned to you determines the ribbon tabs that display. For example, the Admin ribbon tab only displays to those users assigned the Administrator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

NOTE: 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

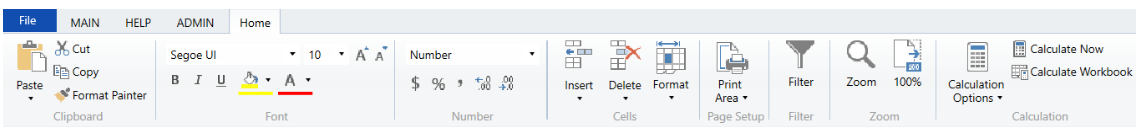
Includes commands for accomplishing most tasks in Axiom:

- Opening, closing, and saving files
- Viewing data in spreadsheets (if you have access rights to do so)
- Printing or emailing files
- Accessing shortcuts to frequently accessed reports



Home

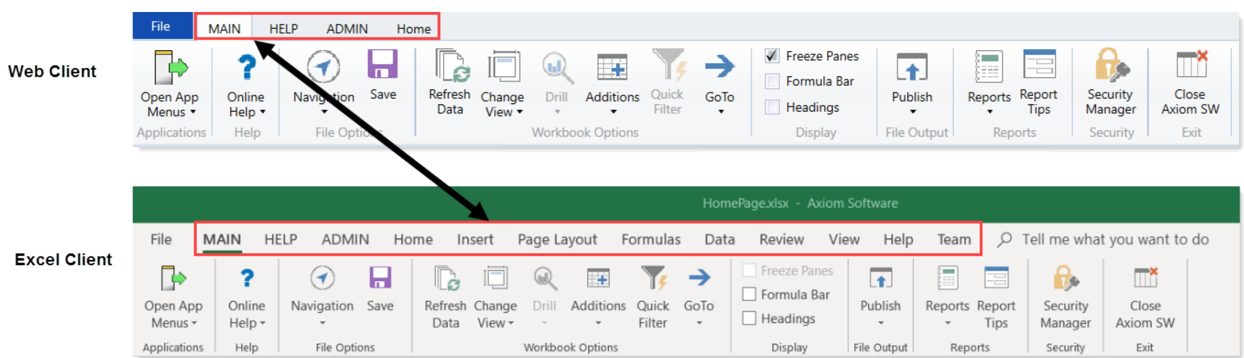
Includes standard spreadsheet commands.



Some options on the ribbon tabs display grayed out unless certain types of files such as reports or plan files are currently open, or if you do not have the necessary security permissions to use the feature.

The Excel Client displays all of the same ribbon tabs included in a normal Excel file. The Windows Client only includes a subset of the same ribbon tabs located in the Home ribbon tab.

> **TIP:** When creating reports, we recommend that you use the Excel Client.



Windows Client or Excel Client?

The following table describes each client:

NOTE: All Axiom Strategy Management web pages are configured for viewing in the Web Client. You can view the Dashboard in the Windows and Excel clients, but if you click a link to another page from a Dashboard link, you cannot navigate back.

Type	Description

Windows Client	• Emulates a spreadsheet environment without requiring Excel.
	  ◦ Provides access to some Axiom Strategy Management features.
	  ◦ Navigation and help functions differ from the Excel Client.
	• Communicates with the database using http or https.
	• Administrative rights not required for local installation or updates.
	• Users with appropriate permissions can open standard Excel files from within the Windows Client.
	• Provides faster processing speeds and fewer technical requirements than the Excel Client.
	• Access to features in this client depend on user access permissions

Excel Client	• Provides access to all of the Axiom Software features within a Microsoft Excel interface. • Communicates with the database using http or https. • Administrative rights are not required for local installation or updates. • Users with appropriate permissions can open and create any normal Excel file and perform Excel tasks without needing to exit the Excel Client.

NOTE: The instructions in this website, including the screenshot examples, assume that your organization is using the Windows Client. The Excel Client uses the same features, but with the added benefit of the Excel interface, including the Excel ribbon tab.

Opening the Explorer task pane

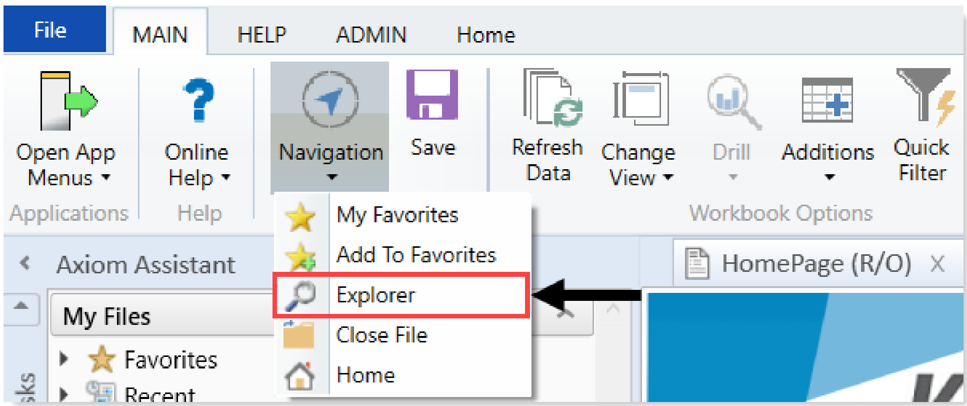
Axiom Strategy Management provides a built-in Explorer task pane so that you can quickly access your favorites, recent items, and all the files that you have rights to access.

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**.



Accessing Axiom Strategy Management features

In Axiom Strategy Management, admins and non-admin users access main features and functionality in the Desktop Client from the Explorer task pane. However, your user role(s) determines which features you can access. You may not have access to all the features listed here.

To access Axiom Strategy Management File groups:

1. In the **Explorer** task pane, expand the **File Groups** section.
2. Scroll down to and expand **Strategy Management - Requests**.

To access Axiom Strategy Management Reports:

1. In the **Explorer** task pane, expand the **Libraries** section.
2. Expand the **Reports Library**.
3. Scroll down to and expand **Strategy Management Reports**.

To access Axiom Strategy Management utilities:

1. In the **Explorer** task pane, expand the **Libraries** section.
2. Expand the **Reports Library**.
3. Scroll down to and expand **Strategy Management Utilities**.
4. Expand **Utilities**.

> **NOTE:** You can also access Axiom Strategy Management Home pages by expanding **Home Pages**.

To access Axiom Strategy Management Scheduler Jobs:

1. In the **Explorer** task pane, expand the **Libraries** section.
2. Expand the **Scheduler Jobs Library**.
3. Expand **Strategy Management**.

> **NOTE:** System administrators can access the following Scheduler jobs: SM_CreatePlanFiles, UpdateMeasureData-SQL, and UpdateMeasureTarget-SQL

To access Axiom Strategy Management strategy hierarchy tables:

> **NOTE:** Only administrators can access the Initiative and Objective tables.

1. In the **Explorer** task pane, expand the **Libraries** section.
2. Expand the **Table Library**.

3. Expand **!Dimensions** and then do any of the following:
   - To access the Initiative table, scroll down to and double-click **Initiative**.
   - To access the Measure table, scroll down to and double-click **Measure**.
   - To access the Objective table, scroll down to and double-click **Objective**.
   - To access the Perspective table, scroll down to and double-click **Perspective**.

To access Axiom Strategy Management Data tables:

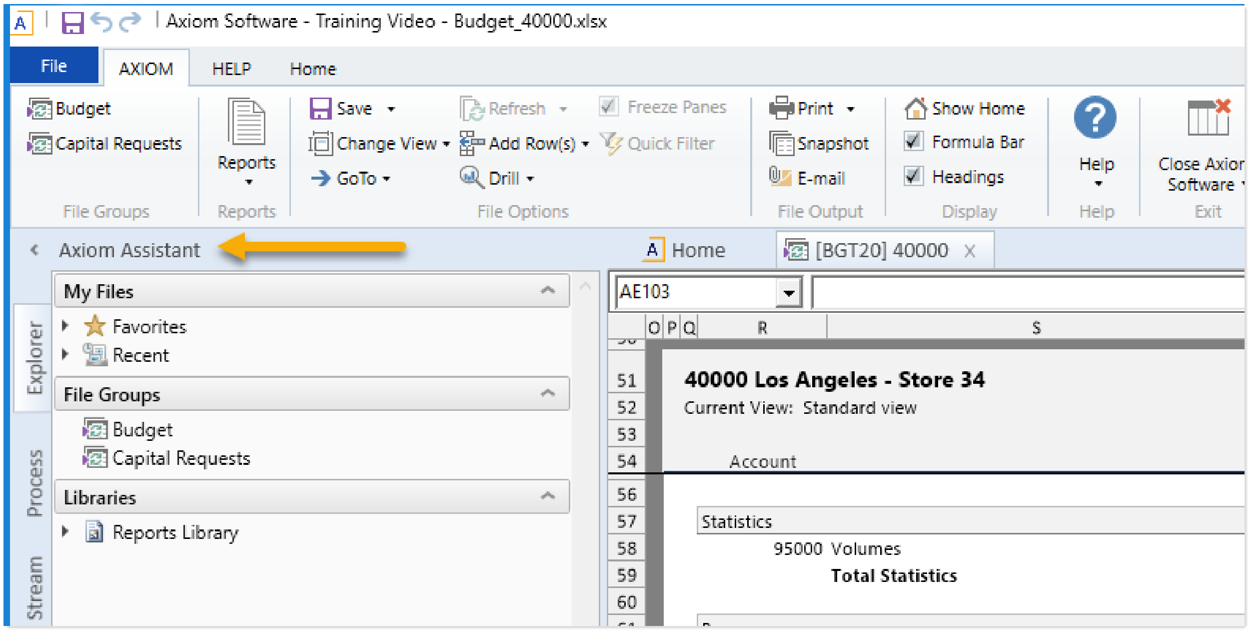
NOTE: Only administrators can access the Data tables.

1. In the **Explorer** task pane, expand the **Libraries** section.
2. Expand the **Table Library**.
3. Expand **Strategy Management**.
4. Expand **Data**.
5. To open the desired table, double-click it.

Axiom Assistant task panes

The Axiom Assistant area provides quick and easy access to Axiom Strategy Management files and features as you work in the Desktop Client. A variety of task panes are available to help you perform general and context-sensitive tasks. Additionally, system administrators can create customized task panes for use in this area.

The Axiom Assistant area is located in the left-hand side of the application, below the ribbon and to the left of any opened files. By default, the area is expanded, and you can work with any of its available task panes by clicking the side-tabs along the left-hand edge of the pane.



Example Axiom Assistant area

Available task panes

The task panes available to you in the Axiom Assistant area depend on your system configuration and your security permissions. The following task panes may be available:

Task pane	Description	Availability
Data Source Assistant	Helper tool to build data sources, such as RefreshVariables, DataLookup, and Grid.	This task pane is system-controlled and displays if you have the appropriate security permissions, and the file is an Axiom file.
Explorer	Open files and other items that you have access to, including favorites.	This task pane is included by default, but may be disabled in your system or restricted to only certain users.
File Processing	Configure and perform file processing for an Axiom file, such as to perform multipass processing, file collect, or batch processing.	This task pane is system-controlled and displays if you have the appropriate security permissions and the file is enabled for File Processing.
Form Assistant	Configure form settings for an Axiom file, and preview the form.	This task pane is system-controlled and displays if you have the appropriate security permissions and the file is enabled for Axiom forms.

Task pane	Description	Availability
Messages	View comments about the current document, and add comments.	This task pane is system-controlled and displays for all eligible documents.
Notifications	View alert and system notifications and open associated files.	This task pane is system-controlled and displays if you have any active notifications.
Process	View process information and complete process tasks. By default this task pane only displays if it is relevant to you (for example if you are the assigned owner of a process task).	This task pane is included by default, but may be disabled in your system.
Sheet Assistant	Configure workbook and worksheet settings for an Axiom file, including Axiom queries.	This task pane is system-controlled and displays if you have the appropriate security permissions and the file is an Axiom file.
Table	View table details, set a filter, and refresh the currently opened table.	This task pane is system-controlled and displays when using Open Table in Spreadsheet.
<Custom Task Panes>	Your organization may have defined one or more custom task panes for your system.	Custom task panes may open automatically when Axiom Strategy Management is launched, or you may have access to the Task Panes Library to open certain task panes as needed.

The order of task panes in the Axiom Assistant area cannot be manually changed. Your system administrator has specified an order for the task panes that open when the system is started. System-controlled task panes display after these startup task panes.

Minimize Axiom Assistant

By default, the Axiom Assistant area is maximized when you first start Axiom Strategy Management. If desired, you can minimize this area—for example, to gain more screen space while working on a file. When minimized, the area displays as a thin strip along the left-hand side of the application, with one or more side-tabs for each task pane.

You can expand the Axiom Assistant area to perform a task, and then minimize it again when you are finished.

- To minimize the Axiom Assistant pane, click the button in the header.
- To expand the Axiom Assistant pane, click the button in the collapsed header, or click on one of the task pane tabs.

Axiom Strategy Management remembers the state of the Axiom Assistant (minimized or expanded) when you exit the application, and will apply that state the next time you open Axiom Strategy Management on the same machine.

It is not possible to completely hide the Axiom Assistant area when task panes are open, however, if no task panes are open then the Axiom Assistant area is automatically hidden (and will automatically show again when a task pane is opened).

Opening task panes

In most cases, the task panes that you need to use will open automatically—you do not need to manually open them.

- Certain task panes are configured to open automatically when Axiom Strategy Management is started, such as the Explorer task pane. These task panes are considered to be "global" task panes that you may want to use at any time while you work in the system.
- Other context-sensitive task panes only open when using certain features. For example, the File Processing task pane only displays when you open a file that is enabled for File Processing. There is no need to manually open the task pane because it will always be available when it is relevant (and assuming that you have security permissions to view it).

If you have access to the Task Panes Library to open certain custom task panes as needed, then you can open a task pane by double-clicking it in the Explorer task pane or the Axiom Explorer dialog. Alternatively, one of your "startup" task panes might be used to open other task panes.

For example, you might have access to a Monthly Reporting task pane that details the steps you need to do to run your monthly reports, and links to those reports. You wouldn't necessarily need this task pane to be open at all times; instead, you would only want to see it when you are ready to process your monthly reports. You could open the task pane as needed from the Task Panes Library or from another custom task pane that links to it.

Closing task panes

Most task panes cannot be manually closed. Either they are global task panes that always apply, or they are context-sensitive task panes that close automatically when the associated file or feature is closed. Alternatively, you can minimize the Axiom Assistant area to "hide" all task panes and gain more screen space for your open files.

If a task pane is closeable, then you can close it by clicking the **X** icon on the side-tab for the task pane. If this icon is not present, then the task pane cannot be closed. Typically, only task panes that you open manually can be closed manually, but in some cases you may also be able to close task panes that open on startup.

Using task panes in the Axiom Excel Client

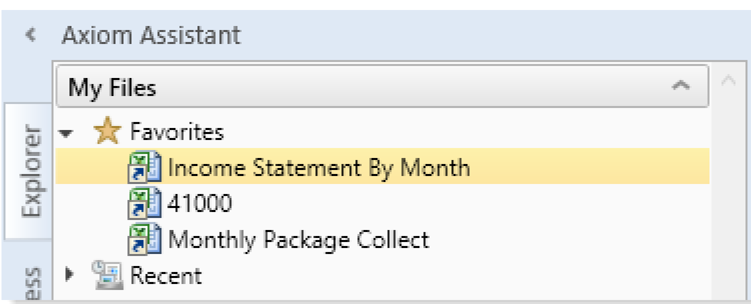
When using the Axiom Excel Client, each file opens within its own window, and each window maintains its own set of ribbon tabs and task panes. This means that as you switch windows, the set of task panes available in each window may be different. For example:

- If you manually opened a task pane in one window, that task pane will only be present in that window. It will not be present in other windows.
- The currently active task pane is managed independently for each window, so the active task pane may change as you change windows. (This can also occur when using the Axiom Windows Client, if you switch between files that have different default task pane associations. However, in the Axiom Excel Client it may also happen when switching between files with the same default task pane associations.)
- The current state of task panes is managed independently for each window. For example, if you expand the Reports Library in the Explorer task pane in one window, that expansion will not be present if you switch to a different window.

Managing favorites

You can save Axiom files and other items as favorites, for quick access to commonly used items. In the Desktop Client, your favorites list is available in the following locations:

- The Explorer task pane in the Axiom Assistant area
- The Axiom Explorer dialog (if you have permission to access this dialog)



When an item is saved to favorites, you can open the item by double-clicking it, or you can right-click it to access any other commands that would be available on the item in its native area. For example, if you have rights to the Table Library and you save a table as a favorite, you can right-click the table favorite and perform actions such as editing the table structure.

If an item that a favorite points to is deleted, then the favorite becomes invalid and a red arrow icon displays next to it. If you attempt to open an invalid favorite, a message box informs you that the item has been deleted, and asks whether you want to delete the favorite. If a file is moved or renamed within the Axiom Software file system, but it retains the same document ID, then the shortcut will not be broken.

Saving and deleting favorites

You can save an item as a favorite in one of the following ways:

- In the **Explorer** task pane and the **Axiom Explorer** dialog, you can right-click an item and select **Add to Favorites**.
- When a file is open, you can right-click the file tab and select **Add to Favorites**.

The item is saved as a favorite and now displays in your Favorites list. If the file was open when you saved it as a favorite, it displays using the file tab name. If needed, you can change the display name by editing the shortcut properties for the favorite.

TIP: If you open a table using **Open Table in Spreadsheet**, and then save the open table as a favorite (using the file tabs), the settings you used will be automatically saved as part of the favorite, in the shortcut properties. You may want to rename the favorite to indicate the particular settings (for example: GL2020 - Filtered for North Region).

NOTE: If a web-enabled file is saved as a favorite in the Desktop Client, that favorite will also display in the Web Client. This includes Axiom forms and web reports. All other types of favorites do not display in the Web Client.

To delete a favorite, right-click the item and then select **Delete**.

Organizing favorites

You can create sub-folders in the Favorites area to organize favorites by folder. To create a new folder, right-click **Favorites** and select **New Folder**.

By default, favorites are displayed in the order that they were added (new favorites are added to the bottom of the list). You can drag and drop individual favorites to change the order. Sub-folders cannot be reordered—they will always display in alphabetical order.

To rename a favorite, right-click the item and then select **Rename**. The name becomes editable, and you can type a new name.

Shortcut properties

You can edit the shortcut properties for a favorite. Right-click the favorite and select **Shortcut Properties**. In this dialog, you can edit the shortcut name, change the shortcut target, and define certain shortcut properties.

The available shortcut properties vary by file type. For example, you can configure a report favorite to always open as read-only, or to automatically apply a Quick Filter when opening.

Using web favorites in the Desktop Client

If you save a favorite in the Web Client, that favorite also displays in the Desktop Client favorites list. You can double-click the web favorite to open it in the Web Client browser.

When a favorite is saved in the Web Client, it is stored as a URL instead of a document shortcut. If the target of the favorite is later deleted, the favorite does not show as invalid in the Desktop Client. If you try to use the favorite, you are informed that the document or page cannot be found. In this case you must manually delete the favorite.

Opening recent files

Axiom Strategy Management maintains a list of your recently opened files in the Desktop Client. You can use this list for quick access to recent files.

The recent file list is located in the **My Files** section of the Explorer task pane and Axiom Explorer. You can double-click files to open them, or right-click to access the context menu for the file type. Recent files are listed using the file tab name that they were opened with, which may or may not be the same as the file name.

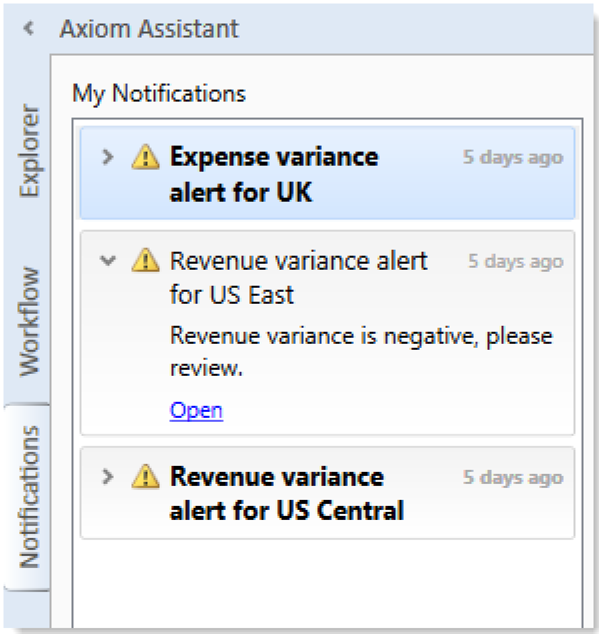
The list displays the last 15 files that you recently opened. Note the following:

- If you want to clear the list, right-click **Recent** and select **Clear History**.
- If you want to continue to have quick access to a recent file, you can add it to your favorites. Right-click the file and select **Add to favorites**.
- If the icon next to a file name is a red arrow, this means that the file has been moved or deleted since you accessed it, so it can no longer be opened from the recent file list.

In the Axiom Windows Client only, recent files can also be accessed from the **File** menu. In the Axiom Excel Client, although your recent files are tracked in **File > Recent**, those links point to the temporary versions of the file stored on your local drive, not the source versions of the files stored in the Axiom Strategy Management database. Therefore, Excel's recent file list cannot be used to open Axiom files.

Viewing notifications using the Notifications task pane

If you receive an Axiom Strategy Management notification, the notification displays in the Notifications task pane. This is a system-controlled task pane that is always available in the Desktop Client if you have notifications. Click the **Notifications** tab in the Axiom Assistant area to view the task pane.



Example Notifications task pane

If you have unread notifications when you first log in, or if you receive new notifications during a current session, the Notifications tab will flash orange and remain that color until you click on the tab. Unread notifications display in bold text. Once a notification has been read, the bolding is removed.

Notifications can come from the following sources:

- **Alert notifications.** Your system administrators and other power users may have set up alerts to monitor certain alertable conditions and then notify specified users.
- **Process management notifications.** These notifications result from active processes in process management, such as to inform you that you have a new task in the process.
- **Message stream notifications.** If you have subscribed to a document's message stream, you will be notified of any new comments made about that document.
- **Axiom system processes such as Process Plan Files.** If you have triggered certain system processes, Axiom Strategy Management will notify you when the process is completed or when errors occur.

NOTES:

- The Notifications task pane is a system-controlled task pane; you cannot hide or show this task pane manually. The Notifications task pane always displays on startup if you have any active notifications (read or unread). Otherwise, it does not display. If you receive a new notification during a session and the task pane is not already open, this will cause the task pane to open.
- All notifications displayed in the Notifications task pane are also available in the Notifications panel of the Axiom Web Client. Both areas read from the same source of notifications, and edit the same source as well. So if you mark a notification as read in one area, or delete a notification from one area, the other area will reflect these changes.

Reviewing notifications

Within the task pane, notifications are listed in the order they were created, with the newest notifications at the top. Each notification displays a severity icon and an alert title, as well as how old the notification is. The following severity icons are used:

- Info
- Warning
- Error

To read the notification text, double-click the notification to expand it. The text should provide you with more information about the notification and why you are receiving it. You can double-click the notification again to collapse it.

If the notification is from an alert, then the alert creator may have specified a document that you can open to see more information about the alert condition. If so, then you will see an **Open** link underneath the message text when you expand the notification. Click this link to open the associated document.

Notification actions

You can select one or more notifications and then right-click to perform the following additional actions:

- **Mark Read**: Mark the selected notifications as read.
- **Mark Unread**: Mark the selected notifications as unread.
- **GoTo Alert Definition**: Open the source document for the alert, if you have permission to access the file. You will be taken directly to the specific alert definition that generated the notification.
- **Delete**: Delete the selected notifications. Keep in mind that once a notification has been deleted, you cannot undo this action.

Commenting on documents using the Message Stream task pane

When viewing a spreadsheet Axiom file within the Desktop Client, you can view comments that other users have made about the document and also make comments about the document. New comments are stored in the message stream for that document, so that all other users who access the document can see the comment. Additionally, you can "tag" other users in the comment, so that the tagged users are notified about the comment.

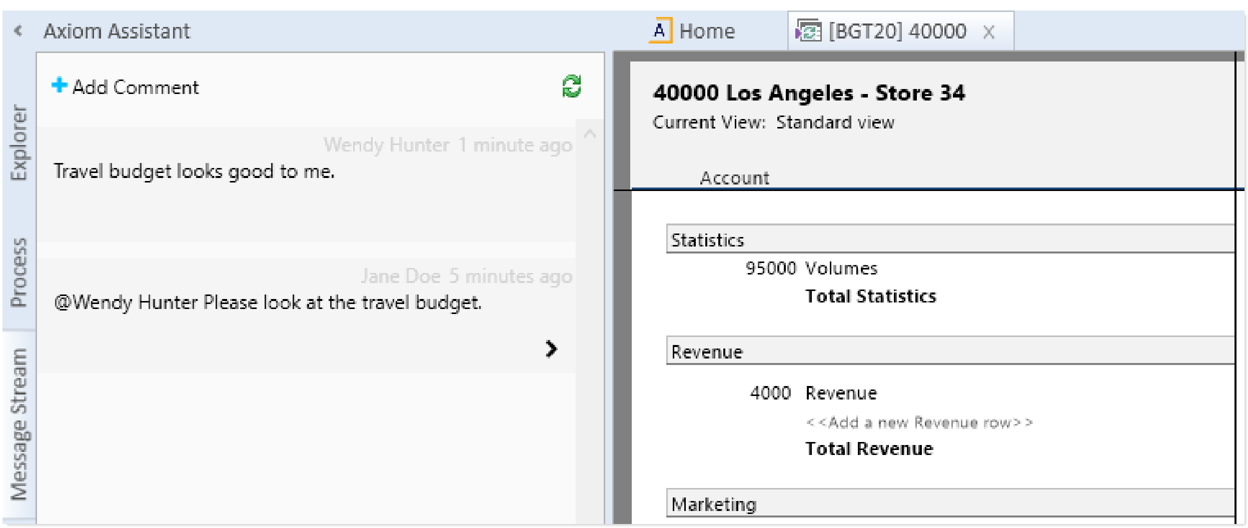
You can view comments and add comments using the Message Stream task pane. This is a system-controlled task pane that automatically opens for eligible documents.

NOTES:

- The message stream is only available for documents where it has been enabled.
- The message stream is also available for Axiom forms that are open within the Desktop Client, using the **Message Stream** panel. This panel is accessible from the task bar displayed across the top of the form.

Viewing the message stream

To view the message stream for the current document, click the **Message Stream** tab to display the task pane in the Axiom Assistant sidebar. This task pane shows all comments that have been made about the document.



Example message stream

Comments are displayed in the order they were made, with the most recent comment shown at the top of the panel. Each comment shows when the comment was made and the user who made it.

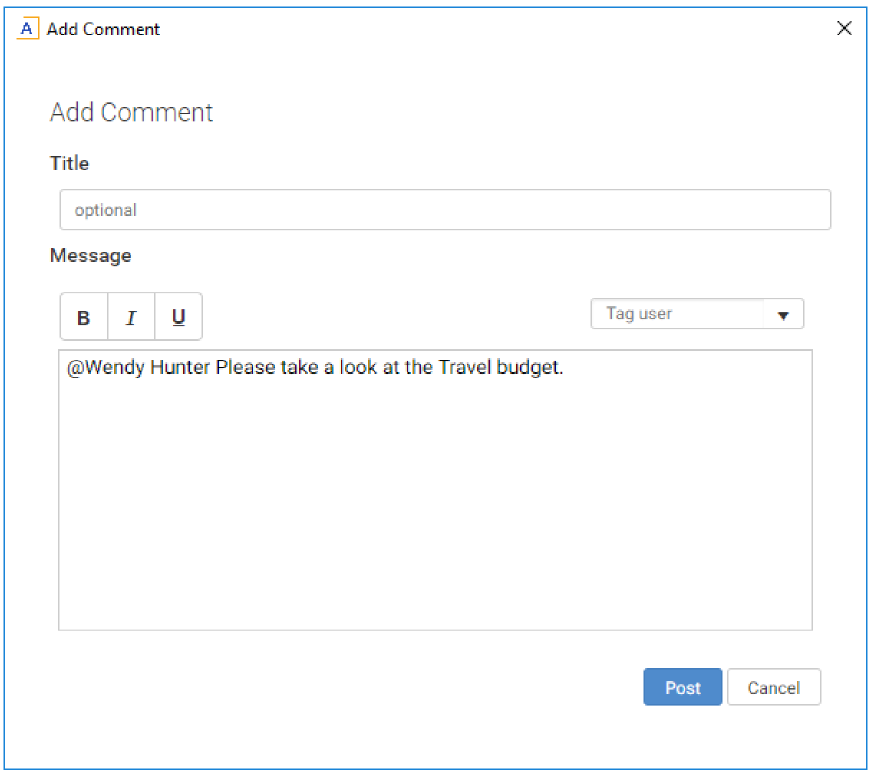
To view the full text and details of a comment, hover your cursor over the comment so that the > symbol displays on the right-hand side of the comment. Click the symbol to open a separate **Comment Details** dialog with the full comment text.

Once the message stream has been loaded for the current document, it is only updated automatically after you add a new comment. If necessary, you can manually refresh the task pane to see if any other users have made comments during the current file session.

Comments are stored for the life of the document, and cannot be deleted.

Adding a comment

To add a comment, click **Add Comment** at the top of the Message Stream task pane. In the **Add Comment** dialog, you can define an optional title for the comment, and then define the comment text. Basic text formatting of bold, italic, and underline can be used.



If desired, you can "tag" one or more users in the comment, so that those users are notified about the comment. Any user tagged in the comment will receive an email that contains the content of the comment and a link to the document. To tag a user, use the **Tag user** box to find a user and insert the tag. You can type into the box to find a specific user, or select a user from the drop-down list. When you click on a user name in the list, a tag will be inserted at the current cursor point in the comment text. The tag displays as `@FirstName LastName`.

When you click **Post**, the comment is saved to the message stream, and any tagged users will be notified.

NOTES:

- All users with access to the document can see comments posted to the message stream. Any comments made should be appropriate for the entire document audience. Do not post any sensitive information to the message stream.
- Adding a comment automatically subscribes you to the document's message stream, and tagging a user automatically subscribes that user to the document's message stream.

Ongoing notifications (subscriptions)

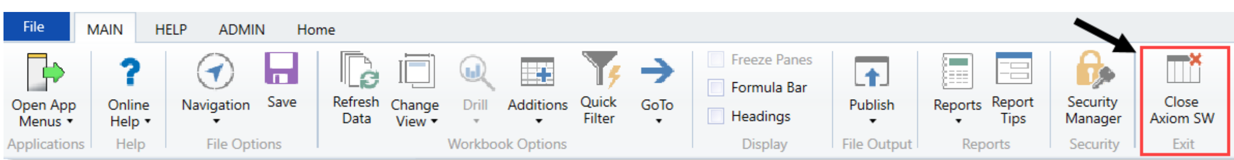
If you have made a comment in a document's message stream, or if you have been tagged in a comment, you are now subscribed to that document's message stream. Whenever a new comment is made to that document's message stream, you will receive a notification in the Notifications task pane.

The notification details the user who made the comment and when it was made, the text of the comment, and a link to open the file.

Currently it is not possible to unsubscribe from a document's message stream once you have been subscribed.

Exiting Axiom Strategy Management

To exit Axiom Strategy Management, 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 Strategy Management prompts you to save any changes to unsaved files.

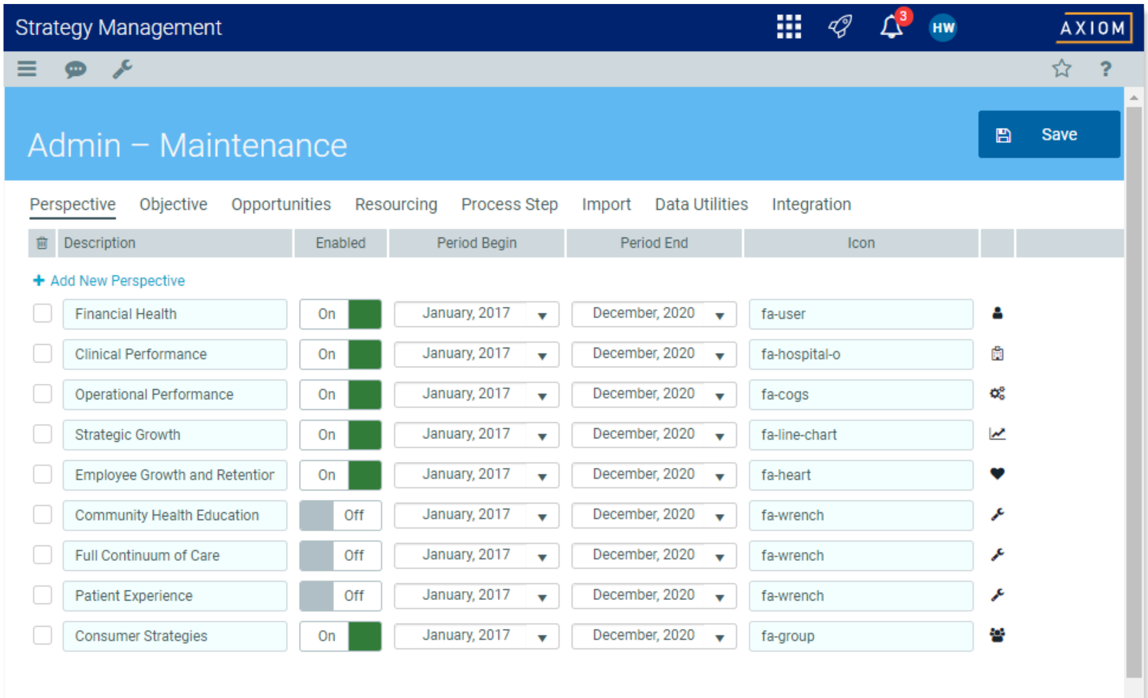
About System Administration

System administration involves basic configuration and maintenance tasks, some that you perform only once and some that you need to perform regularly. You perform most admin tasks from administrative pages in the Web Client, but a couple are performed in the Desktop Client, as noted in this topicsection.

Admin pages

System administrators perform most administration functions in the Admin pages.

Maintenance



Admin Maintenance page example

On the Maintenance page, you perform maintenance tasks on the elements that make up the strategy hierarchy: Perspectives, Objectives, and Initiatives.

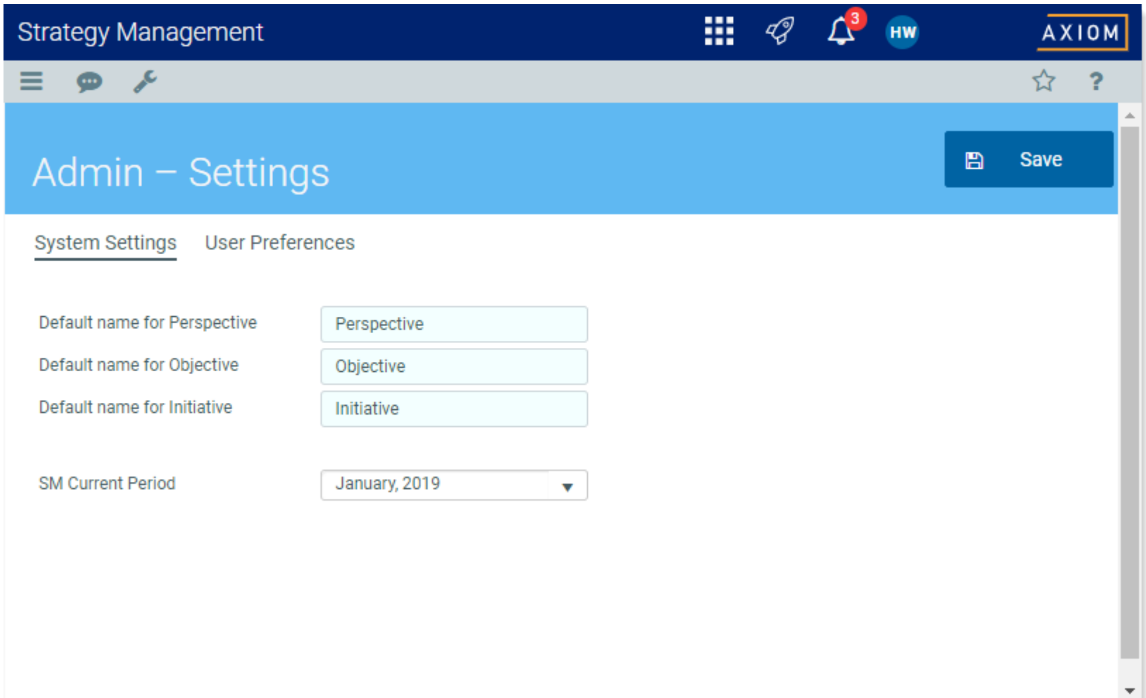
You also create new Perspectives and Objectives here. Initiatives are created elsewhere by users who have the Initiative Creator role. However, you create and manage Opportunities and Resources from this page, both of which are used in Initiatives.

This page also provides access to the following utilities:

Tab	Utility	Description
Process Step	Initiative Pending Reset	Resets Initiatives back to the active tracking stage after the Initiative sponsor approves the updates made by the Initiative owner for the current period. Resetting Initiatives enables them to be updated during the next current period.
Import	Process Plan Files	Integrates imported Initiatives into active tracking.

Tab	Utility	Description
Data Utilities	Update Measure Target Status	Automatically updates the MeetsTarget column entries for all measure data, based on the MeetsTargetDirection values set for each measure.
	Update Period Measure Data	Updates period measure data values, target values, and benchmark values.
	Create Measure Data	Automatically creates measure data rows with populated target fields for hierarchy items when a new measure with a defined target is added to the hierarchy item.
	Delete Aborted Initiatives	Automatically removes all aborted Initiatives and their related data from the Axiom Strategy Management system, including the Initiatives data tables.
	Delete Orphan Measure Data	Automatically removes measure data left over from changing a hierarchy measure’s time frame.
	Update Measure Data Actuals	Automatically updates hierarchy measure data from actuals imported to the system. This utility runs daily but administrators can run it on demand at any time.
	Resolve Exceptions	Helps administrators track and identify data exceptions that need to be resolved when data imported to the system does not match up with data in the system. Displays the mismatched data in the Resolve Measure Data Exceptions form.

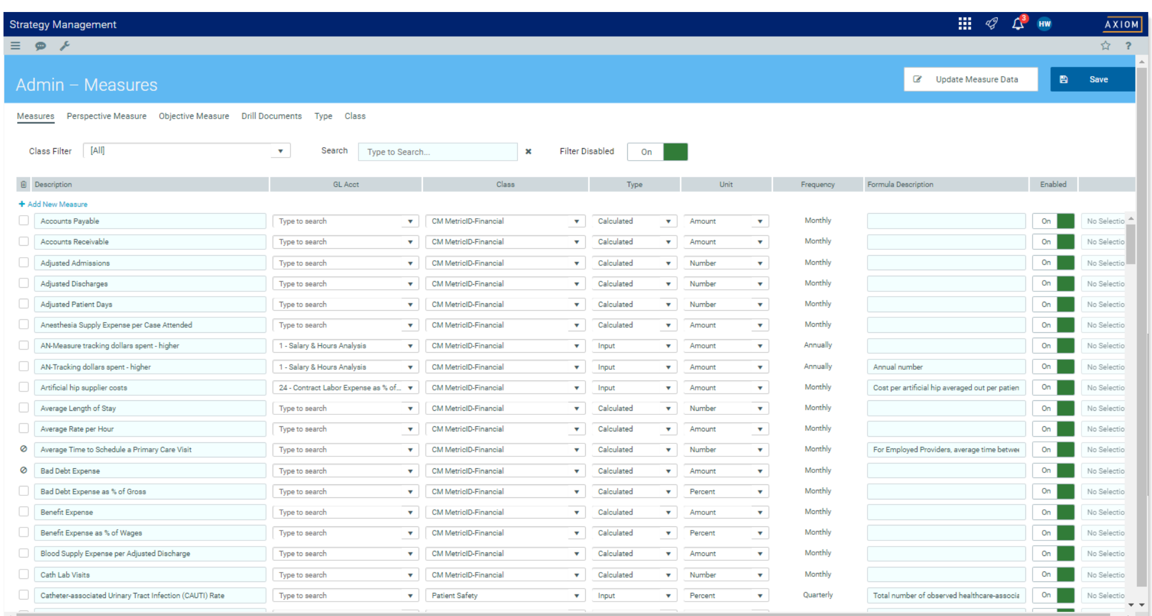
Settings



Admin Settings page example

On the Settings page, you can change the default system names for Perspectives, Objectives and Initiatives; manage user preferences; and update the Current Period for the system.

Measures



Admin Measures page example

You maintain Perspective measures, Objective measures, and measures used by Initiatives from the Measures page. Maintaining measures includes regularly updating measure data, and occasionally adding, editing, enabling, disabling, or deleting measures. You can also assign drill documents to drills.

Desktop Client Admin tasks

The following administrative tasks are currently only available from the Desktop Client or involve using the Desktop Client.

- Initiatives – Import Initiatives in bulk
- Measures
  - Add a benchmark to a measure
  - Create a measure drill
- Security – Manage user roles

3

Configuring Settings

Changing default system names is a task you should perform only once, when your system is implemented or shortly thereafter.

Instructions for the following tasks apply to working in the Admin Settings page of the Web Client.

- Change default system names – Use this setting to change the default names “Perspective,” “Objective,” or “Initiative” if desired.
- Enable or disable the Initiative Overview tab – Use this setting to re-enable the Overview tab on the Initiative plan file page for users who have disabled it and want it back.
- Update the current period – Use this setting to update the current month and year displayed at the top right of most Axiom Strategy Management pages.

Change default system names

System Settings control default names for the main strategic entities in Axiom Strategy Management: Perspective, Objective, and Initiative. You can change these to something else when your system is initially set up and configured. For example, you could change “Perspective” to “Pillar.”

IMPORTANT: To avoid data integrity problems, do not change system names once they are being used, and the named items have attached data in the system. You should reset names only once, and at the time Axiom Strategy Management is first set up.

To change a default name:

1. In the **Navigation** panel, click **Admin** > **Settings**.
2. On the **Settings** page, click the **System Settings** tab if it is not already selected.
3. In the field for the name to change, delete the old name and then type the new one.
4. Click **Save**.

Update the current period

Throughout Axiom Strategy Management, you and other users interact with the system during a span of time referred to as the *current period*. The current period displays at the top right of the main Axiom Strategy Management pages.

The system administrator updates the current period when it is time to roll to the next period. The month used as the current period depends on your organization's fiscal schedule.

IMPORTANT: Axiom Strategy Management uses measure data for the current period when calculating performance. Be aware that using an open fiscal period may cause the performance of some items to be inaccurately represented if measure data for those items has not been entered for the current period. We recommend using the most recent completed, closed fiscal period, if possible, so that the KPI icons accurately reflect the performance of your Perspectives, Objectives, and Initiatives.

NOTE: Other Axiom software products may have their own defined current periods. As used here, the current period applies to the Axiom Strategy Management system.

To update the Axiom Strategy Management current period:

1. Ensure that all measure data has been recorded and, if applicable, approved, for the period you are rolling from.
2. In the **Navigation** panel, click **Admin** > **Settings**.
3. On the **Settings** page, click the **System Settings** tab if it is not already selected.
4. Below the default name settings, from the **SM Current Period** drop-down, select the month and year. You can also search for the month and year by typing the month in the **Type to search** field. Add a comma after typing the name of the month, to view available years.
5. Click **Save**.

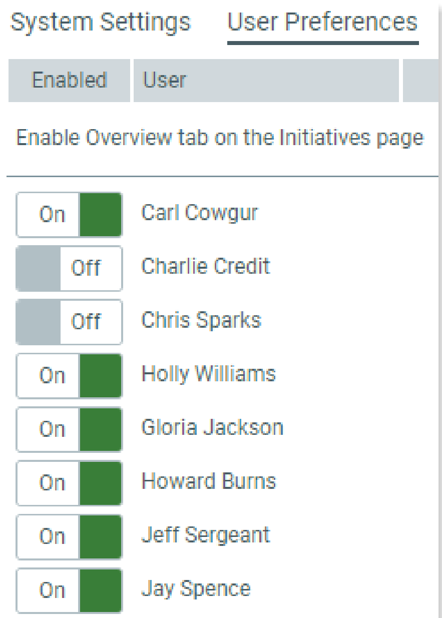
Enable or disable the Initiative Overview tab

In Initiative plan files, the Overview tab is enabled by default. Initiative creators and other users who have access to Initiative plan files in the Web Client can disable the Overview tab that provides instructions on creating Initiatives. If, however, a user wants to re-enable the tab, there is currently no way for the user to do that in Initiatives plan files. As system administrator, you can re-enable the tab for any user.

To enable or disable the Initiative Overview tab:

1. In the **Navigation** panel, click **Admin** > **Settings**.
2. On the **Settings** page, click the **User Preferences** tab.

When an Enable Overview tab setting is set to On, the user can see the Overview tab; when it is set to Off, they cannot:



User Preferences tab showing which users have enabled/disabled the Initiative Overview tab

3. Click the **Enabled** toggle to **On**.
4. Click **Save**.

The next time the user visits the Initiatives page, the Overview tab will display. If it is not, ask the user to refresh the page.

4

Maintaining the strategy hierarchy

During initial setup of Axiom Strategy Management, your Kaufman Hall consultant adds default data and sets up any existing Perspectives and Objectives. Your system will require some additional configuration, and you will need to regularly perform maintenance tasks. See the following topics for information and instructions.

- Maintaining Perspectives – Add, enable, disable, or change the active period for Perspectives.
- Maintaining Objectives – Add, enable, disable, or change the active period for Objectives.
- Maintaining Initiatives– Bulk import Initiatives, reset updated Initiatives to Active Tracking, and maintain opportunities and resourcing used in creating Initiatives.
- Delete aborted Initiatives – Remove aborted Initiatives from the system, including from all related data tables.
- For information on maintaining measures and related data, see About maintaining measures.

Maintaining Perspectives

Axiom Strategy Management comes with default Perspectives that you can either use as-is, edit to suit your organization's needs, or delete from the system. You can also add new Perspectives. After you set up Perspectives, the only maintenance they require is enabling or disabling based on their Period Begin and End dates. Measures applied to enabled Perspectives do require regular updating.

Add a Perspective

Setting up a Perspective involves creating the Perspective and then adding at least one measure to it to track its performance during its active period.

To add a new Perspective:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Perspectives** tab if it is not already displayed.
3. On the left side of the page under the **Description** column heading, click **Add New Perspective**.
4. In the **Add New Perspective** dialog, do the following:
    a. In the **Description** field, type a name for the Perspective.

> **NOTE:** This field has a 150-character limit.

b. To enable the Perspective, click the **Enabled** toggle to **On**.

> **NOTE:** Disabled Perspectives cannot be selected for Objectives, nor will they display on the Dashboard.

c. In the **Begin Period** drop-down, select the start date.

d. In the **End Period** drop-down, select the end date.

e. Click **OK**.

5. (Optional) Select an icon for the Perspective: In the **Icon** column for the new Perspective, type or paste the code for the new icon. For instructions on how to get more icons, see Get Perspective icons.

> **NOTE:** You cannot change the color of Perspective icons.

6. Click **Save**.
7. Add a Perspective measure.
8. Add an Objective.

Edit or delete a Perspective

After Perspectives are set up, you probably will not need to edit them except to enable or disable them, or change their active period.

Edit tasks can include:

- Activating a Perspective that is ready for use
- Disabling a Perspective that is no longer in use or that is not ready for use
- Changing Period Begin and End dates
- Changing the Perspective icon
- Changing the Perspective name
- Deleting a Perspective that was created in error or never used or is not being used by an Objective

To edit a Perspective:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. Click the **Perspectives** tab if it is not already displayed.
3. Do any of the following as needed:
   - To activate a disabled Perspective, click the **Enabled** toggle to **On**.

- To disable a Perspective, click the **Enabled** toggle to **Off**.
- To change the **Period Begin** and **Period End** dates, select the desired date from the drop-down lists.

> **NOTE:** Be aware of how any associated Perspective measures are affected by a time frame change, and edit those as well where needed.

- To change the icon, in the **Icon** column, type or paste the code for the new icon. For instructions on how to obtain icon codes, see Get Perspective icons.
- To change the Perspective name, type the new name in the **Description** field.

> **NOTE:** A name change will be reflected everywhere the Perspective name is used in the system, including historical reports. The exception is when the name appears in snapshots.

- To delete a Perspective that was created in error or never used and has no attached data, Objectives, or Initiatives, click the check box to the left of the **Description** field. The Perspective is deleted after you save your changes.

4. Click **Save**.

Maintaining Objectives

Like Perspectives, you can enable or disable Objectives and assign measures to them. Objectives are tied to a period of activation during which the measure associated with the Objective can collect data. Each Objective must be associated with a single Perspective. Objectives usually have associated Initiatives, although this is not required.

Admins manage Objectives from the Objective tab on the Admin Maintenance page. In addition to listing all Objectives in the system, this tab also lists Objectives associated with a disabled Perspective.

Add an Objective

By default, all enabled Objectives display on the Dashboard.

To add a new Objective:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Objective** tab.
3. On the left side of the page under the Description column heading, click **Add New Objective**.
4. In the **Add New Objective** dialog, do the following:

a. In the **Description** field, type a name for the Objective.

> **NOTE:** The Description field has a 150-character limit.

b. To enable the Objective, click the **Enabled** toggle to **On**.

> **NOTE:** Disabled Objectives do not display on the Dashboard and cannot be associated with Initiatives.

c. From the **Perspective** drop-down, select the Perspective to associate with this Objective. This step is required before you can save the Objective.

d. In the **Begin Period** drop-down, select the start date.

e. In the **End Period** drop-down, select the end date.

f. If the Objective owner is someone other than yourself, then from the **Owner** drop-down, select the desired user.

> **NOTE:** By default, the person creating the objective is listed as the owner.

g. Click **OK**. The measure is added to the end of the Objective measure list.

5. Add a measure to the Objective.

Edit or delete an Objective

Edit tasks can include:

- Activating an Objective that is ready for use
- Disabling an Objective that is no longer in use or that is not ready for use
- Changing the Objective name
- Changing the Period Begin and End dates
- Changing the Objective owner
- Changing the associated Perspective (not recommended)
- Deleting an Objective that was created in error or never used and has no associated data

To edit or delete an Objective:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Objectives** tab.
3. Do any of the following as needed:
    - To activate a disabled Objective, click the **Enabled** toggle to **On**.
    - To disable an Objective, click the **Enabled** toggle to **Off**.

- To change an Objective name, in the **Description** field, type the new name.

> **NOTE:** A name change will be reflected everywhere the Objective name is used in the system. This is useful if you discover a typo or if you want to distinguish the name from another similarly-named Objective.

- To change the **Period Begin** and **Period End** dates, select the desired date from the drop-down lists.

> **NOTE:** Be aware of how any associated Objective measure frequency periods are affected by a time frame change, and edit those as well where needed.

- To change the associated Perspective, select the desired Perspective from the **Perspective** drop-down.

> **IMPORTANT:** If you change the Perspective to which an Objective is associated and that Objective has accrued historical data, all the historical data will move to the new Perspective.

- To change the Objective owner, in the **Owner** field, select a different user from the drop-down.
- To delete an Objective that was created in error or never used and has no attached data or Initiatives, click the check box to the left of the **Description** field. The Objective is deleted after you save your changes.

4. Click **Save**.

Maintaining Initiatives

As system administrator, you maintain some of the elements used in creating Initiatives as well as resetting Initiatives to the active stage after their measure data has been updated and approved each fiscal period. You may also need to import a file of Initiatives.

Maintenance tasks for Initiatives include:

- Maintaining opportunities used in creating Initiatives
- Maintaining resources used in creating Initiatives
- Resetting Initiatives to active tracking status
- Importing Initiatives in bulk
- Creating Initiatives from Capital Planning data
- Deleting aborted Initiatives
- Updating Initiative measure data – The Initiative owner typically updates Initiative data, but if you ever need to, use these instructions.

Maintaining opportunities

You can use opportunities as guides in the Initiative creation and approval process. Initiative creators are prompted to answer the opportunity questions to show how the Initiative they are submitting aligns with the Objective and Perspective (or other Initiatives), with which it is associated. When reviewing an Initiative for approval, approvers can also read these questions and answers to help them evaluate the Initiative. Currently, responding to opportunity questions is not mandatory for Initiative creators.

Add an opportunity

Keep opportunity questions broad enough to fit any Initiative because enabled opportunities are available during the Initiative creation process for all Initiatives.

To add an opportunity:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Opportunities** tab.
3. On the left side of the page under the column headings, click **Add Opportunity**.
4. In the **Add Opportunity** dialog, do the following:
   a. In the **Description** field, type a question that you want an Initiative creator to consider when creating an Initiative.

      > **NOTE:** The Description field has a 150-character limit. The number of characters used displays to the right of the field. You can see how many characters you have used by clicking on a blank area outside the field.

   b. To activate the opportunity, click the **Enabled** toggle to **On**.
   c. Click **OK**.
5. Click **Save**.

Edit or delete an opportunity

Editing tasks can include:

- Changing the opportunity text
- Enabling an opportunity
- Disabling an opportunity so it does not display in Initiative plan files
- Deleting an opportunity that was created in error or never used

To edit or delete an opportunity:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Opportunities** tab.
3. Do any of the following as needed:

- To activate a disabled opportunity, click the **Enabled** toggle to **On**.
- To disable an opportunity, click the **Enabled** toggle to **Off**.

  NOTE: If you disable an opportunity, the opportunity no longer displays in the Opportunities tab for any Initiative plan file.

- To change the text, in the **Description** field, delete the text you do not want, and type the new text.

  IMPORTANT: Be aware that the text will change for this opportunity in all Initiative records.

- To delete an opportunity, click the check box to the left of the **Description** field. The opportunity is deleted when you save your changes.

  NOTE: You cannot delete an opportunity that is currently enabled or that is in use by a record. If you cannot delete an opportunity, an error message displays with an explanation.

4. Click **Save**.

Maintaining resourcing

Resourcing ensures that whenever an Initiative requires a certain resource, the need for that resource is communicated to the right people so they can be sure it is available when needed. Enabled resources are available for selection in all Initiatives.

Add a resource

To add a resource:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Resourcing** tab.
3. On the left side of the page under the column headings, click **Add Resource**.
4. In the **Add Resource** dialog, type a name for the resource in the **Resource** field.

   NOTE: The Resource field has a 150-character limit. The number of characters entered displays to the right of the field after you save.

5. To activate the resource so Initiative creators can use it, click the **Enabled** toggle to **On**.
6. Click **OK**.

Edit or delete a resource

Edit tasks can include enabling, disabling, deleting, or changing the description of a resource.

To edit or delete a resource:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Resourcing** tab.
3. Do any of the following as needed:
   - To activate a disabled resource, click the **Enabled** toggle to **On**.
   - To disable a resource, click the **Enabled** toggle to **Off**.
   - To change the description, replace the text in the **Description** field.

     NOTE: Changing the Description affects all the records in which the resource appears, so unless the change is to correct a typo or improve the phrasing, do not re-purpose a resource; instead, disable it and create a new one.

   - To delete a resource, click the check box to the left of the **Description** field. When you save changes on this page, the resource is deleted.

     NOTE: Do not delete a resource that is currently in use by an Initiative or that is attached to historical data. It is better to retire (disable) the resource instead.

4. Click **Save**.

Reset Initiatives to active tracking

The Initiative update review process requires the system administrator to reset Initiatives back to the active tracking stage after the Initiative sponsor approves the updates made by the Initiative owner for the current period. Resetting Initiatives enables them to be updated during the next current period.

To reset Initiatives to active tracking status:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Process Step** tab.
3. In the **Initiative Pending Reset** section on the right, review the listed Initiatives to be sure they are all ready to be reset.
4. If an Initiative does not belong in the list:
   a. In the **Navigation** panel, click **Initiatives**.
   b. On the **Initiatives** page, click the bookmark icon () to the left of the Initiative.
   c. On the **Initiative routing** page, click **Reject** to reject the current step (Step 7) and send the Initiative back to the previous step.
   d. On the **Process Step** tab of the Maintenance page, in the **Initiative Pending Reset** section, click the refresh button and verify that the Initiative that did not belong is not in the list.
5. Click **Submit**.

6. Click **Save**.

Import Initiatives in bulk

Axiom Strategy Management can contain as many Initiatives as your organization needs. Since there is the potential to have hundreds of Initiatives, we provided a means for system administrators to import Initiatives in bulk. You can manually enter Initiative information to the system, where the Initiatives can be processed into the system for immediate use.

To import Initiatives in bulk:

1. Review the requirements in the following Requirements table.
2. Launch the Desktop Client.
3. If the Explorer task pain is not open, in the **Main** tab of the ribbon, click **Navigation**, and select **Explorer**.
4. In the In the **Libraries** section of the Explorer task pain, expand the **Table Library** and then expand **!Dimensions**.
5. Scroll down to and double-click **Initiative**.
6. In the **Open Table in Spreadsheet** dialog, click **OK**.
7. In the Initiative spreadsheet, scroll down to the first blank row. Add information starting with the **Description** column.

   NOTE: Do not add a number in the first column; the system will add the number after you save the spreadsheet.

8. In the **Main** ribbon tab, click **Save**.
9. In the Web Client **Navigation** panel, click **Admin** > **Maintenance**.
10. On the **Maintenance** page, click the **Import** tab.
11. Click the **Process Plan Files** button to integrate the imported Initiatives into active tracking.

Requirements

Before you begin, you need the following information for each Initiative. The fields are either required or need to contain information to avoid data displaying incorrectly in some forms.

Data field	Format	Description	Lookup location
Description	Text	Initiative name	NA
LongDesc	Text	Detailed description of Initiative	NA

Data field	Format	Description	Lookup location
Objective	Number	Objective to which the Initiative belongs	Table Library> Dimensions> Objective
Department	Number	Department the Initiative applies to, if applicable; otherwise, enter “0” for None	Table Library > Dimensions > DEPT
Owner	Username	User who owns the Initiative	Security Manager
Sponsor	Username	User who sponsors the Initiative	Security Manager
Status	Number	Enter 0 because at this point, the milestones do not have status yet.	Table Library > Strategy Management > Data > Status
Workstream	Number	Workstream for Initiative, if applicable; otherwise, enter “0” for None	Table Library > Strategy Management > Data > Workstream
PhysicianImpact	TRUE/FALSE	If the Initiative impacts physicians, enter “TRUE”, if not, enter “FALSE”	NA
Category	Number	Select a category for the Initiative; otherwise, enter ”0” for None	Table Library > Strategy Management > Data > InitiativeCategory
CapitalInvolved	TRUE/FALSE	If the Initiative requires capital, enter “TRUE’, if not, enter “FALSE”	NA
ApprovalDate	Date & Time M/dd/yyyy 0:00 AM/PM	Date the Initiative was approved for Active Tracking for first time **IMPORTANT:** If you do not enter an approval date, the Initiative status will not be correctly represented in the plan file after import.	NA

Data field	Format	Description	Lookup location
ApprovedBy	Username	User who approved the Initiative to Active Tracking for first time	Security Manager
Active	TRUE/FALSE	Whether the Initiative is currently active	NA
Archived	TRUE/FALSE	Whether the Initiative is currently archived	NA
InitiativeTemplate	Text	Template used to build the Initiative; SM Main if created in Axiom Strategy Management	File Groups > Strategy Management – Requests\Templates
InitiativeShowOnColumn	TRUE/FALSE	Enter "TRUE" to ensure a plan file is created for the Initiative when the administrator uses the Import utility.	NA
InitiativeRequestor	Username	User who created the Initiative **IMPORTANT:** Do not leave the InitiativeRequestor field blank because this could cause unintended data issues.	Security Manager
InitiativeRequestComment	text	Comment added by requestor in Comment field of Generate a New Initiative Request form	Optional
InitiativeSource	SM (or other)	Indicates Axiom product in which Initiative request originated. Enter "SM" for Strategy Management; otherwise, enter code for other integrated product, such as Comparative Analytics (CompA)	NA

Create Initiatives from Axiom Capital Planning data

Axiom Strategy Management administrators can create Initiatives from imported Axiom Capital Planning data for Axiom Strategy Management systems integrated with Axiom Capital Planning.

The Axiom Capital Planning integration utility on the Admin Maintenance page steps you through the process of creating Initiatives from imported Axiom Capital Planning data.

You need the following to use this utility:

- An Axiom Strategy Management system integrated with Axiom Capital Planning, with active licenses for both

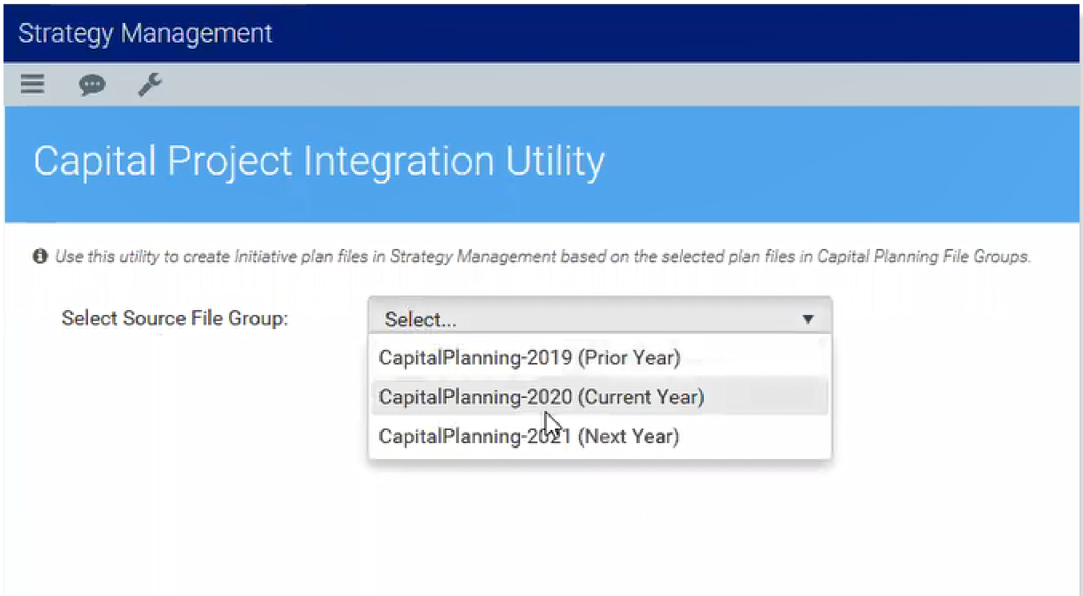
  > **NOTE:** Currently, integration is supported only in the Web Client.

- SM Admin role and the Initiative Creator role
- Any Axiom Capital Planning role

> **NOTE:** The individual CapReqs that are visible to you depend on existing Axiom Capital Planning security.

To create Initiatives from Axiom Capital Planning projects:

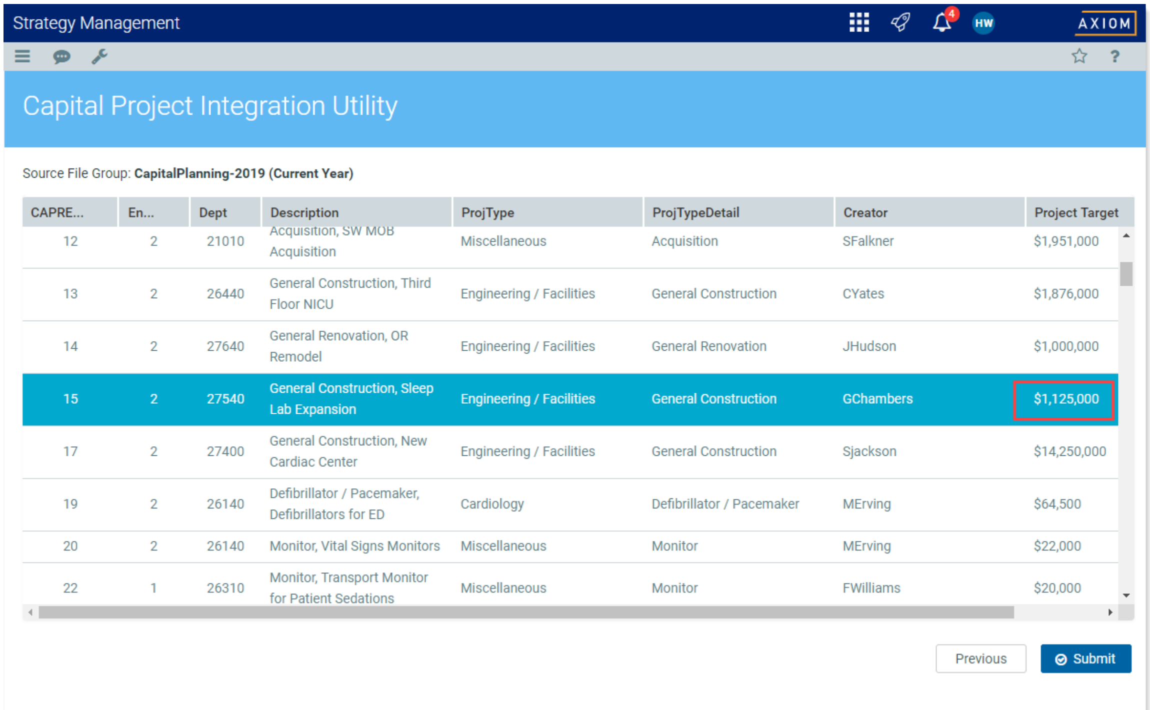
1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Integration** tab.
3. On the **Integration** tab, click the **Capital Planning** utility button.
4. From the **Select Source File Group** drop-down, select the desired Capital Planning year, and then click **Next**.



5. From the **File Group** list, select the desired Capital Requisition, and then click **Submit**.

IMPORTANT: You need to have YRMO records for all of the OrigBudget years in which your projects run.

Notice that there is a Project Target column. The system uses the amount in this column as the new Initiative's Target.



6. In the **Generate a New Initiative Request** dialog, enter all required information. Note that you must select a Frequency. Click **Create Initiative**. (For details, see "Create an Initiative" in the online help.)
7. In the new Initiative's plan file:
   a. Complete the needed information in the rest of the tabs. For details, see "Create an Initiative" in the online help.
   b. In the **Milestone/Measures** tab, add any desired milestones.
   c. For the new Initiative measure, be sure to add a Baseline. You can rename the Initiative measure if desired. The Measure's Start and End dates are based on the years in which the CapReq runs.
   d. To submit the Initiative for review and approval, click **Submit**.

Delete aborted Initiatives

Strategy Management system administrators can purge aborted Initiatives from the system using the Delete Aborted Initiatives data utility.

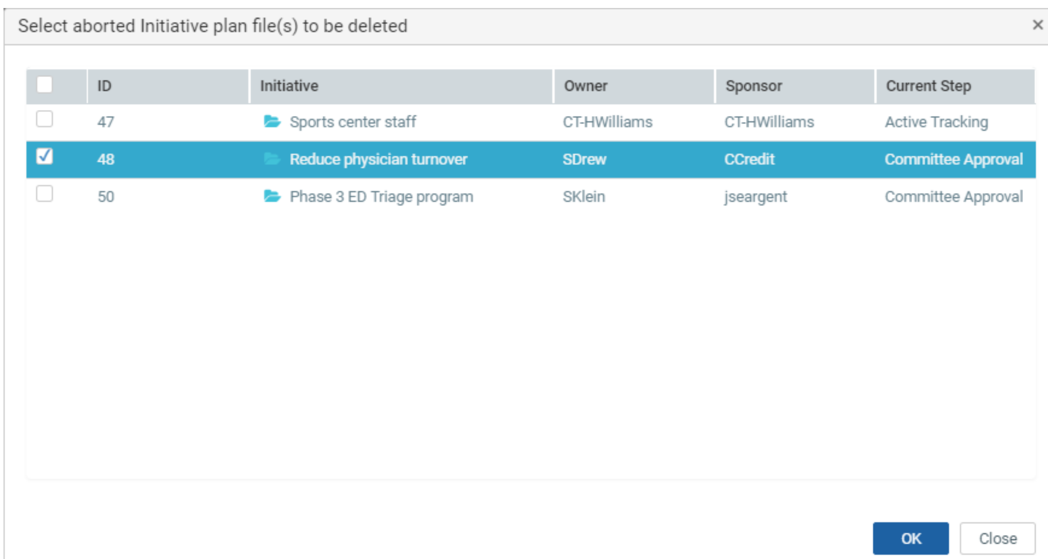
Axiom Strategy Management is designed to house hundreds of Initiatives. Once an Initiative is submitted for Owner approval, it begins to accrue a historical record. Each time an Initiative moves to another stage in the approval process, reviewers and approvers can add comments that also become a part of the historical record. Initiatives and their related data are stored in several data tables in the system.

Some Initiatives get aborted because they are not needed, are duplicates, were created in error, etc. Initiatives can be aborted at two steps in the Creation Approval process: Step 4 – Committee Approval, and Step 5 – Active Tracking. Initiatives must be terminated using the abort process at one of these steps in order to be deleted using the Delete Aborted Initiatives data utility.

> **NOTE:** Initiatives that have been denied should not be confused with aborted Initiatives, or completed Initiatives.

To delete aborted Initiatives from the system:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Data Utilities** tab.
3. Click the **Delete Aborted Initiatives** button.
4. In **the Select aborted Initiative plan file(s) to be deleted** dialog, do one of the following:
   - For each Initiative to delete, select the check box to the left of the ID number.
   - To delete all listed Initiatives, select the check box in the header row.



5. Click **Yes**.

   A small confirmation message displays at the bottom of the page:

The utility removes the selected aborted Initiatives and any related data from the following tables:

- Initiative table
- InitiativeMilestoneData
- InitiativeMeasureData
- InitiativeMilestone

- InitiativeMeasure
- InitiativeResource
- InitiativeOpportunity

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Maintaining measures

Perspectives, Objectives, and Initiatives have associated measures that require initial set up and some maintenance. Axiom Strategy Management comes with some built-in measures, including default measure types and classes. For more information, see About measures.

About the Measures page

The Measures page contains a library of measures available for use in Perspectives, Objectives, and Initiatives. You perform measure maintenance tasks from the Measures page, accessed from the Admin menu in the Navigation panel. The exception is uploading measures in bulk, currently performed in the Desktop Client.

Measures tab – Master list of all measures currently in the system. Perspectives, Objectives, and Initiatives get their measures from this list. Information entered in this tab is stored in the Measure table, accessible from the Desktop Client, and located in the **Table Library** under **Dimensions** > **Measure**. The measures list contains hundreds of measures, but you can filter the list.

Type tab – Lists all the measure types available to use in measures. Information entered in this tab is stored in the MeasureType table, located in the **Table Library** under **Strategy Management** > **Data**.

Class tab – Lists all the measure classes currently in the system. Axiom Strategy Management comes preloaded with a number of measure classes commonly used in the healthcare industry. For example, we have included frequently-used groups as defined by the U.S. Centers for Medicare & Medicaid Services (CMS) and by the Hospital Consumer Assessment of Healthcare Providers (HCAHPS). This information is stored in the Class table located in the **Table Library** under **Strategy Management** > **Class**.

Perspective Measure – Lists all Perspectives and the measures associated with each, including Period Begin and Period End dates, Baseline, Target, Department (optional), and Entity (optional).

Objective Measure – Lists all Objectives and their associated measures, including Period Begin and Period End dates, Baseline, Target, Department (optional), and Entity (optional).

Drill Documents – Lists drill-down documents available for linking to measures, and provides function for adding new drill documents. These documents typically contain details on the associated measure data, and can provide supporting information and additional details about where and how the measure data was derived.

Update Measure Data – Launches the Measure Update web input form used for updating measure data.

Measure maintenance tasks

By default, measures are set to require maintenance on a monthly/current period basis.

Click the following links for instructions on each task:

- Find a measure in the list (filtering measures)
- Add a measure
- Edit a measure or delete an unused measure
- Maintain measure types
- Maintain measure classes
- Update measure data
- Maintain Perspective measures
- Maintain Objective measures
- Create measure data rows
- Delete orphaned measure data
- Update measure target status
- Update period measure data
- Add a benchmark to a measure
- Managing measure drills
- Create a measure drill
- Edit or delete a measure drill

Filter the Measures list

Axiom Strategy Management can contain hundreds of measures listed under the Measures tab on the Measures page. You can filter the list to find the measure you want.

NOTE: These instructions assume you are already on the Measures tab of the Admin Measures page.

To filter the Measures list:

1. From the **Class Filter** drop-down, select one of the following:
   - If you know the class the measure belongs to, select the class.
   - If you do not know the class the measure belongs to, select **All**.
2. Do one of the following:
   - To search for enabled measures only, verify that the **Filter Disabled** toggle is set to **On**.
   - To search for enabled and disabled measures, click the **Filter Disabled** toggle to **Off**.
3. In the **Search** field, click near the middle to activate it, and then type a word or two to search on,

and press **Enter**.

The search returns all measures that match your search terms.

> **NOTE:** If a measure name is too long to be displayed in full, hover your cursor over the name to see the full name in a tool tip.

4. To clear the search field for a new search, click the small **x** icon to the right of the **Search** field, and repeat steps 1 through 3.

Add a measure

System administrators can add measures to the main measures list.

To add a measure to the main Measures list:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Measures** tab if it is not already selected.
3. On the left under the **Description** column heading, click **Add New Measure**.
4. In the **Add New Measure** dialog, do the following:
    a. In the **Description** field, type a name for the measure. This field has a 150-character limit.
    b. From the **Precision** drop-down, select the number of data places to include after the decimal when measure data is displayed in Measure Details windows:
        - **0** – No digits display after the decimal
        - **1** – One digit displays after the decimal
        - **2** - Two digits display after the decimal (default setting)
    c. To enable the measure after saving it, click the **Active** check box.
    d. From the **Class** drop-down, select a class for the measure.
    e. From the **GL Acct** drop-down, select an account with which to associate this measure.
    f. From the **Favorable** drop-down, select the MeetsTargetDirection for the measure.
    g. From the **Unit** drop-down, select the type of unit that matches the data that the measure collects:
        - **Number** – Select for numeric measure data.
        - **Amount** – Select for currencies.
        - **Percent** – Select for percentages.
    h. From the **Type** drop-down, select the update method used to derive the measure:
        - **Calculated** – Axiom software automatically calculates the measure data whenever a

query is made to the field.

- **Integrated** – The measure data comes from integrated Kaufman Hall Axiom products.
- **Input** – The measure data is entered directly into Axiom Strategy Management from an external source. This data may come from a form with data entered manually or from input utilities.

NOTE: Currently, the Type field is for recording a description of the method used; it does not set any action for the measure.

i. From the **Frequency** drop-down, select how often the measure is updated and reported.

IMPORTANT: Once you set a frequency for a measure and save it, you cannot change the frequency. If the measure is unused and has accumulated no data, you can delete it and start over. Otherwise, retire the measure by disabling it, and then create a new one.

j. (Optional) In the **Formula Description** field, type a description of how the data is derived. For example, if the measure is “Hours paid per patient day” then the formula would be something like “Hours paid divided by Inpatient days” or “Hours paid / Inpatient days.”

- To associate this measure with a drill document, select the desired drill document from the **User Drill** drop-down.
- To not associate this measure with a drill document, select **0 - No Selection** from the **User Drill** drop-down.

NOTE: Measures that have associated drill documents display a Launch Detail button in their Measure Detail window.

5. Click **OK**.
6. Click **Save**.

Edit or delete a measure

The system administrator can edit and delete measures but there are some caveats. After a measure is in use by a Perspective, Objective, or an Initiative, you should not need to edit it unless there is something wrong with the description, formula description, or other attribute that you need to change so that the measure works correctly. You cannot change a measure’s frequency. If the measure is unused and has accumulated no data, you can delete it and start over. Otherwise, retire the measure by disabling it, and then create a new one.

Editing a measure can include:

- Changing the Description
- Enabling or disabling the measure
- Changing the Class
- Changing the GL Account
- Changing the Type (not recommended)
- Changing the Formula Description
- Adding or changing a User Drill
- Changing the decimal display precision
- Deleting the measure

To edit or delete a measure:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. In the **Measures** tab on the **Measures** page, locate the measure. Filter the list if needed.
3. Do any of the following, as needed:
   - To enable the measure, click the **Enabled** toggle to **On**.
   - To disable the measure, click the **Enabled** toggle to **Off**.
   - To edit the measure name, in the **Description** field, type the new name or make corrections to the existing name.

     IMPORTANT: If you change a measure's name (description), this also changes the name in any historical records that have not been saved in static reports.

   - To change the associated GL Account, from the **GL Account** drop-down, select another account, or, to remove the affiliation with an account, click **0-Default ACCT**. The field will revert to the default text "Type to Search" after you save your changes.
   - To change the class, from the **Class** drop-down, select the new class.

     IMPORTANT: If you change a measure's class, this also changes the class in any historical records that have not been saved in static reports.

   - To change the type, from the **Type** drop-down, select the new type.

     IMPORTANT: If you change a measure's type, this also changes the type in any historical records that have not been saved in static reports.

   - To change the formula description, in the **Formula Description** field, type the desired information.
   - To add a user drill for the measure, in the **User Drill** column, select the desired drill from the **User Drill** drop-down.
   - To change the number of values displayed after the decimal, from the **Precision** drop-down

select the desired number.

- To delete a measure:
    a. Verify that the measure is not in use and has no data records attached.
    b. Select the check box at the left end of the measure row. The measure will be deleted after you save changes.

4. Click **Save**.

Maintaining measure types

Measure types are the methodologies used to update and report measure data. Currently, the Type field is for recording a description of the method used; it does not set any action for the measure.

Axiom Strategy Management comes with three measure types:

- **Calculated** – Measure data is calculated automatically by Axiom software whenever a query is made to the field.
- **Input** – Measure data is entered directly into the system from an external source. You may input data manually using forms or enter data in bulk using import utilities.
- **Integrated** – Measure data comes from integrated Kaufman Hall/Axiom products.

Measure types you add or edit from the Admin Measures page are stored in the MeasureType data table.

Add a measure type

You can create additional measure types, if needed.

To add a measure type:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Type** tab.
3. Under the **Description** column, click **Add New Type**.
4. In the **Add New Type** dialog, type a description in the **Description** field. This field has a 150-character limit.
5. To enable this type after saving, click the **Active** check box.
6. Click **OK**. The new type is added to the list of types.
7. Click **Save**.

Edit or delete a measure type

You can change the name and status of a measure type.

IMPORTANT: Do not delete measure types that are used in other data tables because this could cause orphaned data and lead to data integrity errors. Instead, it is better to disable the type so it does not display in the Type selection drop-down. However, if you add a type and decide not to use it, you can delete it as long as it has no attached data.

To edit or delete a measure type:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Type** tab.
3. For the type to edit, do any of the following as needed:
   - To enable a disabled type, click the **Enabled** toggle to **On**.
   - To disable a type, click the **Enabled** toggle to **Off**.
   - To change the name, edit the text in the **Description** field.
   - To delete a type that is not in use in any data table, click the check box to the left of the **Description** field. The type is deleted when you click Save.
4. Click **Save**.

Maintaining measure classes

Measure classes allow you to categorize measures that have one or more common attributes so that you can organize and manage them, and filter them in lists, reports, and Initiative plan files. A number of default measure classes are included in Axiom Strategy Management. These were selected from frequently-used groups defined by the U.S. Centers for Medicare & Medicaid Services (CMS), by the Hospital Consumer Assessment of Healthcare Providers (HCAHPS), and from a large set of standard financial metrics. You can use any of these, disable or delete the ones you do not want, and add your own classes.

Measure classes you access from the Admin Measures page are stored in the Class reference table.

Add a measure class

To add a measure class:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Class** tab.
3. Under the **Description** column, click **Add New Class**.
4. In the **Add New Class** dialog, type a name in the **Description** field. This field has a 150-character limit.
5. To enable this class after saving, click the **Active** check box.

6. Click **OK**.
7. Click **Save**.

Edit or delete a measure class

You can enable and disable a measure class, change its name, or delete it. However, you should not change the number assigned to the class by the system because the system uses these numbers in reports.

> **IMPORTANT:** Do not delete measure classes that are used in other data tables because this could cause orphaned data and lead to data integrity errors. Instead, it is better to disable the class so it does not display in the Class selection drop-down. However, if you add a class and decide not to use it, or to remove any of the default classes that came with Axiom Strategy Management, you can delete them as long as they have no related data in other data tables. The exceptions to this are the performance improvement measure classes, which should not be deleted or renamed.

To edit or delete a measure class:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Class** tab.
3. For the class to edit, do any of the following:
   - To disable a class, click the **Enabled** toggle to **Off**.
   - To enable a class, click the **Enabled** toggle to **On**.
   - To correct an error in the class name, make the change in the **Description** field.

     > **IMPORTANT:** Be aware that changing the class name will change the name in all historical records that have not been saved as static records and archived somewhere.

   - To delete a class that has never been used and is not attached to any data, click the check box to the left of the **Description** field. The class is deleted when you click Save.
4. Click **Save**.

Maintaining Perspective measures

Perspective measures are measures applied from the main measure list to Perspectives. Although the system allows you to create Perspectives without applying measures, you cannot track Perspective performance unless you do. After creating a Perspective, the next step is assigning it one or more measures. The measures you assign depend on how your organization defines the Perspective and which of its aspects you want to track.

Perspective measures you add or edit from the Admin Measures page are stored in the Axiom Strategy Management data table PerspectiveMeasure.

Add a measure to a Perspective

Generally, Perspective measures should be broader than those used for Objectives and Initiatives because Perspectives are at the highest level in the strategy hierarchy. The further down the hierarchy you go, the more specific the measures can be. For example, if your organization is a hospital and you have a Perspective named Clinical Performance, you would want to assign a measure that returns broad measure data, such as the Composite HCAHPS-Overall Hospital Rating.

To add a measure to a Perspective:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Perspective Measure** tab.
3. Locate the Perspective in the list.

   > **TIP:** If the list is expanded, click the **Collapse All** link on the left under the main tabs so you can see only the Perspective names.

4. If the Perspective is collapsed, click the **down arrow** to the left of its name.
5. On the left under the **Measure** column, click **Add New Measure**.
6. In the **Add New Measure** dialog, do the following:
   a. From the **Measure** drop-down, select the desired measure.
   b. If you are tracking this measure at the department level, then from the **Dept** drop-down, select the department.
   c. If you are tracking this measure at the entity level (such as a clinic, hospital location, medical group, etc.), or if you selected a department in the previous step, from the **Entity** drop-down, select the entity.
   d. In the **Period Begin** drop-down, select the month and year for the measure to be active.
   e. In the **Period End** drop-down, select the month and year for the measure to be inactive.
   f. In the **Baseline** field, enter the baseline number to use as the data measurement starting point.
   g. In the **Target** field, enter the target number to use for comparing with data generated by the measure.

NOTE: When setting the Target, be sure you know which direction from the target (higher or lower) is favorable and which is unfavorable for the measure. You can look this up in the Measure table: launch the Desktop Client, open the Explorer task pane, then expand **Libraries** > **Table Library** > **!Dimensions** > **Measure**. Locate the measure in the table and then scroll horizontally to the last column, MeetsTargetDirection.

   h. Click **OK**.

7. Click **Save**.

8. Run the following utilities in this order:

   - Create Measure Data to create the measure data rows for each period in the measure's lifecycle.
   - Update Period Measure Data
   - Update Measure Target Status

IMPORTANT: To avoid data errors, run the utilities. The order is important:
1. Create Measure Data
2. Update Period Measure Data
3. Update Measure Target Status
(The utilities are not listed in the correct execution order on the Admin Maintenance page.)

Edit or delete a Perspective measure

You can change the period dates, baseline, and target data for a Perspective measure. You cannot delete a Perspective measure if it is in use or has data attached. If you want to disable a Perspective measure, you must disable it in the Measures tab.

To edit or delete a Perspective measure:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Perspective Measure** tab.
3. Locate the Perspective in the list.

   TIP: If the list is expanded, click the **Collapse All** link on the left under the main tabs so you can see only the Perspective names.

4. If the Perspective is collapsed, click the **down arrow** to the left of its name.
5. For the desired Perspective measure, do any of the following as needed:
   - To change the Period Begin date, click the **Period Begin** drop-down, and select the desired date.
   - To change the Period End date, click the **Period End** drop-down, and select the desired

date.

NOTE: If you shorten the measure's time frame, after saving your changes, run the Delete Orphan Measure Data utility to remove target data associated with unused future time periods.

- To change the Baseline number, click in the **Baseline** field, and change the number.
- To change the Target number, click in the **Target** field, and change the number.

IMPORTANT: The change may be reflected everywhere the Perspective measure is used, including any historical records that have not been preserved as static reports.

NOTE: Currently, when you change the target number, you must manually update the target in any data rows for future periods in the measure's active period. The Create Measure Data utility does not update existing rows.

- To delete the Perspective measure:
    a. Verify that it can be deleted: if there is a check box to the left of the Perspective measure name, it can be deleted. If there is a circle with a slash through it (⃠) instead of the check box, you cannot delete the Perspective measure.
    b. Select the check box to the left of the measure name. The measure is deleted when you save changes.

6. Click **Save**.

Maintaining Objective measures

Objective measures are measures applied from the main measure library to an Objective so that you can track the performance of the Objective. You can apply as many measures as you like but the number used depends on how you define the Objective and which of its aspects you want to measure. For example, for an Objective named "Improve Patient Access," you could add a measure that assesses the average time it takes a patient to get scheduled for a primary care visit.

Objective measures you add or edit from the Admin Measures page are stored in the Strategy Management data table Objective Measure.

Add a measure to an Objective

Measures applied to Objectives should be more specific than measures applied to Perspectives.

To add a measure to an Objective:

1. In the **Navigation** panel, click **Admin** > **Measures**.

2. On the **Measures** page, click the **Objective Measure** tab.
3. Locate the Objective in the list.

> **TIP:** If the list is expanded, click the **Collapse All** link on the left under the main tabs so you can see only the Objective names.

4. If the Objective is collapsed, click the **down arrow** to the left of its name.
5. On the left under the **Measure** column, click **Add New Measure**.
6. In the **Add New Measure** dialog, do the following:
    a. From the **Measure** drop-down, select the desired measure.
    b. If you are tracking this measure at the department level, then from the **Dept** drop-down, select the department.
    c. If you are tracking this measure at the entity level (such as a clinic, hospital location, medical group, etc.), or if you selected a department in the previous step, then from the **Entity** drop-down, select the entity.
    d. In the **Period Begin** drop-down, select the month and year for the measure to be active.
    e. In the **Period End** drop-down, select the month and year for the measure to be inactive.
    f. In the **Baseline** field, enter the baseline number to use as the data measurement starting point.
    g. In the **Target** field, enter the target number to use for comparing with data generated by the measure.

    > **NOTE:** When setting the Target, be sure you know which direction from the target (higher or lower) is favorable and which is unfavorable for the measure. You can look this up in the Measure table: launch the Desktop Client, open the Explorer task pane, then expand **Libraries** > **Table Library** > **!Dimensions** > **Measure**. Locate the measure in the table and then scroll horizontally to the last column, MeetsTargetDirection.

    h. Click **OK**.
7. Click **Save**.
8. Run the following utilities in this order:
    - Create Measure Data to create the measure data rows for each period in the measure's lifecycle.
    - Update Period Measure Data
    - Update Measure Target Status

IMPORTANT: To avoid data errors, run the utilities. The order is important:
1. Create Measure Data
2. Update Period Measure Data
3. Update Measure Target Status
(The utilities are not listed in the correct execution order on the Admin Maintenance page.)

Edit or delete an Objective measure

You can change the period dates, baseline, and target data for an Objective measure. You cannot delete an Objective measure if it is in use or has data attached. You also cannot enable or disable an Objective measure.

To edit or delete an Objective measure:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Objective Measure** tab.
3. Locate the Objective in the list.

   TIP: If the list is expanded, click the **Collapse All** link on the left under the main tabs so you can see only the Objective names.

4. If the Objective is collapsed, click the **down arrow** to the left of its name.
5. For the desired Objective measure, do any of the following as needed:
   - To change the Period Begin date, click the **Period Begin** drop-down, and select the desired date.
   - To change the Period End date, click the **Period End** drop-down, and select the desired date.

     NOTE: If you shorten the measure's time frame, after saving your changes, run the Delete Orphan Measure Data utility to remove target data associated with unused future time periods.

   - To change the Baseline number, click in the **Baseline** field, and change the number.
   - To change the Target number, click in the **Target** field, and change the number.

     IMPORTANT: The change may be reflected everywhere the Objective measure is used, including any historical records that have not been preserved as static reports.

> **NOTE:** Currently, when you change the target number, you must manually update the target in any data rows for future periods in the measure's active period. The Create Measure Data utility does not update existing rows.

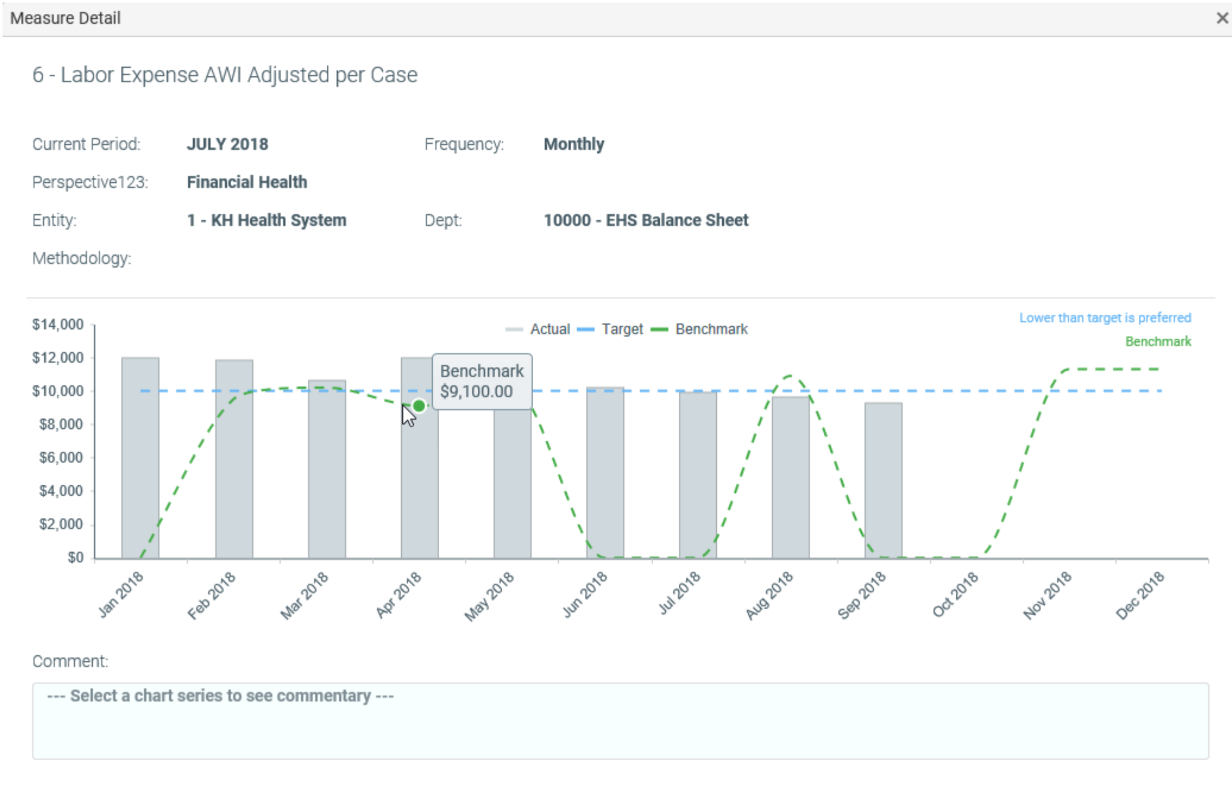
- To delete the Objective measure,
  a. Verify that it can be deleted: if there is a check box to the left of the Objective measure name, it can be deleted. If there is a circle with a slash through it (⃠) instead of the check box, you cannot delete the Objective measure.
  b. Select the **check box** to the left of the measure name. The measure is deleted when you save changes.

6. Click **Save**.

Add a benchmark to a measure

Axiom Strategy Management provides you the ability to add external benchmarks to Perspective, Objective, and Initiative measure data, to help you evaluate how well these items are performing relative to established bench-marked results from similar processes in other medical organizations that are like yours.

System administrators can add benchmarks to Perspective measures, Objective measures, and Initiative measures. Benchmarks are used and displayed in Measure Detail windows, such as in the following example.



Measure Detail example showing monthly benchmark line (green dotted) with point marker displayed where cursor is hovered over line

> **NOTE:** This task is performed in the measure data tables from the Desktop Client.

To add a benchmark:

1. Launch the Desktop Client.
2. In the **Main** tab of the Ribbon, click *Navigation* > **Explorer**.
3. In the **Libraries** section, expand **Table Library**, then scroll down to and expand **Strategy Management** > **Data**.
4. Double-click the desired MeasureData table (e.g., PerspectiveMeasureData, ObjectiveMeasureData, InitiativeMeasureData).
5. In the **Open Table in Spreadsheet** dialog, click **OK**.
6. In the measure data table, locate the desired measure (listed by number, not name) and then scroll to the **Benchmark** column titled **Client-selected Benchmark value by month**.

Client-selected Benchmark value by month	Calendar YTD	Fiscal YTD	Previous Period
Benchmark	**Benchmark_CalYTD**	**Benchmark_FiscYTD**	**Benchmark_Prev**
10200.00	0.00	0.00	0.00
11500.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00
9500.00	0.00	0.00	0.00
10200.00	0.00	0.00	0.00
9100.00	0.00	0.00	0.00
10200.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00

7. For each month that you want to provide a benchmark, enter the number in the column for that month.
8. In the Ribbon's **Main** tab, click **Save**.
9. In the **Save to database completed successfully** confirmation dialog, click **OK**.

Managing measure drills

Axiom Strategy Management provides users the ability to drill down on a measure and see supporting documentation by clicking a link in the measure's Measure Detail window. Supporting documentation can be anything from a report showing where the measure was derived or calculated, to a form or spreadsheet with additional information.

As a system administrator, you can control and customize the reports and other documents that users can drill to from a given measure. When you add a drill to a measure, the system adds a Launch Detail button in the upper right corner of the Measure Drill window. Clicking the button launches the drill document. Drill documents must be stored in the Drill folder accessible from the Desktop Client at **Libraries** > **Reports Library** > **Strategy Management Utilities** > **Drill**. If the document is an Axiom web-enabled report or form, it opens in the browser. If the document is another type of file, such as a PDF or Excel spreadsheet, the system opens it from the Desktop Client in a separate window.

Create a measure drill

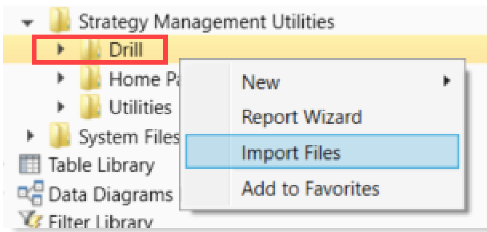
Use these instructions to add a document drill to a measure to create a drill down in the measure's associated Measure Detail window. Creating a measure drill involves three main steps: 1) add the drill document to Strategy Management, 2) create a drill for the document, and 3) associate the drill with the desired measure.

To create a new document drill:

1. In the Desktop Client, place the drill document in the Drill folder:

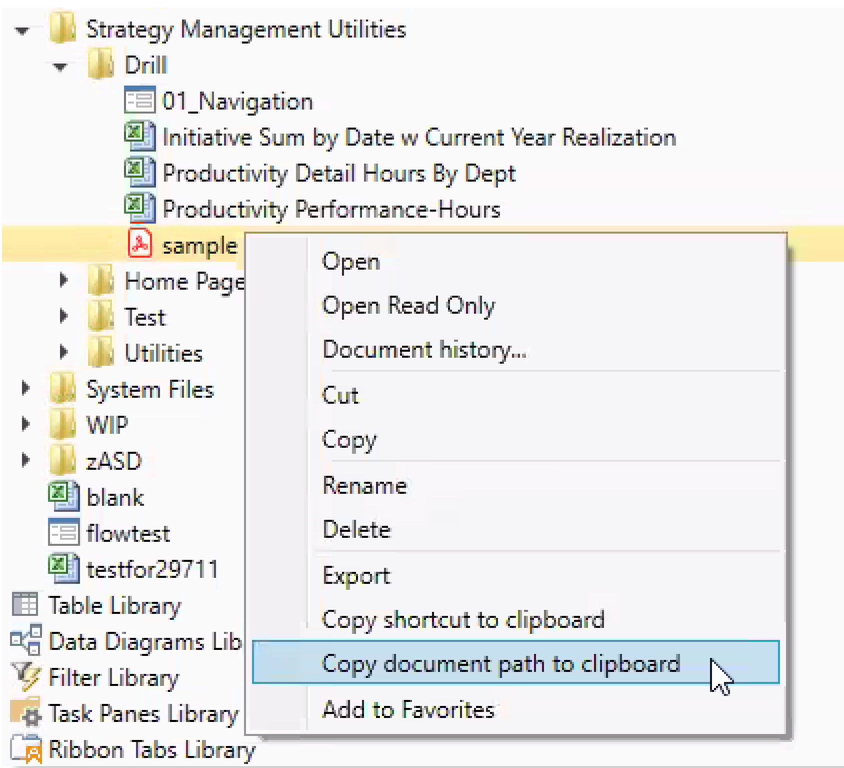
   a. Navigate to **Libraries** > **Reports Library** > **Strategy Management Utilities** > **Drill**.

   b. Right-click the **Drill** folder and select **Import Files**.

   c. Select the desired file and click **Open**.

2. Expand the **Drill** folder, right-click the file and select **Copy document path to clipboard**. You will need to paste this path into the Add Drill Document dialog in step 6c.

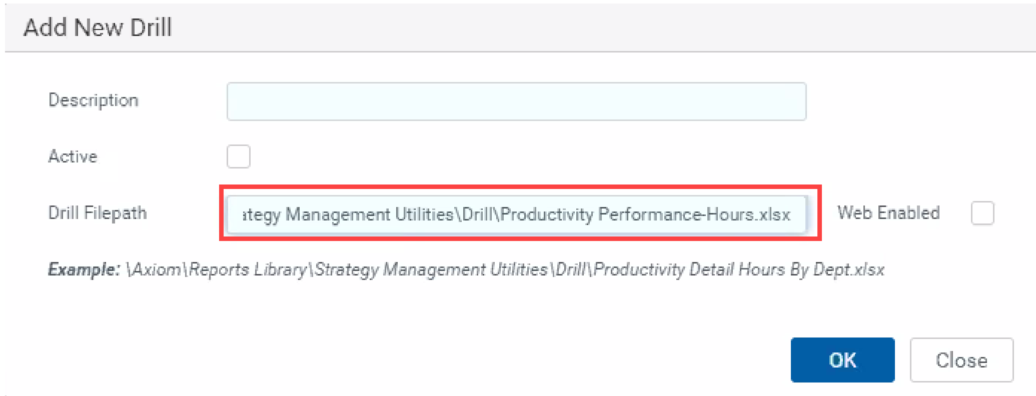


3. In the Web Client, in the **Navigation** panel, click **Admin** > **Measures**.
4. On the **Measures** page, click the **Drill Documents** tab.
5. On the left under the **Description** column heading, click **Add New Drill**.
6. In the **Add New Drill** dialog, do the following:

a. In the **Description** field, type a name for this drill.

b. To enable this drill immediately after creation, select the **Active** check box.

c. In the **Drill Filepath** field, paste the file path you copied in step 2.



(To see how users access a drill document, see Drill on measure details.“Drill on measure details” in the online help.)

d. If the drill document is an Axiom report or form, click the **Web Enabled** check box to enable the form to open in the browser.

> **NOTE:** Do not select the check box if the document is another type of file, such as a PDF or Excel spreadsheet. The system opens these types of files from the Desktop Client in separate window.

e. Click **OK**.

7. Click **Save**.

8. Next, assign this drill to the desired measure. Do one of the following:
   - If the measure does not currently exist, follow the instructions in Add a measure.
   - If the measure exists, navigate to the **Admin - Measures** page. In the **Measures** tab, locate the measure. In the **User Drill** column for the measure, select the desired drill from the drop-down. Click **Save**.

> **IMPORTANT:** The drill document will be accessible for all hierarchy items that use the associated measure, so be sure that the document applies to all instances in which the measure is used or could be used. Alternatively, you can create a copy of the measure and give it a specific name and then associate the drill only to that version.

Edit or delete a measure drill

The system administrator can edit and delete measure drills; however, a measure drill cannot be deleted if it is associated with a measure.

You can edit the following for a measure drill:

- Change the drill name
- Enable or disable the drill
- Delete the drill if it is not in use

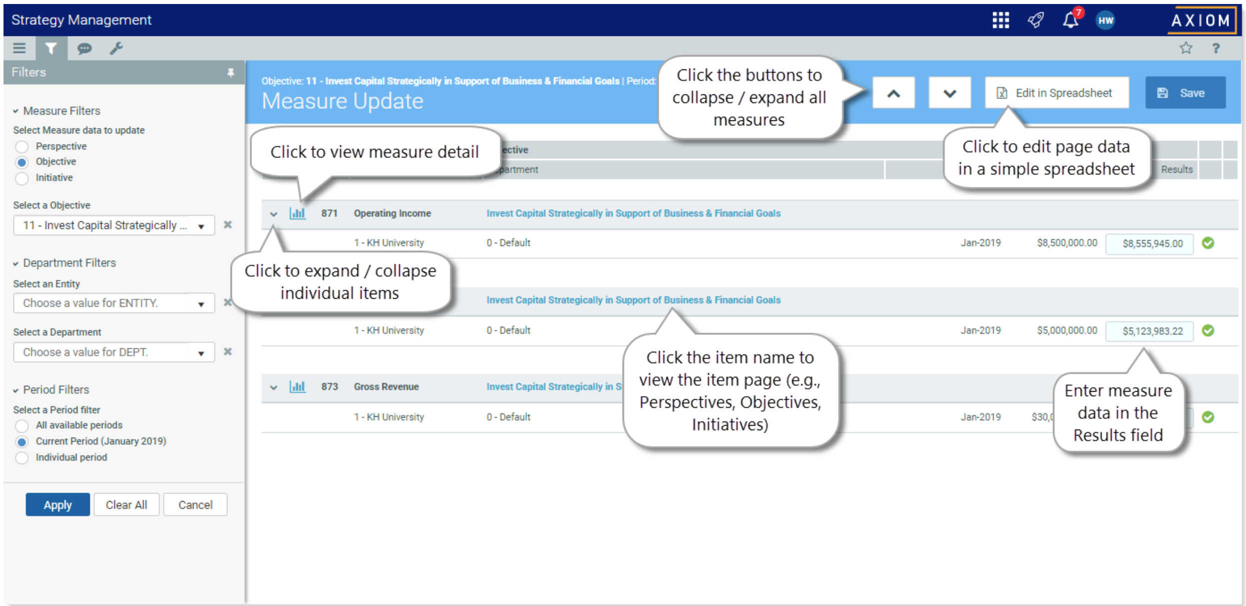
> **NOTE:** You cannot change the document associated with a drill. Instead, create a new drill for the new document, then remove the old drill from any measures, and then delete the old drill. Assign the new drill to the measure(s).

To edit or delete a measure drill:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, click the **Drill Documents** tab.
3. Do any of the following, as needed:
   - To change the name, type changes in the **Description** field.
   - To enable / disable a drill, in the **Enabled** column, click the toggle to the desired state.
   - To delete a drill:
     a. Verify that it is not in use. If the drill is in use, remove it from all associated measures.
     b. Click the checkbox to the left of the drill name. The drill will be deleted when you save your changes.
4. Click **Save**.

Update measure data

The Measure Update page enables you to update data for one or more Perspective, Objective, or Initiative measures, in a convenient web form.

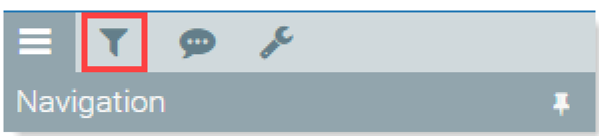


Measure Update page example

To update measure data:

1. In the **Navigation** panel, click **Admin** > **Measures**.
2. On the **Measures** page, in the header, click the **Update Measure Data** button.

   The Measure Update page opens.
3. Open the Filters panel: in the header menu above the navigation panel, click the **Filters** icon.

4. In the **Measure Filters** section, from the **Select Measure data to update** drop-down, select the type of measure to update.

   The type of measure you select here determines the options available in the next drop-down. For example, if you select Perspective, the next drop-down will contain a list of Perspectives.
5. To update a measure for a specific Perspective, Objective, or Initiative, in the **Select a [item]** drop-down, select the desired item. Otherwise, leave this field blank to update all measures for that item type.
6. If the measure is associated with a specific entity or a department within an entity, in the **Department Filters** section, select the entity and then the department from the corresponding drop-downs.
7. In the **Period Filters** section, select one of the following as applicable:

- **All available periods** – Returns all records for all periods that have that kind of data. For example, if you are updating Objective measure data, the system returns all Objective measure records.
- **Current Period** – Returns all records that have that kind of data for the current period.
- **Individual period** – Select the desired period from the drop-down.

8. Click **Apply**.

   The filtered measures display in the Measure Update page.

   > **TIP:** To see the detail for a measure, click the graph icon ( ) to the left of the measure name at the top of the Measure column. If the measure has multiple entity or department combinations, a pop-up dialog prompts you to select the entity/department to view.
   > For information on viewing related drill data (if applicable), see "Drill on measure details" in the online help.

9. To update a measure, click the **Results** field and type the value, then press **Enter**.
10. When finished updating values, click **Save**.
11. In the Axiom Software prompt, click **OK**.
12. To ensure that the posted values update for reports that use period measure data (such as the Cost Reduction Status report), run the following utilities in the following order:
    - Create measure data rows
    - Update period measure summary data
    - Update measure target status

Create measure data rows

The Create Measure Data utility allows system administrators to automatically create measure data rows for hierarchy items.

About the Create Measure Data utility

Users need to be able to view measure data targets in charts and reports for comparison and analysis purposes, for each time period (frequency) set for a measure.

System administrators need to be able to set measure targets to respond to changing expectations.

To make this possible, the target needs to be set in each hierarchy item's MeasureData table (i.e., PerspectiveMeasureData, ObjectiveMeasureData, InitiativeMeasureData) for each frequency period that the hierarchy item measure is active. This means the Target field needs to be populated for future time periods (months/quarters/half-years/years) according to the measure's frequency.

Instead of manually creating new rows for future frequency periods in the hierarchy item's active period and then entering the target data, the Create Measure Data utility automatically creates a row with the set target for each frequency period through the end of the fiscal year for the length of the measure's active period (start date to end date).

For example, if an Objective measure starts on January 2018 and ends on December 2019, the utility creates rows in the ObjectiveMeasureData table with the target column pre-populated for all YRMOs from January 2018 to the end of the fiscal year in which December 2019 falls.

However, if a measure is quarterly, the utility creates a row for the end of each quarter for the lifespan of the measure. So if the measure life span is one FY, the utility enters 4 rows. Likewise, for a semi-annual frequency, a measure would have two rows for each FY, and a measure with an annual frequency would have one row for the FY.

The following example shows a section from the ObjectiveMeasureData table for an Objective with measure #853. The active period for that measure is outlined in red. The rows in the area outlined in green are for future periods that have no measure data yet, but do have populated target data. Because the measure has a monthly frequency and the measure lifespan is set at 18 months, there are 18 rows—one for each month in the lifespan.

	B	D	E	F	G	H	I	J	K	L
4	***Data Type***	*Integer*	*Integer*	*Integer*	*Integer*	*Integer 32*	*Numeric*	*Numeric*	*Numeric*	*Boolean*
5	***String Length***									
6	**Description**	Objective	Measure	Departme nt	Entity	YRMO	Value	Target	Score	
8	Delete Row	**Objectiv**	**Measur**	**Dept**	**Entit**	**YRMC**	**Value**	**Target**	**Scor**	**MeetsTarge**
81		2	853	0	0	201801	18.25	25.00	0.00	TRUE
82		2	853	0	0	201802	23.50	25.00	0.00	TRUE
83		2	853	0	0	201803	21.02	25.00	0.00	TRUE
84		2	853	0	0	201804	17.65	25.00	0.00	TRUE
85		2	853	0	0	201805	19.73	25.00	0.00	TRUE
86		2	853	0	0	201806	19.85	25.00	0.00	TRUE
87		2	853	0	0	201807	24.29	20.00	0.00	FALSE
88		2	853	0	0	201808	18.40	20.00	0.00	TRUE
89		2	853	0	0	201809	20.18	20.00	0.00	FALSE
90		2	853	0	0	201810	0.00	20.00	0.00	TRUE
91		2	853	0	0	201811	0.00	20.00	0.00	TRUE
92		2	853	0	0	201812	0.00	20.00	0.00	TRUE
93		2	853	0	0	201901	0.00	20.00	0.00	TRUE
94		2	853	0	0	201902	0.00	20.00	0.00	TRUE
95		2	853	0	0	201903	0.00	20.00	0.00	TRUE
96		2	853	0	0	201904	0.00	20.00	0.00	TRUE
97		2	853	0	0	201905	0.00	20.00	0.00	TRUE
98		2	853	0	0	201906	0.00	20.00	0.00	TRUE
99		2	854	0	0	201701	198.89	210.00	0.00	TRUE
100		2	854	0	0	201702	225.45	210.00	0.00	FALSE

These prepopulated rows allow a system administrator to change the target for future time periods if the measure's data expectations require realignment.

IMPORTANT: When you add a measure to an Initiative in the Initiative plan file page, data rows are automatically created for each frequency period in the InitiativeMeasureData table when you save the Initiative. If you want the target to be included in the data rows, you must add the target before you save the Initiative.

When to run this utility:

- After adding a measure (with a set target) to a Perspective or an Objective
- After importing Initiatives that do not already have measure data rows for every period in their measures' active life cycles

NOTE: This utility only creates measure data rows with a populated target if they are missing; it does not update a changed target.

To create measure target data rows:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Data Utilities** tab.
3. Click the **Create Measure Data** button.
4. Click the **Update Period Measure Data** button to perform calculations for the CalYTD, FiscYTD, PrevTD and Proj.TD measure columns.
5. Click the **Update Measure Target Status** button to update the target status in the newly created data rows.

Update measure target status

The Update Measure Target Status utility automatically updates MeetsTarget column entries for all measure data, based on the MeetsTargetDirection values set for each measure.

When you update measure data in the Web Client, the measure target status is automatically updated as well. However, if you manually update measure data directly in a hierarchy data table—for example, the PerspectiveMeasureData table—you would also need to manually update the MeetsTarget column in that table for the updated data.

NOTE: Updating measures manually in the data tables is not the recommended best practice, but in some cases may be unavoidable.

Run the Update Measure Target Status utility Instead of updating target status manually. You can even use the Axiom Scheduler (job: UpdateMeasureTarget-SQL) to automatically run this utility at set times, to ensure the measure data tables stay accurate. This is particularly useful if your organization has a number of people manually updating measure data in the Desktop Client.

NOTE: This utility should not be needed when you update measure data in the Web Client's Measure Update Form, or when Initiative owners update measure data in Initiative plan files.

About the Update Measure Target Status utility

The utility compares the current measure data to the set measure target and determines if the measure data meets the target. If it meets the target or surpasses it in a favorable direction, the utility enters "TRUE" into the MeetsTarget column for that measure data. If the measure data does not meet the target, the utility enters "False" into the MeetsTarget column.

In the following example, the data in the Value column matches the data in the Target column. This means that the MeetsTarget column should be "TRUE" for the measure, but the entry is "FALSE." Running the utility will change this to "TRUE."

	B	D	E	F	G	H	I	J	K	L	M	
4	***Data Type***	*Integer*	*Integer*	*Integer*	*Integer*	*Integer 32*	*Numeric*	*Numeric*	*Numeric*	*Boolean*	*String*	
5	***String Length***										*500*	
6	**Description**	Perspective	Measure	Department	Entity	YRMO	Value	Target	Score		Comment	Clien Benc by m
8	Delete Row	**Perspective**	**Measure**	**Dept**	**Entity**	**YRMO**	**Value**	**Target**	**Score**	**MeetsTarget**	**Comment**	**Be**
69		2	866	0	0	201801	54.83	50.00	0.00	TRUE		
70		2	866	0	0	201802	49.92	50.00	0.00	FALSE		
71		2	866	0	0	201803	47.00	50.00	0.00	FALSE		
72		2	866	0	0	201804	47.56	50.00	0.00	FALSE		
73		2	866	0	0	201805	46.52	50.00	0.00	FALSE		
74		2	866	0	0	201806	49.00	50.00	0.00	FALSE		
75		2	866	0	0	201807	50.00	50.00	0.00	FALSE		
76		2	866	0	0	201808	0.00	50.00	0.00	FALSE		
77		2	866	0	0	201809	0.00	50.00	0.00	FALSE		
78		2	866	0	0	201810	0.00	50.00	0.00	FALSE		
79		2	866	0	0	201811	0.00	50.00	0.00	FALSE		
80		2	866	0	0	201812	0.00	50.00	0.00	FALSE		
81		2	878	0	0	201701	95.67	75.00	0.00	TRUE		

PerspectiveMeasureData

PerspectiveMeasureData table showing incorrect entry (FALSE) in the MeetsTarget column for the example measurement.

When to run the utility:

- When anyone updates measure data directly in a hierarchy measure data table
- After running the Create Measure Data utility

To update measure target status:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. In the **Maintenance** page, click the **Data Utilities** tab.
3. Click the **Update Measure Target Status** button.

Update period measure summary data

This utility updates period measure data values, target values, and benchmark values when present.

This utility is also for clients who create and manage a specific class of initiatives focused on cost reduction or revenue enhancement. For these Initiatives, you enter savings achieved each period. The period savings represent the amount of dollars saved or paid hours reduced in an individual period. These savings appear in the Cost Reduction Status report. To make Initiative measure data that you enter in the Update Measures page or the InitiativeMeasureData table available in the Cost Reduction Status report, you must run the Update Period Measure Data utility after these Initiative measures are updated.

About the Update Period Measure Data utility

When you update cost reduction or revenue enhancement measure data in the Strategy Management Initiative measure data table for an Initiative measure, you must also run the Update Period Measure Data utility to update the calculated summary columns. You can even use the Axiom Scheduler (job UpdateMeasureData-SQL) to automatically run this utility at set times to ensure the calculated data in the summary columns in the InitiativeMeasureData table stays accurate. The job is particularly useful if your organization has a number of people manually updating cost reduction or revenue enhancement measure data.

This utility calculates summary columns in the data tables that sum up the rolling totals by calendar year and by fiscal year, and also sums up the rolling total from the start of each initiative. There is also a summary calculation that stores the prior period savings. The summary columns are reportable.

When to run the utility:

- After running the Create Measure Data utility for imported Initiatives with measures from the PI-Dollars-Performance Improvement class
- After running the Create Measure Data utility for Initiatives with cost-saving measure data updated from the Admin Measure Update page
- After running the Create Measure Data utility for a new Perspective measure or Objective measure

To update period measure data:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. In the **Maintenance** page, click the **Data Utilities** tab.
3. Click the **Update Period Measure Data** button.

Delete orphaned measure data

The Delete Orphan Measure Data utility removes orphaned data records that result from changes to the hierarchy measure tables. Axiom Strategy Management administrators can use this utility to clean up unused data and ensure that deleted measure targets do not appear in reports.

When a hierarchy measure is first set up, the system creates individual rows in the respective <hierarchy>MeasureData table for each time period (frequency: month, quarter, half-year, or year) in the measure's active period. This active period includes future dates with set targets. If that time period is shortened, the record would have a set target for those future periods but no Actuals, which could result in reporting errors.

When to run the utility:

- Ad-hoc – After a hierarchy measure (Perspective, Objective, Initiative) has had its active period shortened from the original. For example, if your organization was tracking patient falls through the end of 2020 but now wants to change the end date to December 31, 2019.
- Scheduled – Can be set up as a Scheduler job to run at set times to ensure removal of orphaned Initiative measure data.

To remove orphaned measure data:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. In the **Maintenance** page, click the **Data Utilities** tab.
3. Click the **Delete Orphan Measure Data** button.

Update imported measure data actuals

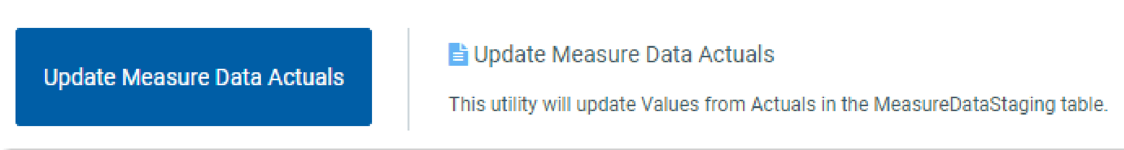
For clients who have configured their systems to import actuals from other sources such as other Axiom Software products or external data feeds, Axiom Strategy Management administrators have a utility that updates measure data from these sources.

The Update Measure Data Actuals utility runs automatically on a set basis (the default is 12:59 AM Pacific time) to pull actuals from imported measure data stored in the staging table (MeasureDataStaging) in the Axiom Strategy Management system. The utility updates the measure data tables with the data and then clears the staging table. Any data that does not match measures already in the system (matches are performed on MeasureID, Dept, Entity, and YRMO) is moved to the MeasureDataExceptions table, where administrators can view it using the Resolve Exceptions utility.

Administrators can also run the Update Measure Data Actuals utility on an ad hoc basis.

To run the utility:

1. In the **Navigation** pane, click **Admin** > **Maintenance**.
2. In the **Maintenance** page, click the **Data Utilities** tab.
3. On the Data Utilities page, click the **Update Measure Data Actuals** button.



A note at the bottom of the page displays, confirming that the records have been updated from the Staging table.

Resolve imported measure data exceptions

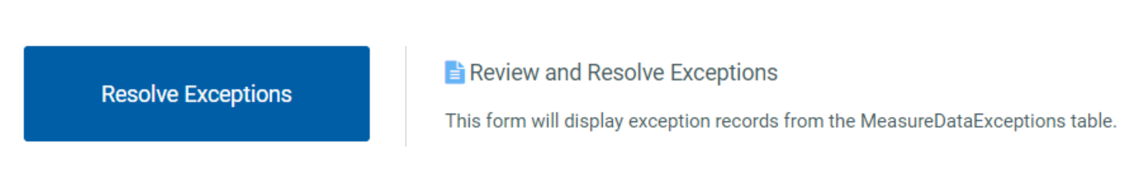
Use these instructions for resolving data mismatches that occur when measure actuals are imported to the system.

Measure data imported to the Axiom Strategy Management system is matched by measureID, Dept, Entity, and YRMO. If one or more of these items does not match any hierarchy measure already in the system, the incoming data is moved to the MeasureDataExceptions table. For example, if actuals for a given Objective measure come in with an entity listed that is different from the entity listed in the Objective measure in the system, that mismatch produces a data exception.

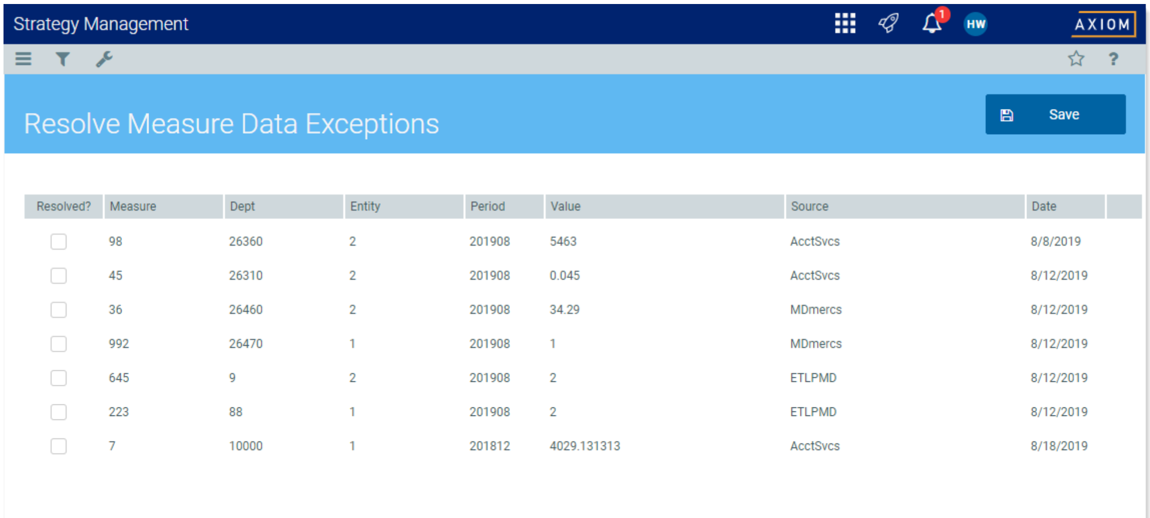
Administrators can run the Resolve Exceptions utility to produce a report that lists the mismatched data.

To resolve data mismatches:

1. In the **Navigation** panel, click **Admin** > **Maintenance**.
2. On the **Maintenance** page, click the **Data Utilities** tab.
3. In the list of utility buttons, click the **Resolve Exceptions** button.



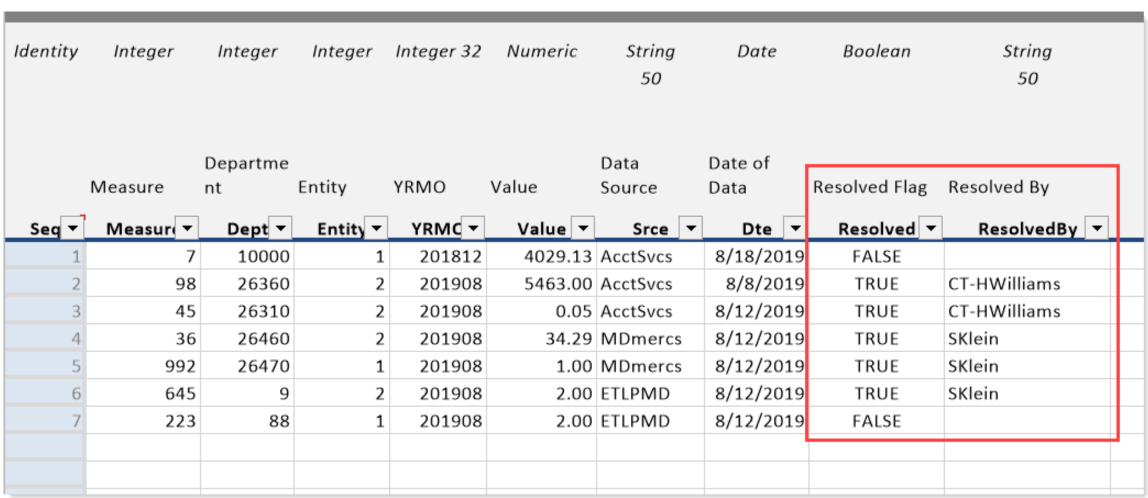
The Resolve Measure Data Exceptions report opens, displaying a list of exceptions found .



Resolved?	Measure	Dept	Entity	Period	Value	Source	Date
☐	98	26360	2	201908	5463	AcctSvcs	8/8/2019
☐	45	26310	2	201908	0.045	AcctSvcs	8/12/2019
☐	36	26460	2	201908	34.29	MDmercs	8/12/2019
☐	992	26470	1	201908	1	MDmercs	8/12/2019
☐	645	9	2	201908	2	ETLPMD	8/12/2019
☐	223	88	1	201908	2	ETLPMD	8/12/2019
☐	7	10000	1	201812	4029.131313	AcctSvcs	8/18/2019

4. For each item, determine the type of error and take the appropriate action:
   - If an item is missing from the system, add it to the system if it makes sense to do so.
   - If a data item is wrong, it will need to be corrected in the originating source or removed from the import.
5. After resolving a listed item, to remove it from the list, in the **Resolved?** column, click the corresponding check box and then click **Save**.

   The item is removed from the list. In the MeasureDataExceptions table, corrected items are flagged as TRUE for Resolved. The user who cleared the item from the Resolved Measure Data Exceptions report is listed in the ResolvedBy column:



Identity	*Integer*	*Integer*	*Integer*	*Integer 32*	*Numeric*	*String 50*	*Date*	*Boolean*	*String 50*
	Measure	Department	Entity	YRMO	Value	Data Source	Date of Data	Resolved Flag	Resolved By
Seq	**Measure**	**Dept**	**Entity**	**YRMO**	**Value**	**Srce**	**Dte**	**Resolved**	**ResolvedBy**
1	7	10000	1	201812	4029.13	AcctSvcs	8/18/2019	FALSE	
2	98	26360	2	201908	5463.00	AcctSvcs	8/8/2019	TRUE	CT-HWilliams
3	45	26310	2	201908	0.05	AcctSvcs	8/12/2019	TRUE	CT-HWilliams
4	36	26460	2	201908	34.29	MDmercs	8/12/2019	TRUE	SKlein
5	992	26470	1	201908	1.00	MDmercs	8/12/2019	TRUE	SKlein
6	645	9	2	201908	2.00	ETLPMD	8/12/2019	TRUE	SKlein
7	223	88	1	201908	2.00	ETLPMD	8/12/2019	FALSE	

The data in the MeasureDataExceptions table remains until the table is cleared and populated with new data during the next import.

6

Administering Security

The Axiom Strategy Management system administrator manages security in the Axiom Strategy Management subsystem. To manage security, the system administrator needs to have the Security Admin role.

NOTE: Currently, system administrators need to add users and assign user roles by accessing the Security Management window from the Desktop Client.

Security is integrated at all levels of Axiom Strategy Management, meaning that no matter where you are in the system, you can only view data and use features for which you have the appropriate access.

Security in the Axiom Strategy Management is based on the following:

- **Logon** – Allows users to log on to the system.
- **Subsystem** – Gives users access to one or more Axiom Healthcare Suite products licensed by your organization.
- **Role** – Determines which assets you have access to. Assets include icons, tools, report, utilities, task panes, and so on. Users may have multiple roles. For example, a user might be an administrator for Axiom Strategy Management but an end-user for another Axiom product.
- **Filter** – Restricts the data that you can view for each asset. For example, you may have access to a specific report, but the report may only display specific information based on department. Typically, you are restricted to your specific department or entity while administrators have broader access.

About user roles

All user roles in Axiom Strategy Management, except the Strategy Management Administrator role, are additive, which means you can assign a user multiple roles as needed, with each assigned role adding rights. You can assign users as many roles as necessary to do their work, but the best practice is to add no more rights than the user needs. The starting role for everyone but administrators is the Strategy Management User role, which you assign to each new user as you add them to the Axiom Strategy Management subsystem.

Axiom Everyone

This role provides access to the Axiom platform functions with which Axiom Strategy Management is integrated. All Axiom Strategy Management users are given this role by default when you add them to Axiom Strategy Management if they do not already have this role from having access to another Axiom product. This role cannot be configured by the Axiom Strategy Management Admin.

Strategy Management User

This is the baseline role in Axiom Strategy Management. All users except Strategy Management administrators are assigned this role; it provides access to general navigation and core functionality within the Web Client. This role is preconfigured and should not require additional configuration after the initial system is set up. The following tabs refer to those in the Security Management dialog accessible from the Excel or Windows Client. Baseline access includes:

Tab	Access to
Permissions	None
File Groups	Can query Strategy Management – Requests
Tables	SMReference – Full Read access on all tables except Initiative, unless the user is the designated owner or sponsor for an Initiative; in which case, the user has access to only those Initiatives for which they are owner or sponsor.

Tab	Access to

Files	Reports Library > Strategy Management Utilities > Home Pages
	• Dashboard – Read only
	  ◦ Can drill down to view details on Perspectives and Perspective measures, including measure data and KPI icons
	  ◦ Can view list of Objectives but not view performance data or KPI icons, unless the user owns the Objective
	• Perspectives – Read only
	  ◦ Can see all enabled Perspectives
	  ◦ Can drill down to view Perspective measure details but not related Objective measures
	  ◦ Cannot see Baseline, Prior, Current, or Target information for related Objective measures unless the user owns the related Objective
	• Objectives – Read only
	  ◦ Cannot view Objective measure data or KPI icons unless the user owns the Objective
	  ◦ Cannot drill down to details unless the user owns the Objective
	  ◦ Cannot view associated Initiatives unless the user is the owner or sponsor for the Initiative
	• Initiatives – Read only
	  ◦ Additional Initiative role required to see Initiative names and Initiative data, except for Initiatives the user owns or sponsors
	• Admin pages – No access

Strategy Management Executive

This role adds the following access rights to the Strategy Management User role:

- Provides full read access to Objectives, Initiatives, and measures information.
- File Groups tab – Adds Read Only access to all plan files
- Tables tab > SMReference
  - Adds full Read access to the Initiative table

Strategy Management Initiative Creator

This role adds the ability to create Initiatives and submit them for review and approval using the Initiative Approval Process Management workflow. Only users with this role can create Initiatives in the Web Client. System administrators cannot create Initiatives in the Web Client without the Initiative Creator role. System administrators can add Initiatives in the Excel or Windows clients using the import Initiatives utility.

NOTE: This role requires the user to have either the Strategy Management User role or the Strategy Management Admin role.

Strategy Management Initiative Owner

This is not strictly a “user role” because it is not managed in the system security settings, it is assigned by the Initiative creator when they create the Initiative. This adjunct role enables the user to review and modify an Initiative when it is in the Owner Review stage of the Initiative creation approval process, to update an Initiative’s measure data and milestone status when the Initiative is in the Active Tracking stage of the Initiative update approval process, and to approve an Initiative as Complete in the Pending Reset stage of the Initiative completion process. An Initiative owner can also abort an Initiative at the Active Tracking step in the Initiative creation approval process and the Initiative update approval process.

NOTE: Users can only be assigned this role if they already have the Strategy Management User role.

Strategy Management Initiative Sponsor

This is not strictly a “user role” because it is not managed in the system security settings, it is assigned by the Initiative creator when they create the Initiative. This adjunct role enables the user to review and modify an Initiative when it is in the Sponsor Review stage of the Initiative creation approval process. This role also enables the user to review and approve Initiative measure data in the Active Review stage of the Initiative update approval process.

NOTE: Users can only be assigned this role if they already have the Strategy Management User role.

Strategy Management Initiative Approver

This role enables the user to approve Initiatives into the Active Tracking stage of the Initiative Approval Process Management workflow, or to reject or abort Initiatives. This role also enables the user to view comments and submission history for Initiatives.

NOTE: Users can only be assigned this role if they already have the Strategy Management User role.

This user role adds the following rights:

Tab	Access to
File	• Dashboard – Read only ◦ Can see Subscribed Initiatives in list ◦ Can access Initiatives approval process task page • Perspectives – Read only ◦ Can see all Initiatives related to each Objective and can click to access Initiative-related pages • Objectives – Read only ◦ Can see all Initiative information and click to access Initiative-related pages (but still cannot see Objective measure data unless user is Objective owner) • Initiatives – Read only ◦ Can see all Initiative names and Initiative summary data ◦ Cannot create an Initiative ◦ Can click to go to Initiative plan file page, approval process routing page

Strategy Management Admin

This role grants the user master system user access, including access to all Axiom Strategy Management tools and tables from the Excel or Windows Client. This role does not require the Strategy Management User role be assigned in addition. This role does not provide the ability to assign roles to users.

Tab	Access to
Permissions	• Administer announcements • Administer Axiom Explorer • Administer tables • Scheduled jobs user (can use Scheduler in Desktop Client for the following jobs: SM_CreatePlanFiles, UpdateMeasureData-SQL, and UpdateMeasureTarget-SQL)
File Groups	Can query Strategy Management – Requests • Create Plan Files (in the Excel and Windows clients) • Create new records • Run Axiom Queries
Tables	SMReference – Full access Data – Full access

Tab	Access to
Files	Reports Library > Strategy Management Utilities > Home Pages • Objectives – Full Read access • Initiatives – Full Read access • Admin pages – Full access

Security Admin

This role grants the user the ability to add users to the Axiom Axiom subsystem and to assign other Strategy Management roles.

- Permissions tab
  - Administer Security – Security Management utility for managing users, user roles, and access to the Axiom Strategy Management subsystem

Add a user

Use these instructions to add a user to Axiom Strategy Management. Every user is first assigned the Strategy Management User role unless that user is assigned the Strategy Management Administrator role.

> **NOTE:** You must have the Security Admin role to be able to access the Security Manager and assign roles to users.

To add a user to Axiom Strategy Management:

1. Launch the Desktop Client.
2. In the **Ribbon**, click the **MAIN** tab.
3. In the **Security** section, click **Security Manager**.
4. In the top left corner of the **Security Management** dialog, click **Users**.
5. At the bottom left of the dialog below the list of users, click the **Create user** plus (+) icon.
6. In the **User Details** section of the **General** tab, add the user's information. For information, go to the Axiom Desktop Client help and search on "defining user properties."
7. At the bottom right of the **Security Management** dialog, click **Apply**.

   > **NOTE:** You cannot assign roles or a subsystem to the user until you click Apply.

8. In the **Assigned Roles** section, click the **Add** plus (+) icon.
9. In the **Assign Roles** dialog:

a. Scroll to the bottom of the **Available Roles** column and click **Strategy Management User**.

b. Click **Add** to move the role to the **Assigned Roles** column.

c. Click **OK**.

10. In the **Assigned Subsystems** section, click the **Add** plus (+) icon.

11. In the **Available Subsystems** column of the Assign Subsystems dialog:

    a. Click **Strategy Management**.

    b. Click **Add** to move it to the **Assigned Subsystems** column.

    c. Click **OK**.

12. Click **Apply**.

13. Click **OK**.

Assign roles to users

You can assign roles to a user at any time after adding the user to the Axiom Strategy Management subsystem and giving them the Strategy Management User Role in the Security Management utility.

These instructions assume that the user already has the Security Management User role and has been added to the subsystem.

NOTE: You must have the Security Admin role to be able to assign roles to users.

To assign roles to a user:

1. Launch the Desktop Client.

2. In the **Ribbon**, click the **MAIN** tab.

3. In the **Security** section, click **Security Manager**.

4. In the top left corner of the **Security Management** dialog, click **Users**.

5. Locate and select the user in the list of names.

   NOTE: If the list is long, you can clear the **Disabled** check box to view only active users, or you can type the user's name in the search field above the list.

6. In the **Assigned Roles** section of the **General** tab, click the **Add** plus (+) icon.

7. In the **Assign Roles** dialog:

    a. Scroll to the bottom of the **Available Roles** column and select the desired role.

    b. Click **Add** to move the role to the **Assigned Roles** column.

c. Repeat until you have added all the desired roles for the user.

d. Click **OK**

8. Click **Apply**.
9. Click **OK**.

A

Reference

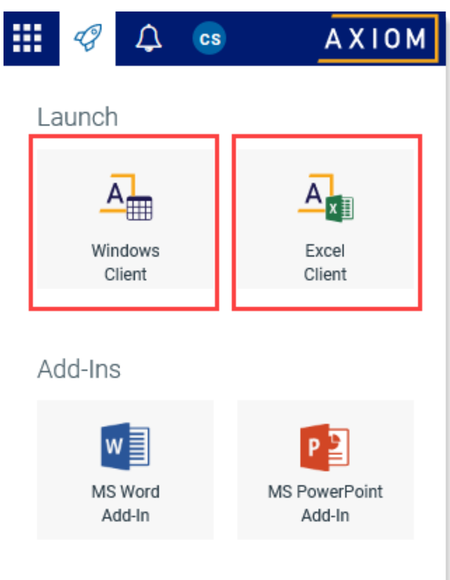
This appendix contains reference information for administrators configuring and maintaining Axiom Axiom.

Launch the Desktop (Excel or Windows) Client

Use the following instructions to launch either the Windows Client or the Excel Client from Axiom Strategy Management.

To launch one of the spreadsheet clients:

1. In the Global Navigation bar (blue bar at top of page), click the Quick Launch icon ().
2. In the **Quick Launch** menu, click the desired Desktop Client (Windows or Excel).

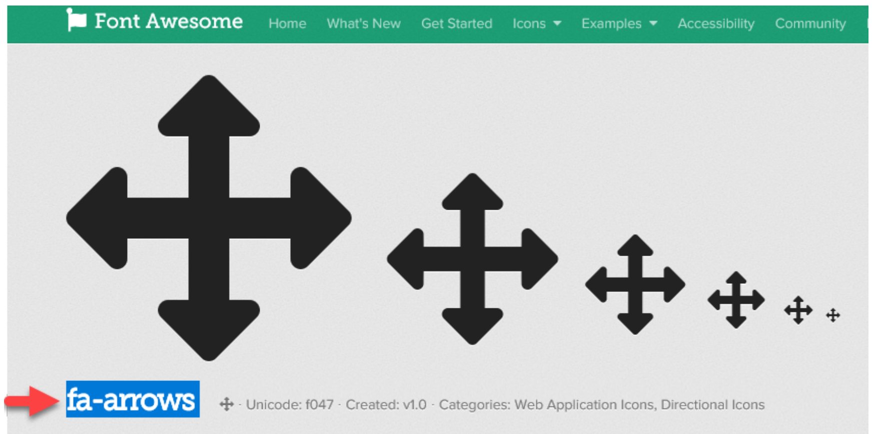


The application launches.

Get Perspective icons

Axiom Strategy Management uses free icons from Font Awesome. Only icon names from Font Awesome will work.

1. Go to Font Awesome and search for the icon you want or review the available lists.
2. Locate the desired icon in the list and click it. A new page opens for that icon. The code for the icon displays below a picture of the icon.
3. Use your cursor to highlight just the code, as shown in the following example.



4. Right-click the highlighted name, and select **Copy**.
5. In Axiom Strategy Management, navigate to the desired **Icon** field, place your cursor in the field, right-click and select **Paste**.
6. Click **Save**.

About measures

Axiom Strategy Management uses data collectors called *measures* to determine how the items in the strategy hierarchy—Perspectives, Objectives, and Initiatives—are performing currently and over time.

Each measure captures specific data. For example, if an Objective is to improve patient access to care, you could assign a measure that records the average time it takes for a patient to schedule a primary care visit.

Measure data is updated on a regular schedule according to the measure's frequency; the default is monthly. The system administrator updates Perspective and Objective measure data. Initiative measure data is typically updated by the Initiative owner, or an administrator can also update them if needed.

Each measure has some or all of the following attributes:

- **Description** – Measure name
- **GL Acct** – General Ledger account in which the measure belongs
- **Precision** – The number of decimal values that display for units when the system displays measure data in Measure Detail windows
- **Class** – Category in which the measure belongs
- **Type** – Method used for updating the measure
- **Unit** – Format type of the data the measure produces (i.e., *amount* for currencies, *percent* for percentages, *number* for other numeric data)
- **Frequency** – How often the measure data is updated and reported
- **Formula Description** – Optional. How the measure data is derived, if applicable
- **User Drill** – Optional. Indicates the measure has an associated drill document
- **Enabled / Disabled** – Whether or not the measure is available to be selected for hierarchy items (Perspectives, Objectives, and Initiatives)
- **MeetsTargetDirection** – Direction of the measured data (higher or lower) that is favorable when the data is compared to the set target

When measures are assigned to Perspectives, Objectives, or Initiatives, they receive the following additional attributes:

- **Baseline** – Starting point at which data measurements begin. This can be from the current year or a historical average for the past 12 months.
- **Target** – The number used as a comparison point against which measure data is compared to determine if the data is favorable or unfavorable. The person assigning the measure to a Perspective, Objective, or Initiative, sets the target. The target typically comes from either a benchmarked or budgeted number.
- **Period Begin** – (Called Start Date in Initiative measures) The starting date for which measure data is collected and recorded. This date typically coincides with the start date of the Initiative.

- **Period End** – (Called End Date in Initiative measures) The date measurement data stops being collected and recorded.
- **Department** – Optional. The department from which the measure data is taken
- **Entity** – Optional. If a department is selected, then the entity is the higher-level section of the organization (e.g., location, building), or the organization itself, that the department belongs to. If no department is specified, then the entity is the part of the organization or the entire organization from which the measure data is taken.

About Key Performance Indicator icons

Axiom Strategy Management displays Key Performance Indicator (KPI) icons to represent current status as compared with set targets and to show period-over-period trends. KPIs use measurements of active data to reflect whether the hierarchy item they apply to is performing favorably, unfavorably, or a mix of both, as compared to the target set in the item's measure.

How the system determines KPI icon use

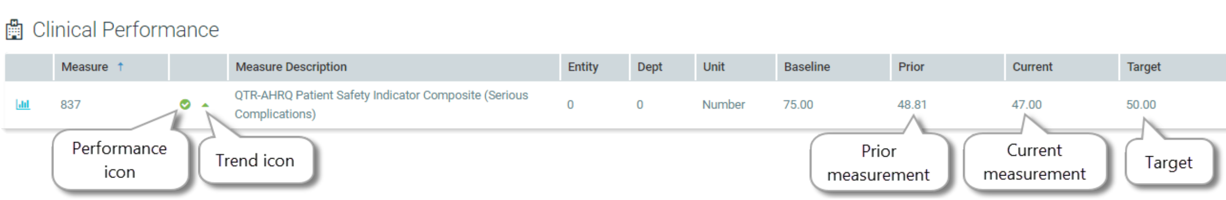
The system displays KPI icons to provide at-a-glance performance status for Perspectives, Objectives, and Initiatives. Perspective and Objective KPIs reflect their measure data. Initiatives are different in that their KPI icons represent the status of their milestones. For more information, see About Initiative milestones.

KPI icons represent a value judgment of whether the data measured is favorable or unfavorable compared to the target set in the measure when the measure is applied to a Perspective or Objective.

Measured data can be higher than, lower than, or right on the target. Whether data above the target or below the target is favorable or unfavorable depends on what is being measured. For example, when measuring profitability, data above the target is favorable. However, if the measure tracks the number of patient falls, then your target would be the maximum number of falls considered acceptable in a period, and a number at or below the target would be favorable. The direction of the data—above or below the target—that is favorable, is called the *MeetsTargetDirection* attribute. The MeetsTargetDirection attribute is defined when the measure is created.

In the following example, a Perspective measure tracks the AHRQ Patient Safety Indicator Composite for serious complications. For this measure, the MeetsTargetDirection is set to Lower. The target is set to the number 50. The current measurement is 47, which is lower than the set target, so the current measurement is favorable. The icon used to represent the measure's current performance is called a *performance* icon. In this case, because the performance is favorable, the icon used is a check mark in a green circle.

Notice that the current measurement is lower than the prior measurement, which indicates improved performance over time. In Axiom Strategy Management, performance over time is called *trend*. When data is moving in a favorable direction from the previous measurement, the trend is favorable, which is represented by a green, up arrow icon.



Icons and icon colors indicate status: a check mark indicates favorable, an exclamation mark indicates unfavorable. Green represents favorable data, and red represents unfavorable data. Orange indicates the status is a mixture of favorable and unfavorable data if the icon is a performance icon. For a trend icon, orange indicates the trend is flat, meaning it is moving neither favorably nor unfavorably as compared to the previous frequency period measurement.

The following example of the list of Objectives from the Dashboard page displays each Objective's KPI and trend icons.

For detailed descriptions of each icon used in the system, see the following tables.

Key Performance Indicator icons

Axiom Strategy Management uses two kinds of KPI icons: performance and trend. Performance icons come in two types: single-measure and roll-up measure. Single-measure icons reflect the status of a single measure, whereas roll-up measure icons reflect a combination of two or more measures.

Performance icons for hierarchy measures

This table lists the performance icons used for Perspective, Objective, and Initiative measures. Performance icons represent the status of measurements for a single frequency period.

Icon	Meaning
	This icon indicates the hierarchy item’s measure is performing favorably compared to the set target. The system displays this icon to represent the performance of a single measurement or multiple measurements that are performing favorably.
	This roll-up icon indicates that the hierarchy item’s measure performance is a mix of favorable and unfavorable measurements compared to the set target. This icon always represents a roll-up measurement. This icon also always represents a mix of favorable and unfavorable measurements for the item being measured, regardless of how many of the measurements are favorable or unfavorable. For example, if a Perspective has four measures and three of them are favorable and one is unfavorable, this performance icon is used; likewise, if three of the measures are unfavorable and one is favorable.
	This icon indicates that the item is performing unfavorably compared to the target. The system displays this icon to represent the performance of a single measurement or multiple measurements that are all performing unfavorably.
	This icon indicates that either no data is available for the item or that you do not have permissions to view that data.

Trend icons for hierarchy measures

Trending is determined by comparing the measure value of the current frequency period to the previous frequency period. In the case of roll-up measures, this is evaluated by comparing the previous period performance (i.e. green, red, orange) to the current period performance. Trend icons apply only to measure data performance, not Initiative milestone performance.

Icon	Meaning
	The item is trending favorably. This means the performance is headed in a favorable direction compared to the previous measurement.

Icon	Meaning
	The item is trending flat. This means the performance is trending neither favorably nor unfavorably compared to the previous measurement.
	The item is trending unfavorably. This means the performance is headed in an unfavorable direction compared to the previous measurement.
	The item contains no data, or you do not have permissions to view the data.

Icon combinations

The following table lists the possible performance-trend icon combinations and their meaning.

Icon set	Meaning
	Performance is favorable compared to the target, and trending favorably compared to the previous measurement.
	Performance is favorable compared to the target, and trending flat, neither up nor down, compared to the previous measurement.
	Performance is currently favorable compared to the target, but trending unfavorably.
	Performance is a mixture of favorable and unfavorable measurements compared to the target, and is trending favorably compared to the previous measurement.
	Performance is a mixture of favorable and unfavorable measurements compared to the target, and is trending flat compared to the previous measurement.
	Performance is a mixture of favorable and unfavorable measurements compared to the target, and is trending unfavorably compared to the previous measurement.
	Performance is unfavorable compared to the target, and trending favorably compared to the previous measurement.
	Performance is unfavorable compared to the target, and trending flat compared to the previous measurement.
	Performance is unfavorable compared to the target, and trending unfavorably compared to the previous measurement.
	There is no performance or trend data available for the item, or you do not have permissions to view the data.

About Initiative milestones

When creating an Initiative, users can set milestones to track the life cycle of the Initiative. Milestones provide a way to ensure that the Initiative project gets launched on time, that work gets done according to schedule, and that Initiatives are completed on time. Milestones are tracked monthly.

Unlike Perspectives and Objectives, Initiatives do not have begin and end dates; instead, an Initiative's life cycle begins at creation and ends when all of its milestones are complete and the Initiative no longer needs to collect measure data. However, since an Initiative supports an Objective, the Initiative's milestone time frames need to fall within the associated Objective's Period Begin and Period End dates. To ensure this happens, each newly-created Initiative comes with two built-in milestones:

- Initiative Kickoff – Uses the current date as the milestone's start date.
- Initiative Completion – Uses the last day of the month of the Period End date of the associated Objective as the milestone's start and end dates. For example, if the Objective Period End date is June 2021, the Initiative Completion milestone dates will be June 30, 2021.

> **NOTE:** The system only displays Objective dates on the Admin Maintenance page to system administrators.

Before submitting the Initiative for approval, if you delete both of these Initiatives without adding any others, save the file and then go back to the plan file page, the default Initiatives will be restored. (However, if the milestones are deleted during the owner or sponsor review stages, the Initiatives are not restored.) This is a safeguard to prevent creating Initiatives with no milestones. While you can save an Initiative without milestones, the best practice recommendation is to have at least one Milestone per Initiative. This is especially important because **Initiative status is derived from milestone status**. You do not have to add all the milestones before submitting the Initiative for approval; the Initiative owner or sponsor can add milestones before the Initiative is approved to active tracking.

After the Initiative has been approved to the Active Tracking stage, Initiative owners and sponsors can update the status of milestones.

Milestone status

When the system displays an overall Status for an Initiative on the Initiatives page, it uses the most recent status of the Initiative's milestones. However, the milestone status displayed in the Status column on the Initiatives page is not an aggregation of the Initiative's milestones; rather, the system checks the status of all the Initiative's milestones and if there is a problem with any of them, the system displays the status that is the most urgent.

For example, if any milestones have the status of Needs Attention, then this is the status that displays in the Status column, even if the other milestones are On Track or Completed. However, if another one of the Initiative's milestones has the status At Risk, then this is the status that displays because At Risk is a higher level of urgency than Needs Attention. This feature allows you to see immediately which Initiatives need help to get back on track.

Milestone status icons

Initiative milestone status is represented using KPI icons but no trend icons. When the dash icon ( ) is used to represent milestone status, it indicates that there is no milestone data. No milestone data usually indicates that the Initiative has not reached the Active Tracking stage in the Initiative creation approval process.

ID		Status	Initiative Name	Owner	Sponsor	Stage	Objective
1		At Risk	Implement Nursing Productivity Standards	tmckinlay	jseargent	Active Tracking	Effectively Manage Labor Cost and Productivity in-line with Industry Best Practice
2		On Track	Reduce ED wait time - door to Dr.	CSparks	jseargent	Active Review	ED Wait Time Reduction, Improve Patient Flow
3		On Track	Increase number of Primary Care providers	HBurns	CCredit	Pending Reset	Grow Primary Care Market Share 10%
4		Needs Attention	Reduce syringe costs (CM)	SDrew	jseargent	Active Tracking	Manage Cost Structure in-line with Financial Plan Targets
5		On Track	Reduce implant costs	HBurns	CCredit	Pending Reset	Manage Cost Structure in-line with Financial Plan Targets
6		On Track	Improve productivity analytics	HBurns	CCredit	Pending Reset	Earn Industry Leading Patient Satisfaction & Experience Scores
7		On Track	Nursing Labor Optimization (CM)	CSparks	jseargent	Active Review	Effectively Manage Labor Cost and Productivity in-line with Industry Best Practice
8		On Track	Nursing working to top of license	CSparks	jseargent	Active Review	Earn Industry Leading Patient Satisfaction & Experience Scores
9		On Track	Phase 2 ED Triage Program	SKlein	jseargent	Active Tracking	ED Wait Time Reduction, Improve Patient Flow