



## Release Notes

Axiom Comparative Analytics  
Version 2020.2



KaufmanHall

AXIOM

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# About the Release Notes

Kaufman Hall is pleased to announce the 2020.2 release of Axiom Comparative Analytics. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

The purpose of these release notes is to provide you with the following:

- High-level descriptions of new features
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

**TIP:** Periodically, the release notes are updated when new information is available, including patch release fixes. To view the latest release notes, we encourage you to view them in the Axiom Comparative Analytics online help. On the help home page, simply click the Release Notes link at the top of the page.

# New features in 2020.2

Axiom Comparative Analytics 2020.2 delivers expanded innovations across the entire Customer 360 platform, empowering you to get a single shared view of your customers and deliver more moments that matter.

## Dashboard conversion to Axiom Intelligence

The Entity Performance, Data Explorer, and Peer Explorer dashboards have been converted to the Axiom Intelligence platform resulting in an improved user experience.

## Axiom Intelligence Update

Administrative function used when changes are made to Dept Dimension assignments (owner/reviewer/approver), peer group priority, or loaded data on a day other than the 23rd of the month, this feature allows you update Axiom Intelligence data used for the Axiom Intelligence dashboards without waiting for the nightly scheduled job.

## Security enhancements

Users who are only interested in department level data will have a more streamline homepage to deliver information that they care most about in the Expense Improvement Opportunity Dashboard, the Detailed Department Report, and the Metric Explorer. This role can be layered with other roles to provide access to additional Axiom Comparative Analytics dashboards.

## Update peer group priority

This feature is a configurable option that allows you more control of the end user experience. The system administrator can assign a primary peer group that displays automatically for each entity or department. That peer group will display automatically in select dashboards whenever the data of that entity or department is displayed.

# Dashboard conversion to Axiom Intelligence

## ► Why use this feature

The Entity Performance, Expense Improvement, Data Explorer, and Peer Explorer dashboards have been converted to the Axiom Intelligence platform resulting in an improved user experience. The Axiom Intelligence platform provides you with powerful visualization and drill-through tools so that you can see the big-picture performance information as well as the granular detail support it. These dashboards are designed to present data in a way that is informative and useful.

### ▶ How this feature works

Each dashboard is accessible from the homepage. Each dashboard varies in specific functionality, but provides an improved user experience and the ability to filter without clicking in the toolbar.

**Where:** The Entity Performance, Data Explorer, and Peer Explorer dashboards.

**Who:** Access to the dashboards is limited based on role. Depending on the dashboard, users need a Department and/or Entity role.

**How:** Access any dashboard from the Navigation menu or the Comparative Analytics homepage.

### ▶ Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Entity Performance"
- "Detailed Department Report"
- "Metric Explorer"

## Update Axiom Intelligence data

### ▶ Why use this feature

This is an administrative function used when changes are made to Dept Dimension assignments (owner/reviewer/approver), peer group priority or loaded data on a day other than the 23rd of the month, this feature allows you update Axiom Intelligence data used for the Axiom Intelligence dashboards without waiting for the nightly scheduled job.

### ▶ How this feature works

Execute this process by clicking an icon on the Comparative Analytics homepage.

**Where:** The Axiom Intelligence Data Update function is accessible on the Axiom Comparative Analytics homepage.

**Who:** Users with a Comparative Analytics Admin role.

**How:** On the Axiom Comparative Analytics homepage, click **Axiom Intelligence Data Update**. In the **Warning** dialog that displays, click **Yes**.

► Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Updating Axiom Intelligence data"

## Security enhancements

► Why use this feature

We narrowed the role-based security definitions that allow users to have quicker access to only the data relevant to their organizational role. Further, these enhancements allow you to apply bulk security settings to users of Axiom Intelligence dashboards as these dashboards do not support legacy security protocols that apply to other Comparative Analytics assets.

► How this feature works

Security changes for this release include:

- Dashboards and utilities on the homepage are only accessible if your role has access to them. If your role does not have access to a dashboard or utility, it will display in a lighter color.
- Users with only the Department role now only have access to the Expense Improvement Opportunity Dashboard, the Detailed Department Report, and the Metric Explorer. This role can be layered with other roles to provide access to additional Axiom Comparative Analytics dashboards.

**NOTE:** Users with both a Department and Entity role will have access to the Data Explorer including Jobcode and Salary data relevant to their assigned DEPT filter.

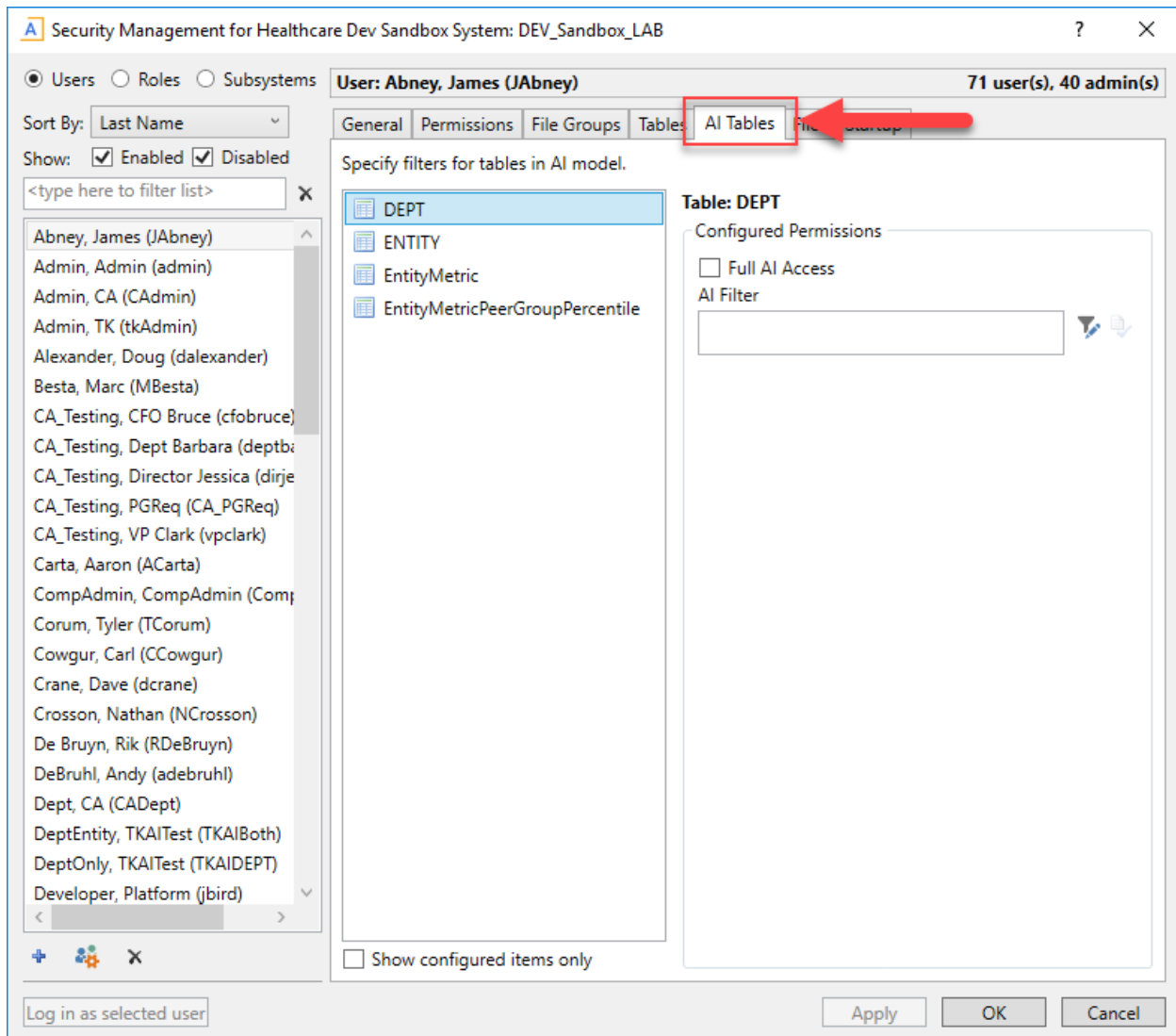
- For dashboards converted to Axiom Intelligence, administrators must set up any desired custom filters using the **AI Tables** tab of the **Security Manager**.

**Where:** User roles are assigned in the Comparative Analytics Security Update utility.

**Who:** Users with a Security role can add/remove roles and filters for other users.

**How:** Open the Excel Client. In the **Explorer** tab, in the **Libraries** section, click **Reports Library > Comparative Analytics Utilities > Security Setup**. Double-click **Comparative Analytics Security Update**.

Assign custom filters for the Axiom Intelligence dashboards in the **AI Tables** tab of the **Security Manager**.



► Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Understanding Comparative Analytics user roles"
- "Using the Security Update utility to manage user access"
- "Managing user access to Axiom Intelligence"



# Update peer group priority

## ▶ Why use this feature

Use this feature to prioritize the primary peer group that displays in each dashboard. This feature is especially useful if you are especially interested in data on a specific peer group and do not want to have to select that peer group each time you open a dashboard. This feature can also help limit extraneous information from dashboards used to compare specific data points.

## ▶ How this feature works

This feature allows you to select a primary peer group that displays automatically for each entity or department. That peer group will display automatically in select dashboards whenever the data of that entity or department is displayed.

**Where:** The **Update Peer Group Priority** page is accessible from the Comparative Analytics homepage. Priority selections effect the data displayed on the Expense Opportunity, Detailed Department Report, Entity Performance, and the Metric Explorer dashboards.

**Who:** Comparative Analytics administrators have access to this feature.

**How:** On the Comparative Analytics homepage, click **Update Peer Group Priority**. Click the **Filter** icon, select filter options, and click **Apply**. Use the **Activate** column to select which peer groups are active (displayed in the dashboards). Use the **Change Primary** column to select a primary peer group for an entity.

## ▶ Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Setting peer group priority"

# What to know before upgrading

**IMPORTANT:** You must apply the Axiom Software 2020.2 upgrade before applying any 2020.2 Axiom product upgrades. Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2020.2 before the first product upgrade. Refer to the **Axiom Software 2020.2 Release Notes** and **Axiom Healthcare Suite 2020.2 Release Notes** for considerations before upgrading.

When upgrading to the 2020.2 version of Axiom Comparative Analytics, keep in mind the following:

- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- Product task panes will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

# Preparing and scheduling upgrades

Summary of the upgrade process:

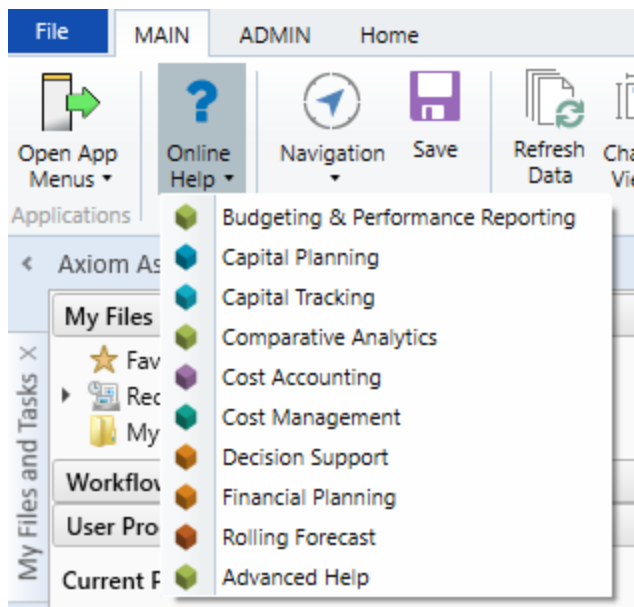
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact [support@kaufmanhall.com](mailto:support@kaufmanhall.com) to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
  - Desired Axiom Software platform version.
  - Desired Axiom for Healthcare product and version.
  - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Kaufman Hall can do this.
  - Propose an approximate two-hour downtime window when Kaufman Hall can apply update(s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Kaufman Hall).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

# Getting help and training

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

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

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



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



## ► Escalating to Axiom Support

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

# Issues resolved in 2020.2

The following table lists the resolutions for issues addressed in 2020.2:

Issue	Description
DDR Signs for Variances are opposite the Expense Improvement Opportunity Dashboard [TFS 41776]	<p><b>Symptom:</b> Detailed Department Report shows the opposite sign on variances compared to the Expense Improvement Opportunity Dashboard. The signs should be flipped to show unfavorable variances as negative and favorable variances as positive.</p> <p><b>Resolution:</b> Corrected by flipping the manual polarity on each for both internal and external comparisons.</p>
Metric Explorer - Labor Tab [TFS 37525]	<p><b>Symptom:</b> Worked Hours Per Visit should be on the Labor Tab.</p> <p><b>Resolution:</b> The ComparativeMeasure Table manages the menu system. This is refreshed from Factory each month. One of the measures for Hourly Rate was assigned a Major Category of Labor. It has since been changed to Salary and all subscribing clients have been updated as part of their monthly update.</p>
Help Codes for Expense Improvement Opportunity Dashboard [TFS 41829]	<p><b>Symptom:</b> Dashboard did not have contextual help.</p> <p><b>Resolution:</b> Corrected by adding contextual help to the dashboard.</p>
Expense Improvement Opportunity Dashboard - Filter and detail panels [TFS 45578]	<p><b>Symptom:</b> There are a handful of seemingly related workflows that can result in the filter and detail panels in the dashboards acting unresponsive. If a user clicks in the white space in a filter panel, the panel flickers white every time a user moves their cursor over it. In the detail panel, similar behavior will occur if a user clicks outside the dialog box. In both cases, hitting ESC addresses the behavior.</p> <p><b>Resolution:</b> Corrected by rebuilding the filter pane to use lines instead of shapes.</p>
Expense Improvement Opportunity Dashboard - Long descriptions [TFS 45580]	<p><b>Symptom:</b> Some of the item descriptions in the charts can be rather long, requiring them to be truncated with an ellipsis. And in the case of the tree maps, the squares may be too small to display text.</p> <p><b>Resolution:</b> Corrected by creating custom tooltips to display full text name for each page.</p>

Issue	Description
Expense Improvement Opportunity Dashboard - Department tab [TFS 45581]	<p><b>Symptom:</b> There are no spaces between the bars on the Metric Variance - Budget chart on the Department dashboard.</p> <p><b>Resolution:</b> Corrected by adjusting setting of the budget variance chart on the department tab to be consistent with all other charts.</p>
Expense Improvement Opportunity Dashboard - Selecting record in detail panel [TFS 45587]	<p><b>Symptom:</b> If a user is viewing the detail panel and selects a record, the charts in the background appear to be getting temporarily filtered by the selection. Once the detail panel is closed, any filtering is removed.</p> <p><b>Resolution:</b> Corrected by disabling interactions between the pop out box and other visuals in the background of the report.</p>
Expense Improvement Opportunity Dashboard - Filter panel selections [TFS 45588]	<p><b>Symptom:</b> A user is hopping from tab to tab in the Expense Improvement Opportunity Dashboard, sometimes via the links on the welcome screen and sometimes via drilling. In most cases, selections previously made in the filter panel are maintained.</p> <p><b>Resolution:</b> Corrected by updating Enterprise bookmark settings.</p>
Expense Improvement Opportunity Dashboard - Peer Group filters [TFS 45589]	<p><b>Symptom:</b> The Peer Group filter, which is single-select, is currently configured to use checkboxes rather than radio buttons giving the impression that users can select multiple options.</p> <p><b>Resolution:</b> Corrected by switching to radio buttons.</p>