

Administrator's Guide

Axiom Strategy Management
Version 2021.2

The logo for AXIOM, featuring the word "AXIOM" in a bold, white, sans-serif font. The text is enclosed within a thin, light blue rectangular border that has a slight 3D effect with a darker blue shadow on the right side.

AXIOM

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Contents

Chapter 1: Welcome to Axiom Strategy Management	6
What is covered in this document	6
What's new	6
Implementing best practices for Axiom Strategy Management	9
Understanding Axiom Strategy Management	9
Chapter 2: Getting Started	11
Home page	11
Launching Axiom Strategy Management applications	13
Navigation panel	15
Viewing system information	17
Web Client overview	17
Using the Desktop Client	25
About System Administration	43
Chapter 3: Configuring Settings	48
Change default system names	48
Update the current period	49
Enable or disable the Initiative Overview tab	49
Chapter 4: Maintaining the strategy hierarchy	51
Maintaining Perspectives	51
Maintaining Objectives	53
Maintaining Initiatives	55
Chapter 5: Maintaining measures	66
About the Measures page	66
Measure maintenance tasks	67
Filter the Measures list	67
Add a measure	68
Edit or delete a measure	69
Maintaining measure types	71
Maintaining measure classes	72
Maintaining Perspective measures	73
Maintaining Objective measures	76
Add a benchmark to a measure	79

Managing measure drills	81
Update measure data	84
Create measure data rows	86
Update measure target status	88
Update period measure summary data	89
Delete orphaned measure data	90
Update imported measure data actuals	91
Resolve imported measure data exceptions	92
Chapter 6: Axiom Strategy Management reports	94
Initiative Status report	94
About the Cost Reduction Status report	96
Filtering Initiative reports	101
Chapter 7: Intelligence Center	104
Intelligence Center overview	108
Managing report files in the Intelligence Center	111
Managing folders in the Intelligence Center	116
Chapter 8: Web Reports	120
Managing Web Reports	120
Creating new web reports	125
Creating new web reports from template	133
Using the Report Builder	137
Managing Fixed Row Structures	193
Opening web reports	221
Viewing and exploring data in web reports	222
Saving a PDF copy of a web report	226
Exporting grid data in a web report to Excel	228
Production reporting for web reports	230
Chapter 9: Administering Security	255
About user roles	255
Add a user	260
Assign roles to users	261
Appendix A: Reference	263
Launch the Desktop (Excel or Windows) Client	263
Get Perspective icons	264

About measures	265
About Key Performance Indicator icons	266
About Initiative milestones	270



Welcome to Axiom Strategy Management

Axiom Strategy Management is a component of the Syntellis 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 2021.2 Axiom Strategy Management!

Enhancements in this release include the following:

[New utility updates user IDs to full names](#)

The Update User ID to Full Name utility enables administrators to convert user names displayed as user IDs in Initiative lists to full user names, making it easier to determine which person performed what

activity on an Initiative. This only applies to user names added to your system before the 2021.2 release; names added starting with 2021.2 are automatically displayed as full names. The utility needs to be run only once.

New utility converts displayed user IDs to full names

► Why use this feature

The Update User ID to Full Name utility enables administrators to convert user names displayed as user IDs in Initiative lists to full user names, making it easier to determine which person performed what activity on an Initiative. This only applies to user names added to your system before the 2021.2 release; names added starting with 2021.2 are automatically displayed as full names.

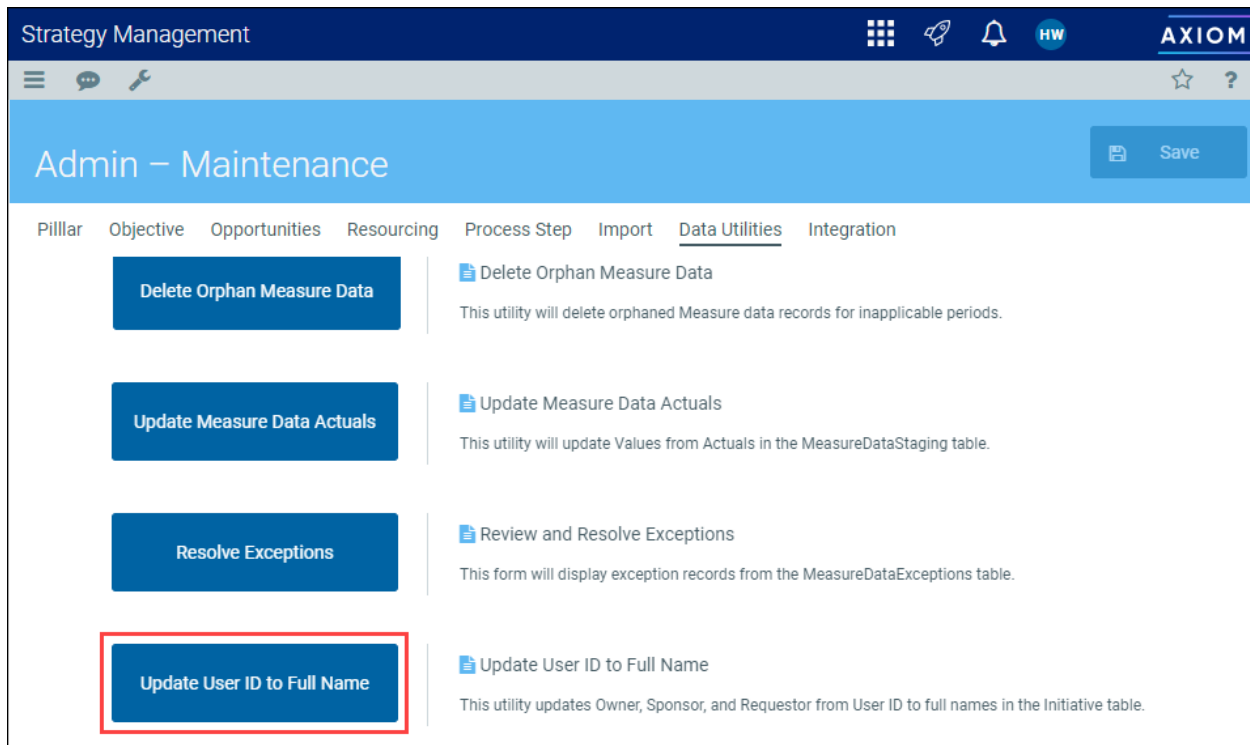
► How this feature works

To update user IDs displayed in Initiative lists on Axiom Strategy Management pages, the administrator runs the Update User ID to Full Name utility located under the Data Utilities tab on the Maintenance page. The utility replaces the ID name abbreviations with users' first and last names. You only need to run this utility once.

Where: This change applies to user names displayed in Initiative lists on the Dashboard, Perspectives, Objectives, and Initiatives pages.

Who: Only Axiom Strategy Management administrators can use this utility.

How: From the admin **Maintenance** page, under **Data Utilities**, click the **Update User ID to Full Name** button.



► Where to find more information

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

- [Convert displayed user IDs to full names](#)

Implementing best practices for Axiom Strategy Management

Though 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.

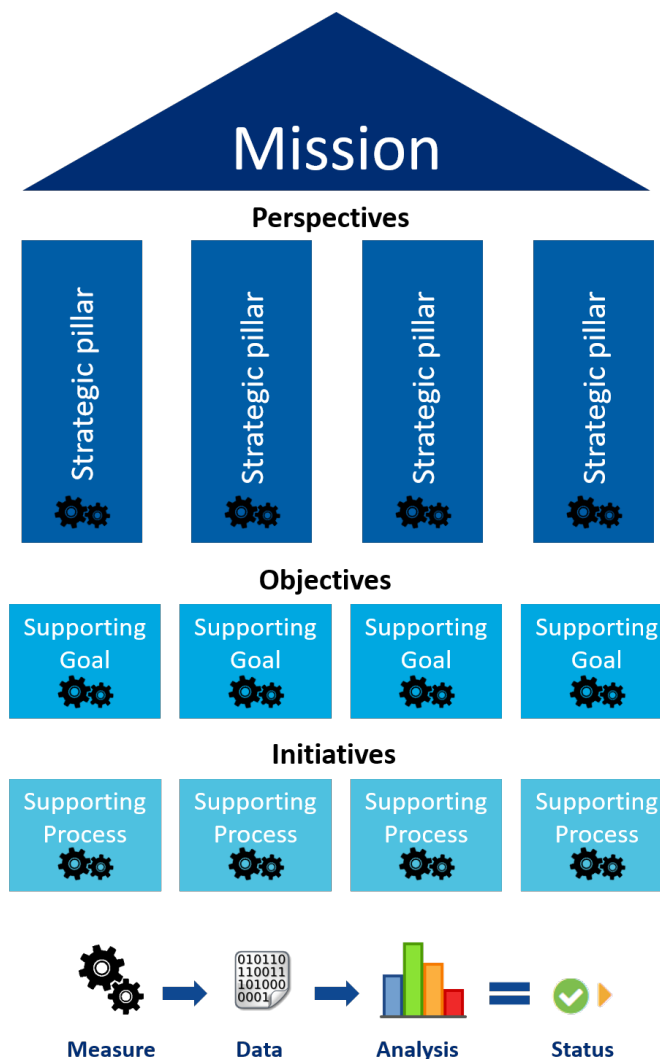
Perspectives – Strategic pillars that uphold your organization’s mission. For example, if your organization is a hospital, one of your Perspectives might be Clinical Performance or Community Health Leader. Each Perspective has one or more associated Objectives.

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.



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.

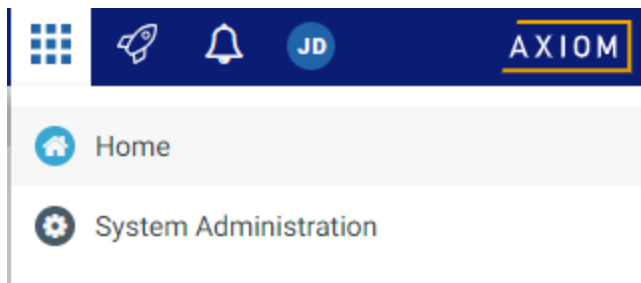
Unlike other Axiom Software products, Axiom Strategy Management is designed to be used almost exclusively in the Web Client. However, as an administrator, you need to be familiar with the Desktop Client because some administrative tasks currently cannot be performed in the Web Client.

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:

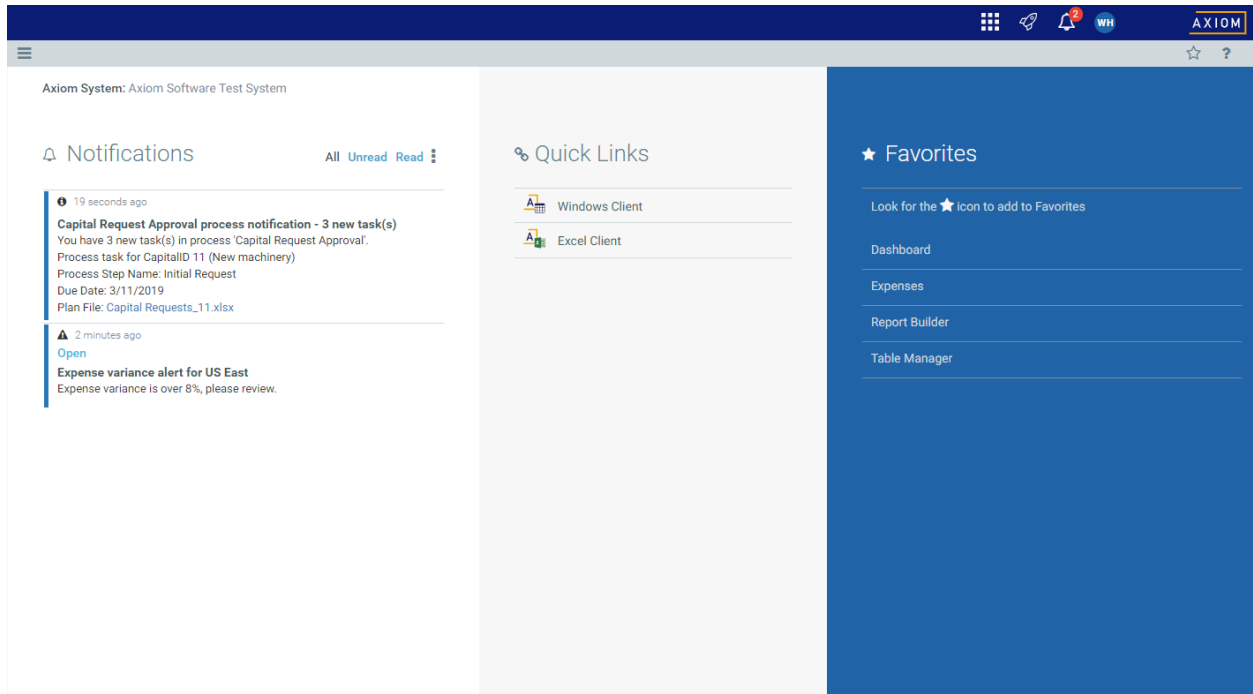


Home option on Area menu

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 Cloud URL `https://ClientName.axiom.cloud/Home/Launchpage`
Where *ClientName* is the name of your Axiom Cloud system.

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.

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.

NOTE: Quick links to client applications only display if you have security permissions to launch the application. If you do not have permission to any quick links, then the Quick Links section is hidden on your home page.


- **Favorites:** You can open and delete [web favorites](#).

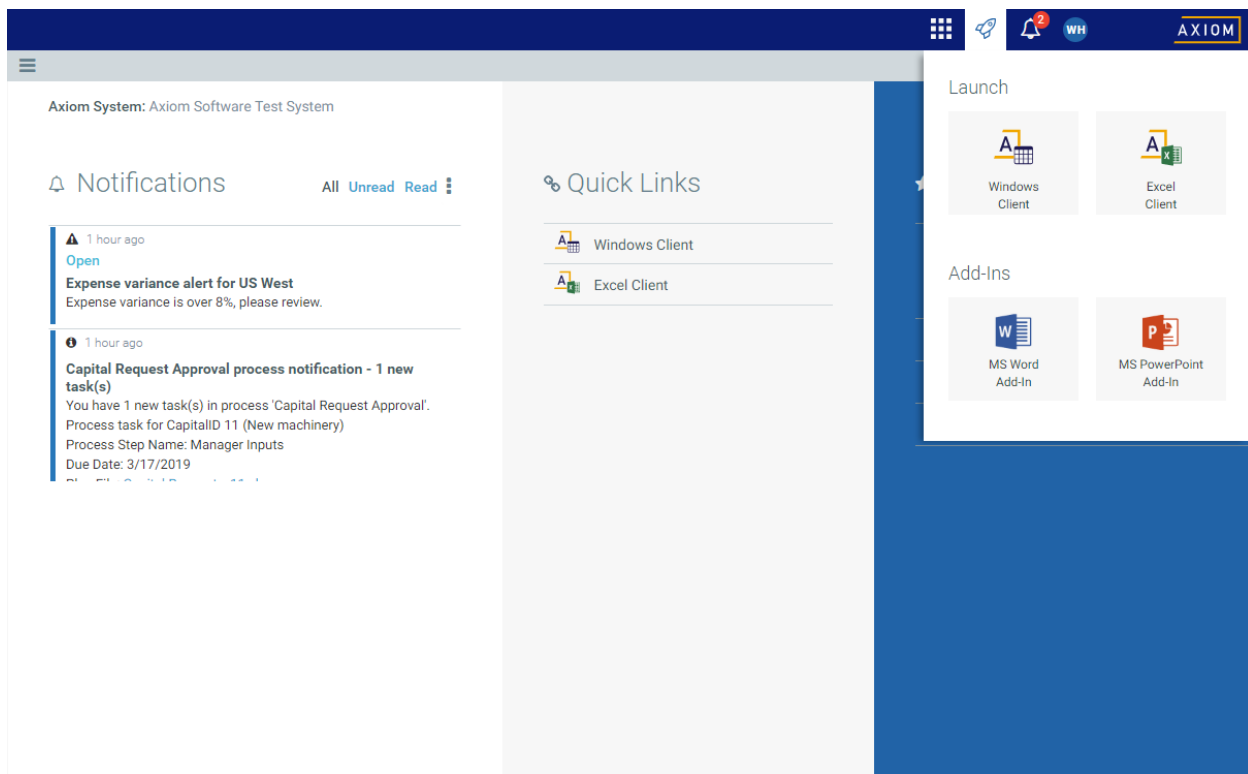
Launching Axiom Strategy Management applications

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

NOTE: The specific clients and add-ins listed on the Quick Launch menu depend on your particular security permissions (as defined on the **Permissions** tab of security). If you do not have permission to a particular client or add-in, then that item does not display on the Quick Launch menu. If you do not have security permissions to any of the applications on the Quick Launch menu, then the icon and the menu will not be present in the navigation bar.

► 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	<p>Launches the Axiom Windows Client on your desktop.</p> <p>You must have the Windows Client Access security permission in order to see this icon and launch the client. If you do not have this permission, the Windows Client icon is hidden.</p>
Excel Client	<p>Launches the Axiom Excel Client on your desktop. Requires Microsoft Excel.</p> <p>You must have the Excel Client Access security permission in order to see this icon and launch the client. If you do not have this permission, the Excel Client icon is hidden.</p>

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. Your browser must support ClickOnce in order to install and launch the client.

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, and grant access to the clients as needed.

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 [Axiom Cloud Technical Guide](#) (Axiom Cloud 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:

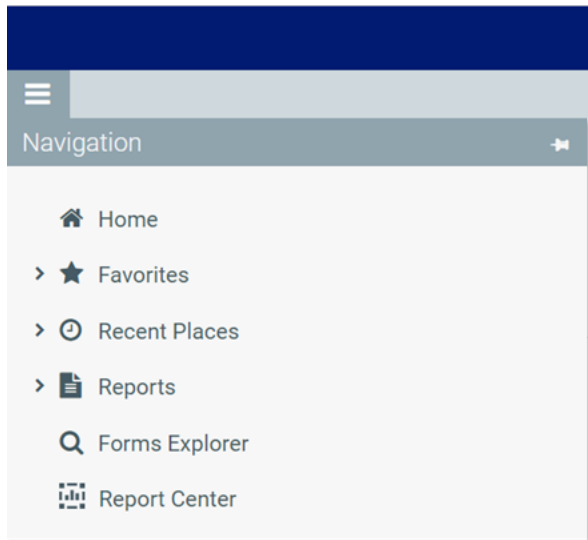
Item	Description
MS Word Add-In	Launches the Axiom Strategy Management Add-In for Microsoft Word. You must have the Word Add-In Access security permission in order to see this icon and launch the add-in. If you do not have this permission, the icon is hidden.
MS PowerPoint Add-In	Launches the Axiom Strategy Management Add-In for Microsoft PowerPoint. You must have the PowerPoint Add-In Access security permission in order to see this icon and launch the add-in. If you do not have this permission, the icon is hidden.

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	<p>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 Intelligence Center.</p> <p>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.</p>
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	<p>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.</p>

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

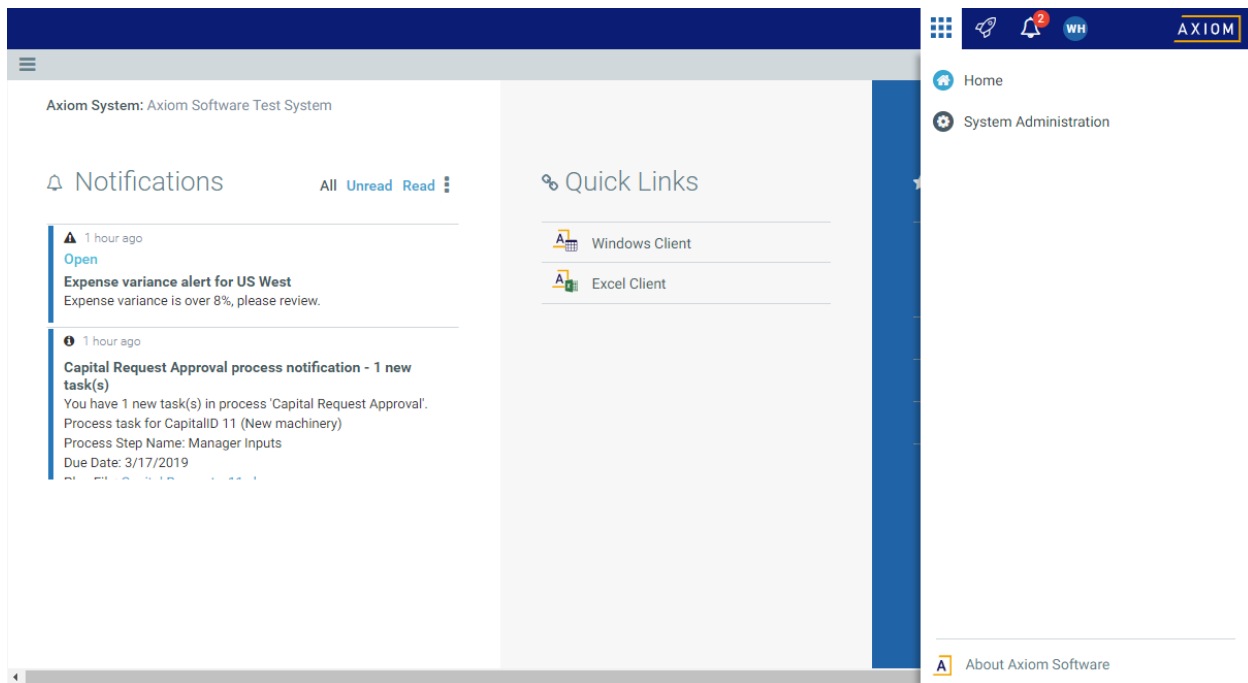
Use the Axiom Strategy Management About box to see information about your current system, such as:

- 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

Task Bar

Filters

Expense Category
Choose a value for ACCT. x

Sales Region
Choose a value for Region. x

Apply Clear All Cancel

Q1				Q2		
Jan	Feb	Mar	Q1 Total	Apr	May	June
\$802,424	\$578,026	\$731,392	\$2,111,842	\$684,279	\$622,209	\$813,543
\$2,628,929	\$2,682,378	\$2,728,675	\$8,039,982	\$2,957,031	\$2,653,844	\$2,740,958
\$49,273	\$127,166	\$49,578	\$226,016	\$45,359	\$49,057	\$55,112
Jan	Feb	Mar	Q1 Total	Apr	May	June
\$1,673	\$1,675	\$1,673	\$5,022	\$1,675	\$4,006	\$1,675

► 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

Quick Launch menu

Area menu

Alerts and notifications

User information

Expenses Overview
End of Q2 2019

WorldRegion	Q1				Q2
	Jan	Feb	Mar	Q1 Total	
▶ Asia	\$802,424	\$578,026	\$731,392	\$2,111,842	\$684,279
▶ Corporate	\$2,628,929	\$2,682,378	\$2,728,675	\$8,039,982	\$2,957,031
▶ Europe	\$49,273	\$127,166	\$49,578	\$226,016	\$45,359
▶ North America	\$5,189,167	\$4,728,858	\$4,873,126	\$14,791,151	\$4,392,112

All Unread Read

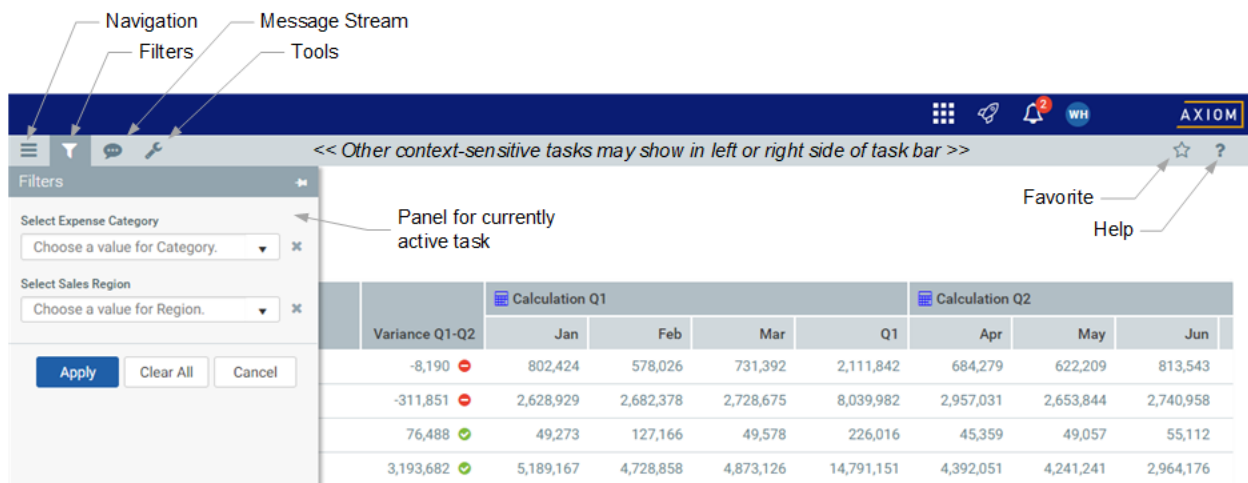
3 seconds ago
Open
Expense variance alert for US West
Expense variance is over 8%, please review.

8 minutes ago
Capital Request Approval process notification - 1 new task(s)
You have 1 new task(s) in process 'Capital Request Approval'.
Process task for CapitalID 11 (New machinery)

► 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



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.

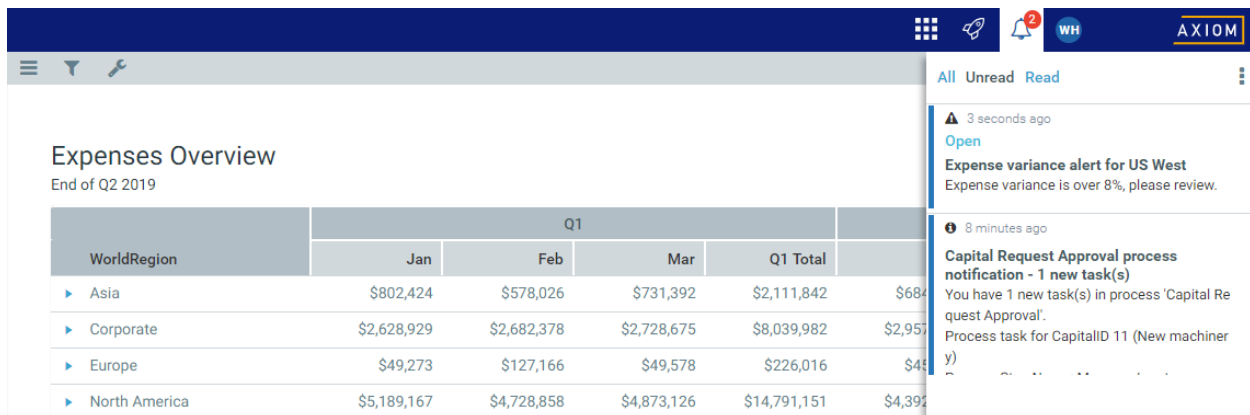
The contents of the task bar vary depending on the current page or document. For example, the Message Stream and the Filters panel are only available if they have been enabled for the current document. If a particular feature is not available for a particular document or area, then either it has not 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.
- **Scheduler jobs.** If you have run a Scheduler job manually and that job is configured to send notifications, you will be notified when the job completes or errors (depending on the notification configuration).

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



The screenshot shows the Axiom Strategy Management web client interface. The top navigation bar includes the Axiom logo and a Notifications icon with a red badge. The main content area displays an 'Expenses Overview' table for Q1 2019. The Notifications panel is open on the right, showing two notifications: an 'Expense variance alert for US West' and a 'Capital Request Approval process notification - 1 new task(s)'.

WorldRegion	Q1				
	Jan	Feb	Mar	Q1 Total	
▶ Asia	\$802,424	\$578,026	\$731,392	\$2,111,842	\$684
▶ Corporate	\$2,628,929	\$2,682,378	\$2,728,675	\$8,039,982	\$2,957
▶ Europe	\$49,273	\$127,166	\$49,578	\$226,016	\$45
▶ North America	\$5,189,167	\$4,728,858	\$4,873,126	\$14,791,151	\$4,392

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

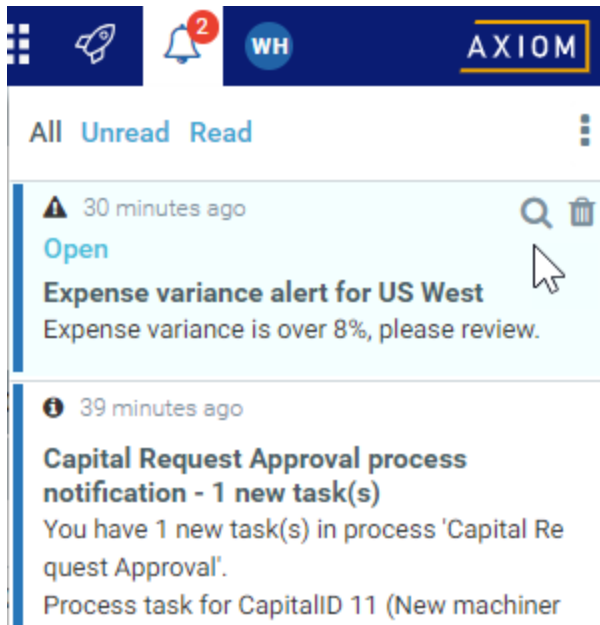
Within the panel, notifications are listed in the order they were received, with the newest notifications at the top. You can click the **All**, **Unread**, and **Read** links at the top of the panel to indicate which notifications you want to see in the panel. By default, the panel shows all notifications. 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

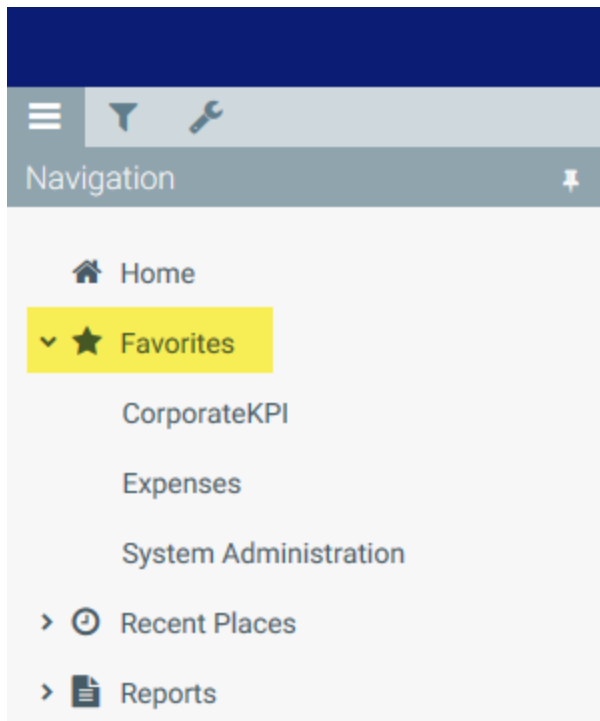
Hover your cursor over the menu icon  in the top right of the Notifications panel to perform the following actions:

- **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

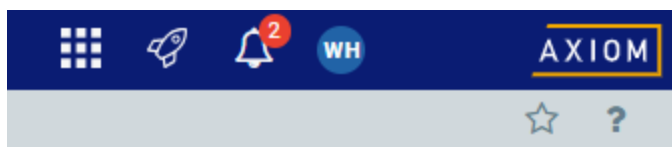


Example favorites in Navigation panel

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.

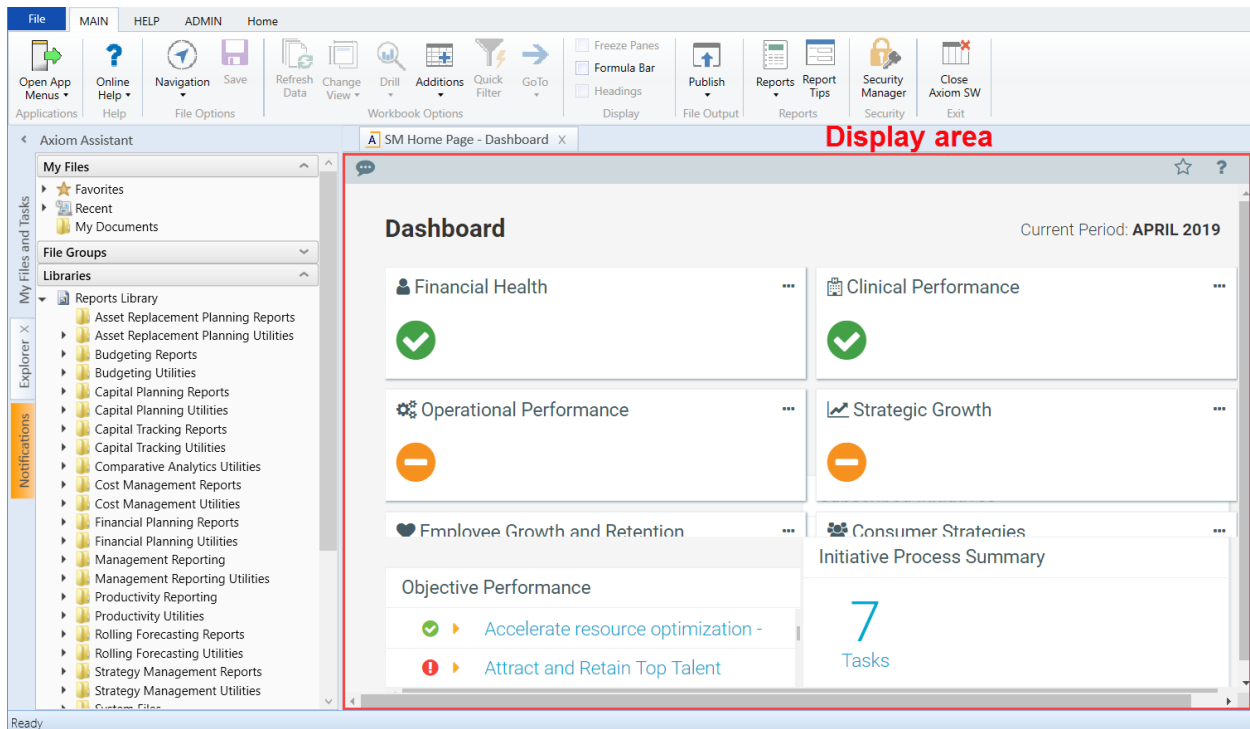
Using the Desktop Client

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.

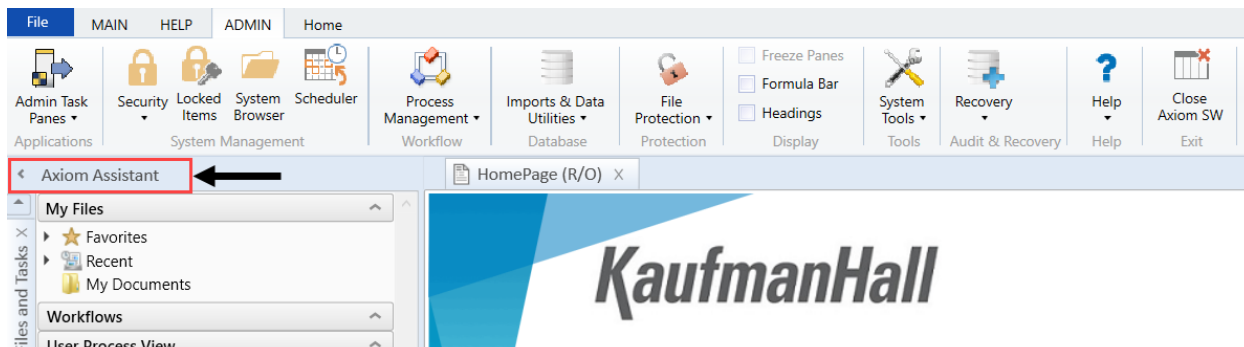
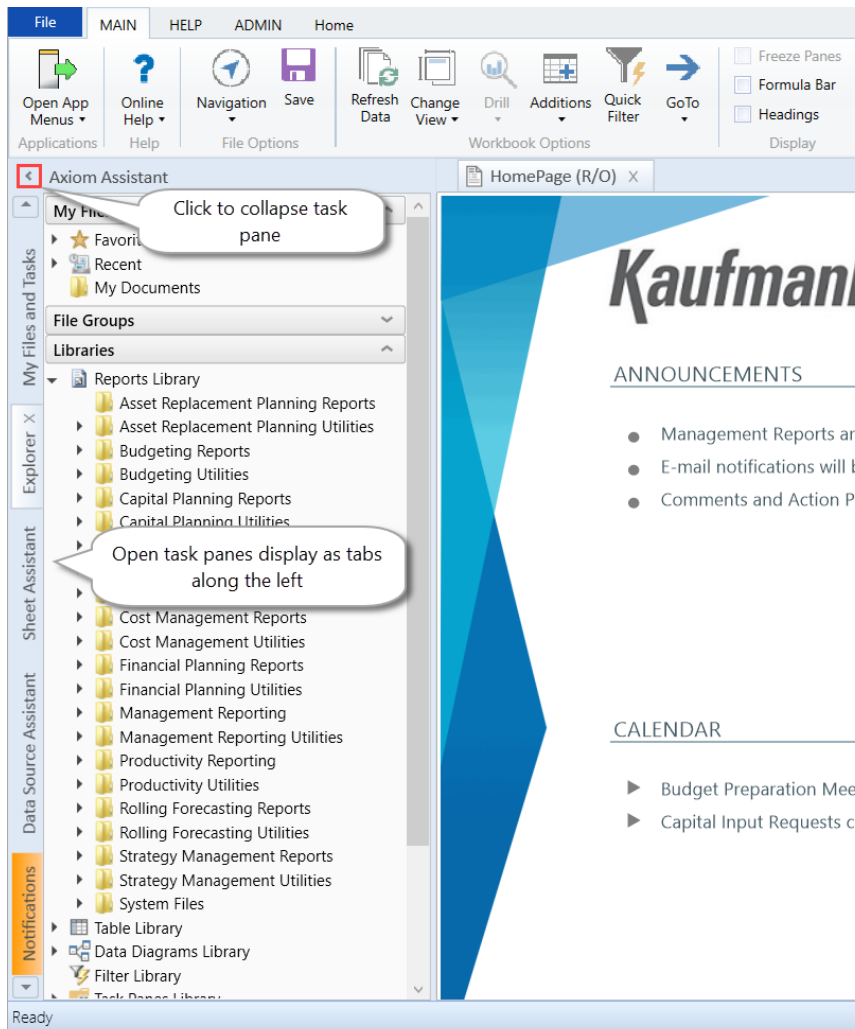
► Display area

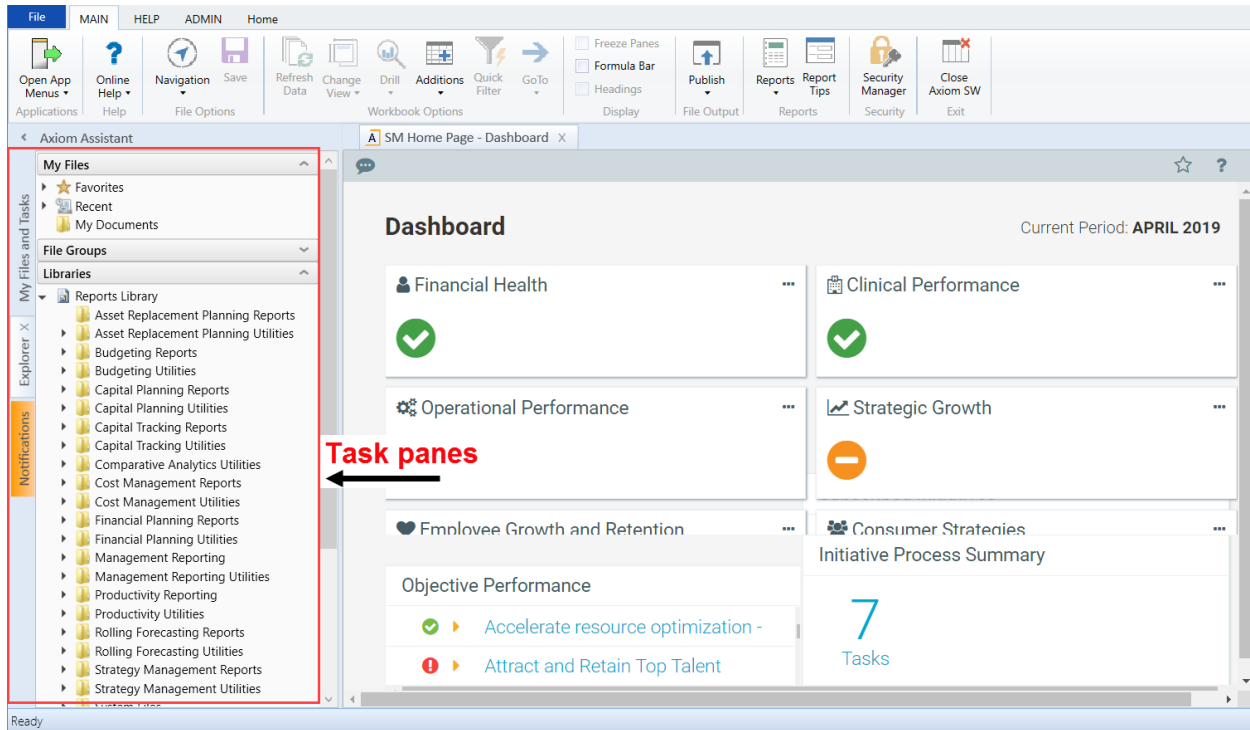
The main area of the Desktop Client displays open files. By default, it shows the Axiom Strategy Management Dashboard. The display here is essentially identical with the one in the Web Client; the only pieces missing are the side navigation panel, replaced by the Axiom Assistant pane; and the Web Client 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.





► Ribbon tabs

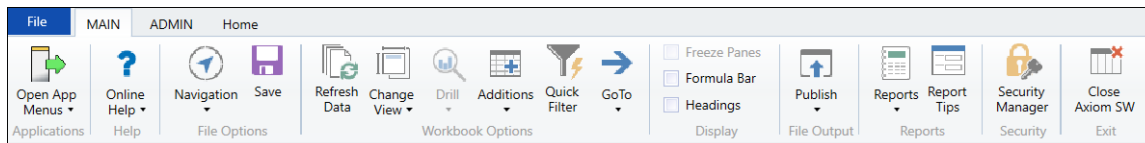
Ribbon tabs provide access to commonly used features and shortcuts to frequently accessed files. They display above the task pane and main display areas. The role assigned to you determines the ribbon tabs that display. For example, the Admin ribbon tab only displays to those users assigned the Administrator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

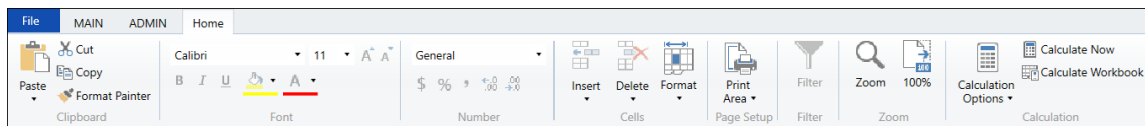
Includes commands for accomplishing most tasks in Axiom:

- 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

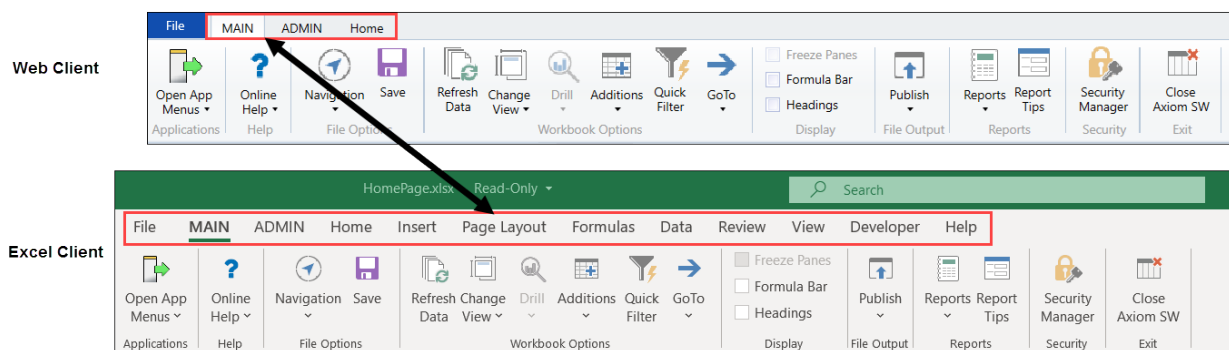
Includes standard spreadsheet commands.



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	<ul style="list-style-type: none">• Emulates a spreadsheet environment without requiring Excel.<ul style="list-style-type: none">◦ 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	<ul style="list-style-type: none">• 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

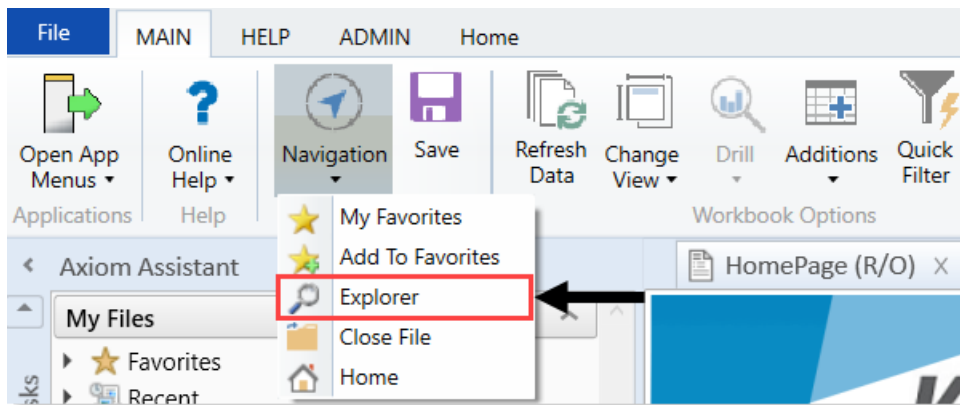
Axiom Strategy Management provides a built-in Explorer task pane so that you can quickly access your favorites, recent items, and all the files that you have rights to access.

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:

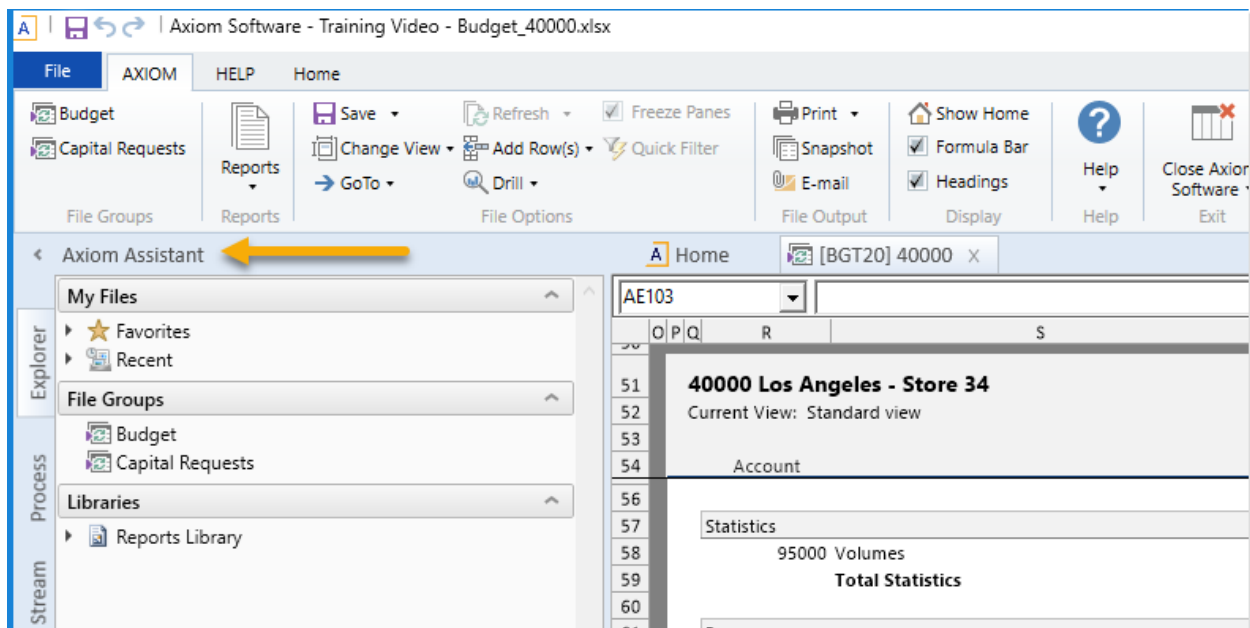
NOTE: Only administrators can access the Data tables.

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

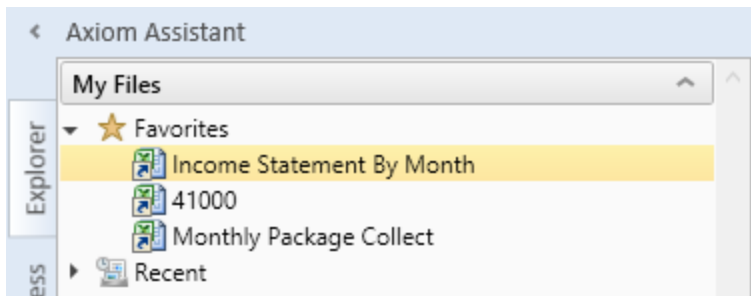
When using the Axiom Excel Client, each file opens within its own window, and each window maintains its own set of ribbon tabs and task panes. This means that as you switch windows, the set of task panes available in each window may be different. For example:

- 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 Strategy Management 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: GL2021 - 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.

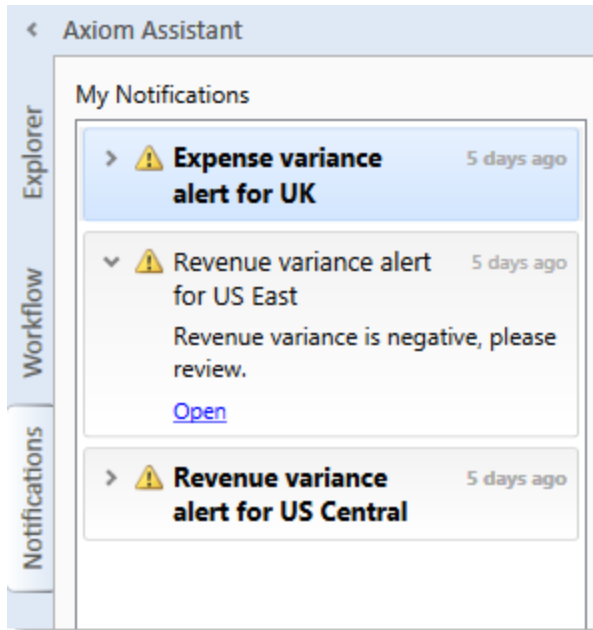
The list displays the last 15 files that you recently opened. Note the following:

- 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.
- **Scheduler jobs.** If you have run a Scheduler job manually and that job is configured to send notifications, you will be notified when the job completes or errors (depending on the notification configuration).

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.

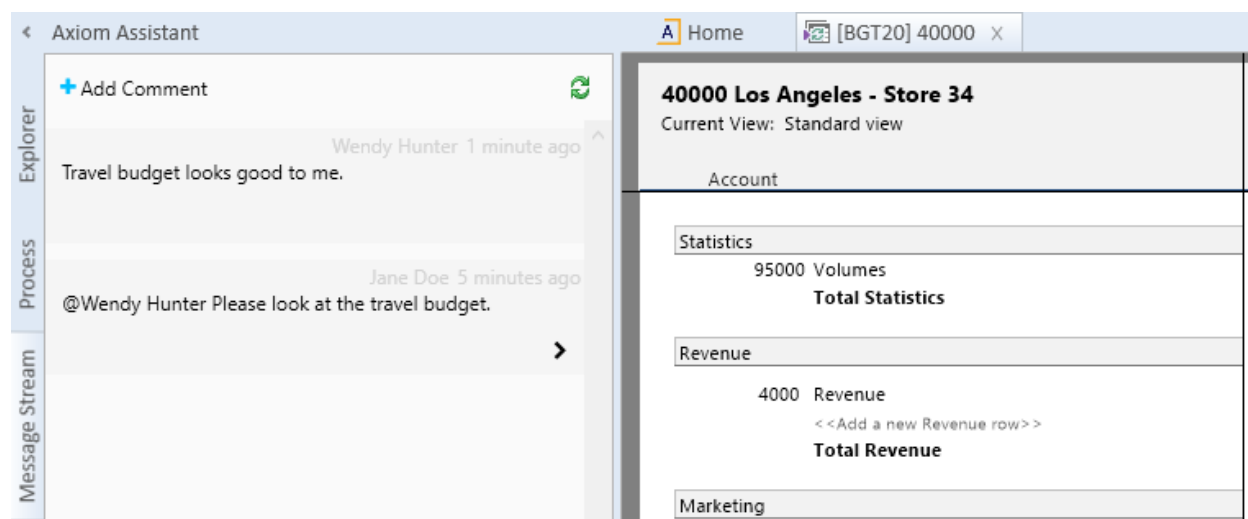
You can view comments and add comments using the Message Stream task pane. This is a system-controlled task pane that automatically opens for eligible documents.

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.

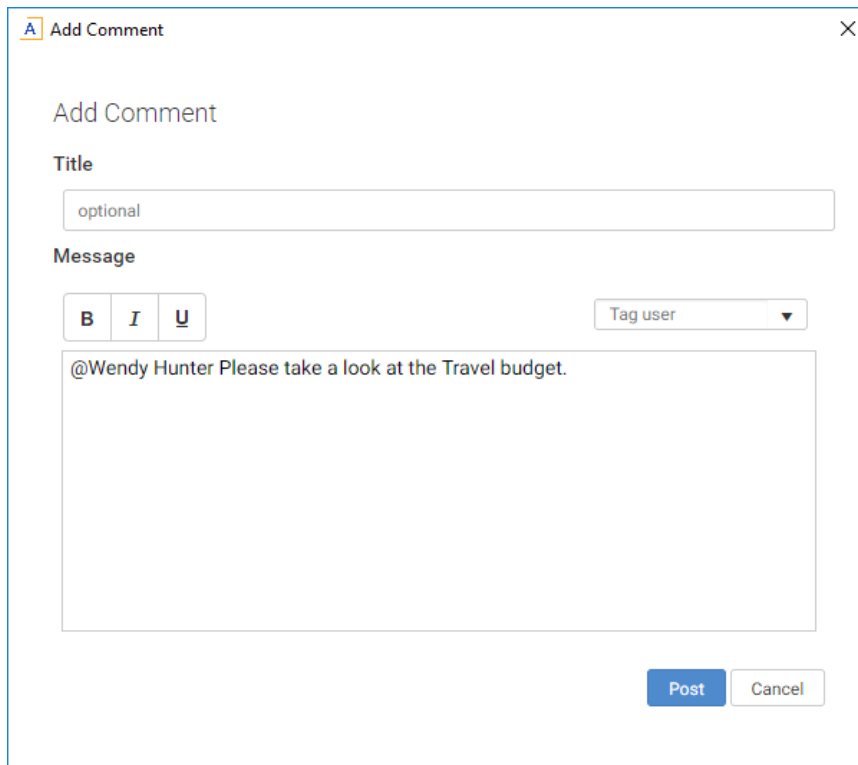
To view the full text and details of a comment, hover your cursor over the comment so that the > symbol displays on the right-hand side of the comment. Click the symbol to open a separate **Comment Details** dialog with the full comment text.

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)

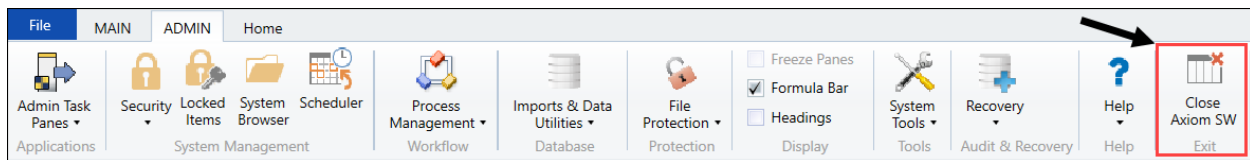
If you have made a comment in a document's message stream, or if you have been tagged in a comment, you are now subscribed to that document's message stream. Whenever a new comment is made to that document's message stream, you will receive a notification in the Notifications task pane.

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.

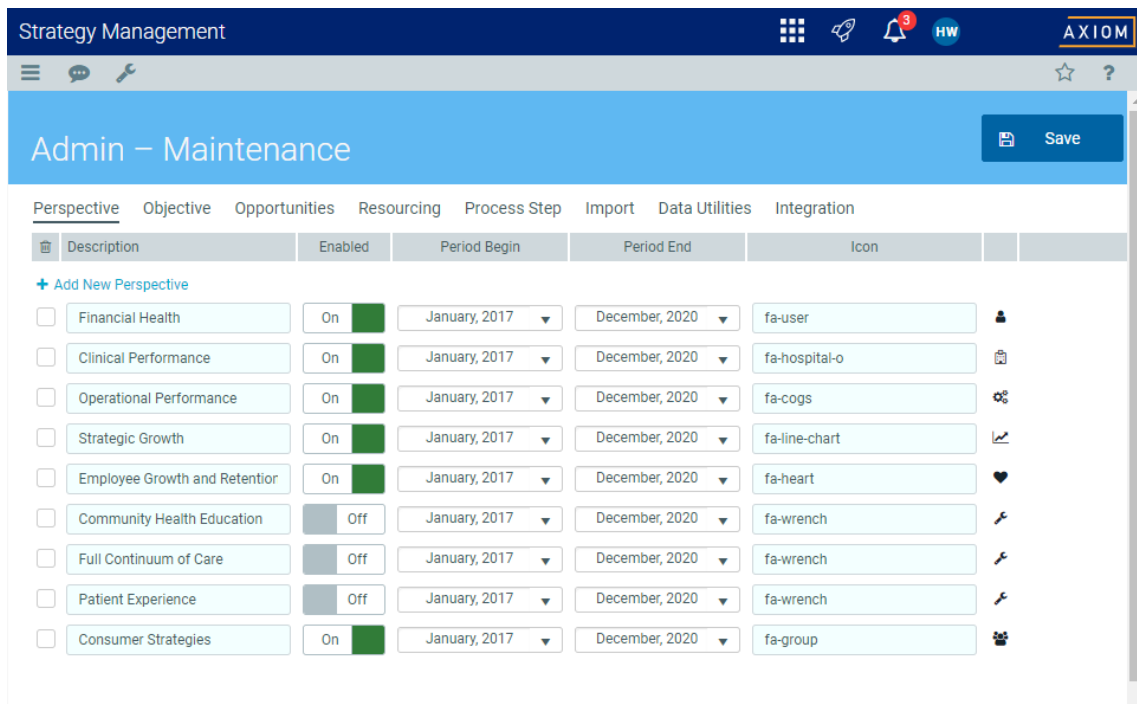
About System Administration

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 topic section.

► 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

Strategy Management

Admin – Settings

System Settings User Preferences

Default name for Perspective Perspective

Default name for Objective Objective

Default name for Initiative Initiative

SM Current Period January, 2019

Save

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

Strategy Management

Admin – Measures

Update Measure Data Save

Measures Perspective Measure Objective Measure Drill Documents Type Class

Class Filter [All] Search Type to Search... Filter Disabled On

Description	GL Acct	Class	Type	Unit	Frequency	Formula Description	Enabled	No Select
Accounts Payable	Type to search	CM MetricID-Financial	Calculated	Amount	Monthly		On	No Select
Accounts Receivable	Type to search	CM MetricID-Financial	Calculated	Amount	Monthly		On	No Select
Adjusted Admissions	Type to search	CM MetricID-Financial	Calculated	Number	Monthly		On	No Select
Adjusted Discharges	Type to search	CM MetricID-Financial	Calculated	Number	Monthly		On	No Select
Adjusted Patient Days	Type to search	CM MetricID-Financial	Calculated	Number	Monthly		On	No Select
Anesthesia Supply Expense per Case Attended	Type to search	CM MetricID-Financial	Calculated	Amount	Monthly		On	No Select
AN-Measure tracking dollars spent - higher	1 - Salary & Hours Analysis	CM MetricID-Financial	Input	Amount	Annually		On	No Select
AN-Tracking dollars spent - higher	1 - Salary & Hours Analysis	CM MetricID-Financial	Input	Amount	Annually	Annual number	On	No Select
Artificial hip supplier costs	24 - Contract Labor Expense as % of...	CM MetricID-Financial	Input	Amount	Monthly	Cost per artificial hip averaged out per patient	On	No Select
Average Length of Stay	Type to search	CM MetricID-Financial	Calculated	Number	Monthly		On	No Select
Average Rate per Hour	Type to search	CM MetricID-Financial	Calculated	Amount	Monthly		On	No Select
Average Time to Schedule a Primary Care Visit	Type to search	CM MetricID-Financial	Calculated	Number	Monthly	For Employed Providers, average time between	On	No Select
Bad Debt Expense	Type to search	CM MetricID-Financial	Calculated	Amount	Monthly		On	No Select
Bad Debt Expense as % of Gross	Type to search	CM MetricID-Financial	Calculated	Percent	Monthly		On	No Select
Benefit Expense	Type to search	CM MetricID-Financial	Calculated	Amount	Monthly		On	No Select
Benefit Expense as % of Wages	Type to search	CM MetricID-Financial	Calculated	Percent	Monthly		On	No Select
Blood Supply Expense per Adjusted Discharge	Type to search	CM MetricID-Financial	Calculated	Amount	Monthly		On	No Select
Cash Lab Visits	Type to search	CM MetricID-Financial	Calculated	Number	Monthly		On	No Select
Catheter-associated Urinary Tract Infection (CAUTI) Rate	Type to search	Patient Safety	Input	Percent	Quarterly	Total number of observed healthcare-associ	On	No Select

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](#)

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**.

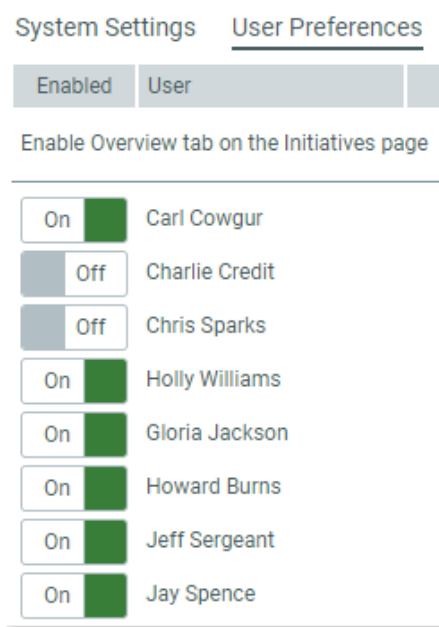
Enable or disable the Initiative Overview tab

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.

Maintaining the strategy hierarchy

During initial setup of Axiom Strategy Management, your Syntellis 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 **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
OwnerName	First name, Last name	Full name of user	Security Manager
Sponsor	Username	User who sponsors the Initiative	Security Manager
SponsorName	First name Last name	Full name of user	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
Category	Number	Select a category for the Initiative; otherwise, enter "0" for None	Table Library > Strategy Management > Data > InitiativeCategory
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

Data field	Format	Description	Lookup location
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
InitiativeRequestorName	text	Full name of the person who requested the Initiative.	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**.

The screenshot shows the 'Strategy Management' header and a navigation bar with icons for menu, chat, and settings. Below this is a blue banner for the 'Capital Project Integration Utility'. A message states: 'Use this utility to create Initiative plan files in Strategy Management based on the selected plan files in Capital Planning File Groups.' The main section is titled 'Select Source File Group:' and features a dropdown menu. The dropdown is open, showing three options: 'CapitalPlanning-2019 (Prior Year)', 'CapitalPlanning-2020 (Current Year)' (which is highlighted), and 'CapitalPlanning-2021 (Next Year)'.

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.

Source File Group: CapitalPlanning-2019 (Current Year)

CAPRE...	En...	Dept	Description	ProjType	ProjTypeDetail	Creator	Project Target
12	2	21010	Acquisition, SW MOB Acquisition	Miscellaneous	Acquisition	SFalkner	\$1,951,000
13	2	26440	General Construction, Third Floor NICU	Engineering / Facilities	General Construction	CYates	\$1,876,000
14	2	27640	General Renovation, OR Remodel	Engineering / Facilities	General Renovation	JHudson	\$1,000,000
15	2	27540	General Construction, Sleep Lab Expansion	Engineering / Facilities	General Construction	GChambers	\$1,125,000
17	2	27400	General Construction, New Cardiac Center	Engineering / Facilities	General Construction	Sjackson	\$14,250,000
19	2	26140	Defibrillator / Pacemaker, Defibrillators for ED	Cardiology	Defibrillator / Pacemaker	MErving	\$64,500
20	2	26140	Monitor, Vital Signs Monitors	Miscellaneous	Monitor	MErving	\$22,000
22	1	26310	Monitor, Transport Monitor for Patient Sedations	Miscellaneous	Monitor	FWilliams	\$20,000

Previous Submit

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.

<input type="checkbox"/>	ID	Initiative	Owner	Sponsor	Current Step
<input type="checkbox"/>	47	Sports center staff	CT-HWilliams	CT-HWilliams	Active Tracking
<input checked="" type="checkbox"/>	48	Reduce physician turnover	SDrew	CCredit	Committee Approval
<input type="checkbox"/>	50	Phase 3 ED Triage program	SKlein	jseargent	Committee Approval

5. Click **Yes**.

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

Event DeletePlanFile-SQL has been scheduled.

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

- Initiative table
- InitiativeMilestoneData
- InitiativeMeasureData
- InitiativeMilestone
- InitiativeMeasure
- InitiativeResource
- InitiativeOpportunity

Convert displayed user IDs to full names

In Owner and Sponsor columns in Initiative table grids on Axiom Strategy Management dashboard pages, user IDs were displayed instead of full user names. In version 2021.2 of Axiom Strategy Management, when you add a user to an Initiative as sponsor or owner, the user's full name displays instead of their user ID. However, user names added to Initiatives before version 2021.2 still display as user IDs. Administrators can convert these user IDs to full names using the Admin data utility Update User ID to Full Name.

To convert user IDs to full names:

1. In the **Navigation** panel, click **Admin > Maintenance**.
2. On the **Maintenance** page, click **Data Utilities**.
3. In the list of utilities, click the **Update User ID to Full Name** button.
4. If desired, verify that users' full names are displayed on the Dashboard, Perspectives, Objectives, and Initiatives pages where applicable.

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 Syntellis 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.

- 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.

- (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.

- Click **OK**.
- 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 Syntellis/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.

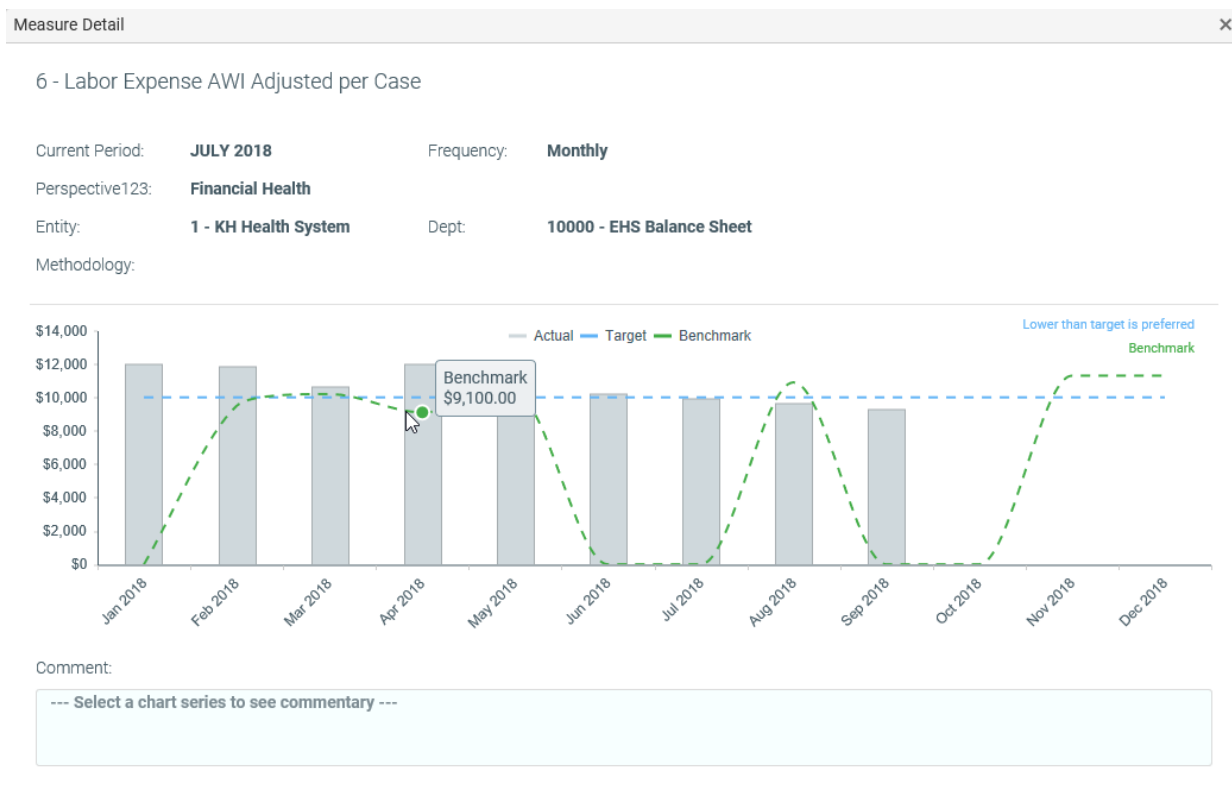
- To delete the Objective measure,
 - a. Verify that it can be deleted: if there is a check box to the left of the Objective measure name, it can be deleted. If there is a circle with a slash through it (⊘) instead of the check box, you cannot delete the Objective measure.
 - b. Select the **check box**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

- For each month that you want to provide a benchmark, enter the number in the column for that month.
- In the Ribbon's **Main** tab, click **Save**.
- 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.

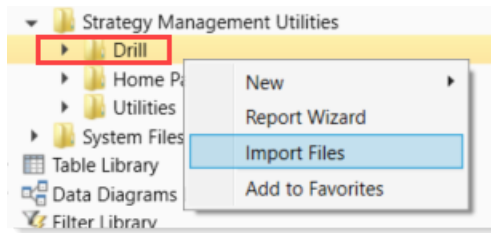
As a system administrator, you can control and customize the reports and other documents that users can drill to from a given measure. When you add a drill to a measure, the system adds a Launch Detail button in the upper right corner of the Measure Drill window. Clicking the button launches the drill 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

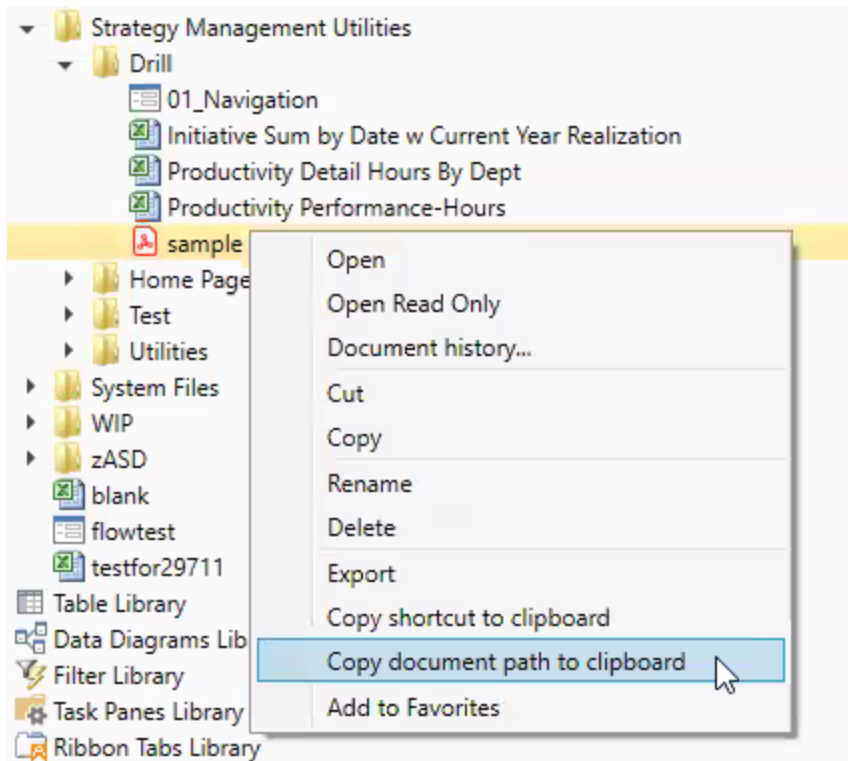
Use these instructions to add a document drill to a measure to create a drill down in the measure's associated Measure Detail window. Creating a measure drill involves three main steps: 1) add the drill document to Strategy Management, 2) create a drill for the document, and 3) associate the drill with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

Add New Drill

Description

Active ☐

Drill Filepath Web Enabled ☐

Example: \Axiom\Reports Library\Strategy Management Utilities\Drill\Productivity Detail Hours By Dept.xlsx

OK Close

(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

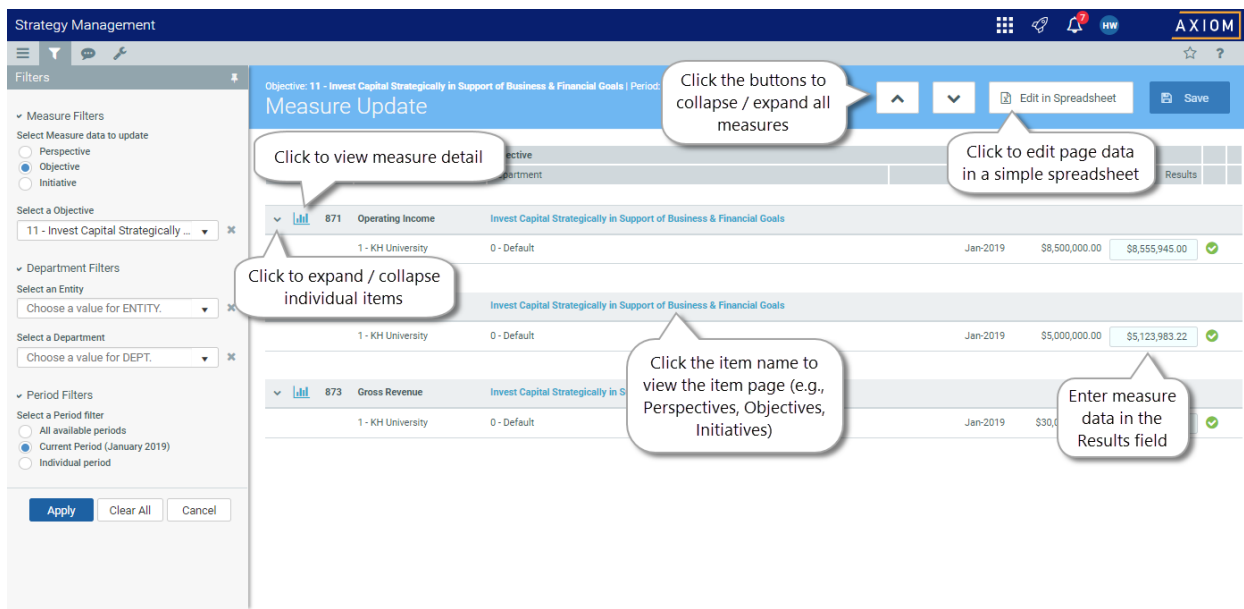
NOTE: You cannot change the document associated with a drill. Instead, [create a new drill](#) for the new document, then remove the old drill from any measures, and then delete the old drill. Assign the new drill to the measure(s).

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.

	A	B	C	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	Department	Entity	YRMO	Value	Target	Score		
8	Delete Row	Objective	Measure	Dept	Entity	YRMC	Value	Target	Score	MeetsTarget		
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."

	A	B	C	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	Client Benchmark by measure
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 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.

Update Measure Data Actuals

 Update Measure Data Actuals

This utility will update Values from Actuals in the MeasureDataStaging table.

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.

Resolve Exceptions

 Review and Resolve Exceptions

This form will display exception records from the MeasureDataExceptions table.

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

Strategy Management								
Resolve Measure Data Exceptions								
Resolved?	Measure	Dept	Entity	Period	Value	Source	Date	
<input type="checkbox"/>	98	26360	2	201908	5463	AcctSvcs	8/8/2019	
<input type="checkbox"/>	45	26310	2	201908	0.045	AcctSvcs	8/12/2019	
<input type="checkbox"/>	36	26460	2	201908	34.29	MDmercs	8/12/2019	
<input type="checkbox"/>	992	26470	1	201908	1	MDmercs	8/12/2019	
<input type="checkbox"/>	645	9	2	201908	2	ETLPMD	8/12/2019	
<input type="checkbox"/>	223	88	1	201908	2	ETLPMD	8/12/2019	
<input type="checkbox"/>	7	10000	1	201812	4029.131313	AcctSvcs	8/18/2019	

- 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.
- 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
Seq	Measure	Department	Entity	YRMO	Value	Data Source	Date of Data	Resolved Flag	Resolved By
Seq	Measure	Dept	Entity	YRMO	Value	Src	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.

Axiom Strategy Management reports

Axiom Strategy Management comes with two built-in standard reports, the Initiative Status Report and the Cost Reduction Status Report. These reports are available from the Reports menu in the Navigation panel.

Initiative Status report

The basic report displays a status icon, checkmarks that indicate whether an Initiative has measures and milestones (or a dash if they do not), and a description of each Initiative.

Initiative status is based on [milestone status](#). For each included Initiative, the Initiative Status report displays the icon for the milestone with the most urgent status. For example, if all milestones are On Track or Complete, the KPI used is the green circle with check mark. If one or more of the milestones has the status Needs Attention, the report displays the orange circle with bar. If the status is At Risk, the system displays the red triangle with exclamation point.

While all Initiatives are included by default, not all of the information about each Initiative is automatically included. For example, to see Initiative sponsors and owners, you need to select those options in the Filters panel.

The report displays Initiatives grouped under the Perspective and then the Objective to which they belong. The report does not include any measure data.

Initiative Status Report

System Period: September 2018 | Perspective: 2,1,3 | Sponsor: jseargent | Owner: CSparks;HBurns;SDrew;SKlein | Workstream: 0,1,2,3,4,5,6 | Category: 0,1,2,3 | Initiative Status: 2,3,4

















Perspective

Clinical Performance

















Financial Health

Objective

Effectively Manage Controllable Supplies Expense related High-Cost Implants & Drugs

ID	Initiative	Status	Measures	Milestones	Sponsor	Owner	Workstream	Category	Detail Description
31	 Maintain decreased per unit usage				jseargent	CSparks	Non-Labor	Rapid Development	Maintain decreased per unit usage
32	 Billing for drug waste (savings added to 340B savings).				jseargent	SKlein	Non-Labor	Quick Win	Billing for drug waste (savings added to 340B savings).
33	 SYS - Supply Chain GPO contract updates				jseargent	CSparks	Non-Labor	Quick Win	SYS - Supply Chain GPO contract updates
35	 Savings from TZCP contract renegotiation				jseargent	CSparks	Non-Labor	Rapid Development	Savings from TZCP contract renegotiation

Effectively Manage Labor Cost and Productivity in-line with Industry Best Practice

ID	Initiative	Status	Measures	Milestones	Sponsor	Owner	Workstream	Category	Detail Description
7	 Nursing Labor Optimization (CM)				jseargent	CSparks	Labor	Rapid Development	Design feedback processes to identify places where staff are clocking in too far in advance of their assigned shift, or clocking out later than scheduled.
	 Transcription Overtime				jseargent	CSparks	Labor	Complex	Reduce Transcription Overtime
	 Constant Observer				jseargent	SDrew	Labor	Quick Win	Constant Observer
22	 Constant Observer - Transfer 4.18 FTEs to ICU				jseargent	CSparks	Labor	Quick Win	Constant Observer - Transfer 4.18 FTEs to ICU

A summary of your filter selections displays here

Click to go to the Initiative's Routing page

Click to expand / collapse Objective sections

Click to open the plan file page

By default, executive and administrator users can view the status of all Initiatives in the report. Viewing access for non-executive and non-admin users is as follows:

- Initiative creators – Can view the status of all Initiatives
- Initiative owners – Can view the status of only Initiatives for which they are the owner
- Initiative sponsors – Can view the status of only Initiatives for which they are the sponsor
- Initiative approvers – Can view the status of all Initiatives

► View the report

To view the Initiative status report:

1. In the **Navigation** panel, click **Reports > Initiative Status**.

The report page opens.

2. To view Initiatives, click the blue arrow icons (►) to expand the Perspectives and then the Objectives sections.

NOTE: To view the plan file page for the Initiative, click the folder icon (📁). To view the Initiative's approval routing page, click the bookmark icon (🔖).


3. **Filter the report** to show only the Initiatives you want to see, or the Initiative data you want to see.

► Example filtered Initiative status report

The following general instructions are for filtering the report to display Initiatives with an At Risk status. You can filter the report further to suit your needs.

Initiatives with a status of At Risk

To find all Initiatives with no milestone status:

1. In the **Task Bar** on the left side of the page, click the filter icon ().
2. In the Filters panel **Status** section, in the **Initiative Status** filter drop-down, select **4 - At Risk** and then click **OK**.
3. Click **Apply**. All Initiatives that have a milestone status of At Risk are included in the report.
4. To see which owners the At Risk Initiatives belong to, (since owners are usually responsible for managing Initiative milestones), in the **Owner** filter drop-down, click **Select All**, click **OK**, then click **Apply**.
5. Expand the report sections to see who owns the Initiatives.

About the Cost Reduction Status report

The Cost Reduction Status report is a forms-based report that displays performance results from Initiatives that have cost-saving measures from a specific measure class: PI-Dollars-Performance Improvement. Performance Improvement measures are those that involve some sort of cost reduction or savings, or improvements to performance that result in a cost reduction, savings, or revenue enhancement.

The report displays the actual savings and the cost savings goal of each performance-improvement Initiative for the current period and over a set time span, which for this report is the fiscal year of the Axiom Strategy Management Current Period year and month (YRMO).

The report includes the following:

- Actual savings amount for the current period and for each period that contains data in the current fiscal year (YRMO)
- Fiscal year-to-date savings for each Initiative and cumulative savings of all Initiatives
- Fiscal year-to-date savings goal for each Initiative and cumulative savings of all Initiatives
- Project-to-date actual savings for each Initiative and cumulative savings of all Initiatives
- Project savings goal for each Initiative and cumulative savings of all Initiatives

In addition to the [Table](#), the report also contains bar charts that display these same savings cumulatively. For details, see the following sections,

- [How the report works](#)
- [Trend \(By Period\) chart](#)
- [By Group chart](#)

Axiom Strategy Management executives can use this report to monitor the achievement status of cost management initiatives at any time, on demand. This report is also available to system administrators and users who own or sponsor Initiatives included in the report.

► How the report works

The PI-Dollars-Performance Improvement class comes with one default measure of the same name: PI-Dollars-Performance Improvement. Axiom Strategy Management administrators can [create more measures](#) using this class if needed. When a measure from this class is applied to an Initiative, the Initiative becomes a cost-saving/performance-improvement Initiative.

The PI-Dollars-Performance Improvement measure acts as a filter for the Cost Reduction Status report. Any Initiative with at least one measure of this class is included in the report, regardless of which department the Initiative comes from or how much money is involved.

IMPORTANT: All dollars captured using the PI-Dollars-Performance Improvement measure are included in the Cost Reduction Status report, so take care to avoid duplication of cost savings measures. If cost savings measures are duplicated in two different initiatives, they will also be added twice in the Cost Reduction status report. If you are using these measures in conjunction with your budget, then you risk double-counting savings, resulting in budgets that are unachievable.

The report has three parts:

- A filter panel on the left that controls which performance improvement Initiatives are included in the report
- Two bar charts that display cumulative data from those Initiatives
- A table that displays the data specifics of each Initiative.

The table and the graphs both list the Initiatives that are included in the report, but other than that, the graphs operate independently from the table. When you filter the report results, the table and graphs both refresh to display the report's new data parameters.

NOTE: Although clicking in the table causes the graphs to appear to refresh, the graphs are not actually changing; there is no correlation between what you click in the table and what you see in the graphs.

By default, the report includes all Initiatives that have a measure from the PI-Dollars-Performance Improvement class. You can [filter the report](#) to include only Initiatives from certain Perspectives, Objectives, sponsors, owners, etc.

The bar chart at the top of the report has three views:

- **Trend (By Period)**– Displays cumulative data by current period and year-to-date, and the cumulative projected goal and cumulative actual savings (uses fiscal year of the current period)

- **By Group** – Displays data by the selected group (i.e., Perspective, Objective, Sponsor, Owner, Workstream, Category, Status)
- **Both** – Displays both charts at once

You select which chart to view from the Chart to View drop-down in the upper right of the report. The charts and table are explained in the following sections.

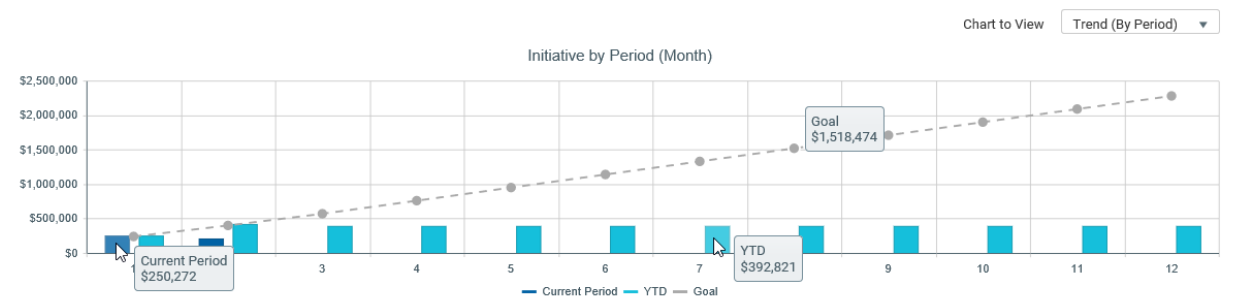
► Trend (By Period) chart

The Trend chart displays by default. The selections in the Filters panel control which cost-saving Initiatives are included in the chart.

The chart includes the entire fiscal year for the Initiatives, and displays the cumulative actual savings and the savings goal that you expect to see by the end of the year.

- The dark blue bars show the current period cumulative actual savings, which you can see when you hover your mouse over one of the bars.
- The light blue bars show Fiscal Year-to-Date (YTD) cumulative actual savings. They display for every month, even future ones, but the future ones repeat the value for the last month for which there was cumulative data; they do not change until actual data is entered for each month.
- The YTD number for a given column should equal the total of all the current period data; so if January current period data is 5 and February is 8, then the YTD for February should be 13.
- The Goal is the YTD goal, which displays as dots along the dashed line in the graph. The goal line extends to the end of the year to show what the goal is for each month. The dots indicate the savings goal for each month, and the dark blue bars displays the actual savings for each month. Hover your cursor over the dots and bars to see the values for each.
- The numbers used in the chart come from the measure(s) in the MILESTONE/MEASURES tab of each Initiative.

NOTE: The bar chart displays a sum of the data from all included Initiatives. If the data represented in the graph looks incorrect, targets may not be set for all Initiatives, or some of the Initiatives may be missing other data. Ask your system administrator to run the appropriate data utilities if you have corrected missing data and the graph still looks incorrect.



This example displays the moused-over cumulative savings for January. For each period that contains data, the light-blue year-to-date amount represents the sum of the current periods.

► By Group chart

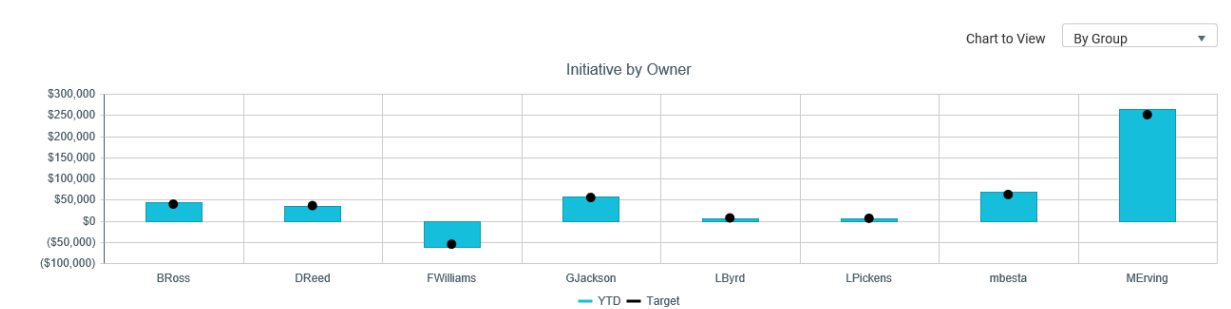
The By Group chart displays cumulative Initiative data by the group selected in the Second Chart - Group By section of the Filters panel and by either the Axiom Strategy Management Current Period or fiscal YTD.

As in the Trend chart, the dark blue bars represent cumulative current period savings for all Initiatives in the report, and the light blue bars indicate cumulative year-to-date savings.

For this chart, you can select to view only one block of time, either Current Period or fiscal Year-to-Date.

- Dots on each bar represent the savings target.
- The bar represents either the savings for the current period (dark blue) or the year-to-date savings (light blue).
- Time periods for the data come from the Axiom Strategy Management Current Period.

On the report, you can mouse over the target dots and bars to see the associated amounts.



This example displays the year-to-date cumulative Initiative savings by Initiative owner.

► Table

The report table displays a list of all filtered Initiatives, and displays the following measure data for each Initiative listed:

- Current period measure data value, year-to-date actual savings, year-to-date savings goal, project-to-date actual savings, and project-to-date goal
- From the drop-down for each Initiative:
 - Measure(s), department and entity (if specified), values for Current Period, year-to-date, year-to-date goal, Projected savings-to-date, and projected savings goal
 - Measure detail graph for each measure available from the row drop-down

ID	Initiative	Owner	Cur Per	YTD	YTD Goal	Proj to Date	Proj Goal
4	Reduce syringe costs (CM)	SDrew	\$614	\$1,592	\$1,500	\$2,583	\$2,500
12	Expansion of Medical Offices & Sports Medicine Facility (North Shore)	CSparks	\$35,000	\$70,000	\$100,000	\$70,000	\$100,000
16	Increasing Visit Volume - hold Admin expenses static	CSparks	\$11,235	\$33,580	\$30,000	\$94,780	\$90,000
17	Reduce Transcription Overtime	CSparks	\$11,002	\$33,052	\$33,000	\$98,138	\$99,000
18	Market analysis - Professional	HBurns	\$45,321	\$143,042	\$134,637	\$774,930	\$762,943
19	Constant Observer	SDrew	\$2,745	\$8,367	\$7,938	\$48,551	\$44,982
20	RN - Retirement of senior RNs with high-rate of pay	HBurns	\$17,888	\$53,940	\$53,639	\$307,467	\$303,954

Measure data is added together and presented as a single sum only if an Initiative has more than one cost-savings measure, as in the following example.

ID	Initiative	Owner	Cur Per	YTD	YTD Goal	Proj to Date	Proj Goal
392	Test MB_Z	mbesta	\$25,690	\$46,690	\$40,000	\$46,690	\$40,000
1843	PI-Dollars-Performance Improvement	0	0	\$12,345	\$22,345	\$20,000	\$20,000
1843	PI-Dollars-Performance Improvement	1	10000	\$13,345	\$24,345	\$20,000	\$20,000

This example shows an Initiative with two cost-saving measures. The values for the two measures are summed to create the total values displayed in the top Initiative row.

View the Cost Reduction Status report

This report is available to system administrators, executives, and users with Initiative permissions. For users who own or sponsor Initiatives and have no other Initiative access, the report is limited to those Initiatives the users own or sponsor. By default, executive and administrator users can view all Initiatives in the report. The Filters panel provides filtering and grouping options. For more information, see [Filtering Initiative reports](#).

The report has two main parts: graphic representations of the filtered data and a table of the filtered data.

To view the Cost Reduction Status report:

1. In the **Navigation** panel, click **Reports** to expand the menu.
2. Click **Cost Reduction Status**. The report opens on the page.

To view the charts:

In the **Chart to View** drop-down, select one of the following:

- **Trend (By Period)** – Displays measure performance data by month for the current year. This is the default display.
- **By Group** – Displays measure data by selected group (Perspective, Objective, Sponsor, Initiative Owner, Workstream, Category, Status)
- **Both** – Displays both charts at once, with the Trend chart shown above the By Group chart.

To view table data and other information:

- To view Initiative measure data, click the blue arrow icon (▶).
- To view measure detail for the measure data, click the graph icon (📊).
- To open the Initiative's plan file page, click the folder icon (📁).
- To open an Initiative's approval routing page, click the bookmark icon (🔖).

ID	Initiative	Owner	Cur Per	YTD	YTD Goal	Proj to Date	Proj Goal
▶ 4	Reduce syringe costs (CM)	SDrew	\$614	\$1,592	\$1,500	\$2,583	\$2,500
📊 866	PI-Dollars-Performance Improvement	0	\$614	\$1,592	\$1,500	\$2,583	\$2,500
▶ 12	Expansion of Medical Offices & Sports Medicine Facility (North Shore)	CSparks	\$35,000	\$70,000	\$100,000	\$70,000	\$100,000
▶ 16	Increasing Visit Volume - hold Admin expenses static	CSparks	\$11,235	\$33,580	\$30,000	\$94,780	\$90,000
▶ 17	Reduce Transcription Overtime	CSparks	\$11,002	\$33,052	\$33,000	\$98,138	\$99,000

Filtering Initiative reports

By default, the reports display all Initiatives that you have permissions to view.

For the Cost Reduction Status report, all filter options available in the Filters panel are selected by default. Use the Filter panel to filter out what you do not want to see by selecting what you want to see.

For the Initiative Status report, all records display by default but additional information is displayed when certain filters (e.g., Owner, Category, etc.) are applied. To view certain data, such as Initiative owner or sponsor, select these options in the Filter panel.

Filters


- ✓ Strategic Alignment
 - Perspective: Choose a value for Perspective. ✕
 - Objective: Choose a value for Objective. ✕
- ✓ Responsibility
 - Sponsor: Choose a value for Sponsor. ✕
 - Owner: Choose a value for Owner. ✕
- ✓ Type
 - Workstream: Choose a value for Workstream. ✕
 - Category: Choose a value for Category. ✕
- ✓ Status
 - Initiative Status: Choose a value for Status. ✕
- ✓ Second Chart - Group By (highlighted)
 - Primary Group By: Sponsor ✕
 - Current or YTD?
 - ☐ Current Period
 - ☒ YTD

Buttons: Apply, Clear All, Cancel

Callouts:

- Click the x to clear all selections in a drop-down
- This section applies to the Cost Reduction Status report only
- Click Apply after selecting or clearing options

To filter a report:

1. In the Task Bar on the left side of the page, click the filter icon ().

2. From the various drop-downs, select the items you want to include, click **OK** in the selection dialog.

NOTE: Choosing **Select All** for a specific filter, such as Perspective or Type, provides the same results as not making a selection for that filter.

- You can select more than one option from each filter group.
3. At the bottom of the **Filters** panel, click **Apply**. The report now includes only Initiatives associated with your selections.

TIP: You can click **Apply** in the Filters panel at any time during selection to see what the report looks like so far.

TIP: To quickly revert back to including all options in a selection box, click the X icon (✕) to the right of the filter option drop-down, and then click **Apply**. The report adds back the Initiatives associated with the Perspectives you filtered out.

To clear filters:

- To clear all filters, at the bottom of the **Filters** panel, click **Clear All**, and then click **Apply**. Remember that this adds all possible options back to the report.
- To clear a single filter selection, click the x icon (✕) to the right of the filter drop-down, and then click **Apply**.

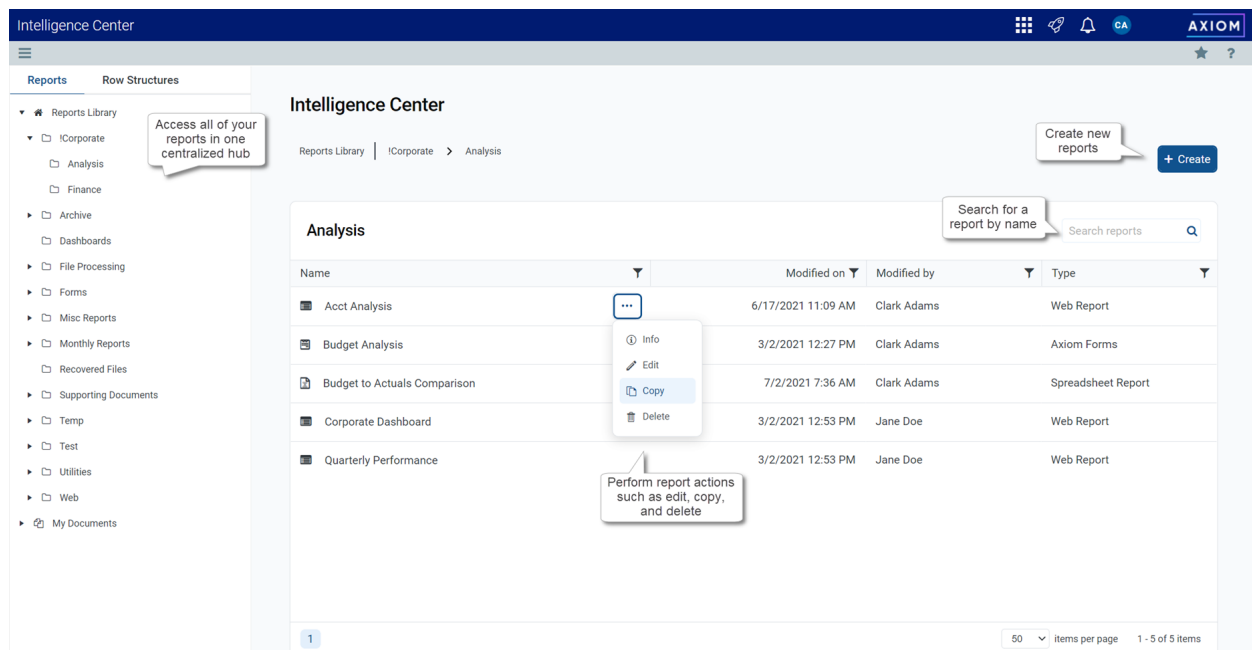


Intelligence Center

The Intelligence Center is a centralized hub where you can view any report that you have access to in the Axiom Reports Library—including web reports, Axiom forms, visualization reports, and spreadsheet reports.

Using the Intelligence Center, you can:


- View any report you have access to, regardless of the report type
- Create new web reports (all clients) and visualization reports (clients with certain product licenses)
- Open reports for editing, in the appropriate editor for the report type
- Perform other report management activities, such as creating and deleting folders, copying reports, and editing report names and descriptions

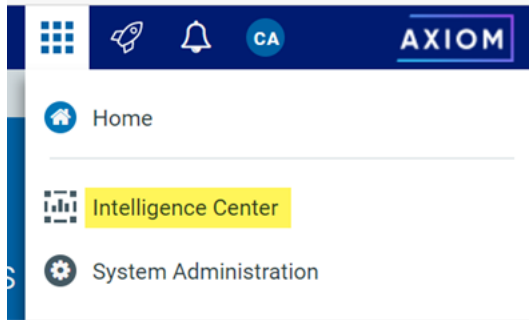


Example Intelligence Center TBD New Screenshot

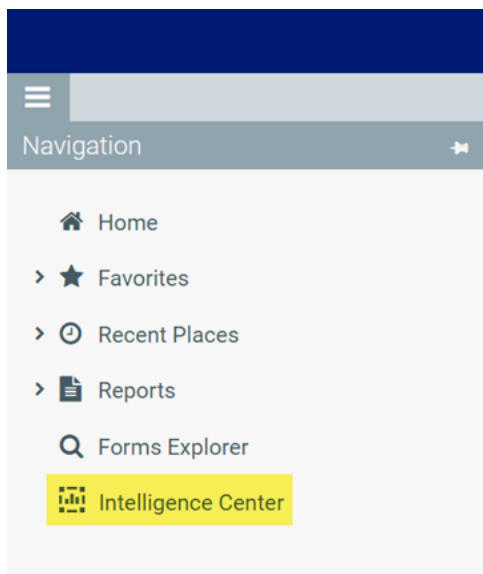
► Accessing the Intelligence Center

All users can access the Intelligence Center in the Web Client browser:

- Click the menu icon  in the Global Navigation Bar. From the Area menu, select **Intelligence Center**.

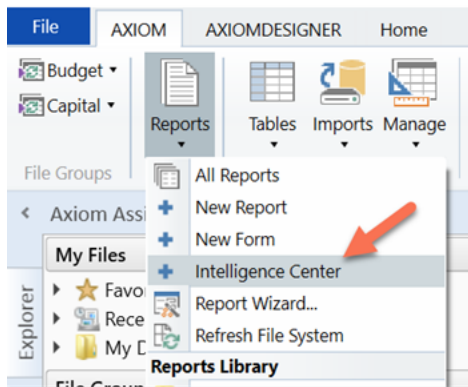


The Intelligence Center may also be accessible from other areas of the Web Client, such as in the left-hand Navigation panel, or from links in product-specific pages.



Intelligence Center in the default Navigation panel TBD New Screenshot

In the Desktop Client, you can open the Intelligence Center from the **Reports** menu. By default this menu is present on the **Axiom** tab. If your system has installed products, it may be available to you on the **Main** tab.



Intelligence Center on the default Reports menu

► Opening reports

You can open any report that displays in the Intelligence Center. The Intelligence Center is automatically filtered to only show the reports that you have access to.

To open a report from the Intelligence Center:

1. In the left-hand panel, select the **Reports** tab if it is not already selected.
2. Do one of the following to locate the report that you want to open:
 - Use the folder tree in the left-hand panel to navigate to the folder where the report is located.
 - OR
 - Use the Search box to search for the report by name.

For more information on how to search, filter, and sort the Intelligence Center, see [Intelligence Center overview](#).

3. Once the report displays in the Intelligence Center grid, click on the report name to open it.
 - Web reports open in the same browser tab.
 - Other web-enabled reports open in a new browser tab. This applies to Axiom forms, visualization reports, and deprecated web reports.
 - If the report is a spreadsheet report, Axiom Strategy Management attempts to launch the Axiom Desktop Client and open the report. This works as follows:
 - The launch routine uses the Axiom Windows Client by default.
 - If an Axiom Strategy Management client is already open, the launch routine is skipped and the report is opened in that client—regardless of whether the open client is the Excel Client or the Windows Client. Therefore, if you want to open reports in the Excel Client, you must launch the Excel Client first using the Quick Launch menu, then you can open spreadsheet reports from the Intelligence Center.

NOTE: You must have the appropriate security permissions to use the Axiom Strategy Management Desktop Client in order to open a spreadsheet report. If you do not have either the **Windows Client Access** permission or the **Excel Client Access** permission, then spreadsheet reports are hidden in the Intelligence Center because you cannot launch the client to view them.

If other types of files are present in the Reports Library—such as PDF, Word, or PowerPoint—these files can also be opened from the Intelligence Center if you have a program capable of reading the file type. Axiom Strategy Management attempts to open the file using the same routine that opens the Axiom Desktop Client.

► Creating new reports

Using the **Create** button at the top right of the Intelligence Center, you can create new reports and new fixed row structures for use in web reports. This button is context-sensitive, depending on what area you have selected from the left-hand panel.

To create a new report, select the **Reports** area from the left-hand panel, then click the **Create** button. Select one of the following:

- **Create web report:** This option opens the web Report Builder so that you can create a new web report from scratch. For more information, see [Creating new web reports](#).
- **Create web report from template:** This option creates a new web report using a template provided by an installed product. See [Creating new web reports from template](#).
- **Create new visualization:** This option creates a new visualization report. This option is only available in systems where visualization reporting is licensed and enabled.

Example Create button

To create a new fixed row structure, select the **Row Structures** area from the left-hand panel and then click **Create**. For more information, see [Creating fixed row structures](#).

► Other Intelligence Center actions

In the Intelligence Center, you can use the Actions menu to perform other report and folder management activities. To view the available actions, navigate to the item that you want to work with, then hover your cursor over the three dots icon in the right-hand side of the **Name** column. Actions are available for report files, report folders, and fixed row structures.

TBD Screenshot

The following actions are available:

Action	Description	More Information
Info	Opens an information panel for the current item, displaying the item name and description.	<ul style="list-style-type: none">• Changing folder names and descriptions• Changing report names and descriptions• Changing fixed row structure names and descriptions
Edit	Opens the current item in the appropriate editor.	<ul style="list-style-type: none">• Editing reports• Editing fixed row structures
Copy	Generates a copy of the current item. Only available for fixed row structures and web reports.	<ul style="list-style-type: none">• Copying web reports• Copying fixed row structures
Delete	Deletes the current item.	<ul style="list-style-type: none">• Deleting reports• Deleting folders• Deleting fixed row structures

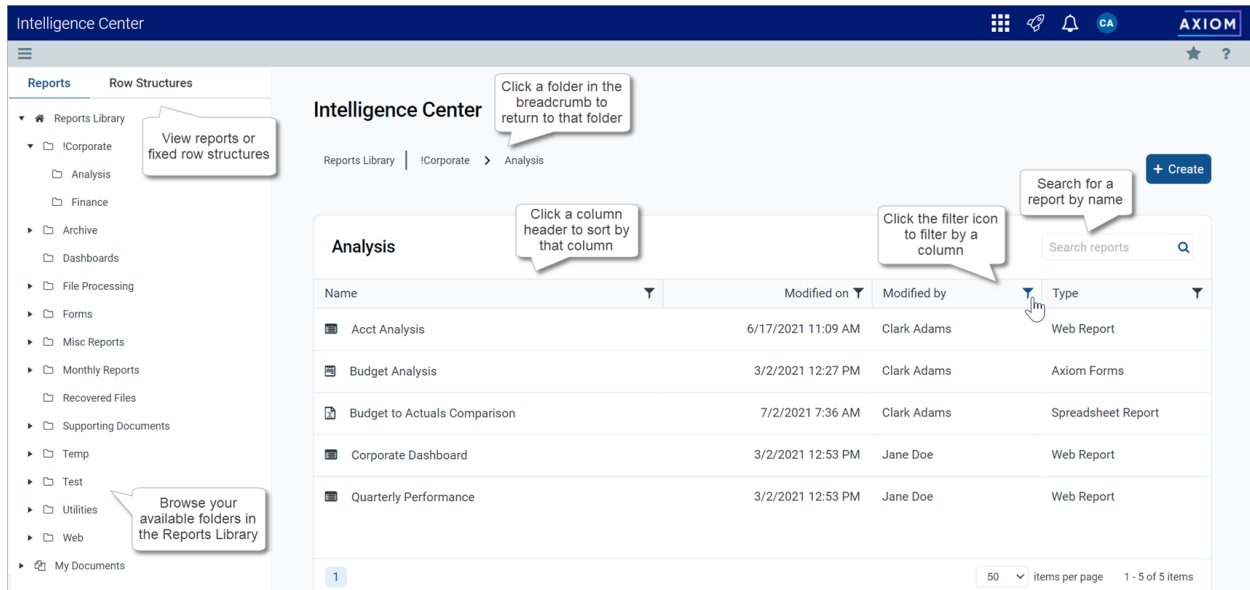
You can also [create new folders](#) by clicking the folder icon at the top right of the Intelligence Center.

Intelligence Center overview

The Intelligence Center is organized into two main areas. To view an area, select the area name from the left-hand panel:

- The **Reports** area, which contains the **Reports Library** folder tree and your **My Documents** folder (if you have access to it). You can click on folders in this section to navigate through the folder tree. Once a folder is selected, the contents of that folder display in the report grid. You can click on a subfolder name to open that subfolder, or you can click on a report name to open that report.
- The **Row Structures** section, which contains [fixed row structures](#) for use in web reports. This section does not have subfolders. You can click on the parent **Fixed Row Structures** folder to view the available fixed row structures, and click on a name to open that structure.

As you navigate, a breadcrumb displays at the top of the report grid. You can click on a folder name in the breadcrumb to move to that folder location.



Navigating the Intelligence Center

► Searching the Intelligence Center

You can use the Search box at the top right of the Intelligence Center to find a report or a fixed row structure. The search matches on name only. The search box is context-sensitive as follows:

- If the currently selected area is Reports, then the search can be used to find reports in the Reports Library and your My Documents folder.
- If the currently selected area is Row Structures, then the search can be used to find fixed row structures.

To search for an item by name:

- Type your search text into the Search box, and then click the magnifying glass or hit the Enter key to search.

The grid updates to show a list of all reports or fixed row structures that match your search text. You can open an item or perform other actions using this list. You can also filter and sort this list as described in the following sections.

To clear a search:

- Click the X icon in the right side of the Search box.

Your search text is cleared, and you are returned to the folder location that you were viewing when you started the search.

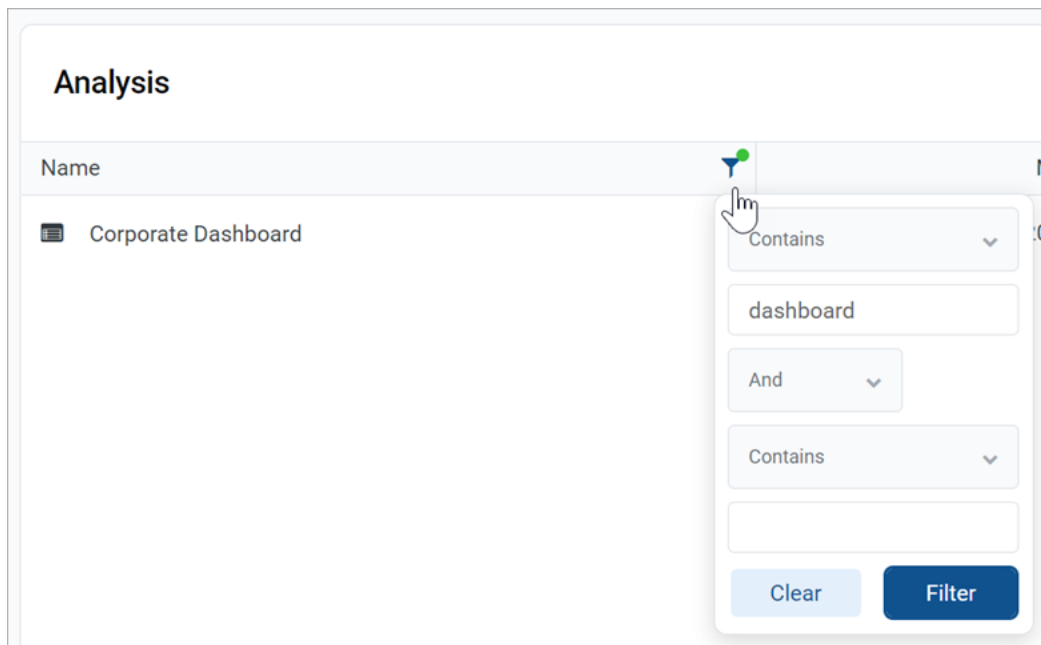
► Filtering the grid

When you are viewing a folder in the Intelligence Center (or when viewing search results), you can filter the contents by any column in the grid. For example, you can filter to show all reports of a certain type, or to show all reports created after a certain date.

To filter the grid based on a column:

1. Click the filter icon in the column header to show the filter options.
2. Set the filter options as desired. You can set up to two filter options, combined with either AND or OR.
3. Click **Filter**.

The grid updates to only show items that meet the filter. Additionally, a green dot displays by the filter icon in the column header to indicate that the grid is filtered by this column.



Example Intelligence Center column with a defined filter

If multiple columns are filtered, the filters are combined using AND—meaning the grid only shows items that match all of the filters.

The column filter is retained until you clear it, or until you navigate to a new folder location. If you have filtered the search results, clearing the search results also clears the filter.

To clear a filter:

1. Click the filter icon in the column header to show the filter options.
2. Click **Clear**.

The grid updates to clear the filter.

► Sorting the grid

When you are viewing a folder in the Intelligence Center (or when viewing search results), you can sort the list by any column in the grid.

To sort the grid by a column, click on the column header. Each click toggles between ascending sort, descending sort, and no sort. If the grid is currently sorted by a column, the sort direction is indicated by an arrow on the column header (up for ascending, down for descending).

The sort is reset when you move to a new folder location. If you have sorted the search results, clearing the search results also clears the sort.

NOTE: The grid can only be sorted by one column at a time. If you have sorted by a column and then you click the column header of a different column, the sort on the original column is cleared and replaced by the new column sort.

Managing report files in the Intelligence Center

Using the Intelligence Center, you can create, edit, copy, and delete reports in the Reports Library. You can also edit report names and descriptions.

► Creating new reports

Using the **Create** button at the top right of the Intelligence Center, you can create new reports and new fixed row structures for use in web reports. This button is context-sensitive, depending on what area you have selected from the left-hand panel.

To create a new report, select the **Reports** area from the left-hand panel, then click the **Create** button. Select one of the following:

- **Create web report:** This option opens the web Report Builder so that you can create a new web report from scratch. For more information, see [Creating new web reports](#).
- **Create web report from template:** This option creates a new web report using a template provided by an installed product. See [Creating new web reports from template](#).
- **Create new visualization:** This option creates a new visualization report. This option is only available in systems where visualization reporting is licensed and enabled.

Example Create button

To create a new fixed row structure, select the **Row Structures** area from the left-hand panel and then click **Create**. For more information, see [Creating fixed row structures](#).

Different security permissions are required to create new web reports versus visualization reports. These security requirements are noted in the relevant topics.

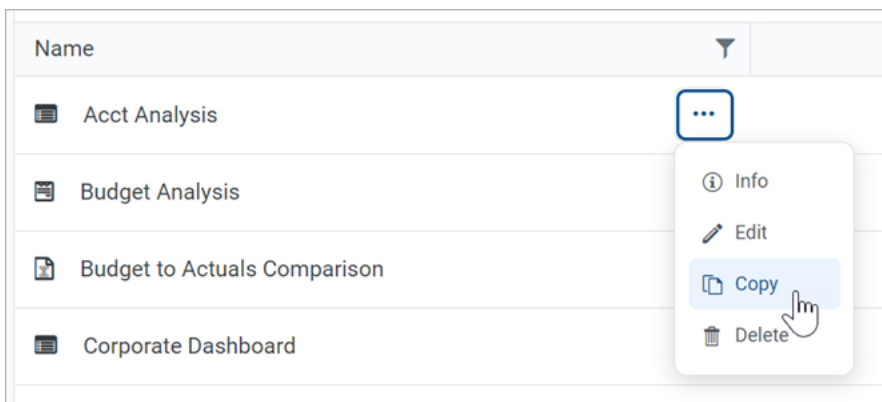
► Copying reports

In the Intelligence Center, you can copy existing reports to create new reports. Currently, this functionality is only available for web reports, and only web reports that were created in the Report Builder. Web reports created from template cannot be copied.

In order to copy a web report, you must be an administrator or have the **Create Web Reports** security permission. You must also have read/write access to the current folder, because the copy is created in the current folder.

To copy a report from the Intelligence Center:

1. In the [Intelligence Center](#), locate the web report that you want to copy. You can use folder navigation to find the report, or use the Search box at the top of the page.
2. Once the web report displays in the Intelligence Center grid, hover your cursor over the **Name** column to make the three-dots icon visible. Click the icon then select **Copy** from the menu.



If the Copy action is present but disabled, then you cannot copy this report because you do not have the appropriate security permissions.

3. In the **Copy Report** dialog, enter a name for the copy. By default, the name is **Copy of OriginalReportName**.
4. Click **OK**.

The copy is created in the current folder, with the specified name.

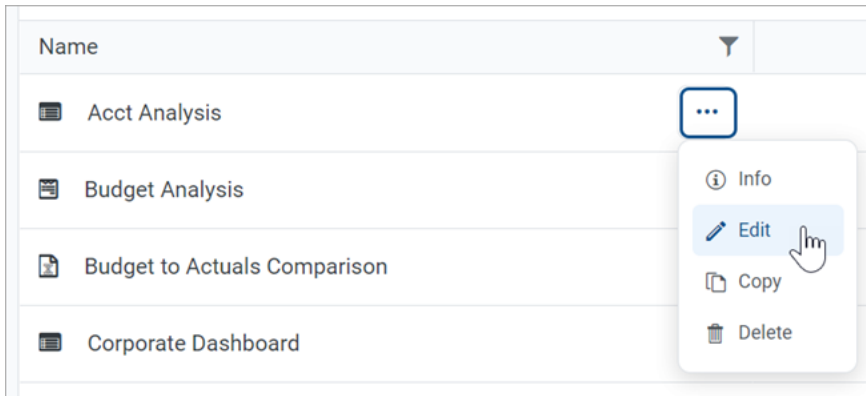
► Editing reports

You can open a report for editing from the Intelligence Center if the report is eligible to be edited, and you have read/write permissions to the report.

To edit a report from the Intelligence Center:

1. In the [Intelligence Center](#), locate the report that you want to edit. You can use folder navigation to find the report, or use the Search box at the top of the page.

2. Once the report displays in the Intelligence Center grid, hover your cursor over the **Name** column to make the three-dots icon visible. Click the icon then select **Edit** from the menu.



3. The report is opened for editing as follows, depending on its file type:
 - **Web reports** are opened in the Report Builder, in the current browser tab.
 - **Visualization reports** are opened in the Visualization Report Editor, in a new browser tab.
 - **Spreadsheet reports** and **Axiom forms** are opened in the Axiom Desktop Client, as spreadsheet report files. This works as follows:
 - The launch routine uses the Axiom Windows Client by default.
 - If an Axiom Strategy Management client is already open, the launch routine is skipped and the report is opened in that client—regardless of whether the open client is the Excel Client or the Windows Client. Therefore, if you want to open reports in the Excel Client, you must launch the Excel Client first using the Quick Launch menu, then you can open spreadsheet reports from the Intelligence Center.

NOTE: You must have the appropriate security permissions to use the Axiom Strategy Management Desktop Client in order to open a spreadsheet report. If you do not have either the **Windows Client Access** permission or the **Excel Client Access** permission, then spreadsheet reports are hidden in the Intelligence Center because you cannot launch the client to view them.

Why is the Edit action missing for some reports?

The following report types *cannot* be opened for editing from the Intelligence Center. The Edit action does not display for these files:

- **Web reports built from template:** If a web report is built from a template, the report is tied to that template and cannot be separately edited. For more information, see [Creating new web reports from template](#).
- **Deprecated web reports:** The prior implementation of web reporting is deprecated. To edit a deprecated web report, click the file name to open the report, then click the wrench icon in the toolbar to open the legacy web report editor.

- **Other non-report file types:** The Reports Library can be used to store other non-report, non-Axiom file types, such as PDF, DOC, PPT, JPG, and others. These file types cannot be edited in Axiom Strategy Management.

Why is the Edit action disabled for some reports?

If the Edit action is present but disabled, this means that although the report type is eligible to be edited, it is not possible for you to edit this particular report. One of the following reasons may apply:

- You do not have edit permissions (Read/Write access) to the file.
- The file is product-controlled and therefore cannot be edited.
- The file is configured to prevent editing (applies to certain visualization reports).

► Changing report names and descriptions

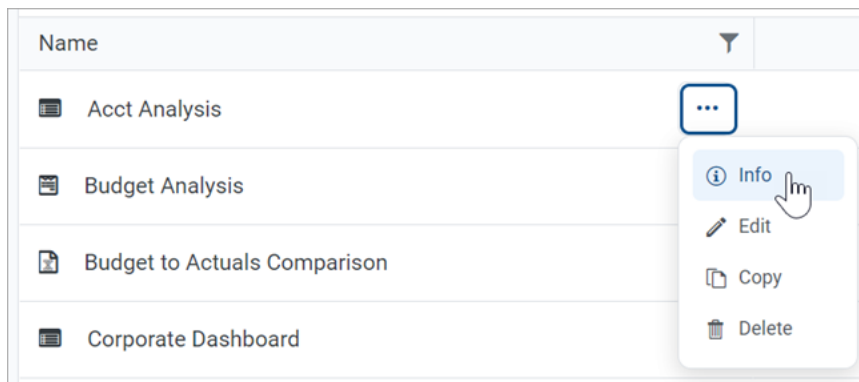
If you have read/write access to a report, then you can rename the report or change its description.

NOTES:

- In systems with installed products, the names and descriptions of product-controlled reports cannot be edited.
- If you have read/write access to a report file, but read-only access to its folder, then you cannot edit the report name.

To change a report name and/or description:

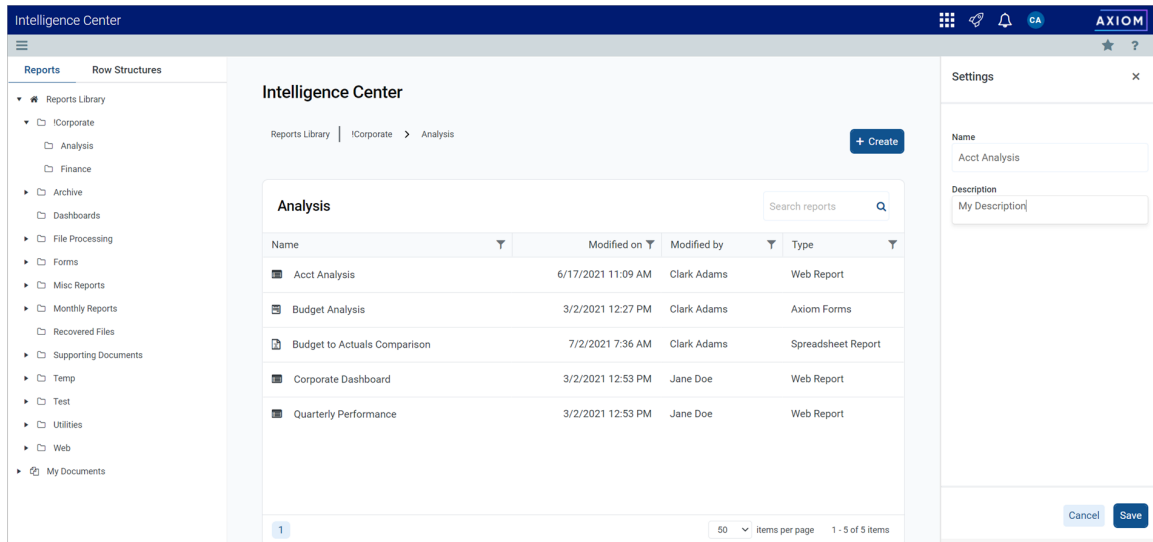
1. In the [Intelligence Center](#), locate the report that you want to edit. You can use folder navigation to find the report, or use the Search box at the top of the page.
2. Once the report displays in the Intelligence Center grid, hover your cursor over the **Name** column to make the three-dots icon visible. Click the icon then select **Info** from the menu.



The Settings panel opens along the right-hand side of the page.

3. In the Settings panel, edit the report **Name** or **Description** as needed, then click **Save**.

The name can be up to 250 characters, and the description can be up to 2000 characters.



Example Settings panel

If the report name and description cannot be edited, then the **Apply** button is not available. This may occur because you do not have the necessary permissions, or because the report belongs to an installed product.

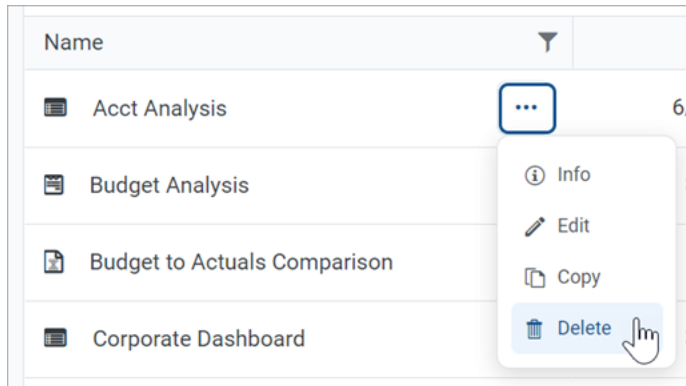
► Deleting reports

If a report is no longer needed, you can delete it using the Intelligence Center. In order to delete a report (or any other file that resides in the Reports Library), you must have read-write access to the file and to the folder it resides in.

NOTE: In systems with installed products, product-controlled reports cannot be deleted.

To delete a report:

1. In the [Intelligence Center](#), locate the report that you want to delete. You can use folder navigation to find the report, or use the Search box at the top of the page.
2. Hover your cursor over the row with the report, hover your cursor over the **Name** column to make the three-dots icon visible. Click the icon then select **Delete** from the menu.



If the report cannot be deleted, the Delete action is disabled. This may occur because you do not have the necessary permissions to delete the report, or because the report belongs to an installed product.

3. When you are prompted to confirm that you want to delete the report, click **OK**.

The report is deleted from the system and no longer displays in the Intelligence Center. If the report was deleted in error, an administrator may be able to restore the report using the **Restore Deleted Files** feature in the Desktop Client.

Managing folders in the Intelligence Center

Using the Intelligence Center, you can create, rename, and delete folders in the Reports Library.

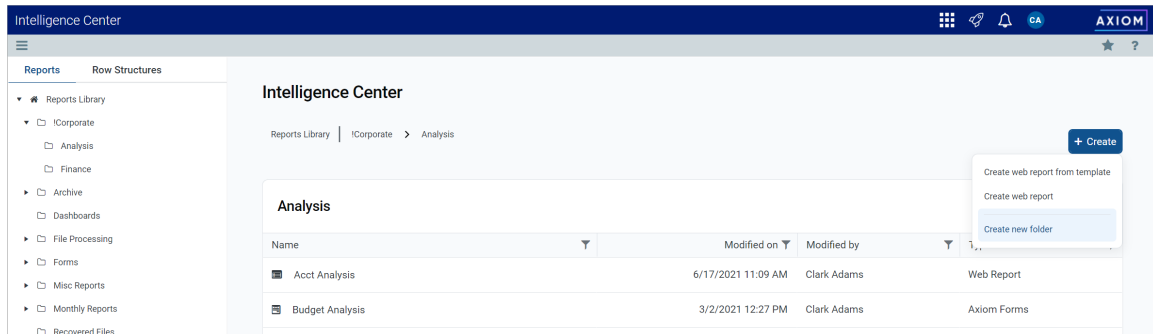
► Creating new folders

You can create new folders as needed in the Intelligence Center. In order to create a folder, you must have read-write access to the parent folder.

To create a folder:

1. In the [Intelligence Center](#), navigate to the folder location where you want to create a new folder.

For example, if you want to create a new top-level folder in the Reports Library, select the Reports Library. If you want to create a new subfolder within a folder, then select that folder.
2. Click **Create > Create new folder**.



3. In the **Create new folder** dialog, enter a name for the new folder, then click **OK**.

The new folder is created in the current location.

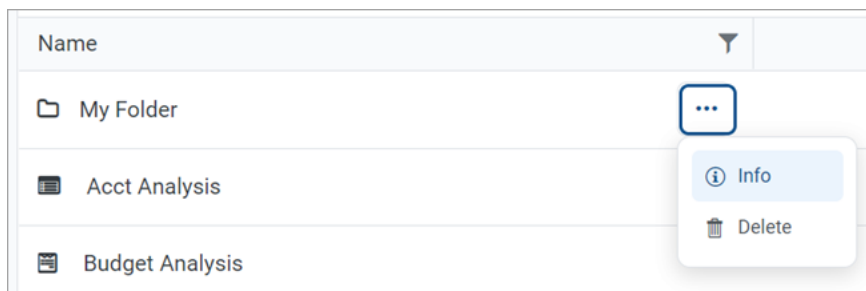
► Changing folder names and descriptions

If you have read/write access to a folder, then you can rename the folder or change its description.

NOTE: In systems with installed products, the names and descriptions of product-controlled folders cannot be edited.

To change a folder name and/or description:

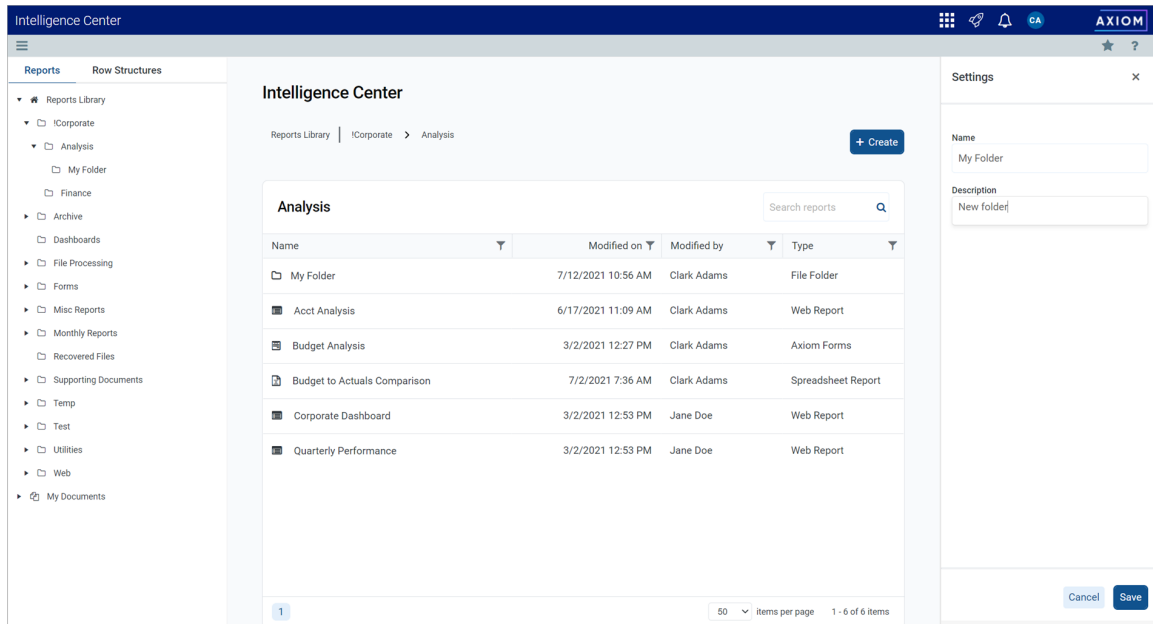
1. In the [Intelligence Center](#), navigate to the parent folder of the folder that you want to rename, so that the folder you want to rename displays in the Intelligence Center grid.
2. Hover your cursor over the row with the folder, so that the three dots icon is visible the **Name** column. Click the icon then select **Info** from the menu.



The Settings panel opens along the right-hand side of the page.

3. In the Settings panel, edit the folder **Name** or **Description** as needed, then click **Apply**.

The name can be up to 250 characters, and the description can be up to 2000 characters.



Example Settings panel

If the folder name and description cannot be edited, then the **Apply** button is not available. This may occur because you do not have the necessary permissions, or because the folder belongs to an installed product.

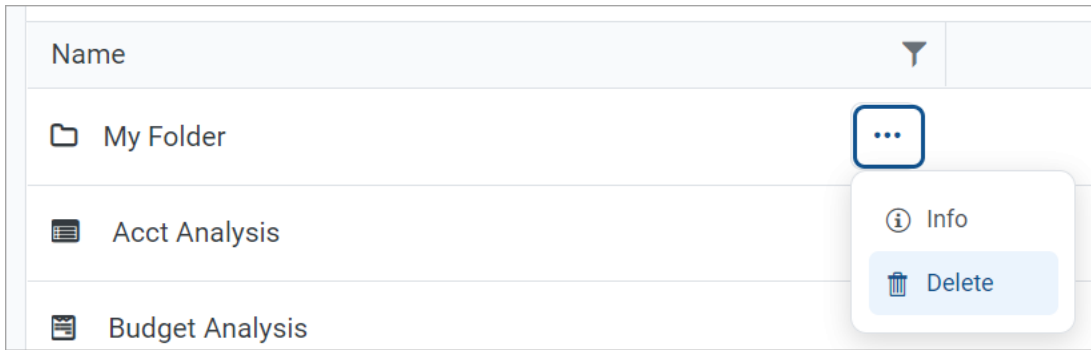
► Deleting folders

If a folder is no longer needed, you can delete it using the Intelligence Center. In order to delete a folder, the folder must be empty and you must have read-write access to the folder.

NOTE: In systems with installed products, product-controlled folders cannot be deleted.

To delete a folder:

1. In the [Intelligence Center](#), navigate to the parent folder of the folder that you want to delete, so that the folder you want to delete displays in the Intelligence Center grid.
2. Hover your cursor over the row with the folder, so that the three dots icon is visible the **Name** column. Click the icon then select **Delete** from the menu.



If the folder cannot be deleted, the Delete action is disabled. This may occur because you do not have the necessary permissions to delete the folder, or because the folder belongs to an installed product.

The folder is deleted from the system and no longer displays in the Intelligence Center. There is no confirmation dialog before deleting an empty folder. If the empty folder was deleted in error, you can create a new folder with the same name.

Web Reports

Axiom web reports provide a fully browser-based reporting option for Axiom Strategy Management data. You can create, edit, and view web reports all within the Axiom Strategy Management Web Client.

Web reports are designed to be intuitive for report designers to build, and easy for report viewers to use. The [Intelligence Center](#) provides a centralized hub to create new web reports and to view any report that you have access to.

Web reports support two different ways to display reporting data in a grid:

- **Dynamic rows:** Dynamically display data rows based on a specified dimension or grouping.
- **Fixed rows:** Use predefined fixed row structures to organize data rows into sections with headers, totals, and subtotals.

Web reports can be created from scratch using the Report Builder, or you can create them from templates provided by installed Axiom Strategy Management products.

Managing Web Reports

Using the Intelligence Center in the Axiom Strategy Management Web Client, you can create, edit, copy, and delete web reports as needed. Web reports are designed to be intuitive for report builders to create, and easy for end users to consume.

► Creating new web reports

To create a new web report, select the **Reports** area from the left-hand panel of the Intelligence Center, then click **Create**. From the Create menu, select one of the following:

- [New web report](#): This option opens the Report Builder so that you can create a new web report from scratch.
- [New web report from template](#): This option creates a new web report based on a template provided by an installed product.

If you want to create a web report that uses a fixed row structure, the fixed row structure must be defined separately and then assigned to the report. Using the Intelligence Center, you can create, edit, and delete fixed row structures. For more information, see [Managing Fixed Row Structures](#).

In order to create a web report, you must be an administrator or have the **Create Web Reports** security permission. You must also have read/write access to at least one folder in the Reports Library.

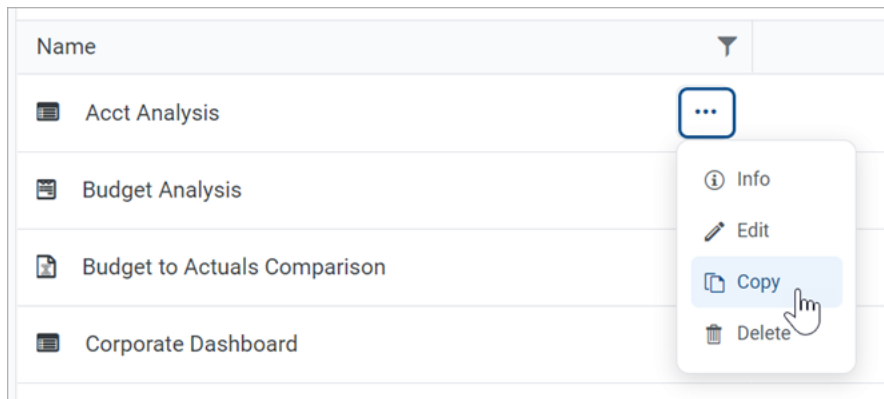
► Copying web reports

In the Intelligence Center, you can copy existing web reports to create new reports. In order to copy a web report, you must be an administrator or have the **Create Web Reports** security permission. You must also have read/write access to the current folder, because the copy is created in the current folder.

NOTE: Only web reports created in the Report Builder can be copied. Web reports created from template cannot be copied.

To copy a web report from the Intelligence Center:

1. In the [Intelligence Center](#), locate the web report that you want to copy. You can use folder navigation to find the report, or use the Search box at the top of the page.
2. Once the web report displays in the Intelligence Center grid, hover your cursor over the **Name** column to make the three-dots icon visible. Click the icon then select **Copy** from the menu.



If the Copy action is present but disabled, then you cannot copy this report because you do not have the appropriate security permissions.

3. In the **Copy Report** dialog, enter a name for the copy. By default, the name is **Copy of OriginalReportName**.
4. Click **OK**.

The copy is created in the current folder, with the specified name. If you want to save a copy in a different folder, then you can **Edit** the report instead and use **Save As** within the [Report Builder](#).

TIP: You can also copy a web report in the Desktop Client, using Axiom Explorer or the Explorer task pane.

▶ Editing web reports

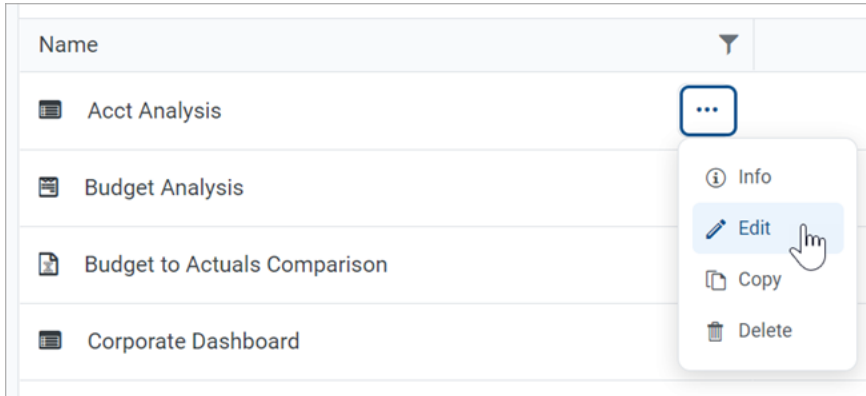
You can open a web report for editing from the Intelligence Center if the report is eligible to be edited, and you have read/write permission to the report.

NOTE: Only web reports created in the Report Builder can be edited. Web reports created from template cannot be edited.

Only one user at a time can open a web report for editing in the Report Builder. However, other users can continue to view the report as normal.

To edit a web report from the Intelligence Center:

1. In the [Intelligence Center](#), locate the web report that you want to edit. You can use folder navigation to find the report, or use the Search box at the top of the page.
2. Once the web report displays in the Intelligence Center grid, hover your cursor over the **Name** column to make the three dots icon visible. Click the icon then select **Edit** from the menu.



If the Edit action is present but disabled, then you cannot edit this report. This may be because the report belongs to an installed product and cannot be edited, or because you do not have read/write access to the report, or because the report was created from template.

The report opens in the Report Builder, in the current browser tab. You can now edit it as needed. For more information, see [Using the Report Builder](#).

► Changing web report names and descriptions

If you have read/write access to a web report, then you can rename the report or change its description.

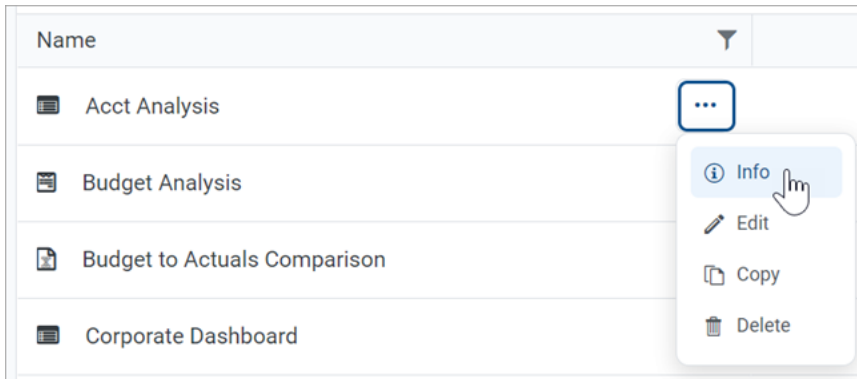
NOTES:

- In systems with installed products, the names and descriptions of product-controlled reports cannot be edited.
- If you have read/write access to a report file, but read-only access to its folder, then you cannot edit the name or description.

To change a web report name and/or description:

1. In the [Intelligence Center](#), locate the web report that you want to edit. You can use folder navigation to find the report, or use the Search box at the top of the page.

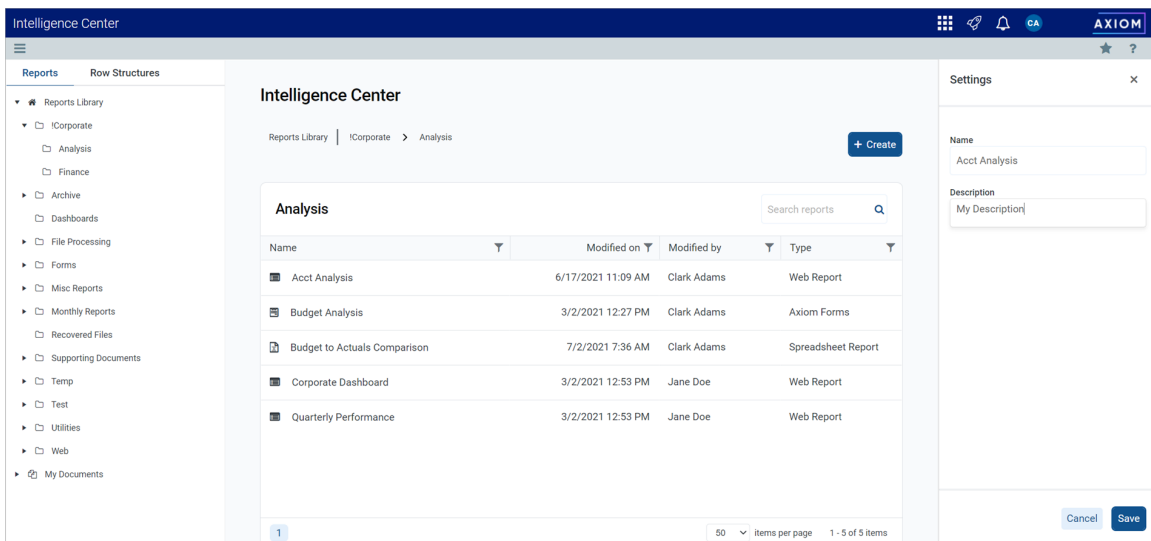
2. Once the web report displays in the Intelligence Center grid, hover your cursor over the **Name** column to make the three-dots icon visible. Click the icon then select **Info** from the menu.



The Settings panel opens along the right-hand side of the page.

3. In the Settings panel, edit the web report **Name** or **Description** as needed, then click **Apply**.

The name can be up to 250 characters, and the description can be up to 2000 characters.



Example Settings panel

If the web report name and description cannot be edited, then the **Apply** button is not available. This may occur because you do not have the necessary permissions, or because the report belongs to an installed product.

▶ Deleting web reports

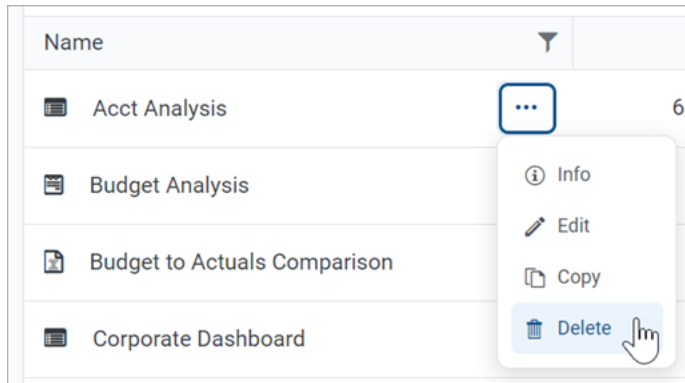
You can delete a client-created web report if it is no longer needed. You must have read/write access to the report and its folder in order to delete a report. Product-controlled web reports cannot be deleted.

Reports can be deleted from the Intelligence Center in the Axiom Strategy Management Web Client, or from Axiom Strategy Management Explorer in the Axiom Desktop Client.

TIP: If a report is deleted in error, an administrator may be able to restore the report using the **Restore Deleted Files** feature in the Axiom Desktop Client.

To delete a web report from the Intelligence Center:

1. In the [Intelligence Center](#), locate the web report that you want to delete. You can use folder navigation to find the report, or use the Search box at the top of the page.
2. Once the web report displays in the Intelligence Center grid, hover your cursor over the **Name** column to make the three-dots icon visible. Click the icon then select **Delete** from the menu.



If the report cannot be deleted, the Delete action is disabled. This may occur because you do not have the necessary permissions to delete the report, or because the report belongs to an installed product.

3. When you are prompted to confirm that you want to delete the report, click **OK**.

The report is deleted from the system and no longer displays in the Intelligence Center.

To delete a web report from Axiom Explorer:

1. Launch the Desktop Client.
2. On the **Axiom** tab, in the **Administration** group, click **Manage > Axiom Explorer**.

NOTE: If your system uses installed Axiom products, you can access this feature from the **Admin** tab. Click **System Browser** to open Axiom Explorer.

TIP: You can also use the Explorer task pane to delete a web report.

3. Navigate to the **Reports Library**, and then locate the web report that you want to delete.
4. Right-click the report and then select **Delete**.
5. When you are prompted to confirm that you want to delete the report, click **Yes**.

The report is deleted from the system and no longer displays in Axiom Explorer.

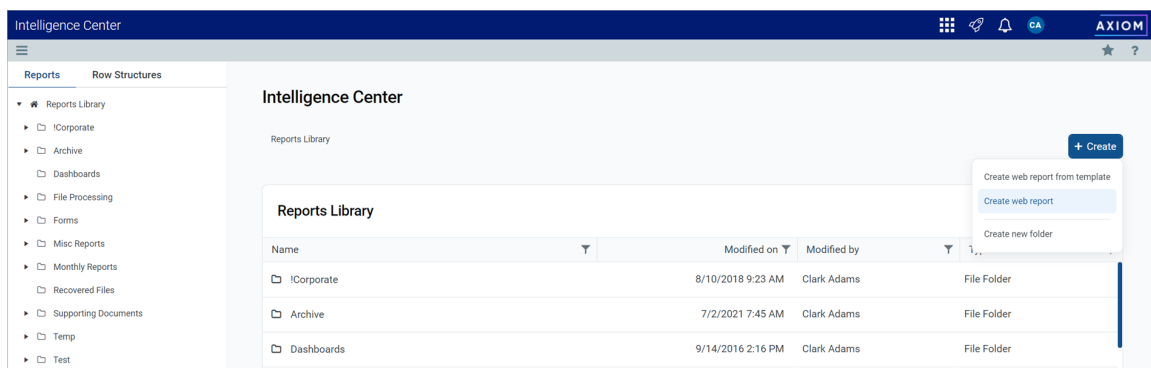
Creating new web reports

Using the Intelligence Center, you can create new web reports from scratch so that you can build the report as needed.

In order to create a web report, you must be an administrator or have the **Create Web Reports** security permission. In order to save the new report you must have read/write access to at least one folder in the Reports Library or access to the My Documents folder. If you do not have permission to create web reports, then the option to create a new web report will not be available from the **Create** button in the Intelligence Center.

To create a new web report:

1. In the [Intelligence Center](#), click **Create > Create web report**.



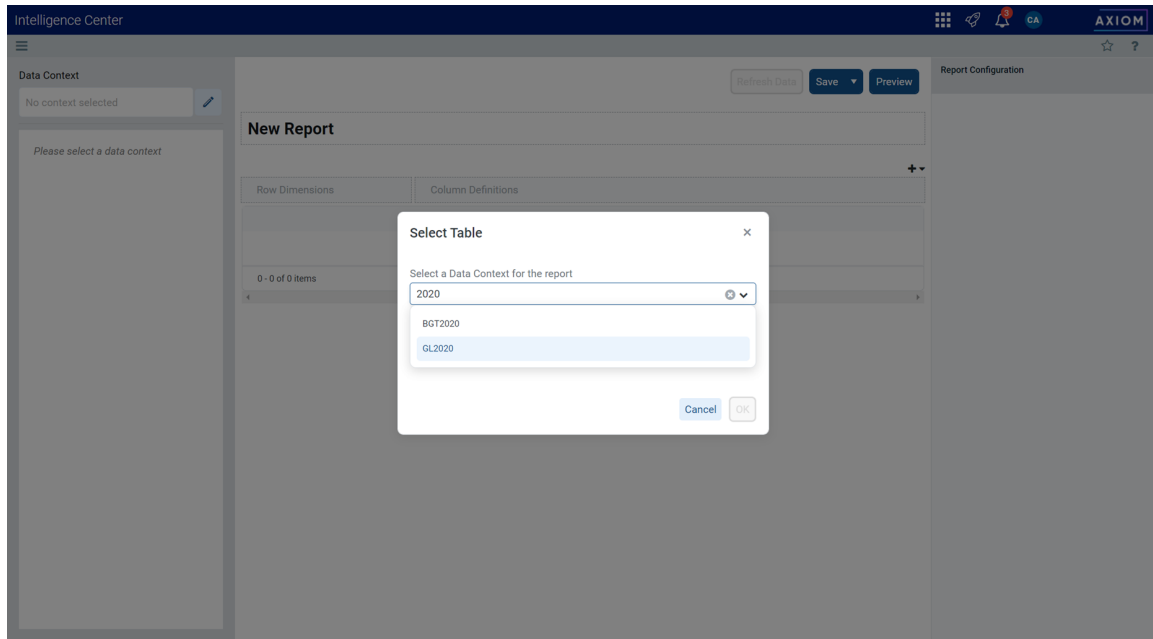
NOTE: The **Reports** area must be selected in the left-hand panel of the Intelligence Center in order to create a new web report.

The Report Builder opens in the current browser tab, displaying a new blank report.

2. In the **Select Table** dialog, select a primary table to determine the data context for the report, then click **OK**.

The *data context* determines the overall pool of data that is eligible to be included in the report. The selected primary table determines which other tables are eligible for inclusion in the report, based on lookup relationships and shared dimensions. All table columns and filters used in the report must be compatible in the context of the primary table.

You can select a table from the drop-down list directly, or type into the box to search for a table name. The search uses "contains" matching to return any tables that contain the search text within the table name. Tables that start with the search text are listed first, followed by tables that contain the search text anywhere in the table name. In the following screenshot, the text **2020** has been used to search for tables with the year 2020 in the name.



Selecting a primary table for the data context

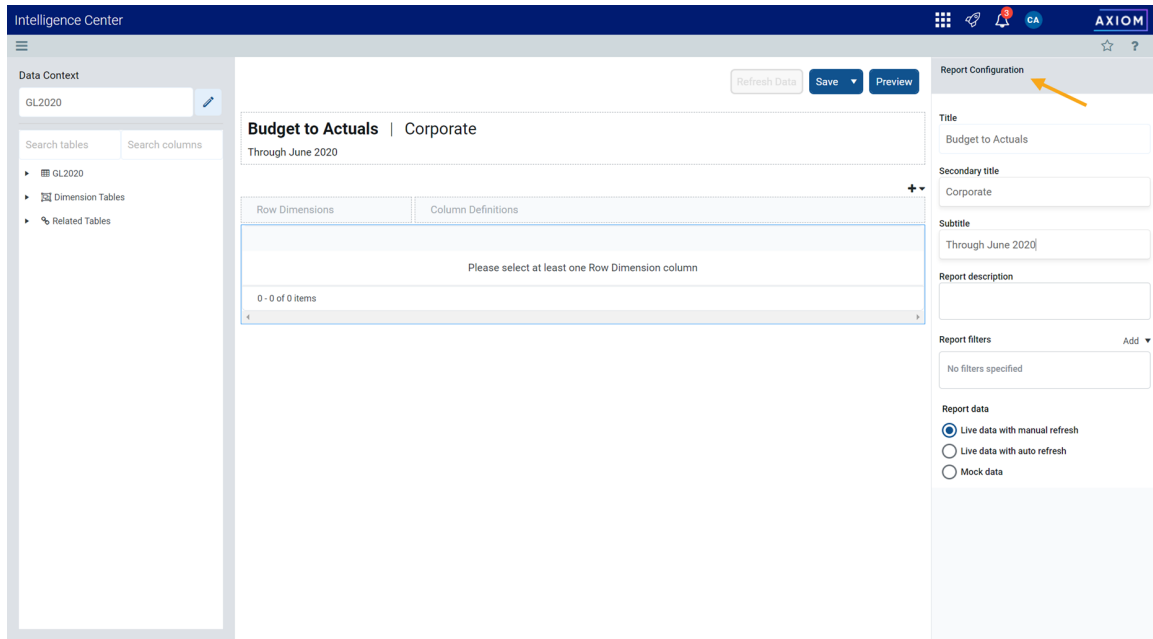
Although you can click **Cancel** at this point, most activities in the Report Builder require a data context to be selected.

Once a table is selected for the data context, you can work with the report in the Report Builder. The Report Builder consists of three main areas as follows:

- The **Data Panel** on the left side is where you select the data to include in your report.
- The **Report Canvas** in the middle is where you build the report. Columns can be dragged and dropped from the Data Panel to the Report Canvas. You can also create calculations to display in the report columns, and define column groups.
- The **Configuration Panel** on the right side is where you define properties for the report, the data grid, and the individual columns. You can configure properties such as report titles, drilling and filtering options, and column formatting.

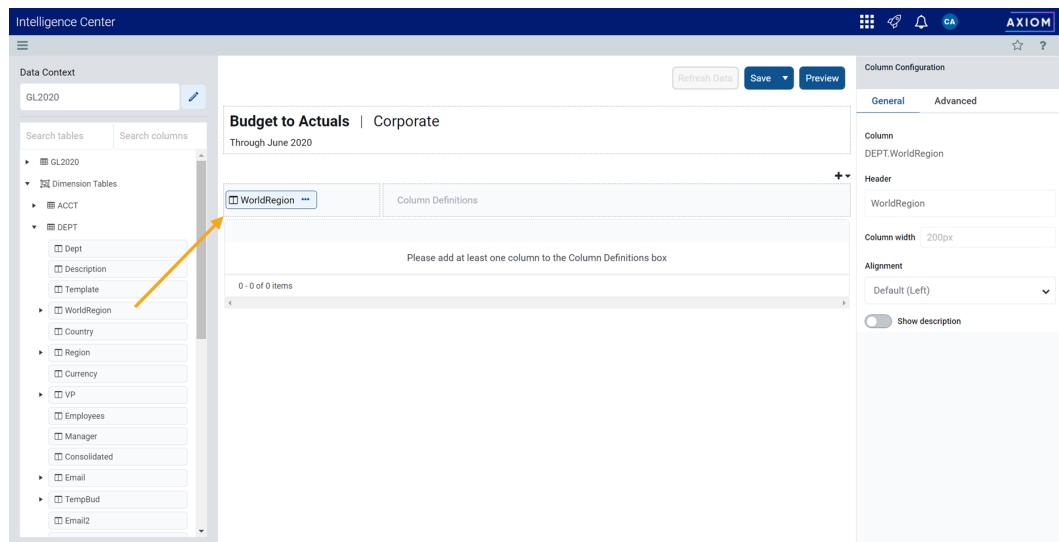
For more information on using the Report Builder, see [Using the Report Builder](#).

3. In the **Report Configuration** panel along the right side of the page, define the report titles and description as needed. For more information, see [Defining report titles and description for a web report](#).



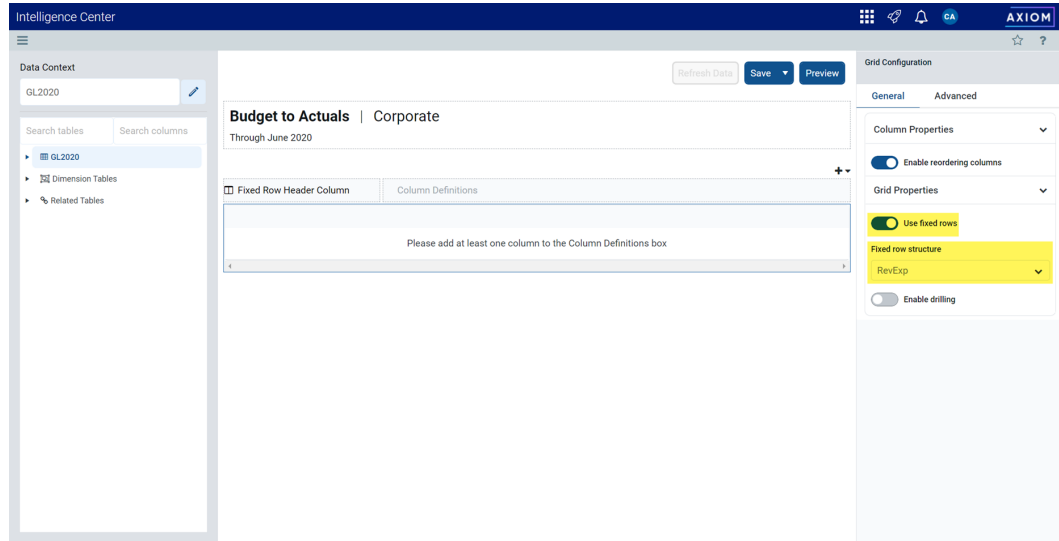
Defining titles for the report

4. Define the rows of the report by doing one of the following, depending on whether you want to generate the rows dynamically or use a fixed row structure:
 - **Dynamic rows:** In the Data Panel, locate the table column that you want to use as the row dimension. Drag and drop the column to the **Row Dimensions** box in the Report Canvas. For more information, see [Specifying the row dimension for a web report](#).



Dragging and dropping a column to use as the row dimension

- **Fixed rows:** Select the grid placeholder text in the Report Canvas so that the **Grid Configuration** properties load into the Configuration Panel. On the **General** tab, enable **Use fixed rows** then select an existing **Fixed row structure**. For more information, see [Specifying the fixed row structure for a web report](#).



Specifying a fixed row structure to define the rows

5. Use the Data Panel to locate the data columns that you want to display in the report, then drag and drop those columns out to the **Column Definitions** box in the Report Canvas. Once the columns are added to the grid, you can configure data and display properties for each column.

For more information, see [Adding data columns and calculated columns to a web report](#) and [Configuring column properties for a web report](#).

Intelligence Center

GL2020

Search tables Search columns

BGT2020

ACCT

DEPT

DETAIL

M1

M2

M3

M4

M5

M6

M7

M8

M9

M10

M11

M12

SaveTagDocID

SaveTag

CYAYTDVerification

Refresh Data Save Preview

Budget to Actuals | Corporate

Through June 2020

WorldRegion Q1 Actuals Q2 Actuals Q1 Budget Q2 Budget

WorldRegion	Q1 Actuals	Q2 Actuals	Q1 Budget	Q2 Budget
Asia	\$59,064,980	\$58,174,791	\$33,016,385	\$34,789,159
Corporate	\$11,784,872	\$7,370,832	\$6,005,599	\$6,195,873
Europe	\$30,700,879	\$30,422,551	\$1,311,221	\$1,332,025
North America	\$760,941,761	\$750,385,484	\$153,873,112	\$139,542,480

1 - 4 of 4 items

Column Configuration

General Advanced

Column

BGT2020 Q2

Header

Q2 Budget

Column width 120px

Alignment

Default (Right)

Number format

Default (Currency)

Aggregation

Default (Sum)

Data filter

No filters defined

Enable filter

Hide column

Click on a column name to configure it

Drag columns from the Data Panel to the Column Definitions box

Adding and configuring data columns

NOTE: To populate the grid with data after adding columns to the Column Definitions box, click the **Refresh Data** button. By default, the Report Builder uses live data, but you must manually refresh in order to see the result of any data changes. For more information, see [Changing data display options for the Report Builder](#).

6. Select the grid in the report canvas so that the configuration panel changes to show the **Grid Configuration** settings. Define the grid settings as needed, such as to enable the total row or enable drilling options. For more information, see [Configuring grid properties in a web report](#).

In the following example, the total row was enabled for the grid.

Budget to Actuals | Corporate
Through June 2020

WorldRegion	Q1 Actuals	Q2 Actuals	Q1 Budget	Q2 Budget
Asia	\$59,064,980	\$58,174,791	\$33,016,385	\$34,789,159
Corporate	\$11,784,872	\$7,370,832	\$6,005,599	\$6,195,873
Europe	\$30,700,879	\$30,422,551	\$1,311,221	\$1,332,025
North America	\$760,941,761	\$750,385,484	\$153,873,112	\$139,542,480
	\$862,492,492	\$846,353,658	\$194,206,317	\$181,859,537

1 - 4 of 4 items

Click the grid area to load the grid configuration properties

Configuring grid properties

- Click the report titles to re-load the Report Configuration properties, then define report-level filters as needed to limit the data shown in the report. For more information, see [Defining report-level data filters for a web report](#).

In the following example, a general filter was added to exclude the Corporate world region value from the report and to only show data for revenue accounts.

Budget to Actuals | Corporate
Through June 2020

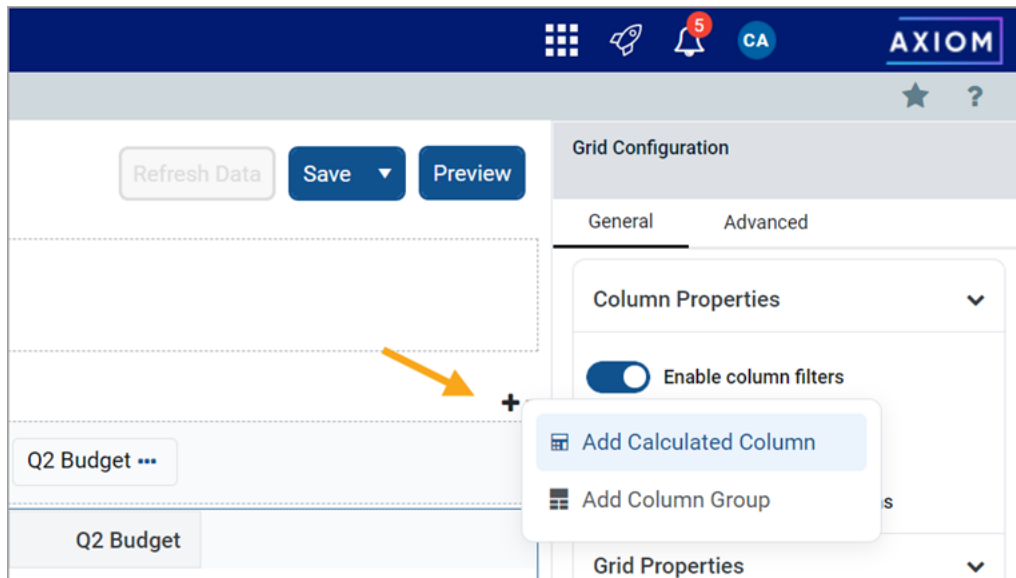
WorldRegion	Q1 Actuals	Q2 Actuals	Q1 Budget	Q2 Budget
Asia	\$6,989,316	\$5,939,730	\$5,416,397	\$5,334,331
Europe	\$473,158	\$389,618	\$340,531	\$335,371
North America	\$32,766,656	\$26,180,604	\$35,609,235	\$35,068,189
	\$40,229,130	\$32,509,952	\$41,366,163	\$40,737,891

1 - 3 of 3 items

Click the grid area to load the grid configuration properties

Defining a report-level filter to limit data in the report

8. Use the plus icon at the top right of the **Column Definitions** box to add calculated columns to the grid as needed. For more information, see [Adding data columns and calculated columns to a web report](#).



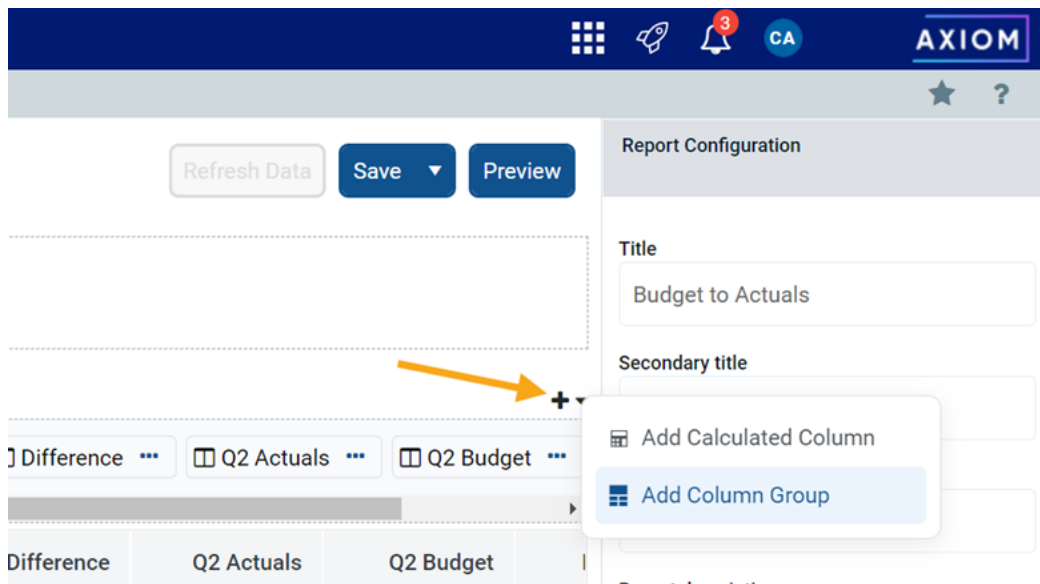
Click the plus icon to add a calculated column

In the following example, two calculated columns have been added to calculate the difference between actuals and budget for each quarter.

WorldRegion	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget
Asia	\$6,989,316	\$5,416,397	29.04%	\$5,939,730	\$5,334,331
Europe	\$473,158	\$340,531	38.95%	\$389,618	\$335,371
North America	\$32,766,656	\$35,609,235	-7.98%	\$26,180,604	\$35,068,189
	\$40,229,130	\$41,366,163	-2.75%	\$32,509,952	\$40,737,891

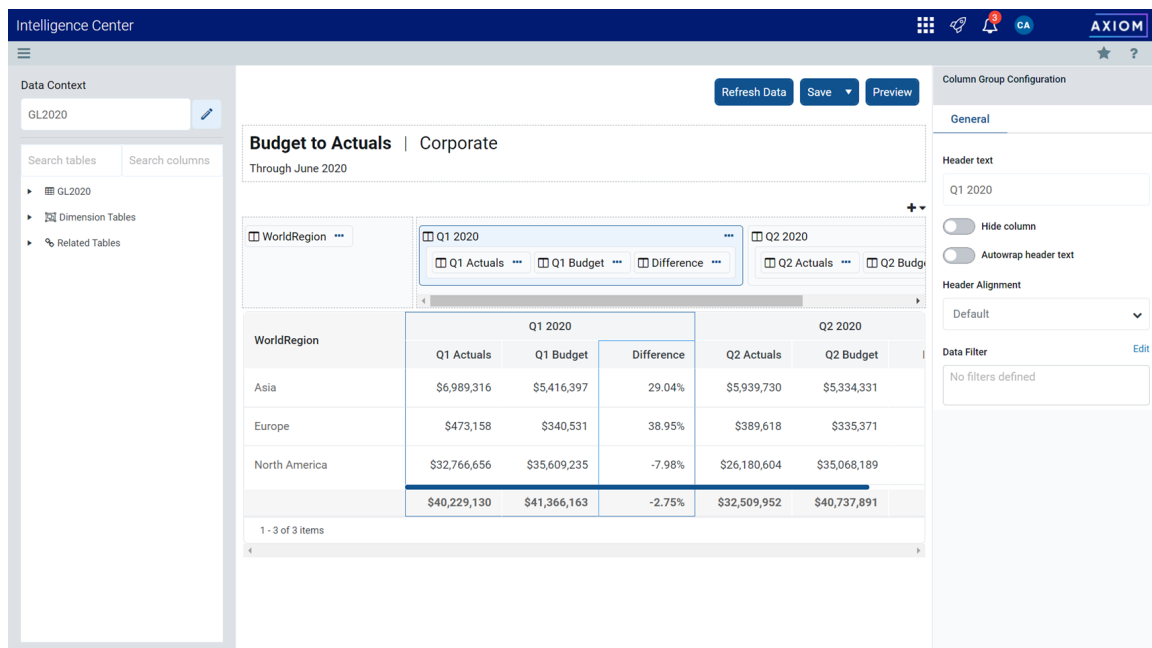
Adding and configuring calculated columns

- Use the plus icon at the top right of the **Column Definitions** box to add column groups to the grid as needed. Using column groups, you can display multiple columns grouped underneath a header. For more information, see [Defining column groups for a web report](#).




Click the plus icon to add a column group

In the following example, two column groups have been added for Q1 and Q2.



Adding and configuring column groups

- Click **Save** to save the report.
- In the **Save Report As** dialog, complete the following fields and then click **Save**:

Item	Description
File name	The name of the report file. This is the name that users will see in the Intelligence Center.
Description	Optional. A description of the report. Currently, descriptions do not display in the Intelligence Center, but they can be viewed in the Axiom Strategy Management Desktop Client using Axiom Explorer.
Save to folder	<p>The folder in the Axiom repository where you want to save the report.</p> <ul style="list-style-type: none"> Click the folder icon  to the right of the field. In the Choose output folder dialog, select a folder in the Reports Library. You can only select folders where you have read/write access to the folder. If a folder name displays with a lock icon, this means you have read-only access to that folder and therefore cannot save a new report there. <p>NOTE: If you have access to the My Documents folder, then you can also save reports to that location for your personal use.</p> <ul style="list-style-type: none"> Click OK to choose the folder and return to the save dialog. <p>The path to your selected folder now displays in the field.</p>

If you use a file name that already exists in the target folder, you will be prompted to choose whether or not to overwrite the existing file. If you choose not to overwrite, you are returned to the Save Report As dialog so that you can use a different name and/or output folder.

Keep in mind that many of these steps can be done in any order. You can configure the grid settings before defining report titles, and so on. The main dependency is that you must select a primary table for the data context before you can begin adding columns to the report.

Creating new web reports from template

Using the Intelligence Center, you can create new web reports from a template. Currently, templates are only provided by installed Axiom Strategy Management products. For more information about any templates provided by your installed products, see the separate product documentation.

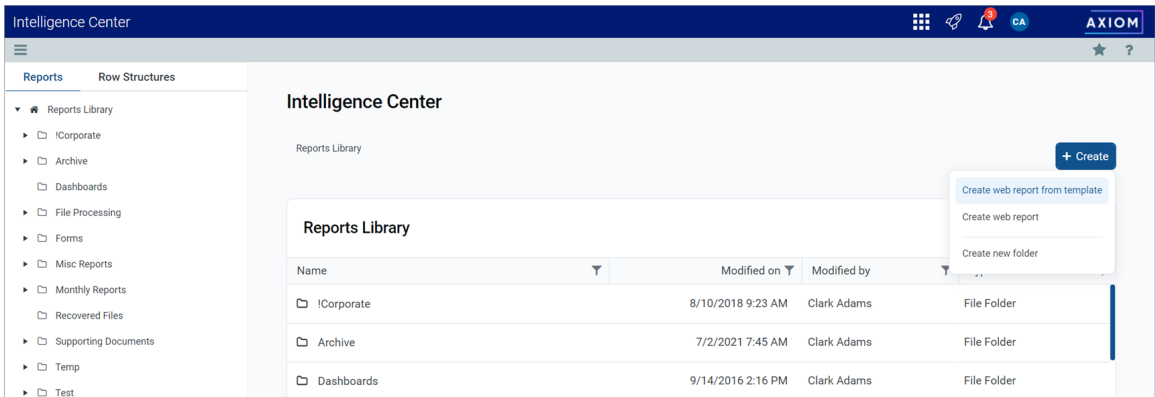
Some report templates require a fixed row structure to define the row dimensions and sections of the report. If you want to create a new web report from a template that requires a fixed row structure, this row structure must already exist so that you can assign it to the report when you create it. For more information, see [Managing Fixed Row Structures](#).

Web reports created from template remain linked to that template. If a template changes, that change is automatically available in all reports created from that template.

In order to create a web report, you must be an administrator or have the **Create Web Reports** security permission. In order to save the new report you must have read/write access to at least one folder in the Reports Library or access to the My Documents folder. If you do not have permission to create web reports, then the option to create a new web report from template will not be available from the **Create** button in the Intelligence Center.

To create a new web report from template:

1. In the [Intelligence Center](#), click **Create > Create web report from template**.



NOTE: If your system does not have any product-delivered templates available, then this option will not be present on the **Create** menu.

The **Create New Web Report from Template** dialog opens to walk you through the report creation process.

2. On the template screen, select the template that you want to use to create the report, and then click **Next**.

Create New Web Report from Template

×

Select a template

Template name	Created on
Balance Sheet Validation Report	
Budget Balance Sheet Trend	
Budget Comparative Income Statement	
Budget Consolidating Balance Sheet	
Budget Income Statement Trend	
Budget Yield Trend	
Cash Flow Forecaster Log Report	
Cash Flow Forecaster Log Report Instrument Detail	
Comparative Balance Sheet	
Comparative Income Statement	
Consolidating Balance Sheet	
Consolidating Income Statement	

Example template screen showing product-delivered templates

- On the fixed row structure screen, select the fixed row structure to use in the report, and then click **Next**. If the template you selected does not use a fixed row structure, then this screen does not display and you can skip to step 4.

Create New Web Report from Template

×

Select a fixed row structure

Fixed row structure name	Created on
PM Test Yield with NIM V2	
Contribution Statement	
Statement of Earnings	
Balance Sheet V1	
Summary Balance Sheet	
Operating Expenses	
Student	
Balance Sheet Trend Validation	

BACK

NEXT


CANCEL

Example screen showing fixed row structures

NOTE: If no fixed row structures are listed, then your system does not have any available fixed row structures. You must create one before you can create a web report using the selected template. You can click **Back** to select a different template, or you can click **Cancel** to exit the dialog and return to the Intelligence Center. For more information, see [Managing Fixed Row Structures](#).

- On the final screen, complete the following fields to save the new report, and then click **Create**.

Item	Description
Name	The name of the report file.
Description	Optional. A description for the report.

Item	Description
Save report in	<p>The folder in the Axiom repository where you want to save the report.</p> <ul style="list-style-type: none"> Click the folder icon  to the right of the field. In the Choose output folder dialog, select a folder in the Reports Library. You can only select folders where you have read/write access to the folder. If a folder name displays with a lock icon, this means you have read-only access to that folder and therefore cannot save a new report there. <p>NOTE: If you have access to the My Documents folder, then you can also save reports to that location for your personal use.</p> <ul style="list-style-type: none"> Click OK to choose the folder and return to the save dialog. <p>The path to your selected folder now displays in the field.</p>

The report is opened in the current browser tab. You can now review the data using a variety of tools available to web reports, such as sorting, filtering, and drilling. For more information, see [Viewing and exploring data in web reports](#).

Once a report is created from template, it cannot be edited—for example, to choose a different fixed row structure. If you want to use a different fixed row structure, create a new report from template again. Remember that any changes to the template or to the fixed row structure will automatically flow through to all reports that use the template or the fixed row structure.

Using the Report Builder

Using the Report Builder, you can create and edit web reports using a drag-and-drop interface. Web reports are intended to be intuitive for report builders to create and easy for report viewers to use.

Web reports support two different ways to display reporting data in a grid:

- **Dynamic rows:** Dynamically display data rows based on a specified dimension or grouping.
- **Fixed rows:** Use predefined fixed row structures to organize data rows into sections with headers, totals, and subtotals.

The Report Builder opens when you do either of the following:

- [Create a new web report](#) from the Intelligence Center.
- [Edit an existing web report](#) from the Intelligence Center.

► Overview of Report Builder

The Report Builder has three main areas:

- The **Data Panel** on the left side is where you select the data to include in your report.

- The **Report Canvas** in the middle is where you build the report. Columns can be dragged and dropped from the Data Panel to the Report Canvas. You can also create calculations to display in the report columns, and define column groups.
- The **Configuration Panel** on the right side is where you define properties for the report, the data grid, and the individual columns. You can configure properties such as report titles, drilling and filtering options, and column formatting.

The screenshot displays the Axiom Report Builder interface. On the left is the **Data Panel** with a search bar and a list of tables including GL2020, Dimension Tables, and Related Tables. A callout box points to it with the text: "Data Panel: Select tables and columns to include in report". The main area is the **Report Canvas**, titled "Budget to Actuals | Corporate" with a subtitle "Through June 2020". It features a data grid with columns for WorldRegion, Q1 2020 (Actuals, Budget, Difference), and Q2 2020 (Actuals, Budget). A callout box points to the grid with the text: "Report Canvas: Drag and drop columns to design the report". On the right is the **Configuration Panel** with fields for Title, Secondary title, Subtitle, Report description, Report filters, and Report data. A callout box points to it with the text: "Configuration Panel: Configure grid, column, and report properties". The Report data section has three radio buttons: "Live data with manual refresh" (selected), "Live data with auto refresh", and "Mock data".

WorldRegion	Q1 2020			Q2 2020	
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget
Asia	\$6,989,316	\$5,416,397	29.04%	\$5,939,730	\$5,334,331
Europe	\$473,158	\$340,531	38.95%	\$389,618	\$335,371
North America	\$32,766,656	\$35,609,235	-7.98%	\$26,180,604	\$35,068,189
Total	\$40,229,130	\$41,366,163	-2.75%	\$32,509,952	\$40,737,891

Overview of the Report Builder

As you build and configure the report, a preview of the grid displays in the Report Canvas area. Several options are available to control how data is shown in this grid. For more information, see [Changing data display options for the Report Builder](#).

► Building a report in the Report Builder

The following is an overview of how to build a report in the Report Builder:

- **Define a data context:** Each report must have a specified primary table to determine the data context for the report. Once the data context is defined, you can build the report using columns from the primary table and from related tables.

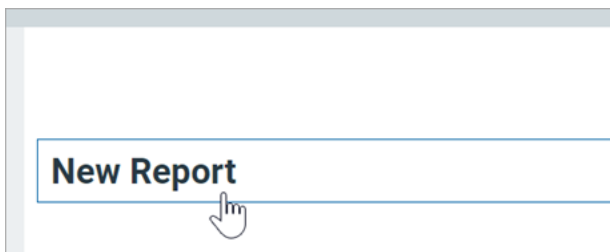
- Define the grid rows: Web reports can use dynamically generated rows based on a dimension, or they can use a fixed row structure. Do one of the following depending on the type of report that you want to make:
 - For dynamic rows, [add a row dimension](#) to the grid by dragging and dropping a table column.
 - For fixed rows, [specify a fixed row structure](#) by modifying the grid properties.
- [Add data columns and calculated columns](#): Drag and drop table columns out to the grid to define the data columns for the report, and define calculated columns as needed. You can also define [column groups](#) to create grouped headers in the report.
- Configure report-level properties:
 - [Define general report properties](#): You can define report title text and an optional report description.
 - [Define report filters](#): You can define general and table-specific filters to limit the data shown in the report grid.
- [Configure grid properties](#): Configure grid properties such as the total row and user interaction options, including enabling and configuring [drilling options](#) as needed.
- [Configure column properties](#): Configure properties for each column such as alignment, width, number format, and column filters.

► Changing data display options for the Report Builder

As you build and configure the report, a preview of the grid displays in the Report Canvas area. This grid accurately reflects report configuration details such as column headers, column width, and number format. Additionally, you can choose how data displays in the Report Builder.

To change how data displays in the Report Builder:

1. In the Report Canvas area, click on the title text to load the Report Configuration properties. For example, if the report currently uses the default name of New Report, click on the New Report text or next to it.

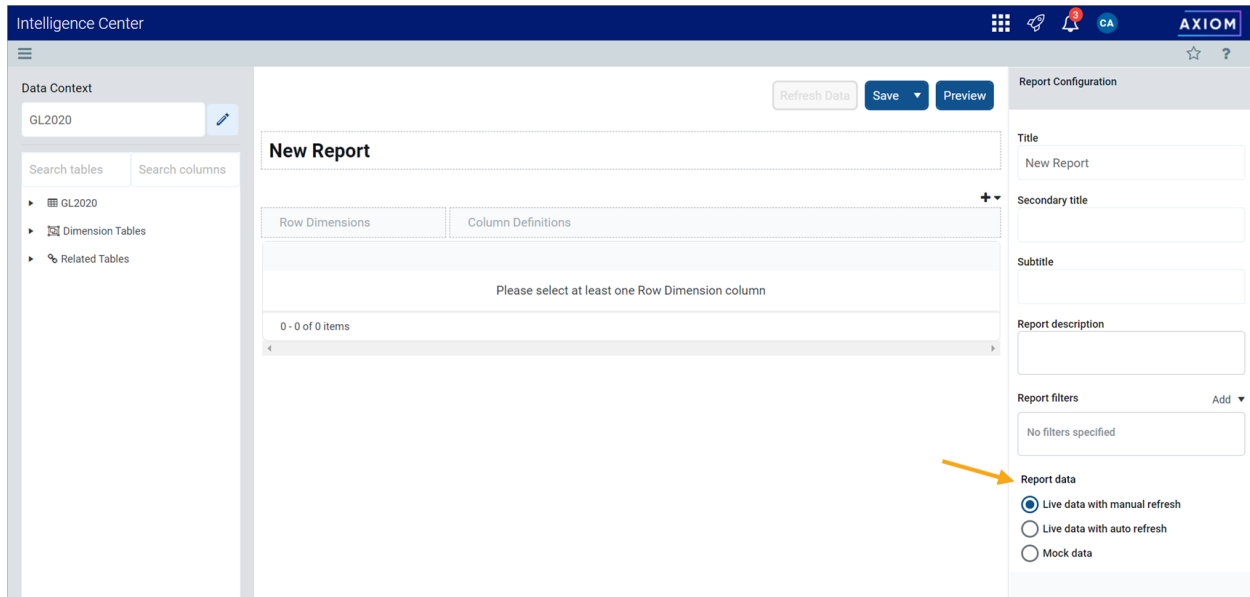


Click on the title text to load the Report Configuration properties

If you are in a brand new report, the Report Configuration properties display by default when you first enter the Report Builder. However, as soon as you drag and drop a column to the Row Definitions box or the Column Definitions box, the column becomes selected which causes the Column Configuration properties to display. In this case you need to click on the report title to return to the Report Configuration properties.

2. Select one of the following options for **Report data**:

- **Live data with manual refresh** (default): Live data is shown in the grid, however, you must manually refresh the data after making configuration changes that affect the data shown. This is for performance reasons, so that you do not have to wait for data queries to complete in order to continue working on your report. When using this option, data updates are handled as follows:
 - If you add a new column, or make a configuration change that would affect the data shown in the column, the column will be blank. To populate the grid for data in this column, click the **Refresh Data** button.
 - If you make a configuration change that would affect the data shown in the entire grid, the grid will be blank. To populate the grid with the current data, click the **Refresh Data** button.
- **Live data with automatic refresh**: Live data is shown in the grid, and the data automatically updates after you make any configuration changes. Generally speaking, this option should only be used when the report queries a small set of data so that updates will be quick, or when you do not expect to be making many configuration changes that affect data.
- **Mock data**: Mock data is shown in the grid. When using this option, you can get a basic idea of how the report columns and format will display to the user, without viewing actual data. This is a good option if you do not need to made configuration changes that affect the data, or if you do not need to view the data while you are making these changes.



Data display options for the Report Builder

The **Refresh Data** button is only available when using **Live data with manual refresh**, and this button only becomes active when configuration changes have been made that affect data.

Even if you are viewing live data, keep in mind that the grid shown in the Report Canvas is simply meant as a guide to help you build the report—it is not intended to be a fully functional representation of the report. If you want to see how the report will display to end users, click the **Preview** button.

NOTE: The **Report data** option is not saved in the report, and your selection is not saved for future Report Builder sessions. Every Report Builder session defaults to using live data with manual refresh.

► Previewing a report

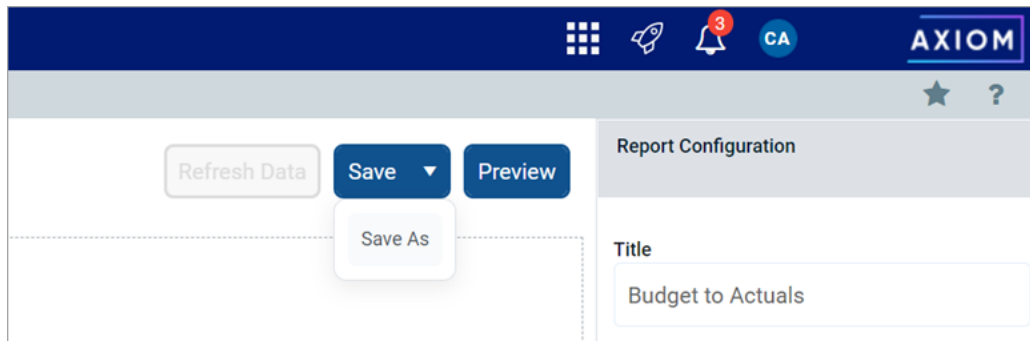
If you want to see how the report will display to end users in the report viewer, click the **Preview** button at the top of the Report Canvas.

The report preview opens in a separate dialog that overlays the Report Builder. Using this preview, you can view the report data and try out end-user features like sorting, filtering, and drilling the report. When you are done viewing the preview, click **Close** at the bottom of the dialog to return to the Report Builder (or click the **X** in the top right corner).

► Saving a report

Use the **Save** button at the top of the Report Canvas to save the report. If the report is a brand new report, you will be prompted to define a name and folder location for the report. Otherwise, the existing report is saved.

If you have opened an existing report for editing and you want to save a copy of it with a new name, click the down arrow to the right of the Save button and select **Save As**.



Save button with Save As option

NOTE: The **Create Web Reports** security permission is required in order to use **Save As**.

If you have made changes to the report but have not yet saved, you will be prompted to save when you attempt to close the browser tab or navigate to a new location.

Defining the data context for a web report

The *data context* for a web report determines the overall pool of data that is eligible to be included in the report. To define the data context, you select a *primary table* as the "base" table for the report. This primary table then determines which other tables are eligible for inclusion in the report, based on lookup relationships. All table columns used in the report must be compatible in the context of the primary table.

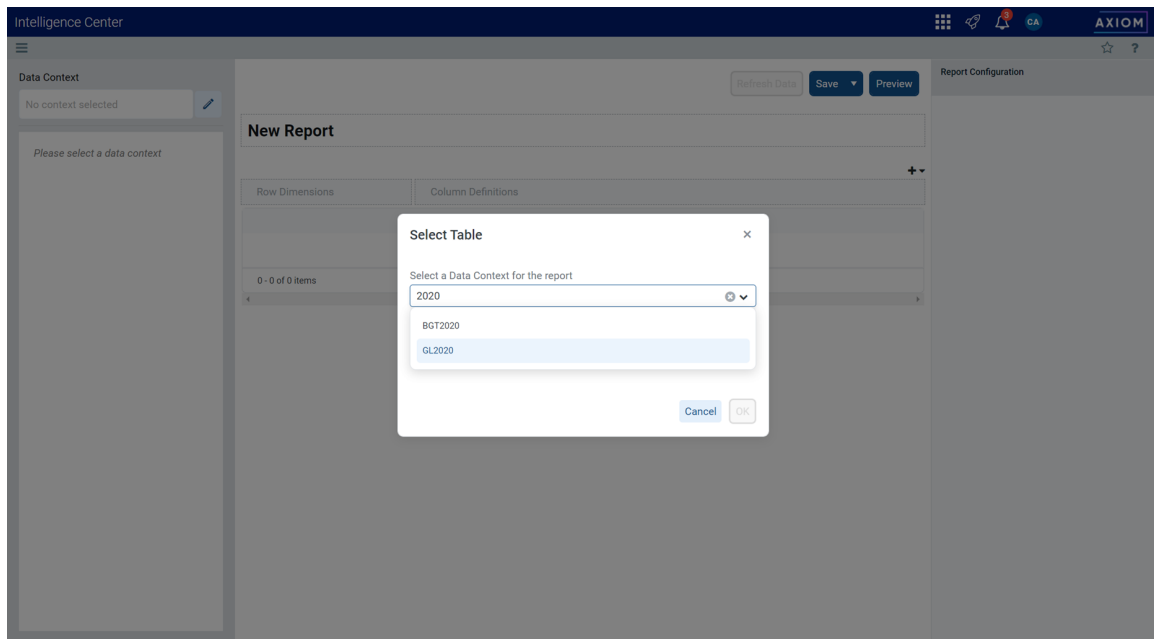
In the Report Builder, the primary table for the data context is specified in the left-hand Data Panel. You must select the primary table before you can drag and drop any table columns out to the grid.

To select a primary table for the data context:


There are two ways to select a primary table for the data context.

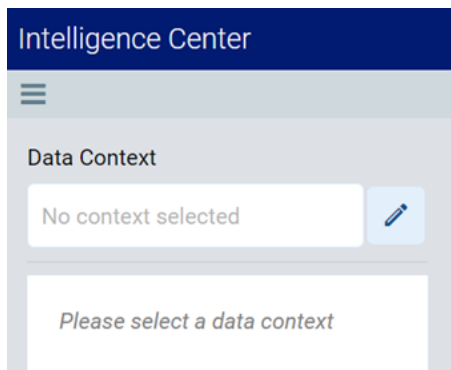
- When you [create a brand new report](#), you are automatically prompted to select a primary table for the data context.

You can select a table from the drop-down list directly, or type into the box to search for a table name. The search uses "contains" matching to return any tables that contain the search text within the table name. Tables that start with the search text are listed first, followed by tables that contain the search text anywhere in the table name. In the following screenshot, the text 2020 has been used to search for tables with the year 2020 in the name.



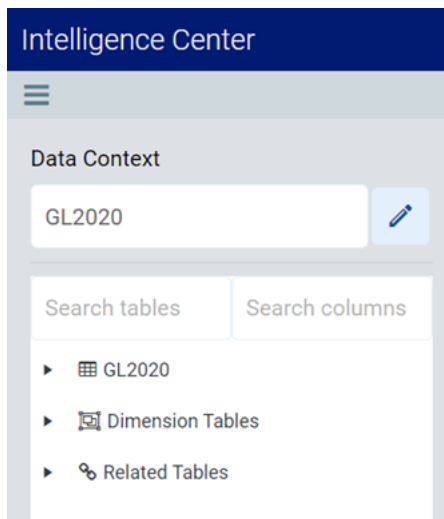
Example Select Table prompt when creating a new report

- If you are already in the Report Builder, then you can define or change the primary table using the **Data Context** box at the top of the Data Panel. Click the Edit icon  to open the **Select Table** dialog (as shown in the previous screenshot).



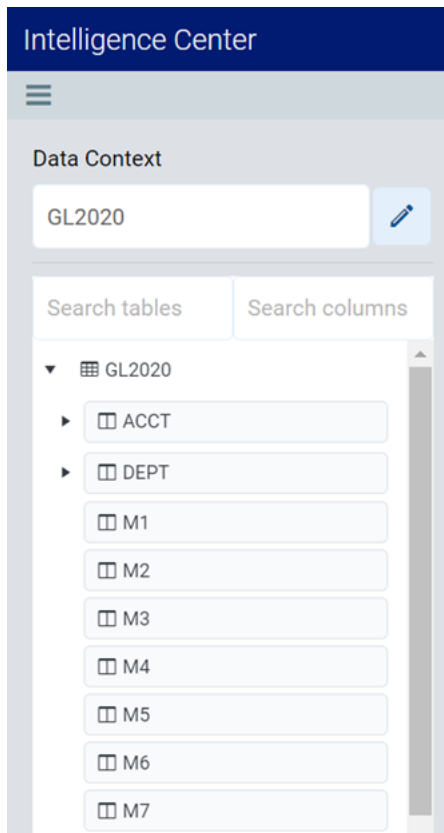
Once you have selected a table, that table name is shown in the **Data Context** box, and the Data Panel populates to show a table tree in three expandable/collapsible sections:

- **TableName:** The selected table and its columns. This table is the primary table.
- **Dimension Tables:** Reference tables that the primary table looks up to. If the reference tables have lookups to other reference tables, these multi-level reference tables are accessible through the first-level reference tables.
- **Related Tables:** The contents of this section depend on the type of table selected as the primary table.
 - If the primary table is a data table, then this section contains other tables that look up to one or more of the same reference tables as the primary table.
 - If the primary table is a reference table, then this section contains tables that look up to the reference table.



Example Data Panel with a defined data context

You can expand these tables to view the columns, and then drag and drop columns out to the Report Canvas area so that they can be used as [row dimensions](#) or [data columns](#).



In this example, we have selected GL2020 as the primary table. GL2020 is a data table that looks up to reference tables Dept and Acct. The table tree is populated as follows:

- **GL2020:** This node contains all columns in GL2020, as well as columns in the lookup tables Dept and Acct.
- **Dimension Tables:** This node contains the lookup reference tables Dept and Acct. If the reference tables look up to other downstream reference tables (multi-level lookups), those downstream reference tables can be used through these tables.
- **Related Tables:** This node contains other tables that also look up to Dept or Acct (or to a multi-level lookup through Dept or Acct). This may include tables such as GL2021, BGT2021, and BGT2020.

When you save the report, the data context is saved for that report and will be reloaded into the Data Panel whenever the report is opened in the Report Builder.

NOTES:

- When choosing the data context, the list of tables is automatically filtered to only show tables that you have access to. If you have the **Administer Tables** security permission, all tables will be shown. This means it can be possible to select a primary table where you do not have access to any of the data in the table. You can build the report but it will not populate with data.
- Certain tables can be restricted from showing in the Report Builder using the system configuration setting **TablesRestrictedFromReportWriter**. If a table that you have access to is not available, it has likely been restricted using this setting.

► Changing the data context

You can change the data context freely until you have done either of the following:

- Dragged and dropped columns out to the grid setup boxes in the Report Canvas
- Selected a fixed row structure for use with the report (when using the **Use fixed rows** option in the [Grid Configuration properties](#))

You can still change the data context if needed, but any newly selected primary table must be compatible with the table columns you have already added to the grid, and with the fixed row structure you have selected (if applicable). If the newly selected primary table is not compatible, an error will occur when the Report Builder tries to refresh the grid in the Report Canvas. At this point you have the choice of selecting a different primary table that is compatible (which may mean returning to the original primary table), or removing the incompatible columns from the grid, or choosing a different fixed row structure.

Other settings that must be compatible with the primary table include columns selected as drilling columns for a Directed drilling configuration. If you change the primary table and any of these settings are incompatible with the new primary table, an error will occur.

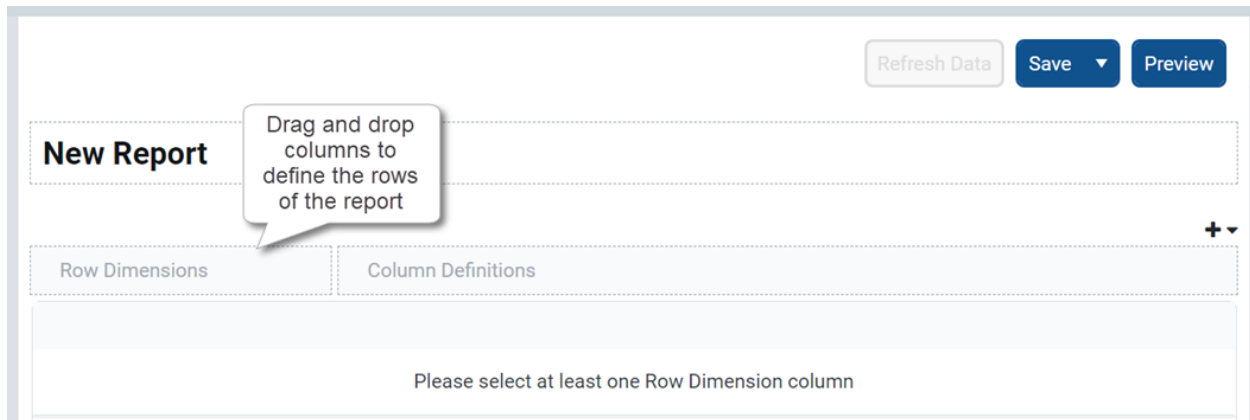
If you change the data context and save the report, the new primary table is now saved for the report and will be reloaded into the Data Panel whenever the report is opened in the Report Builder.

Specifying the row dimension for a web report

The row dimension for a web report defines the summation level for the row data. For example, you may want the rows in your grid to show data by department, region, entity, account, or some combination of dimensions. You specify a table column to use as the row dimension, and then the rows in the grid are dynamically generated based on the unique values in that column.

NOTE: If you want your report to use a static row structure with multiple sections instead of dynamically generating the rows, then use a [fixed row structure](#) instead of a row dimension.

The row dimension for the report is placed in the left-hand box at the top of the Report Canvas, known as the **Row Dimensions** box. The report grid cannot render until you specify either a row dimension or a fixed row structure.



Row Dimensions box at the top of the Report Canvas

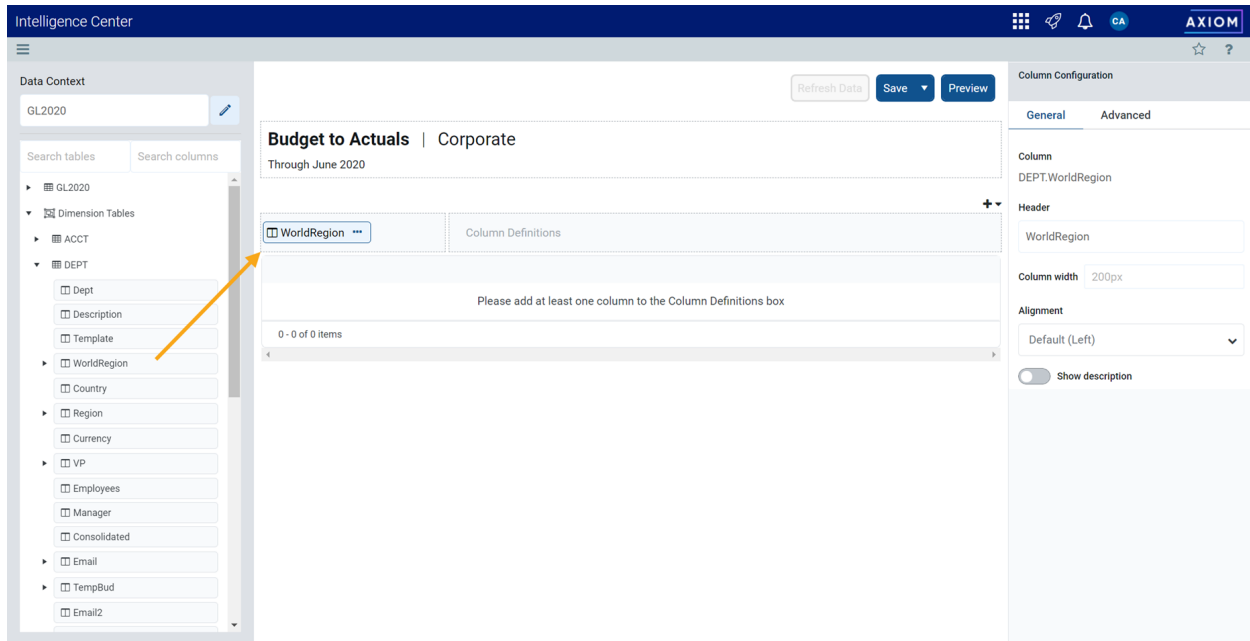
Web reports can have multiple row dimensions. If two or more row dimensions are specified, then each row in the report represents a unique combination of the dimensions. For example, if the row dimension is just Dept, then each row shows data for a department. If the row dimension is Dept and Acct, then each row shows data by the unique combinations of department and account.

To specify a row dimension for a web report:

1. In the Data Panel of the [Report Builder](#), expand the table tree until you locate the column that you want to use as a row dimension.

If the Data Panel is empty, this means you must select a [primary table](#) first.
2. Drag and drop the column to the **Row Dimensions** box at the top of the Report Canvas.
3. Select the column name in the Row Dimensions box, and then use the **Column Configuration** panel to configure display properties such as column width, alignment, header text, and formatting. For more information, see [Configuring column properties for a web report](#).
4. If multiple columns are present in the Row Dimensions box, you can drag and drop them within the box so that they display in the desired order within the grid.

Once a row dimension is specified, the Data Panel updates to remove any tables that are incompatible with the specified row dimension. You can now build out the data columns of the report by dragging and dropping columns from the Data Panel, and by creating calculated columns. For more information, see [Adding data columns and calculated columns to a web report](#).



Defining a row dimension for a web report

NOTE: If you drag and drop a validated column from a data table to use as the row dimension, such as GL2020.Dept, this column reference is automatically updated to point to the lookup table instead, meaning Dept.Dept. This is done so that the column reference is compatible with other data tables that reference the same lookup table.

► Displaying descriptions for the row dimension

In many cases your row dimension will be a code, such as a department code or an account code, and you want to display the description for the code next to it.

To display descriptions on a dimension column:

1. Select the row dimension column in the **Row Dimensions** box.
2. In the **Column Configuration** settings, on the **General** tab, enable **Show description**.
3. From the **Description display format** list, select the desired display format.

In the following example, the Dept column has been configured to show descriptions using the **Value - Description** format. If you select a format that shows descriptions first, such as **Description (Value)**, then the rows will be sorted by the descriptions instead of the underlying values.

Refresh Data
Save
Preview

New Report

DEPT

DEPT	M1	M2	M3
20000 - Corporate	\$338,371	\$348,818	\$512,223
21000 - Corporate Administration	\$109,424	\$142,424	\$113,341
22000 - Information Technologies	\$446,802	\$463,814	\$466,517
23000 - Purchasing & Materials Mgmt	\$129,671	\$169,499	\$128,494
24000 - Business Development	\$29,110	\$28,736	\$32,289
25000 - Finance	\$169,733	\$187,145	\$187,505
26000 - Portfolio Management	\$105,420	\$43,794	\$87,421

M1

M2

M3

Column Configuration

General

Advanced

Column

DEPT.Dept

Header

DEPT

Column width

300

Alignment

Default (Left)

Number format

Default (Dimension)

Show description

Description display format

Value - Description

Example row dimension column configured to show descriptions

Although you can add the description column to the grid as a separate column instead of using the **Show description** option, this may not always achieve the desired results. For example:

- If you add the description column as a row dimension, then it will display next to the dimension values but it will cause the data to be additionally grouped by the description values. This is not recommended because the additional grouping is unnecessary, and in some cases may not produce the desired results (for example, if descriptions are not unique).
- If you add the description column as a regular column, then the descriptions will not be frozen next to the dimension codes for scrolling purposes.

► Filtering the row dimension

In some cases you want the report to display a subset of values from the row dimension column, instead of all values. To filter the row dimension values, use the [Report Configuration properties](#) to define a general filter for the report.

For example, if the row dimension is Dept but you want the report to only display departments that belong to a specific entity, define a general filter such as `Dept.Entity='Entity 1'`. This will filter the grid so that it only shows data that belongs to Entity 1, including the row dimension values. Department codes that do not belong to Entity 1 will not be included in the data query.

► Changing the row dimension

You can change the row dimension at any time by dragging and dropping additional columns to the **Row Dimensions** box, or by removing existing row dimensions.

To remove a row dimension, click the three-dots icon to the right side of the column name and then select **Delete Column**. If you remove the only row dimension, the grid in the Report Canvas cannot be rendered until you specify a new one.

If you change the row dimension after adding data columns and calculated columns, or if you change the primary table after specifying a row dimension, it is possible that some of the selections may be incompatible with each other. In this case, an error will display when the Report Builder attempts to refresh the data in the Report Canvas. You may have to remove incompatible columns, change the row dimension, or change the primary table in order to restore a valid grid configuration.

If you decide that you want to change the report to use a fixed row structure instead of a row dimension, use the **Grid Configuration** properties to enable fixed rows and then choose a fixed row structure. For more information, see [Specifying the fixed row structure for a web report](#). Any columns currently placed in the Row Dimensions box will be ignored while fixed rows are enabled for the report.

Specifying the fixed row structure for a web report

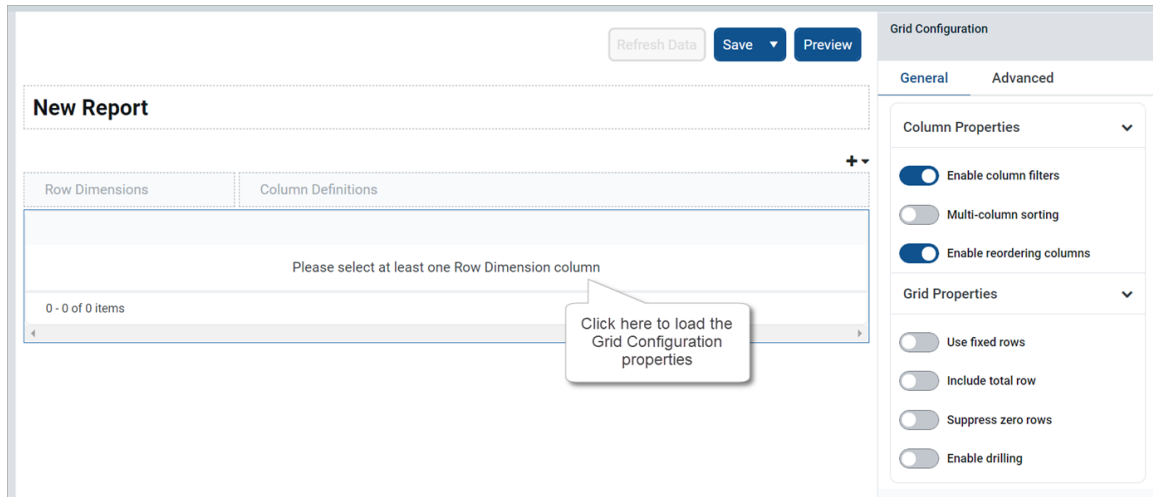
Web reports can optionally use fixed row structures to define the data sections in the report. Instead of dynamically generating the rows based on a table column, fixed row structures individually define each row of data, including section headers, subtotals, and totals.

Fixed row structures are defined separately so that you can reuse them in different web reports, and so that you can update the row structure in one place and have the changes propagate to all reports that reference the fixed row structure. The fixed row structure that you want to use in the web report must already exist—they cannot be created or edited in the Web Report Builder. For more information, see [Managing Fixed Row Structures](#).

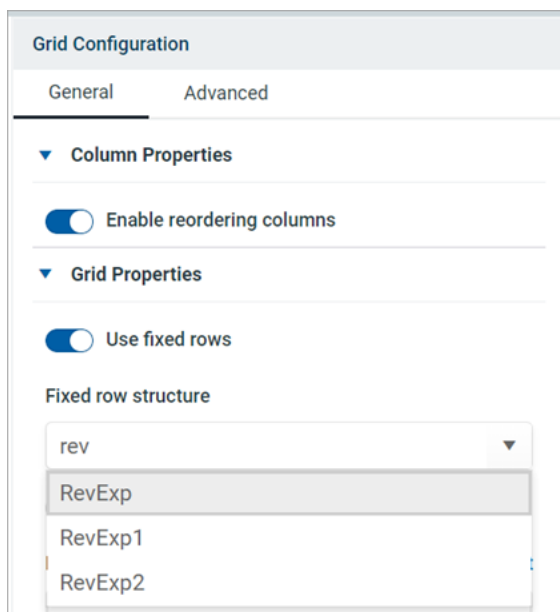
The fixed row structure is specified in the Configuration Panel, using the **Grid Configuration** properties. The grid in the Report Canvas cannot render until you specify either a fixed row structure or a [row dimension](#).

To specify a fixed row structure for a web report:

1. In the Report Canvas of the [Report Builder](#), click the grid area below the column setup boxes. This area displays with placeholder text until either a row dimension or a fixed row structure is specified.



2. In the **Grid Configuration** properties, enable **Use fixed rows**.
3. From the **Fixed row structure** drop-down list, select an existing fixed row structure. You can type into the box to filter the list by name.



After selecting a fixed row structure, the Report Canvas area updates as follows:

- The Row Dimensions box updates to show a placeholder column named **Fixed Row Header Column**. This column is the column that holds the section titles and data row labels as defined in the fixed row structure. You can select this placeholder column in order to [configure](#) certain display details about this column within the web report.
- Once you have dragged and dropped at least one data column to the Column Definitions box, you can use **Refresh Data** to update the grid and show the sections and rows as defined in the fixed row structure.

Revenue Q1 | By World Region

	Asia	Europe	North America
Revenue			
Revenue	\$6,989,316	\$473,158	\$32,766,656
Cost of Goods Sold	\$2,089,667	\$174,715	\$10,060,984
Net Revenue	\$4,899,650	\$298,443	\$22,705,672
Expenses			
Marketing	\$9,351	\$5,568	\$123,206
Supplies	\$31,933	\$10,702	\$719,143
Payroll	\$1,489,322	\$179,306	\$8,299,401
Travel	\$391,740	\$77,541	\$2,044,674
Expenses Total	\$1,922,346	\$273,117	\$11,186,423
Net Income	\$6,821,996	\$571,560	\$33,892,096

Example web report using a fixed row structure

NOTES:

- If you want to make changes to the fixed row structure, you must edit the structure in the separate fixed row structure editor. Any changes made to the row structure will automatically apply to any web report that uses the fixed row structure.
- If you decide that you want to use dynamically generated rows instead of a fixed row structure, you can simply disable **Use fixed rows** and then drag a column to the Row Dimension setup box. For more information see [Specifying the row dimension for a web report](#).

► Impact on Grid Configuration options

When **Use fixed rows** is enabled for the grid, multiple grid configuration options become unavailable because they do not apply to web reports that use fixed row structures. If these options were configured before fixed rows were enabled for the grid, the configuration will be ignored.

- **Enable column filters:** End users cannot filter columns when using fixed rows.
- **Multi-column sorting:** End users cannot sort columns when using fixed rows.
- **Include total row** (and related settings): This option does not apply because fixed row structures have their own defined subtotal and total rows.
- **Suppress zero rows:** This option does not apply to fixed row structures; all configured rows will display regardless of whether they return all zero data.

► Configuring the Fixed Row Header Column

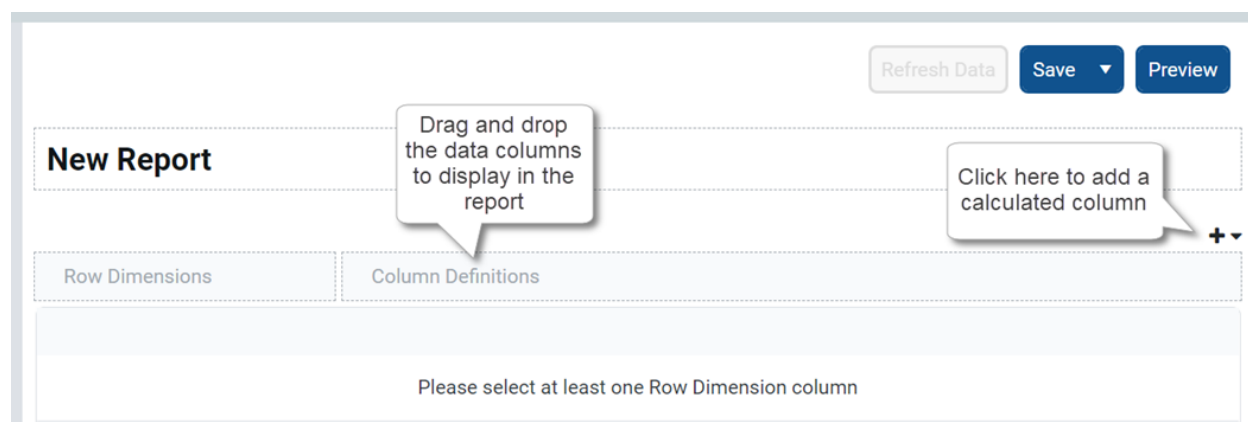
Most of the display details for the Fixed Row Header Column are configured within the fixed row structure and therefore cannot be changed within the web report. However, if you select the **Fixed Row Header Column** item in the Row Dimension setup box, you can configure the following:

Item	Description
Column width	The column width of the column in the grid, in pixels. Enter the desired column width as a whole integer between 30 and 600. The default width of the Fixed Row Header Column is 400.

Adding data columns and calculated columns to a web report

When creating a web report, you can add as many columns as needed to define the data that you want to display in the report. You can also define calculated columns, such as to show the difference between two columns.

The data columns and calculated columns for the grid are placed in the right-hand box at the top of the Report Canvas, known as the **Column Definitions** box. This box defines the columns to display in the report. Although it is possible to add columns and calculated columns to the Column Definitions box before specifying a [row dimension](#) or a [fixed row structure](#), the grid in the Report Canvas will not populate until the rows are defined.



Column Definitions box at the top of the Report Canvas

► Adding data columns

To display data in the report, you can drag and drop table columns from the Data Panel to the Column Definitions box in the Report Canvas. The Data Panel displays the tables and columns that are eligible to be included in the report, based on the selected [data context \(primary table\)](#) and the specified [row dimension](#).

To add a data column to a web report:

1. In the Data Panel of the [Report Builder](#), expand the table tree until you locate the column that you want to add to your report. You can also use the search boxes at the top of the panel to find a particular table or column by name.
2. Drag and drop the column to the **Column Definitions** box at the top of the Report Canvas.

NOTE: When using the default behavior, the new column will render as blank in the report until you click **Refresh Data**.

3. If the column is not in the desired location within the grid, drag and drop it within the Column Definitions box to reorder the columns.
4. Use the **Column Settings** in the Configuration Panel to configure display properties for the column, such as column width, alignment, header text, and formatting. For more information, see [Configuring column properties for a web report](#).

By default, when you drag and drop a column to the grid, that column is selected and its column properties display in the Configuration Panel. You can return to the column properties at any time by clicking the column name in the Column Definitions box.

Intelligence Center

GL2020

Search tables Search columns

BGT2020

ACCT

DEPT

DETAIL

M1

M2

M3

M4

M5

M6

M7

M8

M9

M10

M11

M12

SaveTagDocID

SaveTag

CYAYTDVerification

Refresh Data Save Preview

Budget to Actuals | Corporate

Through June 2020

WorldRegion Q1 Actuals Q2 Actuals Q1 Budget Q2 Budget

WorldRegion	Q1 Actuals	Q2 Actuals	Q1 Budget	Q2 Budget
Asia	\$59,064,980	\$58,174,791	\$33,016,385	\$34,789,159
Corporate	\$11,784,872	\$7,370,832	\$6,005,599	\$6,195,873
Europe	\$30,700,879	\$30,422,551	\$1,311,221	\$1,332,025
North America	\$760,941,761	\$750,385,484	\$153,873,112	\$139,542,480

1 - 4 of 4 items

Click on a column name to configure it

Drag columns from the Data Panel to the Column Definitions box

Column Configuration

General Advanced

Column BGT2020.Q2

Header Q2 Budget

Column width 120px

Alignment Default (Right)

Number format Default (Currency)

Aggregation Default (Sum)

Data filter No filters defined

Enable filter

Hide column

Example web report after adding data columns

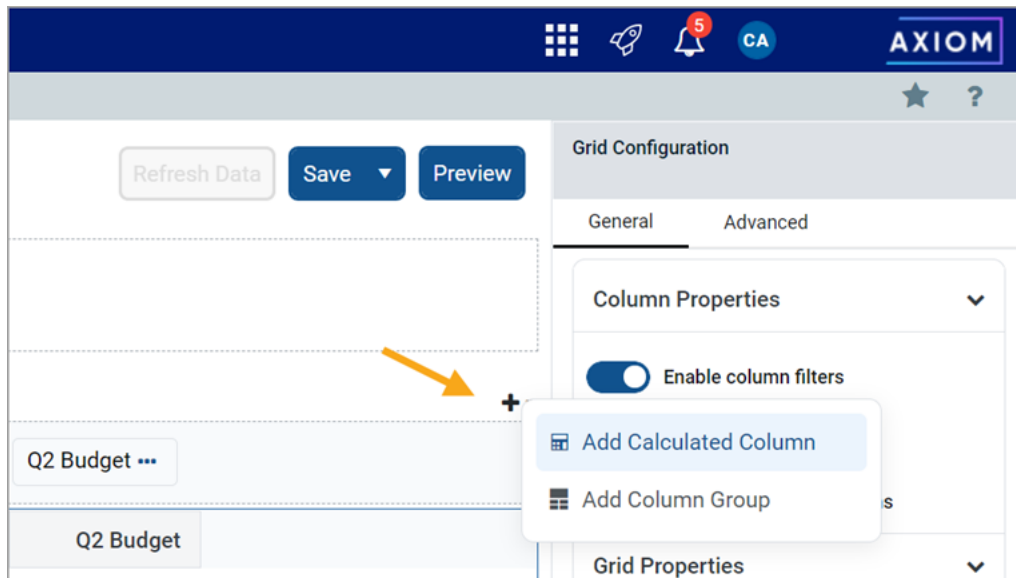
NOTE: If **Use fixed rows** is enabled for the grid, currently the Report Builder does not dynamically update the tables listed in the Data Panel based on the specified fixed row structure. If you drag and drop a column from a table that is not valid in the context of the fixed row structure, a generic error will occur when the Report Builder attempts to populate the grid.

► Adding calculated columns

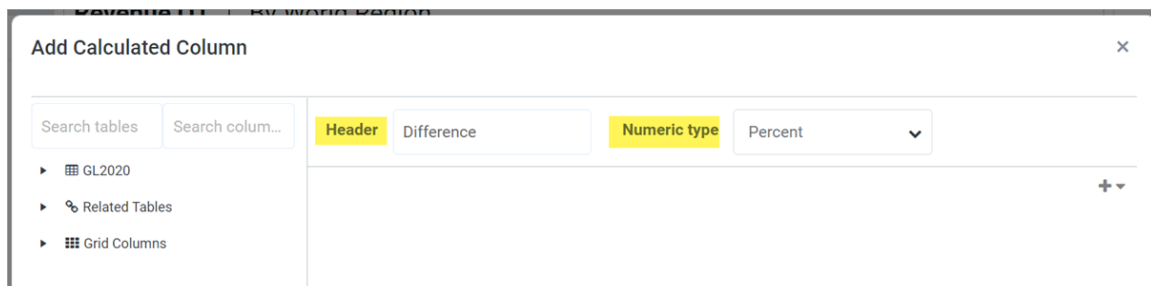
Calculated columns can be used to display totals, differences, percentages, and other calculations within a column of the report. Calculations can be based on columns from related tables that are eligible to be included in the report.

To add a calculated column to a web report:

1. In the Report Canvas of the [Report Builder](#), click the plus sign in the top right corner of the **Column Definitions** box, and then click **Add Calculated Column**.



2. At the top of the **Add Calculated Column** dialog, define the following properties:
 - **Header:** Enter the column header text for the calculated column. This is effectively the name of the calculated column. By default, the header text is "Calculation".
 - **Numeric type:** Select the desired numeric type for the calculated column. If this is left at **Default**, the default numeric type for calculated columns is Currency.



You can change these properties later using the Column Configuration properties in the Configuration Panel.

3. To create the calculation, drag and drop columns from the table tree on the left to the calculation canvas. See [Defining calculations](#) for more information.
4. When you are finished creating the calculated column, click **OK**.

The calculated column is added to the Column Definition box. By default, the new column is blank until you click **Refresh Data**.

5. If the calculated column is not in the desired location within the grid, drag and drop it within the Column Definition box to reorder the columns.
6. Use the **Column Configuration** properties in the Configuration Panel to configure display properties for the column, such as column width and alignment. For more information, see [Configuring column properties for a web report](#).

By default, when you define a calculated column, that column is selected and its column properties display in the Configuration Panel. You can return to the column properties at any time by clicking the column name in the Column Definitions box.

The screenshot displays the Axiom Intelligence Center interface. On the left, the 'Data Context' panel shows 'GL2020' selected. The main report area is titled 'Budget to Actuals | Corporate' and 'Through June 2020'. It features a table with columns: WorldRegion, Q1 Actuals, Q1 Budget, Difference, Q2 Actuals, and Q2 Budget. The 'Difference' column is highlighted, indicating it is the selected calculated column. The table data shows values for Asia, Europe, and North America, with a total row at the bottom. On the right, the 'Column Configuration' panel is open, showing settings for the selected 'Difference' column, including its calculation formula, header, alignment, number format, and data filter.

WorldRegion	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget
Asia	\$6,989,316	\$5,416,397	29.04%	\$5,939,730	\$5,334,331
Europe	\$473,158	\$340,531	38.95%	\$389,618	\$335,371
North America	\$32,766,656	\$35,609,235	-7.98%	\$26,180,604	\$35,068,189
	\$40,229,130	\$41,366,163	-2.75%	\$32,509,952	\$40,737,891

Example web report after creating a calculated column

► Defining calculations

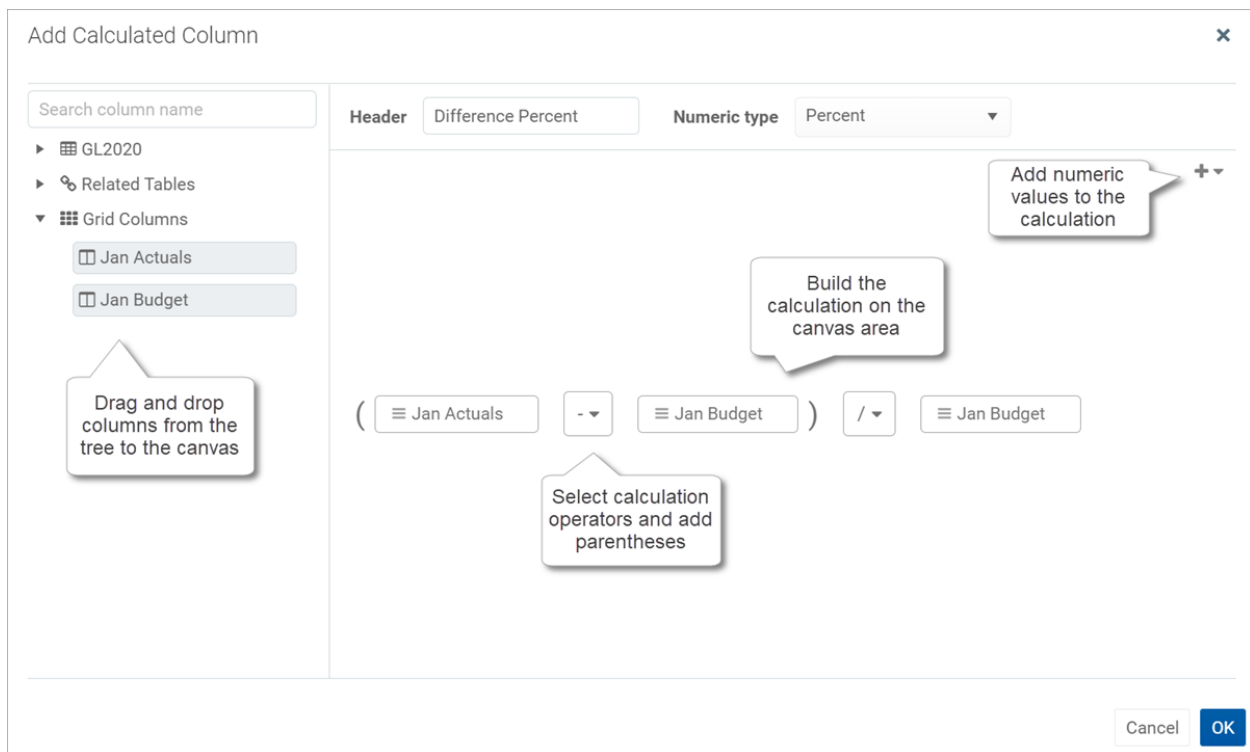
Using the **Add Calculated Column** dialog, you can build a calculation based on columns from related tables that are eligible to be included in the report. The column does not have to be present in the grid in order to be used in a calculation. Numeric values can also be used in the calculation.

The left-hand side of the dialog lists a table tree of available columns, while the right-hand side of the dialog—the calculation "canvas"—is where you build the calculation. To start the calculation:

- Drag and drop two columns out to the canvas. The two columns are separated by an operator selector.
- Select the desired operator.

You can continue building the calculation by dragging and dropping additional columns and selecting the operator. You can also do the following:

- **Numeric values:** To add a numeric value to the calculation, click the plus icon at the top right of the dialog. You can then move, reorder, or delete the numeric value just like columns.
- **Reorder items:** To change the order of columns in the calculation, drag and drop them on the canvas.
- **Parentheses:** To add parentheses to a part of the calculation, select **Add Parentheses** from the operator selector. The two columns affected by the operator will become enclosed in parentheses.
- **Delete items:** To delete an item, hover your cursor over the column and then click the trash can icon.



Example calculation in the calculation editor

Calculations can use the following operators: addition (+), subtraction (-), multiplication (*), and division (/). Use parentheses to determine calculation order, such as: (GL2021.Q1 - BGT2021.Q1) / BGT2021.Q1.

Calculations can use the following columns:

- Numeric columns from the primary table, whether or not those columns are also in the grid.
- Numeric columns from related tables, whether or not those columns are also in the grid.
- Numeric columns from the grid, including other calculated columns. Grid columns display using the header text defined for the column.

If you use a table column from the grid instead of from the table itself, then the calculation will use the column as it is configured to display in the grid. For example, if the grid column has a column filter or uses an alternate aggregation, the calculation will be based on that modified version of the column.


NOTES:

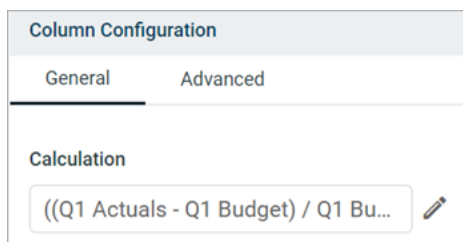
- If you drag and drop a column from the primary table or a related table, it displays on the canvas using the column name only—such as M1. You can hover your cursor over the column box to see a tooltip with the full table.column name—such as GL2021.M1. If you drag and drop the column from the Grid Columns node, then it will display using the defined header text for the column.
- If you use a grid column in the calculation, then the grid column cannot be deleted from the grid because deleting it would cause the calculation to become invalid. An error message will display if you attempt to delete a referenced column from the grid. To resolve the issue, you can do one of the following: edit the calculation to remove the reference, delete the calculated column, or configure the grid column as hidden so that it can still be referenced in the calculation but not display in the report.

► Editing calculated columns

You can edit an existing calculated column to change the calculation.

To edit a calculated column in a web report:

1. In the Report Canvas of the [Report Builder](#), click the calculated column in the Column Definitions box.
2. On the **General** tab of the **Column Configuration** properties, click the Edit icon  to the right of the **Calculation** box.



3. In the **Edit Calculated Column** dialog, edit the calculation as needed, then click **OK**.

► Additional column actions

Once data columns and calculated columns have been added to the grid, you can further adjust them as follows:

- **Reorder columns:** To reorder a column in the grid, drag and drop it to any location in the Column Definitions box. Note that you cannot drag and drop a column from the Column Definitions box to the Row Definitions box. If you accidentally dragged a column to the wrong box, you must remove the column and then drag and drop it again from the Data Panel.
- **Remove columns:** To remove a column from the grid, click the three-dots icon to the right of the column name and then select **Delete Column**. Use caution before removing a calculated column—if you later decide you want to re-add the column, you will need to re-create the calculation from scratch.
- **Copy columns:** To copy a column in the grid, click the three-dots icon to the right of the column name and then select **Clone Column**. A copy of the column is created to the right of the original column. The new column has the same properties as the original column, except that the text **(Copy)** is appended to the header text. You can modify the new column as needed in order to differentiate it from the original, such as to define a filter for the column, or to modify the calculation.

NOTE: If you copy a table column in the grid (as opposed to a calculated column), it is not possible to point the column to a different table column. The purpose of copying a table column is to display multiple instances of the same table column, but using different filters or different aggregation types.

- **Group columns:** If you want a set of columns to display under a group header, you can define a column group and then add the columns to that group. For more information, see [Defining column groups for a web report](#).
- **Configure columns:** To configure display properties for a column, select the column name in the Column Definitions box, then use the **Column Configuration** properties in the Configuration Panel. For more information, see [Configuring column properties for a web report](#).

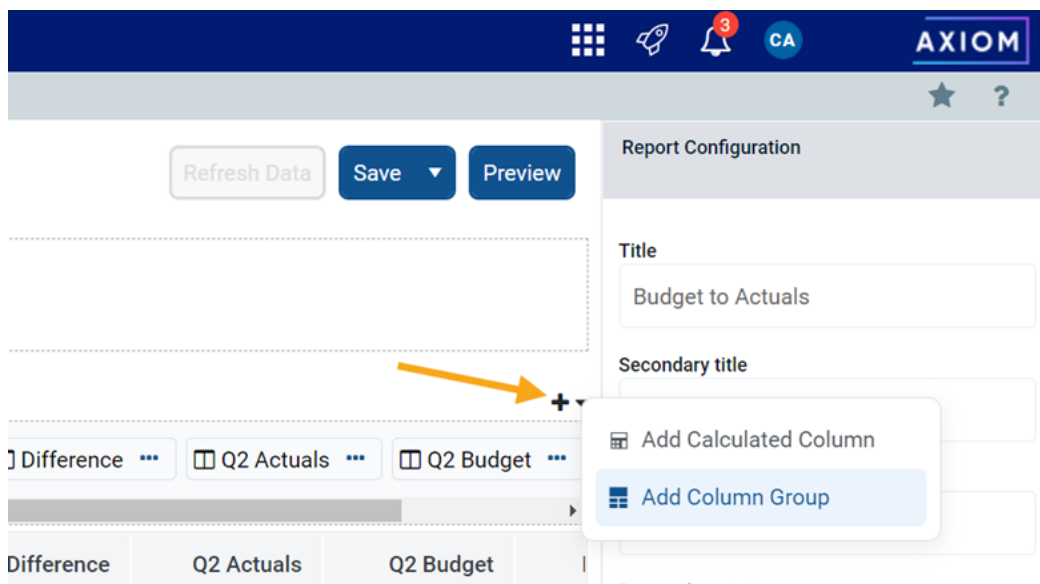
Defining column groups for a web report

You can define column groups in web reports so that certain columns can display together under a group header. For example, your report might have several actuals columns followed by several budget columns, and you want these columns to display under the group headers "Actuals" and "Budget".

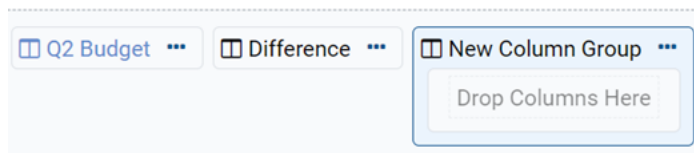
To define a column group, first you add the group "container" to the Column Definitions box of the grid, then you add table columns to the group container.

To define a column group:

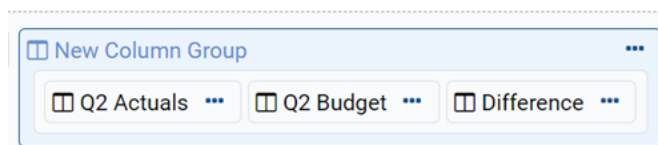
1. In the Report Canvas of the [Report Builder](#), click the plus sign in the top right corner of the Column Definitions box, and then click **Add Column Group**.



A new empty column group is added to the Column Definitions box.



2. Drag and drop the desired columns into the column group. Columns must first be added to the Column Definitions box before they can be dragged and dropped into a column group. It is not possible to drag and drop a table column directly from the Data Panel into a column group.



3. Select the column group box, and use the **Column Group Configuration** panel to define the header text and other properties. See the following section for more information on the [available properties](#).

The column group displays in the grid with its child columns underneath.

Budget to Actuals | Corporate
Through June 2020

WorldRegion	Q1 2020			Q2 2020	
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget
Asia	\$6,989,316	\$5,416,397	29.04%	\$5,939,730	\$5,334,331
Europe	\$473,158	\$340,531	38.95%	\$389,618	\$335,371
North America	\$32,766,656	\$35,609,235	-7.98%	\$26,180,604	\$35,068,189
	\$40,229,130	\$41,366,163	-2.75%	\$32,509,952	\$40,737,891

1 - 3 of 3 items

Example web report with column groups

Once a column group has been created, you can work with it as follows:

- **Reordering groups:** To reorder a column group, drag and drop the group to another location within the Column Definitions box.
- **Deleting groups:** To delete a column group, click the three-dots icon in the top right corner of the group box and then select **Delete Group**. However, if you still want to use the columns in the group, you should drag and drop the columns out of the group before deleting the group. If you delete the group with columns in it, all of the columns will be deleted as well.
- **Copying groups:** To copy a column group, click the three-dots icon in the top right corner of the group box and then select **Clone Group**. A copy of the group is created to the right of the original group, including copies of the child columns within the group. The new group has the same properties as the original group, except that the text **(Copy)** is appended to the header text. You can modify the new group as needed in order to differentiate it from the original, such as to define a filter for the group, or to populate the group with different child columns.
- **Configuring groups:** To configure display properties for a column group, select the group in the Column Definitions box, then use the **Column Group Configuration** properties in the Configuration Panel.
- **Nested groups:** Currently, nested groups are not allowed. You cannot drag and drop a group within another group.

You can work with columns within the group as follows:

- **Adding columns:** You can continue to add columns by dragging and dropping them into the group box. You can also copy columns within the group.
- **Removing columns:** You can drag and drop columns out of the column group box to remove them from the group. If you don't want the column to be in the report at all, you can delete the column as normal.
- **Reordering columns:** You can reorder columns in the group by dragging and dropping them within the group box.
- **Configuring columns:** Columns in a column group can be configured as normal. Select the column box within the group box to bring up the **Column Configuration** properties in the Configuration Panel.

► Column group properties

The following column group properties are available for web reports on the **General** tab of the **Column Group Configuration** panel:

Item	Description
Header	The header text to display on the group header. Enter the desired header text.
Hide column	Specifies whether the column group is hidden in the report: <ul style="list-style-type: none">• If enabled, then the group is hidden in the report. The group remains visible in the Column Definitions box so that you can continue to configure the group as needed.• If disabled (default), then the group is visible.
Autowrap header text	Specifies whether header text wraps: <ul style="list-style-type: none">• If enabled, then header text that exceeds the group width will wrap.• If disabled (default), then header text that exceeds the group width is truncated. The user can resize the group wider to view the full header text.
Header alignment	The alignment of the header text over the columns in the group. Select one of the following: Default , Left , Right , Center . Group headers use center alignment by default.

Item	Description
Data filter	<p>Optional. Defines a filter to limit the data shown in the columns within this group. This is equivalent to defining the same data filter at the column level for each column in the group.</p> <p>Click the Edit button to open the Filter Wizard and define a filter. Once you have defined a filter, it displays in the Data filter box.</p> <p>If you want to change or remove the filter, click the Edit link again and change or delete the filter within the Filter Wizard. The Data filter box is not directly editable.</p> <p>Data filters defined at the group level are combined with any filters defined at the column level. If the group contains calculated columns, the group filter is applied to all columns referenced in the calculation. If the calculation references grid columns, the group filter is combined with any other filters applied to the grid columns (either at the column level or at the group level, if the column belongs to a different group). Additionally, if a data filter is defined at the report level, it is also applied. All relevant filters are combined using AND to determine the data that can display in a particular column.</p>

Defining report titles and description for a web report

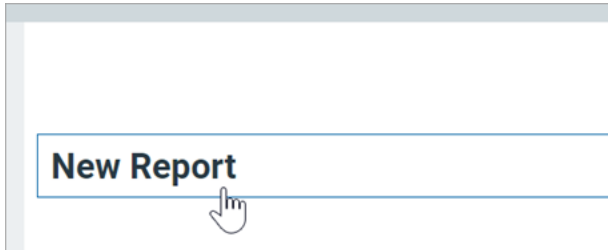
Using the general **Report Configuration** properties in the Configuration Panel, you can define a title, subtitle, and secondary title for the web report. You can also define an optional report description.

Intelligence Center							
Budget to Actuals Corporate							
Through June 2020							
WorldRegion	Q1 2020			Q2 2020			
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference	
Asia	\$6,989,316	\$5,416,397	29.04%	\$5,939,730	\$5,334,331	11.35%	
Europe	\$473,158	\$340,531	38.95%	\$389,618	\$335,371	16.18%	
North America	\$32,766,656	\$35,609,235	-7.98%	\$26,180,604	\$35,068,189	-25.34%	
Total	\$40,229,130	\$41,366,163	-2.75%	\$32,509,952	\$40,737,891	-20.20%	

Example titles as they display in a rendered report

To configure report titles and description for a web report:

1. In the Report Canvas of the [Report Builder](#), click on the title text to load the Report Configuration properties. For example, if the report currently uses the default name of New Report, click on the New Report text or next to it.



Click on the title text to load the Report Configuration properties

If you are in a brand new report, the Report Configuration properties display by default when you first enter the Report Builder. However, as soon as you drag and drop a column to the Row Definitions box or the Column Definitions box, the column becomes selected which causes the Column Configuration properties to display. In this case you need to click on the report title to return to the Report Configuration properties.

2. In the **Report Configuration** panel, complete the report properties as needed.

WorldRegion	Q1 2020			Q2 2020		
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference
Asia	\$6,989,316	\$5,416,397	29.04%	\$5,939,730	\$5,334,331	
Europe	\$473,158	\$340,531	38.95%	\$389,618	\$335,371	

Title-related report configuration properties

The following title and description properties are available:

Item	Description
Title	The main title for the report. This text displays at the top of the report, over the grid.

Item	Description
Secondary title	Optional. The secondary title for the report. If defined, this text displays in the same line as the main title, separated by a horizontal pipe character. For example: <i>Title Secondary Title</i>
Subtitle	Optional. The subtitle for the report. This text displays in smaller font underneath the main title.
Description	Optional. A description for the report.

NOTE: Currently, it is not possible to use variables in web report titles.

Defining report-level data filters for a web report

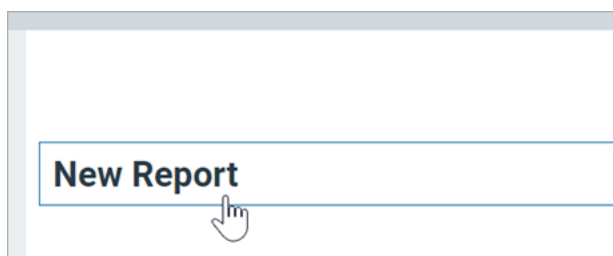
Using the **Report Configuration** properties in the Configuration Panel, you can define report-level filters to limit the data shown in the report.

You can use two types of filters:

- **General filters:** General filters are based on reference tables, and impact all tables in the report that look up to the reference tables used in the filter.
- **Table-specific filters:** Table-specific filters only impact a single specific data table used in the report.

To define report filters for a web report:

1. In the Report Canvas of the **Report Builder**, click on the title text to load the Report Configuration properties. For example, if the report currently uses the default name of New Report, click on the New Report text or next to it.



Click on the title text to load the Report Configuration properties

If you are in a brand new report, the Report Configuration properties display by default when you first enter the Report Builder. However, as soon as you drag and drop a column to the Row Definitions box or the Column Definitions box, the column becomes selected which causes the Column Configuration properties to display. In this case you need to click on the report title to return to the Report Configuration properties.

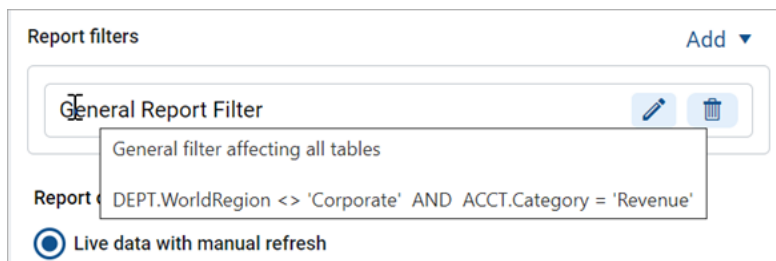
2. In the **Report Configuration** panel, click **Add** over the **Report Filters** box, then do one of the following:
 - Click **General Filter** to create a general filter.
 - Click **Table-Specific Filter > TableName** to create a table-specific filter. All data tables used in the report are listed on this menu.

The screenshot shows the 'Report Configuration' panel for a report titled 'Budget to Actuals | Corporate' through June 2020. The main report area displays a table with columns for 'WorldRegion', 'Q1 2020' (Actuals, Budget, Difference), and 'Q2 2020' (Actuals, Budget). The data rows are for Asia, Corporate, and Europe. On the right, the 'Report Configuration' panel is visible, showing fields for Title, Secondary title, Subtitle, and Report description. The 'Report filters' section shows 'No filters specified' and an 'Add' button. A dropdown menu is open, showing 'General Filter' and 'Table-Specific Filter' options. An orange arrow points to the 'Add' button.

Creating a report-level data filter

3. In the **Filter Wizard**, create your filter as needed, then click **OK**. Note the following:
 - If you are defining a general filter, the Filter Wizard only shows reference tables that the primary table looks up to.
 - If you are defining a table-specific filter, the Filter Wizard only shows the table that you selected from the menu.
 - After building the filter, remember to click **Apply** to move the filter from the **Preview** box to the **Filter** box at the bottom of the dialog. A filter statement must be present in the Filter box when you click **OK**, or else the saved filter will be blank. If you are creating a compound filter, you can click **And** or **Or** to append the preview filter to any currently existing filter in the Filter box.
 - You can manually type a filter statement in the **Filter** box (or load a saved filter), but that filter must follow the same rules as any filter that you would create using the current Filter Wizard context. If the filter statement is not valid within the current context, it may have no effect on the report or cause an error when viewing the report.

The filter is added to the **Report filters** box. You can hover your cursor over the filter name to view details about the filter, such as whether it is a general or table-specific filter, and to view the actual filter statement.



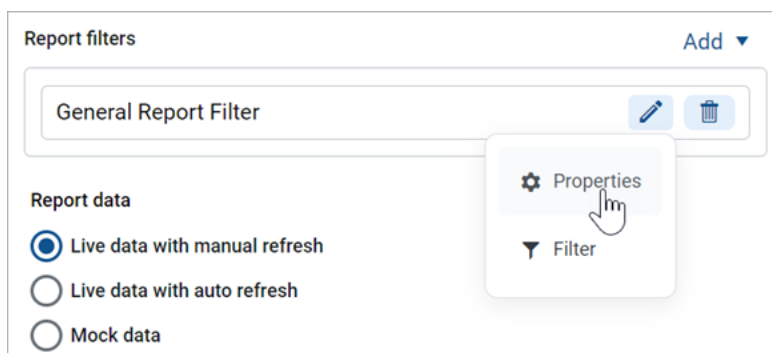
If desired, you can edit the filter properties to give the filter a specific name, define an optional filter description to document the purpose of the filter, and toggle the filter as enabled or disabled. You can also edit the filter statement.

► Editing existing filters

You can edit general filter properties and you can edit the filter criteria statement.

To edit an existing filter:

- Click the Edit icon  next to the filter name, and then select either **Properties** or **Filter**.



If you are editing the filter properties, edit the following fields in the **Edit Filter Properties** dialog as needed, then click **OK**:

Item	Description
Display Name	<p>The display name of the filter. By default, the filter displays in the Report filters box as follows:</p> <ul style="list-style-type: none"> • General filters display using the name General Report Filter. • Table-specific filters display using the name TableName Filter. <p>You can change this name to something more descriptive or specific if you choose. If you change the name so that it is no longer obvious whether the filter is general or table-specific, then you can still view this information using the filter tooltip (as shown in the previous section).</p>

Item	Description
Description	Optional. If desired, you can define a description to document the purpose and scope of the filter.
Enabled	<p>By default, filters are enabled and will impact the data shown in the report. If desired, you can toggle the filter to disabled in order to keep the filter in the report properties for future use, but temporarily disable it. When you are ready to use the filter again, you can toggle it back to enabled.</p> <p>While the filter is disabled, it shows as grayed out in the Report filters section. The filter will not be applied to the data queries in the report.</p>


Example filter properties

If you are editing the filter, the Filter Wizard opens with the current filter shown in the **Filter** box. You can manually adjust the current filter, or you can create a new filter using the wizard to overwrite the existing filter, or you can create a new filter using the wizard and append it to the existing filter using **And** or **Or**. Remember that whatever filter statement is in the Filter box when you click **OK** will become the new filter.

► Deleting existing filters

You can delete a report filter if it is no longer needed. Remember that you can disable the filter instead, if you want to temporarily remove the filter without deleting it from the report (see the previous section).

To delete an existing filter:

1. Click the Delete icon  next to the filter name.
2. When prompted to confirm the deletion, click **OK**.

The filter is deleted from the report.

► General filter notes

General filters are based on reference tables (also often known as dimension tables):

- If the primary table is a data table, you can define a general filter using any reference table that the primary table looks up to.
- If the primary table is a reference table, you can define a general filter using the primary table.

When creating the filter, you can use any column on the reference table, including multi-level lookups through the reference table. For example, if the primary table looks up to Dept, the filter could be `Dept.Dept=24000` or `Dept.Region='West'` or `Dept.Region.RegionType=1`.

The general filter applies to all tables in the report that look up to the reference table (as well as the reference table itself). For example, imagine that you have a report that compares GL2021 to BGT2021. You want to define a filter so that the report only shows data for the West Region. In this case you can define a general filter on the Dept table of `Dept.Region='West'`. Since both tables look up to the Dept table, the general filter will apply to both tables and limit the data in the report.

NOTES:

- If the primary data table looks up to multiple reference tables, the general filter can be a compound filter that uses multiple reference tables. In this case, the filter will only apply to data tables that look up to both reference tables. For example, imagine you define a general filter of `Dept.Region='West'` and `Acct.Category='Revenue'`. If the report contains a table that only looks up to the Acct table but not the Dept table, then the filter will not apply to that table and no error will occur.
- If you define a general filter and then change the primary table of the report to a table that has different reference table lookups, the filter will not cause an error. If the existing filter does not apply to any tables in the report, it will simply be ignored.

► Table-specific filter notes

Table-specific filters apply only to the selected table for the filter. All other tables are unaffected by the filter.

The table-specific filter can use any column in the table, including multi-level lookups. For example, if the selected table is BGT2020, the filter could be `BGT2020.m1<>0` or `BGT2020.Acct.Category='Revenue'`.

Table-specific filters can only be defined on data tables used in the report. If you want to define a filter on a reference table, it must be a general filter.

NOTE: If you define a table-specific filter and then later edit the report configuration so that the table no longer has any columns in the report, the filter will not cause an error. It will simply be ignored.

Configuring grid properties in a web report

The grid properties define the available features and the overall presentation of data in a web report. Using the grid properties, you can configure:

- User interaction properties such as whether users can filter columns, sort columns, and reorder columns
- Display properties such as whether the grid has a total row and whether rows with all zero values display
- Drilling properties such as what type of drilling is enabled and configuration for directed drilling

In the Report Builder, the grid properties are defined in the right-hand Configuration Panel.

To configure grid properties for a web report:

1. In the Report Canvas of the [Report Builder](#), click the grid that displays below the column setup boxes.
2. In the right-hand Configuration Panel, complete the **Grid Configuration** properties as needed.

Budget to Actuals | Corporate
Through June 2020

WorldRegion	Q1 Actuals	Q2 Actuals	Q1 Budget	Q2 Budget
Asia	\$59,064,980	\$58,174,791	\$33,016,385	\$34,789,159
Corporate	\$11,784,872	\$7,370,832	\$6,005,599	\$6,195,873
Europe	\$30,700,879	\$30,422,551	\$1,311,221	\$1,332,025
North America	\$760,941,761	\$750,385,484	\$153,873,112	\$139,542,480
	\$862,492,492	\$846,353,658	\$194,206,317	\$181,859,537

1 - 4 of 4 items

Click the grid area to load the grid configuration properties

Grid Configuration

General Advanced

Column Properties

- ☒ Enable column filters
- ☐ Multi-column sorting
- ☒ Enable reordering columns

Grid Properties

- ☐ Use fixed rows
- ☒ Include total row
- Total row header label
- ☐ Suppress zero rows
- ☐ Enable drilling

Example Grid Configuration properties

The grid configuration properties are separated into two tabs:

- **General:** Basic grid properties that should be reviewed and configured for all web reports.
- **Advanced:** Advanced grid properties such as default column formats for the grid.

► General grid properties

The following grid properties are available for web reports on the **General** tab of the **Grid Configuration** panel:

Column Properties

Item	Description
Enable column filters	<p>Specifies whether users can filter columns in the grid. Only applies to grids with dynamic rows; users cannot filter columns in grids where Use fixed rows is enabled.</p> <ul style="list-style-type: none">• If enabled (default), then filter icons display on columns where Enable filter is enabled in the column configuration properties. Report users can use these icons to filter the data shown in the column. If Enable filter is disabled on a column, the filter icon is not available for that column.• If disabled, then filter icons do not display on any columns, regardless of whether Enable filter is enabled for the column.
Multi column sorting	<p>Specifies whether users can sort by multiple columns in the grid. Only applies to grids with dynamic rows; users cannot filter columns in grids where Use fixed rows is enabled.</p> <ul style="list-style-type: none">• If enabled, then users can sort the grid by multiple columns. If the grid is already sorted by a column and a user clicks another column to sort, then the grid is first sorted by the most recent column and then sorted by the original column. Columns will remain sorted until the user toggles the sort disabled for that column.• If disabled (default), then users can sort the grid by a single column. If the grid is already sorted by a column and a user clicks another column to sort, then the sort is disabled on the original column and the grid becomes sorted by the most recent column. <p>Users can sort columns by clicking on the column header. Each click toggles through sort ascending, sort descending, and no sort.</p> <p>NOTE: The ability to clear the sort is only available if multi-column sorting is enabled. Otherwise, clicking a column header will toggle between sort ascending and sort descending. You can click a different column header to sort by that column, but you cannot clear the sort.</p>

Item	Description
Enable reordering columns	<p>Specifies whether users can reorder columns in the grid.</p> <ul style="list-style-type: none"> • If enabled (default), then users can drag and drop columns within the grid to temporarily reorder them. • If disabled, then users cannot reorder columns in the grid.

Grid Properties

Item	Description
Use fixed rows	<p>Specifies whether the grid uses dynamic rows or a fixed row structure.</p> <ul style="list-style-type: none"> • If enabled, then the grid uses a fixed row structure to define the rows. Select the structure using the Fixed row structure field. For more information, see Specifying the fixed row structure for a web report. • If disabled (default), then the grid dynamically generates rows based on a table column specified as the row dimension. The row dimension is specified by dragging and dropping the desired table column into the Row Dimensions box at the top of the Report Canvas. For more information, see Specifying the row dimension for a web report.
Fixed row structure	<p>Specifies the fixed row structure to use in the grid. Only applies when Use fixed rows is enabled.</p> <p>Select an existing fixed row structure to define the rows of the grid. You can type into the box to filter the list of fixed row structures by name.</p> <p>Fixed row structures can be created from the Intelligence Center. For more information on creating fixed row structures, see Managing Fixed Row Structures.</p>
Include total row	<p>Specifies whether a total row is present on the grid. Only applies to grids with dynamic rows; if Use fixed rows is enabled then the grid uses subtotal and total rows as defined in the fixed row structure.</p> <ul style="list-style-type: none"> • If enabled, then a total row displays at the bottom of the grid. If the grid data is paged, the total row shows the total of all rows across all pages. <p>Use the Total row header label field to define label text for the total row, such as "Total". This text displays in the last row dimension column.</p> <p>Columns displaying numeric, non-dimensional data are included in the total row by default. If desired, you can exclude a numeric column from the total row using the column configuration properties.</p> <ul style="list-style-type: none"> • If disabled (default), then the grid does not have a total row.

Item	Description
Suppress zero rows	<p>Optional. Specifies whether data rows with all zeros are suppressed from showing in the grid. Only applies to grids with dynamic rows; all zero rows cannot be suppressed in grids where Use fixed rows is enabled.</p> <p>Non-key columns that meet both of the following criteria are evaluated to determine whether a row should be hidden:</p> <ul style="list-style-type: none"> • The column data type is Integer (all types) or Numeric. • The column is from the primary table or an additional data table. <p>If the primary table is a data table, Integer and Numeric columns on lookup reference tables are ignored—meaning these columns may have values, but the row is still suppressed if all applicable data table columns have zero values. There is one exception: reference table columns are considered if the column classification is Values and the numeric type is Currency.</p> <p>Calculated columns defined in the grid are not evaluated for this purpose and do not prevent a row from being suppressed.</p>
Enable drilling	<p>Specifies whether users can drill down rows in the grid to view the underlying data.</p> <ul style="list-style-type: none"> • If enabled, then users can drill rows in the grid. Use the Drilling type property to specify what type of drilling options are present: <ul style="list-style-type: none"> ◦ Key columns (default): Users can drill down to the key column level of the data. These drilling options are automatically generated based on the validated key columns of the primary table. No additional setup is required. ◦ Directed: Users can drill down predefined drilling paths. Use the View/Edit Configuration link underneath the Directed option to configure the drilling paths. <p>For more information, see Configuring drilling for web reports.</p> • If disabled (default), then users cannot drill rows in the grid.

NOTE: If you created a web report using the Report Builder in version 2021.1, that report may have had a defined **Data Filter** in the Grid Configuration properties. These filters are now defined at the report level, in the [Report Configuration properties](#). Any existing grid filter will be automatically converted to a general report filter. In rare cases, this conversion may result in report errors if the grid-level filter is not valid as a general report filter. If this occurs, you can delete the converted filter and re-create it as a table-specific filter.

► Advanced grid properties

The following grid configuration properties are available for web reports on the **Advanced** tab of the **Grid Configuration** panel:

Default column formats

Use this section to view and define default column formats for the grid based on column data type. All columns added to the grid will inherit the settings defined here. By default, columns will continue to inherit any changes made to the default column formats unless the format has been overridden at the column level.

For example, the default alignment for String columns is Left. When String columns are added to the grid, they are configured to use the Default alignment, meaning Left. If desired, you can change the default alignment for String columns to Center, and all String columns in the grid that are using the Default alignment will now update to use Center alignment. However, if you have manually configured a particular String column to use Right alignment instead of the Default alignment, that column will continue to use its configured alignment of Right.

Item	Description
Data type	<p>Select a column data type to view and edit the default column formats for that type. The following data types are available:</p> <ul style="list-style-type: none"> • String: Columns containing text or alphanumeric values. Includes table columns using the String data type. • Date: Columns containing dates. Includes table columns using Date or DateTime data types. • Boolean: Columns containing True or False values. Includes table columns using the Boolean data type. • Dimension: Columns containing numeric dimension codes. Includes table columns using Numeric, Integer, or Identity data types, where the Column Classification is Dimension. • Decimal: Columns containing decimal numeric values. Includes table columns using the Numeric data type, where the column has a Numeric Type of Number. • Number: Columns containing whole integer numeric values. Includes table columns using Integer or Identity data types, where the Column Classification is Value. • Currency: Columns containing currency numeric values. Includes table columns using the Numeric or Integer data types, where the column has a Numeric Type of Currency. • Percent: Columns containing percent numeric values. Includes table columns using the Numeric or Integer data types, where the column has a Numeric Type of Percent. <p>Additionally, when you create a calculated column, you can specify its data type as one of the numeric data types. The column will then use the default column formats for that data type. The default data type for calculated columns is Currency.</p> <p>NOTE: Columns that would normally be treated as Number data type are treated as Dimension data type if they are used as row dimension columns or drill columns.</p>
Column width	<p>The default column width for the selected Data Type, in pixels. Enter the desired column width as a whole integer between 30 and 600.</p> <p>The default width for each data type is as follows:</p> <ul style="list-style-type: none"> • Currency, Decimal, Percent, Date, Boolean: 120 • Number: 150 • String, Dimension: 200

Item	Description
Alignment	<p>The default alignment of the column values for the selected Data Type. If you want to change the default alignment for a data type, select one of the following: Left, Right, Center.</p> <p>The default alignment for each data type is as follows:</p> <ul style="list-style-type: none"> • String, Date, Boolean, Dimension: Left • Decimal, Number, Currency, Percent: Right

Numeric properties

Use this section to view and define default number formats for the grid based on column data type. All columns added to the grid will inherit the settings defined here. By default, columns will continue to inherit any changes made to the default number formats unless the column has been configured to use a custom format.

For example, the default number format for the Currency data type uses 0 decimal places, with a thousands separator, and a negative number format of red parentheses. When a Currency column is added to the grid, the contents automatically display using this number format. If desired, you can update the default number format for Currency so that it uses 2 decimal places, and all columns using the Currency number format will now update to show 2 decimal places. This applies to columns that use the Currency number format by default, as well as columns that you have manually configured to use the Currency format. However, if you have changed a column so that it now uses a Custom number format instead of the Currency number format, then it will continue to use its custom configuration.

This section only applies to numeric data types. It does not display for data types such as String or Date.

Item	Description
Decimal places	<p>The number of decimal places used by the selected Data Type. Enter any whole number from 0 to 10. You can also use the arrow keys to move the number up or down.</p> <p>The default number of decimal places for each numeric data type is as follows:</p> <ul style="list-style-type: none"> • Currency: 0 • Decimal, Percent: 2 <p>The Number data type does not use decimals.</p>
Use 1000's separator	<p>Specifies whether the selected Data Type uses a thousands separator:</p> <ul style="list-style-type: none"> • If enabled (default), numbers show with a thousands separator, such as 1,000. • If disabled, numbers do not use a thousands separator, such as 1000.

Item	Description
Negative number format	<p>The format used by the selected Data Type to display negative numbers. Select the desired format from the drop-down list. Available formats use the minus sign, or parentheses, or red text (or a combination of these formats).</p> <p>The default negative number format for each numeric data type is as follows:</p> <ul style="list-style-type: none"> • Decimal, Number, Percent: Minus sign • Currency: Red text in parentheses

► Frequently asked questions

Can I disable paging for a dynamic row grid?

Currently, if the grid uses dynamic rows then the grid is automatically paged if it exceeds 25 rows. This paging cannot be disabled. However, keep in mind that when the grid is exported to PDF or Excel, the paging is automatically disabled and the export file will show all rows.

How do I define a grid-level filter to limit the data in the report?

If you want to filter the data in the grid, you can define a report-level filter. Select the report title on the Report Canvas to load the [Report Configuration properties](#), then use the **Report filters** section to define one or more filters.

Because currently web reports can only contain a single grid, defining a report-level filter is effectively the same as defining a grid-level filter.

Configuring column properties for a web report

The column properties define the presentation of each column in the grid. Using the column properties, you can configure:

- Display properties such as header text, column width, alignment, and number formatting
- Data properties such as column filters, alternate aggregation, and display formats for data
- Grid behavior properties such as inclusion in the total row, and whether end users can sort and filter using the column

In the Report Builder, the column properties are defined in the right-hand Configuration Panel. The column properties can be defined for both table columns and calculated columns.

To configure column properties for a column in a web report:

1. In the Report Canvas of the [Report Builder](#), click a column name in either the Row Dimensions box or the Column Definitions box to select that column.

You must select the column name in the setup boxes and not the column name in the grid below. Selecting a column name in the preview grid causes the Grid Configuration to display instead of the Column Configuration.

2. Complete the **Column Configuration** properties that display in the Configuration Panel.

The screenshot shows the Axiom Intelligence Center interface. On the left is a sidebar with 'Data Context' set to 'GL2020' and a list of search tables and columns. The main area displays a 'Budget to Actuals' report for 'Corporate' through June 2020. The report table has columns: WorldRegion, Q1 Actuals, Q2 Actuals, Q1 Budget, and Q2 Budget. A tooltip points to the 'Q2 Budget' column header with the text 'Click on a column name to configure it'. On the right is the 'Column Configuration' panel, which has two tabs: 'General' and 'Advanced'. The 'General' tab is active, showing properties for the selected column 'BGT2020.Q2'. The properties include: Header (Q2 Budget), Column width (120px), Alignment (Default (Right)), Number format (Default (Currency)), Aggregation (Default (Sum)), and Data filter (No filters defined). There are also checkboxes for 'Enable filter' and 'Hide column'.

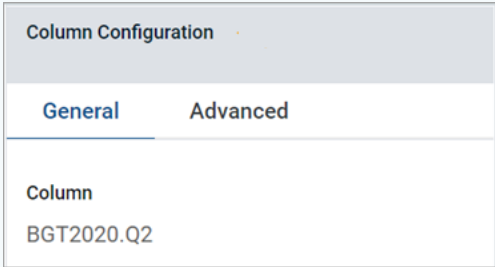
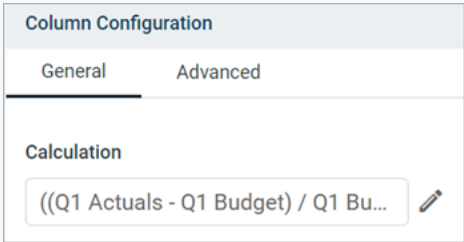
WorldRegion	Q1 Actuals	Q2 Actuals	Q1 Budget	Q2 Budget
Asia	\$59,064,980	\$58,174,791	\$33,016,385	\$34,789,159
Corporate	\$11,784,872	\$7,370,832	\$6,005,599	\$6,195,873
Europe	\$30,700,879	\$30,422,551	\$1,311,221	\$1,332,025
North America	\$760,941,761	\$750,385,484	\$153,873,112	\$139,542,480

The column configuration properties are separated into two tabs:

- **General:** Basic column properties that should be reviewed and configured for all columns in the grid.
- **Advanced:** Advanced column properties to be configured as needed.

► General column properties

The following column properties are available for web reports on the **General** tab of the **Column Configuration** panel. These properties apply to table columns and to calculated columns.

Item	Description
Column or Calculation	<p>The following information displays at the top of the panel to identify the column:</p> <ul style="list-style-type: none"> • Column: If the column is a table column, the full Table.Column path displays for your reference.  <ul style="list-style-type: none"> • Calculation: If the column is a calculated column, a text representation of the calculation displays for your reference. You can click the Edit icon to the right of the box to open the Edit Calculated Column dialog and edit the calculation as needed. 
Header	<p>The header text to display on the column header. Enter the desired header text.</p> <ul style="list-style-type: none"> • If the column is a table column, the column name is used as the header text by default. • If the column is a calculated column, the text "Calculation" is used as the header text by default.
Column width	<p>The width of the column in the grid, in pixels. Enter the desired column width as a whole integer between 30 and 600.</p> <p>The default width depends on the column data type, and is configured at the grid level. If you do not enter a custom width, then the default width displays in the Column width box in gray text. If you leave this default width and the grid-level defaults are changed, then column will update to use the new default width. For more information, see Default column formats.</p>

Item	Description
Alignment	<p>The alignment of the column values. Select one of the following: Default, Left, Right, Center.</p> <p>The default alignment depends on the column data type, and is configured at the grid level. If a column is set to use Default and the grid-level defaults are changed, the column will update to use the new default alignment. For more information, see Default column formats.</p>
Number Format	<p>The number format used by the column. Only applies to columns that hold numeric data. Select one of the following:</p> <ul style="list-style-type: none"> • Default: The column uses the default number format as defined for the column's data type at the grid level. If a column is set to use Default and the grid-level defaults are changed, the column will update to use the new default number format. For more information, see Numeric properties. • Currency, Decimal, Number, Percent, or Dimension: The column uses the default number format as defined for the selected data type. For example, you may have a column that is natively a Decimal column, but you want it to display using Currency format in a particular report. If a column is assigned to a different number format, it will also inherit the default column width and alignment set for the associated data type, if the column is using the default column width and alignment. • Custom: The column uses a custom number format as defined in the column properties. If Custom is selected, then several additional properties become available to configure the number format. In this case, the column is no longer tied to any particular default number format. <ul style="list-style-type: none"> ◦ Decimal places: Specify the number of decimal places to display, from 0 to 10. ◦ Use 1000's separator: Specify whether the number uses a thousands separator or not. ◦ Negative number format: Specify the format to use for negative numbers.
Aggregation	<p>The aggregation type used to aggregate data queried from the database column. Does not apply to calculated columns or to columns used as row dimensions.</p> <p>If you want to override the default aggregation type for a database column, select an aggregation type.</p>

Item	Description
Data filter	<p>Optional. Defines a filter to limit the data shown in this column. The column-level data filter should be used instead of a grid-level data filter when you want the filter to impact just this column.</p> <p>Click the Edit button to open the Filter Wizard and define a filter. Once you have defined a filter, it displays in the Data filter box.</p> <p>If you want to change or remove the filter, click the Edit link again and change or delete the filter within the Filter Wizard. The Data filter box is not directly editable.</p> <p>Data filters defined at the column level are combined with any filters defined at the column group level and at the grid level. All relevant filters are combined using AND to determine the data that can display in a particular column.</p> <p>NOTES:</p> <ul style="list-style-type: none"> • If a data filter is defined for a calculated column, the filter is applied to the columns referenced in the calculation. • Column-level data filters cannot be defined for columns used as row dimensions. To limit the rows shown in the grid, use a report-level filter in the Report Configuration properties.
Enable filter	<p>Specifies whether end users can filter based on the column contents.</p> <ul style="list-style-type: none"> • If enabled (default), and if Enable Column Filters is enabled in the Grid Configuration properties, then a filter icon is available on the column in the rendered report. Users can use this column to filter the grid based on the column contents. • If disabled, then the filter icon is not available on the column. <p>This property does not apply to columns used as row dimensions. It also does not apply to any column in the grid if Use fixed rows is enabled in the Grid Configuration properties. Fixed row reports do not support end-user column filtering.</p>
Hide column	<p>Specifies whether the column is hidden in the report:</p> <ul style="list-style-type: none"> • If enabled, then the column is hidden. The column remains visible in the Report Builder so that you can continue to configure the column as needed. • If disabled (default), then the column is visible.

Item	Description
Show description	<p>Specifies whether you want descriptions to display for dimension values. This option only applies to key columns, alternate key columns, and validated columns that have an associated description column.</p> <ul style="list-style-type: none"> If enabled (default), then descriptions display alongside the dimension values or instead of the dimension values. For example, if the column is Acct then you likely want the account descriptions to display along with the account codes. <p>When this option is enabled, the Description display format field becomes available. Select the desired display format from this list. By default, the format Description (Value) is used.</p> <ul style="list-style-type: none"> If disabled, then only the dimension values display. For example, if the column is Acct then only the account codes will display. <p>NOTE: If the dimension table has multiple description columns (meaning columns where Describes Key is True), then the first description column is used.</p>
Include in total row	<p>Specifies whether the column is included in the total row, if a total row is enabled in the Grid Configuration properties. Select one of the following:</p> <ul style="list-style-type: none"> Default: The column is included or not based on its data type. All numeric columns are included by default unless they are the Dimension data type. All other non-numeric columns are not included by default, unless you change the aggregation so that the column returns a number (such as using Count aggregation on a String column). Include: Override the default behavior and include the column in the total row. Exclude: Override the default behavior and exclude the column from the total row. <p>This option does not apply if Use fixed rows is enabled in the Grid Configuration properties. Columns will be included or excluded in subtotal or total rows using the default behavior.</p>

► Advanced column properties

The following column configuration properties are available for web reports on the **Advanced** tab of the **Column Configuration** panel:

Header Properties

Item	Description
Header text (row 1)	<p>The header text to display on the column header. Enter the desired header text.</p> <p>NOTES:</p> <ul style="list-style-type: none"> • This is the same property that displays on the General tab as Header. The header text can be edited from either tab. • The (row 1) label only displays if Multi-row header has been enabled. In this case, the property defines the header text for the top row of the multi-row header.
Header text (row 2)	<p>The header text to display on the second row of the column header. Enter the desired header text.</p> <p>This property is only available if Multi-row header has been enabled.</p>
Multi-row header	<p>Specifies whether the column header has multiple rows:</p> <ul style="list-style-type: none"> • If enabled, then the header text property updates so that there are two properties: Header text (row 1) and Header text (row 2). The default header text populates row 1. You can define additional text to display on row 2. • If disabled (default), then only one row of header text can be defined. <p>Keep in mind that enabling a multi-row header is different than wrapping header text. If you enable multi-row headers, then you can define two separate rows of header text. A line break separates each row. If autowrap is enabled, then each row of header text wraps individually.</p> <p>If you just want a single row of header text that wraps, you can leave this option disabled and then enable Autowrap header text.</p>
Autowrap header text	<p>Specifies whether header text wraps:</p> <ul style="list-style-type: none"> • If enabled, then header text that exceeds the column width will wrap. If Multi-row header is enabled, both rows of header text will wrap individually. • If disabled (default), then header text that exceeds the column width is truncated. The user can resize the column wider to view the full header text.

Item	Description
Header alignment	<p>The alignment of the header text. Select one of the following: Default, Left, Right, Center. All column headers use Default alignment by default.</p> <p>By default, the header text uses the same alignment as the column contents (as determined by the Alignment property on the General tab). If you leave the header alignment set to Default, then the header alignment will adjust to match the column alignment. If, however, you want the header alignment to be different than the column alignment, you can configure this property.</p>

► Frequently asked questions

I defined a column filter but it isn't impacting the grid data as I expected—why do I still see rows that don't match the column filter?

A column filter only filters the data coming into that specific column. If you want to define a filter that impacts the entire report, including the row data, then you should define a filter at the report level. Select the report title and then use the [Report Configuration properties](#) to define one or more **Report filters**.

To illustrate the difference, imagine the following uses of a filter to only show data from the West region:

- **Report:** When the general filter `Dept.Region='West'` is defined for the report, the entire grid is filtered to only show data from the West region. Row dimension values (such as departments) will only display if they belong to the West region, and column data is limited to only show data for the West region.
- **Column:** When the filter `Dept.Region='West'` is defined on a column, that single column is filtered to only show data from the West region. Other columns and row dimension values are not limited by this filter. You might do this if you want to create a report that shows the different region data in different columns, such as to compare data from the West, East, North, and South regions side-by-side.

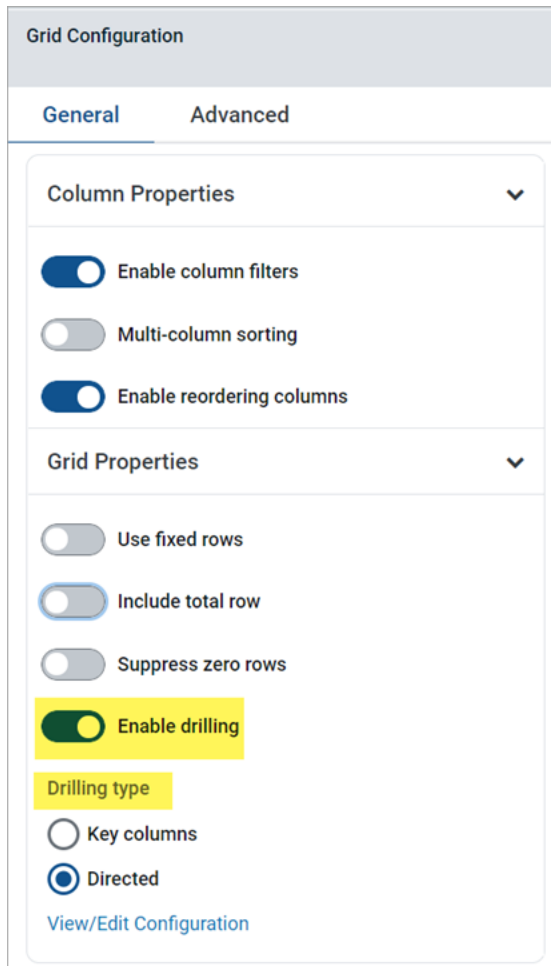
Configuring drilling for web reports

You can enable two types of drilling for web reports:

- **Key columns:** Users can drill to view the underlying data based on the key columns of the table specified as the **Data Context**. This option provides limited "out-of-the-box" drilling functionality that does not require any further setup.
- **Directed:** Users can drill to view the underlying data based on predefined drilling paths. The report designer defines the available drilling paths and can configure certain display attributes for the drill.

To enable either drilling option:

1. In the [Report Builder](#), select the grid so that the **Grid Configuration** properties display in the Configuration Panel.
2. On the **General** tab of the **Grid Configuration** properties, enable **Enable Drilling**.
3. For **Drilling type**, select either **Key columns** or **Directed**.
4. If you selected **Directed**, click the **View/Edit Configuration** link to define the directed drilling paths.



The screenshot shows the 'Grid Configuration' panel with the 'General' tab selected. Under 'Column Properties', 'Enable column filters' and 'Enable reordering columns' are enabled, while 'Multi-column sorting' is disabled. Under 'Grid Properties', 'Use fixed rows', 'Include total row', and 'Suppress zero rows' are disabled. The 'Enable drilling' toggle is highlighted in yellow and is turned on. Below it, the 'Drilling type' section is also highlighted in yellow, showing 'Key columns' as an unselected radio button and 'Directed' as the selected radio button. A 'View/Edit Configuration' link is visible at the bottom of the 'Drilling type' section.

Example drill options enabled for the grid

► Configuring directed drilling paths

Use the **Edit Drilling Configuration** dialog to define the drilling paths for directed drilling.

To define drilling paths:

1. In the **Grid Configuration** properties, click the **View/Edit Configuration** link under the **Directed** drilling option.
2. Drag and drop columns from the table tree to the **Drill Columns** area in the middle of the dialog. The available columns for drilling depend on the table specified as the primary table for the data context:
 - If the primary table is a data table, then you can use any column on the primary table or on a lookup reference table (the Dimension Tables).
 - If the primary table is a reference table, then you can only use column paths that originate from the primary table. The Dimension Tables node is not present, but you can still use columns from those tables by expanding the primary table and selecting the desired columns through the primary table.
3. Place the drill columns in the desired order for the directed drilling. Users can drill from the column at the top of the list down to the column at the bottom of the list. Generally speaking, the lowest level of detail should be at the bottom—for example: VP > Director > Manager > Dept.
 - To reorder columns, click the handle on the left side of the column box to drag and drop the column to a new position.
 - To remove a column, hover your cursor over the column and then click the **X** on the right side of the column box.
4. Select each drill column and configure the drill properties in the right side of the dialog. See the following table for information on these properties.
5. Click **OK** to complete the drill configuration and return to the Report Builder.

Search column name

GL2020

Dimension Tables

ACCT

DEPT

Dept

Description

Template

WorldRegion

Country

Region

Currency

VP

Employees

Managers

Drill columns

1 - DEPT.Country

2 - DEPT.Region

3 - DEPT.Dept

Order the drill columns from highest level to lowest level

Drag and drop columns that you want to use as the drill levels

Column properties

Drill Column

DEPT.Dept

Configure display properties for the drill columns

Header

Department

Column width

300

Alignment

Default (Left)

Show description

Description display format

Description (Value)

Cancel

OK

Example drilling configuration dialog

Drill Column Properties



Item	Description
Drill column	The full Table.Column path of the drill column displays for your reference, so that you know which column you are configuring.
Header	Header text for the column in the drill results. Enter the desired text. The column name is used by default.
Column width	<p>The width of the column in the drill results, in pixels. Enter the desired column width as a whole integer between 30 and 600.</p> <p>By default, the width is 300 for all drill columns, regardless of data type.</p>
Alignment	<p>The alignment of the column values. Select one of the following: Default, Left, Right, Center.</p> <p>The default alignment depends on the column data type. If a column is set to use Default and the grid-level defaults are changed, the column will update to use the new default alignment. For more information, see Default column formats.</p>

Item	Description
Show description	<p>Specifies whether you want descriptions to display for dimension values. This option only applies to key columns, alternate key columns, and validated columns that have an associated description column.</p> <ul style="list-style-type: none"> If enabled (default), then descriptions display alongside the dimension values or instead of the dimension values. For example, if the column is Acct then you likely want the account descriptions to display along with the account codes. <p>When this option is enabled, the Description display format field becomes available. Select the desired display format from this list. By default, the format Description (Value) is used.</p> <ul style="list-style-type: none"> If disabled, then only the dimension values display. For example, if the column is Acct then only the account codes will display. <p>NOTE: If the dimension table has multiple description columns (meaning columns where Describes Key is True), then the first description column is used.</p>

► Using directed drilling

If directed drilling is enabled and configured, you can drill down the predefined drilling paths to view the underlying data. Directed drilling works as follows:

- When you view the report, you can hover your cursor over a row to show the magnifying glass icon on the left side of the row.

WorldRegion	Q1 2020	
	Q1 Actuals	Q1 Budget
 Asia	\$6,989,316	\$5,416,397
 Drill to Country Europe	\$473,158	\$340,531
North America	\$32,766,656	\$35,609,235

- Click the magnifying glass to drill to the first level of the drill. This is the column positioned at the top of the **Drill Columns** list in the **Edit Drilling Configuration** dialog. The drill results open in a new browser tab.
- From here, you can continue to drill by hovering over a row and clicking the magnifying glass to go to the next level of the drill. All subsequent drills are performed in the same browser tab.
- Once you reach the final level of the drill, no more drilling options are available and the magnifying glass no longer displays.

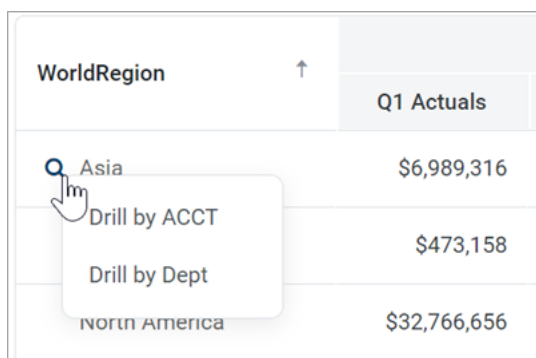
► Using key column drilling

If key column drilling is enabled, you can automatically drill to the key column level to view the underlying data. The available key columns are determined as follows:

- If the primary table used as the data context is a data table, you can drill to the validated key columns on the table. However, any key column used as a row dimension will not be available for drilling, since the report already shows data at that level.
- If the primary table used as the data context is a reference table, you can drill to the key of the reference table, unless the key is used as the row dimension.

When you view the report, you can hover your cursor over a row to show the magnifying glass icon on the left side of the row. From here you can drill as follows:

- If there is only one available key for drilling, click the magnifying glass to drill.
- If multiple keys are available for drilling, click the magnifying glass to show a list of the available keys, then click on the key you want to drill.



The screenshot shows a table with two columns: 'WorldRegion' and 'Q1 Actuals'. The 'WorldRegion' column has three rows: 'Asia', 'North America', and a partially visible 'South America'. A magnifying glass icon is positioned over the 'Asia' row. A dropdown menu is open, showing two options: 'Drill by ACCT' and 'Drill by Dept'. The 'Q1 Actuals' column shows values: '\$6,989,316' for Asia, '\$473,158' for North America, and '\$32,766,656' for South America.

WorldRegion	Q1 Actuals
Asia	\$6,989,316
North America	\$473,158
South America	\$32,766,656

The drill results open in a new browser tab. If multiple keys were available for drilling, you can optionally drill the drill results to view the other key(s).

If no keys are available for drilling, then the magnifying glass does not display when you hover your cursor over the row.

► Presentation of drill results

When you drill, the drill results display in the same browser tab, replacing the original report grid. The data contents of the drill results are as follows:

- The row dimension(s) of the original report are removed from the grid and replaced with the current drill column. The drill column is either the current column of a directed drilling path, or the selected key column.
- All other columns of the report are included in the drill results and show data for the current drill level.
- If the drill results contain multiple rows of data, the grid includes a total row. If the drill results contain a single row of data, the total row is omitted.

- Drill results are paged if the results contain many rows.

The current drill path displays along the top of the page. The drill path identifies the row that was drilled and the current drill level. If you have drilled the drill results, the previous drill levels also display in the drill path. You can click a previous drill level to return to that level, or you can click the X icon to clear the drill and return to the original report grid.

The drill column displays as follows:

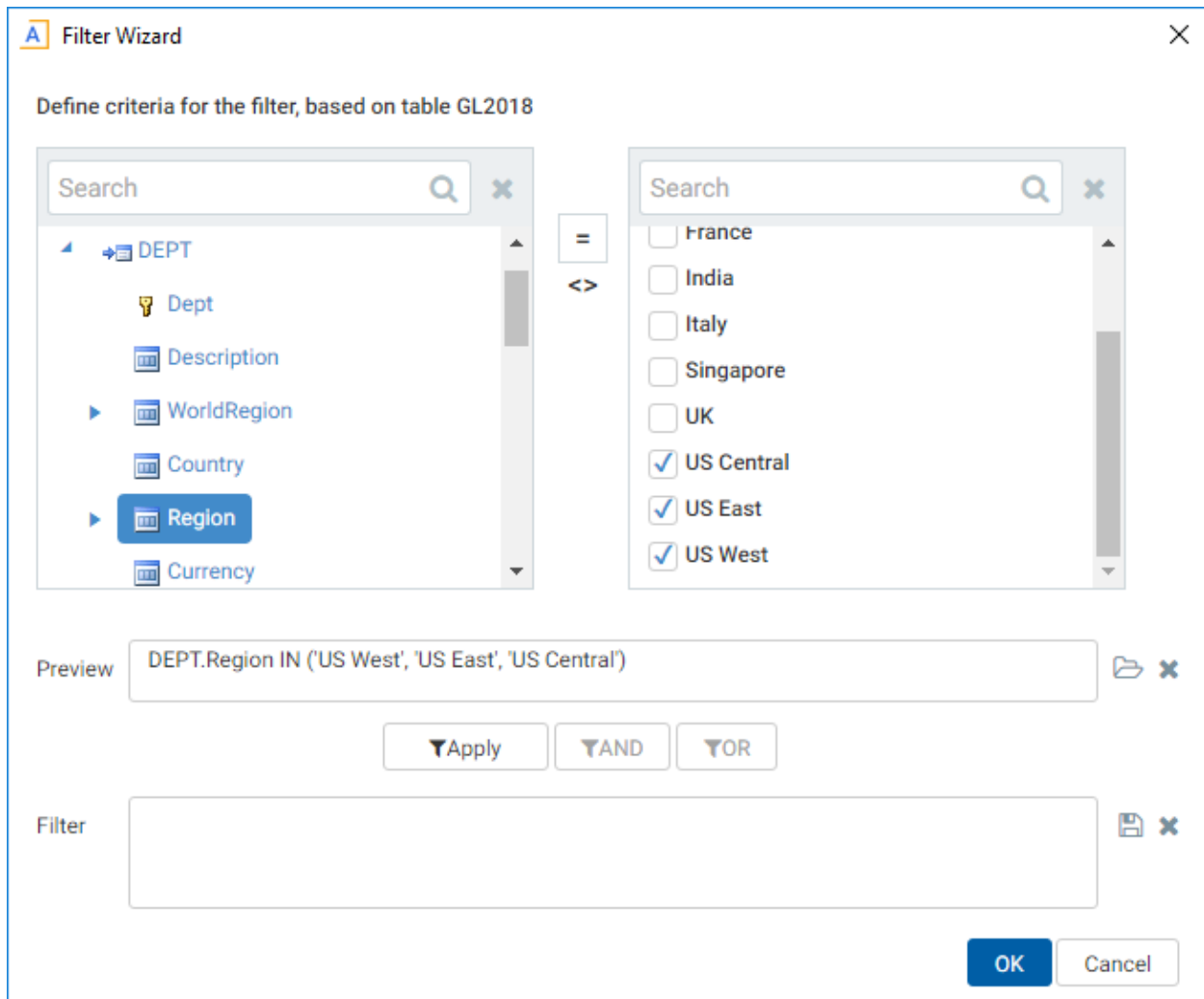
- For key column drilling, the column alignment and width are determined by the column data type. The header text is the key column name. Key column values are presented as Description (Value).
- For directed drilling, the column alignment, width, and header text are as configured in the **Edit Drilling Configuration** dialog.

Intelligence Center				
<div> <div></div> <div> <div></div> <div></div> </div> </div>				
<div> <div> <div>Budget to Actuals</div> <div> Corporate</div> </div> <div>Through June 2020</div> </div>				
<div> <div> <div>Drill Path</div> <div>X</div> </div> <div> <div>WorldRegion = Europe</div> <div>By Country</div> </div> <div> <div>Country = Italy</div> <div>By Region</div> </div> </div>				
<div>Region</div> <div>↑</div>	Q1 2020			
	Q1 Actuals	Q1 Budget	Difference	
Italy Sales Region (Italy)	\$311,465	\$8,964	3,374.62%	

Example drill results with drilling path displayed at the top

Using the Filter Wizard

The Filter Wizard is available in various locations to assist you in building a valid filter criteria statement.



Example Filter Wizard

The tables available in the wizard depend on the current context. For example, if you are creating a data filter for a web report, the wizard only shows valid tables in relation to the specified primary table. In other areas, the tables in the wizard may be limited based on other factors.

To create a filter:

1. In the left-hand side of the dialog, select the table column on which you want to base the filter.

For example, if you want to create a filter such as `DEPT.DEPT>=5000`, then you must select the DEPT column from the DEPT table.

To find the desired table and column, you can filter the list by typing into the Search box. The filter matches based on table and column names.

Once you select a table column, the values in that column display in the right-hand side of the dialog.

TIP: Alternatively, you can use the folder icon to the right of the **Preview** box to load a previously saved filter from the Filters Library. If you do this, your selected filter is placed in the Preview box, overwriting any current content in the preview. Skip to step 4.

2. In the right-hand side of the dialog, select the value(s) on which you want to base the filter.

You can type into the filter box below the list of values to filter the list. Your current typed value is always placed at the top of the list. You can select this typed value regardless of whether it currently matches an actual value in the column. This behavior is to allow you to create a filter for empty tables, or for tables where the value you want to filter on is not yet present in the column. This is why you may see the "no matches" message but still have one value in the list—your typed value.

3. In the space between the two selection boxes, select the operator to use for the filter criteria statement, such as equals, not equals, greater than, or less than. By default, the filter statement uses equals (=).

Note the following about filter operators:

- Greater than / less than options are only available if the column data type holds numbers or dates.
 - If multiple items are selected, then IN and NOT IN syntax is automatically used for equals and not equals respectively.
 - If the column is a string column and the value contains an apostrophe (such as O'Connor), the wizard automatically converts this value to double apostrophes so that it is valid for use in the filter (O'Connor). Apostrophes in string values must be escaped this way so that they are not interpreted as the closing apostrophe for the filter criteria statement.
 - The LIKE operator is supported, but is not available for selection in the Filter Wizard. You must manually edit the filter criteria statement if you want to use it. Only advanced users with knowledge of valid SQL LIKE syntax should do this.
4. Review the filter criteria statement in the **Preview** box to ensure that it is as intended. If you need to make changes, you can manually edit the statement, or you can start again with a new statement. If you want to clear the statement, click the **X** icon to the right of the Preview box.
 5. If no filter is currently present in the **Filter** box, click **Apply** to move the filter down to the Filter box. If a filter is currently present in the Filter box, you can do one of the following:
 - Click **Replace** to overwrite the current filter with the preview filter.
 - Click **AND** or **OR** to add the preview filter to the current filter. This creates a compound criteria statement.

You can repeat the filter creation process as many times as necessary to create the desired statement. You can also manually modify the filter in the Filter box as needed, such as to add parentheses to group statements.

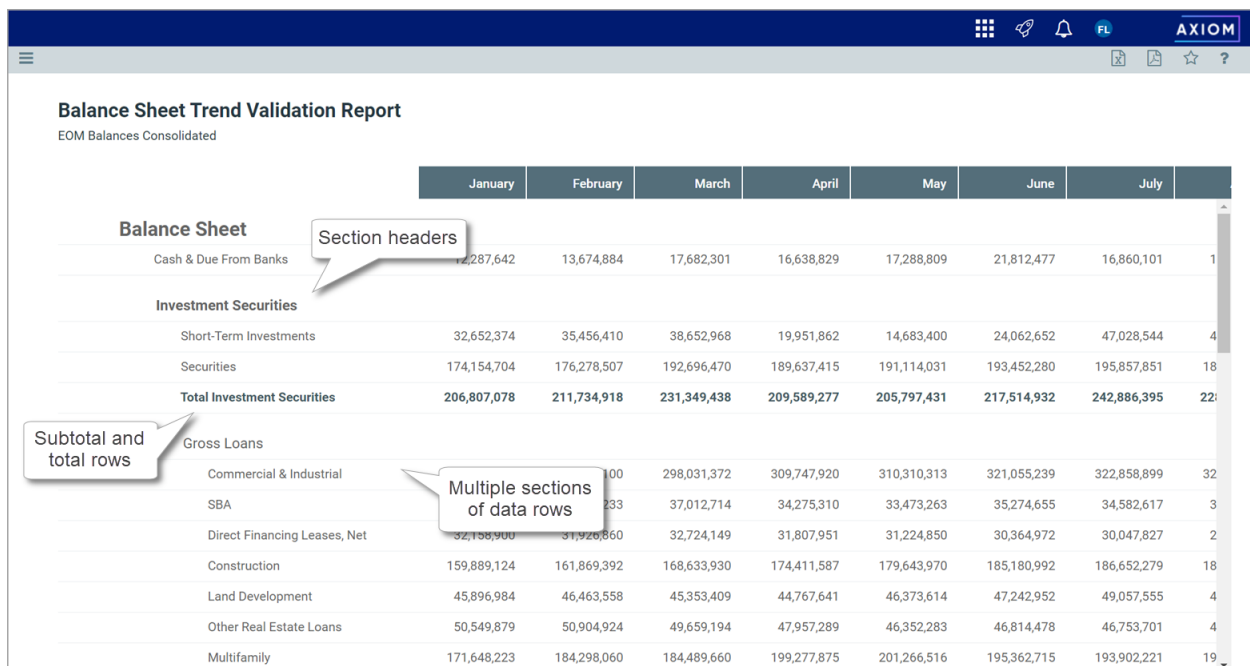
6. When the filter in the Filter box is complete, click **OK**.

TIP: If you want to save the filter you have created for future use, click the save icon to the right of the Filter box. You can select a folder location in the Filters Library (or My Documents if applicable), and specify a name for the filter. This option is only available if you have read/write access to at least one location where filters can be stored.

Managing Fixed Row Structures

Fixed row structures can be used to define data sections for a web report, including section headers, data rows, subtotals, and totals. Fixed row structures are defined separately so that you can reuse them with different web reports, and so that you can update the row structure in one place and have the changes propagate to all reports that reference the structure.

Fixed row structures can be used with "custom" web reports created in the Report Builder, and with web report templates provided by installed Axiom Strategy Management products. The fixed row structure defines the data sections in the report, while the web report defines other report properties such as the data columns, filters, and drilling options.




Balance Sheet Trend Validation Report
EOM Balances Consolidated

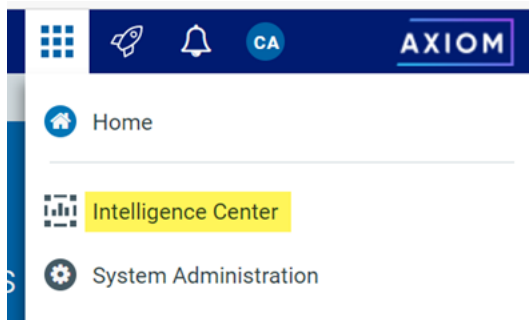
	January	February	March	April	May	June	July	
Balance Sheet								
Cash & Due From Banks	12,287,642	13,674,884	17,682,301	16,638,829	17,288,809	21,812,477	16,860,101	1
Investment Securities								
Short-Term Investments	32,652,374	35,456,410	38,652,968	19,951,862	14,683,400	24,062,652	47,028,544	4
Securities	174,154,704	176,278,507	192,696,470	189,637,415	191,114,031	193,452,280	195,857,851	18
Total Investment Securities	206,807,078	211,734,918	231,349,438	209,589,277	205,797,431	217,514,932	242,886,395	22
Gross Loans								
Commercial & Industrial	32,155,900	31,926,860	298,031,372	309,747,920	310,310,313	321,055,239	322,858,899	32
SBA			37,012,714	34,275,310	33,473,263	35,274,655	34,582,617	3
Direct Financing Leases, Net			32,724,149	31,807,951	31,224,850	30,364,972	30,047,827	2
Construction	159,889,124	161,869,392	168,633,930	174,411,587	179,643,970	185,180,992	186,652,279	18
Land Development	45,896,984	46,463,558	45,353,409	44,767,641	46,373,614	47,242,952	49,057,555	4
Other Real Estate Loans	50,549,879	50,904,924	49,659,194	47,957,289	46,352,283	46,814,478	46,753,701	4
Multifamily	171,648,223	184,298,060	184,489,660	199,277,875	201,266,516	195,362,715	193,902,221	19

Example report using a fixed row structure

You can define as many different fixed row structures as you need. A row structure can be used with any web report where the structure's row dimensions are compatible with the report's columns, filters, drilling options, and any other report property that impacts queried data. Row structures can be created, edited, and deleted using the [Intelligence Center](#).

To access the Intelligence Center:

- Click the menu icon  in the Global Navigation Bar. From the Area menu, select **Intelligence Center**.



Fixed row structures are not file-based—they are stored directly in the database. There is no file type or library folder for fixed row structures, and you cannot see them in Axiom Explorer. The only place to view and manage fixed row structures is using the Intelligence Center.

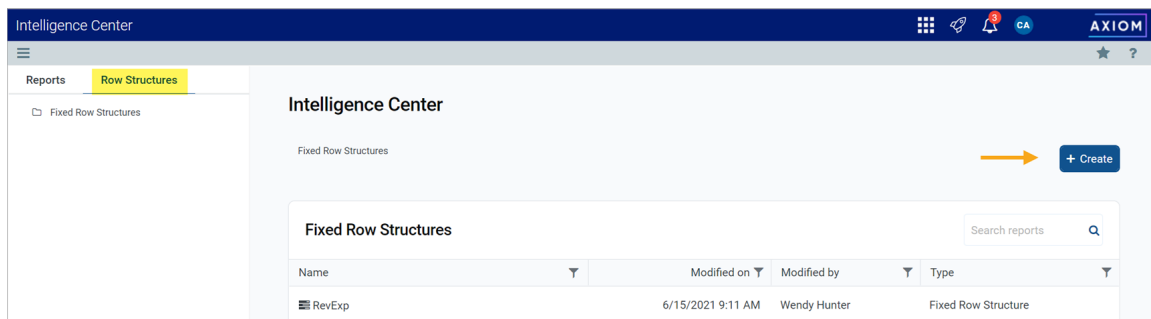
► Creating fixed row structures

You can create new fixed row structures as needed for use in web reports.

In order to create a fixed row structure, you must be an administrator or have the **Create Web Reports** security permission. If you do not have permission to create web reports, then the option to create a new fixed row structure will not be available in the Intelligence Center.

To create a new fixed row structure:

1. In the **Intelligence Center**, select the **Row Structures** area from the left-hand panel, then click **Create**.




The row structure editor opens in the current browser tab, showing a new blank row structure. The row structure starts with just a top-level section header and a grand total row.

The screenshot displays the Axiom Row Editor interface. On the left, the 'Row Editor' panel shows a table with two rows: 'Root Section' and 'Grand Total'. The 'Root Section' row is highlighted in blue. On the right, the 'Row Structure' panel contains configuration options. Under 'ROW STRUCTURE PROPERTIES', there is a text field for 'Row Structure Name (required)' with the value 'New Fixed Row Structure', a dropdown for 'Dimension Table (required)', and a toggle switch for 'Use Dimension Mapping' which is currently disabled. Below this, the 'Section Properties' section includes a toggle for 'Show Section Header' which is enabled. Under 'SECTION HEADER PROPERTIES', there is a text field for 'Header Text' with the value 'Root Section' and a dropdown for 'Header Category' with the value 'Default'. A 'Save' button is located at the top right of the interface.

Example new blank row structure

2. In the top of the right-hand panel, complete the following required properties for the row structure:

Item	Description
Row Structure Name	Enter the name of the row structure. The name identifies the row structure so that users can select it when creating a new fixed report.
Dimension Table	Specify the dimension table to use for the Filter Wizard when defining row data. For example, if rows will be defined using accounts or account groupings, select the ACCT table.
Use Dimension Mapping	<p>Enable this toggle switch if you want to map specific items in the dimension table to specific rows in the structure. When using dimension mapping, all row data is defined at the key column level of the dimension table, and each dimension item can only be assigned to a single row. The toggle switch shows as green when enabled and as gray when disabled.</p> <p>If this option is not enabled, then row data is determined by defining filter criteria statements at the row and section level. For more information, see Using dimension mapping versus row filters in a fixed row structure.</p>



Row Structure

ROW STRUCTURE PROPERTIES

Row Structure Name (required)

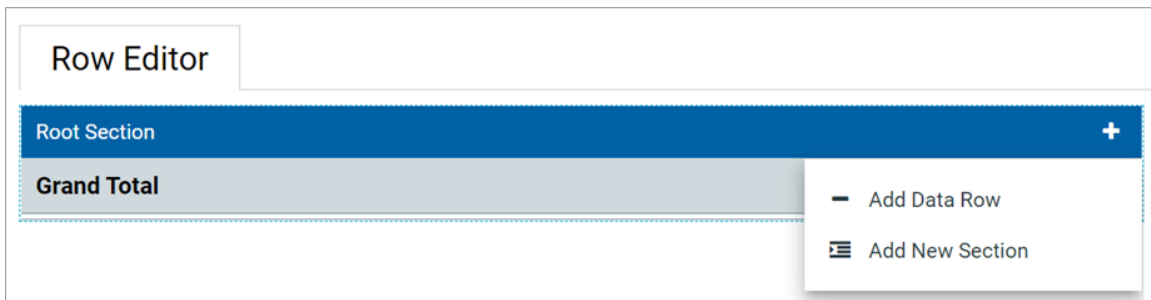
Dimension Table (required)

☒ Use Dimension Mapping

Example required properties with dimension mapping enabled

Once these items are completed, you can use the **Save** button to save the row structure.

3. In the left-hand row editor, add sections and data rows as desired to create the overall row structure. Think of the Root Section as the overall "wrapper" in which all row sections are placed. To create the first row section, click the plus icon on the **Root Section** header and then select **Add New Section**.



Row Editor

Root Section +

Grand Total

- Add Data Row
- + Add New Section

Your row structure will now look like this:



Row Editor

Root Section

Section + -

New Data Row 1

New Data Row 2

New Data Row 3

Section Total

Grand Total

You can then continue to add data rows or additional sections:

- **To add a section**, select the section header where you want to add the section, then click the plus icon > **Add New Section**. The new section is added as a subsection to the current section. By default, all new sections contain a section header row, three data rows, and a total row. You can add or remove data rows as needed.
- **To add a data row within a section**, select the section header where you want to add the data row, then click the plus icon > **Add Data Row**. The new data row is added to the current section.

When you add a new data row or section, it is always added at the bottom of the current section. You can drag and drop the row or section to a different location within the section as needed (but not to a different section).

If a data row or a section is not needed, select the row or section header and then click the trash can icon. The row or section is deleted from the row structure.

NOTE: Header rows and total rows cannot be deleted from a section. The trash can icon on a section header row is used to delete the entire section, not the header row. If you do not want a particular section to display a header row or a total row, you can hide these rows on a per section basis using the Section Properties.

4. For each section in the report—including the Root Section—configure the properties for that section. To configure a section, select the section header and then complete the **Section Properties** in the right-hand panel. The section properties control the following:
 - Visibility, text, and style of the section header row
 - Visibility, text, placement, and style of the section total row
 - Whether data rows are indented from the parent section
 - Whether section data is added or subtracted when calculating the parent total
 - An optional data filter to apply to all data rows in the section (only available if the structure does not use dimension mapping)

For more information on all of the section properties, see [Section properties](#).

Row Editor

Dimension Mapping

Show Hidden Items

My Report

Revenue	
Revenue Line 1	
Revenue Line 2	
Revenue Line 3	
Revenue Total	
Expenses	
Expenses Line 1	
Expenses Line 2	
Expenses Line 3	
Expenses Total	
Grand Total	

Row Structure

ROW STRUCTURE PROPERTIES

Row Structure Name (required)

MyStructure

Dimension Table (required)

ACCT

Use Dimension Mapping

Section Properties

SECTION HEADER PROPERTIES

Show Section Header

Header Text

Revenue

Header Category

Default

SECTION TOTAL PROPERTIES

Show Section Total Row

Total Row Placement

Below

Total Row Text

Revenue Total

Total Row Category

SubTotal3

SECTION PROPERTIES

Indent Child Rows

In most cases, the row structure immediately updates to reflect section properties that affect the display. For example, if you define header text, that text is immediately shown on the row structure. However, if you hide the section header row, the row will continue to display in the row structure unless you disable the option **Show Hidden Items**. This option is located at the top right of the row editor, under the Save button. By default, the row editor continues to show hidden section headers so that you can use the Add Data Row and Add New Section actions on the header row.

- For each data row in the report, configure the properties for that row. To configure a row, select the row and then complete the **Row Properties** in the right-hand panel.

At minimum, the row properties define the label text for the row. If the structure does not use dimension mapping, then the row properties also define a data filter to determine the data to be shown on the row. For more information on defining the row properties, see [Row properties](#).

Row Editor

Dimension Mapping

Show Hidden Items

My Report

Revenue	
Revenue Line 1	
Revenue Line 2	
Revenue Line 3	
Revenue Total	
Expenses	
Expenses Line 1	
Expenses Line 2	

Row Structure

ROW STRUCTURE PROPERTIES

Row Structure Name (required)

MyStructure

Dimension Table (required)

ACCT

Use Dimension Mapping

Data Row Properties

Row Text

Revenue Line 1

6. If **Use Dimension Mapping** is enabled for the row structure, click the **Dimension Mapping** tab to map dimension elements to each row. This mapping determines the data to be shown on each row, instead of defining a filter. For more information on mapping dimension elements, see [Using the Dimension Mapping editor](#).
7. Click **Save** to save the row structure.

The new row structure can now be used when creating or editing web reports.

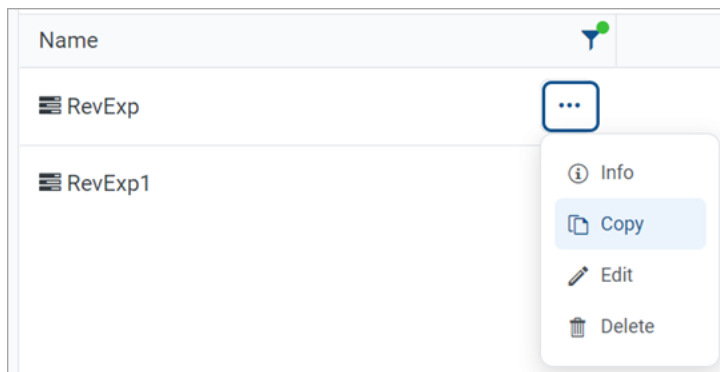
► Copying fixed row structures

You can copy existing fixed row structures as needed to create additional fixed row structures.

In order to copy a fixed row structure, you must be an administrator or have the **Create Web Reports** security permission. If you do not have permission to create web reports, then the Copy action is disabled.

To copy a fixed row structure:

1. In the [Intelligence Center](#), select the **Fixed Row Structure** area from the left-hand panel.
2. Locate the fixed row structure that you want to copy, then hover your cursor over the **Name** column to make the three dots icon visible. Click the icon then select **Copy** from the menu.



3. In the **Copy Fixed Row Structure** dialog, enter a **Name** for the new fixed row structure, then click **OK**. By default, the name is **Copy of OriginalName**.

The fixed row structure is copied with the specified name. You can now open this fixed row structure for editing.

► Editing fixed row structures

Any user can edit a fixed row structure. The **Create Web Reports** permission is not required.

Keep in mind that when a row structure is assigned to a report, that report always uses the most current version of the row structure. Any edits that you make to a row structure are immediately available in any reports that use the row structure.

To edit a fixed row structure:

1. In the [Intelligence Center](#), select the **Fixed Row Structure** area from the left-hand panel.
2. Locate the fixed row structure that you want to edit, then click on the row structure name to open it.

TIP: You can also select **Edit** from the actions menu (using the three dots icon) to edit the fixed row structure.

The row structure opens in the row structure editor, in the current browser tab.

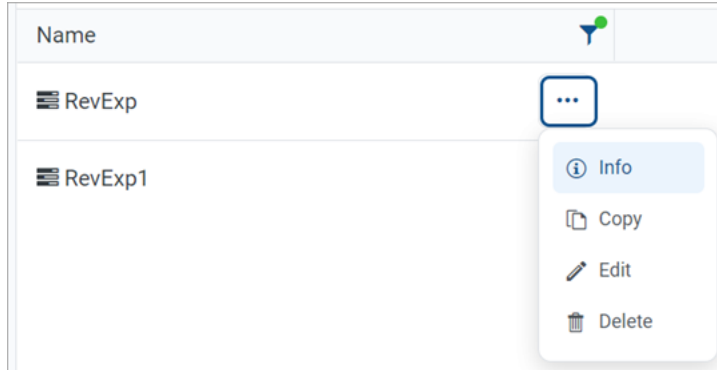
3. Using the [row structure editor](#), make changes to the row structure as needed.
4. Click **Save** to save your changes.

► Changing fixed row structure names and descriptions

You can rename a fixed row structure or change its description. If existing reports use the fixed row structure, those reports will continue to reference the renamed structure.

To change a fixed row structure name and/or description:

1. In the [Intelligence Center](#), select the **Fixed Row Structure** area from the left-hand panel.
2. Locate the fixed row structure that you want to edit, then hover your cursor over the **Name** column to make the three dots icon visible. Click the icon then select **Info** from the menu.



The Information panel opens along the right-hand side of the page.

3. In the Information panel, edit the fixed row structure **Name** or **Description** as needed, then click **Apply**.

The name can be up to 250 characters, and the description can be up to 2000 characters.

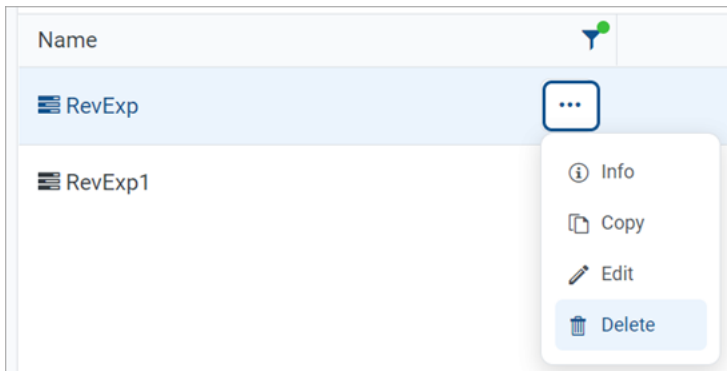
► Deleting fixed row structures

Any user can delete a fixed row structure. The **Create Web Reports** permission is not required. If the fixed row structure was used by any web reports, those reports will no longer function correctly until they are edited to use a different fixed row structure.

IMPORTANT: If the deleted fixed row structure was used by a web report built from a template, that report will no longer work. Currently, there is no way to edit the row structure assignment for template-based reports. If the report is still needed, it must be re-created from template with a different fixed row structure.

To delete a fixed row structure:

1. In the [Intelligence Center](#), select the **Fixed Row Structure** area from the left-hand panel.
2. Locate the fixed row structure that you want to delete, then hover your cursor over the **Name** column to make the three dots icon visible. Click the icon then select **Delete** from the menu.



3. When you are prompted to confirm that you want to delete the structure, click **OK**.

The structure is deleted from the system and no longer displays in the Intelligence Center.

Using the Row Editor

Using the Row Editor, you can define fixed row structures for use in web reports. Fixed row structures define the following:

- The sections to be displayed in the report, including section titles and subtotal rows
- The data rows to be displayed within each section

When you use the Intelligence Center to [create a new fixed row structure](#) or to [edit an existing fixed row structure](#), it opens in the fixed row structure editor.

► Overview

By default, the Row Editor consists of two primary areas:

- The section editor on the left-hand side, where you can add, reorder, and remove sections and data rows
- The property editor on the right-hand side, where you can define properties for the overall row structure, the selected section, or the selected row

Row Editor

My Report

Revenue
Revenue Line 1
Revenue Line 2
Revenue Line 3
Revenue Total

Expenses
Expenses Line 1
Expenses Line 2
Expenses Line 3
Expenses Total

Grand Total

Row Structure

ROW STRUCTURE PROPERTIES

Row Structure Name (required) MyStructure2

Dimension Table (required) ACCT

Use Dimension Mapping

SECTION PROPERTIES

SECTION HEADER PROPERTIES

Show Section Header

Header Text Revenue

Header Category Default

SECTION TOTAL PROPERTIES

Show Section Total Row

Total Row Placement Below

Total Row Text Revenue Total

Total Row Category SubTotal3

Save

Show Hidden Items

Add sections and data rows to build the row structure

General row structure properties

Properties for the currently selected section

Row structure editor with a selected section

Row Editor

My Report

Revenue
Revenue Line 1
Revenue Line 2
Revenue Line 3
Revenue Total

Expenses
Expenses Line 1
Expenses Line 2
Expenses Line 3
Expenses Total

Grand Total

Row Structure

ROW STRUCTURE PROPERTIES

Row Structure Name (required) MyStructure2

Dimension Table (required) ACCT

Use Dimension Mapping

Data Row Properties

Row Text Revenue Line 1

Data Filter Filter Wizard

ACCT.ACCT = 4000

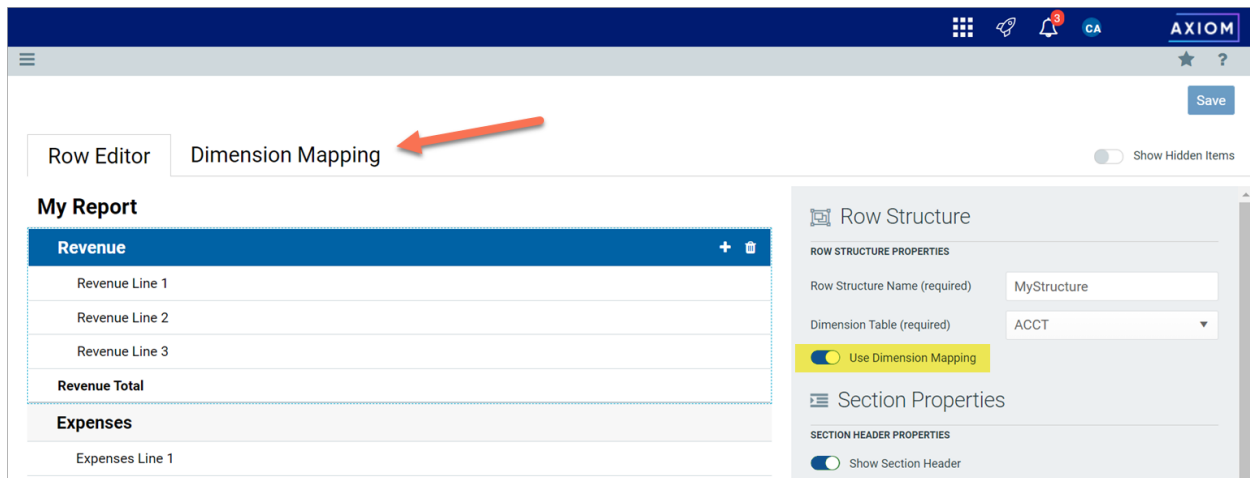
Save

Show Hidden Items

Properties for a selected data row in a section

Row structure editor with a selected data row

If the row structure is configured to **Use Dimension Mapping** to define the row data, then another area is available via the **Dimension Mapping** tab. You can use the Dimension Mapping area to map dimension items to individual data rows. For more information on using dimension mapping, see [Using the Dimension Mapping editor](#).



Row structure editor with Dimension Mapping tab

To save the row structure after making changes, use the **Save** button located at the top right of the editor.

Certain parts of the row structure can be configured as hidden, such as section header rows or total rows. By default, these hidden items no longer display in the editor. If you need to view these items so that you can work with them and configure them, you can toggle the option **Show Hidden items** at the top right of the editor.

► Using dimension mapping versus row filters in a fixed row structure

When you build a fixed row structure, there are two different ways to define the data to be shown each in row:

- **Filters:** Each row can have a filter criteria statement that defines the data for that row. For example, `Acct.Acct=4100` or `Acct.Category='Revenue'`.
- **Dimension mapping:** Each row can be assigned one or more items in a specified dimension. For example, if `Acct` is the specified row dimension, then you can view the list of accounts and map them to specific rows in the report as needed.

The filter option is the most flexible way to build a fixed row structure, because:

- You can use any valid filter criteria statement to define the data in each row, including compound statements using AND or OR, and referencing any table (not just the specified dimension table).
- You can define filters at the section level, which then combine with all row-level filters in the section.
- You can repeat dimension elements within the row structure—for example, to create multiple sections that show revenue for different regions or lines of business.

However, because the filter option is more flexible, it also requires a more advanced level of knowledge about your data structures. You must take care not to create invalid or conflicting filters, and make sure that your filters result in the data that you want to display in the report.

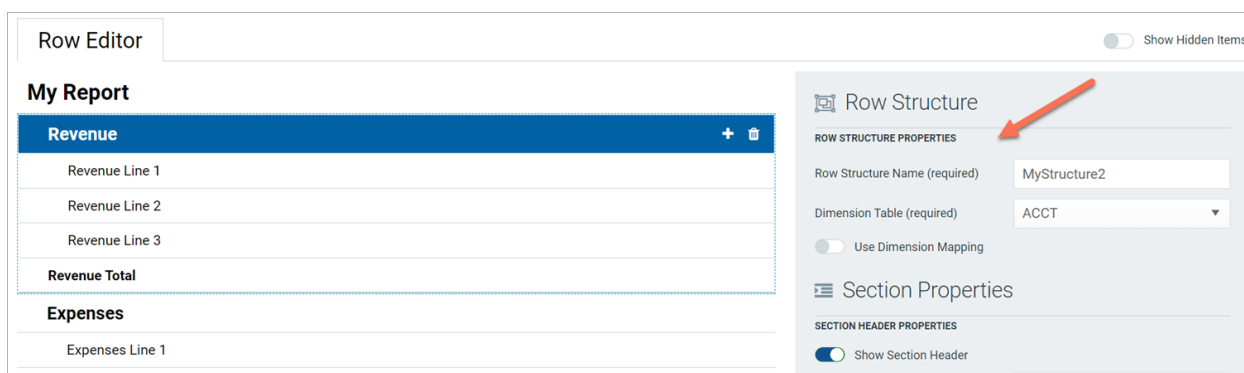
In contrast, the dimension mapping option is the easiest to set up, because:

- You are presented with a full list of all items in the specified dimension, which you can search and filter as needed.
- To assign an item to a row in the report, you simply select the item and then click the arrow button to move it over to the row. Each row can be assigned as many items in the dimension as needed.
- It is very easy to see exactly which dimension items will display on each row, and to see which items have not yet been assigned to rows.

However, the dimension mapping option is less flexible. Rows can only display data from the specified row dimension, and each item in the dimension can only be assigned to a single row.

► Row structure properties

The following required properties at the top of the right-hand pane apply to the entire row structure.



The screenshot shows the 'Row Editor' interface. On the left, a report titled 'My Report' is displayed with a table structure. The table has a header row 'Revenue' and several data rows: 'Revenue Line 1', 'Revenue Line 2', 'Revenue Line 3', 'Revenue Total', 'Expenses', and 'Expenses Line 1'. On the right, the 'Row Structure' properties pane is open. It contains the following fields: 'Row Structure Name (required)' with the value 'MyStructure2', 'Dimension Table (required)' with the value 'ACCT', and a toggle for 'Use Dimension Mapping' which is currently off. Below these are 'Section Properties' and 'Section Header Properties' sections, with a toggle for 'Show Section Header' which is currently on. A red arrow points to the 'Row Structure' title in the right-hand pane.

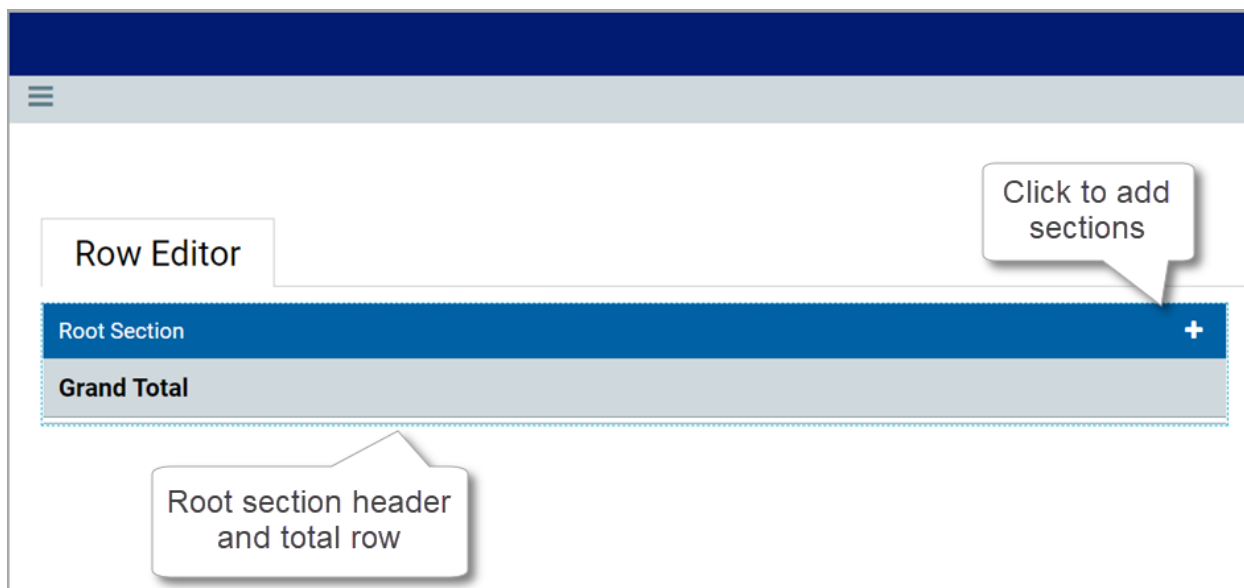
Example Row Structure properties area

Item	Description
Row Structure Name	The name of the row structure. The name identifies the row structure so that it can be selected when creating or editing a web report.

Item	Description
Dimension Table	<p>The primary dimension table to be used on the data rows. You can select any reference table in your system.</p> <p>This selection is used as follows:</p> <ul style="list-style-type: none"> By default, it determines the table available to the Filter Wizard when defining filters for sections and data rows. For example, if the dimension table is Acct, then you can use the Filter Wizard to build filters based on Acct. <p>NOTE: When using filters to define the data in sections and rows, the dimension table is simply a default table. If you want to define a filter using a different dimension, then you can manually enter a filter criteria statement using that dimension.</p> <ul style="list-style-type: none"> If Use Dimension Mapping is enabled, then it determines the dimension table for the row mappings. For example, if the dimension table is Acct, then you can map one or more accounts to each data row. In this case, data rows can only use the dimension table.
Use Dimension Mapping	<p>Specifies whether the data in data rows is defined by using filters or by using dimension mapping. By default, this is disabled, so data is defined using filters. If instead you want to use dimension mapping for the rows, click the toggle switch to enable this option. The toggle switch shows as green when enabled and as gray when disabled.</p> <p>If Use Dimension Mapping is enabled, the row structure editor updates as follows:</p> <ul style="list-style-type: none"> A new tab named Dimension Mapping becomes available next to the Row Editor tab. You can use this tab to define dimension mappings for the rows. Typically, you should define the sections and rows in the structure first, then go to the Dimension Mapping tab to assign mappings to each row. The Filter fields in the Section Properties and the Row Properties become hidden, because they do not apply when using dimension mapping. If a filter is defined for a section or a row before dimension mapping is enabled, the filter is retained in the properties (assuming it was saved) but it will be ignored in reports. <p>For more information on the differences between using filters or dimension mapping to define data rows, see Using dimension mapping versus row filters in a fixed row structure.</p>

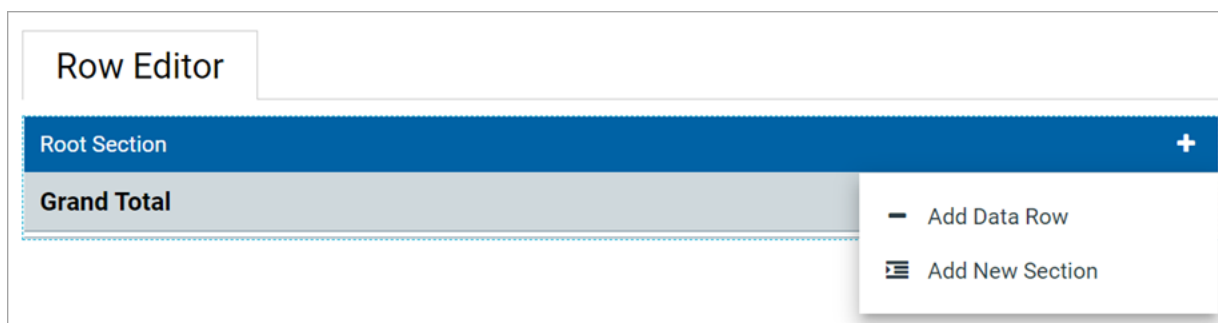
► Adding, removing, and reordering sections

Using the **Row Editor** tab, you can build your row structure by adding, removing, or reordering sections. Each row structure starts with a top-level root section that includes an optional header and an optional grand total.



Row editor with starting root section

To add new sections to the row structure, select the section header row—the **Root Section** row—and then click the plus sign and select **Add New Section**.



Option to add a new section

The new section is added within the root section. You can continue to add as many sections as needed at this level.

Row Editor	
Root Section	
<div> <div>Section 1</div> <div>+</div> <div>🗑</div> </div>	
New Data Row 1	
New Data Row 2	
New Data Row 3	
Section Total	
<div>Section 2</div>	
New Data Row 1	
New Data Row 2	
New Data Row 3	
Section Total	
Grand Total	

Row editor with two newly added sections

To add subsections within a section, select the section header row for any section, and then click the plus sign and select **Add New Section**. The new subsection is added to the current section. You can nest as many section levels as you need by adding subsections to sections.

Row Editor	
Root Section	
Section 1	
New Data Row 1	
New Data Row 2	
New Data Row 3	
Sub Section 1 + 🗑️	
New Data Row 1	
New Data Row 2	
New Data Row 3	
Section Total	
Section Total	
Section 2	

Row editor with newly added subsection

Newly added sections use default text and styling, which can be configured for each section. Each newly added section consists of the following by default:

- A **header row** to display optional header text for the section. If you do not want a header row to display for a particular section (including the root section), you can hide it by disabling **Show Section Header** when configuring the section properties.
- Three **data rows** to display queried data in the section. You can add or remove data rows as needed.
- A **total row** to display the totaled data for the section. If you do not want a total row for this section (including the root section), you can hide it by disabling **Show Section Total Row** when configuring the section properties.

Once you have added sections, you can make further section changes as follows:

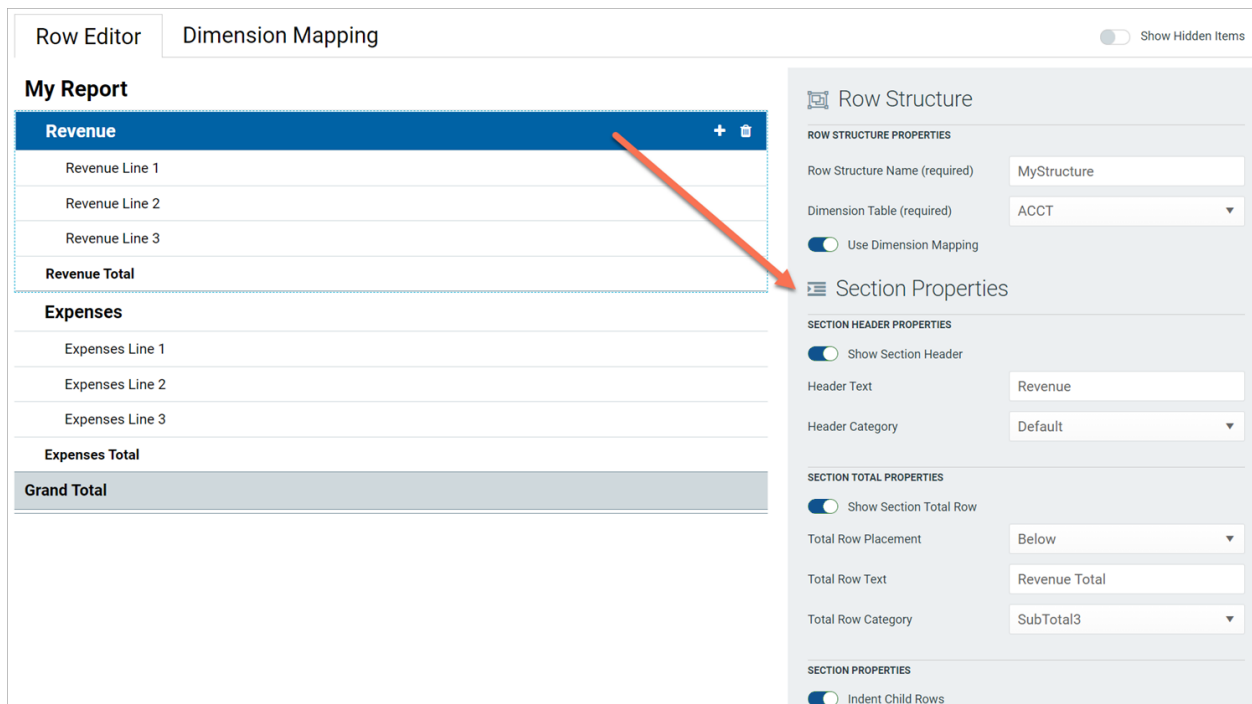
- **To reorder sections:** Select the header row of a section and then drag and drop it to a new location within the same level of the structure. For example, if you have three sections at the same level, you can drag and drop these three sections to change their order. But you cannot drag and drop one of these three sections to a lower level or a higher level.

- **To delete a section:** Select the header row of the section and then click the delete icon (trash can). The section and all of its subsections are deleted. Note that the root section is required and cannot be deleted.

IMPORTANT: Make sure you no longer need the section before clicking the delete icon. The section will be deleted immediately with no confirmation prompt. If you deleted a section by accident, then you can exit the row structure editor without saving, but you will also lose any other unsaved changes that you have made during the current session.

► Section properties

To configure the properties for a section, select the section header and then complete the **Section Properties** in the right-hand pane.



The screenshot displays the 'Row Editor' interface with two tabs: 'Row Editor' and 'Dimension Mapping'. The 'Row Editor' tab is active, showing a table titled 'My Report'. The table has a blue header row 'Revenue' and several data rows: 'Revenue Line 1', 'Revenue Line 2', 'Revenue Line 3', 'Revenue Total', 'Expenses Line 1', 'Expenses Line 2', 'Expenses Line 3', 'Expenses Total', and 'Grand Total'. An orange arrow points from the 'Revenue' header row to the 'Section Properties' pane on the right.

The 'Section Properties' pane is located on the right side of the interface and contains the following sections:

- Row Structure**
 - Row Structure Name (required): MyStructure
 - Dimension Table (required): ACCT
 - Use Dimension Mapping: ☒
- Section Properties**
 - Section Header Properties
 - Show Section Header: ☒
 - Header Text: Revenue
 - Header Category: Default
 - Section Total Properties
 - Show Section Total Row: ☒
 - Total Row Placement: Below
 - Total Row Text: Revenue Total
 - Total Row Category: SubTotal3
 - Section Properties
 - Indent Child Rows: ☒

Example Section Properties area

Section Header Properties

Item	Description
Show Section Header	<p>Specifies whether the section header row is visible when the row structure is used in a report. By default, this option is enabled, so the section header row is visible. If you do not want this section to have a header row, disable this option. The toggle switch shows as green when enabled and as gray when disabled.</p> <p>If this option is disabled, then the remaining section header properties become hidden because they do not apply. Note that you may want to define header text before disabling the option, to make it easier to identify the section when working within the row structure editor.</p> <p>NOTE: If you hide the section header, then you will no longer be able to select the header row in the editor for purposes of adding rows or subsections, configuring the section, reordering the section, or removing the section. If you need to work with the section header row, you can enable the option Show Hidden Items, located at the top right of the editor. This will cause all hidden items to show in the row structure, so that they can be selected and configured.</p>
Header Text	<p>The text to display on the section header row. By default, this is set to "Root Section" for the root section header and "Section" for all other newly added sections. The header text should be edited to reflect the data shown in this section.</p>
Header Category	<p>The style to use on the section header row. The style determines display attributes such as font size and font weight. Select one of the following:</p> <ul style="list-style-type: none">• Header1 through Header6: These styles apply specific formatting to the header row. Although Header1 is designed to be used as the top-level section header, followed by Header2, and so on, you can assign these styles to any section header row as needed.• Default: Axiom Strategy Management automatically applies the appropriate header style depending on the section's placement in the row structure hierarchy. The header row for the root section uses Header1, sections in the next level use Header2, and so on. <p>By default, the header category is set to Header1 for the root section header, and Default for all newly added sections.</p>

Section Total Properties

Item	Description
Show Section Total Row	<p>Specifies whether the section total row is visible when the row structure is used in a report. By default, this option is enabled, so the section total row is visible. If you do not want this section to have a total row, disable this option. The toggle switch shows as green when enabled and as gray when disabled.</p> <p>If this option is disabled, then the remaining section total properties become hidden because they do not apply.</p>
Total Row Placement	The location of the total row in the section, either Below the data rows or Above the data rows. The total row is located below the data rows by default.
Total Row Text	The text to display on the section total row. By default, this is set to "Grand Total" for the root section total and "Section Total" for all other newly added sections.
Total Row Category	<p>The style to use on the section total row. The style determines display attributes such as font size, font weight, shading, and borders. Select one of the following:</p> <ul style="list-style-type: none">• Grand Total or Total: These styles are intended to be used for "final" total rows. Both styles use shading and top and bottom borders. The bottom border of the Grand Total is a double border.• SubTotal1 through SubTotal4: These styles are intended to be used for subtotal rows. These options provide varying combinations of bold and regular text, shading or no shading, and border or no border. <p>By default, the total row category is set to Grand Total for the root section total row, and Subtotal3 for all newly added sections.</p>

Section Properties

Item	Description
Indent Child Rows	Specifies whether the rows in this section are aligned with the section header row or indented. By default, this is enabled, so the rows are indented. If instead you want the rows to be aligned with the section header row, disable this option. The toggle switch shows as green when enabled and as gray when disabled.

Item	Description
Parent Total Row Behavior	<p>Specifies how the data in this section is treated when computing the total row of the parent section. Select one of the following:</p> <ul style="list-style-type: none"> • Add: The data in this section is added when computing the parent total. This is the default behavior. • Subtract: The data in this section is subtracted when computing the parent total. • Ignored: The data in this section is ignored when computing the parent total. You might do this if the rows in this section contain supporting detail that should not impact the overall totals. <p>Although this option displays on the root section, it does not apply because the root section does not have a parent section.</p> <p>For example, imagine that you have a parent section with two subsections. Subsection A totals 5000, and Subsection B totals 1000.</p> <ul style="list-style-type: none"> • If both subsections are set to add, then the total of the parent section is 6000. • If Subsection A is set to add but Subsection B is set to subtract, then the total of the parent section is 4000. • If Subsection A is set to add but Subsection B is set to ignore, then the total of the parent section is 5000.
Section Data Filter	<p>Optional. A data filter to apply to all of the data rows in this section, including any subsections. This is intended to be used when all rows in the section need to be filtered by a particular dimension or grouping, so that you do not need to repeat that dimension grouping on each individual data row. Only applies when Use Dimension Mapping is disabled.</p> <p>Enter the filter criteria statement to apply to the data rows in this section. Section data filters use normal filter syntax for Axiom Strategy Management. Although you can use the Filter Wizard to create the filter criteria statement, it is limited to creating filters based on the specified dimension table for the row structure. In many cases the section data filter needs to use a different dimension, so you must manually create the filter criteria statement.</p> <p>For example, imagine that you want to show revenue accounts in the rows of your report, but you want to split the data into two sections reflecting two different sales regions. You can create two sections and define section filters for each, such as <code>Dept.Region='East '</code> and <code>Dept.Region='West '</code>. All of the data rows in those sections will be filtered by the specified region in addition to the specific account filters listed on each row.</p>

► Adding, removing, and reordering data rows

Using the **Row Editor** area, you can add data rows to a section, remove unneeded rows, and reorder rows. Each data row represents a record of data that you want to query from the database and display within the report.

To add new data rows to a section:

- Select the section header row, then click the plus sign and select **Add Data Row**.

The screenshot shows the 'Row Editor' interface for 'My Report'. It features a table with a blue header row labeled 'Revenue' and three data rows labeled 'Revenue Line 1', 'Revenue Line 2', and 'Revenue Line 3'. A 'Revenue Total' row is at the bottom. A context menu is open over the 'Revenue' header row, showing a minus icon, 'Add Data Row', and 'Add New Section' (with a plus icon).

Revenue
Revenue Line 1
Revenue Line 2
Revenue Line 3
Revenue Total

Option to add a new data row

The new row is added to the bottom of the section. You can continue to add as many new rows to the section as needed.

The screenshot shows the 'Row Editor' interface for 'My Report' after adding a new row. The table now has a blue header row labeled 'Revenue', three data rows labeled 'Revenue Line 1', 'Revenue Line 2', and 'Revenue Line 3', a new blue data row labeled 'New Data Row', and a 'Revenue Total' row at the bottom.

Revenue
Revenue Line 1
Revenue Line 2
Revenue Line 3
New Data Row
Revenue Total

Section with a newly added data row

Once you have added data rows, you can make further row changes as follows:

- **To reorder rows:** Select the data row that you want to move, and then drag and drop it to a new location within the same section. For example, if you want a newly added row to be at the top of the section instead of the bottom, then you can drag and drop it to that location. But you cannot drag and drop the row to a different section, not even to subsections of the current section.
- **To delete a row:** Select the data row that you want to delete and then click the delete icon (trash can). The row is deleted.

IMPORTANT: Make sure you no longer need the row before clicking the delete icon. The row will be deleted immediately with no confirmation prompt. If you deleted a row by accident, then you can exit the row structure editor without saving, but you will also lose any other unsaved changes that you have made during the current session.

Only data rows can be individually added, deleted, and reordered. Section header rows and section total rows are not considered to be data rows and are managed as part of the section. Note the following:

- The delete icon on section header rows does not delete the header row; it deletes the entire section. If you do not want a particular section to have a header row, you can configure the section to hide the header row.
- Section total rows do not have delete icons. If you do not want a particular section to have a total row, you can configure the section to hide the total row.
- Section header rows are always located at the top of the section. When you drag and drop a section header row you are moving the entire section, not just the header row. It is not possible to move just the header row.
- Section total rows can be located at either the top or bottom of the section, but not by dragging and dropping. When you configure the section, you can specify the location of the total row.

► Row properties

To configure the properties for a data row, select the row and then complete the **Row Properties** in the right-hand pane.

The screenshot displays the 'Row Editor' interface. On the left, under 'My Report', there are two sections: 'Revenue' and 'Expenses'. The 'Revenue' section contains 'Revenue Line 1', 'Revenue Line 2', 'Revenue Line 3', and 'Revenue Total'. The 'Expenses' section contains 'Expenses Line 1' and 'Expenses Line 2'. 'Revenue Line 1' is selected, and a red arrow points from it to the 'Data Row Properties' section on the right. The right-hand pane is titled 'Row Structure' and contains 'ROW STRUCTURE PROPERTIES' and 'Data Row Properties'. Under 'ROW STRUCTURE PROPERTIES', there are fields for 'Row Structure Name (required)' (MyStructure), 'Dimension Table (required)' (ACCT), and a toggle for 'Use Dimension Mapping' (checked). Under 'Data Row Properties', there is a 'Row Text' field containing 'Revenue Line 1'. A 'Show Hidden Items' toggle is visible at the top right of the interface.

Example Row Properties area

Item	Description
Row Text	<p>The text to display on the data row. By default, this is set to "New Data Row". The row text should be edited to reflect the data shown on this row.</p> <p>For example, if this row is going to display data for the Travel account, the row text should be something like "Travel" or "Account 5000 - Travel".</p>
Data Filter	<p>A filter criteria statement to define the data to query into this row. Only applies when Use Dimension Mapping is disabled. If dimension mapping is enabled, then use the Dimension Mapping tab to map the data for this row.</p> <p>Row filters use normal filter syntax for Axiom Strategy Management. You can type the filter, or you can use the Filter Wizard to create a filter based on the specified Dimension Table for the row structure.</p> <p>For example, if the data filter is <code>Acct.Category='Revenue'</code>, then this row will display data for all revenue accounts when this row structure is used in a report. The specific data returned will depend on the data columns used in the report, and any other filters applied to the report.</p> <p>Each row's data filter is independent from any other row, and does not need to use the same grouping level or even the same dimension as other rows. For example, one row can be <code>Acct.Acct=4000</code>, while another row is <code>Acct.Category='Marketing'</code>, and a third row is <code>Fcst.Acct=670</code>. However, keep in mind the following:</p> <ul style="list-style-type: none"> • If you use the Filter Wizard to make the filter, it is limited to the table selected as the Dimension Table for the row structure. If you want to use a different table for a particular row, you must manually write the filter. • Although there are no restrictions on the individual row filters, all of the filters used must be compatible with the eventual primary table selected for the report, when the fixed row structure is used in a report.

If the row uses a data filter, then the row's data filter will be combined with any upstream section data filters (using AND). For example, imagine the row structure has sections and rows configured as follows:

Parent Section Filter	<code>Dept.Company='Company A'</code>
Current Section Filter	<code>Dept.Region='US West'</code>
Row Filter	<code>Acct.Acct=4000</code>

Then the data for this row is determined as follows:

```
Dept.Company='Company A' AND Dept.Region='US West' AND Acct.Acct=4000
```

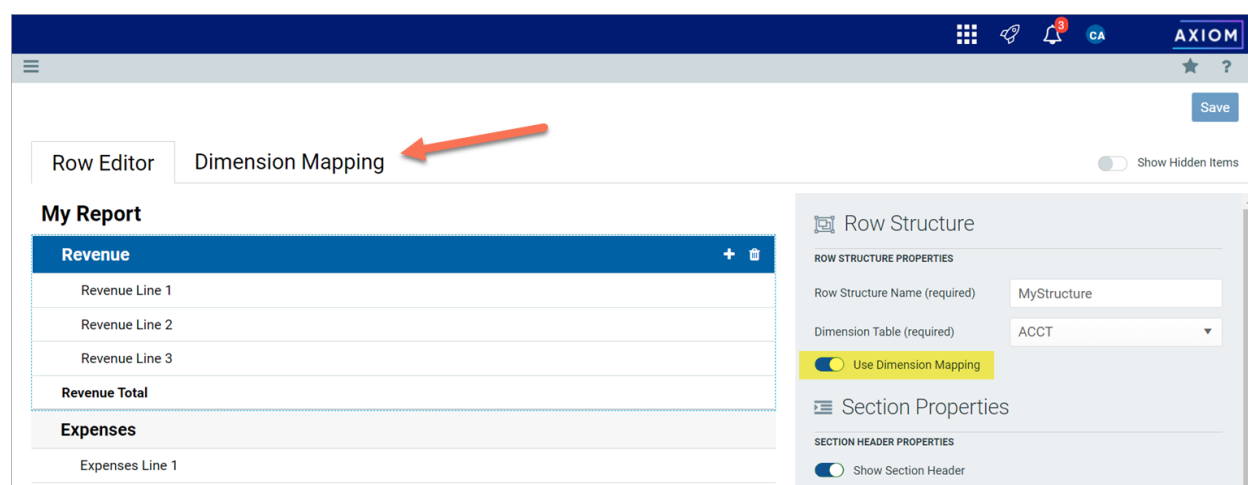
Using the Dimension Mapping editor

Using the Dimension Mapping editor, you can assign dimension items to specific rows of a fixed row structure. When the row structure is used in a web report, the rows will display data for the assigned dimension items.

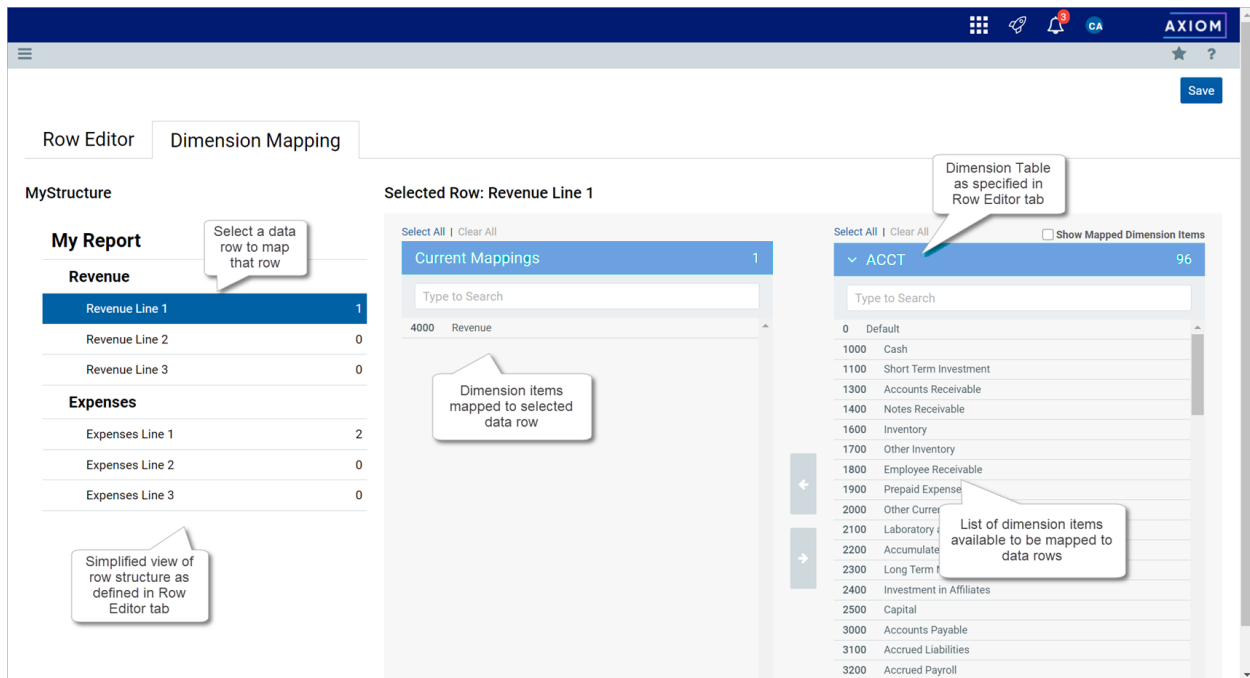
For example, if the row dimension is Acct, you can assign one or more accounts to each row in the row structure. If a row is assigned Acct 4000, then that row will display data for Acct 4000, for each of the columns used in the report.

► Dimension Mapping editor overview

The Dimension Mapping editor is only accessible when [creating or editing a row structure](#). If **Use Dimension Mapping** is enabled for the row structure, then a **Dimension Mapping** tab displays next to the **Row Editor** tab. You can click this tab to open the Dimension Mapping editor and assign dimension items to each row.



Dimension Mapping tab available in row structure when Use Dimension Mapping is enabled



Example Dimension Mapping editor

- The left side of the Dimension Mapping editor displays a simplified view of the row structure defined on the **Row Editor** tab. You can select a data row in the row structure in order to map dimension items to that row.
 - Each data row must be assigned at least one dimension item when using dimension mapping. It is not possible to mix use of data filters and dimension mappings.
 - The number to the left of the row label shows how many dimension items have been assigned to that row.
- The two columns on the right side of the Dimension Mapping editor are used to map dimension items.
 - The **Current Mappings** column in the middle of the page shows the dimension items mapped to the currently selected data row.
 - The dimension column on the right side of the page shows the remaining unmapped dimension items. The dimension used for the mappings is determined by the specified **Dimension Table** in the **Row Editor** tab. In this example, the dimension table is **Acct** and the column shows the list of accounts defined in that table.
 - You can use the arrow buttons between the columns to move dimension items from the dimension column to the Current Mappings column and vice versa.

Each dimension item can only be assigned to a single row in the row structure. Once a dimension item is moved to the Current Mappings column, it is removed from the list of unmapped dimension items and cannot be assigned to another row.

► Assigning dimension items to data rows

Each data row in the row structure must be assigned at least one dimension item. When the row structure is used in a report, the dimension mappings determine what data displays in each row.

To assign one or more dimension items to a data row:

1. In the row structure on the left side of the page, select the data row that you want to map. If any dimension items are already mapped to this row, those dimension items display in the **Current Mappings** column.
2. In the dimension column on the right side of the page, select the dimension item or items that you want to map to the data row.
 - Click a dimension item once to select it. If you select a dimension item by accident, click it again to de-select it.
 - Note that using the Shift key or the CTRL key to select multiple dimension items at once does *not* work here. You must individually click on each dimension item that you want to assign.

You can [search and filter the dimension list](#) to help find the desired dimension items.

3. Once all of the dimension items that you want to assign are highlighted, click the left arrow to move the selected dimension items to the **Current Mappings** column.

If you want to remove a mapped dimension item from a data row, you can select the item in the Current Mappings column and then click the right arrow to move it back to the dimension column.

In the following example, two accounts have been mapped to the Expenses Line 1 data row. When this row structure is used in a report, this row will display summed data for the Software Expense and Computer Expense accounts. (In a real report, the label text for this data row would likely be defined as "Software and Computer Expenses" or something similar.)

The screenshot displays the 'Dimension Mapping' tab in a software application. On the left, under 'MyStructure', there is a 'My Report' section with a table of revenue and expense lines. 'Expenses Line 1' is selected and highlighted in blue. In the center, the 'Selected Row: Expenses Line 1' panel shows 'Current Mappings' with a count of 2. Below this is a search bar and a list of mapped items: '\$200 Software Expense' and '\$400 Computer Expense'. On the right, the dimension list is shown with a search bar and a list of accounts. 'ACCT' is selected, and a count of 96 is shown. Below this is a search bar and a list of accounts including 'Default', 'Cash', 'Short Term Investment', 'Accounts Receivable', 'Notes Receivable', 'Inventory', 'Other Inventory', 'Employee Receivable', 'Prepaid Expenses', 'Other Current Assets', 'Laboratory and Equipment', 'Accumulated Depreciation', 'Long Term Note Receivable', and 'Investment in Affiliates'. Arrows indicate the flow of items between the dimension list and the current mappings.

Revenue	Count
Revenue Line 1	1
Revenue Line 2	0
Revenue Line 3	0

Expenses	Count
Expenses Line 1	2
Expenses Line 2	0
Expenses Line 3	0

Current Mappings	Count
\$200 Software Expense	
\$400 Computer Expense	

Dimension List	Count
ACCT	96
0 Default	
1000 Cash	
1100 Short Term Investment	
1300 Accounts Receivable	
1400 Notes Receivable	
1600 Inventory	
1700 Other Inventory	
1800 Employee Receivable	
1900 Prepaid Expenses	
2000 Other Current Assets	
2100 Laboratory and Equipment	
2200 Accumulated Depreciation	
2300 Long Term Note Receivable	
2400 Investment in Affiliates	

Example data row with mapped dimension items

The two accounts that are mapped to this data row no longer display in the dimension column and cannot be mapped to any other row. You can optionally enable **Show Mapped Dimension Items** to see all items in the dimension column, but mapped items will display as grayed out and cannot be selected.

► Searching and filtering the dimension column

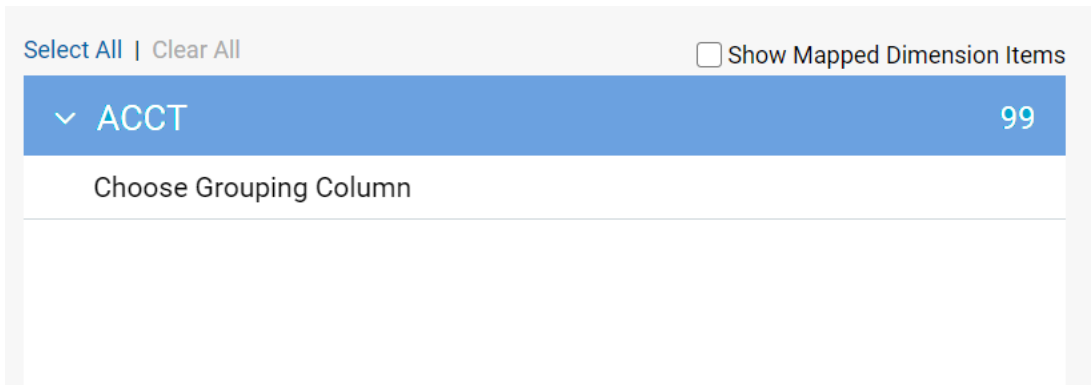
You can search and filter the dimension column to more easily find the dimension items that you want to map.

- You can type into the search box at the top of the column to find items by dimension value. The search matches any dimension value that contains the search text. Currently, the description text is not included in the search.
- You can select a grouping column so that the dimension column is filtered to only show values for a particular grouping. For example, you may have a grouping column of Category, which you can use to show accounts within a particular category—such as Revenue, Capital, or Marketing.

If you use **Select All** when the list is filtered by a search or by a grouping value, then only the currently visible items are selected. This can be a convenient way to find, select, and map multiple dimension items at a time.

To filter the dimension column by a grouping value:

1. Click the down arrow icon in the column header, and then click **Choose Grouping Column**.

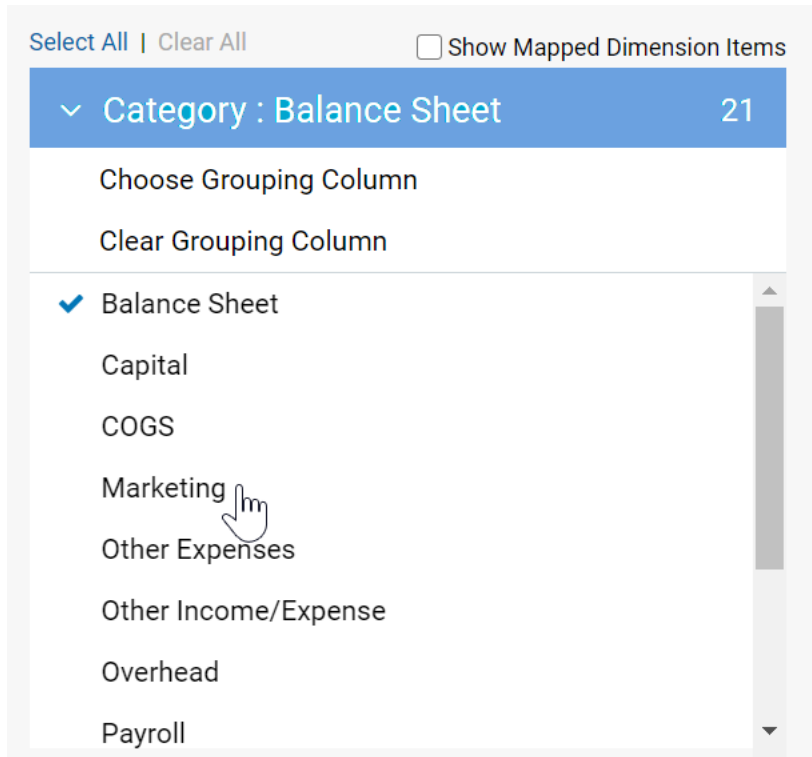


2. In the **Choose a Grouping Column** dialog, select the grouping column that you want to use, and then click **OK**.

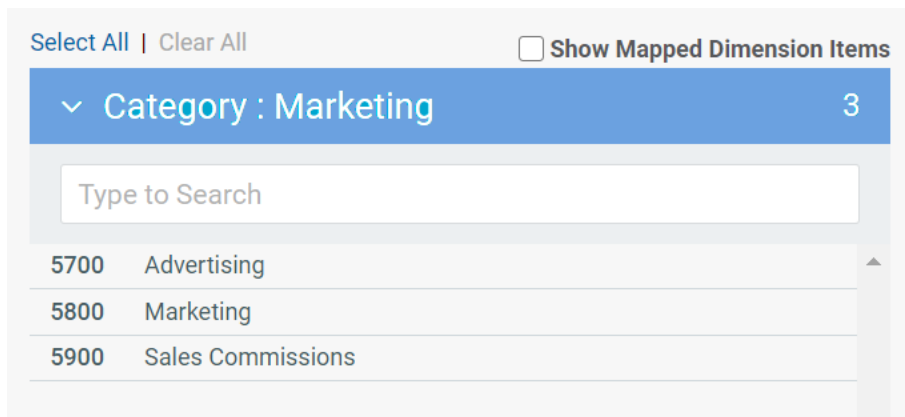
The dimension column becomes filtered by the first value in the selected grouping column. This value displays in the column header.

3. To filter the dimension column by a different value in the grouping column, click the down arrow icon in the column header, and select the desired value.

In the following example, "Balance Sheet" was the automatically-selected value from the grouping column, and we are now going to select "Marketing" instead.



The dimension column is now filtered to only show accounts that belong to the Marketing category.



If you want to clear the grouping column filter, click the down arrow icon in the column header, and select **Clear Grouping Column**.

Opening web reports

In order to open an existing web report, you must have at least read-only access to the report, as defined in Axiom Strategy Management security. Web reports can be opened from either the Web Client or the Desktop Client.


This topic discusses the default ways to access and view web reports. Your system may be designed so that you can open web reports in other ways, such as:

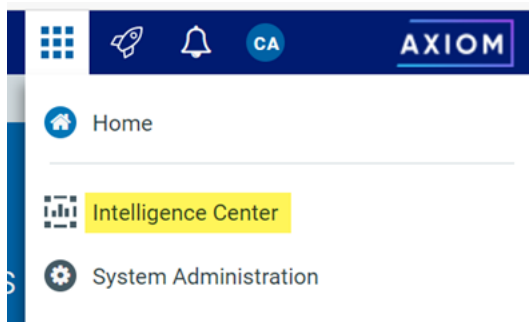
- Using the Navigation panel in the Web Client
- Using links within your home page or product pages
- Using links within a task pane or ribbon tab in the Desktop Client

► Opening web reports from the Intelligence Center

The [Intelligence Center](#) in the Web Client is a hub where you can access all of your available reports, regardless of the report type. The Intelligence Center is automatically filtered to show only the reports that you have access to.

To open a web report from the Intelligence Center:

1. Click the menu icon  in the Global Navigation Bar. From the Area menu, select **Intelligence Center**.



2. In the left-hand panel, select the **Reports** tab if it is not already selected.
3. Do one of the following to locate the report that you want to open:
 - Use the folder tree in the left-hand panel to navigate to the folder where the report is located.
 - OR
 - Use the Search box to search for the report by name.





For more information on how to search, filter, and sort the Intelligence Center, see [Intelligence Center overview](#).

4. Once the report displays in the Intelligence Center grid, click on the report name to open it.

The report opens in the current browser tab. You can now view and explore the data using various features. For more information, see [Viewing and exploring data in web reports](#).

► Opening web reports from the Desktop Client

You can open a web report from the Reports Library in the Desktop Client (Excel Client or Windows Client). You can differentiate web reports from other types of Axiom Strategy Management reports using the following icons:

-  Web report
-  Visualization report
-  Axiom form
-  Spreadsheet Axiom file

To open a web report from the Desktop Client:

1. On the **Axiom** tab, in the **Reports** group, click **Reports** to bring up the Reports menu.

NOTE: In systems with installed products, this feature may be present on a different ribbon tab, such as the **Main** tab.

TIP: You can also open reports from the Explorer task pane or Axiom Explorer.

2. Use the Reports Library folders at the bottom of the menu to navigate to the specific web report that you want to open, and then click on it.

The web report opens in the Web Client using your default browser. You can now view and explore the data using various features. For more information, see [Viewing and exploring data in web reports](#).

Viewing and exploring data in web reports

Once a web report is opened, you may have access to a variety of features to view and explore the data in the report, including filtering, sorting, and drilling.

► Drilling data

If the web report has been configured to enable drilling, you can drill any data row in the report. Total rows, subtotal rows, and section header rows are not drillable.

To drill a data row:

1. Hover your cursor over the far left column in the report so that a magnifying glass icon appears on the row.

The tooltip for the magnifying glass will be either "Drill" (if multiple drill paths are available) or "Drill to <path>" (if a single drill path is available). For example, the tooltip will say "Drill to Acct" if the Acct drill path is the only available drill path.

- Click the icon to drill the row.
 - If multiple drill paths are available, these paths display in a menu when you click the icon. Click the drilling path that you want to view.
 - If a single drill path is available, that path is automatically used when you click the icon to drill.

WorldRegion	Q1 2020	
	Q1 Actuals	Q1 Budget
Asia	\$6,989,316	\$5,416,397
Europe	\$473,158	\$340,531
North America	\$32,766,656	\$35,609,235

Hover and click to drill

The drill results are presented within the current tab, replacing the original report. The current row being drilled and the current drill level display at the top of the drill results.

Intelligence Center

Budget to Actuals | Corporate

Through June 2020

Drill Path ✕

WorldRegion = Europe
By Country

Country = Italy
By Region

Region ↑	Q1 2020		
	Q1 Actuals	Q1 Budget	Difference
Italy Sales Region (Italy)	\$311,465	\$8,964	3,374.62%

Example drill results with drilling path displayed at the top

You can continue drilling the drill results if additional drill paths are available. You can return to a previous path by clicking on that path name in the header. When you are finished viewing the drill results, you can click the **X** icon in the drill path to clear the drill and return to the original report.

► Adjusting column width and order

You can make minor adjustments to the column display as follows:

- To change the column width, hover your cursor along the right edge of the column header, then drag to make the column thinner or wider.
- To reorder columns, click on a column header and then drag it to a new location. Note that columns cannot be moved in or out of a column group (meaning a set of columns grouped under header text). If a column belongs to a column group, you can change its order within the group but you cannot drag it out of the group.

► Sorting data

If the web report uses a data grid with dynamic rows, then you can sort the data by any column in the grid. To sort the grid by a column, click on the column header. Each click toggles between ascending sort, descending sort, and no sort. If the grid is currently sorted by a column, the sort direction is indicated by an arrow on the column header (up for ascending, down for descending).

The web report may only allow sorting by a single column, or it may allow sorting by multiple columns. This is configured by the report designer. If the grid uses single-column sorting, then it is not possible to clear the sort on a column. Instead you must click on a different column to change the sort to use that column.

If the web report uses a fixed row structure, then the row values are fixed in position and cannot be sorted.

► Filtering by column data

If the web report uses a data grid with dynamic rows, you may be able to filter the report by the column data. For example, you might want to filter a column to hide zero-value records, or to show all records above or below a certain value. You might want to filter a dimension column to hide or show certain dimensions (such as departments, accounts, and so on). The report designer determines whether a column is enabled for filtering.

If a column allows filtering, the filter icon displays in the column header when you hover your cursor over the column header.

Jan
\$5,050
\$43,558

Filter icon for a column with filtering enabled

To filter the report based on a column:

1. Click the filter icon in the column header to show the filter options.
2. Set the filter options as desired. You can set up to two filter options, combined with either AND or OR.

Jan	Feb
\$5,050	
\$43,558	
\$103,740	
\$59,050	
\$136,100	
\$9,749,100	

Example filtering options

3. Click **Filter**.

The report updates to only show records that meet the filter. Additionally, the filter icon in the column header remains visible to indicate that the grid is filtered by this column.

The filter is retained until you clear it, or until the report is refreshed with new data.

To clear a filter:

1. Click the filter icon in the column header to show the filter options.
2. Click **Clear**.

The grid updates to clear the filter. The filter icon is now only visible when hovering over the column header.

▶ Viewing paged data

If the web report uses dynamic rows, the data is paged to show a specified number of records per page. If the data in the grid exceeds the page limit, you can move between pages using the page controls at the bottom left of the grid.

	\$24,470,195.79	\$17,723,313.38	\$24,470,195.79	
◀ ◀ 1 2 3 ▶ ▶	25 items per page		1 - 25 of 51 items	

Page controls for data grids

- Click a page number to move directly to that page.
- Click the single arrow buttons to move one page back or forward.
- Click the double arrow buttons to move to the first page or the last page.

By default, the data grid shows 25 records per page. You can use the drop-down list next to the page controls to change this to 50, 100, or 500 as needed.

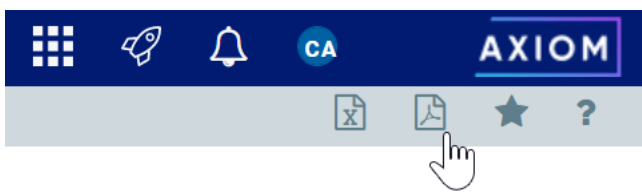
Saving a PDF copy of a web report

You can save a PDF copy of a web report locally, or save it to the Axiom Strategy Management repository.

Any user who can view the report can save a PDF copy to a local folder location. In order to save a PDF copy to the Axiom Strategy Management repository, you must have read/write access to at least one folder in the Reports Library.

To save a PDF copy of a web report:

1. In the [Intelligence Center](#), locate the report in the folder tree and click on the report name to open it.
2. Click the PDF button located in the top right of the gray task bar.




3. In the **Export to PDF** dialog, enter a file name into the **File name** field. By default, the file name is the same as the web report file name.
4. Select the export destination from the **Export to** drop-down:
 - **My computer**: Save the PDF to your computer.

- **Axiom repository:** Save the PDF to a folder in the Axiom Strategy Management Reports Library, or to your My Documents folder.

NOTES:

- If you save the PDF to a folder in the Reports Library, any user with at least read-only access to that folder will be able to view the PDF. You should be sure that it is acceptable for users with permission to the target folder to view the data in the PDF.
- If you do not have read/write access to any folders in the Axiom repository, then the **Export to** option is not available and does not display in the dialog. The PDF will be automatically saved to your computer.

5. If you are saving to the Axiom repository, select an **Output folder**:

- Click the folder icon  to the right of the field.
- In the **Choose output folder** dialog, select a folder in the Reports Library. The dialog only shows folders where you have read/write access to that folder or a child folder.

NOTE: If you have access to the My Documents folder, then you can also save reports to that location for your personal use.

- Click **OK** to choose the folder and return to the **Export to PDF** dialog.

The path to your selected folder now displays in the **Output folder** field.

6. In the **Configuration Settings** section, select the following:

- **Layout:** Select the page size for the PDF. You can choose from the following standard page sizes: **A3**, **A4**, **A5**, **Legal**, **Letter**, or **Tabloid**. Letter is the default size.
- **Orientation:** Select the orientation for the PDF, either **Portrait** or **Landscape**. Portrait is the default orientation.

7. Click **Export** to create the PDF.

- If you are saving to the Axiom repository, and you used a file name that already exists in the target folder, you are prompted to choose whether or not to overwrite the existing file. If you choose not to overwrite, you are returned to the Export to PDF dialog so that you can use a different name and/or output folder.
- If you are saving to your computer, the exact behavior is determined by your browser settings. The default behavior for most browsers is to save the file to the **Downloads** folder on your computer.
- In either case, a notification message displays at the top of the page to indicate whether the PDF creation succeeded or failed.

► Export behavior

When you create the PDF, the web report contents are handled as follows:

- If the grid in the web report has paged data, the grid is expanded so that all rows display in the PDF. Column headers do not repeat on multiple pages.
- If you have sorted, filtered, or drilled the data displayed in the report, these changes are reflected in the PDF. The exception is if you have reordered columns—columns display in their original order.

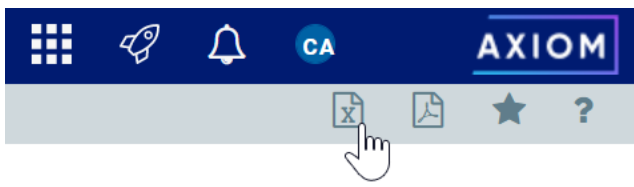
Exporting grid data in a web report to Excel

You can export grid data in a web report to a spreadsheet, so that you can further examine the data using spreadsheet features. You can save the spreadsheet locally, or save it to the Axiom Strategy Management repository.

Any user who can view the report can save the spreadsheet export locally. In order to save the spreadsheet export to the Axiom Strategy Management repository, you must have read/write access to at least one folder in the Reports Library.

To export grid data to an Excel spreadsheet:

1. In the [Intelligence Center](#), locate the report in the folder tree and click on the report name to open it.
2. Click the Excel icon located in the top right of the gray task bar.




3. In the **Export to Excel** dialog, enter a file name into the **File name** field. By default, the file name is the same as the web report file name.
4. Select the export destination from the **Export to** drop-down:
 - **My computer**: Save the spreadsheet to your computer.
 - **Axiom repository**: Save the spreadsheet to a folder in the Axiom Strategy Management Reports Library, or to your My Documents folder.

NOTES:

- If you save the spreadsheet to a folder in the Reports Library, then any user with at least read-only access to that folder will be able to view the spreadsheet. You should be sure that it is acceptable for users with permission to the target folder to view the data in the spreadsheet.
- If you do not have read/write access to any folders in the Axiom repository, then the **Export to** option is not available and does not display in the dialog. The spreadsheet will be automatically saved to your computer.

5. If you are saving to the Axiom repository, select an **Output folder**:

- Click the folder icon  to the right of the field.
- In the **Choose output folder** dialog, select a folder in the Reports Library. The dialog only shows folders where you have read/write access to that folder or a child folder.

NOTE: If you have access to the My Documents folder, then you can also save reports to that location for your personal use.

- Click **OK** to choose the folder and return to the **Export to Excel** dialog.

The path to your selected folder now displays in the **Output folder** field.

6. Click **Export** to create the spreadsheet.

- If you are saving to the Axiom repository, and you used a file name that already exists in the target folder, you are prompted to choose whether or not to overwrite the existing file. If you choose not to overwrite, you are returned to the Export to Excel dialog so that you can use a different name and/or output folder.
- If you are saving to your computer, the exact behavior is determined by your browser settings. The default behavior for most browsers is to save the file to the **Downloads** folder on your computer.
- In either case, a notification message displays at the top of the page to indicate whether the spreadsheet creation succeeded or failed.

► Export behavior

When the grid data is exported, the behavior is as follows:

- The full data contents of the grid are exported (all rows).
- By default, the basic number format applied to the column is preserved in the export. The exception is negative numbers, which will always be shown using a minus sign regardless of the configured format. Other formats such as background colors and borders are not applied to the exported data.

- User changes to the grid—such as changing the sort order, filtering a column, or drilling—are preserved. The exception is reordered columns—columns are exported in their original order.
- Column group headers are omitted from the export. Additionally, if a column has a 2-row header, only the first row of that header is exported.

Production reporting for web reports

Using production reporting features with web reports, you can generate and deliver report "snapshots" to various audiences as needed.

- You can perform multipass processing on a web report over a specified dimension, such as by department, region, or entity. The report is iteratively refreshed—one "pass" for each value of the dimension—and during each pass a filter is automatically applied to limit the data to the current dimension value.
- The output of each pass is a filtered PDF or Excel "snapshot" of the report. This static snapshot is then saved to a target folder location—either a local folder in your network or the Axiom repository—and/or emailed to a specified recipient. Folder locations and email recipients can be determined dynamically so that the location and recipient changes as needed for each pass.
- Multiple PDF or Excel snapshots can be optionally collected into larger "report books" and then dynamically saved and/or emailed as needed. For example, you might process three different web reports by entity, and then collect the three resulting entity snapshots into a single file per entity.

To perform multipass processing on a web report, use the Scheduler task **Web Report Processing**. This task will process a target report by a specified dimension, and then save and/or email the output files as configured in the task.

To collect output files into report books, use the File Collect option of File Processing. To do this, you must create a spreadsheet report, enable it for file processing, and then configure file collect options. Once it is configured, file collect processing can be run manually in the Desktop Client, or can be run using the Scheduler task **File Processing**.

IMPORTANT: In phase one of production reporting for web reports, processing is only supported for web reports created from product-delivered templates. Ad hoc web reports created in the Report Builder cannot be processed yet. Support for ad hoc report processing is planned for an upcoming phase two.

Setting up web report processing

You can perform production reporting for web reports using multipass processing. The report can be processed multiple times over a dimension, generating a filtered PDF or Excel copy of the report for each value of the dimension. The report copies can be saved to a designated location and/or emailed to designated recipients.

To perform multipass processing on a web report, use the Scheduler task **Web Report Processing**. When you set up this task, you configure the following:

- The web report to process. You can process any web report created from a product-delivered template.
- The output format of the processing. Each pass will generate a filtered PDF or Excel output file. The name of the file can be set dynamically using processing variables and job variables.
- The delivery option for the processing. Each output file can be saved to a folder location, emailed to a recipient, or both.
 - If the output is saved, you specify the location of the target folder (local or Axiom repository) and the folder path. The folder path can be set dynamically using processing variables and job variables.
 - If the output is emailed, you specify the recipients of the email, and the email subject and body text. The recipients can be manually entered into the task settings (and can optionally use job variables), or you can specify a table column to dynamically look up the recipients. Recipients can be email addresses, or you can list user and role names to look up email addresses from Axiom security. The email subject and body text can be set dynamically using processing variables and job variables.
- The dimension to process. You can specify any dimension that will be compatible against the data queried in the target web report. The web report will be processed once for each value in the dimension. If desired, you can define a filter to limit the dimension values to process.

► Configuring a web report processing task

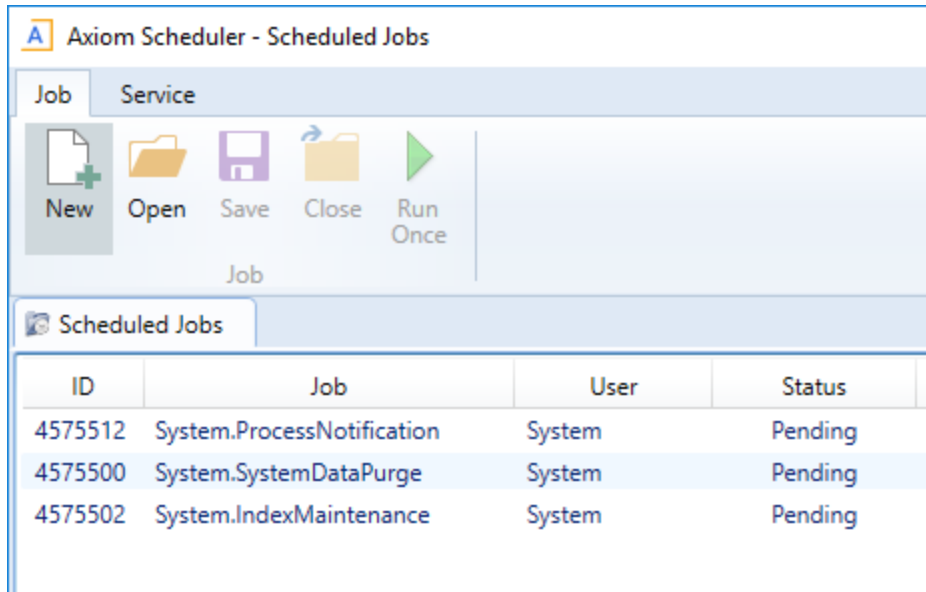
In order to create a Scheduler job with a Web Report Processing task, you must be an administrator or a user with the **Scheduled Jobs User** permission. You must also have read/write access to at least one folder in the Scheduler Jobs Library to save the job. Scheduler jobs can only be created in the Desktop Client.

To create a Scheduler job with a web report processing task:

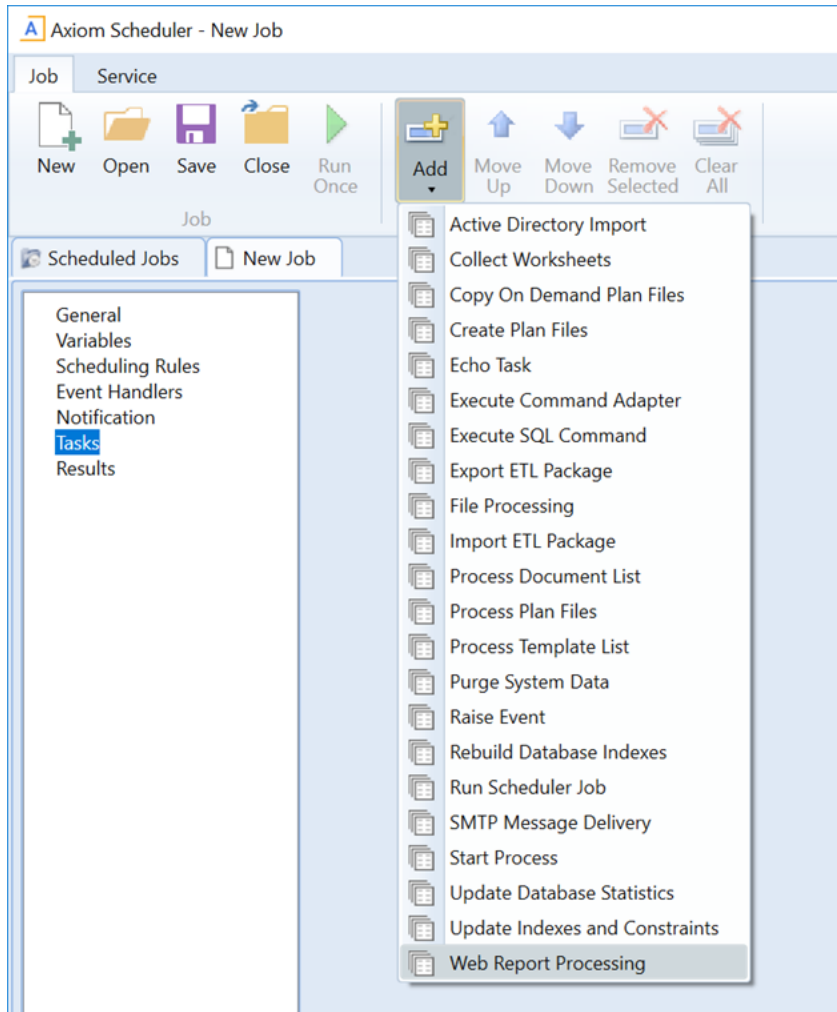
1. On the **Axiom** tab, in the **Administration** group, click **Manage > Scheduler**.

NOTE: In systems with installed products, this feature may be located on the **Admin** tab. In the **System Management** group, click **Scheduler**.

2. In the **Scheduler** dialog, on the **Job** tab, click **New**.



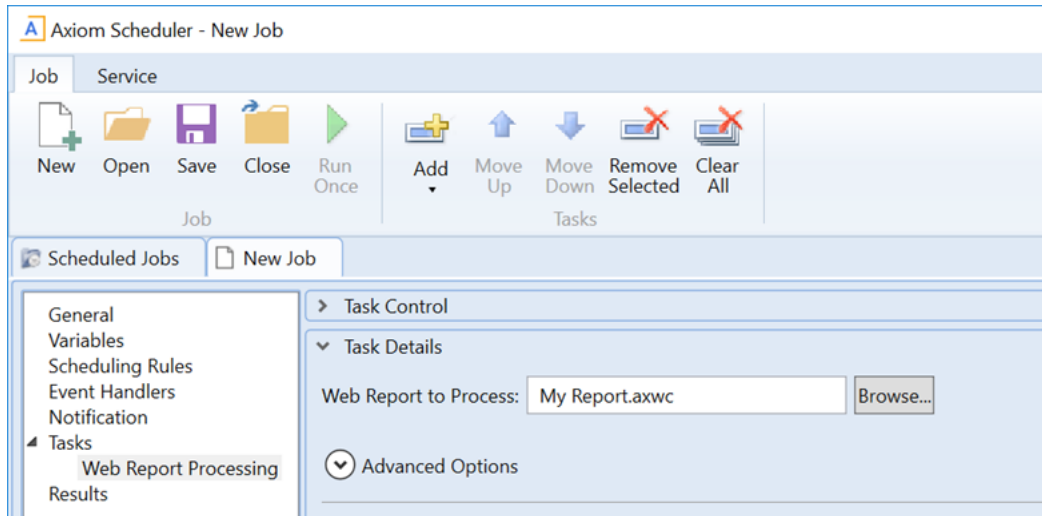
3. Select the Tasks section of the job, then on the Job tab, click Add > Web Report Processing.



4. Select the **Web Report to Process**. This is the report that will be processed by the task.
 - Click the **Browse** button to open the Axiom Explorer dialog.
 - Navigate to the web report that you want to process, then select the report and then click **Open**.

The selected report is listed in the Web Report to Process box.


IMPORTANT: Remember, only web reports that are created from a product-delivered template can be processed. The Axiom Explorer dialog is filtered to only show reports that were created from template.




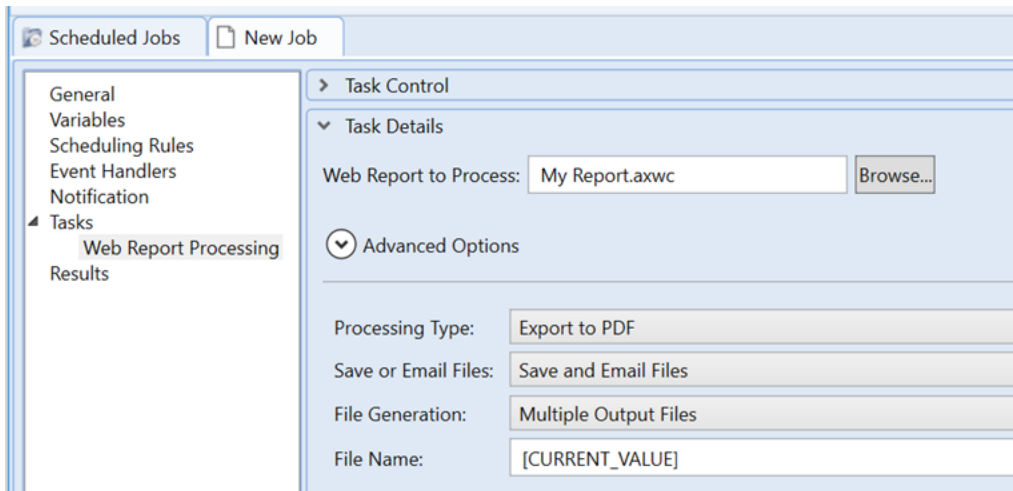
Example task with report selected for processing

5. Complete the general processing properties that determine the processing type and the output:

Item	Description
Processing Type	<p>Select one of the following to determine the output format of each pass:</p> <ul style="list-style-type: none"> • Export to Excel (default): The contents of the report are exported to a spreadsheet (XLSX) file. The output uses the same behavior as when you export to spreadsheet while viewing the web report. • Export to PDF: The report is saved as a PDF file. The output uses the same behavior as when you save to PDF while viewing the web report.
Save or Email Files	<p>Select one of the following to determine the delivery method for the output:</p> <ul style="list-style-type: none"> • Save Files (default): The output files are saved to the specified output folder. • Email Files: The output files are emailed to the specified recipients. The output files are not saved anywhere on the file system. • Save and Email Files: The output files are both saved and emailed.

Item	Description
File Generation	<p>Select one of the following to determine whether the output is saved as a single file or multiple files:</p> <ul style="list-style-type: none"> • Multiple Output files (default): The results of each pass are saved as individual output files. For example, if the multipass settings result in 10 passes, then 10 output files are created (one file for each pass). • Single Output File: The results of each pass are collected into a single output file. For example, if the multipass settings result in 10 passes, then the results of all 10 passes are placed in a single output file. <p>If the output type is Excel, then each pass is a separate sheet in the Excel file. If the output type is PDF, then the PDF for each pass is combined into one large PDF file.</p>
File Name	<p>Specify how the output file (or files) should be named. You can do the following:</p> <ul style="list-style-type: none"> • You can use processing variables and/or Scheduler job variables to generate dynamic file names. • You can type a "hard-coded" file name. <p>If the task will generate multiple output files, then the file name (or the output folder path) must use a processing variable so that the output of each pass is unique. If the task will generate a single output file, then variables are not required.</p> <p>To use a processing variable, you can type the variable or you can click the pencil icon  to open a text editor. From the Insert Variable list, select the variable that you want to use.</p> <p>For example, you could set the file name to <code>Income Statement [Current_Value]</code>. If the report is being processed by region to multiple output files, this will generate file names such as <code>Income Statement West</code>, <code>Income Statement East</code>, and so on (where "East" and "West" are region names).</p> <p>NOTE: Processing variables and Scheduler variables use different syntax. Processing variables are enclosed in square brackets. Scheduler job variables are enclosed in curly brackets.</p>

Item	Description
Sheet Name	<p>Specify how the sheet for each pass should be named. This property only applies when the processing type is Export to Excel. You can do the following:</p> <ul style="list-style-type: none"> You can use processing variables and/or Scheduler job variables to generate dynamic sheet names. You can type a "hard-coded" sheet name. <p>If the task will collect all of the output into a single spreadsheet file, then the sheet name must use a processing variable so that the output of each pass is unique. If the task will generate multiple output files, then variables are not required.</p> <p>To use a processing variable, you can type the variable or you can click the pencil icon  to open a text editor. From the Insert Variable list, select the variable that you want to use.</p> <p>For example, you could set the sheet name to <code>[Current_Value]</code>. If the report is being processed by region, this will generate sheet names such as <code>West</code>, <code>East</code>, and so on (where "East" and "West" are region names).</p> <p>NOTE: Processing variables and Scheduler variables use different syntax. Processing variables are enclosed in square brackets. Scheduler job variables are enclosed in curly brackets.</p>



The screenshot shows the 'Scheduled Jobs' window with the 'New Job' button. The left sidebar lists 'General', 'Variables', 'Scheduling Rules', 'Event Handlers', 'Notification', 'Tasks', 'Web Report Processing', and 'Results'. The 'Task Control' tab is selected, and the 'Task Details' section is expanded. The 'Web Report to Process' field contains 'My Report.axwc' with a 'Browse...' button. The 'Advanced Options' section is expanded, showing the following settings:

- Processing Type: Export to PDF
- Save or Email Files: Save and Email Files
- File Generation: Multiple Output Files
- File Name: [CURRENT_VALUE]

Example task with general processing properties configured

- Depending on the selected processing type (PDF or Excel), complete the properties specific to that processing type:

Export to PDF Settings

Item	Description
PDF Orientation	Select the orientation for the PDF, either Portrait or Landscape . Portrait is the default orientation.
Page Size	Select the page size for the PDF. You can choose from the following standard page sizes: A3 , A4 , A5 , Legal , Letter , or Tabloid . Letter is the default size.

Export to Excel Settings

Item	Description
Include Column Headers	<p>Specifies whether column headers are included in the file output. By default this is set to On, which means column header text is included in the first row of the spreadsheet. Column grouping headers and multi-row headers are not included.</p> <p>If this option is set to Off, then column headers are omitted from the file output and the data starts in the first row of the spreadsheet.</p>
Include total row	<p>Specifies whether the total row is included in the file output. By default this is set to On, which means that the total row is included in the spreadsheet.</p> <p>If this option is set to Off, then the total row is omitted from the file output.</p> <p>NOTE: This option only applies when the web report being processed is a dynamic row report with the total row enabled. If the web report being processed uses a fixed row structure, then the total and subtotal rows defined in the fixed row structure are always included in the spreadsheet.</p>


The screenshot shows the 'New Job' configuration window. On the left is a navigation pane with categories: General, Variables, Scheduling Rules, Event Handlers, Notification, Tasks (expanded), Web Report Processing, and Results. The 'Task Control' tab is selected. It contains two sections: 'Task Details' and 'Advanced Options'. In 'Task Details', 'Web Report to Process' is set to 'My Report.axwc' with a 'Browse...' button. In 'Advanced Options', 'Processing Type' is 'Export to PDF', 'Save or Email Files' is 'Save and Email Files', 'File Generation' is 'Multiple Output Files', and 'File Name' is '[CURRENT_VALUE]'. Below this, 'Export to PDF Settings' shows 'PDF Orientation' as 'Portrait' and 'Page Size' as 'Letter'.

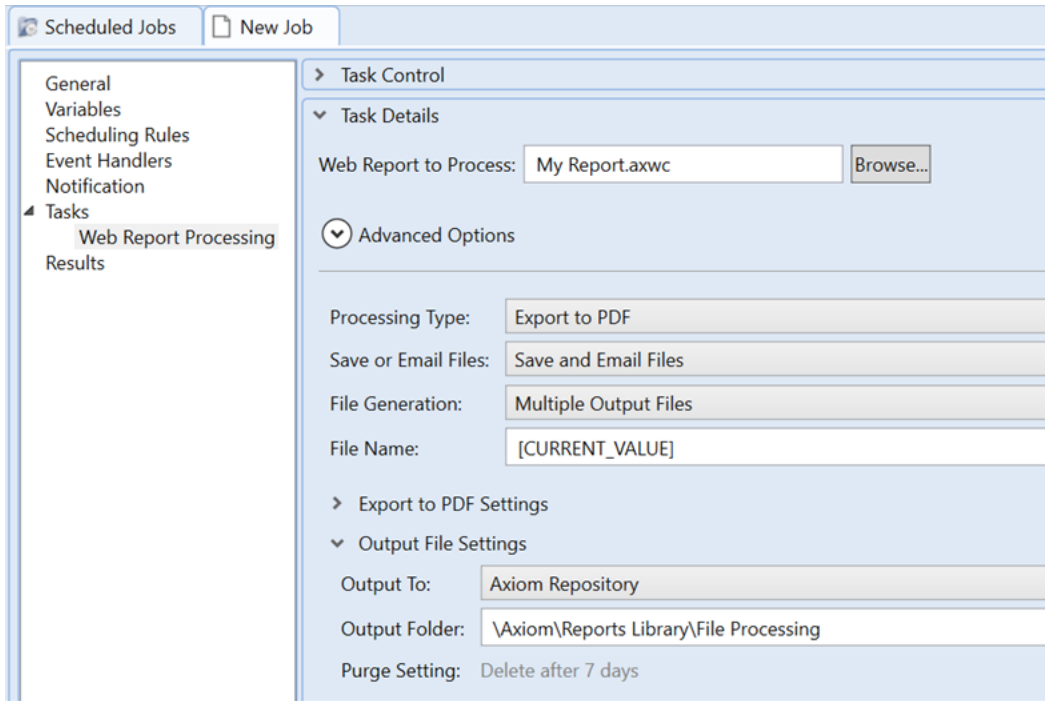
Example task with PDF-specific settings

7. If the processing is set to **Save Files** or **Save and Email Files**, complete the **Output File Settings**:

Item	Description
Output To	<p>Select one of the following:</p> <ul style="list-style-type: none"> • Local File System (default): The output location is outside of Axiom Strategy Management, to a location on your local network share. The specific path is detailed in the Output Folder setting. Access to output files is not controlled by Axiom Strategy Management. • Axiom Repository: The output location is the Axiom Strategy Management file system, within the Reports Library. The specific path is detailed in the Output Folder setting. Access to output files is controlled by security access to the designated folder within Axiom Strategy Management.

Item	Description
Output Folder	<p>Specify the folder location for the file output. You can type a folder path, or you can click the folder icon to browse to the folder location. The browse dialog will display either your local file system or the Axiom file system, depending on what you selected for Output To.</p> <p>The output folder can be made dynamic as follows:</p> <ul style="list-style-type: none"> • If File Generation is set to Multiple Output Files, then processing variables can be used in the output folder path. For example, you can include <code>[Current_Value]</code> in the output folder path, and this will be replaced with the current multipass value. Processing variables are not valid in the output folder path if the task is configured to generate a single output file. • Scheduler job variables can be used in the output folder path. <p>NOTE: Processing variables and Scheduler variables use different syntax. Processing variables are enclosed in square brackets. Scheduler job variables are enclosed in curly brackets.</p> <p>Local file system</p> <p>The output folder location must be entered as a UNC path, and must be accessible by the Scheduler service user account (for on-premise systems) or the Axiom Cloud Integration Service (for cloud systems).</p> <p>The ability to save files to the specified location and access them after saving is controlled by local network security.</p> <p>Axiom repository</p> <p>The specified location in the Axiom file system must be within the Reports Library, and the location must use the full path (meaning: <code>\Axiom\Reports Library\...</code>). The ability to save files to the specified location and to create new folders (if necessary) depends on the Axiom Strategy Management security permissions for the user processing the file. Users can only create new folders if they have read/write permissions to the parent folder, and they can only create new files if they have read/write permissions to the target folder.</p> <p>Once the files are created within the Axiom file system, access to those files is dependent on the user's permissions to the output folder. Typically you should create the output folder in advance (or if you want to create output folders on-the-fly, create a parent folder to hold the output folders), and then set permissions for that folder as appropriate in Axiom Strategy Management security, so that the appropriate users will be able to access the files after they are created.</p>

Item	Description
Remote Data Connection	<p>This option only applies when the file output is being saved to your local file system, and only for Axiom Cloud systems that are using remote data connections.</p> <p>Select the name of the remote data connection to use for the file processing operation. The designated remote data connection will be used to access the local file system and save output file(s) to the designated location.</p> <p>A remote data connection is required to save files locally from an Axiom Cloud system. For more information, see the section on remote data connections in the <i>Scheduler Guide</i>.</p>
Purge Setting	<p>This option only applies when the file output is being saved to the Axiom Repository.</p> <p>If you want the file output to be automatically deleted after a specified period of time, then click the pencil icon  to open the Choose Date dialog.</p> <ul style="list-style-type: none"> • No purge date (default): File output is not automatically deleted. • Static purge date: Select a specific date, after which the output will be deleted. • Relative purge date: Specify a number of days to keep the output after it has been generated. The output will be deleted after the specified number of days have passed.



Scheduled Jobs | New Job

- General
- Variables
- Scheduling Rules
- Event Handlers
- Notification
- Tasks
 - Web Report Processing
 - Results

Task Control

Task Details

Web Report to Process:

Advanced Options

Processing Type:

Save or Email Files:

File Generation:

File Name:

Export to PDF Settings

Output File Settings


Output To:



Output Folder:

Purge Setting:

Example task saving output to the Axiom Repository

- If the processing is set to **Email Files** or **Save and Email Files**, complete the **Email Settings**:

Item	Description
Recipient column	<p>Optional. Specify a table column that holds the desired email recipients for each pass. This option only applies if File Generation is set to Multiple Output Files, so that each pass will be sent a separate email.</p> <p>You can type the name of a table column, or click the column button  to select a column from the multipass table or a lookup table. (You must select a multipass column first before you can use the column button to select a column.) For example, if the multipass column is Dept.VP, the recipient column might be Dept.VP.Email.</p> <p>The specified column can contain any of the following: email addresses, user login names, and/or role names. The column can contain multiple values separated by a semicolon. The recipients listed in the column will be used as the To address for the email (in addition to any recipients listed directly in the To field). If the column contains a user login name, that user's email address as defined in security will be used. If the column contains a role name, the email will be sent to all users in the role.</p> <p>To verify that the recipient column will resolve as you expect for each pass, you can click the Preview Multipass List button in the Multipass Data Settings section. The specified recipient column displays in this preview so that you can see the recipient column values associated with the multipass column values.</p> <p>NOTE: The recipient column must have a one-to-one relationship with the values in the specified multipass column.</p>
To	<p>Specify the To recipient(s) for the email. This is required if a recipient column is not specified. If a recipient column is specified, the recipients listed here will be added to the recipients listed in the column for each pass.</p> <p>You can type one or more email addresses, user login names, and/or role names. Separate multiple recipients with semicolons. If a user login name is listed, that user's email address as defined in security will be used. If a role name is listed, the email will be sent to all users in the role.</p> <p>NOTE: If File Generation is set to Multiple Output Files, the recipients in the To field will receive a separate email for each pass. The only way to dynamically send the emails to different recipients per pass is to use the Recipient Column option.</p>
CC	<p>Optional. Specify the CC recipient(s) for the email. This field follows the same rules as the To field.</p>

Item	Description
BCC	Optional. Specify the BCC recipient(s) for the email. This field follows the same rules as the To field.
From	<p>Select one of the following to specify the From address for the email:</p> <ul style="list-style-type: none"> • Current User: The email will be sent from the user who executes the Scheduler job. • System User: The email will be sent from the designated From user for Scheduler. This is the same value returned by the <code>{Scheduler.FromEmailAddress}</code> job variable.
Subject Line	<p>Enter the subject line for the email. Processing variables can be used in the subject line when File Generation is set to Multiple Output Files.</p> <p>To use a processing variable, you can type the variable or you can click the pencil icon  to open a text editor. From the Insert Variable list, select the variable that you want to use.</p> <p>For example, you could set the subject line to <code>Monthly report for [Current_Value]</code> in order to include the current pass value in the subject line.</p>
Body Text	<p>Enter the body text for the email. Processing variables can be used in the body text when File Generation is set to Multiple Output Files.</p> <p>To use a processing variable, you can type the variable or you can click the pencil icon  to open a text editor. From the Insert Variable list, select the variable that you want to use.</p>

Scheduler job variables can be used in any of the email settings except the From setting.

Scheduled Jobs New Job

- General
- Variables
- Scheduling Rules
- Event Handlers
- Notification
- Tasks
 - Web Report Processing
- Results

Task Control

Task Details

Web Report to Process:

Advanced Options

Processing Type:

Save or Email Files:

File Generation:

File Name:

Export to PDF Settings

Output File Settings

Email Settings

Recipient Column:

To:

Cc:

Bcc:



From:



Subject Line:

Body Text:

Example task looking up email addresses from a recipient column

- Complete the multipass settings for processing:

Item	Description
Multipass Column	<p>Specify the column to use for multipass processing. You can type a Table.Column name, or click the column icon  to select the column from a dialog. You can select any column on a data or reference table, though typically processing is performed by a dimension such as Dept.Dept, or a grouping such as Dept.Region.</p> <p>The report will be processed once for each unique value in the specified column (except for any values excluded by the Source Filter). A filter is applied to the data query in the report so that the data is limited to the current pass value. For example, if you are processing by Dept.Dept, then the report will be processed once for each department, and the report data will be limited to only the data for that department.</p> <p>Keep in mind the difference between processing by a data table column such as GL2021.Dept, versus a dimension table column such as Dept.Dept. When processing by GL2021.Dept, the report will be processed by each department with data in the GL2021 table. When processing by Dept.Dept, the report will be processed by each department in the Dept table.</p> <p>To verify the list of values for processing, click the Preview Multipass List button to view the list of items. The first 100 values are shown, in the order they will be processed. If the task configuration includes a Recipient Column (in the email settings) or a Sort By column, these columns are also shown in the preview.</p>
Current Pass Header	<p>Optional. Define a header to display in the report output file. This option only applies if the processing type is Export to PDF.</p> <p>The current pass header should use processing variables to display information about the current pass. To use a processing variable, you can type the variable or you can click the pencil icon  to open a text editor. From the Insert Variable list, select the variable that you want to use.</p> <p>For example, you can define a header such as:</p> <pre>Processed by [MULTIPASS_COLUMN] [CURRENT_VALUE]</pre> <p>When processing by Dept.Dept, this would resolve such as</p> <p>Processed by Dept 22000</p> <p>By default, if the current pass header is left blank, then the PDF output will not include a header to indicate the current pass information. However, it is possible that the template used to create the report may have been designed with a dynamic header that will display this information.</p>

Item	Description
Sort By	<p>Optional. Specify one or more sort columns for the list of multipass values. You can type a Table.Column name, or click the column icon  to select the column from a dialog. You can also optionally specify <i>Asc</i> or <i>Desc</i> after the column name (ascending order is used if not specified). For example: <code>Dept.Dept Desc</code>. Separate multiple values with semicolons.</p> <p>By default, the values are sorted by the multipass column in ascending order. The Sort By field only needs to be used if you want the values to be sorted in descending order instead, or if you want the values sorted by a different column in the same table.</p> <p>The processing order is only relevant when File Generation is set to Single Output File, since it determines the order of each individual pass within the single file. When outputting to Multiple Output Files, the order is still used during processing but it has no useful impact on the outcome.</p>
Source Filter	<p>Optional. Specify a filter to limit the multipass list of items. You can type a filter, or you can click the filter icon  to use the Filter Wizard.</p> <p>When the multipass list of values is generated, any value that does not meet the source filter will be excluded from processing.</p> <p>By default, all values in the specified multipass column are processed if the source filter is left blank.</p>

Scheduler job variables can be used in any of the multipass settings.

Scheduled Jobs | New Job

General
Variables
Scheduling Rules
Event Handlers
Notification
Tasks
Web Report Processing
Results

Task Control

Task Details

Web Report to Process: My Report.axwc [Browse...]

Advanced Options

Processing Type: Export to PDF

Save or Email Files: Save and Email Files

File Generation: Multiple Output Files

File Name: [CURRENT_VALUE]

Export to PDF Settings

Output File Settings

Email Settings

MultiPass Data Settings

Multipass Column: Dept.VP

Current Pass Header: Processed by [MULTIPASS_COLUMN] [CURRENT_VALUE]

Sort By:

Source Filter:

10. Complete the remaining task and job settings as desired. For more information, see the Scheduler documentation. Note the following:
 - Generally speaking, the **Advanced Options** displayed at the top of the Web Report Processing task should only be modified as advised by Axiom Support.
 - If you want to schedule the job for execution at a later date and/or time, including setting up recurring execution, use the **Scheduling Rules** section of the job.
 - If you want to use Scheduler job variables in any task settings, these variables should be defined in the **Variables** section of the job.
 - It is recommended to review the **Notification** settings for the job and adjust them as needed. By default, Scheduler jobs are configured to send an email to the user who executed the job when the job completes, regardless of the job status.
11. On the **Job** tab, click **Save** to save the job.
12. In the Axiom Explorer dialog, select a folder location in the Scheduler Jobs Library and define a name for the job, then click **Save**.

If the job settings included an active scheduling rule, this rule is evaluated when the job is saved and the next scheduled execution is added to the Scheduler job queue.

► Executing web report processing

Once you have set up a Scheduler job with a Web Report Processing task, you can execute the web report processing by executing the Scheduler job. Scheduler jobs can be executed on demand by using the **Run Once** feature within Scheduler, or you can schedule the job for future execution by defining and saving a scheduling rule in the job. Scheduler jobs can also be executed on demand using RunEvent, such as to kick off the Scheduler job from a custom task pane, Axiom form, or spreadsheet Axiom report.

When web report processing is executed, the following occurs:

- The list of multipass values to process is obtained using the Multipass Column limited by the Source Filter, sorted in the default or specified sort order.
- The specified report is processed once for each value in the multipass list.
 - The report data query is filtered by the current pass value and the report data is refreshed.
 - A PDF or Excel copy of the report is generated, depending on the specified Processing Type.
- If the File Generation is Multiple Output Files, then the output file for each pass is saved and/or emailed according to the task configuration.
- If the File Generation is Single Output File, then the result of each pass is saved in temporary storage and then merged into a single file once all passes are complete. This single file is then saved and/or emailed according to the task configuration.

Each pass of multipass processing can succeed or fail independently without affecting the other passes. For example, imagine the multipass list has 10 items. Pass 1 fails because the specified recipient column does not contain a valid email address, user name, or role for the pass 1 value. This pass-level failure does not stop passes 2-10 from being processed. The job status will report partial success in this case.

A Scheduler job can contain multiple Web Report Processing tasks, followed by a File Processing task to collect the various output files into "report books", and then save and/or deliver the collected books. For more information, see [Setting up file collect with web report processing](#).

► Using processing variables

The following processing variables can be used in various settings within the Web Report Processing task, in order to dynamically change the setting using information for the current pass.

Item	Description
[CURRENT_VALUE]	<p>This variable returns the current multipass processing value. For example, if you are processing by Dept.Dept, and the current pass is for department 20000, the variable will be replaced by the value "20000" for this pass.</p> <p>This variable is typically used in settings such the file name, sheet name (when generating Excel output), and folder path.</p>

Item	Description
[CURRENT_PASSNUMBER]	This variable returns the current pass number. For example, if the current pass is number 20 of 35 passes, the variable will be replaced by the value "20" for this pass.
[MULTIPASS_COLUMN]	<p>This variable returns the name of the multipass column. For example, if you are processing by Dept.Dept, the variable will be replaced by the value "Dept" for all passes.</p> <p>This variable could be used whenever you want to reference the name of the dimension processed. For example, instead of just referencing the current value in the file name, you might want to reference the column name and the value. A variable construction like [MULTIPASS_COLUMN] [CURRENT_VALUE] would resolve to "Dept 20000" when processing by Dept.Dept and the current pass is for department 20000.</p>

Processing variables can only be used in certain settings, and sometimes only when the output is multiple files (versus a single file). See the documentation for each individual setting to see if processing variables are supported in that setting.

NOTE: Processing variables and Scheduler variables use different syntax. Processing variables are enclosed in square brackets. Scheduler job variables are enclosed in curly brackets.

► Using Scheduler job variables in task settings

Scheduler job variables can be used in any Web Report Processing task setting that you can directly type into, such as the file name, sheet name, folder path, and various email settings. To use a Scheduler job variable, you first define the variable on the **Variables** tab of the job, then you enter the variable in the desired setting using curly brackets. For example, if the variable name as defined on the Variables tab is `columnname`, then enter `{columnname}` in the task setting. When the job is executed, the variable in curly brackets will be replaced by the current value of the variable.

Scheduler job variables are useful when you want a task setting to change dynamically based on a variable value that gets passed to the Scheduler job. Various processes in Axiom Strategy Management can trigger a Scheduler job for execution and pass variable values to the job. Additionally, previous tasks in the job can set a variable value that is then passed to subsequent tasks in the job.

NOTE: Processing variables and Scheduler variables use different syntax. Processing variables are enclosed in square brackets. Scheduler job variables are enclosed in curly brackets.

► Using Scheduler job variables to pass refresh variable values

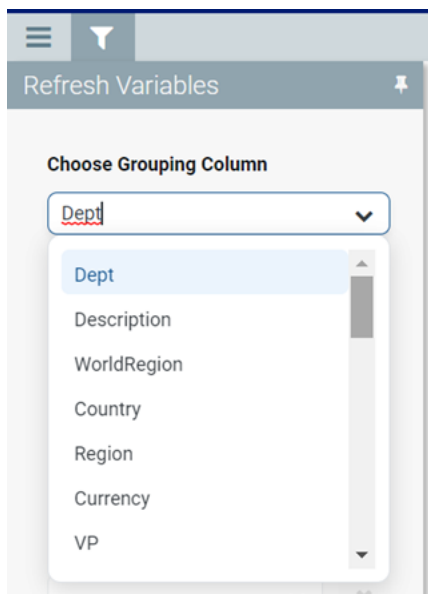
If the web report uses refresh variables, Scheduler job variables can be used to pass variables to these variables. For example, in some cases the report may require certain refresh variables to be set before data can be queried. In this case, the Scheduler job must pass values for these required refresh variables. The refresh variables will be used to refresh data for each pass, in addition to the multipass filter for the current pass.

In order to pass a Scheduler job variable value to the report as a refresh variable value, special syntax is used for the job variable:

```
ReportVariable.VariableID
```

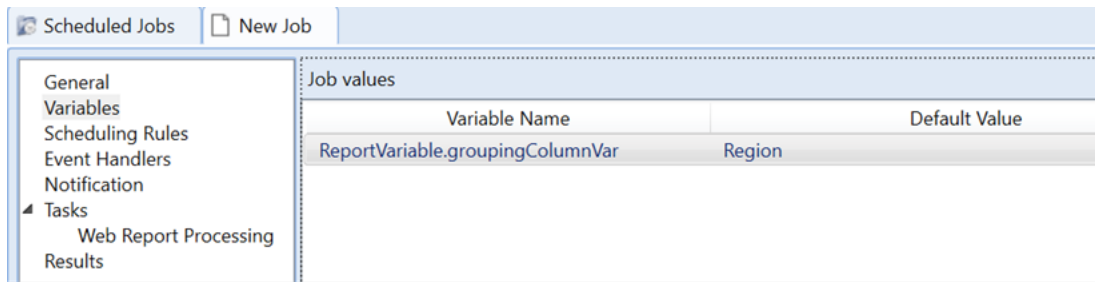
Where `ReportVariable` is a dedicated keyword that tells processing to apply the variable as a report parameter, and `VariableID` is the name of the specific report parameter.

For example, the report may contain a refresh variable that specifies the grouping level (row dimension) of the report. This refresh variable takes values such as `Dept`, `WorldRegion`, `Country`, and so on.



Example refresh variable

In this example, the ID of this refresh variable is `groupingColumnVar`. Therefore to pass a value to this refresh variable, a Scheduler job variable named `ReportVariable.groupingColumnVar` can be used. This variable must be assigned a value that exactly corresponds to a value that can be selected for the refresh variable within the Refresh Variables panel.



When this report is processed, the value for this refresh variable will be set to Region.

NOTES:

- The processing variable `[Current_Value]` can be used as the variable value, if it will resolve to a valid value for the refresh variable. In this case, the value of the variable will change dynamically for each pass.
- Because the variable IDs are not exposed on the report, this feature is primarily useful for product developers to deliver a pre-configured Scheduler job with a product.

Setting up file collect with web report processing

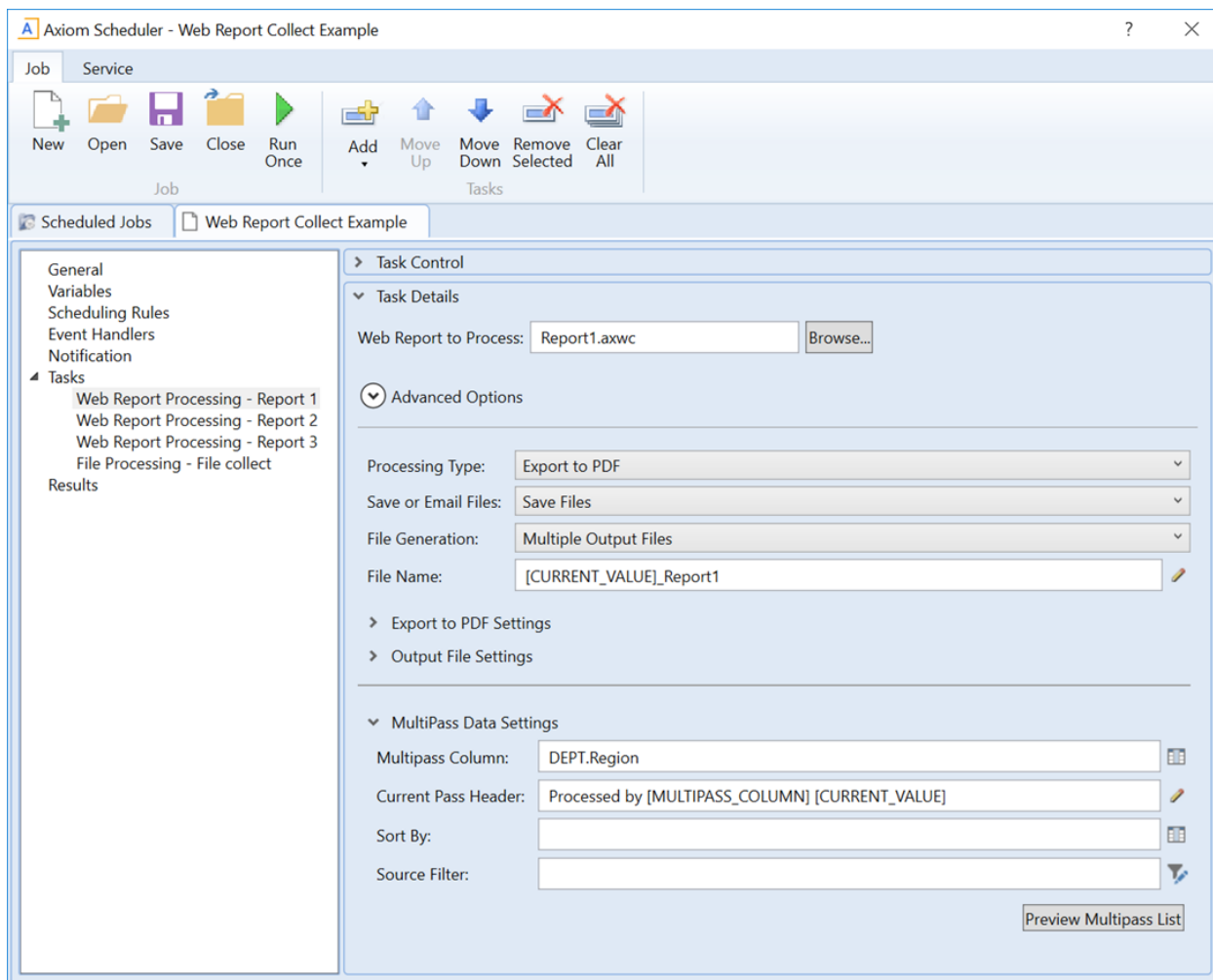
You can combine web report processing with the File Collect feature to create and deliver "report books". For example, you may have three different reports that you want to process by region, then you want to collect the output into region-specific report books to deliver to each regional manager.

This process works as follows:

- You set up multiple Web Report Processing tasks in Scheduler to process the web reports and save the output to a designated location. The output can be PDF or Excel.
- You set up File Collect in a separate spreadsheet utility to collect the output from the Web Report Processing tasks. This configuration specifies:
 - The type of files to collect, PDF or Excel.
 - The source folder(s) from which to gather the files to collect.
 - The file filter to specify the files to collect.
 - The file name of the output file, and the file type if applicable—PDF files can only be collected as PDF, but Excel files can be collected as either PDF or Excel.
 - The delivery method of the output file—save only, email only, or save and email—as well as the output folder and email settings (as applicable).
 - Optional common files to include in each output file, such as a cover page.
 - Optional multipass column to perform the file collect operation iteratively over a dimension
- You set up a File Processing task in Scheduler and configure it to run the File Collect report utility. Typically all of the tasks would be in a single Scheduler job, so that the Web Report Processing tasks are run first, then the File Processing task runs afterward to perform the final collect operation.

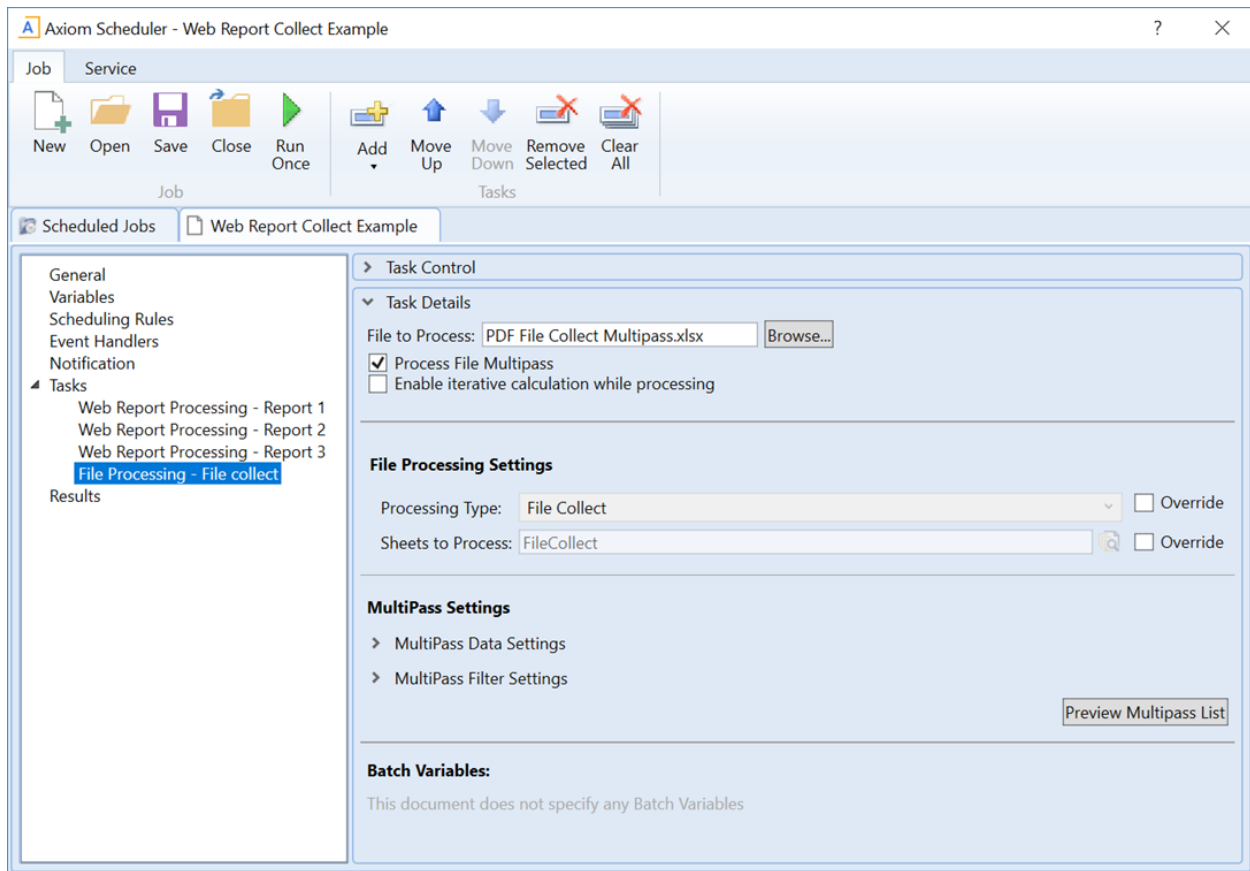
File Collect is an option of File Processing. It can be used to collect any PDF or Excel files, regardless of how they are generated. For more information on how to configure file collect, see the File Collect documentation.

The following example shows a Scheduler job with three Web Report Processing tasks and one File Processing task. The three Web Report Processing tasks are used to process three different web reports by region and then save the output files to a designated folder in the Axiom Strategy Management repository.



Example Scheduler job with multiple Web Report Processing tasks

The File Processing task is used to run the File Collect report utility once all of the Web Report Processing tasks are completed. Note that the File Processing task simply points to the spreadsheet report that contains the File Collect configuration; the settings are not defined within the Scheduler job.



Example Scheduler job with File Processing task to run the File Collect operation

The following screenshot shows an example of how the File Collect settings could be configured within the spreadsheet report. The File Collect operation will be performed using multipass processing by region. The file filter will collect all files in the source folder location based on the current pass region name, then save and email the output file. The email address and file name settings use a formula with a GetCurrentValue function in order to dynamically set the email address and file name for each pass.

Axiom Assistant

Home test_drill PDF File Collect Multipass Screenshot x

File Processing Settings

Processing Type: File Collect

Sheets to Process: FileCollect

Multipass Settings [Show Advanced View](#)

Source Column: DEPT.Region

[Preview Multipass List](#)

Actions

- [Refresh file lists in selected column\(s\)](#)
- [Refresh all file lists](#)
- [Add additional package columns](#)
- [Add new source folder section](#)
- [Add new file collect sheet](#)
- [Process file](#)
- [Process file multipass](#)

FILE COLLECT CONFIGURATION

Package name (Optional): Common Files

Active: Report Book

Source File Type (Excel or PDF): On

Email Settings

Email to list: jdoe@mycompany.com

Email CC list: noreply@mycompany.com

Email from: Monthly Report Book

Subject text: Attached is your regional monthly report book for June.

Body text: Normal

Message priority: On

Attach file to email: Off

Attach each file separately (don't combine them into one)

Source Folder Settings

File source (Axiom or Local): Axiom Repository

Source folder path: Axiom Repository

File filter list: Axiom\Reports Library\File Processing

(Multipass only) Filter template (e.g. (Dept.Dept)*.xlsx): "cover"

Source folder path: Axiom\Reports Library\File Processing

File filter list: *(Dept.Region)*.pdf

(Multipass only) Filter template (e.g. (Dept.Dept)*.xlsx)

Output File Settings

Output location (local file or Axiom): Axiom Repository

Output file purge setting (Axiom files only) - can be a static purge date or number of days: Axiom\Reports Library\Monthly Reports

Output folder path: Region_West_MonthlyReportPackage

Remote Data Connection Name: .pdf

Output file name (no extension): Save File and Send Email

Output file type: .pdf

Save or email generated files

File List Settings

Auto-generate file list: On

Continue On Error: On

Include common files in package: On

File List	File List
Axiom\Reports Library\File Processing	Axiom\Reports Library\File Processing
cover.pdf	West_Report1.pdf
	West_Report2.pdf
	West_Report3.pdf

Example File Collect configuration to collect the PDF output into a PDF report book

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	<p>Reports Library > Strategy Management Utilities > Home Pages</p> <ul style="list-style-type: none"> • Dashboard – Read only <ul style="list-style-type: none"> ◦ 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 <ul style="list-style-type: none"> ◦ 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 <ul style="list-style-type: none"> ◦ 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 <ul style="list-style-type: none"> ◦ 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	<ul style="list-style-type: none"> • Dashboard – Read only <ul style="list-style-type: none"> ◦ Can see Subscribed Initiatives in list ◦ Can access Initiatives approval process task page • Perspectives – Read only <ul style="list-style-type: none"> ◦ Can see all Initiatives related to each Objective and can click to access Initiative-related pages • Objectives – Read only <ul style="list-style-type: none"> ◦ 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 <ul style="list-style-type: none"> ◦ 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 system administrator 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	<ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> 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**.




Reference

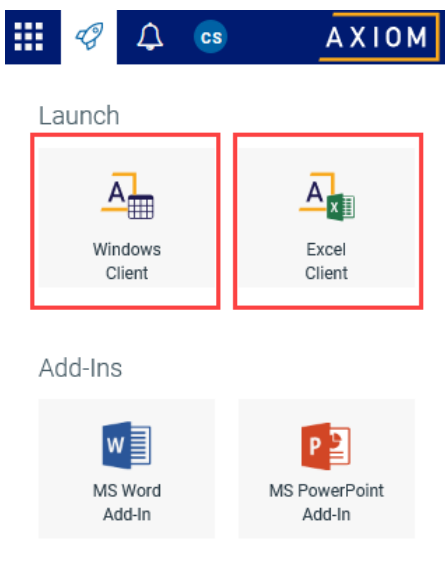
This appendix contains reference information for administrators configuring and maintaining Axiom Axiom.

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).

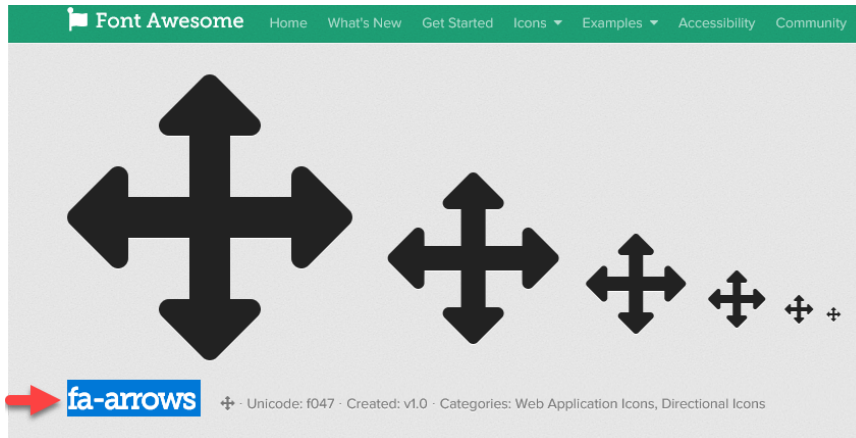


The application launches.

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.

Clinical Performance

Measure	Measure Description	Entity	Dept	Unit	Baseline	Prior	Current	Target
837	QTR-AHRQ Patient Safety Indicator Composite (Serious Complications)	0	0	Number	75.00	48.81	47.00	50.00

Performance icon Trend icon Prior measurement Current measurement Target

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.

Objective Performance	
	Accelerate resource optimization - clinic space, scheduling, staff
	Attract and Retain Top Talent
	Earn Highest Patient Satisfaction and Experience Scores
	Earn Industry Leading Patient Satisfaction & Experience Scores
	ED Wait Time Reduction, Improve Patient Flow
	Effectively Manage Controllable Supplies Expense related High-Cost Implants &
	Effectively Manage Labor Cost and Productivity in-line with Industry Best Practi
	Grow Primary Care Market Share 10%
	Grow Sleep Lab Clientele
	Improve Patient Access to Clinical Care
	Invest Capital Strategically in Support of Business & Financial Goals





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.
	<p>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.</p> <p>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.</p>
	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
▶ 1	Needs Attention	Digital Engagement	Rick Grayson	Dr Johnson	Active Tracking
▶ 26	On Track	New Initiative	Dr Johnson	Darryl Fleck	Initiative Creation
▶ 27	On Track	Admit Goal Written to Bed Occupied -	Rick Grayson	Dr Johnson	Active Tracking
▶ 28	On Track	Admit Order Written to Bed Occupied-	Tom Mckinlay	Jay Spence	Initiative Creation
▶ 29	On Track	Bed Assigned to Occupied	Rick Grayson	Dr Johnson	Initiative Creation
▶ 31	On Track	Testing the Workflow	Orlando Ramos	Orlando Ramos	Pending Reset
▶ 40	No Status	Reduce WTH voluntary turnover for rolling 12 month period ending June 30, 2020 to	Jeff Goldstein	Daniel Ziegler	Initiative Creation