Administrator Guide

Axiom Comparative Analytics

Version 2022.3

320 N. Sangamon St.
Suite 700
Chicago, IL 60607
(847) 441-0022
www.syntellis.com
info@syntellis.com

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Contents

Getting Started

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

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

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

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

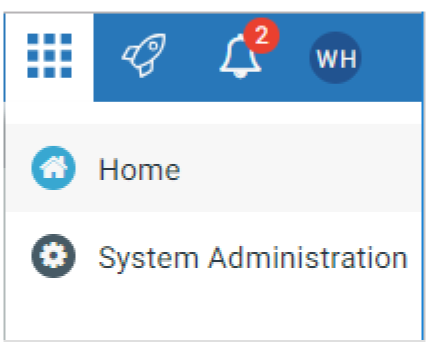
Home page

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

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

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

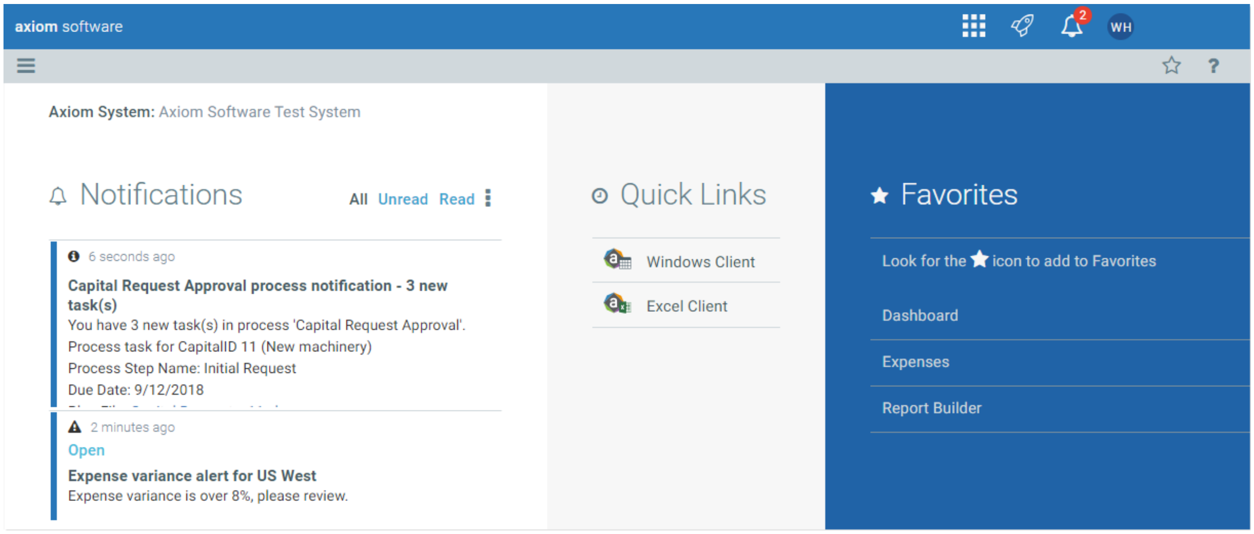
If you navigate away from the home page, you can return to it by using the Area menu in the Global Navigation Bar:



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

Default home page

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



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

Example On-Premise URL

`http://ServerName/Axiom/Home/Launchpage`

Where *ServerName* is the name of the Axiom Application Server, and Axiom is the default name of the virtual directory.

Example Cloud System URL

`https://CustomerName.axiom.cloud/Home/Launchpage`

Where *CustomerName* is the name of your cloud service system.

This page has the following features:

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

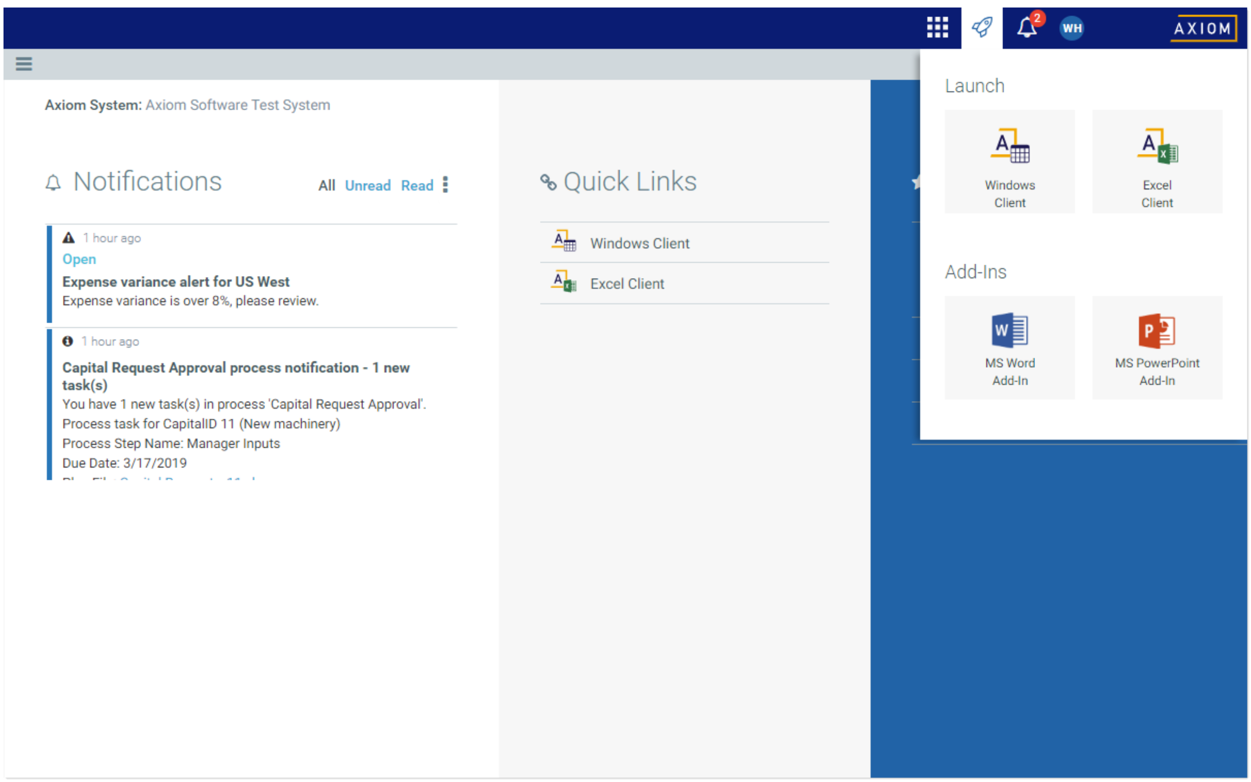
Launching Axiom Comparative Analytics applications

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

The Quick Launch menu serves the following purposes:

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

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



Quick Launch menu

Launching the Axiom Desktop Client

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

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

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

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

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

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

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Launching add-ins

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

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

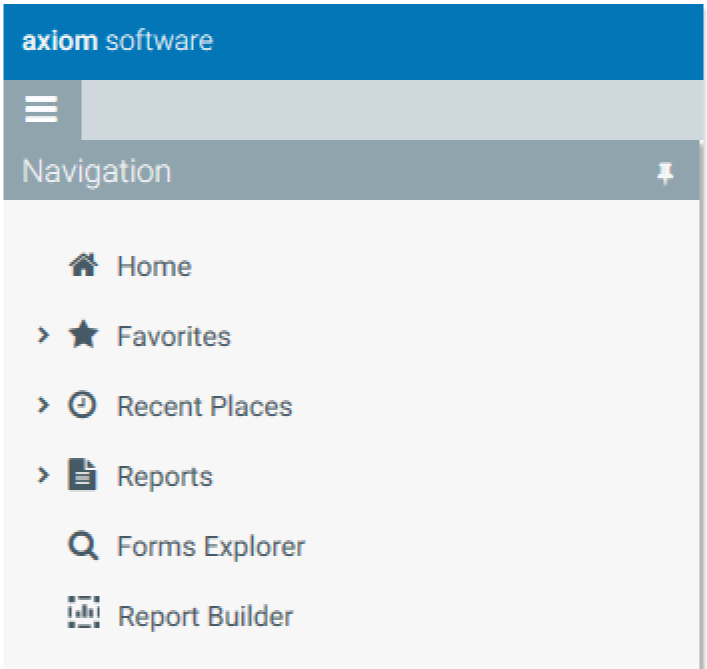
NOTE: One or both add-ins may not display in the menu, depending on your organization's preferences.

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

Navigation panel

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

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



Example Navigation panel

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

Area	Description
Default	Axiom Comparative Analytics provides a set of standard navigation links that show by default when you are in the Web Client. The previous screenshot shows the standard navigation links. These links provide access to your favorites, recent places, web-enabled reports and forms, and the Report Builder. The standard navigation links can be customized, so each customer's system may look different. Navigation links can only be customized by administrators using the Desktop Client. For more information on how to customize the panel, see Defining navigation links for the Web Client Navigation panel (Desktop Client Help).
System Administration	The system administration links show when you are in the System Administration area, and provide access to features such as the Table Manager, Audit Manager, and software updates. For more information, see System administration.
Product-Specific	Systems with installed products may have product-specific web navigation links. When you select a product name from the Area menu in the Global Navigation Bar., the product-specific links display in the Navigation panel. For more information, see the product-specific documentation.

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

Viewing system information

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

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

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

Getting to know the interface

Display area

Task panes

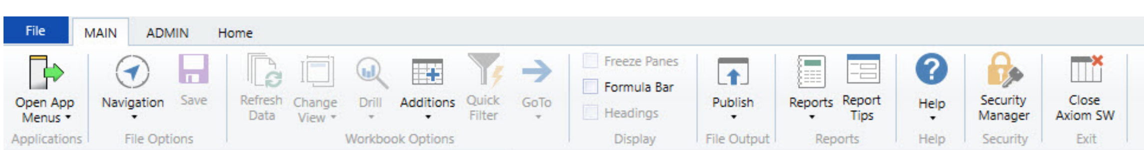
Ribbon tabs

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 displays only to those users assigned the Administrator role profile.

Main

Includes commands for accomplishing most tasks in Axiom:

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

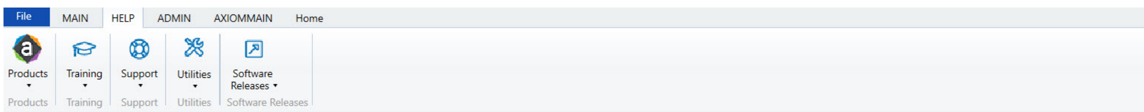


Admin

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

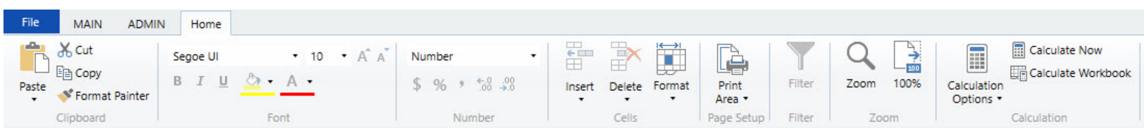
Help

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



Home

Includes standard spreadsheet commands.

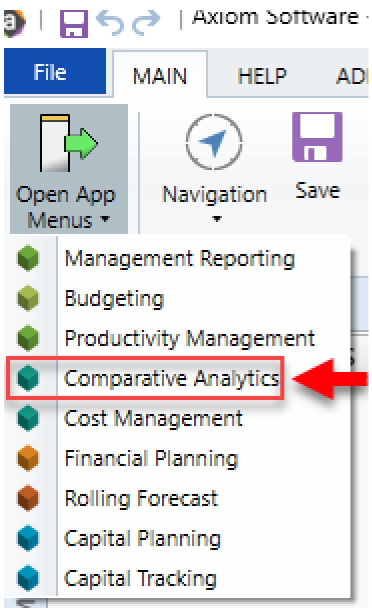


Opening the Axiom Comparative Analytics task panes

For Axiom Comparative Analytics, there are dedicated User task and Admin task panes.

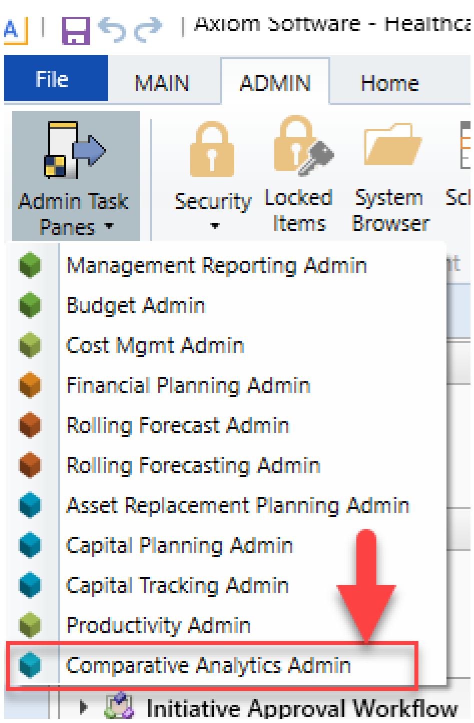
To open the Axiom Comparative Analytics user task pane:

In the **Main** ribbon tab, click **Open App Menus**, and select **Comparative Analytics**.



To open the Axiom Comparative Analytics Admin task panes:

1. In the **Main** ribbon tab, click **Admin**.
2. in the **Admin** toolbar, click **Admin Task Panes**.
3. Click **Comparative Analytics Admin**.

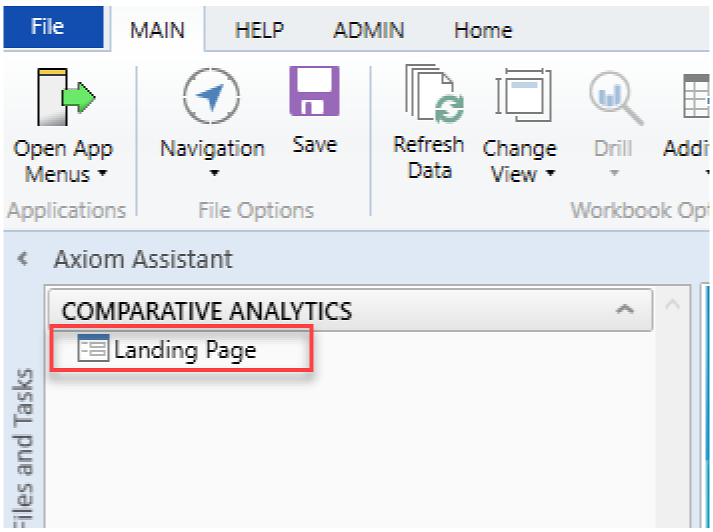


Opening the Comparative Analytics web form

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

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

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



Opening the Explorer task pane

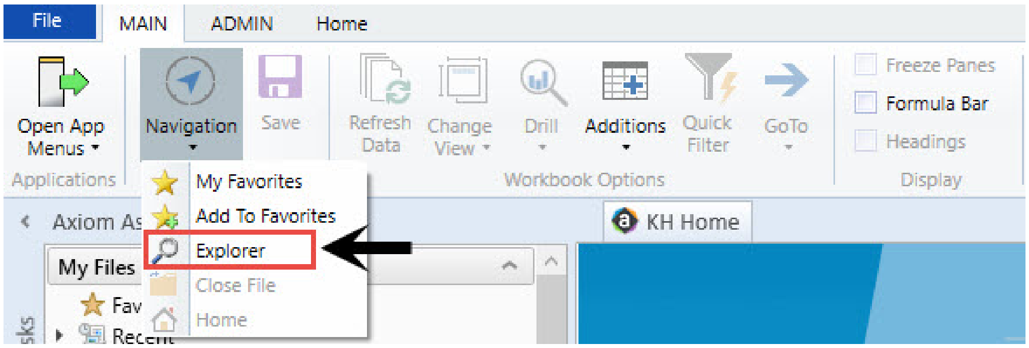
Axiom Comparative Analytics provides a built-in Explorer task pane so that you can quickly access your favorites, recent items, and all the files that you have rights to access.

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

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

To access the Explorer task pane:

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



Exiting Axiom Comparative Analytics

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

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

Working with Dimensions

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

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

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

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

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

Examples of validated columns include:

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

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

Working with the Dimension Maintenance utility

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

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

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

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

The Dimension Maintenance utility allows administrators to:

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

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

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

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

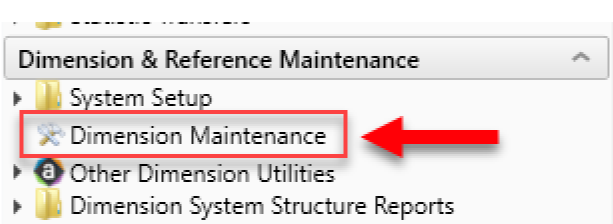
	Management Reporting Admin	Budgeting Admin	Rolling Forecast Admin	Capital Planning Admin	Capital Tracking Admin	Cost Management Admin	Costing Admin	DSS Admin	Financial Plan Admin
ACCT	✓	✓	✓			✓	✓		✓
CDMCode	✓	✓					✓	✓	
COSTCAT							✓	✓	
COSTITEM							✓	✓	
COSTMETHOD							✓		
COSTPOOL							✓	✓	
CPT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

Adding a dimension record

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

To add a dimension record:

1. In the Management Reporting Admin task pane, in the **Dimension & Reference Maintenance** section, double-click **Dimension Maintenance**.



2. To select the product to add the new dimension record, do the following:

a. Press **F9** or in the **Main** ribbon tab, in the **Workbook Option** group, click **Refresh Data**.

b. In the **Refresh Variables** dialog, from the **Select The Product To Edit** drop-down, select the Axiom Healthcare Product.

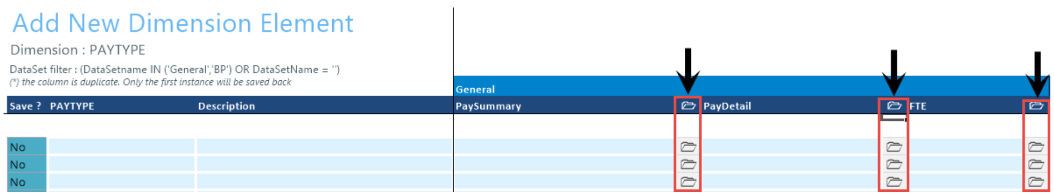
c. From the **Select a Dimension to Edit** drop-down, select the dimension.

d. Click **OK**.

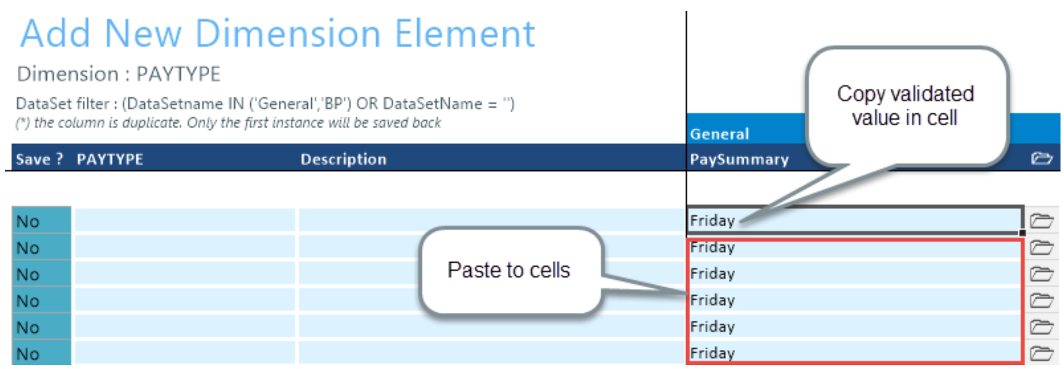
3. At the bottom of the workbook, click the **Add_New_Dimension** tab.

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

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

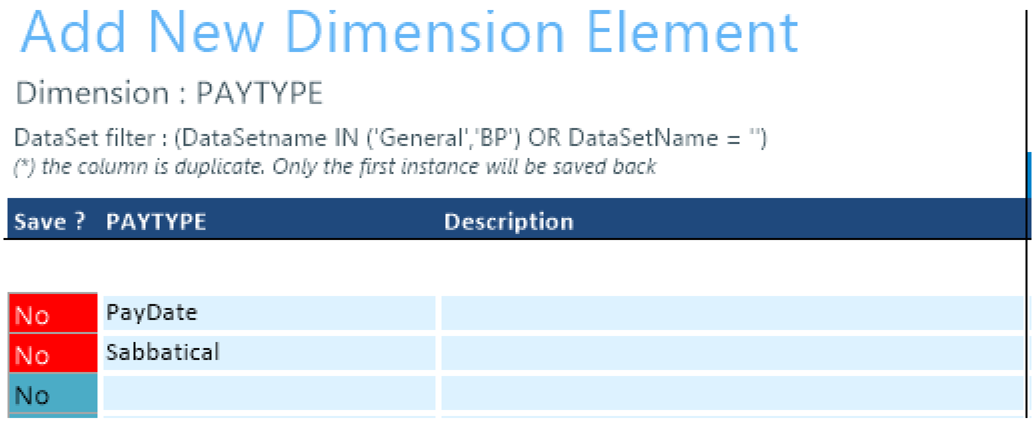


    - If you have a large number of entries to make, instead of opening each folder, you can copy and paste the validated value to other cells in the same column.



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

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



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

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

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

Editing a dimension

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

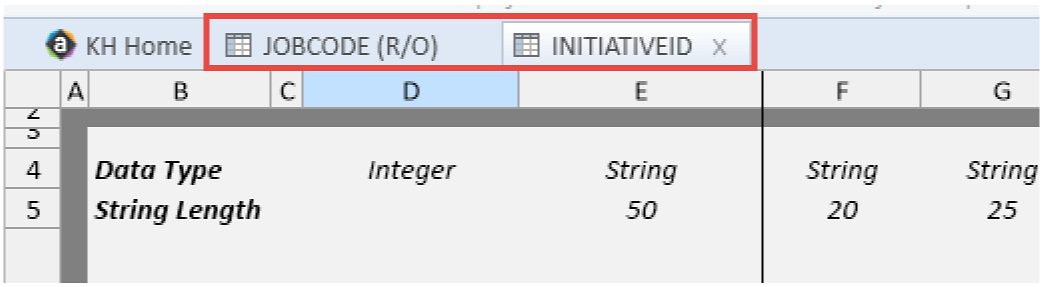
TIP: You never edit database tables directly in the database. Instead, data is pulled into spreadsheets, where you can edit the data and then subsequently save it back to the database.

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

When editing dimensions, keep in mind the following:

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

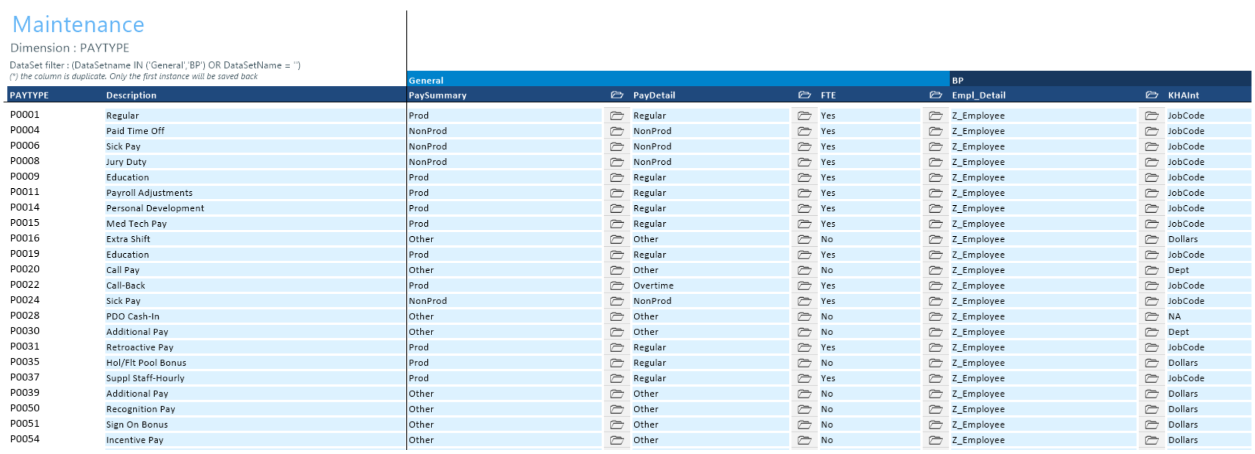
Some dimensions are not included in the Dimension Maintenance utility. You can continue to access and modify these dimensions from the Axiom product's Admin task pane, as usual. If the dimension you open displays as read-only, this means that you need to use the Dimension Maintenance utility to modify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



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

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

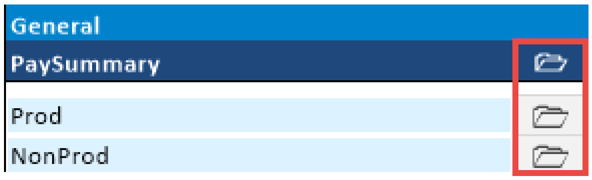
TIP: It is not always necessary to populate every field. Enter as much information in the dimension table as you have available.


Maintenance
Dimension : PAYTYPE
DataSet filter : (DataSetname IN ('General','BP') OR DataSetName = '')
(*) the column is duplicate. Only the first instance will be saved back

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

In the blue cells, you can do the following:

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



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

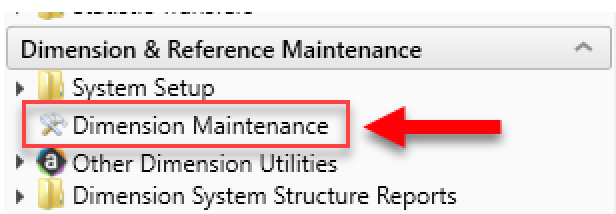
Grouping columns tagged as General display first, as shown in the previous example. General columns are typical reference fields leveraged by multiple products. Each subsequent grouping displays based on the products you selected. Records display depending on the security assigned to you. For example,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

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

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

To edit a dimension:

1. In the Management Reporting Admin task pane, in the **Dimension & Reference Maintenance** section, double-click **Dimension Maintenance**.

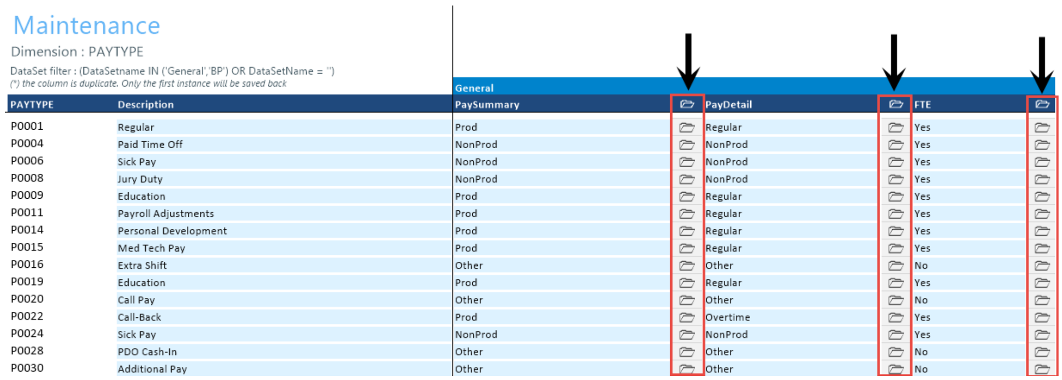
2. In the **Main** ribbon tab, click **Refresh Data**.
3. In the **Refresh Variables** dialog, do the following:
   a. In the **Select The Product To Edit** drop-down, select the product.

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

   b. In the **Select a Dimension to Edit** drop-down, select the dimension, and click **OK**.
4. To retrieve a smaller subset of data, you can use the **Quick Filter** in the **Workbook Options** of the **Main** ribbon tab.

5. Enter the dimension member attribute information in the appropriate cells. You can type a value in the cell free-form or select from a list of existing validated values. These are represented with a folder icon next to the grouping column. You can do one of the following to enter validated values:

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



Maintenance

Dimension : PAYTYPE

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

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

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

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

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

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

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

Dimensions used by Comparative Analytics

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

- ACCT: Includes records for each account in the GL of your organization. This includes accounts that can be found on the balance sheet, income statement, hours, and statistics.
- ComparativeAggregateBenchmark: Includes benchmark data for various aggregation levels.
- ComparativeAggregateMetric: Includes metric data for various aggregation levels.
- ComparativeAggregatePeerGroupAssignment: Includes benchmark data for peer group assignments.
- ComparativeAggregateType: Includes records for aggregate types, which indicate the type of data stored in dynamic tables.
- COMPARATIVEMEASURE: Includes records for the Metric Explorer Menu.
- DEPT: Includes records for each department within an organization. For example, radiology, emergency, finance, and so on.
- ENTITY: Provides basic information about the entities supported by the software and can determine for some products (for example, Cost Accounting) which entities to include in data processing.
- JOBCODE: Includes records for all of the JobCodes within your organization. Each JobCode represents a job position or role within the organization.
- PAYTYPE: Includes records for all of the possible categories of compensation that an employee might receive.
- Provider dimensions: Includes records for all providers within the organization, and additional dimension tables and fields if your organization has purchased the Provider module.

ENTITY

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

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

Column	Description
ENTITY	The primary key for the table using an integer data format.
Description	The long entry description.
Abbrev	The standard abbreviation for the entity.
Beds	The bed size of the entity.
PayCycle	The entity's primary pay cycle.
VarAmount	The reporting variance amount in dollars.
VarPercent	The reporting variance amount in percent.

Column	Description
Costing	Do one of the following: • If the entity is used in Axiom Cost Accounting, select **True**. • If the entity is not used in Axiom Cost Accounting, select **False**.
KHAStandardClass	Used for reporting.
MPN	Used to store the Medicare Provider Number.
State	Used to identify the state.
Active	Indicates whether the entity is active (True) or inactive (False).

ACCT

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

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

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

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

Column	Description
ACCT	The Axiom Software account number. This can be the combination of the prime account and sub account, if that is how your GL system is set up.
Description	The account description from the GL. Do not enter a description in all capital letters. To remove the all-caps format in the spreadsheet, use the Proper formula =Proper().
Credit	Used during the interface process to reverse the signs so values are stored in a positive condition in the database. Select one of the following entries: • **dr** • **C** Normally, Revenue and Liabilities are C, and all others are dr.
RptMap	Used to group accounts. Valid entries include any account numbers in the ACCT column. The system automatically copies the information in the ACCT column to this column during installation.

Column	Description
Statement	Used to identify the Financial Statement category. Select one of the following entries: • **BS (Balance Sheet)** • **HoursJC (Jobcode Hours)** • **Hours** • **IS (Income Statement)** • **KeyStat** • N**I (New Initiatives)** • **SCA (Cost Management)** • **Statistic** • **VCC (Variance Comments Collection)** **NOTE:** This is an Axiom standard column and categories cannot be added or edited. The default value is NA.

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

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

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

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

Column	Description
KHASum	Used to summarize information from the Stat_Rev and Expense sheets to the Summary sheet within the budget plan files. **NOTE:** This is an Axiom standard column and categories cannot be added or edited. The default value is NA.

CYPMethod	Used to identify the methodology used for projecting the remainder of the current fiscal year. Valid entries are dependent upon values in KHAStdLine column:
	
	• Input Monthly, Detail, or any of the Fixed Options:
	    ◦ Rolling12 – Use historical values from previous year's same months
	    ◦ Annual –- Annualize YTD value
	    ◦ RemBud – Use remaining budget
	    ◦ CapBud – Use Total Budget less YTD actual
	    ◦ PctBud – Use percentage of CY Actual over Budget
	• Variable – Use Variable
	• Labor – Use Labor
	• FICA – Use FICA
	• Hours – Use Hours
	• GlobalExpense – Use GlobalExpense
	• Depreciation – Use Depreciation
	• IP_Per_Unit – Use IP_Per_Unit
	• OP_Per_Unit – Use OP_Per-Unit
	• Oth_Per_Unit – Use Oth_Per_Unit

PhyStdLine	Used to identify default budget methodology used in the Provider budget plan files (departments which have PhyStdLine in KHACMDimGrp column of the DEPT dimension table) during budget plan file creation. Refer to Provider Version Only: Calc Methods - Stat_Rev Sheet and Expense Sheet in the *Axiom Budgeting and Performance Reporting Administrator's Guide* (Budget Plan Files chapter) for valid entries and definitions. The default value is NA.

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

Column	Description
BudStat	Identifies Budget Statistic accounts used in Budget Statistics Driver. Standard entries are: • Admits • PatientDays • Discharges • AdjDischarges • Encounters • ERVisits • ClinicVisits You can also create custom stats to use in the Budget Statistics Driver and identify accounts appropriately. The default value is a blank.
CMStdLine	Used to identify the StdLine for Axiom Cost Management.
KHAStandardClass	Standard classification used for reporting.
BPCategory	Used to identify the Budget Planning category.
NewDeptStdLine	Used to set or update the calc method for each department.
InitStdLine	Use to make accounts available for initiatives in the Axiom Budgeting budget workbook. In the **Choose Value** dialog for the InitStdLine, there are five validated values to select from. The following table lists the Initiative Standard Lines that we recommend you assign to each account type: • Statistics accounts to use Detail Line • Patient Revenue accounts to use Patient Revenue • Other Revenue accounts to use Detail Line • Deduction accounts to use Detail Line • Labor accounts to use Detail Line • Benefit accounts to use Detail Benefits w Percent • All other expense accounts to use Detail Line • Hours accounts to use Hours Line • For accounts not configured, NA will be the default value
RFCode	Identifies the RFCode for account. Only used with Axiom Rolling Forecast. The default value is Z_Exclude.
CM_Group	Used to summarize account types at a higher level for Axiom Cost Management analysis and reporting needs.

Column	Description
InitType	Used by the system to select the sections so that when the user refreshes the plan file, the accounts will insert into the appropriate section of the Initiative block in the Axiom Budgeting budget workbook. In the **Choose Value** dialog for the InitType, you can configure up to seventeen possible values. The section types available are noted in the following list. NA is the default value until configured or for any account not configured. • Benefits • ContractLabor • Deduction • Depreciation • Drugs • Hours • Interest • IPRev • NA • OPRev • OtherExp • OtherRev • ProFees • PurchSvcs • Salaries • Statistic • Supplies
CM_NonLabor	Used to classify non-labor accounts in Axiom Cost Management according to FSDetail. Valid entries include the following: • Drugs • KeyStats • OtherExp • PurchSvcs • Supplies These classifications are used in reporting and plan creation.
CM_Map	Used to map accounts together in Axiom Cost Management. You can use this column to map closed accounts with another existing account or to group like accounts.

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

DEPT

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

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

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

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

Column	Description
LaborType	Used to identify the labor method to use for plan file creation. Valid options are: • **altEmployee** • **Employee** • **HHLabor** • **JobCode** • **JobCodeADC** • **NoBudget** • **Staffing** **NOTE:** This is an Axiom standard column and categories cannot be added or edited. The default value is NA.
CM_Map	Similar to RptMap, used to consolidate departments for reporting.
KHACMDimGrp	Used to identify the Standard Line selected from the ACCT dimension for use in budget planning specifically for the budget values. Valid options are the options used on the ACCT dimension. For example, the common ones used include: KHAStdLine, PHYStdLine.
CM_TeamMap	Used to create team-planning workbooks. You can create teams by combining like departments or like accounts for team Axiom Cost Management planning.
JobcodeDimGrp	Used to designate which labor type distribution set applies to the associated department. KHAInt is the standard set of job code labor types. PhyInt is the modified set of job code labor types.
ProjDimGrp	Used to identify the Standard Line selected from the ACCT dimension for use in budget planning specifically for the projection values. Valid options are the options used on the ACCT dimension. For example, the common ones used include CYPMethod.
CM_Team	Create teams by combining like departments for team Axiom Cost Management planning.
KHABgtMap	Used for combining departments during plan-file creation. This column is also used when more than one department is needed in one plan file.
CM_Division	Used to group similar departments for Axiom Cost Management reporting and analytics.

Column	Description
CYFDimGrp	Used to identify which CYFMethod column each department uses to forecast accounts. Valid options are: • CYFMethod - Uses the method specified in ACCT.CYFMethod • NA - Not Applicable • [Other Column Name] - Uses the method specified in the corresponding column on the ACCT dimension table
FPNode	Used to group the department to the appropriate FPNode in Axiom Financial Planning.
ShowOnList_Costing	Determines which departments to include in the unit cost processing.
CM_BMarkStatus	Used to define which departments to include in Axiom Cost Management benchmarking reports and analytics. Valid entries include the following: • To include the department, type **Yes**. • To exclude the department, type **No**.
FPType	Used to group the department to the appropriate FPTYPE in Axiom Financial Planning.
Owner	Used to identify the network ID of the person responsible for initial input of the plan file (i.e. Manager). It should be the same as their Axiom login ID. Naming convention would be first initial, full last name (or whatever your network ID naming convention is).
DeptType	Determines the Direct or Indirect department category. Direct departments are those that generally provide patient care services and generate revenue, while Indirect departments are involved in support services and do not generate patient care related revenue.
FPNodeBS	Balance Sheet node for Axiom Financial Planning.
Reviewer	The network ID of the person responsible for reviewing the cost management plan, for example, Director. This information should be the same as the user's Axiom Software login ID. The naming convention is first initial, full last name or whatever your network ID naming convention is.
Approver	The network ID of the person responsible for approving the cost management plan, for example, VP. This information should be the same as their Axiom Software login ID. The naming convention is first initial, full last name or whatever your network ID naming convention is.

Column	Description
CM_DeptStandard	Used for mapping departments to external benchmark data. This mapping matches the department to the ExternalBMark information in the Axiom Cost Management file groups.
CM_PdHrsMetricID	The paid hours metric ID from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CM_WkdHrsMetricID	The metric ID for worked hours from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CM_NonLabor1MetricID	The metric ID for NonLabor 1 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CM_NonLabor2MetricID	The metric ID for NonLabor 2 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_Benchmarks_yyyy tables. Used only in Axiom Cost Management.
BudLocalAdmin1	Used to select the local administrator for Axiom Budgeting.
CM_CombineStat	Used to determine if key statistics should be combined when grouping departments together with CM_Map grouping column for Axiom Cost Management. Valid entries include the following: • If the key statistics of the rolled up departments are to be cumulative, type **Y**. • To only use the key statistics from the surviving department, type **N**.
CM_NonLabor3MetricID	The metric ID for NonLabor 3 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_Benchmarks_yyyy tables. Used only in Axiom Cost Management.
CM_NonLabor4MetricID	The metric ID for NonLabor 4 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_Benchmarks_yyyy tables. Used only in Axiom Cost Management.

Column	Description
CostMap	Allows departments to processed as a group in the unit cost processing phase of cost accounting. All costs for the group are combined and allocated to all of the Cost Items within the group. In most cases, the first or largest department of the groups becomes the target CostMap definition to which the other members are mapped.
ShowOnList_Budgeting	Used to identify if a department displays to be selected during the plan file creation process. Valid entries include the following: • **True** • **False**
CM_NonLabor5MetricID	The metric ID for NonLabor 5 from external benchmark. Elements are validated to the MetricID table. Used to link a department with specific metrics in the CM_Benchmarks_yyyy tables. Used only in Axiom Cost Management.
BudLocalAdmin2	Used to select the local administrator for Axiom Budgeting.
MarkupName	The specified markup table to use when processing unit costs using the Reverse Markup method. **NOTE:** Currently only one table is available per department.
BudLocalAdmin3	Used to select the local administrator for Axiom Budgeting.
FinContact	Used to assign the finance contact for a department during the cost management process.
KeyStatDesc	Used to identify the description of the primary statistic for each department.
FlexGroup	Used for grouping departments together for the flexible budget utility. (For example, Imaging).
FlexDept	Used for defining each department as fixed or variable during the flexible budget utility. Valid entries include the following: • **Yes** • **No** • **NA**
Campus	Used as part of Axiom Cost Accounting.
KHAStandardClass	Used for reporting.

Column	Description
RFGroup	Used to define your forecast groups. Consider: • Management structure and cultural impact. • Team concept versus individual department managers. • The availability of a statistic that can be collected.
CM_ShowOnList	Used to define which departments to build Axiom Cost Management plan files. Valid entries include the following: • To build a plan file, type **TRUE**. • To exclude from plan file lists and build, type **FALSE**.
CM_PlanGroup	Used to group departments together for applying assumptions and configurations in Axiom Cost Management driver files.
CM_ ExtBenchmarkSource	The source name of the external benchmark to use for this department in Axiom Cost Management. Used to link a department with the CM_ Benchmarks_yyyy tables.
ShowOnList_Capital	Used to define which departments to build Axiom Capital Planning plan files. Valid entries include the following: • **True** • **False**
PM_IT	The IT reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_Facilities	The Facilities reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_Clinical	The Clinical Engineering reviewer assigned for Process Management in the Axiom Capital Planning and Capital Tracking systems.
PM_Voting	The owner of the prioritization process assigned for Process Management in Axiom Capital Planning and Capital Tracking.
ProviderType	Select, by dept, whether to use the Detail or Summary options for provider plan files.
PM_Legal	The Legal reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_HR	The Human Resources reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_Purchasing	The Purchasing or Supply Chain reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.

Column	Description
PM_CFO	The Chief Financial Officer reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_CEO	The Chief Executive Officer reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_BOD	The Board of Directors reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
PM_Accounting	The Accounting reviewer assigned for Process Management in Axiom Capital Planning and Capital Tracking.
CM_DeptSeries	Groups departments into service lines or other client-defined series for Axiom Cost Management analytics and reporting.
CompAnEntityMap	Used for Comparative Analytics only to consolidate financial information into more applicable groupings for comparison purposes. This column is used for grouping entities.
CompAnDeptMap	Used for Comparative Analytics only to consolidate financial information into more applicable groupings for comparison purposes. This column is used for grouping departments.

JOBCODE

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

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

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

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

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

PAYTYPE

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

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

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

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

Column	Description
GLAcct	Used to identify the account number to use for dollars on the GL. Valid entries include the following: • If your payroll data maps to the GL-based upon job code, type **0** (zero). • If your payroll data does not map to the GL-based on job code, type the GL salary account from the ACCT dimension table.
HRAcct	Used to identify the account number to use for hours on the GL. Do one of the following: • If your payroll hours map to the GL-based upon job code, type **0** (zero). • If your payroll hours do not map to the GL-based on job code, type the GL hours account from the ACCT dimension table.
JobCode	The pay type summary groupings used for plan-file processing when using the Jobcode labor method. Must be a valid pay type.
Staffing	The pay type summary groupings used for plan-file processing when using the Staffing labor method. Must be a valid pay type.
Employees	The pay type summary groupings used for plan-file processing when using the Employee labor method. Must be a valid pay type.
Providers	The pay type summary groupings used for plan-file processing when using the ProviderComp labor method. Must be a valid pay type.
KHAStdLine	Used to identify default budget methodology used in budget plan files during budget plan file creation. Refer to the calc methods for the Stat_ Rev sheet and Expense sheet in the *Axiom Budgeting and Performance Reporting Administrator's Guide* (Budget Plan Files chapter) for valid entries and definitions. Default is **NA**.
CDMStdLine	Used to identify default budget methodology for CDM budget plan files (departments which have CDMStdLine in KHACMDimGrp column of DEPT Dimension) during budget plan file creation. It is used similarly to KHAStdLine in Budget Planning workbooks. Valid entries include the following: • Statistical accounts = CDMStatistic • IP Revenue accounts = CDMIPRevenue • OP Revenue accounts = CDMOPRevenue Copy the remaining account assignments from KHAStdLine column.

Column	Description
Accrue	Used to identify paytypes to be included when using the payroll accrual utility. Valid entries include the following: • To accrue during monthly payroll accrual process, type **Yes**. • To not accrue during monthly payroll accrual process, type **No** or **NA**.
RFPAYCLASS	Not used at this time.
CostVariable	Not used at this time.
CM_PlanCode	Used for combining pay types during Axiom Cost Management reporting and plan-file creation. If there are historical values for two pay types that you want to report as one combined pay type, list the surviving pay type on both lines.
CM_PayCategory	Used in Axiom Cost Management to group individual pay types into summary categories for planning purposes. Examples include the following: Regular, Overtime, Education, PTO, Contract, Other, Stat.
CM_Paid	Used to identify the pay type to include in the Paid Hours calculations in Axiom Cost Management. Valid entries include the following: • For paytypes that will be included in paid hours, select **Yes**. • For paytypes that will not be included in paid hours, select **No**.
CM_Worked	Used to identify the pay type to include in the Worked Hours calculations in Axiom Cost Management. • For Pay Types that will be included in worked hours, select **Yes**. • For Pay Types that will not be included in worked hours, select **No**.
CM_PaidDLLRS	Used to identify the pay type to include in the Paid Dollars calculations in Axiom Cost Management. • For Pay Types that will be included in paid dollars, select **Yes**. • For Pay Types that will not be included in paid dollars, select **No**.
CM_WorkedDLLRS	Used to identify the pay type to include in the Worked Dollars calculations in Axiom Cost Management. • For Pay Types that will be included in worked dollars, select **Yes**. • For Pay Types that will not be included in worked dollars, select **No**.
ResourceCalculation	Determines the calculation behavior for the hours or dollars within the PAYTYPE when using the payroll information within the RVU development process. When labor rates are calculated for the Resource Table, the designation here determines if the Hours, Dollars, or Both are to be used in the numerator and denominator in the average.

Column	Description
CMStdLine	Used during the interface process to assign the standard planning method to use for each pay type. In other words, this identifies the desired formula to use to calculate Axiom Cost Management initiatives. It is used similarly to KHAStdLine in Budget Planning workbooks.

Options for Acct.FSDetail

- A_AccumDepr
- A_AR
- A_ARAllow
- A_BoardInvest
- A_BondAmort
- A_BondCost
- A_Cash
- A_CashInvest
- A_CIP
- A_CurLtdAsset
- A_CurOtherAsset
- A_CurReceivable
- A_Inventory
- A_Land
- A_LTNotesRec
- A_LTOtherAsset
- A_PPE
- A_Prepaid
- A_RelatedParty
- A_ThirdPartyRec
- A_Trusteed
- C_Comments
- D_BadDebt
- D_Charity
- D_Contractual
- D_Discounts
- E_BadDebt
- E_Benefits

- E_Depreciation
- E_Drugs
- E_Insurance
- E_Interest
- E_MaintRepairs
- E_MedSupplies
- E_OtherExp
- E_OthSupplies
- E_ProFees
- E_PurchSvcs
- E_RentLease
- E_Salaries
- E_SalariesContract
- E_SalariesMid
- E_SalariesPhy
- E_Utilities
- F_ContractFTEs
- F_NonProdFTEs
- F_OvertimeFTEs
- F_ProdFTEs
- H_Contract
- H_JCHours
- H_Midlevel
- H_NonProd
- H_Overtime
- H_Physician
- H_Prod
- L_AccExpense
- L_AccPayroll
- L_AP
- L_CurLTDebt
- L_CurOthLiab
- L_LTDebt
- L_LTOther1
- L_LTOther2
- L_ThirdPartyPay
- M_BmarkAdjD
- M_BmarkNOR

- M_DEPUOS
- M_NonLabor
- M_ONLPUOS
- M_PSPUOS
- M_SEPUOS
- M_TContPct
- M_TEducPct
- M_TEPUOS
- M_TFTERate
- M_TOTPct
- M_TPHUOS
- M_TUOSRate
- M_TWHPUOS
- N_NetAsset
- N_NetAssetPerm
- N_NetAssetTemp
- NA
- Q_Restricted
- Q_RestrictedPerm
- Q_RestrictedTemp
- Q_Unrestricted
- R_IPRev
- R_NonOpContrib
- R_NonOpExtraord
- R_NonOpGainLoss
- R_NonOpInterest
- R_NonOpInvest
- R_NonOpOther
- R_NonOpRev
- R_OPRev
- R_OtherRev
- R_OthPtRev
- S_Admits
- S_Deliveries
- S_Discharges
- S_Encounters
- S_ER Visits
- S_GenStat

- S_Global
- S_KeyIP
- S_KeyOP
- S_KeyOth
- S_Newborn
- S_OthStat
- S_PatientDays
- S_PayorDays
- S_PayorDisch
- S_PayorVisits
- S_StatOth
- Z_Exclude

3

Administering and Maintaining the System

Delete this text and replace it with your own content.

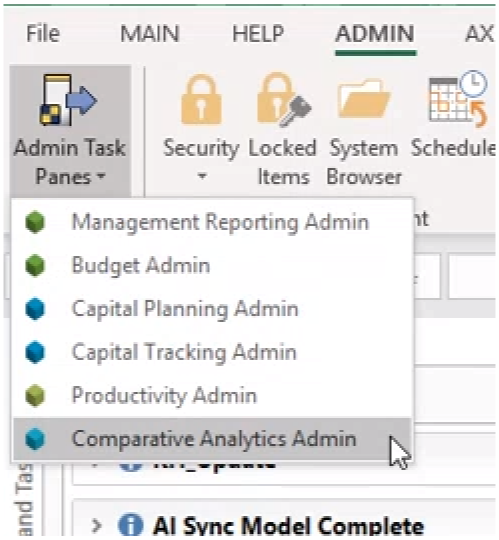
Creating new year budget tables

Tables for actuals (GL, Payroll, RevUsage, etc.) are added every year through the package. New Year Budget Tables will be added through the Comparative Analytics Admin Menu. You must create a new set of BUD, PAY12, and PAY27 tables at the beginning of the next fiscal year.

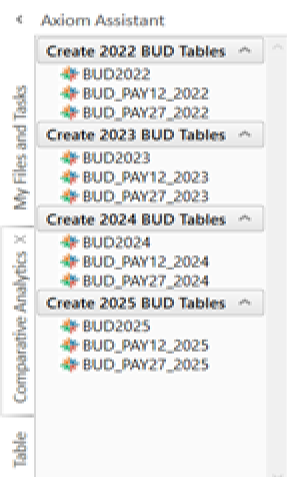
> **IMPORTANT:** You must have **both** the Management Reporting Admin and the Comparative Analytics Admin roles in order to execute this task.
>
> If you have the Budget Planning product, you do not need to perform this task because it is completed during budget setup.

To create new tables:

1. In the Windows Client, in the task ribbon, click **Admin**.
2. Click **Admin Task Panes**.
3. Click **Comparative Analytics Admin**.



4. In the **Comparative Analytics** task pane, double-click the BUDYYYY, BUD_PAY12_YYYY, and/or BUD_PAY27_YYYY tables you need to create.



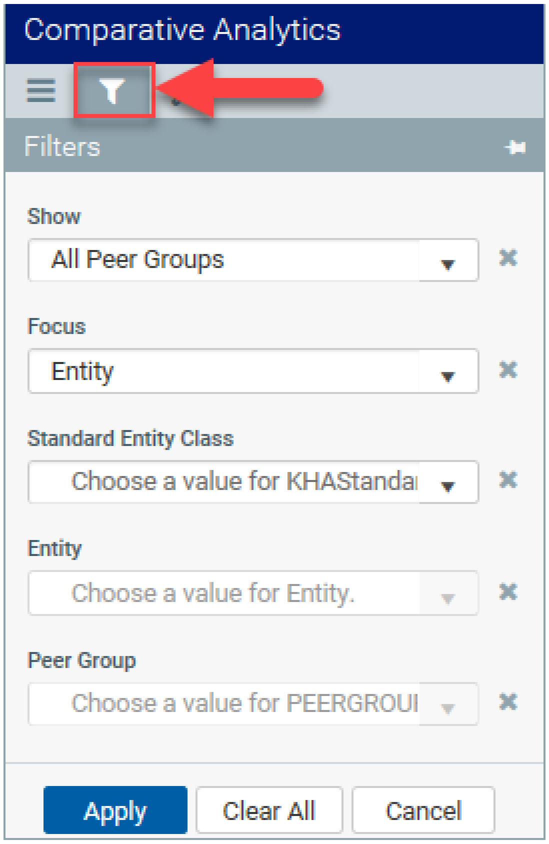
Setting peer group priority

Use the Peer Group Priority Update page to select a primary peer group that displays automatically for a specific entity in certain dashboards. You can select a primary peer group for each entity.

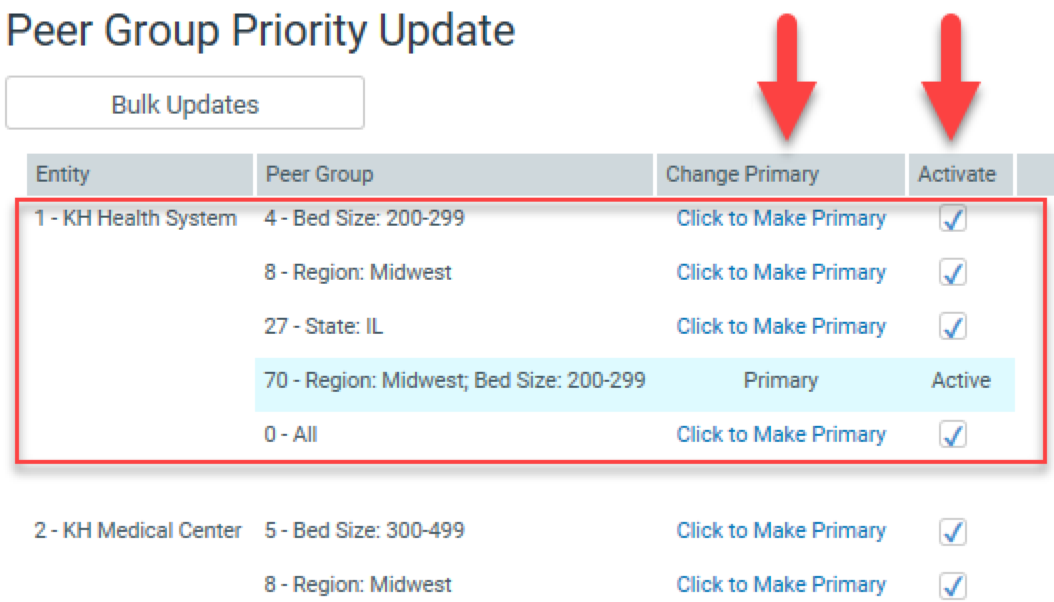
> **NOTE:** Priority selections affect the data displayed on the Expense Opportunity, Detailed Department Report, Entity Performance, and Metric Explorer dashboards.

To set a priority peer group:

1. On the Comparative Analytics home page, click **Update Peer Group Priority**.
2. In the toolbar, click the **Filter** icon.



3. Select filter options from the drop-downs. For example, to see all peer groups for each entity, in the Show drop-down, click **All Peer Groups** and, in the **Focus** drop-down, click **Entity**.
4. Click Apply.
5. In the **Change Primary** column, click **Click to Make Primary** to make the associated peer group the primary peer group for the associated entity.
6. In the **Activate** column, click the check box to make the associated peer group active, for that entity, in the dashboards. If the box is checked, the associated peer group will display for that entity in each dashboard. If the box is unchecked, the associated peer group will not display for that entity in any dashboard.



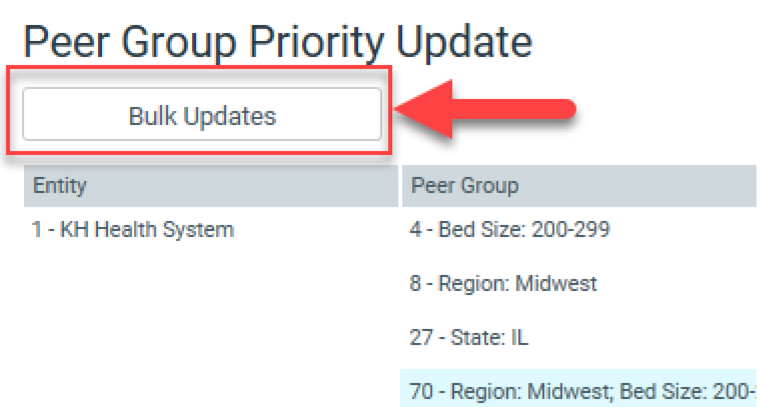
Bulk updates to peer group priority

You can also make bulk updates to the primary peer groups. Use the bulk update function to set a primary peer group across all entities or departments displayed, deactivate a peer group across all displayed entities/departments, or activate a peer group across all displayed entities/departments.

For simplicity, in the instructions below, we will continue using the example of making changes to entity peer groups.

To make bulk updates:

1. On the Peer Group Priority Update page, click **Bulk Updates**.



2. In the **Bulk Updates** dialog, click the **Select a Peer Group** drop-down to select a peer group.
3. Do one of the following:
   a. Click **Make this the Primary Peer Group** to make the selected peer group primary across all displayed entities. No change will apply to entities that do not have the selected peer

group.

b. Click **Deactivate this Peer Group** to deactivate the selected peer group. This peer group will no longer display in dashboards.

> **NOTE:** Peer groups that are already designated as primary cannot be deactivated. In those cases, you must set a new primary peer group before deactivating.

c. Click **Activate this Peer Group** to activate the selected peer group. This peer group will now display in dashboards. No change will apply to entities that do not have the selected peer group.

4. Click **OK**.

> **NOTE:** You must run the Axiom Intelligence Data Update process from the Comparative Analytics home page for peer group priority changes to take effect immediately. Otherwise, the change will not take effect until the system runs the update that night.

Loading the latest data set

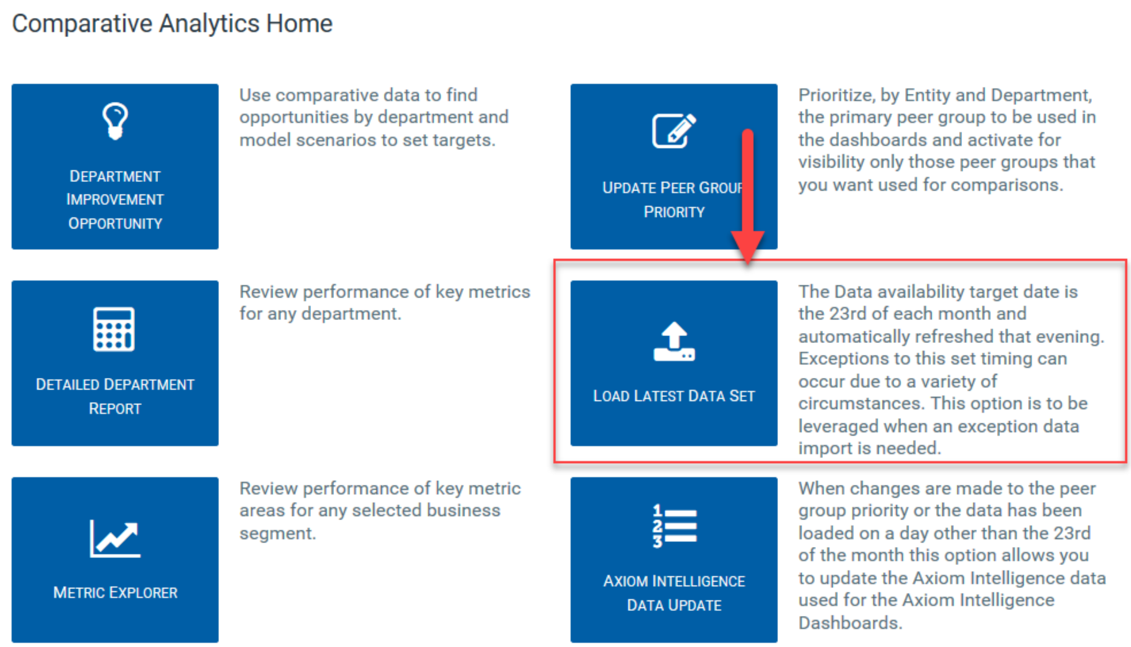
Axiom Comparative Analytics automatically loads the latest data set on the 23rd of each month and refreshes the system with that data in the evening.

We understand that you may need exceptions to this timing for a variety of a reasons. As a result, Comparative Analytics allows administrators to manually load the latest data set.

To load the latest data set:

1. Navigate to the Axiom Comparative Analytics home page.
2. Click **Load Latest Data Set**.
3. In the **Warning** dialog that displays, click **Yes**.

> **IMPORTANT:** We recommend that you only perform this function in the evening. Depending on the size of your organization and server activity, it may take Axiom Comparative Analytics several hours to load the latest data set. No Comparative Analytics data will be available during this process.



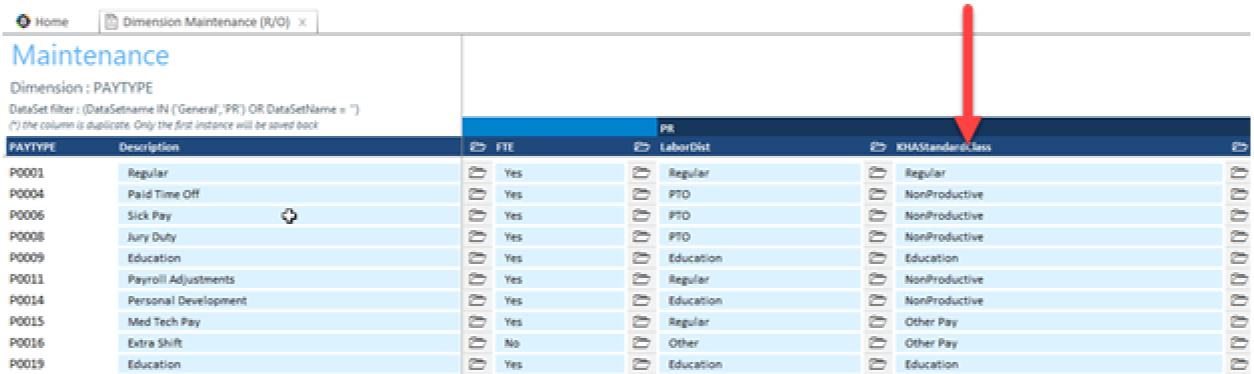
Setting up data mapping for Axiom Comparative Analytics

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

- Entity
- Dept
- ACCT
- Jobcode
- Paytype

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

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

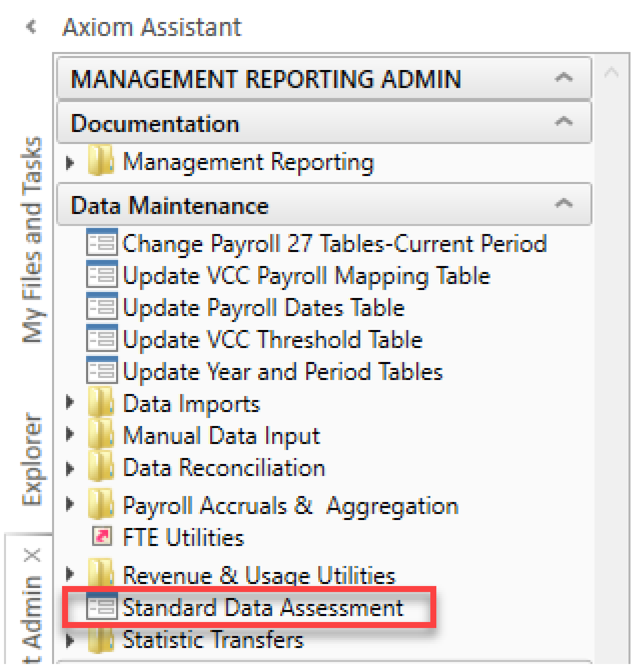


NOTE: The **KHAStandardclass** column needs to be updated in *each* dimension table.

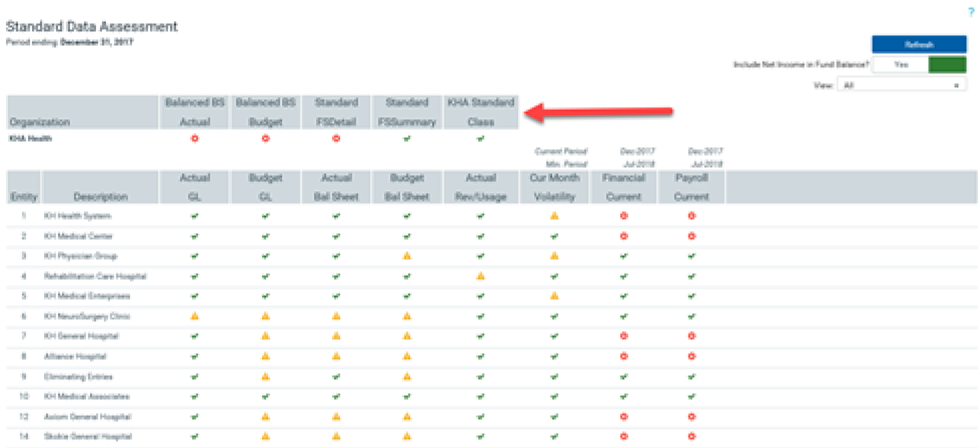
To ensure continuous compliance, review the **Standard Data Assessment** report and update dimension tables as needed.

To review the Standard Data Assessment report:

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



2. In the Standard Data Assessment report that displays, the **KHA Standard Class** column displays a green check mark, as shown in the following image. If you do not see a green check mark, you must update the dimension tables again.



Managing physician new year budget tables

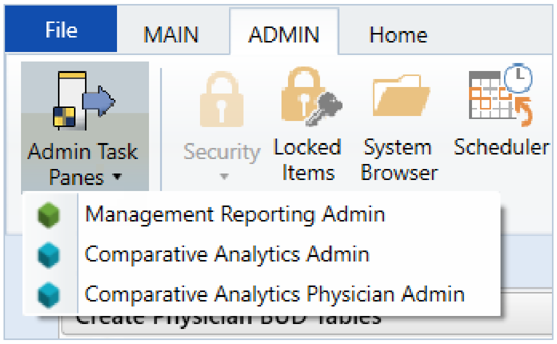
Use the Comparative Analytics Physician Admin task pane to add, as needed, physician new year budget (BUD_PROV_YYYY) tables.

NOTE: This task is typically performed at the beginning of a fiscal year.

IMPORTANT: You do not need to perform this task if you have a license for Physician Budget Planning, because it is performed during the budget process. If you do not have a license for Physician Budget Planning, contact your sales representative or Client Relations Executive for more information.

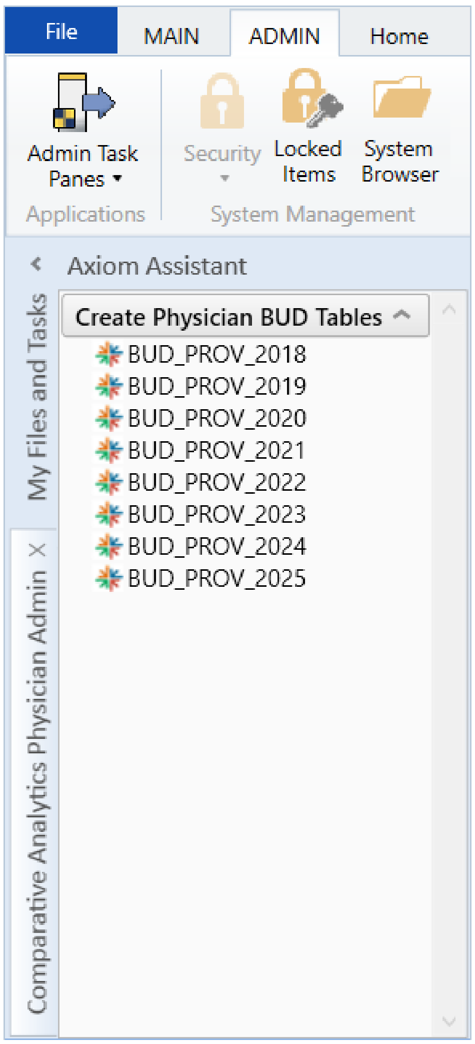
To perform this task, you must have the following roles: Management Reporting Admin, Management Reporting Physician, and Comparative Analytics Admin.

1. In the Windows Client, in the task ribbon, click **Admin**.
2. Click **Admin Task Panes**.
3. Click **Comparative Analytics Physician Admin**.



Comparative Analytics Physician Admin link (click to enlarge)

4. In the **Comparative Analytics Physician** task pane, double-click the table to create.



Create Physician BUD Tables task pane (click to enlarge)

4

Managing Users

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

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

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

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

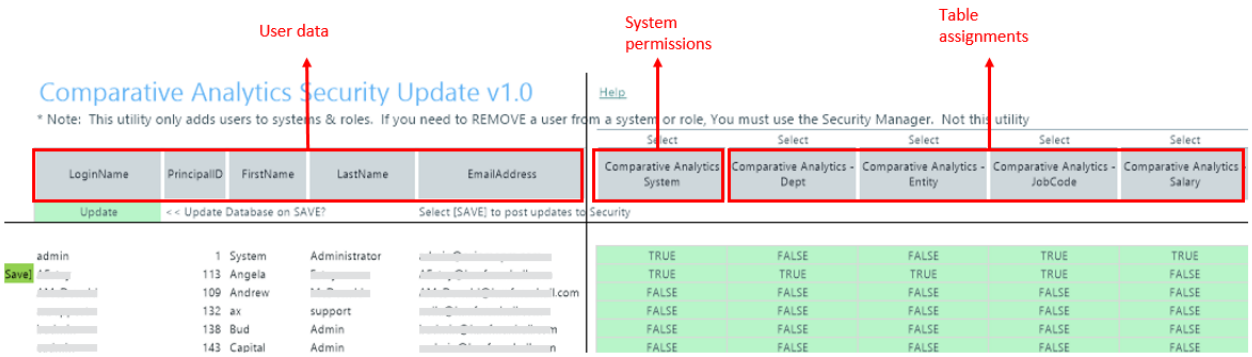
Using the Security Update utility to manage user access

Use the Comparative Analytics Security Update Utility to grant access and assign roles to Comparative Analytics users.

NOTE: You cannot add or remove users using this utility. You can do that only in the Security Manager utility.

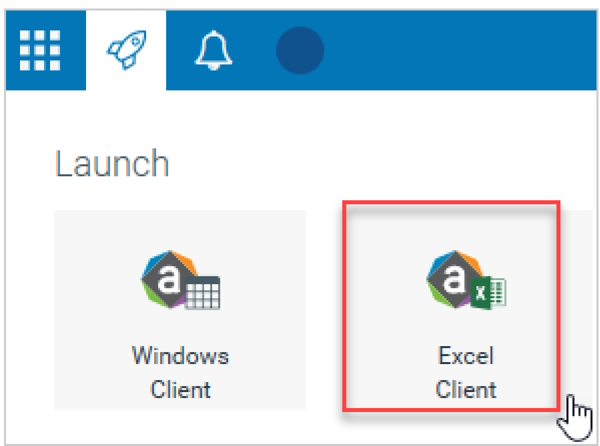
To manage table and filter access, use the Security Manager utility.

Use this utility to grant users access and assign roles in the same place. The following image shows the column categories:

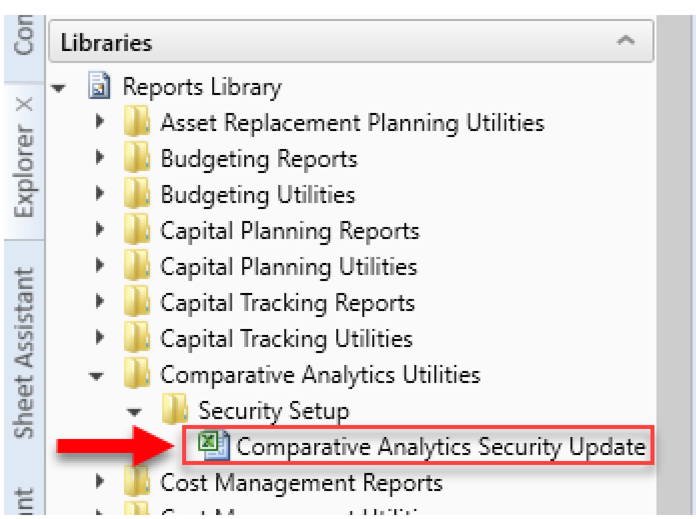


To open the Comparative Analytics Security Update Utility:

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



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

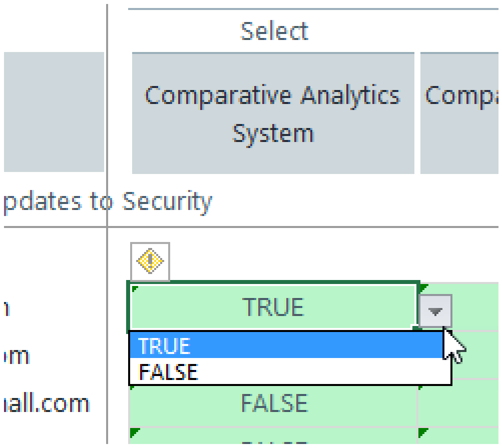


Granting access to Comparative Analytics

To grant users access to Comparative Analytics:

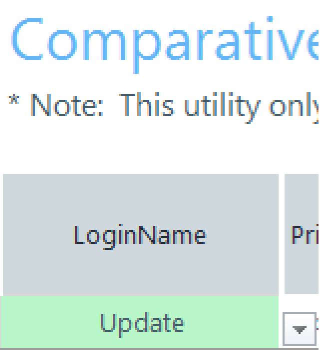
1. Click the cell in the **Comparative Analytics System** column corresponding to the user receiving access to activate the drop-down menu.

2. Click the arrow to open the drop-down menu and click **TRUE** to grant access to Comparative Analytics. A **FALSE** value would revoke access.



3. Click the user role cell(s) that apply to that user in the relevant user role assignment column and open the drop-down menu.

4. Before you save changes, make sure the green cell in the **LoginName** column indicates **Update**.



5. Click **Save**

Managing table and filter access for Comparative Analytics

1. Open Security Management.

2. Select the **Users** option button.

3. Select a user.

4. On the Tables tab, select a table type.
5. Select a security filter.

NOTE: The ComparativeAnalyticsDeptMetric table type filter applies to all department metric data.

The ComparativeAnalyticsJobCodeMetric table type filter applies to all job code metric data.

The ComparativeAnalyticsSalaryMetric table type filter applies to all salary metric data.

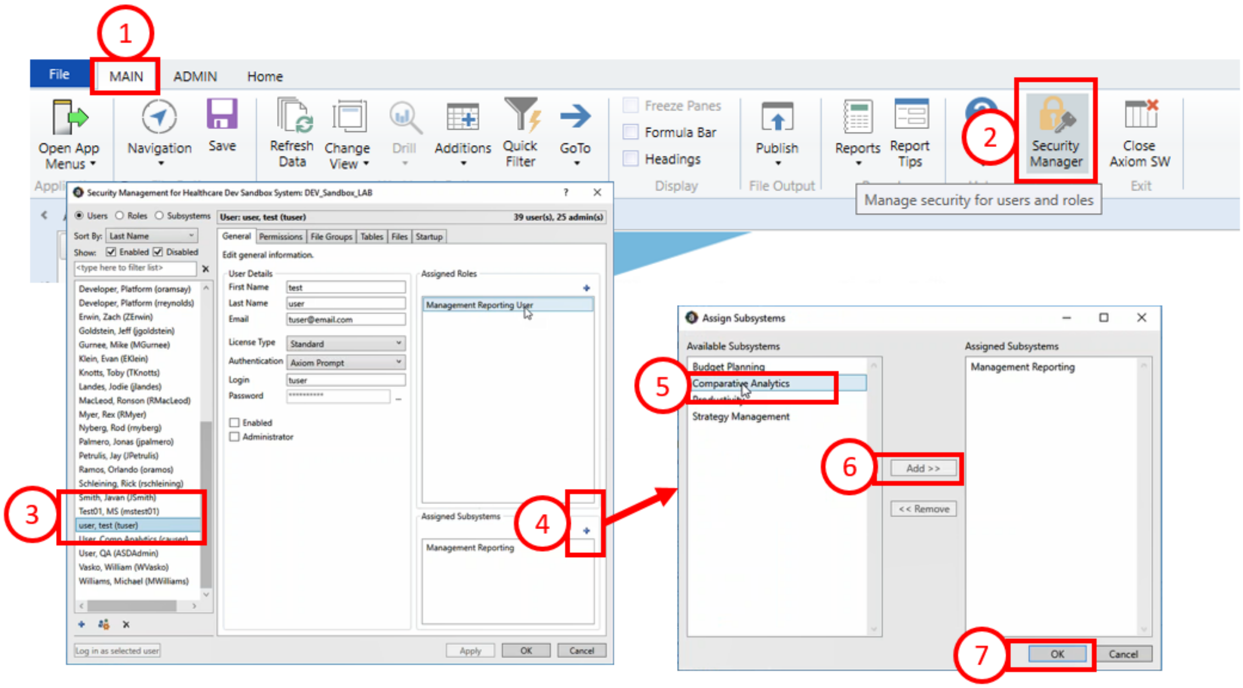
Using the Security Manager to manage user access

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

To assign users to the Axiom Comparative Analytics subsystem:

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

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



To unassign users from the Axiom Comparative Analytics subsystem:

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

Understanding Comparative Analytics user roles

Axiom Comparative Analytics uses user role assignments to determine a user's ability to view and modify specific data throughout the application dashboards.

▶ Role-based filter and data access

The table below defines the filter data that users have access to based on their role. You may have one or more roles assigned to you. To learn how to assign roles, see Using the Security Update utility to manage user access (page 1).

Axiom asset		Entity role	Dept role	Jobcode role	Salary role
Standard Axiom dashboards	Detailed Department Report		X		
	Metric Explorer	X	X		
Axiom Intelligence dashboards	Expense Improvement		X		
	Entity Performance	X			
	Data Explorer	X			
	Peer Explorer	X			
Data-only*	Jobcode/labor data measures			X	
	Salary rate measures				X

NOTE: Granting someone both the Entity and Dept roles will also grant access to Jobcode and Salary data according to the Dept-level filters assigned.

The Entity role also gives a users access to entity-level filters across all dashboards that they have access to. Likewise, the Dept role gives users access to dept-level filters across all dashboards that they have access to.

The Jobcode and Salary roles do not provide access to the dashboards themselves. As a result, these roles must be combined with other roles that provide dashboard access.

Security for Axiom Intelligence

Axiom Intelligence dashboards use security protocols that are different from those used by standard Axiom dashboards. As a result, the security setup for these roles is different. Please refer to the Axiom Intelligence security topics in this online help for general setup information.

Click each role below for Axiom Intelligence setup details specific to each role:

Dept role

There are no special Axiom Intelligence rules for this role unless the user requires a filter other than userid=owner, userid=reviewer, or userid=approver. In this case, you must enter custom filters in the AI tab of the Axiom Security Manager.

Entity role

For Axiom Intelligence access, entity filters must be set up in the AI tables for EntityMetric and EntityMetricPeerGroupPercentile tables.

Jobcode and Salary roles are not securable.

Administrative roles

Users with the Comparative Analytics Admin role can update peer group priority, request custom peer groups, load latest data sets, and update Axiom Intelligence data. However, users with only the Admin role cannot access dashboards. This role can be combined with other roles.

Users with the Peer Group Request role can create peer group requests, but this role does not give access to any other assets. To access other assets, this role needs to be combined with other access roles.

Suggested role assignments

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

Role within your organization	Entity role	Dept role	Jobcode role	Salary role	Admin role	Peer Group Request role
CFO or other users you want to have full access to all data.	X	X	X	X		
VP, Director, Manager or other users that should have access to department, labor, and salary rate data.		X	X	X		

Role within your organization	Entity role	Dept role	Jobcode role	Salary role	Admin role	Peer Group Request role
Manager or other users that should have access to department and labor data but **not** salary rates.		X	X			
Manager or other users that should have access to labor and salary rate data.			X	X		
Axiom System Administrator or other user with other Axiom product administration roles such as Budget Planning or Performance Reporting who maintains the Axiom software. Typically, on the Finance team.					X	X

Managing security for Axiom Intelligence reporting

Security for Axiom Intelligence reporting is controlled as follows:

- **File security** is controlled using the **Files** tab of security, just like any other report type in Axiom Comparative Analytics. Users can only see and open report files if they have at least read-only access, and they can edit only report files if they have read/write access. Additionally, any user with read/write access to a folder in the Reports Library (or access to My Documents) can create a new report file.

- **Data security** is controlled using the **AI Tables** tab of security. This is a special area of security that controls data access within Axiom Intelligence reports only. While users are viewing or editing Axiom Intelligence reports, their access to data is limited according to the permissions defined on the AI Tables tab. Table permissions defined on the **Tables** tab do *not* affect data access in Axiom Intelligence reports.

Any permission changes made to the AI Tables tab do not take effect immediately. Security changes must be synchronized before they apply to the static data set used by Axiom Intelligence reporting.

How Axiom Intelligence security permissions work

To define security for Axiom Intelligence data, you can grant full or filtered access on a per table basis, for the tables used in the Axiom Intelligence model. This security is applied only when users are viewing data within Axiom Intelligence reports.

Security permissions for Axiom Intelligence data are not configured in the same way as table permissions set on the **Tables** tab. For example:

- Data access in Axiom Intelligence reports is always read-only. Axiom Intelligence reports do not support saving data. "Full access" in this context does not mean read/write access; it means the user is eligible to view all eligible data for the table within Axiom Intelligence reports.
- Table types cannot be used when configuring security for Axiom Intelligence data. Security is set at the table level only.
- The permissions set on the **AI Tables** tab have no impact on the permissions set on the **Tables** tab, and vice versa. For example, a user can have full access to a table within Axiom Comparative Analytics (via the Tables tab), but no access to the same table within Axiom Intelligence reports (via the AI Tables tab).

Additionally, the configuration of the Axiom Intelligence model impacts the way that Axiom Intelligence security permissions are applied to tables. Generally speaking, product-delivered models are configured as follows:

- Tables with lookup relationships are configured to have dependent security in Axiom Intelligence reporting. This means that if a table has a lookup to a reference table, any AI security filters defined on the lookup reference table apply to both tables.

  For example, imagine that you have a table named Encounter with a lookup to the Entity table. If the Entity table has an AI filter defined of Entity=3000, this filter also applies to the Encounter table. This is different from regular Axiom Comparative Analytics table security, where filters defined on lookup reference tables apply only when the lookup reference table is the primary table for the query.

- Models are configured so that AI security can be set on only specific important reference tables. This security is then inherited by other tables that look up to these securable tables. This simplifies the security setup and allows full use of business intelligence features within reports.

- If a table in the model is not flagged as securable, and does not look up to a securable table, then all users have access to the data in that table within Axiom Intelligence reports. This should be reserved for supporting tables that do not contain financial data or other sensitive data.

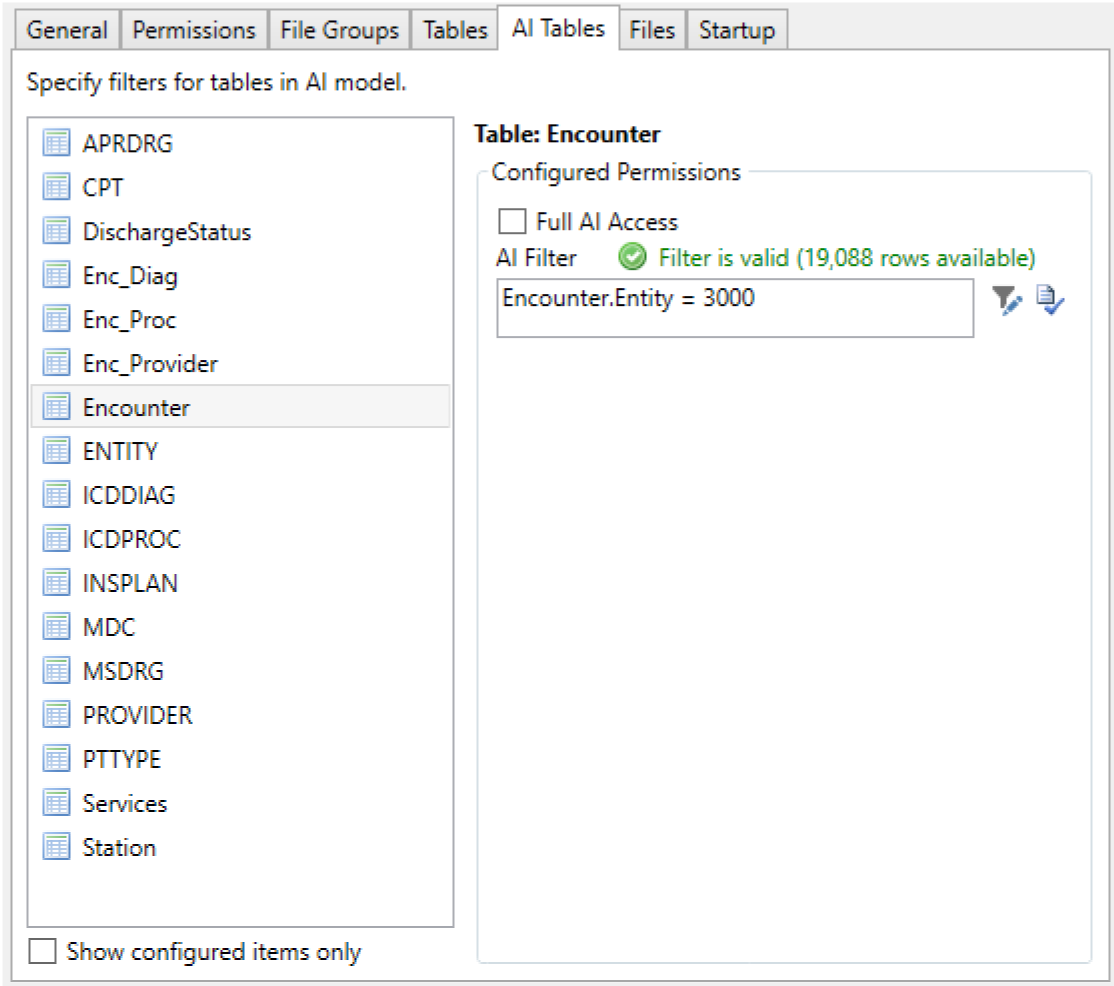
Role inheritance and subsystem restrictions work as normal for Axiom Intelligence data permissions.

Configuring security for Axiom Intelligence data

Access to data in Axiom Intelligence reports is controlled using the **AI Tables** tab. You can configure permissions at the user and/or role level. If subsystems are used, the subsystem must also configure permissions on this tab, to define the boundary of allowed permissions for users in that subsystem.

The left side of the tab lists the tables that have been flagged as "securable" in the Axiom Intelligence data model. As discussed in the previous section, product-delivered models are typically configured so that only important reference tables are configured as securable. Any security defined on these reference tables applies to the reference table itself, and any tables that look up to the reference table.

When you select a table in the list, you can configure the security settings for the user or role within the **Configured Permissions** section in the right side of the tab.



Example AI Tables tab

For each table, you can grant full or filtered access to its data as follows:

Item	Description
Full AI Access	Selecting this option means the user is eligible to view all data in this table, within Axiom Intelligence reports. If this option is enabled, the **AI Filter** box is hidden because it no longer applies.
AI Filter	Defining a filter means the user is eligible to view all data in the table that meets the filter, within Axiom Intelligence reports. To define a filter, type the filter into the **Filter** box, or use the Filter Wizard . After defining a filter, you can validate the filter syntax by clicking the **Validate filter** button .

As discussed in the previous section, the user's eligibility to view data from a table may be further impacted by the security permissions set on tables with lookup relationships. For example, a user might have **Full AI Access** enabled for the Dept table, but if that table looks up to another securable table, then the ability to view data in the Dept table is also impacted by the user's permissions on the lookup reference table.

If neither option is configured, then the user has no access to data in the table, within Axiom Intelligence reports.

▶ Synchronizing security updates

When the Axiom Intelligence model and data are initially synchronized, the current security settings as defined on the **AI Tables** tab are applied as well. If any changes are made in Axiom Comparative Analytics security that impact access to Axiom Intelligence data, these changes must be synchronized or else they will not take effect in Axiom Intelligence reports.

The following types of security changes affect Axiom Intelligence reporting:

- Any changes to the AI Tables tab, for any user, role, or subsystem
- Adding a user to a role or a subsystem, if the role or subsystem has defined permissions on the AI Tables tab
- Removing a user from a role or a subsystem, if the role or subsystem has defined permissions on the AI Tables tab

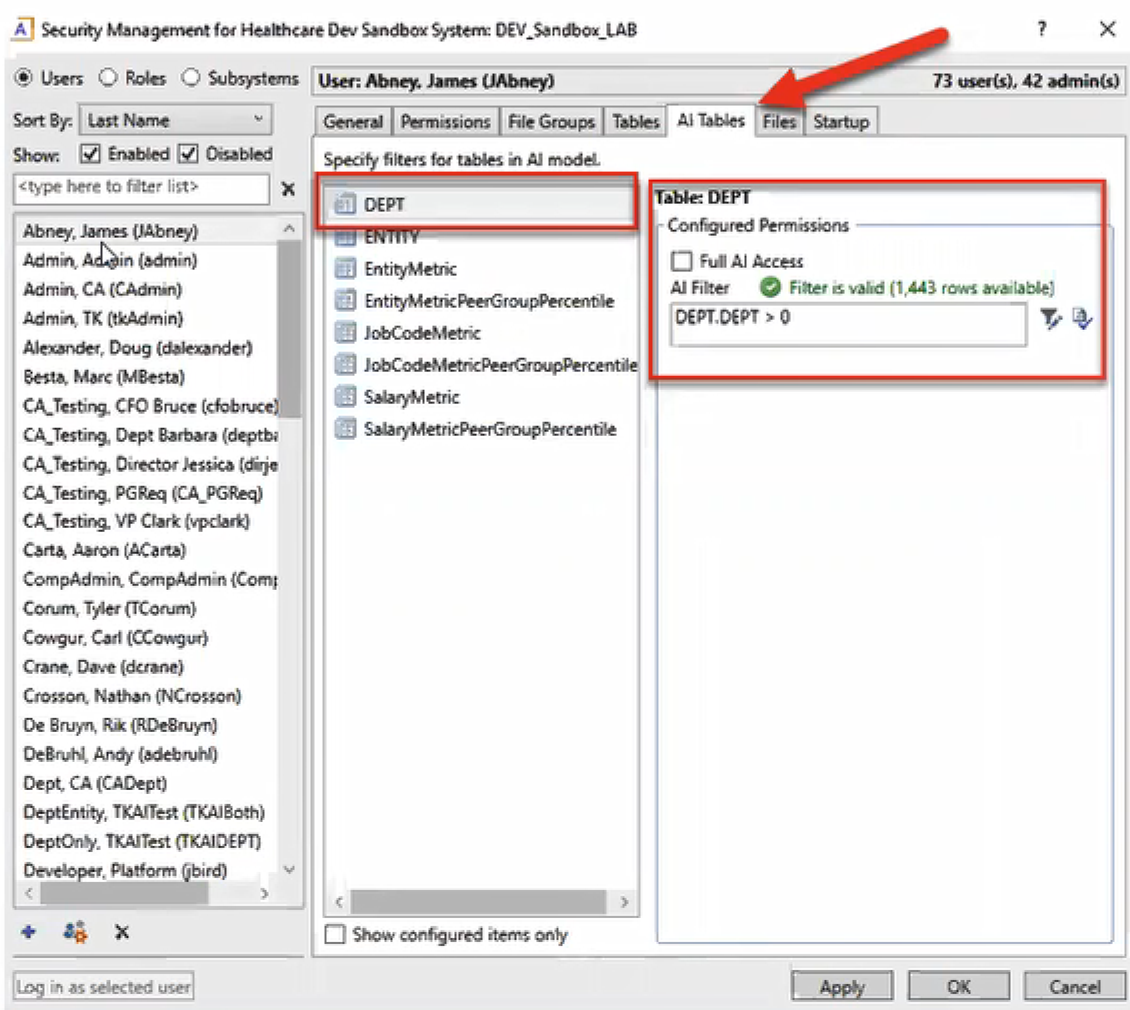
When you save security settings in the Security Manager dialog, or using Open Security in Spreadsheet, or using a Save Type 4 report, the security settings are automatically synchronized with Axiom Intelligence reporting. This means that saving security may take longer in systems with Axiom Intelligence reporting enabled.

Managing user access to Axiom Intelligence

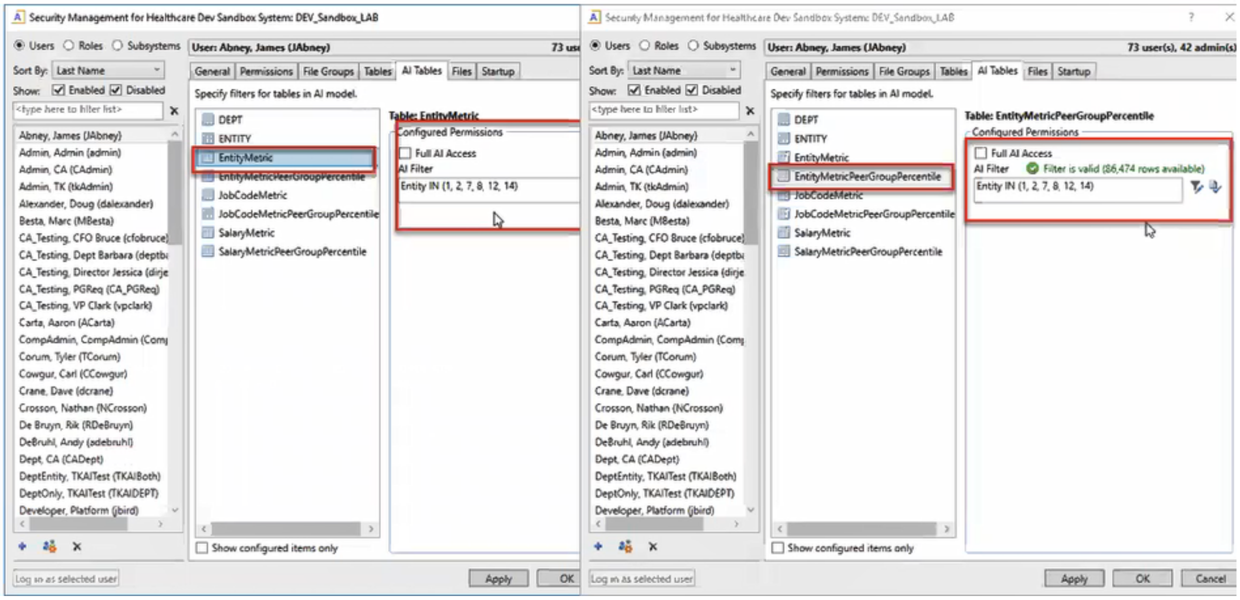
Managing user access to Axiom Intelligence assets may require manual adjustments to Department or Entity filters at the user level. The Entity Performance, Expense Improvement, Data Explorer, and Peer Explorer dashboards are all Axiom Intelligence assets.

Use the Security Manager to set filters for Axiom Intelligence tables. If a user has only the DEPT role and the Dept.Owner/Dept.Reviewer/Dept.Approver works for the user, there is nothing more to do. The user will see only those departments where their userID appears in dimensions. The same is true if a user has the Dept role as well as the Jobcode and Salary role.

If a user needs more departments than Dept.Owner/Dept.Reviewer/Dept.Approver provides and has only the Dept role and Salary role, you must update the DEPT table filter in the AI Tables tab for each user.



Users with an Entity role, need filters to be set for the Axiom Intelligence tables. To set these filters, on the **AI Tables** tab of the Security Manager, update the EntityMetric and EntityMetricPeerGroupPercentile table filters.



▶ Expense Improvement Opportunity Dashboard

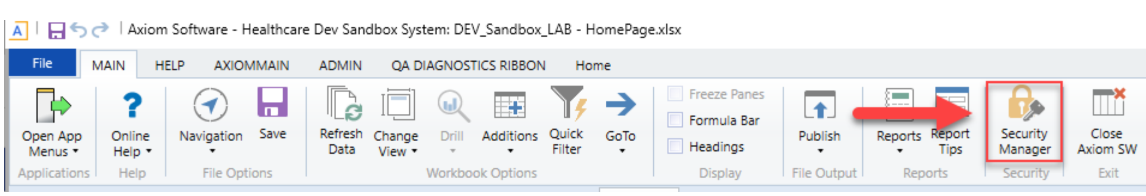
Users must have, at least, the Comparative Analytics Department role to access the Expense Improvement Opportunity Dashboard. This dashboard provides several different levels of reporting that include both entity and department data. Specifically, Executive and Enterprise level reports provide entity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

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

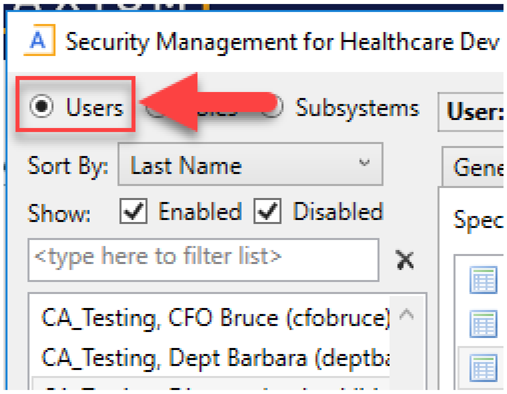
> **NOTE:** The default department filter is DEPT.Approver = '{CurrentUser.LoginName}' OR DEPT.Owner = '{CurrentUser.LoginName}' OR DEPT.Reviewer = '{CurrentUser.LoginName}'.

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

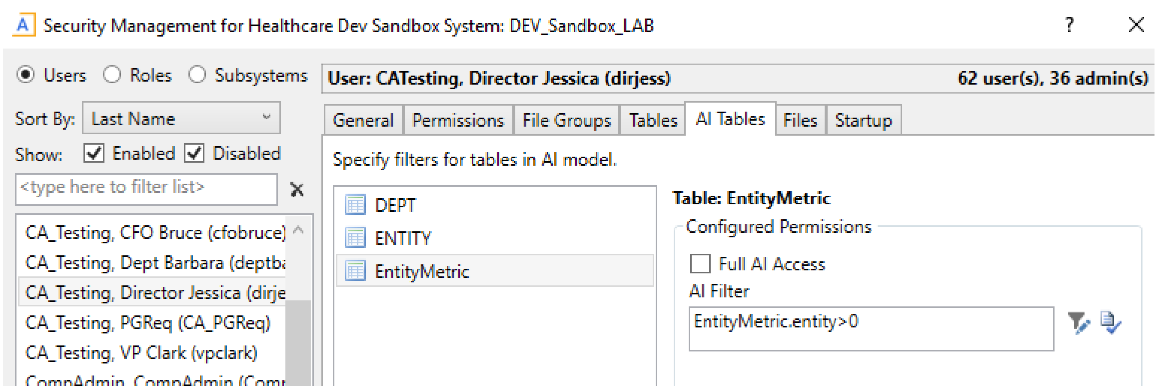
1. In the Windows Client, in the **Main** ribbon, click **Security Manager**.



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



3. In the user list, click the name of the user whose filter you are editing.
4. Click the **AI Tables** tab.
5. Click **EntityMetric**.
6. In the **AI Filter** text box, type: **EntityMetric.entity>0**.



7. Click **OK**.

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

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

5

Managing Data for Axiom Intelligence Reporting

Axiom Intelligence reports use a subset of Axiom Comparative Analytics data that has been selected to support the most useful data analytics. This data set is static to provide optimal query performance while exploring your data, but the data set can be refreshed as needed with the latest data.

▶ Defining the available data

The data available to Axiom Intelligence reports is determined by the data *model*. This model is predefined and provided by the product package installation.

The data model is designed to provide access to the data that is deemed most useful to analytical reporting, based on the data structures used by the product. The data model determines the fields that are available for use in Axiom Intelligence reports. Some fields may directly correspond to tables and columns in Axiom Comparative Analytics, while others may represent transformations or calculations of table data. See your product documentation for more information on the data included in the model.

Currently, data models cannot be customized to include additional fields or to remove existing fields.

▶ Refreshing the available data

When you install a product package that includes an Axiom Intelligence data model, the model and its data are made available to Axiom Intelligence reporting. This creates the initial data set used for reporting. If any changes are made to the data in Axiom Comparative Analytics after the package installation, this data is not available to Axiom Intelligence reporting until the data is synchronized.

Axiom Comparative Analytics uses a Scheduler event handler named **System.ProcessBITable** to synchronize data for Axiom Intelligence reporting. This event can synchronize all data, or synchronize data for a specific table—for example, if the table has just been modified. This event can be run using a Raise Event Scheduler task or using a RunEvent command or function. The reserved variable name **Table** can be used to pass in an optional table name.

The Axiom product that provided the data model will also provide a built-in methodology to trigger this event handler and synchronize the data. The product may be designed to synchronize data after specific activities are performed in the software (such as after running an import or a particular data utility), and/or it may be designed to synchronize data at regular intervals using a scheduled job. The product may also provide a way for you to manually trigger the data synchronization as needed from an Axiom form or from a custom task pane. See Updating Axiom Intelligence data for information on how to do this in Comparative Analytics.

About Axiom Intelligence reporting

Using Axiom Intelligence reporting, you can visually explore your Axiom Comparative Analytics data. Axiom Intelligence reports display data using a variety of interactive data visualization tools, such as charts, tables, maps, matrices, and KPIs. You can easily filter and drill this data to gain insights into your organization.

Axiom Intelligence reports can be created, viewed, and edited from the Report Designer in the Web Client. Axiom Intelligence reports are stored in the Reports Library just like other reports.

> **NOTE:** Axiom Intelligence reporting is a cloud-based feature that is available only in Axiom Cloud Service systems. Axiom Intelligence reports rely on an engineered data model and specifically licensed features, which are available only in conjunction with certain Axiom Software products. If you currently license Axiom Comparative Analytics industry-specific products, please review your Product Release Notes for details regarding the availability of Axiom Intelligence reporting. Alternatively, if you would like to independently use Microsoft PowerBI to query your existing Axiom Comparative Analytics data set, please refer to this article to instruct your information technology professionals to establish an OData connection.

▶ Architecture of Axiom Intelligence reporting

The Axiom Intelligence reporting solution leverages Microsoft Power BI to provide access to industry-leading business intelligence reporting. The Axiom Cloud Service provides the necessary infrastructure to support using Power BI as part of your Axiom Comparative Analytics system.

Axiom Intelligence reporting requires a defined data *model* that specifies the Axiom Comparative Analytics data to be available in reports. This model is provided by your Axiom Comparative Analytics product installation, and is designed to provide access to the most useful data for business intelligence reporting. All data within the model can be used in Axiom Intelligence reports. Currently, Axiom Comparative Analytics does not support modifying the provided model or creating additional custom models.

The model data is cached for access in Axiom Intelligence reports, to provide optimal performance as you explore the data. If changes are made to the data in Axiom Comparative Analytics, the data must be synchronized in order to update the data available to Axiom Intelligence reports. This synchronization can occur on demand, or at scheduled intervals, or in response to certain triggering events. For more information, see Managing data for Axiom Intelligence reporting.

Creating and accessing Axiom Intelligence reports

Axiom Intelligence reports are created in Axiom Comparative Analytics using an embedded Microsoft Power BI editor. You can create a new report and launch this editor using the Report Designer in the Web Client. For more information, see Creating Axiom Intelligence reports.

The data source shown in the report editor is the Axiom Comparative Analytics data defined in the product model. You can use this data in a wide array of Power BI visualizations, and set up various interactivity options for the report, such as filtering and drilling. For more information, see Using the Axiom Intelligence report editor.

End users can view Axiom Intelligence reports using the Web Client browser. In the Web Client, Axiom Intelligence reports can be accessed as follows:

- Using the Report Designer page
- Using the Navigation panel in the Web Client Task Bar
- Using links within a form home page (or within other forms and web reports)

Axiom Intelligence reports are also visible in the Desktop Client in the Reports Library. When an Axiom Intelligence report is launched from that location, it opens in the Web Client browser. For more information, see Viewing Axiom Intelligence reports.

Axiom Intelligence reports use the ABI file type, and are distinguished from other types of reports using a special icon .

Security considerations

Security for Axiom Intelligence reporting is controlled as follows:

- **File security** is controlled using the **Files** tab of security, just like any other report type in Axiom Comparative Analytics. Users can only see and open report files if they have at least read-only access, and they can edit only report files if they have read/write access. Additionally, any user with read/write access to a folder in the Reports Library (or access to My Documents) can create a new report file.

- **Data security** is controlled using the **AI Tables** tab of security. This is a special area of security that controls data access within Axiom Intelligence reports only. While users are viewing or editing Axiom Intelligence reports, their access to data is limited according to the permissions defined on the AI Tables tab. Table permissions defined on the **Tables** tab do *not* affect data access in Axiom Intelligence reports.

Data security for Axiom Intelligence reports is cached along with the report data. If any changes are made to security that impact access to Axiom Intelligence data, the model must be synchronized in order for the changes to take effect. This synchronization happens automatically when saving changes to security settings. For more information, see Managing security for Axiom Intelligence reporting.

Viewing Axiom Intelligence reports

In the Report Designer, you can browse all of the Axiom Intelligence reports that are available to you, and open them to view report data using business intelligence tools and visualizations. In order to open an Axiom Intelligence report, you must have at least read-only access to the report, as defined in Axiom Comparative Analytics security. Axiom Intelligence reports can be opened from either the Web Client or the Desktop Client.

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

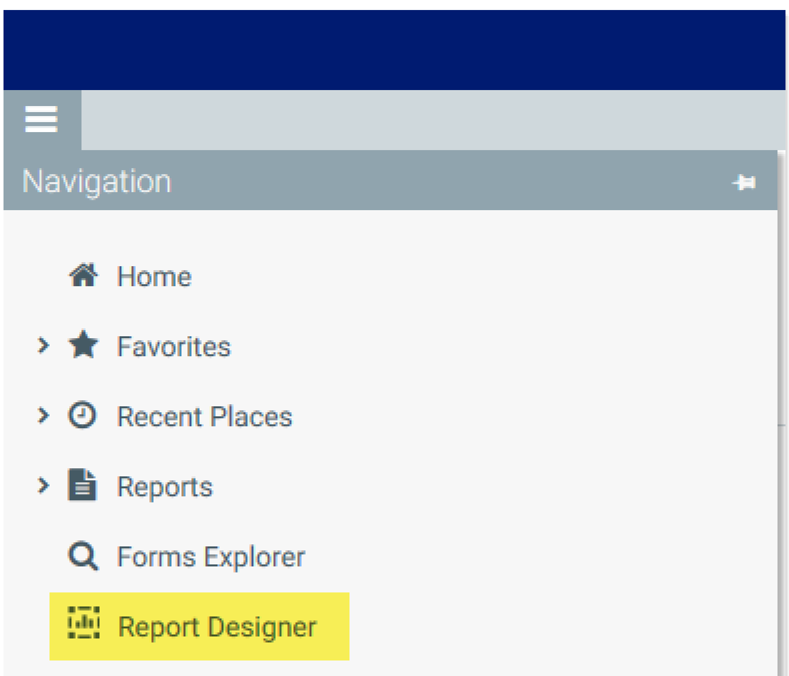
- Using the Navigation panel in the Web Client
- Using links within your home page or other files
- Using links within a task pane or ribbon tab in the Desktop Client

▶ Opening an Axiom Intelligence report using the Web Client

You can open Axiom Intelligence reports using the Report Designer page in the Web Client.

To access the Report Designer page:

- Click the menu icon ☰ in the left side of the Task Bar to open the Navigation panel. Then, select **Report Designer**.

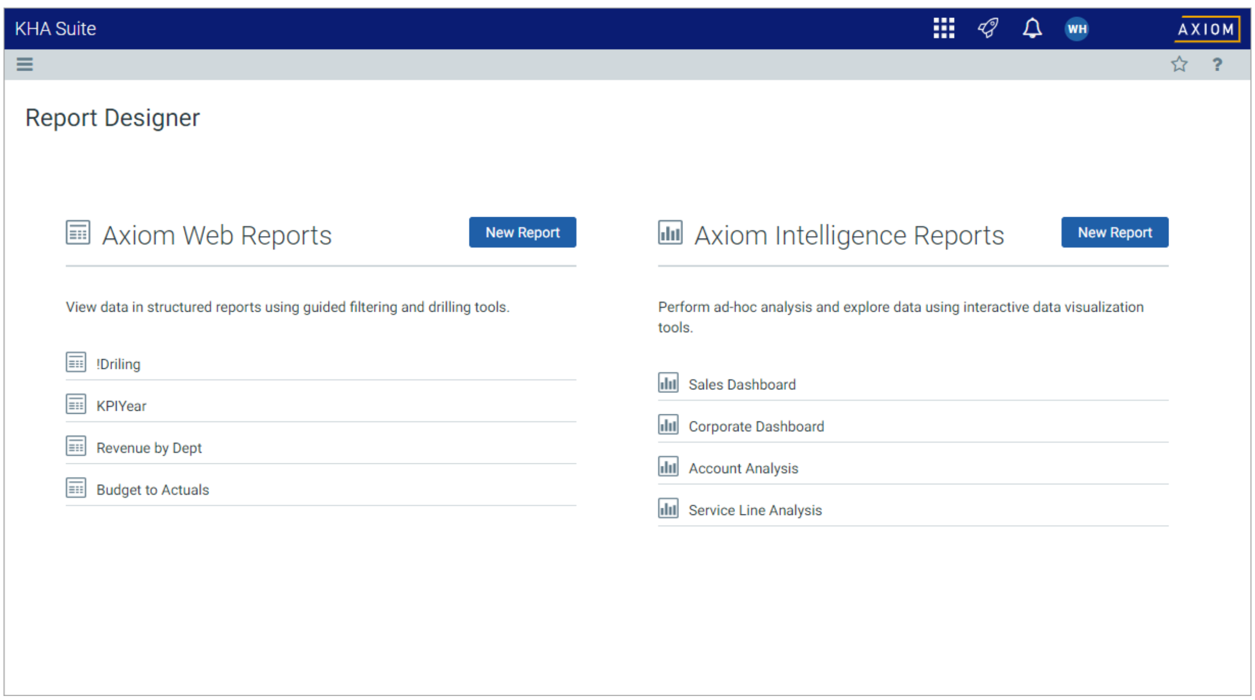


NOTE: If you do not see the Report Designer in the Navigation panel, this may mean that your organization's Navigation panel has not been updated (or that your organization has customized the panel to exclude it).

Alternatively, you can go to directly to the Report Designer page as follows:

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

All of the Axiom Intelligence reports that you have permission to access are listed underneath the **Axiom Intelligence Reports** header. To open a report, click it.



Example Report Designer page

Reports are displayed in last-modified order, with the most recently created or modified reports on top. You can hover your cursor over a report to see when the report was last modified and by whom.

▶ Opening an Axiom Intelligence report using the Desktop Client

You can open Axiom Intelligence reports from the Reports Library in the Desktop Client (Excel Client or Windows Client). You can differentiate Axiom Intelligence reports from other types of Axiom Comparative Analytics reports using the following icons:

	Axiom form
	Axiom Intelligence report
	Web report
	Spreadsheet Axiom file

To open an Axiom Intelligence report:

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 report that you want to open, and then click it.

The Axiom Intelligence report opens in the Web Client using your default browser.

▶ Viewing data in an Axiom Intelligence report

When you open an Axiom Intelligence report, it displays a configured set of Axiom Comparative Analytics data using *visualizations*. Visualizations are items such as charts, tables, maps, matrices, and KPIs. The report may contain other visual elements for navigation, drilling, and filtering.

Depending on the report configuration, you can explore and filter the data using features such as:

- **Filtering**: Data can be filtered in various ways.
    - You can use the **Filters** panel on the right of the screen to filter the entire report, the current report page, or the currently selected visualization.
    - Selecting a field in a visualization can filter other visualizations that use the same field.
    - The report may contain drop-down lists, slicers, or other visual elements that can be used to filter data.

- **Drilling**: Visualizations can be associated with hierarchies, so that you can drill down the hierarchy to see the visualization data at different levels.
- **Bookmarks**: You can use bookmarks to view designated areas of interest and apply predefined filters. Click the **Show Report Bookmarks** icon to show the Bookmarks panel, and then select from defined bookmarks (if present).

For more information on what you can do when viewing a report, see the Power BI documentation.

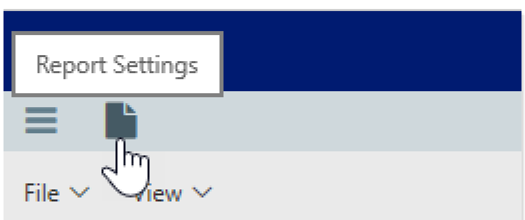
> **NOTE:** Data in Axiom Intelligence reports is not live. Recent changes to Axiom Comparative Analytics data may not be available in Axiom Intelligence reports if the data has not been synchronized. For more information on how Axiom Intelligence data is managed, see Managing data for Axiom Intelligence reporting.

Changing the color theme for an Axiom Intelligence report

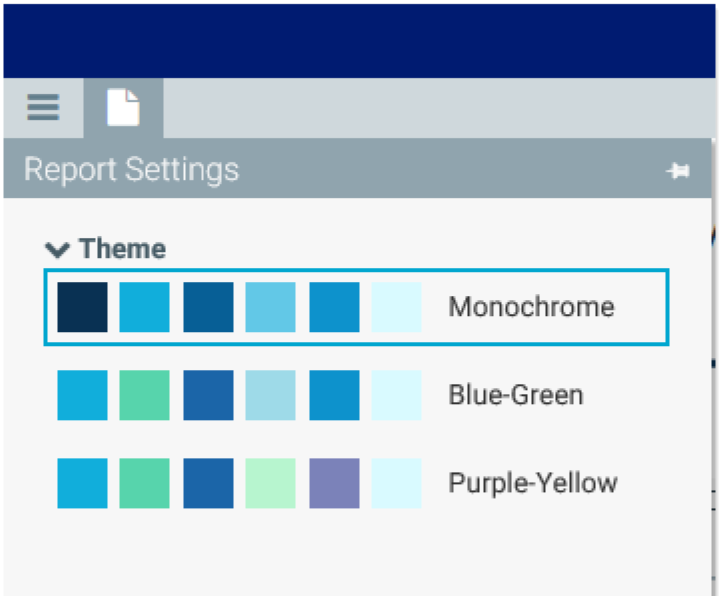
Axiom Intelligence reports use a specified color theme in visualizations and other report elements. When viewing an Axiom Intelligence report, you can change the color scheme as needed. Changing the color scheme to use a different set of colors may make it easier to review certain visualizations.

When an Axiom Intelligence report is open in viewing mode, any color scheme changes apply to only the current report session. If you want to change the default color scheme for the report, you must make the change in the report editor and save the report.

1. Click the **Report Settings** icon in the Web Client Task Bar.



2. In the Report Settings panel, select the desired theme.



The report updates to use the specified theme.

Updating Axiom Intelligence data in Comparative Analytics

Axiom Comparative Analytics automatically updates Axiom Intelligence data nightly. However, there may be instances when administrators need to update that data more frequently. For example, when you make changes to department dimension assignments, peer group priority, or loaded data on any other day than the 23rd.

To force an update of Axiom Intelligence data:

1. Navigate to the Axiom Comparative Analytics home page.
2. Click **Axiom Intelligence Data Update**.

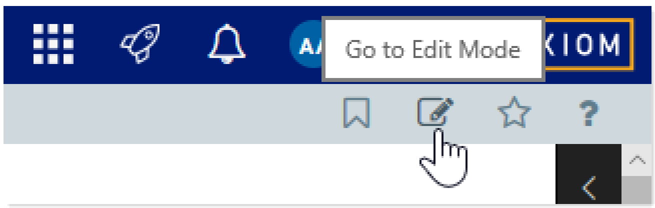
Using the Axiom Intelligence report editor

Using the Axiom Intelligence report editor, you can add visualizations and other elements to your report, and define the data shown in each visualization.

Axiom Intelligence reports leverage Microsoft Power BI to provide access to industry-leading business intelligence reporting. This topic provides a brief overview of the features available when creating reports. For more information on using visualizations, filters, and other features in the report editor, see the Power BI documentation.

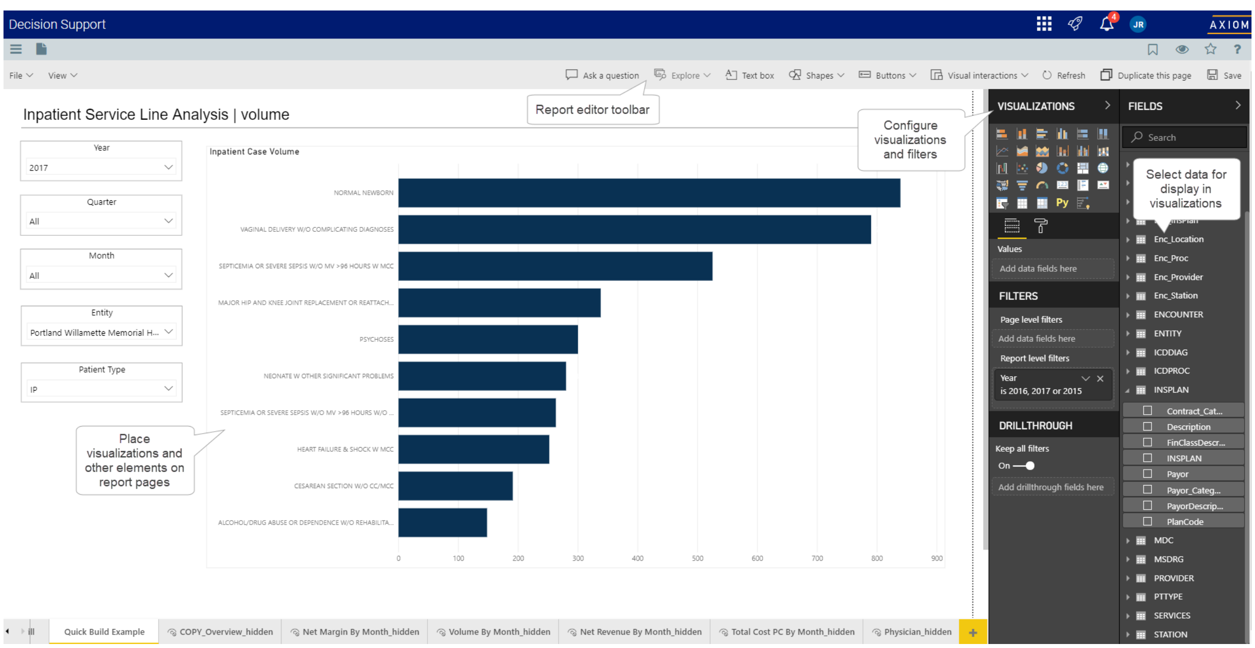
The Axiom Intelligence report editor is available as follows:

- When you create a new Axiom Intelligence report, the new report is automatically opened in the editor.
- When viewing an existing Axiom Intelligence report, you can switch to edit mode. Open the report that you want to edit, then click the edit icon in the Task Bar.



Report editor overview

The Axiom Intelligence report editor uses Microsoft Power BI technology embedded within Axiom Comparative Analytics. When you open an Axiom Intelligence report in edit mode, a third toolbar becomes available to provide access to report editing features. The panels on the right side of the editor provide access to visualizations and your Axiom Comparative Analytics data.



Example Axiom Intelligence report editor

To create the report, you can add data visualizations and other report elements to the report canvas. You can move items by dragging and dropping them to different areas of the canvas, and you can resize items by clicking and dragging the frame handles.

Axiom Intelligence reports can have multiple pages. To add new pages or delete pages, use the page controls at the bottom of the editor. To configure display options for the report and its pages, use the **View** menu.

▶ Fields and visualizations

The **Fields** panel on the right side of the editor displays the available Axiom Comparative Analytics data for the report. The data available to Axiom Intelligence reports is determined by your Axiom Intelligence model, which is provided as part of the product installation. Currently, the model cannot be modified.

The available fields are based on the table data in your Axiom Comparative Analytics system. Some fields may directly correspond to tables and columns in Axiom Comparative Analytics, while others may represent transformations or calculations of table data. See your product documentation for more information on the data included in the model.

NOTE: The Fields panel shows all data fields used by the model, regardless of whether the current user has access to data in that field (as defined by that user's permissions on the **AI Tables** tab in security). When a field is used in the report, the data resulting from that field depends on the user's security permissions.

Axiom Comparative Analytics data can be viewed in the report using visualizations. You can create and configure visualizations using the **Visualizations** panel on the right side of the editor. Each visualization is a different way to display data, including various chart types, tables, maps, matrices, cards, and KPIs.

You can create new visualizations in any of the following ways:

- Click in an empty area of the report (so that nothing is selected), then select a visualization. The selected visualization is added to the report. You can then add data to the visualization by selecting fields in the Fields panel.
- Click in an empty area of the report (so that nothing is selected), then select a field from the Fields panel. A visualization is automatically added to the report, displaying data from the selected field. You can then change the visualization type by selecting a different visualization, and add more fields to the visualization.
- Drag and drop a field from the Fields panel to a blank area of the report. A visualization is automatically added to the report, displaying data from the field. You can then change the visualization type by selecting a different visualization, and add more fields to the visualization.

Once a visualization has been added to the report, you can further configure it by using the **Fields**, **Format**, and **Analytics** tools within the Visualizations panel. The available options depend on the visualization type.

For more information on using visualizations, see the Power BI documentation.

NOTE: Data in Axiom Intelligence reports is not live. Recent changes to Axiom Comparative Analytics data may not be available in Axiom Intelligence reports if the data has not been synchronized. For more information on how Axiom Intelligence data is managed, see Managing data for Axiom Intelligence reporting.

Filters

There are several different levels of filters available in Axiom Intelligence reports to filter data. Filters can be set in the **Filters** section of the **Visualization** panel.

- **Visual level filters** apply to specific visualizations in the report. Select the visualization in the report that you want to filter, then configure the filters. By default, all fields that are currently used in the visualization are available for filtering. If you want to filter by a field that is not displayed in the visualization, you can drag and drop the field to this area.
- **Page level filters** apply to all visualizations on the current report page. Go to the page that you want to filter, then drag and drop fields to this area in order to filter by those fields.
- **Report level filters** apply to all visualizations in the report. Drag and drop fields to this area in order to filter by those fields.

When viewing the report, end users can interact with these filters to change the data shown in the report.

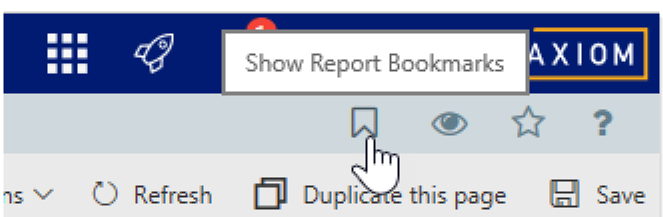
For more information on using filters, see the Power BI documentation.

Bookmarks

You can create bookmarks within the report in order to:

- Direct end users to certain pages or visualizations within the report
- Save pre-set filter configurations

To work with bookmarks, click the **Show Report Bookmarks** icon  in the Web Client Task Bar .



The Bookmarks panel opens on the right side of the editor. You can configure the report, and then use this panel to save that configuration as a bookmark. When end users view the report, they can select bookmarks to load the saved configurations. For more information on using bookmarks, see the Power BI documentation.

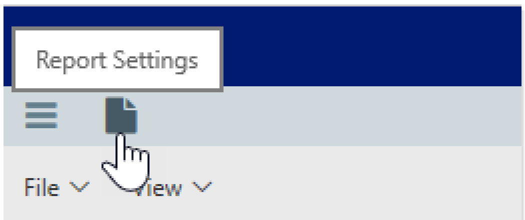
▶ Report settings

Using the **Report Settings** panel, you can configure various general settings for an Axiom Intelligence report, such as:

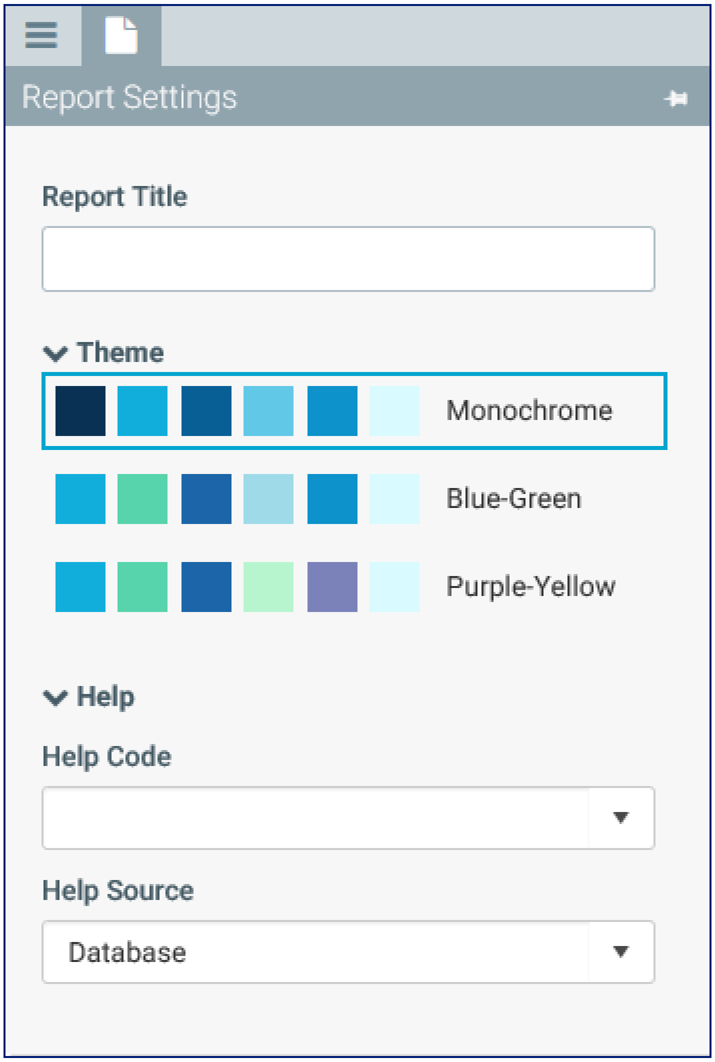
- An optional report title to display in the browser tab
- The color theme to apply to the report

To configure report settings:

1. Click the **Report Settings** icon in the Web Client Task Bar.



2. In the Report Settings panel, complete the settings as needed.



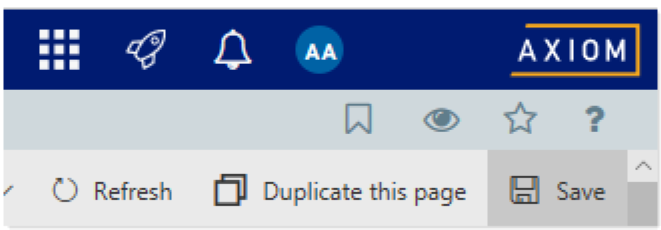
The following settings are available:

Item	Description
Report Title	Optional. Defines alternate title text to display in the browser tab instead of the full file name. By default, the file name is used as the report title.
Theme	Specifies the color theme to apply to the report. The theme affects colors used in visualizations and other report elements. The color theme can also be changed when viewing the report, to change the colors used in the current session only.

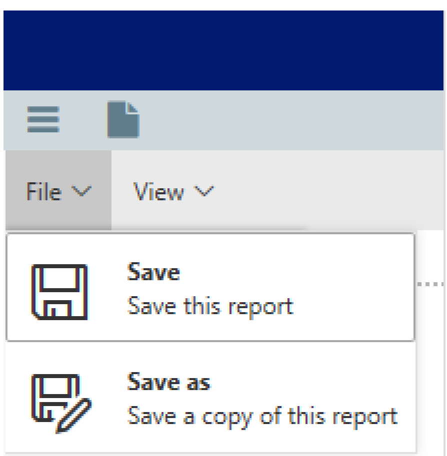
Item	Description
Help Code	Optional. Associates the report with a custom help code, to provide report-specific help. Clients can select any help code as defined in the Custom Help Admin area. Reports installed by a product package may use a help code from the product help file.
Help Source	By default, this is set to **Database** and should be left as is for client use. Reports installed by a product package may use the **Product** help source in order to display help from the applicable product help file.

Previewing and saving the report

At any time, you can save the current report configuration by clicking **Save** at the top right of the report editor toolbar.

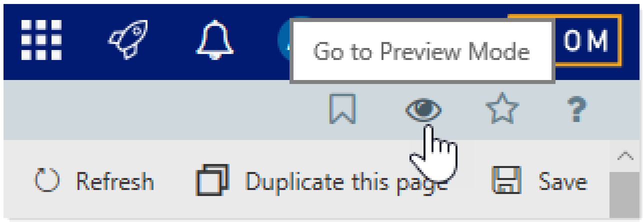


If you want to save a copy of the report, click **File > Save as** at the top left of the report editor toolbar. You can also save the current report using this menu.

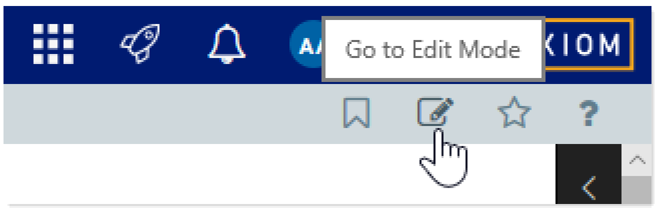


If you want to see how end users can interact with the report, you can use the preview feature.

- To preview the report, click **Go to Preview Mode** at the top right of the task bar. This automatically saves the report, and then opens it in viewer mode. You can then test the end user experience as needed.



- To return to the editor and make further changes, click **Go to Edit Mode** at the top right of the task bar.



When you navigate away from the report or close the browser tab, you are prompted to save the report as follows:

- If you have not saved the report since entering edit mode, you are prompted to save.
- If you have saved the report once during the current edit session, you are not prompted to save.
- Each time you switch from edit mode to preview, then back to edit mode, the save prompt is reset and is displayed again if you do not save.