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This axiUm QuickStart Guide will help you start using axiUm. It shows you how to:

- Follow document conventions.
- Familiarize yourself with the axiUm interface and its behavior
- Understand the different axiUm modules.

The examples in the axiUm User Guide show system-required field entries and may not reflect field entries typical of your institution. Check with your institution for a list of fields required to be completed before saving the current window. axiUm will not let you save your entries until all system-required entries are completed. If you try saving a window with incomplete system-required fields, a message box displays. When you close the message box, the cursor will be placed on the first system-required field that you missed. Once all system-required fields are entered, you can save and close the window.

Also note that default displays, tabs in windows, and other screen elements shown in the axiUm User Guide may look different from your axiUm setup.

### Document Conventions

This manual uses the following styles to identify the different interface elements:

<table>
<thead>
<tr>
<th><strong>Bold</strong></th>
<th>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italics</strong></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td><strong>Monospace Fonts</strong></td>
<td>Data entered by the user.</td>
</tr>
</tbody>
</table>
### Document Icons

This guide also uses the following icons to identify the different document elements:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✍️</td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Important information or steps you must take. For example, if you do not complete this step you may be unable to complete a task later on.</td>
</tr>
<tr>
<td>💡</td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.</td>
</tr>
<tr>
<td>🍏</td>
<td>Challenges and extra steps. For example, steps that take you beyond the basic procedures.</td>
</tr>
</tbody>
</table>
Starting axiUm

This chapter describes how to open the axiUm application.

1 Starting axiUm

There are two ways to start the axiUm application:

• Double-click  (axiUm desktop icon).
• From the Windows Start menu, select All Programs, browse to the axiUm folder, and select  (axiUm application icon).

axiUm displays the User Authentication window.

Now you can log onto the system. For information about logging on, see Logging on on page 3.
When you open axiUm, the User Authentication window appears. This chapter describes how to log onto axiUm.

If you are an administrator, you must assign each user a unique login ID and password.

1 Logging on

▼To log onto axiUm:

1. Open the axiUm application.
   
   For instructions on opening the axiUm application, see *Starting axiUm on page 1.*
   
   axiUm displays the User Authentication window.

2. In the **Id** field, enter your login ID.
3. In the **Password** field, enter your password.
4. Click **OK**.

   If you have a swipe card, you can swipe your swipe card instead of entering the Id field and Password field.
axiUm displays the application screen. Your first initial and last name appears on the taskbar.

You have successfully logged in and are ready to begin using axiUm.
You are now ready to familiarize yourself with axiUm’s windows environment. If you are already familiar with the windows environment, you can skip the rest of this chapter and refer to it at a later time when you need to. You can continue on to the next chapter, *axiUm Modules* on page 25.

Before you begin, make sure you have successfully logged into axiUm.

This chapter covers the following topics:

- Application screen
- Windows
- Message boxes

A true Windows 32-bit application, axiUm provides user-friendly windows to accommodate all levels of end-users. When you finish this chapter, you will be familiar with the look and feel of axiUm’s windows environment.
1 Application Screen

The application screen is the first screen you will see when you log onto axiUm. The axiUm application screen is shown below:

![Application Screen](image)

The axiUm application screen displays the following elements:

- Title Bar
- Desktop
- Menu Bar
- Module icons

Read the following sections for more information about the axiUm application’s interface elements.

1.1 Title Bar

The title bar is the top bar on the screen. It shows the axiUm name.
1.2 Desktop

The desktop is the virtual office in the middle of the application screen. You can click on the office elements to open the corresponding module.

You can also access modules using the menu bar. See Menu Bar on page 7. Alternatively, you can access modules using the icons. See Module Icons on page 19.

1.3 Menu Bar

You can access many of the functions using the drop-down menu. Each menu contains a set of options. Click on the menu name to display a list of options that you can select. The following example shows the Actions menu.

You can also access modules through the Desktop. See Desktop on page 7. Alternatively, you can access modules using the icons. See Module Icons on page 19.

The following sections will give you a general overview of the aXiUm menus.
## Actions

Each Action menu option opens a module in axiUm.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Tools</th>
<th>Links</th>
<th>Patient</th>
<th>Window</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reload...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Cara...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduler...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transactions...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMR...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perio Chart...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ortho Manager...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Attachments...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Planner...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Assignment...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overdue Patients...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chart Tracker...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluations...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dispensary...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventory...</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Lab Tracking...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Info Manager...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desktop...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Tools

The Tools menu offers the user access into the extended feature of axiUm.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Tools</th>
<th>Links</th>
<th>Patient</th>
<th>Window</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ScratchPad...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Messenger...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Survey</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>X-Ray</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Imaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Imaging 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3D Image</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educatio...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Switch User...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Log On As User...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Log Off...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entry on Behalf of Provider...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set axiUm Defaults...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Password...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Touch Pin...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Just as Post-it™ notes are used in offices, axiUm offers its own electronic version of sticky notes. The Stickies window lets you place temporary, notes of up to 255 characters into many of axiUm's modules (e.g. Patients, payments, adjustments, and appointments). These notes have options so that they can be used as reminders throughout the program. For example, a patient note could be set up to print on a routing slip, on a statement, or display on screen when a user selects the patient. The following table lists and describes the various areas of axiUm where sticky notes can be used.

<table>
<thead>
<tr>
<th>Location Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment</td>
<td>Specific Appointment</td>
</tr>
<tr>
<td>Appointment Day</td>
<td>Specific date in Scheduler for all users</td>
</tr>
<tr>
<td>Rolodex</td>
<td>Rolodex for everyone / all patients</td>
</tr>
<tr>
<td>Patient</td>
<td>Patient Card for specific patient</td>
</tr>
<tr>
<td>Transaction</td>
<td>Specific patient in Transactions module (top left)</td>
</tr>
<tr>
<td>General</td>
<td>General tab in Transactions, specific patient (top right)</td>
</tr>
<tr>
<td>Treatment</td>
<td>Treatment tab in Transactions, all patients (top right) or specific line</td>
</tr>
<tr>
<td>Planned Tx</td>
<td>Planned sub-tab of Treatment tab in Transactions, all patients (top right) or specific line</td>
</tr>
<tr>
<td>Office</td>
<td>Office tab in Transactions, all patients (top right) or specific line</td>
</tr>
<tr>
<td>Payment</td>
<td>Payment tab in Transactions, all patients (top right) or specific line</td>
</tr>
<tr>
<td>Adjustment</td>
<td>Adjustment tab in Transactions, all patients</td>
</tr>
<tr>
<td>Ins Pmt</td>
<td>Ins Pmt tab in Transactions, all patients</td>
</tr>
<tr>
<td>Clinic</td>
<td>Scheduler</td>
</tr>
<tr>
<td>Book</td>
<td>Scheduler</td>
</tr>
<tr>
<td>Availability</td>
<td>Scheduler</td>
</tr>
</tbody>
</table>
Scratch Pad

This menu option displays the Scratch Pad window.

The Scratch Pad window provides a larger area to enter notes than the Stickies window. The Scratch Pad window includes a spell check, and also a copy and paste feature you can use with axiUm's note fields.
Messenger

This menu option displays the Messenger window.

The Messenger feature allows individuals and groups to send and receive messages. Providers can be notified of events like patient assignments by axiUm itself and instructors can send the same message to an entire group of students.

This was designed to let staff members, administration, and students to communicate quickly with individuals or groups throughout the institution (e.g. upcoming seminars and cancelled classes). Much like an e-mail application, the user can read, send, reply to, forward, and delete messages. These messages are not sent via the internet, and are only accessible within the axiUm software.
Survey

This menu option displays the Survey window.

The Survey window is used to conduct, record, and view data (e.g. patient screening, patient satisfaction reports, and student self assessments). Only one form of each type defined is available for each patient and answer histories are not recorded, unlike EPR forms which allow multiple forms and record form history.

X-Ray, Imaging, Imaging 2

If axiUm is configured to interact with X-Ray and image analysis systems like Emago these can be accessed using the X-Ray, Imaging, and Imaging 2 (available in release 4.5 only) tools. The X-Ray viewing icons in the Desktop in the first two (or three) chair area will access the X-ray or Imaging applications. If installed, Imaging is available in an Imaging tab (or two tabs where two image viewing systems are integrated with axiUm version 4.5) in the EHR module.
3D Image

This menu option displays the Three Dimensional Image window.

The Three Dimensional Image window shows the selected patient’s teeth as a three dimensional image. A single area or the complete skull can be shown.

Educator

The Educator tool lets axiUm to start an application. This application is usually used to train users but could be any software accessible to the workstation. The path to the software must be set in the Maintenance module.

Switch User

This menu option displays the Switch User window.
The Switch User window gives you the ability to switch users while running axiUm so that administrators can perform tasks that regular users cannot, while keeping the currently selected patient on the screen.

**Keep currently selected patient**

Selecting this checkbox retains the currently selected patient for the next user. If the next user does not have access to this patient, axiUm displays an error message.

**Log On As User**

This menu option displays the Log On window.

The Log On window lets administrators log on as a different user without entering that user’s password. This is different from logging in as the administrator. When you log in as an administrator, axiUm lets you see everything, but if you are troubleshooting, you want to see only what that user sees. This features lets you do that.

Note: axiUm audits the action as the original user, not the administrator.

Note: The administrator using this mode cannot perform prescription-type tasks in axiUm or send messages using the Messenger module.

**Log Off**

This lets you log off axiUm while continuing to run the application. Then another user can log in.

**Entry on Behalf of Provider**

This menu option displays the Entry on Behalf of Provider window.
The Entry on Behalf of Provider window gives you the ability to enter information for another provider, allowing users (e.g. hygienists) to make clinical entries (e.g. treatments) on behalf of any provider (e.g. dentists). These entries are stamped with the other provider's name and can be set up to require approval regardless of whether the logon user normally requires approval for the specific record. Entries not associated to a provider (e.g. notes) will be stamped with the logged-in user's name.

Set axiUm Defaults

This menu option displays the Set axiUm Defaults window. axiUm can be set up to display this window during login.

![Set axiUm Defaults window](image)

The Set axiUm Defaults window displays the default values set up for this workstation. You can change these values, for this session only. The next time you log on to this workstation, axiUm resets to the default.

**Practice**

This drop-down field displays all practices, as defined in the Practices window. For information on the Practices window, refer to the axiUm Reference Manual for Maintenance and see Practices Window on page 432. This drop-down field defaults to the practice displayed in the Practice Address window.

**Facility**

This drop-down field is enabled if the Work Station Facility Override checkbox is selected in the Transaction Option window’s Miscellaneous section. For information on the Transaction Option window’s Miscellaneous section, refer to the axiUm Reference Manual for Maintenance and see Miscellaneous Section on page 67. This drop-down field defaults to the option selected in the field beside the above checkbox.

**Clinic**

This drop-down field displays all clinics that the logged on user can access, as defined in the User Accessibility for Clinics window. For information on the User Accessibility for Clinics window, refer to the axiUm Reference Manual for Maintenance and see User Accessibility for Clinics Window on page 698. This drop-down field defaults to this workstation's default clinic set up in the Station Options window.

Note: If you want the practice associated to the Transactions module or the Patient Approvals window to remain unaffected by the settings in the Set axiUm Defaults window, go to the Transactions Options window and deselect the Workstation Practice Override checkbox.
Change Password

This menu option displays the Change Password window.

![Change Password Window]

Use the Change Password window to change your current password to a new one.

Change Swipe PIN

This menu option displays the Change Swipe PIN window.

![Change Swipe PIN Window]

If you are using a combination of a swipe card plus PIN, and you want to change the PIN, you can do so anytime using the Change Swipe PIN window.

Links

This menu item lets you save web addresses, executable files, and documents in axiUm. This is a customizable menu.
Patient

This displays the names of patients shown in the Rolodex module's patient selection list. This lets you select patients already in the Rolodex module's patient selection list without having to open the Rolodex module.

- Select the Select Patients option to display the Rolodex (Select Patient) window for this patient. There is an Add to Selected Patient List checkbox (new). This checkbox is only available when you access this window from the axiUm main screen's Patient menu (e.g. accessing this window from the Scheduler window will not display this checkbox). Selecting this checkbox adds the patient to the Rolodex window's patient selection list.
- Select the Previous Patient option to select the previously selected patient as the active patient.
- Select a patient name to make this patient the active patient.
- Enter the number next to the patient name to make this patient the active patient. Note that only the first nine patients have a number, this is hard-coded and is not user-defined.

Window

The Window menu allows the user to quickly select an open a window. When many windows are open at the same time this is easier than moving windows around or minimizing them.

Help

The Help menu has two menu options.
Help

This menu option lets you access a help system, if you have uploaded one. For example, you can upload your own help notes for easy access.

About axiUm

This menu option displays the About axiUm window.

This menu option displays axiUm’s licensing and system information.
1.4 Module Icons

The icons are located to the left of the application screen. You can click on the icon to open the corresponding module.

You can also access modules through the Desktop. See Desktop on page 7. Alternatively, you can access modules through the menu bar. See Menu Bar on page 7.

2 Windows

axiUm uses windows for your main work area. These windows display data and allows you to select data from a list, or to enter and modify information.

Windows all share some common features:

- A title bar at the top of each window identifies the contents.
- A list of items you can choose.
• A number of command buttons.

2.1 Opening a Window

To open a window, click on a module icon. axiUm displays the corresponding module on the axiUm application screen.

2.2 Changing the Size of a Window

There are a few ways to change the size of a window:

• Click (Maximize) on the right end of the title bar to enlarge the window to fill the entire screen.
• Click (Minimize) on the right end of the title bar to minimize the window.
• Double-click the title bar of a window to enlarge the window to fill the entire screen.

2.3 Moving a Window

Click in the title bar and drag it to move the window.

2.4 Closing a Window

There are two ways to close a window in axiUm:

• Click OK, Cancel, or Done buttons.
• Click (Close) in the right end of the title bar to cancel the command and close the window.

2.5 Window Elements

Many elements make up a window. Depending on the window you are viewing, you may see a different combination of elements in each one.

List Views

List views display records pertaining to the module you have open. Because the list view only displays data, you cannot change the record's data directly from the list view. To make
changes, you must open the corresponding window, update the information, then save and close the window.

Search Forms

The Search window corresponds to the list view that is currently open. For example, if you have the Providers List window open, the search options displays.

Most search windows have multiple fields and options. You can search for a record using any of the fields provided. You can select as much or as little search criterion as you like. You can search for one or all records in axiUm. However, the more specific your search criterion, the more accurate the search results.

Some search windows have only one search field. axiUm will search the relevant group’s data based on this single criteria. For example, if you enter A in the search field, axiUm will display all search criteria that begin with the letter “A”. If you enter “_” (underscore) axiUm will display all data in the system.

Date Field Calendar

To enter a date in a date field, use the format: mm/dd/yyyy. Alternatively, click \( \text{FAQ} \) to display the calendar. If the date field is empty, axiUm defaults to the current date, shown by a selection indicator.

This section covers the following tasks:

- Selecting a month
- Selecting a day
- Selecting a year

If you want to select a different date, read the following sections.
Selecting Month

To select a different month, click ← and → to move back and forwards one month at a time.

Alternatively, click on the name of the month on either side of the current month:

Selecting Day

To select a day, open the calendar and click on a day to select it.

Selecting Year

To select a different year, click ← and → to move back and forwards one month at a time.

Print Setup

When you select to print a document, axiUm displays a Print Setup window.
To print:

1. Click (Print Report).

axiUm displays the Select Printer window.

2. Highlight an item. This is the printer you want to print to.

   You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

3. Click Select.

   axiUm prints the report to the selected printer.

3 Message Boxes

axiUm guides you through procedures by displaying message boxes that indicate what you are doing wrong, what to do next, or to warn you of a potential problem. You must acknowledge these messages by clicking a button on the message box. The message explains the consequences of your actions, so read the message carefully before responding.

There are two types of message boxes:

- Confirmations
- Warnings
- Errors

Some windows may have multiple warnings, or a combination of warnings and errors. Make sure you read the entire list.
3.1 Confirmations

Confirmations are to verify your actions before committing to them. This is to prevent you from accidentally performing irreversible actions.

To complete your action, click the OK button.

To cancel your action, click the Cancel button.

3.2 Warnings

Warnings are for your own information, and often notifies you of possible consequences.

When you click the OK button, axiUm acknowledges that you are aware of this warning. You can continue doing your work.

3.3 Errors

Errors will not allow you to continue your work. You may be required to abandon your action or close axiUm and re-open it.
This chapter describes each axiUm module. The software is module-based, so your institution may use as few or as many of the features as needed.

This chapter provides only a brief description about each module. For detailed information about a particular module, refer to the axiUm User Guide and the axiUm Reference Manual for the corresponding module.

1 About axiUm Modules

axiUm is a complete Dental Institution Clinic Management Program. This comprehensive package will eliminate the need to have multiple software applications operating in different areas of your dental institution. No more worries about trying to combine information from multiple databases. axiUm incorporates all of the features required into one software application using a single database.

Remote clinics are not a concern with axiUm. The application may be accessed over the Internet, providing off-site clinics with the same software and database access as is installed in your main clinic area. Additionally axiUm provides software for mobile clinics.

axiUm utilizes ORACLE™, the most powerful database in the world. This unleashes the power of the client-server database architecture and allows the flexibility of operating the server in UNIX or Windows.

Server while maintaining the clients in a graphical Windows environment. Having this power and flexibility allows you to select the hardware that best meets your needs and budget.
2  

**Rolodex Module**

The Rolodex module is the main interface to the patient list. Almost all interaction with patient records start here. A major part of the Rolodex module is the Patient Card window.

You can also access the Rolodex module from the Scheduler module.

### 2.1 About the Rolodex Module

Similar to the functions of a physical Rolodex, a user may add a new patient, search for an existing patient or delete an existing patient from axiUm’s Rolodex. There are also additional capabilities in the Rolodex to allow for making a chart request, appointment request, dispensary request, patient needs request, accessing the treatment approval and student evaluation windows.

### 2.2 Patient Card

User-defined patient office and financial alerts can be entered and are visible throughout the application. Appointment, recall and patient referral information is stored and maintained with a detailed history. Insurance policy coverage information can be added with no limit to the number of patient policies. Patient pictures may be captured or scanned into the system and can be displayed throughout the application, promoting easy patient recognition by students, faculty and administrative staff.

3  

**Patient Care Module**

The Patient Care module is a centralized area to access and view the patient's record. The Patient Care module provides detailed activity lists and custom reports.

This is especially important for an office that is paperless. The patient care module provides a detailed activity list and custom reports that can show whatever details the university feels to be important. This is a fully customizable module with each new report added as a tab. Each security level can have up to 99 different tabs and reports available to them.

4  

**Scheduler Module**

The Scheduler module is an appointment management tool that allows you to view, edit, and create provider chair reservations, patient appointments, daily and session layouts, and clinic / non-clinic times.
Chair layouts can be created to represent each clinic in the dental institution. From this window, clinic chairs or blocks of chairs can be pre-assigned to a particular student, discipline, instructor, student group or any combination of these. For example, if every Tuesday morning session is Orthodontics, then the scheduler can be set up so that only ‘orthodontic’ procedures can be booked on Tuesday mornings.

Non-clinic times including didactic courses, time-off and rotations can be entered and displayed within the scheduler window. The Scheduler itself uses drag-and-drop capabilities to enable an appointment to be rescheduled with the click of the mouse. Appointments can be scheduled from a recall list, from an appointment request list, from a list of pending appointments, or by immediate scheduling (without any list). There are 4 modes within which the scheduler can operate. The student scheduler (Chair mode), the appointment book scheduler (Active Mode), the availability scheduler (Availability Mode) and the faculty practice scheduler (Ideal Day mode).

4.1 The Student (Chair) Mode

This mode has internal security features which restrict users from modifying appointments and bookings other than their own. As a result, students see only their own scheduled appointments and chair bookings.

With this mode, students have the ability to reserve chairs and schedule appointments into these reserved chairs. The student mode only allows the user to book appointments into a reserved chair and does not allow users to book appointments by any other method. Security can be set-up and defined so that the students are not allowed to create or modify the various scheduler views.

4.2 The Book (Active) Mode

This mode gives users full access to all appointments and chair bookings made by the students and any other users. In other words, users are able to view information for all scheduled appointments and chair bookings for any/all patients, not just those assigned to them. This view allows the user to see both clinical time and non-clinic time for the providers.

Each book contains pre-defined chairs (possibly arranged by clinic) with clinic open and closed times into which appointments can be scheduled. Users specify which chairs to view in any particular book. In this mode, users do not have access to reserving a chair for a user (this is automatically done by the program when an appointment is booked), and cannot assign chairs to students and instructors (this must be done in the Student mode).

4.3 The Faculty Practice Mode

The Faculty Practice Scheduler was created to meet the needs of today’s faculty practice. This book type schedule allows for the University to set-up individual ‘Ideal/Demand Day’
schedules for their faculty practice providers. It also provides the flexibility to set-up different lengths of appointments for each individual doctor per procedure.

This scheduler may also be used in many of the graduate programs found in the university setting.

4.4 The Availability Mode

The Availability Mode scheduler was created to meet the needs of a university where large clinics are to be booked by staff. In this mode the providers make online requests for appointments. These requests are frequently monitored by a staff member who arranges the patient visit on behalf of the student.

Notes can be exchanged between the provider and the staff member keeping both apprised of any new information regarding the appointment. Staff use the availability and chair grid to match appointments to available providers and clinic times.

Clinic (department) criteria can be set up to assist personnel in booking appointments. If, for example, a clinic can handle no more than twelve surgical procedures in a single morning, the availability window will display the limit as well as the current count for the session.

4.5 The Appointment Expert

Finding available time for patient visits is easy with the appointment expert. By defining specific criteria, appointments can be found to meet the special requirements of patients and providers. Multiple unrelated patients can be scheduled for the same day visits if needed (e.g. neighbors car pool to the dental clinic).

5 Transactions Module

The Transactions module deals primarily with the business and financial aspects of operating a dental clinic. Administrative staff commonly uses it to access all functions dealing with claims, payments, adjustments, and office charges.

5.1 About the Transactions Module

With years of experience in the private practice management software business, Exan understands the needs of a computerized billing system. axiUm incorporates all of the necessary features from private dental practice, as well as others that are specifically related to the dental institution environment in the transactions module.
Complete patient ledgers of all account history can be displayed and printed, including aged accounts receivables. The system allows unlimited fee schedules to be stored and easily updated. axiUm automatically handles insurance pre-determination and coordination of benefits when a patient has more than one insurance carrier (both dental and medical). There is also an allowance for special billing arrangements with insurance companies. The entry of post-dated payments and bulk payments is done with ease. Financial integrity will not be lost in axiUm as a full audit trail of all transaction modifications is kept including the name of the user who made the alteration.

Collection letters, patient statements, receipts, estimates and ledger printouts are available at the click of a mouse button, while laser drawn (plain paper) or pre-printed insurance claim forms can be printed for billing or pre-authorization purposes. The users also have the ability to attach on-line sticky notes to individual transactions.

5.2 Payment Plans

Often in the academic world of dentistry, patients have trouble paying the full allotted amount owed to the dental clinic for the treatment performed. The Exan Academic programmers created a payment plan module to track payment plan electronically and make the tracking of the plans less labour intensive and far more efficient. Instead of one responsible party, as was the norm in past years, all the front office staff have the ability to view these plans and ensure payments were made on time and at regular intervals. The Payment Plan module also allows for numerous payment plans to be created for one patient (e.g. father may pay for orthodontic treatments and mother may pay for the remaining dental treatment).

6 Electronic Health Record Module

The axiUm Electronic Health Record Module (EHR) is a patient information data entry, access, and control system.

6.1 Treatment Planning

With this module, a patient can discuss his/her dental concerns with the student. From this discussion the student selects the probable cause of the problem and a diagnosis. The student starts to determine the objective of this treatment plan.

Additional objectives by the patient and a faculty member can also be assigned to this treatment plan. The student then begins to plan a course of treatment by matching the problem and diagnosis with possible treatments.

The student can plan several treatment options for comparison. Once this is complete, the instructor (and consultant if necessary) will confirm and approve these steps. The student will then choose a treatment plan from the option which most appropriate and request the instructor’s approval.
Once approval is obtained, the student creates a more detailed treatment plan. They select the exact procedure codes, the teeth which will be treated and estimates the cost of the treatment. The student can now assign a provider to the individual detailed treatment plan items. At this stage again, the instructor (and consultant, if necessary) will approve the student’s work. The student develops an appointment schedule for the treatment plan and an estimated completion date. Finally, the student presents this treatment plan to the patient who can approve all or part of it. This final document can be saved to the dental chart in axiUm’s database. Stages of this process can be turned off to speed up the treatment planning process.

6.2 Dental Chart

The system features charting of both hard and soft tissue, storage of digital x-rays and photographs, and enables real-time rotation, magnification, and manipulation of digital images. Items can be entered using a light pen, keyboard or mouse. Patient Problems and Objectives can now be attached to the patient’s chart, statuses can then be tracked and reported on.

Procedures and treatment plans are entered on a true 3-Dimensional dental chart. Mixed dentition for adolescent patients can be set up in seconds. The Dental Chart displays crowns, bridges, root canals, posts, pins, and more. A detailed viewing mode allows for marking watch areas on a specific tooth or for drawing a crack on the tooth. Single, multiple or all teeth may be viewed and rotated to display the image from any angle.

A highlighted chart number indicates that the patient has unapproved items on their chart. Faculty can use their swipe card to approve work and also grade the provider. The Full Treatment History, Forms, Periodontal Chart, Images, Prescriptions, Labs and Patient attachments are just a click away.

6.3 Treatment Planning

For added speed, each provider can prescribe from a commonly-written prescription list.

Within the prescription tab there is an accurate reading of the provider in charge of treatment and the Doctor responsible for watching over that treatment. Due to the important nature of prescription writing a prescription can never be edited after it has been prescribed. When a prescription as been entered and the drug and dosage is specified, the frequency automatically loads the applicable frequencies for the given drug and dosage. A powerful tool to help improve patient care is the Medical Alert feature. Patient medical information, including allergies, immunizations, current medications and conditions can bring up an alert to a patient’s record. This creates an automatic reminder to the provider and keeps them informed of important information about a patient. axiUm will send the prescription to a printer to be printed out for the patient.
6.4 Forms

axiUm has moved to a complete Electronic Patient Record. Understanding the need to move to a paperless environment, axiUm contains an enhanced area for the collection of clinical related information (e.g., Medical History). It also includes full online instructor approval/signature and a complete history (audit trail) of any and all changes to TX and non-TX specific notes and any other pertinent documentation found throughout the software. The Forms tab is designed completely by the institution. This includes all questions, answers, and tabs. The question types available are yes/no/unanswered, alphanumeric text, calculated fields, graphical images and drop down lists (again customized by the institution). A powerful feature of the EPR Forms is the ability to open a graphic image in edit mode so that the user can draw details on the image and save it as a response in the EPR record.

A patient can have multiple Forms associated with their record as well as multiple tabs within each form. The possibilities of which types of forms or information you want to track are endless. Within these forms there is the ability to calculate fields and track the calculated answer at the top of the EPR. Each tab of the EPR can be designed to require a free text comment to be added, or to require that the patient sign his approval/acceptance of the answers entered. Every change to an answer is recorded, and a history of these changes is viewable within the EPR Forms window.

6.5 Treatment Steps

Once a procedure code has been setup to accommodate Treatment Steps and it is selected, the steps are automatically added to the treatment list. As these steps are completed, the fees associated with each step are added to the root (real) procedure code, and disappear from the treatment list.

An example of the Treatment Steps is shown for a crown. The steps for this procedure are Preparation, Impression, Try-In, and Insertion. The impression is charged $150 towards the total fee for the crown.

7 Perio Chart Module

Use the Perio Chart module to access the periodontal records. Information (e.g., pocket depth, suppuration, and bleeding) can be indicated on a patient’s record.

The Patient Attachments is accessible from other axiUm modules. For information and instructions, see the axiUm User Guide for Patient Attachments module.

The Patient Attachments module can be access from the following:

- Patient Card window
- Transactions module
- Perio Chart module
8 Ortho Module

Optional module.

The Ortho Module is made of many integrated parts (e.g. patient registration, scheduling, the clinical component, and the patient’s financial records).

The Orthodontics Module is an optional module of axiUm that is designed to allow an orthodontics department to keep track of all clinical entries pertaining to the orthodontic patient in an organized and user-friendly system. This module allows the orthodontics department to enter key clinical information in a multi-tab system. This information can be entered at chair side, or after an appointment. This multi-tab system allows patient problems, key clinical findings and results of treatment to be compared and analyzed before, during and after active treatment.

The tabs can be customized for each institution. The institution sets up the tabs in a preferred access order and sets up questions for each tab. The answers for the tabs can be either simple text entry, selection from a predefined list, yes/no, calculated fields or graphic images.

Controls can be set for each phase of treatment to enforce appropriate criteria for appointments.

Instructor/student/patient relationships will be established and maintained unless manual overrides are authorized. Finally, the student or staff member can print all appointment information in report form to support their daily activity.

9 Patient Attachments Module

The Patient Attachment module saves copies of items given to patients (e.g. letters, consent forms, requests, and recall notices). The Patient Attachment module also saves copies of all forms received as part of the patient record (e.g. referral letters and x-rays).

The Attachment Manager allows the user to save copies of items that are given to patients (e.g. letters, consent forms, requests, recall notices) and to save copies of all attachments received as part of the patient record (e.g. referral letters, x-rays). This is especially important for offices planning to go paperless. axiUm allows the user to optionally save documents in the area of:

- Receipts
- Statements
- axiUm generated consents
- External consents and forms generated outside of axiUm
- Customizable on-line consents
External consents and forms are handled via scanning documents into the attachment manager. The “Release of patient information consent on file” can be optionally set to trigger warning messages, by setting the “Requires Consent” flag in axiUm options.

10 Personal Planner Module

The axiUm Personal Planner module provides the student with a complete overview of their workload. Unapproved items, assigned patients, appointments, requests, overdue patients etc are all accessible in this one area.

This is a great time saving feature. In a single window the student has access to their appointment list, chart requests, patient needs list, overdue patient lists, dispensary orders and lab orders.

Custom reports can be attached as tabs in the Personal Planner, and accessed by a single click.

11 Patient Assignments Module

The Patient Assignment module is a tool that can be used to assign patients according to provider needs. The student can request a specific treatment procedure, general treatment code, treatment discipline, or need that they are required to complete. The Patient Assignment module matches the student’s needs to a patient’s needs.

Students enter their 'need requests' which are then matched the needs of the patients. This module assists the dental institutions assignment officer in finding the students needs and patient requirements with the push of a button. No more paper needs to pass hands; this can all now be accomplished within the axiUm software. Access to the case load of the provider is just a click away.

As well, information on class averages for this type of patient / procedure and information on the timeliness of care provided by the student for his / her other patients will assist the assignment manager in making an appropriate assignment of patients to students.

12 Overdue Patients Module

The Overdue Patients module tracks overdue conditions, grants extensions, grants pro-active extensions, and sends messages to the student about overdue patients.

Overdue conditions are Oracle defined functions which are completely customizable to the University’s requirements.
Five of the most common conditions that trigger an overdue alert are included with axiUm.

- The patient is overdue for a visit. Based on the number of days since the patient was last seen.
- The student is overdue in creating a treatment plan. Based on the number of days since the student has been assigned a patient where there is not approved treatment added.
- The patient with a recall has not been seen. Based on number of days since the patient’s recall visit was due patient being seen.
- The patient is overdue to be re-activated. Based on the number of days that have passed since the patient was made inactive.
- The patient’s treatment plan is overdue. Based on the number of days since the treatment plan was added.

More overdue conditions can be added by the University, providing fully customizable tracking of the timeliness of patient care. When an overdue condition occurs, an internal message can be sent to the provider indicating the overdue condition (and associated patient). Additionally, the overdue condition will be visible to the assignment clerk when assigning providers to patients. When extenuating circumstances exist and you wish to grant an extension to a provider, axiUm provides a quick and easy method of entering these for the provider.

### 13 Chart Tracker Module

The Chart Tracker module is used to track a chart's location, and manage chart allocations to students and other providers.

Any chart requests produced from booking appointments and/or from the Rolodex, will appear in the Chart Request tab when a proper search is completed. The requested charts can then be Charted out, and managed with the chart tracker. From the Chart Out tab, users can Chart In the patient charts when they are returned from the providers. The Chart History and User History tabs allow users to track and manage charts for a specific patient or a specific user.

### 14 Evaluations Module

Optional module.

The Evaluation module is used for grading providers. The clinical manager uses the Evaluation module to ensure the instructors are completing the grading assessments.

There are two forms of grading Real Time and Periodic. The difference between the two types of student evaluation is Real Time grading occurs at the time treatment is completed, while Periodic grading occurs on a set time schedule (e.g. monthly). axiUm allows for an unlimited number of different evaluation forms to be used. There are also no limits to the type of grading
schemes that you wish to utilize. Anything from numbers 1.0 to 5.0 with an increment of 0.5, to letters A to F, to a percentage can be used as a grade. Whatever type of evaluation is done in your dental institution, axiUm has been designed to accommodate it.

15 Dispensary Module

Optional module.

The Dispensary module is used to track instruments and sundries, and manage these allocations to providers.

This module will order instruments for students based on appointment treatments, and/or manual student requests. From one of these methods of dispensary item ordering, a list of items needed for the clinic session is generated. These are then checked-out to the provider, used, and later returned (scanned back in) to the dispensary.

The Dispensary tracks the whereabouts of the instrument kits & sundries, records who has the item out, and how long they have been out for. The tracking of the dispensary items is also combined with controls (rules) to ensure providers return checked-out (used) kits promptly. The ability to lock students from receiving more instruments if previous orders have not been returned becomes a powerful tool for the dental institutions administration. The Dispensary will also track the sterilization cycle of the instruments. Finally, the Dispensary module allows for the ability to bill providers for overdue kits and missing kits and/or kit items.

16 Inventory Module

It is now easy to completely manage supplies, instruments, materials and sundries. axiUm tracks the receipt of goods, internal orders and external orders.

Inventory level tracking allows the institution to find and re-order items nearing the re-order point. With the Inventory module your University can save time and money by controlling the movement of products within the institution. Inventory can be tracked at multiple locations and during transitions between those locations. The Inventory module will increase the overall speed and accuracy of filling order requests.

The Inventory module also utilizes barcode technology to eliminate data input errors

17 Lab Tracking Module

Optional module.
The Lab Tracking tab is used to create laboratory location and contact information, supplementary information definitions, units of measurement, and materials. These are used in the Lab Tracking module to track lab work for procedures that require it.

Details from the writing of the prescription, through to sending the order out/in and associating costs / charges to the order are stored.

The lab charges can be generated from a pre-set procedure code list or can be determined when the lab work is completed.

It will also integrate with the scheduling of a patients next visit (it will not allow an appointment to be made unless the appointment is scheduled for after the lab work is intended to be returned) to ensure that the lab work will have arrived before the patients visit. The lab order window allows all information pertaining to the lab to be viewed in a single location. If the lab had to be re-done the original order will be visible in the lower list so that the user can toggle between the items in the list in order to see the full order history.

The weights window allows a university to keep track of materials dispensed and returned for the lab. The costs associated with both internal and external labs (are the institution’s lab fees high enough?) will be tracked within this module.

18 Emago

Optional module.

19 Info Manager Module

The axiUm Info Manager module lets you build and print reports based on data held in the axiUm database. Access is heavily controlled based on the user security levels, Power Admin settings, and other security controls built into this module.

While there are more than 250 standard reports included with axiUm (e.g. Bank Deposit, Accounts Receivable, etc., we could not foresee all of the reports that each institution would require. The solution was to allow custom queries to be effortlessly designed by the user providing an unlimited number of lists and reports in the Info Manager, axiUm's reporting module. Info Manager can return results on any field in any table in the entire database based on limitless user-defined search criteria.

Reports created by the University in third party tools (e.g. Crystal Reports, MS Office and Oracle forms) can be accessed through the axiUm Info Manager custom tab, thereby keeping all reporting in a centralized location with access security in place.
19.1 EDI Claims

Claims are batched to a central area and later submitted to the clearing house. On Submit an encrypted file containing the claim information is created. This file can then be sent in for remittance. From the EDI claims window a claim can be dropped to paper (printed), submitted or batched for later processing. Errors preventing the claim from being processed can also be corrected from here.

19.2 Trojan™ Services Integration

axiUm can import the files provided by Trojan™ making the insurance plan information current and easily accessible without entering insurance plan details from scratch.

Once the files are received from Trojan™ online services the axiUm user imports the information via the Trojan utilities provided in Maintenance.

Tracking accurate coverage templates for clients becomes a very simple process. When a Trojan policy is attached to the patient card, the employer demographic information, policy coverage template and insurance information for the patient are all automatically entered for the user.

As Trojan™ provides monthly updates, your policy information for patients is always up-to-date.

20 Maintenance Module

axiUm requires the setup team to enter various code tables. These code tables (setup files) defined in the Maintenance module provides the backbone of the axiUm system. Only administrators will access this area. Most of this setup is done prior to going live, however codes can be added to at any time.

This information will be stored in the database and axiUm will access this information later when required. This information is stored in various folders found in Maintenance. Each folder has several icons that represent specific information. Each icon can be individually selected and the user will enter the information requested by each associated window. It is the information entered and stored here, for example, which will allow the user to select a procedure from the procedure code list or to select a clinic and/or chair when the time calls for it. Spreadsheets of student’s schedules for rotations, non-clinic and clinic times can be imported into axiUm instead of manually keypunching in data. Most of the set-up will be done prior to the live date; however codes can be added and maintained at any time.

Access is via the Maintenance icon on the left of the axiUm main window. The codes are arranged logically by type in various folders. Each tab represents a group of codes that are related, (for example, all information related to appointments is held in the Scheduler tab.)
21 Sign-in Kiosk

Optional module.

The axiUm Sign-In application allows patients to alert axiUm that they have arrived for their appointment. This frees front desk staff from entering patient arrival into axiUm.

The kiosk workstation running the axiUm Sign-In application does not require axiUm to be installed on it. However, the Oracle Client must be installed on the kiosk workstation to access the axiUm database. This is because the axiUm Sign-In program uses the settings in the axiUm database.

22 axiUm HealthAccess

Optional module.

axiUm HealthAccess is an optional online module that allows patients to update and review their EPR (Electronic Patient Record) forms online.

23 Module Summary

Not only will students get a valuable understanding of the operation of a dental clinic, but also some of the data entry burden will be removed from administrative staff.

axiUm will support the operation of any dental institution in its business process. The application was designed to meet the present needs and adapt to the evolution of the modern dental institution.
If you want to switch users without exiting axiUm, you can log off the application. When you log off, axiUm remains running, but under no particular user.

1 Logging off

▼To log off axiUm:

1. From the Tools menu select Log Off.

   For information on the Tools menu, see Tools on page 8.

   axiUm displays a confirmation message.

2. Click Yes.

   axiUm displays the User Log On window.
You have successfully logged off. The next user can now log onto axiUm.

For instructions on logging onto axiUm, see *Logging on* on page 3.
1 Exiting

Exiting axiUm will automatically close all windows and modules.

▼ To exit axiUm:

1. Choose one of the following three methods:

   • Click [ ] on the top right-hand corner of the application window. If this icon is disabled, you must first close the current window.

   • Select the Actions menu and click Exit.

   • Go to the interactive desktop and click the Exit sign.

   axiUm displays the following message box:

   ![Message Box]

2. Click Yes.

   axiUm closes the application.