



Axiom Comparative Analytics 2018.4

Release Notes

Last Updated: 12/17/2018

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Summary

Kaufman Hall is pleased to announce the 2018.4 release of Axiom Comparative Analytics. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Contact support@kaufmanhall.com or your implementation consultant, and they will confirm an installation period with you.
3. **Back up Axiom database** – Kaufman Hall will confirm that you have a current backup of your Axiom database before applying the upgrade.
4. **Apply upgrade** – Arrange with your IT staff on an agreeable time for scheduled downtime to apply the program and product upgrade. This includes any post-upgrade hot-fix files that need to be copied into the system to address any post-release known issues that have been resolved.
5. **Complete manual updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

Support

As always, we appreciate your support of Kaufman Hall and look forward to continuing to meet your financial management needs. If you have any questions about your upgrade, contact Kaufman Hall Software Support at 1-888-543-6833 or support@kaufmanhall.com.

Training

Kaufman Hall offers multiple training options for our customers. These courses are part of your maintenance agreement and are free of charge. We strongly urge you to take advantage of all training options, including:

- Self-help videos
- Recorded webinars
- Virtual training courses

For a complete listing of our courses, please visit www.kaufmanhall.com.

Product upgrade notes

IMPORTANT: Apply this update ONLY if you have already applied the release and completed all the manual setup steps from the corresponding release notes.

When upgrading to Axiom Comparative Analytics 2018.4, keep in mind the following:

- This product upgrade contains updated dashboards, tables, and remediated defects.
- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

New features summary

This section includes a description for each new feature included in this release.

Data Explorer column changes

The Data Explorer table now includes Month Over Month and Year Over Year columns.

Data Explorer
To begin click the **Filters** (F) button, select the filters and click **Apply**

[Help](#) [Export to Excel](#)

Entity ↑	Standard Dept Class ↑	Measure ↑	Period ↑	Bud Var %	Month Over Month		Year Over Year	
					Change	Change %	Change	Change...

Filter interface changes for Peer Group selection

Axiom Comparative Analytics now displays a Peer Group selection dialog on the Peer and Data Explorer dashboards when you click the Peer Group Categories drop-down in the filter menu. Previously, the filter menu listed a series of check boxes.

Choose a value for PEERGROUPCATEGORY.

Type here to search

Select All / Clear All

☐ 1 - Bed-Size

☐ 2 - Region

☐ 3 - State

☐ 4 - Bed-Size / Region

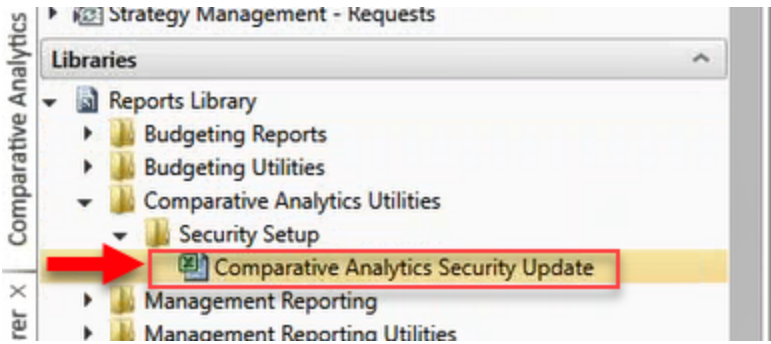
☐ 5 - National

OK Cancel

Security Update utility

Administrators can use the new Axiom Comparative Analytics Security Update utility to assign subsystems, roles/tables, and set filters for each table associated with a specific user.

NOTE: We will assign default tables for all roles except the EntityMetric Table Filter. You will have to enter these manually.



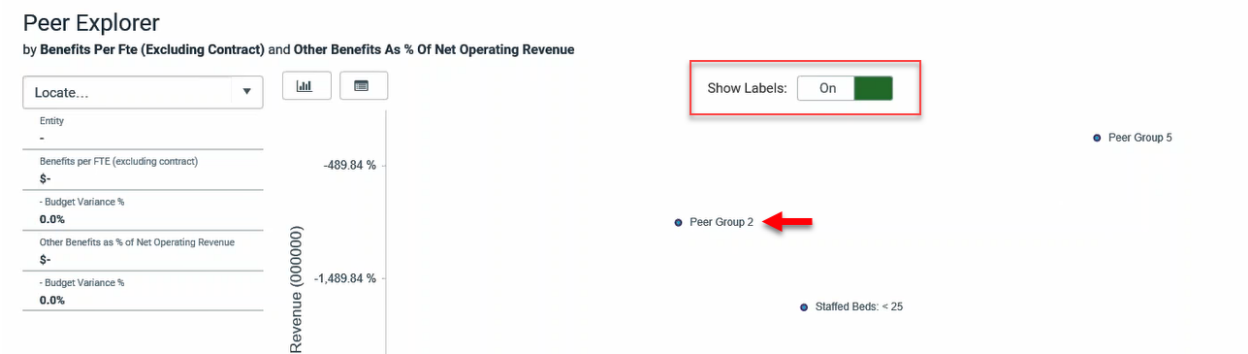
Comparative Analytics Security Update v1.0

* Note: This utility only adds users to systems & roles. If you need to REMOVE a user from a system or role, you must use the Security Manager. Not this utility.

Update	LogName	PrincipalID	FirstName	LastName	EmailAddress	Comparative Analytics System	Comparative Analytics Dept	Comparative Analytics Entity	Comparative Analytics JobCode	Comparative Analytics Salary	Computed Input Dept/Metric Table Filter	Computed Input Entity/Metric Table Filter	Computed Input Jobcode/Metric Table Filter	State
Save clickhouse	36	CFO@uax	CA_Testing	tscto@kaimarkhal.com		TRUE	TRUE	FALSE	TRUE	TRUE	DEPT:0		DEPT:Approved clickhouse OR DEPT:Owner clickhouse OR DEPT:Reviewer clickhouse	DEPT:Approved clickhouse OR DEPT:Reviewer clickhouse
Save clickhouse	37	Dept@uax	CA_Testing	tscto@kaimarkhal.com		TRUE	TRUE	FALSE	FALSE	FALSE	DEPT:0			
Save clickhouse	38	Director@uax	CA_Testing	tscto@kaimarkhal.com		TRUE	FALSE	TRUE	TRUE	FALSE		ENTITY:Entity1	DEPT:Approved clickhouse OR DEPT:Owner clickhouse OR DEPT:Reviewer clickhouse	
Save clickhouse	39	VP@uax	CA_Testing	tscto@kaimarkhal.com		TRUE	FALSE	TRUE	FALSE	FALSE		ENTITY:Entity2	DEPT:Approved clickhouse OR DEPT:Owner clickhouse OR DEPT:Reviewer clickhouse	

Show Labels toggle in Peer Explorer

You can now disable the data point labels on graphs in the Peer Explorer using the On/Off toggle above the graph.



Integration with Strategy Management

IMPORTANT: Your organization must be licensed for Axiom Strategy Management to use this feature.

Individuals with the Strategy Management Initiative Creator role can now create initiatives from the Metric Explorer from any KPI box in the dashboard.

