



Axiom Healthcare Suite 2018.3

Release Notes

Last Updated: 9/24/2018

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Version: 2018.3

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Introduction

This document provides the list of changes to shared areas of the Axiom Healthcare Suite products, which includes:

- Suite-wide feature additions and changes
- Security changes
- Key platform changes

Each Axiom Healthcare Suite product also has their own separate release notes that provide additional details on features and fixes specific to that product.

IMPORTANT: Prior to upgrading, make sure to review the **Axiom Software 2018.3 Release Notes** as well as the release notes for each product licensed by your organization.

Summary

Kaufman Hall is pleased to announce the 2018.3 release of Axiom Healthcare Suite. 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: Refer to the respective Release Notes of each Axiom Healthcare Suite product licensed by your organization for product-specific considerations before upgrading. You must apply the Axiom Software Platform 2018.3 upgrade before applying any 2018.3 product upgrades. The Axiom Software Platform upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software Platform 2018.3 before the first product upgrade.

When upgrading to the 2018.3 version of Axiom Healthcare Suite 2018.3, keep in mind the following:

- Each product upgrade contains updated templates, calculation methods, driver files, and remediated defects.
- Suite-upgraded components are included in all product upgrades.
- 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.
- KHA product templates and calculation method libraries will be replaced.
- 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.

Upgrade considerations

The following table describes upgrade considerations that your product administrator should review to determine the appropriate course of action:

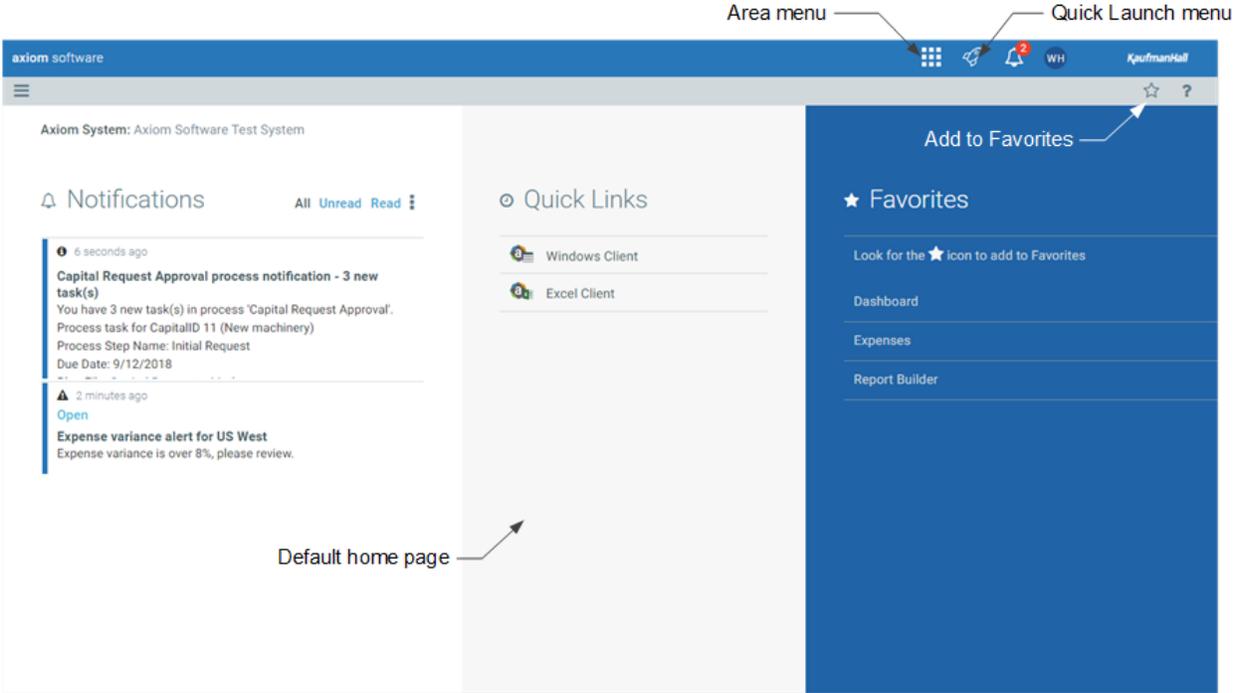
Product	Considerations
Axiom Software Platform	Upgrade. Each product is back-wards compatible, so staying on the latest platform version has many benefits with no risk.
Axiom Budget Planning	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Performance Reporting and Productivity	Upgrade if you are not in an active Budget planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Rolling Forecasting	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Financial Planning	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Capital Planning and Capital Tracking	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded. Upgrade Axiom Capital Tracking at the same time as Axiom Capital Planning.
Axiom Cost Accounting	Contact your Kaufman Hall Implementation Consultant for a recommendation before scheduling an upgrade for this product, but you can upgrade the platform to receive the platform level gains.
Axiom Contract Management	Contact your Kaufman Hall Implementation Consultant to schedule an installation.
Axiom Cost Management	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Decision Support	Contact your Kaufman Hall Implementation Consultant for a recommendation before scheduling an upgrade for this product, but you can upgrade the platform to receive the platform level gains.

New features summary

The following section describes new features and enhancements specific to the Axiom Healthcare Suite for version 2018.3. For new features specific to products, read the release notes for the products licensed by your organization.

Web Client user interface

In this release, we continue to update and enhance the Web Client user interface. These changes are intended to better organize the features in the Web Client, improve ease-of-use, and provide more built-in features. The changes shown below and other related changes are discussed in the following sections.

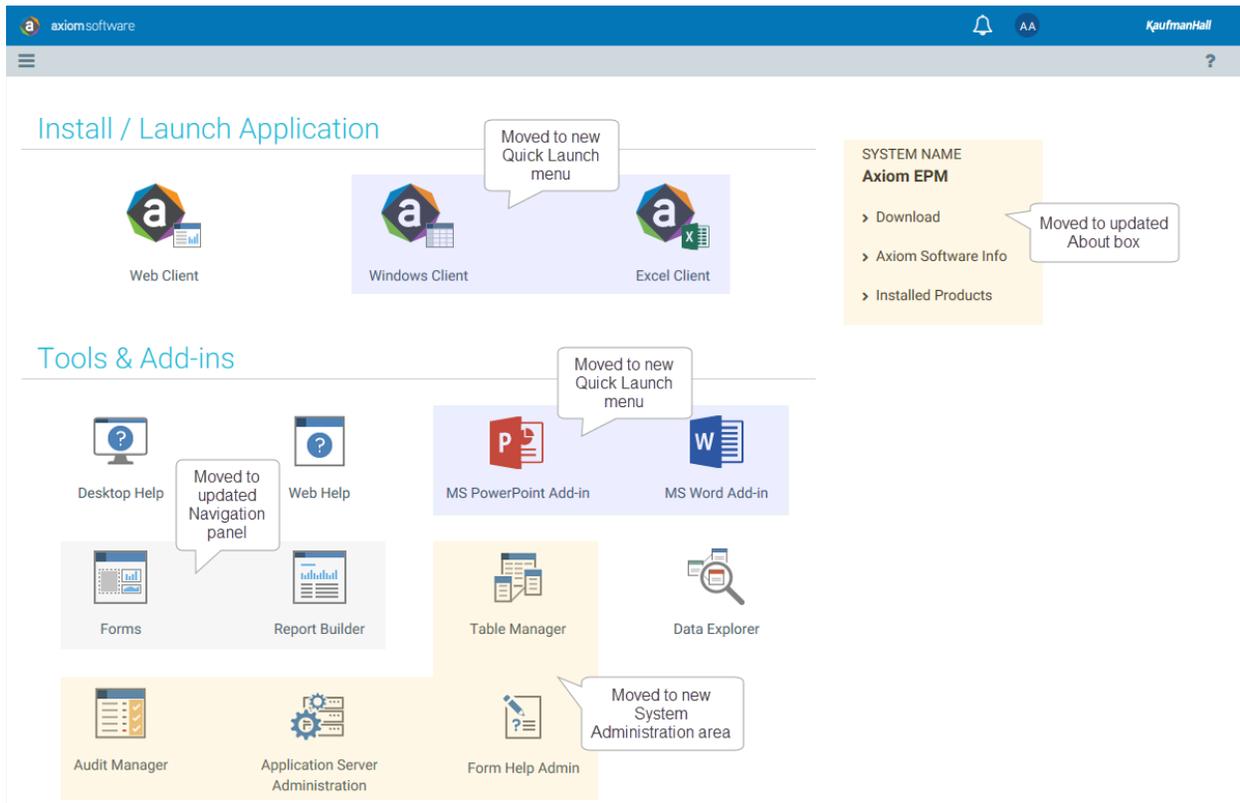


Updated Web Client user interface

Removal of the Launch page

The Web Client Launch page has been removed as part of our efforts to reorganize and update the Web Client user interface. The contents of the Launch page have been moved to new locations as appropriate for the target audience and purpose of each item.

The following screenshot of the former Launch page maps its contents to the new areas:



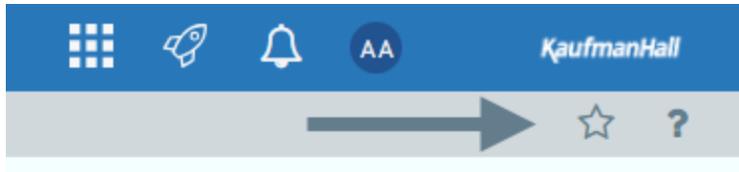
Contents of former Launch page mapped to new locations

The following features are now available at the following locations:

- **Applications:** You can now launch the Excel Client, Windows Client, and Microsoft Office add-ins using the new **Quick Launch** menu in the blue global navigation bar. For more information, see [New Quick Launch menu for applications \(page 10\)](#). Additionally, the Excel Client and Windows Client can also be launched from the **Quick Links** area of the new default home page.
- **System Administration:** A new **System Administration** area has been created to provide access to system administration features, such as the Table Manager, Audit Manager, and other various features. This area is accessible using the new **Area** menu in the blue global navigation bar. For more information, see [New Area menu and System Administration area \(page 11\)](#).
- **Browser-Based Documents:** You can now access the Report Builder and the Forms Explorer using the updated **Navigation** panel in the gray task bar. For more information, see [Updated Navigation panel \(page 16\)](#).
- **System Information:** You can now view system information and download prerequisites using the updated **About** box. The About box is accessible using the new **Area** menu in the blue global navigation bar. For more information, see [New Area menu and System Administration area \(page 11\)](#).

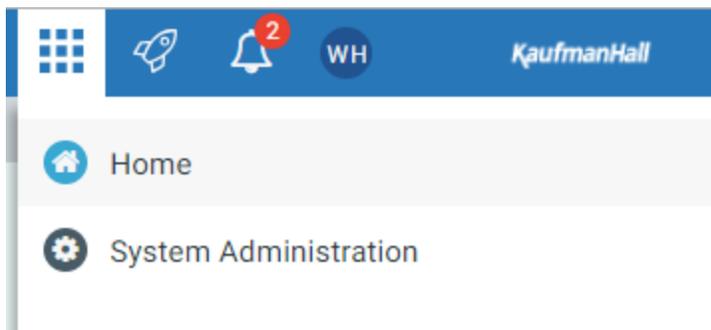
The former Launch page also contained the following items, which are handled as follows:

- **Data Explorer:** The **Data Explorer** link that used to be present on the Launch page is no longer available. The Data Explorer has been de-emphasized in favor of the Report Builder. For backwards-compatibility, you can still access the Data Explorer using a direct URL to the Data Explorer page, or using the Desktop Client. The direct URL to the Data Explorer page is `<AxiomURL>/DataExplorer`.
- **Help:** The **Desktop Help** and **Web Help** links that used to be present on the Launch page are no longer available as stand-alone links. Help for the Web Client can be accessed using the question mark icon that displays in the gray Task Bar across the top of Web Client pages.



If you want to view the full Axiom Software Help (Desktop Client Help), you can open help from the Desktop Client. The Web Client Help also contains links to the Desktop Client Help on the home page, and in various topics as appropriate to provide additional information.

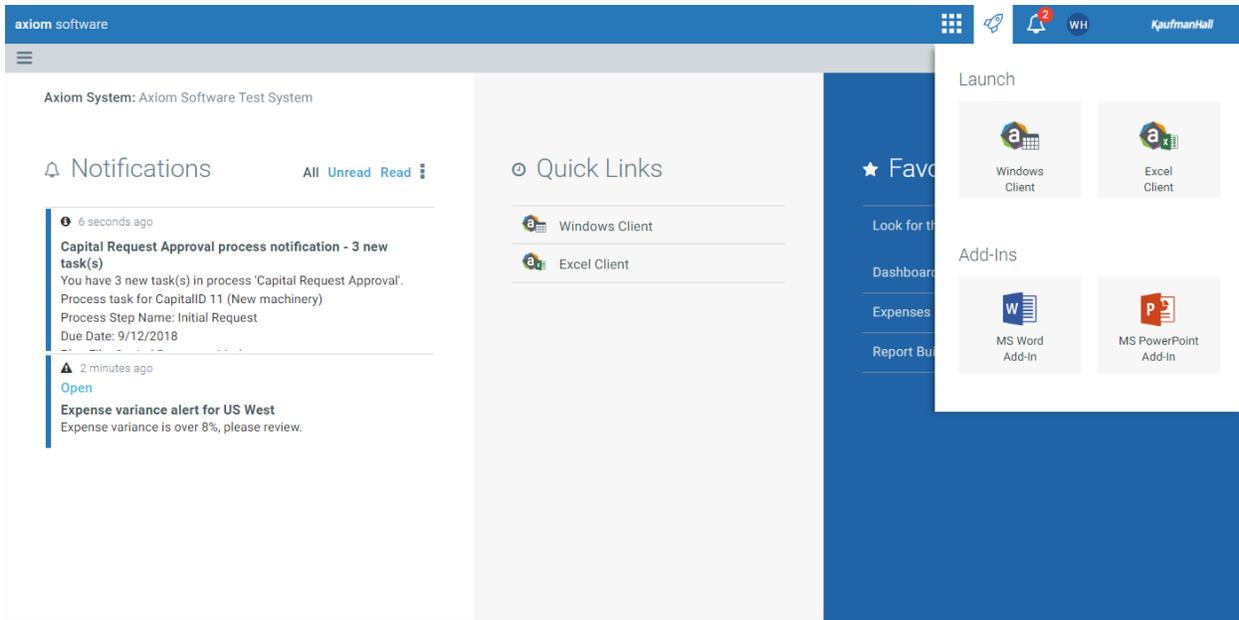
- **Web Client:** The **Web Client** link that used to be present on the Launch page is not present on the new Quick Launch menu, because it is no longer necessary. Clicking this link used to take you to the Web Client home page. You can now access your home page using the **Home** link on the **Area** menu.



The Launch page also used to serve as the default home page for any users who did not have access to a custom, browser-based home page (an Axiom form or a web report). A new default home page is now used for these users. This default home page displays the user's notifications, web favorites, and quick links. For more information, see [New default home page for the Web Client \(page 18\)](#).

New Quick Launch menu for applications

Users can now launch client applications and add-ins using the new Quick Launch menu. To open the Quick Launch menu, click the rocket icon in the top right of the blue global navigation bar.



New Quick Launch menu

Click any of the icons to launch the corresponding client or add-in. The links work just like they did on the previous launch page:

- If an item is not already installed, clicking on it installs the item.
- If an item is already installed, clicking on it launches the item.
- The items honor the existing system configuration settings to determine which items display in the Quick Launch menu. For example, the system configuration setting **AllowShowExcel** can be used to hide the Excel Client from the Quick Launch menu.

This new menu allows users to easily launch applications from any area of the Web Client. It is no longer necessary to navigate to a specific page in order to launch applications.

The Quick Launch menu contains all of the application and add-in links that used to be available on the old Launch page, with one exception: the **Web Client** link is not present on the new Quick Launch menu, as it is no longer necessary. Clicking this link used to take you to the Web Client home page. You can now access your home page using the **Home** link on the new [Area menu](#).

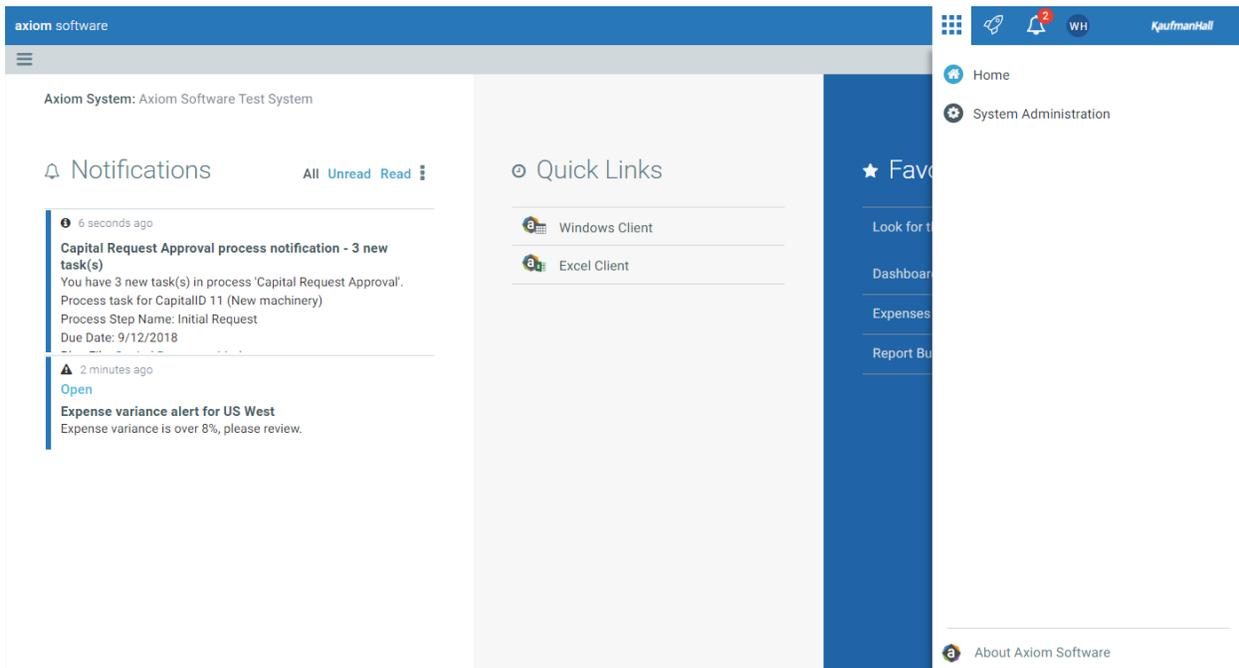
New Area menu and System Administration area

A new Area menu is available to switch between different areas of Axiom Healthcare Suite in the Web Client. This change is intended to better organize the Web Client into defined areas for use by specific audiences. The Area menu is located in the blue Global Navigation Bar across the top of Web Client pages.

By default, three items are present on the menu:

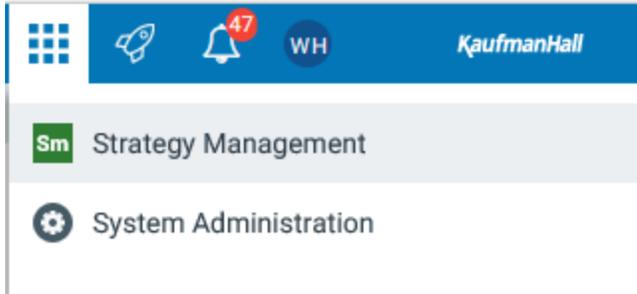
- **Home:** Return to your Web Client home page. Each user's Web Client home page is determined in the same way as previous versions, with one exception. In previous versions, if a user did not have a browser-based home page assigned in either Security or the Axiom Startup folders, then the Launch page would be used as the user's home page. Now, Axiom Software provides a [default home page](#) to be used in this circumstance.
- **System Administration:** Navigate to the System Administration area. This area provides access to various system administration features, such as the Table Manager and the Audit Manager. The administration features that used to display on the Launch page are now available here.
- **About Axiom Healthcare Suite:** View information about the system, such as the current version, and download installation prerequisites as needed. The system details that used to display on the Launch page are now available here.

NOTE: While available in 2018.3, this feature will be used more extensively in future product versions.



Example Area menu

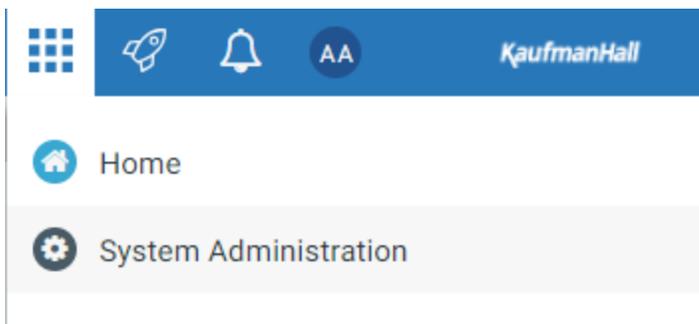
In systems with installed products, the products that are designed to be used primarily in the Web Client also display on this menu. In this case, the Home item does not display, because selecting the product name takes you to the home page for that product. See the applicable product-specific documentation for more information.



Example Area menu in product system

► System Administration area

All system administration features in the Web Client are now accessible in the new System Administration area. To switch to the System Administration area, select **System Administration** from the Area menu.

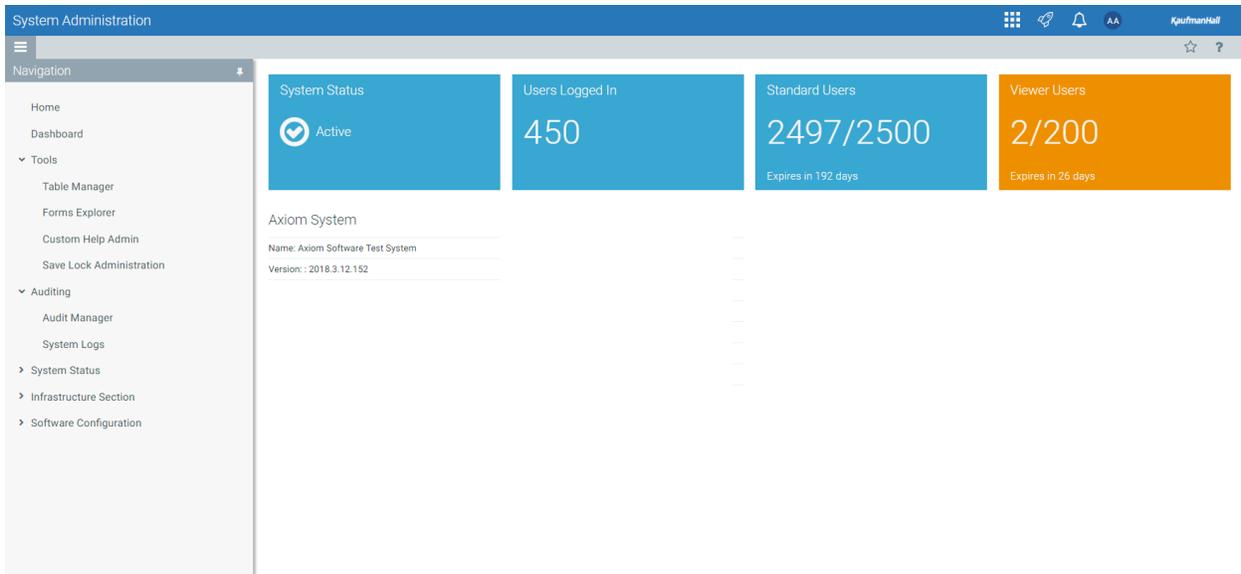


System Administration on new Area menu

This menu item only displays to administrators and to users with one of the following permissions: Administer Tables, Administer Picklists, Administer Software Updates, Administer Locked Items, Browse Audit Log, and subsystem administrators.

Once you enter the System Administration area, you will see the following:

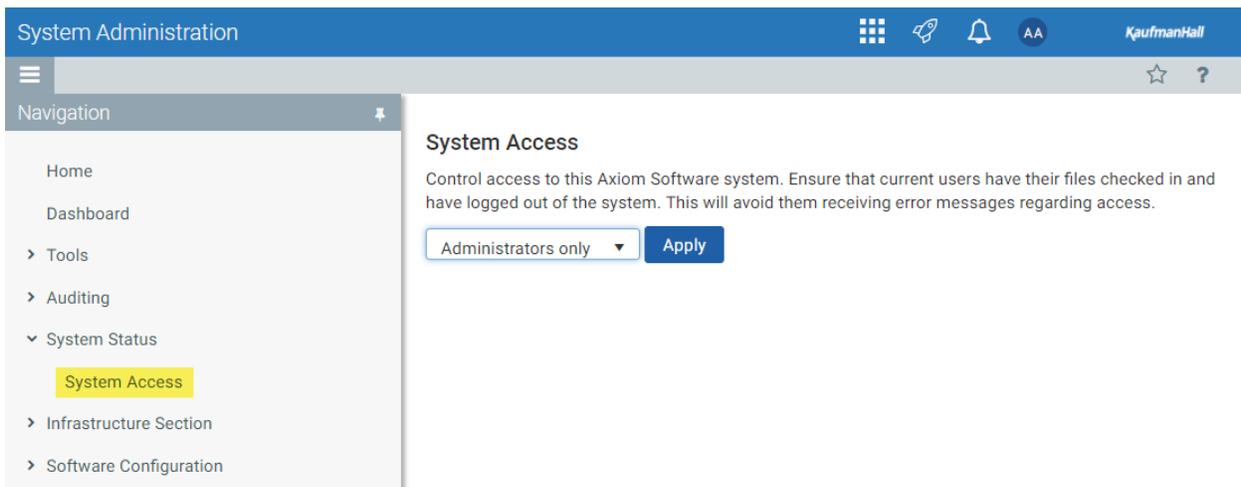
- **System Administration menu:** The contents of the Navigation panel update to show the available administration features. Select any feature name to open the corresponding page. Administrators can access all features. Non-administrators only see the features that they have permission to access.
- **Dashboard:** The landing page for the System Administration area is a dashboard that shows system information and status details. Administrators see all of the information. Non-administrators only see the basic system details such as the system name and version.



Example System Administration area

The Navigation panel will continue to only show administration features until you exit the System Administration area. To exit the System Administration area, open the Area menu again and select either **Home** or a product name. The Home link is also available at the top of the Navigation panel.

In addition to the existing system administration features, we have added a new page to control system access. This is the same feature that is available in the Desktop Client (at **Manage > Security > System Access**). From the new System Administration area, select **System Status > System Access**. From here you can change system access from **Full Access** to **Administrators Only**, and back.



New System Access page

Also note that the previous administration pages **Manage Servers** and **Reset Server Caches** have been merged into a single page named **Reset Services**. This page is available in the **Infrastructure Section**.

With the introduction of the new System Administration area, navigation to the Table Manager is now only available to users with access to the new System Administration menu item. However, in previous versions, all users could see the Table Manager item on the Launch page and could access the area.

These users can still access the Table Manager using a direct URL if needed (:

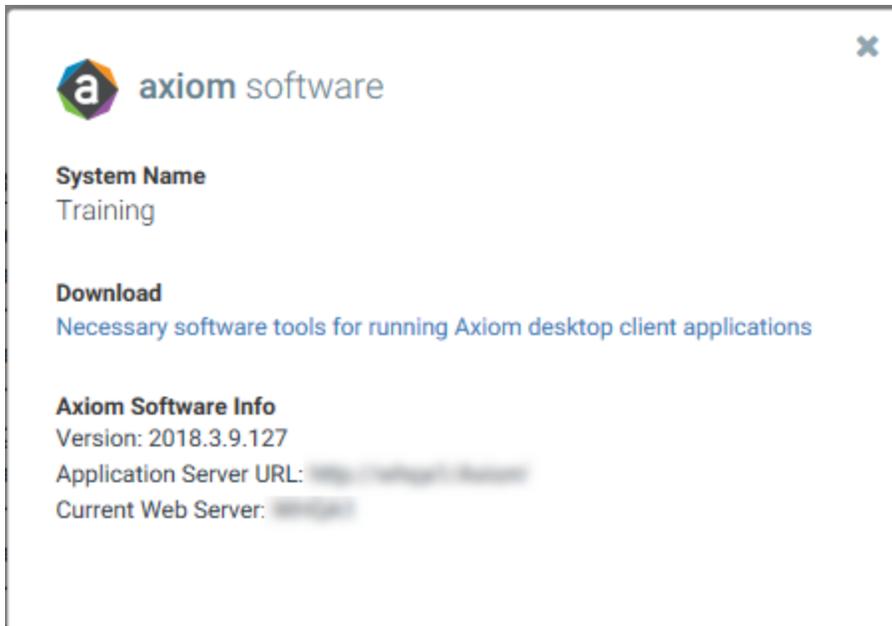
`<PathtoAxiom>/TableManager`), but they will no longer have built-in navigation to the area. This means that the change may affect the following users:

- Users with access to the Data Diagrams Library. These users can no longer navigate to the Table Manager to open data diagrams. They can still open existing data diagrams from the Desktop Client, which will open the diagrams in the Web Client. Once they are there, they can also create new diagrams if they have the appropriate permissions. However, currently there is no way to create a new data diagram from the Desktop Client.
- Users with **Allow changing table structure** for a specific table. These users can no longer navigate to the Table Manager to edit a picklist or KPI table where they have this permission. They can still edit the table structure in the Desktop Client.
- Users with read/write access to picklist tables. These users can no longer navigate to the Table Manager to populate a picklist table where they have this permission. They can still save values to the table using any other save-to-database features.

If you happen to have users that fall into one of these categories, and you want them to continue to use the Web Client for these activities, they can set browser bookmarks for the specific URLs, or you can create a form for their use that links to the necessary URLs. Please contact us if you have any concerns about these changes.

► Updated About box

To view system information, click **About Axiom Software** at the bottom of the Area menu. This updated dialog displays the system name, version, certain server details, and a link to the download prerequisites page (for Desktop Client installation). If your system has installed products, those products and their versions are also listed here.



Updated About box

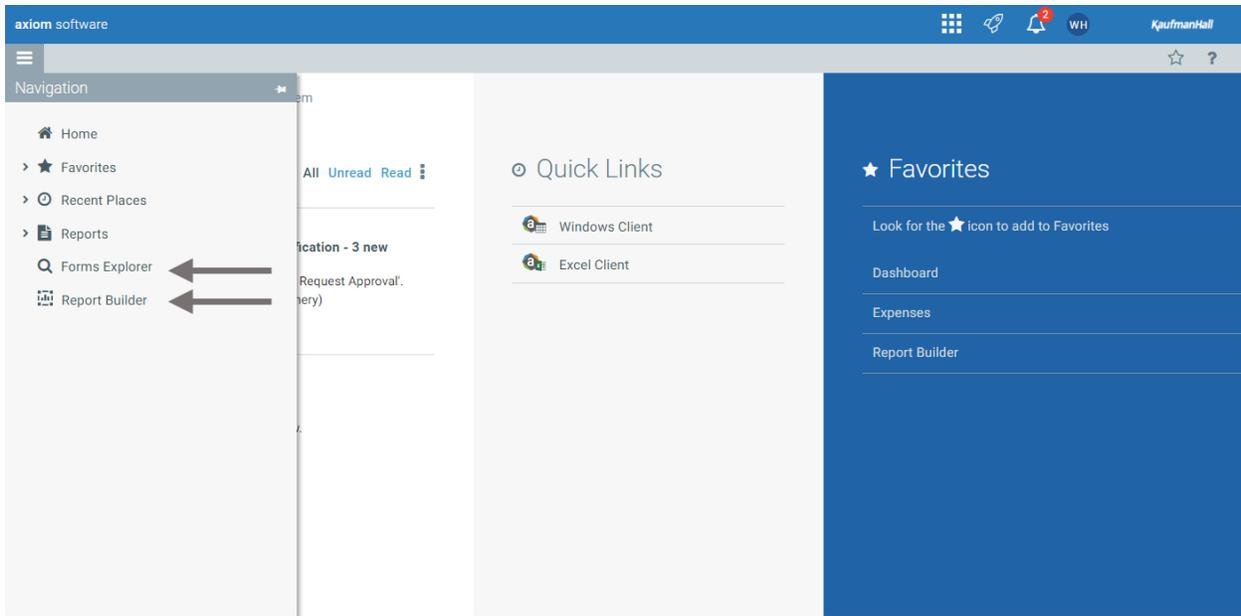
Updated Navigation panel

The existing Navigation panel in the Web Client is used to open reports and navigate to certain important locations of the Web Client. As part of the Web Client navigation changes, we have updated the Navigation panel as follows:

- The default Navigation panel now includes links to the Report Builder and Forms Explorer pages. These links are intended to replace the links that used to be present on the Launch page.

IMPORTANT: For existing installations, action is required to [update](#) your Navigation panel to use the new default contents.

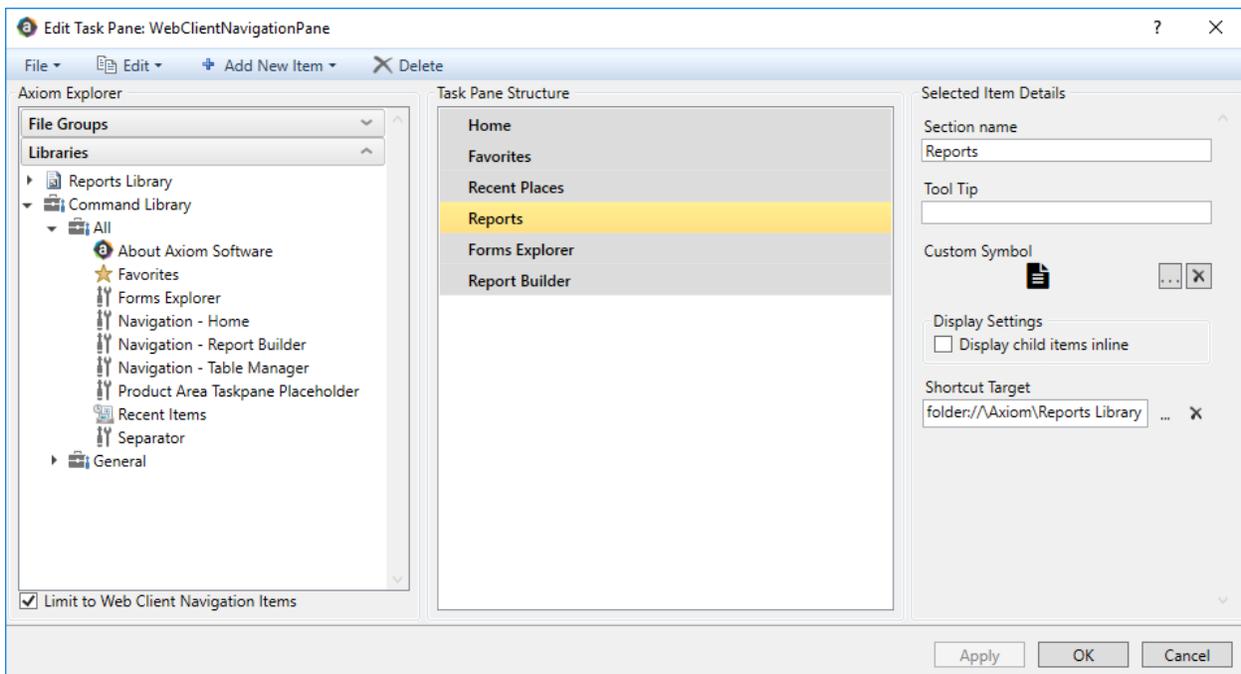
- Icons can now be displayed next to items in the Navigation panel. The default Navigation panel now includes icons. If you customize your Navigation panel, you can also use icons with your custom items.
- Separators can now be used in the Navigation panel. The default Navigation panel does not use any separators, but you can now use separators in any customizations you choose to make.



Updated Navigation panel with additional links and icons

► Enhancements to Web Navigation task panes

Web navigation task panes, such as `WebClientNavigationPane.axl`, now support additional task pane features. These features are now exposed in the task pane editor when creating or editing a web navigation task pane. Web navigation task panes are indicated by enabling **Limit to Web client Navigation Items** in the task pane editor.



Web navigation task pane in the task pane editor

The following features are now available for web navigation task panes:

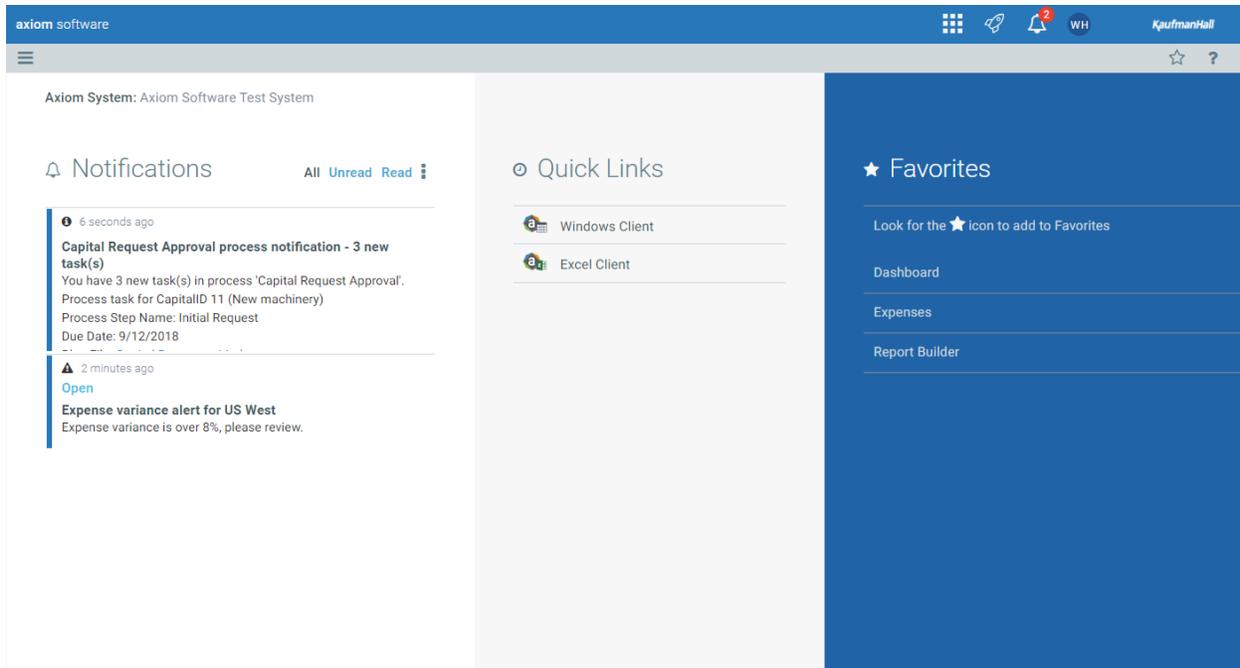
- You can now assign each item an icon using the **Custom Symbol** property. Click the [...] button to select an icon. The same icons available for use in Axiom forms are available here. Note that the Report Builder command has a permanent assigned icon, so it is not necessary to manually assign that item an icon (and if you do, it will be ignored).
- The property **Display child items inline** can now be used in Web navigation task panes. If enabled, the parent item does not display, and instead the child items display at the parent level.
- The following new commands can be used in Web navigation task panes:
 - **Navigation - Forms Explorer**: Navigates to the Forms Explorer page.
 - **Navigation - Report Builder**: Navigates to the Report Builder page.
 - **Separator**: Displays a horizontal separator line when the task pane is rendered in the Web Client.

As part of these changes, note that the previously available command **Navigation - Forms Admin** was removed. This command navigated to the old administration page. This command is no longer necessary for use in web navigation task panes, because the System Administration item is now automatically available on the new [Area menu](#) to all users who have access to a system administration feature. If you have an existing web navigation task pane that uses this removed command, it will display as an invalid link in the task pane editor. The invalid item is suppressed when displaying the task pane in the Web Client.

New default home page for the Web Client

Axiom Healthcare Suite now provides a default home page for the Web Client, to be used when a user does not have an assigned browser-based home page. This page is intended to provide a built-in, useful home page for customers who do not currently have a custom browser-based home page.

In previous releases, the Launch page was used as the default home page for the Web Client. Any users who used to see the Launch page when logging into the Web Client will now see the default home page.



Example default home page for the Web Client

The default home page shows notifications, favorites, and quick links:

- The Notifications area prominently displays the user's latest notifications. This area shows the same notifications as the Notifications panel. Users can review notifications, mark them as read, and delete them.
- The Favorites area shows the user's saved web favorites. Users can open favorites and delete favorites from this area. For more information, see [Manage favorites in the Web Client \(page 20\)](#).
- The Quick Links area is intended to provide easy access to certain important links. Currently, this area contains links to install and launch the Excel Client and the Desktop Client.

The rules determining a user's Web Client home page remain essentially the same, with a few modifications:

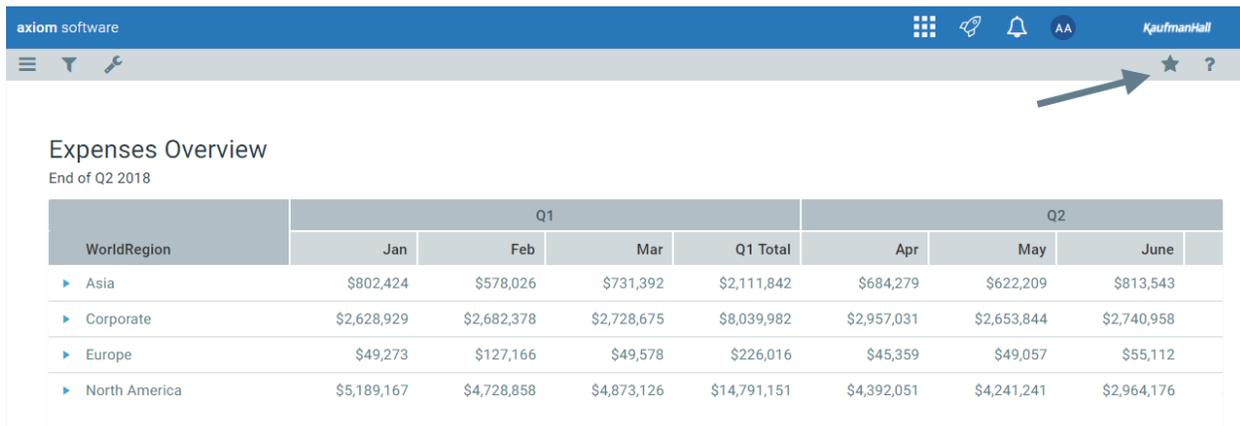
- If a user has access to a web product, the product home page is used. If multiple web products are available, the first product is used. This rule only applies in systems with installed products that have been configured for display as product areas in the Web Client. If this applies to your system, consult the relevant product documentation for more information on the product home page.
- Otherwise, the **Home Page** assignment in security is used, if the file is browser-based (Axiom form or web report). If the user has multiple assignments, they are prioritized as follows: User assignment > Role assignments (evaluated in alphabetical order) > Everyone role assignment.
- If the user does not have a browser-based home page assignment in security, then the default file in the Axiom Startup folders is used. The file must be present in the `Startup\Home\Web Client` directory and it must be an Axiom form.
- If none of these items apply, the default Web Client home page is used.

In non-product systems, the only change you may see after upgrading is that users without a browser-based home page now see the default home page in the Web Client instead of the Launch page. Users with an assigned browser-based home page will continue to see that home page.

Manage favorites in the Web Client

You can now save favorites in the Web Client, to provide quick access to commonly used items.

A favorites icon is now available in the right side of the gray task bar. To save a page or a document as a favorite, click the star icon so that the star shows as filled. Clicking the star again removes the item from favorites.



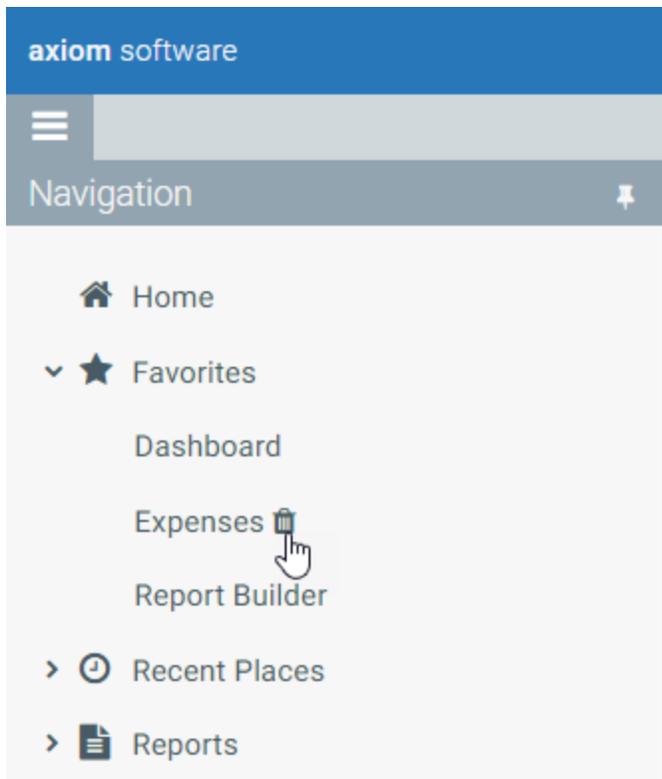
The screenshot shows the Axiom Software Web Client interface. The top navigation bar is blue and contains the 'axiom software' logo, a grid icon, a rocket icon, a bell icon, a user profile icon labeled 'AA', and the user name 'KaufmanHall'. Below this is a gray task bar with a hamburger menu, a funnel icon, a wrench icon, a star icon (highlighted by a blue arrow), and a question mark icon. The main content area displays an 'Expenses Overview' table for 'End of Q2 2018'. The table has columns for 'WorldRegion', 'Jan', 'Feb', 'Mar', 'Q1 Total', 'Apr', 'May', and 'June'. The data is as follows:

WorldRegion	Q1				Q2		
	Jan	Feb	Mar	Q1 Total	Apr	May	June
▶ Asia	\$802,424	\$578,026	\$731,392	\$2,111,842	\$684,279	\$622,209	\$813,543
▶ Corporate	\$2,628,929	\$2,682,378	\$2,728,675	\$8,039,982	\$2,957,031	\$2,653,844	\$2,740,958
▶ Europe	\$49,273	\$127,166	\$49,578	\$226,016	\$45,359	\$49,057	\$55,112
▶ North America	\$5,189,167	\$4,728,858	\$4,873,126	\$14,791,151	\$4,392,051	\$4,241,241	\$2,964,176

Favorites icon in Task Bar

Any document or page saved as a favorite now shows in your favorites list, available in either the Navigation panel or in the default home page. Web favorites are saved using the title text that shows in the browser tab. Currently, it is not possible to edit this name in the Web Client (however, it can be edited in the Desktop Client if desired).

You can also now delete favorites directly from your favorites list, in either location. If you hover your cursor over the favorite name, a trash icon displays next to the name. Click the icon to delete the item from your favorites list.



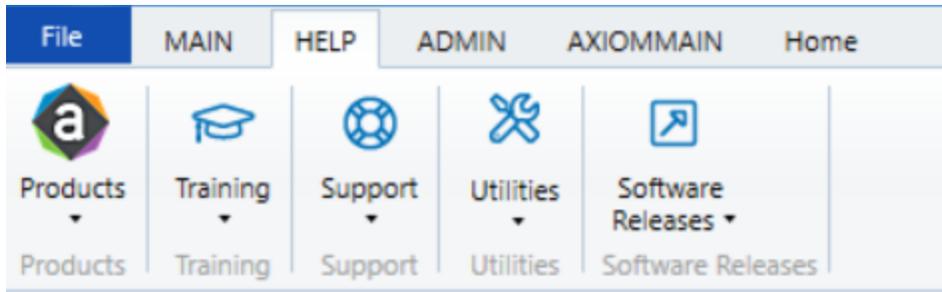
Deleting a favorite from the list

If the target document or page for an existing favorite is deleted, the favorite is not automatically deleted. If you try to use the favorite, you are informed that the document or page cannot be found. In this case you must manually delete the favorite.

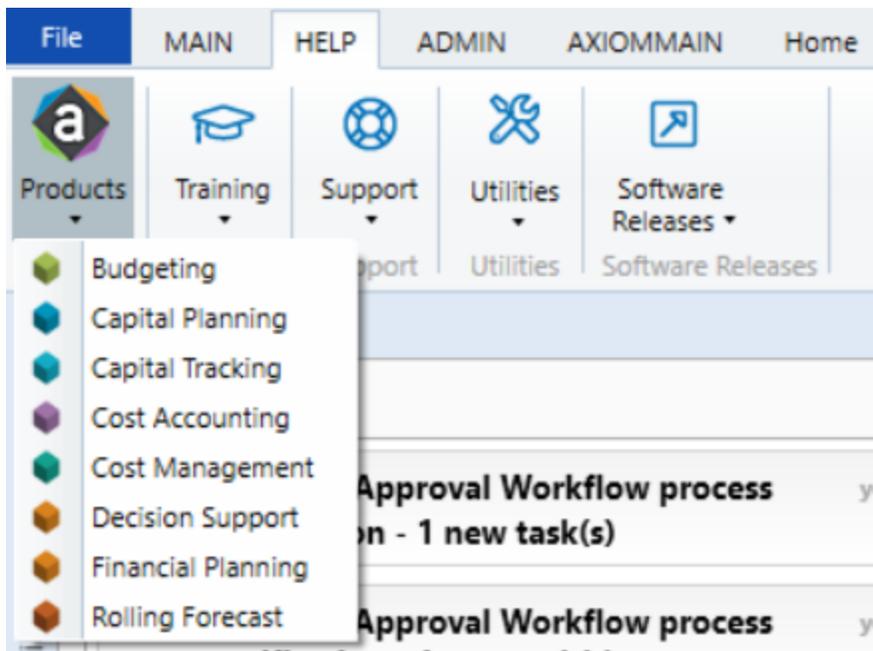
Online help, documents, and videos

Axiom Healthcare Suite products now display a new Help ribbon tab that allows you to access:

- Online help
- Training materials
- Support website
- Utilities
- Software release information



From the Help tab, click the Products button, and then click the appropriate product help.



This website provides a one-stop-shop for all information, instructions, and training materials related to Axiom Healthcare Suite products. The site includes help topics grouped together using a table of contents menu on the left side of the screen. You can perform searches from within any topic, and the ability to access and download documents and view training videos.

- What's New
- Getting Started
- ASSUMPTIONS
 - Working with drivers
 - Assumptions and Configuration drivers
 - Global drivers
 - Expense drivers
 - CDM drivers
 - Labor drivers
 - Provider drivers
 - Revenue drivers
 - Statistics drivers
 - Setting GL Payroll mapping
 - [FS 2497] Setting variance thresholds
- FILE GROUPS
 - Working with file groups
 - Working with file group aliases
 - Setting the fiscal year
 - Accessing file groups
 - Updating the 2019 file group
 - Creating and processing plan files
 - Deleting file groups
- BUDGETING/FORECASTING
 - Budget plan files

Axiom Budgeting and Performance Reporting Help



Welcome to Kaufman Hall's Axiom Software Suite—sophisticated, flexible budgeting and performance management tools to model the finances of any facility-based operation as well as generate comprehensive projections and what-if scenarios to support multi-year financial planning.

Using the software, you can evaluate proposed capital investments, establish short- and long-term profitability targets, and/or quantify the impacts of operational or market strategies. Axiom Budgeting and Performance Reporting primarily focuses on developing annual department/group-level budgets, tracking monthly/weekly variances, and management reporting based on budget data and key performance indicators.

This Help website provides information on how to use the Axiom Budgeting and Performance Reporting, such as configuring drivers, creating budgets, running reports, and other user and administration features.

Use the search box above to find help on a particular topic, or navigate through the Help website using the table of contents menu on the left side of the page.

Latest Updates

Version 2018.3 is now available! This release includes several new features and enhancements.

See [What's new](#) for more information.

Quick Links



Documents



Tutorial Videos



Support

Issues resolved in 2018.3

The following table lists the resolutions for issues addressed in 2018.3, released on September 24, 2018:

Issue Description	Resolution
PFB-05291 - Urgent - Security Admin Role File Processing not Activated [TFS 11184]	Symptom: Unable to process security update utility. Resolution: Corrected in a prior release.
PFB-06560 -DMU dropping leading zeros [TFS 25787]	Symptom: There are instances where clients use numeric userIDs, sometimes with preceding zeros. In the DEPT dimension most/all fields for users are strings. However, if you open the Dimension Maintenance Utility, it defaults to no formatting and therefore handles these values as if General format and strips away the preceding zeros. If anything is updated using the utility it will update the DEPT table with the now invalid userID. Resolution: Corrected by updating the Dimension_Maintenance tab Updated calc method column C from General to Text.

Manual setup instructions

There are no manual setup or configuration steps required for this release.

Known issues

There are no known issues in this release.