Release Notes
Axiom Comparative Analytics
Version 2019.1

KaufmanHall
AXIOM

KaufmanHall

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Contents

Summary

Kaufman Hall is pleased to announce the 2019.1 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

When upgrading to Axiom Comparative Analytics 2019.1, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, driver files, 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.
- 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.

New features summary

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

Comparative Analytics accessibility

If you have a Comparative Analytics license, you can now find a link to the application in the application menu.
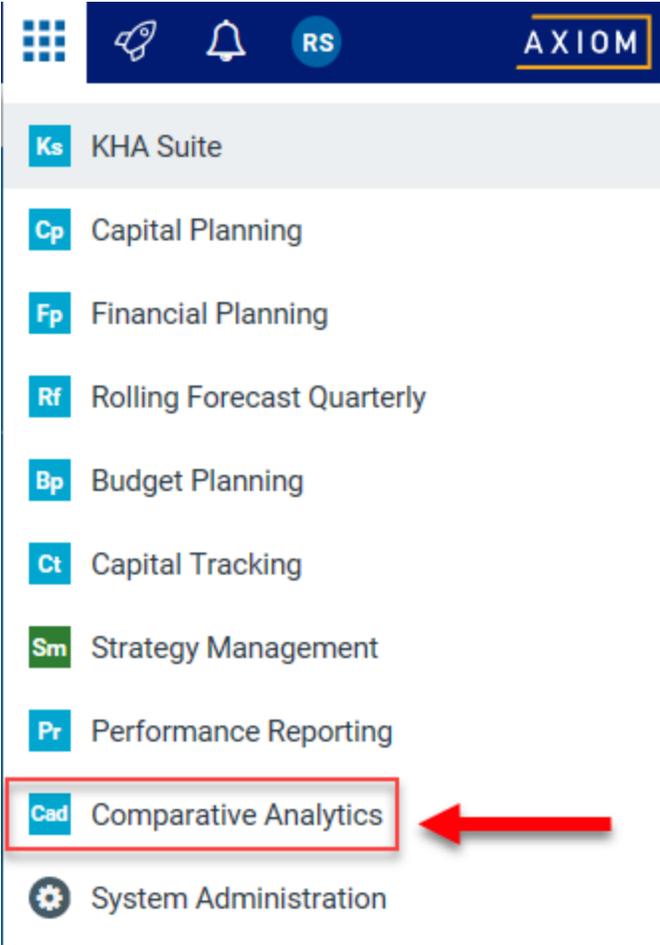
Entity Performance dashboard

We added the Entity Performance dashboard to provide you with analytics on your entities in the areas of profitability, volume, revenue, and expense. You can access the dashboard from the Navigation menu or from the Comparative Analytics home page.

> **NOTE:** Only users with the Entity role will have access to this dashboard.
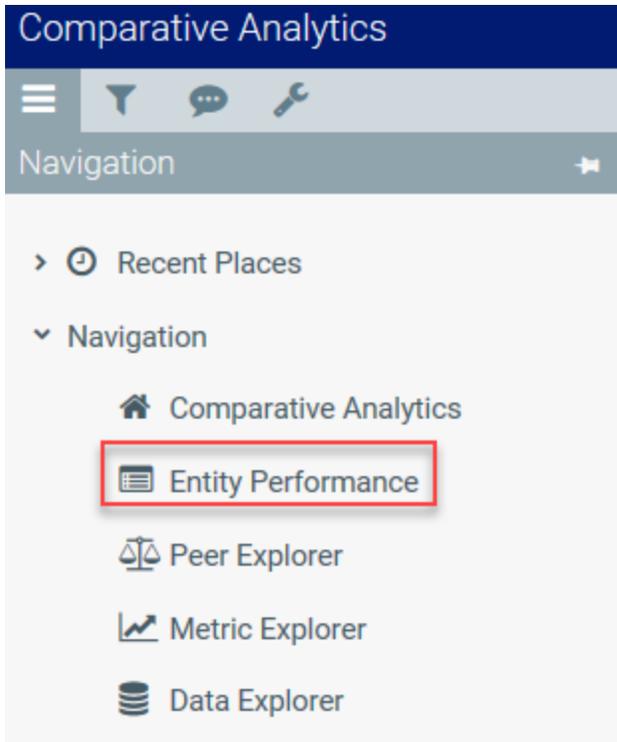
Use the Show toggle at the upper-right of the dashboard to switch between percentages and amounts.

To switch between metric areas, click the tabs at the top of the dashboard.

Entity Performance - Volume

Period: **Nov - 2018** | Variance Threshold: **-5%**

Profitability	Volume	Revenue	Expense	Other

		Adjusted Dis
Entity Desc ↑	**Bud Var**	**MoM**
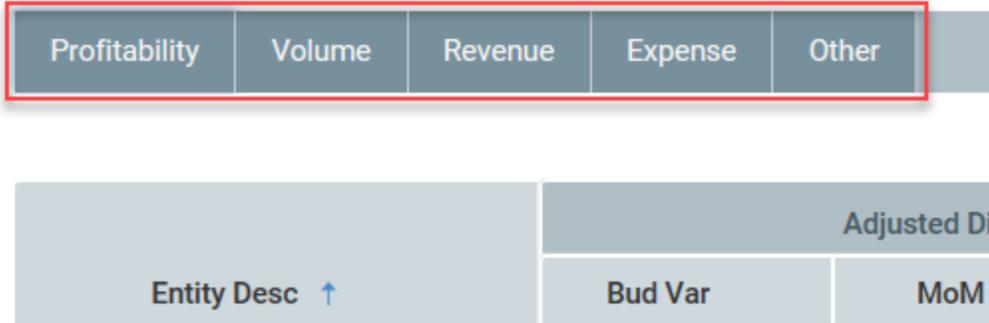
Click the Filter icon to select an entity, set the variance threshold, or change the period. The variance threshold is set to -5% by default. This means that the system is looking for and indicating metrics with an unfavorable variance of 5% until you change the variance threshold setting.

If you set the variance threshold to a negative percentage, the system will only display unfavorable variances. If you set the variance threshold to a positive percentage, the system will only display positive variances. If you set the variance threshold to 0%, the system will not display any variances.

Comparative Analytics

Filters

Entity KHAStandardClass

Choose a value for KHAStandar ▼ ✖

Set Variance Threshold

-30% -18% -6% 6% 18% 30%

Change Period

Nov - 2018 ▼ ✖

Apply   Clear All   Cancel
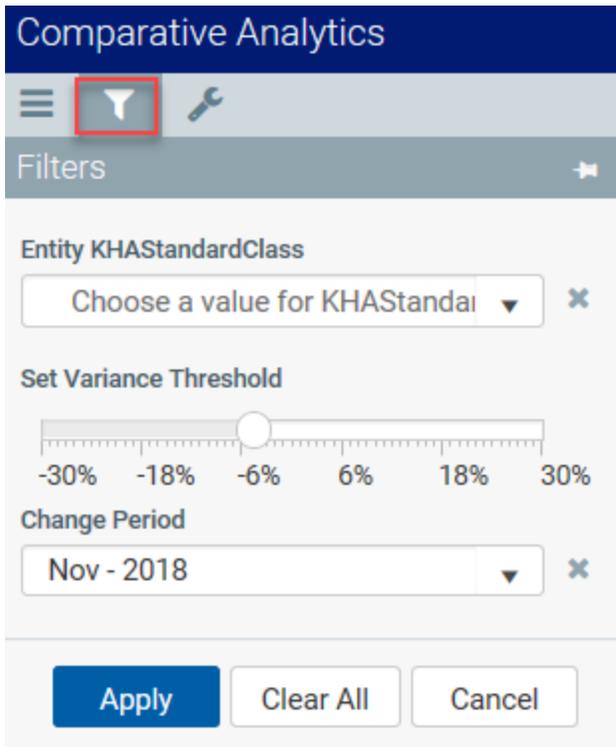
The metrics displayed in the Entity Performance dashboard link to Metric Explorer dashboard. This allows you to drill-down into greater detail on individual metrics and utilize the graphing functions available on the Metric Explorer.

To access the detail of an individual metric:

1. Hover your cursor over the metric.

2. Click the magnifying glass icon that displays.