



2016.4 HEALTHCARE ANNOUNCEMENT

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LAST UPDATE: 12/19/2016 for Version 2016.4 Patch 2

Summary

Kaufman Hall is pleased to announce the 2016.4 release of the Axiom Healthcare Products. Each product release provides new features, enhancements, and configuration options for your planning processes and analytic needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

IMPORTANT: Before upgrading to version 2016.4, review the product release notes for each product to understand any important technical changes and upgrade considerations.

Summary of Upgrade Process:

1. **Review product release notes** – Review the release notes for each product to familiarize yourself with the latest features and functionality.
2. **Schedule an installation date** – Contact support@kaufmanhall.com and a client service representative 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 update.
4. **Apply upgrade** – Arrange with your IT staff on an agreeable time for scheduled downtime to apply the program and product upgrade.
5. **Complete manual updates** – After installing the upgrade, complete the manual setup per the release notes.

Support:

As always, we appreciate your support of Kaufman Hall and look forward to continuing to meet your financial management needs. If you have questions regarding your annual upgrade, please contact Kaufman Hall Software Support at **1-888-KH-ENUFF (888-543-6833)** or support@kaufmanhall.com.

Training:

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

- Self-help videos
- Recorded webinars
- Virtual training courses
- Classes in our Skokie office

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

Upgrade Considerations

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

Product	Considerations
Axiom Platform	Upgrade at any time
Budget Planning	In an active Budget cycle: Wait to upgrade Not in an active Budget cycle: Upgrade
Performance Reporting & Productivity	Upgrade at any time
Rolling Forecasting	Upgrade at any time
Financial Planning	Upgrade at any time
Cost Management	Upgrade at any time
Capital Planning & Tracking	In an active Capital Planning cycle: Wait to upgrade Not in an active Capital Planning cycle: Contact your Implementation Consultant. Several manual steps need to be performed following the upgrade. This requires timing coordination with your implementation consultant.
Cost Accounting	Contact your Implementation Consultant. This upgrade requires data manipulation and process change. Your consultant will discuss the options with you.
Decision Support	Contact your Implementation Consultant. This upgrade requires data manipulation and process change. Your consultant will discuss the options with you.

Critical Consideration

The settings for the security roles cascade across all products due to the interdependence between products. Therefore, updating one product applies the security changes to *all installed products*. Please review the security related changes in the following section *before* applying this update.

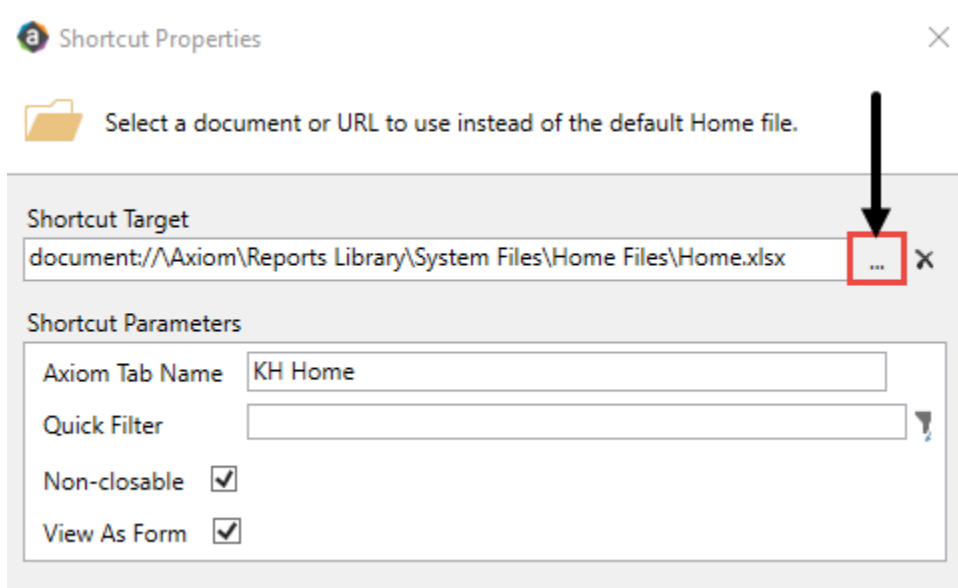
Home Page

Performance improvements have been made to the web-based home page. This home page allows you to add announcements at both the suite and the individual product levels. Members assigned Product Admin roles can add announcements and calendar entries.

For organizations with a large number of concurrent users that are still experiencing some performance issues with the web-based home page, an alternative home page has been added. This alternative home page is a thin home page that maximizes performance and minimizes resources consumed.

To activate the alternate home page, if desired, do the following:

1. Go to **Security Manager**.
2. Select **ROLES**.
3. Select **<Everyone> Role**.
4. Select **Startup Tab**.
5. To change the home page, in the **Home Page** field, click (...).
6. In the **Shortcut Target** field, click (...).

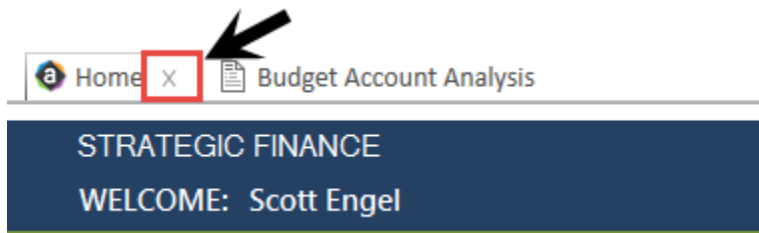


7. Go to **System Files\Home Files**.
8. Select **StandardHome.xlsx**, and click **OK**.

Modifying the Alternative Home Page for new announcements, contacts, or other items:

1. Security: You must belong to a Product Admin role.
2. Launch any Axiom file or report.

3. To close the Home page, click **X** on the **Home** tab. (Note: This is only closing your session.)



4. Go to **System Files > Home Files**, and launch **StandardHome.xlsx**.
5. Edit as needed. You can insert rows, copy and paste, and perform other Excel-like functions.
6. Save your changes.
7. Log out and log back in to display your newly edited Home page. All other users will view the additions the next time they log in.



Security Updates

As stated in the previous section, regardless of which product you select for this upgrade, the *security changes will apply to all installed products*. Therefore, it is important that you assess the impact of these changes *before* you apply this upgrade to any product.

General

Administer locked items is now available for all Product Admin roles. Prior to this update, only users with the Administrator checkbox selected had access to the Locked Items options. With this upgrade, all product admin members will have access to this feature.

Budget Planning

The Budget Analyst role read/write access to budget plan files outside of Process Management has been resolved. Members of this role will now have read/write permissions to Budget Plan files.

The Budget Analyst role was verified with the Budget Admin role to ensure both roles had consistent rights within the reporting areas of the product.

Performance Reporting

The Analyst role was verified with the Product Admin role to ensure both roles had consistent rights within the reporting areas of the product.

Rolling Forecasting

New Role: Rolling Forecast Analyst. This role provides members with the ability to develop reports, edit rights to both standard reports and utilities, and support end-users with plan file needs with 24/7 access to plan files outside of workflow.

To leverage this new role: Assign to the member(s). If they are already a member of an active Rolling Forecast Role, recommend removing the former role when adding the new role. A member should not belong to more than one Rolling Forecast Role (Admin, Analyst, User).

Cost Management

No changes.

Cost Accounting

Updated both the Admin and User roles to account for the structural changes and asset additions with the release of 2016.4.

Decision Support

Updated both the Admin and User roles to account for the structural changes and asset additions with the release of 2016.4. Upon upgrade to this version, you may need to update your existing Decision Support Security filters. This will be discussed with you during the upgrade process.

Capital Planning and Capital Tracking

CP User Role not having access to CP 2018 File Group has been resolved.

Financial Planning

No changes.

Additional Security Considerations

The security updates stated above only impact the standard security roles delivered with the product(s). If you have cloned or created any personalized roles, you need to make adjustments, as needed. The **Administer Locked Items** checkbox is in the **Permissions** tab of the **Security Manager**. Select this checkbox for all Admin roles so that they can leverage this feature.

Additionally, please take this opportunity to review each user that has the **Administrator** checkbox selected. The **Administrator** checkbox selected for any user provides unrestricted access to the *entire* suite of products, regardless of roles assigned—this includes features and data. We recommend that you limit who you assign this option to. For any user with the **Administrator** checkbox selected, deselect it. Verify that the user has been assigned the proper roles and that the remaining security (Data filter and Plan file filter) has been applied, as needed.