

KaufmanHall
axiom software



Axiom Healthcare Suite 2017.2

Release Notes

Last Updated: 8/8/2017

KaufmanHall

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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: Review the release notes for each product licensed by your organization prior to upgrading.

Summary

Kaufman Hall is pleased to announce the 2017.2 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, review any manual setup steps needed to enable features for this version. For more information, see [Manual setup instructions](#) in this document.

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.

When upgrading to the 2017.2 version of Axiom Healthcare Suite, 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.

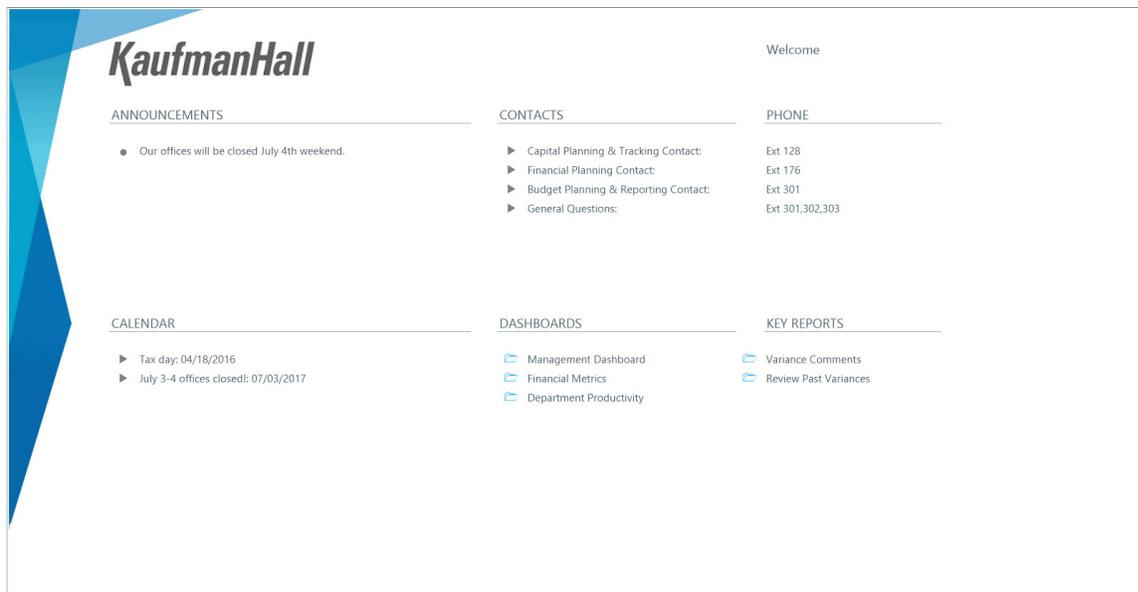
New features summary

This section includes a summary of the new or updated features for this release:

► Excel-based home page

The home page has been redesigned in Excel so that you can now use tables to easily and quickly communicate information to your organization. You can display announcements, contacts, calendar events, dashboards, and also key reports.

NOTE: With this release, the Everyone role in Security Manager was updated so that this becomes the home page by default.



► Update existing plan files: Released a new utility to apply calc method fixes as needed to plan files after creation

This utility assists you or support in correcting calculation methods after the plan file has been built and released. This utility is explained in the Axiom Platform online help.

► Web-based platform enhancements

A significant focus this release was to enable the platform to support HTML5 (web) features and functions. This lays the ground work for many exciting new features and functions to come in future releases. Web features provide not only an enhanced user experience but improved performance.

► Planning integration

Three feature sets are now available to enable integration between several planning products:

- **Budget Planning to Financial Planning**

You can now map and aggregate historical or budget data from Axiom Budget and Performance Reporting and populate / update the corresponding node in Axiom Financial Planning. For example, if you have ten models with three nodes each, you can use this utility to update the YTD values without having to manually enter in the data. You can also update Year 1, Year 2, and/or Year 3 of each planning node.

- **Rolling Forecast to Financial Planning**

You can now map and aggregate historical or forecasted data from Axiom Rolling Forecasting and populate / update the corresponding nodes in Axiom Financial Planning. This allows you to update any combination of Years 1 – 5 of your financial plan.

- **Cost Management to Budget Planning**

You can now integrate each initiative expense reduction to Axiom Budgeting and Performance Reporting. Data is aggregated to the account level to a new transparent calc method. This provides an excellent approach to keeping your operating plans in sync with your budget planning process.

▶ **Auto-hide Control Sheet**

The Control Sheet now auto-hides for all users.

▶ **Confirmation message displays when moving folders in Axiom Explorer**

When moving a folder in Axiom Explorer, a confirmation message now displays to make sure you actually want to move the folder.

▶ **Support for Microsoft Windows Server 2016**

Microsoft Windows Server 2016 is now officially supported for use with the Axiom Application Server, the Axiom Scheduler Server, and the Axiom Cloud Integration Service.

▶ **Minimum Microsoft Explorer version supported**

The minimum supported version of Microsoft Internet Explorer is now Internet Explorer 11.

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 to 2017.2 Platform as soon as possible.
Axiom Budgeting and Performance Reporting	Upgrade only when not in an active budget cycle.
Axiom Rolling Forecasting	Upgrade anytime.
Axiom Financial Planning	Upgrade when not in cycle.
Axiom Cost Management	Upgrade prior to next cycle.
Axiom Capital Planning and Capital Tracking	Upgrade when not in cycle.
Axiom Cost Accounting and Decision Support	Contact your Kaufman Hall Implementation Consultant to discuss your upgrade options.

Known issues resolved

The following tables list the resolutions for known issues addressed in this release:

Issue Description	Resolution
Issue with 2017.1.0 package updating the Financial Planning user role (2017.2) (TFS-12123)(PFB-05382)	Corrected by changing the 2017.2 EID to match 2016.4 and prior. The install now occurs without error.
An error displays when trying to refresh the Dimension Maintenance utility after deleting a client's custom column from the Dept dimension table. (TFS-12035) (PFB-05449)	Resolved with Platform v2017.1.25.153.

Manual setup instructions

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

Operating instructions

This section includes instructions on how to use the new and updated features for Axiom Healthcare Suite for release 2017.2.

Configuring the home page

The Axiom Healthcare Suite home page is Excel based and table-driven, with each section populated from table records. You do not need to modify the file itself, but instead you use a template to make your changes.

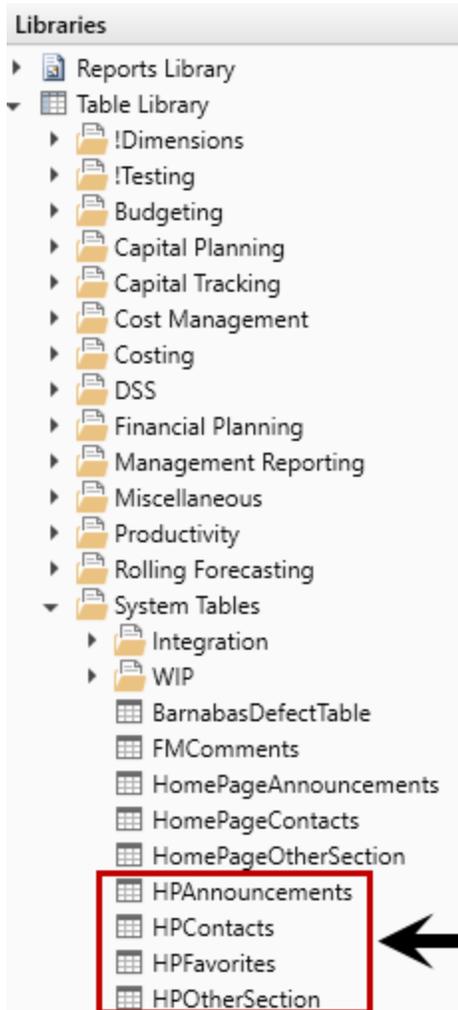
NOTE: To update the home page tables, users must be assigned the Suite Admin role since the tables may contain content that impacts all Axiom Healthcare Suite products.

The home page is comprised of the following sections:

Section	Description
Announcements	Post up to 8 announcements
Calendar	Post up to 8 calendar items
Contacts	Post up to 8 contacts
Dashboards	Post up to 8 dashboard links
Key Reports	Post up to 8 key report links

To configure the home page:

1. In the Explorer task pane, in the Libraries section, click Table Library > System Tables.



2. Double-click the following tables to configure the corresponding section of the home page. The following tables outline the rules for each data field.

NOTE: Only enter information in the fields listed in these tables.

▶ HPAnnouncements (Announcements)

<i>Integer</i>	<i>String</i> 50	<i>String</i> 50	<i>String</i> 50	<i>String</i> 50	<i>String</i> 60	<i>DateTime</i>
AnnounceID	Product	Type	Recipien	Creato	Description	CalendarDate
1	Global	Announcement			Under Construction. Please Ignore the dust ..	
1	Global	Calendar			sample calendar	3/1/2016 12:00 AM
2	Global	Announcement			Length Test 15 Length Test 15 Length Test 15 Length Test 15	
2	Global	Calendar				
3	Global	Announcement				
3	Global	Calendar				
4	Global	Announcement				
4	Global	Calendar				
5	Global	Announcement				
5	Global	Calendar				

Data Field	Parameters
AnnounceID	Use number 1 – 8 for the order to display the announcement.
Product	Use Global.
Type	Use Announcement.
Description	Type a description of the announcement. (Max length of 60 characters)

▶ HPAnnouncements (Calendar)

<i>Data Type</i> <i>String Length</i>	<i>Integer</i>	<i>String</i> 50	<i>String</i> 50	<i>String</i> 50	<i>String</i> 50	<i>String</i> 60
Description	AnnounceID	Product	Type	Recipien	Creato	Description
Delete Row						
	1	Capital Planning	Calendar			
	1	Financial Planning	Announcement			sample announcement
	1	Financial Planning	Calendar			
	1	Global	Announcement			Our offices will be closed July 4th weekend.
→	1	Global	Calendar			sample calendar
	2	Budgeting	Announcement			
	2	Budgeting	Calendar			
	2	Capital Planning	Announcement			
	2	Capital Planning	Calendar			
	2	Financial Planning	Announcement			
	2	Financial Planning	Calendar			
	2	Global	Announcement			
→	2	Global	Calendar			July 4th - Offices closed!
	3	Budeeting	Announcement			

Data Field	Parameters
AnnounceID	Use number 1 – 8 in the order to display the calendar item.

Data Field	Parameters
Product	Use Global .
Type	Use Calendar .
Description	Type a description of the calendar item.
CalendarDate	Enter the date and time for the calendar item.

► **HPContacts (Contacts)**

Data Type	<i>Integer</i>	<i>String</i>	<i>String</i>	<i>String</i>
String Length		50	50	15
Description				
Delete Row	ProductID ▼	ProductDescription ▼	Contact ▼	ProductRef ▼
	1	Capital Planning & Tracking Contact:	Ext 128	Global
	2	Financial Planning Contact:	Ext 176	Global
	3	Budget Planning & Reporting Contact:	Ext 301	Global
	4	General Questions:	Ext 301,302,303	Global

Data Field	Parameters
ProductID	Type a number 1 – 8 in the order to display the contact item.
ProductDescription	Type a contact description (description or name).
Contact	Type contact information (name or phone number).
ProductRef	Type Global .

► HPOtherSection (Dashboards)

Data Type String Length	Integer	String 10	String 100	String 30
Description	Other ID	Document Type	Document Path	Friendly Name
Delete Row	HPOtherID	Section1	Section2	Section3
	1	Report	\Axiom\Reports Library\Management Reporting\Analysis\MultiYear Statistic Review.xlsx	Variance Comments
	2	Report		Review Past Variances
	11	Dashboard	\Axiom\Reports Library\System Files\Home Files\Management Dashboard.xlsx	Management Dashboard
	12	Dashboard	\Axiom\Reports Library\System Files\Home Files\Financial Metrics.xlsx	Financial Metrics
	13	Dashboard	\Axiom\Reports Library\System Files\Home Files\Productivity- BiWeekly-SingleDept.xlsx	Department Productivity

Data Field	Parameters
HPOtherID	Type number 1 – 8 for the order to display the dashboard item. NOTE: Because this table allows you to include dashboards and reports, the number you assign to a dashboard cannot be the same number used for a report. In the example above, the HPOtherID 1 is assigned to a report, so you cannot assign this number to a dashboard.
Section1	Type Dashboard .
Section2	Enter the document path by copying it from Explorer and pasting it into this field.
Section3	Type a name for the dashboard to display on the home page.
ProductRef	Type Global .

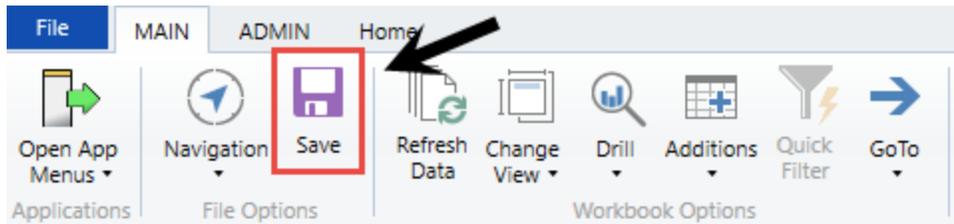
► HPOtherSection (Key Reports)

Data Type String Length	Integer	String 10	String 100	String 30
Description	Other ID	Document Type	Document Path	Friendly Name
Delete Row	HPOtherID	Section1	Section2	Section3
	1	Report	\Axiom\Reports Library\Management Reporting\Analysis\MultiYear Statistic Review.xlsx	Variance Comments
	2	Report		Review Past Variances
	11	Dashboard	\Axiom\Reports Library\System Files\Home Files\Management Dashboard.xlsx	Management Dashboard
	12	Dashboard	\Axiom\Reports Library\System Files\Home Files\Financial Metrics.xlsx	Financial Metrics
	13	Dashboard	\Axiom\Reports Library\System Files\Home Files\Productivity- BiWeekly-SingleDept.xlsx	Department Productivity

Data Field	Parameters
HPOtherID	Type a number 1 – 8 in the order to display the key report. NOTE: Because this table allows you to include both dashboards and reports, the number you assign to a report cannot be the same number used for a dashboard. In the example above, the HPOtherID 11 is assigned to a dashboard, so you cannot assign this number to a report.
Section1	Type Report .
Section2	Enter the report file path by copying it from Explorer and pasting it into this field.

Data Field	Parameters
Section3	Type a name for the key report to display on the home page.
ProductRef	Type Global.

3. After making changes to the appropriate table, in the **Main** ribbon tab, click **Save**.



IMPORTANT: To see the changes you made to the home page, you must log out and log back in to the system.

Known issues

Issue Description	Explanation
<p>Existing Excel home page settings from previous versions replaced with new home page.</p>	<p>Symptom: When upgrading to 2017.2, any existing settings configured for the Excel home page will be replaced with the newly updated Excel-based home page. This also applies to any product-based settings used in the forms version of the home page.</p> <p>Explanation: Recreate the content, as applicable.</p>