



## **Axiom Healthcare Suite 2017.3**

### **Release Notes**

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# *KaufmanHall*

5202 Old Orchard Rd. Suite N700  
Skokie, IL 60077  
(847) 441-8780  
(847) 965-3511 (fax)  
[www.kaufmanhall.com](http://www.kaufmanhall.com)

Support email: [support@kaufmanhall.com](mailto:support@kaufmanhall.com)

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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 2017.3 release of Axiom Cost Accounting. 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](mailto: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](mailto: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](http://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 2017.3 upgrade before applying any 2017.3 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 2017.3 before the first product upgrade.

When upgrading to the 2017.3 version of Axiom Healthcare Suite, 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 its 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 summary of the new or updated features for this release:

## ► Certain Axiom Healthcare Suite product-controlled assets are now read-only

The following items are now read-only if they are installed by a product package and if they are configured to be replaced on product installation:

- Table columns
- Reports Library documents
- Folders (except folders in file groups)

Read-only reports can still be copied to create new versions, if needed. For folders, the read-only designation means that the folder cannot be moved, deleted, or renamed. Users can still have read/write access to the folder for purposes of creating new reports in that folder.

## ► Validated values folder in Dimension Maintenance Utility

For those columns that require you to enter validated values, a folder icon now displays next to the column. Double-click the folder to choose from the list of values, or manually update the cell directly, or you can copy and paste the value(s) from similar cells.

This change provides a more efficient means to make bulk additions or changes to any of the dimensions. You can now copy blocks of content from similar elements to the new elements versus selecting the attributes one at a time.

Maintenance

Dimension : PAYTYPE

DataSet filter : (DataSetName IN ('General','BP') OR DataSetName = '')  
(\*) the column is duplicate. Only the first instance will be saved back

General					
PAYTYPE	Description	PaySummary	PayDetail	FTE	
P0001	Regular	Prod	Regular	Yes	
P0004	Paid Time Off	NonProd	NonProd	Yes	
P0006	Sick Pay	NonProd	NonProd	Yes	
P0008	Jury Duty	NonProd	NonProd	Yes	
P0009	Education	Prod	Regular	Yes	
P0011	Payroll Adjustments	Prod	Regular	Yes	
P0014	Personal Development	Prod	Regular	Yes	
P0015	Med Tech Pay	Prod	Regular	Yes	
P0016	Extra Shift	Other	Other	No	
P0019	Education	Prod	Regular	Yes	
P0020	Call Pay	Other	Other	No	
P0022	Call-Back	Prod	Overtime	Yes	
P0024	Sick Pay	NonProd	NonProd	Yes	
P0028	PDO Cash-In	Other	Other	No	
P0030	Additional Pay	Other	Other	No	

When adding a new dimension record, if you do not select **Yes** in the **Save ?** cell for the new element, it now displays **No** with a red background as a reminder that you need to change the toggle before saving. If you do not change the Save toggle, that row will not be saved.

## Add New Dimension Element

Dimension : PAYTYPE

DataSet filter : (DataSetname IN ('General','BP') OR DataSetName = '')  
(\* the column is duplicate. Only the first instance will be saved back)

Save ?	PAYTYPE	Description
No	PayDate	
No	Sabbatical	
No		

For more information, see "Viewing and editing a dimension" and "Adding a dimension record" in the *2017.3 Dimension Maintenance Utility Administrator's Guide*.



# 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 Cost Management	Axiom Cost Management is not included in the 2017.3 Axiom Healthcare Suite release.
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 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 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.

# Issues resolved

The following tables lists the resolutions for issues addressed in 2017.3, released on November 20, 2017:

Issue Description	Resolution
PFB-05485 - Dimension Maintenance Utility [TFS 12534]	<p><b>Symptom:</b> The KHABgtCode column on the Add_New_Dimension tab is validated, only allowing you to select from existing job codes. As a result, this does not allow you then to select the job code you are adding.</p> <p><b>Resolution:</b> Corrected by removing the validation from the Add_New_Dimension tab for KHABgtCode.</p>

# 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.