KaufmanHall
axiom software

Axiom Healthcare Suite 2018.4

Release Notes

Last Updated: 12/17/2018

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Contents

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 2018.4 Release Notes** as well as the release notes for each product licensed by your organization.

Summary

Kaufman Hall is pleased to announce the 2018.4 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:

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 2018.4 upgrade before applying any 2018.4 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 2018.4 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 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 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.
Comparative Analytics	There are no required upgrade considerations with this release.
Axiom Contract Management	Contact your Kaufman Hall Implementation Consultant to schedule an installation.
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 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.
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 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.

Product	Considerations
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 Strategy Management	Contact you Kaufman Hall Implementation Consultant to schedule an installation.

New features summary

There are no new features specific to the Axiom Healthcare Suite for version 2018.4, but we recommend that you review the **Axiom Software 2018.4 Release Notes** for information regarding new features at the Axiom Software level.

Issues resolved for 2018.4

The following table lists the resolutions for issues addressed in 2018.4, released on December 17, 2018:

Issue Description	Resolution
PFB-05706 - Everyone role should NOT have OTIS access set to READ for the Dimension table type [TFS 15441]	**Symptom:** The Everyone role has Dimension table set to Read for Open table in Spreadsheet (OTIS). **Resolution:** Corrected by adjusting the OTIS access for the Everyone role to "No Access" for Dimension table type.

Manual setup instructions

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

Known issues

The following table lists the known issues for this release:

Issue	Description
DMU does not warn a user when another user has it open [TFS 30261]	**Symptom:** If a user has the Dimension Maintenance Utility open and another user opens it, the system does not display a warning to the user that the utility is already open. The system should display a warning and not allow the user to save. **Resolution:** This issue will be addressed in a future release.