



Release Notes  
Axiom Healthcare Suite  
Version 2019.4



KaufmanHall

AXIOM

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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:** Prior to upgrading, make sure to review the **Axiom Software 2019.4 Release Notes** as well as the release notes for each product licensed by your organization.

# Summary

Kaufman Hall is pleased to announce the 2019.4 release of Axiom Budgeting and Performance Reporting. 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.

**NOTE:** For the most updated release notes, view/download them from Axiom Help. After logging into your Axiom product, click the Main ribbon tab, and then click **Online Help > Budgeting and Performance Reporting**. At the top of the home page, click **Release Notes**.

Summary of the upgrade process:

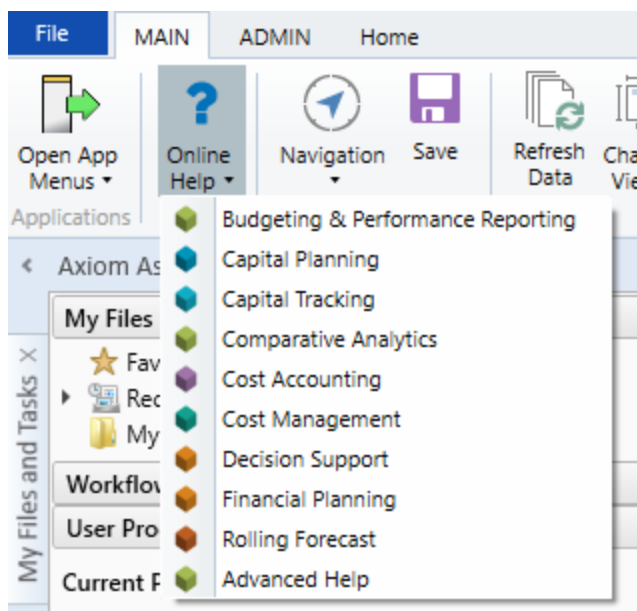
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact [support@kaufmanhall.com](mailto:support@kaufmanhall.com) to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
  - Desired Axiom Software platform version.
  - Desired Axiom for Healthcare product and version.
  - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Kaufman Hall can do this.
  - Propose an approximate two-hour downtime window when Kaufman Hall can apply update(s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Kaufman Hall).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

## Help and Training

Kaufman Hall provides world-class resources at your fingertips directly within the Axiom Software system. Axiom Help provides topics, knowledge base articles, documents, webinar/training announcements, and videos to guide you through managing your system. To access these resources, do any of the following:

- **Online help** - From the Main or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window.

**NOTE:** The online help will only open for products you are licensed to use.



- **Contextual help** - Form/web-enabled features include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right corner of the screen. For more detailed information, open Axiom Help by clicking **Open Help** at the top of the contextual help dialog.



### Escalating to Axiom Support

As always, we appreciate your commitment to Kaufman Hall. If you have any questions about your upgrade, please contact us by logging into Axiom, clicking **Help**, then clicking **Support**.

# 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 2019.4 upgrade before applying any 2019.4 product upgrades.** The Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2019.4 before the first product upgrade.

When upgrading to Axiom Healthcare Suite Version 2019.4, 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.
Axiom 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.

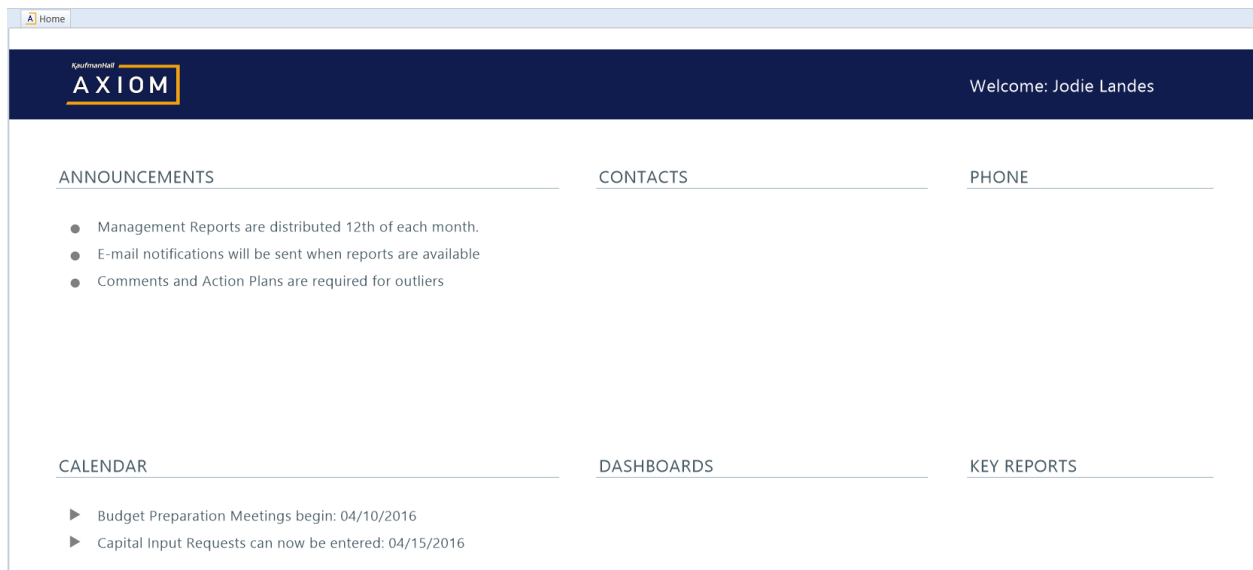
Product	Considerations
Axiom Rolling Forecasting	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Strategy Management	There are no required upgrade considerations with this release.

# New features summary

This section includes a description for each new feature included in this release of Axiom Healthcare Suite.

## ► Redesigned home page for Windows and Excel Clients

The default home page used in the Windows and Excel Clients has been updated with current logo and a new look-and-feel.



# Issues resolved for 2019.4

The following table lists the resolutions for issues addressed in 2019.4, released on December 16th, 2019:

Issue	Description
PFB-08017 - Default Data Bloat [TFS 39582]	<p><b>Issue:</b> The KH Update task failed due to a defect in the default data post upgrade workbook due to a related defect in PFB-07804. As we attempted to modify default data as part of a workaround related to the aforementioned PFB, the default data did not open in a timely fashion.</p> <p><b>Resolution:</b> This issue was fixed in version 2019.3</p>
PFB-08267 - Remove the HELP ribbon due to dead-end buttons	<p><b>Issue:</b> The Help ribbon was confusing to clients and the Support site where some of the buttons link to is being decommissioned.</p> <p><b>Resolution:</b> Corrected by removing the Help ribbon tab and adding links to the online help to the Main and Admin ribbon tabs.</p>
Dimension Maintenance -Security utility needs to only return Enabled users to prevent errors about disabled admin users [TFS 23665]	<p><b>Issue:</b> When attempting disabling a user. the system displays a dimension maintenance security error.</p> <p><b>Resolution:</b> Corrected by updating the AQ filter to not allow disabled users to use the query.</p>

# Manual setup instructions

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