



Axiom Capital Planning and Tracking 2018.4

Excel Legacy - Release Notes

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Summary

Kaufman Hall is pleased to announce the 2018.4 release of Axiom Capital Planning and Tracking (Excel Legacy). 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:

- Self-help videos
- Recorded webinars
- Virtual training courses

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

Product upgrade notes

When upgrading to the 2018.4 version of Axiom Capital Planning and Tracking, 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 your 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 description for each new feature included in this release.

Asset Replacement Planning module

The Asset Replacement Planning module is a separate add-on utility to Axiom Capital Planning that allows you to easily manage and analyze the replacement or retirement of your organization's equipment and other assets.

NOTE: This module is not installed as part of the upgrade to 2018.4. Contact your Kaufman Hall Representative if you are interested in purchasing this module.

You can load your organization's existing assets and use the utility to rate values on each asset to help with the replacement process, and use it to report on your findings.

Project Summary															
2019 Asset Replacement Planning Process															
Filter: NONE															
Input additional filter criteria here (ex. ABR20xx.DEP1<13345)															
(*) Denotes Field Is Required for Save															
Facility	Tag Number	Equipment Type	Cost Center	Purchase Information			Equipment Life		Hours Per Day	Service History & Cost Data					
				Inservice Date	Acquisition Cost	Net Book Value	Expected Life	Age		Service Events	Annual Average Service Events	Past 12 Months Service Events	Total Service Cost	Avg Annual Service Cost	Past 12 Months Service Co
KH Health System	1054165	Computer Aided Detection Sys.	EHS Balance Sheet	4/29/2009	20,001	0	5	9.6	8	4	0	3	495	52	428
KH Health System	1054165	Electromyographs, EMG	EHS Balance Sheet	4/29/2009	20,001	0	7	9.6	8	4	0	3	495	52	428
KH Health System	1251695	Microtomes, Cryostat	EHS Balance Sheet	8/13/2010	4,001	0	7	8.3	12	1	0	0	0	0	0
KH Health System	1251713	Data Management Sys.	EHS Balance Sheet	9/21/2010	9,555	0	5	8.2	24	2	0	0	23	3	0
KH Health System	1251714	Data Management Sys.	EHS Balance Sheet	9/21/2010	9,555	0	5	8.2	24	2	0	0	23	3	0
KH Health System	1251769	Data Management Sys.	EHS Balance Sheet	9/21/2010	9,555	0	5	8.2	24	2	0	0	23	3	0
KH Health System	1251857	Monitoring Sys., Physiologic	EHS Balance Sheet	12/27/2007	2,800	0	7	10.9	24	1	0	0	0	0	0

With this module, you can manage:

- **Identification** - Track asset details such as the equipment type, manufacturer, model, quantity, etc.
- **Purchase Information** - Record in-service dates, acquisition cost, net book value, etc.
- **Equipment Life** - Track the age and expected life of the asset.
- **Service History and Costs** - Input service events, total service cost, and average service cost.
- **Clinical and Serviceability Assessments** - Configure and assign weights to assessment criteria.
- **Budget** - Evaluate estimated budget amounts for current and future services costs.

The system uses a weighted scoring system based on the assessment criteria you configure to generate a replacement score to help you determine when to replace or retire equipment.

Project Summary

2019 Asset Replacement Planning Process

Filter: NONE

Input additional filter criteria here (ex. ARP200a.DEPT=12345)

(*) Denotes Field is Required for Save

Facility	Tag Number	Equipment Type	Technology Initiative	Clinical Assessment Scores					Final Scores			Operational Service Only Budget *Estimate		
				Probable Clinical Impact Score	Probable Financial Impact Score	Technology Level Score	Safety Regulatory Risk Score	Technology Initiative Score	Replacement Index	Scored Fiscal Year	Last Saved Scored Fiscal Year	Current Annual Service Cost	Future Annual Service Cost	Yearly Variable
KH Health System	1054165	Computer Aided Detection Sys.	Somewhat Compatible (5)	2	0	11	0	5	25	Undetermined	Undetermined	0	0	0
KH Health System	1054165	Electromyographs, EMG	Somewhat Compatible (5)	2	0	11	0	5	31	Undetermined	Undetermined	0	0	0
KH Health System	1251695	Microtomes, Cryostat	Compatible / Not Applicable (0)	2	0	7	0	0	16	Undetermined	Undetermined	0	0	0
KH Health System	1251713	Data Management Sys.	Not Compatible (10)	8	12	7	0	10	47	Year 1	Year 1	266	266	0
KH Health System	1251714	Data Management Sys.	Not Compatible (10)	8	12	7	0	10	47	Year 1	Year 1	266	266	0
KH Health System	1251769	Data Management Sys.	Not Compatible (10)	8	12	7	0	10	47	Year 1	Year 1	266	266	0
KH Health System	1251857	Monitoring Sys., Physiologic	Compatible / Not Applicable (0)	0	0	14	0	0	24	Undetermined	Undetermined	0	0	0
KH Health System	1445735	Infusion Pumps	Not Compatible (10)	2	16	11	0	10	55	Year 2	Year 2	117	117	0

Improved plan file performance by batching queries

To help improve performance when opening plan files, the system now batches queries so that calls to the database can be made simultaneously. This allows queries not related to each other to run together, helping to speed up processing time.

Issues resolved for 2018.4

The following tables list the resolutions for issues addressed in 2018.4, released on December 17th, 2018:

Axiom Capital Planning

Issue Description	Resolution
PFB-06034 - Transfer of CP to FP not receiving in capitalized interest [TFS 18056]	<p>Symptom: The layout of the Cap_Project template in Financial Planning does not account for capitalized interest.</p> <p>Resolution: Corrected by adding new rows to include capitalized interest in the template.</p>
PFB-06567 - Picklist Yes or No problem in the CX Project Import utility [TFS 24396]	<p>Symptom: If you use Yes or No as picklist choices (Picklist01_01='No') and the Save selection is also set to Yes or No, then the formula chooses Picklist01Save.</p> <p>Resolution: Corrected by updating the corresponding formula.</p>
PFB-06756 - Template trimming off leading zeroes of USERID in Creator field of Variables tab [TFS 27566]	<p>Symptom: In the Variables template, if the USERID has leading zeroes (00012345), the GetData defined in cells AE175:AJ175 brings this value in as a number, trimming off the leading zeroes.</p> <p>Resolution: Corrected by creating a query to retrieve the correct value.</p>

Axiom Capital Tracking

Issue	Description
PFB-06582 - Capital Transfers overwriting transfers upon breaching 999 transfers [TFS 24822]	<p>Symptom: When capital projects exceeds 999 transfers, the system overwrites the transfers.</p> <p>Resolution: Corrected by updating formulas in several templates.</p>
PFB-06582 - Capital Transfers overwriting transfers upon breaching 999 transfers calc method fix [TFS 29841]	<p>Summary: The calc method is not correct for the Multiple Capital Transfer Utility. Column AS is different in the utility than it is in the calc method and does not return the correct result.</p> <p>Resolution: Corrected by updating the calc method and multiple formulas in the utility.</p>
PFB-06751 - Evaluator Scoring report not saving back [TFS 27007]	<p>Symptom: The Evaluator Scoring report does not save back to the database.</p> <p>Resolution: Corrected by updating several formulas in the report.</p>

Issue	Description
PFB-06898 - Different drop-downs for OP Ex vs Cap Ex for the GL accounts [TFS 28708]	<p>Summary: The Purchase Request line item includes a drop-down for Capital or Operating. When a user selects Capital, only those CAPACCT accounts marked with Capital display. However, when a user selects Operating, both Capital and Operating CAPACCT accounts display.</p> <p>Resolution: Corrected by adding a missing filter in the drop-down tag for the GL account when a user selects Operating.</p>
PFB-06907 - Dimension Update Report FG error [TFS 28751]	<p>Summary: When updating the Dimension Update reports, CAPACCT tab, I added a line and selected "SAVE". The system displays an error message that cell L7 on the Vendor tab was a problem.</p> <p>Resolution: Correcting the missing data in the CT_Templates table when the table is blank.</p>
PFB-06938 - CapProjectMaster{FY} formatting error on data lookup [TFS 29710]	<p>Summary: An error displays when a user opens any plan files with a numeric value in TextField02.</p> <p>Resolution: Corrected by fixing the format issue on the TextField02 data lookup.</p>

Issues resolved for 2018.4.1

No issues were addressed in either Axiom Capital Planning or Axiom Capital Tracking in 2018.4.1, released on January 7th, 2019.

Issues resolved for 2018.4.2

No issues were addressed in either Axiom Capital Planning or Axiom Capital Tracking in 2018.4.2, released on January 28th, 2019.

Issues resolved for 2018.4.3

The following tables list the resolutions for issues addressed in 2018.4.3, released on February 18th, 2019:

Axiom Capital Planning

Issue	Resolution
PFB-07206 - CPLegacy Duplicate Records in CPData due to batch AQs in template [TFS 31495]	<p>Symptom: During the initial project creation, there is a high probability that unit costs on the Capital20 sheet will save under the wrong account number, which should be determined by the SummaryInputs driver table. Next time the plan file is opened and saved, the system saves under the correct account number, but it leaves the incorrect account in the CPData table. As a result, any reporting on that particular CPData.CODE is doubled.</p> <p>Resolution: Corrected by updating the query batching order.</p>

Axiom Capital Tracking

Issue	Description
CT Legacy Purchase Request AQ Error [TFS 31946]	<p>Symptom: When a user with a complex security filter opens the form, no CAPREQ values are returned because of the filter in the query on the CAPREQ tab. The filter should be moved to the data filter.</p> <p>Resolution: Corrected by moving the filter from the start tag to the data filter for the query.</p>

Manual setup instructions

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

Known issues

Axiom Capital Planning

Issue Description	Resolution
Dimension Maintenance - CPREQ2015 does not have full access	<p>Symptom: The CapReq2015 dimension no longer has write access due to the change in security.</p> <p>Explanation: If this is an active file group (requests being added), you need to manually update security by doing the following:</p> <ol style="list-style-type: none">1. In the Security Manager, select the <Everyone> role.2. Click the Tables tab.3. Click Dimensions, and then select CapReq2015.4. Select the Full Access check box.5. Click Apply or Close.

Axiom Capital Tracking

There are no known issues with this release.

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2018.4 Release Notes** for additional known issues that have a suite-wide impact.