Axiom Capital Planning and Tracking 2018.4

Web System - Release Notes

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Summary

Kaufman Hall is pleased to announce the 2018.4 release of Axiom Capital Planning and Tracking . 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.

Facility	Tag Number	Equipment Type	Cost Center	Inservice Date	Acquisition Cost	Net Book Value	Expected Life	Age	Hours Per Day	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. ARP20xx.DEPT=12345)

(*) Denotes Field Is Required for Save

Facility	Tag Number	Equipment Type	Technology Initiative	Clinical Assessment Scores					Final Scores			Operational Service Only Budget "Estimat		
				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]	**Symptom:** The layout of the Cap_Project template in Financial Planning does not account for capitalized interest. **Resolution:** Corrected by adding new rows to include capitalized interest in the template.
PFB-06321 - Web Financial Statements report does not exclude items designated Exclude from NPV (TFS 213590	**Symptom:** The NPV and IRR for the Financial Statements does not take into account the new driver file setting that was introduced in 2017.2 to Exclude from NPV specifically designated CODE items. **Resolution:** Corrected in a previous release.
PFB-06567 - Picklist Yes or No problem in the CX Project Import utility [TFS 24396]	**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. **Resolution:** Corrected by updating the corresponding formula.

Axiom Capital Tracking

Issue Description	Resolution
PFB-06582 - Capital Transfers overwriting transfers upon breaching 999 transfers [TFS 24822]	**Symptom:** When capital projects exceed 999 transfers, the system overwrites the transfers. **Resolution:** Corrected by updating formulas in several templates.
PFB-06582 - Capital Transfers overwriting transfers upon breaching 999 transfers calc method fix [TFS 29841]	**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. **Resolution:** Corrected by updating the calc method and multiple formulas in the utility.
PFB-06751 - Evaluator Scoring report not saving back [TFS 27007]	**Symptom:** The Evaluator Scoring report does not save back to the database. **Resolution:** Corrected by updating several formulas in the report.

Issue Description	Resolution
PFB-06837 - Missing PR work flow in web form version [TFS 27879]	**Symptom:** Purchase Request process definition does not display in the Process Manager window for the web form version. **Resolution:** Corrected by adjusting the process management to resolve errors in the process flow.
PFB-06898 - Different drop-downs for OP Ex vs Cap Ex for the GL accounts [TFS 28708]	**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. **Resolution:** Corrected by adding a missing filter in the drop-down tag for the GL account when a user selects Operating.
PFB-06899 - Wrong file group referenced in the Open or Create a new project [TFS 28709]	**Summary:** When creating a new project, the web form points to the Next Year drivers instead of the Current Year drivers. **Resolution:** Corrected by pointing to the selected file group instead of the CP_NextYear_Web alias.
PFB-06907 - Dimension Update Report FG error [TFS 28751]	**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. **Resolution:** Correcting the missing data in the CT_Templates table when the table is blank.
PFB-06938 - CapProjectMaster{FY} formatting error on data lookup [TFS 29710]	**Summary:** An error displays when a user opens any plan files with a numeric value in TextField02. **Resolution:** Corrected by fixing the format issue on the TextField02 data lookup.

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, 2018:

Axiom Capital Planning

Issue	Resolution
PFB-07205 - WEB form not saving appropriately [TFS 31474]	**Symptom:** When a user includes tax in some of their Capital tab of the NonThreshold template and click Save, the system does not display a "Successful save" message. After checking the CPREQ table, the tax was not added into the OrigBudget amount. Only when "Processing Plan Files" did the OrigBudget calculate correctly. This works as a work around, but needs to be corrected urgently. **Resolution:** Corrected by updating the formula in row 131 of the Capital tab to allow taxes.

Axiom Capital Tracking

Issue Description	Resolution
CP Web AddOrRebuildCapitalRequest form always uses CP_NextYear drivers [TFS 31949]	**Symptom:** When creating a new plan file in CP_CurrentYear or CP_PriorYear the drivers default to CP_NextYear, instead of the alias associated with the FG. **Resolution:** Corrected by updating the formula in cell D22 to point to D17 instead of D18.

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	**Symptom:** The CapReq2015 dimension no longer has write access due to the change in security. **Explanation:** If this is an active file group (requests being added), you need to manually update security by doing the following: 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

Issue Description	Description
Dimension Maintenance - CPREQ2015 does not have full access	**Symptom:** The CapReq2015 dimension no longer has write access due to the change in security. **Explanation:** If this is an active file group (requests being added), you need to manually update security by doing the following: 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**.

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