



Release Notes  
Axiom Financial Planning  
Version 2019.1.2



KaufmanHall

AXIOM

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# Contents

Summary .....	4
Product upgrade notes .....	5
New features summary .....	6
New option to integrate historical data from Axiom Capital Planning .....	6
New integrated report helps compare data across products .....	6
Make selected drivers available in the Fin Plan task pane .....	8
Issues resolved in 2019.1 .....	9
Issues resolved in 2019.1.1 .....	10
Issues resolved in 2019.1.2 .....	11
Manual setup instructions .....	12
Known issues .....	13

# Summary

Kaufman Hall is pleased to announce the 2019.1.2 release of Axiom Financial Planning. 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

When upgrading to the 2019.1.2 version of Axiom Financial Planning, 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 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 description of the new features and enhancements included in this release.

## New option to integrate historical data from Axiom Capital Planning

For systems integrated with Axiom Capital Planning, administrators can now select up to three years of historical data to include when transferring Axiom Capital Planning project data to Axiom Financial Planning. The CP Transfer Projects to FP Nodes utility in Axiom Capital Planning now has an option to include historical data. For details on this process, see the Axiom Capital Planning online help topic “Transferring capital projects to Axiom Financial Planning.”

**NOTE:** To use this feature, users need to be administrators in both Axiom Capital Planning and Axiom Financial Planning.

For information on working with Axiom Capital Planning data in Axiom Financial Planning, see “Working with capital projects in Axiom Financial Planning” in the Axiom Financial Planning online help.

## New integrated report helps compare data across products

The Management Reporting Variance Analysis report helps Axiom Financial Planning, Axiom Budgeting, and Axiom Rolling Forecast administrators compare Axiom Financial Planning, Axiom Rolling Forecast, and Axiom Budgeting data. You can use this tool to compare results to targets set in Financial Planning for upcoming budget years. This report is now available in Financial Planning reports.

This report allows you to compare operating revenue, income, and expenses from Axiom Financial Planning, Axiom Budgeting, and Axiom Rolling Forecast for a selected Axiom Financial Planning File Group year.

The report provides graphs for the following, with Key Performance Indicator boxes on the right:

- Total operating revenue
- Total operating expenses
- Net operating income
- Total net income over expenses



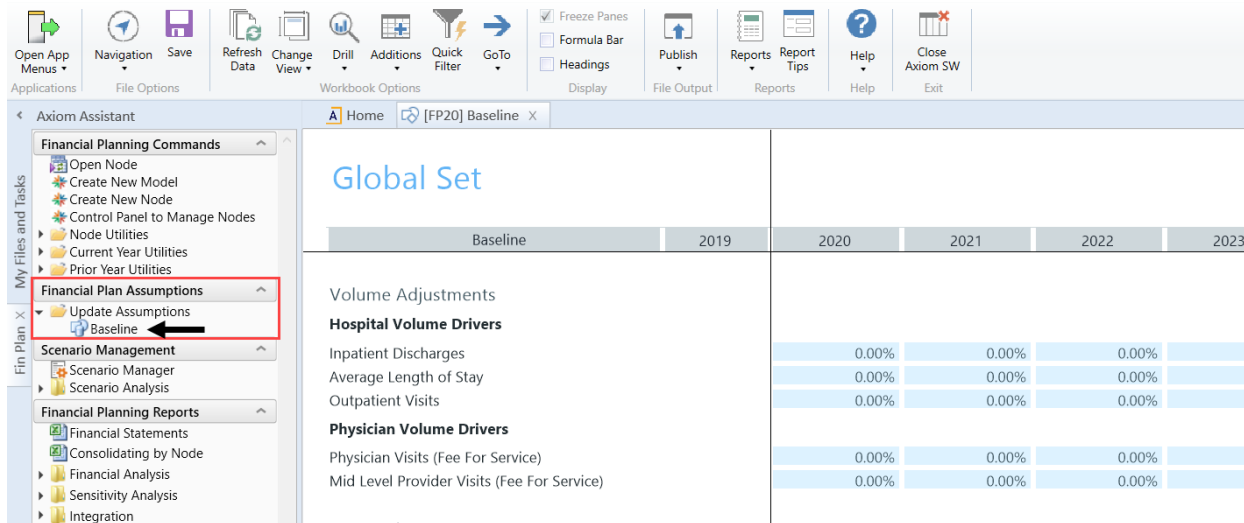
Select and apply filters from the Filters panel on the left to change the comparison data.

Launch the Data Navigator to view the standard income statement for the upcoming budget year.

For more information, see “Using the Management Reporting Variance Analysis report” in the online help.

# Make selected drivers available in the Fin Plan task pane

For non administrative users who need the ability to manage certain drivers, such as global assumptions, Security Administrators can now give those users access to selected drivers in the Axiom Financial Planning Fin Plan task pane. The manage driver utility only displays drivers to which the user has access, and only users with access to at least one driver will see the Financial Plan Assumptions section in the Fin Plan task pane.



*Example of Baseline driver available in the Fin Plan task pane*

For more information, see “Grant user access to specific drivers” in the online help.



# Issues resolved in 2019.1

The following table lists the resolutions for issues addressed in 2019.1, released on April 1, 2019:

Issue Description	Description
PFB-06033 - Legacy Capital Template not adding Capitalized Interest into PPE [TFS 18057]	<p><b>Summary:</b> Capitalized Interest should be flowing to Work In Progress as Additions and ultimately as Capitalization. The formulas in the BalSht on rows 39 - 42 need to be changed to pick up the Capitalized Interest and update the totals appropriately.</p> <p><b>Resolution:</b> Corrected by fixing the code in various tabs so that capitalized interest, depreciation, and interest expense are correct.</p>
PFB-06874 - Equity Contribution not reflecting correctly on the New Debt Node [TFS 28392]	<p><b>Summary:</b> When using the New Debt Node, the equity contribution is not reflected correctly when displaying the total project cost and is not deducted properly when using it in the spending schedule.</p> <p><b>Resolution:</b> Corrected by fixing the code for the Project Cost cell, and corrected code in other cells so that the Equity Contributions from the prior year carry over to the amounts in cells E287, 295, and 303.</p>
PFB-07202 - Incorrect reference for Debt Service and Cushion Ratios [TFS 31502]	<p><b>Summary:</b> The Stats and Ratios calculate different results in the Nodes for some ratios; specifically, any ratio that uses Annual Debt Service, which is the amount spent for that year on Principal and Interest. In the system, Principal Payment is identified by picking up the Previous Year's Current Maturity of Long Term Debt. The ratios involved are Debt Service Coverage, Debt Service / Total Revenue and Cushion Ratio.</p> <p><b>Resolution:</b> Corrected by fixing the formulas and adjusting the Cushion ratio so that the first part of the formula gets the current maturities of debt from the Previous Year value.</p>

# Issues resolved in 2019.1.1

The following table lists the resolutions for issues addressed in 2019.1.1, released on April 22, 2019:

Issue Description	Description
2019.1 Baseline created from prototype has a value left in it [TFS 34293]	<b>Summary:</b> The Baseline driver template contains leftover values that display when the user opens the Baseline driver.  <b>Resolution:</b> Corrected by changing G26 to 0, which updates the entire row on the Assumptions sheet.
PFB-07395 - Scenario Manager - Balance Sheet not calculating correctly [TFS 34597]	<b>Summary:</b> When users create a scenario that incorporates a node that is not integrated with Scenario 0, the Balance Sheet fails to populate for the newly integrated nodes. The balance sheet is hard-coded to scenario 0 and does not update properly for any scenario other than 0.  <b>Resolution:</b> Corrected by making the Scenario 0 dynamic in the following templates: Research, Physician, HealthPlan, Acute. (Changed the control sheet cell H79 in each template to point to the variables tab rather than hard-coded Scenario = 0.)

# Issues resolved in 2019.1.2

The following table lists the resolutions for issues addressed in 2019.1.2, released on May 13, 2019:

Issue Description	Description
PFB-07321 - FP Physician Template [TFS 34756]	<p><b>Summary:</b> In the File Group 2019 and prototype, the calc method formula for Benefits Other in the physician template needs to be corrected. It currently has #ref within the formula in column A after adding in a calc method.</p> <p><b>Resolution:</b> Corrected by changing the column code to the default code for the Other Benefits.</p>

# Manual setup instructions

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

# Known issues

The following table lists the known issues in this release.

Issue Description	Description
Some reports are not formatted for drilling [TFS 14163]	<b>Symptom:</b> When drilling in some of the reports, the results may not have the correct formats. <b>Explanation:</b> Will be fixed in a future release.
Consolidated Node error when nodes have been deleted [TFS 11242]	<b>Symptom:</b> If the last node in the node table has been deleted, the integration utilities assign the next available node based on the current max node number, not accounting for the deleted nodes. When saving the utility, the system returns an error that the node cannot be found. <b>Explanation:</b> Create a manual node from the task pane (you can add it to the sample model), then refresh the utility, and save it. Creating a new node manually creates a new max node value and resolves the missing last node error.

**IMPORTANT:** Refer to the **Axiom for Healthcare Suite 2019.1 Release Notes** for additional known issues that have a suite-wide impact.