Release Notes

Axiom Capital Tracking

Version 2019.1.1

KaufmanHall

AXIOM

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Version: 2019.1.1

Updated: 4/22/2019

Contents

Summary

Kaufman Hall is pleased to announce the 2019.1 release of Axiom Capital 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.

Upgrade process

Complete the following steps to upgrade your Axiom product:

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 2019.1 version of Axiom Capital 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 of Axiom Capital Tracking.

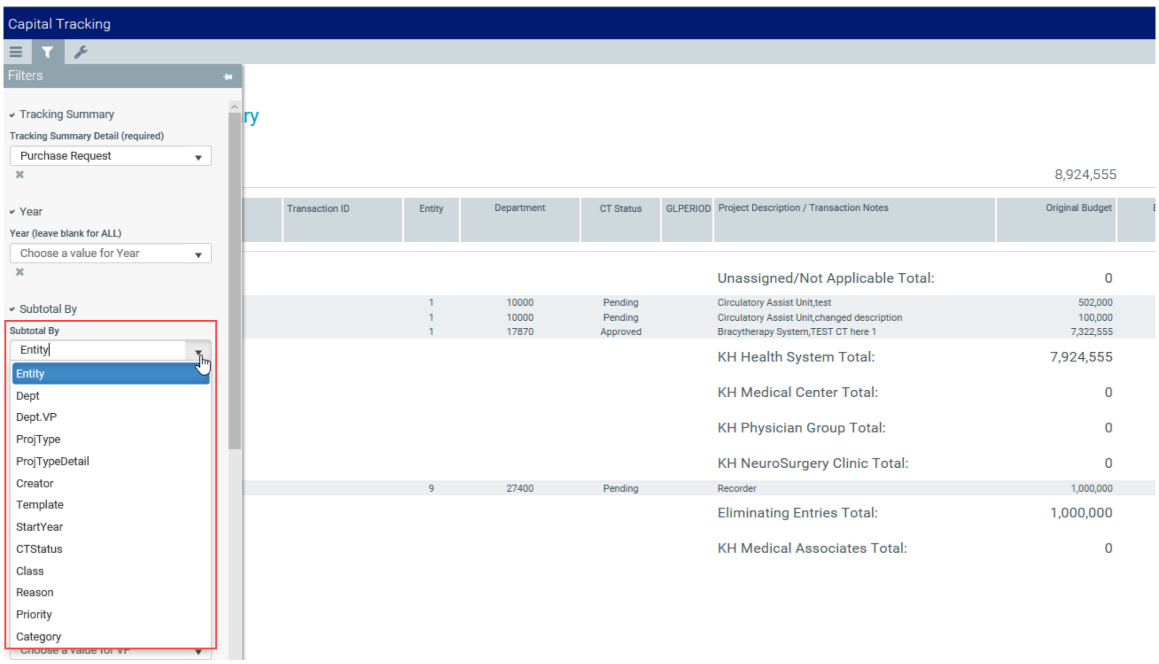
NOTE: The Excel system is sometimes referred to as Legacy system.

Excel and Web systems

Updated Capital Tracking Summary report

The following enhancements have been made to the Capital Tracking Summary report:

- **Subtotal By** - You can now filter the report by different subtotal types, such as entity, department, project type, etc. The report will then break out the subtotals by those sections.



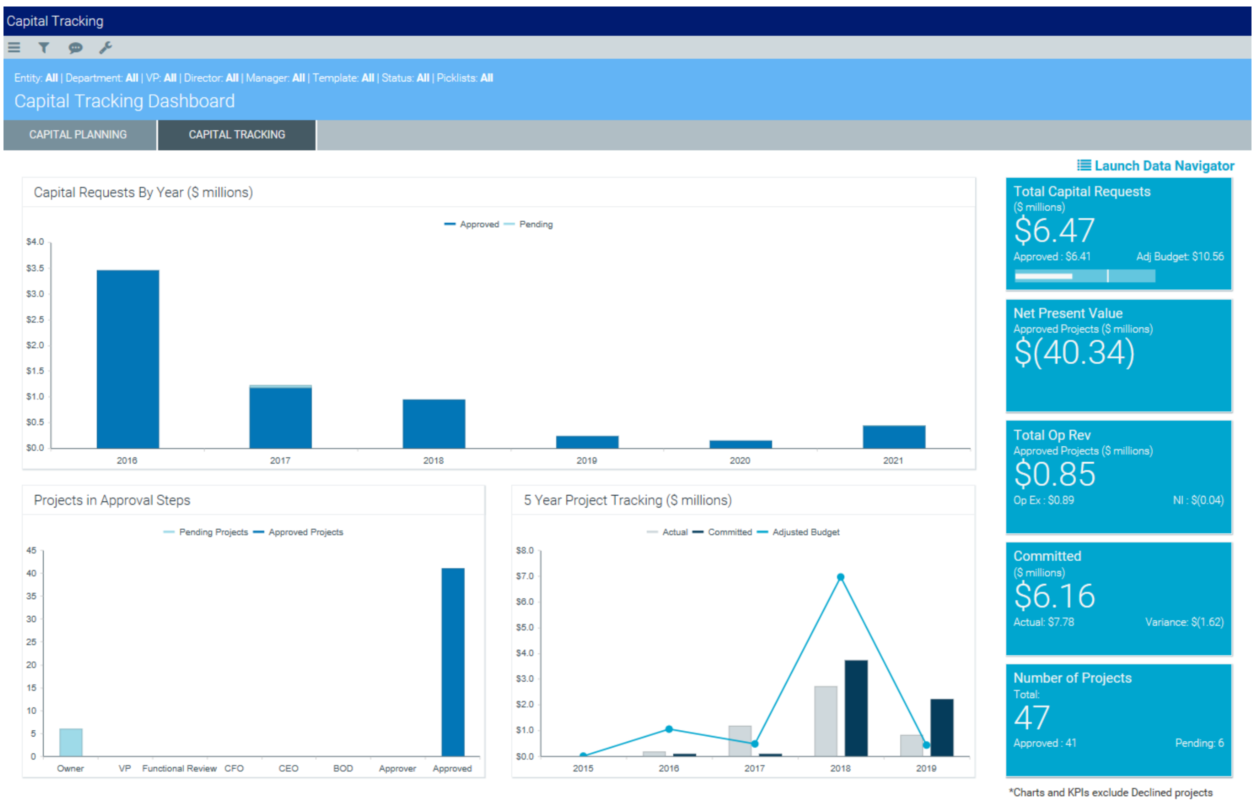
- **Displayed and hidden columns** - The report only shows the columns that are applicable to the variables selected in the Filter panel. For example, when a user selects Full Detail from the Tracking Summary Detail filter drop-down, then all of the columns display, but if a user selects Project ID, then the additional detail columns are hidden.

Web system only

Capital Dashboard

The new Capital Dashboard provides multiple views, filters, and drill capabilities you can use to view capital budget vs. committed vs. actuals as well as workflow status.

> **NOTE:** If your organization also uses Axiom Capital Planning, the dashboard also includes a Capital Planning tab that is specific to viewing capital requests, workflow status, and approval summaries for your organization.



The Capital Tracking tab provides a summary and analysis of you capital requests for each file group planning year. The dashboard charts shows the capital requests by year, the number of pending projects and where they are in the approval process, and actual vs. committed vs. budget projects.

The dashboard also shows KPIs regarding:

- Total number of capital request dollars, including how much has been approved and budgeted
- Net present value (NPV) of approved projects
- Total operating revenue of approved projects, including operating revenue
- The amount of committed dollars across projects, including actual and dollar variance
- Total number of projects, including the number of approved and pending projects

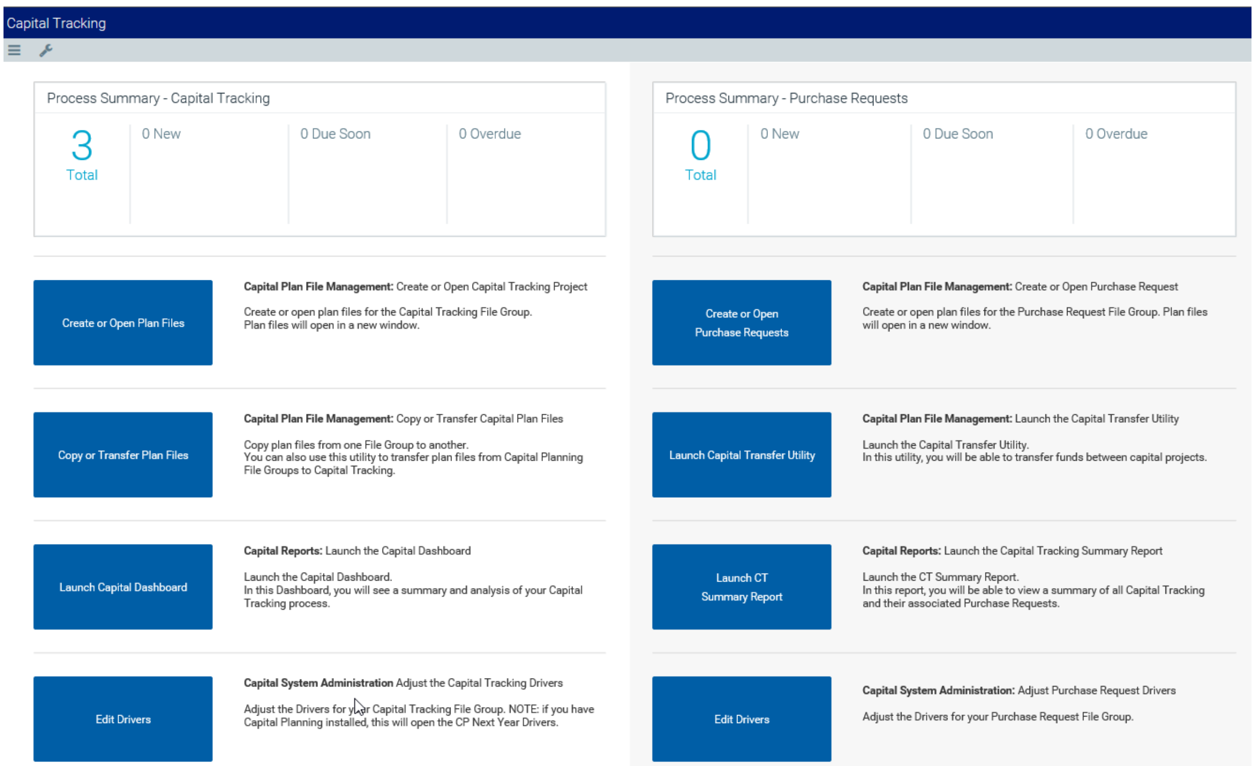
You can filter data in the report using the refresh variables in the Filters panel. You can also dive deeper into the data and configure how the data displays by using the Data Navigator.

For more information, see "Working with the Dashboard" in the online help.

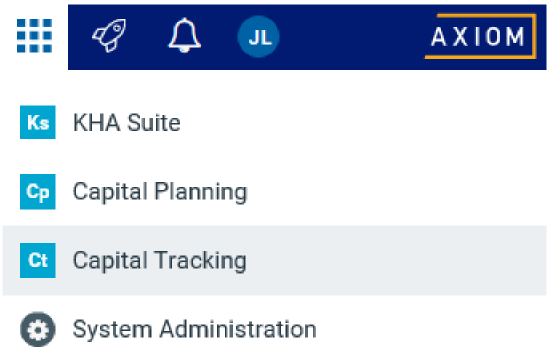
Capital Tracking web home page

The web home page has been updated to provide better accessibility to utilities you use most often, including access to plan files, the new Capital Dashboard, and purchase request files (if configured for your organization), and other utilities.

> **NOTE:** The Capital Tracking home page only shows those features that are available to users based on their security profile. For example, the Edit Drivers button will not display to users with non-administrative role profiles (i.e. end users). Also, the Purchase Request section only displays on the home page if the administrator enables the purchase request process in the Purchase Request drivers > General Setup tab.



After you log in, you can navigate to this page displays by clicking Capital Tracking in the Area menu in the Global Navigation Bar:



Excel system only

No Excel system specific features or enhancements were implemented in this release.

Issues resolved for 2019.1

The following tables list the resolutions for issues addressed in 2019.1, released on April 1, 2018:

Excel and Web systems

Issue	Description
PFB-06994 - Various reports fail when custom filter is added [TFS 29547]	**Symptom:** In multiple reports, there is a "blue row" that suggests a filter. In these reports when a filter is added, one that is not part of the refresh variables, the report will fail. **Resolution:** Corrected by removing an extraneous filter and updating a formula in the query.

Web system only

Issue	Description
PFB-06997 - Capital Tracking report [TFS 29502]	**Symptom:** The Capital Tracking Directory report only uses one set of drivers, which must be in the aliases. This is a problem since the report can query plan files from multiple start years, and drivers can change over time. **Resolution:** Corrected by adjusting the calc method row of the query to substitute out the correct StartYear to use when pulling in the driver table data.
PFB-07198 - Process Flow reports [TFS 31501]	**Symptom:** In the PR Process Flow Days in Step report, It looks like the formula in column C of the report worksheet returns “0”. **Resolution:** Corrected by updating the calc method row formula in row 8.
PFB-07268 - Standard asset "Open Plan File" icon not correct [TFS 33192]	**Symptom:** The CT Assign ProjectID includes the wrong formula for opening in Web Form view. When you click the folder icon, the system opens the form for editing rather than displaying. **Resolution:** Corrected by updating the formula in cell G16 on the Report sheet.

Issue	Description
PFB-07256 - Capital Tracking Web-Capital Dimensions -Vendor save error [TFS 33244]	**Symptom:** If there are not any templates listed in the CT_ Templates table, the system displays an error in the vendor sheet when attempting to save the Capital Dimensions Utility. **Resolution:** Corrected by updating several formulas in the Variables sheet.

Excel system only

Issue	Description
PFB-07063 - (2018.3) Multiple Capital Transfer Utility - #ERR in ProjectID [TFS 30284]	**Symptom:** When using the Multiple Capital Transfer Utility, a client reported that some of their CAPREQs return with a #ERR for the ProjectID and no description. **Resolution:** Corrected by updating the formula in cell X41 of the Multiple Capital Transfer Utility as well as updating the formulas in cells X501 and V501 in the Transfer calc method.
PFB-07256 - Capital Tracking - Capital Dimensions -Vendor save error [TFS 32772]	**Symptom:** When you save Capital dimensions, the system displays an error in cell: L7 - Cell formula Errors. **Resolution:** Corrected by updating the Description to its previous entry.
PFB-07250 - CTDetail lines occasionally not pulled into Tracking sheet [TFS 33136]	**Symptom:** On refresh, sometimes the purchase request and invoice line items disappear from the tracking sheet. **Resolution:** Corrected by updating the batch processing.

Issues resolved for 2019.1.1

The following tables list the resolutions for issues addressed in 2019.1.1, released on April 23, 2018:

Excel and Web systems

No issues were addressed in both the Excel and Web systems in this release.

Web system only

Issue	Description
Additional Sheet Not Saving [TFS 34463]	**Symptom:** Additional sheet does not save in Threshold plan files. **Resolution:** Corrected the formula in the control sheet in cell P8 for the ST1 logic.
Additional Sheet Not Allowing Submit [TFS 34603]	**Symptom:** When a user adds an additional sheet to a Threshold plan file, the system displays an error when a user clicks Submit. **Resolution:** Corrected by updating the process plan files validation data source with the missing variables needed to run queries in the finance_group template for each additional sheet.

Excel system only

No issues were address for the Excel system only in this release.

Manual setup instructions

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

Known issues

Excel and Web system

There are no known issues for this release.

Web system only

Issue	Description
Items remain locked for five minutes [TFS 30262]	**Issue:** When a plan file is opened in the Capital Planning Web system, it remains locked for five minutes after the user closes it. The system does not allow an approver to make changes without extra steps (steal the lock). **Resolution:** This issue will be addressed in a future release.
Not Saving Balance Sheet & Financial Statements Data Correctly [TFS 33703]	**Issue:** When a user inserts values into the financial section, the system does not completely save data to the database for tabs where no data has been entered directly. **Resolution:** Nightly processing should be set up to save all data. This issue will be addressed in a future release.

Excel system only

There are no known issues for this release.

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