Release Notes

Axiom Financial Planning

Version 2019.2.1

KaufmanHall

AXIOM

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Summary

Kaufman Hall is pleased to announce the 2019.2.1 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 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.

Client Success

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 clients. 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

IMPORTANT: You must apply the Axiom Software 2019.2 upgrade before applying any 2019.2 Axiom product upgrades. Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2019.2 before the first product upgrade. Refer to the **Axiom Software 2019.2 Release Notes** and **Axiom Healthcare Suite 2019.2 Release Notes** for considerations before upgrading.

When upgrading to the 2019.2.1 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.

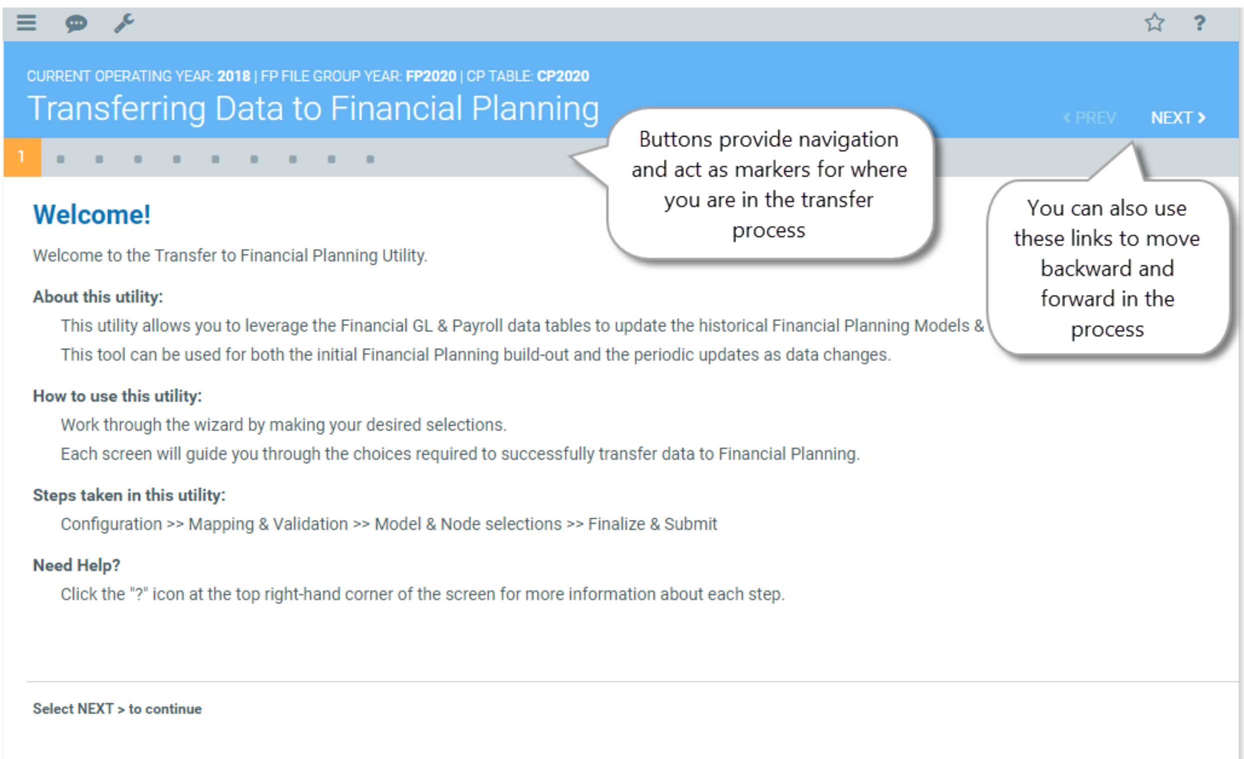
New features summary

This section includes a description of the new features and enhancements included in this release.

New Transfer to Financial Planning integration utility

Axiom Financial Planning administrators now have a better way to map and transfer data from Axiom Management Reporting and Axiom Rolling Forecast systems to Axiom Financial Planning. The form-based Transfer to Financial Planning utility available from the Fin Plan Admin task pane replaces the Excel-based Transfer from Operating Budget and Transfer from Rolling Forecast utilities.

The new utility includes all the functionality in the old utilities but presents it in a user-friendly wizard that walks you step-by-step through the process of mapping, configuring, and transferring data.



Welcome page of Transfer to Financial Planning utility

The utility consists of four main parts:

- **Configuration** – Select the time periods, data sources, and data to be transferred.
- **Code mapping and validation** – Utility checks code mapping for mismatches, presents warnings for any found, and allows you to make corrections before submitting.

- **Model and node selection** – Select which nodes to include, which models to save data to, and the desired node types. The utility allows you to create a new model if the one you want does not exist.
- **Final check and submission** – Select whether to create nodes on submission or to not create nodes if you want to add data from another source and build the nodes later. Click Submit when ready to transfer data.

For more information, see “Using the Transfer to Financial Planning utility” in the online help.

Issues resolved in 2019.2

The following table lists the resolutions for issues addressed in 2019.2, released on June 24, 2019:

Issue Description	Description
PFB-07321 - FP Physician Template [TFS 34015]	**Summary:** Calc method formula for Benefits Other in the physician template in FG2019 and prototype needs to be corrected. It currently has #ref within the formula in column A after adding in a CM. **Resolution:** Corrected by updating the formula in the applicable cells.
PFB-07395 - Scenario Manager - Balance Sheet not calculating correctly [TFS 34222]	**Summary:** When a user creates a scenario incorporating an unintegrated node in Scenario 0, the Balance Sheet does not populate for the newly integrated node. The balance sheet is hard coded to scenario 0 and does not update properly for any scenario other than 0. **Resolution:** Corrected by making the balance sheet dynamic in certain cases so that it updates based on the selected/created scenario.
PFB-07467 - NodeAllocationIDs string length is back to 20 instead of 50 [TFS 34856]	**Summary:** In the Nodes tables, the AllocationID column was expanded from 20 to 50. As part of a package update to 2019.1, the following error would occur if the tables had data in the column that exceeded 20 characters: "Error: Unable to shorten data length for column NODE2019.AllocationID from 40 to 20. Data would be truncated." **Resolution:** Corrected by changing the length on the AllocationID column from 20 to 50.
PFB-07598 - Select Model list errs NodeManagerForm [TFS 35852]	**Summary:** The user gets an error when using the Rename Node functionality in Axiom Financial Planning because the Node and Model combobox data sources are on the same sheet (NODE_INFO). The Node list contains > 700 items, which pushes the Model List combobox source below the 500 row requirement, therefore the datasource is not recognized. **Resolution:** Corrected by separating the data sources. Created a new MODEL_LIST tab that pulls the data from AQ2 for the Model combo box, and removed AQ2 from the NODE_INFO tab.

Issues resolved in 2019.2.1

The following table lists the resolutions for issues addressed in 2019.2.1, released on July 22, 2019:

Issue Description	Description
Financial Statements By Model Report filter header needs to be adjusted [TFS 36830]	**Summary:** The “Financial Statements By Model Report” filter header needs to be adjusted. **Resolution:** Corrected in the Axiom platform software.
Default data workbook 'Financial Planning R2' failing on save - description field on ACCT_FPCODE too short to handle concatenation [TFS 37090]	**Summary:** The formula in column H of the default data workbook “Financial Planning R2.xlsx” sheet ACCT_FPCODE concatenates two description fields from other tables (PAYOR, CODE). Each description field can have potentially 100 characters, so when the formula tries to store the resulting string in the ACCT_FPCODE.Description field, which is limited to a maximum of 100 characters, there is not enough room. **Resolution:** Corrected by expanding the Description column character limit in the ACCT_FPCODE table.

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]	**Symptom:** When drilling in some of the reports, the results may not have the correct formats. **Explanation:** Will be fixed in a future release.
PFB-07322 - Clone node & refresh history [TFS 34016]	**Symptom:** Historical data does not populate when a node is cloned and the setup driver's "Update Historical Data when opening plan files" setting is set to YES. **Explanation:** Will be fixed in a future release. Template will be updated to turn off update history AQ when a node is cloned. **Workaround:** History does populate correctly when the setting is set to NO. Change setting "Update Historical Data when opening plan files" in the Setup driver to NO.

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2019.2 Release Notes** for additional known issues that have a suite-wide impact.