Release Notes

# Axiom Capital Tracking

Version 2019.2.2

KaufmanHall AXIOM

KaufmanHall

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# Contents

# Summary

Kaufman Hall is pleased to announce the 2019.2.2 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.

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

**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 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

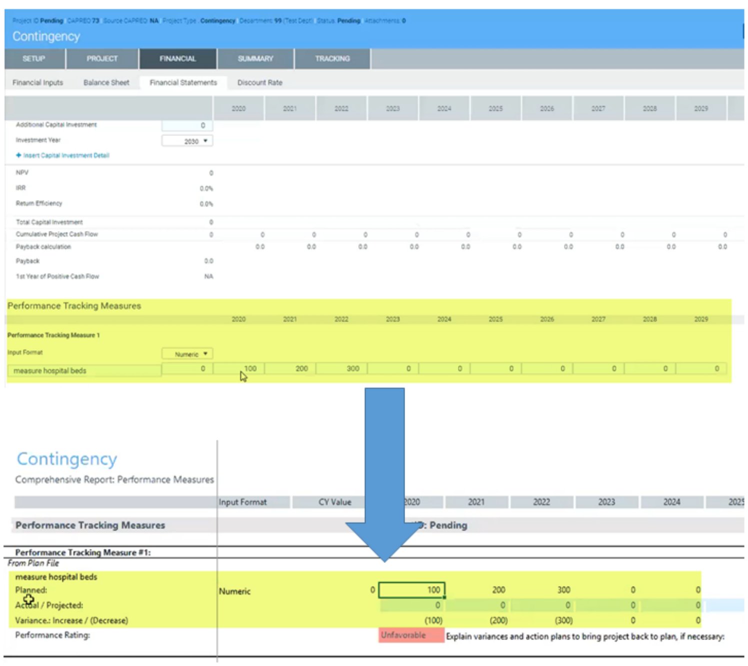
This section includes a description for each new feature included in this release of Axiom Capital Tracking.

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

## Excel and Web systems

### Updated functionality to the Retrospective Comprehensive Update report

The Retrospective Comprehensive Update Report now includes data from the Performance Tracking Measures section in the Financial Statements tab of the Pro Forma project plan file (Threshold project).




Plan file > Financial Statements tab > Performance Tracking Measures section

Retrospective Comprehensive Update report

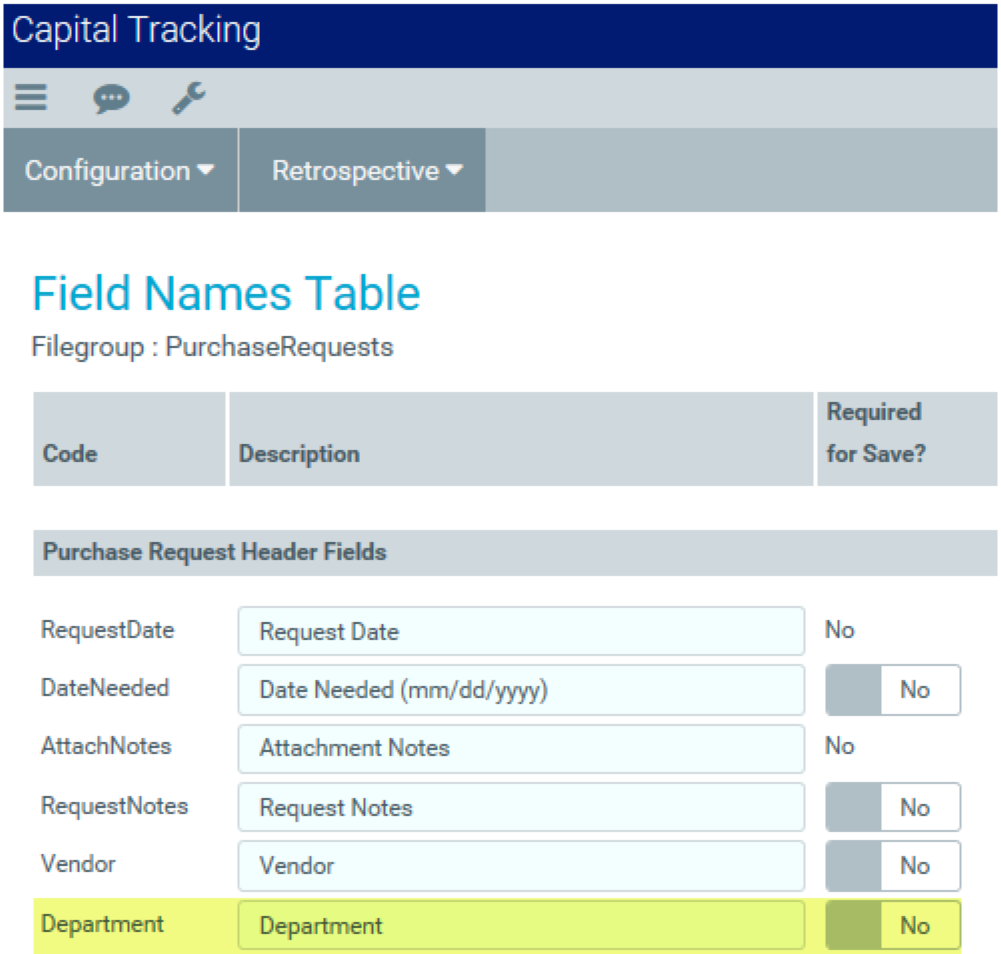
For instructions, see the following in the online help:

- "Entering performance tracking measure in a Threshold project"
- "Running the Retrospective Comprehensive Update report"

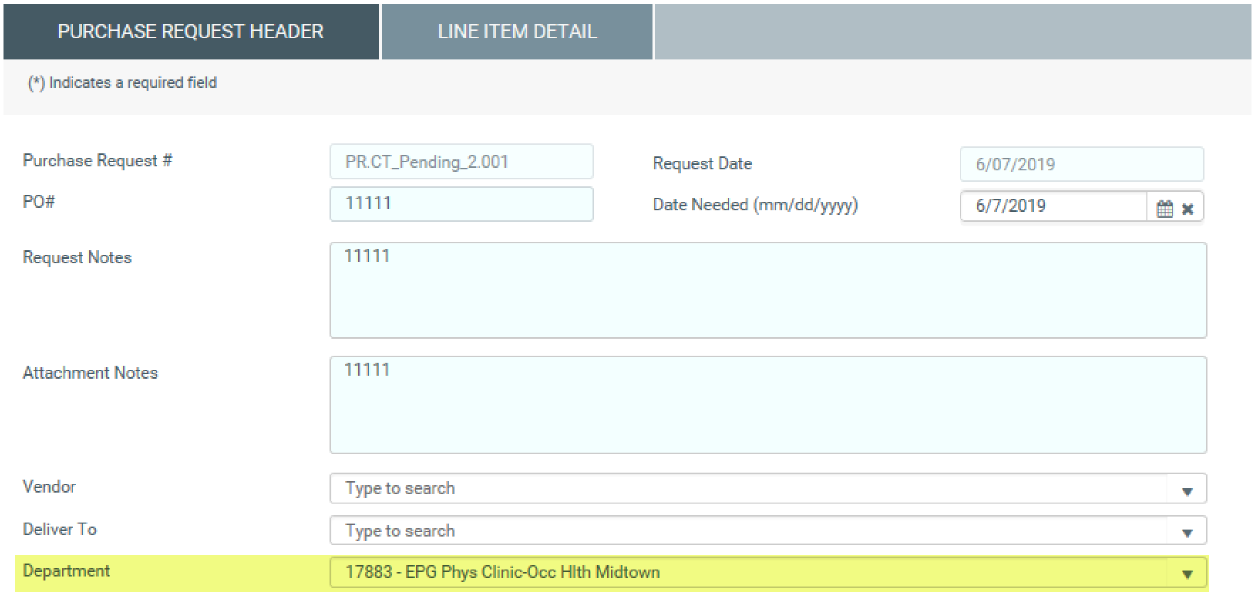
# Web system only

## Department option in purchase request headers and line items

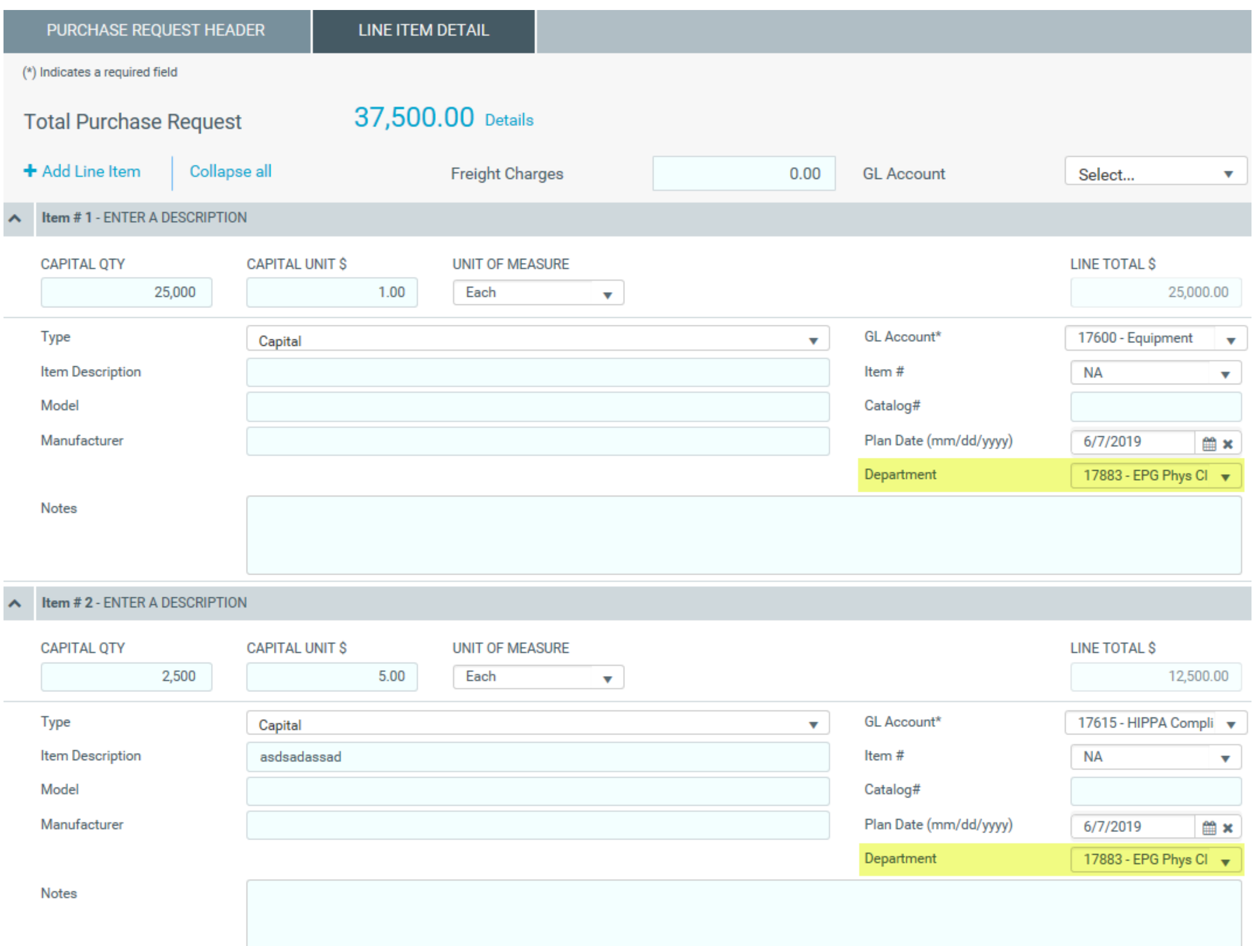
You can now include a department field in the purchase request form. This new field is now included in the Field Names Table driver.




The Department field is located in the Purchase Request Header under the Deliver To field.




It is also located in the Line Item Detail tab under the Plan Date field. The department displays the department selected in the Purchase Request header, but users can change it, if needed.



For instructions, see the following topics in the online help:

- "Configuring field names"
- "Creating a purchase request"

# Excel system only

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

# Issues resolved for 2019.2

The following tables list the resolutions for issues addressed in 2019.2, released on June 24th, 2019:

## Excel and Web systems

| Issue | Description |
|---|---|
| PFB-07591 - CT Manual Journal Entry save tag formula error [TFS 35782] | **Symptom:** The Manual Journal Entries utility no longer references the JE type to set whether the save tag should be [Save] or Do Not Save.<br><br>**Resolution:** Corrected by adjusting the formulas in cell AD45. |

## Web system only

| | |
|---|---|
| PFB-07434 - Cap Track User role has access to the utilities [TFS 34589] | **Symptom:** The Capital Tracking User role should not have access to the following subfolders:<br>• Transfer folder/ Utilities<br>• Accounting folder/Utilities<br>**Resolution:** Corrected by updating the Capital Tracking User role to remove access to the folders described above. |
| PFB-07435 - Cap Track Transfer role does not have access to transfer utilities folder [TFS 34588] | **Symptom:** The Cap Tracking Transfer role does not have access to the Capital Transfer utilities. The permissions should be configured to read only, save data, and show in explorer.<br><br>**Resolution:** Corrected by adjusting the Cap Tracking Transfer role to allow access to the Capital Transfer utilities, and set the permissions to Read Only, Save Data, and Show in Explorer. |
| PFB-07436 - Cap Track Accounting role does not have access to the Accounting utilities [TFS 34587] | **Symptom:** The Cap Tracking Accounting role does not have access to the Accounting utilities. The permissions should be configured to read only, save data, and show in explorer.<br><br>**Resolution:** Corrected by adjusting the Cap Tracking Accounting role to allow access to the Accounting utilities, and set the permissions to Read Only, Save Data, and Show in Explorer. |

| | |
|---|---|
| PFB-07448 - User Filter row hidden on PR Process Flow Days in Step report [TFS 34792] | **Symptom:** The filter row should display in the PR Process Flow Days in Step report.<br><br>**Resolution:** Corrected by linking the show/hide tag in row 19 to the correct value in the Variables tab. |
| PFB-07556 - Purchase Request 2019.1 Template Issue [TFS 35460] | **Symptom:** In the Purchase Request Project Information section of the Purchase Request form, the budget exception displays even though this project was created in Capital Planning and then transferred over to Capital Tracking with no transfers or any changes that should have caused a budget exception.<br><br>**Resolution:** Corrected by updating the formulas in cells H65 and H54 of the template. |
| PFB-07639 - Status Comments in CT Project Import tool saving to wrong column [TFS 36224] | **Symptom:** The status comments in CT Project Import tool points to the StatusComments column instead of the CTStatusComments column on the SAVE2DB row.<br><br>**Resolution:** Corrected in call AF3 by changing the following: ".StatusComments" to ".CTStatusComments" |
| FTE issue [TFS 34365] | **Symptom:** In the 2019.1 template, when volumes are in year two but not in year one, a div/0 error occurs on the FTE tab.<br><br>**Resolution:** Corrected the formulas in the following assets:<br>• Finance_Group<br>• Finance_Group_Upgrade<br>• FinInputs calc method library<br>• FinInputs_Upgrade calc method library |
| Additional Sheet Not Saving [TFS 34463] | **Symptom:** Additional sheet does not save in Threshold plan files.<br><br>**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.<br><br>**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

| Issue | Description |
|---|---|
| PFB-07329 - Projects Plan File - Tracking tab exponent notation [TFS 34017] | **Symptom:** In the Tracking tab of the plan file, column AB displays account numbers in exponent notation.<br>**Resolution:** Corrected by changing the format to Number with zero decimal places in cell AB26 of the calc method. |

# Issues resolved for 2019.2.1

No issues were addressed in this release.

# Issues resolved for 2019.2.2

The following tables list the resolutions for issues addressed in 2019.2.2, released on August 19th, 2019:

### Excel and Web systems

No issues were addressed in this release.

### Web system only

| Issue | Description |
| --- | --- |
| Purchase Request Freight GL Account Not Saving Correctly [TFS 37491] | **Symptom:** The system does not properly save the GL Account selection in the purchase request line items.<br><br>**Resolution:** Corrected by updating the associated formulas and cells. |
| Purchase Request template missing items from drivers [TFS 38150] | **Symptom:** The Purchase Request Additional Header Fields and Header Picklists do not display in the template.<br><br>**Resolution:** Corrected by updating the template page formatting. |

### Excel system only

| Issue | Description |
| --- | --- |
| Legacy 2021 FG Calc Method Insert Issues [TFS 37805] | **Symptom:** The Capital Tracking file group includes the 2021 templates but not the calc methods. As a result, the system displays an error when inserting a calc method.<br><br>**Resolution:** Corrected by adding two missing calc method files into Capital Tracking and resetting the calc methods in the template. |

# Manual setup instructions

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

# Known issues

Excel and Web systems

| Issue | Description |
| --- | --- |
| Legacy and Web Mixed system-Process Management [TFS 34280] | **Issue:** When you click Show Inactive Process to start process management for Capital Tracking or Purchase Request in a mixed system environment, the system provides two options for each one. It is unclear which one you need to pick to start. This is still an issue after updating file groups from legacy to web.<br><br>**Resolution:** This issue is under consideration for a future release. |

Web system only

| Issue | Description |
| --- | --- |
| PFB-07282 - Legacy Rebuild Scheduler job needs AQ1 and AQ2 activated for the Capital20 tab [TFS 33260] | **Issue:** The CT Rebuild Job includes only six AQs selected in the Process Plan Files task of the job. To pull in the default GLACCTs, AQ1 and AQ2 both need to be activated for the CapitalXX tab for all rebuild templates. Only when the client is using default GLACCTs does this have an impact.<br><br>If these are not activated when the project is rebuilt, it will create a CTDATA record with ACCT = 0. Then, when a normal "Process Plan Files" is run, or the project is opened and saved, a record is added with ACCT = "default acct#".<br><br>**Resolution:** This issue is under consideration for a future release. |
| Clear all on the CT side should not have Capital Planning Variables be required [TFS 33798] | **Issue:** There are three Refresh Variables that really only should be needed on the Capital Planning side of the dashboard. These are: 1) Capital Planning Year 2) Capital Requests CP Chart 1 3) Capital Requests CP Chart 2. If a user clicks the X by any of these in the Capital Tracking side of the dashboard OR clicks the Clear All button, these three variables are required to be completed before the user can click Apply. However, these are not applicable at all to the CT side of the dashboard.<br><br>**Resolution:** This issue is under consideration for a future release. |

### Excel system only

No known issues have been reported.

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