

Release Notes
Axiom Capital Planning
Version 2019.4.1

KaufmanHall

5202 Old Orchard Rd. Suite N700
Skokie, IL 60077
(847) 441-8780
(847) 965-3511 (fax)
www.kaufmanhall.com

Support email: support@kaufmanhall.com

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Version: 2019.4.1

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Summary

Kaufman Hall is pleased to announce the 2019.4.1 release of Axiom Capital 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.

NOTE: For the most updated release notes, view/download them from Axiom Help. After logging into your Axiom product, click the Main ribbon tab, and then click **Online Help**. At the top of the home page, click **Release Notes**.

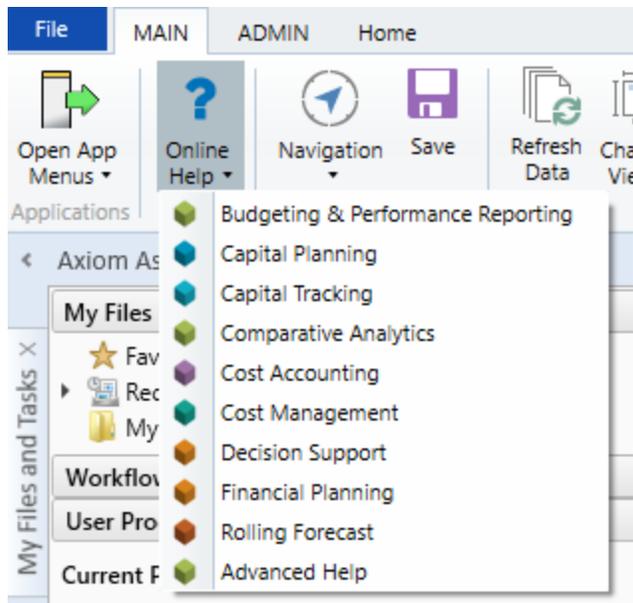
Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support@kaufmanhall.com to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
 - Desired Axiom Software platform version.
 - Desired Axiom for Healthcare product and version.
 - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Kaufman Hall can do this.
 - Propose an approximate two-hour downtime window when Kaufman Hall can apply update (s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Kaufman Hall).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

Help and Training

Kaufman Hall provides world-class resources at your fingertips directly within the Axiom Software system. Axiom Help provides topics, knowledge base articles, documents, webinar/training announcements, and videos to guide you through managing your system. To access these resources, do any of the following:

- **Online help** - From the Main or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window. The online help will only open for products you are licensed to use.



- **Contextual help** - Form/web-enabled features include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right corner of the screen. For more detailed information, open Axiom Help by clicking **Open Help** at the top of the contextual help dialog.



Escalating to Axiom Support

As always, we appreciate your commitment to Kaufman Hall. If you have any questions about your upgrade, please contact us by logging into Axiom, navigating to the online help for your product, and clicking the **Support** at the top of the home page.

Product upgrade notes

IMPORTANT: You must apply the Axiom Software 2019.4 upgrade before applying any 2019.4 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 2019.4 *before* the first product upgrade. Refer to the **Axiom Software 2019.4 Release Notes** and **Axiom Healthcare Suite 2019.4 Release Notes** for considerations before upgrading.

When upgrading to the 2019.4.1 version of Axiom Capital 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 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 Planning.

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

► Web system only

Configure Unit Cost, # Items, and Sales Tax descriptions

You can now change the description for Unit Cost, # Items, and Sales Tax to best suit the needs of your organization. You can also select the template group in which to include Unit Cost and # Items.

Summary Financial Capital and Operating Inputs

View

Filegroup : Capital Planning-2023

Default Number of Input Years	<input type="text" value="1"/>	Display Oplmpacts Worksheet for Template Group?	<input type="text" value="Always"/>
Allow Users to Change Number of Input Years	<input checked="checked" type="checkbox"/>	Display Oplmpacts Worksheet for CP or CT?	<input type="text" value="CP and CT"/>
Allow Users to Change Start Year	<input checked="checked" type="checkbox"/>	Default Total Years for Financial Analysis	<input type="text" value="5"/>
Allow Users to Change Sales Tax Rate	<input checked="checked" type="checkbox"/>		

Line Item	Enable for Template Group?	Useful Life/ Inflation	Capital Account	KHA Code	GL Account	Sales Tax
Capital Cost Detail						
Unit Cost	Always	10	Equipment	132003	0	
# Items	Always					
Subtotal:						
Sales Tax:	Never	10	Equipment	132003	0	
Header:						
IT Costs	NonThreshold					
Hardware	NonThreshold	5	Information Systems	132007	0	0.0%
Software	NonThreshold	5	Information Systems	132007	0	0.0%
Implementation	NonThreshold	5	Information Systems	132007	0	0.0%
Network Infrastructure	NonThreshold	5	Information Systems	132007	0	0.0%

For instructions, see "Configuring summary financial capital and operating default inputs" in the online help.

Capital Planning Project Scoring and Selection utility

The new Capital Project Scoring and Selection utility is a web-based feature that provides one location for your organization to manage the process of selecting, evaluating, and submitting next year's planned projects for approval. The utility consists of the following tabs: Project Ordering and Scoring, Project Selection, and Evaluation Scoring.

NOTE: The tabs that display are determined by a user's role profile. Capital Planning administrators see the Project Ordering and Scoring, and Project Selection tabs. The Capital Committee members only see the Evaluator Scoring tab.

- Project Ordering and Scoring** - This tab allows Capital Planning administrators to configure the order of projects for the Capital Committee members for evaluation and scoring by sorting and filtering projects. Administrators can order projects in multiple ways and select which projects are non-discretionary. The tab also includes links to the project plan files and any corresponding documentation attached to the project. The table includes project and financial summary information accessible through links that allows administrators to expand or contract the data, as needed.

Grouping: **None** | Entity: **All** | Department: **All** | VP: **All** | Director: **All** | Manager: **All** | Template: **All** | Status: **All** | Class: **All** | Reason: **All** | Priority: **All** | Category: **All** | Additional Filter: **CPREQ2020.OrigBudget2020 > 20000**

Capital Project Scoring & Selection Utility

INTRODUCTION **PROJECT ORDERING & SCORING** PROJECT SELECTION

Project Ordering & Scoring Admin

The Capital Planning Admin should use this tab to order Capital Projects or review committee member scores. To edit committee member scores, click on the settings button.

Settings		View Project Details>>					View Financial Summary >>	
Order	Non-Discr.	Entity	Department	CAPREQ	Description	2020 Requested	Total Requested	
1	<input checked="" type="checkbox"/>	2	26470	30	Nurse Call System,NEW Test Call system for nursing wi	\$905,985.00	\$905,985.00	
2	<input checked="" type="checkbox"/>	3	17885	94	Helium Analyzer	\$5,000,000.00	\$8,500,000.00	
3	<input checked="" type="checkbox"/>	0	279	Other Central Sterile	\$170,000.00	\$640,000.00		
4	<input type="checkbox"/>	0	5	655 Contingency	\$94,472.50	\$94,472.50		
5	<input type="checkbox"/>	0	5	656 Contingency	\$94,472.50	\$94,472.50		
6	<input type="checkbox"/>	0	5	657 Contingency	\$94,472.50	\$94,472.50		
7	<input type="checkbox"/>	0	5	658 Contingency	\$94,472.50	\$94,472.50		
8	<input type="checkbox"/>	1	10000	667 Sanitizer Unit	\$44,968.75	\$44,968.75		
9	<input type="checkbox"/>	1	17840	384 Sanitizer,test test test	\$1,165,656.00	\$4,880,805.00		
10	<input type="checkbox"/>	1	10001	594 Audiometer	\$4,000,000.00	\$12,000,000.00		
11	<input type="checkbox"/>	1	18960	605 Vacuum Mixing Device,non integrated 2nd sheet	\$100,000.00	\$500,000.00		
12	<input type="checkbox"/>	0	5	648 Biopsy System	\$100,000.00	\$400,000.00		
13	<input type="checkbox"/>	2	99	57 Bandage Winder,test	\$1,000,000.00	\$1,000,000.00		

- Project Selection** - From this tab, administrators can model different capital allocation portfolios before selecting projects to include in the final portfolio. Projects are automatically added to the portfolio in rank order based on scores provided by the Capital Committee members, until all available capital has been allocated. Administrators can also mark projects to include in a portfolio, regardless of score. For example, projects that must be completed due to regulatory mandates, prior approval, and so on. The system indicates the projects that qualify for the portfolio by applying gray shading to the row.

Grouping: None | Entity: All | Department: All | VP: All | Director: All | Manager: All | Template: All | Status: All | Class: All | Reason: All | Priority: All | Category: All | Additional Filter: CPREQ2020.OrigBudget2020 > 20000

Capital Project Scoring & Selection Utility

INTRODUCTION | PROJECT ORDERING & SCORING | **PROJECT SELECTION**

Enter Full Screen Mode

Project Selection: Base Case Admin

The Capital Planning Admin will select which Projects will be selected.

Total Capital Available: \$5,000,000 Constraint Total Capital Selected: \$4,979,729 \$7,931,957 [Export to Excel](#)

Settings Base Case [View Project Details >>](#) [View Financial Summary >>](#) [View Alt. Rankings >>](#)

Order	Include	Non-Discr.	CAPREQ	Description	2020 Requested	Total Requested	Average Rank	Prev. Selection
279	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Other Central Sterile	\$170,000.00	\$640,000.00	15.9	ND
94	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Helium Analyzer	\$5,000,000.00	\$8,500,000.00	15.6	
30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Nurse Call System,NEW Test Call system for nursing wii	\$905,985.00	\$905,985.00	25.7	ND
667	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Santizer Unit	\$44,968.75	\$44,968.75	0.0	X
23	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Sterilizer Process Indicator,this will be a 5m project	\$5,000,000.00	\$5,000,000.00	18.3	
561	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Other EVS,pending project	\$45,115.38	\$45,115.38	16.4	X
560	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Disinfecting Unit	\$61,908.00	\$61,908.00	15.3	X
594	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Audiometer	\$4,000,000.00	\$12,000,000.00	41.5	
506	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Water Jet Unit	\$21,000.00	\$21,000.00	14.7	X
447	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Other EVS,34525 2	\$9,883,696.00	\$9,883,696.00	23.2	
546	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Hemodialysis Unit Blood Pump	\$34,351.35	\$34,351.35	14.5	X
271	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Other Central Sterile	\$170,000.00	\$640,000.00	18.4	X
614	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Contingency	\$22,550.78	\$22,550.78	12.2	X
109	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Data Management System,chicago 1	\$20,375.00	\$40,750.00	14.3	X
526	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Water Jet Unit	\$21,000.00	\$21,000.00	11.4	X
605	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Vacuum Mixing Device,non integrated 2nd sheet	\$100,000.00	\$500,000.00	18.2	X

- **Evaluator Scoring** - Capital Committee members score the proposed projects in the Evaluator Scoring tab, which lists the available projects as set up by the Capital Planning administrator. To evaluate projects before scoring, committee members can open project plan files and corresponding documents as well as view project details and financial summary information as part of the table. The table includes columns for a variety of criteria that committee members use to score on a scale determined by the administrator (the default scale is 0 to 100). The scoring columns are indicated by the blue cells, each of which is weighted as indicated by the percentage in the parenthesis in the column header.

Grouping: None | Entity: All | Department: All | VP: All | Director: All | Manager: All | Template: All | Status: All | Class: All | Reason: All | Priority: All | Category: All | Additional Filter: CPREQ2020.OrigBudget2020 > 20000

Capital Project Scoring & Selection Utility

INTRODUCTION | EVALUATOR SCORING

Evaluator Scoring Capital Committee

Capital Committee members should review each project and enter a score prior to the Project Selection step

[View Project Details >>](#)
[View Financial Summary >>](#)

Order	ENTITY	Department TESTER	CAPREQ	Description	2020 Requested	Total Requested	Average Score	Impact on Patient and/or Physician Satisfaction (70%)	Quality, Safety & Compliance Effectiveness (10%)	Strategic & New Business Growth (10%)	Impact on Employee Work Experience (10%)
1		3	17885	94 Helium Analyzer	\$5,000,000.00	\$8,500,000.00	54.6	62	83	0	29
2		0	5	655 Contingency	\$94,472.50	\$94,472.50	0.0	0	0	0	0
3		0	5	656 Contingency	\$94,472.50	\$94,472.50	0.0	0	0	0	0
4		0	5	657 Contingency	\$94,472.50	\$94,472.50	0.0	0	0	0	0
5		0	5	658 Contingency	\$94,472.50	\$94,472.50	0.0	0	0	0	0
6		1	17840	384 Sanitizer,Test test	\$1,165,656.00	\$4,880,005.00	63.4	84	22	0	24
7		1	18960	605 Vacuum Mixing Device,non integrated 2nd sheet	\$100,000.00	\$500,000.00	79.5	99	61	0	41
8		0	5	648 Biopsy System	\$100,000.00	\$400,000.00	10.2	11	12	13	0
9		2	99	57 Bandage Winder,Test	\$1,000,000.00	\$1,000,000.00	39.4	41	69	0	38
10		0	4	616 Other Central Sterile,Test	\$1,000,000.00	\$1,000,000.00	78.1	99	70	0	18
11		2	99	483 Ultrasonic Cleaning System,Test	\$100,000.00	\$300,000.00	22.2	15	73	0	44
12		0	5	447 Other EVS,34525 2	\$9,883,696.00	\$9,883,696.00	99.4	100	99	98	97
13		1	18983	651 Sanitizer Unit,Test this	\$34,197.01	\$34,197.01	0.0	0	0	0	0
14		1	17870	13 Other Dialysis,When can we submit this?	\$42,900.00	\$191,664.00	10.5	8	29	0	20
15		0	4	72 Angioplasty System	\$213,939.00	\$9,362,036.00	47.2	50	70	20	32

For more information, see the following topics in the online help:

- "Determining capital projects for next year"
- "Sorting and ordering projects for review"
- "Scoring projects"
- "Modeling capital allocation portfolios"

Issues resolved for 2019.4

The following tables list the resolutions for issues addressed in 2019.4, released on December 16th, 2019:

Excel and Web systems

Issue	Description
PFB-08208 - Issue w/ Capital Planning Validating Projects in Workflow [TFS 40541]	<p>Issue: When creating a Capital Planning workflow for project approvals, the system displays an error message during the first step of the workflow when the system validates the projects.</p> <p>Resolution: Corrected an error in the Financial Inputs AQ filter.</p>
Capital Project Import Utility project type detail missing data [TFS 39921]	<p>Issue: If a project type detail value is added to the driver table, a user cannot select it in the utility.</p> <p>Resolution: Corrected by sorting by columns B and C as well as added a new filter.</p>

Web system only

Issue	Description
CP Executive Summary Report - Business Plan tab Descriptions are getting cut off [TFS 39505]	<p>Issue: The Executive Summary report does not display descriptions in full.</p> <p>Resolution: Corrected the column width to display the description.</p>
Contractual Allowance methodology change error	<p>Issue: When a user selects a value other than Per Case and enters a value, it will save, but when the plan file is reopened the value disappears. The same happens for Ancillary and OP.</p> <p>Resolution: Corrected by updating the contractual allowance section of the calc method library to pull in the previously saved drop-down values for each of the drop-down sections and updated the changes in column D of AQ4.</p>

Issue	Description
Changing account values doubles entries when transferred from CP to CT [TFS 40124]	<p>Issue: Rows in the template duplicate because if the user has a Capital Planning and Capital Tracking system, the user would only ever set the Default GL account in Capital Planning. The template in Capital Tracking looks for the Default GL account in CT_Setup, even though the user already set this in Capital Planning driver, which caused duplicated rows.</p> <p>Resolution: Corrected by updating row 125 in the Variables sheet to not switch to CTSetup when in Capital Tracking.</p>
POTRANS table department populating with 0 [TFS 40348]	<p>Issue: When creating a new purchase request, the system passes the values from Create_Open_PurchaseRequest to the POTRANS table. However, the POTRANS.Dept value is not included and, in the POTRANS table, this value's default is zero. When a new record is created, the zero initially gets saved to the table. When the user does not have access to Dept=0, a problem occurs.</p> <p>Resolution: Corrected by updating cell J12 in NewPurchaseRequest to bring in the department associated with the CAPREQ in the CTREQ table.</p> <p>NOTE: If you manually update utilities with a version including DEPT, be sure to also add DEPT to the POTRANS and CTDetail tables, otherwise the system will generate an error when saving data from the updated utilities.</p>
Details tab error when date value removed [TFS 40600]	<p>Issue: When a user sets a text field to a date, clicks the X to blank out the value and then saves it, the tab displays an error on refresh.</p> <p>Resolution: Corrected by updating the formulas in Textfield column Y so that blanks (or NAs) remain blank on open or refresh.</p>

Excel system only

Issue	Description
PFB-08064 - Unable to add new picklist rows in CP2018 [TFS 39585]	<p>Issue: Users cannot add new rows to the picklist drivers.</p> <p>Resolution: Corrected by removing the incorrect cell reference.</p>

Issue	Description
<p>PFB-08087 - Legacy - CPREQ2020 and CPREQ2021 tables should have OTIS access disabled [TFS 39591]</p>	<p>Issue: The OTIS read access for CPREQ2020 and CPREQ2021 tables should be set to None for these dimensions in Legacy Capital Planning.</p> <p>Resolution: Corrected by setting the access to these tables to read only.</p>
<p>PFB-08235 - Capital Dashboard in Non-Web CP Product [TFS 40574]</p>	<p>Issue: The Capital Dashboard asset is packaged with the non-web version of Capital Planning. This asset should be removed from the product package to avoid customer confusion, as this dashboard does not work without the web product.</p> <p>Resolution: Corrected so that the dashboard is no longer accessible by the non-web version of Capital Planning.</p>

Issues resolved for 2019.4.1

The following tables lists the resolutions for issues addressed in 2019.4.1, released on January 27th, 2019:

Excel and Web systems

Issue	Description
Project Selection Utility - Issues may occur with ordering on Project Ordering & Scoring tab [TFS 42157]	<p>Issue: The following issues may occur in these scenarios when sorting or grouping projects</p> <ol style="list-style-type: none">1. When using the Refresh Variables to do a Sort By in the Project Ordering tab, if the projects were sorted in a new order and saved, the order appears to revert back to the sort selected by the Refresh Variable panel.2. When using Group By, the system allows the user to move projects into other grouping, which did not make sense and displayed the records strangely. <p>Resolution:</p> <ol style="list-style-type: none">1. Corrected the sort order default to using the .PresentOrder column as the initial sort.2. Corrected by adding on to some of the existing logic and inserted two new columns (now in M and N).

Web system only

No issues were addressed in this release.

Excel system only

No issues addressed in this release.

Manual setup instructions

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