Release Notes

Axiom Capital Tracking

Version 2020.1

KaufmanHall

AXIOM

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About the release notes

Kaufman Hall is pleased to announce the 2020.1 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.

The purpose of these release notes is to provide you with the following:

- High-level descriptions of new features
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

> **TIP:** Periodically, the release notes are updated when new information is available, including patch release fixes. To view the latest release notes, we encourage you to view them in the Axiom Capital Planning online help. On the help home page, simply click the Release Notes link at the top of the page.

New features in 2020.1

Axiom Capital Tracking 2020.1 delivers updated integration with Axiom Rolling Forecast with a new wizard-based asset as well as a few other client requested enhancements

Share project budget data with Axiom Rolling Forecast

The Transfer Capital Tracking to Rolling Forecast utility has been redesigned and updated to provide a web-based wizard experience so that you can quickly and easily transfer the specific data needed to include and manage in your rolling forecast plan files.

Enhanced filtering for Update Project Initiator reports

In 2020.1, we enhanced the Update Project Initiator reports for both Axiom Capital Planning and Capital Tracking by providing new mechanisms in which to filter information. These enhancements include the standard refresh variables options included in many Kaufman Hall reports as well as an advanced filtering capability to only generate the reports with information you want to work with.

Axiom Capital Planning information displays in Financial Input sheet tabs

When transferring capital projects to Axiom Capital Tracking, you can now see that the values in the Financial Input sheets came from Axiom Capital Planning—make it easier to see where the data came from, particularly in Capital Tracking plan files with multiple sheets.

Share project budget data with Axiom Rolling Forecast

▶ Why use this feature

You can now transfer project data to Axiom Rolling Forecast, which allows you to get the most out of your Axiom Healthcare products to meet the forecasting needs of your organization.

The Transfer Capital Tracking to Rolling Forecast utility has been redesigned and updated to provide a web-based wizard experience so that you can quickly and easily transfer the specific data needed to include and manage in your rolling forecast plan files.

▶ How this feature works

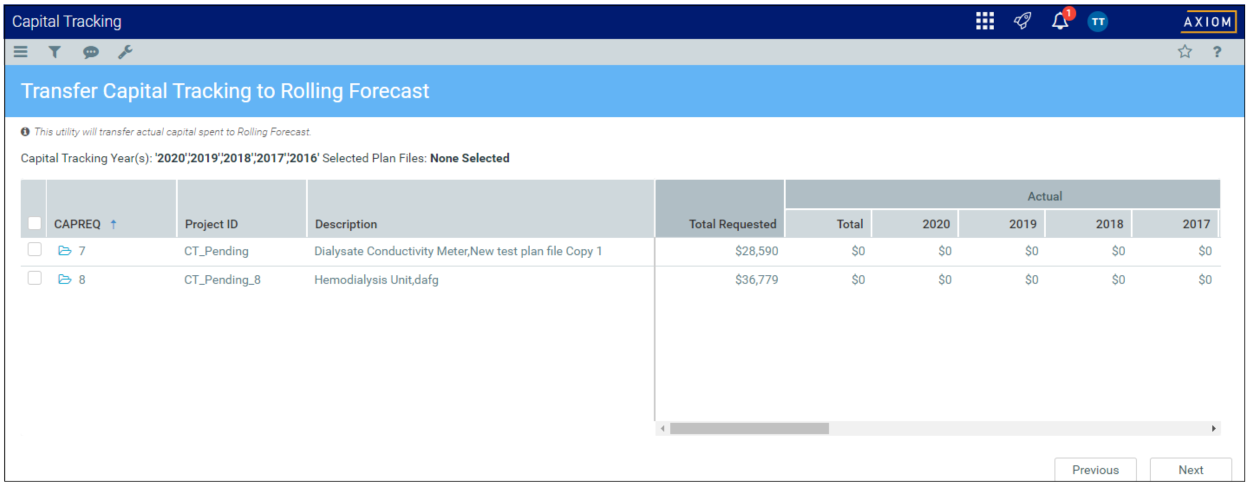
What: If your organization is licensed for Axiom Capital Tracking and Axiom Rolling Forecast, you can quickly and easily transfer capital project data to Axiom Rolling Forecast using the new web-based Transfer Capital Tracking to Rolling Forecast utility.

Systems: Web and Legacy

Where: The utility is available from the Capital Tracking home page or from the Cap Track Admin task pane.

Who: Users must be assigned both the Capital Tracking Administrator and Rolling Forecast Administrator roles to use this utility.

How: From the Capital Tracking home page or from the Cap Track Admin task pane > Integration section, click **Transfer Capital Tracking to Rolling Forecast**. The wizard will walk you through the process of selecting the projects to transfer.



Where to find more information

The following topic in the online help has been updated with information and instructions for using this feature:

- "Transferring capital project data to Axiom Rolling Forecast"

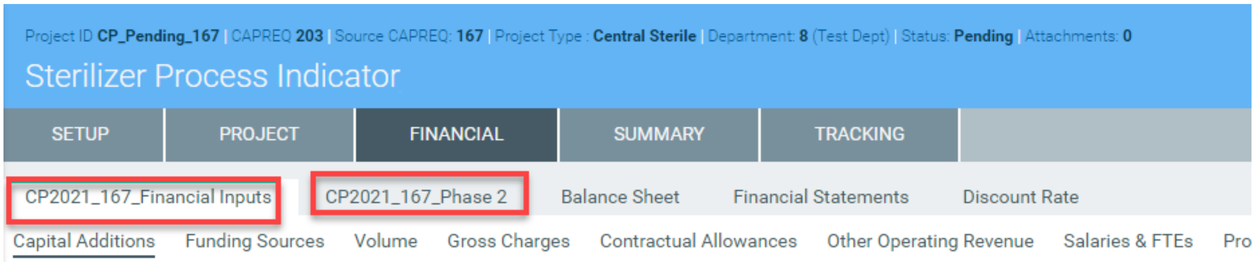
Axiom Capital Planning information displays in Financial Input sheet tabs

Why use this feature

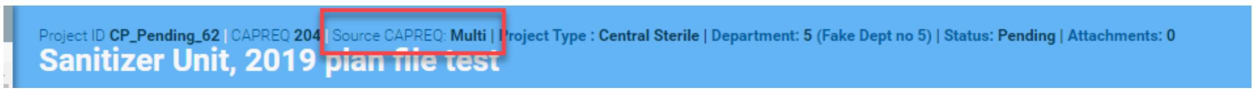
When transferring capital projects to Axiom Capital Tracking, you can now see that the values in the Financial Input sheets came from Axiom Capital Planning—make it easier to see where the data came from, particularly in Capital Tracking plan files with multiple sheets.

How this feature works

What: If the Capital Planning project includes additional or renamed Financial Input sheets and the project is opened in Capital Tracking, then the tab names will display CP_source file group year_sheet name, as shown in the following example:



Also, when transferring multiple Capital Project files to an existing Capital Tracking plan file, the **Source CAPREQ** area at the top of the plan file page displays "Multi" as shown in the following example:



Systems: Web and Legacy

Where: The changes occur in the Financial Input sheets and the plan details of the capital project.

Who: All Capital Tracking users

How: From the Capital Tracking home page, click **Create or Open Capital Projects**. From the Open Existing Capital Project section, select a project transferred from Axiom Capital Planning.

Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Updating the project or purchase request creator"

Enhanced filtering for Update Project Initiator reports

Why use this feature

The Update Project Initiator reports for Capital Planning and Capital Tracking as well as the PR Update Purchase Request Initiator report allow you to easily track and manage your organization's projects/purchase requests, their descriptions, as well as their creators. From here, you can change request creator by simply selecting a new name from the user list. This is especially useful when someone leaves your organization and you need to assign the project/purchase request to a new or existing employee.

In 2020.1, we enhanced these reports by providing new mechanisms in which to filter information. These enhancements include the standard refresh variables options included in many Kaufman Hall reports as well as an advanced filtering capability to only generate the reports with information you want to see.

How this feature works

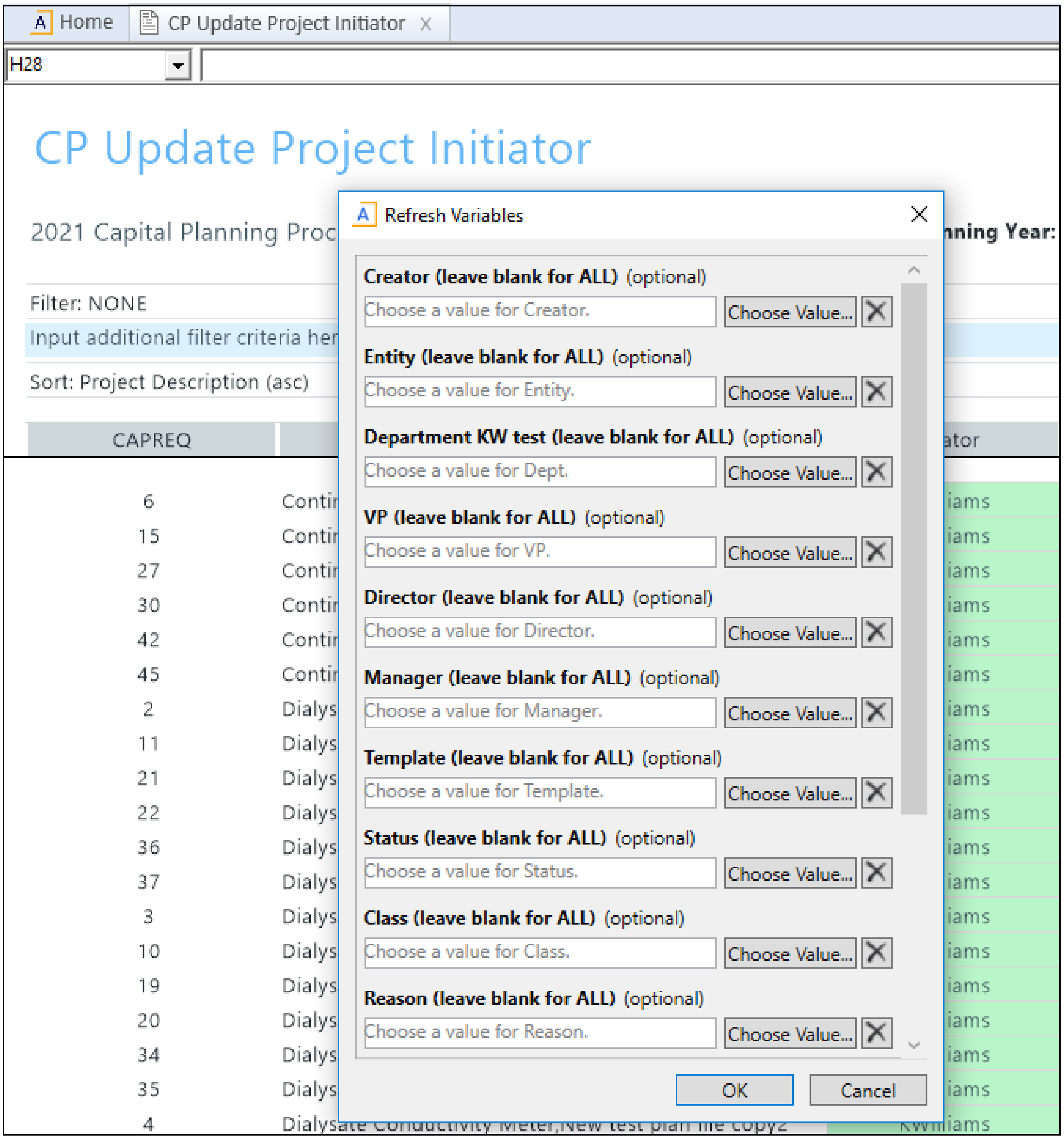
What: When opening the report, you can use the Refresh Variables action to filter the information to include in the report. After applying the Refresh Variables, you add an additional filter to fine tune the information that displays.

Systems: Web and Legacy

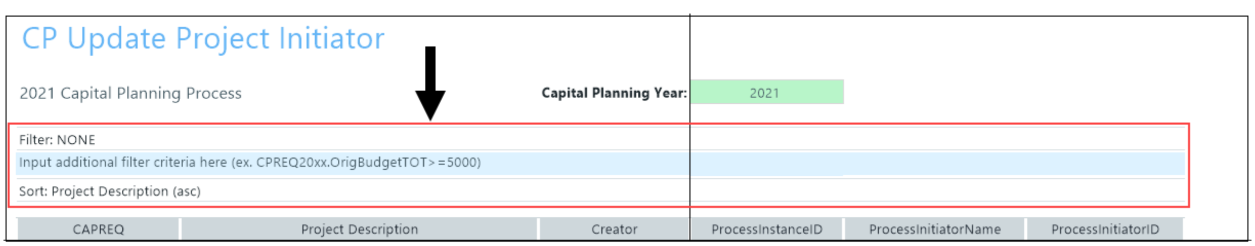
Where: CP Update Project Initiator report, CT Update Project Initiator report, PR Update Purchase Request Initiator report

Who: Capital Planning and Capital Tracking Admins

How: In the Cap Plan Admin or Cap Track Admin task pane, navigate to the **Administration** section, click **Administrative Utilities > Security Setup**, and then double-click the CP/CT Update Project Initiator or PR Update Purchase Request Initiator report. Press F9 to initiate the Refresh Variables action. In the Filter section above the table, type a filter statement using the appropriate filter syntax.



Refresh Variables dialog



Advanced Filter function

Click here to watch a video demonstration

Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Updating the project creator"

What to know before upgrading

IMPORTANT: You must apply the Axiom Software 2020.1 upgrade before applying any 2020.1 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 2020.1 *before* the first product upgrade. Refer to the **Axiom Software 2020.1 Release Notes** and **Axiom Healthcare Suite 2020.1 Release Notes** for considerations before upgrading.

When upgrading to the 2020.1 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.

Preparing and scheduling upgrades

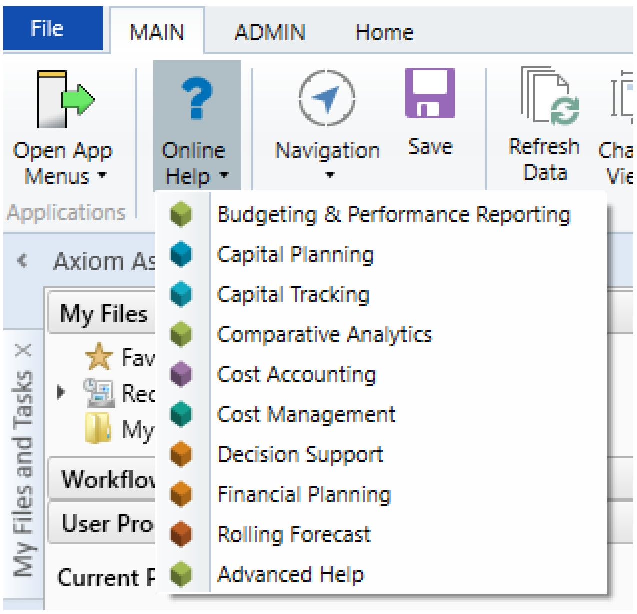
Summary of the upgrade process:

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.

Getting 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.

Issues fixed for 2020.1

The following tables list the resolutions for issues addressed in 2020.1, released on April 30th, 2020:

Excel and Web systems

Issue	Description
CT Security task pane and utility save and display issues [TFS 46361]	**Issues:** 1. The CT Admin Security Setup folder is not linked to the folder under reports, so new files added into the folder do not display in the task pane. 2. The Cap Tracking Security Update Utility is set to downgrade to Read Only on open, which prevents the user from saving. **Resolution:** 1. Corrected the CT Admin task pane so that it links to the folder rather than individual items. 2. The downgrade to Read Only is consistent with other security update utilities in other Axiom products. It will not downgrade if the user is an administrator. Downgrade to read only does not affect whether a user can save data.

Web system only

Capital Transfer Utility Error when transferring from the same project more than once at a time [TFS 43869]	**Issue:** 1. The system displays an error if the same project is used more than once in the same session. 2. If a user uses a start month of 13, it results in an incorrect GL period in CTDEtail. **Resolution:** 1. Corrected the formulas in cells CG51, CG61, CG71 in the Transfers sheet. 2. Corrected the formula in variables!C50 so that if 13 is the start year, it will change to 1; otherwise, it will just take the start year that is configured.

PR Home Page link errors [TFS 43323]	**Issue:** Several links on the Capital Tracking home page generate errors. **Resolution:** Corrected by updating the incorrect home page commands.
PR Template labels currently need a little more row height adjusting as some of the text gets cut off if labels are long in drivers [TFS 44041]	**Issue:** Long labels in the drivers display poorly. **Resolution:** Corrected by adjusting the row height in the template.
PFB-08409 - PurchReq LineItem Vendor field not updated by Header change [TFS 42225]	**Issue:** The CTDETAIL.Vendor field does not populate from the PurchReq Header tab field of Vendor upon save. Since a PurchReq should be for only ONE Vendor, there should be no selection option on the LineItem tab. **Resolution:** Corrected by updating the formula in LineItems!DH137.
Purchase Request template - PO number not getting saved for subsequent line items [TFS 40286]	**Issue:** The system saves the PO number for a purchase request for the first line item but not subsequent ones. **Resolution:** Corrected the LineItems calc method.

Excel system only

No issues addressed in this release.