



Release Notes
Axiom Financial Planning
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 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.

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 Financial 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 Financial Planning 2020.1 delivers expanded innovations across the entire Customer 360 platform, empowering you to get a single shared view of your customer and deliver more moments that matter.

[New utility shares capital project data with Axiom Financial Planning](#)

The Transfer Capital Projects to Financial Planning 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 financial planning files.

[Enhancements to the Code Dimension Update utility](#)

A new mapping column and additional Revenue items have been added to the Code Dimension Update utility. The Transfer to Financial Planning utility uses the Code Dimension table in transferring data between products. Enhancements to the Code Dimension utility provide additional information and mapping options when integrating data.

New utility shares capital project data with Axiom Financial Planning

► Why use this feature

Axiom Financial Planning includes utilities that allow you to transfer project data from other Axiom products, including Axiom Capital Planning. This sharing of data allows you to get the most out of your Axiom Healthcare products to meet the many financial planning needs of your organization.

The Transfer Capital Projects to Financial Planning utility provides a form-based wizard experience so that you can quickly and easily transfer the specific data needed in your Financial Planning plan files.

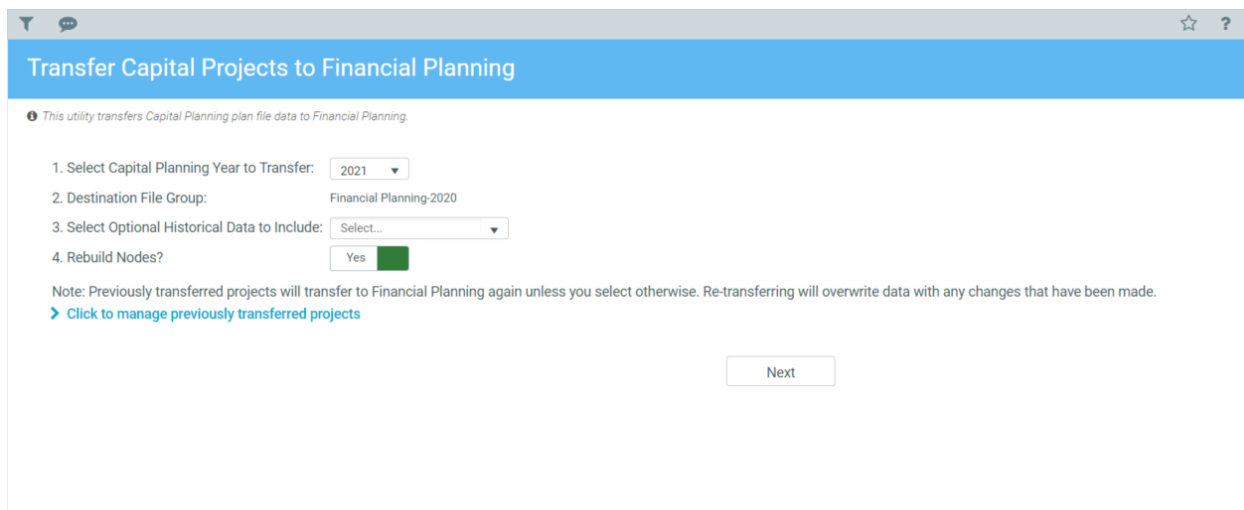
► How this feature works

If your organization is licensed for Axiom Capital Planning and Axiom Financial Planning, you can quickly and easily transfer capital project data to Axiom Financial Planning using the new Transfer Capital Projects to Financial Planning utility.

Where: This new utility is available from the Integration section of the Fin Plan Admin task pane.

Who: Administrators who have both Axiom Capital Planning and Axiom Financial Planning products can use this utility.

How: From the Fin Plan Admin task pane > Integration section, click **Transfer Capital Projects to Financial Planning**. The wizard will walk you through the process of selecting the projects to transfer.



The screenshot shows a web-based wizard titled "Transfer Capital Projects to Financial Planning". The interface includes a blue header bar with the title. Below the header, a message states: "This utility transfers Capital Planning plan file data to Financial Planning." The wizard consists of four steps:

1. Select Capital Planning Year to Transfer: A dropdown menu showing "2021".
2. Destination File Group: A text field showing "Financial Planning-2020".
3. Select Optional Historical Data to Include: A dropdown menu showing "Select...".
4. Rebuild Nodes?: A checkbox labeled "Yes" which is checked.

Below the steps, a note reads: "Note: Previously transferred projects will transfer to Financial Planning again unless you select otherwise. Re-transferring will overwrite data with any changes that have been made." A link below the note says: "Click to manage previously transferred projects". At the bottom right, there is a "Next" button.



Click [here](#) to watch a video demonstration

► Where to find more information

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

- "Transferring capital project data"
- "Select and transfer capital projects"
- "Working with capital project data in plan files"

Enhancements to the Code Dimension Update utility

A new mapping reference column and additional Revenue items have been added to the Code Dimension Update utility.

► Why use this feature

Axiom Financial Planning includes utilities that allow you to transfer data from other Axiom products, including Axiom Management Reporting and Axiom Rolling Forecasting. This sharing of data allows you to get the most out of your Axiom Healthcare products to meet the many financial planning needs of your organization.

The Transfer to Financial Planning utility uses the Code Dimension table in transferring data between products. Enhancements to the Code Dimension utility provide additional information and mapping options when integrating data.

► How this feature works

If your organization is licensed for Axiom Management Reporting and/or Axiom Rolling Forecasting, you can quickly and easily transfer operating budget and rolling forecast data to Axiom Financial Planning using the Transfer to Financial Planning utility. The CODE dimension table contains all the valid CODE items used in the Axiom Financial Planning system. For each revenue item listed in the CODE and Description columns of the Code Update Report, the new reference column displays the mapping code to use in the ACCT table's FPCode column to map that item to Axiom Financial Planning.

Where: This change applies to the Code Dimension Update utility, available from the Fin Plan Admin task pane, which is used to update Dimension tables used specifically by Axiom Financial Planning.

Who: Only Axiom Financial Planning administrators can access and use this utility to modify Axiom Financial Planning Dimensions.

How: From the Fin Plan Admin task pane, in the **Administration** section, expand **Dimension Update Utilities**, and then double-click **Code Dimension**. The new column, Mapping Code (Transfer to FP Only), is column N. In the following example, to map Payor Inpatient Gross Revenue to Axiom Financial Planning, you would use the code listed in column N.

H	I	J	K	L	M	N	O
Code Update Report							
CODE	Description	Active	Conversion Factor (Transfer to FP Only)	Conversion Factor YR2 (Transfer to FP Only)	Conversion Factor YR3 (Transfer to FP Only)	Mapping Code (Transfer to FP Only)	
Other Revenue (Mapping Codes must be combined with Payor number, i.e. R_IPREV9 would map to payor 9)							
421100	Payor Inpatient Gross Revenue	Yes	1000	1	1	R_IPREV9	
422100	Payor Outpatient Gross Revenue	Yes	1000	1	1	R_OPREV9	
423100	Physician Charges	Yes	1000	1	1	R_PHYREV9	
424100	Mid Level Charges	Yes	1000	1	1	R_MLREV9	
652800	Health Plan Revenue	Yes	1000	1	1	R_Premium9	
925710	Indirect Funding - Research (Payor Detail)	Yes	1000	1	1	S_RIF110	
925810	Total Realized Funding - Research (Payor Detail)	Yes	1000	1	1	R_RRF110	
952810	Health Plan Premium Revenue (Payor Detail)	Yes	1000	1	1	R_Premium210	
962580	Total Research Grant (Awarded)		1000	1	1	S_RG110	

► Where to find more information

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

- “Updating Axiom Financial Planning dimensions - Update the Code dimension”

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 Financial Planning, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, updated drivers, 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.
- Driver files will 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.

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.

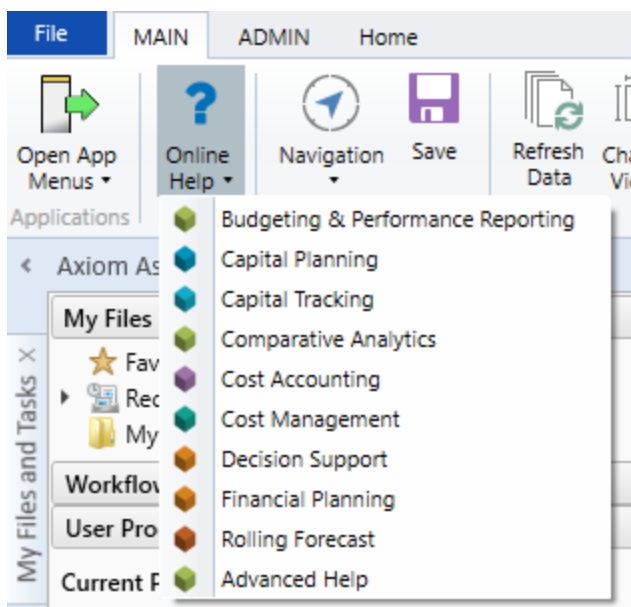
- Propose an approximate two-hour downtime window when Kaufman Hall can apply update (s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Kaufman Hall).
3. **Complete manual configuration updates** – After installing 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.

NOTE: 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 **Axiom Support** link at the top of the home page.

Issues fixed in 2020.1

The following table lists the resolutions for issues addressed in 2020.1, released on April 30, 2020:

Excel system

Issue	Description
Update DIM - CODE missing Net Asset codes [TFS 39202]	Summary: The Code Dimension Update utility is missing Net asset codes. Resolution: Corrected by adding the missing codes.
Control Panel Does not save model status [TFS 40428]	Summary: In the Control Panel to Manage Nodes, when a user selects a status from the Model Status drop-down menu and then saves the value, the model status value does not save. Resolution: Corrected by changing the affected cell formula to point to the correct cell.
Node Rebuild Utility has text cut off before it really should in Windows (maybe other instances too) [TFS 41627]	Summary: In the Windows Client, when the Node Rebuild Utility is opened from the Admin task pane, some of the text on the form page is cut off instead of wrapping. Resolution: Corrected by adding text wrapping to the column style, by adjusting the grid height, and by moving the button down so that all page components fit on the page.
Annual Rollforward Utility - Error thrown if file group other than Current Year selected as source [TFS 41784]	Summary: In the Annual Rollforward Utility, a user choosing a source File Group other than FP_CurrentYear causes an error: "Error refreshing Axiom Query 'AQ1:Models List' on sheet 'Models.'" This issue is caused by the form variables being set when the utility is opened and then not updating when the user selects a different source File Group. Resolution: Corrected by changing the formula to force an update after a new File Group source value is selected.