



Release Notes
Axiom Capital Planning
Version 2020.2



KaufmanHall

AXIOM

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Contents

About the Release Notes	4
New features in 2020.2	5
Planning 2022 projects and beyond	5
What to know before upgrading	6
Preparing and scheduling upgrades	7
Getting help and training	8
Issues fixed in 2020.2	9

About the Release Notes

Kaufman Hall is pleased to announce the 2020.2 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.

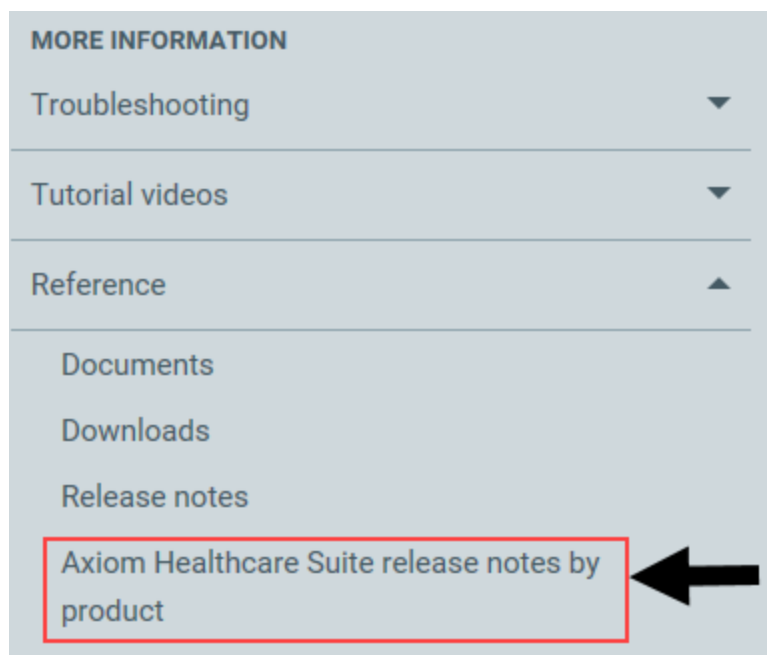
The purpose of these release notes is to provide you with the following:

- 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!** Accessing current and older release notes for Axiom Healthcare products

The online help for Axiom Healthcare products now includes a page with links to current and past release notes for the last several years. To access this page, [open the product online help](#), and navigate to the **More Information** section.



New features in 2020.2

Axiom Capital Planning delivers continued planning features and functionality to help your organization budget for future capital projects.

Planning 2022 projects and beyond

The new 2022 file group includes all drivers, calc methods, utilities, and templates used to manage the capital planning process for your organization.

NOTE: No new features have been developed for the 2022 file group for the Legacy (Excel) version of Axiom Capital Planning.

Planning 2022 projects and beyond

► Why use this feature

To plan for 2022 and future year projects, the new 2022 file group has been added to Axiom Capital Planning.

NOTE: No new features have been developed for the 2022 file group for the Legacy (Excel) version of Axiom Capital Planning.

► How this feature works

What: The new 2022 file group includes all drivers, calc methods, utilities, and templates used to manage the capital planning process for your organization.

Systems: Legacy only

Where: The 2022 file group is automatically included in the system.

Who: All Capital Planning users

How: There are several steps involved in moving your planning process to a new year. For the location in the online help that includes instructions that will walk you through this process, see the following section.

► Where to find more information

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

- "Rolling forward to a new capital budget year"

What to know before upgrading

IMPORTANT: You must apply the Axiom Software 2020.2 upgrade before applying any 2020.2 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 2020.2 *before* the first product upgrade. Refer to the **Axiom Software 2020.2 Release Notes** and **Axiom Healthcare Suite 2020.2 Release Notes** for considerations before upgrading.

When upgrading to the 2020.2 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.

Preparing and scheduling upgrades

Summary of the upgrade process:

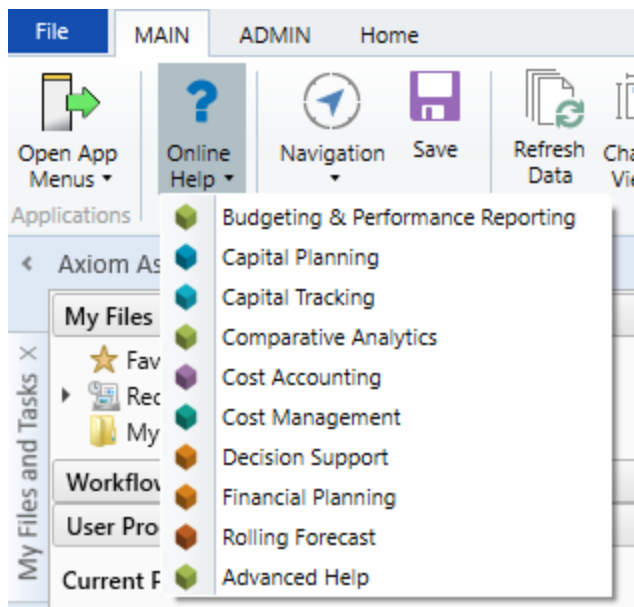
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support@kaufmanhall.com to schedule an installation date 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:

- **Windows and Excel Clients** - 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.



- **Form/Web pages** - Form/web-enabled features and products 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. To access the full Axiom Help system, click **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 2020.2

The following tables list the resolutions for issues addressed in 2020.2, released on July 20th, 2020:

Excel and Web systems

Issue	Description
Improve performance and usability of 2020.1 integration utilities built [TFS 47504]	Issue: Usability improvements could be made to the following utilities - CP to FP Transfer, CP to Budget Transfer, and CT to RF Transfer. Resolution: Corrected by adjusting several user interface elements, such as increasing grid and text sizing as well as verbiage changes.

Web system only

Issue	Description
PFB-08705 - Using Zero in a Required for Save Text Field [TFS 46818]	Issue: A user cannot submit projects with zero in the Required for Save text fields (such as Remaining Useful Life). The issue is that these are required text fields and the correct value will sometimes be zero. The system evaluates a zero as a no-answer and does not allow it. Resolution: Corrected by adjusting the text fields to not convert entered zeroes to blank fields.

Excel system only

No issues addressed in this release.