Release Notes

Axiom Budgeting & Performance Reporting

Version 2019.1.3

KaufmanHall

AXIOM

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Summary

Kaufman Hall is pleased to announce the 2019.1.3 release of Axiom Budgeting and Performance Reporting. 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 configuration updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

> **IMPORTANT:** Some features in this release require configuration after installation. For more information, see Manual configuration instructions.

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: Apply this update ONLY if you have already applied the release and completed all the manual setup steps from the corresponding release notes.

When upgrading to Axiom Budgeting and Performance Reporting, 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 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.

New features summary

This section includes a description for each new feature included in this release.

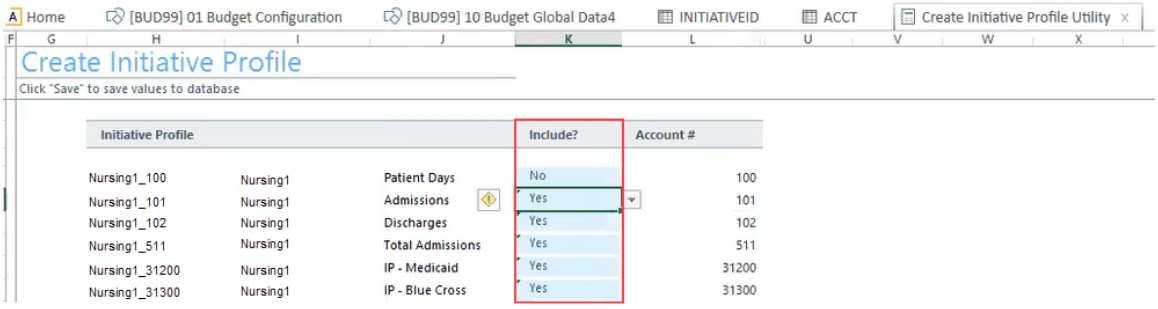
IMPORTANT: Some of the new features and resolved issues listed in this document have been included in the latest Prototype file group. You must create a new file group or update an existing file group to utilize the updated contents from the 2019.1 release. For instructions, see "Updating a file group" or "Rolling forward to a new budget year" in the Axiom Budgeting and Performance Reporting online help.

Initiative profiles

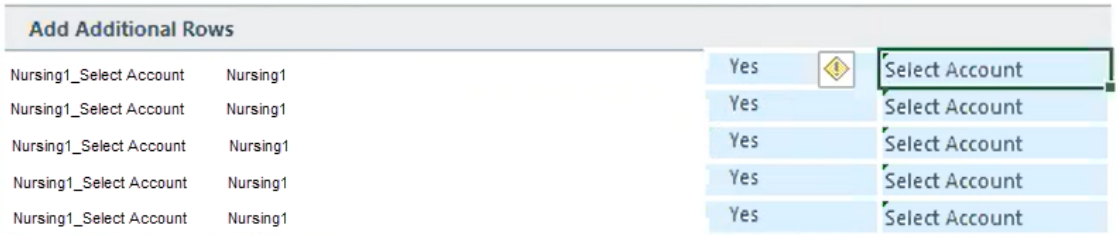
The Create Initiative Profile Utility is an optional feature that allows you to copy an account and/or calc method structure from an existing department and use it as your model for system or department initiatives. This saves time from having to add multiple accounts to each initiative. You can also create multiple profiles to use with your initiatives.

This utility includes three main sections:

- **Initiative Profile** - Includes the accounts from the department you select to use as a model for your initiatives.



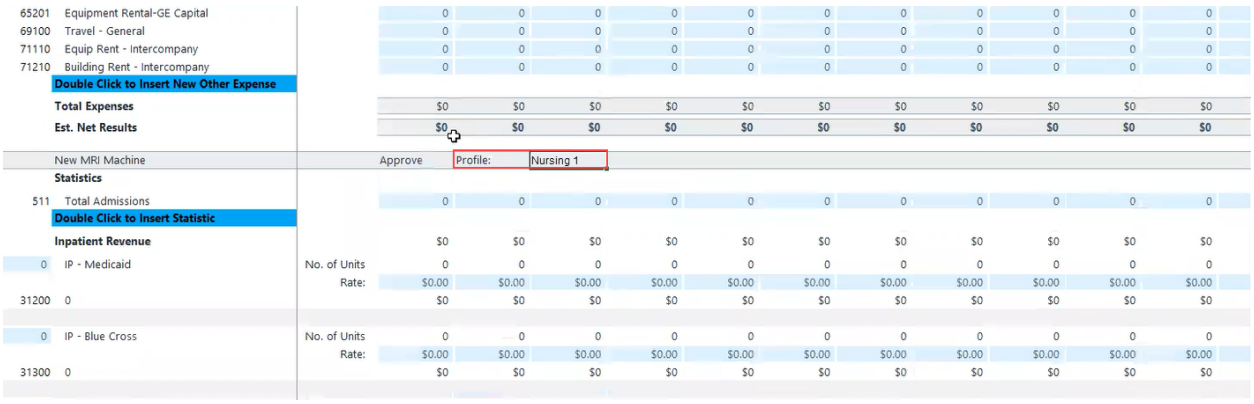
- **Add Additional Rows** - Allows you to add additional accounts not included in the model department you selected.



- **Results of Saved Initiative Profile for Edit** - Lists all of the accounts in the Initiative Profile section that you selected as well as any accounts you added in the Add Additional Rows section.

Results of Saved Initiative Profile for Edit				
Nursing1_101	Nursing1	Admissions	Delete	101
Nursing1_102	Nursing1	Discharges	Keep	102
Nursing1_511	Nursing1	Total Admissions	Keep	511
Nursing1_31200	Nursing1	IP - Medicaid	Keep	31200
Nursing1_31300	Nursing1	IP - Blue Cross	Keep	31300
Nursing1_31400	Nursing1	IP - Commercial	Keep	31400

When a user adds a new project in the Initiatives tab in the budget workbook, the system automatically inserts a block of the accounts you configured for the profile you set up in the Create Initiative Profile Utility. The user can still modify the initiative by adding more accounts, as needed, directly in the Initiatives tab, but using a profile gives the user a "running start" to complete entering the account information more quickly and easily. The profile used to populate the initiative also displays in the initiative header block next to the approval state.



IMPORTANT: Part of setting up initiative profiles includes accessing the INITIATIVEID dimension to add or edit initiatives available in budget workbooks. At this time, only users with the Bud Admin role profile can edit this dimension from Axiom Explorer.

For instructions, see "Setting up initiative profiles" in the online help.

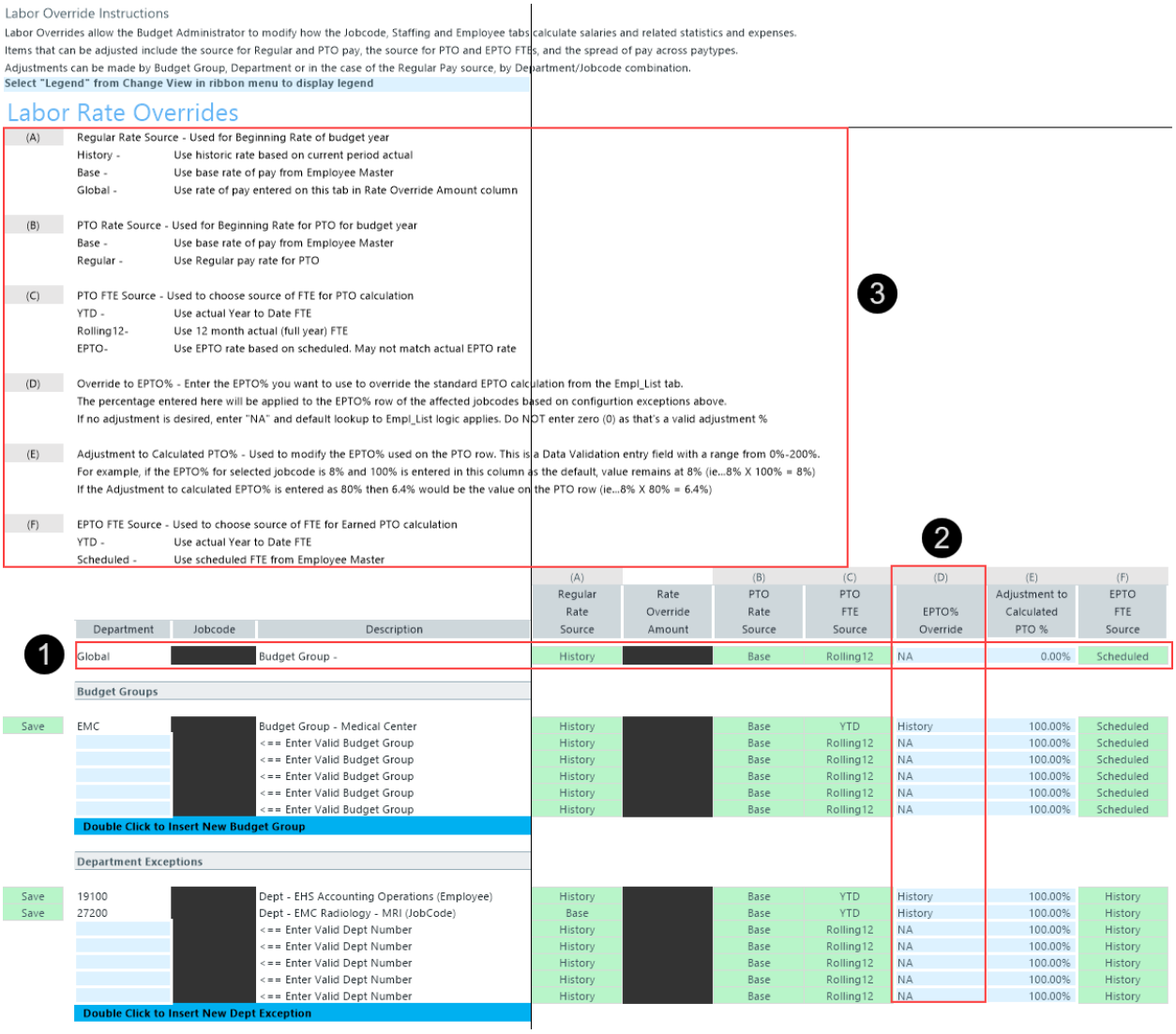
Enhancements to Budget Labor Override driver

The following updates have been made to the Budget Labor Override Driver:

1. **Global section** -The new global configuration row now allows you to set up overrides at the global level. This helps minimize configuration set up by removing the need to apply an override to each budget group or department.
2. **EPTO% Override** - This new column allows to override the standard EPTO calculation from the

Empl_List tab by entering a percentage, which the system applies to the EPTO% row of the affected job codes.

3. **Column legend** - The existing legend has been moved to a new Legend view for better accessibility. You can display or hide the legend from the Change View option in the Main ribbon tab, as necessary.

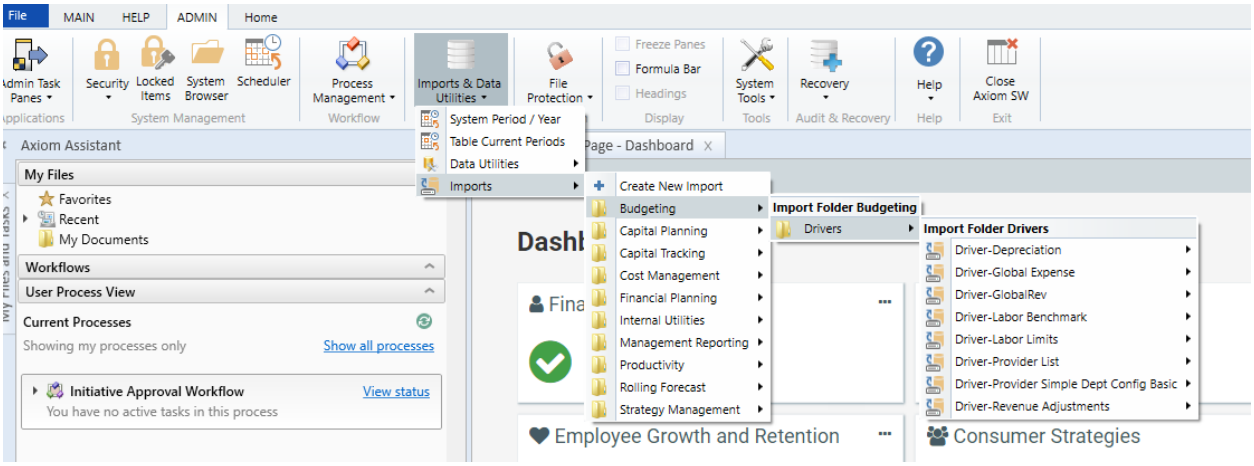


IMPORTANT: You may encounter an error message when you open the Budget Labor Driver after updating a 2019 or 2020 file group. If this happens, you will need to delete the underlying table before recreating the file group.

For more information, see "Budget Labor Override" in the online help.

Import data into driver tables

Axiom Budgeting now includes several imports that allow you to directly import data into selected driver tables to both initially configure your system for the new budget cycle and to update existing records in mass when needed. These new imports are located in the **Admin** task pane, under **Imports & Data Utilities > Imports > Budgeting > Drivers**.



The new imports include the following:

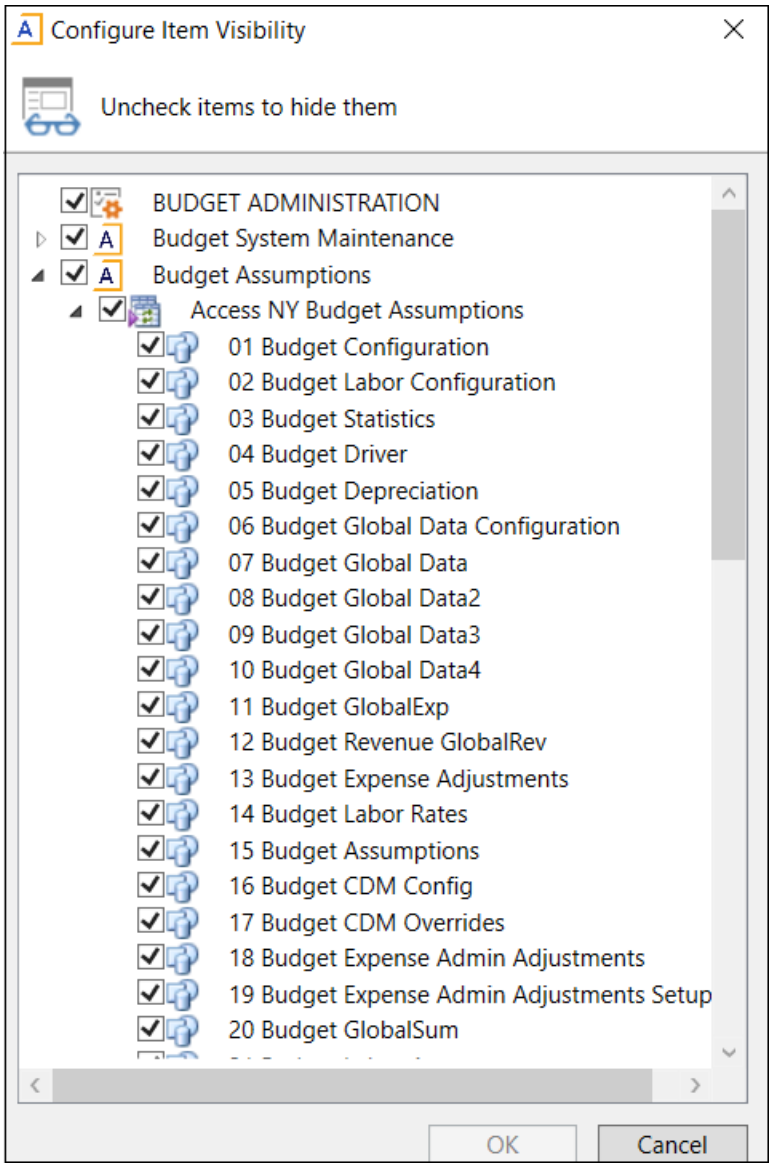
- Depreciation
- Global Expense
- GlobalRev
- Labor Benchmark
- Labor Limits
- Provider List
- Provider Simple Dept Config Basic
- Revenue Adjustments

IMPORTANT: There are some fields that are calculated in the driver, so opening and saving the driver is a necessary step after you import the data.

For instructions, see "Importing data into driver tables" in the online help.

Hide or display items in Bud Admin task pane

You can now control what items display in the Bud Admin task pane by using the new Configure Task Pane Item Visibility utility.



For instructions, see "Hiding or displaying items in the Bud Admin task pane" in the online help.

2020 and 2021 file groups available

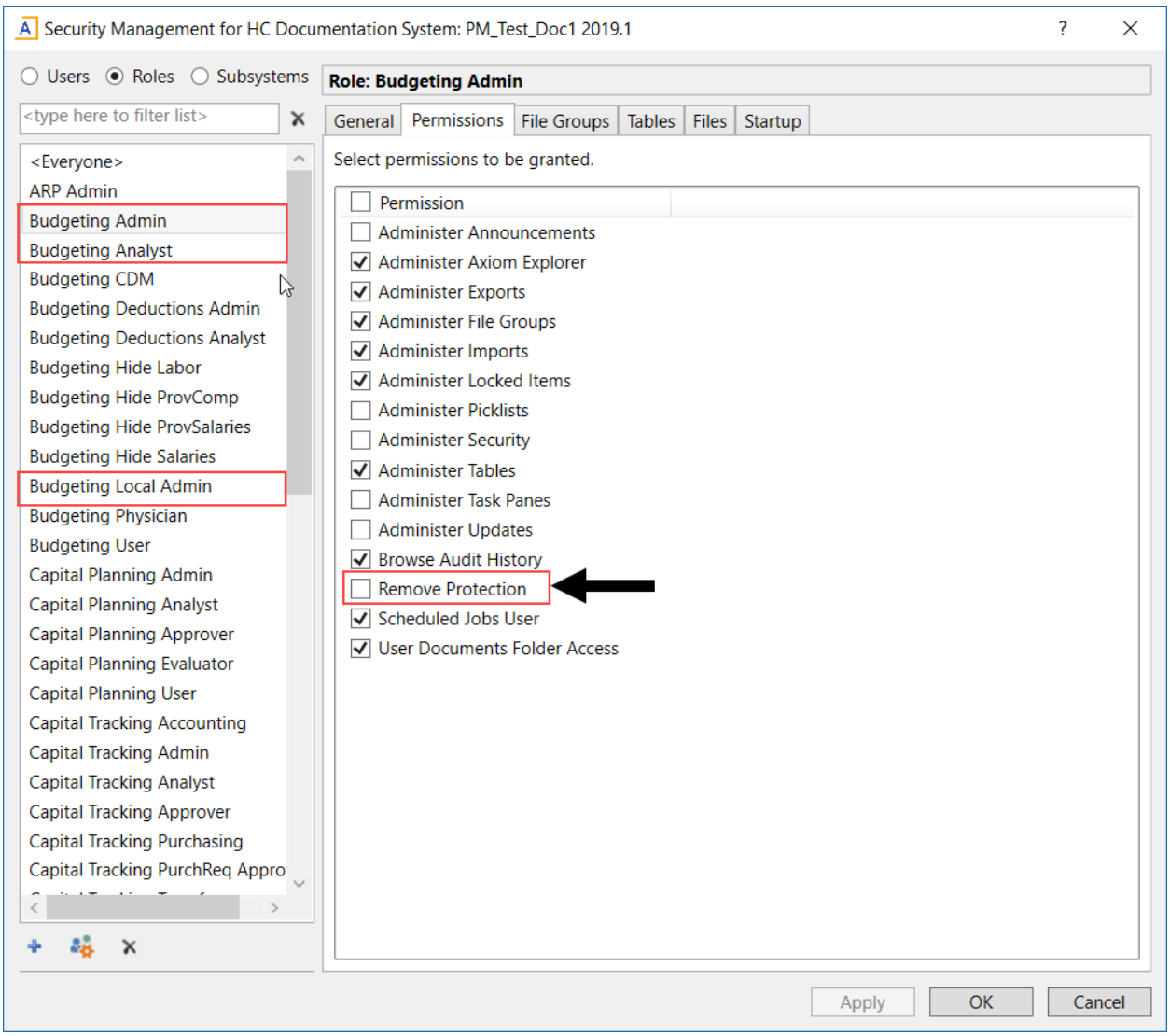
New 2020 and 2021 file groups are now available in the Bud Admin task pane.

To create a new file group for a new budgeting year, see "Rolling forward to a new budget year" in the online help.

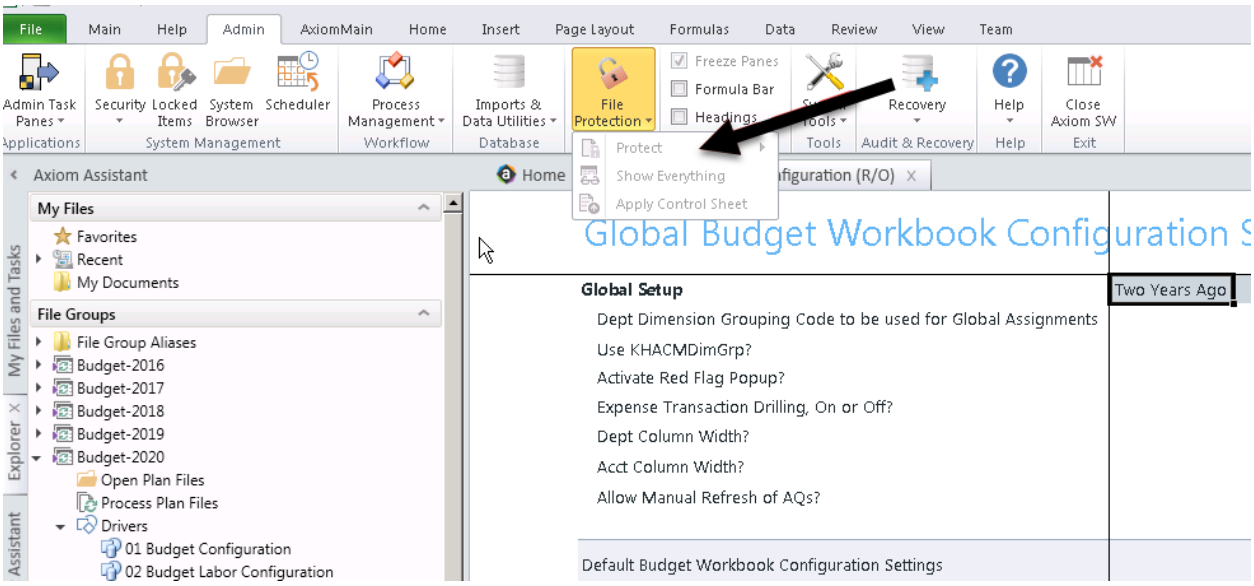
To update an existing file group, see "Updating a file group" in the online help.

Security changes

In 2019.1, we made important changes to how security affects the Budgeting Admin, Budgeting Analyst, and Budgeting Local Admin roles. In the Permissions tab of each of these roles, we have unselected the **Remove Protection** check box.

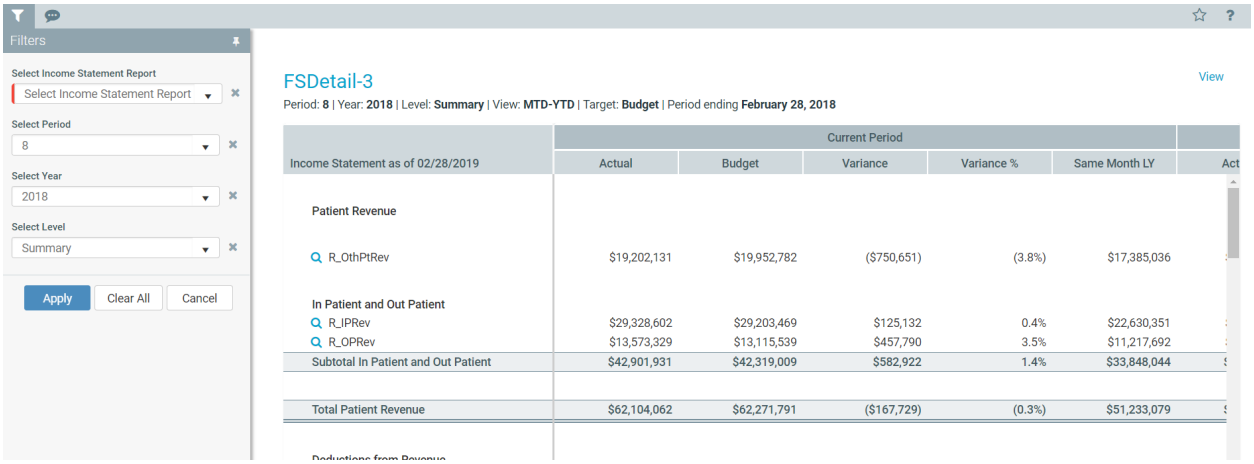


The most noticeable effect of this change is that users with these roles can no longer unprotect drivers.



Configurable multiview income statements

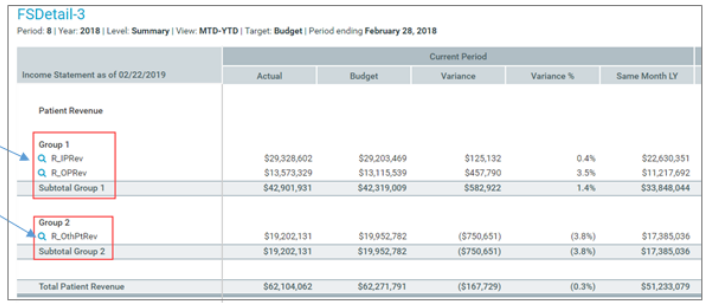
The new Income Statement Viewer allows users to view multiple income statement reports from an easy-to-use utility. Users can filter the reports by selecting the report to view along with other variables, such as the period, year, and level (summary or detail). They can also select the target as well as drill down to the line item detail level to view specific data.



Users with MR Admin and MR Analyst roles can create the income statements available in the viewer by creating income statement templates using the Income Statement Template Builder. For example, they can create a summary version of the income statement used by director-level personnel and create a detailed version template to meet the needs of those that need to see more details.

Income Statement Template Builder

Income Statement Viewer



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

- “Viewing income statements”
- “Working with income statements”
- "Creating or modifying an income statement template”

Mapping KHA Standard Class codes

As part of the development of future report tools and utilities, data needs to be standardized across accounts, departments, and so on. Part of this process includes mapping these items in your organization to KHA Standard Class codes.

Acct Standards Review

Account	Description	KHA Standard Classification	Account Type	FSSummary	FSDetail
0	Default ACCT	NotMapped	NA	NA	NA
1	Salary & Hours Analysis	NotMapped	Scenario	NA	NA
3	Paid Hours GL-Based Analysis	NotMapped	Scenario	NA	NA
4	Non Salary Assessment Supplies	NotMapped	Scenario	NA	M_NonLabor
5	Non Salary Assessment Drugs	NotMapped	Scenario	NA	M_NonLabor
6	Non Salary Assessment Purchased Services	NotMapped	Scenario	NA	M_NonLabor
7	Non Salary Assessment Other	NotMapped	Scenario	NA	M_NonLabor
8	Non Salary Assessment NonUsed	NotMapped	Scenario	NA	M_NonLabor
20	Total Labor Expense as % of Net Operating Revenue	NotMapped	Bmark	Bmark	BmarkNOR
21	Total Employee Labor Expense as % of Net Operating Revenue	NotMapped	Bmark	Bmark	BmarkNOR
22	Total Employee Salary Expense as % of Net Operating Revenue	NotMapped	Bmark	Bmark	BmarkNOR
23	Overtime Salary Expense as % of Net Operating Revenue	NotMapped	Bmark	Bmark	BmarkNOR
24	Contract Labor Expense as % of Net Operating Revenue	NotMapped	Bmark	Bmark	BmarkNOR
25	Benefits Expense as % of Net Operating Revenue	NotMapped	Bmark	Bmark	BmarkNOR
26	Total Supply Expense as % of Net Operating Revenue	NotMapped	Bmark	Bmark	BmarkNOR
27	Medical Supply Expense as % of Net Operating Revenue	NotMapped	Bmark	Bmark	BmarkNOR

NOTE: This process will benefit your organization in the future by providing more detailed data and reporting capabilities. Once complete, you should only need to update these reports when you add new accounts, departments, etc.

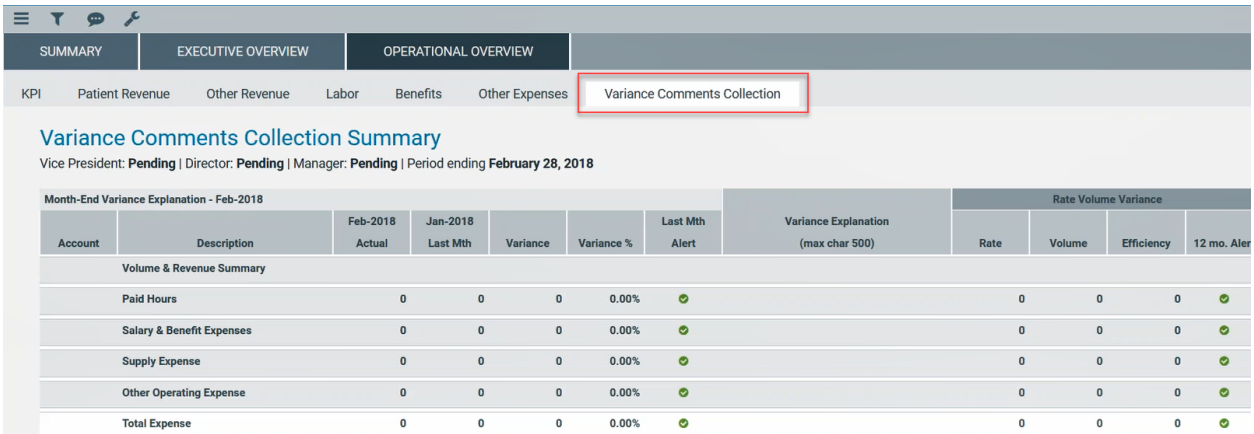
For more information, see "Mapping KHA Standard Class codes" in the online help or in the Manual setup instructions of this document.

Variance Comments Collections reports

Starting with version 2019.1 of Axiom Performance Reporting (and Axiom Budgeting), the Excel version of the Variance Comments Collection reports will no longer be supported. You can continue to use these reports, but no new enhancements or fixes will be developed for these reports.

NOTE: If you are a new client to Kaufman Hall and taking part in a new installation, the Dept Variance report will not be included in your product.

We encourage you to use the new Variance Comments Collection tab in the Month End Review dashboard instead.

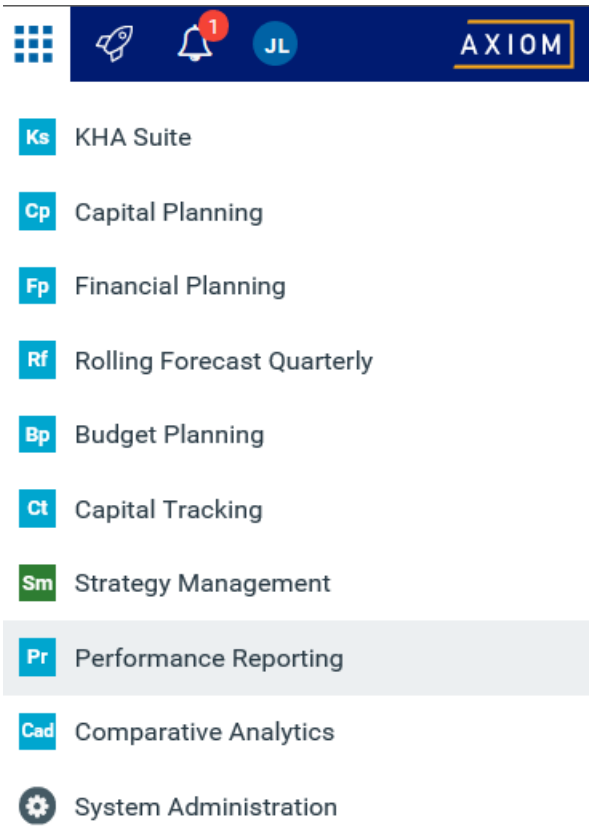


For more information, see "Understanding the Month End Review dashboard" in the online help.

Performance Reporting web home page

The Axiom Performance Reporting web home page has been updated to provide direct access to the Month End Review dashboard.

After you log in, you can navigate to this page by clicking **Performance Reporting** in the Area menu in the Global Navigation Bar:



For more information about the dashboard, see "Understanding the Month End Review dashboard" in the online help.

Issues resolved in 2019.1

The following tables list the resolutions for issues addressed in 2019.1, released on April 1st, 2019:

Driver, template, calc method, and other updates

Calc Methods

Location	Description
PFB-05815 - Incorrect calculation for Dollars Only CM on Staffing Tab [TFS 16501]	**Symptom:** There is an error in the calc method for Dollars Only pay types. The system seems to be calculating at about 50% of the current YTD rate due to values in LumpSum. **Resolution:** Corrected by updating the Jobcode calc method. Updated cell DM10 to remove calculated query criteria.
PFB-06137 - INDEX formula range in provider tab of the workbook [TFS 19212]	**Symptom:** The INDEX formula range in the Provider calc method (gross charge section) only goes to a certain point/row (Row 19227). Since some clients' provider workbooks have rows beyond the 19227 in the Provider tab, when the workbook is processed, the result is thousands of errors (#ref errors). **Resolution:** Corrected by modifying the range of the index formulas for the affected calc methods to go through 35000.
PFB-06524 - Bad Debt CM [TFS 25516]	**Symptom:** In the Stat_Rev calc method library, the BadDebt calc method includes an incorrect formula in column BB. Also, cell E614 does not reference a value that can be used by the GetData and return the desired results for the correct budget group. **Resolution:** Corrected by updating the formulas in column BB and cell E614.
PFB-06657 - Earned Paid Time Off description on Employee tab [TFS 26082]	**Symptom:** When Earned Paid Time Off is set to No in the Budget Labor Configuration driver, that row description changes to Accrued PTO rate from Configuration in the plan file Jobcode tab. However, in the Employee tab, the description does not change. It remains Earned Paid Time Off'. **Resolution:** Corrected by updating formulas in the Jobcode calc method.

Location	Description
PFB-06658 - Staffing tab not fully KHABGTMAP compliant [TFS 26083]	**Symptom:** When using the Jobcode or Add New Jobcode calc methods on the Staffing tab, it appears these calc methods are not fully KHABGTMap compliant, which is different from the Jobcode tab. Column EW reflects the correct department when bringing in job codes via process plan files, but in columns CK and CL where you have the dept_account listed to flow payroll to the Expense tab, it incorrectly uses the department of the workbook. **Resolution:** Corrected by updating the Jobcode calc method.
PFB-06404 - Red Flag formula in plan files [TFS 26267]	**Symptom:** On the Stat_Rev tab column W, the red flag formula in the calc method appears to only reference the Revenue thresholds. There is a section for the Revenue thresholds as well as Statistics thresholds up above, but all calc methods only refer to the percent and dollar thresholds in the Revenue section (cells V66, V67 and V68). **Resolution:** Corrected by updating the Statistic and Statistic_Oth calc methods Red Flag formulas.
PFB-06708 - Employee Tab - New employee merit increase not working [TFS 26696]	**Symptom:** The system does not apply the intended merit increases to new employees added to the employee tab after the initial build. **Resolution:** Corrected by updating the Add New Employee calc method to recognize the same configured merit.
PFB-06766 - URGENT: Incorrect cell ref preventing merit exception from being picked up [TFS 29945]	**Symptom:** When using job class exceptions in the Labor Rates driver, they are not picked up because of an incorrect cell reference in column HK for the Jobcode calc method block on the Employee tab **Resolution:** Corrected by updating the cell HK formula in the Jobcode and Add New Jobcode calc methods.

Location	Description
PFB-06987 - Provider Projected FTE change not flowing to Provider tab [TFS 30192]	**Symptom:** Within a provider block of the Provider tab, Column K "FY Projected" on the "Total FTE from Provider Comp" row pulls the budgeted instead of projected FTE from the Provider comp. **Resolution:** Corrected by updating the formula in the following calc methods: • Provider Detail • Add New Provider Detail • Copy From Existing Provider • Add New Provider Detail from Utility
PFB-06826 - Incorrect formula in Oth_ Per_Unit Projected column [TFS 30891]	**Symptom:** The Projected Column formula in the Oth_Per_Unit calc method refers to row 59, which is the IP Stat row. **Resolution:** Corrected by updating the formula to refer to cell 61 in column I in the Oth_Per_Unit calc method.
PFB-06796 - Column AY formula in STAT_ REV Detail calc method is incorrect [TFS 30892]	**Symptom:** The third and fourth rows of the Detail calc method on STAT_REV do not spread correctly when selecting "History" in the spread method in column T. The formula continues to spread evenly rather than based on the historical spread from the DEPT_HISTORY tab. **Resolution:** Corrected by adding "History" to the drop-down in column T for the Add New Detail calc method on Stat_Rev for line references.
PFB-06789 - BUDComments in STAT_REV not saving to BUD Detail table [TFS 30899]	**Symptom:** The formulas in column BF of the Detail block calc method are missing from the Detail rows in the block. Therefore, comments entered in column X are not picked up in column BF and saved to the BUD Detail table. **Resolution:** Corrected by updating the formulas in the Detail, Add New Detail, and Add Detail Input Total calc methods.
PFB-06313 - When using the Revenue_ Stat Calc Method, formulas resolve to #DIV/0 when Index Range value result is 0 [TFS 30911]	**Symptom:** When using the Revenue_Stat Calc Method, formulas resolve to #DIV/0 when Index Range value result is 0. **Resolution:** Corrected by updating the formulas Z:AK in the Revenue_Stat calc method.

Location	Description
PFB-06843 - Red Flag pop-up does not work on Detail Methods [TFS 31259]	**Symptom:** When activating the Red Flag pop-up upon save on the Budget Configuration driver, it was noticed that the Detail calc method does not allow comments to clear the flag. **Resolution:** Corrected by updating three calc methods on the Expense calc method library and on calc method on the Stat_ Rev calc method library to allow users to enter comments.
PFB-07204 - Other Dollar Paytypes not coming into the ProviderComp tab [TFS 31533]	**Symptom:** When using the Provider Comp tab, if you are using a KHABGTMapped dept, additional Other Pay (AQ3) does not come into the PC block for the query due to a bad sectional filter. **Resolution:** Corrected by updating the formula in the Add New Provider calc method.

Drivers

Location	Description
PFB-06453 - Budget GlobalRevenue Driver [TFS 26089]	**Symptom:** When reviewing the Global Revenue Reconciliation report, the system displayed accounts not budgeted as Global Revenue. The issue related to needing to add Dept.KHADimGrp to Global Revenue driver data filter. **Resolution:** Corrected by updating cells E61:63 in the Variables tab to include use of Dept.KHADimGrp.
PFB-07016 - Labor Rates Override Driver [TFS 29973]	**Symptom:** When working with the EPTO calculations, reviewing items in the labor rates override driver, there is a discrepancy in the EPTO FTE Source column. For the budget group section, there is the option in the drop-down of Scheduled or YTD. However, when setting up the Department Exceptions, in the same column, there are the options of History or YTD. **Resolution:** Corrected by updating the Data Validation drop-downs for the three DEPT calc methods by changing the selection from "History" to "YTD".

Location	Description
PFB-06802 - BP Labor Override Driver - edit default values [TFS 30893]	**Symptom:** Updated default settings in the Budget Labor Override driver. Currently, for PTO FTE Source, this is listed as YTD; Paytype Distribution Overrides for Prod 2 is 0.00%. **Resolution:** Corrected by doing the following for Global, Budget Group, and Dept sections: • Changed the PTO FTE Source from YTD to Rolling 12. • Changed the Pay Type Distribution Overrides for Prod Overtime (Prod 2) from 0.00% to History. Template and all calc methods were updated for these new defaults. Column V defaults to "Rolling12" and column AB-AK default to "History".
PFB-06765 - Missing cell references in Global Setup section for Budget Configuration Driver [TFS 30906]	**Symptom:** In the Budget Configuration driver, there is an issue in the Global Setup section (above the Global section). If you change the value of the items below, it saves the value to the database, but when the user closes and reopens the driver, it looks like it has reverted back. a. Activate Red Flag pop-up **Resolution:** Corrected by updating cell Y35 in the Budget Configuration driver.
Budget Configuration driver - Global section not locked [TFS 30744]	**Symptom:** The global section of the Configuration tab should only be editable by someone with Global Admin rights. **Resolution:** Corrected by updating the formula in cell D13 in the Variables tab.

Tables

Location	Description
PFB-07185 - ColumnSequenceItem when upgrading Budget and PR products to 2018.4 [TFS 31453]	**Symptom:** Encountered several errors when upgrading the Axiom Budgeting and Performance Reporting to 2018.4.1 as well as from 2018.2 to 2018.4. **Resolution:** Corrected by moving columns FTE{1…} and FTEYTD {1…} and column sequences FT1 and FTYTD1 for each table.

Templates

Location	Description
PFB-06505 - ProviderComp tab does not have place to enter FTEs for the Contract Labor JobCodes at the top of the tab [TFS 25520]	**Symptom:** The Provider Comp tab in the 2018.1.1 budget plan file does not have place to enter FTEs for the Contract Labor JobCodes at the top of the tab. **Resolution:** Corrected by updating the format to editable cells on ProviderComp Master.
PFB-06511 - Initiatives Default Dept [TFS 25522]	**Symptom:** In the Initiatives tab of budget plan files, all initiatives records default to the plan file department, so a user cannot input initiatives for additional departments that are also mapped to that same plan file. Revenue, expenses, and job codes allow for saving back to the various mapped departments, but initiatives do not. **Resolution:** Corrected by adding a refresh variable for the department on the Initiatives tab to recognize KHABgtMap departments.
PFB-07027 - 22 Budget Labor ADCConfig driver does not allow user entry in shift grids [TFS 29925]	**Symptom:** Instructions for the 22 Budget Labor ADCConfig driver indicate you should enter shift hours in shift grids 2 and 3. However when attempting to do so, the system displays the following error: Locked cells cannot be modified when protection is enabled **Resolution:** Corrected by updating the formula in cells AI32 and AY32 in the following calc methods: • Budget Group Exception • Dept Exception • Global ADCConfig • New Budget Group Exception • New Dept Exception
PFB-07045 - Provider Tab: Gross Revenue Projections are 0 likely due to new AQs 14-16 [TFS 30580]	**Symptom:** During the plan file build, the query (Gross Revenue) does not refer to the calc method for revenue but instead uses the calc method for Add New Revenue. **Resolution:** Corrected by updating the query formulas for AQ14 to include the same NOT IN filter used with AQ7 so that the correct providers are now excluded from the query.

Location	Description
PFB-06864 - JobCodeADC Hours do Not Match [TFS 30882]	**Symptom:** The rows on the JobCodeADC tab do not align with the formulas to calculate Paid Time Off Trends. The Historic Non Prod % rows are out of sync after the first section. **Resolution:** Corrected by aligning the formulas in columns CN:CZ for job classes 2-15 so that the "Historic Non Prod %" rows (G:S) will reference the correct locations.
PFB-06780 - Incorrect formula for total FTEs when using JobCode.StdHours [TFS 30896]	**Symptom:** The calc method for FTEs in columns S:AE of the JobCode tab should have conditional logic that looks to the appropriate FTE denominator based on whether the JobCode was calculated with the Default FTE hours or 2080 hours (similar to how the hours are calculated in AG:AR). In the case where the StdHours option is set to "2080 hours," the reference used should be to row 49 not 48. **Resolution:** Corrected references to the "Hours per period" (row 48) to look at the setting for the yearly hours to use. The formula change was applied where applicable to the Jobcode, Employee, and HHlabor calc methods.
PFB-07157 - Missing Total Projected Provider Volume on Add New Provider Comp Block [TFS 30910]	**Symptom:** When using the Add New Provider comp block on the Provider Comp tab in the budget workbook, the total projected volume in column 0 is missing. **Resolution:** Corrected by updating column 0 for Total Projection to use YTD+Remaining Projection.
PFB-07161 - Total Salaries Format [TFS 30917]	**Symptom:** In the Expense tab, cell M87 should be formatted with 2 decimals like the rest of the column. **Resolution:** Corrected by changing the cell formatting to two decimals.
PFB-07188 - Employee level hours and dollars not interfacing into employee rows [TFS 31228]	**Symptom:** When processing the Employee labor method, the hours and dollars for the individual employee no longer shows on the Employee row and now defaults to the Float/Inactive row. **Resolution:** Corrected by updating the batch sequence for the affected AQ.
PFB-07068 - Provider Comp PayrollGLMapping [TFS 31246]	**Symptom:** In the ProviderComp tab, queries are set to inactive because the formulas reference an incorrect row. **Resolution:** Corrected by updated the formula to reference the correct row.

Location	Description
PFB-07214 - Batch Sequence causing database omission on recalc for ProviderComp and Provider [TFS 31807]	**Symptom:** A recalc on a provider plan did not update to the BUD2020 table. It was noted that the PayrollGLMapping accounts did not populate in the plan file via the Recalc job run in Scheduler, yet the plan file would refresh on open when opened via Open Plan Files location. **Resolution:** Corrected by modifying the batched queries in the Provider tab.
PFB-07257 - Budget Labor Rates Driver not flowing into the Empl_list sheet [TFS 32811]	**Symptom:** Exception at that job code level or the job class level are not flowing through over to the Empl_List sheet within the plan files. More specifically, the Effective Date, the Annual Inc %, and the Market Inc% for the Budget Merit and Budget Market within the Budget Labor Rates driver does not populate within the Empl_List sheet. **Resolution:** Corrected by updating the batched queries for the Empl_List and the Labor Rates tabs.
Labor Overrides Order of Precedence error [TFS 30795]	**Symptom:** On the Jobcode and HHLabor tabs, the Labor Overrides data logic in the range AG29-AJ42 seems erroneous. It is expected to pick up the values from the range AH63-AY68 based on the most defined criteria (Dept first, Budget Group second, Global third). Resolution: Corrected by updating the formulas in cells AG29-AJ42.

Utilities

Location	Description
PFB-06503 - Dimension Maintenance Utility does not recognize Budgeting Local Admin role [TFS 25529]	**Symptom:** The Dimension Maintenance Utility does not recognize Budgeting Local Admin role. **Resolution:** Corrected by updating the Dimension Maintenance Utility to recognize the Budget Local Admin role.
PFB-07167 - Formula errors on Budget Deductions Utility (rebuildable version) [TFS 31034]	**Symptom:** There are several formula errors within the rebuildable Budget Deductions model. **Resolution:** Corrected by updating several formulas in the Budget Deductions tab.

Location	Description
Period System Settings: Remove Explorer access and Read/Write for this asset from BP Subsystem [TFS 29655]	**Symptom:** Users should not access the Period System Settings using Explorer because it shows the underlying components and not the form itself when launched from Explorer. **Resolution:** Corrected by removing the Explorer access for this asset from the Budgeting subsystem. Instead, the asset can now be accessed from the BP Admin task pane. Also, removed the read/write permissions from the subsystem.

Report updates

Management Reporting and Utilities

Location	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Budget Variance By Dept.xlsx	**Issue:** PFB-04466 - Budget Variance Report by Dept does not display Mgr/Dir names when run multipass [TFS 7493] **Symptom:** To make this report update Director and Manager names for each iteration in MultiPass, yet also bring in the Director and Manager names in normal refresh variable use (and return "ALL" if no refresh variable is selected), the following must be modified: • DEPT.Manager and DEPT.Director must be added to the Control_FileProcessing Source Columns • Two new RelatedColumnValue refresh variables have to be added, one for DEPT.Manager, one for DEPT.Director • IF Statement logic must include GetCurrentValue ("DEPT.Manager") and GetCurrentValue("DEPT.Director") To confirm the solution works, the report must be tested on file open (without refresh), file open and manual refresh using refresh variables, and on MultiPass (over 10-20 iterations for enough variety). **Resolution:** Corrected by making several formula changes as well as enabled/disabled specific features in the control sheet.

Location	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** PFB-06037 - Pay period formula on EmpID sheet in Dept Monthly [TFS 18443] **Symptom:** The current formula on row 5 of the EmpID sheet in Dept Monthly Package is incorrect. **Resolution:** Corrected by updating the formula.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** PFB-06221 - Dept Monthly Package will not produce Charts when run Multipass [TFS 19933] **Symptom:** Two issues noted with the Department Manager Monthly Package (All in One) when it is prepared with Multipass: 1. The Configuration tab allows you to select which report tabs to include in the operation section. Regardless of what you select for the cover (cell E10), the system always produces the cover. This is not always desired since the client may use the components of this report in a larger monthly package. 2. When the file is populated with a Refresh, the data on the Charts tab appears to be correct, but when the file is processed with Multipass, the Charts tab does not populate. Resolution: Corrected by doing the following: 1. Updated the formula in cells K6:K17. 2. Issue could not be reproduced and appears to be functioning properly.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Variance Alert.xlsx	**Issue:** PFB-07253 - The Variance Report fails when running multipass [TFS 32743] **Symptom:** The Variance Report fails when running multipass. **Resolution:** Corrected by updating several formulas.
\Axiom\Reports Library\Management Reporting Utilities\Data Reconciliation\Reconcile GL to GLTransactions.xlsx	**Issue:** PFB-05570 - Reconcile GL to GLTransactions missing accounts **Symptom:** Some clients could not get their GL to GLTransactions to balance. **Resolution:** Corrected by updating the query.

Location	Description
\Axiom\Reports Library\Management Reporting\Analysis\CYA Per Unit Analysis.xlsx	**Issue:** PFB-06186 - Performance of CYA Per Unit Analysis report [TFS 20178] **Symptom:** When attempting to refresh the \CYA Per Unit Analysis.xlsx report in the Excel client (with Excel 2013), the report times out on AQ1. **Resolution:** Corrected by updating the query data filter.
\Axiom\Reports Library\Management Reporting Utilities\Data Input\Input BiWeekly Contract Labor.xlsx	**Issue:** PFB-06561 - Input BiWeekly Contract Labor gives warning about cannot change protected cells [TFS 25505] **Symptom:** The Input BiWeekly Contract Labor report includes a defect where the bottom section displays a message suggesting that you can edit already entered departments, but the cells are protected, by default. **Resolution:** Corrected by updating the formatting for the AQ1 control row similarly to the first row of AQ2 strictly for the HoursX columns.
\Axiom\Reports Library\Management Reporting Utilities\Data Input\Input Monthly Statistics.xlsx	**Issue:** PFB-06335 - Input Monthly Statistics Utility is not refreshing correctly when different years are selected [TFS 30090] **Symptom:** There is conditional logic in the Input Monthly Statistics utility that turns of AQ1 when data fields are updated for existing stats (within AQ1). The logic appears to be extraneous. **Resolution:** Corrected by updating formulas in the report and the control sheet.

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Payroll\Monthly to GL.xlsx	**Issue:** PFB-06930 - Monthly to GL Payroll Utility not picking up correct acct for rolled up paytypes [TFS 30570] **Symptom:** When using the Monthly to GL Payroll Utility, it does not pick up accounts from the Payroll GLMapping table correctly when transferring the hours or dollars to the ACT table. Many times pay types are rolled up to other pay types for budgeting, but the actual dollars and hours are still charged against the pay type being rolled up. As a result, it may go to the wrong account when transferred from ActPay12_20XX to ACT20XX. **Resolution:** Corrected by updating the query controls to use either the Paytype.Jobcode, Paytype.Employee, Paytype.Staffing, or Paytype.Provider columns depending on which method is being used for the department in DEPT.LaborType. In the case of the Paytype.Provider, it is dependent on Jobcode.KHAINT=Provider.
\Axiom\Reports Library\Management Reporting\Report Packages\Executive\Variance Overview.xlsx \Axiom\Reports Library\Management Reporting\Report Packages\Executive\Executive Monthly Package.xlsx	**Issue:** PFB-06438 - Variance Overview Bad Filter [TFS 30044] **Symptom:** The Variance Overview report under Management Reporting includes a bad sheet filter if there is nothing to enter in the second part of the disjunction. **Resolution:** Corrected by updating several formulas in the Report tab.
\Axiom\Reports Library\Management Reporting\Report Packages\Executive\Executive Monthly Package.xlsx	**Issue:** PFB-07047 - Executive Monthly Package - Variance Overview tab: no summary data [TFS 30236] **Symptom:** The Executive Monthly Package displays 0 instead of data for Last Year, Last Month and 3 mth avg selections for summary accounts. **Resolution:** Corrected by doing the following: • Adjusted formula in hidden column for "Same Month LY YTD Diff". • Added additional logic to ACTXXXX.YTD1 (last year) to utilize a GetData, if Summary Level code.

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Payroll\BiWeekly to Monthly.xlsx	**Issue:** PFB-06340 - Biweekly to Monthly Report multipass setting using department number as pay cycle [TFS 30078] **Symptom:** In the Biweekly to Monthly utility, a formula in cell I29 on the Variables tab controls the pay cycle. The formula is set to pull in the multipass list when multipass is used. The source column for the multipass settings is Dept.Dept, which causes the pay cycle to reflect as department numbers and not the correct pay cycle when run multipass by Entity. This results is that the system cannot post the data to the database for both dollars and hours as it would overwrite data incorrectly. **Resolution:** Corrected by updating the utility to pull data from Dept.Entity instead of Dept.Dept as well as updated SaveTagCustom accordingly to reflect the Entity number when run multipass.Corrected by updating formulas in several tabs and the control sheet. This change was implemented to improve performance. **IMPORTANT:** In the first year of processing, there is some potential for orphaned data in the system if you previously ran the report by DEPT.DEPT because the save tag will only replace data for the new ENTITY savetag. This will only be an issue where the data previously saved no longer exists as it will not be updated or deleted. Please review ACT_Pay12_YYYY for the year you are running this report. Furthermore, if you use a custom version of this report, the new savetag may conflict with your report. Either continue to use your existing report, review the data for the custom savetag label, or run the updated report in the first pay period of a new year.
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Input\MultiDept Variance.xlsx	**Issue:** PFB-07240 - Bad Alert Flag Filter on Multi Dept Variance Report **Symptom:** When using the MultiDept Variance report, you can toggle between Required Comments, All Red Flagged Comments, or All Comments. However, in 2018.4, it seems that this has no effect as the filter for AQ1, which resides in MultiDept_Variance!B17 and MultiDept_Variance!B18 has a hardcoded reference of Alert Flag = 1. **Resolution:** Corrected by updating missing logic in the query.

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecasting Utility	**Issue:** PFB-06530 - Modifications to Monthly Forecast Utility [TFS 24106] **Symptom:** After running the Monthly Forecast Utility, a client noticed that one department had its data zeroed in CYF2018. They ran it using multipass on the 27th, which saved the department data, and then ran it again in the 30th, which zeroed the data. **Resolution:** Corrected by updating the savetags with the correct suffix to include the DEPT.KHABGTCODE. **IMPORTANT:** If you have run this report previously and are running it for the current year, you may have orphaned data after running this report. Please review records with old save tag value for relevance.

Productivity Reporting and Utilities

Location	Description
\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Department\Daily Productivity Trend Report.xlsx	**Issue:** PFB-06109 - Daily Productivity Trend Report Calculation Issue [TFS 20180] **Symptom:** In the Daily Productivity Trend Report, under the "Variance Analysis" for FTEs, the report takes the hours variance and divides 40/7 (5.714). While 40 hours are often spread throughout the week, and not just 5 days, a problem occurs when corporate or back-office support departments are calculated the same way. On a daily level, this would work, but for the total bar, the report is summing all of the FTE variances tighter. This skews the variances on a daily level and then inflates both the total bar and the daily average bar in terms of FTE variance (since to that department an FTE is 8 hours per day, not 5.714). **Resolution:** Corrected by adding a note, as described to the Instructions worksheet, that the daily productivity totals are based on a 40-hour work week.

Location	Description
\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Executive\Daily Productivity Performance.xlsx	**Issue:** PFB-06685 - Daily Productivity Performance print settings [TFS 29803] **Symptom:** Print view needs to be corrected. The print is too small. **Resolution:** Corrected by center aligning the Dept header and left aligned the period/date formula. Other print settings still look fine related to the original description.
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend Report.xlsx	**Issue:** PFB-06440 - Productivity Trend Report **Symptom:** Update the L25 formula to =GetData ("Dept.KeyStatDesc",L10,,,,"NA") **Resolution:** Corrected the formula by making the suggested edits.
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend Report	**Issue:** PFB-07117 - Productivity Trend Report - Formula Error [TFS 30816] **Symptom:** The Productivity Trend report has a formula error in the YTD Total row and columns L, M, O, and R. **Resolution:** Corrected by updating the formulas in cells L55, M55, R55, and O55.
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend Report.xlsx	**Issue:** PFB-07200 - Productivity Trend report - Getdata formula that returns an error in both the windows and Excel client in cell L25 [TFS 31894] **Symptom:** In the Productivity Trend report, there is a Getdata formula that returns an error in both the windows and Excel client in cell L25 (for the column header). **Resolution:** Corrected by adjusting formulas in the Report and Variables tab.

Location	Description
\Axiom\Imports Library\Productivity\Daily Productivity\Load Daily Hours.axi	**Issue:** PFB-06396 - Delete records transform step in Load Daily Hours import [TFS 29843] **Symptom:** The final transform step in the standard Load Daily Hours import does not work. **Resolution:** The existing transform step works correctly. Removed the "(FIX ME)" content in the transform description, but the transform remains disabled. (Note: The imports need to be adjusted for each client, and this will not overwrite existing implementations but will serve as a template for new implementations).
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend with Graph.xlsx	**Issue:** PFB-06745 - Productivity Trend with Graph Year Formula Error [TFS 29805] **Symptom:** The Productivity Trend with Graph report is pulling the wrong year tables for Budget data in columns H through O. **Resolution:** Corrected by making the following changes to the Report tab: • Added a reference in G18 to reference the prior year BUD_PAY27 table name from Variables (similar to G6). • Added formulas in H18:P18 to determine the appropriate BUD_PAY27 table to use (similar to H19:P19). • Updated formulas in H13:P14 to reference the BUD_PAY27 table name calculated in H18:P18 (similar to H15:P16).

Location	Description
\Axiom\Reports Library\Productivity Utilities\BiWeekly\Report Batches\Biweekly Productivity Reports Batch.xlsx \Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend with Graph.xlsx	**Issue:** PFB-06939 - Productivity Trend with Graph Report [TFS 29709] **Symptom:** The Productivity Trend with Graph Report does not include a Batch Variable for Select Target Source, so when the batch is run, the Productivity with Graph report will have no Target line. In addition, on the Biweekly Productivity Reports batch, a refresh variable needs to be added for the Target (Budget/Benchmark) so that it is added to the Batch Variables column. **Resolution:** Corrected by doing the following: • On the Control_FileProcessing tab, added "BatchTarget" variable referencing affiliated refresh variable [SelectedValue] or defaulting to "Budget". • On the Report tab, redirected all references to Target refresh variable [SelectedValue] to one cell located in the dev work area and redirected the single instance (see previous bullet) that formerly referenced the Target refresh variable [SelectedValue] to reference the NEW "BatchTarget" variable on the Control_FileProcessing tab.
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Trended Paid Hours By Employee ID.xlsx	**Issue:** PFB-06441 - Productivity Trended Paid Hours by Employee ID [TFS 29800] **Symptom:** The query filter should be PayType.FTE=Yes. The current filter of JOBCODE.KHAInt.KHAINT <> 'NA' will include hours for nonFTE related pay (KHAINT=JobCode and KHAINT=Dollars) **Resolution:** Corrected by appending the Paytype.FTE='Yes' to the filter in AQ1.
\Axiom\Reports Library\Productivity Reporting\Biweekly Productivity\Department\Productivity Pay By Employee ID.xlsx	**Issue:** PFB-07231 - Productivity Pay by Employee ID [TFS 32738] **Symptom:** Cell R21 does not return the correct Pay Period Date when prior or future year is selected. **Resolution:** Corrected by updating the formula.

Location	Description
\Axiom\Reports Library\Productivity Utilities\BiWeekly\Report Packages\Biweekly Manager Productivity Package.xlsx	**Issue:** PFB-07244 - Biweekly Manager Productivity Package [TFS 32742] **Symptom:** The prefix for the last two files is incorrect. They currently are ProdID_ and JCProd_. They should be only ID_ and JC_ to match the file names that are produced from the batch. **Resolution:** Corrected by updating multiple formulas.
\Axiom\Reports Library\Budgeting Utilities\Balance Sheet & Deductions\Budget Balance Sheet and Cash Flow.xlsx	**Issue:** PFB-07261 - Budget Balance Sheet and Cash Flow reference ACCT.FPCODE [TFS 32828] **Symptom:** This utility references ACCT.FPCode in the query in both in row 4 and also in the Sum By within the query. This occurred in a 2018.4 system that does not have Financial Planning so the ACCT.FPCode column is not included in the ACCT dimension. **Resolution:** Corrected by updating cells CF and G4 in the Bud_ BalSheet.

System Files

Location	Description
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill02JobCode \Axiom\Reports Library\System Files\VCC Drills\KHA_Drill03Employee	**Issue:** PFB-06576 - URGENT: Issue with Jobcode and Emp Detail Drill Sheets on Dept Variance Report [TFS 24787] **Symptom:** When employing a filter in the GLPayroll Mapping table for the Dept Variance reports that is not the standard Jobcode.GLAcct=xxxx or Paytype.GLAcct=xxxx, issues with the payroll data are encountered, which do not allow you to tie out to the salary GL account **Resolution:** Corrected by updating multiple formulas in the KHA_Drill02JobCode Drill and KHA_Drill03Employee Drill worksheets.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\02_ Summary.xlsx	**Issue:** Month End Review dashboard producing inaccurate data [TFS 31150] **Symptom:** The summary form for the Month End dashboard is producing inaccurate results. **Resolution:** Corrected by adjusting the Variables tab formula calculating the sheet filter to handle various cases based on the selection of or not selecting the refresh variables.

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\VCC.xlsx	**Issue:** PFB-07221 - Month End Dashboard VCC.axj delivered with Dept specific filter [TFS 31687] **Symptom:** The scheduler job was delivered with a filter with KHA department numbers, causing the standard job to error out. **Resolution:** Corrected by updating the Limit Multipass iterations by this filter formula.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\04_ Labor.xlsx	**Issue:** PFB-07260 - Month End Review - YTD toggle showing inflated total FTEs [TFS 32833] **Symptom:** This dashboard displays the wrong Total FTEs when toggling to YTD mode for the Labor form (and likely other Operational embedded forms). **Resolution:** Corrected by updating a formula in the Expense Overview tab to reflect the correct FTE factor.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\05_ Benefits.xlsx	**Issue:** PFB-07285 - Benefit Graph on Operational Review of Month End Dashboard showing wrong data [TFS 33301] **Symptom:** When using the Month End Dashboard report, the graph on the Benefits tab of the Operational Overview area displays salary data - even though the graph is labeled Benefits. **Resolution:** Corrected by updating the query and incorporated the Total line for charts as well as redirected references for the column chart to the Benefits totals.

Issues resolved in 2019.1.1

The following tables list the resolutions for issues addressed in 2019.1.1, released on April 22nd, 2019:

Driver, template, calc method, and other updates

Calc Methods

Location	Description
PFB-07410 - Provider calc method [TFS 34479]	**Symptom:** Save error occurs when adding a new provider. This issue is due to an incorrect cell reference to Variables tab that should reference the Finclass default value but instead referenced a secondary stat default value of typically 'CPT'. **Resolution:** Corrected by updating formulas in the following calc methods: • Add New ProviderDetail • Copy from Existing ProviderDetail • Add New Encounter ProviderDetail Finclass • Add New Procedure ProviderDetail Finclass • Add New Revenue ProviderDetail Finclass • Add New RVU ProviderDetail Finclass • Add New WRVU ProviderDetail Finclass

Templates

Location	Description
PFB-07296 - Employee Tab AQ4 issue [TFS 34238]	**Symptom:** : With the Employee labor method, the historical hours and dollars are not interfacing to the individual employee level detail. Instead the hours and dollars are defaulting to the Float/Inactive row. Issue is due to the batching order of AQ4. **Resolution:** Corrected by modifying the batch that AQ4 is assigned to Control_Sheet V288 from 3 to 4 (Employee column, Batch #).

Report updates

Management Reporting and Utilities

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\06_OtherExpenses.xlsx	**Issue:** PFB-07399 - Month End review 06_OtherExpenses always pulls current year data [TFS 34271] **Symptom:** The Other Expenses tab for this dashboard pulls data for the current system year and not the year selected by the users. **Resolution:** Corrected the CY "Year" formula in the Tables section of the Variables tab to reference the shared variable for Year instead of SystemYear.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\ExpenseOverview.xlsx	**Issue:** PFB-07416 - Expense Overview (managers month End - Executive Overview - KPI variance formatting)[TFS 34492] **Symptom:** On the KPIs, the colors for the variances are reversed. For Salary, the department is over budget, which should display in red because it is bad. The same is the case for Average Hourly Rate and Paid Hours per Unit - over is bad, so it should be red. The Variance Amount should also display as a negative to be consistent with the Variance listed in the Top 10 Unfavorable and the detail in the account detail on the right side of the Visualization. **Resolution:** Corrected by updating the variance calculation, formatting, and indicator direction for expenses to Target-Actuals.

Productivity Reporting and Utilities

Location	Description
\Axiom\Reports Library\Productivity Utilities\BiWeekly\Report Packages\Biweekly Executive Productivity Package.xlsx	**Issue:** PFB-06833 - Incorrect link in Biweekly Executive Productivity Package report [TFS 34418] **Symptom:** In the Biweekly Executive Productivity Package report, on the FileCollect tab, in rows 16 ("Subject Text") and 33 ("Output file name (no extension)"), the formulas include an incorrect link. **Resolution:** Corrected formulas that included references to detached workbook.

Issues resolved in 2019.1.2

The following tables list the resolutions for issues addressed in 2019.1.2, released on May 13th, 2019:

Driver, template, calc method, and other updates

There were no issues addressed in this release.

Report updates

Management Reporting and Utilities

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	**Issue:** PFB-07486 - Month End Review dashboard Sum By should be by acct.rptmap instead of acct.acct [TFS 34910] **Symptom:** The new dashboard sums by Acct.Acct, which is probably fine normally, but for those of us that have made changes in accounting systems and structures recently, I would like to request an enhancement so it will use (or allow us to use) Acct.RptMap. Same thing for the department selection. The system appears to pull the information by Dept.Dept. It would be better to use Dept.RptMap. **Resolution:** Corrected by using acct.rptmap for the dashboard on the Executive Summary, Operation Overview, and VCC tabs.

Productivity Reporting and Utilities

Location	Description
\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Department\Daily Hours by JobClass.xlsx	**Issue:** PFB-07445 - Daily Hours By Jobcode Workload Multipass [TFS 34773] **Symptom:** The system does not feed the current value in the Workload Statistic in cell G31 when multipass is run. Cell G20 looks to G19 for the stat, but the system returns nothing if the user runs multipass. The multipass current value is pulled into G15, but the system is not using it. **Resolution:** Corrected by adjusting the logic for the single department selection from the refresh variables or multipass.

System Files

Location	Description
\Axiom\Reports Library\System Files\VCC Drills\KHA_ Drill02JobCode.xlsx \Axiom\Reports Library\System Files\VCC Drills\KHA_ Drill03Employee.xlsx	**Issue:** PFB-06932 - JobCode and Employee Drills needed an additional filter on ActPay12 hours column [TFS 34774] **Symptom:** The Jobcode and Employee Drills need an additional filter on the ActPay12 Hours column to limit to FTE-related PayTypes. **Resolution:** Corrected by adjusting the column filters for Hours to include concatenated Paytype.FTE='Yes'

Issues resolved in 2019.1.3

The following tables list the resolutions for issues addressed in 2019.1.3, released on June 3rd, 2019:

Driver, template, calc method, and other updates

There were no issues addressed in this release.

Report updates

Management Reporting and Utilities

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	**Issue:** PFB-07544 - Monthly Forecast Utility #NA's in column AA for Inpatient Revenue and Outpatient Revenue with CYFMethod of RemBud [TFS 35507] **Symptom:** When running the Monthly Forecast Utility, the system displays #NA's in column AA for Inpatient Revenue and Outpatient Revenue. The utility does not save because of these errors. A client wants the CYFMethod to be RemBud, but the formula in AA6 has a lookup to CT20:CU22 for only three options: IP_Per_Unit, OP_Per_Unit, and OTH_Per_Unit. If they use a CYFMethod other than those three, the system displays #NA. **Resolution:** The conditional formula in column AA of the AQ2 calc method row requires error handling. The issues was corrected by adjusting the proposed recommendation due to the FALSE cause missing (i.e. if not NA).

System Files

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\ • 03_Revenue.xlsx • 04_Labor.xlsx • 05_Benefits.xlsx • 06_OtherExpenses.xlsx	**Issue:** Month End Dashboard - Benefits tab - Summary row target values do not match KPIs when target is 3 Month Average [TFS 35299] **Symptom:** When a user selects a target of 3 Month Average, the values that display on the % of Salaries, Rate Per FTE, and Benefits Per Unit KPIs are slightly different than the target values that display in the associated summary rows in the Benefits Detail grid. This appears to be the case regardless of whether the user selects Period or YTD. **Resolution:** Corrected the mismatches that occurred with the KPIs target values compared to the target column of the "Detail" statement. After further review, the KPI calculation is preferred, and the statement should reference the same value instead of a separate or different approach to the calculation (i.e. KPI calculates average after each period calculations totals. The statement calculates the total for three periods and then averages).

Manual configuration instructions

A. The Labor Rate Overrides driver now includes the **EPTO% Override** column. This is an optional column that allows you to override the PTO percentage for a specific job code. You can configure this at the global, budget group, department/job code combination level. After the 2019.1 installation, update this column with any overrides you want to use. Otherwise, by default, the system will enter NA. For instructions, see "Budget Labor Override" in the online help.

B. Importing driver data will require you to set up the import. If using any of these new imports, contact Kaufman Hall Client Success so they can help you configure them to your organization's format.

C. Use of Initiatives Profile feature requires set up of the ACCT dimension. For more information, see "Configuring accounts for initiatives" in the online help.

D. As part of the development of future report tools and utilities, data needs to be standardized across accounts, departments, and so on. Part of this process includes mapping these items in your organization to KHA Standard Class codes.

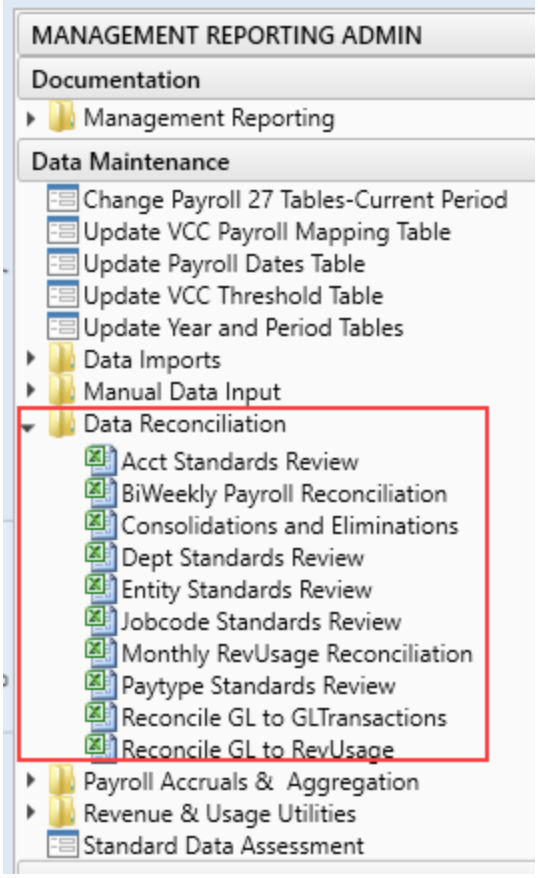
> **NOTE:** This process will benefit your organization in the future by providing more detailed data and reporting capabilities. Once complete, you should only need to update these reports when you add new accounts, departments, etc.

To map KHA Standard Class codes:

a. In the **Mgmt Admin** task pane, in the **Data Maintenance** section, click **Data Reconciliation**, and double click one of the following:

> **NOTE:** The results returned depend on the user's write filter on the dimension table as established when using the Dimension Maintenance Security utility.

- Acct Standards Review
- Dept Standards Review
- Entity Standards Review
- Jodcode Standards Review
- Paytype Standards Review



b. In the **Refresh Variables** dialog, you can optionally filter the data in the report by KHA Standard Class and/or State by clicking **Choose Value**, select the values to filter by, and click **OK**.

> **NOTE:** To view all of the items (accounts, departments, etc.) in the report, click **OK**.

c. In the report, do the following:

> **NOTE:** These following steps depend on the asset opened in Step 1. Other than the KHA Standard Classification column, the fields to update are not the same in each report.

   a. In the **KHA Standard Classification** column, double-click the folder icon next to the field.

   b. From the **Choose Value** dialog, select the codes group together, and click **OK**.

   c. In the **Medicare Provider Number** column, type the MPN number, as needed.

   d. In the **Active** column, identify which entity is active by doing one of the following:

      - To activate the code, click TRUE.

- To deactivate the code, click FALSE.

d. After making your changes, in the **Main** ribbon tab, click **Save**.

The information you enter saves back to the corresponding dimension table. For example, after mapping your accounts, the system saves your changes to the ACCT dimension table.

Known issues

The following table lists the known issues in this release:

Plan File

Issue	Description
Plan File: Budgeting Guide [TFS 10427]	**Symptom:** When using Windows client and more than one plan file is open, the Budgeting Guide will only display on the first plan file tab opened. As a work-around, click back to the first plan file opened and the Budgeting Guide should be visible. **Explanation:** This will be fixed in a future release.
Expense tab|Drill to detail [TFS 24968]	**Symptom:** When using Windows client and drilling from Expense tab to GL Detail, the column will not contain column filters. **Explanation:** This will be fixed in a future release.
Expense tab|Drill to detail [TFS 30235]	**Symptom:** When drilling from Expense tab to GL Detail, the description may not be correct when using KHABgtMap. **Explanation:** This will be fixed in a future release.
Jobcode tab [TFS 26060]	**Symptom:** When using Jobcode method and inserting Add New Jobcode, the job code is tagged as “Fixed” instead of looking to the Jobcode dimension to determine if Fixed or Variable. This could impact use of target setting feature. **Explanation:** This will be fixed in a future release.
CDM tab [TFS 25476]	**Symptom:** Output from printing is missing the Non-Key section. **Explanation:** This will be fixed in a future release.

Reports

Issue	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Variance Alert.xlsx	**Issue:** Variance Alert - Summary account data is not populating [TFS 33578] **Symptom:** When using the Variance Alert report, data does not appear to be populating for summary accounts. **Explanation:** This will fixed in a future release. This behavior works correctly in the VarAlert tab of the Dept Monthly Package \Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx.
\Axiom\Reports Library\System Files\Forms\Management Reporting\ISTemplateViewer.xlsx	**Issue** Income Statement Template Viewer: Extraordinary Item (FSDetail=R_NonOpExtraord) is included in Total Non-Operating Revenue [TFS 32696] **Symptom** – Depending on the sign of the accounts coded to Acct.FSDetail=R_NonOpExtraord, you may be overstating the Total Non-Opearting Revenue. **Explanation:** We are reviewing the impact of this, and we may update in a future release.
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Review\Variance Review.xlsx	**Issue:** PFB-07037 - Additional records are being displayed even with the AlertFlag = 1 [TFS 30026] **Symptom:** Where the alert flag has been saved in prior years the accounts will populate for those as well. **Explanation:** Working to update this report in a future release.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\01_ Navigation.xlsx	**Issue:** Month End Review Dashboard does not snapshot when option selected **Symptom:** When selecting to generate PDF option, only the visible window generates the PDF and not entire dashboard (all tabs). **Explanation:** This will be a platform update in a future release.

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2019.1 Release Notes** for additional known issues that have a suite-wide impact.