



Release Notes  
Axiom Budgeting and  
Performance Reporting  
Version 2019.3



KaufmanHall

AXIOM

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# Summary

**NOTE:** For the most updated versions of these release notes, we recommend that you view/download them from the Axiom Budgeting and Performance Reporting online help. You can access the help from the **Help** ribbon tab by clicking **Online Help > Budgeting and Performance Reporting > Release Notes**.

Kaufman Hall is pleased to announce the 2019.3 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](mailto:support@kaufmanhall.com) or your implementation consultant, and they will confirm an installation period with you.
3. **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 and/or considerations to be aware of before or after installation. For more information, see [Manual configuration instructions and technical considerations](#).

## 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](mailto: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](http://www.kaufmanhall.com).

# Product upgrade notes

**IMPORTANT:** You must apply the Axiom Software 2019.3 upgrade before applying any 2019.3 Axiom product upgrades. Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2019.3 *before* the first product upgrade. Refer to the **Axiom Software 2019.3 Release Notes** and **Axiom Healthcare Suite 2019.3 Release Notes** for considerations before upgrading. 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

The 2019.3 release focused on mandates that included improved performance of the plan file open and save times and enhancements to the overall user experience. We set out to accomplish this in a manner that met the following objectives:

- 1 Retain the strength of our template today
- 2 Consider ease of adoption & roll-out, limit re-training
- 3 Improve usability, performance for End User (open & save times)
- 4 Improve on-going support of model, easily patch defects

Improvements were made to the user experience by designing a new side navigation menu and an updated color palate that helps to focus a user's attention.

## NEW BUDGET PLAN FILE

### BUDGET

Is the main model – and the only model - the majority of our Budget Users will need interact with.

### PROVIDER

Is now a separate file, opened in the Navigation Tab. This will be a new experience for the End Users.

### OTHER FILES

New Initiatives, Operating Plan and History also open as separate files.

	FY17 Actual	FY18 Actual	FY19 Budget	FY19 Projected	FY20 Budget	Proj Bud Variance Amt	Proj Bud Variance %	New Initiatives	Final Budget	Proj Variance Amt
<b>Summary</b>										
101010 - EMA Internal Medicine (Provider Detail)										
Deductions from Revenue	11,118,501	11,915,178	13,358,138	5,932,383	0	5,932,383	100.0%	0	0	5.1
Net Patient Revenue	(11,118,501)	(11,915,178)	(13,358,138)	(5,932,383)	0	5,932,383	(100.0%)	0	0	5.1
Other Revenue	6,117,075	6,655,710	5,852,161	4,769,379	4,769,379	0	0.0%	0	4,769,379	0
<b>Total Revenue</b>	<b>(5,001,426)</b>	<b>(5,259,468)</b>	<b>(7,505,977)</b>	<b>(1,163,004)</b>	<b>4,769,379</b>	<b>5,932,383</b>	<b>(510.1%)</b>	<b>0</b>	<b>4,769,379</b>	<b>5.0</b>
Salaries	4,365,258	3,434,667	4,041,606	4,222,041	5,013,131	(791,090)	(18.7%)	0	5,013,131	(7.1)
Employee Benefits	1,656,395	1,646,199	2,363,184	1,403,475	1,169,910	233,565	16.6%	0	1,169,910	(2.1)
Contract Labor	22,714	37,164	0	36,602	0	36,602	100.0%	0	0	2.1
Physician Salaries	2,823,571	4,120,657	4,871,079	2,140,675	0	2,140,675	100.0%	0	0	2.1
Employee Benefits - Physician	255,814	373,330	199,010	0	0	0	0.0%	0	0	0
Salaries - MidLevel	564,743	824,174	974,245	423,749	0	423,749	100.0%	0	0	4.1
Employee Benefits - MidLevel	92,143	134,471	71,681	14,703	58,952	(44,249)	(301.0%)	0	58,952	(5.8)
Professional Fees	10,404	0	0	2,959	2,959	0	0.0%	0	2,959	0.0
Supplies	119,807	104,542	114,365	82,275	89,515	(7,242)	(8.8%)	0	89,515	(8.5)
Drugs and Pharmaceuticals	486,187	488,904	591,513	285,633	336,724	(51,090)	(17.9%)	0	336,724	(3.3)
Purchased Services	0	29	26	33	33	0	0.0%	0	33	0.0
Depreciation	18,498	25,138	20,173	18,892	19,440	(548)	(2.9%)	0	19,440	(0.5)
Other Expense	2,072,479	2,677,772	1,420,353	2,493,294	2,541,513	(48,219)	(1.9%)	0	2,541,513	(1.9)
<b>Total Expenses</b>	<b>12,488,134</b>	<b>13,877,947</b>	<b>14,667,237</b>	<b>11,124,328</b>	<b>9,232,176</b>	<b>1,892,153</b>	<b>17.0%</b>	<b>0</b>	<b>9,232,176</b>	<b>1.8</b>
<b>Contribution Margin</b>	<b>(17,489,560)</b>	<b>(19,136,515)</b>	<b>(22,173,214)</b>	<b>(12,287,332)</b>	<b>(4,462,797)</b>	<b>7,824,535</b>		<b>0</b>	<b>(4,462,797)</b>	<b>7.8</b>
<b>Statistical Analysis</b>										
Other Key Statistic	0	19,204	40,388	44,745	47,897	2,352	5.3%	0	47,897	0.0
<b>Total Key Statistic</b>	<b>0</b>	<b>59,284</b>	<b>60,388</b>	<b>44,745</b>	<b>47,897</b>	<b>2,352</b>	<b>5.3%</b>	<b>0</b>	<b>47,897</b>	<b>0.0</b>
Revenue / Unit	0.000	(88.836)	(124.296)	(25.952)	101.287	127.259	(489.6%)	0.000	101.287	0.0
Salaries / Unit	0.000	142.164	163.723	152.488	106.443	46.045	30.2%	0.000	106.443	0.0
Benefits / Unit	0.000	36.383	43.616	31.695	26.992	5.603	17.7%	0.000	26.992	0.0
Supplies / Unit	0.000	10.193	11.689	8.232	9.050	(0.838)	(10.1%)	0.000	9.050	0.0
Other Expense / Unit	0.000	45.655	23.855	56.211	54.440	1.772	3.2%	0.000	54.440	0.0

We continued a theme from 2019.2 where we introduced the “click-to-expand” feature in the Provider Detail tab and expanded its use to the labor methods. The “click-to-expand” feature summarizes what would normally be a busy looking tab and reduces the initial view to summarized rows. The user then has more control over their plan file session by selecting what and when they see detailed content.

## JobCode

27200 - EMC Radiology - MRI (JobCode)

FTEs From Target	11.29	11.25	2.67
PAID Hrs/Unit	0.627	0.628	1.411

Job Code		Current Rate	Start Rate	End Rate	Alloc Rate	FTEs - Projected Using Actual			Dollars			Notes
						FY 2020 Budget	YTD Actual	Mar-Jun Projected	FY 2021 Budget	Mar-Jun Projected	FY 2021 Budget	
J00200	Technologist Assistant-Ro											
	Assistant											
	Variable											
	Total Productive					0.00	0.42	0.42	0.42	2,220	6,687	
	Total Non-Productive					0.00	0.03	0.03	0.03	136	409	
	JobCode Total					0.00	0.45	0.45	0.45	2,356	7,096	
	<a href="#">Double click to show details</a>											
J00287	Team Leader-MRI											
	Technical											
	Fixed											
	Total Productive					0.00	0.93	0.93	0.93	18,381	56,771	
	Total Non-Productive					0.00	0.15	0.15	0.15	4,785	14,338	
	JobCode Total					0.00	1.09	1.09	1.09	23,165	71,109	
	<a href="#">Double click to show details</a>											
J00646	Radiologic Technologist											
	Technical											
	Variable											
	Total Productive					0.00	5.24	5.23	14.43	97,112	817,166	
	Total Non-Productive					0.00	0.63	0.63	1.74	14,811	124,741	
	JobCode Total					0.00	5.87	5.86	16.17	111,923	941,906	
	<a href="#">Double click to show details</a>											
	<a href="#">Double Click to Insert New Job Code</a>											

Performance gains were accomplished thru a multi-faceted approach that included optimizing the entire template for formula improvements, moving some template components to optionally selected tabs, and development of platform capabilities to process open and save times significantly faster. If you are currently on a version of Axiom Budgeting and Reporting that is several versions older than 2019.3, you will likely see a significant change in your user experience.

One of the highlights for the Axiom team in this release was the defined approach to include several Axiom budget planning clients join us through the development cycles. Several design sessions were held to showcase our progress along the way and offer invaluable feedback. This experience was enjoyed by all and will be an important ongoing improvement to our design model. Much of what you will see in this release is a direct contribution from your peer's feedback and influence.

As previously noted, it was Axiom's intent to minimize the burden of retraining users so we have kept the changes to a minimum for most users. The operation of the plan file is intended to be very familiar. We do have videos to support and assist with common plan file operations and we encourage administrators to direct users to the video content. You can find these videos on the Videos page of the Axiom Budgeting and Performance Reporting online help.

**IMPORTANT:** The enhancements referenced above apply to the plan file template included in the 2019.3 Prototype file group. These enhancements only apply to the Windows Client, not the Excel Client. This means that if you implement the 2019.3 Prototype file group, you can continue to create and process plan files in the Excel client, but *you cannot open plan files in the Excel Client*. All plan file related work must be done using the Windows Client, but any other activities can be done in Excel, as needed.

## Budget Labor Configuration driver

As the focus of this release was to improve performance, we minimized adding new features except for one important update was made to the Budget Labor Configuration driver. To improve the administrator's ease of use when adding new budget groups to this driver, we added logic to start out the insertion of a new budget group with all the values from the Global group. This means essentially no inputs are needed to the new budget group unless changes from the global values are desired.

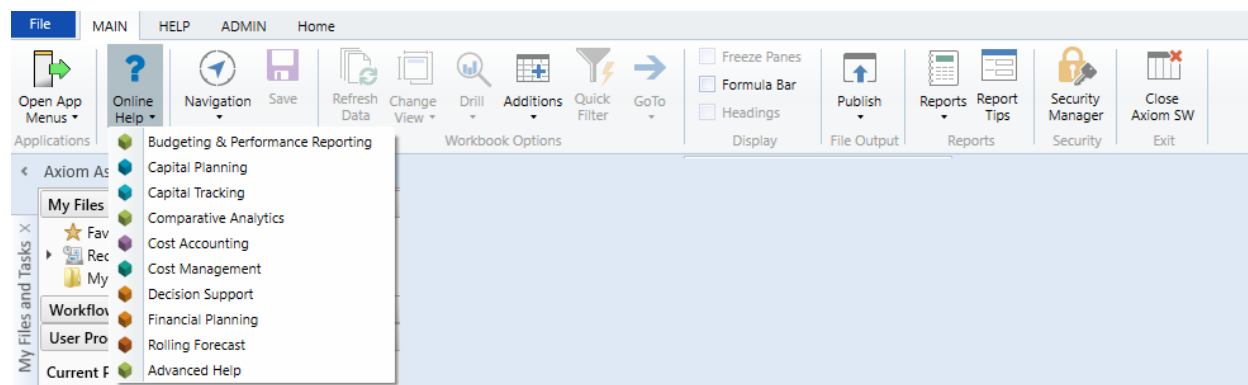
We also added "click-to-insert" controls for key dimension-related values such as selecting pay types, job codes, and accounts. This helps reduce the risk of unintentional input errors that can cause plan file issues when processing.

**Budget Workbook Labor Configuration Settings**

Global Setup	Two Years Ago	Last Year	Current Bud	YTD	ProjCalc	ProjAdj	ProjTtl	BudTtl	BudPrelim	Bud_Targ
<b>Save</b> Medical Center	EMC									
EMC Hours per FTE Convention	Default	2088								
EMC Calendar Days	365	365	366	244	122		366	365		
EMC Work Days in Period	261	261	260	173	87		260	277		
EMC Hours in Period	2,080	2,080	2,088	1,392	696		2,088	2,086	2,086	
EMC Number of Holidays				4	2		6	6		
<b>Labor Configuration</b>	Denotes use of Global default									
% of Staffing Change with Volume								60.0%		
Medicare Tax							1.45%	1.45%		
Current FICA Rate							6.20%	6.20%		
Current FICA Limit							\$110,100	\$113,700		
Retirement Below FICA limit							0.00%	0.00%		
Retirement Above FICA limit							0.00%	0.00%		
Retirement Max Limit							\$0	\$0		
Uniform Merit Increase Date?						No		09/04/20		
FTE Comparison to YTD						CYB_FTE		80.00	Default for Scheduled FTEs	
Projected FTE Starting Point						YTD_FTE				
Forecast FTEs from Projection								Yes		
Hours per PayPeriod								80.00		
Hours per Monthly								173.8095		
KHASum Code for Agency						PaidHoursContract		SalariesContract		
KHASum Code for Physician						PaidHoursPhy		SalariesPhy		
Use Self-Balancing to Target on Jobcode tab?				No		Variable-Productive		Fixed		
Jobcode to use for Self-Balancing Jobcode Adjustment					Jobcode >>	JTargetAdj		JTargetAdj	<< Jobcode	
Paytype to use for Self-Balancing Jobcode Adjustment					Paytype >>	P0001		P0001	<< Paytype	

## Improved navigation to online help

The Main, Admin, and Help ribbon tabs now include a single listing of the online help sites for each product, including access to Axiom platform help from the Advanced Help link.





**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 from the 2019.3 release. For instructions, see "Rolling forward to a new budget year" in the Axiom Budgeting and Performance Reporting online help.

# Issues resolved in 2019.3

The following tables list the resolutions for issues addressed in 2019.3, released on September 16th, 2019:

## Driver, template, calc method, and other updates

### Calc Methods

Issue	Description
PFB-06865 - JobCodeADC Negative Prod FTEs [TFS 29791 and 30881]	<p><b>Symptom:</b> The job code will not zero out when trying to edit values in the Productive and Non Productive categories.</p> <p><b>Resolution:</b> Corrected by updating formulas in the Jobcode calc method when using ADC to fully zero a value if needed.</p>
PFB-07212 - BP Staffing Tab NYB FTE error when adding New Jobcode [TFS 31584]	<p><b>Symptom:</b> In the Add New Jobcode calc method, there appears to be an error in calculating the NYB FTE. The current calculation assumes a full year FTE of the hours assigned in the staffing grid. With this calc method, you can define the start and end months of the new position, so it is not necessarily a full year position.</p> <p><b>Resolution:</b> Corrected by updating the formula in column Q rows 11-16 and 19-23 of the Add New Jobcode calc method to accommodate a partial year FTE.</p>
PFB-07390 - Provider Detail Calc Method is not DataType.BudgetType compliant [TFS 36441]	<p><b>Symptom:</b> During a provider set up, an issue was discovered in the AQ within the provider detail methodology. Within AQ8, some of the groupings were by DataType and others by DataType.BudgetType. This becomes an issue when a user maps their data types to the specific groupings.</p> <p><b>Resolution:</b> Corrected by updating the use of the provider primary stat and secondary stat to use DataType.BudgetType.</p>

Issue	Description
<p>PFB-07431 - Calc methods on Provider tab create #REF beyond ~4500 rows - update in V5 [TFS 36442]</p>	<p><b>Symptom:</b> Many single row calc methods (listed below) on the Provider tab have formulas that include an INDEX() function with range that is "locked" at a row in the 4500 to 4600 range. When adding providers below this row range, the formulas fail with a #REF error.</p> <ul style="list-style-type: none"> <li>• Add New FinancialClass</li> <li>• Add New Revenue</li> <li>• Add New Revenue ProviderDetail FinClass</li> <li>• Add New Revenue ProviderDetail Location</li> <li>• Add New RVU</li> <li>• Add New RVU ProviderDetail FinClass</li> <li>• Add New RVU ProviderDetail Location</li> <li>• Add New WRVU</li> <li>• Add New WRVU ProviderDetail FinClass</li> <li>• Add New WRVU ProviderDetail Location</li> </ul> <p><b>Resolution:</b> Corrected by reviewing all instances of Indirect, Index, and Match formulas to update the ranges.</p>
<p>PFB-07513 - Provider Detail GLAcct Reference to Variables tab is incorrect [TFS 35091]</p>	<p><b>Symptom:</b> Column AU of the single line interfaced and inserted calc methods reference incorrect cells on the Variables tab due to moving a row Variables tab.</p> <p><b>Resolution:</b> Corrected by updating the calc method to the correct variable reference.</p>
<p>PFB-07557 - Incorrect save logic for initiatives being zeroed out [TFS 35866]</p>	<p><b>Symptom:</b> When using the Initiative tab in the Budget workbook, the save logic for Bud20XX in column AN and Bud20XX-Detail in Column AO, the system:</p> <ul style="list-style-type: none"> <li>• Does not allow for saving of zeroed out initiatives in either table for initiatives that were previously non-zero.</li> <li>• Does not zero out a non-zero initiative from the Bud2020 table if it is Excluded.</li> </ul> <p><b>Resolution:</b> Corrected by updating the Save to Database logic setup.</p>

Issue	Description
PFB-07597 - Projected salary under "Salary" PComp method is incorrect [TFS 35863]	<p><b>Symptom:</b> When using "Salary" as the primary ProviderComp model, it appears that the Projected Compensation for the current year is either over or understated pending on how much of an FTE is involved as the YTD portion of the calculation does not take this into account.</p> <p><b>Resolution:</b> Corrected by updating how the YTD value is calculated to match the same logic use in Remaining Projection.</p>
PFB-07696 - RecordID formula in Add Detail calc methods for Expense cause save errors [TFS 37140]	<p><b>Symptom:</b> When adding Add Detail - Input Monthly or Add Detail - Input Total rows into a detail calc method block, a duplicate keys error message displays when saving the plan file.</p> <p><b>Resolution:</b> Corrected by updating the RECORDID column to increment by a factor of 1. This was essentially an issue if the detail records were zero and that records was saved back to the Detail database.</p>
PFB-07697 - Summary Tab Hide Row Logic Error for hours section is incorrect [TFS 37147]	<p><b>Symptom:</b> In the Budget Master Template on the Summary worksheet, the hide row formula in the cells F64, F66-F79, F81-F83 should only look at the specified row to determine if it should be hidden from view.</p> <p><b>Resolution:</b> Corrected by updating the cell formulas accordingly.</p>
PFB-07726 - Duplicate job codes on Staffing tab when KHABGTmapping departments [TFS 36946]	<p><b>Symptom:</b> When using the Staffing tab and using a KHABGTMapped department, duplicate job codes resulted because of a bad sectional filter for AQ4.</p> <p><b>Resolution:</b> Corrected by updating the sectional filter in AQ4 to use Dept.KGABgtMap v.KHABgtCode.</p>
PFB-07795 - Bad formula in Add New Encounter ProviderDetail FinClass calc method [TFS 38914]	<p><b>Symptom:</b> The system displays a cell formula error in PROVIDER tab during the recalculation due to the Add New Encounter ProviderDetail FinClass calc method.</p> <p><b>Resolution:</b> Corrected by updating formulas in column BD of the ProviderDetail sheet to contain the updated match logic.</p>

## Drivers

Issue	Description
PFB-07677 - File Group Creation Process for Budgeting Errs with Global Data Drivers [TFS 37136]	<p><b>Symptom:</b> In 2019.1, we changed how the Budgeting File Group creation process works with the introduction of the Rollover File Group process on the Bud Admin task pane. When the process runs, it can err on the Global Data drivers.</p> <p><b>Resolution:</b> Corrected by reordering the drivers so that the Expense Admin Adjustment Setup driver runs before the Expense Admin Adjustment (which has a dependency on the Setup driver)y.</p>

## File groups

Issue	Description
PFB-07679 - File Group Process errs out due to incorrect order of Admin Adjustment Drivers [TFS 37137]	<p><b>Symptom:</b> In 2019.1, we changed how the Budgeting File Group creation process works with the introduction of the "Rollover File Group" process on the Bud Admin task pane. When the process is running, it can err on the Expense Admin Adjustment Drivers (18 and 19).</p> <p><b>Resolution:</b> Corrected by updating the GetFileGroupVariable() function on the Variables sheet to resolve correctly.</p>

## Tables

Issue	Description
PFB-07589 - GlobalData4 table contains an extra column "Description" [TFS 36270]	<p><b>Symptom:</b> When running the rollover command adapter, an error occurred that led to reviewing the GlobalData4 table. We found that data for the GlobalDataFilter record was not in the correct columns (string vs. numeric) and that the GlobalData4 table contains a second column named Description, which does not exist in the other GlobalData tables (GlobalData, GlobalData2, GlobalData3). This caused the data to be misaligned in the columns.</p> <p><b>Resolution:</b> Corrected by removing the Description field.</p>

## Templates

Issue	Description
PFB-06587 - When drilling to JE and AP/MM/AR transaction detail from the Expense tab of the Budget Plan File, filtering is turned on but does not work [TFS 24968]	<p><b>Symptom:</b> When in the Windows Client and drilling to JE and AP/MM/AR transaction detail from the Expense tab of the Budget Plan File filtering is turned on but not working. The filter area is not set properly.</p> <p><b>Resolution:</b> Corrected by updating cell formulas in KHA_Drill09JE and KHA_Drill03Transaction.</p>
PFB-07626 - Incorrect formula on Jobcode tab for Target setting rows for GLAcct [TFS 35994]	<p><b>Symptom:</b> When using the target setting rows, the GLAcct lookup in column CK contains an error in the formula causing the GL Acct not to populate.</p> <p><b>Resolution:</b> Corrected formulas in column CK of the JTargetAdj lines.</p>
PFB-07635 - Stat_rev tab (2019.2) Variable_Stat calc method can produce DIV/0 errors [TFS 36853]	<p><b>Symptom:</b> The Variable_Stat calc method on the Expense sheet does not account for scenarios where the associated Stat_Rev row has 0 value, resulting in #DIV/0 errors.</p> <p><b>Resolution:</b> Corrected by adding additional formulas to test for zero values.</p>
PFB-07652 - Employee: Add New Employee CM missing check for std 2080 hours in formula [TFS 36751]	<p><b>Symptom:</b> When using the Employee tab and adding a new employee row calc method in the existing job code block, the formula in month 2 through 12 of the Hours fields are missing the check to see if the job code is flagged as 2080 hours (comes from Jobcode table).</p> <p><b>Resolution:</b> Corrected by copying to formula from column AG and copying to column AR.</p>
PFB-07688 - Defect in JTarget Adjust line of Jobcode tab [TFS 37129 and 37139]	<p><b>Symptom:</b> In column CK of the JTargetAdj lines, the current formula does not properly look up mappings in the Jobcode.GLAcct column.</p> <p><b>Resolution:</b> Corrected by updating the Jobcode tab, column DD.</p>
PFB-07722 - Cell P48 formula is incorrect in Initiates tab in Master template [TFS 36844]	<p><b>Symptom:</b> Cell P48 on the Initiates tab should include the formula: =Expense!A168. Instead, it contains =Expense!A151. The issue was that the tenth month FTE factor resulted in zero.</p> <p><b>Resolution:</b> Corrected by adding the formula in cell P48.</p>

Issue	Description
PFB-07791 - Field Fix: Staffing Tab HRAcct [TFS 37149]	<p><b>Symptom:</b> The formula to lookup the Hours GLCode in the Staffing tab is not consistent with other labor methods. If using the JOBCODE dimension for the Expense GLCode and PAYTYPE dimension for the Hours GLCode, the Hours GLCode resolves to zero (0). This is inconsistent with results for our other labor methodologies.</p> <p><b>Resolution:</b> Corrected by updating the JobCode and Add New JobCode calc methods for column CL.</p>
PFB-07808 - CP to BP Integration - Capital Planning (Web) Issue [TFS 37624]	<p><b>Symptoms:</b> There were items not interfacing into the Budget plan file even though there were records in the CPToBP_2020 table.</p> <p><b>Resolution:</b> There was an issue with an AQ recognizing if Capital or Capital (Web) version was used. This had been corrected for either license type.</p>
PFB-07902 - Incorrect Total formula for Evening Shift in JC block on Staffing tab [TFS 38184]	<p><b>Symptom:</b> When using either the Jobcode or New Jobcode blocks on the Staffing tab, the Weekly Hour total for the Evening shift does not change accordingly if a 12-hour shift is used.</p> <p><b>Resolution:</b> Corrected the formula on the Staffing tab.</p>
PFB-07883 - Approved initiatives w/ salaries and hours show "Do Not Match" error on the Expense tab [TFS 37909]	<p><b>Symptom:</b> When working with the Initiative tab, if you approve an initiative, the dollars and hours flow into the Labor tab as expected, but this triggers the "Salaries Do Not Match" and "Hours Do Not Match" messages on the Expense tab since these amounts do not flow there (which is correct by design). The formula logic needs to be updated on the Expense tab so that these messages are not incorrectly triggered by the approved initiative amounts on the Labor tab.</p> <p><b>Resolution:</b> Corrected by updating formulas in cells in the JobCode tab</p>
PFB-07912 - Global Drivers on Stat_Rev not updating for changes in Driver [TFS 38161]	<p><b>Symptom:</b> When configuring the 04 Budget Driver and updating values in the IP, OP and Other columns, the updates are not reflected on the Stat_Rev tab of the plan file in the Global Drivers section.</p> <p><b>Resolution:</b> Correcting by removing the time stamp on the AQ and inserted blank rows in between the IP, OP, Other driver rows.</p>

Issue	Description
PFB-07932 - Jobcode tab no longer recognizes use of Projected FTE Starting Point Configuration [TFS 38185]	<p><b>Symptom:</b> Due to a change in a formula to "optimize", the change removed the part of the formula that tested to see what Projected FTE Starting Point to use. This now defaults to only one option.</p> <p><b>Resolution:</b> Corrected by updating the formula in column M of the Jobcode calc method to look at the correct cell to use YTD or Budget as starting point.</p>

## Workbooks

Issue	Description
PFB-05506 - GLClass JobClass not populating on ProviderComp if no Actuals [TFS 12507]	<p><b>Symptom:</b> When interfacing plan files, the ProviderComp tab does not find GLAcct and HRAcct when using PayrollGLMapping. This problem presented to selected job codes while other job codes on this tab worked correctly (finding the GLAcct and HRAcct from the PayrollGLMapping table). This issue would occur when there was current year budget but no associated actuals.</p> <p><b>Resolution:</b> Corrected by bringing in the PayrollGLMapping table into the of Provider as part of setting up the provider tabs.</p>
PFB-06579 - Incorrect Initiative ID used when accounts interfaced into Exp and StatRev tabs [TFS 25044]	<p><b>Symptom:</b> When moving to the next budget year (ex. 2018 to 2019), if two records for the same account but different initiative IDs are brought in on the Stat Rev or Expense tabs, the records are summarized correctly, but the system uses the highest initiative ID number. This is problematic if that same ID is used on the Initiative ID tab as the Expense and Stat Rev tabs are saved after the Initiative sheet. This means the system overwrites the values from that tab in Bud20xx table.</p> <p><b>Resolution:</b> Corrected by updating the data filter in the queries in the Stat_Rev and Expense tabs to filter only for InitiativeID=1.</p>



# Report updates

## Budgeting Utilities

Location	Description
\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Budget Department Audit Report.xlsx	<p><b>Issue:</b> PFB-06608 - Budget Dept Audit Report does not flag all issues [TFS 25198]</p> <p><b>Symptom:</b> The Hide Row logic does not look for issues flagged in all needed columns (i.e. Owner, Review, Approver). Currently, the Hide Row logic only looks for issues in columns T and U for BudgetGroup and Template warnings.</p> <p><b>Resolution:</b> Corrected by updating the formula in cell D4 to include all needed columns.</p>

## Income Statement Builder

Issue	Description
PFB-07728 - Custom Income Statement column string length cannot exceed 25 when using the Income Statement Builder [TFS 36855]	<p><b>Symptom:</b> While using the Income Statement Builder, the income statement categories are limited to a string length of 25. You can create the custom column in the ACCT dimension table and define the string length to be greater than 25, however, while in the template / builder, if you try to save the income statement categories in step 3 of the builder, the system displays an error that the string length cannot exceed 25.</p> <p><b>Resolution:</b> Corrected by increasing the max string length for the "Code" column.</p>

## System Files

Location	Description
\Axiom\Reports Library\System Files\Home Files\Productivity- BiWeekly- SingleDept.xlsx	<p><b>Issue:</b> PFB-07891 - Urgent - Productivity Biweekly Dashboard includes Non Prod hours in WHPUOS calc [TFS 37934]</p> <p><b>Symptom:</b> The Productivity Dashboard produces different results for WHPUOS than the VCC or standard packages.</p> <p><b>Resolution:</b> Corrected by updating the filter used in the AQ.</p>

# Manual configuration instructions and technical considerations

Review the following manual configuration instructions and/or technical considerations before beginning the implementation process for Axiom Budgeting and Performance Reporting 2019.3.

## ► Create new copies of Build & Process and Recalc Scheduler jobs

**Issue:** Significant changes were made to both the Build & Process and Recalc Scheduler jobs that will require administrators to use the new versions.

**Instructions:** If your organization uses copies of these jobs as Saved As, then you will need to create new copied versions from the new standard versions.

## ► Error message now displays when inserting a JobCode block within another JobCode block

**Issue:** In previous versions, driver and dimension setup created situations where the labor Aqs would insert the large JobCode block within the middle of another JobCode block. In 2019.3, the system will now display an error message when processing plan files. The following is an example error message that occurs when a plan file includes the JobCode labor method:

Task: Budget-2020_3005653000.xlsx	Started: 9/15/2019 05:51	Duration: 00:00:47	Result: Success
Task: Budget-2020_3045647000.xlsx	Started: 9/15/2019 05:51	Duration: 00:00:09	Result: Failed
Axiom Query '[aq10]' failed for sheet 'Jobcode'			
Calc method 'JobCode' does not exist in Calc Method Library.			
9/15/2019 05:52 12:51:57 3045647000 Success Processed 4 Axiom Queries for Document: "Budget-2020_3045647000.xlsx" Worksheet: "Variables"			
12:51:57 3045647000 Success Processed 11 Axiom Queries for Document: "Budget-2020_3045647000.xlsx" Worksheet: "Drivers"			
12:51:59 3045647000 Success Processed 3 Axiom Queries for Document: "Budget-2020_3045647000.xlsx" Worksheet: "Configuration"			
12:52:01 3045647000 Success Processed 5 Axiom Queries for Document: "Budget-2020_3045647000.xlsx" Worksheet: "Stat_Rev"			
12:52:02 3045647000 Success Processed 4 Axiom Queries for Document: "Budget-2020_3045647000.xlsx" Worksheet: "Empl_List"			
12:52:05 3045647000 Error Axiom Query '[aq10]' failed for sheet 'Jobcode' Calc method 'JobCode' does not exist in Calc Method Library.			
12:52:05 3045647000 Error Error refreshing Axiom Query 'AQ10: Actual Dollars' on sheet 'Jobcode'. Calc method 'JobCode' does not exist in Calc Method Library.			

This occurs in any labor sheet - JobCode, Employee, or Staffing.

**Instructions:** If your organization uses paytype.fte = No, then in the paytype.KHAStdline or any other custom Stdline columns, jobcode is no longer a valid entry. You need to select another valid entry.

## ► Invalid ACCTs

**Issue:** Prior to 2019.3, the GL accounts and HR accounts were not being validated against the ACCT dimension. In 2019.3, if your ACCT assignments from the PayrollGLMapping driver, Paytype.Acct, and JobCode.Acct are not using actual ACCTs, you will encounter an error when processing plan files.

**Instructions:** Before building plan files, you need to ensure that the jobcode.glacct and jobcode.hracct include valid account entries that exist in the ACCT dimension. The same goes for paytype.glacct and paytype.hracct. If your organization uses the Payroll GL Mapping table, make sure that the valid account entries are included there as well.

▶ Duplicate job codes in labor sheets

With the redesign template, you can no longer use duplicate job codes on the labor tab because we now allow you to change the rate for new FTEs in the redesigned JobCode block. In other words, If your plan file built with example Jobcode J100 as part of the original build, you can no longer insert the same Jobcode J100 a second time (assuming the same department number). If a second occurrence is inserted, a duplicate error will result.

# Known issues

The following table lists the known issues in this release:

**IMPORTANT:** Refer to the **Axiom Software 2019.3 Release Notes** and the **Axiom for Healthcare Suite 2019.3 Release Notes** for additional known issues that have a suite-wide impact.

## Driver, template, calc method, and other non-report items

### Calc Methods

Issue	Description
PFB-07566 - NoBudget calc method does not recognize CYPMethod [TFS 36850]	<p><b>Issue:</b> In the Expense tab, the NoBudget calc method does not recognize CYPMethod.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-07750 - Stat Rev tab does not save rows with zeroes [TFS 37362]	<p><b>Issue:</b> If a row contains all zeroes (i.e. a user wants to zero out a row on the Stat Rev tab), the zeroes do not save because the save tag is now turned off.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-07837 - CP to BP Integration - FTE issue [TFS 37656]	<p><b>Issue:</b> When transferring FTEs from capital planning to budget planning, this utility needs to convert the FTEs to hours to be consistent with the BP methodologies of storing hours not FTEs.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-05951 - Changing an SPM defaults the department to KHABGTCode instead of retaining KHABGTMAP [TFS 37970]	<p><b>Issue:</b> When changing the calc method for an account within a budget workbook, the DEPT column defaults to the workbook number instead of the original department number that existed on that row.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-07894 - CapBud method calc inconsistent for accounts where YTD exceeds the CYB [TFS 38076]	<p><b>Issue:</b> When using the capbud CYPMethod, those accounts where the YTD number exceeds the Current Year budget, the system appropriately projects a 0 for the rest of the year for all budget methodologies except for the Detail accounts. For Detail accounts, the rest of the year projection is annualized instead of projecting the rest of the year at 0.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

Issue	Description
PFB-07910 - Apply inflation to detail accounts set to 'No' is still being applied [TFS 38187]	<p><b>Issue:</b> Within the Budget Revenue Adjustment driver (39), there is an option to select Apply Inflation to Detail Accounts (Yes/No). When the user selects No, the system continues to apply inflation to the detail accounts on the Stat_Rev sheet of the plan file.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-08001 - GlobalProviderComp row includes hardcoded zero in budget total column [TFS 38661]	<p><b>Issue:</b> When using the GlobalProviderComp option for new providers on the ProviderComp tab, column P (total budget dollars) incorrectly includes a hardcoded zero instead of the proper reference to BF for the current row.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Drivers

Issue	Description
PFB-06218 - Budget admin expense adjustments issue with percentages [TFS 20767]	<p><b>Issue:</b> When inputting a percentage in the Admin Expense Adjustment driver, the note states "10=10%", but when looking at the plan file after making the adjustment, it appears that 10=1000%.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-06968 - Job class character width - labor rates not compliant [TFS 29371]	<p><b>Issue:</b> In the Labor Rates driver, the Job Class Exceptions is not compliant with the Jobcode.JobClass character width of 50. In the 2019 Labor Rates Assumptions table, column O is set for a 25-character width, thus not saving if the Job Class selected within the drop-down is more than 25 characters. As a result, the system displays an error message, and the driver will not save.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-06816 - YTD column in the Stat and Stat Supplement drivers are not Budget Group compliant [TFS 29946]	<p><b>Issue:</b> For budget groups that use different financial and payroll periods for YTD, the Statistics and Statistics Supplement drivers are not budget group specific and use the YTD from the Global level in the Configuration driver. This causes the system to skew the remaining projected and budget amounts causing major issues in budgeting.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

Issue	Description
PFB-07545 - 38 Budget Provider Driver - orphan records [TFS 35319]	<p><b>Issue:</b> On the initial process of the [BUD20] 38 Provider Vol driver, WRVUs were stored in BUDGET2020_Provider Vol for this provider. The Provider_Comp tab used the Global configuration to process WRVUs. When the user changed PROVIDER.VolSum for this provider, [BUD20] 38 Provider Vol driver correctly did not include this provider in the refreshed results. However, there is no zero-on-save logic in [BUD20] 38 Provider Vol, so the WRVU record for this provider remained orphaned in the BUDGET2020_Provider Vol table.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-07581 - Budget Statistics driver not ACCT.KHABgtCode compliant [TFS 35867]	<p><b>Issue:</b> This driver is <i>not</i> ACCT.KHABgtCode compliant. A previous fix to this utility corrected the issue with the DEPT.KHABgtMap compliance; however, the ACCT has not been identified as an issue as of yet. With the current state of the driver, there can be a situation where the LYA and CYB information come into the driver on separate rows. Some departments that migrated mid-year have multiple records for the same DEPT for Patient Days.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-07738 - Budget Global Data driver AQ1 [TFS 37167]	<p><b>Issue:</b> AQ1 should include the account level in the sum by. When using a multiple account filter for the driver, the accounts are overstated. This is because AQ1 currently only runs at the department level. It returns an account and account description but only through a COALESE function on these fields, returning the first account value of the summed records, which includes multiple accounts. For departments that would return multiple accounts, the accounts are summed together, but the system returns a record with the first account of the summed list and saves back to the table, overstating the account.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-07739 - Budget Global Data driver BudGrp YTD [TFS 37170]	<p><b>Issue:</b> The order in which AQ4 and 5 fire in the Budget Global Data driver should be flipped. AQ5 brings in the Budget Group that is used to build the AQ range for AQ4. Since AQ4 fires first, the budget group field is empty, and the AQ4 value range is not supplied with the budget group to concatenate. This results in AQ4 not returning any YTD values set in the configuration driver for budget groups.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

Issue	Description
Budget Global Data drivers now allow custom filters but users can insert records outside of the filter [TFS 27860]	<p><b>Issue:</b> Users can now define a filter for their four global data drivers and insert records that fall outside of the filter. For example, if a filter includes Acct.khabgtcode=123456, a user can insert AND SAVE a record where the acct.khabgtcode is not 123456. Consequently, the user introduces records in the underlying table and, other than going through OTIS, cannot see or update those records.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Rollover Utility

Issue	Description
PFB-07950 - Copy File Group security can cause the Rollover Utility to fail [TFS 38257]	<p><b>Issue:</b> If the Copy File Group step within the Rollover File Group process fails, the system will not copy the drivers from the previous year. The failed rollover can be caused by a large number of users in security that need to be copied. As a result, this copy process fails to complete within a given time limit.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Templates

Issue	Description
PFB-04772 - Provider - print range [TFS 8909]	<p><b>Issue:</b> When printing plan files, new provider information using Add New Provider or Copy Provider calc methods is not included in the print range.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-05847 - Jobcode tab, column headers in cells EQ78:FB78 reference budget months in cells AG78:AR78 should be a formula driven by the rolling 12 actual history [TFS 16625]	<p><b>Issue:</b> In the Jobcode tab, column headers in cells EQ78:FB78 reference budget months in cells AG78:AR78 when in fact they should be formula driven by the rolling 12 actual history as defined in AQ7:Historical Hours Field Def row 17 (between columns EQ and FB).</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
PFB-06630 - CDMRevenue tab printing [TFS 25476]	<p><b>Issue:</b> When printing the CDMRevenue tab, only key stat rows are included in the output. Non-key stat rows do not display.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

Issue	Description
PFB-06803 - Job code: BP Employee Labor tab zero start rate when no CYA Hours and Dollars [TFS 30894]	<p><b>Issue:</b> When using the Employee Labor type, if the Jobcode block does not have any CYA Hours or Dollars, it calculates the Current Rate as \$0.00 and then forwards that rate to the NYB, basically creating a zero-dollar budget for the job code.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
Staffing tab - Department Other Pay section is missing calc method options [TFS 39107]	<p><b>Issue:</b> When adding a row to the Dept Other Pay section, the system does not display calc methods to select. Users should expect to see the same available calc methods when adding a department in the Other Pay section of the other labor tabs.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
ProviderSummary: Volume on summary tab may not match the values in the sum of months [TFS 39152]	<p><b>Issue:</b> Due to the twelfth month now being editable, a situation can occur where a change in the amt adjustment may not tie to the sum of the twelve months if manual changes are made to the default formulas.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
Employee tab: EPTO row is unexpectedly hidden [TFS 39169]	<p><b>Issue:</b> On the Employee tab, the EPTO row is unexpectedly hidden.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Reports

### Budgeting - Analysis

Location	Description
\Axiom\Reports Library\Budgeting Reports\Budget Analysis\Budget Salary Rate Analysis.xlsx	<p><b>Issue:</b> PFB-07466 - Budget Salary Rate Analysis Report and potentially other budget reports need to be updated to use correct Salaries criteria [TFS 34926]. The issue is that the filter of Acct.FSSummary='E_Salaries' can be too broad and may include Benefits there by skewing the salary rate.</p> <p><b>Symptom:</b> The AQ2 filter needs to be updated to include a filter for Acct.FSDetail='E_Salaries'.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>



## Budgeting - Utilities

Location	Description
\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation: <ul style="list-style-type: none"> <li>Global Expense Reconciliation Report</li> <li>Global Revenue Reconciliation Report</li> </ul>	<p><b>Issue:</b> PFB-06472 - Budget GlobalExpense Reconciliation\GlobalRevenue Reconciliation - update filter [TFS 25560]</p> <p><b>Symptom:</b> The Budget Salary Rate Analysis report uses Acct.FSSummary='E_Salaries' to define the dollars to pull into the report. This will include benefits and contract labor for many clients.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Imports

Location	Description
\Axiom\Imports Library\Management Reporting <ul style="list-style-type: none"> <li>05-Load GL Detail.axi</li> <li>06-Load AP Detail.axi</li> <li>07-Load Materials Issues.axi</li> <li>08-Load Accrued Receipts.axi</li> <li>10-Load Employee Master.axi</li> </ul>	<p><b>Issue:</b> PFB-05444 - GL and AP trans dates adding additional days to date columns [TFS 12021]</p> <p><b>Symptom:</b> Importing native Excel files adds two days to the date fields. The imports will need to be addressed to include a transformation step to accommodate this.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Management Reporting - Payroll

Location	Description
\Axiom\Reports Library\Management Reporting\Payroll\Labor Distribution Detail.xlsx	<p><b>Issue:</b> PFB-06758 - Employee's name does not display in the Labor Distribution Detail report [TFS 29847]</p> <p><b>Symptom:</b> In the Labor Distribution Detail report, within a job code block, the employee's name will not display where the following criteria is met: (1) FY cross over pay periods with both PY and CY periods displayed and (2) the employee had PY data to create the row but does not yet have any CY data.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Management Reporting - Provider Analysis

Location	Description
Reports Library\Management Reporting\Provider Analysis\Provider Productivity	<p><b>Issue:</b> PFB-06699 - Provider Productivity Summary: Coding Distribution Charts reference incorrect data ranges [TFS 26694]</p> <p><b>Symptom:</b> There are two Coding Distribution Charts in this report, both of which reference incorrect data ranges.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Management Reporting - Report Packages and Reporting Batch

Location	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Budget Variance By Dept.xlsx	<p><b>Issue:</b> PFB-06170 - Budget Variance by Dept Statistic Per Unit Formatting [TFS 20181]</p> <p><b>Symptom:</b> The formatting in the statistics section for the Per Unit columns (R, T, AA, AC) of the Budget Variance by Dept report should be hidden in the statistics section. This was not there in previous versions.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
Axiom\Reports Library\Management Reporting\Report Packages\Executive\Budget Variance Summary	<p><b>Issue:</b> PFB-06966 - Budget Variance Summary - conditional formatting [TFS 29706]</p> <p><b>Symptom:</b> The Budget Summary Report includes incomplete conditional formatting. In any of the Variance columns, it only includes one level of formatting that all resolve to green shading. In cases where expenses for the month exceed budget, the account is flagged green, which users interpret as a favorable variance. If the intention is just to flag the variance, maybe using any other color than green or red might be a better design.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	<p><b>Issue:</b> PFB-06875 - Dept Monthly Package: Employee name is blank if the employee changed depts [TFS 29730]</p> <p><b>Symptom:</b> When a user has a fiscal year-end and they run this report if an employee changed departments, the employee name returns blank because the primary table is the current year and the employee ID does not show on that year but does for the prior.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

Location	Description
\Axiom\Scheduler Jobs Library\Management Reporting\Monthly Reporting Batch.axj	<p><b>Issue:</b> PFB-07207 - Budget Variance Rollup produces file processing file with many extra columns [TFS 31887]</p> <p><b>Symptom:</b> When testing several of the Executive and Management reports using file processing, the user noticed that the output files contain extraneous columns off to the right. After looking at the output file, the Excel used range extended to column WWV. The used range in the source report does not go out that far. The same issue occurred in the Budget Variance Summary report.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

### Management Reporting - Utilities

Location	Description
Reports Library\Management Reporting Utilities\Dimension System Structure Reports\System Structure Accounts	<p><b>Issue:</b> PFB-06516 - System Structure Accounts reports pulling in PHYStdLine for non-Provider clients [TFS 25524]</p> <p><b>Symptom:</b> For the System Structure Accounts report, all AQs (AQ 1 through 9) list ACCT.PHYSTDLINE as one of the sum-by criteria, but because the client does not have this dimension field, the system displays an error when they run the report. This report needs to account clients without the Provider module.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	<p><b>Issue:</b> PFB-06821 - Monthly Forecast Utility - PROJDriver changes cannot be saved [TFS 29815]</p> <p><b>Symptom:</b> The PROJDriver sheet is a SaveType 3/document reference table. This sheet expects a user to set up some drivers for each department or entity. However, because this document is a locked asset, users cannot save any changes. As a result, the settings need to be manually inputted every time the utility is opened for use if they want to make any changes. This utility either needs to be unlocked or the PROJDriver sheet needs to include a query that re-populates the spreadsheet on open.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## Management Reporting - Variance Comments

Location	Description
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Review\12Month Comment Review.xlsx	<p><b>Issue:</b> PFB-06491 - VCC - 12 Month Comment Review: Detail comments display even though Summary is selected [TFS 29844]</p> <p><b>Symptom:</b> Detail comments display even though Summary is selected.</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>

## System Files

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	<p><b>Issue:</b> PFB-07042 - Month End Review Dashboard does not snapshot when option selected [TFS 30021]</p> <p><b>Symptom:</b> The Month End Review Dashboard does not snapshot when the user selects this option. Also, when selecting the generate PDF option, the only visible window generates a PDF and not the entire dashboard (all tabs).</p> <p><b>Status:</b> Under consideration for future patch or version release.</p>