Release Notes

Axiom Financial Planning

Version 2019.4

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Contents

Summary

Syntellis is pleased to announce the 2019.4 release of Axiom Financial Planning. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

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. **Complete manual updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

Support

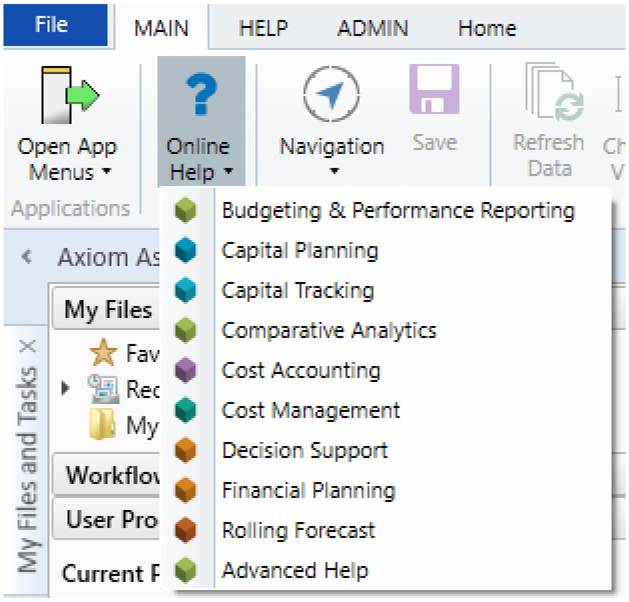
As always, we appreciate your commitment to Syntellis. If you have any questions about your upgrade, please contact us by logging into Axiom, navigating to the online help for your product, and clicking the **Axiom Support** link at the top of the home page.

Training

Syntellis provides world-class resources at your fingertips directly within the Axiom system. Axiom Help provides topics, knowledge base articles, documents, webinar/training announcements, and videos to guide you through managing your system. To access these resources, do any of the following:

- **Online help** - From the Main, Help, or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window.

  NOTE: The online help will only open for products you are licensed to use.



- **Contextual help** - Form/web-enabled features include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right corner of the screen. For more detailed information, open Axiom Help by clicking **Open Help** at the top of the contextual help dialog.

Product upgrade notes

IMPORTANT: You must apply the Axiom 2019.4 upgrade before applying any 2019.4 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2019.4 before the first product upgrade. Refer to the **Axiom 2019.4 Release Notes** and **Axiom Healthcare Suite 2019.4 Release Notes** for considerations before upgrading.

When upgrading to the 2019.4 version of Axiom Financial Planning, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- Syntellis 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 Syntellis delivered report that was moved to a new location will automatically move back to its original location.
- Syntellis product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

New features summary

This section includes a description of the new features and enhancements included in this release.

Transfer to Financial Planning utility enhancements

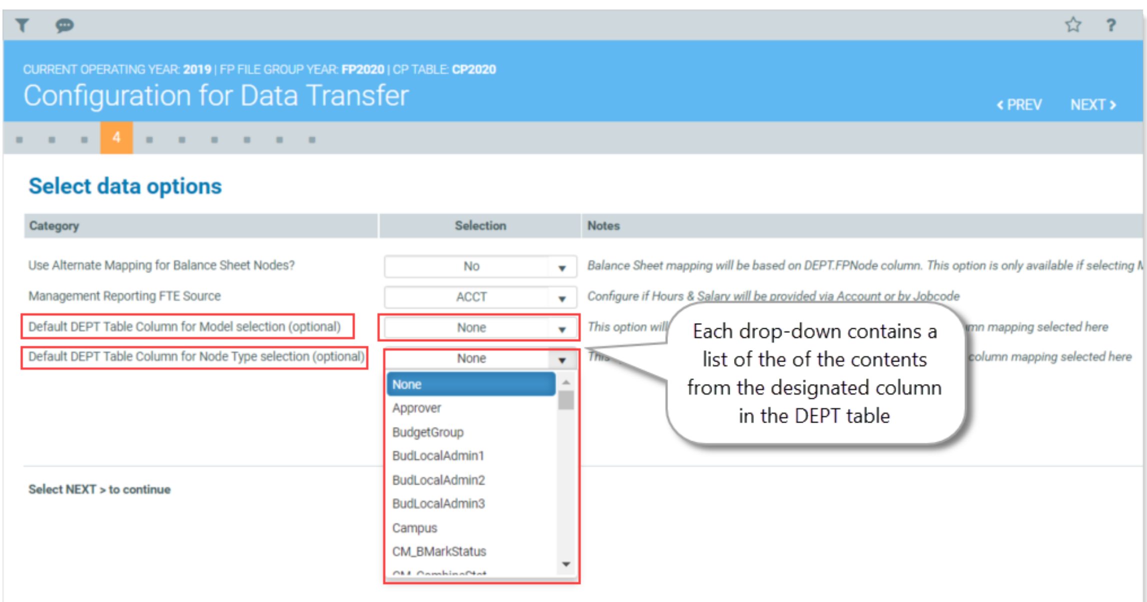
Improvements and additions to the Transfer to Financial Planning utility for the 2019.4 release include the following:

Assign defaults for Model and Node Type selections

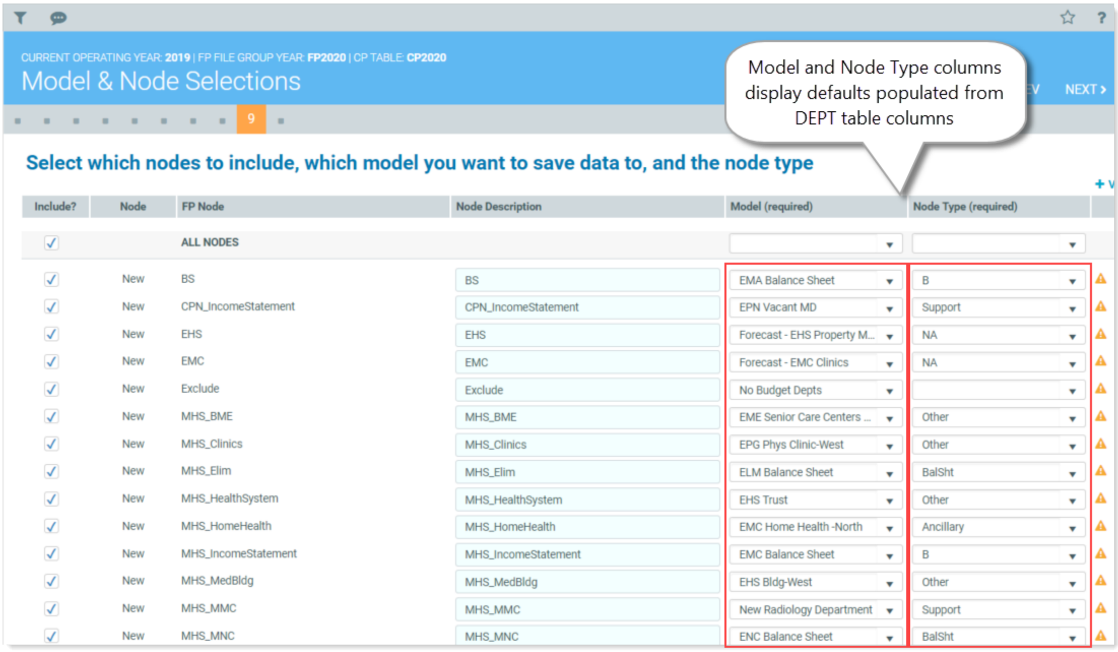
You can designate columns in the DEPT table to use as the default sources for Model selection and Node Type selection on the Model & Node Selections page (page 9).

Two new options on the Configuration for Data Transfer page (page 4) let you select columns from the DEPT table.

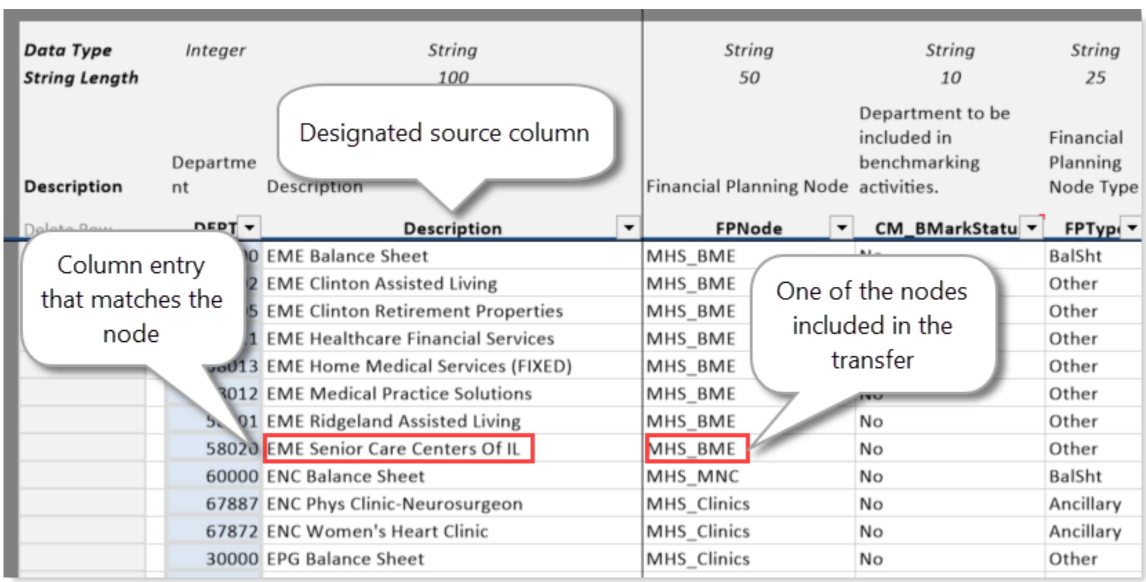
NOTE: This screen is read-only if you selected Rolling Forecast as the source for any included years on page 2 of the utility.



On the Model & Node Selections page, the Model and Node Type columns are pre-populated with entries from the DEPT table columns you selected on page 4.



When sourcing from the DEPT table, the utility pulls from the designated column the item that matches the node included in the transfer:



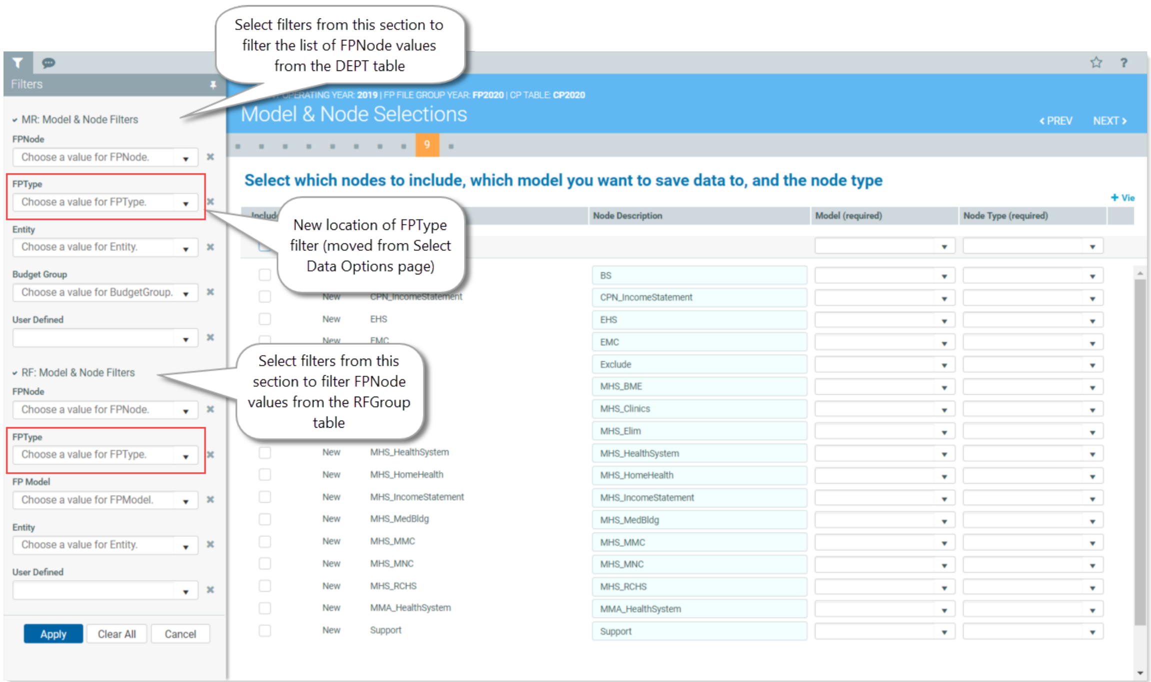
Even with prepopulated columns, you can still make selections from the drop-down menus. The Model drop-downs come from the Model column in the Model table, and the Node Type drop-downs are populated from the Node_Type column of the Node_Type table.

NOTE: Models selected from the DEPT table must be valid models that exist in the Models table, and Node Types must be valid note types that exist in the NODE_TYPE table.

For more information, see “Step 4: Select Management Reporting data options” in “Select years, sources, and data” in the online help.

Filter the list of models and nodes

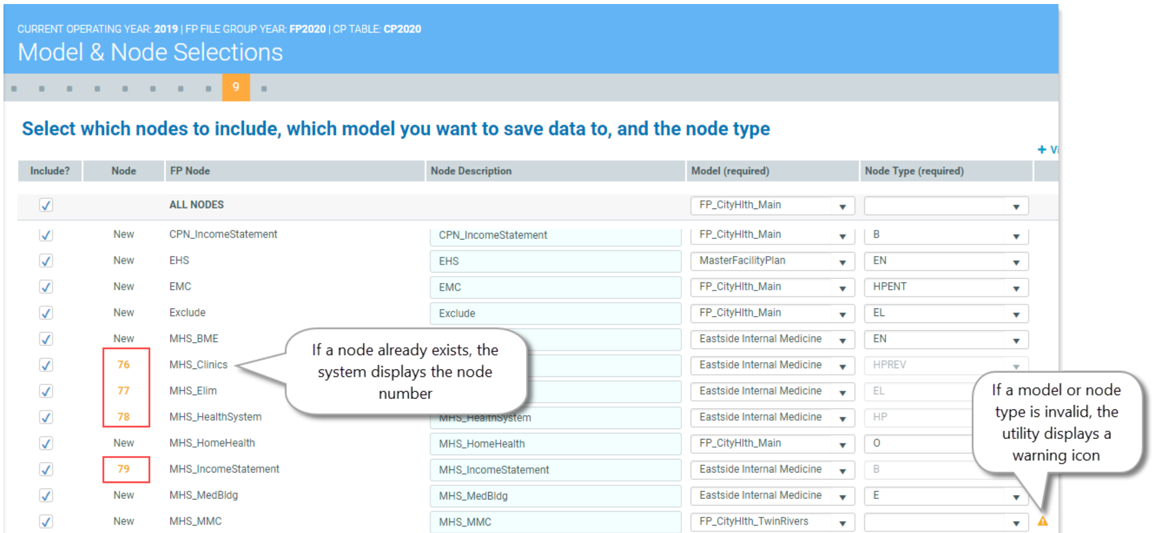
If your organization has a large number of models or nodes, use the new Filters panel to filter the lists on the page to display only the models and nodes you want.



For more information, see “Select nodes, models, and node types” in the online help.

Save data to existing nodes

Previously, the Transfer to Financial Planning utility could only create new nodes, but now it can save new data to existing nodes. This gives you flexibility when sourcing data for your selected years. For example, you can use the utility in tandem with the Annual Rollforward Utility if you want to roll forward one or two years and then use the Transfer to Financial Planning utility to populate data for the other years.



The utility determines if a node already exists based on the FPNode and Description combination. If those are the same as an existing node in the database, then the utility uses the existing node. If the description changes for a node that was previously listed as matching, then the utility creates a new node.

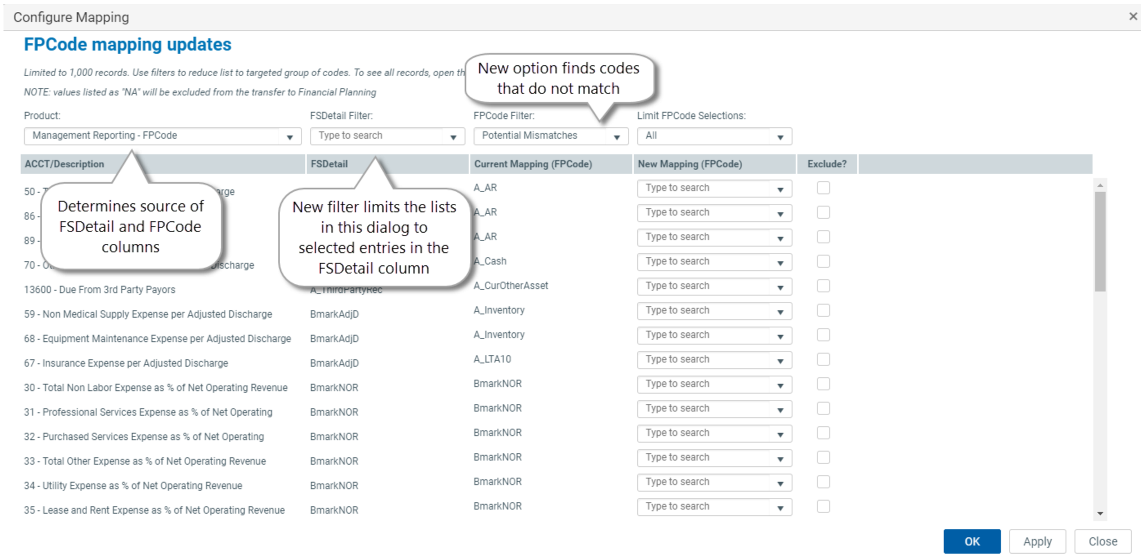
For more information on selecting models and nodes, see "Select nodes, models, and node types" in the online help.

▶ Fix FPCode mapping errors

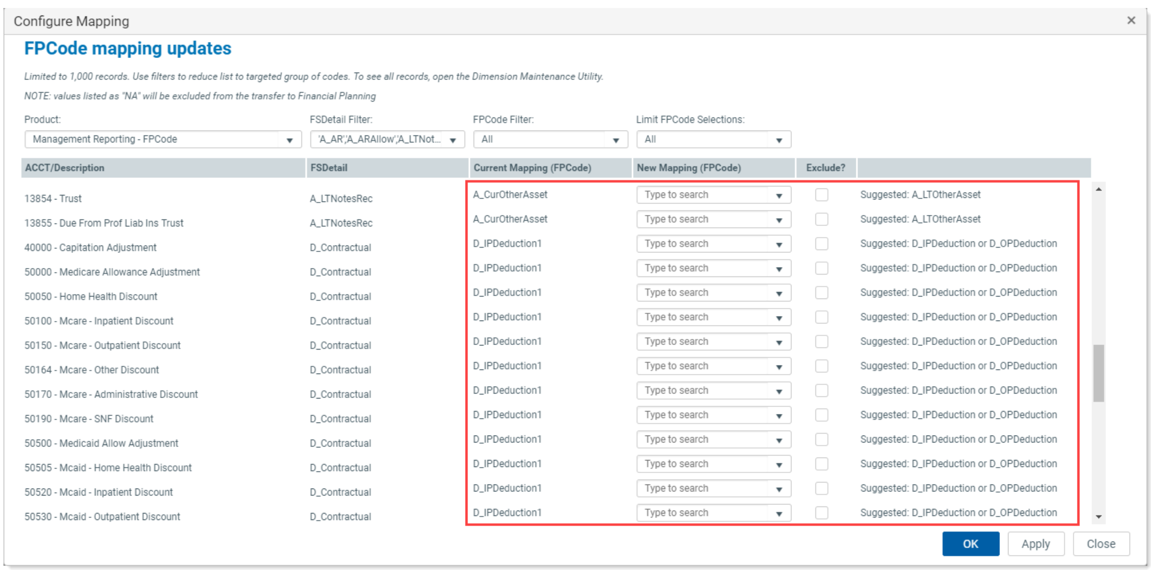
New functionality in the **FPCode mapping updates** dialog provides more help with resolving code mismatches. Features include:

- New FSDetail Filter column:
  - **Management Reporting - FPCode** – Narrows the list of values displayed from the ACCT table's FSDetail column. You can use these FSDetail codes as a guide when determining what FPCode you should select for the New Mapping (FPCode) column.
  - **Rolling Forecast - FPCode** – Narrows the list of RFCODE.FSDetail values.
- FPCode Filter:
  - New filter option **Potential Mismatches** – Filters the list to display what the utility determines to be potential mismatches between FPCodes. For Management Reporting, this compares what is in the ACCT table's FSDetail column with what is in ACCT_FPCODE validation table's FSDetail column for any given FPCode. Entries that do not match are displayed in this list.
    For example, if a code has an FSDetail = R_NonOpRev, and the code is mapped to an FPCode that has an FSDetail = E_Salaries, this would be a mismatch.
  - Column renamed for clarity from "Filter."

- FPCode Drop-down Filter renamed to “Limit FPCode Selections.”



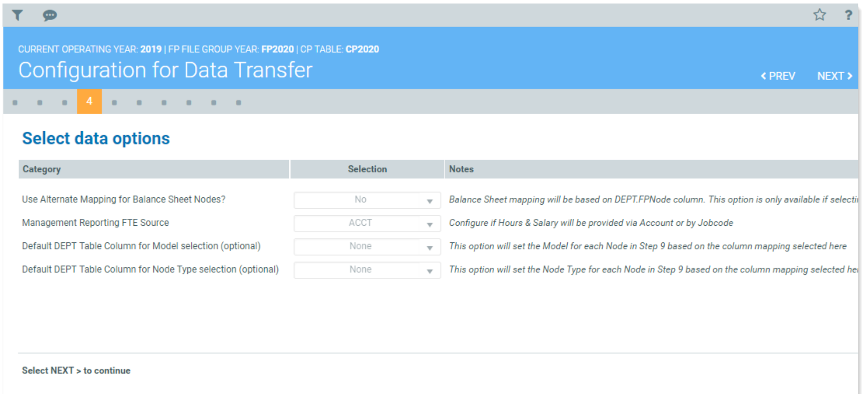
- **Code mapping suggestions** – Now the FPCode mapping tool provides code mapping suggestions to help you resolve code mapping issues. For the most common mappings, the system displays suggestions in the far-right column.



For more information on resolving code mapping issues, see “Fix FPCode data mapping errors” in “Fix node and code mapping errors” in the online help.

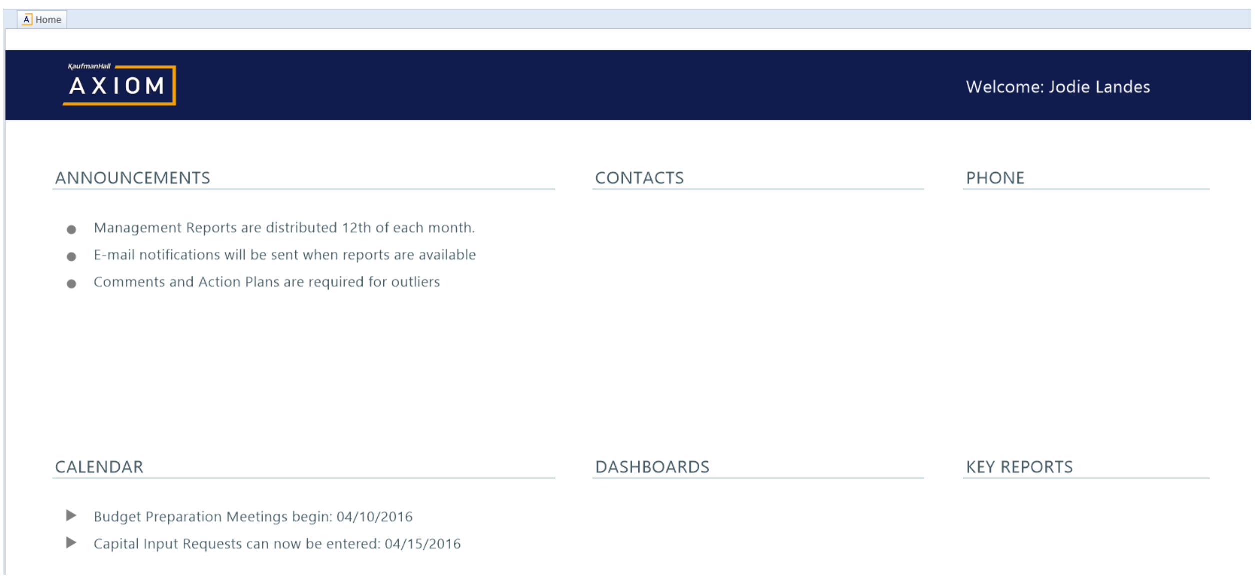
▶ Select Data Options page is read only for Rolling Forecast

The Select data options page (page 4) is no longer hidden when you select Rolling Forecast as a data source. Instead, the page displays as read only for pagination consistency in the utility.



Redesigned Home page for Windows and Excel clients

The default home page used in the Windows and Excel clients has been updated with the current Axiom logo and a new look-and-feel.



Issues resolved in 2019.4

The following table lists the resolutions for issues addressed in 2019.4, released on December 16, 2019:

Issue Description	Description
PFB-07667 - OP RVUs not showing in Key Op Stats on F/S Reports [TFS 36410]	**Summary:** Users who select Outpatient Revenue/Visit units (RVUs) on nodes such as Operations do not see an Outpatient RVUs line displayed in the statistics sections of the Financial Statements or the Financial Statements with Detail reports. **Resolution:** Corrected by adding OP RVUs to the appropriate section in both reports.
Annual Rollforward Utility Model Description error [TFS 39061]	**Summary:** In the Model Selections page (page 5) of the Annual Rollforward Utility, the Description column is displaying node descriptions instead of model descriptions. **Resolution:** Corrected by adjusting the code so that it pulls in the correct information for the model description.
Management Reporting Variance Analysis Report generates error upon launch [TFS 39075]	**Summary:** The Management Reporting Variance Analysis report produces an error when launched if the SuiteVariables for RFActiveFileGroup has a space in the name. **Resolution:** Corrected in the Variables tab by changing the formulas in the appropriate cells to remove spaces in the RFActiveFileGroup name.
DMU ACCT Selection requires refresh twice to display FPCode [TFS 39088]	**Summary:** When opening the Dimension Maintenance utility (DMU), if the user selects the ACCT dimension, no columns display until the user refreshes the data after the DMU opens. **Resolution:** Corrected by updating Axiom Query 1 to refresh automatically on open.
PFB-08042 - Scenario Review [TFS 39583]	**Summary:** The GETDOCUMENT link Go To Capital Analysis in the Scenario Review report does not work if the target sheet is hidden. **Resolution:** Corrected by changing the Capital sheet to Visible on the report's Control Sheet.
Transfer to Financial Planning bucket list [TFS 39732]	**Summary:** Clients who have Performance Reporting but not Budgeting are unable to use the Transfer to Financial Planning utility. **Resolution:** Corrected by changing "Budget Planning" to "Performance Reporting" on the Navigation tab.

Issue Description	Description
Transfer to FP - Product check is looking for 'Rolling Forecasting' rather than 'Rolling Forecast Quarterly' (and a couple more items) [TFS 39825]	**Summary:** In the first Configuration for Data Transfer page (page 2), of the Transfer to Financial Planning Utility, when a user tries to select Rolling Forecast as a file source option, either Rolling Forecast is not listed as an option, or selecting Rolling Forecast causes an error. **Resolution:** Corrected by adjusting the formulas on the Variables tab to add the missing space. Added a check on the AdditionalLists tab to verify that the RF table exists.
Interactive User guide defects [TFS 40627]	**Summary:** Links to the online help in the Interactive User Guide are hard coded and therefore break when the related help topics are moved or changed within the Financial Planning online help. **Resolution:** Corrected by changing the hard-coded links to dynamic links using aliases.

Manual setup instructions

There are no manual setup or configuration steps required for this release.