Release Notes
Axiom Budgeting and Performance Reporting
Version 2020.2.2

AXIOM

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Contents

About the Release Notes

Syntellis is pleased to announce the 2020.2.2 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.

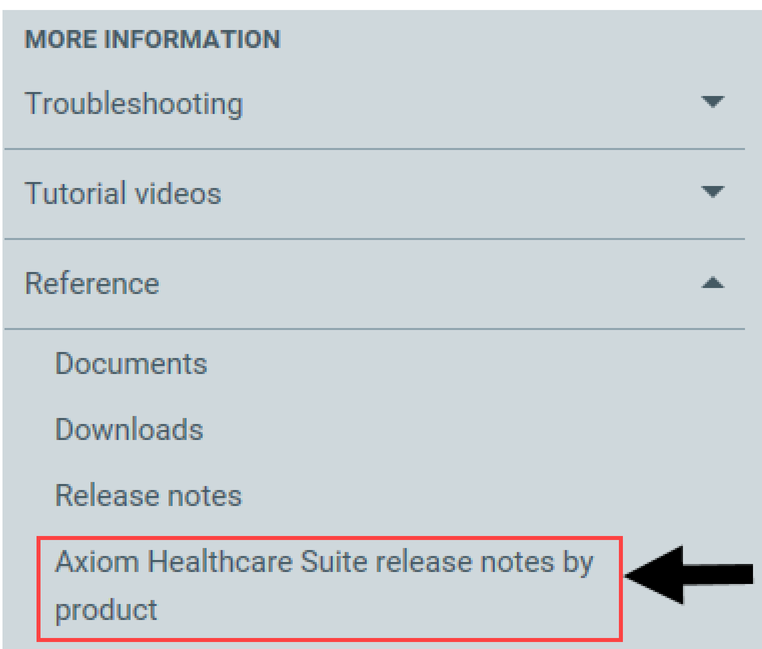
The purpose of these release notes is to provide you with the following:

- High-level descriptions of new features
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

TIP: Periodically, the release notes are updated when new information is available, including patch release fixes. To view the latest release notes, we encourage you to view them in the Axiom Budgeting and Performance Reporting online help. On the help home page, simply click the Release Notes link at the top of the page.

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

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



New features in 2020.2

Axiom Budgeting and Performance Reporting 2020.2 delivers features designed to allow comparison of the proposed budget to a configurable set of internal and external peer group metrics. This can offer actionable insights into areas of change that might not otherwise be readily available when comparing to one's own historical data.

In Performance Reporting, we enhanced drill down functionality to now include vendor images. This can improve the value of the drilled content and enhance efficiency while remaining in the Axiom environment.

Rely on a market-informed guide to identify the largest opportunities to impact your budget

The new Budget Assessment and Metric Explorer dashboards includes Axiom Comparative Analytics data embedded directly into the Budgeting workflow to provide access to comparative and market-based information while setting and adjusting budgets. This data allows you to create an achievable budget and discover the best strategies to end your fiscal year on target.

Improve monthly reporting efficiency with instant access to supporting documents

You can now view the detail behind numbers on monthly reports, including purchase detail for expenses, without needing to exit the reporting environment to research payment details that may exist outside the Axiom Performance Reporting in other documents. This helps increase efficiency by offering instant access to the documentation that supports the detail needed to make more informed operating decisions. It also saves your organization time and money by allowing you to set up and manage connections to your document systems without product or report customization.

Rely on a market-informed guide to identify the largest opportunities

Why use this feature

The new Budget Assessment and Metric Explorer dashboards includes Axiom Comparative Analytics data embedded directly into the Budgeting workflow to provide access to comparative and market-based information while setting and adjusting budgets. This data allows you to create an achievable budget and discover the best strategies to end your fiscal year on target.

> **NOTE:** This feature requires a license for Axiom Comparative Analytics.

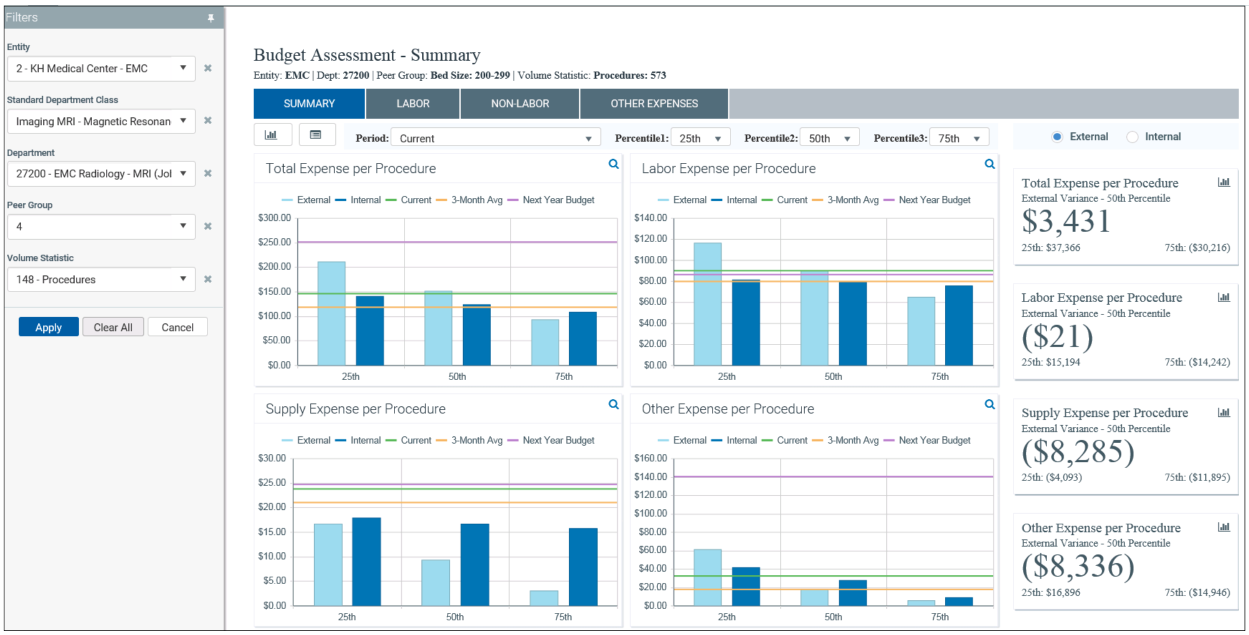
How this feature works

What: The Budget Assessment dashboard displays comparative budget charts to help compare your next year budget to peer groups and percentiles for your market or organizational context.

Where: In the **Budgeting** or **Bud Admin** task pane, in the **Budget Reporting** section, double-click **Budget Assessment**.

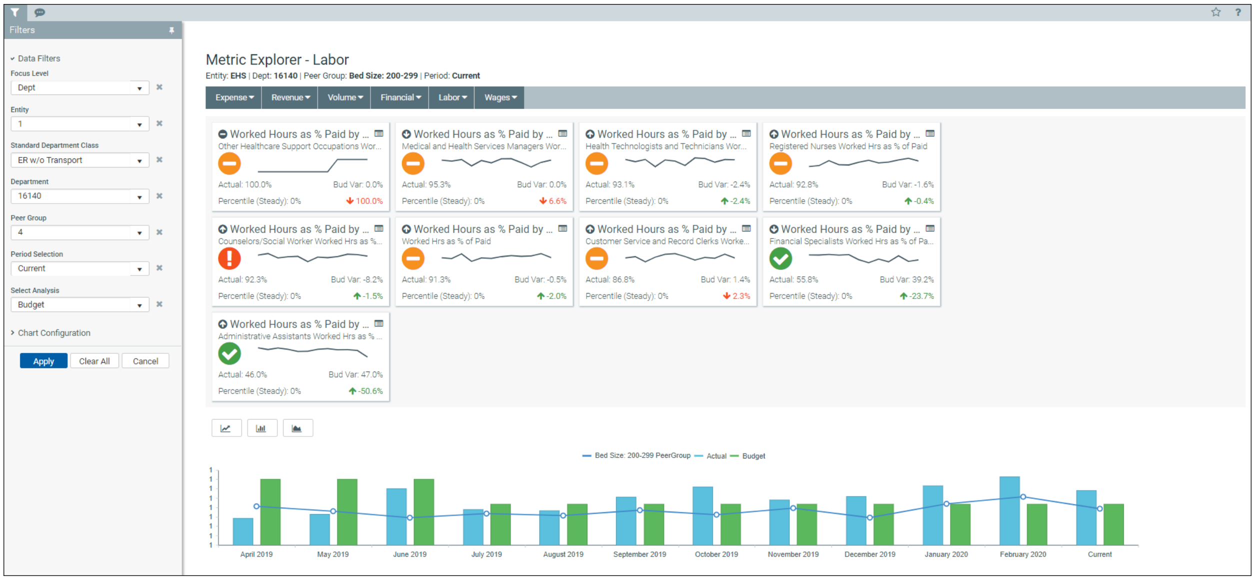
Who: Users must be assigned either the Bud Admin or Budget User role along with the Comparative Analytics - Dept role to view the dashboard.

How: Use the filter options on the left side of the page to select your organization's entity and department to include in the dashboard as well as the peer group to compare your entity and department against.



Example of the Budget Assessment dashboard

Click here to watch a video demonstration



Drill down to details from the Budget Assessment dashboard to the Metric Explorer dashboard

Click here to watch a video demonstration

Where to find more information

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

- "Working with the Budget Assessment dashboard"
- "Working with the Metric Explorer dashboard"

Improve monthly reporting efficiency with instant access to supporting documents

Why use this feature

You can now view the detail behind numbers on monthly reports, including purchase detail for expenses, without needing to exit the reporting environment to research payment details that may exist outside the Axiom Performance Reporting in other documents. This helps increase efficiency by offering instant access to the documentation that supports the detail needed to make more informed operating decisions. It also saves your organization time and money by allowing you to set up and manage connections to your document systems without product or report customization.

How this feature works

What: You can define links between Axiom reporting and external document imaging systems to provide seamless drilldown into document detail. This eliminates the need to exit the reporting environment to research payment details, invoices, purchase orders, etc.

Where: The GLTRANSACTIONS_20XX table includes a new column, VendorImageLink, that allows you to import or manually enter a URL to the location where the document image resides. The 06-Load AP Detail and 08-Load Accrued Receipts imports have been updated to automatically import document image links, but you can also configure custom imports to include importing of these links. The Month End Review dashboard and the Department Monthly Package have been updated to display document images links, if available.

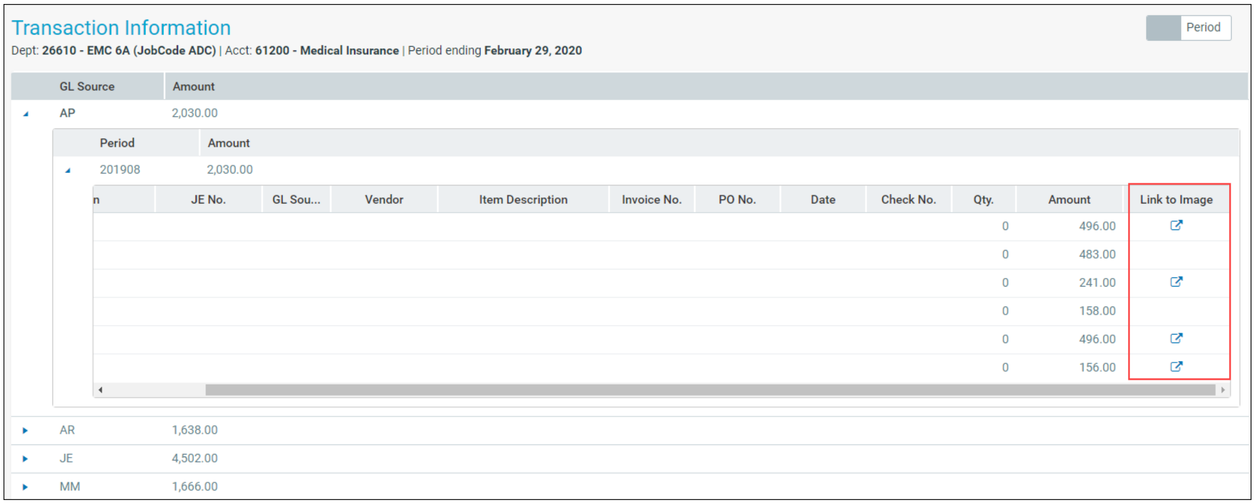
> **NOTE:** To import image URLs, you need to add a new column to your import file named VendorImageLink. For more information, see the "Accounts payable" and "Accrued receipts/received not invoiced" file layout topics in the online help.

Who: No changes to user roles needed to view a transaction image.

How: To open the GLTRANSACTIONS_20XX table, go to **Axiom Explorer > Table Library > Management Reporting > Actuals >Transactions**. To view the Month End Review dashboard, go to **Mgmt Admin task pane > Management Reporting**, and double-click **Month End Review**. To run the Department Monthly Package, go to the **Mgmt Admin task pane > Management Reporting > Manager**, and double-click **Dept Monthly Package**.

Data Type	*Integer*	*Integer*	*Integer*	*String*	*Integer*	*String*	*String*	*String*	*String*
String Length				*10*		*100*	*50*	*10*	*1000*
Description									Vendor Image Link
Delete Row	ACC	DEPT	GLPERIOI	GLSOURCI	RECORDII	JEDes	JENun	JESourc	VendorImageLink
	53210	15300	201812	AP	925				
	53210	15300	201912	AP	925				
	58000	27450	201508	AP	6533				
	58000	27450	201606	AP	6533				
	58000	27450	201608	AP	6533				
	58000	27450	201706	AP	6533				
	58000	27450	201708	AP	1				
	58000	27450	201708	AP	6533				

New VendorImageLink column in the GLTRANSACTIONS_20xx table



Transaction Information

Dept: **26610 - EMC 6A (JobCode ADC)** | Acct: **61200 - Medical Insurance** | Period ending **February 29, 2020**

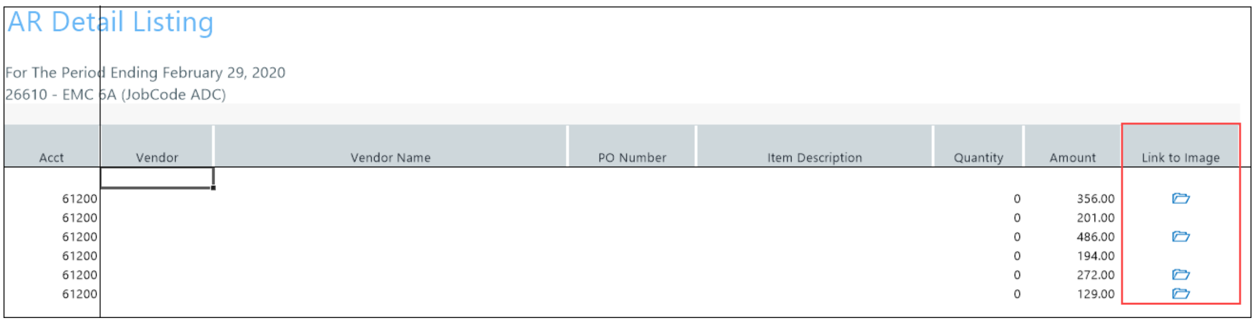
Period

GL Source	Amount
AP	2,030.00
AR	1,638.00
JE	4,502.00
MM	1,666.00

Period	Amount
201908	2,030.00

n	JE No.	GL Sou...	Vendor	Item Description	Invoice No.	PO No.	Date	Check No.	Qty.	Amount	Link to Image
									0	496.00	
									0	483.00	
									0	241.00	
									0	158.00	
									0	496.00	
									0	156.00	

Open document images for AP and AR transactions in the Variance Comments Collection tab in the Month End Review dashboard



AR Detail Listing

For The Period Ending February 29, 2020

26610 - EMC 6A (JobCode ADC)

Acct	Vendor	Vendor Name	PO Number	Item Description	Quantity	Amount	Link to Image
61200					0	356.00	
61200					0	201.00	
61200					0	486.00	
61200					0	194.00	
61200					0	272.00	
61200					0	129.00	

Links to document images are also included in the AP and AR tabs in the Department Monthly Package

Where to find more information

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

- "Managing document image links"
- "Using the Variance Comments Collection tab in the Month End Review dashboard"
- "Understanding Monthly Variance Analysis"

What to know before upgrading

IMPORTANT: You must apply the Axiom Software 2020.2.2 upgrade before applying any 2020.2.2 Axiom product upgrades. Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2020.2.2 before the first product upgrade. Refer to the **Axiom Software 2020.2.2 Release Notes** and **Axiom Healthcare Suite 2020.2.2 Release Notes** for considerations before upgrading.

When upgrading to the 2020.2.2 version of Axiom Budgeting and Performance Reporting, keep in mind the following:

- Along with upgrading to Axiom Software 2020.2, you will also need to upgrade to Axiom Comparative Analytics 2020.2.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- This product upgrade contains updated templates, calculation methods, and remediated defects.
- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

Preparing and scheduling upgrades

Summary of the upgrade process:

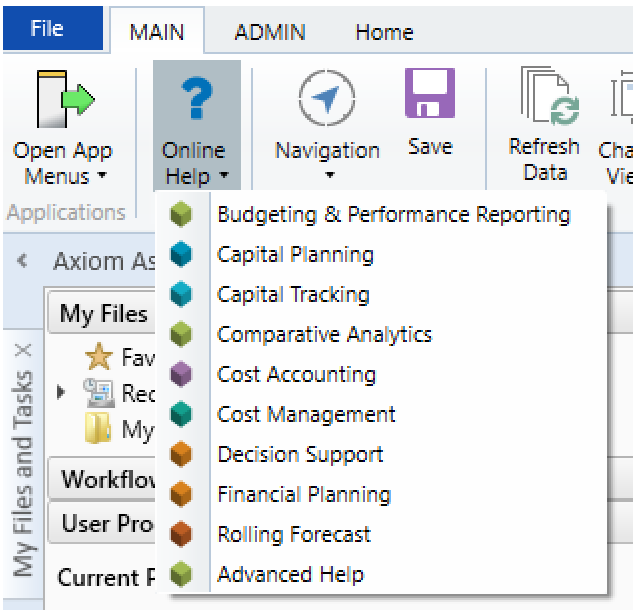
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support@syntellis.com to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
   - Desired Axiom Software platform version.
   - Desired Axiom for Healthcare product and version.
   - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Syntellis can do this.
   - Propose an approximate two-hour downtime window when Syntellis can apply update(s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Syntellis).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

Getting help and training

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

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

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

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

Escalating to Axiom Support

As always, we appreciate your commitment to 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.

Issues fixed in 2020.2.1

The following tables list the resolutions for issues addressed in 2020.2.1, released on July 20th, 2020:

Driver, template, calc method, and other updates

Calc Methods

Issue	Description
PFB-08617 - Other Pay calc method changes do not remain upon rebuild [TFS 46293]	**Issue:** When changing the calc method of a pay type within Other Pay (Dollars only), the default calc method of dimensions is what rebuilds back into a plan file. In the Bud_Pay12_yyyy table, there is no BudCM or BudSpread column as there is in the financial budget table Budyyyy to store the name of the changed calc method. **Resolution:** Corrected by adjusting logic for calc method library settings to assign calc method from sheet for dollar type AQs on labor tabs. Adjustment retrieves assigned calc method on rebuild of plan files.
PFB-08746 - Stat_Rev Global Sum calc method not working correctly [TFS 47416]	**Issue:** In the Global Sum calc method of the Stat_Rev tab, the GetData formulas in columns CH:CK, which reference the LookUpCol from Global Sum driver, currently looks for Global department/account and budget group exceptions. If it finds a Global, the system stops there and does not look for any department/account or budget group exceptions. **Resolution:** Corrected by identifying GetData formulas in columns CH:CK for multiple calc methods and rearranged the order to retrieve the proper description and rates.
PFB-08941 - Provider Comp: Incorrect formula for Global Stat reference [TFS 49515]	**Issue:** In the ProviderComp calc method, the last part of the formula is incorrect for columns K and M (column L is correct). Also, the formula should reference column DM in columns K-L. **Resolution:** Identified logic in columns K-L for Summary View and Detailed View for interfaces and Add New Provider blocks to correct field lookups (e.g. CYPTtl, YTD, CYPCalc respectively), depending on the column. In addition, updated the formulas to reference PayType (column DM) to determine a code to lookup the ProviderVol driver table.

Drivers

Issue	Description
PFB-08656 - Circular reference occur in the Labor Rates driver [TFS 46851]	**Issue:** In the Labor Rates driver, the formula in column AL of the Default Blank Group block is =AL79, but the formula inserted by the AQ is different. A circular reference occurs on placement of the calc method. **Resolution:** Corrected by adjusting the formulas to remove the circular references in the Default Blank Group calc method.

Data Management

Issue	Description
PFB-08757 - LOCATION.Description is too short [TFS 48309]	**Issue:** When value codes on the table Location and column Description(LOCATION.Description) exceed 50 characters, the update fails and the system displays an error. **Resolution:** Corrected by changing the max string length for LOCATION.Description field to 50 from 100.
PFB-08772 - Character limit in the InitiativeID description [TFS 48310]	**Issue:** Request to Increase the string length limit of the Description column in the InitiativeID table from 50 to 100 to support initiatives with names that include more than 50 characters. **Resolution:** Corrected by changing the max string length of the Description field in the INITIATIVEID dimension from 50 to 100.

Templates

Issue	Description
PFB-07566 - NoBudget calc method does not recognize CYPMethod [TFS 36850]	**Issue:** In the Expense tab, the NoBudget calc method does not recognize CYPMethod. **Resolution:** On the Expense tab, corrected by updating the NoBudget calc method to recognize CYPMethod. On the Stat_Rev tab, corrected the NoBudget calc method logic to use the same logic in column CK used on the Expense tab.

Issue	Description
PFB-07910 - Stat_Rev: Apply inflation to detail accounts set to No is still being applied [TFS 38187]	**Issue:** 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. **Resolution:** Corrected the logic in multiple formulas in the Stat_Rev sheet to query Yes/No from the RevenueAdjustments driver for the plan file BudgetGroup.
PFB-08673 - No option to interface payments in Budget Provider Detail - Payments [TFS 46722]	**Issue:** When reviewing the configuration and setup for Provider Detail, there is the option to interface payments. However, interfacing payments is set to use AQ10, but it is hard coded to be turned off. **Resolution:** Identified that an existing issue with the decommissioned ProviderDetail!AQ10. Corrected by activating and reconfiguring the AQ along with incorporating into the RunAxiomQueryBlock functionality.
PFB-08646 - Incorrect formulas in Add New JobCode Block calc method on the Staffing tab[TFS 46821]	**Issue:**When using the staffing labor method and then adding a new jobcode, the current logic was used so that the FTE would adjust to the calcluated value based on the Start/End range used in column AE,AF. When we did not have the current formula, the FTE would not factor down to the correct value if the start month was other than 1. So for example, if I added 1. FTE for the period 7-12, that is six months for the effective FTE sholuld be .50. So the current formula was allowing for this. HOWEVER, it is incorrect in that it is factoring down too much. **Resolution:** Corrected by removing the first factor from the eleven cells with incorrect formulas in column Q.
PFB-08718 - Salaries Do Not Match error missing ProviderComp dollars [TFS 47470]	**Issue:** On the ProviderComp tab, in the attic, we changed how we save the ProviderComp salary value for use in the Salaries Do Not Match flag on the Expense tab. Since ProviderComp is now a plan file part, we saved this value using a pseudo code. This value was then to be used on the Expense tab to compare total salaries. However, the value on ProviderComp was not being saved to the database. **Resolution:** Identified the [save] tag changes needed to correct the issue.

Issue	Description
PFB-08897 - Overtime rate for new job codes defaults to the base rate rather than reading the percentage set in the Labor Configuration driver [TFS 48870]	**Issue:** When adding a new job code to the Jobcode tab and using History as the setting for pay rates, overtime defaults to the base rate rather than reading the percentage set in the Labor Configuration driver. **Resolution:** Corrected by adjusting column H in the Jobcode calc method, allowing overtime rate to reference the labor configuration setting for new job codes.
PFB-08920 - Formula issue in ProviderComp 40 line calc method [TFS 49513]	**Issue:** In the ProviderComp tab, the formula in the monthly budget dollars columns (AT:BE) for the Percent of Gross (line 9) of the ProviderComp calc method is incorrect. **Resolution:** Corrected by adjusting the formula in range AT:BE so that it will multiply the result by EZ148 to correctly calculate a monthly amount for the Percent of Gross line.

Utilities

Issue	Description
PFB-08318 - Budget Deductions Utility: Contractual Allowance totals row excludes Capitated row [TFS 41840]	**Issue:** The Contractual Allowances row excludes the Capitated row in the summation formula. **Resolution:** Corrected the Contractual Allowances row to include the Capitated row in each block.
PFB-08865 - Budget Deduction includes incorrect HideRow logic starting at Payor 10 (Row719) [TFS 48458]	**Issue:** Budget Deduction includes incorrect HideRow logic starting at Payor 10 (row 719). Any organization with more than nine payors will encounter this issue. **Resolution:** Corrected the HideRow logic so that all 20 payors handle the show/hide logic consistently.

Report updates

Management Reporting - Dashboards

Issue	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\VCC_KHA_Drill03Employee.xlsx	**Issue:** PFB-08687 - Month End Review displays zero data for the current month's actual column [TFS 48337] **Symptom:** The Employee drill report (VCC_KHA_ Drill03Employee) in the Month End Review displays zero data for the current month's actual column. The drill on the job code (VCC_KHA_Drill02JobCode) shows dollar values for the current month but drilling on that job code, which opens the Employee drill report, shows no values for dollars in current month.] **Resolution:** Identified that the Employee drill uses different logic for Dollars Actuals, and corrected the issue by implementing logic similar to the JobCode drill.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\VCC_KHA_Drill07JE.xlsx	**Issue:** Change verbiage in Month End Dashboard > VCC > Transaction drill headers [TFS 49287] **Symptom:** In the Month End Review dashboard > Variance Comments Collection tab > Transaction drill, change the data grid header from "JE Descrip" to "Description". **Resolution:** Corrected the following: • Changed "JE Descrip" to "Description" • Changed "JE Src." to "GL Source"

Management Reporting - Report Packages

Issue	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** Variance Alert report seems incomplete or includes too much information [TFS 42198] **Symptom:** In the Department Monthly Package, the Variance Alert report seems incomplete or includes too much information. There are no distinct reporting sections, specifically Expense sections, as compared to the previous report, and all the alerts reflect as favorable. **Resolution:** Corrected by updating an AQ1 filter to only include valid exception records.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** Content in the BudVar, EmpID, and JC tabs do not output correctly when processing files [TFS 42209] **Symptom:** In the Dept Monthly Package, the hide row does not work for the Summary, Revenue, Expense, Per Unit Summary, Staffing Information, JobCode, and Employee ID tabs when performing File Process. **Resolution:** Platform change corrected with update of Axiom Software in a previous version.

Management Reporting - Utilities

Issue	Description
\Axiom\Reports Library\Management Reporting Utilities\Payroll\BiWeekly to Monthly.xlsx	**Issue:** PFB-08512 - Biweekly to Monthly utility does not correctly classify non-accruing pay types [TFS 45595] **Symptom:** In the BiWeekly to Monthly report, non-accruing pay types (PAYTYPE.ACCRUE='NO') use the month number reference in cells I9:T9, which are hardcoded 1 thru 12. This range should be dynamic for clients whose fiscal year is not January through December. **Resolution:** Corrected by adjusting the static range I9:T9 utilized in SUMIF functionality to be dynamic.

Issues fixed in 2020.2.2

No client facing issues were addressed in 2020.2.2, released on August 17th, 2020.

Manual configuration instructions and technical considerations

Change to Axiom security update utilities

In the 2020.2 release, we have made an important change to the security utilities for Axiom Budgeting and Performance Reporting. Each utility now uses its respective sub-system exclusively. For example:

- \Axiom\Reports Library\Budgeting Utilities\Security\Budget Security Update.xlsx
- \Axiom\Reports Library\Management Reporting Utilities\Security Setup\Performance Reporting Security Update.xlsx

Each security utility is now exclusively using its respective sub-system role as a requirement to activate the [Save] tag on the related security utility.

For example, for Performance Reporting, if either the "IsEnabled" or the "Management Reporting System" are FALSE, the save tag will not activate. Both conditions must be TRUE to save.

In addition, a new Data Filter has been applied to AQ1 to limit the qualifying records into this utility of: IsEnabled=TRUE AND Subsystems LIKE '%Management Reporting%'

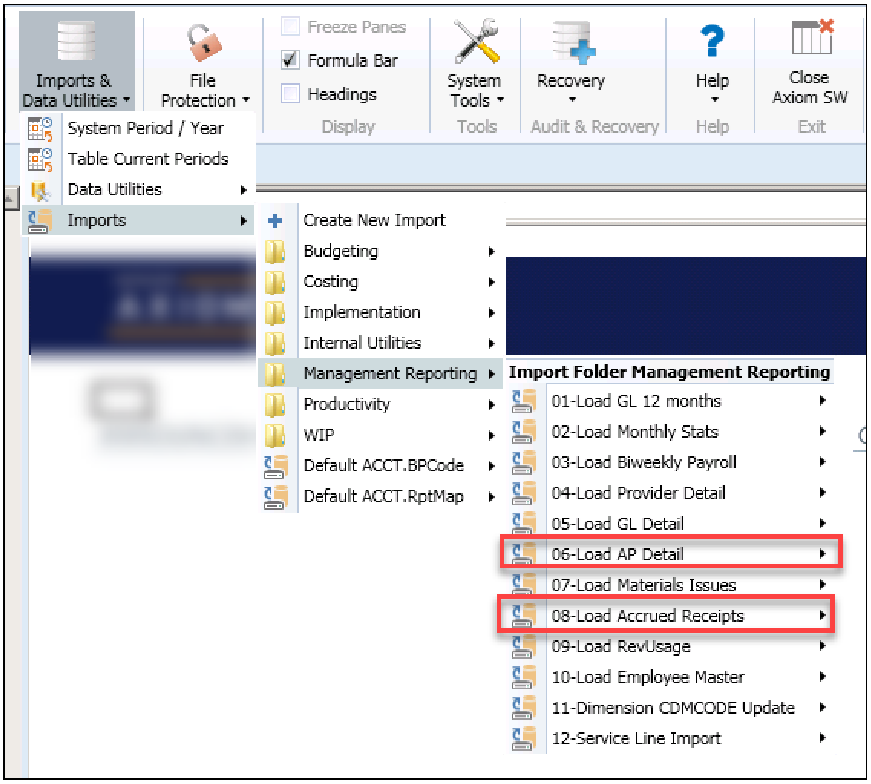
For the Budgeting Security utility, a similar change applied. For example, if either the "IsEnabled" or the "Budget Planning System" are FALSE, the save tag will not activate. Both conditions must be TRUE to save.

In addition, a new Data Filter has been applied to AQ1 to limit the qualifying records into this utility of: IsEnabled=TRUE AND Subsystems LIKE '%Budget Planning%'

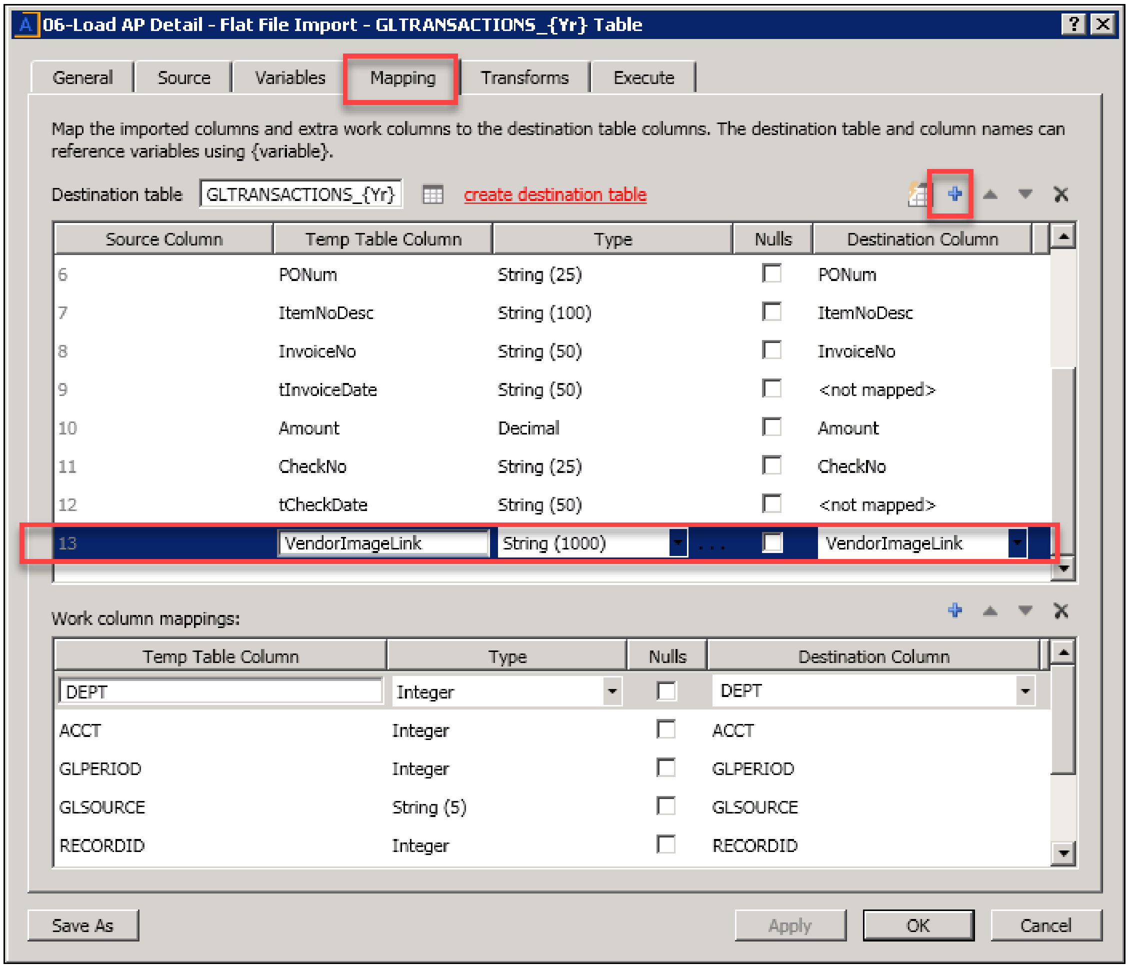
Drill to Imaging Vendor Link

The 06-Load AP Detail and 08-Load Accrued Receipts imports do NOT include document image links because each client import is unique. Therefore, you will need to manually update your imports by completing the following steps:

1. Navigate to the AP Detail import and select **Edit**.



2. In the **Load AP Detail** dialog, click the **Mapping** tab.
3. In the **Mapping** tab, on the right above the Destination column, click the **blue plus** icon to add a new row.
4. In the new row, enter information in the **Temp Table Column**, **Type** column, and **Destination Column**, as shown in the following example.


06-Load AP Detail - Flat File Import - GLTRANSACTIONS_{Yr} Table
General
Source
Variables
Mapping
Transforms
Execute
Map the imported columns and extra work columns to the destination table columns. The destination table and column names can reference variables using {variable}.
Destination table
GLTRANSACTIONS_{Yr}
create destination table
Source Column
Temp Table Column
Type
Nulls
Destination Column
6 PONum String (25) PONum
7 ItemNoDesc String (100) ItemNoDesc
8 InvoiceNo String (50) InvoiceNo
9 tInvoiceDate String (50) <not mapped>
10 Amount Decimal Amount
11 CheckNo String (25) CheckNo
12 tCheckDate String (50) <not mapped>
13 VendorImageLink String (1000) VendorImageLink
Work column mappings:
Temp Table Column
Type
Nulls
Destination Column
DEPT Integer DEPT
ACCT Integer ACCT
GLPERIOD Integer GLPERIOD
GLSOURCE String (5) GLSOURCE
RECORDID Integer RECORDID
Save As
Apply
OK
Cancel