

Release Notes

Axiom Budgeting and
Performance Reporting
Version 2020.3.1

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame made of two parallel lines, one light blue and one light purple, which are slightly offset from each other.

AXIOM

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About the Release Notes

Kaufman Hall is pleased to announce the 2020.3.1 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 features in 2020.3

New 2022 budgeting and management reporting tables

Multiple tables have been added to the Table Library for 2021 budgeting and planning purposes.

New 2022 budgeting and management reporting tables

► Why use this feature

The following tables have been added to the Table Library for 2021 budgeting and planning purposes:

- \Axiom\Table Library\Budgeting\Flex Budget\FLX2022
- \Axiom\Table Library\Management Reporting\Actuals\Financial\ACT2022
- \Axiom\Table Library\Management Reporting\Actuals\Payroll\ACT_PAY12_2022
- \Axiom\Table Library\Management Reporting\Actuals\Payroll\ACT_PAY27_2022
- \Axiom\Table Library\Management Reporting\Actuals\Payroll\EMPLOYEE_ROSTER_2022
- \Axiom\Table Library\Management Reporting\Actuals\Physician\ACT_PROV_2022
- \Axiom\Table Library\Management Reporting\Actuals\Rev Usage\ACT_RU_2022
- \Axiom\Table Library\Management Reporting\Actuals\Transactions\GLTRANSACTIONS_2022
- \Axiom\Table Library\Management Reporting\Actuals\Health Plan\ACT_HP_2022
- \Axiom\Table Library\Management Reporting\Actuals\CY Forecast\CYF2022

NOTE: The CYF2022 tables does not include the edits made for the revised CYF utility made for the COVID-19 response. Those updates, if made, were to facilitate a rapid response to the current table and are not included as a standard product change at this time.

► How this feature works

What: New 2021 tables are now accessible in the Axiom Table Library.

Where: In the **Admin** ribbon tab of the Axiom Windows or Excel Client, click **System Browser**. In the **Libraries** section, click the **Table Library** folder.

Who: Users must be assigned the Bud Admin role.

How: Open and use the table, as needed.

What to know before upgrading

IMPORTANT: You must apply the Axiom 2020.3.1 upgrade before applying any 2020.3.1 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2020.3.1 before the first product upgrade. Refer to the **Axiom 2020.3.1 Release Notes** and **Axiom Healthcare Suite 2020.3.1 Release Notes** for considerations before upgrading.

When upgrading to the 2020.3.1 version of Axiom Budgeting and Performance Reporting, keep in mind the following:

- Along with upgrading to Axiom 2020.3, you will also need to upgrade to Axiom Comparative Analytics 2020.3.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- This product upgrade contains updated templates, calculation methods, 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.

Preparing and scheduling upgrades

Summary of the upgrade process:

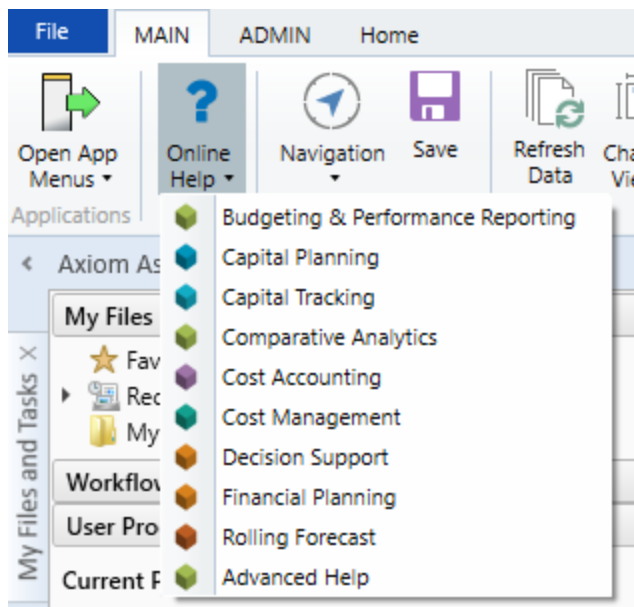
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a [support ticket](#) to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
 - Desired Axiom 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

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

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

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



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



Syntellis Central

[Syntellis Central](#) provides centralized self-service content and resources for the Axiom Budgeting and Performance Reporting platform and suite of products. Using Syntellis Central, you can:

- Search help across all Axiom products
- Access tips, tricks, and best practices in our knowledge base

- Find training & certification content including on-demand, video, webinars, labs, and instructor-led courses
- Submit a support issue, find suggested content, and manage any outstanding issues directly with us
- Review open Software Service project status and details

Issues fixed in 2020.3

The following tables list the resolutions for issues addressed in 2020.3, released on October 12th, 2020:

Driver, template, calc method, and other updates

Calc Methods

Issue	Description
PFB-08948 - FIF: Provider Comp % Collections/Gross CM [TFS 49516]	<p>Issue: In the ProviderComp tab, when using the Percent of Gross or Percent of Collections salary methods, the match formula was not referencing the first two budget periods on the ProviderDetail tab. This was causing an incorrect salary computation.</p> <p>Resolution: Corrected by adjusting the formula in match formula range to include periods 1-2 on the ProviderDetail tab to calculate a monthly amount for the Percent of Gross and Percent of Collections rows of the ProviderComp tab.</p> <p>NOTE: You can find the settings in the Provider List driver. For more information, search for the "Budget Provider List" topic in the online help.</p>

File Groups

Issue	Description
PFB-09186 - Initiative tab duplicates [TFS 55196]	<p>Issue: The system generates duplicates of the Initiative tab after a recalculation.</p> <p>Resolution: Corrected by resetting the AQ order when plan files run through Scheduler.</p>

Templates

Issue	Description
PFB-08596 - Total line in KHA_Drill09JE.xlsx includes an incorrect Sum formula [TFS 46723]	<p>Issue: In KHA_Drill09JE.xlsx, the sum formula references the wrong AQ tag. As a result, when the drill populates, the Total line displays zero.</p> <p>Resolution: Corrected by moving the AQ tags to the next row.</p>

Issue	Description
PFB-08858 - Drill to Transaction subtotal rows do not populate in the Expense tab [TFS 48860]	<p>Issue: In KHA_Drill03Transaction.xlsx, the subtotal rows do not populate in the Drill to Transaction detail in the Expense tab.</p> <p>Resolution: Corrected by moving the AQ tag to allow the formula to capture records.</p>

Report updates

No issues were addressed in this release.

Manual configuration instructions and technical considerations

No manual configurations or technical considerations needed for this release.