

Release Notes

Axiom Budgeting and Forecasting
for Higher Education
Version 2021.1

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

Syntellis is pleased to announce the 2021.1 release of Axiom Budgeting and Forecasting for Higher Education. 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 Forecasting for Higher Education online help. On the help home page, simply click the Release Notes link at the top of the page.

New features in 2021.1

Axiom Budgeting and Forecasting for Higher Education 2021.1 delivers expanded innovations including the following new features:

[Drill-down dialog in the Budget tab](#)

Drill-down to transaction-level data directly from your budget to see how individual transactions within an account affect your overall budget.

[Set budget drivers at the account level](#)

Setting drivers at the account level gives you granular control of budget calculations.

[Report center](#)

Easily access all of your reports using a centralized hub in the Web Client.

Drill-down dialog in the Budget tab

► Why use this feature

Drill-down to transaction-level data directly from your budget to see how individual transactions within an account affect your overall budget.

► How this feature works

What: Quickly view transaction-level data directly from your budget.

Where: The Budget tab of your budget.

Who: This feature is available to anyone with access to budget plan files.

How: In the Budget tab of your budget, click any blue account name.

Budgeting						
01 101100						
PVD A&S-DEANS-GENERAL Budget						
OVERVIEW	BUDGET*	TRANSFERS	FUND REVIEW	CONSOLIDATED SUMMARY	NARRATIVES	
Default - System Default Proposed Budget: \$2,170,172		2017 Actual \$20,102,610		2018 Budget \$30,555,112		▲ Propose (\$17,932,439)
Budget Group	Budget Method	Actual 2016	Actual 2017	Actual Nov YTD FY2018	Budget 2018	
▶ Required Fees		0	0	0	0	
+ Insert Budget Group						
Total Revenue		(24,738,306)	31,983,238	10,357,570	32,265,222	
▶ Personnel Expense JR						
▶ Benefits Other Than Pension		1,696,792	1,700,768	718,913	890,737	
▶ Faculty Salaries		0	0	0	0	
▼ Salaries & Wages		8,677,953	9,013,738	422,018	646,575	
500101 - STAFF WAGES	From Labor	752,284	928,492	360,172	480,067	
500102 - FACULTY WAGES	From Labor	7,647,722	7,805,346	0	0	
Q 500103 - OVERLOADS J&W FACULTY	Input Adjustment	13,729	15,638	0	0	
Q 500104 - OVERLOADS ADJUNCT	Input Adjustment	50,989	63,383	0	81,727	
Q 500105 - MISC WAGES,STIPENDS	Input Monthly	212,857	200,177	61,845	42,926	
Q 500106 - OVERTIME	Input Adjustment	371	702	0	41,855	
+ Add Salaries & Wages						

► Where to find more information

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

- "Using the Budget tab"

Set budget drivers at the account level

► Why use this feature

Drivers establish baseline inflation/deflation percentage calculations for budget planning in Axiom Budgeting. Previous versions established budget drivers at the budget group level. Setting drivers at the account level gives you granular control of budget calculations.

► How this feature works

What: Easily change a project to a funding source project type by selecting this option in the Project Approval report. After saving the report, the system automatically updates the Status field in the plan file in the Project tab > Description tab.

Where: This change applies to the **Drivers** tab in the **Administration** area of Axiom Budgeting and Forecasting.

Who: Only Axiom Budgeting administrators can establish drivers for a budget.

How: In the **Navigation** menu, click **Administration**. In the **Administration** area, click **Budgeting Settings > Drivers**. Click any blue cell to enter a value. When typing a percentage, express the value as a decimal. For example, type .03 for 3%. To make bulk updates or use formulas, click the **Edit in Spreadsheet** button in the upper-right. This allows you to use an Excel-like interface to update the drivers.

Budgeting

☰ ☰ ☰ ☰

Budgeting 2019 Working FG - Budget Settings

GENERAL	SPREADS	TARGETS	DRIVERS	NARRATIVES	
---------	---------	---------	---------	------------	--

Category Drivers	Inflation/(Deflation) Factor			Comments	
	FY 2019	FY 2020	FY 2021		
Revenues					
Revenue					
Grants Income					
471100 - GOVT FUNDS SEOG	3%	3%	3%		
471200 - WORK STUDY PROG	3%	3%	3%		
472000 - GRANT INCOME	3%	3%	3%		
473000 - FED PROG ACA	3%	3%	3%		
Tuition Income					
411100 - TUITION	5%	0%	0%		

Life In Mind

► Where to find more information

The following topic(s) in the online help have been added or updated with information and instructions for using this feature:

- "Defining global budget settings"

Report center

► Why use this feature

Easily access all of your reports using a centralized hub in the Web Client. This feature offers an intuitive configuration of report titles, column properties, and grid properties. Report viewers can explore data in the web reports using features such as filtering, sorting, drilling, and exporting to PDF or Excel.

NOTE: Axiom Budgeting 2021.1 users cannot create reports in the Report Center. This function will be available in a future release.

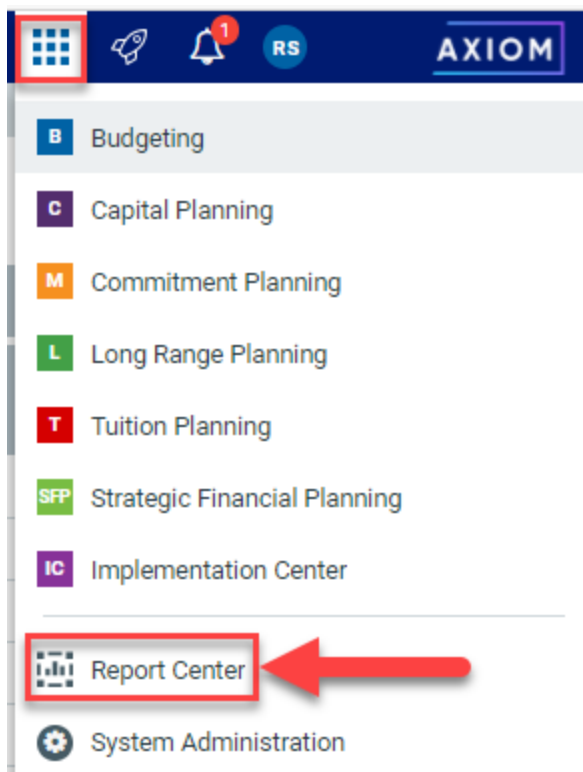
► How this feature works

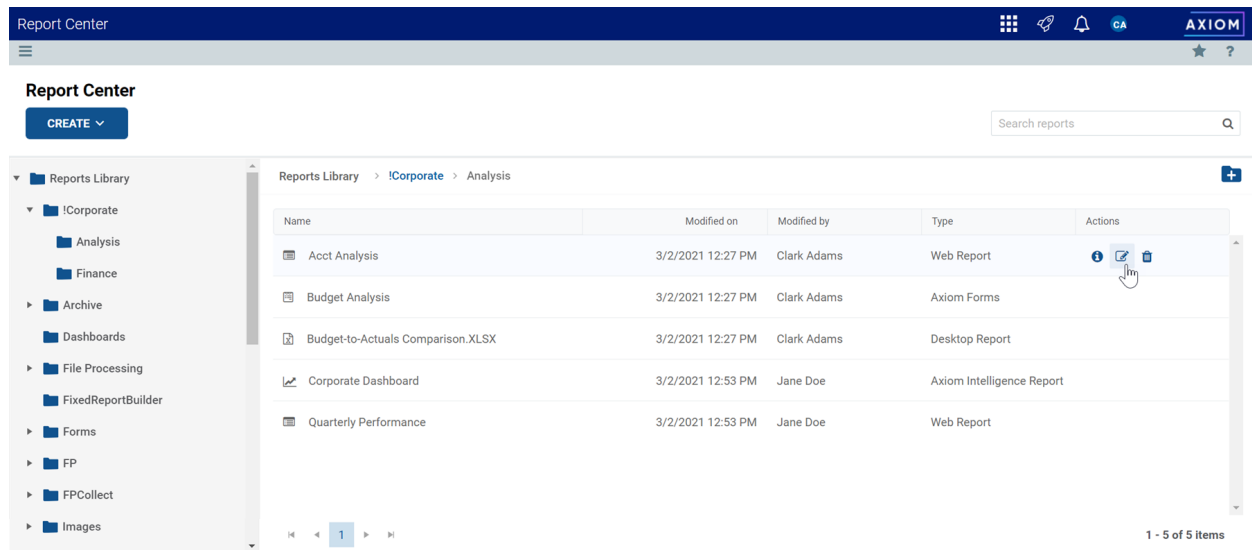
What: Create, browse, view, manage, and edit reports in a centralized location.

Where: Access the Report Center from the App Launcher.

Who: Any user with a security role that allows access to view or create reports.

How: Click **App Launcher** > **Report Center**.





► Where to find more information

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

- "Report center"

What to know before upgrading

IMPORTANT: You must apply the Axiom 2021.1 upgrade before applying any 2021.1 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2021.1 before the first product upgrade. Refer to the **Axiom 2021.1 Release Notes** for considerations before upgrading.

When upgrading to the 2021.1 version of Axiom Budgeting and Forecasting for Higher Education, 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.

Preparing and scheduling upgrades

Summary of the upgrade process:

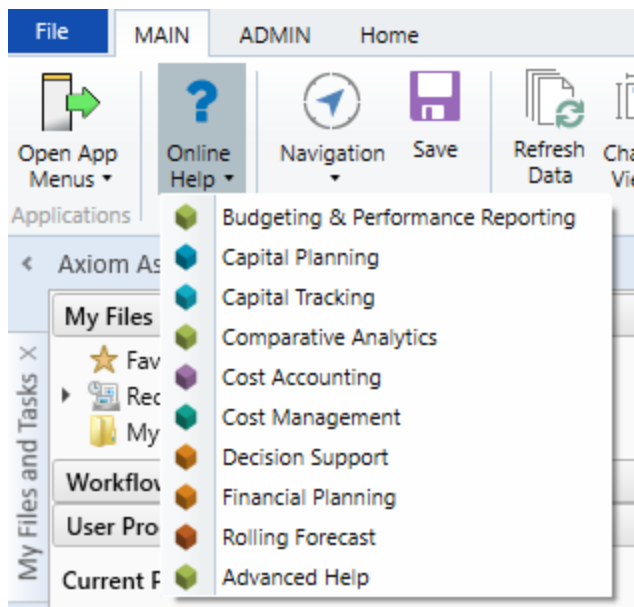
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a [support ticket](#) to schedule an 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

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:

- **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 Forecasting for Higher Education 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 coursesSubmit a support issue, find suggested content, and manage any outstanding issues directly with usReview open Software Service project status and details