

Release Notes

Axiom Budgeting and
Performance Reporting
Version 2021.2

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 2021.2 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 features in 2021.2

Axiom Budgeting and Performance Reporting includes the following new feature in this release:

Configure FTE scale

Easily configure Full Time Equivalent salary scale(s) based on your organization's unique needs. In addition to the standard 2080 and 2086 options, you can now configure FTE scales based on hours worked per day, week, month, or year.

Configurable FTE scale

► Why use this feature

You can now configure custom FTE scales used in the planning and reporting for your organization.

► How this feature works

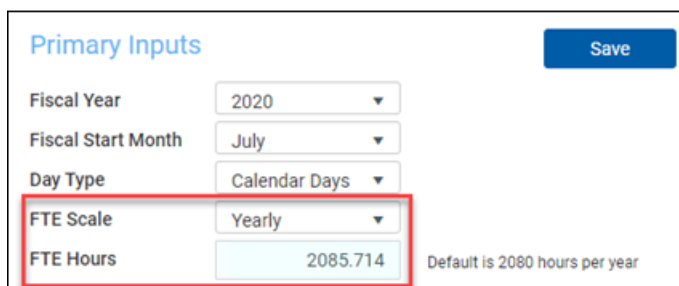
What: The Year Period table now allows administrators to configure custom FTE hours for an FTE scale.

Where: There are two primary locations where this feature is controlled.

- Axiom Management Reporting - Mgmt Admin task pane > Data Maintenance > Update Year and Period Tables
- Axiom Budgeting - Bud Admin task pane > 02 Budget Labor Config driver > Global Setup section

Who: Users must be assigned the Budgeting and Performance Reporting Admin role.

How: In the Year Period table, enter custom hours in the FTE Hours field. The custom FTE scale becomes the Default selection in the Global Setup section of the Budget Labor Configuration driver.



Primary Inputs		Save
Fiscal Year	2020	
Fiscal Start Month	July	
Day Type	Calendar Days	
FTE Scale	Yearly	
FTE Hours	2085.714	Default is 2080 hours per year

Example of the custom FTE hours input by scale type in the Year Period tab

► Where to find more information

What to know before upgrading

IMPORTANT: You must apply the Axiom 2021.2 upgrade before applying any 2021.2 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2021.2 before the first product upgrade. Refer to the **Axiom 2021.2 Release Notes** and **Axiom Healthcare Suite 2021.2 Release Notes** for considerations before upgrading.

When upgrading, keep in mind the following:

- Along with upgrading to Axiom 2021.2, you will also need to upgrade to Axiom Comparative Analytics 2021.2.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- This product upgrade contains updated templates, calculation methods, and remediated defects.
- 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:

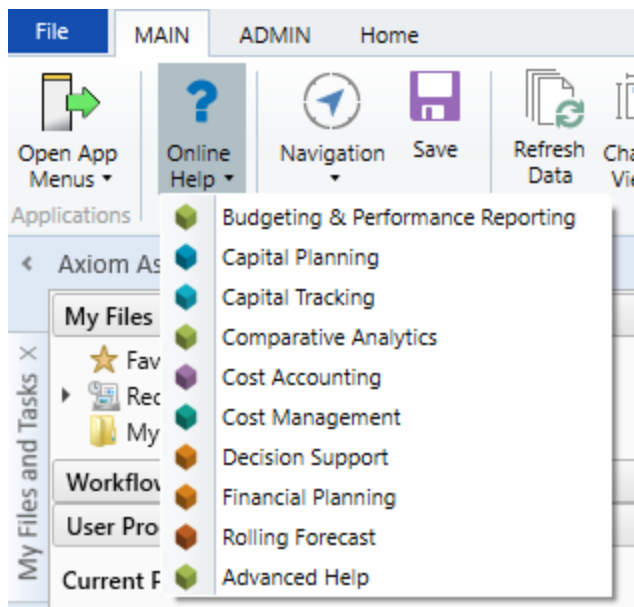
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a [support ticket](#) to schedule an 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 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 2021.2

The following tables list the resolutions for issues addressed in 2021.2, released on August 16th, 2021:

Driver, template, calc method, and other updates

Data Management

Issue	Description
Hybrid Index Scheme for data tables [TFS 87710]	Issue: Users need faster imports and reports. Resolution: Corrected by updating the table structure > Index Scheme > Hybrid, preserved auditing, and checked tables, resulting in increased importing and reporting speeds.

Templates

Issue	Description
Employee Labor tab displays zero start rate for new full-time employee with no prior history [PFB 06803] [TFS 30894]	Issue: When the user adds a new full-time equivalent without prior history, the system does not calculate the salary and does not return a result of "0.00". Resolution: Corrected by updating the code to reference the rate on the Regular and Program Additions rows instead of only the Program Additions row. The system can now properly calculate salaries for full time employees with no prior history.
Duplicated information created in Initiative tab [PFB 09186] [TFS 55632]	Issue: When a user adds information to the Initiative tab, the system created a duplicate of that information in another system area because of a difference in coding between FS Detail and Init Type. Resolution: Corrected by updating the code so that the information added into the Initiative tab is created and saved to one area only, not two.

Issue	Description
Employee tab EPTO AllocRate error when FTE is 0 [PFB 09257] [TFS 57383]	<p>Issue: When a user changes a full-time equivalent to 0.00 on the Employee tab, the system multiplied by the employee's earned points by their annual hours (which the user changed to zero). This resulted in a division by zero error.</p> <p>Resolution: Corrected by updating the formula in Column L to reference the correct cells. The user can now change an FTE to 0 on the Employee tab without invoking an error.</p>
Add New Jobcode driver values are not refreshing when the workbook is reopened [PFB 09300] [TFS 62808]	<p>Issue: When a user adds a new job code without ACT_PAY27 history with exceptions or changes to the hours account and or the salary account, the AQ7 column did not recognize that changes were made.</p> <p>Resolution: Corrected by updating a record into the AQ column to ensure the system saves the data.</p>
No option to edit details when adding a new provider with no pay27 data in the ProviderComp Tab [PFB 09302] [TFS 62991]	<p>Issue: When a user adds a new provider without any prior payroll history in the budget plan file > Provider Comp tab, then tries to edit the details for that provider, they cannot view or edit the details.</p> <p>Resolution: Corrected the New Provider utility by adding a new line in the Pay27 table so that users can now add a new provider without any prior history and view or edit the provider's details.</p>
Invalid paytype (0) error occurring in the Initiative tab[TFS 87959]	<p>Issue: An Invalid paytype (0) error occurs when a user saves their work in the Initiative tab when there is no budget group set up in Labor Configuration driver.</p> <p>Resolution: Corrected by updating the plan file to default to Global in the event that there is no budget group setup in the Labor Configuration driver. As a result, the system no longer displays an error.</p>
Red flag comments required error for the Budget Hide Salaries role [[T3] Case Number 00421831] [TFS 93000]	<p>Issue: Users with the Hide Salaries role received a red flag error (Unable to save changes due to red flag comment required) and could not save their changes after editing a department where a salary account required a comment in order to save.</p> <p>Resolution: Corrected by updating logic for the Hide Salaries role.</p>

File Groups

Issue	Description
Employee Labor tab would only allow a JobCode or Employee block to be added to the original plan file department number [TFS 81585]	<p>Issue: When two departments are associated with a plan file, the system only displays the department that the plan file was built on. When a user adds a new job code associated with the other department (the one that the plan file was not built on), the system does not display it as a choice in the Employee tab.</p> <p>Resolution: Corrected by adding new calculation method variables so that the user can now view and select all available departments in the Employee tab.</p>
Value of zero being calculated for the percent of salaries calc methods - preliminary budget calculation [PFB 09495] [TFS 84072]	<p>Issue: The system calculates a value of zero because the percent of salaries calculation method for the preliminary budget column is missing a lookup value to associate to salaries.</p> <p>Resolution: Corrected by updating the calculation method so that the system is now able to accurately calculate percentages of salaries in the preliminary budget.</p>
Summary hide tag is referencing the incorrect row [TFS 84116]	<p>Issue: When a user uses the GetData to determine what columns to show on the Summary tab, the system returns a blank cell and defaults to "SummaryHideTag".</p> <p>Resolution: This issue has been corrected.</p>

Report updates

Dashboards

Issue	Description
Month End Review Drill on Employee shows Total and not the drilled Jobcode [TFS 83439]	<p>Issue: When a user drills down to the Employee level, after having drilled on a job code, the system returns values for the total, not what the user has drilled down to view.</p> <p>Resolution: Corrected by updating the formula to fix this issue.</p>

Monthly reports

Issue	Description
Balance Sheet Detail Report HideRow logic is incorrect - The current formula will hide any rows where prior year and current year balance sheet accounts net to zero [TFS 95134]	<p>Issue: The Balance Sheet Detail report includes a formula that hides accounts incorrectly. The current formula will hide any rows where prior year and current year balance sheet accounts net to zero.</p> <p>For example, if the user pays a debt in full in the current year, the balance from the prior year may not be visible.</p> <p>Resolution: Corrected by updating the formula to fix this issue.</p>

Variance comments

Issue	Description
Threshold Analysis Report [TFS 96208] [Case Number 00429886]	<p>Issue: When a user tries to view the Threshold Analysis Report across fiscal years the report headers do not display dates correctly.</p> <p>Resolution: Corrected by updating the logic for the Month-Year, Current Year, and Leap Year.</p>

Manual configuration instructions and technical considerations

There are no manual configuration instructions or technical considerations for this release.