

Release Notes

Axiom Budgeting and Forecasting
for Higher Education
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 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 2021.2

Axiom Budgeting and Forecasting for Higher Education 2021.2 delivers expanded innovations including the following new features:

[Process task management](#)

Axiom Budgeting allows you to view and complete process tasks for budget approval in the web client.

[Drill-down to General Ledger forecasting transactions](#)

The Forecasting budgets now include a drill-through feature that allows you to easily access historical and year-to-date General Ledger transaction data associated with an account.

[Drill-down to General Ledger labor transactions](#)

You can now drill-down to view year-to-date General Ledger transaction detail for accounts using a "From Labor" calc method in the Budgeting plan files.

Process task management

► Why use this feature

Axiom Budgeting allows you to view and complete process tasks for budget approval in the web client. This feature is available to all budgets in the Budgeting and Labor Planning tabs. Depending on your security settings, you can submit, reject, and advance the process for planning a budget using this feature.

► How this feature works

What: Conduct the budget planning approval process in a central location from the web client.

Where: From the Budgeting or Labor Planning tabs.

Who: Any user with a security role that allows access to process tasks.

How: Click the Open Process Tasks hyperlink.

It's that time of the year again...please review your budgets below and provide inputs as indicated in the plan files.

BUDGETING

LABOR PLANNING

BUDGET REQUESTS

FORECASTING

Budget		2017 Actual	2018 Budget	2019 Proposed	Variance \$	Variance %	Step				Status
PVD A&S-DEANS-GENERAL		\$28,796,823	\$1,852,432	\$1,106,197	\$746,235	40.3%	1	2	3	4	Budget Input
PVD A&S-ENGLISH		\$899,365	\$10,437,836	\$11,629,667	(\$1,191,831)	(11.4%)	1	2	3	4	Budget Approval
PVD A&S-CRIMINAL JUSTICE		\$89,257	\$113,673	\$185,363	(\$71,690)	(63.1%)	1	2	3	4	Budget Office Approval
PVD A&S-SOCIAL SCIENCES		\$535,708	\$452,286	\$971,743	(\$519,458)	(114.9%)	1	2	3	4	Budget Review
PVD A&S-SCIENCE		\$280,435	\$415,021	\$591,045	(\$176,024)	(42.4%)	1	2	3	4	Budget Review
PVD A&S-MATH		\$397,996	\$394,816	\$1,023,579	(\$628,763)	(159.3%)	1	2	3	4	Budget Input
PVD A&S-HUMANITIES		\$605,024	\$430,996	\$433,406	(\$2,409)	(0.6%)	1	2	3	4	Budget Input
PVD A&S-UNIVERSITY		\$1,001	\$77,778	\$74,759	\$3,019	3.0%	1	2	3	4	Budget Input

2018 Year-to-Date

Actual Expenses

Budget Expenses

Variance \$

Variance %

Announcements

BUDGET CYCLE

7/19 Budget Submission

IMPORTANT DATES

7/01 Staff Salary Data Available

6/24 Non-Salary Go-Live

GENERAL

6/17 Refresher Training

12/04 2019 Budget Cycle

Process Steps

(NO DUE DATE)

(NO DUE DATE)

(NO DUE DATE)

(NO DUE DATE)

Open Process Tasks

1 Budget Input

2 Budget Review

3 Budget Approval

4 Budget Office Approval

Budgeting							
Budget Planning Process 2019							
View: All							
Process Status: Active							
Actions	PLANFILE	Description	Current Step	Due Date	Step Owner	Status Details	Process State
	d01_d101100	PVD A&S-DEANS-GENERAL	1 - Budget Input	(no due date)	Inputter Budget (bi)	Active 51 days	Active
	d01_d101200	PVD A&S-ENGLISH	1 - Budget Input	(no due date)	approver budget (ba)	Active 51 days	Active
	d01_d101250	PVD A&S-CRIMINAL JUSTICE	1 - Budget Input	(no due date)	Roger Strother (rstrother)	Active 51 days	Active
	d01_d101300	PVD A&S-SOCIAL SCIENCES	1 - Budget Input	(no due date)	Joshua Russell (jussell)	Active 51 days	Active
	d01_d101400	PVD A&S-SCIENCE	1 - Budget Input	(no due date)	Andrew Herr (aherr)	Active 51 days	Active
	d01_d101500	PVD A&S-MATH	1 - Budget Input	(no due date)	Andrew Herr (aherr)	Active 51 days	Active
	d01_d101600	PVD A&S-HUMANITIES	1 - Budget Input	(no due date)	Andrew Herr (aherr)	Active 51 days	Active

► 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:

- "Opening process tasks"
- "Managing your process tasks"
- "Viewing process routing details"

Drill-down to General Ledger forecasting transactions

► Why use this feature

The Forecasting budgets now include a drill-through feature that allows you to easily access historical and year-to-date General Ledger transaction data associated with an account. You can drill-through to the General Ledger data for any account that uses a Forecast planning method.

► How this feature works

What: Drill-down into general ledger data for an account.

Where: In each Budget Group found on the Forecast tab of the Forecasting budget plan file.

Who: Any user with a security role that allows access to Forecasting budgets.

How: Click the account name identified by a blue hyperlink and magnifying glass icon.

01 | 101100

PVD | A&S-DEANS-GENERAL | April FY2019 Forecast

OVERVIEW	FORECAST*	CONSOLIDATED SUMMARY
Default - System Default Proposed Forecast: \$2,515,618		April YTD FY2019 Actual \$217,295
Budget Group	Forecast Method	
► Personnel Expense JR		
▼ Benefits Other Than Pension		
Q 502001 - FICA-ADMIN	Forecast Adjustment	
Adjustment \$	Forecast Adjustment	
Total	Forecast Adjustment	

► 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 Forecasting budget"

Drill-down to General Ledger labor transactions

► Why use this feature

You can now drill-down to view year-to-date General Ledger transaction detail for accounts using a "From Labor" calc method in the Budgeting plan files. This enhancement allows you to view General Ledger transactions for Labor Roster, Pooled Labor, and Other Labor categories. The GL Transaction Drill that

opens when clicking an account displays these categories as a separate tabs. The data displayed in these tabs depends on the planning dimensions selected for your budget and your security permissions to access labor data.

► How this feature works

What: Drill-down into general ledger labor data for an account.

Where: In Budget tab of the budgeting plan file.

Who: Any Budgeting user with security roles that allow them to view labor data.

How: Click an account name identified by a blue hyperlink and magnifying glass icon. The value in the **Budget Method** column must be "From Labor" because the account must use a labor calc method.

Budget Group	Budget Method
Personnel Expense JR	
► Benefits Other Than Pension	
► Faculty Salaries	
► Salaries & Wages	
▼ Salaries and Wages	
Q 6000 - Salaries and Wages	From Labor
+ Add Salaries and Wages	

GL Transaction Drill

GL2016	GL2017	GL2018 YTD	LABOR ROSTER 2019	POOLED LABOR 2019	OTHER LABOR 2019
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Labor Roster 2019 Detail, Acct = 6000 - Salaries and Wages

Employee	Position	Mar	Apr	May	Jun	Jul	Aug
E0000001 - Angie Barnett	F000001 - Adjunct Assistant Professor	20,833	20,833	20,833	20,833	20,833	20,833
N2019d01_d10110054643 - abc	NP2019d01_d10110027731 - Test Save	-	-	-	-	-	-
		20,833	20,833	20,833	20,833	20,833	20,833

► 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"

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** for considerations before upgrading.

When upgrading to the 2021.2 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 Higher Education 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. 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 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 table lists the resolutions for issues addressed in 2021.2, released on August 2, 2021:

Issue	Description
Edit in Spreadsheet button on Drivers tab does not look like the same button elsewhere [TFS 79194]	Summary: The Edit in Spreadsheet button did not have a consistent look across all tabs. Resolution: Corrected by changing the color scheme to the Edit in Spreadsheet button on the Drivers tab.
Forecasting: only current proposed budget data is displaying in Previous Forecast column [TFS 73832]	Summary: In the Forecast tab of a Forecast budget, the Previous Forecast column should equal "0" in all rows when the Forecast is seeded from a budget. Resolution: Corrected by updating the column so that it displays as expected when forecast is seeded from a budget.
PFB-09496: Save function is available when it should not be [TFS 82670]	Summary: The Save button in the Select a Fund dialog is enabled, even when the current user should not be able to save based on their role and/or stage of the workflow process. Resolution: Corrected by updating background security processes.
PFB-09524: Web Template - Contra-Revenue Issue [TFS 85158]	Summary: "Contra-revenues" is not calculating correctly in the Budget_Plan_Web template. Resolution: Corrected by updating the template to correctly calculate in contra-revenues.
PFB-09515: Issue with Process Management Reporting on Home Page [TFS 83734]	Summary: On the Budget Home Page, the text of the Process Steps is hard coded and doesn't update to reflect the step names for Labor and Forecasting, instead displaying the budgeting process steps. Resolution: Corrected by updating the home page to display StepNames for process steps 1-4 instead of being hard coded to budgeting steps.
Labor: [Position Planning/Hide Column] - Error when attempting to hide "Merit" column [TFS 100229]	Summary: In Labor Planning, if the user attempts to hide the Merit column they will receive an error message when loading the Position Planning tab. Resolution: Corrected by adjusting Merit column width so that it is not visible to users. This is a temporary workaround until the underlying platform issue can be resolved in a future release.

Issue	Description
BUD: Base Budget starting point is including one-time budget requests [TFS 96747]	<p>Summary: If the user has budget requests enabled, then the PY Budget column on the Budget tab includes One Time & Recurring budget requests. However, the starting point for the budget should ONLY include recurring budget requests.</p> <p>Resolution: Corrected by updating code for Budget Request and Budgeting file groups. Note that after entering a Budget Request, the Budgeting plan file must be saved before checking the Summary Drill or Central Adjustment Utility.</p>
FCST: Consolidated Summary/Drill for Salaries & Wages on the is not pulling all accounts [TFS 101197]	<p>Summary: The Forecasting Consolidated Summary is not pulling in all accounts set with 'BudgetGroup = Salaries & Wages.'</p> <p>Resolution:Corrected by updating table properties.</p>