

## **Release Notes**

Axiom Budgeting and  
Performance Reporting  
Version 2021.3

**AXIOM**

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Version: 2021.3.11

Updated: 3/27/2023

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# About the Release Notes

Syntellis is pleased to announce the 2021.3 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.

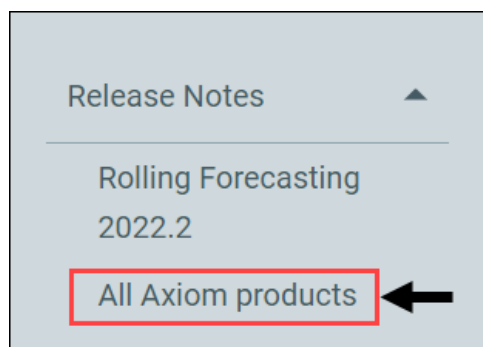
The purpose of these release notes is to provide you with the following:

- 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, click the Release Notes link at the top of the page.

## ► Accessing current and older release notes for Axiom Healthcare products

The online help for Axiom Healthcare products 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 at the top of the menu on the left side of the page, click **Release notes > All Axiom products**.



# New features in 2021.3

There are no new enhancements for Axiom Budgeting and Performance Reporting in this release.

# What to know before upgrading

**IMPORTANT:** You must apply the Axiom 2021.3 upgrade before applying any 2021.3 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2021.3 before the first product upgrade. Refer to the **Axiom 2021.3 Release Notes** and **Axiom Healthcare Suite 2021.3 Release Notes** for considerations before upgrading.

When upgrading to the 2021.3 version of Axiom Budgeting and Performance Reporting, note the following:

- Along with upgrading to Axiom 2021.3, you must upgrade to Axiom Comparative Analytics 2021.3.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- You can replace Syntellis reports. Any report that you created or saved under a different name remains unchanged. Revised reports are available in Document History.
- Any Syntellis report that was moved to a new location is automatically moved back to its original location.
- Syntellis product templates and calculation method libraries are replaced.
- Product task panes are replaced.
- Process definitions are not replaced.
- Driver files are replaced.
- Security roles and subsystems are reset to their configured settings. Your user security exceptions remain intact.
- Specific items that are configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, remain unchanged. Any required modifications to these areas are covered in the release notes.

# Preparing and scheduling upgrades

Summary of the upgrade process:

1. **Review product release notes** – Review this document to become familiar with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom System Administrator 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:
  - Axiom platform version
  - Axiom for Healthcare product and version
  - Whether to first refresh and apply updates to the Axiom test sandbox with a copy of the production instance of Axiom. If so, provide the earliest date that Syntellis can do this.
  - Propose an approximate two-hour downtime window when Syntellis can apply updates 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 to enable features for this version.

# Getting help and training

Syntellis provides world-class resources 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 opens only for products you are licensed to use.

- **Contextual help** – Form/web-enabled features and products include contextual help directly within the user interface. This information provides a quick summary and instructions specifically related to the page you are using. You can access this information by clicking the question mark in the upper right corner of the page. 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 and 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 Support.
- Review open Software Service project status and details.



# Issues fixed in 2021.3

This table includes template, plan file, and driver updates.

The following table lists the resolutions for issues addressed in 2021.3, released on February 21, 2022:

## Templates

Issue	Description
New FTEs not flowing to Provider Detail from Provider Comp [100351]	<p><b>Summary:</b> When an FTE Was not present in month 1 on the Provider Comp tab, the FTE did not flow to the Provider Detail tab.</p> <p><b>Resolution:</b> Adjusted the ProviderDetail column formula AN to reference ProviderComp Total FTEs column AE and fixing a workflow issue to ensure that ProviderDetail and ProviderComp are in sync.</p>
Incorrect HRAcct being brought in from AQ9 [PFB-08238] [40716]	<p><b>Summary:</b> When users tried to access records in the paytype table that rolled up to the same jobcode but had different HrAccts, the incorrect child account was displayed in the plan file (jobcode sheet) from AQ9.</p> <p><b>Resolution:</b> Removed field definitions to improve intended functionality.</p>
Add ROUND() to column FC in JOBCODE block calc method [PFB-08488] [43790]	<p><b>Summary:</b> When users wanted to net to zero for the total, decimal values in columns EQ:FB did not fully zero out the total, which left a small decimal result in the Total column (FC). This value was used as a denominator in other formulas, which resulted in large numbers rather than zero.</p> <p><b>Resolution:</b> Implemented round logic to four digits in column FC for the corresponding line references related to hours calculations.</p>
Jobcode variable/fixed picklist value not updating the header row [T3 PFB-09146] [66581]	<p><b>Summary:</b> When users changed the drop-down for a Jobcode from fixed to variable or vice versa, the gray row indicating whether the field was fixed or variable did not change along with it, and users could not determine which Jobcode was used in the plan file.</p> <p><b>Resolution:</b> Adjusted the logic and references to a single location, which keeps the two displayed values in sync.</p>

## File Groups

Issue	Description
Employee tab EMPID save error [PFB 09511] [83936]	<p><b>Summary:</b> Users with lengthy department numbers encountered a save error in the Employee tab of the budget plan files because the default new employee ID changed to scientific mode after users rebuilt and reprocessed their data.</p> <p><b>Resolution:</b> Established alternative logic to determine the employee ID.</p>
[Debt] Reorder columns BUD prototype table [109323]	<p><b>Summary:</b> The columns in the BUDyyyy were out of order.</p> <p><b>Resolution:</b> Adjusted the table order to correct the issue.</p>
(2021.3) [T3] Case Number 00445913 - Budget Master Template - Employee tab #Div error [121164]	<p><b>Summary:</b> On the Employee tab of the Budget template, the Job Code calc method required error handling for divide by zero. If the budget was zero, errors occurred in multiple cells.</p> <p><b>Resolution:</b> Updated the calc method formula to manage divide by zero.</p>
(2021.3) [T3] Case Number 00448424 - Provider Comp Tab FY Budget Dollars results in 0 due to incorrect reference to AE12 in Add New Provider CML [121165]	<p><b>Summary:</b> The ProviderComp and Add New Provider calc method references to the related table field did not match. This issue caused inconsistent results, depending on whether the provider was added manually after the related file group was rebuilt.</p> <p><b>Resolution:</b> Updated both calc methods to produce similar references.</p>

## Drivers

Issue	Description
Users unable to add extension to a column for Driver 18 and 19 [102715]	<p><b>Summary:</b> Users encountered an error with driver 18 when they tried to add an extension to a column. because the corresponding table property was set to False. This issue also caused an error with driver 19.</p> <p><b>Resolution:</b> Adjusted the table properties to allow client extensions.</p>

# Issues fixed in 2021.3.4

The following table lists the resolutions for issues addressed in 2021.3.4, released on May 23, 2022:

## File Groups

Issue	Description
(2021.3.4) [T3] Case Number 00467397 - Hours not coming over to Expense tab in plan file until another recalc [140335]	<p><b>Summary:</b> Budgeted hours did not populate the Expense tab when plan files were initially processed. When processed a second time, the budgeted hours do populate.</p> <p><b>Resolution:</b> Adjusted the responsible Axiom query so that data populates correctly with the first processing.</p>

# Issues fixed in 2021.3.5

The following table lists the resolutions for issues addressed in 2021.3.5, released on June 20, 2022:

## File Groups

Issue	Description
(2021.3.5) [T3] Case Number 00465927 - Initiative values on Summary tab differ after saving initiative tab versus saving main plan file [143585]	<p><b>Summary:</b> In the Budget plan file group, the revenue accounts in the New Initiatives column changed depending on whether users saved the Initiatives tab or the main plan file. Neither one displayed correct amounts because the initiatives in the plan file displayed a net effect to Revenue of \$0.</p> <p><b>Resolution:</b> Removed the InitiativeID from cell CF13 in the Stat_Rev tab so that data from prior years can come in.</p>

## Report updates

No client-facing issues were addressed in this release.

# Issues fixed in 2021.3.6

The following table lists the resolutions for issues addressed in 2021.3.6, released on July 18, 2022:

## Report updates

Issue	Description
(2021.3 Patch 6) Performance Reporting Security Update removes permissions granted to other roles and subsystems (136570) [142764]	<p><b>Summary:</b> In the Performance Reporting Security Update utility, when administrators added users that belonged to other subsystems, those users' memberships in other roles and subsystems were removed, and only newly added permissions for Management Reporting were retained.</p> <p><b>Resolution:</b> Enhanced the utility to allow for better management of new users, existing users, and users without membership in the Management Reporting subsystem, such that memberships are retained where applicable. Refer to the online help topic "Managing Performance Reporting user security" for additional information.</p>

# Issues fixed in 2021.3.8

No client-facing issues were addressed in 2021.3.8, released on September 19, 2022.

# Issues fixed in 2021.3.11

No client-facing issues were addressed in 2021.3.11, released on March 31, 2023.

# Manual configuration instructions and technical considerations

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