Release Notes

Axiom Budgeting and
Performance Reporting
Version 2022.1

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2022.1 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, click the Release Notes link at the top of the page.

New features in 2022.1

While no new functionality has been added or enhanced in Axiom Financial Planning, it does deliver enhancements from Axiom Version 2022.1. For more information, see Axiom 2022.1 Release Notes.

What to know before upgrading

> **IMPORTANT:** You must apply the Axiom 2022.1 upgrade before applying any 2022.1 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2022.1 before the first product upgrade. Refer to the **Axiom 2022.1 Release Notes** and **Axiom Healthcare Suite 2022.1 Release Notes** for considerations before upgrading.

When upgrading to the 2022.1 version of Axiom Budgeting and Performance Reporting, note the following:

- Along with upgrading to Axiom 2022.1, you must upgrade to Axiom Comparative Analytics 2022.1.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- This product upgrade may contain updated templates, calculation methods, 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.
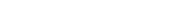
Getting help and training

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 2022.1

The following table lists the resolutions for issues addressed in 2022.1, released May 2022:

Issue	Description
PFB-09467 - JobCode tab reference to ADC tab [79579]	**Summary:** A formula reference in three rows of the JobCode tab (col DI, CM rows 19, 20, and 26) that pulls the total for allocation from the ADC tab referenced period 12 (column S) instead of the ADC total (Column T). **Resolution:** Updated the formulas to reference the ADC total instead of period 12.
PFB-09507 - Employee tab New Employee CY Proj [84682]	**Summary:** On the Employee tab of a Budget plan file, when a new employee was added to an existing job code block, the FTE was added to the current year and then to the budget year. However, when the FTE was not planned for hire until the budget year, and zero FTE remained for the current year, the remaining current year projected dollars allocated based on the budgeted average hourly rate. If only in the budget, the current year projection should not be impacted except for the existing employees' salaries. **Resolution:** Modified the formula so that the current year projection is not impacted when FTE is not planned for hire until the budget year.
PFB-09526 - Monthly RevUsage Reconciliation hide row doesn't include IPVol and IPRev columns [86622]	**Summary:** Rows in the Monthly RevUsage Reconciliation report were hidden even when non-zero values existed in the IPVol_Month1 and IPRev_Month1 columns. **Resolution:** Updated the row hide logic to include the IPVol_Month1 and IPRev_Month1 columns.
Formula and titles changes need to Executive Management Package. [98807]	**Summary:** On the Dept_Trend and BVRollup tabs of the Executive Monthly Package report, the months listed in the titles were wrong. Header formulas in the report had incorrect references. **Resolution:** On the Dept_Trend tab, the logic was adjusted to identify the period in the trend report table column on the Supporting Data tab for the Period table. For the BVRollup, the logic was adjusted to reference the period of the current year month for the range.

Issue	Description
[T3] Case Number 00441929 - Instructions tab reference "Yellow" cells but they are now blue Update DIM-CalDate & Update DIM-CalDate [110431]	**Summary:** On the Instructions sheet of the CalDate and GLPeriod assets, "Yellow" cells were referenced, but the cells are blue, which was misleading. **Resolution:** Updated the instructions sheet of the CalDate and GLPeriod assets to indicate blue cells instead of yellow.
[T3] Case Number 00431836 - Entity selection in Variance Review report does not filter results. [113977]	**Summary:** The Refresh Variable that was presented when refreshing the Variance Review report (Reports Library\Management Reporting\Variance Comments\Comment Review folder) included a field to select Entity. However, the Entity was not associated with the subsequent department selections, which results in incorrect results. **Resolution:** Associated Departments with the corresponding Entity selection so that the report is populated with the correct departmental data from the selected Entity.
[T3] Case Number 00439346 - Incorrect formula in Dollars columns (BA:BL) Employee calc method Empl_List tab (see TFS 54639) [114596]	**Summary:** A formula in the Employee calculation method on the Empl List tab was incorrect because of a previous change [54639] that was made to the Merit/Market increases. **Resolution:** Updated the formula conditions to ensure that the Dollars columns return the correct results.
(2022.1) [T3] Case Number 00442966 - Duplicate keys were found in the source data Initiatives tab [116207]	**Summary:** Duplicate initiatives appeared during recalculation even after being cleared. A message in the task log reads, "Duplicate keys were found in the source data." **Resolution:** Added diminishing list logic to each section to ensure that duplication is not created. If duplication happens, the workaround is to rebuild the plan file.
[T3] Case Number 00442505 - Provider Summary tab: Add New Provider Summary CM [116208]	**Summary:** The Total FTEs amount on the Provider Summary tab did not include providers with zero FTEs in the YTD FTE but had a non-zero FTE in the Next Year Budget. **Resolution:** Modified the formula to include all Provider FTEs even if a zero exists in the YTD FTEs.
(2022.1) [T3] Case Number 00445913 - Budget Master Template - Employee tab #Div error [116681]	**Summary:** A formula on the Employee tab of the budget template in the Job Code calculation method returned an error when the budget is zero. **Resolution:** Updated the formula to return a zero if the budget is zero.

Issue	Description
(2022.1) [T3] Case Number 00448424 - Provider Comp Tab FY Budget Dollars results in 0 due to incorrect reference to AE12 in Add New Provider CML [118718]	**Summary:** In some situations, after users created a new file group from the latest prototype, the Add New Provider calculation method referenced the wrong cell, resulting in the FY Budget Dollars equaling zero on the Provider Comp tab. **Resolution:** Changed the affected cell references for two calculation methods on the Provider Comp tab so that the formula returns the total instead of zero.
[T3] Case Number 00448406 - Dept Monthly Package: Per Unit Calculations [119859]	**Summary:** The per unit calculations used the units from the first column instead of the respective period and data table columns. **Resolution:** Updated the per unit formula to use the units from the respective period and data table columns.
PFB-09007 - Save error on Initiatives tab "cannot store nnn in column of type Integer" when initiative ID is longer than 15 [120828]	**Summary:** In certain instances, plan files with large department numbers generated errors while trying to save initiatives. The error message reads, "Cannot store nnn in column of type Integer." **Resolution:** Updated the formula so that any InitiativeID that is longer than 14 characters triggers an alternate save algorithm to ensure proper of large department numbers.
[T3] Case Number 00450858 - RE: Plan File Change Calc Method Issue [123129]	**Summary:** Plan File with Multiple Depts in KHABgt Map. If users changed a calculation method for a department other than the KHABgtCode, it changed the KHABgtMap to KHABgtCode. **Resolution:** When changing calculation methods, if the changed calculation method uses a formula for a field value that users intend to preserve, the formula overwrites the field value. Substituted the formulas for Dept in the calculation method to static zero. Now, if a calculation method permits the selection of a Dept, it stamps the value in the targeted cell. Otherwise, the formula is not required, and the field value is preserved. This change impacts Master template | Stat_Rev, Expense, (non-add new calculation methods) and each Labor tab for New Paytype to include Dept Other Pay section calculation methods.

Issue	Description
Provider Comp - Salary comp method does not calculate merit/market increase [123380]	**Summary:** Merit increases from the labor rates driver have nine levels of hierarchy, but only eight were included in the Provider Comp calculation. The final Global level with no qualifiers was missing. **Resolution:** Added the Global level with no qualifiers to the Provider Comp method calculation.
[T3] Case Number 00453052 - Dept Specific Forecast Adjustment [126049]	**Summary:** In the Dept Specific Forecast Adjustments Report tab, when users recomputed variable costs, the IP Revenue section used OP Revenue/Units and multiplied by the forecasted volume instead of IP Revenue/Units. **Resolution:** Updated the formula in AC6 to select IP Revenue instead of OP Revenue in the IP Revenue section.
[T3] Case Number 00456090 - We were expecting 26 pay periods for our 2021 year but dates for PP26 are blank [127290]	**Summary:** In specific situations, the payroll dates form did not contain the 26th pay period. This issue occurred when the first period scheduled payroll end date pushed the last period end date into the next fiscal year. **Resolution:** Updated the logic to ensure that a minimum of 26 bi-weekly pay periods is present even if the pay period spills into the next year and that fiscal month is capped at 12.
(2022.1) [T3] Case Number 00462421 - PFB: Performance Reporting Security Update Utility errors on open in stand along BP "invalid Tables/Columns" [135113]	**Summary:** An error was returned when using the Performance Reporting Security Update Utility during new client implementations for clients with no Providers. The formula pointed to the wrong cell when it attempted to resolve a Provider condition. **Resolution:** Updated the prior formula to reference the correct cell.

Issues fixed in 2022.1.1

The following table lists the resolutions for issues addressed in 2022.1.1, released June 20, 2022:

Drivers, templates, calc methods, and other non-reporting features

Issue Description	Description
(2022.1 Patch 1) Budget Template - Formula errors require revisions to intended description + reinstating missing formula references (142403) [142442]	**Summary:** In the Budget template Configuration tab, an updated Control_Sheet formula caused an error after certain variable references were removed. **Resolution:** Added the missing references back to the Control_Sheet formula.
(2022.1.1) [T3] Case Number 00465927 - Initiative values on Summary tab differ after saving initiative tab versus saving main plan file [143584]	**Summary:** 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. **Resolution:** Removed the InitiativeID from cell CF13 in the Stat_Rev tab so that data from prior years can come in.

Report updates (Performance Reporting)

Issue Description	Description
(2022.1 Patch 1) [T3] Case Number 00459812 - Inconsistent use of the ACCT.RptMap causing inconsistent results between the Managers Month End Dashboard and the Department Monthly Package [142010]	**Summary:** Statistics that were accurate in the Department Monthly Package were not accurate in the Managers Monthly Dashboard. This issue resulted from inconsistent use of fields not mapped by RPTMap (e.g., the Managers Monthly Dashboard included Acct.FSDetail in the Sum By statement, and the Department Monthly Package used Acct.RPTMap.FSDetail. **Resolution:** Updated the Managers Monthly Dashboard to use RPTMap mapping for data retrieval.

Issues fixed in 2022.1.2

The following table lists the resolutions for issues addressed in 2022.1.2, released July 18, 2022:

Drivers, templates, calc methods, and other non-reporting features

No client-facing issues were addressed in this release.

Report updates

Issue Description	Description
(2022.1 Patch 2) Performance Reporting Security Update removes permissions granted to other roles and subsystems (136570) [142763]	**Summary:** 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. **Resolution:** 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.

Issues fixed in 2022.1.4

No client-facing issues were addressed in 2022.1.4, released on September 19, 2022.

Issues fixed in 2022.1.8

No client-facing issues were addressed in 2022.1.8, released on March 31, 2023.

Manual configuration instructions and technical considerations

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