

Release Notes

Axiom Financial Planning

Version 2022.1

AXIOM

10 S. Wacker Dr
Suite 3375
Chicago, IL 60606
(847) 441-0022
www.syntellis.com
info@syntellis.com

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About the Release Notes

Syntellis is pleased to announce the 2022.1 release of Axiom Financial Planning. 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.

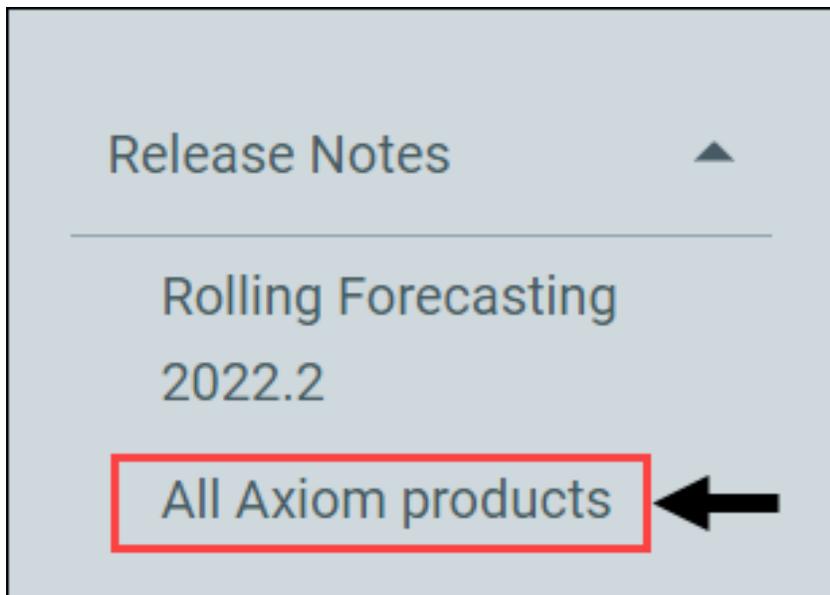
The purpose of these release notes is to provide you with the following:

- 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 Financial Planning 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

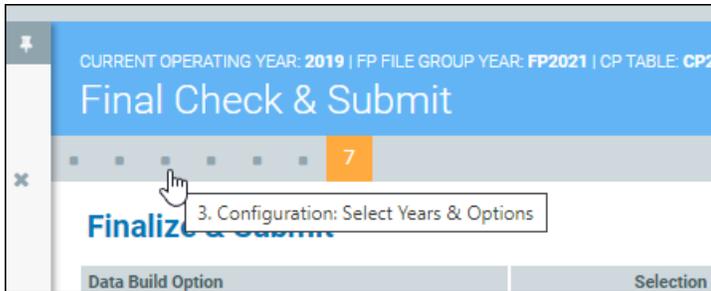
The online help for Axiom Healthcare products includes a page with links to current and past release notes for the last several years. To access this page, [open the product online help](#), and at the top of the menu on the left side of the page, click **Release notes > All Axiom products**.



New features in 2022.1

Axiom Financial Planning includes the following new enhancements in this release:

- **Updated Rating Agency Medians.** In certain reports, users can select the latest rating agency medians for comparison purposes.
- **Updated Transfer to Financial Planning utility.** Syntellis added page number tool tips to the Transfer to Financial Planning utility:



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 backwards 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 Financial Planning, keep in mind 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.
- Syntellis-delivered reports may be replaced. Any report that you created or saved under a different name remains untouched. Replaced reports are available in Document History, if needed.
- 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 sub systems are reset to their configured settings. All of 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 Financial Planning 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 on May 23, 2022:

Issue	Description
Node Defaults for variable expenses do not populate in plan files when Integrating into FP [60525]	<p>Summary: When users created nodes from integrated data, the node defaults for variable rates were not applied to the plan files.</p> <p>Resolution: Updated the code logic in the related calculation methods to reference the correct rows.</p>
Cap_Project plan files do not have the CPReqID carry over from file group to file group during Annual Roll Forward [100805]	<p>Summary: When users performed the Annual Rollforward using the Transfer Capital Projects to Financial Planning utility, a #Value error occurred because the value for the CPReqID was missing.</p> <p>Resolution: Added the CPReqID to the Axiom Query and the Save2DB section, from which it was missing.</p>
Transfer to FP year 2 is set to actuals in RF but may not be correct if the year is forecast [101652]	<p>Summary: In the Transfer to Financial Planning utility, the Year 2 source year can have data that is actuals, forecast, or both. However, the utility assumed the data is always actuals, which meant the data was incomplete if it included forecasts.</p> <p>Resolution: Updated the following:</p> <ul style="list-style-type: none">• Transferred to Financial Planning utility formula in the account verification sheet to filter the correct data; added three new variables representing the data for each source year instead of only actuals.• Transferred from Rolling Forecasting Monthly import job to bring in all relevant data instead of only actuals; three new source year variables were also added.• Transferred to Financial Planning job in Scheduler to incorporate new added variables.
Payors duplicated when payors inserted manually and re-integrated [105467]	<p>Summary: When users manually integrated data, built nodes, added payors, and populated data, the manually inserted payors were inserted again during the integration process.</p> <p>Resolution: Added a payor filter to the to the rebuild filter.</p>
Transfer to FP node type validation fails when using table values [113213]	<p>Summary: When using the Transfer to FP utility, if users selected the Node type to be set from the DEPT table, valid node types were displayed as not valid.</p> <p>Resolution: Adjusted the code so that the Axiom Query refreshes on open to pick up the node types.</p>

Issue	Description
Annual Rollforward - Data lost when Start Year > file group start year [115379]	<p>Summary: Three issues:</p> <ol style="list-style-type: none"> 1. When users performed the Annual Roll Forward, if the start year was greater than the file group year, the roll forward changed the start year to equal the file group year, which caused data from the original start year to be lost. 2. The start year was not displayed on the Node Selections page. 3. The settings in the Filter panel did not restrict the available nodes based on the selected model unless, between selections, the user opened the filter panel and clicked Apply. <p>Resolution: Corrected issues:</p> <ol style="list-style-type: none"> 1. Updated the code so that when a start year is greater than the file group year, the start year is retained. 2. Added the start year to the Node Selections page between the Model and Node Type columns. 3. Made the nodes available dependent on the selected model.
Interactive User Guide wrong File Group information [115490]	<p>Summary: In the FP Interactive User Guide under Manage File Groups > About File Groups, the description lists the wrong data and forecast years.</p> <p>Resolution: Updated the text to display the correct current year and forecast year.</p>
Transfer to FP- add in step numbers in dots [118866]	<p>Summary: In the Transfer to FP utility, the utility pages (represented by small square icons below the page titles) did not have tool tips that listed the page numbers and names when users hovered them.</p> <p>Resolution: Added tool tips to each page icon.</p>
Model Processing Alert due to username field (set as General) is being autoformatted as date [121377]	<p>Summary: When users with a certain userID saved a Financial Planning node, they received an error message stating that the user number was not found. In the Model Processing Alert, formatting for the cell containing the user ID was set to General formatting, which converted the user ID to a date.</p> <p>Resolution: Updated the Model Processing Alert cells for User and Model to be formatted as Text instead of General. Updated the Scenario Manager Alert User and Scenario cells to be formatted as Text instead of General.</p>

Issue	Description
(2022.1) Transfer to FP - Error applying some MR filters when MR selected for Year 3 [124317]	<p>Summary: In the Transfer to Financial Planning utility, if users had Management Reporting selected for Year 3 (the most recent year) on the “Select which years and products to include” page, they received an error when they applied one or more of the following filters: FPType, Entity, Budget Group, DEPT.</p> <p>Resolution: Removed the extra word in the code that was causing the error.</p>
(2022.1) SuiteVariables file group aliases missing in new installations [130205]	<p>Summary: For new installations of Axiom Financial Planning, errors occurred in multiple areas because the SuiteVariables table was not populated with default Financial Planning records.</p> <p>Resolution: Changed the logic in Default Data to check whether Financial Planning is installed.</p>
Annual Rollforward Utility - Confirmation message indicates requester will get notification, but it actually goes to job owner [134439]	<p>Summary: When users rolled forward some nodes, the confirmation message indicated that users would receive a notification when the job was complete and that users could view the job execution in the Scheduler. Instead, the notification was sent to the Owner (the person who performed the last product installation), and the user (the Requestor) could not view the job execution details in the Scheduler.</p> <p>Resolution: Updated the execution code on the FP Annual Rollforward event handler from Owner to Requester.</p>
(2022.1) Transfer to FP - RF refresh variables display, Welcome Screen permits next steps, Mapping picklists for RF options only in systems licensed for RF 1.0 (Defect 136371)	<p>Summary: In an Axiom system licensed for Rolling Forecasting 2.0 but not 1.0, Rolling Forecasting refresh variables were not displayed in the Transfer to Financial Planning utility. The refresh variables are conditionally checked for the presence of the Rolling Forecast 1.0 license (Rolling Forecast Quarterly), but not the RF 2.0 license. Additionally, the utility Welcome page was locked or did not permit next steps, and mapping pick lists did not provide RF options.</p> <p>Resolution: Adjusted multiple areas to identify either Rolling Forecasting license.</p>

Issues fixed in 2022.1.1

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

Issue	Description
(2022.1 Patch) FP Interactive User Guide driver error - 2nd attempt (131282) [143614]	<p>Summary: When some users tried to open the FP Interactive User Guide from the FP Admin task pane, they received an error message, and the guide did not open.</p> <p>Resolution: Adjusted the lookup data to run on open, and changed a static variable to a dynamic variable to account for future years that do not have existing file groups when the guide is opened.</p>