Release Notes

Axiom Budgeting and
Performance Reporting
Version 2022.2

AXIOM

Version: 2022.2.5

Updated: 3/27/2023

Contents

About the Release Notes

Syntellis is pleased to announce the 2022.2 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.
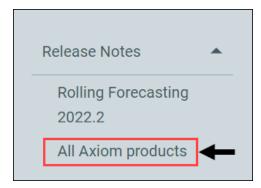
The purpose of these release notes is to provide you with the following:

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

▶ Accessing current and older release notes for Axiom Healthcare and Axiom Financial Institutions 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 2022.2

Axiom Budgeting and Performance Reporting 2022.2 includes the following enhancement in this release:

Performance Reporting Security Update utility – Enhancements improve your ability to manage all users. For more information, see "Managing Performance Reporting user security" in the online help.

What to know before upgrading

> **IMPORTANT:** You must apply the Axiom 2022.2 upgrade before applying any 2022.2 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2022.2 before the first product upgrade. Refer to the **Axiom 2022.2 Release Notes** and **Axiom Healthcare Suite 2022.2 Release Notes** for considerations before upgrading.

When upgrading to the 2022.2 version of Axiom Budgeting and Performance Reporting, note the following:

- Along with upgrading to Axiom 2022.2, you must upgrade to Axiom Comparative Analytics 2022.2.
- 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 2022.2

The following table lists the resolutions for issues addressed in 2022.2, released August 15, 2022:

Templates and Plan Files

Issue Description	Description
[T3] Case Number 00461386 - Budget Comments on ProviderComp not being retrieved upon reopen [134594]	**Summary:** On the Provider Comp tab, when users enter Budget Comments in the first three rows of the calculation method, the comments were not displayed in the plan file when it was reopened. However, comments added to the fourth row were displayed in the plan file. Two Provider Comp blocks were missing keys in Axiom Query (AQ) 20 and AQ21 for all productive pay rows from Guarantee through CompAlt3Tier. Only the Salary line and others below the productive salary section had keys. **Resolution:** Added keys to the AQ control columns so that comments are updated when the associated queries are run.
Initiative- Project Initiatives created by Profile utility are not querying back line item data after a rebuild [136438]	**Summary:** After users created, saved, and refreshed a project initiative, if they inserted data and saved it to the BUDyyyy table, then built and processed the plan file, the data in the BUDyyyy_detail table was zeroed out. AQ5 zeroed some of the rows brought in by AQ4. **Resolution:** Removed from AQ5 the code that was causing the data to zero out on update.
(2022.2) [T3] Case Number 00465927 - Initiative values on Summary tab differ after saving initiative tab versus saving main plan file [139738]	**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.
(2022.2) [T3] Case Number 00467397 - Hours not coming over to Expense tab in plan file until another recalc [141174]	**Summary:** Budgeted hours did not populate the Expense tab when plan files were initially processed. When processed a second time, the budgeted hours populated. **Resolution:** Adjusted the responsible Axiom query so that data populates correctly with the first processing.

Issue Description	Description
(2022.2) Budget Template - Formula errors require revisions to intended description + reinstating missing formula references [142403]	**Summary:** On 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.

Report updates

Issue Description	Description
Productivity File collect Save and Email File function not working [37163]	**Summary:** The Productivity File collect Save and Email File function was not working because the formula was worded incorrectly. **Resolution:** Changed the FileCollect picklist wording for all assets from "Save and Email File" to "Save File and Send Email."
(2022.2) [T3] Case Number 00459812 - Inconsistent use of the ACCT.RptMap causing inconsistent results between the Managers Month End Dashboard and the Department Monthly Package [134409]	**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 (for example, 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.
(2022.2) Performance Reporting Security Update removes permissions granted to other roles and subsystems [136570]	**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 2022.2.5

No client-facing issues were addressed in 2022.2.5, released on March 31, 2023.

Manual configuration instructions and technical considerations

No manual configuration instructions or technical considerations are necessary for this release.