

Release Notes

Axiom Budgeting and Forecasting
for Higher Education
Version 2022.3

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. The top and bottom lines are a light blue color, while the left and right lines are a light purple color.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2022.3 release of Axiom Budgeting and Forecasting. 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 online help. On the help home page, click the Release Notes link at the top of the page.

What's new in Budgeting and Forecasting 2022.3

Welcome to Version 2022.3 of Axiom Budgeting and Forecasting!

The following new feature is included in this release:

Detailed Labor Benefit Planning

Instead of being forced to plan benefits at a single blended rate, you now have the option to break out benefits into up to four fixed detail lines and up to eight variable detail lines. Institutions that prefer a blended rate can use a single variable detail line. You can assign each detail line a unique combination of attribute drivers to differentiate from another benefit detail line, and choose from new attributes (such as employee medical plan/medical coverage selections). This enhancement provides institutions more flexibility and precision when planning benefits, while simultaneously streamlining the process of benefit driver setup.

Use the revised Labor Planning Config tab in the Budget Setup Utility to break out labor benefits relevant to your institution, as well as which data attributes serve as the driver for each benefit detail.

AXIOM Budgeting Home Budgeting Reports Labor Reports Budget Request Reports Forecasting Reports Administration

Define the budget level of detail

Budget Dimensionality

Plan File Analysis Save

SYSTEM CONFIG BUDGET DIMENSIONS COLUMNS

Plan File Dimensions Labor Planning Config

Setting Use to Drive Merit

Position Category Yes

Bargaining Unit Yes

In Use	Position Category	Bargaining Unit	Department1	Not Used	Fund1	Account	Medical Plan	Medical Coverage	Dental Plan	Dental Coverage	Labor Employee	Labor Position
Yes	Medical Insurance	No	No	No	No	No	Yes	Yes	No	No	No	No
Yes	Dental Insurance	No	No	No	No	No	No	No	Yes	Yes	No	No
Yes	Vision	No	No	No	No	No	No	No	No	No	No	Yes
No												
Yes	FICA	No	No	No	No	No	No	No	No	No	No	Yes
Yes	AD&D	No	No	No	No	No	No	No	No	No	No	Yes
Yes	Retirement	No	No	No	No	No	No	No	No	No	No	Yes
Yes	Spend	No	No	No	No	No	No	No	No	No	No	Yes
No												
No												
No												
No												

Fixed Benefit Detail

Variable Benefit Detail

Use the updated Labor Drivers utility to set up rates for each benefit detail, at the level of granularity set in the Budget Setup utility.

AXIOM Product Suite

Enter benefit rates for each labor planning account.

Labor Planning 2023 - Labor Planning Settings

[Push Benefits to Plan Files](#) [Save](#)

GENERAL		SPREADS		FIXED BENEFITS		VARIABLE BENEFITS		MERIT		COLUMNS		
Medical Insurance		Dental Insurance		Vision								
Delete	Medical Plan	Medical Coverage	Description	Benefit Account	FY 2022 Salaries & Wages	Employee Count	FY 2023 Rate	FY 2023 Estimated Benefits	FY 2024 Rate	FY 2024 (Based off FY 2022)	FY 2025 Rate	FY: (Based off)
	HDHC	Family	Enter Description	-	\$7,756,070	496	9,000	\$4,464,000	9,100	\$4,513,600	9,200	
	HDHC	Single	Enter Description	-	\$123,701	496	6,000	\$2,976,000	6,100	\$3,025,600	6,200	
	PPO	Family	Enter Description	-	\$1,102	496	9,000	\$4,464,000	9,100	\$4,513,600	9,200	
	PPO	Single	Enter Description	-	\$104,443	497	6,000	\$2,982,000	6,100	\$3,031,700	6,200	
+ Add Row												

In labor plan files, benefits data per distribution is displayed at the rolled up Fixed/Variable level, but is reportable at the individual benefit detail level.

Position Detail: Cassandra Crosby, President - dept000010 (d000010)

Position

President

Position ID: S000176

Start Date: 1/7/2018

End Date:

Category: Staff Exempt

Bargaining Unit: Unclassified

Employment

Cassandra Crosby

Employee ID: E0003820

Pay Type: Salary

Working Hours: 2,080

FTE: 1.00

Spread:

Regular Pay

Proposed Salary: \$421,898.00

Base Salary: \$421,898.00

Merit: 0.0% on 07/01/22 \$0.00

Salary Adj. 1: \$0.00

Salary Adj. 2: \$0.00

Salary Adj. 3: \$0.00

Distributions

Department1	Fund1	Acct	Distributions	FTE %	July 2022	August 2022	September 2022	October 2022	November 2022	December 2022
d000010	101000	6050	Distribution Override	55.0%						
			Distribution %	55.0%	55.0%	55.0%	55.0%	55.0%	55.0%	55.0%
			Distribution \$		19,337	19,337	19,337	19,337	19,337	19,337
			Fixed Benefits		413	413	413	413	413	413
			Variable Benefits		2,465	2,465	2,465	2,465	2,465	2,465
d000013	101000	6050	Distribution Override	45.0%						
			Distribution %	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%
			Distribution \$		15,821	15,821	15,821	15,821	15,821	15,821
			Fixed Benefits		338	338	338	338	338	338
			Variable Benefits		2,017	2,017	2,017	2,017	2,017	2,017
+ Insert New Distribution					Total Distributed Salary \$	35,158	35,158	35,158	35,158	35,158

[Save](#) [Close](#)

What to know before upgrading

IMPORTANT: You must apply the Axiom 2022.3 upgrade before applying a 2022.3 Axiom Budgeting and Forecasting product upgrade. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2022.3 before the first product upgrade

When upgrading to the 2022.3 version of Axiom Budgeting and Forecasting for Higher Education, note the following:

- You should have the updateable version of any Axiom Budgeting, Forecasting, or Budget Requests products in order to upgrade.
- 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.
- Shared tables might have their columns reordered or have new columns added to them.

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 five days of advance notice. The request should include the following information:
 - Axiom platform version.

- Axiom for Higher Education 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.

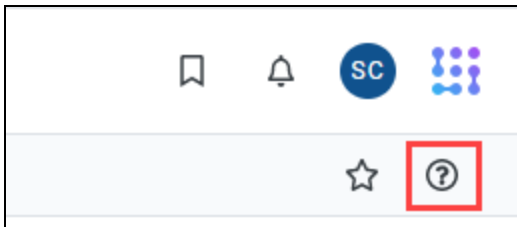
Getting help and training

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** – Web-based 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.



► Syntellis Central

[Syntellis Central](#) provides centralized self-service content and resources for the Axiom Budgeting and Forecasting for Higher Education product, as well as all Axiom 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 Budgeting 2022.3

Issue	Description
142606	<p>Summary: Plan file populator utility: The plan file populator utility interpreted certain plan file values as a scientific notation (for example, 26E4 is interpreted as 26×10^4), and incorrectly reformatted the plan file value accordingly. This reformatting caused a save error, as the new value (e.g. 26×10^4) did not exist in the PlanFile table.</p> <p>Resolution: Resolved</p>
128610 (support item 00441544)	<p>Summary: : Plan file processing utility: Depending on the order of operations of data load, the plan file processing utility did not correctly assign the Input Adjustment calc method to records when appropriate and instead assigned a <blank>.</p> <p>Resolution: Resolved</p>
136980	<p>Summary: Budget Request template: New rows were not saved on the Budget Request Schedules page if users did not enter a non-zero value.</p> <p>Resolution: Resolved</p>
138506	<p>Summary: Budget home page: The user's last name was not queried into the budget home page. Newly created budget requests (or any other client changes to the home page that relied on the user's last name) displayed the incorrect last name.</p> <p>Resolution: Resolved</p>
142603, 154368	<p>Summary: Budget template: The Comments field in budget plan files incorrectly included comments entered by users in a budget request that rolled into the corresponding budget plan file.</p> <p>Resolution: Resolved</p>

