Release Notes

Axiom Budgeting and
Performance Reporting
Version 2023.1

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.1 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.
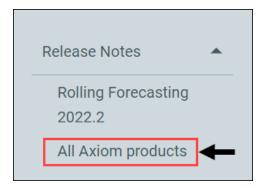
The purpose of these release notes is to provide you with the following:

- 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.

▶ 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 2023.1

Axiom Budgeting and Performance Reporting 2023.1 includes the following enhancements:

INFOR API Integration

The Axiom platform release will deliver a standard API connection to be used within Axiom ETLs and Scheduler jobs. Each product will implement a standard and recommended data integration package.

Highlights:

- A decrease in time to ROI with improvements to implementation time, effort, cost, and complexity
- A standard, recommended approach to implementation
- Improved consistency and reliability

Other enhancements

- **PayType Dimension** – Six-column validation to eliminate non-valid entries and greatly reduce Axiom Query errors during plan file processing. Entries in the following columns are now validated:

    - Jobcode

    - Staffing

    - Employee

    - Provider

    - GLAcct

    - HrAcct

> **IMPORTANT:** The new validation columns changed the column order of the PayType dimension table, and existing entries that become invalid because of this validation will be changed automatically. Invalid account entries will be changed to "0" (zero), and invalid paytypes will be changed to "NA." You must review the table and update pay types that were changed in any of the six newly validated columns.
>
> Use the PayType Dimension Validation Audit report to identify classification changes made to the PayType dimension table following your first release upgrade after 2022.3. For instructions and location of the report, see Manual setup instructions in the release notes.

- **Initiative account association and automatic calculations** – New initiative calculation (calc) methods enable you to link your accounts with common associations and provide greater flexibility when budgeting your initiatives. These associations save time when making changes to accounts with associated expenses and minimize the possibility of making changes to one account and missing the associated accounts. For example:

  - Deductions – Associate a deduction with a revenue account, and then enter a percentage (%) to automatically calculate the budgeted deduction expense as a percentage of the selected revenue account.

  - Salaries – Associate a salary account with an hours account, and then enter an average hourly rate to automatically calculate the salary expense.

  - Detail Benefits w Percent – Associate a benefit account with a salary account, and then enter a percentage to automatically calculate the benefit expense as a percentage of salary expense.

  Each one of these new calc methods has a corresponding "Add..." calc method for adding new, additional accounts as needed.

- **Headers automatically enabled in utilities, drivers, and plan files** – Instead of opening a plan file or driver and selecting the Headers checkbox on the Main ribbon tab, headers are now enabled automatically on all worksheets.

What to know before upgrading

> **IMPORTANT:** You must apply the Axiom 2022.4 upgrade before applying any 2023.1 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2022.4 before the first product upgrade. Refer to the **Axiom 2022.4 Release Notes** and **Axiom Healthcare Suite 2023.1 Release Notes** for consideration before upgrading.

When upgrading to the 2023.1 version of Axiom Budgeting and Performance Reporting, note the following:

- Along with upgrading to Axiom 2022.4, you must upgrade to Axiom Comparative Analytics 2023.1.
- 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.
- Shared tables might have any of the following changes:
  - Columns reordered
  - New columns added
  - Old columns removed (rare)

    If you copy and paste into or from Axiom tables, please review the column order of those tables after upgrading to assess the impact to your internal processes.

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 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 2023.1

The following table lists the resolutions for issues addressed in 2023.1, released February 13, 2023:

Budgeting: templates, plan files, and drivers

Issue Description	Description
PFB-07545 - 38 Budget Provider Driver - orphan records [35319]	**Summary:** When the Budget Provider Exception Volume driver (#38) was processed for the first time, work relative value units (WRVUs) were stored in the BUDGET20XX_Provider Vol table for the provider. The Provider_Comp tab used the Global configuration to process the WRVUs. When users changed PROVIDER.VolSum for the provider, the Provider Vol driver correctly excluded the provider in the refreshed results. However, no zero-on-save logic was present in the driver, so the WRVU record for the provider was not removed from the BUDGET20XX_Provider Vol table. **Resolution:** Enabled the zero-on-save logic in the driver and added an Axiom Query (AQ) filter to exclude cases in which fields are empty.
Contract Providers on ProviderComp are hidden and not selectable when using GoTo. [39972]	**Summary:** In the Budget Provider Configuration driver, users set the Contract Provider JobCode fields to "NotUsed" and then applied the driver to a Provider plan file. Users processed the plan file, and then opened it to the ProviderComp tab. When users accessed the GoTo menu in the Main ribbon tab, the menu included "Input Contract Provider Name," which should not have been an option. **Resolution:** Updated the corresponding Provider Template cell formulas to hide options that were not applicable.
ProviderDetail tab: Providers with multiple jobcodes on ProviderComp tab not summing on ProviderDetail tab [40114]	**Summary:** In Provider plan files, if providers had more than one jobcode in the same department, the amounts did not sum on the ProviderDetail tab. **Resolution:** Updated the Provider detail calculation (calc) method to sum multiple jobcode data in the same department for the same provider, if applicable.

Issue Description	Description
PFB-08766 - Provider Summary - New Provider - description still shows Relative Availability [48344]	**Summary:** In Provider plan files, when using the Provider Summary methodology in their budgeting, users added new providers to the plan files. Although data flowed correctly through the plan files, the row header displayed "Relative Availability," which was incorrect. **Resolution:** Updated the row header formula to recognize entry in both the current year projection and next year budget, and to display the data correctly.
PFB-08859 - Summary tab – Column U for Initiatives should Hide if the Initiatives feature is turned off in the Configuration driver [48858]	**Summary:** When the Show Initiatives tab setting in the Budget Configuration driver was set to "Hide" for a listed entity, the New Initiatives column (column U) was not hidden on the related plan file Summary tab. **Resolution:** Updated the column logic so that the New Initiatives column was hidden on the Summary tab when the Show Initiatives Tab was set to "Hide" in the Budget Configuration driver.
PFB-08910 - Worked Hours Per Unit by Department by JobCode [49020]	**Summary:** In the Worked Hours Per Unit by Department by JobCode report (WHPUOS), a formula error caused the wrong variables to be referenced. **Resolution:** Updated the field definition rows and modified the reference formulas in the applicable columns.
PFB-09250 - New Provider Utility-Detail Method needs to use CPT.KHABgtCode in SumBY [57152]	**Summary:** In the Provider Utility-For Detail Method, an incorrect SUMBY equation in Axiom Query (AQ) 1 and AQ3 brought in the wrong number of CPT Categories. **Resolution:** Corrected the formula to use CPT.KHABgtCode instead of CPT.KHAInt.

Issue Description	Description
[Tech debt] "supportingdetail" tables are incorrectly being used for reporting [144008]	**Summary:** The Supporting Detail tables were not intended for report writing purposes, but rather, to store and rebuild plan file data from a point in time based on toggle usage. Do not use the following tables in the Axiom Table Library for reporting purposes: • \Management Reporting\Budget\BUD20XX_ SupportingDetail, • \Budgeting\Detail and Initiatives\BUD20XX_Detail_ SupportingDetail • \Budgeting\Rev Usage\BUD20XX_RU_SupportingDetail. **Resolution:** Added a note to each table's description that reads: "Do not use this table for reporting purposes."
Case Number 00479094 - 02 Labor Config Driver - Lump Sum Payout paytype is not being retrieved into the driver upon reopen due to incorrect row reference [151301]	**Summary:** In the 02 Labor Configuration driver, an incorrect row reference caused the LumpSum payout formula that returns the previously saved pay type mapping to bring in the wrong value from the associated data table. The error implied that the driver did not save values. **Resolution:** Updated the formulas in the driver's Multiplier, PayType, and Account fields to reference the cells in the correct row.
BP - Employee Tab, AHRs are zeroed out when CY Projected FTEs 0 [157842]	**Summary:** On the plan file Employee tab, a formula change that was made for the Program Additions line resulted in a $0 (zero) rate when no current year projected FTE was in a JobCode block. When users opened a plan file that used the employee template, and then inserted a new employee in an existing JobCode block, no dollars were allocated to the Regular paytype if users put a zero in the Current Year (CY) FTE for that employee, because the start rate referenced the Program Additions line that was $0. **Resolution:** Updated the Current Program Additions line formula to handle an entry of $0 (zero) for a projected FTE.
BP - Deliver Z_Employee as Standard Paytype in Dimension Table [158221]	**Summary:** In recent installations of default data, the pay type Z_Employee was not delivered to users, which caused problems when users built out plan files using employee-level budgeting. **Resolution:** Updated the default data package to include the Z_ Employee option in the Paytype dimension table.

Issue Description	Description
(2023.1 GA) Current Year Projected Rate Percent in Driver 14 Calculated Twice in Budget Plan Files [163608]	**Summary:** For plan files that did not use the Emp_List tab and for which the Labor Rate Override driver was set to Base for the Jobcode Labor methodology, when users added a percentage Market-2 increase to current year projected rates in the global section of the Budget Labor Rates driver, the percentage was calculated twice when applied to the Jobcode Start Rate in the plan files. **Resolution:** Removed the duplicate rate increase made to the Base rate in the Jobcode block calc method when the specific criteria described in the Summary section is met.
(2023.1 GA) Case Number 00492156 - Budget Workbook, Jan-June Expense is not Correct [164391]	**Summary:** When building their operating budget plan files, users noticed that in the Jan-June projected expenses, Dept.Acct populated as $0. The related formula referenced the wrong cell on the Variable tab. Additionally, on the Expense tab, a field change caused an error to be returned instead of data. **Resolution:** Removed the incorrect variable from the lookup field reference formula on the Variables tab and updated the Add New Calc Method formulas on the Expense tab.

Performance Reporting

Issue Description	Description
PFB-07934 - IncomeStatementSummaryDrill doesn't work with Jobcode.GLAccount [38223]	**Summary:** In the IncomeStatementSummaryDrill report, when users drilled down from a Sales & Wages amount to an underlying jobcode using JobCode.GLAcct, the drill did not work because cell AD3 in the jobcode target drill sheet was hard-coded to PayType.Acct. **Resolution:** Updated the cell formulas to accommodate GL/Payroll mapping filters and updated the drill jobcode to reference the correct cell.
PFB-08574 - FormattedGrid - 1 The data source has not been set - VCC_Thresholds report [46547]	**Summary:** When users tried to add a new entry to a VCC_Threshold report that contained more than 250 entries, they received an error because of a primary tag on the sheet. **Resolution:** Moved the primary tag and the Entity Axiom Query (AQ) to a separate sheet.

Issue Description	Description
PFB-09170 - Index Match issue with the Productivity dashboard [58839]	**Summary:** In the Productivity BiWeekly-SingleDept report, the Skill Mix comparison and the Average Hourly Rate charts displayed a mismatch of data because the index formula on the Productivity sheet did not reference the correct row on the data sheet. **Resolution:** Updated the two Axiom queries that pull and feed data to the report charts.
PFB-09297 - Month End Dashboard - Cannot Filter on Entity [66809]	**Summary:** In the Month End Review Dashboard, when users selected "Entity" from the Category & Filter (Summary & Executive) drop down, the related Select Filter menu contained no selectable values, even when there were existing Entities in the system. **Resolution:** Updated various cell variable formulas, and then updated the Month End Review Dashboard to use RPTMap mapping for data retrieval.
PR Productivity Biweekly Single Dept Dashboard - Visualization output improperly display expected JobClass due to misaligned lookups and data output [154487]	**Summary:** In the Productivity BiWeekly-SingleDept report, incorrect field definitions in the report's Axiom Queries resulted in mismatched data in the report charts. **Resolution:** Updated the query data filter and field definitions to pull the correct data.
Case Number 00483723 - Manager Month End Dashboard plus Budgeting Local Admin Role Error [158347]	**Summary:** In the Security Manager, Financial tables have a table type user filter. When this filter was combined with the filters in the Budgeting Local Admin role, parentheses around the filter were added in the filter definition in the Effective Permissions field. Then, when the fix for defect PFB-09297 was applied, it created a syntax error in the column filter of the Month End Review Dashboard. **Resolution:** Updated various cell variable formulas and adjusted the Variables tab category filter.
PR - Point All FTE Factors in Dept Monthly Package to Period Table Instead of Calculating [158823]	**Summary:** In the Department Monthly Package, the period variables on the BudVar tab pointed to the Period table, but the periods in the Monthly Side by Side report section did not. **Resolution:** Removed the calculation formulas on the Monthly Side by Side periods and changed the variable formulas to reference the period table directly.

Issue Description	Description
PR - Manager's Month End Dashboard Doesn't Populate Departments In Filter [159257]	**Summary:** In the Month End Review Dashboard, the Dept.Entity=1400 filter did not work after users upgraded to Performance Reporting 2022.2.1.25. **Resolution:** Updated various cell variable formulas and adjusted the Variables tab category filter.

Issues fixed in 2023.1.1

The following table lists the resolutions for issues addressed in 2023.1.1, released March 31, 2023:

Budgeting: templates, plan files, and drivers

Issue Description	Description
(2022.3 Patch 4) Case Number 00502656 - 02 Budget Labor Configuration Driver, if February is included in the YTD, and the next year is a Leap Year, the current year YTD and Projected FTE factors are not calculating correctly. [1168071]	**Summary:** The current year Year-To-Date and Projected Full-Time Equivalent (FTE) factors in the 02 Budget Labor Configuration Driver were incorrectly calculating when the month of February was included in the current year YTD period when budgeting for a Leap Year and the FTE Scale selected was Yearly or Monthly. **Resolution:** The formulas associated with the Yearly and Monthly FTE scale options were updated to correctly calculate the current YTD and Projected FTE factors.
(2023.1 Patch 1) Case Number 00502656 - 02 Budget Labor Configuration Driver, if February is included in the YTD, and the next year is a Leap Year, the current year YTD and Projected FTE factors are not calculating correctly. [#1168074]	**Summary:** The current year Year-To-Date and Projected Full-Time Equivalent (FTE) factors in the 02 Budget Labor Configuration Driver were incorrectly calculating when the month of February was included in the current year YTD period when budgeting for a Leap Year and the FTE Scale selected was Yearly or Monthly. **Resolution:** The formulas associated with the Yearly and Monthly FTE scale options were updated to correctly calculate the current YTD and Projected FTE factors.

Issues fixed in 2023.1.2

No client-facing issues were addressed in 2023.1.2, released on April 24, 2023.

Manual setup instructions

Changes made to the PayType dimension table for this release may result in some existing entries being invalidated in any of the six columns that are now validated. To correct any invalid entries, follow these steps after installing the 2023.1 upgrade:

1. Open the **PayType Dimension Validation Audit Report** located at:

    \Axiom\Reports Library\System Files\Dimension Maintenance\PAYTYPE Dimension Validation Audit Report.xlsx

    This report shows which pay types had classification changes in any of the six validated columns.

2. Use the report to review any pay types that were changed to a "0" (zero) or "NA" in any of the six newly validated columns:

    - **GLAcct**

    - **HrAcct**

    - **Jobcode**

    - **Staffing**

    - **Employee**

    - **Provider**

3. Open the **PayType** dimension table and select a valid entry for any pay types that were changed.

4. Save the **PayType** dimension table.