

Release Notes

Axiom Budgeting and
Performance Reporting
Version 2023.4

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame that has a blue-to-purple gradient. The frame is composed of two horizontal lines and two vertical lines, with the top and bottom lines being slightly longer than the side lines.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.4 release of Axiom Budgeting and Performance Reporting. Each product release provides new features, enhancements, and configuration options. 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

This document provides the list of changes to shared areas of the Axiom Healthcare Suite products, which includes:

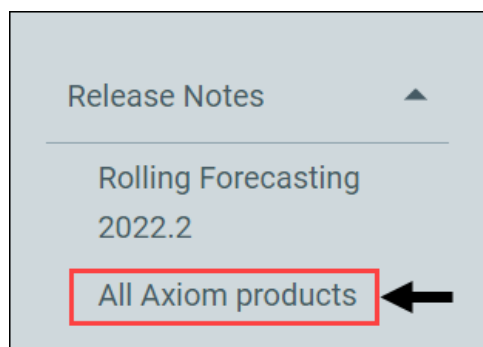
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

Each Axiom Healthcare Suite product has their own separate release notes that provide additional details about features and fixes that are specific to that product.

Prior to upgrading, review the **Axiom 2023.3 Release Notes** and the release notes for each product that is licensed by your organization.

► 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**.



What's new in version 2023.4

Welcome to Version 2023.4 of Axiom Budgeting and Performance Reporting!

This release of Axiom Budgeting and Performance Reporting includes the following new features and enhancements:

Budget Planning

▶ Added PHYINT column to PayType dimension

- Added a PHYINT column to the PayType dimension. This differentiates hours and dollars interfaced into the hospital from those into provider plan files.
- Updated the Physician Detail calculation method to recognize the new PayType.PHYInt classifications.

NOTE: See [PAYTYPE](#) in the online help for additional information.

▶ Provider Detail Comp calculation method update

Updated the Provider Comp section in the Driver 29 Provider Configuration Driver to provide Productive and NonProductive PayTypes options.

▶ New Dollars_History Salary Calculation Method

Created the Dollars_History calculation method, which provides a dropdown option to:

- Budget premium salary dollars by annualizing current year actual data.
- Use prior year actual data amounts and posted periods.

▶ ACCT dimension tooltip

Added a tooltip above the KHAStdLine and PHYStdLine columns on the ACCT dimension page.

▶ Budget Variance visualization and data model updates

Updated Intelligence Center visualizations and data models to use RPTMAP fields from the DEPT and ACCT tables.

▶ Budget Variance visualization tooltips

Updated Intelligence Center visualizations with PowerBI tooltips that display details related to the hovered-over item.

▶ Budget Variance visualization dashboard

Updated Intelligence Center visualizations to use a relative date filter that defaults to the most recent fiscal year.

▶ Budget Variance visualization security filter slicers

Updated Intelligence Center visualizations with security-based slicers for the following:

- Dept.Rptmap.Entity
- Dept.Rptmap.Division
- Dept.Rptmap
- Year/Month

Performance Reporting

▶ Enhanced PayType Mapping Analysis report

Added logic to the PayType Mapping Analysis report to identify PayType mapping and classification errors.

▶ Updated Budget Process checklist

Rearranged the steps in the checklist so that the "Confirm PayType Mapping Analysis report has no variances" step occurs earlier in the process. It is now located above the "Create one plan file for each labor tab template" step.

What to know before upgrading

IMPORTANT: You must apply the latest Axiom upgrade before applying any 2023.4 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2023.3 before the first product upgrade. Refer to the **Axiom Release Notes** for consideration before upgrading.

When upgrading to the 2023.4 version of Axiom Budgeting and Performance Reporting, note the following:

- 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 returned to its original location.
- Syntellis product templates and calculation method libraries are replaced.
- Product task panes are replaced.
- Process definitions are not replaced. Process Manager will not currently work with the new system tables and web-based pages and utilities. Please review and potentially revise any Cost Accounting process definitions, depending on the scope and tasks that were created and are currently in use.
- 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. For example, Process Manager-defined processes for Cost Accounting must be modified by Client Success and have limitations with accessing web-based tasks.
- 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.

Prepare and schedule 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 or contact Support by creating a support case to request a Preferred Upgrade Window:
 - Log in to [Syntellis Central](#).
 - Click **Support Cases**.
 - Click **Schedule an upgrade**.
 - Enter your Preferred Upgrade Window information.
 - Click **Submit**.
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps to enable features for this version.

Get help and training

Syntellis provides world-class resources directly within the Axiom system. Axiom Help provides topics, release notes, webinar/training announcements, and videos to guide you through managing your system.

To access these resources, click **Online Help** from the **Main** or **Admin** tabs, and then select the product. Axiom Help opens in a new browser. The online help opens only for products you are licensed to use.

► Syntellis Central

Syntellis Central provides centralized self-service content and resources for the Axiom Healthcare Suite 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.
- Ask a question in the peer-to-peer Syntellis Community.
- Submit a Support issue, find suggested content, and manage any outstanding issues directly with Support.

Issues fixed in 2023.4

The following table lists the resolutions for issues addressed in 2023.4, released October 23, 2023:

Budgeting: templates, plan files, and drivers

Issue Description	Description
ProviderDetail: Red Flag pop-ups are looking at Configuration driver instead of Provider Configuration driver [#59225]	Summary: On the ProviderDetail tab, the red flag pop-up referenced the thresholds in the Budget Configuration driver instead of the thresholds in the Budget Provider Configuration driver. Resolution: Updated the references in cells in X55 through X57.

Issue Description	Description
Case Number 00508116 - Staffing Tab: NonProd formula is doing a SUMIF on the entire sheet instead of within the individual JobCode blocks in column N [#59161]	<p>Summary: The NonProd formula executed a SUMIF function on the entire worksheet instead of within the individual JobCode Blocks in column N.</p> <p>Resolution: Updated Column N on the Non-Productive row for both the JobCode Block and the Add New JobCode Block.</p>
PFB-09509 - Employee tab CY Proj Rate reference [#59187]	<p>Summary: On the budget plan Employee tab, the remaining projected salary on an existing employee applied the remaining Current Year hours to the Current Pay Rate.</p> <p>Resolution: Updated the Employee calculation method with the correct formula.</p>
BP Staffing tab DeptAvgPerPaidHr CM NYB Dollars referencing #DIV/0! error [#66230]	<p>Summary: When the DeptAvgPerPaidHr calculation method was inserted into the Staffing tab, a DIV/0! was displayed.</p> <p>Resolution: Updated the DeptAvgPerPaidHr calculation method.</p>
BP Staffing tab Jobcode CM applies merit and market increases without considering start month [#66246]	<p>Summary: The Staffing tab in the Add New JobCode calculation method applied merit and market increases without considering the start month.</p> <p>Resolution: Added a JobCode Block calculation method.</p>
Case Number 00506059 - ProviderComp tab: ProviderSummary Calc Method,Rev Adj from driver not factored into Projection column [#59165]	<p>Summary: On the ProviderComp tab, the ProviderSummary Calc Method,Rev Adj from the driver was not factored into the Projection column.</p> <p>Resolution: Adjusted the Add New Provider Summary calculation method.</p>
Case Number 00517718 - Employee, Jobcode, & Staffing Tabs GoTos don't honor dept/jobcode combination when KHABgtcode is used to combine various depts [#59450]	<p>Summary: The GoTo function for the following plan file tabs did not honor the Dept and JobCode combination when the KHABgtCode was used to combine departments:</p> <ul style="list-style-type: none"> • Employee • JobCode • Staffing <p>Resolution: Implemented conditional logic to determine if a plan file used KHABgtCode to map multiple departments in the plan file.</p>

Issue Description	Description
Case Number 00505140 - Drivers 18 and 19 Adjustments do not flow into Detail CML on the Expense tab [#59167]	Summary: Adjustments to Drivers 18 and 19 were not reflected in the Detail calculation method. Resolution: Updated the Detail calculation method so that adjustments from Drivers 18 and 19 flow into the Expense tab from the BUD Master template.
PFB-09101 - Budget Security Update Text Function Error [#59193]	Summary: (Excel only) The Budget Security Update utility used a TEXT function with a 255-character limit. Resolution: Updated the formulas to process empty values from the referenced cells.
Case Number 00519054 - Net PTO Calculation seems to not be recognizing changes in alloc rate [#69106]	Summary: The Net PTO Calculation did not recognize changes in the allocation rate. Resolution: Updated the D43 and E43 cells on the Empl_List tab.
Case Number 00519507 - Job code detail does not tie to job code total? [#68932]	Summary: The Jobcode total did not equal the productive and non-productive FTE breakouts for the JobCode Block. Resolution: Updated the JobCode Block calculation method on the Staffing tab.
Budget Planning: Employee tab, AQ10 needs sort order change. [#72002]	Summary: The sort order in AQ10 on the Employee tab was incorrect. Resolution: Changed the sort order by adding Paytype.Employee.
Case Number 00519910 - Differing read views with Budget Driver 43 due to case sensitivity [#69381]	Summary: At times, the table security for Budget Driver 43 did not process references with different sentence cases (for example, 'RENOWN' versus 'Renown'). Resolution: Adjusted the formula to better interpret the applicable sentence case.

Issue Description	Description
<p>Benefits rows on Initiative tab are not shown as approved and not appearing on Summary tab.</p> <p>[#73976]</p>	<p>Summary: When new initiatives are added to the budget plan file with Benefit account detail, the Benefit account detail is saved only to the BUD20XX_Detail table. The data is not saved to the BUD20XX table after the initiative is approved.</p> <p>This issue affects the following calculation methods:</p> <ul style="list-style-type: none"> • Add Salary • Salaries • Add Deductions • Deductions • Add Detail Benefits w Percent <p>Resolution: For these five calculation methods, the formulas were changed in columns Z:AK to reference the corresponding monthly values in columns I:T times the anchored value in column AL. The value in AL is 1 when initiative is "Approved" and 0 when initiative is excluded.</p>
<p>BP Dept Other pay Paytype not interfacing on Staffing Labor Method</p> <p>[#78174]</p>	<p>Summary: The following items did not interface with PayType on the Staffing Labor calculation method:</p> <ul style="list-style-type: none"> • Dept_InputMonthly • Dept_InputTotal • DeptAvgPerPaidHr <p>Resolution: Expanded the current "Default to Global" test to ensure that zero values are saved correctly.</p>
<p>BP Staffing tab: Interfaced CM's total is not added to Jobcode block total</p> <p>[#74784]</p>	<p>Summary: When using the Add New JobCode Block calculation method, the dynamic link libraries (DLLs) that were added to the Jobcode Block were not processed.</p> <p>Resolution: Created a New JobCode Block calculation method.</p>

Performance Reporting

Issue Description	Description
Performance Reporting Security Update: In a system that has PR installed but no productivity installed, the Productivity subsystem option is visible and save produces errors	Summary: In a Performance Reporting system without Productivity installed, saving with productivity set to TRUE returns an error. Resolution: Updated the formula for cell S24 to replicate the formula for cell U24.
[#58543]	

Issues fixed in 2023.4.2

The following table lists the resolutions for issues addressed in 2023.4.2, released on January 10, 2024:

Budgeting: templates, plan files, and drivers

Item	Description
Division by zero error in Budget Expense tab - Provider Budget Plan Files Process Errors - Detail Expense Lines	Summary: After the application was upgraded to version 2023.4, the system displayed an error after processing the provider plan files. Resolution: Updated the formula for the following calculation methods on the Expense tab:
[#86973]	<ul style="list-style-type: none">• Add New Detail• Detail• Variable• Variable_Stat• Add Detail - Input Total