Release Notes

Axiom Comparative Analytics
Version 2020.3

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2020.3 release of Axiom Comparative Analytics. 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 Comparative Analytics online help. On the help home page, simply 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 navigate to the **More Information** section.
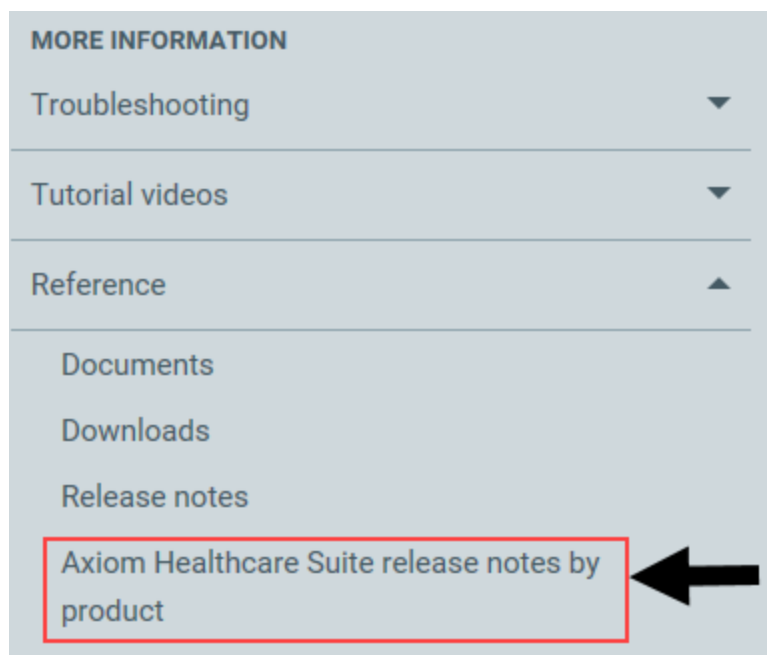
New features in 2020.3

Axiom Comparative Analytics 2020.3 delivers expanded innovations across the entire Customer 360 platform, empowering you to get a single shared view of your customers and deliver more moments that matter.

Department Improvement Opportunity dashboard

This feature allows you to understand your department-level financial performance against your peers and variance differences in percentiles.

New columns in DEPT table

New columns in the DEPT table create groupings that are used to determine calculations of your data. These columns give you the ability to map this data without impact to your management structure or budget process.

Department Improvement Opportunity dashboard

▶ Why use this feature

Use this feature when completing your budget, entering variance comments collections or updating your Rolling Forecast to identify budget operational variances within a department and analyze opportunities to improve department budget performance against your peers.

▶ How this feature works

This feature allows you to understand your department-level financial performance against your peers and variance differences in percentiles.

Where: The **Department Improvement Opportunity** dashboard is accessible from the Comparative Analytics homepage.

Who: Comparative Analytics users and administrators have access to this feature. Users with a Rolling Forecast license have the ability to select "RFGroup" in the **Grouping Type** drop-down.

How: On the Department Opportunity dashboard, use the drop-downs at the top of the display to narrow the displayed data then click **Apply**. You must select, at least, a time period and entity. The **Opportunity** column displays your dollar variance performance against the 50th percentile of your peer group. Use the **Next Peer Up** columns to analyze model scenarios and identify budget targets for improving your percentile position.

▶ Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Department Improvement Opportunity"

New columns in DEPT table

▶ Why use this feature

New columns in the DEPT table create groupings that are used to determine calculations of your data. These columns give you the ability to map this data without impact to your management structure or budget process. These columns do not have any connection to other products such as Performance Management.

▶ How this feature works

When a department or entity needs to be grouped to a more relevant department or entity for comparison, you can use the **CompAnEntityMap** column to group entities and the **CompAnDeptMap** column to group departments.

Where: The DEPT table in the Windows Client.

Who: Users with the Management Reporting Admin and/or Management Reporting Analyst roles.

How: Open the DEPT table using the **Dimension Maintenance** utility in the **Dimension & Reference Maintenance** section of the **Mgmt Admin** task pane.

▶ Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Dimensions used by Comparative Analytics"

What to know before upgrading

> **IMPORTANT: You must apply the Axiom 2020.3 upgrade before applying any 2020.3 Axiom product upgrades.** Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2020.3 before the first product upgrade. Refer to the **Axiom 2020.3 Release Notes** and **Axiom Healthcare Suite 2020.3 Release Notes** for considerations before upgrading.

When upgrading to the 2020.3 version of Axiom Comparative Analytics, keep in mind the following:

- Along with upgrading to Axiom 2020.3, you will also need to upgrade to Axiom Comparative Analytics 2020.3.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- This product upgrade contains updated templates, calculation methods, and remediated defects.
- Syntellis delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any Syntellis delivered report that was moved to a new location will automatically move back to its original location.
- Syntellis product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

Preparing and scheduling upgrades

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.

2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) 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:

   - Desired Axiom platform version.
   - Desired Axiom for Healthcare product and version.
   - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Syntellis can do this.
   - Propose an approximate two-hour downtime window when Syntellis can apply update(s) 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 needed to enable features for this version.

Getting help and training

Syntellis provides world-class resources at your fingertips 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 will only open for products you are licensed to use.
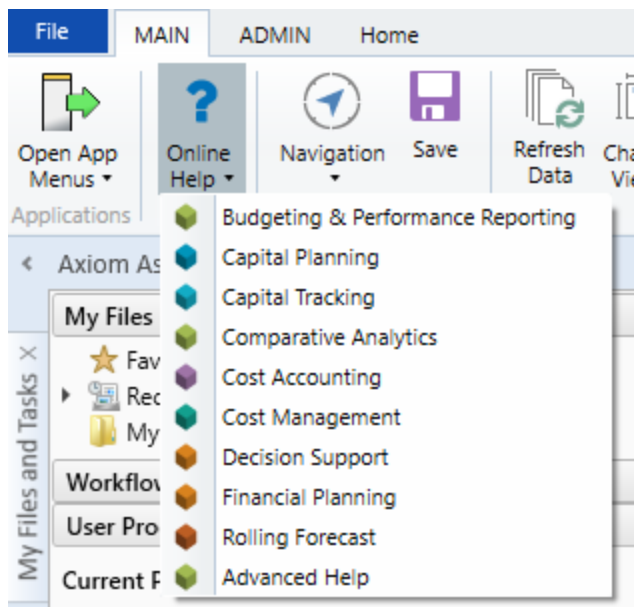
- **Form/Web pages** – Form/web-enabled features and products include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right corner of the screen. 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 Comparative Analytics platform and suite of products. Using Syntellis Central, you can:Search help across all Axiom productsAccess tips, tricks, and best practices in our knowledge baseFind training & certification content

including on-demand, video, webinars, labs, and instructor-led coursesSubmit a support issue, find suggested content, and manage any outstanding issues directly with usReview open Software Service project status and details

Issues resolved in 2020.3

The following table lists the resolutions for issues addressed in 2020.3:

Issue	Description
Department Improvement Opportunity - "Wage Rate" section is supposed to be called "Average Hourly Rate".[TFS 55428]	**Symptom:** Within the Department Improvement Opportunity report, there is currently a section called "Wage Rate". This needs to be changed to "Average Hourly Rate". **Resolution:** Corrected by updating the description for the Wage Rate drill category.
Update calculation algorithm so that ActualValue matches the highest possible percentile [TFS 52611]	**Symptom:** The percentile calculation was set up such that the ActualValue of a DeptMetric record would drop into a lower percentile, if it was the exact same number as the percentile. **Resolution:** Corrected by updating percentile so that it matches the highest percentile of the DeptMetric ActualValue.
Expense Investment Improvement Opportunity report - KPIs using entities with no KHA Watch scores [TFS 52612]	**Symptom:** The Expense Improvement Opportunity report is using entities in the KPIs that aren't showing up in the Entity slicer list. **Resolution:** Corrected by updating filters and KPI visuals.
Expense Improvement Opportunity Dashboard slicers make choices available for options that do not exist (2020.3)[TFS 50545]	**Symptom:** Expense Improvement Opportunity dashboard has options where no data exists. Selecting these options does not result in updated values. **Resolution:** Corrected by updating filters.
Comparative Analytics - Jobcode and Salary data is being shown in Data Explorer with just the DEPT role [TFS 51454]	**Symptom:** Data explorer was only secured using the Comparative Analytics Department Role. **Resolution:** To see Jobcode data, the Comparative Analytics-Jobcode role needs to be applied to users who can see Jobcode level data and filters applied to the JobcodeMeteric and JobcodeMetricPeerGroupPercentile tables in the AITables. To see Salary data, the Comparative Analytics-Salary role needs to be applied to users who can see Salary level data and filters need to be applied to the SalaryMeteric and SalaryMetricPeerGroupPercentile tables in the AITables.

Issues resolved in 2020.3.1

No client facing issues were addressed in this release.

Issues resolved in 2020.3.2

No client facing issues were addressed in this release.

Issues resolved in 2020.3.3

No client facing issues were addressed in this release.

Issues resolved in 2020.3.4

The following table lists the resolutions for issues addressed in 2020.3.4, released on January 11th, 2021:

Issue Description	Description
Entity Performance Report Budget Variance calculation is not working correctly [TFS 73035]	**Symptom:** The formulas that calculate the Budget Var % and 3 Mo Avg Var % columns in the Entity Performance report are not returning the correct formulas in cases where the denominator is negative. **Resolution:** Corrected by updating the measure template for VarianceFromActualPctNoPolarity and changing the DAX formulas in the EntityBenchmark table.

Issues resolved in 2020.3.5

No client facing issues were addressed in this release.

Issues resolved in 2020.3.6

No client facing issues were addressed in this release.

Issues resolved in 2020.3.7

No client facing issues were addressed in this release.