Release Notes

Axiom Strategic Financial Planning
Version 2023.1

AXIOM

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About the Release Notes

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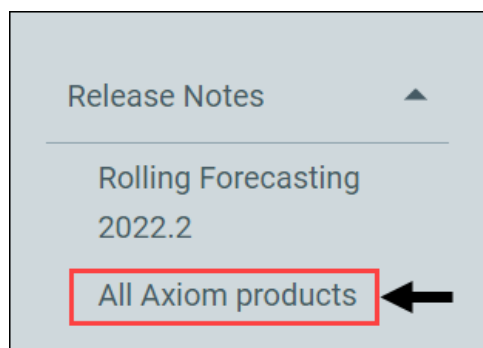
The purpose of these release notes is to provide you with the following:

- 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 Strategic Financial Planning 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 Strategic Financial Planning delivers the following new features and enhancements for Release 2023.1:

- New Composite Financial Index KPI
- New Initiative Dashboard
- Ability to create new accounts with multiple dependent accounts
- Additional information on Scenario and Initiative pages
- Additional flexibility in editing dimensions after beginning the SFP Actuals load

New Composite Financial Index

The Composite Financial Index is a common measurement of financial health in the Higher Education industry. All reports and dashboards that report SFP ratios and KPIs now include the Composite Financial Index.

You can configure and report on four ratios that comprise the Composite Financial Index:

- Primary Reserve ratio
- Viability ratio
- Return on Net Assets ratio
- Net Operating Revenues ratio

Use the Accounts page in the Command Center to configure which accounts comprise the metrics that information these ratios.

The Composite Financial Index is calculated automatically for historical data when you load Actuals. The corresponding value is displayed on the Home page. In addition, the Composite Financial Index is calculated by plan year for each scenario on the Ratios & KPIs tab.

New Initiative Dashboard

Use the Initiative Dashboard to analyze the individual impact from each initiative within a scenario. When performing this analysis, you can specify the impact on Operating Revenue or review the overall impact to Net Operating Results.

Create accounts with multiple dependent accounts

Previously, you could determine how plan values were calculated using the **Percent Of** calculation method to configure a single account on which another account was dependent. With this release, you can now configure the account to be a percentage of the sum of multiple accounts. You can continue to configure accounts on the same Accounts page within the Command Center.

Additional information on Scenario and Initiative pages

The Scenario and Initiative Groups pages now display additional contextual information. The Scenario Groups page displays the driver selections and number of initiatives in each scenario. The Initiative Groups page now displays the driver selection and number of scenarios in which each initiative is included.

Additional flexibility in editing dimensions after beginning the SFP Actuals load

Previously, you could not edit dimensions if the SFP Admin made any entries in the Data Collection Utility to save SFP Actuals. With this release, you can now edit dimensions if the most recent Actual year has $0 in all values, which provides you with a more effective window to edit dimensions during rollovers, if necessary.

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 the Axiom 2023.1 before the first product upgrade. Refer to the **Axiom 2022.4 Release Notes** for considerations before upgrading.

When upgrading to the 2023.1 version of Axiom Strategic Financial Planning, note the following:

- 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 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 Strategic Financial Planning 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 Axiom Strategic Financial Planning defects were addressed in the 2023.1 release.

Issue	Description
159301	**Issue: Debt instrument Current Portion versus Borrowings**. An error existed in the logic that evaluated the Current Portion of a debt instrument versus the user's Borrowings entry. **Resolution:** This logic now correctly evaluates the *project to date* values of Current Portion versus Borrowings entries instead of incorrectly evaluating these values within an individual year.
146987	**Issue: Counter is not updated in Command Center**. The counter that displayed the number of configured accounts did not correctly update data after a new account was created. **Resolution:** The counter is now updated correctly after a new account is created.
156773	**Summary: Statistic description could not be updated**. The logic that evaluated the statistic description always presented an error if users changed the description. **Resolution:** The logic was revised to allow users to update the Statistic description.