

Release Notes

Axiom Strategic Financial
Planning
Version 2023.4

AXIOM

320 N Sangamon St
Suite 700
Chicago, IL 60607
(847) 441-0022
www.syntellis.com
info@syntellis.com

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Contents

- About the Release Notes 4
- What’s new in version 2023.4 5
- What to know before upgrading 7
- Prepare and schedule upgrades 8
- Get help and training 9
- Issues fixed in 2023.4 10

About the Release Notes

Syntellis is pleased to announce the 2023.4 release of Axiom Strategic Financial Planning. 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:

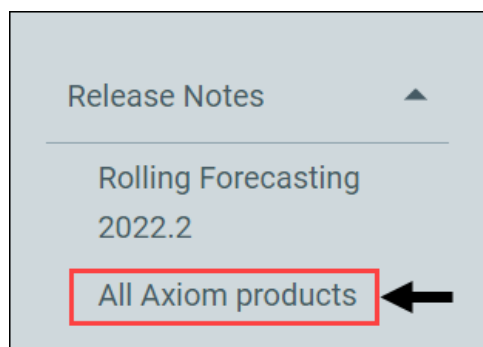
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

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 Strategic Financial Planning!

This release of Axiom Strategic Financial Planning includes the following new features and enhancements:

► "From Utility" calculation method

You can now configure non-reserved SFP accounts to use a new "From Utility" calculation method.

| Account | Description | Actions | Status | Calculation method | Dependent account | Spends... | Operat... | Operat... | Operat... | Debt pri |
|---------|------------------|---------|--------|--------------------|-------------------|-----------|-----------|-----------|-----------|----------|
| 510001 | Faculty Salaries | | Active | From Utility | | Exclude | Exclude | Include | Exclude | Exclude |
| 510002 | Staff Salaries | | Active | From Utility | | Exclude | Exclude | Include | Exclude | Exclude |

SFP accounts that use the "From Utility" calculation method now display a read-only line within the scenario that returns existing plan data from the SFP Scenario Details table.

| | Actual | | Plan | | | | |
|---------------------------|------------|------------|------------|------------|------------|------------|------------|
| | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| Salaries and Wages | | | | | | | |
| Faculty Salaries | | | | | | | |
| Unmapped | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Unrestricted | | | | | | | |
| Total | 34,052,153 | 34,057,811 | 34,057,811 | 34,057,811 | 34,057,811 | 34,057,811 | 34,057,811 |
| Restricted | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total faculty salaries | 34,052,153 | 34,057,811 | 34,057,811 | 34,057,811 | 34,057,811 | 34,057,811 | 34,057,811 |
| Staff Salaries | 6,778,033 | 7,435,685 | 7,435,685 | 7,435,685 | 7,435,685 | 7,435,685 | 7,435,685 |
| Total salaries and wages | 40,830,186 | 41,493,495 | 41,493,495 | 41,493,495 | 41,493,495 | 41,493,495 | 41,493,495 |
| Fringe Benefits | | | | | | | |
| Benefits | 13,707,014 | 13,084,321 | 165,974 | 165,974 | 165,974 | 165,974 | 165,974 |
| Total fringe benefits | 13,707,014 | 13,084,321 | 165,974 | 165,974 | 165,974 | 165,974 | 165,974 |

With this calculation method, SFP does not include any productized tools to save scenario data to an SFP account. This configuration option supports those who want to plan specific SFP accounts using their own logic in an extension utility instead of an out-of-the-box calculation method. No extension utilities are included in the product or in the implementation by default, but you may request to have the development of an extension utility added to the scope of their implementation.

► Allow historical columns to represent historical budget instead of actuals

As a best practice, Syntellis recommends using historical actuals as the basis for generating plan data in SFP. However, you can now configure historical columns to display budget data instead of actuals, if this basis is more suitable for the institution. An additional configuration exists in Settings to support this

option.

Settings

Financial plan period

Institution name
Axiom University

Base year (first plan year)
2024

Historical columns display
☐ Display actuals ☒ Display budget

Years of historic actuals/source data
2

Years of plan data
5

Regardless of the dataset that historical columns were configured to represent, you can still populate historical data using the data collection utility. However, the data collection utility, as well as all scenarios and reports, display either “Budget” or “Actuals” in historical columns to align with the your configuration decision and promote clarity with end-users.

| Data Collection Utility | | | | | | | |
|--------------------------------------|-------------|---------------|------------|-----------------|--------------|------------|--------------|
| Enter financial statement data | | | | | | | |
| STATEMENT OF ACTIVITIES | INVESTMENTS | BALANCE SHEET | STATISTICS | MOODY'S HISTORY | PEER HISTORY | TARGETS | |
| | | 2022 | | 2023 | | | |
| Description | | Unrestricted | Restricted | Total | Unrestricted | Restricted | Total |
| ▼ PORTLAND CAMPUS | | | | | | | |
| Revenue | | | | | | | |
| Tuition and Fees | | | | | | | |
| Undergraduate Tuition | | 167,776,250 | 0 | 167,776,250 | 156,791,628 | 0 | 156,791,628 |
| Graduate Tuition | | 50,130,105 | 0 | 50,130,105 | 50,340,498 | 0 | 50,340,498 |
| Fees | | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Tuition and Fees | | 217,906,355 | 0 | 217,906,355 | 207,132,126 | 0 | 207,132,126 |
| Scholarships and Financial Aid | | | | | | | |
| Undergraduate Financial Aid | | (79,222,826) | 0 | (79,222,826) | (72,737,436) | 0 | (72,737,436) |
| Graduate Financial Aid | | (13,916,071) | 0 | (13,916,071) | (15,476,452) | 0 | (15,476,452) |
| Total Scholarships and Financial Aid | | (93,138,897) | 0 | (93,138,897) | (88,213,882) | 0 | (88,213,882) |

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 Strategic Financial Planning, 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:

[Syntellis Central](#) provides centralized self-service content and resources for the 2023.3 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 on November 13, 2023:

| Item | Description |
|--|--|
| Statistics does not query in Actual 3-5 in multi-year report. [#73431] | Summary: Historical columns 3-5 did not populate historical statistics entries within the multi-year report. Resolution: The query was updated to correctly include all historical columns for statistics data. |
| Statistics do not show department breakout when drilling in multi-year statement [#73435] | Summary: Statistics data did not populate correctly when drilling from the multi-year report. Resolution: The logic within the drill was updated to populate all data correctly. |
| Year 10 within Capital calculates inconsistently with other plan years [#75442] | Summary: Depreciation did not correctly calculate Year 10 within the Capital tab within Scenarios. Resolution: The logic of this column was corrected to align with calculations for Years 1-9. |
| CFI in Actuals does not tie to CFI as calculated within scenario [#75591] | Summary: The Composite Financial Index (CFI) calculation omitted impacts from Endowment and Other Investments. Resolution: The CFI calc was updated to include the impact of Endowment and Other Investments. |