

Release Notes

Axiom Tuition Revenue Planning
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 made of two parallel lines, one light blue and one light purple. The background of the entire page is dark blue with a pattern of overlapping circles in various shades of blue and purple.

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 9
- Prepare and schedule upgrades10
- Get help and training 11
- Issues fixed in 2023.4 12

About the Release Notes

Syntellis is pleased to announce the 2023.4 release of Axiom Tuition Revenue 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:

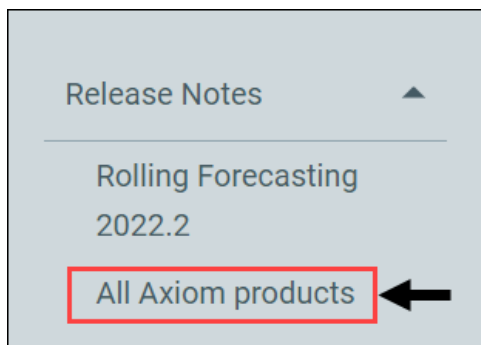
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

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 Tuition Revenue Planning!

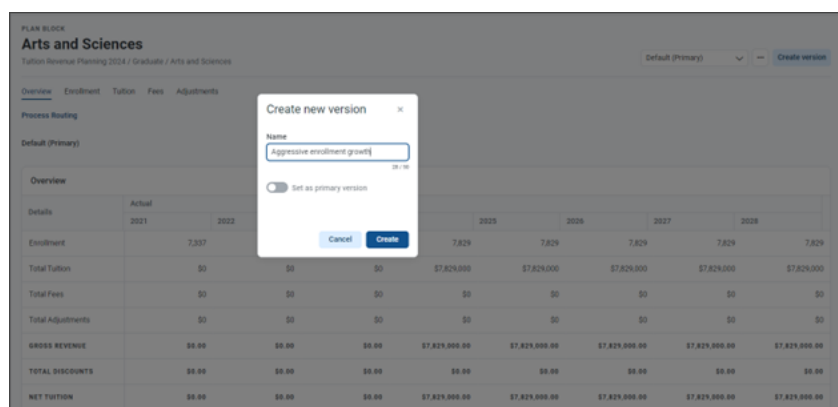
This release of Axiom Tuition Revenue Planning includes the following new features and enhancements:

► Create tuition versions

You can now create versions within each plan block. By default, a primary version is created for each plan block when you lock plan block configurations, which is the version used in all consolidated reporting.

You can:

- Create new versions.
- Delete outdated versions.
- Set a newly created version as the primary version.



► New Consolidation report

Use the consolidation report to view the following data for any individual plan block or branch of the planning hierarchy:

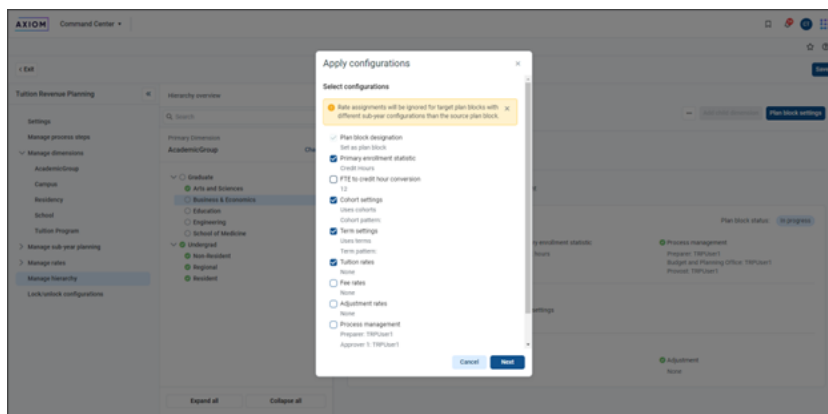
- Enrollment
- Tuition
- Fees
- Adjustments

The report includes data from the primary version of each plan block.

Consolidation Report									
Budget Year 2024									
Plan Block Tab	Actual 2021	Actual 2022	Actual 2023	Plan 2024	Plan 2025	Plan 2026	Plan 2027	Plan 2028	
ENROLLMENT									
Credit Hours	235,380	242,655	244,365	244,365	244,365	244,365	244,365	244,365	
FTE	16,311	16,784	16,869	16,889	16,889	16,889	16,889	16,889	
TUITION REVENUE									
Credit Hours				\$35,868,000	\$35,868,000	\$35,868,000	\$35,868,000	\$35,868,000	
FTE				\$400,548,000	\$400,548,000	\$400,548,000	\$400,548,000	\$400,548,000	
TOTAL TUITION REVENUE				\$436,416,000	\$436,416,000	\$436,416,000	\$436,416,000	\$436,416,000	
> FEES				\$99,298,000	\$99,298,000	\$99,298,000	\$99,298,000	\$99,298,000	
> TUITION ADJUSTMENTS				\$0	\$0	\$0	\$0	\$0	
GROSS REVENUE				\$535,714,000	\$535,714,000	\$535,714,000	\$535,714,000	\$535,714,000	
DISCOUNTS				\$0	\$0	\$0	\$0	\$0	
NET TUITION				\$535,714,000	\$535,714,000	\$535,714,000	\$535,714,000	\$535,714,000	

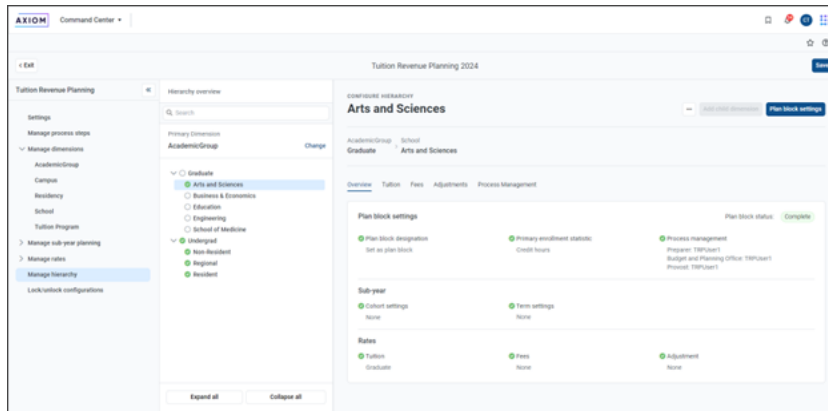
► Allow bulk application of plan block configurations to other hierarchical nodes

When configuring the hierarchy, the TRP administrator can now apply one or more configurations from a “source” plan block to one or more target nodes of the hierarchy. This functionality saves time and reduces errors when setting up plan blocks with common configurations.



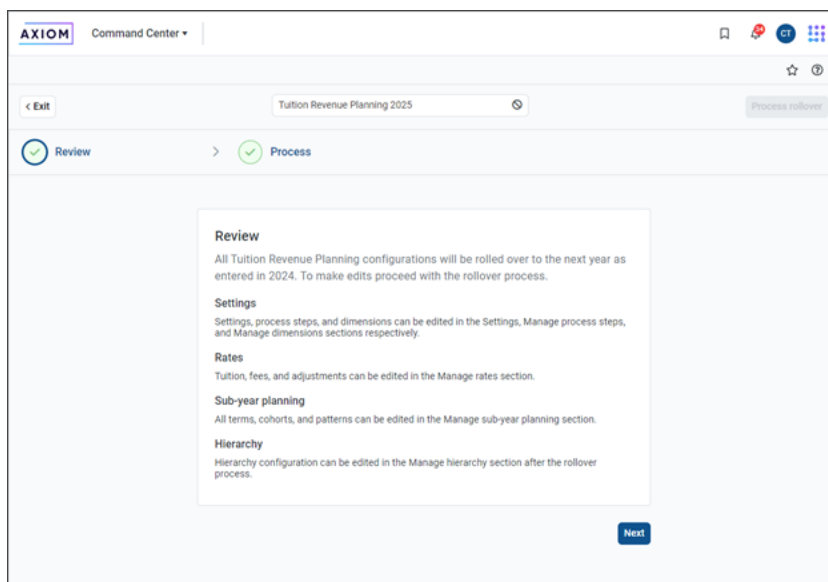
► Hierarchy configuration checks

Plan blocks now display a symbol when they contain valid selections for all plan block configurations. Additionally, the **Overview** tab within the Manage hierarchy page displays which configurations are still required before you can finalize and lock plan block configurations. After all plan blocks display a green check mark next to the plan block description, the TRP administrator can lock hierarchy configurations and transition to planning mode.



► New web-based rollover process

Tuition Revenue Planning now supports a guided web-based rollover process. The system rolls over all configurations from the initial plan year to the subsequent plan year. After the rollover, users can make any changes that are relevant to the subsequent plan year.



► New Overview tab within Planning

Each plan block now includes an **Overview** tab that displays a consolidated summary of the plan data for the selected plan block. You can view the following data for the plan block in one location:

- Enrollment
- Tuition
- Fees
- Adjustments

You can also view financial metrics, including:

- Gross Revenue
- Total Discounts
- Net Tuition

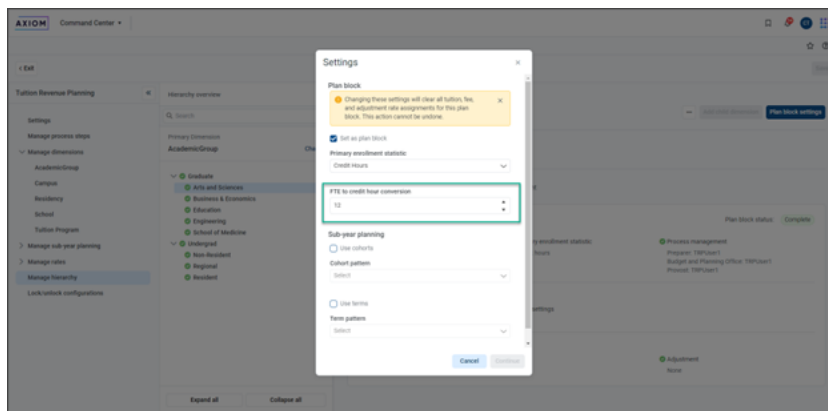
The screenshot displays the 'Tuition Revenue Planning 2024' interface. On the left, a sidebar lists 'Plan blocks' including Graduate, Undergrad, and Non-Resident. The 'Non-Resident' block is selected, showing a table of financial metrics. The table has columns for 'Actual' (2021-2023) and 'Plan' (2024-2028). The rows include Enrollment, Total Tuition, Total Fees, Total Adjustments, Gross Revenue, Total Discounts, and Net Tuition.

	Actual	2021	2022	2023	Plan	2024	2025	2026	2027	2028
Enrollment		68,878	71,354	\$1,829	\$1,829	\$1,829	\$1,829	\$1,829	\$1,829	\$1,829
Total Tuition		\$0	\$0	\$0	\$155,875,000	\$155,875,000	\$155,875,000	\$155,875,000	\$155,875,000	\$155,875,000
Total Fees		\$0	\$0	\$0	\$54,756,000	\$54,756,000	\$54,756,000	\$54,756,000	\$54,756,000	\$54,756,000
Total Adjustments		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Gross Revenue		\$0.00	\$0.00	\$0.00	\$210,631,000.00	\$210,631,000.00	\$210,631,000.00	\$210,631,000.00	\$210,631,000.00	\$210,631,000.00
TOTAL DISCOUNTS		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NET TUITION		\$0.00	\$0.00	\$0.00	\$210,631,000.00	\$210,631,000.00	\$210,631,000.00	\$210,631,000.00	\$210,631,000.00	\$210,631,000.00

► Configure “FTE to Credit Hour” rate by plan block instead of globally

Users can now configure the FTE to Credit Hour conversion rate on a plan block basis. The configuration on the Settings page that previously established this value now functions as a default value for the plan block configuration.

This conversion rate is used in plan blocks to convert the primary enrollment metric to other enrollment metrics, if tuition, fee, or adjustment rates are based on the other enrollment metrics.



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 Tuition Revenue 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

No client-facing issues were addressed in 2023.4, released on November 13, 2023.