Release Notes

Axiom Capital Tracking
Version 2020.3.2

AXIOM

10 S. Wacker Dr, Suite 3375
Skokie, IL 60077
(847) 441-0022
www.syntellis.com

info@syntellis.com

Syntellis® is a trademark of Syntellis Performance Solutions, LLC. Microsoft®, Excel®, and Windows® are trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners.

Version: 2020.3.2

Updated: 10/29/2020

Contents

About the Release Notes

Syntellis is pleased to announce the 2020.3 release of Axiom Capital Tracking. 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 Capital Tracking online help. On the help home page, simply click the Release Notes link at the top of the page.

New features in 2020.3

While no new functionality has been added or enhanced in Axiom Capital Tracking 2020.3, it does deliver fixes to previous issues. For more information, see Issues fixed in 2020.3.

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 Capital Tracking, keep in mind the following:

- 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.
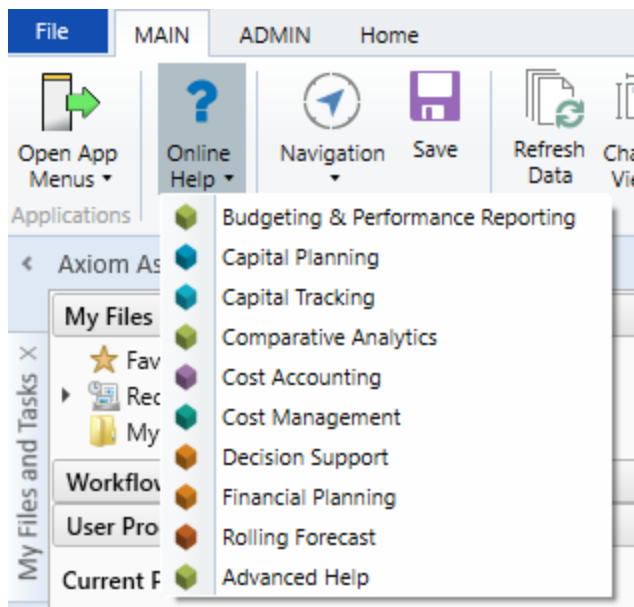
- **Form/Web pages** – Form/web-enabled features and products include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the 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 Capital Tracking 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 & 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 us
- Review open Software Service project status and details

Issues fixed for 2020.3.1

The following tables list the resolutions for issues addressed in 2020.3.1, released on October 12th, 2020:

Excel and Web systems

No issues addressed in this release.

Web system only

Issue	Description
PFB-09055 - Pro Forma OP %Chg Reimb [TFS 51557]	**Issue:** If the Pro Forma Threshold template is set to exclude IP Ancillary volume, the system also excludes part of OP. When a user selects a % of OP charges reimbursement methodology in the pro forma, no input appears to populate a percentage. The Hide/Show for OP partially refers to the visibility settings for IP Ancillary. **Resolution:** Corrected by changing the formula in the FinInputs tab of the FinInputs calc method to reference AI28 in column Y row 1026.
PFB-08991 - Manual Invoice and PO Entries CT Utilities [TFS 50096]	**Issue:** When a fiscal year starts in January, the GLPeriod recorded from the Manual Invoice Entry or Manual Journal Entry utility does not reflect the correct fiscal year. **Resolution:** Corrected by updating the GLPeriod calculation to reflect the correct fiscal year.

Excel system only

No issues addressed in this release

Issues fixed for 2020.3.2

No client-facing issues addressed in 2020.3.2, released on November 9th, 2020.