Release Notes

Axiom Capital Planning
Version 2020.4

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2020.4 release of Axiom Capital 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 Capital Planning online help. On the help home page, simply click the Release Notes link at the top of the page.

New features in 2020.4

Axiom Capital Planning 2020.4 delivers updated enhancements to the usability of working with capital projects.

Use Excel to enter financial input values into Threshold projects

Instead of using the Threshold project web form, you can enter financial input and balance sheet values using the Excel Pro Forma utility. This gives you all of the functionality of Excel for greater control when auditing and viewing the formulas used to calculate project budget values.

Use Excel to enter financial input values into Threshold (Pro Forma) projects

▶ Why use this feature

Instead of using the Threshold (Pro Forma) project web form, you can enter financial input and balance sheet values using the Excel Pro Forma utility. This gives you all of the functionality of Excel for greater control when auditing and viewing the formulas used to calculate project budget values.

Hemodialysis Unit Blood Pump

Project ID: CP_Pending_16 | CAPREQ: 16 | Sheet: 1600 - Financial Inputs | Project Type: Dialysis | Department: 8 (Test Dept) | Status: Pending

		2025	2026	2027	2028	2029	2030	2031	2032
Capital Additions									
Depreciation Methodology	1/2 Year Depreciation								
Equipment	Useful Life								
test	11								
Additions		2,000	200	20	2	0	0	0	0
Additions Adjustments									
Capitalization		2,000	200	20	2	0	0	0	0
Work in Progress		0	0	0	0	0	0	0	0
Depreciation - New		91	100	10	1	0	0	0	0
Depreciation - Drop Off		0	0	0	0	0	0	0	0
Total Depreciation		91	191	201	202	202	202	202	202
Moveable Equipment	Useful Life								
This is a new description test	160								
Additions		0	0	0	0	0	0	0	0
Additions Adjustments									
Capitalization		0	0	0	0	0	0	0	0
Work in Progress		0	0	0	0	0	0	0	0
Depreciation - New		0	0	0	0	0	0	0	0
Depreciation - Drop Off		0	0	0	0	0	0	0	0
Total Depreciation		0	0	0	0	0	0	0	0

▶ How this feature works

What: The Excel Pro Forma utility allows you to enter financial and balance sheet data using Excel functionality quickly and easily.

Systems: Web only

Where: A link to the utility displays in the Threshold (Pro Forma) project template.

> **NOTE:** This feature will not display if a user is assigned a role profile that has read-only permission to plan files or if someone else has the plan file open and has Save Lock enabled.

Who: Users assigned the Capital Planning/Tracking Administrator or Capital Planning/Tracking User role profile can use this feature.

How: In the **Financial > Financial Input** tab of the plan file, click **Enter inputs using Excel**. Enter values in the Financial and the Balance Sheet tabs of the worksheet.

▶ Where to find more information

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

- "Entering financial input values in Threshold (Pro Forma) projects using Excel"

What to know before upgrading

> **IMPORTANT: You must apply the Axiom 2020.4 upgrade before applying any 2020.4 Axiom product upgrades.** Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2020.4 before the first product upgrade. Refer to the **Axiom 2020.4 Release Notes** and **Axiom Healthcare Suite 2020.4 Release Notes** for considerations before upgrading.

When upgrading to the 2020.4 version of Axiom Capital Planning, 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
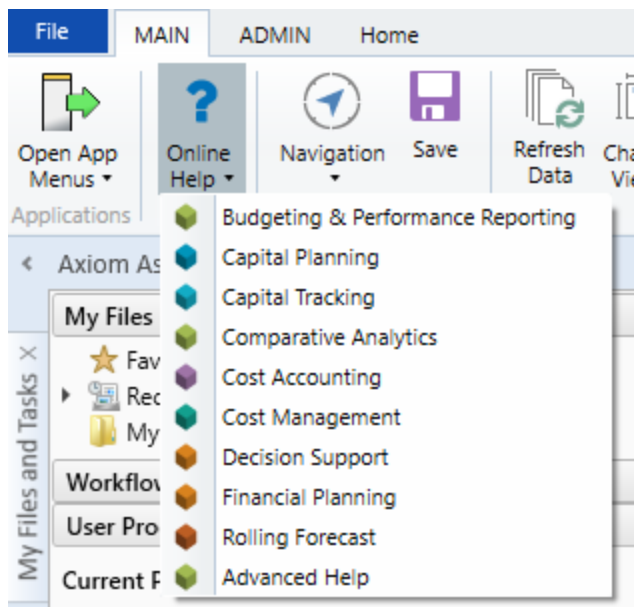
Summary of the upgrade process:

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 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 & 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 in 2020.4.1

The following tables list the resolutions for issues addressed in 2020.4.1, released on January 11th, 2021:

Excel and Web systems

No issues addressed in this release.

Web system only

No issues addressed in this release.

Excel system only

Issue	Description
PFB-07960 - PR (Legacy) - Item not cascading down for multi-line purchase requests [TFS 51557]	**Issue:** The depreciation cost centers (generalized as 'Item #' by default) need to be manually selected for each purchase request line item. Previously, the value would cascade through each line item if the first line had a value selected. **Resolution:** Corrected by updating the formula in column AE of the LineItemDetail calc method to cascade the value through each line item.