Release Notes

Axiom Capital Planning

Version 2021.2

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2021.2 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 2021.2

Axiom Capital Planning 2021.2 delivers updated enhancements to the usability of working with capital projects.

Project ranking report is now a form

You can now enter your personal manager or executive ranking values in a form-based system.

Total requested and Creator now available for easy reference in plan file header

You can now view the total amount requested for a project and the name of the person who created the project at any time for easy reference in the plan file header.

Delete sheet from pro forma

You can now delete any additional sheet(s) and all accompanying data from pro forma, but not the original sheet.

Extend NPV option to 100 years

You can now add up 100 years to the total project life to extend financial modeling into perpetuity.

Warning when project total = $0.00

You will now see a warning message when you save a capital project with a total requested amount of $0.00.

Project Ranking report updated to web form

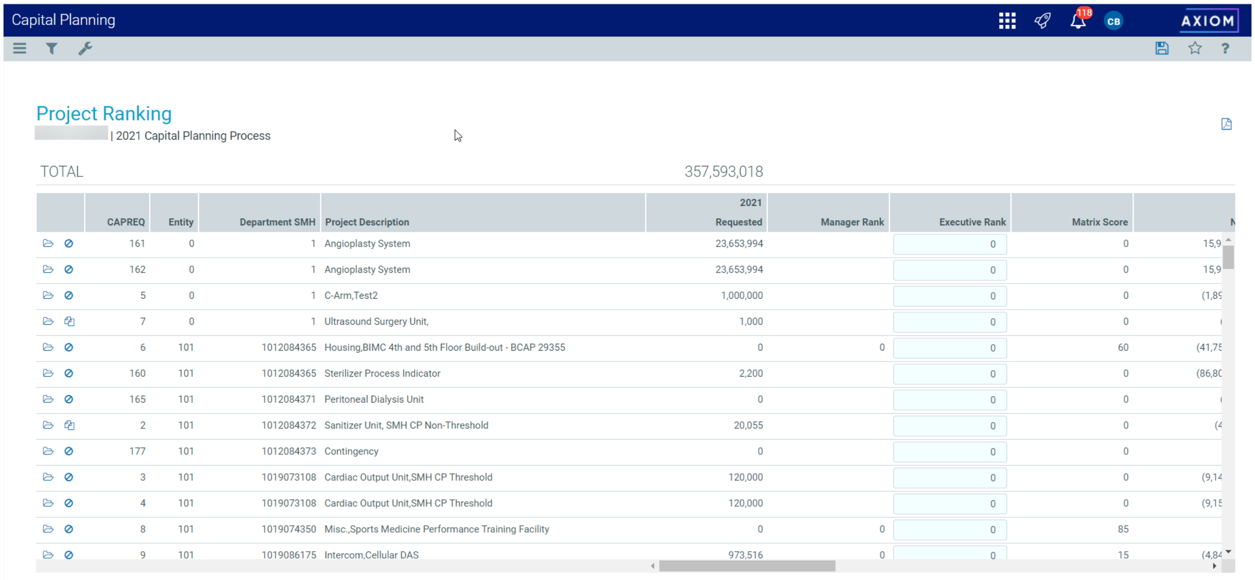
The Project Ranking report has been converted to a web form for ease of viewing and usability.

▶ About this enhancement

Where: From the **Capital Planning** home page, click **Project Ranking Report**.

Who: Users must be assigned the Capital Planning/Capital Tracking Admin role profile in the system.

How: The feature works the same as in prior versions. You now have the option to add more questions. The Executive Rank column is only visible if the user is in the Capital Planning Approver or Capital Tracking Approver role, respectively.



Example of the new web version of the Project Ranking report

▶ Where to find more information

For more information and instructions, see the following topic in the Axiom Capital Planning online help:

- "Ranking capital projects"

Updated project header information

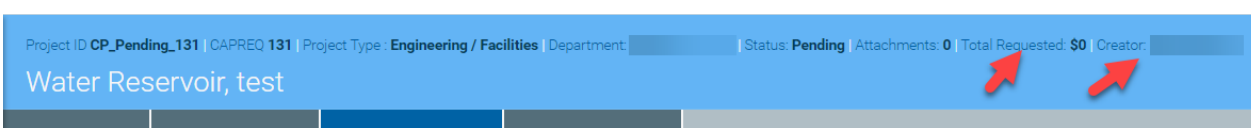
The capital project header now includes information on the total amount requested and project requestor name.

▶ About this enhancement

Where: From the **Capital Planning** home page, click **Project Ranking Report**.

Who: Any user with Axiom Planning and/or Axiom Tracking role profiles.

How: When opening a capital project, the header for the project displays the Total Requested and Creator fields. For purchase requests, the header shows the Total Purchase Request.



Example of the updated project header information

▶ Where to find more information

For more information and instructions, see the following topic in the Axiom Capital Planning or Capital Tracking online help:

- Creating a new capital project (web)
- Creating a purchase request

Delete additional sheets from Threshold (pro forma) projects

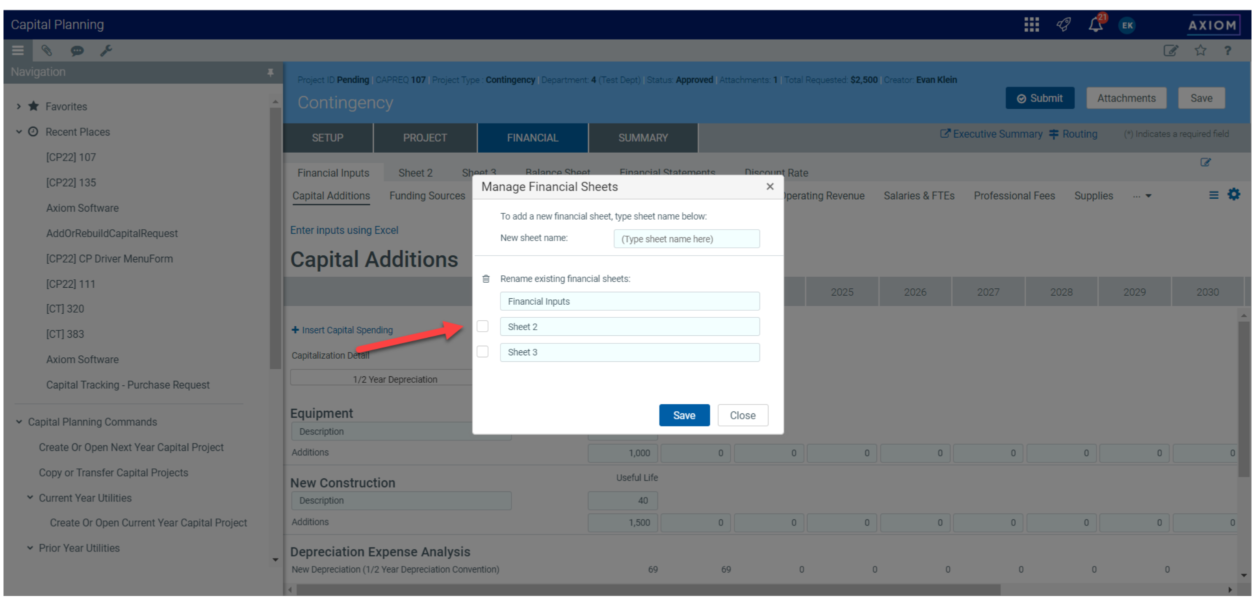
Users can delete additional sheets added to a pro forma project but not the original sheet itself.

▶ About this enhancement

Where: Open any Threshold project that includes sheets that have been added to the project.

Who: Any user with Axiom Planning Admin role profiles.

How: When opening a capital project, click the notepad icon in the upper left corner of the page. In the **Manage Financial Sheets** dialog, select the check box next to the sheets to delete, and click **Save**.



The system displays the list of additional sheets, which a user can select for deletion

▶ Where to find more information

For more information and instructions, see the following topic in the Axiom Capital Planning or Capital Tracking online help:

- "Deleting sheets from a Threshold (pro forma) project"

Extend modeling up to 100 years

In the Financial > Financial Statements tab, the Total Project Life of NPV has been updated to allow users to add up to 100 years to the total project life to mimic perpetuity.

About this enhancement

Where: Open a Threshold project.

Who: Any user with Axiom Planning role profiles.

How: The feature works the same as in prior versions. You now have the option to add up to 100 years for a project, this allows for near perpetuity while retaining the ability to add capital in future years.

> **NOTE:** System displays an error when entering more than 100 years in the **Total Project Life for NPV** field.

Where to find more information

For more information and instructions, see the following topic in the Axiom Capital Planning online help:

- "Creating data for Threshold (pro forma) projects"
- "Entering performance tracking measures in a Threshold project"

Warning displays when project total is zero

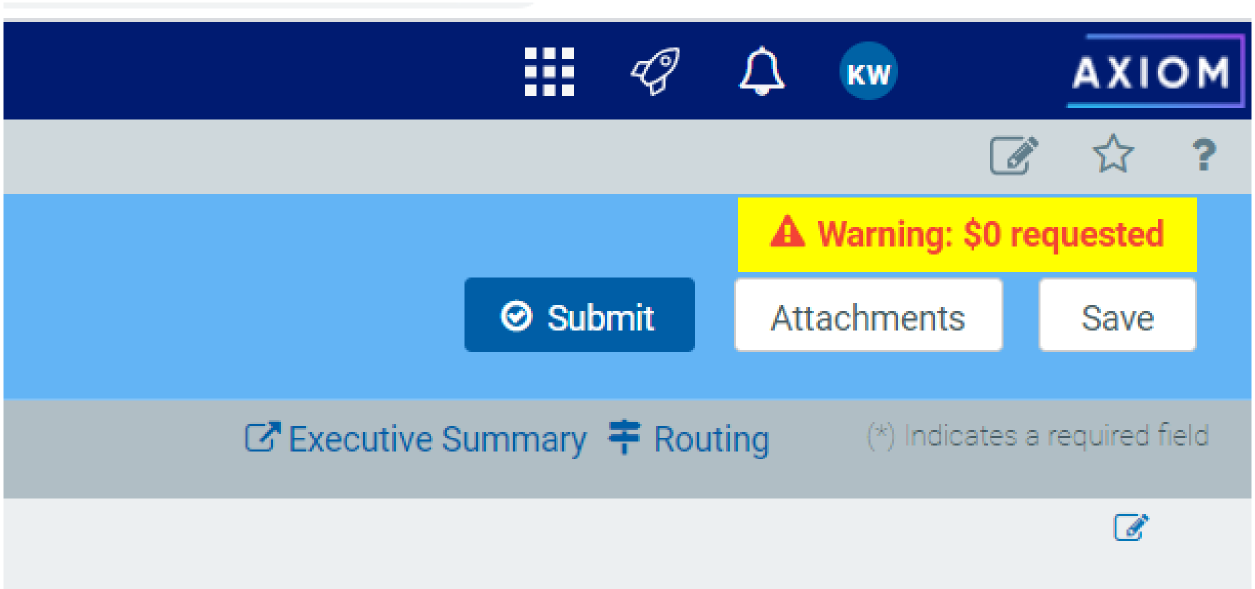
Axiom now displays a warning when a project has a total value of zero so that users a reminded to enter a value before submitting the project.

About this enhancement

Where: Open a project.

Who: Any user with Axiom Planning role profiles.

How: The warning displays in the upper left corner of the page.



Warning displays above Attachments and Save buttons.

What to know before upgrading

IMPORTANT: You must apply the Axiom 2021.2 upgrade before applying any 2021.2 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2021.2 before the first product upgrade. Refer to the **Axiom 2021.2 Release Notes** and **Axiom Healthcare Suite 2021.2 Release Notes** for considerations before upgrading.

When upgrading to the 2021.2 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:

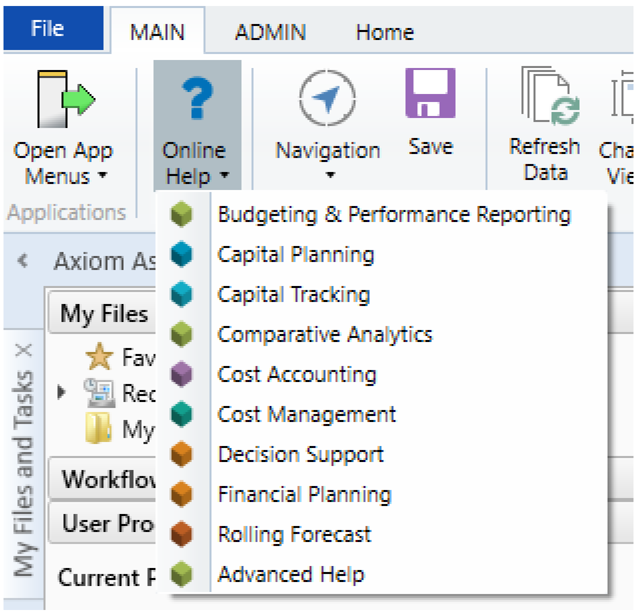
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a support ticket to schedule an installation 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 2021.2

The following tables list the resolutions for issues addressed in 2021.2, released on August 16th, 2021:

Excel and Web systems

No issues addressed in this release.

Web system only

Issue	Description
PFB-07790 - Cap Tracking Security Update report [TFS 37458]	**Issue:** The Capital Tracking Security Update report updates without checking whether or not users are authorized users in the Capital Planning system. **Resolution:** Corrected by adding a clause in the Save tag logic so that the Cap Tracking Security Update report will now only save changes made by authorized users.
CT Web with CP Legacy Issues [TFS 52871]	**Issue:** When users try to transfer non-threshold plan files from Capital Planning legacy to Capital Tracking, two issues occur: • The system displays an "Error refreshing Axiom Query 'AQ1: Bring in Default Sections' on sheet 'FI_Menu_Component'." error. • Not all fields transfer accurately, and some fields display a zero or an asterisk instead of data from Capital Planning. **Resolution:** Corrected by updating the logic so that when transferring non-threshold plan files from Capital Planning legacy to Capital Tracking, the system no longer displays an error or incorrect field names.

Issue	Description
PFB-09137 - Mixed Web/ Legacy System causes field value issues in Capital Copy Utility [TFS 53857]	**Issue:** When users run the Capital Copy Utility, the department description column title returned a value of zero and the Start Year displays zero, even though the relevant data table contained values pertaining to those fields. **Resolution:** Corrected by adding an error trap so that the department description will default to "Department" when the user has not customized this field name. Now, when a user runs the Capital Copy Utility, the department description column title will display the name determined by the user. In the event that the user has not renamed the column, the system will display the default name of Department. When a user runs the Capital Copy Utility, the Start Year now displays correctly.
PFB-09256 - Number of Attachments formula in CapProjectMaster template [TFS 57374]	**Issue:** The number of attachments for the capital plan file does not calculate correctly in some cases. **Resolution:** Corrected by adding a variable to the Variables tab to pull in the file group ID associated with the plan file. The number of attachments for the capital plan file now calculates properly.
PFB-09288 - CapQuestion size issue [TFS 61727]	**Issue:** When a user customizes one of the capital questions in the Project tab, the text size is too large and some of the added text is not visible on the screen. **Resolution:** Corrected by adding logic to increase or decrease the text size based on the number of characters, so users can customize the Capital Questions in the Project tab and the questions now displays in its entirety.
Error copying Legacy projects to web [84697]	**Issue:** When a user copied a legacy capital project to the web-based system, they received an error. **Resolution:** Corrected by removing hard-coded elements so that the system no longer displays an error when the user copies a project.

Issue	Description
Transferring Legacy projects to web delete original budget selection doesn't work [TFS 86319]	**Issue:** When users transfers approved projects from legacy to web and set the original budget to zero, the system retains the original budget amount, regardless of user changes. **Resolution:** Corrected by adding the GetData into the utility, which now allows users to successfully transfer approved projects from legacy to web and set the original budget to zero.
Excel Pro Forma Input utility - Data may not query in correctly upon launch [TFS 90221]	**Issue:** Data may not always pull into the Excel Pro Forma Input utility correctly upon launch. Capital Planning data seems to be querying in for the wrong years, while Capital Tracking is not pulling in any data. **Resolution:** Corrected by updating the data lookup tables so that the Excel Pro Forma Input utility now correctly inputs data upon launch.
Capital Planning Dashboard - Data Navigator NPV for each year should be taken out [TFS 90398]	**Issue:** Net Present Value (NPV) does not need to display for each year, only in the Total section. Full Time Employee Impact (FTE Impact) does not need to display in the TOTAL section but should remain in the section for each year. **Resolution:** Corrected by removing NPV from individual year sections and removing FTE impact from the TOTAL section.

Excel system only

No issues addressed in this release.