

Release Notes

Axiom Capital Planning
Version 2021.1

The logo for AXIOM, featuring the word "AXIOM" in a bold, white, sans-serif font. The text is enclosed within a thin, light blue rectangular border that is slightly offset from the text, creating a subtle frame effect.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2021.1 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 2021.1

Axiom Capital Planning 2021.1 delivers updated enhancements to the usability of working with capital projects.

[Add more questions to the Decision Matrix Input Table driver](#)

You can now configure the Decision Matrix Input Table driver to present users with up to 20 drop-down multiple-choice questions to provide additional support with prioritization of requests.

[Projects open to Summary tab after submission](#)

To help you find information faster, the Summary tab now displays by default when opening submitted projects.

[Increased character limit in the Project Justification box](#)

To allow users more space to enter a description for the justification of a project, the character limit in the Project Justification box of the Project > Description tab has been increased from 500 to 2500.

[Refresh variables added to plan file and purchase request directories](#)

To help you narrow down the list of capital project and/or purchase request (Axiom Capital Tracking only) plan files, a new filter option has been added to the plan file directory pages.

[Keep or change the creator and project ID for copied or transferred projects](#)

When copying unapproved Capital Planning projects to a Capital Tracking project or creating a new Capital Tracking project by transferring a Capital Planning project, you can now indicate whether to:

- Keep the original project ID or create a new one.
- Keep the original creator or assign yourself as the creator.

[Report Center and Report Builder](#)

Version 2021.1 introduces phase 1 of our new Report Builder, where you can create reports in the browser using an intuitive drag-and-drop interface. The new Report Center allows you easy access to all of your reports using a centralized hub in the Web Client.

Add more questions to the Decision Matrix Input Table driver

You can now configure the Decision Matrix Input Table driver to present users with up to 20 drop-down multiple-choice questions to provide additional support with prioritization of requests.

▶ About this enhancement

Where: From the Axiom Capital Planning home page, click **Edit Drivers**, or from the Cap Planning Admin task pane, in the **Administration** section, click **Capital Planning Drivers**, and double-click **Capital Planning Drivers**.

Who: Users must be assigned the Capital Planning 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.

▶ Where to find more information

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

- "Creating or modifying decision matrix questions"

Projects open to Summary tab after submission

To help you find information faster, the Summary tab now displays by default when opening submitted projects.

NOTE: Unsubmitted projects still open to the Project tab.

▶ About this enhancement

Where: To open a project, from the Axiom Capital Planning or Capital Tracking home page, click **Create or Open Capital Projects** on the Capital Planning/Capital Tracking side of the page.

Who: Applies to all users.

How: To view a submitted project, in the **Open Existing Capital Project** section, select a project from the drop-down, and click **OK**.

▶ Where to find more information

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

- "Creating or modifying a capital project"
- "Creating or modifying a non-budgeted capital project"

Increased character limit in the Project Justification box

To allow users more space to enter a description for the justification of a project, the character limit in the Project Justification box of the Project > Description tab has been increased from 500 to 2500.

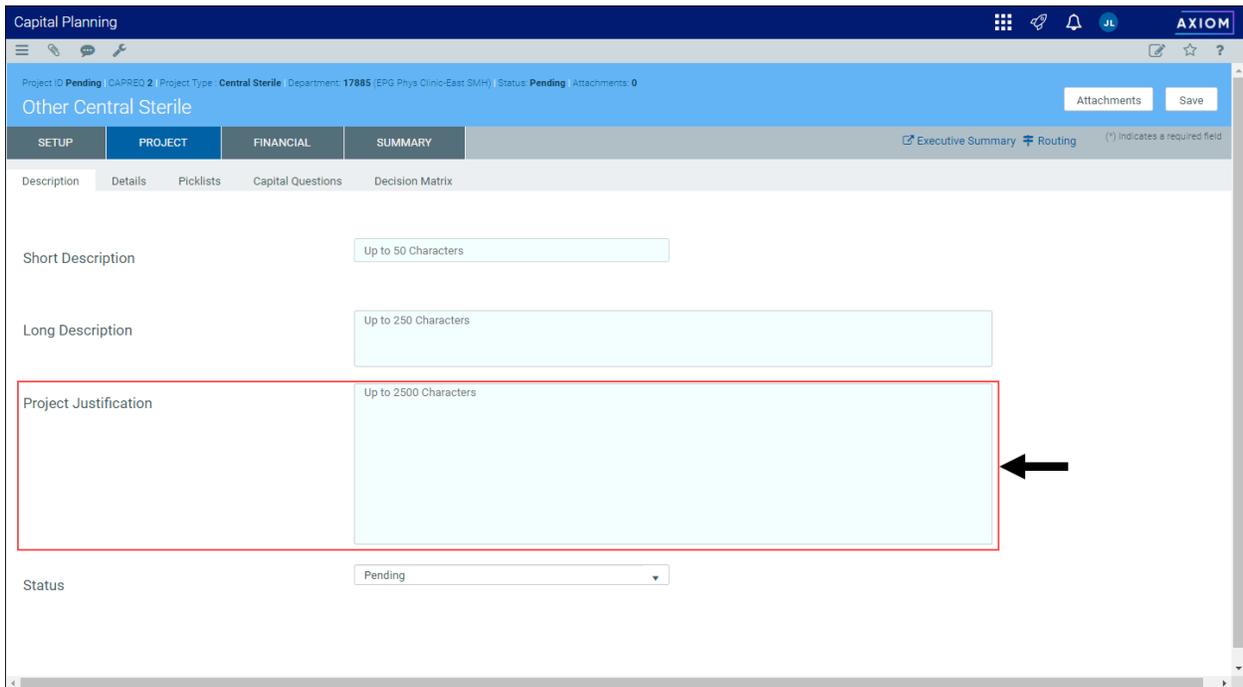
NOTE: This enhancement applies only to the web version of Axiom Capital Planning and Axiom Capital Tracking.

► About this enhancement

Where: To open a project, from the Axiom Capital Planning home page, click **Create or Open Capital Projects**.

Who: Applies to all users.

How: In a project, in the Project > Description tab, enter a description in the Project Justification box.



Web project template displays new character limit in Project Justification box in the Project > Description tab

► Where to find more information

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

- "Creating Non-Threshold (Summary) projects"
- "Creating Threshold (Pro Forma) projects"

Refresh variables added to plan file and purchase request directories

To help you narrow down the list of capital project and/or purchase request (Axiom Capital Tracking only) plan files, a new filter option has been added to the plan file directory pages.

▶ About this enhancement

Where: To open a plan file, from the Axiom Capital Planning or Capital Tracking home page, click **Plan File Directory** on the Capital Planning/Capital Tracking side of the page. To open the list of purchase requests, from the Capital Tracking home page, click **Plan File Directory** on the Purchase Requests side of the page.

Who: Applies to all users.

How: To narrow the list of projects, select the options in which to filter the list in the **Filters** panel, and click **Apply**. To clear a specific option, click **X** next to the drop-down list. To clear the entire filter, click **Clear All**.

▶ Where to find more information

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

- "Viewing project plan files"
- "Viewing project plan files and purchase requests"

Keep or change the creator and project ID for copied projects

When copying capital planning projects, you can now indicate whether to:

- Keep the original project ID or create a new one.
- Keep the original creator or assign yourself as the creator.

These new options are made available under the following circumstances:

- Copying projects within Axiom Capital Planning.
- Copying unapproved projects from Axiom Capital Planning to Axiom Capital Tracking (as a new project).
- Copying projects within Axiom Capital Tracking.

NOTE: This enhancement applies only the Web Client version of Axiom Capital Planning.

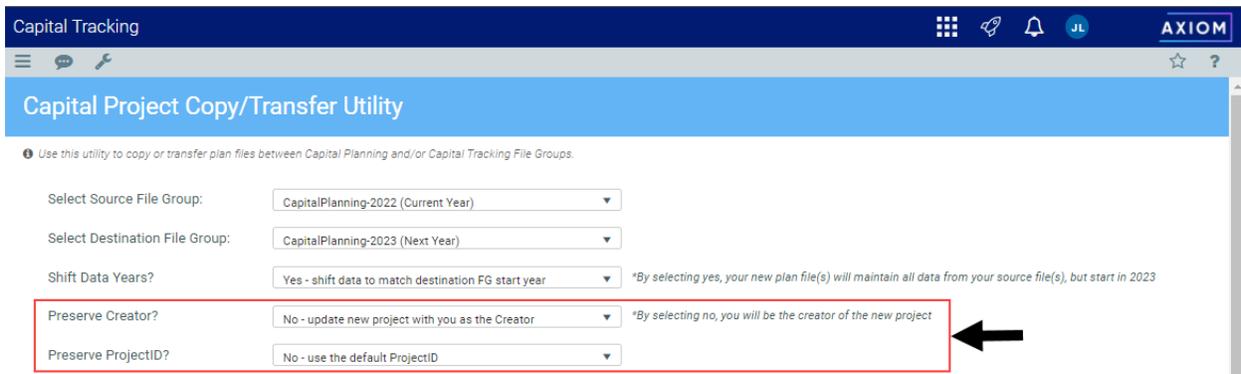
▶ About this enhancement

Where: The enhancements have been made to the Copy or Transfer Capital Projects utility.

Who: Applies to all users.

How: When the circumstance described above occur, the utility will display two new fields for you to complete:

- **Preserve Creator?** drop-down
 - To keep the original creator when copying the project, select **Yes - keep the original Creator on new project**.
 - To assign yourself as the creator, select **No - update new project with you as the Creator**.
- **Preserve ProjectID?** drop-down
 - To use the original project ID when copying the project, select **Yes - keep the original ProjectID on the new project**.
 - To assign a new project ID, select **No - use the default ProjectID**.



New options in Copy or Transfer Capital Projects utility to keep or change the creator and project ID.

▶ Where to find more information

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

- Copying or transferring capital projects

Report Center and Report Builder

This section provides an overview of the new features and enhancements for Report Center and Report Builder.

► New drag-and-drop Report Builder for ad hoc reporting

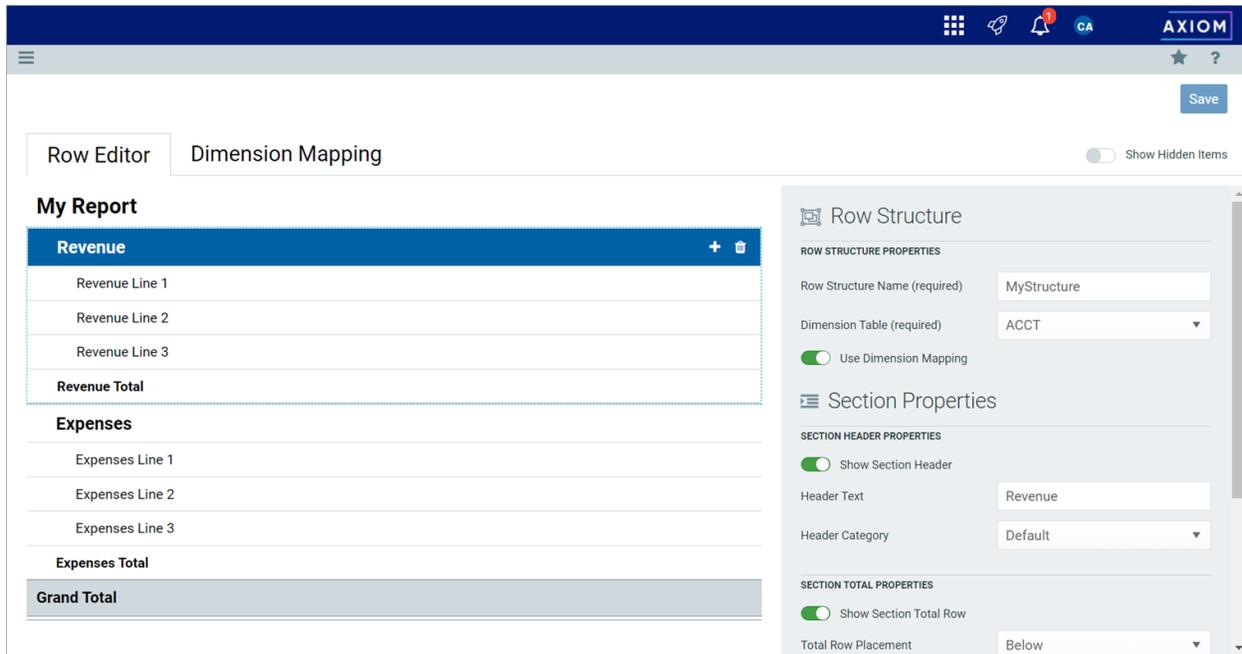
Version 2021.1 introduces phase 1 of our new Report Builder, where you can create reports in the browser using an intuitive drag-and-drop interface.

- Build browser-based reports that use a dynamic row dimension or a fixed row structure to display data in a grid
- Browse related tables and drag-and-drop columns out to the report grid—the grid updates immediately in response to changes so you can easily see what you are building
- Create simple calculations for display in grid columns such as total, difference, and percent difference
- Intuitive configuration of report titles, column properties, and grid properties
- Use the separate fixed row structure editor to create reusable row structures with multiple sections, headers, subtotals, and totals
- Report viewers can explore data in the resulting web reports using features such as filtering, sorting, drilling, and exporting to PDF or Excel

Budget to Actuals | Corporate
Through June 2020

DEPT	Q1 2020			Q2 2020		
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference
Chicago - Store 45	\$1,253,574	\$983,328	27.48%	\$1,651,523	\$968,429	70.54%
Colorado Springs - Store 120	\$128,106	\$603,741	-78.78%	\$651,444	\$594,593	9.56%
Columbus - Store 121	\$426,812	\$723,489	-41.01%	\$382,245	\$712,527	-46.35%
Dallas - Store 78	\$145,751	\$191,276	-23.80%	\$336,980	\$188,378	78.89%
Denver - Store 86	\$1,583,560	\$1,126,299	40.60%	\$1,645,244	\$1,109,234	48.32%
Detroit - Store 102	\$31,931	\$1,041,024	-96.93%	\$28,615	\$1,025,251	-97.21%
Fort Worth - Store 149	\$1,532,855	\$983,170	55.91%	\$1,428,268	\$968,273	47.51%
Fresno - Store 108	\$121,953	\$208,755	-41.58%	\$126,465	\$205,592	-38.49%
Houston - Store 112	\$26,560	\$17,841	48.87%	\$10,712	\$17,571	-39.04%
Indianapolis - Store 107	\$15,653	\$9,580	63.39%	\$15,653	\$9,434	65.92%
Kansas City - Store 137	\$71,133	\$191,544	-62.86%	\$36,415	\$188,642	-80.70%
Revenue Total	\$38,549,625	\$37,842,183	1.87%	\$31,200,174	\$37,268,817	-16.28%

Example dynamic grid report in the new Report Builder



Example fixed row structure editor to build sections for fixed report grids

For more information, see the following topics in help:

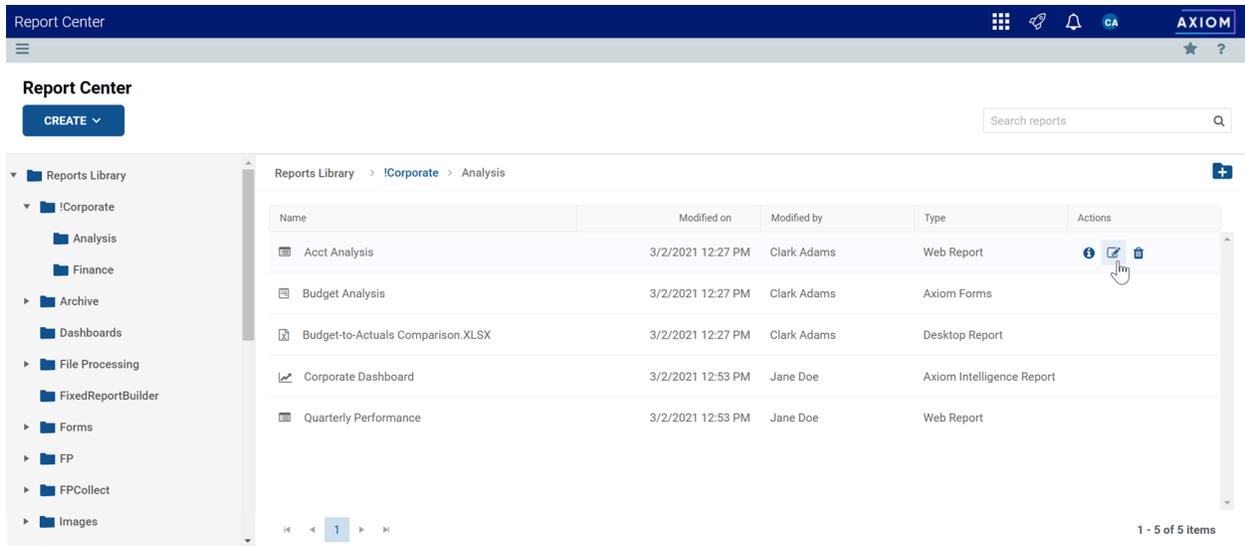
- "Web Reports"
- "Using the Report Builder"
- "Managing Fixed Row Structures fixed row structures for web reports"

NOTE: The ability to create new web reports and use the Report Builder is controlled by a new security permission, **Create Web Reports**. Enable this permission for any users or roles who you want to be able to create web reports using this new feature.

► New Report Center for easy report access

Now you can easily access all of your reports using a centralized hub in the Web Client. Using the new Report Center, you can:

- Create new web reports (all clients) and Axiom Intelligence reports (clients with certain product licenses)
- Browse report folders and view any report that you have access to—including web reports, Axiom forms, Axiom Intelligence reports, and desktop (spreadsheet) reports
- Open reports for editing, in the appropriate editor for the report type
- Perform other report management activities, such as creating new report folders, deleting unneeded reports and folders, and renaming folders



New Report Center in the Web Client

For more information, see "Report Center" in the online help.

▶ Additional enhancements

- You can now define a constraint expression for a column to limit the valid values for that column. This can be a good option when you want to limit a column to a short list of values and do not otherwise have a need to create a full lookup table.
- When assigning a lookup column to a column to limit the valid values for that column, the lookup can now optionally point to an alternate key column of a reference table.

What to know before upgrading

IMPORTANT: You must apply the Axiom 2021.1 upgrade before applying any 2021.1 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2021.1 before the first product upgrade. Refer to the **Axiom 2021.1 Release Notes** and **Axiom Healthcare Suite 2021.1 Release Notes** for considerations before upgrading.

When upgrading to the 2021.1 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:

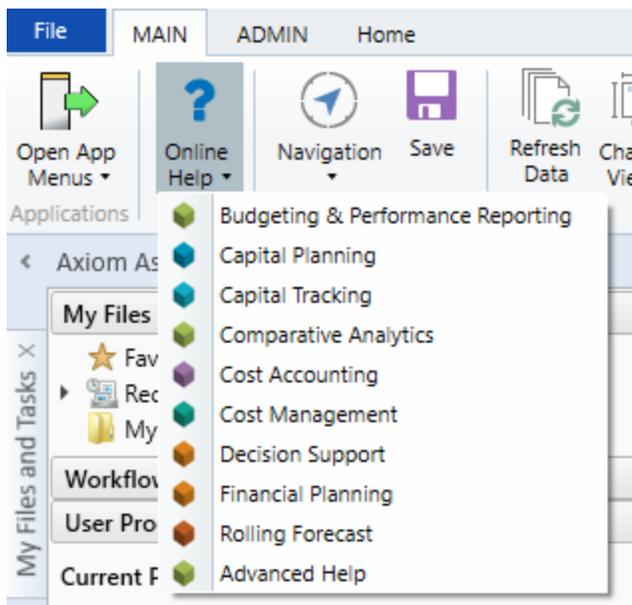
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a [support ticket](#) to schedule an 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 2021.1.1

The following tables list the resolutions for issues addressed in 2021.1.1, released on April 12th, 2021:

Excel and Web systems

No issues addressed in this release.

Web system only

Issue	Description
Capital Project Copy/Transfer Utility - Data does not shift as expected when CY project start year is less than FG year [TFS 51959]	<p>Issue: When a Current Year project has a start year before the file group year, and a user copies the project to Next Year, opting to shift the data to start in the destination start year, the saved start year in the copied project is correct, but the data only shifts one year.</p> <p>For example, if the current year file group is 2020 and the transferred project's start year is 2017, the difference is -3 years. If a user were to transfer the project to the Next Year file group of 2022, the system calculates the project as started in 2019 ($2022 - 3 = 2019$). So while the system shifts the project start year, it does not shift it to match the start year of the 2022 file group. As a result, the project loses the data between the start year of the project and the file group year, so years 2019-2021.</p> <p>Resolution: In the Copy or Transfer Capital Project utility, logic was added to determine the difference between the file group year and the transferred project's start year so that data is not lost. Part of this fix also included the correction of the Shift Data Years? drop-down so that the option to shift data now prompts the user Yes - shift data to match FG start year.</p>
Web Payback period incorrect when Capital timing is end of year [TFS 64499]	<p>Issue: The capital template does not adjust for beginning of year vs end of year in the payback period.</p> <p>Resolution: Corrected issue discovered in the First year of Positive Cash Flow calculation.</p>

Issue	Description
Summary tab in Web Client can display wrong requested amount [TFS 71715]	<p>Issue: In the Web Client, the Summary tab always shows the year Requested value as the start year value, but it should change based on the CapTrackYr.</p> <p>Resolution: Corrected by updating the template to also reference CapTrackYr for Axiom Capital Tracking projects.</p>
Update the sort for the Capital Tracking and Capital Planning Finance_group template [TFS 78938]	<p>Issue: Depending on a user's security, if they select the Capital Additions tab and select attachments, it loads without issue. However, starting in the Funding source, there can be an issue when attempting to view the attachment or save.</p> <p>Resolution: Corrected by updating the sort by for AQ3 on the FinInputs from PAYOR to PAYOR;CODE_PAYOR.</p>
Non Threshold / Summary plan files Funding Sources displays when user selects "No" for the show/no show option in the Driver [TFS 79402]	<p>Issue: In Drivers, when a user selects No for the Enable Funding Sources - Summary Fin Inputs? option, the Funding Source section still displays for a new Non Threshold (summary) plan file.</p> <p>Resolution: Corrected so that the changes from the driver were applied correctly to the CP20XX or CTSetup tables.</p>
Child forms in Capital Web are not honoring the validation when clicking Submit button [TFS 81331]	<p>Issue: When the Capital Web form is submitted rather than saved, the system should notify the user of an error but it does not.</p> <p>Resolution: Corrected the Save Validation logic on the Submit button.</p>

Excel system only

No issues addressed in this release.

Issues fixed in 2021.1.2

The following tables list the resolutions for issues addressed in 2021.1.2, released on May 10th, 2021:

Excel and Web systems

No issues addressed in this release.

Web system only

No issues addressed in this release.

Excel system only

No issues addressed in this release.