Release Notes

Axiom Capital Tracking
Version 2021.1

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

info@syntellis.com

Version: 2021.1.2

Updated: 5/10/2021

Contents

About the Release Notes

Syntellis is pleased to announce the 2021.1 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 2021.1

Axiom Capital Tracking 2021.1 delivers updated enhancements to the usability of working with capital projects and purchase 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.

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.

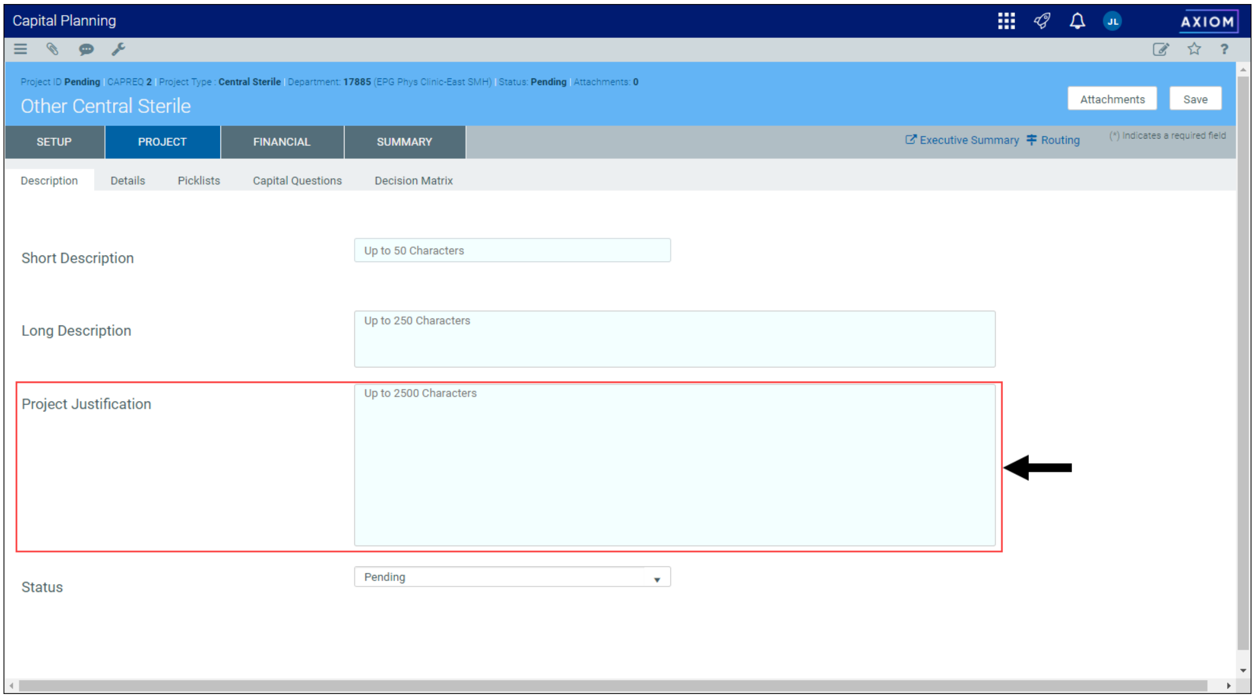
NOTE: This enhancement applies only to the web version of Axiom Capital Planning and Axiom Capital Tracking.

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:

- "Entering data for Non-Threshold (Summary) projects"
- "Entering data for 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

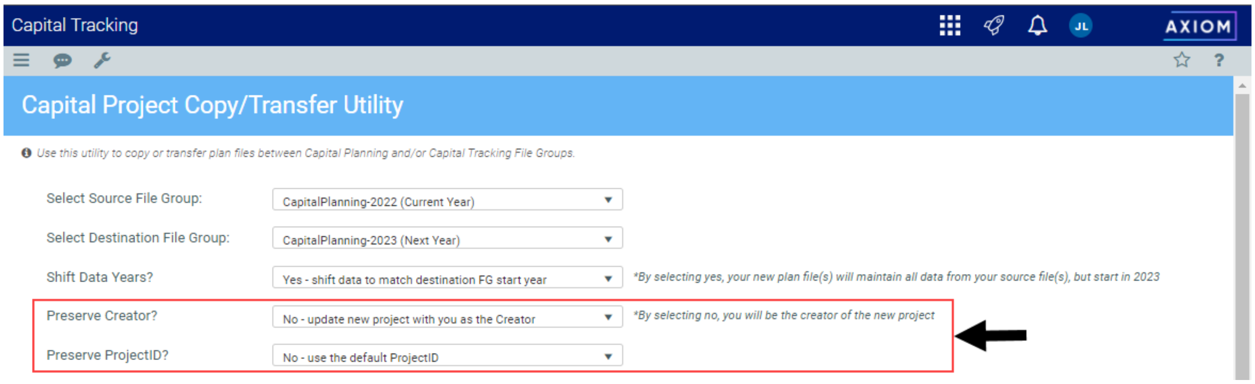
Where: The enhancements have been made to the Copy or Transfer Capital Projects utility.

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

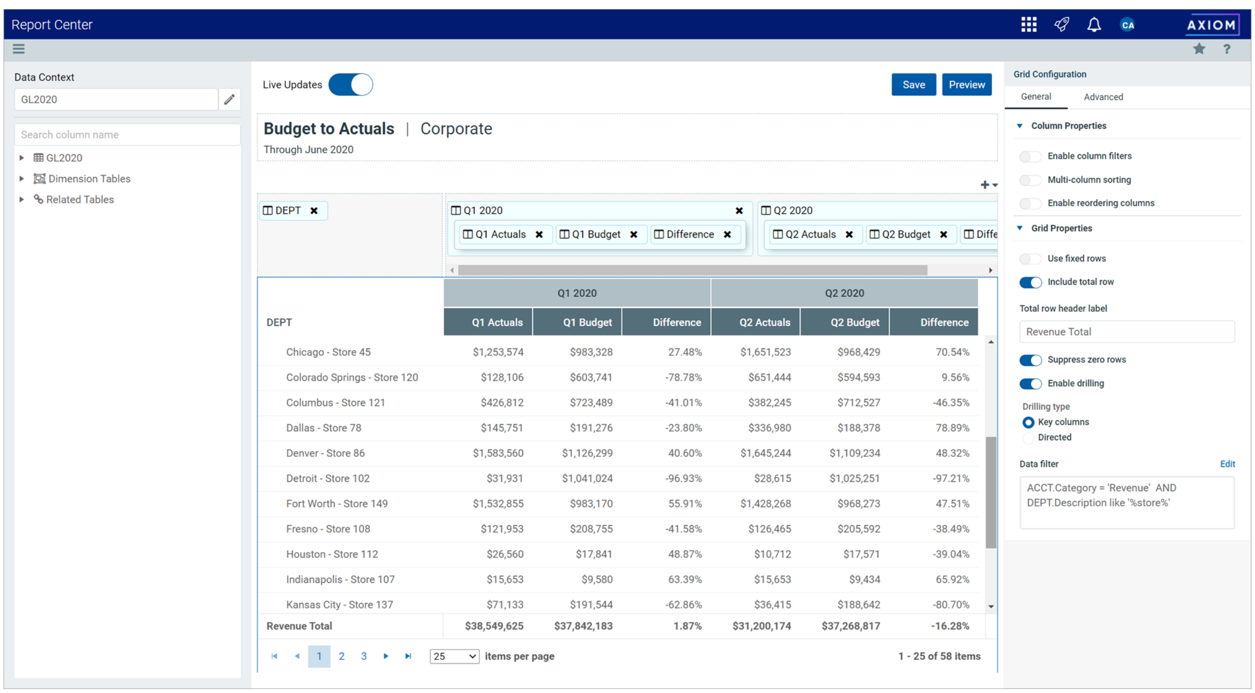
Report Center and Report Builder

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

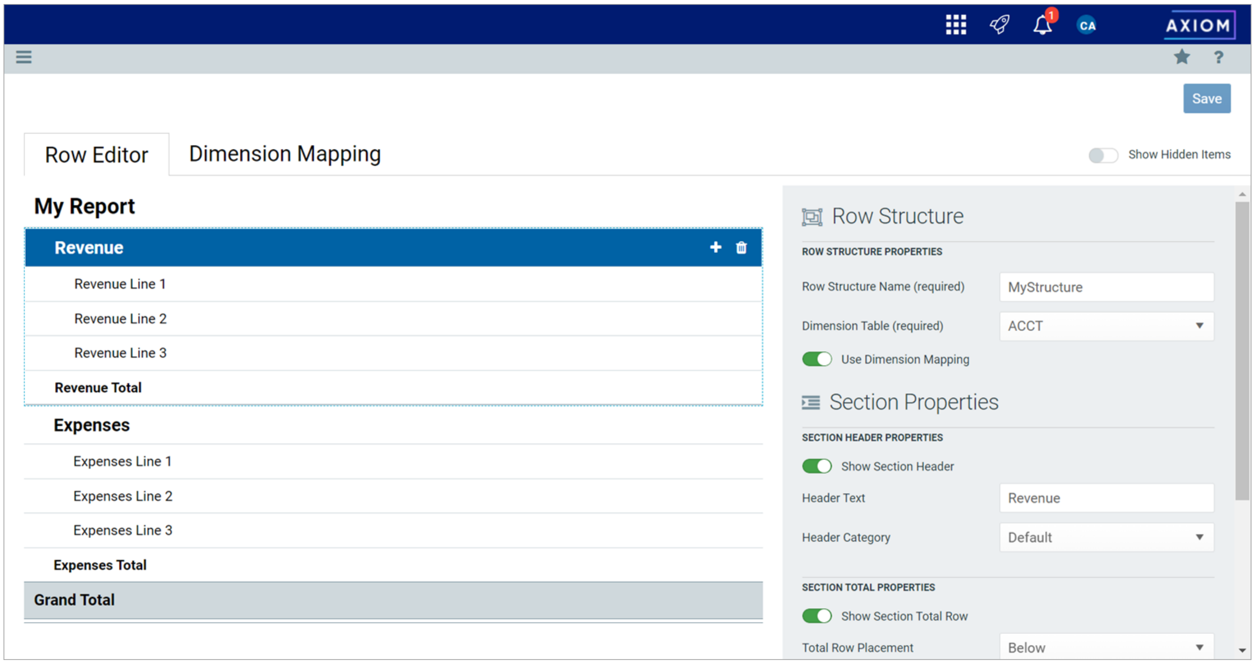
New drag-and-drop Report Builder for ad hoc reporting

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



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:

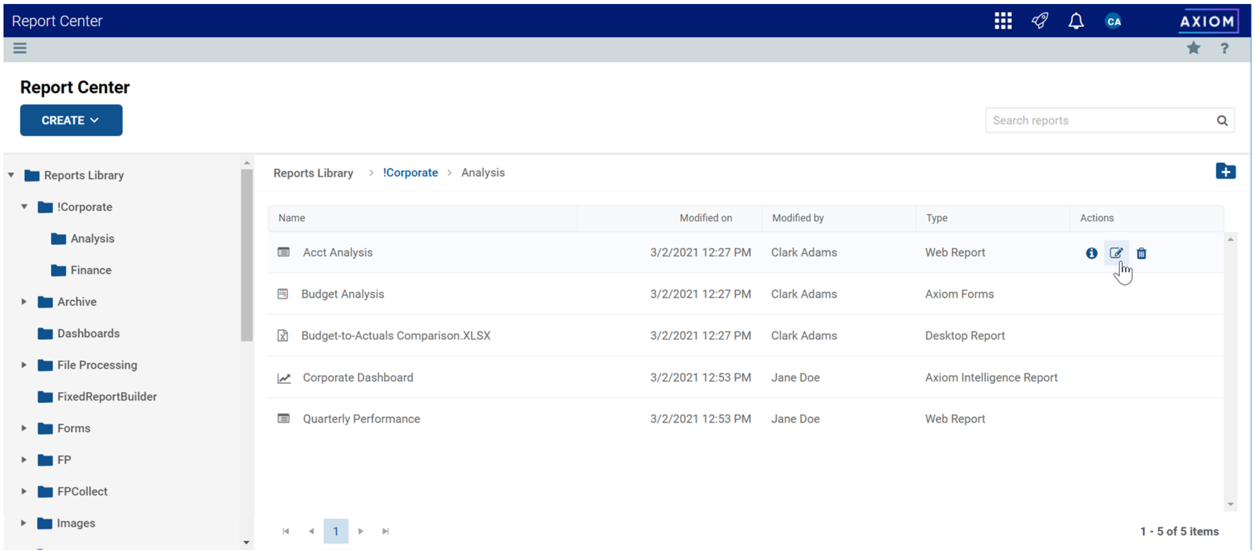
- "Web Reports"
- "Using the Report Builder"
- "Managing Fixed Row Structures fixed row structures for web reports"

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 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:

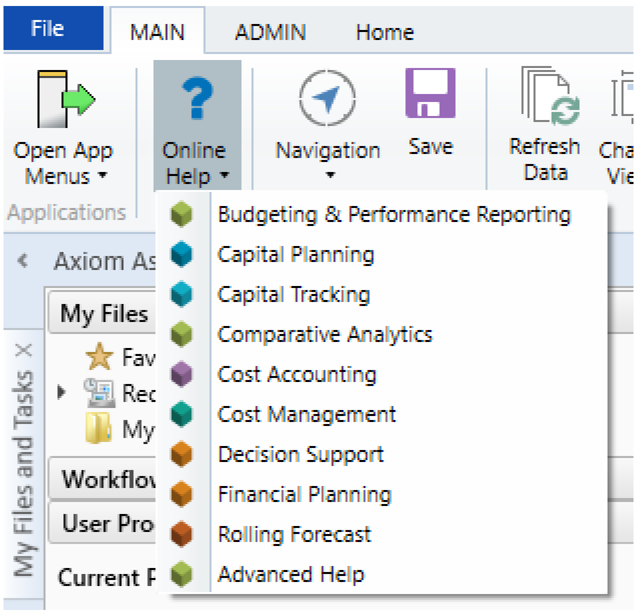
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a support ticket to schedule an installation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

Web system only

Issue	Description
Purchase request plan file has no lock on it [TFS 77590]	**Issue:** Purchase request plan files do not have the context lock needed to prevent multiple users from overwriting each others work if they have the same plan file open. **Resolution:** Corrected the purchase request template to now lock when a user has the file open.
CT Analyst role needs access to the AddOrRebuildCapitalRequest utility [TFS 39027]	**Issue:** CT Analyst role needs access to the AddOrRebuildCapitalRequest utility. **Resolution:** Corrected by giving Read Only, Save Data Allowed access to the utility.
PFB-09429 - Purchase Request Over budget warning should not include OpEx [TFS 75623]	**Issue:** The over budget warning displayed by the system includes OpEx, which is inconsistent with Tracking tab and Tracking Summary report. **Resolution:** Corrected the purchase request template so that instead of this looking at the total amount, it only looks and brings forward the Capital amount total in its calculation. This eliminates the dollars against operational from being part of the equation.
PFB-09417 - Purchase Request System Starting Fiscal Period of 1 creates wrong GLPERIOD [TFS 74974]	**Issue:** The GLPERIOD in the PurchReq-Related utilities improperly calculate the YEARMO (GLPERIOD) when the Starting FP is 1. **Resolution:** Corrected the following utilities: • Create or Open Purchase Request utility • Purchase request template • Manual Invoice utility (completed in 2020.4) • Manual Journal Entry utility (completed in 2020.4)

Issue	Description
Summary tab in Web Client can display wrong requested amount [TFS 71715]	**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. **Resolution:** Corrected by updating the template to also reference CapTrackYr for Axiom Capital Tracking projects.
Update the sort for the Capital Tracking and Capital Planning Finance_group template [TFS 78938]	**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. **Resolution:** Corrected by updating the sort by for AQ3 on the FinInputs from PAYOR to PAYOR;CODE_PAYOR.
PFB-09208 - Required field for Save Not Working in Capital Tracking Web [TFS 55429]	**Issue:** a user created a picklist field in the Purchase Request Header form in Capital Tracking. The field was required for save, but the user was still able to save and submit the form for workflow without completing this field. **Resolution:** Corrected the formula on the Picklists tab in the source file in K51 to use NA in cases where there is no response.
Web transfer utility year selection and re-transferring data issues [TFS 66794]	**Issue:** When transferring projects from Capital Planning to Capital Tracking, the Copy or Transfer Capital Projects utility prompts the user to select the years. The plan file allows for years prior to the file group start year, but the utility does not, so data is lost when transferring. **Resolution:** Corrected by adding three additional (prior) years to the **Select Years to Transfer** drop-down in the utility.
PFB-09377 - AddorRebuildCapitalRequest - change filter for existing capital project dropdown [TFS 73799]	**Issue:** Certain users should only have read-only access to specific CAPREQs. When the users open Capital Planning and Capital Tracking plan files using the Task Pane > Create or Open... option, the drop-down list displays more files than the user should see based on the plan file filter. The system then displays an error if the user selects a file they do not have access to. **Resolution:** Corrected by updating the Create or Open Capital Project and the Create or Open Purchase Request utility to use the file group security filter instead of the Capital table filter.

Excel system only

No issues addressed in this release.

Issues fixed for 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 were addressed in this release.

Web system only

Issue	Description
Users are unable to transfer a project from Capital Planning to Capital Tracking with the latest file group when they have added over 500 characters to the CTREQ.justification column [TFS 92342]	**Issue:** If a user creates a project in Capital Planning with the latest file group that has over 500 characters, then tries to transfer the project to Capital Tracking, they will be unable to save it. We need to add to default data to increase the CTREQ.justification column for existing clients. **Resolution:** Changed CTREQ.justification column from 500 to 2500 characters. 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. When a user tries to shift data, they will be prompted to confirm their choice **Yes - shift data to match FG start year**.
Fifteen additional fields for decision matrix need to be added to default data [TFS 92344]	**Issue:** If a user creates a project in Capital Planning with the latest file group and then tries to transfer it to Capital Tracking, they will be unable to save it. We need to add to default data to add the columns to CTREQ for existing clients. **Resolution:** Added a post processing file that will add the new columns to the CTREQ table.

Excel system only

No issues addressed in this release.