

## **Release Notes**

Axiom Strategy Management  
Version 2021.2

**AXIOM**

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# About the Release Notes

Syntellis is pleased to announce the 2021.2 release of Axiom Strategy Management. 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 Strategy Management 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 Strategy Management delivers expanded innovations across the entire Customer 360 platform, empowering you to get a single shared view of your customers and deliver more moments that matter.

Enhancements in this release include:

## [New utility updates user IDs to full names](#)

In Initiative table grids on Axiom Strategy Management dashboard pages, user IDs were displayed instead of user's full names. In version 2021.2 of Axiom Strategy Management, when you add a user to an Initiative as sponsor or owner, the user's full name displays instead of their user ID. However, user names added to Initiatives before version 2021.2 will display either as user IDs, or will be blank. Administrators can convert these user IDs to full name display using the Admin data utility Update User ID to Full name.

# New utility converts displayed user IDs to full names

## ► Why use this feature

The Update User ID to Full Name utility enables administrators to convert user names displayed as user IDs in Initiative lists to full user names, making it easier to determine which person performed what activity on an Initiative. This only applies to user names added to your system before the 2021.2 release; names added starting with 2021.2 are automatically displayed as full names.

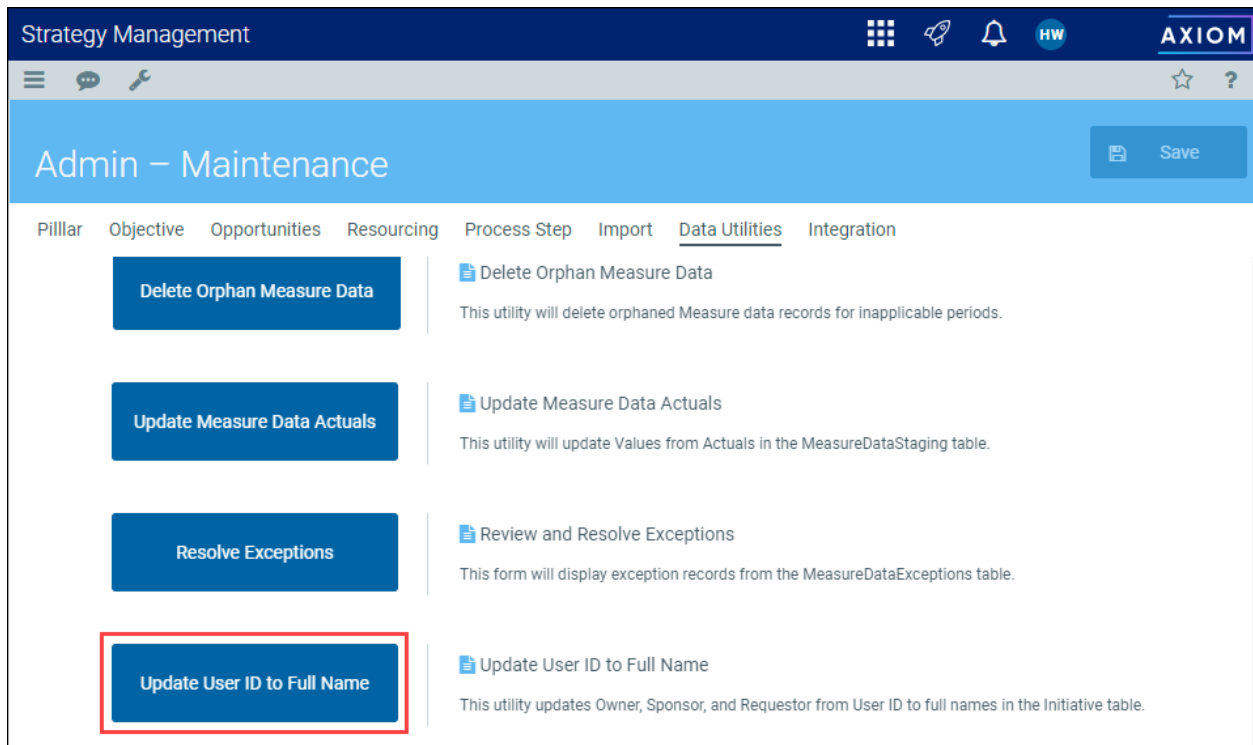
## ► How this feature works

To update user IDs displayed in Initiative lists on Axiom Strategy Management pages, the administrator runs the Update User ID to Full Name utility located under the Data Utilities tab on the Maintenance page. The utility replaces the ID name abbreviations with users' first and last names. You only need to run this utility once.

**Where:** This change applies to user names displayed in Initiative lists on the Dashboard, Perspectives, Objectives, and Initiatives pages.

**Who:** Only Axiom Strategy Management administrators can use this utility.

**How:** From the admin **Maintenance** page, under **Data Utilities**, click the **Update User ID to Full Name** button.



► Where to find more information

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

- "Convert displayed user IDs to full names"

# 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 Strategy Management, 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:

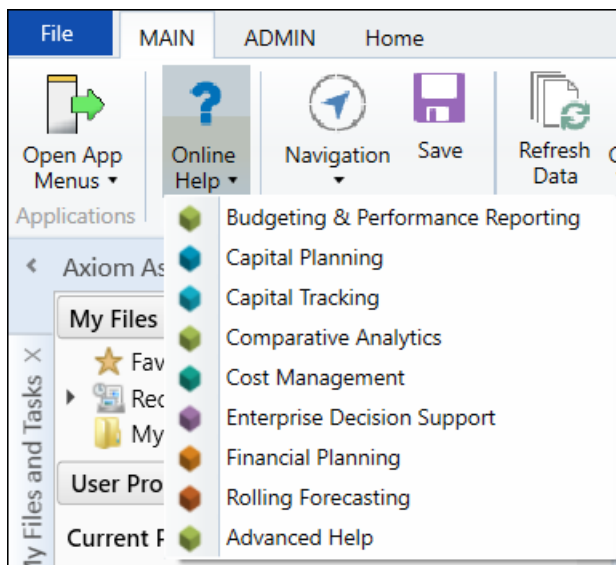
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support [info@syntellis.com](mailto:info@syntellis.com) to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
  - Desired Axiom Software 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 Software 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.



## ► Escalating to Axiom Support

[Syntellis Central](#) provides centralized self-service content and resources for the Axiom Strategy Management 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 and 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 table lists the resolutions for issues addressed in 2021.2, released on July 6, 2021:

Web system only

Issue	Description
SM Initiative - summary tab displays poorly [35350]	<p><b>Summary:</b> On the plan file Summary tab, long Perspective and Objective names are being cut off instead of wrapping to the next line.</p> <p><b>Resolution:</b> Corrected by expanding the column length to allow more characters to display; added tool tips also to help with any remaining names that might still be too long to display fully.</p>
Perspective Detail Drill - Measure names that wrap to 4th line may get partially cut off [38856]	<p><b>Summary:</b> In the Perspective Detail Drill window, Perspective measure names that wrap to a fourth line may have part of the fourth line cut off because the Description column is not wide enough.</p> <p><b>Resolution:</b> Corrected by decreasing the width of the data columns to make more room for the descriptions.</p>
SM Initiative Plan File Template Milestone Tab Doesn't Wrap [85131]	<p><b>Summary:</b> On the plan file Monthly Result tab, milestone names displayed under Milestones get cut off if they are longer than what can be displayed in the existing space.</p> <p><b>Resolution:</b> Corrected by updating the formula to dynamically increase the row height when the user enters more text.</p>