

## **Release Notes**

Axiom Capital Planning  
Version 2022.3

**AXIOM**

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# About the Release Notes

Syntellis is pleased to announce the 2022.3 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.

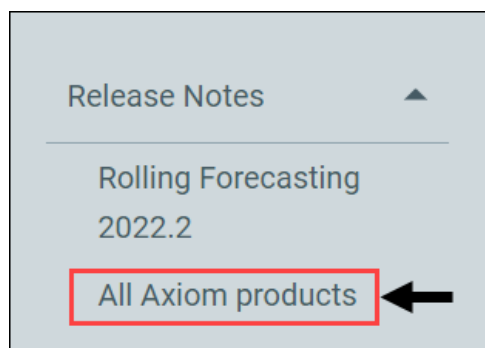
The purpose of these release notes is to provide you with the following:

- 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, click the Release Notes link at the top of the page.

## ► Accessing current and older release notes for Axiom Healthcare and Axiom Financial Institutions products

The online help for Axiom Healthcare products includes a page with links to current and past release notes for the last several years. To access this page, [open the product online help](#), and at the top of the menu on the left side of the page, click **Release notes > All Axiom products**.



# What to know before upgrading

**IMPORTANT:** You must apply the Axiom 2022.3 upgrade before applying any 2022.3 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2022.3 before the first product upgrade. Refer to the **Axiom 2022.3 Release Notes** and **Axiom Healthcare Suite 2022.3 Release Notes** for considerations before upgrading.

When upgrading to the 2022.3 version of Axiom Capital Planning, note the following:

- You can replace Syntellis reports. Any report that you created or saved under a different name remains unchanged. Revised reports are available in Document History.
- Any Syntellis report that was moved to a new location is automatically moved back to its original location.
- Syntellis product templates and calculation method libraries are replaced.
- Product task panes are replaced.
- Process definitions are not replaced.
- Driver files are replaced.
- Security roles and subsystems are reset to their configured settings. Your user security exceptions remain intact.
- Specific items that are configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, remain unchanged. Any required modifications to these areas are covered in the release notes.
- Shared tables might have their columns reordered or have new columns added to them.

# Preparing and scheduling upgrades

Summary of the upgrade process:

1. **Review product release notes** – Review this document to become familiar with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom System Administrator to contact Support by creating a [support ticket](#) to schedule an installation date and time with at least five days of advance notice. The request should include the following information:
  - Axiom platform version.
  - Axiom for Healthcare product and version.
  - Whether to first refresh and apply updates to the Axiom test sandbox with a copy of the production instance of Axiom. If so, provide the earliest date that Syntellis can do this.
  - Propose an approximate two-hour downtime window when Syntellis can apply updates 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 to enable features for this version.

# Getting help and training

Syntellis provides world-class resources 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 opens only for products you are licensed to use.

- **Contextual help** – Form/web-enabled features and products include contextual help directly within the user interface. This information provides a quick summary and instructions specifically related to the page you are using. You can access this information by clicking the question mark in the upper right corner of the page. 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 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 Support.
- Review open Software Service project status and details.

# Issues fixed in 2022.3

The following table lists the resolutions for issues addressed in 2022.3, released on November 7, 2022:

## Excel and Web systems

Issue	Description
PFB-08571 - Add User Defined Expense Drivers to the Dimension Update Reports utility [44004]	<p><b>Summary:</b> In the Dimension Update Reports (Code Update) Utility, users could not update the names of the user-defined expense drivers.</p> <p><b>Resolution:</b> Added three codes to the utility: 916100, 916200, and 916300, under the section header User Defined Expense Drivers.</p>
Legacy Capital Project Import utility causes Input Years to be 0 [138412]	<p><b>Summary:</b> In the CP Capital Project Import Utility, when users created projects using the utility with the summary template, the input years were 0. This issue occurred because the utility's default value was zero.</p> <p><b>Resolution:</b> Added a default Input year value to both the CP and CT project import utilities. The default year is pulled from the Summary driver and is the default number of input years.</p>
CP/CT Web drivers not updating for all years if file group is < 2017 [140191]	<p><b>Summary:</b> In Capital Planning or Capital Tracking Web pro forma projects from 2017 or earlier, global assumptions did not populate for Year 10.</p> <p><b>Resolution:</b> Updated the formulas in the affected utilities and templates so that assumptions are populated in for all years.</p>
Tax Field Defect in Nonthreshold Template [148712]	<p><b>Summary:</b> In a project plan file of the web-based Capital Planning or Capital Tracking system, when users entered a percentage greater than one decimal in the Sales Tax field of the Capital Inputs tab, the correct amount was displayed, but when the users scrolled down without saving and then scrolled up, the number in the field had been rounded up to one decimal place.</p> <p><b>Resolution:</b> Updated the Sales Tax field formatting to handle two decimal places.</p>
Annual (Driver) Roll Forward Utility missing fields [148713]	<p><b>Summary:</b> In the CP Annual Rollforward Utility, recently added fields were missing from the standard delivered utility. Field definitions for new fields were missing from the related Axiom query.</p> <p><b>Resolution:</b> Added the missing field definitions and updated the query to conditionally account for fields that are not applicable to older file groups.</p>