Release Notes

Axiom Strategic Financial
Planning
Version 2022.3

AXIOM

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Version: 2022.3

Updated: 11/7/2022

Contents

About the Release Notes

Syntellis is pleased to announce the 2022.3 release of Axiom Strategic Financial 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 Strategic Financial Planning online help. On the help home page, click the Release Notes link at the top of the page.

New features in 2022.3

This release includes the following new features and updates:

Updates to statistics and analytics in scenarios and initiatives

The Analytics section now appears within Initiatives, which allows planners to see the high-level impact of their initiative on the bottom line, as well as visualize this impact graphically using the Analytics chart.
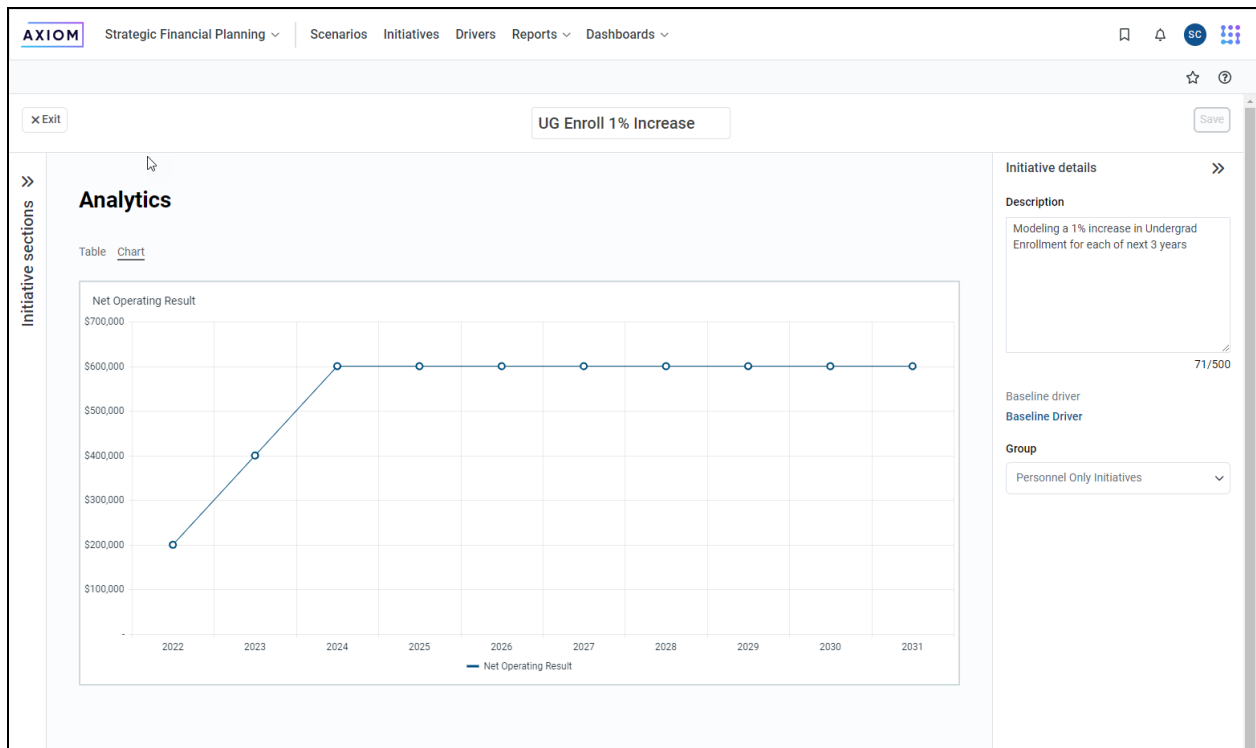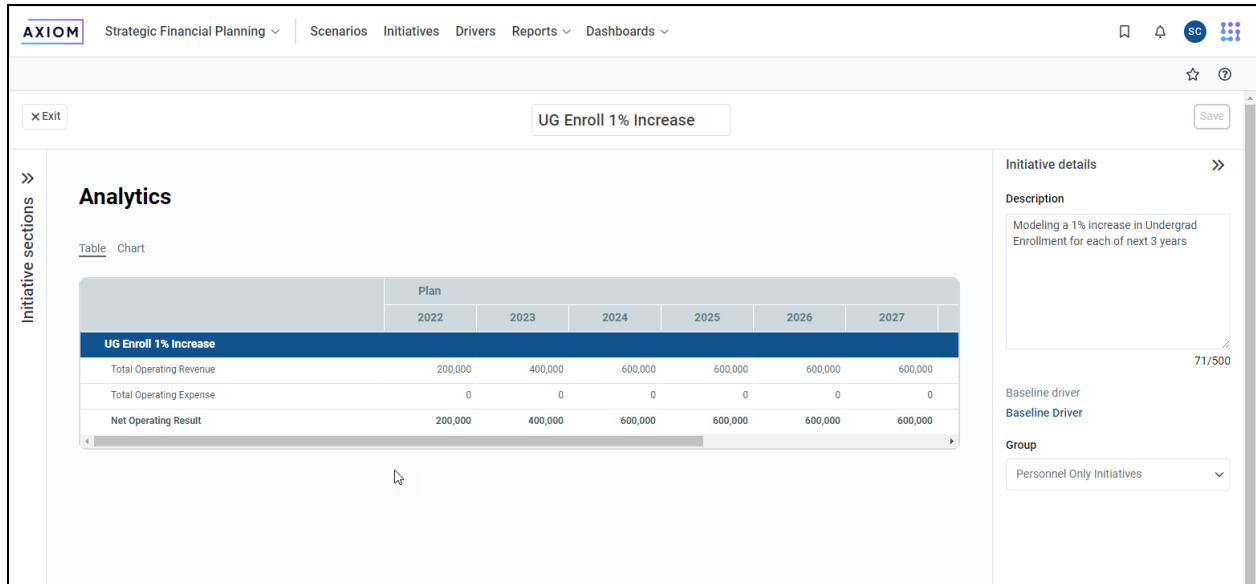
For consistency and increased visibility, Analytics also appears as its own section in Scenarios.

Updated Scenario comparison dashboard

The Scenario comparison dashboard now displays historical years to provide additional context for the health of compared scenarios.
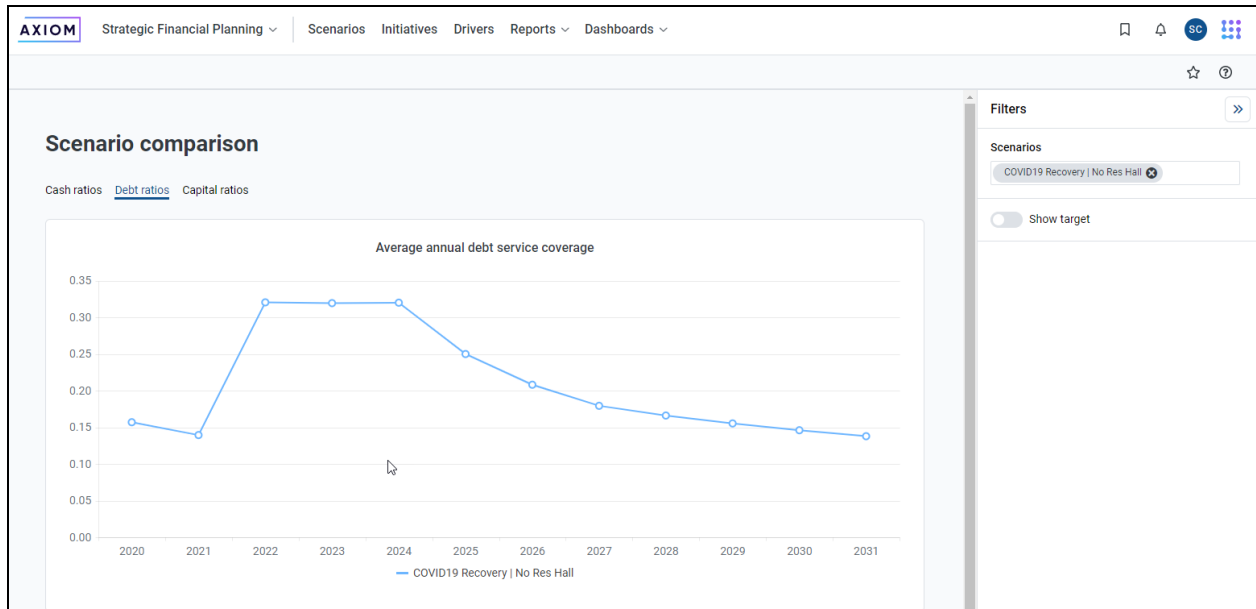
Calculation method revisions

The wording in calculations methods used in scenarios and initiatives was revised for consistency and clarity.

What to know before upgrading

> **IMPORTANT:** You must apply the Axiom Platform 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.

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

- This product upgrade contains updated templates, updated drivers, and remediated defects.
- 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.
- 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 Higher Education 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** – Web client 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.
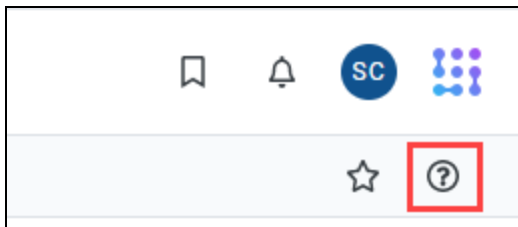
▶ Syntellis Central

Syntellis Central provides centralized self-service content and resources for the Axiom Higher Education 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

Issue	Description
154348	**Summary: Sync Feature**. Some scenarios prevented the Scenario Sync feature from working properly. **Resolution:** Resolved
95300	**Summary: Initiatives > Debt**. Users could enter a larger "Current Portion" than the "Total Borrowings" to date. **Resolution:** Resolved
145387	**Summary: Initiatives > Debt** Principal balance within Debt tab of initiatives is not calculating properly/not in alignment with dashboards. **Resolution:** Resolved