

Release Notes

Axiom Strategy Management
Version 2023.1

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. The background of the logo area is a dark blue gradient with a pattern of overlapping circles in various shades of blue.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.1 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.

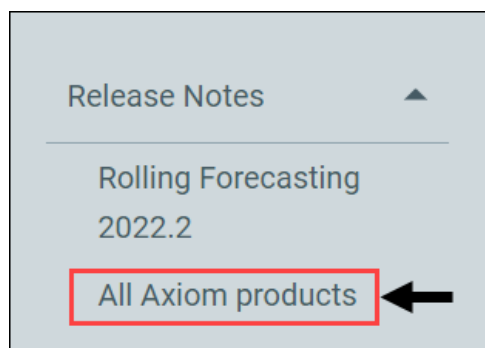
The purpose of these release notes is to provide you with the following:

- 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, 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**.



New features in 2023.1

While no new functionality has been added or enhanced in Axiom Strategy Management, it does deliver enhancement from Axiom version 2022.4. For more information, see [Axiom 2022.4 Release Notes](#).

What to know before upgrading

IMPORTANT: You must apply the Axiom 2022.4 upgrade before applying any 2023.1 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2022.4 before the first product upgrade. Refer to the **Axiom 2022.4 Release Notes** and **Axiom Healthcare Suite 2023.1 Release Notes** for consideration before upgrading.

When upgrading to the 2023.1 version of Axiom Strategy Management, note the following:

- This product upgrade may contain updated templates, calculation methods, 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.
- 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 any of the following changes:
 - Columns reordered
 - New columns added
 - Old columns removed (rare)

If you copy and paste into or from Axiom tables, please review the column order of those tables after upgrading to assess the impact to your internal processes.

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 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 Support.
- Review open Software Service project status and details.

Issues fixed in 2023.1

The following table lists the resolutions for issues addressed in 2023.1, released on February 13, 2023:

Issue	Description
Case Number 00488634 - imported Target is not being displayed in the Update Measure Data Form [161594]	<p>Summary: Users created a Custom Data Transfer utility to transfer Measure results each quarter from the DSS KPI Dashboard Staging table to the XMeasureData tables and then verified that the data for the updated quarterly Target was populated in the MeasureData table. However, the updated values were not in the Update Measure Data Form even after users ran the Data Utilities in Admin Maintenance.</p> <p>Resolution: Identified a Target field definition that is required for Axiom Query (AQ) 4. Removed the incorrect row lookup reference.</p>
Case Number 00488630 - Need to align all dashboard views so all measure results show when setting current period [161914]	<p>Summary: The Objective dashboard did not display all of the fields for Measure results if the current period was set to a month within the quarter being reported. However, the Initiatives dashboard displayed all Measure results for the same current period. The different results were caused by inconsistencies in how the various dashboards determined the current monthly or quarterly period.</p> <p>Resolution: Updated the monthly and cell variable formulas on the Strategy Management Dashboard and the associated Perspective Detail Drill for consistent periods across dashboards.</p>