Release Notes

Axiom Strategic Financial
Planning
Version 2023.2

AXIOM

320 N Sangamon St
Suite 700
Chicago, IL 60607
(847) 441-0022
www.syntellis.com
info@syntellis.com

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About the Release Notes

Syntellis is pleased to announce the 2023.2 release of Axiom Strategic Financial Planning. Each product release provides new features, enhancements, and configuration options. Many of these features and enhancements are a direct result of your feedback and suggestions.
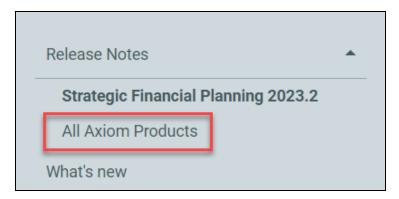
The purpose of these release notes is to provide you with the following:

- High-level descriptions of new features
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

Prior to upgrading, review the **Axiom 2023.2 Release Notes** and the release notes for each product that is licensed by your organization.

▶   Accessing current and older release notes for Axiom Higher Education products

The online help for Axiom 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 2023.2

No new features are available in Strategic Financial Planning for this release.

What to know before upgrading

When upgrading to the 2023.2 version of Axiom Strategic Financial 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 returned 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 or 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:

   - Axiom platform version.
   - Axiom for Higher Education product and version.
   - Whether to first refresh and then 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 refresh and apply upgrades.
   - An approximate two-hour downtime window when Syntellis can apply updates to the production instance of Axiom. The downtime window should occur during regular business hours of Monday through Friday 7 AM to 7 PM Central Time (except for 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, release notes, webinar/training announcements, and videos to guide you through managing your system.

To access these resources, click **Online Help** from the **Main** or **Admin** tabs, and then select the product. Axiom Help opens in a new browser. The online help opens only for products you are licensed to use.

▶ Syntellis Central

Syntellis Central provides centralized self-service content and resources for the 2023.2 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 2023.2

Issue	Description
159301	**Issue: Debt instrument Current Portion versus Borrowings**. An error existed in the logic that evaluated the Current Portion of a debt instrument versus the user's Borrowings entry. **Resolution:** This logic now correctly evaluates the *project to date* values of Current Portion versus Borrowings entries instead of incorrectly evaluating these values within an individual year.
146987	**Issue: Counter is not updated in Command Center**. The counter that displayed the number of configured accounts did not correctly update data after a new account was created. **Resolution:** The counter is now updated correctly after a new account is created.
156773	**Summary: Statistic description could not be updated**. The logic that evaluated the statistic description always presented an error if users changed the description. **Resolution:** The logic was revised to allow users to update the Statistic description.