Release Notes
Axiom Capital Planning
Version 2023.3

AXIOM

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Contents

About the Release Notes

Syntellis is pleased to announce the 2023.3 release of Axiom Capital 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

This document provides the list of changes to shared areas of the Axiom Healthcare Suite products, which includes:
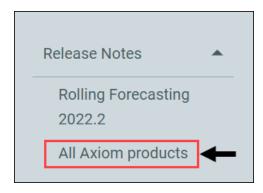
- Suite-wide feature additions and changes

- Security changes

- Key platform changes

Each Axiom Healthcare Suite product has their own separate release notes that provide additional details about features and fixes that are specific to that product.

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 Healthcare 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's new in version 2023.3

Welcome to Version 2023.3 of Axiom Capital Planning!

This release of Axiom Capital Planning includes the following new features and enhancements:

▶ 2025 file group

Added the Capital Planning 2025 file group to the file group library in Legacy Excel Capital.

What to know before upgrading

> **IMPORTANT:** You must apply the latest Axiom upgrade before applying any 2023.3 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2023.2 before the first product upgrade. Refer to the **Axiom Release Notes** for consideration before upgrading.

When upgrading to the 2023.3 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 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.

Prepare and schedule 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 case to request a Preferred Upgrade Window:

   - Log in to Syntellis Central.

   - Click **Support Cases**.

   - Click **Schedule an upgrade**.

   - Enter your Preferred Upgrade Window information.

   - Click **Submit**.

3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps to enable features for this version.

Get 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 Axiom Healthcare Suite 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.

- Ask a question in the peer-to-peer Syntellis Community.

- Submit a Support issue, find suggested content, and manage any outstanding issues directly with Support.

Issues fixed in 2023.3

Excel and Web systems

Issue	Description
CT Web Purchase Request Line Item Detail tab Item description name not changing with driver. [59643]	**Summary:** The driver ItemDesc field did not affect the web form because the AQ control column did not match. **Resolution:** Changed the R100 cell from F to GO on the Control_Sheet tab.
CP to FP transfer utility - Refresh variables not being applied. [59673]	**Summary:** The refresh variables in the CP to FP transfer utility were not applied to the projects that appeared in step 3. **Resolution:** Updated the filter logic to display the only selected entity.
Transfer from CP to FP failing to transfer while using filters in the refresh variables. [62645]	**Summary:** When users had multiple projects in a list (step 2), and applied a filter to select a specific project to transfer, that project was not transferred and the application displayed an error message. **Resolution:** Updated the filter in step 3 so that it processes the project transfer.

▶ Issues fixed in 2023.3.1

No client-facing issues were addressed in 2023.3.1, released on September 11, 2023.