

Release Notes

Axiom Financial Planning
Version 2023.3

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame made of two parallel lines, one light blue and one light purple, which are slightly offset from each other.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.3 release of Axiom 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

This document provides the list of changes to shared areas of the Axiom Healthcare Suite products, which includes:

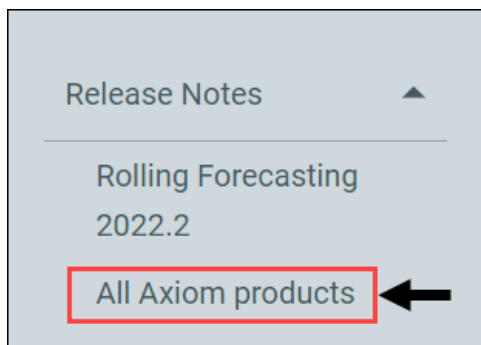
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

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**.



New features in 2023.3

No new features or enhancements were made in Axiom Financial Planning 2023.3, released on August 28, 2023.

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 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.

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

The following table lists the resolutions for issues addressed in Axiom Financial Planning 2023.3, released on August 28, 2023:

Issue	Description
Case Number 00515335 - URGENT: Issue with Financial Planning Integration Utility. [#61029]	Summary: The variables were static within Rolling Forecasting (Step 2) and therefore didn't produce the correct results for Manager Reporting (Step 3). Resolution: Adjusted the logic, identified variables that were passed to the scheduler, and switched variables from static to dynamic for Manager Reporting or Rolling Forecasting year-based selections.
When creating a scenario for volume/revenue and expense nodes in Scenario Manager, the ExpenseDriver1 & ExpenseDriver2 columns are not being saved to the CP20XX table. [#58120]	Summary: When saving to a table with the Scenario Manager utility, the ExpenseDriver columns were missing. Resolution: Added applicable fields to the asset so the ExpenseDriver columns are saved to the table.
Error opening Transfer to Financial Planning related to SQL error that disappears when deleting "limit query based on another table." [#58108]	Summary: When users attempted to retrieve data from an ACT YYYY table in a Snowflake system, an error appeared. Resolution: Changed associated tables from hybrid back to default so limit queries will work in a Snowflake system.