

## **Release Notes**

Axiom Strategic Financial  
Planning  
Version 2023.3

**AXIOM**

320 N Sangamon St  
Suite 700  
Chicago, IL 60607  
(847) 441-0022  
[www.syntellis.com](http://www.syntellis.com)  
[info@syntellis.com](mailto:info@syntellis.com)

Syntellis® is a trademark of Syntellis Performance Solutions, LLC. Microsoft®, Excel®, and Windows® are trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners.

This document is Syntellis Performance Solutions Confidential Information. This document may not be distributed, copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable format without the express written consent of Syntellis Performance Solutions.

Copyright © 2023 Syntellis Performance Solutions, LLC. All rights reserved.

Version: 2023.3

Updated: 8/14/2023

# Contents

About the Release Notes .....	4
What's new in version 2023.3 .....	5
What to know before upgrading .....	6
Prepare and schedule upgrades .....	7
Get help and training .....	8
Issues fixed in 2023.3 .....	9

# About the Release Notes

Syntellis is pleased to announce the 2023.3 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.

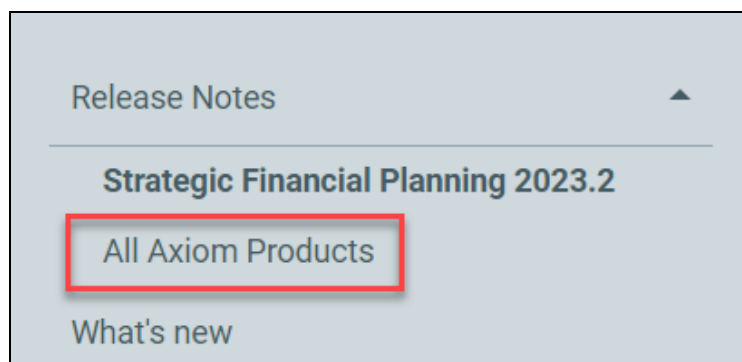
The purpose of these release notes is to provide you with the following:

- 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 2023.3 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**.



# What's new in version 2023.3

Welcome to Version 2023.3 of Axiom Strategic Financial Planning.

While no new functionality has been added or enhanced in Axiom Strategic Financial Planning, it does deliver enhancements from Axiom Version 2023.3. For more information, see [Axiom 2023.3 Release Notes](#).

# 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 2023.3 before the first product upgrade. Refer to the **Axiom Release Notes** for consideration before upgrading.

When upgrading to the 2023.3 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.

# 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 2023.3 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 2023.3, released on August 14, 2023:

Item	Description
42503	<p><b>Summary:</b> When planning Strategic Financial Planning (SFP) by fund, users could not enter statistics by fund in the data collection utility, causing statistics to populate as 0 (zero).</p> <p><b>Resolution:</b> If the system is configured to be planned by fund, users can now enter statistics by fund. Systems that do not use funds still show a single input field per statistic and department.</p>
50883 Sync button looks enabled and can be clicked if Scenario is synced	<p><b>Summary:</b> The Sync button appeared to be enabled and could be clicked if the scenario was synced.</p> <p><b>Resolution:</b> The Sync button is now disabled if the scenario is synced.</p>
50981 Baseline driver is not reset for all departments when changing it on the entity	<p><b>Summary:</b> The baseline driver was not reset for all departments when it was changed on the Consolidated Department.</p> <p><b>Resolution:</b> Corrected the logic to reset the baseline driver correctly if performed by users.</p>
65444 Selected initiatives are not displaying on the Review step	<p><b>Summary:</b> Selected initiatives were not included in rollover or displayed on the Review step.</p> <p><b>Resolution:</b> Corrected logic to include initiatives (and related drivers) when user clicks the Select all option for initiatives.</p>