

Release Notes

Axiom Capital Planning
Version 2023.4

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.4 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:

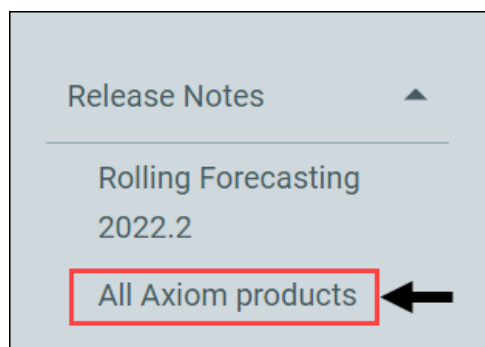
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

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 2023.3 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 2023.4

Axiom Capital Planning 2023.4 includes the following enhancement:

- ▶ 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 2023.4 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 2023.4 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 2023.4

The following table lists the resolutions for issues addressed in 2023.4, released November 13, 2023:

Issue	Description
CP to FP transfer utility - Previously transferred projects outside refresh variable selections being re-transferred [67032]	Summary: Projects that were previously transferred outside refresh variable selections were transferred again. Resolution: Updated the formula in cell P121 on the Control Sheet.
PFB-09380 - Sorting the Workflow Steps in Utilities [59559]	Summary: The StepNumber text field sort was out of order. Resolution: Added a formula to the calculation method row to change StepNumber to a numeric value.
CP/CT Web description space removed [59573]	Summary: A comma was removed from the CPReqyyyy description after updates on the Capital tab were saved. Resolution: Fixed the formula in cell AA26 so that it includes a space after the comma.
Case Number 00513720 - Axiom Days In Step Disconnect [63501]	Summary: "Days in Step" on the Routing page and "CP Process Flow Days" in the Step report differed by three days. Resolution: Updated the method that assets were calculated DaysInStep.