

## **Release Notes**

Axiom Capital Tracking  
Version 2023.4

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. The top and bottom lines are a light blue color, while the left and right lines are a light purple color.

**AXIOM**

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# About the Release Notes

Syntellis is pleased to announce the 2023.4 release of Axiom Capital Tracking. 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:

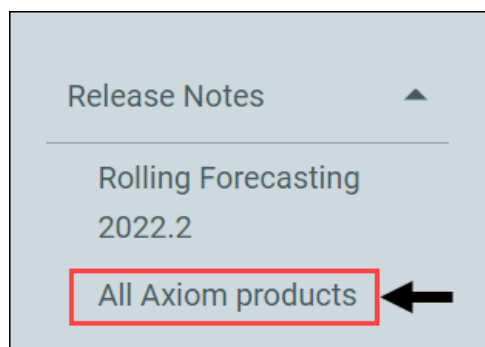
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

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 Tracking 2023.4 includes the following enhancements:

- ▶ Capital Transfer utility

Updated the Capital Transfer utility to complete the sequence of formulas in the Transfer calculation method column CO. After this update, the duplicate TRX error will not occur when you add more than three transfers.

- ▶ Project Tracking report

Updated the Excel version of the Project Tracking report to open a purchase request plan file.

# 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 Tracking, 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
CT Project Detail by Year (Web) report - Dept sorting as string [59748]	<p><b>Summary:</b> Department IDs were sorted as strings in the Project Detail by Year report.</p> <p><b>Resolution:</b> Updated the column type so the ordering works as intended.</p>
Project Approval, Project Tracking (Excel) reports - Incorrect default sort order displays [59754]	<p><b>Summary:</b> The report header sort order did not match the expected sort behavior.</p> <p><b>Resolution:</b> Updated the sort function for all assets.</p>
Miscellaneous CT reports - Department sort not working [59793]	<p><b>Summary:</b> Sorting by department did not function as expected in several Capital Tracking (CT) reports.</p> <p><b>Resolution:</b> Updated the sorting by Department function.</p>
Capital Dashboard - Wrong drivers being referenced in refresh variables when viewing Capital Tracking tab [59787]	<p><b>Summary:</b> Several refresh variables referenced Capital Tracking (CT) driver tables rather than Capital Planning (CP).</p> <p><b>Resolution:</b> Modified the following variables to reference CP drivers instead of CT drivers (if a CT system is also licensed for CP):</p> <ul style="list-style-type: none"><li>• Setup</li><li>• Category</li><li>• Picklists</li><li>• Templates</li></ul>
Case Number 00507244 - 10% Listed on Project Summary PDFs [59791]	<p><b>Summary:</b> The Net Present Value (NPV) header in the Excel version of the Executive Summary report displayed 10% even if the default discount rate was not 10% percent.</p> <p><b>Resolution:</b> Updated reports to use the default NPV value that comes from the drivers.</p>
PR changing from Approved to Pending error [71877]	<p><b>Summary:</b> If a saved purchase request (PR) with an Approved status was saved, reopened, and then updated to Pending, the new Pending status was not saved into the system.</p> <p><b>Resolution:</b> Added a method to update status values before saving an updated purchase request.</p>

Issue	Description
CP Import utility has hard coded table [71899]	<p><b>Summary:</b> The CP Import utility saved values to an incorrect database table.</p> <p><b>Resolution:</b> Removed the save2db static references and updated the previous rows to check for incorrect references.</p>
Project Ranking - Error after filtering by Status [73927]	<p><b>Summary:</b> Filtering by Status on the Project Ranking report caused an error.</p> <p><b>Resolution:</b> Updated the logic used to filter by Status.</p>
Comparative Analytics - Help Button triggers error message [78058]	<p><b>Summary:</b> Clicking <b>Help</b> triggered an "Invalid help code" error message.</p> <p><b>Resolution:</b> Updated the code references causing the error in the context-sensitive help.</p>