

Release Notes Axiom Software Version 2019.1



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# Introduction

Kaufman Hall is pleased to announce the release of **Axiom Software Version 2019.1**. This release features enhancements to various areas of the software, such as:

- Enhancements to the **Data Grid component**, to accommodate a wider range of use cases:
  - Option to suppress zero-data rows
  - Ability to include calculations on the total row
  - Create if-then-else conditions for icon display
- Enhancements to the **Fixed Report component**, including the same enhancements listed for the Data Grid component, as well as additional options to reverse the sign on variance calculations and to hide empty sections
- New **Import** feature to import multiple files from a folder using a single import utility, and general improvements to the Import Wizard dialog
- Updated branding (logos and colors) throughout the application

Version 2019.1 was originally released on April 1, 2019.

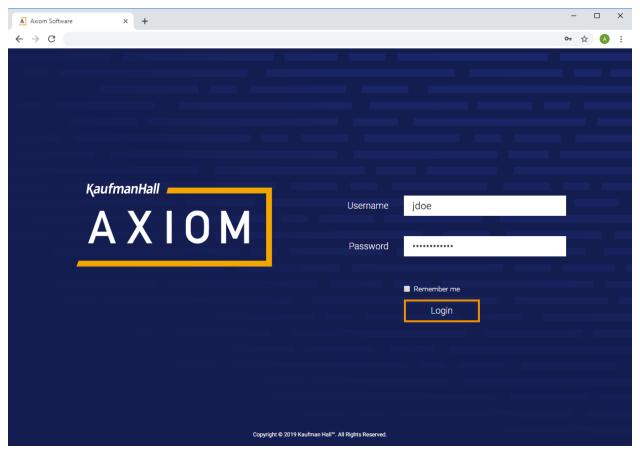
**IMPORTANT:** Although Kaufman Hall strives to maintain backward-compatibility with each release, any upgrade has the potential to interrupt system functionality. The Upgrade Considerations section details known impacts to existing functionality. However, other impacts may be unforeseen at the time of release, or may be particular to your specific system design and configuration. We strongly recommend performing the upgrade first on a test server and then testing system functionality to make sure all critical features are still working as expected.

# Overview of new features and enhancements

This section provides an executive summary of the features and enhancements in this release. For more information, please see the separate *What's New* document for 2019.1.

## Updated branding

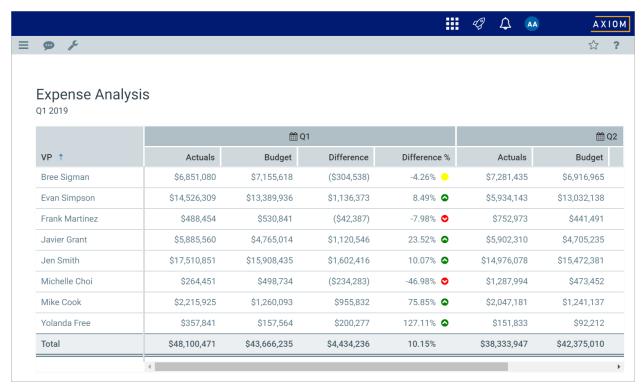
Version 2019.1 features updated logos, images, and colors throughout the application—affecting areas such as the login screen, Web Client toolbar, and the About box.



Example updated login screen

# Enhancements to Data Grids and Fixed Reports

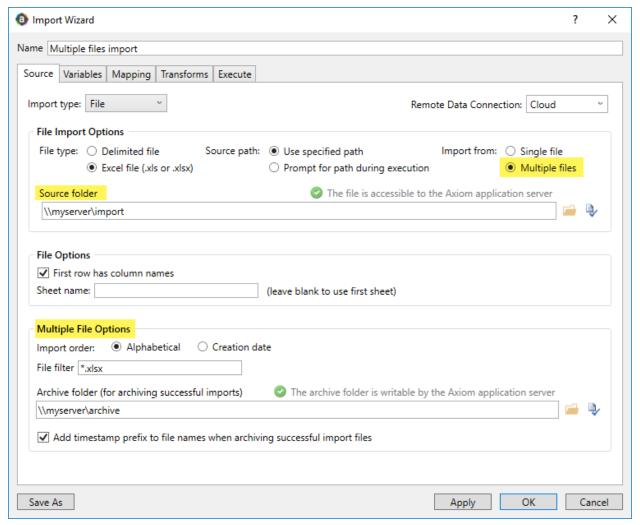
Various enhancements were made to the Data Grid and Fixed Report components for Axiom forms, to accommodate a wider range of use cases and to streamline the setup process. These enhancements include the ability to suppress zero-data rows and empty sections, include calculations in subtotal and total rows, and use if-then-else conditions for icon display.



Example data grid showing total row and icon condition enhancements

# Import multiple files from a folder

You can now configure an import utility to import multiple files from a folder. You specify a source folder for the import and an optional file filter, and when the import is executed, all matching files in the folder will be imported. This approach is useful when you have multiple import files that share the same file structure and destination table.



New options to import multiple files from a source folder

### Other enhancements

- The Report Builder page was revised and renamed to Report Designer. The Report Designer provides a streamlined user interface to open and create web reports.
- The Import Wizard and Export Wizard dialogs were revised to accommodate enhancements and to improve ease-of-use by more logically organizing related settings.
- Various minor updates were made to Axiom forms, such as the ability to open Axiom forms from a folder in a custom task pane, a new command to open a plan file, and the ability to define formatting for bullet chart values.
- When opening a web report from an Axiom form, you can now pass in a year so that the report data refreshes based on that year.
- Control Sheets are no longer hidden by default in new Axiom spreadsheet files, for users with Sheet Assistant permissions. Control Sheets are still hidden for end users without this permission.

# Upgrade considerations

Please review the considerations in this section before upgrading to version 2019.1. If you have any questions or if you need assistance with upgrading, please contact Kaufman Hall Software Support.

**IMPORTANT:** This document details the upgrade considerations when moving from the most recent Axiom Software release of 2018.4 to the new release of 2019.1. If you are upgrading from an earlier version, please also see the release notes for the interim versions for any additional upgrade considerations.

Change to total row behavior in Data Grid components

Description

In previous releases, Data Grid components in Axiom forms used a tag named <code>[TotalRow]</code> to configure the contents of the total row (if enabled for the grid). In order to include a table column in the total row, it was required to enter an aggregation type into the <code>[TotalRow]</code> column, such as Sum or Count. Calculated columns could be included, but could only use an assigned aggregation—it was not possible to apply the defined calculation to the total row.

Going forward, Data Grid components have been improved so that all relevant table columns are automatically included in the total row, and these columns automatically use the appropriate aggregation type. Calculated columns are also automatically included in the total row, and now use their defined calculation. To enable this improved behavior, the DataGridColumns data source must contain a new tag named [Total] instead of the old [TotalRow] tag. This new tag is automatically included in any newly created data sources. You can add the tag manually to any existing data sources.

After upgrading, any existing Data Grid components that use the legacy  $[{\tt TotalRow}] \ tag \ will \ behave \ as follows \ for \ limited \ backward-compatibility: any column \ with a non-blank value in the <math display="block">[{\tt TotalRow}] \ column \ is \ included \ in \ the \ total \ row, \ and \ uses \ the \ new \ total \ behavior \ where \ the \ aggregation \ or \ calculation \ is \ automatically \ applied.$ 

**Testing and Review** 

If your system has any Data Grid components with an enabled total row, you can convert the grid to use the new behavior as follows:

- Find the existing [TotalRow] tag in the DataGridColumns data source, and rename it to [Total].
- Clear all entries in this column except for the Header keyword. The Header keyword determines where the total row label is displayed, and works the same way as before.
- It is not necessary to set any columns to True, because all relevant columns will be included by default.

Preview the form and review the contents of the total row. If you identify any columns that you do not want to include in the total row, you can enter False in the [Total] column.

More Info

For more information, see the *Data Grid enhancements* section of the separate *What's New* document.

Change to total and subtotal behavior in Fixed Report components

Description

In previous releases, Fixed Report components in Axiom forms used a tag named [SubTotal] to configure the contents of subtotal and total rows in the report. All relevant columns and calculations were included these rows by default, however, calculated columns did not use their defined calculation. Instead they were summed or subtracted, as defined by the expression used by the subtotal or total row.

Going forward, Fixed Report components have been improved so that calculated columns automatically use their defined calculation on subtotal and total rows. To indicate the changed behavior, and to align the total tag between the Data Grid component and the Fixed Report component, newly created FixedReportColumns data sources now use a tag named [Total] instead of the old [SubTotal] tag. You can add the tag manually to any existing data sources.

After upgrading, any existing Fixed Report components with a [SubTotal] tag will continue to work as before to determine which columns are included in subtotal and total rows. If a calculated column is included, it will now use the new total behavior and apply its defined calculation to the total row.

Testing and Review If your system has any Fixed Report components, you can convert the report to

use the new tag by locating the existing  ${\tt [SubTotal]}$  tag in the

FixedReportColumns data source, and then renaming it to <code>[Total]</code>. It is not necessary to set any columns to <code>True</code>, because all relevant columns will be included by default. However, you may want to clear any calculated columns that had previously been set to <code>False</code>, so that these columns are now included

in subtotal and total rows.

More Info For more information, see the Fixed Report enhancements section of the

separate What's New document.

Control Sheets no longer hidden by default for Sheet Assistant users

Description

The file-level option **Hide Control Sheet on open** determines whether the Control Sheet is hidden by default for *all* users when the file is opened. Going forward, the default setting for this option is **Off**. This applies to all newly created spreadsheet Axiom files, and any existing files where the setting is blank or not present.

17	Workbook Options		
30	Enable Message Stream	Off	
31	Clear DataLookups on save	Off	
32	Hide Control Sheet on open	Off	
33	Data Context		

When this option is disabled, the visibility of the Control Sheet depends on whether the current user has the **Allow Sheet Assistant** permission for the file (as specified on the **Files** tab of security). This default behavior works as follows:

- If you are an administrator or you have the Allow Sheet Assistant
  permission, and you open the document as read/write, then the Control
  Sheet is visible. This behavior is intended to provide report writers with easy
  access to configuration settings on the Control Sheet.
- Otherwise, the Control Sheet is hidden. In this case, users with Allow Sheet
   Assistant permission can unhide the Control Sheet by double-clicking a field
   name on the Sheet Assistant. And as always, any user with Allow Unprotect
   permission can manually unhide the sheet.

This default behavior means that in most cases, there is no longer any need to enable **Hide Control Sheet on open**. However, if you do have a situation where you need the Control Sheet to always hide, for all users, then you can set this option to **On**.

**NOTE:** This behavior does not apply to plan files. The Control Sheet is always hidden in plan files for all users. It is rarely necessary to access the Control Sheet in plan files, because any configuration changes for plan files need to be made in the template.

### **Testing and Review**

For existing files, this behavior change only applies to files where the **Hide Control Sheet on open** option is blank or not present (because it will now default to Off instead of On). Additionally, only administrators and users with access to the Sheet Assistant will notice any change in behavior. In most cases it is beneficial and desired to show the Control Sheet by default to these users. End users who do not have access to the Sheet Assistant will continue to not see the Control Sheet.

If you have an existing file where **Hide Control Sheet on open** is *not* enabled, but the Control Sheet is still hiding for all users on open, this may mean that the file was saved using the previous default behavior (or that the Control Sheet was manually hidden using Excel functionality). In this case, you can open the file, unhide the Control Sheet, and then save the file. The next time the file is opened, it should now use the default behavior where Sheet Assistant access controls the visibility of the Control Sheet.

# Legacy Axiom form features hidden in user interface

### Description

A couple of legacy form features are now hidden in the user interface, so that these features can only be configured manually on the Form Control Sheet. This change was made to streamline the user interface to remove features that are inapplicable to most users, and to prevent confusion over when these features should be used.

- The option Grid Formatting for Formatted Grid components is no longer visible in the Form Assistant and Form Designer. Newly created grids should always use the default thematic formatting. It is not necessary to edit this setting except in very rare cases when supporting legacy forms that use the deprecated spreadsheet-formatting option.
- The option Use Web Client Container is no longer visible in the Form
  Properties dialog. Newly created forms should always use the container,
  since many newer features require the presence of the container to work
  correctly. It is not necessary to change this setting except in very rare cases
  when supporting legacy forms.

### **Testing and Review**

This is a display change only—supported functionality for these legacy features remains as is. Both settings still exist, and can still be edited manually on the Form Control Sheet as necessary.

## Restriction enforced on post-query sum by for Axiom queries

### Description

Axiom queries have an advanced setting that allows you to set a sum by level that applies after the initial database query is made. The purpose of this setting is to support grouping by segments, when using another advanced feature to organize Axiom query data into ranked segments. Although this was the only intended use case, the setting was not restricted and allowed entries other than the segment column.

Going forward, the **Post Query Sum By** setting for Axiom queries now only honors segment column names. If a non-segment column name is used in this setting, it is ignored and the query does not error. Segment column names are defined using special syntax in the Axiom query field definition.

### **Testing and Review**

This change should not affect any clients, since the setting still works as expected for its intended use case, and we are unaware of any other needed use case. Additionally, because it is an advanced setting that is only present on the Control Sheet, it is unlikely to have been used by accident. However, if you identify a report that no longer works as expected because a non-segment column is used in the Post Query Sum By, please contact Kaufman Hall Software Support for assistance.

#### More Info

For more information on using segments in Axiom queries, see the following topic in Axiom Software Help: *Organizing Axiom query data into ranked segments* (AX1117).

### Potential impacts on end users

This section summarizes the potential impacts to your end users when upgrading to version 2019.1. This list is provided to help you understand changes that you may need to communicate to end users. You may also need to update your internal documentation.

- The application logo, and other branding images and colors, have been updated. Users will see these changes in areas such as login screens, desktop shortcuts, and the Web Client toolbar. For more information, see the *Branding changes* section in the separate *What's New* document.
- The Report Builder page in the Web Client has been renamed to Report Designer, and the design of the page has been streamlined. Users can still open and create web reports, but the look and feel of the page is different. This affects any end users who access web reports using this page.

**NOTE:** "End users" refers to users who work with plan files and reports that have been built for them. These users do not perform any file setup activities or administration activities. It is assumed that Master System Users will fully review the release documents to understand changes that may affect them and other power users.

# Installation and technical notes

- In order to successfully complete the Axiom Application Server installation or upgrade for an onpremise system, the server must have Internet access. This access is necessary to validate the Kaufman Hall signed publisher certificate. If it is not possible to enable Internet access for the server, additional workarounds are available, as detailed in this Microsoft Support article.
- Axiom Software server components now require a minimum .NET version of 4.6.1 or higher. This
  applies to the Axiom Application Server, the Axiom Scheduler Server, and the Axiom Cloud
  Integration Service. Before upgrading any of these components, make sure that the relevant
  servers meet this requirement.
- It is required to upgrade the Axiom Cloud Integration Service when your Axiom Cloud Service system is upgraded to version 2019.1.
- As noted for previous releases, upgrading to 2019.x requires the Axiom Software database to be at 2017.1 or higher. If you are upgrading an on-premise system from 2016.4 or earlier, you must first upgrade the database to any 2017.x version before you can proceed with the 2019.1 upgrade. See the *Installation Guide* for more information. If you have a Cloud Service system, Kaufman Hall Software Support will take care of the necessary updates when upgrading your system.

# Fixed issues

The following issues were fixed in version 2019.1.

Item	Description	
14384	Issue:	Errors can occur if a table has a column that is designated as both a key column and an alternate key column.
	Status:	When a column is flagged as a key column, the alternate key property is now automatically set to False.
25657	Issue:	Imports may fail with an error if the destination table contains a self-referencing lookup column. Depending on the specific import configuration, the import may return an "invalid column" error or an error "converting varchar to bigint".
	Status:	These errors should no longer occur in this circumstance.
28732	Issue:	An error may occur when using a RangeSlider refresh variable in systems using a locale other than English.
	Status:	RangeSlider refresh variables should now work as expected in non-English locales.
29450	Issue:	An error may occur when using a Map View component in systems using a locale other than English.
	Status:	Map View components should now work as expected in non-English locales.
30562	Issue:	If a system does not have any Viewer licenses, the dashboard in the Web Client System Administration area displays this as unlimited licenses.
	Status:	The dashboard now displays 0 licenses correctly.
31529	Issue:	Time-stamped Axiom queries may refresh unexpectedly if the primary table does not have any last-modified date.
	Status:	Time-stamped Axiom queries now handle this case and will not refresh if the table has never been modified.
31963	Issue:	Imports can be created with invalid file names, which may cause the file and its folder to not be visible in Axiom Software.
	Status:	Import names are now validated to prevent this issue.
32745	Issue:	OData API fails if a customer table has a column named "Long".
	Status:	The OData API now handles this column name.

Item	Description		
33086	Issue:	In some cases, display columns may not show in file group dialogs if the column uses a multiple-level lookup path.	
	Status:	Display columns using multiple-level lookup paths should now show as expected in file group dialogs.	
33335	Issue:	OData API fails if a customer table has a column named "New".	
	Status:	The OData API now handles this column name.	
34059	Issue:	If multiple files are open in the Excel Client, and the Close Axiom icon is used to close the application, an Excel process may remain running in the background.	
	Status:	This situation should no longer occur.	

# Appendix: Version 2019.1 Patches

This section details the fixes and enhancements in patch releases for Axiom Software version 2019.1. For assistance with any patch, please contact Kaufman Hall Software Support at 888-543-6833 or support@kaufmanhall.com.

Axiom Software patches are cumulative. All fixes and enhancements included in prior patches are included in the current patch.

## Current patch: 2019.1.36

This patch contains security updates.

## Patch 2019.1.35

No platform-specific changes were made in this patch. See the separate product release notes for information on any product-specific changes.

### Patch 2019.1.34

The following issues were fixed in this patch:

• 38070: Running an Axiom query may return a syntax error if the primary table uses a reserved database name and the query also references a validated column.

### Patch 2019.1.33

The following issues were fixed in this patch:

- 37686: Custom drilling may sporadically fail when the target workbook uses GetData functions that depend on the drill parameters.
- 37865: When importing data, the routine that evaluates decimal overflow does not ignore leading negative signs.

### Patch 2019.1.29 - 2019.1.32

No platform-specific changes were made in this patch. See the separate product release notes for information on any product-specific changes.

### Patch 2019.1.28

The following issues were fixed in this patch:

• 35920: A grouping error may occur for certain uncommon Axiom query configurations when

running the query outside of normal refresh behavior, such as when previewing the query results or when executing file processing.

### Patch 2019.1.27

The following issues were fixed in this patch:

• 35932: When using the import feature to import data from multiple files, transformation statements are only being performed on data from the first file.

## Patch 2019.1.26

The following issues were fixed in this patch:

- 35514: GetData queries can cause performance issues if the table column used in the query is invalid and the target table has millions of records.
- 35565: The Submit Process and Reject Process button behaviors do not work in form plan files if the plan file does not use save locking.

### Patch 2019.1.25

The following issues were fixed in this patch:

- 35249: GetData functions unexpectedly return an error when a numeric field is used in the filter.
- 35384: Axiom queries return an incorrect syntax error when the system database is pre-SP1 SQL Server 2016.
- 35386: The OData API fails to start if the system contains a table column named Internal or Double.

### Patch 2019.1.24

The following enhancements are in this patch:

- If an Axiom form is open in the Windows Client, and the user currently owns a save lock for the form, the save lock is immediately released when the user closes the file tab.
- If a user submits or approves the current plan file process task from within an Axiom form, and the user currently owns a save lock for the form, the save lock is immediately released when the task is moved to the next step. If the user still has security permissions to save data from the form after completing the task, the user can manually re-acquire the save lock if desired.

The following issues were fixed in this patch:

• 35031: In some cases, calculated fields that use calculation types with aggregation conditions can cause query performance issues.

### Patch 2019.1.23

The following issues were fixed in this patch:

• 34877: Older file groups that have not been edited in a long time may see a blank process display

- column in the file group properties, which causes an object reference error when attempting to edit the display columns.
- 34903: An object reference error occurs when viewing the Process Directory web page, if the file group for the process has been edited to remove the Current Step column from the process display columns.
- 34929: Time-stamped Axiom queries may not process as expected after table data is updated.

### Patch 2019.1.22

The following issues were fixed in this patch:

• 34854: If an error occurs during a product package installation, all changes may not be fully rolled back as expected.

### Patch 2019.1.21

Translations for French and Dutch were updated.

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