



Release Notes
Axiom Software
Version 2019.2



KaufmanHall

AXIOM

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Introduction

Kaufman Hall is pleased to announce the release of **Axiom Software Version 2019.2**. This release features enhancements to various areas of the software, such as:

- **Axiom forms:** Enhanced PDF options for Axiom forms, including defining header and footer text, and greater control over Formatted Grid output
- **Axiom queries:** New feature to run a targeted Axiom query block by double-clicking a cell in the spreadsheet, to dynamically populate rows
- **Security:** Ability to assign subsystems and SAML authentication when importing users from Active Directory
- **Scheduler:** New Scheduler task to run a separate Scheduler job as a subordinate job, so that other tasks in the current job can wait for that job to finish and use the results of that job
- **Imports:** Ability to import data directly from Ellucian systems using an Axiom Software import utility

Version 2019.2 was originally released on June 24, 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.

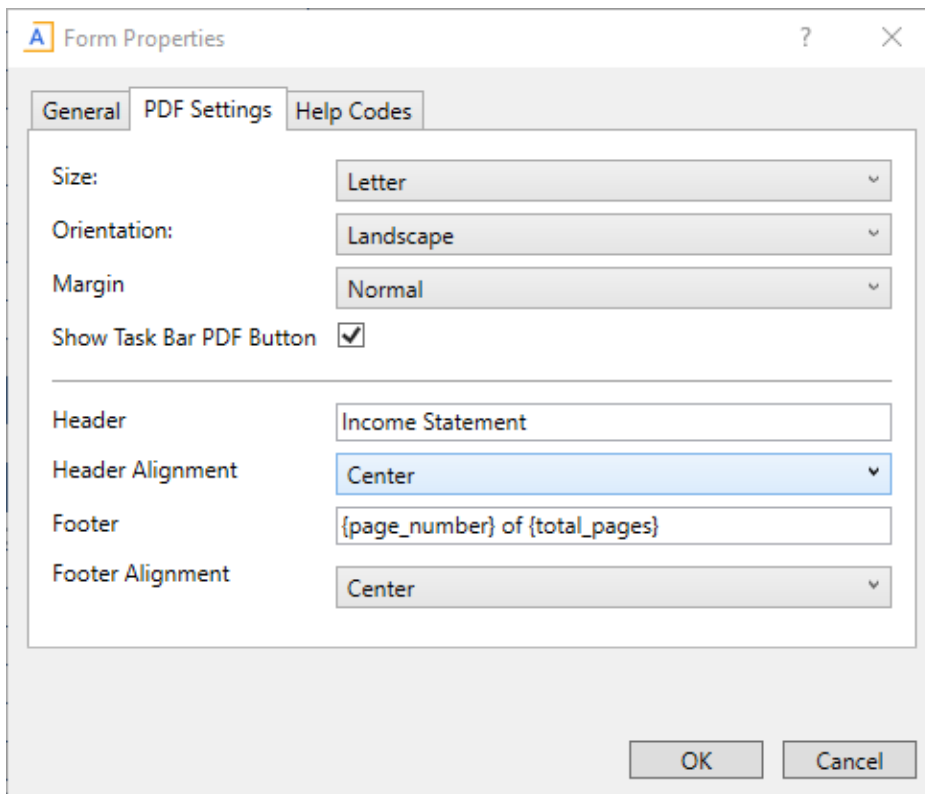
Overview of new features and enhancements

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 2019.2.

► Enhanced PDF options for Axiom forms

This release provides greater control over PDF output for Axiom forms, including:

- New form-level properties such as page margins and headers / footers
- New Formatted Grid properties to control page breaks, repeat header rows, and set column widths for PDF



The screenshot shows the 'Form Properties' dialog box with the 'PDF Settings' tab selected. The 'General' tab is also visible. The 'PDF Settings' tab contains the following options:

- Size: Letter
- Orientation: Landscape
- Margin: Normal
- Show Task Bar PDF Button: ☒

Below a horizontal separator line, the following options are visible:

- Header: Income Statement
- Header Alignment: Center
- Footer: {page_number} of {total_pages}
- Footer Alignment: Center

At the bottom right, there are 'OK' and 'Cancel' buttons.

New form-level PDF settings

► Run an Axiom query block on demand by double-clicking

Using a new Axiom function named `RunAxiomQueryBlock`, you can run individual Axiom query blocks on demand, to dynamically bring a set of rows into the sheet. You can double-click the cell with the function to run the query and populate the block, and then double-click the cell again to zero the query and delete the rows in the block.

The intent of this feature is to simulate expanding and collapsing a set of rows within the sheet, where the rows are built out using an Axiom query. It can be a good solution when the sheet may potentially contain many rows, but users only need to see one set or "block" of rows at a time.

	B	D	E	F	G	H	I	J	K	L	M	N
21												
22												
23												
24						Budget		Actual		Variance Dollars		Variance Pct.
25												
26												
27												
28			Asia	Double-click for department detail		\$25,389,065		\$23,911,875		-\$1,477,190		-5.8%
29	[AQ2;Dept.Worldregion='Asia']											
30	Asia;50000			50000 Singapore - Store 89		\$4,983,508		\$7,173,885		\$2,190,377		44.0%
31	Asia;54000			54000 Mumbai - Store 70		\$1,091,793		\$960,023		-\$131,770		-12.1%
32	Asia;65000			65000 Shanghai - Store 93		\$12,713,820		\$9,579,929		-\$3,133,891		-24.6%
33	Asia;78000			78000 Beijing - Store 100		\$6,599,944		\$6,198,037		-\$401,907		-6.1%
34	[Stop]											
35												
36												
37												
38			Europe	Double-click for department detail		\$1,761,439		\$3,407,437		\$1,645,998		93.4%
39	[AQ2;Dept.Worldregion='Europe']											
40	[Stop]											
41												
42												
43												
44			North America	Double-click for department detail		\$135,116,255		\$128,447,471		-\$6,668,784		-4.9%
45	[AQ2;Dept.Worldregion='North America']											
46	[Stop]											
47												

Example sheet configured to run Axiom query blocks by double-clicking

► Additional Axiom forms enhancements

- When using a Fixed Report component for Axiom forms, you can now combine addition and subtraction on subtotal and total rows, and you can optionally specify a sort column for dynamically generated data row sections.
- Data Grid components now automatically refresh after a save-to-database is executed for the form, without the need to configure a component dependency.
- The save locking behavior for Axiom forms has been improved to automatically release the lock in various situations, such as after closing the browser tab and after completing the current process task for a plan file.

► Other enhancements

- When importing users from Active Directory, you can now assign users to subsystems and also optionally specify SAML authentication for the imported users.
- You can now import data directly from an Ellucian system. This import type uses the Ellucian Ethos API to directly read data from Ellucian Banner systems. Ellucian is a global software and services provider for higher education.

- A new Scheduler task, Run Scheduler Job, can be used to run another job as a subordinate job within the current job. This allows you to run the job sequentially as part of the other tasks in the current job, so that you can wait for the subordinate job to complete before performing additional tasks.
- You can now configure a save-to-database block so that a specified Axiom query runs immediately before the save is processed. This can be useful when the data for the save-to-database is generated by the Axiom query, and previous saves in the file may impact the data to be returned by the Axiom query.
- The Analyze Excel Formulas test has been updated to check for all Excel functions that are not supported by the Windows Client. This test can be run using the Run QA Diagnostics command.

Upgrade considerations

Please review the considerations in this section before upgrading to version 2019.2. 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 2019.1 to the new release of 2019.2. If you are upgrading from an earlier version, please also see the release notes for the interim versions for any additional upgrade considerations.

► Advance notice: planned removal of deprecated Workflow feature

Description	<p>The Workflow feature was replaced several years ago by <i>plan file processes</i> in Process Management. Workflow was deprecated and hidden in all systems, except in existing systems that were actively using it. Since that time, it has been supported for backward-compatibility only, to give clients time to migrate to the new feature.</p> <p>We are now giving advance notice that we plan to remove the deprecated Workflow feature as of version 2020.1. Removing deprecated features helps to simplify our development and testing efforts.</p>
Testing and Review	<p>In our understanding, most or all clients have already migrated to using plan file processes. However, if any clients are still using workflow, you should migrate the workflow to a plan file process at your earliest convenience.</p> <p>If you have any concerns about the planned removal of this deprecated feature, please contact Kaufman Hall Software Support.</p>

► Advance notice: planned removal of deprecated Data Explorer feature

Description	<p>The Data Explorer feature has been deprecated in favor of the existing Web Reports feature and the developing Axiom Intelligence reporting feature. Since the introduction of the browser-based Report Builder in 2018.1, Data Explorer has been supported for backward-compatibility only.</p> <p>We are now giving advance notice that we plan to remove the deprecated Data Explorer feature as of version 2020.1. Removing deprecated features helps to simplify our development and testing efforts.</p>
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Testing and Review In our understanding, most clients have already discontinued use of Data Explorer. If you have any concerns about the planned removal of this deprecated feature, please contact Kaufman Hall Software Support.

► Removal of Auto orientation option for Axiom form PDF generation

Description When configuring an Axiom form for printing to PDF, you can specify the page orientation (portrait or landscape). In previous releases, the default orientation was **Auto**, which was intended to dynamically calculate the width to height ratio of the form and automatically use the appropriate orientation. However, this option has not worked as expected since the introduction of dynamic form and component sizing—such as the ability to fill width/height or set a percentage width/height. Instead, the option was always selecting portrait orientation and then forcing the contents to fit.

Since at this time we cannot fix the option to work as expected, the option is being removed. Going forward, you must specify either **Portrait** or **Landscape**. Landscape is now the default orientation for newly created forms. Existing forms that are set to Auto will now use Portrait, though the contents will no longer be forced to fit.

Testing and Review Most forms that are designed to be printed to PDF are likely already using either Portrait or Landscape, because in most cases Auto did not generate useful results. If you have an existing form that is often printed to PDF, you can check the PDF settings and test the output to see if you want to make any changes. You may also want to adopt some of the additional PDF enhancements that were made in this release, such as the ability to set margins and define headers and footers. For more information, see the separate *What's New* document.

► Removal of embedded forms from PowerPoint add-in

Description The ability to embed a live Axiom form or a snapshot of an Axiom form has been removed from the Microsoft PowerPoint add-in. This feature only worked in PowerPoint 2010. Differences in PowerPoint 2013 and 2016 meant the feature could not be used without manually updating the registry. Since Office 2010 is no longer officially supported, this feature is no longer useful and has been removed. The add-in can still be used with PowerPoint 2013 and up as a document management tool, to edit PowerPoint files stored in the Axiom Software file system.

We will continue to investigate new ways to enable display of Axiom Software data in PowerPoint. In the meantime, the recommended approach is as follows:

- Use the Axiom Software file processing feature to save a snapshot copy of a spreadsheet Axiom report to a designated network location. This report should contain the data that you want to display in PowerPoint.
- Use PowerPoint features to link to the snapshot file and display data in the PowerPoint.

When you need to update the data, you can generate an updated copy of the snapshot from Axiom Software and then update links in PowerPoint.

Testing and Review Most or all affected clients have already migrated their presentations to use the recommended approach, due to the need to use current PowerPoint versions. If any client is still using PowerPoint 2010 with an embedded form, it will no longer be possible to update this form or embed any new forms. If you need assistance migrating your presentation to use the recommended approach, please contact Kaufman Hall Software Support.

► Potential impacts on end users

This section summarizes the potential impacts to your end users when upgrading to version 2019.2. 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.

- Nothing to note in this release.

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

- Microsoft Excel 2019 is now officially supported for use with the Axiom Excel Client.
- Microsoft Windows Server 2019 is now officially supported for use with on-premise installations of Axiom Software server components, and with installations of the Axiom Cloud Integration Service.
- For Axiom Cloud Service systems, it is required to upgrade the Axiom Cloud Integration Service when upgrading to 2019.2.
- When Axiom forms are opened in the Desktop Client, an embedded browser is used to display the form. This browser runs using an EXE file located in the client installation directory on the local machine. If your organization was advised to whitelist this file due to issues with your anti-virus software, the exclusion rule must be updated to account for the new name of the file. In previous releases, the file name was `EOPW.exe`, which contained an accidental misspelling of the original file name. Going forward, the file name is `EOWP.exe`.

Fixed issues

The following issues were fixed in version 2019.2.

Item	Description
16151	<p>Issue: When a Scheduler job contains many variables, the list of values gets cut off in the job results.</p> <p>Status: The Web Scheduler interface has been updated to show all variables in the job results. The list may still be cut off when viewing job results in the Desktop Client.</p>
20348	<p>Issue: When a form is open as a web tab in the Desktop Client, printing to PDF does not capture the current state of the form—instead, the PDF reflects the initial state of the form as if it were newly opened.</p> <p>Status: Printing to PDF from the Desktop Client now captures the current state of the form as expected.</p>
23125	<p>Issue: When using Email Snapshot to email a PDF copy of the current spreadsheet Axiom file, the generated PDF is invalid.</p> <p>Status: The generated PDF in this case is now valid. Additionally, the Windows Client now supports PDF generation when using Email Snapshot.</p>
25327	<p>Issue: When using the Tag User list to tag a user in a Message Stream comment, the user name gets inserted twice.</p> <p>Status: The user name is now only inserted once as expected.</p>
29144	<p>Issue: When a report is opened from the Browse Reports Library dialog using the right-click context menu, the report is non-responsive.</p> <p>Status: The report now opens as expected.</p>
29852	<p>Issue: The Open Plan Files dialog cannot be filtered on Boolean values when the system language is French.</p> <p>Status: Dialogs that use Axiom grid controls can now be filtered on Boolean values when the system language is French.</p>
33914	<p>Issue: If a Cloud Integration Service is limited to certain accessible folders, an error occurs when attempting to browse to the source file in imports that use a remote data connection.</p> <p>Status: The accessible folders can now be browsed as expected in imports.</p>
34593	<p>Issue: Using File Collect to email a PDF file generates an invalid PDF file.</p> <p>Status: This process now generates a valid PDF file.</p>

Item	Description
34860	<p>Issue: If a user with the Administer Tables permission has a write filter on a table, that user cannot copy data to that table using Copy Table Data.</p> <p>Status: The Administer Tables user can now copy data to the table, within the user's write filter.</p>
34919	<p>Issue: The setting to refresh the Control Sheet between each Axiom query does not work when used to enable or disable Axiom queries.</p> <p>Status: Axiom queries can now be enabled/disabled based on the results of another query when this setting is enabled.</p>
35132	<p>Issue: When installing the Axiom Desktop Client, if the Axiom shortcut folder for the Start menu doesn't already exist, the installation fails to create it.</p> <p>Status: The client installation now creates the shortcut folder for the Start menu as expected.</p>
36311	<p>Issue: Certain data source tags for the Data Grid component are case-sensitive.</p> <p>Status: These tags are no longer case-sensitive.</p>

Appendix: Version 2019.2 Patches

This section details the fixes and enhancements in patch releases for Axiom Software version 2019.2. 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: 2019.2.31

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

▶ Patch 2019.2.30

The following issues were fixed in this patch:

- 41616: Process actions such as submitting a plan file may fail after running an Axiom query against the Axiom.ProcessEvents table, within the same client session.

▶ Patch 2019.2.29

This patch contains security updates.

▶ Patch 2019.2.27 - 2019.2.28

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

▶ Patch 2019.2.26

The following issues were fixed in this patch:

- 39619: When running batched Axiom queries, there is a small chance that sheet filters may not be read correctly.

▶ Patch 2019.2.24 - 2019.2.25

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

► Patch 2019.2.23

The following issues were fixed in this patch:

- 37685: Custom drilling may sporadically fail when the target workbook uses GetData functions that depend on the drill parameters.
- 38071: 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 2019.2.22

The following issues were fixed in this patch:

- 37613: Launching a dialog panel using the Show Form Dialog Panel command may cause a "sequence contains more than one matching element" error in the form.
- 37851: Axiom Network Speed Test does not complete when started from the web page.
- 37866: When importing data, the routine that evaluates decimal overflow does not ignore leading negative signs.

Additionally, a system configuration setting was added to assist Kaufman Hall Software Support in troubleshooting certificate errors.

► Patch 2019.2.21

The following issues were fixed in this patch:

- 36941: Inserting calc methods in form-enabled files is slow.

Additionally, translations for various languages were updated.

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