Web Client User Guide

Axiom Software

Version 2019.3

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Introduction

Axiom Software is an enterprise performance management application with full-featured planning and reporting functionality. Once the system has been configured to your organization's requirements, plan files and reports are made accessible to end users. This guide explains how to work with web-enabled plan files and reports that have already been created by administrators and other power users.

Intended audience

This guide is intended for all users of Axiom Software.

What is covered in this guide?

This guide covers the following:

- Introduction to the Web Client user environment, including menus and basic navigation
- How to use Axiom forms
- How to use plan file process features

What is not covered in this guide?

The following related topics are not covered in this guide:

- Basics of using the Desktop Client. For more information, see the *Desktop Client User Guide*.
- Creation and use of web reports and the Report Designer. For more information, see the *Web Reports Guide*.
- Administration or file setup activities. For more information, see the other guides delivered with the system.

All documentation for Axiom Software can also be accessed using the Axiom Software Help Files.

Axiom Software Client applications

Users interact with Axiom Software using either the Desktop Client or the Web Client.

Desktop Client

The Desktop Client is the general name for the Axiom Software application that runs on the client desktop. The Desktop Client provides access to spreadsheet-based plan files, reports, and other supporting files. The Desktop Client also provides access to full administration features for the Axiom Software platform, including managing security, Scheduler, tables, imports/exports, file groups, and more.

There are two different versions of the Desktop Client:

- **Excel Client.** The Excel Client provides access to all Axiom Software features within a Microsoft Excel interface.
- **Windows Client.** The Windows Client uses a .NET-based engine to emulate the spreadsheet environment without requiring Microsoft Excel. It provides full access to Axiom Software features, but certain spreadsheet features are limited.

Kaufman Hall recommends the Windows Client as the primary client application for all users who need access to the Desktop Client. Generally speaking, use of the Excel Client should be reserved for spreadsheet file development, due to the easy access to full spreadsheet functionality.

Web Client

The Web Client provides browser-based access for Axiom Software, limited to certain web-enabled features. The Web Client does not provide any spreadsheet functionality.

Using the Web Client, end users can access browser-based plan files and reports. Certain administration features are also available in the Web Client, such as limited Scheduler and table management.

This guide discusses functionality that is available in the Web Client.

2

Web Client Basics

This section discusses the basics of working with the Axiom Web Client. The Web Client is the browser-based client for Axiom Software. The Web Client supports cross-platform distribution of browser-based reports and plan files to end users. It also provides access to a limited set of administration features for system administrators and other power users.

The Web Client does not require any software installation. The only requirement is a supported browser.

Home page

All users have a home page that opens automatically when you log into Axiom Software.

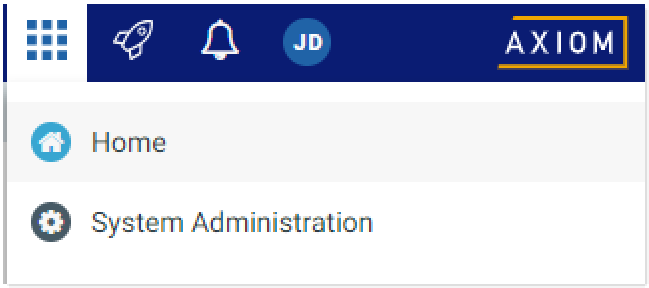
The contents of your home page may vary depending on the security roles you belong to and the products that you have access to. Additionally, clients can customize their home page as needed to show various types of information such as announcements, links to important files, and charts and graphs. If you have any questions about your home page, please contact your system administrator.

Web Client home page

Depending on your system, the Web Client home page may be one of the following:

- A product-specific home page for an installed Axiom Software product
- A custom home page created specifically for your organization
- The default Axiom Software home page

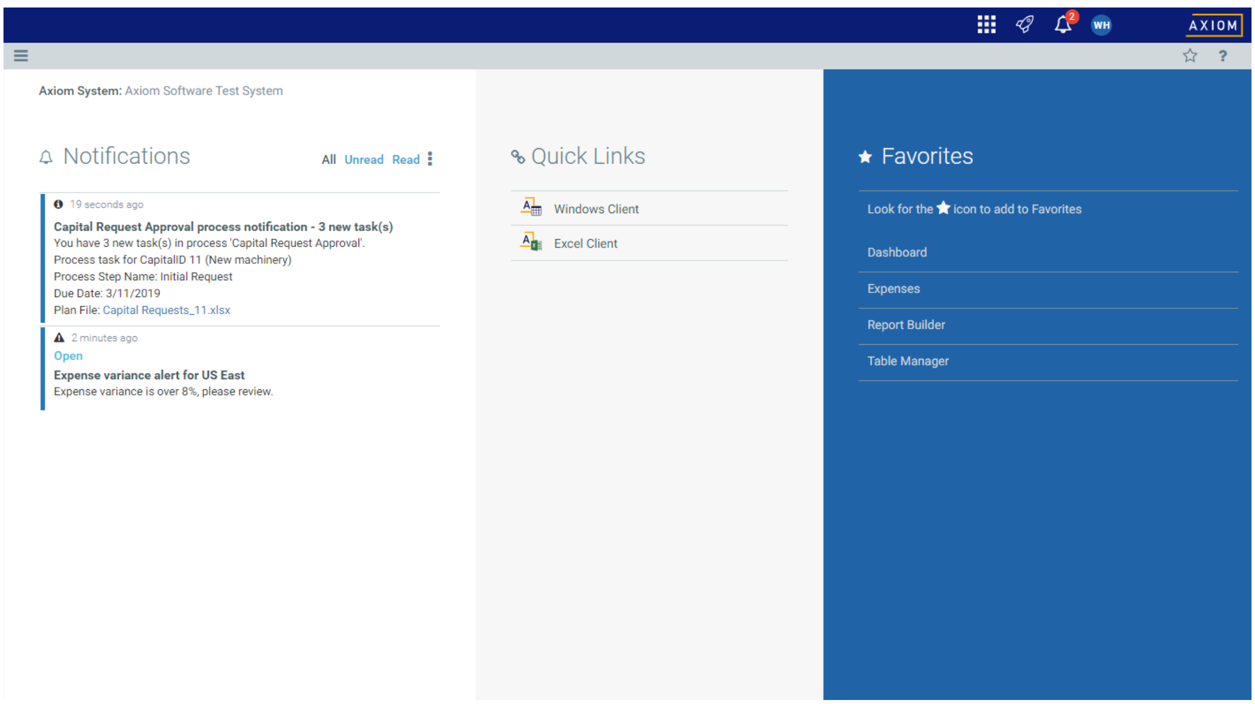
If you navigate away from the home page, you can return to it by using the Area menu in the Global Navigation Bar:



Home option on Area menu

If you are in a system with installed products, the Area menu may contain product names instead of the **Home** item. In that case, you can select a product name to return to the home page for that product.

If a user does not have an assigned browser-based home page, then the Web Client displays a default home page. The default home page displays notifications, favorites, and quick links.



Example default home page

This default home page can also be accessed (by any user) by going to the following URL:

Example On-Premise URL	`http://`*`ServerName`*`/Axiom/Home/Launchpage` Where *ServerName* is the name of the Axiom Application Server, and Axiom is the default name of the virtual directory.

Example Cloud System URL	`https://ClientName.axiom.cloud/Home/Launchpage` Where *ClientName* is the name of your Axiom Cloud Service system.

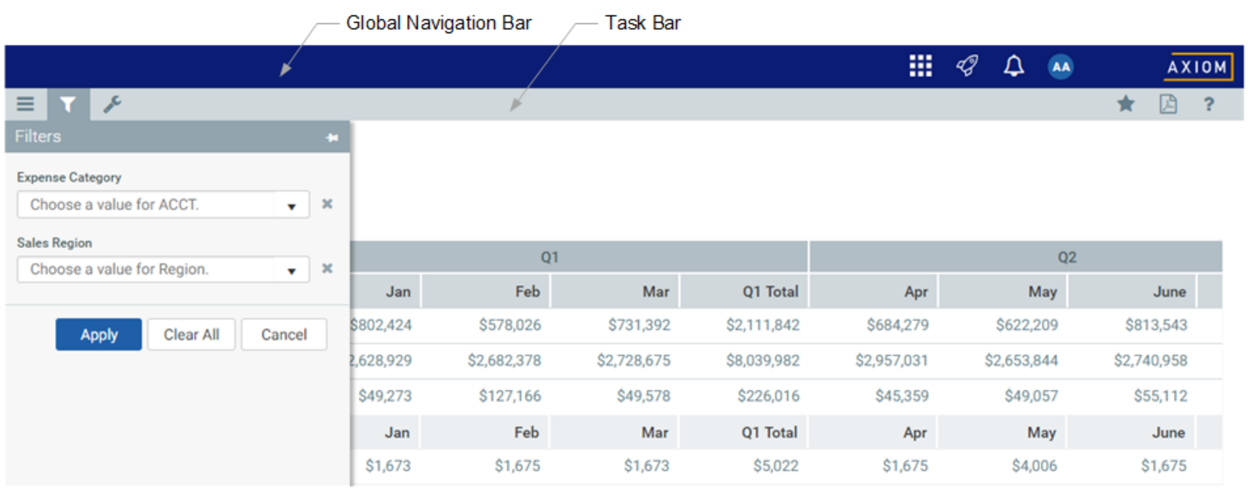
This page has the following features:

- **Notifications**: You can read and delete notifications using the same features available in the Notifications panel.
- **Quick Links**: You can use a set of global quick links that are displayed here for easy access. These links are built-in to the page and cannot be customized. However, the link to the Excel Client may not be present if your system has been configured to hide it.
- **Favorites**: You can open and delete web favorites.

Web Client overview

Most Web Client features and navigation can be accessed using the two bars across the top of each page:

- **Global Navigation Bar**: The bar at the top of the page provides access to system-level areas and features.
- **Task Bar**: The gray bar underneath it provides access to various features that are specific to the current area, page, or document.



The Global Navigation Bar and the Task Bar are available everywhere in the Web Client except as follows:

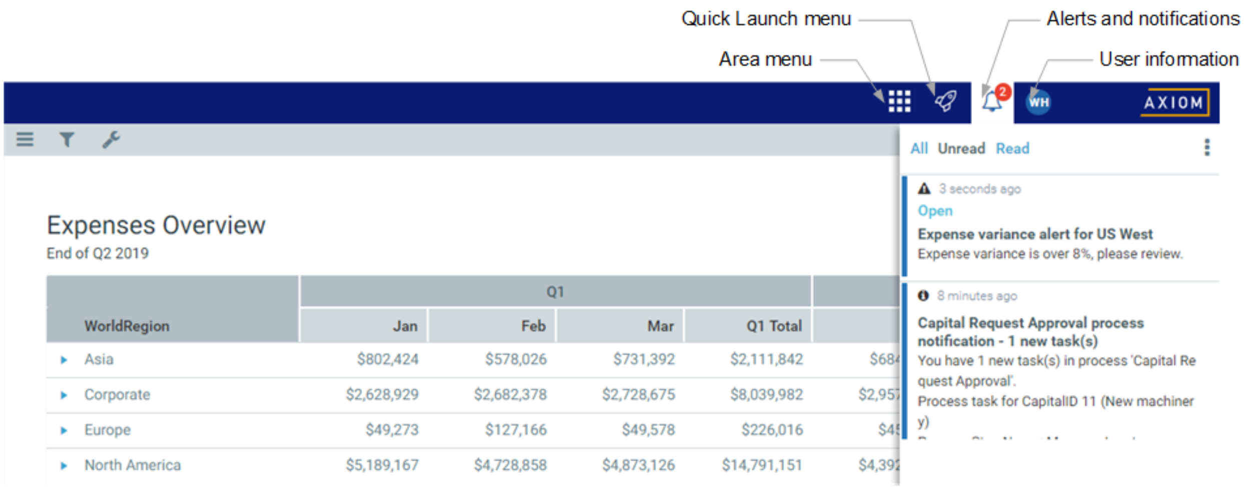
- All areas of the Data Explorer use an older web interface. The Data Explorer has been de-emphasized in favor of the Report Designer. Although you can still use the Data Explorer, it will not be further enhanced.

- Axiom forms that do not have the Web Client Container enabled. Generally speaking, this would only be the case for legacy forms that have not yet been migrated to use the newer web interface that was first introduced in version 2016.1.

Global Navigation Bar

The Web Client Global Navigation Bar provides access to various system-level areas and features. Using this bar, you can:

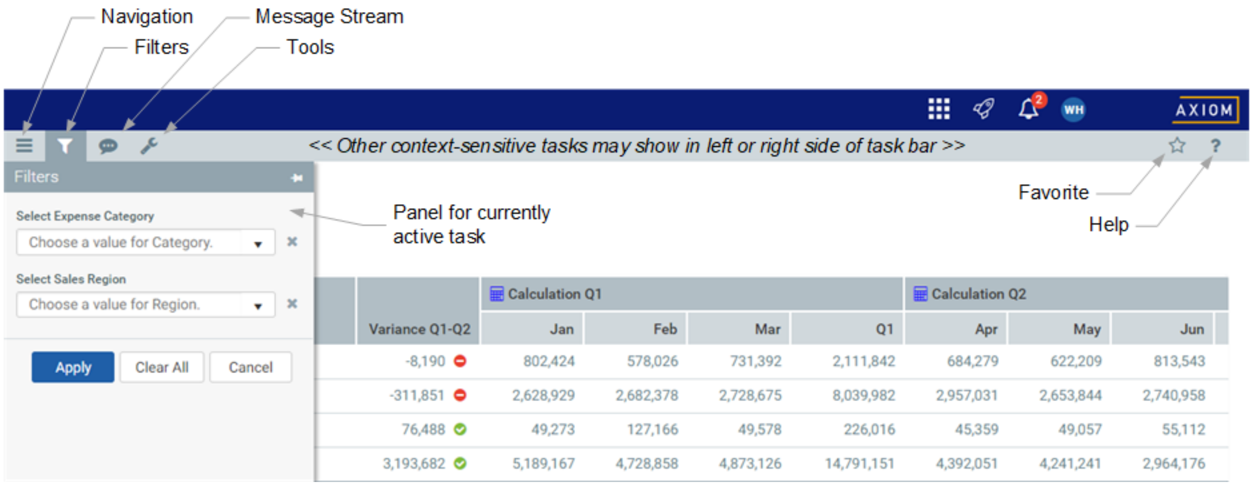
- Navigate to home, system administration, and various products (if applicable)
- Launch various client applications
- View alerts and notifications from various system processes and features
- View user information, configure session settings, and log out



Task Bar

The Web Client Task Bar provides access to various features that are specific to the current area, page, or document. Using this bar, you can:

- Navigate to your browser-based files and related areas of the Web Client
- Filter the data shown on the current page
- Comment on the current document and review comments from others
- Access tools relating to the current document or area
- Save the current page or document as a favorite
- View help for Axiom Software or for the current document
- Perform other context-sensitive tasks such as managing attachments or working with the Report Designer



The left-hand side of the task bar contains a task toolbar. You can click on any icon in this toolbar to open the panel for the associated feature. For example, clicking the filter icon opens the Filters panel. Clicking the icon again closes the panel.

The panel can be pinned or unpinned using the pin icon in the top right of the panel. If the panel is unpinned, the panel overlays the current page contents, and clicking on the page closes the panel. If the panel is pinned open, then the form is pushed to the side so that the panel contents and the form can be viewed at the same time. When pinned, clicking on the page does not close the panel—you must unpin the panel or click the toolbar icon again to close the panel.

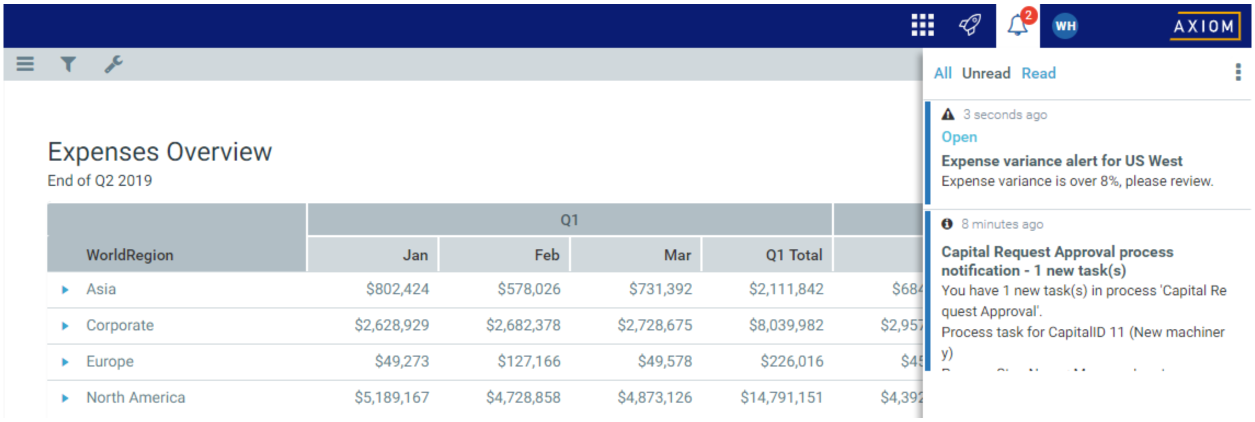
The contents of the task bar vary depending on the current page or document. For example, the Message Stream and the Filters panel are only available if they have been enabled for the current document. If a particular feature is not available for a particular document or area, then either it has not been enabled or it does not apply.

Viewing notifications in the Web Client

If you receive a notification in Axiom Software, you can view it in the Notifications panel. Notifications can come from the following sources:

- **Alert notifications.** Your system administrators and other power users may have set up alerts to monitor certain alertable conditions and then notify specified users.
- **Process management notifications.** These notifications result from active processes in process management, such as to inform you that you have a new task in the process.
- **Message stream notifications.** If you have subscribed to a document's message stream, you will be notified of any new comments made about that document.
- **Axiom system processes such as Process Plan Files.** If you have triggered certain system processes, Axiom Software will notify you when the process is completed or when errors occur.

To open the Notifications panel, click the Notifications icon in the Global Navigation Bar.



Example Notifications panel

If you have new, unread notifications when you first log in, or if you receive new notifications during a current session, a red number displays on the Notifications icon. Unread notifications are indicated by a blue bar along the left-hand side of the notification. Once a notification has been read, the bar is removed.

NOTES:

- Your notifications may also display on your home page. If so, the notifications can be read and managed using the same features described here.
- All notifications displayed in the Notifications panel are also available in the Notifications task pane of the Desktop Client. Both areas read from the same source of notifications, and edit the same source as well. If you mark a notification as read in one area, or delete a notification from one area, the other area will reflect these changes.

Reviewing notifications

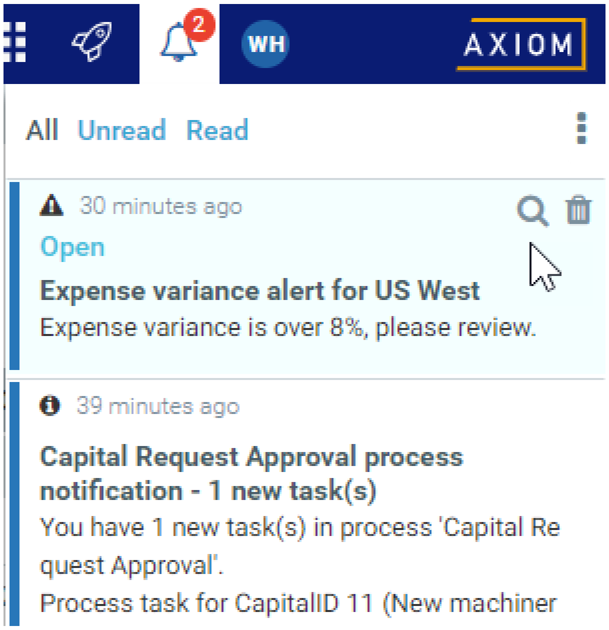
Within the panel, notifications are listed in the order they were received, with the newest notifications at the top. You can click the **All**, **Unread**, and **Read** links at the top of the panel to indicate which notifications you want to see in the panel. By default, the panel shows all notifications. When you click on a notification, it is automatically marked as read.

Notifications may display with the following icons:

- Notification about a comment posted to the Message Stream.
- Notification with "information" priority.
- Notification with "warning" priority.
- ! Notification with "error" priority.

If the notification contains more content than can be displayed within the summary view, then you can view the full notification as follows:

- Hover your cursor over the notification to display the action icons at the top right.



- Click the magnifying glass icon to open the full notification in a dialog.

Additionally, some notifications contain links to documents that you can open for more information.

Notification actions

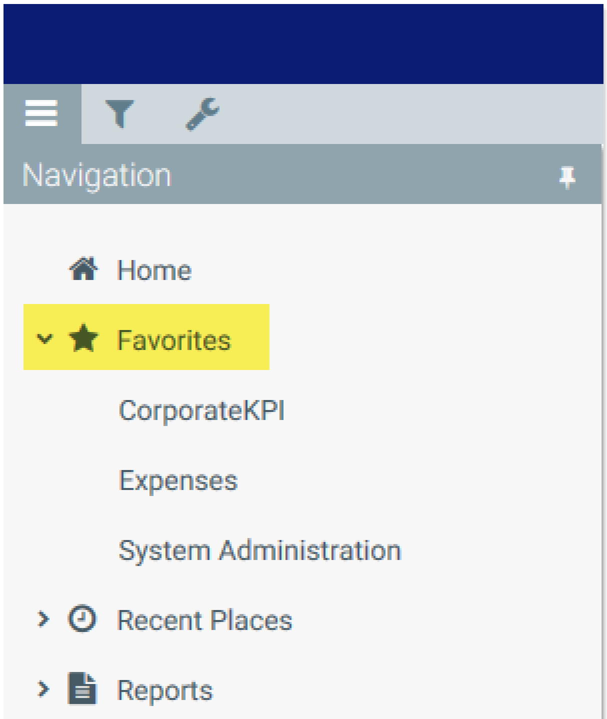
Hover your cursor over the menu icon in the top right of the Notifications panel to perform the following actions:

- **Select All**: Select all notifications that are currently showing in the panel.
- **Mark Read**: Mark the selected notifications as read.
- **Mark Unread**: Mark the selected notifications as unread.
- **Delete**: Delete the selected notifications. Keep in mind that once a notification has been deleted, you cannot undo this action. You can also delete a notification by hovering your cursor over the notification, then clicking the delete icon .

Managing favorites in the Web Client

You can save Axiom files and Web Client pages as favorites, for quick access to commonly used items. Your favorites list is available in the following locations:

- The Navigation panel
- The default Web Client home page



Example favorites in Navigation panel

Your favorites list displays any favorites that you have saved in the Web Client. It also displays web-enabled favorites that you have saved in the Desktop Client (meaning favorites to individual Axiom forms or web reports). Other favorites saved in the Desktop Client do not display in the Web Client (including folders saved as favorites, even if the folder contains web-enabled files).

Saving favorites

To save the current document or page as a favorite in the Web Client, click the star icon in the right side of the Task Bar. The star icon toggles from outline (not a favorite) to filled (a favorite).

Favorite icon in Web Client task bar

Once a favorite has been saved, it displays in your favorites list in the Web Client and in the Desktop Client. You can use the saved favorite to quickly open the document or page.

Web favorites are saved using the name shown in the browser tab. Web reports and Axiom forms support the ability to define a title that displays in the browser tab, which means the title may be different than the file name. If the title is changed after the favorite is saved, the favorite does not update to show the changed title (however, the favorite still works to open the specified document).

Currently, the Web Client does not support the ability to rename or reorder web favorites, or to organize web favorites into folders. Web favorites display as a flat list, in alphabetical order. However, if you rename a favorite in the Desktop Client, the Web Client updates for the new name.

NOTES:

- When favorites are saved in the Web Client, they are saved as URLs instead of as document shortcuts. This allows you to save any page in the Web Client as a favorite, not just documents. For example, if you have access to the Audit Manager, you can save that as a favorite for quick access to the page. However, if the name of your Axiom Software virtual directory ever changes (which should be a rare occurrence), the web favorite will no longer work.
- If a web favorite points to a document, and that document is later moved or renamed, the favorite will continue to open that document (but the favorite name is not updated).
- If you organize web favorites into a folder using the Desktop Client, the folder will display in the favorites list in the Web Client Navigation panel. However, the favorites list is flattened for display in the Web Client home page.

Deleting favorites

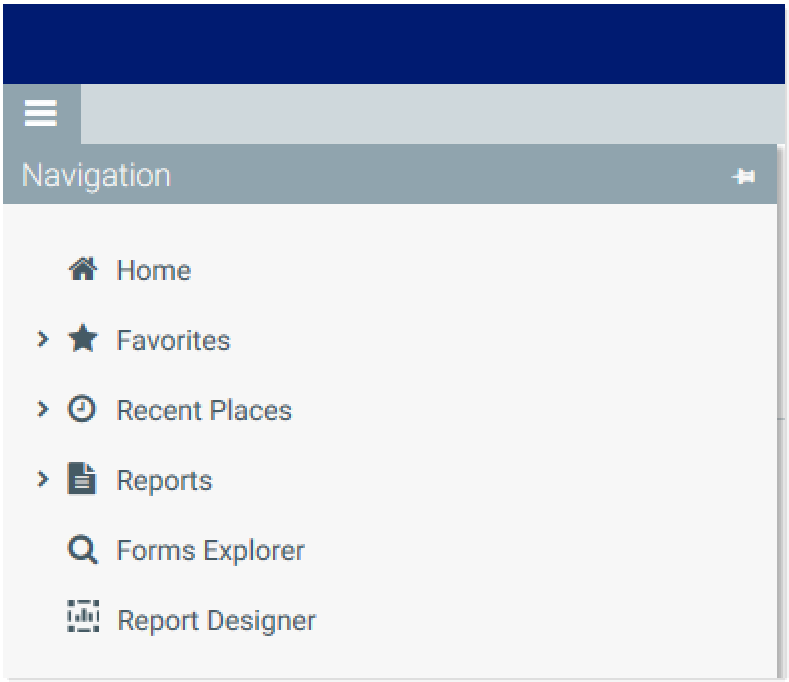
To delete a favorite, hover your cursor over the favorite name (in either the Navigation panel or your home page), then click the delete icon. The favorite is deleted in the Web Client and in the Desktop Client.

If the document or page for an existing favorite is deleted, the favorite is not automatically deleted. If you try to use the favorite, you are informed that the document or page cannot be found. In this case you must manually delete the favorite.

Navigation panel

Using the Navigation panel, you can navigate to your documents and to various areas of the Web Client.

To open the Navigation panel, click the menu icon in the left side of the Task Bar. To navigate to an area or document listed in the panel, click on the item.



Example Navigation panel

The Navigation panel updates dynamically to show the available navigation links for the currently active area of the Web Client. The following areas are available:

Area	Description
Default	Axiom Software provides a set of standard navigation links that show by default when you are in the Web Client. The previous screenshot shows the standard navigation links. These links provide access to your favorites, recent places, web-enabled reports and forms, and the Report Designer. The standard navigation links can be customized, so each client's system may look different. Navigation links can only be customized by administrators using the Desktop Client.
System Administration	The system administration links show when you are in the System Administration area, and provide access to features such as the Table Manager, Audit Manager, and software updates.
Product-Specific	Systems with installed products may have product-specific web navigation links. When you select a product name from the Area menu in the Global Navigation Bar., the product-specific links display in the Navigation panel. For more information, see the product-specific documentation.

Additionally, when you open a report or other browser-based document, that document may be associated with a set of document-specific navigation links. These links are added to the Navigation panel while you are in that document.

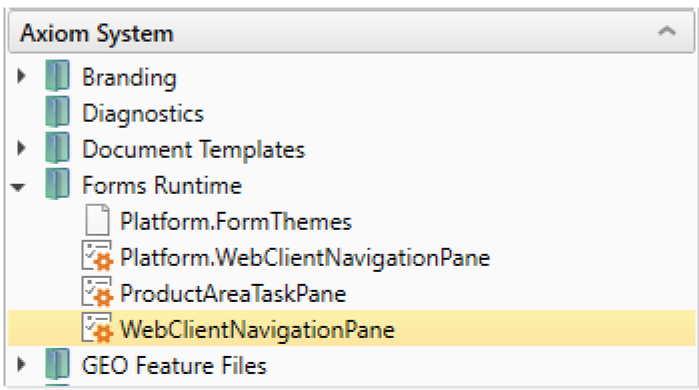
Updating the Navigation panel after upgrading from 2018.2 or earlier

If your organization has newly upgraded Axiom Software, and you were previously running version 2018.2 or earlier, action is required in order to update your Navigation panel. Only administrators can perform this update, using the Desktop Client.

NOTE: It is not necessary to manually update the Navigation panel if your system uses installed, upgradeable products. In this case, your task pane will be automatically updated when you install the latest product package.

The default Navigation panel was updated in version 2018.3 to include links to the Report Designer and Forms Explorer, which are intended to replace the links that used to be present on the removed Launch page. The default Navigation panel was also updated to include icons, for a more attractive appearance.

The contents of the Navigation panel are controlled by the `WebClientNavigationPane.axl` file, located in the following folder: `\Axiom\Axiom System\Forms Runtime`. This is a custom task pane file that gets rendered in the Navigation panel of the Web Client.



Because the contents of the Navigation panel are customizable, Axiom Software does not automatically overwrite this file when updates are made. Instead, the most current version of the file is placed in this folder as `Platform.WebClientNavigationPane.axl`. In brand new systems, both files are the same, but in existing systems only `Platform.WebClientNavigationPane.axl` has the latest updates.

If your organization has not customized `WebClientNavigationPane.axl`, then you can update your system as follows:

1. Delete `WebClientNavigationPane.axl`.
2. Copy `Platform.WebClientNavigationPane.axl`.
3. Rename the copy to `WebClientNavigationPane.axl`.

Once you have done this, the Navigation panel in your system will look exactly like the example shown above. You can use it as is, or customize it as desired.

If your organization has customized `WebClientNavigationPane.axl`, then you have two choices:

- You can replace `WebClientNavigationPane.axl` as described previously, then remake your customizations in the new file. This may be easier if you have only made minor customizations.

  OR

- You can update your customized version of `WebClientNavigationPane.axl` to include links to the Report Designer and Forms Explorer as desired. You can also include icons. You can review `Platform.WebClientNavigationPane.axl` to see how these links and icons are set up.

> **IMPORTANT:** If you do not update `WebClientNavigationPane.axl`, then your users will not have built-in navigation to the Report Designer or the Forms Explorer in the Web Client. Users can still access either URL directly. The Report Designer remains accessible from the Desktop Client regardless.

Updating the Navigation panel after upgrading from 2018.3 or 2018.4

In 2019.1, we changed the name of the Report Builder page to Report Designer. If you updated `WebClientNavigationPane.axl` as described in the previous section in 2018.3 or 2018.4, your Navigation panel will continue to show the old term Report Builder. This is a display issue only—the item will navigate to the correct page even though the label uses outdated terminology.

If you want to update the terminology in the Navigation panel, you can update `WebClientNavigationPane.axl` using the same process described in the previous section. You can overwrite the file with a copy of `Platform.WebClientNavigationPane.axl`, or you can simply edit the file to update the display text for the Report Builder item.

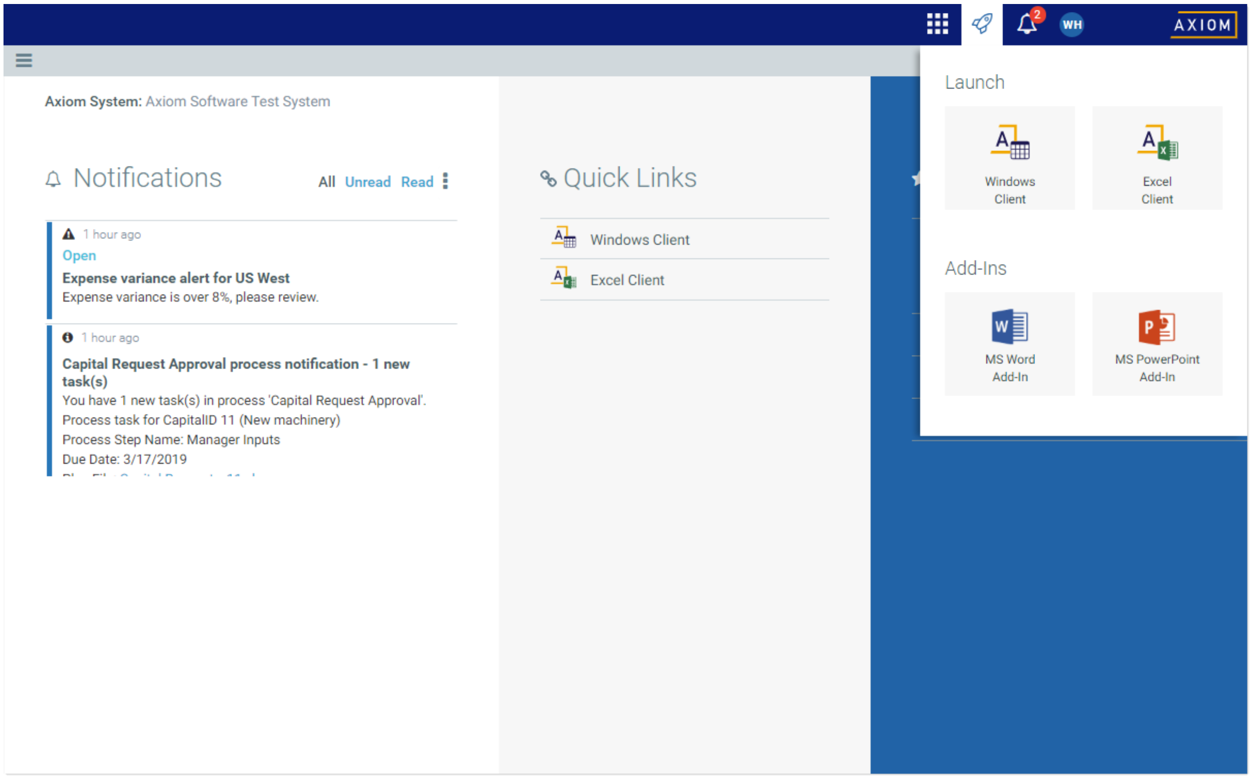
Launching Axiom Software applications

You can launch various Axiom Software applications from the Web Client Quick Launch menu, including the Axiom Excel Client and Axiom Windows Client.

The Quick Launch menu serves the following purposes:

- Users can install applications from this area as needed. Afterward, they can continue to launch installed applications from this location, or they can use other options (such as a shortcut on their desktop).
- For systems using SAML or OpenID authentication, this is the only option for users to launch installed applications. SAML and OpenID authentication require users to be authenticated using the Web Client before they can launch a desktop application.
- Users can install and launch add-ins such as the add-ins for Microsoft Office applications.

To open the Quick Launch menu, click the Quick Launch icon in the Global Navigation Bar.



Quick Launch menu

▶ Launching the Axiom Desktop Client

Using the Quick Launch menu, you can launch the Axiom Desktop Client. Click on one of the following icons:

Item	Description
Windows Client	Launches the Axiom Windows Client on your desktop.
Excel Client	Launches the Axiom Excel Client on your desktop. Requires Microsoft Excel. **NOTE:** This option may not display in the menu, in which case you should use the Windows Client as your desktop client.

If the client is not already installed on the current workstation, clicking the icon will initiate the install and then launch the client. If the client is already installed, clicking the link will launch the client. You must be using Microsoft Edge or Internet Explorer 11 (or higher) to perform these actions. Other browsers may be able to install and launch the client if a ClickOnce extension is applied to the browser.

The appropriate client to use depends on your organization's preferences and on your user role. Your organization will provide instruction as to which client you should use.

For more information on installing the Windows Client and Excel Client, including prerequisites and configuration details, see the Installation Guide (on-premise systems) or the Cloud Service Technical Guide (cloud service systems). Some software prerequisites can be downloaded and installed from the Web Client. You can access the prerequisites download page from the Axiom Software About box.

NOTE: The default home page also contains links to launch the Windows Client or the Excel Client.

Launching add-ins

Using the Quick Launch menu, you can launch Axiom Software add-ins. Click on one of the following icons:

Item	Description
MS Word Add-In	Launches the Axiom Software Add-In for Microsoft Word.
MS PowerPoint Add-In	Launches the Axiom Software Add-In for Microsoft PowerPoint.

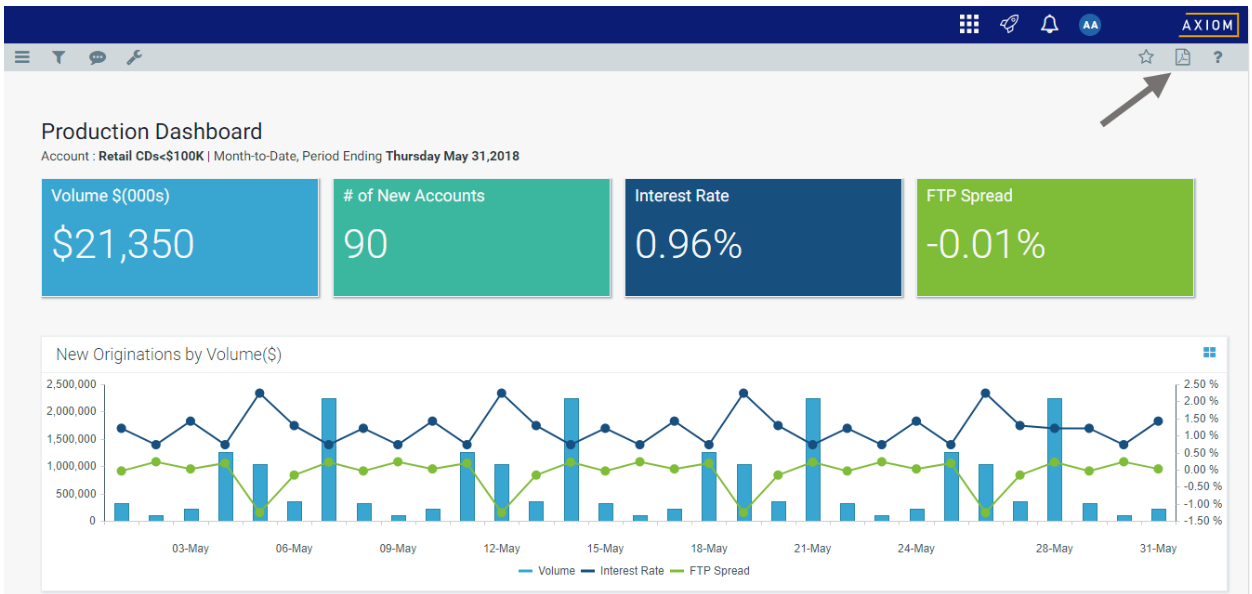
NOTE: One or both add-ins may not display in the menu, depending on your organization's preferences.

The Word and PowerPoint Add-ins are optional applications to support document integration between Axiom Software and Word or PowerPoint.

3

Using Axiom forms in the Web Client

Axiom files, such as plan files and reports, can be web-enabled so that you can access them in the Axiom Web Client. Web-enabled files are known as *Axiom forms*. Using Axiom forms, you can view reporting data and make planning inputs using an HTML5 web page instead of a spreadsheet.



The contents of the form itself and what you can do with it is entirely up to the form designer. Forms can be used for many different purposes—from basic reports and input forms, to complex dashboards and plans with rich interactivity. Ideally the form should include embedded instructions as needed, so that the purpose of the form and what you can do with it is clear. If you have any questions about a form, you should contact the designated contact person for the form (if provided) or contact your system administrator.

NOTE: Axiom forms are designed in the Axiom Desktop Client (Excel Client or Windows Client). The Web Client only supports viewing and interacting with existing forms; new forms cannot be designed in the Web Client environment. For more information on designing forms, see the *Axiom Forms and Dashboards Guide*.

Opening Axiom forms

In the Web Client, Axiom forms can be opened in the following ways:

- Using predefined hyperlinks in your home page (and in subsequent forms that you may open)
- Using the Plan File Directory page (plan files only)
- Using the Web Client navigation panel
- Using the Axiom Forms Explorer page, to view all forms that are available to you

Using a home page

Your system may have a form home page that is designed to enable navigation to all other forms that you need to access. Hyperlinks within the home page (and in other forms) may open within the current browser tab, or they may open in a new tab. This is configured by the form designer. For more information, see Home page.

Using the Plan File Directory page

Using the Plan File Directory page, you can open the plan files that you have permission to access for a particular file group. For more information on this page, see Opening plan files using the Plan File Directory.

Using the Web Client Navigation panel

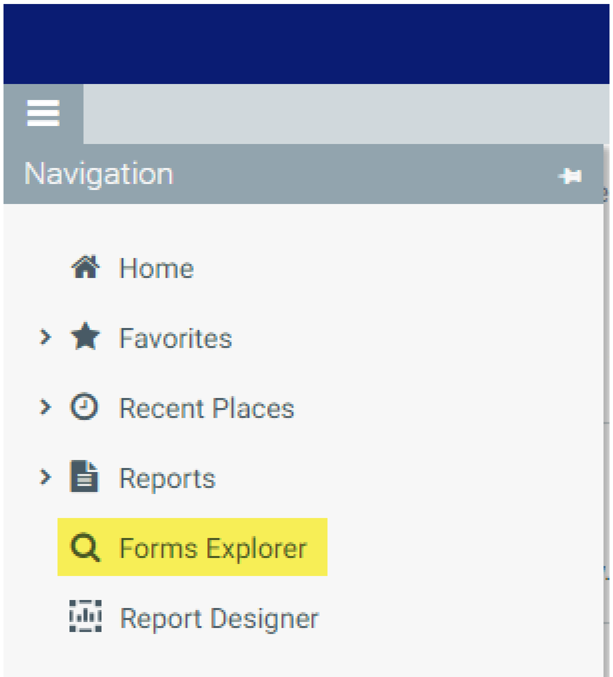
By default, the Navigation panel contains links to the Axiom forms and web reports that you have rights to access. The Navigation panel may be customized for use in your system. If your system has installed products, the Navigation panel may be designed to contain links for the currently active product. For more information, see Navigation panel.

Using the Forms Explorer page

The Forms Explorer page in the Web Client provides a built-in way to access all Axiom forms that are available to you.

To access the Forms Explorer:

- Click the menu icon in the left side of the Task Bar to open the Navigation panel, then select **Forms Explorer**.



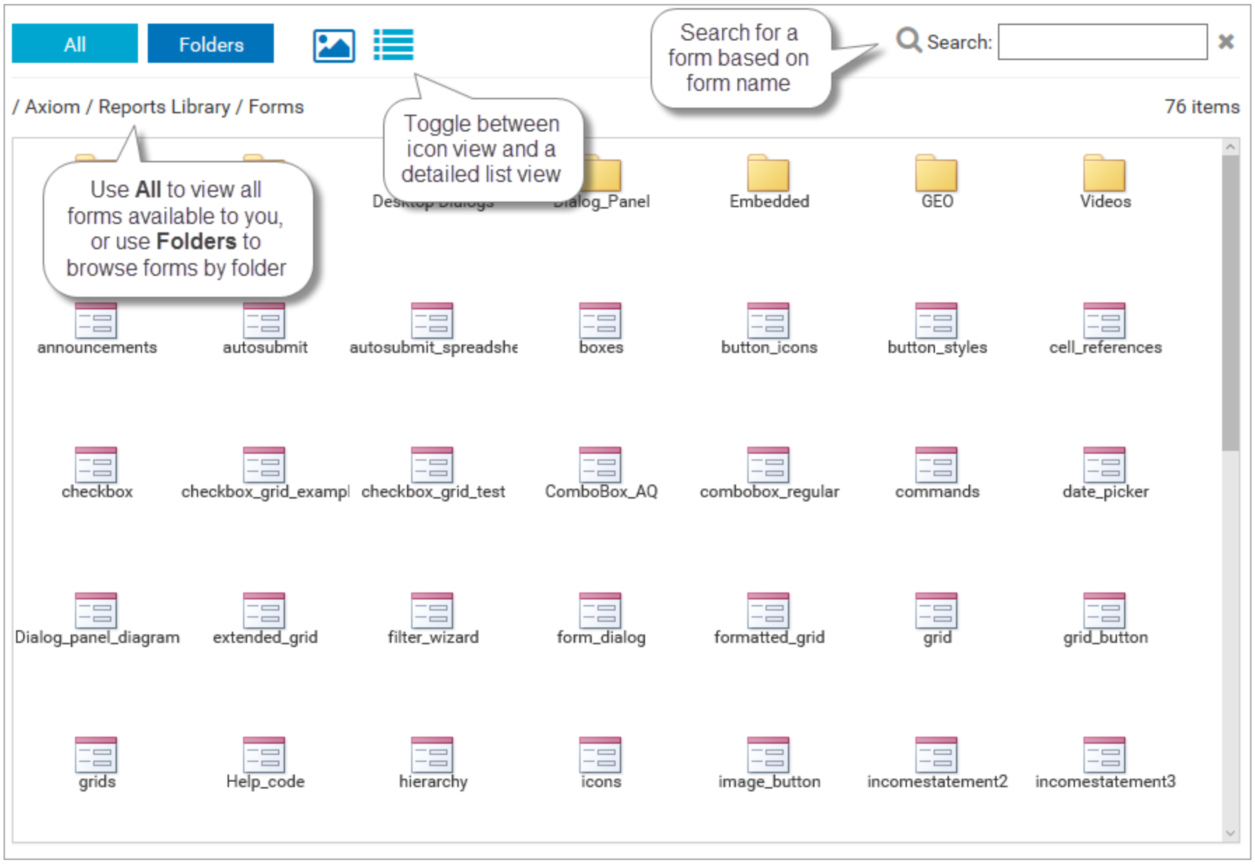
The Forms Explorer is available in the Navigation panel by default, however, the contents of this panel can be customized. If necessary, you can also access this page directly using the following URL:

Example On-Premise URL	`http://`*`ServerName`*`/Axiom/Forms` Where *ServerName* is the name of the Axiom Application Server, and Axiom is the default name of the virtual directory.
Example Cloud System URL	`https://`*`ClientName`*`.axiom.cloud/Forms` Where *ClientName* is the name of your cloud service system.

From the Forms Explorer page you can:

- Use the **All** view to see all Axiom forms that you have permission to access.
- Use the **Folders** view to browse Axiom forms by folder. Depending on the system and your file permissions, you may have available Axiom forms in the Reports Library, in various file group folders, and in My Documents.
- Use the **Search** box to find Axiom forms based on their name.

When viewing lists of Axiom forms, you can switch between Icon View and Detail View. To open an Axiom form from this location, click it.

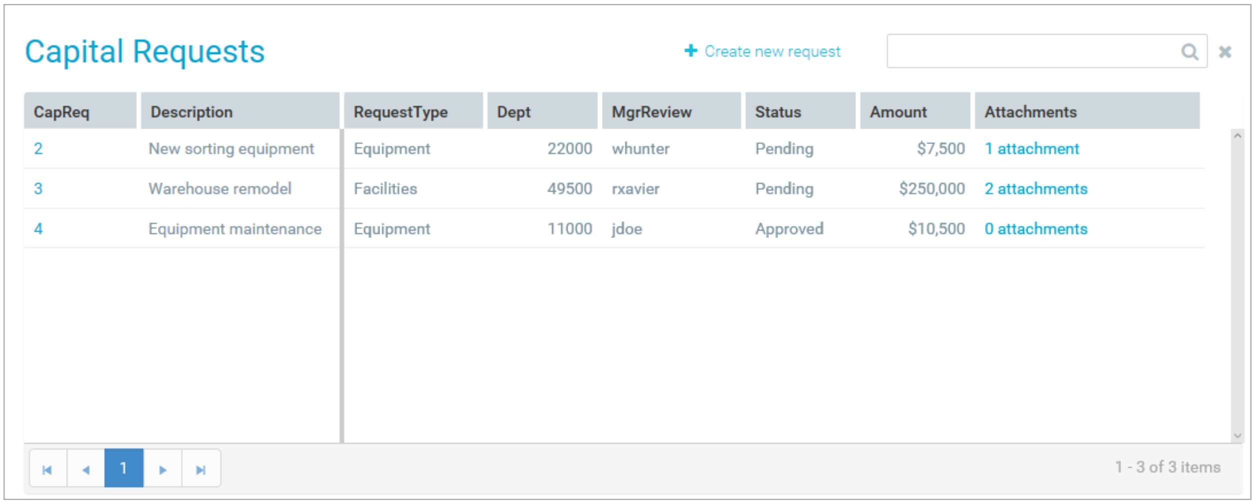


Opening plan files using the Plan File Directory

Using the Plan File Directory page, you can review the list of plan files that you have permission to access in a file group, and open those plan files.

If your system is using the directory page, then your home page or another similar landing page will contain links to the appropriate directory. There is no built-in way to navigate to the directory; you must be provided with a link.

The directory shows the full list of plan files in the file group that you have security permission to access, as well as various columns with information about the plan file. The columns shown are defined at the file group level and cannot be changed in the Web Client.

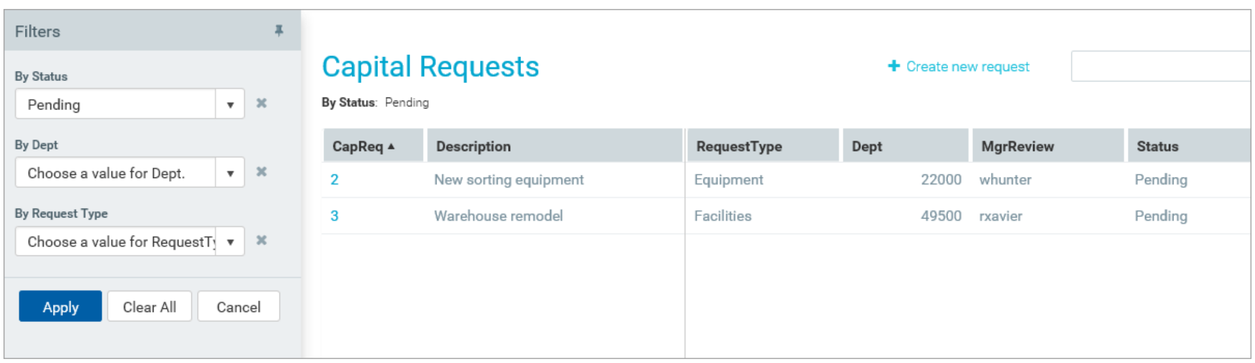


Example Plan File Directory

Searching and filtering the directory

To find the plan files you are looking for, you can use the search box at the top of the page. You can also sort on any column by clicking the column header.

Additionally, if the Plan File Directory page has been set up with refresh variables, you can use these variables to filter the directory. Click the **Filter** icon in the toolbar to open the **Filters** panel and select values for the variables. When you click **Apply**, your selections will be used to filter the report.



Example filters for the directory

For example, imagine that the file group is for capital requests, and the Filters panel contains a refresh variable to select a request type. If you select type 1 and click Apply, the directory will be filtered to show only plan files that are classified as type 1. The current filter is shown at the top of the page, underneath the header.

The ability to filter the directory and the specific filters available are determined at the file group level. If the Filter icon is not present, then no refresh variables have been defined for the file group.

Opening a plan file

To open a plan file, click any column value that displays in blue hyperlink text. The column that contains the hyperlinks is configurable. In the previous example screenshot, the values in the CapReq column are hyperlinks and will open the corresponding plan file.

Viewing and managing attachments

If plan file attachments are enabled for the file group, you can view and manage attachments using the **Attachments** column. This column displays the current number of attachments for each plan file. You can click the link to open the **File Attachments** dialog, where you can upload, view, edit, and delete attachments for the plan file (depending on your level of permission to the plan file). The dialog provides similar functionality to the File Attachments panel for plan files.

The Attachments column is optional, and is only present if the directory has been configured to show it.

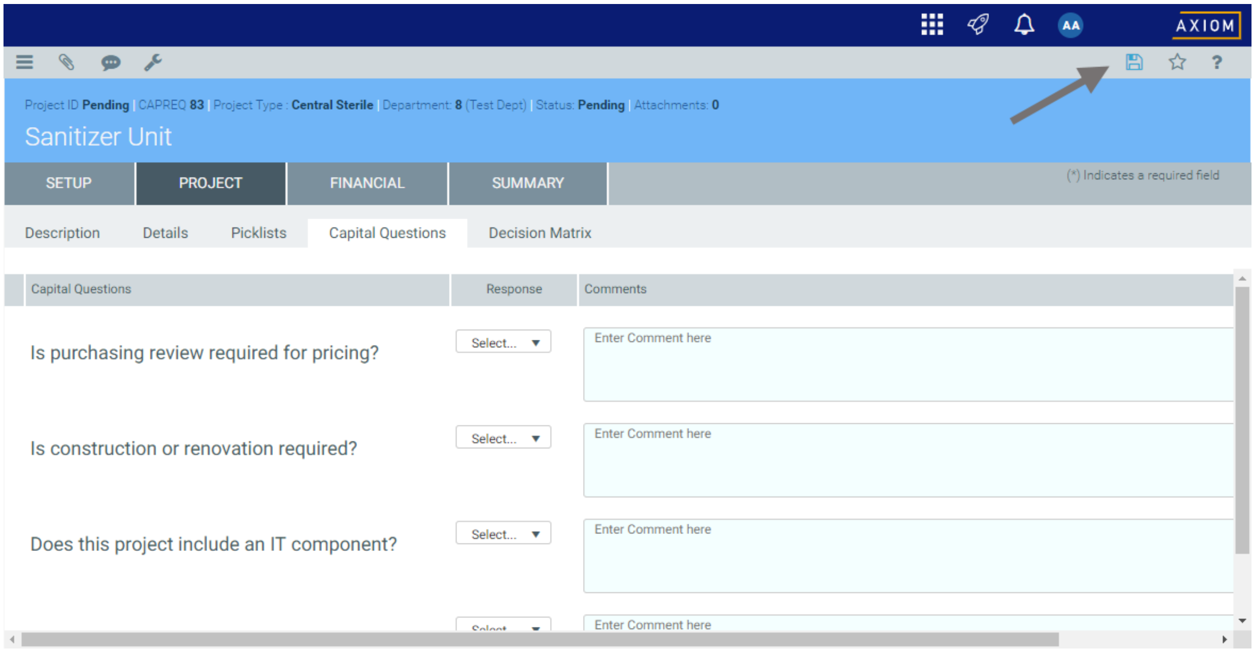
Creating a new plan file

If the current file group is an on-demand file group, then you can create a new plan file by clicking the plus icon at the top of the page. This plus icon displays along with customizable text. In the previous example screenshot, the custom text is **Create new request**.

This feature is only available if the file group has a designated form to allow creating new plan files (an **Add File Form**). Clicking the plus icon opens that form so that you can use it to create a new plan file.

Saving data from an Axiom form

Axiom forms may be designed so that you can save data to the database from the form. By default, if a form is configured to save data, a save icon displays in the right side of the Task Bar.



Example form with save icon in Task Bar

If the save icon is blue, then it is active and can be used to save data. After the save is complete, you may see a confirmation message, or that message may be disabled in the current form.

The icon may be inactive and gray if any of the following are true:

- No data saves are currently enabled in the form. In some cases data saves may be configured so that they are dynamically enabled or disabled depending on selections you make in the form. If a data save becomes enabled later in the session, the save icon will become active.
- You do not have security permission to save data from the form. Contact your system administrator for assistance if you believe you are supposed to be able to save data from the form.
- The form uses save locking, and you do not currently have the save lock. When save locking is used, only one user at a time can "reserve" the ability to save data from the form. For more information, see the following section.

If the save icon is not present in the task bar, this does not necessarily mean that you cannot save data from the form. Older forms, and forms with special requirements, may use a button or a similar component within the form to save data. Usually this component is labeled "Save" (or similar). The component may be located anywhere in the form.

Reserving the ability to save data from an Axiom form (save locking)

By default, Axiom forms are designed to allow concurrent access. Multiple users can access the form at the same time and save data from the form.

However, some Axiom forms may be specially configured so that only one user at a time can "reserve" the ability to save data from the form, for a particular data context. This feature is known as "save locking". If a form uses save locking, then you must own the save lock in order to save data using the form. If you do not own the save lock, then you cannot save data.

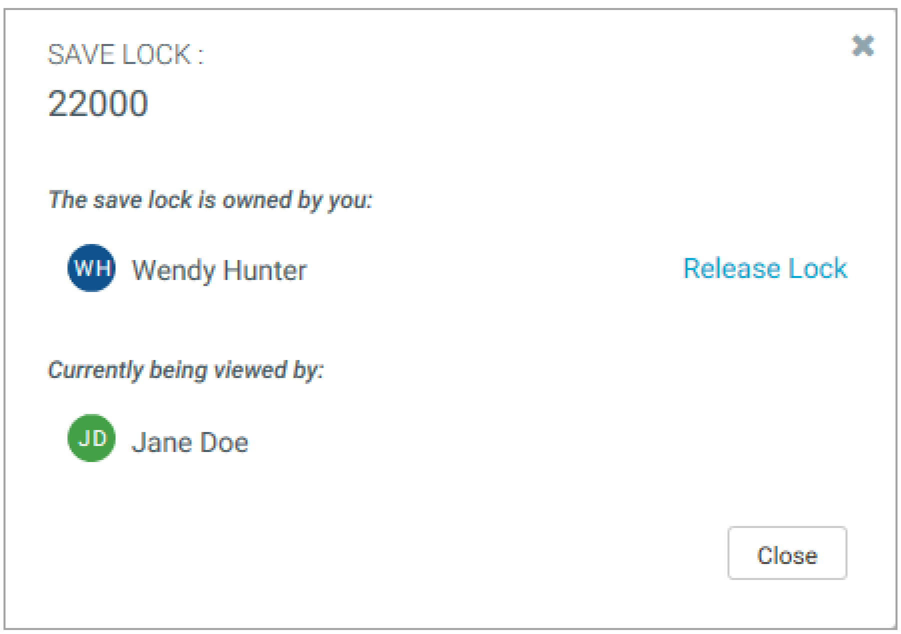
If an Axiom form uses save locking, then by default the save lock status displays in the Task Bar along with the save icon:

 You own the save lock and can save data. Click the save icon to save data, or click the down arrow to open the Save Lock dialog.

 You do not own the save lock and cannot save data. Click the save icon to open the Save Lock dialog.

The Save Lock dialog shows the following information:

- The description of the current data context (shown at the top of the dialog).
- The name of the user who currently owns the save lock.
- The name of any other users who are currently viewing the form and who could potentially acquire the save lock if it becomes available.



Example Save Lock dialog

Older forms, and forms with special requirements, may not use the save icon in the task bar but may still allow saving data using a button or some other component within the form. If the form does not use the save icon, but does use save locking, then the save lock status displays in the task bar using the following informational icons.

 You own the save lock and can save data.

 You do not own the save lock and cannot save data.

In both cases, clicking the status icon opens the Save Lock dialog.

Acquiring the save lock

If a form uses save locking, you must own the lock in order to save data. In most cases, you do not need to do anything in order to acquire the save lock. Axiom Software automatically attempts to acquire the save lock for you in the following cases:

- When you open the file (if save-to-database is enabled).
- When save-to-database becomes initially enabled (if it is not enabled on open).
- When the data context for the form changes (the first time a particular data context becomes active). This may apply in cases where the form is configured to dynamically change the type of data being saved. For example, a form may be configured to save data to a particular department, based on the department selection in the Filters panel. The form can be configured so that each department is a unique data context, so that the save locking feature applies individually to each department.

If you do not own the save lock and you want to acquire it, click the gray save icon to open the Save Lock dialog, then click **Acquire Lock**. The lock can be acquired as follows:

- If no other user currently has the lock, you can acquire it.
- If you are an administrator, you can acquire the lock from another user, but this should only be done when absolutely necessary. The original user will be unable to save data if you acquire the lock.
- If you have the lock in a different browser session, you can acquire it from yourself. You will no longer be able to save data from the other session if you acquire the lock.

Releasing the save lock

If you own the save lock, you can optionally release it so that some other user can save data from the form. You might do this if you are just reviewing the form and do not intend to make any data changes. Click the down arrow next to the save icon to open the Save Lock dialog, and then click **Release Lock**. Once you release the lock, you cannot save data from the form unless you reacquire the lock.

If you do not explicitly release the save lock, then it will remain locked to you as long as you have the form open, unless an administrator breaks the lock or your session times out. You will also release the save lock automatically if you:

- Log out of the Web Client.

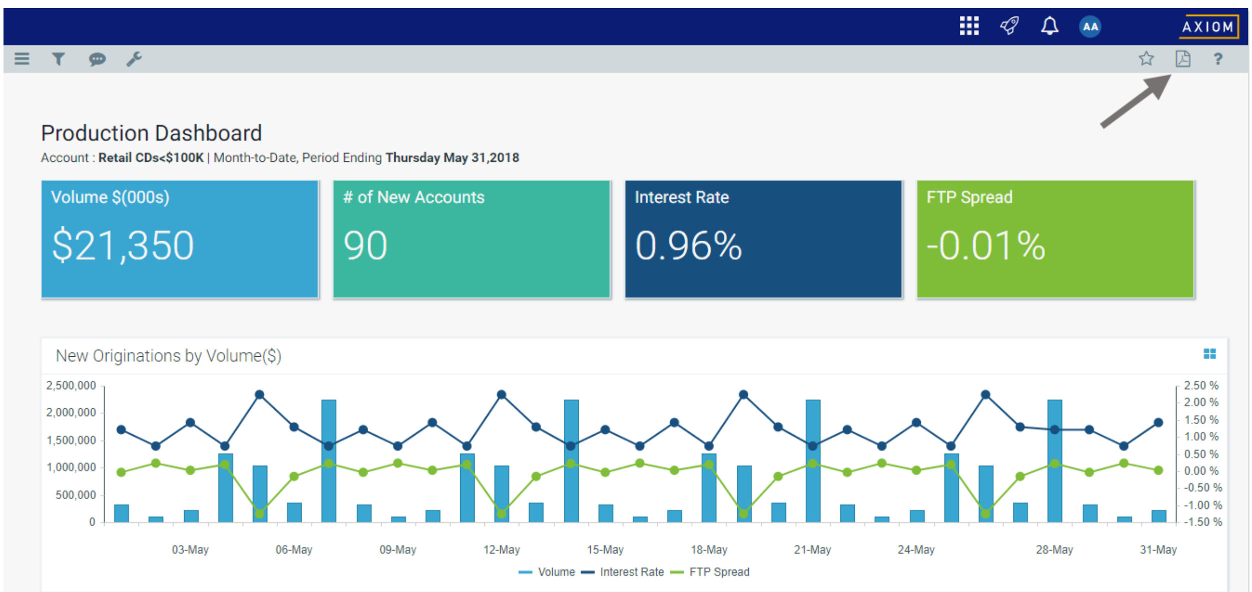
- Complete the currently active process task using a button in the form. If you still have security permission to save data after completing the task, you must manually re-acquire the save lock.
- Navigate to a different form or page (within the same browser tab). There may be a brief delay of 20 seconds or so before the lock is released.
- Close the browser tab. For most browsers, there may be a brief delay of 10 seconds or so before the lock is released. However, if you are using Microsoft Internet Explorer, it takes about 5 minutes before the lock is released.

Printing an Axiom form

There are two ways that you can print an Axiom form. You can use the native print functionality of your browser to print the form, or you can generate a PDF copy of the form and then print the PDF.

Generating a PDF for printing

If an Axiom form has been configured to support generating a PDF, then a PDF icon displays in the right side of the Task Bar. You can click this icon to generate a PDF of the form.



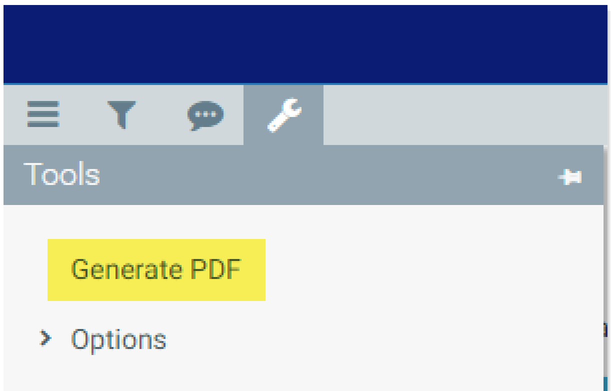
Example Axiom form with PDF icon

Once the PDF has been generated for the form, it opens in your browser. The specific printing procedures and features depend on the browser being used and your PDF reader.

When using the PDF option, the form can be specially configured for printing. For example, certain components may be shown or hidden in the print copy, and formatted grids can be automatically extended to show all rows.

Additionally, some forms may be designed so that you can generate a PDF using a button within the form. This button may be named something like "Create PDF" or it may use the same or similar PDF icon.

If the task bar icon is not available, and the form does not contain a PDF button, then you can use the Tools menu to generate a PDF of the form. Keep in mind that the absence of the other PDF options may mean that the form has not been optimized for PDF generation.



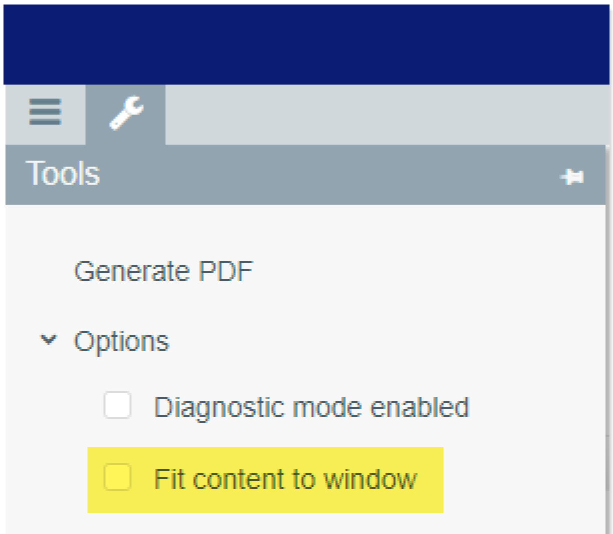
Using browser print functionality

If you print from the browser, then the specific printing procedure and features depend on the browser that you are currently using. However, keep in mind the following tips:

- Use your browser's Print Preview functionality first to see what the printout will look like, and then adjust from there.
- Many Axiom form designs are better suited for printing in Landscape orientation rather than Portrait.

- If the form does not fit nicely within the page, try enabling or disabling **Fit content to window** and then try Print Preview again.

  From the Tools menu in the left side of the Task Bar, click **Options > Fit content to window** to select or clear the check box. This option affects forms differently depending on the form configuration. It will not be useful for all forms.

If the Axiom form is opened as a web tab in the Excel Client or the Windows Client, you must open it within a browser in order to gain access to the browser print functionality. You can right-click the file tab and then click **Open in browser**.

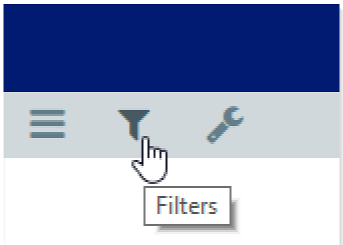
Filtering data in Axiom forms

Axiom forms can be designed to show different data depending on choices you make in the form. Generally speaking, this can be done in two ways:

- The form itself can contain interactive components such as combo boxes, check boxes, text boxes, and radio buttons. The form designer can design the form so that the data changes based on the selections you make with these components. In this case, how the interactivity is presented and how it works is totally up to the form designer.
- The form can be set up to use refresh variables. In this case, you can use the standard Filters panel to enter values for those variables, and then apply the values to refresh the data in the form.

Using the Filters panel to filter data

To open the Filters panel, click the **Filters** icon in the gray task bar across the top of the form.



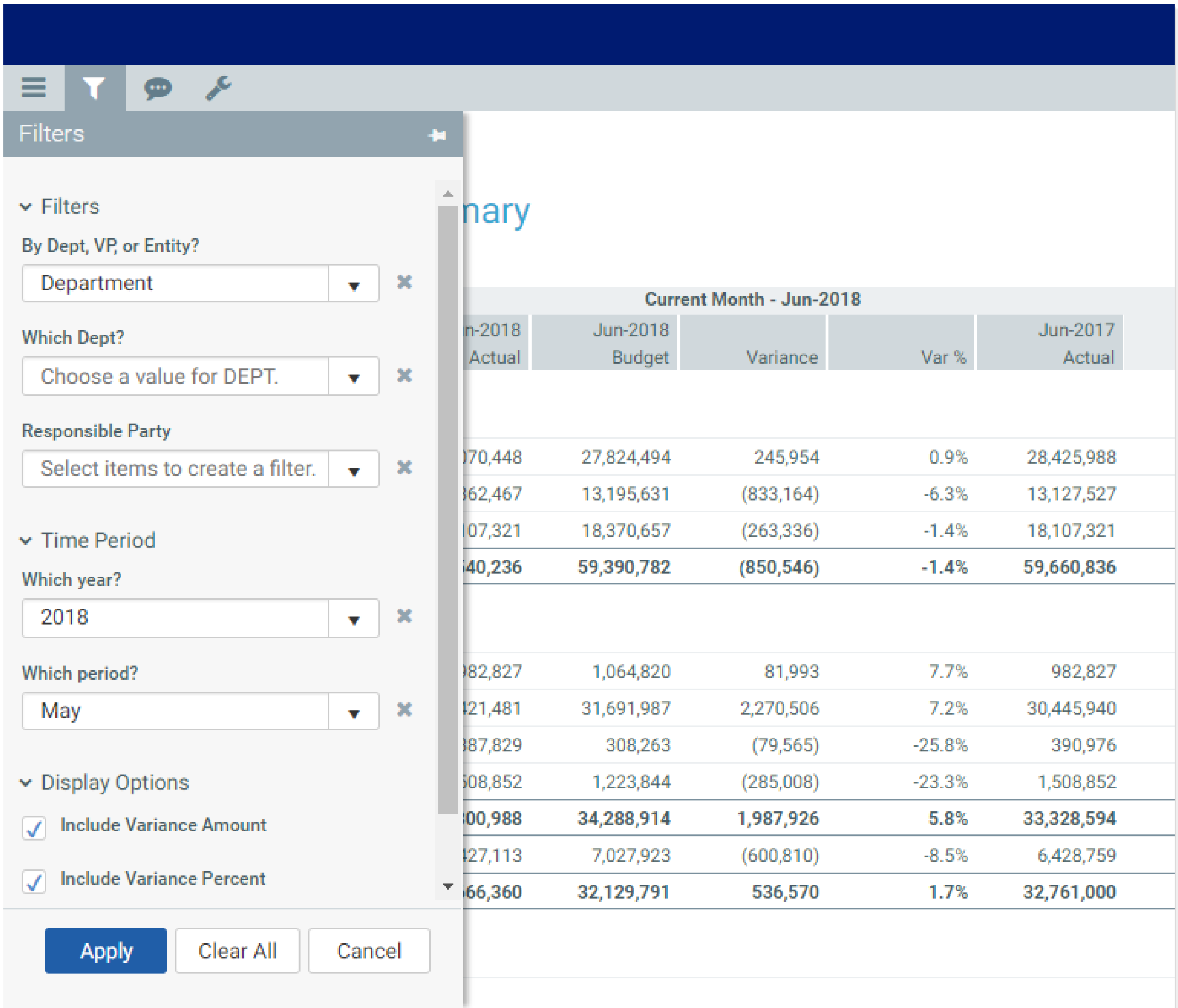
This panel displays the refresh variables for the form:

- To update the data in the form, make selections for each refresh variable and then click **Apply**. The form will be updated to show the latest data based on your selections.

  Variables can be required or optional. If the Apply button is inactive, this means that a selection has not yet been made for a required variable. If a variable is optional, then you can choose to leave it unselected.

- If the variables already have selected values, you can clear all existing values by clicking **Clear All**. You can then start over and select new values for each variable. You can also clear any individual variable by clicking the **X** button to the right of the variable.

- To close the Filters panel without changing the current report parameters, click **Cancel**. The form will not be updated.



Example Filters panel

By default, the Filters panel overlays the form on the left-hand side. When you click the Apply or Cancel button, the panel closes so that you can view all of the form. If desired, you can click the pin icon in the top right-hand corner of the panel to pin the panel open. In this case, the form is pushed to the side so that you can view the refresh variables and all of the form at the same time. When pinned, the panel remains open until you click the pin icon or the filter icon again.

The type and content of the refresh variables are up to the form designer. Ideally, each variable should be named so that its meaning is obvious to you. Note the following:

- Some variables take "free-inputs," meaning that you can type any value into the field. The only restriction is the data type of the value. Some variables can only accept numeric inputs (with or without a decimal), while others can accept text and/or numbers.
- Other variables are restricted to a defined set of valid values. In most cases, these variables are presented as a searchable drop-down list.

NOTE: The gray task bar is only available if it has been enabled for the form. Even if the task bar is available, the Filters icon will only display if the form has defined refresh variables (which is determined by the form designer).

Drilling rows in a grid

Axiom forms may contain grids of data, and these grids can be configured to enable data drilling. When you drill a row in a grid, you can see the data in that row shown at a different level of detail.

For example, the grid may be showing an Income Statement for the consolidated organization. You can drill rows in this report, such as a revenue row, to see the data broken out by region, entity, VP, or some other grouping.

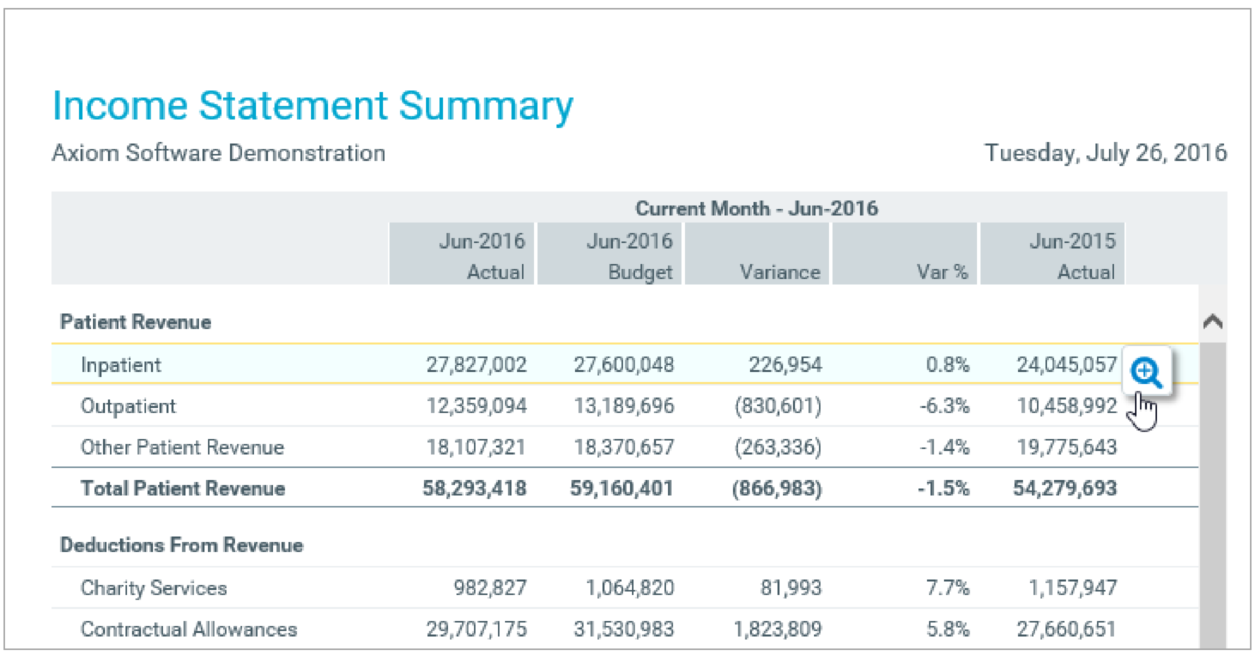
How to tell if you can drill a row

If a grid is enabled for drilling, then you can tell which rows are available for drilling as follows:

- The row becomes highlighted when you hover over it.
- A drill icon (a magnifying glass) displays on the far right of the row when you hover over it.

Both the highlighting and the icon must be present in order to drill. Rows can become highlighted for reasons other than drilling, such as when rows are selectable within a grid.

The following screenshot shows what a drillable row looks like when you hover over it:



Income Statement Summary

Axiom Software Demonstration — Tuesday, July 26, 2016

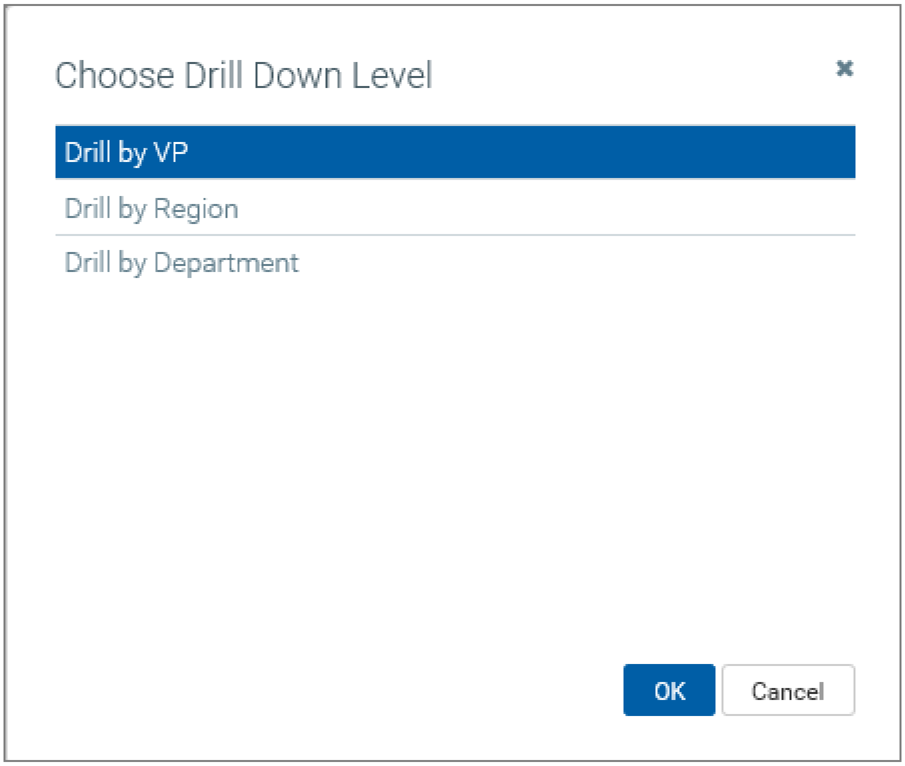
	Current Month - Jun-2016				
	Jun-2016 Actual	Jun-2016 Budget	Variance	Var %	Jun-2015 Actual
Patient Revenue					
Inpatient	27,827,002	27,600,048	226,954	0.8%	24,045,057
Outpatient	12,359,094	13,189,696	(830,601)	-6.3%	10,458,992
Other Patient Revenue	18,107,321	18,370,657	(263,336)	-1.4%	19,775,643
Total Patient Revenue	**58,293,418**	**59,160,401**	**(866,983)**	**-1.5%**	**54,279,693**
Deductions From Revenue					
Charity Services	982,827	1,064,820	81,993	7.7%	1,157,947
Contractual Allowances	29,707,175	31,530,983	1,823,809	5.8%	27,660,651

Drilling a row

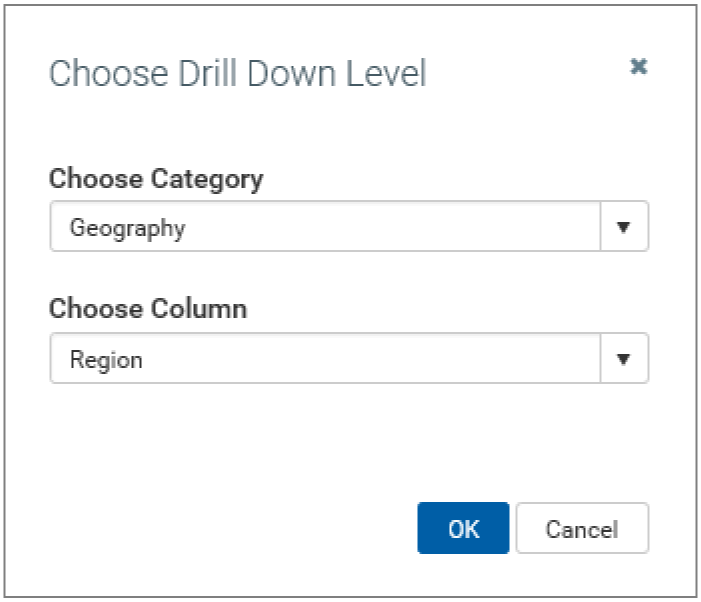
To drill a row, hover over the row and then click the drill icon (the magnifying glass) on the far right end of the row. If you do not see this icon, then the row is not drillable.

After initiating the drill, you must then select the level that you want to drill down to. For example, do you want to see the row's data broken out by regions, VPs, or departments? The available drill levels for the grid are determined by the form designer, so you may see different drilling options when you drill on different grids.

If only one set of drilling options are available, those options will be presented directly in the **Choose Drill Down Level** dialog. For example:



If multiple "sets" of drilling levels are available, then you must first select a drilling category, then select a level in that category. For example:



Once you select a drilling level, the drill results open in a separate tab, in a simple grid. Note the following:

- The dimensionality of the row that you drilled is shown in a subtitle above the grid, as the **Drill Path**. For example, if you drilled a row of revenue data, the Drill Path will be shown as something like **AcctCategory: Revenue**. The exact terminology depends on your system's column names and terms.
- The drill results are grouped by your selected drill level. For example, if you selected regions, then the rows in the grid are by region.
- The drill results may show all of the data columns from the original grid, or only subset of these columns. The columns shown in the drill results are determined by the form designer.\

NOTE: In some browsers, you may have to allow pop-ups for the Axiom Software site in order to open the drill results tab. If the drill results tab does not open, your browser will inform you that it is blocking pop-ups.

You can sort on any column shown in the drill results by clicking on the column header. To filter or group the drill results, click on the **enable grouping and filtering** link in the top right corner of the page. Once enabled, you can:

- Click the filter icon to the right of any column header to filter based on values in that column. Various filtering options are available (depending on column type), such as **Is equal to** or **Does not equal**, **Starts with** or **Ends with**, and **Is greater than** or **Is less than**. Set the desired filter and then click **Filter** to filter the results. To clear the filter, click the filter icon again and then click **Clear**.
- Drag any column header to the top section to show the results grouped by the values in that column. To clear any grouping, click the **X** to the right of the column name.

To hide the grouping and filtering options and clear any applied grouping or filter, click **hide grouping and filtering** in the top right corner of the page.

Custom drilling

In addition to the standard drilling feature described in this topic, Axiom forms can be set up to provide a variety of custom drilling needs. When using custom drilling, the way the drilling works is entirely up to the form designer. Please contact your system administrator if you have any questions about a custom drilling feature within a form.

For example, you might see a "more information" link on each row of a grid. Clicking this link may open a second form that contains more information about the item on the row. The content of this second form could contain a detailed report, or dashboard-style charts and graphs.

Using the Filter Wizard in Axiom forms

Some Axiom forms may be set up so that you can launch the Filter Wizard using a button in the form. Using the Filter Wizard, you can create a filter criteria statement that affects the form in some way, such as to filter the data shown in the form. How the filter is used is entirely up to the form designer.

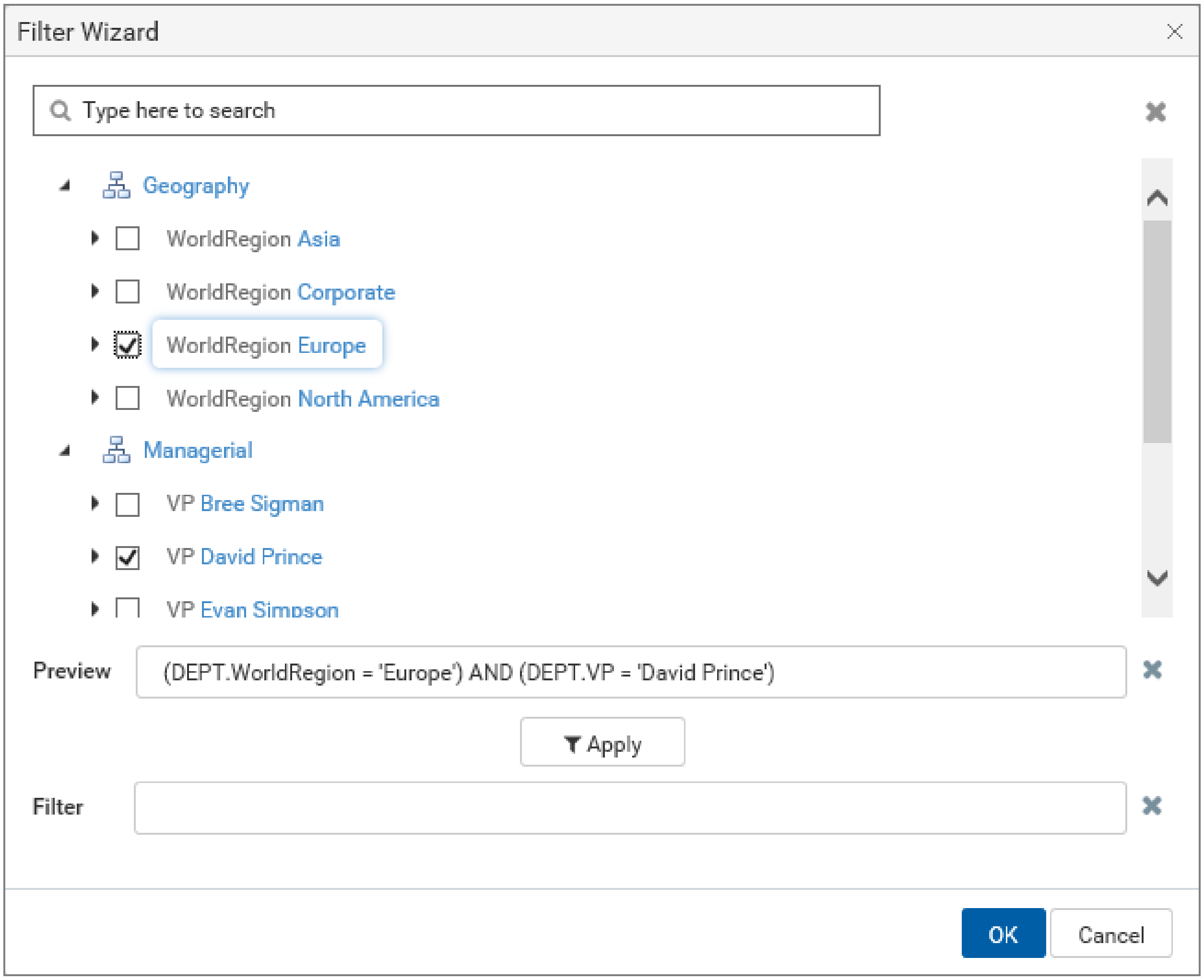
The Filter Wizard offers two different approaches for building filters. When you use the button to open the Filter Wizard, the wizard is automatically set to one of these options, as configured by the form designer:

- **Data Hierarchies**: Build a filter using hierarchies in your system. You select the items that you want to include and the Filter Wizard builds the filter criteria statement for you.
- **Advanced Filter**: Build a filter based on a specific table and column. This approach also allows for more operators, including greater than, less than, and not equal to.

Data hierarchies

To create a filter using data hierarchies, select the check box for each item that you want to include in the filter. You can expand each hierarchy to see the items listed in it. You can also type a value into the filter box above the hierarchies to filter the list.

For example, you may have a hierarchy for Geography that starts at the WorldRegion level, then goes down to the Country level, and then goes down to the LocalRegion level. If you want to filter by a particular country in the Asia WorldRegion, you can expand the Geography hierarchy, then expand the Asia WorldRegion, and then select the desired country.



Example Filter Wizard using hierarchies

As you select items, the filter criteria statement is created in the **Preview** box at the bottom of the dialog. When the filter is as you want it, click **Apply** to move the filter down to the **Filter** box (replacing any current filter). Then, click **OK** to submit the filter to the form.

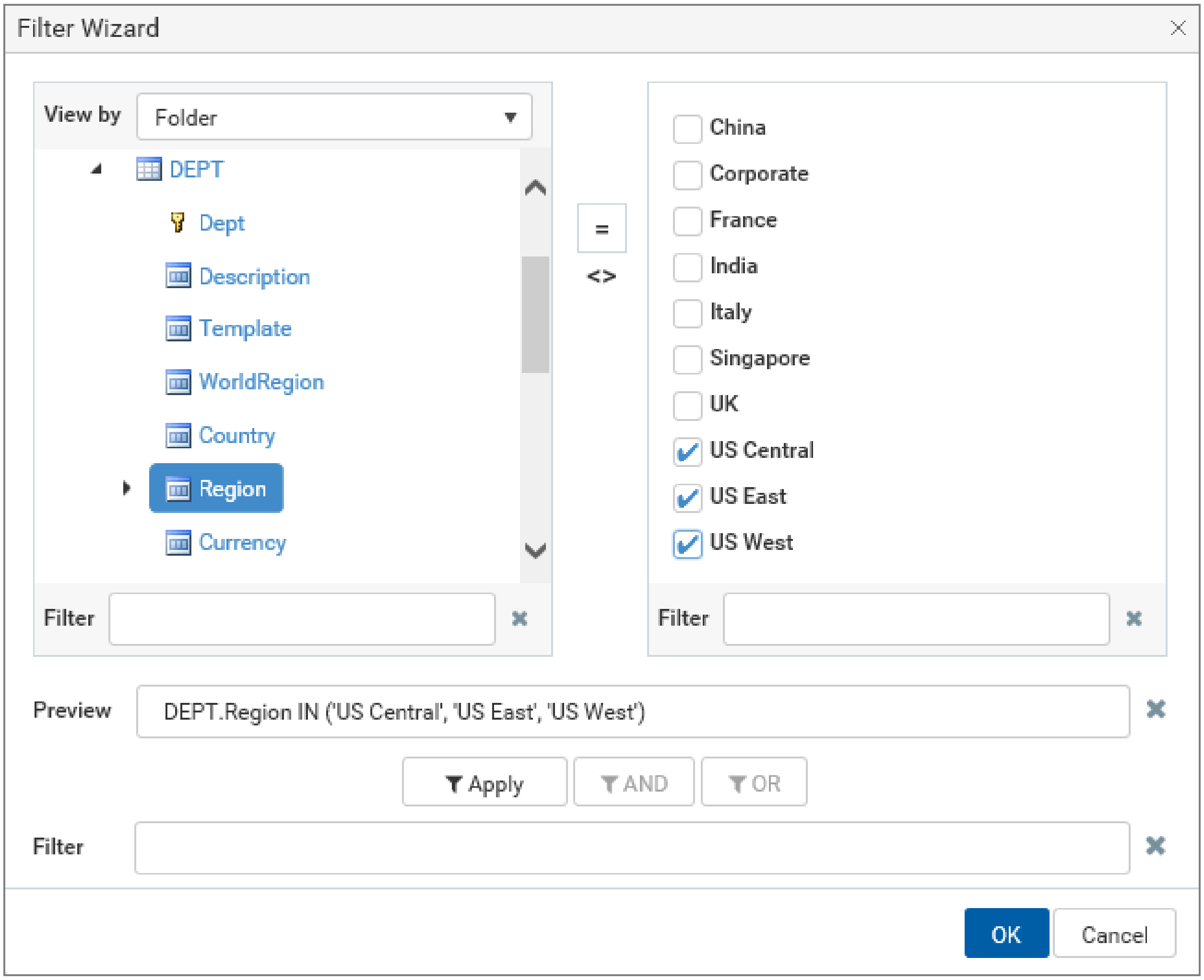
The hierarchies available in the dialog are determined by the form designer and by your table permissions. The form designer may choose to only show certain hierarchies that are relevant to the current form.

Note the following about filters created using data hierarchies:

- Only "include" filter criteria statements can be created using data hierarchy selections. As you select items, those items will be included by using an equals (=) operator or an IN statement (for including multiple items at the same level).
- Certain assumptions are made regarding the use of AND and OR when multiple items are selected from different hierarchy levels or different hierarchies. If you want to change the way each statement is joined, you can manually edit the filter.

Advanced filter

Using the Advanced Filter option, you can create a filter based on specific tables and columns, and using any supported operator.



Example Filter Wizard using advanced view

The tables available in the dialog are determined by the form designer and by your table permissions. The form designer may choose to only show certain tables that are relevant to the current form.

To create a filter using Advanced Filter:

1. In the left-hand side of the dialog, select the table column on which you want to base the filter.

   For example, if you want to create a filter such as `DEPT.DEPT>=5000`, then you must select the DEPT column from the DEPT table.

   To find the desired table and column, you can filter the list by typing into the Search box. The filter matches based on table and column names.

Once you select a table column, the values in that column display in the right-hand side of the dialog.

> **TIP:** Alternatively, you can use the folder icon to the right of the **Preview** box to load a previously saved filter from the Filters Library. If you do this, your selected filter is placed in the Preview box, overwriting any current content in the preview. Skip to step 4.

2. In the right-hand side of the dialog, select the value(s) on which you want to base the filter.

   You can type into the filter box below the list of values to filter the list. Your current typed value is always placed at the top of the list. You can select this typed value regardless of whether it currently matches an actual value in the column. This behavior is to allow you to create a filter for empty tables, or for tables where the value you want to filter on is not yet present in the column. This is why you may see the "no matches" message but still have one value in the list—your typed value.

3. In the space between the two selection boxes, select the operator to use for the filter criteria statement, such as equals, not equals, greater than, or less than. By default, the filter statement uses equals (=).

   Note the following about filter operators:

   - Greater than / less than options are only available if the column data type holds numbers or dates.
   - If multiple items are selected, then IN and NOT IN syntax is automatically used for equals and not equals respectively.
   - If the column is a string column and the value contains an apostrophe (such as O'Connor), the wizard automatically converts this value to double apostrophes so that it is valid for use in the filter (O''Connor). Apostrophes in string values must be escaped this way so that they are not interpreted as the closing apostrophe for the filter criteria statement.
   - The LIKE operator is supported, but is not available for selection in the Filter Wizard. You must manually edit the filter criteria statement if you want to use it. Only advanced users with knowledge of valid SQL LIKE syntax should do this.

4. Review the filter criteria statement in the **Preview** box to ensure that it is as intended. If you need to make changes, you can manually edit the statement, or you can start again with a new statement. If you want to clear the statement, click the **X** icon to the right of the Preview box.

   For more information on valid syntax, see Filter criteria syntax.

5. If no filter is currently present in the **Filter** box, click **Apply** to move the filter down to the Filter box. If a filter is currently present in the Filter box, you can do one of the following:

   - Click **Replace** to overwrite the current filter with the preview filter.
   - Click **AND** or **OR** to add the preview filter to the current filter. This creates a compound criteria statement.

You can repeat the filter creation process as many times as necessary to create the desired statement. You can also manually modify the filter in the Filter box as needed, such as to add parentheses to group statements.

6. When the filter in the Filter box is complete, click **OK**.

> **TIP:** If you want to save the filter you have created for future use, click the save icon to the right of the Filter box. You can select a folder location in the Filters Library (or My Documents if applicable), and specify a name for the filter. This option is only available if you have read/write access to at least one location where filters can be stored.

Your filter is submitted back to the form.

Filter criteria syntax

Several areas of Axiom Software use criteria statements to define a set of data. The syntax for these criteria statement is as follows:

`Table.Column='Value'`

- *Table* is the name of the database table.
- *Column* is the name of the column in the database table.
- *Value* is the value in the column.

If the column is String, Date, or DateTime, the value must be placed in single quotation marks as shown above. If the column is Numeric, Integer (all types), Identity, or Boolean, then the quotation marks are omitted.

For example:

- To filter data by regions, the filter criteria statement might be: `DEPT.Region='North'`. This would limit data to only those departments that are assigned to region North in the Region column.
- To filter data by a single department, the filter criteria statement might be: `DEPT.Dept=100`. This would limit data to only department 100.

If the table portion of the syntax is omitted, then the table is assumed based on the current context. For example, if the filter is used in an Axiom query, then the primary table for the Axiom query is assumed. If the current context supports *column-only syntax*, and the specified column is a validated key column, then the lookup table is assumed.

Operators

The criteria statement operator can be one of the following: =, >,<,<>,<=,>=. Greater than or less than statements can only be used with numeric values. For example:

`ACCT.Acct>1000`

SQL IN and LIKE syntax can also be used. For example:

```
DEPT.Region IN ('North','South')
```

Compound criteria statements

You can use `AND` and `OR` to combine multiple criteria statements. If you are creating long compound criteria statements with multiple ANDs or ORs, you can use parentheses to group statements and eliminate ambiguity. For example:

```
(DEPT.Region='North' OR DEPT.Region='South') AND (ACCT.Acct=100 OR
ACCT.Acct=200)
```

NOTES:

- When filtering on multiple values in the same column, you must use OR to join the statements, not AND. In the example above, if the statement was instead `DEPT.Region='North' AND DEPT.Region='South'`, that statement would return no data because no single department belongs to both the North and South regions. When you use OR, the statement will return departments that belong to either the North or the South regions.
- Alternatively, you can use the SQL IN syntax to create a compound statement for values in the same column. For example, the statement `DEPT.Region='North' OR DEPT.Region='South'` can also be written as `DEPT.Region IN ('North','South')`. The Filter Wizard uses IN syntax by default.

Using criteria statements in functions

If you are using a criteria statement in a function, such as GetData, you must place the entire criteria statement in double quotation marks. For example:

```
=GetData("Bud1","DEPT.Region='North'","GL1")
```

You can also place the criteria statement in a cell and then use a cell reference in the function. In this case, you do not need to use double quotation marks in the function, unless you are concatenating text and cell reference contents within the function.

Referencing blank values in filters

If a string column contains a blank value, you may want to create a filter that includes or excludes records with these blank values. For SQL Server, the blank value is stored as an empty string. This empty string is indicated with empty quotation marks in the filter. For example: `ACCT.CMAssign=''` or `ACCT.CMAssign<>''`

If you use the Filter Wizard to construct the filter, it will automatically use the appropriate syntax.

Referencing values with apostrophes in filters

If a string column contains a value with an apostrophe (such as O'Connor), then that apostrophe must be escaped with another apostrophe so that it is not read as the closing apostrophe for the filter criteria statement. For example:

`Dept.VP='O'Connor'`

Invalid. This construction does not work because Axiom Software reads it as Dept.VP='O' and then does not know what to do with the rest of the text.

`Dept.VP='O''Connor'`

Valid. The extra apostrophe tells Axiom Software that the apostrophe is part of the string value and is not the closing apostrophe.

> **NOTE:** This syntax must use two apostrophe characters in sequence and *not* a double quotation mark. If you create the filter using the Filter Wizard, Axiom Software will construct the appropriate syntax for you.

Referencing Date or DateTime values in filters

If your locale uses a date format where the first value is the day, filters using that date or date-time value will not process correctly. Instead, the date or date-time value must be in standard format. Standard format is `YYYY-MM-DDTHH:MM:SS` for DateTime and `YYYY-MM-DD` for Date.

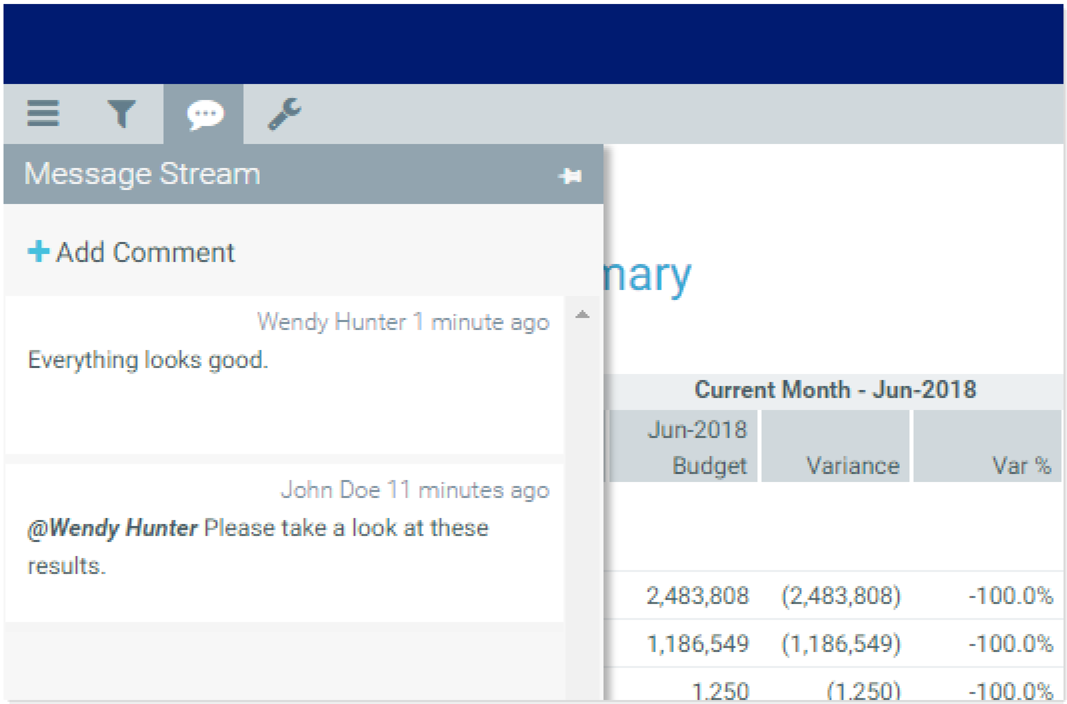
If you use the Filter Wizard to construct the filter, it will automatically convert the date or date-time value to the appropriate syntax.

Commenting on form documents

When viewing an Axiom form, you can view comments that other users have made about the document and also make comments about the document. New comments are stored in the message stream for that document, so that all other users who access the document can see the comment. Additionally, you can "tag" other users in the comment, so that the tagged users are notified about the comment.

Viewing comments

To view the message stream for the current document, click the **Messages** icon (the speech bubble) in the gray task bar across the top of the form. The **Message Stream** panel opens, showing all comments that have been made about the document.



Example message stream

Comments are displayed in the order they were made, with the most recent comment shown at the top of the panel. Each comment shows when the comment was made and the user who made it.

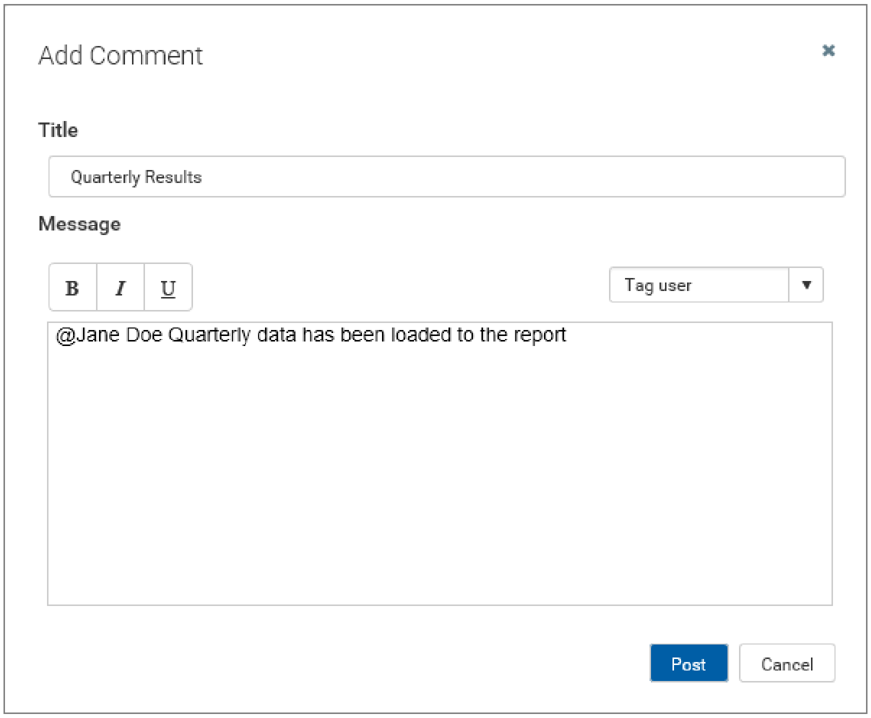
If the comment contains more content than can be displayed within the panel view, then you can click the > symbol to open a dialog with the full comment text.

Comments are stored for the life of the document, and cannot be deleted.

> **NOTE:** The gray task bar is only available if it has been enabled for the form. Even if the task bar is available, the Messages icon will only display if the form has defined refresh variables (which is determined by the form designer).

Adding a comment

To add a comment, click **Add Comment** at the top of the Message Stream panel. In the **Add Comment** dialog, you can define an optional title for the comment, and then define the comment text. Basic text formatting of bold, italic, and underline can be used.



If desired, you can "tag" one or more users in the comment, so that those users are notified about the comment. Any user tagged in the comment will receive an email that contains the content of the comment and a link to the document. To tag a user, use the **Tag user** box to find a user and insert the tag. You can type into the box to find a specific user, or select a user from the drop-down list. When you click on a user name in the list, a tag will be inserted at the current cursor point in the comment text. The tag displays as `@FirstName LastName`.

When you click **Post**, the comment is saved to the message stream, and any tagged users will be notified.

NOTES:

- All users with access to the document can see comments posted to the message stream. Any comments made should be appropriate for the entire document audience. Do not post any sensitive information to the message stream.
- Adding a comment automatically subscribes you to the document's message stream, and tagging a user automatically subscribes that user to the document's message stream.

Ongoing notifications (subscriptions)

If you have made a comment in a document's message stream, or if you have been tagged in a comment, you are now subscribed to that document's message stream. Whenever a new comment is made to that document's message stream, you will receive a notification in the Notifications panel.

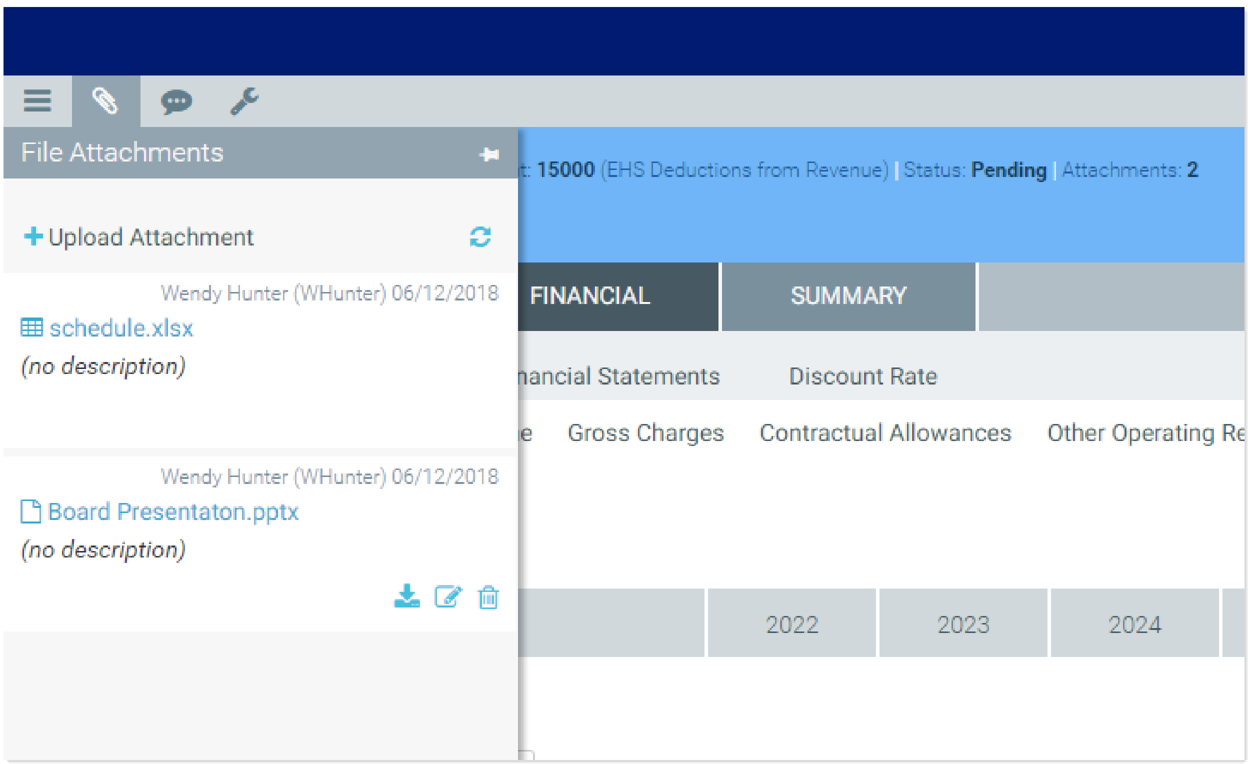
The notification details the user who made the comment and when it was made, the text of the comment, and a link to open the file.

Currently it is not possible to unsubscribe from a document's message stream once you have been subscribed.

Working with file attachments

When viewing a plan file, you can upload file attachments to associate with the plan file, view existing attachments for the plan file, and manage attachments for the plan file.

To view and work with attachments for the current file, click the attachments icon in the Task Bar. The **File Attachments** panel opens, showing all existing attachments. If the plan file does not currently have any attachments, then the panel is empty.



Example plan file attachments

Attachments are listed in the order they were uploaded or modified, with the most recently uploaded or modified file listed at the top. The name of the user who uploaded the attachment is also listed.

NOTE: The gray task bar is only available if it has been enabled for the form. Even if the task bar is available, the File Attachments icon only displays if attachments are enabled for the plan file.

Uploading attachments

You can upload a new file attachment for the current plan file if you have read/write access to the plan file.

To upload a new attachment:

1. Click **Upload Attachment** at the top of the File Attachments panel.
2. In the **Open** dialog, select one or more files to upload. This dialog is the normal file explorer dialog for your operating system.
3. Click **Open** to upload the selected files and attach them to the current plan file.

Once the upload is complete, the new attachments display in the File Attachments panel. These attachments are available to all users with access to the plan file, in any Axiom Software client.

NOTES:

- By default, an individual file attachment cannot exceed 10MB. If you upload multiple file attachments at one time, the total size of all attachments cannot exceed 50MB.
- If you upload a file attachment with the same name as an existing file attachment, the new attachment will overwrite the existing attachment.

Downloading and opening attachments

All users with access to a plan file can download and open existing file attachments for the plan file. To open an attachment, you can do either of the following:

- Click the attachment file name in the File Attachments panel.

  OR

- Click the download icon underneath the attachment name. To access the attachment management icons, hover your cursor over the attachment in the File Attachments panel.

The behavior of the download depends on the browser that you are using and its settings. You may have the option to open the attachment directly, or you may have to save the attachment locally first. Your computer or device must have a program that is capable of opening the attachment's file type.

When an attachment is opened from the Web Client, the attachment does not have any link back to the Axiom Software database. If you modify the contents of the file, the modification is not saved to the database. If you need to modify the contents of the file in the database, you must edit and save the file locally and then re-upload the attachment.

Editing attachments

You can edit the file name of the attachment and/or its description. If an attachment has a description, the description is displayed underneath the file name. You must have read/write access to the plan file in order to edit an attachment.

It is not possible to directly edit the contents of an attachment using the Web Client. If you need to modify the contents of the attachment, you must edit and save the file locally, and then re-upload the attachment.

To edit the name or description of an attachment:

1. Click the edit icon underneath the attachment name. To access the attachment management icons, hover your cursor over the attachment in the File Attachments panel.
2. In the **Edit File Attachment** dialog, edit the **File Name** and **Description** as needed, then click **OK**.

The revised file name and/or description displays in the File Attachments panel.

Deleting attachments

You can delete an attachment if it is no longer needed. You must have read/write access to the plan file in order to delete an attachment.

To delete an attachment, click the delete icon underneath the attachment name. To access the attachment management icons, hover your cursor over the attachment in the File Attachments panel.

Managing announcements

Using the Announcement component in an Axiom form, you can add, edit, and delete announcements.

In order to provide full announcement management capabilities, it is recommended to create an Axiom form that is only intended for use by announcement administrators. This form should contain an Announcement component that is configured as follows:

- Enable **Show All Announcements**, so that announcement administrators can view and edit future and expired announcements. Otherwise, future and expired announcements will not display in the component and cannot be accessed.
- Size the component to a tall height so that announcement administrators can view many announcements without scrolling.

NOTE: The ability to manage announcements is only available to administrators and to users with the **Administer Announcements** security permission. Users without these permissions only see announcements within the component; they do not see any of the editing controls.

Adding announcements

You can add announcements using any Announcement component in an Axiom form. All announcements created using a component are saved to the same central repository and are available to all Announcement components in the system. It does not matter whether the current Announcement component is filtered to only showing certain categories; you can still use the component to create a new announcement for any category.

To add an announcement:

1. Click the plus icon in the top right corner of the Announcements component.
2. In the **Add Announcement** dialog, complete the following announcement properties:

Item	Description
Category	The category for the announcement. All announcements must have a category. Categories can be used to display different announcements to different audiences, by configuring Announcement components to only show announcements for certain categories. By default, the first category in the list is selected. If you want to use a different category, select it from the list. If you need to create or edit a category, click **Manage Categories**. If your organization is not using different categories, then all announcements are assigned to the default **General** category.
Start Date	The date that you want the announcement to start displaying to users. By default, this is today's date. If you do not want the announcement to start displaying until some point in the future, then you can select a future date. The announcement will not display in any Announcement components until that date is reached (unless **Show All Announcements** is enabled for the component).
Expire Date	Optional. The date that you want the announcement to stop displaying to users. You can specify a date so that the announcement is automatically hidden once the expiration date is reached, or you can leave this blank so that the announcement continues to display until it is deleted by an announcement administrator. The expiration date must be after the start date, and cannot be today's date.

Item	Description
Title	The title of the announcement. The title text is what displays to users in the announcement component. The title text may be the entirety of the announcement. For example, you could define a title such as "Reminder: All budgets due today!" with no additional message text. If the title text is too long to display in the Announcement component (this depends on the current width of the component in the form), then an ellipses displays at the end of the visible text. Users can click the **view** link to see the full announcement text.
High Importance	Optional. Select this check box if you want the announcement to display with high importance. In the Announcement component, a red exclamation point displays next to the announcement.
Message	Optional. The message text of the announcement. Use the text box to define the message text. The text can be multiple lines and can use bold, italic, and underlined text. Message text does not display within the Announcements component. If message text is defined, the announcement has a **view** link. Users can click this link to view the full announcement text (title and message).

3. Review all announcement settings to ensure they are as you want them, and then click **Save**.

If the start date is today, the saved announcement is immediately available to all Announcement components, and will be visible in any components that are configured to display the announcement's assigned category. If a user is currently viewing a form with an Announcement component, the new announcement will not display until the form is updated by using a Button component or any other component configured to auto-submit.

▶ Editing announcements

You can edit any announcement that is currently displayed in an Announcement component in an Axiom form. It is recommended to use an Announcement component that is configured with **Show All Announcements** enabled, so that you have access to all available announcements.

If the Announcement component that you are using for editing does not have Show All Announcements enabled, then you will not be able to edit the following announcements because they do not display in the component:

- Announcements with start dates in the future
- Announcements that have reached their expiration dates
- Announcements that have been filtered from display by using the **Limit Categories To** option.

To edit an announcement:

1. Hover your cursor over the row of the announcement that you want to edit, so that the editing icons display on the right side of the row. Click the pencil icon to edit the announcement.
2. In the **Edit Announcement** dialog, edit the announcement settings as desired. See the previous section for more information on the announcement settings. Note the following:
   - Changing the announcement category may cause the announcement to no longer display in certain components, and to start displaying in other components, depending on which categories those components are configured to show.
   - Changing the start date to the future will cause the announcement to stop displaying in any components (except components with **Show All Announcements** enabled).
   - It is not possible to change the expiration date to today to hide the announcement immediately. You must delete the announcement if you want it to stop displaying today.
3. Review all announcement settings to ensure they are as you want them, and then click **Save**.

Changes to announcements take effect immediately. If a user is currently viewing a form with an Announcement component, the changes will not display until the form is updated by using a Button component or any other component configured to auto-submit.

Deleting announcements

You can delete any announcement that is currently displayed in an Announcement component in an Axiom form. It is recommended to use an Announcement component that is configured with **Show All Announcements** enabled, so that you have access to all available announcements.

If the Announcement component that you are using for deletion does not have Show All Announcements enabled, then you will not be able to delete the following announcements because they do not display in the component:

- Announcements with start dates in the future
- Announcements that have reached their expiration dates
- Announcements that have been filtered from display by using the **Limit Categories To** option.

If you delete an announcement, it is not recoverable. Be sure that you no longer need the announcement before you delete it.

NOTE: When an announcement expires, it is not deleted from the Axiom Software database. Expiration simply means the announcement no longer displays in the component (except for components with Show All Announcements enabled). In order to remove the announcement from the database, you must delete it.

To delete an announcement:

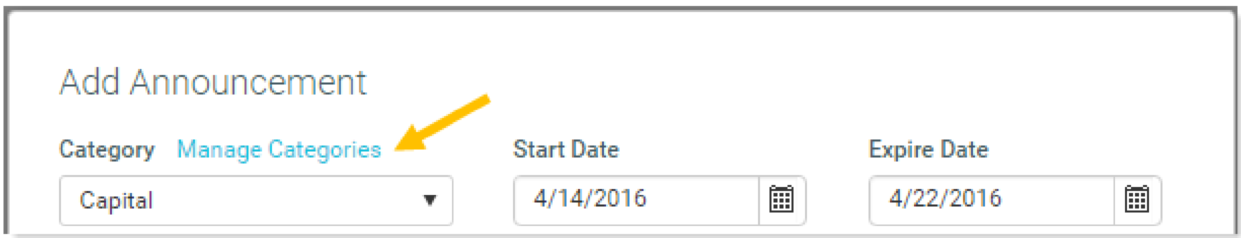
- Hover your cursor over the row of the announcement that you want to delete, so that the editing icons display on the right side of the row. Click the trashcan icon to delete the announcement.

The announcement is deleted immediately. If a user is currently viewing a form with an Announcement component, the announcement will not be removed until the form is updated by using a Button component or any other component configured to auto-submit.

Managing announcement categories

All announcements must belong to a category. If you are not using multiple categories, then all announcements are assigned to the default category of General. If you want to use other categories, you must create them.

Categories can be created, edited, and deleted from the **Add Announcement** or **Edit Announcement** dialog. Click the **Manage Categories** link above the **Category** drop-down list.



In the **Manage Categories** dialog, all existing categories display in a grid at the top of the dialog. Within this dialog, you can do the following:

- To add a new category, click **Add a New Category**. Define a **Name** and **Display Text** for the category, then click **Save**. The new category is added to the grid. The category name must be unique.
- To edit a category, click the category name in the grid, so that the name and display text display below. Edit the display text as needed and then click **Save**. The category name cannot be changed.
- To delete a category, hover your cursor over the category row until the editing icons display in the right side of the row. Click the trash can icon to delete the category.

  You cannot delete a category if active announcements are assigned to that category—you must delete these announcements or assign them to another category first.

The name of the category is used to identify the category, whereas the display text displays to users. You could define a category name of Cap and then display text of Capital. You can later edit the display text as needed, such as to Capital Planning, without changing the underlying ID of the category.

NOTE: When configuring an Announcement component to filter by category, the list of categories is loaded when the file is opened. If you add or remove a category, you must close and reopen the file in order to see the changes.

4

Using plan file processes in the Web Client

Plan files in a file group can be part of a defined planning process, which is a set of steps for plan files to progress through during a planning cycle. For example, you may have a basic process with two stages: one for managers to develop the plans, and one for the Finance department to review and approve them. Or you may have a multi-step plan which includes several passes of plan development, and multiple levels of review.

For each defined step of the process, each plan file has a designated owner. When the plan file is in a step, that owner has a plan file "task" to perform one of the following actions:

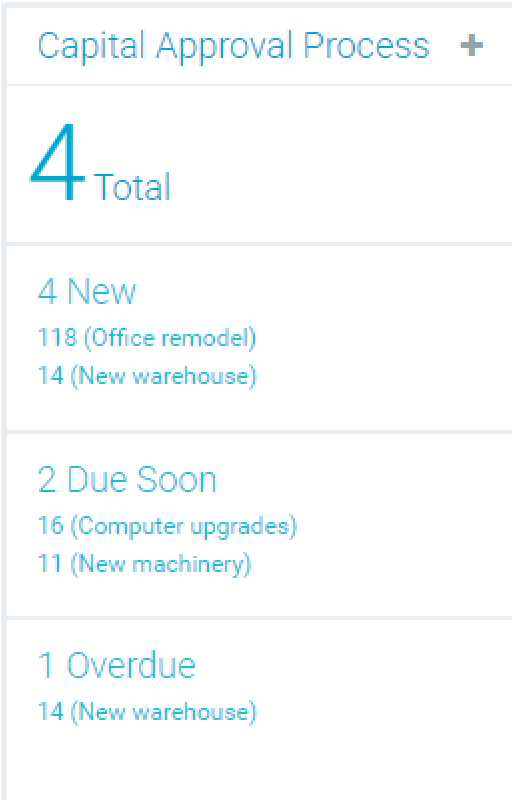
- Edit the plan file and then submit it to the next step.

  OR

- Review the plan file and then approve it or reject it.

If you are assigned a plan file process task, it is your responsibility to complete the task by the specified due date. Using the Web Client, you can view and complete your current process tasks, and you can view the progression of your plan files in the process.

In most cases, your home page (or a similar landing page) will contain information on your current process tasks, for a particular process. This process summary is customizable, but looks similar to the following:



There are three ways that you can complete your current process tasks:

- Depending on how your plan files are designed, you may be able to complete the current task for a plan file by using a button within that plan file.
- You can go the Process Tasks page, which displays all of your current process tasks for a particular process. Clicking the number links in the process summary will take you to this page.
- You can go to the Process Routing page for a particular plan file, which displays information about the plan file's progression through the process. The current task owner can also complete the task from this page. Clicking the plan file links in the process summary will take you to this page.

Viewing process status for all plan files

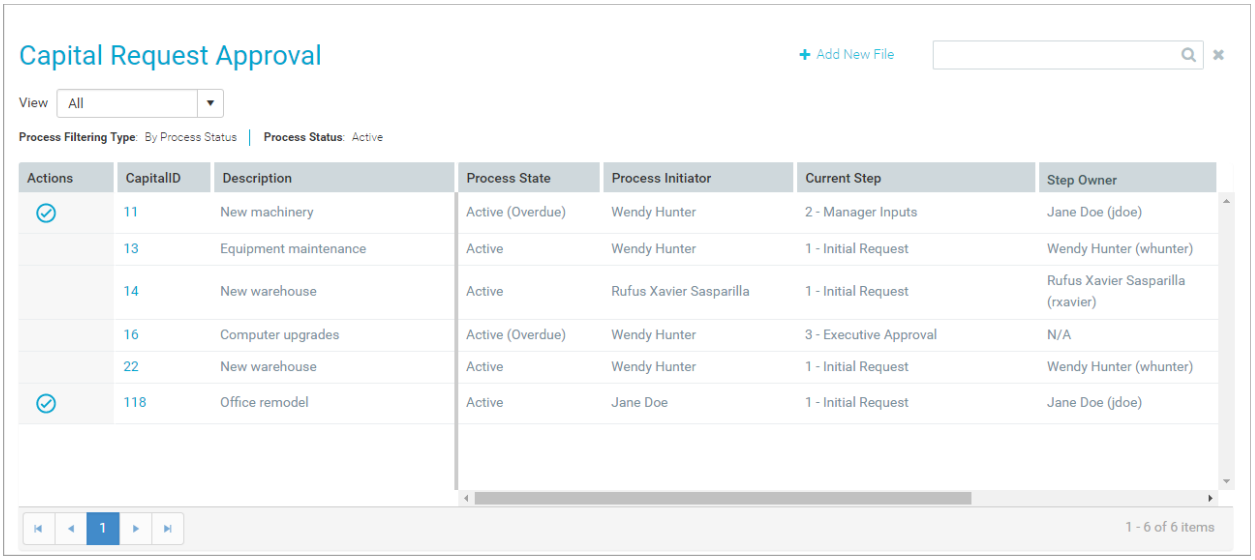
Using the Process Directory page, you can view the current process status for all plan files that you have access to within a particular file group. If you are the current step owner of one or more plan files, you can also complete the process tasks from this page.

You can access this page as follows:

- By clicking on the total task numbers in the Process Summary component. The Process Summary component may be included on your home page (or a similar landing page). It displays information such as your total current tasks and your total new tasks.

- Your system may have been designed to include links to this page within other forms that you have access to, such as your home page.

The directory shows the full list of plan files that you have security permission to access in the file group, as well as various columns with information about the process status for each plan file. The columns shown are defined at the file group level and cannot be changed in the Web Client.



Example Process Directory page

To search for a particular plan file, you can use the use the search box at the top of the page. You can also sort on most columns by clicking the column header. Some process columns, such as owner and due date, do not support sorting.

The directory has three different views that you can choose from the top of the page.

- **All**: Shows all plan files that you have access to in the file group. This is the default page view if you navigate directly to the page.
- **My Current Tasks**: Shows just the plan files where you are the current process task owner. This is the default page view if you navigate to the page from the Process Summary component.
- **My Requests**: Shows just the plan files where you are the process initiator. Typically, the process initiator is the user who created the plan file. This view is only available for plan file processes in on-demand file groups.

From this page, you can also do the following:

- **Open the Process Routing page for a plan file:** To open the routing page for an individual plan file, click any column value that displays in blue hyperlink text. The column that contains the hyperlinks is configurable. In the previous example screenshot, the values in the CapitalID column are hyperlinks and will open the corresponding routing page.

The Process Routing page contains full process details about each plan file, including comments made by step owners when completing tasks.

- **Create a new plan file**: If the current file group is an on-demand file group, you can create a new plan file by clicking the plus icon at the top of the page. This plus icon displays along with customizable text. In the previous example screenshot, the custom text is **Add new file**.

  This feature is only available if the file group has a designated form to allow creating new plan files (an **Add File Form**). Clicking the plus icon opens that form so that you can use it to create a new plan file.

Completing tasks

Using the icons in the Actions column on the left-hand side of the directory, you can complete the current process task for the plan file. The action icons are only available if you are the current step owner for the plan file, or if you are an administrator, process owner, or process group owner.

To complete a task, click the appropriate icon next to the plan file name:

- Click the check mark icon to submit or approve the plan file (depending on the step type). This will move the plan file to the next step.
- Click the X icon to reject the plan file. This will return the plan file to the prior step. The reject action is only available for approval steps.

Filtering the directory

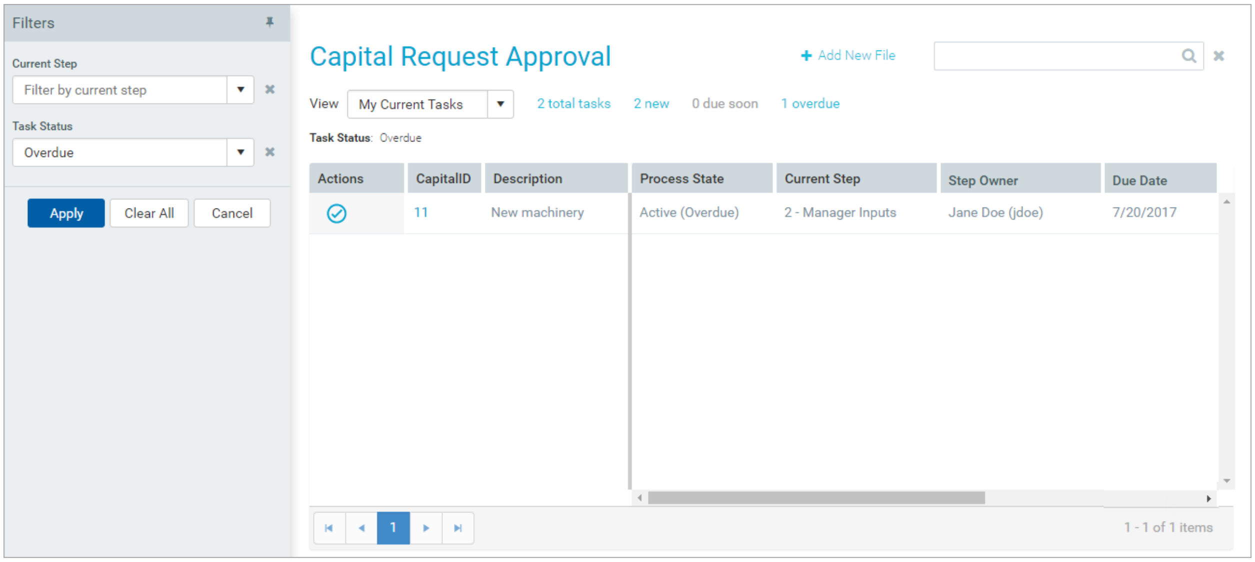
You can filter the directory to only show plan files that meet certain criteria. Click the **Filter** icon in the toolbar to open the **Filters** panel and select values for the filters. When you click **Apply**, your selections will be used to filter the directory. The currently applied filter displays below the View box for reference.

Filters for My Current Tasks

When the view is My Current Tasks, the directory can be filtered using the following options:

- **Current Step**: Show your current tasks for a particular step. By default the view shows tasks for all steps.
- **Task Status**: Show your current tasks based on task status, such as whether the task is new, due soon, or overdue. By default the view shows tasks in all statuses. However, if you navigate to the page from the Process Summary component, the view is automatically filtered based on the header you clicked to get here. For example, if you clicked on "3 due soon," then the view is filtered to show only the due soon tasks.

The task status filters are available in the Filters task pane and also using links along the top of the page. You can click any of these links to quickly filter the list based on task status.

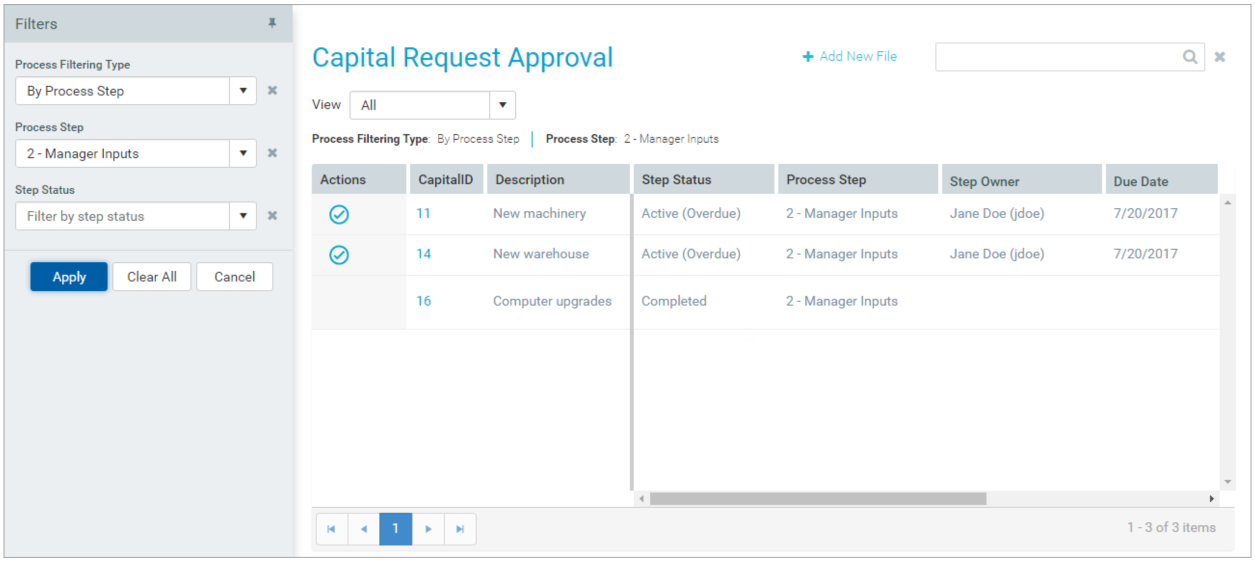


Example My Current Tasks view with filters

Filters for other views

When the view is All or My Requests, the directory can be filtered by various process status properties or step properties. The filters vary based on the **Process Filtering Type**:

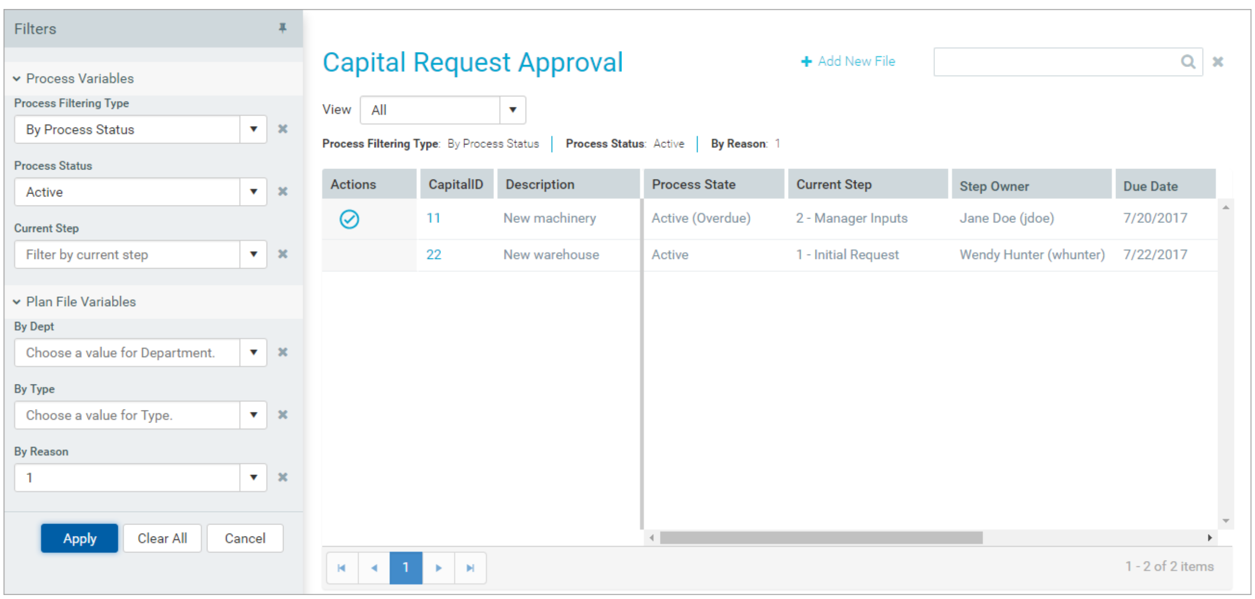
- **By Process Status** (default): The view allows filtering based on each plan file's overall process status and current step.
- **By Process Step**: The view allows filtering based on each plan file's status for a particular step. By default, if no step status filter is applied, then the view shows all plan files that have ever been active in the selected step. Plan files that have not yet been started or that skipped the step do not show.
- **By Current Owner**: The view allows filtering based on each plan file's current owner. The view can be further filtered by task status and specific step.



Example All view with step status filters

Custom filters

Your organization may have defined additional custom filters to allow filtering the directory by plan file attributes. If present, these filters display underneath the built-in process filters.



Example custom filter options at bottom of Filters panel

Process grouping

If the plan file process uses a grouping column, then you can also filter the list by groupings. For example, the process may use Entity as a grouping column. If you have access to plan files in Entity 1 and Entity 2, then you can filter the list by those groupings.

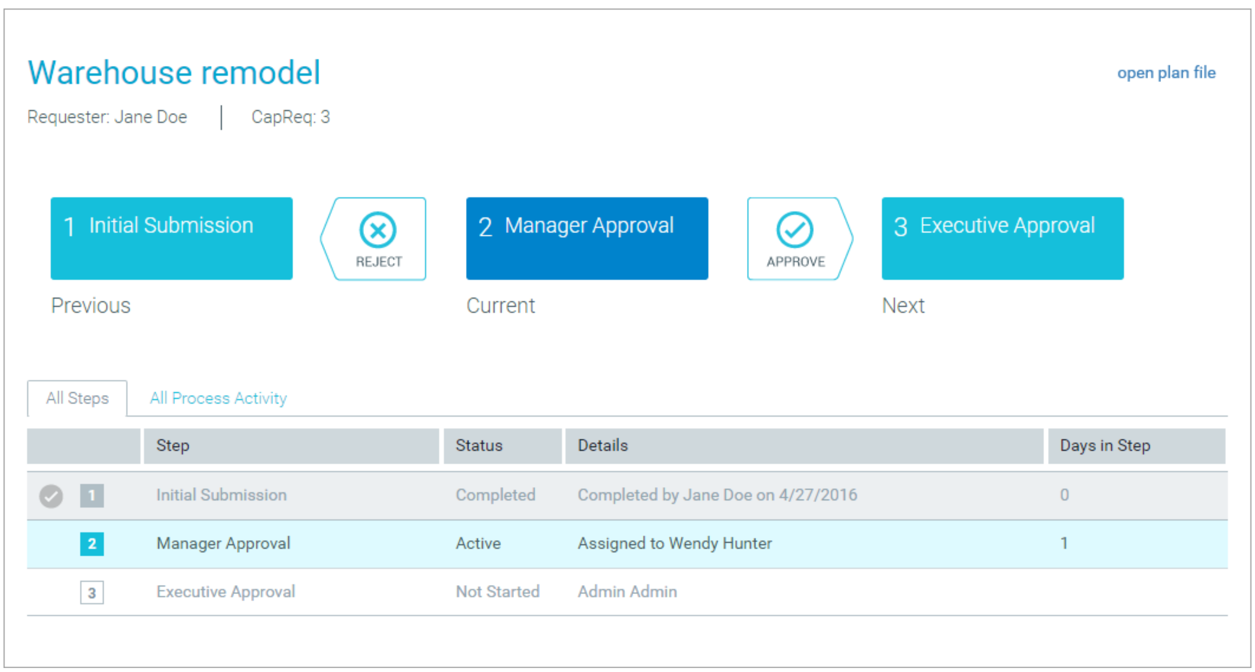
Viewing process routing details for a plan file

Using the Process Routing page, you can view the current process status and details for a particular plan file and open that plan file. If you are the current step owner, you can also complete the task from this page.

You can access the Process Routing page as follows:

- By clicking on a plan file name in the Process Summary component. The Process Summary component may be included on your home page (or a similar landing page). It displays information such as your total current tasks and your total new tasks.
- By clicking on a plan file name in the Process Tasks page.
- By clicking on a hyperlink in the Process Directory page. This page is configurable. The hyperlinks may be present on any column in this page.
- Additionally, your system may have been designed to include links to this page within other forms that you have access to.

NOTE: This page is only available to users if the process has been configured to show it, using the option **Make routing page visible to anyone with read access to the plan file** in the process definition. If the built-in links to this page are not available, or if a permissions error occurs when you try to access the page directly via a URL, then this option has been disabled for the process.



Example Process Routing page

Any user who can access the plan file can access this page, but only the current step owner can complete the task. If you are not the current step owner, then the action button(s) at the top are grayed out.

In this page, you can see the following information:

- The top of the page displays the current step of the plan file, as well as the next step in the progression. If the current step is an approval step, then the prior step is also shown because the plan file may be rejected back to it.
- The **All Steps** tab shows the plan file's status in the full step progression. You can see which steps have been completed or skipped, the current step, and future steps.
- The **All Process Activity** tab shows the complete process details for the plan file, including activities such as step activation and completion, task regeneration, and comments made when completing tasks.

To open the plan file from this page, click the **open plan file** link in the top right-hand corner of the page. The name of this link can be customized.

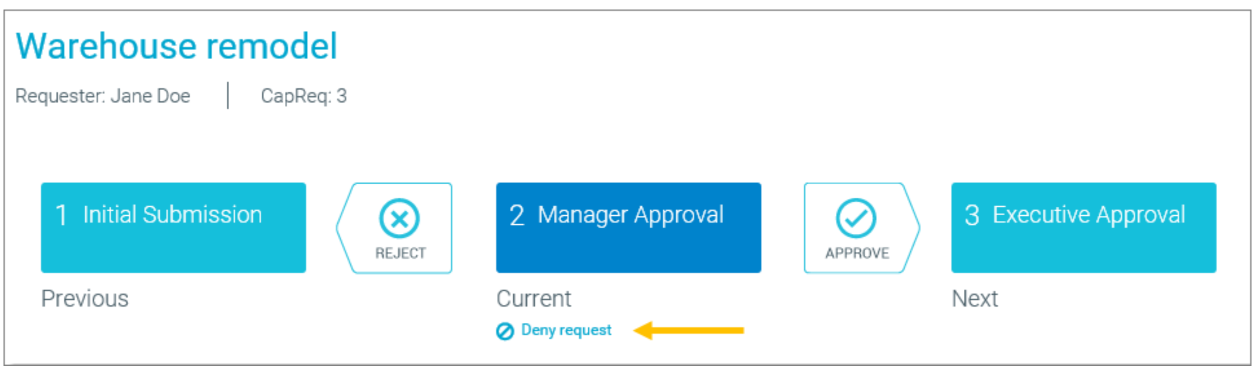
Completing the process task

If you are the current step owner, then you can complete the process task for the plan file by clicking the appropriate action buttons at the top of the page:

- If the current step is an Edit Plan File step, then click **Submit** to submit the plan file to the next step.
- If the current step is an Approval step, then click **Approve** to approve the plan file and move it to the next step, or click **Reject** to reject the plan file and return it to the prior step.

Clicking any of these actions opens the task completion dialog. In this dialog, you can optionally enter a comment to be stored in the process history and sent to the next step owner.

Some approval steps may also provide the option to abort the process for the plan file, meaning that the plan file is stopped in the process and does not progress any further. By default, this action is called **Deny request**, but the text may be customized. If available, this option is presented underneath the current step, as shown in the following example:



Example deny option for approval steps

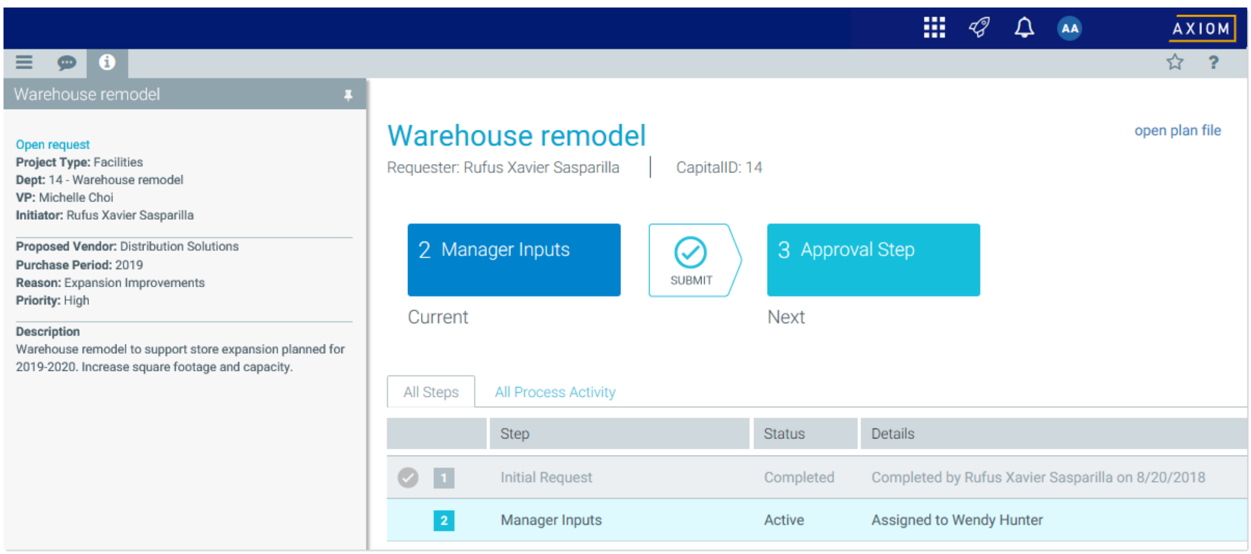
If you choose to deny the request and abort the plan file in the process, the plan file is effectively removed from the process. You will be given the opportunity to enter an optional comment to explain the denial.

NOTE: The denial action cannot be reversed. Once a plan file has been aborted in the process, only a process administrator can restart it if necessary.

Viewing plan file information

If the process is configured to show plan file information on the Process Routing page, then the Information panel is automatically opened and pinned when you access the page. This panel shows details about the plan file, which may be useful in determining whether you are ready to complete the process task. The panel may also include a link to open the plan file.

You can toggle this panel open and closed by clicking the **Information** icon.



Example information panel

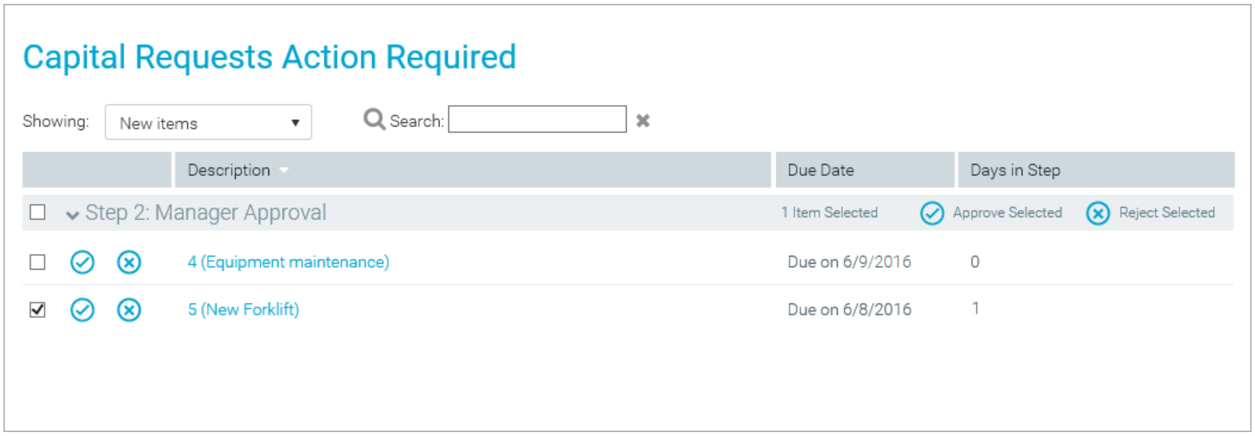
The message stream for the plan file is also available from this page, so that you can view and add comments about the plan file. Click the **Message** icon to open the Message Stream panel. For more information on the message stream, see Commenting on form documents.

Completing process tasks using the Process Tasks page

Using the Process Tasks page, you can review all of your current process tasks for a particular process, and complete those tasks. You can complete tasks individually or in batch.

If your system is using the Process Tasks page, then your home page or another similar landing page will contain links to the page. There is no built-in way to navigate to the page; you must be provided with a link.

The following screenshot shows an example Process Tasks page:



Tasks are displayed in groups by step. You can expand and collapse each group by clicking the step header. You can also:

- Change the page view to only show certain tasks, by using the **Showing** drop-down list. By default, the page shows **All** tasks, but you can change this view to show only **New items**, **Due soon**, or **Overdue items**.
- Use the **Search** box to find a particular task or tasks. You can find tasks based on the plan code or description.
- Click any column header to sort the list of tasks by that column.

Up to 10 tasks per step are displayed on the page by default. If you have more than 10 tasks in a step, the number of total tasks displays at the bottom of the step list, such as "Showing 10 of 37 items." If necessary, you can click **show all** next to this text, to bring in all tasks for the step (as filtered by the current view).

Completing tasks

To complete a single task, click the appropriate icon next to the plan file name:

- Click the check mark icon to submit or approve the plan file (depending on the step type). This will move the plan file to the next step.
- Click the X icon to reject the plan file. This will return the plan file to the prior step. The reject action is only available for approval steps.

To complete multiple tasks, select the check boxes for the tasks that you want to complete. You can click the check box in the step header to select all tasks in that step (as filtered by the current view). The action to complete the tasks depends on the type of step:

- For Edit Plan File steps, click **Submit Selected** in the step header to move the plan files to the next step.
- For Approval steps, click **Approve Selected** in the step header to approve the plan files and move them to the next step. Or, click **Reject Selected** to reject the plan files and send them back to the prior step.

Reporting on time in step for a plan file process

Using the Time-in-Step page of the Web Client, process administrators can report on the average time plan files spent in each step. This report can assist in identifying bottlenecks in the process. Only administrators and process owners can access this report.

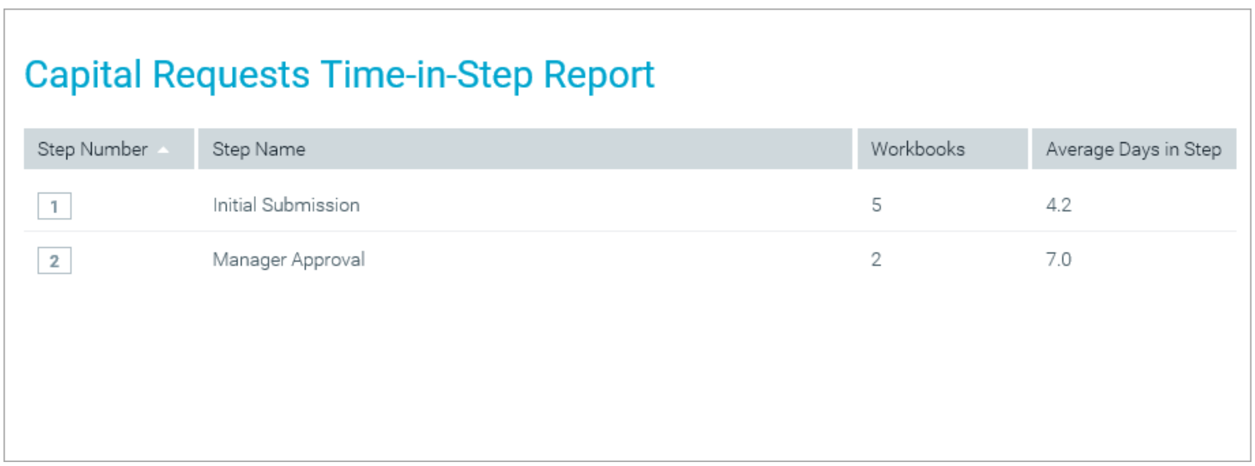
To access this page, use the following URL:

`<`*`baseURLtoAxiom`*`>/process/`*`processID`*`/metrics`

For example, if the process ID is 5988, the URL would look as follows:

`https://`*`ClientName`*`.axiom.cloud/process/5988/metrics`

In most cases, the URL will be already generated for you and included on your home page or other landing page for process administrators, so that you can simply click a link to be taken to the page. There is no way to look up the process ID for a particular process from the Web Client; this must be done in the Desktop Client using either Axiom Explorer or the GetProcessID function.



Capital Requests Time-in-Step Report

Step Number	Step Name	Workbooks	Average Days in Step
1	Initial Submission	5	4.2
2	Manager Approval	2	7.0

Example Time-in-Step Report

By default, this page shows the average total time plan files spent in each step. The calculation includes any plan file that has spent any time in the step, including plan files still active in the step, plan files that have completed the step, and plan files that were active in the step but were aborted out of the step (such as due to moving the plan file to a different step).

If a step is reopened for a particular plan file (such as due to a plan file being rejected back to the step), the time in step is not restarted for that plan file. Instead, the original time in step and the reopened time in step are added together to arrive at the total time in step.

▶ Filtering the Time-in-Step report

If the time-in-step report for this process has been set up with refresh variables, you can use these variables to filter the results. Click the **Filter** icon in the toolbar to open the **Filters** panel and select values for the variables. When you click **Apply**, your selections will be used to filter the report.

For example, imagine that the process is for capital requests, and the Filters panel contains a refresh variable to select a request type. If you select Type 1 and click Apply, the report will be filtered to show the total average time in step for plan files that are classified as Type 1. The current filter will be shown at the top of the report, underneath the header.

The ability to filter the report and the specific filters available are determined at the process definition level. If the Filter icon is not present, then no refresh variables have been defined for the current process. Only the total average time-in-step can be shown.

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