Release Notes

Axiom Software
Version 2020.1

KaufmanHall
AXIOM

Contents

About the release notes

Kaufman Hall is pleased to announce the release of **Axiom Software Version 2020.1**. Each release of Axiom Software provides a variety of new features and enhancements to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

The purpose of these release notes is to provide you with the following:

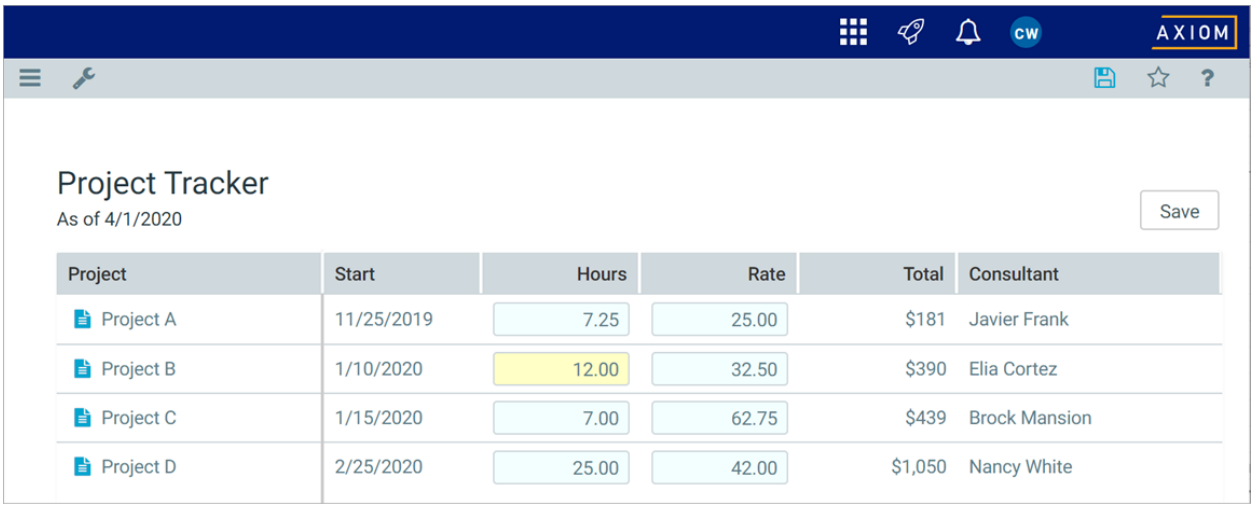
- High-level summary of new features and enhancements
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

Overview of new features and enhancements

This section provides an executive summary of the features and enhancements in this release. For more information, please see the separate *What's New* document for 2020.1, or see the *What's New* section in Axiom Help.

Save data from a data grid

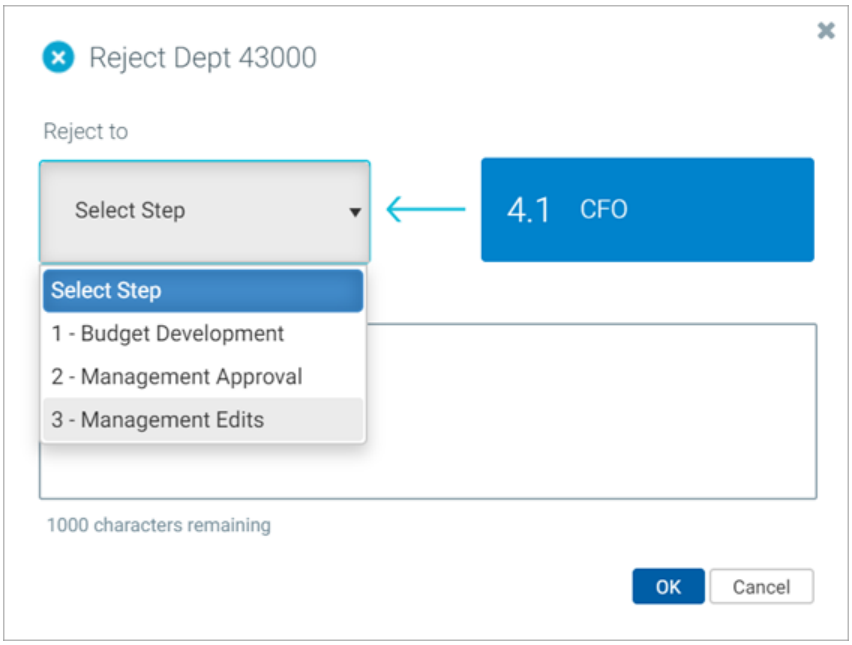
You can now edit values in a Data Grid component and then save the changed data back to the database. If the grid contains calculated columns that reference editable columns, the calculations can update live to reflect the latest user edits. This feature expands the available options in Axiom forms to allow users to review, edit, and save data.



Example Data Grid with editable columns to save data

User-selected rejection steps in plan file processes

Plan file processes now support user-selected rejection steps. When a step owner rejects the plan file, they can choose the step that the plan file should return to. This feature provides additional flexibility for plan file processes to meet your organization's particular process requirements.



Example approval step with user-selected rejection

Axiom form enhancements

- Data Grid components and Fixed Report components have been enhanced to accommodate a wider variety of use cases:
  - Calculations can now optionally be performed pre-aggregation or post-aggregation, depending on whether the calculation should be applied to the underlying data rows or to the report's grouping level.
  - You can now define conditional calculations for calculated columns, so that the calculation applied to rows can vary based on a condition.
- You can now process another document synchronously from within an Axiom form, so that the form immediately has access to the data saved by the document. This option can streamline form setup and potentially improve form performance by extracting process-intensive tasks to a dedicated document.

Other enhancements

- A more flexible and feature-rich option is now available to define calc method variables, which are used to prompt users for information when inserting rows into plan files. The CalcMethodVariables data source supports more variable types, as well as the ability to dynamically change the variable configuration based on information in the file.
- Administrators and process owners can now move plan files to different steps in a plan file process using either the web Process Directory or the Process Routing page. This expands the ability to make administrative adjustments to a plan file process within the Web Client.

- Plan file processes can now automatically copy plan files to another file group when a process step is completed. This feature can be used to support file group versioning in conjunction with a plan file process.

What to know before upgrading

This section details the upgrade considerations and technical changes that apply when upgrading to version 2020.1. Please make sure to review this section carefully before upgrading.

Upgrade considerations

The following upgrade considerations apply when moving from the most recent Axiom Software release of 2019.4 to the new release of 2020.1. If you are upgrading from an earlier version, please also see the release notes for the interim versions for any additional upgrade considerations.

Removal of deprecated Data Explorer feature	
Description	The Data Explorer feature has been deprecated in favor of the existing Web Reports feature and the developing Axiom Intelligence reporting feature. Since the introduction of the browser-based Report Builder in 2018.1, Data Explorer has been supported for backward-compatibility only. In version 2020.1 the deprecated Data Explorer feature has been removed. Any assets and features relating to the Data Explorer, including data sets for use with Data Explorer, will be removed when you upgrade. Removing deprecated features helps to simplify our development and testing efforts.
Notes for testing and review	In our understanding, most if not all clients have already discontinued use of Data Explorer. If you have any concerns about the removal of this deprecated feature, please contact Axiom Support. As part of the database upgrade to version 2020.1, Axiom Software checks for the presence of Data Explorer files in the system and displays a warning if any are found. The upgrade can be canceled at that point if desired.

Removal of deprecated Workflow feature	
Description	The Workflow feature was replaced several years ago by *plan file processes* in Process Management. At that time, workflow was deprecated and hidden in all systems, except in existing systems that were actively using it. Since then, it has been supported for backward-compatibility only, to give clients time to migrate to plan file processes. In version 2020.1, the deprecated Workflow feature has been removed. Any assets and features related to workflow will be removed when you upgrade. Removing deprecated features helps to simplify our development and testing efforts.
Notes for testing and review	In our understanding, the vast majority of clients who once used workflow have already migrated to using plan file processes. However, if any clients are still using workflow, you should migrate the workflow to a plan file process before upgrading to 2020.1. If you have any concerns about the removal of this deprecated feature, please contact Axiom Support. As part of the database upgrade to version 2020.1, Axiom Software checks for the presence of workflow files in the system and displays a warning if any are found. The upgrade can be canceled at that point if desired.

Removal of deprecated plan file process assignment behavior

Description	As part of the removal of the Workflow feature, a system configuration setting named **LegacyWorkflowAdminMode** and its associated behavior were also removed. Although this configuration setting was intended for use with workflow, if it was enabled, it also impacted role assignment behavior in plan file processes relating to administrator users. When a role assignment is used in either workflow or a plan file process, users in the role are made plan file owners based on their plan file filters in security. In older versions, if an administrator user belonged to the role, the administrator would become an owner of all plan files because the administrator has access to all plan files. This was rarely the intended result of the role assignment, so the behavior was changed so that administrator users in roles only become assigned as plan file owners if they have an actual plan file filter defined in security for this purpose. When this behavior change was made several years ago, the LegacyWorkflowAdminMode system configuration setting was provided so that if needed, a client could temporarily continue using the legacy behavior until they had time to adjust the security settings for the administrator. The setting was False by default, so all clients got the new behavior automatically unless they explicitly chose to enable the legacy behavior. The release notes at the time advised clients that the legacy behavior would likely be removed in the future. As of 2020.1, it has been removed.
Notes for testing and review	The vast majority of clients do not have this system configuration setting enabled. If you are a long-term client who used to use workflow before migrating to plan file processes, there is a small possibility that the configuration setting may be enabled. Even if it is, the change will only affect your implementation if you are using role assignments in plan file processes where users with the **Administrator** permission belong to the role. As part of the database upgrade to version 2020.1, Axiom Software checks to see if this system configuration setting is enabled, and displays a warning if so. The upgrade can be canceled at that point if desired.

Minor Axiom query behavior changes involving calculated fields

Description	Calculated fields were updated in version 2020.1 in order to make queries using these fields more efficient. Calculated fields are automated calculations based on column sequences in a table, such as YTD, CUR, TOT, and Q1. Due to these changes, the following uses of calculated fields in Axiom queries are no longer supported: • Using a calculated field in the sum by of an Axiom query. • Using a calculated field in the limit query statement of an Axiom query. We are not aware of any valid use cases for these configurations. The likelihood of any system having an Axiom query with one of these configurations is very small.
Notes for testing and review	This change should not adversely affect any clients. In the unlikely event that a client has an existing Axiom query that uses this configuration, the query will fail with a SQL error. If this occurs, please report the issue to Axiom Support so that we can understand and address the use case.

Behavior correction for Scheduler's Process Document List task

Description	The Process Document List task in Scheduler now properly requires the user executing the task to have **Allow Save Data** permission for the document(s) being processed by the task. In previous releases, the task was not checking for this permission, though it still checked for overall permission to the documents and for write permission to the target tables.This change means that the task now enforces the expected behavior for document save-to-database processing.
Notes for testing and review	In rare cases, this change may result in a user being unable to execute a Scheduler task that they were previously able to. If this occurs, you should update the user's security permission to the documents being processed so that the user has the Allow Save Data permission for these documents.

Deprecation of Process Tasks page in the Web Client

Description	The Process Tasks page in the Web Client is now considered a deprecated feature. This page has been superseded by the Process Directory page, and is no longer necessary. Any features that used to link to this page now link to the Process Directory page. At this time, the page still exists and still works as it did before. However, we are making this announcement because we plan to eventually remove this feature in a future release. If you are using this feature—which would only be possible if you have created a custom asset to link to the page—we recommend that you migrate your custom asset to point to the Process Directory page instead. If you have any concerns about the potential removal of this feature, please contact Axiom Support to discuss your use case. The Process Tasks page lists the current user's active process tasks in a particular process, and allows the user to complete these tasks. These activities can be performed on the Process Directory page instead. The only activity that cannot be performed on the Process Directory page is to complete multiple tasks in bulk.
Notes for testing and review	The vast majority of clients do not use this page and therefore can ignore this notice. Any clients who are using this page in their custom assets can continue using it for the time being, but should plan to migrate to the Process Directory page when it is convenient. If you are not sure whether your system is using this page, please see the following topic in Axiom Software Help for more information: *Using the Process Tasks page* (AX1518).

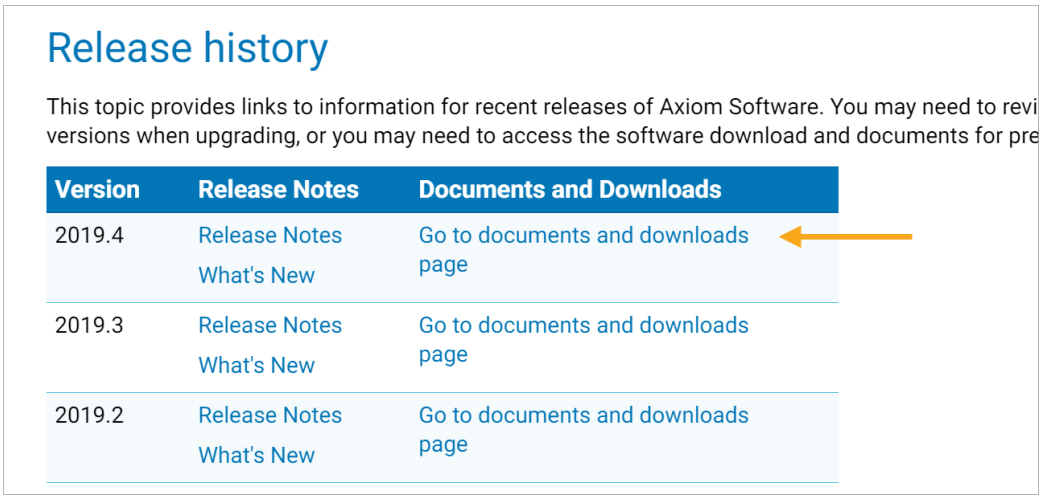
Installation and technical changes

The following installation and technical changes apply when upgrading to version 2020.1.

Database upgrade requirements

The upgrade to version 2020.1 requires the Axiom Software database to be at version 2018.4 or higher. Therefore if your system is 2018.3 or earlier, you must first upgrade your database using any version of the 2019.x Software Manager. After that, you can use the 2020.1 Software Manager to upgrade your system as normal. If needed, you can obtain an older version of the Software Manager as follows:

- Visit the **Release History** page in Axiom Software Help. You can search on "Release History" or "AX1753" to find this page.
- Find 2019.4 in the list, and click **Go to Documents and Downloads page**.

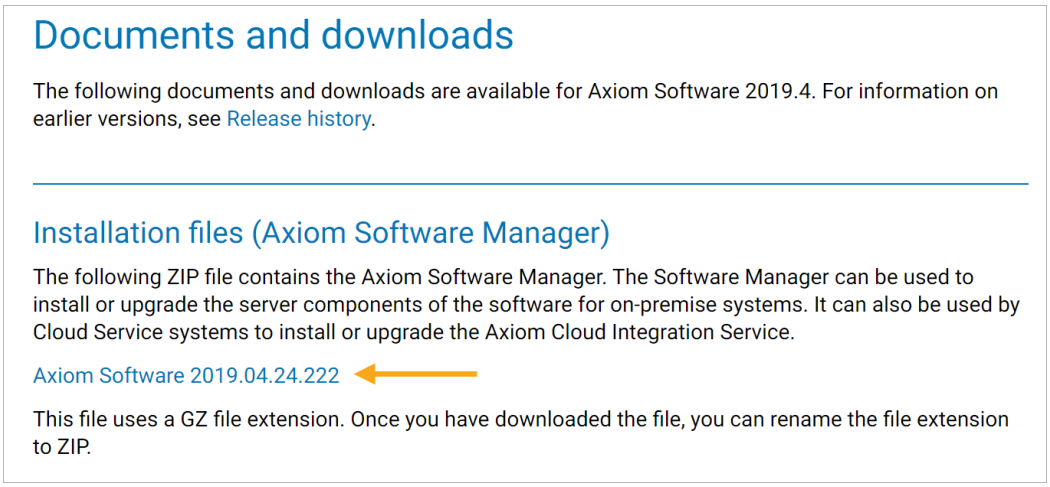


Release history

This topic provides links to information for recent releases of Axiom Software. You may need to revi
versions when upgrading, or you may need to access the software download and documents for pre

Version	Release Notes	Documents and Downloads
2019.4	Release Notes What's New	Go to documents and downloads page
2019.3	Release Notes What's New	Go to documents and downloads page
2019.2	Release Notes What's New	Go to documents and downloads page

- Click the link under **Installation files** to download the installation package.



Documents and downloads

The following documents and downloads are available for Axiom Software 2019.4. For information on earlier versions, see Release history.

Installation files (Axiom Software Manager)

The following ZIP file contains the Axiom Software Manager. The Software Manager can be used to install or upgrade the server components of the software for on-premise systems. It can also be used by Cloud Service systems to install or upgrade the Axiom Cloud Integration Service.

Axiom Software 2019.04.24.222

This file uses a GZ file extension. Once you have downloaded the file, you can rename the file extension to ZIP.

This note primarily applies to on-premise installations. If you have a Cloud Service system, Axiom Support will take care of the necessary updates when upgrading your system.

Updated Microsoft .NET Framework requirement

The minimum required version of Microsoft .NET Framework is now 4.8. This applies to all Axiom Software client and server applications. Please make sure all relevant servers and client workstations meet this requirement before proceeding with the upgrade to 2020.1.

- To install or upgrade server applications, the minimum required .NET version must be present on the server in order to run the Axiom Software Manager.
- To install or upgrade client applications, the minimum required .NET version must be present on the client workstation in order to run the Microsoft ClickOnce installer.

In both cases, if the requirement is not present, a message displays about the missing requirement.

Removal of official support for certain end-of-life versions

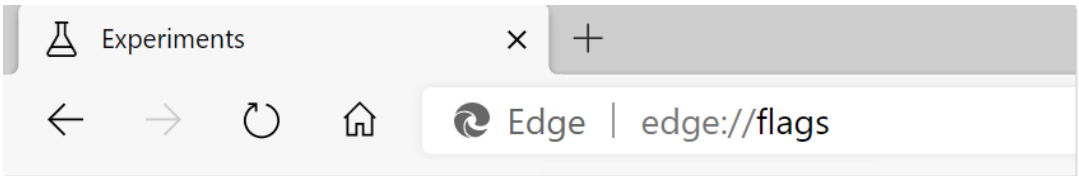
Windows Server 2012, SQL Server 2014, and Windows 7 are no longer officially supported for use with Axiom Software. These are all older versions that are no longer commonly used by our client base, and mainstream support is no longer provided by Microsoft.

Please note that at this time we have not made any changes to Axiom Software that would cause it to stop operating in these older versions. If you do happen to be using one of these versions, we anticipate that Axiom Software will continue working as it has been in previous releases. However, we have decided to discontinue official support in order to better focus our development, support, and testing efforts on more current and commonly used software versions. Because future releases may introduce breaking changes for these older versions, we strongly recommend discontinuing their use with Axiom Software as soon as it is feasible.

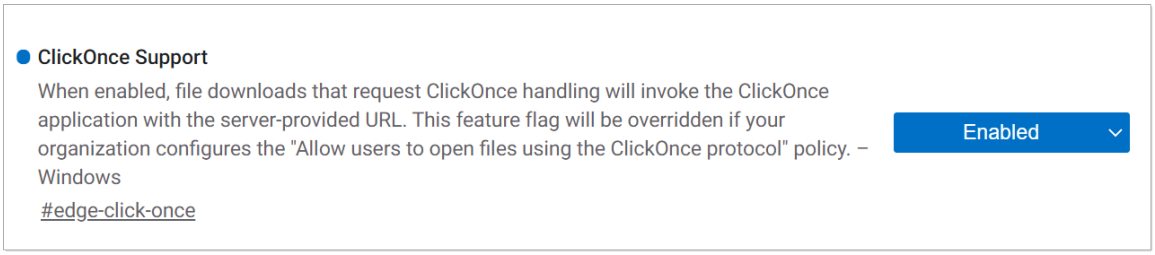
Configuration requirement to launch the Axiom Desktop Client from Edge

Microsoft is in the process of rolling out a new version of the Microsoft Edge browser. As of this writing, the new version of Edge does not support ClickOnce installation by default, the way that the old version of Edge did. In order to enable ClickOnce support and allow the Axiom Software Desktop Client to be installed and launched from the browser, you can adjust the configuration of Edge as follows:

1. Launch the Edge browser. In the address bar, type `edge://flags`.



2. Scroll down until you locate the item named **ClickOnce Support**. Select **Enabled** from the drop-down list.



3. Close Edge and then reopen it. You should now be able to install or launch the Axiom Windows Client or the Axiom Excel Client from the browser.

Optimized client installation behavior for patch releases

Version 2020.1 introduces an optimization to the client installation process for Axiom Software. Going forward, end users will no longer be prompted to reinstall the client after a normal patch is installed to the Axiom Application Server. Instead a minor download of updated files will occur automatically when an end user launches the client for the first time after the patch. This process should be transparent to the end user.

It is possible that some patches may contain technology or architecture updates that require the full client to be re-installed, but if this occurs it should be extremely rare.

Preparing and scheduling upgrades

Kaufman Hall strongly encourages clients to upgrade to the latest version, to keep your software current and to gain access to the new features and enhancements introduced in each release.

IMPORTANT: If your Axiom Software system includes installed vertical-specific products, please consult the release notes for the applicable product suite for further information and product-specific installation instructions.

1. **Review release notes**: Review this document to familiarize yourself with the new features and functionality, and any upgrade considerations.
2. **Schedule an installation date**: Submit a request to your organization's Axiom Master System User (MSU) to contact support@kaufmanhall.com to schedule an installation date and time, with at least three days advance notice. The request should include the following information:
    - Desired Axiom Software platform version.
    - Indicate whether to first refresh the test sandbox with a copy of the production instance of Axiom Software and apply update(s) to it. If so, provide the earliest date that Kaufman Hall can do this.
    - Propose an approximate two-hour downtime window when Kaufman Hall can apply updates to the production instance of Axiom Software during regular business hours: Monday through Friday, 7 AM to 7 PM Central (except holidays recognized by Kaufman Hall).

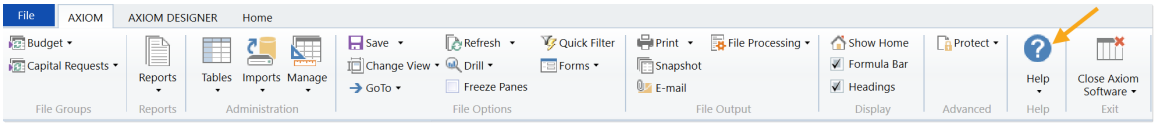
IMPORTANT: Although Kaufman Hall strives to maintain backward-compatibility with each release, any upgrade has the potential to interrupt system functionality. The Upgrade considerations section details known impacts to existing functionality, however, other impacts may be unforeseen at the time of release, or may be particular to your system. We strongly recommend performing the upgrade first on a test sandbox and then testing critical system functionality.

Getting help and training

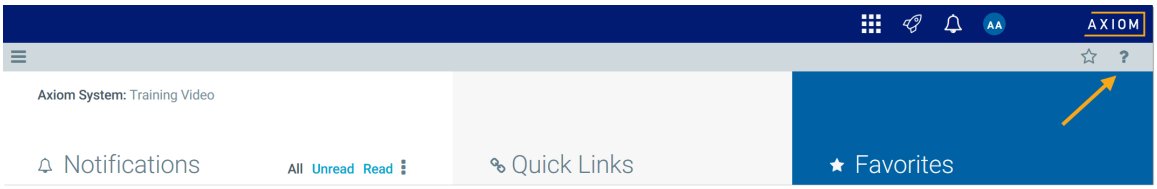
Kaufman Hall provides world-class resources at your fingertips directly within Axiom Software. In Axiom Help you can find comprehensive software documentation—including detailed instructions, examples, and reference information—as well as a troubleshooting knowledge base, documents, videos, release updates, and links to other resources such as training webinars.

Axiom Help is accessible from either the Desktop Client (Excel and Windows) or the Web Client:

- **Desktop Client**: On the **Axiom** ribbon tab, click **Help**.



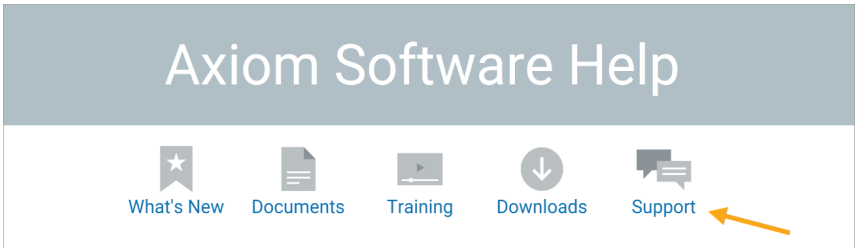
- **Web Client**: Click the question mark icon (**?**) in the top right of the gray task bar.



Context-sensitive help is also available throughout the software. In most dialogs, you can click the question mark icon (**?**) in the top right corner to access information about the current feature. Some pages in the Web Client also have context-sensitive help.

Escalating to Axiom Support

As always, we appreciate your commitment to Kaufman Hall. If you have any questions about upgrading to version 2020.1, please contact us by logging into Axiom Software, opening Axiom Help, and then clicking **Support**.



Issues fixed in 2020.1

The following issues were fixed in version 2020.1.

Item	Description	
22429	Issue:	In the Excel Client, GetData functions return a #NUM error for numeric columns when default value for the column is NULL, and there are no matching records or the records have NULL value.
	Status:	This configuration now returns a zero as expected.
31613	Issue:	The Unicode field is not configurable for table type required columns of String data type, which can cause mismatches between the table type and the table columns.
	Status:	The Unicode field is now present and configurable for table type required columns.
33371	Issue:	When columns with numeric values are referenced in process notifications, numeric formatting is not applied and the numbers display with many decimal places.
	Status:	Numeric columns now honor their configured numeric type to determine the display format.
36648	Issue:	Export to File processing may fail if the process is configured to email only but the output is set to Axiom Repository.
	Status:	The email only process now properly ignores the output location.
38837	Issue:	In some cases, attempting to launch Word fails after installing the Axiom Software Word add-in.
	Status:	This particular issue has been resolved, though it is possible that other unlikely circumstances may still cause the issue.
38841	Issue:	In some cases, using the Word add-in fails to open or save a Word document in the Axiom file system, even though the user is currently logged in to the system within the add-in.
	Status:	This particular issue has been resolved, though it is possible that other unlikely circumstances may still cause the issue.
41830	Issue:	After updating the Control Sheet, anchored cell references in other sheets that reference the Control Sheet are no longer anchored.
	Status:	These references should now remain anchored after a Control Sheet update.

Item	Description	
42117	Issue:	If a GetData function returns a numeric value with many digits, drilling may fail with an error about attempting to drill GetData functions that are wrapped within formulas.
	Status:	This configuration should now work as expected and not produce a false error.
43874	Issue:	The Tables task pane that displays when using Open Table in Spreadsheet does not filter the list of selectable tables as expected.
	Status:	The list is now filtered to only show tables that the user can open in Open Table in Spreadsheet.
46533	Issue:	In the Process Status dialog, clicking Edit Process Definition may cause the client to become non-responsive if the process definition references an assignment workbook with GetData functions.
	Status:	This issue should no longer occur.

Appendix: Version 2020.1 patches

This section details the fixes and enhancements in patch releases for Axiom Software version 2020.1. For assistance with any patch, please contact us by logging into Axiom Software, then open Help and click Support.

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

Current patch: 2020.1.34

This patch contains updates to the data query engine.

Patch 2020.1.32 - 2020.1.33

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

Patch 2020.1.31

This patch contains updates to internal tools. No client-facing changes are included in this patch.

Patch 2020.1.30

This patch contains back-end changes intended to improve performance for cloud systems.

Patch 2020.1.29

This patch contains back-end changes intended to improve performance for cloud systems.

Patch 2020.1.27 - 2020.1.28

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

Patch 2020.1.26

The following issues were fixed in this patch:

- 56651: Launching the Desktop Client may get stuck at the "Validating access rights" step.

Patch 2020.1.25

This patch contains some system configuration enhancements intended to improve performance when refreshing data for an Axiom Intelligence Reporting model.

Patch 2020.1.24

The following issues were fixed in this patch:

- 51934: An ambiguous column error may occur when running an Axiom query with a configuration that includes column filters and a table with multiple lookups to the same reference table.
- 54962: Newly created Axiom Intelligence reports cannot be saved.
- 55263: Performance may be slow for certain Axiom queries that use column filters.

Patch 2020.1.23

The following issues were fixed in this patch:

- 53446: Executing Save Type 3 causes table caches to be unnecessarily invalidated.
- 53471: An error may occur when running an Axiom query if the query references a calculated field in the filter and the calculated field consists of more than 400 columns.

Patch 2020.1.22

The following issues were fixed in this patch:

- 52141: When an import generates an error file, the file is blank and may also cause an error when attempting to open it.
- 52391: If a calculation in a Data Grid component references a column that has no matching data, the calculation returns zero instead of the expected results.
- 52406: If a calculated field is used in the data filter of a Fixed Report component, an error occurs attempting to fetch the data.

Patch 2020.1.21

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

Patch 2020.1.20

The following issues were fixed in this patch:

- 51346: A "method not found" error may occur when running a 2019.x product version in platform version 2020.1.

Patch 2020.1.19

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

Patch 2020.1.18

The following issues were fixed in this patch:

- 42252: If a sheet name in the File Processing settings is configured to only use a token—such as `[Current_Value]`—the configuration is erroneously flagged as invalid.
- 49890: If a calculated field is listed in both the data filter and the field definition of an Axiom query, an "ambiguous column" error occurs.
- 50720: Exporting a very large formatted grid from an Axiom form to Excel takes much longer in versions 2019.4 and up.

Patch 2020.1.17

The following issues were fixed in this patch:

- 50072: If a grouping is specified for a file group, the plan files do not display as grouped in dialogs such as Open Plan Files.
- 50102: If a preferred name for a column matches a database reserved name, an "incorrect syntax" error occurs when running an import that includes the column.

Patch 2020.1.16

The following enhancements were included in this patch:

- Import behavior was enhanced so that when importing data into a partitioned table, the import only reads the partitions affected by the import. This change is intended to improve import performance for partitioned tables.

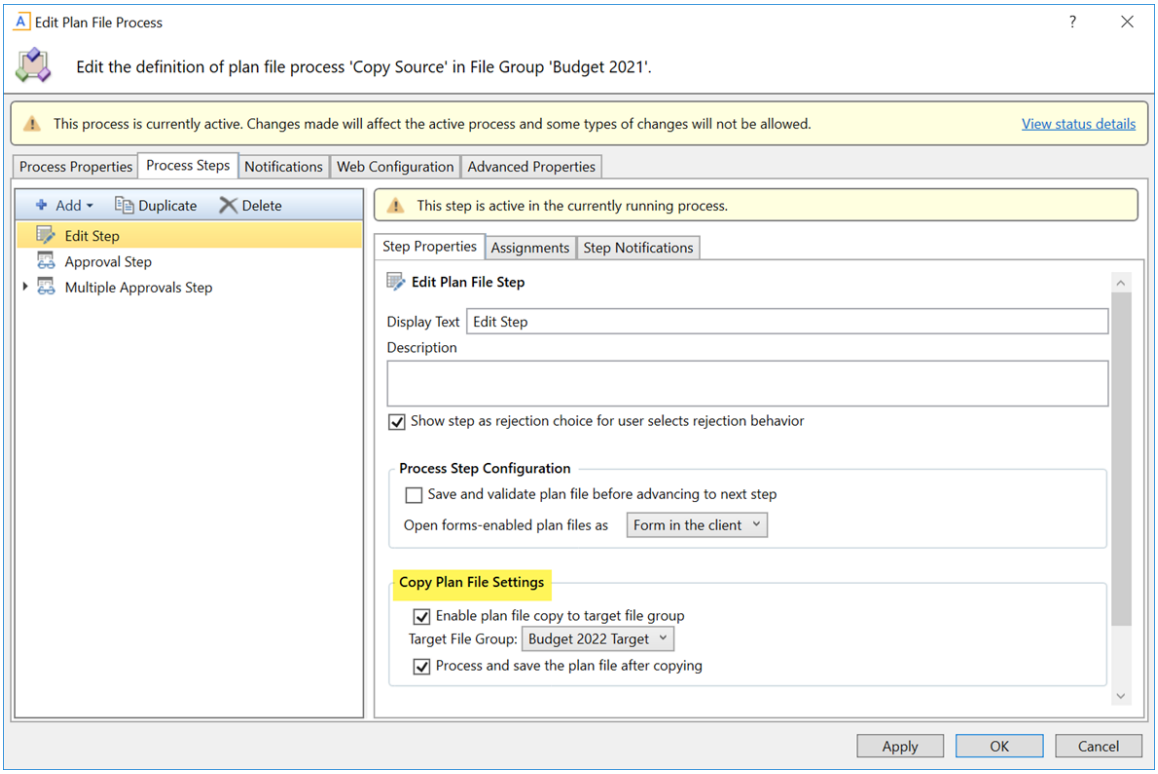
The following issues were fixed in this patch:

- 49615: Data Grid components may fail to render with an "invalid filter" error if the Data Filter on the grid references a process column.
- 49616: Axiom queries using a post-query filter may fail with an "invalid column" error if the filter references a column that is not on the primary table.

Patch 2020.1.15

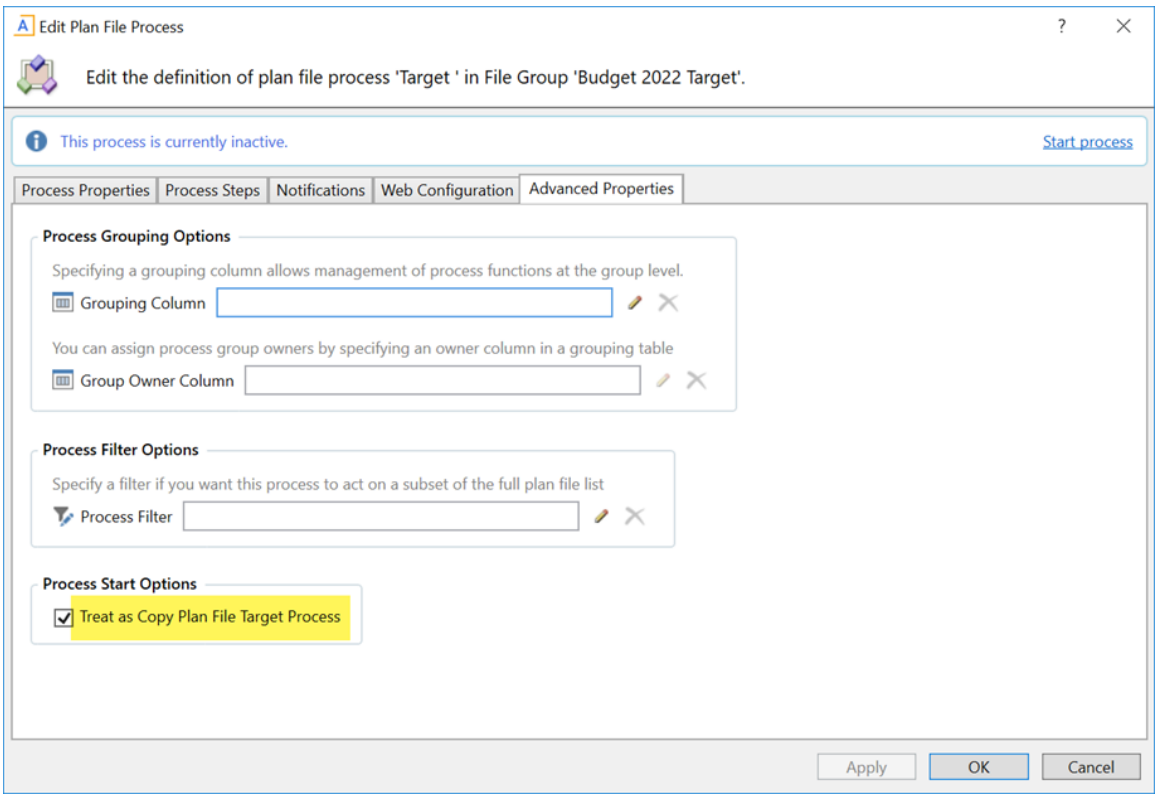
The following enhancements were included in this patch:

- The **Copy Plan File Settings** are now also available on edit steps of plan file processes, if the system configuration setting **ShowCopyPlanFilesActionInProcess** is enabled. Previously, the copy options were only available on approval steps.



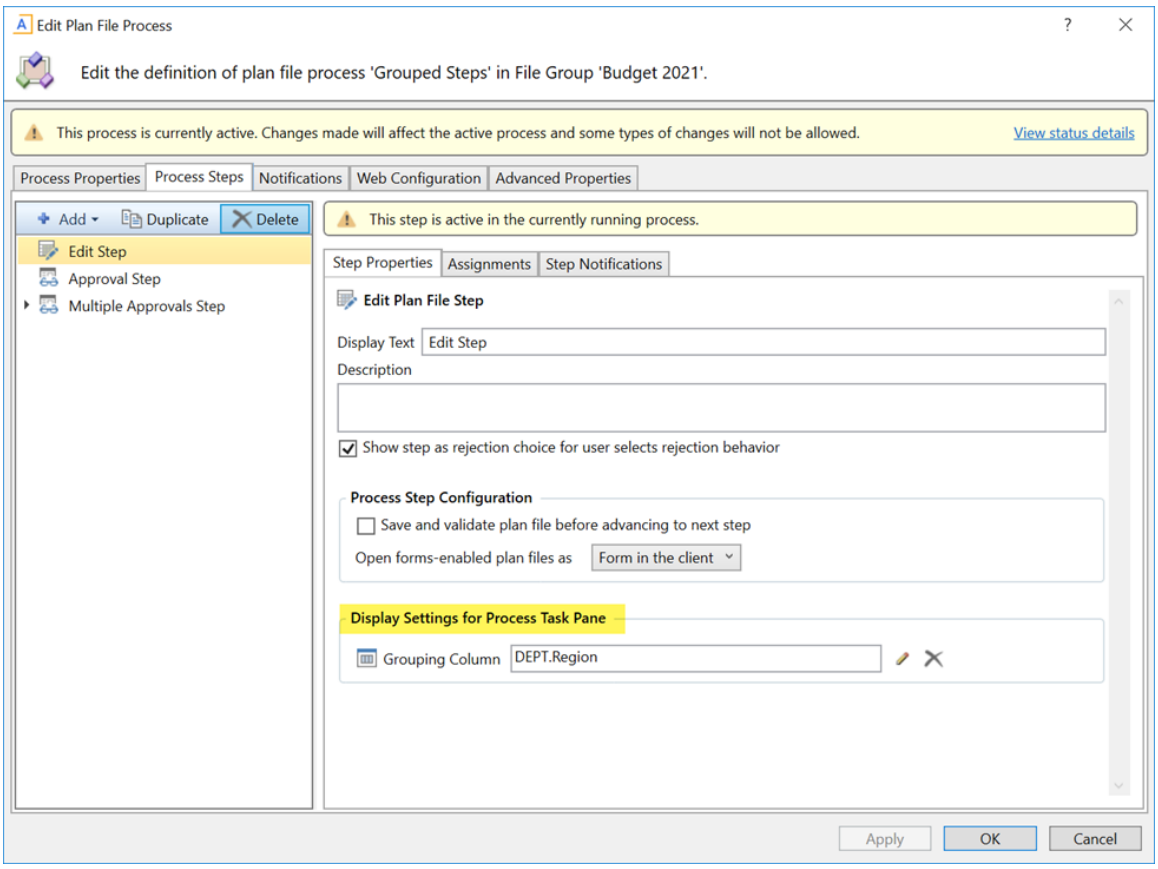
Copy plan file action now available for edit steps

- A new option, **Treat as Copy Plan File Target Process**, is now available on the **Advanced Properties** tab of plan file processes, if the system configuration setting **ShowCopyPlanFilesActionInProcess** is enabled. This option can be enabled on the plan file process of the target file group for a copy plan files action, so that copied plan files are automatically started in the process. For more information, see the following topic in Axiom Software Help: *Copying plan files when a process step is completed* (AX1123).



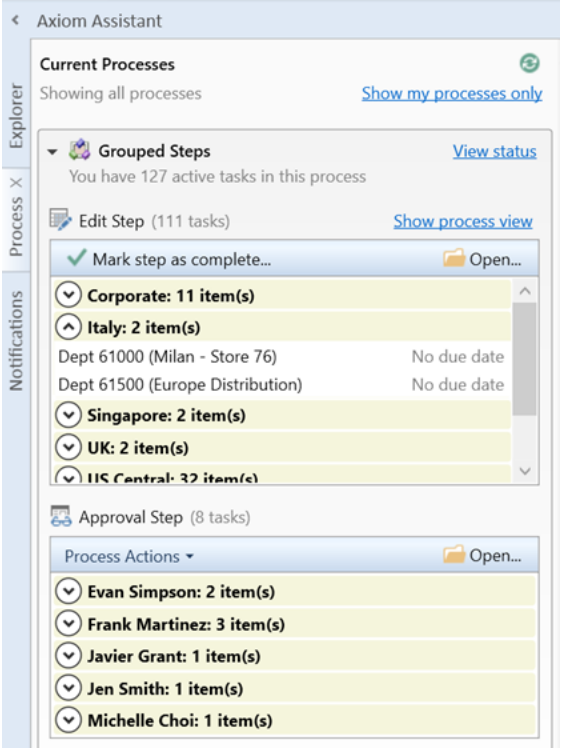
New option to treat process as the target for a copy plan files action

- A new option to specify a grouping column is now available on edit steps and approval steps of a plan file process. If a grouping column is specified, then the tasks for that step display in expandable/collapsible groupings using the values in that column. For example, if the grouping column is Dept.Region, then tasks display grouped by regions such as US West, US East, and so on. This option is intended to be used for steps where users may have many active tasks at one time, so that the groupings can help the step owners identify and complete their tasks.



New option to show tasks for a step in groupings

This option only affects the display of tasks in the Process task pane of the Desktop Client (or in any custom task pane using the **User Process View** command).



Tasks shown in groups within Process task pane

- The **Delete Rows** transform for imports now uses truncate to delete rows when possible.

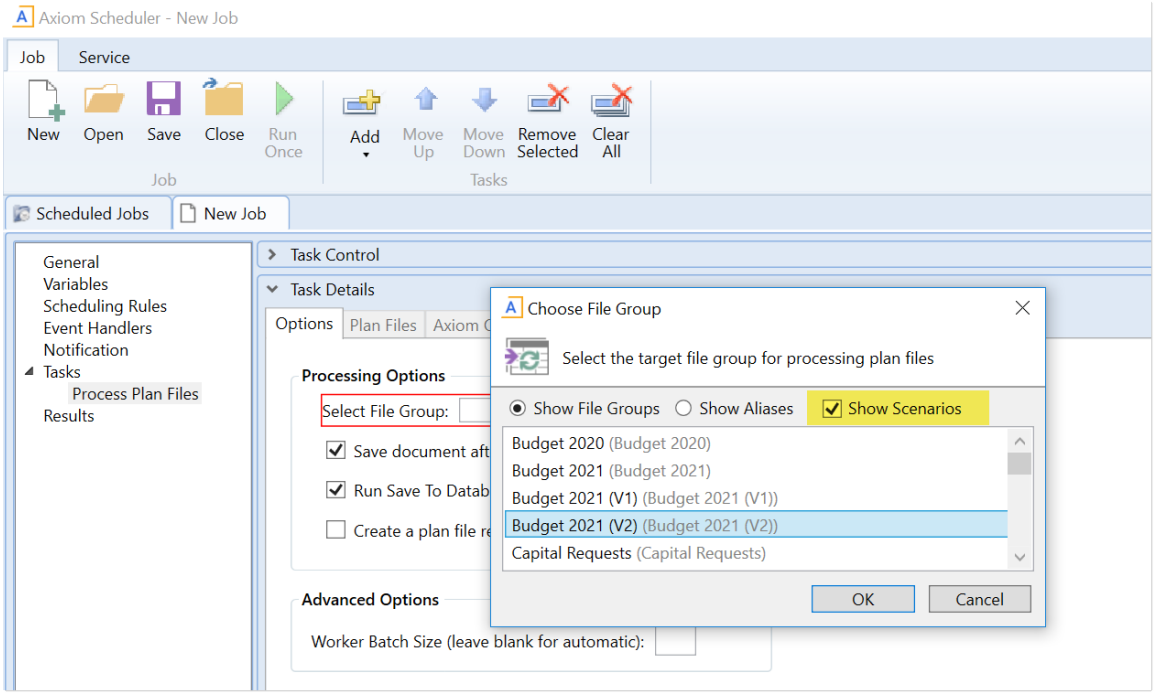
The following issues were fixed in this patch:

- 49526: For certain data structures and report configurations, an ambiguous column error may occur when refreshing an Axiom query.

Patch 2020.1.14

The following enhancements were included in this patch:

- You can now schedule plan file processing for file group scenarios. When configuring a Process Plan Files task in Scheduler, you can use the new **Show Scenarios** option in the **Choose File Group** dialog to select a file group scenario for processing.



The following issues were fixed in this patch:

- 49038: When using a HierarchyFilter refresh variable in the Web Client, an inaccurate filter may be created if a hierarchy node has many items and more than 10 of them are selected for the filter.

This patch also contains security updates.

Patch 2020.1.13

The following issues were fixed in this patch:

- 48476: In some cases, deadlock errors may occur when performing file group cloning.

Patch 2020.1.12

The following issues were fixed in this patch:

- 48404: Reports with many column filters may have slow performance.
- 48532: If a calculated column in a Data Grid or Fixed Report component references another calculated column, the calculation with the reference is omitted from total rows.

Patch 2020.1.11

The following issues were fixed in this patch:

- 48167: The Desktop Client does not route traffic to the proxy when configured to do so via the Software Manager, resulting in a failure to launch.