



Release Notes  
Axiom Software  
Version 2020.2



KaufmanHall

AXIOM

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# About the release notes

Kaufman Hall is pleased to announce the release of **Axiom Software Version 2020.2**. 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

Version 2020.2 was originally released on June 22, 2020.

# 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 2020.2, or see the *What's New* section in Axiom Help.

## ► Save data from a fixed report

You can now edit values in a Fixed Report component and then save the changed data back to the database. If the report 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.

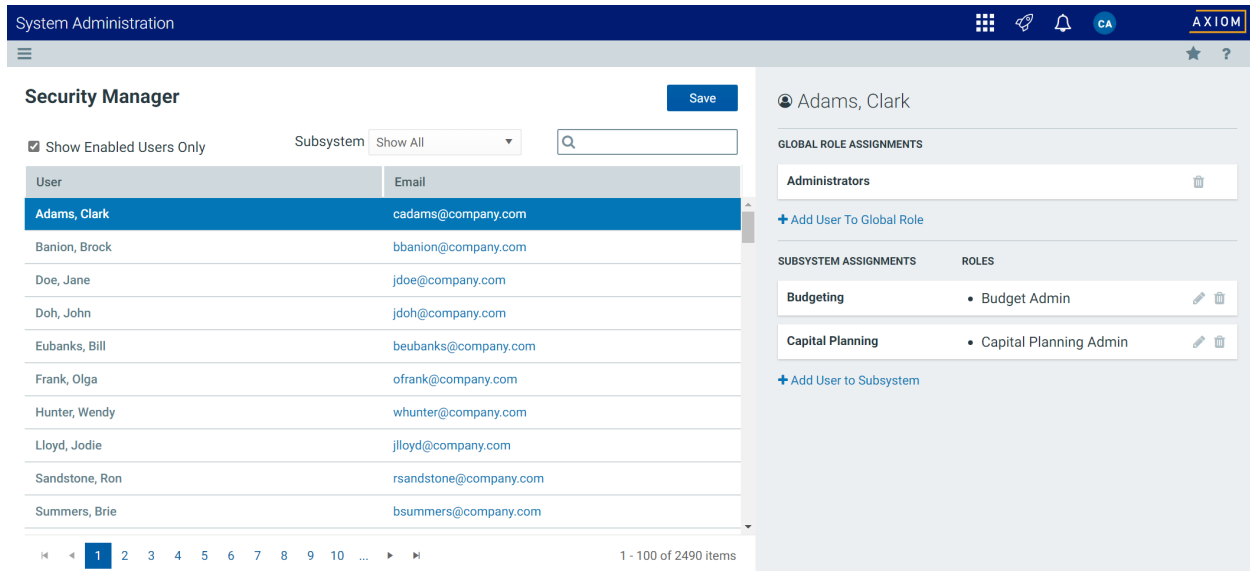
000010  
dept000010 | Labor Planning

| OVERVIEW                    |   | POSITION PLANNING | DISTRIBUTION SUMMARY |          | OTHER LABOR      |             | SUMMARY     |             |                   |             |                 |  |
|-----------------------------|---|-------------------|----------------------|----------|------------------|-------------|-------------|-------------|-------------------|-------------|-----------------|--|
| Position ID                 | Description                             | Note              | Bargaining Unit      | Pay Type | Current Base Pay | Adjustments |             |             | Proposed Base Pay | Merit       | Proposed Salary |  |
|                             |   |                   |                      |          |                  | Adj. %      | Adj. \$     | Other Adj.  |                   |             |                 |  |
| Staff Non Exempt            |   |                   |                      |          |                  |             |             |             |                   |             |                 |  |
| <a href="#">Q H0001798</a>  | Executive Assistant                     |                   | Classified           | Hourly   | \$24.09          | 0.00%       | \$0.75      | \$0.00      | \$24.84           | \$10,019.94 | \$61,679.65     |  |
| <a href="#">Q N00001004</a> | Open Part Time Office Assistant         |                   | Classified           | Salary   | \$0.00           | 0.00%       | \$0.00      | \$0.00      | \$0.00            | \$0.00      | \$0.00          |  |
| Total Staff Non Exempt      |   |                   |                      |          |                  |             |             |             |                   |             |                 |  |
| Staff Exempt                |   |                   |                      |          |                  |             |             |             |                   |             |                 |  |
| <a href="#">Q S0001717</a>  | President                               |                   | Unclassified         | Salary   | \$421,898.00     | 0.00%       | \$15,000.00 | \$15,000.00 | \$451,898.00      | \$84,379.60 | \$536,277.60    |  |
| <a href="#">Q S000187</a>   | Associate Vice President                |                   | Unclassified         | Salary   | \$113,488.01     | 3.00%       | \$500.00    | \$0.00      | \$117,392.65      | \$22,697.60 | \$140,090.26    |  |
| <a href="#">Q S198198</a>   | Assistant to the President for Planning | ⚠                 | Unclassified         | Salary   | \$50,445.38      | 10.00%      | \$500.00    | \$0.00      | \$55,989.91       | \$10,089.08 | \$66,078.99     |  |
| <a href="#">Q S000340</a>   | Planning Specialist                     |                   | Unclassified         | Salary   | \$100,000.00     | 5.00%       | \$5,000.00  | \$0.00      | \$110,000.00      | \$20,000.00 | \$130,000.00    |  |
| <a href="#">Q S030394</a>   | Senior Executive Assistant              |                   | Unclassified         | Salary   | \$71,255.60      | 5.00%       | \$3,000.00  | \$0.00      | \$77,818.38       | \$14,251.12 | \$92,069.50     |  |
| <a href="#">Q S000472</a>   | Special Assistant to the President      | 👤                 | Unclassified         | Salary   | \$72,375.00      | 0.00%       | \$50,000.00 | \$0.00      | \$122,375.00      | \$14,475.00 | \$136,850.00    |  |
| Total Staff Exempt          |   |                   |                      |          |                  |             |             |             |                   |             |                 |  |

*Example Fixed Report component with editable columns to save data*

## ► Manage role and subsystem assignments in the Web Client

You can now assign users to roles and subsystems using the browser-based Web Client, instead of needing to launch the Desktop Client. The new web Security Manager is intended to provide a quick and user-friendly way to manage role and subsystem assignments.



Example Security Manager in the Web Client

## ► File group enhancements

- You can now control which tables get cloned when creating a file group scenario by configuring the scenario cloning behavior for table variables. The default cloning behavior is still available, but you can now override this behavior on a per table variable basis and specify whether the table should be ignored, cloned without data, or cloned with data. This expands the usefulness of the file group scenario feature, so that it applies to a wider variety of file group designs.
- File group scenarios can now be created and processed using Scheduler. Leveraging server-side processing improves performance for these tasks, and also allows them to be scheduled for execution during off-hours.
- Scheduler jobs can now be stored as file group utilities, so that tasks in the job can be automatically associated with the current file group and update when the file group is cloned. Additionally, Scheduler event handlers referenced in these jobs are now associated with the file group, so that you can use RunEvent to only trigger jobs within a particular file group.

## ► Other enhancements

- You can now optionally display process tasks in expandable/collapsible groups within the Process task pane. This may be useful for steps where task owners have many plan files, to help them identify and complete tasks by group.
- The Copy Plan Files feature for plan file processes has been enhanced so that it can be used on either edit or approval steps. Additionally, the plan file process in the target file group can now be configured so that plan files are automatically started in the process when they are copied.
- Data Grid components for Axiom forms have been enhanced so that you can now use icons in the grid to launch URLs stored in a table column.

# What to know before upgrading

This section details the upgrade considerations and technical changes that apply when upgrading to version 2020.2. 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 2020.1 to the new release of 2020.2. If you are upgrading from an earlier version, please also see the release notes for the interim versions for any additional upgrade considerations.

### Changes to the File Group Scenario creation process

#### Description

The file group scenario creation process was enhanced in 2020.2 to provide you with greater control over how scenario tables are created. As a result of these enhancements, some actions that used to be available in prior versions are no longer available:

- The values of table variables and picklist variables are no longer displayed when creating file group scenarios. The only purpose of this functionality was to provide limited control over scenario table creation, so that you could optionally prevent a table from being cloned by editing the variable value for the scenario to match the current variable value. Going forward, this is no longer necessary because the table variable properties allow you to configure the table to not be cloned when creating scenarios.
- Picklist tables associated with picklist variables are no longer cloned when creating a scenario. This was unintended behavior and is considered to be a fixed issue rather than a behavior change.
- Once a scenario is created, the table variable property **Allow file group to save data to this table** is now only editable in the scenario if the variable value is a scenario table.

#### Notes for testing and review

These changes are minor and should not adversely affect any clients who currently use the file group scenario feature. If you were previously editing a table variable value during scenario creation to prevent a table from being cloned, you can now set the **Scenario Cloning Behavior** for that variable to **Ignore** so that this will happen automatically. Instead of needing to edit scenario settings each time you make a scenario, you can make this configuration change in the file group once and it will apply to all scenarios created for that file group going forward.

For more information, see *Control how tables are cloned when creating file group scenarios* in the separate *What's New* document.

## Deprecation of Process Tasks page in the Web Client

### Description

The Process Tasks page in the Web Client is now considered to be a deprecated feature. This page has been superseded by the Process Directory page for some time now, and is no longer necessary.

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).

## Deprecation of Update Service for On-Premise Platform Upgrades

### Description

Use of the Axiom Update Service to perform on-premise platform upgrades is planned to be deprecated as of the upcoming 2020.3 release. However, the update service is still used to perform product package installations for on-premise clients, and therefore must still be installed on-premise for clients with upgradeable product installations.

### Notes for testing and review

Nothing to test or review for this item.

## Installation and technical changes

The following installation and technical changes apply when upgrading to version 2020.2.

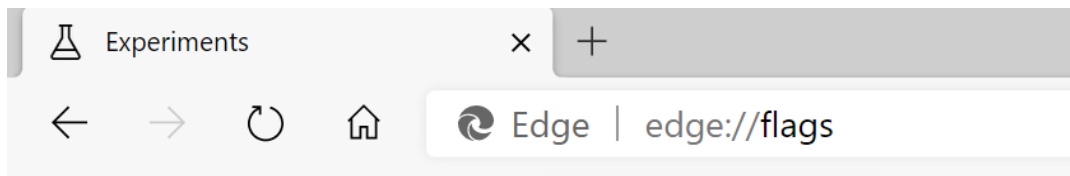
### ► Database upgrade requirements

The upgrade to version 2020.2 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 2020.2 Software Manager to upgrade your system as normal. This note primarily applies to on-premise installations. If you have an Axiom Cloud system, Axiom Support will take care of the necessary updates when upgrading your system.

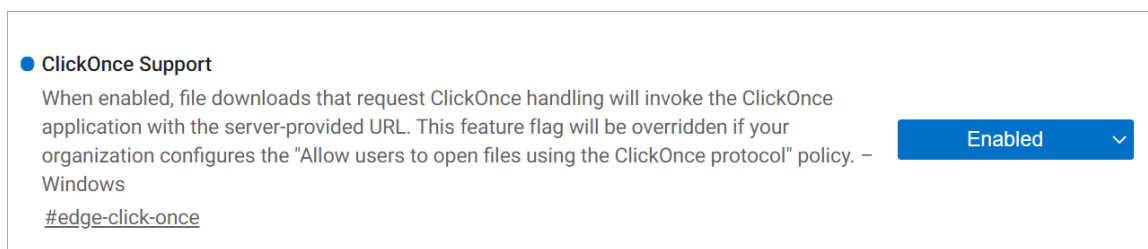
### ► Configuration requirement to launch the Axiom Desktop Client from Edge

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.



# 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](mailto: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).

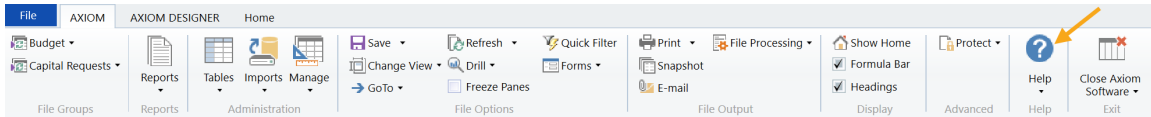
**IMPORTANT:** Although Kaufman Hall strives to maintain backward-compatibility with each release, any upgrade has the potential to interrupt system functionality. The [Upgrade considerations](#) section details known impacts to existing functionality, however, other impacts may be unforeseen at the 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**.



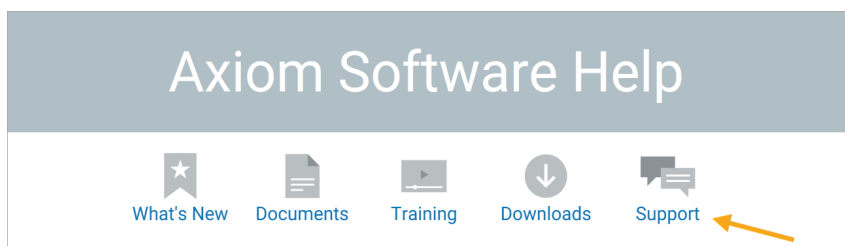
- **Web Client:** Click the question mark icon (?) in the top right of the gray task bar.



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 2020.2, please contact us by logging into Axiom Software, opening Axiom Help, and then clicking **Support**.



# Issues fixed in 2020.2

The following issues were fixed in version 2020.2.

| Item  | Description  |
|-------|--|
| 40431 | <p><b>Issue:</b> The Last Modified Date shown for plan files does not reflect the local time zone.</p> <p><b>Status:</b> The Last Modified Date now correctly reflects the local time zone for most system configurations. On-premise installations where servers and clients are in different time zones may still have an issue.</p> |
| 49094 | <p><b>Issue:</b> In the Web Client, if you search in a Hierarchy Filter refresh variable dialog and then select an item, the selection is not recognized.</p> <p><b>Status:</b> The selection is now recognized as expected.</p>   |
| 49112 | <p><b>Issue:</b> When a process is configured to be managed by groupings, and a grouping value contains an apostrophe, an error occurs when attempting to start the process for that group.</p> <p><b>Status:</b> This error should no longer occur.</p>   |
| 49142 | <p><b>Issue:</b> When an import generates an error file, the file is blank and may also cause an error when attempting to open it.</p> <p><b>Status:</b> The file should now contain the expected contents and can be opened without error.</p>  |

# Appendix: Version 2020.2 Patches

This section details the fixes and enhancements in patch releases for Axiom Software version 2020.2. For assistance with any patch, you can contact Support using [Syntellis Central](#).

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

## ▶ Current patch: 2020.2.31

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

## ▶ Patch 2020.2.30

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

## ▶ Patch 2020.2.29

This patch contains updates to the data query engine.

## ▶ Patch 2020.2.24 - 2020.2.28

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

## ▶ Patch 2020.2.23

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

## ▶ Patch 2020.2.22

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

## ▶ Patch 2020.2.21

The following issues were fixed in this patch:

- 61012: In certain situations, File Processing and Process Plan File tasks with heavy loads may fail with a "schema changed" error.

- 61761: Model processing for Axiom Intelligence reporting may fail with a timeout error when processing large partitioned tables.

► Patch 2020.2.20

This patch contains some model processing improvements for Axiom Intelligence reporting.

► Patch 2020.2.19

The following issues were fixed in this patch:

- 57094: The Delete Rows transform step in imports may fail if the target table for the transform is a reference table that other tables have lookups to.

► Patch 2020.2.18

The following issues were fixed in this patch:

- 56336: The "Advanced Options" section is no longer visible in certain File Processing Scheduler tasks.

► Patch 2020.2.17

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

► Patch 2020.2.16

The following issues were fixed in this patch:

- 54961: Newly created Axiom Intelligence reports cannot be saved.
- 55264: Performance may be slow for certain Axiom queries that use column filters.
- 55280: 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.

► Patch 2020.2.15

The following issues were fixed in this patch:

- 53445: Executing Save Type 3 causes table caches to be unnecessarily invalidated.
- 53470: 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 2020.2.14

The following issues were fixed in this patch:

- 52122: When using the Filter Wizard in the Web Client, if you attempt to filter the values of a selected column, the filter is not applied and instead the filter text displays in the values area.

- 52390: 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.
- 52405: If a calculated field is used in the data filter of a Fixed Report component, an error occurs attempting to fetch the data.
- 52613: An object reference error may occur when attempting to run an import in an Axiom Cloud system after upgrading the Cloud Integration Service to 2020.2.13.
- 52593: After changing the SAML authentication configuration for an Axiom Cloud system, an error may occur trying to log into the system via SAML.

**NOTE:** If you are currently running the 2020.2.13 version of the Axiom Cloud Integration Service, you should upgrade the service as part of installing this patch.

#### ► Patch 2020.2.13

The following issues were fixed in this patch:

- 51429: Numbers in formatted grids may display incorrectly if the grid uses lightweight auto-submit and an edited cell is fully scrolled off-screen and then scrolled back.

Additionally, Swedish translations were updated in the software.

#### ► Patch 2020.2.12

The following enhancements are in this patch:

- A new system configuration setting, **DefaultOracleFetchSizeKb**, is now available to control the fetch size when importing data from an Oracle database. By default, this is set to 1024KB (1MB). If this setting is changed, IIS should be reset on the Axiom Application Server to ensure that the cached value is not used.

The following issues were fixed in this patch:

- 51344: A "method not found" error may occur when running a 2019.x product version in platform version 2020.2.

Additionally, French and Dutch translations were updated in the software.

▶ Patch 2020.2.11



The following enhancements are in this patch:

- You can now optionally display process tasks in the Process task pane by description instead of by plan code. This option is configured per step in the **Display Settings for Process Task Pane** section, using the new option **Sort by Dimension Description**. By default, this option is disabled, so tasks will continue to display by plan code for any existing processes.

Process Properties | Process Steps | Notifications | Web Configuration | **Advanced Properties**

+ Add Duplicate Delete

Budget Development  
Management Approval  
Management Edits  
Finance Approval  
Final Approval

This step is active in the currently running process.

Step Properties | Assignments | Step Notifications

**Approval Step**

Display Text: Management Approval

Description: Approve this, yo

☒ Show step as rejection choice for user selects rejection behavior

**Process Step Configuration**

☐ Allow reviewers to edit the plan file

Open forms-enabled plan files as: Form in the client

**Step Rejection Behavior**

☒ Use default process setting ☐ Use step-specific setting

Process setting: Return to a step the user selects

**Display Settings for Process Task Pane**

☒ Sort by Dimension Description

Grouping Column:

*New option to display tasks by description*

Axiom Assistant

**Current Processes**

Showing my processes only [Show all processes](#)

**Budget Process** [View status](#)

You have 140 active tasks in this process

**Management Approval (140 tasks)** [Show process view](#)

Process Actions Open...

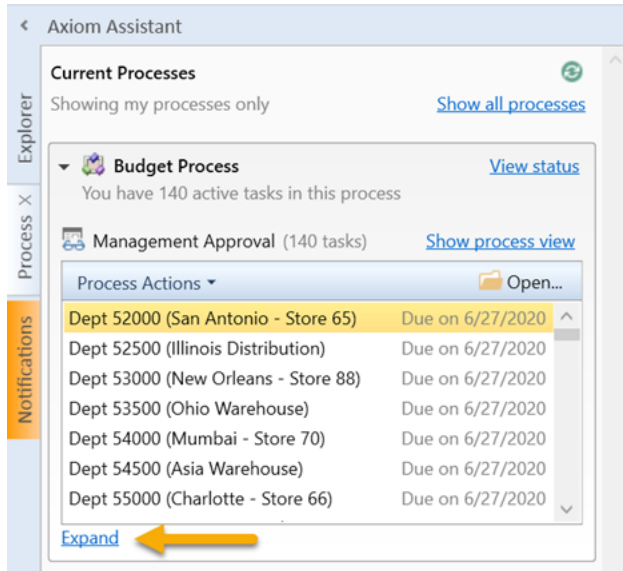
|                      |                  |
|----------------------|------------------|
| Arizona Distribution | Due on 6/27/2020 |
| Arizona Warehouse    | Due on 6/27/2020 |
| Asia Warehouse       | Due on 6/27/2020 |
| Charlotte - Store 66 | Due on 6/27/2020 |
| China Warehouse      | Due on 6/27/2020 |
| Colorado Warehouse   | Due on 6/27/2020 |
| Denver - Store 86    | Due on 6/27/2020 |

[Expand](#)

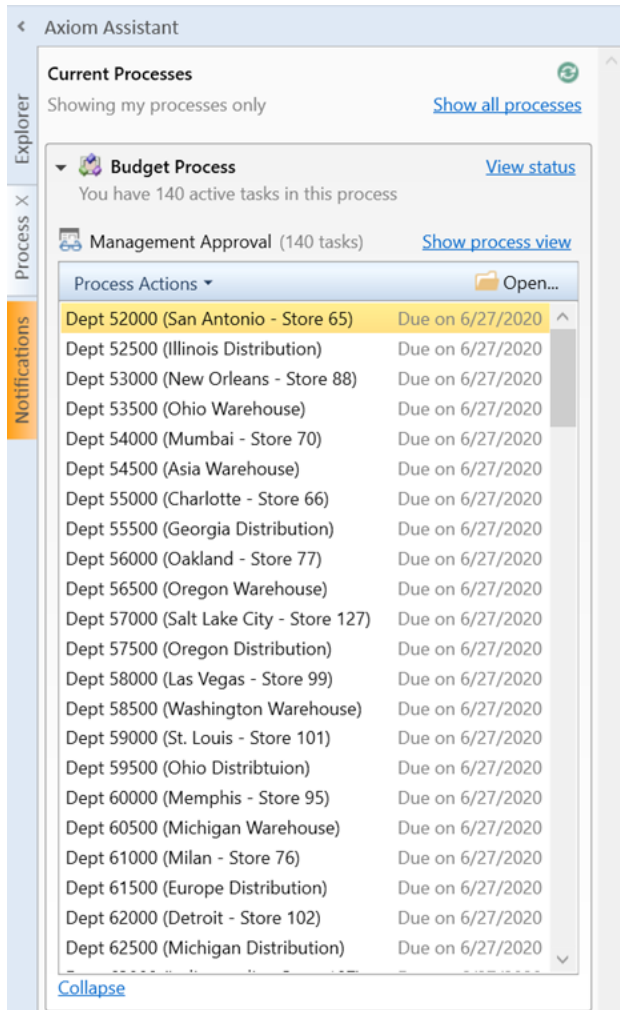
*Process task pane showing tasks by description instead of plan code*

**NOTE:** If this option is enabled, it only affects the display of tasks in the Process task pane. When you complete a task from the task pane, the Process Action dialog continues to display tasks by plan code and description.

- The task listings in the Process task pane now have the option to expand the list when the number of available process tasks exceeds the default height of the list. When you click **Expand**, the list expands to up to three times the default height, so that you can see more tasks without scrolling. You can then click **Collapse** to return the list to the default height.



*New option to expand the list of tasks*



Expanded list of tasks

The following issues were fixed in this patch:

- 50680: If an Axiom query uses a column filter such as `1=2`, the query fails with an error about a bad conditional expression instead of returning zeros.
- 50685: Exporting a very large formatted grid from an Axiom form to Excel takes much longer in versions 2019.4 and up.
- 50706: If a calculated field is listed in both the data filter and the field definition of an Axiom query, an "ambiguous column" error occurs.
- 50788: 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.

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