

What's New Axiom Software Version 2020.2



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# Introduction

Kaufman Hall is pleased to announce the release of **Axiom Software Version 2020.2**. This release features enhancements to various areas of the software, such as:

- New **Security Manager** feature in the Web Client, to assign users to roles and subsystems using an intuitive, browser-based interface
- Ability to edit and save data from **Fixed Report components** expands the options to review and modify data using Axiom forms
- Various enhancements to **file group scenarios**, including the ability to create and process scenarios using Scheduler, and greater control to configure exactly how tables are cloned for the scenario

This *What's New* document provides information on all new features and enhancements in this release. Reviewing this document should give you a basic understanding of how these new features work, and what benefits they may provide to your organization. For full details on any new feature, please see the Axiom Software Help files or the PDF guides.

**IMPORTANT:** Before upgrading to version 2020.2, make sure you have reviewed the separate *Release Notes* document to understand any important technical changes and upgrade considerations in this release.

# Axiom forms

This section details the new features and enhancements made to Axiom forms.

## Save data from Fixed Report components

You can now edit values in a Fixed Report component and then save changed data back to the database. This feature expands the available options in Axiom forms to allow users to review, edit, and save data.

This new feature is similar to the existing feature for Data Grid components, and works as follows:

- You can configure one or more report columns as editable, so that users can edit the value in the report by typing into the cell.
- You can configure calculated columns to update live, so that if the calculation references an editable column, the value in the calculated column updates in response to the user's input.
- You can enable saving data for the report, and specify a target table and columns for the save. When a save-to-database is triggered in the form, any report rows with edited data will be saved to the database.

### Configuring the report for editing and saving data

The component properties and the FixedReportColumns data source contain new fields to configure the ability to edit and save data in a Fixed Report component.

Primary Table	LaborRoster 🗙
Data Filter	×
Suppress Zeros in Data Rows	
Columns Data Source	RosterColumns 🗸 👫
Fixed Report Data Source	Roster 🗸 🍂
Component Dependencies	×
Hide Empty Sections	$\checkmark$
Enable Row Selection	
Auto Submit	
Enable Excel Export	
Enable Saving	$\checkmark$

1. In the component properties, select Enable Saving.

2. In the FixedReportColumns data source, for each column where you want the user to be able to edit values, enter True into the [IsEditable] column.

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37											
38	[FixedReportColumns;RosterColumn	[ColumnName]	[IsVisible]	[IsFrozen]	[Total]	[Width]	[Header]	[Calculation]	[IsEditable]	[IsLiveUpdate]	[Save;LaborBud]
53	[HeaderColumn]		TRUE	TRUE		250	Position ID				
54	[Column]	LaborRoster.Labor_Position	FALSE								LABOR_POSITION
55	[Column]	LaborRoster.Labor_Position.Description	TRUE	TRUE		200	Description				
57	[Column]		TRUE	TRUE		70	Note				
58	[Column]	LaborRoster.Labor_Position.BargainingUnit	TRUE			125	Bargaining Unit				
59	[Column]	LaborRoster.SalaryHourly;PayType	TRUE	FALSE		110	Pay Type				
66	[Column]	LaborRoster.PayRate;BasePay	TRUE	FALSE	FALSE	150	Current Base Pay				
69	[ColumnGroup]						Adjustments				
70	[Column]	LaborBud.SalaryAdjPct;RosterAdjPct	TRUE		FALSE	100	Adj. %		TRUE		SalaryAdjPct
71	[Column]	LaborBud.SalaryAdj;RosterAdj	TRUE		FALSE	100	Adj. \$		TRUE		SalaryAdj
73	[Column]	LaborBud.SalaryAdjTot;OtherAdj	TRUE		FALSE	125	Other Adj.				
74	[EndGroup]										
76	[CalculatedColumn]	RosterAdjTotal	TRUE		TRUE	150	Proposed Base Pay	BasePay+(BasePay * Roster/	AdjPct)+Roster	TRUE	
78	[Column]	LaborBud.SalaryAdjTot;MeritSal	TRUE		FALSE	125	Base Merit				
79	[CalculatedColumn]	MeritFinal	TRUE		TRUE	125	Merit	MeritCalc		TRUE	
81	[CalculatedColumn]	AdjSalHourlyFinal	TRUE		FALSE	125	AdjSalHourlyFinal	RosterAdjTotal * HourlyChee	ck	TRUE	
82	[CalculatedColumn]	AdjSalSalaryFinal	TRUE		FALSE	125	AdjSalSalaryFinal	RosterAdjTotal * SalaryChec	k/SalaryCheck	TRUE	
83	[CalculatedColumn]	AdjSalFinal	TRUE		FALSE	125	Salary Adj. Total	AdjSalHourlyFinal + AdjSalSa	laryFinal	TRUE	
84	[CalculatedColumn]		TRUE		FALSE	150	Proposed Salary Ori	BaseSal+AdjSalFinal+MeritFi	inal+(BaseSal *	TRUE	
85	[CalculatedColumn]	ProposedSalary	TRUE		TRUE	150	Proposed Salary	ProposedSalary		TRUE	

**NOTE:** If you use the right-click wizard to create a new FixedReportColumns data source, the [IsEditable] tag and the other new data source tags will be present by default. If you want to modify an existing FixedReportColumns data source to enable editing and saving, then you need to add the new tags manually. Remember that these tags can be in any order.

3. In the FixedReportColumns data source, for each calculated column that you want to update in response to user edits, enter True into the [IsLiveUpdate] column.

37											
38	[FixedReportColumns;RosterColumr	n [ColumnName]	[IsVisible]	[IsFrozen]	[Total]	[Width]	[Header]	[Calculation]	[IsEditable]	[IsLiveUpdate	[Save;LaborBud]
53	[HeaderColumn]		TRUE	TRUE		250	Position ID				
54	[Column]	LaborRoster.Labor_Position	FALSE								LABOR_POSITION
55	[Column]	LaborRoster.Labor_Position.Description	TRUE	TRUE		200	Description				
57	[Column]		TRUE	TRUE		70	Note				
58	[Column]	LaborRoster.Labor_Position.BargainingUnit	TRUE			125	Bargaining Unit				
59	[Column]	LaborRoster.SalaryHourly;PayType	TRUE	FALSE		110	Pay Type				
66	[Column]	LaborRoster.PayRate;BasePay	TRUE	FALSE	FALSE	150	Current Base Pay				
69	[ColumnGroup]						Adjustments				
70	[Column]	LaborBud.SalaryAdjPct;RosterAdjPct	TRUE		FALSE	100	Adj. %		TRUE		SalaryAdjPct
71	[Column]	LaborBud.SalaryAdj;RosterAdj	TRUE		FALSE	100	Adj. \$		TRUE		SalaryAdj
73	[Column]	LaborBud.SalaryAdjTot;OtherAdj	TRUE		FALSE	125	Other Adj.				
74	[EndGroup]										
76	[CalculatedColumn]	RosterAdjTotal	TRUE		TRUE	150	Proposed Base Pay	BasePay+(BasePay * RosterAd	djPct)+Roste	TRUE	
78	[Column]	LaborBud.SalaryAdjTot;MeritSal	TRUE		FALSE	125	Base Merit				
79	[CalculatedColumn]	MeritFinal	TRUE		TRUE	125	Merit	MeritCalc		TRUE	
81	[CalculatedColumn]	AdjSalHourlyFinal	TRUE		FALSE	125	AdjSalHourlyFinal	RosterAdjTotal * HourlyCheck	<	TRUE	
82	[CalculatedColumn]	AdjSalSalaryFinal	TRUE		FALSE	125	AdjSalSalaryFinal	RosterAdjTotal * SalaryCheck	/SalaryCheck	TRUE	
83	[CalculatedColumn]	AdjSalFinal	TRUE		FALSE	125	Salary Adj. Total	AdjSalHourlyFinal + AdjSalSal	aryFinal	TRUE	
84	[CalculatedColumn]		TRUE		FALSE	150	Proposed Salary Ori	BaseSal+AdjSalFinal+MeritFin	al+(BaseSal	TRUE	
85	[CalculatedColumn]	ProposedSalary	TRUE		TRUE	150	Proposed Salary	ProposedSalary		TRUE	

- 4. In the FixedReportColumns data source, configure the [Save; TABLENAME] column as follows:
  - Replace TABLENAME with the name of the target table for the save-to-database. For example, change the column tag to [Save; BGT2021] if you want to save edited report data to that table.
  - For each column in the report to be saved, enter the name of the target column in the target table. All key columns must be included in the save, as well as any other columns for which you want to save changed data.

Note that the [HeaderColumn] cannot be configured to save. In most cases this means you will need to add a non-visible column to the data source, in order to include the key shown in the header column in the save.

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37											
38	[FixedReportColumns;RosterColumn	[ColumnName]	[IsVisible]	[IsFrozen]	[Total]	[Width	[Header]	[Calculation]	[IsEditable]	[IsLiveUpdate	[Save;LaborBud]
53	[HeaderColumn]		TRUE	TRUE		250	Position ID				
54	[Column]	LaborRoster.Labor_Position	FALSE								LABOR_POSITION
55	[Column]	LaborRoster.Labor_Position.Description	TRUE	TRUE		200	Description				
57	[Column]		TRUE	TRUE		70	Note				
58	[Column]	LaborRoster.Labor_Position.BargainingUnit	TRUE			125	Bargaining Unit				
59	[Column]	LaborRoster.SalaryHourly;PayType	TRUE	FALSE		110	Pay Type				
66	[Column]	LaborRoster.PayRate;BasePay	TRUE	FALSE	FALSE	150	Current Base Pay				
69	[ColumnGroup]						Adjustments				
70	[Column]	LaborBud.SalaryAdjPct;RosterAdjPct	TRUE		FALSE	100	Adj. %		TRUE		SalaryAdjPct
71	[Column]	LaborBud.SalaryAdj;RosterAdj	TRUE		FALSE	100	Adj. \$		TRUE		SalaryAdj
73	[Column]	LaborBud.SalaryAdjTot;OtherAdj	TRUE		FALSE	125	Other Adj.				
74	[EndGroup]										
76	[CalculatedColumn]	RosterAdjTotal	TRUE		TRUE	150	Proposed Base Pay	BasePay+(BasePay * RosterA	djPct)+Roster	TRUE	
78	[Column]	LaborBud.SalaryAdjTot;MeritSal	TRUE		FALSE	125	Base Merit				
79	[CalculatedColumn]	MeritFinal	TRUE		TRUE	125	Merit	MeritCalc		TRUE	
81	[CalculatedColumn]	AdjSalHourlyFinal	TRUE		FALSE	125	AdjSalHourlyFinal	RosterAdjTotal * HourlyChec	k	TRUE	
82	[CalculatedColumn]	AdjSalSalaryFinal	TRUE		FALSE	125	AdjSalSalaryFinal	RosterAdjTotal * SalaryCheck	/SalaryCheck	TRUE	
83	[CalculatedColumn]	AdjSalFinal	TRUE		FALSE	125	Salary Adj. Total	AdjSalHourlyFinal + AdjSalSal	aryFinal	TRUE	
84	[CalculatedColumn]		TRUE		FALSE	150	Proposed Salary Ori	BaseSal+AdjSalFinal+MeritFir	nal+(BaseSal *	TRUE	
85	[CalculatedColumn]	ProposedSalary	TRUE		TRUE	150	Proposed Salary	ProposedSalary		TRUE	

To trigger the save-to-database in the form, you can use either of the following:

- An interactive component with **Save on Submit** enabled. Typically this is a Button component, however, the save can be triggered by any form component that supports the Save on Submit property.
- The save button in the gray Task Bar, if this button is enabled for the form.

#### **Example**

In the following example, the SalaryAdjPct and SalaryAdj columns have been configured as editable. Several calculated columns reference these editable adjustment columns, so the calculations have been configured to update live in response to user edits. Lastly, the save property has been configured to save the edits back to the LaborBud table. If desired, the calculations could also be saved back to the target table.

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37										
38	[FixedReportColumns;RosterColumr	[ColumnName]	[IsVisible]	[IsFrozen]	[Total]	[Width][Header]	[Calculation]	[IsEditable]	[IsLiveUpdate]	[Save;LaborBud]
53	[HeaderColumn]		TRUE	TRUE		250 Position ID				
54	[Column]	LaborRoster.Labor_Position	FALSE							LABOR_POSITION
55	[Column]	LaborRoster.Labor_Position.Description	TRUE	TRUE		200 Description				
57	[Column]		TRUE	TRUE		70 Note				
58	[Column]	LaborRoster.Labor_Position.BargainingUnit	TRUE			125 Bargaining Unit				
59	[Column]	LaborRoster.SalaryHourly;PayType	TRUE	FALSE		110 Pay Type				
66	[Column]	LaborRoster.PayRate;BasePay	TRUE	FALSE	FALSE	150 Current Base Pay				
69	[ColumnGroup]					Adjustments				
70	[Column]	LaborBud.SalaryAdjPct;RosterAdjPct	TRUE		FALSE	100 Adj. %		TRUE		SalaryAdjPct
71	[Column]	LaborBud.SalaryAdj;RosterAdj	TRUE		FALSE	100 Adj. \$		TRUE		SalaryAdj
73	[Column]	LaborBud.SalaryAdjTot;OtherAdj	TRUE		FALSE	125 Other Adj.				
74	[EndGroup]									
76	[CalculatedColumn]	RosterAdjTotal	TRUE		TRUE	150 Proposed Base Pay	BasePay+(BasePay * Roster	djPct)+Roster	TRUE	
78	[Column]	LaborBud.SalaryAdjTot;MeritSal	TRUE		FALSE	125 Base Merit				
79	[CalculatedColumn]	MeritFinal	TRUE		TRUE	125 Merit	MeritCalc		TRUE	
81	[CalculatedColumn]	AdjSalHourlyFinal	TRUE		FALSE	125 AdjSalHourlyFinal	RosterAdjTotal * HourlyChe	:k	TRUE	
82	[CalculatedColumn]	AdjSalSalaryFinal	TRUE		FALSE	125 AdjSalSalaryFinal	RosterAdjTotal * SalaryChec	<td>TRUE</td> <td></td>	TRUE	
83	[CalculatedColumn]	AdjSalFinal	TRUE		FALSE	125 Salary Adj. Total	AdjSalHourlyFinal + AdjSalSa	laryFinal	TRUE	
84	[CalculatedColumn]		TRUE		FALSE	150 Proposed Salary Ori	i BaseSal+AdjSalFinal+MeritF	nal+(BaseSal *	TRUE	
85	[CalculatedColumn]	ProposedSalary	TRUE		TRUE	150 Proposed Salary	ProposedSalary		TRUE	
							_			

Example FixedReportColumns data source configured to allow edits and save data

When the form is rendered, the editable column values display in editable cells:

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oo d	ept000010	Labor Pla	inning											
	OVERVIEW	POSITION	N PLANNING	DISTRIBUTIC	ON SUMMAR	RY O	THER LABOR	SUMMARY						
										Adjustments	3			
	Position II	D	Desc	ription	Note	Bargaining Unit	Pay Type	Current Base Pay	Adj. %	Adj. \$	Other Adj.	Proposed Base Pay	Merit	Proposed Salary
	Staff Non Exempt													
	Q H0001798		Executive Assista	int		Classified	Hourly	\$24.09	0.00%	\$0.50	\$0.00	\$24.59	\$10,019.94	\$61,159.65
	Q N00001004		Open Part Time (	Office Assistant		Classified	Salary	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Total Staff Non Exe	empt												
	Staff Exempt													
	Q S0001717		President			Unclassified	Salary	\$421,898.00	0.00%	\$15,000.00	\$15,000.00	\$451,898.00	\$84,379.60	\$536,277.60
	Q S000187		Associate Vice P	resident		Unclassified	Salary	\$113,488.01	3.00%	\$500.00	\$0.00	\$117,392.65	\$22,697.60	\$140,090.26
	Q S198198		Assistant to the F Planning	President for	A	Unclassified	Salary	\$50,445.38	10.00%	\$500.00	\$0.00	\$55,989.91	\$10,089.08	\$66,078.99
	Q S000340		Planning Speciali	st		Unclassified	Salary	\$100,000.00	5.00%	\$5,000.00	\$0.00	\$110,000.00	\$20,000.00	\$130,000.00
	Q S030394		Senior Executive	Assistant		Unclassified	Salary	\$71,255.60	5.00%	\$3,000.00	\$0.00	\$77,818.38	\$14,251.12	\$92,069.50
	Q S000472		Special Assistant	to the President	di la	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

When an edit is made to a value, the background color of the cell changes to yellow, to indicate that the report contains an unsaved change. In this example, the dollar adjustment for the hourly Executive Assistant position was changed to \$0.75. Because the calculated column RosterAdjTotal ("Proposed Base Pay") is configured for live updates, it has updated to show the new base pay using the edited adjustment value.

≡ <b>T</b>											
dept000010   Labor Pl	anning										
OVERVIEW POSITIC	DN PLANNING DISTRIBUT	ION SUMMA	RY OT	HER LABOR	SUMMARY						
							Adjustments	3			
Position ID	Description	Note	Bargaining Unit	Pay Type	Current Base Pay	Adj. %	Adj. \$	Other Adj.	Proposed Base Pay	Merit	Proposed Salary
Staff Non Exempt											
Q H0001798	Executive Assistant		Classified	Hourly	\$24.09	0.00%	\$0.75	\$0.00	\$24.84	\$10,019.94	\$61,679.65
Q N00001004	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											
Q S0001717	President		Unclassified	Salary	\$421,898.00	0.00%	\$15,000.00	\$15,000.00	\$451,898.00	\$84,379.60	\$536,277.60
Q S000187	Associate Vice President		Unclassified	Salary	\$113,488.01	3.00%	\$500.00	\$0.00	\$117,392.65	\$22,697.60	\$140,090.26
Q S198198	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
Q \$000340	Planning Specialist		Unclassified	Salary	\$100,000.00	5.00%	\$5,000.00	\$0.00	\$110,000.00	\$20,000.00	\$130,000.00
Q \$030394	Senior Executive Assistant		Unclassified	Salary	\$71,255.60	5.00%	\$3,000.00	\$0.00	\$77,818.38	\$14,251.12	\$92,069.50
Q \$000472	Special Assistant to the President	ф	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 after making an edit

Once the save button has been used to save changes to the database, the report updates to display the latest data from the database. The background color of the edited cell reverts back to blue, because now it is showing the queried value from the database.

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de	<sup>10</sup> pt000010   I	Labor Pla	nning											
	OVERVIEW	POSITION	PLANNING	DISTRIBUTIC	IN SUMMAR	RY O	THER LABOR	SUMMARY						
										Adjustments	3			
	Position II	D	Desc	ription	Note	Bargaining Unit	t Pay Type	Current Base Pay	Adj. %	Adj. \$	Other Adj.	Proposed Base Pay	Merit	Proposed Salary
	Staff Non Exempt													
	Q H0001798		Executive Assista	ant		Classified	Hourly	\$24.09	0.00%	\$0.75	\$0.00	\$24.84	\$10,019.94	\$61,679.65
	Q N00001004		Open Part Time (	Office Assistant		Classified	Salary	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Total Staff Non Exe	empt												
	Staff Exempt													
	Q S0001717		President			Unclassified	Salary	\$421,898.00	0.00%	\$15,000.00	\$15,000.00	\$451,898.00	\$84,379.60	\$536,277.60
	Q S000187		Associate Vice P	resident		Unclassified	Salary	\$113,488.01	3.00%	\$500.00	\$0.00	\$117,392.65	\$22,697.60	\$140,090.26
	<b>Q</b> S198198		Assistant to the P Planning	President for	▲	Unclassified	Salary	\$50,445.38	10.00%	\$500.00	\$0.00	\$55,989.91	\$10,089.08	\$66,078.99
	Q S000340		Planning Special	ist		Unclassified	Salary	\$100,000.00	5.00%	\$5,000.00	\$0.00	\$110,000.00	\$20,000.00	\$130,000.00
	Q S030394		Senior Executive	Assistant		Unclassified	Salary	\$71,255.60	5.00%	\$3,000.00	\$0.00	\$77,818.38	\$14,251.12	\$92,069.50
	Q S000472		Special Assistant	t to the President	di.	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 after saving edits

### Overview of limitations and requirements

The ability to edit and save data from a Fixed Report component is intended to meet a fairly narrow use case. You can query data from the database, edit values in designated columns, and then save the edited values and/or save calculated values which reference the edited values. Generally speaking, it is not possible to provide additional edit controls like drop-down lists of values, and it is not supported to create new records within the report.

The edit and save functionality is only supported for relatively simple report configurations. For additional information on limitations, see the following topic in Axiom Software Help: *Editing and saving data using a Fixed Report* (AX1086).

### How the report save works

When the Fixed Report component is rendered in the form, any columns that are configured as editable display with their values in editable cells. For consistency, these cells use the same formatting as other editable form components, such as the Text Box component or editable cells in a Formatted Grid component. The editable cells are outlined and have a light blue background.

To edit a cell value, the user can click into the cell and then type. When the user clicks or tabs out of the cell after editing the value, the cell now displays with a light yellow background. This is intended as a signal to the user that the value has been changed, but has not yet been saved.

When the user triggers a save-to-database in the form, any edited rows in the grid are saved to the database, using the target table and columns as configured in the FixedReportColumns data source. Unlike standard form saves, the fixed report save is performed at the start of the form update cycle, before any other form processing begins. If the form contains an Axiom query that references the target table of the fixed report save, the updated data is available to the query.

The Fixed Report component is refreshed at the end of the form update cycle, so that it displays the most current data from the database. Any cells in the report that were previously formatted as changed are now restored to their original formatting.

For additional information on design considerations, see the following topic in Axiom Software Help: *Editing and saving data using a Fixed Report* (AX1086).

## Additional Axiom form enhancements

- Formatting updates
  - The tabular version of the Menu component was updated so that the selected tab is now blue, and the other tabs use a darker gray color. This change makes it easier to tell which tab is selected.

GENERAL	CAPITAL	FINANCIAL		
Setup Templa	tes Picklists			
General S File Group: Capi	Setup tal Requests			
System-Wide Pa	rameters		Summary and Pro Forma Financial Setup	
Discount Rate for Sales Tax Rate Capital Expenditu Use Leap Year Ca Default GL Accou	NPV re Cash Flows Iculations? nt	10.0% 0.0% Beginning of the Year No 17500	Depreciation Default - Pro Forma Fin Inputs       1/2 Year Depreciation         Depreciation Default - Summary Fin Inputs       1/2 Year Depreciation <ul> <li>Enable Funding Sources - Pro Forma Fin Inputs</li> <li>Fnable Funding Sources - Summary Fin Inputs</li> <li>No</li> </ul> <ul> <li>Use BalSheet worksheet for Pro Forma?</li> <li>Yes</li> </ul>	

Example Menu component showing color changes

• The hyperlink color used in Axiom Software web pages and Axiom forms was changed to a shade of blue with higher contrast, to meet accessibility guidelines.

#### Use icons in a Data Grid component to open a URL stored in a table column

Data Grid components have been enhanced so that you can now store fully-qualified URLs in a table column, and then use the {value} variable to launch the URLs via an icon in the grid. To do this, configure the grid as follows:

- Set up a [Column] row in the DataGridColumns data source for the table column that holds the URLs, and configure this column as follows:
  - Enter the name of an IconConfig data source in the [Icon] property.
  - Set the new property [HideValue] to True. This will cause the column to only show the icon, and hide the URL value.
- Create an IconConfig data source, and set up an [Icon] row for the icon that you want to display. Configure this icon row as follows:
  - Set the [Action] property to {value}.
  - Set the new property [ForceHyperlink] to True. This will cause the grid to treat the column value as a hyperlink.

When the grid is rendered in the form, the column will display the icons, and users can click the icons to launch the URLs as defined in the table column.

If you create a new DataGridColumns or IconConfig data source using the right-click wizard, the wizard will automatically add the new properties. If you want to use existing data sources, then you can manually add the new tags.

# File groups

This section details the new features and enhancements made to file groups.

## Control how tables are cloned when creating file group scenarios

The existing file group scenario feature provides a way to automatically create a copy of a file group for purposes of performing "what-if" style analysis. When you create a file group scenario, certain associated tables are cloned so that these tables can hold the data for the scenario. You can now explicitly control which tables are cloned when creating a scenario, as well as the level of cloning (just table structure, or table structure and data). This expands the usefulness of the file group scenario feature, so that it applies to a wider variety of file group designs.

### Why was this change made?

In previous releases, tables were created as follows when creating a file group scenario (based on table variables where **Allow file group to save data to this table** is enabled):

- If a table variable resolved to a reference table, the table structure and data was cloned to create the scenario table.
- If a table variable resolved to a data table, the table structure was cloned to create the scenario table. Data was not copied.

This automatic behavior covered only a certain type of file group design. Other file group designs required the data in some data tables to be copied, or required some reference tables not to be copied. Although limited customizations could be made when creating the scenario, the customization process was not intuitive and some customizations could not be made (such as copying data for a data table). This meant that some file groups could not effectively leverage the file group scenarios feature.

To address this issue, we have introduced the ability to configure the table cloning behavior for table variables. By default, table variables use the same table cloning behavior as in previous versions when creating a scenario—so if the old behavior worked for a particular file group, it will continue to work. However, if the default behavior is not applicable to a particular file group, you can now "override" this behavior per table variable, and specify exactly how the table variable should be handled when creating a scenario.

### Configuring table variables for scenario creation

Table variables in file groups have a new option of **Scenario Cloning Behavior** to control what happens to the table when creating a file group scenario.

- By default, all table variables that are eligible to be cloned when creating a scenario display **Automatic** as the scenario cloning behavior. This means that the tables will be cloned using the default cloning behavior (as described in the previous section).
- Table variables where the scenario cloning behavior does not apply display N/A as the scenario cloning behavior. For example, this applies to table variables that resolve to document reference tables, or table variables where Allow file group to save data to this table is not enabled.

After upgrading, your existing table variables in a file group might look something like the following screenshot. If you create a file group scenario at this point, the table cloning behavior is the same as in previous versions. If this existing behavior works for your file group, then no changes are necessary and you can continue to create scenarios.

Edit properties for File Group 'Budget 2022'.         Group       Options       Variables       Display Columns       Web Configuration       Triggers         Group       Options       Variables       Display Columns       Web Configuration       Triggers         Group       Table Variables       Picklist Variables       Picklist Variables       Picklist Variables         Table variables can be built using existing file group variables and are accessed the same way using GetFileGroupVariable. In addition, you can restrict saving data from this file group to only the tables defined in this list.       New       Picklist Voiew       View         Restrict saves to tables       Variable Value       Classification       Resolved Table Name       Allow Saves       Scenario Cloning Behavior         Assumptions       (ShortFGName)_Assumptions       Reference       BGT22_Assumptions       True       Automatic         Setup       (ShortFGName)_Setup       Reference       BGT22_Setup       True       Automatic         PlanData       BGT(FileGroupYear)       Data       BGT2021       True       Automatic         PlanCodeTable       Dept       Reference       DEPT       True       Automatic         PlanCodeTable       Dept       Reference       DEPT       True       Automatic         2LYActualData </th <th>dit File Group</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>?</th>	dit File Group						?				
e Group Options Variables Display Columns Web Configuration Triggers   Table Variables   Table Variables Table Variables Picklist Variables   Table variables can be built using existing file group variables and are accessed the same way using GetFileGroupVariable. In addition, you can restrict saving data from this file group to only the tables defined in this list.   Restrict saves to tables Variable Value Classification Resolved Table Name Allow Saves Scenario Cloning Behavior   Assumptions (ShortFGName)_Assumptions Reference BGT22_Assumptions True Automatic   Setup (ShortFGName)_Setup Reference BGT22_Setup True Automatic   PlanData BGT(CurrentFY) Data BGT2021 True Automatic   PlanCodeTable Dept Reference DEPT True Automatic   2!YActualData GL2YearsAgoFY) Data GL2019 False N/A   L'YActualData GL{LastFY} Data GL2020 False N/A	Edit properties for File Group 'Budget 2022'.										
Beneral Variables Table Variables Picklist Variables   Table variables can be built using existing file group variables and are accessed the same way using GetFileGroupVariable. In addition, you can restrict saving data from this file group to only the tables defined in this list. Restrict saves to table variable Value Variable Name Variable Value Classification Reference <	Group Options Var	iables Display Columns Web	Configuration Trig	ggers							
Table variables can be built using existing file group variables and are accessed the same way using Gebrup variables. New Edit New Edit New Variable View   Variable Name Variable Value Classification Resolved Table Name Allow Saves Scenario Cloning Behavior   Assumptions (ShortFGName)_Assumptions Reference BGT22_Assumptions True Automatic Image: Comparison of the table set of table set	eneral Variables Tabl	e Variables Picklist Variables									
Mew / Edit × Delete View / Ed	Table variables can be	built using existing file group var	iables and are acce	essed the same way using Get	FileGroupVariab	le. In addition, you can restric	t saving:				
Variable NameVariable ValueClassificationResolved Table NameAllow SavesScenario Cloning BehaviorAssumptions(ShortFGName)_AssumptionsReferenceIBGT22_AssumptionsTrueAutomaticSetup(ShortFGName)_SetupReferenceIBGT22_SetupTrueAutomaticCYPlanDataBGT{CurrentFY}DataIBGT2021TrueAutomaticPlanCodeTableDeptDataIBGT2022TrueAutomatic2LYActualDataGL{2YearsAgoFY}DataIGL2019TrueAutomaticLYActualDataGL{LastFYDataIGL2020FalseN/ACYActualDataGL{CurrentFY}DataIGL2021FalseN/A	data from this file grou Restrict saves to tal	ip to only the tables defined in th ples defined below	is list.		+ New	v 🥒 Edit 🗙 Delete 🛛 V	iew 🔻				
Assumptions{ShortFGName}_AssumptionsReferenceBGT22_AssumptionsTrueAutomaticSetup{ShortFGName}_SetupReferenceBGT22_SetupTrueAutomaticCYPlanDataBGT{CurrentFY}DataBGT2021TrueAutomaticPlanDataBGT{FileGroupYear}DataBGT2022TrueAutomaticPlanCodeTableDeptReferenceDEPTTrueAutomatic2LYActualDataGL{2YearsAgoFY}DataGL2019FalseN/ACYActualDataGL{currentFY}DataGL2020FalseN/A	Variable Name	Variable Value	Classification	Resolved Table Name	Allow Saves	Scenario Cloning Behavior					
Setup[ShortFGName]_SetupReferenceImage: BGT22_SetupTrueAutomaticCYPlanDataBGT{CurrentFY}DataBGT2021TrueAutomaticPlanDataBGT{FileGroupYear}DataBGT2022TrueAutomaticPlanCodeTableDeptReferenceDEPTTrueAutomatic2LYActualDataGL{2YearsAgoFY}DataGL2020FalseN/ALYActualDataGL{urrentFY}DataGL2021FalseN/A	Assumptions	{ShortFGName}_Assumptions	Reference	BGT22_Assumptions	True	Automatic					
CYPlanDataBGT{CurrentFY}DataBGT2021TrueAutomaticPlanDataBGT{FileGroupYear}DataBGT2022TrueAutomaticPlanCodeTableOptReferenceDEPTTrueAutomatic2LYActualDataGL{2YearsAgoFY}DataGL2020FalseN/ALYActualDataGL(stFY)DataGL2020FalseN/ACYActualDataGL{CurrentFY}DataGL2021FalseN/A	Setup	{ShortFGName}_Setup	Reference		True	Automatic					
PlanDataBGT(FileGroupYear)DataBGT2022TrueAutomaticPlanCodeTableDeptReferenceDEPTTrueAutomatic2LYActualDataGL{2YarsAgoFY}DataGL2019FalseN/ALYActualDataGL{LasFY}DataGL2020FalseN/ACYActualDataGL{CurrentFY}DataGL2021FalseN/A	CYPlanData	BGT{CurrentFY}	Data	BGT2021	True	Automatic					
PlanCodeTable         Dept         Reference         True         Automatic           2LYActualData         GL(2YearsAgoFY)         Data         GL2019         False         N/A           LYActualData         GL{LastFY}         Data         GL2020         False         N/A           CYActualData         GL{CurrentFY}         Data         GL2021         False         N/A	PlanData	BGT{FileGroupYear}	Data	BGT2022	True	Automatic					
2LYActualData         GL{2YearsAgoFY}         Data         GL2019         False         N/A           LYActualData         GL{LastFY}         Data         GL2020         False         N/A           CYActualData         GL{CurrentFY}         Data         GL2021         False         N/A	PlanCodeTable	Dept	Reference	- DEPT	True	Automatic					
LYActualData         GL{LastFY}         Data         GL2020         False         N/A           CYActualData         GL{CurrentFY}         Data         GL2021         False         N/A	2LYActualData	GL{2YearsAgoFY}	Data	🔟 GL2019	False	N/A					
CYActualData GL{CurrentFY} Data GL2021 False N/A	LYActualData	GL{LastFY}	Data	🔟 GL2020	False	N/A					
	CYActualData	GL{CurrentFY}	Data	🛄 GL2021	False	N/A					
						Apply OK	Can				

Example table variables using the default cloning behavior

Going forward, you now have the option to override the scenario cloning behavior on a per table variable basis. For example, you may want to override the cloning behavior for the following reasons:

• If the plan code table of the file group is the target of a table variable, then that table should not be cloned for the scenario. All scenarios for a file group must use the same plan code table.

- If the file group has table variables for other dimension reference tables besides the plan code table, these tables probably should not be cloned for the scenario. For example, if a table variable references an Entity table or an Account table, there is likely no need to create a copy of this table for the scenario.
- If the plan files in the file group are rebuildable—either virtual plan files, or persistent plan files designed as rebuildable—then tables that hold planning data should copy data as well as structure. Otherwise, any planning inputs made in the original file group and saved to the planning tables will not be available to the scenario.

To configure a table variable to override the default scenario cloning behavior, double-click the variable to open it for editing, then enable **Override Scenario Cloning Behavior**. You can then select one of the following options for the behavior:

- **Ignore**: The table is not cloned when creating a scenario. The scenario will continue to use the same table as the original file group.
- **Structure**: The table is cloned when creating a scenario, but only the structure is copied, not the data. Essentially, the table is empty until data is saved to it from the scenario.
- **Structure and Data**: The table is fully cloned when creating a scenario—both structure and data. This means that the scenario starts with the same data as the original file group.

A Edit Table Variable		×
Variable Name PlanCodeTable Resolved Table Name DEPT	3	
Variable Value	Inser	t variable 🕶
Dept		
✓ Allow file group to save dat	a to this table	
✓ Override Scenario Cloning E	Behavior	
Scenario Cloning Behavior	Ignore 🖌	
	Ignore	Cancel
	Structure Only	Cancer
	Structure and Data	

New option to override the scenario cloning behavior

In the following example, the table variables have been configured so that the plan code table will not be cloned, and so that the planning data tables will clone both the table structure and data.

Group Options Var eneral Variables Tabl able variables can be lata from this file grou	Display Columns     Web       e Variables     Picklist Variables       built using existing file group varup to only the tables defined in the second seco	Configuration Tric	ggers ssed the same way using Get	FileGroupVariab	le. In addition, you can restrict savin
Restrict saves to tal	oles defined below			🕈 New	🖉 Edit 🗙 Delete 🛛 View 🕶
Variable Name	Variable Value	Classification	Resolved Table Name	Allow Saves	Scenario Cloning Behavior
Assumptions	{ShortFGName}_Assumptions	Reference	BGT22_Assumptions	True	Automatic
Setup	{ShortFGName}_Setup	Reference	BGT22_Setup	True	Automatic
CYPlanData	BGT{CurrentFY}	Data	BGT2021	True	Structure and Data
PlanData	BGT{FileGroupYear}	Data	III BGT2022	True	Structure and Data
PlanCodeTable	Dept	Reference	DEPT	True	Ignore
2LYActualData	GL{2YearsAgoFY}	Data	🔲 GL2019	False	N/A
LYActualData	GL{LastFY}	Data	📰 GL2020	False	N/A
CYActualData	GL{CurrentFY}	Data	💷 GL2021	False	N/A

Example table variables where the default cloning behavior has been overridden

### Related changes to the scenario creation process

When you create a file group scenario, the variables screen of the wizard has been updated to only display the general file group variables. The table variables and picklist variables no longer display.

- The general variables continue to be shown so that you can edit them for the scenario if needed. For example, if you are storing an escalator value as a general file group variable, then you can change the value for the scenario, just like in previous versions.
- In previous versions, the table variables were shown so that you could optionally edit a table variable name and prevent a particular table from being cloned for the scenario. However, this is no longer necessary, because if you do not want a table to be cloned, then you can override the scenario cloning behavior for the table variable and set it to **Ignore**. Therefore, these variables no longer display. Scenario tables will be created based on the scenario cloning behavior defined for the table variables.

**NOTE:** The names of scenario tables are still determined by appending the scenario **Table Suffix** to the current table name. For example, if the current table name is BGT2021 and the table suffix is \_V1, the scenario table is named BGT2021\_V1. The table suffix is defined on the first screen of the scenario wizard just like in previous versions. • In previous versions, picklist variables had unintended behavior when creating a scenario. Although picklist variables are considered as "read only" for save-to-database purposes (meaning it is not enabled to save data to the picklist table from the file group), the target tables of picklist variables were always cloned when creating a scenario. This inconsistent behavior has been corrected, and picklist variables are now ignored when creating a scenario. Since there is no useful action to perform on picklist variables when creating a scenario, the picklist variables also no longer display in the wizard.

eneral Variables Aodify any file group variab	les (if necessary) that should be diffe	erent in the new scenario.		
Variable Name	Variable Value	Resolved Value	Original Value	Variable Type
2YearsAgoFY	{FileGroupYearMinus3}	2019	2019	String
CurrentFY	{FileGroupYearMinus1}	2021	2021	String
LastFY	{FileGroupYearMinus2}	2020	2020	String
NextYear	{FileGroupYearPlus1}	2023	2023	String
PayrollEscalator	.08	0.08	0.08	Number
ShortFGName	BGT{ShortFileGroupYear}	BGT22	BGT22	String

Variables screen of the Create Scenario wizard, showing just the general file group variables

One additional change was made that affects table variables in a scenario file group. The table variable property **Allow file group to save data to this table** can only be edited if the table variable points to a scenario table. In other words, you cannot edit a table variable in a scenario to allow saving data if the target table was not created for the scenario.

## Command to create file group scenarios

Using the new Create File Group Scenario command, you can now create scenarios from custom task panes or ribbon tabs, or schedule the scenario creation for server-side processing via Scheduler. This command provides greater flexibility to control the presentation and timing of scenario creation.

The new command works just like the option on the file group menu to create a scenario for the file group. When setting up the command, you specify the following:

- The file group for which to create a scenario
- The name of the scenario

- The table suffix to apply to scenario tables
- Optional values for file group variables to apply to the scenario (such as variables that define driver values to change in the scenario)

Choose Sh Shortcut Target	ortcut	
command://Creat	FileGroupScenario	🗙
Shortcut Paramete	rs	
File Group	Current Budget	<b></b>
Scenario Name	V1	
Table Suffix	_V1	
File Group Variabl	25	+
PayrollEsc	.05	×

Example command to create a file group scenario

When using the command in a custom task pane or ribbon tab, you can optionally leave the scenario name blank to open the Create Scenario dialog. If the scenario name is specified in the command, then the dialog does not display and the scenario creation starts automatically when the command is used.

To use the command in Scheduler, add an **Execute Command Adapter** task to the job and then configure it to run the Create File Group Scenario command. When the job is run, the scenario is created using server-side processing, which is preferable if the scenario creation involves creating a lot of tables. Scheduler job variables can also be used to set values for the scenario name, table suffix, and file group variables.

Scheduled Jobs 📑 FG Scenario		
General Variables Scheduling Rules Event Handlers Notification Tasks Execute Command Adapter Results	<ul> <li>Task Control</li> <li>Task Details Command Name command://CreateFileGroupScenario</li> </ul>	Edit Command

Example Scheduler job to create a scenario

For example, you could create an Axiom form that gathers user inputs such as the scenario name, table suffix, and key drivers to change for the scenario. The form could use a RunEvent command to trigger a Scheduler job to create the scenario, and pass in the user inputs from the form to the Scheduler job variables. The scenario is created using server-side processing, so the current user can move on to other tasks instead of waiting for a potentially lengthy and resource-intensive process to complete.

## Scheduler jobs as file group utilities

You can now store Scheduler jobs in the Utilities folder of a file group, so that these jobs are associated with the file group and can be configured to perform actions on the current file group. When a file group is cloned to create a new file group or scenario, the Scheduler jobs in the Utilities folder are copied along with the other utilities and will automatically point to the new file group.

**NOTE:** Currently it is not possible to directly save a Scheduler job to a file group Utilities folder when creating the job. You must first create the job and save it to the Scheduler Jobs Library, then use Axiom Explorer to copy the file to the file group Utilities folder. You can also export the job and then import it into the Utilities folder.

## Configuring a Scheduler job to use the current file group

If a Scheduler job is stored in a file group Utilities folder, the following task types can be configured as relative to the current file group. This is the recommended way to configure the tasks, so that the tasks will automatically reference the current file group when the file group is cloned.

Task	Notes
Create Plan Files	When selecting the file group for the task, you can optionally select <b>Use Current</b> File Group instead of selecting a specific file group or alias.
File Processing	When selecting the file to process for the task, you can optionally select a report utility file underneath the <b>Current File Group</b> node at the top of the file groups list. If you do this, the path to the file is stored relative to the current file group.
Process Plan Files	When selecting the file group for the task, you can optionally select <b>Use Current</b> File Group instead of selecting a specific file group or alias.
Start Process	When selecting the process definition file for the task, you can optionally select a plan file process in the <b>Current File Group</b> node at the top of the file groups list. If you do this, the path to the file is stored relative to the current file group.

In the following example, a Scheduler job is stored in a file group Utilities folder. The Scheduler job is configured to **Use Current File Group**, which is currently Budget 2022. If this file group is cloned to create a new year of budgeting, or if a file group scenario is created for the file group, this Scheduler job will be copied with the other utilities and it will automatically point to its new current file group.



Example Scheduler job as a file group utility, configured to use the current file group

## Using event handlers to trigger events specific to a file group

When a Scheduler job with an active event handler is stored in a file group Utilities folder, the event handler becomes specific to the file group. The **Event Handlers** tab in Scheduler displays the name of the associated file group next to the event handler name. If the file group and its utilities are cloned using any process—such as regular file group clone, create scenario, or file group rollover—then the event handler is copied for use in the new file group. If a file group and its utilities are deleted, the associated event handler will also be deleted.

Axiom Scheduler -	Event Handlers			
Job Service				
Scheduled Event F	Remote Data Results Servers	Refresh		
Se	rvice View	Actions		
Scheduled Jobs	Event Handlers			
	Event Name		Job	
FGUtility (Capital Plar	nning V1)		fg_utility	
FGUtility (Capital Req	uests 2020)		fg_utility	
FGUtility (Capital Req	uests 2021)		fg_utility	
Override				
overnide			Override FP	
Package Update Com	plete		Override FP File Processing	
Package Update Com System.ApplyUserTab	plete leConstraints		Override FP File Processing System.ApplyUserTableConstraints	

Example event handlers associated with a file group

The RunEvent command can be configured to target event handlers stored in a specific file group. If a file group context is specified, then Axiom Software looks for the event handler name in that file group and in the general Scheduler Jobs Library, but not in any other file groups.

A Shortcut Proper	ties ×
Choose Sho	ortcut
Shortcut Target	
command://RunEv	rent X
Shortcut Paramete	rs
Event Name	FGUtility
Result Message	
File Group	Use Current File Group (Capital Requests 2021) 🧀 🗙
Processing Step	Form - After Updating Values 🗡
Event Variables	+
CapReq	[Variables!K24]
	OK Cancel

Example RunEvent command to trigger an event within a file group

## Additional file group enhancements

Use Scheduler to process plan files in scenario file groups

The **Process Plan Files** task in Scheduler can now be used to process scenario file groups. Previously, scenario file groups could not be processed by this task, so all processing for scenarios had to be done manually in the Desktop Client.

When selecting the file group for the Process Plan Files task, you can now select the **Show Scenarios** option to display scenarios in the list of file groups.



New option to show and select scenarios for the Process Plan Files task

**NOTE:** This enhancement was originally delivered in a 2020.1 patch. However, it is included in the *What's New* for 2020.2 because this release provides the official rollout of the enhancement.

Also, now that Scheduler jobs can be stored as file group utilities and configured as relative to the current file group, these utilities will be copied when creating a scenario and can also be used to process plan files in the scenario.

# Plan file processes

This section details the new features and enhancements made to plan file processes.

## Group tasks in the Process task pane

You can now optionally display process tasks in groups within the Process task pane. This feature 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. Groupings can be defined on a per step basis, so that each step can use a different grouping or no grouping as needed.

**NOTE:** This enhancement was originally delivered in a 2020.1 patch. However, it is included in the *What's New* for 2020.2 because this release provides the official rollout of the enhancement.

To configure a process step to display its tasks in groupings, use the **Grouping Column** option in the step properties of the plan file process definition:

A Edit Plan File Process		? ×
Edit the definition of plan file	process 'Grouped Steps' in File Group 'Budget 2021'.	
1 This process is currently active. Change	s made will affect the active process and some types of changes will not be allowed.	View status details
Process Properties Process Steps Notifica	tions Web Configuration Advanced Properties	
🕈 Add 👻 🗈 Duplicate 🔀 Delete	▲ This step is active in the currently running process.	
Edit Step	Step Properties Assignments Step Notifications	
Multiple Approvals Step	🔛 Edit Plan File Step	<u>^</u>
	Display Text Edit Step	
	Description	
	Show step as rejection choice for user selects rejection behavior	
	Process Step Configuration	
	Save and validate plan file before advancing to next step	
	Open forms-enabled plan files as Form in the client V	
	Display Settings for Process Task Pane	
		~
	Арріу ОК	Cancel

Option to display process tasks for a step in groupings

When the Grouping Column option is used, process tasks for the step display in expandable/collapsible groupings in the Process task pane, based on the values in the specified grouping column. For example, if the grouping column is Dept.Region, the tasks display in groups such as US West, US East, and so on. In the following example, the first step shown in the task pane is grouped by regions, and the second step is grouped by vice presidents.



Example Process task pane with grouped tasks

The task owner can use these groupings to quickly find and review the tasks that they want to complete. If you want to complete all tasks for a particular grouping, you can right-click the grouping name and choose a process action. The **Process Action** dialog is automatically filtered to only show tasks for the current grouping. You can click **Select All** in this dialog to select and complete all of the tasks for the grouping.

**NOTE:** The grouping column for a step only impacts the display of the Process task pane in the Desktop Client, or a custom task pane that uses the **User Process View** command. Tasks do not display in groupings in other process dialogs or pages.

## Enhancements to copy plan files action for plan file processes

In version 2020.1, a new feature was introduced to automatically copy plan files from one file group to another when completing a process task in a plan file process. This feature has been further enhanced so that the copy plan files action can now be used on any type of step, and to automatically start the copied plan file in a process within the target file group.

**NOTE:** These enhancements were originally delivered in a 2020.1 patch. However, they are included in the *What's New* for 2020.2 because this release provides the official rollout of the enhancements.

The copy plan files feature for plan file processes is only available if you enable the following system configuration setting for your installation: **ShowCopyPlanfilesActionInProcess**. Otherwise, the feature is hidden by default.

### Copy plan files action for edit steps

Previously, the copy plan files action was only available on approval steps. It is now available on edit steps as well, so that you can enable the option on any step as needed.

A Edit Plan File Process		?	×
Edit the definition of plan file process 'C	Copy Source' in File Group 'Budget 2021'.		
1 This process is currently active. Changes made wi	I affect the active process and some types of changes will not be allowed.	View status o	<u>details</u>
Process Properties Process Steps Notifications We	b Configuration Advanced Properties		
💠 Add 🗸 🖹 Duplicate 🗙 Delete	1 This step is active in the currently running process.		
Edit Step	Step Properties Assignments Step Notifications		
Gamma Multiple Approvals Step	📝 Edit Plan File Step		^
	Display Text Edit Step Description		
	Show step as rejection choice for user selects rejection behavior		
	Process Step Configuration         Save and validate plan file before advancing to next step         Open forms-enabled plan files as         Form in the client ×		
	Copy Plan File Settings ✓ Enable plan file copy to target file group Target File Group: Budget 2022 Target ✓ ✓ Process and save the plan file after copying		
	Apply OI	K Car	ncel

Copy plan files action now available on edit steps

### Starting copied plan files in a target process

If you want the copied plan files to progress through a process in the target file group, the copy plan files action can now automatically start the plan files in this process. To do this, the process in the target file group should be configured as follows:

1. On the Advanced tab of the plan file process definition, enable the option Treat as copy plan files

**target process**. When this option is enabled, plan files are not started in the process when the overall process is started. Instead, the plan files will be started in the process when they are copied from the source file group.

A Edit Plan File Process	?	$\times$
Edit the definition of plan file process 'Target ' in File Group 'Budget 2022 Target'.		
This process is currently inactive.	<u>Start p</u>	ocess
Process Properties Process Steps Notifications Web Configuration Advanced Properties		
Process Grouping Options         Specifying a grouping column allows management of process functions at the group level.         Im       Grouping Column         Vou can assign process group owners by specifying an owner column in a grouping table         Im       Group Owner Column         Process Filter Options         Specify a filter if you want this process to act on a subset of the full plan file list         Process Filter         Process Start Options         Image: Treat as Copy Plan File Target Process		
Арріу ОК	Car	icel

- 2. The process must be the designated **Plan File Process** for the target file group, in the file group properties. This identifies the process to start plan files in when the plan files are copied.
- 3. Start this process before any plan files will be copied from the source file group to the target file group, so that the process is active and ready to deal with copied plan files.

# Security

This section details the new features and enhancements made to security.

## Assign users to roles and subsystems using 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, without all of the overhead of the full Security Management dialog.

The web Security Manager is accessible in the System Administration area of the Web Client, under Tools > Security Manager. You can also navigate to the page directly as follows: <YourAxiomURL>/ax/securitymanager.

System Administration	
=	
Navigation	-
Home	
Dashboard	
✓ Tools	
Table Manager	
Forms Explorer	
Custom Help Admin	
Save Lock Administration	
Scheduler	
Security Manager	
> Auditing	

The page contains a searchable and filterable list of users in your system. Once you have selected a user, you can use the right-hand pane to assign the user to roles and subsystems.

- Use the **Global Role Assignments** section to add the user to global roles. Global roles are roles that are not associated with a subsystem.
- Use the **Subsystem Assignments** section to add the user to subsystems, and to roles within the assigned subsystems.

**NOTE:** If security subsystems are not enabled in your system, then the Subsystem Assignments section and the subsystem filter are not present. Additionally, the word "global" is removed from the Role Assignments section.

System Administration			🗰 🛷 🗘 🚥	AXIO
=				* 1
Security Manager		Save 💿 Adams, Cla	ırk	
Show Enabled Users Only	Subsystem Show All	GLOBAL ROLE ASSIGNM	MENTS	
User	Email	Administrators		Ŵ
Adams, Clark	cadams@company.com	+ Add User To Globa	I Role	
Banion, Brock	bbanion@company.com	SUBSYSTEM ASSIGNM	ENTS ROLES	
Doe, Jane	jdoe@company.com	Budgeting	- Dudget Admin	
Doh, John	jdoh@company.com	buugeting	Budget Admin	<i>I</i> U
Eubanks, Bill	beubanks@company.com	Capital Planning	Capital Planning Admin	Ø 🖞
Frank, Olga	ofrank@company.com	+ Add User to Subsy	stem	
Hunter, Wendy	whunter@company.com			
Lloyd, Jodie	jlloyd@company.com			
Sandstone, Ron	rsandstone@company.com			
Summers, Brie	bsummers@company.com	<b>.</b>		
<b>■ ■ 1</b> 2 3 4 5 6 7	8 9 10 ▶ ₩	1 - 100 of 2490 items		

New web Security Manager page

For example, to assign a user to a subsystem, click **Add User to Subsystem**, then select one or more subsystems.

System Administration		III 🕫 🗘 🗔	AXIOM
=			★ ?
Security Manager		Save   Adams, Clark	
Show Enabled Users Only	Subsystem Show Al Add To Subsytem	× ROLE ASSIGNMENTS	
User	Email Budgeting	histrators	ŵ
Adams, Clark	cadams@c Capital Planning	Jser To Global Role	
Banion, Brock	bbanion@c DForecasting	TEM ASSIGNMENTS ROLES	
Doe, Jane	jdoe@com	oesn't belong to any subsystems.	
Doh, John	jdoh@com	Jser to Subsystem	
Eubanks, Bill	beubanks@		
Frank, Olga	ofrank@co		
Hunter, Wendy	whunter@c OK	Close	
Lloyd, Jodie	jlloyd@company.com		
Sandstone, Ron	rsandstone@company.com		
Summers, Brie	bsummers@company.com		
⊌ ∢ 1 2 3 4 5 6 7 8	9 10 ▶ ₩	1 - 100 of 2490 items	

Once a user belongs to a subsystem, click the pencil icon next to the subsystem name to add the user to one or more roles in the subsystem (or to remove the user from a subsystem role).

System Administration					🗰 🥝 🗘 💽	AXIOM
=						* ?
Security Manager			Save	Adams, Clark		
Show Enabled Users Only	Subsystem Show Al	Manage Subsystem Roles				
User	Email	Budget Admin		nistrators		Û
Adams, Clark	cadams@c	Budget Managers		Jser To Global Role		
Banion, Brock	bbanion@c	Budget Process		TEM ASSIGNMENTS	ROLES	
Doe, Jane	jdoe@comj	Budget Viewer		eting	No roles have been assigned.	1 Ĥ
Doh, John	jdoh@comj			-	,	
Eubanks, Bill	beubanks@			al Planning	No roles have been assigned.	I 🗇
Frank, Olga	ofrank@co			Jser to Subsystem		
Hunter, Wendy	whunter@c	ОК	Close			
Lloyd, Jodie	jlloyd@comp	bany.com				
Sandstone, Ron	rsandstone@	company.com				
Summers, Brie	bsummers@	company.com	•			
⊌ ∢ 1 2 3 4 5 6 7 8 9 10	▶ ₩		1 - 100 of 2490 items			

To remove the user from a global role or a subsystem, click the trash icon next to the global role or subsystem name. When a user is removed from a subsystem they are also automatically removed from any roles in that subsystem.

Like other security management features, the web Security Manager is available to administrators, subsystem administrators, and users with the Administer Security permission. For subsystem administrators, the page is automatically filtered to only show users that belong to the subsystem.

Currently, the functionality of the web Security Manager is limited to managing role and subsystem assignments for users. If you need to create new users, roles, or subsystems, or if you need to manage security permissions, this full functionality remains available in the Desktop Client.

# Additional enhancements

Option to skip updating existing records during an import

Imports have a new option to skip updating existing records, so that only new records are added when the import is run. This option is located on the **General** tab of the import wizard, and is named **Bypass updating existing rows when saving to the destination table**. This option is disabled by default, so that existing imports will continue to both update and add records.

A Import transactions	?	$\times$
General Source Variables Mapping Transforms Execute		
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<ul> <li>Ignore lookup and key errors</li> <li>Repare updating existing rows when saving to the destination table</li> </ul>		
y bypass updating existing rows when saving to the destination table		
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Save As Apply OK	Car	ncel

Enabling this option may improve import performance for use cases where the import source is not expected to contain updates to existing data. Keep in mind that if you enable the option and the import source does contain updates to existing data, the updates are simply ignored with no warning.

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