

Release Notes

Axiom

Version 2020.3

The logo for AXIOM, featuring the word "AXIOM" in a bold, white, sans-serif font. The text is enclosed within a thin, light blue rectangular border that is slightly offset from the text, creating a subtle frame effect.

AXIOM

Contents

- About the release notes 2
- New features and enhancements 3
- What to know before upgrading 9
 - Upgrade considerations 9
 - Installation and technical changes 11
- Preparing and scheduling upgrades 13
- Getting help and training 14
- Issues fixed in 2020.3 15
- Appendix: Version 2020.3 Patches 16

About the release notes

Syntellis is pleased to announce the release of **Axiom Version 2020.3**. Each release of Axiom 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

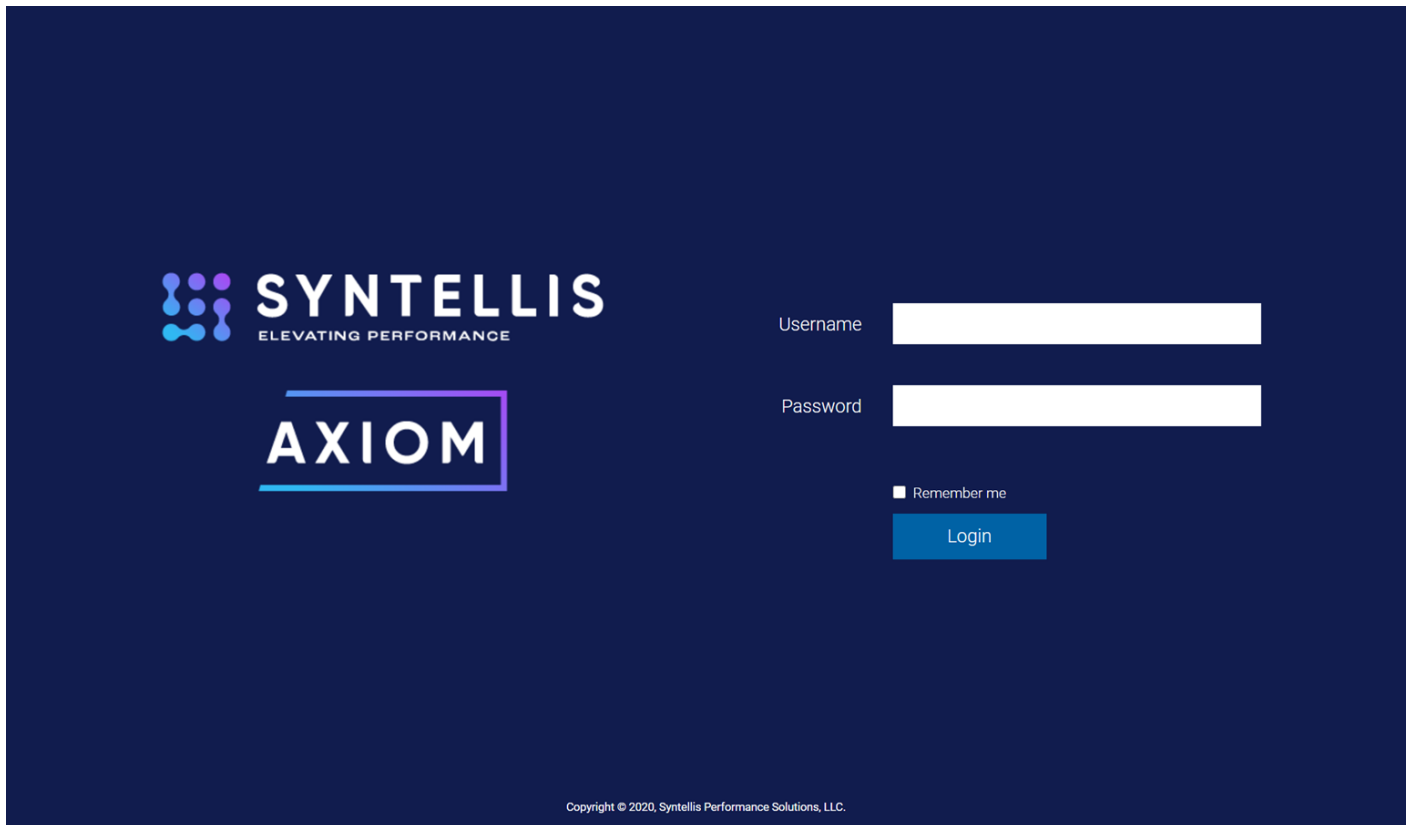
New features and enhancements

The 2020.3 release for the Axiom software platform is focused on back-end architecture improvements and extensions to better support our vertical products and our Axiom Cloud service. Due to these efforts, the 2020.3 Axiom platform release contains only a few minor client-facing enhancements.

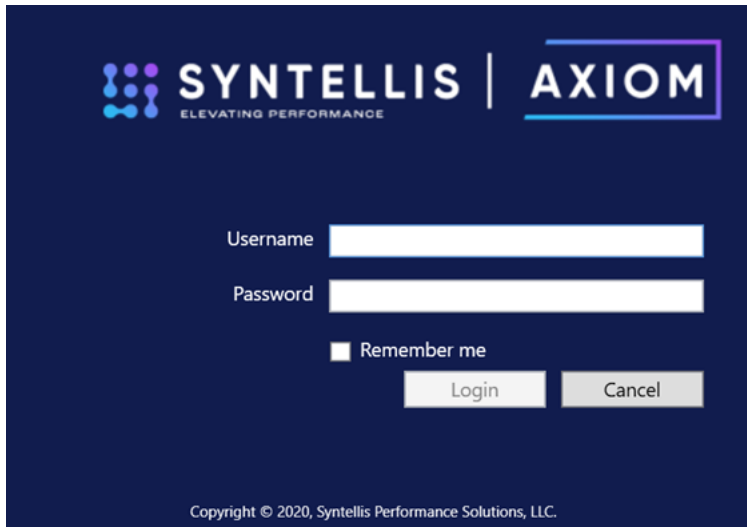
All of the client-facing changes in the 2020.3 release are detailed here in the release notes. This means that there is no separate What's New document or a release overview video for the 2020.3 Axiom platform release.

▶ Company name updates

As previously announced, Kaufman Hall Software is now Syntellis! The company name and company-branded logos in Axiom have been updated to reflect this change. This is primarily noticeable on the login screens of the Axiom Web Client and the Axiom Desktop Client (Excel or Windows).



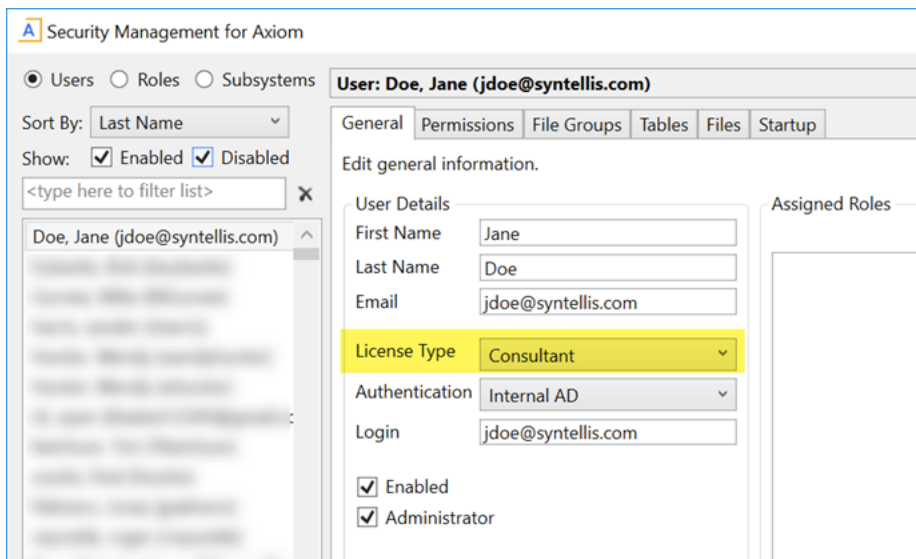
Example Web Client login screen



Example Desktop Client login screen

► New user type and authentication type for support and consultant access

A new user license type of **Consultant** is now available to allow Syntellis consultants to log into your system as part of contracted consulting engagements. This new license type identifies the user as a Syntellis representative and means that the consultant no longer needs to take up one of your organization's Standard user licenses in order to access your system. Consultant users can only be created by support users.



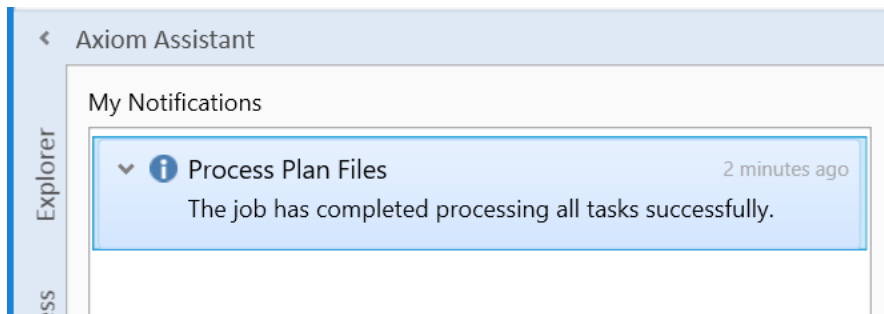
New license type for consultant access

Additionally, a new authentication type of **Internal AD** is now available for both consultant and support users, in Axiom Cloud systems only. When using Internal AD, consultant and support users are authenticated by Syntellis' internal Active Directory, providing a more secure authentication approach than Axiom Prompt authentication.

► Application notifications for Scheduler jobs that are run manually

If you run a Scheduler job manually, you can now receive a notification within the application to let you know the status of the job. This notification will display in the Notifications task pane of the Desktop Client (Excel or Windows), and in the Notifications panel of the Web Client. This notification works as follows:

- The in-application notification is only sent if the Scheduler job is run manually using the Run Now option. In-application notifications are not sent if the job is run via a scheduling rule or an event handler.
- The in-application notification honors the Notification settings defined for the job to determine whether the notification is sent. For example, if the job is set to None, then the in-application notification is not sent. If the job is set to Send All Notifications, then both an email notification and an in-application notification will be sent when the job completes.
- The in-application notification only reports the status of the job—success, failure, or partial success. It does not contain any error or success details, and does not include any messaging as defined in the Notification settings for the job. To view the details for the job, go to the Scheduler dialog or the Scheduler area of the Web Client, and view the result history.
- The in-application notification is always sent to the user who ran the job manually.

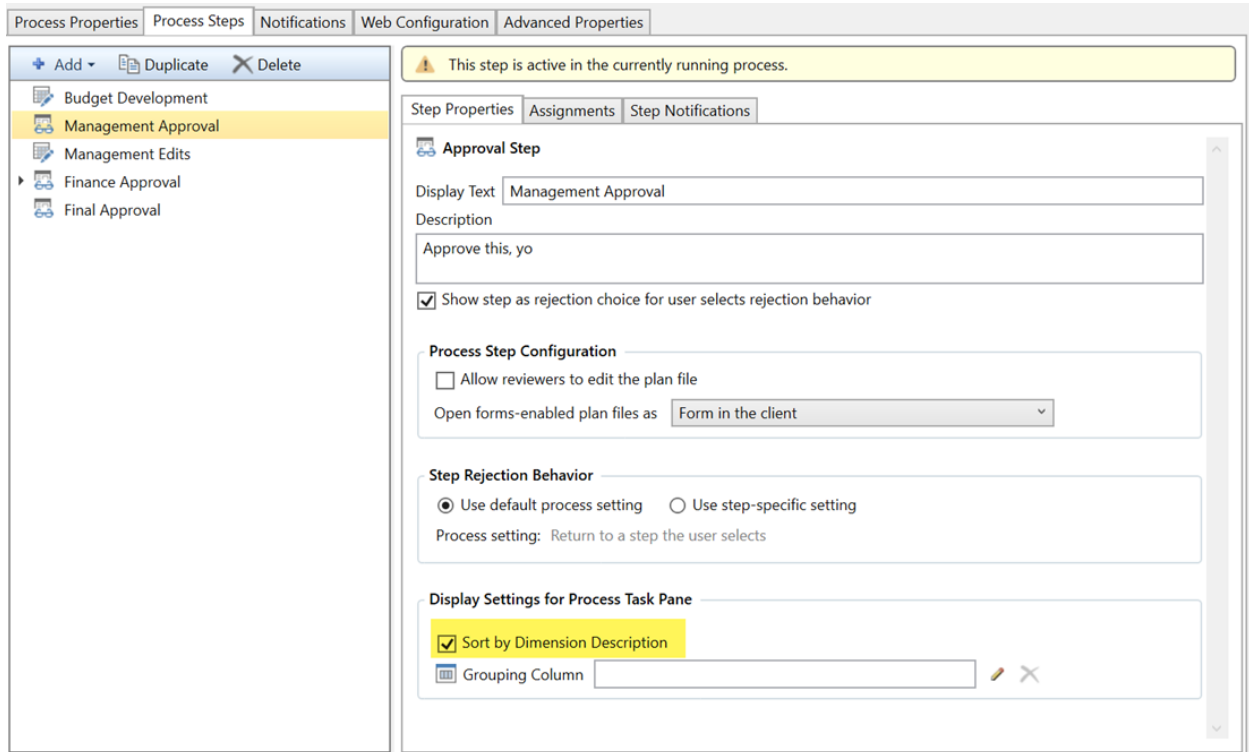


Example success notification

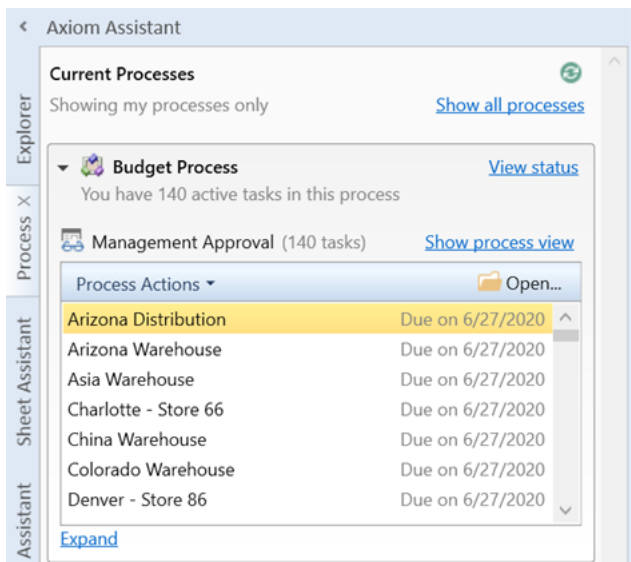
► Display process tasks by description in the Process task pane

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. 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.



New option to display tasks by description

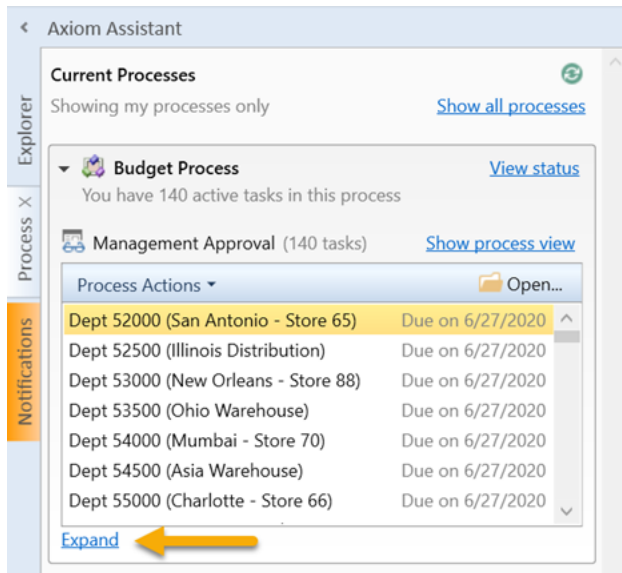


Process task pane showing tasks by description instead of plan code

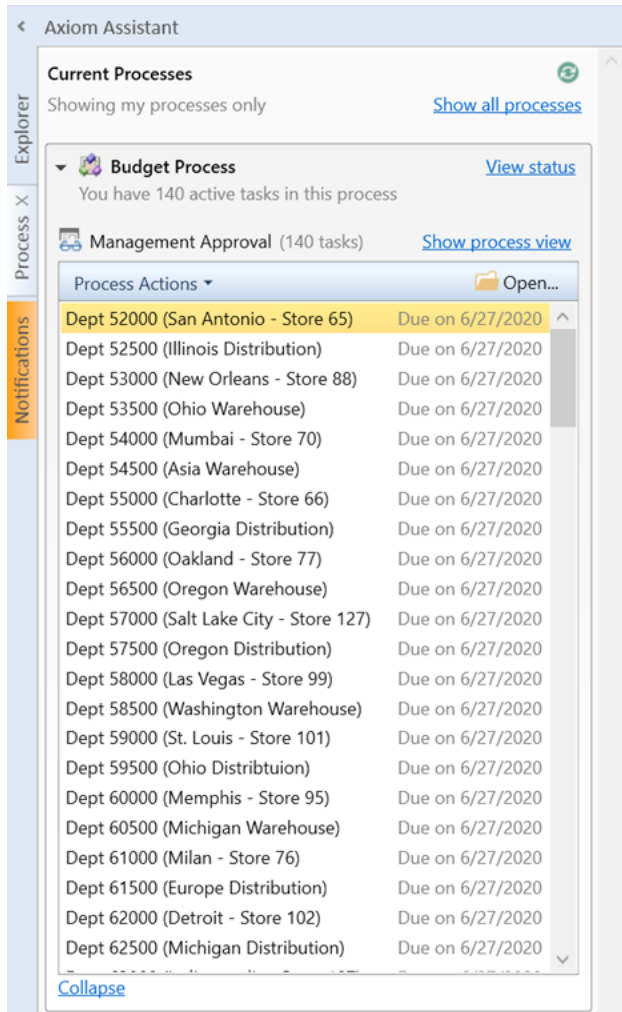
NOTE: This enhancement was originally delivered in a 2020.2 patch. However, it is included in the release notes for 2020.3 because this release provides the official rollout of the enhancement.

► Ability to expand lists of tasks in the Process task pane

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

NOTE: This enhancement was originally delivered in a 2020.2 patch. However, it is included in the release notes for 2020.3 because this release provides the official rollout of the enhancement.

What to know before upgrading

This section details the upgrade considerations and technical changes that apply when upgrading to version 2020.3. Please make sure to review this section carefully before upgrading.

Upgrade considerations

The following upgrade considerations apply when moving from the most recent Axiom release of 2020.2 to the new release of 2020.3. If you are upgrading from an earlier version, please also see the release notes for the interim versions for any additional upgrade considerations.

Certificate Requirement to Perform On-Premise Installations and Upgrades

Description	Axiom Application Server installations and upgrades now require a signed certificate to be installed on your application server.
Notes for testing and review	On-premise clients must obtain and install a signed certificate in order to upgrade to version 2020.3. For more information on this change, see Certificate requirement to install the Axiom Application Server for on-premise clients .

Deprecation of Update Service for On-Premise Platform Upgrades

Description	Use of the Axiom Update Service to perform on-premise platform upgrades is deprecated as of this release. However, the update service is still used to perform certain product package installations for on-premise clients, and therefore must still be installed on-premise for clients with upgradeable product installations. The certificate mentioned in the previous item allows installation of the update service.
Notes for testing and review	If you are an on-premise client and the Axiom Update Service is installed in your environment, you can uninstall it if you do not need to perform product installations.

Discontinued Support for Axiom Shared Client

Description The Axiom Shared Client was deprecated in 2019, and is no longer officially supported as of 2020.3. The Shared Client was used to install the Axiom client on a shared client server. This is an older client access method that the vast majority of our clients do not use anymore.

Notes for testing and review Please note that at this time we have not made any changes to Axiom that would cause the Shared Client to stop operating. If you do happen to be using the Shared Client, we anticipate that Axiom 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 client access methods. Because future releases may introduce breaking changes for the Shared Client, we strongly recommend discontinuing its use as soon as it is feasible.

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 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 2020.3.

▶ Certificate requirement to install the Axiom Application Server for on-premise clients

Starting with version 2020.3, a signed Axiom certificate is required to be present on your on-premise server in order to install the Axiom Application Server. This is a one-time process that must be performed before existing on-premise clients can upgrade to version 2020.3. If the certificate is not present, the 2020.3 Axiom Software Manager is limited to installing the Axiom Scheduler Service and the Axiom Cloud Integration Service.

The general steps to meet the certificate requirement are as follows:

- You generate a certificate with a private key on your server, and then export the **certificate.cer** file.
- You send the certificate.cer file to Axiom Support, who will use it to generate an encrypted **symmetrickeys.enc** file for your installation.
- You place the symmetrickeys.enc file in a local folder on your server.

Once this process is complete, various installation and configuration options become available within the Axiom Software Manager, including the ability to install or upgrade the Axiom Application Server. When new releases and patch updates of Axiom are issued, the existing certificate and key file can continue to be used (unless otherwise stated in the release notes).

For more information on this process, see the *Installation Guide* for Axiom version 2020.3. Note that a certificate is not required in order to install or upgrade the Axiom Scheduler Service.

The certificate requirement does not apply to Axiom Cloud clients. The Axiom Cloud Integration Service can continue to be installed without a certificate.

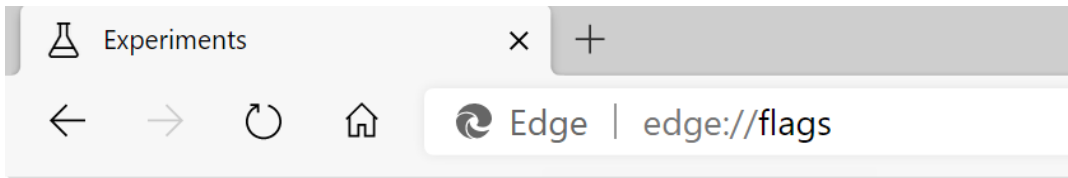
▶ Database upgrade requirements

The upgrade to version 2020.3 requires the Axiom 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 2020.3 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.

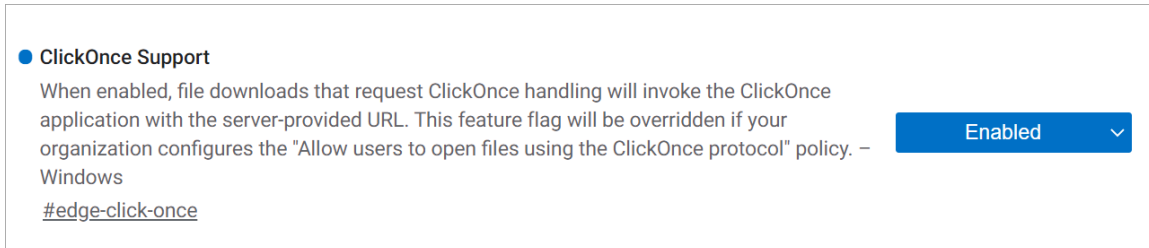
▶ Configuration requirement to launch the Axiom Desktop Client from Edge

Microsoft has released a new version of the Microsoft Edge browser based on Chromium. 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 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.

► Updated SQL Server minimum version requirement for on-premise installations

SQL Server 2016 is no longer officially supported for use with Axiom. The minimum supported version for on-premise installations is now SQL Server 2017.

Preparing and scheduling upgrades

Syntellis 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 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@syntellis.com to schedule an installation date and time, with at least three days advance notice. The request should include the following information:
 - Desired Axiom platform version.
 - Indicate whether to first refresh the test sandbox with a copy of the production instance of Axiom 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 Syntellis can apply updates to the production instance of Axiom during regular business hours: Monday through Friday, 7 AM to 7 PM Central (except holidays recognized by Syntellis).

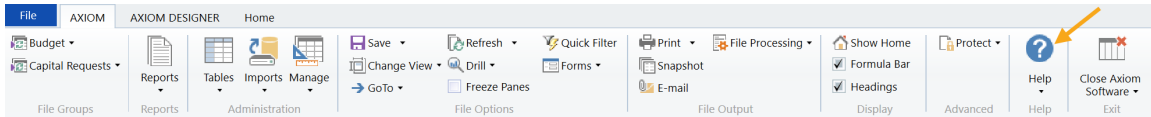
IMPORTANT: Although Syntellis strives to maintain backward-compatibility with each release, any upgrade has the potential to interrupt system functionality. The [Upgrade considerations](#) section details known impacts to existing functionality, however, other impacts may be unforeseen at the time of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

Syntellis provides world-class resources at your fingertips directly within Axiom. 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, and release updates. You can also find links to our [Syntellis Academy](#) training site and our [Syntellis Central](#) client portal.

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**.



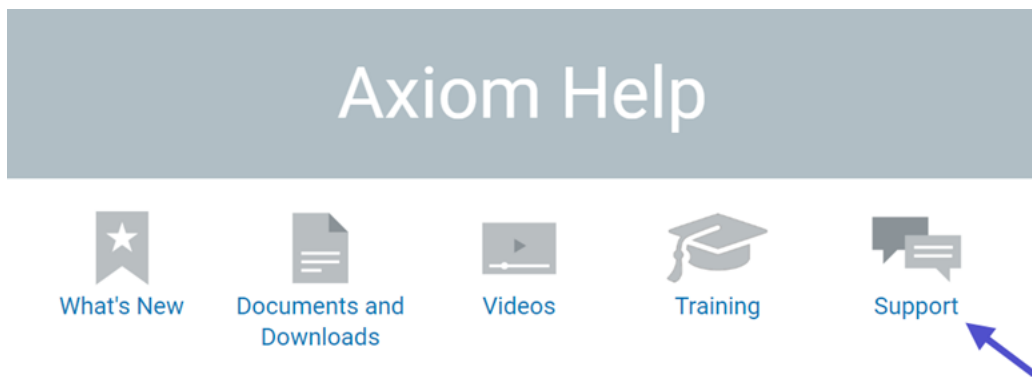
- **Web Client:** Click the question mark icon (?) in the top right of the gray task bar.



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 Syntellis. If you have any questions about upgrading to version 2020.3, please contact us via [Syntellis Central](#). You can go to the Syntellis Central site directly, or you can click the Support link on the Axiom Help home page.



Issues fixed in 2020.3

The following issues were fixed in version 2020.3.

Item	Description
51141	<p>Issue: If a process notification contains a column value variable for the key of the plan code table, the notifications may fail to deliver with the error "An item with the same key has already been added".</p> <p>Status: This issue should no longer occur.</p>
52490	<p>Issue: If an administrator is logged into the Desktop Client as another user and then opens an Axiom form, the resulting web session does not indicate the impersonation.</p> <p>Status: The impersonation status is now carried forward into the newly opened session and indicated in the audit log.</p>

Appendix: Version 2020.3 Patches

This section details the fixes and enhancements in patch releases for Axiom version 2020.3. For assistance with any patch, you can contact Support using [Syntellis Central](#).

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

▶ Current patch: 2020.3.24

This patch includes an updated publisher certificate for Axiom signed by Syntellis, to replace the previous certificate signed by Kaufman Hall. Note the following:

- If your organization has configured Microsoft Excel to require add-ins to be signed by a trusted publisher, then you must install the new certificate on client machines in order to run the Axiom Excel Client. Axiom Support can provide this certificate to clients on request.
- When installing this client update, some users may encounter the Windows SmartScreen prompt due to an unknown publisher. If this occurs, you can click **More Info** to verify that the publisher is Syntellis, then click **Run Anyway** to install.

▶ Patch 2020.3.23

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

▶ Patch 2020.3.22

This patch contains updates to the data query engine.

▶ Patch 2020.3.21

The following issues were fixed in this patch:

- 82657: A "cannot save report" error occurs when attempting to save a copy of a product-delivered Axiom Intelligence report.

▶ Patch 2020.3.19 - 2020.3.20

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

▶ Patch 2020.3.18

The following issues were fixed in this patch:

- 72769: Certain configurations of IDP-initiated SAML authentication do not work.

▶ Patch 2020.3.17

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

▶ Patch 2020.3.16

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

▶ Patch 2020.3.15

The following issues were fixed in this patch:

- 65789: Exports to an Oracle database fail with an "invalid identifier" error.

▶ Patch 2020.3.14

The following issues were fixed in this patch:

- 63077: The 2019.4 version of Cost Accounting fails to load when the system is upgraded to platform version 2020.3.
- 63969: A platform-level query change prevents the product feature Episodic Grouper from executing successfully.

Additionally, this patch contains back-end changes intended to improve performance for cloud systems.

▶ Patch 2020.3.13

The following issues were fixed in this patch:

- 61270: In certain situations, File Processing and Process Plan File tasks with heavy loads may fail with a "schema changed" error.
- 61760: Model processing for Axiom Intelligence reporting may fail with a timeout error when processing large partitioned tables.

▶ Patch 2020.3.12

The following enhancements were added in this patch:

- This patch contains some model processing improvements for Axiom Intelligence reporting.
- A Syntellis color theme was added to the Axiom Intelligence report settings.
- Translations were updated for Swedish.

► Patch 2020.3.11

The following issues were fixed in this patch:

- 56335: The "Advanced Options" section is no longer visible in certain File Processing Scheduler tasks.
- 57058: Changes to the table description are not saved when editing the description using the Edit Table dialog.
- 57095: 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.

The following enhancements were added in this patch:

- This patch contains some system configuration enhancements intended to improve performance when refreshing data for an Axiom Intelligence Reporting model.
- This patch contains updated translations for Swedish, French, and Dutch.

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