

Release Notes

Axiom

Version 2020.4

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 5
 - Upgrade considerations 5
 - Installation and technical changes 7
 - Control user access to Desktop Clients and Office Add-Ins 9
- Preparing and scheduling upgrades 14
- Getting help and training 15
- Issues fixed in 2020.4 16
- Appendix: Version 2020.4 Patches 17

About the release notes

Syntellis is pleased to announce the release of **Axiom Version 2020.4**. 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

These release notes cover the changes in the version 2020.4 release of the Axiom software platform. If you have licensed and installed products from our vertical product suites, please see the separate release notes for those products for more information.

New features and enhancements

This section provides an overview of the features and enhancements in this release. All of the client-facing changes in the 2020.4 release are detailed here in the release notes. For this release, there is no separate What's New document or a release overview video.

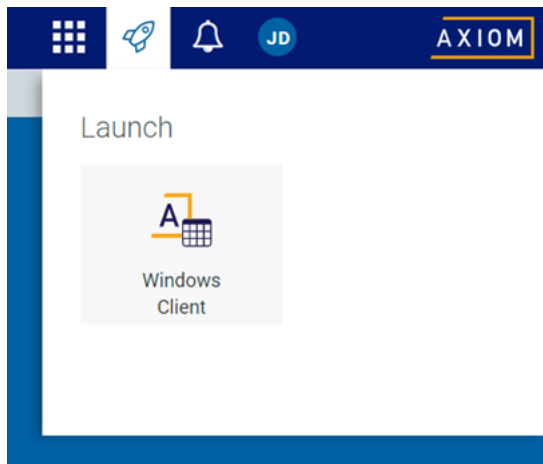
▶ Architecture and security enhancements

This release contains various infrastructure improvements to better support scaling and performance within the Axiom Desktop Clients and the Axiom Cloud, as well as general security enhancements and updates to keep all systems current.

▶ New security permissions to control access to Desktop Clients and Office Add-ins

You can now explicitly control which users and roles have access to the Windows Client and the Excel Client, as well as the Microsoft Office Add-Ins for Word and PowerPoint. This change streamlines and simplifies the user experience, so that users only see the client applications that they need to use.

The new permissions are available on the **Permissions** tab of the Security Management dialog. If a user does not have permission to a particular application, then the application does not display on the Quick Launch menu or the default home page, and the user cannot log into the application using any other launch method.

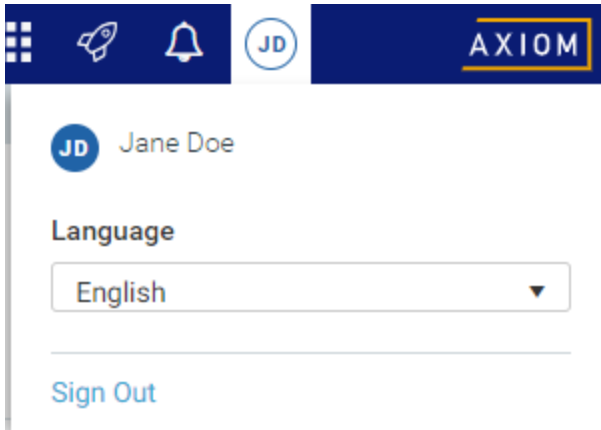


Example Quick Launch menu where the user only has permission to the Windows Client

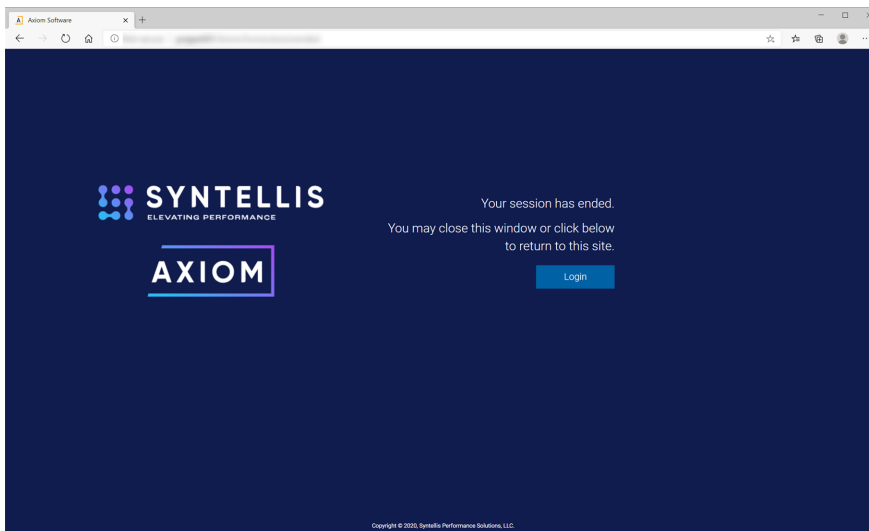
For more information on this change, including details on upgrade behavior, see [Control user access to Desktop Clients and Office Add-Ins](#).

▶ Other enhancements

- When using the **Run Scheduler Job** task, the status of the target job is now passed back to the parent job when the target job is complete. This means that by default, the parent job will now stop processing subsequent tasks if the target job fails.
- All users can now log out of the Axiom Web Client using the **Sign Out** link on the User Information panel. Previously this link was not available in system using SAML or OpenID authentication.



- When you log out of the Axiom Web Client, you are now directed to a "session ended" page. If desired, you can click the **Login** button on this page to log in again.



What to know before upgrading

This section details the upgrade considerations and technical changes that apply when upgrading to version 2020.4. 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 2020.3 to the new release of 2020.4. 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 | Starting with version 2020.3, 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 who are currently running version 2020.2 or prior must obtain and install a signed certificate in order to upgrade to version 2020.4. For more information on this change, see Certificate requirement to install the Axiom Application Server for on-premise clients . |

Access Permissions for Desktop Clients and Add-Ins

Description

Version 2020.4 introduces new security permissions to control access to the Axiom Desktop Clients (Excel and Windows) and the Microsoft Office Add-Ins (Word and PowerPoint). If a user does not have permission, then the client or add-in is not available and does not display on the Quick Launch menu or other areas.

When you upgrade, permissions to the Windows Client and the Excel Client are automatically enabled on the Everyone role, so that all users can continue using these clients after upgrading.

NOTE: If the system configuration setting **AllowShowExcel** is disabled for your system when you upgrade, then the Excel Client permission is not granted to the Everyone role when you upgrade. Only the Windows Client permission is enabled.

For the Word and PowerPoint add-ins, the upgrade does not automatically enable these permissions. After upgrading, no user will be able to use these add-ins by default.

Notes for testing and review

- If you want all users to continue to be able to access either the Windows Client or the Excel Client, then by default no action is necessary after upgrading. You can optionally modify permissions after upgrading as needed.
- If AllowShowExcel is disabled for your system, then after upgrading you must manually enable the Excel Client permission for any user or role who needs to access it. You can tell whether AllowShowExcel is disabled for your system by opening the Quick Launch menu in the Web Client and checking to see whether the Excel Client icon is present on the menu. If the icon is not present, AllowShowExcel is disabled.
- If you want any users to be able to use the Word or PowerPoint add-in, then after upgrading you must manually enable the relevant permission as needed.

For more information, see [Control user access to Desktop Clients and Office Add-Ins](#).

Installation and technical changes

The following installation and technical changes apply when upgrading to version 2020.4.

▶ 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. If the certificate is not present, the Axiom Software Manager is limited to installing the Axiom Scheduler Service and the Axiom Cloud Integration Service.

If you are an on-premise client and you are upgrading from version 2020.2 or prior, then you must obtain this certificate before you can upgrade to version 2020.4. If you are already running version 2020.3, then your existing certificate works to upgrade to 2020.4, and no further action is necessary.

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 2020.4. 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.

▶ Discontinued support for Microsoft Internet Explorer

Microsoft Internet Explorer 11 is no longer officially supported for use with Axiom. It is an older browser that is no longer commonly used by our client base, and mainstream support is no longer provided by Microsoft.

Please note that at this time we have not knowingly made any changes to Axiom that would cause it to stop operating in Internet Explorer 11. If you do happen to be using Internet Explorer 11, 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 browsers. Because future releases may introduce breaking changes for Internet Explorer 11, we strongly recommend discontinuing its use with Axiom as soon as it is feasible.

► Upgrade required for Axiom Cloud Integration Service

When upgrading to 2020.4, it is required to upgrade your Axiom Cloud Integration Service to 2020.4. Older versions of the service may experience issues attempting to perform tasks for a 2020.4 cloud system.

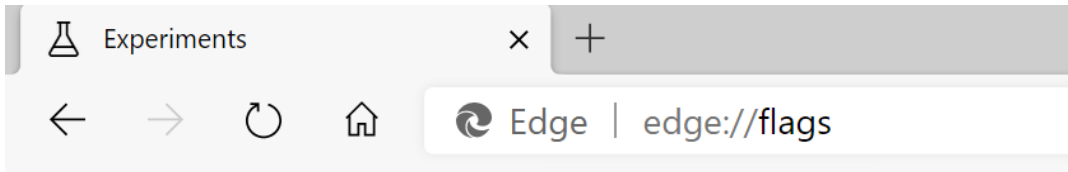
► Database upgrade requirements

The upgrade to version 2020.4 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 2020.4 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.

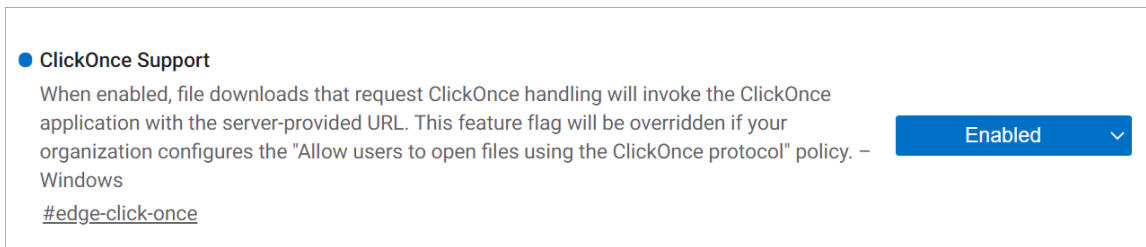
► Configuration requirement to launch the Axiom Desktop Client from Edge

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

Control user access to Desktop Clients and Office Add-Ins

You can now control which users and roles have access to the Axiom Desktop Clients and the Microsoft Office Add-Ins, using permissions defined in Axiom security. These new permissions streamline and simplify the user experience, so that all of your users only have access to the specific client applications and add-ins that they need to use. For example:

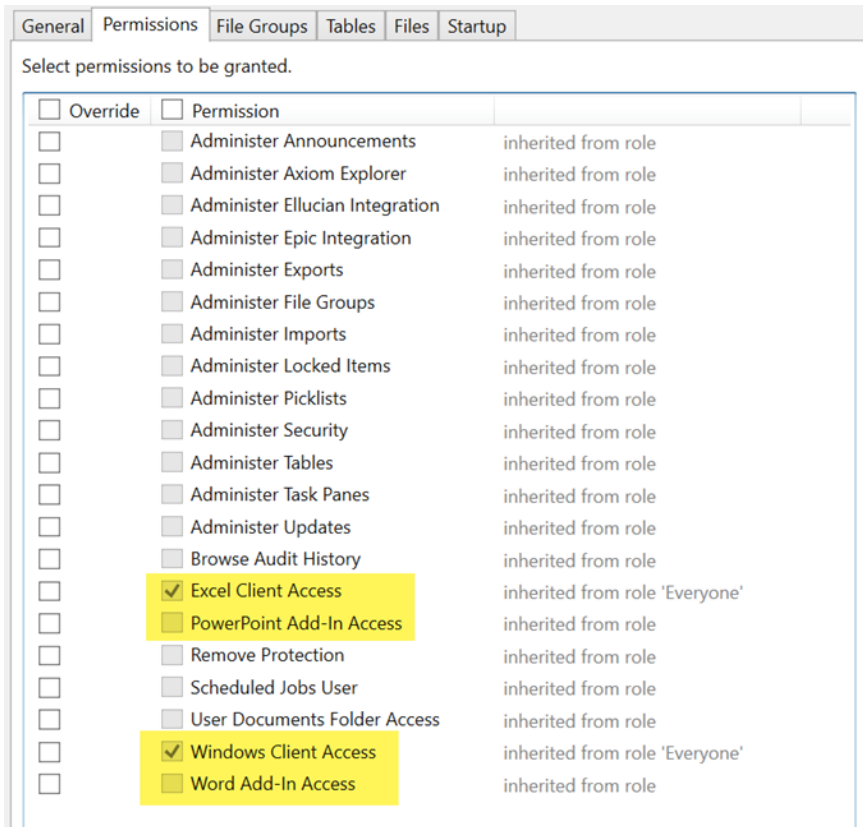
- End users who only need to access the Windows Client can be limited so that it is the only client option available.
- The ability to use the Excel Client can now be enabled only for those users who need to perform spreadsheet design activities.
- The ability to use the Word or PowerPoint add-ins can now be enabled only for those users who need to edit Word and PowerPoint documents within the Axiom Reports Library. Users who only need to view these documents will no longer inadvertently install the add-in when the document is opened.
- Additionally, users who only need to use the Web Client can be limited so that they do not have permission to any of the Desktop Clients or Office add-ins, thereby removing unnecessary options from their user experience.

▶ New security permissions

The following security permissions are now available on the **Permissions** tab of the **Security Management** dialog:

- **Excel Client Access**
- **Windows Client Access**
- **PowerPoint Add-In Access**
- **Word Add-In Access**

If a user is granted these permissions at the user or role level, then the user can see the client application or the add-in on the Quick Launch menu (and other places), and can launch the client or add-in.



New security permissions to control client access and add-in access

If a user does not have these permissions, then the client or add-in is hidden from the user, and the user cannot launch the client or add-in.

► Upgrade behavior for Desktop Client permissions

When you upgrade to 2020.4, Axiom automatically enables the **Windows Client Access** permission on the Everyone role, so that all of your users can continue to use the Windows Client.

The upgrade behavior of the Excel Client depends on the system configuration setting **AllowShowExcel** (True/False). In previous versions, this optional setting was used to control whether the Excel Client displayed on the Quick Launch menu. Organizations who did not want end users to use the Excel Client could set this to False so that the icon was hidden. This did not prevent use of the Excel Client, but it did discourage use.

- If AllowShowExcel is True, then **Excel Client Access** is enabled on the Everyone role, and all users can continue to use the Excel Client.

- If AllowShowExcel is False, then the upgrade does not enable the Excel Client for any users or roles. Users with the **Administrator** check box can continue to use the Excel Client because administrators are implicitly granted all permissions, but no other users can access the Excel Client. In this circumstance, you must manually enable **Excel Client Access** for any users or roles who need to be able to use the Excel Client.

You can tell whether AllowShowExcel is False in your current system by opening the Quick Launch menu in the Web Client. If the Excel Client is not shown, then AllowShowExcel is False.

If your installation uses subsystems, then Windows Client Access and Excel Client Access are automatically enabled for all existing subsystems. This is necessary in order to allow the permission on the Everyone role to take effect. If a particular client is not necessary for use at a subsystem level, then you can disable the access permission for the subsystem, so that users in the subsystem cannot use that client (unless the permission is allowed by another subsystem that the user belongs to).

► Upgrade behavior for Office Add-In permissions

The upgrade to 2020.4 does *not* enable the **PowerPoint Add-In Access** permission or the **Word Add-In Access** permission for any users or roles. Users with the **Administrator** check box can continue to use the add-ins because administrators are implicitly granted all permissions, but no other users can access the add-ins.

If you have any non-administrator users who need to access one or both of these add-ins, then you must manually enable the necessary permissions at a user or role level.

► Deprecated system configuration settings to hide icons on the Quick Launch menu

In previous versions, the only control over client and add-in access was provided by a set of system configuration settings:


- AllowShowExcel
- AllowShowPowerPoint
- AllowShowWord

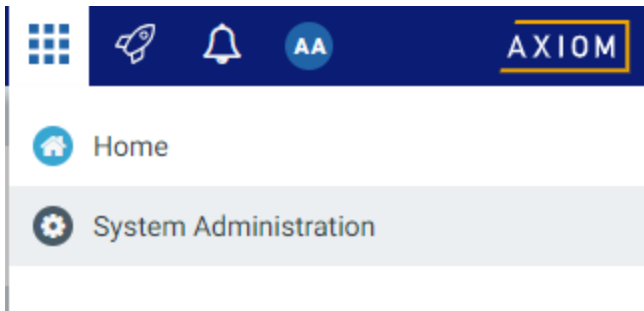
If any of these system configuration settings were set to False, then the corresponding icon would be hidden from the Quick Launch menu. This did not prevent use of the client or add-in, but it did discourage use.

Going forward, these system configuration settings are deprecated because they are no longer necessary. However, they have not yet been removed, and they will be honored if set to False. For example, imagine that your system has AllowShowExcel set to False, but a user has the Excel Client Access permission. The Excel Client icon will be hidden from the Quick Launch menu per the system configuration setting, but the user can launch the Excel Client using some other method (such as a desktop shortcut or a ClickOnce hyperlink).

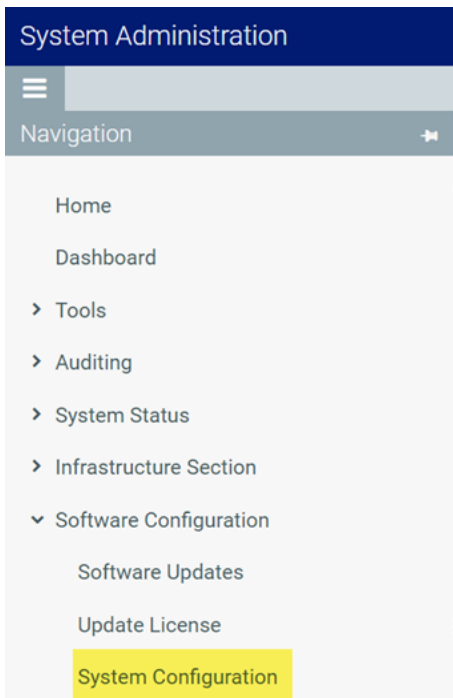
If you currently have any of these system configuration settings set to False, we recommend changing them to True after upgrading to 2020.4. This will allow the security permissions to be the sole determiner of whether the client or add-in icons are hidden on the Quick Launch menu. If the system configuration settings are left at False, this may cause confusion in the future when trying to troubleshoot an access issue for the Excel Client or either of the add-ins.

After the upgrade, an administrator user can easily review and edit these settings as follows:

1. In the Web Client, click the menu icon  in the Global Navigation Bar. From the Area menu, select **System Administration**.

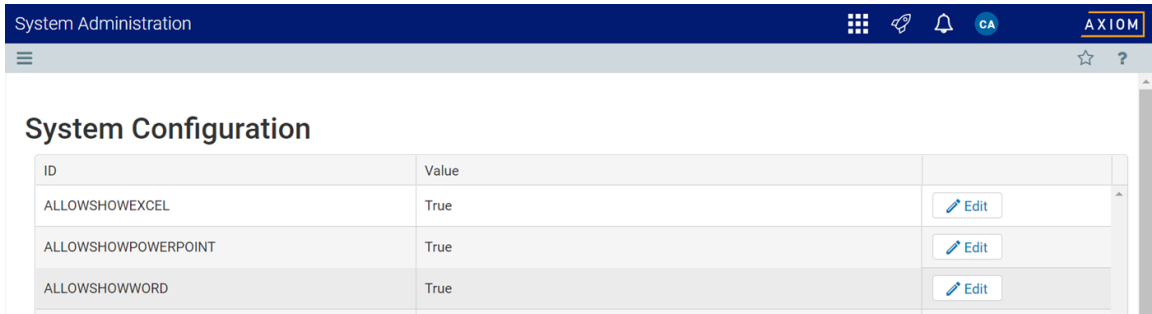


2. From the **Navigation** panel, select **Software Configuration > System Configuration**.



3. On the System Configuration page, review the three "AllowShow" settings and make sure they are all set to True. If you need to edit a setting:
 - Click the **Edit** button. This makes the **Value** field editable.

- Type `True` into the Value field.
- Click the **Update** button.



The screenshot shows a web interface for System Administration. The top navigation bar includes the text "System Administration" and the "AXIOM" logo. Below the navigation bar, the main content area is titled "System Configuration" and contains a table with the following data:

| ID | Value | |
|---------------------|-------|----------------------|
| ALLOWSHOWEXCEL | True | Edit |
| ALLOWSHOWPOWERPOINT | True | Edit |
| ALLOWSHOWWORD | True | Edit |

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 Syntellis 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).

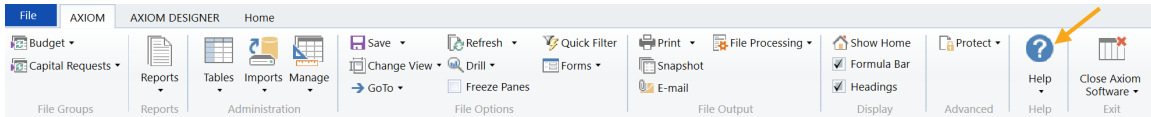
IMPORTANT: Although Syntellis strives to maintain backward-compatibility with each release, any upgrade has the potential to interrupt system functionality. The [Upgrade considerations](#) section details known impacts to existing functionality, however, other impacts may be unforeseen at the time of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



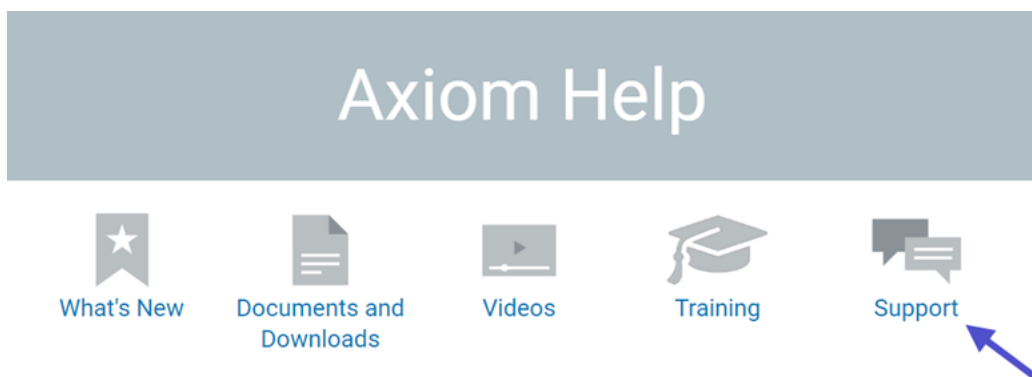
- **Web Client:** Click the question mark icon (?) in the top right of the gray task bar.



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 2020.4, 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 2020.4

The following issues were fixed in version 2020.4.

| Item | Description |
|-------|--|
| 34753 | <p>Issue: When exporting an Axiom spreadsheet file, protection is not applied to the exported file.</p> <p>Status: Protection is now applied as documented.</p> |
| 61984 | <p>Issue: If the SystemDataPurge job runs at the same time as other jobs, deadlock errors may occur.</p> <p>Status: Updates were made to the data purge routine to greatly reduce or eliminate the possibility of deadlock errors.</p> |
| 62568 | <p>Issue: Upgrading the Axiom Cloud Integration Service to 2020.3 does not register the required symmetrickeys.enc file, which prevents the service from performing certain functions.</p> <p>Status: This issue should no longer occur. Upgrades to 2020.4 will register the required file.</p> |
| 62997 | <p>Issue: An EncryptionConnectionStringKey error occurs when attempting to run an external database import using the 2020.3 Axiom Cloud Integration Service.</p> <p>Status: This issue should no longer occur after upgrading to the 2020.4 version of the service.</p> |
| 68377 | <p>Issue: When a plan file process has more than 10 steps, and steps are configured with user-selected rejection behavior, future steps may show as rejection steps.</p> <p>Status: User-selected rejection behavior only shows prior steps as expected.</p> |

Appendix: Version 2020.4 Patches

This section details the fixes and enhancements in patch releases for Axiom version 2020.4. 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: 2020.4.25

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 2020.4.22 - 2020.4.24

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

▶ Patch 2020.4.21

This patch contains an updated certificate for the Axiom Excel add-in.

▶ Patch 2020.4.20

This patch contains updates to the data query engine.

▶ Patch 2020.4.19

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

▶ Patch 2020.4.18

The following issues were fixed in this patch:

- 82653: A "cannot save report" error occurs when attempting to save a copy of a product-delivered Axiom Intelligence report.

▶ Patch 2020.4.17

The following issues were fixed in this patch:

- 61635: In cloud systems using multiple application server instances, changing the system or table current period value does not always update calculated fields across all instances.

▶ Patch 2020.4.15 - 2020.4.16

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

▶ Patch 2020.4.14

The following issues were fixed in this patch:

- 78318: If a user is in a form without the save lock, and the save lock becomes available, refreshing the browser page to reload the form does not acquire the lock.

▶ Patch 2020.4.13

This patch contains security updates.

▶ Patch 2020.4.12

The following issues were fixed in this patch:

- 74920: Certain configurations of IDP-initiated SAML authentication do not work.

Additionally, this patch contains updated translations.

▶ Patch 2020.4.11

This patch contains fixes for internal features. No client-facing fixes were included in this patch.

Microsoft, Excel, Windows, SQL Server, Azure, and Power BI are trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries.

This document is Syntellis Performance Solutions, LLC Confidential Information. This document may not be distributed, copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable format without the express written consent of Syntellis Performance Solutions, LLC.

Copyright © 2021 Syntellis Performance Solutions, LLC. All rights reserved. Updated: 12/22/2021