

Release Notes

Axiom

Version 2021.1

AXIOM

Contents

- About the release notes 2
- New features and enhancements 3
- What to know before upgrading 6
 - Upgrade considerations 6
 - Installation and technical changes 11
- Preparing and scheduling upgrades 12
- Getting help and training 13
- Issues fixed in 2021.1 14
- Appendix: Version 2021.1 Patches 15

About the release notes

Syntellis is pleased to announce the release of **Axiom Version 2021.1**. 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 2021.1 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.

► New drag-and-drop Report Builder for ad hoc reporting

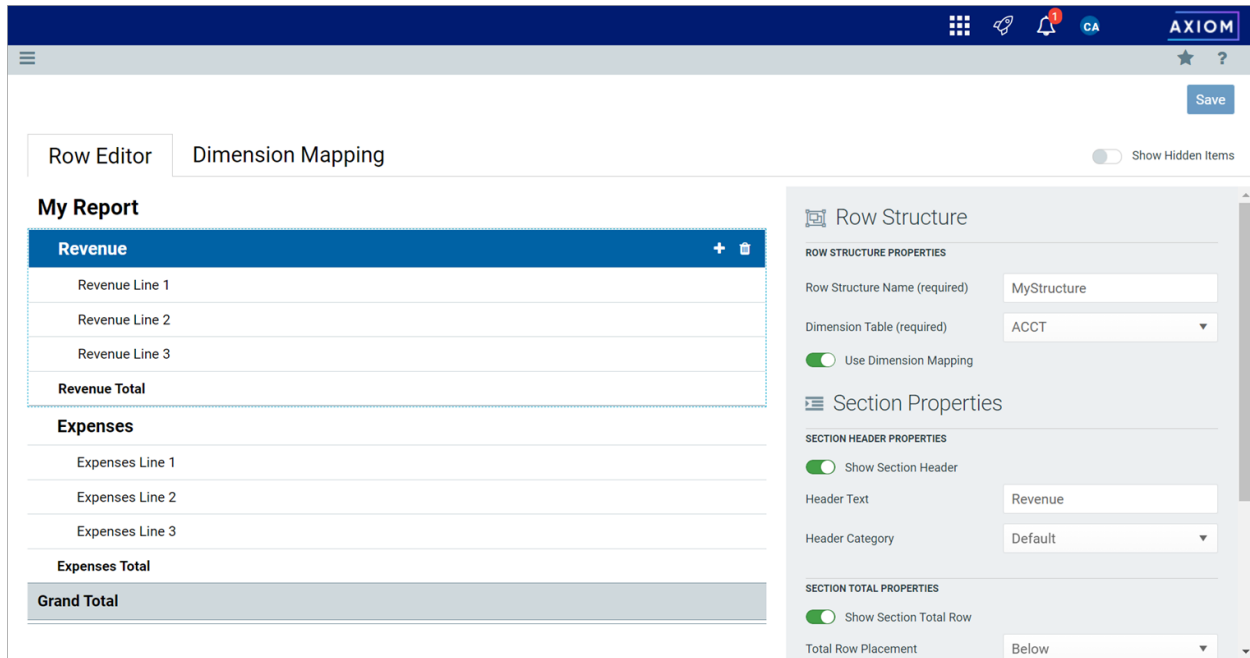
Version 2021.1 introduces phase 1 of our new Report Builder, where you can create reports in the browser using an intuitive drag-and-drop interface.

- Build browser-based reports that use a dynamic row dimension or a fixed row structure to display data in a grid
- Browse related tables and drag-and-drop columns out to the report grid—the grid updates immediately in response to changes so you can easily see what you are building
- Create simple calculations for display in grid columns such as total, difference, and percent difference
- Intuitive configuration of report titles, column properties, and grid properties
- Use the separate fixed row structure editor to create reusable row structures with multiple sections, headers, subtotals, and totals
- Report viewers can explore data in the resulting web reports using features such as filtering, sorting, drilling, and exporting to PDF or Excel

The screenshot displays the 'Report Center' interface. On the left, the 'Data Context' panel shows a search for 'GL2020' and a list of related tables. The main area shows a report titled 'Budget to Actuals | Corporate' for 'Through June 2020'. The report grid has columns for 'DEPT', 'Q1 2020' (Actuals, Budget, Difference), and 'Q2 2020' (Actuals, Budget, Difference). The data rows list various stores with their respective financial metrics. A 'Revenue Total' row is at the bottom. On the right, the 'Grid Configuration' panel shows settings for column and grid properties, such as enabling filters, sorting, and reordering columns, and options for fixed rows and drilling.

DEPT	Q1 2020			Q2 2020		
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference
Chicago - Store 45	\$1,253,574	\$983,328	27.48%	\$1,651,523	\$968,429	70.54%
Colorado Springs - Store 120	\$128,106	\$603,741	-78.78%	\$651,444	\$594,593	9.56%
Columbus - Store 121	\$426,812	\$723,489	-41.01%	\$382,245	\$712,527	-46.35%
Dallas - Store 78	\$145,751	\$191,276	-23.80%	\$336,980	\$188,378	78.89%
Denver - Store 86	\$1,583,560	\$1,126,299	40.60%	\$1,645,244	\$1,109,234	48.32%
Detroit - Store 102	\$31,931	\$1,041,024	-96.93%	\$28,615	\$1,025,251	-97.21%
Fort Worth - Store 149	\$1,532,855	\$983,170	55.91%	\$1,428,268	\$968,273	47.51%
Fresno - Store 108	\$121,953	\$208,755	-41.58%	\$126,465	\$205,592	-38.49%
Houston - Store 112	\$26,560	\$17,841	48.87%	\$10,712	\$17,571	-39.04%
Indianapolis - Store 107	\$15,653	\$9,580	63.39%	\$15,653	\$9,434	65.92%
Kansas City - Store 137	\$71,133	\$191,544	-62.86%	\$36,415	\$188,642	-80.70%
Revenue Total	\$38,549,625	\$37,842,183	1.87%	\$31,200,174	\$37,268,817	-16.28%

Example dynamic grid report in the new Report Builder



Example fixed row structure editor to build sections for fixed report grids

For more information, see the following topics in Axiom Help:

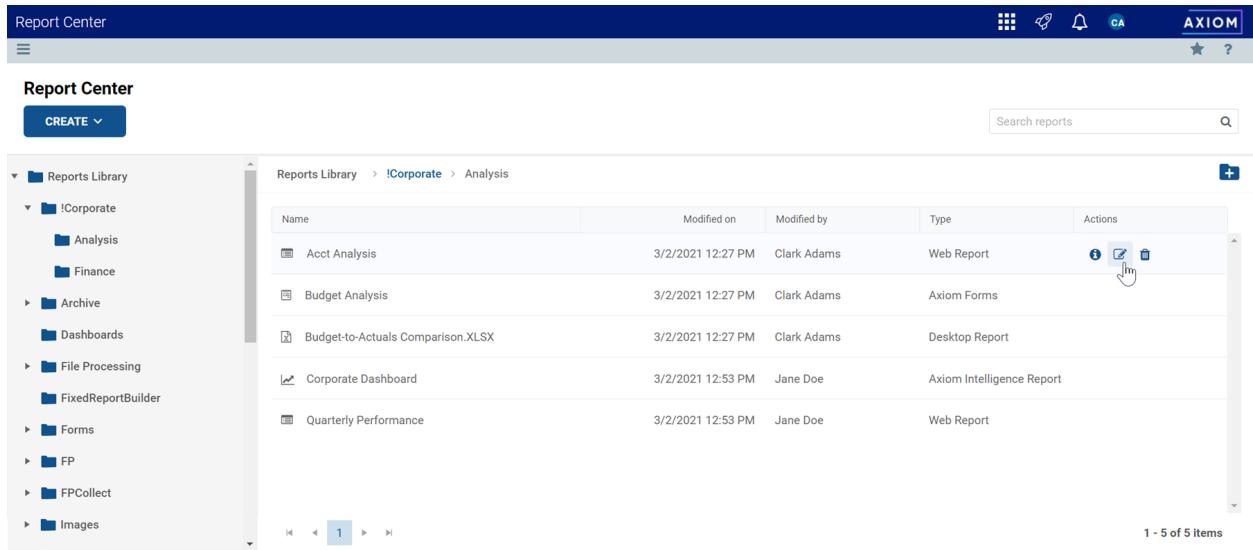
- *Web Reports (AX1827)*
- *Using the Report Builder (AX1828)*
- *Defining fixed row structures for web reports (AX1829)*

NOTE: The ability to create new web reports and use the Report Builder is controlled by a new security permission, **Create Web Reports**. Enable this permission for any users or roles who you want to be able to create web reports using this new feature.

► New Report Center for easy report access

Now you can easily access all of your reports using a centralized hub in the Web Client. Using the new Report Center, you can:

- Create new web reports (all clients) and Axiom Intelligence reports (clients with certain product licenses)
- Browse report folders and view any report that you have access to—including web reports, Axiom forms, Axiom Intelligence reports, and desktop (spreadsheet) reports
- Open reports for editing, in the appropriate editor for the report type
- Perform other report management activities, such as creating new report folders, deleting unneeded reports and folders, and renaming folders



New Report Center in the Web Client

For more information, see the following topic in Axiom Help: [Report Center \(AX1265\)](#).

► Additional enhancements

- You can now define a constraint expression for a column to limit the valid values for that column. This can be a good option when you want to limit a column to a short list of values and do not otherwise have a need to create a full lookup table.
- When assigning a lookup column to a column to limit the valid values for that column, the lookup can now optionally point to an alternate key column of a reference table.
- A new import transform is available to look up an identity key or alternate key value from a dimension table, given a string value that corresponds to a key or alternate key value in the dimension table.

What to know before upgrading

This section details the upgrade considerations and technical changes that apply when upgrading to version 2021.1. Please make sure to review this section carefully before upgrading.

Upgrade considerations

The following upgrade considerations apply when moving from the most recent Axiom release of 2020.4 to the new release of 2021.1. If you are upgrading from an earlier version, please also see the release notes for the interim versions for any additional upgrade considerations.

Open Plan Files Limit in Desktop Client

Description By default, the Open Plan Files dialog in the Desktop Client (Excel or Windows) is now limited to opening one plan file at a time. This change was made to prevent end users from accidentally or intentionally opening many plan files at once, which may take a long time to open and tie up the application in the meantime.

This behavior is controlled by a new system configuration setting named **LimitOpenPlanFilesDialogToSingleSelection**. By default, this is set to True when you upgrade to version 2021.1.

If your system has smaller plan files and you want to allow end users to open multiple plan files at once, you can change this setting to False to restore the previous behavior.

Notes for testing and review No testing necessary. If you decide that you want to change the system configuration setting to restore the previous behavior, see the following topic in Axiom Help: *System configuration settings (AX2015)*.

Deprecation of Legacy Web Report Editor

Description Starting with version 2021.1 and the introduction of the new Report Builder, the legacy web report editor is now considered a deprecated feature. Existing web reports should continue to work as they did before, and you can continue to edit these existing reports. However, the old Report Designer page has been deprecated, along with the old path for creating legacy web reports.

The new Report Builder will be the focus for browser-based reporting enhancements going forward. All new web reports should be created using this new drag-and-drop interface.

Legacy web reports can still be opened from the new Report Center as needed. These reports are labeled as the following report type: **Deprecated Web Report**. Once the report is opened, you can use the wrench icon in the toolbar to edit it as in previous versions (if you have read/write access to the report).

Any existing built-in links to the old Report Designer page have been automatically updated to navigate to the new Report Center page. This includes the legacy **Navigation - Report Designer** command, as well as the Report Designer menu item on the Reports menu of the Desktop Client.

Notes for testing and review If your organization currently uses any legacy web reports, you can continue to use these reports in 2021.1. However, you should plan to migrate these reports to the new web report format or a different report format when it is convenient to do so.

If your web navigation task pane contains the legacy **Navigation - Report Designer** command, this command now automatically navigates to the new Report Center page. However, depending on how the command was configured, the display text in the navigation panel may still be "Report Designer" instead of "Report Center". You can manually update this text in your web navigation task pane, or you can update your task pane with a new copy of the platform default task pane. For more information on modifying web navigation task panes, see the following topic in Axiom Help: *Defining content for the Web Client Navigation panel (AX1464)*. Generally speaking, this should only be necessary for custom systems that do not use installed products.

New Path to Create Axiom Intelligence Reports

Description	<p>Axiom Intelligence reports are now created from the new Report Center page instead of the deprecated Report Designer page. All built-in links to the old Report Designer page have been automatically updated to navigate to the new Report Center page.</p> <p>From the Report Center page, use Create > New Axiom Intelligence report to create an Axiom Intelligence report. This option is only available in systems with an Axiom Intelligence license and where Axiom Intelligence has been enabled. As in previous versions, Axiom Intelligence reporting is only available to certain products and only in cloud systems.</p>
Notes for testing and review	<p>No testing necessary. Going forward, if your system is enabled for Axiom Intelligence reporting, use this new path to create Axiom Intelligence reports.</p>

Access Permissions for Desktop Clients and Add-Ins

Description

Starting with version 2020.4, user access to the Axiom Desktop Clients (Excel and Windows) and the Microsoft Office Add-Ins (Word and PowerPoint) is controlled using security permissions. 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 from 2020.3 or earlier, 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

Clients upgrading from 2020.3 or earlier should note the following:

- 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 the following topic in Axiom Help: *Control access to Desktop Clients and Office Add-Ins (AX1825)*.

If you are upgrading from 2020.4, then no action is necessary as these upgrade actions have already occurred.

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 2021.1. For more information on this change, see [Certificate requirement to install the Axiom Application Server for on-premise clients](#).

If you are upgrading from 2020.3 or 2020.4, then no additional action is necessary. You can continue to use the same certificate that you obtained for the previous installation.

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 Any clients that are still using the Shared Client should discontinue use as soon as possible. Although the Shared Client remains available in the Axiom Software Manager for testing purposes, we anticipate removing it from the installer in an upcoming release.

Installation and technical changes

The following installation and technical changes apply when upgrading to version 2021.1.

► 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 2021.1. If you are already running version 2020.3, then your existing certificate works to upgrade to 2021.1, 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 2021.1. 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.

► Upgrade required for Axiom Cloud Integration Service

It is required to upgrade your Axiom Cloud Integration Service when upgrading to 2021.1.

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).

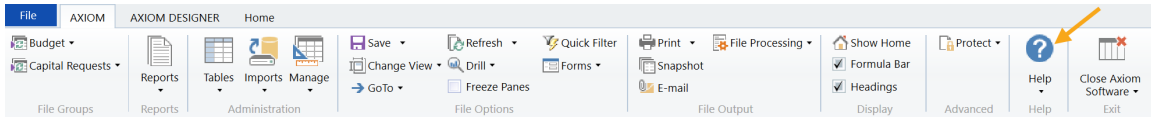
IMPORTANT: Although Syntellis strives to maintain backward-compatibility with each release, any upgrade has the potential to interrupt system functionality. The [Upgrade considerations](#) section details known impacts to existing functionality, however, other impacts may be unforeseen at the time of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



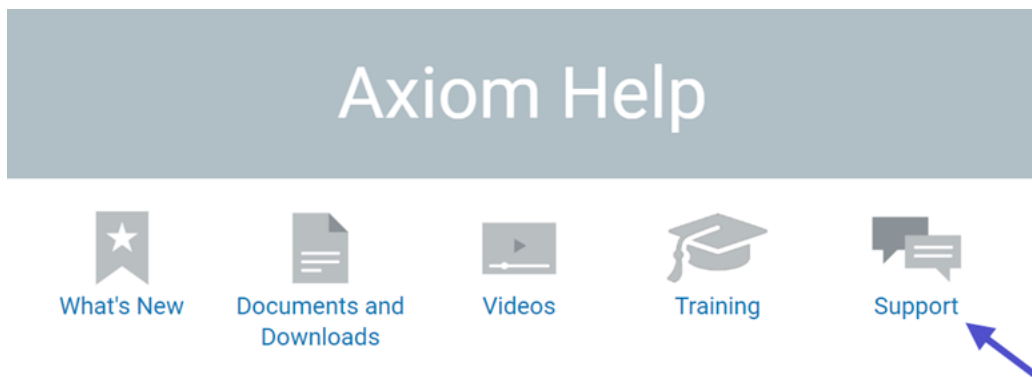
- **Web Client:** Click the question mark icon (?) in the top right of the gray task bar.



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 2021.1, 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 2021.1

The following issues were fixed in version 2021.1.

Item	Description
17252	<p>Issue: If a user tries to log into the Web Client while the system is in admin-only mode, an incorrect error message displays.</p> <p>Status: The error message now correctly communicates that the system is in admin-only mode.</p>
41804	<p>Issue: If a user has many plan file permission sets, the Effective Permissions dialog may exceed the screen without a scrollbar.</p> <p>Status: This dialog now has a maximum size with a scrollbar as needed.</p>
43457	<p>Issue: When selecting an Axiom user to tag in the Message Stream, disabled user accounts show in the list.</p> <p>Status: Disabled user accounts no longer display in this list.</p>
70340	<p>Issue: If the target column for a Grid refresh variable has multiple description columns, only the values from the first column are displayed in the simple Choose Value dialog.</p> <p>Status: All description column values are now displayed when using this configuration.</p>

Appendix: Version 2021.1 Patches

This section details the fixes and enhancements in patch releases for Axiom version 2021.1. 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: 2021.1.25

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 2021.1.21 - 2021.1.24

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

▶ Patch 2021.1.20

This patch contains security updates.

▶ Patch 2021.1.19

The following issues were fixed in this patch:

- 99778: In an Axiom form, total rows in a fixed report component do not populate if the referenced data row section doesn't have a subtotal row.

▶ Patch 2021.1.18

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

▶ Patch 2021.1.17

This patch contains updates to the data query engine.

▶ Patch 2021.1.16

This patch contains an enhancement related to the Owners of All Previous Steps recipient type for process management that was added in patch 2021.1.12. When this new recipient type was first delivered, it would only work for steps that were activated *after* installing the patch. This is because the recipient type depends on new behavior that logs the current step owners in the process history when a plan file becomes active in the step. If a step was already completed or currently active for a plan file when the patch was installed, this event would not be generated for those steps—it would only be generated for future steps as the plan file moved forward in the process.

Patch 2021.1.16 contains upgrade behavior that will "backfill" previous step owners for any steps that were completed or active before the introduction of the new behavior to support the Owners of All Previous Steps recipient type:

- For steps that are already completed, the user who completed the step will be logged in the process history. If other users were assigned owners when the step was active, these users will not be logged.
- For steps that are active, the currently assigned step owners will be logged in the process history.

This means that the Owners of All Previous steps recipient type will now work to notify owners of all previous steps, with the limitation that only a single step owner will be notified for steps that were completed before the introduction of the new recipient type.

Additionally, the following issues were fixed in this patch:

- 93014: OData requests remain open until they time out, instead of automatically closing when complete.

▶ Patch 2021.1.15

The following issues were fixed in this patch:

- 90199: When use of the Filter Wizard includes a count of rows returned by the filter, the process that detects the count is not optimized.
- 90380: The Product Staging Table import type can fail with an index out of range error if the affected tables contain a Boolean column.

▶ Patch 2021.1.13

The following issues were fixed in this patch:

- 88222: In the Report Builder, the Live Updates setting is enabled by default when it should be disabled by default.
- 88991: The add new option of the import transform Update Alternate Key Lookup Values doesn't work if the key column is string.

The following enhancements were included in this patch:

- The import type of Internal Database has a new source type of Product Staging Table. This type is intended to be used with installed products, and therefore will be configured and delivered with products as needed.

Additionally, this patch contains updated translations.

▶ Patch 2021.1.12

The following issues were fixed in this patch:

- 87264: Imports fail with an "incorrect syntax" error if a self-referencing lookup column uses a SQL reserved word such as "Grant".
- 87521: Users with viewer-only licenses cannot launch the Excel Client or Windows Client, because the new access permissions are ignored.

This patch also contains an enhancement to process management recipient notifications. A new recipient type named **Owners of All Previous Steps** is now available to send a notification to all of the assigned owners of previous steps. Additionally, the existing recipient type of Previous Step Owners has been renamed to **Completer of Previous Step**, to clarify that the notification will only be sent to the user who completed the immediately previous step. This is a display text change only; the behavior of this existing recipient type is the same.

▶ Patch 2021.1.11

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

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