

Release Notes

Axiom

Version 2021.2

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

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About the release notes

Syntellis is pleased to announce the release of **Axiom Version 2021.2**. 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 2021.2 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

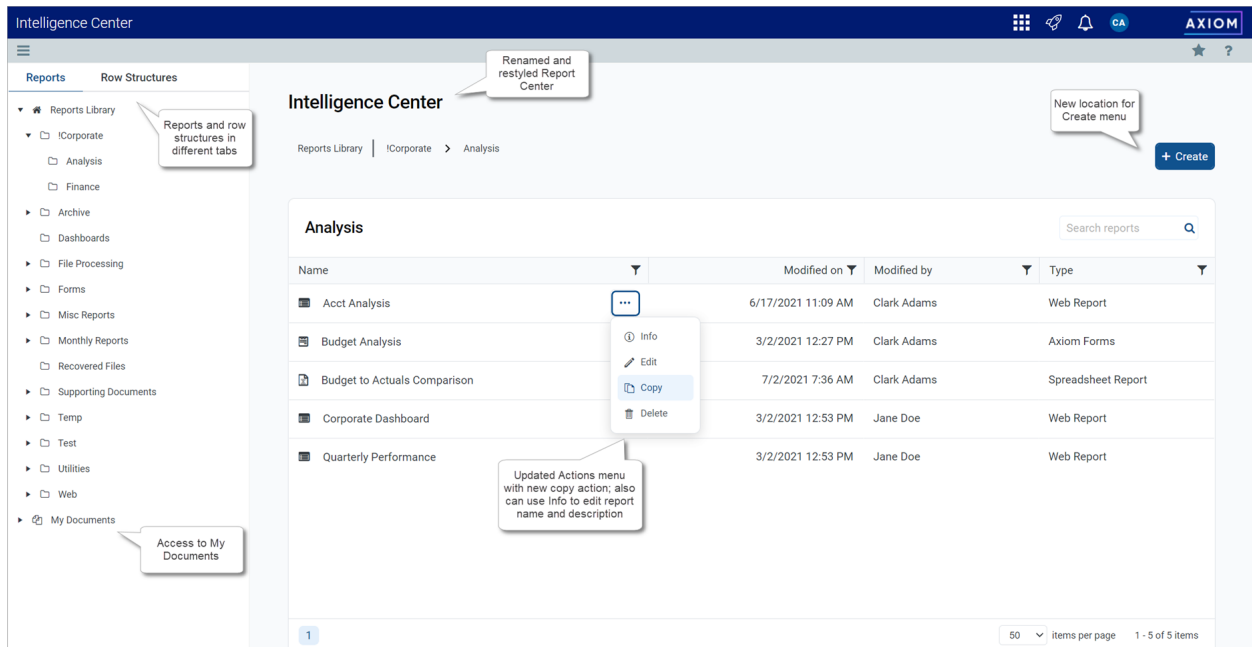
This section provides an overview of the features and enhancements in this release.

▶ Report Center / Intelligence Center enhancements

The Report Center is now known as the Intelligence Center. This change was made to better reflect the business intelligence provided by Axiom's entire suite of reporting options. Additionally, the Intelligence Center was enhanced so that you can now:

- Copy web reports and fixed row structures using the Actions menu
- Access reports saved in your My Documents folder, and save new web reports to this folder
- Sort and filter the Fixed Row Structures area
- View and edit report names and descriptions

Additionally, various styling updates were made to the Intelligence Center to improve the overall presentation and usability.



Various Intelligence Center enhancements

For more details on how the Intelligence Center has changed in comparison to 2021.1 behavior, please see [Web reporting differences](#).

▶ Report Builder enhancements

The Report Builder has been enhanced to provide improved usability and additional report configuration options:

- **Flexible report filtering:** You can now define multiple report filters of two types—general filters based on dimensions to impact all affected tables, or table-specific filters to impact only that table. You can also toggle filters enabled or disabled as needed.
- **Options for data display:** You can now choose whether the Report Builder displays live data or mock data when working in a report. Using mock data provides a nimble and performant builder experience, for times when you do not need to view actual data in order to configure the report. Additionally, performance was improved when working with live data, so that you can build reports with the advantage of swift data presentation as needed.
- **Enhanced table/column search:** When searching for tables and columns to include in the report, you can now target your search by table name and by column name to more easily find what you are looking for.
- **Additional usability enhancements:** You can now clone columns and column groups to more easily build out reports with many columns, and you can now use "save as" to save a copy of the current report from within the Report Builder

Additionally, various styling updates were made to the Report Builder to improve the overall presentation and usability.

The screenshot displays the Axiom Report Builder interface. The main report area shows a table titled "Budget to Actuals | Revenue by WorldRegion" with data for Q1 and Q2 2020. The table includes columns for WorldRegion, Q1 Actuals, Q1 Budget, Difference, Q2 Actuals, Q2 Budget, and Difference. The data is as follows:

WorldRegion	Q1 2020			Q2 2020		
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference
Asia	\$6,989,316	\$5,416,397	29.04%	\$5,939,730	\$5,334,331	11.35%
Europe	\$473,158	\$340,531	38.95%	\$389,618	\$335,371	16.18%
North America	\$32,766,656	\$35,609,235	-7.98%	\$26,180,604	\$35,068,189	-25.34%
Revenue Total	\$40,229,130	\$41,366,163	-2.75%	\$32,509,952	\$40,737,891	-20.20%

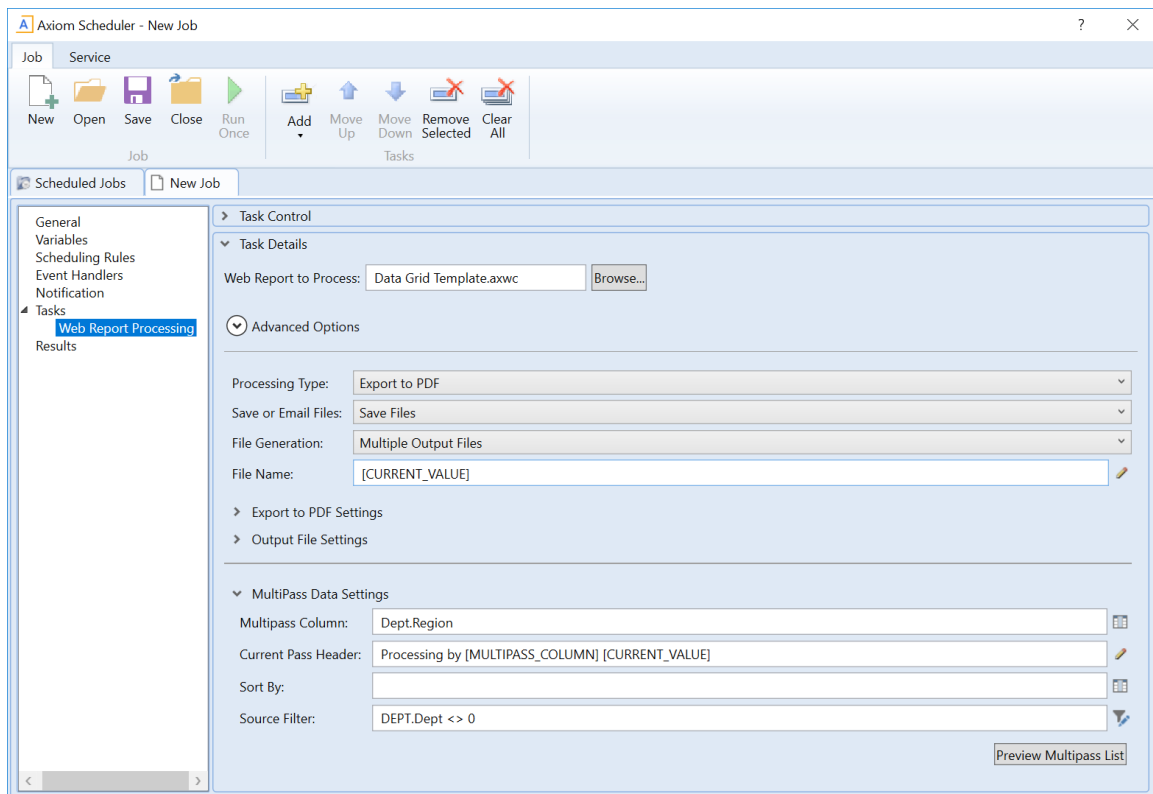
The interface also features a "Data Context" panel on the left with search options for tables and columns. The "Report Configuration" panel on the right allows for setting the report title, subtitle, and data options (Live data with manual refresh, Live data with auto refresh, or Mock data). Callouts highlight features like "Enhanced search for tables and columns", "Save current report or save a copy as a new name", "Define general report filters and table-specific filters", and "Data options for report creation".

Various Report Builder enhancements

For more details on how the Report Builder has changed in comparison to 2021.1 behavior, please see [Web reporting differences](#).

► File processing enhancements for web reports and collecting PDF files

- Web reports can now use multipass processing in order to process the reports by a dimension, generate a filtered PDF or Excel file per pass, and then dynamically save or email the output. This phase one of production reporting for web reports is limited to reports created from a product-delivered template, with planned support for ad hoc reports in an upcoming phase two. To process web reports, use the new Scheduler task named **Web Report Processing**.



New Scheduler task to process template-based web reports

- File collect processing can now collect multiple PDF files into a PDF "report book" and then dynamically save or email the output. This functionality uses the existing File Collect option of File Processing, and is set up the same way as the existing functionality to collect Excel files. The File Collect configuration sheet contains a new option that specifies whether processing collects Excel files or PDF files. Existing File Collect configuration sheets do not have this option and will continue to collect Excel files—you must add a new File Collect configuration sheet in order to use the new option.

1	2	3	B	C	D	E	F	G	H
		1	FILE COLLECT CONFIGURATION						
		8	Package name (Optional)	Common Files			Monthly Report Package		
		9	Active				On		
		10	Source File Type (Excel or PDF)				PDF		

New option to specify whether you are collecting Excel files or PDF files

► Conditional process assignments for plan file processes

Plan file processes now support the ability to define conditional process assignments for a step. This new feature provides increased flexibility to dynamically apply assignments based on various conditions that might impact plan files in a process.

When using conditional assignments:

- You define two or more condition / assignment pairs for the step.
 - Conditions can be based on the plan code table, such as to define different assignments based on the value in a DepartmentType column or based on the value in a Total column.
 - Assignments can be users, roles, or columns.
- When a plan file becomes active in the step, the plan file is tested against the defined conditions in the order they are listed on the step.
 - If a plan file meets a condition, the corresponding assignment is applied to that plan file. No further conditions are tested.
 - If a plan file does not meet any conditions, then the plan file skips the step.

In the following example screenshot, the plan file will be assigned to the Managers role if the value in the total column is under 5,000, and assigned to the Finance role if the value is over 5,000.

Step Properties	Assignments	Step Notifications	
Assignment Type: Conditional Assignment			
Conditional Assignments Edit Condition + Add Condition X Delete Condition ▼ Down ▲ Up			
Condition Name	Assignment Type	Assignment	Condition Filter
Baseline	Role	Managers	CapitalRequest.Total < 5000
OverBaseline	Role	Finance	CapitalRequest.Total >= 5000

Example conditional assignment on a step in a plan file process

► Miscellaneous enhancements

- When exporting a web report to PDF or Excel, the export now honors changes made to the report in the current session, such as filtering, sorting, and drilling.
- Imports now support importing data from a BAI2 file, which is a specialized file format used for electronic cash management balance reporting.
- Variables can now be used in the **File filter** field of a multi-file import. For example, the variable could be used to only match files with a specific date or keyword in the file name.
- Echo tasks can now be used to control jobs with sub-jobs. If an Echo task is configured to wait for sub-jobs to complete, then the Echo task will inherit the status of the completed sub-jobs, meaning the Echo task will fail if any sub-jobs fail. By default, this will stop the job from processing any subsequent tasks that may depend on the results of the sub-jobs.
- Scheduler job results in the Desktop Client can now be copied and pasted to the clipboard as needed. As part of this change, the font used to display the results is now a monospace font, so the appearance of the results is slightly different than in previous versions.
- Import error files are now automatically deleted after 15 days, so that these files do not need to be manually deleted. The number of days can be adjusted using the system configuration setting **ImportErrorsDocumentRetentionDays**.

What to know before upgrading

This section details the upgrade considerations and technical changes that apply when upgrading to version 2021.2. Please make sure to review this section carefully before upgrading.

Upgrade considerations

The following upgrade considerations apply when moving from the most recent Axiom release of 2021.1 to the new release of 2021.2. If you are upgrading from an earlier version, please also see the release notes for the interim versions for any additional upgrade considerations.

User experience changes to Report Center and Report Builder

Description As part of the ongoing development of our web reporting functionality, various changes were made that impact the existing user experience of the Report Center and the Report Builder. None of these changes remove functionality.

Notes for testing and review For more information on these changes, see [Web reporting differences](#).

Deprecation of Scheduler task Execute SQL Command

Description The Scheduler task Execute SQL Command is now considered to be a deprecated feature. Although this task is still present in the software, it should no longer be added to any new Scheduler jobs, as we plan to remove the ability to add this task in a future release.

When the task is fully deprecated, any existing Scheduler jobs with the task will continue to work, and those tasks can continue to be edited. However, if you are using this task in existing jobs, its use should be re-evaluated as some future versions of Axiom may not support executing the task.

Notes for testing and review Although there are no changes to the software at this time, we recommend that your Axiom administrator review the Scheduler jobs in use at your organization to determine if any jobs use the Execute SQL Command task. If the task is in use, we recommend evaluating it to determine if alternative features can be used instead.

NOTE: Generally speaking, only custom clients need to perform this review. If your system uses installed products, there is no need to perform this review unless your system uses custom Scheduler jobs in addition to the product-delivered jobs.

Installation and technical changes

There are no installation or technical changes to note for version 2021.2.

Web reporting differences

As part of the continuing efforts to enhance Axiom's web reporting features, the following display and behavior changes were made to existing functionality in the Report Center and Report Builder in version 2021.2.

▶ Report Center / Intelligence Center

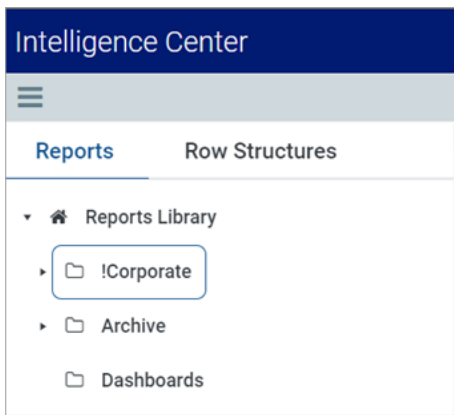
- Various naming changes were made to the Report Center:
 - The Report Center is now known as the Intelligence Center. This name change is automatically reflected on all menus except for custom client Navigation panels.

If your Navigation panel contains a Report Center command (or the older Report Designer command), this command still navigates to the Intelligence Center. To update your Navigation panel for the current naming, you can edit your copy of `WebClientNavigationPane.axl` to use the new Intelligence Center command, or you can "start over" by copying and renaming the default `Platform.WebClientNavigationPane.axl` file. For more information, see the following topic in Axiom Help: *Defining content for the Web Client Navigation panel* (AX1464).
 - Axiom Intelligence reports are now known as *visualization reports*. On the **Create** menu, the option to create a new Axiom Intelligence report is now named **Create new visualization**. This name change is also reflected in the File Type column.
 - The File Type column has also been updated so that Axiom spreadsheet-based reports are now listed as **Spreadsheet Reports** (instead of the previous term Desktop Reports).
- When you create or open a web report or fixed row structure from the Intelligence Center, it now opens in the same tab instead of a new tab. Other file types continue to open in a new tab.

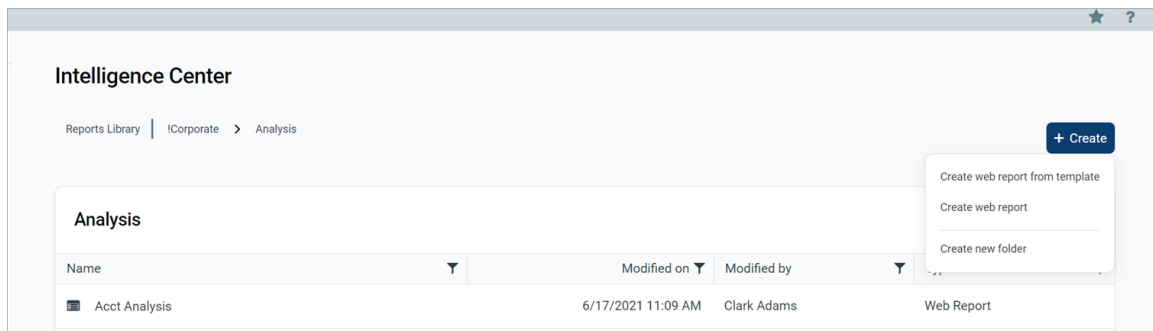
- Actions are now available from a menu in the **Name** column, instead of in a separate Actions column. To access the Actions menu, hover your cursor over the row so that the three-dots icon appears in the Name column (to the right of the name), then click the icon to open the menu.



- The left-hand panel has been reorganized into two tabs. The **Reports** tab is where you access the Reports Library and My Documents (if applicable), and the **Row Structures** tab is where you access fixed row structures.



- The **Create** button has moved from the top left to the top right of the page. Additionally, the following changes were made to the Create button:
 - The "create new folder" icon has been removed, and the option to **Create new folder** is now available from the Create button menu. The feature to create a new folder otherwise works the same way as before—it creates a new folder within the current folder location.
 - The Create button is now context sensitive, based on whether you are in the Reports area or the Row Structures area. Because creating fixed row structures is the only create action available for the Row Structures area, clicking the Create button in that area directly creates a new fixed row structure instead of opening a menu.



- If a user does not have access to the Excel or Windows Client, any non-web files are now hidden in the Intelligence Center because the user does not have any way to view these files.

▶ Report Builder

- The **Live Updates** toggle is no longer present. The data display options are now configured in the **Report Configuration** properties. You can choose to view live data with manual updates, live data with automatic updates, or mock data. By default, the Report Builder displays live data with manual updates, and you can use the **Refresh Data** button to update data after making a configuration change that affects the data in the report.
- The **Data Filter** option in the **Grid Configuration** properties has been replaced by **Report Filters** in the **Report Configuration** properties. When you upgrade, any existing grid-level filter is automatically converted to a general report filter.

NOTE: If you have an existing grid-level filter that is based on a column in a data table instead of on a reference table, this filter will cause an error in the report when attempting to apply it as a general filter. In this rare case, you must delete the upgraded filter, and then re-create it as a table-specific filter.

- The delete icon (X) that used to display on column boxes in the Report Builder has been replaced with a three-dots icon. To remove a column from the report, click the three-dots icon and then click **Delete** from the menu.

Refresh Data Save Preview

Budget to Actuals | Revenue by WorldRegion

Through June 2020

WorldRegion

Click 3-dots icon to delete or copy

Q1 2020

Q1 Actuals Q1 Budget Difference

Q2 2020

Q2 Actuals Q2 Budget Difference

Existing grid-level filters will be converted to report-level filters

WorldRegion	Q1 2020			Q2 2020		
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference
Asia	\$6,989,316	\$5,416,397	29.04%	\$5,939,730	\$5,334,331	11.35%
Europe	\$473,158	\$340,531	38.95%	\$389,618	\$335,371	16.18%
North America	\$32,766,656	\$35,609,235	-7.98%	\$26,180,604	\$35,068,189	
Revenue Total	\$40,229,130	\$41,366,163	-2.75%	\$32,509,952	\$40,737,891	

1 - 3 of 3 items

Report Configuration

Title: Budget to Actuals

Secondary title: Revenue by WorldRegion

Subtitle: Through June 2020

Report description: Budget to Actuals comparison

Report filters: Add

Revenue ✎ 🗑️

Report data:

Live data with manual refresh

Live data with auto refresh

Mock data

New data display options for the report builder

Report Builder differences

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 administrator 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).

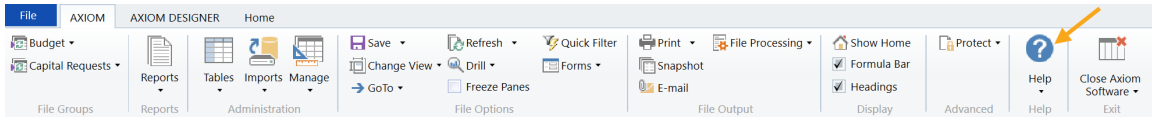
IMPORTANT: Although Syntellis strives to maintain backward-compatibility with each release, any upgrade has the potential to interrupt system functionality. The [Upgrade considerations](#) section details known impacts to existing functionality, however, other impacts may be unforeseen at the time of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



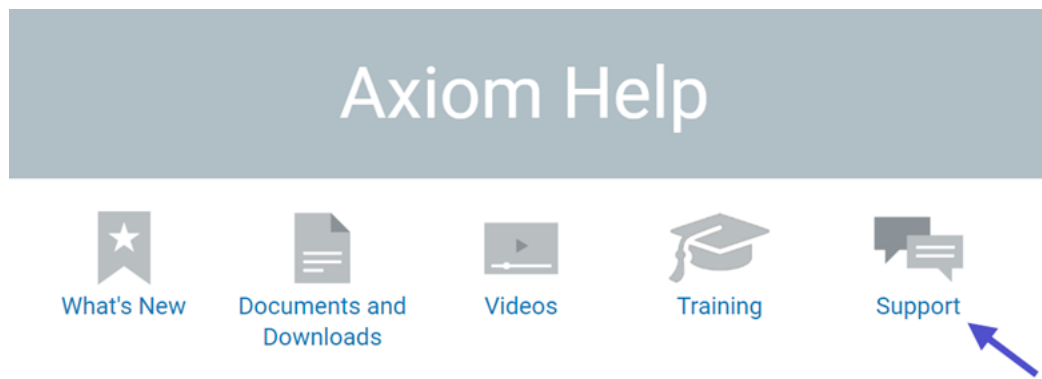
- **Web Client:** Click the question mark icon (?) in the top right of the gray task bar.



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 2021.2, 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.



Appendix: Version 2021.2 Patches

This section details the fixes and enhancements in patch releases for Axiom version 2021.2. 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: 2021.2.15

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.

Additionally, this patch contains improvements to database upgrade behavior for cloud systems.

▶ Patch 2021.2.14

The following issues were fixed in this patch:

- 113616: If a plan file is activated in a plan file process and skips all steps, it is not possible to re-activate the plan file in the process after the assignment issue is resolved. NOTE: This fix prevents the issue from happening to newly activated plan files, but will not address any existing plan files in this error state.
- 115243: Reports with many GetData functions may experience slower performance than expected.
- 116450: The OData API may sometimes fail to load on cloud systems after upgrade to the previous patch.

▶ Patch 2021.2.13

The following issues were fixed in this patch:

- 112700: If a web report using fixed rows and built from template is drilled, and the drill results exceed one page, the paging controls are missing to view the remaining pages.
- 112867: Exporting web reports may fail with a server 500 error.

Additionally, this patch contains the following enhancements:

- Logging and error message improvements to assist troubleshooting imports and save-to-database.
- Performance improvements for the OData API, including data paging. This paging uses the standard OData nextpage syntax. The page limit is controlled by the system configuration setting `ODataPageSize`, which is set to 100,000 by default.

NOTE: Any custom solution using the OData API must be able to follow the OData nextpage links in order to consume all of the returned data. If an existing custom solution is not designed to follow the nextpage links, and it is not feasible for you to modify the custom solution, you can modify the `ODataPageSize` system configuration setting so that all returned data is present on a single page.

▶ Patch 2021.2.12

This patch contains translation updates.

▶ Patch 2021.2.11

This patch contains updates to the data query engine and styling updates.

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