

Release Notes

Axiom

Version 2021.3

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

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About the release notes

Syntellis is pleased to announce the release of **Axiom Version 2021.3**. 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

These release notes cover the changes in the version 2021.3 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

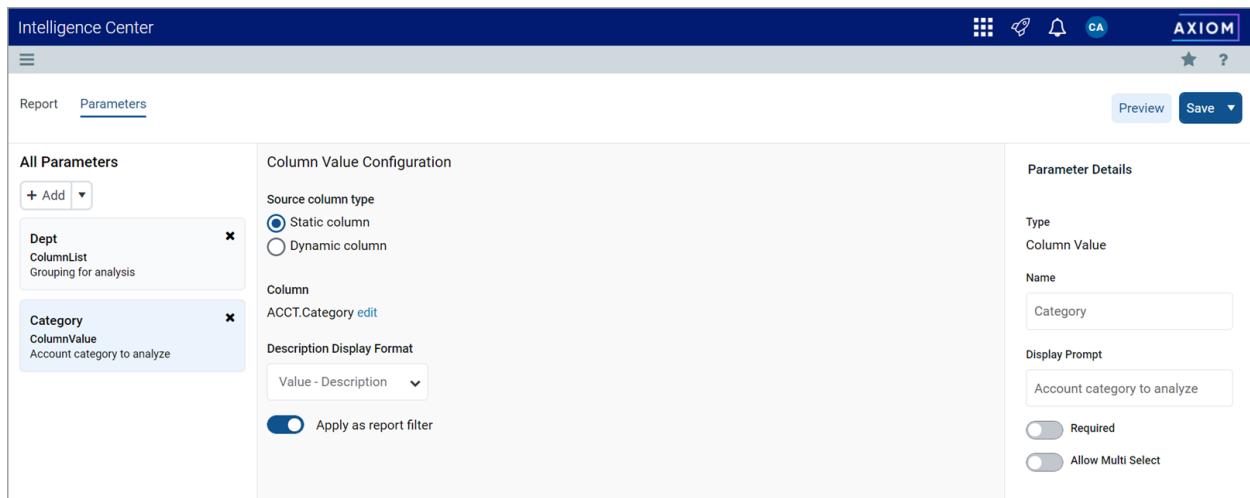
This section provides an overview of the features and enhancements in this release.

► Dynamic grouping and filtering for web reports

You can now configure web reports for dynamic grouping and filtering using *report parameters*. Report parameters allow end users to interact with the report and do one or both of the following:

- Change the grouping level (also known as row dimension) of the report by selecting from a predefined list of columns. For example, users can dynamically change the report to be grouped by regions, vice presidents, entities, or departments.
- Apply a filter to the report by selecting one or more values from a specified column. For example, users can filter the report by a specific account category, department, or entity, so that the report shows data for the selected value or values.

The Report Builder now supports defining and configuring report parameters to create the dynamic behavior. When users view a report with defined parameters, the parameter choices are presented in a panel within the report. Users can interact with the panel to make parameter selections and apply them to impact the data shown in the report.



Example report parameter configuration in the Report Builder

Report Parameters

Grouping for analysis: VP

Account category to analyze: Revenue

Clear Apply

Budget to Actuals
Through June 2020

VP	Q1 2020			Q2 2020		
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference
Bree Sigman	\$6,015,031	\$6,954,348	-13.51%	\$6,437,818	\$6,848,978	-6.00%
Evan Simpson	\$12,810,352	\$13,195,690	-2.92%	\$5,298,342	\$12,995,756	-59.23%
Frank Martinez	\$161,693	\$331,567	-51.23%	\$262,089	\$326,543	-19.74%
Javier Grant	\$5,018,848	\$4,165,304	20.49%	\$4,119,925	\$4,102,194	0.43%

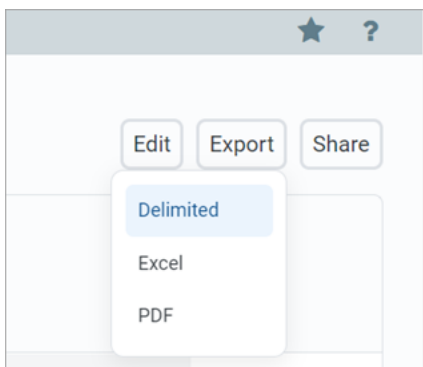
Example web report with report parameters—end user view

For more information, see the following topic in Axiom Help: Using report parameters in web reports (AX1687).

► Expanded export options for web reports

The following enhancements were made to the export feature for web reports:

- You can now export web report data to a delimited file, using delimiters such as comma, space, period, tab, and pipe. If the delimiter is a comma, the file format for the exported file is CSV. For any other delimiter, the file format is TXT.



- When exporting as an Excel file or a delimited file, you can choose to "flatten" the data so that it shows all drilling levels. This option is available when the report is configured for directed drilling. For example, if the report shows rows summarized by Acct and is configured to drill to WorldRegion > Region > Dept, the exported data will be flattened to contain rows summarized by Acct/WorldRegion/Region/Dept.

Configuration Settings

Export all drill levels

Delimiter

Comma ▼

- When exporting to PDF, you can now specify the margin size as None, Narrow, or Normal. You can also define headers and footers for the PDF, including variables to display the current page number and total pages.

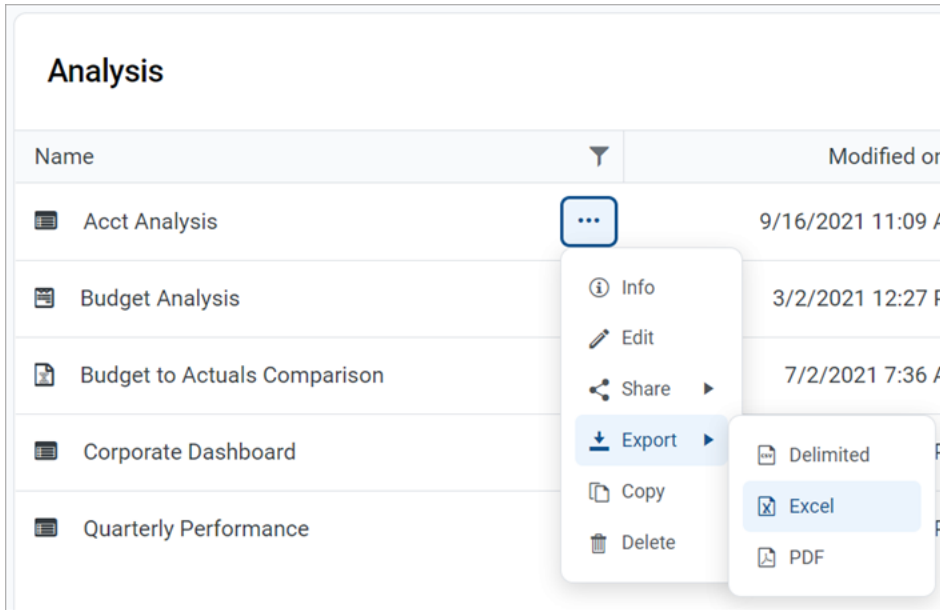
Layout Letter ▼ Orientation Portrait ▼

Margin Normal ▼

Header My Report ✕ ▼ Alignment Center ▼

Footer Page {page_number} of {total_pages} ✕ ▼ Alignment Center ▼

- You can export web reports from the Export button in the report, or use the expanded Actions menu in the Intelligence Center.



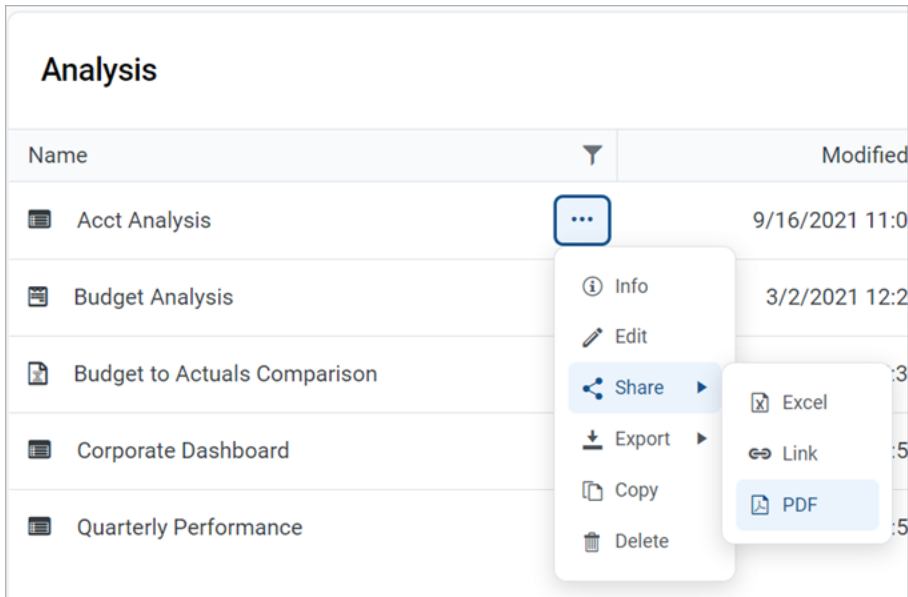
For more information, see the following topics in Axiom Help:

- Exporting grid data in a web report to a delimited file (AX1677)
- Exporting grid data in a web report to Excel (AX1842)
- Exporting a PDF copy of a web report (AX1841)

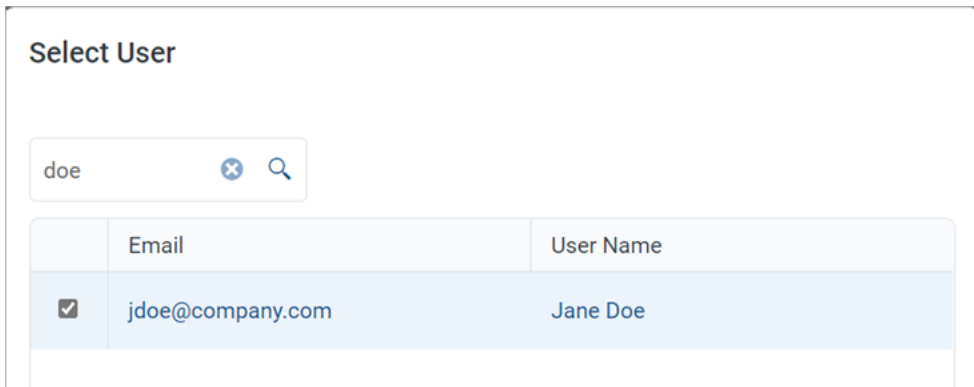
► Share web reports with other users

You can now easily share web reports with other users via an Axiom-generated email. When sharing, you can:

- Send another user a link to the "live" web report in the application, or attach an exported PDF or Excel copy of the report.



- Look up user names and send the email based on the user's email address stored in Axiom.



- Customize the subject and body text as needed to let the user know why you are sharing the report with them.

E-mail

To: +

Cc: +

Bcc: +

Subject:

Acct Analysis.pdf

Attached is the account analysis report we discussed.

You can share web reports from the Share button in the report, or use the expanded Actions menu in the Intelligence Center. For more information, see the following topic in Axiom Help: Sharing a web report via email (AX1678).

► Report on plan file process information in web reports

You can now include plan file process information in web reports, to report on the current status of plan files or provide process statistics such as time in step. The Report Builder has been enhanced to support this as follows:

- To report on process information, you associate the report with a file group or file group alias in the Report Configuration settings. Additionally, the primary table for the report must be the plan code table for the file group.
- Once the report is associated with a file group, a set of process management columns become available for use in the report. You can report on current step information, or process history and statistics.
- The report returns process information for the designated plan file process for the file group.

The screenshot displays the Axiom Report Builder interface. On the left, the 'Data Context' sidebar shows a tree view under 'Process Management' with columns like 'Process Status', 'Current Step', and 'Current Step Number'. The central area shows a report preview titled 'Process Status Report' with a table of data. The table has columns: Dept, Process Status, Current Step, and Current Step Number. The data rows include various departments and their statuses, all showing 'Active' and 'Budget Development' as the current step. On the right, the 'Report Configuration' sidebar allows setting the title to 'Process Status Report', adding a subtitle, and configuring report filters and data refresh options (Live data with manual refresh, auto refresh, or Mock data).

Dept	Process Status	Current Step	Current Step Number
Arizona Distribution - 76500	Active	Budget Development	1
Arizona Warehouse - 74500	Active	Budget Development	1
Asia Distribution - 50500	Active	Budget Development	1
Asia Warehouse - 54500	Active	Budget Development	1
Atlanta - Store 52 - 51000	Active	Budget Development	1
Baltimore - Store 122 - 81000	Active	Budget Development	1
Beijing - Store 100 - 78000	Active	Budget Development	1
Birmingham - Store 105 - 81500	Active	Budget Development	1
Boise - Store 128 - 94500	Active	Budget Development	1
Boise Warehouse - 95000	Active	Budget Development	1

Example Report Builder features to report on process information

For more information, see the following topic in Axiom Help: Reporting on process information in web reports (AX1585).

► Robust date formatting options for web reports

Web reports now support robust formatting options for Date and DateTime columns. The Report Builder has been enhanced to support this as follows:

- You can specify whether you want to show the full date or date-time, or whether you want to show a specific "part" of the date or date-time. For example, you can show just the year, quarter, month, day, week, or hour.
- Full dates and date-times can be displayed using various formats, such as 1/1/2020, January 1, 2020, or Jan 2020. You can also define a custom format for the date or date-time.
- When showing a part of the date, various parts also have formatting options. For example, the quarter can be shown as 1 or Q1, and the day can be shown as 1, Sun, or Sunday.
- Date parts can also be shown for the fiscal year when the fiscal year and calendar year are different. For example, you can show the fiscal year, fiscal quarter, and fiscal month.

Date part to retrieve

Quarter ▼

Quarter format

Q1 ▼

Example date formatting options for date and date-time columns

For more information, see the following topic in Axiom Help: [Configuring column properties for a web report \(AX1835\)](#).

▶ Additional Report Builder enhancements

The Report Builder features several additional enhancements for usability and to support additional report configurations:

- **Edit button on report viewer:** You can now edit a web report directly from the report viewer, instead of needing to return to the Intelligence Center first. If you have read/write access to the report, an **Edit** button displays in the top right corner, which you can click to enter the Report Builder and edit the report.

The screenshot shows the 'Intelligence Center' header with navigation icons and the 'AXIOM' logo. Below the header, there are 'Edit', 'Export', and 'Share' buttons. An orange arrow points to the 'Edit' button. The main content area displays a report titled 'Budget to Actuals | Corporate' for 'Through June 2020'. The report contains a table with columns for 'WorldRegion', 'Q1 2020' (Actuals, Budget, Difference), and 'Q2 2020' (Actuals, Budget, Difference). The data row for 'Asia' shows values: \$6,989,316 (Actuals), \$5,416,397 (Budget), 29.04% (Difference), \$5,939,730 (Actuals), \$5,334,331 (Budget), and 11.35% (Difference).

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%

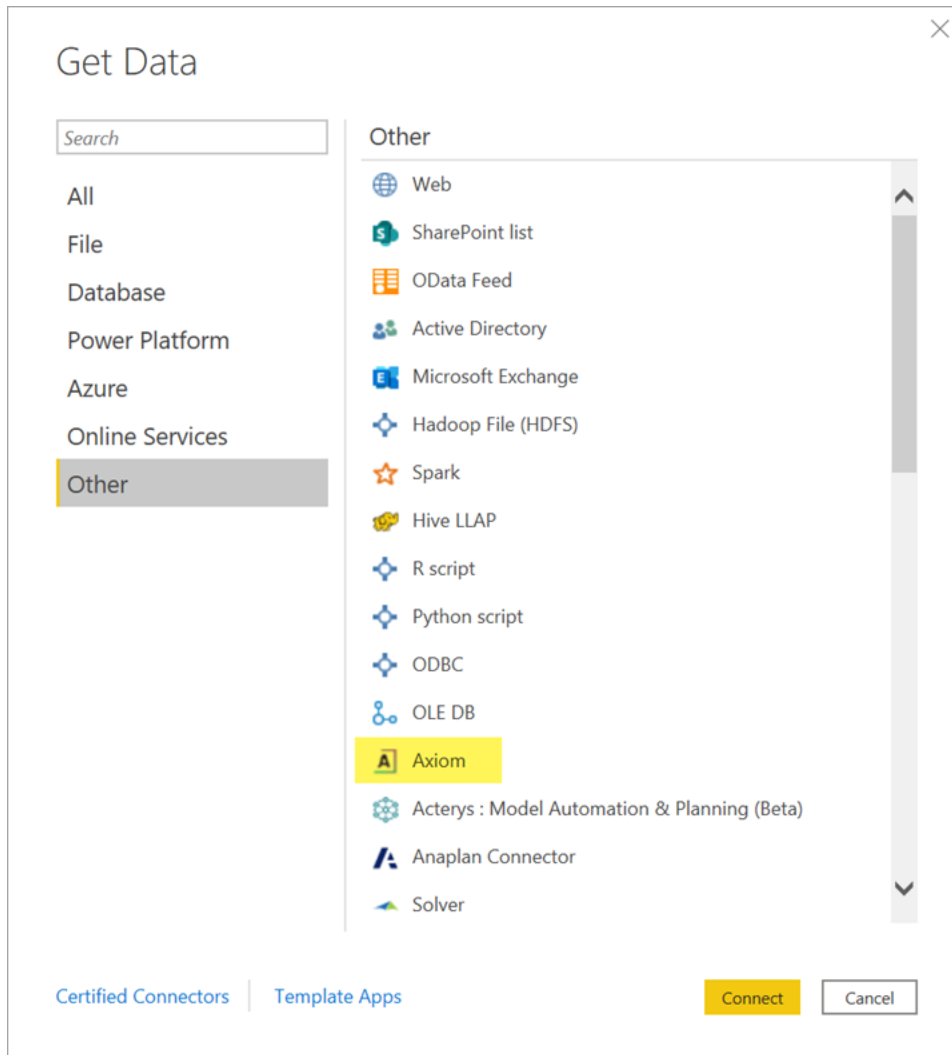
Example Edit button to edit the web report

- **Sorting options:** You can now optionally specify which columns in the report to sort by, or continue to use the default sorting behavior. For more information, see the following topic in Axiom Help: [Configuring grid properties in a web report \(AX1836\)](#).
- **Additional report grouping configurations:** When the primary table of the report is a reference table, you can now specify columns from related tables as row dimension columns (referred to as *upstream grouping columns*). This report configuration is especially useful for certain products where data is primarily stored within reference tables. For more information, see the following topic in Axiom Help: [Using upstream grouping columns as row dimensions in web reports \(AX1686\)](#).

- **Edit report titles in-place:** You can now edit the report titles in-place within the report canvas, which makes it easier to visualize the title options. For more information, see the following topic in Axiom Help: Defining report titles and description for a web report (AX1834).

▶ Axiom Power BI Connector

The Axiom Power BI Connector is now available to easily view and work with your Axiom data within Microsoft Power BI Desktop. Once you have installed the connector locally, you can access your Axiom system to download data into Power BI Desktop for visualization and analysis.



Example Axiom Power BI Connector in Microsoft Power BI Desktop

The Axiom Power BI Connector uses the OData API to connect to Axiom data. This release also includes performance enhancements for the API, to better handle large amounts of data. (Note that these performance enhancements were also made available in a 21.2 patch.) The OData API must be enabled for your system in order to use the Axiom Power BI connector.

For more information, see the following topic in Axiom Help: Using the Axiom Power BI Connector (AX1679).

What to know before upgrading

This section details the upgrade considerations and technical changes that apply when upgrading to version 2021.3. 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 2021.2 to the new release of 2021.3. If you are upgrading from an earlier version, please also see the release notes for the interim versions for any additional upgrade considerations.

OData behavior change

Description

Table data returned by the OData API is now paged for performance reasons. 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 records by default.

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.

NOTE: This behavior change was also made available in patch 2021.2.13. If you are currently running this version or later, then you already have this change and the upgrade consideration does not apply.

Notes for testing and review

If your organization has a custom solution that uses the OData API, and this solution queries datasets that could conceivably exceed the `ODataPageSize`, then you should review and test the solution after upgrade to verify that it can follow the nextpage links to retrieve all data. For ease of testing, you may want to temporarily change the `ODataPageSize` to a smaller number so that you can run the test on a small dataset yet still verify the paging behavior.

Deprecation of Scheduler task Execute SQL Command

Description	<p>The Scheduler task Execute SQL Command is now considered to be a deprecated feature. This task is no longer available to be added to Scheduler jobs.</p> <p>If you have an existing job with an Execute SQL Command task, this task will continue to work and can 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.</p>
Notes for testing and review	<p>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.</p> <p>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.</p>

Installation and technical changes

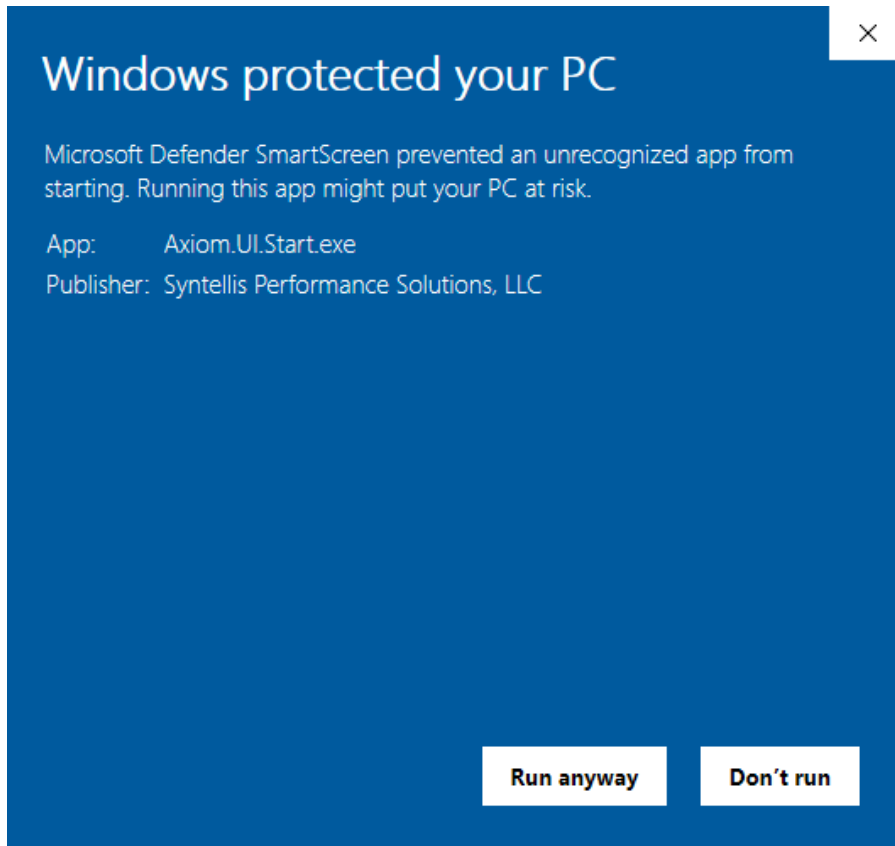
► Updated publisher certificate

NOTE: As of patch 2021.3.17, the certificate behavior described in this section only applies to on-premise clients. An organization-validated certificate is provided for Axiom Cloud clients, which eliminates the need for any manual intervention regarding the certificate.

This release 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.



► Removal of official support for certain older versions

The following items are no longer officially supported for use with Axiom:

- Microsoft Windows Server 2016
- Microsoft Internet Information Services (IIS) 8
- Microsoft Excel 2013
- Microsoft Windows 8.1

These are all older versions that are no longer commonly used by our client base.

Please note that at this time we have not made any changes to Axiom that would cause it to stop operating in these older versions. If you do happen to be using one of these versions, 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 software versions. Because future releases may introduce breaking changes for these older versions, we strongly recommend discontinuing their use with Axiom as soon as it is feasible.

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).

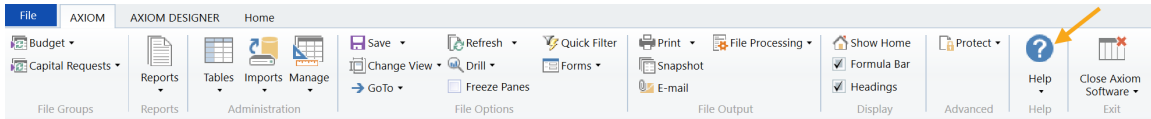
IMPORTANT: Although Syntellis strives to maintain backward-compatibility with each release, any upgrade has the potential to interrupt system functionality. The [Upgrade considerations](#) section details known impacts to existing functionality, however, other impacts may be unforeseen at the time of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



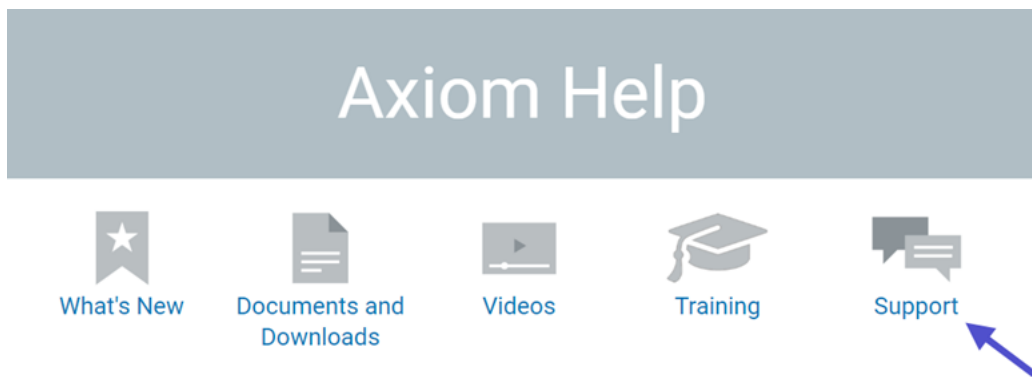
- **Web Client:** Click the question mark icon (?) in the top right of the gray task bar.



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 2021.3, 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 2021.3

The following issues were fixed in version 2021.3.

Item	Description
12147	<p>Issue: The My Documents folder doesn't get created for a user if the user is granted the User Documents Folder permission after they have already logged in.</p> <p>Status: The My Documents folder is now created for a user if they log in with the permission and the folder does not already exist.</p>
73634	<p>Issue: When using an export to a remote database, the connection test may fail due to a TLS version error.</p> <p>Status: This error should no longer occur.</p>
91308	<p>Issue: In web reports, if negative values are configured to use red font, this format is not applied to negative values in the total row.</p> <p>Status: The total row now honors the negative format.</p>

Appendix: Version 2021.3 Patches

This section details the fixes and enhancements in patch releases for Axiom version 2021.3. 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: 2021.3.21

The following issues were fixed in this patch:

- 145097: Fixed potential duplication error when using OData pagination.

▶ Patch: 2021.3.20

The following issues were fixed in this patch:

- 149472: Fixed an issue that occasionally threw (502) Bad Gateway errors when executing scheduled ETL imports.
- 148888: You can now use conversions with GETDATA and calculated columns without getting an error.
- 148461: Scheduled jobs configured for a specific time zone are now re-scheduled based on that timezone.

148460: Updated the code signing certificate for on-premise installations. Please install the updated certificate before opening the desktop clients.

▶ Patch: 2021.3.19

The following issues were fixed in this patch:

- 138457: Imports with transformation steps against partitioned tables may fail with a SQL error.
- 138987: If a GetData function or datalookup is configured to return DistinctCount, the values are not correct. It is returning 1 instead of the count of unique values.
- 139123: If an Axiom query is configured to sort on a calculated field, the query fails with an "invalid column" error.

► Patch: 2021.3.18

The following issues were fixed in this patch:

- 134219: If a composite plan file part errors while the plan file is being archived, the archive is created anyway even though it doesn't contain all of the parts.
- 134354: In the Windows Client, if an Axiom query is configured to use spreadsheet sorting but the query does not return any data, and content is present on the row with the stop tag, the start and stop tags are sorted which causes them to become flipped.
- 135979: The Odata next page link is not being generated in the correct format for all systems.

► Patch 2021.3.17

This patch provides an organization-validated publisher certificate for Axiom Cloud systems. As of this patch, Axiom Cloud clients no longer need to perform any manual activities to update or install the Axiom certificate on end user machines. Additionally, users should no longer see the Windows SmartScreen prompt when installing the Axiom Desktop Client.

The [certificate behavior](#) is unchanged for on-premise clients.

► Patch 2021.3.16

This patch enhances the Quick Filter dialog in the Desktop Client to expand the available report configurations where dimension tables are available to create Quick Filters.

In previous releases, if a primary table of an Axiom query had multiple lookups to the same dimension table, that dimension table was omitted from the Quick Filter dialog because the paths to the table were ambiguous. As of this patch, Axiom will prioritize and use one of the lookup paths if it meets one of the following criteria (listed in order of priority), thereby causing the dimension table to become available in the Quick Filter dialog:

- A validated column on the primary table (key or non-key) has the same name as the dimension table
- The primary table has only one single-level lookup to the dimension table (regardless of how many multi-level lookups are present)
- The primary table has only one key column that looks up to the dimension table (regardless of how many other single-level non-key lookups are present)

If the spreadsheet report has multiple Axiom queries where the primary tables reference the same dimension table, the dimension table will display in the Quick Filter dialog as long as all of the primary tables meet one of these rules, so that the resulting dimension-based Quick Filter can be applied to all of the queries.

EXCEPTION: If the primary table of one of the Axiom queries is the dimension table, then the dimension table will display in the Quick Filter dialog even if the report contains an Axiom query where the primary table does not meet one of these rules. In this case, an ambiguous column error will occur if you attempt to create a Quick Filter using the dimension table. This behavior existed previously and the Quick Filter enhancement in this patch does not change it.

▶ Patch 2021.3.15

This patch contains caching optimizations to improve performance for certain Axiom configurations.

▶ Patch 2021.3.14

The following issues were fixed in this patch:

- 129323: Quick Filter doesn't show primary table as expected when table has multiple lookups to a reference table.

Additionally, this patch contains security updates.

▶ Patch 2021.3.13

The following issues were fixed in this patch:

- 125287: Web reports error if the report contains a dynamic column that is configured to show descriptions first, and the currently selected column for the parameter does not have a description column.
- 125646: In certain circumstances, lookup columns fail to expand in the Report Builder data tree.
- 125646: The option to show 500 rows per page is missing in web reports.

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

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