Web Client User Guide

Axiom

Version 2022.4

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Introduction

Axiom is an enterprise performance management application with full-featured planning and reporting functionality. Once the system has been configured to your organization's requirements, plan files and reports are made accessible to end users. This guide explains how to work with web-enabled plan files and reports that have already been created by administrators and other power users.

▶ Intended audience

This guide is intended for all users of Axiom.

▶ What is covered in this guide?

This guide covers the following:

- Introduction to the Web Client user environment, including menus and basic navigation
- How to use Axiom forms
- How to use plan file process features

▶ What is not covered in this guide?

The following related topics are not covered in this guide:

- Basics of using the Desktop Client. For more information, see the *Desktop Client User Guide*.
- Creation and use of web reports and the Report Builder. For more information, see the *Web Reports Guide*.
- Administration or file setup activities. For more information, see the other guides delivered with the system.

All documentation for Axiom can also be accessed using the Axiom Help Files.

▶ Axiom Client applications

Users interact with Axiom using either the Desktop Client or the Web Client.

Desktop Client	The Desktop Client is the general name for the Axiom application that runs on the client desktop. The Desktop Client provides access to spreadsheet-based plan files, reports, and other supporting files. The Desktop Client also provides access to full administration features for the Axiom platform, including managing security, Scheduler, tables, imports/exports, file groups, and more. There are two different versions of the Desktop Client: • **Excel Client.** The Excel Client provides access to all Axiom features within a Microsoft Excel interface. • **Windows Client.** The Windows Client uses a .NET-based engine to emulate the spreadsheet environment without requiring Microsoft Excel. It provides full access to Axiom features, but certain spreadsheet features are limited. Syntellis recommends the Windows Client as the primary client application for all users who need access to the Desktop Client. Generally speaking, use of the Excel Client should be reserved for spreadsheet file development, due to the easy access to full spreadsheet functionality.
Web Client	The Web Client provides browser-based access for Axiom, limited to certain web-enabled features. The Web Client does not provide spreadsheet functionality. Using the Web Client, end users can access browser-based plan files and reports. Certain system administration features are available in the Web Client, such as limited Scheduler, security, and table management. Various Axiom products also provide product administration features in the Web Client.

This guide discusses functionality that is available in the Web Client.

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Web Client Basics

This section discusses the basics of working with the Axiom Web Client. The Web Client is the browser-based client for Axiom. The Web Client supports cross-platform distribution of browser-based reports and plan files to users. It also provides access to a limited set of administration features for system administrators and other power users.

The Web Client does not require any software installation. The only requirement is a supported browser.

Home page

All users have a home page that opens automatically when you log into Axiom.

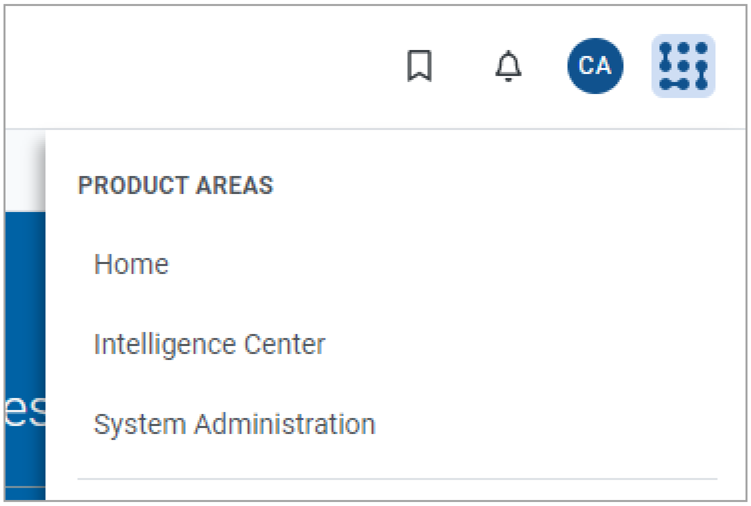
The contents of your home page may vary depending on the security roles to which you are assigned and the products to which you have access. If you have any questions about your home page, please contact your system administrator.

▶ Web Client home page

Depending on your system, the Web Client home page may be one of the following:

- A product-specific home page for an installed Axiom product
- A custom home page that was created specifically for your organization
- The default Axiom home page

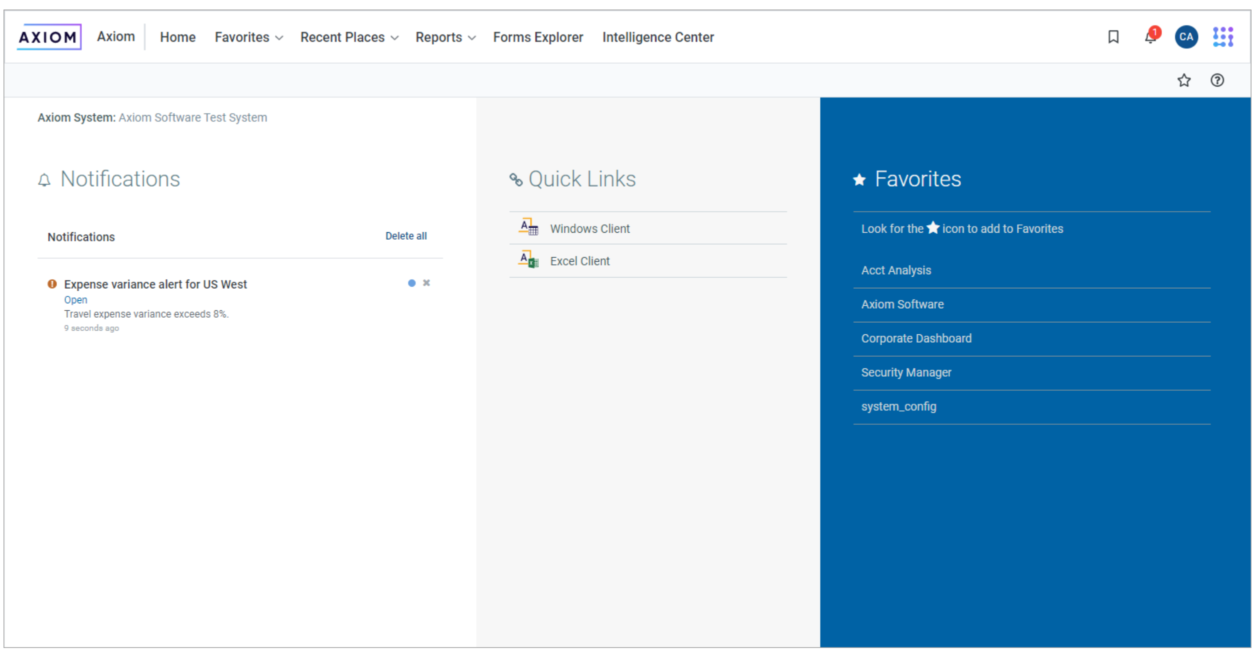
If you navigate away from the home page, you can return to it by using the Area menu in the Navigation bar:



Home option on Area menu

If you are in a system with installed products, the Area menu contains product names instead of the **Home** item. In this case, you can select a product name to return to the home page for that product.

If you do not have an assigned browser-based home page, the Web Client displays a default home page. The default home page displays notifications, favorites, and quick links.



Example default home page

All users can access this default home page by going to the following URL:

Example Cloud URL	`https://`*`ClientName`*`.axiom.cloud/Home/Launchpage`

Where *ClientName* is the name of your Axiom Cloud system.

Example On-Premise URL

`http://ServerName/Axiom/Home/Launchpage`

Where *ServerName* is the name of the Axiom Application Server, and Axiom is the default name of the virtual directory.

This page has the following features:

- **Notifications**: Read and delete notifications using the same features available in the Notifications panel.
- **Quick Links**: Use a set of global quick links that are displayed here for easy access. These links are built-in to the page and cannot be customized.

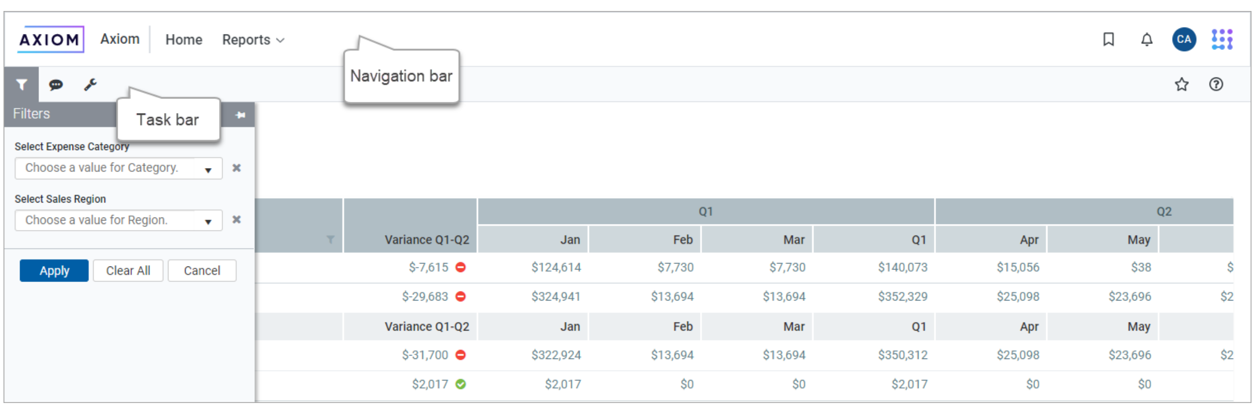
  > **NOTE:** Quick links to client applications are displayed only if you have security permissions to launch the application. If you do not have permission to any quick links,the Quick Links section is hidden on your home page.

- **Favorites**: You can open and delete web favorites.

Web Client overview

You can access mostt Web Client features and navigation using the two bars across the top of each page:

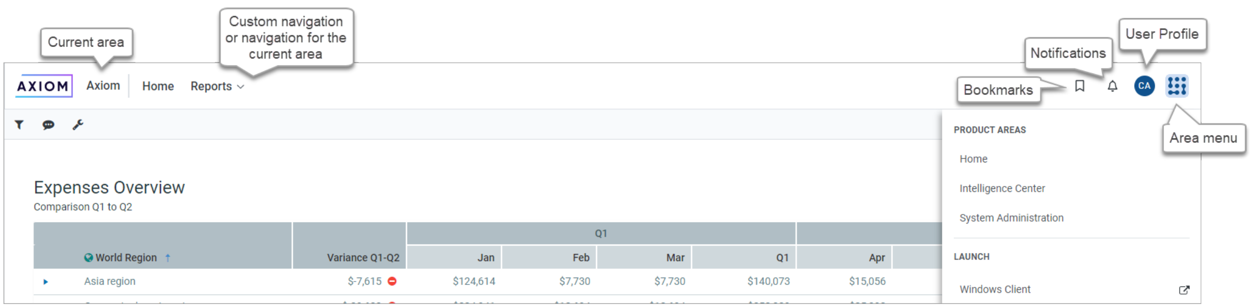
- **Navigation bar**: The bar at the top of the page provides access to product areas and global features.
- **Task bar**: The toolbar underneath it provides access to various features that are specific to the current page or document.



Navigation bar

The Web Client Navigation bar provides access to various product areas and global features. Using this bar, you can:

- Navigate to home and various product areas, including common areas such as System Administration and Intelligence Center.
- Use context-sensitive navigation for the current area, including custom navigation defined for custom systems.
- Launch various client applications.
- View alerts and notifications from various system processes and features.
- View user information, configure session settings, and log out.
- Access saved bookmarks (favorites) and recent items.



The context-sensitive navigation across the top of the page depends on the current area and the type of system that you are using.

- Common areas such as System Administration and Intelligence Center display standardized navigation for that area.
- Custom systems display custom navigation for the system or the default navigation if no customizations have been made.
- Systems with installed products display navigation for the current product area, such as Capital Planning or Budgeting.

Task bar

The Web Client Task bar provides access to various features that are specific to the current page or document. Using this bar, you can perform activities such as:

- Filter the data shown on the current page.
- Comment on the current document and review comments from others.
- Access tools relating to the current page.
- Save the current page or document as a favorite.
- View help for Axiom or for the current page.
- Perform other context-sensitive tasks such as managing attachments.

The left side of the task bar contains a task toolbar. You can click any icon in this toolbar to open the panel for the associated feature. For example, clicking the filter icon opens the Filters panel. Clicking the icon again closes the panel.

The panel can be pinned or unpinned using the pin icon in the top right of the panel. If the panel is unpinned, the panel overlays the current page contents, and clicking on the page closes the panel. If the panel is pinned open, then the form is pushed to the side so that the panel contents and the form can be viewed at the same time. When pinned, clicking the page does not close the panel — you must unpin the panel or click the toolbar icon again to close the panel.

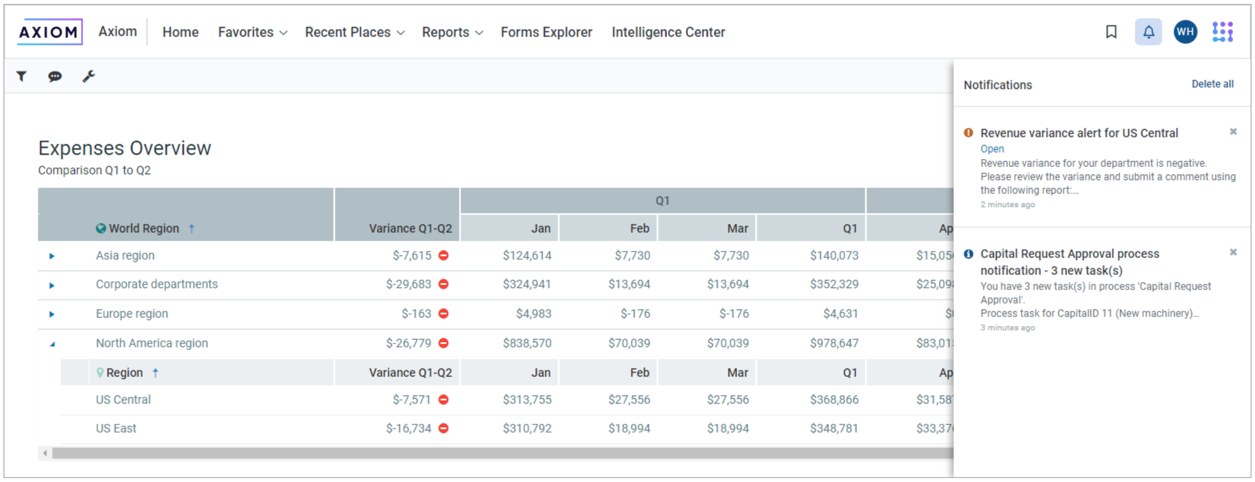
The contents of the task bar vary depending on the current page or document. For example, the Message Stream and the Filters panel are only available if they have been enabled for the current document. If a specific feature is not available for a specific document or page, it has either not been enabled or it does not apply.

Viewing notifications in the Web Client

If you receive a notification in Axiom, you can view it in the Notifications panel. Notifications can come from the following sources:

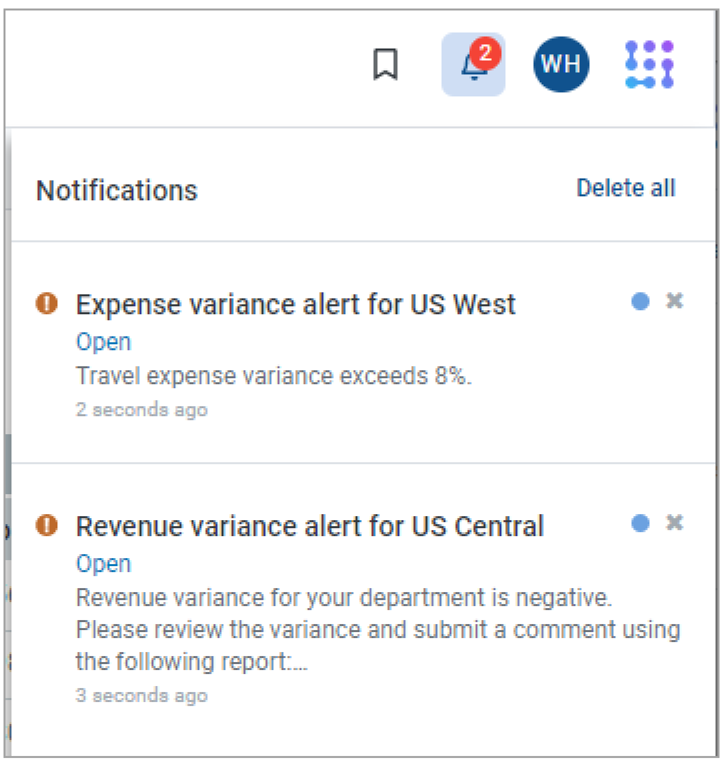
- **Alert notifications.** Your system administrators and other power users may have set up alerts to monitor certain alertable conditions and then notify specified users.
- **Process management notifications.** These notifications result from active processes in process management, such as to inform you that you have a new task in the process.
- **Message stream notifications.** If you have subscribed to a document's message stream, you will be notified of any new comments made about that document.
- **Axiom system processes such as Process Plan Files.** If you have triggered certain system processes, Axiom will notify you when the process is completed or when errors occur.
- **Scheduler jobs.** If you have run a Scheduler job manually and that job is configured to send notifications, you will be notified when the job completes or errors (depending on the notification configuration).

To open the Notifications panel, click the Notifications icon in the Navigation bar.



Example Notifications panel

If you have new notifications when you first log inor receive new notifications during a current session, a red number is displayed on the Notifications icon. In the panel, new notifications are indicated by a blue dot in the top right corner of the notification. The blue dot is removed when the notification is read or when the panel is closed.



NOTES:

- Your notifications may also be displayed on your home page. If so, the notifications can be read and managed using the same features.
- All notifications that are displayed in the Notifications panel are also available in the Notifications task pane of the Desktop Client. Both areas read from the same source of notifications and edit the same source. If you read a notification in one area or delete a notification from one area, the other area reflects these changes.

Reviewing notifications

Within the panel, notifications are listed in the order they were received with the newest notifications at the top. Notifications display the following icons to indicate their priority:

Notification with information priority.

Notification with warning priority.

Notification with error priority.

When viewing notifications in the panel, you can perform the following actions:

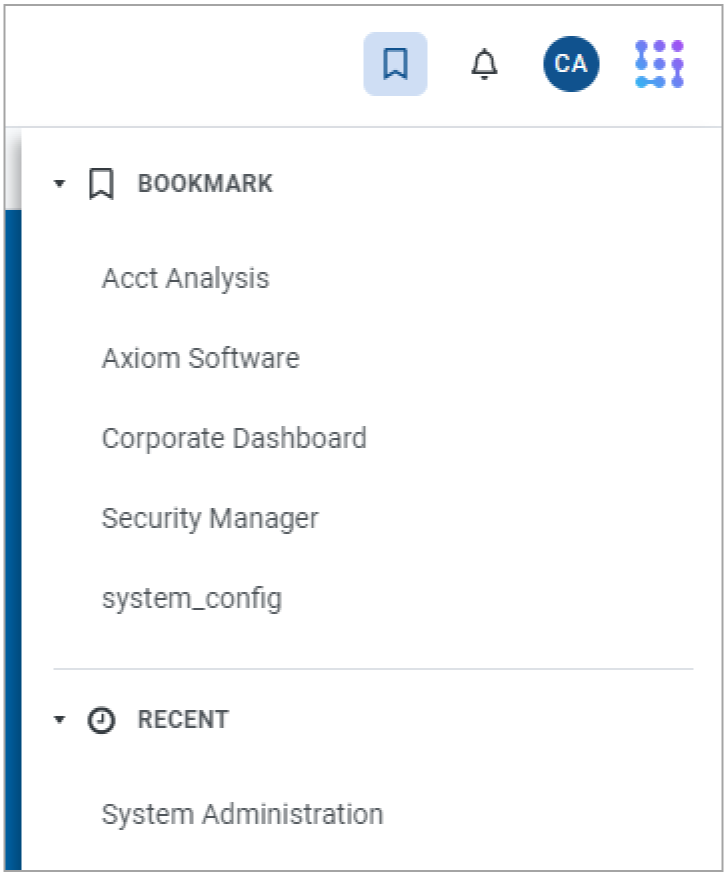
- Some notifications may have more text than can be displayed in the panel. To view the full notification text, click the notification box to open it.
- Some notifications may contain a link to a supporting document for more information. To open the document, click the **Open** link at the top of the notification box, underneath the notification title. Additionally, if the notification is for a process task in a plan file process, the notification may contain one or more links to plan files. You can click these links as needed to open the plan files.
- You can remove notifications from the panel if you no longer need them. To remove a notification, click the **X** icon in the top right of the notification box. After a notification has been removed from the panel, you cannot undo this action.

Notifications will remain in the list until you remove them, or until they are deleted by the system purge job. By default, the system purge job deletes alerts and notifications older than 60 days.

Managing favorites in the Web Client

You can save various documents and pages as favorites in the Web Client for quick access to commonly used items. Your favorites list is available in the following locations:

- The Bookmarks panel
- The default Web Client home page

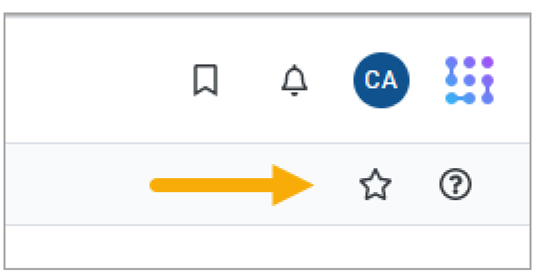


Example favorites in the Bookmarks panel

Your favorites list displays any web-enabled favorites that you have saved in the Web Client or the Desktop Client. Other types of favorites that are saved in the Desktop Client are not displayed in the Web Client (including folders that were saved as favorites, even if the folder contains web-enabled files).

▶ Saving favorites

To save the current document or page as a favorite in the Web Client, click the star icon in the right side of the Task bar. The star icon toggles from outline (not a favorite) to filled (a favorite).



Favorite icon in Web Client task bar

After you save a favorite, the document or page is displayed in your favorites list in the Web Client and in the Desktop Client. You can use the saved favorite to quickly open the document or page.

Web favorites are saved using the name in the browser tab. In Axiom forms, you can define a title that is displayed in the browser tab that is different than the file name. If the title is changed after the favorite is saved, the favorite is not updated to show the changed title (however, the favorite still opens the document or page).

Currently, the Web Client does not support the ability to rename or reorder web favorite, or to organize web favorites into folders. Web favorites are displayed as a flat list in alphabetical order. However, if you rename a favorite in the Desktop Client, the Web Client is updateds for the new name.

NOTES:

- When favorites are saved in the Web Client, they are saved as URLs instead of as document shortcuts, which allows you to save any page in the Web Client as a favorite, and not just documents. For example, if you have access to the Audit Manager, you can save it as a favorite for quick access to the page. However, if the name of your Axiom virtual directory changes (which should be a rare occurrence), the web favorite no longer opens the URL.
- If a web favorite points to a document, and that document is later moved or renamed, the favoritel continues to open that document, but the favorite name is not updated.
- If you organize web favorites into a folder using the Desktop Client, the folder is not displayed in the Web Client—instead, the flattened list of favorites is displayed.

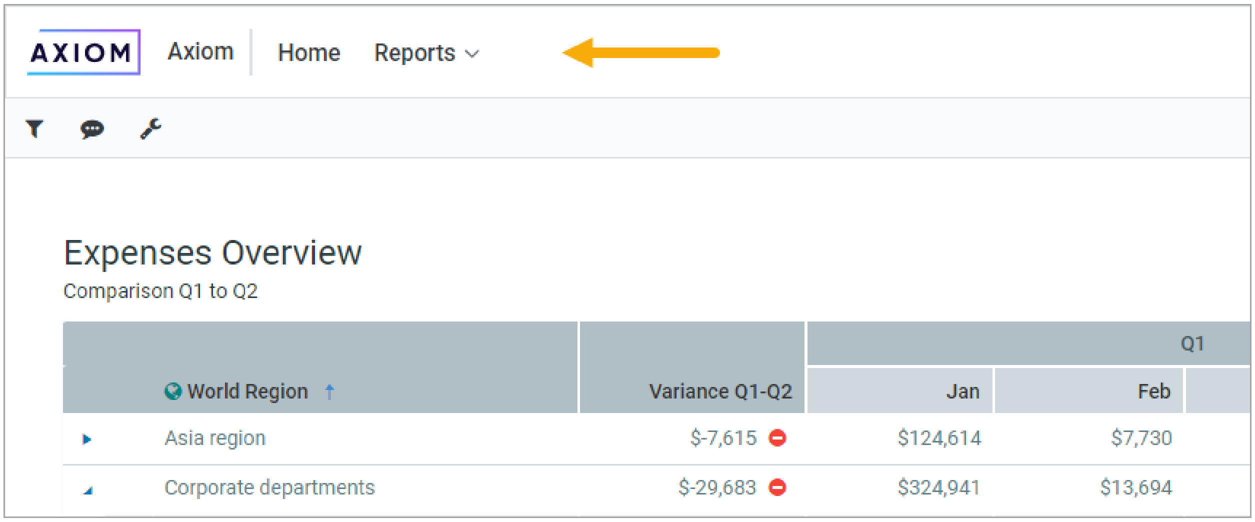
▶ Deleting favorites

To delete a favorite, hover your cursor over the favorite name (in either the Bookmarks panel or your home page), and then click the delete icon 🗑. The favorite is deleted in the Web Client and in the Desktop Client.

If the document or page for an existing favorite is deleted, the favorite is not automatically deleted. If you try to use the favorite, you are informed that the document or page cannot be found. In this case, you must manually delete the favorite.

Navigation menu

Using the Navigation menu across the top of the Web Client, you can navigate to various files and locations.



Example custom Navigation menu

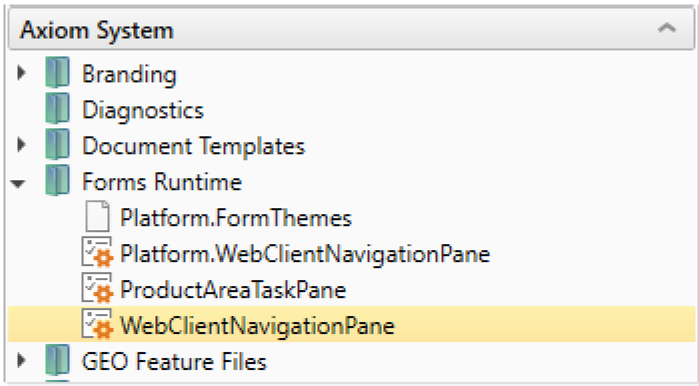
The Navigation menu is context-sensitive and Axiom updates it dynamically to show the available navigation links for the currently active area of the Web Client. The following menus are available:

Area	Description
Custom	Axiom provides a set of standard navigation links by default for custom systems when you are in the Web Client. The standard navigation links can be customized, so each client's system may look different. Only administrators can customize navigation links using the Desktop Client.
Product-Specific	Systems with installed products have product-specific navigation links. When you select a product name from the Area menu in the Navigation bar., the product-specific links are displayed in the Navigation menu. For more information, see the product-specific documentation.
Common Product Areas	Certain common product areas are available in all systems and have a standard set of links in the Navigation menu. These common areas include: • **Intelligence Center**: Currently, this area does not have any navigation links, but a menu may be added in a future release. • **System Administration**: The system administration links are displayed when you are in the System Administration area and provide access to features such as the Table Manager, Audit Manager, and Security Manager.

Additionally, when you open a report or other browser-based document, that document may be associated with a set of document-specific navigation links. These links are added to the Navigation menu while you are in that document.

▶ Restoring the Navigation menu to use the system default

For custom systems, the contents of the Navigation menu are controlled by the `WebClientNavigationPane.axl` file, which is located in the following folder: `\Axiom\Axiom System\Forms Runtime`. This is a custom task pane file that is rendered in the Navigation menu of the Web Client.



Because the contents of the Navigation menu are customizable, Axiom does not automatically overwrite this file when updates are made. Instead, the most current version of the file is placed in this folder as `Platform.WebClientNavigationPane.axl`. In new systems, both files are the same, but in existing systems only, `Platform.WebClientNavigationPane.axl` has the latest updates.

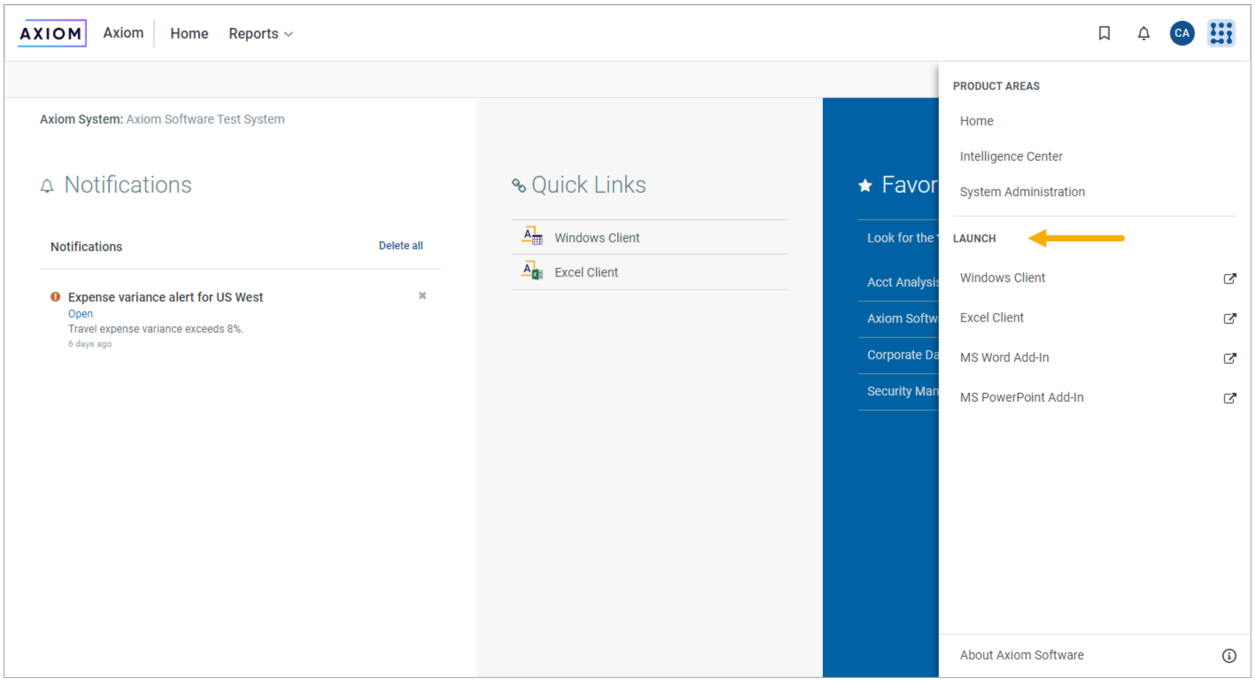
At any time, you can restore the system default Navigation menu as follows:

1. Delete `WebClientNavigationPane.axl`.
2. Copy `Platform.WebClientNavigationPane.axl`.
3. Rename the copy to `WebClientNavigationPane.axl`.

Your copy of the Navigation menu is the same as the current system-provided version. You can make customizations to this file as needed or use the system default.

Launching Axiom applications

You can launch various Axiom applications from the Area menu in the Web Client, including the Axiom Excel Client and Axiom Windows Client.



Area menu with Launch section to launch various applications

The Launch section of the menu serves the following purposes:

- You can install the Axiom Desktop Client from this menu as needed. After installing the Desktop Client (Windows Client or Excel Client), you can continue to launch the client from this location or use other options to launch the client (such as a shortcut on your desktop).
- You can install and launch Axiom add-ins (for example, add-ins for Microsoft Office applications).
- If your system uses SAML or OpenID authentication, this menu is the only way to launch installed applications. When using SAML and OpenID authentication, you must be authenticated using the Web Client before you can launch a desktop application.

NOTE: The specific clients and add-ins listed on the Quick Launch menu depend on your specific security permissions (as defined on the **Permissions** tab of security). If you do not have permission to a specific client or add-in, that item is not displayed on the Quick Launch menu. If you do not have security permissions to any of the applications on the Quick Launch menu, the icon and the menu are not present in the navigation bar.

Launching the Axiom Desktop Client

Using the Area menu, you can launch the Axiom Desktop Client. Click one of the following items in the menu:

Item	Description
Windows Client	Launches the Axiom Windows Client on your desktop. You must have the **Windows Client Access** security permission to see this icon and launch the client. If you do not have this permission, the Windows Client icon is hidden.
Excel Client	Launches the Axiom Excel Client on your desktop. Requires Microsoft Excel. You must have the **Excel Client Access** security permission to see this icon and launch the client. If you do not have this permission, the Excel Client icon is hidden.

If the client is not already installed on the current workstation, clicking the icon initiates the install and then launches the client. If the client is already installed, clicking the link launches the client. Your browser must support ClickOnce to install and launch the client.

The appropriate client to use depends on your organization's preferences and on your user role. Your organization will provide instructions as to which client you should use and grant access to the clients as needed.

For more information on installing the Windows Client and Excel Client, including prerequisites and configuration details, see the Installation Guide (on-premise systems) or the Axiom Cloud Technical Guide (Axiom Cloud systems). You can download and install some software prerequisites from the Web Client. You can also access the prerequisites download page from the Axiom About box.

NOTE: The default home page also contains links to launch the Windows Client or the Excel Client.

Launching add-ins

Using the Area menu, you can launch Axiom add-ins. Click one of the following items in the menu:

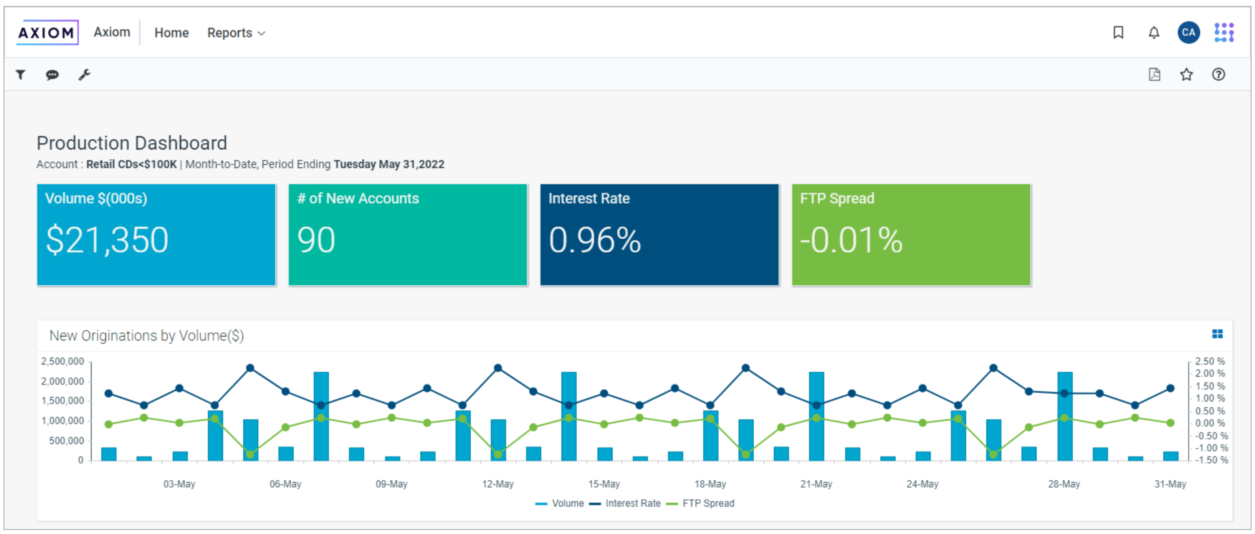
Item	Description
MS Word Add-In	Launches the Axiom Add-In for Microsoft Word. You must have the **Word Add-In Access** security permission to see this icon and launch the add-in. If you do not have this permission, the icon is hidden.
MS PowerPoint Add-In	Launches the Axiom Add-In for Microsoft PowerPoint. You must have the **PowerPoint Add-In Access** security permission to see this icon and launch the add-in. If you do not have this permission, the icon is hidden.

The Word and PowerPoint Add-ins are optional applications to support document integration between Axiom and Word or PowerPoint.

3

Using Axiom forms in the Web Client

Axiom spreadsheet files, such as plan files and reports, can be web-enabled so that you can access them in the Axiom Web Client. These web-enabled Axiom files are known as *Axiom forms*. Using Axiom forms, you can view reporting data and make planning inputs using an HTML5 web page instead of a spreadsheet.



The contents of the form and what you can do with it is entirely up to the form designer. You can use forms for many different purposes—from basic reports and input forms to complex dashboards and plans with rich interactivity. Ideally, the form should include embedded instructions so that the purpose of the form is clear. If you have questions about a form, contact the designated contact person for the form (if provided) or contact your system administrator.

In the Web Client, you can open Axiom forms in the following ways:

- Using predefined hyperlinks in your home page (and in subsequent forms that you may open)
- Using the Plan File Directory page (plan files only)
- Using the Web Client Navigation menu
- Using the Intelligence Center, to view all reports (including forms) that are available to you

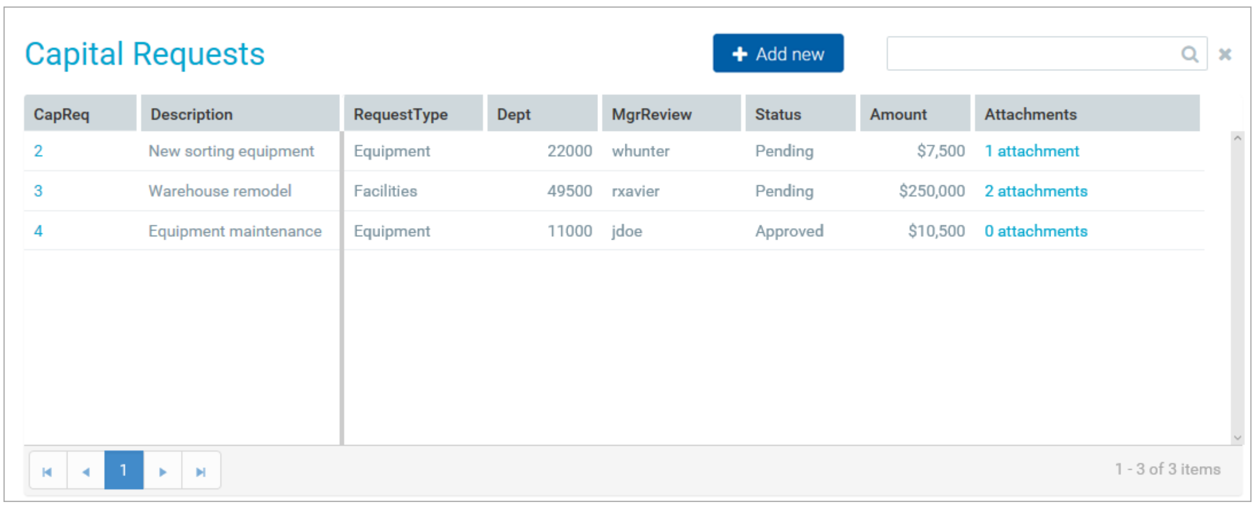
NOTE: Axiom forms are designed in the Axiom Desktop Client (Excel Client or Windows Client). The Web Client only supports viewing and interacting with existing forms; new forms cannot be designed in the Web Client environment. For more information on designing forms, see the *Axiom Forms and Dashboards Guide*.

Opening plan files using the Plan File Directory

Using the Plan File Directory page, you can review the list of plan files that you have permission to access in a file group, and open those plan files.

If your system uses the directory page, your home page or another similar landing page contains links to the appropriate directory. There is no built-in method to navigate to the directory; you must be provided with a link.

The directory shows the full list of plan files in the file group that you have security permission to access, as well as various columns with information about the plan file. The columns are defined at the file group level and cannot be changed in the Web Client.

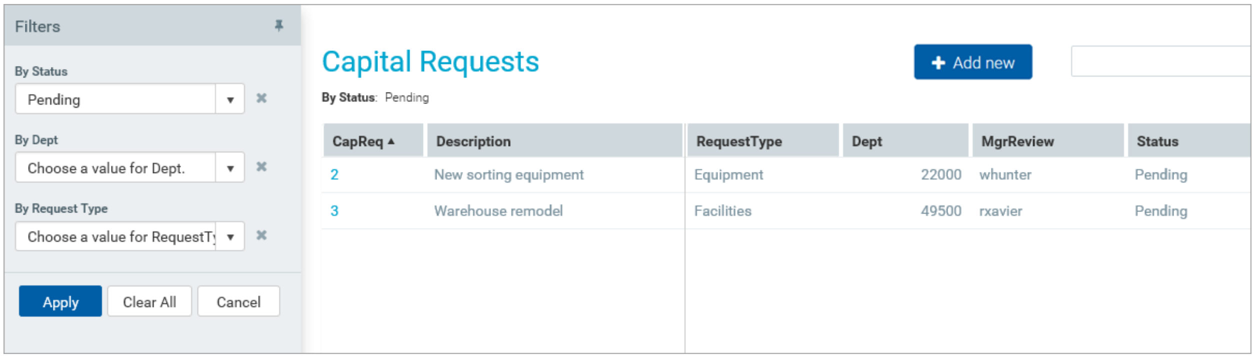


Example Plan File Directory

Searching and filtering the directory

To find specific plan files, use the search box at the top of the page. You can also sort any column by clicking the column header.

If the Plan File Directory page has been set up with refresh variables, you can use these variables to filter the directory. Click the **Filter** icon in the toolbar to open the **Filters** panel and select values for the variables. When you click **Apply**, your selections are used to filter the report.



Example filters for the directory

For example, imagine that the file group is for capital requests, and the Filters panel contains a refresh variable to select a request type. If you select **type 1** and click **Apply**, the directory is filtered to show only plan files that are classified as type 1. The current filter is shown at the top of the page, underneath the header.

The ability to filter the directory and the specific filters available are determined at the file group level. If the Filter icon is not present, no refresh variables have been defined for the file group.

Opening a plan file

To open a plan file, click any column value that is displayed in blue hyperlink text. The column that contains the hyperlinks is configurable. In the previous example screenshot, the values in the CapReq column are hyperlinks that open the corresponding plan file.

Viewing and managing attachments

If plan file attachments are enabled for the file group, you can view and manage attachments using the **Attachments** column. This column displays the current number of attachments for each plan file. You can click the link to open the **File Attachments** dialog, where you can upload, view, edit, and delete attachments for the plan file, depending on your level of permission to the plan file. The dialog provides similar functionality to the File Attachments panel for plan files.

The Attachments column is optional and is present only if the directory has been configured to show it.

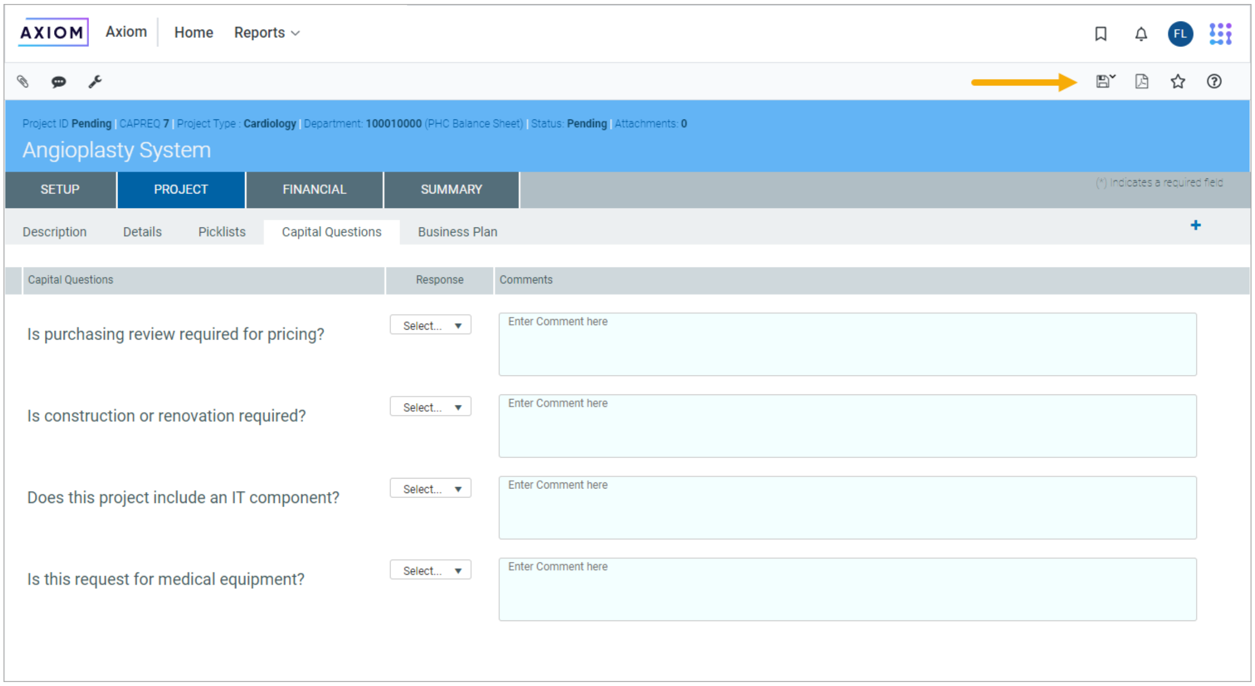
Creating a new plan file

If the current file group is an on-demand file group, you can create a new plan file by clicking the plus icon at the top of the page. This plus icon is displayed along with customizable text. In the previous example, the custom text is **Create new request**.

This feature is available only if the file group has a designated form to create new plan files (an **Add File Form**). Clicking the plus icon opens that form to create a new plan file.

Saving data from an Axiom form

Axiom forms can be designed to save data to the database from the form. By default, if a form is configured to save data, a save icon is displayed in the right side of the Task bar.



Example form with save icon in Task bar

If the save icon is active, you can click it to save data. After the save is complete, you may see a confirmation message, or that message may be disabled in the current form.

The icon may be inactive if any of the following are true:

- No data saves are currently enabled in the form. In some cases, data saves may be configured so that they are dynamically enabled or disabled depending on selections you make in the form. If a data save becomes enabled later in the session, the save icon becomes active.
- You do not have security permission to save data from the form. Contact your system administrator for assistance if you believe you should be able to save data from the form.
- The form uses save locking, and you do not currently have the save lock. When save locking is used, only one user at a time can "reserve" the ability to save data from the form.

You might be able to save data from the form even if the save icon is not present in the task bar. Older forms and forms with special requirements may use a button or a similar component within the form to save data. Usually this component is labeled "Save" and can be located anywhere in the form.

Reserving the ability to save data from an Axiom form (save locking)

By default, Axiom forms allow concurrent access. Multiple users can access the form at the same time and save data from the form.

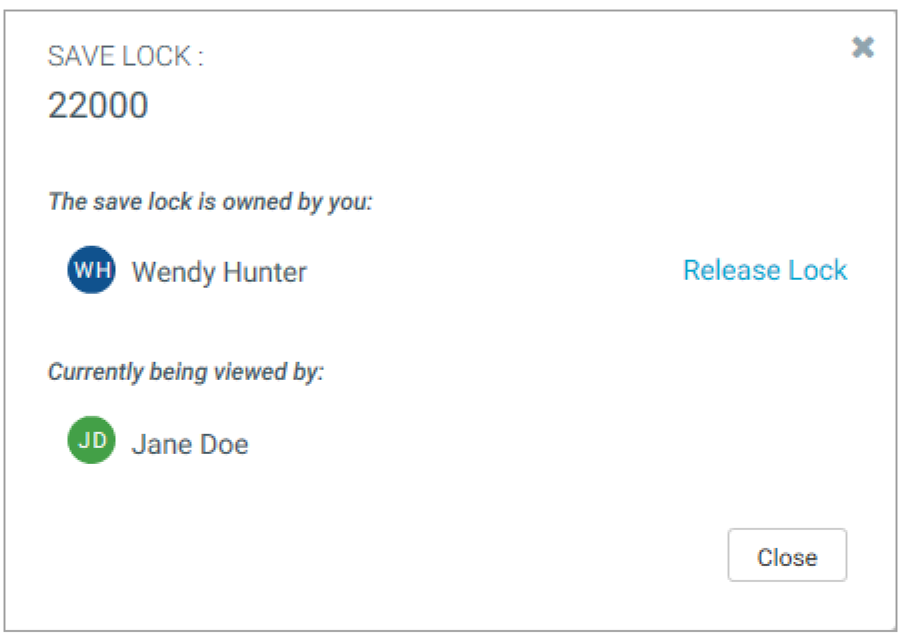
However, some Axiom forms may be configured so that only one user at a time can "reserve" the ability to save data from the form for a particular data context. This feature is known as "save locking." If a form uses save locking, you must own the save lock to save data using the form. If you do not own the save lock, you cannot save data.

If an Axiom form uses save locking, the save lock status is displayed by default in the Task bar along with the save icon:

	You own the save lock and can save data. Click the save icon to save data, or click the down arrow to open the Save Lock dialog.
	You do not own the save lock and cannot save data. Click the save icon to open the Save Lock dialog.

The Save Lock dialog displays the following information:

- The description of the current data context (shown at the top of the dialog)
- The name of the user who currently owns the save lock
- The name of any other users who are currently viewing the form and who could potentially acquire the save lock if it becomes available



Example Save Lock dialog

Older forms and forms with special requirements might not be able not use the save icon in the task bar, but the form may still allow saving data using a button or some other component within the form. If the form does not use the save icon, but does use save locking, the save lock status is displayeds in the task bar using the following informational icons.

 You own the save lock and can save data.

 You do not own the save lock and cannot save data.

In both cases, clicking the status icon opens the Save Lock dialog.

Acquiring the save lock

If a form uses save locking, you must own the lock to save data. In most cases, you do not need to do anything to acquire the save lock. Axiom automatically attempts to acquire the save lock for you in the following cases:

- When you open the file (if save-to-database is enabled).
- When save-to-database becomes initially enabled (if it is not enabled on open).
- When the data context for the form changes (the first time a particular data context becomes active). This condition may apply in cases where the form is configured to dynamically change the type of data being saved. For example, a form may be configured to save data to a specific department based on the department selection in the Filters panel. The form can be configured so that each department is a unique data context and the save locking feature applies individually to each department.

If you do not own the save lock and you want to acquire it, click the gray save icon to open the Save Lock dialog, and then click **Acquire Lock**. The lock can be acquired as follows:

- If no other user currently has the lock, you can acquire it.
- If you are an administrator, you can acquire the lock from another user, but only do this when absolutely necessary. The original user cannoto save data if you acquire the lock.
- If you have the lock in a different browser session, you can acquire it from yourself. You can no longer save data from the other session if you acquire the lock.

Releasing the save lock

If you own the save lock, you can release it so that some other user can save data from the form. You might do this if you are reviewing the form and do not intend to make any data changes. Click the down arrow next to the save icon to open the Save Lock dialog, and then click **Release Lock**. Aftere you release the lock, you cannot save data from the form unless you reacquire the lock.

If you do not explicitly release the save lock, it remains locked to you as long as you have the form open, unless an administrator breaks the lock or your session times out. You can also release the save lock automatically if you:

- Log out of the Web Client.
- Complete the currently active process task using a button in the form. If you still have security permission to save data after completing the task, you must manually reacquire the save lock.
- Navigate to a different form or page (within the same browser tab). You may experience a brief delay of 20 seconds before the lock is released.
- Close the browser tab. For most browsers, you may experience a brief delay of 10 seconds before the lock is released. However, if you use Microsoft Internet Explorer, you may experience a delay of up to 5 minutes before the lock is released.

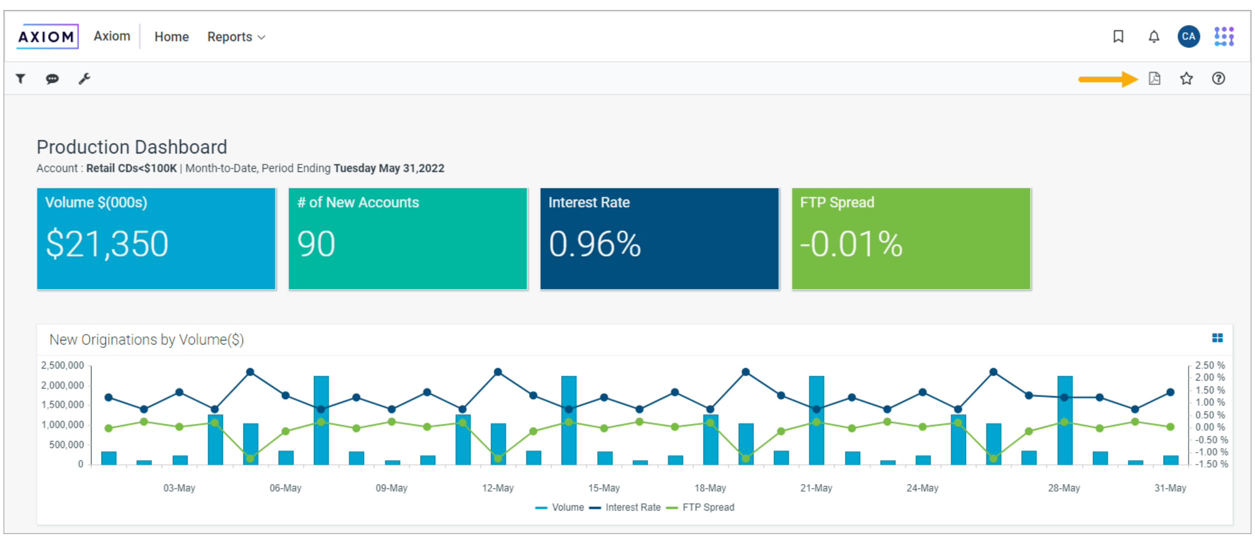
Printing an Axiom form

You can print an Axiom form using either of these methods:

- Use the native print functionality of your browser.
- Generate a PDF copy of the form and then print the PDF.

▶ Generating a PDF for printing

If an Axiom form is configured to support generating a PDF, Axiom displays a PDF icon in the right side of the Task bar. You can click this icon to generate a PDF of the form.



Example Axiom form with PDF icon

After the PDF is generated for the form, it opens in your browser. The specific printing procedures and features depend on your browser and your PDF reader.

When using the PDF option, you can configure the form for printing. For example, you can show or hide certain components in the print copy and automatically extend formatted grids to show all rows.

Some forms are designed to generate a PDF directly from within the form. You might see a button labeled "Create PDF" or it may use the same or similar PDF icon.

If the task bar icon is not available and the form does not contain a PDF button, use the Tools menu to generate a PDF of the form. The absence other PDF options might indicate that the form has not been optimized for PDF generation.

Using browser print functionality

If you print from the browser, the specific printing procedure and features depend on the browser you use. Note the following tips:

- Use your browser's Print Preview functionality first to preview what the printout will look like, and then make adjustments.
- Many Axiom form designs are better suited for printing in landscape orientation than portrait.
- If the form does not fit properly within the page, try enabling or disabling **Fit content to window**, and then try **Print Preview** again.

  From the Tools menu, click **Options > Fit content to window** to select or clear the check box. This option affects forms differently depending on the form configuration. It is not useful for all forms.

If the Axiom form is opened as a web tab in the Excel Client or the Windows Client, you must open it within a browser to gain access to the browser print functionality. You can right-click the file tab, and then click **Open in browser**.

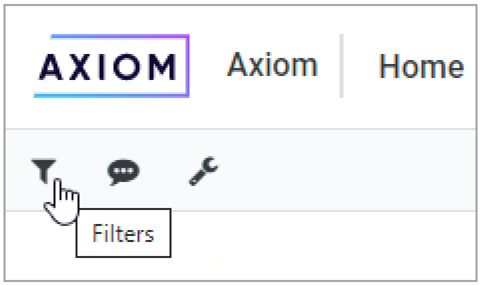
Filtering data in Axiom forms

Axiom forms can be designed to show different data depending on choices you make in the form:

- The form can contain interactive components such as combo boxes, check boxes, text boxes, and radio buttons. The form designer can design the form so that the data changes are based on the selections you make with these components. In this case, how the interactivity is presented and how it works is defined by the form designer.
- The form can be set up to use refresh variables. In this case, you can use the standard Filters panel to enter values for those variables, and then apply the values to refresh the data in the form.

Using the Filters panel to filter data

To open the Filters panel, click the **Filters** icon in the gray task bar across the top of the form.



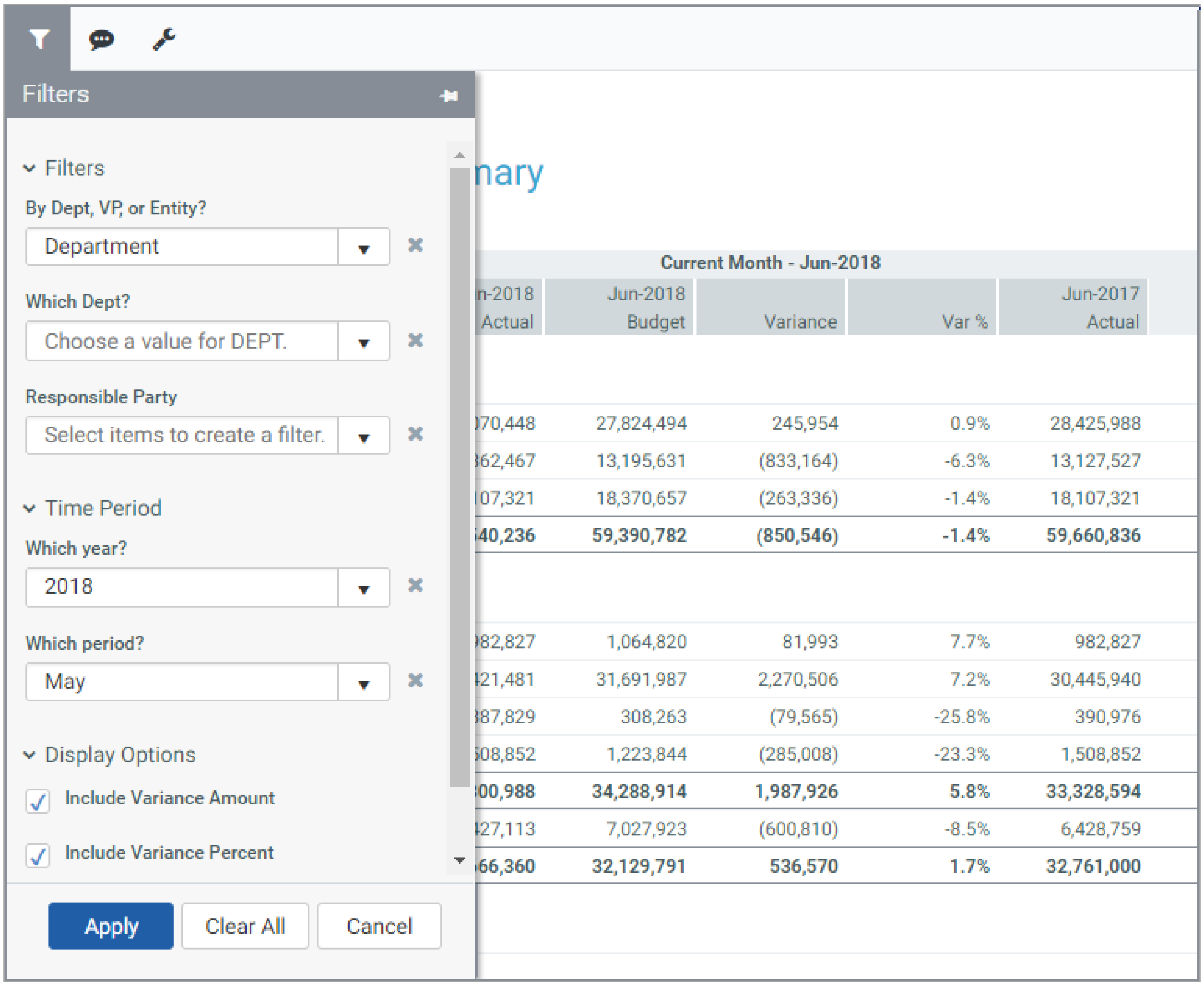
This panel displays the refresh variables for the form:

- To update the data in the form, make selections for each refresh variable, and then click **Apply**. The form is updated to show the latest data based on your selections.

  Variables can be required or optional. If the Apply button is inactive, a selection has not yet been made for a required variable. If a variable is optional, you can leave it unselected.

- If the variables have selected values, you can clear existing values by clicking **Clear All**. You can start over and select new values for each variable. You can also clear any individual variable by clicking the **X** button to the right of the variable.

- To close the Filters panel without changing the current report parameters, click **Cancel**. The form is not updated.



Example Filters panel

By default, the Filters panel overlays the form. When you click **Apply** or **Cancel**, the panel closes so that you can view all of the form. You can also click the pin icon in the top right-hand corner of the panel to keep the panel open. In this case, the form is pushed to the side so that you can view the refresh variables and the entire form at the same time. When pinned, the panel remains open until you click the pin or the filter icon again.

The type and content of the refresh variables are defined by the form designer. Ideally, the form designer should name each variable so that its meaning is obvious. Note the following:

- Some variables take "free-inputs" that allow users to type any value into the field. The only restriction is the data type of the value. Some variables can only accept numeric inputs (with or without a decimal), while others accept text, numbers, or both.
- Other variables are restricted to a defined set of valid values. In most cases, these variables are presented as a searchable drop-down list.

NOTE: The Filters icon is displayed only if the form has defined refresh variables (which is determined by the form designer).

Using the Filter Wizard in Axiom forms

Some Axiom forms are set up so that you can launch the Filter Wizard using a button in the form. Using the Filter Wizard, you can create a filter criteria statement that affects the form in some way, such as to filter the data shown in the form. How the filter is used is defined by the form designer.

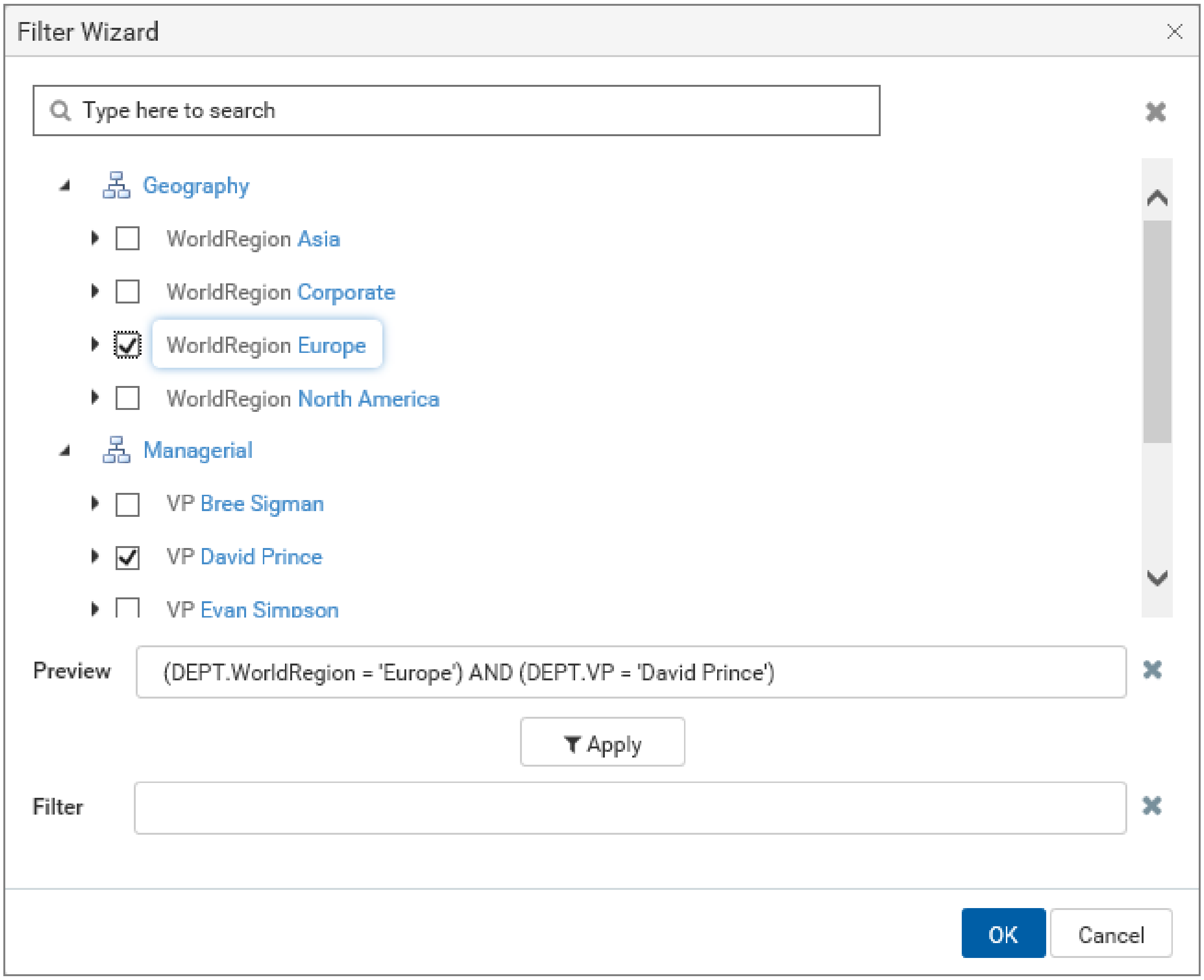
The Filter Wizard offers two approaches for building filters. When you use the button to open the Filter Wizard, the wizard is automatically set to one of these options, as configured by the form designer:

- **Data Hierarchies**: Build a filter using hierarchies in your system. You select the items that you want to include and the Filter Wizard builds the filter criteria statement for you.
- **Advanced Filter**: Build a filter based on a specific table and column. This approach allows for more operators, including greater than, less than, and not equal to.

Data hierarchies

To create a filter using data hierarchies, select the check box for each item that you want to include in the filter. You can expand each hierarchy to view the listed items. You can also type a value into the filter box above the hierarchies to filter the list.

For example, you may have a hierarchy for Geography that starts at the WorldRegion level and goes to the Country level, and then goes to the LocalRegion level. To filter by a specific country in the Asia WorldRegion, you can expand the Geography hierarchy, expand the Asia WorldRegion, and then select the applicable country.



Example Filter Wizard using hierarchies

As you select items, the filter criteria statement is created in the **Preview** box at the bottom of the dialog. When the filter is as you want it, click **Apply** to move the filter down to the **Filter** box, which replaces any current filter, and then click **OK** to submit the filter to the form.

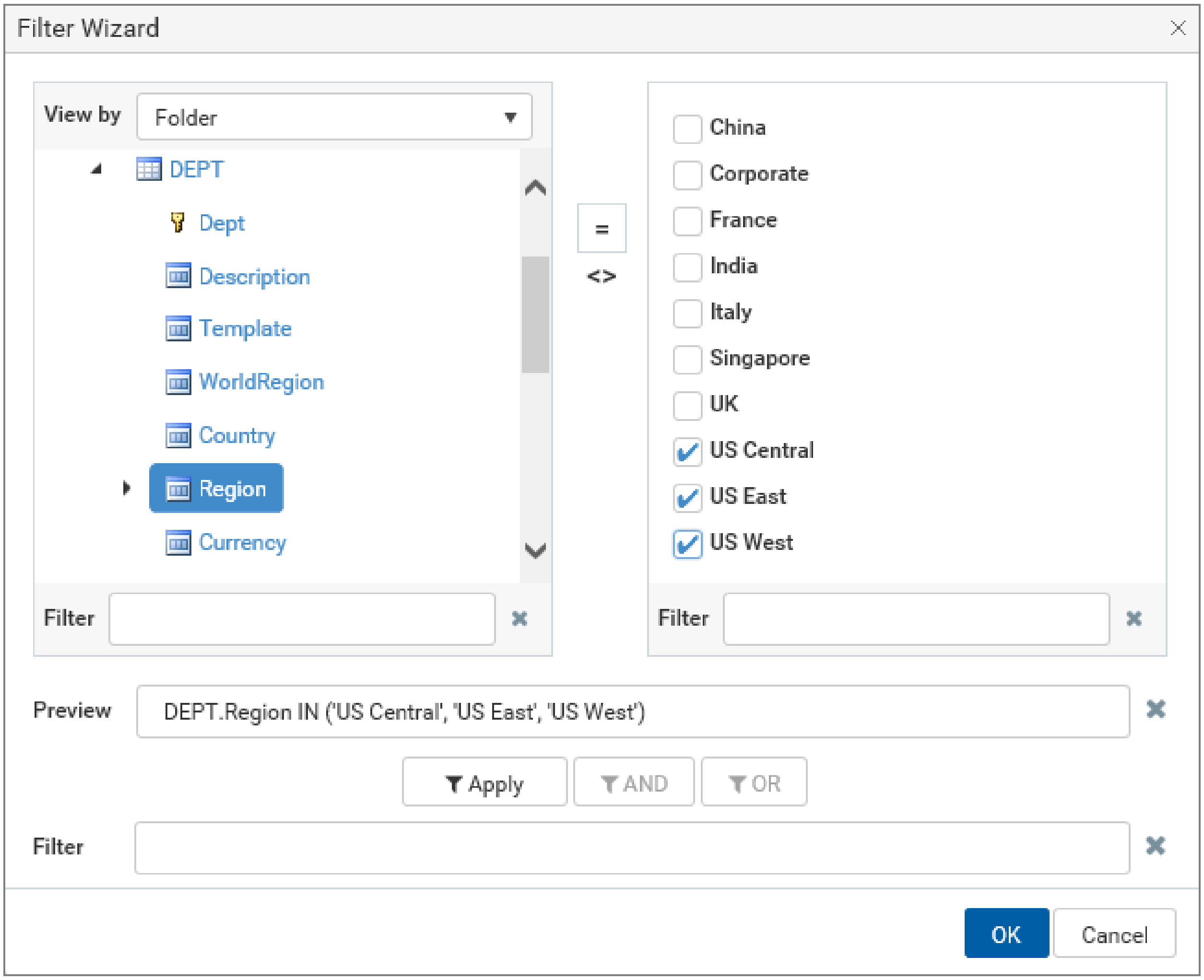
The available hierarchies in the dialog are determined by the form designer and by your table permissions. The form designer may show certain hierarchies that are relevant to the current form.

Note the following about filters that are created using data hierarchies:

- Only "include" filter criteria statements can be created using data hierarchy selections. As you select items, those items are included by using an equals (=) operator or an IN statement (for including multiple items at the same level).
- Certain assumptions are made regarding the use of AND and OR when multiple items are selected from different hierarchy levels or different hierarchies. To change the way each statement is joined, you can manually edit the filter.

Advanced filter

Using the Advanced Filter option, you can create a filter based on specific tables and columns and using any supported operator.



Example Filter Wizard using advanced view

The tables available in the dialog are determined by the form designer and by your table permissions. The form designer may only choose to only show certain tables that are relevant to the current form.

To create a filter using Advanced Filter:

1. In the left-hand side of the dialog, select the table column on which you want to base the filter.

   For example, if you want to create a filter such as `DEPT.DEPT>=5000`, then you must select the DEPT column from the DEPT table.

   To find the desired table and column, you can filter the list by typing into the Search box. The filter matches based on table and column names.

Once you select a table column, the values in that column display in the right-hand side of the dialog.

> **TIP:** Alternatively, you can use the folder icon to the right of the **Preview** box to load a previously saved filter from the Filters Library. If you do this, your selected filter is placed in the Preview box, overwriting any current content in the preview. Skip to step 4.

2. In the right-hand side of the dialog, select the value(s) on which you want to base the filter. You can type into the filter box above the list of values to filter the list.

3. In the space between the two selection boxes, select the operator to use for the filter criteria statement, such as equals, not equals, greater than, or less than. By default, the filter statement uses equals (=).

   Note the following about filter operators:

   - Greater than / less than options are only available if the column data type holds numbers or dates.
   - If multiple items are selected, then IN and NOT IN syntax is automatically used for equals and not equals respectively.
   - If the column is a string column and the value contains an apostrophe (such as O'Connor), the wizard automatically converts this value to double apostrophes so that it is valid for use in the filter (O''Connor). Apostrophes in string values must be escaped this way so that they are not interpreted as the closing apostrophe for the filter criteria statement.
   - The LIKE operator is supported, but is not available for selection in the Filter Wizard. You must manually edit the filter criteria statement if you want to use it. Only advanced users with knowledge of valid SQL LIKE syntax should do this.

4. Review the filter criteria statement in the **Preview** box to ensure that it is as intended. If you need to make changes, you can manually edit the statement, or you can start again with a new statement. If you want to clear the statement, click the **X** icon to the right of the Preview box.

   For more information on valid syntax, see Filter criteria syntax.

5. If no filter is currently present in the **Filter** box, click **Apply** to move the filter down to the Filter box. If a filter is currently present in the Filter box, you can do one of the following:

   - Click **Replace** to overwrite the current filter with the preview filter.
   - Click **AND** or **OR** to add the preview filter to the current filter. This creates a compound criteria statement.

   You can repeat the filter creation process as many times as necessary to create the desired statement. You can also manually modify the filter in the Filter box as needed, such as to add parentheses to group statements.

6. When the filter in the Filter box is complete, click **OK**.

> **TIP:** If you want to save the filter you have created for future use, click the save icon to the right of the Filter box. You can select a folder location in the Filters Library (or My Documents if applicable), and specify a name for the filter. This option is only available if you have read/write access to at least one location where filters can be stored.

Your filter is submitted back to the form.

Filter criteria syntax

Several areas of Axiom use criteria statements to define a set of data. The syntax for these criteria statement is as follows:

```
Table.Column='Value'
```

- *Table* is the name of the database table.
- *Column* is the name of the column in the database table.
- *Value* is the value in the column.

If the column is String, Date, or DateTime, the value must be placed in single quotation marks as shown above. If the column is Numeric, Integer (all types), Identity, or Boolean, then the quotation marks are omitted.

For example:

- To filter data by regions, the filter criteria statement might be: `DEPT.Region='North'`. This would limit data to only those departments that are assigned to region North in the Region column.
- To filter data by a single department, the filter criteria statement might be: `DEPT.Dept=100`. This would limit data to only department 100.

If the table portion of the syntax is omitted, then the table is assumed based on the current context. For example, if the filter is used in an Axiom query, then the primary table for the Axiom query is assumed. If the current context supports *column-only syntax*, and the specified column is a validated key column, then the lookup table is assumed.

▶ Operators

The criteria statement operator can be one of the following: =, >,<,<>,<=,>=. For example:

```
ACCT.Acct>1000
```

SQL IN, LIKE, and BETWEEN syntax can also be used. For example:

```
DEPT.Region IN ('North','South')
```

Compound criteria statements

You can use `AND` and `OR` to combine multiple criteria statements. If you are creating long compound criteria statements with multiple ANDs or ORs, you can use parentheses to group statements and eliminate ambiguity. For example:

```
(DEPT.Region='North' OR DEPT.Region='South') AND (ACCT.Acct=100 OR
ACCT.Acct=200)
```

NOTES:

- When filtering on multiple values in the same column, you must use OR to join the statements, not AND. In the example above, if the statement was instead `DEPT.Region='North' AND DEPT.Region='South'`, that statement would return no data because no single department belongs to both the North and South regions. When you use OR, the statement will return departments that belong to either the North or the South regions.
- Alternatively, you can use the SQL IN syntax to create a compound statement for values in the same column. For example, the statement `DEPT.Region='North' OR DEPT.Region='South'` can also be written as `DEPT.Region IN ('North','South')`. The Filter Wizard uses IN syntax by default.

Using criteria statements in functions

If you are using a criteria statement in a function, such as GetData, you must place the entire criteria statement in double quotation marks. For example:

```
=GetData("Bud1","DEPT.Region='North'","GL1")
```

You can also place the criteria statement in a cell and then use a cell reference in the function. In this case, you do not need to use double quotation marks in the function, unless you are concatenating text and cell reference contents within the function.

Referencing blank values in filters

If a string column contains a blank value (an empty string), you may want to create a filter that includes or excludes records with these blank values. This empty string is indicated with empty quotation marks in the filter. For example: `ACCT.CMAssign=''` or `ACCT.CMAssign<>''`

If you use the Filter Wizard to construct the filter, it will automatically use the appropriate syntax.

If the blank value is actually a null instead of an empty string, the filter should use the syntax IS NULL or IS NOT NULL. String columns should not allow null values, but Date and DateTime columns often allow null values. For example: `Project.StartDate IS NULL` or `Project.StartDate IS NOT NULL`

Referencing values with apostrophes in filters

If a string column contains a value with an apostrophe (such as O'Connor), then that apostrophe must be escaped with another apostrophe so that it is not read as the closing apostrophe for the filter criteria statement. For example:

```
Dept.VP='O'Connor'
```

Invalid. This construction does not work because Axiom reads it as Dept.VP='O' and then does not know what to do with the rest of the text.

```
Dept.VP='O''Connor'
```

Valid. The extra apostrophe tells Axiom that the apostrophe is part of the string value and is not the closing apostrophe.

> **NOTE:** This syntax must use two apostrophe characters in sequence and *not* a double quotation mark. If you create the filter using the Filter Wizard, Axiom will construct the appropriate syntax for you.

Referencing Date or DateTime values in filters

If your locale uses a date format where the first value is the day, filters using that date or date-time value will not process correctly. Instead, the date or date-time value must be in standard format. Standard format is `YYYY-MM-DDTHH:MM:SS` for DateTime and `YYYY-MM-DD` for Date.

If you use the Filter Wizard to construct the filter, it will automatically convert the date or date-time value to the appropriate syntax.

Validating filters

When you are entering a filter criteria statement into an Axiom dialog, you can validate the filter to ensure that it uses correct syntax.

Filter validation is available in the various dialogs throughout the system, such as:

- Security Management
- Open Table in Spreadsheet
- GetData Function Wizard
- Copy Table Data

The validation feature only validates the filter syntax; it does not validate the logic of the filter or ensure that it will return the desired data. For example, it would detect if you misspelled a column name and allow you to correct it.

If the syntax is correct, the message "Filter is valid" appears in the dialog.

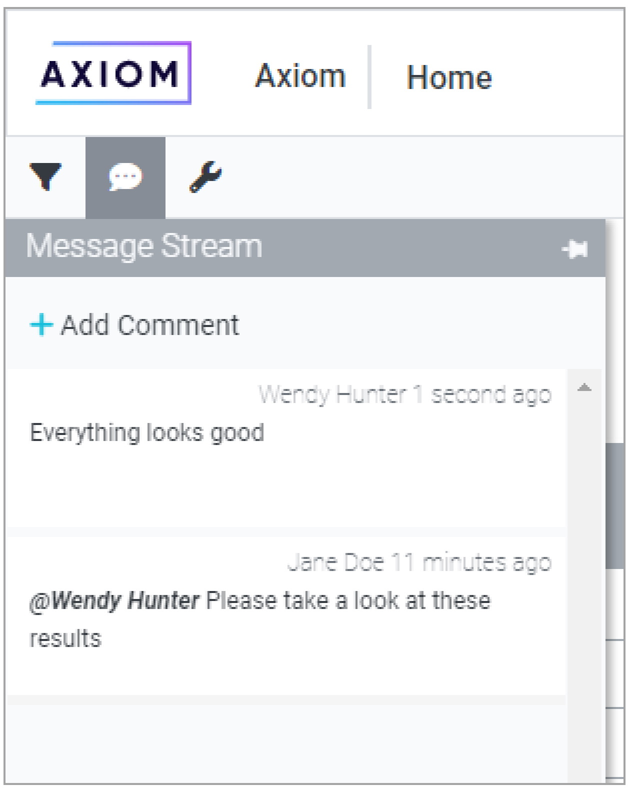
If the syntax has errors, the message "Filter is invalid" appears in the dialog. You can click this link to bring up a **Filter Error** message box that contains more information about the error. In the **Filter Error** message box, click **Show Details** to see the specific error message.

Commenting on form documents

When viewing an Axiom form, you can view comments that other users made about the document and also make comments about the document. New comments are stored in the message stream for that document so all other users who access the document can see the comments. Additionally, you can tag other users in the comment, so that the tagged users are notified about the comment.

▶ Viewing comments

To view the message stream for the current document, click the **Messages** icon (the speech bubble) in the gray task bar across the top of the form. The **Message Stream** panel displaysg all comments that were made about the document.



Example message stream

Comments are displayed in the order they were made, with the most recent comment shown at the top of the panel. Each comment shows when the comment was made and the user who made it.

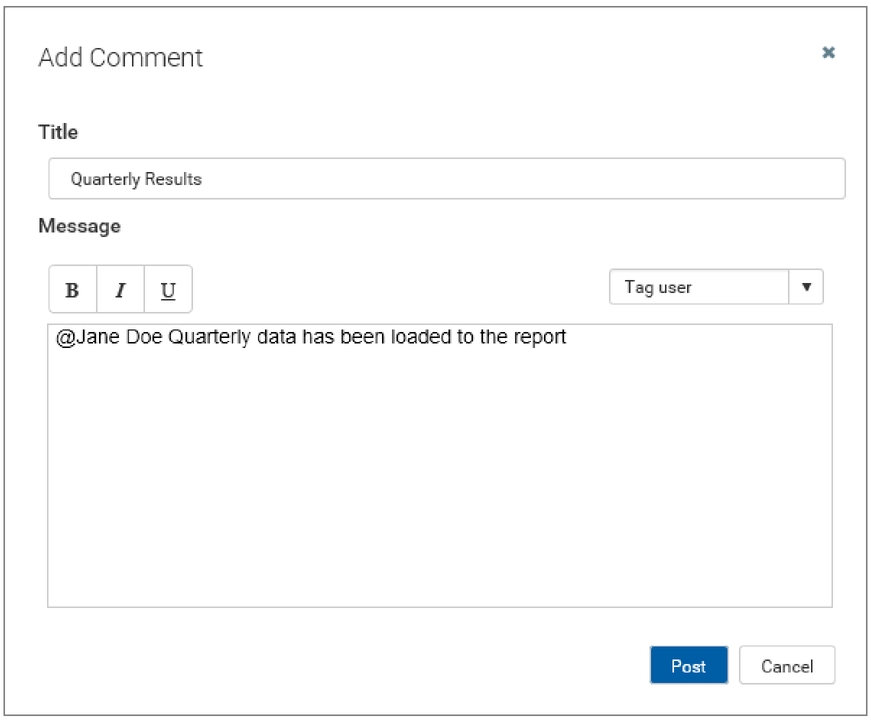
If the comment contains more content than can be displayed within the panel view, you can click the > symbol to open a dialog with the full comment text.

Comments are stored for the life of the document and cannot be deleted.

> **NOTE:** Axiom only displays the Messages icon if the form is enabled for the message stream (which is determined by the form designer).

Adding a comment

To add a comment, click **Add Comment** at the top of the Message Stream panel. In the **Add Comment** dialog, you can define an optional title for the comment, and then enter the comment text. Basic text formatting of bold, italic, and underline is available.



If desired, you can "tag" one or more users in the comment, so that those users are notified about the comment. Any user tagged in the comment will receive an email that contains the content of the comment and a link to the document. To tag a user, use the **Tag user** box to find a user and insert the tag. You can type into the box to find a specific user, or select a user from the drop-down list. When you click on a user name in the list, a tag will be inserted at the current cursor point in the comment text. The tag displays as `@FirstName LastName`.

When you click **Post**, the comment is saved to the message stream, and any tagged users will be notified.

NOTES:

- All users with access to the document can see comments posted to the message stream. Any comments made should be appropriate for the entire document audience. Do not post any sensitive information to the message stream.
- Adding a comment automatically subscribes you to the document's message stream, and tagging a user automatically subscribes that user to the document's message stream.

▶ Ongoing notifications (subscriptions)

If you have made a comment in a document's message stream, or if you have been tagged in a comment, you are now subscribed to that document's message stream. Whenever a new comment is made to that document's message stream, you will receive a notification in the Notifications panel.

The notification details the user who made the comment and when it was made, the text of the comment, and a link to open the file.

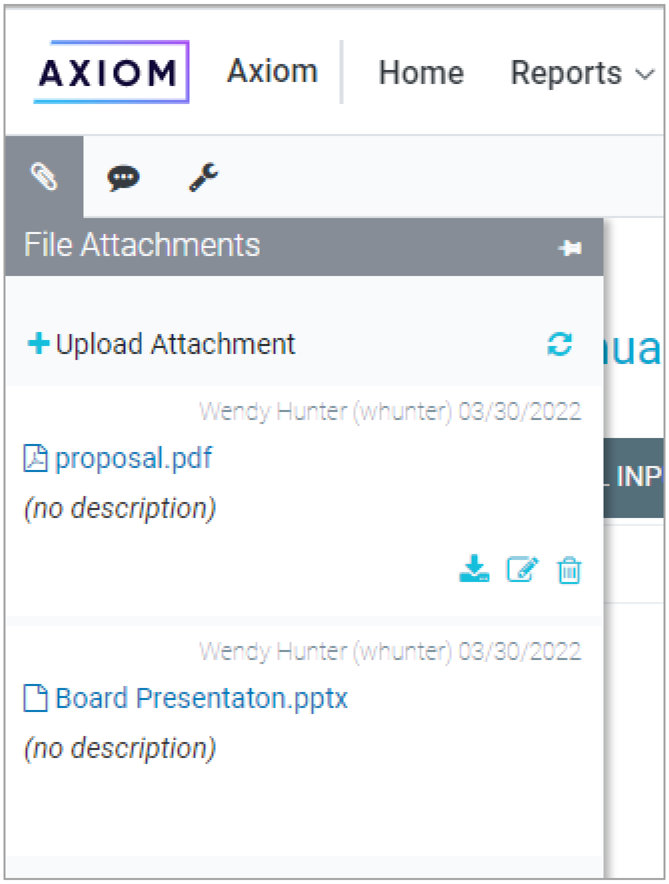
Currently it is not possible to unsubscribe from a document's message stream once you have been subscribed.

Working with file attachments

When viewing a plan file, you can:

- Upload file attachments to associate with the plan file.
- View existing attachments for the plan file.
- Manage attachments for the plan file.

To view and work with attachments for the current file, click the attachments icon in the Task bar. The **File Attachments** panel displays all existing attachments. If the plan file does not currently have any attachments, the panel is empty.



Example plan file attachments

Attachments are listed in the order they were uploaded or modified, with the most recently uploaded or modified file listed at the top. The name of the user who uploaded the attachment is also listed.

> **NOTE:** The File Attachments icon is displayed only if attachments are enabled for the file group to which the plan file belongs.

Uploading attachments

You can upload a new file attachment for the current plan file if you have read/write access to the plan file.

To upload a new attachment:

1. Click **Upload Attachment** at the top of the File Attachments panel.
2. In the **Open** dialog, select one or more files to upload. This dialog is the normal file explorer dialog for your operating system.
3. Click **Open** to upload the selected files and attach them to the current plan file.

After the upload is complete, the new attachments are displayed in the File Attachments panel. These attachments are available to all users with access to the plan file, in any Axiom client.

NOTES:

- By default, an individual file attachment cannot exceed 10MB. If you upload multiple file attachments at the same time, the total size of all attachments cannot exceed 50MB.
- If you upload a file attachment with the same name as an existing file attachment, the new attachment overwrites the existing attachment.

Downloading and opening attachments

All users with access to a plan file can download and open existing file attachments for the plan file. To open an attachment, you can do either of the following:

- Click the attachment file name in the File Attachments panel.
- Click the download icon underneath the attachment name. To access the attachment management icons, hover your cursor over the attachment in the File Attachments panel.

The behavior of the download depends on the browser that you are using and its settings. You may have the option to open the attachment directly orsave the attachment locally first. Your computer or device must have a program that is capable of opening the attachment's file type.

When you open an attachment from the Web Client, the attachment does not have any link back to the Axiom database. If you modify the contents of the file, the modification is not saved to the database. If you need to modify the contents of the file in the database, you must edit and save the file locally and then upload the attachment again.

Editing attachments

You can edit the file name of the attachment and its description. If an attachment has a description, the description is displayed underneath the file name. You must have read/write access to the plan file to edit an attachment.

It is not possible to directly edit the contents of an attachment using the Web Client. If you need to modify the contents of the attachment, you must edit and save the file locally, and then upload the attachment again.

To edit the name or description of an attachment:

1. Click the edit icon underneath the attachment name. To access the attachment management icons, hover your cursor over the attachment in the File Attachments panel.
2. In the **Edit File Attachment** dialog, edit the **File Name** and **Description** as needed, and then click **OK**.

Axiom displays the revised file name and description in the File Attachments panel.

▶ Deleting attachments

You can delete an attachment if it is no longer needed. You must have read/write access to the plan file to delete an attachment.

To delete an attachment, click the delete icon underneath the attachment name. To access the attachment management icons, hover your cursor over the attachment in the File Attachments panel.

Managing announcements in Axiom forms

Use the Announcement component in an Axiom form to add, edit, and delete announcements.

As a best practice to provide full announcement management capabilities, create an Axiom form that is only intended for use by announcement administrators. Include an Announcement component on the form and configure it as follows:

- Enable **Show All Announcements** so that announcement administrators can view and edit future and expired announcements. Otherwise, Axiom does not display future and expired announcements in the component and they cannot be accessed.
- Size the component to a tall height so that announcement administrators can view many announcements without scrolling.

> **NOTE:** The ability to manage announcements is available only to administrators and to users with the **Administer Announcements** security permission. Users without these permissions only see announcements within the component; they do not see any of the editing controls.

> **IMPORTANT:** Product-delivered landing pages use a different Announcements component than the one detailed here for use in Axiom forms. For more information on managing announcements in product-delivered landing pages, see the separate documentation for the product.

▶ Adding announcements

You can add announcements using any Announcement component in an Axiom form. All announcements that are created using a component are saved to the same central repository and are available to all Announcement components in the system. It does not matter whether the current Announcement component is filtered to only display certain categories; you can still use the component to create a new announcement for any category.

To add an announcement:

1. Click the plus icon in the top right corner of the Announcements component.
2. In the **Add Announcement** dialog, complete the following announcement properties:

Item	Description
Category	The category for the announcement. All announcements must have a category. Categories can display different announcements to different audiences by configuring Announcement components to only show announcements for certain categories. By default, the first category in the list is selected. To use a different category, select it from the list. To create or edit a category, click **Manage Categories**. If your organization does not use different categories, all announcements are assigned to the default **General** category.
Start Date	The date that you want the announcement to be available to users. By default, this is today's date. If you do not want Axiom to display the announcement until some point in the future, select a future date. Axiom does not display the announcement in any Announcement components until that date (unless **Show All Announcements** is enabled for the component).
Expire Date	Optional. The date that you want Axiom to stop displaying the announcement to users. You can specify a date so that the announcement is automatically hidden after the expiration date is reached or leave it blank so that the announcement continues to be displayed until it is deleted by an announcement administrator. The expiration date must be after the start date and cannot be today's date.
Title	The title of the announcement. The title text is what appears to users in the announcement component. The title text may be the entirety of the announcement. For example, you could define a title such as "Reminder: All budgets due today!" with no additional message text. If the title text is too long for Axiom to display in the Announcement component , an ellipses appears at the end of the visible text. Users can click the **view** link to view the full announcement text.
High Importance	Optional. Select this check box to display the announcement with high importance. In the Announcement component, a red exclamation point appears next to the announcement.

Item	Description
Message	Optional. The message text of the announcement. Use the text box to define the message text. The text can be multiple lines and can use bold, italic, and underlined text. Message text is not displayed within the Announcements component. If message text is defined, the announcement has a **view** link. Users can click this link to view the full announcement text (title and message).

3. Review all announcement settings, and then click **Save**.

If the start date is today, the saved announcement is immediately available to all Announcement components and is visible in any components that are configured to display the announcement's assigned category. If a user currently views a form with an Announcement component, the new announcement is not displayed until the form is updated by using a Button component or any other component that is configured to auto-submit.

▶ Editing announcements

You can edit any announcement that is currently displayed in an Announcement component in an Axiom form. We recommend you use an Announcement component that is configured with **Show All Announcements** enabled so that you have access to all available announcements.

If the Announcement component that you use for editing does not have **Show All Announcements** enabled, you cannot edit the following announcements because they are not displayed in the component:

- Announcements with start dates in the future
- Announcements that reached their expiration dates
- Announcements that were filtered from being displayed by using the **Limit Categories To** option.

To edit an announcement:

1. Hover your cursor over the row of the announcement to edit so that the editing icons are displayed on the right side of the row. Click the pencil icon to edit the announcement.
2. In the **Edit Announcement** dialog, edit the applicable announcement settings. Note the following:
   - Changing the announcement category may prevent the announcement from being displayed in certain components, and to start being displayed in other components, depending on which categories those components are configured to show.
   - Changing the start date to the future prevents the announcement from being displayed in any components (except components with **Show All Announcements** enabled).
   - It is not possible to change the expiration date to today to hide the announcement immediately. You must delete the announcementto immediately stop it from being displayed.

3. Review all announcement settings, and then click **Save**.

Changes to announcements take effect immediately. If a user views a form with an Announcement component, the changes are not displayed until the form is updated by using a Button component or any other component configured to auto-submit.

Deleting announcements

You can delete any announcement that is currently displayed in an Announcement component in an Axiom form. We recommend you use an Announcement component that is configured with **Show All Announcements** enabled, so that you have access to all available announcements.

If the Announcement component that you use for deletion does not have **Show All Announcements** enabled, you cannot delete the following announcements because they are not displayed in the component:

- Announcements with start dates in the future
- Announcements that have reached their expiration dates
- Announcements that have been filtered from being displayed using the **Limit Categories To** option.

If you delete an announcement, it is not recoverable. Verify that you no longer need the announcement before you delete it.

> **NOTE:** When an announcement expires, it is not immediately deleted from the Axiom database. Expiration means that the announcement is no longer displayed in the component (except for components with **Show All Announcements** enabled). To remove the announcement from the database, you must delete it.

To delete an announcement:

- Hover your cursor over the row of the announcement to delete so that the editing icons are displayed on the right side of the row. Click the trash can icon to delete the announcement.

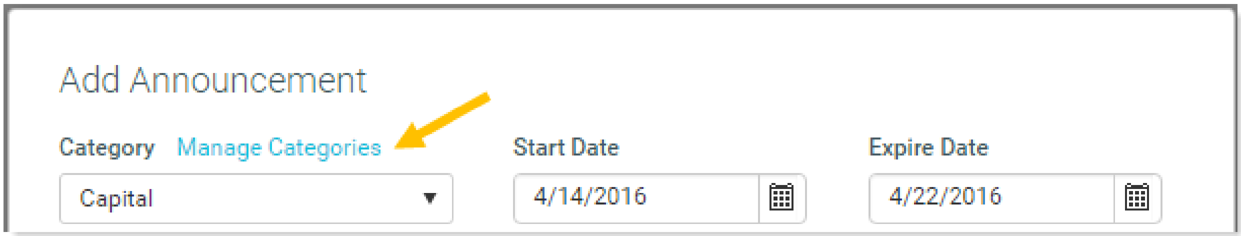
The announcement is deleted immediately. If a user views a form with an Announcement component, the announcement is not removed until the form is updated by using a Button component or any other component that is configured to auto-submit.

The **System.SystemDataPurge** Scheduler job automatically deletes all expired announcements past a configured time period. By default, this time period is 30 days.

Managing announcement categories

All announcements must belong to a category. If you do not use multiple categories, all announcements are assigned to the default category of General. To use other categories, you must create them.

You can create, edit, and delete categories from the **Add Announcement** or **Edit Announcement** dialogs. Click the **Manage Categories** link above the **Category** drop-down list.



In the **Manage Categories** dialog, all existing categories are displayed in a grid at the top of the dialog. Within this dialog, you can do the following:

- To add a new category, click **Add a New Category**. Define a **Name** and **Display Text** for the category, and then click **Save**. The new category is added to the grid. The category name must be unique.
- To edit a category, click the category name in the grid, so that the name and text appear below. Edit the text as needed, and then click **Save**. You cannot change category name.
- To delete a category, hover your cursor over the category row until the editing icons are displayed in the right side of the row. Click the trash can icon to delete the category.

  You cannot delete a category if active announcements are assigned to that category—you must first delete these announcements or assign them to another category.

The name of the category identifies the category, whereas the text is displayed to users. You could define a category name of Cap, and the text as Capital. You can later edit the text as needed without changing the underlying ID of the category.

NOTE: When configuring an Announcement component to filter by category, the list of categories is loaded when the file is opened. If you add or remove a category, you must close and reopen the file in order to see the changes.

4

Using plan file processes in the Web Client

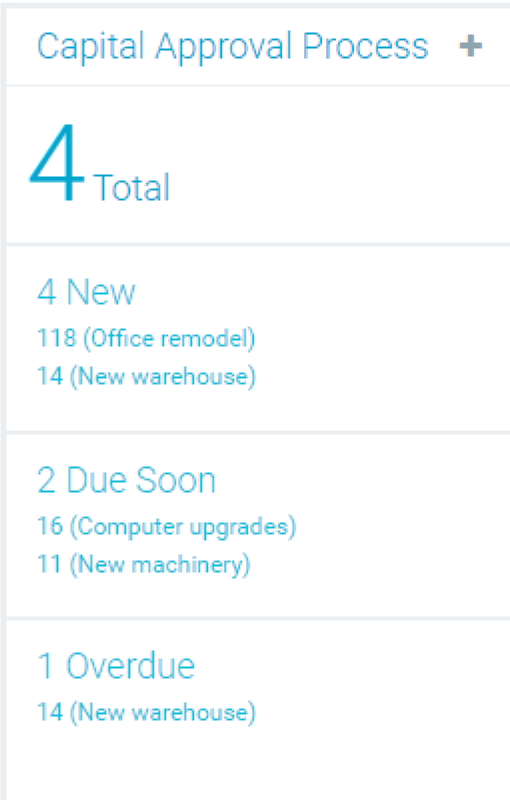
Plan files in a file group can be part of a defined planning process, which is a set of steps for plan files to progress through during a planning cycle. For example, you may have a basic process with two stages—one for managers to develop the plans, and one for the Finance department to review and approve them. Or, you may have a multistep plan that includes several passes of plan development, and multiple levels of review.

For each defined step of the process, each plan file has a designated owner. When the plan file is in a step, that owner has a plan file "task" to perform one of the following actions:

- Edit the plan file, and then submit it to the next step.
- Review the plan file, and then approve it or reject it.

If you are assigned a plan file process task, it is your responsibility to complete the task by the specified due date. Using the Web Client, you can view and complete your current process tasks and view the progression of your plan files in the process.

In most cases, your home page (or a similar landing page) contains information on your current process tasks for a specific process. This process summary is customizable, but looks similar to the following:



You can complete your current process tasks using the following methods:

- Depending on how your plan files are designed, you mighty be able to complete the current task for a plan file by using a button within that plan file.
- You can go to the Process Directory page, which displays the process status of all plan files to which you have access in a specific process. You can also complete tasks using this page. Click the number links in the process summary to access this page.
- You can go to the Process Routing page for a specific plan file, which displays information about the plan file's progression through the process. If you are the current task owner, you can also complete the task from this page. Clicking the plan file links in the process summary provides acess to this page.

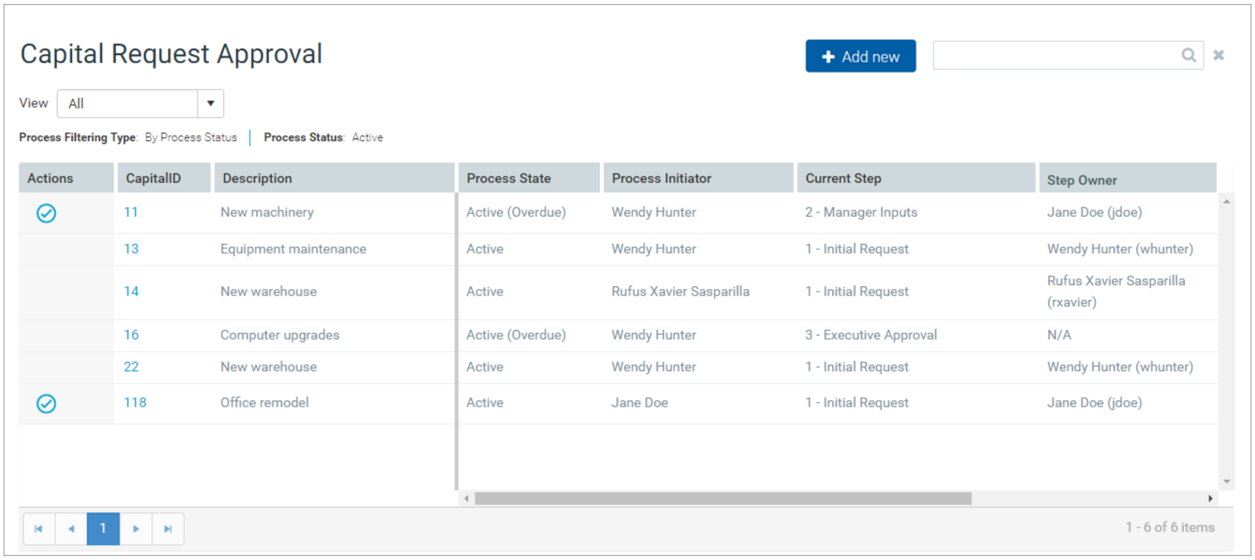
Managing your process tasks

Use the Process Directory page to view the current process status for all plan files to which you have access within a specific file group. If you are the current step owner of one or more plan files, you can also complete process tasks from this page.

You can access this page using either of these methods:

- Click the total task numbers in the Process Summary component. The Process Summary component might be included on your home page (or a similar landing page). It displays information such as your total current tasks and your total new tasks.
- Your system might have been designed to include links to this page within other forms to which you have access, such as your home page.

The directory shows the full list of plan files that you have security permission to access in the file group, as well as various columns with information about the process status for each plan file. The following columns are defined at the file group level and cannot be changed in the Web Client.



Example Process Directory page

To search for a specific plan file, you can use the use the search box at the top of the page. You can also sort most columns by clicking the column header. Some process columns, such as owner and due date, do not support sorting.

The directory has three different views that you can select from the top of the page.

- **All**: Shows all plan files wo which you have access in the file group. This is the default page view if you navigate directly to the page.
- **My Current Tasks**: Shows just the plan files in which you are the current process task owner. This is the default page view if you navigate to the page from the Process Summary component.
- **My Requests**: Shows the plan files in which you are the process initiator. Typically, the process initiator is the user who created the plan file. This view is only available for plan file processes in on-demand file groups.

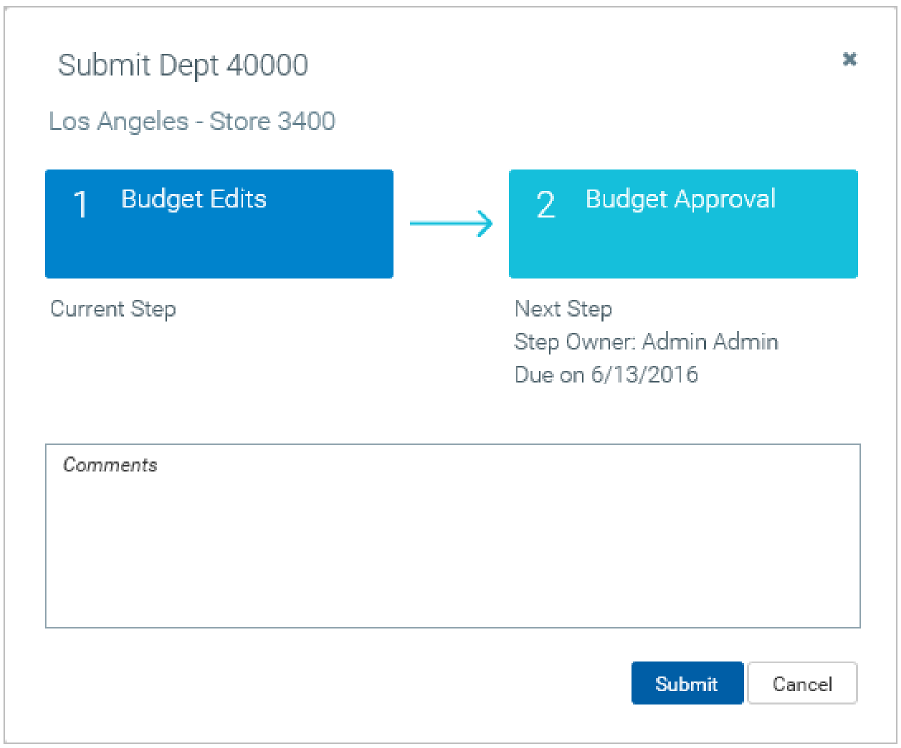
▶ Completing process tasks

Using the icons in the **Actions** column, you can complete the current process task for the plan file. The action icons are available only if you are the current step owner for the plan file or an administrator, process owner, or process group owner.

To complete a task, click the appropriate icon next to the plan file name:

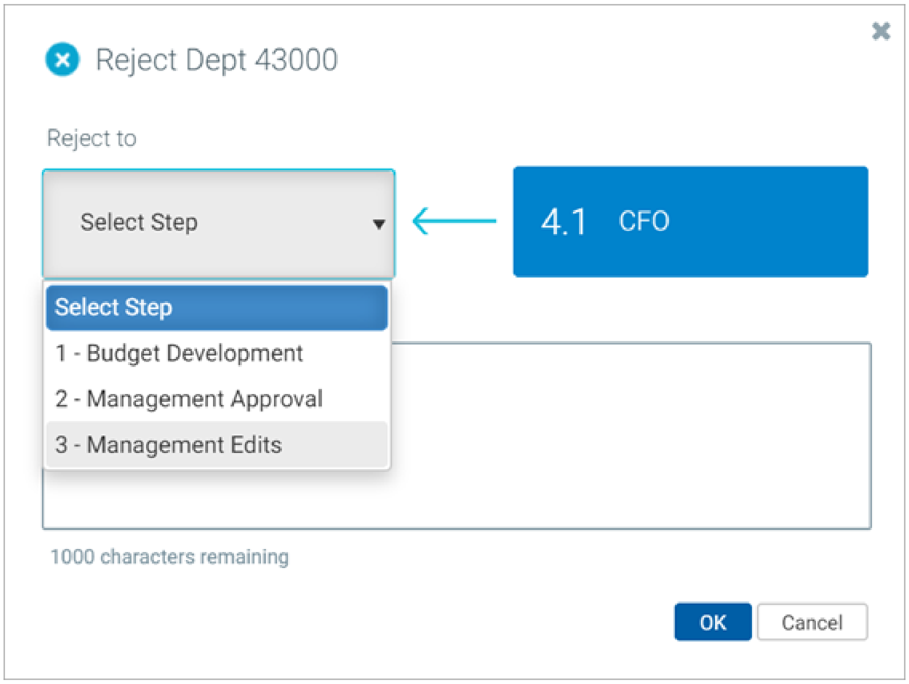
- Click the check mark icon to **Submit** or **Approve** the plan file (depending on the step type). This action moves the plan file to the next step.
- Click the **X** icon to **Reject** the plan file. This action returns the plan file to a prior step. The reject action is only available for approval steps.

In either case, the **Process Action** dialog displays the current step of the plan file and the step that it will be moved to. You can enter a comment into the **Comments** box. The comment is saved in the process history and included in any notification to the next step owner.



Example Process Action dialog to complete a process task

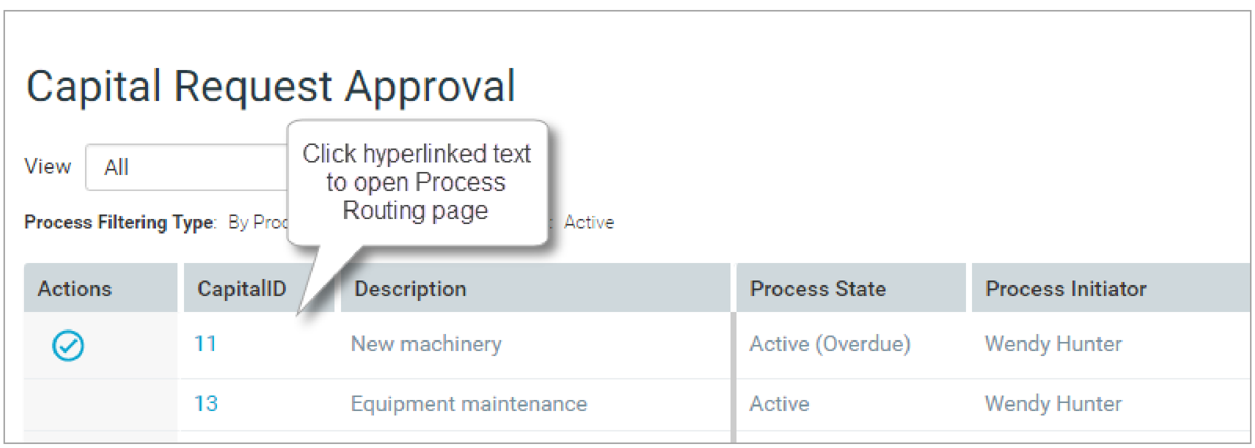
When rejecting the plan file,you may have the option to select the step that you want the plan file to return to. In this case, the process diagram at the top of the dialog is interactive so that you can select the target step.



Example Process Action dialog with a user-selected rejection step

Viewing process history

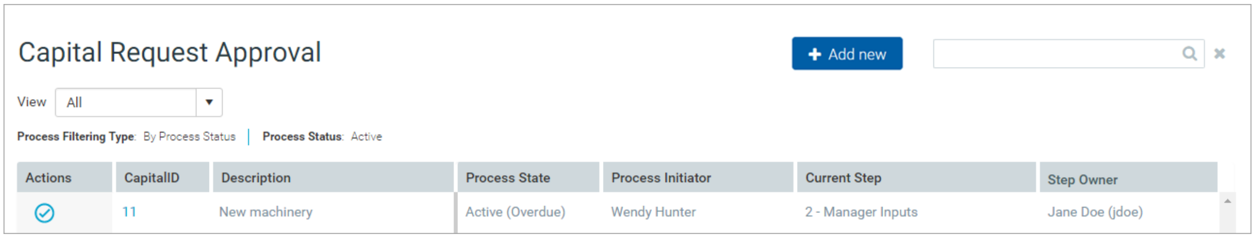
To open the Process Routing page for a plan file, click any column value that displays blue hyperlink text. The column that contains the hyperlinks is configurable, so it may be different in each system. In the following example, the values in the CapitalID column are hyperlinks and open the corresponding routing page:



The Process Routing page contains full process details about each plan file, including comments that were made by step owners when completing tasks.

Creating a new plan file

If the current file group is an on-demand file group, you may be able to create a new plan file from this page. If this option is available to you, click the plus icon at the top of the page to create a new plan file. This plus icon is displayed along with customizable text, so it may be different in each system. In the following example, the custom text is **Add new**.



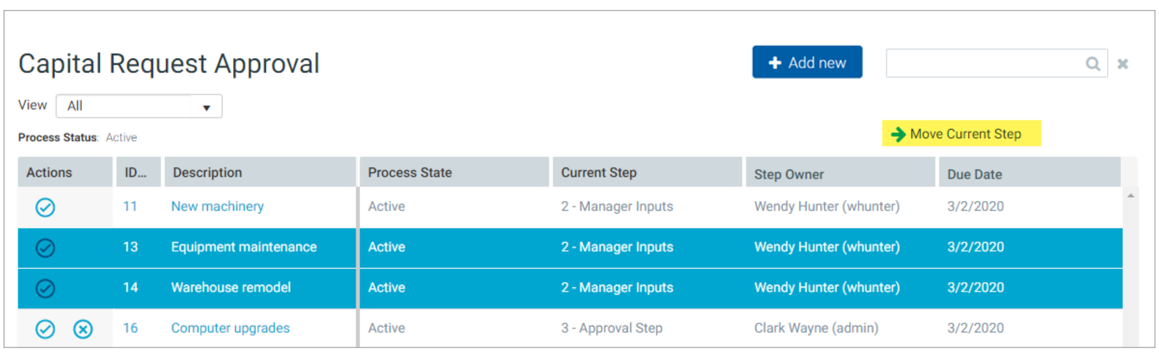
The specific process for creating the new plan file depends on the file group configuration.

Moving plan files to different steps

If you are an administrator or process owner, you can move plan files to different steps as needed. This action is intended for administrators to adjust the current step of certain plan files without requiring to restart the process. When a plan file is moved to a different step, the currently active step is aborted instead of completed, and the plan file becomes active in the target step.

To move one or more plan files to another step:

1. Select the plan files that you want to move. If you only want to move a single plan file, click the row for that plan file to select it. You can use the **SHIFT** and **CTRL** keys to select multiple rows.
2. Click **Move Current Step** to move the selected plan files. In the following example, two plan files are selected to be moved:

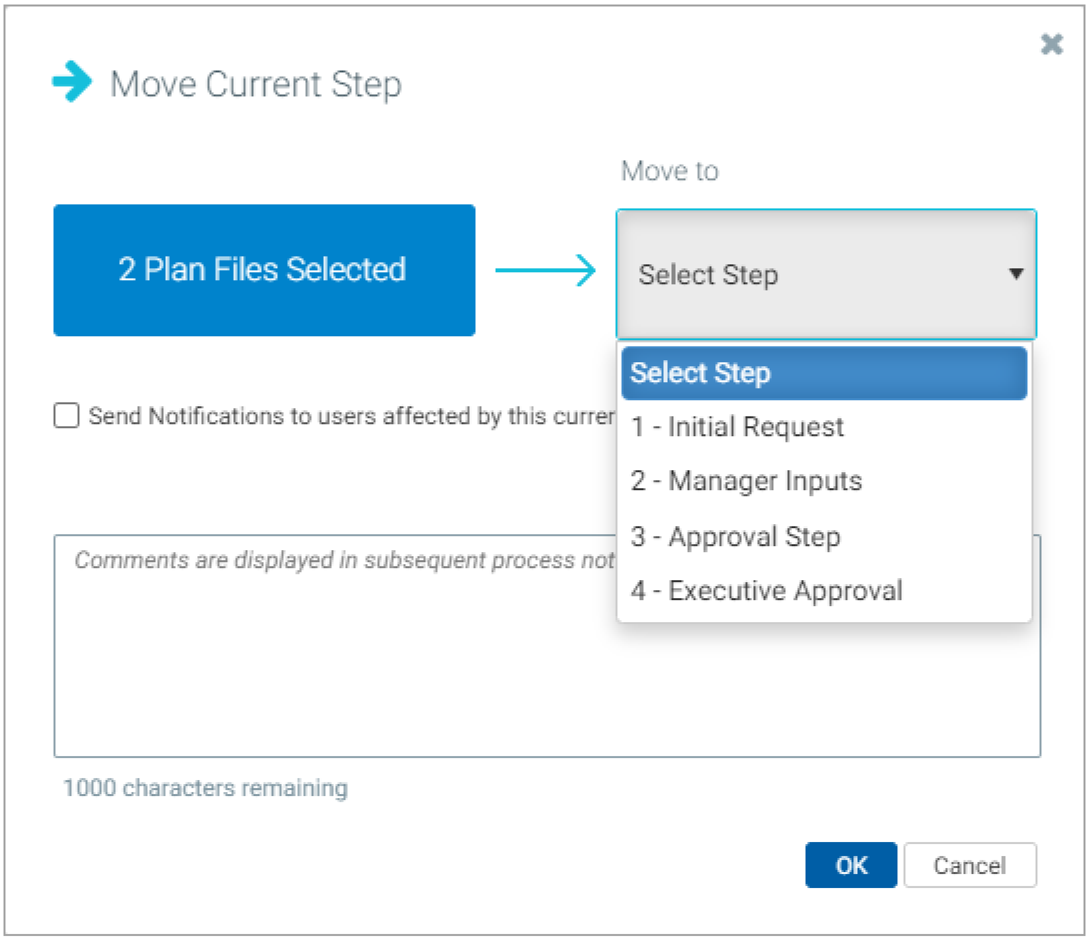


3. In the **Move Current Step** dialog, do the following:
    - Use the **Select Step** drop-down list to select the step to move the plan files to.

- To send notifications to the new step owners for the target step, select **Send notifications to users affected by this current step change**. When you select this check box, you can also enter a comment to include in the notification and store with the process. By default, notifications are *not* sent to new step owners when moving plan files to a different step.

  If you send notifications, the Step Activated notification is sent for the target step. Because the currently active step is aborted instead of completed, no Step Completed notifications are sent.

- Click **OK** to move the plan files to the target step.



Filtering the directory

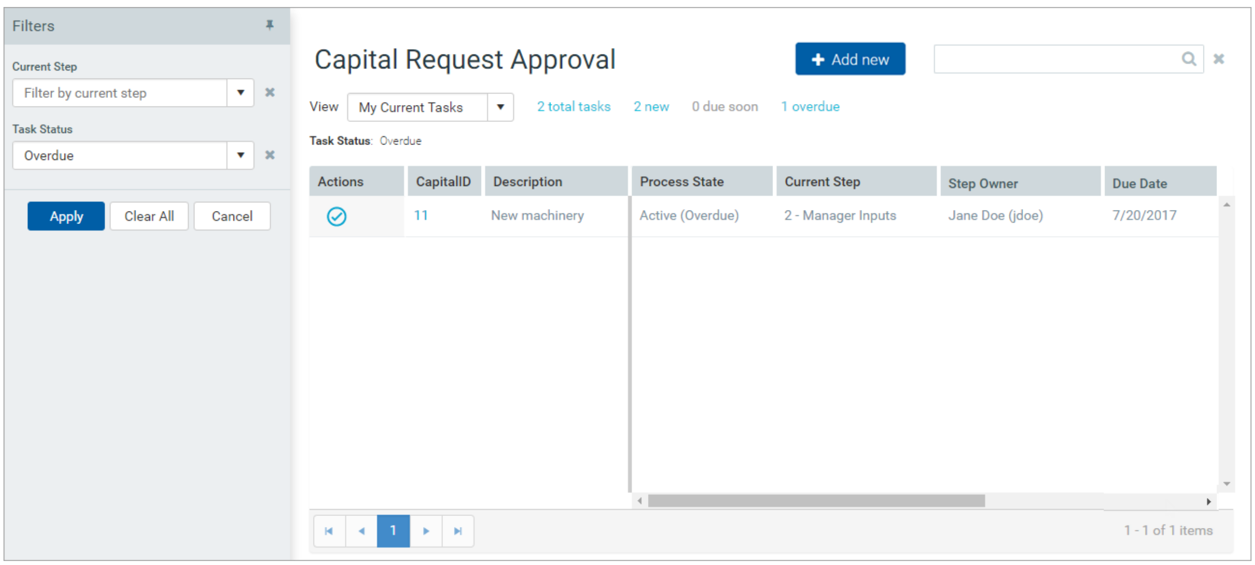
You can filter the directory to only show plan files that meet certain criteria. Click the **Filter** icon in the toolbar to open the **Filters** panel and select values for the filters. When you click **Apply**, your selections are used to filter the directory. The current filter is displayed below the View box for reference.

Filters for My Current Tasks

When the view is My Current Tasks, you can filter the directory using the following options:

- **Current Step**: Show your current tasks for a specific step. By default, the view shows tasks for all steps.
- **Task Status**: Show your current tasks based on task status, such as whether the task is new, due soon, or overdue. By default, the view shows tasks in all statuses. However, if you navigate to the page from the Process Summary component, the view is automatically filtered based on the header you clicked. For example, if you clicked "3 due soon," the view is filtered to show only the due soon tasks.

The task status filters are available in the Filters task pane and also using links along the top of the page. You can click any of these links to quickly filter the list based on task status.

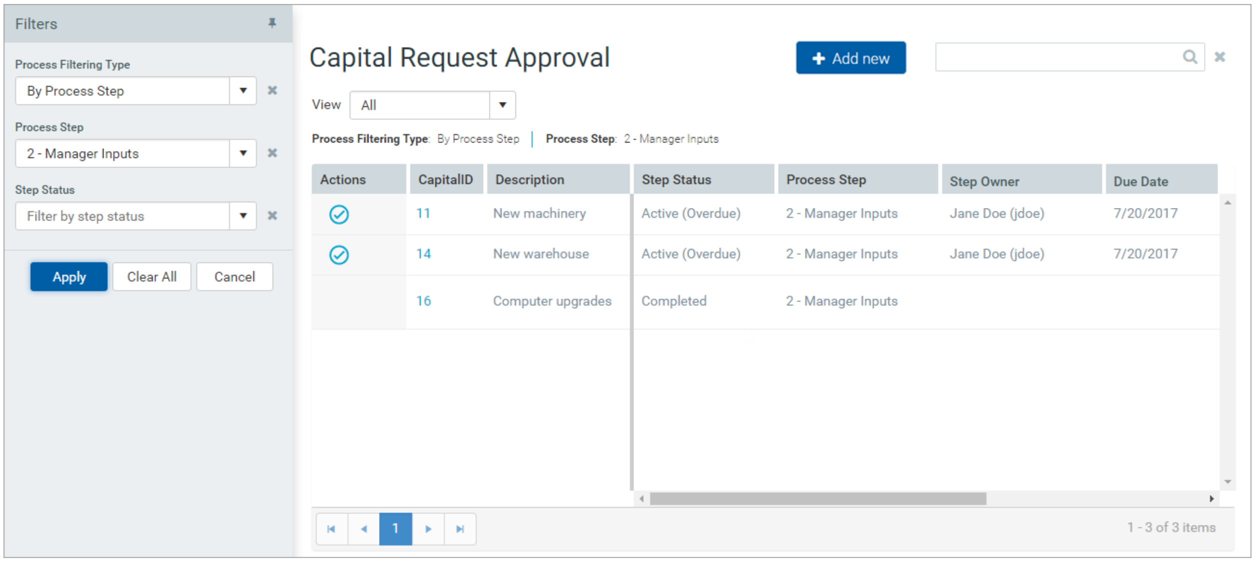


Example My Current Tasks view with filters

Filters for other views

When the view is All or My Requests, you can filter the directory by various process status properties or step properties. The filters vary based on the **Process Filtering Type**:

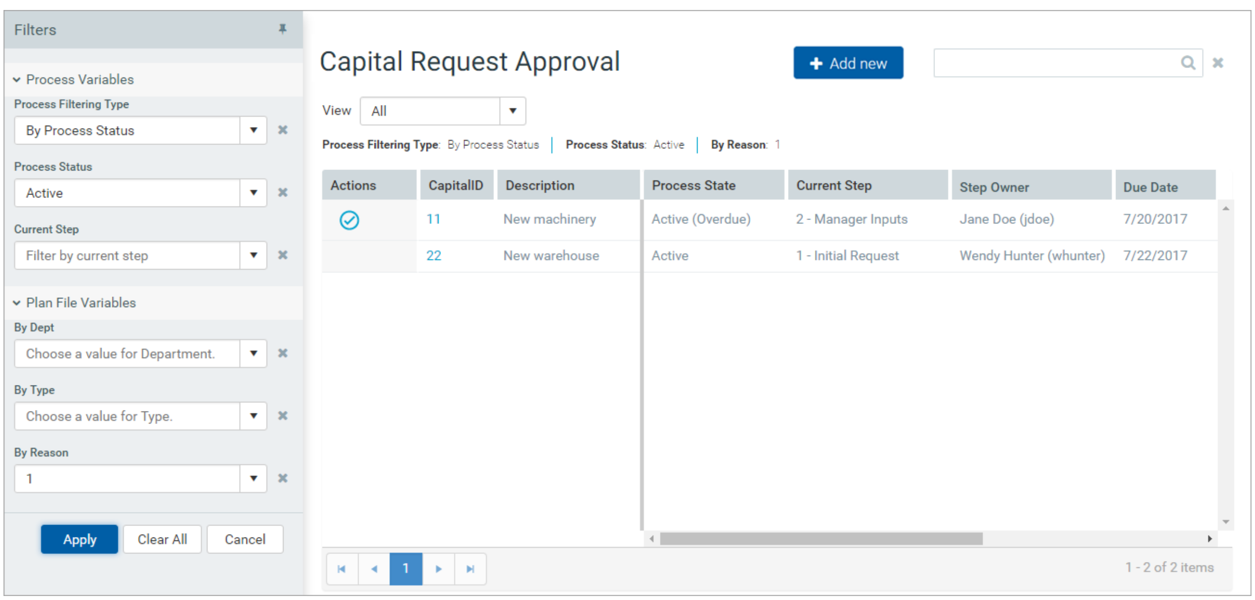
- **By Process Status** (default): The view allows filtering based on each plan file's overall process status and current step.
- **By Process Step**: The view allows filtering based on each plan file's status for a specific step. By default, if no step status filter is applied, the view shows all plan files that were ever active in the selected step. Plan files that have not been started or that skipped the step are not displayed.
- **By Current Owner**: The view allows filtering based on each plan file's current owner. You can further filter the view by task status and specific step.



Example All view with step status filters

Custom filters

Your organization may have defined additional custom filters to allow filtering the directory by plan file attributes. If present, these filters displayed below the built-in process filters.



Example custom filter options at bottom of Filters panel

Process grouping

If the plan file process uses a grouping column, you can also filter the list by groupings. For example, the process may use Entity as a grouping column. If you have access to plan files in Entity 1 and Entity 2, you can filter the list by those groupings.

Viewing process routing details for a plan file

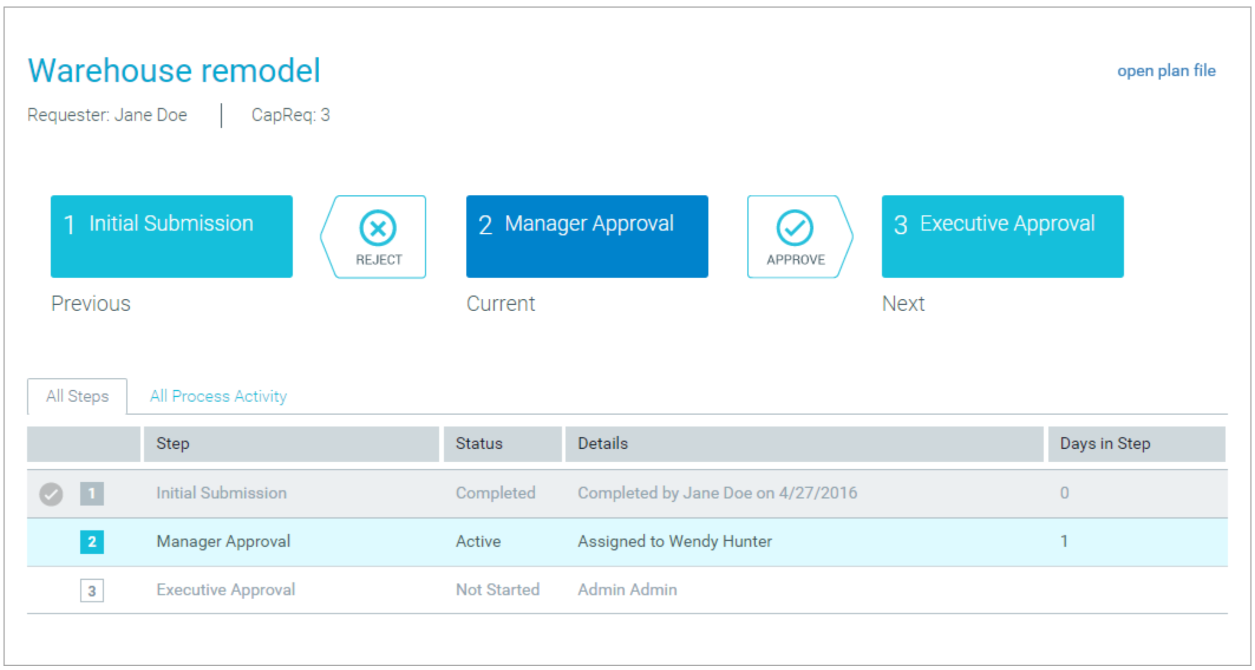
Use the Process Routing page to view the current process status and details for a specific plan file, and then open that plan file. If you are the current step owner, you can also complete the task from this page.

You can access the Process Routing page by:

- Clicking a plan file name in the Process Summary component. The Process Summary component may be included on your home page (or a similar landing page). It displays information such as your total current tasks and your total new tasks.
- Clicking a hyperlink in the Process Directory page. This page is configurable. The hyperlinks may be present on any column in this page.

Your system may be designed to include links to this page within other forms to which you have access.

NOTE: This page is only available to users if the process has been configured for viewing, using the option **Make routing page visible to anyone with read access to the plan file** in the process definition. If the built-in links to this page are not available, or if a permissions error occurs when you try to access the page directly using a URL, this option isn't disabled for the process.



Example Process Routing page

Any user who can access the plan file can access this page, but only the current step owner can complete the task. If you are not the current step owner, the action buttons are grayed out.

In this page, you can view the following information:

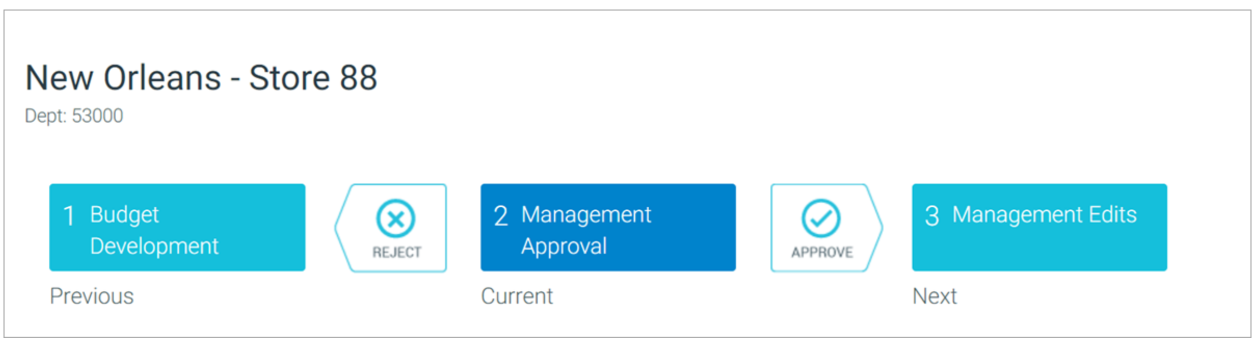
- The top of the page displays the current step of the plan file, as well as the next step in the progression. If the current step is an approval step, the previous step is also shown because the plan file may be rejected back to it.
- The **All Steps** tab displays the plan file's status in the full step progression. You can view which steps have been completed or skipped, the current step, and future steps. To view the most recent comment associated with any step, hover your cursor over the **Details** column for the step.
- The **All Process Activity** tab shows the complete process details for the plan file, including activities such as step activation and completion, task regeneration, and comments that were made when completing tasks.

To open the plan file from this page, click the **open plan file** link in the top right-hand corner of the page. You can customize the name of this link.

▶ Completing the current process task

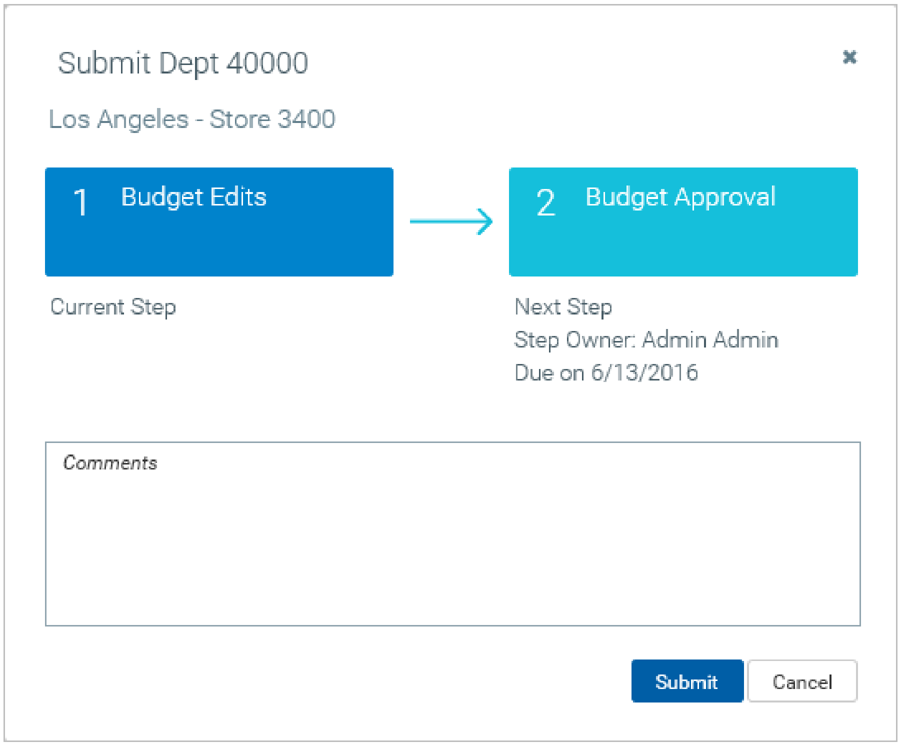
If you are the current step owner, you can complete the process task for the plan file by clicking the appropriate action buttons at the top of the page. Administrators and process owners can also complete the task using this method.

- If the current step is an Edit Plan File step, click **Submit** to submit the plan file to the next step.
- If the current step is an Approval step, click **Approve** to approve the plan file and move it to the next step, or **Reject** to reject the plan file and return it to the prior step.



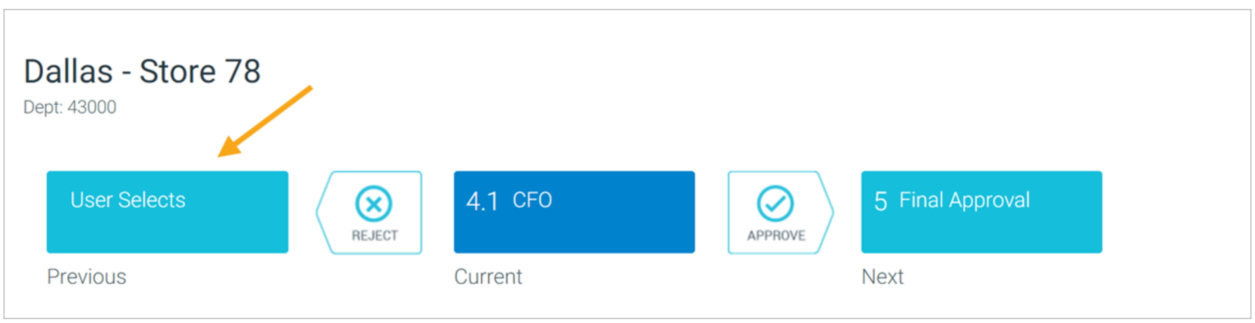
Example process flow diagram with action buttons to complete the task

Clicking any of these actions opens the task completion dialog. In this dialog, you can enter a comment to be stored in the process history and send it to the next step owner.

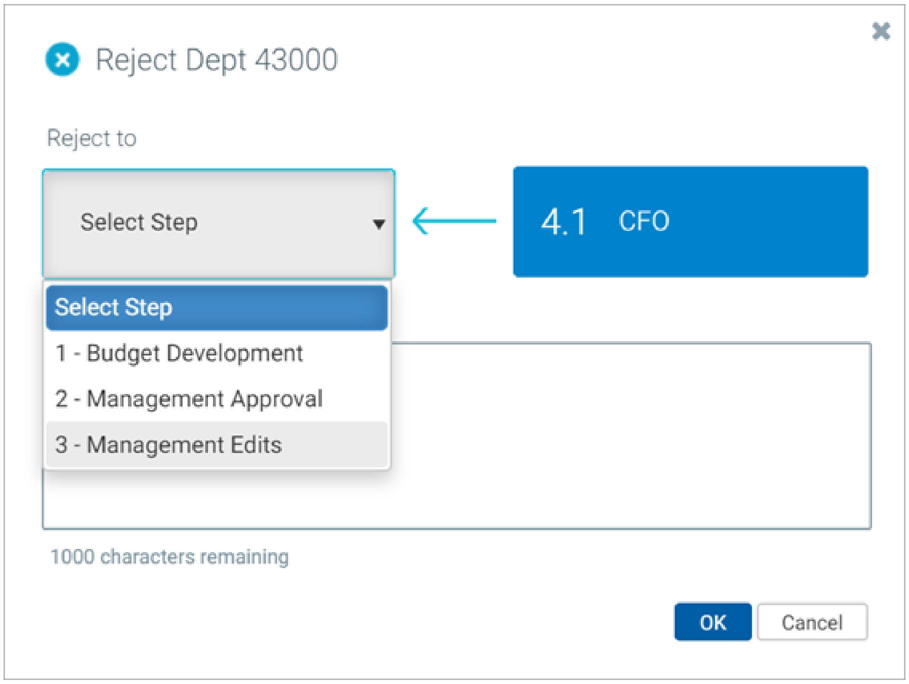


Example task completion dialog

When rejecting the plan file, you might have the option to select the step to which you want the plan file to return. In this case, the process flow diagram shows the text **User Selects** in the process diagram at the top of the page.



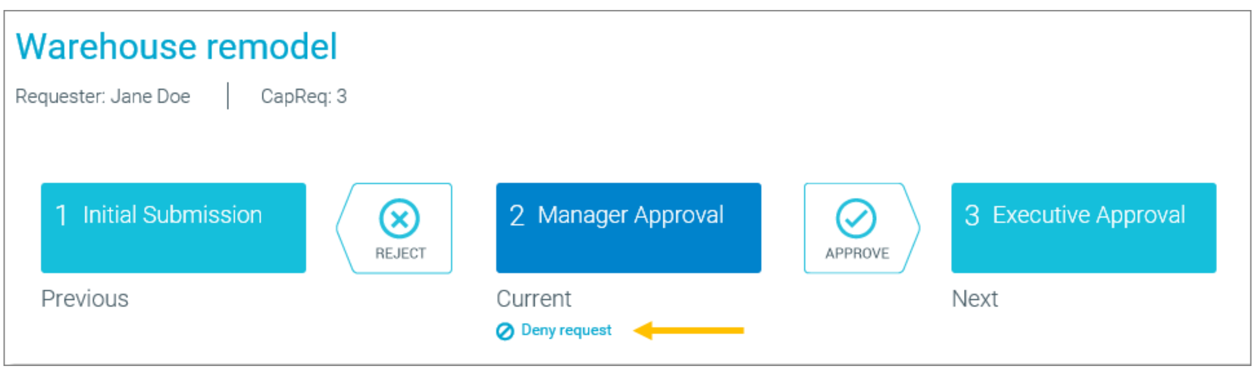
When you click **Reject**, the task completion dialog gives you the option to select the target step for the rejection.



Example task completion dialog with a user-selected rejection step

▶ Denying a request (aborting a plan file in the process)

Some approval steps in the process may provide the option to abort the process for the plan file which stops the plan file in the process and prevents it from progressing further. By default, this action is called **Deny request**, but the text may be customized. If available, this option is presented underneath the current step, as shown in the following example:



Example deny option for approval steps

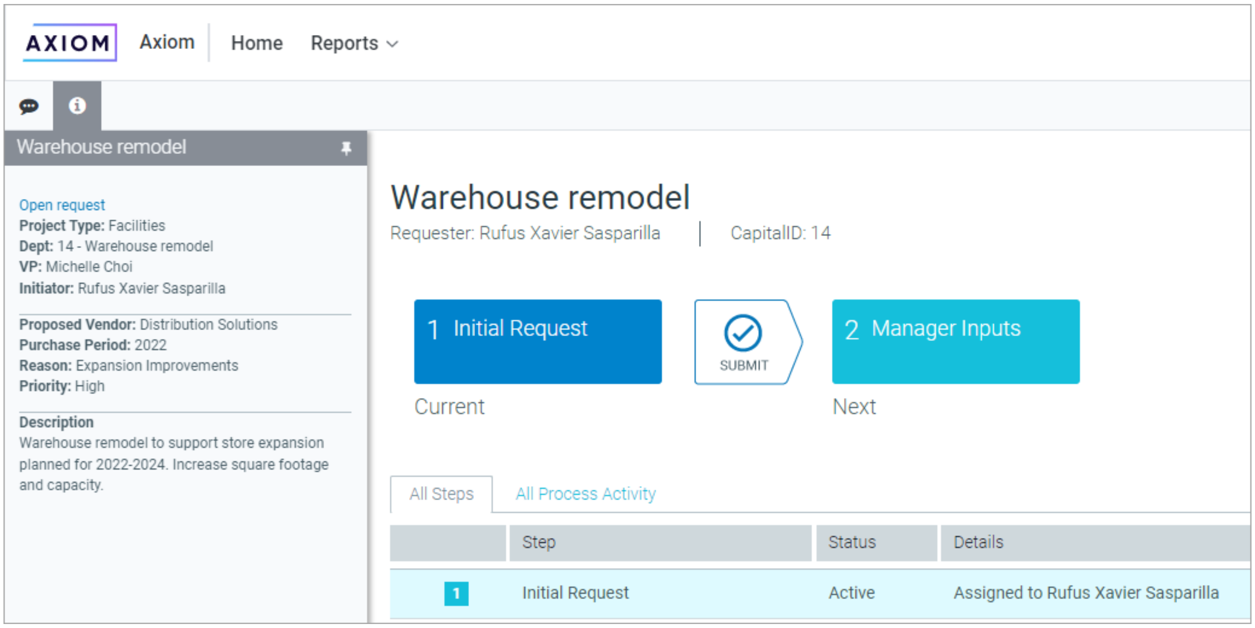
If you deny the request and abort the plan file in the process, the plan file is effectively removed from the process. You are given the opportunity to enter an optional comment to explain the denial.

NOTE: The denial action cannot be reversed. After a plan file has been aborted in the process, only a process administrator can restart it if necessary.

Viewing plan file information

If the process is configured to show plan file information on the Process Routing page, the Information panel opens automatically and is pinned when you access the page. This panel shows details about the plan file, which may be useful in determining whether you are ready to complete the process task. The panel may also include a link to open the plan file.

You can toggle this panel to open and close it by clicking the **Information** icon .



Example information panel

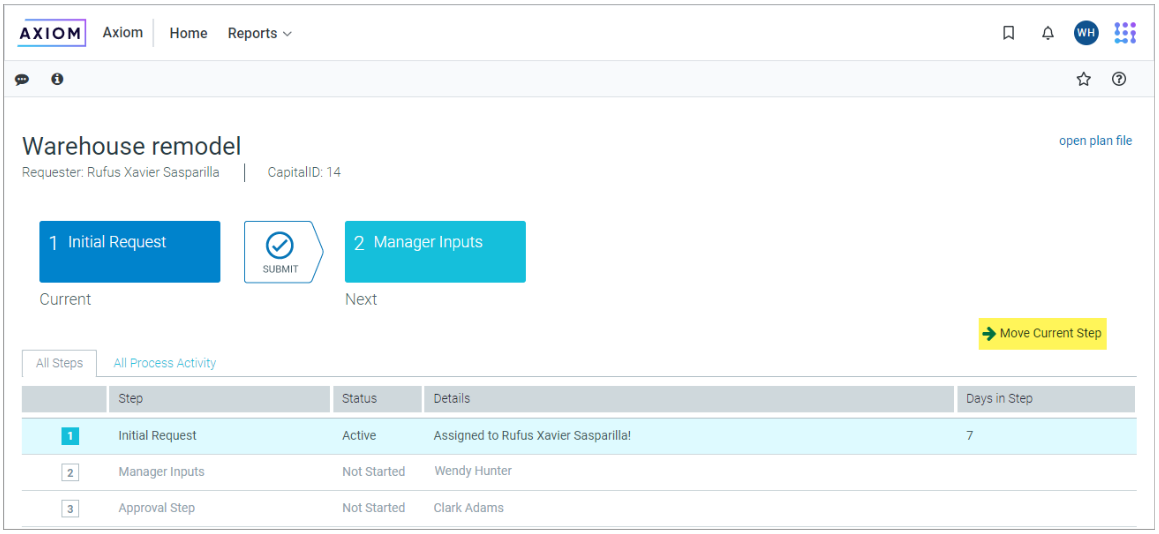
The message stream for the plan file is also available from this page so that you can view and add comments about the plan file. Click the **Message** icon to open the Message Stream panel. For more information on the message stream, see Commenting on form documents.

Moving the plan file to a different step

If you are an administrator or process owner, you can move the current plan file to a different step as needed. This ability is intended as an administrative function to adjust the current step of the plan file without the need to restart the process. When a plan file is moved to a different step, the active step is aborted instead of completed, and the plan file becomes active in the target step.

To move the plan file to a different step:

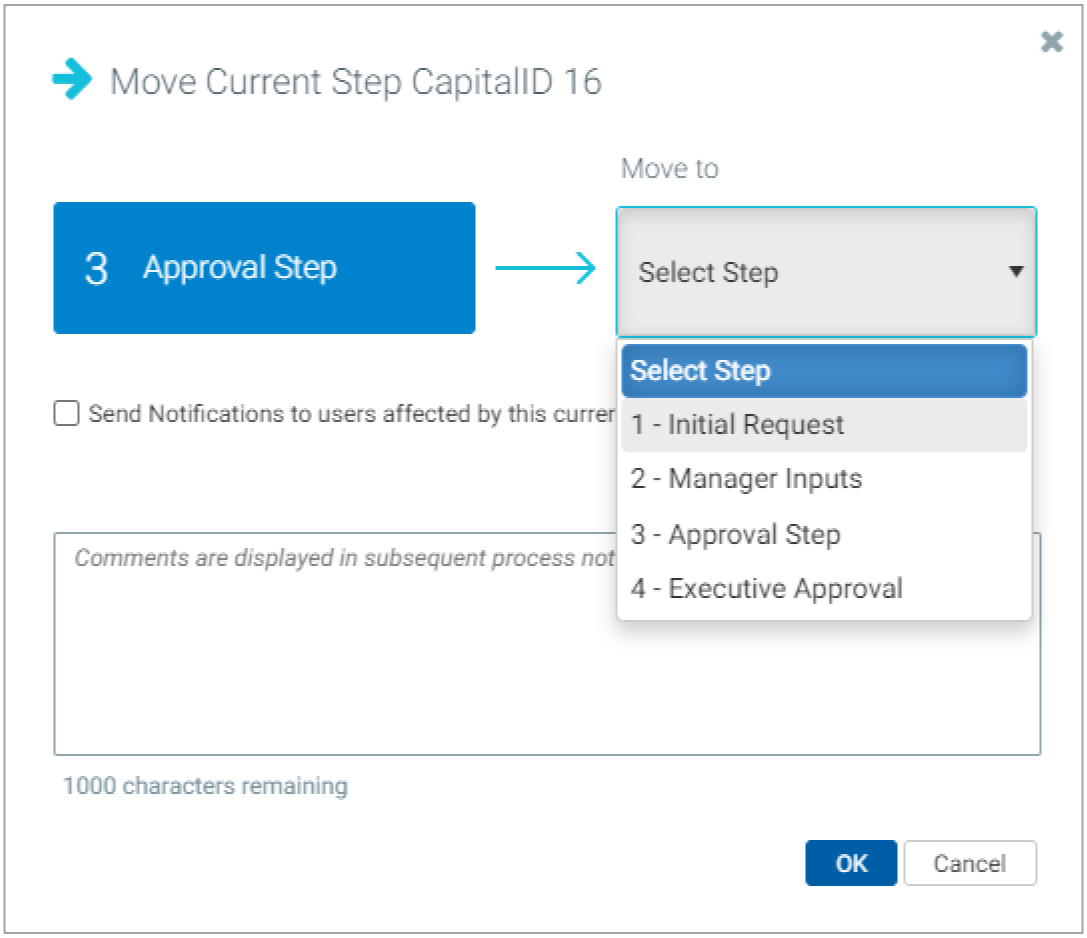
1. Click **Move Current Step**.



2. In the **Move Current Step** dialog, do the following:

    - Use the **Select Step** drop-down list to select the step to which to move the plan file.
    - To send notifications to the new step owner for the target step, select **Send notifications to users affected by this current step change**. If you select this check box, you can also enter a comment to be included in the notification and stored with the process. By default, notifications are *not* sent to new step owners when moving plan files to a different step.

      If you send notifications, the Step Activated notification is sent for the target step. Because the currently active step is aborted instead of completed, no Step Completed notifications are sent.
    - Click **OK** to move the plan file to the target step.



Reporting on time in step for a plan file process

Using the Time-in-Step page of the Web Client, process administrators can report on the average time plan files spend in each step. This report can assist in identifying bottlenecks in the process. Only administrators and process owners can access this report.

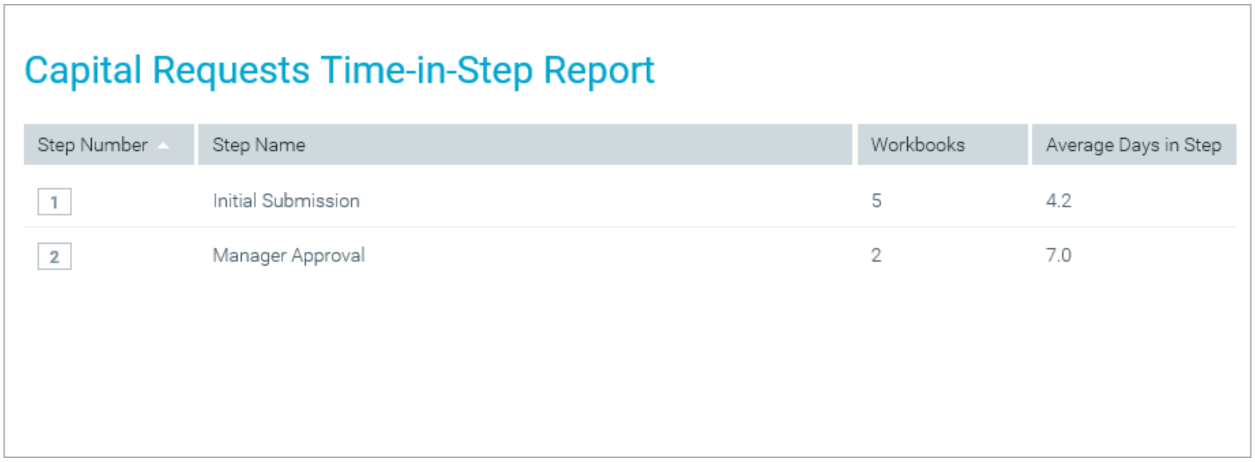
To access this page, use the following URL:

```
<baseURLtoAxiom>/process/processID/metrics
```

For example, if the process ID is 5988, the URL would look as follows:

```
https://ClientName.axiom.cloud/process/5988/metrics
```

In most cases, the URL is already generated and included on your home page or other landing page for process administrators. No other method is available to look up the process ID for a specific process from the Web Client; you do this in the Desktop Client using either Axiom Explorer or the GetProcessID function.



Capital Requests Time-in-Step Report

Step Number	Step Name	Workbooks	Average Days in Step
1	Initial Submission	5	4.2
2	Manager Approval	2	7.0

Example Time-in-Step Report

By default, this page shows the average total time plan files spends in each step. The calculation includes any plan file that spent any time in the step, including:

- Plan files that are still active in the step
- Plan files that completed the step
- Plan files that were active but aborted out of the step (due to moving the plan file to a different step)

If a step is reopened for a specific plan file (due to a plan file being rejected back to the step), the time in step is not restarted for that plan file. Instead, the original time in step and the reopened time in step are added together to arrive at the total time in step.

▶ Filtering the Time-in-Step report

If the time-in-step report for this process is set up with refresh variables, you can use these variables to filter the results. Click the **Filter** icon in the toolbar to open the **Filters** panel and select values for the variables. When you click **Apply**, your selections are used to filter the report.

For example, imagine that the process is for capital requests, and the Filters panel contains a refresh variable to select a request type. If you select **Type 1** and click **Apply**, the report is filtered to show the total average time in step for plan files that are classified as Type 1. The current filter is displayed at the top of the report, underneath the header.

The ability to filter the report and specific filters are determined at the process definition level. If the Filter icon is not present, no refresh variables were defined for the current process. Only the total average time-in-step are displayed.

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W