



# StrataJazz and Axiom Documentation Improvements

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# Agenda

## Why we're here

- Improve customer engagement
- Address ongoing customer and internal feedback
- Align StrataJazz and Axiom deliverables and documentation strategies

## StrataJazz Help Center improvements (October release)

- Updated Help Center page
- New Help template and release notes format
- Improved content strategy
- Feedback prompt

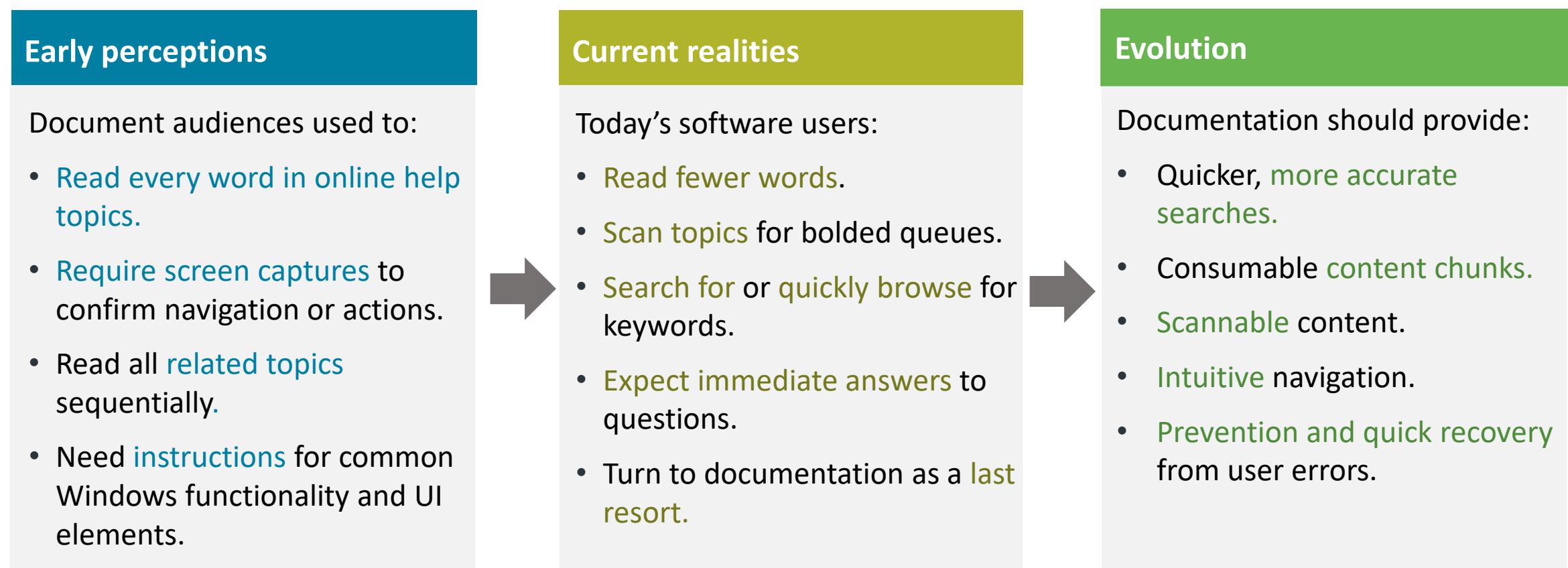
## New Axiom Help Center page (2025.4 release)

- Single portal for access to all Axiom products
- Direct access to StrataJazz Help Center

## Next steps

- Cross-functional communication and training
- Continuous content improvements
- Partnership with the User Research team

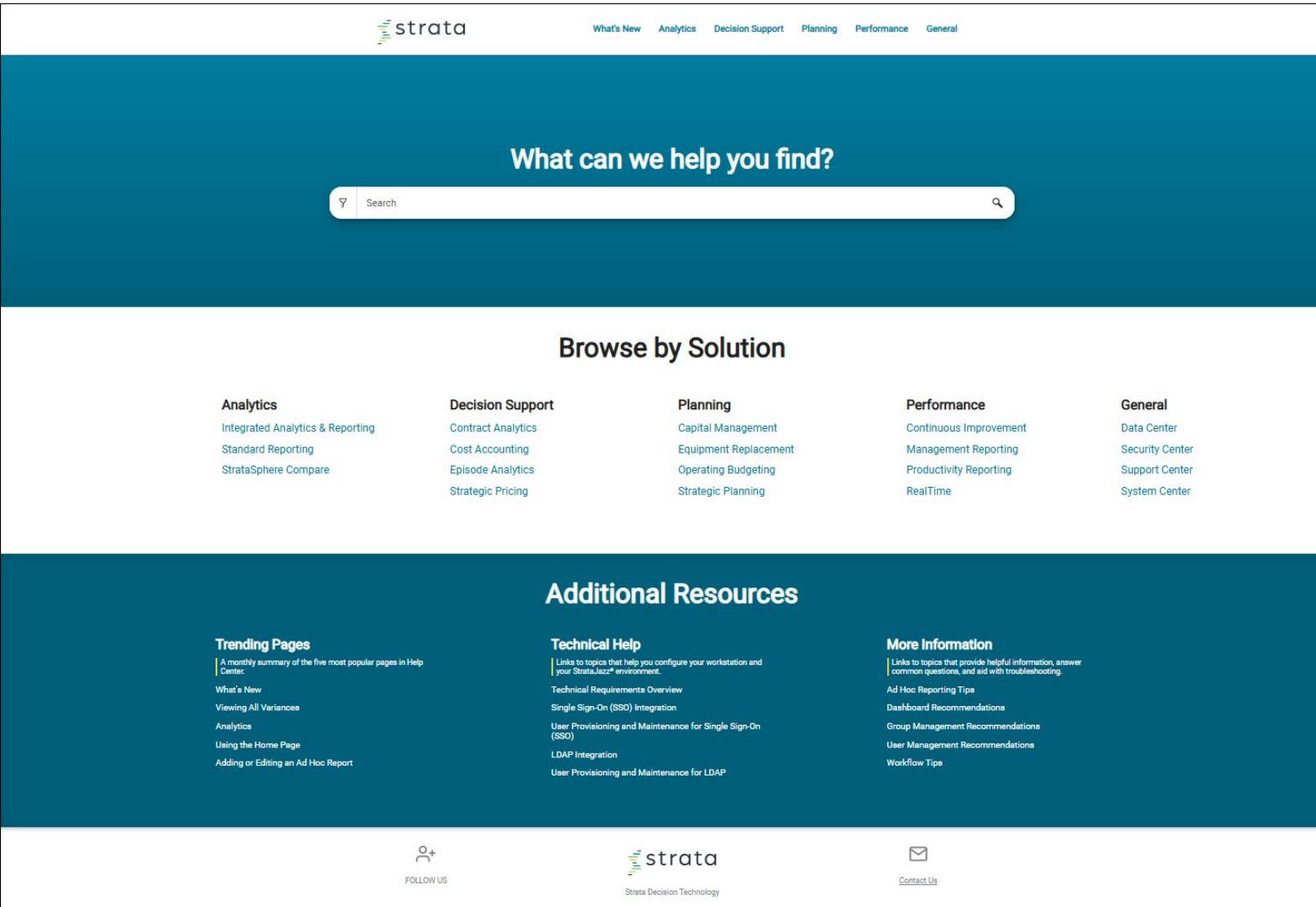
# Improve customer engagement



# Address ongoing feedback

- **Feedback sources**
  - Customer escalations in Salesforce
  - Internal Services or Support staff
  - Analytics
  - Feedback links in Help (emails)
- **Common feedback/concerns**
  - Typos, broken links, outdated screenshots
  - Missing content
  - Difficulty searching/locating content
  - Unclear or inaccurate topics
  - Requests for more in-depth content (calculations, formulas, real-world examples)
  - Requests for PDFs (misperception that PDFs contain more/better information)

# Current StrataJazz Help Center



The screenshot shows the StrataJazz Help Center homepage. At the top, there is a navigation bar with the Strata logo and links for 'What's New', 'Analytics', 'Decision Support', 'Planning', 'Performance', and 'General'. Below the navigation bar is a teal header with the text 'What can we help you find?' and a search bar. The main content area is titled 'Browse by Solution' and contains five categories: 'Analytics', 'Decision Support', 'Planning', 'Performance', and 'General', each with a list of sub-links. Below this is a teal section titled 'Additional Resources' with three categories: 'Trending Pages', 'Technical Help', and 'More Information', each with a list of sub-links. At the bottom, there are social media links for 'FOLLOW US' (Facebook, LinkedIn, YouTube, and a plus sign for more), the Strata logo, and a 'Contact Us' link.

## What can we help you find?

Search

### Browse by Solution

Analytics	Decision Support	Planning	Performance	General
Integrated Analytics & Reporting	Contract Analytics	Capital Management	Continuous Improvement	Data Center
Standard Reporting	Cost Accounting	Equipment Replacement	Management Reporting	Security Center
StrataSphere Compare	Episode Analytics	Operating Budgeting	Productivity Reporting	Support Center
	Strategic Pricing	Strategic Planning	RealTime	System Center

### Additional Resources

Trending Pages	Technical Help	More Information
A monthly summary of the five most popular pages in Help Center: <a href="#">What's New</a>	Links to topics that help you configure your workstation and your StrataJazz® environment: <a href="#">Technical Requirements Overview</a>	Links to topics that provide helpful information, answer common questions, and aid with troubleshooting: <a href="#">Ad Hoc Reporting Tips</a>
<a href="#">Viewing All Variances</a>	<a href="#">Single Sign-On (SSO) Integration</a>	<a href="#">Dashboard Recommendations</a>
<a href="#">Analytics</a>	<a href="#">User Provisioning and Maintenance for Single Sign-On (SSO)</a>	<a href="#">Group Management Recommendations</a>
<a href="#">Using the Home Page</a>	<a href="#">LDAP Integration</a>	<a href="#">User Management Recommendations</a>
<a href="#">Adding or Editing an Ad Hoc Report</a>	<a href="#">User Provisioning and Maintenance for LDAP</a>	<a href="#">Workflow Tips</a>

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# Align StrataJazz and Axiom deliverables

## Current StrataJazz Help Center

- Text-heavy UI
- No specific link for “Release notes”
- Non-obvious top navigation
- Nonintuitive labels
- Redundant links
- Lengthy topics with dropdowns that require scrolling
- Content describes UI and common Windows functionality
- Different navigation and user experience than Axiom



## StrataJazz Help Center refresh

- Uncluttered UI
- Updated branding
- Easy-to-navigate left navigation
- Intuitive labels
- Quick access to latest release notes
- Links to Training and Support resources
- Shorter topics with links to related tasks
- Focus shifts to feature purpose, user benefits, real-world examples
- Common user experience between StrataJazz and Axiom

# Updated StrataJazz Help Center

- One-click access to latest release notes
- Left navigation for easy access to topics
- Prominent location for announcements
- Quick-access icons to Training, Support, and Axiom Help content
- Consistent experience for users transitioning from Axiom

The screenshot displays the StrataJazz Help Center homepage with the following features:

- Left navigation bar:** Home, RELEASE NOTES (WHAT'S NEW), SOLUTIONS, SETUP & ADMIN, USER RESOURCES, TECHNICAL RESOURCES, and MORE INFORMATION.
- Header:** StrataJazz Help Center.
- Quick-access icons:** Release notes (What's new), Release notes library, and Feedback.
- Search bar:** A search bar with a magnifying glass icon.
- Browse by solution:** Buttons for Analytics, Decision Support, Planning, and Performance.
- Announcements:** Text about monthly updates and a note about the coming October refresh.
- Additional resources:**
  - Strata Academy:** Described as the single learning portal for all Strata customers. It includes links for searching courses, enrolling in learning paths, and registering for certifications.
  - Important Strata Academy links:** Login page, Welcome video, and Accessing Strata Academy video.
  - Contact information:** strataacademy@stratadecision.com.
  - Strata Support Center:** Described as an all-in-one source for self-service product information and resources. It includes links for searching help, accessing the knowledge base, and creating support cases.
  - Axiom Help Center:** Described as a resource for accessing online help and release notes for all Axiom products.
- Footer:** Copyright © 2025 Strata Decision Technology. All rights reserved. Updated: 9/26/2025. Strata logo.

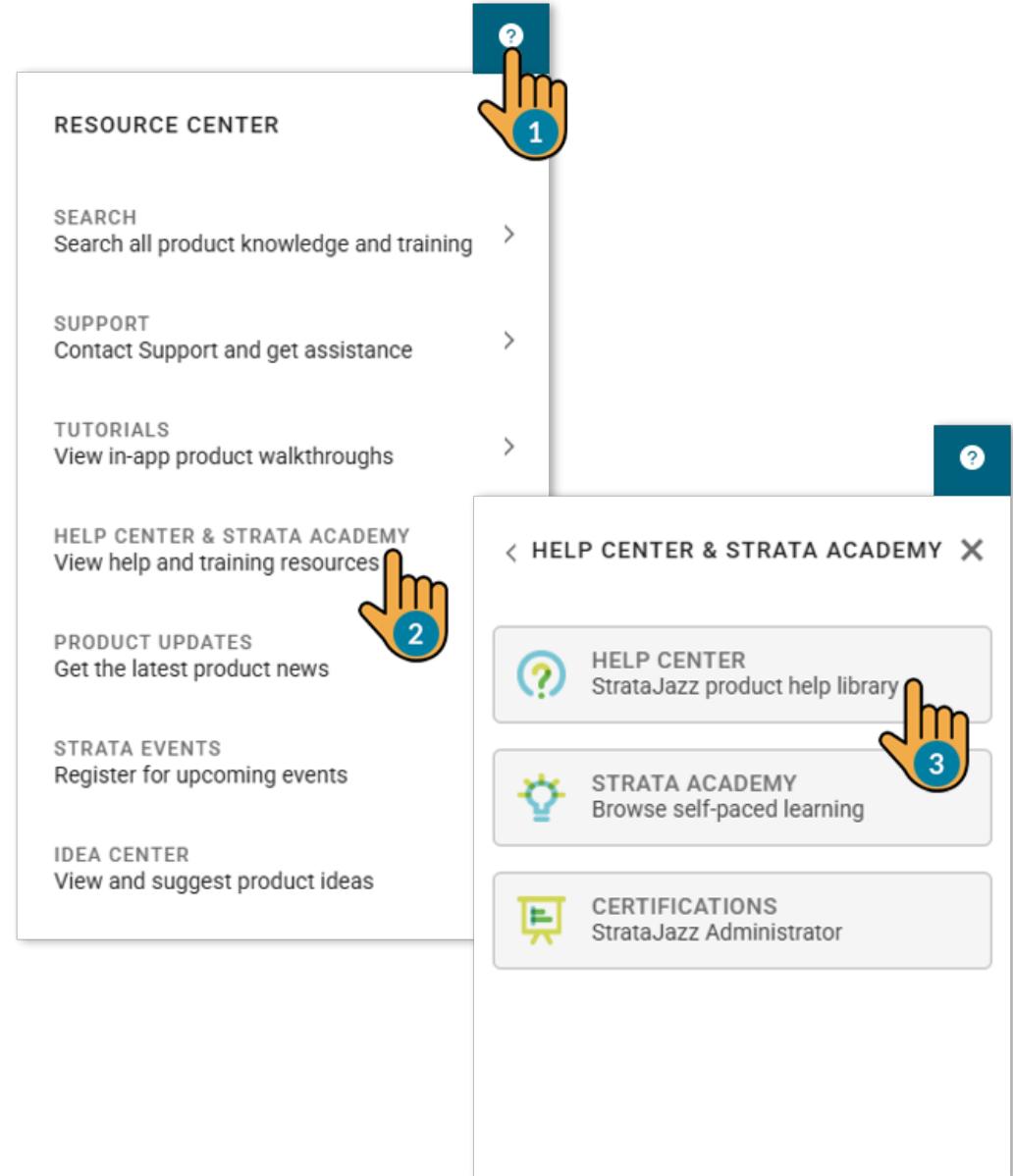
# Access the StrataJazz Help Center

1. From anywhere within StrataJazz, click the **Help** icon.
2. Under Resource Center, click **Help Center & Strata Academy > Help Center**.

And...**GOOD NEWS!**

You can still use your current [Help Center](#) bookmarks.

The Help Center URL remains the same.



# Help content issues and ongoing improvements

## Help content issues

- Lengthy topics, excessive scrolling
- Perceived lack of details in Help
- Misperception of different or better-organized content in PDFs than in Help
- Unsuccessful/inaccurate topic searches



## Help content improvements

- Shorter, more consumable topics
- New release notes format
- Links to tasks and subtopics in left navigation and in-app Help
- Feedback prompt on every topic
- Improvement in search results

# Current StrataJazz release notes

- Requires scrolling, expanding dropdowns to access solutions
- Left nav displays infrequently used links to previous years' release notes

The image shows two side-by-side screenshots of the StrataJazz release notes page. The left screenshot is from 2025, and the right one is from 2020. Both screenshots have a header with the Strata logo and navigation links: What's New, Analytics, Decision Support, Planning, Performance, and General. A search bar is at the top.

**Left Screenshot (2025):**

- Left Nav:** What's New, StrataJazz 2025 Release Notes, StrataJazz 2024 Release Notes, StrataJazz 2023 Release Notes, StrataJazz 2022 Release Notes, StrataJazz 2021 Release Notes, StrataJazz 2020 Release Notes, StrataJazz 2019 Release Notes, StrataJazz 2018 Release Notes, Analytics, Decision Support, Planning, Performance, General.
- Content:** What's New, September 2025, Analytics, Decision Support, Planning, 2025 Release Notes History (August 2025, July 2025, June 2025, May 2025, April 2025).

**Right Screenshot (2020):**

- Left Nav:** What's New, StrataJazz 2025 Release Notes, StrataJazz 2024 Release Notes, StrataJazz 2023 Release Notes, StrataJazz 2022 Release Notes, StrataJazz 2021 Release Notes, StrataJazz 2020 Release Notes, StrataJazz 2019 Release Notes, StrataJazz 2018 Release Notes, Analytics, Decision Support, Planning, Performance, General.
- Content:** What's New, September 2025, Analytics, Workbook and extract history, Relative date filters, Calculation builder, Reorder filters, View favorite reports, Decision Support.

# New StrataJazz release notes

- Modeled after Axiom change log
- One-click access to latest release notes; direct links to solutions

**StrataJazz release notes September 2025**

**Analytics**

The Integrated Analytics & Reporting and StrataSphere Compare modules were updated.

**Integrated Analytics & Reporting**

IAR now tracks the change history for workbooks, worksheets, and extracts. Moving forward, you can view a log of the following actions and the changes that were made:

- Workbooks—New workbook added or deleted, properties updates, security updates.
- Worksheets—New visualization added or deleted, schedule changes.

**Planning**

**Short Term Plan**

**FP Account rollup attributes**

The following attributes are now available in System Center and the Dimension Manager:

- FP OB Dollars Financial Reporting ID
- FP OB Dollars Financial Reporting
- FP OB Dollars Financial Reporting Category
- FP OB Dollars Financial Reporting Line Name
- FP OB Dollars Financial Reporting Sort Order

These new attributes isolate key hierarchy elements from mid-cycle changes, which improve budget stability. This update also prevents rollup-related inconsistencies and reduces the need for manual intervention during planning. You can use these attributes for reporting, but you cannot edit them during an active budgeting cycle.

**Initial Plan Method (IPM) Staffing sampling**

The resampling task for IPM staffing now deletes only unnecessary fact table data, such as data that does not exist in the corresponding INT tables. Previously, the resampling task deleted all fact table data. Deleting only unnecessary data reduces the task processing time.

**Staffing IPM log export queries**

We optimized the IPM staffing log query to reduce processing times. Some optimizations include adding processing timeouts and adjusting SQL statements to improve the query.

**Plan Editor adjustment data type**

We increased the Plan Editor set adjustment size in Benefits and General Ledger to account for cases in which adjustment values exceed 2 billion.

**Plan submission**

The system now submits only dollars and hours metrics to import tables when users submit their plans. Submitting these metrics ensures the plan can reconcile the Short Term Plan, Management Reporting (MR) and Productivity Reporting (PR) solutions. Previously, the system submitted FTEs, Wage Rates, and Hours per UOS to the import tables, which MR and PR do not utilize.

**Entity Group configuration refreshes**

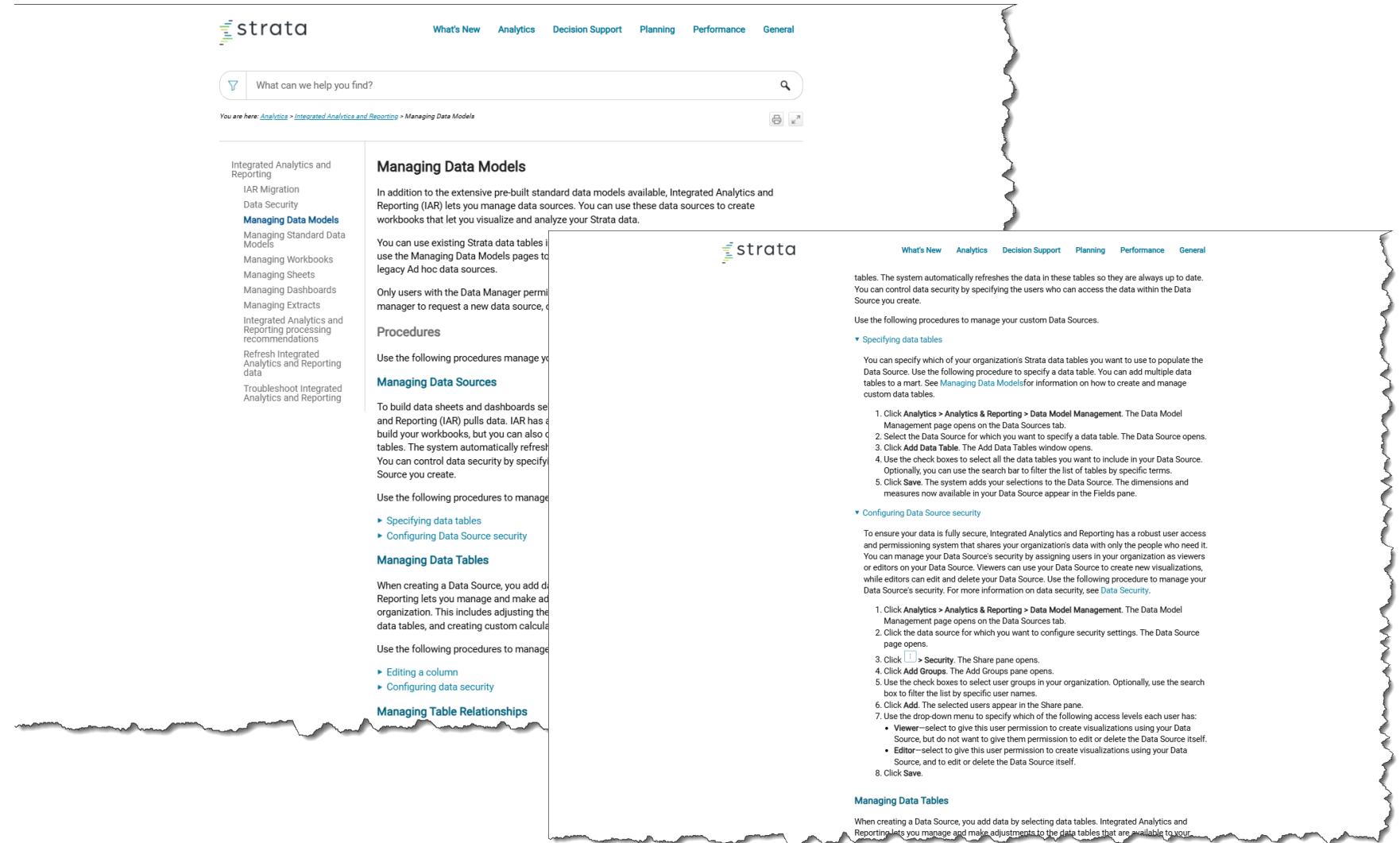
The system now automatically hides or reveals encounters and charges within the Select Data to Refresh window. The system reveals or hides encounters and charges depending on whether at least one entity group configuration has a corresponding statistics model.

**Issues fixed**

Content Area	Improvement
Itemized adjustments	<b>Issue:</b> Custom spreads inflated the total value when months increased or decreased in succession. <b>Resolution:</b> Custom spreads now spread adjustment values across months in an itemized adjustment as indicated in the UI.
UnitType buttons	<b>Issue:</b> Viewable UnitType buttons did not correspond to the page's permission settings in some scenarios. <b>Resolution:</b> The My Budgets Staffing page now displays UnitType buttons on the Fixed and Variable tabs according to your organization's permission configuration.
Flex methods	<b>Issue:</b> The system incorrectly excluded the dropdown menu from Benefits, deductions, rev, staffing, and non-staffing exports. <b>Resolution:</b> The system now includes the flex method dropdown menu in all flex method exports.
Adjusted dependent stats	<b>Issue:</b> The system zeroed-out the dependent statistic values when users imported adjusted budget values. <b>Resolution:</b> The system now imports adjustments into Plan Editor as expected.
Fixed and variable accounts	<b>Issue:</b> The system sampled some variable accounts as fixed and zeroed-out departments' projected variable dollars. <b>Resolution:</b> The system now projects accounts as expected.

# Current StrataJazz Help topic strategy

- *Extremely* long topics require extensive scrolling
- Limited topics visible in left pane
- Left pane disappears when scrolling



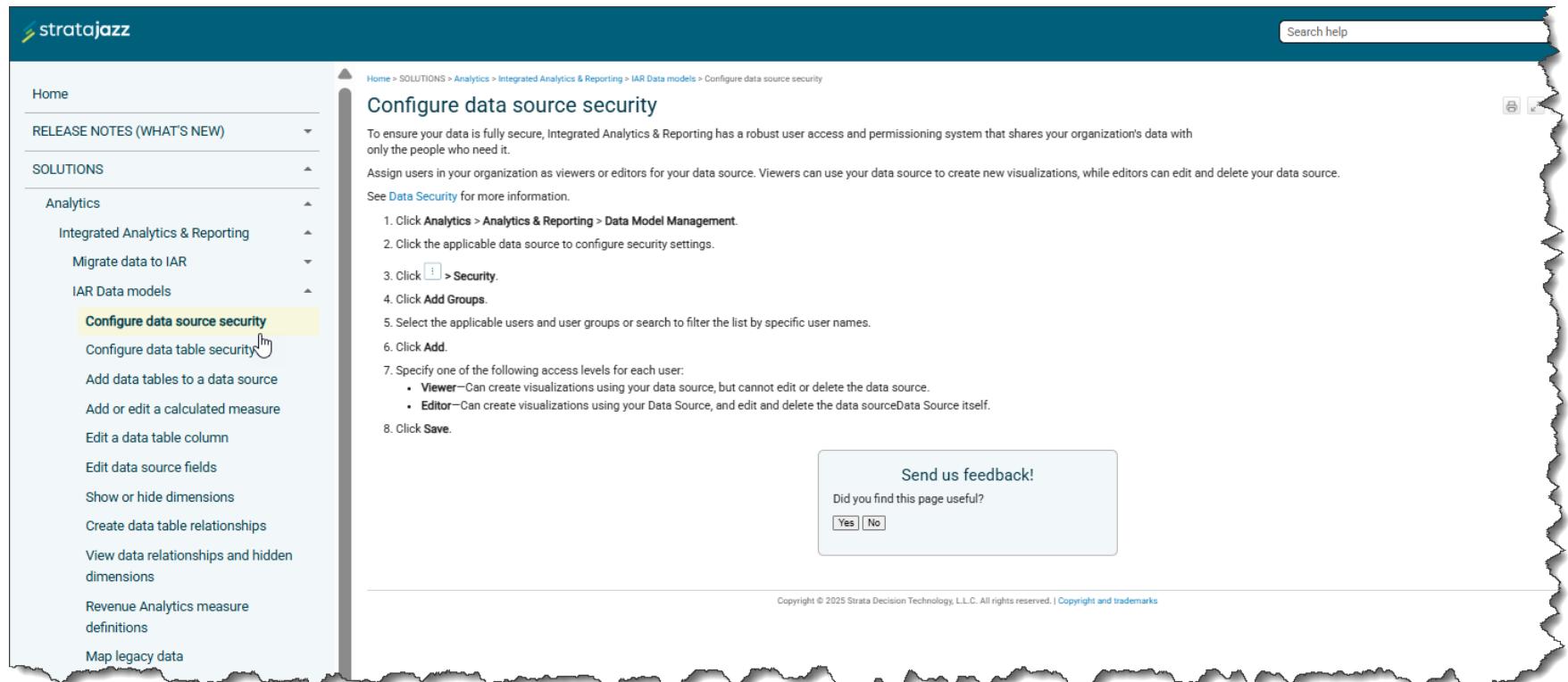
The image displays two screenshots of the StrataJazz Help system, illustrating the current topic strategy. Both screenshots show a top navigation bar with links: 'What's New', 'Analytics', 'Decision Support', 'Planning', 'Performance', and 'General'. Below this is a search bar and a breadcrumb trail: 'You are here: Analytics > Integrated Analytics and Reporting > Managing Data Models'.

**Left Screenshot (Topic List):** The left pane contains a sidebar with a list of topics under 'Integrated Analytics and Reporting'. The 'Managing Data Models' topic is expanded, showing sub-sections: 'IAR Migration', 'Data Security', 'Managing Data Models', 'Managing Standard Data Models', 'Managing Workbooks', 'Managing Sheets', 'Managing Dashboards', 'Managing Extracts', 'Integrated Analytics and Reporting processing recommendations', 'Refresh Integrated Analytics and Reporting data', and 'Troubleshoot Integrated Analytics and Reporting'. The main content area is titled 'Managing Data Models' and describes how to manage data sources using the IAR system.

**Right Screenshot (Topic List):** The right pane shows the same sidebar and breadcrumb trail. The 'Managing Data Tables' topic is expanded, showing sub-sections: 'Specifying data tables', 'Configuring Data Source security', 'Managing Data Tables', 'Editing a column', and 'Configuring data security'. The main content area is titled 'Managing Data Tables' and describes how to manage data tables in a Data Source.

# New Help topic strategy

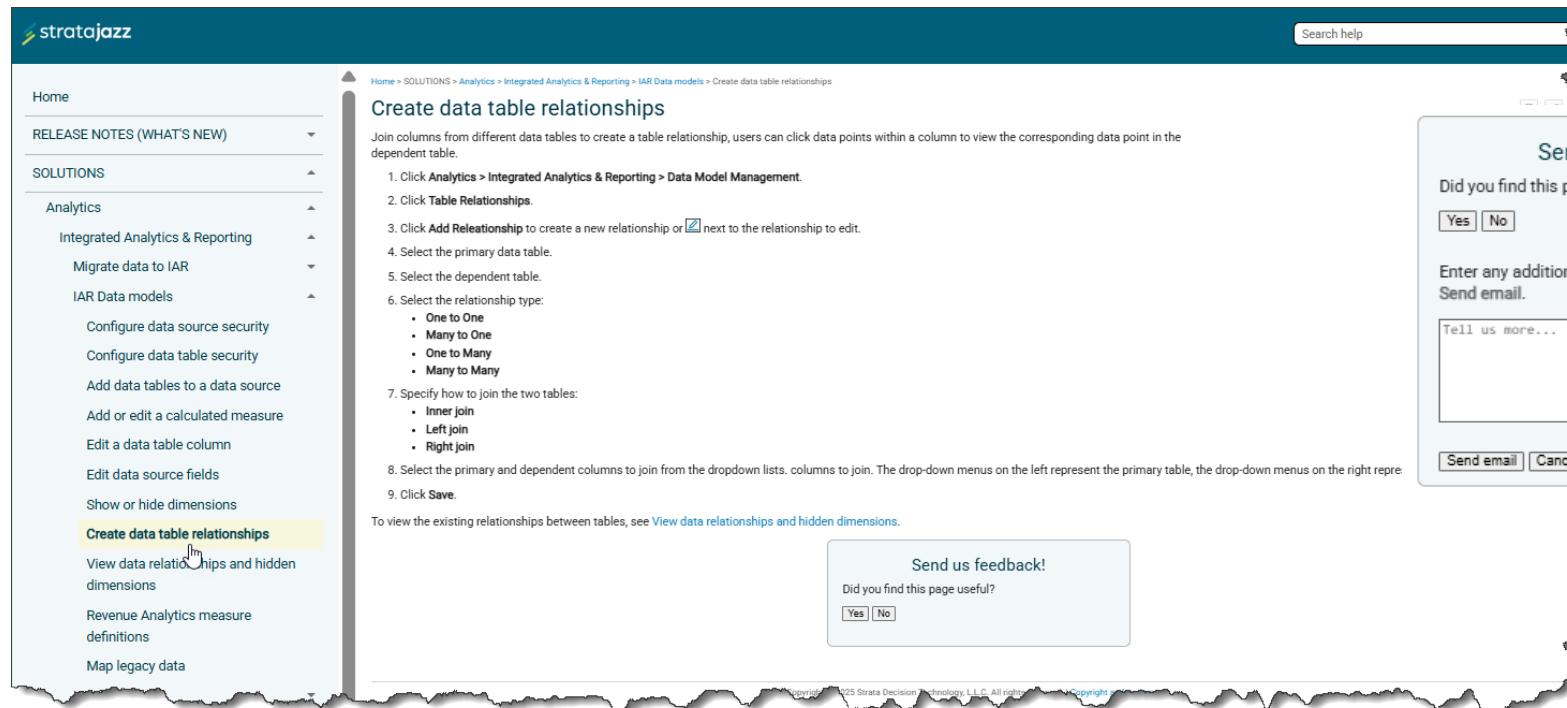
- Direct access to task-based topics
- Shorter, more consumable content



The screenshot shows a help topic for 'Configure data source security' on the stratajazz website. The left sidebar has a 'RELEASE NOTES (WHAT'S NEW)' dropdown, a 'SOLUTIONS' dropdown, and an 'Analytics' dropdown. Under 'Analytics', the 'Integrated Analytics & Reporting' section is expanded, showing 'Migrate data to IAR', 'IAR Data models', and 'Configure data source security'. The 'Configure data source security' link is highlighted with a yellow box. The main content area shows the title 'Configure data source security' and a brief description of the security system. Below this is a numbered list of 8 steps to configure security. At the bottom right of the content area is a 'Send us feedback!' box with a 'Yes' and 'No' button. The footer of the page includes a copyright notice for Strata Decision Technology, L.L.C. and links for 'Copyright and trademarks'.

# Feedback prompt (topic)

- Appears at the end of every StrataJazz and Axiom Help topic (now live in Axiom)
- Prompts users for positive or negative feedback
- Generates email to team with category and specific Help topic URL



Send us feedback!

Did you find this page useful?

Enter any additional comments below and click Send email.

Send us feedback!

Did you find this page useful?

Your input helps us improve our online help.

Information is inaccurate  
 Information is incomplete  
 Information is unclear  
 Need more assistance  
 Other

Additional comments (optional):

# New Axiom Help Center

- Single portal to all Axiom Help deliverables
- Consistent user experience and navigation between StrataJazz and Axiom platforms
- Direct access to StrataJazz Help Center

Axiom Help Center

Change log library

Help library

Feedback

Browse by industry

Healthcare

Higher Education

Financial Institutions

Market Insights

Platform

Announcements

Welcome to the new Axiom Help Center! Bookmark the [Help Center URL](#) for quick access to online Help documentation for all Axiom products.

Additional resources

Strata Academy

Strata Academy is the single learning portal for all Strata customers. You can quickly onboard, learn about your product's features, and get the most value from your Strata software.

- Search for and self-enroll in courses and learning paths that match your job role, products, and interests.
- Register for instructor-led certifications directly from the Strata Academy dashboard.

Important Strata Academy links:

- [Login page](#)
- [Welcome \(video\)](#)
- [Accessing Strata Academy \(video\)](#)

Contact the Strata Academy team for assistance: [strataacademy@stratadecision.com](mailto:strataacademy@stratadecision.com).

Strata Support Center

Strata Support Center is your all-in-one source for self-service product information and resources. You can:

- Search Help and other resources for all Axiom products and versions.
- Access the Knowledge Base.
- Create and manage your Support cases.

stratajazz StrataJazz Help Center is your resource for accessing StrataJazz online help and release notes.

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# Next steps

- **Communication plan**
  - Short video tour of refreshed StrataJazz Help Center, new release notes format, and feedback prompts
  - Direct meetings with Strata and Axiom Support and Services teams
  - Possible Pendo announcement
- **Ongoing improvements to StrataJazz and Axiom documentation**
  - Emphasis on business purpose and benefits for new features and enhancements
  - Continued alignment of StrataJazz and Axiom styles and writing strategies
  - Scheduled “Uplift Days” dedicated to cleaning up errors, broken links, and inconsistencies
- **Partnership with User Research team**
  - Develop documentation surveys for StrataJazz and Axiom
  - Interview customers

# QUESTIONS

