



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

Early perceptions

Document audiences used to:

- Read every word in online help topics.
- Require screen captures to confirm navigation or actions.
- Read all related topics sequentially.
- Need instructions for common Windows functionality and UI elements.

Current realities

Today's software users:

- Read fewer words.
- Scan topics for bolded queues.
- Search for or quickly browse for keywords.
- Expect immediate answers to questions.
- Turn to documentation as a last resort.

Evolution

Documentation should provide:

- Quicker, more accurate searches.
- Consumable content chunks.
- Scannable content.
- Intuitive navigation.
- Prevention and quick recovery from user errors.

Address ongoing feedback

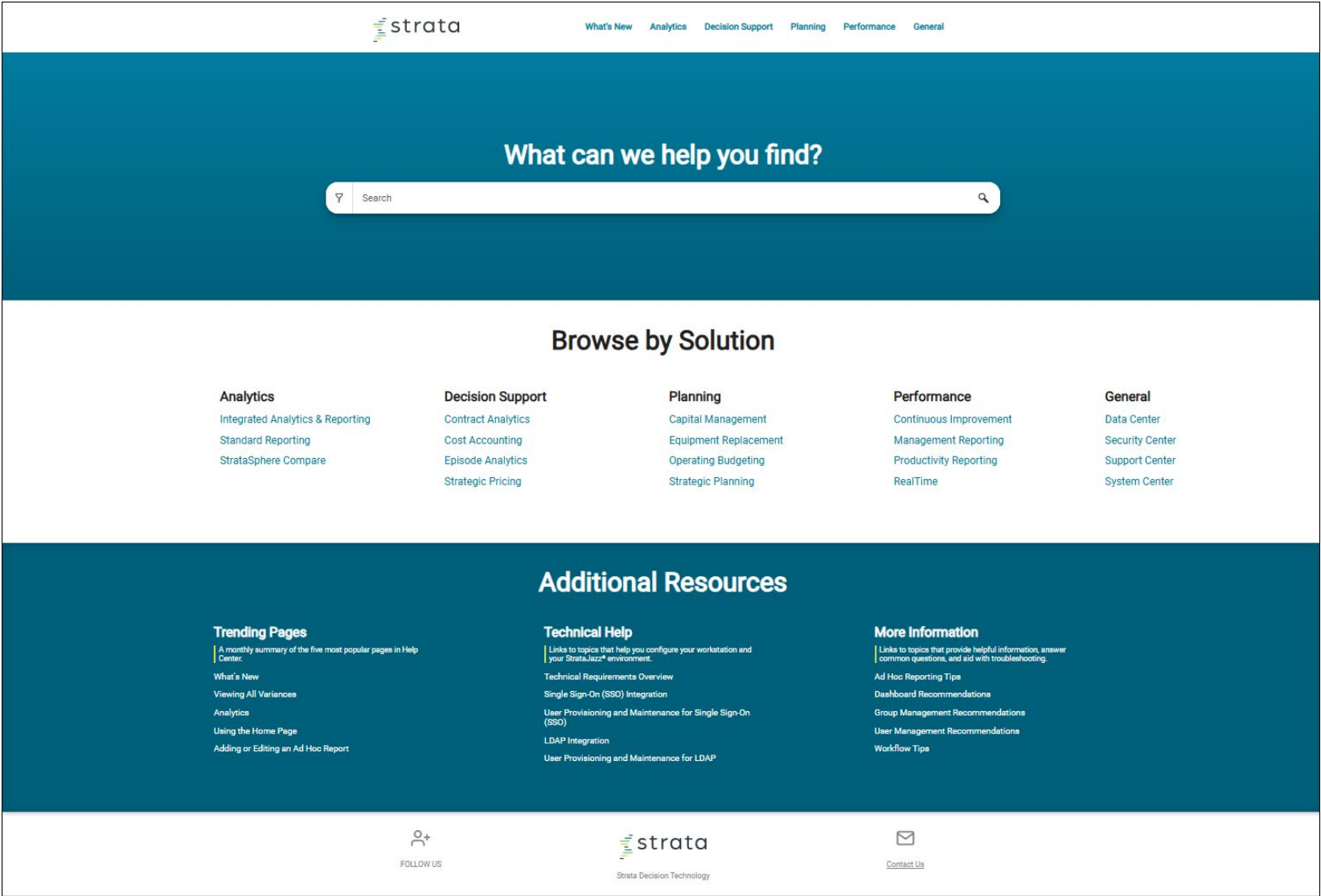
- Feedback sources

- 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- Typos, broken links, outdated screenshots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



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

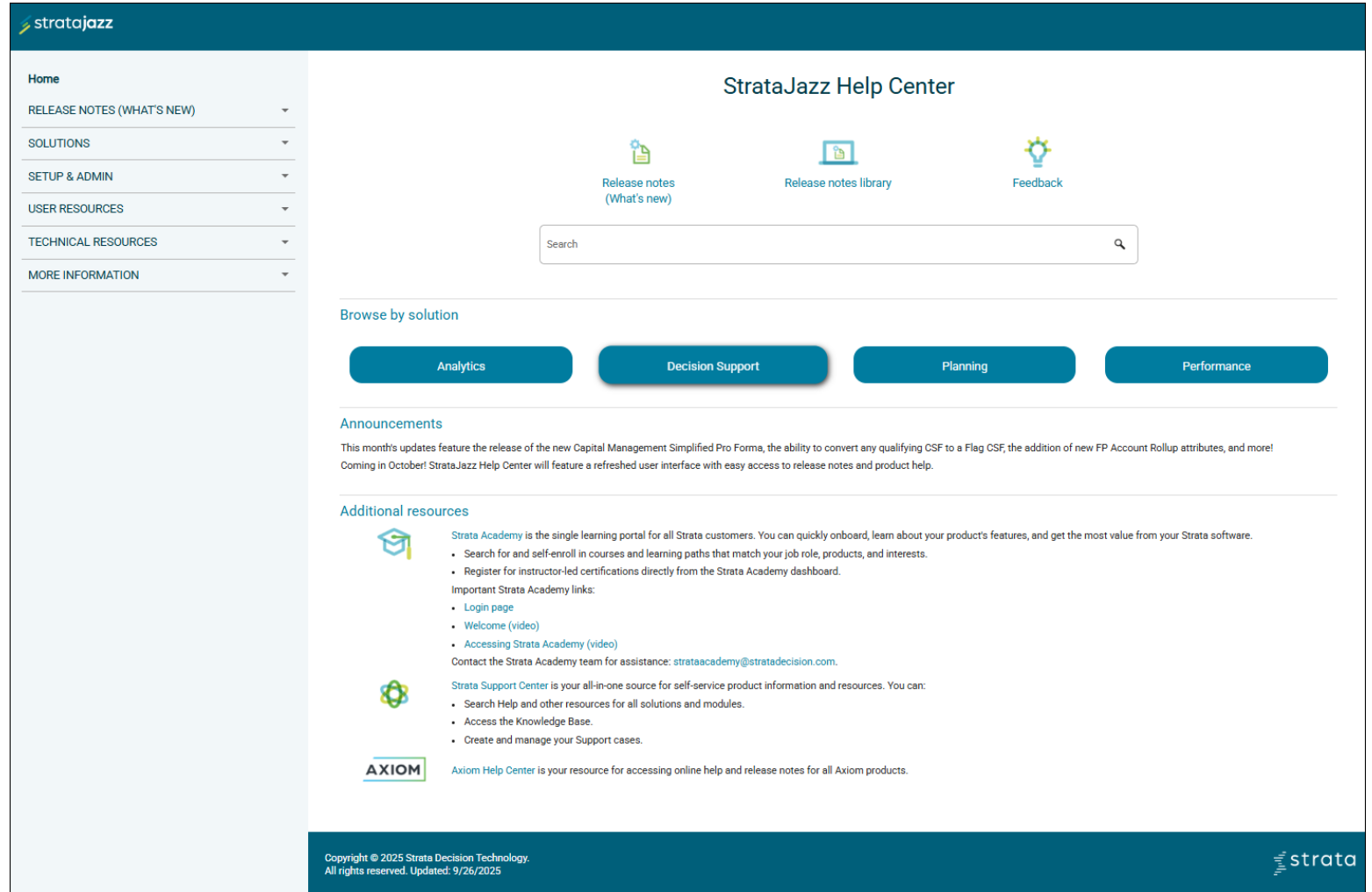


StrataJazz Help Center refresh

- 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



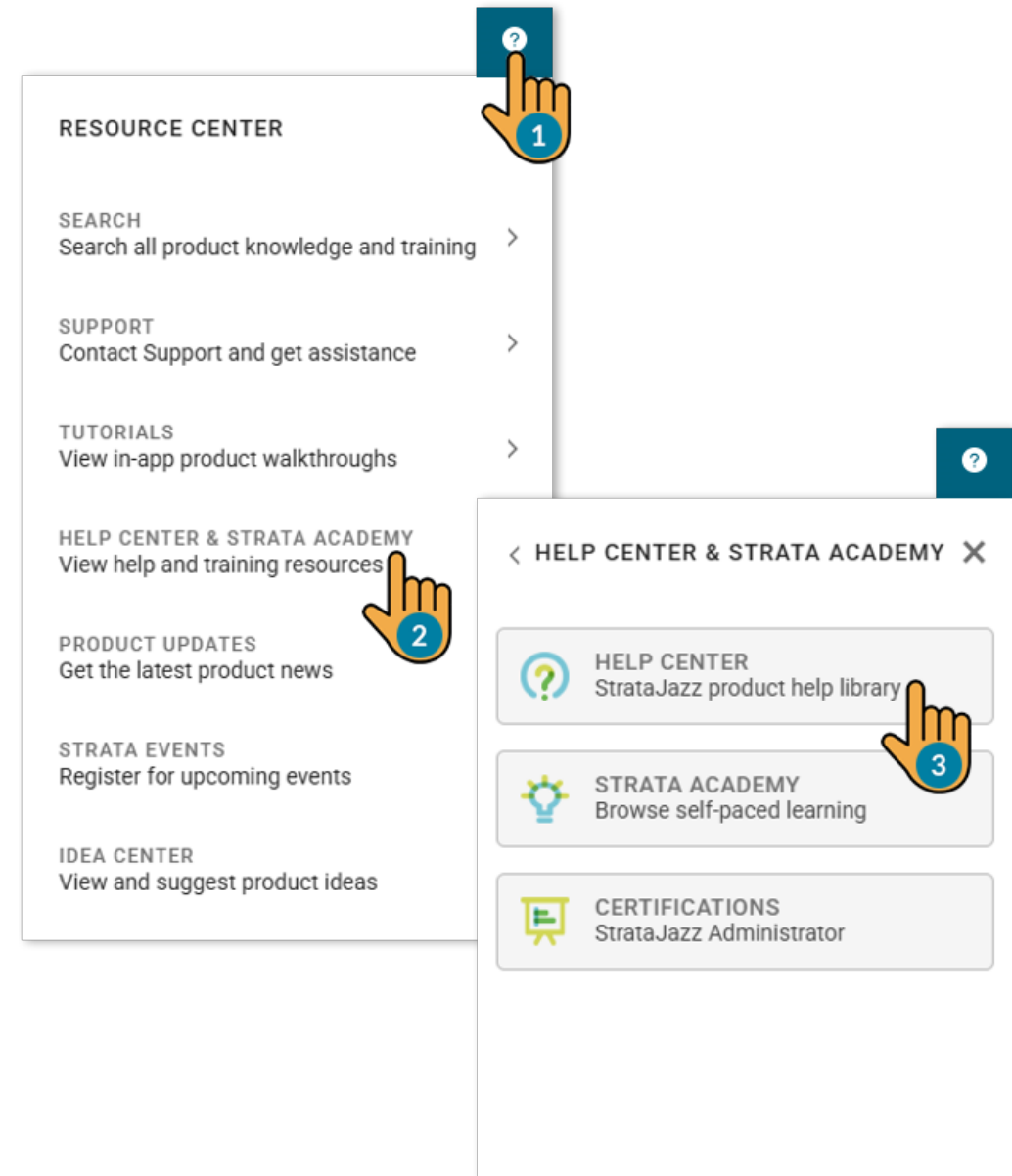
Access the StrataJazz Help Center

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

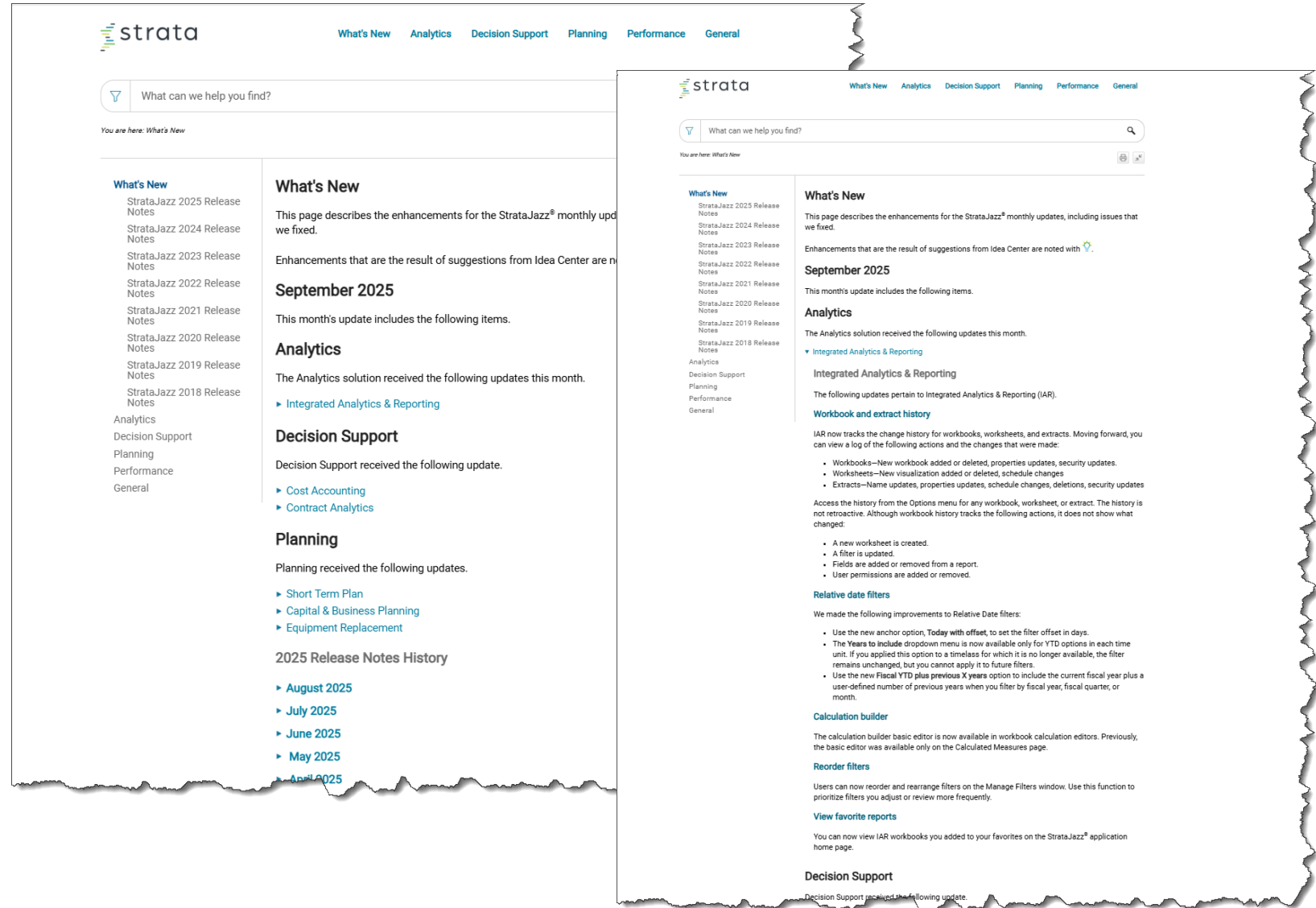


Help content improvements

- 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



New StrataJazz release notes

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

The image displays two screenshots of the StrataJazz release notes page for September 2025. The top screenshot shows the 'Analytics' section, and the bottom screenshot shows the 'Planning' section.

StrataJazz release notes September 2025

Analytics

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

Integrated Analytics & Reporting

Workbook and extract history

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.

On this page

- Analytics
- Decision Support
- Planning

StrataJazz release notes September 2025

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

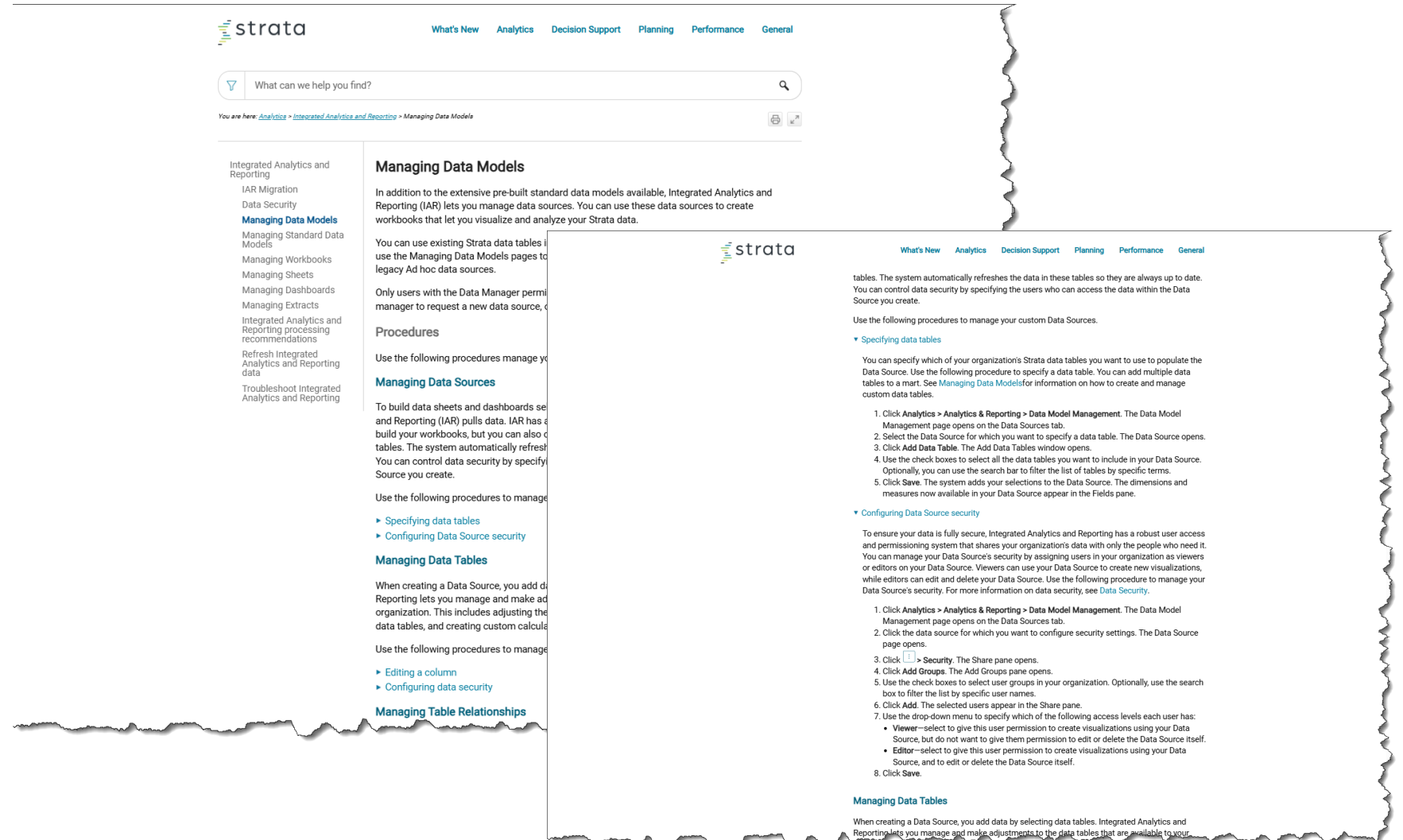
The system now automatically hides or reveals encounters and charges within the Select Data to Refresh window. The system reveals or hides encounters and charges depending on whether at least one entity group configuration has a corresponding statistics model.

Issues fixed

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

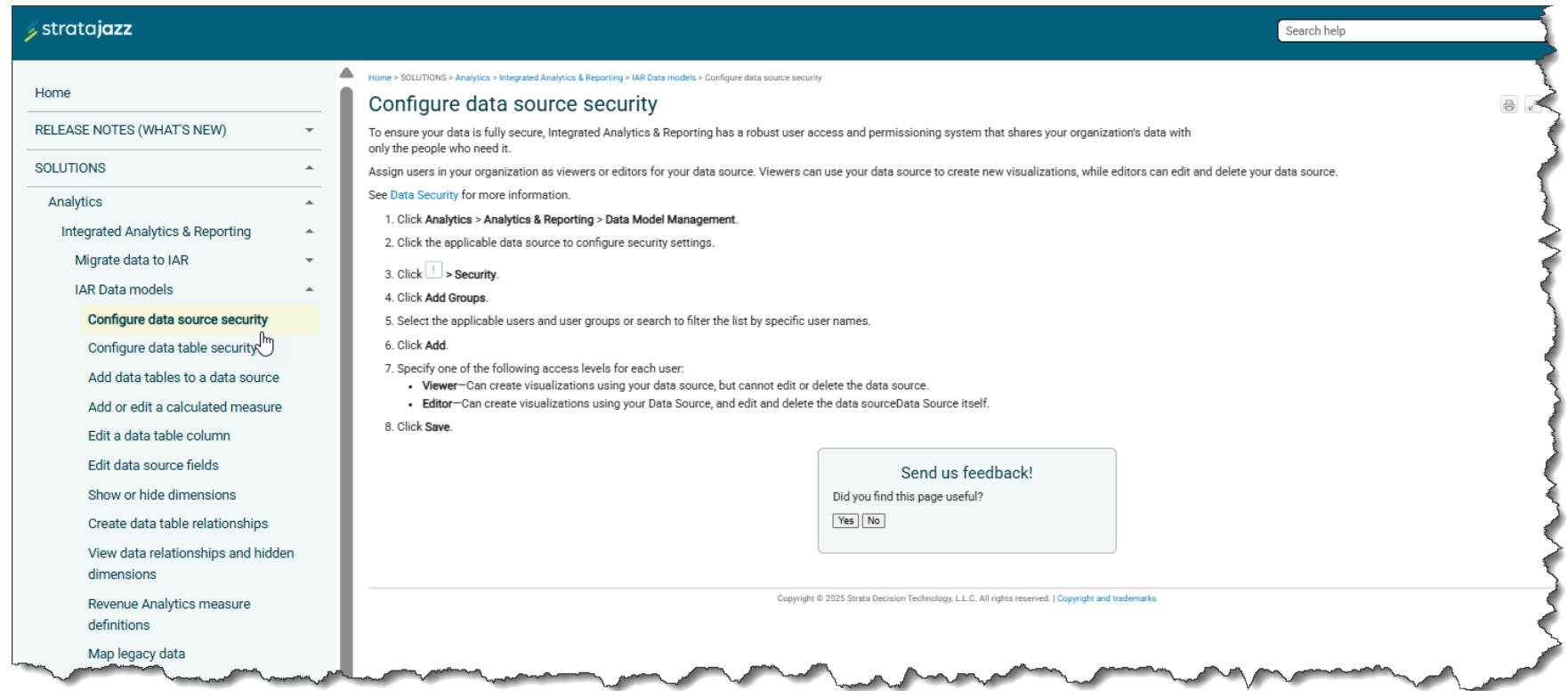
Current StrataJazz Help topic strategy

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



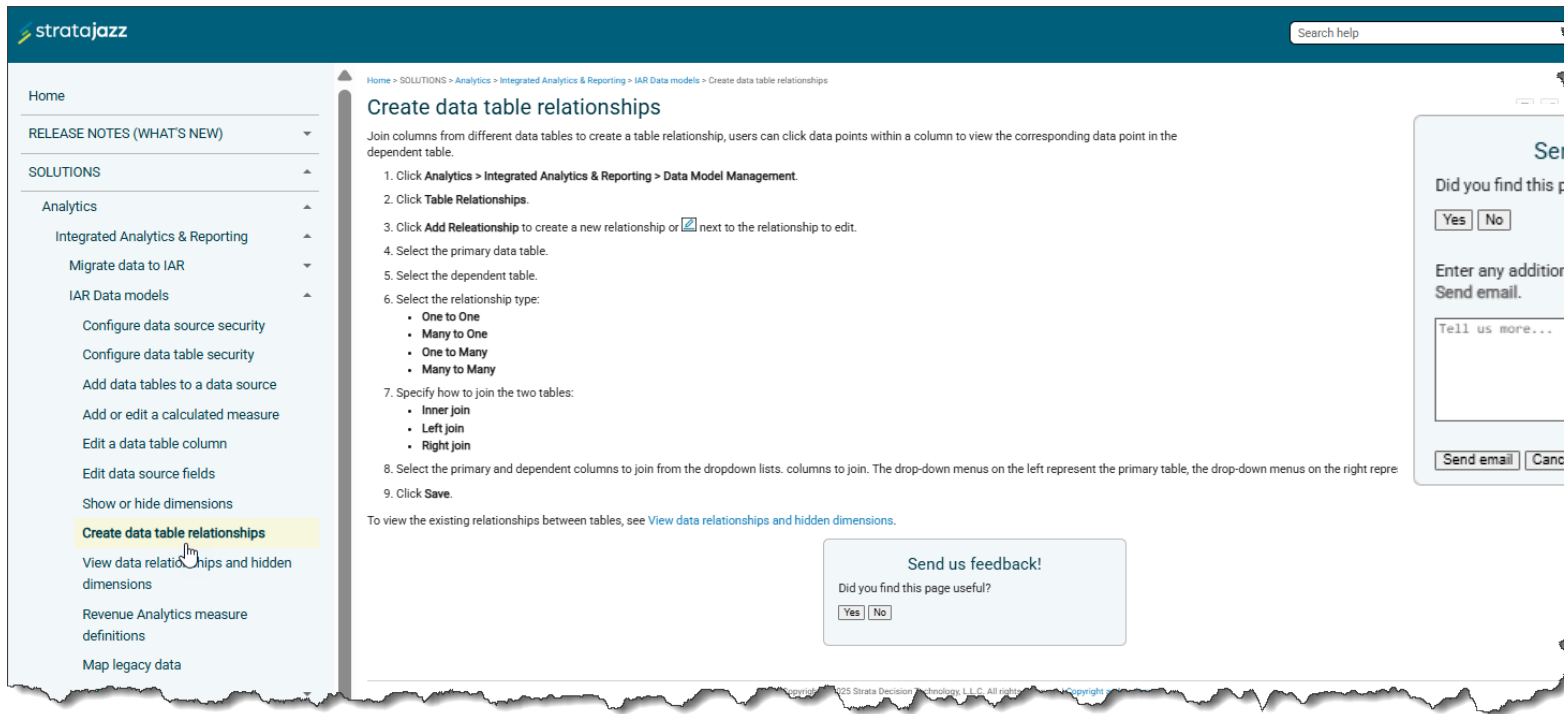
New Help topic strategy

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



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?

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

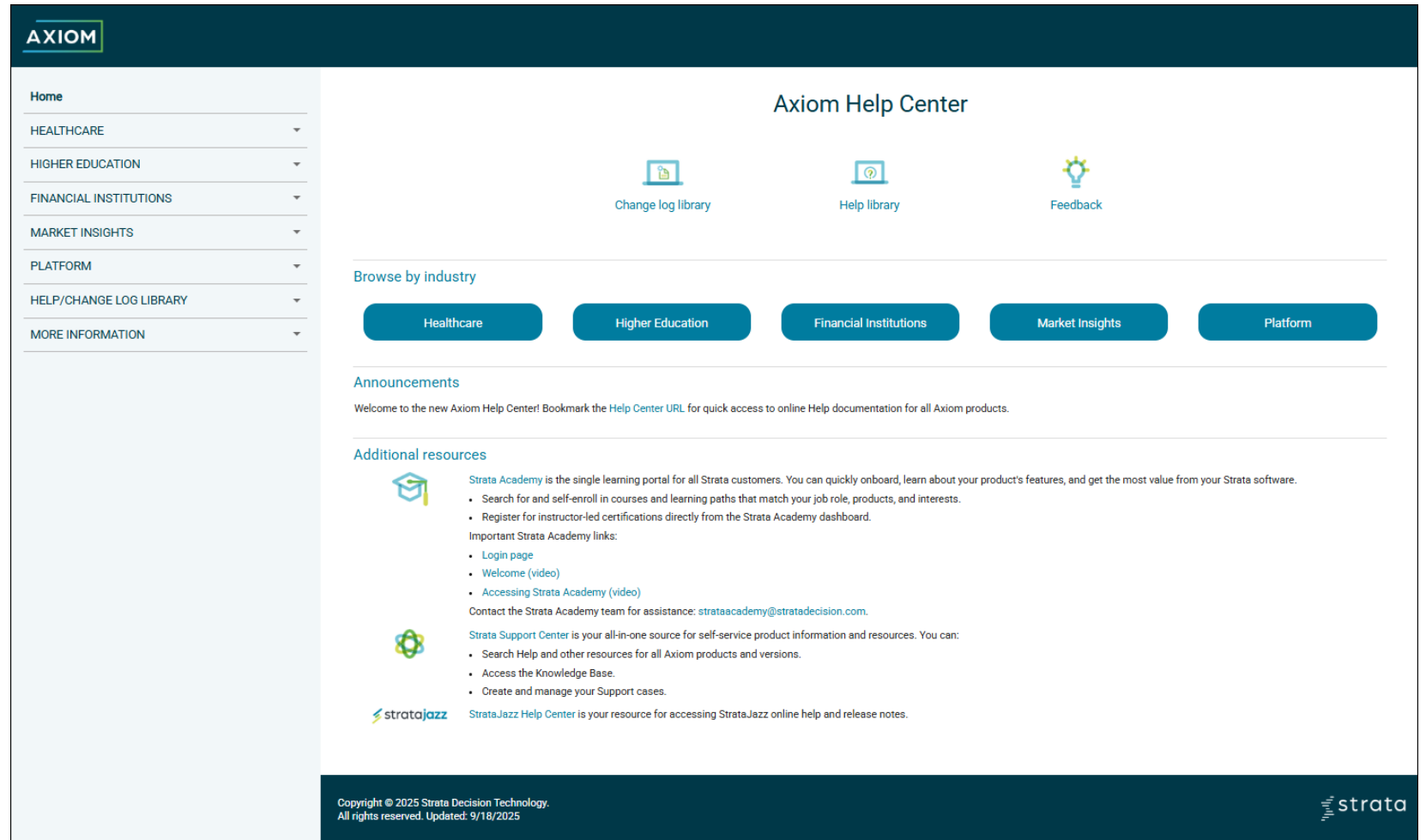
☐ Need more assistance

☐ 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



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

