



# Year End Roll Forward Process

(Based upon Version 2019.4)

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May 20, 2020

# AGENDA

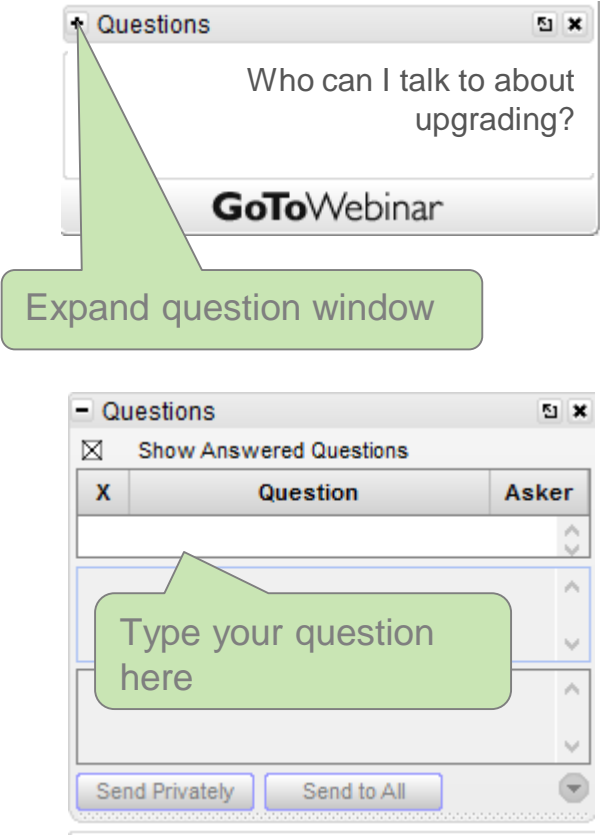
- Introductions & Webinar instructions
- Year End Roll Forward Process
- Using the Client Log file for troubleshooting
- Diagnosing Connectivity Issues
- Questions and Answers

# WEBINAR INFORMATION

## Maximize your viewing window



## Submit questions



# ADDITIONAL RESOURCES



## ***Axiom Academy:***

- New!! Certification in System Administration
- **Axiom Academy Labs**
  - **Healthcare Budget Reports & Dashboards** on 5/27
  - **Axiom Fundamentals for All Industries** on 6/10
- Email [AxiomAcademy@kaufmanhall.com](mailto:AxiomAcademy@kaufmanhall.com)

## ***COVID-19:***

- [Kaufmanhall.com/coronavirus-update](https://kaufmanhall.com/coronavirus-update)

# UPCOMING WEBINARS

KaufmanHall

**AXIOM**

[www.kaufmanhall.com/about-us/events-webinars-speaking](http://www.kaufmanhall.com/about-us/events-webinars-speaking)

## ***Healthcare:***

- **Rolling Forecasting: Stay Agile in the Face of Disruption**  
May 21, 2020 | 2:00 PM ET

## ***Higher Education:***

- **Tuition Planning for COVID-19 and Beyond: Bring Your Financial Future into Focus**  
May 28, 2020 | 2:00 PM ET

## ***Financial Institutions:***

- **Part 3: A Best Practice Approach to Profitability Management**  
May 21, 2020 | 3:00 PM ET
- **Taking a Pulse with Financial Institutions: 2020 Profitability Strategies**  
June 23, 2020 | 2:00 pm ET  
(Webinar with FMS – please email [tkvavle@kaufmanhall.com](mailto:tkvavle@kaufmanhall.com) for free attendance)

# Year End Roll Forward Process

# AGENDA

- 1 What's an annual rollover?
- 2 Why is it important?
- 3 When is a rollover performed?
- 4 Who initiates a rollover?
- 5 How to search online help for this topic
- 6 Steps in Rolling Forward process
- 7 How is the system affected



## (1) WHAT'S AN ANNUAL ROLLOVER?

- Process which **advances** the system to the **next fiscal year reporting period**.
- The reporting periods are **specific** to each application and vary within types of **data tables** used.
  - Ie...financial table v. payroll table will have a different set of periods.
- Rolling to the next fiscal year is a **specific set of functions** that differs from just **changing** the period of the current year.



## (2) WHY IS IT IMPORTANT



- Prepares the application to accept data into the **next available time period** for various tables.
- **Updates** various **period** and **calculated field** values used by our applications such as Budgeting, Performance Reporting and Rolling Forecast.
- Used as a point of **reference** in many reporting and utility assets to know what data to process.
- Used to **identify aliases** within our application.
  - Ie...alias for '**CYA**' may be associated with FY 2020

### **(3) WHEN A ROLLOVER IS PERFORMED**



- Reasons for changing the FYE can be back/forth include
  - Payroll needing to post in the new FYE (ie...2021)
  - Finance closing the books for the current year (ie...2020)
  - Budget is being finalized (ie...2021)
  - Audits of the recently closed FYE and related reports to run for stakeholders (ie...2020)



### (3) WHEN A ROLLOVER IS PERFORMED

- Commonly payroll values will need to be entered **before** financial values of the prior year are finalized.
- When to set the period to the next FY can be back/forth temporarily while the finance team closes the books.

DEPT	EMPID	JOBCODE	PAYTYPE	DLLRS1	DLLRS2	DLLRS3	DLLRS4
27200	21979	J00506	P0001	1989.96	1808.35	2036.33	1669.25

Pay	Pay Period	Fiscal
Period	End Date	Month
1	7/13/2019	1
2	7/27/2019	1
3	8/10/2019	2
4	8/24/2019	2
5	9/7/2019	3
6	9/21/2019	3
7	10/5/2019	4
8	10/19/2019	4
9	11/2/2019	4
10	11/16/2019	5
11	11/30/2019	5
12	12/14/2019	6
13	12/28/2019	6
14	1/11/2020	7
15	1/25/2020	7
16	2/8/2020	8
17	2/22/2020	8
18	3/7/2020	9
19	3/21/2020	9
20	4/4/2020	10
21	4/18/2020	10
22	5/2/2020	11
23	5/16/2020	11
24	5/30/2020	11
25	6/13/2020	12
26	6/27/2020	12



## (4) WHO INITIATES A ROLLOVER

- Typically we want the **Master System User (MSU)** to perform the rollover.
- The MSU will typically be **responsible for the timing, notification and coordination** of when the task should be initiated.
- The task may be **delegated** to another as the MSU designates.

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### ANNOUNCEMENTS

- EPM is set to Pd 07
- Provider payroll for period 7 is loaded (2/1/17)
- Employee Bi-weekly Payroll 16 has been loaded(2/9/17)
- Prod Workload Volumes for Payroll 16 are loaded(2/9/17)
- Pay27 to Pay12 (CDs and WDs) utilities ran (2/1/17)
- Monthly to GL utilities ran (2/1/17)
- Monthly stats period 6 are loaded as of 1/9/17
- P/S Staffing for Payroll 15 is loaded(1/26/17)

# HOW TO SEARCH ONLINE HELP FOR THIS TOPIC

## Search Help

Enter a key word search to browse a listing of suggested topics.

AXIOM

rolling forward

What's new

Getting Started

BUDGET SETUP

Budget setup checklist

Setting up data tables

Your search for "rolling forward" returned 6 result(s).

Rolling Forward to a New Budget Year

Upgrade Axiom to the most current release, and then follow these steps. Also make sure you're not in an active budget cycle. As part of the implementation process, a Kaufman Hall Implementation Consultant helps you create a budget file group for the current year, as discussed the section Setting ...

Didn't find what you are looking for?  
Review these [search tips](#).

## PROCESS STEPS IN HELP

1. Archive the budget plan files (Optional)
2. Roll data over to next year's file group.
3. Update suite variables
4. Update process definitions
5. Prepare for the next fiscal year
6. Review other system areas



# 1 – ARCHIVE THE BUDGET PLAN FILES

- The Archive Current Year Plan Files command allows you to convert the current plan files in a file group to static snapshots of the files, for viewing only.
- This command is intended to be used in cases where planning is finished for the file group, but you still want the ability to view the finalized plan files.
- However, you do not want the plan files to be updated with new data or save data to the database.

## 2 – ROLL DATA OVER TO NEXT YEAR'S FILE GROUP

BUDGET  
PROCESS  
RELATED

The Rollover File Group utility copies all data from the current file group to next year's file group. This includes the driver and security setting data.

### NOTE:

This is normally done prior to the start of your next budget cycle.

We do NOT recommend doing this at the start of your new fiscal year.



## 3 – UPDATE SUITE VARIABLES

BUDGET  
PROCESS  
RELATED

### NOTE:

This is normally done prior to the start of your next budget cycle after creating your new file group.

We do NOT recommend doing this at the start of your new fiscal year.

## 4 – UPDATE PROCESS DEFINITIONS

**BUDGET  
PROCESS  
RELATED**

### NOTE:

This is normally done prior to the start of your next budget cycle after creating your new file group.

We do NOT recommend doing this at the start of your new fiscal year.

## 5 – PREPARE FOR THE NEXT FISCAL YEAR

- A. Update system periods
- B. Update year and period tables
- C. Update payroll dates tables
- D. Update the current payroll schedule
- E. Update the Budget Configuration driver (Budget process related)
- F. Update the Budget Statistics driver (Budget process related)

# A - UPDATE SYSTEM PERIOD

ADMIN | Imports & Data Utilities | System Period & Year

System Current Period

?

×

Change the value below to update the System Current Period.

System Current Period

Current Value

12

New Value

1

System Current Year

Current Value

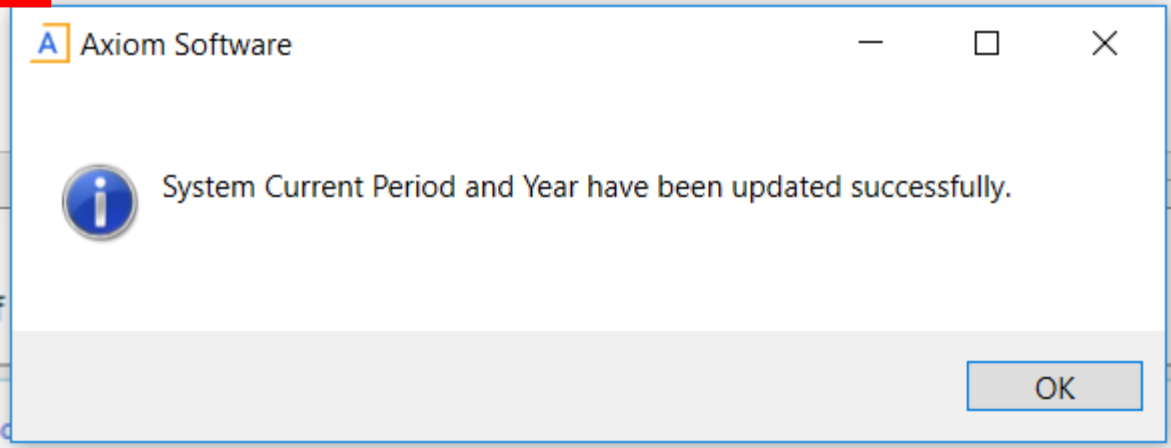
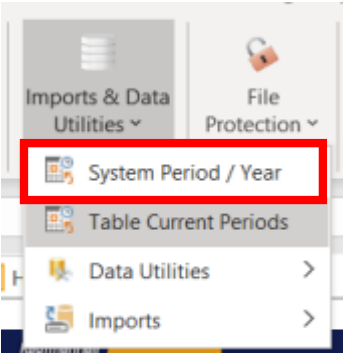
2020

New Value

2021

OK

Ca



# B – UPDATE YEAR AND PERIOD TABLES

## MANAGEMENT REPORTING ADMIN

### Documentation

#### Management Reporting

### Data Maintenance

- Change Payroll 27 Tables-Current Period
- Update VCC Payroll Mapping Table
- Update Payroll Dates Table
- Update VCC Threshold Table
- Update Year and Period Tables**

KHA Suite



### Primary Inputs

Save

Fiscal Year

2021

Fiscal Start Month

July

FTE Hours

2080

Update working days,  
as needed

### Working Days Inputs

Serial	Month	Current Year	Last Year	Next Year
		Working Days 2021	Working Days 2020	Working Days 2022
7	July	23	23	23
8	August	23	23	23
9	September	22	22	22
10	October	23	23	23
11	November	22	22	22
12	December	23	23	23
1	January	23	23	23
2	February	20	20	20
3	March	23	23	23
4	April	22	22	22
5	May	23	23	23
6	June	22	22	22

### Year Table

Year	Fiscal Year	Description
2021	FY21	Actual
2021	FY21	Budget
2021	FY21	Projected
2021	FY21	Flex Budget
2019	FY19	L2 Actual
2020	FY20	Last Year
2020	FY20	LY Budget
2022	FY22	NY Budget
2021	FY21	Forecast

### Period Table

Serial	Month	Quarter	Current Year	Last Year	Next Year	Current Year Month	Last Year Month	Next Year Month	Current Calendar Days	Last Year Calendar Days
7	July	1	2020	2019	2021	Jul-2020	Jul-2019	Jul-2021	31	31
8	August	1	2020	2019	2021	Aug-2020	Aug-2019	Aug-2021	31	31
9	September	1	2020	2019	2021	Sep-2020	Sep-2019	Sep-2021	30	30
10	October	2	2020	2019	2021	Oct-2020	Oct-2019	Oct-2021	31	31
11	November	2	2020	2019	2021	Nov-2020	Nov-2019	Nov-2021	30	30
12	December	2	2020	2019	2021	Dec-2020	Dec-2019	Dec-2021	31	31
1	January	3	2021	2020	2022	Jan-2021	Jan-2020	Jan-2022	31	31
2	February	3	2021	2020	2022	Feb-2021	Feb-2020	Feb-2022	28	29
3	March	3	2021	2020	2022	Mar-2021	Mar-2020	Mar-2022	31	31
4	April	4	2021	2020	2022	Apr-2021	Apr-2020	Apr-2022	30	30

# C – UPDATE PAYROLL DATES TABLE

ADMIN | Imports & Data Utilities | Table Current Periods

Table Current Periods

For each table in the system you can specify a table-specific Current Period, or indicate that the table should rely on the System Current Period.

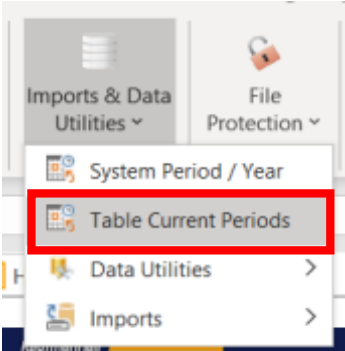
Table Name	Uses System	Current Period	Folder Path
BUD_PAY12_2021_DM1	<input checked="" type="checkbox"/>	1	\Axiom\Table Library\Budgeti
BUD_PAY12_2021_DM	<input checked="" type="checkbox"/>	1	\Axiom\Table Library\Budgeti
ACT_PAY27_2021	<input type="checkbox"/>	18	\Axiom\Table Library\Manage
BUD_PAY12_2021_Suppo	<input checked="" type="checkbox"/>	1	\Axiom\Table Library\Budgeti
BUD_PAY12_2018	<input checked="" type="checkbox"/>	1	\Axiom\Table Library\Budgeti
ACT_PAY27_2019	<input type="checkbox"/>	18	\Axiom\Table Library\Manage
BUD_PAY12_2021	<input checked="" type="checkbox"/>	1	\Axiom\Table Library\Budgeti
ACT_PAY27_2020	<input type="checkbox"/>	18	\Axiom\Table Library\Manage
BUD_PAY12_2017	<input checked="" type="checkbox"/>	1	\Axiom\Table Library\Budgeti
BUD_PAY27_2020	<input type="checkbox"/>	18	\Axiom\Table Library\Budgeti
BUD_PAY27_2021	<input type="checkbox"/>	18	\Axiom\Table Library\Budgeti
BUD_PAY27_2018	<input type="checkbox"/>	18	\Axiom\Table Library\Budgeti
BUD_PAY27_2019	<input type="checkbox"/>	18	\Axiom\Table Library\Budgeti

Update the Payroll period for each table

Apply

OK

Cancel



# D – UPDATE THE CURRENT PAYROLL SCHEDULE

KHA Suite

Payroll Dates

Cycle 1

7/4/2020

6

Pay Period End Date

<<< Select first Pay Period End Date of the year

<<< Select the number of days the Pay Date is after the Pay Period End Date

<<< Select the fiscal month driver before save (default is Pay Period End Date)

Cycle 2

7/11/2020

6

Pay Period End Date

<<< Select first Pay Period End Date of the year

<<< Select the number of days the Pay Date is after the Pay Period

<<< Select the fiscal month driver before save (default is Pay Per

Pay Period	Current Year			Last Year			Next Year		Current Year			Last Year		
	Pay Period End Date	Current Year Pay Date	Fiscal Month	Pay Period End Date	Last Year Pay Date	Pay Period End Date	Next Year Pay Date	Pay Period End Date 2	Current Year Pay Date 2	Fiscal Month 2	Pay Period End Date 2	Last Year Pay Date 2		
1	7/4/2020	7/10/2020	1	7/6/2019	7/12/2019	7/3/2021	7/9/2021	7/11/2020	7/17/2020	1	7/13/2019	7/19/2019		
2	7/18/2020	7/24/2020	1	7/20/2019	7/26/2019	7/17/2021	7/23/2021	7/25/2020	7/31/2020	1	7/27/2019	8/2/2019		
3	8/1/2020	8/7/2020	2	8/3/2019	8/9/2019	7/31/2021	8/6/2021	8/8/2020	8/14/2020	2	8/10/2019	8/16/2019		
4	8/15/2020	8/21/2020	2	8/17/2019	8/23/2019	8/14/2021	8/20/2021	8/22/2020	8/28/2020	2	8/24/2019	8/30/2019		
5	8/29/2020	9/4/2020	2	8/31/2019	9/6/2019	8/28/2021	9/3/2021	9/5/2020	9/11/2020	3	9/7/2019	9/13/2019		
6	9/12/2020	9/18/2020	3	9/14/2019	9/20/2019	9/11/2021	9/17/2021	9/19/2020	9/25/2020	3	9/21/2019	9/27/2019		

MANAGEMENT REPORTING ADMIN

Documentation

Management Reporting

Data Maintenance

Change Payroll 27 Tables-Current Period

Update VCC Payroll Mapping Table

Update Payroll Dates Table

Update VCC Threshold Table

Update Year and Period Tables

FP Payor

Benchmark

CalDate Update Utility

Names

Data Imports

Manual Data Input

Data Reconciliation

Payroll Accruals & Aggregation

Revenue & Usage Utilities

Standard Data Assessment

Hide Cycle 2

## **E – UPDATE THE BUDGET CONFIGURATION DRIVER**

## **F – UPDATE THE BUDGET STATISTICS DRIVER**

### **NOTE:**

These are normally done prior to the start of your next budget cycle after creating your new file group.

We do NOT recommend doing this at the start of your new fiscal year.



## 6 – REVIEW OTHER SYSTEM AREAS

Refer to the budget checklist and all of the topics related to it. Although the budget file group is now active, there remains a few system areas to review and possibly update.

- **Bring data current – Bring the GL and Statistic data current.**
- Verify Budget Control columns in the DEPT dimension table – Validate that the DEPT dimension key Budget columns have been reviewed and updated.
- Verify the Budget Control columns in the ACCT, JOBCODE, and PAYTYPE dimension tables
- Load updated employee master data.
- Build 1-5 sample budgets for verification.
- Adjust dimension budget settings and driver information accordingly.

### NOTE:

These are normally done prior to the start of your next budget cycle after creating your new file group.

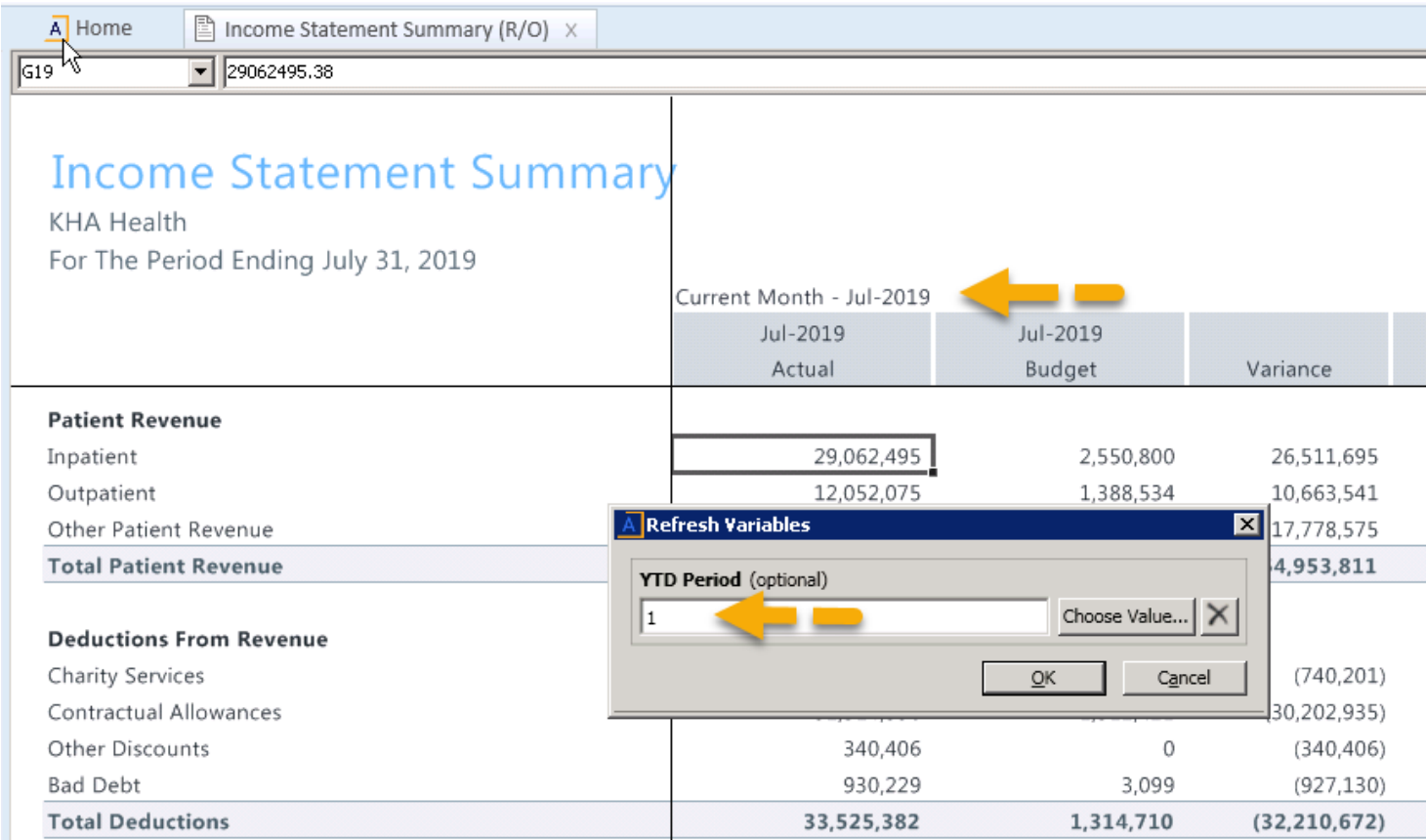
We do NOT recommend doing this at the start of your new fiscal year.



# HOW THE SYSTEM IS AFFECTED

## Reporting

- Affected by the change in the FYE and selectors such as YTD Period in a refresh variable would now apply to the **current** FYE.





# HOW THE SYSTEM IS AFFECTED

## Reporting

- Reports will typically have a ‘variables’ tab containing report attributes related to fiscal years.

Home

Income Statement Summary (R/O)

O42

	E	F	G	H	I	J	K	L	M	
8										
9										
10	<b>Report Variables</b>				Current	LY	NY		CY	LY
11	Code Description				Period	Period	Period		YTD	YT
12										
13	CALENDAR									
14										
15	System Period					8				
16	Current Period					1				
17	Calendar Month of 1st Fiscal Period					7				
18	Current Calendar Month					7				
19	Calendar Year					2019				
20	Current Year					2020	2019	2021		2018
21	Current Month 1				July					
22	Current Month 2				Jul-2019	Jul-2018	Jul-2020			



# HOW THE SYSTEM IS AFFECTED

## Reporting

- Data tables have ‘Summary fields’ that contain data based on the setting of the FYE and the period selected.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
3																								
4		Data Type					Integer	Integer	Integer		Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric
5		String Length																						
6		Description																						
7																								
8		Delete Row	ACC	DEP	INITIATIVE		P1	P2	P3	CUR	Q1	Q2	Q3	Q4	TOT	YTD	YTD1	YTD10	YTD11	YTD12	YTD2	YTD3	YTD4	YTD5
9			0	27200	1		702.00	809.00	669.00	739.00	2180.00	1978.00	1476.00	0.00	5634.00	5634.00	702.00	5634.00	5634.00	5634.00	1511.00	2180.00	2810.00	3498.00
10			110	27200	1		295.00	364.00	270.00	310.00	929.00	797.00	560.00	0.00	2286.00	2286.00	295.00	2286.00	2286.00	2286.00	659.00	929.00	1145.00	1454.00
11			120	27200	1		454.00	560.00	415.00	477.00	1429.00	1225.00	861.00	0.00	3515.00	3515.00	454.00	3515.00	3515.00	3515.00	1014.00	1429.00	1761.00	2236.00
12			210	27200	1		491.00	568.00	491.00	541.00	1550.00	1411.00	1119.00	0.00	4080.00	4080.00	491.00	4080.00	4080.00	4080.00	1059.00	1550.00	2020.00	2488.00
13			220	27200	1		755.00	874.00	755.00	832.00	2384.00	2170.00	1721.00	0.00	6275.00	6275.00	755.00	6275.00	6275.00	6275.00	1629.00	2384.00	3107.00	3827.00

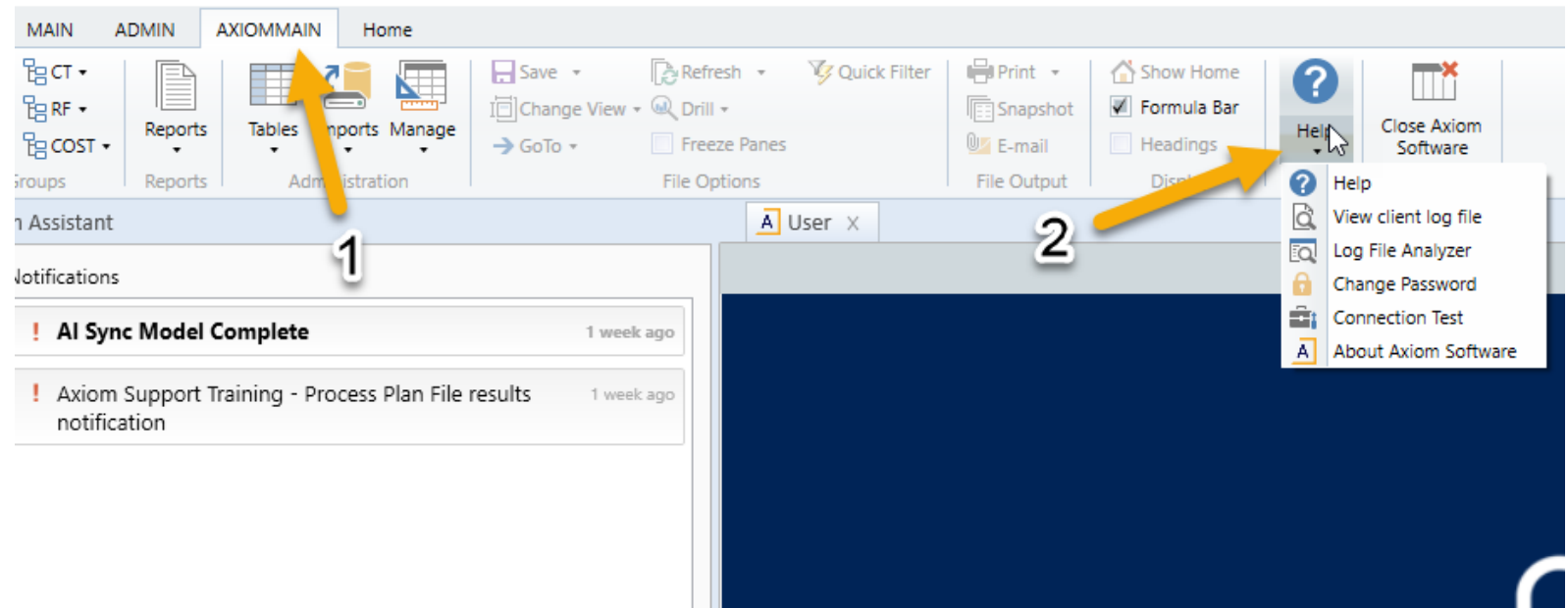
# Using The Client Audit Log

# CLIENT AUDIT LOG

- How to Locate it
- Log Analyzer
- What log files capture
- Searching for relevant activity
- Log file use case
- Sending log files

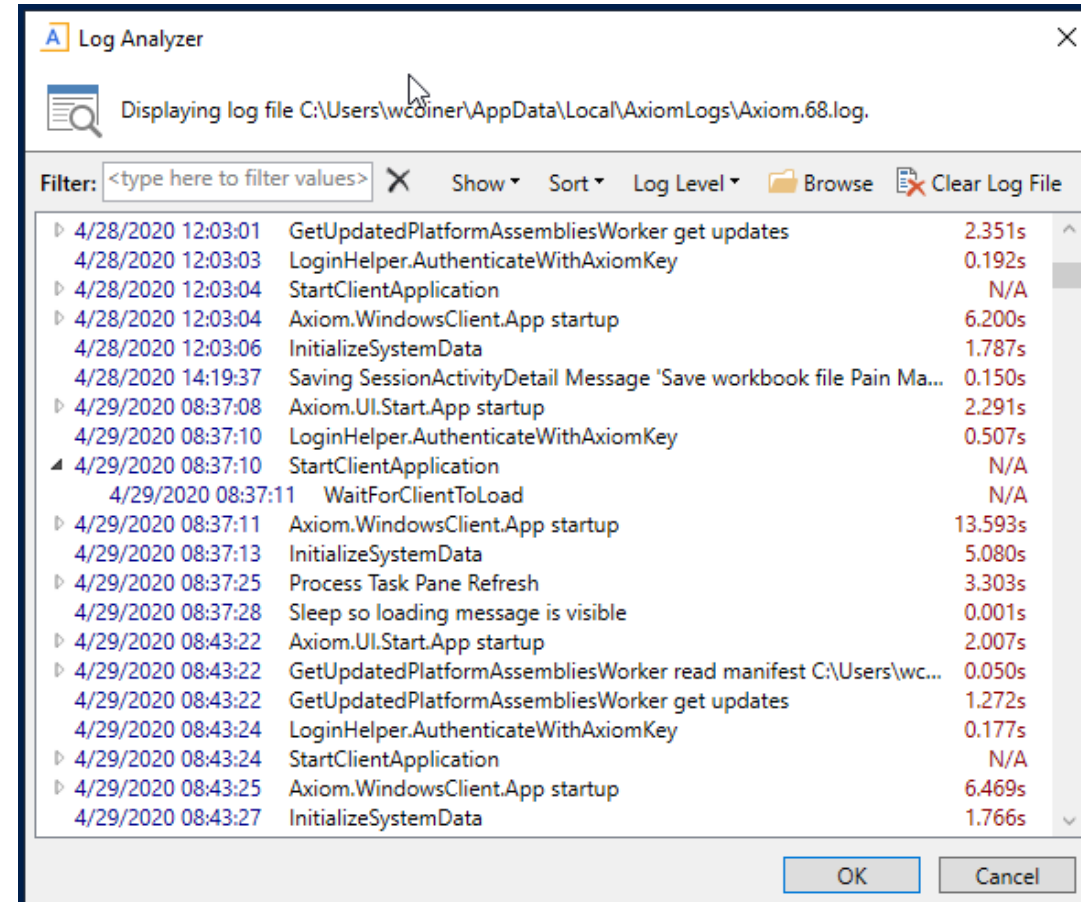
# HOW TO LOCATE IT

1. Navigate to the AXIOMMAIN or ADMIN ribbon
2. Click on the Help dropdown
3. Select View client log file



# LOG ANALYZER

- Displaying log file – provides file location on workstation of log file being displayed
- Filter text box
  - Can filter by keyword. Ex. “error”, “save”, “import”
  - Will search all child nodes within activity
- Show – filters by activity data from today, yesterday, or all
- Log level – once change impacts all future logs to log file
  - Info – default; includes error details and high level activity
  - Verbose – includes detailed query activity including SQL
- Browse – Navigate local file browser
- Clear Log File – Clears latest log file from AxiomLogs folder





# WHAT LOG FILES CAPTURE

- Log files capture local workstation activity in Axiom
  - What files were opened and activity inside those files, including queries ran
  - Logs error messages and other warnings
  - If set to verbose, can capture activity details, such as query details
  - Includes the dates and times of each action
- This information can help Support narrow down the specific actions or behaviors that may be causing a particular issue

# SEARCHING FOR RELEVANT ACTIVITY

- Open the log file via View Client log file or by navigating to the log file on your computer and opening in Excel or your favorite text editor
- Search using CTRL + F to find errors or other important information quickly
- Can also search by date and time using the format yyyy-mm-dd hh:mm:ss

2 | DEBUG 2020-05-03 19:03:23,570 [PID:1][8472][1] - AddSessionIdCookie:AxiomSecurityClientBehavior: AxiomSessionId=484119

3 | DEBUG 2020-05-03 19:03:24,280 [PID:1][8472][1] - Sql:

4 | select TOP(10001) q.\* FROM ( SELECT

5 | coalesce(SUM(cast("X41128\_210048230\_Y" as decimal(30,15))),0) as "X41128\_210048230\_Y"

6 | ,coalesce(SUM(cast("X8530\_970487060\_Y" as decimal(30,15))),0) as "X8530\_970487060\_Y"

7 | ,coalesce(SUM(cast("X41128\_926662780\_Y" as decimal(30,15))),0) as "X41128\_926662780\_Y"

8 | ,coalesce(SUM(cast("X41128\_1882611763\_Y" as decimal(30,15))),0) as "X41128\_1882611763\_Y"

9 | ,coalesce(SUM(cast("X41128\_562776450\_Y" as decimal(30,15))),0) as "X41128\_562776450\_Y"

10 | ,coalesce(SUM(cast("X41128\_1255427500\_Y" as decimal(30,15))),0) as "X41128\_1255427500\_Y"

11 | ,coalesce(SUM(cast("X8530\_861757682\_Y" as decimal(30,15))),0) as "X8530\_861757682\_Y"

12 | ,coalesce(SUM(cast("X8530\_878458853\_Y" as decimal(30,15))),0) as "X8530\_878458853\_Y"

13 | ,coalesce(SUM(cast("X8530\_34569820\_Y" as decimal(30,15))),0) as "X8530\_34569820\_Y"

14 | ,coalesce(SUM(cast("X8530\_1433674250\_Y" as decimal(30,15))),0) as "X8530\_1433674250\_Y"

15 | , "X13492\_1098015233\_Y" as "X13492\_1098015233\_Y"

16 | ,coalesce(MAX("X13494\_570606483\_Y"),") as "X13494\_570606483\_Y"

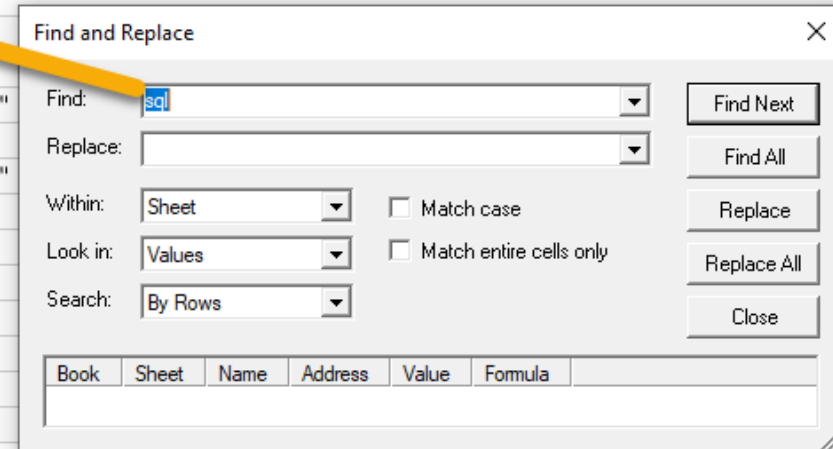
17 | ,coalesce(MAX("X16105\_861250511\_Y"),") as "X16105\_861250511\_Y"

18 | ,ROW\_NUMBER() OVER (Order by coalesce("X13492\_1098015233\_Y",0) ASC) as AXROWNUM

19 | ,/\*4\*/coalesce(cast("X13492\_1098015233\_Y" as nvarchar(19)),") as AXKEYS

20 | FROM (

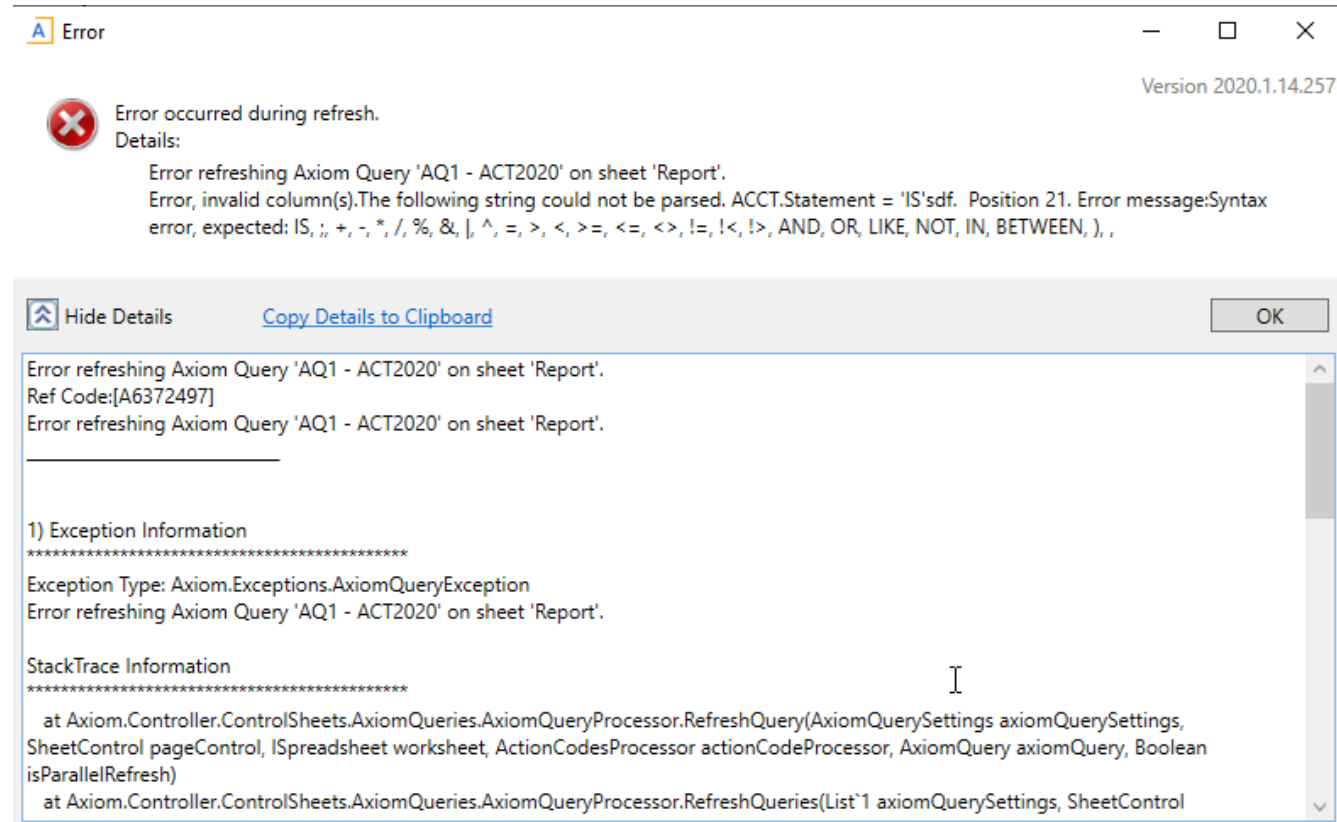
21 | SFI FCT



The image shows an Excel 'Find and Replace' dialog box overlaid on a log file. A yellow arrow points from the text 'Sql:' in the log file to the 'Find' input field in the dialog box, which contains the text 'sql'. The dialog box has fields for 'Find:', 'Replace:', 'Within:' (set to 'Sheet'), 'Look in:' (set to 'Values'), and 'Search:' (set to 'By Rows'). There are checkboxes for 'Match case' and 'Match entire cells only', both of which are unchecked. Buttons for 'Find Next', 'Find All', 'Replace', 'Replace All', and 'Close' are on the right. At the bottom, there are tabs for 'Book', 'Sheet', 'Name', 'Address', 'Value', and 'Formula'.

# LOG FILES USE CASE

- Most often the information you glean from the client log files you have available when you stumble upon an error message in Axiom
- When you receive an error message you can click the 'More Details' button to view the error message detail
- These details are what you'd find in the log files
- What the log files allow you to do is easily share that information once you've closed the error dialog box
- This provides the MSU, Support, or anyone else tasked with sourcing and resolving the issue a record of the error message and when it occurred
- This can be used to correlate the time and behavior with other activity in the system



# SENDING LOG FILES

- Axiom Support or internal IT may request log files to track and isolate issues
- They are by default located here:  
C:\Users\{Username}\AppData\Local\AxiomLogs\
- The location can also be found in the Log Analyzer
- You can send the latest log file as you would other files via email attachment.

# ADDITIONAL HELP FILE RESOURCES

- AX2460: Viewing the client log file
- KB1014: Sending log files for the Axiom Desktop Client to Support

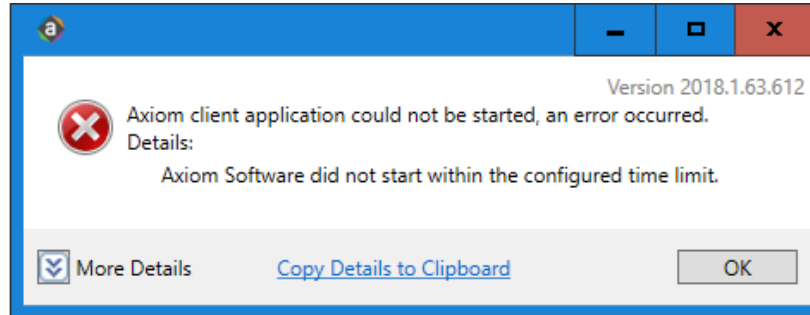
# Connectivity Issues

# CONNECTIVITY ISSUES

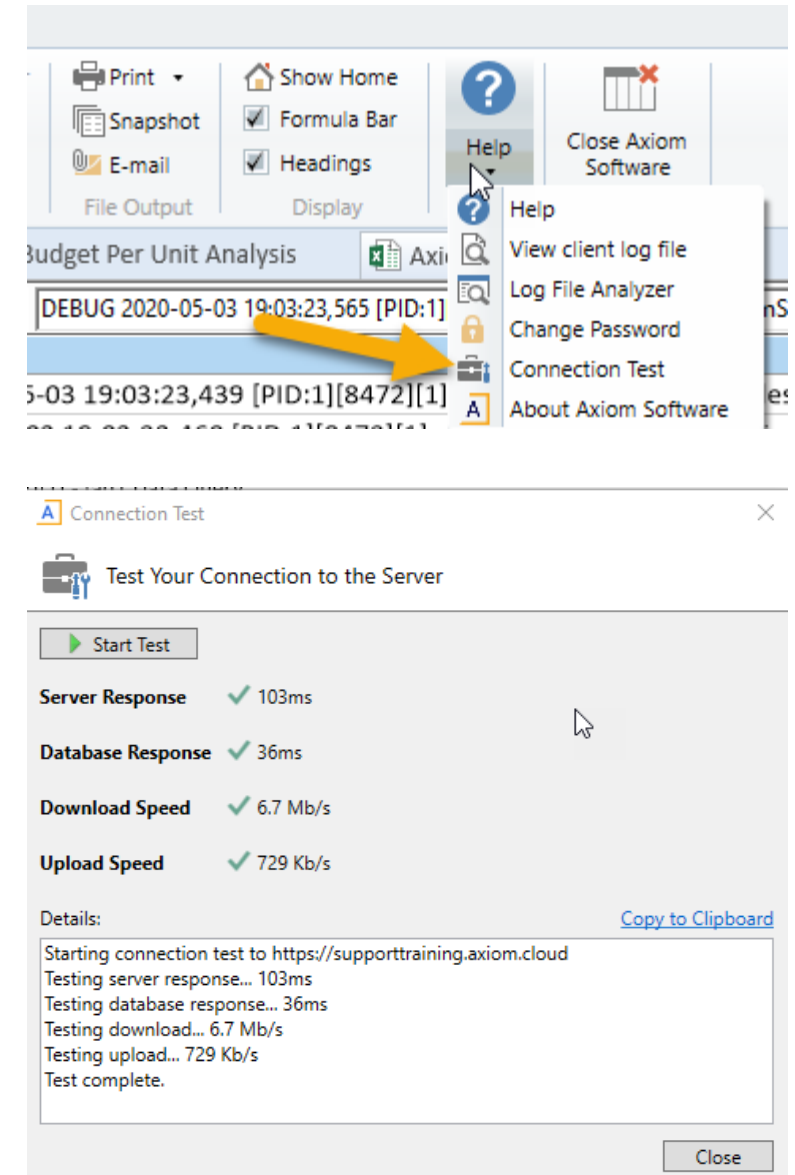
1. Reach out to Master System User (MSU) that internally manages your system to investigate
  - a) Run Connection test and provide results to MSU
2. MSU should collect and analyze:
  - a) Error messages
  - b) Most recent log files from user
  - c) Identify asset(s) user is experiencing slow performance
  - d) User provide steps taken that resulted in poor performance
  - e) Reproduce to confirm issue is not unique to user workstation
  - f) Run Connection Test
  - g) Analyze system usage (scheduler, user activity)
  - h) Run report Diagnostics to analyze asset performance
  - i) Use Audit Manager to track user activity and confirm performance
3. Provide findings to KH Support if unable to isolate and resolve

# COLLECT AND ANALYZE

1. Error messages – have user provide screenshots of any error messages



2. Have user provide most recent log files
3. Identify file (report, import, etc.) that is performing slowly
4. User provide steps taken that result in poor performance
5. Reproduce using steps user provided
  - If unable to reproduce issue may be unique to user workstation or network connection
6. Run Axiom Connection Test and save results to your clipboard
  - Recommend at least 700 kB/s down and 700 kB/s up





# COLLECT AND ANALYZE

## 7. Analyze system usage

- Check Scheduled Jobs for any long running scheduled jobs that may be impacting performance
- Reschedule long running jobs for overnight

Axiom Scheduler - Scheduled Jobs

Job Service

Scheduled Jobs Event Handlers Remote Data Connections Results Servers Refresh

Service View Actions

Scheduled Jobs System.SystemDataPurge

ID	Job	User	Status	Server	Priority	Start Time	Due In
360971	System.SystemDataPurge	System	Working	RD00155DE0FC27-System	Manual	5/3/2020 19:43	
360968	UpdateInitiativeStatus-SQL	khasupport	Pending		Scheduled Job	5/3/2020 19:45	1.48 minutes
360970	System.ProcessNotification	System	Pending		Scheduled Job	5/3/2020 20:01	17.48 minutes
360818	System.SystemDataPurge	System	Pending		Scheduled Job	5/3/2020 22:00	2.27 hours
360757	UpdateMeasureDatafromSta	khasupport	Pending		Scheduled Job	5/3/2020 22:59	3.26 hours
360824	System.IndexMaintenance	System	Pending		Scheduled Job	5/4/2020 03:15	7.52 hours

# COLLECT AND ANALYZE

## 7. Analyze system usage

- Open Audit Manager and sort by date and/or activity duration
- Look for activity that correlates with the timeframe of the performance issue

System Administration

Activities User Sessions

From:  To:  Activity Types:  Document:  ☐ Include scheduler clients

User:  Table:

Top-level activities 100 activities\*

Activity Type	Activity Name	User Session	Started	Ended	Duration	Children
Save Document	1003653.xlsx	Support KHA (shesupport)	2020-03-16 9:16:45 AM	2020-03-16 9:16:52 AM	6s 620ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:16:58 AM	2020-03-16 9:16:59 AM	0ms	0 children
Autom Explorer	AssessExploitWindow	Support KHA (shesupport)	2020-03-16 9:16:26 AM	2020-03-16 9:17:01 AM	34s 953ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:41 AM	2020-03-16 9:14:41 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:41 AM	2020-03-16 9:14:41 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:41 AM	2020-03-16 9:14:41 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:41 AM	2020-03-16 9:14:41 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:40 AM	2020-03-16 9:14:40 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:40 AM	2020-03-16 9:14:40 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:40 AM	2020-03-16 9:14:40 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:40 AM	2020-03-16 9:14:40 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:39 AM	2020-03-16 9:14:39 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:39 AM	2020-03-16 9:14:39 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:39 AM	2020-03-16 9:14:39 AM	0ms	0 children
Autom Query	Refresh On Open Home Page.xlsx	Support KHA (shesupport)	2020-03-16 9:14:33 AM	2020-03-16 9:14:35 AM	1s 530ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:32 AM	2020-03-16 9:14:32 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:31 AM	2020-03-16 9:14:31 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:30 AM	2020-03-16 9:14:31 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:30 AM	2020-03-16 9:14:30 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:30 AM	2020-03-16 9:14:30 AM	0ms	0 children
Open Document	GetDocumentData	Support KHA (shesupport)	2020-03-16 9:14:29 AM	2020-03-16 9:14:29 AM	0ms	0 children

Details for 1003653.xlsx

Related Tables:  
Document

Related Documents:  
1003653.xlsx open document

Detail Messages:  
AccessType=Update DocumentVersion? 14Success=True

# COLLECT ANALYZE

8. Run QA Diagnostics to analyze asset performance

- Will likely need to add this command to your task pane or ribbon menu
- The steps to add the command and run diagnostics can be found in the Help files under AX2270 and AX1160
- Analyze the results, paying close attention to any warnings

Document Test Results (07/12/2019 10:47:53)																																			
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Document Info:																																			
<table border="1"> <tr> <td>Document Tested:</td><td colspan="5">Budget Account Analysis.xlsx</td></tr> <tr> <td>Path:</td><td colspan="5">\Axiom\Reports Library\Budget Reports\Budget Account Analysis.xlsx</td></tr> <tr> <td>File Size (bytes):</td><td colspan="5">46072</td></tr> <tr> <td>Last Modified By:</td><td colspan="5">admin</td></tr> <tr> <td>Last Modified Date:</td><td colspan="5" rowspan="3">3/21/2019 1:27 PM</td></tr> </table>						Document Tested:	Budget Account Analysis.xlsx					Path:	\Axiom\Reports Library\Budget Reports\Budget Account Analysis.xlsx					File Size (bytes):	46072					Last Modified By:	admin					Last Modified Date:	3/21/2019 1:27 PM				
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—	<b><u>Refresh Active AQs</u></b> Description: All AQs should refresh without any errors. Result: No errors or warnings found. Expected: No Errors. Outcome: PASSED Time: < 1 sec Additional Info:																																		
	<table border="1"> <thead> <tr> <th>Name</th><th>Result</th><th>Details</th></tr> </thead> <tbody> <tr> <td>Find Unmatched AQ Data</td><td>0</td><td>No errors or warnings found.</td></tr> <tr> <td>Scan For Missing AQ Tags</td><td>0</td><td>No errors or warnings found.</td></tr> <tr> <td>Check AQ Names</td><td>0</td><td>No errors or warnings found.</td></tr> </tbody> </table>					Name	Result	Details	Find Unmatched AQ Data	0	No errors or warnings found.	Scan For Missing AQ Tags	0	No errors or warnings found.	Check AQ Names	0	No errors or warnings found.																		
Name	Result	Details																																	
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Check AQ Names	0	No errors or warnings found.																																	
+	<b><u>Find Unmatched AQ Data</u></b> Outcome: SKIPPED																																		

# PROVIDE FINDINGS TO KAUFMAN HALL SUPPORT

- If you are unable to isolate and resolve the issue, please contact Axiom Support.
  - Email [support@kaufmanhall.com](mailto:support@kaufmanhall.com) to open a case
  - Provide your analysis
  - Providing as much information as possible can help expedite time to resolution
- Remember:
  - You will almost always know your system better than the analyst assigned to your case.
  - The more information you can provide the more context the analyst will have to help resolve the issue

# ADDITIONAL HELP FILE RESOURCES

- AX1490: Viewing the audit log
- AX2270: Using file diagnostics for troubleshooting and optimization
- AX2549: Scheduler administration
- AX1388: Testing connection speed
- March Webinar on using the Audit Manager
  - Found in the Help files

[More Information](#) | [Troubleshooting](#) | [Axiom Insights–Webinar Archive](#)

# Questions and Answers

Please send suggestions for future webinars to

[ClientRelations@kaufmanhall.com](mailto:ClientRelations@kaufmanhall.com)