KaufmanHall

AXIOM

AXIOM INSIGHTS webinar

(Based upon Version 2019.3)

Moderator: Anastasia Rundus, Client Relationship Executive

Wil Coiner, Client Analyst

Deb Miller, Client Services Account Executive

December, 2019

AGENDA

- Introductions & Webinar instructions
- Overview of the online Axiom HELP system
- Steps to take if the software appears slow
- Using the Audit Manager to track activity
- Common import data errors
- Common issues with scheduled imports and results
- Process flow and plan file security configuration
- Questions and Answers

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REGISTRATION IS OPEN!

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AXIOM

Axiom 2019.4 Analytical Highlights

December 19, 2019

1:00 – 2:00 PM Eastern

Preview enhancements that help improve decision-making:

Axiom Decision Support: Integration of cost/clinical data

Axiom Cost Accounting: Enhanced integration with Epic

Axiom Comparative Analytics: Harness the power of data science

Register: Visit the "Events" page on kaufmanhall.com

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Overview of the online Axiom HELP system

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OVERVIEW OF THE ONLINE AXIOM HELP SYSTEM

- Overview
    - Product-Based Resources
    - Training Resources
    - Support Resources
    - Utilities
    - About Axiom Software

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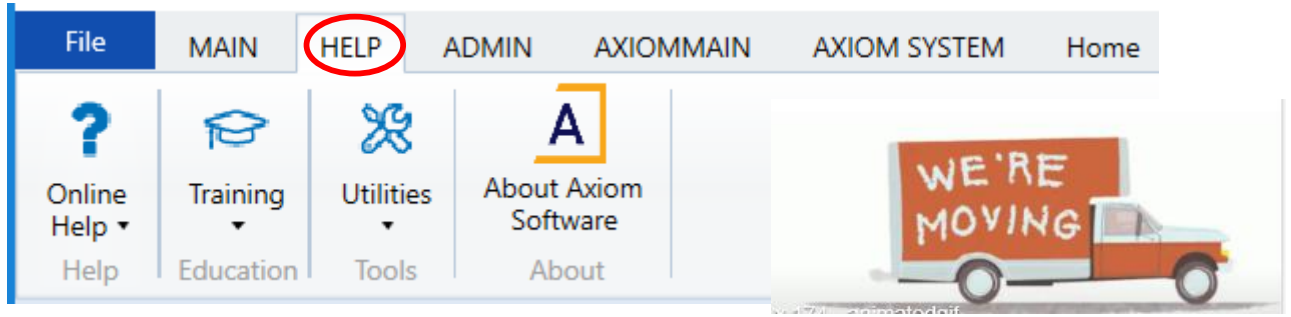
AXIOM HELP – OVERVIEW



NOTE - With the release of Version 2019.4, all HELP options will be moved to the MAIN \ AXIOM MAIN or ADMIN \ AXIOM ADMIN menus

- From the Ribbon menu, access the **HELP** menu in either the Windows or Excel client
- Separate sections for:
  - Product-based documentation
  - Training resources and schedules
  - Utilities
  - About Axiom Software
- Selecting any option will take you to the KH Axiom Support website

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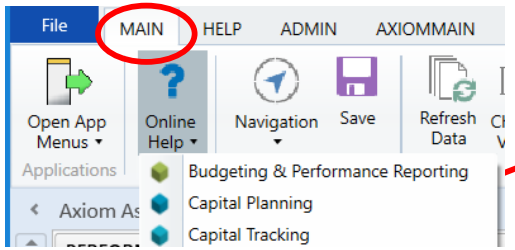
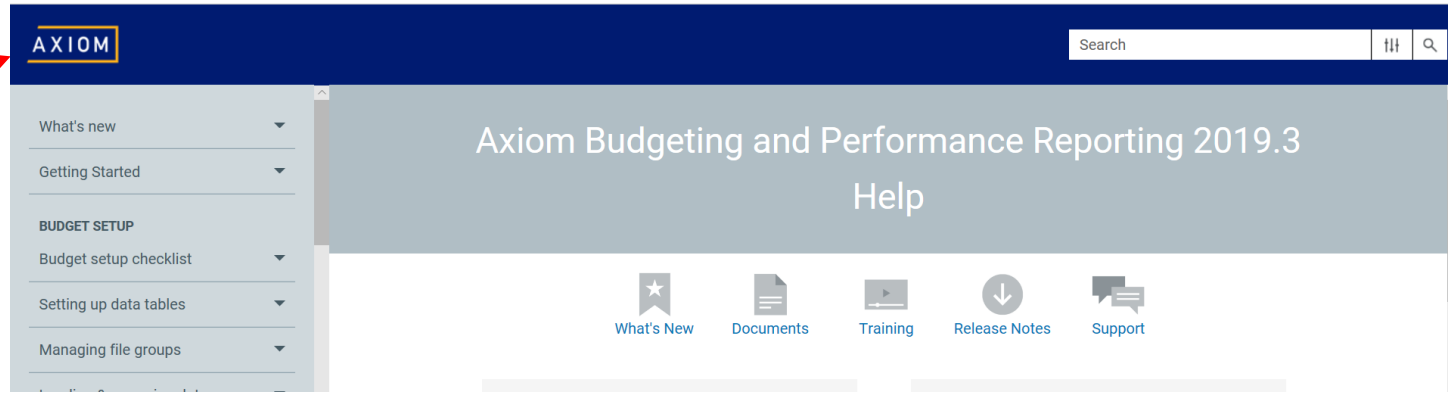
AXIOM HELP – ONLINE HELP





Online Help also available from the AxiomMain menu

- Product-based documentation is based upon the industry as well as the products which are licensed
  - What's New
  - Documents
    - Administrator's Guides
    - User Guides
    - Training Materials
  - Training – Register for classes and access on-demand videos
  - Release Notes – Current and previous releases
  - Support – How to contact
- Advanced Help – Takes you to the Axiom platform Help

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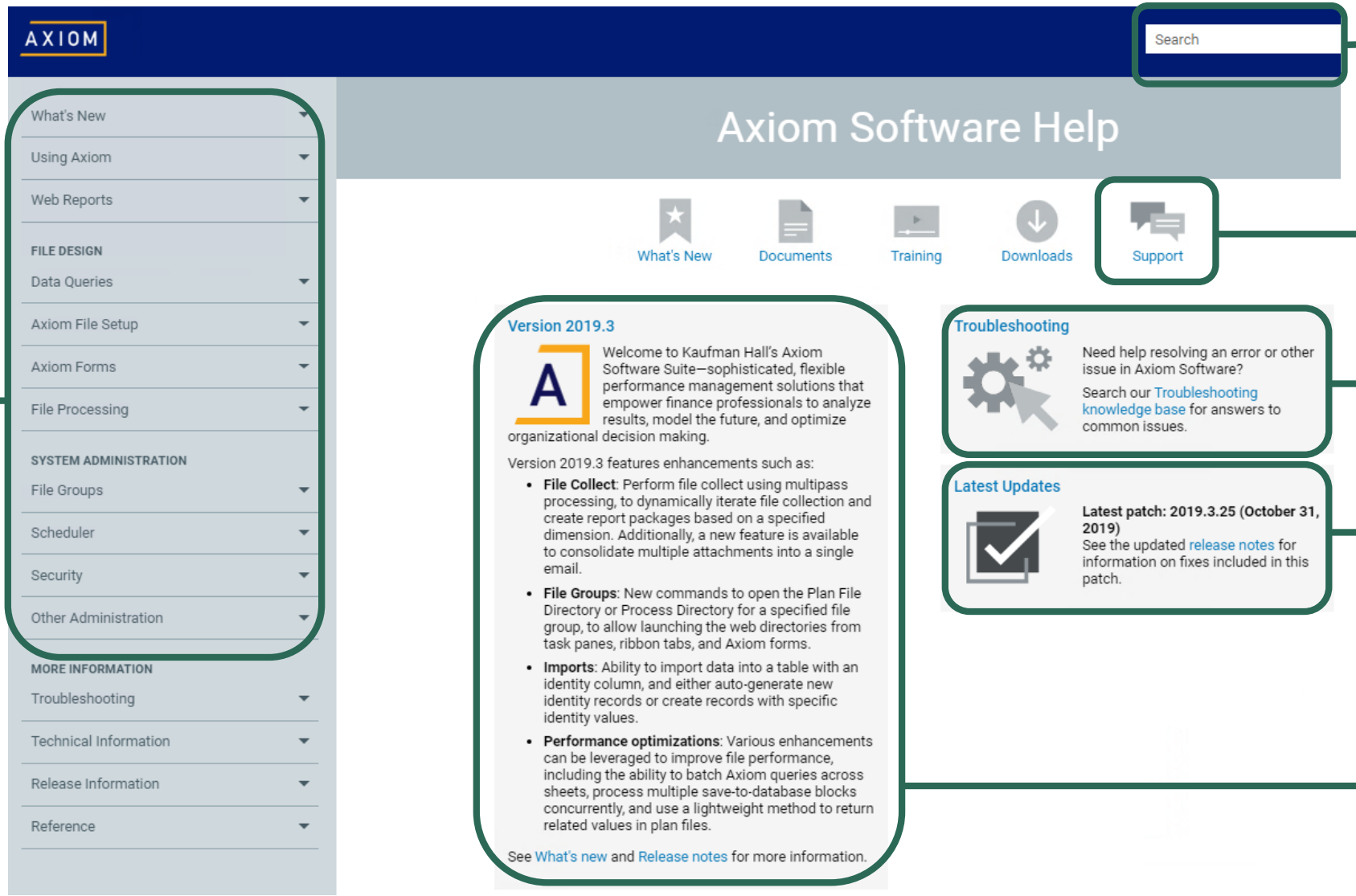
AXIOM HELP – ONLINE RESOURCES

Training on all Axiom features and capabilities



Start Here! Search across 8,000 included assets

Instructions for an MSU to escalate an issue to Support

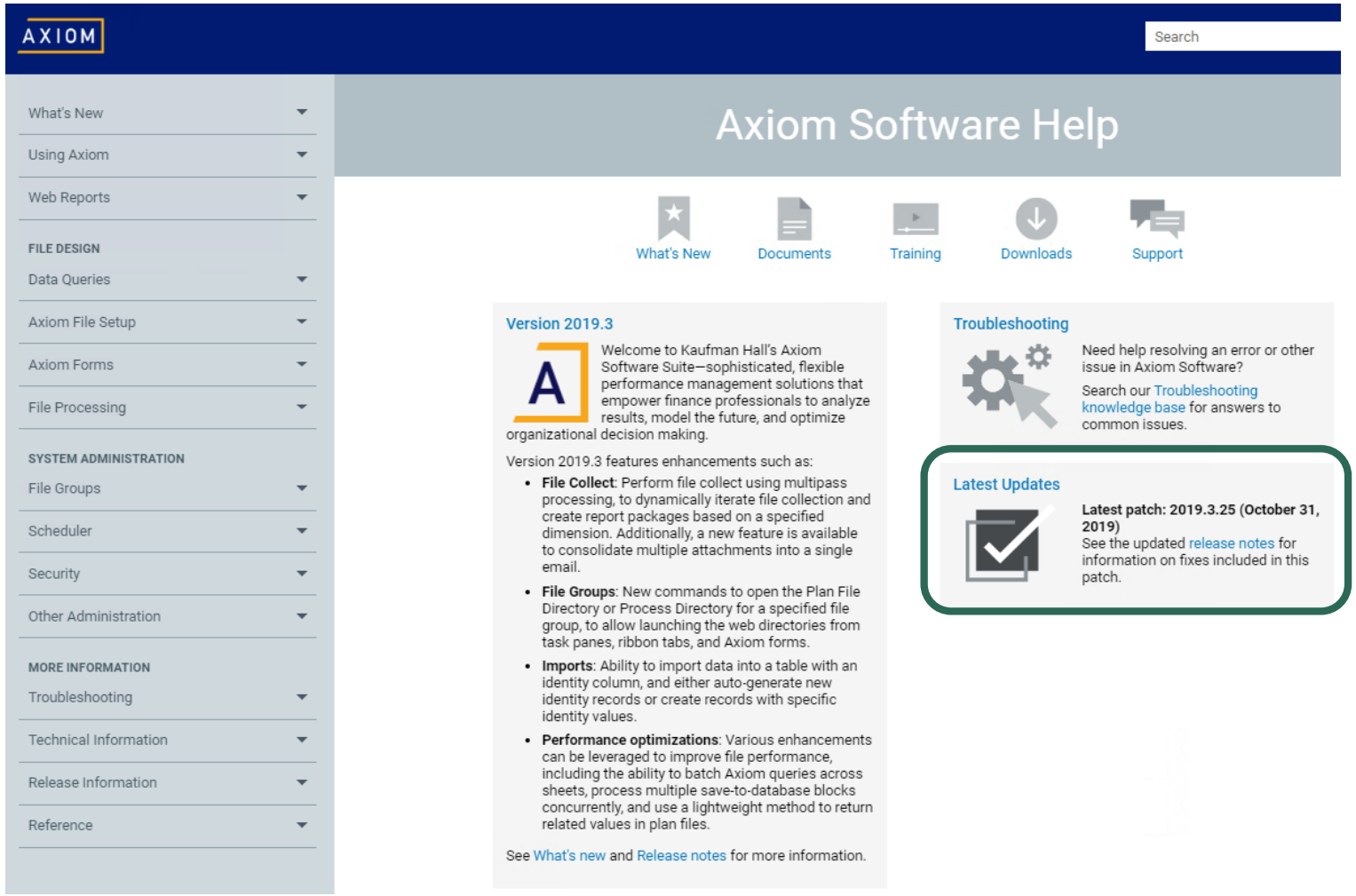
Instructions for an IT staff to resolve technical issues

Live view of our latest updates available to you

Newest features currently in your system

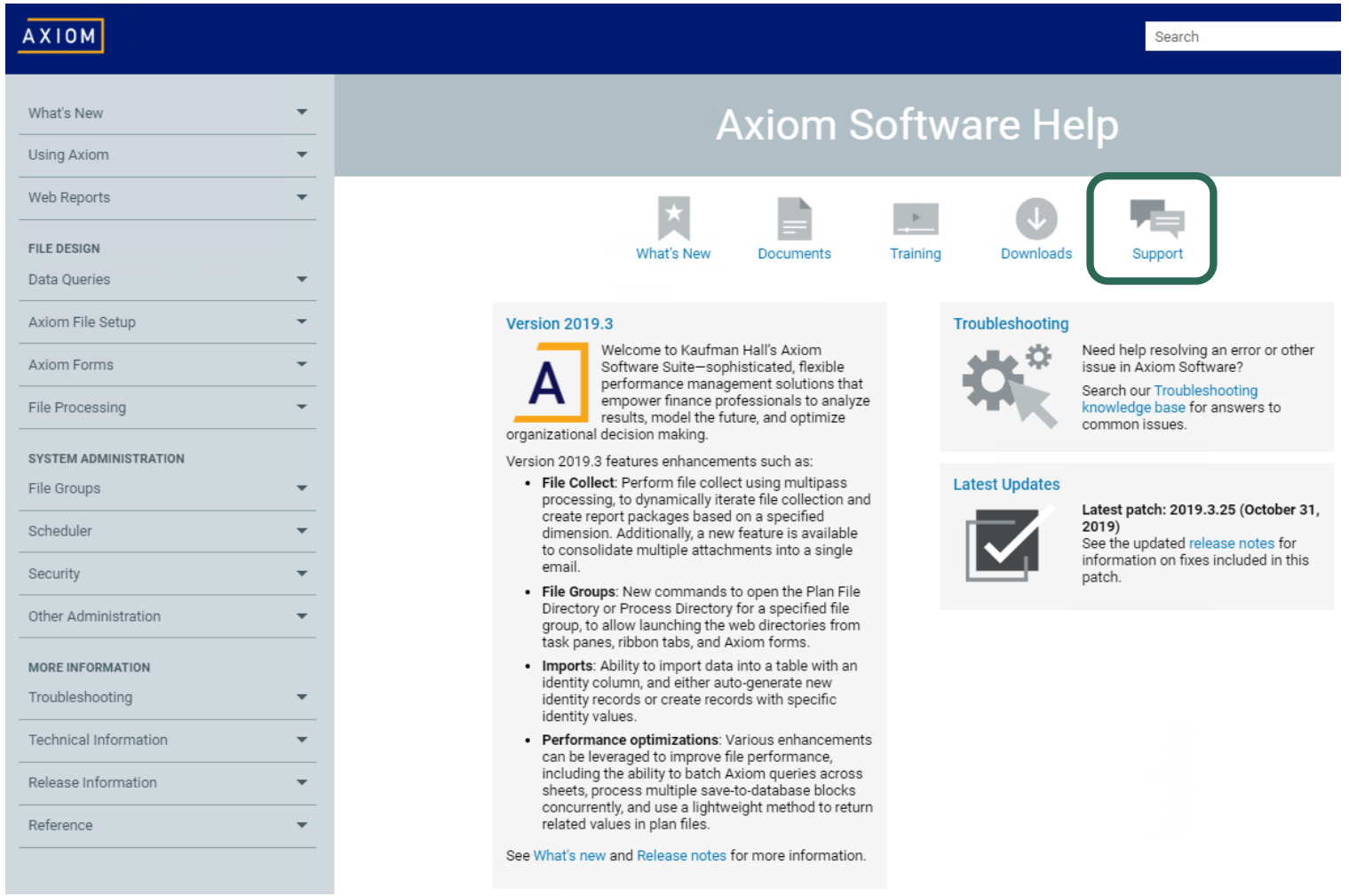
AXIOM HELP – SOFTWARE UPDATES

- Platform innovations released every quarter, all are cumulative and optional – and easy to apply
- Notifications are displayed in Axiom Help and provided via email
- SANDBOX - Axiom staff will update your sandbox environment at your request
- PRODUCTION - Axiom staff will update production when requested

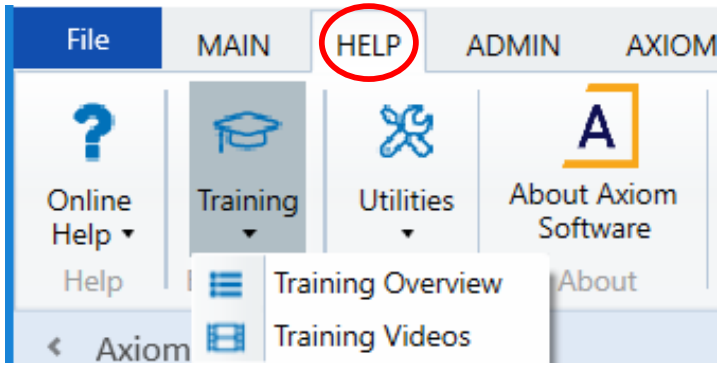


AXIOM HELP – CONTACTING SUPPORT

- Trained Administrators and MSUs of Axiom may contact Axiom Support for additional guidance on issues not resolved by Axiom Help resources
- Instructions, expectations and contact details are contained within **Axiom Help | Support**



AXIOM HELP – ONLINE TRAINING



NOTE - With the release of Version 2019.4, all OnLine Training will be available through Axiom Help on the MAIN or ADMIN ribbons.

- Training Overview
  - Register for free online training classes (except Axiom Academy)
  - Requires a KH Axiom website login
- Training Videos
  - On Demand recorded videos on a variety of subjects ranging from 1-60 minutes

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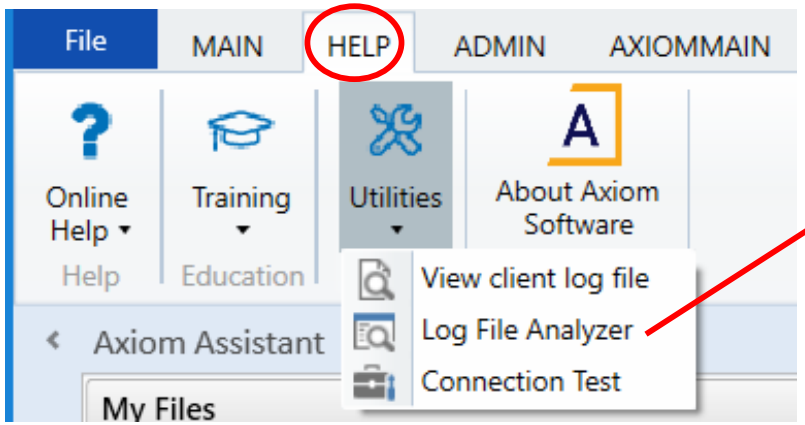
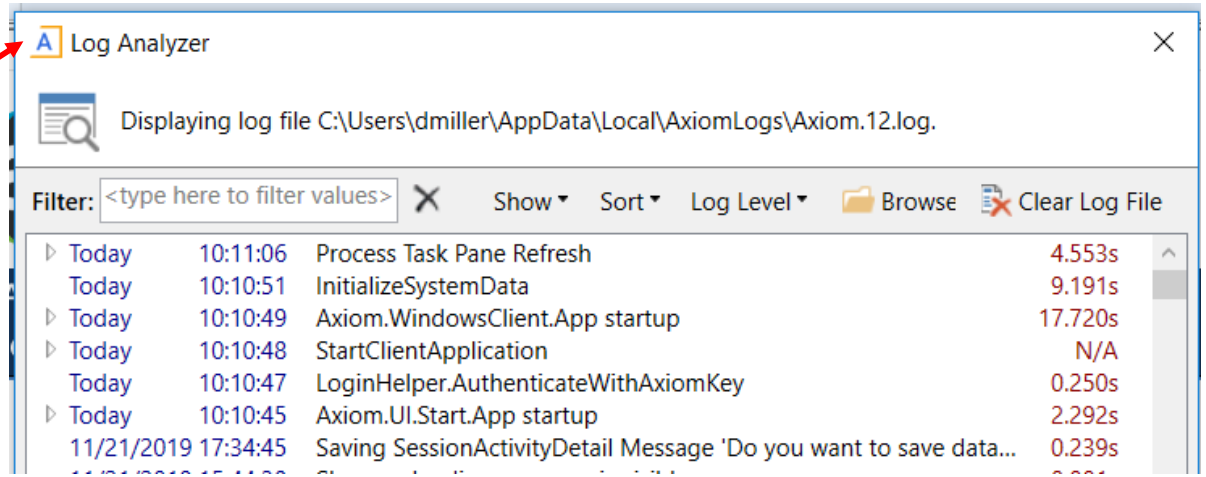
AXIOM HELP – UTILITIES





- View client log file
  - Creates spreadsheet log of activity from user workstation
- Log File Analyzer
  - Log of activity from user workstation
  - Filter options
- Connection Test

NOTE - With the release of Version 2019.4, these HELP options will be moved to the ADMIN \ AXIOM ADMIN menus

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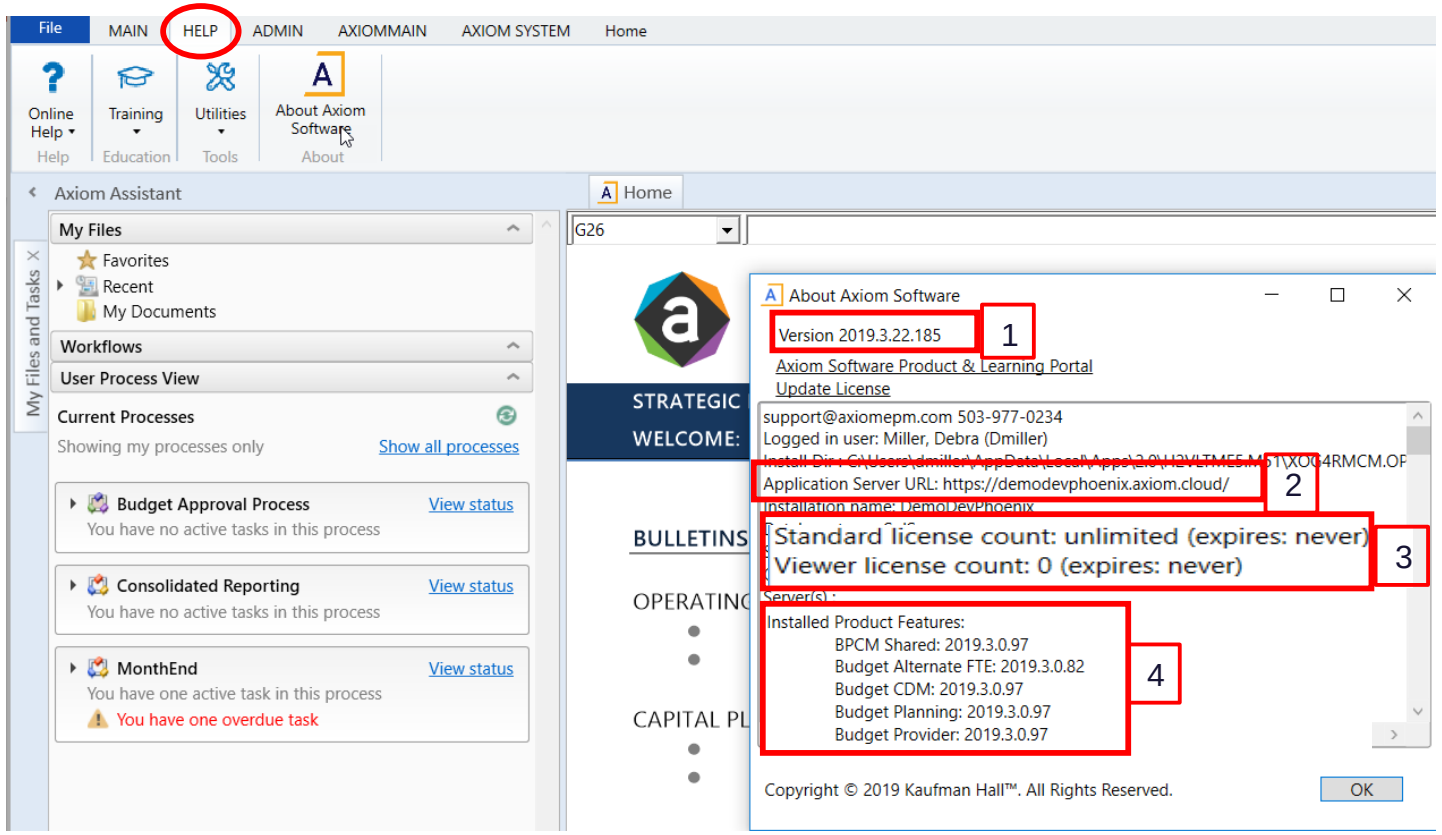
AXIOM HELP – ABOUT AXIOM SOFTWARE



1) Current Version of Platform Software

2) Application Server URL

3) License count and expiration date

4) List of installed products and product version

NOTE - With the release of Version 2019.4, these HELP options will be moved to the ADMIN \ AXIOM ADMIN menus

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Steps to take if the software appears slow

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SLOW PERFORMANCE TROUBLESHOOTING STEPS

- Scheduled Jobs consuming resources
- Isolate issue to systemic or local to workstation
- Review Audit Manager
- Determine whether unique to file/process or across system
- Test connectivity
- Contact Kaufman Hall Support

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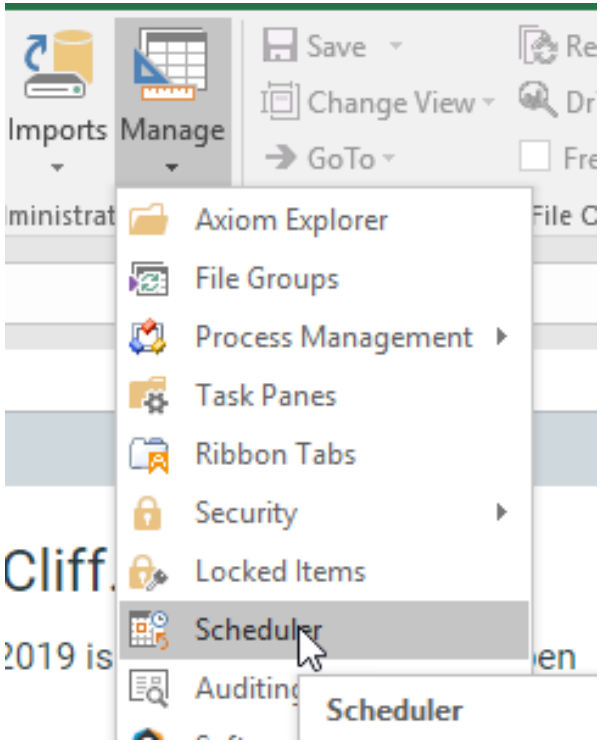
CHECK SCHEDULED JOBS

One or more scheduled jobs may be running and tying up resources.

Access the Scheduler Job details from the **Axiom Admin Ribbon | Scheduler**.



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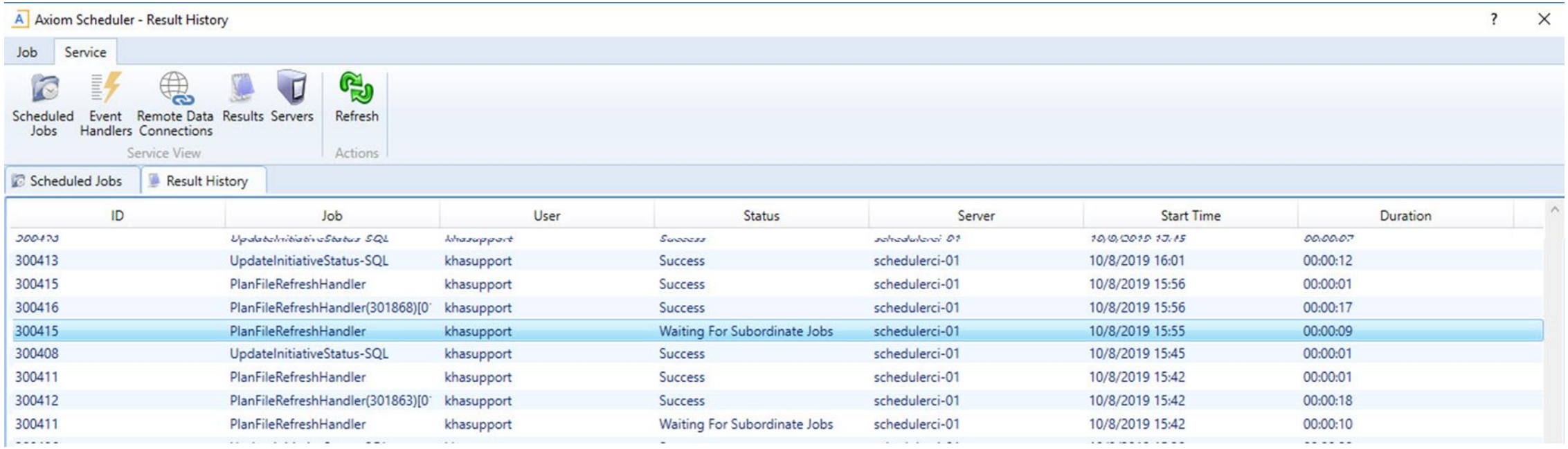
CHECK SCHEDULED JOBS

- The Scheduler screen initially shows jobs that are currently running or are scheduled for upcoming execution.
- Note any long running jobs that may be tying up Axiom.
- In particular, note any jobs running heavy duty imports.
- Right click on a job to get a context menu including the choice to abort the job.
- Also in the ribbon click on **Results** to review recently run jobs to see if timing of jobs coincides with reported system slowness.



ID	Job	User	Status	Server	Start Time	Duration
300413	UpdateInitiativeStatus-SQL	khasupport	Success	schedulerci-01	10/8/2019 16:01	00:00:12
300415	PlanFileRefreshHandler	khasupport	Success	schedulerci-01	10/8/2019 15:56	00:00:01
300416	PlanFileRefreshHandler(301868)[0	khasupport	Success	schedulerci-01	10/8/2019 15:56	00:00:17
300415	PlanFileRefreshHandler	khasupport	Waiting For Subordinate Jobs	schedulerci-01	10/8/2019 15:55	00:00:09
300408	UpdateInitiativeStatus-SQL	khasupport	Success	schedulerci-01	10/8/2019 15:45	00:00:01
300411	PlanFileRefreshHandler	khasupport	Success	schedulerci-01	10/8/2019 15:42	00:00:01
300412	PlanFileRefreshHandler(301863)[0	khasupport	Success	schedulerci-01	10/8/2019 15:42	00:00:18
300411	PlanFileRefreshHandler	khasupport	Waiting For Subordinate Jobs	schedulerci-01	10/8/2019 15:42	00:00:10

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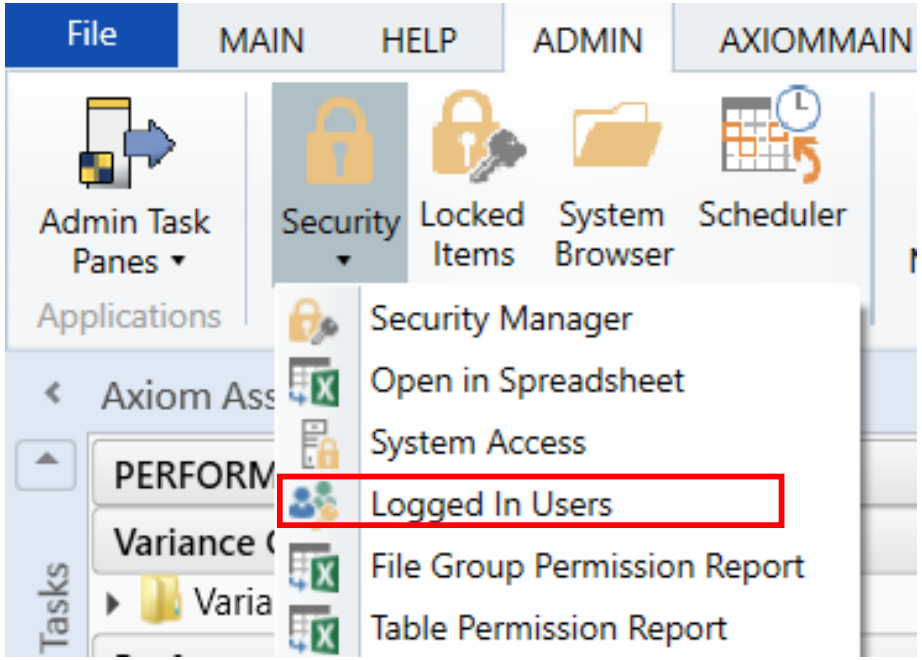
REVIEW NUMBER OF LOGGED IN USERS

From the **Axiom Admin Ribbon | Security | Logged in Users**

Note the number of users currently logged in.

This should only impact on-premise systems, as cloud systems are load balanced.



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SYSTEMIC OR LOCALIZED

- Is the error restricted to a few users or all users across the system?
  - Reach out to users currently in the system using Logged In Users
  - Confirm whether they are experiencing performance issues as well
- Reach out to internal IT to verify whether there were any recent updates to either workstations or the network that may be impacting performance

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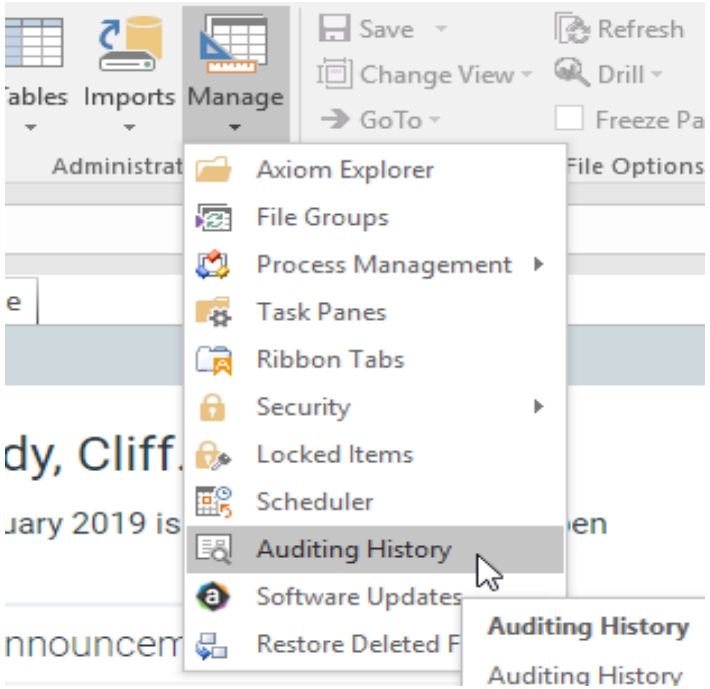
REVIEW AUDIT MANAGER

- Navigate to Audit Manager to review user activity
  - NonHealthcare - **AXIOM SYSTEM | Manage | Auditing History**
  - Healthcare - **ADMIN | System Tools | Manage | Auditing History**
- Take note of any actions that are taking longer than expected that may align with time of slowdown
- Note the date, time, and users
- Use filters to filter by user, timespan, or activity



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UNIQUE TO REPORT OR PROCESS

- If it has been determined that the performance issue is impacting all users determine whether the issue is unique to a certain file or process
  - Is it when users refresh a particular report
  - Is it when users run processing on a file
  - Is it when users run an import
- Take note and screen capture any error messages
- Logging in as another user you should see the same performance hit
- If unique to a report, run QA diagnostics (Help Article AX2270)

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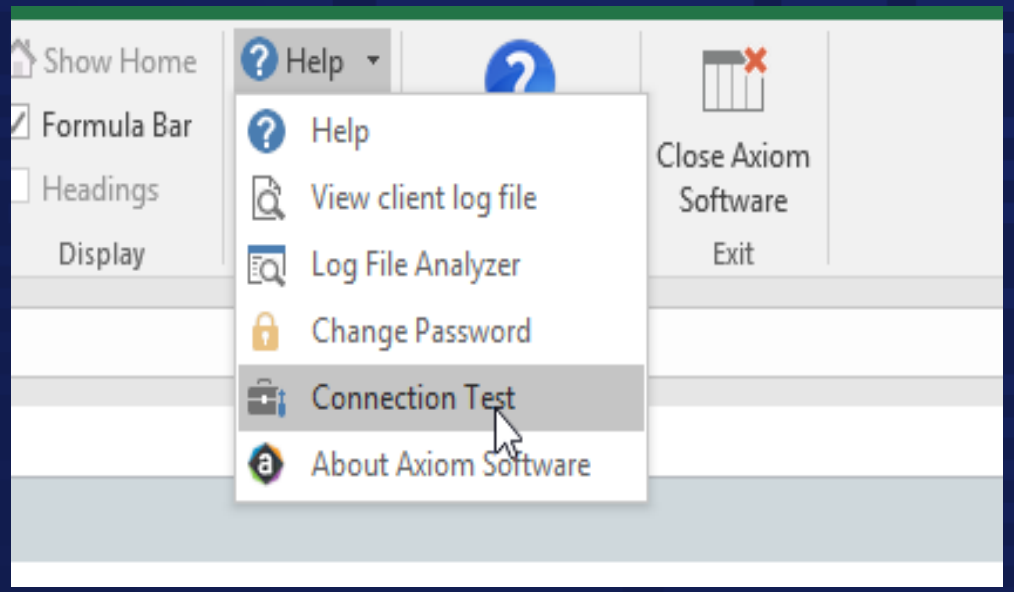
CONNECTION TEST

- Check Axiom connectivity

  Axiom Main | Help | Connection Test

  Admin | Help | Connection Test

- Start the test and note the results for Kaufman Hall support and internal IT
  - Anything over 1 MB/s download and upload is acceptable for Axiom
  - Anything less than 1 MB/s, please contact your IT staff
- Provide results to internal IT to have them confirm whether there are any network issues that may be impacting connectivity



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Provide Findings to KH Support

- Once you have gone through all the steps to isolate and attempt to resolve the issue, provide all findings to Kaufman Hall Support
- Make sure to loop in internal IT and confirm they have ruled out any internal network issues that may be impacting connectivity
- The more information you provide, the faster we can determine the root cause and resolve the issue

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Additional Resources

- AX2391: List of system documents, including system technical requirements
- AX1490: Viewing the audit log
- AX3400: Scheduler
- AX1388: Testing connection speed
- AX2270: Running QA Diagnostics

Search in HELP on document ID or using key words

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Using the Audit Manager to track activity

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AUDIT MANAGER

- How to Locate it?
- How to Use it?
- Other Audit Reporting?

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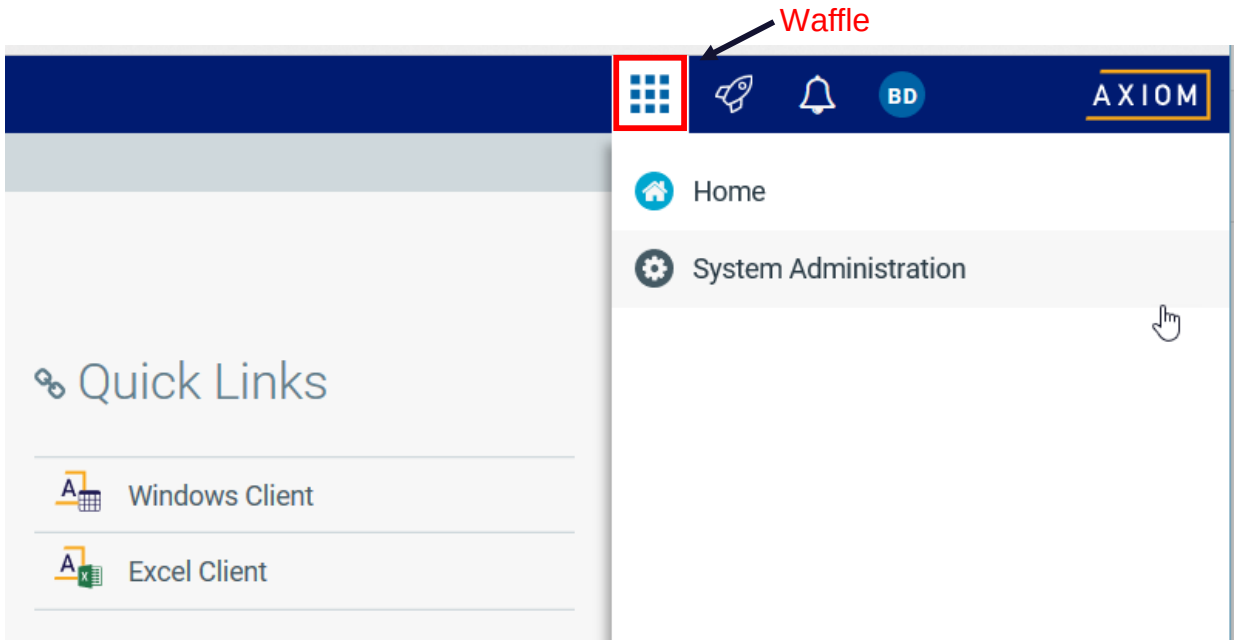
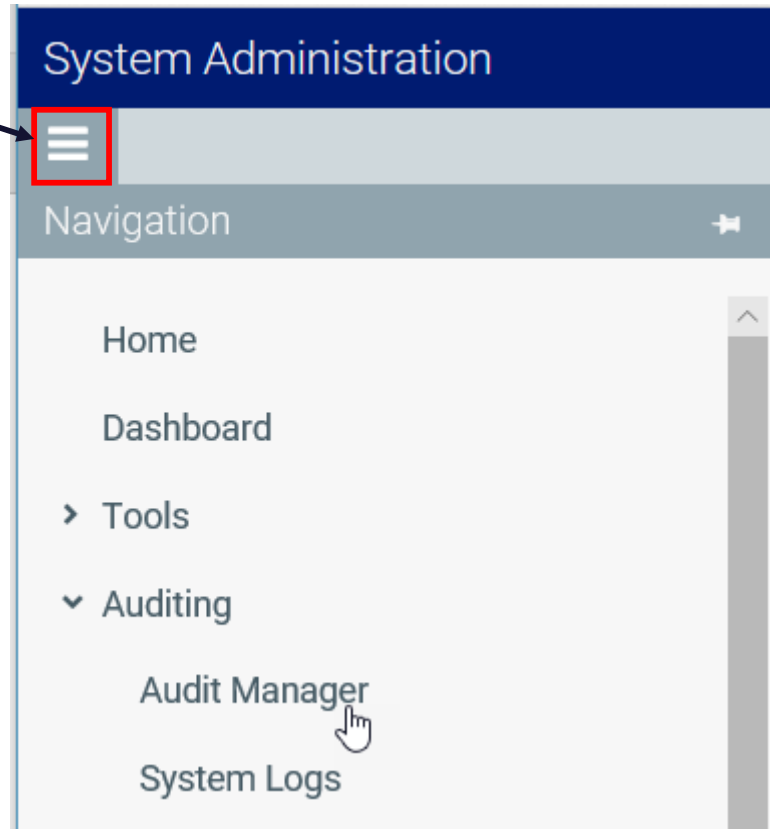
HOW TO LOCATE THE AUDIT MANAGER





1) On the **Axiom web login page**, click the icon that looks like a waffle from the Navigation Bar, then select **System Administration** from the drop down menu
2) Next click on the icon in the upper left that looks like a stack of pancakes in the Navigation Bar, then select **Auditing | Audit Manager** from the Navigation panel.

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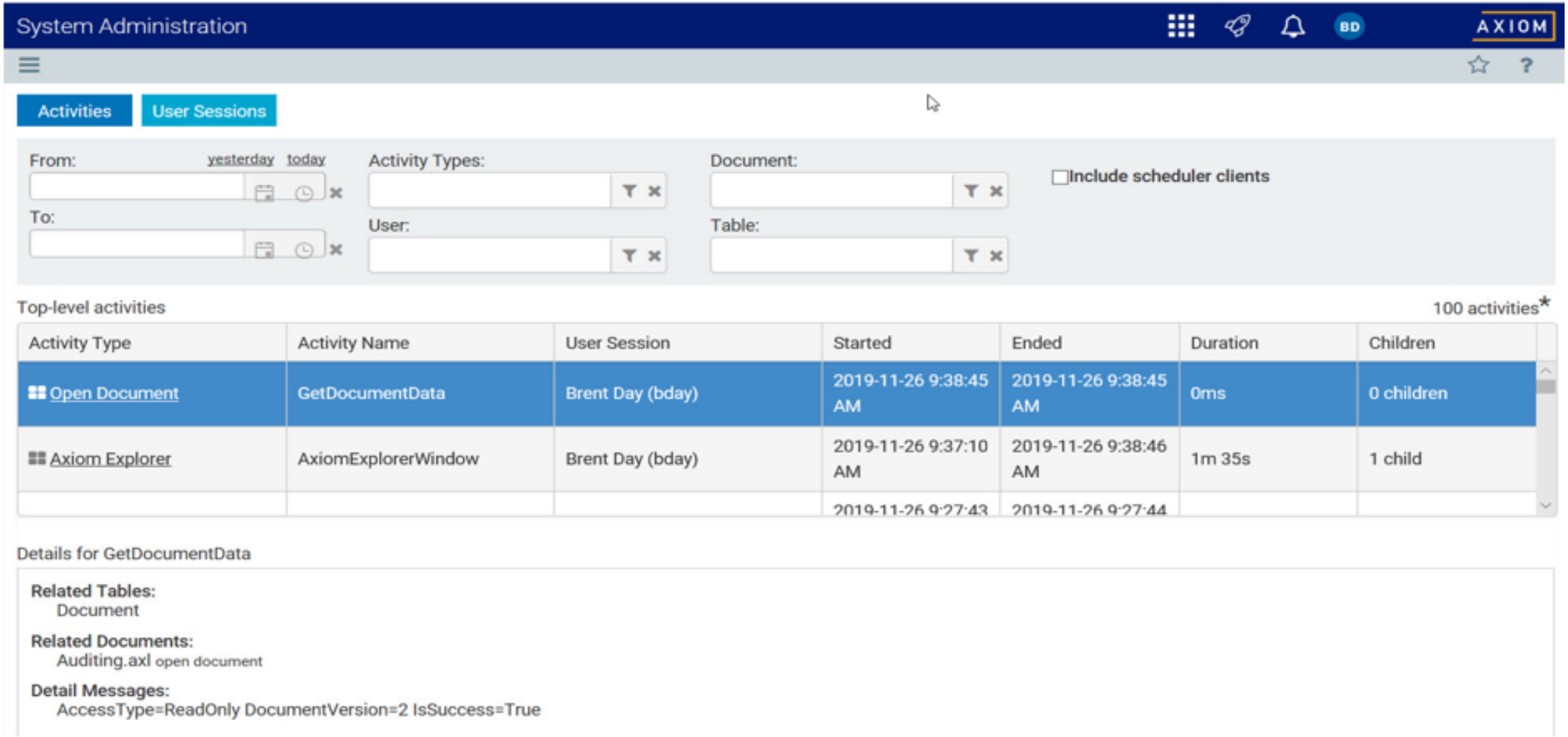
How to use the Audit Manager



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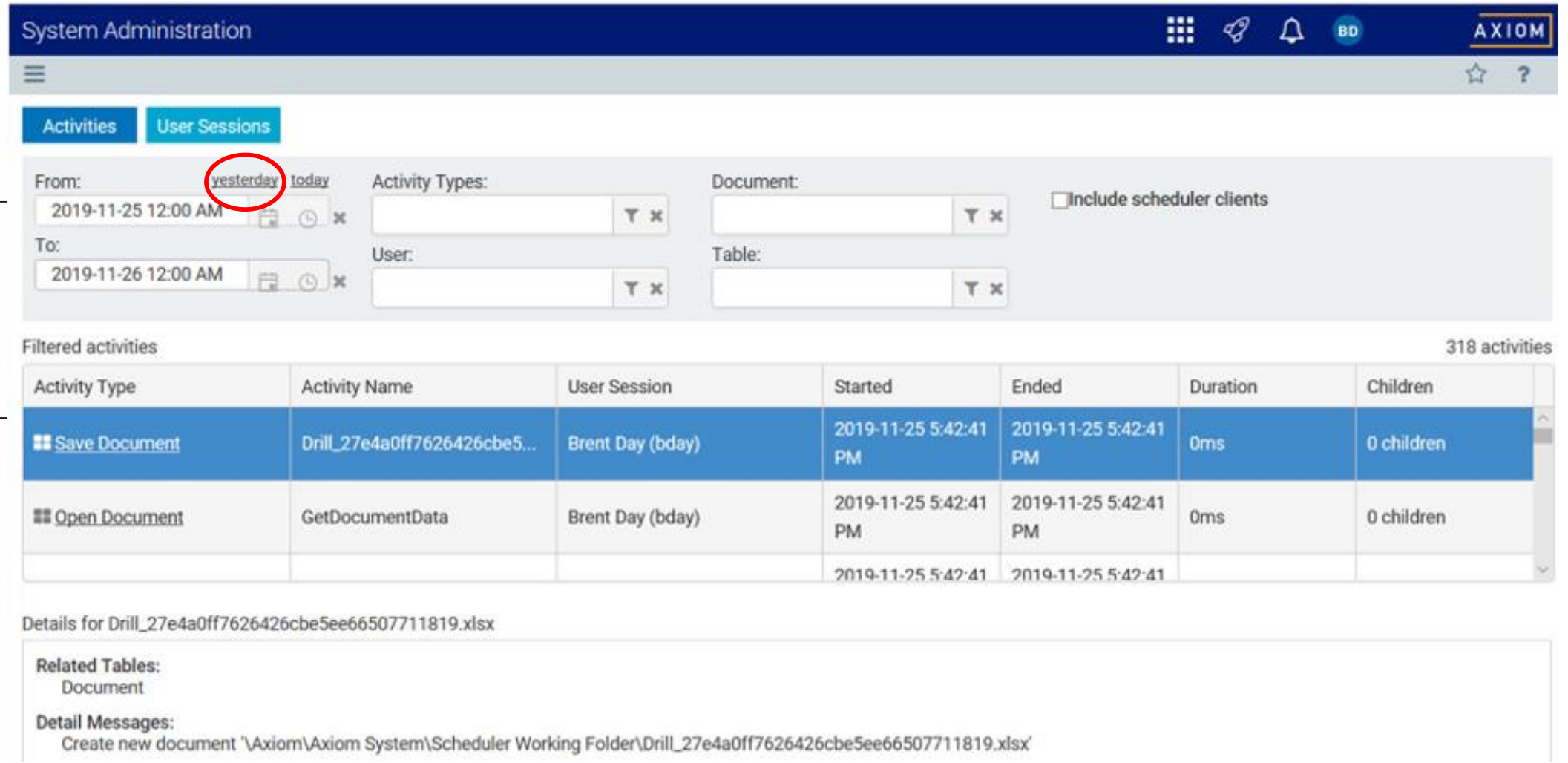
How to use the Audit Manager

Select date range – this example uses yesterday's date (use the yesterday hyperlink)



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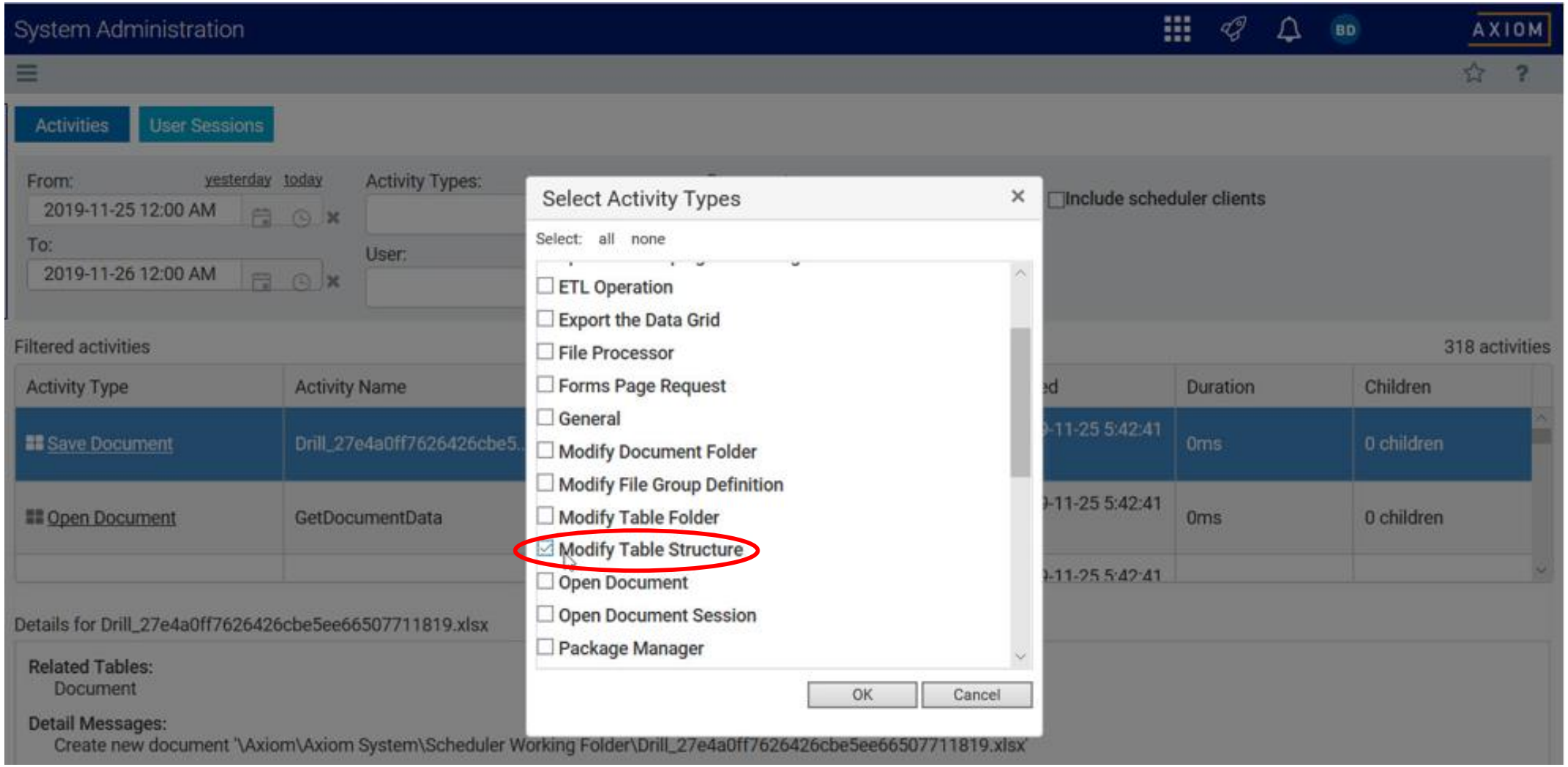
How to use the Audit Manager

Next select the desired Activity Type – this case uses the Modify Table Structure



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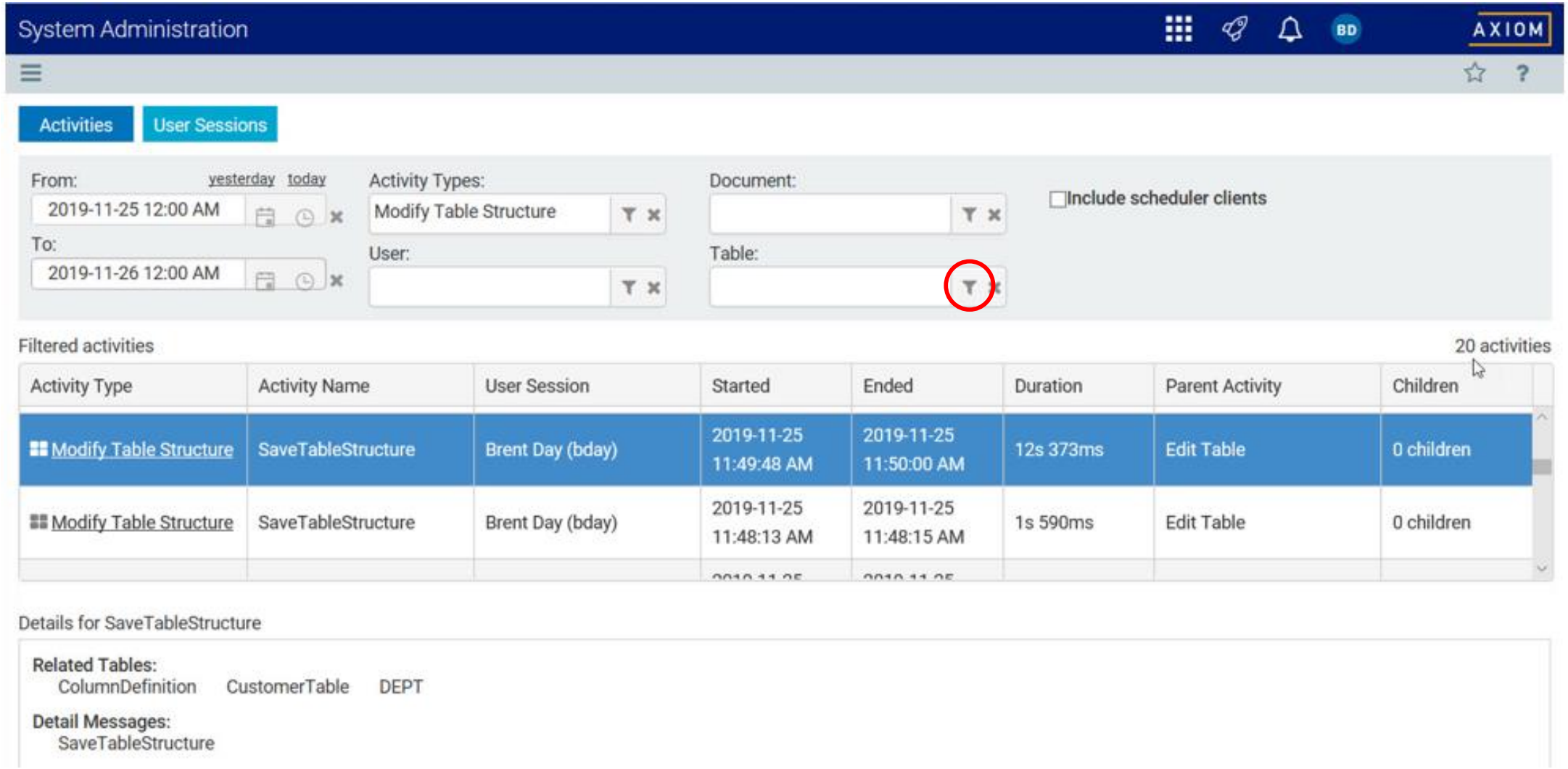
How to use the Audit Manager

Next click on the funnel filter icon in the Table selection



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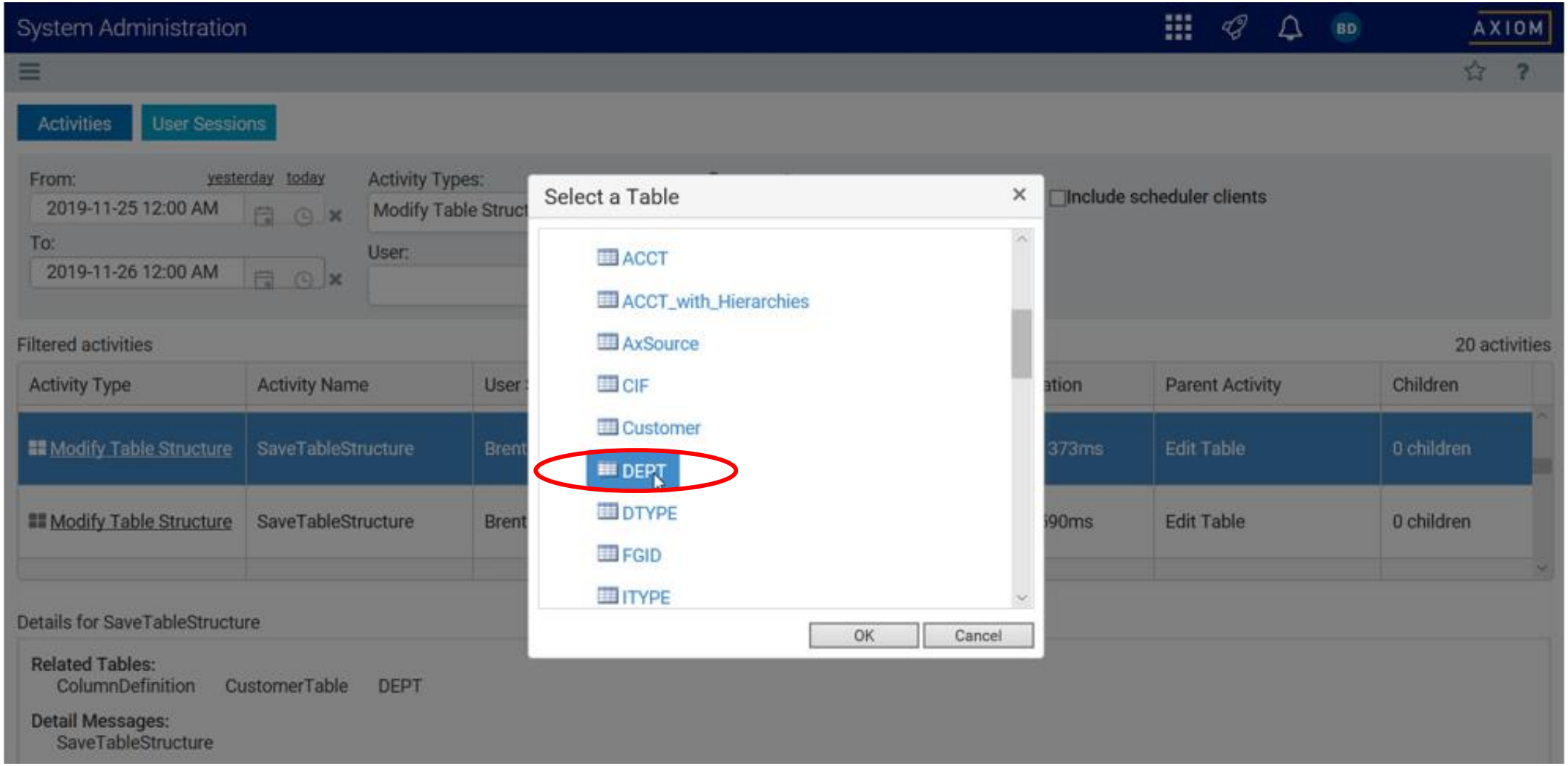
How to use the Audit Manager

This example uses the DEPT table



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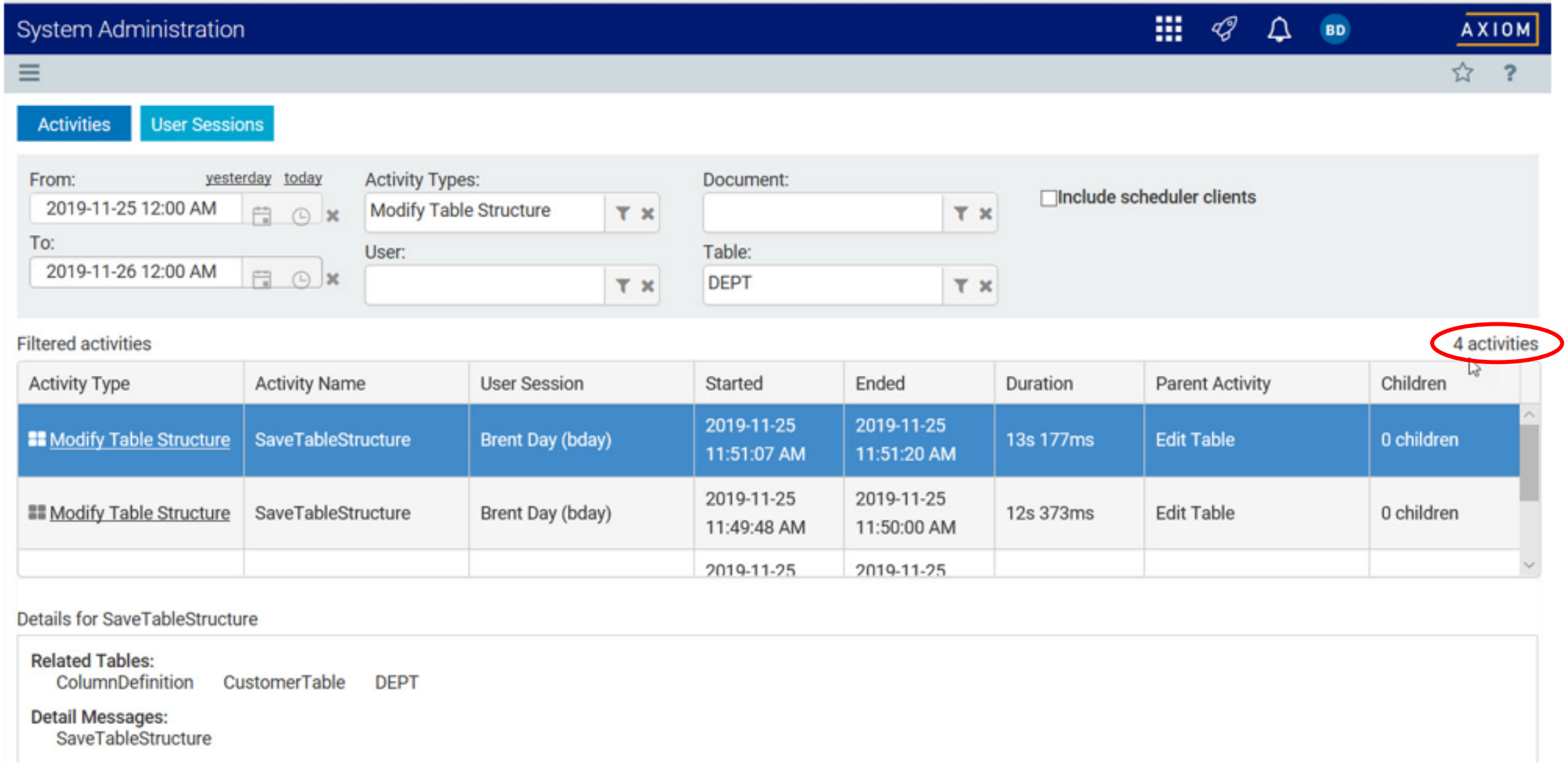
How to use the Audit Manager

The results show that there were 4 activities that modified the table structure of the DEPT table yesterday. They can each be investigated to see what happened during each of those sessions and by whom.



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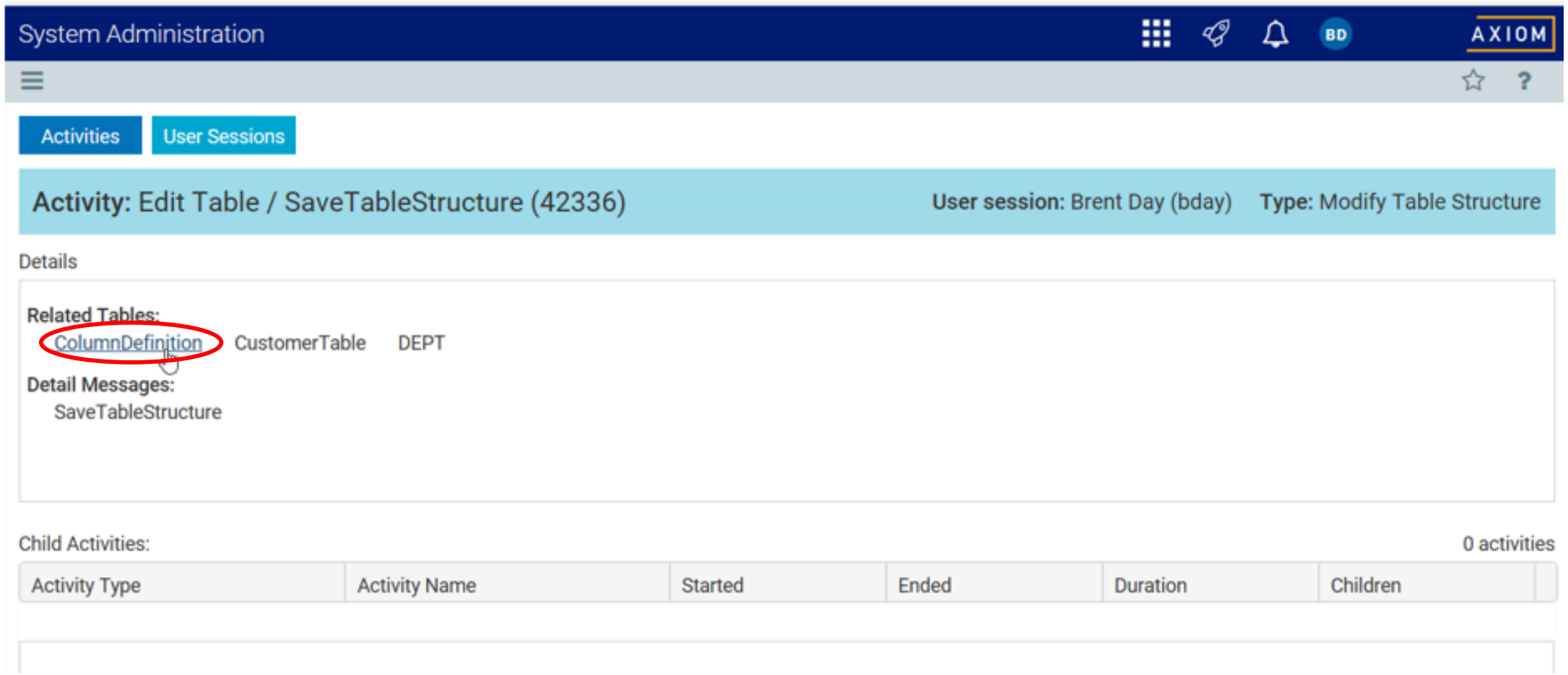
How to use the Audit Manager

Click on the ColumnDefinition hyperlink to see the detail of what change was made to the column definitions for the DEPT table.



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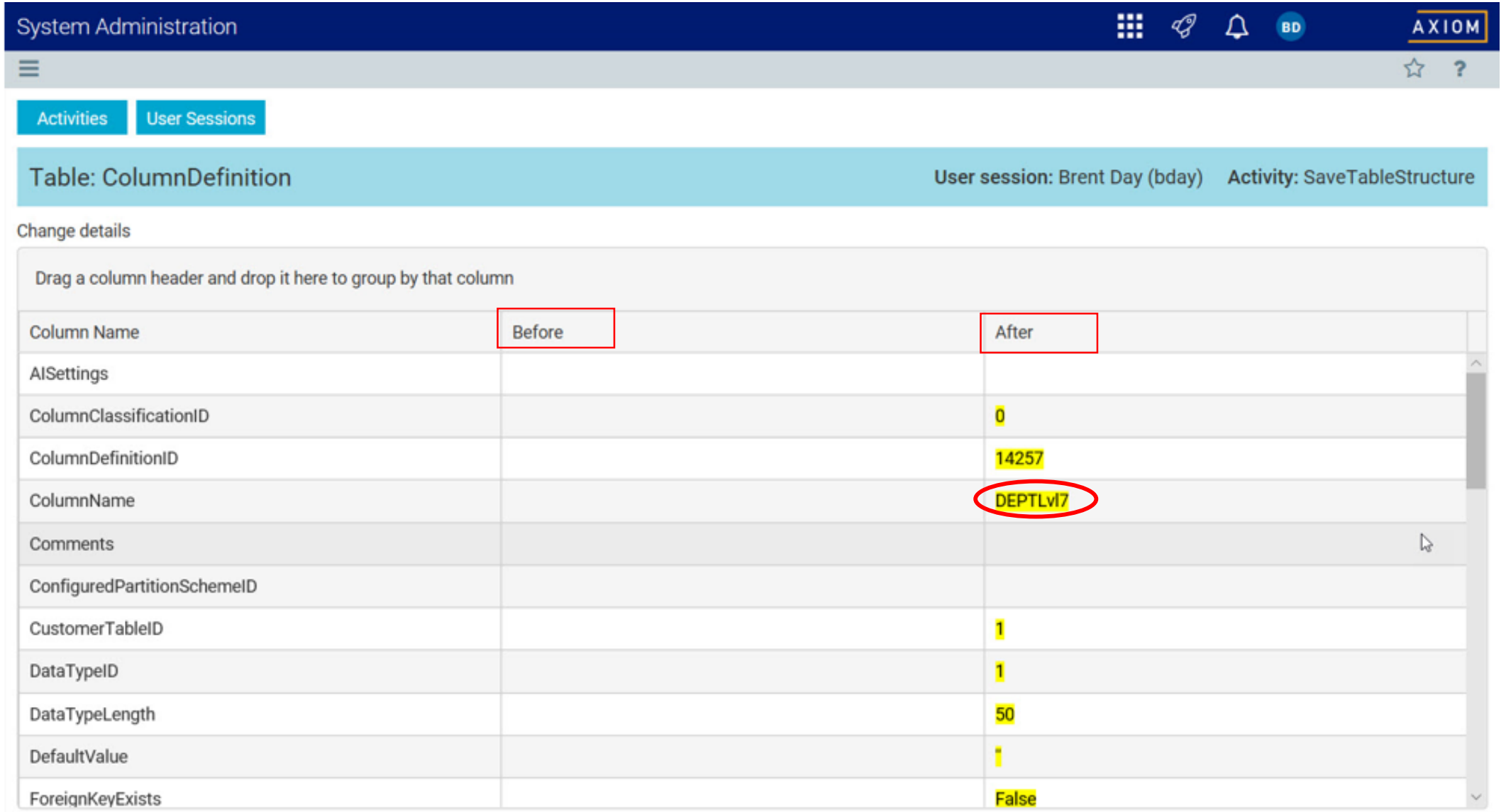
How to use the Audit Manager

This shows that a new string column of 50 characters in length and entitled DEPTLvl7 was added to the DEPT table



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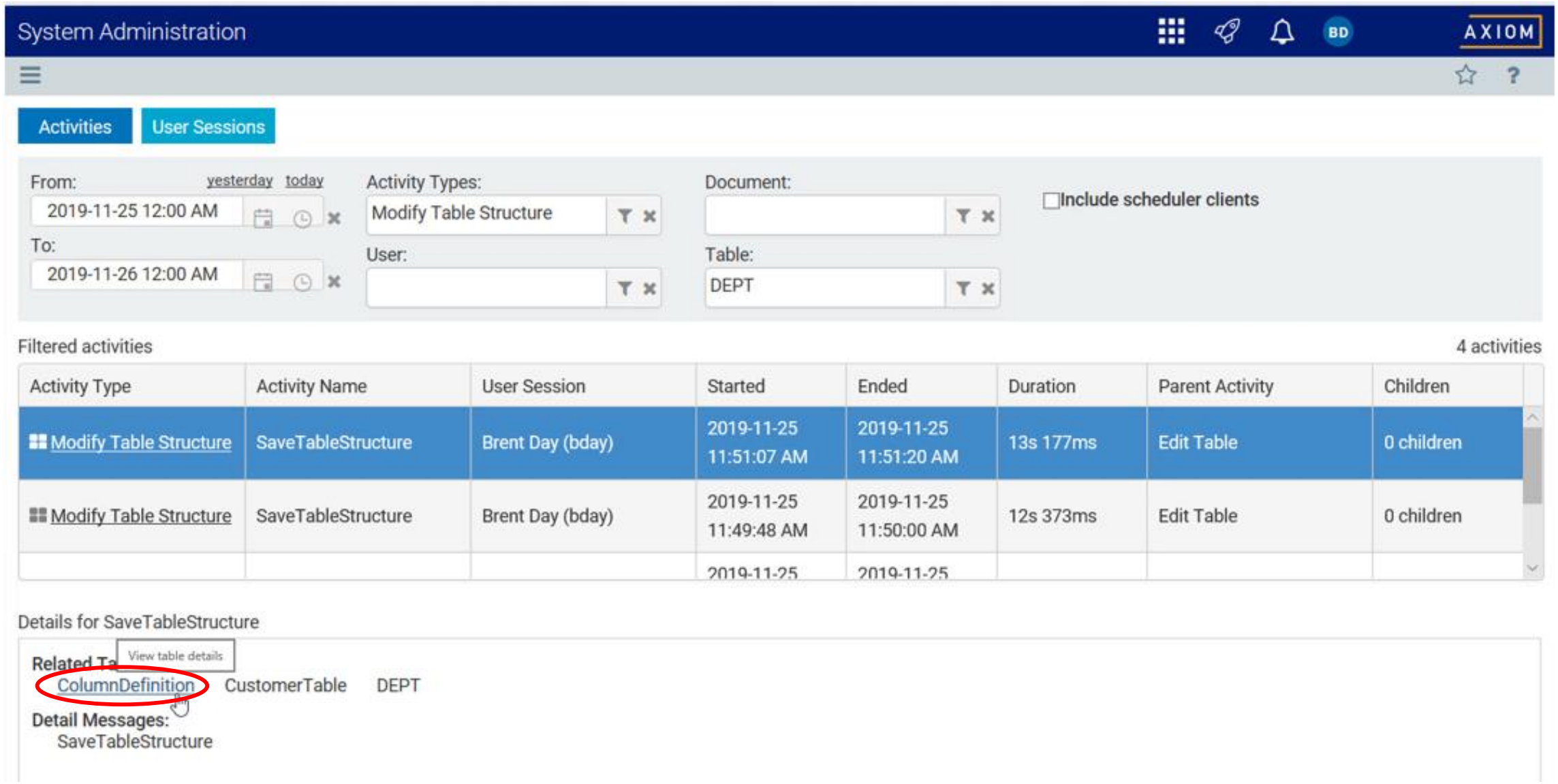
How to use the Audit Manager



The same detail screen can be opened by clicking this link.

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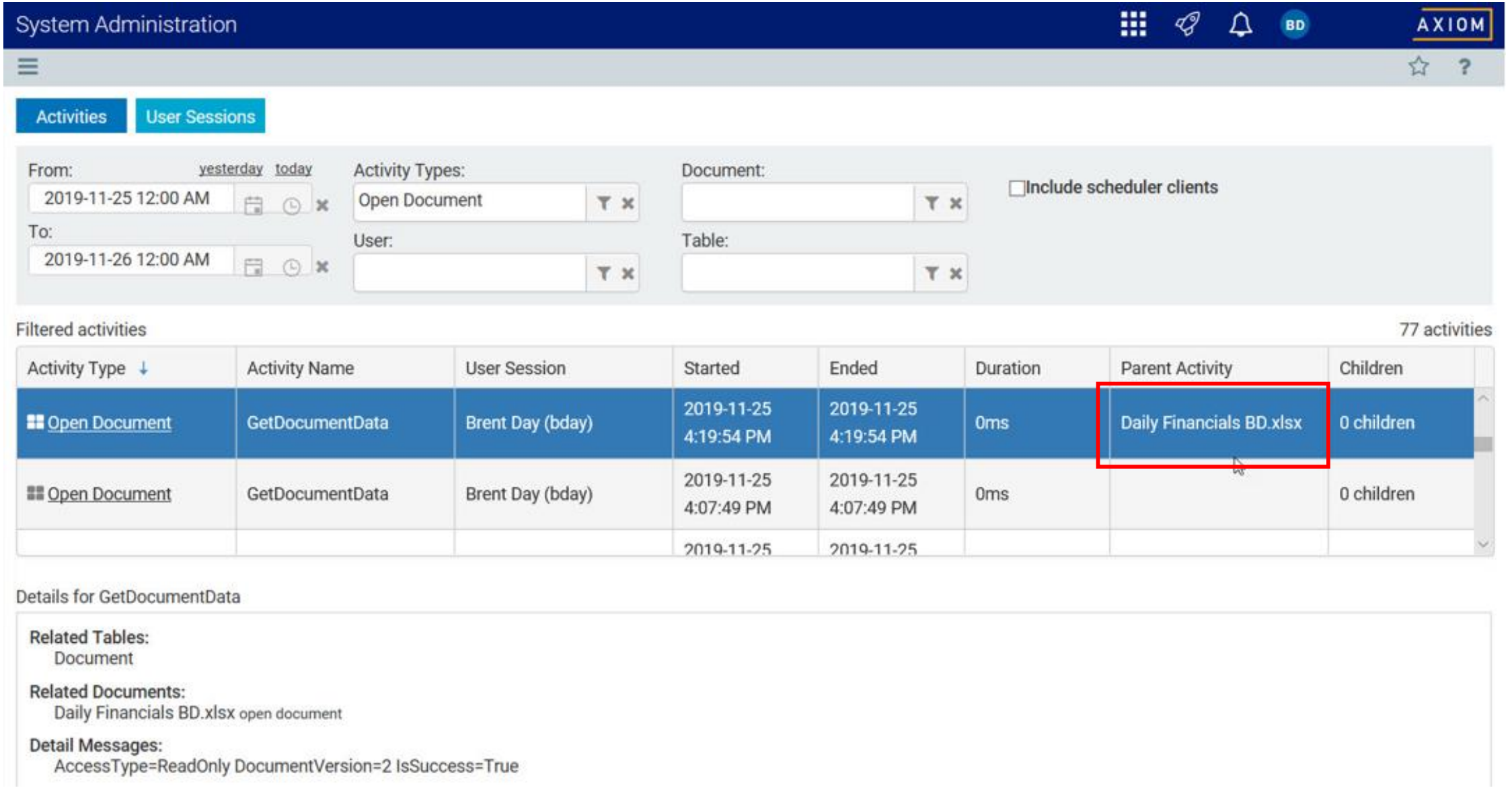
How to use the Audit Manager

This example is looking at what happened when user (bday) opened the Daily Financials BD.xlsx report



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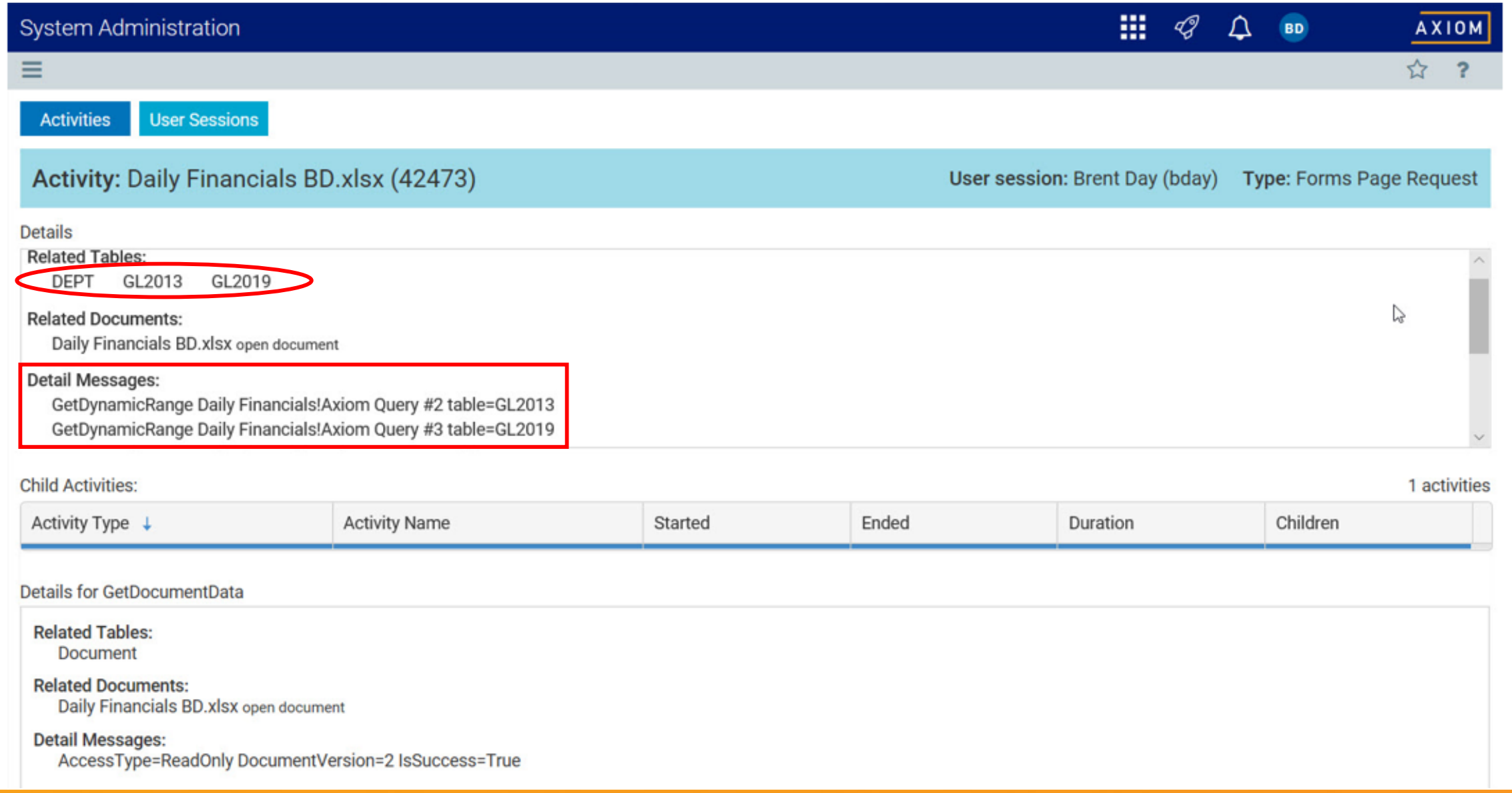
How to use the Audit Manager

The details indicate what tables were queried and the detail messages show which queries were executed



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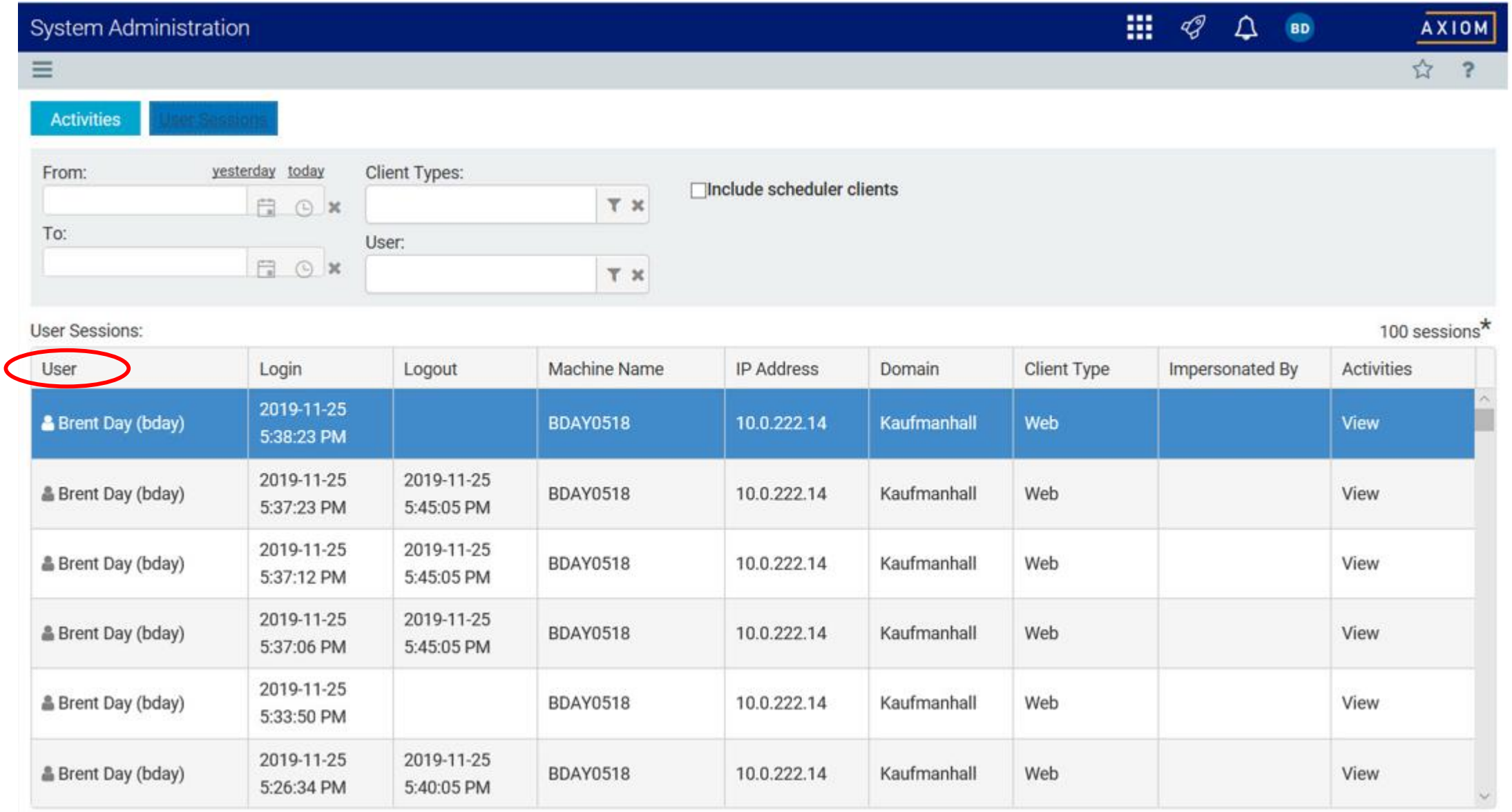
How to use the Audit Manager

By clicking on the User Sessions button a listing of sessions for a particular user will be returned for evaluation or analysis



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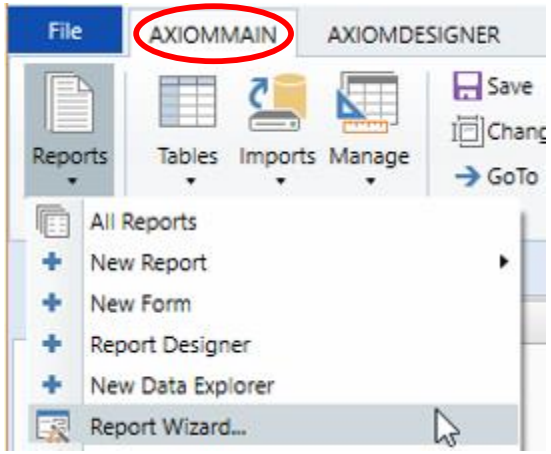
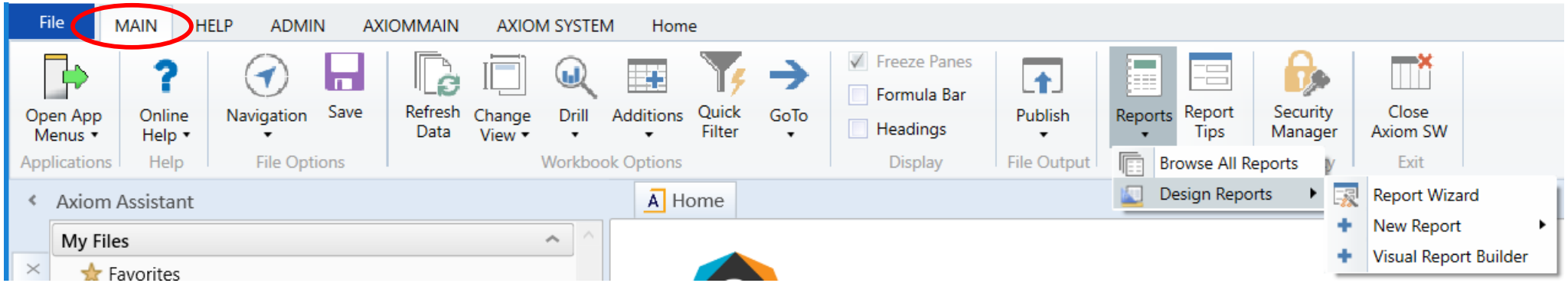
OTHER AUDIT REPORTING – REPORT WIZARD

Open the Report Wizard from the Reports menu dropdown

AXIOM Main | Reports | Report Wizard



MAIN | Reports | Design Reports | Report Wizard



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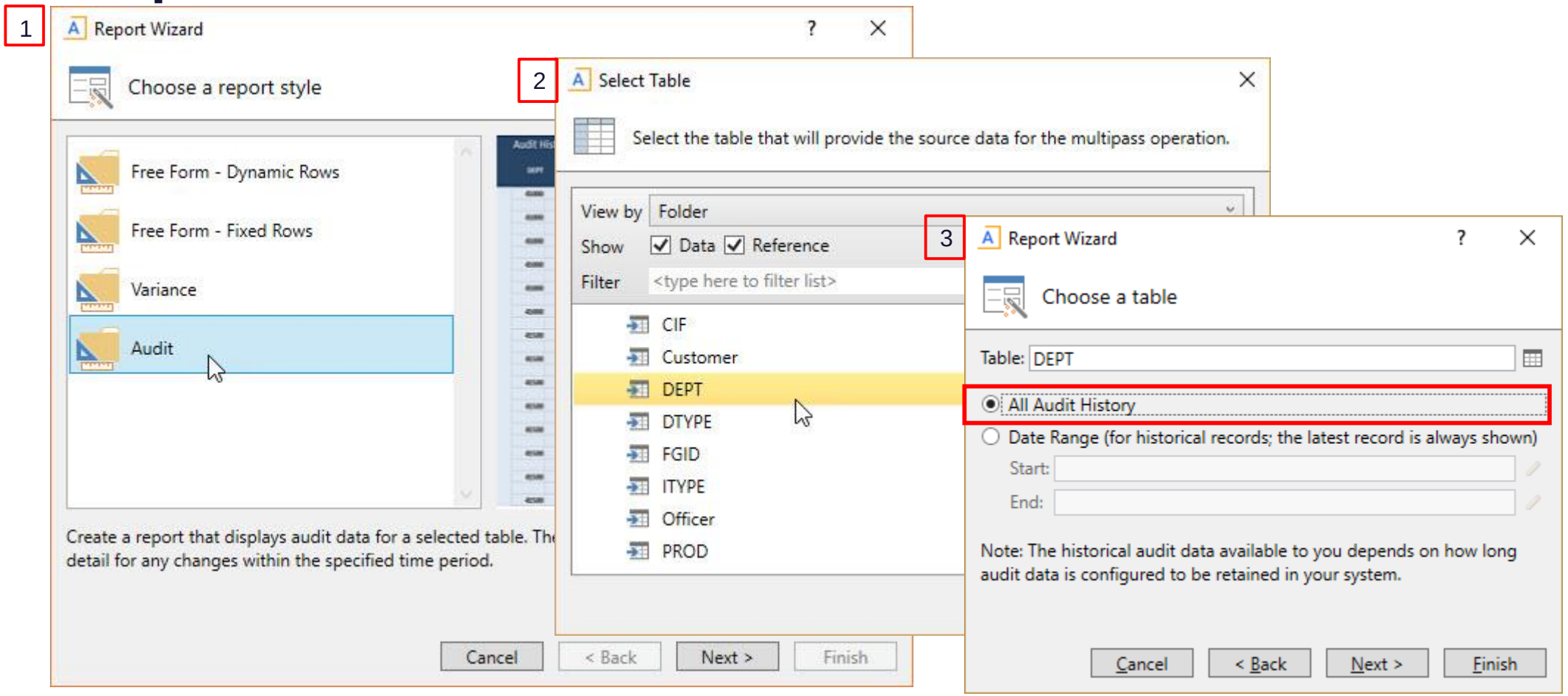
Report Wizard



1) Select Audit as the report style
2) Then select DEPT for the Table to report on
3) Next select the time frame you are investigating (this example uses All Audit History)

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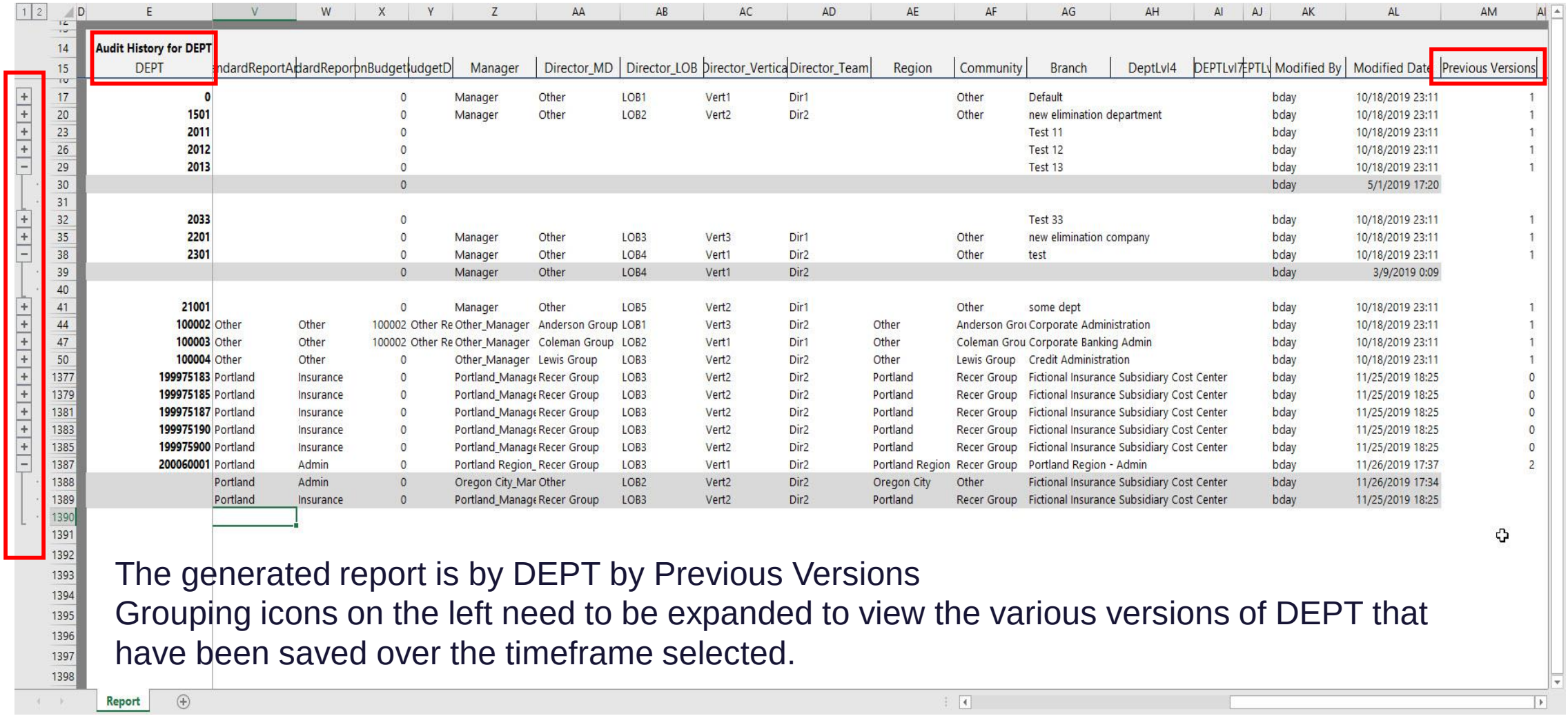
Report Wizard



Audit History for DEPT																			
DEPT	ndardReportA	dardReport	nBudget	udgetD	Manager	Director_MD	Director_LOB	Director_Vertica	Director_Team	Region	Community	Branch	DeptLvl4	DEPTLvl7	EPTLv	Modified By	Modified Date	Previous Versions	
0			0		Manager	Other	LOB1	Vert1	Dir1		Other	Default				bday	10/18/2019 23:11	1	
1501			0		Manager	Other	LOB2	Vert2	Dir2		Other	new elimination department				bday	10/18/2019 23:11	1	
2011			0									Test 11				bday	10/18/2019 23:11	1	
2012			0									Test 12				bday	10/18/2019 23:11	1	
2013			0									Test 13				bday	10/18/2019 23:11	1	
			0													bday	5/1/2019 17:20		
2033			0									Test 33				bday	10/18/2019 23:11	1	
2201			0		Manager	Other	LOB3	Vert3	Dir1		Other	new elimination company				bday	10/18/2019 23:11	1	
2301			0		Manager	Other	LOB4	Vert1	Dir2		Other	test				bday	10/18/2019 23:11	1	
			0		Manager	Other	LOB4	Vert1	Dir2							bday	3/9/2019 0:09		
21001			0		Manager	Other	LOB5	Vert2	Dir1		Other	some dept				bday	10/18/2019 23:11	1	
100002	Other	Other	100002	Other Re	Other_Manager	Anderson Group	LOB1	Vert3	Dir2	Other	Anderson Grou	Corporate Administration				bday	10/18/2019 23:11	1	
100003	Other	Other	100002	Other Re	Other_Manager	Coleman Group	LOB2	Vert1	Dir1	Other	Coleman Grou	Corporate Banking Admin				bday	10/18/2019 23:11	1	
100004	Other	Other	0		Other_Manager	Lewis Group	LOB3	Vert2	Dir2	Other	Lewis Group	Credit Administration				bday	10/18/2019 23:11	1	
199975183	Portland	Insurance	0		Portland_Manage	Recer Group	LOB3	Vert2	Dir2	Portland	Recer Group	Fictional Insurance Subsidiary Cost Center				bday	11/25/2019 18:25	0	
199975185	Portland	Insurance	0		Portland_Manage	Recer Group	LOB3	Vert2	Dir2	Portland	Recer Group	Fictional Insurance Subsidiary Cost Center				bday	11/25/2019 18:25	0	
199975187	Portland	Insurance	0		Portland_Manage	Recer Group	LOB3	Vert2	Dir2	Portland	Recer Group	Fictional Insurance Subsidiary Cost Center				bday	11/25/2019 18:25	0	
199975190	Portland	Insurance	0		Portland_Manage	Recer Group	LOB3	Vert2	Dir2	Portland	Recer Group	Fictional Insurance Subsidiary Cost Center				bday	11/25/2019 18:25	0	
199975900	Portland	Insurance	0		Portland_Manage	Recer Group	LOB3	Vert2	Dir2	Portland	Recer Group	Fictional Insurance Subsidiary Cost Center				bday	11/25/2019 18:25	0	
200060001	Portland	Admin	0		Portland Region_	Recer Group	LOB3	Vert1	Dir2	Portland Region	Recer Group	Portland Region - Admin				bday	11/26/2019 17:37	2	
	Portland	Admin	0		Oregon City_Mar	Other	LOB2	Vert2	Dir2	Oregon City	Other	Fictional Insurance Subsidiary Cost Center				bday	11/26/2019 17:34		
	Portland	Insurance	0		Portland_Manage	Recer Group	LOB3	Vert2	Dir2	Portland	Recer Group	Fictional Insurance Subsidiary Cost Center				bday	11/25/2019 18:25		

The generated report is by DEPT by Previous Versions
Grouping icons on the left need to be expanded to view the various versions of DEPT that have been saved over the timeframe selected.

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Common import data errors

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COMMON IMPORT DATA ERRORS

- Incorrect data format/DataType
- Incorrect column mapping
- Duplicate records

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INCORRECT DATA FORMAT / DATATYPE

Case 1 – Incorrect datatype

Issue: Import is using older Decimal datatype and source data file was created using more current Numeric datatype

Troubleshooting Steps:

Need to change the datatype for this field in the Mapping tab of the import from Decimal to Numeric.

Note: Axiom still offers Decimal datatype for backwards compatibility.

Please use Numeric or Integer in the future

- Integer does not have decimals
- Numeric has decimals

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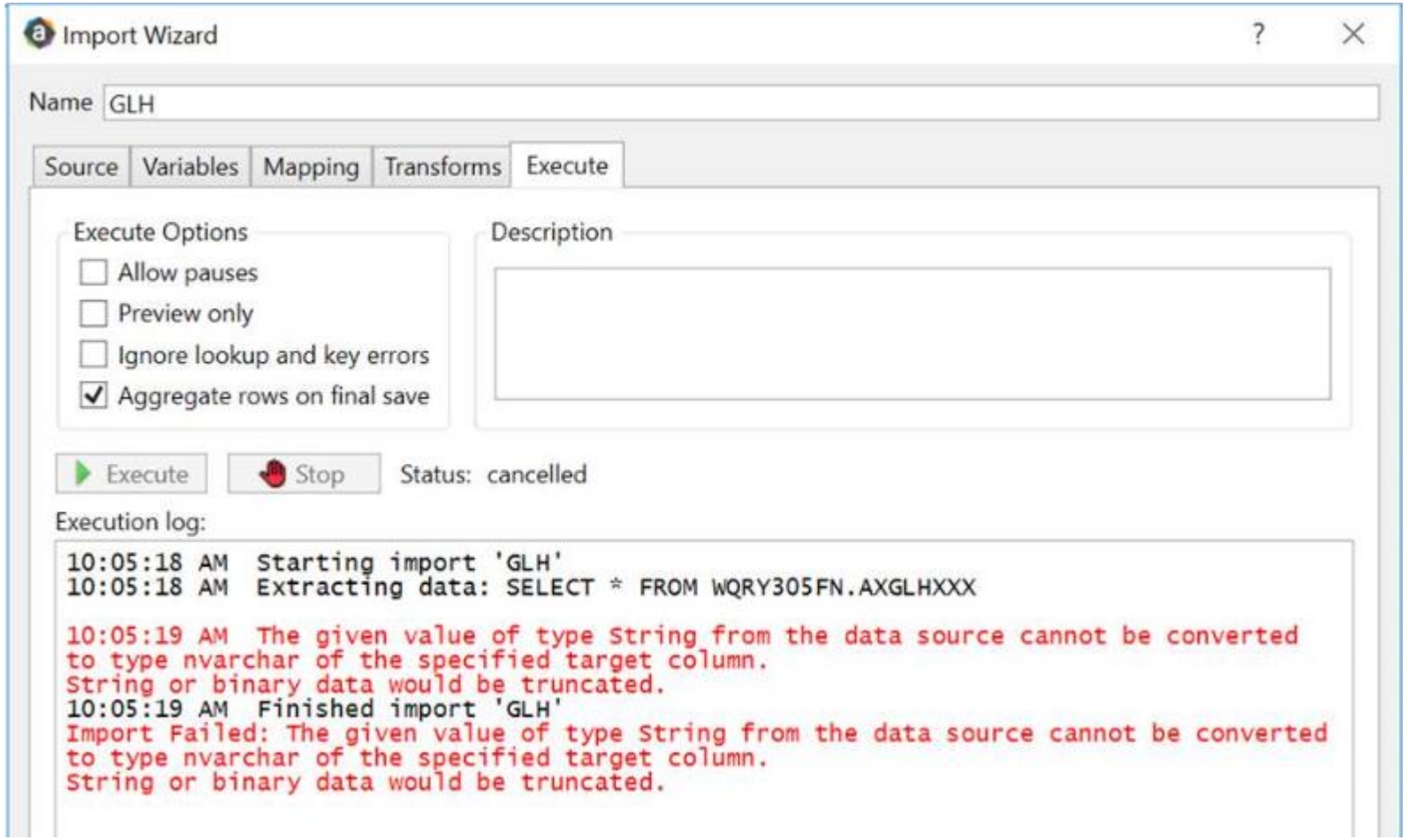
INCORRECT DATA FORMAT / DATATYPE

Case 2 – Error Message not very specific



Issue: Error message not very specific.

Troubleshooting steps:

1) Open the source file in Excel or Notepad and take a cursory look at the data to see if there is anything obvious that stands out
   -Alpha data in numeric column
   -Special characters

2) Create a backup of the source file, then edit the source file and start by eliminating half of the rows from the file and try running the import again.
   - If it errors again, then repeat eliminating rows until you can isolate the erroneous record.

3) Delete bad record from full data set and re-run to see if there might be other erroneous records

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INCORRECT DATA FORMAT / DATATYPE

Case 3 – Again not a very informative error message

Good Afternoon,

We need assistance reconciling an import error for our depreciation expense into our annual budget. Current status of the job is "canceled". The following is the execution log:

2:55:36 PM Starting import 'Budget Depreciation Expense'
2:55:38 PM Extracting data: F:\Budget & Reforecast\2020 Budget\Import Files\Depreciation 60 months CC.csv
2:55:39 PM Imported data into dbo.tmp135_39031
2:55:39 PM Running transforms...
2:55:39 PM Transform 1: Select * From dbo.tmp135_39031
2:55:39 PM Transform 2: Update dbo.tmp135_39031 Set Dept = Company_Id * 10000 + Cost_Center
2:55:39 PM Transform 3: Update dbo.tmp135_39031 Set DType = 'MTD'
2:55:39 PM Transform 4: Update dbo.tmp135_39031 Set AxSRCID = 5
2:55:39 PM Transform 5: Update dbo.tmp135_39031 Set FGID = 11
2:55:40 PM Transform 6: Update dbo.tmp135_39031 Set Detail = Cast(Asset_ID AS NVARCHAR) + '_' + Asset_Name
2:55:40 PM Transform 7: Update dbo.tmp135_39031 Set AX_CustomZeroTag = 'Budget Depreciation Expense Import'
2:55:40 PM Transform 8: Update dbo.tmp135_39031 Set Desc_1=Right(Desc_1,7)Update dbo.tmp135_39031 Set Month = Left(Desc_1,2)Update dbo.tmp135_39031 Set Year = Right(Desc_1,4)
2:55:40 PM Transform 9: Select Month From dbo.tmp135_39031
2:55:40 PM Transform 10: Update dbo.tmp135_39031 Set Monthly_Amt = net_depr_basis/useful_life_months
2:55:40 PM Failed to execute SQL: Update dbo.tmp135_39031 Set Monthly_Amt = net_depr_basis/useful_life_monthsDivide by zero error encountered.The statement has been terminated.
2:55:40 PM Dropping temporary table dbo.tmp135_39031 ...
2:55:40 PM Finished import 'Budget Depreciation Expense'
Import Failed: Failed to execute SQL: Update dbo.tmp135_39031 Set Monthly_Amt = net_depr_basis/useful_life_monthsDivide by zero error encountered.The statement has been terminated.

Issue: No specifics regarding erroneous record

Troubleshooting steps:

1) Open source file and try to locate record with a zero value in the “useful_life_months” field – no record exists
2) Make a backup of source file and remove half of the records from the file and re-run the import and repeat until erroneous record is isolated.
   - In this case, it ended up being a blank row at the bottom of the file, Axiom brought in zeros for all fields for that row which triggered the divide by zero error.

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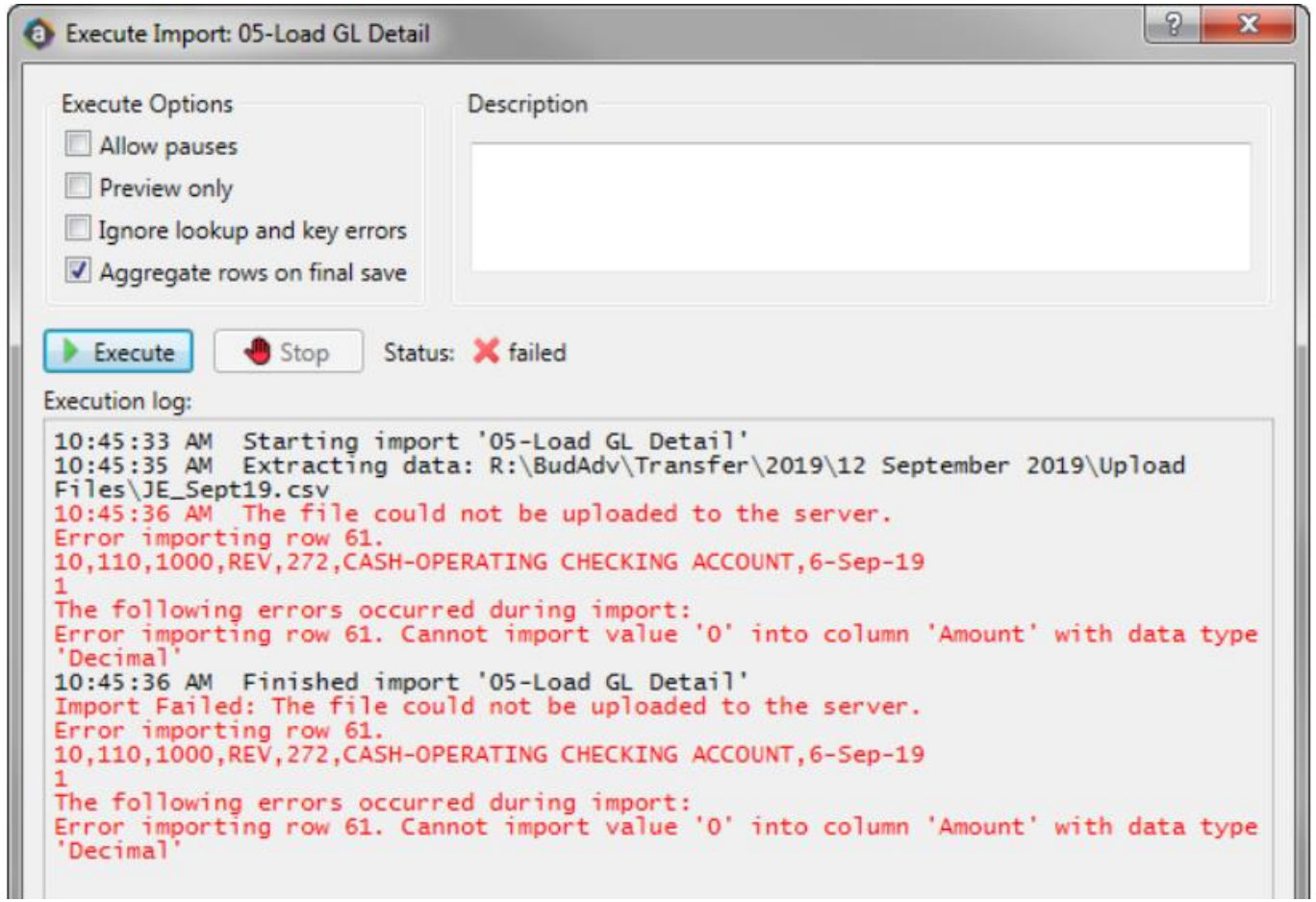
INCORRECT COLUMN MAPPING



Issue: Existing import stopped working after some changes on the source system.

Troubleshooting steps:

1) Look at row 61 of the data to determine if it is bad data in the field

2) Look at the source data file and compare it to the mapping tab of the import

3) Determined that the source data fields had changed order.
   - Columns 5 and 6 had been switched.
   - It ended up being easier to swap columns 5 and 6 in the mapping tab to accommodate the change rather than trying to get the issue fixed coming from the source system.

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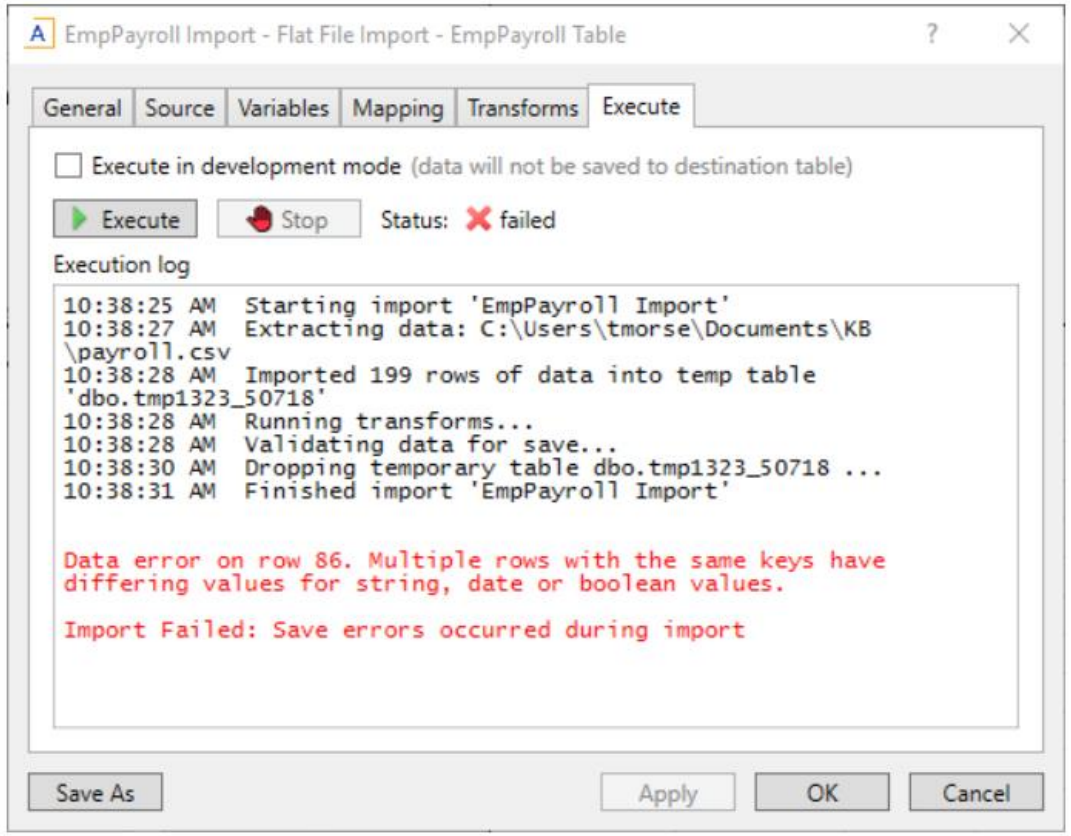
DUPLICATE RECORDS



Issue: Error indicates that multiple rows have the same keys with differing values for non numeric fields

Troubleshooting steps:

1) Open data file in MS Excel and look at record #86

2) Search file for other records with the same key values (may need to take a look at the target table to identify which fields are key fields) by filtering data for the key field values

3) Determine what is different between the records with the matching keys and investigate why they are different.

4) The appropriate action varies depending upon what is wrong with the duplicate data:
   - correct in the source system; create a new file
   - a change may need to be made to the transformation steps
   - a change may need to be made to other Axiom tables to deal with the issue.

5) See Help article KB1012 – Identify duplicate records in an import using the temp table

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Common issues with scheduled imports and results

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Common issues with scheduled imports and results

- Accessing Job results as a non-admin / admin user
- Viewing details of import results in scheduler
- Source file path error
- Index maintenance error
- Multiple jobs scheduled to run at the same time

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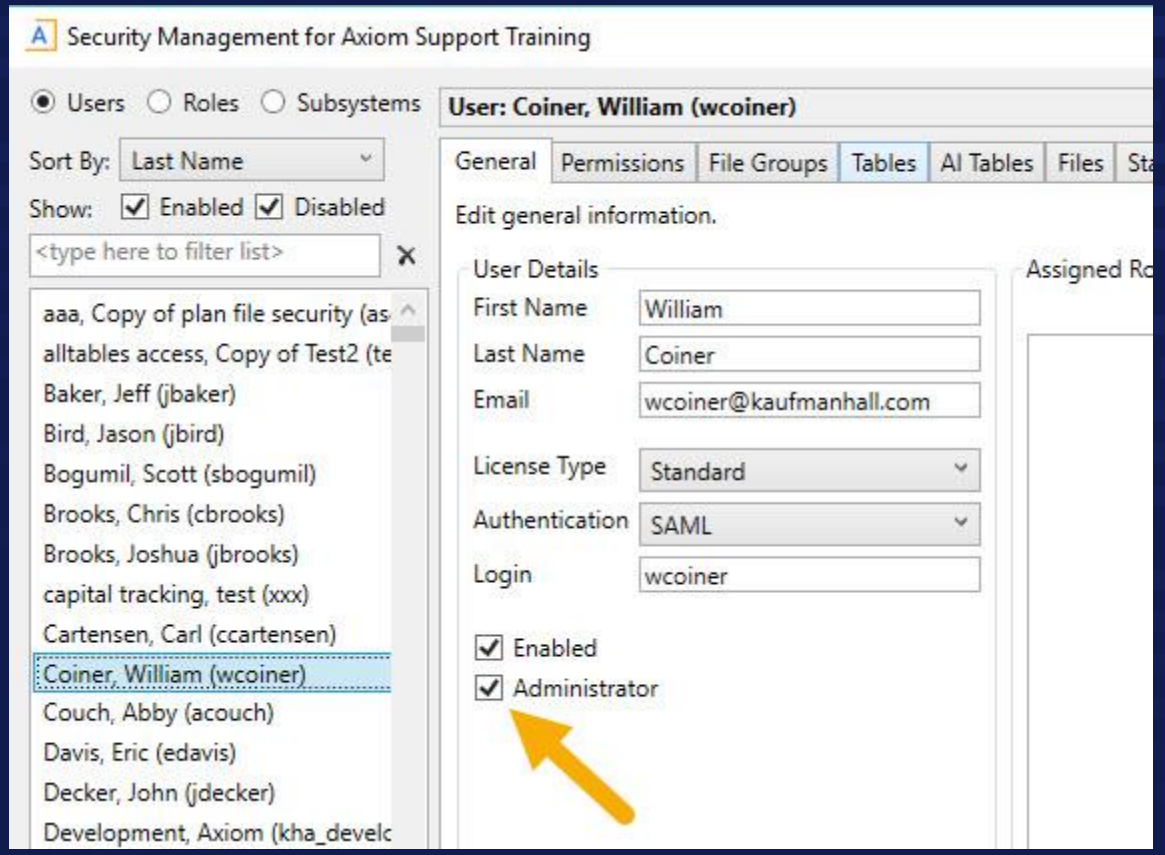
ACCESSING JOB RESULTS AS A NON-ADMIN / ADMIN USER

- Non-admin users will only be able to view the job results of jobs they execute
- If a non-admin user needs to manage a scheduled job, they should set it up and schedule it to run. The job will then be tied to their user record.
- If a user needs to manage all scheduled imports, they should be made an Administrator in Security Manager



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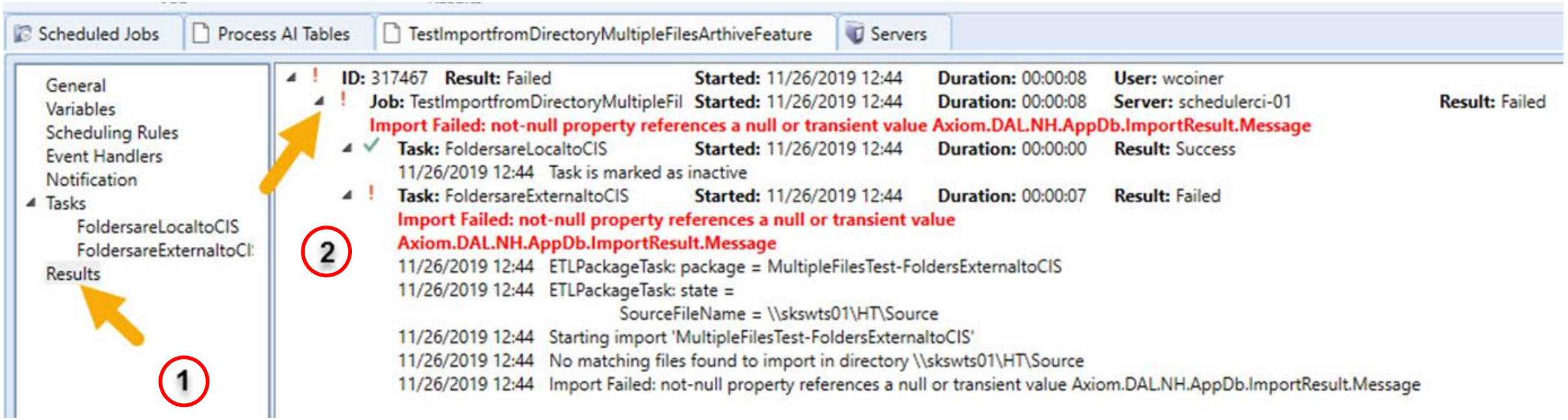
VIEWING DETAILS OF AN IMPORT JOB

1) To access the job result details double click on the job under Scheduled jobs and click on **Results**

2) From here you can expand out the instance of a job that has ran and can continue to drill down to the detail level, which will provide any error messages and how many records were inserted during the import

- This can be done for each task within a job



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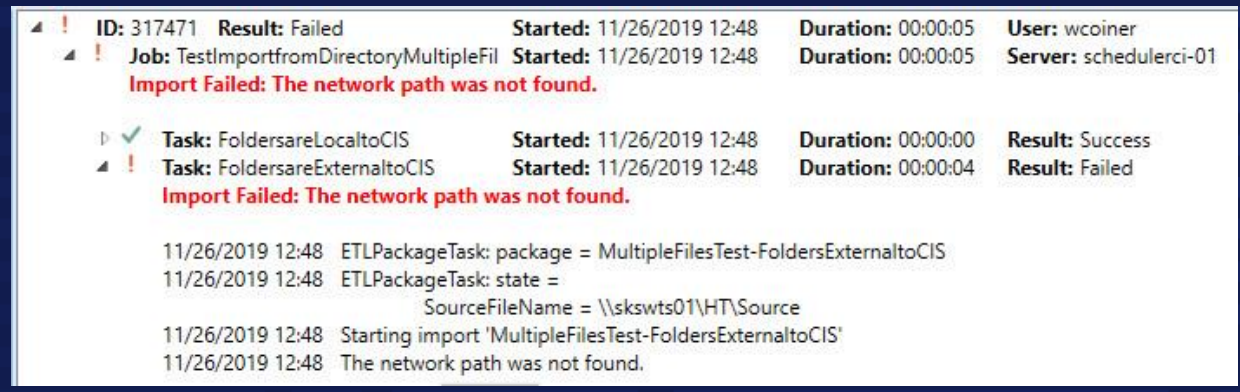
SOURCE FILE PATH ERRORS



- The file <path> is not accessible to the Axiom application server <server name>
- Import Failed: The network path was not found
  - When running import via scheduler, the local drive is not by default accessible by cloud services
  - The Cloud Integration Service (CIS) enables the connection between the cloud services and your local shared drive
  - Enable the Remote Data Connection in the import file and select your CIS

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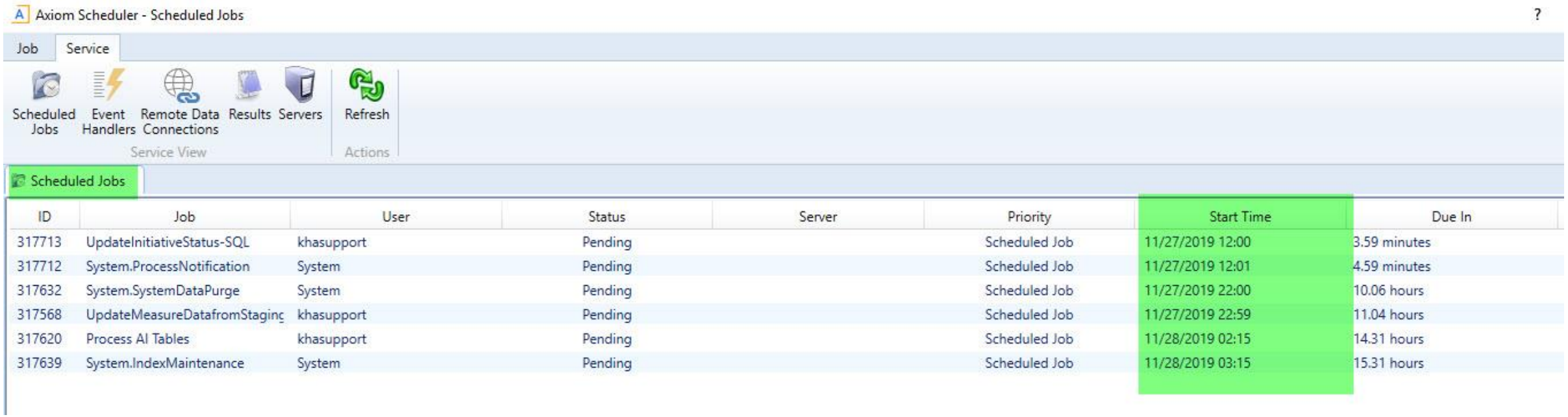
INDEX MAINTENANCE ERROR

- If jobs are scheduled to run before index maintenance job runs you may receive the following error: “**Import failed. Index Maintenance Job needs to be run**.”
  - Some change has occurred in the database that requires an update to the indexes before inserting any new data
  - Recommend scheduling overnight imports to run **AFTER** the index maintenance job typically finishes



ID	Job	User	Status	Server	Priority	Start Time	Due In
317713	UpdateInitiativeStatus-SQL	khasupport	Pending		Scheduled Job	11/27/2019 12:00	3.59 minutes
317712	System.ProcessNotification	System	Pending		Scheduled Job	11/27/2019 12:01	4.59 minutes
317632	System.SystemDataPurge	System	Pending		Scheduled Job	11/27/2019 22:00	10.06 hours
317568	UpdateMeasureDatafromStaginc	khasupport	Pending		Scheduled Job	11/27/2019 22:59	11.04 hours
317620	Process AI Tables	khasupport	Pending		Scheduled Job	11/28/2019 02:15	14.31 hours
317639	System.IndexMaintenance	System	Pending		Scheduled Job	11/28/2019 03:15	15.31 hours

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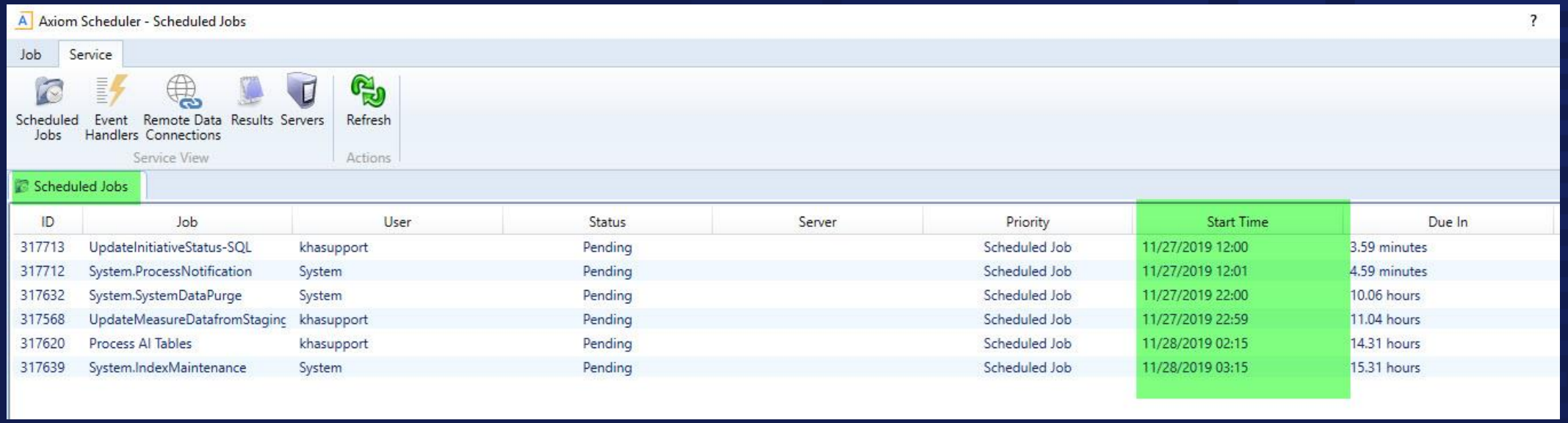
MULTIPLE JOBS SCHEDULED TO RUN AT THE SAME TIME



ID	Job	User	Status	Server	Priority	Start Time	Due In
317713	UpdateInitiativeStatus-SQL	khasupport	Pending		Scheduled Job	11/27/2019 12:00	3.59 minutes
317712	System.ProcessNotification	System	Pending		Scheduled Job	11/27/2019 12:01	4.59 minutes
317632	System.SystemDataPurge	System	Pending		Scheduled Job	11/27/2019 22:00	10.06 hours
317568	UpdateMeasureDatafromStaging	khasupport	Pending		Scheduled Job	11/27/2019 22:59	11.04 hours
317620	Process AI Tables	khasupport	Pending		Scheduled Job	11/28/2019 02:15	14.31 hours
317639	System.IndexMaintenance	System	Pending		Scheduled Job	11/28/2019 03:15	15.31 hours

- Make sure no large scheduled jobs are set to run at or close to the same time
  - This can cause jobs to stall or fail if saving to the same table(s)
  - Can also create a resource bottleneck
- Jobs like the ProcessNotification or SMTPMessage job are fine to run when other jobs are running

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Process flow and plan file security configuration

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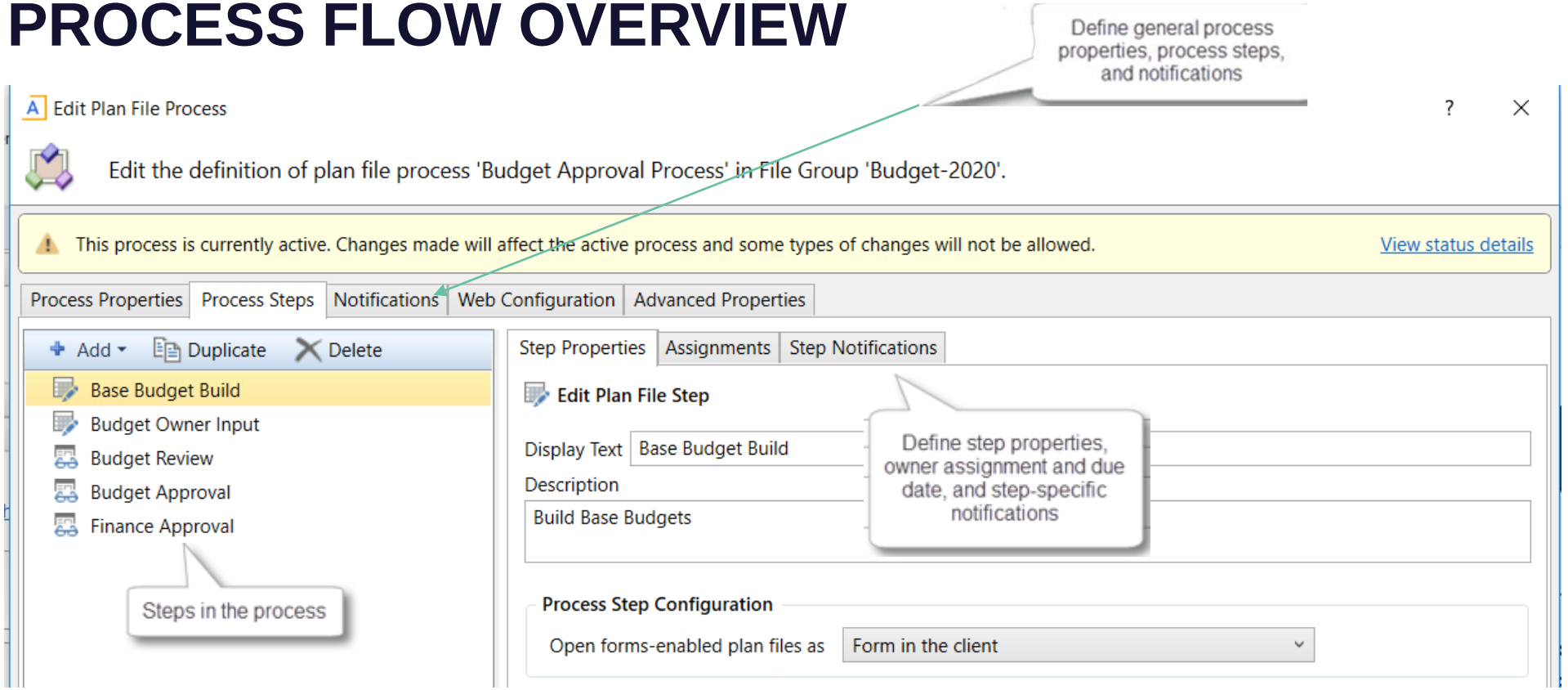
PROCESS FLOW OVERVIEW



Process Flow

- Define Process Steps
- Notifications
- Assignments
- Due Dates

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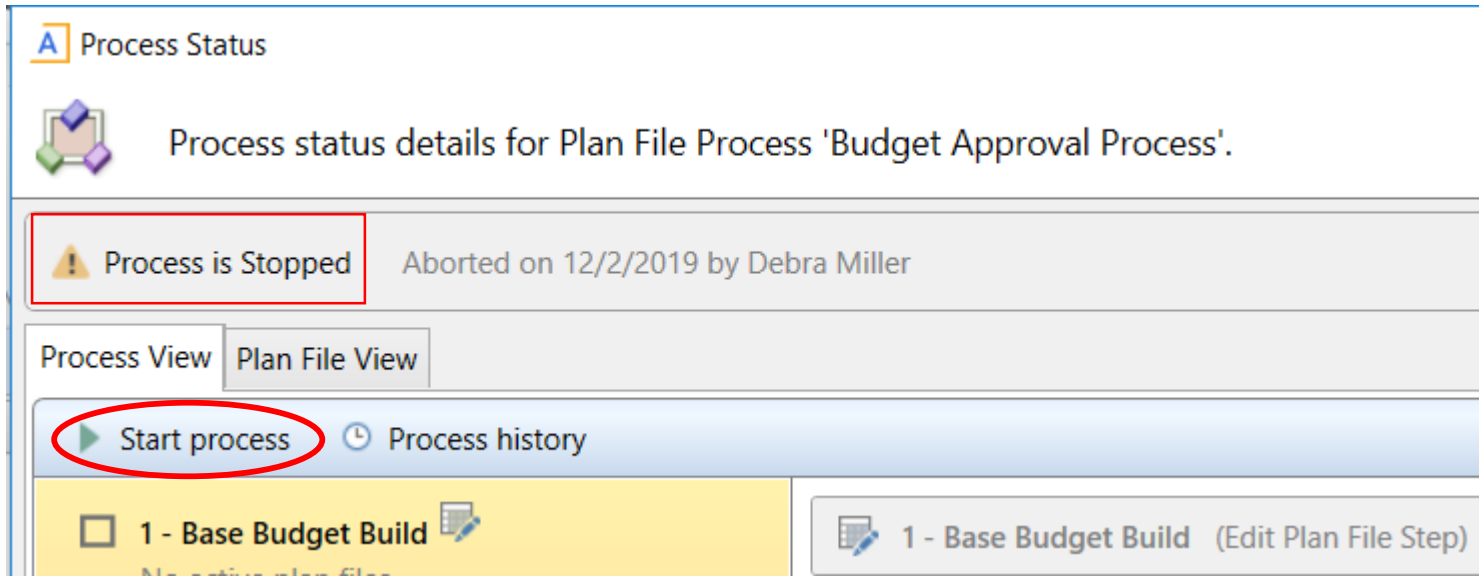
PROCESS FLOW OVERVIEW



Before releasing plan files, the process must be started

ADMIN | Process Management | Process Definitions

Select **Start process**

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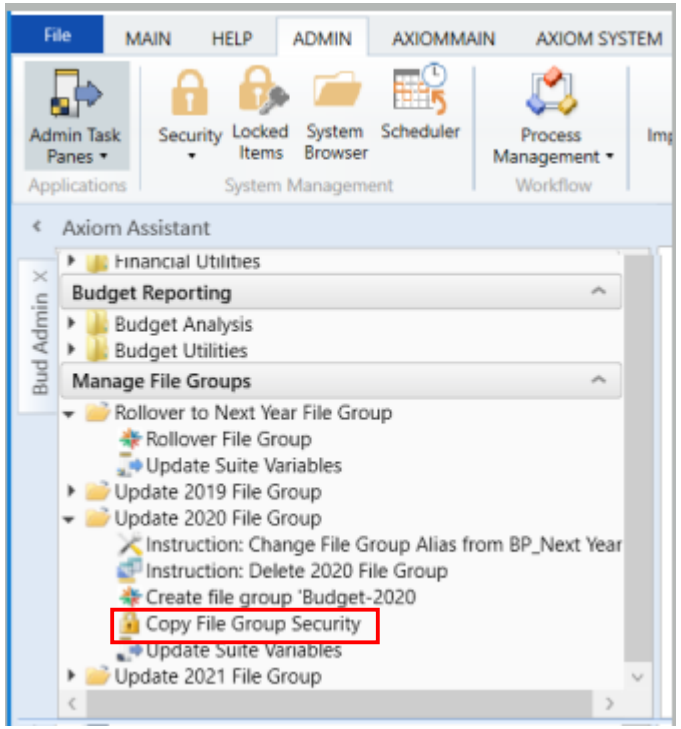
PLAN FILE SECURITY CONFIGURATION



Copy File Group Security

- This copies the security setup from the previous file group to the current active file group

- Updates to Security will only need to be made for new users

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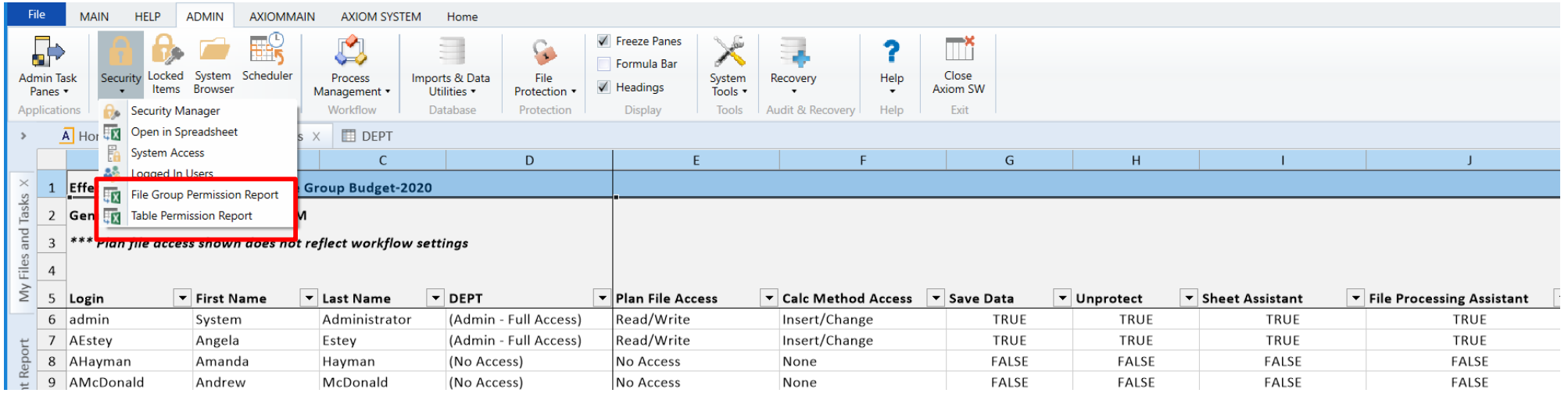
PLAN FILE SECURITY CONFIGURATION REVIEW



ADMIN | Security | File Group Permission Report

- Report to review security by user
- Confirm Interacts with Process Management is on for users and that their base permissions are as expected.
- Update Security, as needed

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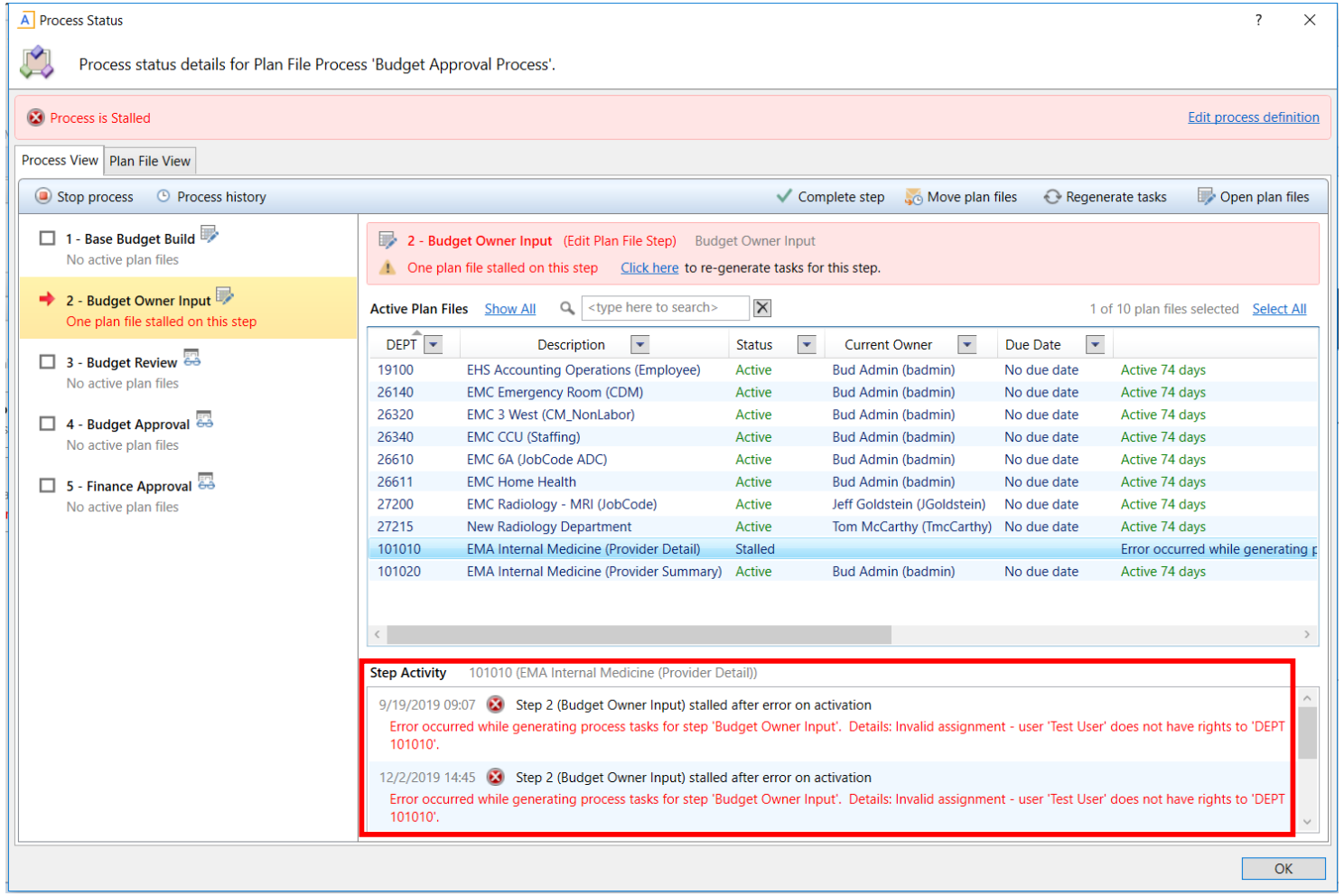
PROCESS MANAGEMENT – STARTING THE PROCESS



The process is stalled due to an invalid user assignment.

- Update the user assignment in dimensions (Dept.Owner)
- Confirm access rights in Security for the assigned user

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Questions and Answers

Please send suggestions for future webinars to

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