



AXIOM INSIGHTS webinar

(Based upon Version 2019.3)

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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

REGISTRATION IS OPEN!



ELEVATING PERFORMANCE.
TOGETHER.

April 26-29, San Antonio, Texas

EARLY BIRD PRICING
THROUGH 12/20/19

summit.kaufmanhall.com



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

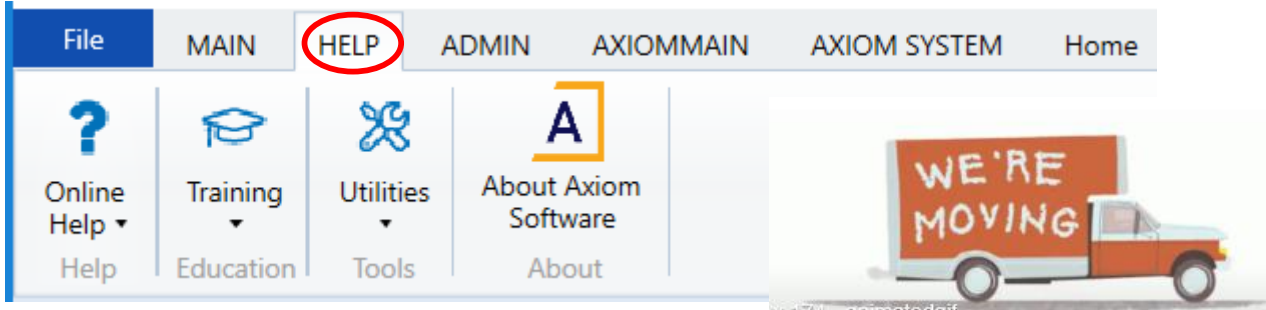
Register: Visit the “Events” page on [kaufmanhall.com](https://www.kaufmanhall.com)

Overview of the online Axiom HELP system

OVERVIEW OF THE ONLINE AXIOM HELP SYSTEM

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

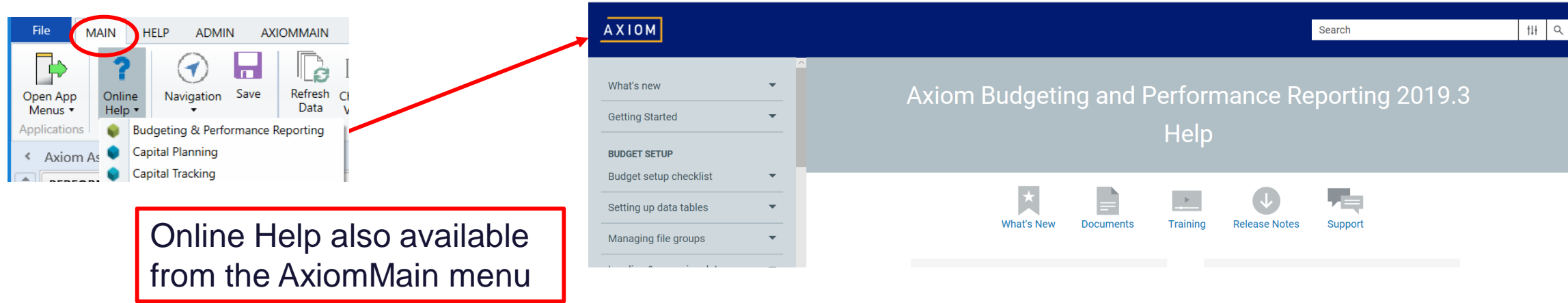
AXIOM HELP – OVERVIEW



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

AXIOM HELP – ONLINE HELP



- 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

AXIOM HELP – ONLINE RESOURCES

The screenshot shows the Axiom Software Help website. The header is dark blue with the 'AXIOM' logo on the left and a search bar on the right. Below the header is a light gray navigation bar with icons for 'What's New', 'Documents', 'Training', 'Downloads', and 'Support'. The left sidebar is a light gray menu with categories like 'What's New', 'Using Axiom', 'Web Reports', 'FILE DESIGN', 'SYSTEM ADMINISTRATION', and 'MORE INFORMATION'. The main content area is white and features a 'Version 2019.3' announcement, a 'Troubleshooting' section, and a 'Latest Updates' section. Callouts with green borders and lines pointing to specific elements provide additional context.

AXIOM Search

Axiom Software Help

What's New Documents Training Downloads Support

Version 2019.3

Welcome to Kaufman Hall's Axiom Software Suite—sophisticated, flexible performance management solutions that empower finance professionals to analyze results, model the future, and optimize organizational decision making.

Version 2019.3 features enhancements such as:

- **File Collect:** Perform file collect using multipass processing, to dynamically iterate file collection and create report packages based on a specified dimension. Additionally, a new feature is available to consolidate multiple attachments into a single email.
- **File Groups:** New commands to open the Plan File Directory or Process Directory for a specified file group, to allow launching the web directories from task panes, ribbon tabs, and Axiom forms.
- **Imports:** Ability to import data into a table with an identity column, and either auto-generate new identity records or create records with specific identity values.
- **Performance optimizations:** Various enhancements can be leveraged to improve file performance, including the ability to batch Axiom queries across sheets, process multiple save-to-database blocks concurrently, and use a lightweight method to return related values in plan files.

See [What's new](#) and [Release notes](#) for more information.

Troubleshooting

Need help resolving an error or other issue in Axiom Software? Search our [Troubleshooting knowledge base](#) for answers to common issues.

Latest Updates

Latest patch: 2019.3.25 (October 31, 2019)
See the updated [release notes](#) for information on fixes included in this patch.

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

Training on all Axiom features and capabilities

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

The screenshot displays the Axiom Software Help website. At the top, a dark blue header contains the 'AXIOM' logo on the left and a search bar on the right. Below the header, a light gray navigation bar features the title 'Axiom Software Help' and five icons with labels: 'What's New' (star), 'Documents' (document), 'Training' (play button), 'Downloads' (download arrow), and 'Support' (speech bubble). A left-hand sidebar lists various help topics under three main categories: 'What's New', 'Using Axiom', and 'Web Reports'. The 'Using Axiom' category is expanded, showing sub-topics like 'FILE DESIGN', 'Data Queries', 'Axiom File Setup', 'Axiom Forms', and 'File Processing'. The 'SYSTEM ADMINISTRATION' category includes 'File Groups', 'Scheduler', 'Security', and 'Other Administration'. The 'MORE INFORMATION' category includes 'Troubleshooting', 'Technical Information', 'Release Information', and 'Reference'. The main content area on the right is titled 'Version 2019.3' and features a large 'A' icon. It contains a welcome message, a list of enhancements for Version 2019.3 (File Collect, File Groups, Imports, and Performance optimizations), and a link to 'What's new and Release notes'. To the right of the main content, there are two additional sections: 'Troubleshooting' with a gear icon and a link to the 'Troubleshooting knowledge base', and 'Latest Updates' with a checkmark icon and a link to the 'Latest patch: 2019.3.25 (October 31, 2019)'.

AXIOM Search

Axiom Software Help

[What's New](#) [Documents](#) [Training](#) [Downloads](#) [Support](#)

Version 2019.3

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Latest Updates

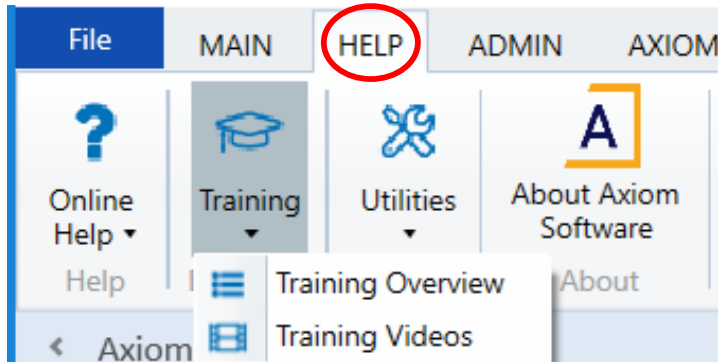
Latest patch: 2019.3.25 (October 31, 2019)
See the updated [release notes](#) for information on fixes included in this patch.

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**

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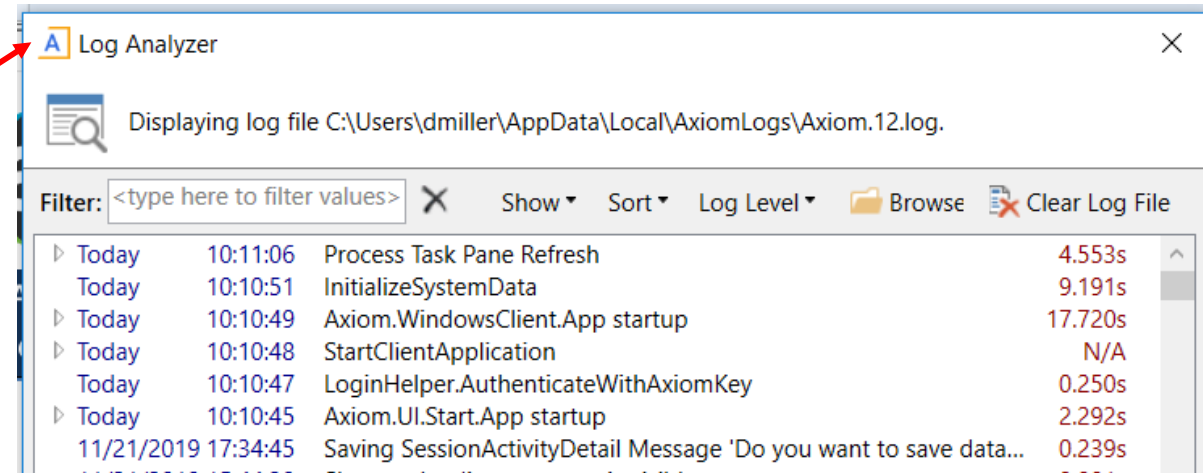
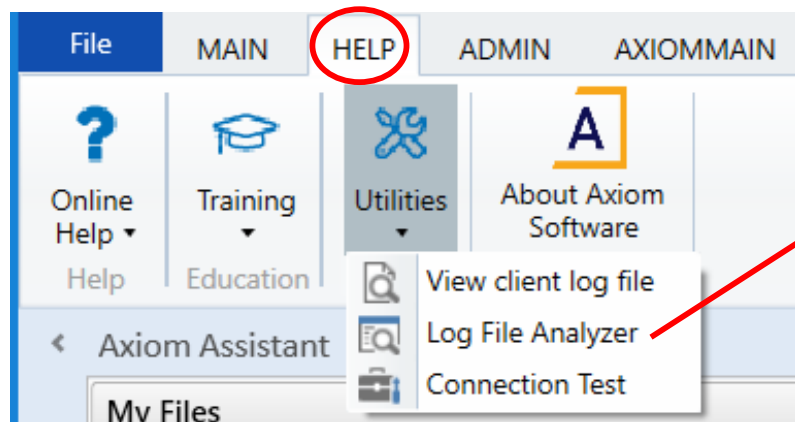
AXIOM HELP – ONLINE TRAINING



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

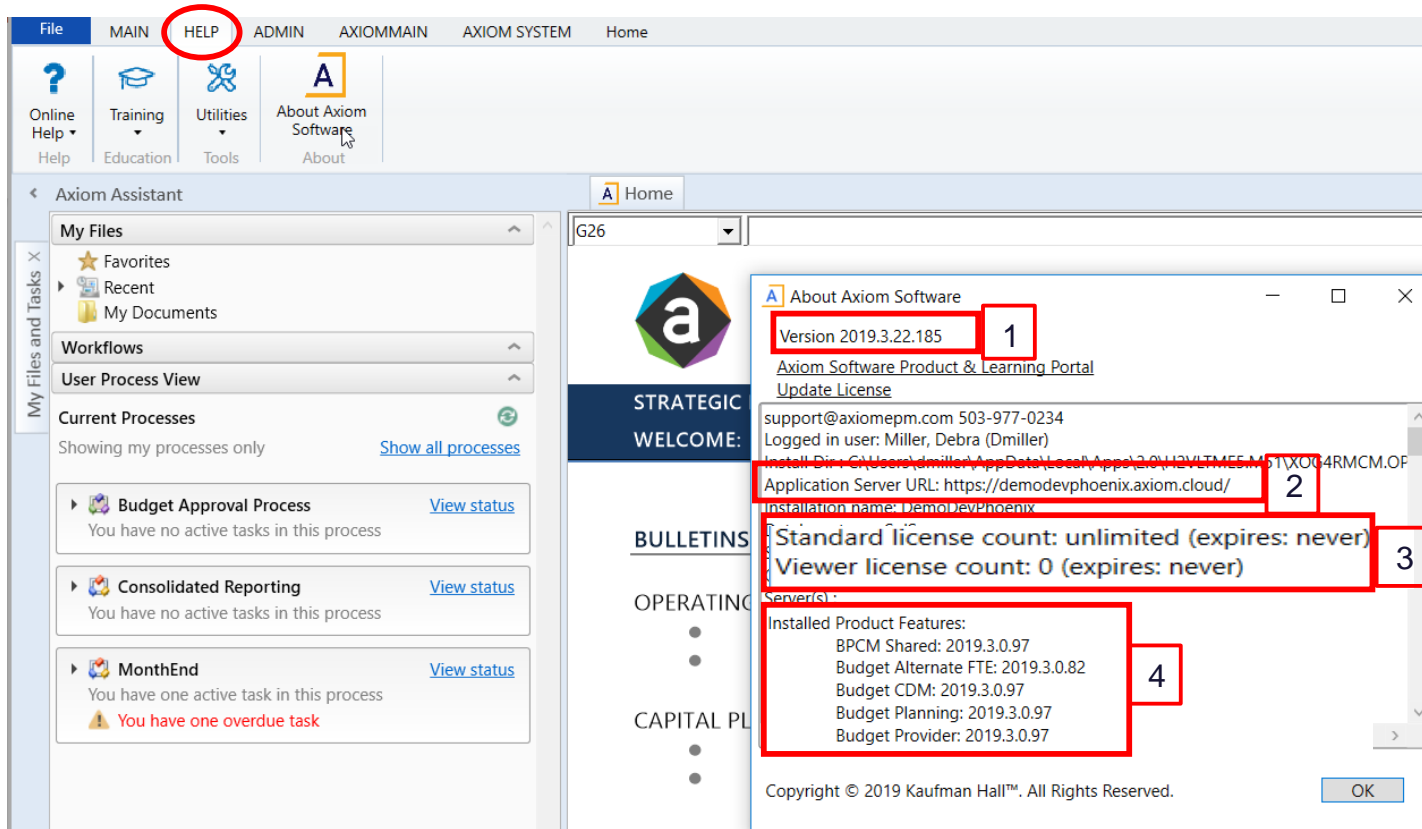
AXIOM HELP – UTILITIES



- 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

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

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Steps to take if the software appears slow

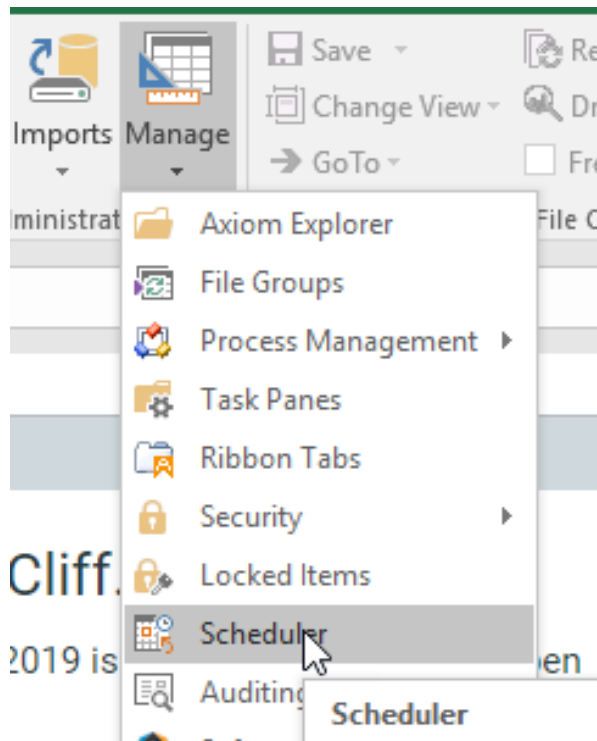
SLOW PERFORMANCE TROUBLESHOOTING STEPS

- 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

CHECK SCHEDULED JOBS

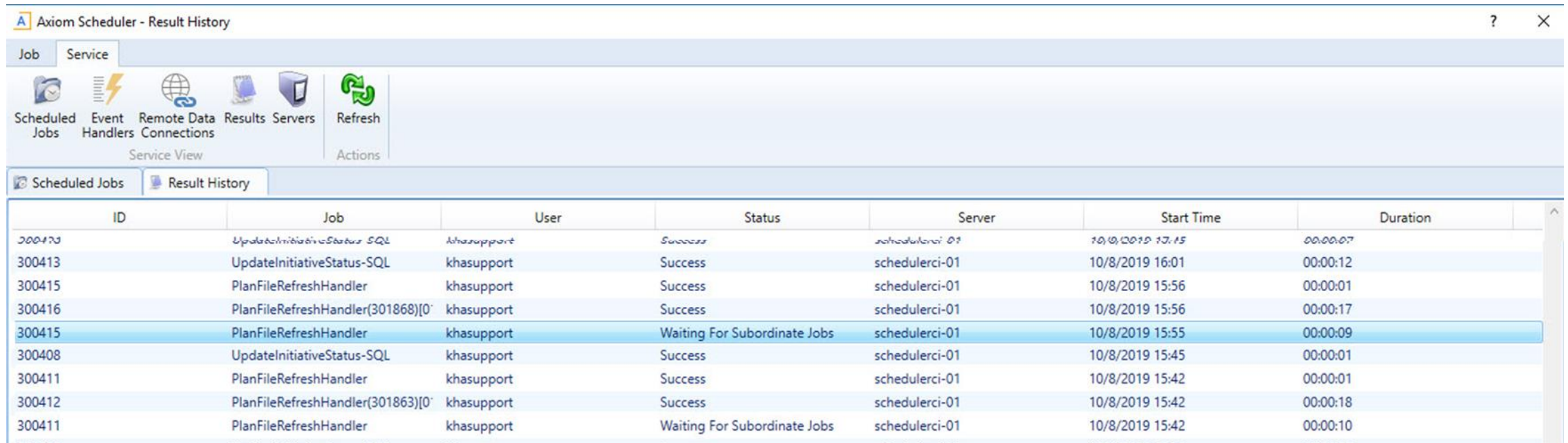
One or more scheduled jobs may be running and tying up resources.

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



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.



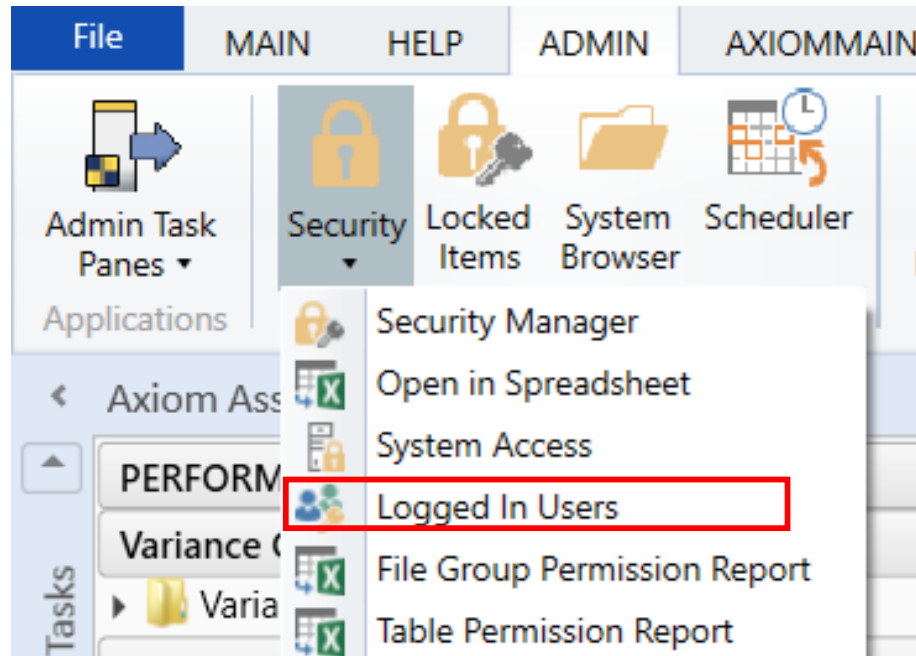
ID	Job	User	Status	Server	Start Time	Duration
300413	UpdateInitiativeStatus-SQL	khasupport	Success	schedulerci-01	10/8/2019 15:55	00:00:07
300413	UpdateInitiativeStatus-SQL	khasupport	Success	schedulerci-01	10/8/2019 16:01	00:00:12
300415	PlanFileRefreshHandler	khasupport	Success	schedulerci-01	10/8/2019 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

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.

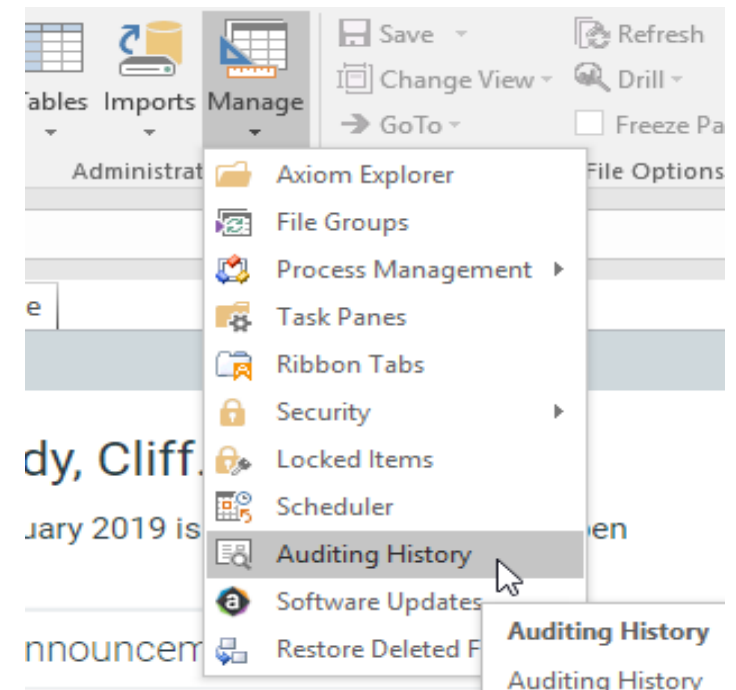


SYSTEMIC OR LOCALIZED

- 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

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

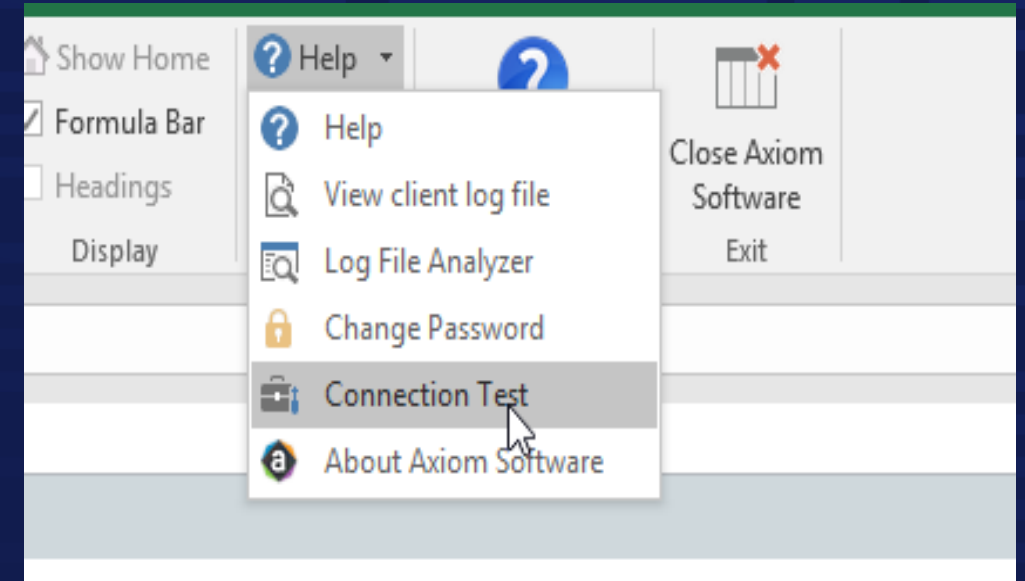


UNIQUE TO REPORT OR PROCESS

- 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](#))

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



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

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

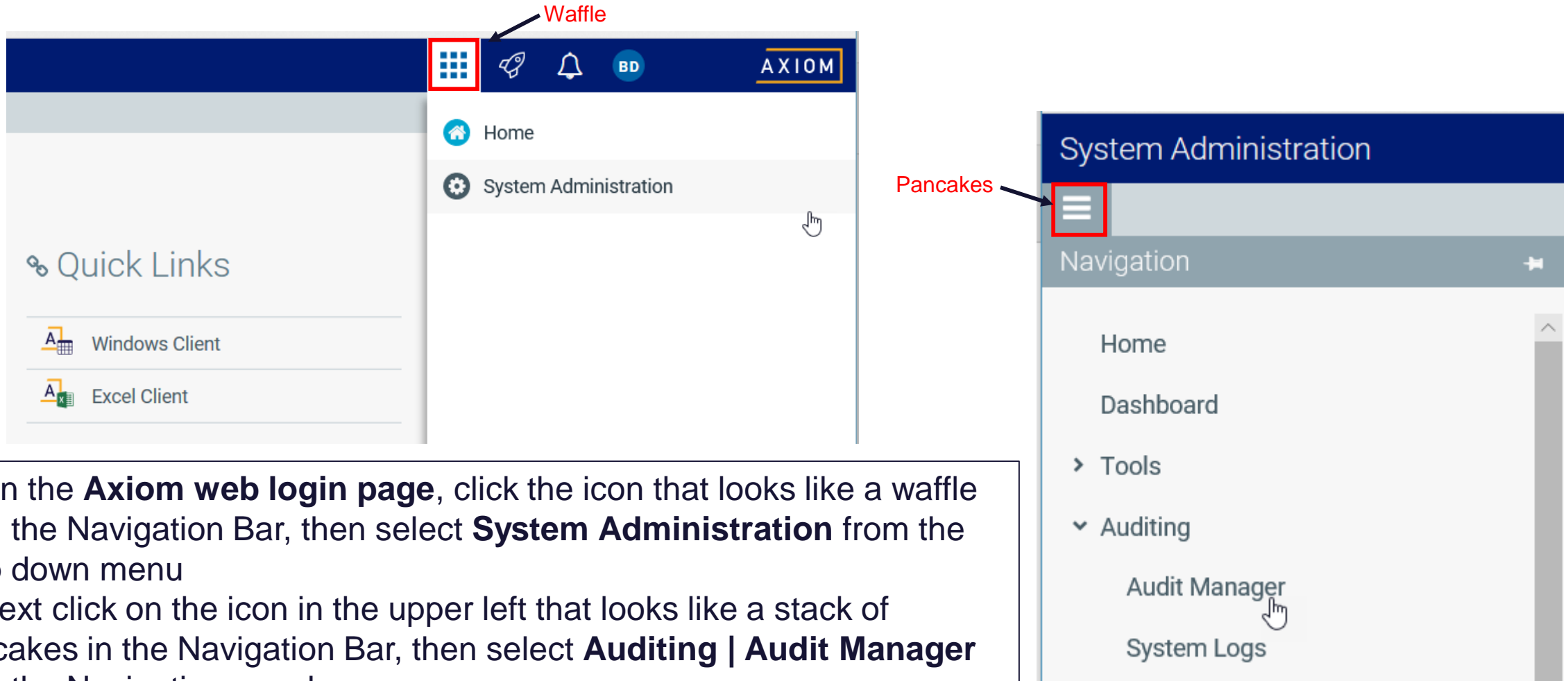
A dark blue rectangular box containing a white search bar. The search bar has the word "Search" in a light gray font. To the right of the text input area are two icons: a vertical list icon (three horizontal lines) and a magnifying glass icon.

Using the Audit Manager to track activity

AUDIT MANAGER

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

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.

How to use the Audit Manager

System Administration

BD

AXIOM

☆

?

Activities

User Sessions

From: yesterday today

Activity Types:

Document:

To:

User:

Table:

☐ Include scheduler clients

Top-level activities

100 activities*

Activity Type	Activity Name	User Session	Started	Ended	Duration	Children
Open Document	GetDocumentData	Brent Day (bday)	2019-11-26 9:38:45 AM	2019-11-26 9:38:45 AM	0ms	0 children
Axiom Explorer	AxiomExplorerWindow	Brent Day (bday)	2019-11-26 9:37:10 AM	2019-11-26 9:38:46 AM	1m 35s	1 child
			2019-11-26 9:27:43	2019-11-26 9:27:44		

Details for GetDocumentData

Related Tables:

Document

Related Documents:

Auditing.axl open document

Detail Messages:

AccessType=ReadOnly DocumentVersion=2 IsSuccess=True

How to use the Audit Manager

System Administration

AXIOM

Activities User Sessions

From: **yesterday** today 2019-11-25 12:00 AM x

To: 2019-11-26 12:00 AM x

Activity Types: x

User: x

Document: x

Table: x

☐ Include scheduler clients

Filtered activities 318 activities

Activity Type	Activity Name	User Session	Started	Ended	Duration	Children
Save Document	Drill_27e4a0ff7626426cbe5...	Brent Day (bday)	2019-11-25 5:42:41 PM	2019-11-25 5:42:41 PM	0ms	0 children
Open Document	GetDocumentData	Brent Day (bday)	2019-11-25 5:42:41 PM	2019-11-25 5:42:41 PM	0ms	0 children

Details for Drill_27e4a0ff7626426cbe5ee66507711819.xlsx

Related Tables:
Document

Detail Messages:
Create new document 'Axiom\Axiom System\Scheduler Working Folder\Drill_27e4a0ff7626426cbe5ee66507711819.xlsx'

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

How to use the Audit Manager

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

The screenshot displays the AXIOM System Administration interface. A modal dialog titled "Select Activity Types" is open, allowing the user to choose specific activity types for auditing. The dialog includes a "Select:" dropdown with options "all" and "none". A list of activity types is shown with checkboxes, and "Modify Table Structure" is selected and highlighted with a red circle. The background interface shows the "Activities" tab with filters for "From:" (2019-11-25 12:00 AM) and "To:" (2019-11-26 12:00 AM). A table of filtered activities is visible, showing columns for Activity Type, Activity Name, Duration, and Children. The table lists activities like "Save Document" and "Open Document".

Activity Type	Activity Name	Duration	Children
Save Document	Drill_27e4a0ff7626426cbe5...	0ms	0 children
Open Document	GetDocumentData	0ms	0 children

How to use the Audit Manager

Next click on the funnel filter icon in the Table selection

How to use the Audit Manager

This example uses the DEPT table

The screenshot shows the 'System Administration' interface with the 'User Sessions' tab selected. A 'Select a Table' dialog box is open, displaying a list of tables. The 'DEPT' table is highlighted with a red circle. The background interface includes filters for 'From' and 'To' dates, 'Activity Types', and 'User'. Below the filters, there is a table of 'Filtered activities' and a 'Details for SaveTableStructure' section.

System Administration

Activities **User Sessions**

From: yesterday today 2019-11-25 12:00 AM
To: 2019-11-26 12:00 AM
Activity Types: Modify Table Structure
User:
☐ Include scheduler clients

Filtered activities

Activity Type	Activity Name	User
Modify Table Structure	SaveTableStructure	Brent
Modify Table Structure	SaveTableStructure	Brent

20 activities

Activity Name	Parent Activity	Children
373ms	Edit Table	0 children
690ms	Edit Table	0 children

Details for SaveTableStructure

Related Tables: ColumnDefinition CustomerTable DEPT

Detail Messages: SaveTableStructure

Select a Table

- ACCT
- ACCT_with_Hierarchies
- AxSource
- CIF
- Customer
- DEPT**
- DTYPE
- FGID
- ITYPE

OK Cancel

How to use the Audit Manager

System Administration

BD

AXIOM

Activities

User Sessions

From: yesterday today

2019-11-25 12:00 AM

Activity Types:

Modify Table Structure

Document:

☐ Include scheduler clients

To:



2019-11-26 12:00 AM

User:

Table:

DEPT

Filtered activities

Activity Type	Activity Name	User Session	Started	Ended	Duration	Parent Activity	Children
 <u>Modify Table Structure</u>	SaveTableStructure	Brent Day (bday)	2019-11-25 11:51:07 AM	2019-11-25 11:51:20 AM	13s 177ms	Edit Table	0 children
 <u>Modify Table Structure</u>	SaveTableStructure	Brent Day (bday)	2019-11-25 11:49:48 AM	2019-11-25 11:50:00 AM	12s 373ms	Edit Table	0 children
			2019-11-25	2019-11-25			

Details for SaveTableStructure

Related Tables:

ColumnDefinition CustomerTable DEPT

Detail Messages:

SaveTableStructure

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.

4 activities

How to use the Audit Manager

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

System Administration

BD

AXIOM

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Activities

User Sessions

Activity: Edit Table / SaveTableStructure (42336)

User session: Brent Day (bday) Type: Modify Table Structure

Details

Related Tables:

ColumnDefinition

CustomerTable

DEPT

Detail Messages:

SaveTableStructure

Child Activities:

0 activities

Activity Type	Activity Name	Started	Ended	Duration	Children
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How to use the Audit Manager

System Administration

BD

AXIOM

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Activities

User Sessions

Table: ColumnDefinition

User session: Brent Day (bday) Activity: SaveTableStructure

Change details

Drag a column header and drop it here to group by that column

Column Name	Before	After
AISettings		
ColumnClassificationID		0
ColumnDefinitionID		14257
ColumnName		DEPTLv17
Comments		
ConfiguredPartitionSchemeID		
CustomerTableID		1
DataTypeID		1
DataTypeLength		50
DefaultValue		
ForeignKeyExists		False

This shows that a new string column of 50 characters in length and entitled DEPTLv17 was added to the DEPT table

How to use the Audit Manager

System Administration

Activities

User Sessions

From: yesterday today
2019-11-25 12:00 AM

Activity Types:
Modify Table Structure

Document:

☐ Include scheduler clients

To: 2019-11-26 12:00 AM

User:

Table: DEPT

Filtered activities

4 activities

Activity Type	Activity Name	User Session	Started	Ended	Duration	Parent Activity	Children
Modify Table Structure	SaveTableStructure	Brent Day (bday)	2019-11-25 11:51:07 AM	2019-11-25 11:51:20 AM	13s 177ms	Edit Table	0 children
Modify Table Structure	SaveTableStructure	Brent Day (bday)	2019-11-25 11:49:48 AM	2019-11-25 11:50:00 AM	12s 373ms	Edit Table	0 children
			2019-11-25	2019-11-25			

Details for SaveTableStructure

Related To
[ColumnDefinition](#)

View table details
CustomerTable DEPT

Detail Messages:
SaveTableStructure

How to use the Audit Manager

System Administration

BD

AXIOM

Activities

User Sessions

From: yesterday today

2019-11-25 12:00 AM

Activity Types:

Open Document

Document:

☐ Include scheduler clients

To: 2019-11-26 12:00 AM

User:

Table:

Filtered activities

77 activities

Activity Type ↓	Activity Name	User Session	Started	Ended	Duration	Parent Activity	Children
Open Document	GetDocumentData	Brent Day (bday)	2019-11-25 4:19:54 PM	2019-11-25 4:19:54 PM	0ms	Daily Financials BD.xlsx	0 children
Open Document	GetDocumentData	Brent Day (bday)	2019-11-25 4:07:49 PM	2019-11-25 4:07:49 PM	0ms		0 children
			2019-11-25	2019-11-25			

Details for GetDocumentData

Related Tables:

Document

Related Documents:

Daily Financials BD.xlsx open document

Detail Messages:

AccessType=ReadOnly DocumentVersion=2 IsSuccess=True

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

How to use the Audit Manager

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

System Administration

BD

AXIOM

Activities

User Sessions

Activity: Daily Financials BD.xlsx (42473)

User session: Brent Day (bday) Type: Forms Page Request

Details

Related Tables:

DEPT GL2013 GL2019

Related Documents:

Daily Financials BD.xlsx open document

Detail Messages:

GetDynamicRange Daily Financials!Axiom Query #2 table=GL2013
GetDynamicRange Daily Financials!Axiom Query #3 table=GL2019

Child Activities:

1 activities

Activity Type ↓	Activity Name	Started	Ended	Duration	Children
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Details for GetDocumentData

Related Tables:

Document

Related Documents:

Daily Financials BD.xlsx open document

Detail Messages:

AccessType=ReadOnly DocumentVersion=2 IsSuccess=True

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

System Administration

BD

AXIOM

Activities

User Sessions

From: yesterday today

Client Types:

☐ Include scheduler clients

To:

User:

User Sessions:

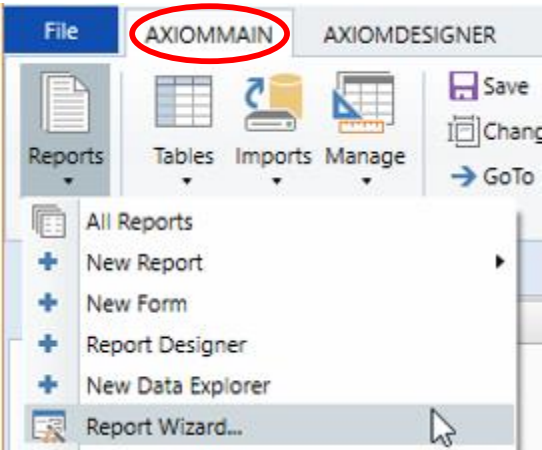
100 sessions*

User	Login	Logout	Machine Name	IP Address	Domain	Client Type	Impersonated By	Activities
Brent Day (bday)	2019-11-25 5:38:23 PM		BDAY0518	10.0.222.14	Kaufmanhall	Web		View
Brent Day (bday)	2019-11-25 5:37:23 PM	2019-11-25 5:45:05 PM	BDAY0518	10.0.222.14	Kaufmanhall	Web		View
Brent Day (bday)	2019-11-25 5:37:12 PM	2019-11-25 5:45:05 PM	BDAY0518	10.0.222.14	Kaufmanhall	Web		View
Brent Day (bday)	2019-11-25 5:37:06 PM	2019-11-25 5:45:05 PM	BDAY0518	10.0.222.14	Kaufmanhall	Web		View
Brent Day (bday)	2019-11-25 5:33:50 PM		BDAY0518	10.0.222.14	Kaufmanhall	Web		View
Brent Day (bday)	2019-11-25 5:26:34 PM	2019-11-25 5:40:05 PM	BDAY0518	10.0.222.14	Kaufmanhall	Web		View

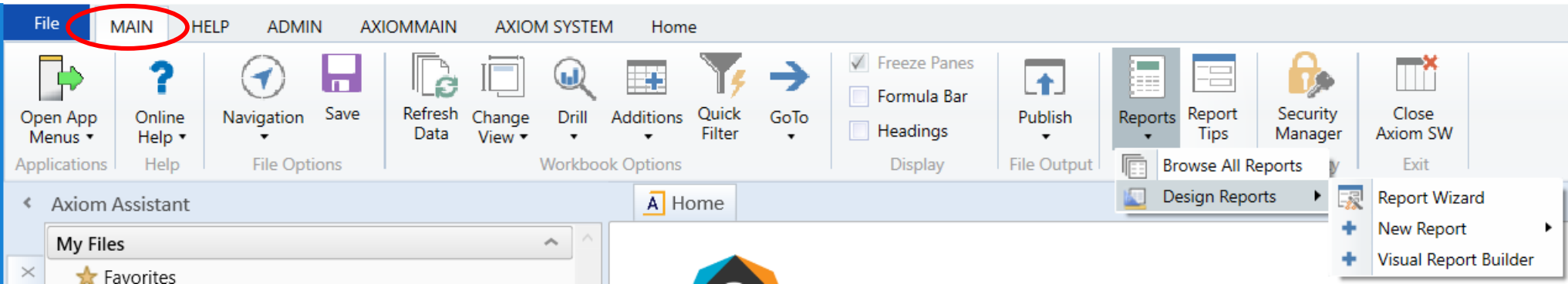
OTHER AUDIT REPORTING – REPORT WIZARD

Open the Report Wizard from the Reports menu dropdown

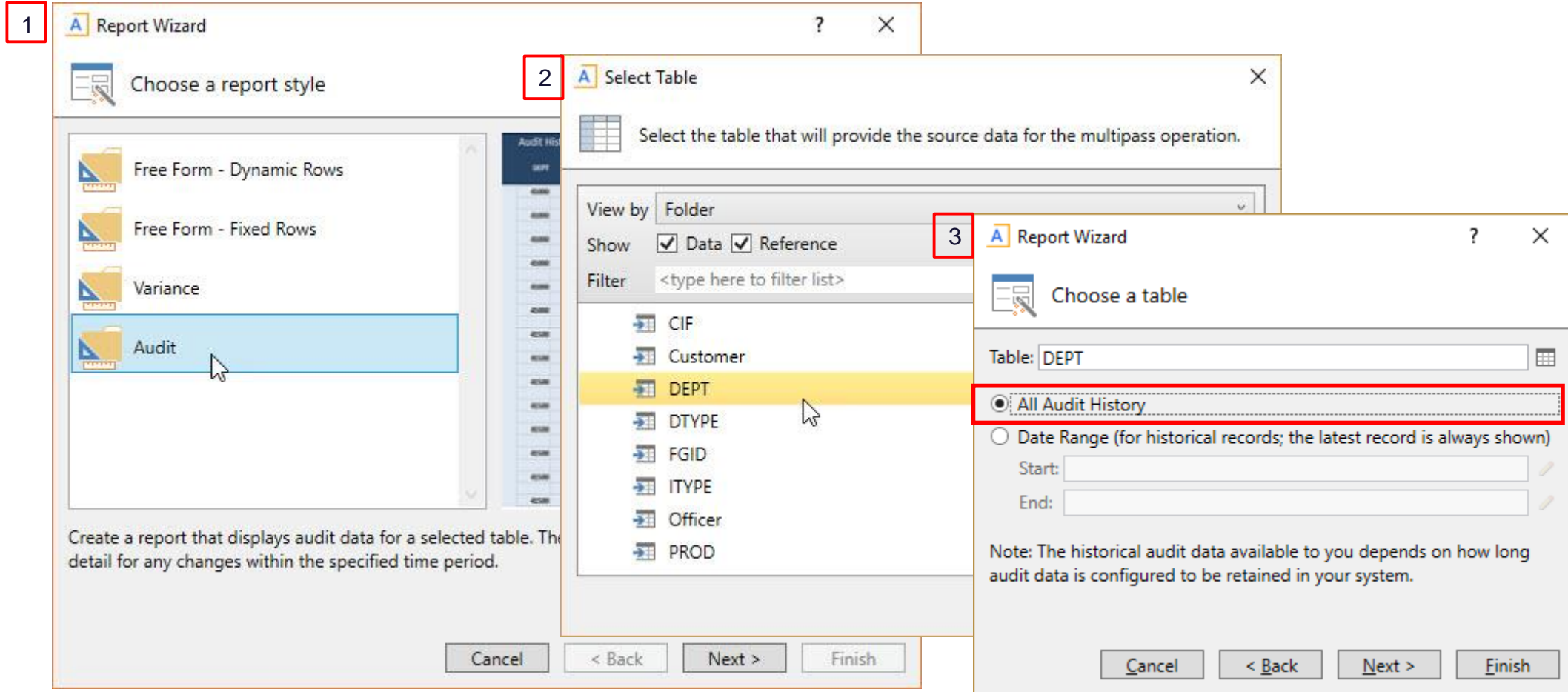
AXIOM Main | Reports | Report Wizard



MAIN | Reports | Design Reports | Report Wizard



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)

Report Wizard

Audit History for DEPT															Previous Versions		
DEPT	StandardReport	StandardReport	StandardReport	Budget	Manager	Director_MD	Director_LOB	Director_Vertical	Director_Team	Region	Community	Branch	DeptLvl4	DEPTLvl4	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	Other	Manager	Anderson Group	LOB1	Vert3	Dir2	Other	Anderson Gro Corporate Administration			bday	10/18/2019 23:11	1
100003	Other	Other	100002	Other	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	Manager	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	Manager	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	Manager	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	Manager	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	Manager	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	Manager	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.

Common import data errors

COMMON IMPORT DATA ERRORS

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

INCORRECT DATA FORMAT / DATATYPE

Case 1 – Incorrect datatype

Execution log:

```
9:45:22 AM Starting import 'Import Loan Sales'
9:45:43 AM Extracting data: X:\Finance Reports\Loan Sales\Test for Christine_04262019.xlsx
9:45:54 AM The file could not be uploaded to the server.
The following errors occurred during import:
Decimal value 0.379999999999995 in row 969 cannot be imported into column 'Net_Line_Fluctuations_'. Decimal values are limited to 14 digits on each side of the decimal point.
9:45:54 AM Finished import 'Import Loan Sales'
Import Failed: The file could not be uploaded to the server.
The following errors occurred during import:
Decimal value 0.379999999999995 in row 969 cannot be imported into column 'Net_Line_Fluctuations_'. Decimal values are limited to 14 digits on each side of the decimal point.
```

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.

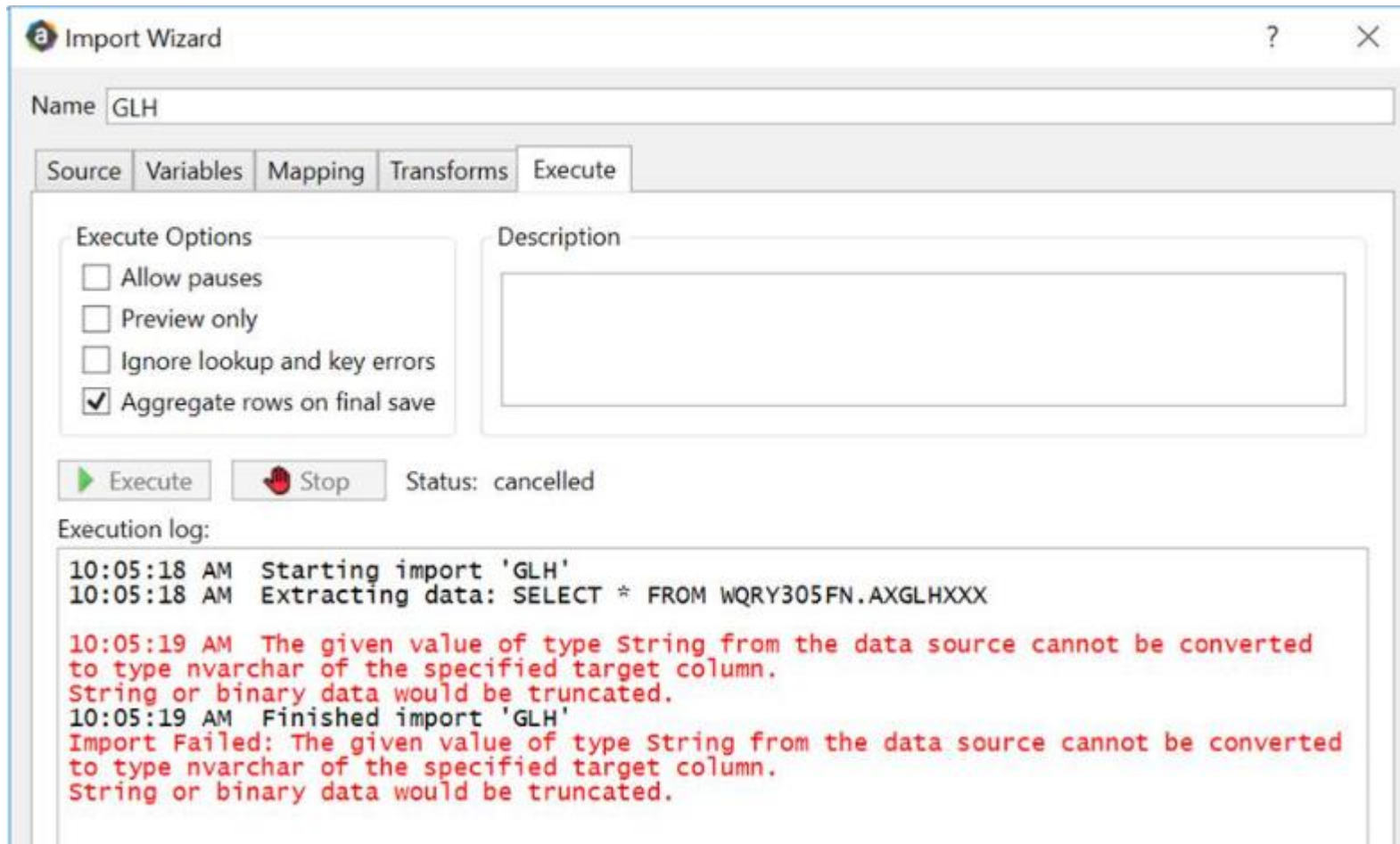
Note: Axiom still offers Decimal datatype for backwards compatibility.

Please use Numeric or Integer in the future

- Integer does not have decimals
- Numeric has decimals

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

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:

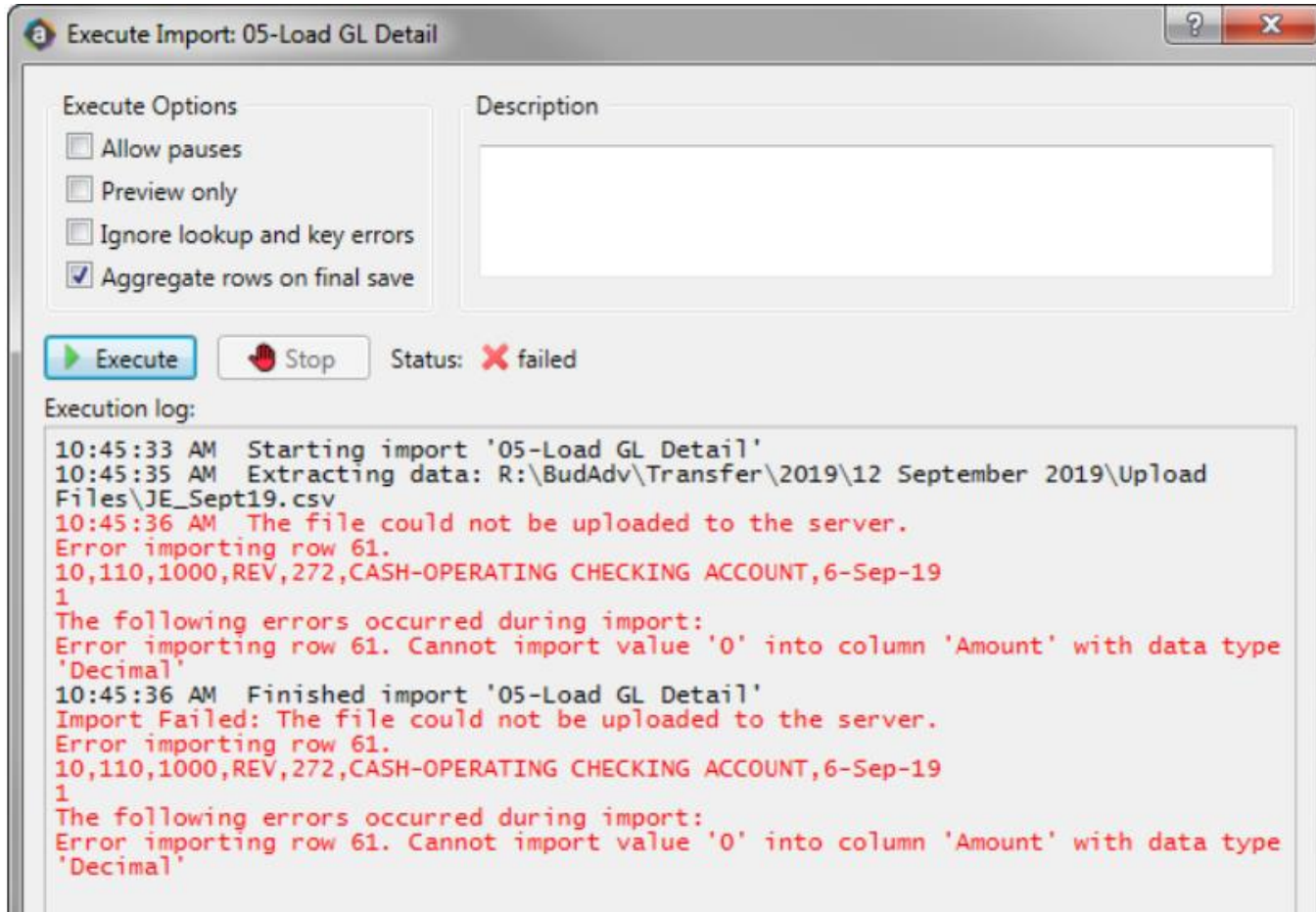
```
2:55:36 PM Starting import 'Budget Depreciation Expense'
2:55:38 PM Extracting data: F:\Budget & Reforecast\2020 Budget\Import Files\Depreciation 60 months CC.csv
2:55:39 PM Imported data into dbo.tmp135_39031
2:55:39 PM Running transforms...
2:55:39 PM Transform 1: Select * From dbo.tmp135_39031
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.

INCORRECT COLUMN MAPPING

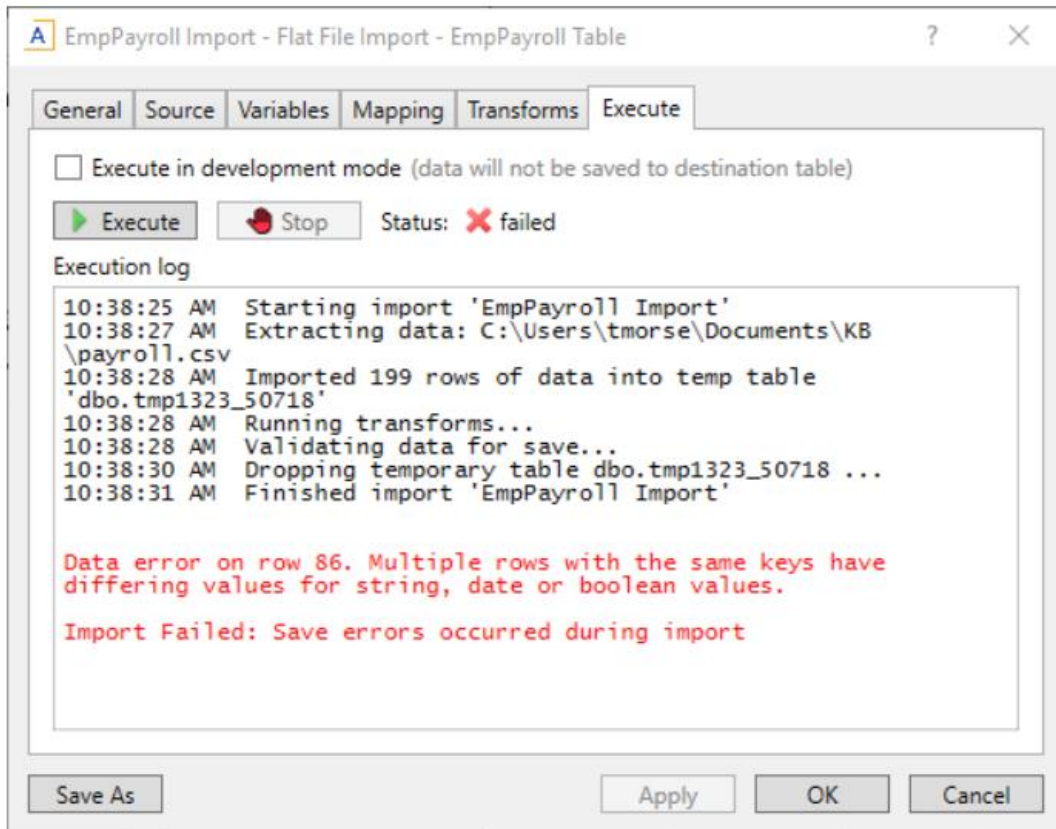


Issue: Existing import stopped working after some changes on the source system.

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.

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

Common issues with scheduled imports and results

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

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

The screenshot displays the 'Security Management for Axiom Support Training' application. On the left, a list of users is shown, with 'Coiner, William (wcoiner)' selected. The right pane shows the 'User: Coiner, William (wcoiner)' details. The 'General' tab is active, showing fields for First Name (William), Last Name (Coiner), Email (wcoiner@kaufmanhall.com), License Type (Standard), Authentication (SAML), and Login (wcoiner). Below these fields, there are two checked checkboxes: 'Enabled' and 'Administrator'. A yellow arrow points to the 'Administrator' checkbox.

Security Management for Axiom Support Training

● Users ○ Roles ○ Subsystems

Sort By: Last Name

Show: ☒ Enabled ☒ Disabled

<type here to filter list>

aaa, Copy of plan file security (as
alltables access, Copy of Test2 (te
Baker, Jeff (jbaker)
Bird, Jason (jbird)
Bogumil, Scott (sbogumil)
Brooks, Chris (cbrooks)
Brooks, Joshua (jbrooks)
capital tracking, test (xxx)
Cartensen, Carl (ccartensen)
Coiner, William (wcoiner)
Couch, Abby (acouch)
Davis, Eric (edavis)
Decker, John (jdecker)
Development, Axiom (kha_develc

User: Coiner, William (wcoiner)

General Permissions File Groups Tables AI Tables Files Sta

Edit general information.

User Details

First Name William

Last Name Coiner

Email wcoiner@kaufmanhall.com

License Type Standard

Authentication SAML

Login wcoiner

☒ Enabled

☒ Administrator

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

The screenshot shows the SQL Server Enterprise Manager interface. The left pane displays the tree structure with the following nodes: General, Variables, Scheduling Rules, Event Handlers, Notification, Tasks, FoldersareLocaltoCIS, FoldersareExternaltoCIS, and Results. The 'Results' node is selected, and a yellow arrow points to it. A red circle with the number '2' is placed over the 'Results' node. The right pane displays the job details for the selected job. The job is named 'TestImportfromDirectoryMultipleFilesArhiveFeature' and has a 'Result: Failed' status. The job details include the following information:

Item	Status	Started	Duration	User	Server	Result
ID: 317467	Failed	11/26/2019 12:44	00:00:08	wcoiner	schedulerci-01	Failed
Job: TestImportfromDirectoryMultipleFil	Failed	11/26/2019 12:44	00:00:08			Failed
Import Failed: not-null property references a null or transient value Axiom.DAL.NH.AppDb.ImportResult.Message						
Task: FoldersareLocaltoCIS	Success	11/26/2019 12:44	00:00:00			Success
11/26/2019 12:44 Task is marked as inactive						
Task: FoldersareExternaltoCIS	Failed	11/26/2019 12:44	00:00:07			Failed
Import Failed: not-null property references a null or transient value Axiom.DAL.NH.AppDb.ImportResult.Message						
11/26/2019 12:44 ETLPackageTask: package = MultipleFilesTest-FoldersExternaltoCIS						
11/26/2019 12:44 ETLPackageTask: state =						
SourceFileName = \\skswts01\HT\Source						
11/26/2019 12:44 Starting import 'MultipleFilesTest-FoldersExternaltoCIS'						
11/26/2019 12:44 No matching files found to import in directory \\skswts01\HT\Source						
11/26/2019 12:44 Import Failed: not-null property references a null or transient value Axiom.DAL.NH.AppDb.ImportResult.Message						

SOURCE FILE PATH ERRORS

⚠	ID: 317471	Result: Failed	Started: 11/26/2019 12:48	Duration: 00:00:05	User: wcoiner
⚠	Job: TestImportfromDirectoryMultipleFil	Started: 11/26/2019 12:48	Duration: 00:00:05	Server: schedulerci-01	
	Import Failed: The network path was not found.				
✓	Task: FoldersareLocaltoCIS	Started: 11/26/2019 12:48	Duration: 00:00:00	Result: Success	
⚠	Task: FoldersareExternaltoCIS	Started: 11/26/2019 12:48	Duration: 00:00:04	Result: Failed	
	Import Failed: The network path was not found.				
	11/26/2019 12:48 ETLPackageTask: package = MultipleFilesTest-FoldersExternaltoCIS				
	11/26/2019 12:48 ETLPackageTask: state =				
	SourceFileName = \\skswts01\HT\Source				
	11/26/2019 12:48 Starting import 'MultipleFilesTest-FoldersExternaltoCIS'				
	11/26/2019 12:48 The network path was not found.				

- 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



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

Axiom Scheduler - Scheduled Jobs

Job

Service

Scheduled Jobs

Event Handlers

Remote Data Connections

Results

Servers

Refresh

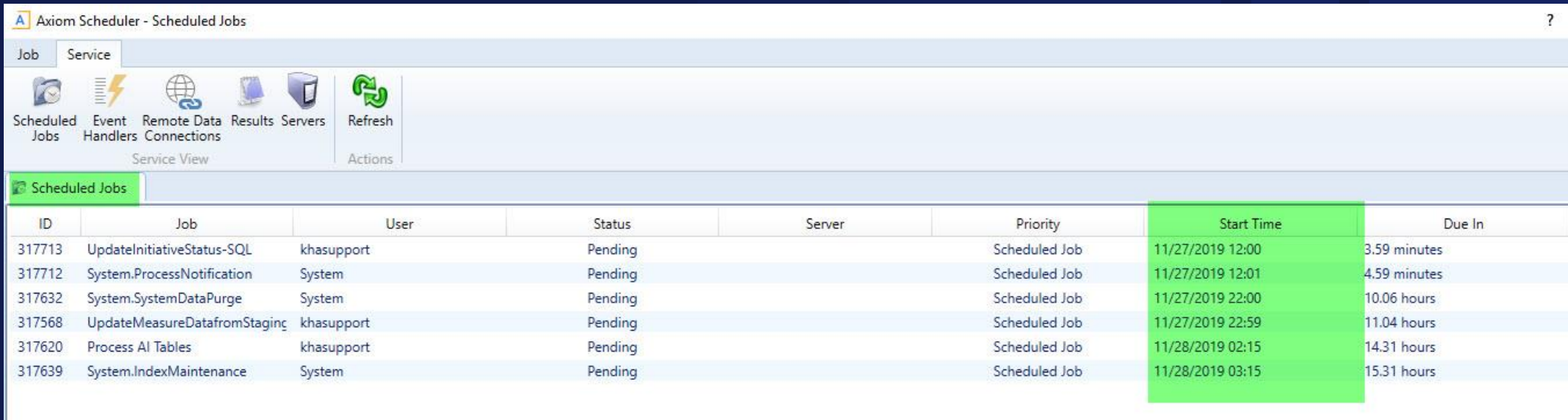
Service View

Actions

Scheduled Jobs

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

MULTIPLE JOBS SCHEDULED TO RUN AT THE SAME TIME



The screenshot shows the 'Axiom Scheduler - Scheduled Jobs' window. It has a top navigation bar with 'Job' and 'Service' tabs. Below the tabs is a 'Service View' section with icons for 'Scheduled Jobs', 'Event Handlers', 'Remote Data Connections', 'Results', 'Servers', and a 'Refresh' button. The main area displays a table of scheduled jobs. The table has columns for ID, Job, User, Status, Server, Priority, Start Time, and Due In. The 'Start Time' column is highlighted in green. The jobs listed are:

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

Process flow and plan file security configuration

PROCESS FLOW OVERVIEW

Edit Plan File Process

Edit the definition of plan file process 'Budget Approval Process' in File Group 'Budget-2020'.

This process is currently active. Changes made will affect the active process and some types of changes will not be allowed. [View status details](#)

Process Properties | Process Steps | Notifications | Web Configuration | Advanced Properties

+ Add Duplicate Delete

- Base Budget Build
- Budget Owner Input
- Budget Review
- Budget Approval
- Finance Approval

Steps in the process

Step Properties | Assignments | Step Notifications

Edit Plan File Step

Display Text: Base Budget Build

Description: Build Base Budgets

Define step properties, owner assignment and due date, and step-specific notifications

Process Step Configuration

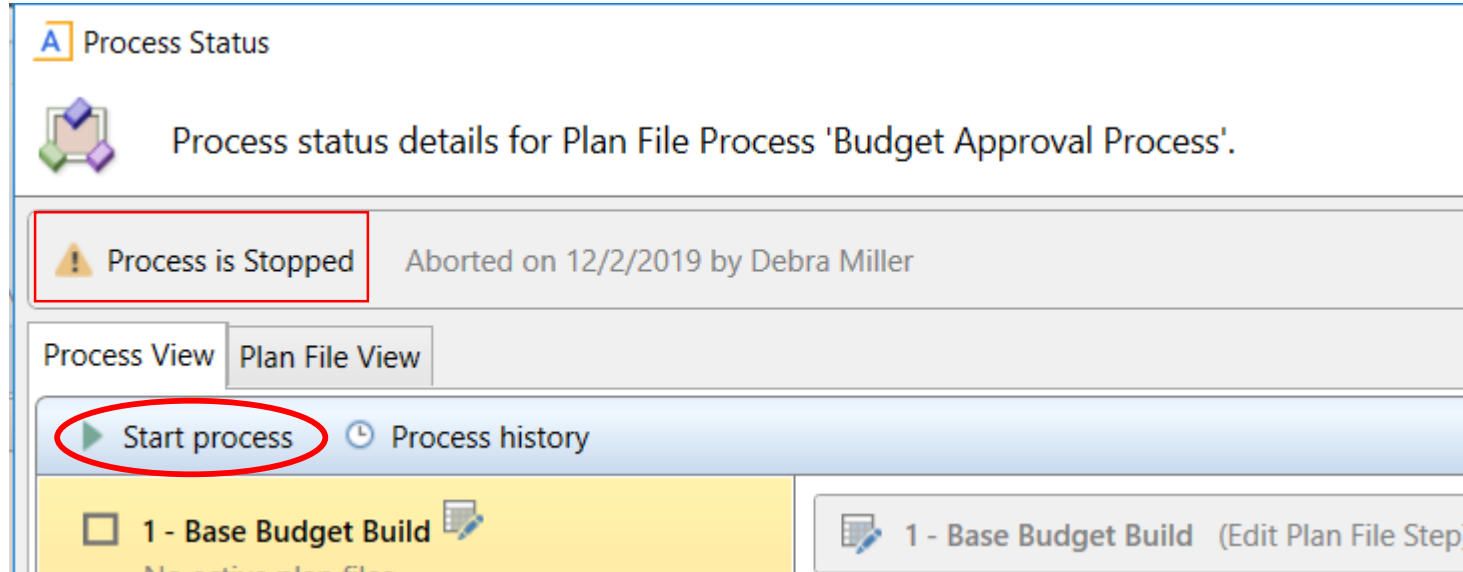
Open forms-enabled plan files as: Form in the client

Define general process properties, process steps, and notifications

Process Flow

- Define Process Steps
- Notifications
- Assignments
- Due Dates

PROCESS FLOW OVERVIEW

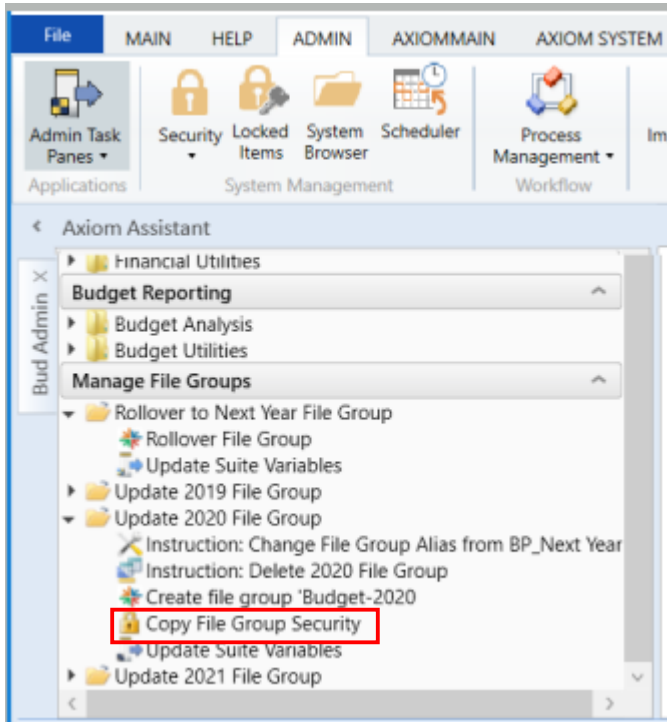


Before releasing plan files, the process must be started

ADMIN | Process Management | Process Definitions

Select **Start process**

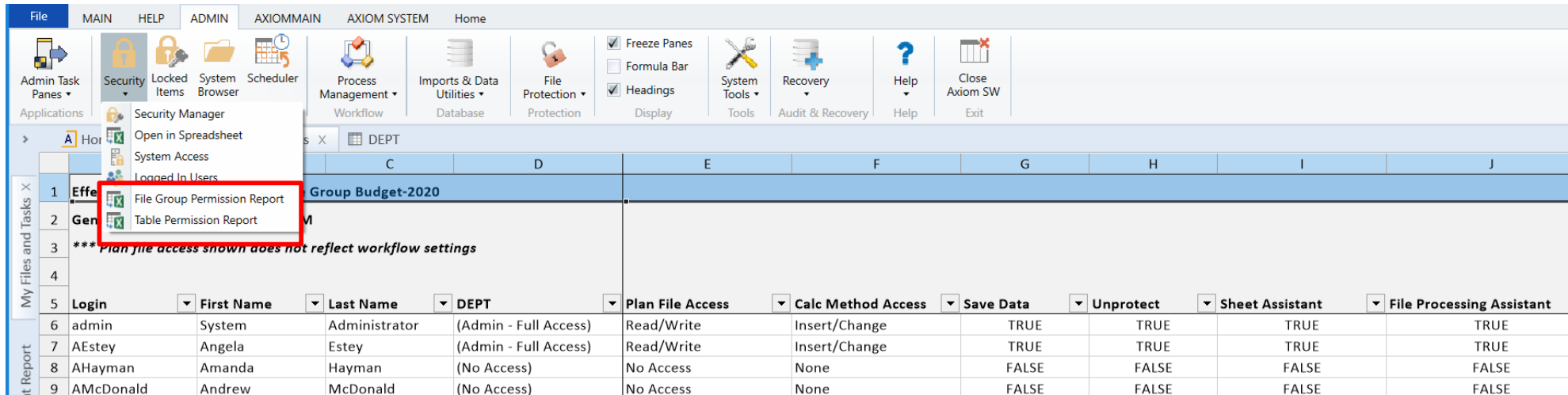
PLAN FILE SECURITY CONFIGURATION



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

PLAN FILE SECURITY CONFIGURATION REVIEW



The screenshot displays the AXIOM SYSTEM interface. The 'Security' menu is open, showing options like 'Security Manager', 'Open in Spreadsheet', 'System Access', 'Logged In Users', 'File Group Permission Report', and 'Table Permission Report'. The 'File Group Permission Report' is highlighted. Below the menu, a table lists user permissions for various system functions.

Login	First Name	Last Name	DEPT	Plan File Access	Calc Method Access	Save Data	Unprotect	Sheet Assistant	File Processing Assistant
admin	System	Administrator	(Admin - Full Access)	Read/Write	Insert/Change	TRUE	TRUE	TRUE	TRUE
AEstey	Angela	Estey	(Admin - Full Access)	Read/Write	Insert/Change	TRUE	TRUE	TRUE	TRUE
AHayman	Amanda	Hayman	(No Access)	No Access	None	FALSE	FALSE	FALSE	FALSE
AMcDonald	Andrew	McDonald	(No Access)	No Access	None	FALSE	FALSE	FALSE	FALSE

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

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

Process Status

Process status details for Plan File Process 'Budget Approval Process'.

Process is Stalled [Edit process definition](#)

Process View | Plan File View

Stop process | Process history | Complete step | Move plan files | Regenerate tasks | Open plan files

1 - Base Budget Build
No active plan files

2 - Budget Owner Input **One plan file stalled on this step**

3 - Budget Review
No active plan files

4 - Budget Approval
No active plan files

5 - Finance Approval
No active plan files

2 - Budget Owner Input (Edit Plan File Step) Budget Owner Input

One plan file stalled on this step [Click here](#) to re-generate tasks for this step.

Active Plan Files [Show All](#) 1 of 10 plan files selected [Select All](#)

DEPT	Description	Status	Current Owner	Due Date	
19100	EHS Accounting Operations (Employee)	Active	Bud Admin (badmin)	No due date	Active 74 days
26140	EMC Emergency Room (CDM)	Active	Bud Admin (badmin)	No due date	Active 74 days
26320	EMC 3 West (CM_NonLabor)	Active	Bud Admin (badmin)	No due date	Active 74 days
26340	EMC CCU (Staffing)	Active	Bud Admin (badmin)	No due date	Active 74 days
26610	EMC 6A (JobCode ADC)	Active	Bud Admin (badmin)	No due date	Active 74 days
26611	EMC Home Health	Active	Bud Admin (badmin)	No due date	Active 74 days
27200	EMC Radiology - MRI (JobCode)	Active	Jeff Goldstein (JGoldstein)	No due date	Active 74 days
27215	New Radiology Department	Active	Tom McCarthy (TmcCarthy)	No due date	Active 74 days
101010	EMA Internal Medicine (Provider Detail)	Stalled			Error occurred while generating p
101020	EMA Internal Medicine (Provider Summary)	Active	Bud Admin (badmin)	No due date	Active 74 days

Step Activity 101010 (EMA Internal Medicine (Provider Detail))

9/19/2019 09:07 Step 2 (Budget Owner Input) stalled after error on activation
Error occurred while generating process tasks for step 'Budget Owner Input'. Details: Invalid assignment - user 'Test User' does not have rights to 'DEPT 101010'.

12/2/2019 14:45 Step 2 (Budget Owner Input) stalled after error on activation
Error occurred while generating process tasks for step 'Budget Owner Input'. Details: Invalid assignment - user 'Test User' does not have rights to 'DEPT 101010'.

OK

Questions and Answers

Please send suggestions for future webinars to

ClientRelations@kaufmanhall.com