Keeping XCM Up-to-Date
Process Guide

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Keeping Your XCM Site Up-to-Date

By keeping your XCM database up-to-date your client and task information will provide you with the most up to the minute information. Ensuring all settings and defaults throughout your site reflect the current year’s information and it allows for faster movement and less clicks throughout the site. In turn, XCM will save you and your staff valuable time.

1.0 Managing Firm Settings

Within the Manage Firm Settings and Defaults utility, you should confirm you have the most up-to-date Assembly/Shipping defaults, Category, Period End Date, and Fiscal Year. The assembly and shipping method selected will default on their respective pages and apply to new tasks going forward. The fiscal year should reflect the current financial year of tasks. Lastly, the category and fiscal year will not only default on the search page but also within utilities and reports.

![Image of XCM Firm Settings]

2.0 Verify/Update Default Task Filing Method

Within the Manage Task Type utility ensure that all default filing methods are current. If the default filing method should be efile, and is currently listed at paper you can update that information within this utility. Simply select the task type so it is highlighted in blue then click to select and go to the Task Filing Method Default drop down and make your selection, and click on update to apply the information.
3.0 Verify/Update Client Data

The Manage Client utility allows users to add or edit client information, individually or in bulk. Keeping your client database updated is important when creating tasks on the fly or when tracking client information.

To add a new Client, go into the Manage Clients Utility and click on “Add Client”. It is important to include the Primary Task Type, Responsible Person, and the Fiscal Year End for task creation purposes. Once you have filled in all the fields, click “Save” to add the new client into your database.

If any existing clients need their Primary Task Type or Fiscal Year End populated, this can be updated individually on the Client Details Page or in bulk. To update individually click directly on the client’s name, to update in bulk select the clients (checking the boxes to the left of their names) and populate the filters on the right side of the page. Make sure to select “Apply Changes” to apply the new or edited information to the client details.

It is also essential to include your clients email addresses and phone numbers. This information is important because it pulls directly into the issues and points page of a task as well as the electronic routing sheet. When a question is posted you can quickly either call the client (there phone number will be posted in the upper right hand corner of the page) or send them a quick email. By selecting “Create Email” XCM will not only pre-populate the questions you wish to send but also the email address, saving you the time to look it up.

Lastly, you should review your active client list by running the Clients Details report. This can be found within the Administrator Reports in the reports section. Although you cannot delete clients in XCM, you can mark them as Inactive. Pre-Busy Season you should review your Active Client List in XCM and make sure to mark any clients that have left the firm as Inactive. By marking a client as inactive it prevents any current tasks associated with the client from moving forward (rolling over and recurring). You will not lose any of the Inactive Clients Task information.
4.0 Verify/Update Group Data

The Manage Group utility is used to create and manage client groups. To add a new Group, click on “Add Group”. Clients can be listed in multiple groups at the same time. If you wish to add additional clients to an existing group, search and select the group you would like to add the users to (click directly on the group’s name to highlight it), and click “Edit”. Within the Edit Group Page, select “Choose Client” to select additional clients to add to the group. In order to view Group details in bulk, you can run the Group Details report.
5.0 Manage Staffing Assignments

Within the Manage Staffing Assignments utility you should update staffing for any terminated or promoted staff so when tasks begin to move through your workflow they are pushed to the appropriate users.

Your first step is to search based on the Client Database or Active tasks to narrow down your search on clients/tasks that require staffing changes. After you have chosen how you want to Find & Replace, select the person you want to replace by selecting the “Choose” button to locate the user. There are additional filters that you can utilize to help narrow down your results. Once all of the necessary fields have been populated, select “Search” to bring up your search results.

Once you have your search results, select the person to replace the current staff with, select the responsibility, and select the clients/tasks you want to apply these changes to. The “Replace Staff Assignment only; ignore Replace From” Search will replace staffing regardless of who was in the position beforehand. The “Apply Change to both Client Database and Active Tasks” option will make the staffing changes on both the client database and active tasks.
6.0 Manage Users

The Manage User utility will allow your firm to update user settings and disable any terminated employees. Pre-busy season it is important to ensure that all user rights and details are up-to-date to avoid a delay in processing. The User Details report will show you the current user rights assigned to each user as well as other details. After reviewing the report, go into the Manage Users utility to update any user rights or add additional details to the user’s profile. Within the Utility you should also disable any users that may have left the firm recently.
7.0 Bulk Manage User Groups and User Rights

The Bulk Manage User Groups and User Right Utility will allow you to bulk apply user rights and user settings to multiple users at the same time. Your first step is to create the user right groups. You can only use one user right per-group. By standardizing your user rights into groups, managing new employees in XCM will result in faster setup time. Once you have setup your user right groups you can then bulk apply them to your employees. The Utility will list your steps for you.
8.0 Delete Tasks & Purge Data

Within the Delete Tasks and Purge Data Utility, you have the ability to delete unnecessary tasks and permanently remove specific information from tasks in bulk such as Shipping, Assembly, and Review Points. By Purging and deleting your unneeded information/tasks your XCM database will be better organized and up-to-date for your upcoming busy season.

You can only delete tasks in the status of No Info In, NLC, No Longer Task/To be Deleted, and Recurring. When purging task information, tasks must be in the status of Completed. Within the utility, search for the tasks you would like to purge or delete, then select them and click either Delete Task(s) or Purge Data in the dark purple bar.
9.0 Creating Tasks

The Create New Tasks utility allows you to create tasks for any new clients that you added previously. You can also utilize the Quick Search to show all clients that do not have a task created for their primary task type, for a specific year and originating location. First search for the clients you would like to create a task for by using the filters. Once you have your results, click on “Create Task” to create your tasks in bulk.
10.0 Rollover

The Rollover Tasks utility allows you to bulk rollover tasks from the prior year. It is a Best Practice to include Assembly, Shipping, Knowledge, and Checklist when rolling over tasks. However, every firm is different. It is important to discuss with your firm what information should be carried forward with the tasks. It is also imperative to never rollover a task that recurs, such as Estimates, Monthly Payroll tasks, etc.

Within this utility you can also utilize the “Quick Search” option, which will show all tasks which have not rolled over from the previous year to “2012” with a specific location “HQ”. This option ensures that you do not miss any tasks to be rolled over.

Similar to other utilities you must first search for the tasks you would like to rollover by using the search filters, then select the task(s), and click on Rollover Task. This will provide you with a pop up where you will be able to select what information you would like to carry forward.
11.0 Automatic Rollover (Auto rollover)

The Rollover utility allows you to manually select what tasks you would like to carry forward. The AutoRollover features will automatically rollover your statutory filings the moment they are moved to the completed status. XCM will automatically rollover these completed tasks at Midnight, every night. This saves your firm time because you will no longer have to manually bulk rollover your annual filings. *Note: You should never turn on the AutoRollover function for task types that have recurrences associated with them. Never use the AutoRollover for Daily, Monthly, Quarterly, etc. tasks. Also, although you can turn the AutoRollover feature on in bulk, you can only edit them on an individual basis.

In order to turn on the AutoRollover feature you need to select the Manage Task Type Utility. Once in the utility your first step is to select what task types you would like to turn on the AutoRollover feature for. To make your selection, check the box to the right of “Task Type Code” twice. This will clear all check boxes to the left of the task types. Now, you can select the task types you want to turn the AutoRollover on. Once they are selected (check the box to the left), click on “Auto Rollover”. Select what information you would like to carry forward, choose the new period end date for the rolled over task (Annually), and decide whether you want to pull staffing from the previous task or from the Client Database. Your final step is to select “Apply”. You will now see an orange “On/Edit” link to the tasks Auto Rollover settings.
Once you have selected your task types, click on "Auto Rollover."
12.0 Summary

Update Firm Default Settings
- Within the Manage Settings and Defaults Utility:
  o Update Default Settings

Verify Default Filing Methods
- Within the Manage Task Type Utility:
  o Update Default Filing Method

Update Client Information
- Within the Manage Client Utility:
  o Add new clients
  o Ensure all clients have a Year End, Primary Task Type, Email Address, and Phone number
  o Disable inactive clients

Update Group Information
- Within the Manage Group Utility:
  o Add new groups
  o Add clients to existing groups and Remove inactive clients from groups
  o Disable inactive Groups

Update Staffing Assignments
- Within the Manage Staffing Assignment Utility:
  o Update Staffing in the client database and active tasks for any terminated or promoted staff.

Manage Users
- Within the Manage User Utility:
  o Update User Details and User Rights

Bulk Manage Groups and User Rights
- Within the Bulk Manage Groups and User Rights Utility:
  o Create User Right Groups

Deleting Tasks & Purge Data
- Within the Delete Tasks and Purge Data Utility:
  o Delete unnecessary Tasks which include tasks in No Info In (for clients that are marked as inactive), No Longer Task/To be Deleted, and NLC.
  o Purge all unneeded information such as review points.
Create New Tasks
- Within the Create New Task utility:
  - Create tasks for any new clients which you have added to XCM.
  - Run the Quick Search to view any clients which do not have their primary task created.

Rollover
- Within the Rollover Task Utility:
  - Rollover your completed tasks

AutoRollover
- Within the Manage Task Type Utility:
  - Turn on the AutoRollover for your annual task types