

## Year Over Year Comparison Report–Cross Check Tasks

The XCM Power BI application offers complete analytics for tasks through its powerful reporting feature. The Year Over Year Comparison report in the Power BI Analytics shows a comparison of tasks in the current year and previous year for different status groups.

### Some Questions Related to Data Verification in Power BI reports

#### Who do I contact when I see discrepancies in my report?

1. If you see discrepancies in your report, refer the cross-referencing guide to troubleshoot your report.
2. If the **Task Counts** do not match, contact an XCM Data Analyst and inform them about the difference between the two numbers. If possible, provide them with an example of a missing task.
3. You can check if there is a discrepancy in the data by comparing the task count in the report and the result of an **Advanced Search** in your XCM site.



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*This process needs to be conducted on a weekly basis for the Modified Standard and YoY Master Comparison reports.*

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#### How do I fix my report when I see blanks?

1. Click on the **Mapping** tab and check your status mapping if you see blanks. Find the missing statuses, group them into the appropriate status group, and send them to your Data Analyst.
2. If there are no blank statuses, take a screen shot of where you see the blanks and send it to an XCM Data Analyst with a brief description of the report and blanks. Blank status mappings can cause pauses or failed refreshes.

#### What do I do when my report has not refreshed during a scheduled time?

There are several things that can cause a failed refresh.

1. The most common are transient issues that fix themselves during the next refresh.
2. The second most common are unmapped statuses. Unmapped statuses can simply be fixed by sending the blank statuses and the associated status group to an XCM Data Analyst.

When your report does not refresh during a scheduled time, contact an XCM Data Analyst and inform them of the last time your report refreshed. They will then look into the likely causes and provide feedback when the report has been fixed.

Do you have any questions about this document or about XCM training options?

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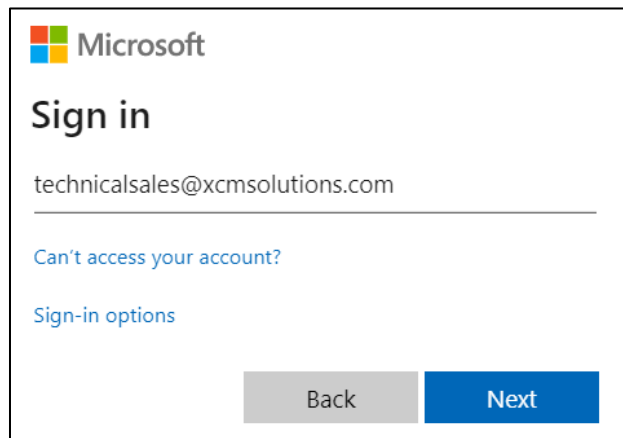
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## How can I check/verify my data in XCM with Power BI?

Use the **Advanced Search** in your XCM Site and set the parameters pertaining to the report you are viewing. The detailed parameters for each specific report can be found in the XCM Analytics process guides for cross checking data [INSERT HYPERLINK]. If the numbers do not match, contact an XCM Data Analyst.

## How to Access the Power BI Application

Log in to Power BI and sign in with your registered Email ID and password.



Microsoft

### Sign in

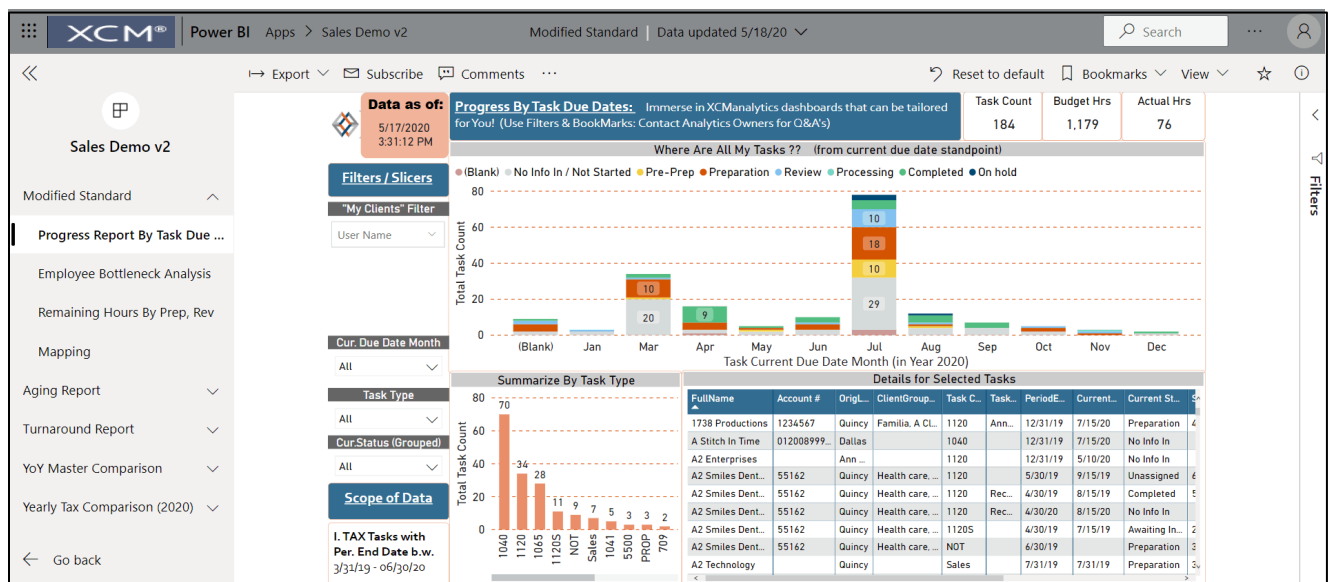
technicalsales@xcmsolutions.com

[Can't access your account?](#)

[Sign-in options](#)

Back Next

Upon successful login, the following Power BI home page is displayed.



You can now access the reports from the left pane of your home page. The reports give detailed analytics aided by useful filters to customize them.

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## Check for Consistency with XCM tasks

There is a need to cross-check the data in the analytics with the task data in your XCM account for the following reasons.

1. To ensure that the Tasks in the Year Over Year Comparison report are consistent with the data in your XCM Account. Such a consistency check confirms that the Year Over Year Comparison report is accurate and up-to-date.
2. To enable the Analytics team to diagnose and resolve problems quickly and efficiently when a pre-check of the task count has already been performed.

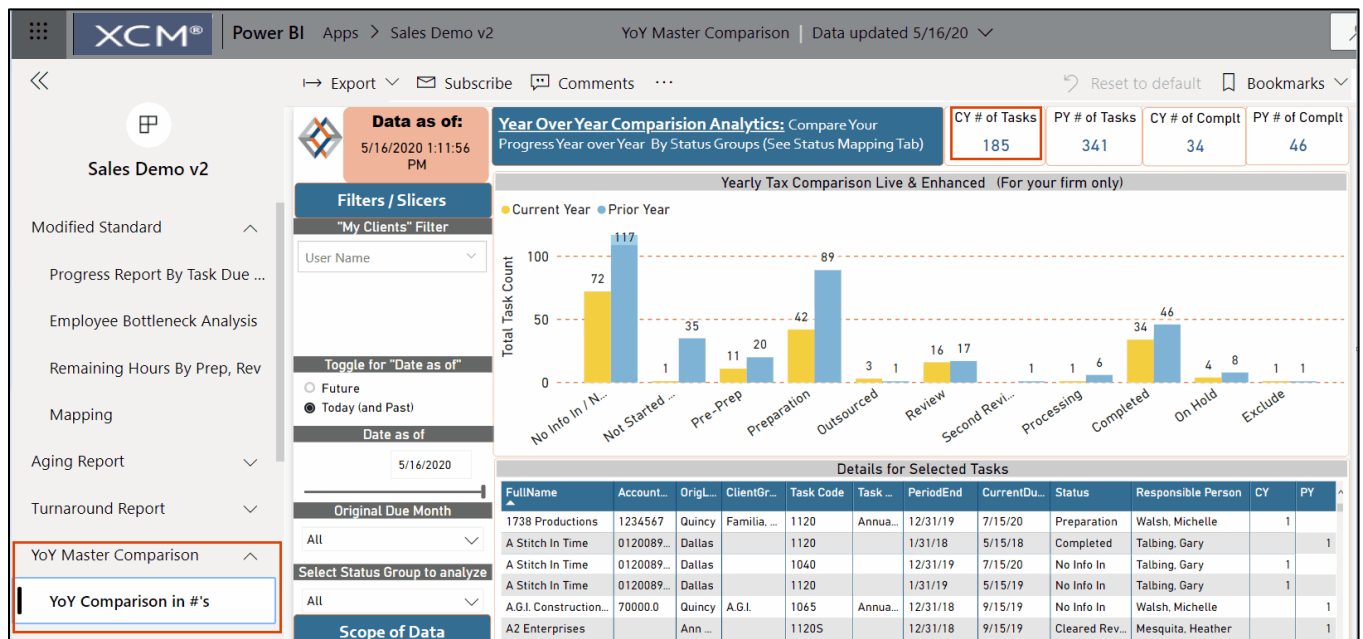
As a best practice, it is advisable to check for consistency periodically to ensure that the report retrieves the correct and most recent data.

## Procedure to Cross Check Tasks

To be able to check if the tasks that are displayed in the analytics are the same as the tasks in your XCM account, you can follow the procedure given below.

### Step 1

Access the **YoY Master Comparison>YoY Comparison in #'s** report from the left pane of your home screen. Make a note of the **CY # of Tasks** that is displayed in the top bar.



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## Step 2

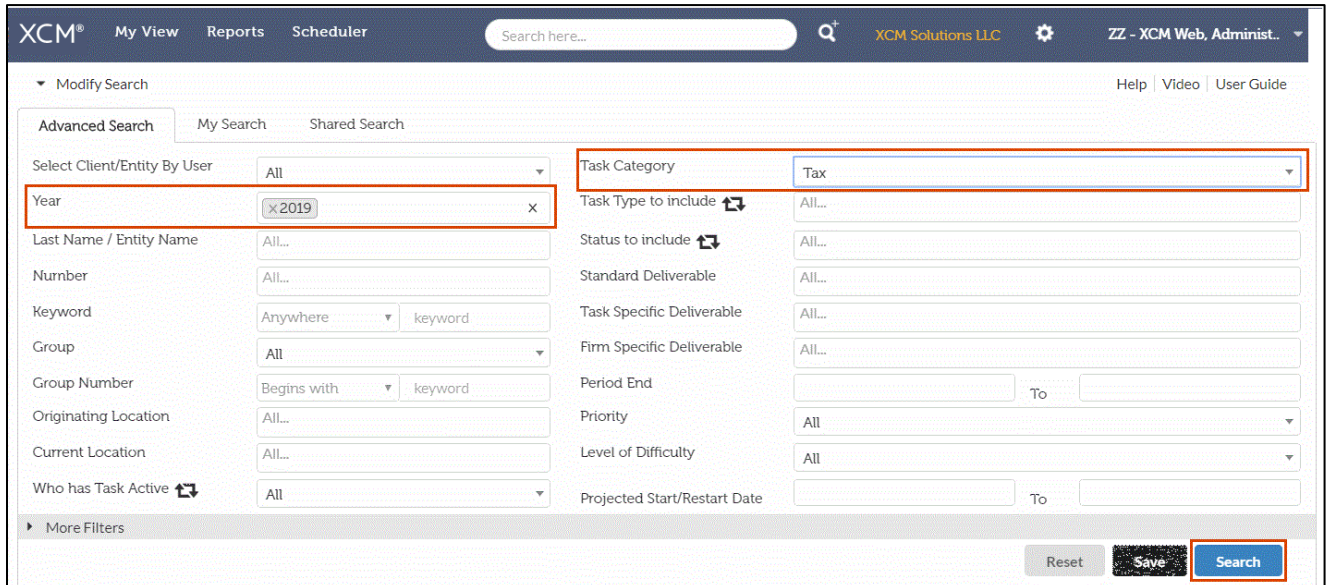
Log in to XCM and click on the **Advanced Search** icon from the top bar.



## Step 3

Perform an **Advanced Search**. The following criteria serve as an example.

1. Set the **Year** filter to **2019**.
2. Select **Tax** from the **Task Category** drop-down.




*You can save the search with the specified criteria to quickly run subsequent search queries.*

## Step 4

Make a note of the number of tasks fetched in the Search Results as indicated in the figure below.

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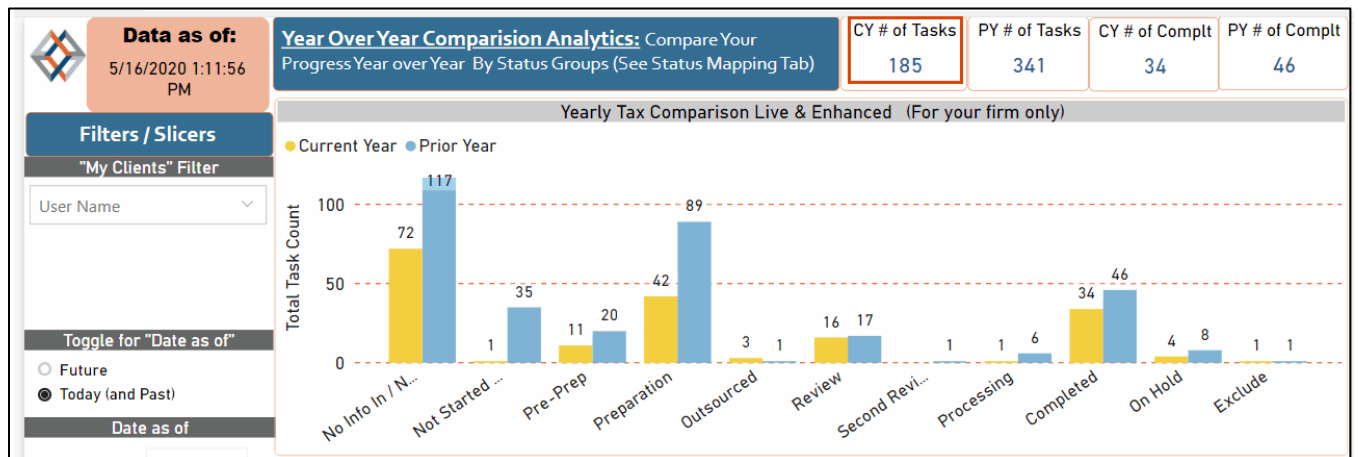
Modify Search Help | Video | User Guide

SEARCH RESULTS - 185 of 185 
↺
↻
⌵
⌶
⌷
+ ADD TASK

	Client/Entity	Number	Type	PED	Cat.	Desc	Status	Start Date	Due Date	Last Move	Last Chg
1	<a href="#">1738 Productions</a>	1234567	1120	12/31/19	TX	Annual C	Preparation	04/14/20	07/15/20	04/14/20	04/16/20 09:05:30
2	<a href="#">A Stitch In Time</a>	012008999...	1120	01/31/19	TX		No Info In		05/15/19	03/04/19	03/04/19 04:48:52
3	<a href="#">A Stitch In Time</a>	012008999...	1040	12/31/19	TX		No Info In			04/16/20	04/16/20 11:43:12
4	<a href="#">A2 Enterprises</a>		1120	12/31/19	TX		No Info In			01/24/19	03/25/19 10:25:46
5	<a href="#">A2 Smiles Dental Gro...</a>	55162	1120S	04/30/19	TX		Awaiting Info	02/19/19	07/15/19	06/06/19	06/06/19 04:08:02
6	<a href="#">A2 Smiles Dental Gro...</a>	55162	NOT	06/30/19	TX		Preparation	03/24/19		03/24/19	04/23/19 12:25:31
7	<a href="#">A2 Smiles Dental Gro...</a>	55162	1120	04/30/19	TX	Recurring	Completed	05/14/19		05/14/19	05/14/19 02:26:29
8	<a href="#">A2 Smiles Dental Gro...</a>	55162	1120	05/30/19	TX		Unassigned	06/04/19	09/15/19	06/04/19	06/11/19 02:13:08
9	<a href="#">A2 Technology</a>		Sales	07/31/19	TX		Preparation	03/24/19	07/31/19	03/24/19	03/24/19 09:02:54
10	<a href="#">A2 Technology</a>		Sales	01/31/19	TX		No Info In		01/31/19	02/12/19	02/12/19 11:15:04
11	<a href="#">ABC Corporation</a>	a001	T5	01/16/19	TX		NLC	10/31/19	02/28/20	04/16/20	04/16/20 11:47:54
12	<a href="#">ABC Corporation</a>	a001	1040	12/31/19	TX		No Info In			04/16/20	04/16/20 11:24:11
13	<a href="#">ABC Industries</a>	1023.4	1120	12/31/19	TX		Review	11/21/19	07/15/20	04/17/20	04/17/20 03:41:06
14	<a href="#">ABC Utilities</a>	254713	1120S	12/31/19	TX		No Info In		03/15/20	01/14/19	01/14/19 12:53:39
15	<a href="#">Able, Jake</a>	JABLE.0	1040	12/31/19	TX		No Info In			04/16/20	04/16/20 11:24:11
16	<a href="#">Abrams, Bruce</a>	234567	T1	12/31/19	TX	Canadian	No Info In		06/01/20	07/24/19	07/24/19 12:59:25
17	<a href="#">Adams, Zachary M.</a>	10010.0	1040	12/31/19	TX		No Info In	06/15/20		02/04/20	02/04/20 02:51:11

## Step 5

Compare this count with the **CY # of Tasks** in the Power BI report.



A matching task count indicates that the data in the Year Over Year Comparison Report is accurate and reflects the most recent data.

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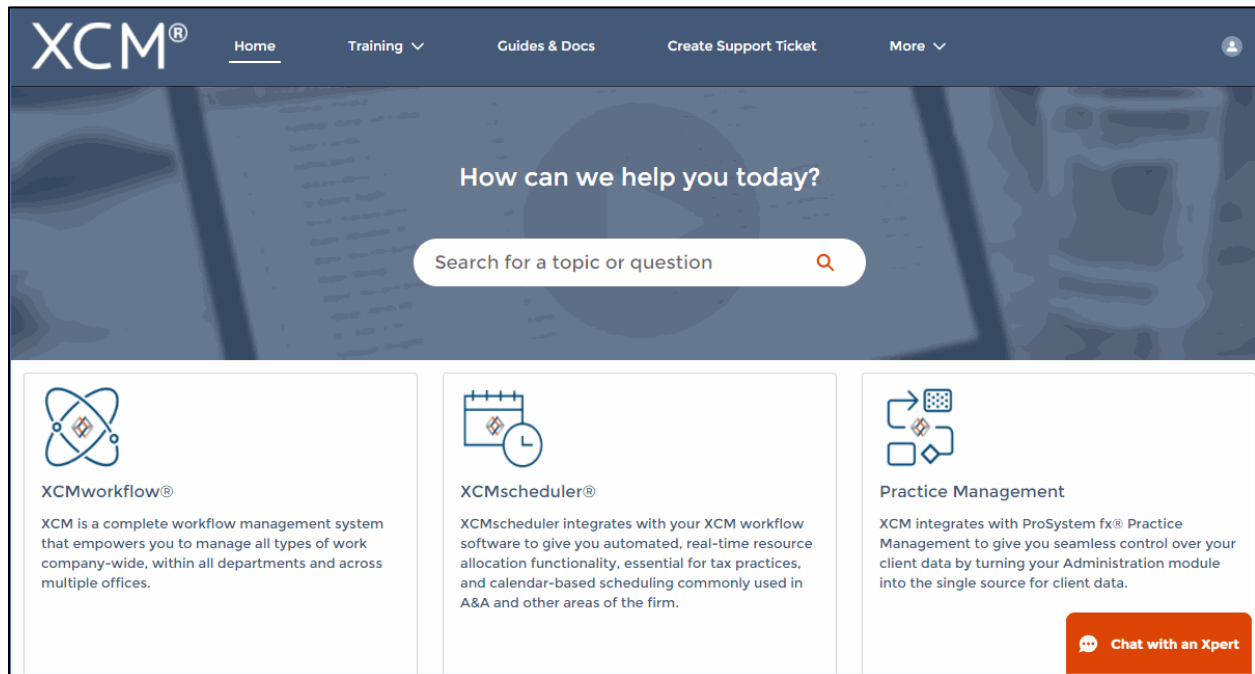
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## HELP CENTER

The Help Center is accessible directly from your firm's site through the Help link in the upper right-hand corner of your screen, providing access to User Guides, Training, and Support.



### Training

- XCM developed a comprehensive training program that empowers users to begin using the software quickly. Unlimited access to live web-based training highlighting key areas of functionality will help you and your team maximize the use of XCM.
- The schedule for the Web Based Training Sessions is available in the Help Center.

### Guides and Docs

- A library of on-demand Web Courses complements the live web-based trainings, with a focus on key functions and best practices. A full User Guide outlining all the relevant elements of the XCM software including all utilities and advanced functionality, as well as an overview of all the reports in XCM is also available.

### User Support

- XCM provides multiple levels of support including email responses, escalated phone support and interactive web-based support. Our support team utilizes Ring Central software that allows us to troubleshoot specific issues remotely and take control of users' desktops if required.

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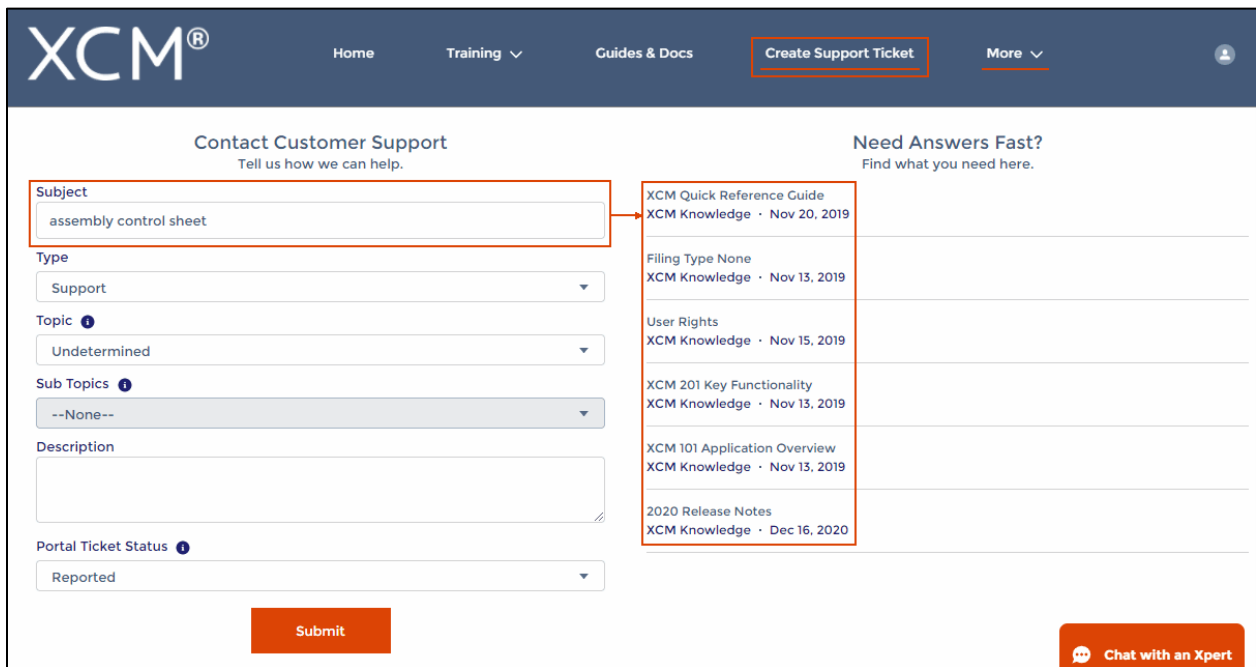
- XCM has a 95% success rate for responding to all online inquiries within 2 hours. Users are encouraged to submit a request to create a **Support Ticket** with the description and type of support required. For faster response, an online **Chat** help is available between 9 a.m. and 5 p.m. EST, Monday through Friday.
- Users can also submit all inquiries to [support@xcmsolutions.com](mailto:support@xcmsolutions.com), if your inquiry requires a direct response via phone or a remote meeting, your ticket will be escalated to the appropriate client service representative. Support hours are 7:00 a.m.–10:00 p.m. EST, Monday through Friday, with extended support on Saturdays and Sundays from January 1–April 30.

### Some guidelines to Create a Support Ticket

In the **Create Support Ticket** page, the following levels of support are available.

#### 1. Preliminary assistance through Self Help Docs

When you type a keyword in the **Subject** field, related documents are displayed on the right side of the page. You can review these documents for first-level information on the topic you are seeking.



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## 2. Create a Support Ticket

A support ticket can be raised by providing the following information.

### Contact Customer Support

Tell us how we can help.

**Subject**

**Type**

Support
▼

**Topic** ⓘ

My View
▼

**Sub Topics** ⓘ

Task Information
▼

**Description**

Assembly details

**Portal Ticket Status** ⓘ

Reported
▼

Submit

Users can monitor the status of their open support tickets through the **Manage Support Ticket** option.

XCM®

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[Create Support Ticket](#)

More
^

Manage Support Ticket

Contact Us

⚙

📁 Tickets

Recently Viewed
▼
⬇

0 items • Updated a few seconds ago

⚙
📄
🔄
✎
👤
🔍

Case Number	Account Name	XCM Account #	Subject	Status	Date/Time Opened	Case Owner

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