

The questions below will help test your knowledge of the **XCM Utilities** capabilities and functionality.

Manage Users

1. How do I create a User?
2. Does changing a title/level in XCM under manage users reset user rights? (E.g. we had a change in various user rights for our staff. Many of them lost rights to reports, looking up clients etc.)
3. How do I deactivate a user? Can I deactivate users in bulk?
4. How would we add XCM mobile to someone's iPhone or iPad? We are using XCMv2
5. How do you change someone's Password using Manage Users?
6. What is the purpose of Must Change Password?
7. What are the mandatory fields for creating a user?

Manage Staffing Assignments

1. How do you replace a user to blank in Client Database and Active Tasks?
2. Is there a way to change the responsible person on clients in bulk, how?
3. How can I replace an inactive user using Manage Staffing Assignment? (e.g. we have had staff leave and have numerous tasks that need to be edited)
4. How do I choose multiple years while accessing Active Task?
5. How do I apply Staffing changes to the Completed tasks using this Staffing utility?

Change Password

1. Are there user rights associated to change the password utility? (I.e. they forget their password)?
2. Is there a function that we can select to force every user to change their password when they login in? (E.g. For security reasons we would like to do this moving forward every few months. If we ask them to do it themselves by selecting change the password we are not guaranteed they will do it.)
3. How long is the “forgot password” link valid for?
4. What special characters are allowed to create a password in XCM?
5. How can I reset my password if I forget it on my own?

Bulk Manage User Groups and User Rights

1. How do I assign new user rights to all employees? (e.g. I need to assign new user rights to about 80 employees, and can't figure out how to do it in bulk. Is there a way to do this, or do I need to do it individually?)
2. How do you create a group?
3. How do I edit a Group, add new Rights and apply it to the users in bulk?
4. How do I delete a Group in Bulk Manage User Groups and User Rights?

Manage Clients/Entities

1. How do you create a client?
2. Can I create a client using same name and number? (E. g. One with upper case and another one with lower case)
3. What are the mandatory fields to create a client in XCM?
4. What are the ways to deactivate the client?
5. How can I deactivate clients in bulk?
6. How do I bulk update groups in clients?

Manage Groups

1. How do you create a group?
2. How do you apply a created group to the client?
3. How do you delete a group?
4. How do you edit a group?
5. How do you enable or disable a group?
6. How do you bulk Disable Group?

Create New Tasks

1. How do you create tasks in bulk using the utility function?
2. What is the purpose of Quick Search in Create New Tasks utility?
3. What is the difference between this utility and the Add Task wizard? How do I add Clients to a newly created group?

Rollover Tasks

1. What is the functionality of Quick Search in Rollover utility?
2. What are the steps to manually rollover tasks in bulk?
3. How do you find the tasks that are marked as Do Not Rollover?
4. How do I Rollover the prior year Actuals as the Budget for the Current year?
5. How do I unmark the default “Firm Option Fields” from the Rollover setup?

Manage Recurring Tasks

1. How do I assign the recurring task to a person in the setup?
2. What does “CT and M” indicate on the Creation Type of the task?
3. How do I create a quarterly estimate using recurring tasks?
4. How do I create a Bi-Annual task setup using recurring tasks?
5. What is the process for deleting a Recurring Task?
6. What is purpose of Special Option under recurring setup?
7. I can't find a recurring task pattern in the recurring utility when I search?
8. How do I edit the recurring pattern?
9. How do I bulk edit the recurring setups?
10. How do I assign a Recurring tasks to a specific user by default in the Recurring Setup?
11. How do I generate the Recurring task before the Period End Date?
12. What is the difference between the Task “Description” in the Routing Sheet and Recurring setup “Task Description”?

Add/Delete Task Deliverables

1. How do I add Deliverables in bulk using Add/Delete Task Deliverables?
2. Can task specific deliverables be deleted in bulk through the Bulk Add/Delete Deliverables utility?
3. How do I delete a Deliverables in bulk using Add/Delete Task Deliverables?
4. When I delete a deliverable in this utility it is not removed from the list, what am I doing wrong?

Bulk Operations Status

1. How do I check the manually rolled over task being created or not? There are 3 ways to do this, list out.
2. How do I check another user's Bulk Operation Status?

Delete Tasks & Purge Data

1. How do I delete a task that is in the Preparation Status?
2. In which statuses do tasks need to be in to be deleted?
3. What are the steps to delete tasks in bulk?
4. I have a few tasks in the No Info In status with data to be purged, how can I do it?
5. What are the steps to Data Purge in bulk?

Restore Deleted Tasks

1. How long does a deleted task stay in the Restore Deleted Tasks utility?
2. How do I restore the deleted tasks?

Delete & Restore Deliverables

1. I deleted a deliverable in a task but it is still showing, why?
2. How can I restore a deliverable?
3. Is there a way to search for a specific task/deliverable in the Delete & Restore Deliverables utility?

Do you have any questions about this Training Module or about additional training options?
Visit our Help Center or Email support@xcmsolutions.com today!