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

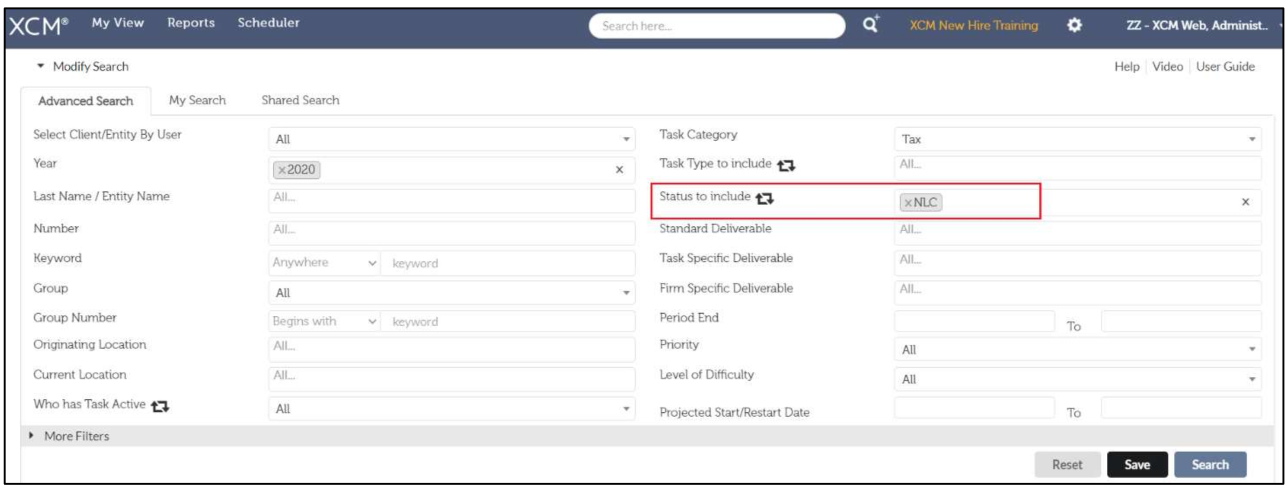
1. **How do I search for a task that has been moved to NLC?**

   You can search for the NLC task using the 'Status to include' filter under the Advanced Search page.

   Please follow the below steps:
   - Click on the Magnifier Icon on the top of the page (next to search text box)
   - Select the NLC status in the 'Status to include' filter and other required filters
   - Click on the 'Search' button to pull all the NLC tasks

   Note: If you would like to the tasks in excel, please click on the 'Export to Excel' option to see all the tasks in excel.

   Screenshot:



2. **Is there a way to run the advanced search for only active clients?**

   Currently, there is no option available to search only for the active clients. When you run a general search with a common filter like Year or Task Type, the active tasks of Inactive clients will also appear on the search result.

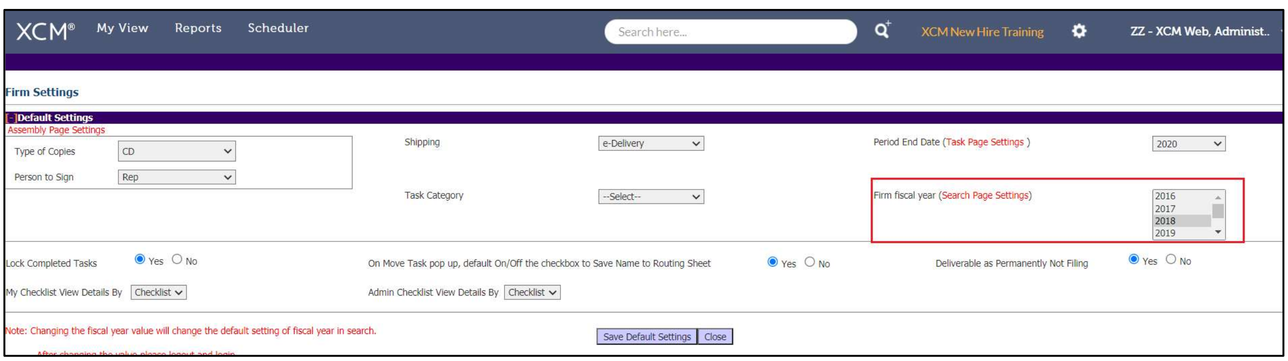
3. **In "Advance Search" - Is it possible to see the year 2018 populate automatically?** (e.g. Currently, anytime I have to pull up 2018 tasks I have to go in to "Advance Search" click the drop-down menuand choose "2018"?)

Yes, you can change the Default Fiscal Year under the Manage Settings & Defaults utility. It is a Firm-wide setting.

Please follow the below steps:
- Go to 'Manage Settings and Defaults' utility
- Under the Default Settings, you can see the 'Firm fiscal year (Search Page Settings)' select the required Fiscal Years [to multi-select hold on the CTRL button and click on the years]
- Click on the 'Save Default Settings' button
- Please log out and log in to see the changes

Note: To access the "Manage Settings and Defaults" utility, the user should have the 'Manage Settings and Defaults User Rights.

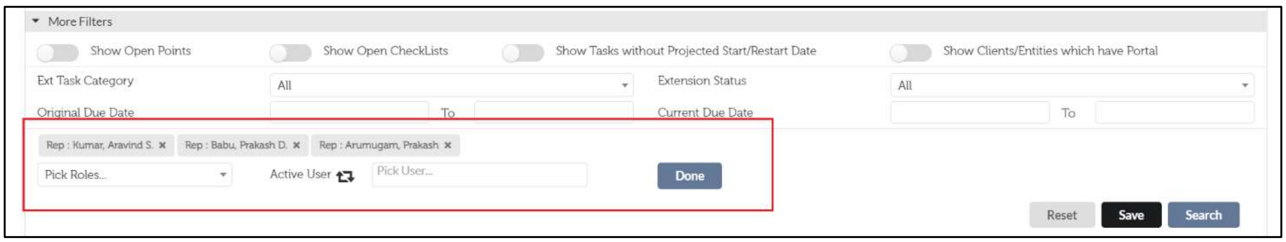
Screenshot:



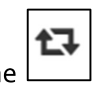
4. How do I search for multiple users in a specific Role in Advanced Search?

On the Advanced Search Page, please select the respective role name in the 'Pick Roles' drop down and search for the user in the 'Active User' filter and then click on 'Done' button under the More Filters Section in the Advanced Search to see the tasks which are assigned to the respective user roles.

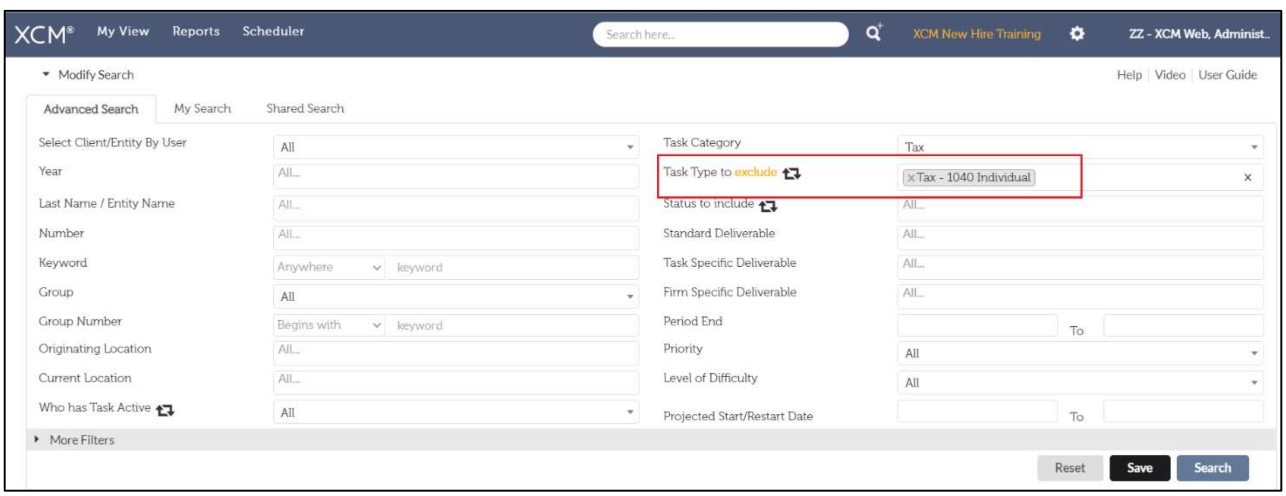
Screenshot:



5. Is there a way to exclude a particular Task Type and perform a Search?

Yes, you can select the required Task Type in the 'Task Type to include' filter and click on the  Interchange option to change the 'Task Type filter as 'Task Type to exclude' and click on the Search button. This will exclude the selected task type and list out the other tasks in the search results.

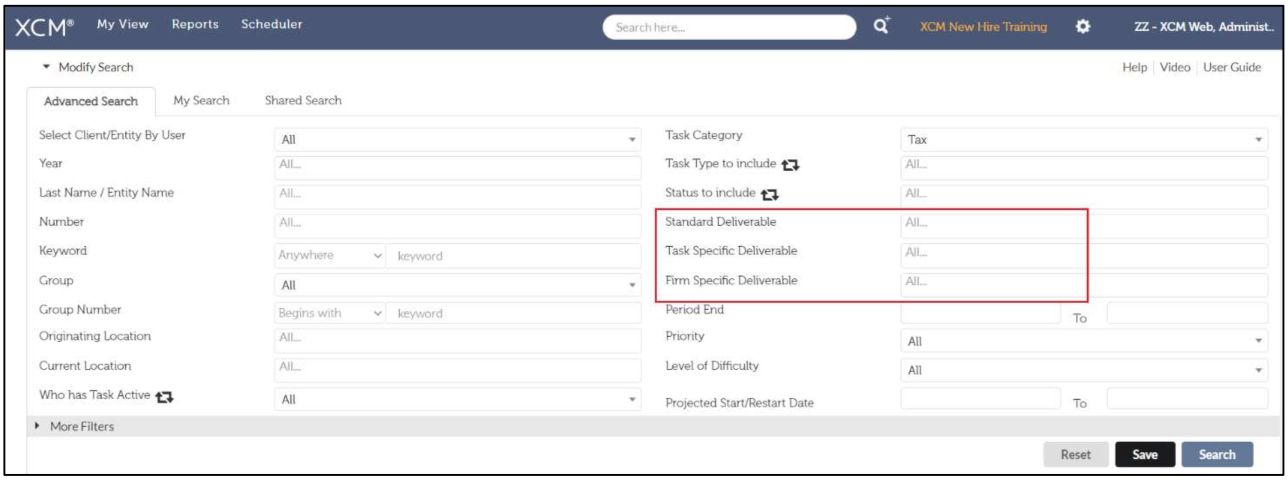
Screenshot:



6. Are there possibilities of searching tasks by their Deliverables (Standard, Firm Specific and TaskSpecific)?

Yes, if you would like to pull all the 'Task Specific Deliverables', you can use the Task-Specific Deliverables filter on the Advanced Search Page same for the 'Standard Deliverable' and 'Firm Specific Deliverable'

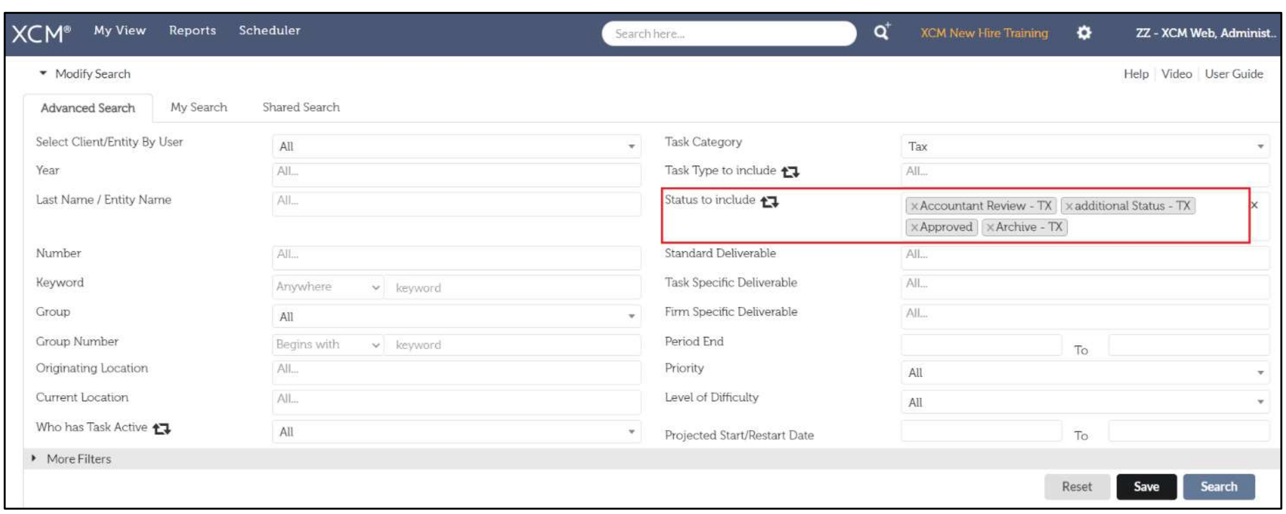
Screenshot:



7. Can I include only a few statuses to perform a search?

Yes, you can select the required statuses on the 'Status to include' filter and click on the 'Search' button to see all the selected statuses in the results.

Screenshot:

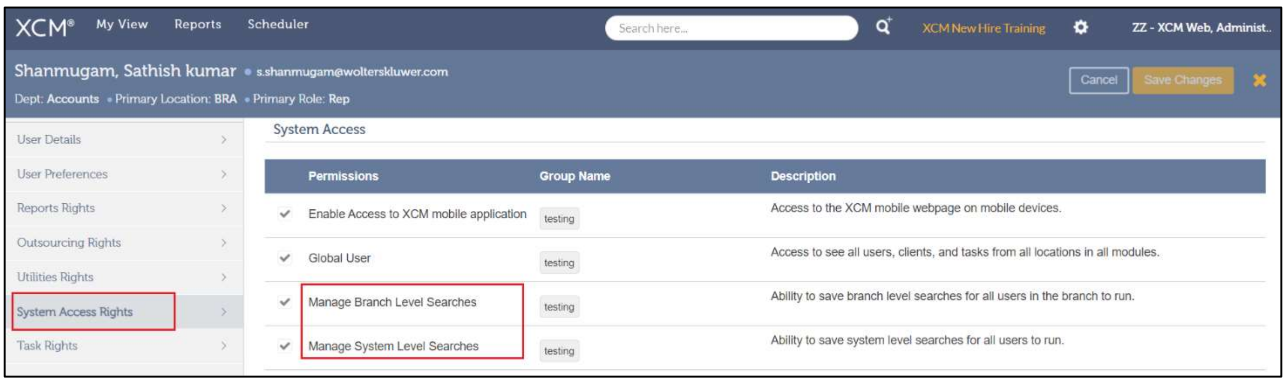


8. **Is there any permission needed to Save a Search by Branch/Firm level?**

Yes, the user should have the 'Manage Branch Level Searches' and 'Manage System Level Searches' User Rights to save the Branch level and Firm Level search under the Advanced Search Page.

Note: If the user doesn't have the user rights, the user need to contact the firm Web Admin to provide the User Rights.

Screenshot:



9. **How do you delete a Saved Filter in XCM?**

You can delete the Saved filter using the Trash Icon under the 'My Search' or 'Shared Search' on the Advanced Search Page.

Screenshot:

10. **How do I edit an existing Saved filter?**

You can edit the Description by clicking on the Pencil  icon under the 'My Search' and 'Shared Search' tab, but you cannot edit or rename the Search Name for the Saved Filters. You need to delete the Saved Filters and re-create with the appropriate name and filters.

Note: To edit the Branch level and Firm Level search, the user should have the 'Manage Branch Level Searches' and 'Manage System Level Searches' User Rights.

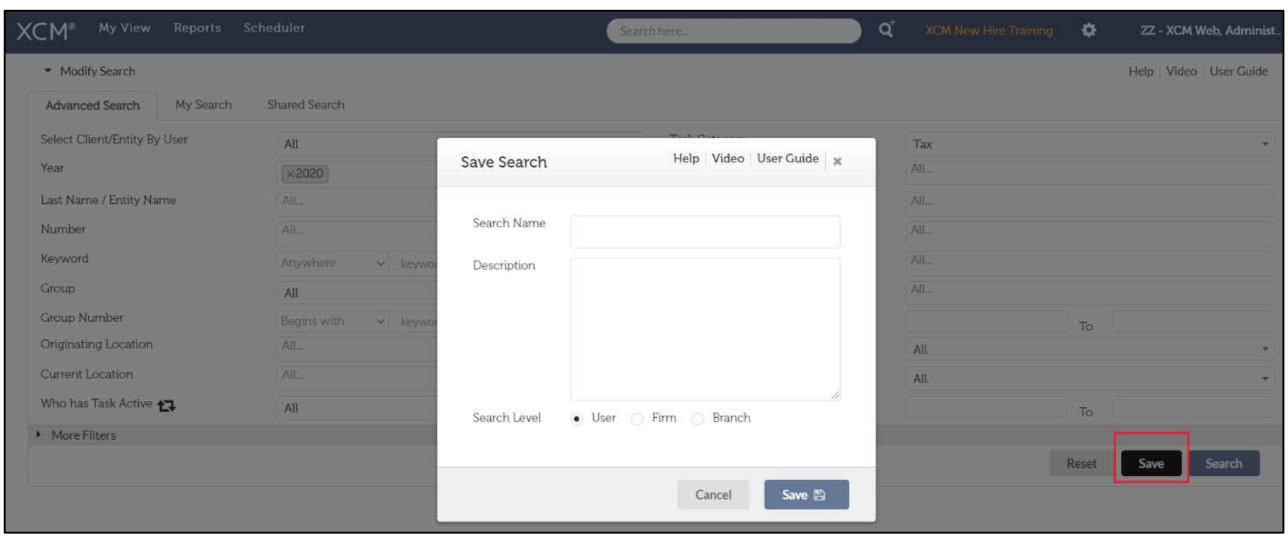
11. What are the steps to save a search firm wide?

Please follow the below steps:
- Click on the Magnifier Icon on the top of the page (next to search text box)
- Select required filters on the filters page
- Click on the 'Save' button
- Enter the 'Search Name' and 'Description' on the required fields
- Select the 'Firm' radio button in the 'Search Level' option
- Click on the 'Save' button

Note: If you are trying to save the Search with same name already exists under the User Level or Branch Level or Firm Level, it won't save.

For example: A saved search called XXXX already saved under Saved Search (User Level) by another user, you can't use the same name XXXX to save a search under the Shared Search - User/Branch/Firm Level. Please add any additional character or use different name to save the search.

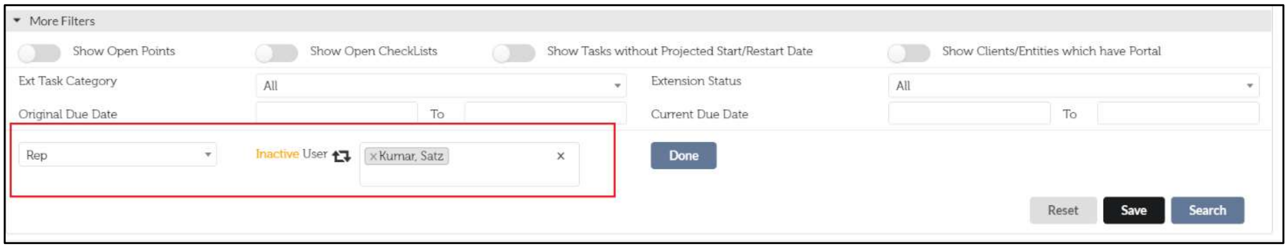
Screenshot:



12. Can I search for the tasks that are currently assigned to an Inactive user?

Yes, you can search the inactive user tasks. On the Advanced Search Page, please select the respective role name in the 'Pick Roles' drop down, click on the Interchange option to change the Inactive and search for the user in the 'Inactive User' filter and then click on 'Done' button under the More Filters Section in the Advanced Search to see the tasks which are assigned to the respective user roles.

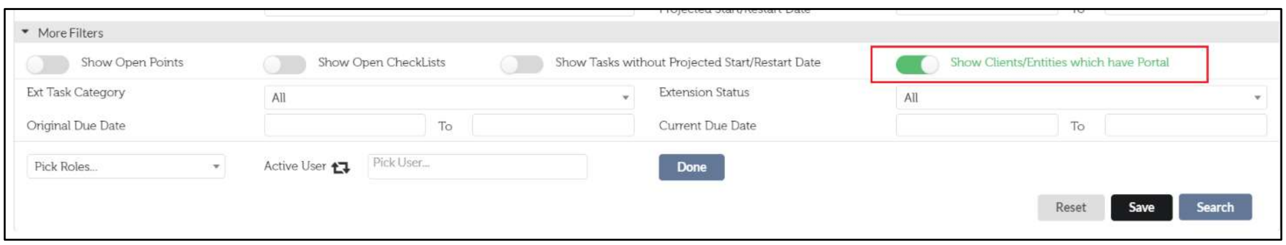
Screenshot:



13. How do I search for client tasks that have Portal?

On the Advanced Search Page, please enable the 'Show Clients/Entities which have Portal' option and click on the Search button under the More Filters Section in the Advanced Search to see the clients who have portal.

Screenshot:

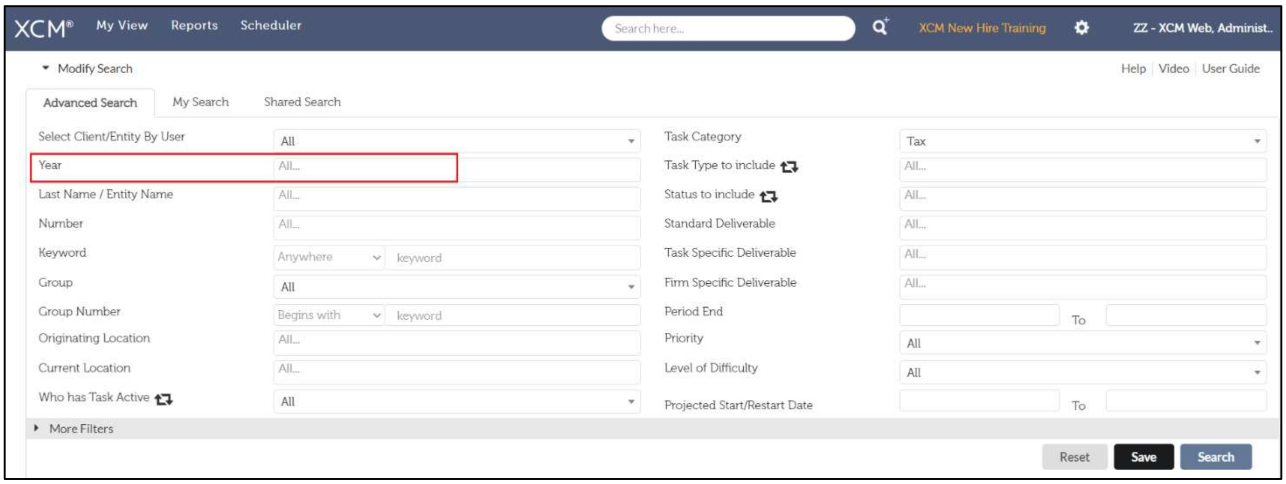


14. How do I Search the tasks prior to the year 2013?

You can search for the tasks by selecting 'All' in the Year filter and other required filters in the Advanced Search option and click on Search button to pull all the tasks.

Sort the search results by clicking on the PED column to get the desired results. XCM is designed to show before and after 5 years from the current year.

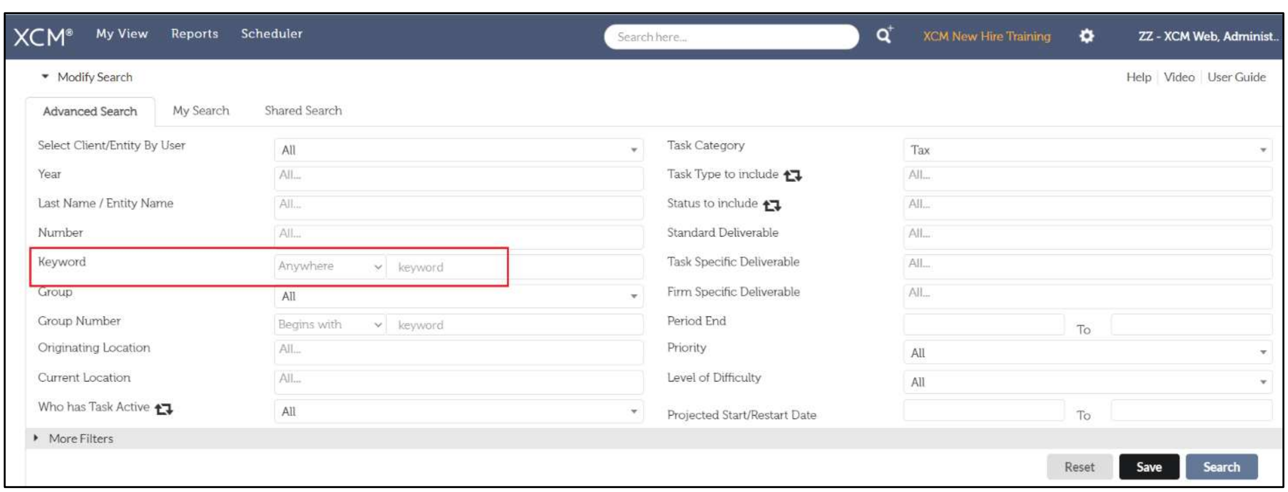
Screenshot:



15. How do I search inactive client tasks in XCM without reactivating the clients?

You can find the active tasks for the inactive clients using the Keyword field on the Advanced Search Page, this will pull inactive client tasks.

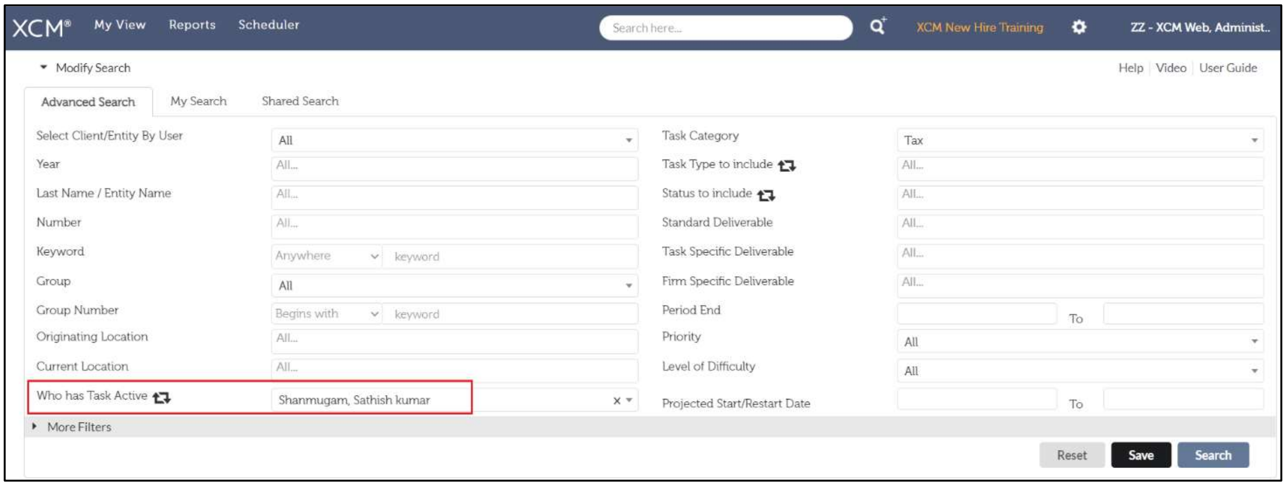
Screenshot:



16. Can I search for the tasks that are currently assigned to a specific user?

Yes, you can use the 'Who has Task Active' filter to see the tasks which are assigned to the user.

Screenshot:



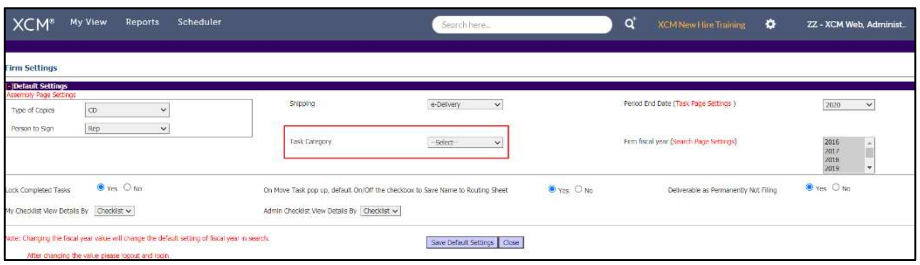
17. Can I set the Task Category as 'ALL' by default?

Yes, you can change the Default Task Category under the Manage Settings & Defaults utility. It is a Firm-wide setting.

Please follow the below steps:
- Go to 'Manage Settings and Defaults' utility
- Under the Default Settings, you can see the 'Task Category' please select the '– Select –' option in the drop down
- Click on the 'Save Default Settings' button
- Please log out and log in to see the changes

Note: To access the "Manage Settings and Defaults" utility, the user should have the 'Manage Settings and Defaults User Rights.

Screenshot:



If you would like to enable this feature for the User Level, you can use the Manage Users utility.

Please follow the below steps:
- Go to Manage Users utility
- Search for the user
- Click on the username (blue color hyper link) to view the User profile
- Click on the 'User Preferences' section on the left pane
- Select the required Category on the Default Category option
- Click on the 'Save Changes' button
- Please log out and log in to see the changes

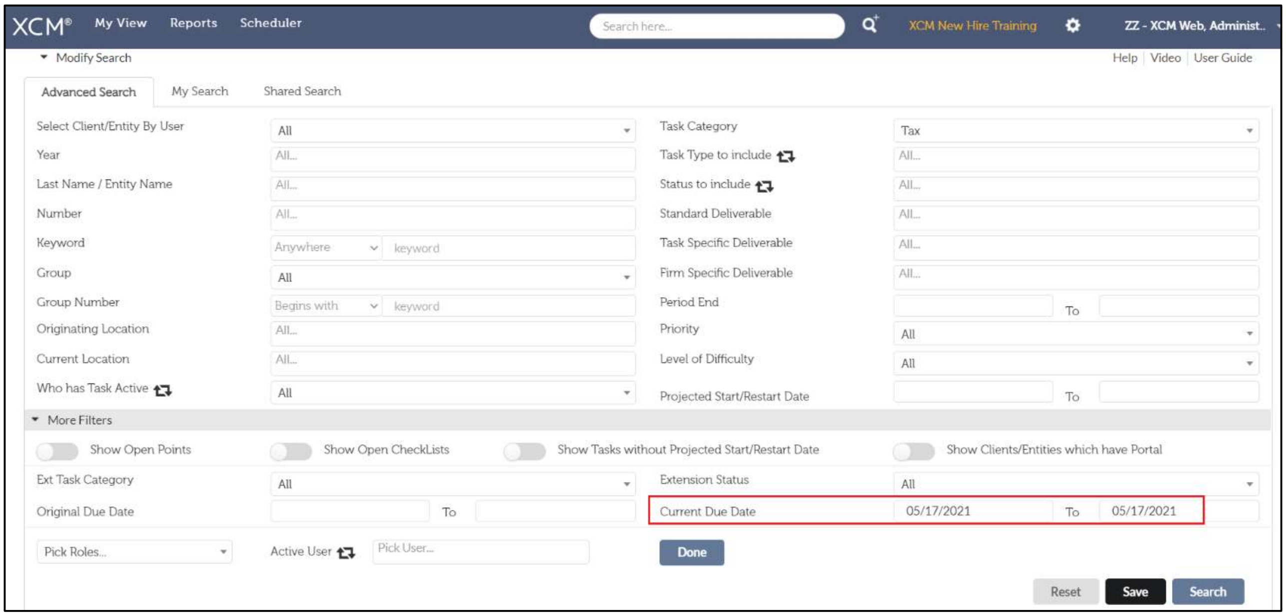
Note: To access the "Manage Users" utility, the user should have the 'Manage User' User Rights.

Screenshot:

18. Can I use the search to find tasks that are currently due?

On the Advanced Search Page, please select the date in the 'Current Due Date' filter and click on the Search button under the More Filters Section in the Advanced Search to see the tasks which are in due.

Screenshot:



19. I can't find any tasks for client ABC when I use the Quick Search, but I know we have some for 2018.

If you firm hasn't selected the year 2018 as default then Quick Search will not show up the task when you search by client. Please use the Advanced Search and select the required Year and click on search to get the task.

20. Can I use the search to find tasks that are on extension?

On the Advanced Search Page, please select 'IP' in the 'Extension Status' filter and click on the Search button under the More Filters Section in the Advanced Search to see the tasks which are in active extension.

21. **After I do a search can I add criteria to it - if so how?**

Yes, you can add the filters by clicking on the 'Modify Search', Add the filters and click on the 'Search' button to the see the results.

Screenshot: