vExchange Dashboard Troubleshooting and Analytics

Presented by Joe Cross

vExchange®

The Mastermind Series

Presented by VERTICAN TECHNOLOGIES

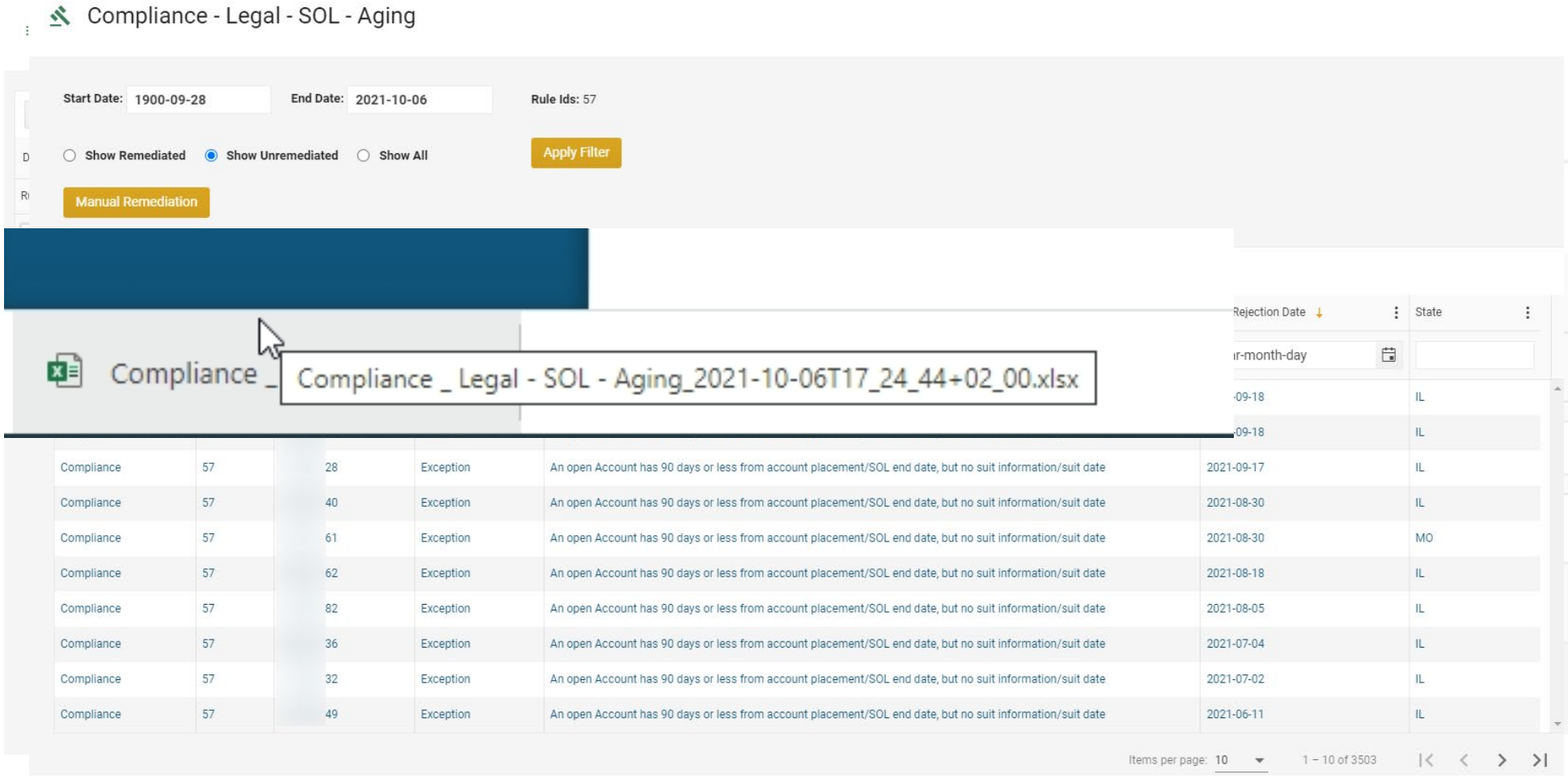
Today's Agenda

- A walk-through of common troubleshooting scenarios
- Analytics discussion
- Q&A

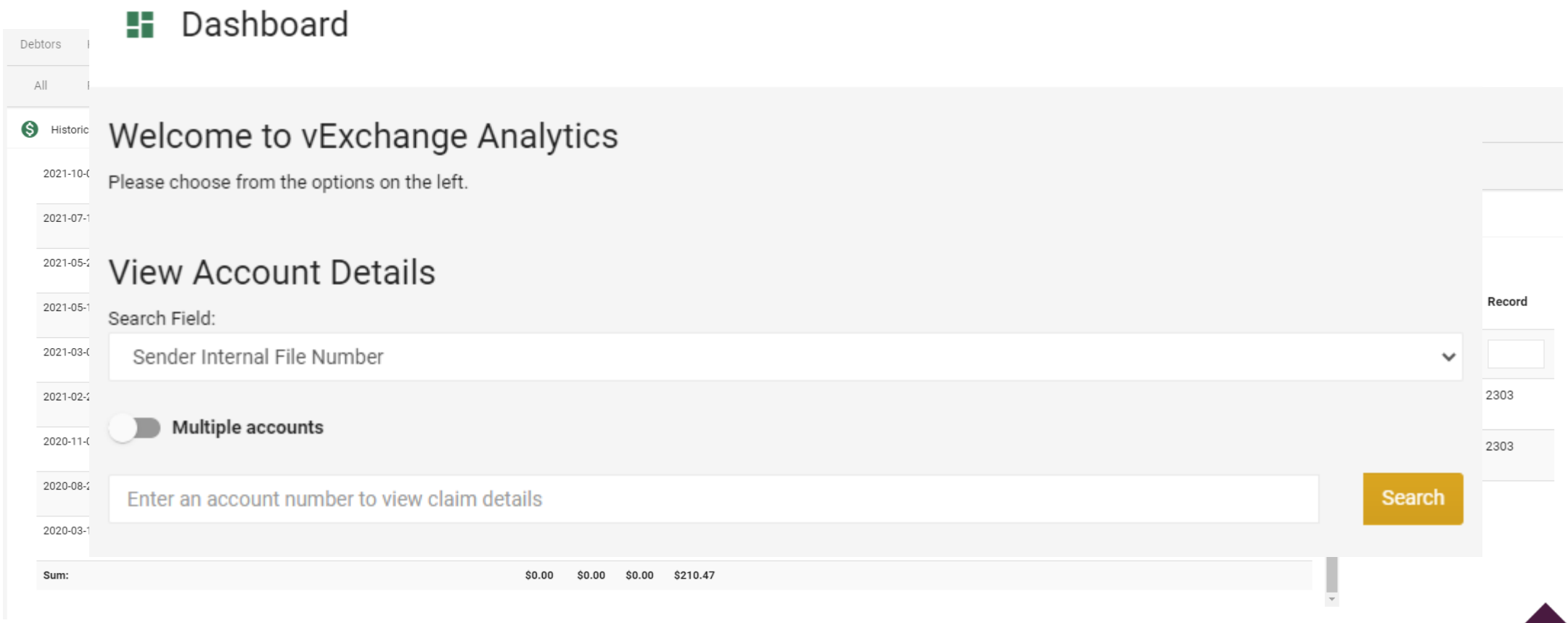
Common Scenarios

- How do I remediate my rejections quickly?
- Why don’t my payments reconcile with other parties?
- How do I know if my files have been processed?

Bulk Remediation



Financial Reconciliation



File Status – CMvX standard

Logs

Start Date: 2021-10-11 End Date: 2021-10-12 Apply Filter

Export visible Export all *Maximum 500k

Source	File Name	Path	Start	End	Report	Row Count
			year-mont...	year-mon...		
Encrypt_Decrypt.Encrypt	b3pmntr_ _20211012113105_001.txt	\\vtaz-apps-01\ftproot_vtapps01\vExchange\CM\Collection\ \Production\ \CACS\fromVertican\	2021-10-12 11:40:07	2021-10-12 11:40:07	file has been encrypted - Success	0
Encrypt_Decrypt.Encrypt	b3pmntr_ _20211012113105_001.txt	\\vtaz-apps-01\applications\vExchange\BusinessAdapters\Collection\CM\ \Archives\fromVertican\	2021-10-12 11:40:07	2021-10-12 11:40:07	file has been archived - Success	0
Encrypt_Decrypt.Encrypt	b3pinput_ _2021101211 3030_001.txt	\\vtaz-apps-01\ftproot_vtapps01\vExchange\CM\Collection\ \Production\ \CACS\fromVertican\	2021-10-12 11:40:06	2021-10-12 11:40:06	file has been encrypted - Success	0
Encrypt_Decrypt.Encrypt	b3pinput_ _2021101211 3030_001.txt	\\vtaz-apps-01\applications\vExchange\BusinessAdapters\Collection\CM\ :\Archives\fromVertican\	2021-10-12 11:40:06	2021-10-12 11:40:06	file has been archived - Success	0
b3pLogs	b3precon_CACSvExUpdateToCACS_Prod		2021-10-12 11:33:03	2021-10-12 11:33:03	End 00:00:03.1866667	0
b3pLogs	b3precon_CACSvExUpdateToCACS_Prod		2021-10-12 11:33:00	2021-10-12 11:33:03	Insert to b3precon table	2151
b3pLogs	b3precon_CACSvExUpdateToCACS_Prod		2021-10-12 11:32:59	2021-10-12 11:33:00	create temp tables	17593
b3pLogs	b3precon_CACSvExUpdateToCACS_Prod		2021-10-12 11:32:59	2021-10-12 11:32:59	Create #RecordMaster_CM	2152
b3pLogs	b3precon_CACSvExUpdateToCACS_Prod		2021-10-12 11:32:59	2021-10-12 11:32:59	Start	0
b3pLogs	b3pmntr_CACSvExFinancialToCACS_Prod		2021-10-12 11:31:04	2021-10-12 11:31:04	Generate b3pmntr_ _20211012113105_001.txt	7

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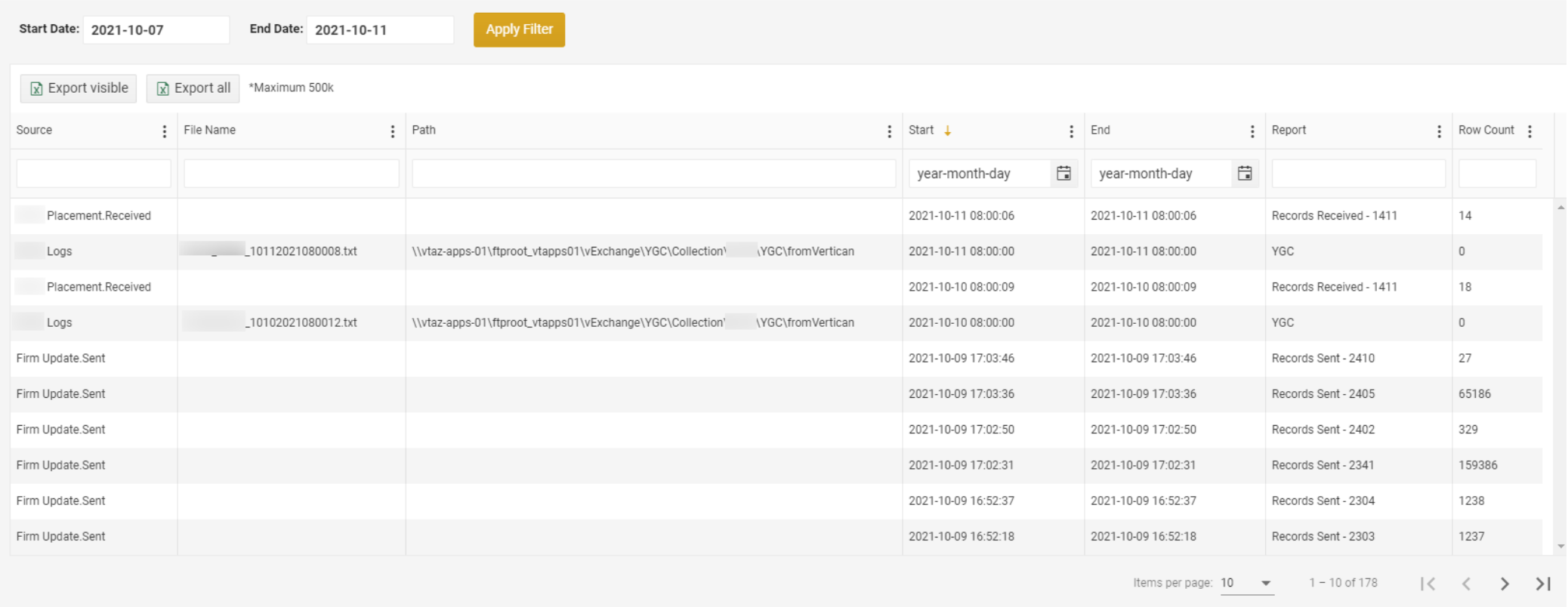
File Status – YGC standard

Logs



Start Date: 2021-10-07 End Date: 2021-10-11 Apply Filter

Export visible Export all *Maximum 500k

Source	File Name	Path	Start	End	Report	Row Count
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Placement.Received			2021-10-11 08:00:06	2021-10-11 08:00:06	Records Received - 1411	14
Logs	_10112021080008.txt	\\vtaz-apps-01\ftproot_vtapps01\vExchange\YGC\Collection\ \YGC\fromVertican	2021-10-11 08:00:00	2021-10-11 08:00:00	YGC	0
Placement.Received			2021-10-10 08:00:09	2021-10-10 08:00:09	Records Received - 1411	18
Logs	_10102021080012.txt	\\vtaz-apps-01\ftproot_vtapps01\vExchange\YGC\Collection' \YGC\fromVertican	2021-10-10 08:00:00	2021-10-10 08:00:00	YGC	0
Firm Update.Sent			2021-10-09 17:03:46	2021-10-09 17:03:46	Records Sent - 2410	27
Firm Update.Sent			2021-10-09 17:03:36	2021-10-09 17:03:36	Records Sent - 2405	65186
Firm Update.Sent			2021-10-09 17:02:50	2021-10-09 17:02:50	Records Sent - 2402	329
Firm Update.Sent			2021-10-09 17:02:31	2021-10-09 17:02:31	Records Sent - 2341	159386
Firm Update.Sent			2021-10-09 16:52:37	2021-10-09 16:52:37	Records Sent - 2304	1238
Firm Update.Sent			2021-10-09 16:52:18	2021-10-09 16:52:18	Records Sent - 2303	1237

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File Status – QvX standard

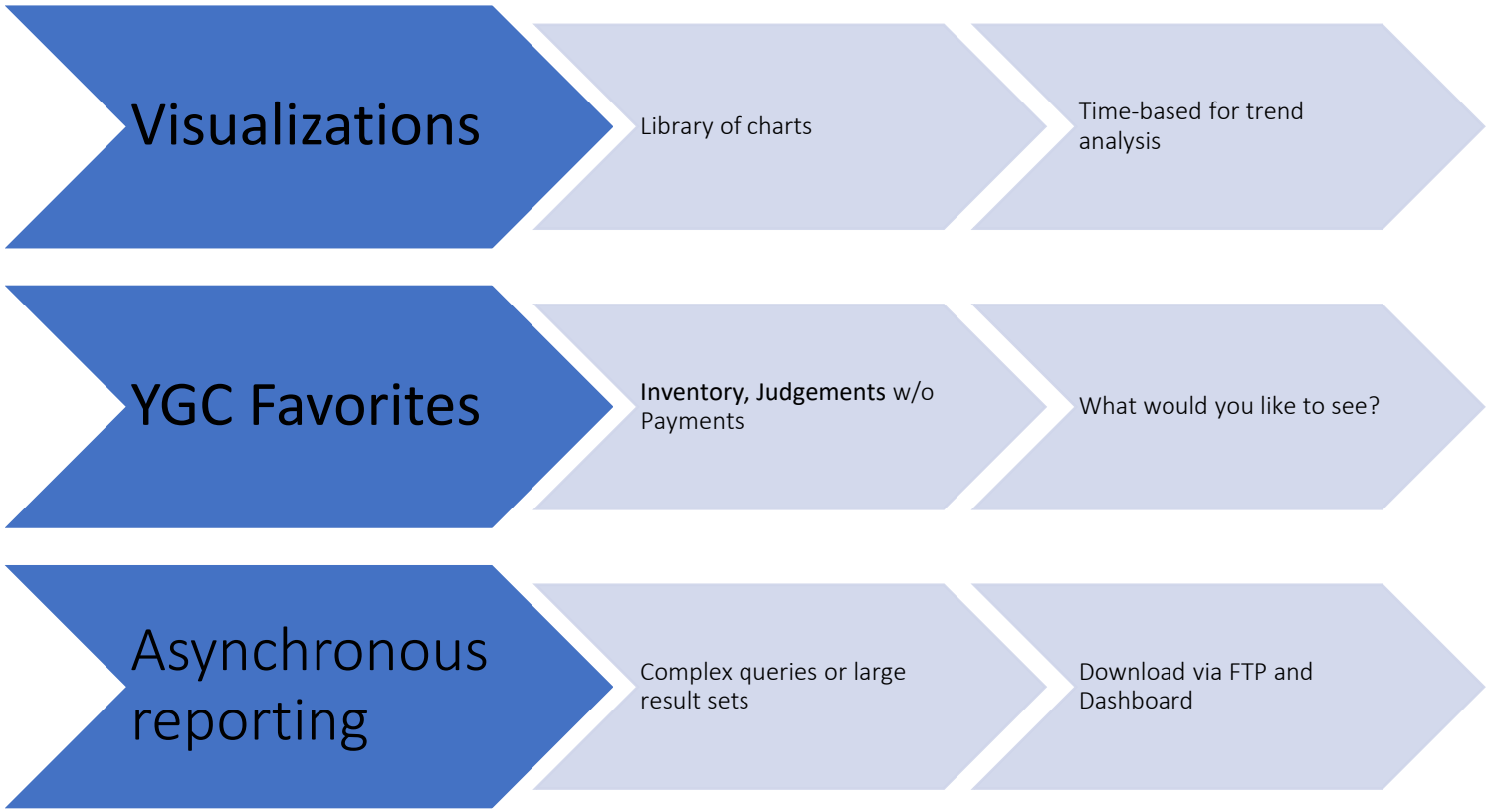
Logs

Start Date: 2021-10-11 End Date: 2021-10-12 Apply Filter

Export visible Export all *Maximum 500k

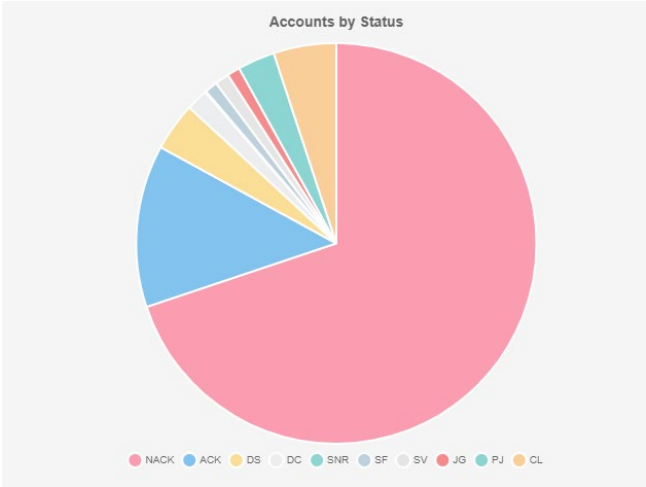
Source	File Name	Path	Start	End	Report	Row Count
			year-month-day	year-month-day		
Placement.Received			2021-10-12 08:02:09	2021-10-12 08:02:09	Records Received - 1411	3
Placement.Received			2021-10-12 08:01:43	2021-10-12 08:01:43	Records Received - 1405	9
Placement.Received			2021-10-12 08:00:42	2021-10-12 08:00:42	Records Received - 1410	5
Placement.Received			2021-10-12 08:00:36	2021-10-12 08:00:36	Records Received - 1405	36
Placement.Received			2021-10-12 08:00:28	2021-10-12 08:00:28	Records Received - 1301	3

Analytics Now and Going Forward

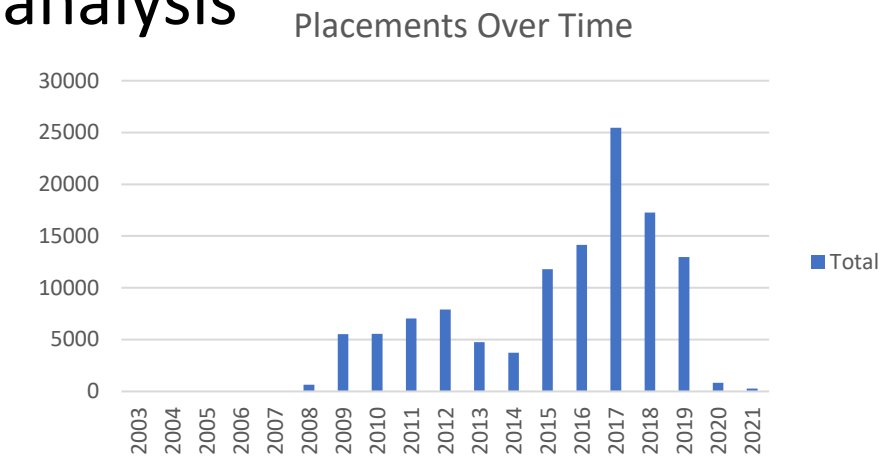


vExchange and the Dashboard continue to evolve based on client feedback and business need. Over time, some of the underlying technologies may change.

Visualizations



- First phase – pie charts on Landing page
  - Rejections by Firm and by Rule
  - Accounts by Status
- Second phase – time-based charts for trend analysis
  - Placements/Rejections/Performance over time
- In the future
  - Embedded charts on reports and result sets
  - Comparisons of your firm against averages



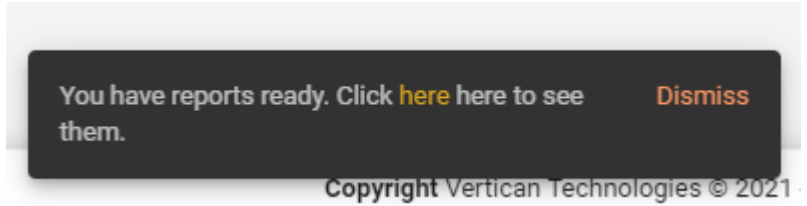
YGC Favorites

- Migrating most-used (and most-requested!) reports from YGC website to Dashboard
  - Key Events
  - Inventory
  - Judgements w/o Payments
  - Legal Lifecycle
- Your input can help us improve them, not just copy them

What do you want to see?

Asynchronous Reporting

- Driven by complex queries/filters and result sets over 1M rows
  - All Rejections, Placements, Ageing, Advanced Search
- Requests will be queued and delivered later
- Download result files via FTP or Dashboard



Date of Creation	Date of Execution	Report Name	Query
2021-10-06	2021-10-06	Key Litigation Report	AgentIds: , From: 2021-10-05 00:00:00, To : 2021-10-06 23:59:59
2021-10-06	2021-10-06	Key Litigation Report	AgentIds: , From: 1900-10-05 00:00:00, To : 2021-10-06 23:59:59

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Questions

If you have any questions or if your firm requires any additional users created, you may address these requests to:

IMPLEMENTATIONS@VERTICAN.COM