XCMscheduler lets you take action, using real-time data to drive resource allocation and calendaring, and helping you schedule clients and staff quickly, maximize utilization and exceed client expectations.

XCMscheduler leverages data from your XCMworkflow® to provide automated, real-time resource allocation functionality and calendar-based scheduling—all in one central repository.

Effectively manage resources and staff your client engagements with the appropriate people.

XCMscheduler provides immediate access to scheduling by task or employee, using task history and data to forecast future workload. Comprehensive User Profiles allow you to quickly narrow down availability based on role, skill level, location, niche, work assigned, anticipated work, as well as budgeted or remaining hours, to more efficiently and effectively manage your team.

**XCM Resource Allocation Scheduler (RAS)**

XCM RAS offers real-time, fully automated resource management and scheduling for the short-term or current period. Users can take any deliverable less than 10-15 hours out of a static Microsoft® Excel file, and put it into a dynamic, centralized platform, where it can be assigned and tracked through tasks within a workflow. This provides management with visibility to current staff workload, across a department or the entire firm.

With just a few clicks, the XCM Resource Allocation Scheduler empowers you to assign work in real time. It lets you find availability based on role, skill level, work assigned, anticipated work, and budgeted or remaining hours. XCM RAS provides a snapshot of all of the work as it comes in the door, and allows managers to allocate work to resources without picking up the phone, scheduling meetings, or printing obsolete Excel files.

Because staff are working within XCMworkflow, the RAS is automatically updated in real time—providing management with up-to-date information they can use to better manage their staff.

XCM RAS is fully customizable to any department within a public accounting firm or business.
XCM Calendar-Based Scheduling (CAL)

While the XCM Resource Allocation Scheduler controls work that is less than 10-15 hours, XCM Calendar-Based Scheduling controls larger, more complex work that needs to be scheduled in the future.

XCM CAL offers two ways to schedule larger projects: by resource, or by task. With this visibility, individuals and managers can see blocks of time that indicate whether or not staff has availability, as well as identify resources who are overloaded to balance workloads for better engagement.

XCM CAL helps you assign projects that have a specific timeframe, based off of the beginning and end point, according to the number of hours required of various staff roles, skill levels, and expertise.

- Different color assignments help you identify opportunities to assign staff to new projects at-a-glance.
- Filters are available to help you narrow down available resources with the skill sets required for a project.
- Click-and-drag functionality lets you move a booking from one timeframe to another if rescheduling is required.
- Daily, weekly, or monthly views are available to allow you to schedule the way you want to schedule your staff.

To learn more about how XCMsheduler can increase productivity in your firm or tax department, contact us at 781.356.5152 or visit our website at xcmsolutions.com today.