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XCMscheduling

XCM Solutions

XCMscheduling is the first complete scheduling package tightly integrated with a workflow automation system, empowering firms to dynamically manage teams and schedule work across all areas of the firm. Having visibility into who has what now, what's coming and what's anticipated based on history – and the ability to act on that knowledge in real-time – that's a powerful management tool that helps firms more effectively and efficiently manage work schedules, and anticipate future staffing needs. XCMscheduling integrates with the XCM workflow software to provide both automated, real-time resource allocation scheduling (RAS) functionality, essential for tax practices, and calendar-based scheduling, commonly used in A&A and other areas of the firm.

Because it's integrated with the XCM database, XCMscheduling brings an unprecedented level of automation to scheduling processes – giving users real-time access to all information related to the jobs, staffing, work status and time tracking. It also taps into XCM's User Profile to help users easily match work requirements with appropriate staff based on role, level of experience and specialty areas.

Another advantage of having scheduling tightly integrated with workflow is the ability with the RAS to dynamically monitor staff needs based on work in progress according to the firm's mapped workflows. Users can quickly see scheduling conflicts and staff availability, now and in the future, and act on that information to ensure appropriate staffing levels and optimum utilization.

Having all of the information automatically updated in real-time in a single system ensures greater accuracy and streamlines scheduling processes.

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entire team at once for the new dates and either easily reschedule that job for another time, choose a new staff member based on job requirements that is available, or dynamically reassign or move the work in conflict to a new person or time – all from a single view within the system.

XCMscheduling is the only complete scheduling package integrated with a workflow management system that empowers firms to:

- Dynamically assign work based on current and anticipated availability – according to role, experience, and expertise
- Foresee and quickly address potential staffing and/or scheduling conflicts
- Empower partners and managers to balance team workloads • Plan out busy periods in advance!

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