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Overview

Resource Allocation Scheduling, also known as Tax Scheduling, is scheduling that concentrates on present time (as opposed to future time, which is known as Calendar-Based Scheduling). It is the ability to determine how busy people are today, who is overloaded with work, who needs work, and who is available to do the work that just came into the office, allowing the firm to effectively allocate work across multiple levels of people and multiple levels of Tasks.

Up until now, Resource Allocation Scheduling, for lack of proper tools, has been an inefficient, time-consuming process, consisting of manually prepared Microsoft Excel® spreadsheets that require constant updating from week to week. In addition, lengthy weekly or bi-weekly partner/manager ‘Horse Trading’ meetings, required to discuss how to reallocate resources to most effectively address changing needs, consume a tremendous amount of staff, manager, and partner hours, wasting what would otherwise be billable time.

In an effort to be more efficient, often firms try to use their Calendar-Based Scheduling application to manage the Tax Scheduling process. These attempts often prove ineffective because the volume of tax returns flowing through the office, and the speed that these tax returns need to get done, is too great to be managed through Calendar-Based Scheduling.

The XCM Resource Allocation Scheduling (XCM RAS) module addresses the above challenges by automating the manual process of scheduling resources and providing real-time status information. XCM RAS is the first scheduling solution on the market that is fully integrated with a workflow solution. As work progresses through a firm’s XCM workflow, XCM RAS is instantly updated, allowing the firm to schedule and easily assign work based on real-time information, simply with the click of a button. XCM RAS also gives partners and managers instant access to current work and its status, eliminating the need for time-consuming management meetings.

The XCM Resource Allocation Scheduling module is designed to:

- Save firms a tremendous amount of time by avoiding the manual process of producing and updating spreadsheets
- Free partners and managers from having to waste valuable billable time tracking current work status
- Provide real-time access to what resources are available, based on employee profiles
- Enable real-time management capabilities for allocating work among employees, clearly identifying staff that is over-burdened or underutilized
- Ensure that as work moves through the XCM preparation workflow process, XCM RAS is automatically updated with current information
- Provide partners and managers real-time over/under budget analysis of the Tasks for which they are responsible
1.0 XCM RAS Requirements

The XCM Resource Allocation Schedule module has extensive logic built into its functionality in order to make it as automated and efficient as possible. As a result, there are two basic requirements that firms need to meet.

Mapping XCM Workflows
The first requirement is that the Task Types controlled by XCM RAS need to have their workflows mapped to establish its basic logic. Since all of XCM RAS information is derived from the routing sheet (Task page) and the particular Status that the Task is in, workflow mapping is what establishes the relationship between the Task Status, the staffing Roles on the routing sheet, the Users assigned to the Roles, and the related budgets (actual and remaining time associated with the Roles), so that they can be accurately reflected in XCM RAS.

To learn how to map workflows, please consult the XCM Version 10.0 User Guide and videos in the Help section of XCM.

Capturing Time Within XCM
The second essential element required to make XCM RAS an effective tool is the need to accurately capture time within XCM. XCM RAS is all about time: budgeted time, actual time, and especially, remaining time. Determining remaining time on work assigned to Users allows the person scheduling work to see who is overloaded, who has free time, and based on that information, easily reallocate work among staff members.

XCM allows you to track Budgeted Time and Actual Time directly on the routing sheet (Task page). Some firms use this feature comprehensively, while other firms have never used XCM to capture time. However, in order for XCM RAS to work properly, it’s imperative that Tasks accurately reflect the Budgeted Time and Users consistently post their Actual Time to the Task as well. XCM RAS will only be as accurate as the captured time data, and that is controlled by firm Users.

Make sure you train your firm Users about XCM RAS and its capabilities, and reinforce with them your firm’s dependence on accurate XCM time entry.

2.0 Configuration Decisions

The following points should be considered as you set up XCM RAS:

To which Users will you give access to XCM RAS? XCM RAS is controlled through User rights, so you can easily specify who has access to XCM RAS and who can impact the scheduling.

Which staffing levels or roles do you want to control through XCM RAS? Many firms control the staff and senior levels in tax scheduling, but do not schedule partner/manager levels. Other firms may want to schedule at all levels. With XCM RAS, you can determine exactly what you want to control. Your decisions will impact what roles need to be populated with budget information and which Users need to track time through XCM.
How will you populate the Task budget fields? If you have not used the budget fields within XCM in the past, how will you populate them now? You have two options:

- Make populating the budget information part of the preparation process (on the fly), and add the Task budget information as the return is processed. Someone knowledgeable will have to look at the return and add the budgeted amounts before the return is prepared. If you use this option, we suggest using CheckLists to ensure the budgeted time was added.

- Use the Microsoft Excel® template that we provide through the Budget & Actual report. From the report results, you will be able to easily export the Task information from XCM, assign budgets to the Tasks, and then bulk import the budgets into XCM.

What work (Task Types) do you want to control through XCM RAS? You will definitely want all your tax Task Types flowing though XCM RAS, but you may want to control other work through it as well, such as bookkeeping, tax notices, provision reviews and tax projections.

And finally, which Statuses do you consider as “not being started” or as “completed” so you can customize exactly how you want your XCM RAS to appear? For instance, you may consider Tasks that are in the Status Preparation as the starting point (baseline) for XCM RAS purposes. If that were the case, all Statuses occurring before the Preparation Status (such as To be Scanned or Info In Not moved) would be excluded from XCM RAS. By exempting Statuses out of XCM RAS, you will not only eliminate non-useful information, but you will also be more accurately reflecting remaining budgeted hours from a User’s schedule when considering the staff person’s workload.

### 3.0 User Rights

XCM RAS is User rights driven. There are two User rights currently available:

- Full User rights – this right will allow the User not only to see XCM RAS results, but will also allow the User to assign work to be scheduled and the ability to reallocate work among the staff.

- Limited User rights – this right will allow the User to only search and view XCM RAS schedule results, but will not allow the User to schedule work or reallocate work among the staff. This right is informational only and would be appropriate for partners and managers to have if the firm wanted to control the scheduling process.

To grant a particular User the Rights to XCM RAS schedule, open up the Manage Users Utility, open the User’s profile, and then check the box next to the Enable Scheduler Tab & Reassign in Scheduler right. Then click the Save button. Only those Users that have this right will see the Scheduler tab at the top of the XCM main page.
4.0 Mapping Workflow

All Task Types controlled with XCM RAS must have mapped workflows. If you have already mapped your Task Types, please review the mappings to verify that the roles assigned to each Status are completed. This check will ensure that XCM RAS will properly reflect the remaining time of the person assigned to the Task.

If you have not mapped your Task Types yet, please consult the XCM Version 10.0 User Guide (in the Help section of XCM) to learn how to use the Workflow Mapping Utility.
5.0 Manage Settings and Defaults Utility

Use the Manage Settings and Defaults Utility to determine how you want to use XCM RAS. XCM RAS firm settings are included under the Scheduler Status Grouping section of the Firm Settings page which appears. For those firms that have multiple locations, you can standardize your XCM RAS setup across multiple locations, or customize XCM RAS on a per location basis (a firm with an office in Boston can set up XCM RAS scheduling that is different than its office in New York).

- Choose the location(s) that you want to set up for XCM RAS (CTRL/Shift key to select multiple locations).

- Choose the Task Category. Your selection will modify the windows below by displaying only those Task Types and Statuses associated with the selected Category and which have had their workflows mapped.

- Choose the Task Types to be controlled by XCM RAS. Please note that only those Task Types that have been mapped will be shown in the Task Type Pick List column. If a Task Type does not appear that you want XCM RAS to control, use the Workflow Mapping Utility to first map its workflow. Then return to this screen, which will now display the desired Task Type.

- Under the Task Type Pick List column, move the Task Type to the Task Type Selection List column by highlighting it and then clicking the arrow button in the middle. Once this step is completed, only those Tasks reflected in the Task Type Selection List will be included when calculating XCM RAS information.
Figure 5.1 – Manage Settings and Defaults (Setting up Task Types)

- Hide Statuses that are not considered “In Process” and exempt them from XCM RAS so that your XCM RAS results will be as accurate as possible and contain only pertinent information.

The underlying theory of XCM RAS is to show how busy staff members are by displaying the remaining hours assigned to Tasks that are in the process of being prepared. As the Task moves through the preparation process, XCM RAS will reflect the Budget Hours, Actual Hours and Remaining Hours for each person who is working on that Task. There are a number of Statuses that may occur before budgeted work has actually begun on the Task, as well as a number of Statuses that may occur after budgeted work is completed (in order to free up remaining budgeted time before the Task is actually moved to the Completed Status within XCM).

For example, you may consider a Task moved to the Status To Be Scanned to not have officially started for scheduling purposes. Or you may consider a Task that is moved to eFile Awaiting Consent Form as completed for XCM RAS purposes, thereby freeing up remaining budgeted time associated with the Task.

You may also have some Tasks that are in the preparation process, but will not be worked on again for a long period of time (e.g., 1040 returns that have been put on extension while you are waiting for K-1 information). You may want to move these Tasks to an On Hold Status and not show the Tasks in this Status on the XCM RAS schedule.
Use the following sections of the Scheduler Status Grouping page to exempt the Statuses that you do not want XCM RAS to reflect. 

Move the Status from the Not Started Status Pick List column to the Not Started Status Selection List column (CTRL/Shift key to select multiple entries, click the arrow in the middle to move).

Move the Status from the Completed Status Pick List column to the Completed Status Selection List column (CTRL/Shift key to select multiple entries, click the arrow in the middle to move).

*Figure 5.2 – Manage Settings and Defaults (Considered Not Started and Completed)*

<table>
<thead>
<tr>
<th>Step 2: For Tax Category, Considered Not Started Status</th>
<th>Not Started Status Pick List</th>
<th>Not Started Status Selection List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questions Answered</td>
<td>No Info In</td>
<td></td>
</tr>
<tr>
<td>To Be Assembled</td>
<td>Unassigned</td>
<td></td>
</tr>
<tr>
<td>To Be Signed</td>
<td>To Be Outsourced</td>
<td></td>
</tr>
<tr>
<td>To Be Shipped</td>
<td>OS Awaiting Acceptance</td>
<td></td>
</tr>
<tr>
<td>Post Prep Awaiting Info</td>
<td>Outsource (Send Back)</td>
<td></td>
</tr>
<tr>
<td>Preparation</td>
<td>NLC</td>
<td></td>
</tr>
<tr>
<td>Questions Posted</td>
<td>Outsourced</td>
<td></td>
</tr>
<tr>
<td>Review</td>
<td>To Be Scanned</td>
<td></td>
</tr>
<tr>
<td>Open Points</td>
<td>Recurring</td>
<td></td>
</tr>
<tr>
<td>Cleared Points</td>
<td>Filing Not Required</td>
<td></td>
</tr>
<tr>
<td>To Be Bookmarked</td>
<td>Awaiting Check</td>
<td></td>
</tr>
<tr>
<td>OS Questions Posted</td>
<td>Info In - awaiting Prep</td>
<td></td>
</tr>
<tr>
<td>Open Review Points</td>
<td>Billing Prepare</td>
<td></td>
</tr>
<tr>
<td>Cleared Review Points</td>
<td>No Longer Task/To Be Deleted</td>
<td></td>
</tr>
<tr>
<td>Assigned Checklist Item</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary Review</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2: For Tax Category, Considered Completed Status</th>
<th>Completed Status Pick List</th>
<th>Completed Status Selection List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questions Answered</td>
<td>eFile-Awaiting Taxpayer Consent Form</td>
<td></td>
</tr>
<tr>
<td>To Be Assembled</td>
<td>eFile-To Be Transmitted</td>
<td></td>
</tr>
<tr>
<td>To Be Signed</td>
<td>eFile-Awaiting Government Acceptance</td>
<td></td>
</tr>
<tr>
<td>To Be Shipped</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>Post Prep Awaiting Info</td>
<td>Signer Review</td>
<td></td>
</tr>
<tr>
<td>Preparation</td>
<td>Extension- Awaiting Info</td>
<td></td>
</tr>
<tr>
<td>Questions Posted</td>
<td>To Be Extended</td>
<td></td>
</tr>
<tr>
<td>Review</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open Points</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cleared Points</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To Be Bookmarked</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OS Questions Posted</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Once your selections have been made, click the **Save** button.
6.0 Task Routing Sheet Time Enhancements

To make these features more intuitive, we have changed the Task routing sheet display of the Role Names and method of adding time to the User roles.

In previous XCM versions, if multiple Users were assigned to a single Role, the Role Name was highlighted in RED. In this version, the highlighting has been eliminated, replaced by the [+] and [-] symbols to the left of the Role Names. These symbols will appear if there are multiple Users assigned to the Role. Click on [+] to expand the list and [-] to collapse the list.

Note that the total Budget hours are assigned to the Role and not to a specific User. For Roles which have multiple Users assigned, only the primary User entry (first entry) lists the total budgeted hours, the secondary Users below instead display ... in the Budget column.

In previous XCM versions, if multiple Users were assigned to a single Role, a popup window allowed you to add Actual time for both the primary and secondary Users. Now, in keeping with the new [+] access to secondary Users, when you expand the list you can easily add Actual hours for all assigned Users. This same convenient approach allows the Estimated Time To Complete hours to be directly modified for all assigned Users in the Est. Time Complete column.

When you collapse an expanded User role list by clicking [-], the Actual and Est. Time Complete columns display to the total hours assigned to that role (totals the primary and all secondary User hours).

Figure 6.1 – Route Sheet Enhancements (Budget, Actual and Est. Time Complete)
7.0 Task Move Time Enhancements

We have also enhanced the Move Task popup screen. In addition to being able to add/edit hours, the User moving the Task can also see the Role to which the hours will be applied. If the Status the Task is being moved from has been mapped to a Role, that Role will be displayed in the Role listbox. If the Status the Task is being moved from has not been mapped, the time will be applied to the Others Role on the Task routing sheet.

Figure 7.1 – Time Enhancements (Move Task)

Remember, if you add/edit time from the Move Task screen, the time will be displayed on the Task Details page under Status Change Details. If the Actual time is changed directly on the Task routing sheet, the Task Details page will display the date the time was changed, the User who changed the time, and how much time was added (BLACK) or subtracted (RED).

Figure 7.2 – Time Enhancements (Details)
8.0 Budgeted Time

There are a couple of methods to add budgeted time to your XCM Tasks.

The first way to add budgets to your Tasks is to add the budgeted time as you start each Task. An easy way to do that would be to move the Task to the User who is assigned the responsibility of adding the budgets. You might want to create a specific Status for the adding of the budget hours and include that Status in the mapped workflow of the Task. In addition, you could add a CheckList item to the CheckList page to ensure that the budgets have been added to the Task routing sheet.

The second way to populate the budgeted hours within XCM is to use the Budget & Actual report export feature from the Reports tab within XCM. This feature will allow you to populate the budgets in bulk by exporting the Tasks to a Microsoft Excel® template.

The underlying theory of the Microsoft Excel® template is to provide an easy way to estimate the hours budgeted to returns based on the level of difficulty of preparing the return and then spreading the budgeted time among the staffing roles responsible for preparing the return. This is accomplished in bulk through a very efficient procedure.

To produce the template, from the Reports tab, click on the Budget & Actual Report, choose the Tasks that require budgeted time to be added, by using the available search filters. Once you’ve chosen the desired Tasks, click the Export button and the Tasks will be exported to a Microsoft Excel® template. Save the resulting file to your local system or network for editing (the spreadsheet must be able to run macros).

To use the template, complete the following steps:

Note at the top of the spreadsheet that there are lines marked 1 through 20. These represent the level of time (1 through 20) that may be assigned to returns based on the degree of difficulty. In Column E, you will need to enter the total budgeted hours assigned to each level of difficulty of return. You do not have to use all 20 rows.

Next, in the same grid at the top of the worksheet, for each level of difficulty, record the percentage of budget that should be allocated to each staffing role (just add whole numbers from 1 to 100, not percentages). The cumulative percentage allocated to the roles should total 100.

For every Task in the worksheet grid, assign a level of difficulty in column H, starting with line 26 of the spreadsheet.

Run the macro that will allocate the budgeted time to the various roles for each Task in the worksheet. You can run the Macro by clicking the View tab at the top of Microsoft Excel®, then clicking the Macros button (if you need to at this point, click View Macros), and then the Run button for the listed macro. The macro will automatically spread the budgeted time to the roles for every Task in the spreadsheet.

Email the Microsoft Excel® spreadsheet to support@xcmsolutions.com. A support ticket will be created and a response acknowledging that action sent back to you. The Support Team will import the spreadsheet contents into XCM, populating the budgets for your Tasks.
If you have any questions regarding the use of the template, please email support@xcmsolutions.com for assistance.

9.0 Adding Time to the Task Routing Sheet

A critical part of using XCM RAS is to show the remaining time associated with each role and ultimately, each User. We mentioned above the requirement to input the budgeted hours for all Tasks included in XCM RAS. Equally important is the critical need for Users to record their actual time spent working on the Task. Without accuracy for the budget and actual time components, or if they are not entered, the Remaining Time associated to the Staffing Role within XCM cannot be calculated effectively.

To facilitate the ease of adding time within XCM, we have added a new field on the Task Move popup screen that allows you to add time to the Task routing sheet at the time the Task is moved.

Figure 9.1 – Adding Time (Move Task)
We have also made some important changes to how the routing sheet reflects time, as well as how the Detail page displays who is adding time and when they added it. See the XCM Version 10.0 User Guide for a detailed explanation of these changes. If you are using XCM RAS, it is critical that your staff add time as they work within XCM and also add the estimated time to complete if more time is needed for the Task.

**10.0 Using the XCM RAS Schedule Tab**

The purpose of XCM RAS Schedule Tab is to reflect how busy Users are as a Task moves through the preparation process, which in turn will allow you to allocate work to the appropriate staff. We do this by not only reflecting the budgeted time, actual time and remaining time for Tasks that are currently being displayed on a User’s My View page (Tasks on My View Page column headers section of the Scheduler tab), but also by including the same information for Tasks that are being worked on by other Users within the firm, and which will be moved back to the User to be worked on (In Process, Not on My View Page column headers section of the Scheduler tab).

*Figure 10.1 – RAS Schedule*

<table>
<thead>
<tr>
<th>Tasks on My View Page</th>
<th>In Process, Not on My View Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Hrs</td>
<td>Actual Hrs</td>
</tr>
<tr>
<td>Budget Hrs</td>
<td>Actual Hrs</td>
</tr>
</tbody>
</table>

For example, assume that Mark is preparing a return and has 8 hours budgeted, 5 hours of actual time posted and 3 hours remaining. XCM RAS would show the return’s time details next to Mark’s name under the first set of columns, Tasks On My View Page. Then, when Mark moves the Task to John (the Partner) who needs to answer some questions, the time details show up under the second set of columns. Since the Task is no longer being worked on by Mark, his remaining hours on the return (3 hours) is displayed under the In Process, Not On My View Page columns. In this way, the scheduler knows that Mark still has 3 hours of budgeted time remaining that will come back on his schedule within a short period of time.

Viewing XCM RAS is very flexible and can be customized as required through a number of filters that allow you to define your schedule results. The filters on the left hand side of the page are all Employee Profile related fields. These fields originate from the User set up page located in the Manage Users Utility. Refer to the XCM Version 11.0a Users Guide to see how to use these fields. If these filters are useful in narrowing down your search, we would suggest you update Users’ profiles through the Manage Users utility.
TIP: If your tax department is set up based on a team concept, create a department for each team using the Manage User section of the Manage Settings and Defaults Utility. Then, from the Utility tab, open the Manage Users utility and add Users to the specific teams. This organization will allow you to easily search for and view a specific team within XCM RAS using the Department filter.

After you click the Search button, the search filter area at the top of the screen will collapse to allow you to see more of the schedule results. You can click on the (+) sign next to the Resource Allocation Details line to open up the filter areas again.
We have also added the same **Save Filter/s** feature that is included on the search page. This will allow you to create saved searches, making repetitive searches very efficient. See the XCM Version 10.0 User Guide for details on how to use this feature.

**Figure 10.5 – RAS Search Saved Filters**

Notice that the search results grid shows the Users on the left-hand side of the page with **RED** numbers next to each name. Each number represents the number of Tasks that have been assigned to that User. This is an easy way to see how many Tasks a User is working on, especially when not everyone is using the budgeted hours feature.

If you see letters and numbers in parentheses following a User’s name, they indicate that the User is a part-time employee. The letters represent Monday through Sunday and the numbers represent the number of hours the User works in a given day. This information will help the scheduler know how much work they can assign to a part-time employee.

As indicated above, the search results grid is split between two sections. The first section is **Tasks on My View Page** and shows the Budgeted, Actual and Remaining hours on all the work that is currently being worked on by each User and that sits on their My View Page (the Task’s current Status is assigned to that User).
The second section is *In Process, Tasks Not on My View Page*. This information presents Budgeted, Actual and Remaining hours on all work that the User once worked on, (that the User has remaining budgeted hours left to complete) which are now being worked on by someone else in the office, and which may ultimately come back to the original User to work on (and absorb the remaining budgeted hours). Both sections contain information essential for the scheduler to accurately assess how busy the Users are now and how busy they will be in the near future.

Click on the (+) next to each User’s name to open up and display more detail. The next level shows you the budget hours, actual hours and remaining hours along with other information on a Task-level basis.

*Figure 10.6 – RAS Detail*

To reassign Tasks between Users, click on the box next to the Task(s) you wish to reassign, and then click the *Reassign* button above the search grid. You will see the *Reassign Staff* popup screen appear prompting you to choose the person to whom you wish to move the Task. Once you choose the person to reassign the Task to, click on the *Save* button and the Task will be reassigned. There is no need to change the Status of the Task since all you are doing is reassigning the Task to someone else to work on. For those selected Tasks which are currently assigned to the selected User(s) in the search grid results, the Task will now show up on the newly assigned User’s My View page immediately.

*Figure 10.7 – RAS Reassign Work*

In this initial version of XCM RAS, there is no email notification sent to the person to whom the Task is being reassigned, but this capability will be added in the future.
Note that there is a checkbox on the Reassign Staff popup screen that says Save “Assigned To” Name to Routing Sheet. Checking this box causes the Task routing sheet staffing role associated with the current Status for the Task(s) to be changed to the User to whom the Task is being reassigned.

Using the Reassign button for Task(s) under In Process, Tasks Not on My View Page, that are not currently assigned to the selected User will not immediately move the Task(s) to the person to whom you are reassigning the Task, because the Task is not currently being worked on by that selected User. As a result, no change will be seen on any My View page since the Task has not yet been moved. However, XCM records that the Task was reassigned to another User and will push the Task to the new User (instead of the original User) at the appropriate time in your workflow process.

In the search results grid section, the Budgeted Actual and Remaining hours for Tasks that are In Process, Tasks Not on My View Page have an H before the Bud, Act and Rem column headings representing that the time is on hold.

Included in the grid is a column labeled Roles. This field displays the roles for which that User is listed on the routing sheet. If the User is currently assigned to the Task in any of those roles, that role is displayed in bolded text. If none of the listed roles is in bold, then that Task is not currently assigned to that User.

Figure 10.8 – RAS Search Results
11.0 XCM RAS Search Reports

In order to provide you with as many options for viewing and using information as possible, we have created two reports which allow you to view and export the results of your XCM RAS Scheduler tab searches.

From the Scheduler tab, after running your search (either manually or through a saved filter) and after the results are displayed, click the Report button.

*Figure 11.1 – RAS Reports*

The RAS Search Summary Report will appear and will allow you to export it to various formats, including Microsoft Excel®.

*Figure 11.2 – RAS Reports (Export Capabilities)*

For more detail, click the Go To Details Report link at the top of the Summary report to view more detail about your search results.
The **RAS Search Detail Report** will display and allow you to view and export its contents.

**Figure 11.4 – RAS Report (Summary)**

You can return to the **RAS Search Summary Report** by clicking the *Go To Summary Report* link, or exit from the report to return to the Scheduler page.
12.0 View Tasks to be Scheduled

The View Tasks To Be Scheduled link on the Scheduler tab is intended for those Users that stage Tasks needing to be scheduled.

Figure 12.1– View Tasks to be Scheduled

This feature allows the User to search for Tasks that have been moved to specific Statuses indicating that they are ready to be scheduled. To use this feature, click the View Tasks To Be Scheduled link and the following View Tasks To Be Scheduled page will appear:

Figure 12.2– View Tasks to be Scheduled (Search Criteria)
Using the available search filters, you can easily view and open the Status that shows the Tasks that need to be scheduled. Note that the Budget Role To View is a required filter field and points to the Role on the Task routing sheet which displays the budgeted hours for the User to whom you are moving the Task.

For instance, if you are moving a tax return Task to a preparer to start the return, in the Budget Role To View listbox, you would select the Preparer role. Once you click the Search button, the budgeted hours for the Preparer would be displayed in the search grid, allowing you to see the budgeted hours you need to schedule.

*Figure 12.3 – View Tasks to be Scheduled Results*

![Figure 12.3 – View Tasks to be Scheduled Results](image)

Seeing that work does need to be scheduled, you would then run the Scheduler tab on a separate monitor (for easiest reference) for the group of Users you are trying to schedule. Once you have identified who has available time, you would use the Move Task button on the View Tasks To Be Scheduled page to allocate the work to those User(s).
13.0 Projected Start/Restart Date

For those firms using XCM RAS, we have added a new field on the Task routing sheet called *Projected Start/Restart Date*. This field is located just above the *Due Date* field.

*Figure 13.1 – Projected Start/Restart Date*

This field is being added for several reasons.

Some firms schedule work by having their staff tell the scheduling person what work will start within the next week. You can use this *Projected Start/Restart Date* field to indicate when a Task will start. The projected start date will not only be reflected on the routing sheet, it will be reflected in XCM RAS as well.

**TIP:** If you require your staff to provide a scheduling person with an updated list of work that will be started in the subsequent week, use this field to reflect when the work will be started. You may also want to create a new Status called *Tasks Projected to Start* and instruct your staff to move the Task to this Status when they use the *Projected Start/Restart Date* field to determine when the Task is scheduled to start. Doing so will ensure that the Task, the projected start date, and the budgeted hours will be reflected for that Task in XCM RAS.

Firms can also use this field to indicate when a Task is on “long-term hold” and will not be worked on for an extended period of time. For example, assume a preparer is working on a 1040 return in early April, but will not be receiving the client’s K-1 until August. By adding a restart date of 8/1, you are effectively telling the system that the return will not be worked on until August.

**TIP:** If you are using this field to indicate that the Task is not going to be worked on for a while, we suggest that you create a new Status called *Long Term Hold* and classify the Status as *Not Started/On Hold* on the XCM RAS Manage Settings And Defaults page. Doing so will ensure that those Tasks will not show up in the XCM RAS Scheduler until they move out of the Long Term Hold Status.

In addition to adding the *Projected Start/Restart Date* field on the Task routing sheet, we have also added the ability to search for Tasks with or without a projected start/restart date. These changes will also allow a User to add the *Projected Start/Restart Date* to multiple Tasks in bulk.
On the Search tab, these two fields have been added:

- **Projected Start/Restart Date** – Allows you to define a range of Start/Restart dates which satisfy the search criteria. The search results will include all Tasks assigned a *Projected Start/Restart Date* within the defined range.

- **Tasks that do not have Projected Start Date** – This will allow the User to search for Tasks that do not have a *Projected Start/Restart Date* defined.

*Figure 13.2 – Projected Start/Restart Date (Filters)*

With both these fields as available search filters, all Users will be able to define these fields to Tasks in bulk. Both filters will work with all of the rest of the filters on both the regular search page and the advanced search page. Once either filter is used, the search page is expanded to allow you to choose multiple Tasks and assign a *Projected Start/Restart Date* in bulk.

We have also updated the **Custom Grid** section of the **Manage Settings And Defaults** utility to allow you to show the *Projected Start Date* field in the Search page grid. After opening the **Manage Settings And Defaults** utility, open the **Custom Grid** section, then from the **Grid Pick List**, move the *Projected Start Date* entry to the right-hand **Grid Selection** column. You can change the field order using the up and down arrows once it is in the list.
Figure 13.3 – Projected Start/Restart Date (Search Grid)

The **Projected Start/Restart Date** column will now appear in the **Search** tab search results.
Figure 13.4 – Projected Start/Restart Date
14.0 Tips for Scheduling/Assigning Tasks with XCM RAS

We have provided a number of ways for your firms to schedule resources. The simplest way, and yet the most unstructured way, is to just let Tasks naturally move to the staff assigned to the Tasks. If Mark is listed as the Preparer on the Task routing sheet, when the Task is moved to Mark, the Task will show up on Mark’s On My View Page section of the XCM RAS Scheduler tab. Once every morning or during the day, the scheduling person would simply open up the Scheduler tab and balance the workload among the department Users through the Reassign function.

The next method is to build a formal process to schedule new work that needs to be assigned to your staff. This process would include staging work to a Status defined for that purpose and a User who will assign the work.

In this method, you would:

- Create a new Status (using the Manage Workflow Statuses utility) named To Be Scheduled and map the Status into the Task Type’s workflow using the Manage Workflow Mapping utility.

- As new Tasks are ready to be scheduled, the Tasks would be moved to the scheduling person, with the Tasks showing up on his/her My View page under the Status To Be Scheduled.

- The scheduling person would then open the Scheduler tab and click on the View Tasks To Be Scheduled link.

- The Scheduling Page will appear and the scheduling person would search for the Tasks that need to be scheduled using the available filters.

- For ease of reference, the scheduling person would also have the Scheduler tab open on another monitor to view which Users have available time, or may have exported the search results to an spreadsheet, and would then reassign Tasks based on that information.

The final method to schedule work is to have your professional staff inform the scheduling person what work will start in the next week or two as follows:

- When creating the Task, the staff would place the scheduled start date in the Projected Start/Restart Date field on the routing sheet.

- Or, as an alternative, the staff would search for Tasks that will be starting and add the Projected Start/Restart Date in bulk using that feature of the Search tab.

- Once the staff has completed either of the above steps, the scheduling person would open up the Scheduler tab, click on the View Tasks to Be Scheduled link, and use the Projected Start/Restart Date filter to search for those Tasks and the related budgets.

- For ease of reference, the scheduling person would also have the Scheduler tab open on another monitor to view which Users have available time, or may have exported the search results to an spreadsheet, and would then reassign Tasks based on that information.