I hope you enjoy this edition of the XLerant NewsPak where you can find out about new features, learn a clever way to do something, and find out what's happening in the XLerant community.
Warm Regards,
Joanne E. Brunn, CEO

The XLerant NewsPak

You Asked...We Delivered

The following new features are available and ready for use:

- myXL Dashboard
- myXL new ribbon functions for accessing unit notes and filenames
- Built-in Allocations model
- Collaboration - unit notes, revoke notes, admin notes, file attachments
- Monthly spreading of line item details
- Cash basis pay schedules
- More...

These new features will be released shortly:

- Detailed forecasting - to include headcount, assets and line item detail spreading
- Bulk mapping and unmapping additions

Learn More

How do I?
How do I get my users, across the organization, to assign consistent notes to accounts?

A new feature called 'categories' allows the administrator to create custom categories or pre-defined notes (for example for a list of strategic initiatives, or priority levels), that your budget holders can use to 'tag' accounts as they are budgeting. A new feature in myXL will allow you to retrieve the list of categories and identify the accounts that have been designated with these categories.

See Section 3.19.2 Categories in the [BudgetPak Configuration Manual -main](#) located on the XLerant Support Desk.

Thought Leadership Series
We have a series of e-books and whitepapers dedicated to mission of engaging employees, empowering finance managers and department heads to make more informed decisions so that the strategic objectives of the organization can be met.

[eBook: Employee Engagement as a Business Strategy for Finance and Leadership Teams](#)
Research shows that employee engagement and empowerment offer many benefits to organizations. And while there are myriad tools and programs aimed at increasing engagement... Collaborative budgeting is a simple way to turn a mandatory annual procedure into an effective employee engagement strategy.

Live at CCBO Conference - Business Officers Roundtable
Featuring:
Russell M. Litke, VP for Administrative Services, San Juan College
Brad McCormick, VP for Business Services and College Facilities, John A. Logan College
Steve Miller, Interim Controller, San Juan College
Andrea Weaver, Interim Assistant Controller, San Juan College
Joanne E. Brunn, CEO, XLerant (moderator)

What happens after CCBO? For John A. Logan College and San Juan College the answer was a significant change in their budgeting process - moving from Excel-based spreadsheets to a collaborative budgeting solution. This interactive roundtable will examine the "budgeting journey" of these two schools: from the internal discussions and justification behind the initial change (including independent evaluation of solutions at the CCBO forum in 2013) - to the lessons learned and benefits gained two-years (and two budget cycles) later.

A big **"Thank you!"** to our wonderful clients, Brad McCormick, Russell Litke and Steve Miller, for sharing their insights and stories.

Thinking Differently - Days

Can you name three consecutive days without using the words Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, or Sunday (or day names in any other language)?

Give Up?

Talk to Us

- Do you have a BudgetPak question?
- Is there a feature that you would love to see in an upcoming release?
- Do you need a training refresher or consulting help?
- Are you thinking about rolling out to more users?

Send an email to: Services@XLerant.com

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