The XLerant NewsPak

News from Client Services - April 2012

Did You Know...

In the Configure Versions screen, you may temporarily hide the fiscal years grid to get more space to view the versions grid; click the button "Hide fiscal years."

*You can make a version inactive if you don't want it to be listed in drop-down lists and selectors within BudgetPak, but you don't yet want to delete it from the database. Deselect the 'active' checkbox

Welcome Back!

Hello Christine ,

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, VP Client Services

Coming Soon

Upcoming Enhancements

You asked. We deliver. The following enhancements are scheduled to be released in this quarter:

Headcount Allocations - easily allows an employee and those associated headcount costs to be spread across multiple units. These units will see the budget impact of employee-related decisions, but control and ownership will be maintained by the employee's home unit.

Multi-level Calculations - will enable calculated accounts to reference other calculated accounts. This will simplify building and maintaining complex calculations, and preserve your control and flexibility of the user experience.

Improved Drivers Functionality - expands the capability of drivers so that monthly and annual drivers along with user entered rates can be utilized together in any combination. This simplifies the budget methods while allowing the user greater flexibility in budgeting. In addition, you will be able to expose individual drivers to only the units where they're relevant.

How do I...?

Q. How can I lock users out of the system when I want to make maintenance changes?

for that version. *

A. In order to make any changes safely, you will need to 'lock the company.' This will post the red message stating that 'servicing/administration/configuration' changes are in progress. Here are the steps that you will need to take:

1. In Config-> Users & Locks, the first tab shows when the users logged in, or when they opened the budget. Users are considered 'locked' when they are logged in. This can be used as a guideline to see if they're actually in the system right now or not. If they logged in 5 minutes ago, they likely are. But if they logged in last night, or 5 hours ago - then probably they just forgot to log out.
2. Check the second tab - budgets - to see if any users are actively working in a budget. Again if the time stamp is 5 minutes ago, they likely are actively working in that budget. But if they logged in last night, or 5 hours ago - then probably they just forgot to log out.
3. Depending upon the time stamps determined above either contact the user(s) and ask them to log out or simply unlock the user(s).
4. Lock the company, using the button on the top of the screen, so the users cannot get back in until you are done with your changes.

Note: No one can lose any data since as soon as they hit 'save changes' everything is saved and up to date. The most that could be lost is the data entry done since the last Save.
Please see:
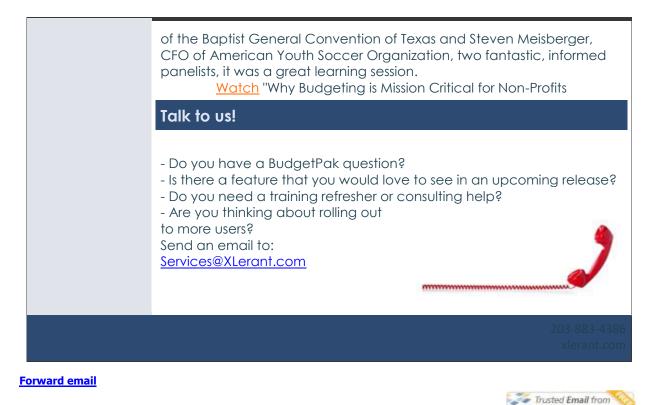Section 5.3 - How to unlock a user/budget/company in the Configuration Guide and Reference manual

Client Profile

TEXAS ★ BAPTISTS
BAPTIST GENERAL CONVENTION OF TEXAS

We wouldn't be us without you!
This past month, XLerant's executive webinar series focused on the importance of budgeting for Non-Profit organizations, especially in today's economy. Thanks to Jill Larsen, CFO

of the Baptist General Convention of Texas and Steven Meisberger, CFO of American Youth Soccer Organization, two fantastic, informed panelists, it was a great learning session.

Watch "Why Budgeting is Mission Critical for Non-Profits

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

203-883-4386
xlerant.com

Forward email

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