# The XLerant NewsPak

## News from Client Services - September 2013

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#### CFO Dimensions Conference

We're at CCBO & EACUBO

The Bear

### **Our Perspective**

Most people think of budgeting as a financial process and the budgeting system as a financial one. Yet, if you stop and think about it, **90% to 95% of users in the budget process are nonfinancial people**. Why is that?

Go to the blog to read on...

## 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 major enhancements are scheduled to be released in the upcoming two quarters:

**Targets by Line Item** - the ability to desiginate specific targets by line item by unit. For example, Increase Account 101-Travel for Unit 300-Marketing by 1%; Decrease Account 101-Travel for Unit 445-Sales by 1.5%

**Multi-year Budgeting** - the ability to easily create annual projections by unit for upcoming years. For example, you could create a 5-year projection that uses your current budget as a starting point, with a 5% increase in income in Year 2, a 7% increase in income in year 3, etc.



## How do I...?

Q. I have different bonuses throughout the year that apply to

different groups of employees. How do I set up the Headcount & Salaries stack to accommodate multiple different bonuses?"



A. You can add up to 4 **bonus/other compensation sections** in the Headcount & Salaries stack. By specifically creating a section for each type of increase to salary, you will help the budgetholder to remember to budget for all types of increases.

**Step 1:** Go into Configuration> Stacks and Sections. Right-click the Headcount & Salaries stack and select "Add 'Bonus/Other Comp' section." The new 'Bonus/Other Comp' section will be added to the bottom of the stack (just above Monthly Spreading). You can use the up and down arrows to rearrange the section within the stack. Right-click the new section to change the section description.

You may add up to 4 bonus/other compensation sections. For example you might wish to add 2 bonus sections, one called 'Company Bonus' and one called 'Performance Bonus.'You can also use these sections for different types of increases to salary, such as 'Overload' or 'Overtime.'

**Step 2:** In Configuration>Accounts, change the source to 'event' for any accounts that need to be mapped to these new sections.

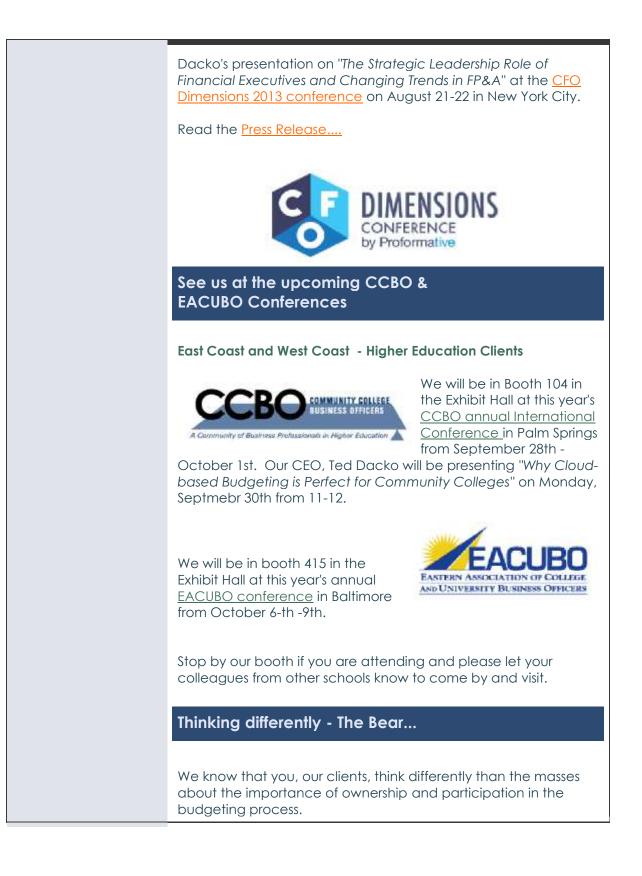
**Step 3**: In Configuration>Event Mapping, these new event-driven accounts will appear in the list of accounts on the right. Click the boxes underneath the new 'bonus/other comp' columns in order to map those sections to the appropriate accounts.

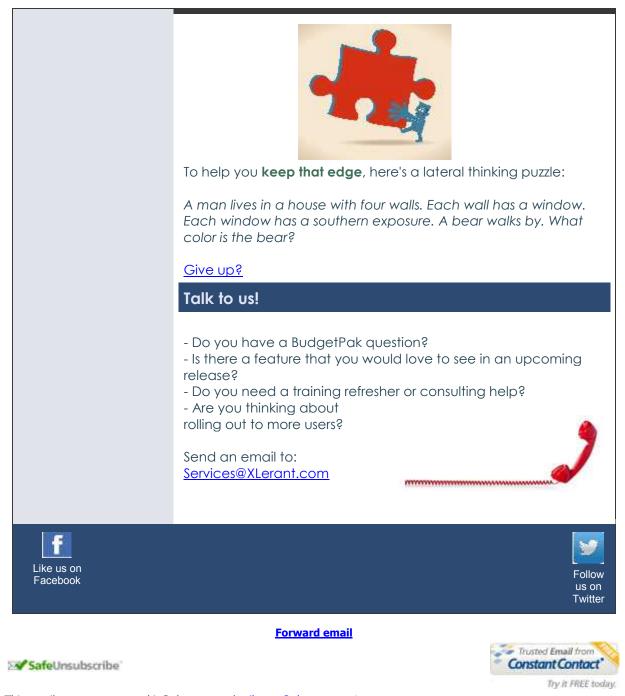
#### For more details, please see:

Section 3.11.5 on Event Mapping in the Configuration and Reference Manual

## **CFO Dimensions Conference**

We had a great turn-out at our booth and for our CEO, Ted





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