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The XLerant NewsPak

Haunted News from Client Services - October 2011

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Industry Buzz



Babies, bathwater and best practices...

Rethinking planning, budgeting and forecasting.

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Did You Know...

Driver defaults can be set for every single unit individually. In Configure Drivers, expand the tree next to each drivers name.

Happy Halloween!

Greetings,

Enjoy this *Haunted Edition* of the XLerant NewsPak !



Warm Regards,
-Joanne E. Brunn, VP Client Services

Build a Great Report. Get \$\$\$.

Enter the myXL Report Builder Contest!

Are your myXL reports outta this world? Submit your best and most insightful myXL reports and win prize money against your annual maintenance fees:

1st place: \$3000 off

2nd place: \$2000 off

3rd place: \$1000 off



Each organization may submit an unlimited number of entries and may submit on more than one occasion. Deadline is November 30th.

Send entries to myXLcontest@XLerant.com

You can assign View Only users to your budgets. Define a User Role with 'View Budget' only.

Our Perspective

CFO's enjoy more influence, according to a recent survey by CFO Magazine.

[View the XLERant blog to read on](#)

Fresh off the griddle- myXL Report Books!

Don't get caught in the dark, discover myXL today.



We want to help you understand the types of dynamic reports that can be created using myXL. All the data in the reports in this book example can be changed based on unit, time period, version and account. You have that freedom and flexibility while using Excel as a report definition/editor. It dynamically draws the data from the BudgetPak data.

[Click here](#) to view the example myXL Dynamic Report Book and get ideas to start producing your own advanced reports. This capability will increase the value of your BudgetPak product and get you precisely the reports, analysis and graphs that you and your users and management want both during the budget cycle and for monthly management reporting. Try it. You'll love it!!!!

Or, **call us** to help you get started. **(203) 883-4386**

Upcoming New Feature

We heard you! In the next release, BudgetPak administrators will be able to **designate the sort order of your units**. This order will be used in all areas where units appear--Versions, Reports, Status screens as well as the Unit Configuration graphical representation screen.



How do I... ?

Q. How do I quickly find ways to reduce my expenses and immediately analyze the impacts of different scenarios (while fending off brain-guzzling zombies)?



Don't let your employees be eaten by zombies! Using the **Guided What-If Analysis**, you can run this scenario in 2 clicks.

You can choose to delay new hires or reduce your budget by a specific percentage to reach your target. As you push out the months for new hires, you will see a real-time comparison of dollars saved and percentage reduced. You may also choose to exclude some critical new hires from this scenario.

Similarly you can reduce your budget by different percentages to see the dollar impact of your changes and exclude critical line items from the scenario. As far as the zombies go, lock your office door, and keep your cell phone charged.

BudgetPak on the Brain and in the News



BUSINESS OFFICER

This just in! XLerant client, Drew university, is to be featured in the November edition of Business Officer magazine. The article will be about BudgetPak's self-service budgeting and was co-written by XLerant President Lawrence Serven, and Howard Buxbaum, Drew University's Vice President of Finance and Administrative Affairs.

Here's some highlights from Business Officer:

Self-Service Budgeting at Drew University. *Reporting issues, lack of supporting documentation, timing variances, and other problems motivated Drew's CBO to make some changes in the university's budget development process. The finance department would step out of its traditional role of inputting all budget data into templates, and instead, those responsible for particular budgets would enter their information-and own the results. A combination of SunGard and XLerant software solutions now support a self-service system that helps users capture the rationale behind a budget, facilitate budget approvals, and eliminate linked spreadsheets for reporting. The next step: training users to better analyze their budgets.*

Client Profile

We wouldn't be us without you!

This month we would like to profile
Quinnipiac University!



QUINNIPIAC
UNIVERSITY

[Click here](#) to find out why Lucille Marottolo--AVP of Finance

and Administration--was attracted to BudgetPak's "superior scenario management and control."

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?

Send an email to:

Services@XLerant.com



203-883-4386
xlerant.com

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