

We 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.

Thank you,
The XLerant Customer Success Team



The XLerant NewsPak - October 2016

XLerant is featured in Business Officer Magazine! *Synchronizing Budgets with Strategy*

Thank you to our wonderful clients - Cheryl Warner, Controller at Northwood University, Dan Brent, Vice President of Finance and Operations at William James College and Lloyd Ricketts, Vice President and Treasurer at The College of New Jersey - for sharing their stories on the importance of intertwining strategy with financial planning.



You asked...We Delivered

These new features will be released at the end of the month:

- **Long Term Projections** - the ability to forecast out any number of years on a unit or roll-up unit level, by account or subtotal, using any of the following methods - amount, percent increase/decrease or historical trend
 - **Drill-Through** - the ability to import general ledger transaction detail and drill-through to that data in BudgetPak reports
 - **New Calculation Type** - Percent of subtotal
 - **New Look for All Reports** - All system reports have been redesigned for improved readability, and to provide a more modern look
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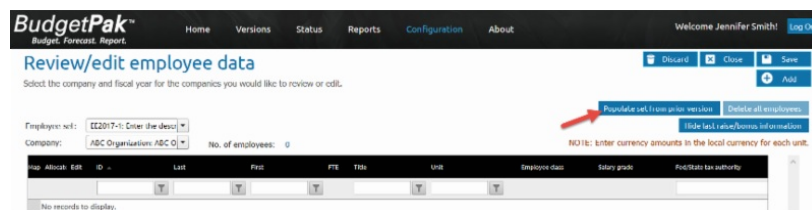
How do I?

How do I create an employee set using last year's budget?

If changes have been made to employees in a budget or detailed forecast version, for example terminations, new hires, salary increases and other employee events, you can use this as a starting point for a new version. The new employee set will exclude any terminated employees, all new hires will be included as existing employees, and starting salary will include all salary increases.

There are two ways you can create a new employee set from a budget or detailed forecast version:

1. When using the New Fiscal Year Wizard
2. By creating a new employee set on the 'Employee set' screen. Then go to the 'Edit/employee data' screen, select the new set from the drop down menu, and choose the option to 'Populate set from prior version'.



XLerant Learning Series

We will be covering new features as well as providing refreshers on current features.

**On Thursday, October 20th at 2 PM EDT we will be presenting:
Employee Configuration Overview**

Here are the details we will be discussing:

- General Overview of Employee Set Up in BudgetPak
- Tips & Tricks
- Extra Q&A Time
- **Help Us Help You** - if you already have questions related to setting up employees in BudgetPak, please send them ahead of time so we can try and incorporate them into the webinar

Please look in your inbox for an invitation, or you can register here:

<https://attendeegotowebinar.com/register/6928344201811760132>

Here is a link to our last learning series webinar on **Moving to a New Fiscal Year**:

<https://xlerant.freshdesk.com/support/solutions/articles/12000017319-webinar-how-to-move-to-a-new-fiscal-year>

Thinking Differently - The Helicopter

A helicopter was hovering 200 feet above the sea when the pilot suddenly turned off the engine. The rotor stopped, but the helicopter did not crash. Why not?

[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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