

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 - February 2017

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### XLerant Learning Series

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

**March 2nd at 2 PM EDT we will be presenting:  
Forecasting Process - Best Practices**

Here are the details we will be discussing:

- Considerations for your Forecasting Process
  - Frequency
  - Level of detail
  - Who to involve
  - Updating and maintenance considerations
- Live Demo

Please look in your inbox for an invitation, or you can [Register Here!](#)

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### You asked...We delivered

*Our first administrator conference is happening!*



**Save the date: Tuesday and Wednesday, April 18th-19th.** With an opening reception on Monday evening, and a fun event scheduled for Tuesday evening. Specific details and registration information coming soon.

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# Did you know?

## What does Rollup mean, and how does it affect reporting?

Rollup is the act of consolidating (adding up) units in the hierarchy. It only applies to rollup units. For example, when a base unit's budget is updated, the rollup unit will not reflect those changes until it has been rolled up. In other words, a report for the rollup unit may not equal the sum of the units beneath it if a rollup is pending.

There are three areas that show if the unit needs to be rolled up:

- On the **Versions** page, when you select a rollup unit you will see a red flag in the status column.

**Select a unit**

Select the unit you would like to work with: ABC Organization: ABC O

The last version you were working with was: 2017 Draft 1

You may select another version below, or:

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**Select a version**

Here are the different versions you can view and work with for unit 'ABC Organization':

Version code	Version	Note	Your description	Status	Signed off	Last
FY2017-B-3	2017 Draft 1		2017 Draft Budget 1			2/6/20...

- On the **Advanced Reporting** page, in Step 3 when selecting units there is a column for 'Needs rollup?', and any unit that does will have a Yes listed in that area.

**Advanced reporting** Select a report and detailed options for it. You may also retrieve previously-saved selections.

**Step 1: Select a report**

**Step 2: Select the version(s)**

Report on which version? 2017 Draft 1

Compare against which version?

None

This version: 2017 Final Budget

**Step 3: Select units**

The currently-selected units are listed below. Click 'Change unit selections' to select from a list of units.

1 unit selected.

Select one or more units for your report

Select company: ABC Organization: ABC Organiza Filter by cross-unit: (All cross-units)

Unit code	Description	Cross-unit	Rollup unit?	Needs rollup?
<input type="checkbox"/> ABC Organization	ABC Organization	Default	Yes	Yes
<input type="checkbox"/> M & S	Total Marketing & Sales	Default	Yes	Yes
<input checked="" type="checkbox"/> 10-200	Marketing	Group 10		Yes

- On the **Status** page, a red flag will be listed next to the unit and the status column will say 'Needs rollup'.

Here is an overview of the status of y

View Edit **Rollup** Sign off

Expand all Collapse all Status

Description	Status	Expense	He
ABC Organization	Needs rollup	\$200,712,180	
Total Marketing & Sales	Needs rollup	\$168,723,758	
Marketing	Complete	\$171,694,370	
Total Sales Offices	Complete	\$3,050,254	
Japan Sales Office	Complete	¥61,903,223	

To run up-to-date reports, make sure to "rollup" the parent unit first. This can be done on the Status page, by highlighting a rollup unit, then clicking **Rollup** (shown above), and is completed on a version by version basis.

## Thought Leadership Series

We have a series of e-books and whitepapers dedicated to the 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.

### Webinar:

## The Keys to Successful Distributed Budgeting

Budgeting can be a challenge, whether you're a company with 20, 75 or even 200 budgeting participants. As with most things, the more people you engage in the process the more complicated, time-consuming, and error-prone the experience can be. But it doesn't have to be.



Please click [here](#) to view the 'Keys to Successful Distributed Budgeting' webinar.

## Thinking Differently - Bostonian

A man was born in Boston, Massachusetts. Both his parents were born in Boston, Massachusetts. He lived all his life in Boston, but he was not a United States citizen. How come?

### 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: [TechSupport@XLerant.com](mailto:TechSupport@XLerant.com)

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