

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 - January 2018

2018 Administrator Conference

We are excited to host another conference later this year.

We are considering a different time of year, and a couple of location options, for those clients who were not able to make it last year.

Please help us in our planning by taking this [Survey](#).

Thought Leadership Series - Webinar

We have a series of whitepapers and webinars dedicated to the mission of engaging employees and empowering financial managers and department heads to make more informed decisions so that the strategic objectives of the organization can be met.



A case study in budget innovation: ZBB & RCM at A.T. Still University

Over the past five years A.T. Still University has fully transformed their budgeting processes.

Moving from Excel spreadsheets with standard, annual, percentage increases - to an integrated, strategic, budgeting process utilizing both zero-based budgeting (ZBB) and responsibility center management (RCM) methodologies - is an impressive feat. But managing this achievement with 104 budget managers across six colleges is truly noteworthy!

To learn more about the evolution of budgeting at A.T. Still University - including their innovative integration of ZBB and RCM models and what they've learned along the journey (the good, the bad...and the "why") - [listen to a recording of the webinar.](#)

Thank you so much! to our incredible speakers:

Tonya Grimm, Controller, Financial Reporting, Budgeting & Planning

Courtney Bonnell, Director, Budgeting and Planning

You asked...we delivered

Our February release of BudgetPak will include these enhancements:

- API for importing/exporting account data and selected configuration data
- Improved user experience for sorting accounts and subtotals
- Email notifications for various events (budget signed off, sign-off revoked, etc.)
- Automated password reset
- Compare up to four versions on an annual P&L variance report
- Suppress accounts with all zeroes from reports
- New monthly spreading option based on workdays
- And...an easier to navigate Configuration Menu, with an option to display only the features you are using

Did you know?

Where can I edit the names that appear on reports?

The names of all reports can be customized on the 'Report names' page of the Configuration menu.



There, you can edit any report's name by simply double clicking in each cell under the column for 'Report name'. The custom names will then appear on reports for all users.

Configure report names

Any changes you make to the report names here will be reflected on the reports you generate within BudgetPak.

Report name	Original report name
Statement of Operations Annual Report	P&L Annual Report
Statement of Operations Monthly Report	P&L Monthly Report
P&L Consolidating Report	P&L Consolidating Report
Headcount Report	Headcount Report
Budget Decisions Report	Budget Decisions Report
Budget Decisions Report - Accounts	Budget Decisions Report - Accounts
Account Configuration Report	Account Configuration Report
Unit Accounts Report	Unit Accounts Report
Unit Accounts By Enterprise Report	Unit Accounts By Enterprise Report
Statement of Operations Monthly Variance Report	P&L Monthly Variance Report
Statement of Operations Annual Report by Section	P&L Annual Report by Section
ActionPak Report	ActionPak Report
P&L Cross-Unit Consolidating Report	P&L Cross-Unit Consolidating Report
Statement of Operations Monthly Report by Section	P&L Monthly Report by Section
ActionPak Monthly Report	ActionPak Monthly Report

XLerant Learning Series Webinars

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

Our next webinar will be on Custom P&L Reports. Stay tuned for more details.

To watch recordings of some of the other webinars we have had in the past, please click [here](#).

For suggestions on what to cover in future webinars, please contact us at Services@XLerant.com.

Thinking Differently - Soviet Pictures

During the dark days of the Soviet Union, purges took place following which experts in photography would doctor photographs to remove individuals who were purged. How was one expert caught?

[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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