

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 - December 2017



### *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.*



### Strategy Execution with a Balanced Scorecard

A balanced scorecard can provide management with an effective tool to not only create a strategy but to articulate their vision and execute a plan to achieve that vision.

[Listen to the Balanced Scorecard webinar](#) presented by guest speaker Jennifer Eversole, CPA. Jennifer, an industry expert in finance and organizational strategy, provide strategies for creating a Balanced Scorecard methodology in

your organization - whether you are evaluating the effectiveness of your current Balanced Scorecard or building it for the first time - including how to leverage your budgeting process.

[Read the CFO Guide to Strategy Execution blog](#) which outlines the Balanced Scorecard approach as an effective way to create and manage a company's strategy.

## You asked...we delivered

*Our next 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 by only displaying the options you are using

## Did you know?

*What is the impact of updating a unit to be a 'reference unit'?*

If you have a unit that has been used for budgeting in the past, but should no longer be budgeted for, you can update it to be a reference unit. Here are some points to consider before updating any units to be reference units:

Specifications for unit USA Executive:

Unit details	
Unit code:	10-700
Description:	USA Executive
Culture and currency:	<div style="border: 1px solid #ccc; padding: 2px;">Select... Culture: English (United States) Currency: USD (\$)</div>
Budgetholder:	Dean, Barbara (Dean) <span style="float: right;">Explain...</span>
Budget asst:	<input type="checkbox"/> (Check box for assistant)
2nd asst:	<input type="checkbox"/> (Check box for 2nd assistant)
3rd asst:	<input type="checkbox"/> (Check box for 3rd assistant)
Cross-unit:	Group 10
<input type="checkbox"/> Allow headcount for this unit	
<input type="checkbox"/> Allow assets for this unit	
<input checked="" type="checkbox"/> Make this a reference unit	

- A reference unit is excluded from the signoff/approval process, but is still incorporated into reports and roll-ups.
- A reference unit may not include headcount or assets in ANY year - if there is any existing employee data in prior years, the unit should not be converted into a reference unit.
- Headcount computations and calculated accounts WILL be computed for a reference unit, so if there are any headcount-based accounts or any calculations that depend on headcount, those calculations will be recomputed (and since a reference unit will have no headcount, the totals will usually be \$0 for any such accounts).
- If a unit does not have headcount or assets associated with it, the values for any user or other calculated accounts (non-headcount or asset accounts) will not change when you update it to a reference unit.

You can copy any prior year budget versions into reference versions before updating any units to be reference units, this way you retain the finalized data before removing headcount or assets from the units.

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## XLerant Learning Series Webinars

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

**Our latest webinar covered the Add Account Guide. [Watch it now!](#)**

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](mailto:Services@XLerant.com).

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## Thinking Differently - Mickey Mouse's Girlfriend

Why were a group of grown men running around asking each other, "Who is Mickey Mouse's girlfriend?"

[Give Up?](#)

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## 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](mailto:Services@XLerant.com)

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