

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 Client Services Team



The XLerant NewsPak - April 2018

XLerant Joins Jonas Software

We are excited to be a part of the Jonas Software family

A few weeks ago, I sent an email to all of you regarding our acquisition by Jonas Software. The same XLerant team is here to serve you and continue to develop BudgetPak with the same standards of excellence we have for years. The XLerant leadership team will also remain the same, with the added support and resources of the Jonas Group to draw on. In fact - in our first few weeks with Jonas we have already expanded our customer service team to further improve on our award-winning level of client care.

The only difference you will see is that your invoices will come from Jonas Software instead of from XLerant.

I'm happy to speak with you if you have any questions, concerns, or would like any additional information. We are looking forward to this next phase in XLerant's growth. And we look forward to our continued partnership with you, your team, and your organization.

Warm Regards,

A handwritten signature in black ink that reads 'Joanne C. Brann'.

You can read the press release [here](#) .

Save the date...

2nd Annual Administrator Conference

Registration details will be coming soon.

October 1-3, 2018
Ann Arbor, Michigan
Sheraton Ann Arbor Hotel



You asked...we delivered

Our next release of BudgetPak will include these enhancements:

- **New Versions Guide** - the guide will walk you through all the steps of adding a new version, or changing an existing version.
- **Multiple Sign-off Versions** - the ability to have more than one sign off versions within a fiscal year.
- **Baseline version changes** - you will have the option to no longer have a baseline budget version. Alternatively, you can have multiple baseline budget version, which will allow you to build different scenarios more easily.
- **New Reporting Options**
 - Include or exclude ActionPaks from P&L reports
 - Option to add a percent of budget remaining variance to some reports
 - Ability to run all headcount reports from a rollup unit level
 - New comparison options on the Account Totals Across Units report

XLerant Learning Series Webinars

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

Our next webinar is on Wednesday, May 16th
Topic: Email Notifications & Automatic Password Reset
To register, click [here](#).

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.

Did you know?

How do I set up hourly employees for the first time?

To set up hourly employees for the first time in BudgetPak, the following steps need to be followed.

1. **Define Wage Classes** - each hourly employee is assigned to one wage class. They are predefined by the BudgetPak Administrator and need to be manually created on the 'Define Wage Classes' Configuration page.
2. **Define Wage Types** - hourly employees are budgeted by designating the hours and rates for each predefined wage type. Examples of wage types are Regular, Overtime, Sick, Holiday or PTO. Wage types can be created on the 'Define Wage Types' Configuration page.
3. **Configure Wage Accounts** - update any hourly wage accounts to have the account source 'Headcount-based'. This can be done on the Accounts Configuration page.
4. **Map events to accounts** - on the 'Map Events to Accounts' Configuration page, map all hourly wage accounts to Hourly Compensation.
5. **Add the Hourly Compensation section** - on the 'Stacks & Sections' Configuration page, add the section for Hourly Compensation to the Headcount & Salaries stack.
6. **Validate and Initialize**
7. **Import Employee Data** - for hourly employees, current salary column should be \$0, and the Hourly column should be marked with an "X".
8. **Import Hourly Defaults** - on the Configuration Data page, import the template for 'employee hourly data by wage type'. This allows you to assign a starting wage for each employee and an estimated number of annual hours, by wage type.
9. **Validate and Initialize**

Once these steps are complete, you will be able to edit each hourly employees wage and hours by pay period.

Employee/wage class/wage type	Pay period 1	Pay period 2	Pay period 3	Pay period 4	Pay period 5	Pay period 6	Pay period 7	Pay period 8	Pay period 9	Pay period 10	Pay period 11	Pay
Gilbert, Angela (317063)												
Total hours:	197.00	173.00	173.00	173.00	173.00	177.00	173.00	173.00	173.00	173.00	173.00	
Total wages:	\$4,110	\$3,398	\$3,398	\$3,398	\$3,522	\$3,602	\$3,522	\$3,522	\$3,522	\$3,522	\$3,522	
Regular												
Hours:	174.00	166.00	166.00	166.00	166.00	170.00	166.00	166.00	166.00	166.00	166.00	
Rate:	\$38.50	\$38.50	\$38.50	\$38.50	\$40.00	\$40.00	\$40.00	\$40.00	\$40.00	\$40.00	\$40.00	
Subtotal:	\$3,350	\$3,196	\$3,196	\$3,196	\$3,320	\$3,400	\$3,320	\$3,320	\$3,320	\$3,320	\$3,320	
Overtime												
Hours:	13.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	
Rate:	\$57.75	\$57.75	\$57.75	\$57.75	\$57.75	\$57.75	\$57.75	\$57.75	\$57.75	\$57.75	\$57.75	
Subtotal:	\$375	\$202	\$202	\$202	\$202	\$202	\$202	\$202	\$202	\$202	\$202	
Holiday												
Hours:	10.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Rate:	\$77.00	\$77.00	\$77.00	\$77.00	\$77.00	\$77.00	\$77.00	\$77.00	\$77.00	\$77.00	\$77.00	
Subtotal:	\$385	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	

For detailed documentation on the Hourly Employees feature of BudgetPak, click [here](#).

Thinking Differently - The Code

The concierge at an exclusive club says one word to each prospective entrant. If the entrant answers correctly they are allowed to enter, otherwise they are rejected.

A hopeful non-member observed carefully as a member approached. The concierge said, "Twelve." The member replied, "Six." She was admitted. A second

member came up. The concierge said, "Six." The member replied, "Three." She was admitted. The non-member now decided this was easy and stepped forward. The concierge said, "Ten." She replied, "Five." The concierge angrily kicked her out. What should she have said?

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

XLerant, Inc | 203-883-4380 | services@xlerant.com |
www.xlerant.com



Copyright © 2017. All Rights Reserved.