

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 - May 2018

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### XLerant's 2nd Annual BudgetPak Conference

*There will be workshops for new and experienced administrators with highlighted best practices in various functional areas.*

#### **Registration is now open!**

**Monday, October 1st - Wednesday, October 3rd  
at the Sheraton Ann Arbor Hotel**

[Click here for more information and to register](#)

Registration includes all workshops, a meet and greet event Monday evening, breakfast, lunch and dinner (out in Ann Arbor) Tuesday, as well as breakfast and lunch on Wednesday.

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### Upcoming Panel Discussion Webinar

*Practical Forecasting - In Search of the Financial Unicorn*

**We are thrilled to be featuring two of our clients in our upcoming webinar:**

*Sally Berven, CFO, Perot Museum*

*Anne Wells, Director of Business Services, The University of Findlay*

*Joanne Brunn, CEO, XLerant (moderator)*

[Register for this webinar](#) to learn how these two organizations achieved a practical, achievable, and manageable method for forecasting. With an interactive Q&A style session, our guest speakers will share their experiences and lessons learned along the way.

Wednesday, June 20, 2018

1 PM ET | NOON CT | 11 AM MT | 10 AM PT

[REGISTER HERE](#)

## You asked...we delivered

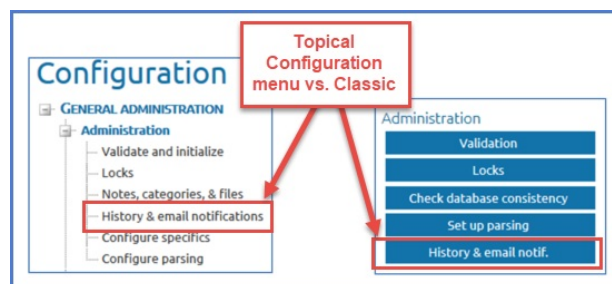
*Our next release of BudgetPak will include these enhancements:*

- **Dashboard** - charts and graphs showing key performance indicators, progress to budget completion, headcount information, consolidations by unit or subtotal comparisons and key variances.
- **Monthly Benefit By Employee** - change the rate of individual employee benefits by month, allowing the ability to show a mid year rate increase.
- **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

## Did you know?

*How do I set up email notifications to be automatically sent out?*

The **History & Email Notifications** configuration page is used to designate which BudgetPak actions, performed by a budget holder, budget manager, or projection owner, will trigger an email notification to be sent out to the affected user(s).



For each Action, i.e. starting budget/forecast, sign off budget/forecast, revoke budget/forecast sign off, etc. the BudgetPak Administrator can adjust the following:

- **Logged to history:** The action is recorded in the history for the affected version and unit. The history can be viewed by the budget holder on the Versions and Status screens.
- **Display on-screen user message:** The affected users are notified on the

home screen that they have a message, and they can view the logged events.

- **Email current user:** Email notification will be sent to the user performing the action.
- **Email budget holder/owner:** Email notification will be sent out to the budget holder or projection owner of the affected unit.
- **Email manager:** Email notification will be sent out to the budget holder of the next roll up unit in the organizations hierarchy.
- **Email CC list:** Email notifications will be sent out to users whose user role includes 'Receives CC emails'. This can be defined on the User Roles configuration screen.

Email notifications are sent by 'BudgetPak Support', but their subject line and content can be customized for each action by the BudgetPak Administrator.

### Configure history and email notifications

Here you can designate which BudgetPak events will be recorded in the history for a version and unit, and will trigger an email notification to a budget holder. You can customize the subject line and text for different events.

[Click here for instructions on sending and formatting emails.](#)

Company: ABC Organization  Disable all email notifications for this company

Action	Log to history?	Display on-screen user messages?	Email current user?	Email budget holder / owner?	Email manager?	Email CC list?	Subject line	Email body	
Budget status change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Budget status changed by {User} on {Time}	{User} changed budget status on {Time}. Affected version: {Version} Affected unit: {Unit} This email has been automatically generated by BudgetPak.	<a href="#">Edit email</a>
Start budget/forecast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Budget/forecast started by {User} on {Time}	{User} performed action '{Event}' on {Time}. Affected version: {Version} Affected unit: {Unit} This email has been automatically generated by BudgetPak.	<a href="#">Edit email</a>
Complete budget/forecast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Budget/forecast completed by {User} on {Time}	{User} performed action '{Event}' on {Time}. Affected version: {Version} Affected unit: {Unit} This email has been automatically generated by BudgetPak.	<a href="#">Edit email</a>
Sign off budget/forecast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BudgetPak Automatic Notification: Budget/forecast signed off by {User} on {Time}	{User} performed action '{Event}' on {Time}.  Affected version: {Version} Affected unit: {Unit} This email has been automatically generated by BudgetPak.	<a href="#">Edit email</a>

For detailed documentation on the configuration and usage of Email Notifications in BudgetPak, click [here](#) .

## XLerant Learning Series Webinars

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

**Our latest webinar covered Email Notifications & Automatic Password Reset.**  
**To watch it, 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](mailto:Services@XLerant.com).

Several truck drivers at a roadside café started to play poker. The pot was large and the game was serious. Suddenly one of the men accused the dealer of cheating. The dealer drew a knife and, in plain view of all the others, stabbed the man and killed him. The police were called, and they interviewed everyone who had been present, but no man was arrested or charged with any offense. Why not?

[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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