

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 - June 2018

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.

We are working on our final agenda. In the meantime, you can [click here to see a list of proposed topics.](#)

Panel Discussion Webinar

Practical Forecasting - In Search of the Financial Unicorn

Thank you so much! to our clients that participated in our webinar:

Sally Berven, CFO, Perot Museum

Anne Wells, Director of Finance and Business Planning, The University of Findlay

Joanne Brunn, CEO, XLerant (moderator)

[Listen to 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 shared their experiences and lessons learned along the way.

You asked...we delivered

Our next release of BudgetPak will include these enhancements:

- **Clone of New Hire** - the ability to add one new hire, and then clone the new hire within the unit and budget version.
- **Bulk Salary Increases for Hourly Employees** - new configuration action allowing the administrator to push out salary increases to hourly employees.
- **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 create an ActionPak that should be used in multiple units?

The BudgetPak administrator has the ability to create an ActionPak on the Configuration page, and assign that ActionPak to one or more units. The ActionPak can also be made mandatory for a unit and version, which means that in that unit the ActionPak stack and section will automatically appear when the Budget Holder views the budget navigation screen. This type of ActionPak is referred to as a **Shared ActionPak**. An ActionPak which is created within a budget version for a specific unit is referred to as a Private ActionPak.

Shared ActionPaks can be created and edited on the 'Define Shared ActionPaks' Configuration page.

Define shared ActionPaks

Shared ActionPak can be used across multiple units, versions, and years. You will need to designate which units may use a shared ActionPak and, optionally, the versions for which usage is mandatory. The accounts available for use are the discretionary accounts mapped to the units mapped to the ActionPak.

Management:

Shared ActionPak name: 1

Shared ActionPak code:

You may use these up/down buttons to change the order in which your shared ActionPaks appear.

Usage:

Unit mapping: 3 Base units selected 2

Mandatory version usage: 0 versions selected 4

ActionPak usage

View missing account/unit mappings

Line items used in this shared ActionPak:

These accounts are currently part of this shared ActionPak. You may add more accounts from the list of available ones to the right. If you want to remove an account from the ActionPak, you may do so, but any currently budgeted values for it will be lost.

| Account Number | Account Name |
|----------------|-------------------------|
| 4300 | Consulting Fees |
| 5300 | Printing Costs |
| 8000 | Meeting Expense |
| 8100 | Air Transportation |
| 8300 | Auto Expense - Travel |
| 8400 | Lodging Expense |
| 8600 | Training Fees |
| 8700 | Misc Expenses |
| 4350 | Other Advisory Services |

Add or remove line items from the shared ActionPak:

Line items available for use:

These are the discretionary accounts available for use in this shared ActionPak (they are the accounts mapped to the designated units mapped to this ActionPak).

| Account Number | Account Name |
|----------------|---------------------------|
| 4200 | Audit Fees |
| 4500 | Temp Help |
| 600 | Messenger/Delecta/Outbase |
| 4700 | Professional Fees |
| 5000 | Photography |
| 5200 | Advertising |
| 6100 | Software Maintenance |
| 8200 | Rental car |
| 8500 | Seminar Fees |
| 8800 | Subscriptions |
| 6000 - Total | Total Software Licenses |

To set up a Shared ActionPak:

1. Click *Add shared ActionPak* and designate the name and code. The Shared ActionPak Code must be unique across ALL ActionPaks, shared or private.
2. Designate the unit or units which can see and use the shared ActionPak. Depending on which units are selected, the accounts available to use in the Shared ActionPak will change. Only discretionary accounts that are mapped to those units will be shown.
3. Select the accounts to be included in the ActionPak by highlighting them, and using the arrow to move the account to the box on the right.
4. Optionally, the Shared ActionPak can also be set up as mandatory for one or multiple budget versions, meaning it will show up automatically on the budget navigation screen for all units it is assigned to.
 - If the Shared ActionPak is not mandatory, the Budget Holder in each unit it is assigned to would have the option of adding it into their budget on the ActionPaks page of the budget navigation screen.

Initialization is required after adding a Shared ActionPak.

For detailed documentation on the configuration and usage of Shared ActionPaks, click [here](#), or to watch our **Learning Series Webinar on Private & Shared ActionPaks**, click [here](#).

XLerant Learning Series Webinars

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

Our next webinar is on Thursday, July 12th

Topic: Advanced Reporting and Custom myXL Reports

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.

Thinking Differently - Below Par

A woman took up golf for the first time and within a month she went around the local course in under 90 shots. However, she was not pleased. Why?

[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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