



## The Xlerant NewsPak - January 2019

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### Xlerant Community Forums

*Start or Join a conversation in the Forums section of our support site*

*One of the most popular activities at the User Conference was networking and learning about each other's budgeting process. Forums is the place where you can connect with each other. We have set up the following 4 areas:*

- Share best practices
- Feature Requests
- How are other organizations using...?
- Ideas for new forums, webinar topics, or anything on your mind

Be sure to "**Subscribe**" to topics you are interested in to get notified of other responses! [Want to start a conversation?](#)

The screenshot shows the Xlerant BudgetPak website interface. At the top, there is a dark blue header with the 'BudgetPak™ Xlerant' logo and the tagline 'Budget. Forecast. Report.'. Below the header is a navigation bar with 'Home', 'Forums', and 'Tickets' tabs. A red arrow points to the 'Forums' tab. Below the navigation bar is a search area with the text 'How can we help you today?' and a search input field. To the right of the search field are two buttons: '+ New support ticket' and 'Check ticket status'. Below the search area is a section titled 'Community forums' with a red underline. Underneath, there is a sub-section 'Xlerant Forums' containing five forum categories, each with a lightbulb icon and a count of 0: 'Announcements (0)', 'Feature Requests (0)', 'Share Best Practices (0)', 'How are other organizations using...? (0)', and 'Ideas for new forums, webinar topics, or anything on your mind (0)'.

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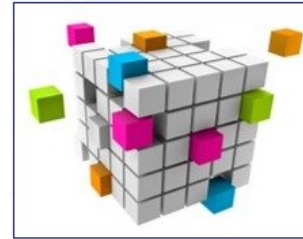
### Our Blog

*Top 5 Benefits of Multi-participant Budgeting*

Group projects. A uniquely painful experiment that many of us try to avoid at all

cost...

For many finance teams involved in a multi-participant budgeting process - it can feel like a highly dreaded and never-ending group project. The good news is there are ways to avoid (most of) the pains of multi-participant budgeting...



And even better, there are fantastic benefits for organizations that engage their staff in the budgeting process.

[Want to read more?](#)

## Did you know?

*What happens if the employee set is updated via import after the budget has been started? What are the implications?*

Changes can be imported into the employee set mid-budget. Depending on the type of changes, other elements of configuration may be impacted. When re-importing the employee set, on the **Import/export employee data** page, there will be a warning explaining these implications.

**Import/export employees**  
Import/export employees for a designated company and employee set.

Step 1: Make your import selections    Step 2: Preview the import    **Warnings - read & confirm**

**Warning: Some mappings may need to be re-imported**  
 Confirmed

**IMPORTANT NOTE:** This warning is only applicable if you are re-importing any existing employees with a different home unit than previously loaded. In this case, if the employee is still allocated to their original home unit, you will have to re-configure their account mappings in that unit, including account mappings for benefits, if you are using benefits by employee. You may re-import the: (1) employee allocations via the Configuration Data screen -> Benefit/account mapping). Or, you may re-configure these items via the following Configuration pages: (1) Employee allocations via the Edit Employee Data screen (click on trident icon on the same line as the employee); (2) Employee benefit/account mapping via the Configure benefit Selections page; verify employee benefits are correct and click trident icon to map appropriate benefits accounts in each unit they are allocated into.

If you re-import existing employees with a different home unit and utilize benefits by employee and/or employee allocations, the result will require a reconfiguration of account mappings, including the benefit/account mappings and employee allocations. Best practice is to export the 'benefit/account mappings' on the **Import/export config. data** page prior to re-importing the employee set.

**Import configuration data**  
Import/export configuration data

Step 1: Make your import selections    Step 2: Preview the import

**Configuration data import selections:**

Import into which company?    ABC Organization: ABC Organization

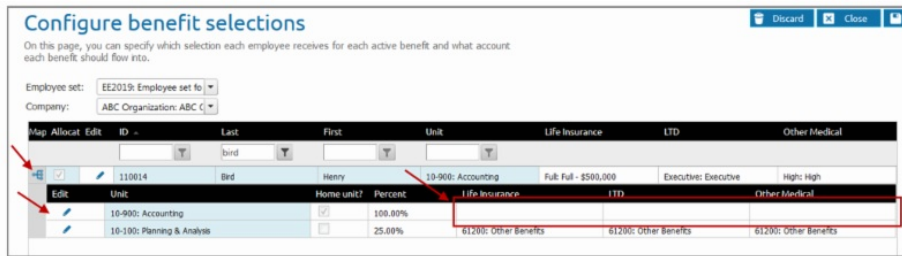
Import what?    Benefit/account mapping

**Export to Excel**    Export entire configuration to Excel

**Export to CSV**

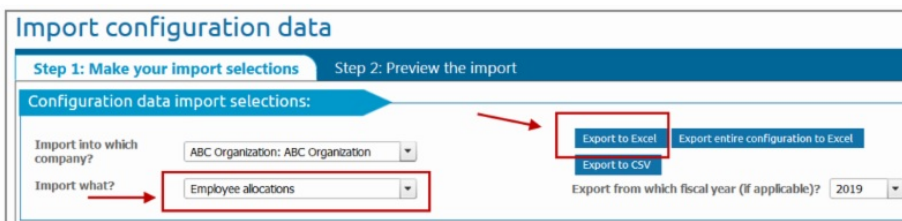
Export from which fiscal year (if applicable)?    2019

After the re-import of the employee set, employees with a new home unit will not have benefit/account mappings. The mappings from the previous home unit do not transfer to the new unit.

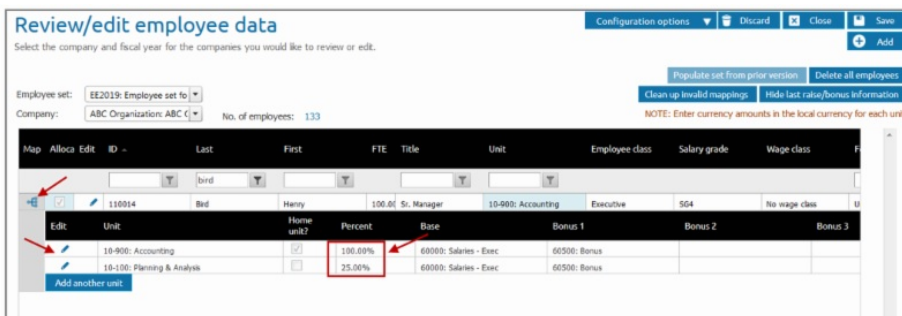


- The benefits/account mapping template that was exported prior to the employee data import can be adjusted to reflect the new home unit and imported back into BudgetPak.

Employee allocations are impacted in the following manner: Allocated employees, whose home units have changed, are automatically assigned an allocation percentage of 100% in the new home unit. This creates allocation percentages that exceed 100% in BudgetPak. To correct the allocation percentages, export out the 'Employee allocations' template on the **Import/export config. data** page.



Make the appropriate adjustments to the impacted employees and re-import the template back into BudgetPak. Alternatively, these adjustments can be made manually on an employee by employee basis on the **Edit employee data** page.



## XLerant Learning Series Webinars

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

Our next webinar is scheduled for Thursday, February 14th

Topic: Administrator Tips & Tricks for  
Import/Export and Validation/Initialization

[Register Now!](#)

Our last webinar was on [End User Budgeting - Beyond the Six Budget Methods](#).

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 - Failed Forgery



A master forger forged a U.S. \$100 bill. The bills he made were perfect copies of the original in every detail, yet he was caught. How?

[Give Up?](#)

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