



The XLerant NewsPak

News from Client Services

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Our Perspective

How is the CFO's role changing? A recent Entrepreneur article by David DeWolf captured the essence of this new kind of leader.

[Visit our blog to read more.](#)

Hello Joanne,

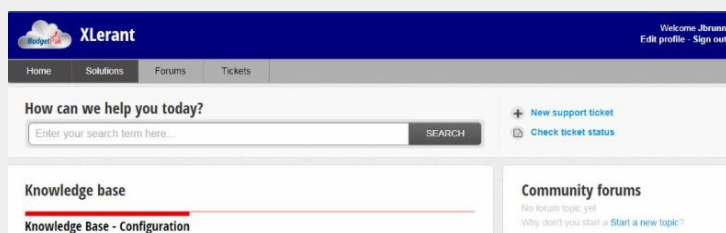
I hope you enjoy this edition of the XLerant NewsPak where you can find out about new features, learn a clever way to do something, and find out what's happening in the XLerant community.

Warm Regards,

Joanne E. Brunn, EVP Client Services and Product Development

XLerant Support Desk

This system will replace the client support portal on www.xlerant.com. You will be receiving an invitation to the new system shortly.



Features include:

- **Easy Access** - cloud service, self-service password reset.
- **Ticketing system** - all of your requests to techsupport@xlerant.com will now be logged and tracked online. You will be able to check the status and review the entire history of your requests in one area.
- **FAQs and Knowledge base** - access to an extensive knowledge base of data so that you can quickly search and get quick answers.
- **Community Forum** - we will be setting up an area where you can talk to other clients, suggest ideas to improve BudgetPak, and vote on existing suggestions.

We are really excited about this new system and hope that you find it enhances your customer support experience.

You Asked...We Delivered

The following new features are available in the cloud version and ready for use:

- Budget benefits by individual employee.
- Single Sign-on - easily integrate your directory system with BudgetPak's login access.



- Ability to import notes when importing account data.

These new features will be released shortly:

- Preserve notes when copying from Budget to Reference versions.
- Bulk load options for configuration changes
- Configuration page redesigns for improved performance and additional ease of use functionality such as drag and drop.

Our upcoming new features include:

- Scenario Modeling - ability to have multiple sets of employees, calculations and drivers per fiscal year.

How do I...?



Q. How do I know who is active in BudgetPak when I need to make configuration changes?

A. In Configuration > Users & Locks there are 3 categories: User, Budget and Company

1. User: Shows the last time the user logged into BudgetPak.

- If the user shut down the browser or walked away and timed out, 'locked' will be checked. This will be updated the next time the user logs in.
- If the user logged out using the BudgetPak "Log out" button the user will not be 'locked.'
- Data in this category is informational only and will not prevent the administrator from performing configuration changes.

2. Budget: If a budget is locked, a user may currently be working in a budget, and the administrator is warned not to make configuration changes.

- A budget is locked for editing until either 24 hours from the last time a user started to edit it, or until that user leaves the budget and goes to a different budget, or logs out.
- The BudgetPak administrator can forcibly unlock a version and unit from here. This is useful in resolving problems such as the following:
 1. Mary is actively editing a budget; she gets called away to a meeting that lasts 4 hours. In the meantime, someone else needs to edit that budget, or you need to do configuration work on the system.
 2. Joe is actively editing a budget; his computer crashes and instead of rebooting and going into BudgetPak again, Joe decides to call it a day and go home. BudgetPak has, of course, no idea that Joe is gone, and still has his budget locked.

Note: a budget that is locked for editing will prevent the ability to 'rollup' in the Status screen.

3. Company: This category shows if a company has validation and initialization pending.

Out & About

Thank you!

A big "Thank you!" to our wonderful clients, Anne Ilcus from Palm Beach Atlantic University and Doug Frood from Southern Adventist University, for participating in the recent ABACC webinar.



Collaborative Budgeting Webinar

Listen to the "Building Collaborative Budgeting" Webinar or share with a friend. Remember that XLerant's Client Referral Program allows you to earn a reduction on your next year's subscription fee by referring another organization to XLerant ... and by them becoming a client.
[Watch the webinar video here.](#)

New Orleans!

Come visit us at the SACUBO Conference from April 19-21 in New Orleans!



Thinking Differently - Remains

We know that you, our clients, think differently than the masses about the importance of ownership and participation in the budgeting process.

To help you keep that edge, here's a lateral thinking puzzle:



There are a carrot, a pile of pebbles, and a pipe lying together in the middle of a field.

[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

[Forward this email](#)



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