

The XLerant NewsPak

News from Client Services - June 2012

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Did You Know...

* You can designate individual accounts as 'restricted' (Config - >Accounts) which cannot be seen by users unless their user role has that capability.*
* You can include instructions (Config - >Accounts) concerning an account to the budgetholder, which can be displayed by hovering over the 'i' on the budget methods screen. *

Our

Welcome Back!

Hello Christine ,

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, VP Client Services

It's waiting for you....

The latest release is waiting for you to install and use. Take advantage of BudgetPak's sophisticated but easy to use **Headcount Allocations** feature, the ability to create complex calculations with the **Multi-level Calculations** features, and the increased flexibility of the **Drivers** functionality.



Thinking differently

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



To help you **keep that edge**, here's a lateral thinking puzzle:
Bob and Sam were identical twins born in London in 1911. Bob was born before Sam, but Sam was older than Bob. How come?
[Give up?](#)

How do I...?

Perspective

The Moon Shot for Higher Ed. Make College Affordable.

[Go to the blog to read on](#)

Q. I want to set up pre-defined lists of assets for my budgetholders to use for planning purposes and I want to control the asset value and cost. How do I do that?



A. This is a 3-step process.

1. First **configure your asset classes**, such as laptops, furniture, printers. The same asset classes are used across all fiscal years, but the base cost associated with each entry may vary year by year. Choose:

- Leased - the base cost will be applied each month the asset is placed in service,
- Depreciated - the straight-line depreciated base cost will be applied each month the asset is placed in service, or
- Expensed - the base cost will be applied once, in the each month the asset is placed in service for each asset class.

2. Next, for each asset class, **configure the individual assets**; this is called the asset library. You can pre-define library entries, with pre-designated terms and base cost.

3. Finally, **enable units to use assets**. In Config -> Units, for each unit that should be able to use assets, click the 'Allow Assets' checkbox. You may include or exclude the availability of asset classes from specific units with the asset class mapping checkboxes in the Units configuration screen.

From the budgetholders' perspective, they will see an Asset stack in their budget navigation map. They will be able to select assets from your pre-defined list and add them to their budget. In addition, budgetholders can create their own on-the-fly assets in one of the pre-defined asset classes.

Please see **Section 3.15 Asset classes and asset library** in the BudgetPak Configuration and Reference manual, for more information.

Blogging about Baldrige

We are thrilled that XLerant's webinar, *Using the Malcolm Baldrige Criteria for Evaluating Initiatives*, starring Linda Murphy Church from the Rhode Island School of Design, was picked up by Blogrige, the Official Baldrige Blog.

The Blogger talks about the various ways the **Criteria for Performance Excellence** has been used, noting this new usage by RISD. [Go to the Blog.](#)

BLOGRIGE

the official Beldridge blog



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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