

The XLerant NewsPak

News from Client Services - October 2013

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Our Perspective

Most higher ed institutions have limited financial and IT resources, so using Cloud-Based software (also known as SaaS or Software as a Service) allows those stretched resources to **achieve more with less**.

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

Welcome Back!

Hello Christine ,

Enjoy this Haunted Edition of the XLerant NewsPak!



Happy Halloween!,

-Joanne E. Brunn, VP Client Services

How do I...?

Q. Can I have my users work on a current Forecast at the same time as the upcoming Budget?



A. Yes, you can **work on multiple fiscal years at once**. BudgetPak allows for the ability, for example, to work on a Q4 forecast (FY2013) while working on the next year's budget (FY2014).

BudgetPak will require that you designate the currently active fiscal year. The currently active fiscal year would typically be set to the fiscal year for the upcoming Budget. This would allow that fiscal year, e.g. 2014, to be conveniently pre-selected in all configuration screens. It also prevents data from being entered into the wrong fiscal year, e.g. employee data, by disallowing

some configuration changes to any but the current fiscal year. The Administrator can, of course, override this when necessary.

Step 1: Go into Configuration>Versions. On the upper right, select the currently active fiscal year from the drop down box.

Step 2: On this same page, designate the appropriate baseline, signoff, percent increase, and spreading basis versions for both the current Forecast and upcoming Budget versions.

Step 3: If you need to override the current fiscal year, e.g. to adjust employee data for the prior fiscal year, go into Configuration>Validation. Check the "Override FY lockout" box and you will be able to select a different fiscal year in any configuration page.

Upcoming NJEdge Conference - November 20-22



We are a sponsor at the upcoming Digital Reality conference sponsored by NJEdge from November 20-22 in Plainsboro, New Jersey. NJEdge is a non-profit technology consortium of academic and research institutions in New Jersey.

[Click here](#) to read more...

CCBO & EACUBO Conferences

East Coast and West Coast - Higher Education Clients



We had a great turn-out at our booth and for our CEO, Ted Dacko's presentation, "Why Cloud-based Budgeting is Perfect for Community Colleges" at this year's [CCBO annual International Conference](#) in Palm Springs on September 28th - October 1st.

We also saw a lot of activity at our booth at this year's annual [EACUBO conference](#) in Baltimore



on October 6-th -9th.

Thinking differently - The Stranger in the Bar...

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:

Two men went out for a drink together in a bar. One of them looked up, saw a tall, dark stranger looking like death and drinking soda water, and pointed him out to his companion. Startled and uneasy, the two men left and went to another bar some miles away. After a few minutes they looked up and saw the same sad, pale stranger drinking soda water. Deciding to leave, they went to a third bar, which was empty except for a young couple. However, within a few minutes the cadaverous man appeared and, in a slow, sad voice, ordered a soda water. Almost out of his mind, one of the men went over to him and said, "Who are you and what do you want?" What did the man answer?



[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?

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