The XLerant NewsPak

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Industry Buzz

bpm PARTNERS

Congratulate yourself for being ahead of the curve. BudgetPak's "unique approach [in] supporting a culture of budget accountability... while increasing accuracy and collaboration across the enterprise" was recognized by BPM partners, a prestigious third-party source.

Welcome Back!

Greetings,

I hope you enjoy this second 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

Alert! BudgetPak 3.5 coming September 6th

Our MAJOR new feature:
We are very excited to announce our new embedded excel solution, myXL, that will allow you to do **Dynamic Custom Reporting, Ad-hoc Analysis and Reporting, and Modeling and Calculations** securely inside your BudgetPak application.

myXL can be used for:

- Dynamic custom report workbooks that can be set up once and used by multiple departments throughout the year, filtered by selected departments, time periods, accounts, and versions
- Organization-specific additional calculations such as gross margins, EBITDA, and variance trending to reports
- Slicing and dicing, drilldowns and pivoting using Excel's pivot table functionality
- Ad-hoc analysis for expense reduction, revenue growth, headcount redistribution

Bonus' can be accrued monthly in addition to the actual calendar date.

You can do a second raise in the middle of the year.

- Distribution of calculated amounts across many different departments all at once
- Pre-built complex revenue, allocations or other models

Click here to read more

Applause for our beta testers: Jeff Ginsberg from Bunker Hill Community College and Dee Boyd from Baptist General Convention of Texas

Note: In order to upgrade to this release, you must be using Microsoft .NET framework 3.5 and SQL Server 2008 Reporting Services.

How do I... ?

Q. *How do I set up occasional and part time employees to receive no insurance or retirement calculation?*

A. **We heard you.** In the September 1st release, we have enhanced BudgetPak to directly support separate calculations by employee class. These 2 additional formulas are:
$[A] Per Head by Employee Class
[A]% of total compensation by Employee Class

The Configure Calculations screen now has a set of rows for each employee class, allowing the formula to be configured differently for each. For example, if there are two employee classes, Exempt and Non-Exempt the calculation for class 'Exempt' can be set to 5% of total compensation versus 7% of total compensation for class 'Non-Exempt'.
Prior to this, you would have had to put these employees in a separate unit, create 'dummy' salary accounts for each class of

employees, create a set of 'dummy' calculated accounts and then map employee events by class.

Stretch Your Brain

Leadership Business Officers Panel
September 27, 2011   2:00 EST

Are you in EDU? Hear how Business Officers like you have led efforts on their campuses to improve the budget process and embrace the new normal. Register here

Help your budget holders understand **why you choose BudgetPak** and how it helps to energize a culture of budget accountability by encouraging them to View Webinar Archives .

Client Profile

We wouldn't be us without you!

This month we would like to profile **Drew University**. Click here to find out what happend when they invited their department heads to be involved in the selection process.

Howard - Thank you for allowing us to interview you for this case study.

Odds N Ends

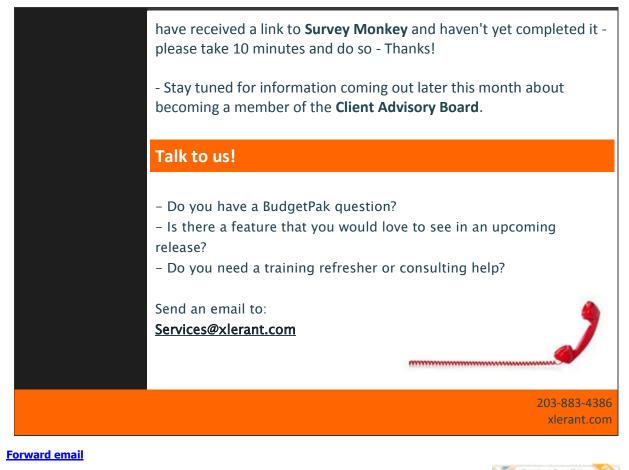- Meet **Sal Arena,** our new Vice President of Sales.

- Make plans to join us for our **User Conference Webinar in September** highlighting our exciting new embedded Excel solution - 'myXL.' Look for your invitation in a few weeks.

- Take a look at our new **Our Solution** section of XLerant.com.

 - Thanks to those of you who completed the on-line survey - if you

have received a link to **Survey Monkey** and haven't yet completed it - please take 10 minutes and do so - Thanks!

- Stay tuned for information coming out later this month about becoming a member of the **Client Advisory Board**.

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?

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Forward email