

The XLerant NewsPak

News from Client Services - February 2012

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Did You Know...

* We have a self guided end user tutorial that is accessed via our website and then run locally. Take a look and see if you think it will meet your needs.

[Click to access the tutorial.](#)*

Our Perspective

Solving Ambiguous Problems - What Successful Companies Get That the Rest of Us Don't
[Go to the blog to read on](#)

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

Save the date: User Conference Webinar - March 20

I hope you will join us for the quarterly User Conference Webinar. It will be held on Tuesday, March 20th at 2pm EST.

Topics for the webinar include:

- Company update
- Features in the latest release
- Potential new enhancements
- Forecasting tutorial - how does forecasting work in BudgetPak and how is it different than budgeting
- Your questions

If there is something that you would like me to cover in this or any upcoming webinar, please send an email to Services@XLerant.com



You asked, We delivered

Significant reduction in initialization time:

Customers are experiencing initialization performance improvements of **80 - 90%**. For example, a initialization that used to take 2 hours and 20 minutes, now takes 12 minutes and 33 seconds.

More myXL functions = Better reporting and analysis:

- Subtotals
- Unit Totals
- Headcount functions
- Year-To-Date and Quarterly data retrieval
- Selection of individual months/quarters/YTD

Have you upgraded yet?

How do I...?

Q. Sometimes when we copy a Draft Budget version to the Final Sign-off version, we do not see the Sign-off button. Why does this happen?



A. The Sign Off button will not appear unless the logged in user has the signoff capability. There are three ways to have this:

1. You are explicitly designated as the Budget Holder for the unit (in Configuration -> Units)
2. Your login role includes the capability "CHG_ALL_BUDGETS" (see Configuration -> User Roles)
3. You are a super-administrator (your login role includes the capability "SUPERADMIN")

The following do not confer signoff capability:

1. You are designated as a budget assistant (in Configuration -> Units).
2. You are the budget holder of unit(s) higher in the hierarchy. (You can see this unit - but you can't sign it off.)

Please see section 1.11 of the reference manual, "1.11: What is a budgetholder? Assistant budgetholder?", for more information.

Client Profile

We wouldn't be us without you!

We are thrilled when you, our customers, get involved in our webinars. On March 8th, Linda Murphy Church from the prestigious **Rhode Island School of Design** will discuss how she applied the rigorous Malcolm Baldrige Excellence criteria to first evaluate, and then justify changes to the university's budget process.



The **Malcolm Baldrige** Program's mission is to improve the competitiveness and performance of U.S. organizations. It recognizes national role models and honors them with the only Presidential Award for performance excellence. Award winners are chosen by a select panel of business professionals.

[Click here](#) to join us.

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



203-883-4386
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