Rather view a webpage version of this email?

The XLerant NewsPak

News from Client Services - January 2012

In This Issue

Did You Know...

* You or your users can save your favorite report configurations by clicking "Save current selections as new saved report" in Advanced Reporting. *

* To review assets only: in Advanced Reporting, select "by section" in Step 1. Print only the sections related to assets. *

Our Perspective

Rolling Forecast - a False Choice? Can an annual budget and a rolling forecast co-

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

XLerant Receives Funding - Thanks to All of You!

Because of you, our customers, and your support of our products and services, we have secured a significant amount of funding through Chrysalis Ventures, a venture capital firm. They are experienced, smart professionals with a mid-America values focus and we are fortunate to have their expertise on our board. Our CEO, Ted Dacko, worked with them when he was at HealthMedia.

What this means for you, our valued customers, is...

- We will be able to expand our presence in North America.
- XLerant will become even healthier, which makes your investment in us more valuable.
- We will be broadening our Client Services capabilities.
- We will be able to make the product even stronger for your individual needs.

Coming Soon!

exist?

Our Major Enhancement:

Initialization performance improvements- based on feedack from our User Conference webinar in December 2010, we have made major changes in the initilization process that will significantly reduce the initialization time. We expect to release this later this quarter.

Enhancements and Convenience Features:

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

Ability to **designate unit sort order** - which will allow you to decide how the units are ordered across BudgetPak - in reporting, version selection, status and all unit selection drop-downs and selections.

Now when you **enter values into any grid** in BudgetPak, as soon as you start typing, the contents of the cell are erased, which is similar to how Excel works.

How do I...?

Q. How can I give the budget holder of a rollup unit permission to edit the units under that rollup unit?

A. In order to ensure full accountability over your budgets, BudgetPak does not automatically grant the budget holder of a

rollup unit permission to edit their 'child' units. Only the super administrator and named budget holders are allowed to edit any unit, so you always know exactly who is responsible for your numbers. If you want to give a roll-up manager the ability to edit units, she or he must be the budget holder or assistant budget holder for those units.

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!

Our latest press release highlights our 5 new Higher Ed clients. Click here to read about how BudgetPak matched up against the Malcolm Baldrige Excellence in Higher Education framework.

Thank you, Linda, Holly, Steve, Bob, and Phil for participating in our press release.

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?

Send an email to:
Services@XLerant.com

203-883-4386
xlerant.com

Forward email