We 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.

Thank you,

The XLerant Client Services Team

The XLerant NewsPak - July 2018

XLerant's 2nd Annual BudgetPak Conference
There will be workshops for new and experienced administrators with highlighted best practices in various functional areas.

Registration is now open!
Monday, October 1st - Wednesday, October 3rd
at the Sheraton Ann Arbor Hotel
Click here for more information, and to register

Registration includes all workshops, a meet and greet event Monday evening, breakfast, lunch and dinner (out in Ann Arbor) Tuesday, as well as breakfast and lunch on Wednesday.

We are working on our final agenda. In the meantime, you can click here to see a list of proposed topics.

2018 BPM Pulse Survey
XLerant is ranked #1 in Ease-of-Use, Customer Support, Price-for-Value & More!
Thank you so much to all of you who participated in the most recent BPM Survey!

We are pleased to announce that BudgetPak has been top-ranked for ease-of-use for the third year in a row, according to results from the 2018 BPM Pulse of Performance Management Survey.

XLerant topped 14 other BPM software providers to achieve the #1 ranking in: Ease-of-Use, Customer Support, Price-for-Value, Ease-of-Doing-Business, Training, and Consulting.

Included for the first time this year, the 2018 BPM Pulse Survey also collected a Net Promoter Score: an index that measures a customers' willingness to recommend a company's products or services to others - gauging overall satisfaction and brand loyalty. Our customers gave us a Net Promoter Score of 92 out of 100 - topping all other vendors in the survey. Read the Press Release.

We wouldn't be us without you!
-Joanne Brunn, CEO

You asked…we delivered
Our next release of BudgetPak will include these enhancements:

- **Clone of New Hire** - the ability to add one new hire, and then clone the new hire within the unit and budget version.
- **Bulk Salary Increases for Hourly Employees** - new configuration action allowing the administrator to push out salary increases to hourly employees.
- **Dashboard** - charts and graphs showing key performance indicators, progress to budget completion, headcount information, consolidations by unit or subtotal comparisons and key variances.
- **Monthly Benefit By Employee** - change the rate of individual employee benefits by month, allowing the ability to show a mid year rate increase.
- **New Versions Guide -** the guide will walk you through all the steps of adding a new version, or changing an existing version.
- **Multiple Sign-off Versions** - the ability to have more than one sign off versions within a fiscal year.
- **Baseline version changes** - you will have the option to no longer have a baseline budget version. Alternatively, you can have multiple baseline budget version, which will allow you to build different scenarios more easily.
- **New Reporting Options**
  - Include or exclude ActionPaks from P&L reports
  - Option to add a percent of budget remaining variance to some reports
  - Ability to run all headcount reports from a rollup unit level

Did you know?
How do I copy my entire budget into a new version?

You can create a new version in BudgetPak that is an exact copy of your current budget or forecast for all units, at once. There are two types of copies that you can make:

1. Copy to Reference: This option creates a new 'reference' version of your budget/forecast. A reference version only contains account values from your budget/forecast. This means that line item detail, employee information,

ActionPaks, or assets will not appear in the reference version, but the impact of them will show in the total account values. Budget holders are not able to edit reference versions, but they can use them to compare against in reporting.

> This is a good option if you would like to lock down the numbers in order to report on them, and you would like to have those numbers be retained in BudgetPak so you can tie back to them again in the future.

2. Copy to New: This option creates a new budget/forecast versions with all the same parameters of the original version. It will also contain all the added detail that budget holders have included in their budgets, such as line item detail, new hires, notes, assets and files.

> This is a good option if you would like to create an alternate version of your budget where the budget holders, or the finance team, can make adjustments to it.

On the **Define Versions** page of the Configuration menu, you will see these two options listed next to each budget or forecast version, as shown below.

Edit	Fiscal year	F/X set	Version code	Description	Employee set	ATB spreading set	Unit event defaults set	Admin file set	Prepop source?	Show GL detail?					
✏	2019	R2019	FY2019-B-3	2019 Draft 1	EE2019	ATB2019	UED2019	AF2019	☐	☐	Delete	Erase	① Copy to Reference	② Copy to New
✏	2019	R2019	FY2019-B-5	2019 Draft 2	EE2019	ATB2019	UED2019	AF2019	☐	☐	Delete	Erase	Copy to Reference	Copy to New
✏	2019	R2019	FY2019-B-11	2019 Draft 3	EE2019	ATB2019	UED2019	AF2019	☐	☐	Delete	Erase	Copy to Reference	Copy to New
✏	2019	R2019	FY2019-B-6	2019 Final Budget	EE2019	ATB2019	UED2019	AF2019	☐	☐	Delete	Erase	Copy to Reference	Copy to New
✏	2019	R2019	FY2019-D-15	2019 Budget - Growth Plan	EE2019	ATB2019	UED2019		☐	☐	Delete	Erase	Copy to Reference	Copy to New
✏	2019	R2019	FY2019-D-16	2019 Budget - Conservative Plan	EE2019	ATB2019	UED2019		☐	☐	Delete	Erase	Copy to Reference	Copy to New

Depending on what you are trying to accomplish, you may choose one or both of these options.

XLerant Learning Series Webinars
We will be covering new features as well as providing refreshers on current features.

Our latest webinar covered Advanced Reporting and myXL
To watch it, click **here.**

To watch recordings of some of the other webinars we have had in the past, please click here.

For suggestions on what to cover in future webinars, please contact us at Services@XLerant.com.

Thinking Differently - School Friend

Joe went back to his hometown and met an old school friend he had not seen for years. His friend said, "I am married now but not to anyone you know. This is my daughter."
Joe turned to the little girl and asked her her name. She said, "I have the same name as my mother."
"Then you must be called Louise," said Joe. He was right, but how did he know

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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