

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 - September 2018

XLerant Thought Leadership Series

We have a series of e-books and whitepapers dedicated to the mission of engaging employees, empowering finance managers and department heads to make more informed decisions so that the strategic objectives of the organization can be met.

[Achieving Alignment: Linking Planning with Resource Allocation & Assessment](#)

In this guest-speaker webinar, Larry Goldstein, CPA, presents a detailed review of the key issues and considerations leadership teams must address to effectively link organizational planning efforts with the right resources. And of course, how to ensure those efforts are adequately assessed and measured. Topics of discussion include:

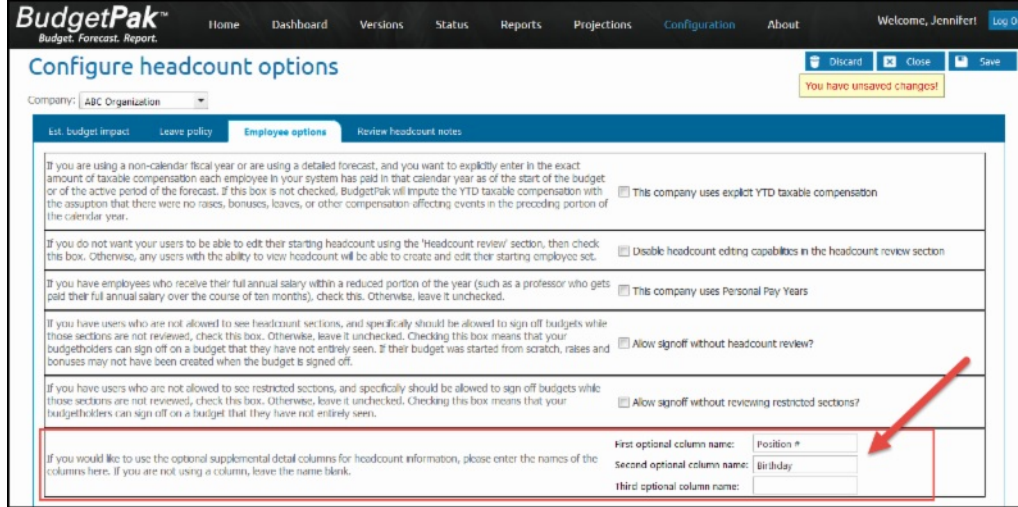
- How to structure your efforts for success
- Key infrastructure and process requirements
- Who should be involved - engaging key stakeholder groups
- Assessment - how you measure results

Did you know?

How do I create custom fields related to employee information?

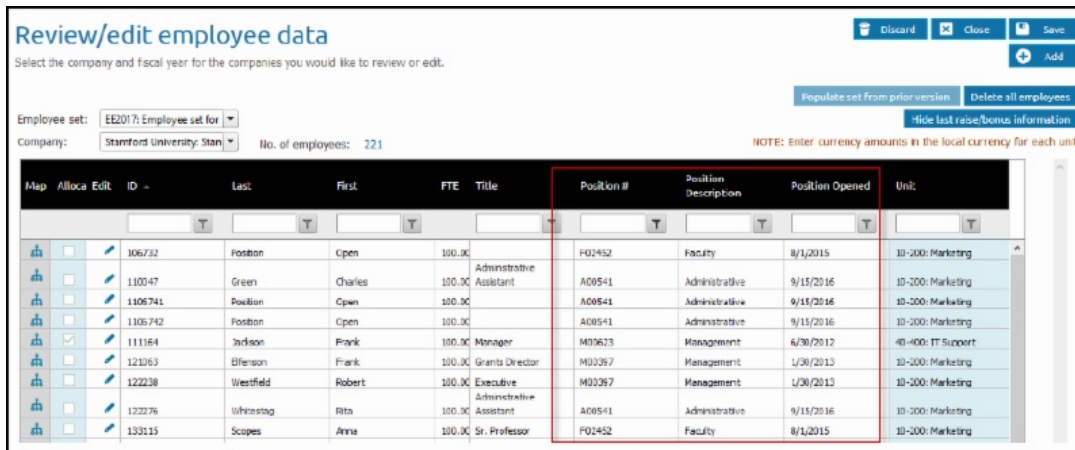
Employee data in BudgetPak can include up to 3 optional user-defined fields. These fields can be used to record and display additional information concerning the employee. For example, position number or birthday.

The field names are designated on the **Configure headcount options** page under "employee options":

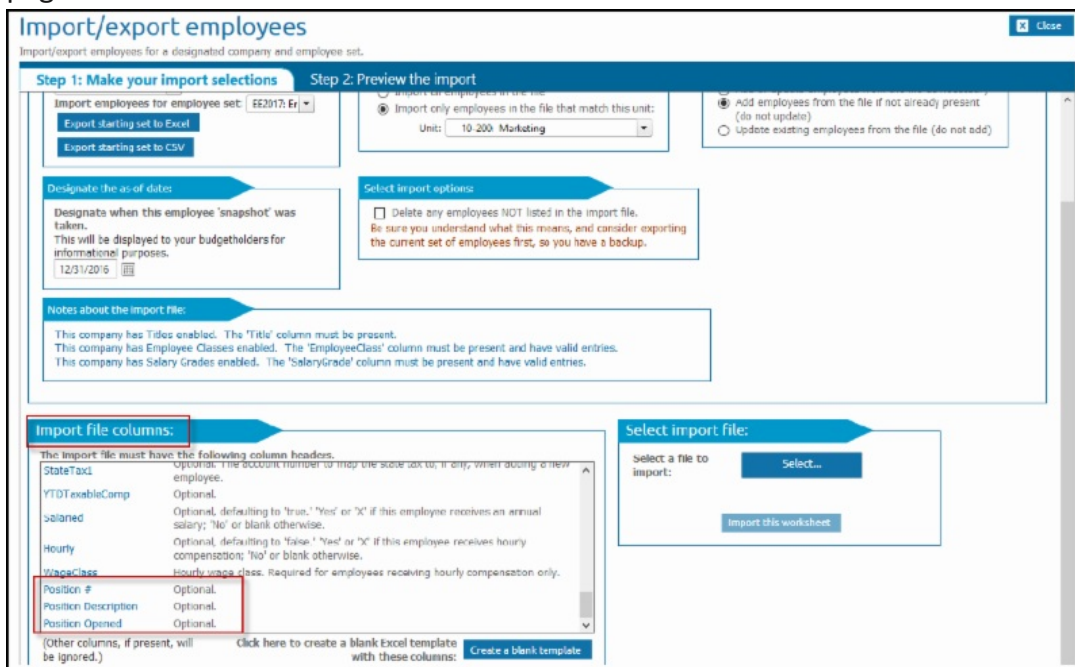


Once they are configured, the fields are available for data entry and display along with other employee information, such as employee class or FTE.

The configured fields can be entered and edited on the "Edit Employee data" configuration page:



Alternatively, the configured fields can also be imported in bulk along with the other employee information on the "Import/export employee data" configuration page:



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.

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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