



The XLERANT NewsPak - November 2018

Our Blog

How Organization Culture Impacts Financial Planning & Performance

Culture impacts financial planning & performance. This was a hot topic at NACUBO - a conference for business officers and financial leaders we recently attended. While the conference was for higher education institutions - the themes we heard transcend industry borders. These issues impact the financial planning, budgeting, and bottom-line of businesses, governments and non-profits alike. [Want to read more?](#)



Did you know?

How do I update my budget to include raises for hourly employees?

The BudgetPak administrator has the ability to apply an across-the-board raise to some or all hourly employees in an existing budget. This can be done from the **Edit hourly employee data** configuration page.

Edit hourly employee data Discard Close Save

You can use this page to define the default wage and expected annual hours for employees marked as receiving an hourly wage. These values are starting points for your budgetholders, who may enter exact values on a monthly basis if they choose.

Employee set:
 Company:

Type ID	Last	First	Title	Employee class	Home	Actions
134148	Lennon	Rolf	Electrician	Hourly - Monthly pay	10-200: Marketing	Update existing budgets with hourly defaults Apply hourly raises to existing budgets
147917	Vazquez	Traci	Electrician	Hourly - Monthly pay	10-200: Marketing	
177976	Tieman	Anabel	Groundskeeper	Hourly - Semimonthly pay	10-200: Marketing	
198697	Merritt	Sidney	Groundskeeper	Hourly - Semimonthly pay	10-200: Marketing	
216555	Knudsen	Ethan	Plumber	Hourly - Monthly pay	10-200: Marketing	
311209	Kitchens	Brendan	Custodial	Hourly - Semimonthly pay	10-200: Marketing	
317063	Gibert	Angela	Electrician	Hourly - Monthly pay	10-200: Marketing	
326049	Hindle	Ernesto	Plumber	Hourly - Monthly pay	10-200: Marketing	
326556	Montena	Reagan	Custodial	Hourly - Semimonthly pay	10-200: Marketing	
364465	Scheider	Maryann	Custodial	Hourly - Semimonthly pay	10-200: Marketing	

Select 'Apply hourly raises to existing budgets' from the **Actions** menu, then you will be

prompted through a three-stop guide:

1. On the first step, read the instructions, then designate the version to apply the raise to, the wage type(s), the raise percent, and the effective date. (The raise will actually be effective as of the start of the pay period in which the date falls.)

Apply hourly raises to existing budgets

Designate raise
Select employees
Confirm

Normally budget holders make changes to their budgets and forecasts, including raises for employees. For hourly employees, a raise translates to a new, higher rate.

However, often budget holders do not know the new hourly rates, or else it can be difficult for the organization to coordinate hourly raises across many budget holders. Therefore, this utility is provided as a way for you to 'push out' raises to existing budgets (that is, budgets that have already been started) so that they are consistent and comprehensive.

Please follow these steps to give hourly employees in a selected version a designated raise, starting with the pay period you pick. The effect will be exactly as if each budget holder had gone in and adjusted the hourly rates themselves.

Note the following:

- You can apply the raise to only one version at a time.
- Only already started budgets or forecasts will be affected.
- You must designate the raise as a percent increase from the current hourly rate.
- The raise percent will apply to the current hourly rate for the employee – not the default hourly rates for the wage type. (That is, if the budget holder has already changed the hourly rate, the percent increase you designate will be applied to the changed rate, not the original rate.)
- You can apply a raise to all wage types, or to a single wage type at a time. If you need to apply different raises to different wage types, you'll need to go through these steps once for each wage type.
- There is only one hourly rate for each pay period. Therefore, when you designate the date of the raise, the raise will be effective for the ENTIRE pay period. For example, if you have one pay period for January, one pay period for February, and so on, if you choose 'February 15' as the date of the raise, the raise will be applied to the entire month of February.

Which version would you like to apply raises to? 2019 Final Budget (Budget)

Apply a raise to which wage type (or all wage types)? H: Holiday

What is the raise percent? 2.00 %

Apply the raise starting with which pay period (choose any date within the pay period)? 12/1/2019

Does the raise apply to ALL hourly employees? (If Yes, then there is no need to select employees in the grid.)

Cancel Next

If you choose to apply the raise to **all** employees, the "Select employees" step will be skipped.

2. The second step allows you to designate which employees are to get the raise.
 - You can apply filters to narrow the list of employees in the grid.
 - New hires that have been added into the budget will also appear in the employee listing.

Apply hourly raises to existing budgets

Designate raise
Select employees
Confirm

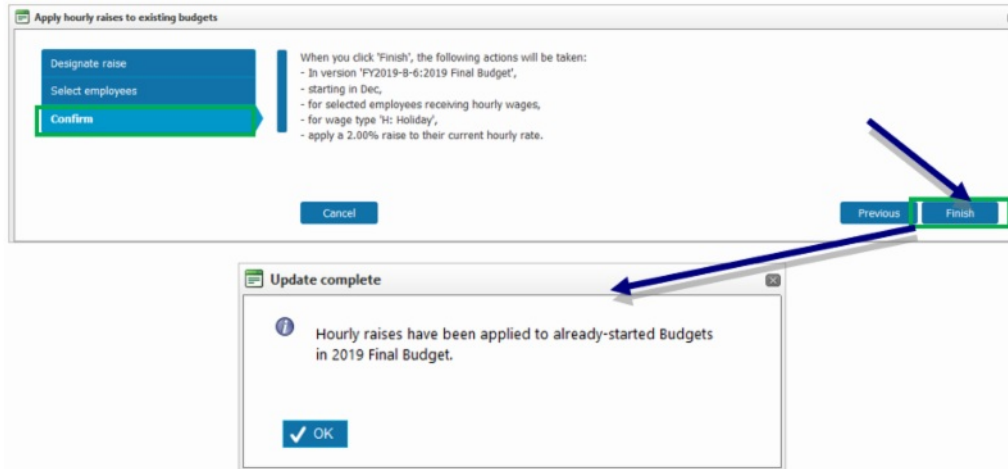
You have designated a 2.00% raise, effective 2019-12-01, for H: Holiday, for version 'FY2019-8-6:2019 Final Budget'

Select the employees you would like to apply this raise to. You can use the filters to specify distinct groups, and also use the checkboxes to identify exactly which employees will receive this raise. Only visible, checked employees will receive the raise.

	Employee ID	Last	First	Home unit	Employee class
<input checked="" type="checkbox"/>	317063	Gilbert	Angele	10-200: Marketing	Hourly - Monthly pay
<input checked="" type="checkbox"/>	326049	Hindle	Ernesto	10-200: Marketing	Hourly - Monthly pay
<input checked="" type="checkbox"/>	364465	Scheder	Maryann	10-200: Marketing	Hourly - Semi-monthly pay
<input type="checkbox"/>	326556	Montena	Reagan	10-200: Marketing	Hourly - Semi-monthly pay
<input type="checkbox"/>	311209	Kitchens	Brendan	10-200: Marketing	Hourly - Semi-monthly pay
<input checked="" type="checkbox"/>	147917	Vazquez	Traci	10-200: Marketing	Hourly - Monthly pay
<input type="checkbox"/>	134148	Lennon	Rolf	10-200: Marketing	Hourly - Monthly pay
<input type="checkbox"/>	198697	Merritt	Sidney	10-200: Marketing	Hourly - Semi-monthly pay
<input checked="" type="checkbox"/>	216555	Knudsen	Ethan	10-200: Marketing	Hourly - Monthly pay
<input checked="" type="checkbox"/>	177976	Tieman	Anabel	10-200: Marketing	Hourly - Semi-monthly pay
<input type="checkbox"/>		New Hire		40-600: Human Resources	Executive
<input type="checkbox"/>		New Hire		40-400: IT Support	Full Time
<input type="checkbox"/>		New Hire		10-200: Marketing	Hourly - Semi-monthly pay
<input type="checkbox"/>		New Hire		10-200: Marketing	Hourly - Semi-monthly pay

Cancel Previous Next

3. The last step allows you to review and confirm the changes you are making, then click **Finish** to apply the raises.



Additional considerations to keep in mind:

- Hourly raises can only be applied to 1 budget or forecast version at a time.
- Only already started units in the budget/forecast will be affected.
- The percent increase is based off of the current wage rate in that budget/forecast (not the default).
- There is only one wage rate per pay period, so when the date of the raise is designated, it will be effective for the entire pay period.
- Validation and initialization will be needed after applying the raises.

XLerant Learning Series Webinars

We will be covering new features as well as providing refreshers on current features.

Our next webinar is scheduled for Thursday, December 6th

Topic: Highlights from the Latest Release

To register, 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 - Where in the World?

In what place would you find Julius Caesar, the biblical Rachel, King David, Pallas Athena (the Goddess of War), King Charlemagne, Alexander the Great, Queen Elizabeth I of England, and Sir Lancelot all together?

[Give Up?](#)

[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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