



The XLerant NewsPak - May 2019

Our Blog

Top 5 Drivers for Better Budgeting

Admittedly, we're preoccupied with "better budgeting". We do a lot of research on the topic - and ask a LOT of questions:

Why did you choose a decentralized or collaborative approach? What made you decide to leave Excel? How do you measure success? What is your budgeting ROI?

Here are the top 5 most common answers to our questions from finance leaders on what drives their search for better budgeting, and why... [read more](#)



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, June 20th

Topic: Different Approaches to your Budgeting Process using Multiple Versions

[Register now](#)

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.

Did you know?

How do I lock out users from making changes to the budget while Finance reviews and makes final adjustments?

There are a few different approaches that can be taken:

1. **Update User Roles** - from the User Roles configuration page, roles can be

modified to not allow the user to change budgets or headcount. This would give these users view-only access in BudgetPak. Editing user roles does not require a validation/initialization.

Roles			Edit	Role code	Description	Super admin	View Config	Change Config	View All Budgets	Change All Budgets	View Budget	Change Budget	View / Change Headcount	View Headcount Report	Change Headcount Allocations	View Restricted	View Restricted Report	View Hidden Versions	Create Projections	View Transactions	Receive CC emails
<input checked="" type="checkbox"/>	Level 1	Level 1 Access										<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
<input checked="" type="checkbox"/>	Level 2	Level 2 Access										<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
<input checked="" type="checkbox"/>	Super Admin	Super Administrator																			

2. **Edit the version to be hidden** - from the Define Versions configuration page, the budget version can be designated as hidden. Only Super Administrators would be able to access that hidden version in BudgetPak. Other users would not see it as an option for selection on the Versions page or on the Reporting pages (unless their user role allowed them to see hidden versions). Changing a version to hidden will require a validation/initialization.

Select the currently active fiscal year:	2019	Comparison 1	Comparison 2	Comparison 3	Budget copy restrictions								
Define comparison versions:	2019 Target Budget	2018 Final Budget	2018 Actuals										
<input type="checkbox"/> Show versions in fiscal year order					Detailed Forecast Info								
<input checked="" type="checkbox"/> Show forecast columns													
Fiscal year	E/P set	Version code	Description	Version type	First period in version	Last period in version	Read-only	Active	Hidden	Baseline	Signoff	Percent increase basis version	Spreading basis version
2019	R2019	FY2019-B-11	2019 Draft 3	Budget	Jan	Dec	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2018 Forecast	2017 Actuals
2019	R2019	FY2019-B-6	2019 Final Budget	Budget	Jan	Dec	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2018 Forecast	2017 Actuals

3. **Disable users** - from the Users configuration page, users can be disabled from logging into BudgetPak by checking the Disabled box next to each user. Editing users does not require a validation/initialization.

Disabled	First name	Last name	Role	BudgetPak login	Email	BudgetPak password	Do not require password change after 1st use	Create/Change BudgetPak password
<input type="checkbox"/>	Xlerant	Administrator	SuperAdmin	Xlerant	xxxxxxxx	xxxxxxxx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bill	Alerton	SuperAdmin	bill	billerton@xlerant.com	xxxxxxxx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Henry	Biggs	Level 2	Biggs	hbigs@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Mike	Brown	SuperAdmin	Brown	mbrown@xlerant.com	xxxxxxxx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Steve	Brubaker	Level 1	Brubaker	sbrubaker@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Jeanne	Brunn	SuperAdmin	jbrunn	jbrunn@xlerant.com	xxxxxxxx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Fred	Burns	Level 1	Burns	fburns@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Dean	Cantor	Level 2	Cantor	dcantor@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Barbara	Dean	Level 1	Dean	bdean@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Susan	Gallant	Level 1	Gallant	sgallant@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Olive	Hastings	Level 1	Hastings	ohastings@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Burt	Hansderson	Level 1	Hansderson	bhansderson@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Jon	Jones	Level 2	Jones	jones@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Martin	Long	Level 1	Long	mlong@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Steve	Lott	Level 1	Lott	slott@xlerant.com	xxxxxxxx	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Any one of these approaches will allow the Super Administrators to continue editing the budget version as needed, until it is finalized.

XLerant Community Forums

Start or Join a conversation in the Forums section of our support site

One of the most popular activities at the User Conference was networking and learning about each other's budgeting process. We have set up the following 4 areas:

- Share best practices
- Feature Requests
- How are other organizations using...?

- Ideas for new forums, webinar topics, or anything on your mind

Check out our new forum - myXL usage tips and tricks and [join the conversation](#)

The screenshot shows the homepage of the BudgetPak Xlerant forum. At the top, there's a dark header with the Xlerant logo and a search bar. Below the header, a large banner asks "How can we help you today?" with a search input field and a "SEARCH" button. Underneath, a section titled "Community forums" lists several categories: "Xlerant Forums", "Announcements (0)", "Feature Requests (0)", "Share Best Practices (0)", "How are other organizations using...? (1)", and "Ideas for new forums, webinar topics, or anything on your mind (0)". A red arrow points to the last item, "myXL usage tips and tricks".

Be sure to "**Follow**" topics you are interested in to get notified of other responses!

Thinking Differently - Dutch Race



One of the most prestigious races in Holland involved many people and enormous organization. But nobody knows when it will be held until two days before the race. Why?

[Give Up?](#)

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