



## 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](mailto: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 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.

**Configure user roles**

User roles are groupings of system capabilities. For each role you define, click off the capabilities you would like for that user group.

Roles	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	Rec'd CC email
Level 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SuperAdmin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 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.

**Define versions**

Select the currently active fiscal year, and configure the versions within each year.

Select the currently active fiscal year: 2019

Define comparison versions: Comparison 1 (2019 Target Budget), Comparison 2 (2018 Final Budget), Comparison 3 (2018 Actuals)

	Edit	Edit (guide me through)	Fiscal year	F/Y 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 version
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2019	R2019	FY2019-0-11	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
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2019	R2019	FY2019-0-6	2019 Final Budget	Budget	Jan	Dec	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2018 Forecast	2017 Actuals

- 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.

**Configure users**

In this section, you may define the specific users of the system and assign them to specific roles.

Company: ABC Organization

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		*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Bill	Albertson	SuperAdmin	bill	balbertson@xlerant.com	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Henry	Biggs	Level 2	hbiggs	hbiggs@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Mike	Brown	SuperAdmin	mbrown	mbrown@xlerant.com	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Steve	Brubaker	Level 1	sbrubaker	sbrubaker@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Joanne	Burns	SuperAdmin	jburns	jburns@xlerant.com	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Fred	Burns	Level 1	fburns	fburns@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Dean	Cantor	Level 2	dcantor	dcantor@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Barbara	Dean	Level 1	bdean	bdean@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Susan	Gabert	Level 1	sgabert	sgabert@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Clive	Hastings	Level 1	chastings	chastings@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Burt	Henderson	Level 1	bhenderson	bhenderson@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Jon	Jones	Level 2	jones	jones@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Martin	Long	Level 1	mlong	mlong@xlerant.com	*****	<input type="checkbox"/>	Change password Delete
<input checked="" type="checkbox"/>	Steve	Lutt	Level 1	slutt	slutt@xlerant.com	*****	<input type="checkbox"/>	Change password Delete

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

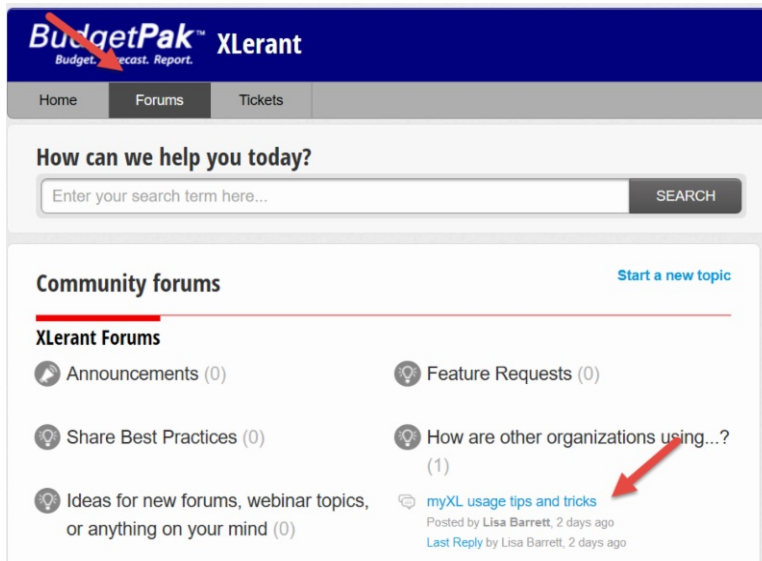
Start or Join a conversation in the Forums section of our support site

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](#)



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?](#)

Xlerant | 203-883-4380 | [services@xlerant.com](mailto:services@xlerant.com) | [www.xlerant.com](http://www.xlerant.com)

