



## The XLERANT NewsPak - July 2019

---

### New Mini-Demos Series

*Presenting our first mini-demo: Headcount Planning*



We are creating a series of mini-demos to showcase BudgetPak and XLERANT for prospective clients. Headcount and salary planning is our first one, providing an overview of our philosophy and highlighting areas of our headcount planning process. For those of you who are not using this feature, it's a quick way (6 1/2 minutes) to understand the benefits and usage.

[Click here to watch the video](#)

---

### XLERANT Learning Series Webinars

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

**Our next webinar is on Thursday, August 29th**  
**Topic: *In Depth Review of Importing Accounts in Bulk***  
[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 save report selections for use in the future?*

When running reports from the **Advanced Reporting** page, you are able to use the

option to **Save current selections as a new saved report**. This will save the report setup, including the unit selections, so that you can run the same report again in the future. Note it does not save the data from the report.

**Advanced reporting** Select a report and detailed options for it. You may also retrieve previously-saved selections. Close

**Step 1: Select a report**

P&L reports: Other reports:

Select the date range:

Annual  
 Quarterly  
 Year to date  
 Monthly

Group accounts by:

By default subtotals  
 By section  
 ActionPaks only

**Step 2: Select the version(s)**

Report on which version? 2019 Target Budget

Compare against which version?  
2019 Budget - Growth Pla.  
2019 Budget - Conservati.  
2019 Actuals

**Step 3: Select units**

The currently-selected units are listed below. Click 'Change unit selections' to select from a list of all units available to you.  
Change unit selections: 7 units selected.

Unit code	Description
ABC Organization	ABC Organization
M & S	Total Marketing & Sales
Sales	Total Sales Offices
Fin	Total Finance
Exec	Executive Offices
SS	Shared Services
IT	Total IT

**Step 4: Select report options**

Show detail or summary rows?

Display detail and summary rows  
 Display summary rows only

What level of detail?

Standard report detail only  
 Include extended detail on report (Files, categories, drivers, line item details)

Suppress rows with all zeroes  
 Exclude variance columns

Which chart of accounts?

Local company chart of accounts  
 Enterprise chart of accounts

Include account notes?  Yes  No

**Step 5: Select currency options**

Report in which currency? USD (\$)

**Step 6: View report**

[View the report](#) Report will appear in a new tab, or a new browser window (depending on how your browser is configured).

NOTE: This report should be printed in landscape mode.  
NOTE: This report should be printed on wide paper (Legal or B4)

You may save your report selections (or retrieve a previously saved selection):

[Run one of my saved reports](#) [Save current selections as new saved report](#) [Update saved report with current selections](#)

Once you have made your selections, click the button to **Save current selections as a new saved report**. You will then be prompted to give the report a description.

You may save your report selections (or retrieve a previously saved selection):

[Run one of my saved reports](#) [Save current selections as new saved report](#) [Update saved report with current selections](#)

Next time you want to view that report, click on **Run one of my saved reports**.

You may save your report selections (or retrieve a previously saved selection):

[Run one of my saved reports](#) [Save current selections as new saved report](#) [Update saved report with current selections](#)

You can also access your saved reports from the **Reports** page:

Select a report to preview:

Unit: 10-200: Marketing  
Version: 2019 Draft 3

**My budget summary**

Run a summary P&L report of 'Marketing', version '2019 Draft 3'

[View](#)

**My budget versus...**

Run a summary P&L report for 'Marketing', comparing version '2019 Draft 3' against...

- ...Prior Year Actuals (version '2018 Actuals') [View](#)
- ...Last Year's Budget (version '2018 Final Budget') [View](#)
- ...Latest Forecast (version '2018 Forecast') [View](#)
- ...Target Budget (version '2019 Target Budget') [View](#)

**My budget decisions**

Run a detailed report listing the decisions that went into the budget for 'Marketing', version '2019 Draft 3'

[View](#)

Or make different report selections:

**Advanced reporting**

Select a different report, or choose different ways to see the above reports.

[View](#)

**Saved report selections**

Run one of my saved reports.

[View](#)

Click **Preview** to run the report again, or **Edit** to get back to the **Advanced Reporting** page to make changes to the selections.

**Saved report selections** Close

This is a list of the report selections that you have previously saved. You may re-run any of these reports with the same selections.

Please note that the DATA from the reports are not saved, but only your selections. You will get the current data as per your selections each time you run the report.

My report description	Report name	Version	Units	AQ	Preview report	Edit selections	Delete	Copy	Rename
Budget Status - 2019 Final Budget	Budget Status	2019 Final Budget			Preview	Edit	Delete	Copy	Rename
Sales - Japan - 2019 Final Budget (\$ Yen)	CPI, by Subtotal by Year	2019 Final Budget	30-100		Preview	Edit	Delete	Copy	Rename
Sales - Japan - 2019 Final Budget (\$ USD)	CPI, by Subtotal by Year	2019 Final Budget	30-100		Preview	Edit	Delete	Copy	Rename
Total Sales - 2019 Final Budget vs 2018 Act	CPI, by Subtotal by Year	2019 Final Budget	Sales, 30-100, 30-		Preview	Edit	Delete	Copy	Rename
Monthly Final 2019 vs. Forecast	CPI, by Subtotal by Month v	2019 Final Budget	Sales, 30-100, 30-		Preview	Edit	Delete	Copy	Rename
P&L consolidating	PL Consolidating by Unit	2019 Final Budget	SS,M & S		Preview	Edit	Delete	Copy	Rename

You can also save changes to the report by using the **Update saved report with current selections** button.

You may save your report selections (or retrieve a previously saved selection):

Run one of my saved reports
Save current selections as new saved report
Update saved report with current selections

Saved report description: P&L consolidating

NOTE: Saved reports are on a user-by-user basis. You cannot save reports for other users to see.

## Thinking Differently - Unpublished

An eminent firm of publishers had a manuscript for a novel. It was written by a very well-known author and was sure to sell well. However, they chose not to publish it. Why? (This is a true story.)

[Give Up?](#)



---

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



Copyright © 2017. All Rights Reserved.