



The XLerant NewsPak - December 2019



You asked...we delivered

Our next release of BudgetPak will include these enhancements:

- **Advanced Reporting page redesign:** The advanced reporting page has been redesigned to provide better flow and significantly improved response time.
- **New Feature - Tags (replacement for cross-unit codes):** To provide more flexibility in reporting across units, tags have replaced cross-units codes. With up to 10 tag sets and with numerous tags in each, units can now have multiple tags. The new P&L Tag Consolidating report can be used to report on the different tag groupings.
- **Forecasting now has 3 start options:** A third option has been added to allow the budget holder to more precisely designate the initial state of a forecast when the annual totals should be updated.
- **Many more options when starting a budget or forecast:** The "Start multiple budgets/forecasts" function has a number of new options to allow you to precisely designate the Reviewed state of the different budget sections when it is started, as well as the ability to select account notes, line item details, ActionPaks, and Assets to pull through from prior version.
- **And more...**

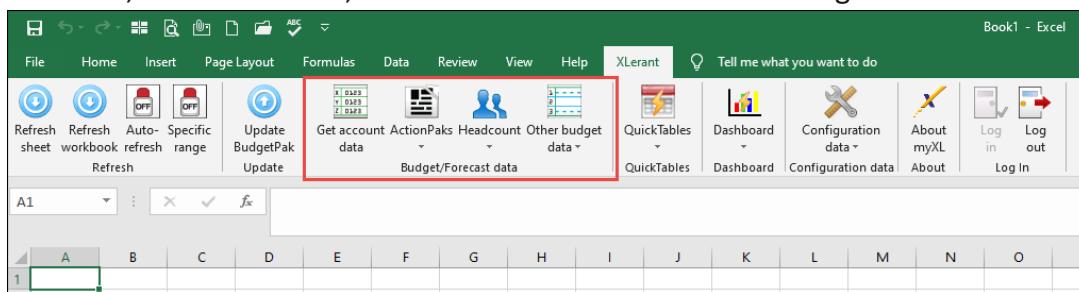
Did you know?

How do I pull budget data into Excel using myXL?

myXL is an Excel add-in that provides 3 distinct capabilities:

1. myXL ribbon functions allow you to interactively retrieve data from BudgetPak into Excel - such as account, headcount or configuration data.
2. myXL provides in-cell functions that mimic some of the interactive ribbon functionality, and also returns data on-the-fly. These functions are labeled "myXLGet...", and they allow you to refresh data in Excel with the latest changes that have been made within BudgetPak.
3. myXL allows you to write data into BudgetPak straight from Excel using in-cell formulas labeled as "myXLSet..." functions.

To pull budget data from BudgetPak into Excel, capability #1 (or myXL ribbon functions) would be used. The Budget/Forecast Toolbar is the place to go for functions that return information specific to individual versions, units, accounts, and ActionPaks, as well as headcount and other budget data.



- **Get account data:** This menu option returns account values and identifying information in a pivot-able format. Each row will contain information about a single account, for a single version, unit, ActionPak and month.
 - This is the function you will most likely use to get bulk data.
- **ActionPaks:** This menu option returns information about BudgetPak ActionPaks. You can see a list of ActionPaks, which accounts are mapped to which ActionPaks, and the values for each account in the ActionPaks.
- **Headcount:** The headcount menu contains information related to employees at your company.
 - The '**Get compensation changes**' function is used to retrieve data about compensation changes, such as raises, bonuses, terminations, and other compensation-changing events.
- **Other Budget Data:** This menu options contains functions that return specific budget information that isn't related to account data or headcount details. For example:
 - The '**Get account notes**' function returns all notes at the account level for the unit and versions selected.
 - The '**Get line item detail**' functions returns all accounts where the budget method 'by line item detail' was used.

It is important to note that once you have pulled data from BudgetPak through the myXL ribbon functions, that data in your Excel spreadsheet does not change automatically; it does not update on-the-fly as data inside BudgetPak changes.

For more information on how to use myXL ribbon functions, please see our [how-to video](#) or the [myXL Reference manual](#) for more detailed instructions.

XLerant Learning Series Webinars

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

Our latest webinar was on the topic:

Enhance your Budget - Features & Tips

[Watch it 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.

Thinking Differently - The Bookmark



A man who needs a bookmark is offered a fine bookmark for a dollar. Why does he refuse it?

[Give Up?](#)

Save the date...

3rd Annual Administrator Conference

Registration details will be coming soon.

April 20-22, 2020
Stamford, CT





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