



## The XLERANT NewsPak - January 2021

### Did you know?

*Did you know you can change the order that versions appear on the Versions page, and in drop down lists?*

The order versions appear on the main **Versions** page, as well as in drop down menus throughout BudgetPak, can be adjusted on the **Define Versions** configuration page:

The screenshot shows the BudgetPak Configuration page. The navigation bar includes Home, Dashboard, Versions, Status, Reports, Projections, Configuration, and About. The user is logged in as Jennifer. The main content area is divided into several sections:

- GENERAL ADMINISTRATION**
  - Administration
    - Validate and Initialize
    - Locks
    - Files
    - Categories
    - History & email notifications
    - Define surveys
    - Configure parsing
    - System note
  - Users
    - Users
    - User roles
    - Password policies
  - Reporting
    - Define P&L layouts
    - Configure P&L layouts
    - Report names
    - Reports & Quick Budget menu
    - Cross units
  - Dashboard
    - Configure dashboard
  - Currencies and foreign exchange
- DIMENSIONS**
  - Time
    - New fiscal year
    - Years
    - Quarters
    - Periods
  - Versions** (highlighted)
    - Define versions
    - F/X sets
    - Calculation defaults sets
    - Drivers defaults sets
    - Unit event defaults sets
    - Employee sets
    - Account defaults sets
  - Units & companies
    - Units
    - Companies
    - Unit event defaults sets
    - Configure unit event defaults
  - Accounts
    - Configure accounts
    - Configure stacks & sections
    - Map accounts to units
    - Map accounts to subtotals
    - Map accounts to sections
    - Map events to accounts
    - Configure allocations
  - Edit & export
    - Edit account data
    - Export account data
    - Edit prepap account data
    - Export prepap account data
- HEADCOUNT**
  - Headcount configuration
    - Edit employee data
    - Import/export employees
    - Employee sets
    - Configure salary grades
    - Configure employee classes
    - Map events to accounts
    - Unit event defaults sets
    - Configure unit event defaults
    - Configure headcount options
  - New hire policies
    - Define new hire policies
    - Configure new hire policies
  - Hourly employees
    - Edit hourly employee data
    - Define wage types
    - Define wage classes
  - Pay schedules
    - Define pay schedules
    - Configure pay schedules
  - Benefits by employee
    - Define benefit classes
    - Map benefits to accounts
    - Configure benefits library
    - Configure benefits selections
  - Tax authorities
    - National tax authorities
    - National empl. tax rates
    - State tax authorities
    - State empl. tax rates
- PARAMETERS**
  - Account defaults
    - Account defaults sets
    - Configure account defaults
  - Calculations
    - Define calculations
    - Calculation defaults sets
    - Configure calculation defaults
    - Configure allocations
  - Drivers
    - Define drivers
    - Driver defaults sets
    - Configure driver defaults
  - Assets
    - Configure asset classes
    - Configure asset library
    - Map asset classes to units
    - Map events to accounts
  - ActionPaks
    - Define shared ActionPaks
- IMPORT/EXPORT**
  - Account data
    - Import account data
    - Export account data
    - Import prepap data
    - Export prepap data
  - Other configuration
    - Import/export configuration data
    - Import/export employee data
  - G/L transaction detail
    - Review G/L import status
    - Import G/L transactions
    - Export G/L transactions
    - Manage G/L txn storage
    - Configure G/L transactions

Some functions may be listed in more than one place.

To adjust the sort order, use the grab bar located on the left side of the grid. When you hover over the grab bar a hand icon will appear. You can then drag and drop that row, or version, to the appropriate location.

## Define versions

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

Select the currently active fiscal year:

Define comparison versions: Comparison 1:  Comparison 2:  Comparison 3:

Show versions in fiscal year order  
 Show forecast columns

[Detailed forecast info](#) [Budget copy restrictions](#)

	edit	Edit (guide me through)	Fiscal year	F/X 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 L version
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-B-3	2019 Draft 1	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="button" value="Edit"/>	2019	R2019	FY2019-B-5	2019 Draft 2	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="button" value="Edit"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-B-6	2019 Final Budget	Budget	Jan	Dec	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2018 Forecast	2017 Actuals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-D-15	2019 Budget - Growth Plan	Budget	Jan	Dec	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2018 Forecast	2017 Actuals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-D-16	2019 Budget - Conservative Plan	Budget	Jan	Dec	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2018 Forecast	2017 Actuals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-F-9	2019 Q1 Forecast	Forecast	Jan	Dec	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2018 Forecast	2017 Actuals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-DF-24	2019 Q1 Detailed Forecast	Detailed forecast	Jan	Dec	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2018 Forecast	2017 Actuals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-PR&POP	2019 Prepop Data	Reference	Jan	Dec	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-R-10	2019 Actuals	Reference	Jan	Dec	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Make sure to keep the mouse within the grid-lines or else the version will not be moved. A dotted line will appear when moving the version successfully within the grid, as shown below.

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

Select the currently active fiscal year:

Define comparison versions: Comparison 1:  Comparison 2:  Comparison 3:

Show versions in fiscal year order  
 Show forecast columns

[Detailed forecast info](#) [Budget copy restrictions](#)

	edit	Edit (guide me through)	Fiscal year	F/X 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 L version
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-B-3	2019 Draft 1	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="button" value="Edit"/>	2019	R2019	FY2019-B-5	2019 Draft 2	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="button" value="Edit"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-B-6	2019 Final Budget	Budget	Jan	Dec	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2018 Forecast	2017 Actuals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-D-16	2019 Budget - Conservative Plan	Budget	Jan	Dec	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2018 Forecast	2017 Actuals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-F-9	2019 Q1 Forecast	Forecast	Jan	Dec	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2018 Forecast	2017 Actuals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>	2019	R2019	FY2019-DF-24	2019 Q1 Detailed Forecast	Detailed	Jan	Dec	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2018 Forecast	2017 Actuals

Validation and initialization are required after making this change.

## 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, February 25th

Topic: **Highlights from our Latest Release**

[Register Now!](#)

To watch recordings of 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).

## Thinking Differently - The Border Police



Hans and Fritz are German spies during World War II. They try to enter America, posing as returning tourists. Hans is immediately arrested. Why?

[Give up?](#)

