



The XLERANT NewsPak - April 2021

Did you know?

Did you know you can configure up to 3 additional informational fields for your employee data?

There are many options available under **Configure headcount options** on the Configuration menu. On the **Employee options** tab, there are three optional supplemental detail columns that can be used for headcount information. To use one, or all of these columns, simply enter a column description in the blank cell. If not in use, the cell(s) should remain blank.

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Configure headcount options

Company: ABC Organization

Est. budget impact Leave policy **Employee options** Review headcount notes

If you are using a non-calendar fiscal year or are using a detailed forecast, and you want to explicitly enter in the exact amount of taxable compensation each employee in your system has paid in that calendar year as of the start of the budget or of the active period of the forecast. If this box is not checked, BudgetPak will impute the YTD taxable compensation with the assumption that there were no raises, bonuses, leaves, or other compensation-affecting events in the preceding portion of the calendar year. This company uses explicit YTD taxable compensation

If you do not want your users to be able to edit their starting headcount using the 'Headcount review' section, then check this box. Otherwise, any users with the ability to view headcount will be able to create and edit their starting employee set. Disable headcount editing capabilities in the headcount review section

If you have employees who receive their full annual salary within a reduced portion of the year (such as a professor who gets paid their full annual salary over the course of ten months), check this. Otherwise, leave it unchecked. This company uses Personal Pay Years

If you have users who are not allowed to see headcount sections, and specifically should be allowed to sign off budgets while those sections are not reviewed, check this box. Otherwise, leave it unchecked. Checking this box means that your budgetholders can sign off on a budget that they have not entirely seen. If their budget was started from scratch, raises and bonuses may not have been created when the budget is signed off. Allow signoff without headcount review?

If you have users who are not allowed to see restricted sections, and specifically should be allowed to sign off budgets while those sections are not reviewed, check this box. Otherwise, leave it unchecked. Checking this box means that your budgetholders can sign off on a budget that they have not entirely seen. Allow signoff without reviewing restricted sections?

If you would like to use the optional supplemental detail columns for headcount information, please enter the names of the columns here. If you are not using a column, leave the name blank.

First optional column name:

Second optional column name:

Third optional column name:

When importing employee data, include the column description entered on the Configure headcount options page in your import template, and the information from that column will import into BudgetPak. The information is also present when exporting employee data via Configuration and when using myXL.

EmployeeID	LastName	FirstName	Title	EmployeeClass	Position Number
122276	Whitestag	Rita	Administrative Assistant	Part Time	A00541
146452	Libor	Phil	Supervisor	Full Time	A00541
161074	Smith	Ann	Supervisor	Full Time	A00541
110047	Green	Charles	Administrative Assistant	Part Time	A00541
194891	Franklin	Betty	Supervisor	Full Time	A00541
146474	First	Steven	Admissions Manager	Full Time	A00541
1106741	Position	Open	Administrative Assistant	Full Time	A00541
1106742	Position	Open	Administrative Assistant	Full Time	A00541
194937	Tampa	Robert	Sr. Supervisor	Full Time	A00622
205741	Rice	William	Administrative Assistant	Full Time	A00622
133115	Scopes	Anna	Sr. Professor	Faculty	F02452
187040	White	Steven	Professor	Faculty	F02452
214377	Zank	Rita	Sr. Professor	Faculty	F02452

The optional fields can also be seen and updated on the **Edit employee data** configuration page.

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Review/edit employee data

Select the company and fiscal year for the companies you would like to review or edit.

Employee set: EE2021: Employee set for 2021
Company: Stamford University: Stamford Unj No. of employees: 198

Configuration options Discard Close Save Add

Populate set from prior version Delete all employees
Clean up invalid mappings Hide last raise/bonus information

NOTE: Enter currency amounts in the local currency for each unit.

Map	Alloc	Edit	ID	Last	First	FTE	Title	Position Number	Position Description	Position Opened	Unit
			317063	Gilbert	Angela	100.00	Electrician	U00748	Union	6/1/2015	20-100-01: Marketing
			326049	Hindle	Ernesto	100.00	Plumber	U00748	Union	6/1/2015	20-100-01: Marketing
			216555	Knudsen	Ethan	100.00	Plumber	U00748	Union	6/1/2015	20-100-01: Marketing

The information appears for Budget Holders in the **Headcount Review** section of the budget navigation map.

Headcount review

Please review your current headcount and answer the questions step by step. You can always come back later and change your answers.

Step 1
Review your current headcount below. Is the list complete and correct?
 Yes Even if you are not sure all the details are correct, you may proceed with budgeting and come back here later to verify.
 No
 Note: Please consider at this point ONLY your CURRENT headcount. We will ask about new hires later.

Step 2
Are any of your current headcount going to be leaving permanently, for any reason?
 Yes Designate the departure date(s) below.
 No All terminations must be reviewed with Human Resources

Step 3
Are any of your current headcount going on leave of absence?
 Yes
 No

Current employees
Current employees as of 6/30/2020: Filter Recalc

Employee class	Employee ID	Name	Headcount / FTE	Allocation	Net headcount	Title	Position Number	Position Description	Position Opened
Faculty	214410	Parson, Stanley	1.400	100 %	1.400	Professor	F02452	Faculty	8/1/2015
Faculty	106732	Position, Open	1.000	100 %	1.000	Professor	F02452	Faculty	8/1/2015
Faculty	133115	Scopes, Anna	1.000	100 %	1.000	Sr. Professor	F02452	Faculty	8/1/2015
Faculty	187040	White, Steven	1.000	100 %	1.000	Professor	F02452	Faculty	8/1/2015

When adding a New Hire, Budget Holders will be able to enter information into the fields if in use.

Edit new hire details

Please answer the stepwise questions to designate the details for your prospective new hire. (You can always come back later and change the details.)

Impact on budget:

Est. impact of salary and start date:	\$33,151
Impact of new hire policies:	\$12,500
Total est. budget impact:	\$45,651

Recalc

How will this new hire be paid? Paid by salary Paid hourly

What type of new hire is this? New

Optional: If you already know the new hire's name, you may enter it here (last name, first name).
 New Hire:
 Employee ID:

Salary and start date
New hire policies
Tax authorities
Optional information
Mapping
Benefits
Allocation

Step 6: Optional Information

This is a full-time employee
 If not, enter the full-time equivalent (FTE):

Title:

Employee class: Faculty
The pay schedule for this employee class is 'Faculty Pay Schedule'.

Position Number:

Position Description:

Position Opened:

Employee note:
If you'd like to add a note about why this hire is necessary, or some other note, you may do so here.
0 characters of 1024 maximum

Save
Cancel
You have unsaved changes!

To see other options available under Configure headcount options, click [here](#).

XLerant Learning Series Webinars

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

Our latest Learning Series Webinar was on the Topic:
Getting More Out of BudgetPak's Report Capabilities
[Watch it 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.



Thinking Differently - Candy in Pocket

Because he had a piece of candy in his pocket, a man invented something which is found in most modern kitchens. What is it?

[Give up?](#)