

Global Budget Changes

Last Modified on 05/24/2023 2:07 pm EDT

This is a high-level menu option to copy or calculate budgets for a range of G/L accounts. In any of the following options, the budget year affected by the copy must be open to allow entry for this process.

Step-by-step instructions for each option are listed below under Walkthroughs.

COPY

Allows you to copy a selected budget column for a year into another budget column. For example: copy this year's budget into a column for this year's forecast. Or copy this year's budget into a new column for a pro forma budget. You may select to copy any type of budget column (budget, forecast, etc.). This can be used to copy from one year to another or one account to another. You may also select a range of months to copy "from" and/or "to". The Accounts button allows you to select the accounts to copy "from" and "to". It is important to use this filter, as the default is set to all accounts. By default the "to" accounts are set to (Same), meaning they will copy to the same account as the account being copied "from".

- If you are copying budget or forecast you have the option to copy components or not.
- Be aware that if you copy actual figures into a budget or forecast, any existing components in the resulting account/s will be deleted, as actuals do not have components. It is normally not recommended to copy actual figures into a forecast; the Actual/Forecast column on screen displays or financial reports represents the Actuals through the month selected and Forecast for the remainder of the year.

A checkbox controls if the allocations are to be re-computed in the resulting "to" account.

COPY ONE ACCOUNT TO MULTIPLE

Copies a budget column for one selected account into another budget column for one or more accounts. This can be useful if you wish to default the components (especially descriptions) from one account that you already have set up to other accounts. In this case you would enter all the component details in one account that are appropriate for copying (probably descriptions without amounts). Then use this tool to copy that one account's budget to a selected range of accounts. For example, enter rows for all the available classes in a program in each month; then copy the descriptions in that account to other similar accounts. This assures that all these accounts have the same descriptions for users to begin budget entry and can later be used in a report to summarize component details by description for the organization.

CLEAR

Clears all months of budgets and components for a selected budget column for selected accounts. Use with caution as a clear/delete cannot be undone! This allows testing/playing in a new budget column while formats are being established and tested. Run the clear when ready to begin real/live budgeting for that budget column.

CLEAR COMPONENTS

Clears all components for the selected accounts in the selected budget column. This would leave the monthly budget amounts as is but clear the component details. This tool is mostly used when components exist for budgeting; but your organization does not want to use components for forecasting. Clear the components and the monthly budget amounts can then be changed on the Budget/Actuals screen.

GLOBAL BUDGET FORMULAS

This allows a formula calculation for selected accounts. These same formulas are available on an individual account in the Actuals/Budget screen.

An example of using a global budget formula calculation as a starting point when setting up the budget: If you want to budget a percent increase over last year for a group of utility accounts, you can use the Global Budget Changes tool and calculate an x percent increase from a prior year, updating the new year budget. The calculation is complete as soon as you click the OK button. You might then go to Settings > Budgeting > Years and lock down that range of accounts in the new budget year. This saves time or errors with any manual calculation by budget directors.

Percent change: See budget formulas for the calculation. Any existing budgets and components will be cleared and the monthly budget amounts updated on each account.

Average percent change: See budget formulas. Any existing budgets and components will be cleared and the monthly budget amounts updated on each account.

Trend based on past years: See budget formulas. Any existing budgets and components will be cleared and the monthly budget amounts updated on each account.

For more details on formula calculations see [budget formulas](#).

Spread evenly based on annual: Spreads all 12 months evenly based on the existing annual budget amount on each account. If Settings > Budgeting > Budget Options is set to round budgets, the figures will be rounded.

Edit comments: Changes the budget comments for the budget year on selected accounts to whatever is specified, even if it is to blank out the comments.

Account Selection

Click the Accounts button to designate the account ranges being changed. Accounts will be restricted to the [account restrictions for the user](#) as well as any account restrictions set under the [budget year](#).

Compute auto-computed allocations

If this box is checked, all allocations will be computed for all accounts that are marked as auto-compute. Typically you want to leave this checked. If computing allocations takes a while and you are doing multiple global changes you may want to uncheck it and then compute the allocations during the last global change or afterward under [allocations](#).

Components

When running one of the formulas, such as percent change, components will not be created. If budget figures already exist with components for the year being calculated then the first line of the month will have the total for the month and the remaining lines will be set to zero.

Walkthroughs

Percent change

The following are instructions on how to create budgets for next year for a certain range of accounts/objects based on a percentage increase from the prior year.

1. Select "Percent change" as the action.
2. You will then be prompted for the percentage increase, the year to base the calculation on, and whether to calculate based on budget or actual figures for that year. Enter the percent with whole numbers. For example, enter 2 for two percent; enter 2.5 for two and one half percent, etc.
3. Click the accounts button to enter the range of accounts for the budget year you are creating.

Copy from budget to forecast

1. Select "Copy" as the action.
2. Choose the accounts you want to copy by clicking the Accounts button.
3. Leave the "To Accounts" alone.
4. Select this year budget for the From and this year forecast for the To.
5. Optional checkbox to auto-compute the new forecast allocations. To save time in the Copy process, you may elect to not auto-compute the allocations at this time and later go to Settings > Budgeting > Allocations and manually compute the allocations.

Copy budget from one department to another

1. Select "Copy" as the action.
2. Choose the accounts you want to copy from by clicking the Accounts button.
3. Choose the accounts you want to copy to by clicking the To Accounts button.
4. Select the budget you wish to copy From and To.
5. Optional checkbox to auto-compute the allocations, if appropriate to this group of accounts.
6. Note: The budget in the "from" account will be copied to the "to" account, overlaying anything in budget in the "to" account. Components will also be copied, if the box to copy components is checked on the Global Budget copy screen.

Copy one account to multiple.

This is helpful if you add the budget component detail in one account and you then wish to copy this budget component detail to one or more other accounts.

1. Select "Copy one account to multiple" as the action.
2. Choose the single account you want to copy from.
3. Choose the accounts you want to copy to by clicking the To Accounts button.
4. Select the budget you wish to copy From and To.
5. Optional checkbox to auto-compute the allocations, if appropriate to this group of accounts.

