

Budget Years

Last Modified on 04/22/2025 5:26 pm EDT

Budget Years

[Settings](#) > [Budgeting](#) > [Years](#)

Video Tutorial

Click the play button below for a video tutorial. This tutorial is about 11 minutes long. Written instructions are below the video.

NOTE: *If viewing from the right-side screen, to open the video on a larger screen, use the "Open in full site" link at the bottom left of the help display. If you are already viewing from the full site, click the play button below to begin the tutorial.*

Your browser does not support HTML5 video.

Step-by-Step Instructions

This is where yearly budgets are defined according to their [budget types](#). When you are ready to begin budgeting for a new year, you must first come here to create the year for the type of budget. Later in the year, when you are ready to start forecasting, you will come here again and create a forecast for the year.

Adding New Budget Years

Click **New** to open a new budget year. Enter the year, and choose a type from the drop-down.

Disallow entry on specific dates: If the budget type you are working with is **Forecast**, you might want to set dates through which forecast changes can be made for each month. You can do that by clicking the **Dates** button and specifying each one. The dates entered are those on which entry will not be allowed in the future.

Note: *if annual budget formats are being used, do not set to disallow entry on specific dates. An annual budget format requires annual entry allowed on all dates so the annual budget amount can be appropriately distributed over the various months.*

Allow entry: When checked, this allows budget entry for the year. You can also restrict entry to only specific accounts or users. To do that, click the **account restrictions** or **user restrictions** button and specify the restrictions. To enable entry for all accounts, users leave them blank. If a user is included in one or more groups, the highest level of permission (user vs group) will take precedence. Therefore, if you remove permission at a user level and this user's group still has permission, the user will still have permission through the group setting.

Allow change to annual amount: When checked, this allows the total amount of the annual budget to change for the year. If unchecked, you can only change the budget's monthly

distribution, which must total the annual amount. If your budget formats are set for annual rather than monthly budgeting, you cannot change the components on the annual tab.

Important: When *"Allow change to annual amount" is unchecked*, any budget allocations with auto-compute checked will still be updated, which could change the annual budget by a few dollars. This is because budget allocations are computed for each month and could change the annual budget. This box must be checked to allow global budget changes for the year (using the menu option *Budgets > Global Budget Changes*).

Lockdown attachments when not enabled for entry: When checked, and entry for the budget year has been disallowed, all account budget year attachments are treated as read-only. Attachments may be viewed and/or downloaded, but no new attachments may be added, and existing attachments may not be deleted.

Locking Budgets

Lockdown budget entry for selected accounts: If you wish to restrict accounts, budgets can be entered. Click the Account Restrictions button and choose the accounts with allowed budget entry. If nothing is selected, entry is permitted for all accounts.

Lockdown budget entry for selected users: To restrict budget entry to selected users, click the User Restrictions button and select the users allowed to make budget entries. If no users are specified, all users can access budget entries if their menu permissions allow it.

Note: When changes are made to *Settings > Budgeting > Years*, the user must log out and back into SGA Accounting before they see the changes refreshed.

[Budget Setup for New Year.](#)
