

Budget Years

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

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 the dates that entry will not be allowed on or 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 to 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 restriction button and specify the restrictions. To enable entry for all accounts and users leave them blank. If a user is included in one or more groups, the highest level of permission (user vs group) will take precedent. 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 annual budget total amount to change for the year. If this is unchecked then you will only be able to change the monthly distribution of the budget. Therefore, the monthly distribution must total the annual. If you have budget formats that are set for annual as opposed to monthly budgeting then you will not be able to change the components on the annual tab.

It's important to note that when this 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 due to the fact that 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 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.

How to lock down budgets

Lock down budget entry for selected accounts: If you wish to restrict accounts budgets can be entered into, click the Account Restrictions button and select the accounts budget entry is allowed. If nothing is selected, entry is allowed for all accounts.

Lock down budget entry for selected users: If you wish to restrict budget entry to selected users, click the User Restrictions button and select the users allowed to do budget entry. If no users are specified, all users have access to budget entry, if their menu permissions allow.

Note: anytime changes are made to Settings > Budgeting > Years, the user will have to log out/back into SGA Accounting before they see the changes refreshed.

Budget Setup for New Year.
