Last Modified on 04/23/2025 8:50 am EDT

Global Budget Changes
Budgets > Global Budget Changes

Video Tutorial

Click the play button below for a video tutorial. This tutorial is about 15 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 a high-level menu option for copying or calculating budgets for various G/L accounts. The budget year affected by the copy must be open in any of the following options to allow 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 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 lets you choose the accounts to copy **from** and **to**. It is essential 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 from which they are copied.

- If you are copying a budget or forecast, you can copy components or not.

- 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 typically not recommended to copy actual figures into a forecast; the Actual/Forecast column on-screen displays or financial reports represent the Actuals for the month selected and the 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 and converts it into another for one or more accounts. This can be useful if you wish to default the components (especially descriptions) from one account you already have set up to another. 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 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

This 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 column.

Clear Components

This tool clears all components for the selected accounts in the budget column. It leaves the monthly budget amounts as is but clears the component details. This tool is mainly used when components exist for budgeting, but your organization does not want to use them for forecasting. After clearing the components, the monthly budget amounts can be changed on the Budget/Actuals screen.

Global Budget Formulas

This allows formula calculations for selected accounts. The exact formulas for individual accounts are available 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 will be updated on each account.

Average percent change: See budget formulas. Any existing budgets and components will be cleared, and the monthly budget amounts will be 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 will be 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 each account's existing annual budget amount. If *Settings > Budgeting > Budget Options* is set to round budgets, the figures will be rounded.

Edit comments: This option allows you to change 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 user's account restrictions and 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 marked as auto-compute. Typically, you want to leave this checked. Suppose computing allocations takes a while, and you are doing multiple global changes. In that case, you may want to uncheck it and then compute the allocations during the last global change or afterward under allocations.

Components

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

Walkthroughs

Percent change:

The following are instructions on creating budgets for next year for a specific 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 on which to base the calculation, and whether to calculate based on budget or actual figures for that year. Enter the percent in whole numbers. For example, enter 2 for two percent, 2.5 for two and one-half percent, etc.

3. Select the column from the dropdown that you want the percent change to apply. For example, Actuals, Actual/Forecast, Budget, etc.

4. 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. **Copy into different months:** Check this box if you want to copy data into specific months of the calendar or fiscal year rather than across the entire year.

5. Select this year's budget for the From and this year's forecast for the To.

6. Optional checkbox to auto-compute the new forecast allocations. To save time in the Copy process, you may elect not to auto-compute the allocations at this time. 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. **Copy into different months:** Check this box if you want to copy data into specific months of the calendar or fiscal year rather than across the entire year.

5. Select the budget you wish to copy From and To.

6. Optional checkbox to auto-compute the allocations, if appropriate to this group of accounts.

Note: The budget in the *from* account will be copied to the *to* account, overlaying anything in the 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 to one account and then wish to copy it 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. **Copy into different months:** Check this box if you want to copy data into specific months of the calendar or fiscal year rather than across the entire year.

5. Select the budget you wish to copy From and To.

6. Optional checkbox to auto-compute the allocations, if appropriate to this group of accounts.