

How to extend the Fiscal Period for a Ledger in Alma?

Question

How can the a Fund from a previous Fiscal Period be used for an encumbrance or expenditure? How to "extend" and enable Alma to find the Fund from the POL or Invoice?

Answer

1. Edit the Ledger or the Fund.
2. In the 'Summary' tab, scroll down to the bottom of the page and expand the '**Rules**' section.
3. Indicate the number of days by which to extend the Fiscal Period by adding a value to the '**Fiscal period end encumbrance grace period (days)**' (will impact POLines) and '**Fiscal period end expenditure grace period (days)**' (will impact invoices).
4. The Ledger and Fund need to be **Active**.
5. The Fiscal Year should be **active** as well (from: Configuration > Acquisitions > Fund and Ledger Fiscal Period).

Restore the values, later on.

Additional Information

Find more in the documentation about "[Managing Funds and Ledgers](#)".

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