

Create new fiscal year - without rolling funds over

- **Product:** Alma
 - **Product Version:** May 2016
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How to:

Desired Outcome Goal:

If the fund structure is changed between years (and not being rolled over) - a new fiscal year needs to be created, which the new funds can go against. In order for the new period to be in the fund drop-down it needs to appear in the 'Fund and Ledger Fiscal Period' table – but this table does not allow adding rows manually

Procedure:

In order to add the new fiscal year to the 'Fund and Ledger Fiscal Period' table:

1. Go to Acquisitions Menu > Rollover Ledgers and add a job
2. Choose one random ledger and make sure to set it as :
 - a. No allocation
 - b. Action = Copy
 - c. Draft status
3. After the job is completed, go to the Fund and Ledgers page – identify the new draft ledger – and delete it (saying yes to delete all its related funds etc.)
4. Now if you go back to the Fiscal Period mapping table you will have a new entry that will also be visible when adding new funds/ledgers

Note we are not running a rollover on all ledgers – just one in order to get our missing line into the mapping table.

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