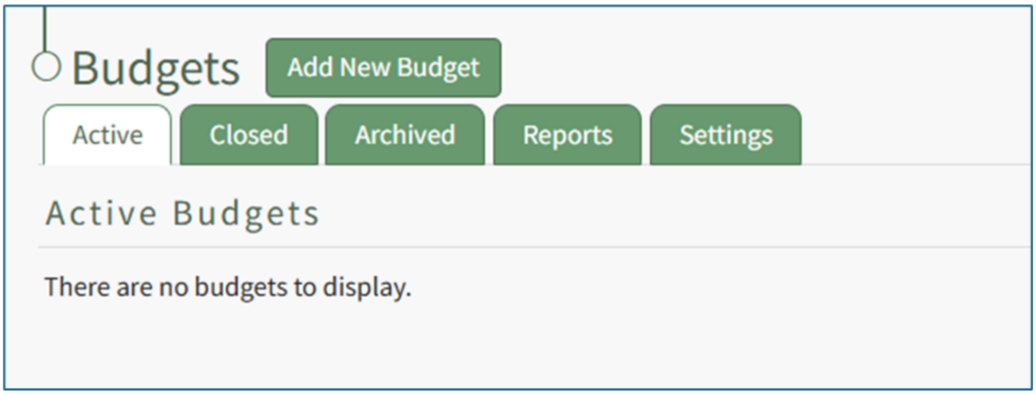
Budgets Page: Active / Closed / Archived Tabs

The Budgets Page of the Finance Module is comprised of five tabs: Active, Closed, Archived, Reports, and Settings. The active tab you're on is designated by the white coloration.

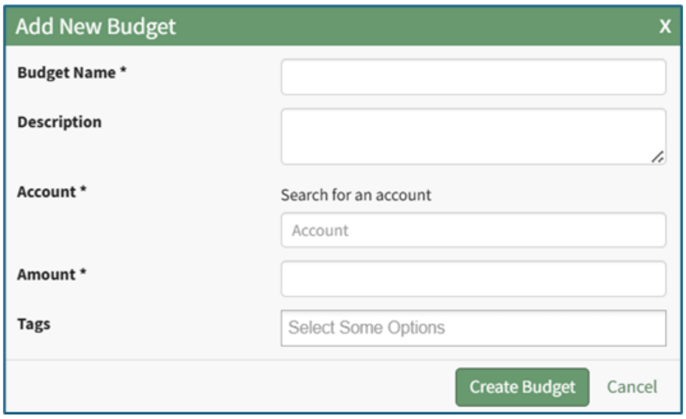
The "Add New Budget" button will show to the right of the budget header, regardless of which tab is open.

How To: Add a New Budget

To create a new budget within the Finance Module, go to any tab on the Budgets Page and select the "Add New Budget" button.



This opens the Add New Budget Modal.



Input the budget name and a description.

Identify the individual to be listed as the account. Account refers to the individual whose account is linked to the budget as an owner.

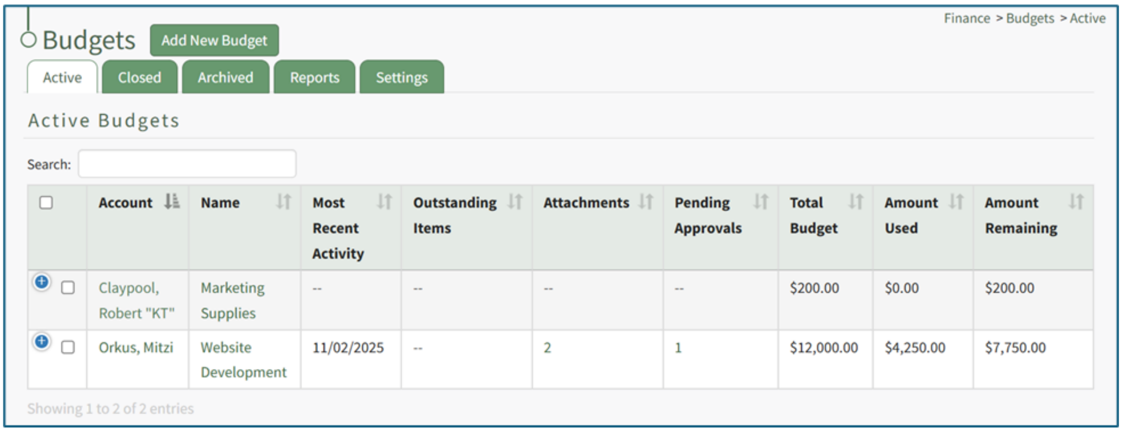
> You can only select one individual.

Include the budget amount.

Select any tags for categorization or security purposes.

> If an individual is not associated with a budget as the account holder or an approver, they cannot be given visibility.

Click the “Create Budget” button and the newly created budget will show in the Active Budgets Table on the Active Tab of the Budgets Page.



All budgets are grouped as active, closed or archived, and are shown in budget tables on the different tabs. A budget is only visible to account users if they are listed as the account holder of the budget or if they are listed as an approver on the budget.

> If an individual is not associated with a budget as the account holder or an approver, they cannot be given visibility.

An explanation of the budget table can be found under the Understanding Budgets and Budget Items of the User Manual.

To open a budget (regardless of its status), you can click directly on the budget name or click the eyeball icon in the action column of the table.

The actions available in the budget table vary by tab.

Actions Available in the Budget Table Based on Status	
Tab	**Actions Available**
Active	View Budget, Edit Budget, Add Budget Alert, Edit Approvers / Notifications, Close Budget, and Archive Budget

Closed	View Budget, Make Budget Active, Archive Budget
Archived	Make Budget Active, Delete Budget

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