Manage Fiscal Years

Defining fiscal years will let you create reports that aggregate results by year where the year might start on an arbitrary day, like October 1st. Every reporting cycle is associated with one fiscal year.

Most programs operate with one fiscal year and this gets set up when your site is built. If you have permission to edit program settings, you can add fiscal years or change your fiscal year.

To do so, go to **Administration > Program Settings**:
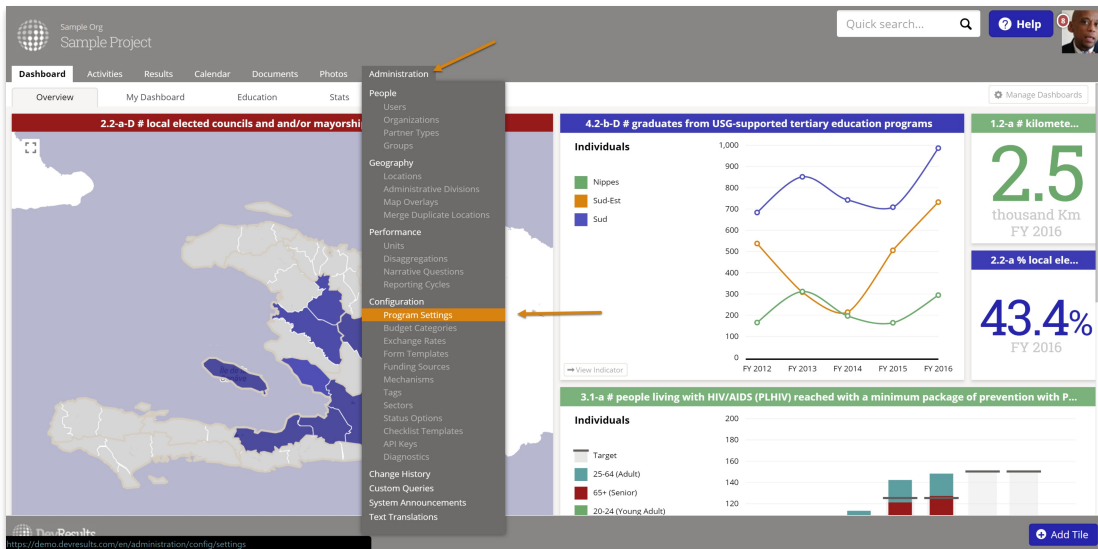
Scroll down to the bottom left of the page. Under **Fiscal Years**, click **(+) Add Fiscal Year** in blue.
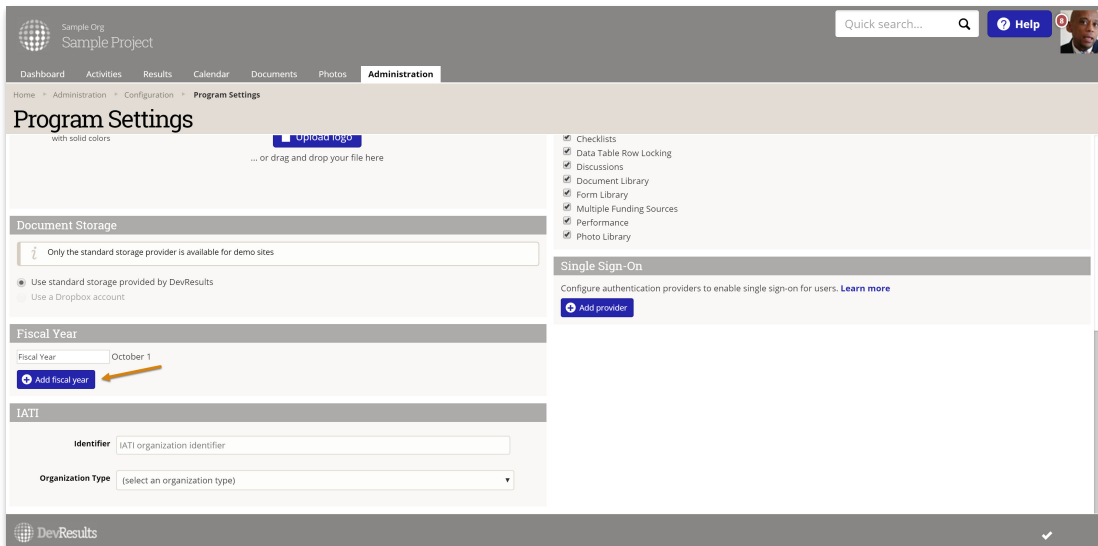
Give it a descriptive name, like "Calendar Year" or "Donor Fiscal Year" and define a start date. Click **OK** once you've finished editing your fiscal year.

Dashboard   Activities   Results   Calendar   Documents   Photos   **Administration**

Home ▸ Administration ▸ Configuration ▸ **Program Settings**

Program Settings

with solid colors

📄 Upload logo

... or drag and drop your file here

Document Storage

ℹ Only the standard storage provider is available for demo sites

● Use standard storage provided by DevResults
○ Use a Dropbox account

Fiscal Year

| Fiscal Year | October 1 |

| Calendar Year | Starts | January ▼ | 1 | ✔ OK ⊘ Cancel |

IATI

Identifier   [IATI organization identifier]

Organization Type   [(select an organization type)   ▼]

If you need to remove a fiscal year, click "Delete" next to the fiscal year. To change your fiscal year, delete it and add the new one.

Fiscal Year

| Calendar Year | January 1 |
| Fiscal Year | October 1 ✖ Delete |

➕ **Add fiscal year**

Remove "Fiscal Year"

Related Articles