Protecting Prior Month Information

Not everyone may know that the GMS Accounting software has a way to prevent the editing, creating or deleting of any transaction for a prior period. Once a month has been “closed” and the financial reports reviewed and/or approved, you may want to prevent any type of changes to this data, especially if it has been used to generate external reports to a funding source.

Under Tools/User Set Up, you will see a tab called Month End Period. If you are the one that made the decision that a particular month end was final and no changes should be made, make sure you click on your user name. On that form is a Posting Period combo box. If you set the Posting Period at 06/30/19 for example, that will prevent anyone from creating, editing or deleting any batch with a posting period of 06/30/19 or earlier.

GMS strongly suggests that access to change this date be limited to just one person, or very few individuals. That way if you are the only employee with access to this form, no one can make any changes to the prior period information without first coming to you to set this date to an earlier period.