



Copy Finance Tables to Budget - BUD7000

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Budget > Utilities > Clear/Copy Budget Tables > Clear/Copy Finance Tables to Budget

This tab is used to copy current year finance tables to Budget.

Copy finance tables:

All available finance tables are displayed on the left side of the page. Select the tables to be copied and use the following buttons to move the selected tables to the right side of the page.



- Click to move selected entries from the left side to the right side of the page.



- Click to move all entries from the left side to the right side of the page.









- Click to move selected entries from the right side to the left side of the page.



- Click to move all entries from the right side to the left side of the page.

Field	Description
Preview Data	<p>Select to view the data records being copied to the budget tables.</p> <p>If selected, a preview report of each current year table being copied to the next year is displayed.</p> <p>If not selected, a message is displayed indicating that the tables were successfully copied.</p>

Button	Description
Execute	<p>Click to execute the process.</p> <ul style="list-style-type: none"> • Click Yes to perform a system backup. Otherwise, click No to continue the process. <ul style="list-style-type: none"> ◦ The File ID field is display only and reflects the file ID to which the user is logged on. • The Export File Name field is display only. <ul style="list-style-type: none"> ◦ Click Execute to continue the export. Otherwise, click Cancel to close the page without completing the task. • Type a password for the exported file, and then click Execute. The File Download page is displayed. • Click Save to save the file. A Save As dialog box is displayed. <ul style="list-style-type: none"> ◦ In the Save in field, navigate to the appropriate folder. ◦ In the File name field, the file name is set to dbccddd_mmddyyyy_bud.rsf, where cccddd is the county-district number and mmddyyyy is the current date. You can type a different name for the file. • Click Save. Otherwise, click Cancel to close the Save As dialog box without saving the file.

Button	Description
Process	<p>Click to copy the finance table data to Budget.</p> <p>A message is displayed prompting you to create a backup.</p> <ul style="list-style-type: none"> • Click Yes to continue the process and create a backup. A message is displayed with the export file name. <ul style="list-style-type: none"> ◦ Click Execute to continue processing the backup. A message is displayed prompting you for an archive password. <ul style="list-style-type: none"> ◦ Type a password and click OK. Otherwise, click Cancel. <ul style="list-style-type: none"> ◦ <p>A message is displayed indicating that the process was complete. Click OK.</p> <ul style="list-style-type: none"> • Click No to continue the process without creating a backup. <p>If Preview Data is selected, the Data Preview - Fund (Function, Object, Subobject, Org, or Program) Code Table report is displayed with the account code information that was copied for each account code element. Each element code table must be reviewed, and processed or canceled to display the next element code table.</p> <p>Review the report.</p> <p>Review the report using the following buttons:</p> <p>Click  to go to the first page of the report.</p> <p>Click  to go back one page.</p> <p>Click  to go forward one page.</p> <p>Click  to go to the last page of the report.</p> <p>The report can be viewed and saved in various file formats.</p> <p>Click  to save and print the report in PDF format.</p> <p>Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.</p> <p>Click X to close the report window. Some reports may have a Close Report, Exit, or Cancel button instead.</p> <ul style="list-style-type: none"> • Click Process to continue. • Click Cancel to cancel and return to the Copy Finance Tables to Budget tab. • <p>A message is displayed indicating the process was completed. Click OK.</p>