

Copy Finance Tables to Budget - BUD7000

Table of Contents

Copy Finance Tables to Budget - BUD7000 i
Copy Finance Tables to Budget - BUD7000 1

Copy Finance Tables to Budget - BUD7000

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	Select to view the data records being copied to the budget tables. If selected, a preview report of each current year table being copied to the next year is displayed. If not selected, a message is displayed indicating that the tables were successfully copied.

Execute	Click to execute the process. • Click **Yes** to perform a system backup. Otherwise, click **No** to continue the process. ◦ 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. ◦ 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. ◦ In the **Save in** field, navigate to the appropriate folder. ◦ In the **File name** field, the file name is set to dbcccddd_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.

Process	Click to copy the finance table data to Budget. A message is displayed prompting you to create a backup. • Click **Yes** to continue the process and create a backup. A message is displayed with the export file name. ◦ Click **Execute** to continue processing the backup. A message is displayed prompting you for an archive password. ◦ Type a password and click **OK**. Otherwise, click **Cancel**. ◦ A message is displayed indicating that the process was complete. Click **OK**. • Click **No** to continue the process without creating a backup. 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. Review the report. **Review the report using the following buttons**: Click First to go to the first page of the report. Click ◂ to go back one page. Click ▸ to go forward one page. Click Last to go to the last page of the report. **The report can be viewed and saved in various file formats**. Click to save and print the report in PDF format. 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. Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead. • Click **Process** to continue. • Click **Cancel** to cancel and return to the Copy Finance Tables to Budget tab. • A message is displayed indicating the process was completed. Click **OK**.