



## **Copy Current File ID to New File ID**



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Log on to file ID C.

[Finance > Utilities > Move Current to New File ID](#)

Create the new historical file ID. At this point, **All** fund/ysrs should be selected to be copied or moved.

It is recommended that you copy rather than move all fund/ysrs to the new historical file ID. This is a precautionary measure in case an error occurs and you need to delete the funds from the historical file ID and run the process again.

In this example, all fund/ysrs are copied to the new historical file ID 8; however, you can use a different file ID.

SCREENSHOT

In the **New File ID** field, select the file ID to which you want to copy funds. The file ID can be alpha or numeric.

Select the funds to be copied.

Select **Copy** to copy all funds to the new historical file ID.

Click **Execute**. If there are errors, an error report is displayed. Review the errors, and then click **Cancel** to correct the errors and repeat the steps.

SCREENSHOT

Click **Process** to continue. You are prompted to create a [backup](#). A message is displayed indicating that the process was successfully completed.

SCREENSHOT

Click **OK** to close the message box.

Run the [Finance > Reports > Finance Reports > Summary/Miscellaneous Reports > FIN3050 - Board Reports](#) to compare fund totals in file ID C and the new historical file ID.