



Review file IDs

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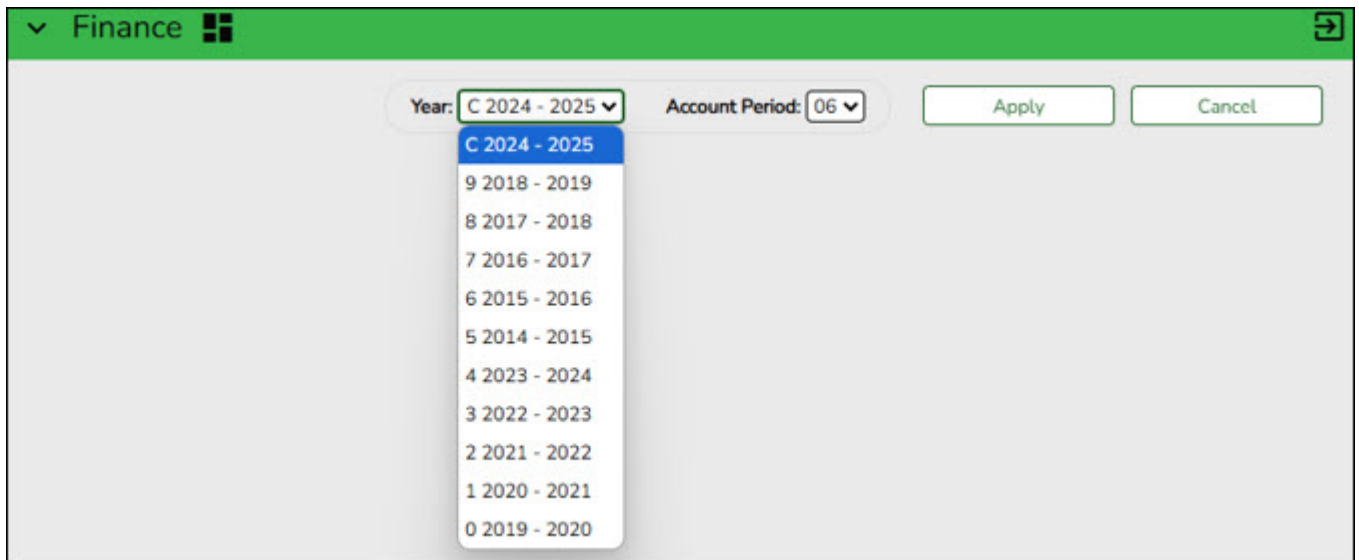
Review file IDs

Prior to creating the new historical file ID, review the existing file IDs to determine if any need to be deleted or copied to a new file ID.

Note: Keep in mind that all existing historical file IDs are subject to open records requests.



TIP: It is recommended to only keep the numerical file IDs. This makes it easier for LEAs to use the fiscal year when defining the **Next Available** numbers on the Finance > Tables > District Finance Options > Finance Options tab.

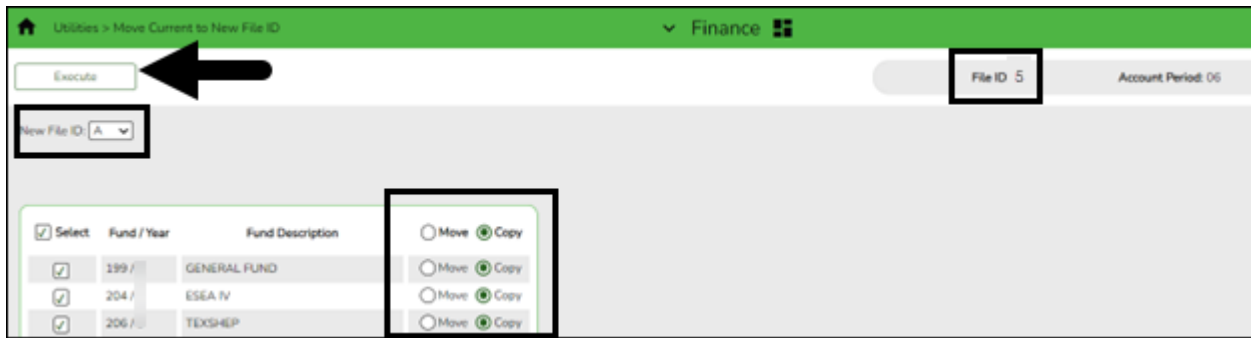


If file ID 5 (2014-2015) exists and you want to retain it for historical purposes, log on to file ID 5 and copy it to a new unused alpha file ID using the [Finance > Utilities > Move Current to New File ID](#) page.

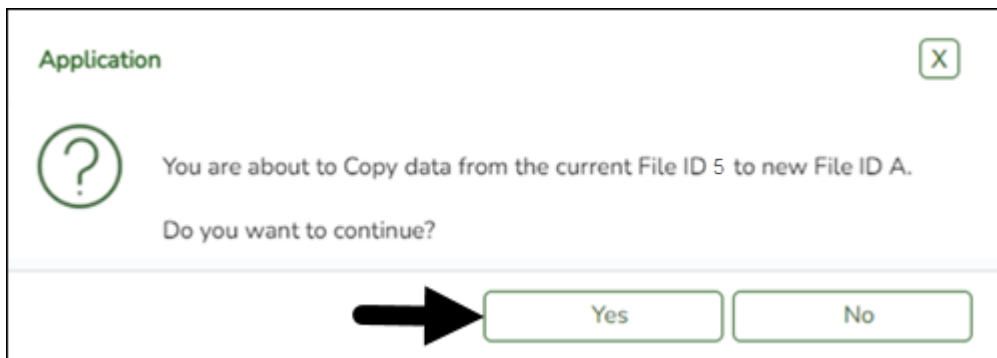
If you do not need to copy to a new file ID, proceed to Step 11.



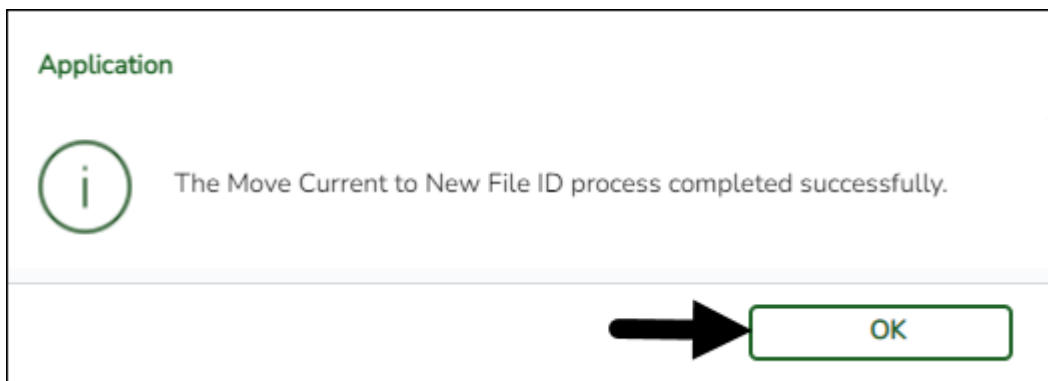
Log on to the applicable historical file ID as this utility cannot be processed in the current file ID (file ID C).



- In the **New File ID** field, select the file ID to which you want to copy all funds.
- It is recommended** to copy all funds. Click the **Select** checkbox in the column heading to select all funds.
- Click **Copy** in the column heading to select **Copy** for all funds.
- Click **Execute**. A message is displayed indicating that data is about to be copied from one file ID to another.



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



- Click **OK** to close the message box.
- Log on to the historical file ID to verify that the copy was successful.

Proceed to the next step to delete file ID 5 (2014-2015). Deleting file ID 5 (2014-2015) allows the 2024-2025 fiscal year data to be saved in file ID 5.