



Review file IDs

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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.

If you do not need to delete or copy any file IDs, continue to step 10.

If file ID 1 (2010-2011) exists and you want to retain it for historical purposes, log on to file ID 1 and copy it to a new unused alpha file ID using the [Finance > Utilities > Move Current to New File ID](#) page. 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** check box 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](#). 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 1 (2010-2011). Deleting file ID 1 (2010-2011) allows the 2020-2021 fiscal year data to be saved in file ID 1.

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