




Update tables

Table of Contents

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

Update the budget account code tables in the next year file ID (file ID N).

Click  to move all code tables from the left side of the page to the right side of the page.

Optional: Select **Preview Data** to view a preview of each Finance table before it is copied to Budget.

If **Preview Data** is selected:

- Click **Execute** to begin the process of copying the Finance tables to Budget. The selected Finance table reports are displayed.
- Review the reports and click **Process** on each report to copy the Finance table data to Budget and continue to the next report. Or, click **Cancel** on the report if you do not want to copy the selected table.
- When the process is complete, a message is displayed either indicating that all tables were successfully copied or that selected tables have not been copied. Click **OK**.

If **Preview Data** is not selected:

- Click **Execute** to copy the Finance tables to Budget. A message is displayed indicating that the selected tables have been successfully copied. Click **OK**.

If this step is not processed, account codes that exist in the Finance file ID but do not exist in the Budget file ID are not updated.

Note: This step adds the fund/fiscal year for the new school year.



Back Cover