



beforeyoubegin

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Review the following information and/or complete the listed steps before you begin the Finance close end of fiscal year process steps.

Review Finance Terms

Term	Description
CYR payroll frequency	Current year payroll frequency in Payroll.
June Year-End (early fiscal year)	A Finance fiscal year that runs July through June.
Export	A backup file of data as it stands at the time it is exported from the system. Export or backup files can later be used to restore data to its original state at the time of extraction.
File ID C	Current year file ID in Finance.
Historical file ID	Refers to any prior year file ID that is not the current year file ID.
LEA (Local Education Agency)	Refers to the educational entity (e.g., charter, district, etc.).
NYR payroll frequency	Next year payroll frequency in Payroll.
August Year-End (standard fiscal year)	A Finance fiscal year that runs September through August.

Prior to beginning this process, confirm that no users are logged on to Budget or Finance.

It is important to perform an export prior to making a significant change. This allows you to revert data to a certain point in the process, if necessary. Create backups using the [Finance > Utilities > Export by File ID](#) page. **Reminder:** Do not change the export file name as it may cause issues during the import process.



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