



Copy Current File ID to New File ID

Table of Contents

Log on to file ID C.

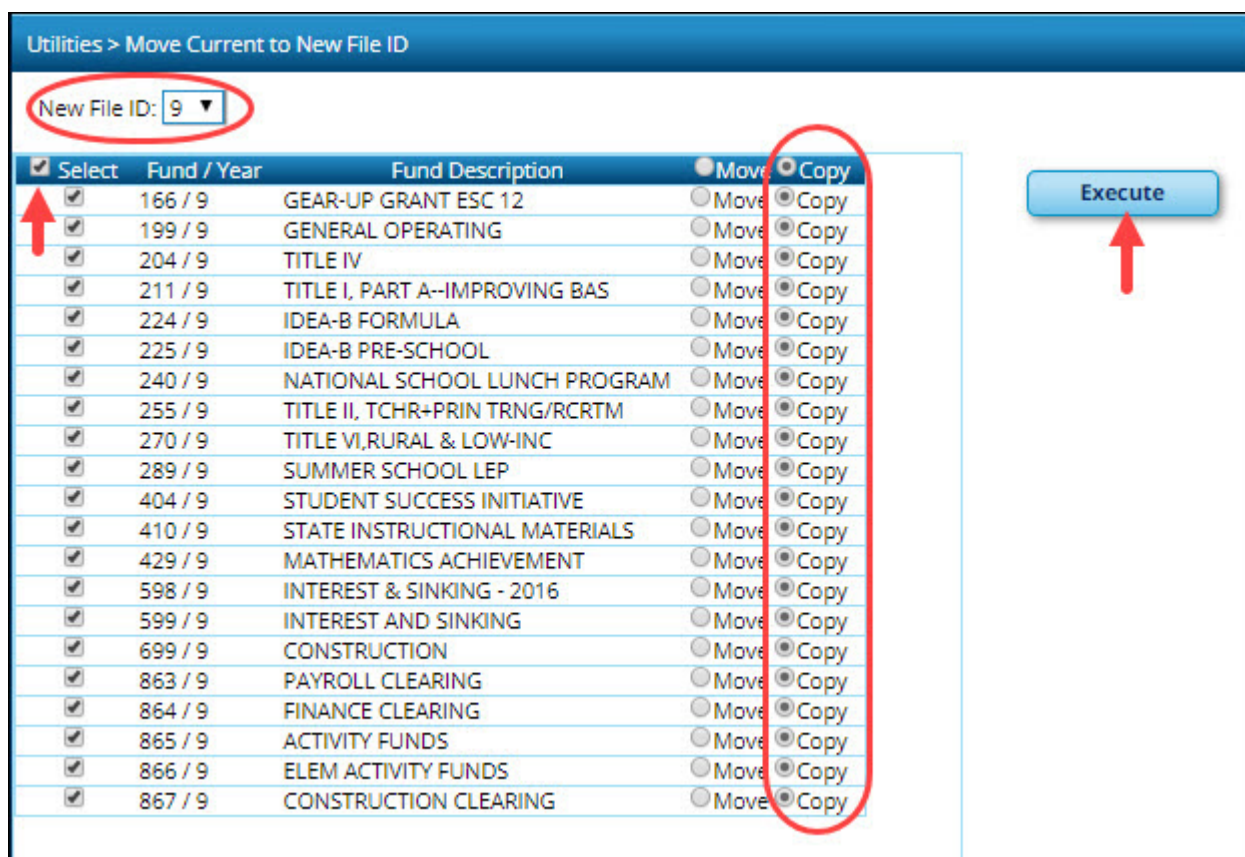
Finance > Utilities > Move Current to New File ID

Create the new historical file ID. Copy file ID C to the historical file ID 8. At this point, **All** fund/yr's should be selected to be copied or moved.

It is recommended that you **copy** rather than move all fund/yr's 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/yr's are copied to the new historical file ID 8; however, you can use a different file ID.

Image



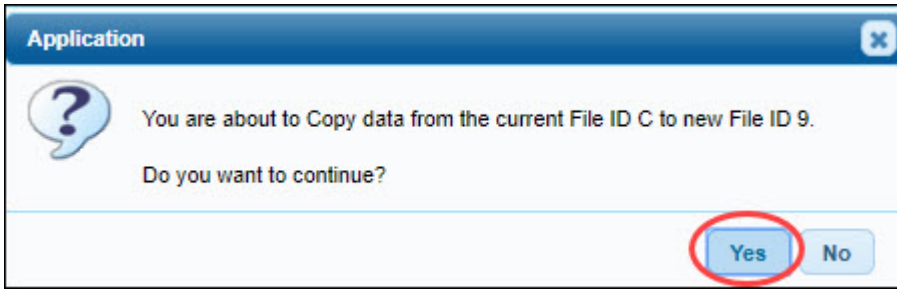
In the **New File ID** field, select the file ID to which you want to copy funds. The file ID can be alpha or numeric.

Select the funds to be copied.

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

Click **Execute**. The following message is displayed.

Image



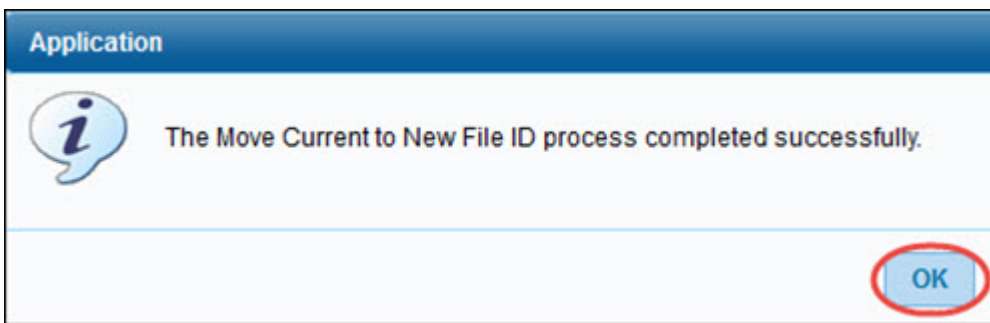
Click **Yes** to continue. You are prompted to create a [backup](#).

If any errors are encountered, an error report is displayed. Click **Process** to continue.

If no errors exist, a preview report is not displayed.

When the process is completed, a message is displayed indicating that the process was successfully completed.

[Image](#)



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.



Back Cover