



Copy Current File ID to New File ID

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Log on to file ID C.

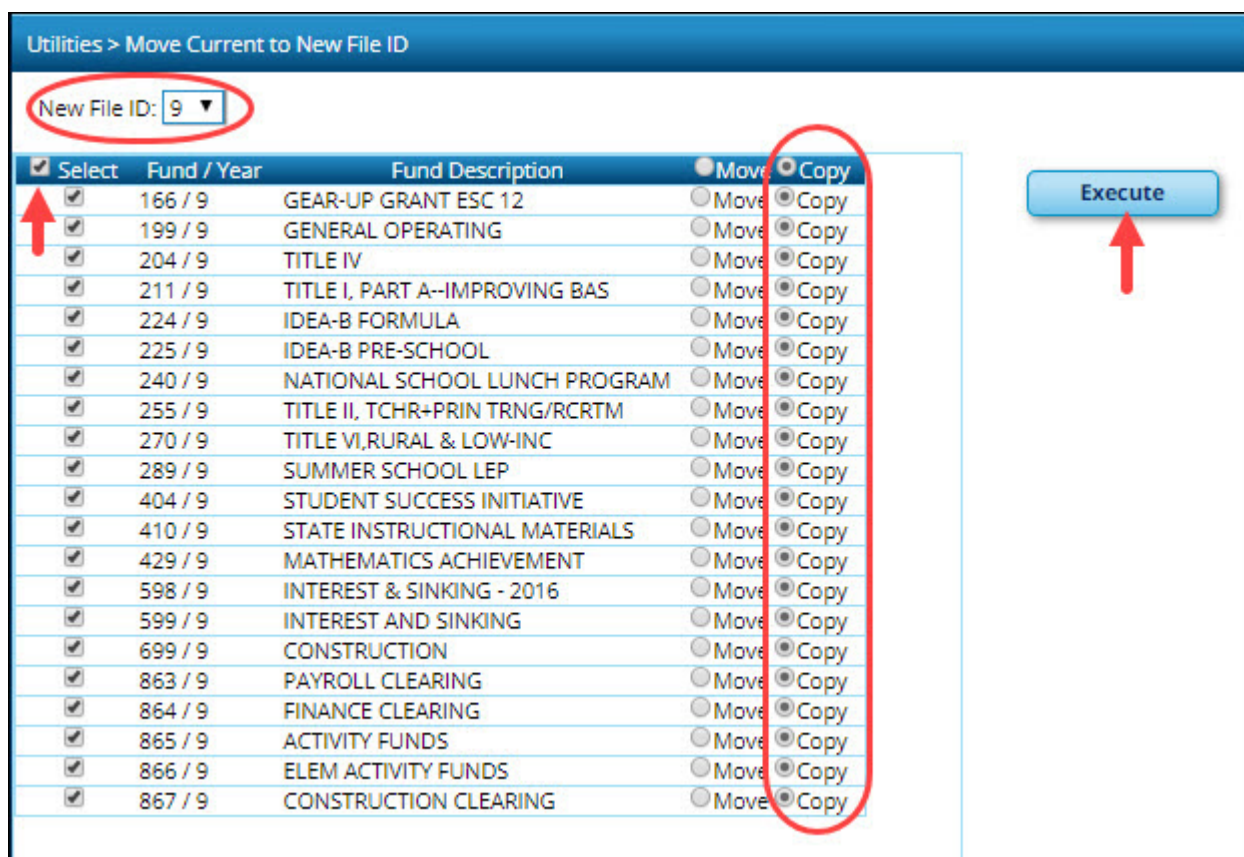
[Finance > Utilities > Move Current to New File ID](#)

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

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

[Image](#)



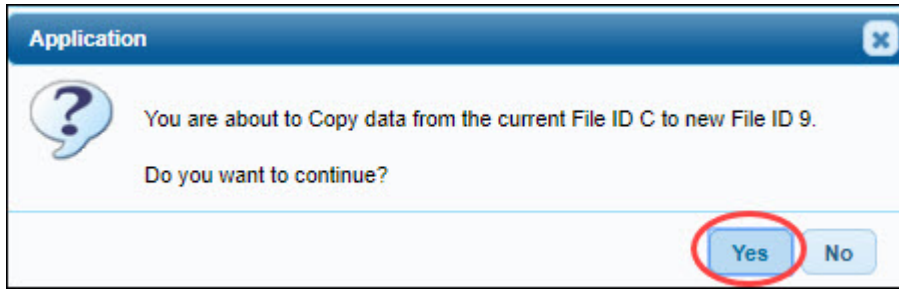
In the **New File ID** field, select the file ID to which you want to copy funds. The file ID can be alpha or numeric.

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](#)



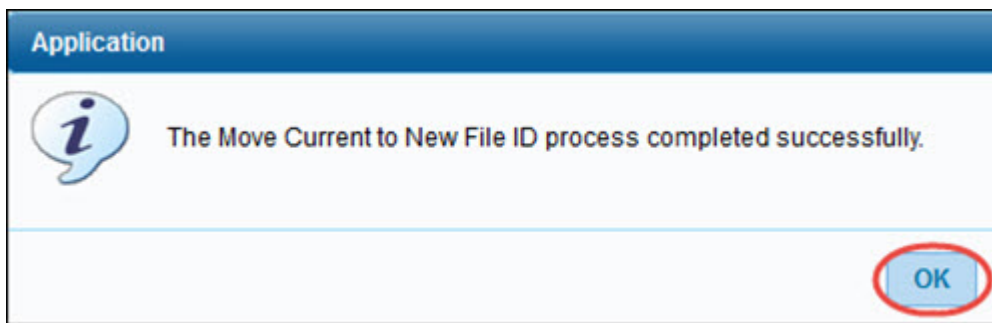
Click **Yes** to continue. You are prompted to create a [backup](#).

If any errors are encountered, an error report is displayed. Review and clear the errors.

If no errors exist, a preview report is not displayed. Click **Process** to continue.

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 the fund totals in file ID C and the new historical file ID.



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