

Importing Previous Year Data into Agvance

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Data from previous years can be imported into Agvance database tables offering the ability to run some reports across multiple years without logging into other data sets.

This utility is used for importing historical data into specific database tables.

This utility will need to be performed for each data type and each previous year's data set for which access is needed.

Setup

Prior to using this utility, the following should be completed:

- Run the red cross checkup in the Accounting Reports module for GL, Customers, Vendors, Inventory, and Budget Billing (if applicable). It is important to print or save a copy of the report for comparison after running the utility.
- Make a database image at *Hub / Utilities / Make Database Image*.
- Make sure no users are working when the utility is run. It is a good idea to have all users log out of the data prior to running the utility.

Once the above steps have been completed, in Agvance Hub, go to *Utilities / Admin Utilities / Hub* and select **Import Prior Year Data**. Select the *Prior Year* to import using the drop-down menu. If the *Prior Year* does not exist in the drop-down menu, manually enter the year and select **Add Year**. If adding the year, exit the *Import Prior Year Data* window and reopen to select the year in the drop-down menu. If multiple years will be imported, the most recent prior year should be imported first. For example, if importing FY2016 and FY2015, import FY2016 first.

In the *Prior Year Data Attached Name* field, enter the name for the prior year data set exactly as it was saved. This can be found from the database selection drop-down in the Agvance Hub.

The following Data Types are available to import:

- **Account Balances** – the *Start* month and *End* month filters cannot be entered for this import. The utility will bring in all balances for the year.
- **Bookings** – Filter the data to import using the *Start* month and *End* month.
- **Inventory Adjustments** – Filter the data to import using the *Start* month and *End* month.
- **Invoices** – Filter the data to import using the *Start* month and *End* month.
- **Journal Entries** - Filter the data to import using the *Start* month and *End* month.
- **Payments** – Filter the data to import using the *Start* month and *End* month.

Select **Import**. A message will display indicating the import is complete.

After the import is complete, run the red cross checkup in the Accounting Reports module again for GL, Customers, Vendors, Inventory, and Budget Billing (if applicable). Compare this checkup to the checkup which was run prior to

running the import utility. If the checkups match, users may resume working in the data.