

Year-End Copy: Start New Year and Archive

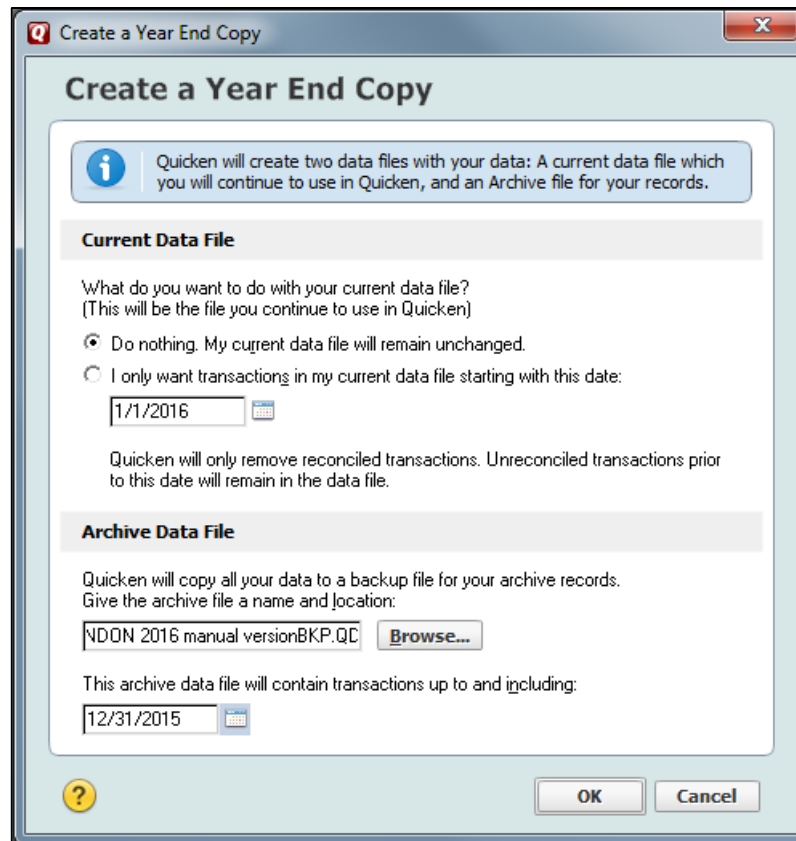
At the beginning of a new year or when files start getting large, people wonder whether they should reduce the size of their files or remove some data. Now that large files can be backed up on CD or thumb drive, this is a less frequent concern. We encourage you to maintain several years of data in the current file so that comparison reports showing performance by year can be easily created. However, if you must shrink the file size, the Year-End Copy feature allows you to reduce the size of your working file and/or archive older information. Click:

File

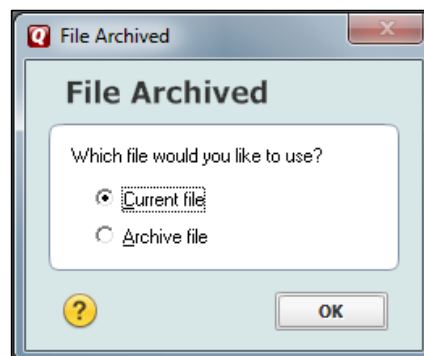
File Operations

Year-End Copy

Under the *Current Data File* heading, select ***Do nothing***. Your current file will then remain the same. You can create an archive copy to backup your data (good for storing in a different place for emergency purposes). Under the *Archive Data File*: select **Give the archive file a name and location**. Then select the end date for the archive file (all transactions up to this date will be copied).



Click **OK**



Click **OK** to continue using the Current file.

Note: Archiving differs from making a backup copy as you have control over the dates included in the file. As with a backup copy, the transactions are saved first. Attachments are included only if space is available.

Let's say that you've been entering financial records in Quicken since 2003 in a file called *FARM*. Now you want to modify the current file to include data starting January 1, 2010. Click


File

File Operations

Year-End Copy

To modify the current data file, click on **I only want transactions...** as in the screen that follows and indicate the **1/1/2010** starting date.

Create a Year End Copy


 Quicken will create two data files with your data: A current data file which you will continue to use in Quicken, and an Archive file for your records.

Current Data File

What do you want to do with your current data file?
(This will be the file you continue to use in Quicken)

Do nothing. My current data file will remain unchanged.

I only want transactions in my current data file starting with this date:





Quicken will only remove reconciled transactions. Unreconciled transactions prior to this date will remain in the data file.

Archive Data File

Quicken will copy all your data to a backup file for your archive records.
Give the archive file a name and location:

This archive data file will contain transactions up to and including:



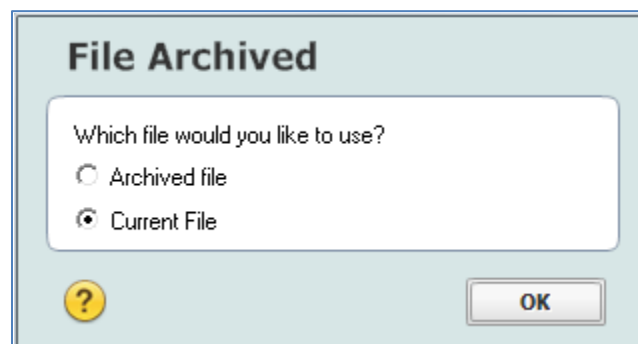


Click OK.

The new file created will be reduced to transactions for the date selected and forward (see note below) and will be given a new name that matches the archive file name. An archive file will automatically be created at the same time with the name and location you choose. The archive file includes everything in the current file.

Note: If you have not reconciled your accounts, the transactions will transfer with the file even if they are outside of the date range selected. Investment transactions will transfer regardless of cleared status.

When the data file has been updated (if selected) and the archive file has been created, you will choose which file to use. In our example, we created a new file using the last five years only, so we will select the **Current File**.



Click **OK**