

CHAPTER 9- YEAR END FILE MANAGEMENT

With the increased capacity and power of today's computers, five years of data or more can easily be kept in the data file while adding the current year's transactions. For instance, data from 2011, 2012, 2013 and 2014 can be kept in the same file while transactions for 2015 are being added. Keeping several years of data in the same file allows you to make comparison reports, graphs, etc. It also makes it easier to go back to find an earlier income or expense transaction. However, at some point you may decide to reduce the number of years of data in your data file.

Note: Make sure that your current file is backed up before beginning any year-end file management.

Making an Archive of a data file

From the main menu bar complete the following task:



Click File

Click File Operations

Click Year-End Copy to open the "Year-end Copy" window.

There are two sections of the Create a Year End Copy window.

The first is the Current Data File section, for now select Do nothing so your current file will remain unchanged.

The second section of the window is Archive Data File.

Use the Browse and field to change the file name and location of this archive data file to be created but keep the portion BKP.QDF in the file name (FarmName BKP.QDF).

Note: Archiving is a good idea to consider and save the archive file in a different place than your backups.

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Click OK



Click OK to return to using the Current file.

The difference between Archiving and making a Backup is Archiving gives you control over the dates included in the Archive file. As with a Backup, the Archive saves transactions first, and attachments are included if space is available.

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Reducing the Size of a Data File

A Quicken file may contain data for multiple years. Let's say there are 10 years (2005-2014) plus the current year 2015. The farm manager now does not use or review all those years because the farm has changed enough that comparisons are not as useful from 7-10 years ago to recent years. Now we can modify the current data file.

From the main menu bar complete the following steps:



Click File

Click File Operations

Click Year-End Copy

Because 2013 and newer transactions are now important to this farm:

Click on "I only want transactions"

Enter the date 1/1/2013.

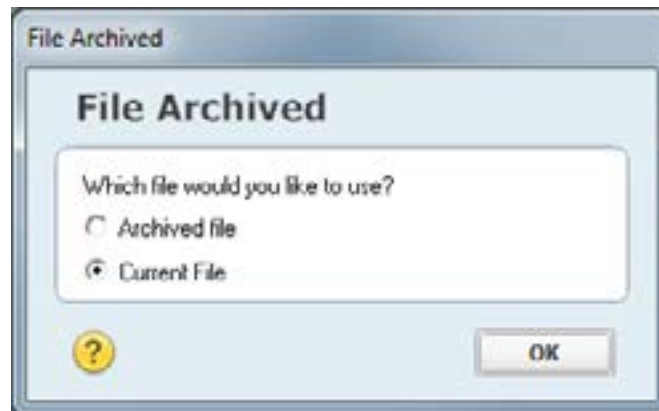


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The new file created will be reduced to transactions for the data selected and forward and will be given a new name that matches the archive file name. An archive file will automatically be created at the same time with the name and location you choose.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

Click OK

Quicken will ask which file to use. By selecting Current File, you'll use the modified (shorted) data file that contains the most important years of transactions for comparison reports.



Click OK

Note: It is not recommended to start a new data file when the current one is large. If the farm business went through a name change or major shifts, then a new data file may be appropriate.