

Postgres Budget Copying a Database

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Making a copy of a database allows user to save data as it is at a given point in time. A common use of this is to save data before doing a year-end close where records are going to be removed from the regular Budget database. By having a copy you could still access the removed data. To make a copy of a database do the following steps:

- 1- Open the regular Budget database and open:
'Other Functions–Manage Database–Copy Database'.
- 2- Enter your normal connect password and press Tab.
- 3- Enter the new database name (ex: Budget-2018-19 or whatever name would best describe the time period being copied - do not enter spaces or slashes as part of the name).
4. Click on "**Create/Connect**".
5. After a few seconds "Connected" should display.
6. Click on "**Copy Database**" to begin. The new database will be created although you would have to exit from budget and re-open and 'connect' to it in order to access it.

The newly copied database name will be added to the database name drop-down list on the connect screen (if the new name is not in the drop-down list then type the name in manually and it will be added to the drop-down list). You can tell which database is open by viewing the name displayed at the bottom of the main menu. You can also make a further distinction between databases by (after connecting to a database) opening "Options–General" and entering something in "Abbrev Name" that would describe the database currently open. This text will also display at the bottom of the main menu.

Warning: The last database name connected to will be the assumed name when connecting to Budget the next time. Therefore if you open a copy of a database be sure and change the logon screen back to the regular "Budget" database name the next time you log in.