

2017 Business Forms—import and update from 2016

Here's how to import old 2016 ATPs into the new 2017 forms so **staff making ATPs and Purchase Requisitions** don't have to reenter vendor information, and can move their ATP and Purchase Requisition archives into the new forms:

1. If open, exit FileMaker Pro.
2. Open the folder "SOESD Business Forms 2017" and highlight "Forms Menu.fp5" by clicking once.
3. **On a Macintosh**, hold down the Option key while double-clicking "Forms Menu.fp5" from the "SOESD Business Forms 2017" folder. Hold Option down until you're prompted for a password. (If you're not prompted, you didn't hold it down long enough. Try again.)
4. **In Windows**, hold down the Shift key while double-clicking "Forms Menu.fp5" from the "SOESD Business Forms 2017" folder. Hold Shift down until you're prompted for a password. (If you're not prompted, you didn't hold it down long enough. Try again.)
5. Enter the password to allow exporting: xp0rt.
6. Click on the "Authorization to Pay" tab.
7. **Optional:** If you wish to limit the records imported from the 2016 forms into the new 2017 forms, select those files now as follows:
 - a. From the file menu, select "Open".
 - b. Navigate to the "SOESD Business Forms 2016 Aug-Dec" Folder, open the "Forms" folder, and open "Authorization to Pay.fp5".
 - c. Using "Find", select those records you wish to import into the 2017 forms.
 - d. Close the file.
8. From the File Menu, choose "Import Records".
9. Navigate to the "SOESD Business Forms 2016 Aug-Dec" folder, open the "Forms" folder, and open "Authorization to Pay.fp5".
10. From the "View By" popup menu, select "Matching Names".
11. Click "Import".
12. Click OK.
13. You may repeat this procedure for purchase requisitions.

For the rest of us, who just want to fill out local travel and not have to type in **Departure Locations, Travel Destinations and Purposes for Travel** all over again, here's what to do:

1. If open, exit FileMaker Pro.
2. Open the 2016 Business Forms by double-clicking "Forms Menu.fp5" from the "SOESD Business Forms 2010 Aug-Dec" folder. (Don't hold down the Shift key or any of that other stuff.)
3. Click on the "Customize" tab
4. Highlight and then copy the information from 2016 you want in your 2017 forms. (Sorry, you can't do all three boxes at once: you have to do them one-at-a-time.)
5. Close all the 2016 forms, then open the 2017 Business Forms by double-clicking "Forms Menu.fp5" from the "SOESD Business Forms 2017" folder.
6. Click on the "Customize" tab and paste last year's info into this year's box.
7. Repeat for each of the other two boxes. (Remember that you have to quit/exit FileMaker Pro or close the 2016 forms successfully each time you move between 2016 Business Forms and 2017 Business Forms.)

Local Travel Form Pop-Up Menus

Information entered below will display in Local Travel Form Departure Location, Destination, and Purpose for Travel pop-up menus. Entering frequently used locations and purposes here will allow you to select them quickly from lists when filling out the travel forms, instead of having to type them in manually in each entry.

You can always return to this screen and complete or modify the section below. Changing information here at any time will only alter the items available in the lists, and will not affect your entries on existing forms.

Add or delete entries in the lists below. Enter one item per line.

Departure Locations	Travel Destinations	Purposes for Travel
Home SOESD Gilbert Creek SOESD Grants Pass SOESD Klamath Falls	Home SOESD Gilbert Creek SOESD Grants Pass SOESD Klamath Falls	Meeting

2008 [v2k8.2]
Revised 1/5/2008

Revised 1/31/2017
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