

Copy Evaluation Periods

Last Modified on 10/22/2022 10:11 am CDT

PATH: *Staff Evaluations > Staff Evaluations Setup > Evaluation Periods*

PATH: *Human Resources > Administration > Staff Evaluations Setup > Evaluation Periods (HR-enabled)*

Copying an Evaluation Period allows you to quickly set up a new Evaluation Period with the same [Rating Scales](#), [Categories](#) and/or [Evaluation templates](#) from a previously configured Evaluation Period.

Campus does not *require* copying Rating Scales, Categories and Evaluation templates. However, Rating Scales must be selected in order to copy Categories and Categories must be selected in order to copy Evaluations.

The screenshot shows the 'Evaluation Periods' management interface. A table lists various evaluation periods, with 'SUM 14 Summer 2014' selected. The 'Copy' button in the toolbar is highlighted with a red box. A 'Copy Evaluation Period' dialog box is open, also outlined in red. It contains the following fields and options:

- New Evaluation Period** section:
 - *Code: [Text input field]
 - *Description: [Text input field]
 - *Start Date: [Date picker]
 - End Date: [Date picker]
- Copy the following:** section:
 - Please Note: Rating Scales must be selected to copy Categories and Evaluations
 - Rating Scales:
 - Categories:
 - Evaluations:
- Buttons: Complete Copy, Close

Complete the following steps to copy an Evaluation Period.

1. Select the Evaluation Period you want to copy and click the **Copy** button.

Result

The Copy Evaluation Period window displays.

2. Enter a unique **Code** to identify the Evaluation Period.
3. Enter a **Description** of the Evaluation Period.
4. Enter the first date of the Evaluation Period in the **Start Date** field.
5. Enter the last day of the Evaluation Period in the **End Date** field. *(optional)*
6. Mark the checkbox next to the item(s) you want to copy: **Rating Scales, Categories** and/or **Evaluations**.

Rating Scales must be selected in order to copy **Categories** and **Categories** must be selected in order to copy **Evaluations**.

7. Click the **Complete Copy** button.

Result

A confirmation window displays.

8. Click **OK**.

Result

The new Evaluation Period displays in the Evaluation Period group.
