Copy Evaluation Templates

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

PATH: *Staff Evaluations > Staff Evaluations Setup > Evaluations*

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

Copying an Evaluation Template allows you to quickly set up a new Evaluation Template with the same parameters from a previously configured Evaluation Template. If they do not already exist, the copy process automatically copies Categories, Elements, Sub-Elements and Rating Scales into the Evaluation Period you select. You can change the Categories, Elements and Rating Scales after copying the Evaluation.

Any changes you make to the Category will affect the other Evaluation Templates associated with the Category.

The Evaluation Code will be the same as the original Evaluation and cannot be modified.
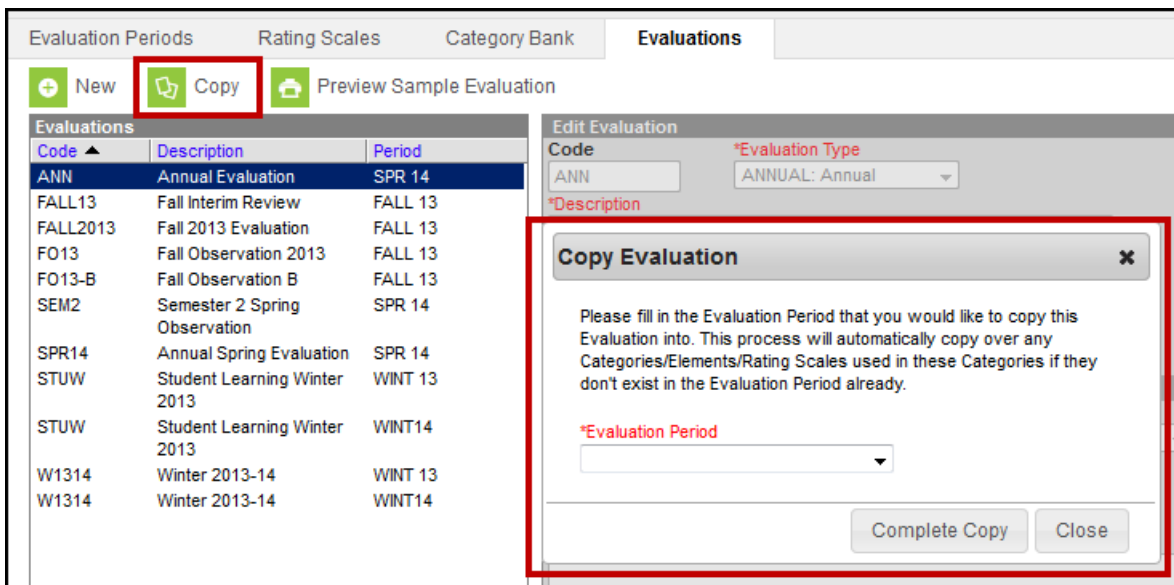
Complete the following steps to copy an Evaluation.

1. Select the Evaluation you want to copy and click the **Copy** button.
   Result
   The Copy Evaluation window displays.
2. Select the **Evaluation Period** into which you want to copy the Evaluation.
3. Click the **Complete Copy** button.
   Result
   A confirmation message displays.
4. Click the **OK** button.
   Result
   The new Evaluation displays in the Evaluations Group. You may edit the Evaluation as

necessary.