samegoal

Copy To New Document

Creating a new document by copying from an existing document can be a great tool to help save time year to year. When copying to a new document, generally many fields will copy forward except for dates, signatures, and deliberations/meeting notes. (In some cases, depending on document type and district policy, there may be other select fields that don't copy forward.)

In order to copy to a new document:

- The existing document needs to be marked complete.
- You need to have permission to create new documents of the given form type.
- It must not be disabled by administrative users at the form level.

Copy to a new document

Steps *To copy to a new document:*

1. Navigate into the document you want to copy from.
2. Click the lock icon in the toolbar and select **Copy to a new document**.
3. Click **Copy Document >>** to continue.
4. You will receive a popup giving you the option to share the new documents with the same people. If you wish to do so, click the checkbox.
5. Click **Copy document**.

Bulk copy to a new document

Steps *To copy to a new document in bulk:*

1. Visit a document list page to find the document(s) you want to copy from.
2. Search for the documents you wish to copy. You can use filters as needed.
3. Select the documents you want to copy.
4. Click on the **Actions** menu button and select **Copy to a new document**.
5. Click **Copy Document >>** to continue.
6. You will receive a popup giving you the option to share the new documents with the same people. If you wish to do so, click the checkbox.
7. Click **Copy document**.

Tip Do not use copying a document as a substitute for creating a formal amendment or correcting completed documents. Doing so can cause serious state reporting issues.