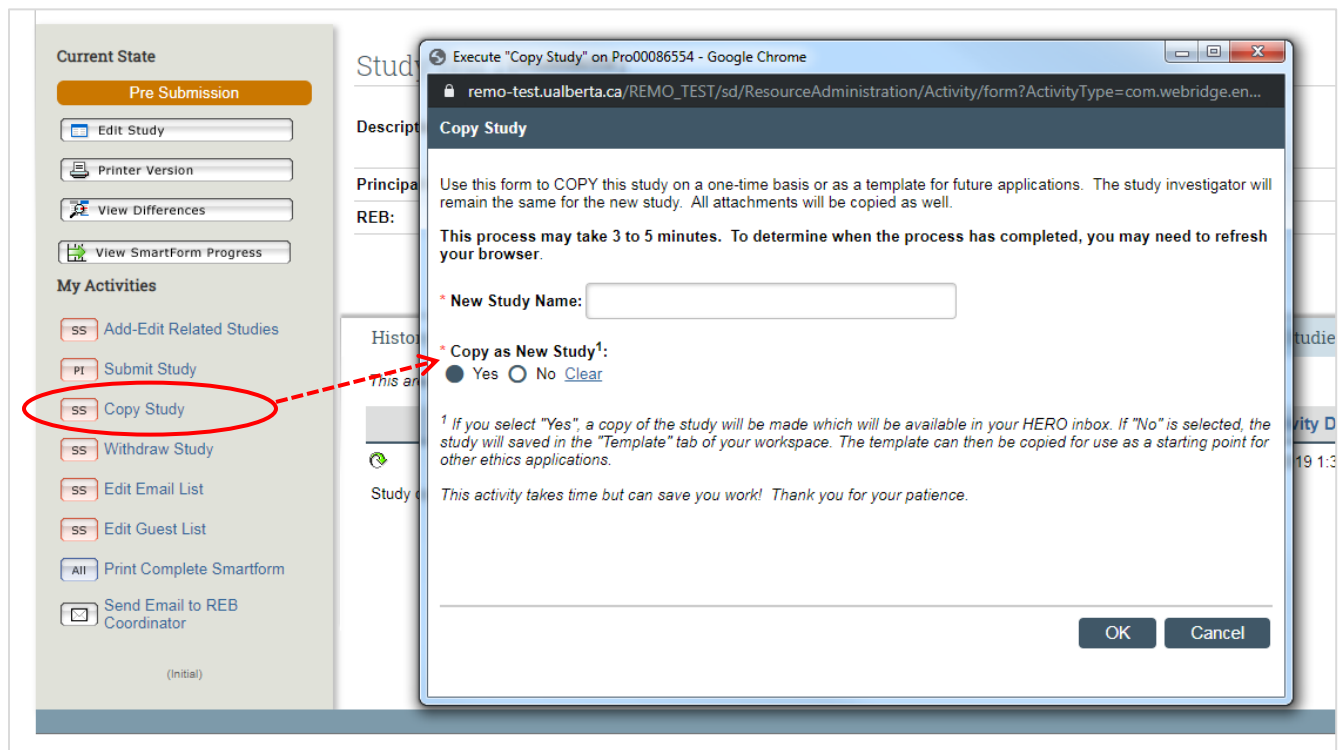# How To...

Copy Study or Create a Template

The "Copy Study" button allows you to:

- make a copy of your existing application as a new application/study to be submitted for review; or
- make a template application, which can then be used to create a new application/study.
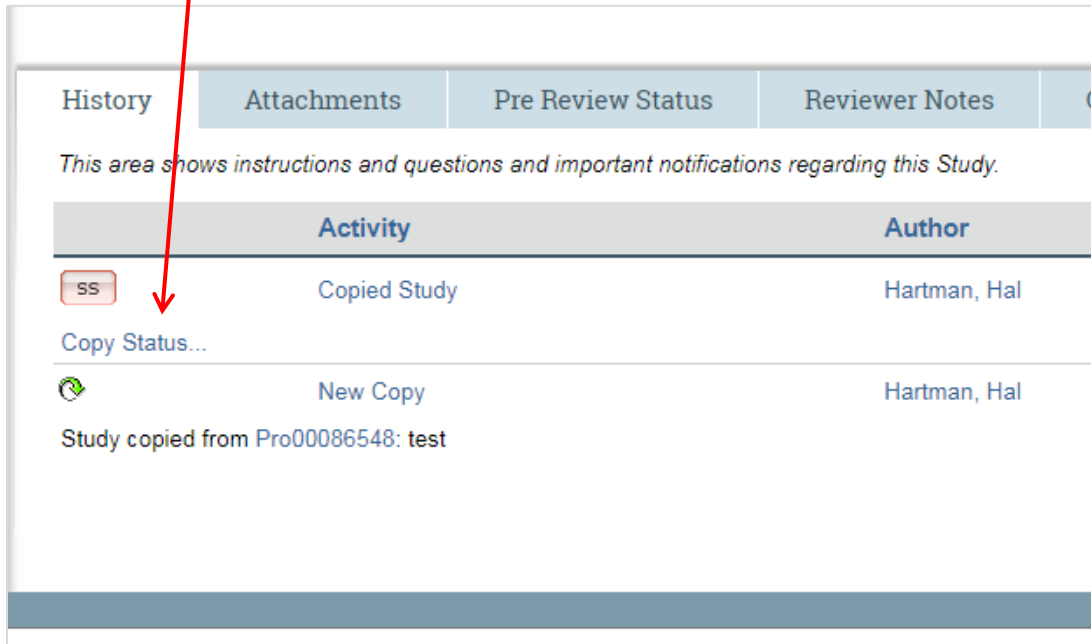
The "Copy Study" button is available for use on applications in Pre-submission (application not yet submitted for review), Approved or Completed states. ***All responses from the application, including uploaded documents, will be copied. Therefore, carefully revise/edit the new application prior to submitting for review.***

Procedure:

1. Select the application you wish to copy (Dashboard, either Human or Animal tab) and click "Copy Study" button.
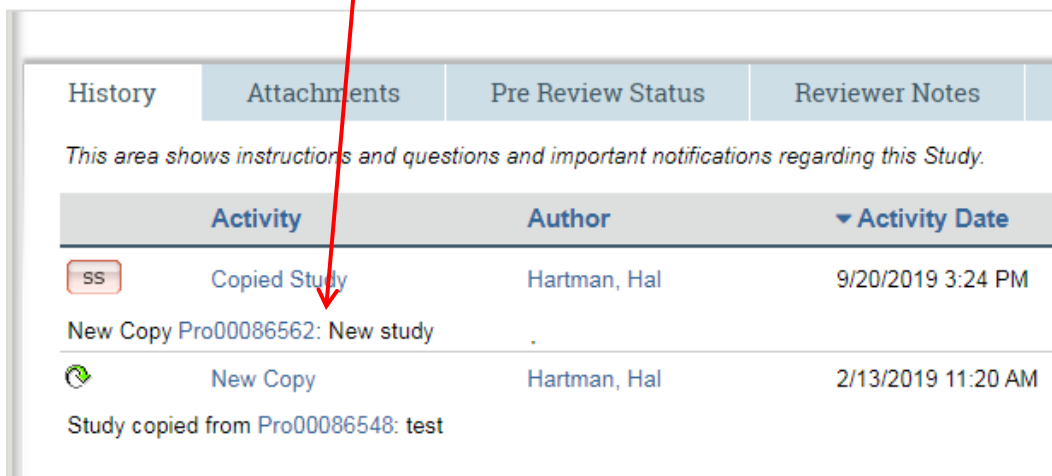
2. In the Copy Study pop-up window (shown above), enter a new name (can be edited later on) and answer "Copy as new study":
   - Yes – will copy the application as a new study to be submitted for review;
   - No – will copy the application as a template.

3. Click OK to start the copy process, which can take 3-5 minutes. During this delay, you will see:
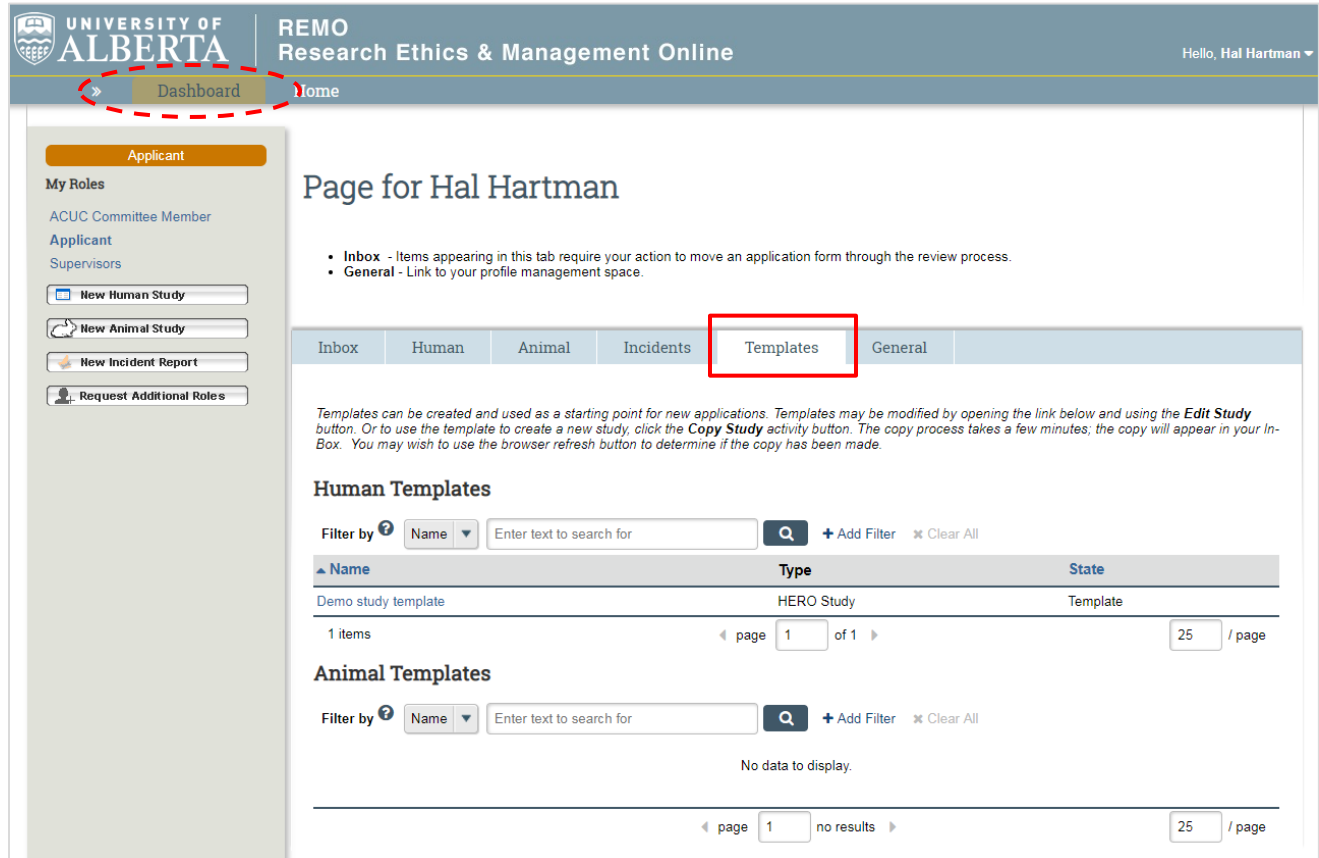
	Activity	Author
ss	Copied Study	Hartman, Hal
Copy Status...		
↻	New Copy	Hartman, Hal
Study copied from Pro00086548: test		

History | Attachments | Pre Review Status | Reviewer Notes | C

This area shows instructions and questions and important notifications regarding this Study.

4. Click the browser Refresh or Reload button [⟳] periodically. Once copying is completed, "Copy Status…" will change to "New Copy XXX: Name":

	Activity	Author	▼ Activity Date
ss	Copied Study	Hartman, Hal	9/20/2019 3:24 PM
New Copy Pro00086562: New study			.
↻	New Copy	Hartman, Hal	2/13/2019 11:20 AM
Study copied from Pro00086548: test			

History | Attachments | Pre Review Status | Reviewer Notes

This area shows instructions and questions and important notifications regarding this Study.

5. The copied study or template will have an identifying Pro# or AUP#. You can click on the new Pro# or AUP# to go to that application workspace to edit the copied study or template. Otherwise, you can find the new application in your **Inbox**, or if you created a template, you can find it under the **Templates tab** of your Dashboard.

Procedure: Create new study from Template

1. To use a Template you've previously created, select the template from the Templates tab (under Dashboard).

2. Click "Copy Study". In the pop-up window, type in a Name and select <u>Yes</u> to "Copy as new study":

3. See **Steps 3, 4, and 5** above for the same final steps to working with your new study application.

If you have any difficulties with the processes outlined above, please contact the Research Ethics Office by email (reoffice@ualberta.ca) or call 780-492-0459.