

ActiveEvents Conference Copy Event User Guide

The Copy Event Wizard in ActiveEvents Conference™ lets you quickly copy data and configuration settings from one event to another. This is especially useful if you are setting up a new event that is similar to an existing one.

To use this copy feature, go to the event where you want to add copied data and choose **Setup > General > Initial Setup > Copy Event Wizard**. For instructions and details, read the remainder of this document.

IMPORTANT

To use the Copy Event Wizard, you must have a user account with the System Administrator security role for these events:

- **Source event**—The event that contains the data or settings you want to copy
- **Destination event**—The event to which are copying the data or settings

For more information, see [System Administrator security role](#) on page 23.

This guide includes these sections:

Copying

Complete these tasks to use the Copy Event Wizard:

- [Preparing to copy](#) (see page 2).
- [Copying data or settings from one event to another](#) (see page 3).

Technical Details

Refer to these sections as you have questions or want to learn more:

- [What is included with each copied item](#) (see page 9).
- [How to track the source of copied data](#) (see page 20).
- [System Administrator security role](#) (see page 23).
- [Troubleshooting](#) (see page 24).

Copying

The Copy Event Wizard lets you quickly copy data and configuration settings from one event to another. You can choose to copy the following categories of settings and data:

Table 1: Overview of copy categories

Module	Category	Module	Category
General	Custom fields Custom field locations Custom reports Global event preferences Predefined emails Standardized companies Security roles Static text	Content	Call for Papers (CFP) paths Content roles Content tasks Sessions Session types
Registration	Attendee type roll-ups Registration packages Registration paths	Exhibitor	Exhibitor registration path Exhibitor roles Exhibitor tasks Exhibitor packages

You can choose to copy all items in a certain category, or drill-down and choose just specific items. (For example, you may copy all custom fields in the source event or choose only specific custom fields to copy.)

As an item is copied, all dependencies are also copied. (For example, if you choose to copy a registration path, the system also copies all of the attendee types, registration packages, custom fields, and emails associated with that path.) For details on what is copied when each item is selected, see [What is included with each copied item](#) on page 9.

This section explains these tasks:

- [Preparing to copy](#)
- [Copying data or settings from one event to another](#)

Preparing to copy

Before you copy event data or settings, complete the following steps.

To prepare for copying

1. If this is your first time using the Copy Event Wizard, read through this guide or talk with your Business Analyst to make sure you fully understand how copying works, what the system will copy for each copied item, and any cautions associated with copying.
2. Make sure you are assigned as a System Administrator for both the source and destination events. (For details, see [System Administrator security role](#) on page 23.)
3. Make sure you fully understand what data you will be copying from the source event. If you are not very familiar with the source event, go to the Conference Admin Tool for that event and review the data and settings to determine what you want to copy.
4. As necessary, review the destination event to make sure you will not be copying anything that will replace data or settings you want to keep. If an item that you are copying already exists in the destination event, the copy process usually overwrites that item with the item copied from the source event; however, there are a few exceptions where the existing item is retained.

For a list of what is copied and whether it replaces an existing item, see [What is included with each copied item](#) on page 9.

WARNING

Once you copy something, there is no way to “uncopy” it. To change the destination event back to the way it was before, you would need to manually delete the copied records or manually change the settings.

Copying data or settings from one event to another

If you are setting up a new event that is similar to an existing one, you can copy data or settings to speed up your setup time.

You may also want to copy just a few items or settings from one event into another existing event. In this case, please discuss your plan with your Business Analyst to make sure you fully understand which existing items or settings in the destination event will be replaced by copied items or settings.

Before you begin

If you have not already done so, complete the tasks in [Preparing to copy](#) on page 2.

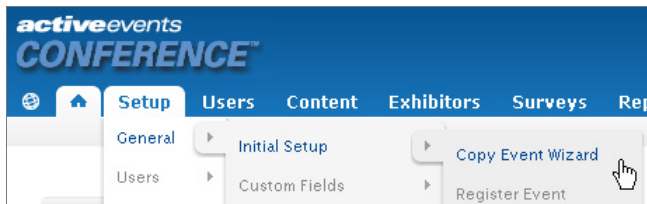
Also, make sure you have adequate time for the copy to be performed. Depending on the number of categories you are copying and the amount of data in each copied item, the copy process may take several minutes to several hours.

NOTE

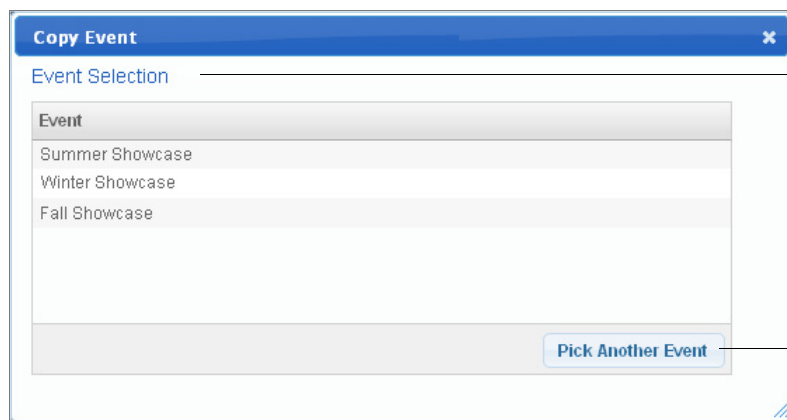
If you plan to copy a large amount of data, you may want to copy just a few categories at a time.

To copy data or settings from one event to another

1. Log in to the Conference Administrator Tool for the destination event (the event to which you want to copy data).
2. From the top menu bar, choose **Setup > General > Initial Setup > Copy Event Wizard**.



The Copy Event dialog displays, showing the possible source events in the Event Selection list:



This list shows the events in the ActiveEvents Console for which you have been assigned an owner.

Use this button only if your Business Analyst instructs you to do so.

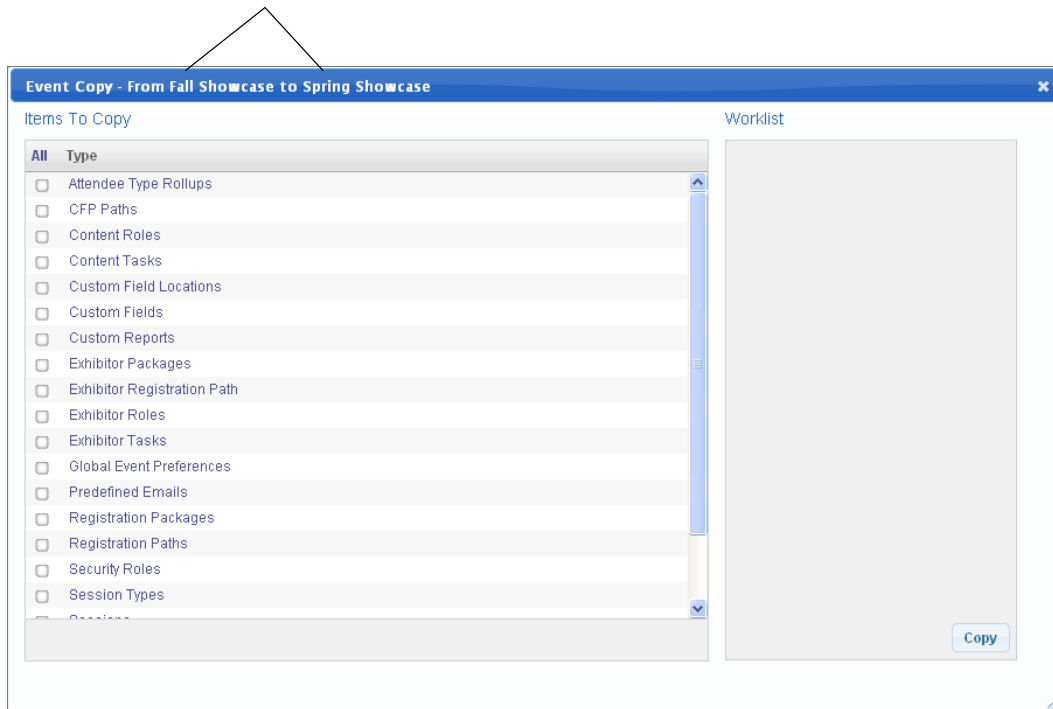
NOTE

The Event Selection list includes only those events for which you are assigned an owner in the ActiveEvents Console, or all events if you are a Full Access administrator. If you want to copy from an event that has is not currently in the Console, talk to your Business Analyst. (For example, you may be able to copy limited data from last year's Conference event if it was branched with the 5.2 code release. Custom programming may be required.)

3. Click the name of the event that contains the data or settings you want to copy (the source event).

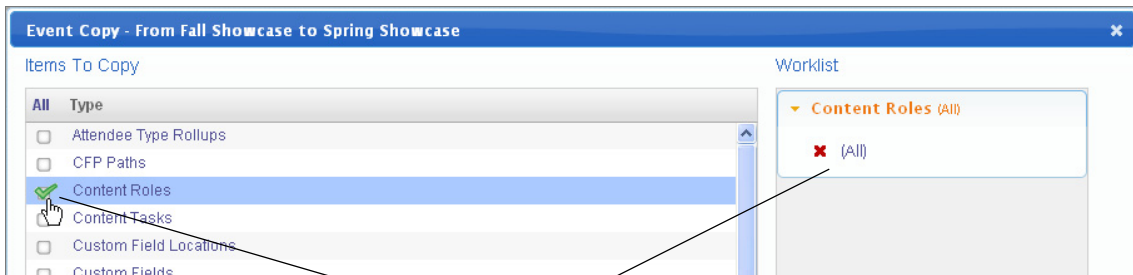
The Items to Copy list displays:

The title bar shows your source and destination events. In this example, the user logged in to Spring Showcase (the destination event) and has chosen to copy from Fall Showcase (the source event).



If this list does not display a category you plan to copy, the items in that category have not yet been set up in the source event; therefore, there is nothing to copy.

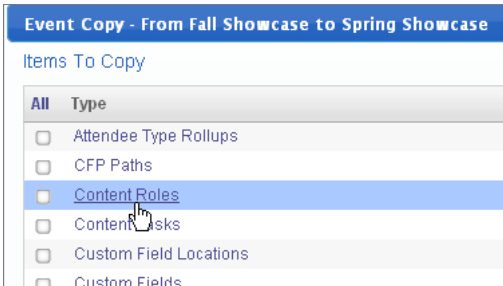
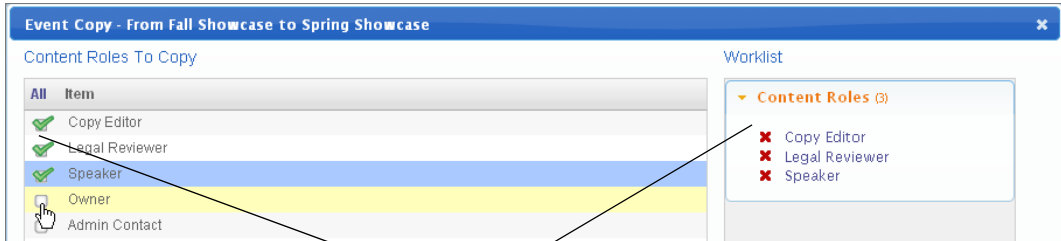
4. Use one or both of these methods to select the items you want to copy:
 - To copy all of the items in a certain category, mark the check box next to that item:




If you mark the All checkbox, then the Worklist shows that all have been selected for that category.

- To copy specific items in category, complete these steps:

To select specific items to copy

1. Click on the category name:
 
2. Mark the check boxes next to the individual items that you want to copy:
 

If you select individual items, then the Worklist shows which items have been selected for that category.
3. Click the **Previous** button to return to the category list:
 

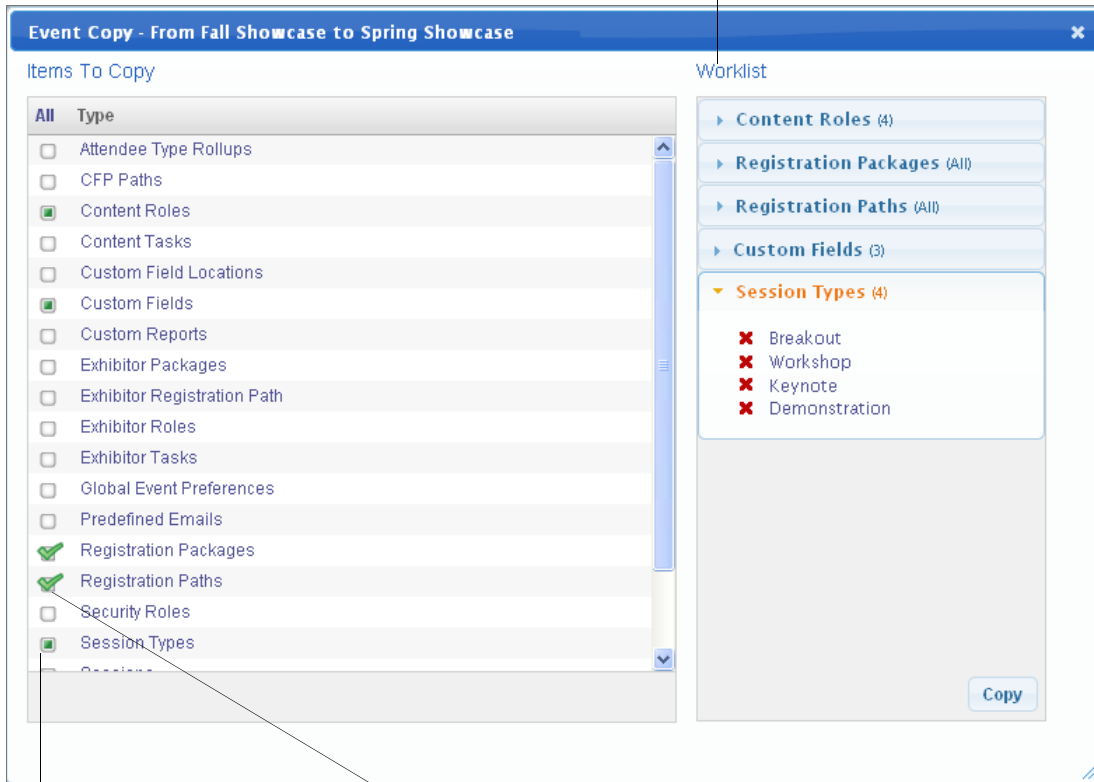
- 5. Repeat step 4 to select additional categories or individual items to copy.

NOTE

The first few times you use the Copy Event Wizard, you may want to copy only one category at a time until you become familiar with the copy process and how long it takes. You can then return to the Wizard to make additional selections later.

After you have selected multiple items, the Worklist pane summarizes all the items you have selected to copy:

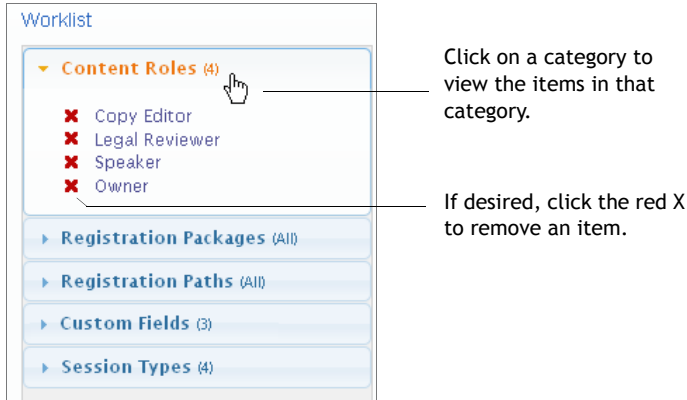
Look in the Worklist to see which categories and specific items have been selected for copy.



A filled in box indicates that only selected items will be copied.

A check mark indicates all items in that category will be copied.

6. If you change your mind and no longer want to copy certain items, remove those items from the Worklist:



7. When you are ready to begin the copy process, click **Copy**.



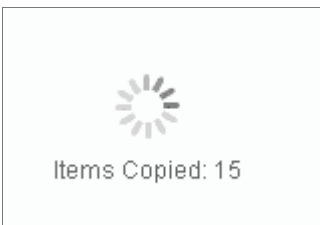
WARNING

Remember that once you copy something there is no way to “uncopy” it. To change the event back to how it was, you would need to manually delete records or change settings.

8. Click **OK** to confirm that you want to copy the items selected:



The page shows the progress as individual items are copied:



When the copying is complete, the Copy Event Results page displays:

Item	Status
Content Roles	
Copy Editor	Success
Legal Reviewer	Success
Speaker	Success
Owner	Success
Custom Fields	
Attendee Type	Success
AV Audio Equipment	Success
AV Media Equipment	Success
T-Shirt Size	Success
Industry	Success
Predefined Emails	
Order Confirmation	Success
Hotel Order Confirmation	Success
Registration Packages	
Full Conference Pass	Success
Exhibitor	Success
Lab - Software	Success
Lab - Hardware	Success
Registration Paths	

NOTE

Even if you did not choose to copy a certain category of items, those items will be copied if they are part of another item that you copied. For example, if you copy a Registration Path, the system will also automatically copy the Custom Fields, Inventory Items, and Predefined Emails for each of the paths that you copy. (For details on what is copied with each item, see [What is included with each copied item](#) on page 9.)

9. When you are finished reviewing the Copy Event Results page, click the X in the upper-right corner to close the window.
10. As necessary, repeat this task to copy additional data or settings.

Technical Details

Refer to this section as you have questions about copying events.

This section explains these topics:

- [What is included with each copied item](#)
- [How to track the source of copied data](#)
- [System Administrator security role](#)
- [Troubleshooting](#)

What is included with each copied item

IMPORTANT

This section is still in Beta testing and is not yet complete. If you are not able to find the information you are looking for, please talk with your Business Analyst. Additional information will be included in future releases.

When you copy an item, any dependencies are also copied. For example, if you copy a session record, the system also copies the session type and its associated length.

Refer to the tables in this section to learn:

- What is copied when you choose to copy an item in a specific category.
- Whether the copied item replaces an existing item.

Table 2: General Administration

Category	Copy Details	Replaces Existing?
Custom fields	<p>Included in item copy The following configured at Setup > General > Custom Fields > Custom Fields: The custom field and any values (list items) for that field.</p> <p>Dependent items also copied None</p>	<p>YES If field with same code is found, replaces existing field.</p>
Custom field locations	<p>Included in item copy The following configured at Setup > General > Custom Fields > Custom Field Locations:</p> <ul style="list-style-type: none"> • The location (profile page). • The list of custom fields assigned to the location. • All properties for the fields as set up for that location including display text, field type, required, read only, height, max length, section, parent value, display order. <p>Dependent items also copied</p> <ul style="list-style-type: none"> • The custom fields and any values (list items) for those fields. 	

Table 2: General Administration

Category	Copy Details	Replaces Existing?
Custom reports	<p>Included in item copy</p> <p>The following configured at Reports > Create Custom Report:</p> <ul style="list-style-type: none"> • General report parameters including name, description, code, location in navigation, whether it is viewable. • Graph details including type, width, height. • SQL reports written by ActiveEvents Developers, if the SQL uses codes and not IDs for the data. Works for events on release 6.2 and later. <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Items included on the report including custom fields, flags, etc. • Attendee type roll-ups <p>Not copied</p> <ul style="list-style-type: none"> • Security roles assigned to the report. • Registration package dependencies (such as a report that asks for anyone with a certain package). • Registration codes or reg code groups. <p>NOTE: You cannot copy custom reports that include registration codes or registration code groups unless a code and group of the same name already exist in the destination event.</p>	
Global event preferences	You should drill-down to choose which group of preferences to copy. For details on each preference group, see Table 3: Global Event Preferences on page 11.	See Table 3.
Predefined emails	<p>Included in item copy</p> <p>The following configured at Setup > General > Email Messages > Predefined Emails:</p> <ul style="list-style-type: none"> • General email parameters including name, description, code, and email flag. • Messages and message parameters including name, code, from address, from personal name, CC and BCC lists, subject, body, email type (HTML, URL, or text). • Attachments on messages <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Custom field values that qualify someone to receive the email. 	
Standardized companies	<p>Included in item copy</p> <p>The following configured at Users > Standardization > Company:</p> <ul style="list-style-type: none"> • Company profile including name and address. • Mapping of company name to aliases. <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Any custom fields and values selected on company record. 	
Security roles	<p>Included in item copy</p> <p>The following configured at Setup > General > Security > Security Roles:</p> <p>The security role and all permissions assigned to the role</p> <p>Dependent items also copied</p> <p>None</p>	

Table 2: General Administration

Category	Copy Details	Replaces Existing?
Static text	<p>Included in item copy On-screen text in various applications which may be customized for your event.</p> <p>Dependent items also copied None</p>	

Table 3: Global Event Preferences

Category	Copy Details	Replaces Existing?
ActiveEvents Connect		
Analytics Account	<p>Included in item copy The following configured at Setup > General > Initial Setup > Event Analytics:</p> <ul style="list-style-type: none"> • Google Analytics Account ID • Site Catalyst Account ID <p>Dependent items also copied None</p> <p>Not copied</p> <ul style="list-style-type: none"> • Google Analytics Script • Site Catalyst preferences: <ul style="list-style-type: none"> • Abbreviated Event Name • Event Identifier for Order ID 	<p>YES If analytics IDs are found, replaces existing IDs.</p>
Call for Papers	<p>Included in item copy The following configured at Setup > Content > Call For Papers > General Settings:</p> <ul style="list-style-type: none"> • Allow session submissions • Allow demo submissions • Allow staff/speaker submissions • Login required (for Call for Participation site) • Enable session levels • Assign session submitter as owner • Submit real speakers • Automatically send confirmation email <p>The following configured at Setup > Exhibitor > Call for Demos:</p> <ul style="list-style-type: none"> • CFD active • CFD login required <p>Dependent items also copied None</p> <p>Not copied</p> <ul style="list-style-type: none"> • Active preference to turn on the Call for Participation site. • Profile Page selected at the CFP Simple Create Account Setup 	<p>YES If CFP preferences are found, replaces existing.</p>

Table 3: Global Event Preferences (continued)

Category	Copy Details	Replaces Existing?
Content & Scheduler	<p>Included in item copy</p> <p>The following settings configured at Setup > General > Email Messages > Predefined Emails:</p> <ul style="list-style-type: none"> • Send Email on Voting Committee Assignments • Send Email on Waiting List to Schedule • Send Speaker Email on Session Approval • Send Owner Email on Session Approval <p>Dependent items also copied</p> <p>None</p> <p>Not copied</p> <ul style="list-style-type: none"> • Log Email • Send Attendee Email After Registering • Send User Account Info Changed Email • PDF Generator URL 	<p>YES</p> <p>Replaces existing content-related email preferences.</p>
	<p>Included in item copy</p> <p>The following settings configured at Setup > General > Search Preferences > Session Search Prefs:</p> <ul style="list-style-type: none"> • Session search number of display results • Content flags available in search • Content fields available in search <p>Dependent items also copied</p> <p>Custom fields used to define the search preferences.</p> <p>Not copied</p> <p>If you have custom content flags and have configured those flags as available in a search, those flags and their associated search setting are not copied.</p>	<p>YES</p> <p>Replaces existing content-related search preferences.</p>
	<p>Included in item copy</p> <p>The following labels configured at Setup > Content > General > Field Labels:</p> <p>Abbreviation, Title, Abstract, Type, Level, Length, Comments, Status, Session Count, Capacity.</p> <p>Dependent items also copied</p> <p>None</p>	<p>YES</p> <p>If labels are found, replaces existing.</p>
	<p>Included in item copy</p> <p>The following setting configured at Setup > Content > General > Session Preferences:</p> <ul style="list-style-type: none"> • Default Number of Times Sessions are Offered <p>Dependent items also copied</p> <p>None</p>	<p>YES</p> <p>If default times session offered is found, replaces existing.</p>
	<p>Included in item copy</p> <p>The following configured at Setup > Content > Voting > Voting Search:</p> <ul style="list-style-type: none"> • Setting that defines statuses used in session voting search. <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Session statuses used to configure the search rule. 	<p>YES</p> <p>If voting search already configured, replaces existing.</p> <p>NO</p> <p>If session status with same code is found, the existing role remains.</p>

Table 3: Global Event Preferences (continued)

Category	Copy Details	Replaces Existing?
Content & Scheduler (continued)	<p>Included in item copy The following configured at Setup > Content > Speakers & Participants > Auto Role Assignment:</p> <ul style="list-style-type: none"> • Setting to define profile items (custom fields) that assign specific roles. • Setting to identify which role is assigned. <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Custom fields used in the rule. • Content roles assigned by the rule. 	<p>YES If auto role assignment rule already configured, replaces existing.</p> <p>NO If role with same code is found, the existing role remains.</p>
	<p>Included in item copy The following settings configured at Setup > General > Email Messages > Predefined Emails:</p> <ul style="list-style-type: none"> • Send Email on Voting Committee Assignments • Send Email on Waiting List to Schedule • Send Speaker Email on Session Approval • Send Owner Email on Session Approval <p>Dependent items also copied None</p> <p>Not copied</p> <ul style="list-style-type: none"> • Log Email • Send Attendee Email After Registering • Send User Account Info Changed Email • PDF Generator URL 	<p>YES Replaces existing content-related email preferences.</p>
	<p>Included in item copy All settings configured at Setup > Content > Schedule > Time Preferences including:</p> <ul style="list-style-type: none"> • Session Block Interval • Admin Scheduling Start Hour • Admin Scheduling End Hour • Public Scheduling Start Hour • Public Scheduling End Hour <p>Dependent items also copied None</p>	<p>YES Replaces existing time preferences.</p>
	<p>Included in item copy All the scheduling filter profile items (custom fields) configured at Setup > Content > Schedule > Scheduling Filters.</p> <p>Dependent items also copied Custom fields used to configure the scheduling filter / search.</p>	<p>YES If scheduling filters are already selected, replaces existing.</p>

Table 3: Global Event Preferences (continued)

Category	Copy Details	Replaces Existing?
Content & Scheduler (continued)	<p>Included in item copy All settings configured at Setup > Content > Catalog & Scheduler > General Prefs including:</p> <ul style="list-style-type: none"> • Run in Scheduler Mode • Show Rooms in SCPS • Show Speakers in SCPS • Show Speakers Photos on the Speaker Details page in SCPS • Show Suggested Sessions Tab in SCPS • Show Published Files on Scheduler • Show Published Files on Public Scheduler • Use SCPS Priorities when scheduling sessions • SCPS Show session-full icon on public scheduler • Show Session Level and Audience Tab in SCPS • Attendee Schedule Pad • Allowed minutes before no admittance to a session. This also allows sessions to be dropped. • SAC policy • Enable Waiting List • Waiting List Policy <p>Dependent items also copied None</p>	<p>YES If general Catalog & Scheduler preferences are found, replaces existing.</p>
	<p>Included in item copy All settings configured at Setup > Content > Catalog & Scheduler > My Interests Prefs including:</p> <ul style="list-style-type: none"> • Use Time Units • Minutes Per Unit • Max Units or Sessions • My Interests Limit Text • My Interests Full Text • Minimum My Interests Session Count • Minimum Scheduled Session Count • Use Minimum Scheduled Session Count (Otherwise use My Interests count) <p>Dependent items also copied None</p>	<p>YES If My Interests preferences are found, replaces existing.</p>
	<p>Included in item copy All settings configured at Setup > Content > Catalog & Scheduler > Survey Prefs including:</p> <ul style="list-style-type: none"> • Show Conference Surveys on Scheduler Home • Show Session Surveys on Scheduler Home • Show Session Survey Links on Catalog • Show Session Surveys for All Users • Show Session Surveys for Registered Users • Show Session Surveys for Attended Users <p>Dependent items also copied None</p>	
Exhibitor		

Table 3: Global Event Preferences (continued)

Category	Copy Details	Replaces Existing?
General		
Meetings		
Parent Event		
Registration & Hotel		
SAC		

Table 4: Registration module

Category	Copy Details	Replaces Existing?
Attendee type roll-ups	<p>Included in item copy The following configured at Setup > Users > General > Attendee Report Groups: The attendee type reporting groups (attendee type roll-ups).</p> <p>Dependent items also copied Any attendee types included in reporting groups.</p>	<p>NO If group or attendee type with same code is found, the existing group or type remains.</p>
Registration packages	<p>Included in item copy The following configured at Setup > Users > Reg Setup Wizard > Packages:</p> <ul style="list-style-type: none"> • General package data including name, code, description, package group, "Registered" status setting, quantity, price, cancellation fee. • Advanced package data including order maximum, order minimum, prerequisite items, excluded items, day pass setting. • Price points including discount type and cancellation fee. • Purchase profile value rule settings. (These are custom fields either auto-assigned to a user or which or user is prompted to select after choosing this package.) <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Registration package group • Any prerequisite registration package(s) • Any excluded registration package(s) • Custom fields and values associated with price points. • Custom fields and values associated with purchase profile value rules. (Does not copy those values that are not part of the rule.) <p>Not copied</p> <ul style="list-style-type: none"> • Session bookings. Session bookings are for a specific session time scheduled in a specific room. Rooms are different for each venue, and therefore are not copied from event to event. 	

Table 4: Registration module (continued)

Category	Copy Details	Replaces Existing?
Registration paths	<p>Included in item copy</p> <p>The following configured at Setup > Users > Reg Setup Wizard > Paths:</p> <ul style="list-style-type: none"> • General path data including name, code browser title, target audience setting, and language. • Registration catalog page setup. • Payment page setup • Hotel setup • Confirmation page setup <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Attendee type custom field or other custom field used to identify the target audience for the path • Custom field locations and associated custom fields for these pages in the path: <ul style="list-style-type: none"> • Contact Information (both returning and new user views) • User Profile pages 1 and 2 <p>NOTE: For registration paths, all custom fields included in the path are copied. These are not restricted to Global custom fields. If the custom field has a parent/child usage, the parent custom field and value are also included.</p> <ul style="list-style-type: none"> • Registration packages selected for the Registration Catalog page • Predefined emails selected for: <ul style="list-style-type: none"> • Hotel confirmation & cancellation • Registration confirmation & cancellation 	<p>YES</p> <p>If registration path with same code is found, replaces existing path.</p>

Table 5: Content module

Category	Copy Details	Replaces Existing?
Call for Papers (CFP) paths	<p>Included in item copy</p> <p>The following configured at Setup > Content > Call for Papers > General Settings > [path name]:</p> <ul style="list-style-type: none"> • General Call for Papers path settings including name, code, publish setting, field labels, abstract limit settings. • Setup for Speaker page including labels, display setting, and required settings. • Whether files can be uploaded through the path. • Step labels for each page in the path. <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Session types used to identify the types of sessions that may be submitted through the path • Content (session) roles used to identify the types of participants that may be submitted through the path • Custom field locations and assigned custom fields for these pages in the path: <ul style="list-style-type: none"> • Speaker • Session profile 	<p>YES</p> <p>If CFP path with same code is found, replaces existing path.</p>

Table 5: Content module (continued)

Category	Copy Details	Replaces Existing?
<p>Content roles</p>	<p>Included in item copy The following configured at Setup > Content > Speakers & Participants > Participant Roles:</p> <ul style="list-style-type: none"> • Name, description, code, and content category. • Settings to indicate whether role: <ul style="list-style-type: none"> • Can reject content tasks. • Is considered speaker. • Displays in SCPS. • Prevents double-booking. <p>Dependent items also copied None</p> <p>Not copied</p> <ul style="list-style-type: none"> • Registration code specified for the content role • Security role specified for the content role 	<p>NO If role with same code is found, the existing role remains.</p>
<p>Content tasks</p> <p>NOTE: If a task due date is specified in the Source event, it is copied. You will likely want to change the task due dates in the Destination event to match the dates required for the new event.</p>	<p>Included in item copy The following configured at Setup > Content > Content Tasks > Tasks:</p> <ul style="list-style-type: none"> • Task name, description, and due date • Task type (session, participant, or file) • Setting for page or URL that displays for this task • Settings to indicate whether: <ul style="list-style-type: none"> • All eligible approvers must complete task. • Comments are allowed or required. • Email is sent when task ready to complete • Mapping settings for the task <p>Dependent items also copied</p> <ul style="list-style-type: none"> • If the task displays a profile page, the custom field location for that page and its assigned custom fields. • Any parent task that must be completed before this task. • Session types to which the task is mapped. • Content roles to which the task is mapped. 	<p>YES If task with same task name is found, replaces existing task.</p> <p>NO If session types or content roles with same codes are found, the existing types and roles remain.</p>

Table 5: Content module (continued)

Category	Copy Details	Replaces Existing?
<p>Sessions</p> <p>NOTE: If the session already existed in the destination event and a copy overwrites some data, those changes are recorded in the session History.</p>	<p>Included in item copy</p> <p>The following configured at Content > Add New Session:</p> <ul style="list-style-type: none"> • Session ID, code, title, abstract, comments, creation date, times offered, capacity. • Settings for session type, technical level, status. <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Custom fields: <ul style="list-style-type: none"> • Copies only those fields marked as “Global”. • Copies only the profile value (response) selected for this session. • Session type and associated length in minutes • Session status • Technical level • Session files (including code, filename, size, type, URL) <p>Not copied</p> <ul style="list-style-type: none"> • Publish and lock settings. • History • Related sessions • Freeze file uploads setting for presentation files. • Session schedule <p>NOTE: The “submitted by” field is the username of the person that created the session; however, if no match is found in the destination event, then it will default to the user logged in doing the copying.</p>	<p>YES</p> <p>If session with same code is found, replaces existing session.</p> <p>NO</p> <p>If session type with same code is found, existing type remains.</p>
<p>Session types</p>	<p>Included in item copy</p> <p>The following configured at Setup > Content > General > Session Types:</p> <p>The type including any lengths set up for the type.</p> <p>Dependent items also copied</p> <p>None</p>	

Table 6: Exhibitor module

Category	Copy Details	Replaces Existing?
<p>Exhibitor registration path</p>	<p>Included in item copy</p> <p>The following configured at Setup > Exhibitors > ERC Path:</p> <ul style="list-style-type: none"> • Support header and support instructions • Settings for these pages in the path: <ul style="list-style-type: none"> • Create Account • Exhibitor Information • Payment • Invoice • Names and titles for each step in the path. <p>Dependent items also copied</p> <p>None</p>	

Table 6: Exhibitor module (continued)

Category	Copy Details	Replaces Existing?
Exhibitor roles	<p>Included in item copy The following configured at Setup > Exhibitors > Exhibitor Participants > Participant Roles:</p> <ul style="list-style-type: none"> • Name, code, and description. • Security role setting • Email selection • Owner assignable setting <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Security role • Email 	
Exhibitor tasks	<p>Included in item copy The following configured at Setup > Exhibitors > Exhibitor Tasks > Tasks:</p> <ul style="list-style-type: none"> • Task name, code, and description. • Task type • Due date • Setting for the page, URL, or file that displays for this task • Whether task is optional • Mapping settings for the task <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Task type. • If the task displays a profile page, the custom field location for that page and its assigned custom fields. • Exhibitor types to which the task is mapped. • Any custom field values to which the task is mapped (and the associated field). • Exhibitor roles to which the task is mapped. 	
Exhibitor packages	<p>Included in item copy The following configured at Setup > Exhibitor > Packages > Exhibitor Packages:</p> <ul style="list-style-type: none"> • General package data including name, description, package grouping, quantity, price, cancellation fee. • Price 1, price 2, and date price 2 will be effective. • Advanced package data including order limit, order minimum, prerequisite items, and excluded items. • Price points including discount type and cancellation fee. • Purchase profile value rule settings. (These are custom fields either auto-assigned to a user or which or user is prompted to select after choosing this package.) <p>Dependent items also copied</p> <ul style="list-style-type: none"> • Registration package group • Any prerequisite registration package(s) • Any excluded registration package(s) • Custom fields and values associated with price points. • Custom fields and values associated with purchase profile value rules. (Does not copy those values that are not part of the rule.) 	

How to track the source of copied data

The system generates a code for most items copied into an event. (Codes are not generated for data transferred by name, such as session length.)

The codes become a unique identifier for that item. They also may identify the source event. You can see these codes by looking in the record after the item has been copied. This section shows several examples.

This first example shows the code for a session record and explains how you can track the session submitter:

Figure 1: Copying a Session Record

Session Details

Created: 21 Sep, 2009 Last Modified: 26 Sep, 2009
Status: New Submitted By: Susan Garcia
Published: No
Session Locked: No

Proposed Speakers:

To modify custom fields [click here](#)

Session ID: * B: 205
External Code: wasp.sprshowwasp.b205
Title: * Hardware Essentials
Abstract: * Essential hardware needed for the system

The Submitted By field shows the name of the person who created the session in the source event *unless* this user does not have a record in the destination event. In that case, it shows the name of the person who used the Copy Event Wizard to copy this record.

This code identifies the deployment, event, and the session ID.

This second example illustrates the codes that identify attendee types.

Figure 2: Copying Attendee Types

The screenshot shows the 'Global Settings' window for a custom field. The field is named 'Attendee Type' with the code 'attendeeType'. The 'Type' dropdown is set to 'Select List'. The 'Display Value' is also 'Attendee Type'. There are checkboxes for 'Apply Display Value To All Pages', 'Is Required', and 'Global Field', all of which are unchecked. The 'Behavior' is set to 'Soft'. Below the settings is a 'List Items' table with three empty rows and a 'Show Advanced Options' link. At the bottom are 'Cancel' and 'Save' buttons.

In a new event, the Attendee Type custom field already exists, and is identified by this code.

No Attendee Types exist by default.

You can add attendee types by copying from another event. In this example, the Attendee Type field is copied from the Fall Showcase event.

The screenshot shows the 'Event Copy - From Fall Showcase to Southern Roadshow' window. It displays 'Copy Event Results' with a summary: 'Success: 6' and 'Failed: 0'. Below is a table with two columns: 'Item' and 'Status'.

Item	Status
Custom Fields	
Attendee Type	Success

This shows that 6 attendee types are copied when the Attendee Type custom field is copied.

Figure 3: Copying Attendee Types (continued)

Global Settings

ID 100

Type *

Name *

Code

Display Value *

Apply Display Value To All Pages

Is Required

Global Field

Behavior

List Items

General Attendee	<input type="text" value="show.spshow.generalAttendee"/>	Limit: 0	Specify Other: No	Field Id: 10000
Guest	<input type="text" value="show.spshow.guest"/>	Limit: 0	Specify Other: No	Field Id: 10001

Buttons: Cancel, Save

The code for the field does not change.

If you view Advanced Options for the list items (the values), you can see the code for each item that was copied.

List Items

General Attendee	<input type="text" value="show.spshow.generalAttendee"/>	Limit: 0	Specify Other: No	Field Id: 10000
Guest	<input type="text" value="show.spshow.guest"/>	Limit: 0	Specify Other: No	Field Id: 10001

The unique codes are on the actual attendee types. These codes identify the deployment and event, as well as the item.

Notice that even though the attendee type was copied from the Fall Showcase, the code shows that this field originally came from the Spring Showcase.

As shown above, the code lets you track the original source of an item, even if it has been copied several times. This may help with troubleshooting.

System Administrator security role

To copy data or settings from one event to another, you must be assigned the System Administrator security role in both the source event and the destination event. (The source event is the one you are copying from. The destination event is the one you are copying to.)

NOTE

The ability to copy events is controlled by the “event.copy” security permission. By default this permission is enabled only for the System Administrator security role. It is not recommended that other roles be granted this permission.

If you want to grant event copy permissions for other roles, please discuss it with your Business Analyst before you edit any security roles. This document assumes that only System Administrators have the “event.copy” permission.

If you have Full Access administration rights in your ActiveEvents Console, the system automatically assigns you as a System Administrator for an event the first time you access that event through the Console. If a Full Access administrator needs to copy from an event that he or she has not yet accessed, that person can be manually assigned the System Administrator role for the event (as explained in the table below).

For limited access ActiveEvents Console users, security roles must be assigned for each event separately. You can assign the System Administrator role to a user in one of two ways:

To assign an administrator from the Console	To assign an administrator in the Conference event
<ol style="list-style-type: none"> 1. In the Console, go to the Administrators list, and verify that the person already has a user account. If not, click Add New to create the account. 2. Go to the Event List, click the modify icon next to the event, and choose the Owners tab. 3. Do one of these options: <ul style="list-style-type: none"> • If the person is already listed as an owner, click the modify icon and make sure the person is assigned the System Administrator security role. • If the person is not already an owner, click Add New, choose the System Administrator security role, and save your changes. <p>For more information about the ActiveEvents Console, see the ActiveEvents Console guide.)</p>	<ol style="list-style-type: none"> 1. In the Admin Tool for the Conference event, do one of the following: <ul style="list-style-type: none"> • Search for and open the person’s user record. • If the person does not yet have a user account for this event, create one by going to Users > Add New User. 2. In the user record, choose Advanced > Security Roles, choose the System Administrator role, and save your changes.

Troubleshooting

Refer to this section if problems occur. If you still have questions or concerns, talk with your ActiveEvents Business Analyst.

I can't see the Copy Event Wizard menu

To see or use the Copy Event Wizard, your user account must be assigned a security role that has the "event.copy" permission. By default, only the System Administrator security role has that permission. It is not recommended that other roles be allowed to copy events. (For instructions on assigning the System Administrator role to a user, see [System Administrator security role](#) on page 23.)

In the Copy Event wizard, I can't see the event I want to copy

In the Copy Event Wizard, the Event Selection window lets you select the event from which you want to copy data or settings. The Event Selection window displays only these events:

- All events if you are a Full Access administrator in the ActiveEvents Console.
- Events for which you have been assigned an event owner.
- Events that are managed in the Console.

If you want to copy from an event that is not currently in the ActiveEvents Console, talk to your Business Analyst. You may be able to copy limited data from an older event if it was built using the Conference 5.2 code. This may require custom development.)

NOTE

Even if you have been assigned as an Owner of an event in the ActiveEvents Console, you will not be allowed to copy an event until your user account has been assigned the System Administrator role for that event. (For more information, see [System Administrator security role](#) on page 23.)

In the Copy Event wizard, I can't see the category of data that I want to copy

In the Copy Event Wizard, the Items to Copy window lets you select the category of data to copy. The Items to Copy window displays only the items that have been set up in the source event. In other words, you won't be given the option to copy items that don't exist.

For example, if the "copy from" event does not have any Call for Papers paths already configured, the Items to Copy window will not display the "CFP Paths" category.

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This document is compatible with ActiveEvents Conference 6.2 released in November 2010. Information in this document may also be compatible with later versions.

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