

Copying a project to another sub portal

Ester Andersson - 2024-07-29 - Tips & Tricks

1. Go to the client you wish to copy a project from
2. Go to the project you wish to copy
3. Click on the triangle on the right-hand side of the "Copy" button and click "Copy to another client"
4. If the course has content that is from the local client library you will be asked to confirm that those will be copied to the other client as well.
5. Select which client you wish to copy the template to
6. All done!

The screenshot shows the Learnifier dashboard for a project titled "Customer Success Playbook". The dashboard includes a navigation bar with options like Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below the navigation bar, there are tabs for OVERVIEW, PARTICIPANTS, WAITLIST, COURSE PAGE, EVENTS, ASSIGNMENTS, DETAILS, COMMUNICATIONS, REPORTS, and SETTINGS. The main content area displays the project title (ADMIN) and course title (LEARNER) as "Customer Success Playbook". It also shows the creation and update dates: "Created: Demo Ester Friday, July 1, 2022" and "Updated: Demo Ester Tuesday, June 20, 2023". There are buttons for "Edit course", "Preview", "Delete", and "Copy". A dropdown menu is open from the "Copy" button, showing options "Create template" and "Copy to another client", with a green arrow pointing to the latter. Below this, there is a "1 participants" section with a "STATUS Ongoing" indicator. The participants section includes three circular progress indicators: "1" (Not Started), "1" (On Track), and a green checkmark (Completed). A table below shows the status of participants: Not Started (0), In Progress (1), Completed (0), On Track (1), Overdue (0), Not Invited (0), Bounce Backs (0), and Project Errors (0). To the right, there is an "Awards" section with an "Attach" button and a table with columns "NAME", "EXPIRES", and "TYPE". The table contains one row: "Introduction to Learnifier", "6 months", and "Certificate". Below the awards section is a "Next Course" section with an "Add Next Course" button.