

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 creator (Demo Ester) and the update date (Tuesday, June 20, 2023). A "Copy" button is visible, with a dropdown menu that includes "Create template" and "Copy to another client", which is highlighted by a green arrow. Below the project details, there is a section for "1 participants" with a status of "Ongoing". This section includes three circular progress indicators: "1" Not Started, "1" On Track, and a green checkmark. A table of awards is also visible, with columns for NAME, EXPIRES, and TYPE. The table lists "Introduction to Learnifier" with an expiration of "6 months" and a type of "Certificate". A "Next Course" section is also present, with an "Add Next Course" button.