

# Cloning a Project

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## Purpose

This document walks through cloning an existing project to create a new one. This scenario should only be used to create projects with Project Type = Internal only. Examples:

- Employee Onboarding projects created from the onboarding template
- Creating other internal projects based on an existing internal project
  - Projects used for Scheduling
  - Projects used for non-customer-facing project tasks and time tracking

There are several project types that Project Managers or Schedulers should NEVER clone:

- Customer Projects for new sales opportunities closed/won
  - Projects are created from the opportunity directly
- Rework for closed projects
  - Requires approval from the Director of Professional Services and should only be used if there is no additional time/product to be quoted
- Creating Project Templates
  - This is done via Template Hub only

These project types require review for appropriate scope and billable vs nonbillable time and will be assigned to PMs and Schedulers by the senior leader of PMO.

It is important to note that when a project is cloned, the Chatter information on tasks is NOT cloned and the status of all tasks will be duplicated.

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## Cloning a Project

Follow the steps below to clone a project:

1. From the upper right corner of the project screen, click the drop-down and select 'Clone with Task'

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2. A new project will be created with the same project name plus 'Copy' in front
  3. Change the project name to describe the purpose of the new project accurately
  4. Remove/Edit any tasks as necessary
    - a. Delete any unwanted tasks
    - b. Tasks with 'List' = Completed
      - i. In the Completed Task Information section of the task uncheck the 'Completed' box and remove the 'Actual Completion Date' date
      - ii. The balance of the completion information will be updated automatically
    - c. Update the 'List' field on all tasks to 'Needs Scheduling'
  5. Check the 'Template' field on the project for all projects that are not customer projects

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## Error When Cloning a Project

There is a bug in the cloning process for any project where time has been posted against a task. It prevents the project from being cloned. To resolve:

1. Create a task list view where "Actual Time Completed" >0.
2. Take a screenshot of the list showing the 'Resource Role' field for these records
3. Change the 'Resource Role' on any task with time completed to 'None'
4. Clone the project
5. On the original project re-enter the 'Resource Role' to its original entry in the screenshot from step 2

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