



Copying Project Tasks in Clarity

Objective

This instructional document is targeted to teach and guide users (PMs) how to copy tasks from one project to another.

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Introductions

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As of version 16.1.2, we are now able to copy tasks from one project to another within Clarity.

Guidelines

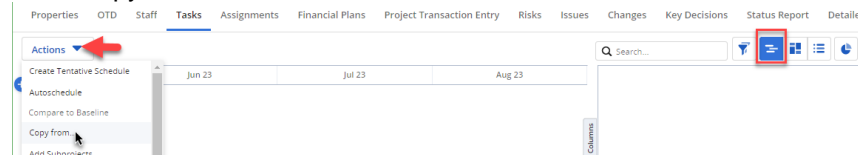
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- Must be in the Timeline view on the destination Project's Tasks tab.
- If copying tasks with assignments, must have resource management rights (which PMs do).
- To Dos on Tasks come with them.
- Ensure Task IDs not present in view if copying the same set multiple times.

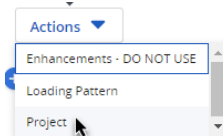
Procedure

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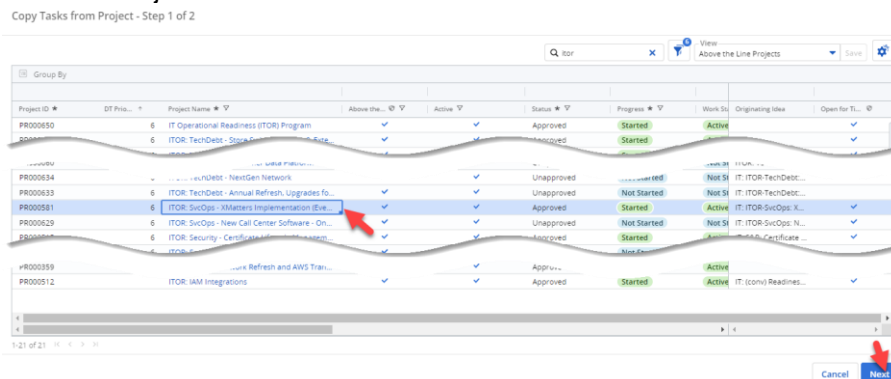
1) Click "Actions", then select "Copy from..."



2) Select "Project"

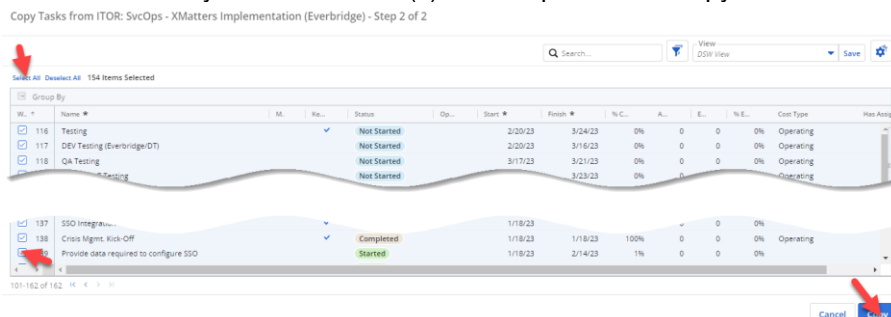


3) Locate and select the source Project. Click Next.



TIP: If you're not seeing it, review the filters that are in place.

4) Using the Select All and or individually Select the Task(s) to be copied. Click Copy



NOTES:

- Assignments are only brought over if the Staff member exists on the destination Project
- All Statuses are set to Not Started and % Complete set to 0

5) Repeat steps 1-4 if there are tasks from any other projects you would like to copy.

6) Review, revise and manage each of your new tasks as appropriate