Copy to New Project

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Project Management Context

With the Copy to New Project feature, a project's Actual Project Manager and users with the BrightWork PMO Manager security role have a fast way to create a new project by copying information from an existing project rather than needing to start a project from scratch. Copied projects adhere to the original project's security conditions, maintain the same Owning Business Unit, and the same Team Member list (assigned work). Dates will update to {Today} with dependencies offset.

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Items Copied to the New Project from the Original Project

- Charter
  - Regarding the Date Due field in the Charter tab, the solution gets the difference in Days between the source project Start Date and Date Due and add that to UTCNow to set the Date Due in the new project.
- Tasks
- Issues
- Risks
- Related Tasks in Issues, Risks, and Costs
- Actions
- Costs
- All Team Members
- All assignments with relative due dates that come from the parent record (Issues, Risks, Actions, Costs, Task Assignees)
- Project Calendar
- Project Settings

Items Not Copied to the New Project from the Original Project

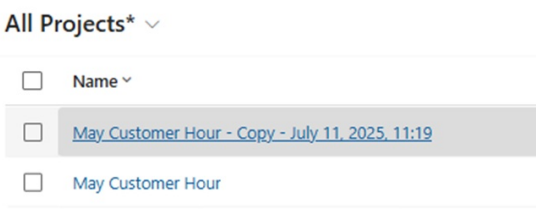
- Documents
- Status and Status Reports
- Project Exception Days
- Lessons Learned
- Actions from Lessons Learned

- Custom columns
    - Custom project columns need to be added to the Copy Custom Project to Project child flow, which is called by the Copy to New Project flow. If you need more information, please contact your Customer Success Partner.

How To Use Copy to New Project

> **Note**
> - For release 2026-3 and newer: When using Copy to New Project, ensure that the original project's name does not exceed 215 characters so as to avoid exceeding the name field's 255 character limit after the copy process automatically adds its additional characters to the new project's name. Otherwise, the process will fail
> - Fore release 2026-2 and older: When using Copy to New Project, ensure that the original project's name does not exceed 60 characters so as to avoid exceeding the name field's 100 character limit after the copy process automatically adds its additional characters to the new project's name. Otherwise, the process will fail.

1. In the source project's **Charter** tab, click the link in the **Settings and Actions** field.
2. Click the **Actions** tab.
3. In the Copy to New Project field, slide the selector to **Yes**.
4. The new project is created and named as a copy.



Adjusted Dates

If a source item (e.g. Action) has a date in the Due Date type column, the Due Date on the new items will be UTC Now plus the difference in days between the Due Date on the source item and the Current Start Date on the source project.

The Current Start and Curren Finish dates on Project Tasks will also be populated. This means that the project will have a Current Start and Current Finish without having to be opened.

To work out the Current Start and Current Finish dates for the task in the new project, the solution works out the difference in days between the source task start and end dates and the project start date and add that to {Today}.

The same applies to Project Team Members; however, these dates may adjust slightly to take account of Non-Working Days.

Copying a Project with Tasks Inherited from a Content Template

Before copying a project that was built from a template associated with a Content Template containing tasks, you must load its Gantt tab to update the tasks in order to avoid copy errors.

Cost Data

Costs will increase in Programs and Portfolios if the copied project had cost data.

Wait up to an hour for calculated fields in the Costs tab of the copied project to be updated. Alternatively, you can manually refresh the cost calculation to see the updates faster; this applies to Portfolio and Programs calculated Costs field rollups as well.