XMPie PE Training Series

Transcript for: Duplicating a project or template in Circle

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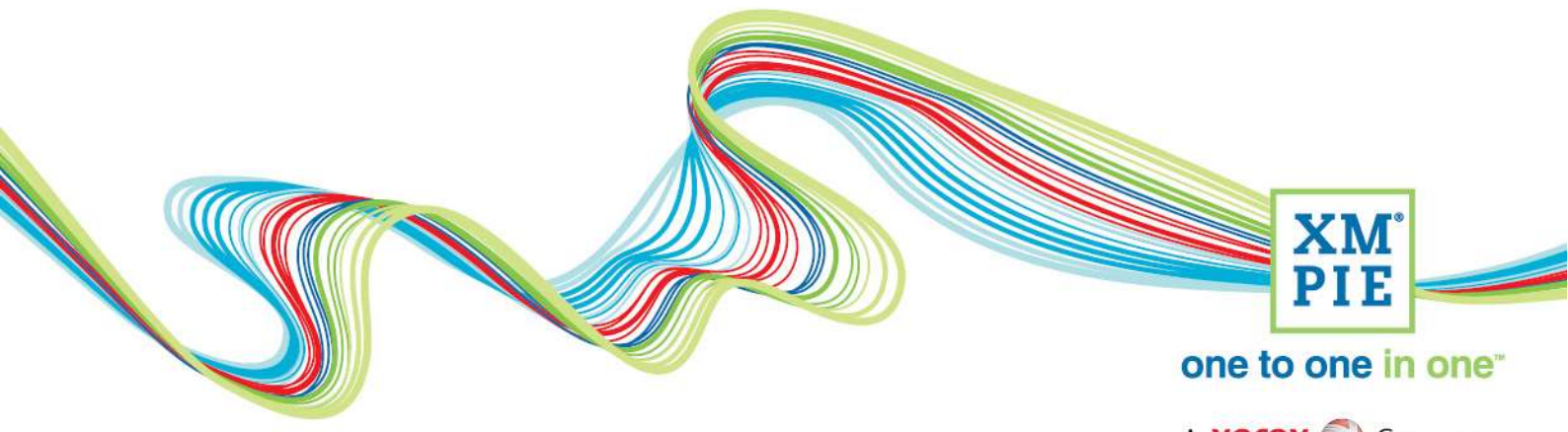

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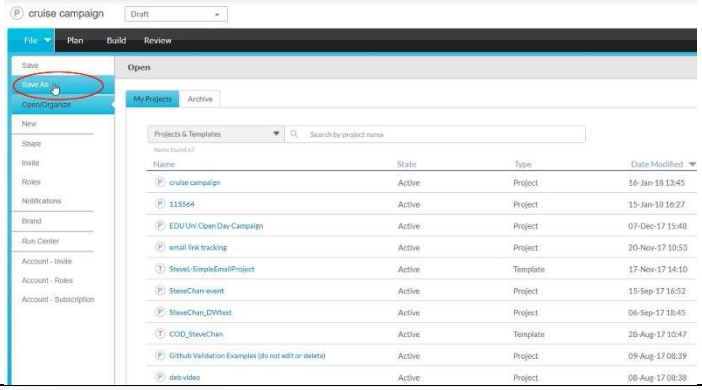
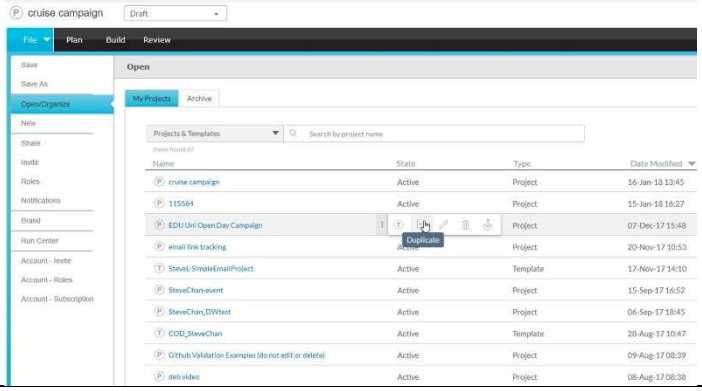
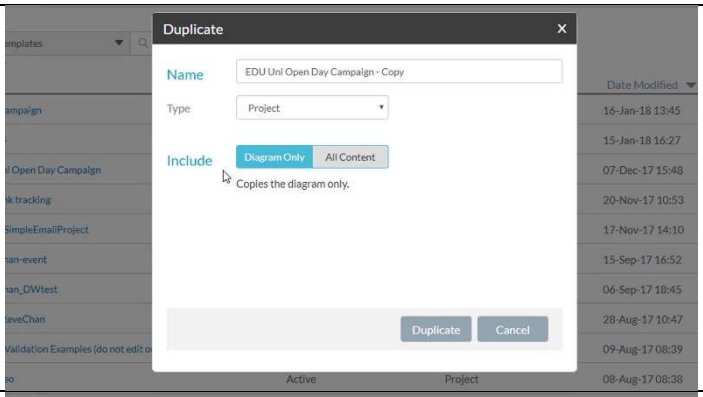
Voice over script	Thumbnail
Hi! Welcome to XMPie PersonalEffect Cross Media.	
From time to time, it may be necessary to copy or duplicate a Circle project or template. For example, if you want to make a backup before implementing a change; or if you want to repeat a successful campaign for a different customer or promotion.	
There are two ways to find the option to duplicate a project. If the project is open, you can select Save as from the File menu. In this case, you will be duplicating the project from disk – meaning that any changes you have made in the open project since your last save will not be included in the new copy.	
Alternatively, if you wish to copy a project without opening it, you can use the Open/organise menu and locate the duplicate icon on the row of the project you want to copy. The duplicate icon will appear on Projects, Templates and Flow patterns, but not on Sketches or Instances.	

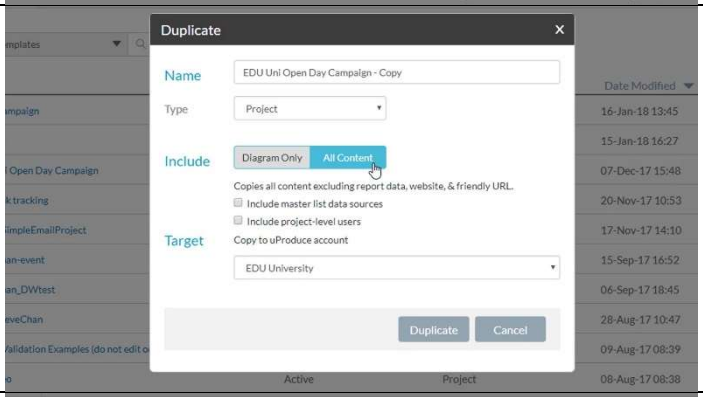
When you choose to copy a project, you will see this dialog. You can choose to copy the flow Diagram Only. In this case, if the source project is connected to uProduce, any files or data in the uProduce server will not be copied. This allows you to use the flow of the campaign, and to setup totally new document designs, logic and data.



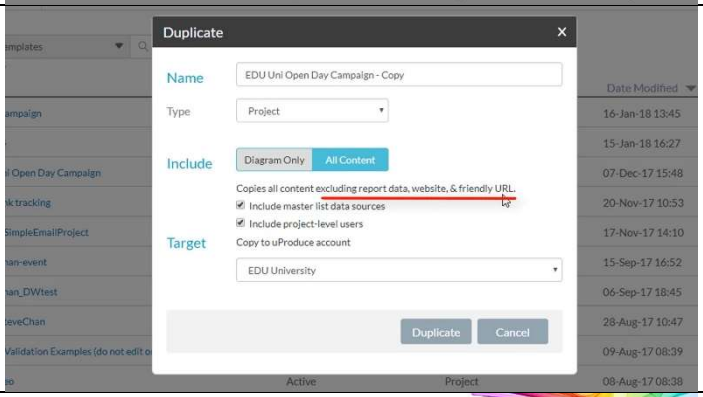
The All Content option offers to also copy the project documents and resources on the uProduce server.

Optionally, you can select to also copy the master list data sources and project-level Circle users.

You can even select to create the new copy in a different uProduce account if necessary.



Note that the duplicate function will not copy sample recipients or report data. (It copies the Marketing Console reports, but not the tracked event data from the source project.) And, the website and friendly URLs are also not copied, but it is a simple matter to create the managed website, copy over the files and configure a different friendly URL.



This table describes what is copied by the duplicate function.

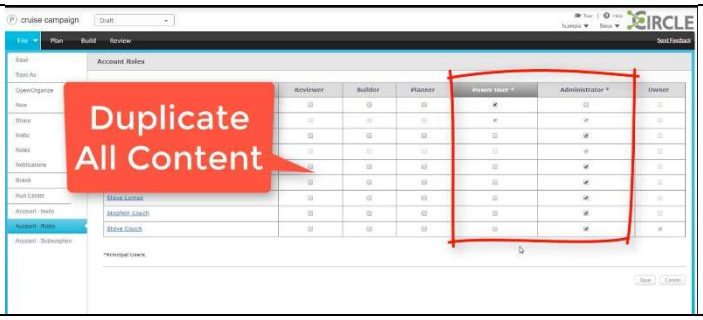
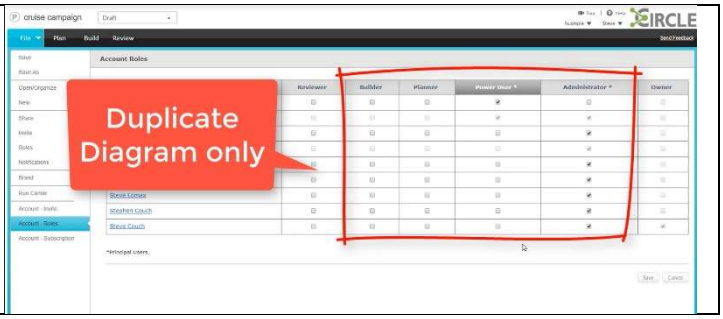
Duplicated objects

	Diagram only	All content
uProduce campaign		
Plan	✗	✓
Fonts	✗	✓
Assets	✗	✓
Resources	✗	✓
Documents	✗	✓
Data Sources (in Master list)	✗	○ (if selected)
Ports	✗	○ (if selected)
Circle components		
Diagram	✗	✓
Tracked ADOR (Plan section)	✗	✓
Touchpoint ID	✗	✓
Event Filters	✗	✓
Sample recipients	✗	✗
Managed Website and FURL	✗	✗
Web TP settings	✗	✓
TP Production settings	✗	✓
Email delivery provider	✗	✓
Scheduling settings on TPs	✗	✓
Project Parameters	✗	✓

	Diagram only	All content
Touchpoint icons		
Information	✓	✓
Reports	✗	✓
Comments	✗	✗
Integration	✓	✓
Mockup	✓	✓
Other		
Project-level Roles	✗	○ (if selected)
Notifications	✗	✓
Circle branding	✓	✓
Production data		
Last run production	✗	✗
Marketing Console		
MC report definitions	✗	✓
MC data	✗	✗

Only users with Circle subscription level permissions can access the duplicate feature.

Only users with Power User or Administrator can use the All Content option.



Users with Planner, Builder, Power User or Administrator can use the Diagram only option.