

Hi. Welcome to Circle.

In this video, I will explain about Circle templates and instances, and explain the different project types and states that are available in Circle.

The project templates and instances feature is only available for Circle Business Edition customers who have PersonalEffect v9.0.1 or later.

A template is a project which is intended for duplication.

Using templates, you can create standard, off-the-shelf projects that are ready for duplication and fast implementation.

When duplicating a template, the resulting project is called an instance.

Each instance is a fully functional, independent project that can be fine-tuned.

Let's create a new project and look at the different project types and states that the project enters throughout its lifecycle.

When you create a new project, you will see this "P" icon indicating that you are working on a Circle Project.

After you save, you can see your project is in the "Sketch" state. This means that your project is not linked to a uProduce server.

If I go to the Build tab, and connect the project to my uProduce server, it is now seen in the "Active" state.

Now, you would normally create the documents for your Touchpoints.

I'll skip over this, but there are other videos in this series which show how to create email, print and web documents.

Now the project is completed, I can set the project to Live mode so that any scheduling and automation will run.

In the open dialog, the project status is now "Active – Live".

If this is a common project that you need to setup frequently, you can convert the project to a template.

From the File tab, select Open/Organize. Identify your project and select the T icon here. Confirm the change to template.

Notice that the icon changes to "T" to indicate that this is a template.

And the type is now seen as Template.

Also, notice that the status dropdown changes from "Live" to "Ready" meaning that it is ready to duplicate or create instances.

In Circle, you can create a new instance of the template by clicking "Instances", and clicking to create a "New instance".

You set a unique instance name which is used both to identify the instance in Circle, as well as used in the URL of personalized websites to identify the instance in the template's shared website.

You can see the "I" icon indicating that I am now working on this instance of the project.

When you create a new instance from your template, all of the components are copied excluding the following:

The same website is shared by the template and all of its instances.

Any website changes will affect the template and all instances of that template.

There is also a limitation that the Friendly URL is the same for all instances and cannot be changed once an instance has been created.

Any data source that is not used in the Master list is not copied to the new instance.

Also, since the template project's master list data source is copied to each new instance, it should include only sample data that can be copied without violating recipient privacy.

The comments sent by users when developing and testing the template are not copied to the new instances.

Back in the open dialog, if I click the link next to the "T" icon, I will be editing the original Template, and any changes I make will appear in any new instances created after I save the template.

If I click on the link next to the "I" icon, a new tab appears and I can see the list of all the instances of this template.

Clicking on an instance, will open that individual instance for editing.

The use of Project Instances is made even more convenient with Project Parameters which are used to set values that are easily changed on each instance – for example an event registration project could use parameters to set an Event date and RSVP date that are used for scheduling and automating Touchpoint production.

After creating a new instance, simply update the project parameters and you're ready to launch!