Import/Export Project and Templates from Back-Office

Contents

This article describes how to import and export and projects and templates in the Collaboard Back-Office.

This feature is useful if you want:
- Import in your system the Templates that are present in the Collaboard public environment
- If in your self-hosted environment you have more than one installation (for example a testing and a production environment) and you want exchange projects between the 2 installations

Importing and Exporting Projects from Back-Office

Exporting Projects from the Back-Office

Under the **Projects tab** in the Back-Office users can access all the existing projects present on any given environment.

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✏ Products

✏ **Projects**

✏ Project tiles
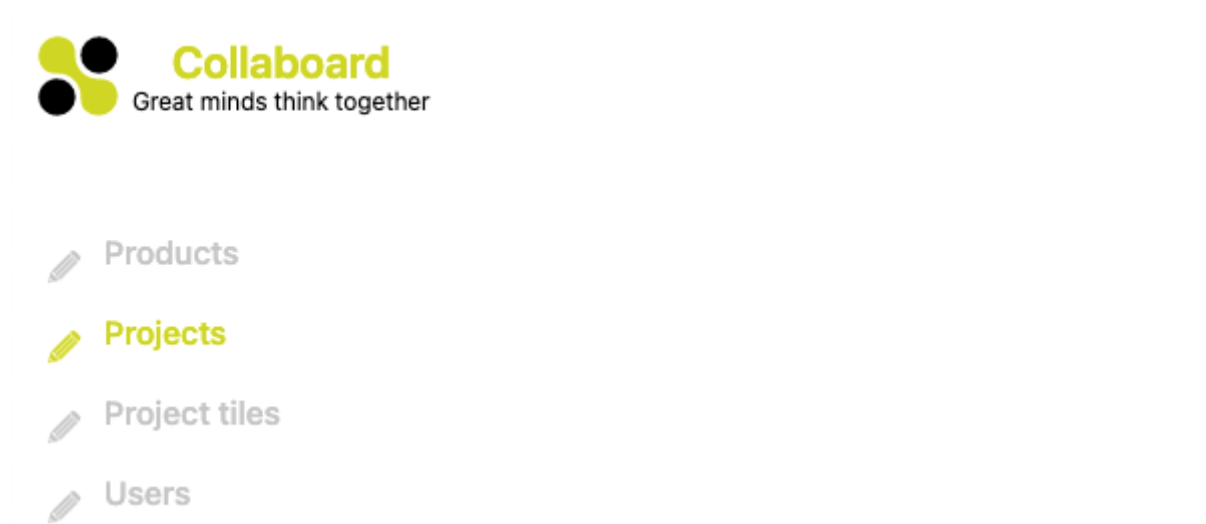
✏ Users

Users currently have **2 available options** to search for existing projects in the Back-Office:

1. Searching for the projects belonging to a specific user in the Search projects of user field.

ID	Name	Owner	Creation date	Is licensed	Is deleted
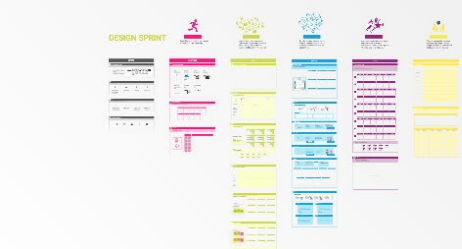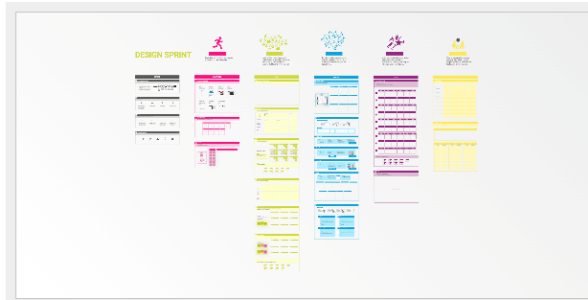
Search projects of user: username@mail.com

Filter by project name: Project name

Import   Import project batch   Export project batch

10 per page ⌄

Clicking on the **Pencil** icon will open the project's details.

Clicking on the **Export** button will trigger the project export and the user will receive the project export link via an email sent to the user's email address which was used to register the account.

2. Searching for a specific project by inputting the Project Name in the Filter by project name field.

Clicking on the **Pencil** icon will open the project's details.
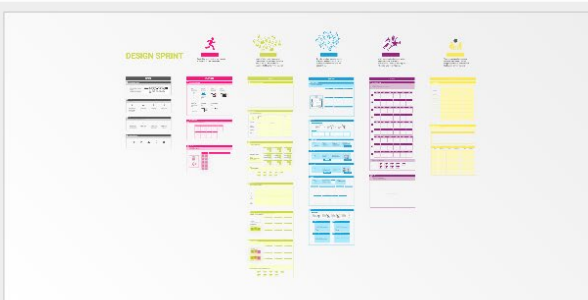
Clicking on the **Export** button will trigger the project export.

Once the **Export** process is finalized the user will receive an email confirming that the project has been successfully exported and will contain the project export link.

Project Exported

Project **3496** export **succeeded**

You can use the following URL to download the exported project. The link will be valid for 14400 minutes.

https://az01a000ssts0001.blob.core.windows.net/export/export-3496-109-20220218072637586.zip?sv=2019-07-07&sr=b&sig=mZjwrWXSc%2F5SQ0HCuX1I1unR%2B8Ov97Po7ysbxoRruR4%3D&se=2022-02-28T07%3A26%3A39Z&sp=r

Download exported project

If you have trouble logging in to Collaboard, please contact our support: **support@collaboard.app**.

Exporting Projects Batch from the Back-Office

The user must navigate to the **Projects** and click on the **Export project batch** button.

This will open the **Export Project Batch** modal

The user must populate the **Project IDs** field with valid project IDs separated by commas. The **Project IDs** can be seen when searching for the projects of a specific user or when searching for a specific project.
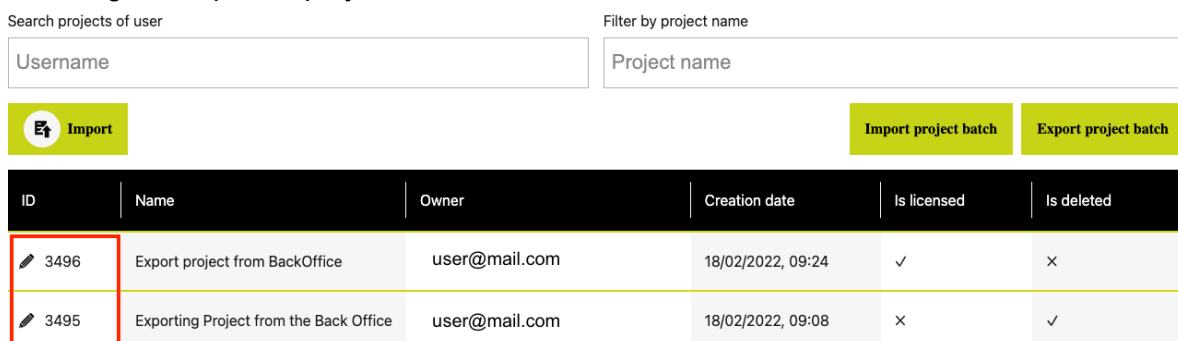
Once the user clicks on the **Export Project Batch** button the export process will be triggered and the user will receive an email containing the batch export URL and a confirmation message that the export process has been successfully completed.

Project Exported

Project **batch b755303d-a428-4545-983f-ba6123f1a9ca** export **succeeded, 2 projects exported**

You can use the following URL to download the exported project. The link will be valid for 14400 minutes.

https://az01a000ssts0001.blob.core.windows.net/export/export-batch-b755303d-a428-4545-983f-ba6123f1a9ca-20220218085330181.json?sv=2019-07-07&sr=b&sig=4rgWheLCxz1OL9JgCnhxGdEETQUjcu%2BzqTs69dwl7DE%3D&se=2022-02-28T08%3A53%3A30Z&sp=r

Download exported project

Importing Projects in the Back-Office

Users must navigate to the **Projects** tab in the Back-Office.

Users must click on the **Import** button located underneath the Username field

This will open the **Import Project** modal.

Users must fill in the required fields (*) to complete the **Import** process as follows:

- The **Project URL** field must contain the project export link that the user has received via email once the export process has been completed;
- The **Template ID** field must be left on the default **0** to ensure that the project is imported under the correct category;
- The **Project Owner** field must contain the name email address of a valid user account that will receive the project;
- The **Password** field is optional;

Once the **Import** process has been completed, the user will receive an email confirmation that the Project has been successfully imported.

Project Imported

Project **3497** import **succeeded**

If you have trouble logging in to Collaboard, please contact our support: **support@collaboard.app**.

Best regards,
Collaboard team

Importing Project Batch in the Back-Office

The user must navigate to the **Projects** and click on the **Import project batch** button

Search projects of user
> Username

Filter by project name
> Project name

Import   **Import project batch**   **Export project batch**

This will open the **Import Project Batch** modal.

Users must fill in the required fields (*) to complete the **Import** process as follows:
- The **Project Owner** field must contain the name email address of a valid user account that will receive the project;
- The **Template ID** field must be left on the default **0** to ensure that the projects are imported under the correct category (as projects);
- The **Password** field is optional;
- **Upload JSON file** - the user must upload the JSON file containing the information of the project batch;

Obtaining JSON File

In order to obtain the JSOn file required for a batch import, the user must click on the batch export link received via email to open the link, right-click on the page and select the **Save As** option.

```
[
  {
    "ProjectId": 3497,
    "Description": "Export project from BackOffice",
    "ExportFileUrl": "https://az01a000ssts0001.blob.core.windows
28T08%3A40%3A27Z&sp=r",
    "Success": true
  },
  {
    "ProjectId": 3490,
    "Description": "Regres
    "ExportFileUrl": "http                                              ows
28T08%3A53%3A29Z&sp=r",
    "Success": true
  }
]
```
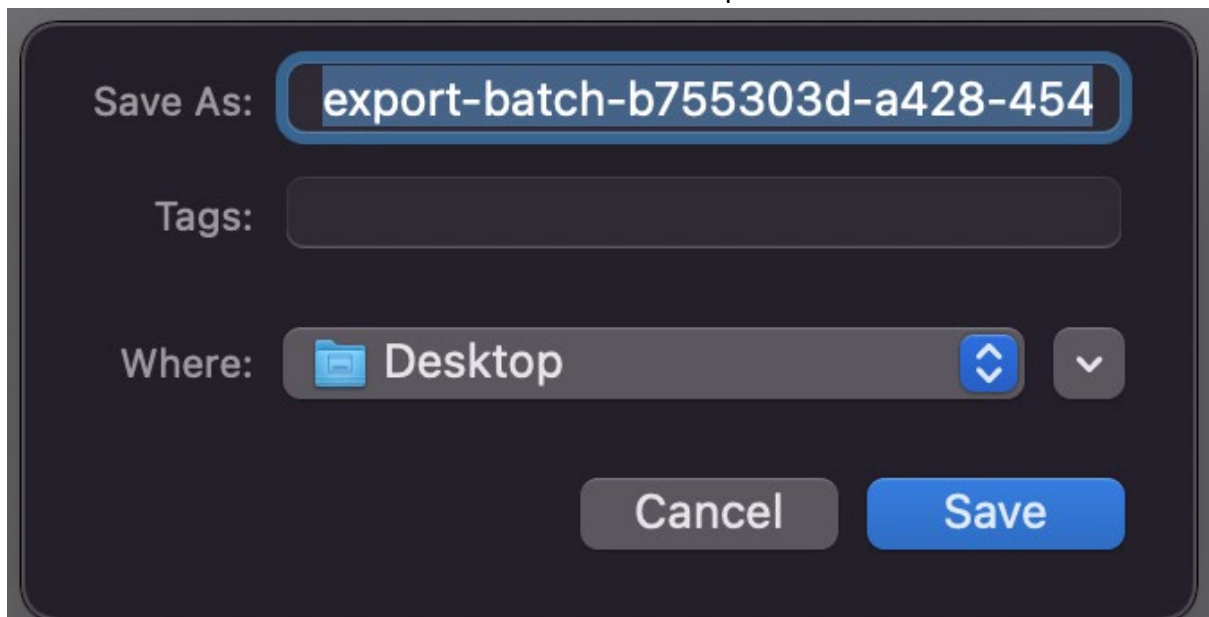
Back
Forward
Reload
Save As...
Print...
Cast...
Create QR code for this page
Translate to English
Activate the mobile view on this page
LastPass
View Page Source
Inspect
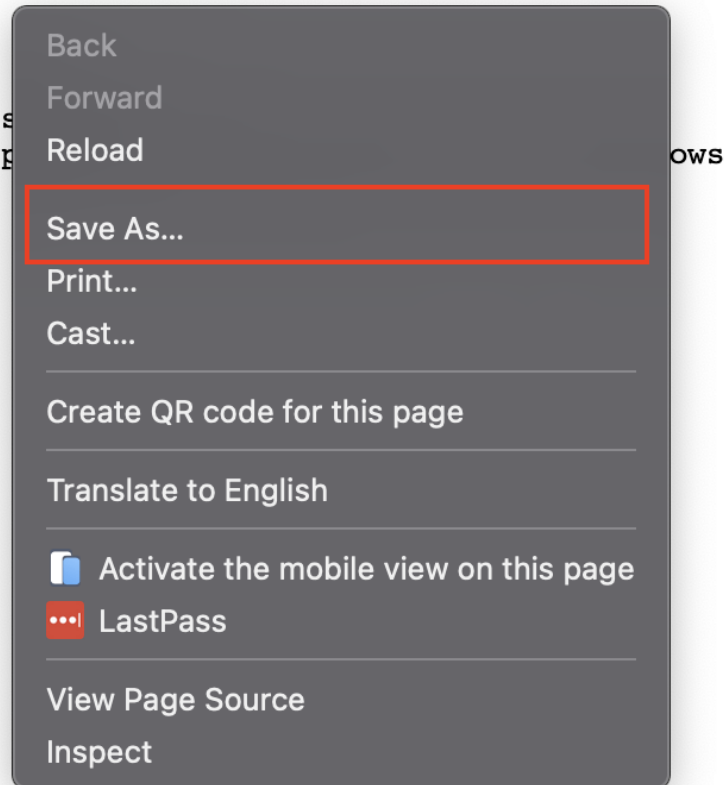
The user then has to save to JSON file to the local computer.

Save As: export-batch-b755303d-a428-454

Tags:

Where: Desktop

Cancel   Save

Once the Batch Import has been successfully completed the user will be notified via email.

Project Imported

Project **batch 0d68f755-ee14-4418-aafc-d7e609f0db0e** import **succeeded, 2 projects imported**

If you have trouble logging in to Collaboard, please contact our support: **support@collaboard.app**.
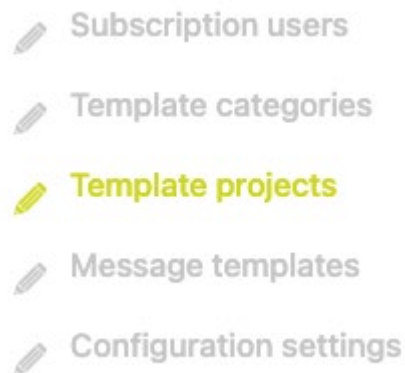
Best regards,
Collaboard team

Importing and Exporting Templates from the Collaboard Back-Office

This article describes how to export and import templates in the Collaboard Back-Office.

Exporting Templates from the Back-Office

Under the **Template projects tab** in the Back-Office users can access all the existing templates present on any given environment.

On this tab the user will see all the existing templates on the given environment.

Select language

Project ID	Description	Extended description	Last update	More info	
✏ 3	test1	test	14/09/2021, 14:24		🗑
✏ 89	Sticky Notes Template	anfnafoafa	04/06/2021, 11:46		🗑
✏ 91	Sticky Notes Templates	Test sticky notes template	04/06/2021, 11:51		🗑
✏ 92	Test	test	04/06/2021, 13:12		🗑
✏ 93	Test	Test	04/06/2021, 13:20		🗑
✏ 94	Test	test	07/06/2021, 16:54		🗑
✏ 96	test thumbnail	test thumbnail	07/06/2021, 17:03		🗑
✏ 98	1 sticky	1 sticky	07/06/2021, 17:05		🗑
✏ 99	stickies	stickies	07/06/2021, 17:06		🗑
✏ 101	stickies	stickies	07/06/2021, 17:17		🗑

⟨ Previous　**1**　2　3　4　5　Next ❯　10 per page ⌄

Clicking on the **Pencil** icon will open the template's details, where the user can see all the information related to the existing template such as:

- **Project ID** - the unique identification number for the template
- **Category** - the category which the template is part of
- **Description** - the templates description

- **Extended Description** - a more detailed description of the template
- **Zoom Factor** - the zoom level of the template
- **More Info Url**

Select language

English

Project ID	Description	Extended description	Last update	More info
✏️ 3	test1	test	14/09/2021, 14:24	

Project Id

3

Category

test1

Description

test1

Extended description *

test

Zoom factor *

1

More info Url

Cancel | Save

Edit template project | Export

Clicking on the **Export** button will trigger the export of the template.

Project ID	Description	Extended description	Last update	More info
✏️ 3	test1	test	14/09/2021, 14:24	

Project Id

3

Category

test1

Description

test1

Extended description *

test

Zoom factor *

1

More info Url

Cancel | Save

Edit template project | Export

Project Exported

Project **3** export **succeeded**

You can use the following URL to download the exported project. The link will be valid for 14400 minutes.

https://az01a000ssts0001.blob.core.windows.net/export/export-3-110-20220218081039815.zip?sv=2019-07-07&sr=b&sig=fAJmStoWsuqHqPrOeSYbCQD9mZXtR%2FAhBfki3pi1%2BoQ%3D&se=2022-02-28T08%3A10%3A55Z&sp=r

Download exported project

If you have trouble logging in to Collaboard, please contact our support: **support@collaboard.app**.

Exporting Templates as a batch from the Back-Office

The user must navigate to the **Projects** and click on the **Export project batch** button.

This will open the **Export Project Batch** modal

The user must populate the **Project IDs** field with valid template IDs separated by commas. The **Template IDs** can be seen in the **Template projects** tab.

Once the user clicks on the **Export Project Batch** button the export process will be triggered and the user will receive an email containing the batch export URL and a confirmation message that the export process has been successfully completed.

Importing Templates in the Back-Office

Users must navigate to the **Projects** tab in the Back-Office.

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Products

Projects

Project tiles

Users

Users must click on the **Import** button located underneath the Username field

Search projects of user
Username

Filter by project name
Project name

Import

Import project batch   Export project batch

This will open the **Import Project** modal.

Import Project ✕

Project URL *

Template ID (0 = import as project) *

0

Project Owner *

Password

Import

Users must fill in the required fields (*) to complete the **template Import** process as follows:

- The **Project URL** field must contain the project export link that the user has received via email once the export process has been completed;
- The **Template ID** field must contain the correct **Category ID** representing the category in which the Template will be imported;
- The **Project Owner** field must contain the name email address of a valid user account that will receive the project;
- The **Password** field is optional;

The user can see the existing **Template Categories** by navigating to the **Template Categories tab.**

The user must input the correct **Category ID** in the **Template ID** field of the **Import Project** Modal in order to finalize the Template Import process.

Once the **Import** process has been completed, the user will receive an email confirmation that the Project has been successfully imported.

Project Imported

Project **3497** import **succeeded**

If you have trouble logging in to Collaboard, please contact our support: **support@collaboard.app**.

Best regards,
Collaboard team

Importing Templates Batch in the Back-Office

The user must navigate to the **Projects** and click on the **Import project batch** button

Search projects of user	Filter by project name
Username	Project name

Import   **Import project batch**   **Export project batch**

This will open the **Import Project Batch** modal.

Import Project Batch　　　✕

Project Owner　　　　　　　　　　　　　　　　　　＊

Template ID (0 = import as project)　＊　Password

0

Browse files

or

Drag JSON file here

Import project batch

Users must fill in the required fields (*) to complete the **Import** process as follows:
- The **Project Owner** field must contain the name email address of a valid user account that will receive the project;
- The **Template ID** field must contain the correct **Category ID** representing the category in which the Template will be imported;
- The **Password** field is optional;
- **Upload JSON file** - the user must upload the JSON file containing the information of the project batch;

Once the Batch Import has been completed the user will be notified via email.

Project Imported

Project **batch 0d68f755-ee14-4418-aafc-d7e609f0db0e** import **succeeded, 2 projects imported**

If you have trouble logging in to Collaboard, please contact our support: **support@collaboard.app**.

Best regards,
Collaboard team

Importing Template Batches from the PROD environment in ON-PREM environments

If the ON-PREM customer has direct internet access to the file URL specified in the JSON files, the customer can follow the Import Template steps mentioned above.

If the ON-PREM customer does NOT have direct internet access to the file URL specified in the JSON files, then in order for ON-PREM customers to be able to install the templates available on the PROD environment the following steps must be done:
- The files must be downloaded from the outside storage location;
- The files must be uploaded to an internal location where all of the users of the environment have access;
- Each JSON file must be updated with the NEW URL LINK to the location in the local network storage:

```
{
  "ProjectId": 53412,
  "Description": "Titel Blue",
  "ExportFileUrl": "https://az01a000psta0002.blob.co
  "Success": true
},
```

- The new link that will be updated in the JSON files MUST be either an HTTP or HTTPS link;

Once the steps listed above have been followed, the same Template Batch Import process listed above can be followed.