

Genii Analytics | Copy Template | AQA

V1. January 2021

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Scope

The purpose of this feature is to allow our staff to reuse/repurpose campaign configurations across various sites.

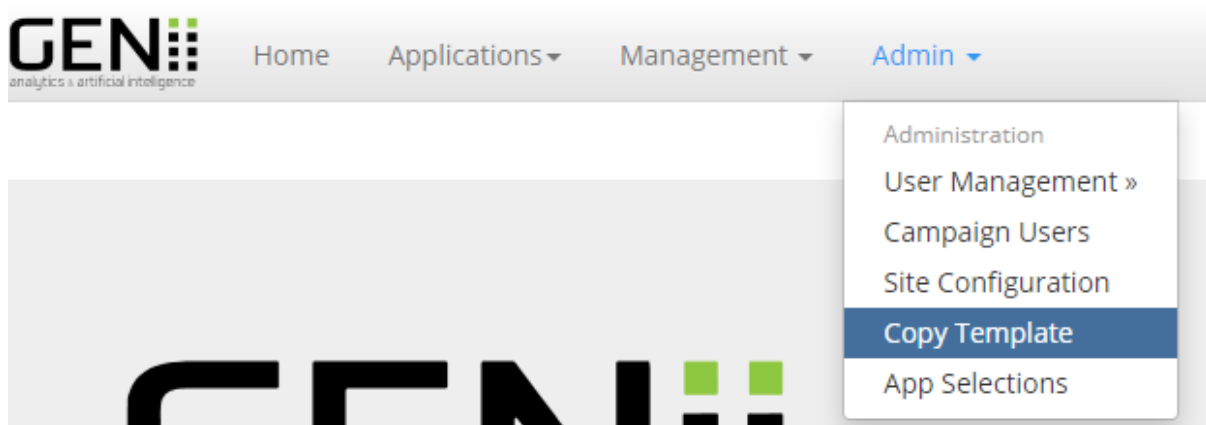
This function is available to anyone with a SysAdmin profile.

The process is done over two parts, namely:

1. Export target campaign from a site.
2. Import target campaign to new site.

Export Campaign

On the home page, select Copy Template from the Admin Menu



Select the campaign you wish to copy from the drop down in the Export Template Box.

(if you cannot find it here, check the status on campaign management and change it to RUN or NEW)

Export Template

The following option allows you to export a Campaigns "Questions" and "Lists" to a file (.TSF) The file then can be imported into a new Campaign on a different Site.

Select campaign to export questions from: Insurance | Collections | AQA

Export Questions to TSF File
Export Lists to TSF File

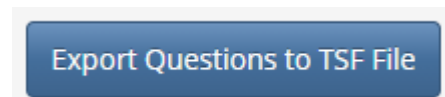
You will note that you will have to export the questions and list separately.

This is for convenience as you may not need the lists associated with the questions.

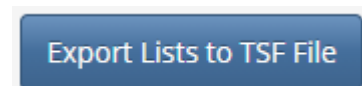
(Note, although the agent, team leader and manager list will copy over it will not implement due to people manager)

Once you have selected the appropriate campaign, you will have to decide if you need both the questions and lists from the campaign.

To export the questions, click the export questions button. (what you will find on question management or question wizard)



To export the list, click the export list button (what you will find on list management)



Click both if required.

The files will download to your laptop download folder as .TSF files.

You can and may want to rename the files according to the campaign details if you are doing multiple campaigns or will be re-using the same questions / lists.

You can also save the files to another location.

Downloads			
	Name	Date modified	Type
▼	Today (8)		
	QuantumTemplate_Lists_20210120.TSF	20/01/2021 09:28	TSF File
	QuantumTemplate_Questions_20210120.TSF	20/01/2021 09:28	TSF File
	Calibration_Assessment_Report (19).pdf	20/01/2021 09:07	PDF File
	Calibration_Assessment_Report (18).pdf	20/01/2021 08:56	PDF File
	Export Page - Genii App.pdf	20/01/2021 08:25	PDF File

Import Campaign

Once you have the files saved and ready for import you need to create a new campaign to allocate the lists and questions too.

On campaigns management create a new campaign and select (Blank Campaign) in Campaign Template.

Create a new Campaign

Campaign Details

Description

Import Campaign

Customer ID

Insurance

Campaign Configuration

Campaign Product

AQA

Campaign Template

(Blank Campaign)

Create Campaign

Cancel



This will create a campaign with no questions or lists.

Question Management

[Create New Section](#)

Campaign: Import Campaign Index: Level: (All) Tab: (All) Reload Clear Filters

Level	ID	Index	Question	Question Tab	Category	Control	ParentID	Selection Options
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Connected to Live\Production Database: Insurance_AQA_DB

Application Build: 3.0.23.290 Powered By GEN

List Management

Add a new List

Type: ALL Lists Campaign: Import Campaign List Name: List Value: Go Clear

Campaign	Access	List Name	Values
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Application Build: 3.0.23.290 Powered By GEN

Now go back to Copy Template on the Admin menu.

You will see all NEW templates on the drop-down box in the Import a Template box.

Select the campaign you wish to import too.

Import a Template

The following option allows you to import from a file (.TSF) into a existing Campaigns.
Please note that only Campaigns set to Status of **New** can be imported.

Select campaign to import into:

Import Campaign

Import Campaign

Test Campaign

1st Check Campaign

You will always be required to check the campaign before you import.

If there is data already there you will get a message as seen in the example below and you will have an option to delete this data before doing the import (preferred choice).

Import a Template

The following option allows you to import from a file (.TSF) into a existing Campaigns.
Please note that only Campaigns set to Status of **New** can be imported.

Select campaign to import into:

Test Campaign

1st Check Campaign

If you are adding a new list or question set, please delete Lists or Questions before you add a new file, if required!

Delete Previous List's

 - Number of Lists loaded against Campaign **Test Campaign** is 8

Delete Previous Question's

 - Number of Questions Loaded against Campaign **Test Campaign** is 352

Select TSF file to upload:

Choose file

No file chosen

Import Question TSF File

Import Lists TSF File

As we created a blank campaign, we will get the following message.

Import a Template

The following option allows you to import from a file (.TSF) into a existing Campaigns.
Please note that only Campaigns set to Status of **New** can be imported.

This campaign has no Lists or Questions loaded. You will be importing into a blank Campaign.

Select campaign to import into:

Import Campaign

1st Check Campaign

If you are adding a new list or question set, please delete Lists or Questions before you add a new file, if required!

Number of Lists: 0
Number of Questions: 0

Select TSF file to upload:

Choose file

No file chosen

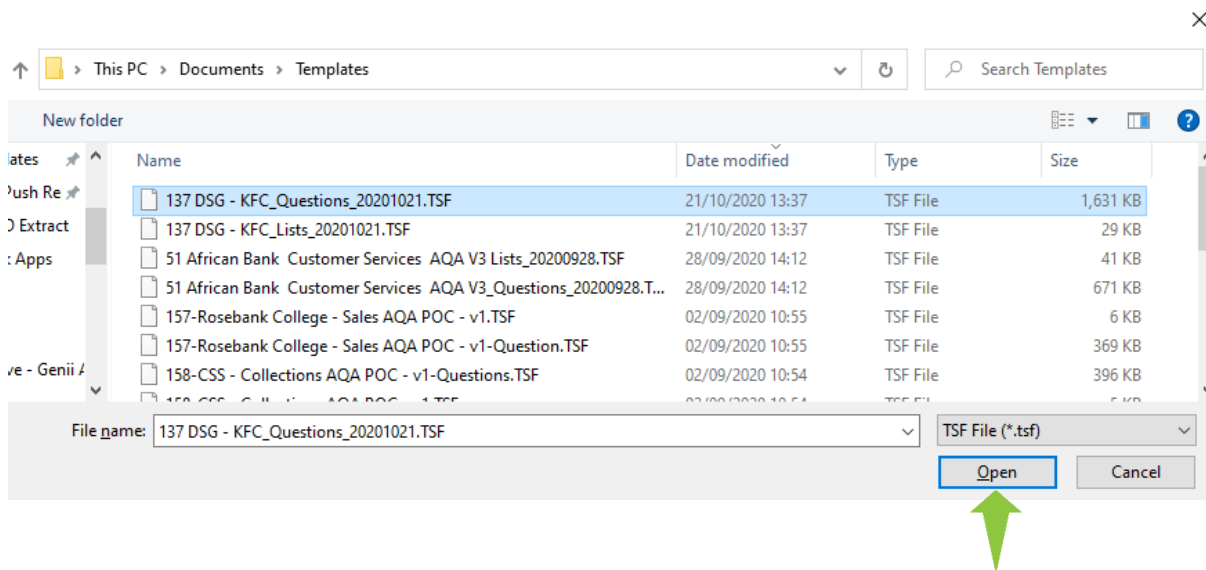
Import Question TSF File

Import Lists TSF File

As with the export, you will be required to import the questions and lists separately as per your requirements.

For this example, I will be using a file I have renamed and stored in another location.

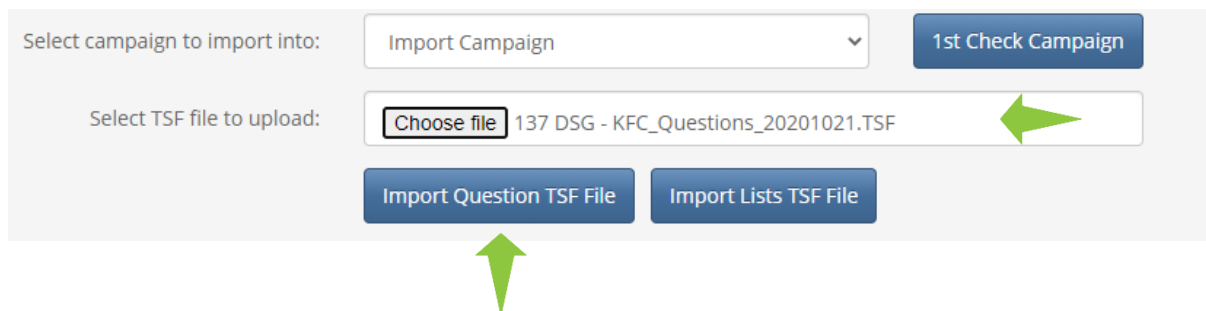
Click on Choose file and browse to the location you have saved the files.



Select the file you wish to import and select Open.

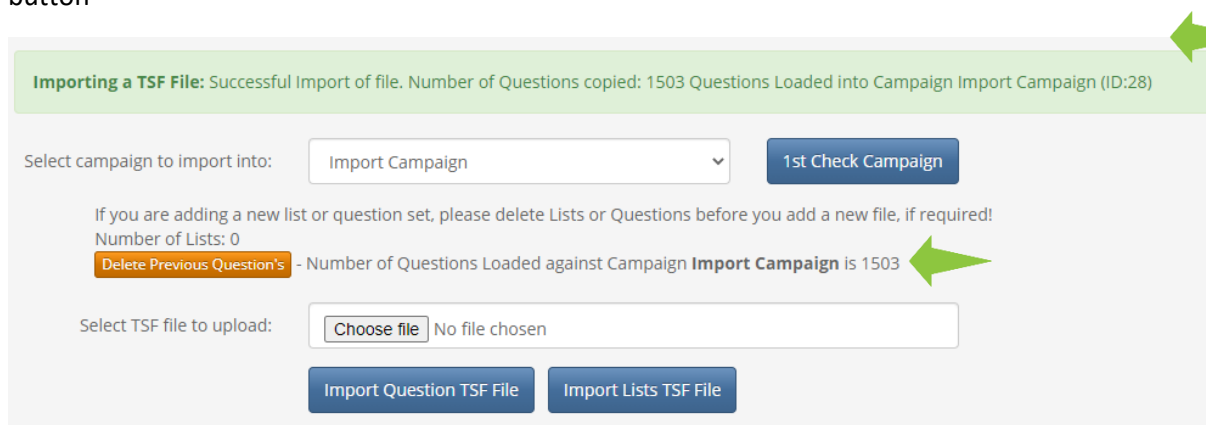
The file will now appear in the Choose file box and you will need identify where it needs to go and click the appropriate button.

In the example we will be loading Questions.



Once the import is complete you will get the following confirmation.

The list will can be uploaded in a similar fashion, selecting a list file and the Import Lists TSF File button



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