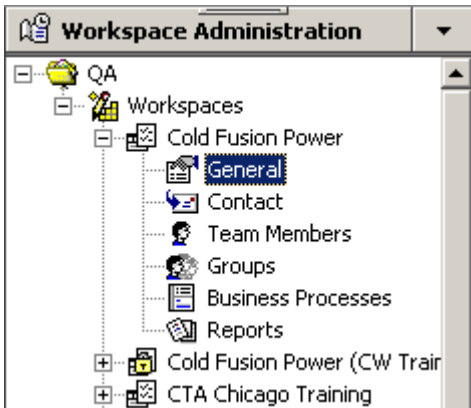


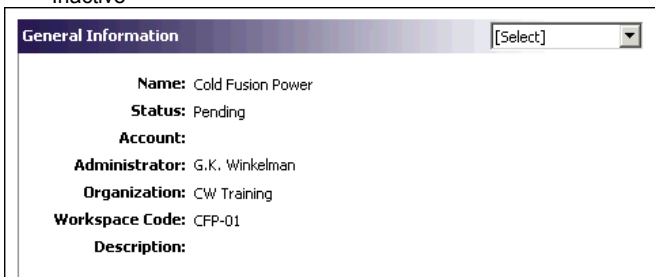
Clone a Project Workspace

Only users with Account Management administration privileges can clone project workspaces.

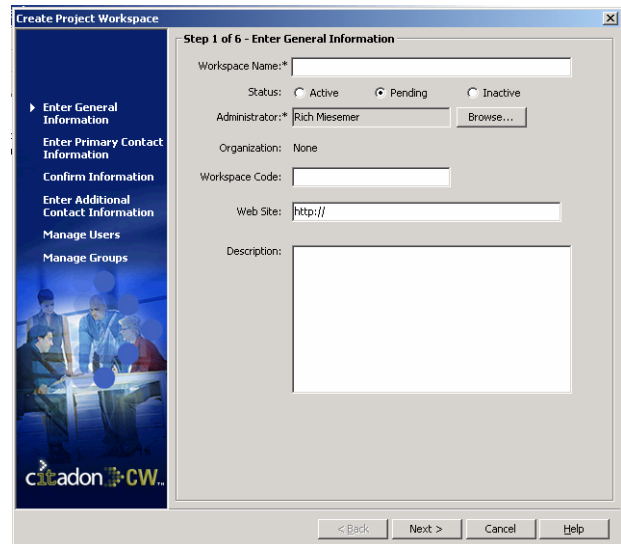
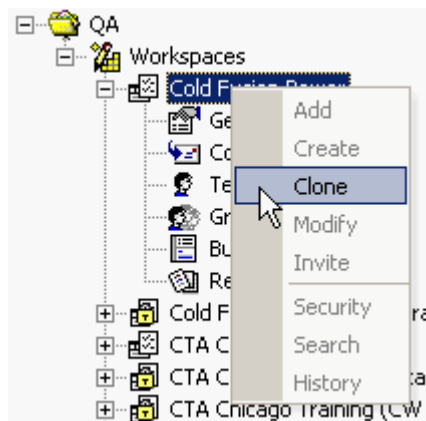
- From the left-hand navigation bar, select Workspace Administration.



- Make sure that the source workspace is set to Pending or Inactive



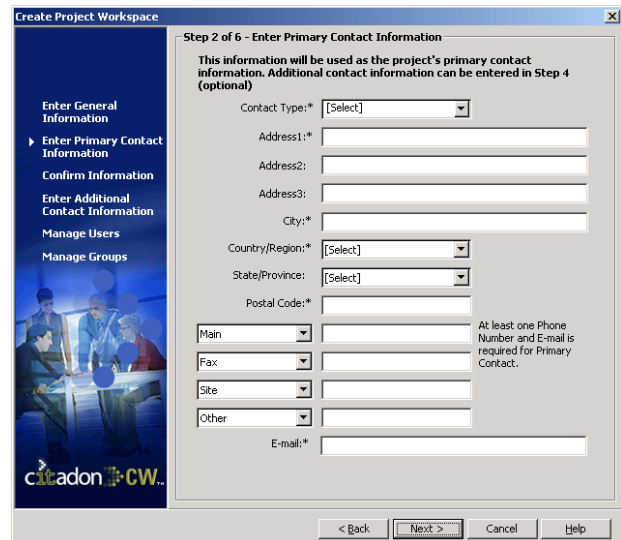
- From the left-hand navigation bar, right-click on the source workspace and select **Clone**.



- Enter the Workspace Name (required). Ignore the Status settings for now.

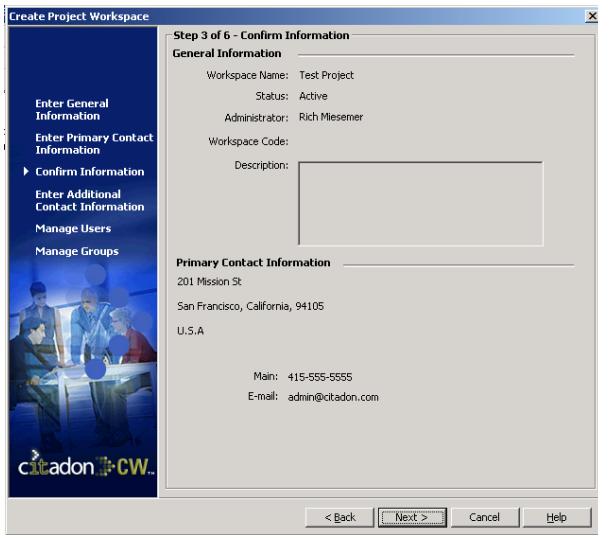
Cloned workspaces are initially set to Pending by the system so setting Status here will have no effect. Cloned workspaces must be set to Active when cloning is complete before they can be used.

- If you are not going to administer the new workspace, click **Browse...** and select the administrator for the new workspace.
- Enter a Workspace Code and Description, if desired.



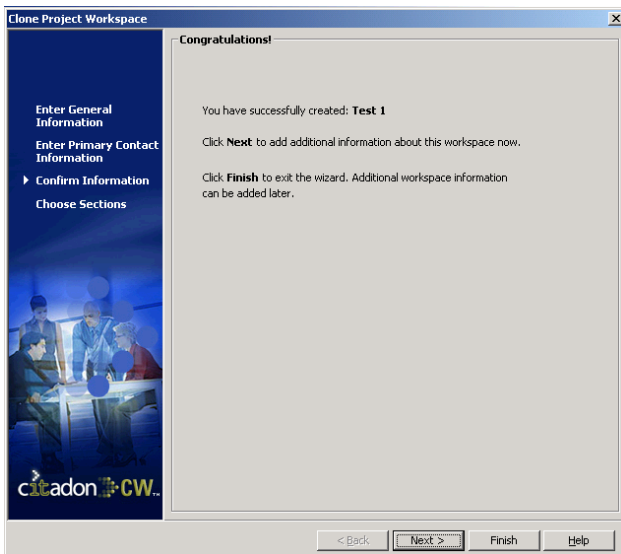
- CW will use the Contact Information from the source workspace. Make any changes that are necessary to the Contact Information

- When finished, click **Next >** to continue.

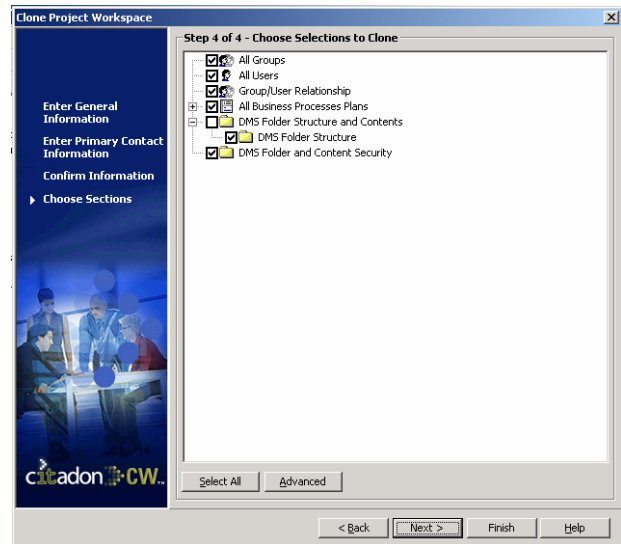


9. Review the contact information, and click **Next >** to continue.

Note: This is the last place at which the cloning process can be canceled without creating the workspace. Clicking the the Next button will create the shell of the cloned workspace.

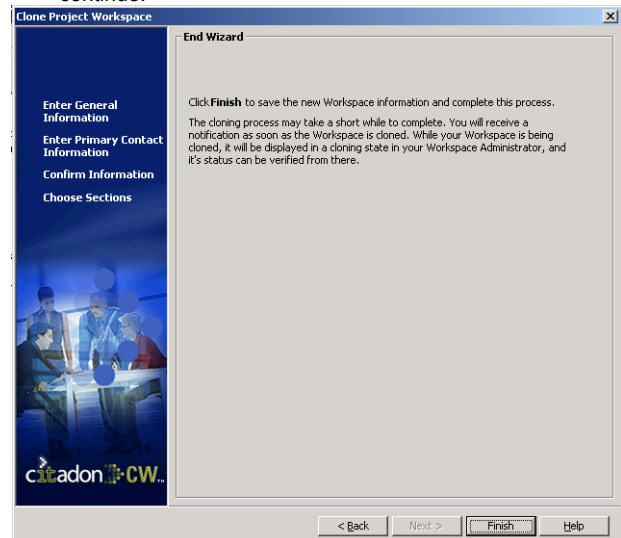


10. If the sections to be added to the clone are to be chosen later, then click **Finish** to exit the wizard. Otherwise, click **Next >** to chose the sections to be cloned.



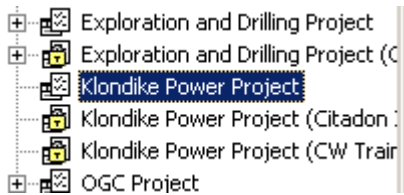
11. Select the sections to be cloned to this workspace.
- All Groups clones all groups from the source
 - All Users clones all users from the source
 - Group/User Relationship clones all groups and users plus their relationship to each other
 - All Business Process Plans clones all the business process templates from the source, including shortcuts and setups
 - DMS Folder structure and Contents clones the entire DMS. DMS Folder Structure just clones the folders but not the contents
 - DMS Folder and Content Security clones all of the source workspace's Document Management System folder and content security permissions

12. When all selections have been made, click **Next >** to continue.



12. Click **Finish** to begin populating the clone with the selected contents from the source

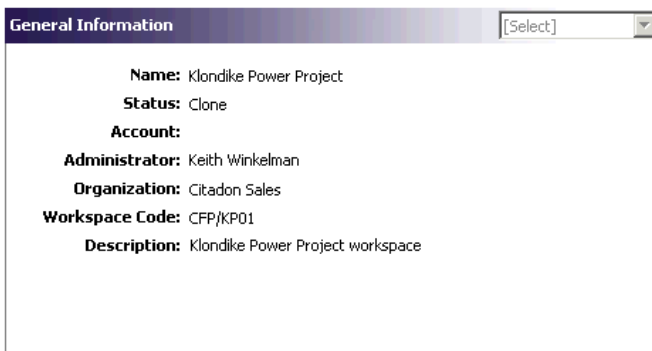
Note: Depending on what was selected and the amount of information to be cloned from the source, this process could take several minutes to complete.



The project will appear in the Workspace Administration tab, but will not be accessible while cloning is underway.

Check on Status

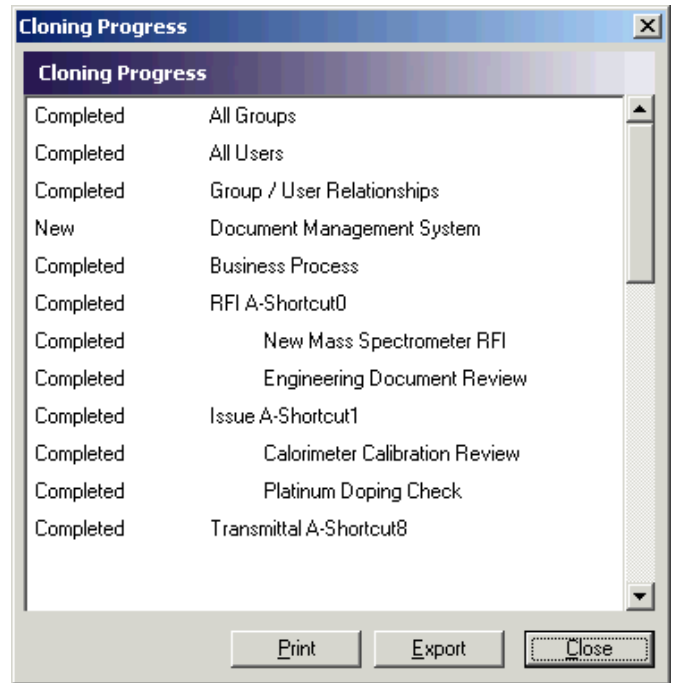
Citadon CW provides the administrator with the ability to check on the status of the cloning process.



The Status of the project workspace will be Cloned, so long as cloning is underway.



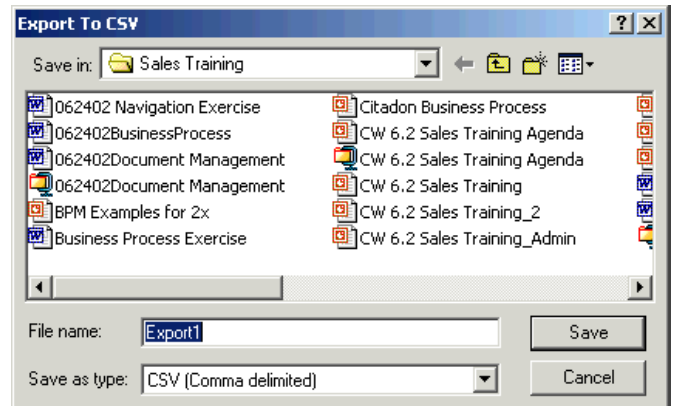
On the right hand part of the Summary Page, the administrator can click on the hotspot to be given the status of the cloning process



In this example, Groups, Users, Relationships, and are completed, as are the Business Process setups and templates. However, cloning of the Document Management System is not yet completed.

This report can be exported to a csv file for reporting. Click

Export and select the location and name of the export file, as shown below.



When the cloning of the workspace and all the selected contents is complete, then the Cloning Progress dialog will show Complete for all items, as shown below.

Once cloning is complete, then simply refresh the display (F5) and the cloned project is now available for use.

Remember to set the project to Active so that it can be used.