



## **Custodian**

### **Printable Help**

Version 10.0

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### **Abstract**

This document is a printable version of Custodian and Custodian Editor help.

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[https://help.genesys.com/latitude/10/desktop/Copyright\\_and\\_Trademark\\_Information.htm](https://help.genesys.com/latitude/10/desktop/Copyright_and_Trademark_Information.htm).*

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## Introduction to Custodian

Custodian runs tasks against your Latitude databases to accomplish end-of-day processing. If you are a premises-based client, you can schedule Custodian to run on the server using a SQL Server Agent Job. We recommend that you schedule it to run after hours when no users are logged on to Latitude. If you are a hosted client, Custodian runs nightly around midnight.

Custodian Editor allows you to create, configure, order, and maintain Custodian tasks. It releases with a standard set of tasks; however, you can create certain types of tasks as needed. For more information about the standard tasks, see [Task List](#). For more information about the types of tasks you can create, see [Task Types](#).

## What's New in Custodian

The following Service Updates (SU) introduced changes and enhancements to Custodian 10.0:

### SU 4

#### Tasks

- Added "Evaluate Promises" task, which evaluates kept or broken promises and updates the account queue level and status accordingly.
- Added "Review PCCs" task, which evaluates pending post-dated credit card payments and updates the account queue level and status accordingly.
- Added "Review PDCs" task, which evaluates pending post-dated check payments and updates the account queue level and status accordingly.

For more information, see [Task List](#).

### SU 5

#### Tasks

- Added "Debtor Credit Bureau Compile" task, which issues a recompile before calling the bulk Credit Bureau Reporting evaluation process to improve performance.
- Added "Debtor Credit Bureau Compile2" task, which issues a recompile after calling the bulk Credit Bureau Reporting evaluation process to improve performance.
- Added "Debtor Credit Bureau Reset CbrPrevent" task, which resets the flag for evaluating disputed accounts.
- Added "Debtor Credit Bureau Force Disputes by Status" task, which evaluates disputed accounts to determine whether to include or exclude them in reports to the credit bureaus.
- Added "Debtor Credit Bureau ForceDeletes by Status" task, which sets the special note for accounts with a closed status that never reported previously so that the system doesn't include the accounts in reports to the credit bureaus.

For more information, see [Task List](#).

## SU 9

### Important!

If you upgrade from a Latitude version earlier than SU 9 to SU 9 or later, there is a **one-time** configuration task that you need to complete in Custodian. For more information, see [Configure Custodian for SU 9 or Later](#).

### Tasks

- Added "Evaluate Arrangements" task, which evaluates payment arrangements as follows:
  - If a non-linked account is in queue level 998 or 999, the stored procedure places the account's PCCs, PDCs, and promises on hold.
  - If an account has pending post-dated credit cards or checks, the stored procedure updates the queue level and status accordingly.
- Moved the functionality from the following tasks to the new "Evaluate Arrangements" task and removed the tasks:
  - "Set Inactive Closed Credit Cards," which deactivated PCCs for accounts in 998 or 999 queue level for arrangements that apply to non-linked accounts only.
  - "Set Inactive Closed Post Dated Checks," which deactivated PDCs for accounts in 998 or 999 queue level for arrangements that apply to non-linked account only.
  - "Set Inactive Closed Promises," which deactivated promises for accounts in 998 or 999 queue level for arrangements that apply to non-linked accounts only.
  - "Review PCCs," which evaluated accounts with pending post-dated credit cards and updates the queue level and status accordingly.
  - "Review PDCs," which evaluated accounts with pending post-dated checks and updates the queue level and status accordingly.

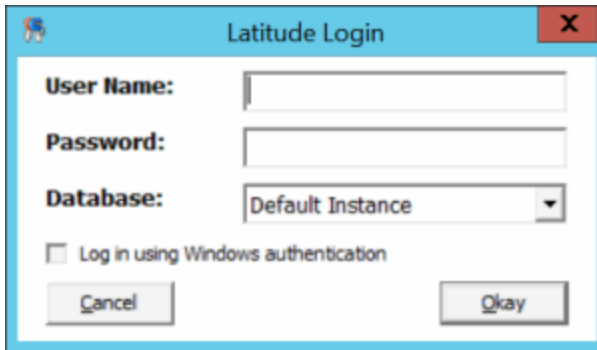
For more information, see [Task List](#).

### Log On to Custodian Editor

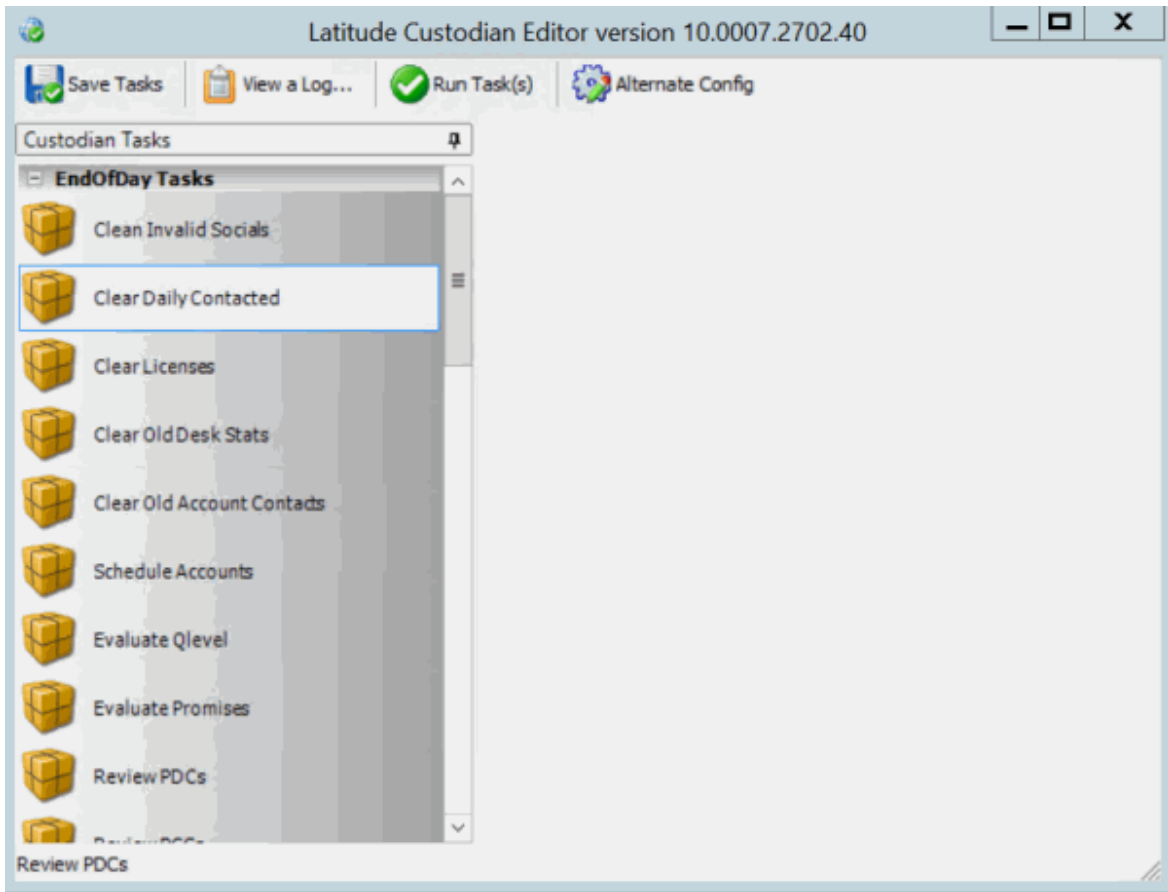
Use the **Latitude Login** dialog box to log on to Custodian Editor.

#### To log on to Custodian Editor

1. Open “\Program Files (x86)\Latitude Software\bin.”
2. Double-click **CustodianEditor.exe**. The **Latitude Login** dialog box appears.



3. In the **User Name** box, type your Latitude user name.
4. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.
5. Click **Okay**. The **Custodian Editor** window appears. It contains a list of standards tasks that released with Latitude, and any tasks your organization created.

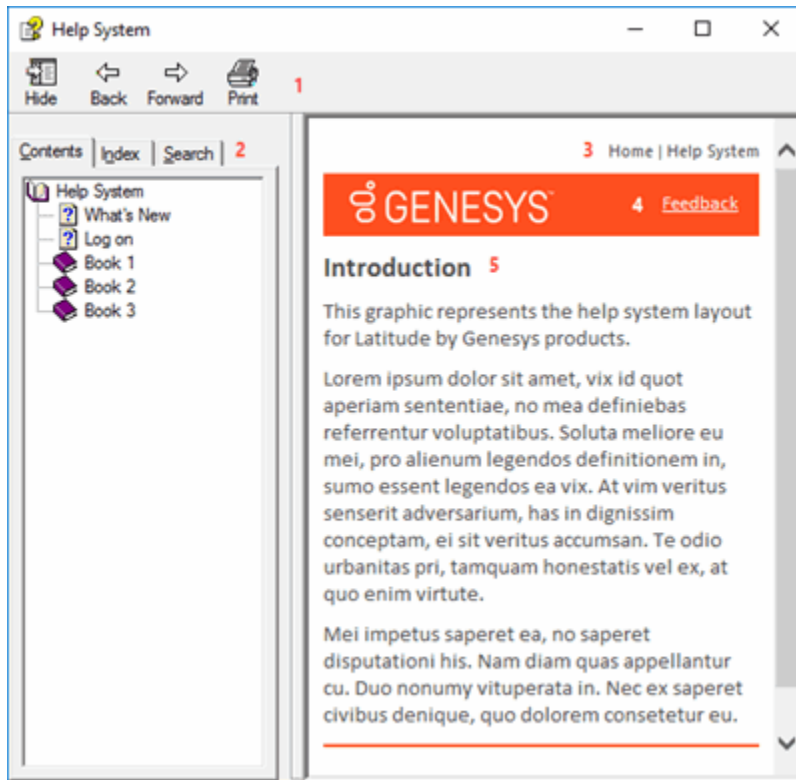


## Help Overview

Custodian help provides you with information for using Custodian and Custodian Editor. To locate and view a topic, use the table of contents, index, and search features.

### To open help

In the "\\Latitude Software\Documents" folder, double-click **Custodian.chm**. The **Custodian Help** window appears.



**Tip:** To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

1. **Toolbar:** Allows you to hide or show tabs and the **Navigation** pane, move forward and backward through topics, and print the currently displayed topic.
2. **Tabs:** Displays the following:

**Contents:** Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.

**Index:** Displays the index. To display a topic in the Content pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.

**Search:** Displays the [search feature](#). To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.

**Glossary:** If available, displays a list of terms and their definitions. To display a definition, click the term.

3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.
4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.

5. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

## Search feature

You can use the search feature to search for topics that contain words or phrases that you specify. You formulate a search query following a specific [set of rules](#). You can include [wildcard expressions](#), [Boolean operators](#), and [nested expressions](#) in your search query. A list of topics that match your search criteria appear in the search results. When you click a topic title in the search results, the content of that topic appears in the **Content** pane.

## Search syntax

The basic rules for formulating search queries are:

- Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.
- You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.
- The search engine ignores punctuation marks and special characters such as @#\$%^&()=+[ ]\.
- Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

## Wildcard expressions

Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. A question mark represents a single character, while an asterisk represents one or more characters.

Search for...	Example	Result
Topics with text that starts with one or more specified characters and ends in any character or number of characters	log or log*	Returns all topics with text that starts with the specified characters (for example, log, logon, logging).
Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters	32?57	Returns all topics with text that has any character where you placed the question mark (for example, 32?57 returns 32257, 32457, and 32857).
Topics that contain all the words specified, in any order or placement within the topic	account status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
Topics that contain the specified phrase	"account status"	Returns all topics with account status as a phrase. For example, the search returns topics with "the account status..." but not "the status of the account..."



## Boolean operators

Boolean operators (AND, OR, NOT, NEAR) allow you to create a relationship between terms. If you don't specify an operator, the system uses AND by default.

Search for...	Example	Result
AND	account AND status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
OR	account OR status	Returns all topics with either account or status, or both.
NOT	account NOT status	Returns all topics with account but not status.
NEAR	account NEAR status	Returns all topics where account is within eight words of status.

## Nested expressions

Nested expressions allow you to perform complex searches. For example, queue AND ((collector OR clerical) not supervisor) finds topics containing queue and collector but not supervisor, or containing queue and clerical but not supervisor. As with mathematical expressions, the system evaluates expressions in parentheses first. If there is no parenthesis, the system evaluates the expression from left to right. For example, queue NOT (clerical OR supervisor) finds topics containing queue but not clerical or supervisor. Queue NOT clerical OR supervisor finds topics containing queue but not clerical, or topics containing supervisor.

## Configure Custodian for SU 9 or Later

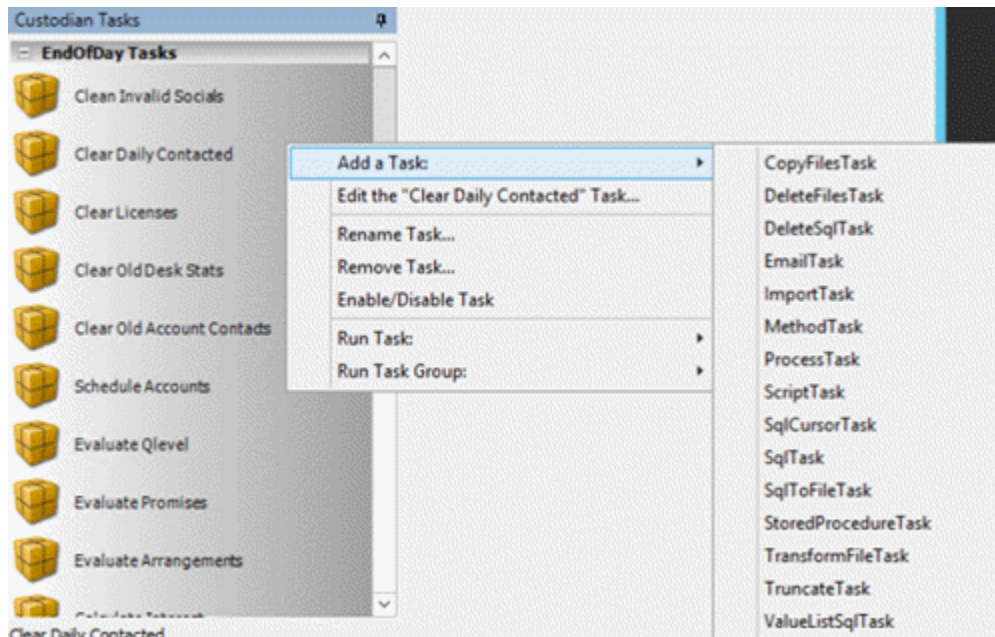
If you upgrade from a Latitude version earlier than SU 9 to SU 9 or later, complete these instructions the **first time you upgrade only**.

### To configure Custodian for SU 9 or later

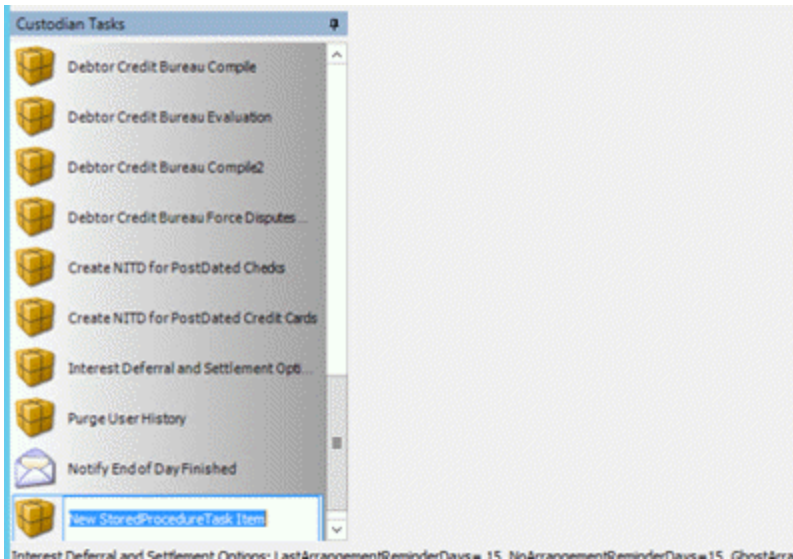
- In the **Custodian Tasks** pane, right-click the **Review PDCs** task and then do one of the following:
  - To remove the task, click **Remove Task** and then, in the confirmation dialog box, click **Yes**. Custodian deletes the task.
  - To disable the task, click **Enable/Disable Task**. Custodian changes the icon next to the task to a stop sign.
- In the **Custodian Tasks** pane, right-click the **Review PCCs** task and then do one of the following:
  - To remove the task, click **Remove Task** and then, in the confirmation dialog box, click **Yes**. Custodian deletes the task.

## Custodian Printable Help

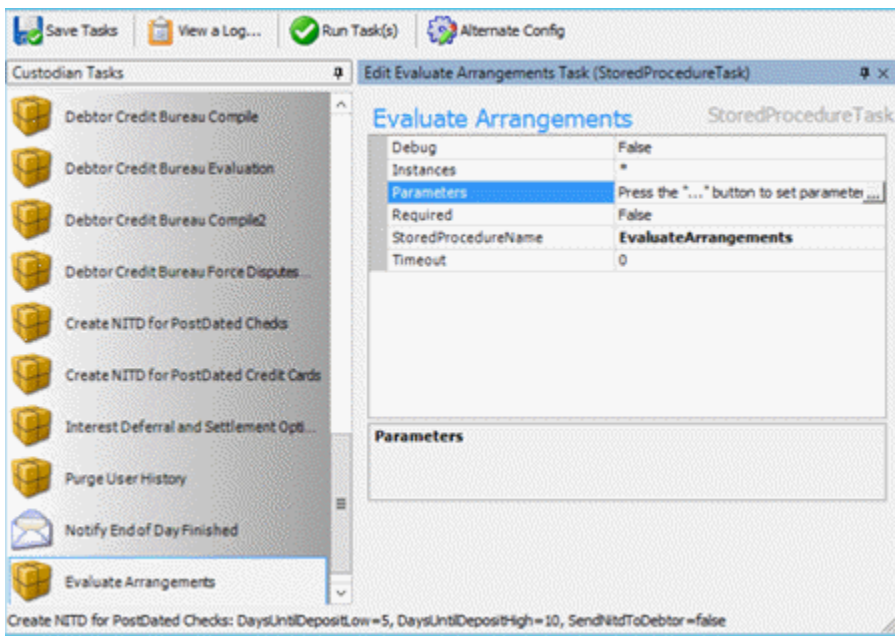
- To disable the task, click **Enable/Disable Task**. Custodian changes the icon next to the task to a stop sign.
3. In the **Custodian Tasks** pane, right-click the **Set Inactive Closed Promises** task and then do one of the following:
    - To remove the task, click **Remove Task** and then, in the confirmation dialog box, click **Yes**. Custodian deletes the task.
    - To disable the task, click **Enable/Disable Task**. Custodian changes the icon next to the task to a stop sign.
  4. In the **Custodian Tasks** pane, right-click the **Set Inactive Closed Post Dated Checks** task and then do one of the following:
    - To remove the task, click **Remove Task** and then, in the confirmation dialog box, click **Yes**. Custodian deletes the task.
    - To disable the task, click **Enable/Disable Task**. Custodian changes the icon next to the task to a stop sign.
  5. In the **Custodian Tasks** pane, right-click the **Set Inactive Closed Credit Cards** task and then do one of the following:
    - To remove the task, click **Remove Task** and then, in the confirmation dialog box, click **Yes**. Custodian deletes the task.
    - To disable the task, click **Enable/Disable Task**. Custodian changes the icon next to the task to a stop sign.
  6. Right-click in the **Custodian Tasks** pane and then click **Add a Task**. A list of task options appears.



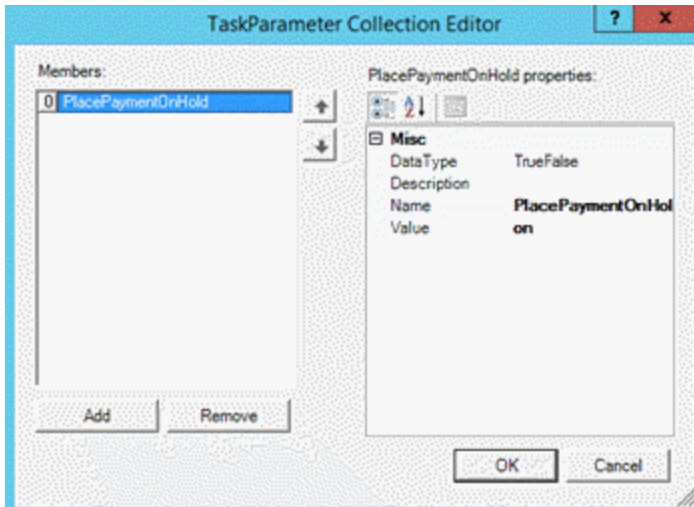
7. Click **StoredProcedureTask**. The system adds the task to the **Custodian Tasks** pane and displays the task name in edit mode.



8. In the box, type "Evaluate Arrangements" and then press **Enter**.
9. Double-click the new task. The system displays the properties for the task in the **Information** pane.



10. In the **StoredProcedureName** box, type **EvaluateArrangements**.
11. In the **Parameters** row, click the ellipsis (...).



12. Do one of the following:

- To place future payments on hold when an arrangement is paying multiple accounts and one of the accounts to receive payments is closed, set the **Value** to "on".
- To not place future payments on hold when an arrangement is paying multiple accounts and one of the accounts to receive payments is closed, set the **Value** to "off".

Custodian deactivates future payments by default when all accounts are not closed, which is consistent with previous behavior.

13. In the toolbar, click **Save Tasks**.

## Tasks

### Tasks

Custodian Editor allows you to create, configure, and order the tasks that Custodian processes. It releases with a standard set of tasks that you can configure. It also allows you to create and configure certain types of custom tasks. You can specify which tasks to include in or exclude from processing, and specify the processing order.

### Task List

The following table lists the standard tasks that release with Latitude.

Task	Description
Build Custom Queues	Rebuilds custom queues as defined in the CustomQueue table. Calls stored procedure <b>CustomQueue_BuildQueues</b> .
Calculate Interest	Calculates interest accrued on accounts. Calls stored procedure <b>spInterest_Update</b> .

<b>Task</b>	<b>Description</b>
Clean Invalid Socials	Removes invalid social security numbers from the master and debtor tables. Calls stored procedure <b>spCleanInvalidSocials</b> .
Clear Daily Contacted	Removes old or erroneous records from the <b>Daily_Account_Contacted</b> table. Calls stored procedure <b>spClearDailyContacted</b> .
Clear Licenses	Removes old or erroneous records from the <b>User License</b> table. Calls stored procedure <b>spClearLicenses</b> .
Clear Old Account Contacts	Removes old account contact records from the <b>AccountContacts</b> table. Calls stored procedure <b>spClearOldAccountContacts</b> .
Clear Old Desk Stats	Removes old desk status records from the <b>DeskStats</b> table. Calls stored procedure <b>spClearOldDeskStats</b> .
Create NITD for Post Dated Checks	Creates Notice of Intent to Deposit (NITD) letter requests for post-dated checks (PDCs). Calls stored procedure <b>spCreateNitdLetterFromPostDatedChecks</b> .
Create NITD for Post Dated Credit Cards	Creates Notice of Intent to Deposit (NITD) letter requests for post-dated credit cards (PCCs). Calls stored procedure <b>spCreateNitdLetterFromPostDatedCreditCards</b> .
Debtor Credit Bureau Compile	Issues a recompile before calling the bulk Credit Bureau Reporting evaluation process to improve performance. Calls stored procedure <b>sp_recompile cbrevaluatebulk_nocursor</b> .
Debtor Credit Bureau Compile2	Issues a recompile after calling the bulk Credit Bureau Reporting evaluation process to improve performance. Calls stored procedure <b>sp_recompile cbrevaluatebulk_nocursor</b> .
Debtor Credit Bureau Evaluation	Evaluates accounts against Credit Bureau Reporting Console configuration to determine whether to report the accounts to the credit bureaus. Calls stored procedure <b>cbrEvaluate</b> .
Debtor Credit Bureau Force Deletes By Status	Sets the special note for accounts with a closed status that never reported previously so that the system doesn't include the accounts in the report to credit bureaus. Calls stored procedure <b>cbrForceDeletesByStatus</b> .
Debtor Credit Bureau Force Disputes by Status	Evaluates disputed accounts as follows:

Task	Description
	<ul style="list-style-type: none"> <li>• If the disputed accounts didn't report to the credit bureaus as disputed previously, the stored procedure sets the compliance condition on the pending table to include the code in the next report to the credit bureaus.</li> <li>• If the disputed accounts reported to the credit bureaus as disputed previously and have since reported as deleted, the stored procedure sets the compliance condition on the pending table to exclude the code in subsequent reports to the credit bureaus.</li> </ul> <p>Run this task after running the Debtor Credit Bureau Evaluation task. Calls stored procedure <b>cbrForceDisputesByStatus</b>.</p>
Debtor Credit Bureau Reset CbrPrevent	Resets the flag for evaluating disputed accounts. Run this task before running the Debtor Credit Bureau Evaluation task. Calls stored procedure <b>cbrResetCbrPrevent</b> .
Evaluate Arrangements	<p>Evaluates payment arrangements as follows:</p> <ul style="list-style-type: none"> <li>• If a non-linked account is in queue level 998 or 999, the stored procedure places the account's PCCs, PDCs, and promises on hold.</li> <li>• If an account has pending post-dated credit cards or checks, the stored procedure updates the queue level and status accordingly.</li> </ul> <p>Calls stored procedure <b>EvaluateArrangements</b>.</p> <p><b>Note:</b> To turn off this feature, set the <b>PaymentOnHold</b> parameter to "off."</p>
Evaluate Promises	Evaluates accounts to determine whether the debtor kept or broke the promise and updates the queue level and status accordingly. Calls stored procedure <b>spEvaluatePromises</b> .
Evaluate Qlevel	Evaluates the queue level and "should queue" flag on accounts and updates accounts accordingly. Calls stored procedure <b>spEvaluateQLevelShouldQueue</b> .
Interest Deferral and Settlement Options	Sets reminders and letters for accounts configured to defer interest, hold settlement arrangements, or both. Also used to reset interest and settlement amounts using grace periods and

Task	Description
	expirations. Calls stored procedure <b>spInterestDeferralAndSettlementOptions</b> .
Notify End of Day Finished	Sends a notification email that Custodian has finished processing. Attaches log files when requested.
Parse Debtor Names	Occurs once on each debtor record. Uses NetGender utility to place the first and last names into the proper column. Calls stored procedure <b>Debtors_ParseNames</b> .
Purge User History	Purges user history records older than a specific number of days. If a client didn't specify the days through a parameter in Custodian Editor, Custodian uses the default limit of 90 days. Calls stored procedure <b>spPurgeUserHistory</b> .
Request Letter Series Letters	Creates letter requests for letter series. Calls stored procedure <b>LetterSeries_InsertLetterRequests</b> .
Schedule Accounts	Sets up night queues, custom queues, new business, NSF's, and broken promises. Assigns the appropriate queue level to accounts based on age. Calls stored procedure <b>spScheduleAccounts</b> .
Schedule Broken Promises Letters	Creates letter requests for accounts with promises due on the current date that the debtor broke. Not in use for most agencies. Calls stored procedure <b>spScheduleBrokenPromiseLetters</b> .
Schedule Letter Series Letters	Creates letter requests for the letters specified in a letter series. Calls stored procedure <b>spScheduleLetterSeriesLetters</b> .
Schedule New Business	Sets new business accounts for the number of days indicated for the assigned desk to work accounts as new. Calls stored procedure <b>spScheduleNewBusiness</b> .
Schedule Reminder Letters	Creates letter requests for accounts with promises due the indicated number of days (promise days) from the current date. Calls stored procedure <b>spScheduleReminderLetters</b> .
Send Letters to Vendor V7	For Latitude 7 and earlier only.  Creates letter request files in the specified directory for vendor letters that have the <b>Vendor Letter</b> check box selected in Letter Console.

Task	Description
	To use this task, click the ellipsis next to the <b>Filename</b> box and click the directory to write the file to.
Send Letters to Vendor V8	For Latitude 8 and later only. Create letter request files in the specified directory for vendor letters that have the Vendor Letter check box selected in Letter Console. Disable this task and create a SQL task that calls "c:\collect2000\LetterFileWriter.exe."
Set Inactive Closed PostDates On Hold	Deactivates PCCs, PDCs, and promises for accounts in queue level 998 or 999 for arrangements that apply to non-linked accounts only. Calls stored procedure <b>spSetInactiveClosedPostDatesOnHold</b> .
Update Control File	Sets the date in the control file. Calls stored procedure <b>spUpdateControlfileEOD</b> .

### Task Properties

The following table lists the most common properties associated to tasks.

Property	Description
ActionCommand	Transact SQL statements to perform on data that the DataCommand query returned. You can use parameters in the statements with the same name as the columns that the DataCommand query returned. <b>Note:</b> The statements run on the server at one time instead of looped on the client, so write the transactions and other statements accordingly.
ActionCommand	Only used when creating multiple files. Indicates the SQL statement to run on each row that the DataCommand query returned. You can use parameters in the statements with the same name as the columns that the DataCommand query returned. The system creates a file using this query for each row of the data command. To create one file, set <b>Append=True</b> .
Append	If set to <b>True</b> and the target file exists, the system adds the information to the file instead of overwriting it. (XML format does not permit appending; use another <b>FileFormat</b> to append.)
Arguments	Command-line arguments to pass to the executable.













Property	Description
Attachments	Files to attach to a generated email. Separate multiple files with semicolons. You can use the following placeholders: \$CurrentLogFile, {0}=Current Database Instance Name {1}=Current Date
Command	SQL command to run.
DataCommand	Query used to select data into the server-side, fast-forward cursor.
DataCommand	Only used when creating multiple files; query to select data for each action command.
Debug	<b>True</b> = full debugging text to write to the log. <b>False</b> = minimum system messages recorded in file.
DeleteCommand	Contains a SQL DELETE statement.
DeleteFiles	Name of the files to delete; you can use wildcards. Separate multiple files with semicolons. For example, EndOfDay*.xml;Logs\SavedRecords\*.xls.
DeletedRecordsFileFormat	When <b>SaveDeletedRecords=True</b> , you can select the file format. For example, CommaDelimited, TabDelimited, Excel, or XML.
DestinationFolder	Folder to place the files you are moving or copying. If you only copy one file, you can specify the file name instead.
DestinationFtpLocation	FTP URL receiving copied files.
DontWriteEmptyFiles	If <b>True</b> and the files don't contain any data, the system doesn't create a file.
FailOnUnsuccessfulExitCode	If <b>True</b> and the exit code received is not equal to the SuccessfulExitCode, the process fails.
FileFormat	File format to create: CommaDelimited, Tab Delimited, Excel, or XML.
FileName	Name of the executable file to run.






Property	Description
FileName	Name of the file to create. You can use the following placeholders: \$FieldName = field from current row (used for multiple file creation) {0}=Current Database Instance Name {1}=Current Task Name {2}=Current Date (You can apply standard .NET formatting.) {3}=File name extension (based on <b>FileFormat</b> type).
FileName	Name of the file to transform. You can use the following placeholders: \$CurrentLogFile, {0}=Current Database Instance Name {1}=Current Date
From	Email address in the <b>From</b> field.
MailServer	SMTP mail server name
MessageText	Text to include in the body of the email. You can use the following placeholders: \$CurrentLogFile {0}=Current Database Instance Name {1}=Current Date
MoveFiles	<b>True</b> = Move files from one location to another instead of copying.
OverwriteExistingFiles	<b>True</b> = Overwrite existing files with the same name in destination folder.
Parameters	Allows you to pass a list of arguments or parameters to the SQL statement. The SQL statement uses the <b>Name</b> as a placeholder to accept the values listed.
PreCommand	Processing to occur before executing the main task.
PostCommand	Processing to occur after executing the main task.
Required	<b>True</b> = Immediately stop processing task list on Instance when the current task fails.
SaveDeletedRecords	<b>True</b> = Automatically create a file containing the deleted records.
SaveToFileName	Name to save the transformed file to. You can use the following placeholders: \$CurrentLogFile, {0}=Current Database Instance Name {1}=Current Date

Property	Description
SourceFiles	Name of the files to copy. You can use wildcards. You can separate multiple files be with semicolons. For example, EndOfDay*.xml;Logs\SavedRecords\*.xls. \$CurrentLogFile = copy the current log file.
StoredProcedureName	Name of the stored procedure to run.
Subject	Text to include in the Subject Line of the email. You can use the following placeholders: \$CurrentLogFile, {0}=Current Database Instance Name {1}=Current Date
SuccessfulExitCode	The expected exit code received from the executable file. Used with the FailOnUnSuccessfulExitCode property.
Timeout	Number of seconds that can elapse before ending the process.
To	A list of email addresses to receive the email notification, separated by commas or semicolons.
TransformedFileName	If the system transforms attachments, the system renames them to the file name specified. You can use the following placeholders: \$CurrentLogFile, {0}=Current Database Instance Name {1}=Current Date
ValueList	A list of values to substitute into the Command. The SQL command runs once for each value.
ValueParameterDataType	Data type used for the value list. Choices are True/False, Date, Number, Text, or SQL statement.
ValueParameterName	Name of the parameter to substitute with the list of values.
XSLFileName	The path\filename of an XSL file to use to transform the attachments or files specified.

## Task Types

The following table lists the available tasks and their description.

Icon	Task Type	Description and Usage
	CopyFilesTask	Copies, moves, or overwrites files. For example, you can use this task to copy log files to a different location, move processed vendor files, or place copies of files in backup folders.
	DeleteFilesTask	Deletes files that meet the specified criteria. For example, you can use it to delete log files after the system moves them.
	DeleteSqlTask	Performs a SQL DELETE command on rows of data meeting the specified criteria. Allows commands to execute before and after the delete process, and allows you to save deleted records to a file.
	EmailTask	Creates an email message notification with or without attachments for one or more recipients. You can convert text into HTML using XML/XSLT.
	ImportTask	Imports files based on the specified parameters.
	MethodTask	Executes a method in the specified class and assembly. This task allows Custodian to execute custom methods in third-party assemblies that have no knowledge of Custodian.
	ProcessTask	Runs a separate executable file, passes arguments to the file, and determines whether the file executed properly.
	ScriptTask	Not used.
	SqlCursorTask	Queries for data, then processes against the data on the server side. Uses separate commands to retrieve and then process the data.
	SqlTask	Runs a standard SQL command against the Instances specified.

Icon	Task Type	Description and Usage
	SqlToFileTask	Queries data and then processes each query result to create one or more files.
	StoredProcedureTask	Runs a stored procedure located in the Latitude database.
	TransformFileTask	Converts an XML file using an XSL file and saves it to a file for viewing in HTML format.
	TruncateTask	Removes erroneous data from the tables specified.
	ValueListSqlTask	Runs a SQL command on each value provided in a list against the databases specified. Values can be true/false, date, number, text, or a SQL statement. You can use parameters to populate the list.

### Change Task Processing Order

Custodian processes tasks in the order the tasks appear in the task list.

#### To change the task processing order

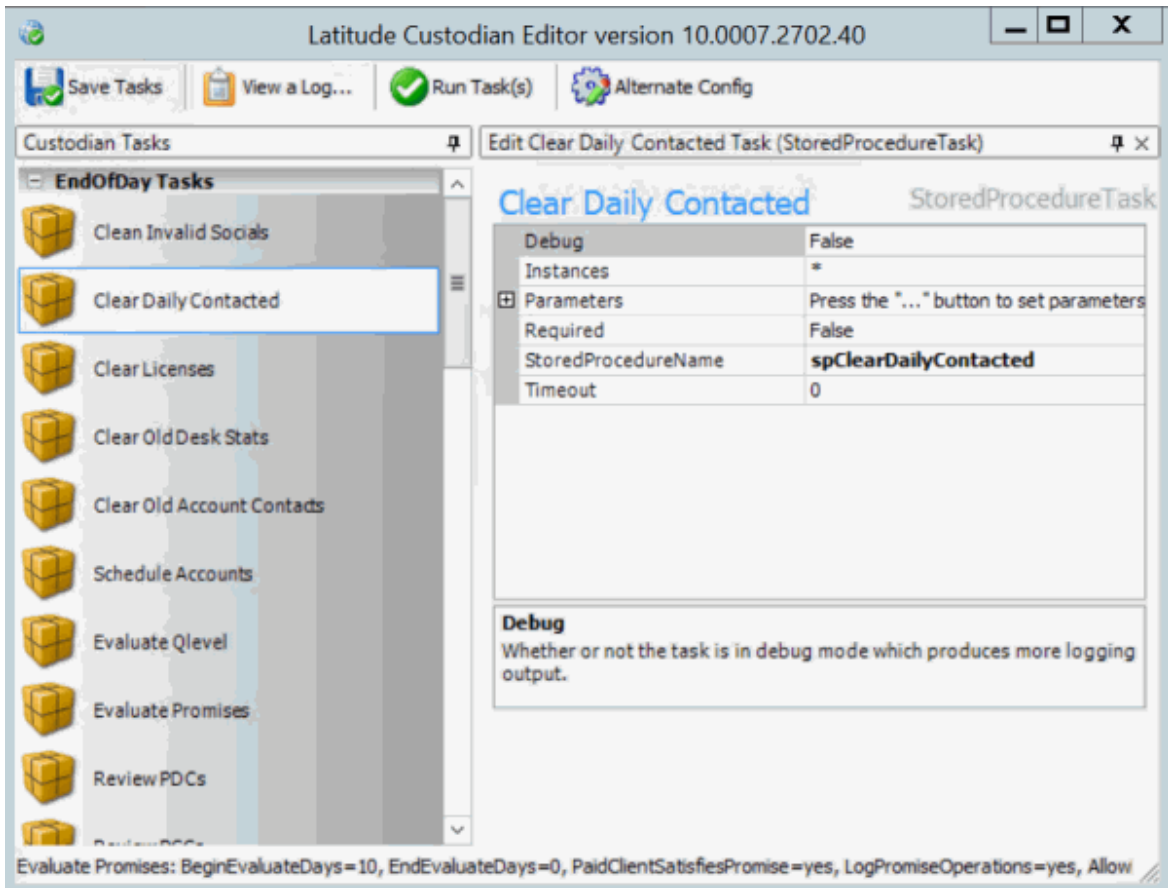
- In the **Custodian Tasks** pane, click a task then drag and drop it in the new location.

### View Task Properties

You can view the properties of a task, which show its configuration. For more information about properties, see [Task Properties](#).

#### To view task properties

- In the **Custodian Tasks** pane, double-click a task. The task properties appear in the **Information** pane.

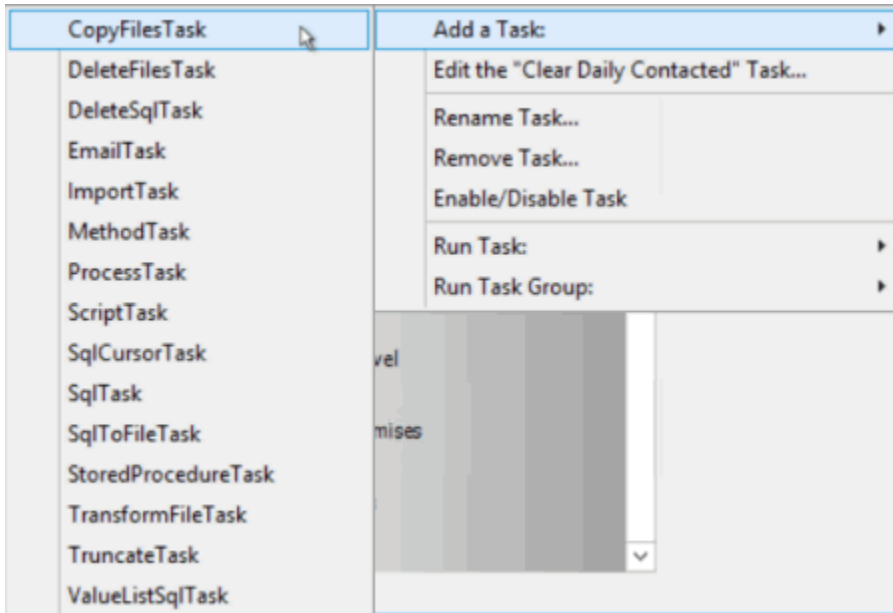


## Add a Task

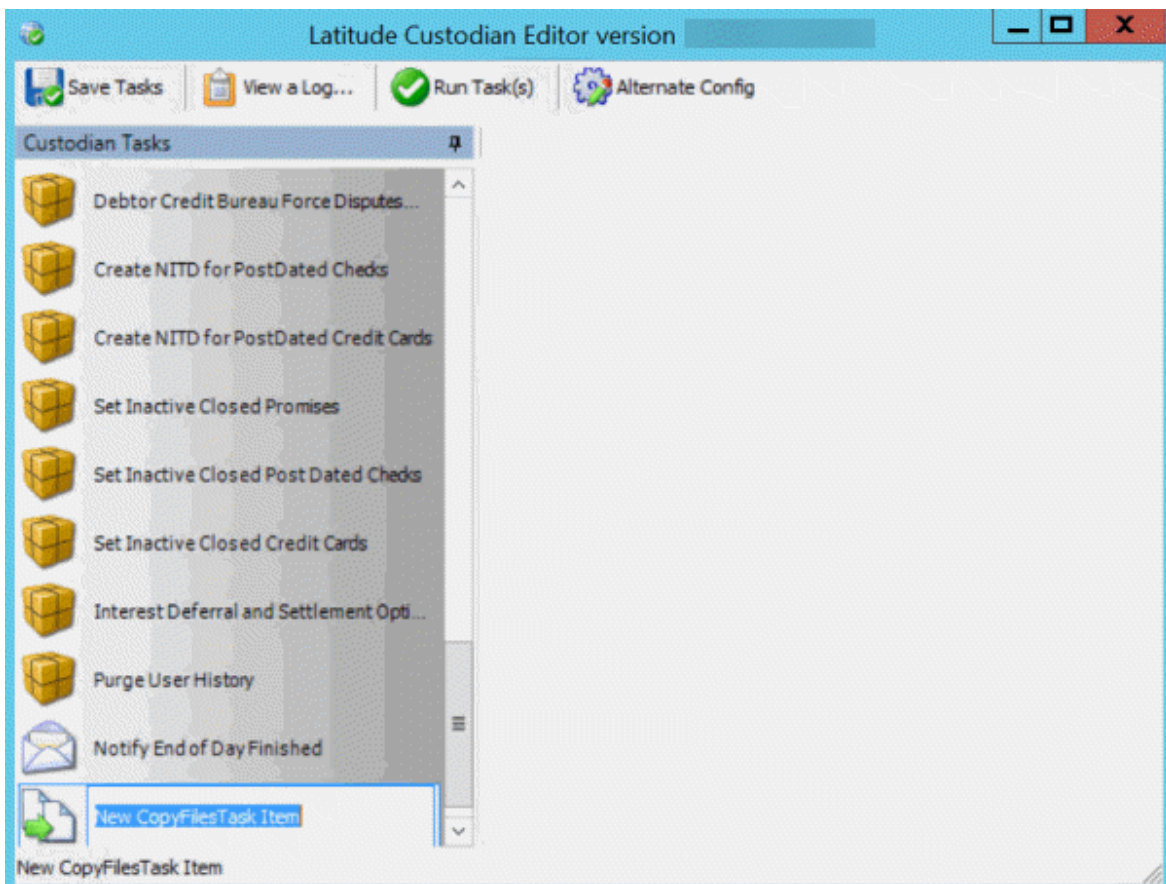
Custodian releases with a set of standard tasks and the ability to create your own tasks. For information about the types of tasks you can add, see [Task Types](#).

### To add a task

1. In the **Custodian Tasks** pane, right-click a task and then click **Add a Task**. A list of task options appears.

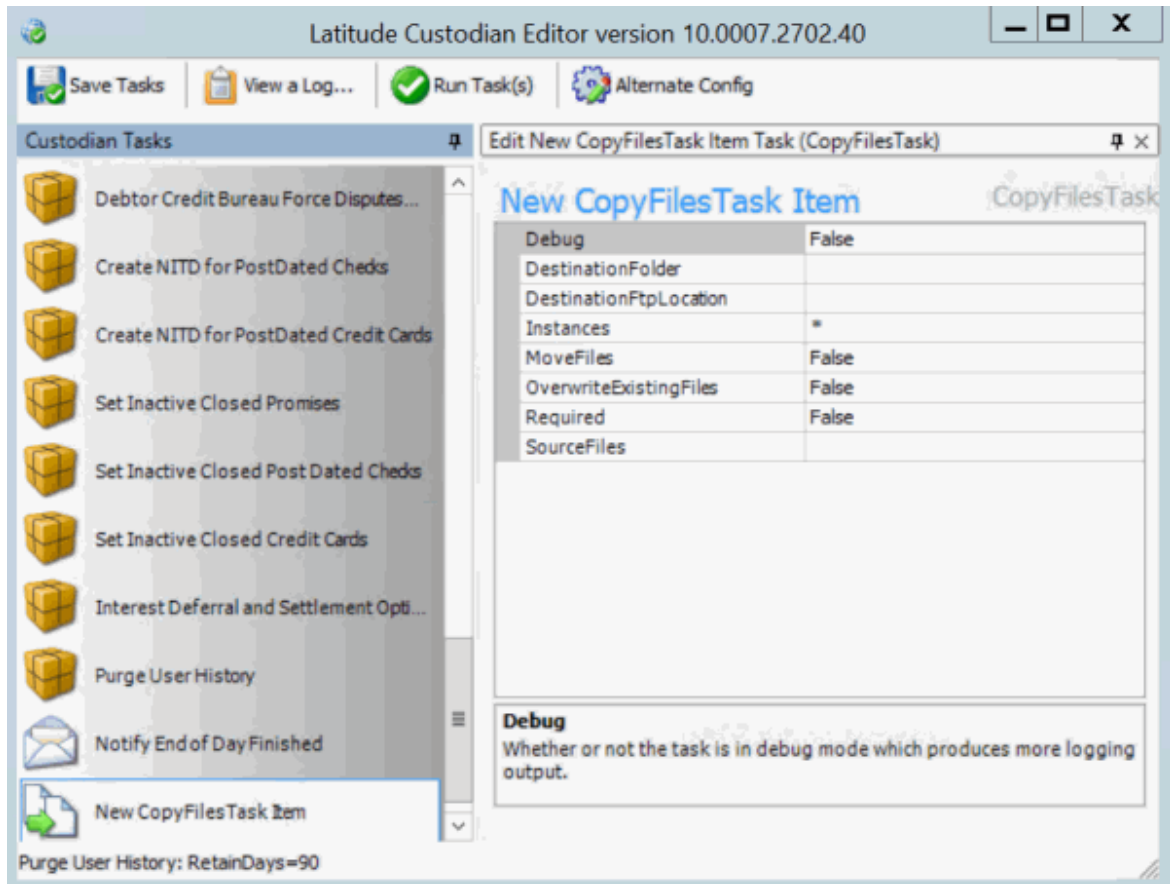


2. Click a task. The system adds the task to the **Custodian Tasks** pane and displays the task name in edit mode.



3. Do one of the following:
  - To rename the task, type over the name and then press **Enter**.

- To use the displayed name, press **Enter**.



4. In the **Custodian Tasks** pane, double-click the new task. The system displays the properties for the task in the **Information** pane.
5. Configure the properties and then, in the toolbar, click **Save Tasks**.

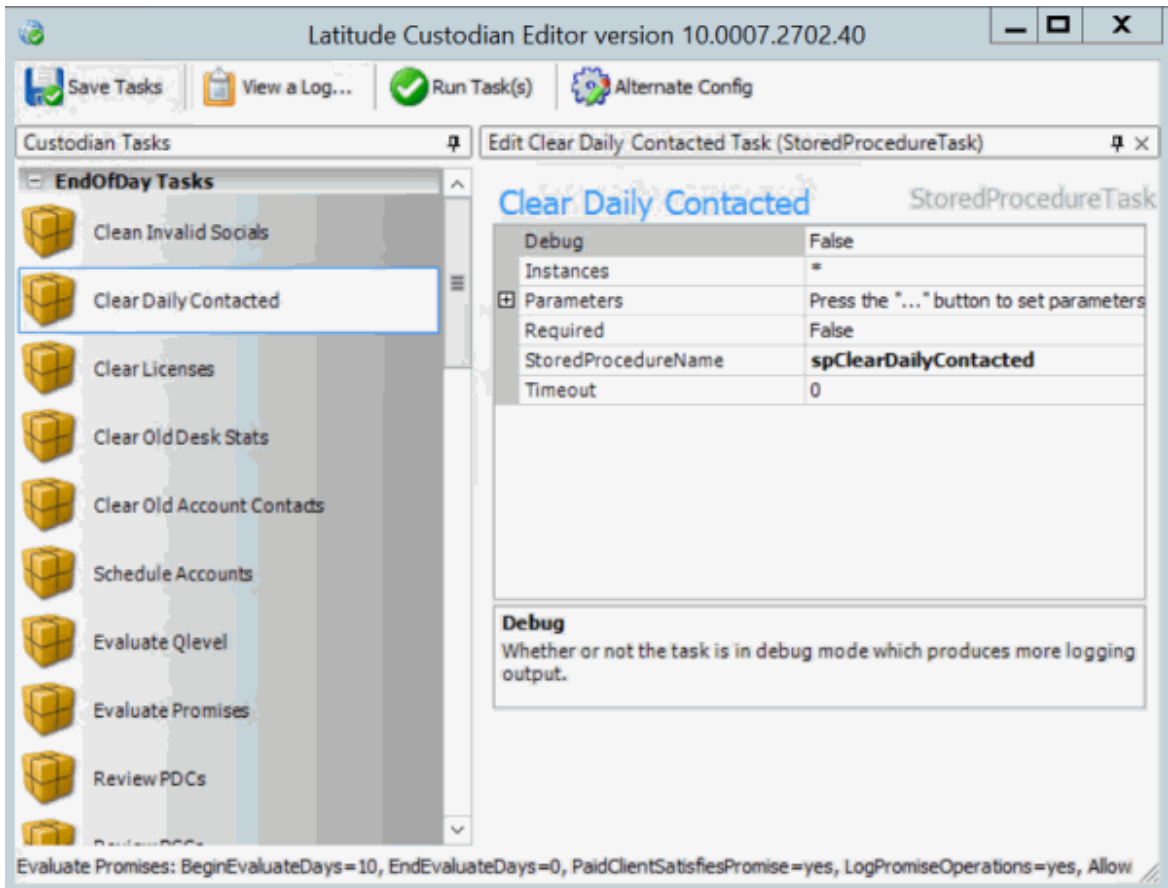
## Modify a Task

You can modify the configuration for a task. For more information about properties, see [Task Properties](#).

### To modify a task

1. In the **Custodian Tasks** pane, right-click a task and then click **Edit the [Task Name] Task**. The task properties appear in the **Information** pane.





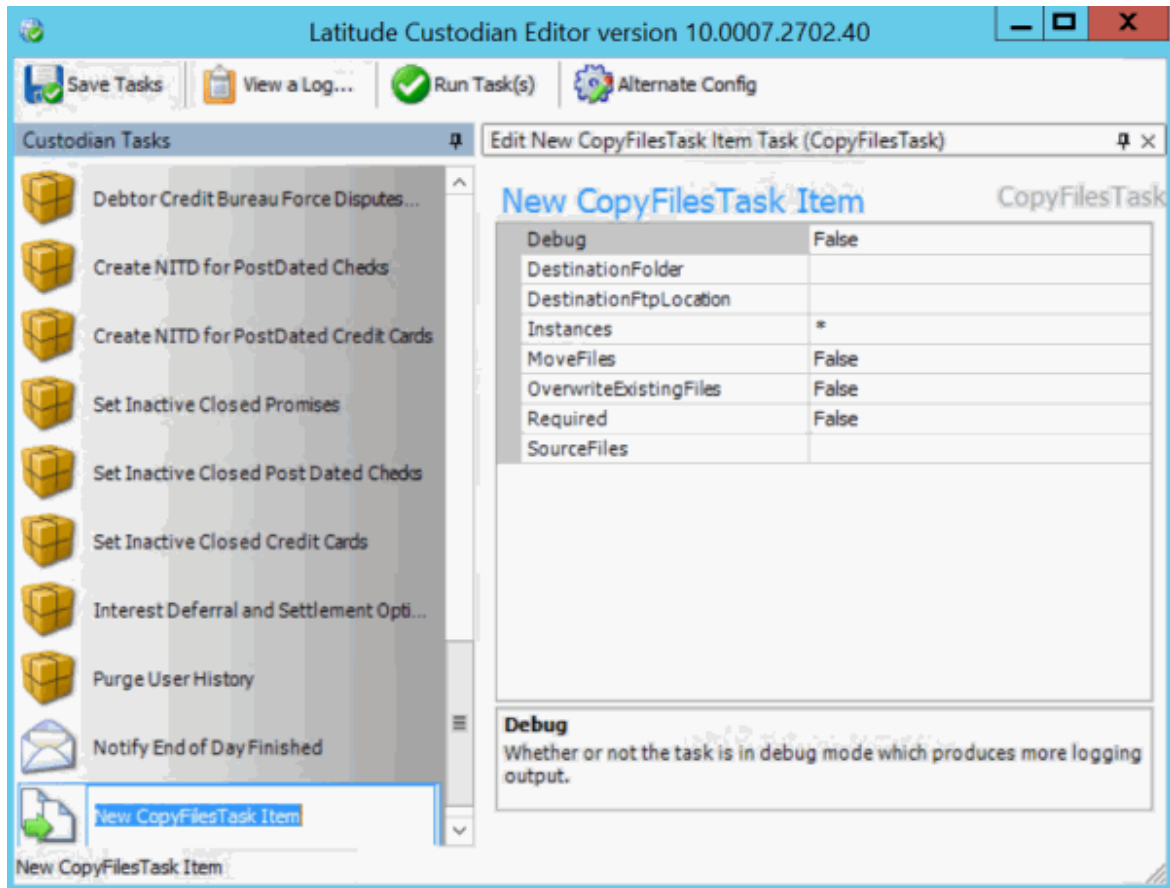
2. Modify the properties and then, in the toolbar, click **Save Tasks**.

## Rename a Task

You can rename a task.

### To rename a task

1. In the **Custodian Tasks** pane, right-click a task and then click **Rename Task**. The system displays the task name in edit mode.



2. Type over the name and then press **Enter**.

## Remove a Task

You can remove a task permanently.

### To remove a task

1. In the **Custodian Tasks** pane, right-click a task and then click **Remove Task**. A confirmation dialog box appears.
2. Click **Yes**. The system deletes the task.

## Include a Task in Processing

You can include a task in Custodian's nightly processing.

### To include a task in processing

- In the **Custodian Tasks** pane, right-click a task and then click **Enable/Disable Task**. The system changes the icon next to the task from a stop sign back to the task's original icon.

## Exclude a Task from Processing

You can exclude a task from Custodian's nightly processing.

### To exclude a task from processing

- In the **Custodian Tasks** pane, right-click a task and then click **Enable/Disable Task**. The system changes the icon next to the task to a stop sign.

### Run a Task on Demand

You can run an individual task on demand. You can run the task against all Latitude databases or a specific one.

#### To run a task

1. In the **Custodian Tasks** pane, right-click a task and then click **Run Task**. A list of options appears.
2. Do one of the following:
  - a. To run the tasks against all Latitude databases, click **On All Instances**.
  - b. To run the task against a specific Latitude database, click the database name (for example, **Collect2000**).

A confirmation dialog box appears.

3. Click **Yes**.

### Run a Task Group on Demand

You can run a pre-set group of tasks on demand.

#### To run a task group

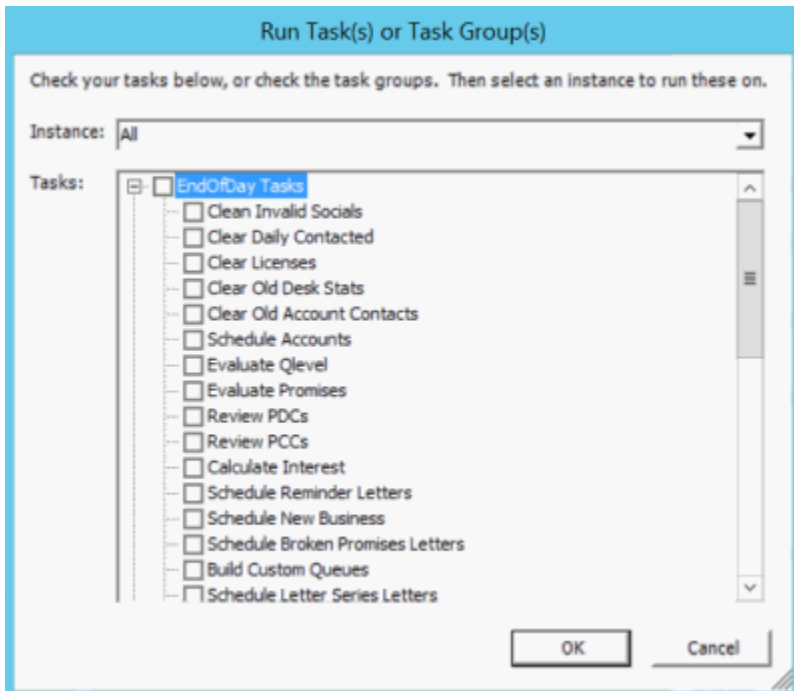
1. In the **Custodian Tasks** pane, right-click a task and then click **Run Task**. A list of options appears.
2. Click the task group to run (for example, **CustomTasks**). A confirmation dialog box appears.
3. Click **Yes**.

### Run Multiple Tasks or Task Groups on Demand

You can run multiple tasks or task groups on demand.

#### To run multiple tasks

1. In the toolbar, click **Run Tasks**. The **Run Task(s) or Task Group(s)** dialog box appears.



2. In the **Instance** list box, click the database to process tasks against.
3. In the **Tasks** list box, select the tasks or task groups to run. To exclude a task or task group, clear the check box.
4. Click **OK**.

## Log Files

### Log Files

The system creates a log file when a user runs a task or task group in Custodian Editor, or when Custodian runs tasks. The log file details show which tasks ran, the date and time the tasks ran, and the results. If the system encounters an exception, it includes the stack trace in the log file for troubleshooting purposes.

### View List of Log Files

You can view a list of log files that the system created to track tasks that a user ran in Custodian Editor or that Custodian ran.

#### To view a list of log files

1. In the toolbar, click **View a Log**. The **View Logs** tab appears.

Task Group / Instance	Date
EndOfDay	
Latitude	Fri Jun 02,
Latitude	Fri Jun 09,
Latitude	Fri Jun 16,
Latitude	Fri May 19,
Latitude	Fri May 26,
Latitude	Mon Jun 05
Latitude	Mon Jun 12
Latitude	Mon May 08
Latitude	Thu Jun 01,
Latitude	Thu Jun 08,
Latitude	Thu Jun 15,
Latitude	Thu May 25

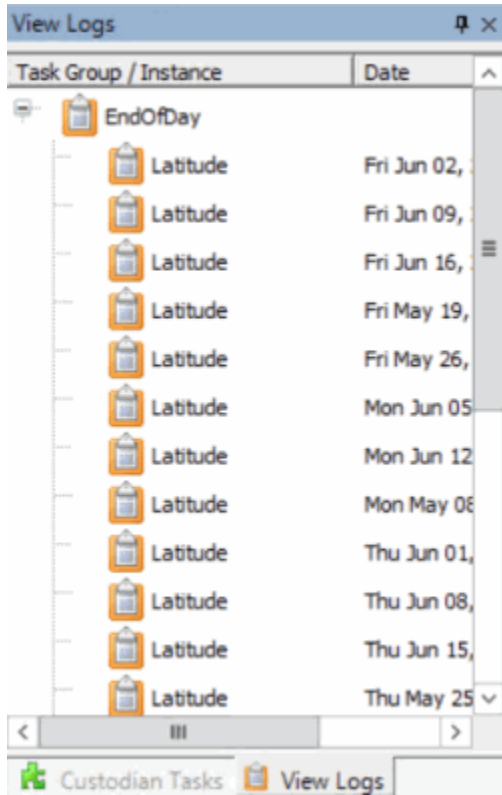
2. To change the sort order, click a column heading.

### View Log File Detail

You can view the details of a log file to see which tasks ran, the date and time, and the results.


#### To view log file detail

1. In the toolbar, click **View a Log**. The **View Logs** tab appears.



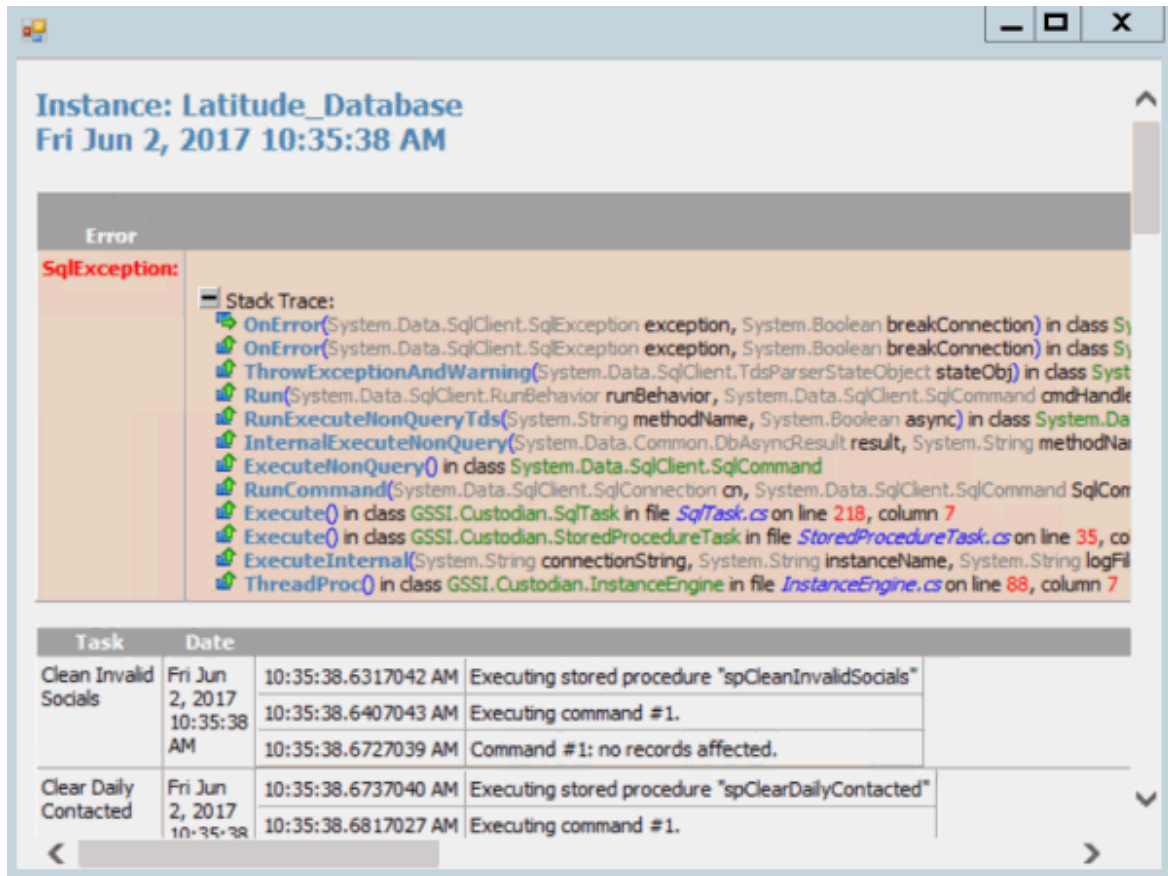
2. Double-click a task group or instance name. The system displays the details in a separate window.

Instance: Latitude\_Database  
Fri Jun 2, 2017 10:35:38 AM

Error Synopsis	
Error	Description
<b>SqlException:</b>	 Stack Trace:

Task	Date		
Clean Invalid Socials	Fri Jun 2, 2017 10:35:38 AM	10:35:38.6317042 AM	Executing stored procedure "spCleanInvalidSocials"
		10:35:38.6407043 AM	Executing command #1.
		10:35:38.6727039 AM	Command #1: no records affected.
Clear Daily Contacted	Fri Jun 2, 2017 10:35:38 AM	10:35:38.6737040 AM	Executing stored procedure "spClearDailyContacted"
		10:35:38.6817027 AM	Executing command #1.
		10:35:38.6837045 AM	Command #1.
Clear Licenses	Fri Jun 2, 2017 10:35:38 AM	10:35:38.6837045 AM	Executing stored procedure "spClearLicenses"
		10:35:38.6897037 AM	Executing command #1.
		10:35:38.6927033 AM	Command #1.
Clear Old Desk Stats	Fri Jun 2, 2017 10:35:38 AM	10:35:38.6927033 AM	Executing stored procedure "spClearOldDeskStats"
		10:35:38.6987040 AM	Executing command #1.
		10:35:38.7127024 AM	Command #1: no records affected.

- To view the stack trace details, click the plus sign (+) next to **Stack Trace**. The system expands the **Stack Trace** section.



- When finished viewing the information, click the plus sign (+) in the upper right corner of the window.

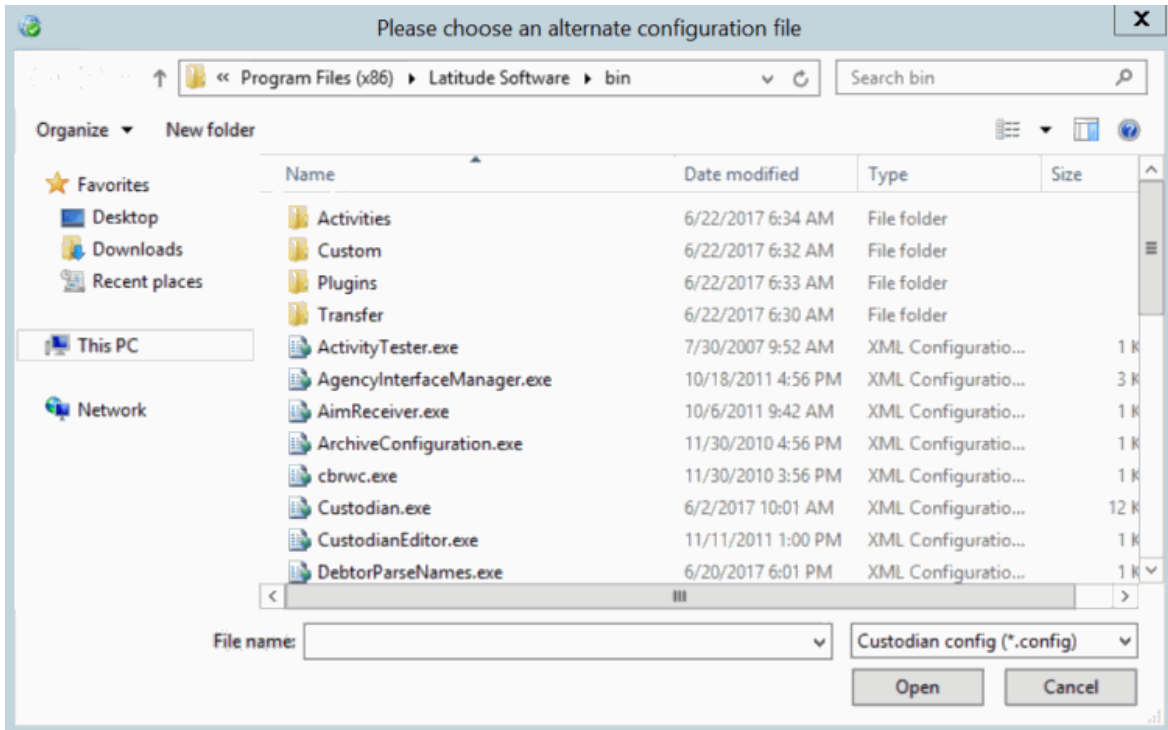
## Change the Configuration File

You can select an alternate configuration file for Custodian to use when processing data. The default configuration file is "Custodian.exe.config." You can copy this file, modify it, and save it as a new configuration file. You can then select this configuration file in Custodian Editor.

### To change the configuration file

- In the toolbar, click **Alternate Config**. The **Please choose an alternate configuration file** dialog box appears.





2. Click the configuration file and then click **Open**.