# GENESYS™

# Latitude® in the Cloud

## User's Guide

For Latitude Versions 8.33, 8.5, and 10.0

Last updated July 11, 2019

## Abstract

This document describes using Latitude applications in the Cloud environment.

# Table of Contents

# Introduction to Latitude in the Cloud

Latitude by Genesys applications are available through Latitude by Genesys' cloud platform built on Amazon Web Services (AWS) using Citrix Receiver as the delivery method. Your administrator installs and configures Latitude in the Cloud for you.

The *Latitude in the Cloud User's Guide* describes how to log on to and use your Latitude by Genesys applications in the Cloud. The Latitude applications available to you are based on what your organization purchased and licensed; and the permissions that your organization assigned to you.

# Latitude in the Cloud Access

There are three methods for logging on to the Latitude in the Cloud service:

- From your desktop without opening a web browser (recommended). For more information, see Log on to Latitude in the Cloud (Desktop).

- Using a web browser on a computer with Citrix Receiver installed. For more information, see Log on to Latitude in the Cloud (Browser and Citrix Receiver).

- Using a web browser on a computer with Citrix Receiver Light installed (not recommended for day-to-day use). For more information, see Log on to Latitude in the Cloud (Browser and Citrix Receiver Light).

To determine which method is available to you, contact your system administrator.
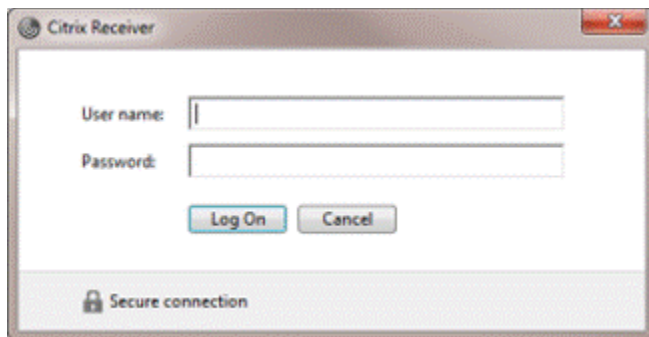
# Log on to Latitude in the Cloud (Desktop)

If this method is available to you, you can log on to the Latitude in the Cloud service from your desktop. This method requires installation and activation of Citrix Receiver on your computer.
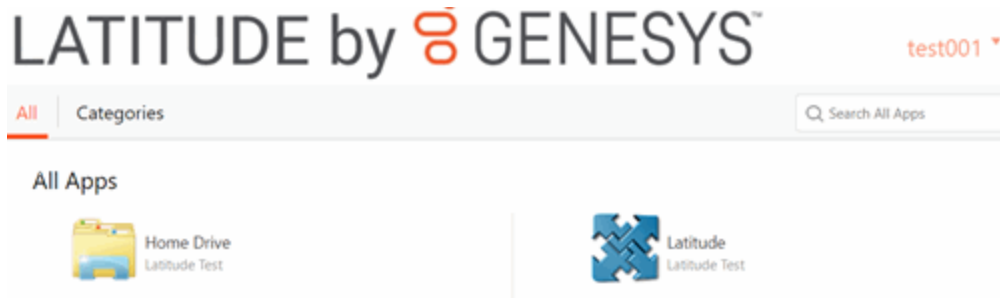
**To log on to Latitude in the Cloud from your desktop**

1. Do one of the following:

   - Click **Start** > **Citrix Receiver.**

   - In the notification area, click the Citrix Receiver icon .

   The **Citrix Receiver** dialog box appears.



2. Type your Citrix Receiver user name and password and then click **Log On**. The **LATITUDE by Genesys** page appears.
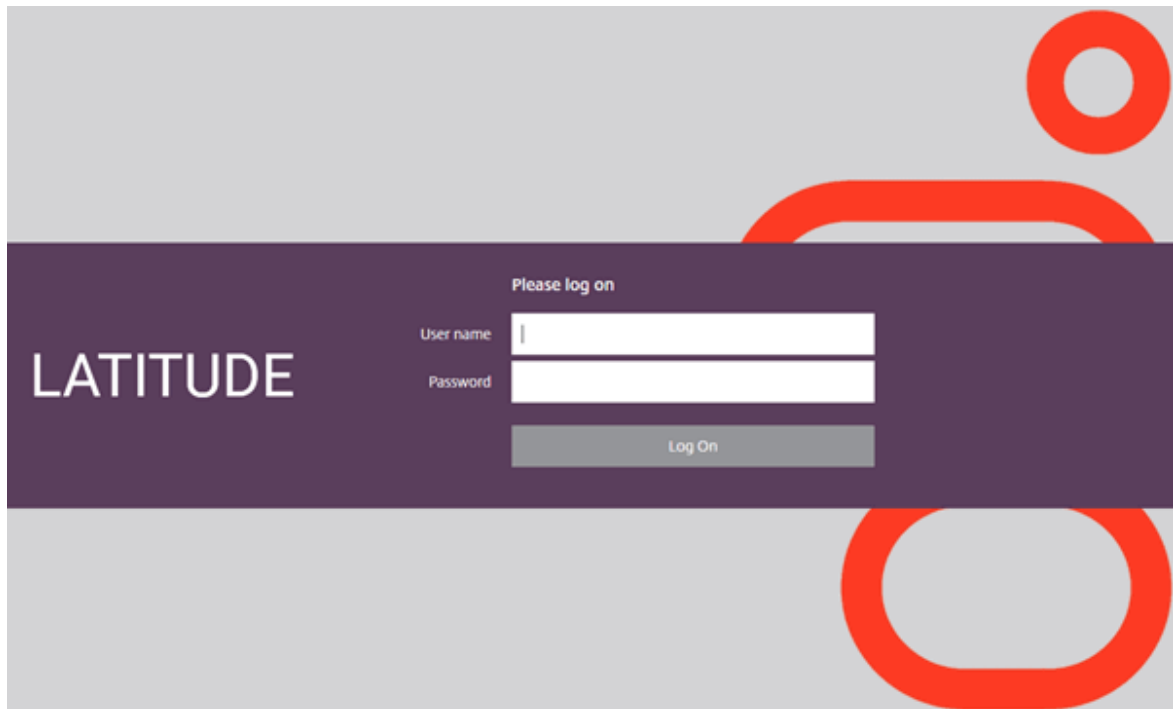
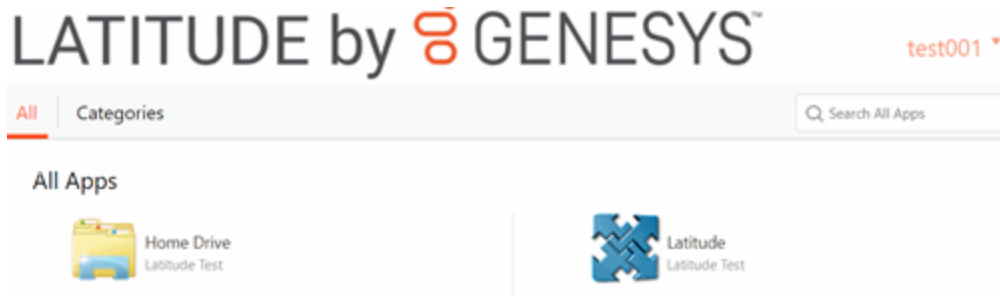## Log on to Latitude in the Cloud (Browser and Citrix Receiver)

If this method is available to you, you can log on to the Latitude in the Cloud service using your web browser. This method requires that you have Citrix Receiver installed on your computer.

**To log on to Latitude in the Cloud using a web browser and Citrix Receiver**

1. In your browser, type "**www.latitudebygenesys.com**" and then press **Enter**. The **LATITUDE** page appears.



2. Type your Citrix user name and password.

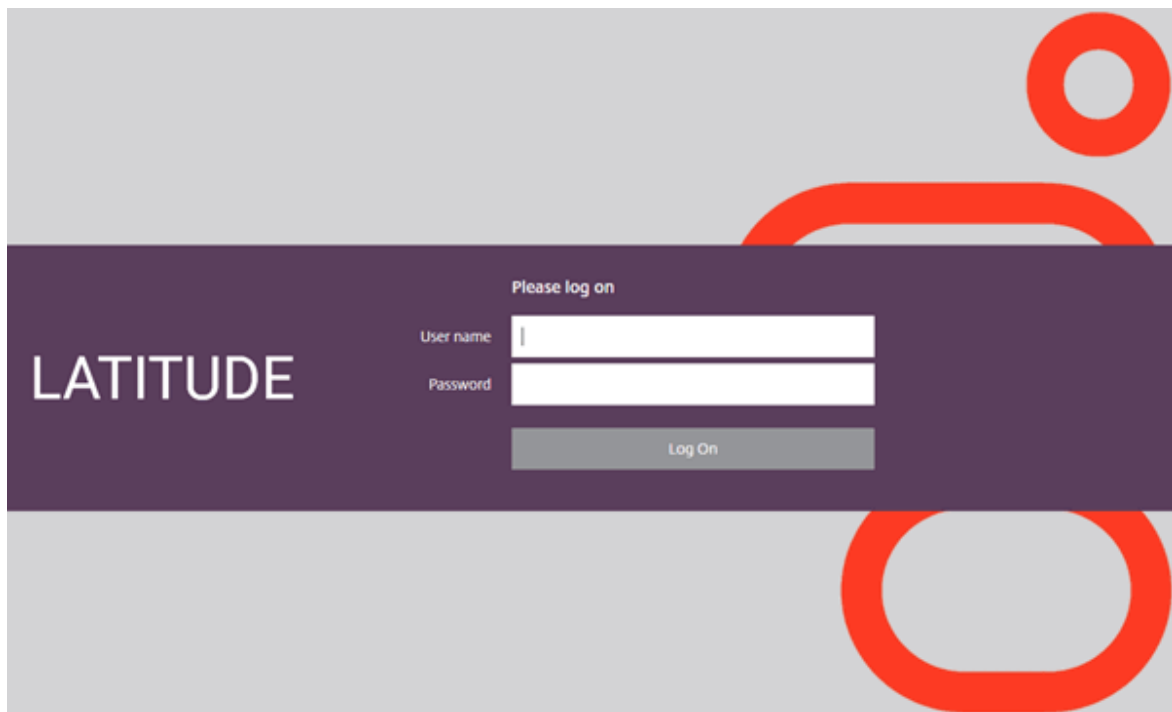3. Click **Log On**. The **LATITUDE by Genesys** page appears.

> **Note:** If you closed your browser when you logged off after your last session, the **Welcome to Receiver** page appears. Click **Install**. The **Citrix Receiver Detection** page appears. Wait for the system to detect that you have Citrix Receiver installed. Once detected, the **Citrix Receiver** page appears.

## Log on to Latitude in the Cloud (Browser and Citrix Receiver Light)

If this method is available to you, you can log on to the Latitude in the Cloud service using your web browser. This method requires that you have Citrix Receiver Light installed on your computer.

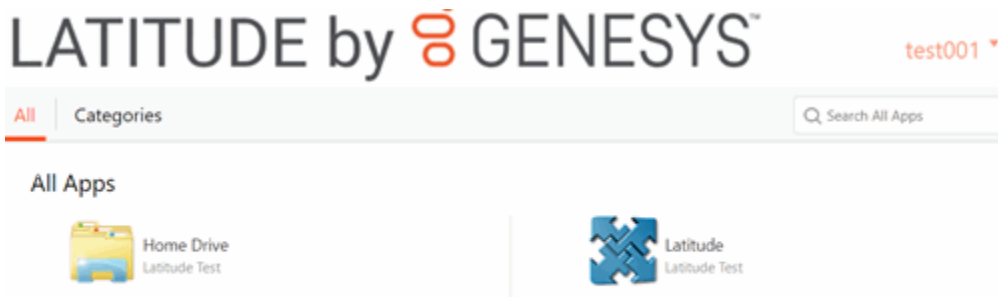**To log on to Latitude in the Cloud using a web browser and Citrix Receiver Light**

1. In your browser, type "**www.latitudebygenesys.com**" and then press **Enter**. The **LATITUDE** page appears.



2. Type your Citrix user name and password.

3. Click **Log On**. The **Welcome to Receiver** page appears.
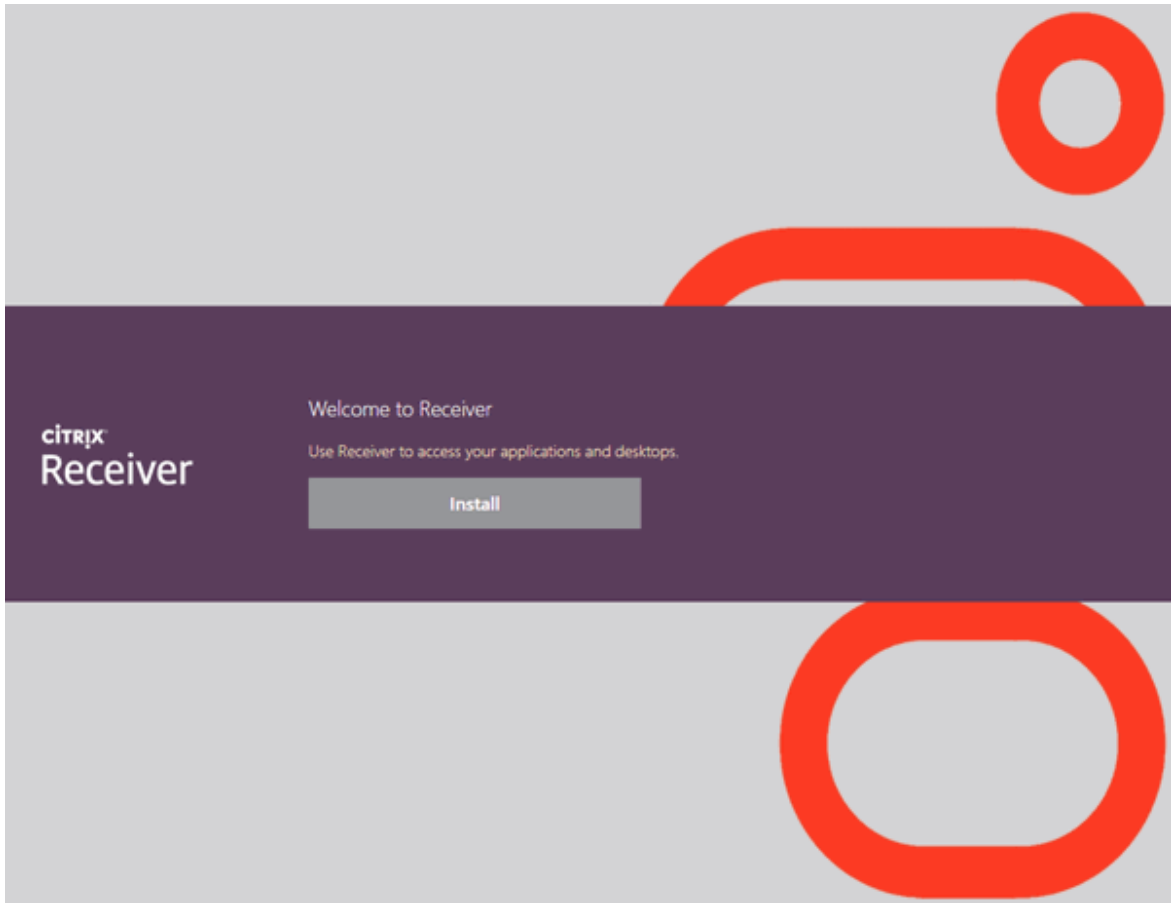
4. Click **Use light version**. The **LATITUDE by Genesys** page appears.
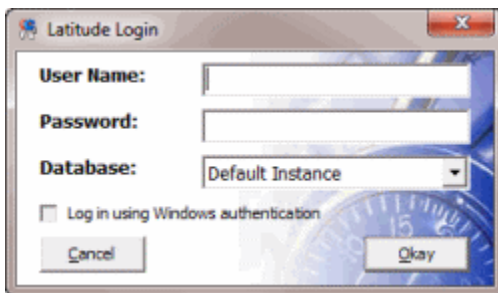


# Log on to a Latitude Application

You can log on to a Latitude application that is available to you through the Latitude in the Cloud service.

**To log on to a Latitude application**

1. Log on to the Latitude in the Cloud service using the method available to you. For more information, see Latitude in the Cloud Access. The **LATITUDE by Genesys** page appears.
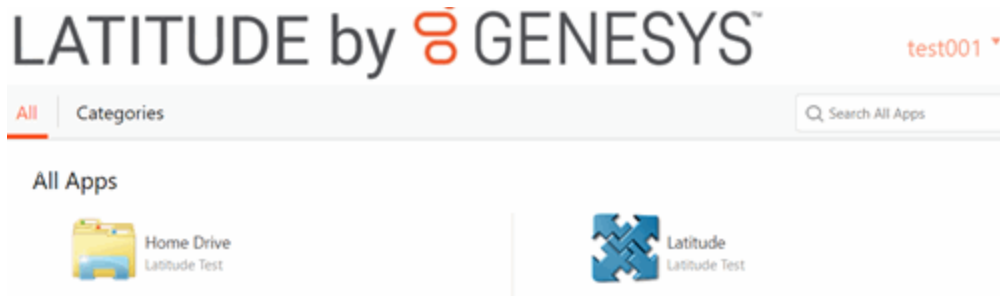
2. To view the applications available to you, do one of the following:

   - To view applications by category, click the **Categories** tab.

   - To view all applications, click the **All** tab.

3. To open a Latitude application, click the corresponding icon or application name. The **Latitude Login** dialog box opens.



4. Provide your Latitude logon credentials and then click **Okay**. The main window for the application you selected appears.

> **Note:** For more information about logging on to and using a Latitude application, see the associated Latitude documentation.

## Share Files With Latitude in the Cloud

The Home Drive is a location in the AWS environment that allows you to share files on your local computer, network, or other media (for example, thumb drive) with Latitude in the Cloud. For example, you can copy files from your local computer, network, or other media (for example, thumb drive) to the Home Drive and import them into a Latitude application that has import functionality. You can also copy files from the Home Drive to your local computer, network, or other media.

Some Latitude applications save or download files to your local computer instead of the Home Drive (for example, letter templates). When saving or downloading files, note the location so that you know where to find them.

> **Important!**
> Genesys strongly recommends that you don't use the Home Drive as the primary location for your files. The system doesn't back up the Home Drive and cannot recover any lost or corrupt files.
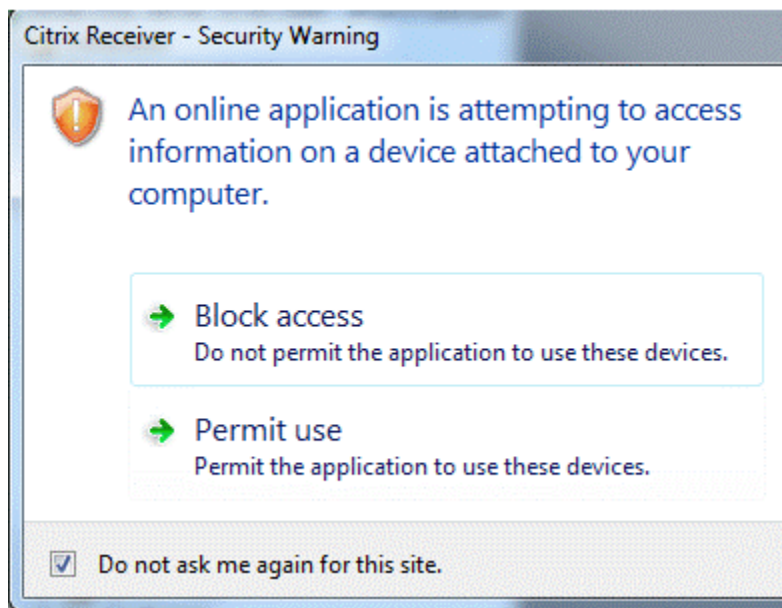
**To share files with Latitude in the Cloud**

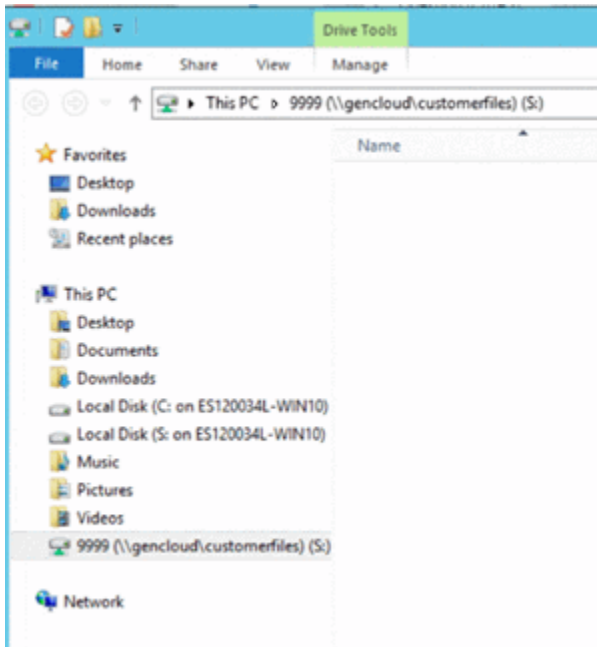1. Open **LATITUDE by Genesys** on your desktop or in your web browser.
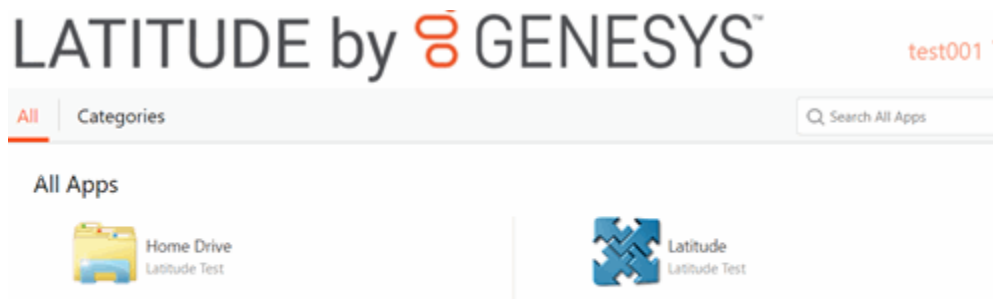


2. Click **Home Drive**.

   If it's your first time clicking this option, the **Citrix Receiver - Security Warning** dialog box appears. Click **Permit use**.



   The **File Explorer** window opens to the S: drive, which is the Home Drive.

3. To copy files to the Home Drive, do the following:

    a. On your C: drive; network; or other media, locate the files to copy.

    b. Click one or more files to copy and then do one of the following:

        • Drag and drop the files to the S: drive.

        • Right-click the selected files and then click **Copy**. Right-click on the S: drive and then click **Paste**.

4. To copy files from the Home Drive, do the following:

    a. On the Home Drive, locate the files to copy.

    b. Click one or more files to copy and then do one of the following:

        • Drag and drop the files to your C: drive, network location, or other media.

        • Right-click the selected files and then click **Copy**. Right-click on the S: drive and then click **Paste**.

## Citrix Receiver Tasks

The following tasks are available for managing your Citrix Receiver account:

• Change Your Citrix Receiver Password

• Delete Your Saved Citrix Receiver Passwords

• Specify File Access Method

• Remove a Citrix Receiver Account

• Add a Citrix Receiver Account

## Change Your Citrix Receiver Password

Citrix Receiver passwords have the following requirements:

- At least 8 characters

- At least 3 different character types (for example, uppercase (A, B…Z); lowercase (a, b…z); number (1, 2…0); and symbol (!@#%^)

- Not based on or similar to your user name

- Not one of the last 24 passwords that you created

- At least 1 day old before you can change it
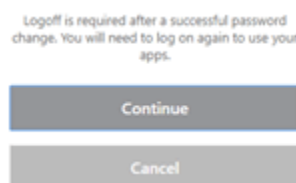
**To change your Citrix Receiver password**

1. Open **LATITUDE by Genesys** on your desktop or in your web browser.
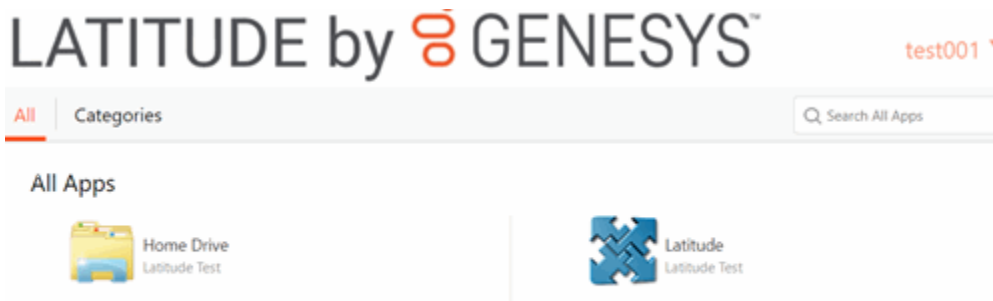


2. In the menu bar, click your user name. A list of options appears.
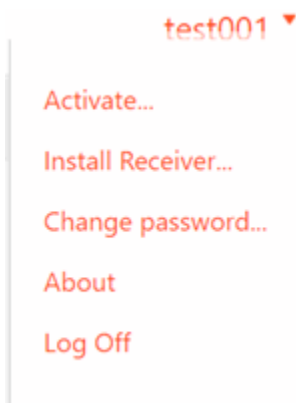


3. Click **Change Password…** A message appears, indicating that Citrix Receiver requires you to log off and back on after changing your password.

4.  Click **Continue**. The **Change Password** dialog box appears.



5.  In the **Old password** box, type your current password.

6.  In the **New password** box, type your new password.

7.  In the **Confirm password** box, type your new password again and then click **OK**.

8.  Log off Citrix Receiver and log on again using your new password.

> **Note:** If you need to reset your password and you don't have the Password Reset Tool, contact your system administrator or Latitude by Genesys Support.

## Delete Your Saved Citrix Receiver Passwords

You can delete your saved Citrix Receiver user name and password so that the system asks you for your credentials the next time that you log on to Citrix Receiver. This action does not delete your Citrix Receiver account, only your saved credentials.

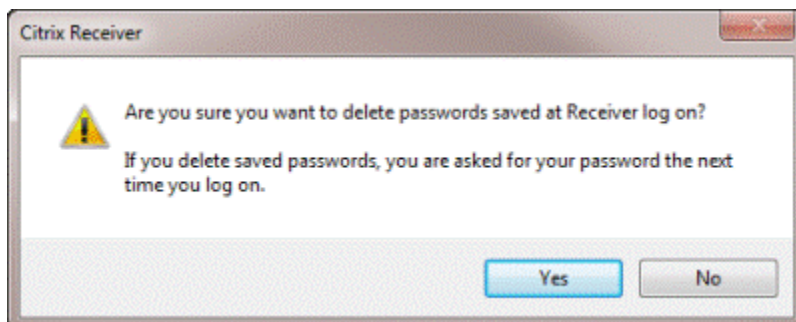**To delete your saved Citrix Receiver passwords**

1.  In the notification area, right-click the Citrix Receiver icon . A menu appears.
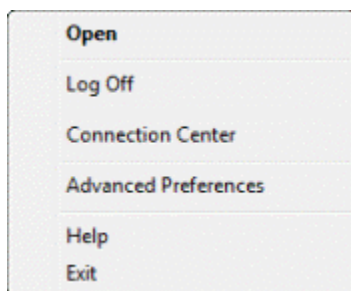


2.  Click **Advanced Preferences**. The **Advanced Preferences** window appears.
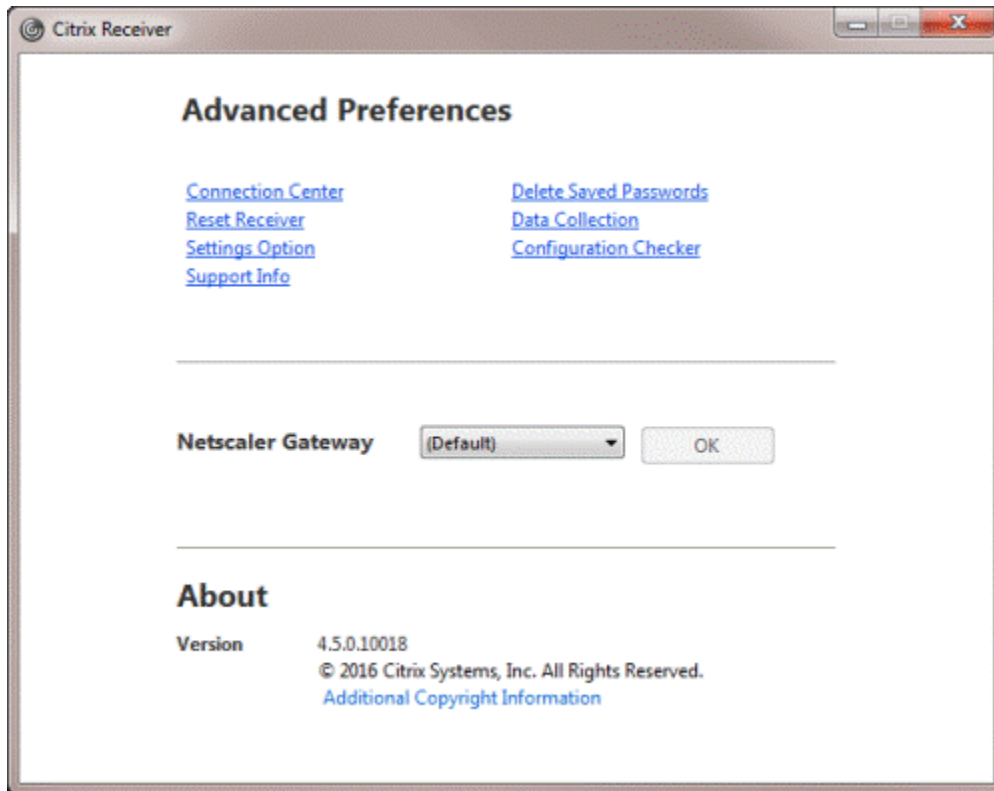
3.  Click **Delete Saved Passwords**. A confirmation dialog box appears.



4.  Click **Yes**. The system deletes your saved user name and password.
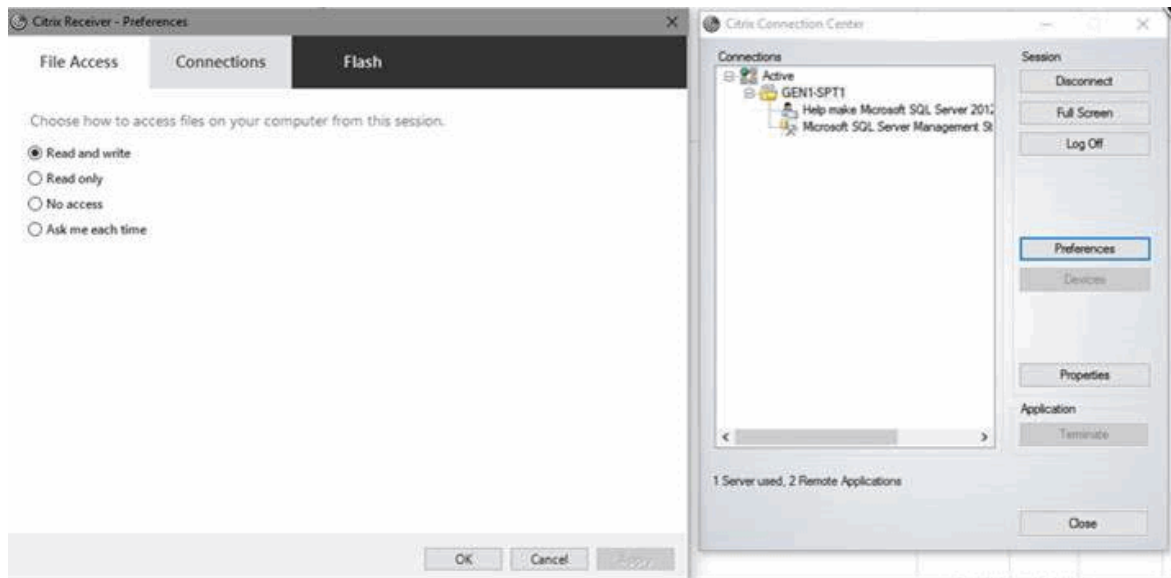
## Specify File Access Method

You can specify how to access files on your local computer during your current Citrix Receiver session.

**To specify a file access method**

1.  In the notification area, right-click the Citrix Receiver icon . A menu appears.
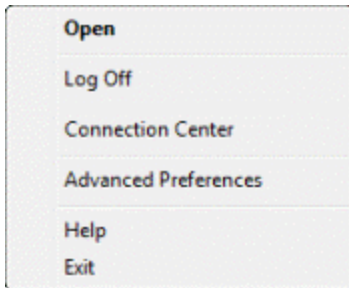
2. Click **Connection Center**. The **Citrix Receiver - Preferences** window appears.



**Read and write:** If selected, you can read from and write to files on your local computer during this Citrix Receiver session.

**Read only:** If selected, you can only read from files on your local computer during this Citrix Receiver session.

**No access:** If selected, you cannot read from or write to files on your local computer during this Citrix Receiver session.

**Ask me each time:** If selected, Citrix Receiver asks you how to access files on your local computer each time you attempt to access the files during this Citrix Receiver session. When using this option, Citrix Receiver displays the following dialog box:
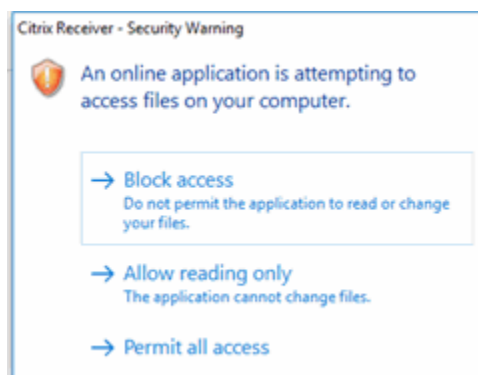
3. On the **File Access** tab in the **Citrix Receiver - Preferences** window, click an option and then click **OK**.
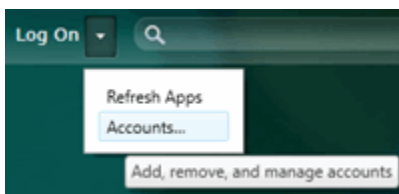
## Remove a Citrix Receiver Account

If you have more than one Citrix Receiver account and you cannot log on to your Latitude account using your Latitude credentials, you can remove your Latitude account and then re-add it.

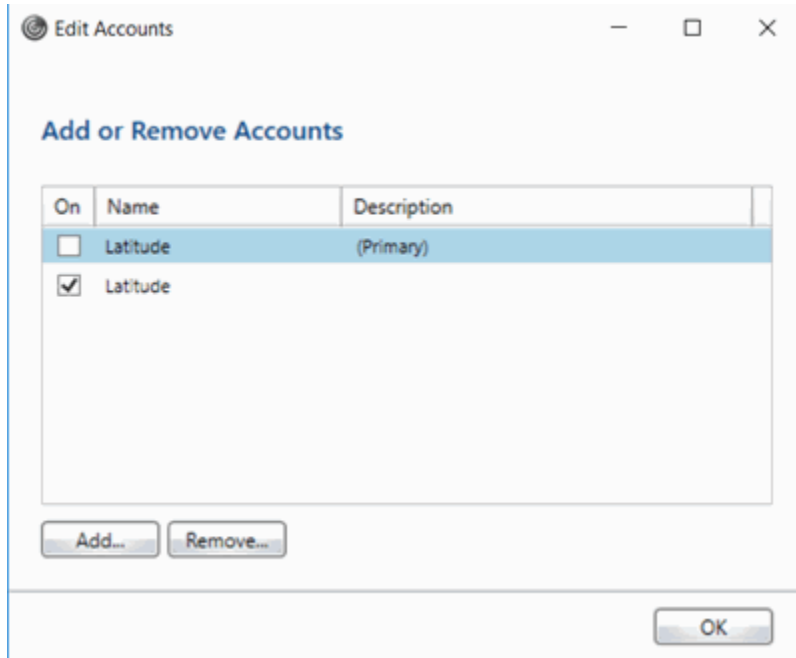**To remove a Citrix Receiver account**

1. In the notification area, right-click the Citrix Receiver icon  and then click **Open**. The **Citrix Receiver** window appears.
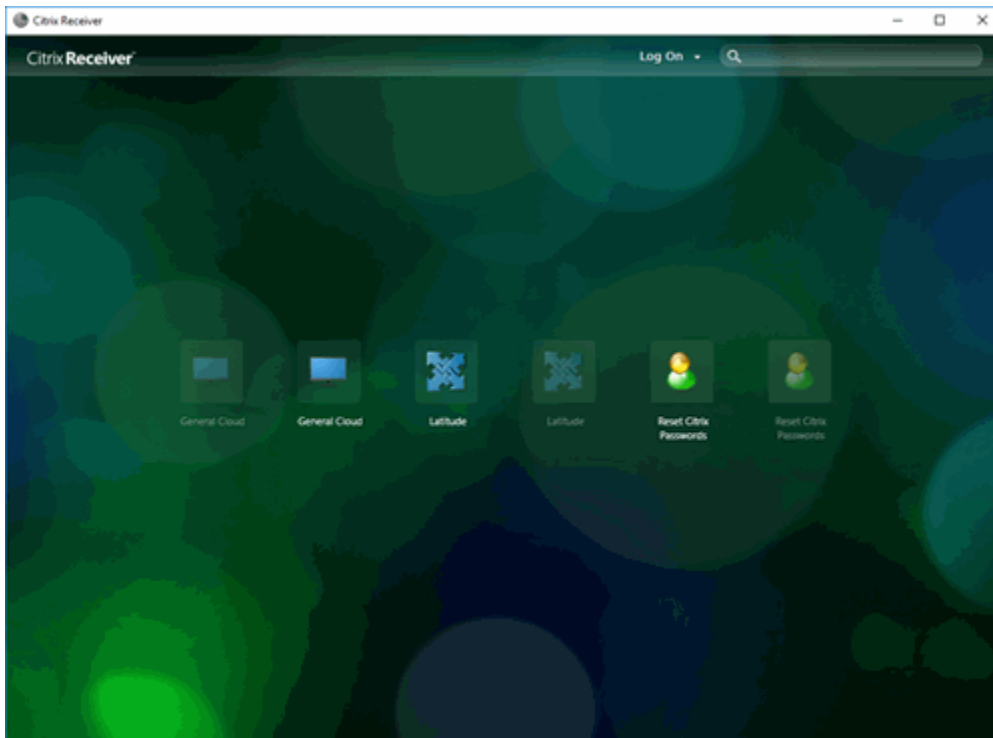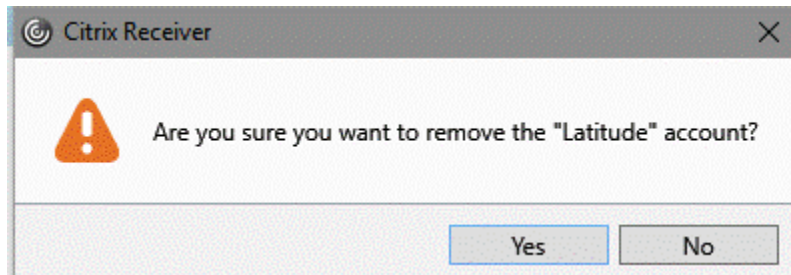


2. In the menu bar, click the **Log On** list box arrow. A list of options appears.



3. Click **Accounts**. The **Edit Accounts** dialog box appears.

4. Select the check box for the account to remove and then click **Remove**. A confirmation dialog box appears.



5. Click **Yes**. Citrix Receiver removes the Latitude account.

6. In the **Edit Accounts** dialog box, click **OK**. The **Edit Accounts** dialog box closes.
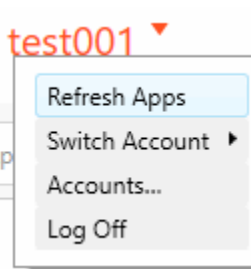
## Add a Citrix Receiver Account

If you removed your Latitude account from Citrix Receiver, complete these steps to re-add it.

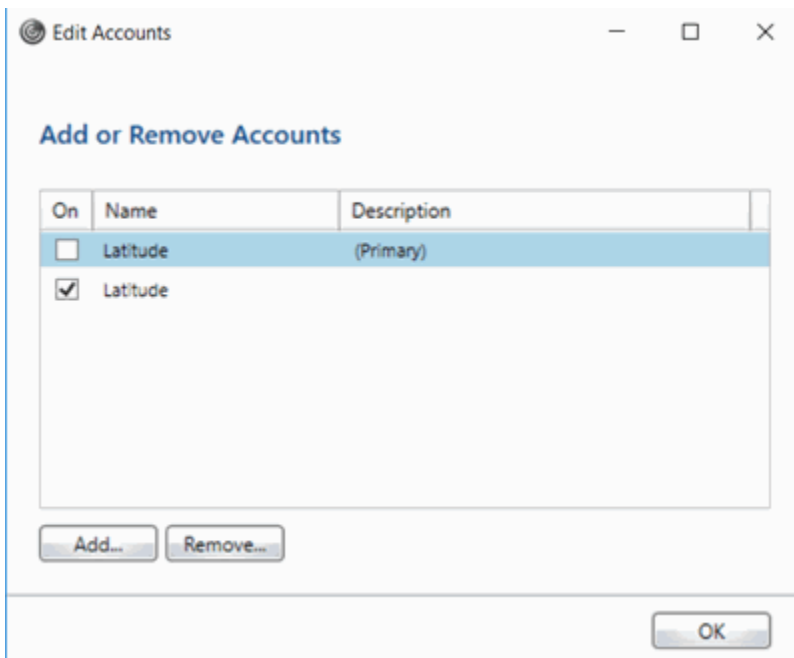**To add a Citrix Receiver account**

1. In the system tray, right-click the Citrix Receiver icon  and then click **Open**. The **Citrix Receiver** window appears.
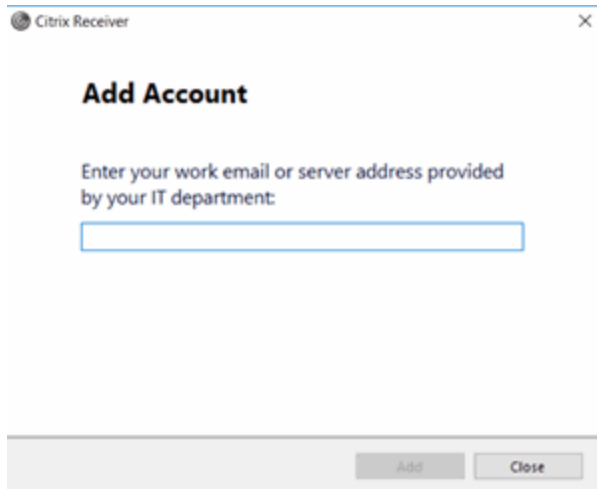
2. In the menu bar, click your user name. A list of options appears.



3. Click **Accounts**. The **Edit Accounts** dialog box appears.



4. Click **Add**. The **Add Account** dialog box appears.

5.  In the box, type your email or server address and then click **Add**. Citrix Receiver adds the account.

## Close Your Citrix Receiver Session

To close your Citrix Receiver session, log off all open Latitude applications and then log off your Citrix Receiver session.

**To close your Citrix Receiver session**

1.  Log off all open Latitude applications.

2.  On the **LATITUDE by Genesys** page, in the menu bar, click your user name. A list of options appears.
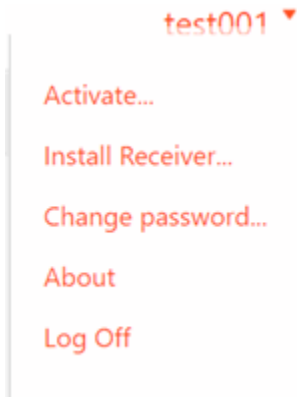


3.  Click **Log Off**. If you logged on using a web browser, close the browser window.

## Change Log

The following table lists the changes to the *Latitude in the Cloud User's Guide* since its initial release.

| Date | Change |
|---|---|
| 11-July-2019 | Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section...". |
|  |  |
|  |  |