



Archive and Restore Tools

Printable Help

Version 2024 R1

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Abstract

This document is a printable version of the Archive Configuration Tool, Archive Tool, and Restore Tool help.

For copyright and trademark information, see https://help.genesys.com/latitude/Liquid/Desktop/Copyright_and_Trademark_Information.htm.

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Introduction to the Archive Configuration, Archive, and Restore Tools

The **Archive Configuration Tool** allows you to configure the system for archiving account data. Configuration includes specifying the archive server, archive database, and which tables a user can archive, view, and purge. Configure the system before attempting to archive or restore account data.

The **Archive Tool** allows you to archive account data to increase performance in your production database by removing most of the data for older, returned accounts. Archiving moves most account data from your Latitude database to an archive database that you or a Latitude by Genesys representative created. The system doesn't archive all data it uses some data to open the account in the **Work Form** and some data for financial accounting.

We recommend that you store the archive database on a different server than your Latitude database to increase performance on the production server. Since the archived data is rarely used, you can store it on a server with lower performance requirements, which can result in lowered data storage costs. If your company uses more than one production database, set up a separate archive database for each production database.

The **Restore Tool** allows you to restore archived account data. Restoring moves account data from the archive database to your Latitude database. Once you restore account data, you can view it as you normally would in the **Work Form** in Latitude.

Archive and restore permissions

The system requires the following permissions to allow you to archive and restore account data:

2. Access Archive/Restore Functionality
3. Enable Archive of Account Data

For more information about these permissions, see "Archive Permissions and Policies" in the *Latitude* documentation.

What's New in Archive Configuration, Archive, and Restore Tools

The following Service Updates (SU) introduced changes and enhancements in the Archive Configuration, Archive, and Restore Tools in 13.0:

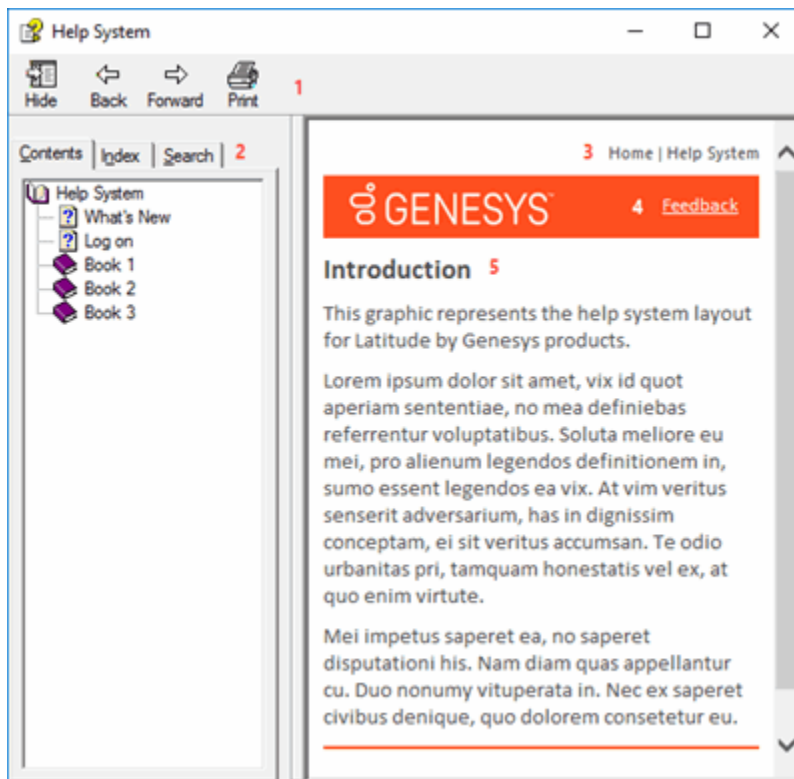
SU

Help Overview

Archive Configuration, Archive, and Restore Tools help provides you with information for using the Archive Configuration, Archive, and Restore Tools. To locate and view a topic, use the table of contents, index, and search features.

To open help

Open the "\\Program Files (x86)\Interactive Intelligence\Interaction Collector\Documents" folder and then double-click **ArchiveAndRestore.chm**.



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.

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

4. **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.

4. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.
5. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.
6. **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:

5. Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.
6. 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.
7. The search engine ignores punctuation marks and special characters such as @#\$%^&()=+[]\.
8. 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	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).

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character that can be anything, and ends in the specified characters		
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.

Related Topics

[Introduction to the Archive Configuration, Archive, and Restore Tools](#)

What's New in Archive Configuration, Archive, and Restore Tools

Archive Configuration Tool



[Feedback](#)

Archive Configuration Tool

Use the Archive Configuration Tool to specify the configuration for archiving account data.



[Feedback](#)

Log on to the Archive Configuration Tool

Use the **Latitude Login** dialog box to log on to the Archive Tool.

To log on to the Archive Tool

7. Click **Start > All Programs > Interactive Intelligence > Interaction Collector > Archive Tools > Archive Configuration Tool**. The **Latitude Login** dialog box appears.

A screenshot of the 'Latitude Login' dialog box. The dialog has a title bar with the text 'Latitude Login' and a close button. It contains three input fields: 'User Name:' with an empty text box, 'Password:' with an empty text box, and 'Database:' with a dropdown menu showing 'Default Instance'. Below these fields is a checkbox labeled 'Log in using Windows authentication' which is currently unchecked. At the bottom of the dialog are two buttons: 'Cancel' on the left and 'Okay' on the right.

1. In the **User Name** box, type your Latitude user name.
2. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.

Note: To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

2. Click **Okay**. The **Latitude Archive Configuration Utility** window appears.

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TableName	JoinColumn	ParentTable	ParentColumn	Archive	Viewable
master	number			<input type="checkbox"/>	<input type="checkbox"/>
debtors	number	master	number	<input type="checkbox"/>	<input type="checkbox"/>
Payhistory	number	master	number	<input type="checkbox"/>	<input type="checkbox"/>
notes	number	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
miscextra	number	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
extradata	number	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DebtorAttorneys	accountid	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DebtorBankInfo	acctid	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Garnishment	accountid	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PDC	number	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



[Feedback](#)

Specify Configuration for Archiving Account Data

Use the **Latitude Archive Configuration Utility** window to specify the configuration for archiving account data.

To specify configuration for archiving account data

4. Open the **Latitude Archive Configuration Utility** window.

TableName	JoinColumn	ParentTable	ParentColumn	Archive	Viewable
master	number			<input type="checkbox"/>	<input type="checkbox"/>
debtors	number	master	number	<input type="checkbox"/>	<input type="checkbox"/>
Payhistory	number	master	number	<input type="checkbox"/>	<input type="checkbox"/>
notes	number	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
miscextra	number	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
extradata	number	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DebtorAttorneys	accountid	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DebtorBankInfo	acctid	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Garnishment	accountid	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PDC	number	master	number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Archive Server: Server where the archive database resides.

Archive Database: Name of the database to store archived account data.

Archive User: User ID for accessing the archive database.

Archive Password: Password for accessing the archive database.

Archive: If selected, the system archives the data in the corresponding production table.

Viewable: If selected, you can view the archived data in the Archive Tool.

Archive: If selected, the system purges the data in the corresponding production table after archiving the data.

- Complete the information and then click **Update**.



[Feedback](#)

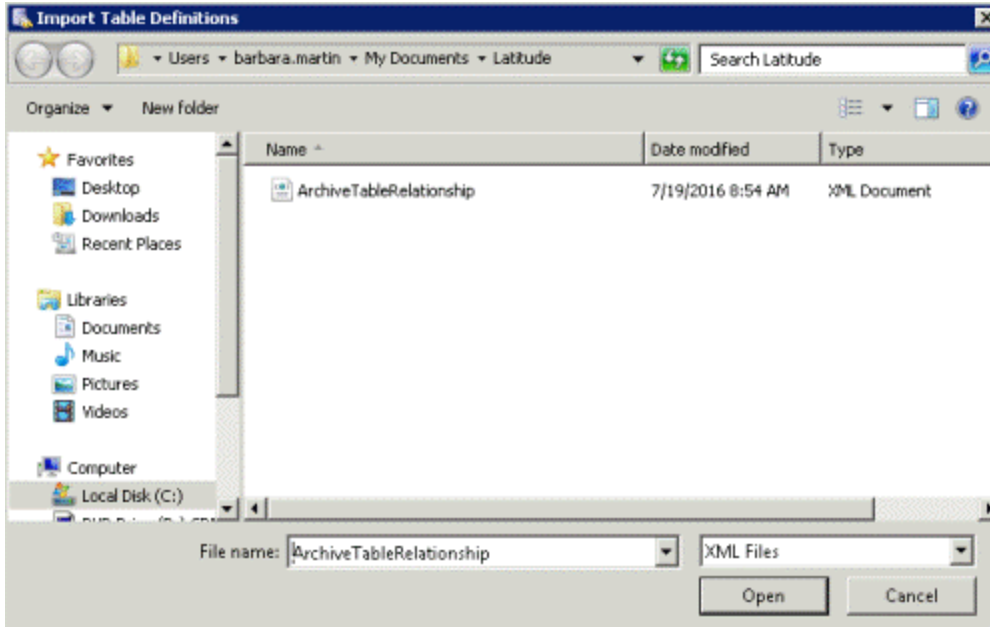
Import Table Definitions

Use the **Import Table Definitions** dialog box to import table definitions into the archive table. The import process overwrites the existing archive table definitions.

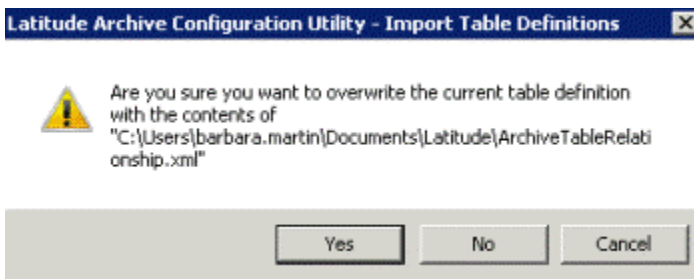
To import table definitions

5. In the **File** menu, click **Import Table Definitions**. The **Import Table Definitions** dialog box appears.

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1. In the **Name** column, click the name of the import file and then click **Open**. A confirmation dialog box appears.



2. Click **Yes**.



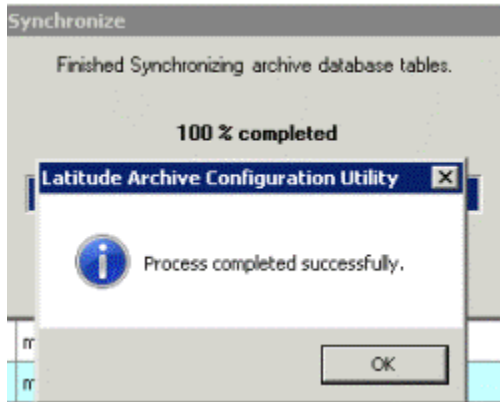
[Feedback](#)

Synchronize the Archive Schema

Use Synchronize Archive Schema feature to synchronize the production database schema to the archive database. Use this feature to ensure that your archive database has the latest changes to the production database.

To synchronize the archive schema

4. In the **File** menu, click **Synchronize Archive Schema**. A progress dialog box appears. When synchronization is complete, a notification dialog box appears.



5. Click **OK**.



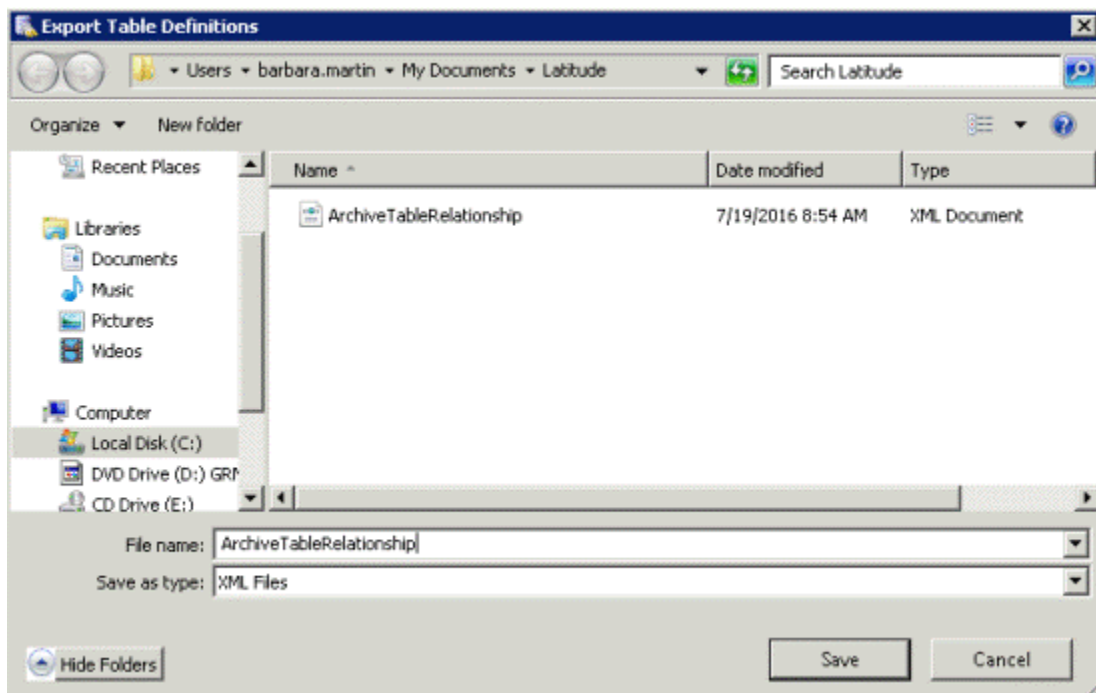
[Feedback](#)

Export Table Definitions

Use the **Export Table Definitions** dialog box to export the table definitions in the archive table.

To export table definitions

- In the **File** menu, click **Export Table Definitions**. The **Export Table Definitions** dialog box appears.



6. In the **File name** box, type a name for the export file and then click **Save**. The system exports the table definitions to the specified file.

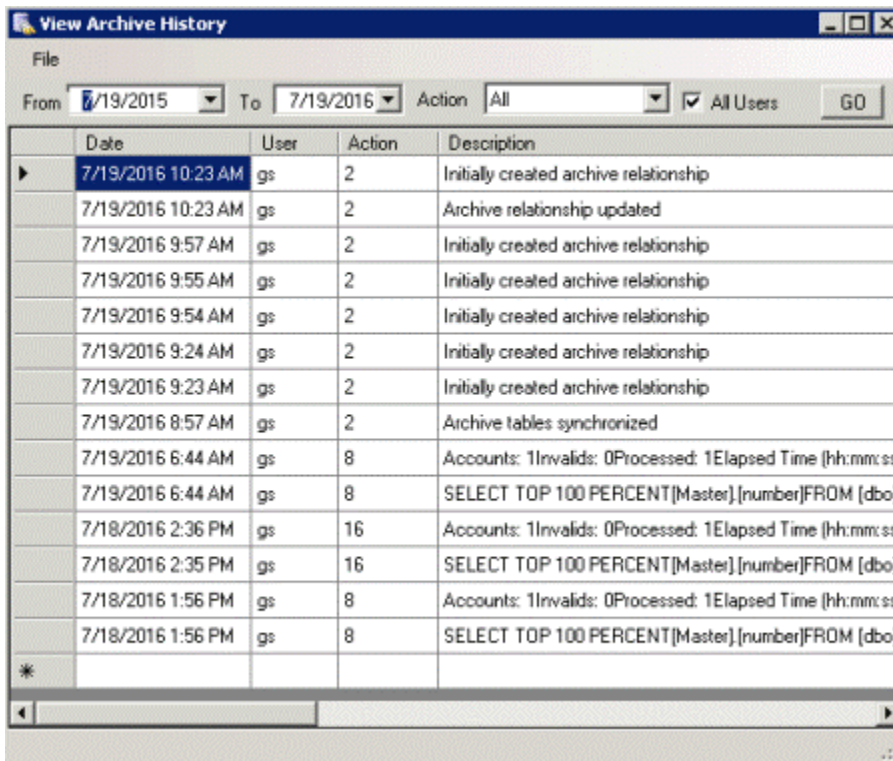


View Archive History

Use the **View Archive History** dialog box to view the history of archive actions, such as configuration changes and archiving of account data.

To view archive history

- In the **File** menu, click **View Archive History**. The **View Archive History** dialog box appears.



From: Start date for which to display information.

To: End date for which to display information.

Action: Action for which to display information.

All Users: If selected, displays information for all users. If cleared, displays information for the current user only.

- Complete the information and then click **GO**. The system displays the archive history for the specified criteria.

Archive Tool



[Feedback](#)

Archive Tool

Use the Archive Tool to archive data for accounts that you specify. Only accounts with a "999" queue level (returned) are eligible for archive.



[Feedback](#)

Log on to the Archive Tool

Use the **Latitude Login** dialog box to log on to the Archive Tool.

To log on to the Archive Tool

2. Click **Start > All Programs > Interactive Intelligence > Interaction Collector > Archive Tools > Archive Tool**. The **Latitude Login** dialog box appears.

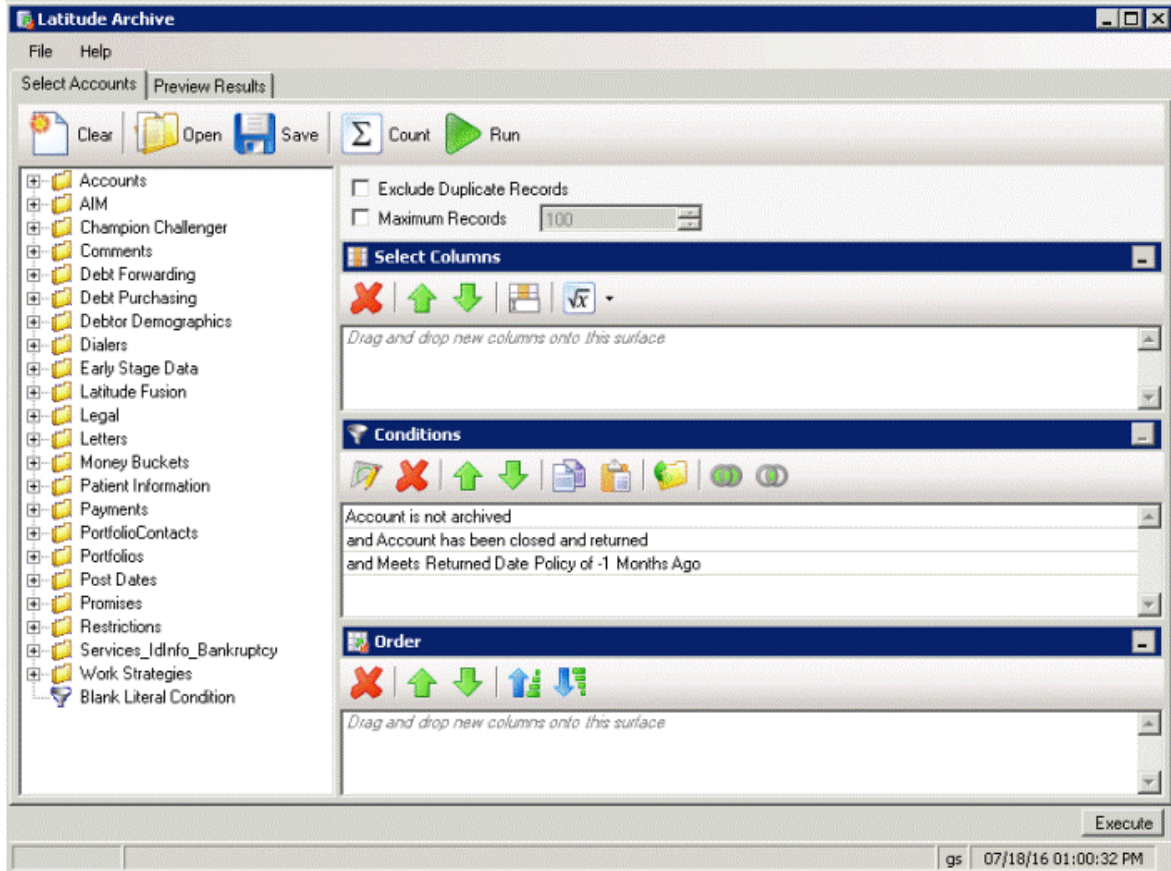
A screenshot of the 'Latitude Login' dialog box. It has a title bar with the text 'Latitude Login' and a close button. The dialog contains three input fields: 'User Name:' with an empty text box, 'Password:' with an empty text box, and 'Database:' with a dropdown menu showing 'Default Instance'. Below these fields is a checkbox labeled 'Log in using Windows authentication' which is currently unchecked. At the bottom of the dialog are two buttons: 'Cancel' on the left and 'Okay' on the right.

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.

Note: To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

4. Click **Okay**. The **Latitude Archive** window appears.

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[Feedback](#)

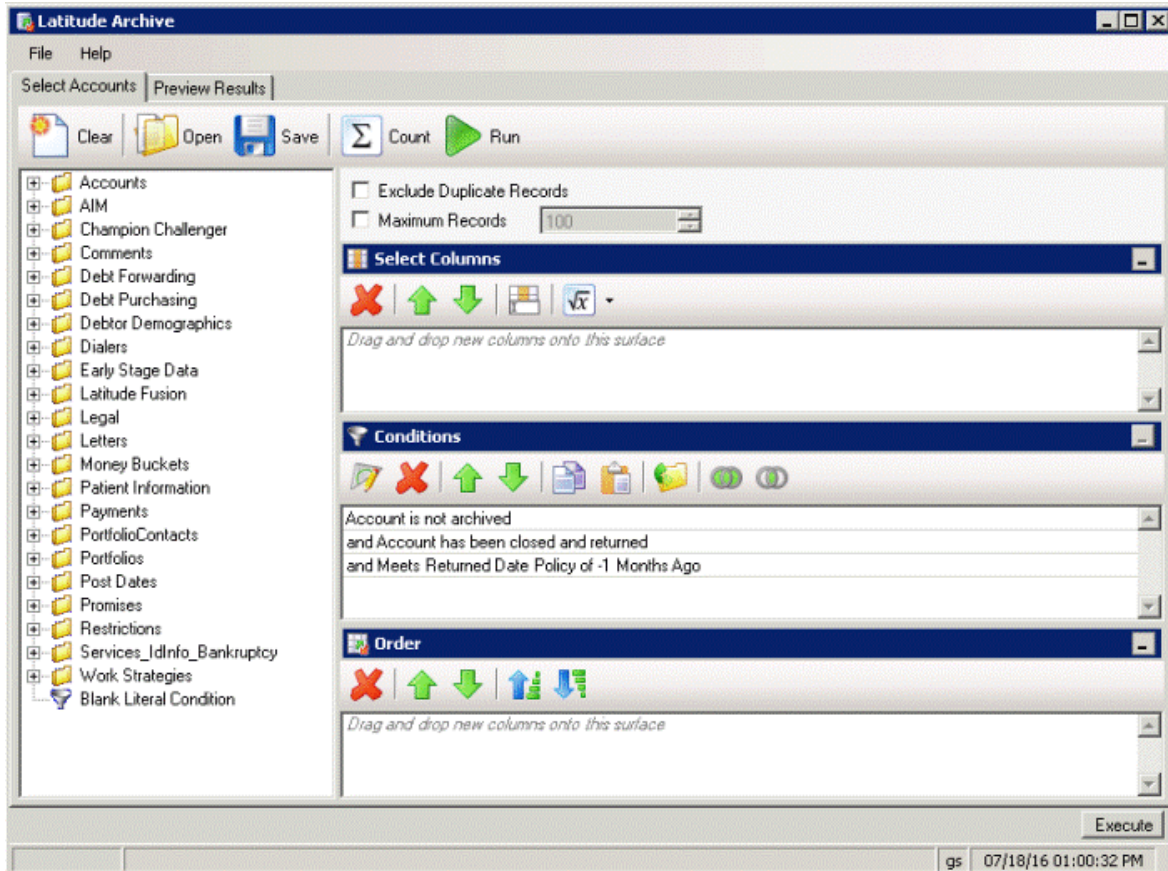
Select Accounts to Archive

Use the **Select Accounts** tab in the **Latitude Archive** window to select the accounts to archive.

Note: These instructions are for creating a query. You can also open an existing query to select accounts. For more information about working with queries, see "Queries" in the *Latitude* documentation.

To select accounts

5. In the **Latitude Archive** window, click the **Select Accounts** tab.

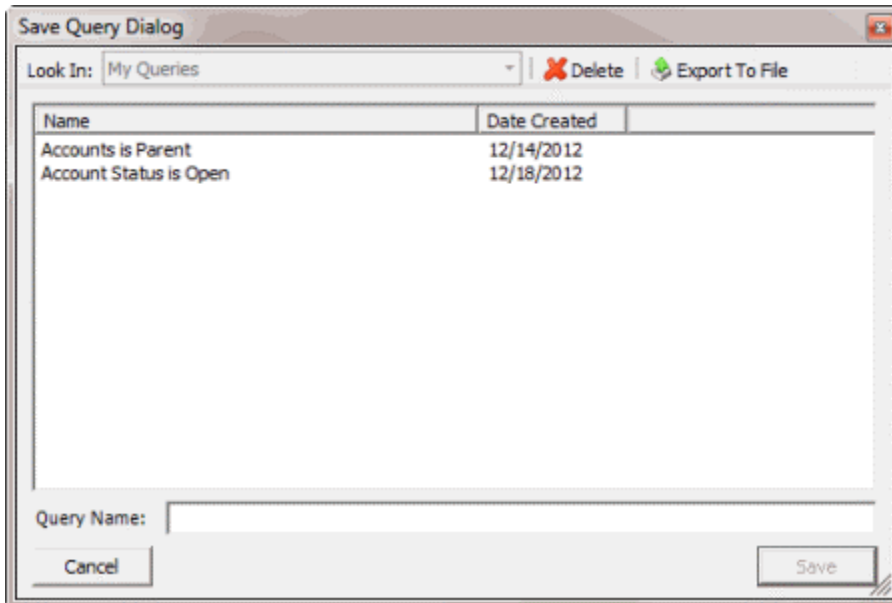


The system sets three conditions by default; however, you can delete them.

1. To exclude duplicate records from the query results, select **Exclude Duplicate Records**.
2. To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.
3. In the **Select Columns** pane, do the following as necessary to specify the data columns to include in the query results:
 1. Drag and drop one or more data items into the **Select Columns** pane.
 2. Arrange the order of the columns.
3. In the **Conditions** pane, do the following as necessary to specify the query conditions:
 1. Drag and drop one or more conditions into the **Conditions** pane.
 2. Arrange the order of the conditions.
 3. Group conditions for evaluation.
4. In the **Order** pane, do the following as necessary to specify the sort order for the data returned in the query results:
 1. Drag and drop one or more data items to use to sort the query results into the **Order** pane.
 2. Arrange the order of the data items.

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3. Click the data item and then click the Ascending or Descending icon.
2. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.
3. To save the query, do the following:
1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.



- In the **Query Name** box, type a name for the query and then click **Save**.

Tip: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

- Click **Run**. The query results appear on the **Preview Results** tab.



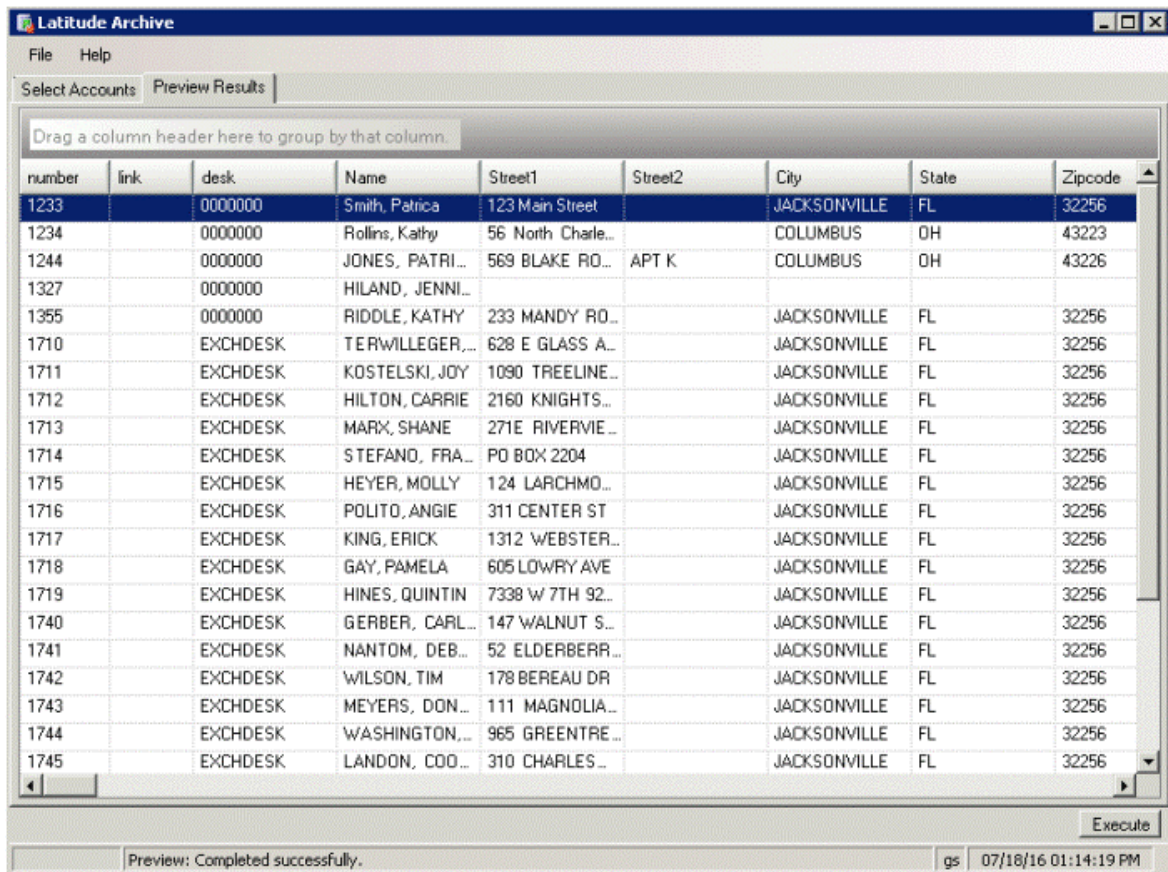
[Feedback](#)

Archive Account Data

Use the **Preview Results** tab in the **Latitude Archive** window to review the accounts selected for archive, and then archive the data for those accounts.

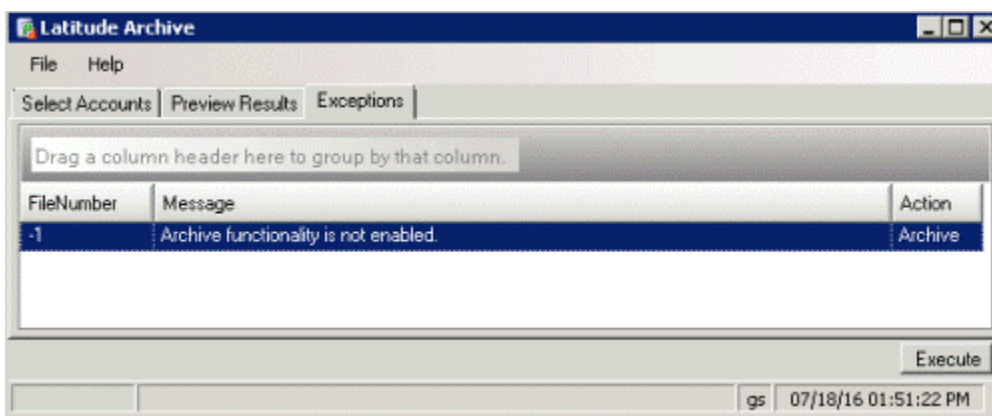
To archive account data

- After running a query, in the **Latitude Archive** window, click the **Preview Results** tab. The results appear in the data grid.



The columns that appear are based on the ones you specified when you selected accounts.

- Click **Execute**.
- In the confirmation dialog box, click **Yes**. The system archives data for the accounts and then displays a notification dialog box.
- Click **OK**.
- If errors occur during the archive, click the **Exceptions** tab.



Note: To print or save the exceptions to a file, use the **Print Exceptions** or **Save Exceptions** option in the **File** menu.

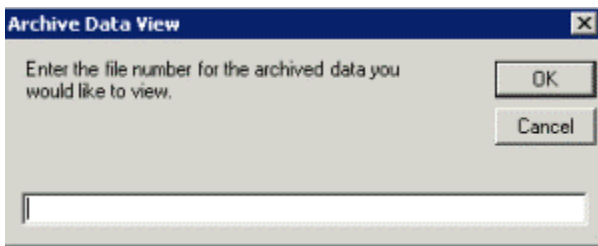


View Archived Data

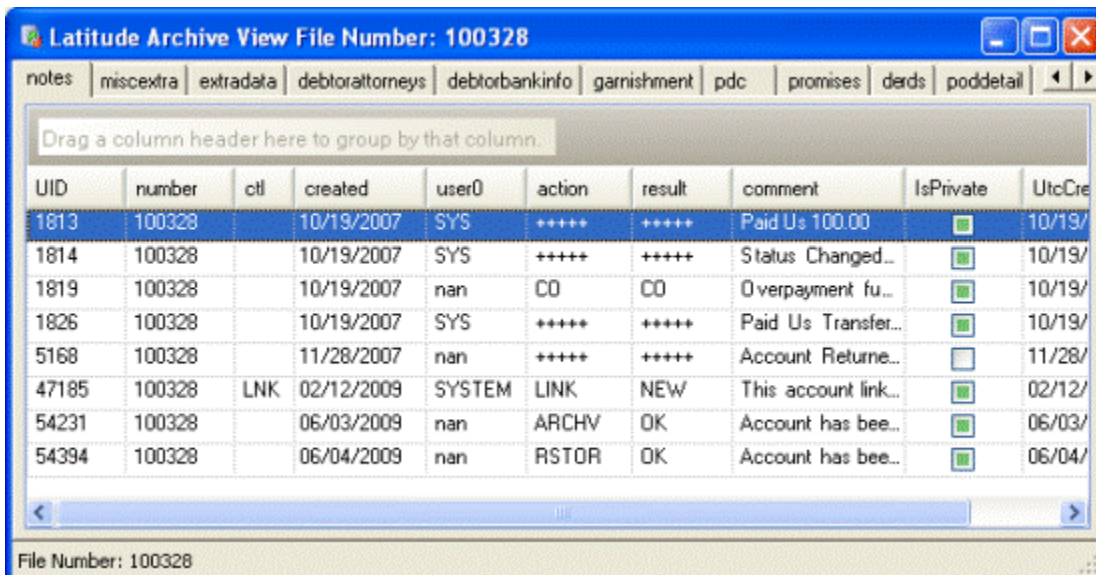
Use the **Latitude Archive View File Number** window to view archived data for an account.

To view archived data

- In the **File** menu, click **View Archived Data**. The **Archive Data View** dialog box appears.



1. In the box, type the file number of the account to view and then click **OK**.



1. Click the tabs to view the data.

Restore Tool



[Feedback](#)

Restore Tool

Use the Restore Tool to restore archived account data to your Latitude database.



[Feedback](#)

Log on to the Restore Tool

Use the **Latitude Login** dialog box to log on to the Restore Tool.

To log on to the Restore Tool

1. Click **Start > All Programs > Interactive Intelligence > Interaction Collector > Archive Tools > Restore Tool**. The **Latitude Login** dialog box appears.

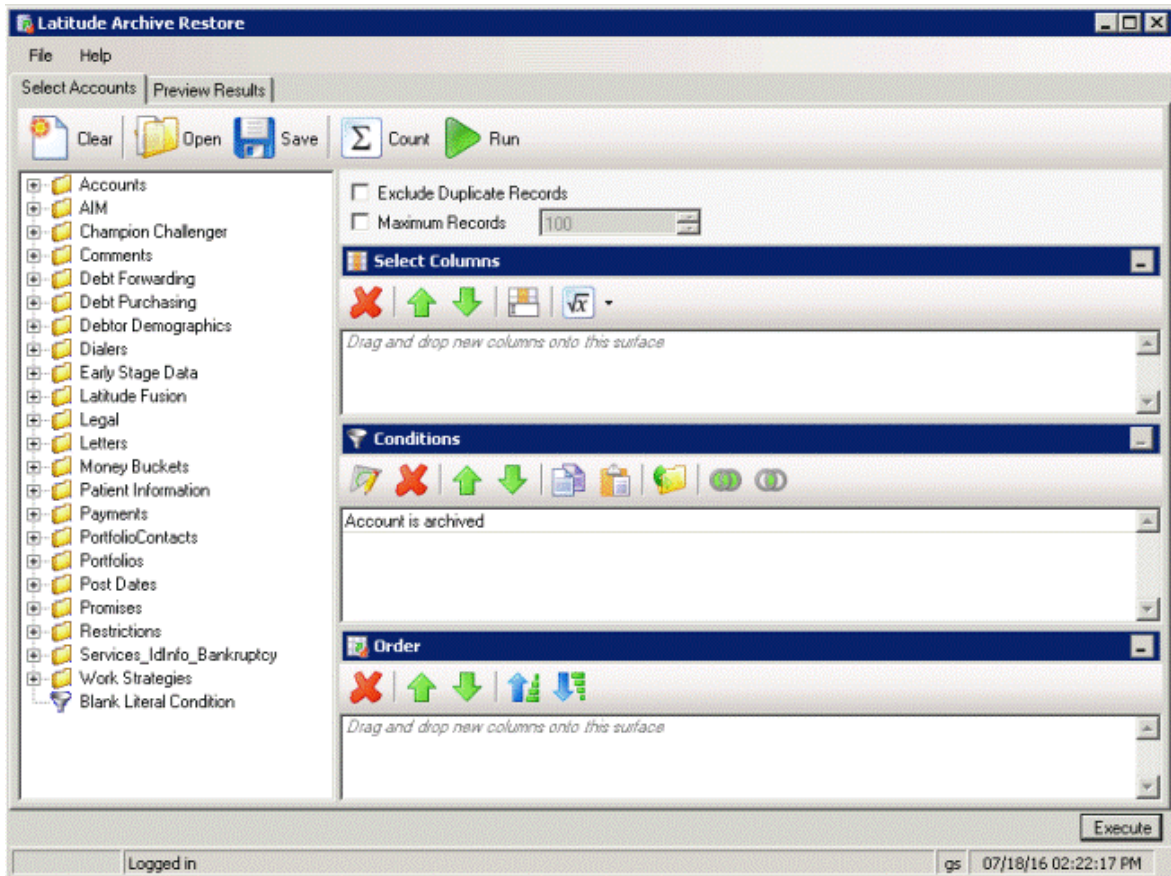
The screenshot shows a standard Windows-style dialog box titled "Latitude Login". It features three input fields: "User Name:" (a text box), "Password:" (a text box), and "Database:" (a dropdown menu currently showing "Default Instance"). Below these fields is a checkbox labeled "Log in using Windows authentication" which is currently unchecked. At the bottom of the dialog are two buttons: "Cancel" on the left and "Okay" on the right.

1. In the **User Name** box, type your Latitude user name.
2. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.

Note: To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

- a. Click **Okay**. The **Latitude Archive Restore** window appears.

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[Feedback](#)

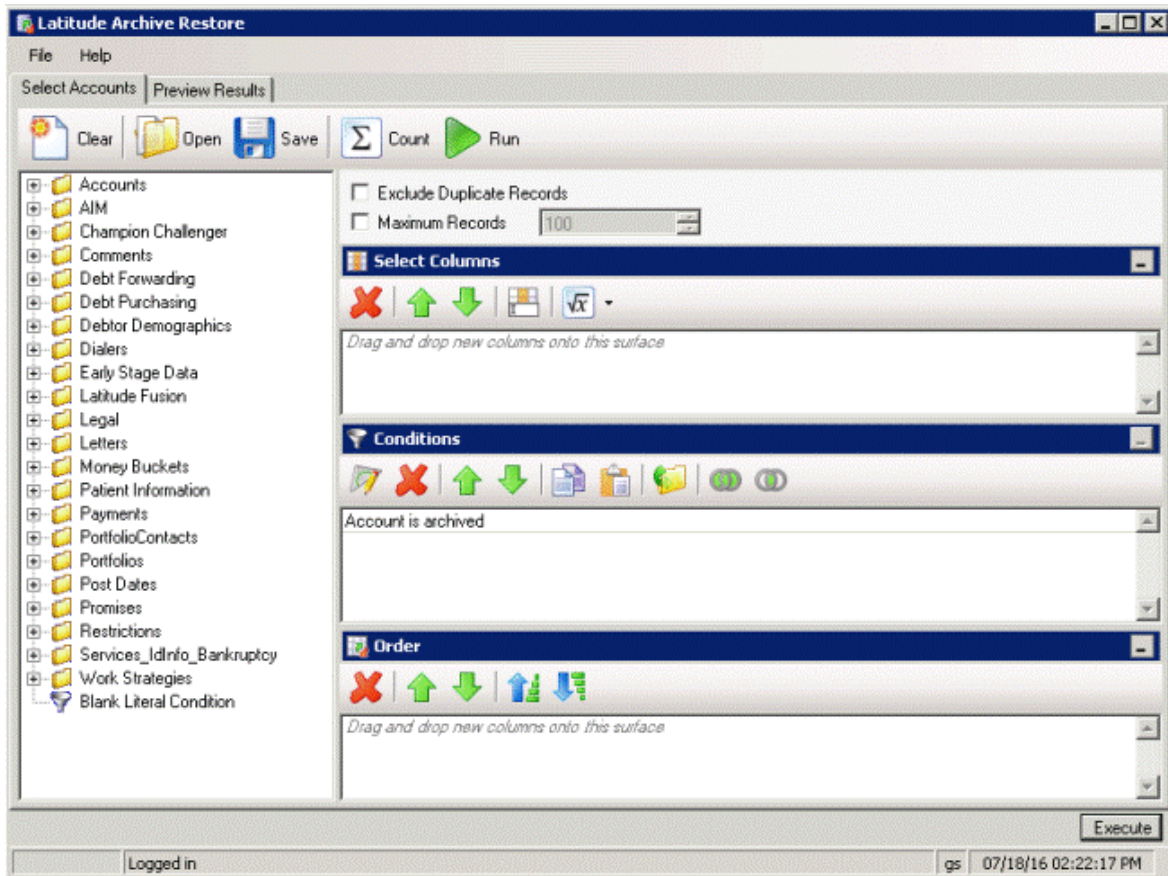
Select Accounts to Restore

Use the **Select Accounts** tab in the **Latitude Archive Restore** window to select the accounts to restore.

Note: These instructions are for creating a query. You can also open an existing query to select accounts. For more information about working with queries, see "Queries" in the *Latitude* documentation.

To select accounts

- In the **Latitude Archive Restore** window, click the **Select Accounts** tab.

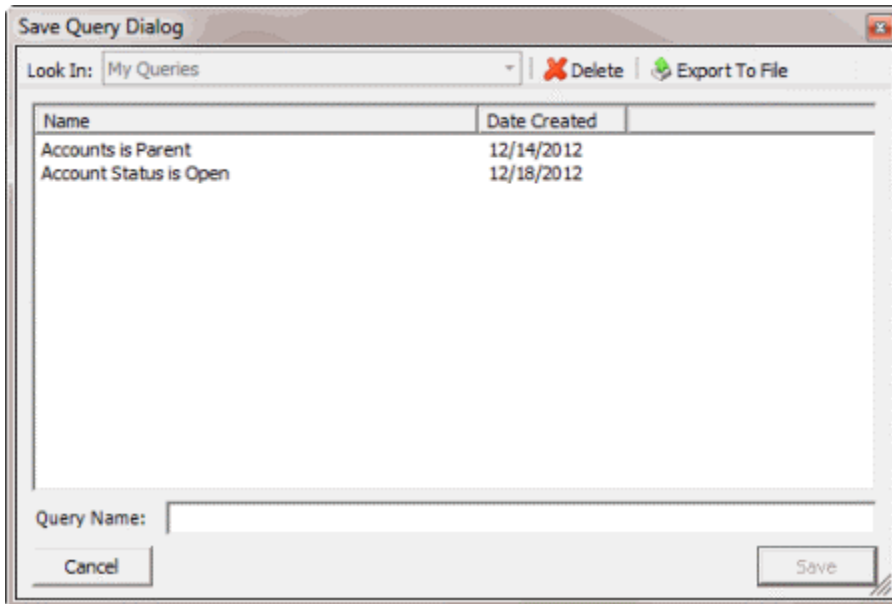


The system sets one condition by default.

- To exclude duplicate records from the query results, select **Exclude Duplicate Records**.
- To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.
- In the **Select Columns** pane, do the following as necessary to specify the data columns to include in the query results:
 - Drag and drop one or more data items into the **Select Columns** pane.
 - Arrange the order of the columns.
- In the **Conditions** pane, do the following as necessary to specify the query conditions:
 1. Drag and drop one or more conditions into the **Conditions** pane.
 2. Arrange the order of the conditions.
 3. Group conditions for evaluation.
- 1. In the **Order** pane, do the following as necessary to specify the sort order for the data returned in the query results:
 1. Drag and drop one or more data items to use to sort the query results into the **Order** pane.

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2. Arrange the order of the data items.
3. Click the data item and then click the Ascending or Descending icon.
1. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.
2. To save the query, do the following:
 1. In the toolbar, click **Save**. The **Save Query Dialog** box appears.



1. In the **Query Name** box, type a name for the query and then click **Save**.

Tip: To overwrite an existing query, in the **Name** column, click the query to overwrite and then click **Save**.

1. Click **Run**. The query results appear on the **Preview Results** tab.



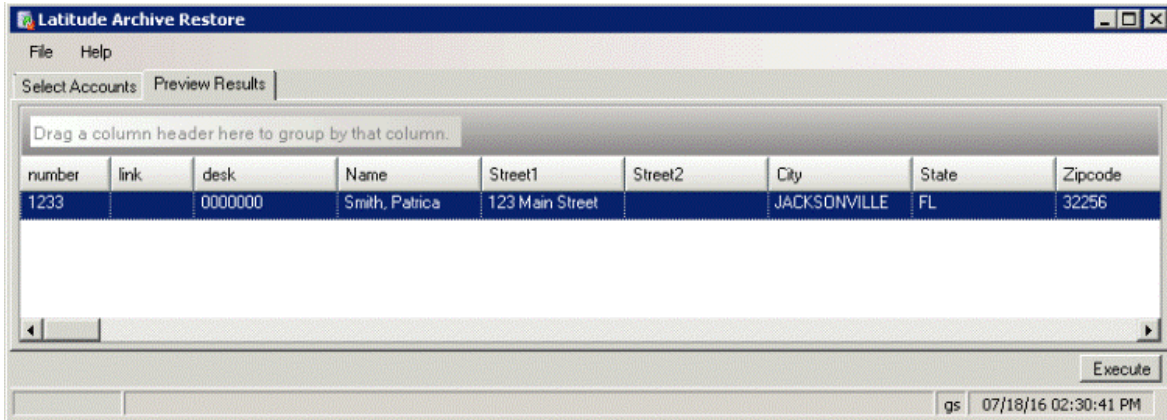
[Feedback](#)

Restore Archived Account Data

Use the **Preview Results** tab in the **Latitude Archive Restore** window to review the accounts selected for restoring, and then restore the data for those accounts.

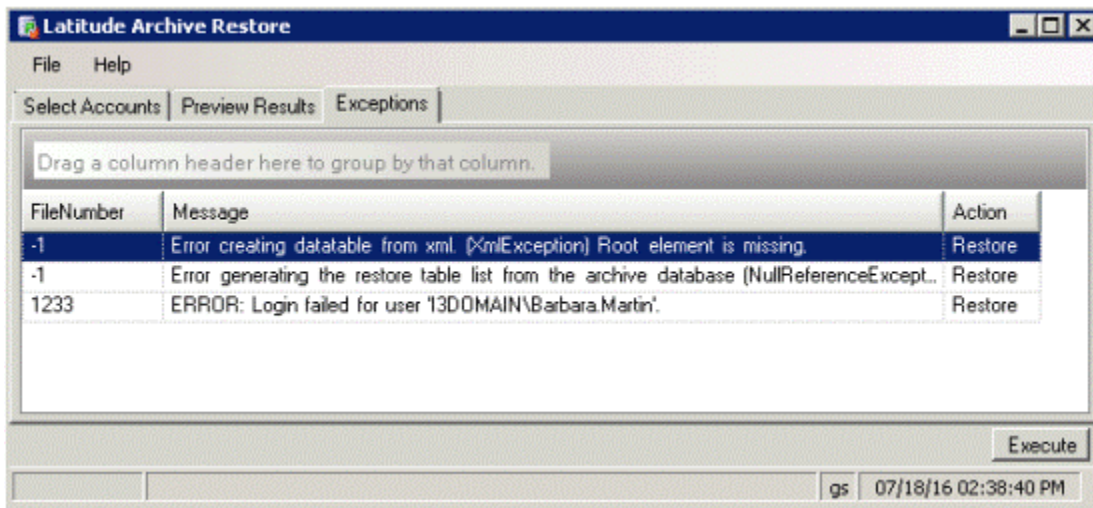
To restore archived account data

1. After running a query, in the **Latitude Archive Restore** window, click the **Preview Results** tab. The results appear in the data grid.



The columns that appear are based on the ones you specified when you selected accounts.

1. Click **Execute**.
2. In the confirmation dialog box, click **Yes**. The system restores archived data for the accounts and displays a notification dialog box.
3. Click **OK**.
4. If errors occur during the restore, click the **Exceptions** tab.



Note: To print or save the exceptions to a file, use the **Print Exceptions** or **Save Exceptions** option in the **File** menu.