

# Custodian Printable Help

Version 2023 R2

Last updated Nov 21, 2023

#### Abstract

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

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https://help.genesys.com/latitude/Liquid/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 <u>Task List</u>. For more information about the types of tasks you can create, see <u>Task Types</u>.

# **Log On to Custodian Editor**

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

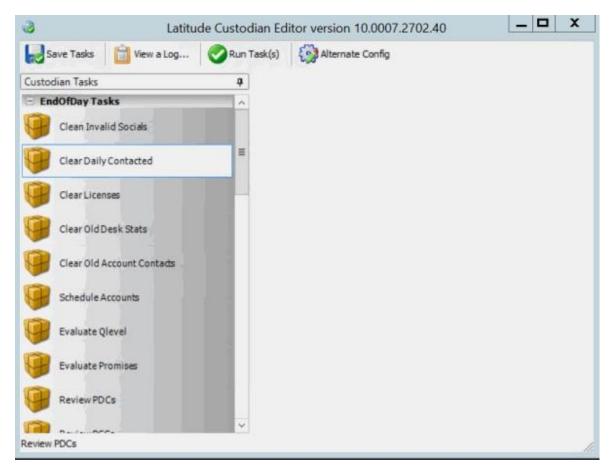
# log on to Custodian Editor

1. Open "\Program Files (x86)\Interactive Intelligence\Interaction Collector\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 "\Interactive Intelligence\Interaction Collector\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 <u>search feature</u>. 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 <u>set of rules</u>. You can include <u>wildcard expressions</u>, <u>Boolean operators</u>, and <u>nested expressions</u> 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). |

| Search for  | Example             | Result  |
|---|---------------------|---|
| Topics that contain all the words specified, in any order or placement within the topic | account<br>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<br>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<br>for | Example                | Result   |
|---------------|------------------------|--|
| AND           | account AND<br>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            | account OR<br>status   | Returns all topics with either account or status, or both.   |
| NOT           | account NOT<br>status  | Returns all topics with account but not status.  |
| INEAR         | account<br>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.

# **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  CustomQueue_BuildQueues.   |
| Calculate Interest                     | Calculates interest accrued on accounts. Calls stored procedure spinterest_Update.   |
|  | Note: The system no longer calls this stored procedure when displaying an account in the Work Form. If interest accumulates on accounts, it's possible that the current balance shown won't match the amount shown in the Arrangements panel. Therefore, you must run this task daily to ensure account balances are correct in the Work Form. |
| Cancel Arrangements on Closed Accounts | Cancels arrangements when all accounts in the arrangement are closed. Calls stored procedure spSetArrangementInactiveForClosedAccounts.  |
| Clean Invalid Socials                  | Removes invalid social security numbers from the master and debtor tables. Calls stored procedure spCleanInvalidSocials.   |
| Clear Daily Contacted                  | Removes old or erroneous records from the  Daily_Account_Contacted table. Calls stored procedure  spClearDailyContacted.   |
| Clear Licenses                         | Removes old or erroneous records from the <b>User License</b> table. Calls stored procedure <b>spClearLicenses</b> .   |

| Task | Description |
|------|-------------|

| Clear Old Account Contacts                   | Removes old account contact records from the AccountContacts table. Calls stored procedure spClearOldAccountContacts.   |
|--|---|
| 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 spCreateNitdLetterFromPostDatedChecks.  |
| 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 spCreateNitdLetterFromPostDatedCreditCards.   |
| Debtor Credit Bureau Compile                 | Issues a recompile before calling the bulk Credit Bureau Reporting evaluation process to improve performance. Calls stored procedure sp_recompile cbrevaluatebulk_nocursor.   |
| Debtor Credit Bureau Compile2                | Issues a recompile after calling the bulk Credit Bureau Reporting evaluation process to improve performance. Calls stored procedure sp_recompile cbrevaluatebulk_nocursor.  |
| 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 cbrEvaluate.   |
| 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 cbrForceDeletesByStatus. |

| Debtor Credit Bureau Force Disputes by<br>Status | • 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. |
|--|--|
|--|--|

| Task                                  | Description   |
|---------------------------------------|---|
|                                       | 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. |
|                                       | Run this task after running the Debtor Credit Bureau Evaluation task. Calls stored procedure cbrForceDisputesByStatus.  |
| 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 cbrResetCbrPrevent.   |
| Evaluate Collection Holds             | Evaluates collection hold and release events and dispositions the accounts or borrowers accordingly. Calls stored procedure <b>CollectionHoldUpdate</b> .   |
| Evaluate Qlevel                       | Evaluates the queue level and "should queue" flag on accounts and updates accounts accordingly. Calls stored procedure spEvaluateQLevelShouldQueue.   |
| Evaluate Scheduled Payments           | Evaluates the status of scheduled payments for promise payment types to determine whether the borrower kept or broke the promise. Calls stored procedure  ScheduledPaymentResultMerge.  |

| 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 expirations. Calls stored procedure spinterestDeferralAndSettlementOptions. |
|--|--|
| 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> .   |
| PlaceScheduledPmtsOnHoldForClosedAccts   | Places future scheduled payments on hold when an account closes.   |

| Task                             | Description  |
|----------------------------------|--|
|                                  | Calls stored procedure ScheduledPaymentsOnHoldForClosedAccounts.   |
| 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 spPurgeUserHistory. |
| Rehab Get Transactions           | Not used.  |
| Schedule Accounts                | Sets up night queues, custom queues, new business, NSFs, and broken promises. Assigns the appropriate queue level to accounts based on age. Calls stored procedure spScheduleAccounts.   |
| 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 spScheduleBrokenPromiseLetters.   |
| Schedule Letter Series Letters   | Creates letter requests for the letters specified in a letter series. Calls stored procedure spScheduleLetterSeriesLetters.  |

| 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 spScheduleNewBusiness.   |
|---------------------------------------|--|
| 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 spScheduleReminderLetters.  |
| 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.  To use this task, click the ellipsis next to the <b>Filename</b> box and click the directory to write the file to.    |
| Task                                  | Description  |
| Set Inactive Closed Credit Cards      | Deactivates PCCs for accounts in 998 or 999 queue level for arrangements that apply to non-linked accounts only. Calls stored procedure <b>spSetInactiveClosedPCC</b> .  |
| Set Inactive Closed Post Dated Checks | Deactivates PDCs for accounts in 998 or 999 queue level for arrangements that apply to non-linked account only. Calls stored procedure spSetInactiveClosedPDC.   |
| Set Inactive Closed Promises          | Deactivates promises for accounts in 998 or 999 queue level for arrangements that apply to non-linked accounts only. Calls stored procedure spSetInactiveClosedPromises.   |
| Update Control File                   | Sets the date in the control file. Calls stored procedure spUpdateControlfileEOD.  |
| Update DOE Document Date Stamps       | Stamps the appropriate field with the date a user sent the requested AWG, loan consolidation, or loan rehabilitation letter. Also stamps the appropriate field with the date a user attached a loan consolidation or rehabilitation document to an account. Calls stored procedure UPDATE_DOE_DocDateStamps. |

# **Task Properties**

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

| Property | Description   |
|----------|---|
|          | 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.  Note: The statements run on the server at one time instead of looped on the client, so write the transactions and other statements accordingly.              |
|          | 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 Append=True. |

| Property    | Description  |
|-------------|--|
| Append      | f 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.  |
| 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                       | True = full debugging text to write to the log.  False = 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. |
| Deleted Records File Format | 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.   |

| Property | Description                         |
|----------|-------------------------------------|
| FileName | Name of the executable file to run. |

| FileName               | Name of the file to create. You can use the following placeholders:<br>\$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 Data  |
| From                   | Email address in the <b>From</b> field.   |
| Instances              | Name of databases to process the task against. For multiple instances, don't separate the database names with a semicolon. * = All instances (as listed in the configuration file). |
| LatApiKey              | API key generated in Latitude. For more information, see "API Key Manager" in the Latitude documentation.   |
| 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.  |

| Property             | Description  |
|----------------------|--|
| 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  |
| SourceFiles          | Name of the files to copy. You can use wildcards. You can separate multiple files be withsemicolons. 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  |
| Successful Exit Code | 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.   |
| То                   | A list of email addresses to receive the email notification, separated by commas or semicolons.  |

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| 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  |
| Url                    | URL of the Latitude instance. Don't end the URL with a forward slash (/).   |
| 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.  |
| Property               | Description   |
| 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.

| lcon | 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.   |

| 13       | SqlCursorTask            | Queries for data, then processes against the data on the server side. Uses separate commands to retrieve and then process the data.   |
|----------|--------------------------|---|
| r.       | Sole Responsibility Task | Retracts active sole responsibility requests that are either pending approval or in an approved state for accounts that no longer have a valid PIF or SIF arrangement.                          |
| Icon     | Task Type                | Description and Usage   |
| 5        | ScriptTask               | Not used.   |
|          |                          | Runs a separate executable file, passes arguments to the file, and determines whether the file executed properly.   |
| ্র       | Method Task              | 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.                      |
|          | ImportTask               | Imports files based on the specified parameters.  |
|          |                          | Creates an email message notification with or without attachments for one or more recipients. You can convert text into HTML using XML/XSLT.  |
| <b>X</b> | Delete Sql Task          | 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. |

|   | SqlTask               | Runs a standard SQL command against the Instances specified.  |
|---|-----------------------|---|
|   | SqlToFileTask         | Queries data and then processes each query result to create one or more files.  |
| 9 | Stored Procedure Task | Runs a stored procedure located in the Latitude database.   |
| 8 |                       | Converts an XML file using an XSL file and saves it to a file for viewing in HTML format.   |
| 3 | TruncateTask          | Removes erroneous data from the tables specified.   |
|   | -                     | 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

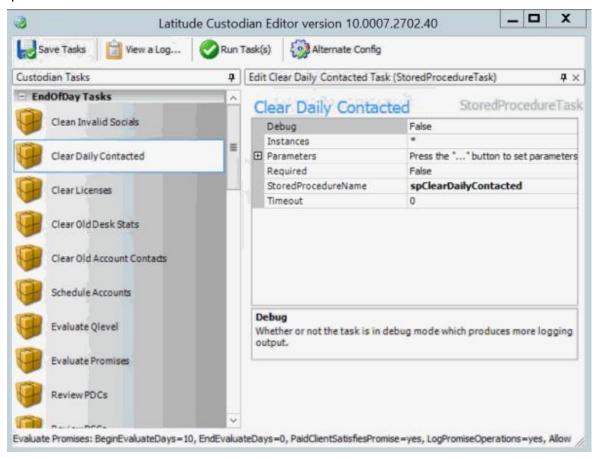
• In the **Custodian Tasks** pane, click a task then drag and drop it in the new location.

# **View Task Properties**

You can view the properties of a task, which show its configuration. For more information about properties, see <u>Task Properties</u>.

# To view task properties

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

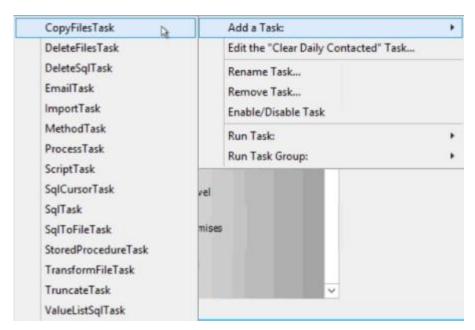


#### Add a Task

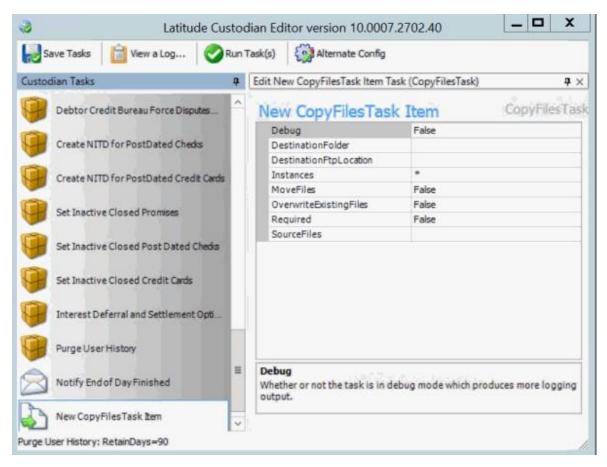
Custodian releases with a set of standard tasks and the ability to create your own tasks. For information about the types of tasks you can add, see <u>Task Types</u>. **To add a task** 

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

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- 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**.



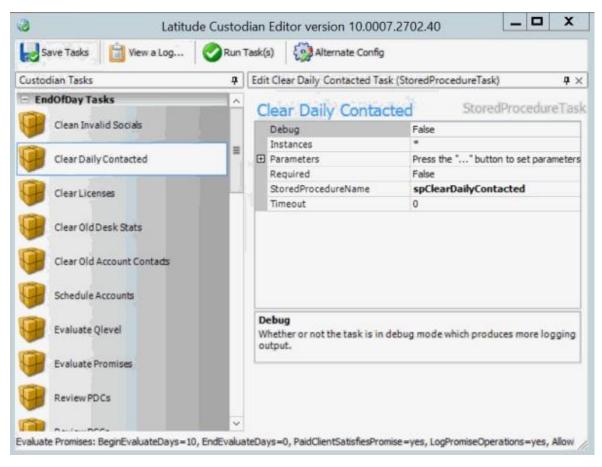
- 4. In the **Custodian Tasks** pane, double-click the new task. The system displays the properties for the task in the **Information** pane.
- 5. Configure the properties and then, in the toolbar, click **Save Tasks**.

# **Modify a Task**

You can modify the configuration for a task. For more information about properties, see <u>Task Properties</u>.

#### 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.



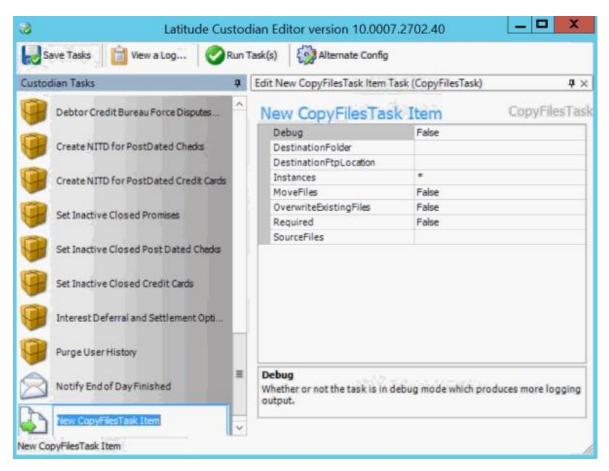
2. Modify the properties and then, in the toolbar, click **Save Tasks**.

#### 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

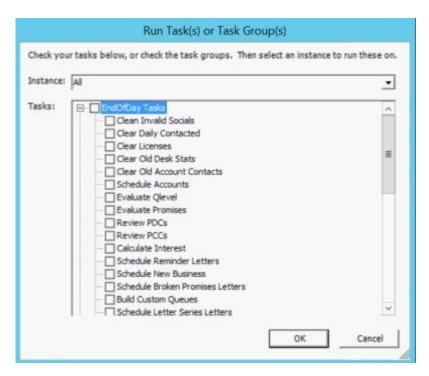
- 1. In the Custodian Tasks pane, right-click a task and then click Run Task. A list of options appears.
- 2. Click the task group to run (for example, **CustomTasks**). A confirmation dialog box appears.
- 3. Click Yes.

# **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.

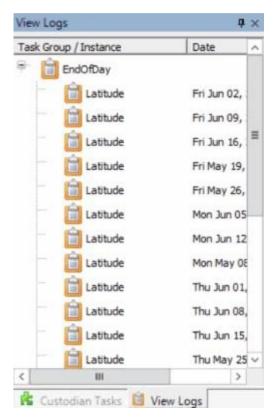
# **View List of Log Files**

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.

# Custodian Printable Help



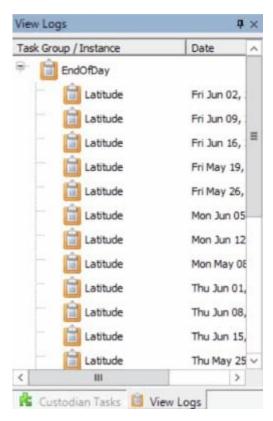
2. To change the sort order, click a column heading.

# **View Log File Detail**

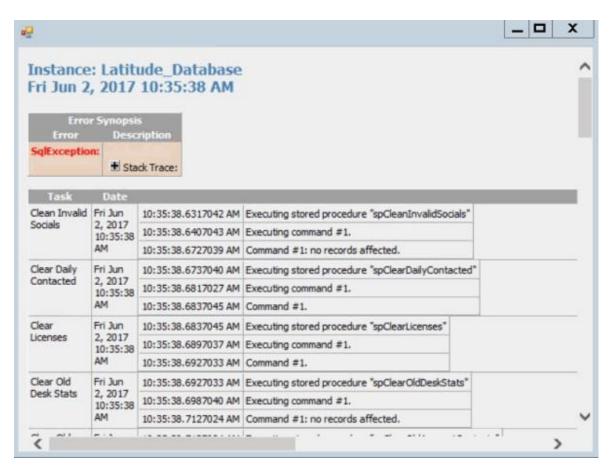
You can view the details of a log file to see which tasks ran, the date and time, and the results.

# To view log file detail

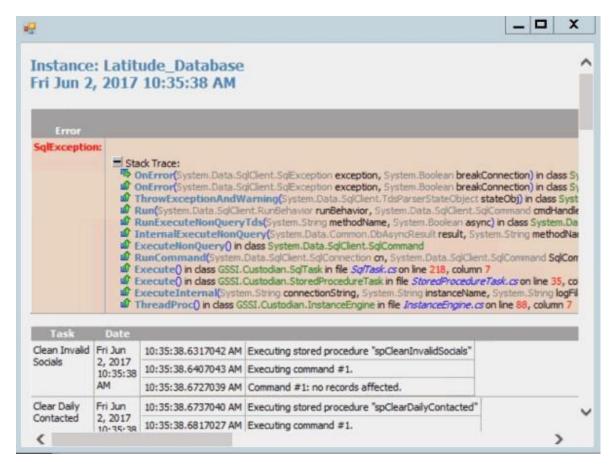
1. In the toolbar, click **View a Log**. The **View Logs** tab appears.



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



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



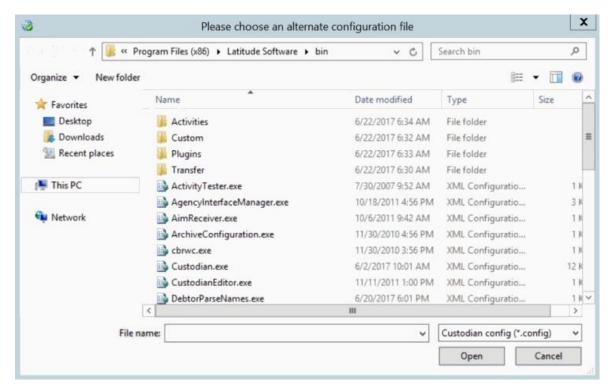
4. When finished viewing the information, click the plus sign (+) in the upper right corner of the window.

# **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** 

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

# Custodian Printable Help



2. Click the configuration file and then click Open.