[°]GENESYS[™]

Document Exporter

Printable Help

Version 12.0

Last updated October 22, 2018

Abstract

This document is a printable version of Document Exporter help.

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Introduction to Document Exporter

Document Exporter allows you to export documents attached to accounts in Latitude. You can export multiple documents for multiple accounts in a single export process. These documents are available in the **Documentation** panel in the **Work Form** in Latitude. For more information about the **Documentation** panel, see "Account Documentation" in the *Latitude* documentation.

Log on to Document Exporter

Use the Latitude Login dialog box to log on to Document Exporter.

To log on to Document Exporter

1. Click Start > All Programs > Interactive Intelligence > Interaction Collector > Latitude Document Exporter. The Latitude Login dialog box appears.

| 将 Latitude Login | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | × |
|--------------------|---|------|
| User Name: | | |
| Password: | | |
| Database: | Default Instance | • |
| 🔲 Log in using Win | dows authentication | |
| ⊆ancel | | Qkay |

- 2. In the **User Name** box, type your Latitude user name.
- 3. 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 Document Exporter window appears.

| 🗽 Latitude Document Exporter | | _ O × |
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Select Accounts

Use the **Select Accounts** tab in the **Latitude Document Exporter** window to select the accounts for which to export documents.

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

1. In the Latitude Document Exporter window, click the Select Accounts tab.

| 🕌 Latitude Document Exporter | | |
|--|---|---|
| File | | |
| Select Accounts Accounts with Document | | |
| Clear Dpen 🛃 Save | E Court | |
| Counts Accounts AlM Champion Challenger Comments Connents Debt Forwarding Obt Forwarding | Exclude Duplicate Records Maximum Records Total Conditions Image: Second Cond Conditions Image: Second Condit | 8 |
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2. To exclude duplicate records from the query results, select **Exclude Duplicate Records**.

3. 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.

- 4. In the **Conditions** pane, do the following as necessary to specify the query conditions:
 - a. Drag and drop one or more conditions into the **Conditions** pane.
 - b. Arrange the order of the conditions.
 - c. Group conditions for evaluation.

5. In the **Order** pane, do the following as necessary to specify the sort order for the data returned in the query results:

- a. Drag and drop one or more data items to use to sort the query results into the **Order** pane.
- b. Arrange the order of the data items.
- c. Click the data item and then click the Ascending or Descending icon.

6. 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**.

7. To save the query, do the following:

In the toolbar, click Save. The Save Query Dialog box appears.

| Save Query Dialog | | |
|--|---------------------------------|------|
| Look In: My Queries | 👻 🛛 👗 Delete 🛛 👶 Export To File | : : |
| Name | Date Created | |
| Accounts is Parent Account Status is Open | 12/14/2012 12/18/2012 | |
| Query Name: | | |
| Cancel | s | iave |

b. 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**.

8. Click **Run**. The query results appear on the **Accounts with Documentation****Export Configuration** tab.

Export Documents

Use the **Accounts with Documentation\Export Configuration** tab in the **Latitude Document Exporter** window to configure the export options and export the documents.

To export documents

1. After running a query, in the Latitude Document Exporter window, click the Accounts with Documentation\Export Configuration tab. The results appear in the data grid.

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| | 1063 | 6011002130041700 | 357 | 2cbReport2013110 | 7.1 5676 | .bxt | sodin | 11/07/2013 | Testi |
| 5 | 1288 | 32656331 | 583 | 2cbReport2013110 | | .bd | gs | 11/07/2013 | Testir |
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Number of Documents Found: Number of documents to export for the selected accounts.

File Name: If selected, saves the documents using their current file name.

Prepend File Number: If selected, saves the documents using their current file name with the Latitude file number included as the prefix.

Prepend Account Number: If selected, saves the documents using their current file name with the customer account number included as the prefix.

Prepend File Number and Account Number: If selected, saves the documents using their current file name with the Latitude file number and customer account number included as the prefix.

Create Folder Using Account Number: If selected, creates a separate folder for each customer account number and saves the documents in their corresponding folder using their current file name.

Create Folder Using File Number: If selected, creates a separate folder for each Latitude file number and saves the documents in their corresponding folder using their current file name.

Establish Naming Convention Using Data Fields: If selected, the system names the files according to the naming convention you specify.

Export Compressed File: If selected, the system compresses the files before exporting them.

Export Decompressed File: If selected, the system doesn't compress the files before exporting them.

Filter: Regular expression to use to limit the documents to export to the ones that match specific file names. You can specify more than one filter.

Save Filters: Saves the filters you specified.

Select the Directory to Move Exported Documents to: Directory to which to move exported documents.

Stop on Error: If selected, the system stops the export process when an error occurs.

- 2. If you selected the Establish Naming Convention Using Data Fields check box, do the following:
 - a. Click the Gear icon next to the check box. The **Select Naming Parameters** dialog box appears.

| Select Naming Parameters | × |
|---|--------------------------------|
| Delimiter | |
| Available Columns | Columns To Be Used in Filename |
| FileNumber Account Debtorid FileName Size FileExtension AttachedBy AttachedDate Category Location UID | |
| ок | Cancel |

- b. Select the columns to use as the file naming convention and then click **OK**.
- 3. Complete the remaining information and then click **Export Documents**. The system exports the documents that match the settings you specified.