



Job Manager

Printable Help

Version 12.0

Last updated October 23, 2018

Abstract

This document is a printable version of Job Manager help.

For copyright and trademark information, see
https://help.genesys.com/latitude/liquid12/desktop/Copyright_and_Trademark_Information.htm.

Table of Contents

Introduction to Job Manager	4
Log on to Job Manager.....	4
Overview of Job Manager Window.....	5
Configure the Navigation Explorer Pane.....	5
Job Service	6
Help Overview.....	7
Search feature.....	8
Search syntax	8
Wildcard expressions	8
Boolean operators	9
Nested expressions	9
Transfer Configuration.....	9
Transfer Configuration.....	9
Create a Transfer Configuration	9
Modify a Transfer Configuration.....	12
Test a Transfer Configuration	15
File Protection Configuration.....	17
File Protection Configuration.....	17
Create a File Protection Configuration	18
Modify a File Protection Configuration.....	19
Test a File Protection Configuration	21
Package Configuration	22
Package Configuration	22
Queries.....	23
Queries.....	23
Query Columns.....	24
Query Conditions	27
Query Order	36
Query Results	38
Create a Vendor Package.....	51

Modify a Vendor Package	53
Schedule Configuration.....	55
Schedule Configuration.....	55
Create a Schedule	56
Modify a Schedule.....	58
Test a Schedule	60
Job Configuration	61
Job Configuration.....	61
Create a Job Configuration	62
Modify a Job Configuration.....	63
Job Categories.....	65
AIM Jobs.....	65
Exchange Jobs	66
Exchange Jobs	66
Create a Process Configuration in Exchange.....	66
Create an Exchange Job	67
Vendor Service Jobs	67
Vendor Service Jobs	67
Create a Vendor Service Job	68
Vendor Service Import Jobs	69
Vendor Service Configuration and Exchange.....	69
Fusion Jobs.....	69
Job Monitoring.....	69
Job Monitoring.....	69
View Job Activity	70
View Scheduled Jobs in Calendar Format.....	71
View a Job Log.....	72
View Files on the Local File Share	72
Use Email to Monitor Activity	73

Introduction to Job Manager

Job Manager allows you to schedule recurring processes for unattended operation. You can define file transfers for vendor services (such as credit reporting), Exchange processes, and AIM imports. You can also define a schedule to export files. Job Manager delivers and retrieves files using FTP, SFTP, FTPS, or file sharing. You can encrypt and decrypt files using Pretty Good Privacy (PGP) encryption. You can also specify email notifications to send to interested parties when file transfers are complete or when errors occur.

Job Manager supports the following components:

- **Job Service:** Windows service that runs on the server to poll one or more databases for jobs to start and run. LATITUDE by Genesys Support installs this service.
- **Exchange:** Application to import and export processes, and modify existing vendor service import mappings.
- **AIM:** Application to set up import and export configurations for outside collections agencies and attorneys.
- **WorkFlow:** Application to set up vendor requests for automatic processing.

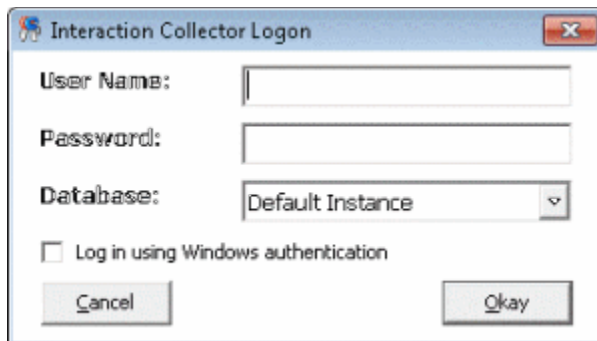
Log on to Job Manager

Use the **Interaction Collector Logon** dialog box to log on to Job Manager. There are no Job Manager permissions in Latitude. Therefore, only provide the Job Manager executable to users trained to use the product.

To log on to Job Manager

1. Do one of the following:
 - On your desktop, click the shortcut to Job Manager.
 - Click **Start > All Programs > Interactive Intelligence > Interaction Collector > Job Manager**

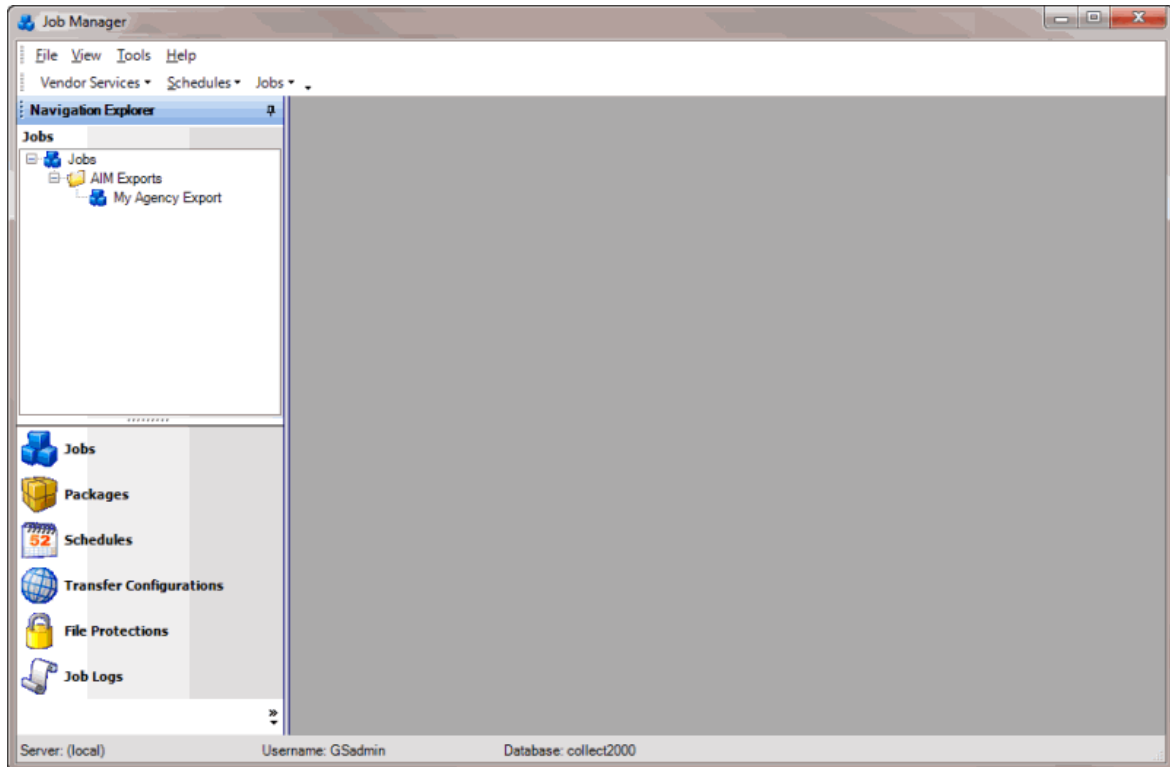
The **Interaction Collector Logon** dialog box appears.



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: Premises-based clients can use Windows authentication to bind Latitude users to their Windows identity to permit logging on to Latitude automatically. Windows authentication is not available for hosted clients. 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 **Job Manager** window appears.



Overview of Job Manager Window

Use the **Job Manager** window to configure jobs, packages, processing schedules, file transfers, and file encryption. You can also use the window to view job logs.

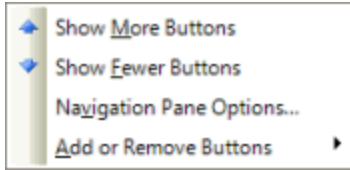
1. **Menu bar:** Displays available menu options and commands for the window.
2. **Navigation Explorer pane:** Displays the navigation for the window. Click a category in the **Navigation Explorer** pane (for example, Jobs, Packages). The options for that category appear. Double-click an item (for example, **New Job**) to display its information in the **Information** pane.
3. **Information pane:** When you click an item in the **Navigation Explorer** pane, the associated information appears in the **Information** pane.

Configure the Navigation Explorer Pane

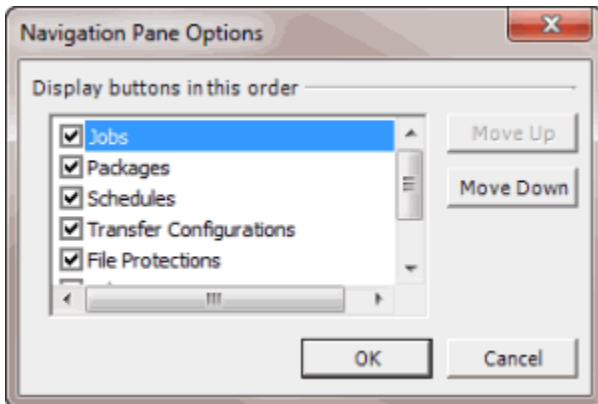
You can configure the **Navigation Explorer** pane to display or hide specific options, and change the order in which the options appear.

To configure the Navigation Explorer pane

1. Near the bottom of the **Navigation Explorer** pane, click the double-arrows. The **Navigation Explorer** pane options appear.



2. To display more options, click **Show More Buttons**. The maximum available options appear.
3. To display fewer options, click **Show Fewer Buttons**. The available options that fit within the pane appear. All other available options appear as icons beneath the list.
4. To specify the order in which the options appear in the pane, do the following:
 - a. Click **Navigation Pane Options...** The **Navigation Pane Options** dialog box appears.



- b. Click an option and then click **Move Up** or **Move Down**.
 - c. When finished arranging the options, click **OK**.
- Note:** You can also select the check boxes for the options to display in the pane, and clear the check boxes for the options to hide in the pane.
5. To add or remove options from the pane, click **Add or Remove Buttons** and then click an option.

Job Service

Job Service is a Microsoft Windows service that runs on the server to poll one or more databases for jobs to start and run. The service runs on workstations to export and import jobs according to their assigned schedules. Latitude by Genesys Support installs this service. Start or stop the service under the direction of Support only.

To start or stop Job Service

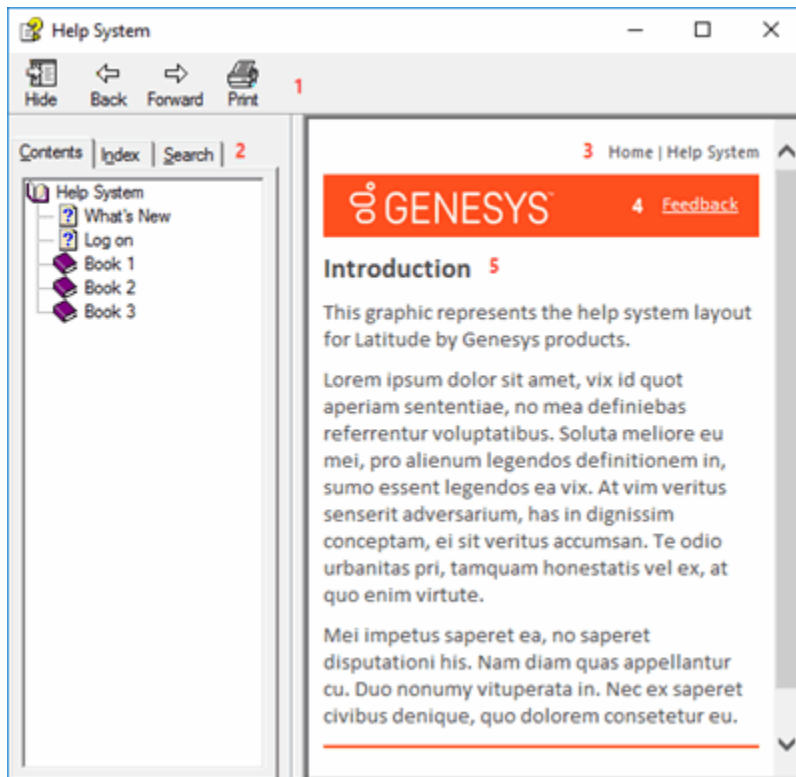
1. Click **Start > Administrative Tools > Services**. The **Services** window appears.
2. Locate Job Service and then do one of the following:
3. To start Job Service, right-click **Job Service** and then click **Start**.
4. To stop Job Service, right-click **Job Service** and then click **Stop**.

Help Overview

Job Manager help provides you with information for using Job Manager. Click the **Help** option in the menu bar to open Job Manager help. Use the table of contents, index, and search features to locate and view a topic.

To open help

In the menu bar, click **Help** and then click **Help on Job Manager**. The **Job Manager 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:** Displays options for the help window.
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: 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 a 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.

Transfer Configuration

Transfer Configuration

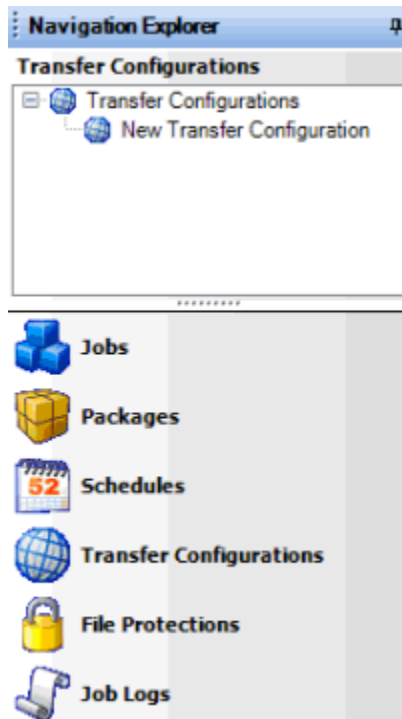
Use the **Transfer Configurations** panel in the **Navigation Explorer** pane to create and maintain folders to organize transfer configurations. From this panel, you can open the **Transfer - [Transfer Configuration Name]** tab in the **Information** pane to add, modify, and test a transfer configuration. All jobs require a transfer configuration to specify how Job Manager sends and receives files. If the transfer configuration settings for a vendor package are the same for import and export jobs, you can set up one transfer configuration and use it for both jobs. If the settings differ, create a separate transfer configuration for each job.

Create a Transfer Configuration

Use the **Transfer - [Transfer Configuration Name]** tab to create a transfer configuration that specifies how to send and retrieves files.

To create a transfer configuration

1. In the **Navigation Explorer** pane, click **Transfer Configurations**. The **Transfer Configurations** panel appears.



2. To create a folder for the new transfer configuration, do the following:
 - a. Right-click **Transfer Configurations**, click **Add**, and then click **Add Folder**.
 - b. Type a name for the folder and then press **Enter**.
3. Right-click the folder where you want to add the transfer configuration, click **Add**, and then click **Add Transfer Configuration**.
4. Type a name for the transfer configuration and then press **Enter**.
5. Do one of the following:
 - Right-click the transfer configuration and then click **Transfer Configuration Properties**.
 - Double-click the transfer configuration.

The **Transfer - [Transfer Configuration Name]** tab appears. Job Manager includes the name of the transfer configuration in the tab name.

Transfer - New Transfer Configuration

Name: New Transfer Configuration

Description: New Transfer Configuration Description

Transfer Type: FTP SFTP FTPS Fileshare

Username: _____

Password: _____

Port: _____ 22

Host Server (URL): _____

Upload File Name Expression: _____

Download File Name Expression (REGEX): _____

Local Directory: _____

Remote Directory: _____

Rename Local File On Download

Renamed Local File Name Expression: _____

Explicit Pickup Mode

Passive Overwrite

Name: Name of the transfer configuration as specified in the **Transfer Configurations** panel. To modify the name, rename it in the **Transfer Configurations** panel.

Description: Description of the transfer configuration.

Transfer Type: Type of file transfer. Valid values are:

FTP: File Transfer Protocol. Job Manager transfers files without encryption.

SFTP: Secure File Transfer Protocol. Job Manager transfer files securely in specially formatted packets using a single connection and an agreed-upon encryption cipher.

FTPS: File Transfer Protocol Secure. Job Manager transfers files securely using SSL encryption.

Fileshare: Job Manager retrieves files from and saves files to a shared drive. If the remote directory is the C: drive, it must be a shared drive.

Username: User name for logging on to the transfer site.

Password: Password for logging on to the transfer site.

Port: FTP port on the recipient's side to store the files that Job Manager sends and retrieves.

Host Server (URL): Address of the host server for the transfer site or file share.

Upload File Name Expression: Naming convention for the file that Job Manager creates and uploads. Include the following expressions as needed (for example, CA_@DateTime(yyMMdss):

@DayCounter(2) - Creates a numeric counter. The (2) variable inserts a number between 0-99, in sequence for each sent file.

@DateTime(yyyyMMddssmm) - Inserts the date and time stamp as part of the file name. Job Manager modifies the (yyyyMMddssmm) variable to use the date stamp differently (for example, MMddss).

Download File Name Expression (REGEX): Syntax used to retrieve the file, with the following recognized regular expressions (for example, ^CA_[0-9][0-9] [0-9][0-9] [0-9][0-9] [0-9][0-9].done):

- ^** - Start at the beginning of the file name
- [0-9]** - Represents any number
- *.*** - Represents any file name, any extension

Local Directory : Location on the local computer or network to store the files. Job Manager retrieves import files from this directory and saves export files to this directory.

Remote Directory : Remote location to store files (for example, the FTP site or file share).

Rename Local File on Download: Not used.

Renamed Local File Name Expression: Not used.

Explicit: If selected, Job Manager uses explicit mode for FTPS providers. For more information, contact your network administrator or outside collection agency or attorney.

Passive : If selected, Job Manager uses passivemode for FTP providers. For more information, contact your network administrator or outside collection agency or attorney.

Pickup Mode : If selected, Job Manager deletes files from the remote site after retrieval. If you don't have the permissions to delete files from the remote site, clear this check box.

Overwrite : If selected, Job Manager overwrites files with the same name on the remote and local sites.

6. Complete the information and then, in the toolbar, click **Save**.

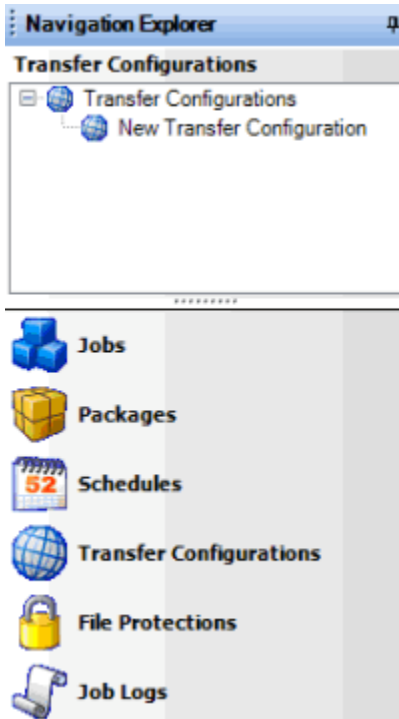
Note: To test the transfer configuration, see [Test a Transfer Configuration](#).

Modify a Transfer Configuration

Use the **Transfer - [Transfer Configuration Name]** tab to modify a transfer configuration that specifies how Job Manager sends and retrieves files.

To modify a transfer configuration

1. In the **Navigation Explorer** pane, click **Transfer Configurations**. The **Transfer Configurations** panel appears.



2. Do one of the following:
 - Right-click the transfer configuration and then click **Transfer Configuration Properties**.
 - Double-click the transfer configuration.

The **Transfer - [Transfer Configuration Name]** tab appears. Job Manager includes the name of the transfer configuration in the tab name.

The screenshot shows a dialog box titled "Transfer - New Transfer Configuration". It contains the following fields and options:

- Name:** New Transfer Configuration
- Description:** New Transfer Configuration Description
- Transfer Type:** FTP (selected), SFTP, FTPS, Fileshare
- Username:** [Empty text box]
- Password:** [Empty text box]
- Port:** 22
- Host Server (URL):** [Empty text box]
- Upload File Name Expression:** [Empty text box]
- Download File Name Expression (REGEX):** [Empty text box]
- Local Directory:** [Empty text box] with a browse button (...)
- Remote Directory:** [Empty text box]
- Rename Local File On Download
- Renamed Local File Name Expression:** [Empty text box]
- Explicit
- Passive
- Pickup Mode
- Overwrite

Name: Name of the transfer configuration as specified in the **Transfer Configurations** panel. To modify the name, rename it in the **Transfer Configurations** panel.

Description: Description of the transfer configuration.

Transfer Type: Type of file transfer. Valid values are:

FTP: File Transfer Protocol. Job Manager transfer files without encryption.

SFTP: Secure File Transfer Protocol. Job Manager transfers files securely in specially formatted packets using a single connection and an agreed-upon encryption cipher.

FTPS: File Transfer Protocol Secure. Job Manager transfers files securely using SSL encryption.

Fileshare: Job Manager retrieves files from and saves files to a shared drive.

Username: User name for logging on to the transfer site.

Password: Password for logging on to the transfer site.

Port: FTP port to store the files that Job Manager sends and retrieves.

Host Server (URL): Address of the host server for the transfer site or file share.

Upload File Name Expression: Naming convention for the file that Job Manager creates and uploads. Include the following expressions as needed (for example, CA_@DateTime(yyMMddss):

@DayCounter(2) - Creates a numeric counter. The (2) variable inserts a number between 0-99, in sequence for each sent file.

@DateTime(yyyyMMddssmm) - Inserts the date and time stamp as part of the file name. Job Manager modifies the (yyyyMMddssmm) variable to use the date stamp differently (for example, MMddss).

Download File Name Expression (REGEX): Syntax used to retrieve the file, with the following recognized regular expressions (for example, ^CA_[0-9][0-9] [0-9][0-9] [0-9][0-9] [0-9][0-9].done):

- ^** - Start at the beginning of the file name
- [0-9]** - Represents any number
- *.*** - Represents any file name, any extension

Local Directory : Location on the local computer or network to store files. Job Manager retrieves import files from this directory and saves export files to this directory.

Remote Directory :Remote location to store files (for example, the FTP site or file share).

Rename Local File on Download: Not used.

Renamed Local File Name Expression: Not used.

Explicit: If selected, Job Manager uses explicit mode for FTPS providers. For more information, contact your network administrator or outside collection agency or attorney.

Passive : If selected, Job Manager uses passivemode for FTP providers. For more information, contact your network administrator or outside collection agency or attorney.

Pickup Mode : If selected, Job Manager deletes files from the remote site after retrieval. If you don't have the permissions to delete files from the remote site, clear this check box.

Overwrite : If selected, Job Manager overwrites files with the same name on the remote or local site.

3. Modify the information as necessary and then, in the toolbar, click **Save**.

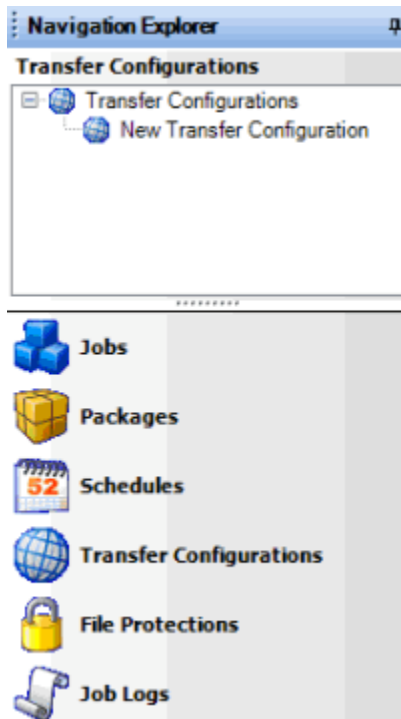
Note: To test the transfer configuration, see [Test a Transfer Configuration](#).

Test a Transfer Configuration

Use the **Transfer - [Transfer Configuration Name]** tab to ensure that your organization configured the settings properly for connecting, uploading, and downloading files.

To test a transfer configuration

1. In the **Navigation Explorer** pane, click **Transfer Configuration**. The **Transfer Configurations** panel appears.



2. Do one of the following:
 - Right-click the transfer configuration and then click **Transfer Configuration Properties**.
 - Double-click the transfer configuration.

The **Transfer - [Transfer Configuration Name]** tab appears. Job Manager includes the name of the transfer configuration in the tab name.

3. Do the following:
 - a. To test the connection settings, in the toolbar, click **Test** and then click **Connect**.
 - b. To test the file upload settings, in the toolbar, click **Test** and then click **Upload**.
 - c. To test the file download settings, in the toolbar, click **Test** and then click **Download**.

If any of the tests fail, Job Manager displays an error message. Click **OK**, modify the settings, and then retest.

File Protection Configuration

File Protection Configuration

Use the **File Protections** panel in the **Navigation Explorer** pane to create and maintain folders to organize file protection configurations. From this panel, you can open the **Protection - [File Protection Name]** tab in the **Information** pane to add, modify, or test a file protection configuration. This tab contains the PGP encryption codes that Job Manager uses to encrypt and decrypt files. You can specify a file protection configuration when defining a vendor package configuration.

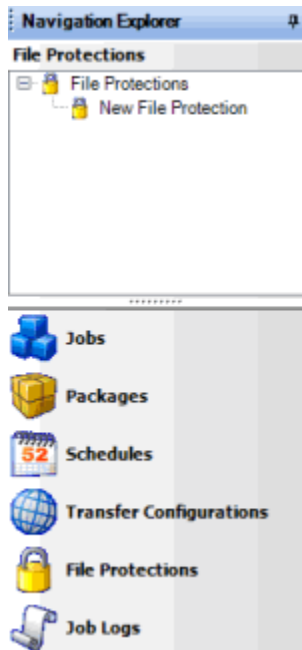
Job Manager encrypts and decrypts files using independent software that creates public and private key files. To allow encryption and decryption, add these files to a file protection configuration. Request a public key from the outside party (for example, collection agency, attorney, or vendor) with whom you are sharing files. Add the public key received into the file protection configuration that Job Manager uses for the outside party's jobs. Add the public and private key that you generate locally. Send your public key to the outside party.

Create a File Protection Configuration

Use the **Protection - [File Protection Name]** tab to create a file protection configuration to use to encrypt and decrypt incoming and outgoing files.

To create a file protection configuration

1. In the **Navigation Explorer** pane, click **File Protections**. The **File Protections** panel appears.



2. To create a folder for the new file protection configuration, do the following:
 - a. Right-click **File Protections**, click **Add**, and then click **Add Folder**.
 - b. Type a name for the folder and then press **Enter**.
3. Right-click the folder where you want to add the file protection, click **Add**, and then click **Add File Protection**.
4. Type a name for the file protection and then press **Enter**.
5. Do one of the following:
 - Right-click the file protection and then click **File Protection Properties**.
 - Double-click the file protection.

The **Protection - [File Protection Name]** tab appears. Job Manager includes the name of the file protection configuration in the tab name.

Name: Name of the file protection configuration as specified in the **File Protections** panel. To modify the name, rename it in the **File Protections** panel.

Description: Description of the file protection configuration.

Local Passphrase: Password to unlock your private key. Job Manager doesn't require you to establish a password.

Load Local Public Key: Key file that your company created. Outside parties use this key to encrypt files they send to your company.

Load Local Private Key: Key file that an outside party created. Job Manager combines this key with the outside party's public key to encrypt files your company sends to the outside party.

Load Third Party Public Key: Key file that an outside party created. Job Manager combines this key with the local private key to encrypt files your company sends to the outside party.

6. Specify the name and description, and optionally, the password to unlock your private key.
7. Do the following as necessary:
 - a. To add the public key, click **Load Local Public Key**. Click the file that contains the public key and then click **Open**.
 - b. To add the private key, click **Load Local Private Key**. Click the file that contains the private key and then click **Open**.
 - c. To add the third-party public key, click **Load Third Party Public Key**. Click the file that contains the third-party public key and then click **Open**.
8. Complete the information and then, in the toolbar, click **Save**.

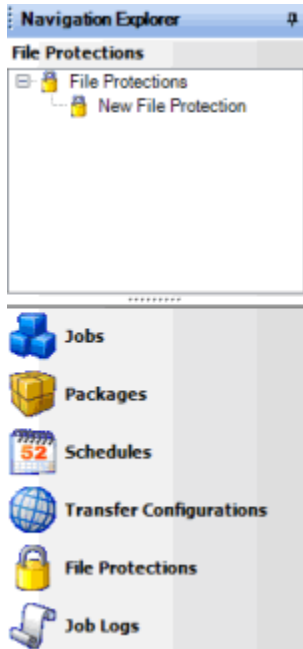
Note: To test the file protection configuration, see [Test a File Protection Configuration](#).

Modify a File Protection Configuration

Use the **Protection - [File Protection Name]** tab to modify a file protection configuration that Job Manager uses to encrypt and decrypt incoming and outgoing files.

To modify a file protection configuration

1. In the **Navigation Explorer** pane, click **File Protections**. The **File Protections** panel appears.



2. Do one of the following:
 - Right-click the file protection and then click **File Protection Properties**.
 - Double-click the file protection.

The **Protection - [File Protection Name]** tab appears. Job Manager includes the name of the file protection configuration in the tab name.



Name: Name of the file protection configuration as specified in the **File Protections** panel. To modify the name, rename it in the **File Protections** panel.

Description: Description of the file protection configuration.

Local Passphrase: Password to unlock your private key. Job Manager doesn't require you to establish a password.

Load Local Public Key: Key file that your company created. Outside parties use this key to encrypt files they send to your company.

Load Local Private Key: Key file that an outside party created. Job Manager combines this key with the outside party's public key to encrypt files your company sends to the outside party.

Load Third Party Public Key: Key file that an outside party created. Job Manager combines this key with the local private key to encrypt files your company sends to the outside party.

3. Modify the information as necessary.
4. To add the public key, click **Load Local Public Key**. Click the file that contains the public key and then click **Open**.
5. To add the private key, click **Load Local Private Key**. Click the file that contains the private key and then click **Open**.
6. To add the third-party public key, click **Load Third Party Public Key**. Click the file that contains the third-party public key and then click **Open**.
7. In the toolbar, click **Save**.

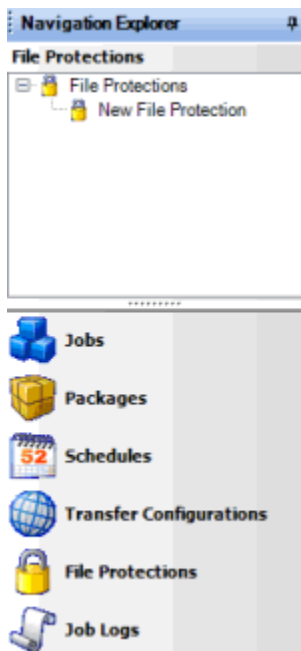
Note: To test the file protection configuration, see [Test a File Protection Configuration](#).

Test a File Protection Configuration

Use the **Protection - [File Protection Name]** tab to ensure that your organization configured the encryption settings properly.

To test a file protection configuration

1. In the **Navigation Explorer** pane, click **File Protections**. The **File Protections** panel appears.



2. Do one of the following:
 - Right-click the file protection configuration and then click **File Protection Properties**.
 - Double-click the file protection configuration.

The **Protection - [File Protection Name]** tab appears. Job Manager includes the name of the file protection configuration in the tab name.



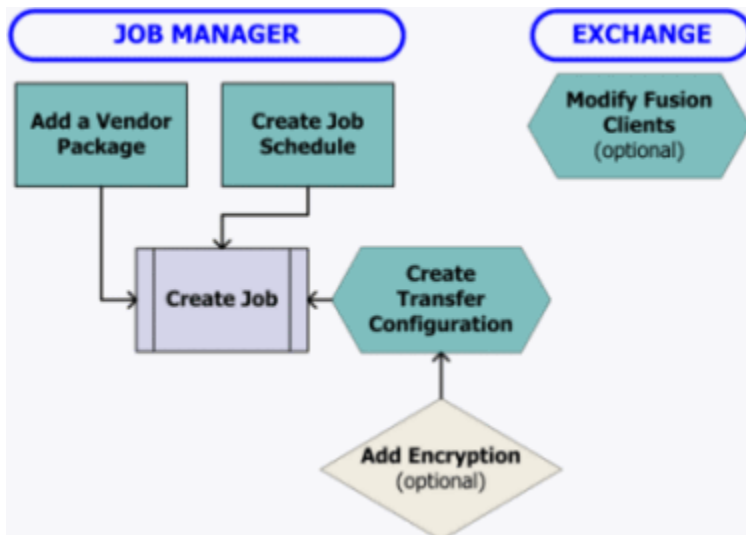
3. Do the following:
 - a. To test the protected file settings, in the toolbar, click **Test** and then click **Protect File**. Select the file to test and then click **Open**.
 - b. To test the unprotected file settings, in the toolbar, click **Test** and then click **Unprotect File**. Select the file to test and then click **Open**.

If any of the tests fail, Job Manager displays an error message. Click **OK**, modify the settings, and then retest.

Package Configuration

Package Configuration

Use the **Packages** panel in the **Navigation Explorer** pane to view the folders and subfolders for the vendor service packages that Job Manager supports. From this panel, you can open the **Package - [Package Configuration Name]** tab in the **Information** pane to add or modify a vendor package configuration. Job Manager uses vendor packages to import and export files for outside vendors, such as credit bureaus. The following graphic provides an overview.



Queries

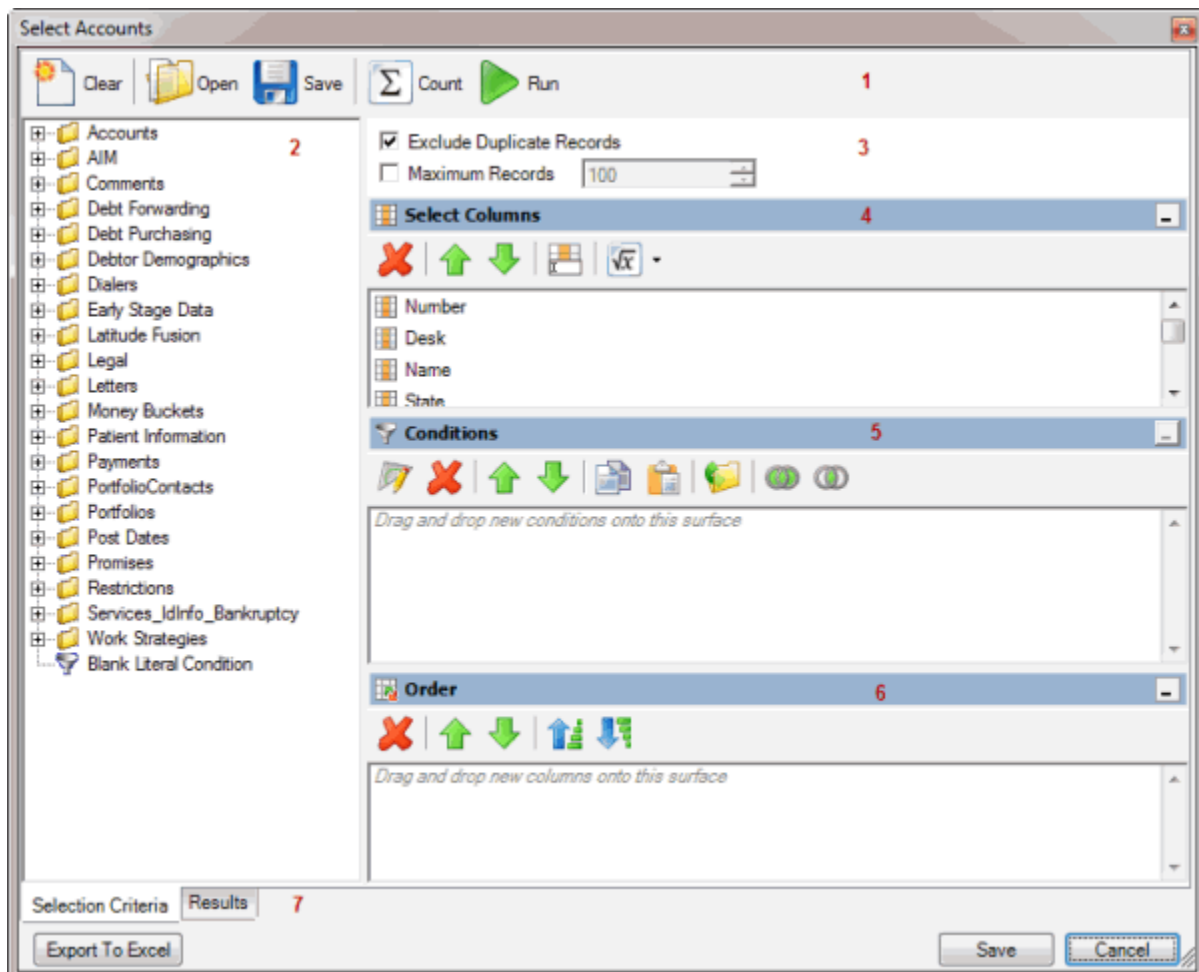
Queries

Use the **Select Accounts** window to create a query to retrieve accounts that meet specific criteria. You can run a query to view, sort, group, and summarize the query results before implementing the query. Once you create a query, you associate it to a vendor package. For more information, see [Package Configuration](#).

Note: You can open a query that a user created using the **Account Analysis** tool in Latitude and use it in Job Manager.

To open the Select Accounts window

In the **Job Manager** window, in the menu bar, click **Tools** and then click **Query Designer**. The **Select Accounts** window appears.



1. **Top Toolbar:** Displays the functions that are available for the query. Use the **Save** option in the toolbar to save the query so you can associate it to a package.
2. **Data Selection pane:** Displays the data available to include in the query.
3. **Options:** Displays options to apply to the query.

4. **Select Columns pane:** Allows you to specify the data columns to include in the query results.
5. **Conditions pane:** Allows you to specify the conditions for retrieving accounts.
6. **Order pane:** Allows you to specify the sort order for the query results.
7. **Bottom Toolbar and Tabs:** Allows you to export the query results, save the query, or close the window without saving the query.

Query Columns

Query Columns

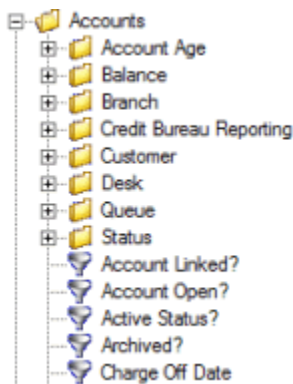
Use the **Select Columns** pane in the **Select Accounts** window to specify the data columns to include in the query results. A default set of columns appears in the **Select Columns** pane.

Add a Query Column

Use the **Select Columns** pane in the **Select Accounts** window to add a column to display in the query results.

To add a query column

1. With the **Select Accounts** window open, in the **Data Selection** pane, click the plus sign (+) next to a folder to expand it.



2. Click the data item to display in a column in the query results and drag and drop it in the **Select Columns** pane.



3. Drag and drop more data items as necessary.

Modify the Query Column Order

Use the **Select Columns** pane in the **Select Accounts** window to change the order in which columns of data appear in the query results.

To modify the query column order

1. With the **Select Accounts** window open, go to the **Select Columns** pane.



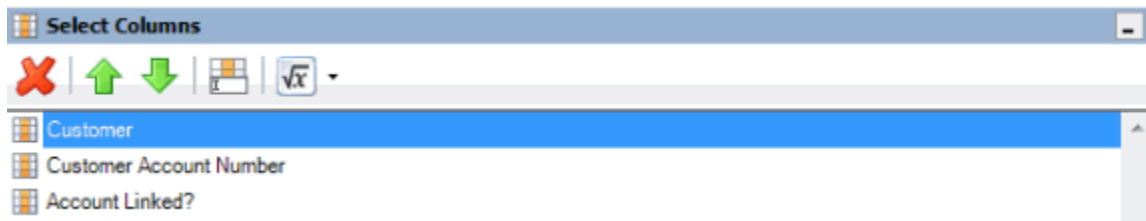
2. To move up a column in the list, click the column and then, in the toolbar, click the up arrow.
3. To move down a column in the list, click the column and then, in the toolbar, click the down arrow.

Modify a Query Column Name

Use the **Select Columns** pane in the **Select Accounts** window to modify the name of a column in the query results.

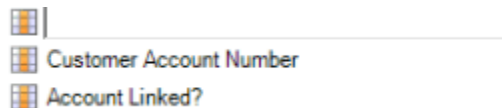
To modify a query column name

1. With the **Select Accounts** window open, go to the **Select Columns** pane.



2. Do one of the following:
 - Click the column and then, in the toolbar, click the Rename icon.
 - Right-click the column and then click **Rename**.

The query designer clears the column name and displays a box to allow you to modify the column name.



3. In the box, type the new name for the column and then press **Enter**. The original column name appears with the new name appended. For example, if you change the **Customer** column to **Client**, the column name changes to **Customer as Client**.

Delete a Query Column

Use the **Select Columns** pane in the **Select Accounts** window to delete a column from the query so that the query designer doesn't include it in the query results.

To delete a query column

1. With the **Select Accounts** window open, go to the **Select Columns** pane.



2. Do one of the following:
 - Click the column and then, in the toolbar, click the Delete icon.
 - Click the column and then press the **Delete** key.
 - Right-click the column and then click **Delete**.

A confirmation dialog box appears.

3. Click **Yes**.

Assign an Aggregate Function to a Query Column

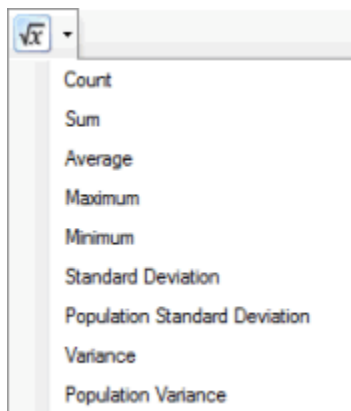
Use the **Select Columns** pane in the **Select Accounts** window to assign an aggregate function to a column. When you run the query, the query results show the aggregated values in the column instead of the actual value. Non-aggregated columns create the groups represented by the aggregated data. For more information about aggregate functions, see [Aggregate Functions](#).

To assign an aggregate function to a query column

1. With the **Select Accounts** window open, go to the **Select Columns** pane.



2. Click the column and then, in the toolbar, click the arrow next to the Aggregate icon. A list of functions appears.



3. Click a function. The original column name appears with the aggregate function name appended. For example, if you selected the "average" function for the **Linked Current Balance** column, the **Linked Current Balance** column name changes to **Average of Linked Current Balance**. In the query results, the average account balance for all the linked accounts appears.
4. To delete an aggregated function, click the column name and then click the Aggregate icon.

Aggregate Functions

The following table describes the functions that are available when aggregating data. The functions available for an item are based on the item's data type.

Function	Description
Count	Counts the number of records for the grouping.
Sum	Totals the values within the grouping.
Average	Averages the values within the grouping.
Maximum	Calculates the highest value within the grouping.
Minimum	Calculates the lowest value within the grouping.
Standard Deviation	Averages the difference from the mean value of the entire set of accounts included.
Population Standard Deviation	Averages the difference from the mean value within the grouping.
Variance	Squares the standard deviation.
Population Variance	Squares the standard deviation within the grouping.
Eliminate Duplicates	Changes the equation to add the "distinct" clause. You can use this function with any aggregate after the initial selection.
Remove Aggregate	Deletes the aggregate function and returns the column to its literal value.

Query Conditions

Query Conditions

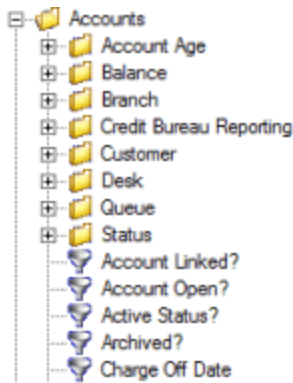
Use the **Conditions** pane in the **Select Accounts** window to specify the criteria for data to include in the query results.

Create a Query Condition

Use the **Conditions** pane in the **Select Accounts** window to specify the criteria for which data to include in the query results. Queries contain a default condition to include only the accounts that an agency or attorney doesn't hold currently. You cannot delete this condition.

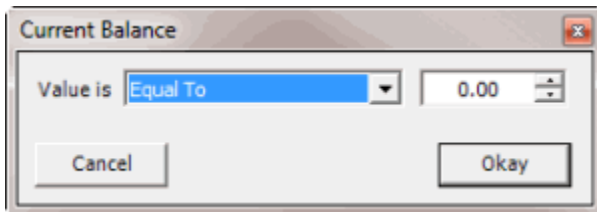
To create a query condition

1. With the **Select Accounts** window open, in the **Data Selection** pane, click the plus sign (+) next to a folder to expand it.

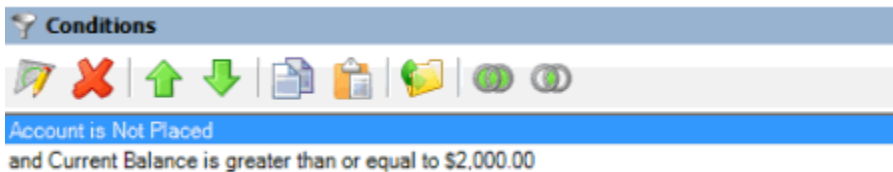


2. Click the data item for which to set a condition and drag and drop it in the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected.

The following example shows the **Current Balance** dialog box that appears when you drag and drop the **Current Balance** data item into the **Conditions** pane.



3. In the dialog box, specify the criteria and then click **Okay**. The condition appears in the **Conditions** pane. In the following example, the condition indicates you want to include in the query results accounts with a current balance that is greater than or equal to "\$2,000."



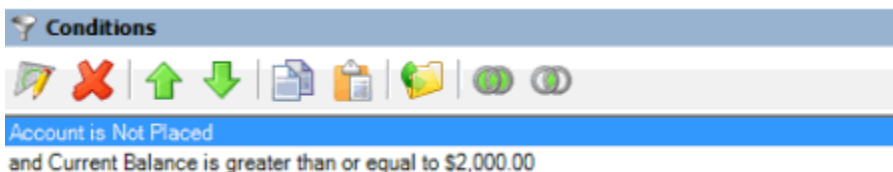
4. Drag and drop more data items as necessary.

Modify a Query Condition

Use the **Conditions** pane in the **Select Accounts** window to modify a query condition.

To modify a query condition

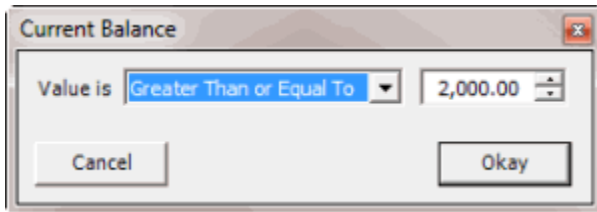
1. With the **Select Accounts** window open, go to the **Conditions** pane.



2. Do one of the following:

- Click a condition and then, in the toolbar, click the Edit icon.
- Double-click a condition.
- Right-click a condition and then click **Edit**.

A dialog box appears, which allows you to modify the criteria. The title of the dialog box and the information displayed depends on the condition selected.



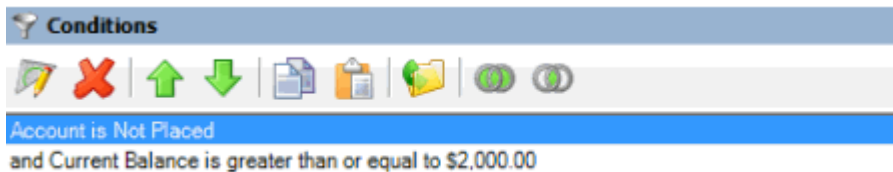
3. In the dialog box, modify the criteria and then click **Okay**. The query designer updates the condition in the **Conditions** pane.

Copy a Query Condition

Use the **Conditions** pane in the **Select Accounts** window to copy a query condition.

To copy a query condition

1. With the **Select Accounts** window open, go to the **Conditions** pane.



2. Do one of the following:
 - Click the condition and then, in the toolbar, click the Copy icon.
 - Right-click the condition and then click **Copy**.

The query designer copies the condition to the Clipboard.

3. Do one of the following:
 - Click where you want to copy the condition and then, in the toolbar, click the Paste icon.
 - Right-click where you want to copy the condition and then click **Paste**.

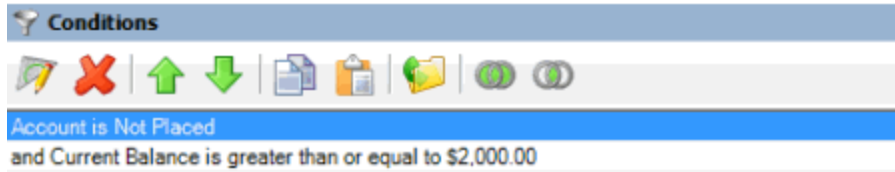
The query designer pastes the condition in the specified location.

Group Query Conditions

Use the **Conditions** pane in the **Select Accounts** window to separate conditions into groups when you require complex data mining.

To group query conditions

1. With the **Select Accounts** window open, go to the **Conditions** pane.



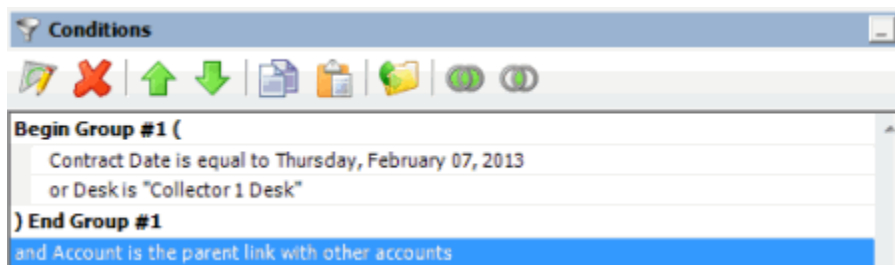
2. Click the conditions to group.

Tip: To select multiple sequential conditions, press and hold the **Shift** key and click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the **Ctrl** key and click each individual condition. To select all conditions, right-click and then click **Select All**.

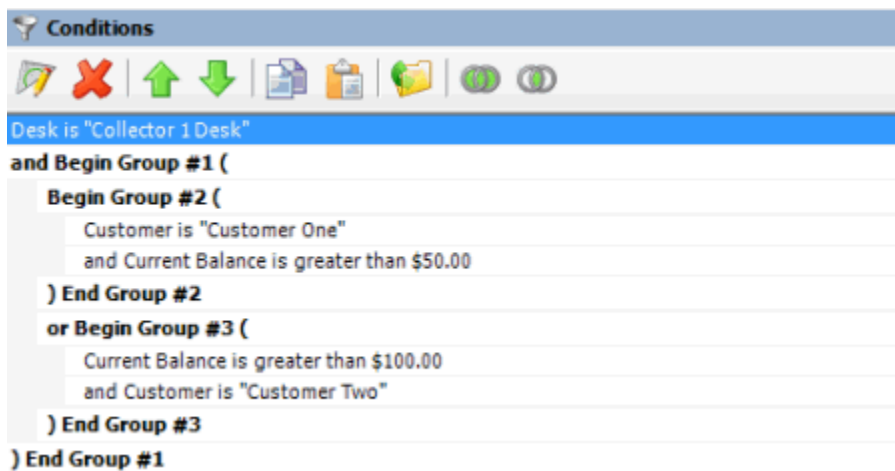
3. Do one of the following:

- In the toolbar, click the Group icon.
- Right-click the selected conditions and then click **Group**.

The query designer groups the selected conditions and identifies the beginning and ending of the group.



4. Continue grouping conditions as necessary. The following example shows a complex grouping of conditions.

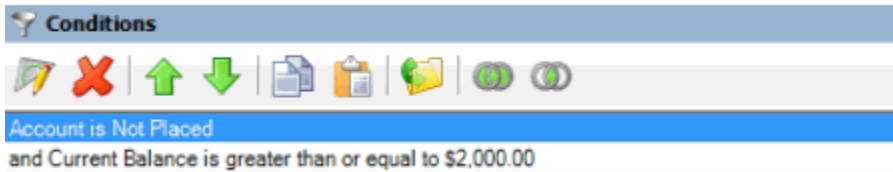


Modify the Query Condition Order

Use the **Conditions** pane in the **Select Accounts** window to modify the order in which to evaluate conditions.

To modify the query condition order

1. With the **Select Accounts** window open, go to the **conditions** pane.



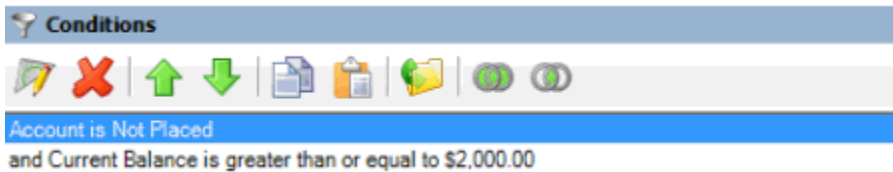
2. To move up a condition in the list, click the condition and then, in the toolbar, click the up arrow.
3. To move down a condition in the list, click the condition and then, in the toolbar, click the down arrow.

Set a Query Condition to Optional or Required

Use the **Conditions** pane in the **Select Accounts** window to set a query condition to optional or required using Boolean operators (OR, AND). The query designer sets conditions to "required" by default. If a query has a single condition, the query requires that condition and you cannot set it to optional. If a query has more than one condition, you can set each condition that follows the first condition in the list to required or optional. For more information about Boolean operators, see [Boolean Operators](#).

To set a query condition to optional or required

1. With the **Select Accounts** window open, go to the **Conditions** pane.



2. To change the query so that only one condition has to be true for an account to appear in the query results, do one of the following:
 - Click the second condition and then, in the toolbar, click the OR icon.
 - Right-click the second condition and then click **Set Condition Optional**.

The condition changes from "and" to "or."
3. To change the query to require both conditions for an account to appear in the query results, do one of the following:
 - Click the second condition and then, in the toolbar, click the AND icon.
 - Right-click the second condition and then click **Set Condition Required**.

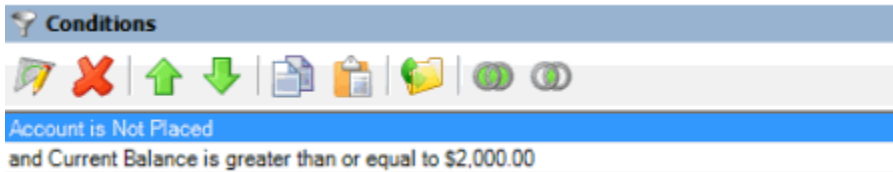
The condition changes from "or" to "and."

Delete a Query Condition

Use the **Conditions** pane in the **Select Accounts** window to delete a condition from a query.

To delete a query condition

1. With the **Select Accounts** window open, go to the **Conditions** pane.



2. Do one of the following:
 - Click the condition and then, in the toolbar, click the Delete icon.
 - Click the condition and then press the **Delete** key.
 - Right-click the condition and then click **Delete**.

A confirmation dialog box appears.

3. Click **Yes**.

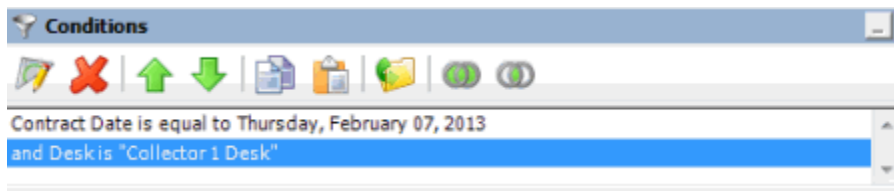
Boolean Operators

Boolean operators allow you to set a query condition to optional or required.

AND condition

The AND condition sets a condition to required.

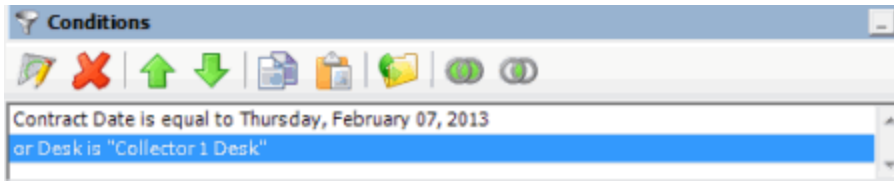
In the following example, both conditions must be true for an account to appear in the query results. So, if an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the query results don't include the account. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the query results don't include the account.



OR condition

The OR condition sets a condition to optional.

In the following example, if an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the query results include the account. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is not "February 7, 2013" or the Desk is not "Collect 1 Desk," the query results don't include the account.



Query Condition Types

You use query conditions when creating and running queries. For each condition you select for your query, you specify the criteria to use to evaluate accounts. The criteria available is based on the condition type.

Each condition is one of the following types:

- [Dates](#)
- [Single option](#)
- [Multiple option](#)

Dates

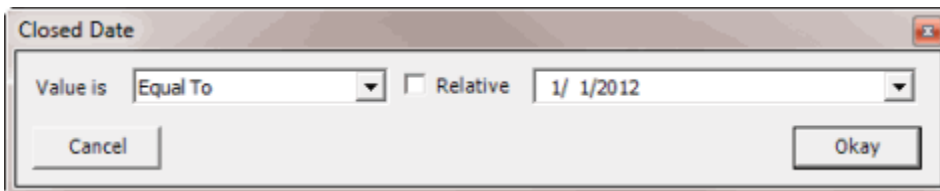
Date conditions allow you to query accounts based on a [specific date](#), [date range](#), [any date or blank date](#), or [relative date](#). When you select a date condition, a dialog box displays to allow you to specify the date criteria. The criteria available depends on the value you select in the **Value is** list box, and whether you select the **Relative** check box.

Specific date

Use one of the following comparisons to evaluate accounts based on a specific date:

Value is	Description
Equal To	Retrieves accounts where the date matches a specific date.
Not Equal To	Retrieves accounts where the date does not match a specific date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after a specific date.
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before a specific date.
Later Than	Retrieves accounts where the date comes after a specific date.
Earlier Than	Retrieves accounts where the date comes before a specific date.

In the following example, the system retrieves accounts where the **Closed Date** is 01/01/2012.

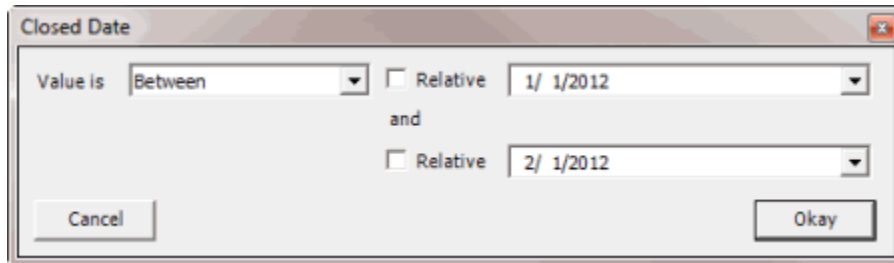


Date range

Use one of the following comparisons to evaluate accounts based on a date range:

Value is	Description
Between	Retrieves accounts where the date falls between two specific dates.
Not Between	Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates.

In the following example, the system retrieves accounts where the **Closed Date** falls on or between 01/01/2012 and 02/01/2012.

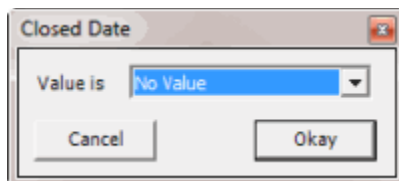


Any date or blank date

Use one of the following comparisons to evaluate accounts based on whether a date is blank or contains any value:

Value is	Description
No Value	Retrieves accounts where the date is blank.
Any Value	Retrieves accounts where the date is any date or blank.

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).



Relative date

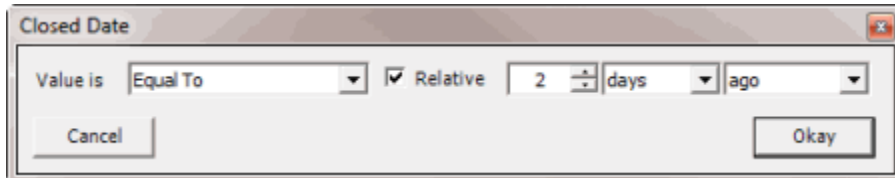
Use the relative date option to evaluate accounts based on the relation of a date to the current date. You specify a comparison and the criteria to use to calculate the relative date. The criteria are the number of days, months or years from the current date, and whether to add or subtract that number from the current date.

Use one of the following comparisons to evaluate accounts based on the calculated relative date:

Value is	Description
Equal To	Retrieves accounts where the date matches the relative date.
Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.

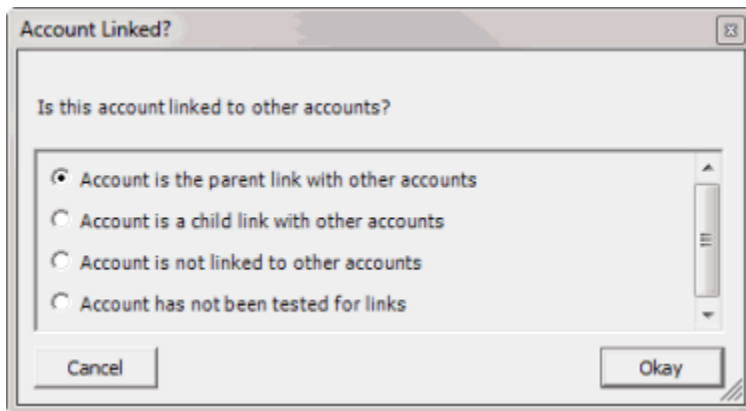
Value is	Description
Earlier Than or Equal To	Retrieves accounts where the date matches or comes before the relative date.
Later Than	Retrieves accounts where the date comes after the relative date.
Earlier Than	Retrieves accounts where the date comes before the relative date.

In the following example, the system retrieves accounts where the **Closed Date** is two days before the current date.



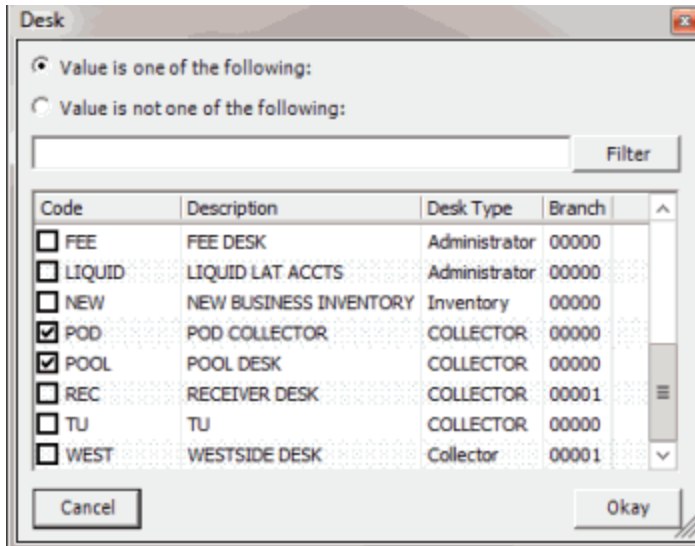
Single option

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are the parent link to other accounts.



Multiple option

Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. In the following example, the system retrieves accounts assigned to the POD desk and accounts assigned to the POOL desk.



Query Order

Query Order

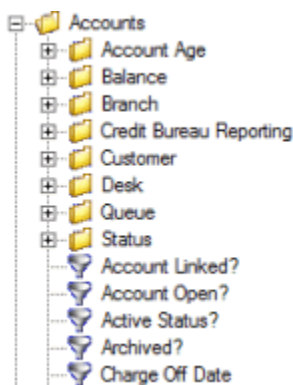
Use the **Order** pane in the **Select Accounts** window to specify the sort order for the data returned in the query results. For example, if the **Order** pane includes desk and customer, the system sorts the query results first by desk and then by customer within the desk.

Specify the Query Sort Order

Use the **Order** pane in the **Select Accounts** window to specify the sort order for the query results.

To specify the query sort order

1. With the **Select Accounts** window open, in the **Data Selection** pane, click the plus sign (+) next to a folder to expand it.



2. Click the data item to use to sort the query results and drag and drop it into the **Order** pane.



Note: If the query window has a **Select Columns** pane, you can sort by aggregate data. Drag the aggregated column from the **Select Columns** pane and drop it into the **Order** pane. For more information about aggregating data, see [Assign an Aggregate Function to a Query Column](#).

3. Drag and drop more data items as necessary.

Modify the Sort Order

Use the **Order** pane in the **Select Accounts** window to modify the sort order for the query results.

To modify the sort order

1. With the **Select Accounts** window open, go to the **Order** pane.



2. To move up a data item in the list, click the data item and then, in the toolbar, click the up arrow.
3. To move down a data item in the list, click the data item and then, in the toolbar, click the down arrow.

Set the Sort Order to Ascending

Use the **Order** pane in the **Select Accounts** window to set the sort order for a data item to ascending order.

To set the sort order to ascending

1. With the **Select Accounts** window open, go to the **Order** pane.



2. Do one of the following:
 - Click the data item and then, in the toolbar, click the Ascending icon.
 - Right-click the data item and then click **Set Ascending Order**.

Set the Sort Order to Descending

Use the **Order** pane in the **Select Accounts** window to set the sort order for a data item to descending order.

To set the sort order to descending

1. With the **Select Accounts** window open, go to the **Order** pane.



2. Do one of the following:
 - Click the data item and then, in the toolbar, click the Descending icon.
 - Right-click the data item and then click **Set Descending Order**.

Delete a Data Item From the Sort

Use the **Order** pane in the **Select Accounts** window to delete a data item from the query results sort order

To delete a data item from the sort

1. With the **Select Accounts** window open, go to the **Order** pane.



2. Do one of the following:
 - Click the data item and then, in the toolbar, click the Delete icon.
 - Click the data item and then press the **Delete** key.
 - Right-click the data item and then click **Delete**.

A confirmation dialog box appears.

3. Click **Yes**.

Query Results

Query Results

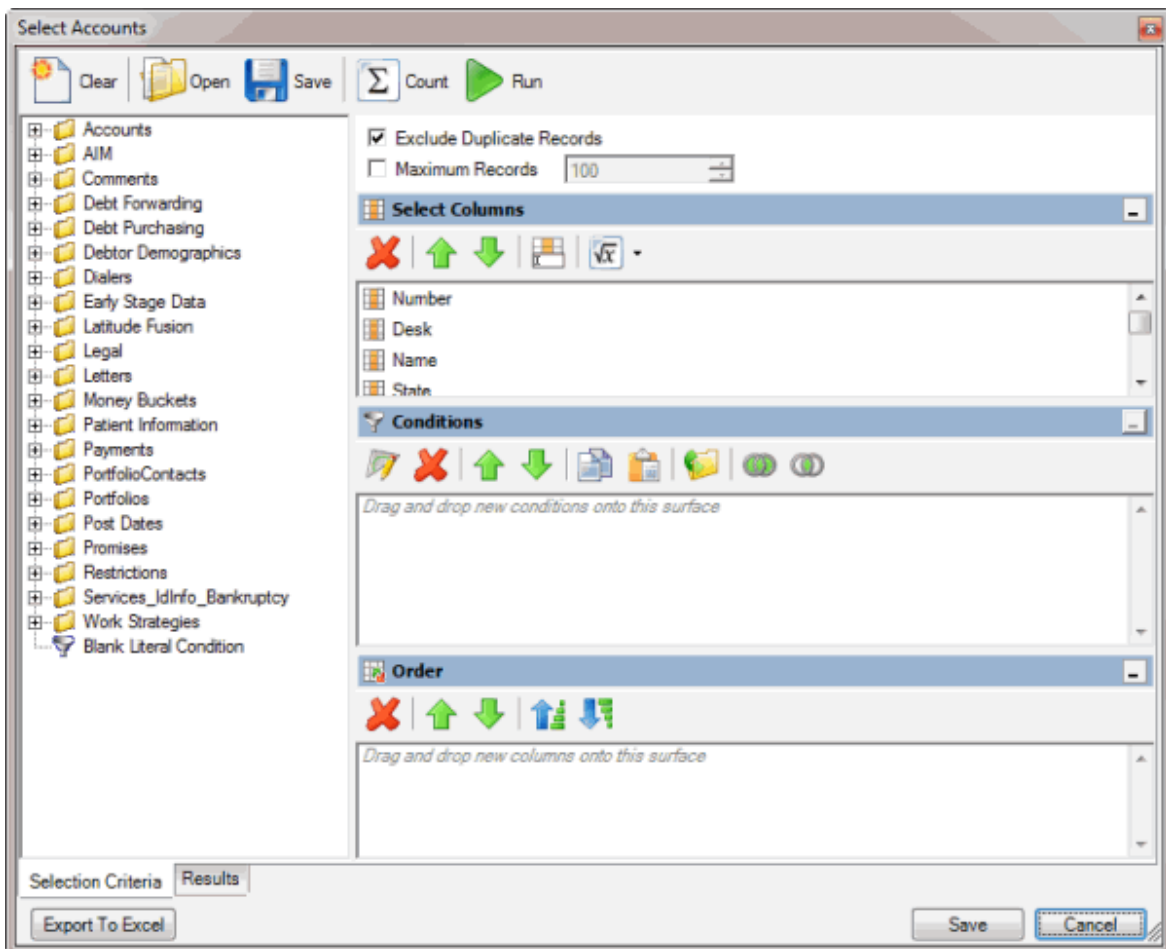
Use the **Results** tab in the **Select Accounts** window to view the results of a query, and change the view.

Run a Query

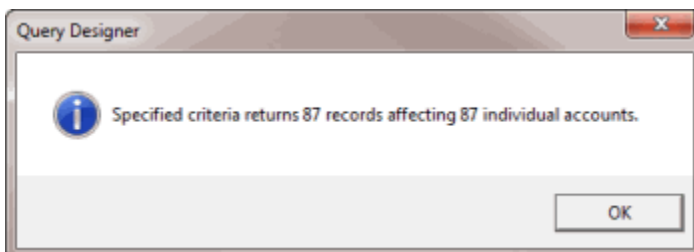
Use the **Results** tab in the **Select Accounts** window to view the results of a query.

To run a query

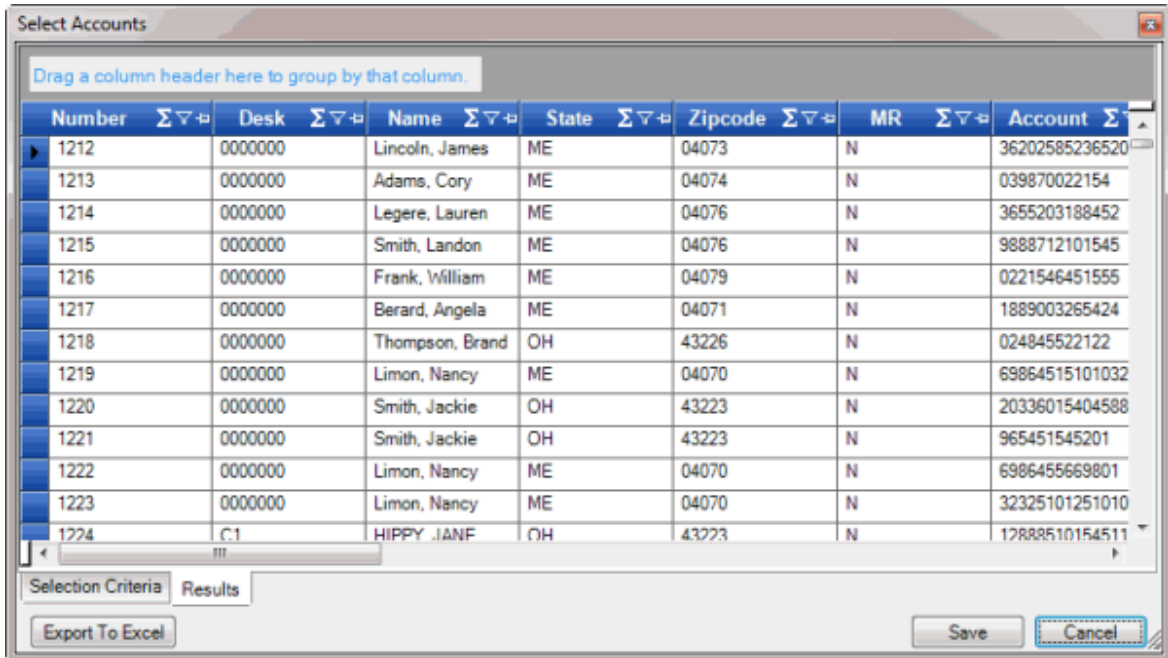
1. Ensure that a query is open in the **Select Accounts** window.



2. To count the number of records that match the criteria, do the following:
 - a. In the toolbar, click **Count**. The **Query Designer** dialog box appears.



- b. Click **OK**.
3. To view the query results, in the toolbar, click **Run**. The query results appear on the **Results** tab.

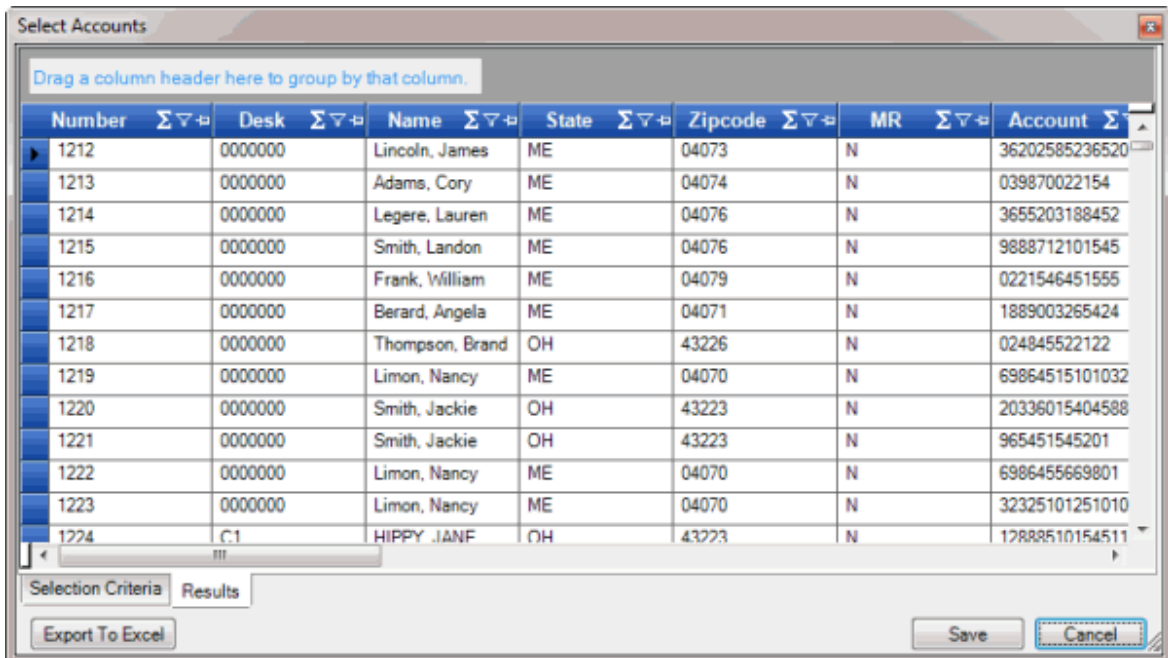


Arrange Column Headings

Use the **Results** tab in the **Select Accounts** window to change the order in which columns appear in the query results.

To arrange column headings

1. With the **Select Accounts** window open, in the toolbar, click **Run**. The results appear on the **Results** tab.



2. Click a column heading and drag it to the new location.

- When two red arrows appear in the location where you want to place the column, release your mouse button.

Drag a column header here to group by that column.

Number	Desk	Number	State
1000	0000000	KILE, RICHARD	PA
1003	0000000	SEVERINO, EVA	PA
1004	0000000	ZELLERS Jr, LES	
1005	0000000	WIESEN, ROY	PA

Pin a Query Results Column

Use the **Results** tab in the **Select Accounts** window to pin a column in the query results so that it remains stationary when you scroll horizontally.

To pin a query results column

- With the **Select Accounts** window open, in the toolbar, click **Run**. The results appear on the **Results** tab.

Drag a column header here to group by that column.

Number	Desk	Name	State	Zipcode	MR	Account
1212	0000000	Lincoln, James	ME	04073	N	36202585236520
1213	0000000	Adams, Cory	ME	04074	N	039870022154
1214	0000000	Legere, Lauren	ME	04076	N	3655203188452
1215	0000000	Smith, Landon	ME	04076	N	9888712101545
1216	0000000	Frank, William	ME	04079	N	0221546451555
1217	0000000	Berard, Angela	ME	04071	N	1889003265424
1218	0000000	Thompson, Brand	OH	43226	N	024845522122
1219	0000000	Limon, Nancy	ME	04070	N	69864515101032
1220	0000000	Smith, Jackie	OH	43223	N	20336015404588
1221	0000000	Smith, Jackie	OH	43223	N	965451545201
1222	0000000	Limon, Nancy	ME	04070	N	6986455669801
1223	0000000	Limon, Nancy	ME	04070	N	32325101251010
1224	C1	HIPPY, JANF	OH	43223	N	12888510154511

Selection Criteria Results

Export To Excel Save Cancel

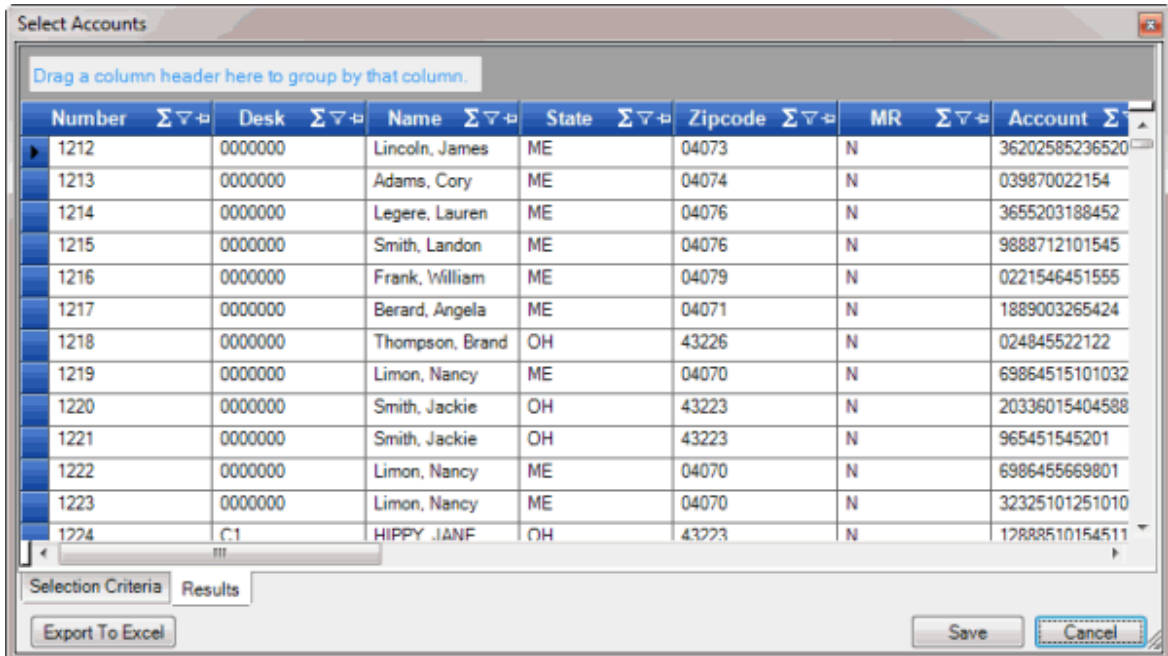
- In the column heading, click the Pushpin icon. The pushpin points down to indicate that the column is pinned.
- Scroll horizontally in either direction and the pinned column remains stationary.

Sort Query Results

Use the **Results** tab in the **Select Accounts** window to sort the query results.

To sort query results

1. With the **Select Accounts** window open, in the toolbar, click **Run**. The results appear on the **Results** tab.



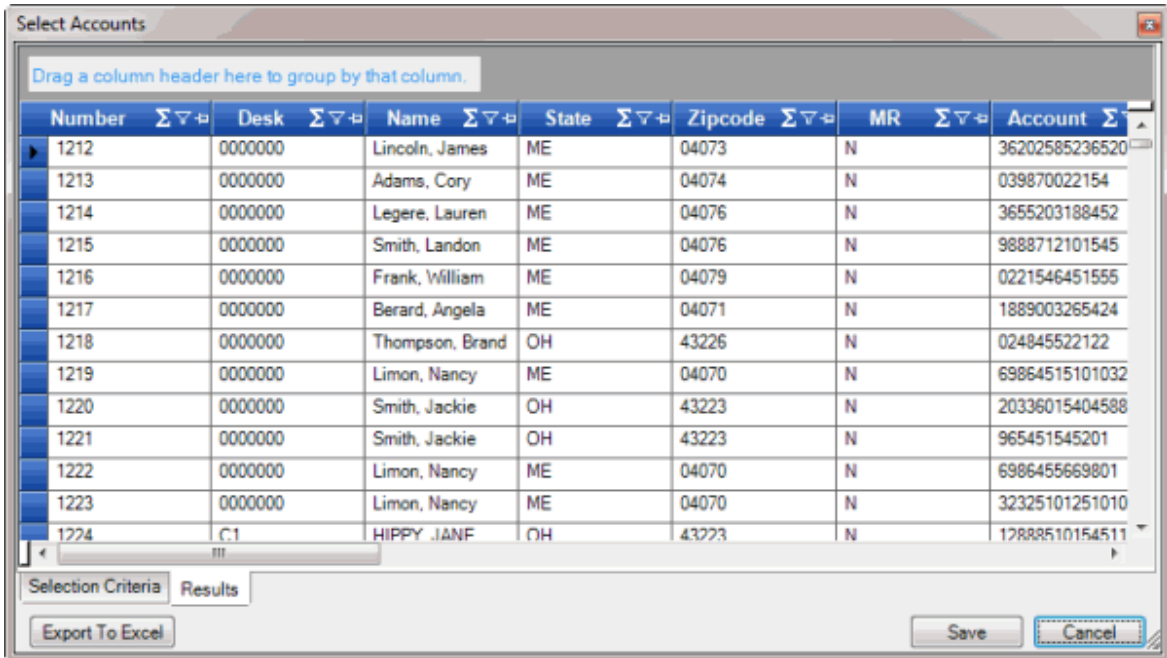
2. Click a column heading. An arrow that points upward appears next to the column heading to indicate that the system sorted the column in ascending order.
3. To sort the column in descending order, click the column heading again. The arrow points downward to indicate that the system sorted the column in descending order.

Group Accounts

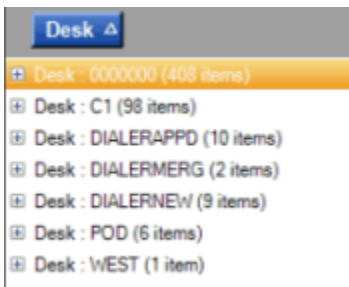
Use the **Results** tab in the **Select Accounts** window to group accounts in the query results.

To group accounts

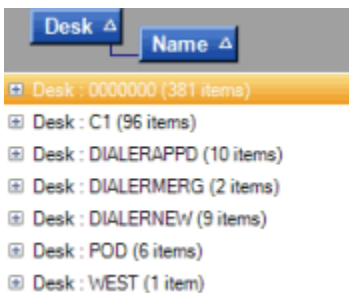
1. With the **Select Accounts** window open, in the toolbar, click **Run**. The results appear on the **Results** tab.



2. Click a column heading, drag it into the space above the column headings, and drop it. The system groups the accounts on the specified column. The following example shows accounts grouped by customer.



3. To view the accounts in a group, click the plus sign (+) next to the group to expand it.
4. To add a group within a group, do the following:
 - a. Click the plus sign (+) next to the group to expand it.
 - b. Click a column heading, drag it into the space above the column headings, and drop it.



5. Click the plus sign (+) next to the group to expand it.



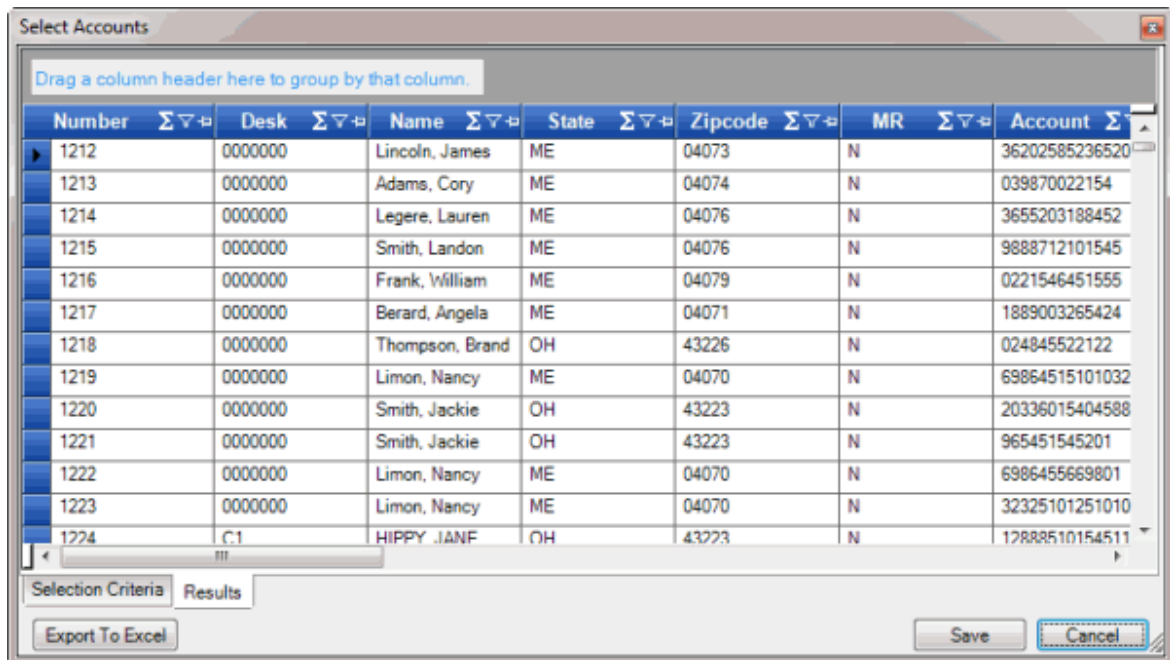
- The system sorts the groups in ascending order by default. To change the sort for a group, click the group heading.
- To delete a group, click the group heading and drag and drop it back into the query results space.

Filter Query Results

Use the **Results** tab in the **Select Accounts** window to filter query results.

To filter query results

- With the **Select Accounts** window open, in the toolbar, click **Run**. The results appear on the **Results** tab.



- In the column to filter, click the Funnel icon. A list of options for the specified column appears.

Customer	SSN
(All)	
(Custom)	
(Blanks)	
(NonBlanks)	999887777
0000000	999988777
0000001	124588812
0000002	789787897
0000003	
0000000	

(All): If selected, the system didn't filter the results.

(Custom): If selected, allows you to set custom filtering conditions.

(Blanks): If selected, the system limits the results to accounts with a blank or null value in the specified column.

(NonBlanks): If selected, the system limits the results to accounts that don't have a blank or null value in the specified column.

3. Click any value other than **(Custom)**. The list closes and the query results only include the records that match the specified filter.
4. To set custom filter criteria, do the steps to [Set Custom Filter Criteria](#).

Summarize Query Data

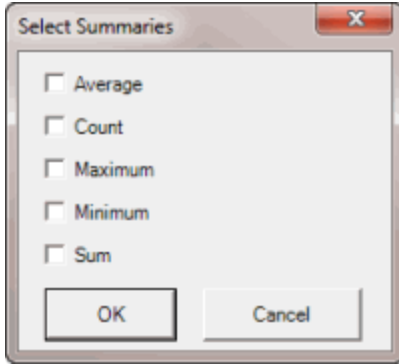
Use the **Results** tab in the **Select Accounts** window to summarize query results.

To summarize query data

1. With the **Select Accounts** window open, in the toolbar, click **Run**. The results appear on the **Results** tab.

Number	Desk	Name	State	Zipcode	MR	Account
1212	0000000	Lincoln, James	ME	04073	N	36202585236520
1213	0000000	Adams, Cory	ME	04074	N	039870022154
1214	0000000	Legere, Lauren	ME	04076	N	3655203188452
1215	0000000	Smith, Landon	ME	04076	N	9888712101545
1216	0000000	Frank, William	ME	04079	N	0221546451555
1217	0000000	Berard, Angela	ME	04071	N	1889003265424
1218	0000000	Thompson, Brand	OH	43226	N	024845522122
1219	0000000	Limon, Nancy	ME	04070	N	69864515101032
1220	0000000	Smith, Jackie	OH	43223	N	20336015404588
1221	0000000	Smith, Jackie	OH	43223	N	965451545201
1222	0000000	Limon, Nancy	ME	04070	N	6986455669801
1223	0000000	Limon, Nancy	ME	04070	N	32325101251010
1224	C1	HIPPY, JANF	OH	43223	N	12888510154511

2. In the column heading, click the Sigma icon. The **Select Summaries** dialog box appears. The options available are based on the item's data type.



3. Select the calculations to perform on the data and then click **OK**. The result appears in the last row of the data grid. If you grouped data, the system calculates the data for each group and displays the results in the last row for each group.

	Customer	SSN	Balance (P+I)	Balance (P)	Queue
	0000010		1500.0000	1500.0000	015
	0000010		1025.0000	1000.0000	015
	0000010	999887777	26000.0000	25000.0000	015
	0000010	999988777	52000.0000	50000.0000	015
	0000010	124588812	15000.0000	15000.0000	875
	0000010	789787897	15000.0000	15000.0000	015
	0000010	555555555	5010.0000	5000.0000	015
	0000011		2020.0000	1000.0000	015
Grand Summaries				Average = 1527.71694..	

Export Query Results

Use the **Results** tab in the **Select Accounts** window to export the results of a query. The export function isn't available in certain query windows.

To export query results

1. With the **Select Accounts** window open, in the toolbar, click **Run**. The results appear on the **Results** tab.

Select Accounts

Drag a column header here to group by that column.

Number	Desk	Name	State	Zipcode	MR	Account
1212	0000000	Lincoln, James	ME	04073	N	36202585236520
1213	0000000	Adams, Cory	ME	04074	N	039870022154
1214	0000000	Legere, Lauren	ME	04076	N	3655203188452
1215	0000000	Smith, Landon	ME	04076	N	9888712101545
1216	0000000	Frank, William	ME	04079	N	0221546451555
1217	0000000	Berard, Angela	ME	04071	N	1889003265424
1218	0000000	Thompson, Brand	OH	43226	N	024845522122
1219	0000000	Limon, Nancy	ME	04070	N	69864515101032
1220	0000000	Smith, Jackie	OH	43223	N	20336015404588
1221	0000000	Smith, Jackie	OH	43223	N	965451545201
1222	0000000	Limon, Nancy	ME	04070	N	6986455669801
1223	0000000	Limon, Nancy	ME	04070	N	32325101251010
1224	C1	HIPPY, JANF	OH	43223	N	12888510154511

Selection Criteria Results

Export To Excel Save Cancel

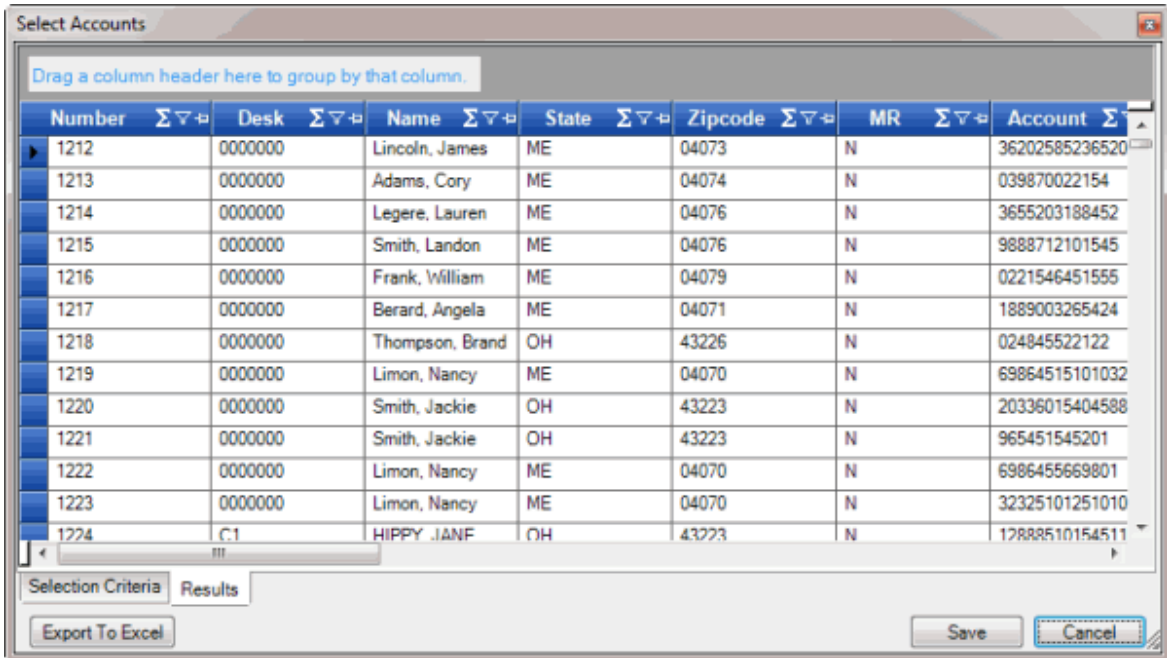
2. To export the results to a Microsoft Excel file, do the following:
 - a. Click **Export to Excel**. The **Save As** dialog box appears.
 - b. In the **File name** box, type a name for the file and then click **Save**.

Set Custom Filter Criteria

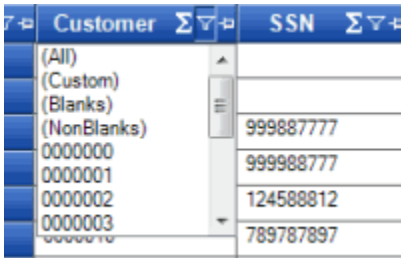
Use the **Enter Filter Criteria for...** dialog box to specify selection criteria for any column in the query results. You can combine selection criteria (or conditions) to create more complex filters. The full name of the dialog box is based on the column you are filtering.

To set custom filter criteria

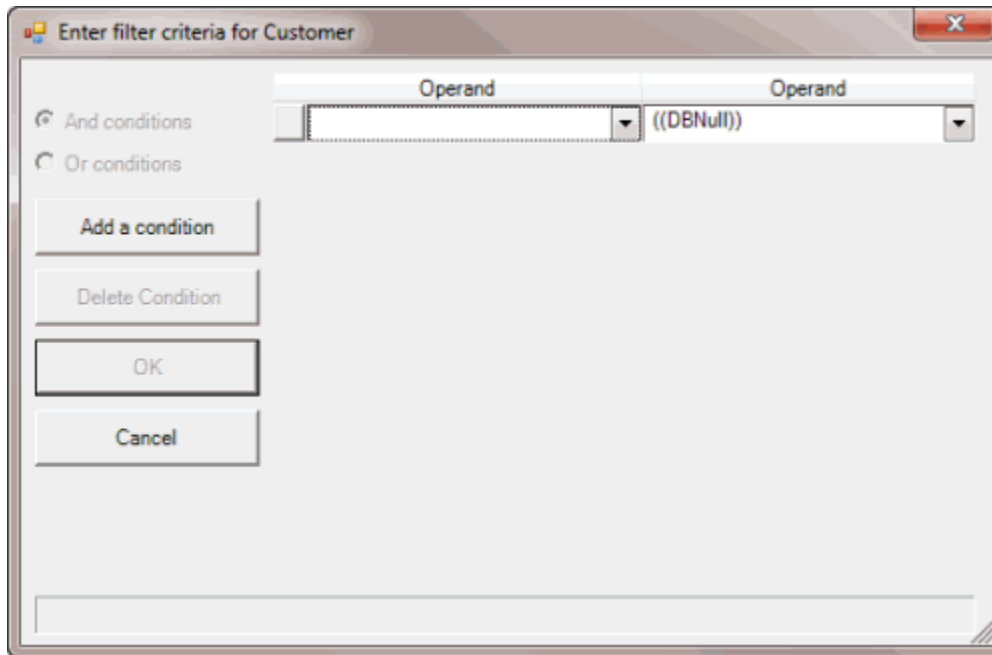
1. With the **Select Accounts** window open, in the toolbar, click **Run**. The results appear on the **Results** tab.



- In the column heading of the column to filter, click the Funnel icon. A list of options for the specified column appears.



- Click **(Custom)**. The **Enter Filter Criteria for...** dialog box appears. The following example shows the dialog box for the **Customer** column.



4. In the first **Operand** list box, click an operator. For more information, see [Custom Filter Operators](#).
5. In the **Operand** list box, click or type an operand. In the previous example, the operator is "= Equals" and the operand is "0000001 - CUSTOMER ONE." The condition appears in the lower portion of the dialog box.
6. To add conditions, click **Add a condition**. A blank row appears.
7. To delete a condition, click the condition and then click **Delete Condition**.
8. If you set multiple conditions, do one of the following:
 - To set the filter so that all the conditions have to be true for an account to appear in the query results, click **And conditions**. For example, customer does not equal "0000001 - CUSTOMER ONE" and customer does not equal "0000002 - CUSTOMER TWO" means that you want to see accounts for all customers except Customer One and Customer Two.
 - To set the filter so that only one condition has to be true for an account to appear in the query results, click **Or conditions**. For example, customer equals "0000001 - CUSTOMER ONE" or customer equals "0000002 - CUSTOMER TWO" means that you only want to see accounts for Customer One or Customer Two.
9. When finished creating the custom filter, click **OK**.

Custom Filter Operations

The following table describes the operators that are available when setting custom filter criteria for query results. The operators available for a data item are based on the item's data type.

Operator	Description
Equals	Retrieves accounts where the data matches the specified value.

Operator	Description
Does not equal	Retrieves accounts where the data does not match the specified value.
Less than	Retrieves accounts where the data is less than the specified value. This operator is for date and numeric data types only.
Less than or equal To	Retrieves accounts where the data is less than or equal to the specified value. This operator is for date and numeric data types only.
Greater than	Retrieves accounts where the data is greater than the specified value. This operator is for date and numeric data types only.
Greater than or equal To	Retrieves accounts where the data is greater than the specified value. This operator is for date and numeric data types only.
Like	Retrieves accounts where data matches the specified pattern. This operator is for alphanumeric data types only.
Matches Regular Expression	Retrieves accounts where the system stores data in the specified format. This operator is for alphanumeric data types only. ^[A-Z] finds all values in uppercase character format only. ^[a-z] finds all values in lowercase character format only. ^[0-9] finds all values in numeric format only. ^[A-Za-z] finds all values in mixed case character format. ^[A-Za-z] finds all values in mixed case character format. ^[^0-9]+\$ finds all values with a numeric format and dollar sign. ^[A-Za-z0-9] [A-Za-z0-9_]*\$ finds all values of mixed case and currency.
Starts with	Retrieves accounts where data starts with the specified character or characters. This operator is for alphanumeric data types only.
Contains	Retrieves accounts where data contains the specified character or characters. This operator is for alphanumeric data types only.
Ends with	Retrieves accounts where data ends with the specified character or characters. This operator is for alphanumeric data types only.
Does not start with	Retrieves accounts where data does not start with the specified character or characters. This operator is for alphanumeric data types only.
Does not contain	Retrieves accounts where data does not contain the specified character or characters. This operator is for alphanumeric data types only.
Does not end with	Retrieves accounts where data does not end with the specified character or characters. This operator is for alphanumeric data types only.

Operator	Description
Does not match	Retrieves accounts where data does not match the specified character or characters. This operator is for alphanumeric data types only.
Not like	Retrieves accounts where data is not like the specified pattern. This operator is for alphanumeric data types only.

Create a Vendor Package

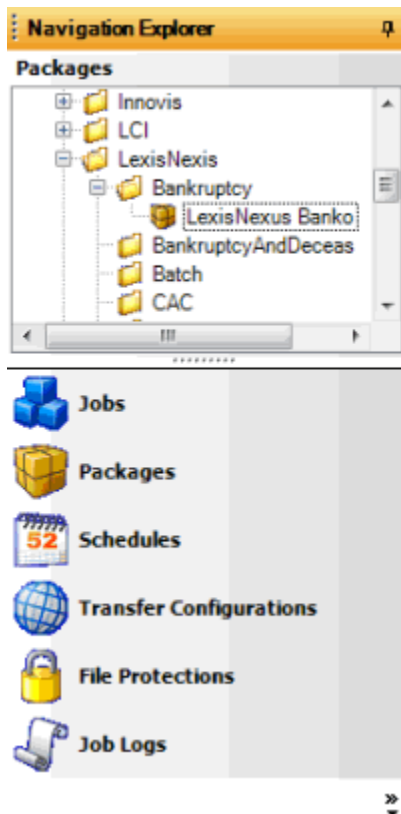
Use the **Package - [Package Name]** tab to create a vendor package to automate a manual process for a vendor service (for example, a request for a credit bureau report). The package creates and sends vendor request files, and downloads and processes vendor return files. You can create several packages within the same folder based on different query criteria and extracted information. For example, you can set up a package to request vendor items for higher balance accounts or set up a package for accounts assigned to specific customer.

Before creating a vendor package, ensure that your organization defined the query configuration, transfer configuration, and, if necessary, file protection configuration.

Note: Maintain the import mapping for each package in Exchange. The Fusion folder in Exchange contains the Exchange vendor clients. Fusion imports files using these Exchange clients.

To create a vendor package

1. In the **Navigation Explorer** pane, click **Packages**. The **Packages** panel appears.



2. Right-click the folder that represents the vendor service, click **Add**, and then click **Add Package**.
3. Type a name for the package and then press **Enter**.
4. Do one of the following:
 - Right-click the package and then click **Properties**.
 - Double-click the package.

The **Package - [Package Name]** tab appears, with the **General** tab selected. Job Manager includes the name of the package in the tab name.

The screenshot shows a dialog box titled "Package - New Package 1". It has two tabs: "General" and "Package". The "General" tab is selected. The dialog contains the following fields and options:

- Name:** A text box containing "New Package 1".
- Description:** An empty text box.
- Query Configuration:** A dropdown menu with "Choose a Saved Query..." and a downward arrow.
- Transfer Configuration:** A dropdown menu with "Choose a Transfer Configuration..." and a downward arrow.
- Protection Configuration:** A dropdown menu with "Choose a Protection Configuration..." and a downward arrow.
- Allow On Previously Requested Accounts
- Include Co-Debtors on Requests
- Pickup All Pending (Workflow and Panel Requests)

Name: Name of the package as specified in the **Packages** panel. To modify the name, rename it in the **Packages** panel.

Description: Description of the package.

Query Configuration: Query to use to select accounts for processing. The available queries include ones created in Job Manager and Latitude.

Transfer Configuration: Configuration to use to send files to and receive files from the vendor.

Protection Configuration: Configuration to use for encrypting and decrypting files sent to and received from the vendor, if necessary.

Allow on Previously Requested Accounts: If selected, Job Manager includes accounts that you requested for this service previously. If cleared, Job Manager excludes accounts that you requested previously.

Include Co-Debtors on Requests: If selected, Job Manager includes co-debtors in the request for this service. If cleared, Job Manager only includes the primary debtor.

Pickup All Pending (Workflow and Panel Requests): If selected, Job Manager includes pending requests that WorkFlow generated, and pending requests that users generated in Latitude. If cleared, Job Manager excludes pending requests.

5. Complete the information and then click the **Package** tab. The vendor settings appear on the **Package** tab. The information available on this tab is based on the selected vendor product folder.

Package - CPE2 General

General Package

These settings are required to execute TransUnion CPE.

Bureau Market:

Bureau SubMarket:

Industry Code:

Member Code:

Subscriber Password:

Special Routing Indicator:

Do you wish to send the EU01 segment, If so, the next two policies need to be populated

Permissible Purpose Code (Required for the EU01 segment):

End User Name (Required for the EU01 segment):

- Specify the package settings and then, in the toolbar, click **Save**.

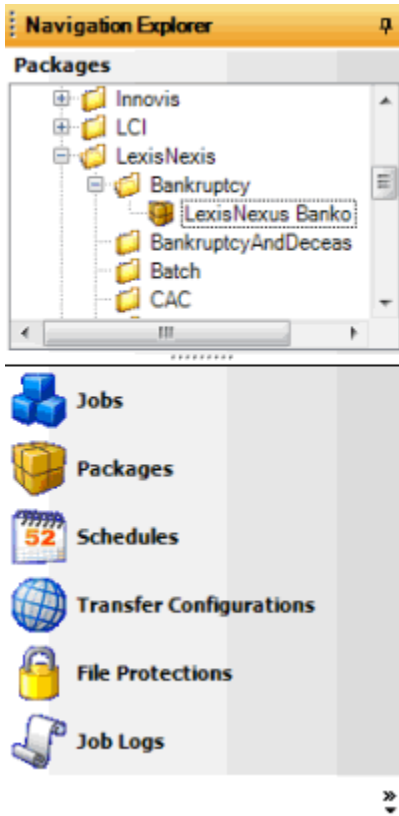
Note: To obtain specific instructions and values, contact your vendor representative.

Modify a Vendor Package

Use the **Package - [Package Name]** tab to modify a vendor package that automates a manual process for a vendor service (for example, a request for a credit bureau report).

To modify a vendor package

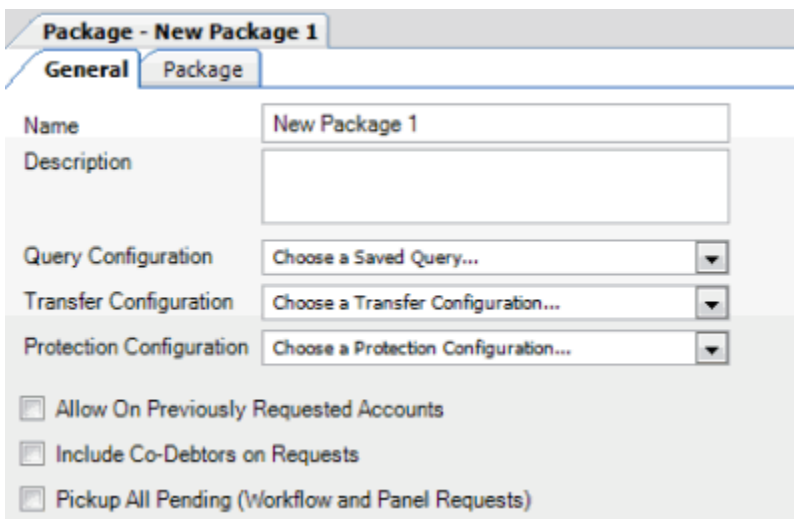
- In the **Navigation Explorer** pane, click **Packages**. The **Packages** panel appears.



2. Do one of the following:

- Right-click the package and then click **Properties**.
- Double-click the package.

The **Package - [Package Name]** tab appears, with the **General** tab selected. Job Manager includes the name of the package in the tab name.



Name: Name of the package as specified in the **Packages** panel. To modify the name, rename it in the **Packages** panel.

Description: Description of the package.

Query Configuration: Query to use to select accounts for processing.

Transfer Configuration: Configuration to use to send and receive files.

Protection Configuration: Configuration to use for encrypting and decrypting files, if necessary.

Allow on Previously Requested Accounts: If selected, Job Manager includes accounts that you requested for this service previously. If cleared, Job Manager excludes accounts that you requested previously.

Include Co-Debtors on Requests: If selected, Job Manager includes co-debtors in the request for this service. If cleared, Job Manager only includes the primary debtor.

Pickup All Pending (Workflow and Panel Requests): If selected, Job Manager includes pending requests that WorkFlow generated, and pending requests that users generated in Latitude. If cleared, Job Manager excludes pending requests.

3. Modify the information as necessary and then click the **Package** tab. The information available on this tab is based on the selected vendor product folder.

Package - CPE2 General

General Package

These settings are required to execute TransUnion CPE.

Bureau Market:

Bureau SubMarket:

Industry Code:

Member Code:

Subscriber Password:

Special Routing Indicator:

Do you wish to send the EU01 segment, If so, the next two policies need to be populated

Permissible Purpose Code (Required for the EU01 segment):

End User Name (Required for the EU01 segment):

4. Modify the package settings as necessary and then, in the toolbar, click **Save**.

Note: To obtain specific instructions and values, contact your vendor representative.

Schedule Configuration

Schedule Configuration

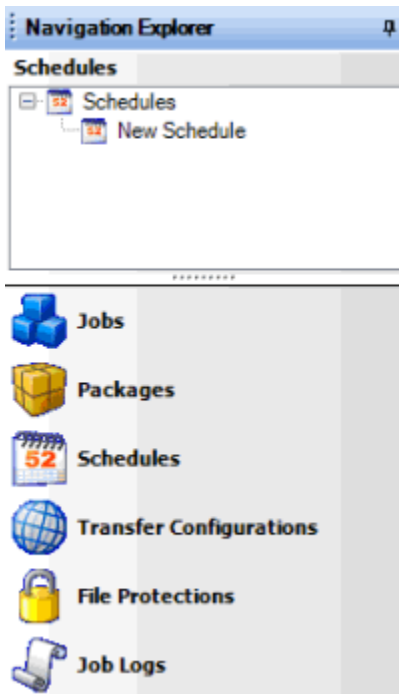
Use the **Schedules** panel in the **Navigation Explorer** pane to create and maintain folders to organize schedules. From this panel, you can open the **Schedule Properties - [Schedule Name]** tab in the **Information** pane to add, modify, and test a schedule configuration. You associate a schedule to a job to indicate when to run the job. You can associate a schedule to multiple jobs. However, if the frequency with which you run import and export jobs differs, create separate schedules to associate to the jobs.

Create a Schedule

Use the **Schedule Properties - [Schedule Name]** tab to create a schedule for running jobs. You can assign multiple jobs to a single schedule. For more information, see [Create a Job Configuration](#) and [Modify a Job Configuration](#).

To create a schedule

1. In the **Navigation Explorer** pane, click **Schedules**. The **Schedules** panel appears.



2. To create a folder for the new schedule, do the following:
 - a. Right-click **Schedules**, click **Add**, and then click **Add Folder**.
 - b. Type a name for the folder and then press **Enter**.
3. Right-click the folder where you want to add the schedule, click **Add**, and then click **Add Schedule**.
4. Type a name for the schedule and then press **Enter**.
5. Do one of the following:
 6. Right-click the schedule and then click **Schedule Properties**.
 7. Double-click the schedule.

The **Schedule Properties - [Schedule Name]** tab appears. Job Manager includes the name of the schedule in the tab name.

Schedule Properties - New Schedule

General

Name:

Description:

Scheduled Time

Date:

Time:

Occurs Every

Never Between

Recurrence Pattern

Daily Sunday Monday Tuesday Wednesday

Monthly Thursday Friday Saturday

Test

Next: Occurrences

General

Name: Name of the schedule as specified in the **Schedules** panel. To modify the name, rename it in the **Schedules** panel.

Description: Description of the schedule.

Scheduled Time

Date: Date that jobs associated to this schedule start running. To schedule a job to start running today, specify a date in the past.

Time: Time that jobs associated to this schedule start running.

Occurs Every: If selected, jobs associated to this schedule run for the specified frequency. For example, to run a job multiple times each day, select this check box and then specify the interval (for example, 15 minutes, 12 Hours). If cleared, jobs associated to this schedule run once each day.

Never Between: If selected, Job Manager prevents jobs associated to this schedule from running between the specified start and end times. This setting is useful when you don't want processing to occur during certain work hours. If cleared, Job Manager doesn't prevent the scheduled from running during a certain time period.

Recurrence Pattern

Daily: If selected, jobs associated to this schedule run on the specified days of the week.

Monthly: If selected, jobs associated to this schedule run once each month on the specified day of the month. The available days do not extend beyond 28. To capture month-end data for months with more than 28 days, select the first day of the month so that Job Manager includes the days beyond the 28th of the month.

Test

Next: Number of occurrences of this schedule for which to view forecasted run dates and times.

8. Complete the information and then, in the toolbar, click **Save**.

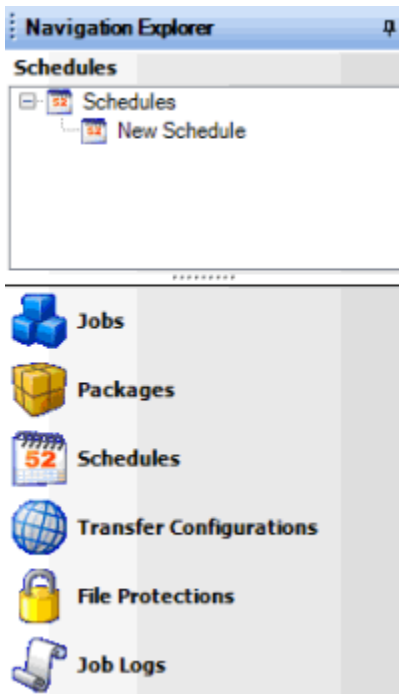
Note: To test the schedule configuration, see [Test a Schedule](#).

Modify a Schedule

Use the **Schedule Properties - [Schedule Name]** tab to modify a schedule for running jobs.

To modify a schedule

1. In the **Navigation Explorer** pane, click **Schedules**. The **Schedules** panel appears.



2. Do one of the following:
 - Right-click the schedule and then click **Schedule Properties**.
 - Double-click the schedule.

The **Schedule Properties - [Schedule Name]** tab appears. Job Manager includes the name of the schedule in the tab name.

Schedule Properties - New Schedule

General

Name:

Description:

Scheduled Time

Date:

Time:

Occurs Every

Never Between

Recurrence Pattern

Daily Sunday Monday Tuesday Wednesday

Monthly Thursday Friday Saturday

Test

Next: Occurrences

General

Name: Name of the schedule as specified in the **Schedules** panel. To modify the name, rename it in the **Schedules** panel.

Description: Description of the schedule.

Scheduled Time

Date: Date that jobs associated to this schedule start running. To schedule a job to start running today, specify a date in the past.

Time: Time that jobs associated to this schedule start running.

Occurs Every: If selected, jobs associated to this schedule run for the specified frequency. For example, to run a job multiple times each day, select this check box and then specify the interval (for example, 15 minutes, 12 Hours). If cleared, jobs associated to this schedule run once each day.

Never Between: If selected, Job Manager prevents jobs associated to this schedule from running between the specified start and end times. This setting is useful when you don't want processing to occur during certain work hours. If cleared, Job Manager doesn't prevent the scheduled from running during a certain time period.

Recurrence Pattern

Daily: If selected, jobs associated to this schedule run on the specified days of the week.

Monthly: If selected, jobs associated to this schedule run once each month on the specified day of the month. The available days do not extend beyond 28. To capture month-end data for months with more than 28 days, select the first day of the month so that Job Manager includes the days beyond the 28th of the month.

Test

Next: Number of occurrences of this schedule for which to view forecasted run dates and times.

3. Modify the information as necessary and then, in the toolbar, click **Save**.

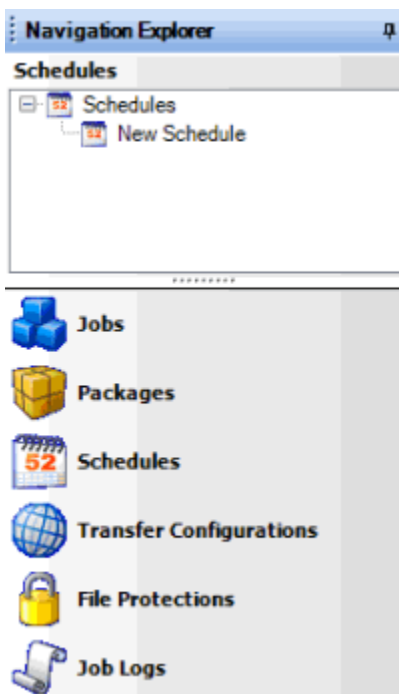
Note: To test the schedule configuration, see [Test a Schedule](#).

Test a Schedule

Use the **Schedule Properties - [Schedule Name]** tab to view the forecasted run dates and times for a schedule.

To test a schedule

1. In the **Navigation Explorer** pane, click **Schedules**. The **Schedules** panel appears.



2. Do one of the following:
 - Right-click the schedule and then click **Schedule Properties**.
 - Double-click the schedule.

The **Schedule Properties - [Schedule Name]** tab appears. Job Manager includes the name of the schedule in the tab name.

3. In the **Test** section, in the **Next** box, type or select the number of occurrences of this schedule to test.
4. In the toolbar, click **Test**. The forecasted run dates and times for the specified number of occurrences appears in the data grid.

Day	Date	Time
Friday	4/12/2013	12:00 AM
Monday	4/15/2013	12:00 AM
Tuesday	4/16/2013	12:00 AM

Job Configuration

Job Configuration

Use the **Jobs** panel in the **Navigation Explorer** pane to create and maintain folders to organize job configurations. From this panel, you can open the **Job - [Job Configuration Name]** tab in the **Information** pane to add or modify a job configuration. A job configuration consists of integrated components that vary based on the type of job (for example, Exchange, AIM, vendor services). A job is identified with the following (typically):

- **Schedule** - Defines when the job runs.

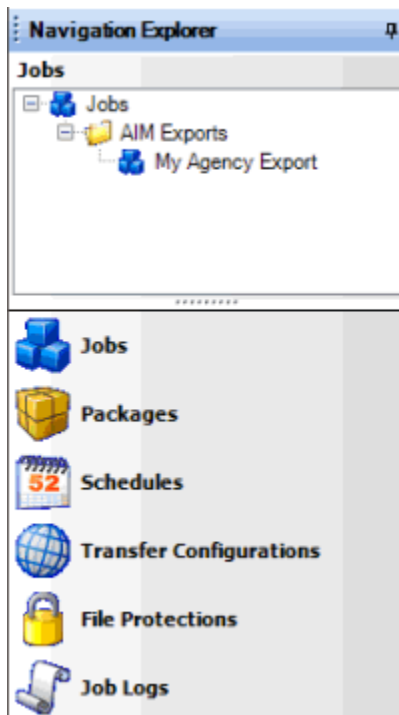
- **Transfer Configuration** - Defines the location of the files to process, and the file naming convention.
- **Package** or **Process** - Defines the encryption method and, for export jobs, the query that selects records for export. A package is for vendor services and a process is for Exchange or AIM.

Create a Job Configuration

Use the **Job - [Job Configuration Name]** tab to create a job configuration to automate a manual process (for example, AIM file import, Exchange file export).

To create a job configuration

1. In the **Navigation Explorer** pane, click **Jobs**. The **Jobs** panel appears.



2. To create a folder for the new job, do the following:
 - a. Right-click **Jobs**, click **Add**, and then click **Add Folder**.
 - b. Type a name for the folder and then press **Enter**.
3. Right-click the folder where you want to add the job, click **Add**, and then click **Add Job**.
4. Type a name for the job and then press **Enter**.
5. Do one of the following:
6. Right-click the job and then click **Job Properties**.
7. Double-click the job.

The **Job - [Job Configuration Name]** tab appears. Job Manager includes the name of the job configuration in the tab name.

Name: Name of the job configuration as specified in the **Jobs** panel. To modify the name, rename it in the **Jobs** panel.

Description: Description of the job configuration.

Category: Job configuration category. For more information, see [Job Categories](#).

Package/Process: Package or process to automate. The values that appear are based on the specified job configuration category.

Schedule: Schedule for running the job.

Dependent Job: Job that has to complete before this job can start. Not all jobs have a dependent job.

Enabled: If selected, Job Manager allows the job to run. If cleared, Job Manager prevents the job from running.

Scheduled: If selected, the schedule is active for the job. If cleared, Job Manager prevents the job from running.

Email Upon Error: If selected, Job Manager sends an email message to the specified email addresses when errors occur during processing.

Email Upon Success: If selected, Job Manager sends an email message to the specified email addresses when processing completes successfully.

Note: To specify more than one email address, use a semi-colon to separate the email addresses.

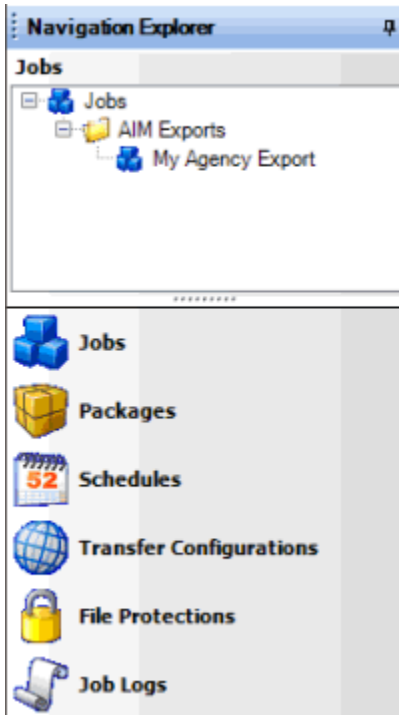
- Complete the information and then, in the toolbar, click **Save**.

Modify a Job Configuration

Use the **Job - [Job Configuration Name]** tab to modify a job configuration that automates a manual process (for example, AIM file import, Exchange file export).

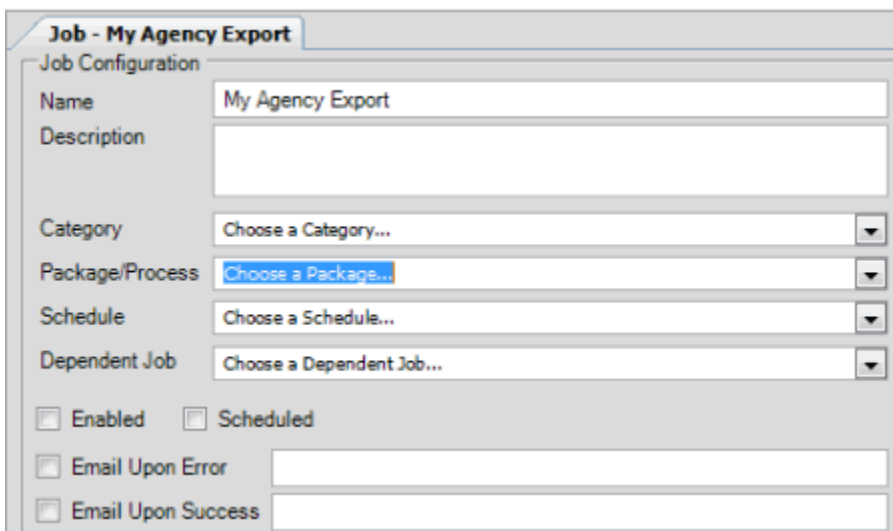
To modify a job configuration

1. In the **Navigation Explorer** pane, click **Jobs**. The **Jobs** panel appears.



2. Click the plus sign (+) to expand the folder where the job is located.
3. Do one of the following:
 - Right-click the job and then click **Job Properties**.
 - Double-click the job.

The **Job - [Job Configuration Name]** tab appears. Job Manager includes the name of the job configuration in the tab name.



Name: Name of the job configuration as specified in the **Jobs** panel. To modify the name, rename it in the **Jobs** panel.

Description: Description of the job configuration.

Category: Job configuration category. For more information, see [Job Categories](#).

Package/Process: Package or process to automate. The values that appear are based on the specified job configuration category.

Schedule: Schedule for running the job.

Dependent Job: Job that has to complete before this job can start. Not all jobs have a dependent job.

Enabled: If selected, Job Manager allows the job to run.

Scheduled: If selected, the schedule is active for the job.

Email Upon Error: If selected, Job Manager sends an email message to the specified email address when errors occur during processing.

Email Upon Success: If selected, Job Manager sends an email message to the specified email address when processing completes successfully.

4. Modify the information as necessary and then, in the toolbar, click **Save**.

Job Categories

Job categories define which packages and processes are available for selection when you create a job configuration. The following job categories are available:

- **AIM Export Job:** Automates exporting files to send to outside collection agencies and attorneys, based on settings in AIM.
- **AIM Import Job:** Automates importing files received from outside collection agencies and attorneys, based on settings in AIM.
- **AIM Placement Business Rule:** Automates placing accounts with outside collection agencies and attorneys, based on settings in AIM.
- **Dialer Job:** Not used.
- **Exchange Export Job:** Automates export processes defined in Exchange.
- **Exchange Import Job:** Automates import processes defined in Exchange.
- **SQL Job:** Not used.
- **Vendor Service Export Job:** Automates creating and exporting files to outside vendors (for example, credit bureaus).
- **Vendor Service Import Job:** Automates importing files received from outside vendors (for example, credit bureaus).
- **YGC Export:** Not used.

AIM Jobs

You can use Job Manager to schedule export, import, or account placement processes that your organization defined in AIM to run automatically. Create a separate job configuration for each AIM

agency and attorney that supports automation. Before creating a job configuration, ensure that your organization defined an export file layout, import file layout, or account placement business rule in AIM. For more information about AIM, see the AIM documentation.

Exchange Jobs

Exchange Jobs

You can use Job Manager to schedule Exchange jobs to run automatically. You define clients and export and import processes in Exchange before creating the job configuration in Job Manager. The process configuration can include one file type for one client, one file type for multiple clients, multiple file types for one client, or multiple file types for multiple clients. For example, a client can send you new business and financial updates in either a single file or two separate files. You define the transfer configuration (required) and file protection configuration (optional) in Exchange, and associate the configurations to the process in Exchange.

Usually, Job Manager processes export and import jobs independently of one another. Therefore, when you define an export job, Job Manager doesn't require you to define a corresponding import job.

For more information about Exchange, see the *Exchange* documentation.

Create a Process Configuration in Exchange

The following table provides the high-level steps for creating import and export process configurations in Exchange. Define separate process configurations for imports and exports as a process configuration cannot contain both. You can, however, include up to four file types (for example, new business, financial transactions) in a process configuration. If you do include more than one file type, the order in which Job Manager processes files is important. For example, if you have a configuration that includes new business and financial transactions, order the new business import first. If the financial import runs first and it contains accounts that are in the new business import, Job Manager doesn't update the new business records because they aren't in the system yet.

For more information, see the *Exchange* documentation.

Step	Action
1	Create or open an existing process configuration.
2	Provide a name and description of the process configuration.
3	Select an owner client.
4	Select a transfer configuration.
5	If necessary, select a file protection configuration.
6	Indicate whether the process type is import or export.
7	Select a client and an interface (file type) to add to the configuration.
8	If necessary, select more clients and interfaces to add to the configuration.
9	If necessary, modify the order in which the processes appear in the data grid.
10	Save the process configuration.

Create an Exchange Job

The following table provides the high-level steps for creating a job to automate Exchange processing. For more information, see [Job Configuration](#) and the *Exchange* documentation.

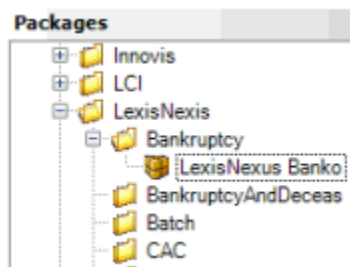
Step	Program	Action
1	Job Manager	Create a transfer configuration for exchanging files with the client. You can use the same transfer configuration for export and import processes.
2	Job Manager (optional)	Create a file protection configuration to use when exchanging files with the client.
3	Exchange	Create clients to handle processing of files into or out of Latitude.
4	Exchange	Define an import or export process that specifies the process type, transfer configuration, file protection configuration (if necessary), clients, and file types.
5	Job Manager	Create a schedule that defines when the process runs.
6	Job Manager	Create a job that specifies the job category (based on the process type), process to run and the schedule.

Vendor Service Jobs

Vendor Service Jobs

Vendor services include the multiple types of debtor and account information requested from outside sources that provide detailed information upon request. These services include skip tracing (update of debtor contact information), "scrubbing" for bankruptcy or deceased (probate) information, credit data and scoring, legal activity, and many others. Job Manager generates requests through exporting a file of information to the service, and importing the new or updated information received from the service provider.

In Job Manager, you schedule vendor service jobs using packages to create request files, and download and process return files. Latitude by Genesys provides standard vendor service configurations that are displayed in Job Manager as folders in the **Packages** panel.

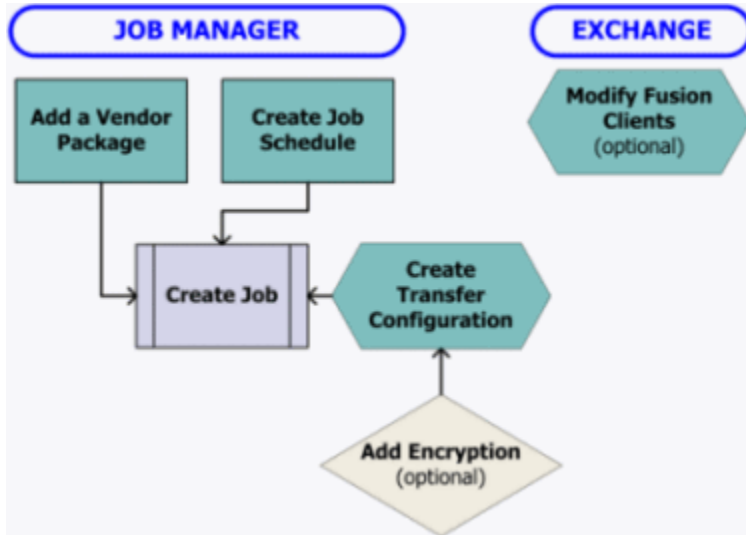


Your organization creates these configurations in Exchange as Fusion Clients (mapping configurations). The Fusion web service adds the configurations to Job Manager.

You create packages in Job Manager for each vendor service to which your organization subscribes. You can create multiple packages for a specific service, based on different query criteria and extracted information. For example, you can request more services from a vendor product for higher balance accounts or those accounts belonging to specific customers. Import jobs provide the information that an

export job requested. Therefore, when you create an export job, Job Manager requires you to create a corresponding import job.

The following diagram represents the relationship between elements in Job Manager and Exchange when configuring a vendor service job.



Vendor service information returned through a vendor import job is displayed in Latitude for each account that has information. You can use the vendor Exchange client to map fields to update addresses, phone numbers, and other information in Latitude.

Create a Vendor Service Job

The following table provides an overview of the steps for creating a vendor service job. For more information, see [Job Configuration](#). Job Manager requires a separate job for vendor service exports and imports.

Step	Program	Action
1	Exchange (optional)	Modify vendor mapping for the product under the Fusion folder.
2	Job Manager	Create a vendor transfer configuration for uploading and downloading files with the vendor. You can use the same transfer configuration for both processes.
3	Job Manager (optional)	Create a file protection configuration to use when exchanging files with the vendor using PGP encryption keys.
4	Job Manager or Account Analysis tool in Latitude	Create and save a query to retrieve accounts that you want to include when exporting vendor package requests.
5	Job Manager	Create a package configuration for the vendor service, incorporating the transfer configuration and, if necessary, the file protection configuration.
6	Job Manager	Create a schedule for running the job.
7	Job Manager	Create a job for the Vendor Service Import or Vendor Service Export job category and specify the package and schedule configurations.

Vendor Service Import Jobs

When you create and save a vendor service export job, Job Manager prompts you to create a corresponding import job. The vendor service import job is designed to check for information (import file) that the vendor created in response to the request (export) file. When Job Manager imports a vendor file, it updates information in Latitude. Exchange stores the mappings from the import file to Latitude as pre-configured clients in the Fusion folder.

Create the vendor service import job in the same way as the vendor service export job, with the following considerations:

- For identification purposes, include the vendor name, service, and the word "import" in the job name and description. (Use "export" for export jobs.)
- Specify **Vendor Service Import Job** as the job category.
- Specify the same package for import as for export.
- The path for uploading a request file can differ from the path for downloading a response file. If the paths differ, create a separate transfer configuration for the import job.
- The frequency with which Job Manager checks for a return file can differ from the frequency for exporting request files. If the frequency differs, create a separate schedule configuration for the import job.

Vendor Service Configuration and Exchange

Exchange includes standard vendor services in the Fusion folder in the **Clients** panel. Latitude by Genesys established these clients to handle the creation of request files and processing of return files for specific vendor products.

All vendor clients exist as maintenance imports. Originally, these clients were designed to run using Fusion. If your organization upgraded to Job Manager, vendor service clients are available for scheduling as packages. Run vendor services using either Fusion or Job Manager, not both.

Data returned from vendors is available in Latitude for each account that has information. If you require special processing (for example, updates to addresses or phone numbers) you can modify the mapping or create a post-processing stored procedure.

Fusion Jobs

Before Job Manager, Fusion was the only Latitude program available for exporting and importing vendor service files, and processing was manual. Job Manager automates the export and import tasks for unattended processing. If you use Job Manager, you no longer need Fusion.

Job Monitoring

Job Monitoring

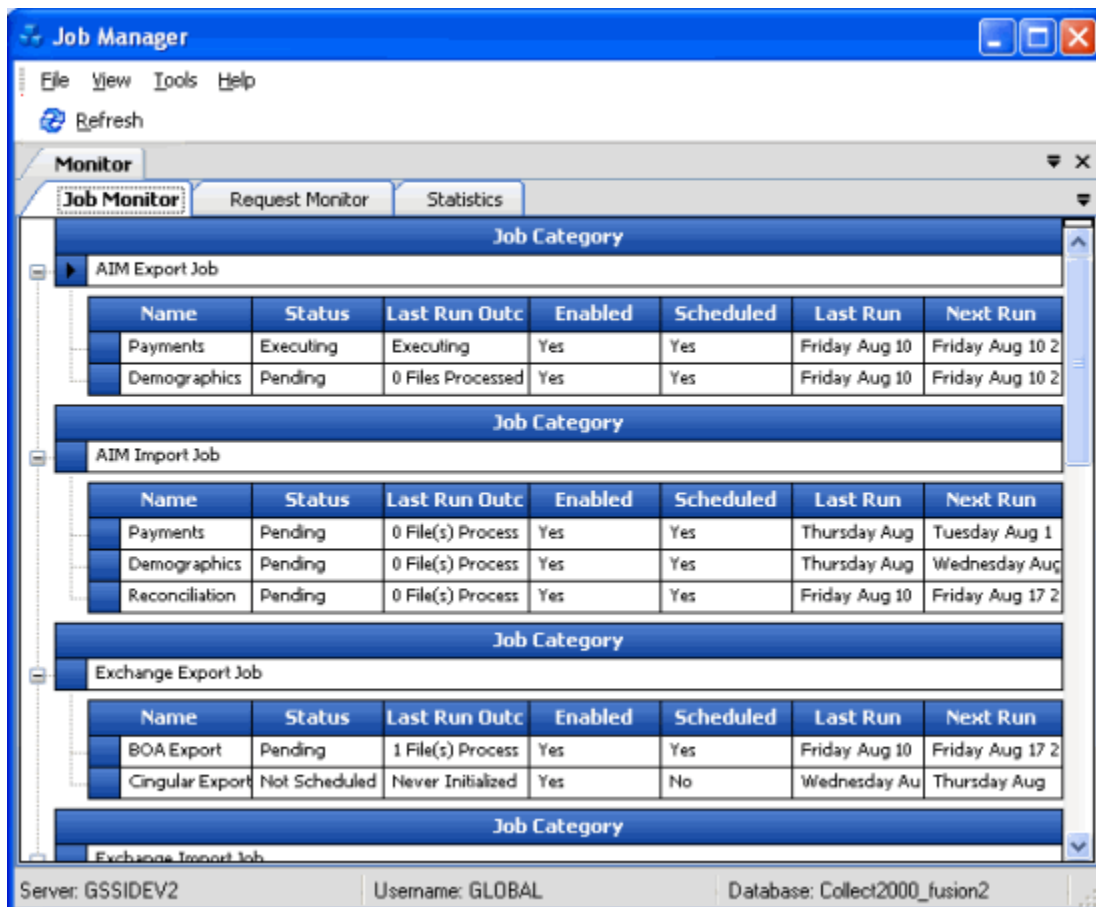
You can use the **Monitor** tab to view Job Manager activities and the **Calendar** tab to view upcoming scheduled jobs.

View Job Activity

Use the **Monitor** tab in the **Information** pane to view a snapshot of activity for the last and next occurrence of every job in Job Manager. Jobs display alphabetically by job category.

To view job activity

1. In the menu bar, click **View** and then click **Monitor Grid**. The **Monitor tab** appears in the **Information** pane. Jobs are grouped by job category.



Name: Name of the job.

Status: Status of the job.

Last Run Outcome: Results of the last job run. To view detail for an error that occurred during processing, rest your mouse on the error message.

Enabled: Indicates whether Job Manager allows the job to run.

Scheduled: Indicates whether the schedule is active for the job.

Last Run: Date Job Manager last ran the job.

Next Run: Date Job Manager scheduled the job to run next.

2. To view jobs within a job category, click the plus sign (+) next to the job category.

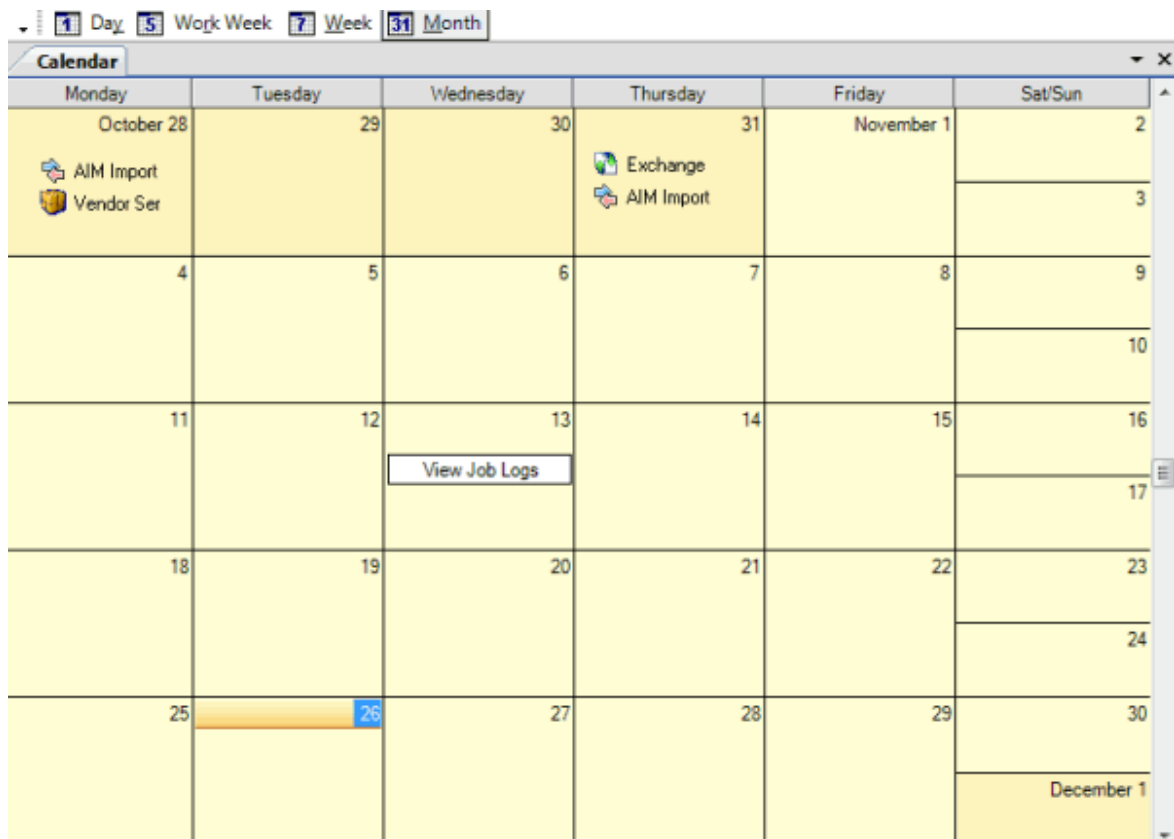
- To view requested jobs, click the **Request Monitor** tab.
- To view statistical information, click the **Statistics** tab.

View Scheduled Jobs in Calendar Format

Use the **Calendar** tab in the **Information** pane to view upcoming scheduled jobs. You can view the jobs scheduled on a single day, a five-day work week, an entire seven-day week, or a month. You can also add and delete appointments, and set reminders for the appointments. For more information, see [Add an Appointment](#) and [Modify an Appointment](#).

To view scheduled jobs in calendar format

- In the menu bar, click **View** and then click **Monitor Calendar**. The **Calendar** tab appears in the **Information** pane. The following example shows jobs scheduled for Monday, October 28 and Thursday, October 31. It also shows an appointment scheduled for Wednesday, November 13.



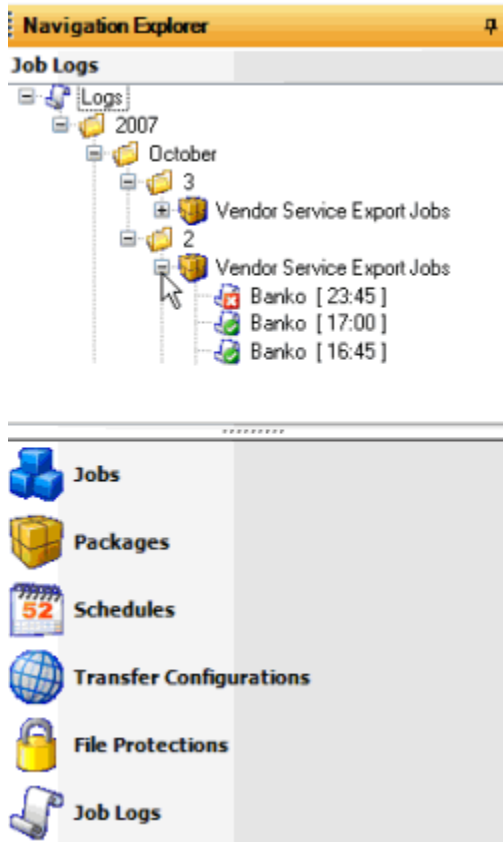
- To change the calendar view, in the toolbar, do the following:
 - To view jobs scheduled for the current day, click **Day**.
 - To view jobs scheduled for the current five-day work-week, click **Work Week**.
 - To view jobs scheduled for the current seven-day week, click **Week**.
 - To view jobs scheduled for the current month, click **Month**.

View a Job Log

Use the **Job Logs** panel to view processing and file transfer history for scheduled jobs.

To view a job log

1. In the **Navigation Explorer** pane, click **Job Logs**. The **Job Logs** panel appears.



2. To view job logs for a job category for a specific date, click the plus signs (+) to expand the folders. A green check mark indicates that the job completed successfully. A red X indicates that the job failed.
3. To view detail for a job, do the following:
 - a. In Job Manager, do the steps to [View Job Activity](#).
 - b. For an Exchange job, you can also open Exchange and view the **History** tab for a client.
 - c. For a vendor service job, you can also open Exchange and view the **History** tab for a client in the Fusion folder.

Note: For more information, see the *Exchange* documentation.

View Files on the Local File Share

In each transfer configuration, you can specify a location to store a copy of the import or export file locally. You can use these copied files:

- As a backup if a job fails to place a file when an export job runs.

- As another source of processing history.
- To confirm that records are processing as required.

To view files on the local file share

1. Open the folder on the local file share where the files are stored.
2. Verify that the files exist.

Use Email to Monitor Activity

In each job configuration, you can specify one or more email addresses to receive notification when jobs complete successfully or produce an error. Best practices for email notifications are as follows:

- Email notifications for jobs that complete successfully are helpful for new jobs. You can discontinue the notifications once jobs run error-free routinely.
- Email notifications for failed jobs describe the failure in detail, which is useful for correcting the errors and running the job successfully. Specify at least one email address to receive notification for failed jobs.