



# Document Exporter

## Printable Help

Version 12.0

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### **Abstract**

This document is a printable version of Document Exporter help.

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## Introduction to Document Exporter

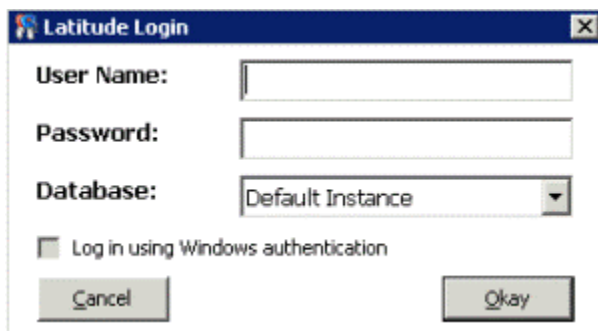
Document Exporter allows you to export documents attached to accounts in Latitude. You can export multiple documents for multiple accounts in a single export process. These documents are available in the **Documentation** panel in the **Work Form** in Latitude. For more information about the **Documentation**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

## Log on to Document Exporter

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

### To log on to Document Exporter

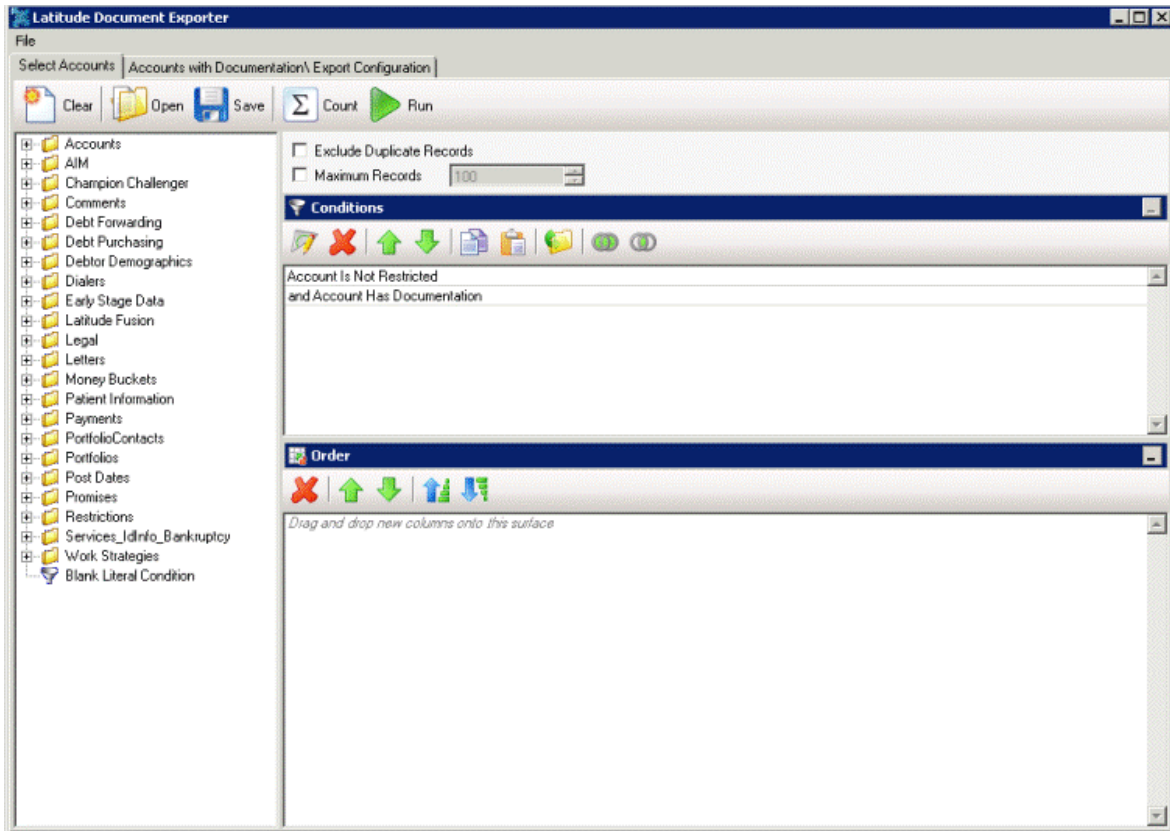
1. Click **Start > All Programs > Interactive Intelligence > Interaction Collector > Latitude Document Exporter**. The **Latitude Login** dialog box appears.



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

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

4. Click **Okay**. The **Latitude Document Exporter** window appears.



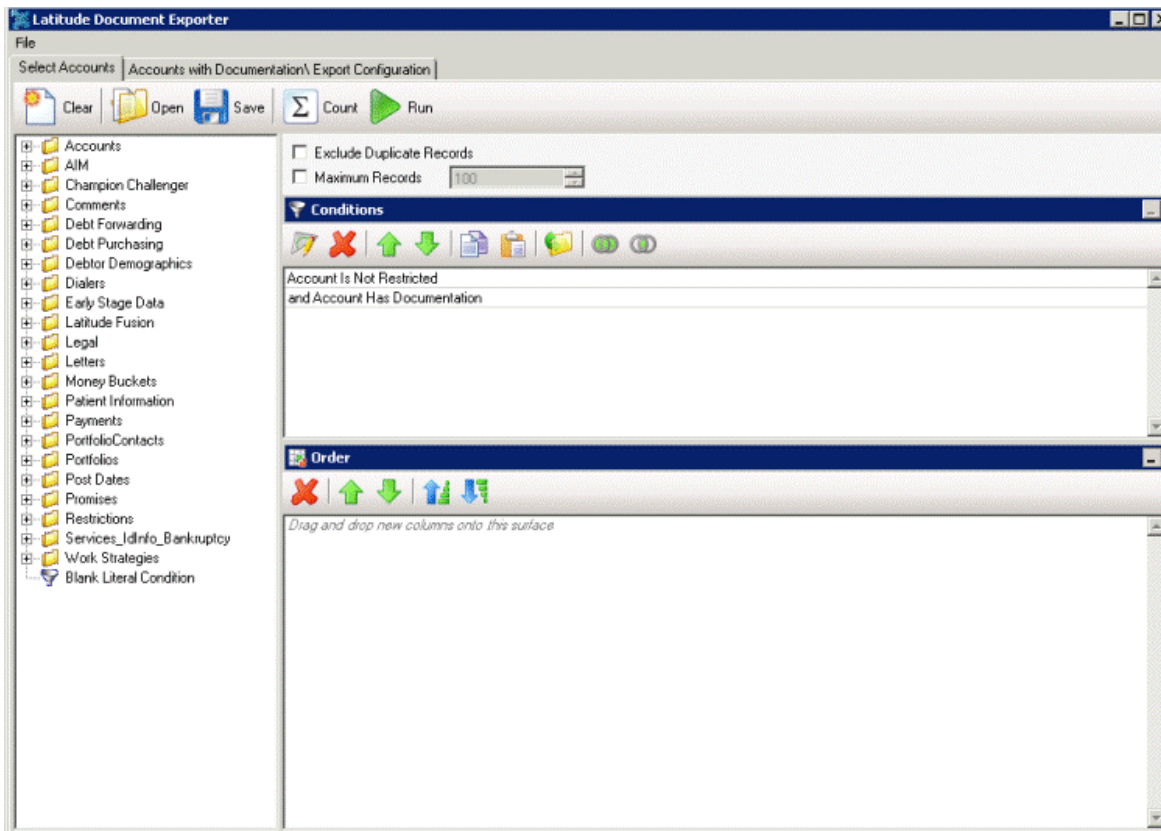
## Select Accounts

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

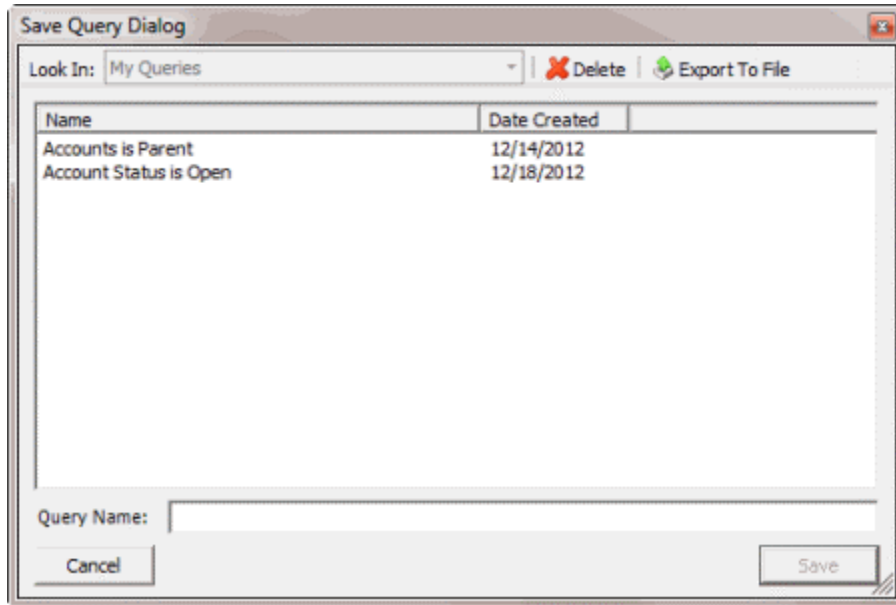
**Note:** These instructions are for creating a query. You can also open an existing query to select accounts. For more information about working with queries, see "Queries" in the *Latitude* documentation.

### To select accounts

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



2. To exclude duplicate records from the query results, select **Exclude Duplicate Records**.
3. To limit the query results to a specific number of records, select **Maximum Records** and then, in the box, type the maximum number of records to include in the results.
4. In the **Conditions** pane, do the following as necessary to specify the query conditions:
  - a. Drag and drop one or more conditions into the **Conditions** pane.
  - b. Arrange the order of the conditions.
  - c. Group conditions for evaluation.
5. In the **Order** pane, do the following as necessary to specify the sort order for the data returned in the query results:
  - a. Drag and drop one or more data items to use to sort the query results into the **Order** pane.
  - b. Arrange the order of the data items.
  - c. Click the data item and then click the Ascending or Descending icon.
6. To count the number of records that match the selection criteria, in the toolbar, click **Count**. The results appear in the **Query Designer** dialog box. Click **OK**.
7. To save the query, do the following:  
In the toolbar, click **Save**. The **Save Query Dialog** box appears.



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

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

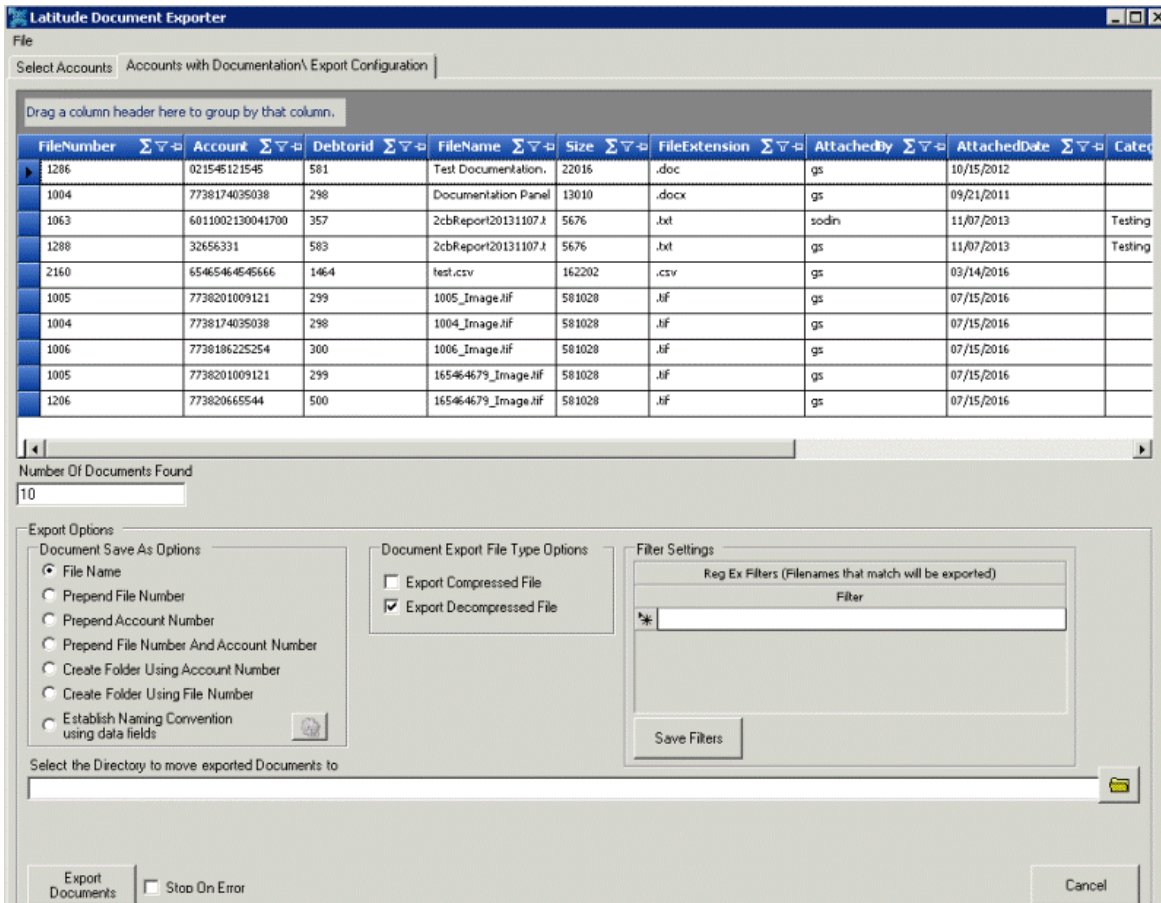
8. Click **Run**. The query results appear on the **Accounts with Documentation\Export Configuration** tab.

## Export Documents

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

### To export documents

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



**Number of Documents Found:** Number of documents to export for the selected accounts.

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

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

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

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

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

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

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

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

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

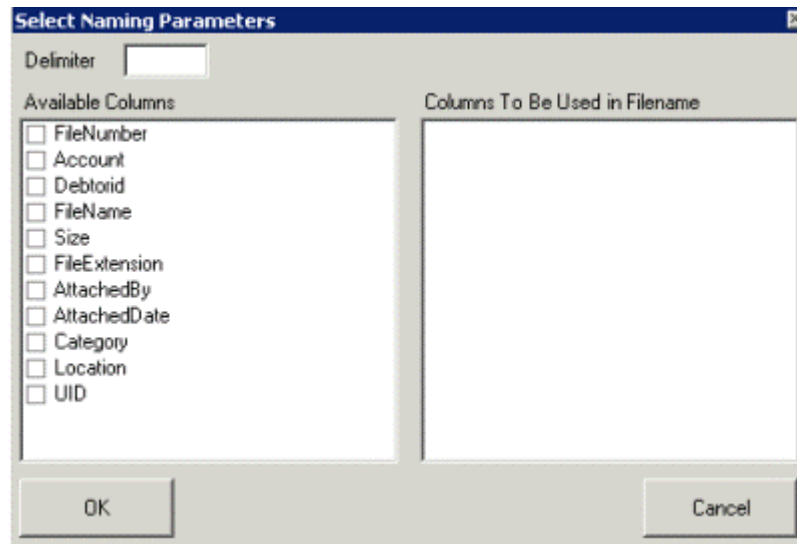
**Filter:** Regular expression to use to limit the documents to export to the ones that match specific file names. You can specify more than one filter.

**Save Filters:** Saves the filters you specified.

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

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

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



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