GENESYS™

Document Attacher

Printable Help

Version 2020 R1

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Abstract

This document is a printable version of Document Attacher help.

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Introduction to Document Attacher

Document Attacher allows you to attach documents to accounts in Latitude. If configured properly, you can import multiple documents to multiple accounts in a single import process. Once you attach documents to accounts, you can view and manage them in the **Documentation** panel in the **Work Form** in Latitude.

Documentation permissions

Document Attacher requires the following permissions to allow you to attach documentation and specify the file storage location:

- Attach Documentation

- Documentation File Storage

For more information about the **Documentation** panel, see Documentation in the *Latitude* documentation. For more information about the documentation permissions, see Documentation Settings in the *Latitude* documentation.

Log on to Document Attacher

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

To log on to Document Attacher

1. Click **Start** > **All Programs** > **Interactive Intelligence** > **Interaction Collector** > **Latitude Document Attacher**. 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 Attacher** window appears.
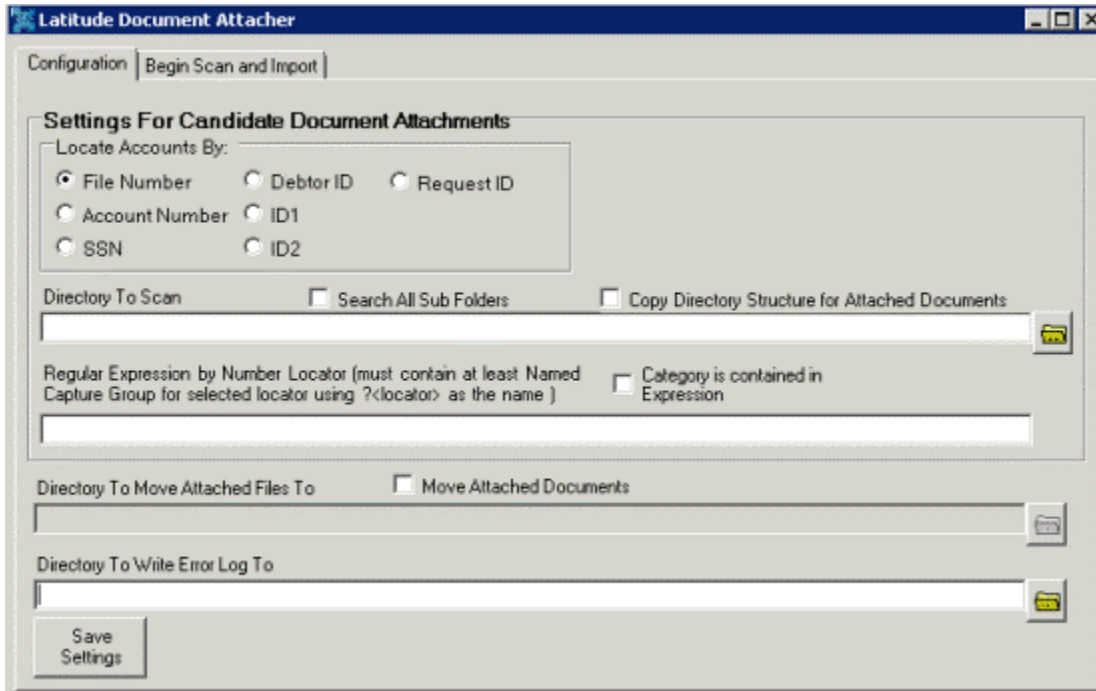
Help Overview

Document Attacher help provides you with information for using Document Attacher. To locate and view a topic, use the table of contents, index, and search features.

To open help

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

> **Tip**: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

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.

   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.

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 the 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.

Configure Document Attacher

Use the **Configuration** tab in the **Latitude Document Attacher** window to configure Document Attacher for importing documents.

To configure Document Attacher

1. In the **Latitude Document Attacher** window, click the **Configuration** tab.
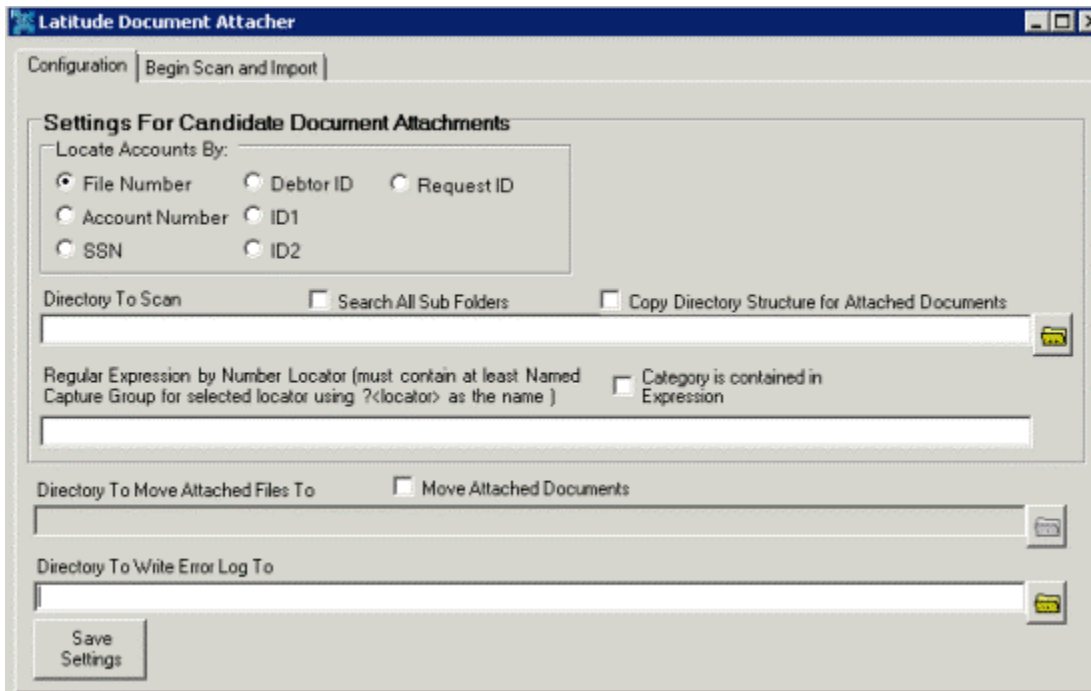
Locate Account By: Method to use to locate an account in Latitude. When naming files, start the file name with the appropriate value following by an underscore. For example, if you want to import a document called "MyImage.jpg" for file number 1005, select the **File Number** locate method and name the file "1005_MyImage.jpg".

You can import files for multiple accounts as long as you name the files according to the method you select and place them in the directory you specify to scan.

Directory To Scan: Directory that contains the files to import.

Search All Sub Folders: If selected, the system searches for files in all subfolders in the specified directory.

Copy Directory Structure for Attached Documents: If selected, the system uses the same directory structure for the attached documents as the one from which it imported the documents.

Regular Expression by Number Locator: Regular expression to use to locate accounts in Latitude to which to attach the files. For example, you have a file named "1005_MyImage.jpg". You select "File Number" as the locate method and specify "^(?<locator>[0-9]+)" as the regular expression. The system uses the expression to extract file number 1005 from the file name and locate the account in Latitude.

Category is contained in Expression: If selected, assigns the document category specified in the regular expression to the file.

Directory To Move Attached Files To: Directory to move files to after attaching them to an account. This box is available when you select the **Move Attached Documents** check box.

Move Attached Documents: If selected, the system moves the files to the specified directory.

Directory to Write Error Log To: Directory where you want the system to save the error log.
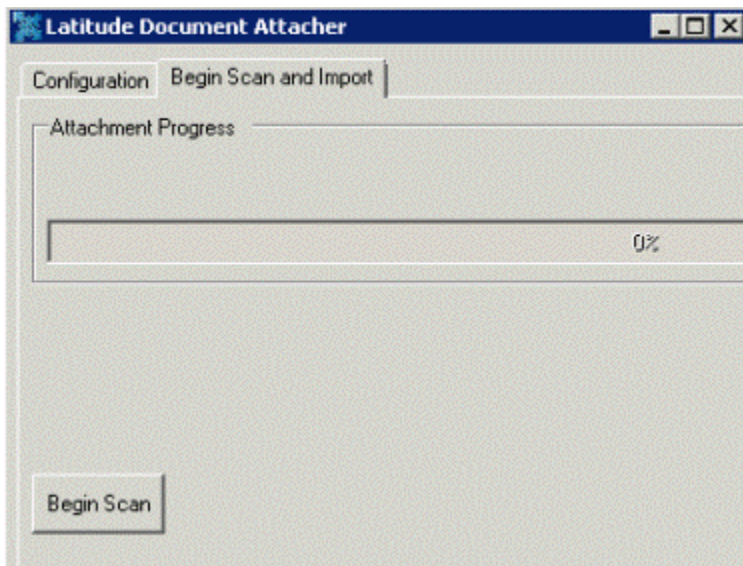
2. Complete the information and then click **Save Settings**.

Import Documents

Use the **Begin Scan and Import** tab in the **Latitude Document Attacher** window to scan the specified directories and import the documents.

To import documents

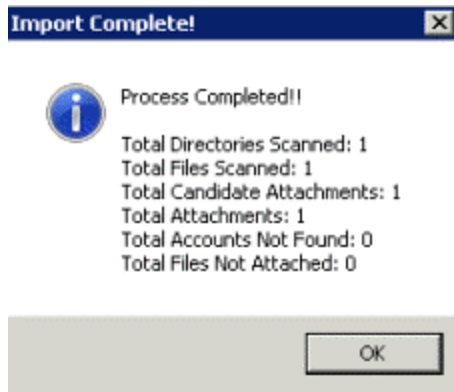1. In the **Latitude Document Attacher** window, click the **Begin Scan and Import** tab.

2. Click **Begin Scan**. The system scans the directory you specified to determine which documents to attach to accounts.
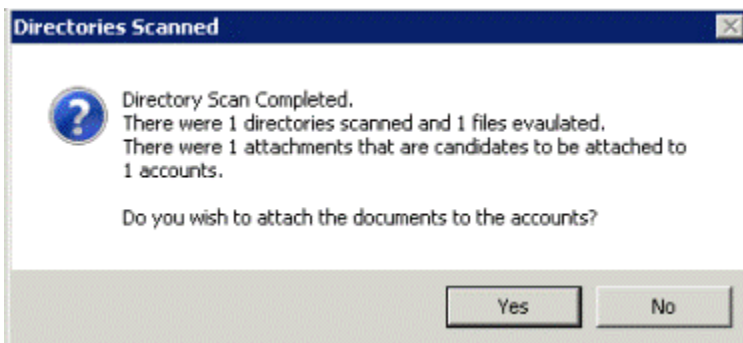
> **Note:** The system includes a message in the error log and doesn't attach documents when:
>
> - The system cannot match the document to an account in Latitude.
>
> - The document uses the wrong file naming convention for the locate method specified. For example, you selected the **File Number** locate method and your file names start with an SSN.

3. Click **Yes**.

Import Complete! ☒

Process Completed!!

Total Directories Scanned: 1
Total Files Scanned: 1
Total Candidate Attachments: 1
Total Attachments: 1
Total Accounts Not Found: 0
Total Files Not Attached: 0

OK

4. Click **OK**.

5. If there are issues during the import, view the error log in the directory you specified.