GENESYS™

Document Exporter

Printable Help

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Abstract

This document is a printable version of Document Exporter help.

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

Table of Contents
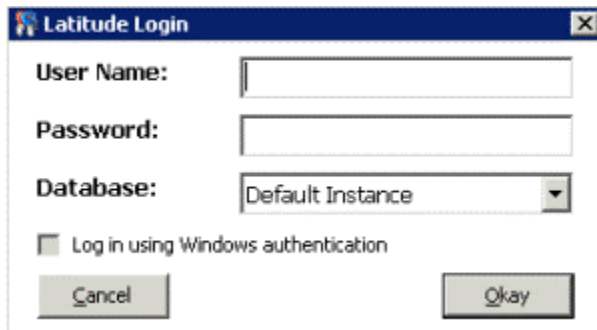
Introduction to Document Exporter

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 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.
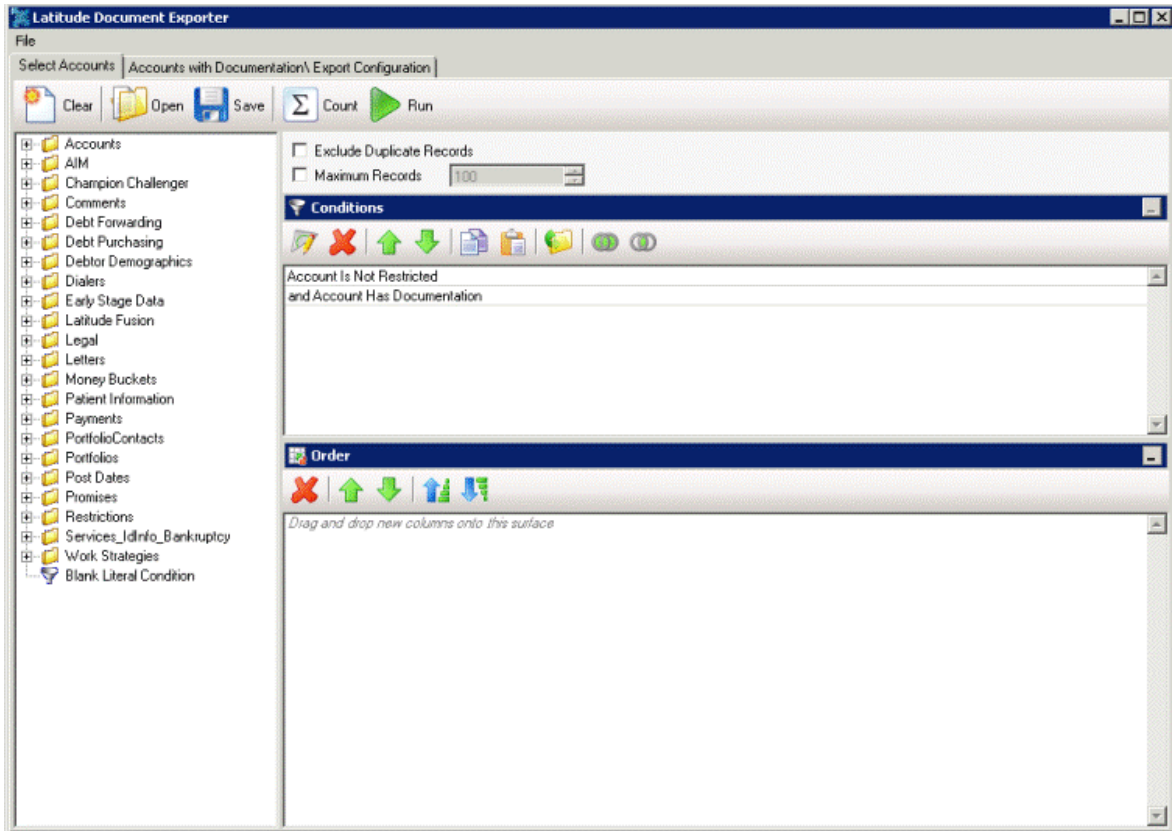

2. In the **User Name** box, type your Latitude user name.

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.

Help Overview

Document Exporter help provides you with information for using Document Exporter. 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 **DocumentExporter.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.

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.
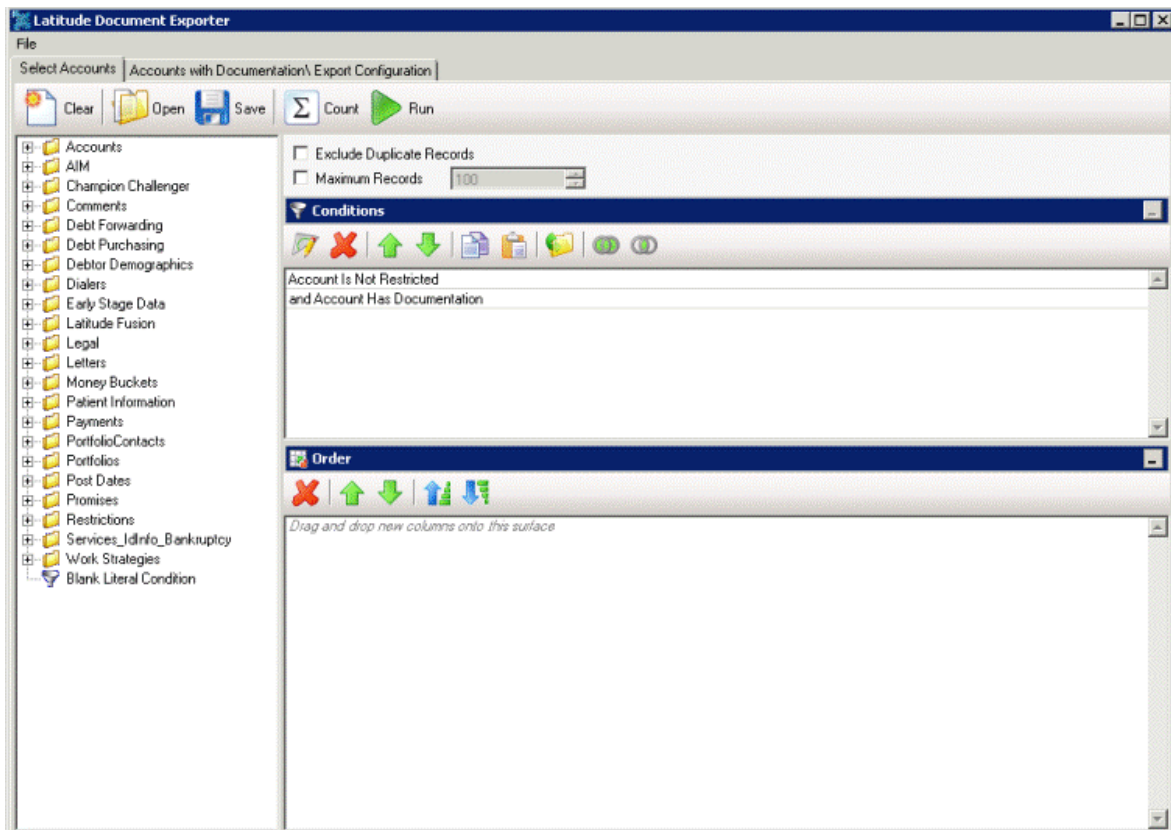
2. To exclude duplicate records from the query results, select **Exclude Duplicate Records**.

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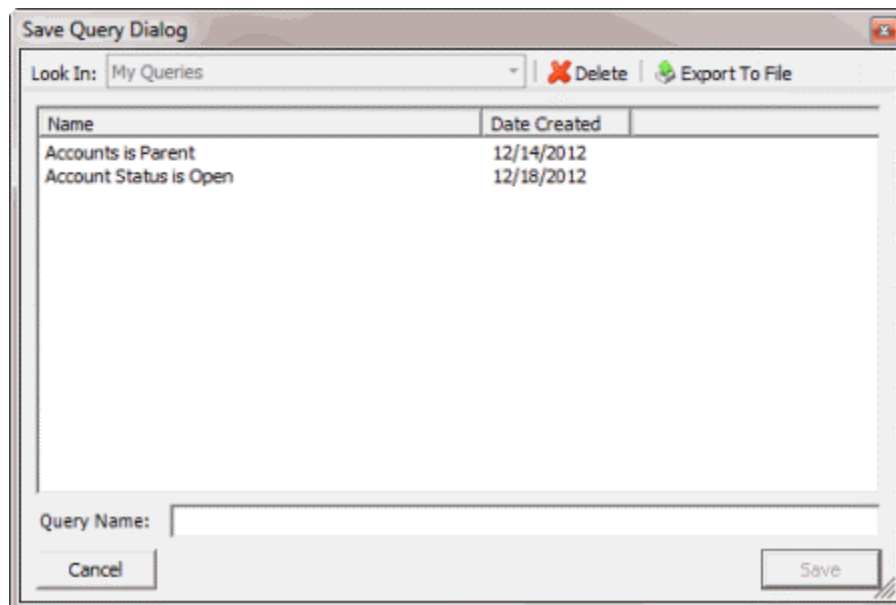
       b.   In the **Query Name** box, type a name for the query and then click **Save**.

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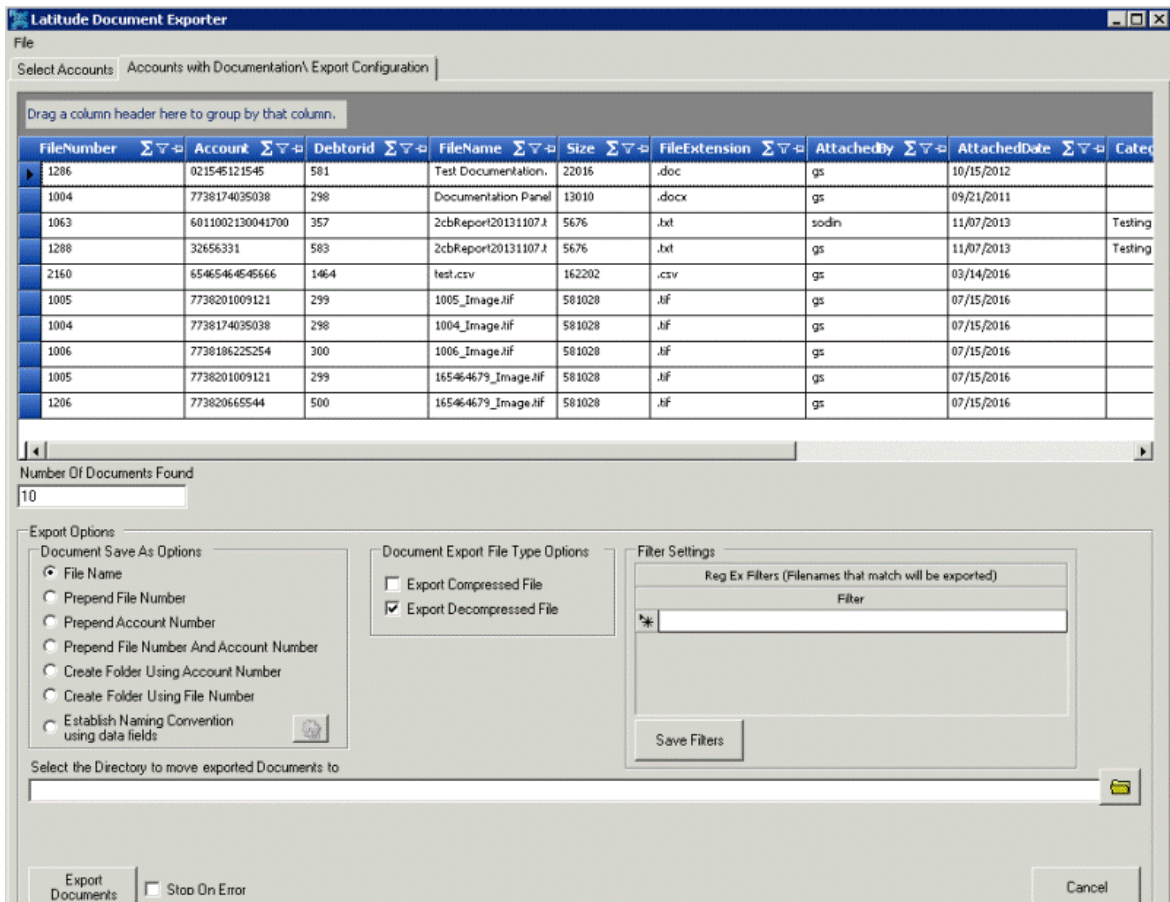
Number of Documents Found: Number of documents to export for the selected accounts.

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.
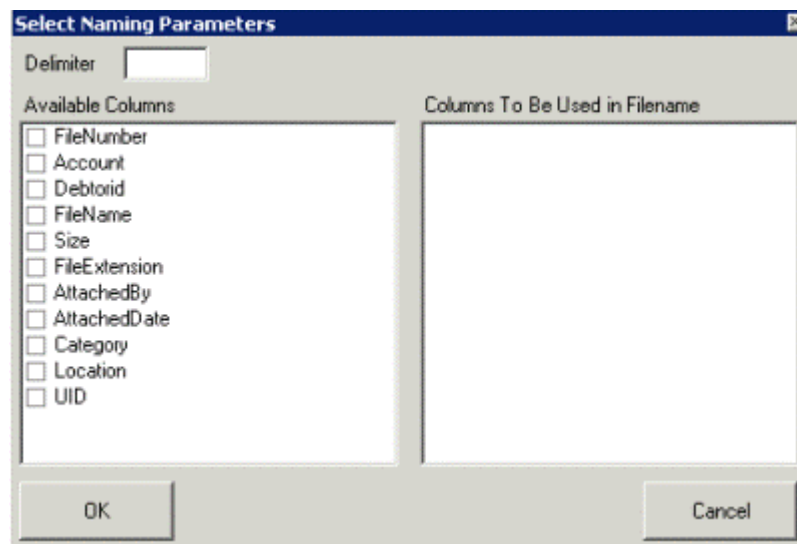
   b. Select the columns to use as the file naming convention and then click **OK**.

3. Complete the remaining information and then click **Export Documents**. The system exports the documents that match the settings you specified.