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SMART User Manual

Export and Import SMART Instructions

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Export and Import SMART Instructions

An exported SMART definition can be used for a number of purposes:

- To create a backup copy of the set of instructions.
- To transfer definitions from a test environment to the real system used by your company.
- To send the output to another location within your company for importing into a different SMART implementation.
- To send the output to Genesys staff for testing or when you are having a problem with the system

SMART export files have an *.upf* extension.

Exporting SMART Definitions

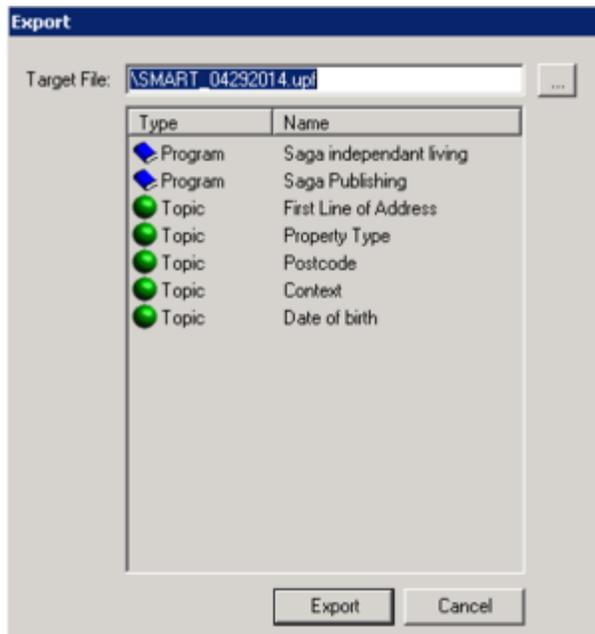
When exporting SMART topic, program and/or category definitions remember the following:

- If you select a folder, all of the items in the folder are selected and exported.
- If you select **All** in the tree list, all of the definitions of the selected type are selected and exported.
- If you do not make a selection, all items in the currently displayed Manager are included in the export file. For example, if the Topic Manager tab is open, but no topics are selected, all of the topic definitions are included in the export file.
- When you export a program, all topics included in the program are exported along with the program. When you export a Parent Category, all of its sub-Categories are included in the export file.
- When exporting a category, its sharing settings are not exported with it. If you import the category at a later time, it will contain the **All** sharing settings. By default, categories are shared with all SpeechMiner users. You can change this by specifying groups, work groups, roles, and/or specific users with whom a category should be shared. Category sharing does not affect which interactions a user can see or play back.

Procedure

1. Verify that the topics, programs and/or categories you want to export are not open or **locked**.
2. Select the topics, programs, categories or folders you want to export.
3. Click **Export** .

The Export list dialog box opens. If you chose to export specific items, they are listed in the dialog box.



4. Click **Browse**  to select the location of the export file.
5. Click **Export**.

The export file is created. When the process is complete, a confirmation message appears.

6. Click **OK** to complete the export process.

Related Topics

[Locking and Unlocking Topics, Programs and Categories](#)
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[Programs](#)
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Importing SMART Definitions

When you import a .upf file, you can select which items to import.

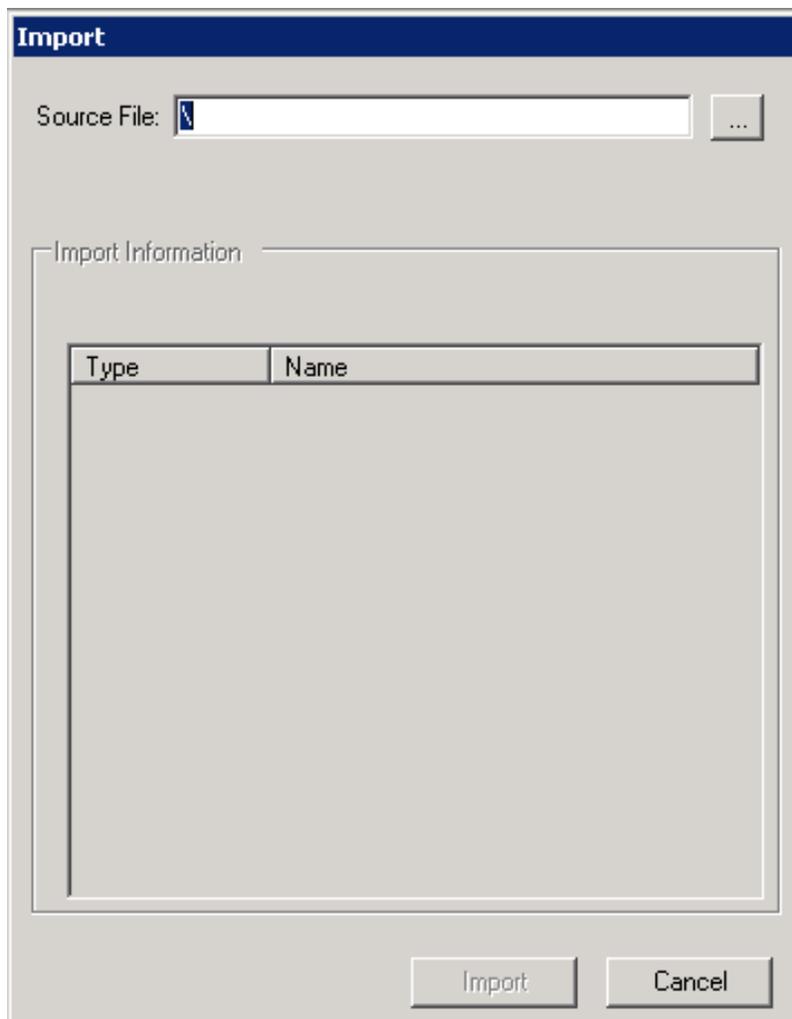
Tip

When you import a Category, its **sharing setting** is normally set to **All**. However, if a Category with the same name already exists in SMART when the import process is initiated, the sharing settings of the existing category are applied.

Procedure

1. Click **Import** .

The Import dialog box opens.



2. Click **Browse**  to select the location of the file you are importing.
3. Select the file and click **OK**.

4. Verify that the items you want to import are selected. If there are items in the list that you do not want to import, clear their check boxes.
5. Click **Import**.

The import process begins. If you are importing items that already exist in SMART, you are prompted to confirm that you want to replace the existing items with the items in the file you are importing. When the process is complete, a confirmation message appears.

6. Click **OK** to complete the export process.

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