CAPSYS
CAPTURE

Queue Monitor Configuration Guide

For 2019 and 2020, 2022 Cloud Editions

Version 2.0

Overview

CAPSYS CAPTURE Queue Monitor is an _Autonomous Windows Service_ that can be configured to take automated actions that normally would be performed manually by a knowledge worker on one (1) or more CAPSYS CAPTURE queues where active cases reside. Queue Monitor is typically installed by default on the CAPSYS CAPTURE ONLINE Application Server automatically during the initial deployment process.

Why Use Queue Monitor?

Example use cases of where Queue Monitor has been proven to be very useful in various customer situations which include but are not limited to:

1) Automating a case completion event that is needed to trigger an automated database look-up. Typically, customers may provide regularly scheduled database uploads to the CAPSYS CAPTURE ONLINE cloud service that are used in the course of daily transactional case work. Upon receipt of the database uploads, automated Case Completion events can be triggered by Queue Monitor to complete the case work out of the process without Knowledge Worker intervention – thus routing the cases to a DB Lookup Event to validate batch or document indexes.

2) Cases need to be automatically routed to:
    a. Another queue for further processing, OR;
    b. Another CAPSYS WorkBOT for some other automation event such as OCR, Classification, PDF processing, etc., OR;
    c. A specific Knowledge Worker.

3) A time or date value has been satisfied.

To summarize, the CAPSYS CAPTURE Queue Monitor is typically used in a manner that can take any of the following actions in an automated fashion by:

    a. Setting a CAPSYS CAPTURE Case Status;
    b. Routing the case to a particular CAPSYS CAPTURE Queue or user;
    c. Completing the case to follow the next step in a predefine Batch Process or Document Type workflow process.

Configuration

To configure CAPSYS CAPTURE Queue Monitor, select the configuration setup from the CAPSYS CAPTURE Suite program group as noted below:
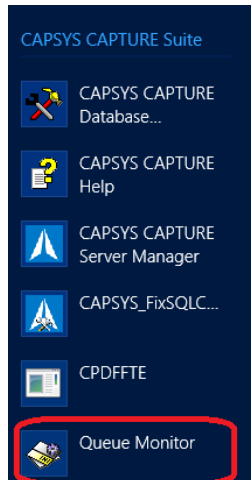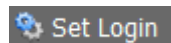

Upon the successful launch of Queue Monitor, the program will return the following configuration and status screen:
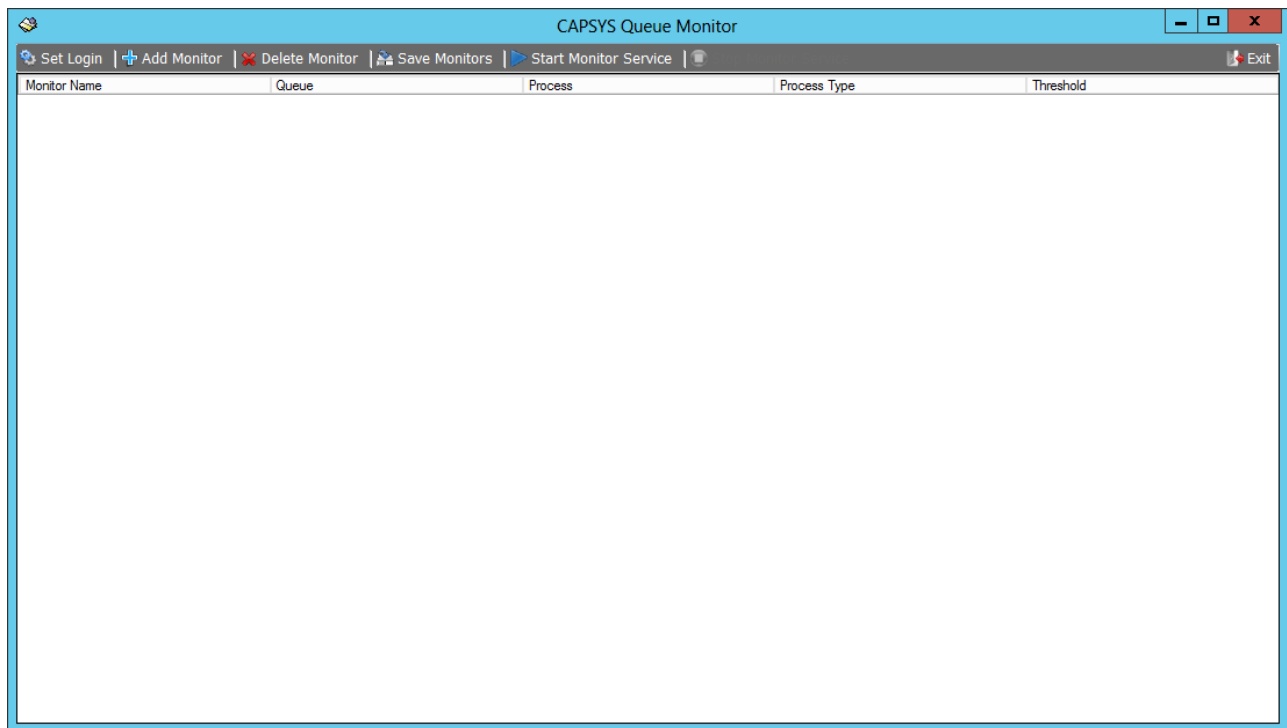
There are several buttons at the top of CAPSYS Queue Monitor that will allow you to configure the Queue Monitor Service:
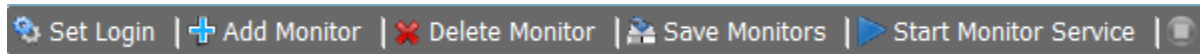
- Set Login
- Add Monitor
- Delete Monitor
- Save Monitors
- Start Monitor Service
- Stop Monitor Service

The following Queue Monitor **Login Form** will display. The credentials requested here are the similar as one used to login into the CAPSYS CAPTURE Web Client which requires access to the necessary Batch Profiles/Document Types and associated queues.

We strongly recommend you define a **dedicated user login** so you may easily track automation events completed by Queue Monitor in the Audit Log or by the optional CAPSYS CAPTURE ONLINE Dashboard offering.

> *Notes:* Queue Monitor consumes a concurrent user license from your available license pool. Also, <u>DO NOT</u> use an actual end user's Web Client login otherwise you will run into duplicate login errors either experienced by the end user himself/herself or by the Queue Monitor event.

There are two (2) fundamental components of the Queue Monitor Service that must be taken into consideration and configured appropriately which are as follows:
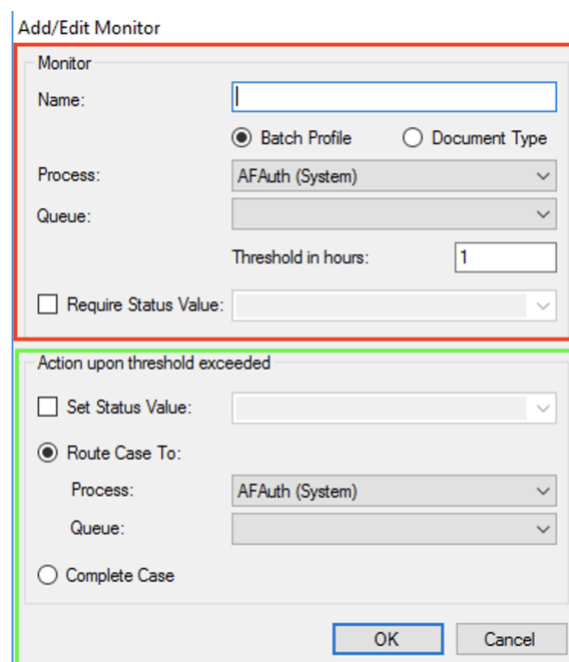
1) ***Add or Editing*** a Monitor Event AND;
2) Defining an ***Action*** you desire to take place

Adding or Editing a Monitor Event

➕ Add Monitor
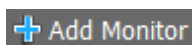
There are two aspects to successfully configuring a Monitoring Event in Queue Monitor. The first half of the configuration dialog - **noted by the RED outlined box** indicates where you define which Batch Process or Doctype Profile, Queue and a Time Threshold measured in increments of 1 hour and/or whether a Status Value is required or determined to have been satisfied.

The second aspect of a successful configuration process – **noted in the Green outlined box** requires defining what action you desire Queue Monitor Autonomous Automation to take place.

A **Monitor Event** can be configured to keep an active watch on a process (Batch Profile or Document Type) work queue. We will define three (5) required minimum configuration parameters which are described as follows:
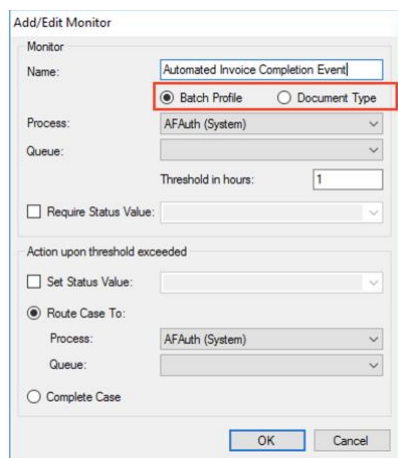
1) *Provide a descriptive name* for the Monitoring activity in the **Name Field;**
2) *Choose* the appropriate ***Batch Profile* or *Document Type radio button*;**
3) *Choose* the desired **Process Name** from the drop-down list;
4) *Choose* your appropriate **Queue Name** to be monitored;
5) *Set your desired Threshold Value* in which the automated Monitoring Event when upon satisfied by the specified time interval, **will be trigger**.

To begin:

- **Name** your Queue Monitoring Configuration in the dialog box**:**

- **Select the appropriate Radio Button**, either *Batch Profile or Document*

- **Choose** your appropriate *Process Name* from the provided list:

- **Choose** your appropriate *Queue name*:

- **Set your Threshold in hours:** the amount of time the case has been in the selected queue *before* any Action will take place.

    o **Note:** Minimum threshold and default value is 1 hour.

- **Required Status Value:** (optional)

The first half your Monitoring Event configuration process has now been successfully completed. On the following pages, we will illustrate how to configure the second half of your Monitoring Event configuration process called, "Action upon a Threshold".
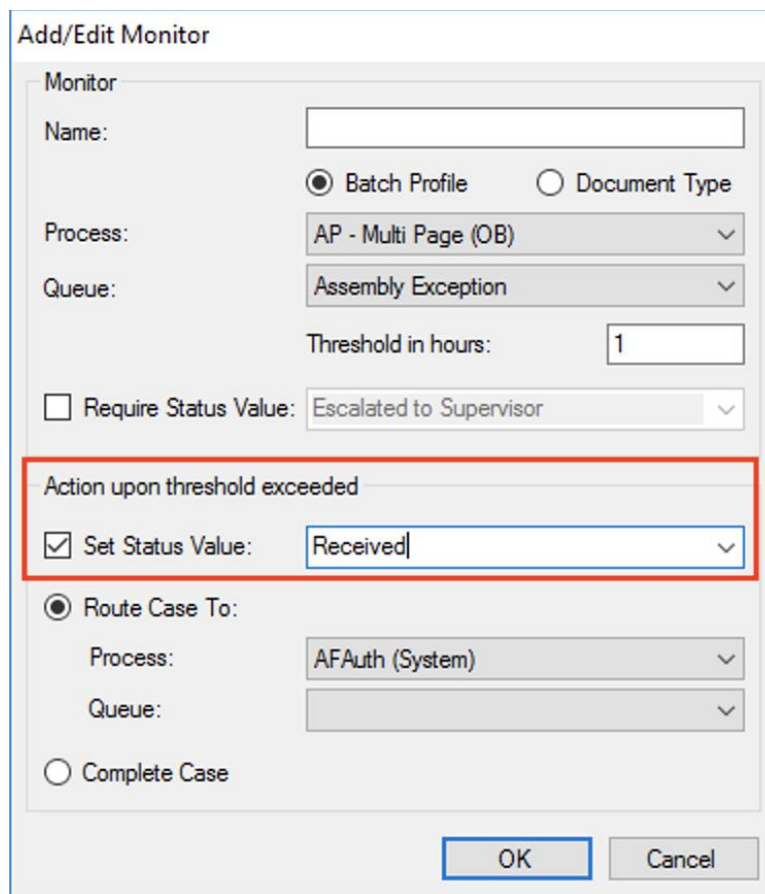
Action upon a Threshold

Next, we will configure the **Action upon a Threshold** options. There are three possible outcomes upon a Threshold having been exceeded:

1. Set a Status Value
2. Route a Case
3. Complete a Case

Action upon threshold exceeded

- Set Status Value: Check this box and pick from a list of Global Status Values that may be used in the course of your workflow process by either users, events or external processes to trigger your Monitor Event.

- Route Case To: (if not wanting to Complete the case to the next process event)

  ➢ Process: Batch Profile or Document Type
  ➢ Queue: Choose desired queue within the process just selected

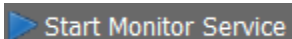 ➢ Complete Case: completes case in current process.

Deleting a Monitor Event
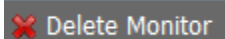
This will initiate a delete of the currently selected monitor. A confirmation form will appear requesting if this is the Delete is desired.
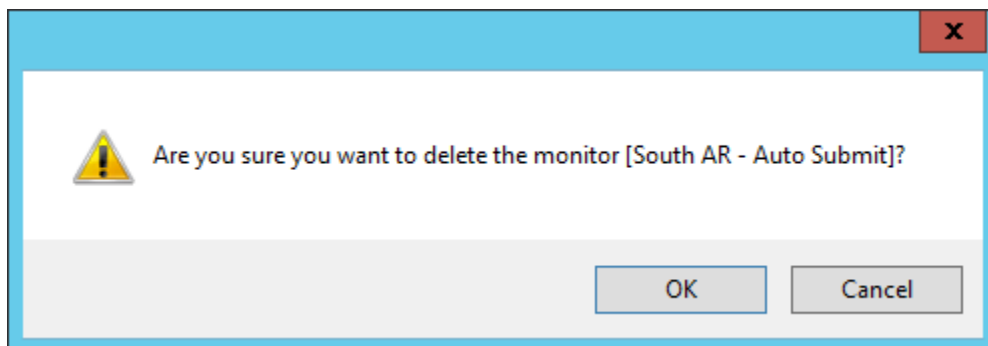
Starting a Monitor Service

By choosing the 'Start Monitor Service' command it will start the 'CAPSYS Queue Monitor' service. It is advised that if this is the first time the 'CAPSYS Queue Monitor' service has been configured, then the credentials for the service itself should be set to match those of the 'CAPSYS CAPTURE Server' service.
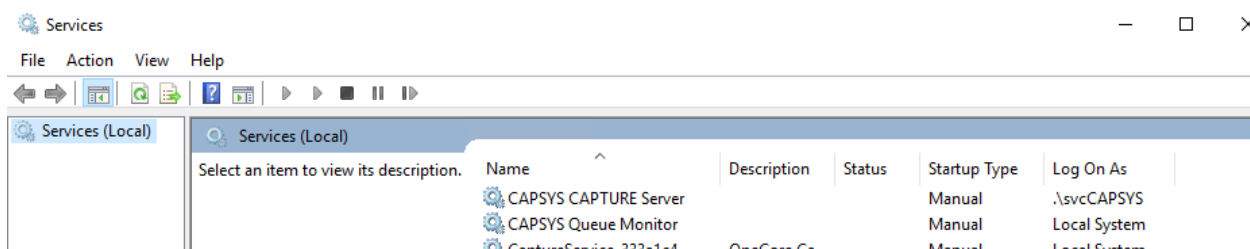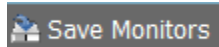

Note: Another configuration tip is to set the 'CAPSYS Queue Monitor' service Startup Type to Automatic, thereby enabling it to startup upon system restart.

This is an example of what CAPSYS Queue Monitor would look like when several monitors have been properly configured.

Saving Monitor Event(s) Configuration Parameters

After defining new monitors or modifying existing monitors the 'Save Monitors' must be chosen to save all updates to the monitor list. The definitions for all the monitors are stored in an XML file found where the QXMonitor application is installed, \Program Files (x86)\CAPSYS CAPTURE Suite\CAPSYS CAPTURE\QXMonitor\qmonitor.xml

```
<?xml version="1.0" encoding="utf-8"?>
<QMonitor>
  <Login> abcdefghijklmonpqrstuvwkyz =</Login>
  <Pwd>abcdefghijklmonpqrstuvwkyz=</Pwd>
  <Interval>0</Interval>
  <Monitors>
    <Monitor SearchByStatusValue="" SearchByStatus="0" ProcessLocked="0" Threshold="4"
QueueID="3971" Queue="South - AR Auto Submit Invoice #" ProcessID="444"
Process="South_AR_Doctype" ProcessType="1" Name="South AR - Auto Submit">
      <Action CompleteCase="1" DestQueueName="" DestQueueID="0" DestProcessID="0"
Status="" />
    </Monitor>
    <Monitor SearchByStatusValue="" SearchByStatus="0" ProcessLocked="0" Threshold="4"
QueueID="3965" Queue="South - AR PDF/Full Text Exceptions" ProcessID="444"
Process="South_AR_Doctype" ProcessType="1" Name="South AR PDF/FullText">
      <Action CompleteCase="1" DestQueueName="" DestQueueID="0" DestProcessID="0"
Status="" />
```

```
    </Monitor>
  </Monitors>
</QMonitor>
```

End of Queue Monitor Configuration Guide