Interaction Process Automation Monitor

Printed Help

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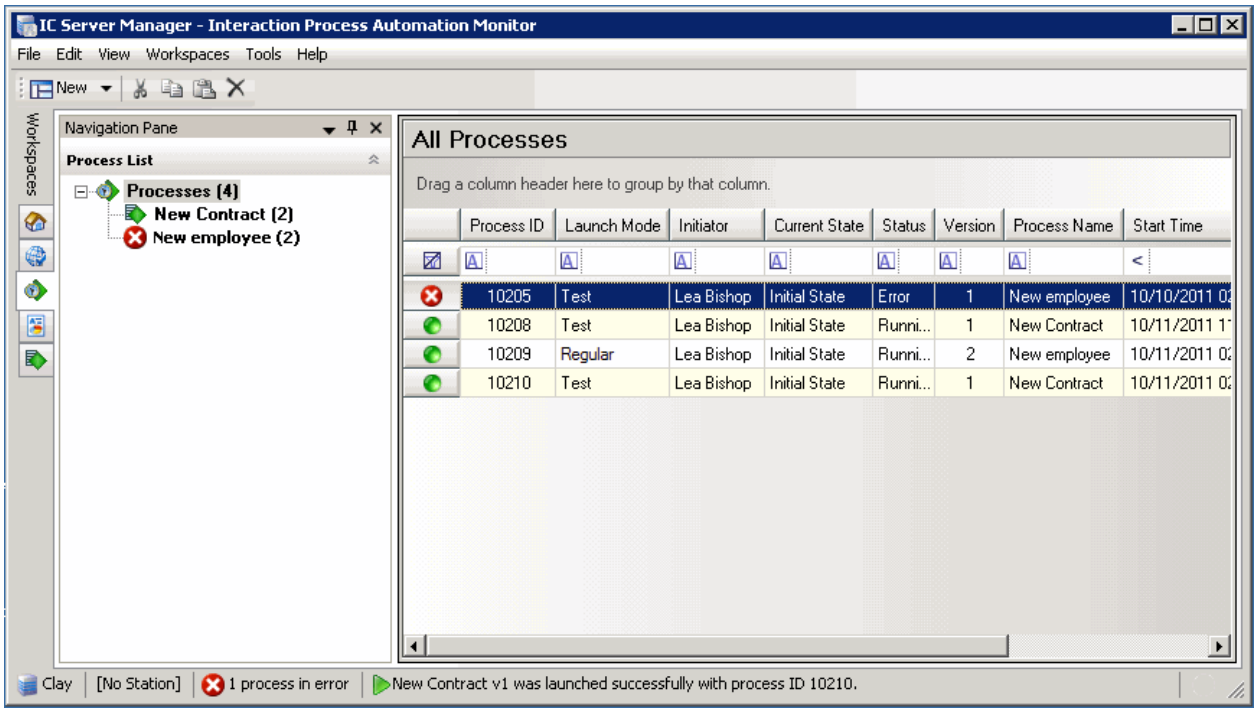
Process Monitor

Introduction

The Interaction Process Automation Monitor (IPA Monitor), a module in IC Business Manager and IC Server Manager, is a management tool for monitoring, tracking, and interacting with running process instances.



All process instances that are currently running appear in the process view workspace. Move your mouse pointer over the image above or click on an area to view information about the IPA Monitor.

You can use IPA Monitor to do the following:

- View basic information and details for all instances of the processes for which you have view rights.
- Create a filtered view of the processes you're interested in. You can filter by a specific process, by the process owner, the length of time an instance has been running, the current state, the originator of the process instance, etc.
- Cancel a process instance for which you have modify rights.
- Display detailed information for a process, including schema variables, tasks, etc.
- Retry an action that previously resulted in an error.
- Restart a process that previously resulted in an error.

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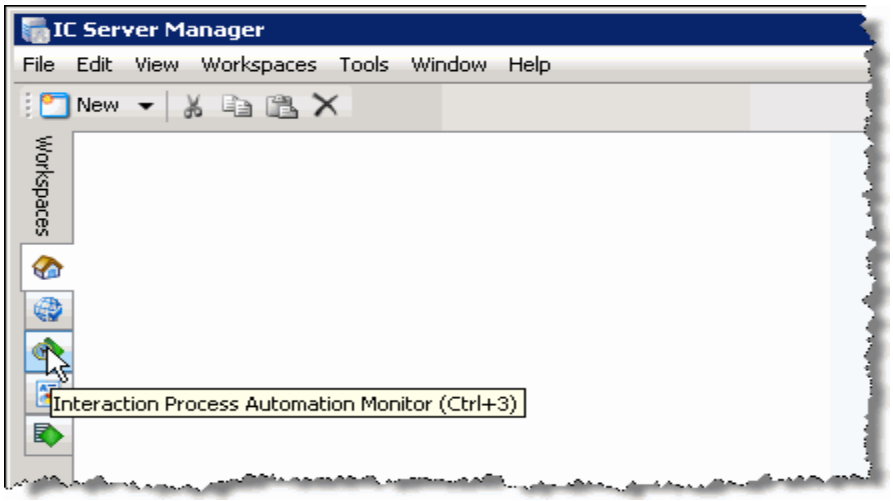
Starting IPA Monitor

To start the IPA Monitor:

In either IC Business Manager or IC Server Manager, do one of the following:

- Click the **Interaction Process Automation Monitor** tab along the left edge of the window.



- On the **Workspaces** menu, click **Interaction Process Automation Monitor**.

IPA Monitor appears in the workspace.

About Process Automation Server

The Process Automation Server (PAS) runs processes that were created in the Interaction Process Automation Designer. PAS sends information about workflows to IPA Monitor.

There are two versions of Process Automation Server, v1 and v2. With PAS v2, IPA Monitor has some changes:

- IPA Monitor subscribes to no processes by default, instead of all processes.
- The IPA Monitor user interface includes filters for subscribing to processes.

See also:

Subscribing to Processes

About the Process View

Statuses

IPA Monitor displays a status icon and status text for each process.

The following is a list of statuses:

Icon	Status	Description

	Running	The process is running without error.
	Queued	Process Automation Server queued the process to launch when other processes exit and capacity becomes available.
	Error	An error occurred while the process was running.
	Cancelling	The processed is being cancelled. This status icon appears when you cancel a process from IPA Monitor. It is followed by the Cancelled icon. This status icon does not appear when you are watching a process that was cancelled by

		someone else.
	Cancelled	The process was cancelled and will be removed from IPA Monitor momentarily.
	Completed	The process completed successfully and will be removed from IPA Monitor momentarily.

Modifying the Process View

You can do any of the following to modify the way that IPA Monitor displays the list of process instances:

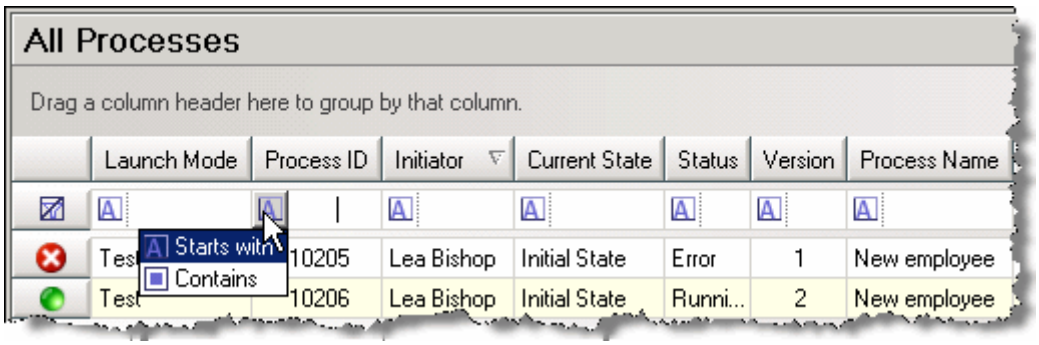
- Modify the columns displayed in the Process View
- Change the sort order of a column
- Select a column to sort by
- Group processes in separate lists

Filtering the Process View

You can enter text or values below the column headings to filter the process data that appears. For example, you can filter the view to show all instances of a particular process, all processes in a particular state, all processes originated by a particular user, etc.

To filter the process view:

1. Click the icon in the area below the column heading to display the possible filters for that column. The icon indicates the type of data in that column.



2. The following types of filters are available:

Icon	Filter Name	Description
	Contains	Allows you to specify a string and then display only the processes that contain that string in that column.
	Starts with	Allows you to specify a string and then display only the processes that begin with that string in that column.
	Less than	Allows you to display only the processes with a value less than the value or date you specify. In a date/time column, this filter appears with a calendar control.
	Greater than	Allows you to display only the processes with a value greater than the value or date you specify. In a date/time column, this filter appears with a calendar control.

3. Click the filter you want to use, and then specify the related value. The data is filtered as you type.

Related Topics:

Clearing Filters in the Process View

Clearing Filters in the Process View

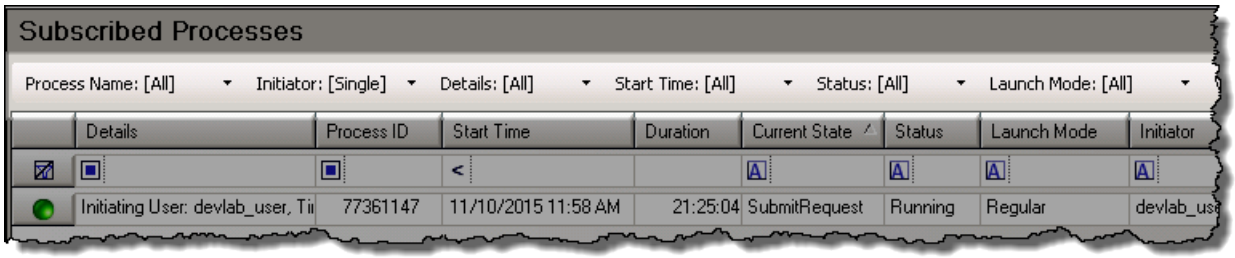
To clear any filters that you previously created, click at the left end of the filter row.

See also:

Filtering the Process View

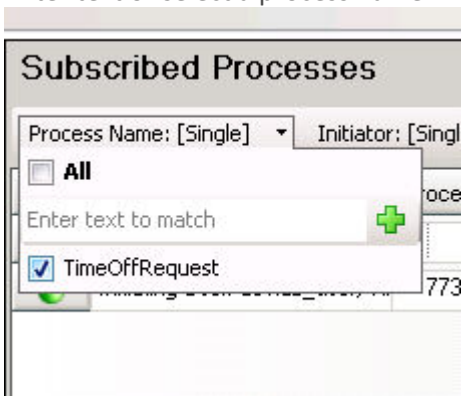
Subscribing to Processes

If your environment uses Process Automation Server Version 2, you can use filters to set which process data is delivered to Process Automation Monitor. Process Automation Monitor performance may be degraded if the server delivers information about all running processes to the application.



To add filters to the process subscription:

1. Click on the name of the filter you want to add.
2. Enter text or select a process name:



3. Repeat steps 1 and 2 for additional criteria you want to set.
4. Click **Apply**.

Process Automation Server Version 2 will now deliver only information about processes that fit the selected filters.

Clearing Subscription Filters

To reset all subscription filters to [all], click **Clear** and then **Apply**.

Reverting Filter Changes

While editing filter settings, you can revert subscription filters to their previous settings by clicking **Revert**.

> Note: you cannot revert to previous settings after the changes have been applied. Reverting only works during editing.

See also:

About Process Automation Server

Working with Processes

Viewing Process Details

In IPA Monitor, you can view the following detail information for a process instance:

- Name of the initiating user, along with the date and time the process instance was launched.

  > **Note:** If a user sets the value of a time variable in the Webviewer, then Process Automation Monitor displays the time as Greenwich Mean Time (GMT), not as the user's local time. GMT is the worldwide standard time.

- ID and current state of the process.
- Launch mode (regular or test).
- Process actions.
- The process variables (sorted alphabetically by label).
- Associated interactions.
- Notes added to the process.

To view the details for a process instance:

1. Right-click the process in the IPA Monitor workspace, and then click **Process Details** in the shortcut menu.

   The Process Details dialog box appears. If you selected multiple processes, one dialog opens for each process.

2. Click the **Actions**, **Process Variables**, or **Associated Interactions** tab to view the related information, or click the **Notes** tab to view or add notes about the process instance.
3. Click **Close** to return to the **IPA Monitor** view in IC Business Manager or IC Server Manager.

Tabs

The **Process Details** dialog box contains these tabs:

Actions	Displays the status of the individual tasks within the process.
Process Variables	Displays the data variables for the process instance.
Notes	Displays any notes added for the process instance. See Adding Notes to a Process Instance.
Associated Interactions	View the interactions (calls, chats, ACD-routed email messages, and so on), that are associated with the process instance. Or, remove a process association (requires the Manage Process right).

Cancel, Retry, or Refresh a Process

You can cancel or retry a process if you have the Manage Process right.

Cancel Process	Click **Cancel Process** to cancel a currently running process. **Note:** After a process is canceled, its status changes to canceled and the **Actions** and **Process Variables** tabs no longer appear.
Retry Process (available when one or more actions is in error and depends on user account licensing and access permissions)	Click **Retry Process** to restart a process that stopped due to an error. **Note:** The **Retry Process** button attempts to retry all process actions currently indicated as being in an error state and does not actually restart the running process from the beginning. This feature is designed to assist with troubleshooting and error resolution during execution of a particular process instance.
Refresh (available only	Click **Refresh** to update the information displayed on the **Notes** and **Associated**

after a process is complete)	**Interactions** tabs and include the most recent notes or associated interactions. **Note:** New information does not normally appear immediately on these tabs. Typically, if you edit notes or associated interactions, you are not notified that this information has been successfully updated because it might not happen immediately. The Process Details dialog box can attempt to auto-refresh the information displayed if you edit notes or associated interactions.

Adding Notes to a Process Instance

You can add notes to an instance of a process when it appears in IPA Monitor.

To add a note to a process:

1. Double-click the process instance in IPA Monitor to display the details for the process.
2. Click the **Notes** tab.
3. Type a note at the bottom of the tab, and then click **Add Note**.

The note appears in the middle section of the dialog, along with the user ID, date, and time.

Retrying a Process

If a process cannot complete due to an error, the error status icon appears in IPA Monitor.

To retry the process:

1. Select the process.

> **Note**: You can select multiple processes by holding down the CTRL key and clicking each process.

2. Do one of the following:

- Right-click the selected process or processes, and then from the shortcut menu, choose Retry Process.
- Click a process to display the process details, and then click Retry on the Process Details dialog box.
- The Retry Pro**cess** dialog appears, asking if you want to retry the selected processes.

3. Click **OK** to retry the process.

Retrying an Action with an Error

If an action cannot be completed due to an error, you can fix the error and then restart the action.

To retry an action:

1. Display the process details.
2. Click the **Actions** tab.
3. Select the action with the error, and then click **Retry**.
4. Click **Close** to return to IPA Monitor.

Canceling a Process

You can cancel an instance of a process, as long as you have Modify rights for that process.

To cancel a process instance:

1. Do one of the following:

- Right-click the process instance in IPA Monitor, and then choose **Cancel Process** from the shortcut menu.
- Double-click the process instance to display the details for the process, and then click **Cancel Process**.

2. In the **Cancel Process** dialog boxNo , specify the reason for cancelling the process.

> **Note**: Process Automation Monitor does not require a reason when you cancel a test process.

3. Click **Submit**.

   The status icon changes to , and then changes to before disappearing from IPA Monitor.