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OPEX Insight™ User Manual

5067920UM-EN **Revision 25-01** **Original Instructions**

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Document History

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20-01	Aug 20, 2020	Initial release
25-01	March 11, 2025	• Updated all previous chapters. • Merged the **Scanner Stats Module** chapter with the **Machine Stats Module** chapter.

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OPEX Insight™

User Manual

1.1. Overview

OPEX® Insight™ is a Windows-based software productivity suite that provides the ability to monitor and analyze progress on OPEX mail processing machines in mail room and scanning operations. It provides real-time statistics as well as performance statistics previously saved on a server.

OPEX Insight consists of three modules that are critical to operating at peak performance:

- Status
- Scanner Stats
- ONS+ Machine Stats

OPEX Insight provides you with the ability to:

- Monitor machine productivity.
- Organize machine, job and operator statistical data.
- Generate, view, export and print reports.
- Maintain jobs and operators for REDs (Rapid Extraction Desks).

With the introduction of OPEX Insight, users have improved capability:

- Statistics files from the OPEX machines are converted and stored in a database for faster report retrieval.
- Statistical information from batches created by OPEX scanning equipment is available for reporting.
- Updated user interface provides faster report criteria selection.
- Dynamic grouping and filtering of criteria provides improved report analysis.

1.2. Launching the Dashboard

To launch Insight Dashboard:

1. Double-click on its shortcut icon (Figure 1-1).

Figure 1-1: Insight Dashboard Shortcut Icon

2. Login: Enter username and password.

If desired, check **`Always connect as this user`** to automatically log in when launching the Dashboard (Figure 1-2).

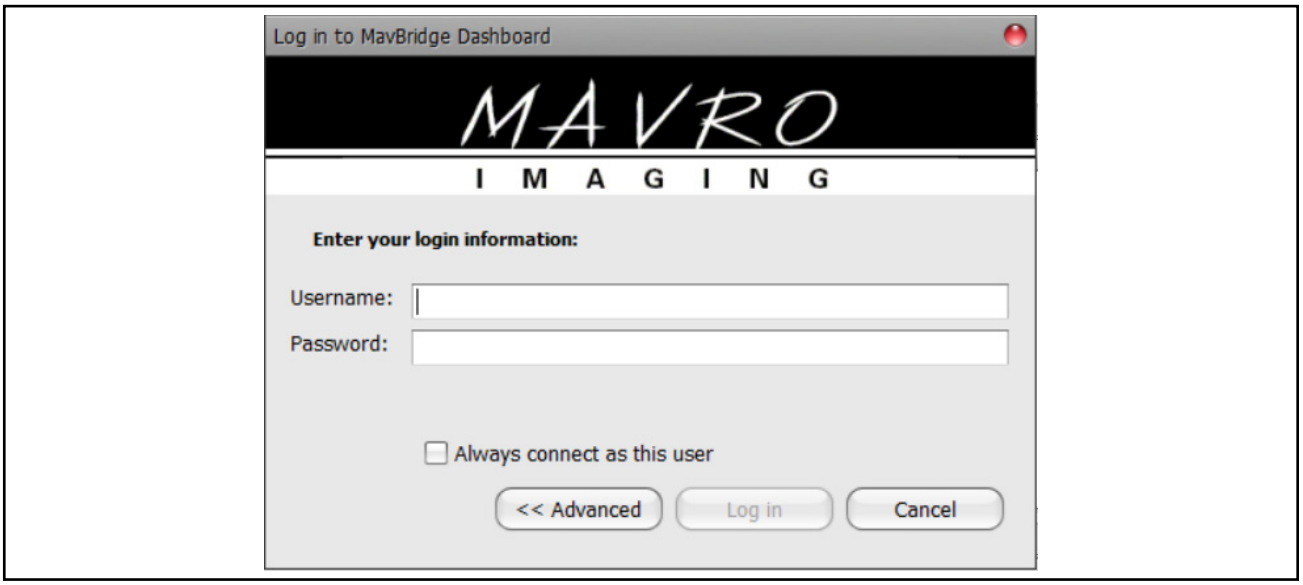

Figure 1-2: Authentication Required Window

Note: *By default, the initial username/password is* **`admin`**.

1.3. Insight Dashboard Overview

The Insight Dashboard display is divided into the following sections (Figure 1-3):

1. Menu Bar
2. Toolbar
3. Module display
4. Status bar

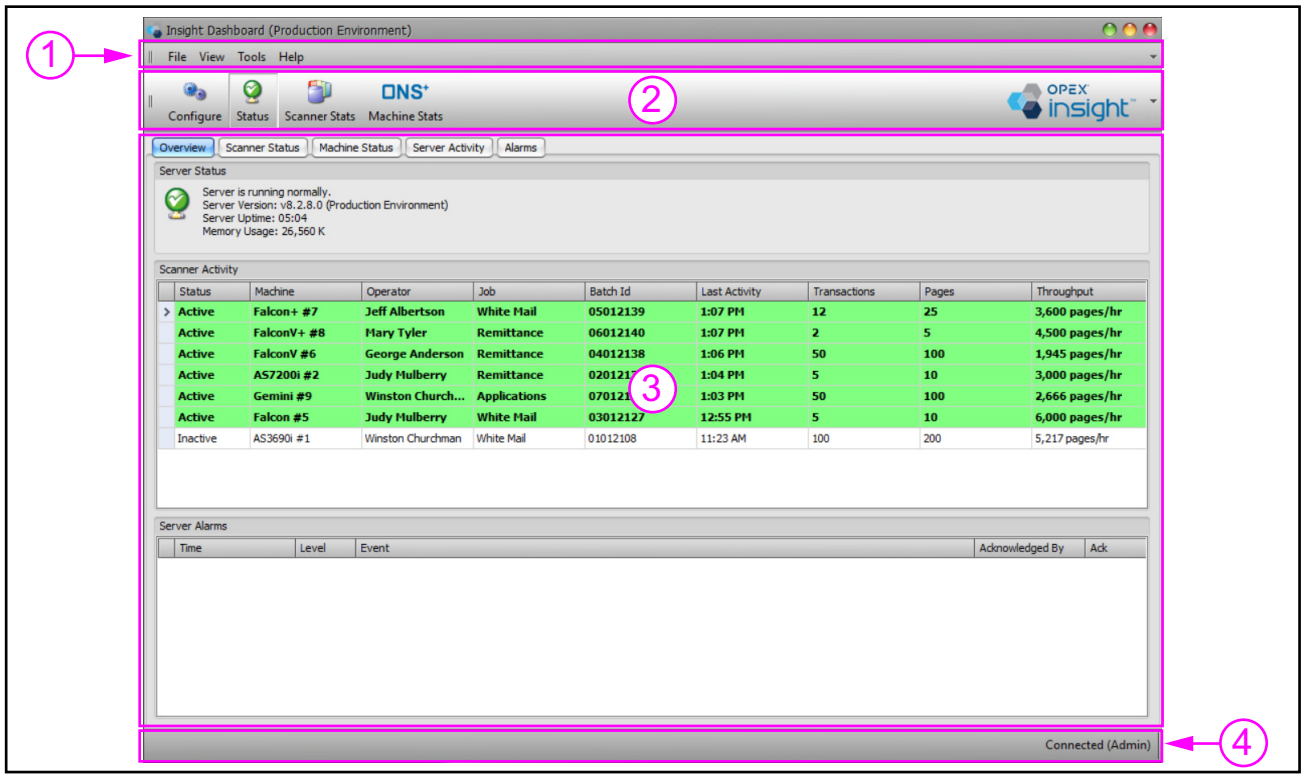

Figure 1-3: Insight Dashboard display

1.4. Toolbar Buttons

The toolbar contains the following buttons for the Insight Dashboard modules (Figure 1-4):

1. **Configure Module:** Used to configure the network and Insight settings.
2. **Status Module:** Provides a quick overview of the machine operation status and provides alerts of detected problems, based on log information.
3. **Scanner Stats Module:** Provides detailed performance reports of operators and jobs for each machine based on batch log information.
4. **ONS+ Machine Stats Module:** Collects detailed machine statistics and provides machine performance reports.

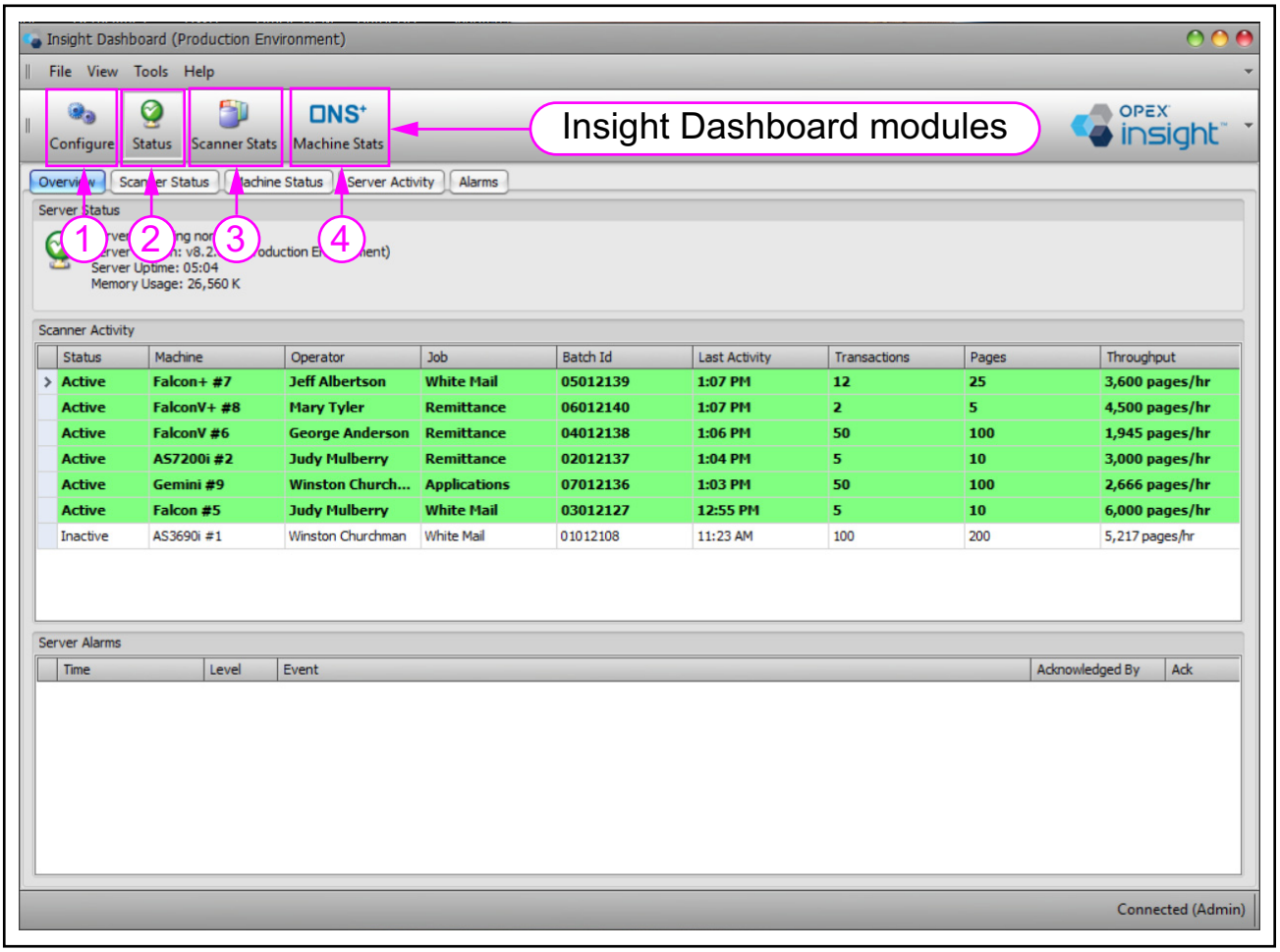

Figure 1-4: Insight Module Buttons

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2.1. Overview

The Dashboard **Configure** module allows OPEX technicians, system administrators, and supervisors to configure multiple groups of settings from tabs (buttons) located near the top of the display (Figure 2-1):

1. **Connection Settings:** Used (in initial setup) to connect the Insight Dashboard to the Mavbridge Core Service and to configure login settings.
2. **Workflow Steps:** Used to schedule the automatic export of statistics data into a share folder. Used in initial setup or for a change in the local area network (LAN).
3. **Machine Statistics:** Used (in initial setup) to define the path to the ONS Machine Data folder, where the statistics data is stored.
4. **Backup Configuration:** Used to perform a quick backup of some of your system's configuration settings, statistics, and logs.
5. **User Configuration:** Used to configure users, groups, policies and Active Directory settings.
6. **System Logs:** Used to display your system's Access Log and Change Log.

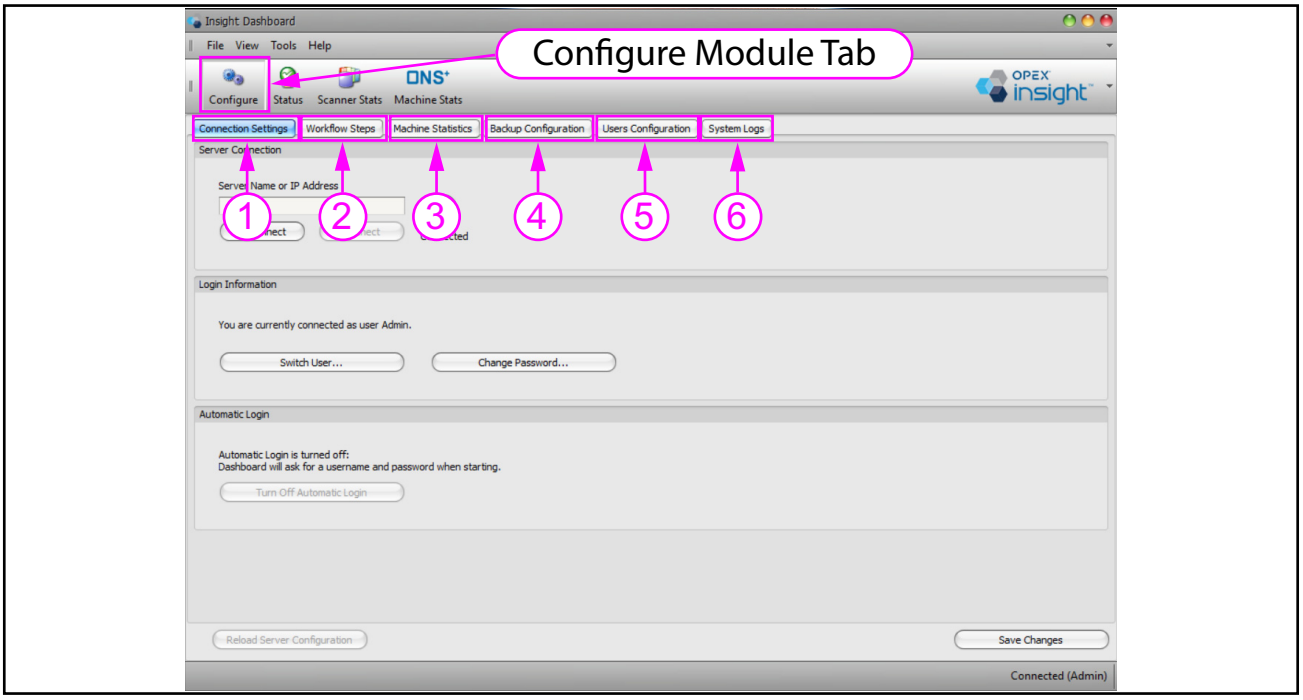

Figure 2-1: Configure module tabs

Note: *Although some of the settings in the* ***Configure*** *module are normally set by system administrators and supervisors, many should only be changed by OPEX technicians. Please restrict the changes you attempt to make in the Configure module to those that are expressly pointed out in this document as administrator and supervisor level tasks.*

2.2. Connection Settings Tab

1. Click on **Configure** (Figure 2-2).
2. Click on the **Connection Settings** tab. The **Connection Settings** area is displayed.

The **Connection Settings** area is divided into three areas (Figure 2-2):

- **Server Connection**
- **Login Information**
- **Automatic Login**

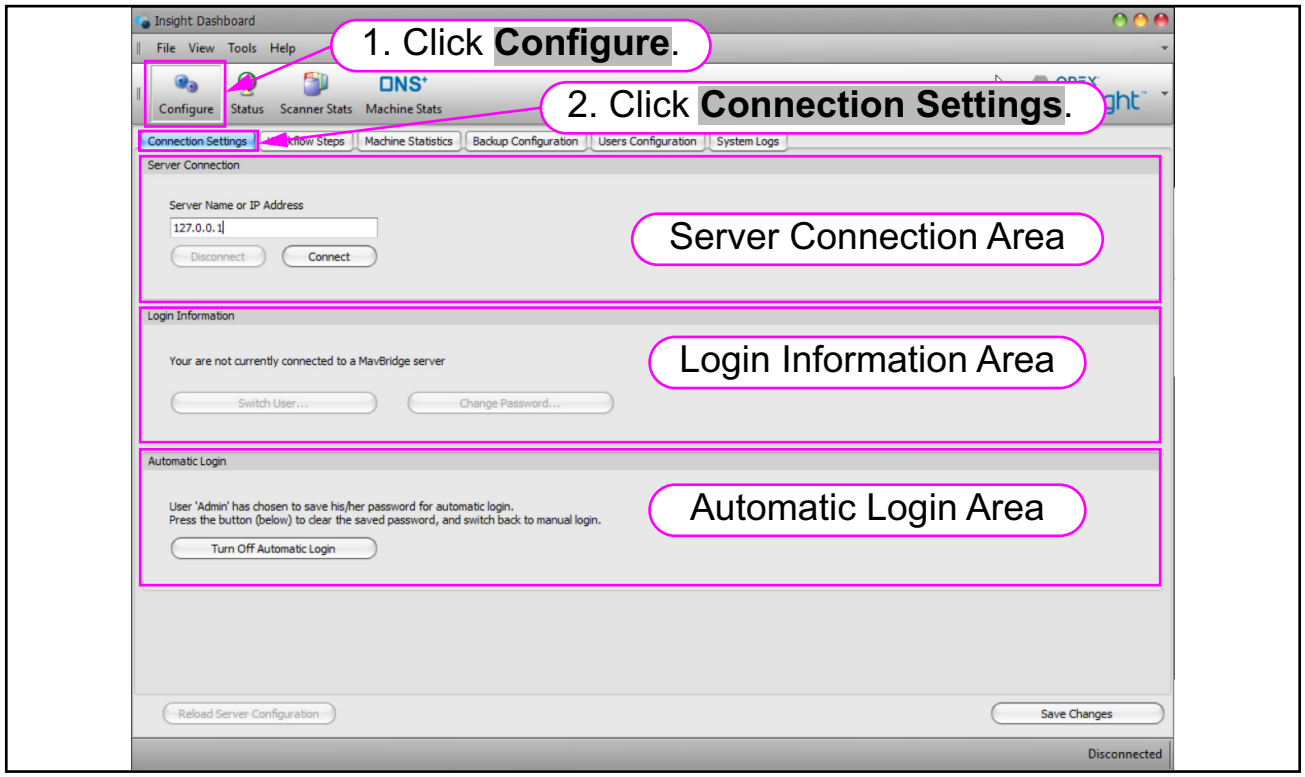

Figure 2-2: Connection Settings tab

2.2.1. Server Connection Area

The **Server Connection** area is used to create the connection between the Insight Dashboard and the Mavbridge Core Service. Typically, this area is configured by a Systems Administrator or OPEX technician during initial system implementation. It also needs to be configured on any Remote Dashboard Computer.

If a change needs to be made to this setting (e.g., when a change is made to your LAN and Insight Computer), it is recommended that you contact OPEX Tech Support for assistance.

1. Next to **Server Name or IP Address**, insert the Mavbridge Core Service location. On the Insight computer, the Mavbridge Core Service is running locally, so the address would be 127.0.0.1. On additional remote dashboard computers, use the actual IP address of the Insight computer (Figure 2-3).
2. Click on the **Connect** button. Once connected, the word "**Connected**" is displayed towards the right of the **Connect** button.
3. Click on the **Save Changes** button at the bottom right.

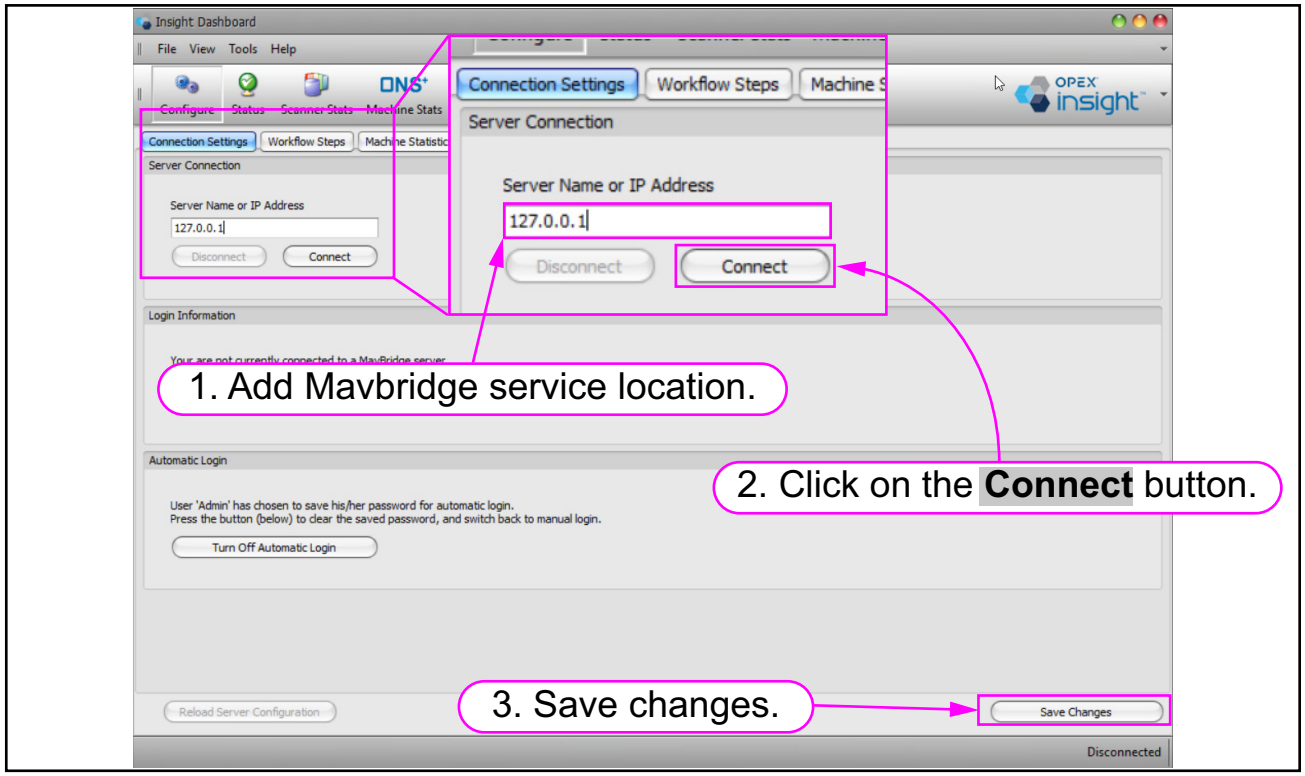

Figure 2-3: Adding location of Mavbridge Core Service

2.2.2. Login Information Area

The **Login Information** area displays the user name and access level of the person currently logged into your system. This area provides these capabilities (Figure 2-4):

- You can switch the login to a different user without closing and reopening Insight Dashboard.
- You can change your password.

To switch to a different user, follow these steps:

1. Click the **`Switch User`** button (Figure 2-4).

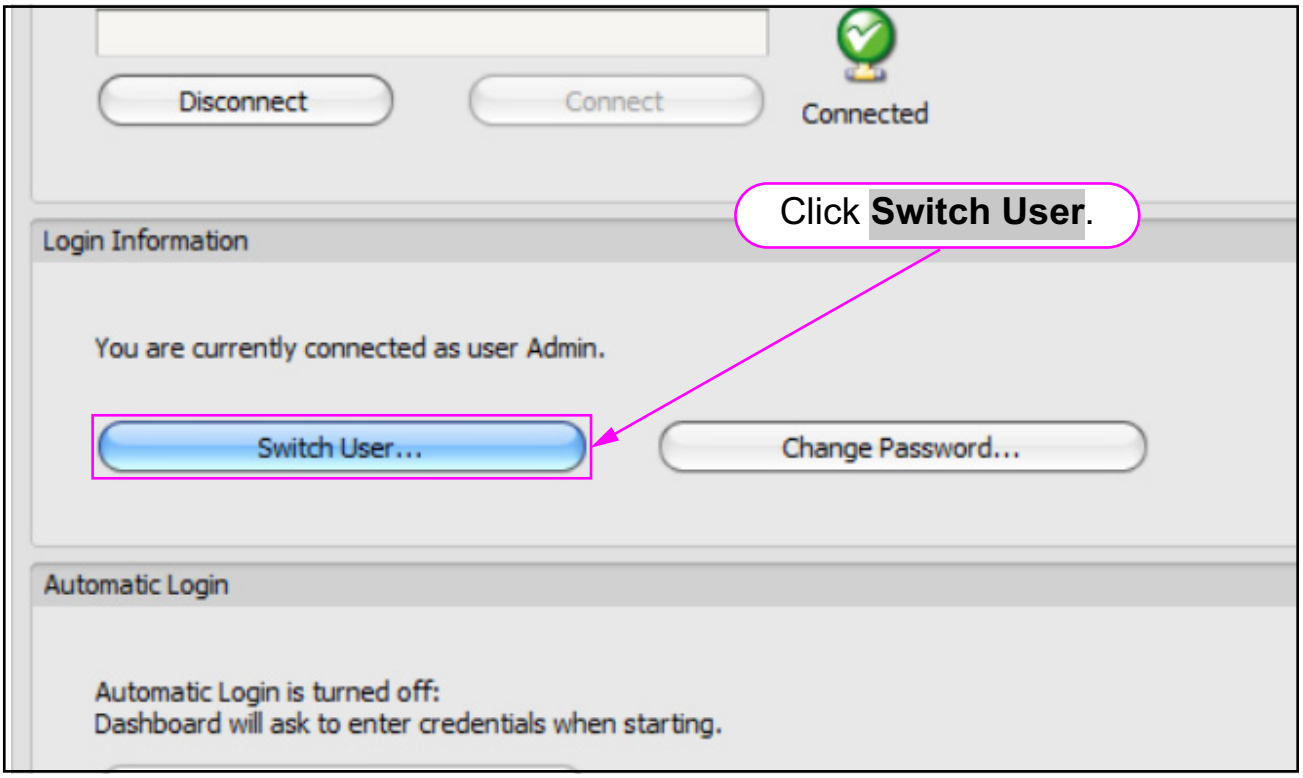

Figure 2-4: Clicking on `Switch User`

2. The **Authentication** window opens. Enter a username and password in the appropriate fields (Figure 2-5). (If desired, check **Always connect as this user** to automatically log in when launching the Insight Dashboard.)

Note: *Clicking on the* **Advanced** *button displays an additional field for changing the Insight Computer (Server) address.*

3. Click the **Log in** button to save the changes.

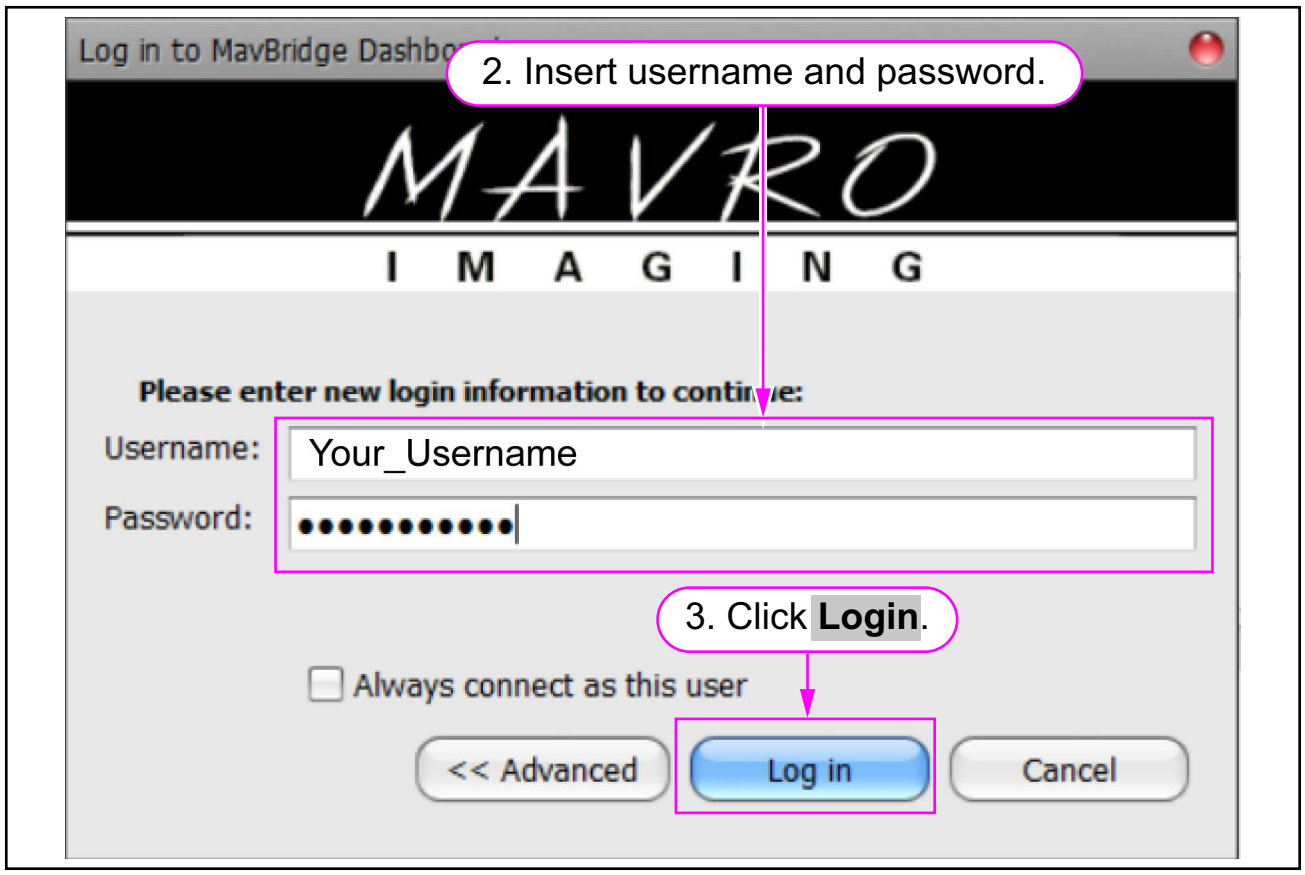

Figure 2-5: Logging in as another user

To change your password, follow these steps:

1. Click on **Change Password** (Figure 2-6).

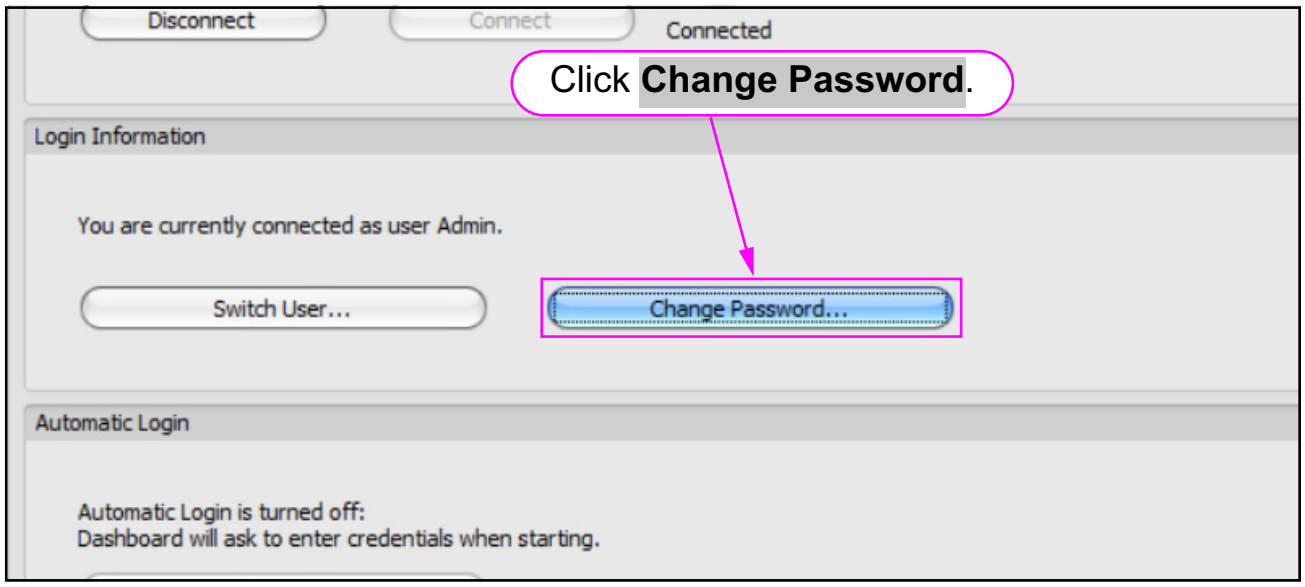

Figure 2-6: Changing your password

2. The **Change Password** dialog is displayed. Type in the current password and new password. Confirm the new password at **Confirm Password** and click **Change Password** (Figure 2-7).

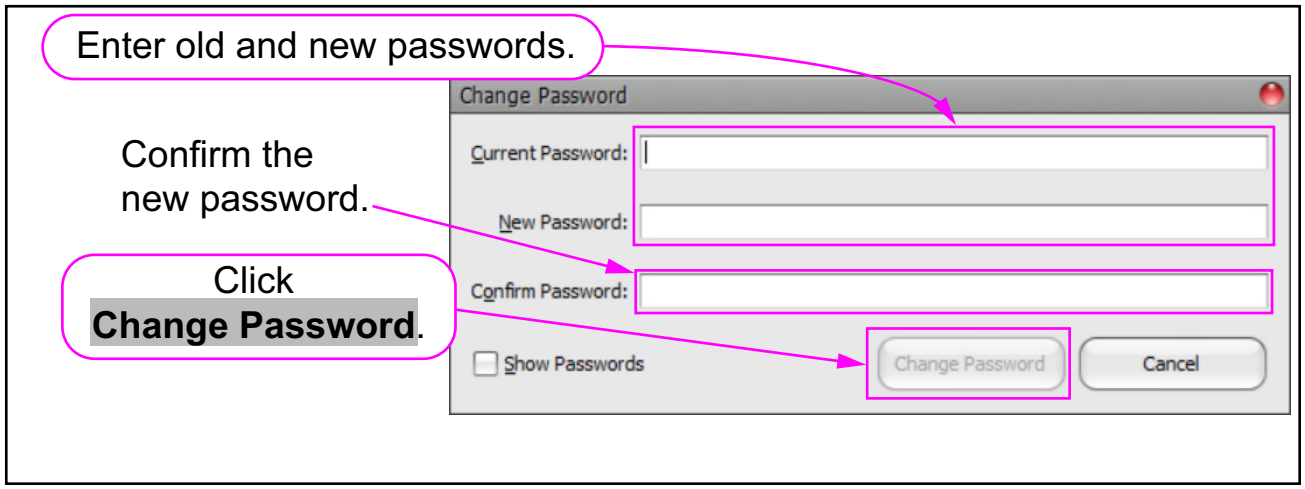

Figure 2-7: Using the Change Password dialog

2.2.3. Automatic Login Area

To turn off automatic login, follow these steps:

1. Click **`Turn Off Automatic Login`** (Figure 2-8).
2. Click **`Save Changes`** (Figure 2-8).

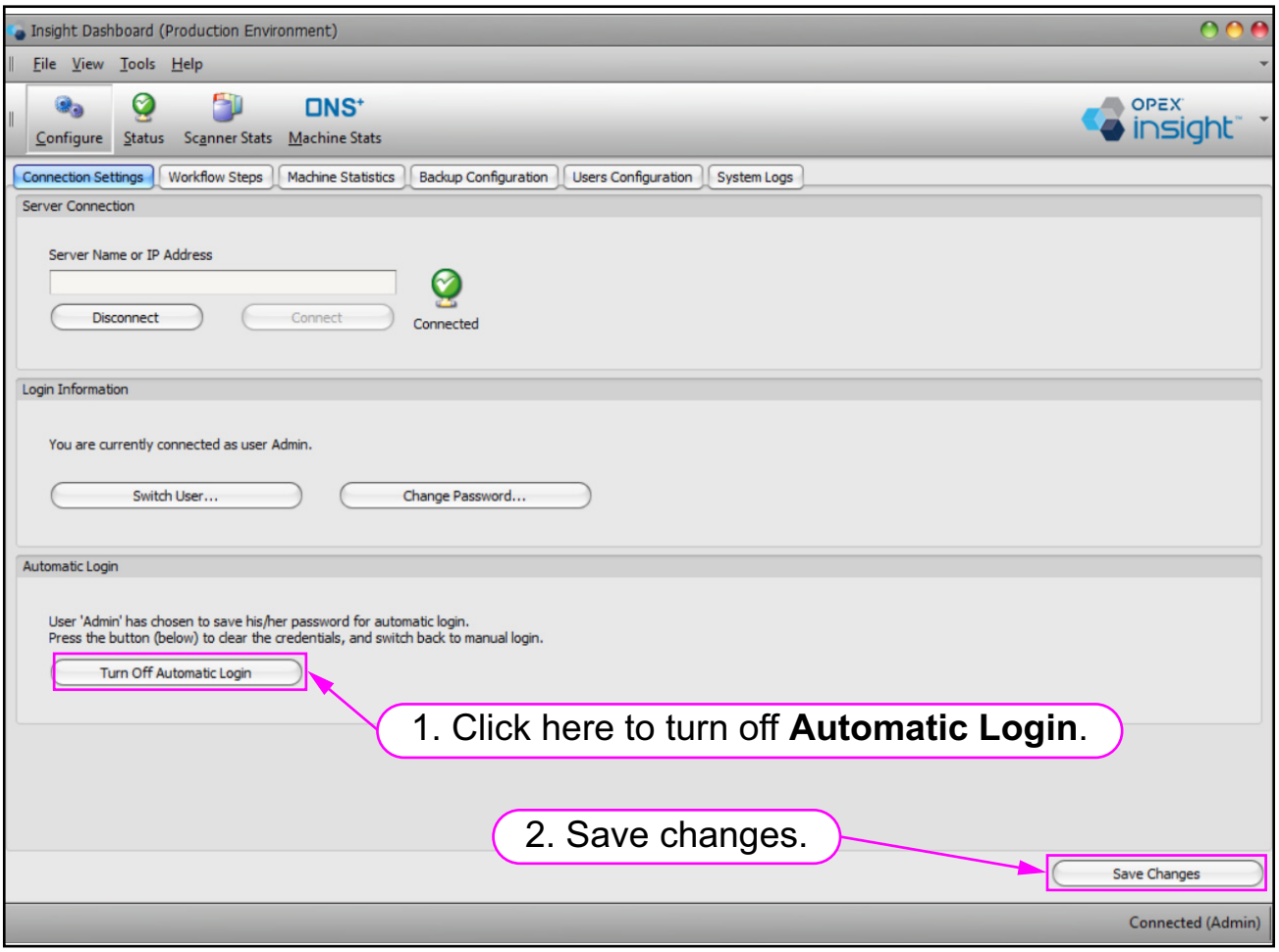

Figure 2-8: Turning off automatic login

Next time you start Insight Dashboard, you will be required to manually log in.

2.3. Machine Statistics Tab

The **Machine Statistics** tab is used to define the path to the **ONS Machine Data Folder**, i.e., where the statistics data is stored.

1. Click the `Machine Statistics` tab (Figure 2-9).
2. Click on the box labeled "**Enable Scanner Stats Import**." (Figure 2-9)

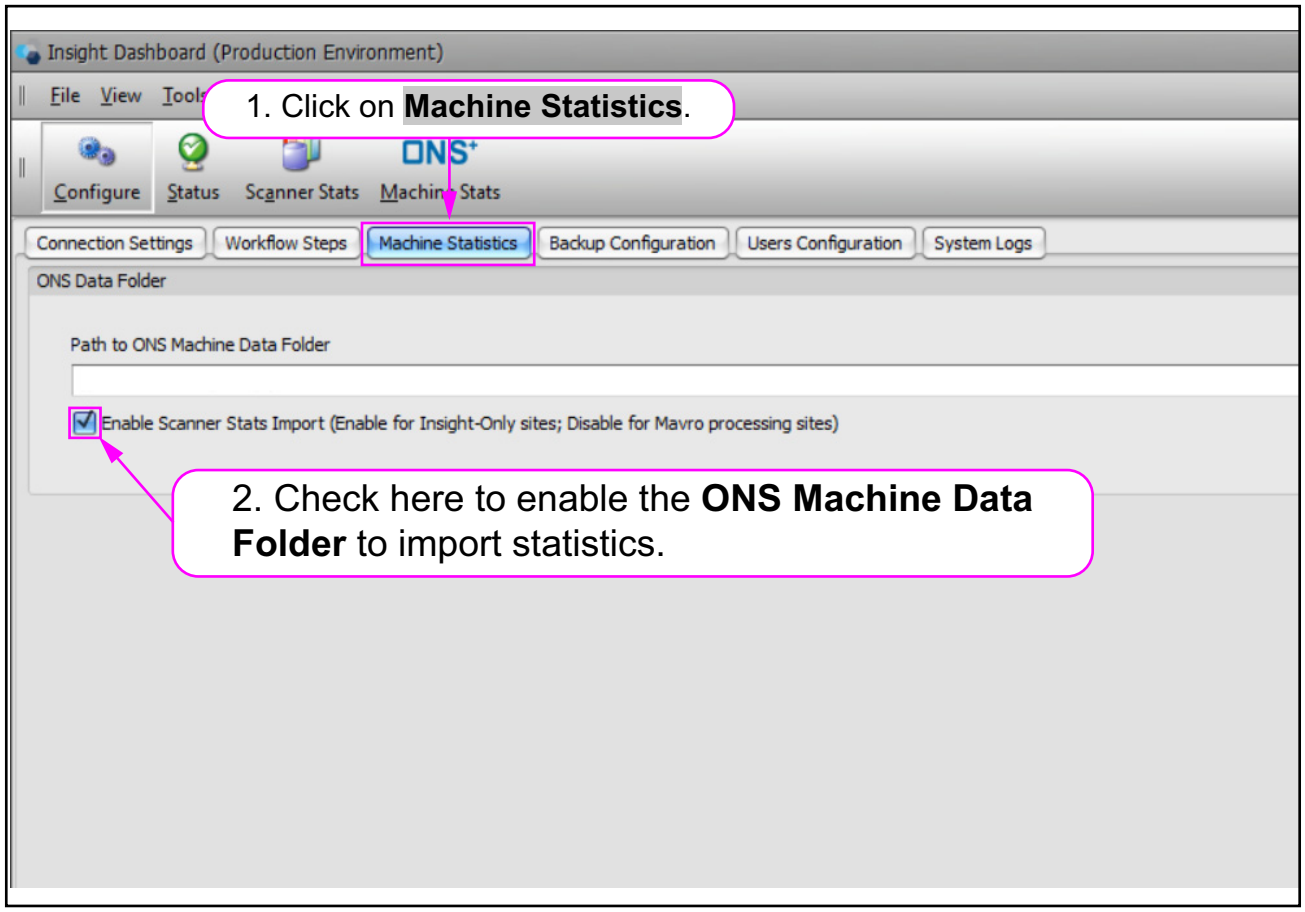

Figure 2-9: Enabling import of scanner statistics

3. Either manually type the address of the **ONS Machine Data Folder**, or click on the **Browse** button to display the **Browse For Folder** window and browse for the **ONS Machine Data Folder** (Figure 2-10).

Note: "**OPEX**" must be at the end of the path (Figure 2-10).

4. Click **Save Changes**.

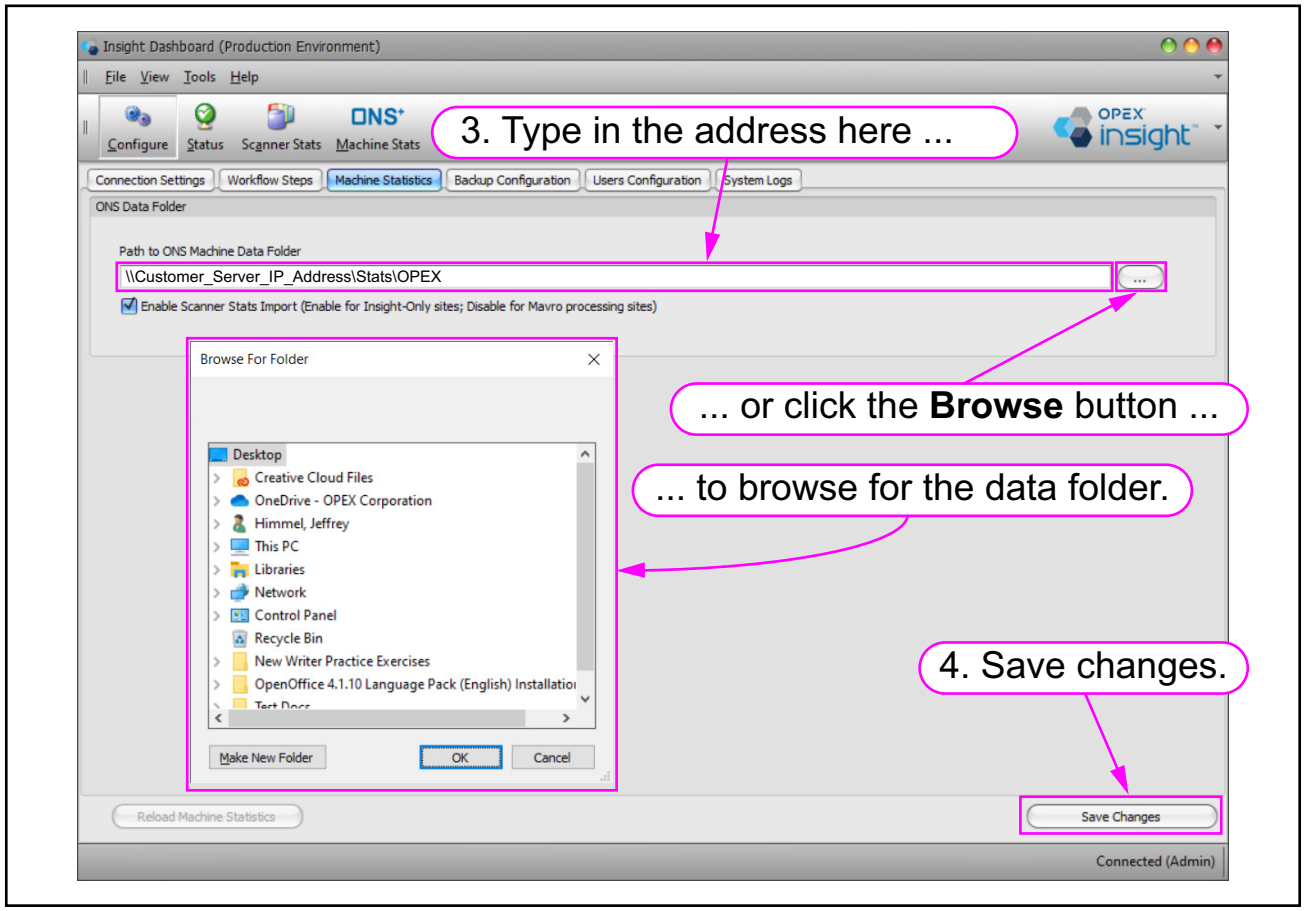

Figure 2-10: Defining the ONS Machine Data folder

5. Click **`Reload Machine Statistics`** for your changes to take effect (Figure 2-11).

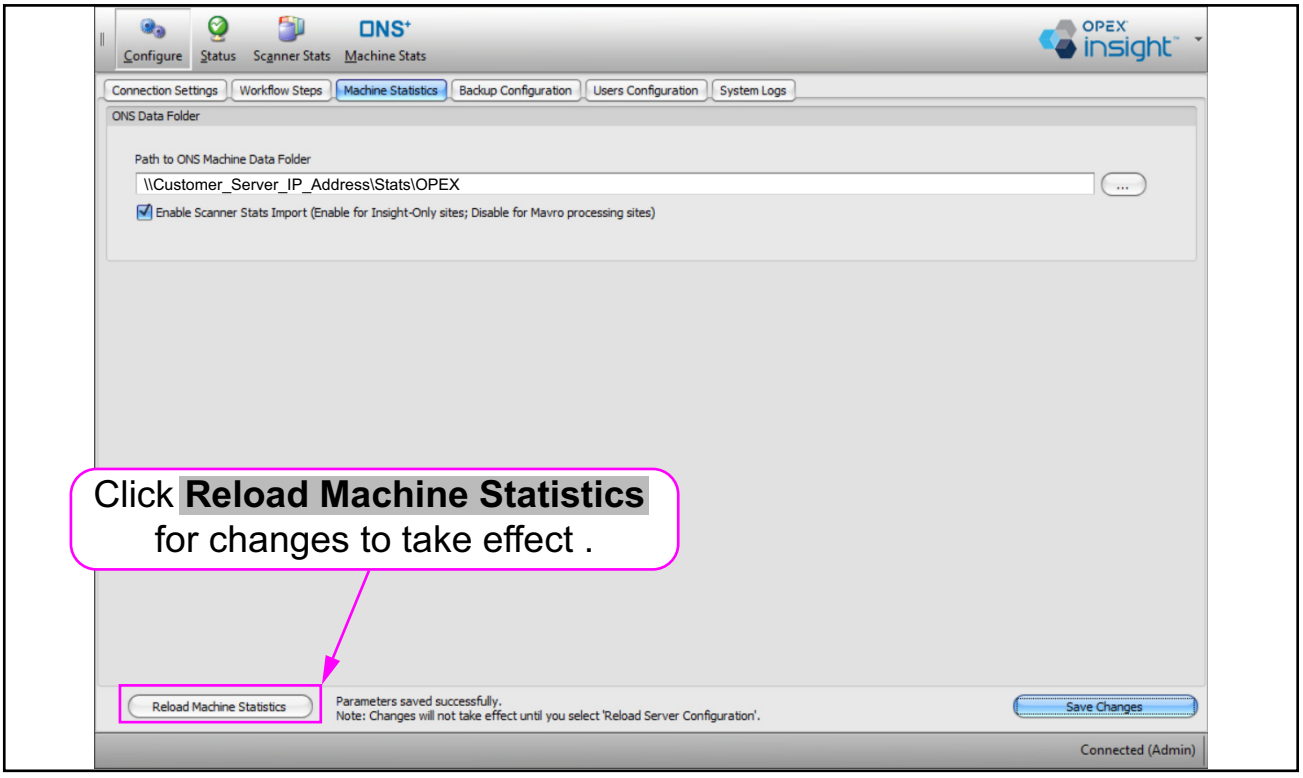

Figure 2-11: Reloading machine statistics

Within the **ONS machine data folder**, each statistics folder must be set up with a specific naming convention. Insight will look for folders inside the **OPEX** folder. The end of the path where the data is written MUST include a folder for each type of machine and a folder for each machine's serial number. The serial number folder name must have eight digits and must be front padded with zeros. Machine folders must also be named with a specific naming convention as follows:

- AS3600
- AS3690
- AS7200
- DS2200
- Eagle
- Falcon
- FalconPlus
- FalconV
- FalconVPlus
- Gemini
- Matrix
- Model50
- Model51
- Model72
- MPS40
- OM606
- Red-Link
- Sys150

Figure 2-12 is an example of an **ONS machine data folder** with the correct naming convention.

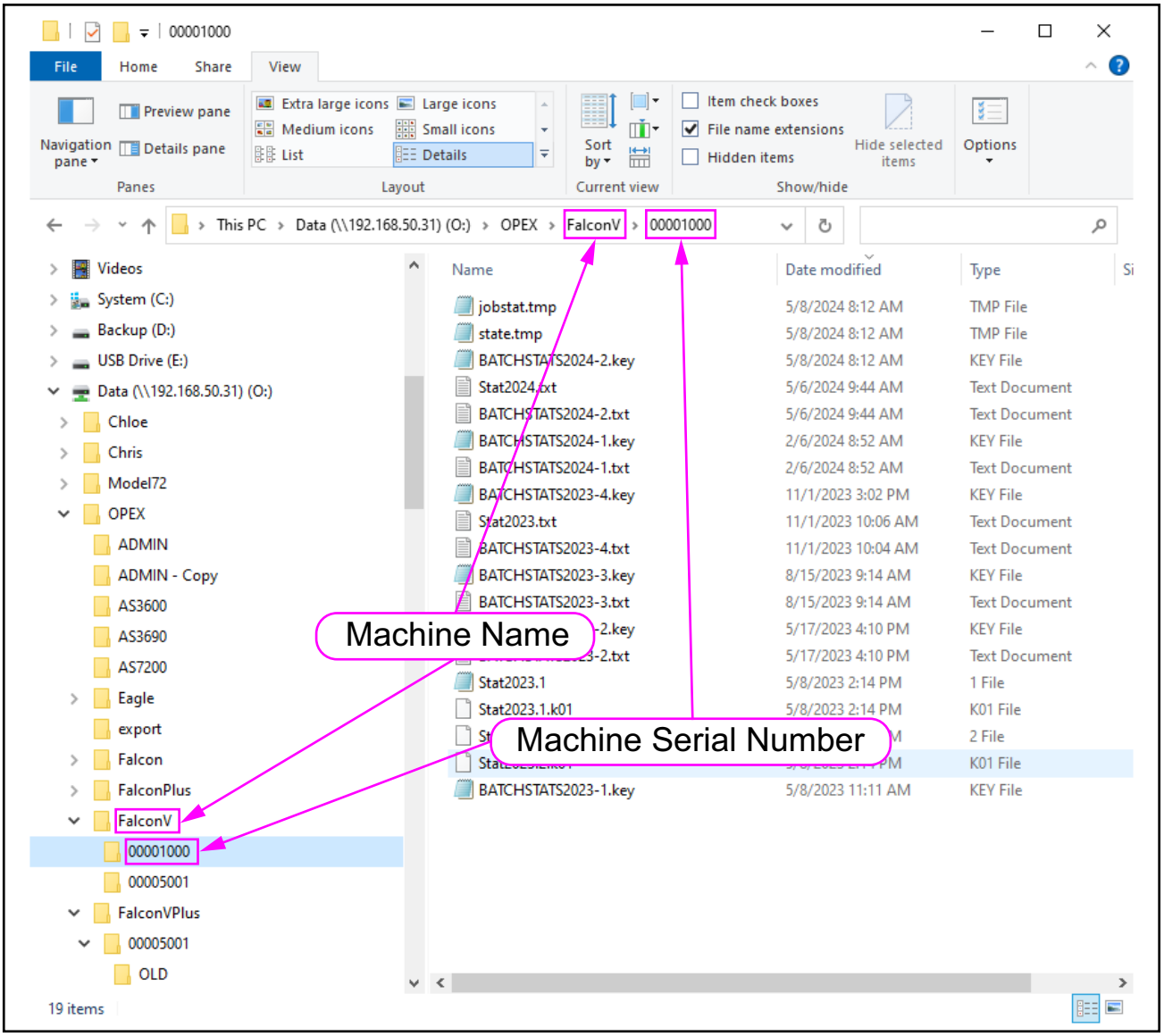

Figure 2-12: Example of ONS Machine Data Folder Naming Convention

When you are using your own server for data, an example of the **ONS Machine Data Folder** UNC path could look like this:

\\Your_Company_Server_IP_Address\Stats\OPEX\Falcon\00012345

If you use the OPEX default network configuration (in which the data is stored on an OPEX supplied NAS device), the IP address is mapped to the O:drive (Figure 2-13).

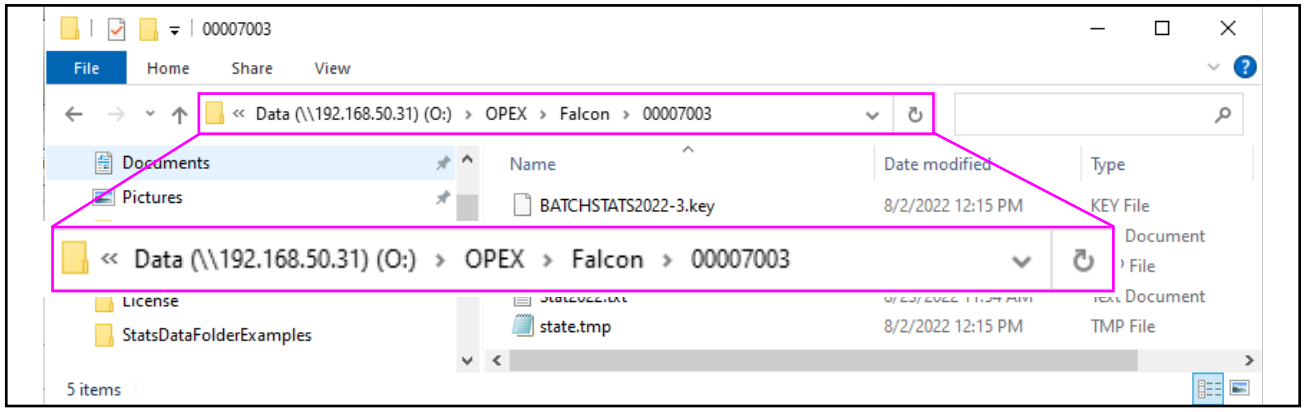

Figure 2-13: Data Folder on File Explorer when a NAS is used

2.4. Workflow Steps (Auto Export Feature)

Workflow Steps (Figure 2-14), also known as the **Auto Export**, is a feature that automatically exports statistical data as reports to a desired folder in a desired format at specified times. It is recommended to have a report run at 12:30 AM for the previous day's statistics. The two report formats available are XML and CSV. This feature can be used to automatically export the statistics report for the previous day or the current day. The automatically exported statistics files (reports) would be identical to any statistics files that you can export manually.

Note: *The data for the reports comes from the* **ONS Machine Data Folder***.*

Note: *This feature is a 64-bit program that needs a 64-bit Insight computer setup.*

Note: *Typically, the* **Auto Export** *feature is set up by an OPEX field technician during initial system implementation and* **should not be otherwise be changed***.*

Note: *Using the* ***Workflow Steps*** *tab to set up the* ***Auto Export*** *feature is recommended but not required.*

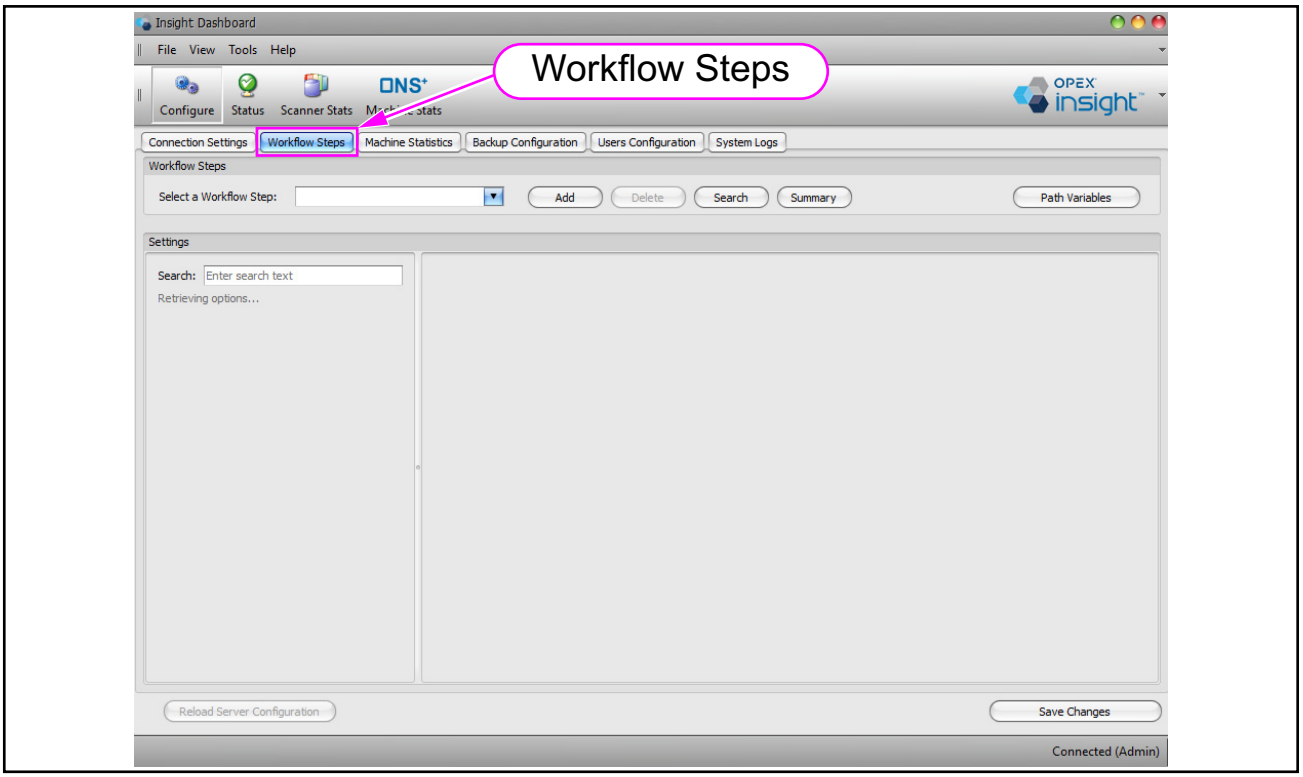

Figure 2-14: Workflow Steps

2.4.1. Enabling Auto Export

1. Update your license to include the Auto Export feature. Once that is done, towards the top of the license, the "**enable_TASK_SCHEDULER=1**" statement should be present (Figure 2-15).

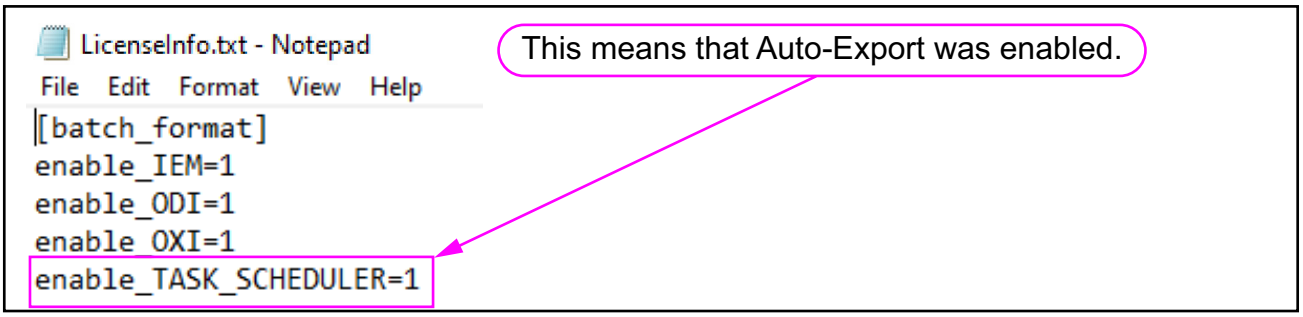

Figure 2-15: License that enables Auto Export

2. In File Explorer, open the **Configuration Files** folder (for example, **C:\InsightInstall.8.2.8\Installation Files\Configuration Files)**. Copy the **ConverterSetting.Automatic Stats Export.xml** file (Figure 2-16).

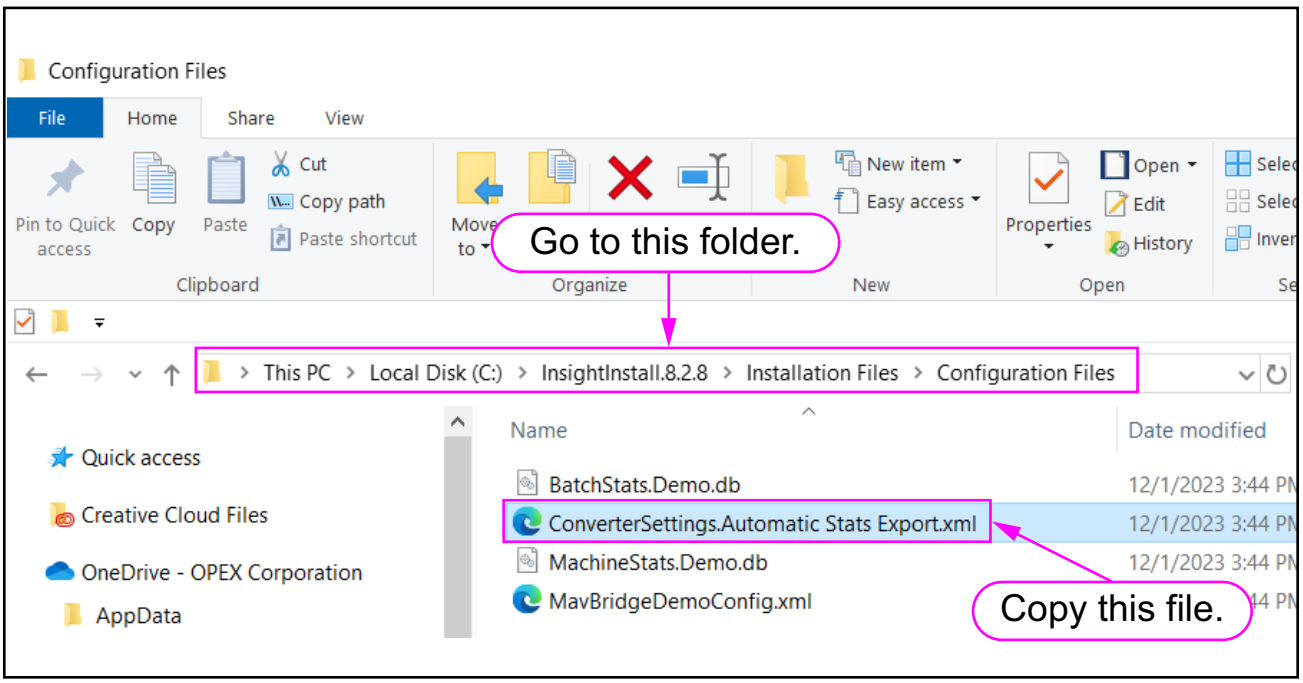

Figure 2-16: File to copy from Configuration Files folder

3. Paste the file you copied into the **C:\Mavro\MavBridge\Data\Config\MavBridge** folder (Figure 2-17).

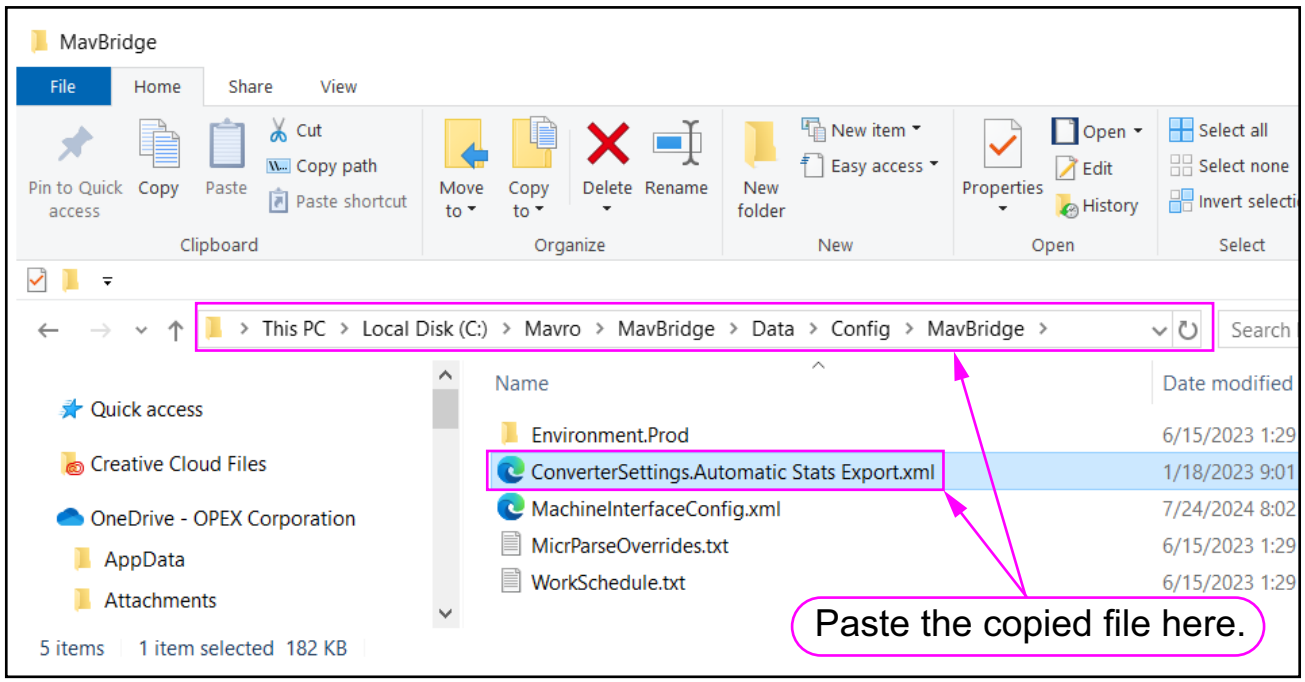

Figure 2-17: Location to paste the copied file

2.4.2. Configuring Auto Export

To configure Auto Export, first you specify the directory (folder) to which you will export a statistics report.

Next, you must change some values in script code to configure these details:

- The date to export a report.
- The batch export options (file name and format).
- The machine export options (file name and format).

Once those options are configured, you can schedule the specific time to export a report.

2.4.2.1. Specifying a Directory to Which to Export a Report

1. Start the Insight Dashboard and log in.
2. Click on the **`Configure`** tab (Figure 2-18).
3. Click on **`Workflow Steps`** (Figure 2-18).
4. Click on the drop-down box and choose **`Automatic Stats Export`**. This loads the default setting for the Auto Export feature (Figure 2-18).

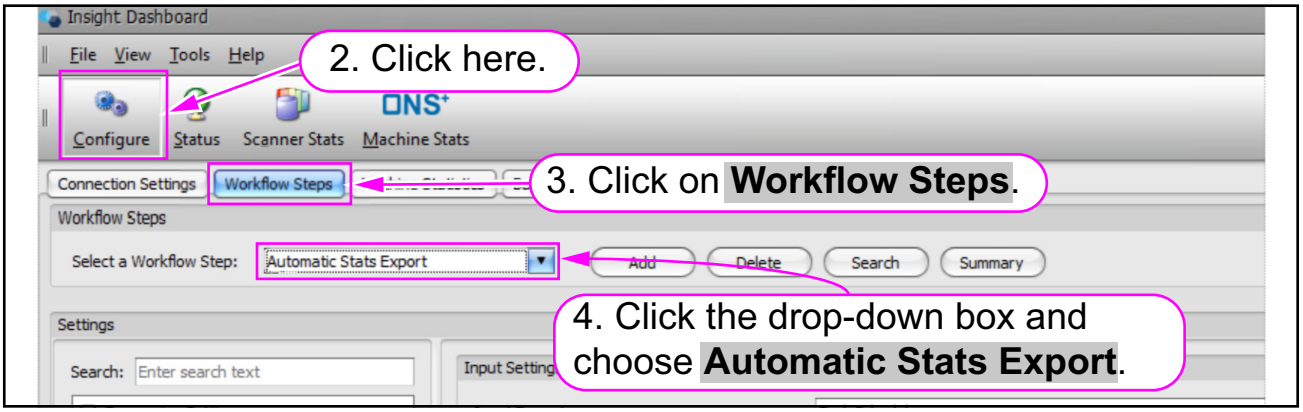

Figure 2-18: Selecting Automatic Stats Export

5. In the left column, select **`General`** (Figure 2-19).

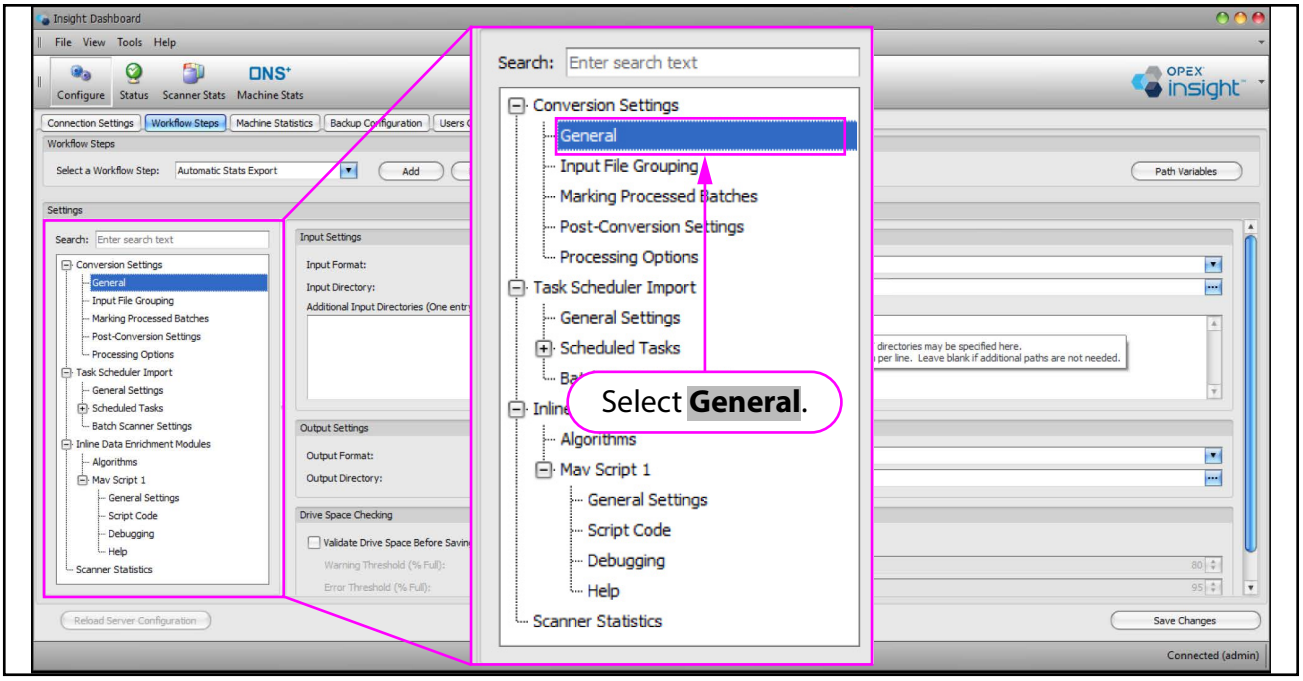

Figure 2-19: Selecting `General`

6. In the right column, after **Input Directory**, type in or browse to the folder in which you want to save the stats (Figure 2-20).

Note: *If saving to a network drive, use the UNC path in this field. Leave* **\Schedule** *at the end of the path. This will create the necessary folders.*

7. Click on **Save Changes**.

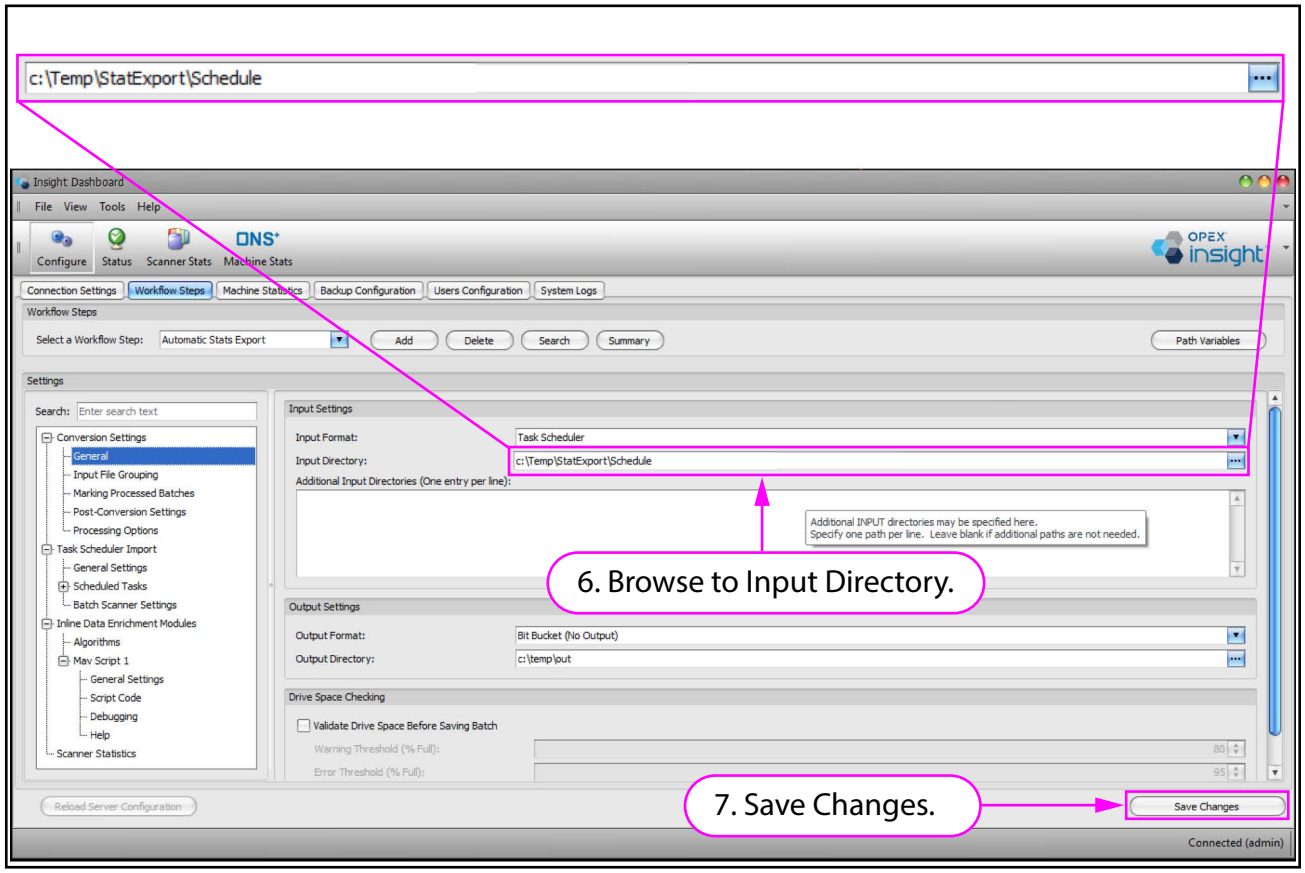

Figure 2-20: Specifying the input directory

2.4.2.2. Configuring to Export Today's or Yesterday's Stats

1. In the left column, select `Mav Script 1`, expand that section, and select `Script Code`. This causes script code to be displayed in the right column (Figure 2-21).

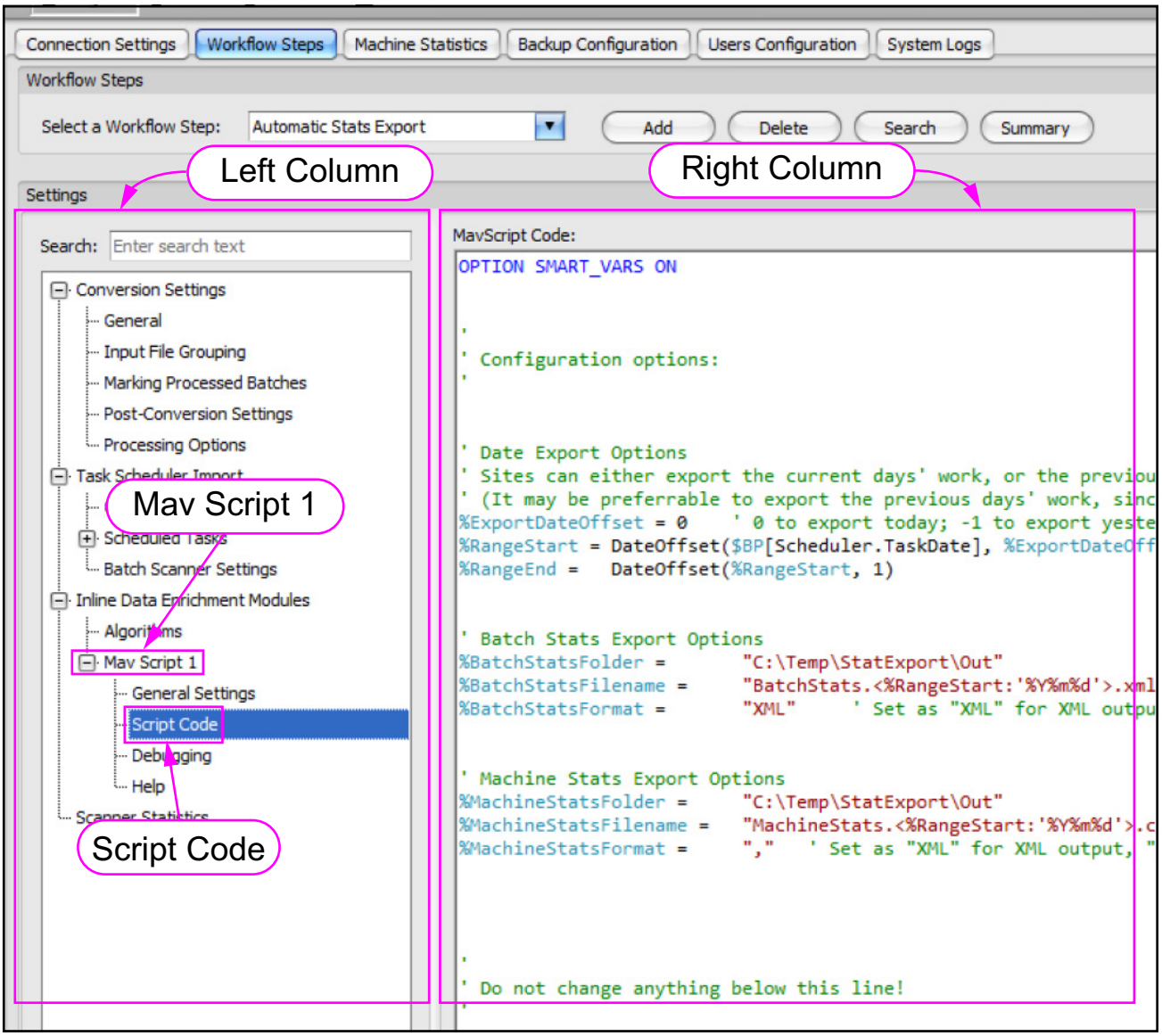

Figure 2-21: Selecting `Script Code`.

2. Look at the top of the script code in the right column. Locate the section of script code labeled in Figure 2-22 as Box 1, Box 2, Box 3, and Box 4.

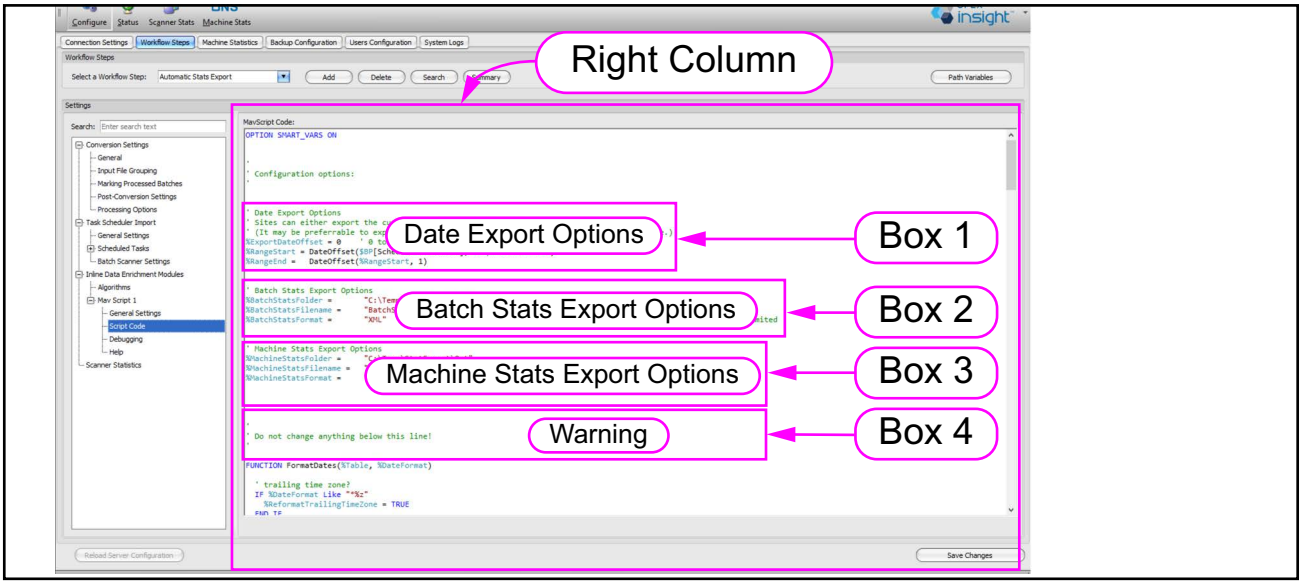

Figure 2-22: Script code on the right side.

3. In the script code labeled as Box 1 (for **Date Export Options**), edit the value of **%ExportDateOffset** to be one of the following (Figure 2-23):
   - 0: This exports today's stats.
   - -1: This exports yesterday's stats.

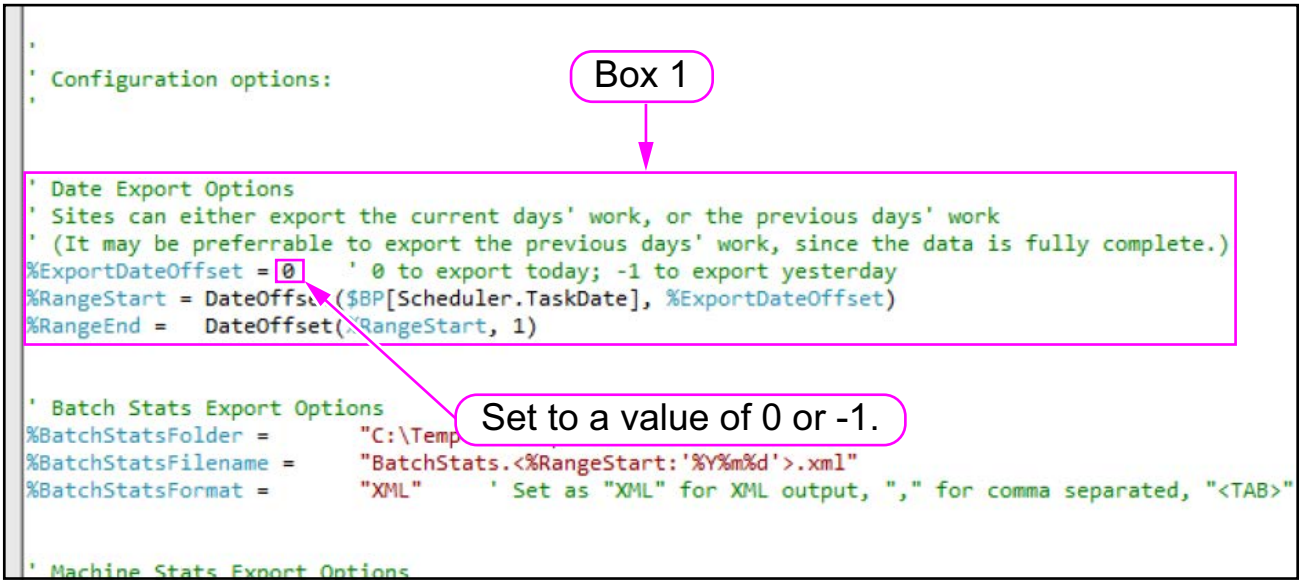

Figure 2-23: Setting Date Export Options (Box 1).

2.4.2.3. Configuring Batch Stats Export Options

The script code in Box 2 allows you to configure the batch statistics export options for the batch statistics report.

1. Change the value of **%BatchStatsFilename** to the name you want for the exported file (Figure 2-24).
2. Change the value of **%BatchStatsFormat** to determine the file format of the exported file (Figure 2-24).
   - A value of "**XML**" exports an XML (Extensible Markup Language) format.
   - A value of "**,**" exports the file in CSV (comma-separated value) format.
   - A value of "**<TAB>**" exports the file in tab delimited format.

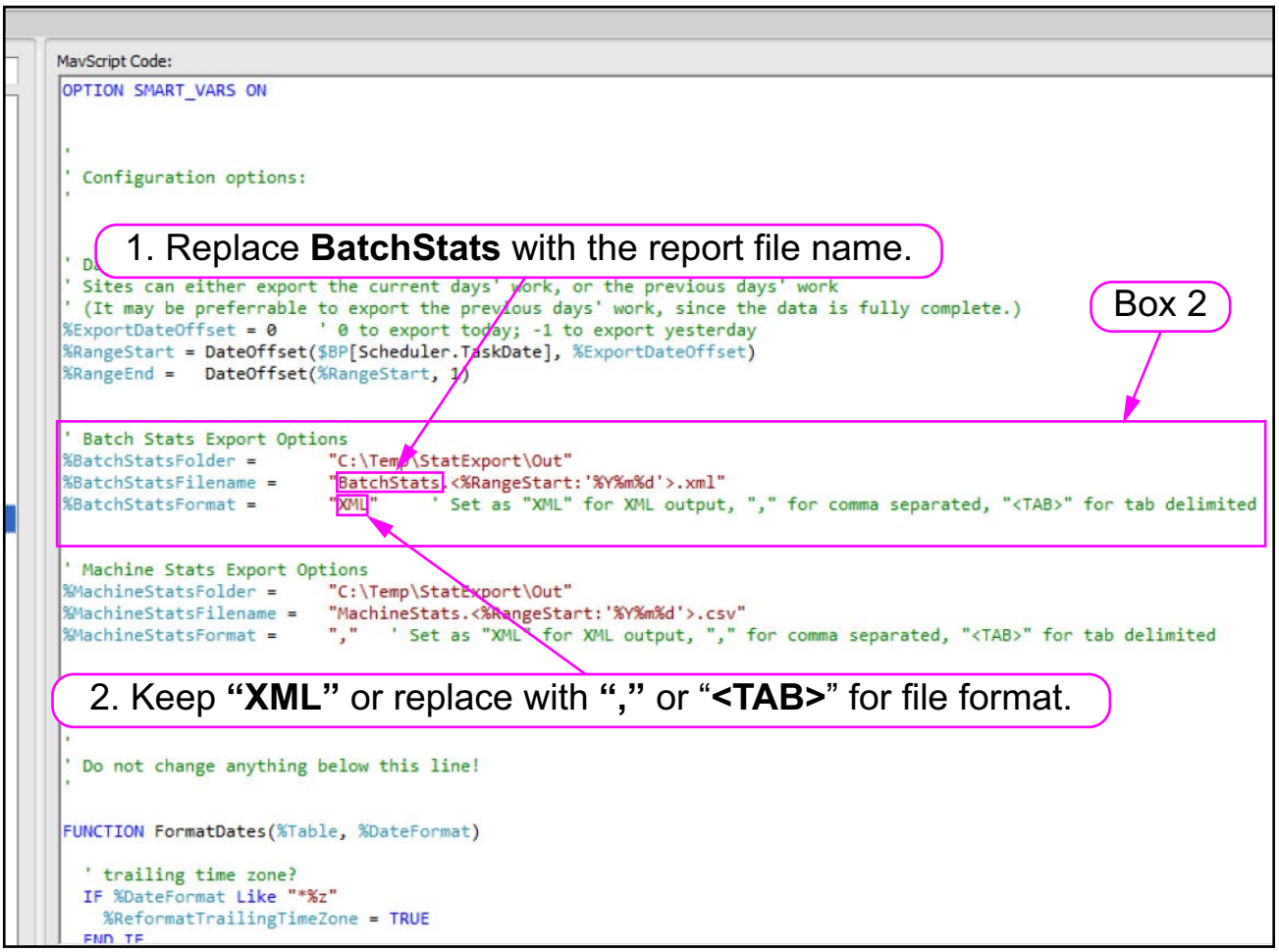

Figure 2-24: Configuring Batch Stats Export Options.

2.4.2.4. Configuring Machine Stats Export Options

The Box 3 section of script code allows you to configure the Machine statistics export options for the machine statistics report.

1. Change the value of **%MachineStatsFilename** to the name you want for the exported file (Figure 2-25).
2. Change **%MachineStatsFormat** to determine the file format of the exported file (Figure 2-25).
   - A value of "**XML**" exports an XML format.
   - A value of "**,**" exports the file in CSV format.
   - A value of "**<TAB>**" exports the file in tab delimited format.

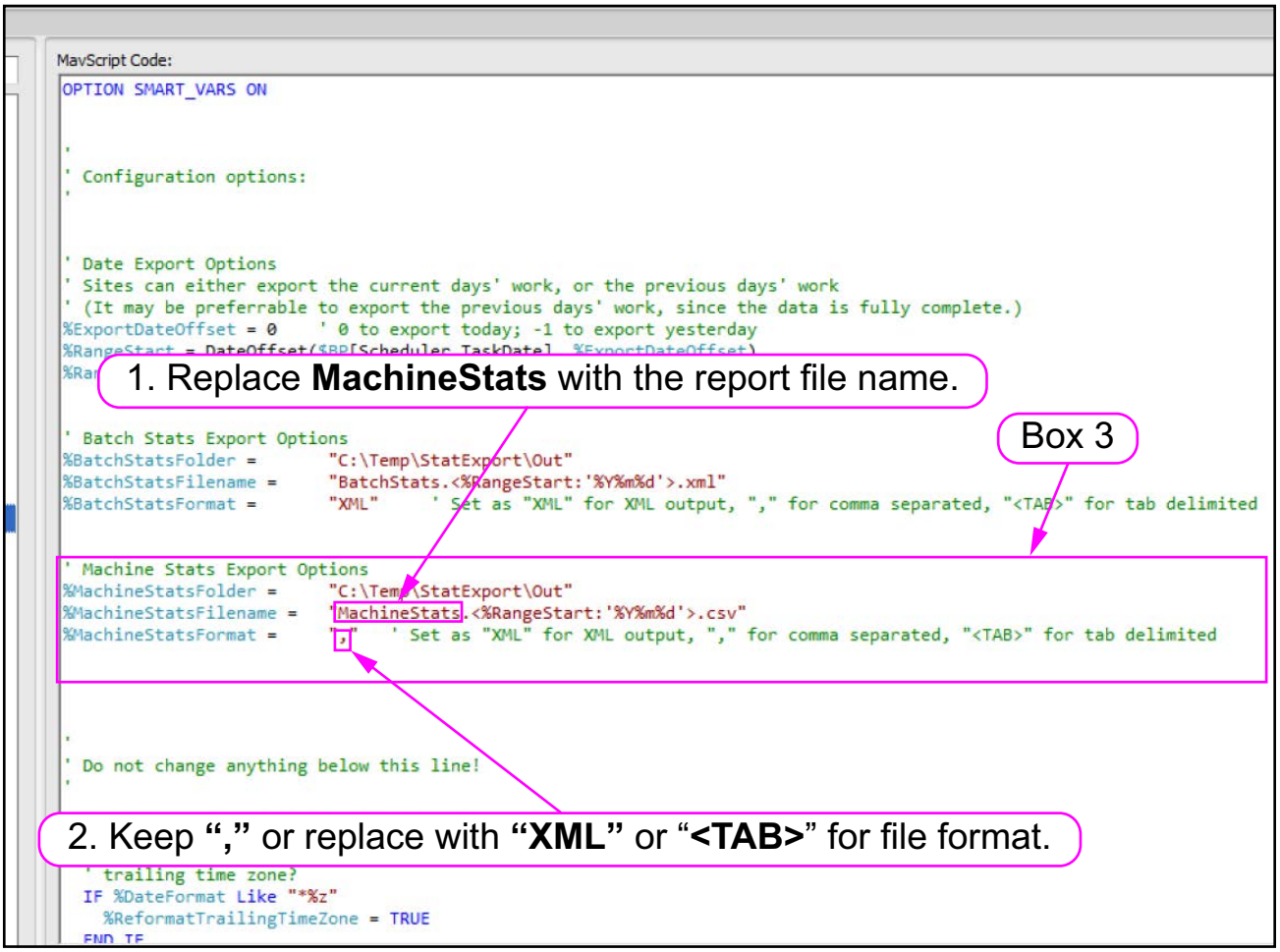

Figure 2-25: Configuring Machine Stats Export Options.

2.4.2.5. Warning (Box 4) Section of the Script Code

The section of the script code labeled as Box 4 is just a warning not to make any changes to any script code below it (Figure 2-26).

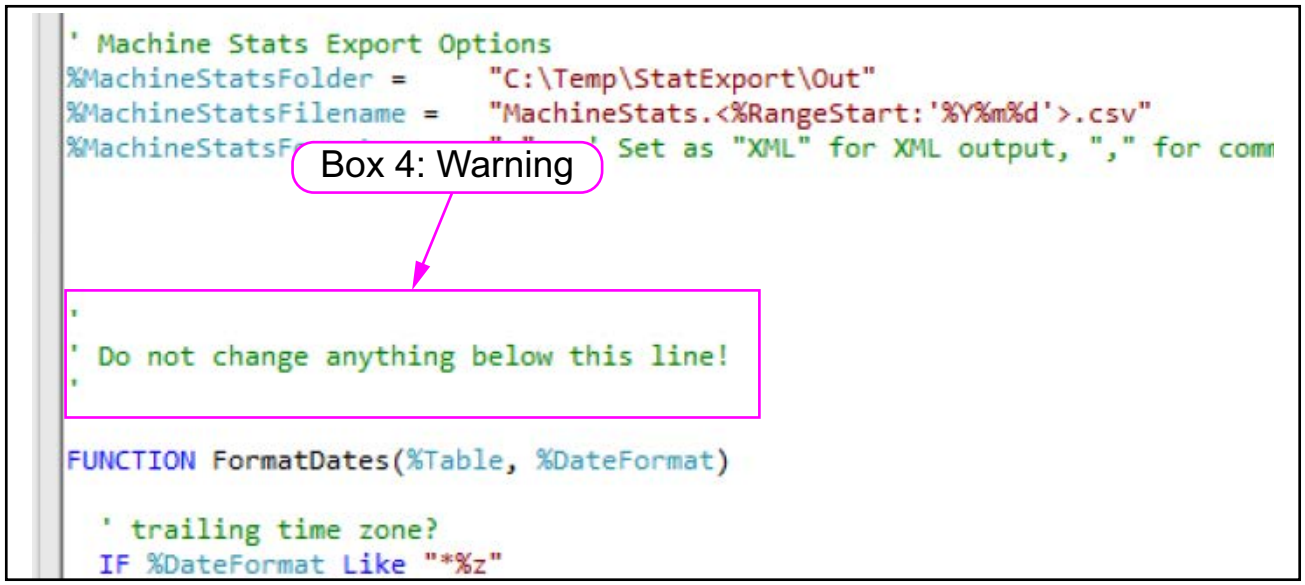

Figure 2-26: Box 4 of the script code.

2.4.2.6. Scheduling Tasks

The next step is to schedule specific times, or tasks, for exporting statistics reports. Up to five tasks can be scheduled. Below is the description of scheduling Task 1.

1. In the left column, expand the drop-down of **`Scheduled Tasks`**.
2. Click on **`Task1`** (Figure 2-27).

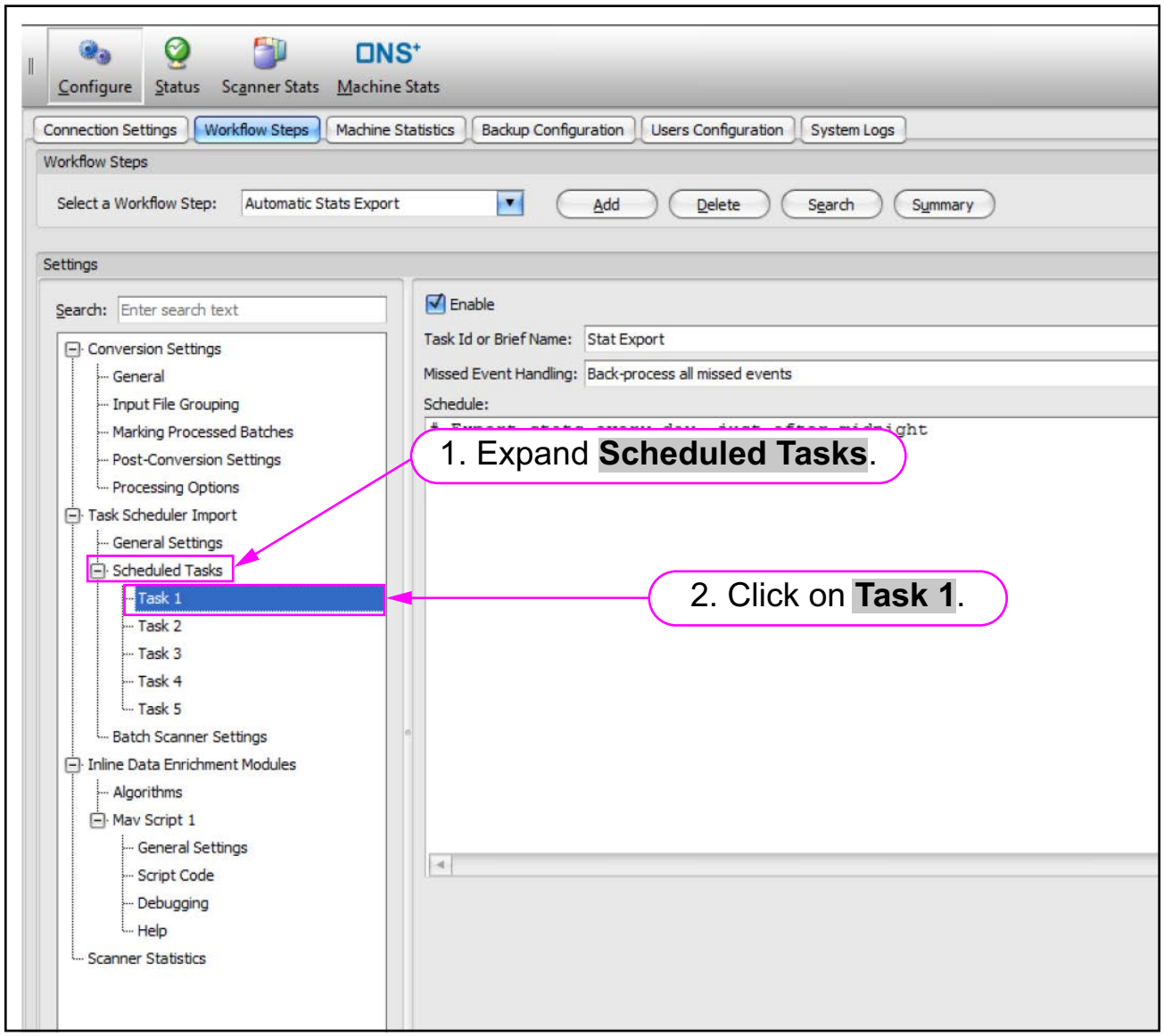

Figure 2-27: Clicking on a task.

3. In the right column, make sure that the **Enable** box is checked (Figure 2-28).
4. In the right column, schedule a time for the automatic export in 24-hour format (Figure 2-28). (For example, for 11:30 PM, type in `23:30`.)

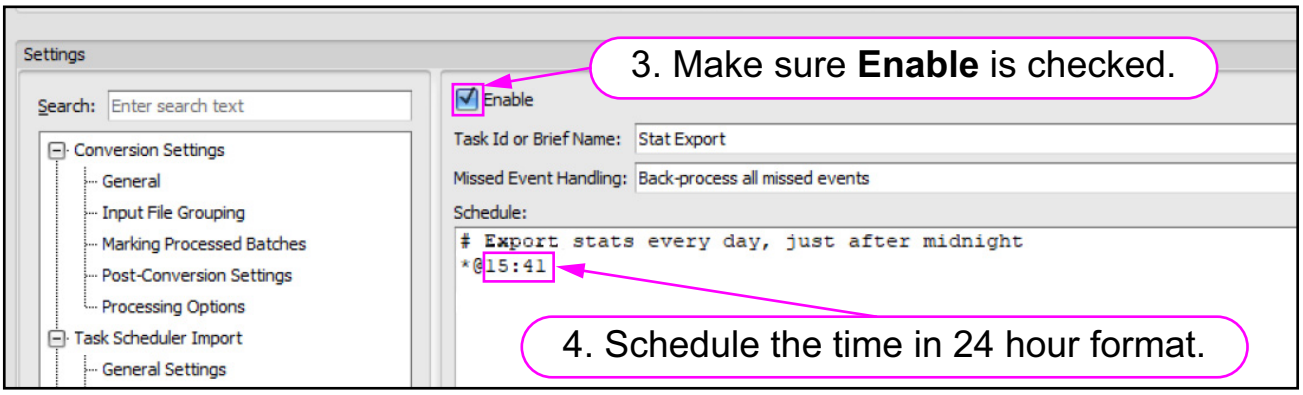

Figure 2-28: Scheduling a task.

5. Click on `Save Changes` (Figure 2-29).
6. Click on `Reload Server Configuration` for changes to go into effect.

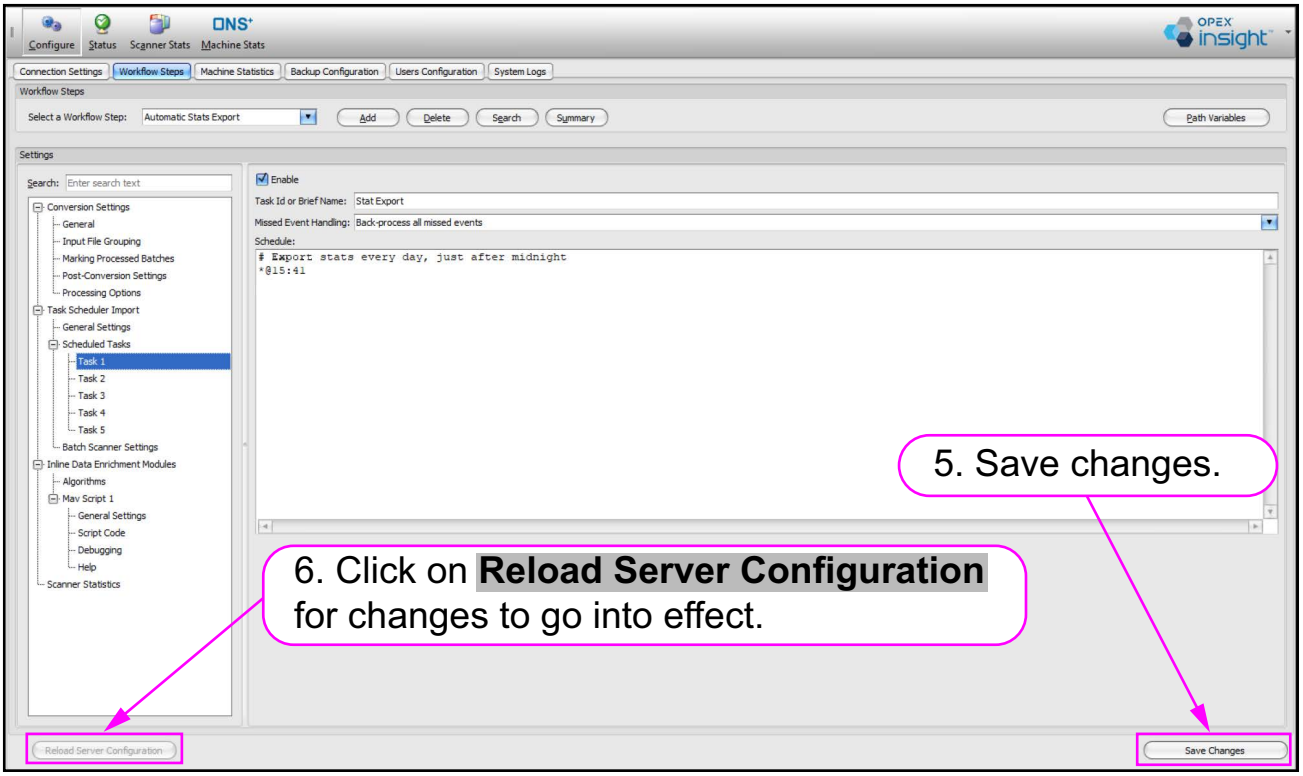

Figure 2-29: Saving the scheduled task.

2.4.2.7. Confirming that Auto Export was Properly Configured

1. To confirm that the Auto Export configuration was set up correctly, look in the directory that you specified in the general setting. Confirm that there is an **Out** folder and a **Schedule** folder (Figure 2-30).

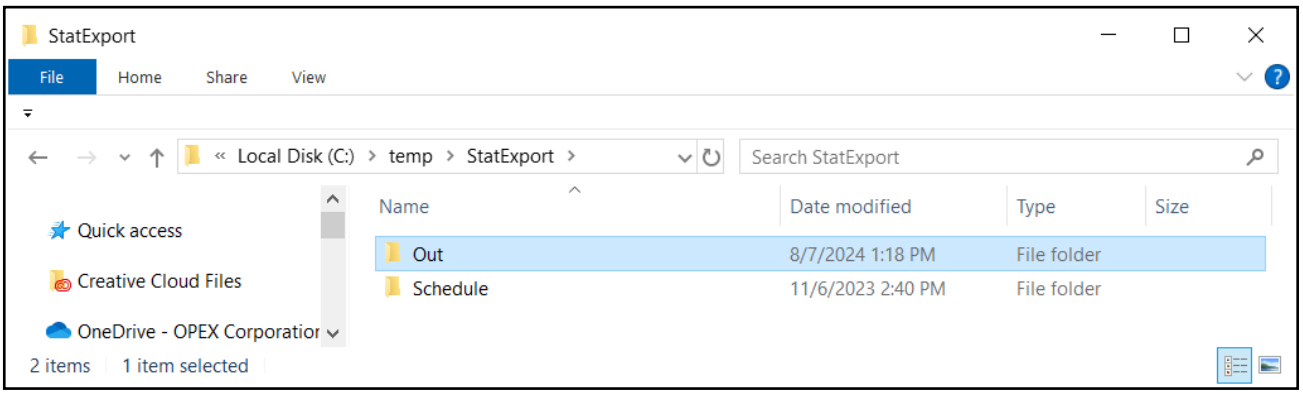

Figure 2-30: Out folder and Schedule folder.

2. After some stats reports have been exported, look in the **Out** folder. Confirm that stats reports are populated based on the file format selected in the **Mav Script** code section. This folder will grow as more stats are automatically exported (Figure 2-31).

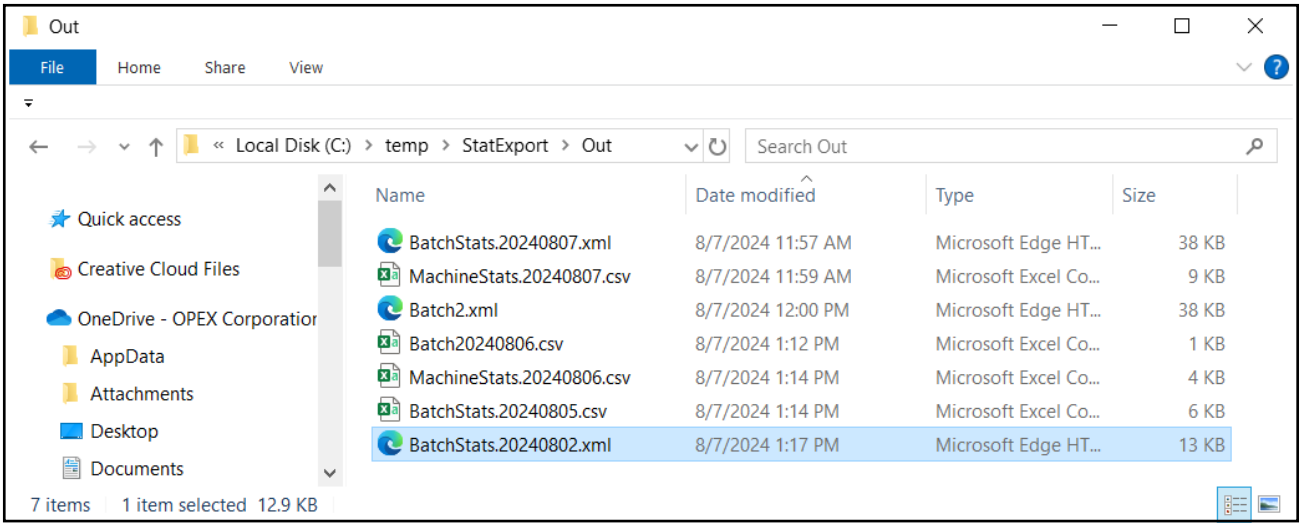

Figure 2-31: Files in the Out folder.

2.5. Backup Configuration Tab

The **Backup Configuration** tab is used to perform a quick backup of your system's configuration settings, statistics, and logs (Figure 2-32). It uses the following fields and buttons:

1. **Quick Backup:** Backup of configuration settings.
2. **Download Latest Config Backup:** Download zipped file of backup settings to the desired folder.
3. **Full Backup:** Backup of configuration, statistics, and logs to the backup folder.
4. **Backup Folder Path:** Folder location for backups.
5. **Site Name:** Useful when running multiple Dashboards for different locations.
6. **Files to Exclude:** Type or copy in names of files that you don't want to backup.
7. **Save Changes:** Save the changes of the backup options.
8. **Reload Backup Configuration:** Click for changes to take effect.

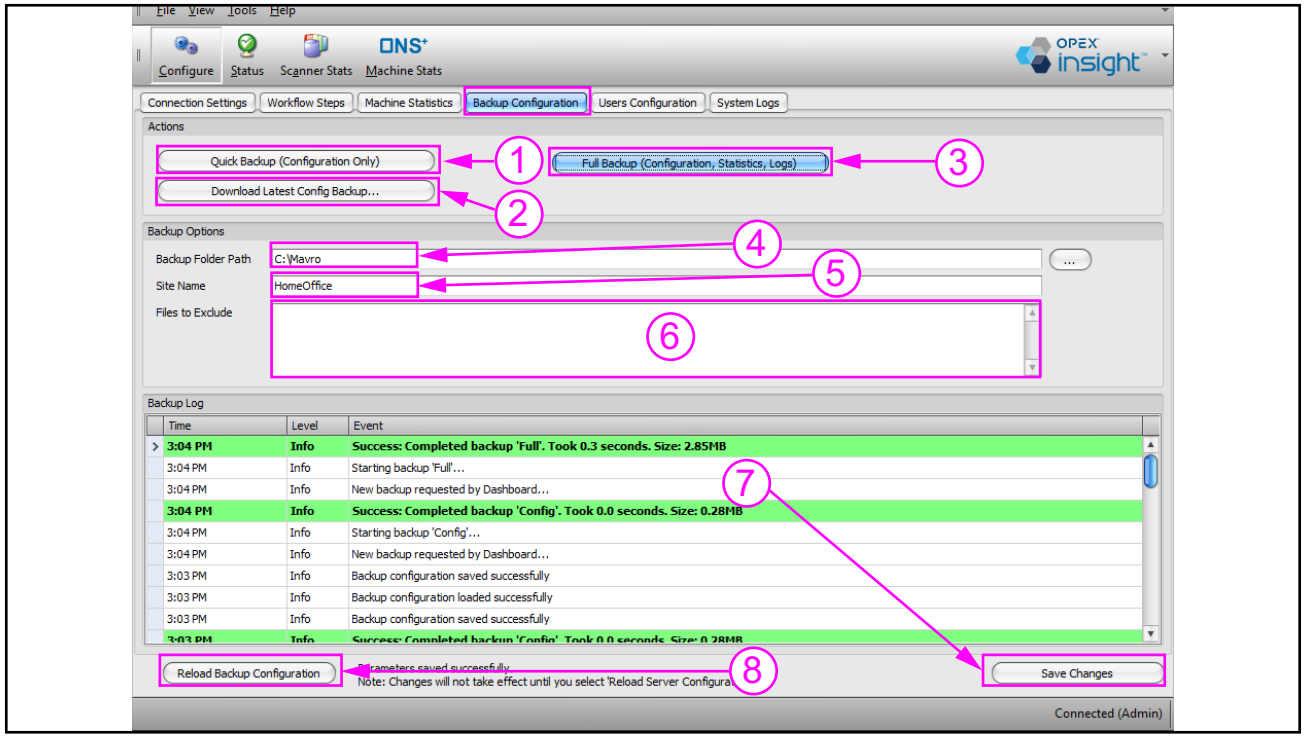

Figure 2-32: Backup Configuration tab.

In Figure 2-33 is an example of a full backup file for a “Home Office” site.

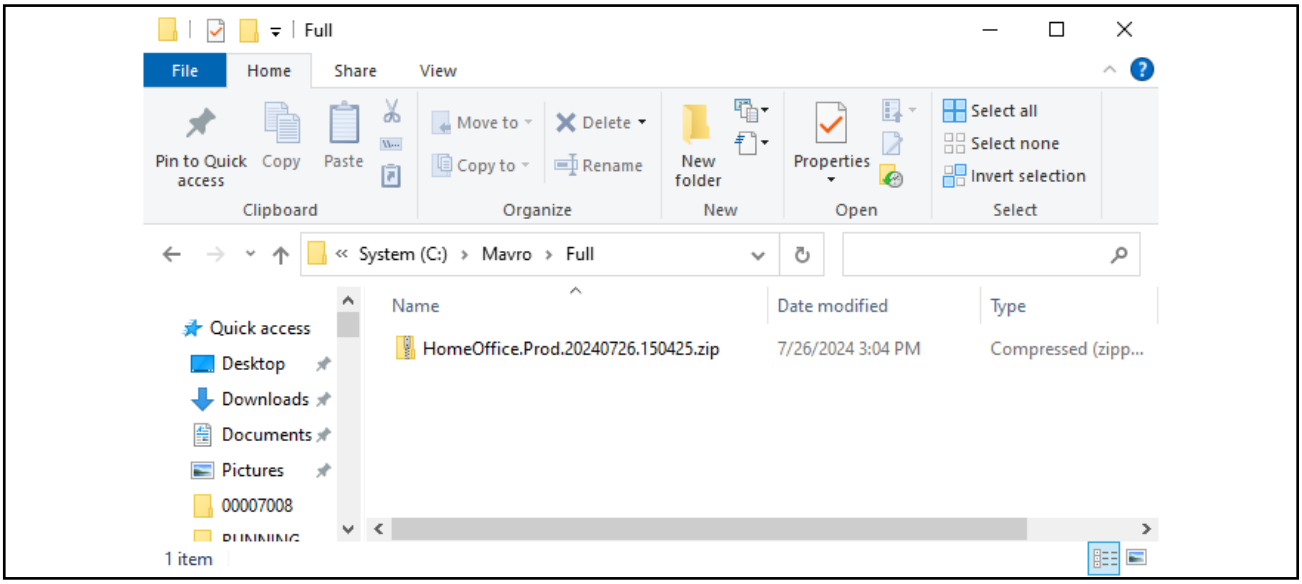

Figure 2-33: Full backup of the “Home Office” site.

2.6. Users Configuration Tab

The **User Configuration** tab allows supervisory personnel to quickly set user access to the features available in the Insight Dashboard. Here is the summary of this tab's features:

1. **Users:** For adding, deleting, and configuring users.
2. **Groups:** For adding, deleting, and configuring groups.
3. **Setup:** For configuring Active Directory and Windows domain integration settings.
4. **Policy:** For configuring password policy.

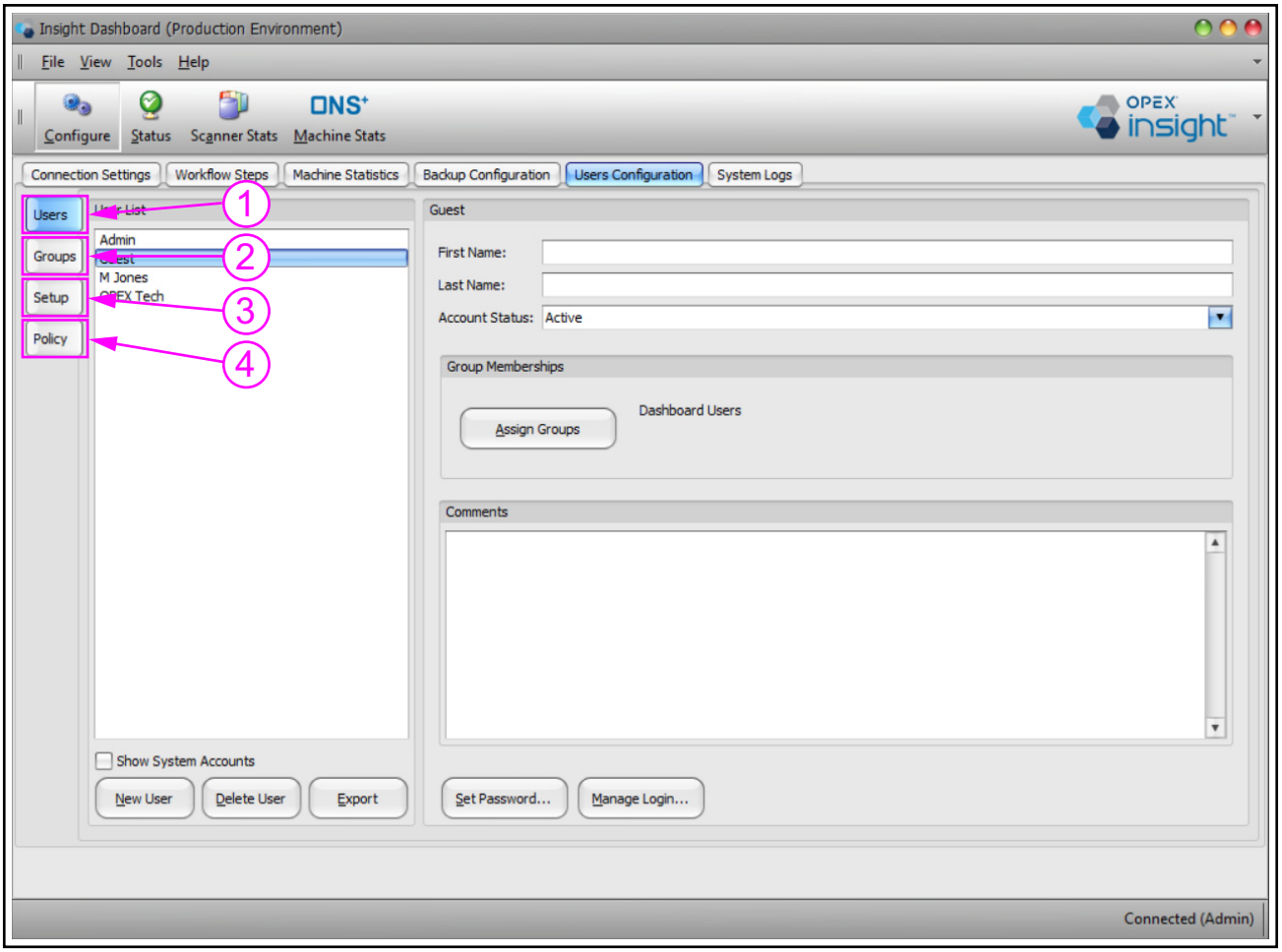

Figure 2-34: User Configuration Overview.

Note: *The descriptions on the following pages for configuring users, configuring groups, and configuring password policy* ***only apply in their entirety to an OPEX Insight system that is not integrated with Microsoft Active Directory****.*
If your system is integrated with Microsoft Active Directory, some of the information will apply, but configuration will vary based on the level of integration and the specific requirements of your system.
If your system is integrated with Microsoft Active Directory and you need assistance with user configuration, please contact OPEX Technical Support.

2.6.1. Policy

Policy refers to the rules for user passwords, such as the minimum number of characters, the complexity of the required password character set, etc.

Note: *If your system is integrated with Microsoft Active Directory, the password policy set here will be ignored, and the password policy will be determined by the Active Directory settings.*

Click **`Policy`**. The password policy display appears (Figure 2-35).

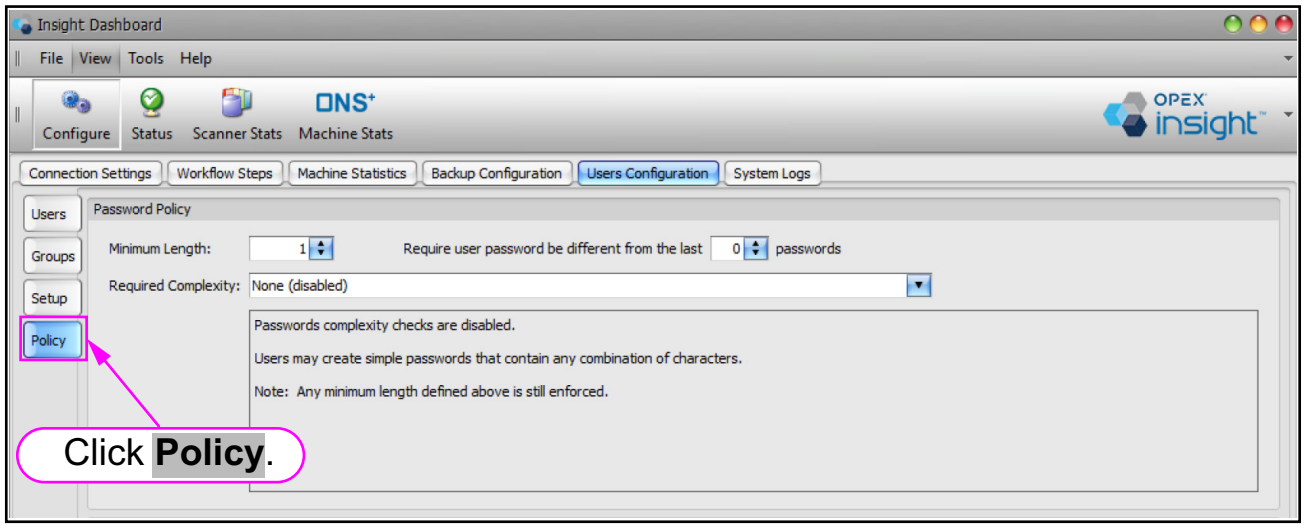

Figure 2-35: Clicking on Policy.

The entire policy display is divided into three sections (Figure 2-36):

1. Password Policy
2. Password Expiration
3. Account Lockout

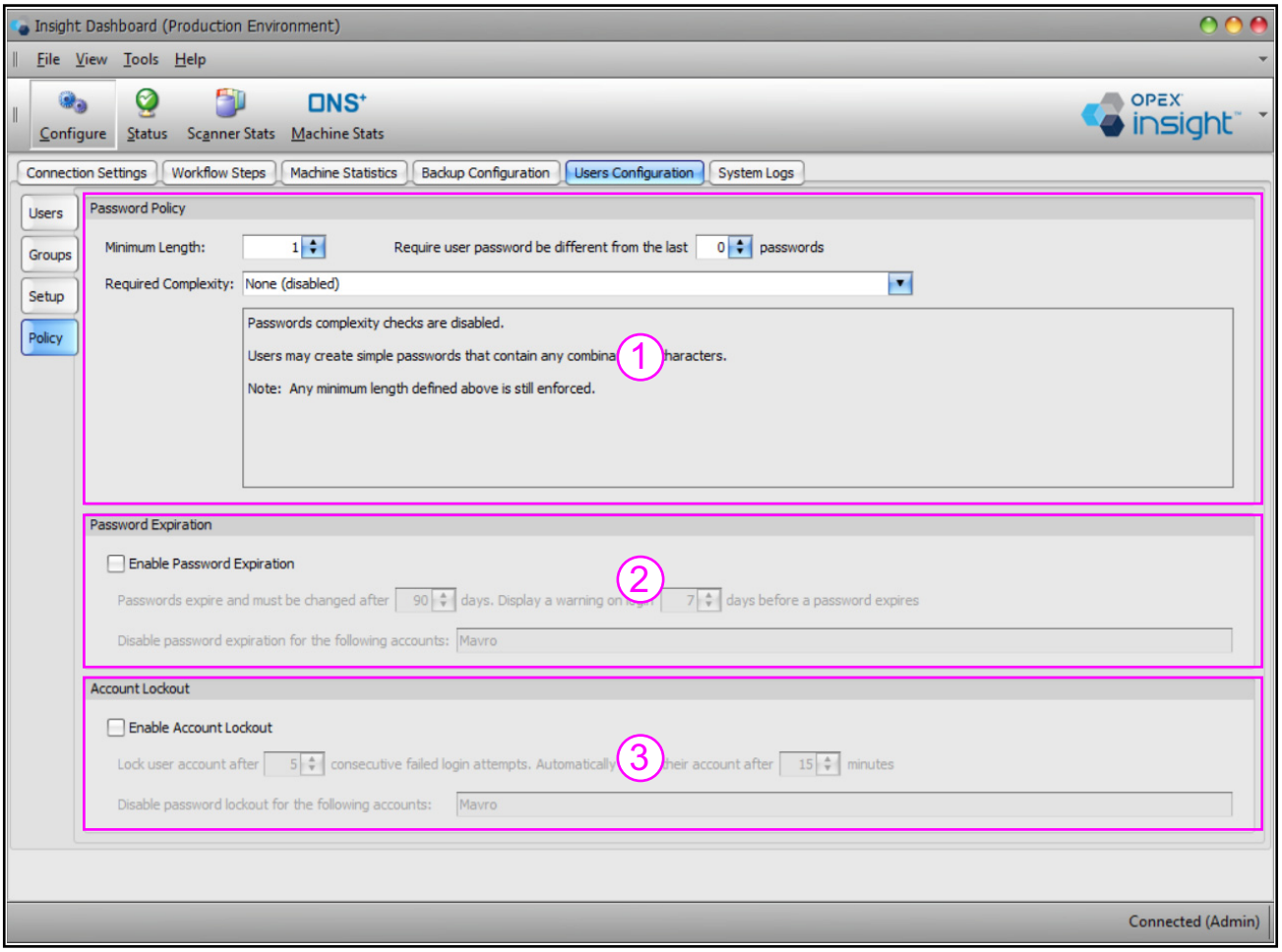

Figure 2-36: Three sections of the Policy display.

2.6.1.1. Password Policy

This section of the dialog determines what kinds of passwords a user may have.

1. At **Minimum Length**, configure the minimum character length of a password (Figure 2-37).
2. Configure how many recent passwords the new password must differ from (Figure 2-37).

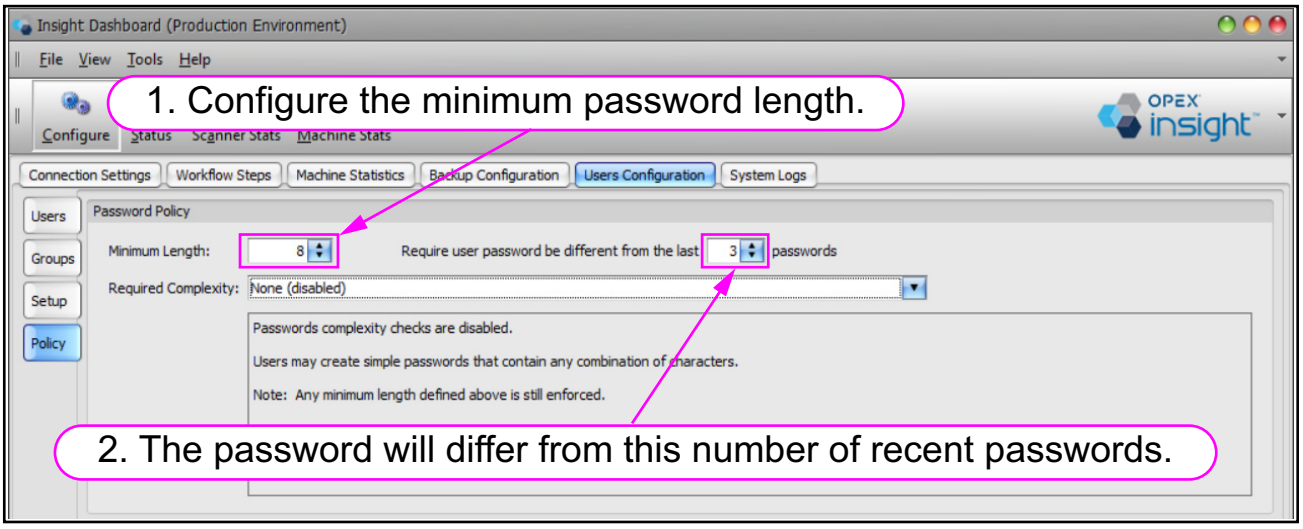

Figure 2-37: Beginning to configure the password.

3. At **Required Complexity**, select the complexity of the password:
   a. Select **None** for no required complexity (Figure 2-38).

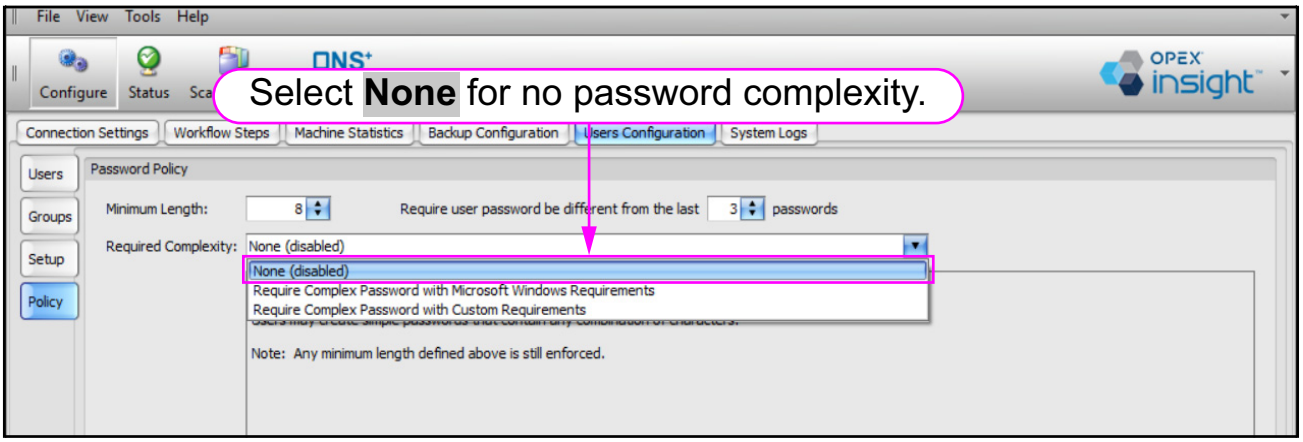

Figure 2-38: Selecting to have no password complexity.

b. To have the same password complexity as Microsoft Windows, select **`Require Complex Password with Microsoft Windows Requirements`** (Figure 2-39).

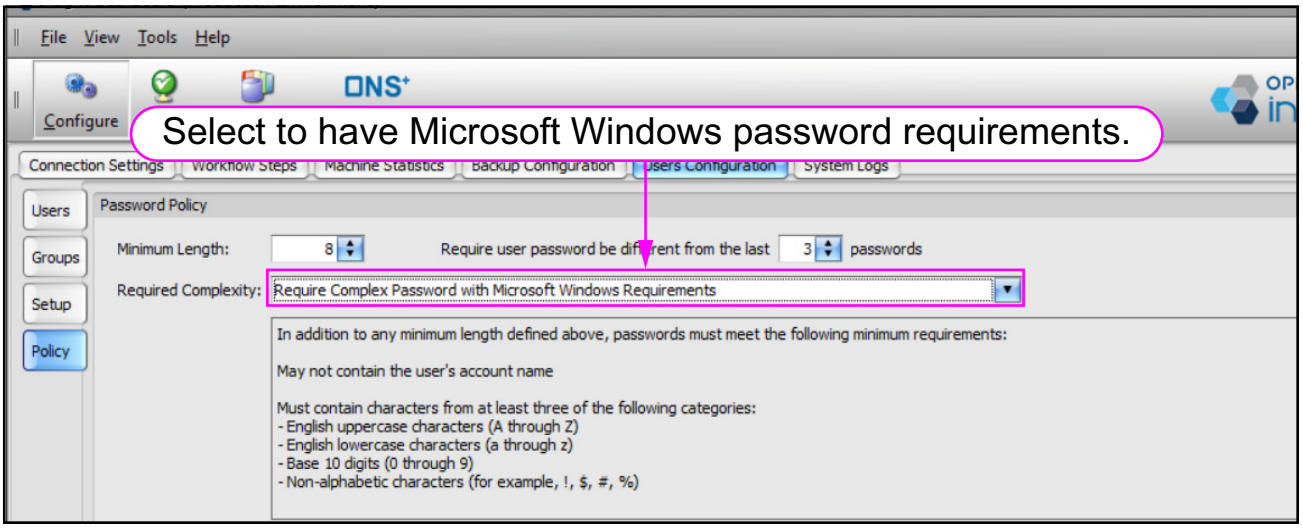

Figure 2-39: Selecting Microsoft Windows requirements.

c. To customize password requirements, select **`Require Complex Password with Custom Requirements`**. Check the boxes for the desired requirements (Figure 2-40).

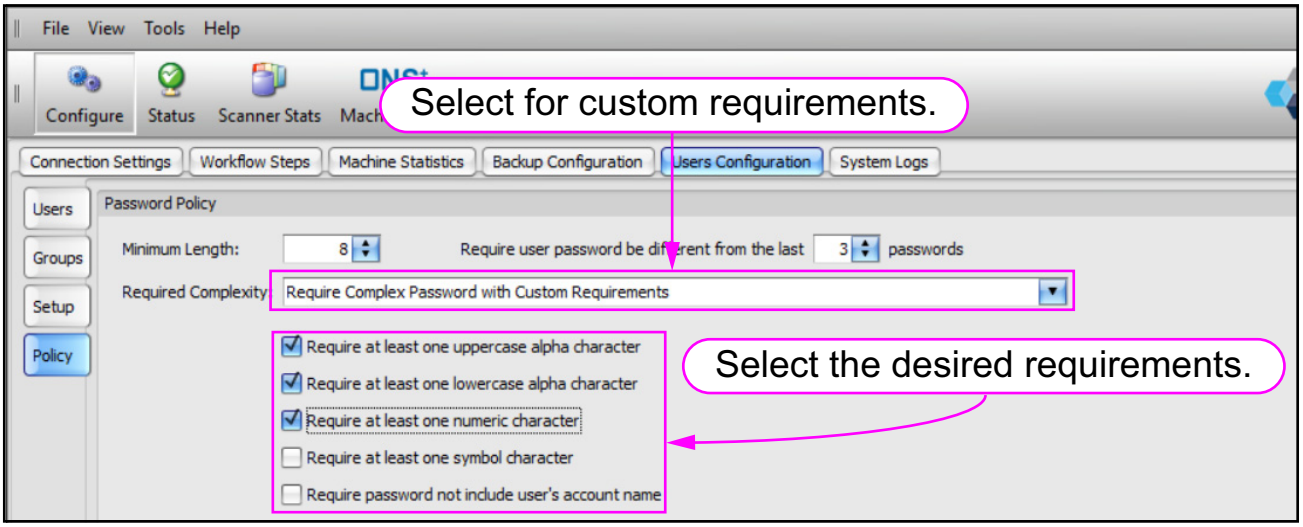

Figure 2-40: Customizing password requirements.

2.6.1.2. Password Expiration

1. To enable password expiration, go to the **Password Expiration** area. Check the box near "**Enable Password Expiration** (Figure 2-41).
2. After **Passwords Expire and must be changed after**, use the arrows to choose how many days pass before the password expires (Figure 2-41).
3. Use the arrows to choose how many days before expiration to display the warning (Figure 2-41).

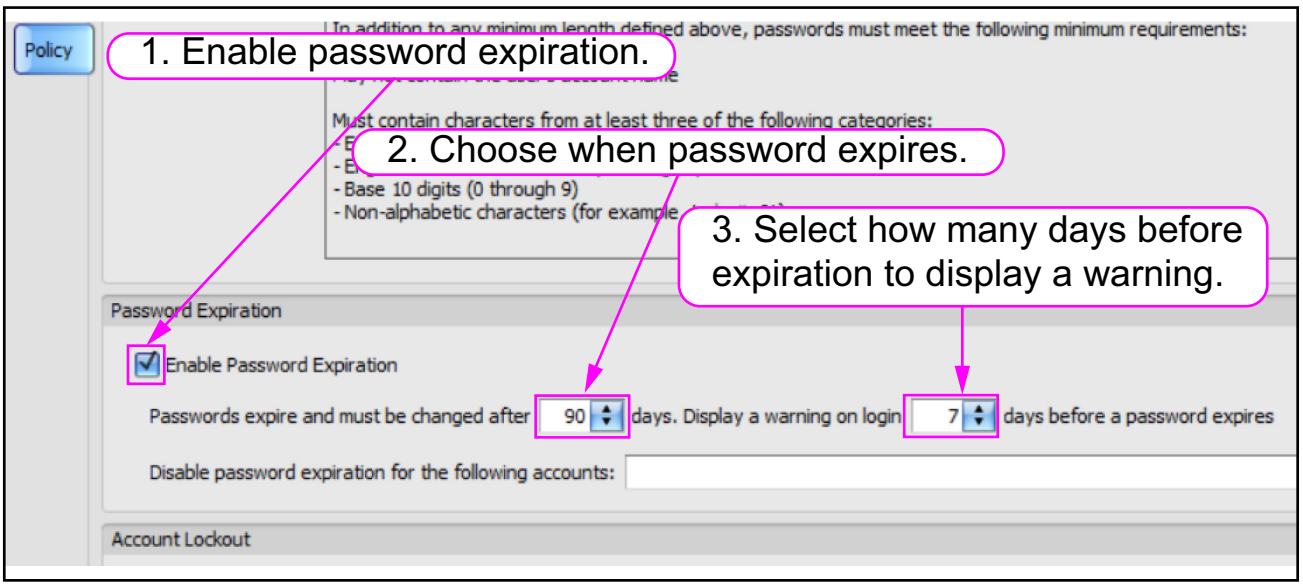

Figure 2-41: Enabling password expiration.

4. Enter account names for which you want password expiration to be disabled (Figure 2-42).

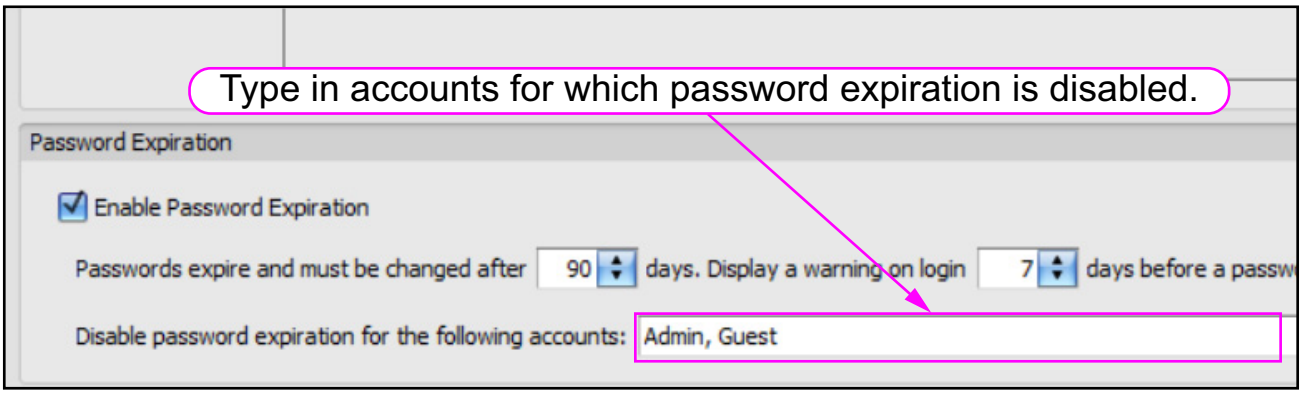

Figure 2-42: Disabling password expiration for certain accounts.

2.6.1.3. Account Lockout

1. Check the box next to **Enable Account Lockout** to enable account lockout after several consecutive failed log-in attempts (Figure 2-43).
2. Choose how many consecutive failed login attempts trigger account lockout.
3. Choose how many minutes later the account is unlocked.

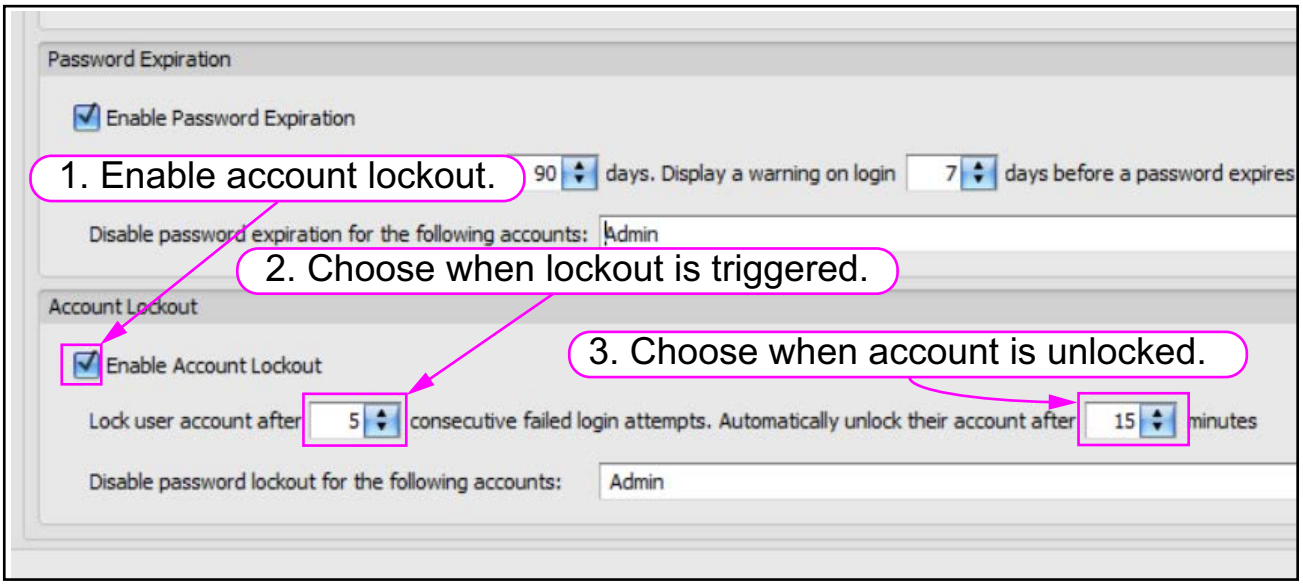

Figure 2-43: Enabling account lockout.

4. Enter names of accounts for which you want account lockout to be disabled (Figure 2-44).

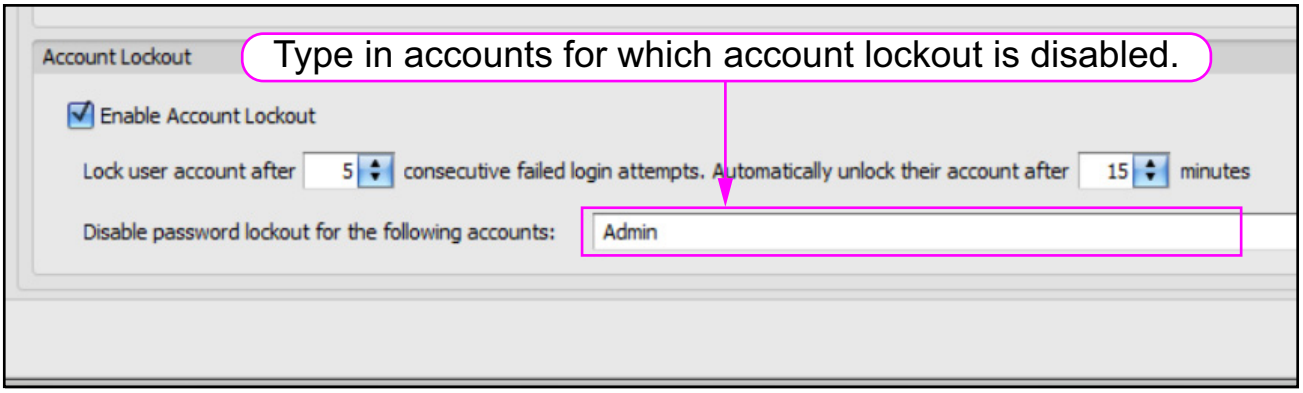

Figure 2-44: Disabling account lockout for certain accounts.

2.6.2. Groups

Groups and policies provide a convenient way to define the level of access that each user has to the Insight Dashboard functions.

A **group** refers to a group of users (Managers, Supervisors, administrators, etc.) (Figure 2-45).

A **policy** defines which Insight Dashboard features a group has access to (Figure 2-45).

Note: *In the context of groups and policies, don't confuse policy here with a password policy.*

A policy is assigned to one or more groups. Once you have defined your policy and assigned it to one or more groups, you can assign users to the groups, and the users will inherit all of the policy settings associated with the assigned groups. This approach allows for a "Role-based" security model.

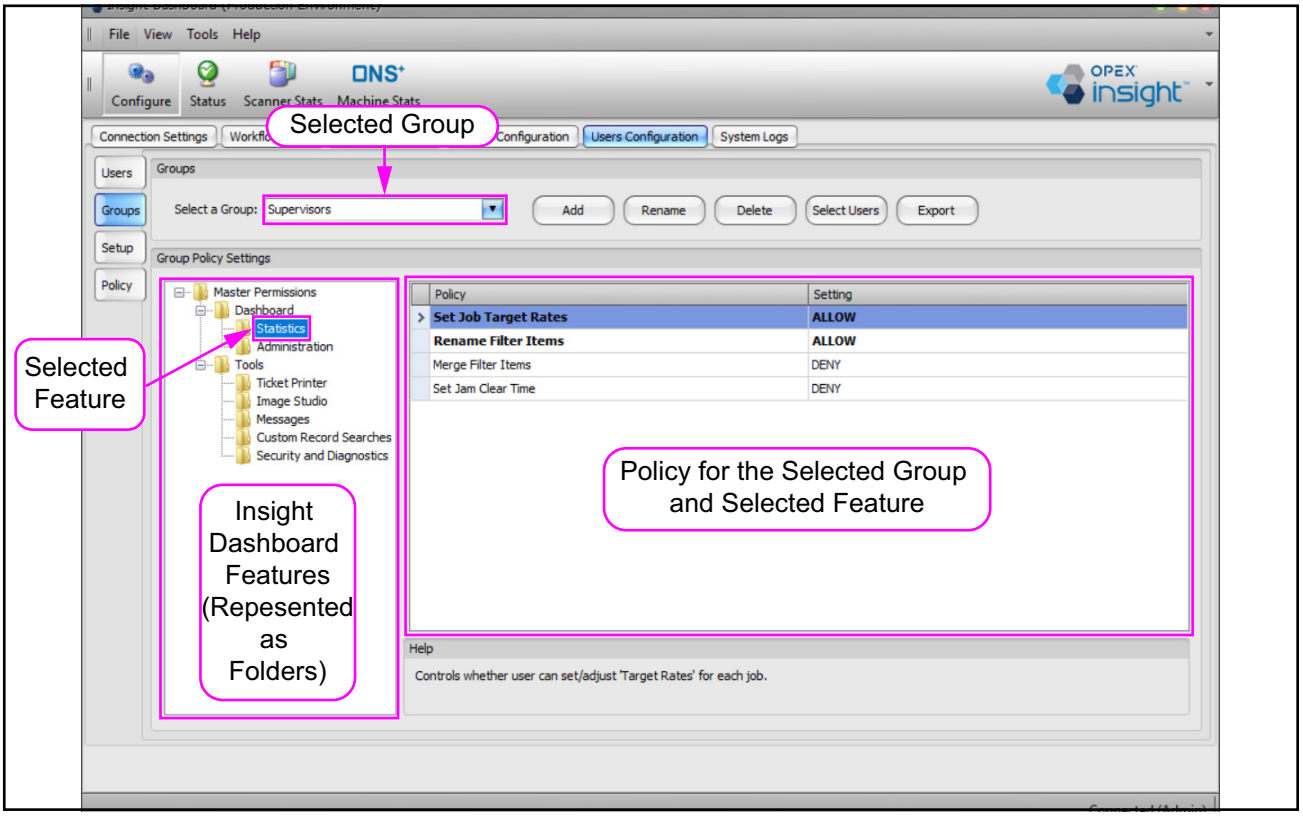

Figure 2-45: Overview of groups.

2.6.2.1. Adding a New Group

1. Click on the **Groups** button (Figure 2-46).
2. Click on the **Add** button.
3. Enter the group name.
4. Choose a template from which to copy group policy (Figure 2-46). Each template is based on an existing group. If no group seems suitable, select **<Create Default Group>**.

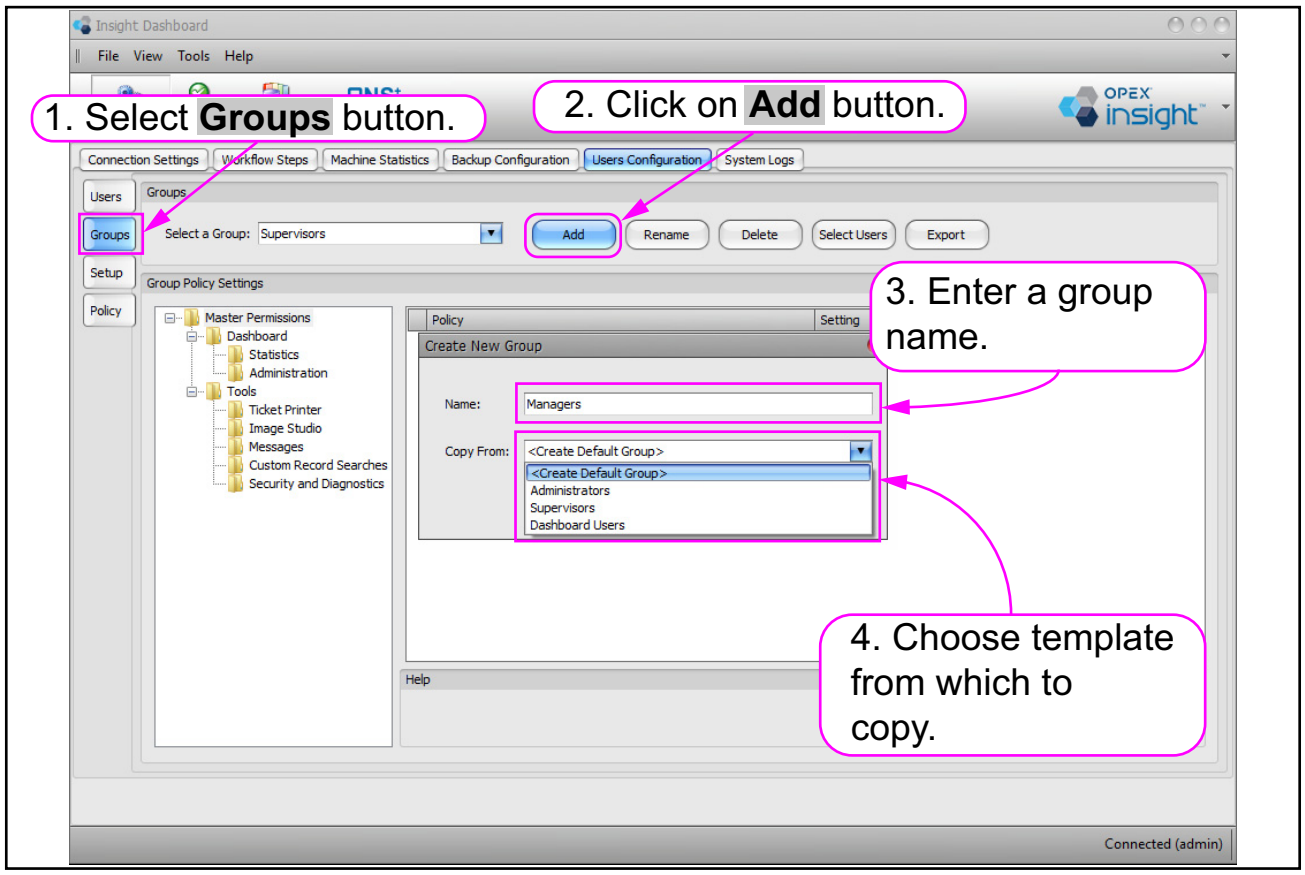

Figure 2-46: Adding a Group.

2.6.2.2. Creating a Group's Policy

1. Select a group from the group drop-down box (Figure 2-47).
2. Click on a feature.
3. In the panel at the right, in the "Setting" column, right-click and choose either `ALLOW`, `DENY`, or `<Restore Default>`.
4. Repeat steps 2 and 3 for all the features.

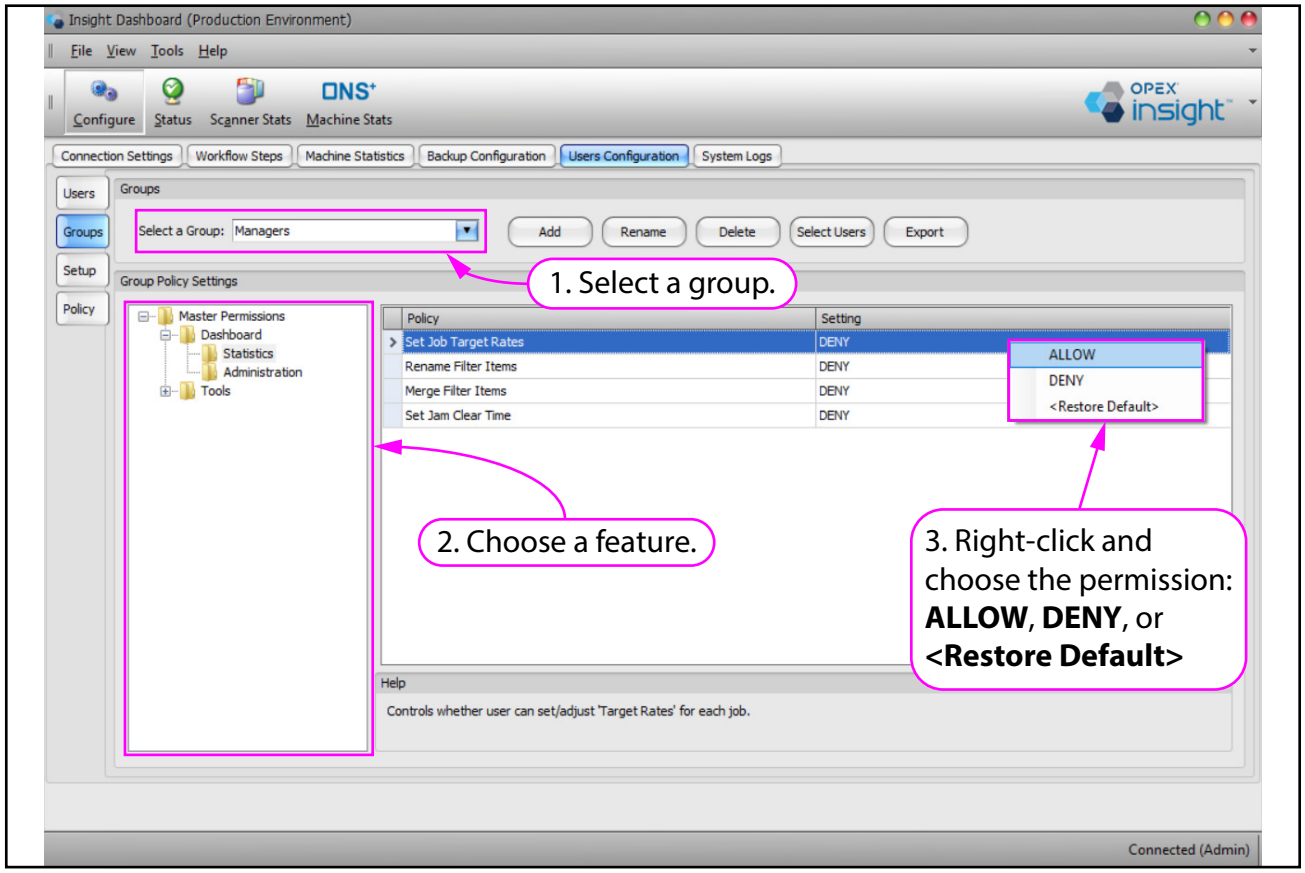

Figure 2-47: Creating a group policy.

Note: *In the left column, all the features under* **Tools** *are for developer use only.*

2.6.2.3. Renaming a Group

1. Select a group (Figure 2-48).
2. Click **Rename**. A **Rename Group** window opens.
3. Rename the group.
4. Click on the **Save** button. The **Rename Group** window closes and the group is renamed.

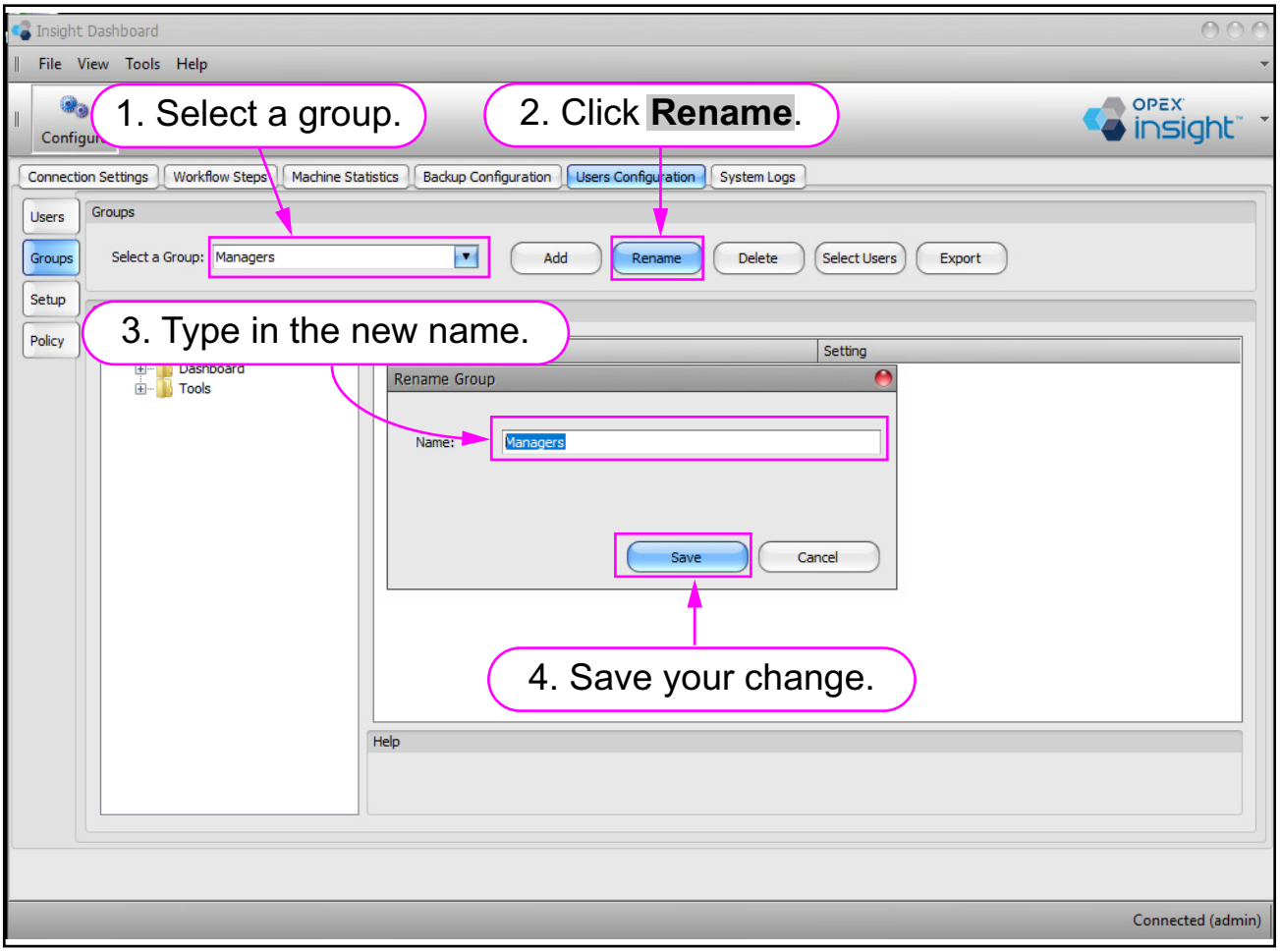

Figure 2-48: Renaming a Group.

2.6.2.4. Deleting a Group

1. Select a group to delete (Figure 2-49).
2. Click the **Delete** button. A confirmation window opens.
3. Click the **Yes** button to confirm. The confirmation windows closes.

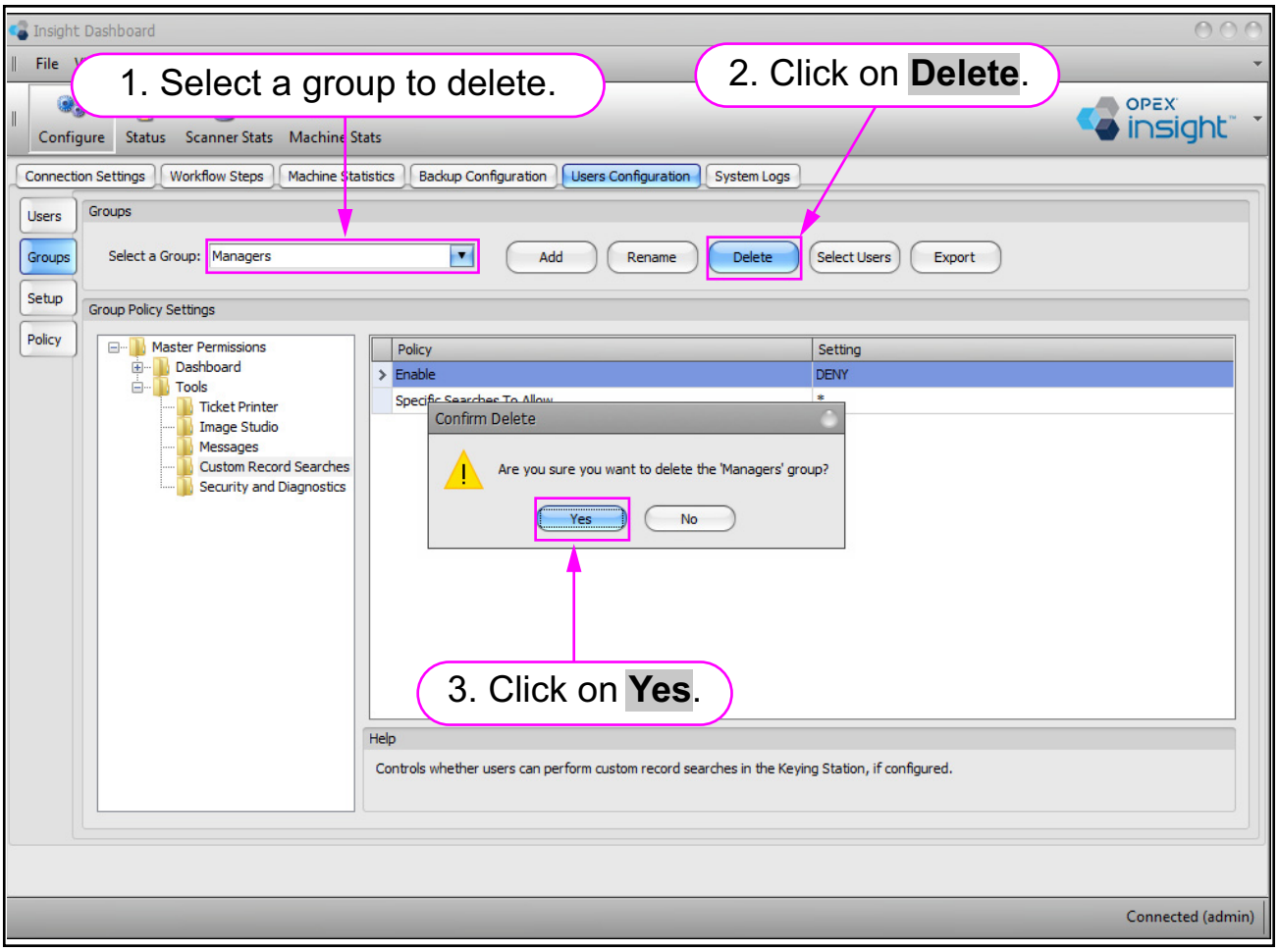

Figure 2-49: Deleting a group.

2.6.2.5. Assigning Users to a Group

1. Select a group (Figure 2-50).
2. Click the **`Select Users`** button. An **Assign Groups** window opens that displays a list of users, with a check-box next to each user name.
3. Check all users that you want to assign to this group.
4. Click on **`Apply`** to save the changes. The **Assign Groups** window closes.

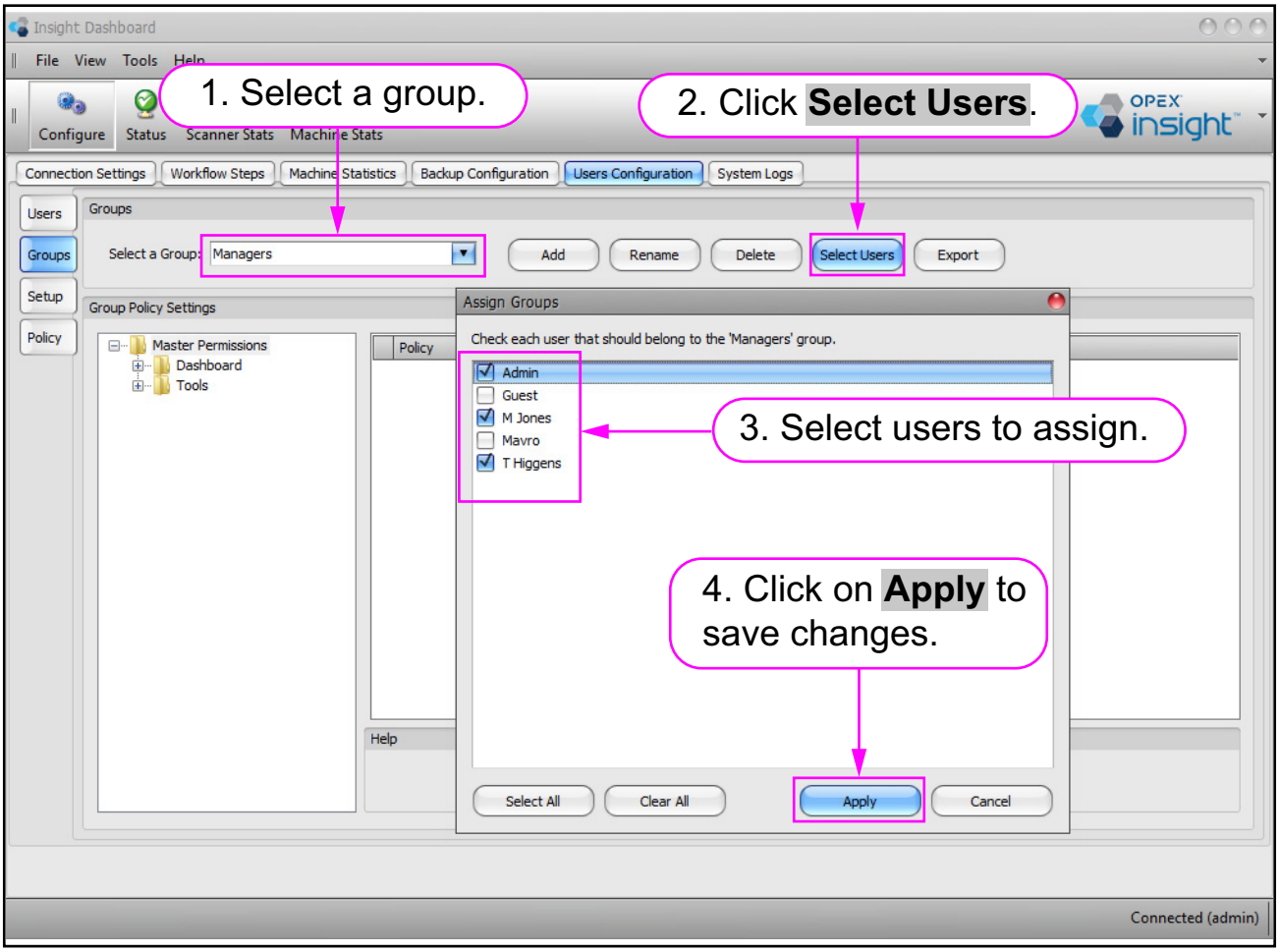

Figure 2-50: Assigning Users to a Group.

2.6.2.6. Exporting a Group

Insight allows you to export the settings for a group into a CSV file.

1. Select a group (Figure 2-51).
2. Click on the **Export** button. This opens an **Export Group Configuration** window.
3. Select a folder to which to save the CSV file.
4. Type in a file name.
5. Click **Save** to complete the export. The **Export Group Configuration** window closes.

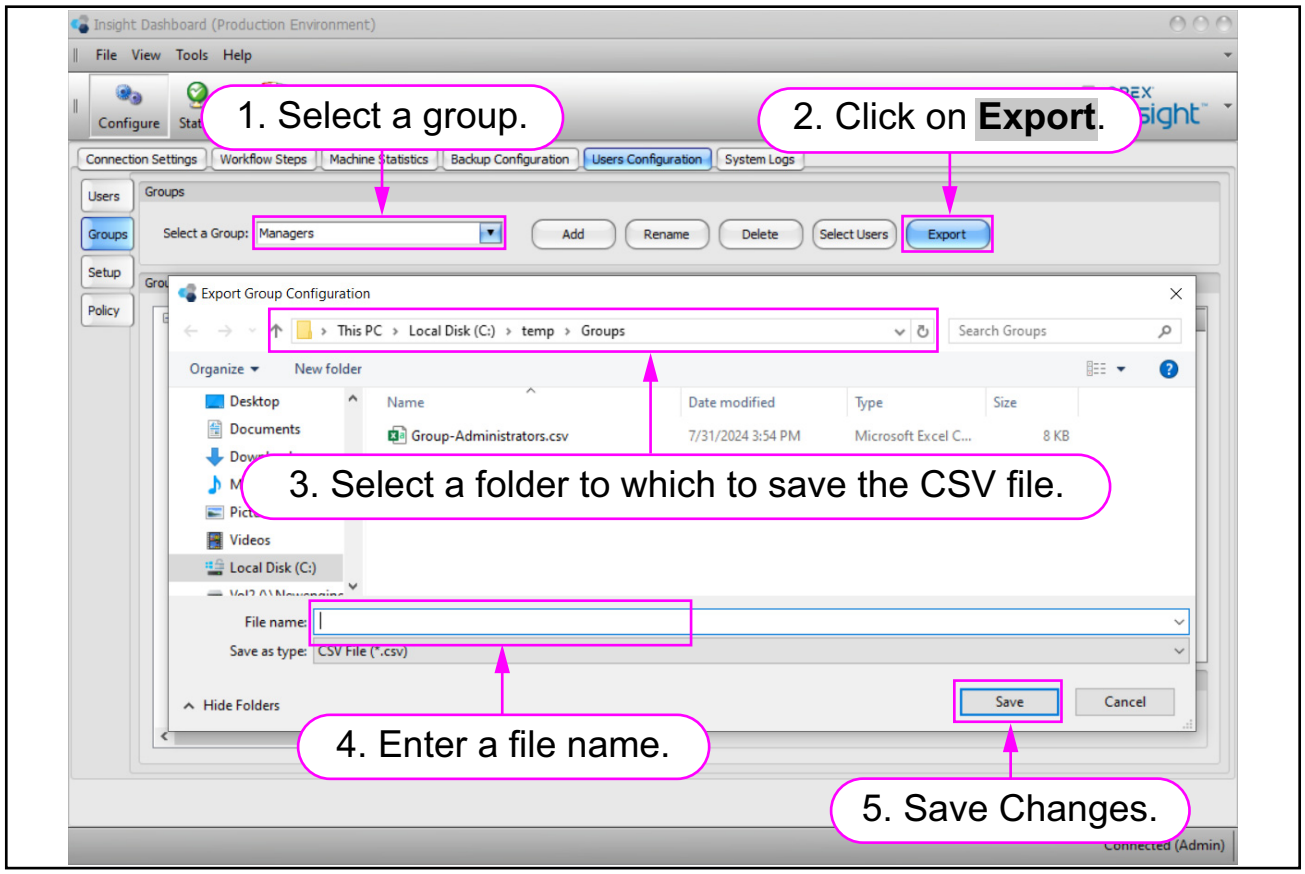

Figure 2-51: Exporting a group.

2.6.3. Users

The **User** display is divided into five sections (Figure 2-52):

1. User List
2. User Name and Status
3. Group Membership
4. Comments
5. User Configuration Tools

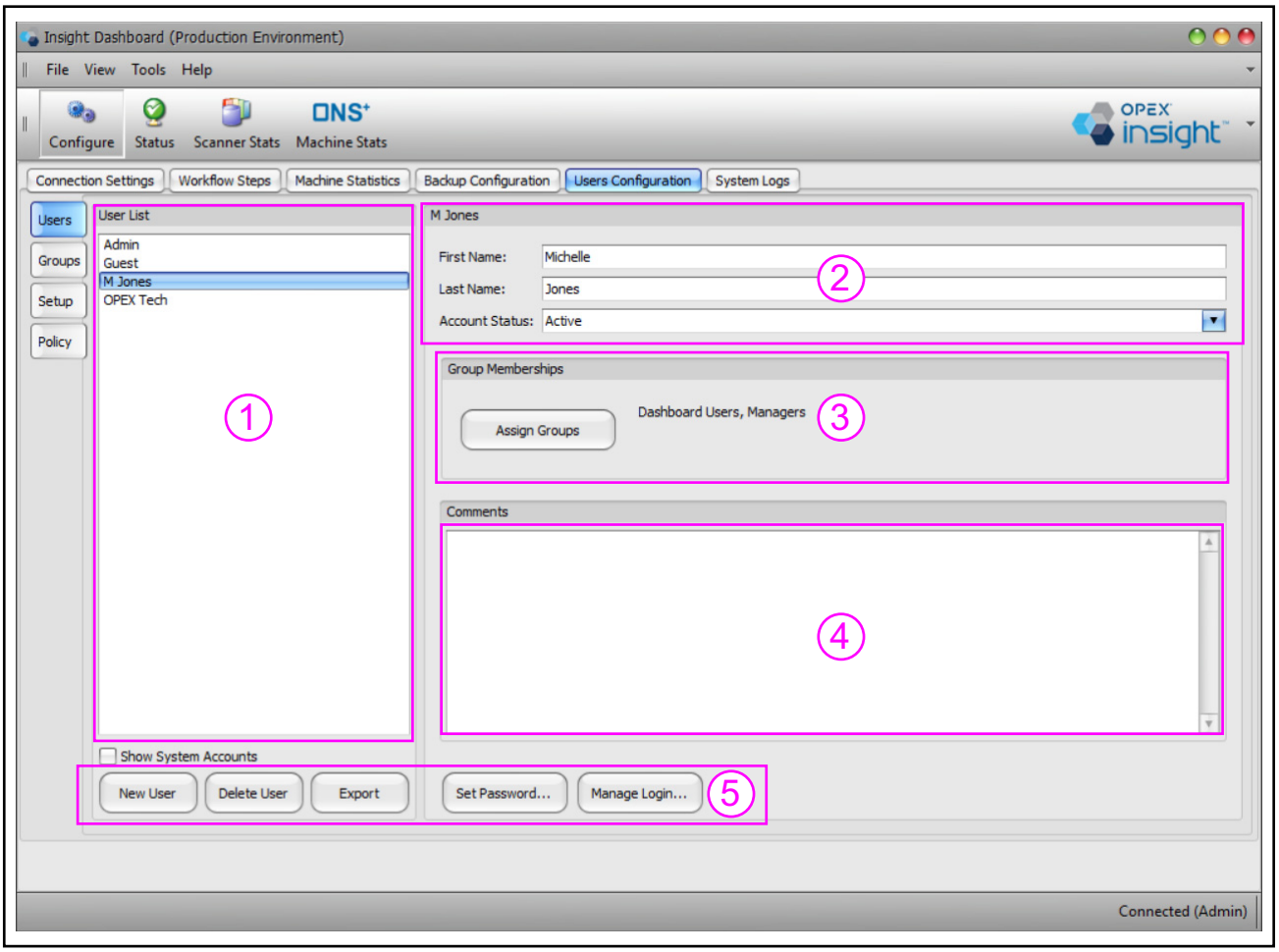

Figure 2-52: Users Tab Layout.

2.6.3.1. Adding a User

1. Click `Users` (Figure 2-53).
2. Click the `New User` button at the bottom. The **Create New User** window appears.
3. Enter the user name and password in the appropriate fields.

Details to note regarding Insight passwords:

- For security purposes, password characters entered are hidden.
- The format of the password you enter must adhere to your current password policy settings.
- The password you entered in the **Password** field and in the **Confirm Password** field must match exactly. If not, you will see a “passwords do not match” message.
- When a user enters a user name and password to log into Insight Dashboard, the user name is not case sensitive but the password is case sensitive.

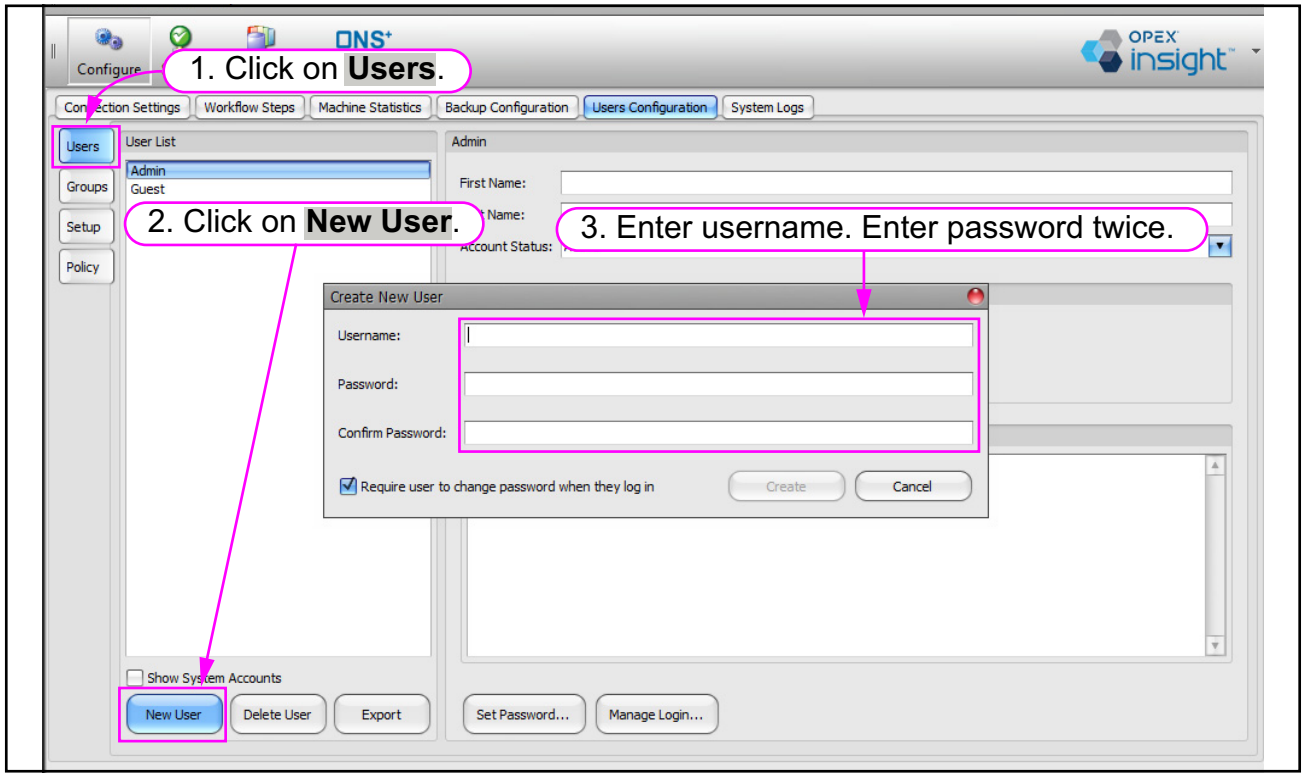

Figure 2-53: Adding a User.

4. Check the box next to **Require user to change password when they log in** (Figure 2-54).
5. Click the **Create** button. This closes the **Create New User** window.

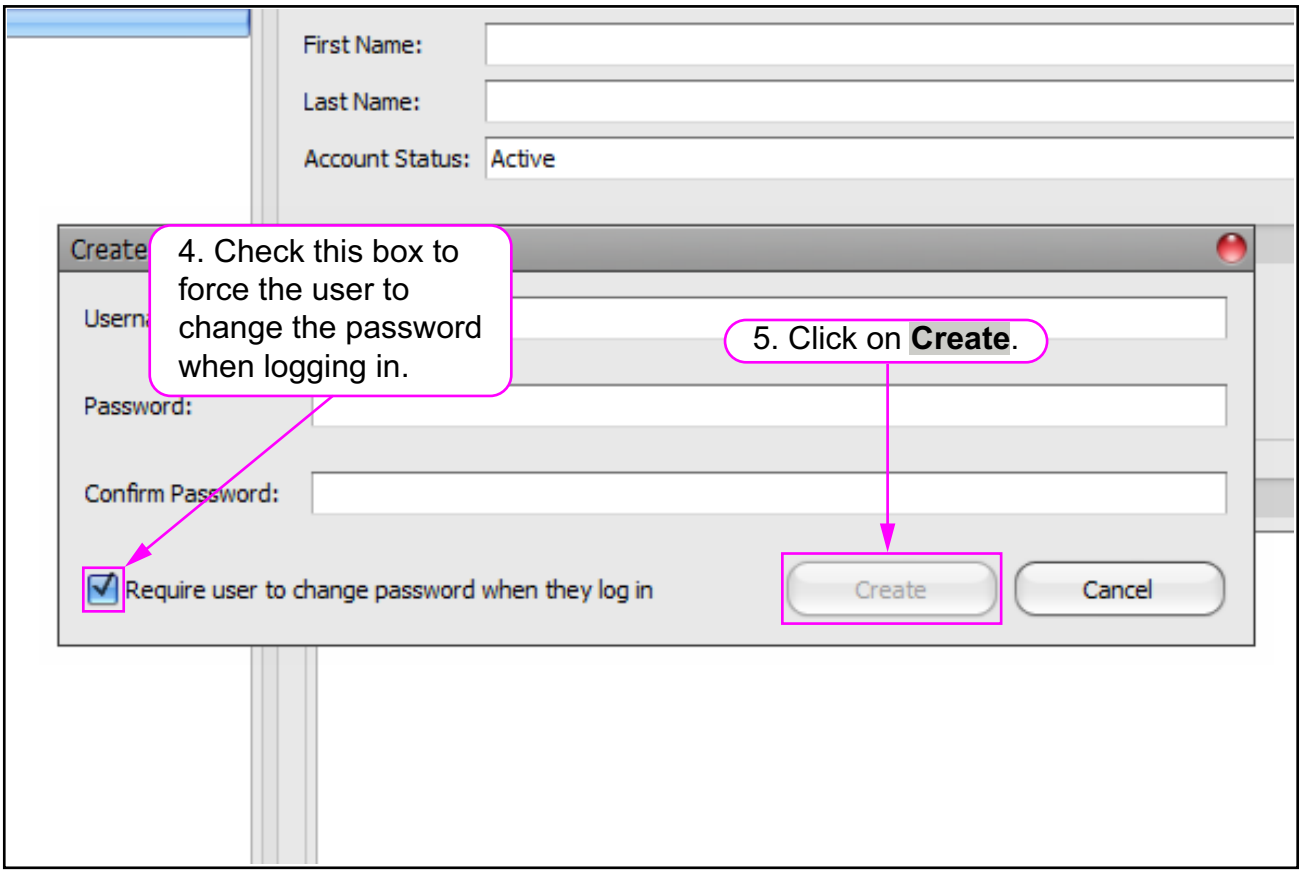

Figure 2-54: Requiring the user to change the password.

2.6.3.2. Editing a New User

1. Click on a new user's name in the **User List** area (Figure 2-55).
2. If desired, enter a full first name and last name for the user in the **First Name** and **Last Name** fields.
3. Use the **Account Status** field to set the user's status to `Active` or `Account Disabled`. When the user's account is set to `Active`, the user can log in normally. When the user's account is set to `Account Disabled`, the user will not be able to log in.

   Note: *Using the Account Disabled setting is a convenient way to temporarily block a user's access without deleting the user's account.*
4. Optionally, enter additional information about the user in the **Comments** field.

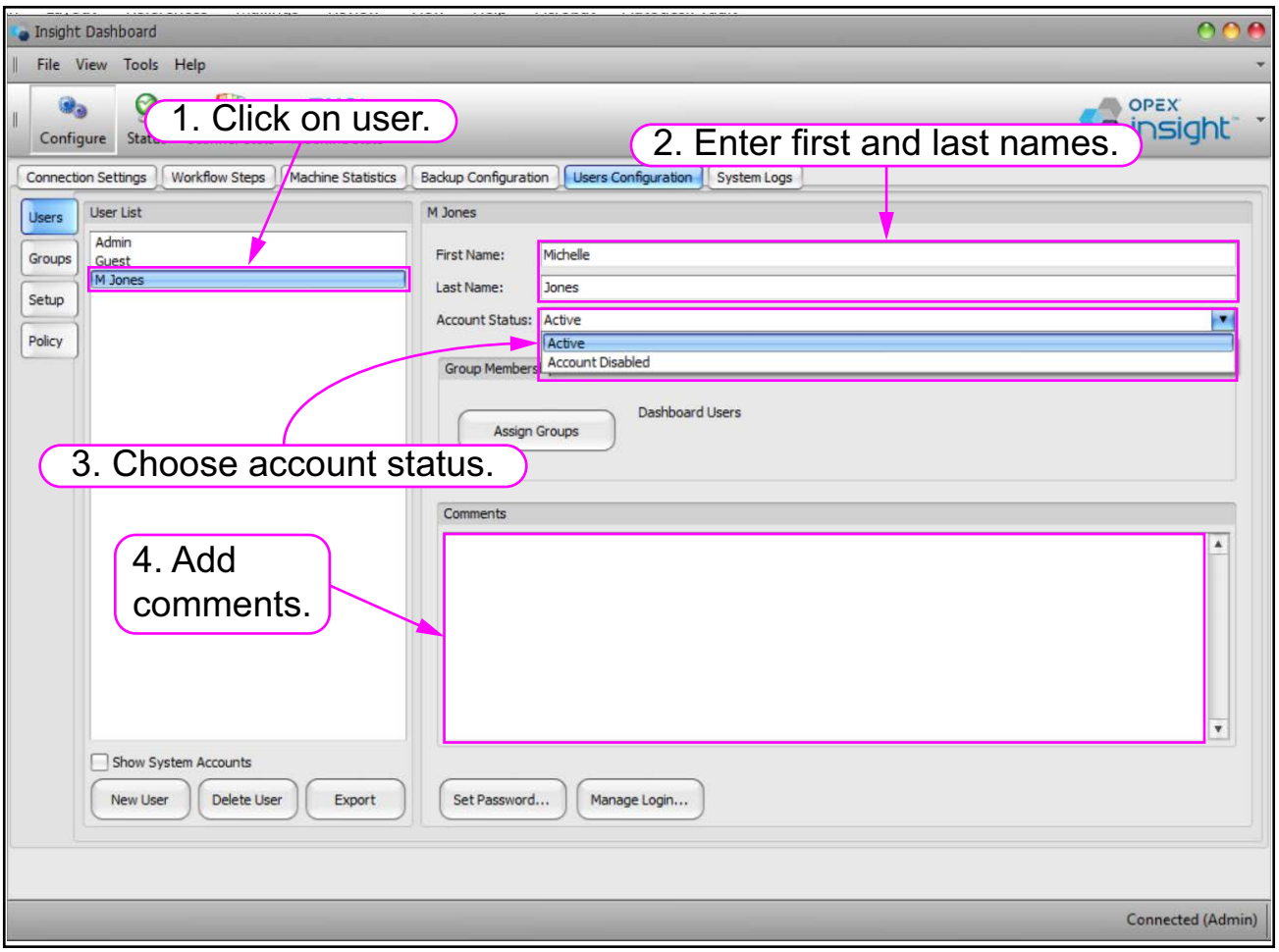

Figure 2-55: Editing the User Detail.

2.6.3.3. Assigning a User to Groups

In addition to using the **Groups** tab to assign a user to groups, you can also use the **Users** tab to assign a user to groups.

1. Click the `Assign Groups` button (Figure 2-56).

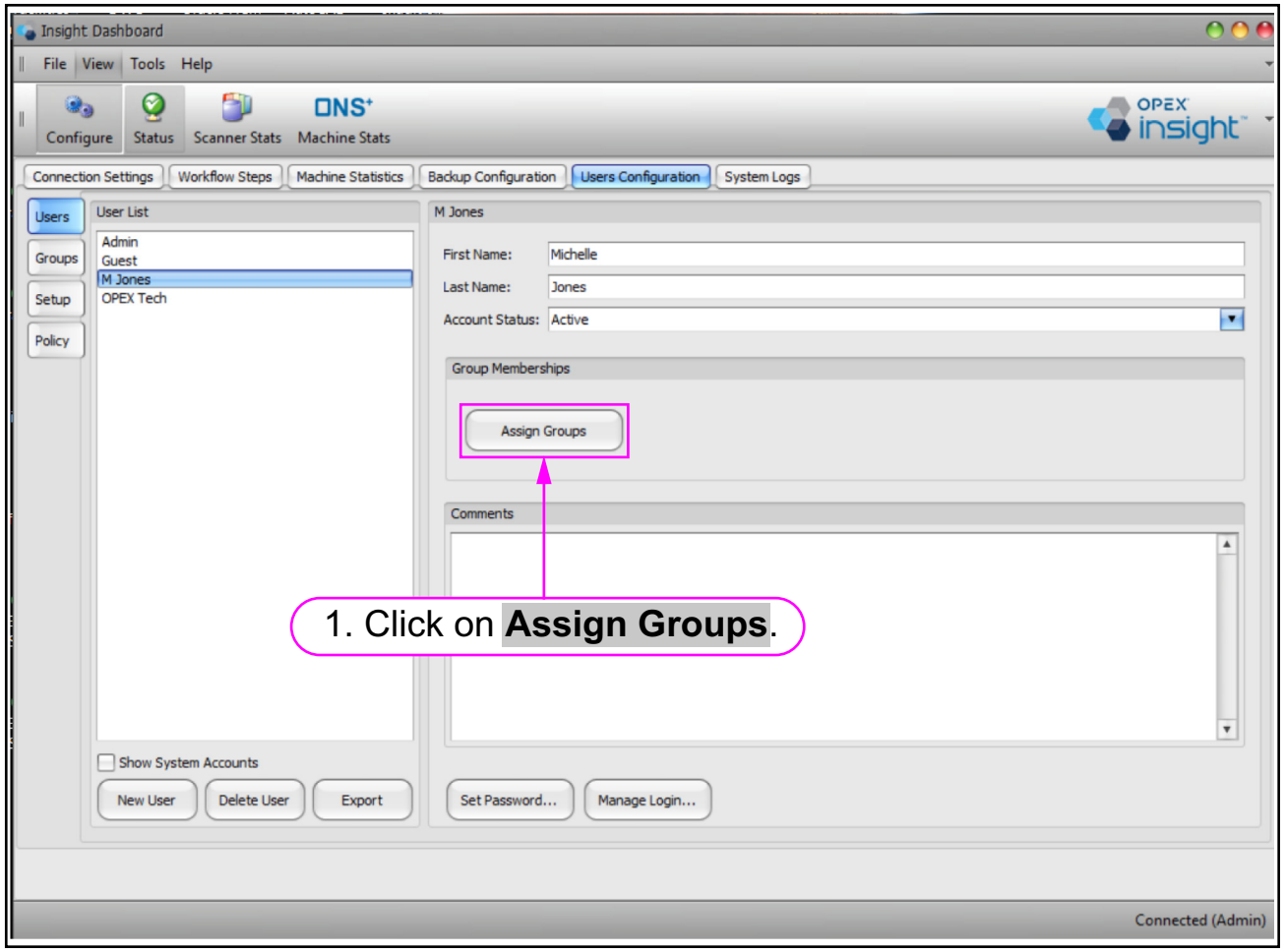

Figure 2-56: Clicking on `Assign Groups`.

2. The **Assign Groups** window opens. Assign groups to the user by checking the boxes beside the groups. Uncheck all other groups (Figure 2-57).
3. Click the **Apply** button (Figure 2-57). The **Assign Groups** window closes. The groups assigned to the User will now appear next to the **Assign Groups** button (Figure 2-58).

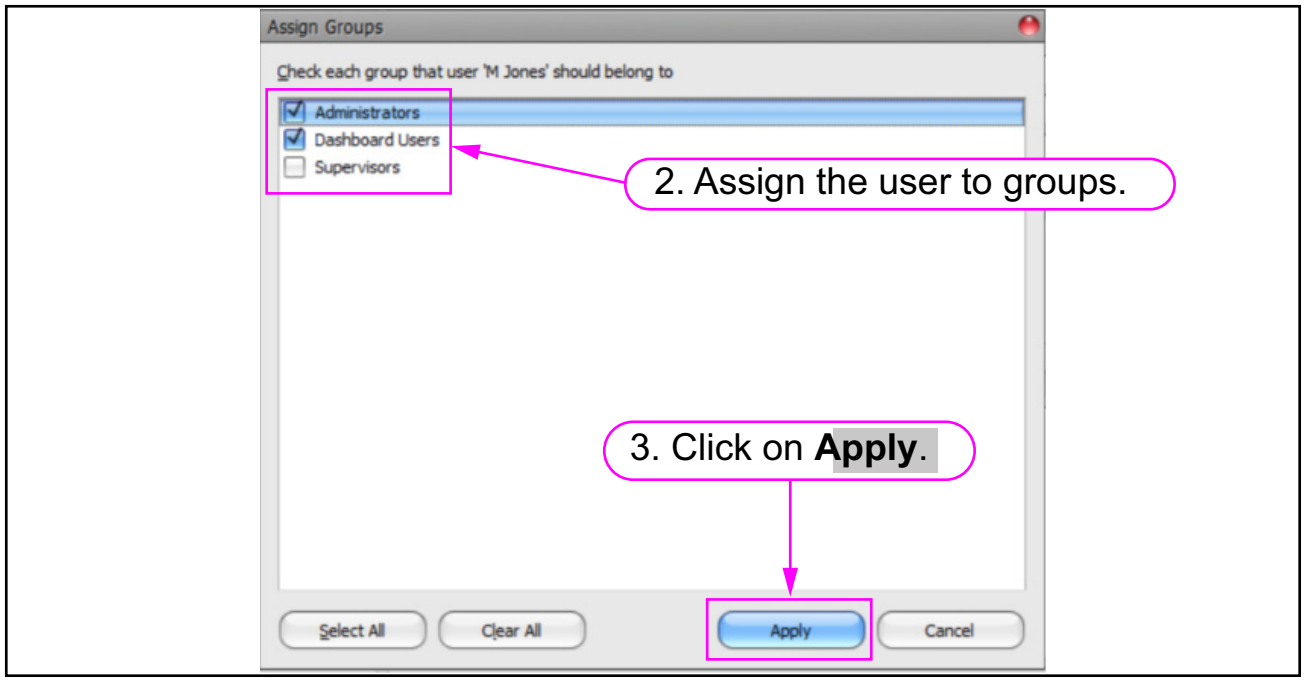

Figure 2-57: Assigning groups.

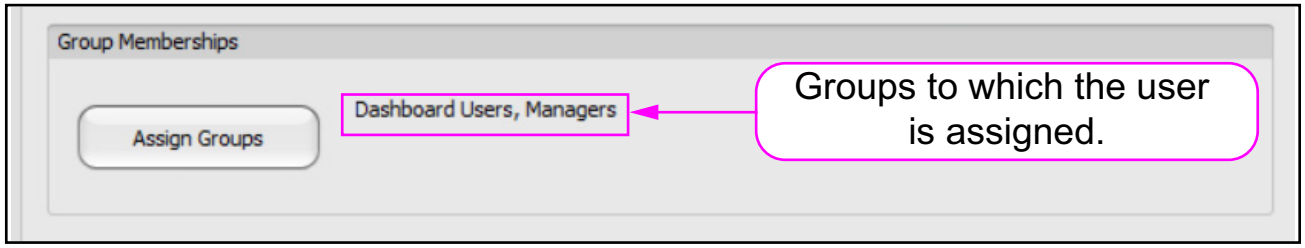

Figure 2-58: The list of the user's groups.

2.6.3.4. Deleting a User

1. Click **Users** on the left (Figure 2-59).
2. Click the user's name.
3. Click **Delete User** (Figure 2-59). A **Confirm Delete** window appears (Figure 2-60).

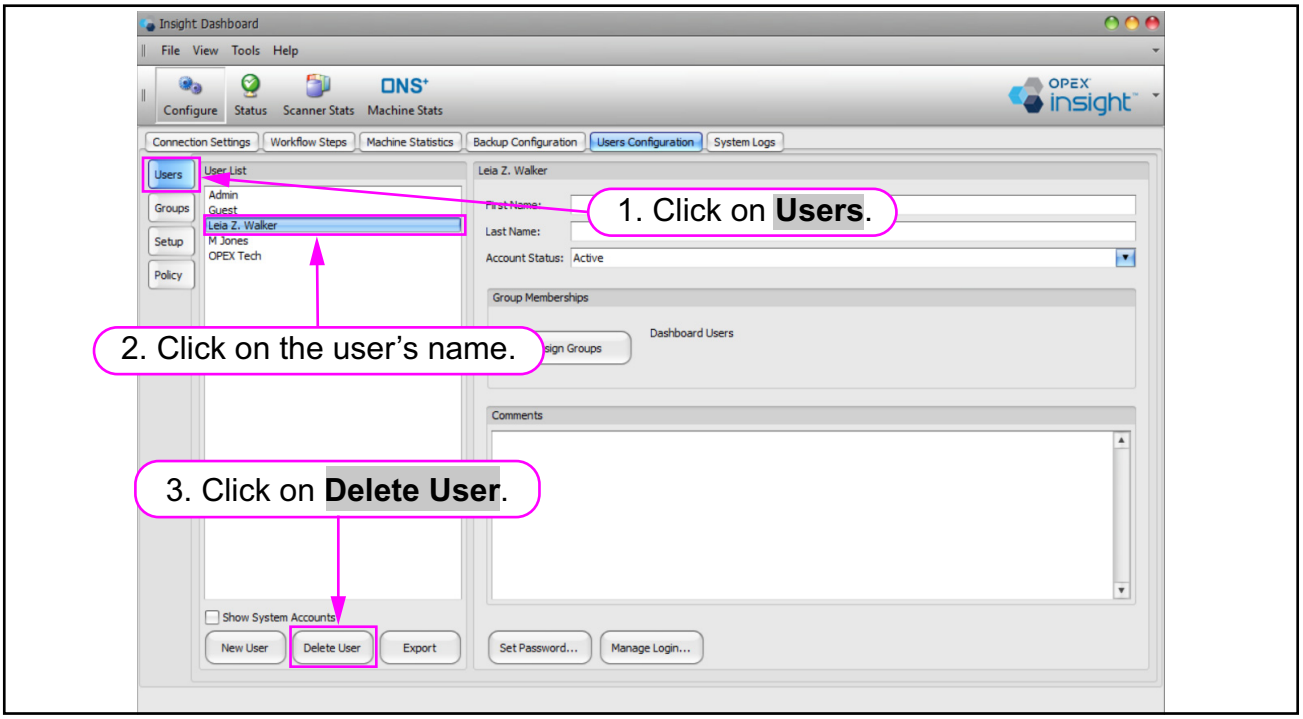

Figure 2-59: Deleting a user.

4. Click **Yes** to delete the user and close the **Confirm Delete** window (Figure 2-60).

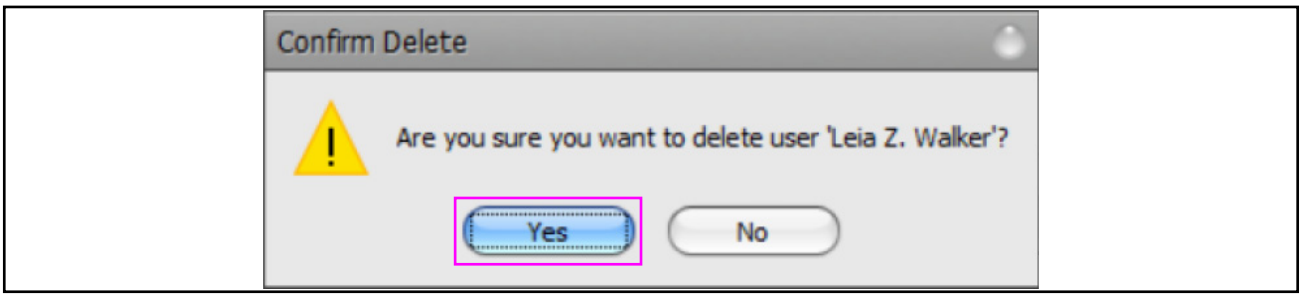

Figure 2-60: Confirm Delete Window.

2.6.3.5. Exporting User Information

You can export a file in CSV format that contains the basic information for each user, including: user name, first name, last name, status, comments, and group assignments.

1. Click on the **Users** tab (Figure 2-61).
2. Click on the user's name.
3. Click the **Export** button.

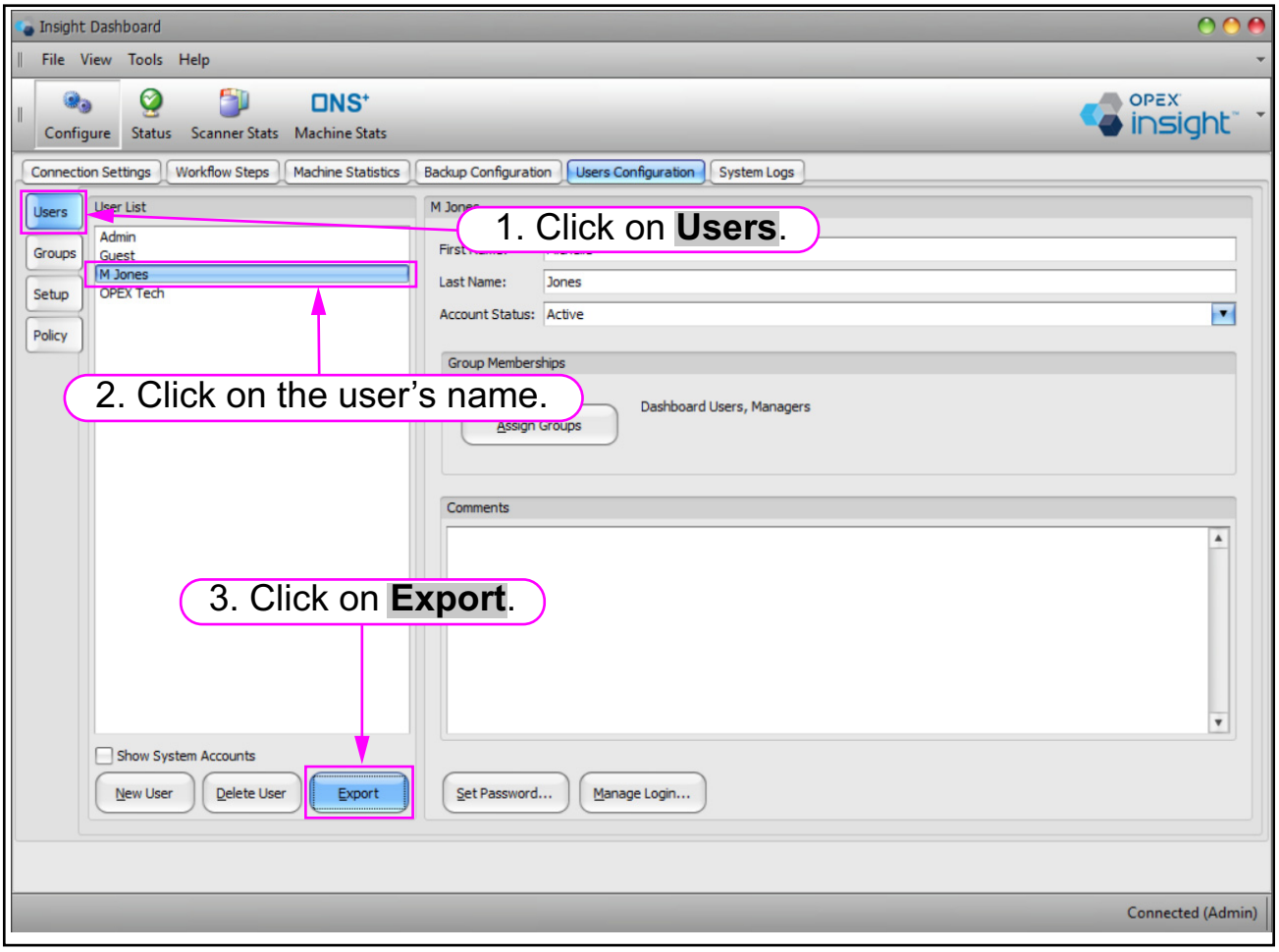

Figure 2-61: Exporting user information.

4. An **Export Users** window opens. In the **Export Users** window, select the location for the file (Figure 2-62).
5. Enter a file name.
6. Click **Save** to export the file (Figure 2-62). The **Export Users** window closes and an **Export Complete** message window is displayed (Figure 2-63).
7. Click on the **OK** button to close the **Export Complete** message window.

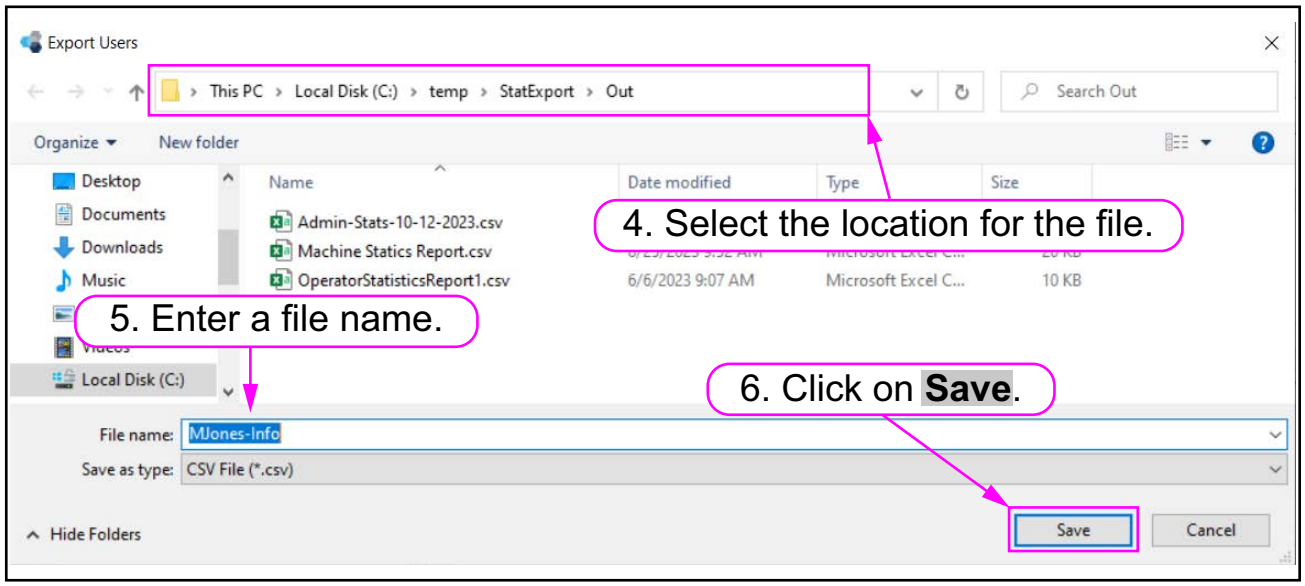

Figure 2-62: Selecting the location for the file.

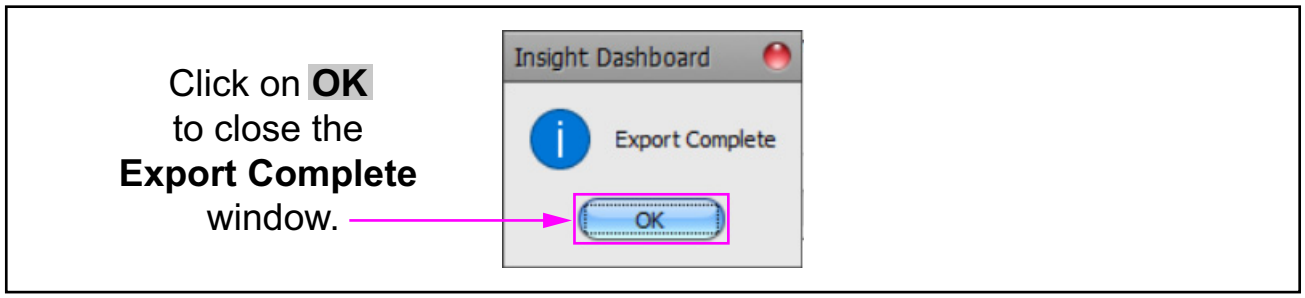

Figure 2-63: Closing the Export Complete window.

2.6.3.6. Changing a User's Password.

1. Click the **Users** button (Figure 2-64).
2. Click on the user's name in the **User List** area.
3. Click the **Set Password** button.

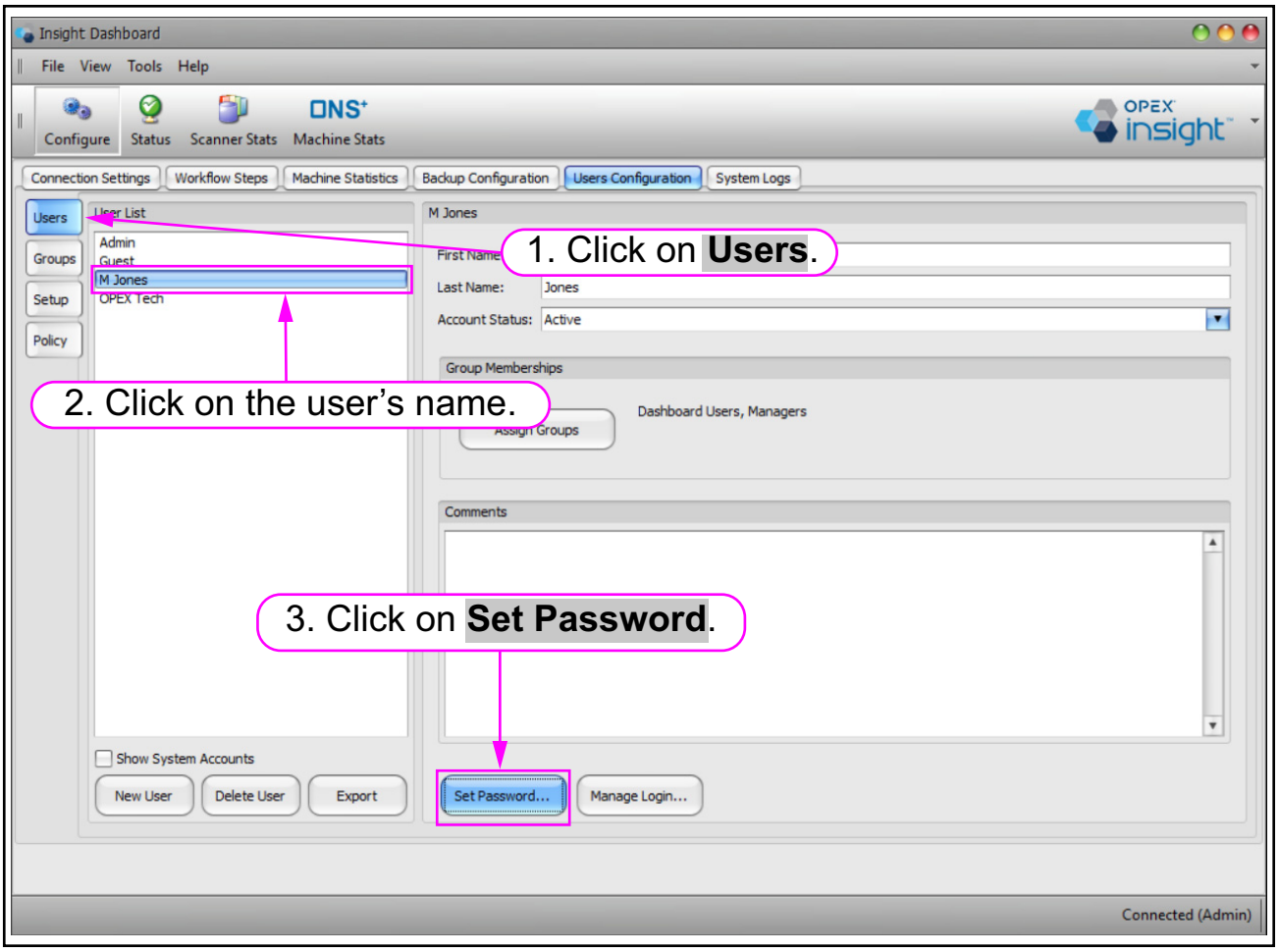

Figure 2-64: Changing a user's password.

4. The **Set User Password** window opens (Figure 2-65). In the **Set User Password** window, enter the new password in the **Password** and the **Confirm Password** fields.

Details to note regarding Insight passwords:

- For security purposes, password characters entered are hidden.
- The format of the password you enter must adhere to your current password policy settings.
- The password you entered in the **Password** field and in the **Confirm Password** field must match exactly. If not, you will see a “passwords do not match” message.
- When a user enters a user name and password to log into Insight Dashboard, the user name is not case sensitive but the password is case sensitive.

5. To force the user to change the password upon logging in, check the box labeled “**Require user to change password when they log in**.”
6. Click the **Save** button. The **Set User Password** window closes.

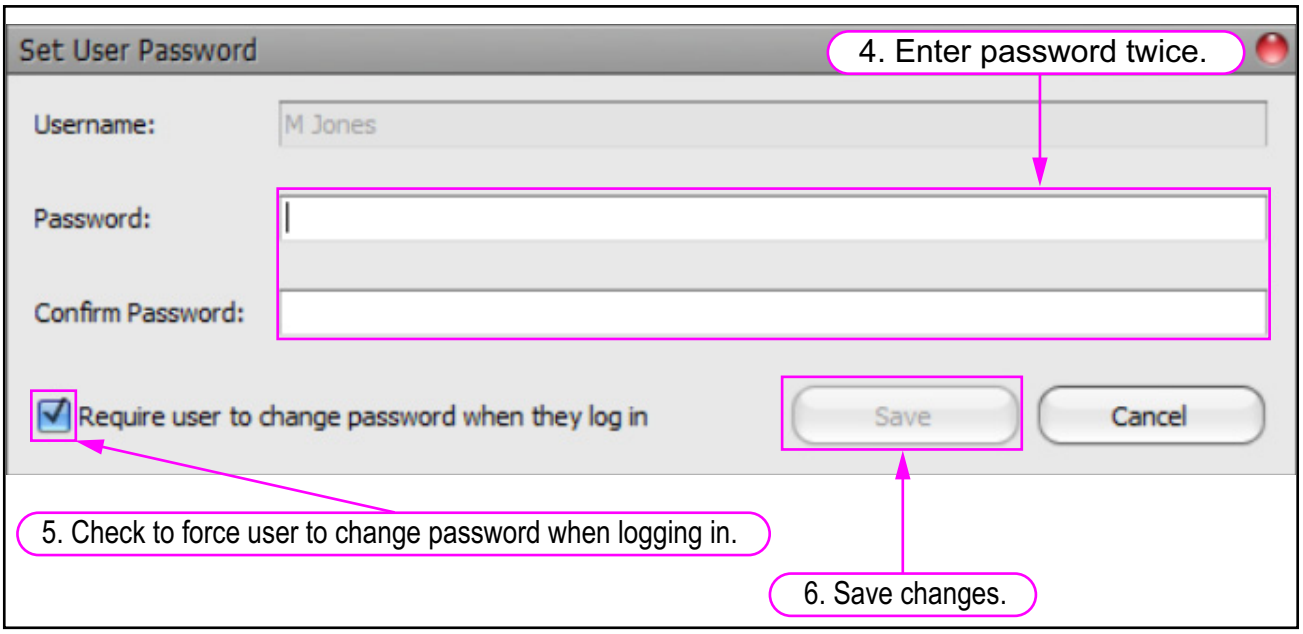

Figure 2-65: Set Password Window.

2.6.3.7. Managing a User's Login

1. Under **User List**, select a user.
2. Click `Manage Login...` (Figure 2-66). The **Manage Login** window is displayed.

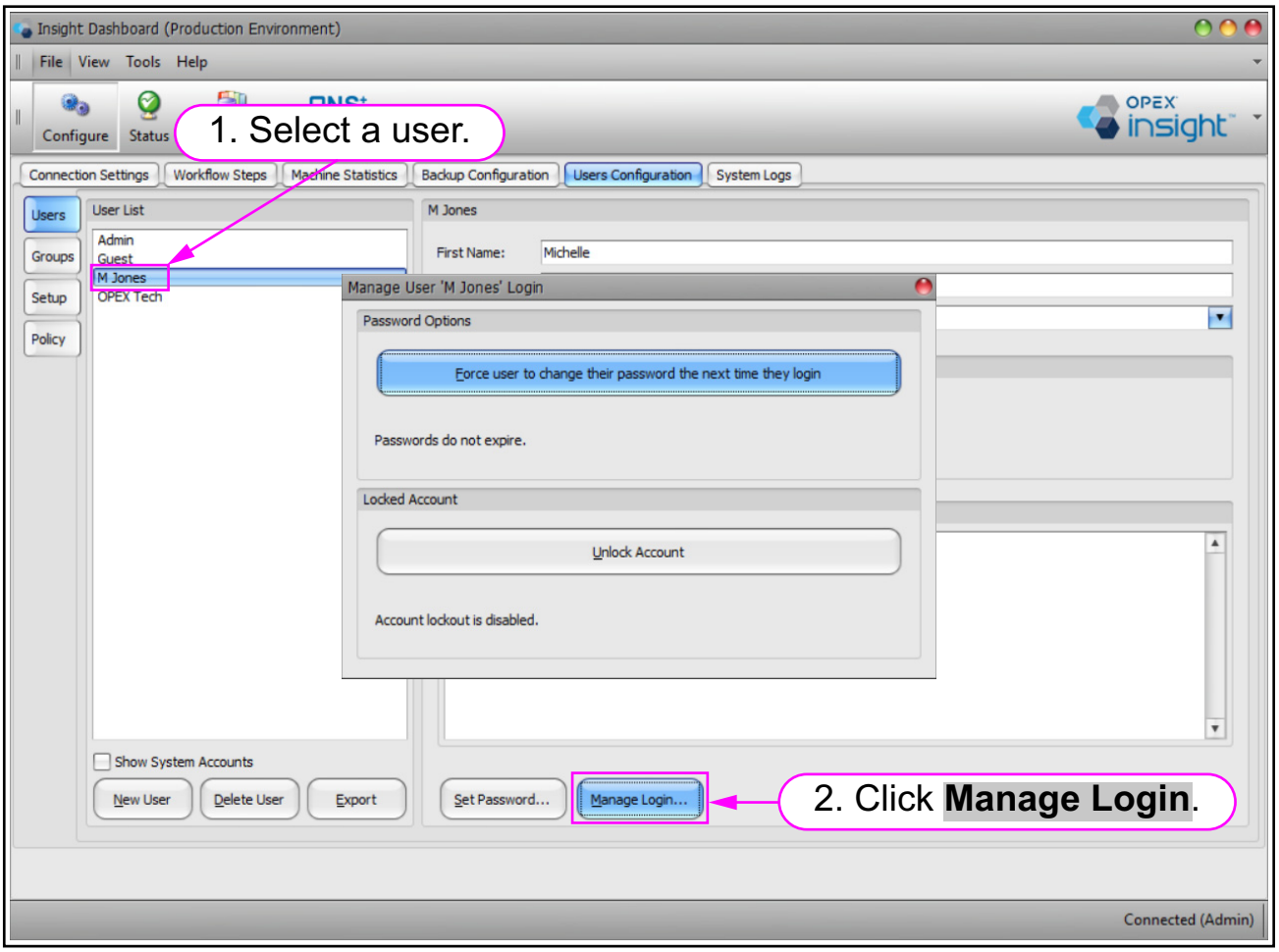

Figure 2-66: Clicking on `Manage Login`.

3. Optionally, click on **Force user to change their password the next time they login** (Figure 2-67). A success message window is displayed (Figure 2-68).

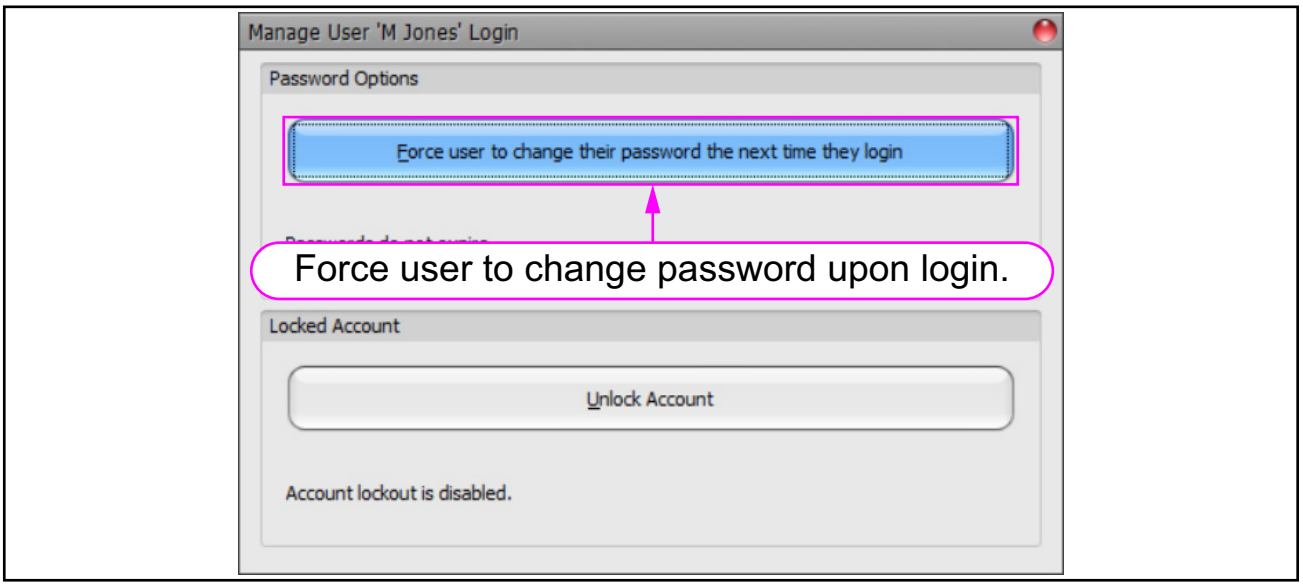

Figure 2-67: Forcing the user to change password.

4. Click **OK** to close the success message window.

Figure 2-68: Change-password-option success message.

5. Optionally, if the user's account is locked, click on **Unlock Account** (Figure 2-69). A success message window is displayed (Figure 2-70).

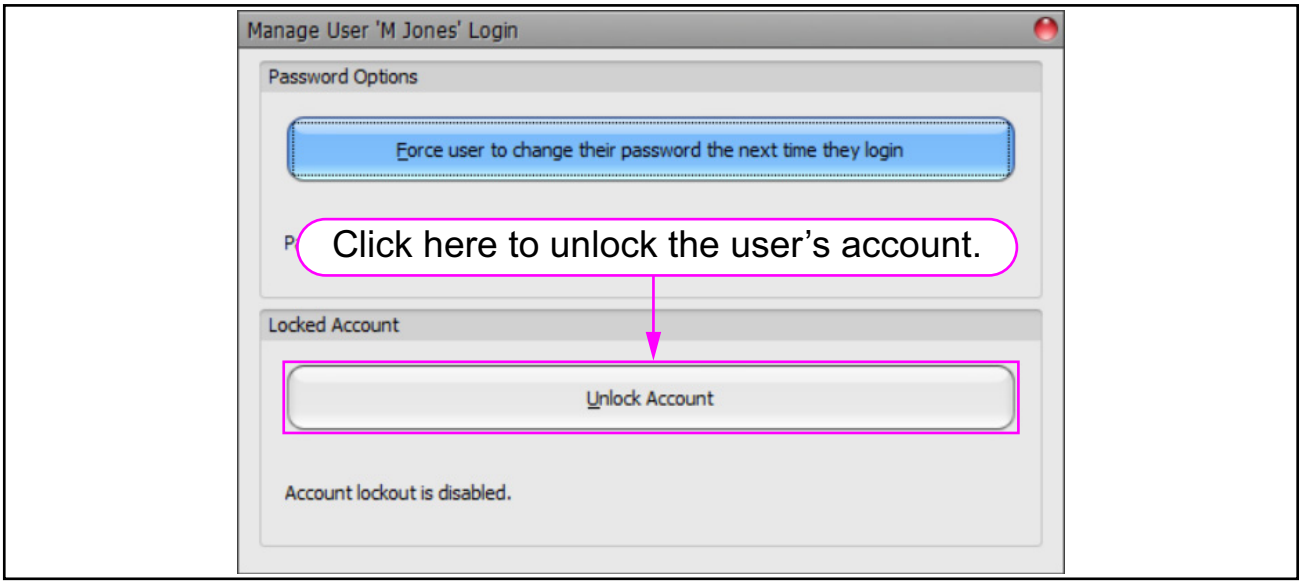

Figure 2-69: Unlocking the user's account.

6. Click **OK** to close the success message window.

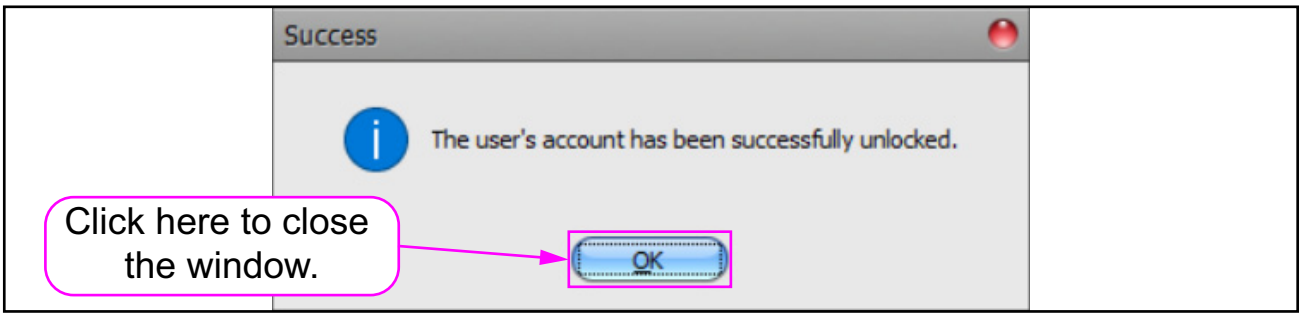

Figure 2-70: Unlock-account success message.

7. Close the **Manage User Login** window (Figure 2-71).

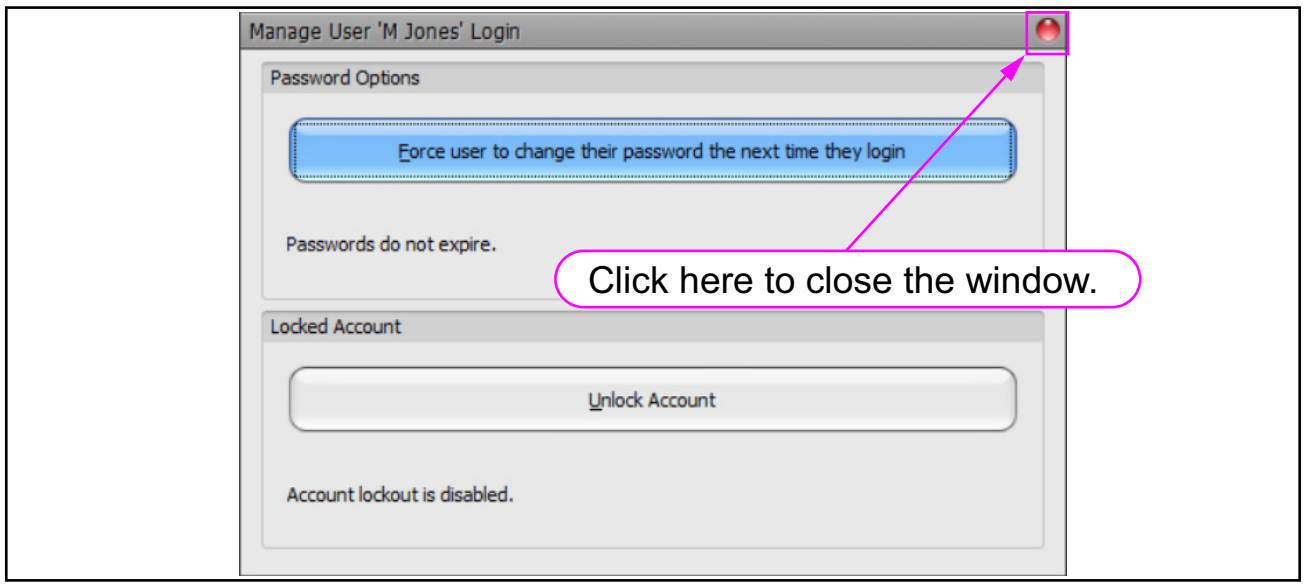

Figure 2-71: Closing the Manage Login window.

2.6.4. Setup - Active Directory Integration

Microsoft Active Directory (AD) is a service that stores network administration and security data (including user name and password information) in a centralized location designated by the Microsoft software. This allows user access to the various systems connected to the network to be managed from the central location rather than within each individual system or application.

An Insight system can integrate with Microsoft AD at several different levels. If your Insight system will be integrated with AD, the **Setup** tab is used to do the integration (Figure 2-72). Contact OPEX Tech Support for assistance.

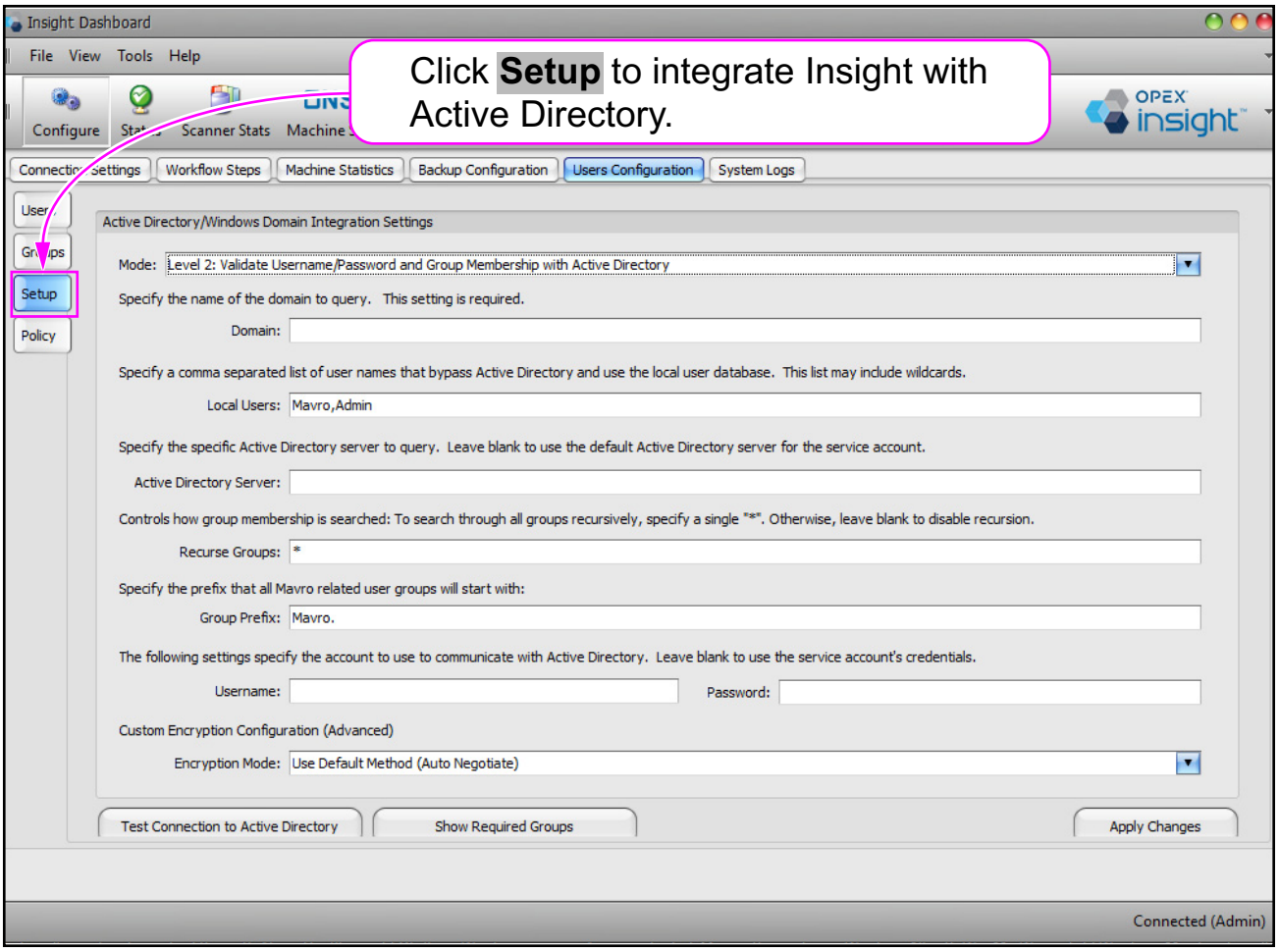

Figure 2-72: Active Directory Setup window.

2.6.4.1. Without Active Directory Integration

If your Insight system will *not* be integrated with Microsoft AD at your site, the user configuration tasks described earlier in this document apply in their entirety, and there is no need to change anything on the **Setup** tab.

2.6.4.2. With Active Directory Integration

If your Insight system is integrated with Microsoft AD at your site:

- The **Setup** tab is used to set the level of AD integration and to adjust a variety of AD-related settings. Setting the level of AD integration and the other settings on the tab is not a system user task. OPEX technicians will work with your IT department during system implementation to determine the required level of integration and to make the required changes on the **Setup** tab.
- Some or most of the user configuration tasks described earlier in this document will be performed in the centralized location on your Microsoft operating system rather than on your Insight system. These tasks will usually be handled by your IT department.
- Typically, some user configuration tasks will still need to be performed by an Insight system administrator or supervisor. The required tasks will vary, depending on how the Insight system is integrated with AD. Please consult with your Insight Applications Engineer to determine the specific tasks required on your system.

2.7. System Logs Tab

The Configure module **System Logs** tab provides access to your system's Access Log and Change Log (Figure 2-73).

- The **Access Log** provides information about each person who has attempted to access the Dashboard.
- The **Change Log** provides information about any changes made to the user configurations stored in the Insight system.

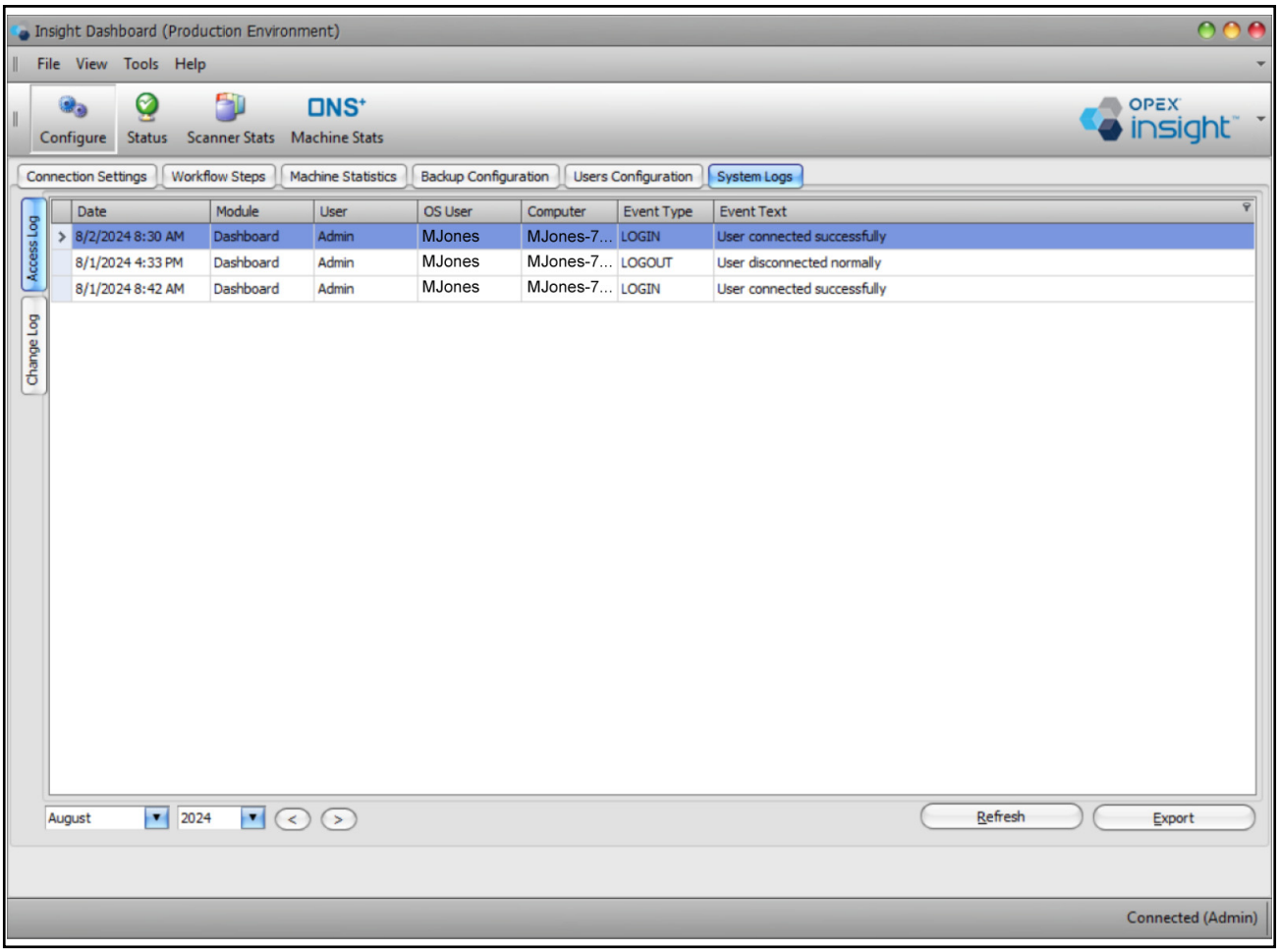

Figure 2-73: Systems Log.

2.7.1. Using the System Log

To view the **Access Log**:

1. Click the `System Logs` tab near the top (Figure 2-74).
2. Click the `Access Log` tab on the left side of the screen.
3. For each "Event" (i.e., an attempted login or logout), the Access Log will display (Figure 2-74):
   - **Date:** The date and time the event occurred.
   - **Module:** The Insight software module the user was attempting to access.
   - **User:** The Insight system user name for the person who made the attempt.
   - **OS User:** The Windows username used to sign into the computer on which the attempt was made.
   - **Computer:** The name of the computer used for the attempt.
   - **Event Type:** The "event type," such as a **LOGIN** or **FAILED LOGIN**.
   - **Event Text:** A text message describing the attempt.

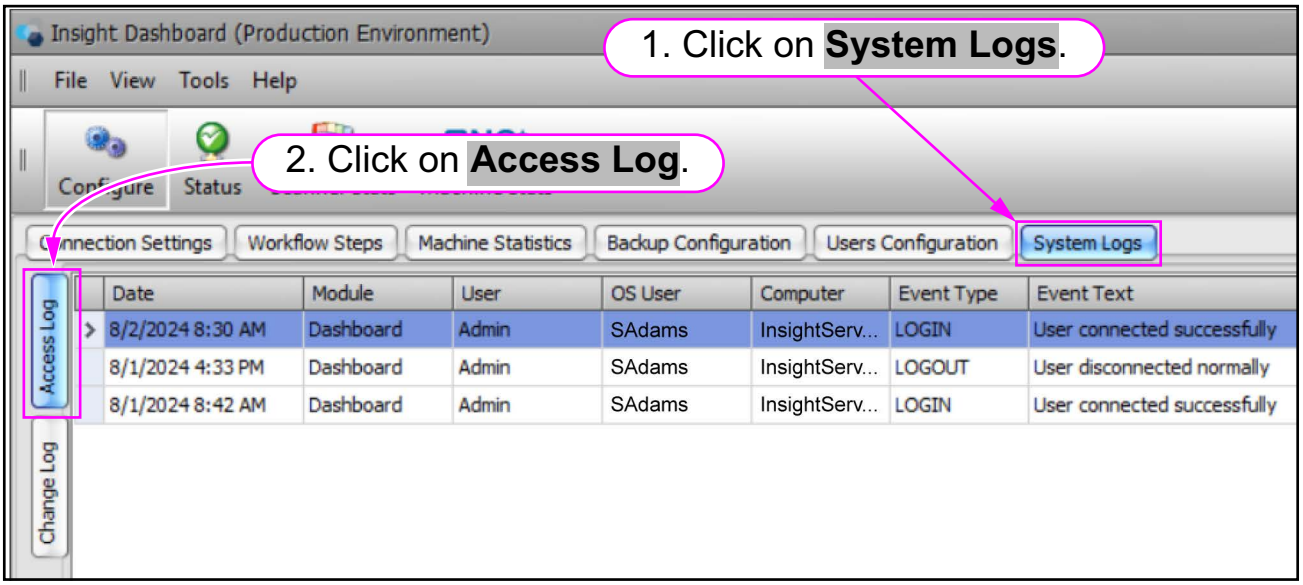

Figure 2-74: Access Log.

To view the **Change Log**:

1. Click the `System Logs` tab (Figure 2-75).
2. Click the `Change Log` tab on the left side of the screen.
3. For each “Event” (i.e., a change made to the user configurations stored in the Insight system), the change log will display:
   - **Date:** The date and time the event occurred.
   - **Module:** The Insight software module where the change was made.
   - **Mavro User:** The Insight system user name for the person who made the change.
   - **Windows User:** The Windows username used to sign into the computer on which the change was made.
   - **Computer:** The name of the computer used to make the change.
   - **Event Type:** The “event type,” such as **CREATE USER**, **DELETE USER**, or **POLICY CHANGE**.
   - **Event Text:** A text message describing the change.

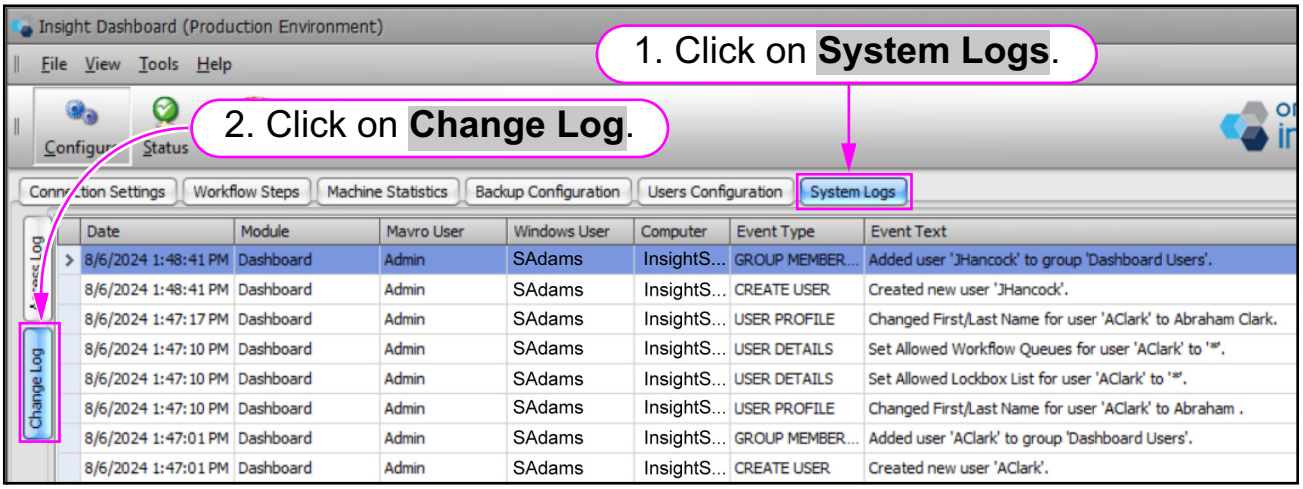

Figure 2-75: Change Log.

2.7.2. System Logs - Navigational Tools

Additional navigational tools appear at the bottom of the System Logs window (Figure 2-76):

- The access log and change log screens display one month of information at a time. Use the **Month** and **Year** drop-downs to select the specific month you would like to view.
- You can also use the left and right arrow buttons to step back and forth one month at a time.
- When viewing the current month, click the **Refresh** button to make sure the screen includes the latest access information.
- Click the **Export** button to export the information for the currently selected log and month in CSV format.
  a. A **File Explorer** window will open.
  b. Select the location on your computer where you would like the file to be saved.
  c. Enter a **File Name**.
  d. Click the **Save** button.

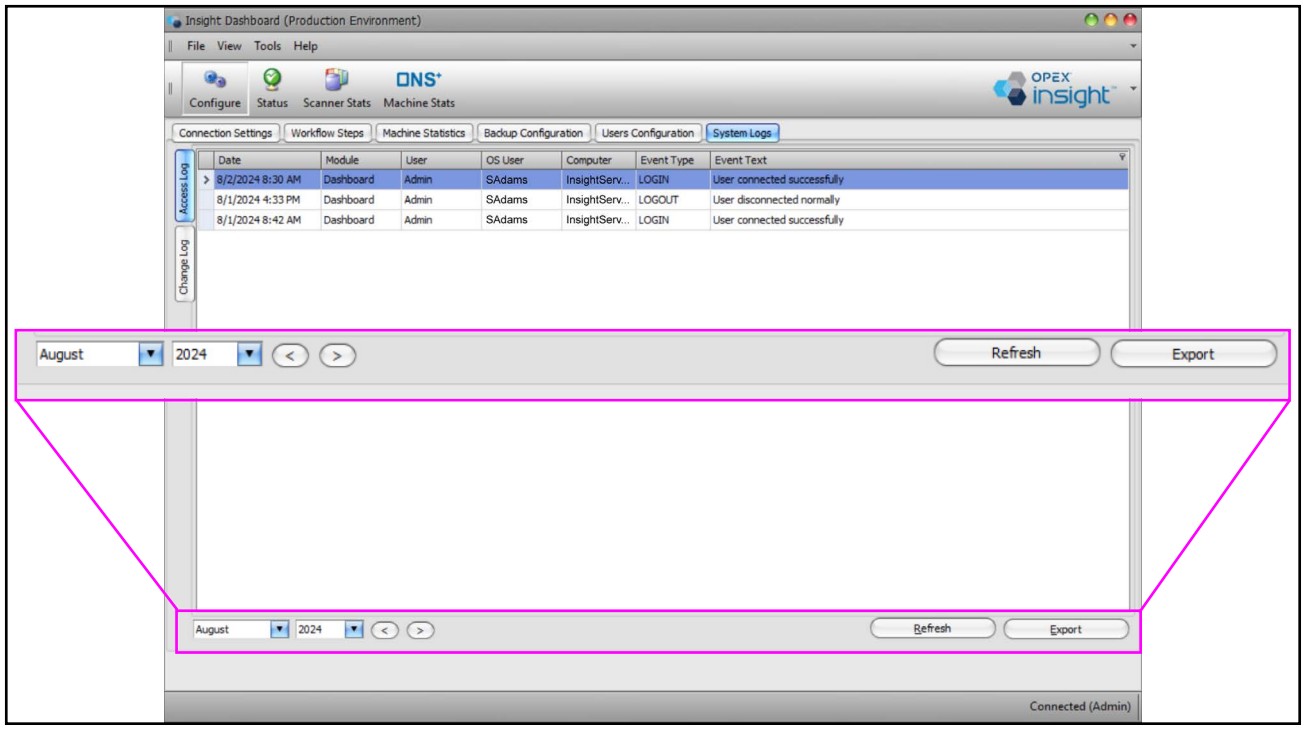

Figure 2-76: System Log navigational tools.

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3. Status Module

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3.1. Status Module Overview

The **Status** module provides an overview of the equipment operational status and alerts of detected issues. However, the operator cannot create, print, or export reports within this module.

The **Status** module includes five tabs (Figure 3-1):

1. **Overview**
2. **Scanner Status**
3. **Machine Status**
4. **Server Activity**
5. **Alarms**.

The **Overview** tab is selected by default.

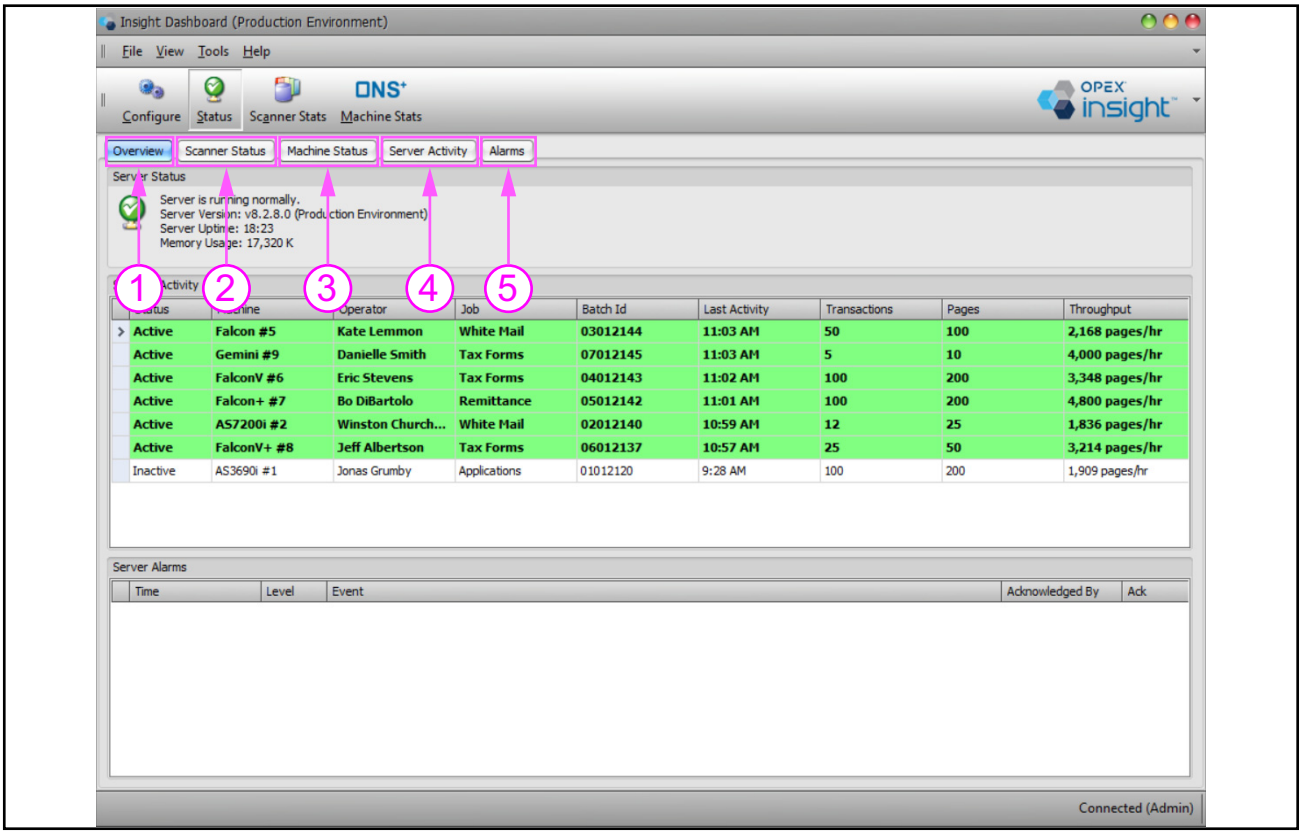


Figure 3-1: Status Module tabs

3.2. Overview Tab

The **Overview** tab is divided into three areas (Figure 3-2):

1. **Server Status:** Status of the connection between Insight Dashboard and the Mavbridge Core Service.
2. **Scanner Activity:** Status of the scanners.
3. **Server Alarms:** List of issues with creating and moving batches through Insight.

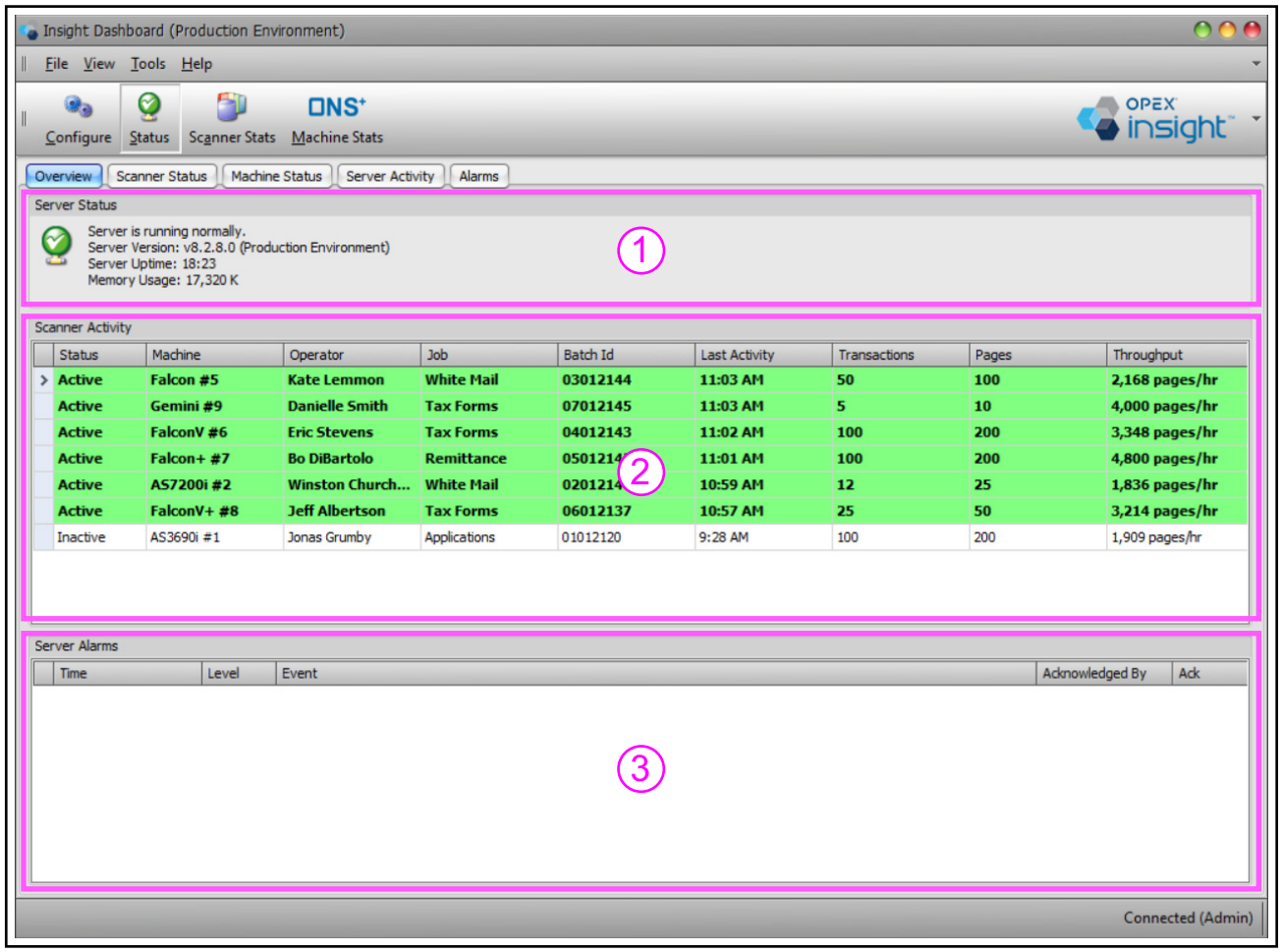


Figure 3-2: Three areas of the Overview Tab

3.2.1. Server Status Area

For the Insight Dashboard to function:

- Mavbridge Core Service must be running on the system server (the Insight Computer).
- Insight Dashboard must be successfully connected to the Mavbridge Core Service.

Note: *The Mavbridge Core Service can run on a virtual machine, depending on the Insight network setup.*

The **Server Status** area indicates whether the Insight Dashboard can connect with the Mavbridge Core Service (Figure 3-3).

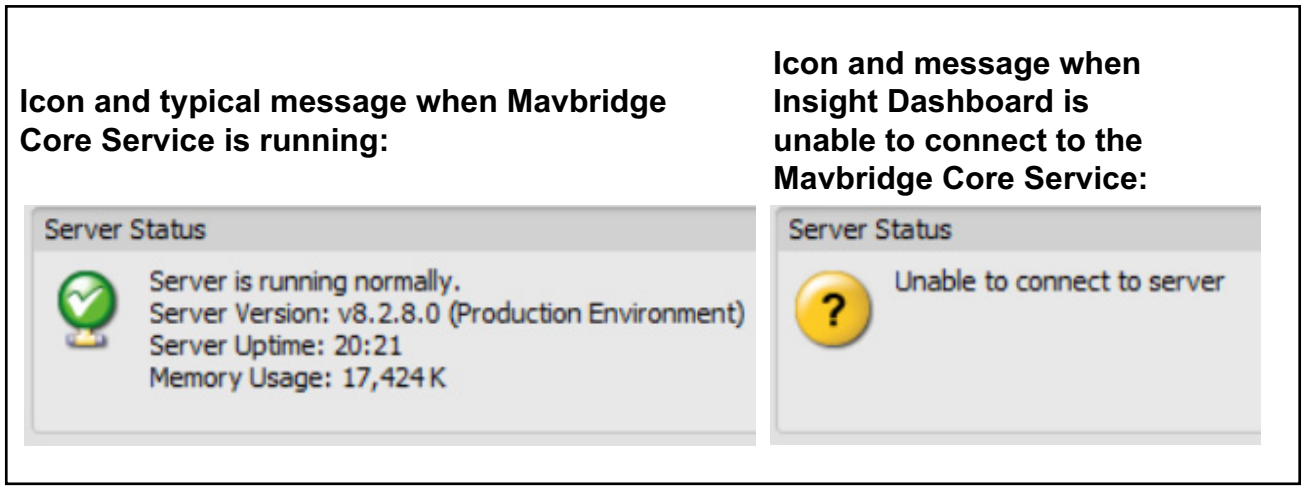


Figure 3-3: Server Status area

3.2.1.1. Resolving "Unable to connect to server" Status Message

If the message "Unable to connect to server" is displayed, there are two likely sources of the issue:

- The Mavbridge Core Service is not running.
- A network issue is preventing the Insight Dashboard from connecting to the Mavbridge Core Service.

3.2.1.1.1. What to Do if Mavbridge Core Service is Not Running

If the Mavbridge Core Service is not running, follow these steps:

1. In the Configure Module, verify that the IP address for the Mavbridge Core Service is correct.
2. If the previous step does not solve the issue, ask your IT department to make sure that the Mavbridge Core Service is running in Windows Services.

   Note: *If the Insight Computer is directly connected to the network, a username and password may need to be assigned to the Mavbridge Core Service.*
3. Repeatedly needing to restart the service may indicate an issue. Contact OPEX Technical Support for assistance.

3.2.1.1.2. What to Do if There is a Network Issue

Contact your IT department for assistance.

3.2.2. Scanner Activity Area

The **Scanner Activity** area provides an overview of the operating status for each scanner connected to the Insight system (Figure 3-4).

Note: *A scanner's data will only be populated if the CertainScan setting for ONS is set to* `Live machine and state`*. (That setting is found at* `System Setup > System > ONS Settings`*.)*

Note: *The* **Scanner Activity** *area only displays the operating status of scanners. It does not display data about the Rapid Extraction Desks or capital machines.*

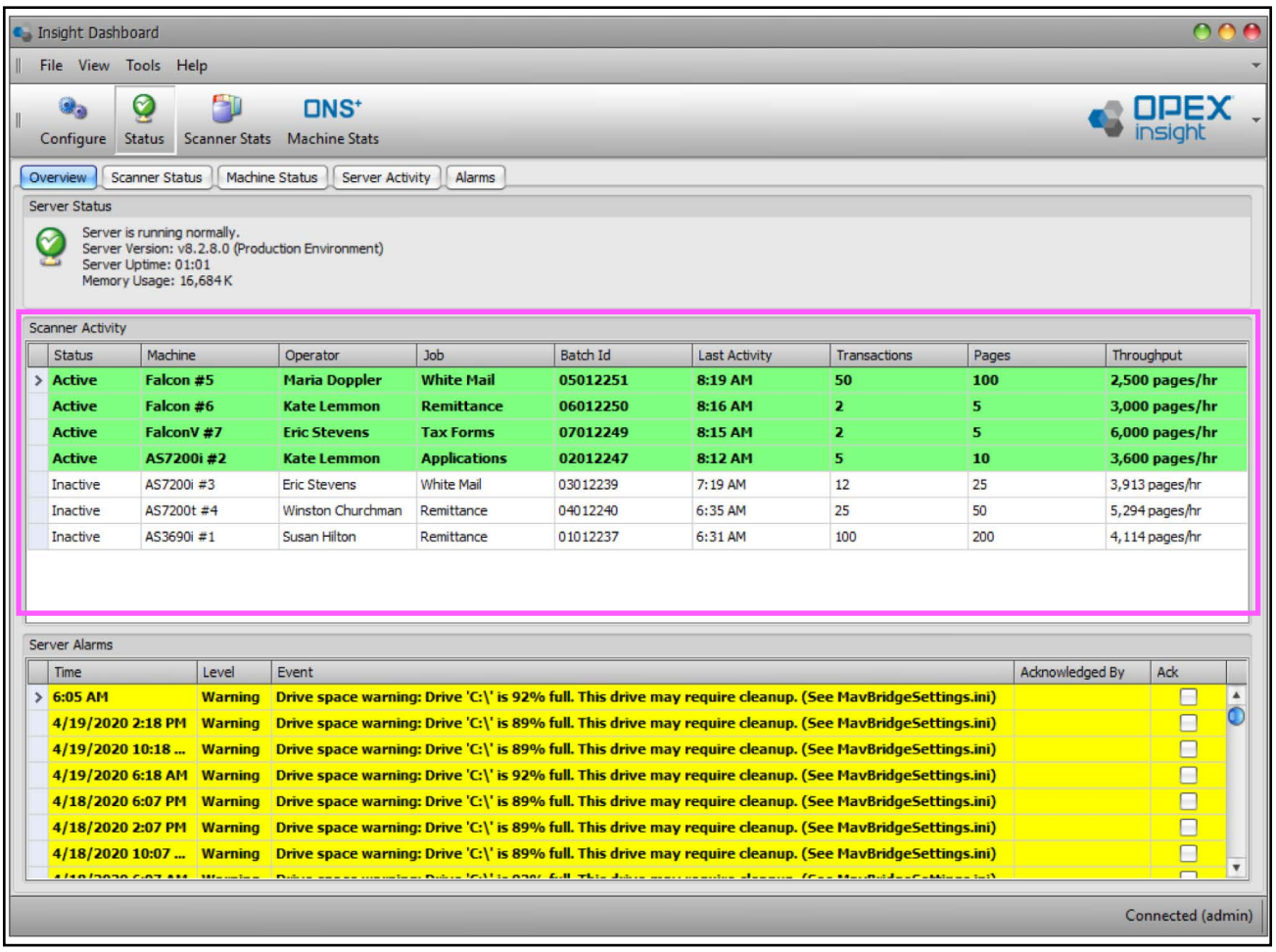


Figure 3-4: Scanner Activity area

3.2.2.1. Scanner Activity Column Headings

The **Scanner Activity** area displays nine columns of information (Figure 3-5):

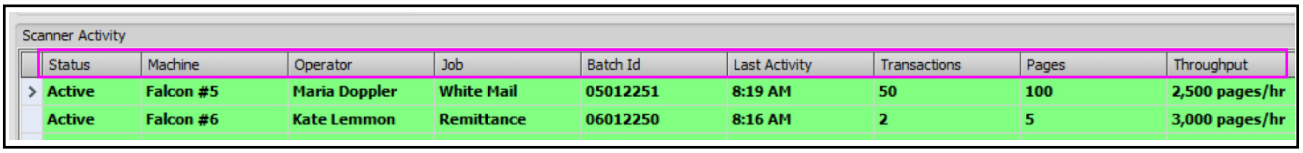


Figure 3-5: Scanner Activity column headings

Status: Scanner status

- Active (Green Highlight): Scanner is currently active or has completed a batch within the last 15 minutes.
- Idle (Yellow Highlight): Scanner has completed a batch within the last 60 minutes, but not within the last 15 minutes.
- Inactive (No Highlight): Scanner has been idle for 60 minutes or more.
- Unlisted: Scanner is automatically removed from list if it has not completed a batch within the last 48 hours.

Machine: Name assigned to the scanner, e.g., **Gemini #9**.

Operator: Name of the operator who ran the last batch.

Job: Scanner Job used to run the last batch.

Batch Id: Batch number for the last batch run.

Last Activity: Completion time of the last batch run.

Transactions: Number of transactions in the last batch run.

Pages: Number of pages in the last batch run.

Throughput: Number of pages per hour processed for the last completed batch.

Note: *Some high speed scanners process multiple batches simultaneously, so the time for processing one specific batch can be extended, resulting in a lower-than-actual throughput being displayed. Actual throughout numbers for each scanner are available in the* **Scanner Stats** *module.*

3.2.2.2. What to Do if Many Machines are Listed as Inactive

If all or most machines are listed as inactive, consider these possibilities:

- **Scanners not running:** Check with operations to make sure the scanners are running. Machines could be down for service or not being used.
- **Scanner CertainScan Settings:** At each scanner, confirm that the CertainScan ONS setting is `Live machine and state`.
- **Changes to the environment:** Ask your IT department if any changes have been made to the network. Changes to the folder structure or to assignments of rights could make scanners inaccessible to the OPEX Insight software.

3.2.3. Server Alarms Area

Insight continuously checks the Insight Computer for issues that could interfere with creating batches and moving them through the Insight system. Detected issues are displayed as alarms in the **Server Alarms** area of the **Overview** tab (Figure 3-6).

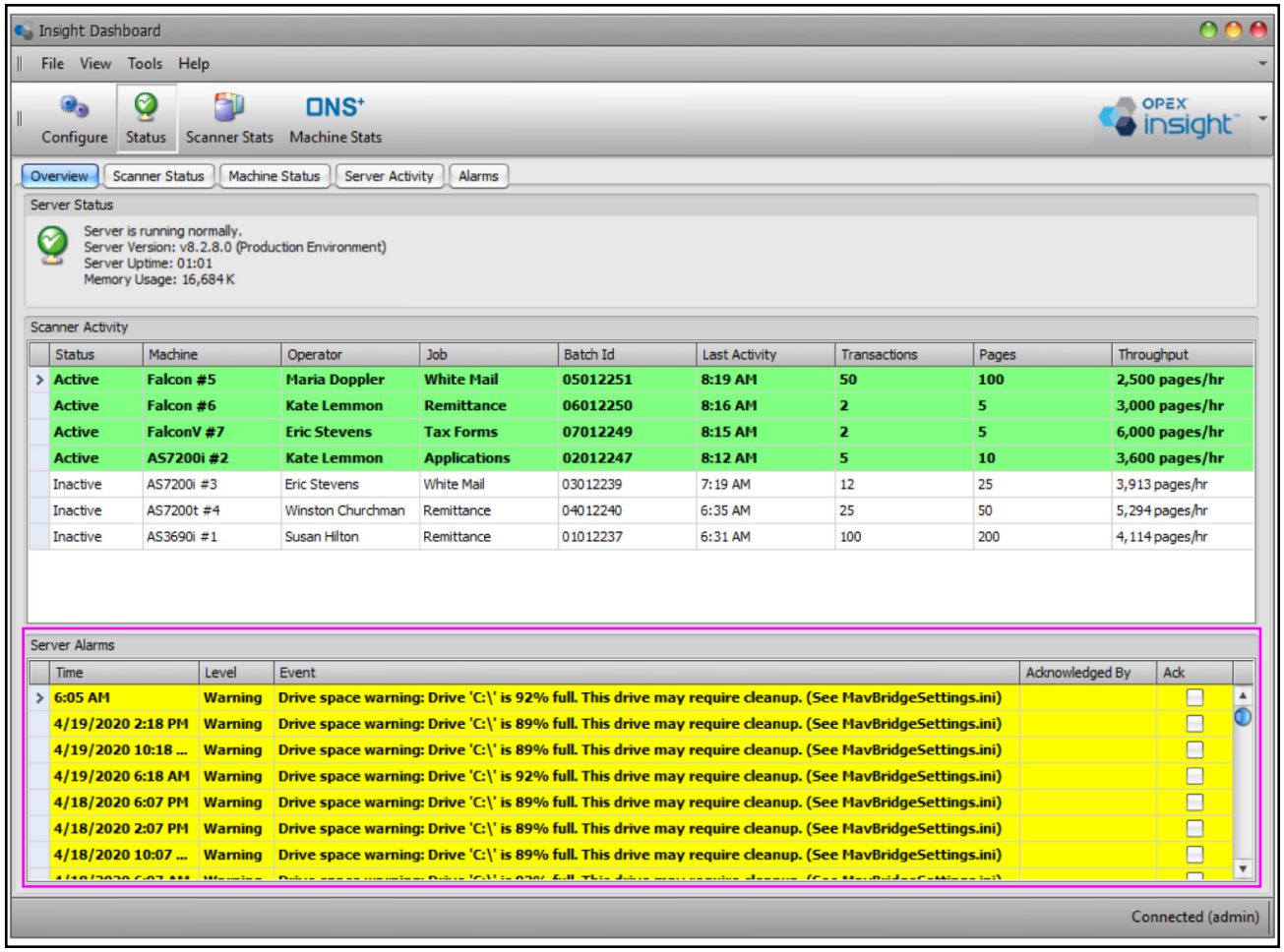


Figure 3-6: Server Alarms area

The **Server Alarms** area displays three alarm levels (Figure 3-7):

- Error (Red Highlight): Condition that requires immediate attention.
- Warning (Yellow Highlight): Condition that could cause serious issues if not addressed soon.
- Error or Warning not Highlighted: Alarm that has been corrected and acknowledged. Prior alarms are saved as a history for future reference.

Note: *Sometimes an alarm message is too long to display on a single line. Double-click on the alarm to open the full error message in a pop-up window.*

Dashboard users (typically a supervisor or manager) are responsible for investigating alarms, correcting the issues, and acknowledging the alarms. Unacknowledged alarms remain highlighted to indicate unresolved issues.

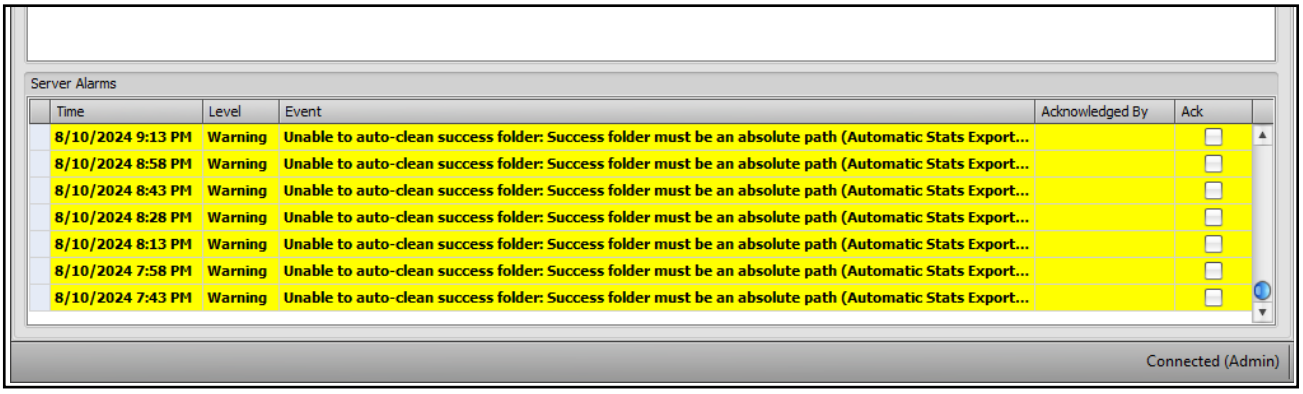


Figure 3-7: Yellow warning alarms

3.2.3.1. Clearing a Yellow Warning Alarm

To clear a yellow warning alarm, read the warning message, decide whether any action is necessary, and acknowledge the alarm.

The steps in dealing with a yellow alarm are described below with an example of a warning that the disk drive is becoming too full:

1. **Review the alarm:** A drive space warning is displayed. This warning, as is the case with most warning alarms, alerts you to a potential developing issue. In this case, the disk space available to your system is becoming too full. If unaddressed, this can lead to an error and system stoppage.

   Contact your IT department and ask them to clean up the existing space or assign more space.

2. **Decide whether to take any action:** In most cases, warning alarms are informational and don't require immediate intervention. Typically, they inform you about a potential issue you should be aware of and that you may want to investigate.

3. **Acknowledge the alarm:** Click the **Ack** check box at the right end of the warning alarm line (Figure 3-8).
   - The warning alarm line turns white to indicate that the alarm has been acknowledged.
   - The **Acknowledged by** column indicates who acknowledged the alarm.

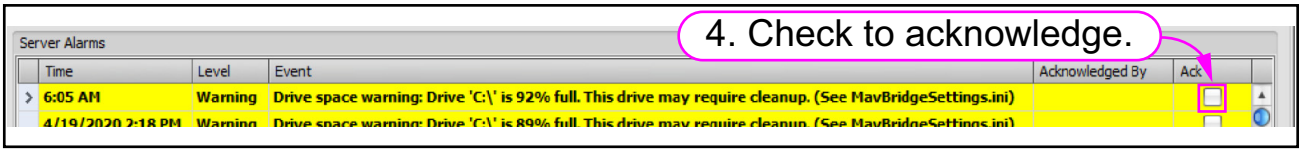


Figure 3-8: Acknowledging an alarm

Note: *The acknowledged white alarm remains in the list to serve as an alarm history.*

Note: *If you mistakenly acknowledge an alarm, uncheck the* **Ack** *check box and the alarm will return to its original state.*

3.2.3.2. Clearing a Red Error Alarm

Clearing a red error alarm is explained in the following common example of a file conversion error:

1. **Review the alarm.**
2. **View alarm details:** Determine the cause of the error.
3. **Decide on the action to take:** Determine how to fix the error.
4. **Acknowledge the alarm:** Acknowledge the alarm by clicking the **Ack** check box.
   - The alarm line turns white to indicate that the alarm has been acknowledged.
   - The **Acknowledged by** column indicates who acknowledged the alarm.

Note: *Typically, an error alarm will be highlighted in red, and checking the* **Ack** *box will change the highlight from red to white. In the example of a conversion failure error alarm, a successful retry turns the alarm color from red to green. Checking the* **Ack** *box changes the green highlight to white.*

Note: **Simply acknowledging an alarm does not solve the underlying issue***; it only removes the highlight from the alarm to indicate that you have addressed the issue that caused the alarm. Don't acknowledge an alarm until you have addressed the issue. When in doubt, contact OPEX Technical Support for assistance.*

3.3. Scanner Status Tab

The **Scanner Status** tab displays exactly the same information as the **Scanner Activity** area on the **Overview** tab, but with a taller window to enable viewing of more scanners (Figure 3-9).

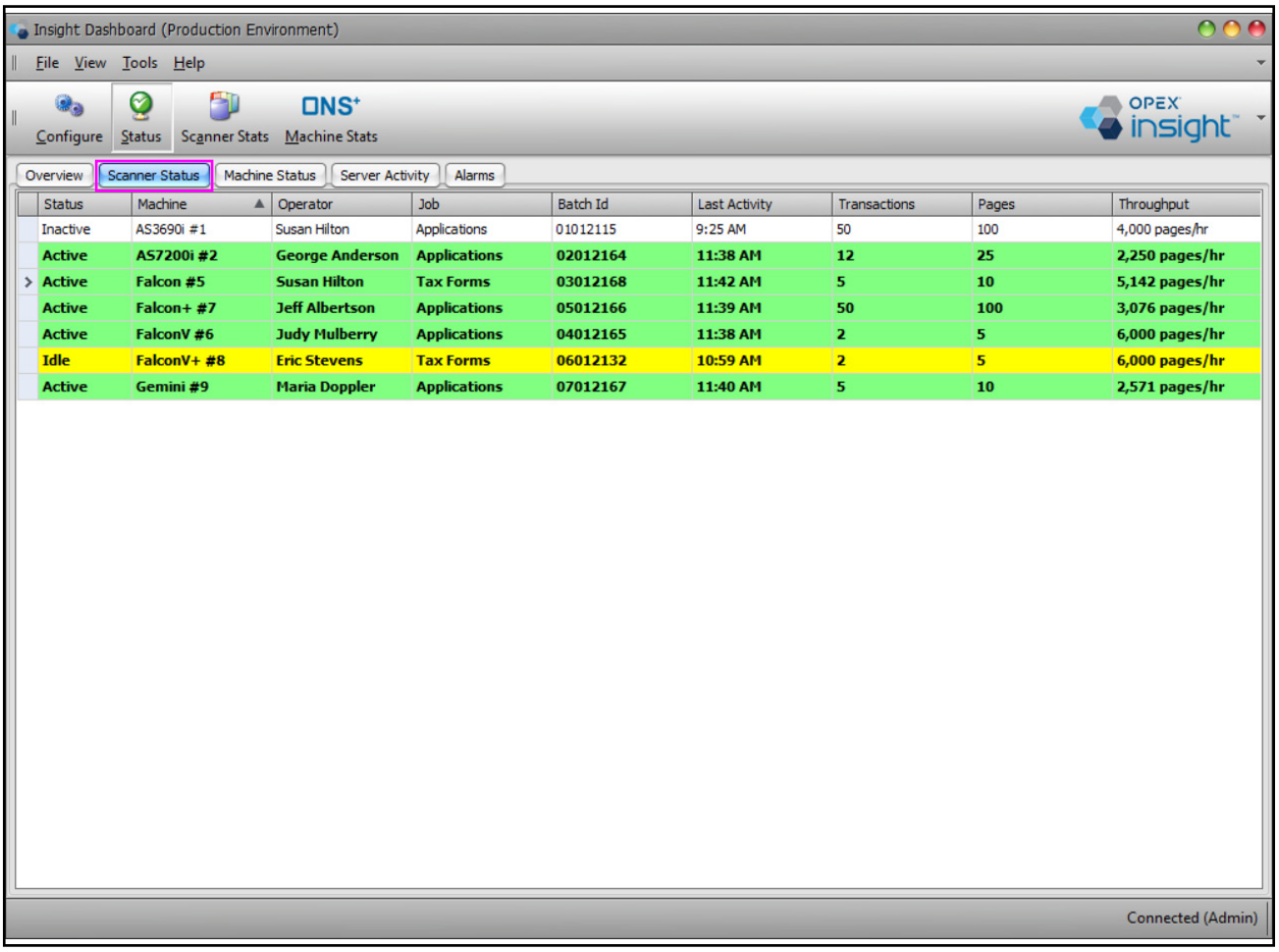
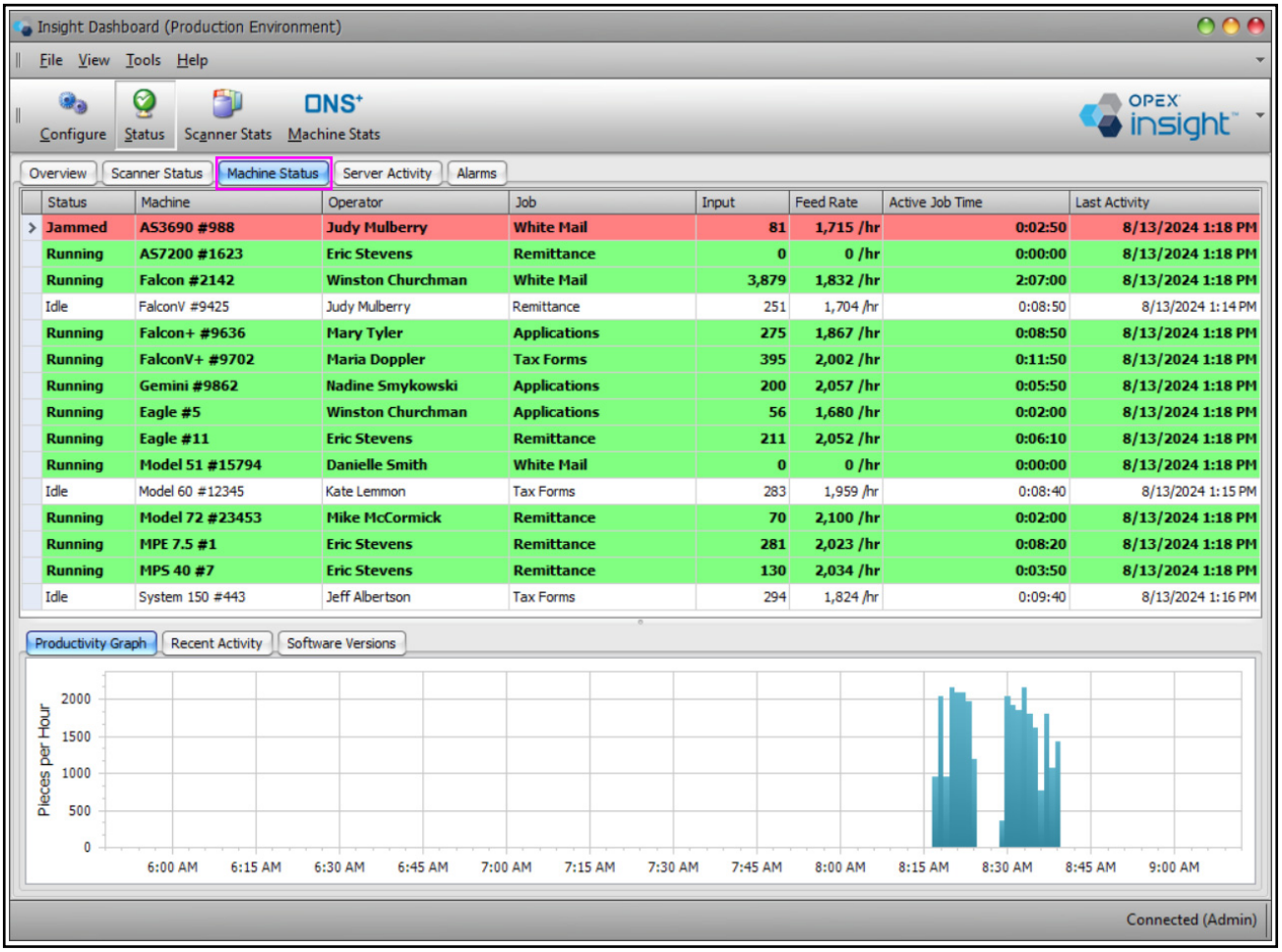


Figure 3-9: Scanner Status tab

3.4. Machine Status Tab

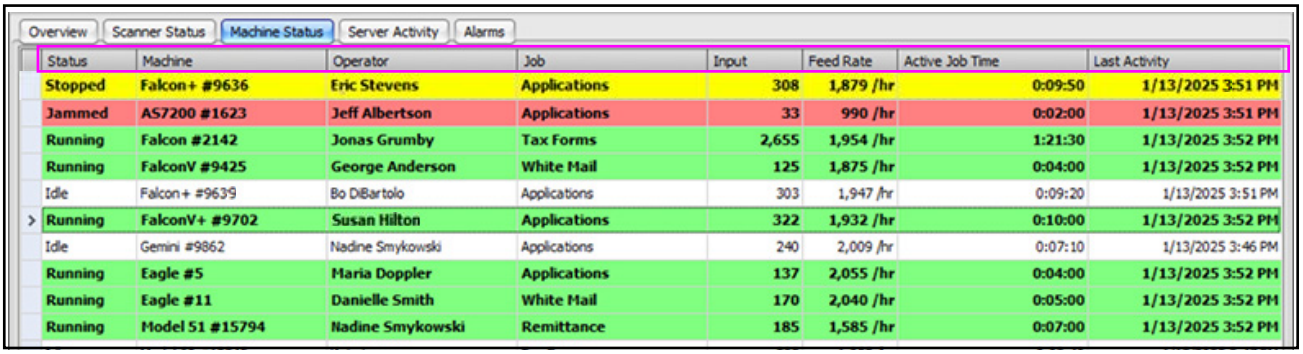
The **Machine Status** tab (Figure 3-10) provides an overview of the operating status for each machine connected to the Insight system.



Status	Machine	Operator	Job	Input	Feed Rate	Active Job Time	Last Activity
Jammed	AS3690 #988	Judy Mulberry	White Mail	81	1,715 /hr	0:02:50	8/13/2024 1:18 PM
Running	AS7200 #1623	Eric Stevens	Remittance	0	0 /hr	0:00:00	8/13/2024 1:18 PM
Running	Falcon #2142	Winston Churchman	White Mail	3,879	1,832 /hr	2:07:00	8/13/2024 1:18 PM
Idle	FalconV #9425	Judy Mulberry	Remittance	251	1,704 /hr	0:08:50	8/13/2024 1:14 PM
Running	Falcon+ #9636	Mary Tyler	Applications	275	1,867 /hr	0:08:50	8/13/2024 1:18 PM
Running	FalconV+ #9702	Maria Doppler	Tax Forms	395	2,002 /hr	0:11:50	8/13/2024 1:18 PM
Running	Gemini #9862	Nadine Smykowski	Applications	200	2,057 /hr	0:05:50	8/13/2024 1:18 PM
Running	Eagle #5	Winston Churchman	Applications	56	1,680 /hr	0:02:00	8/13/2024 1:18 PM
Running	Eagle #11	Eric Stevens	Remittance	211	2,052 /hr	0:06:10	8/13/2024 1:18 PM
Running	Model 51 #15794	Danielle Smith	White Mail	0	0 /hr	0:00:00	8/13/2024 1:18 PM
Idle	Model 60 #12345	Kate Lemmon	Tax Forms	283	1,959 /hr	0:08:40	8/13/2024 1:15 PM
Running	Model 72 #23453	Mike McCormick	Remittance	70	2,100 /hr	0:02:00	8/13/2024 1:18 PM
Running	MPE 7.5 #1	Eric Stevens	Remittance	281	2,023 /hr	0:08:20	8/13/2024 1:18 PM
Running	MPS 40 #7	Eric Stevens	Remittance	130	2,034 /hr	0:03:50	8/13/2024 1:18 PM
Idle	System 150 #443	Jeff Albertson	Tax Forms	294	1,824 /hr	0:09:40	8/13/2024 1:16 PM

Figure 3-10: Machine Status tab

The Machine Status tab displays eight columns of information (Figure 3-11):



Status	Machine	Operator	Job	Input	Feed Rate	Active Job Time	Last Activity
Stopped	Falcon+ #9636	Eric Stevens	Applications	308	1,879 /hr	0:09:50	1/13/2025 3:51 PM
Jammed	AS7200 #1623	Jeff Albertson	Applications	33	990 /hr	0:02:00	1/13/2025 3:51 PM
Running	Falcon #2142	Jonas Grumby	Tax Forms	2,655	1,954 /hr	1:21:30	1/13/2025 3:52 PM
Running	FalconV #9425	George Anderson	White Mail	125	1,875 /hr	0:04:00	1/13/2025 3:52 PM
Idle	Falcon+ #9639	Bo DiBartolo	Applications	303	1,947 /hr	0:09:20	1/13/2025 3:51 PM
Running	FalconV+ #9702	Susan Hilton	Applications	322	1,932 /hr	0:10:00	1/13/2025 3:52 PM
Idle	Gemini #9862	Nadine Smykowski	Applications	240	2,009 /hr	0:07:10	1/13/2025 3:46 PM
Running	Eagle #5	Maria Doppler	Applications	137	2,055 /hr	0:04:00	1/13/2025 3:52 PM
Running	Eagle #11	Danielle Smith	White Mail	170	2,040 /hr	0:05:00	1/13/2025 3:52 PM
Running	Model 51 #15794	Nadine Smykowski	Remittance	185	1,585 /hr	0:07:00	1/13/2025 3:52 PM

Figure 3-11: Machine Status Table Columns

Status: Machine status.

- Running (Green Highlight): Machine is currently running.
- Stopped (Yellow Highlight): Machine has stopped running.
- Jammed (Red Highlight): Machine is jammed and needs attention.
- Idle (No Highlight): Machine has been idle for 60 minutes or more.
- Unlisted: Machine is automatically removed from the list if it has not been running within the last 48 hours.

Machine: Name assigned to the machine, e.g., **FalconV #9425**.

Operator: Name of the operator who ran the machine.

Job: Scanner Job used to run the machine.

Input: Number of pieces fed into the machine.

Feed Rate: Number of pieces per hour the machine is currently feeding.

Active Job Time: Time the machine was either actively running or halted due to a jam. Active Job Time is broken down into:

- Run Time
- Jam Time

Last Activity: Time when the machine was last run.

The bottom area of the **Machine Status** tab offers three additional tabs (Figure 3-12):

1. **Productivity Graph**
2. **Recent Activity**
3. **Software Versions**

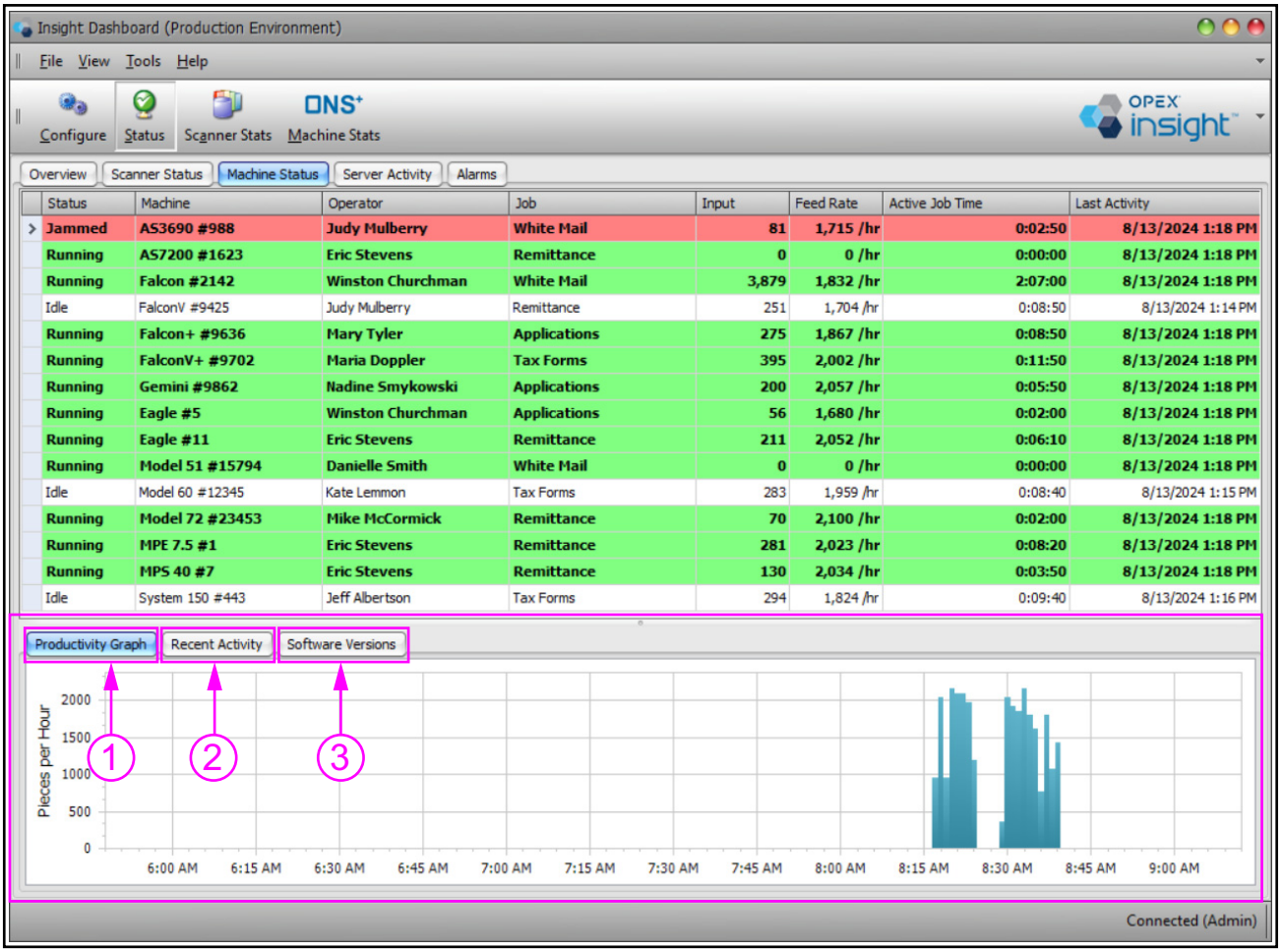


Figure 3-12: Bottom Area of Machine Status tab display

3.4.1. Productivity Graph

The **Productivity Graph** tab displays a graph showing the pieces per hour on each machine (Figure 3-13).

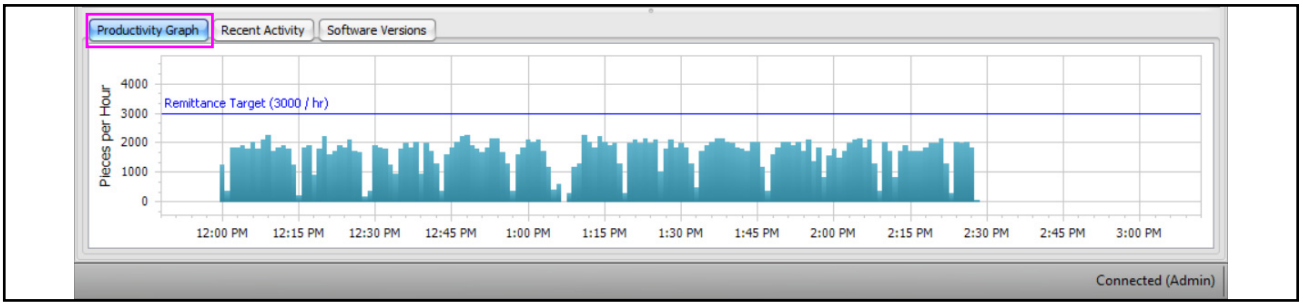


Figure 3-13: Productivity graph

1. Click on the **Productivity Graph** tab (Figure 3-14).
2. Click on a row in the table above. In the **Productivity Graph**:
   - The machine's productivity is plotted.
   - The Target Rate of the Job running on that machine is displayed as a blue line labeled "**Target**" with the Job's name (Figure 3-14).

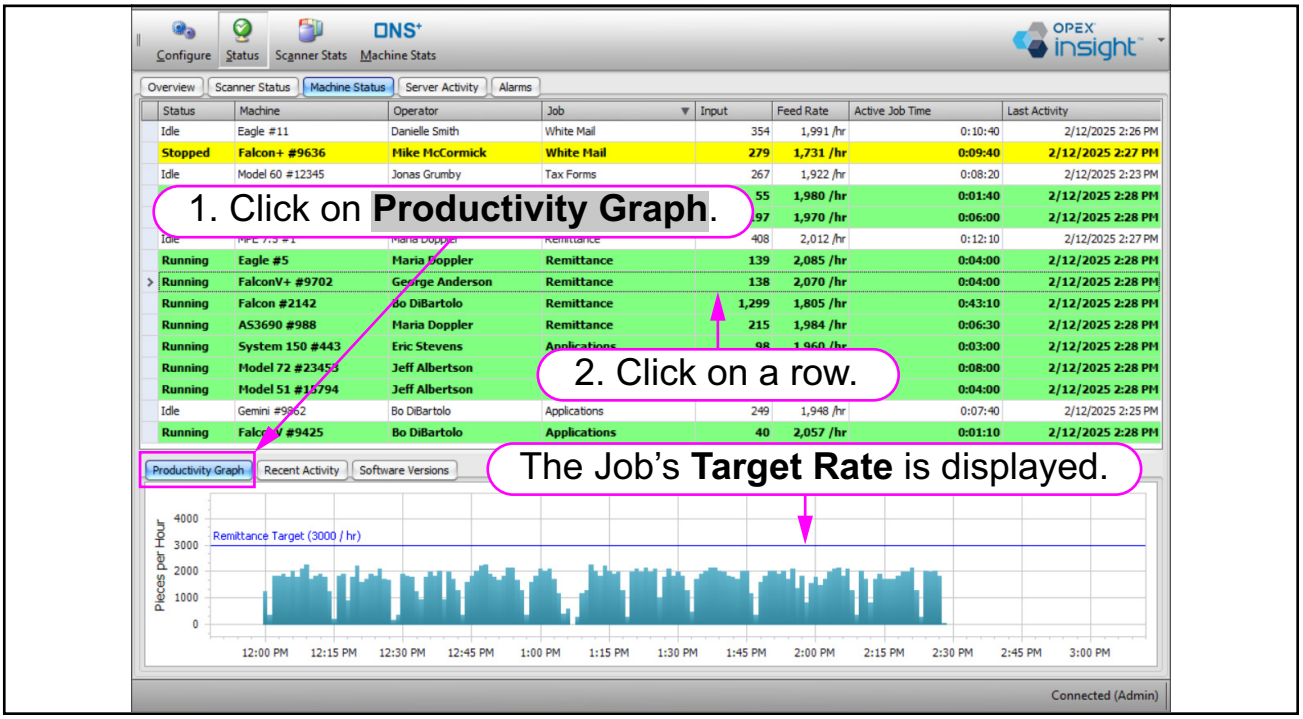


Figure 3-14: Displaying the Target Rate of a Job

3.4.2. Recent Activity

Click on the **`Recent Activity`** tab to display recent machine activity (Figure 3-15).

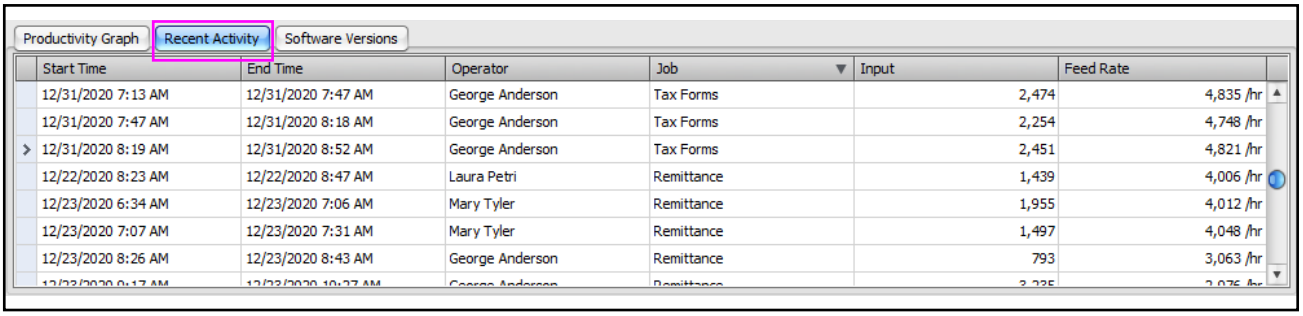


Figure 3-15: Recent Activity

3.4.3. Software Versions

The **Software Versions** tab allows you to use Insight Dashboard to view the software and firmware versions of all machines from one central location, rather than obtaining that information by visiting each machine (Figure 3-16).

1. Click on the **`Software Versions`** tab.
2. Highlight a machine.
3. View the machine's software and firmware at the **Software Versions** tab.

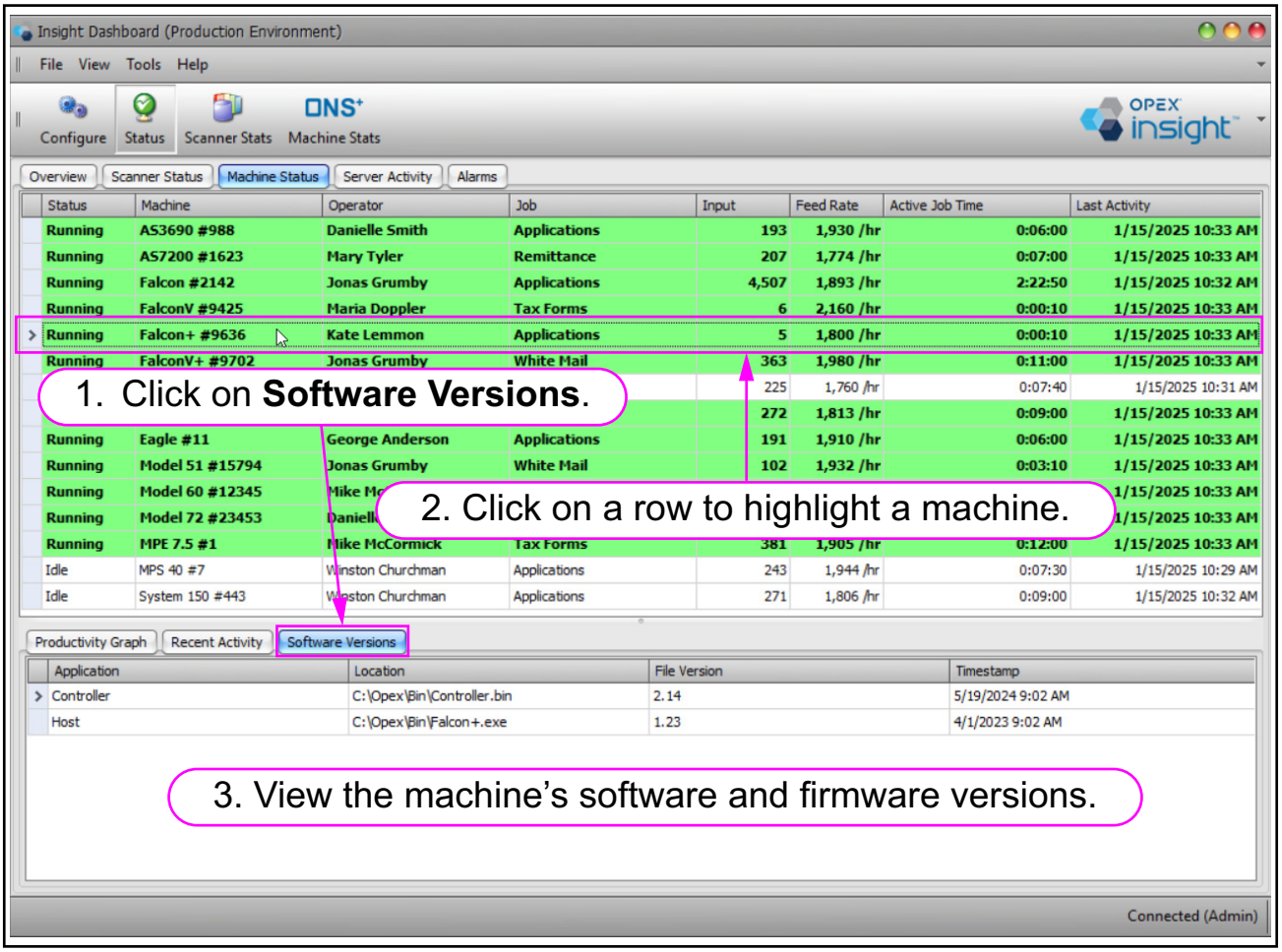


Figure 3-16: Using the Software Versions tab

The **Software Versions** tab displays four columns of information (Figure 3-17):

Application: Name of the software or firmware.

Location: Location on the machine's Host Computer.

File Version: Version of the software or firmware.

Timestamp: Time the software or firmware was last updated.

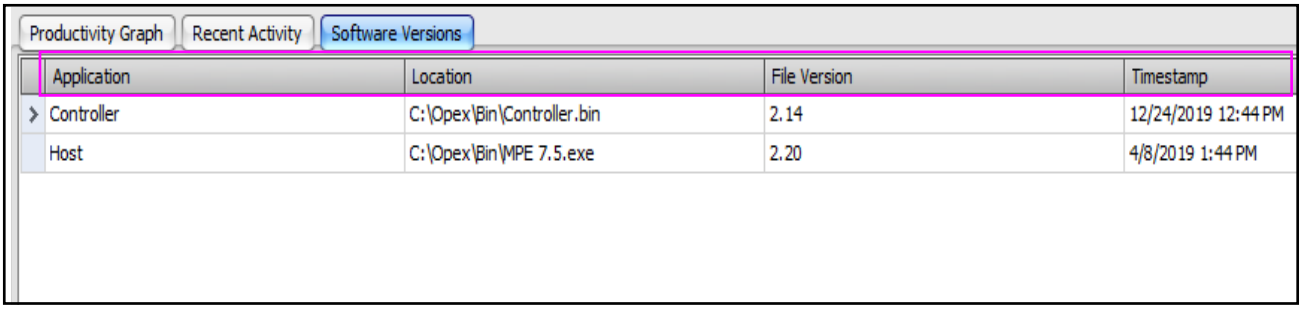


Figure 3-17: Software Versions columns

3.5. Server Activity Tab

The **Server Activities** tab lists all of the activities performed by the server (Insight Computer). Typically, the list contains routine activities performed by the server (Figure 3-18).

The list also includes any server alarms generated by your system. Although you can view the alarms on this tab, you can't acknowledge them here.

The **Server Activities** tab includes these areas:

- The **Current Activity** area displays, in real time, the details of the server's activities at this instant.
- The **Recent Activity** area displays a historical record of tasks that have been completed.

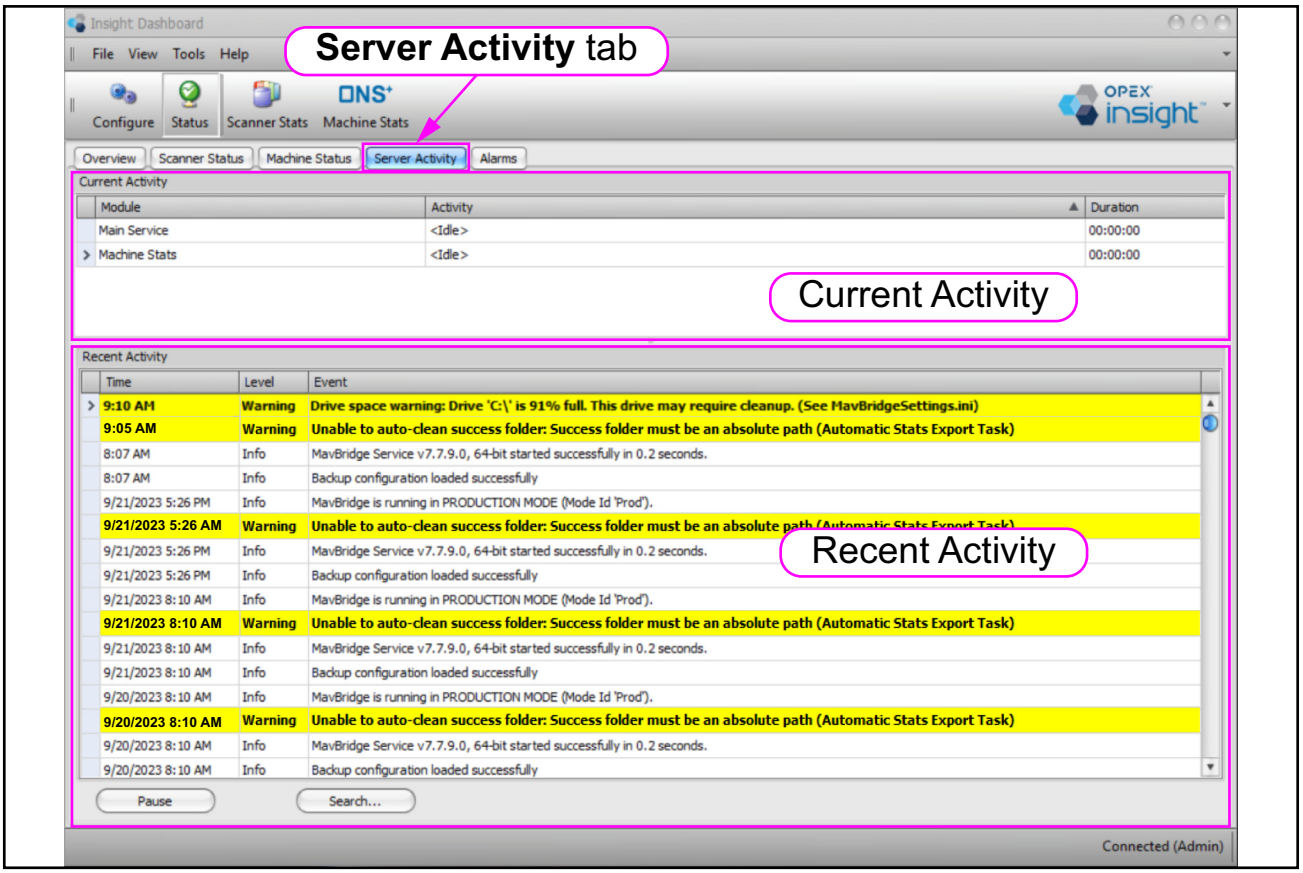


Figure 3-18: Server Activity tab

3.5.1. Pause Refreshing of Recent Activity Display

To temporarily stop Insight Dashboard from refreshing the display with new server events:

1. In the **Recent Activity** area, click **Pause** (Figure 3-19).

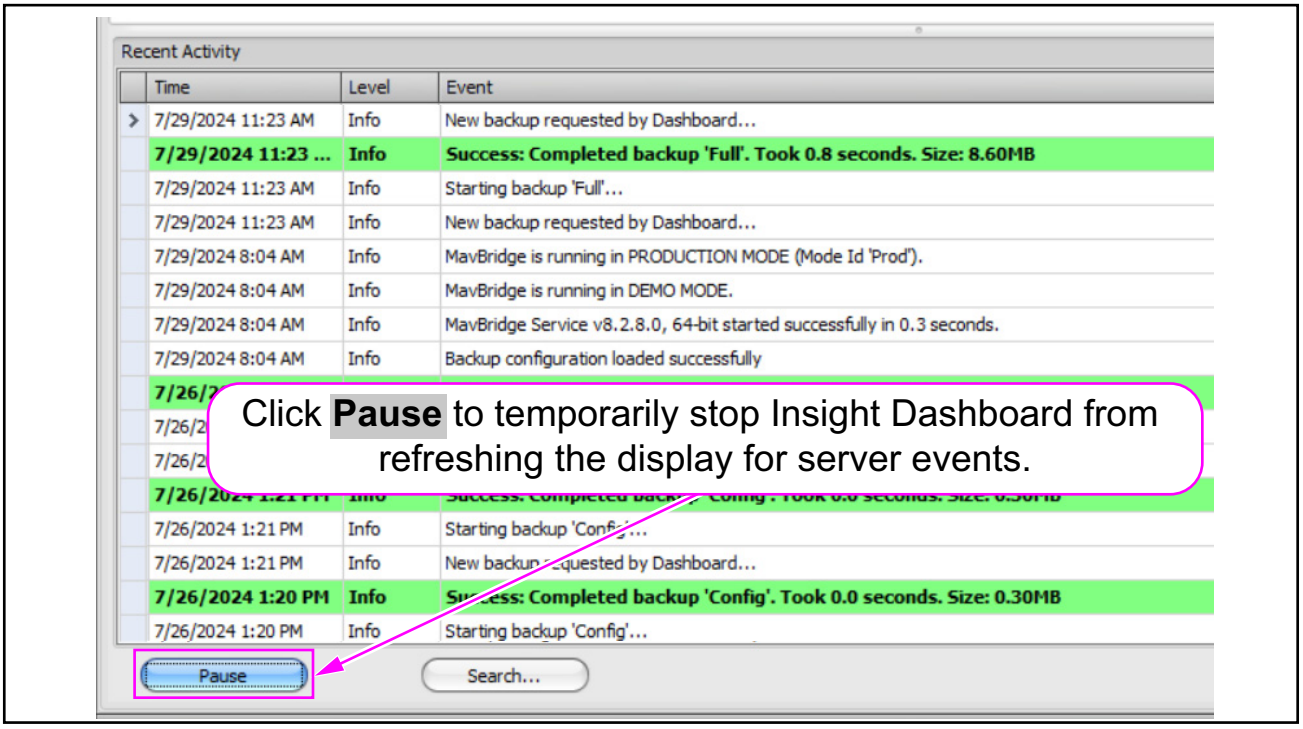


Figure 3-19: Clicking Pause

2. The **Pause** button becomes the **Resume** button. Click **Resume** for the display to continue to be refreshed (Figure 3-20).

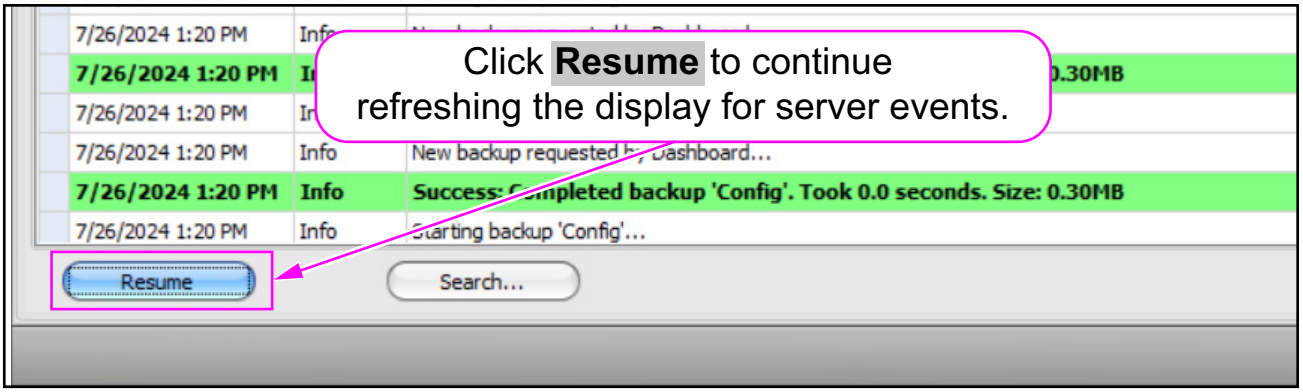


Figure 3-20: Clicking Resume

3.5.2. Text Search in Recent Activity Area

To do a text search for server events in the **Recent Activity** area:

1. Click the **Search** button (Figure 3-21). A **Search Server Activity** window is displayed (Figure 3-22).

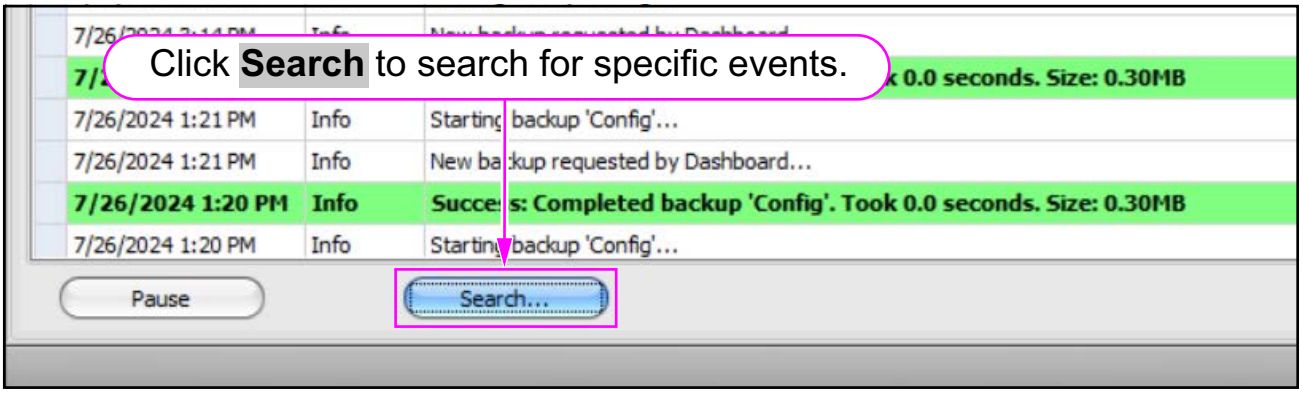


Figure 3-21: Clicking **Search**

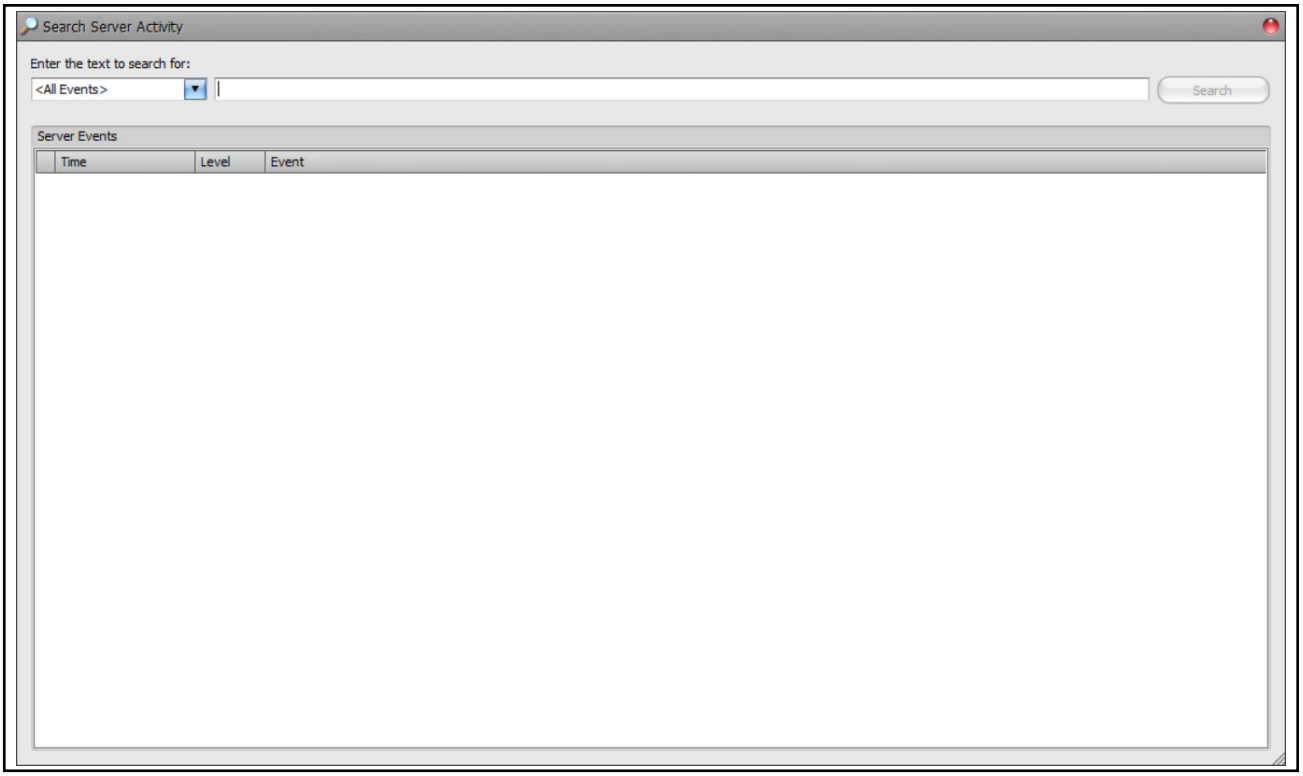


Figure 3-22: Search Server Activity window

2. Select a time interval in which to search for an event (Figure 3-23).

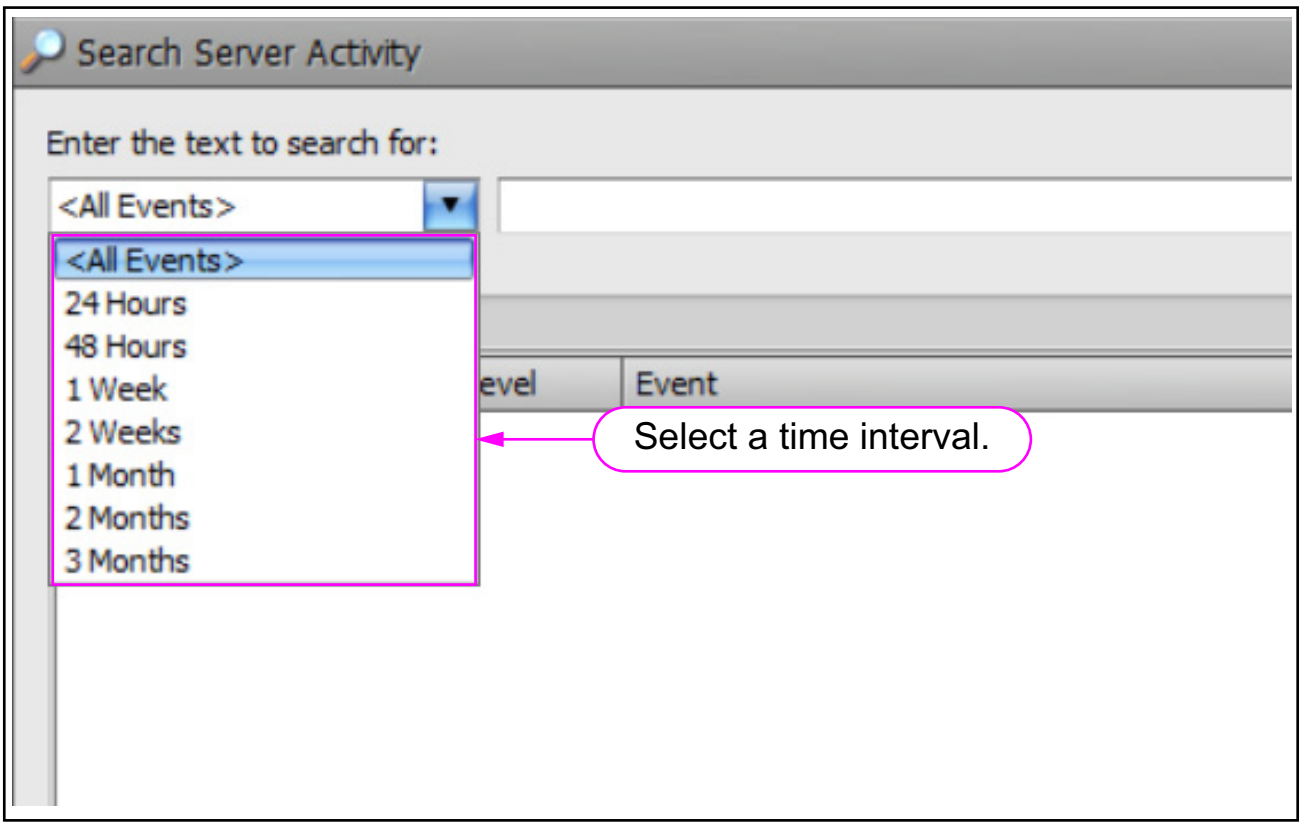


Figure 3-23: Selecting a time interval

3. Type the search text in the textbox at the top and click **Search** (Figure 3-24).

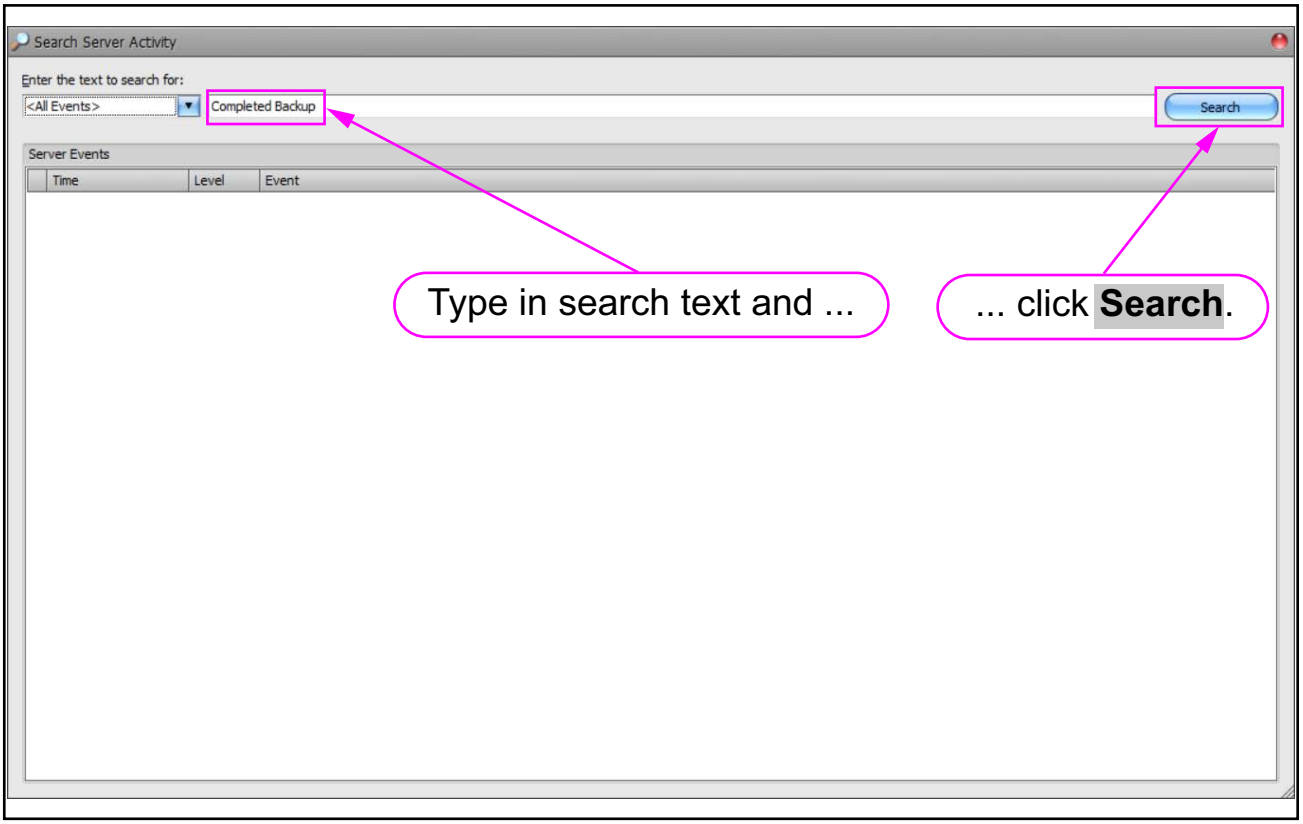


Figure 3-24: Entering the search text

4. The **Server Events** area of the **Search Server Activity** window is populated with the search results (Figure 3-25). Scroll through the results.
5. Click the red button in the upper right to close the **Search Server Activity** window (Figure 3-25).

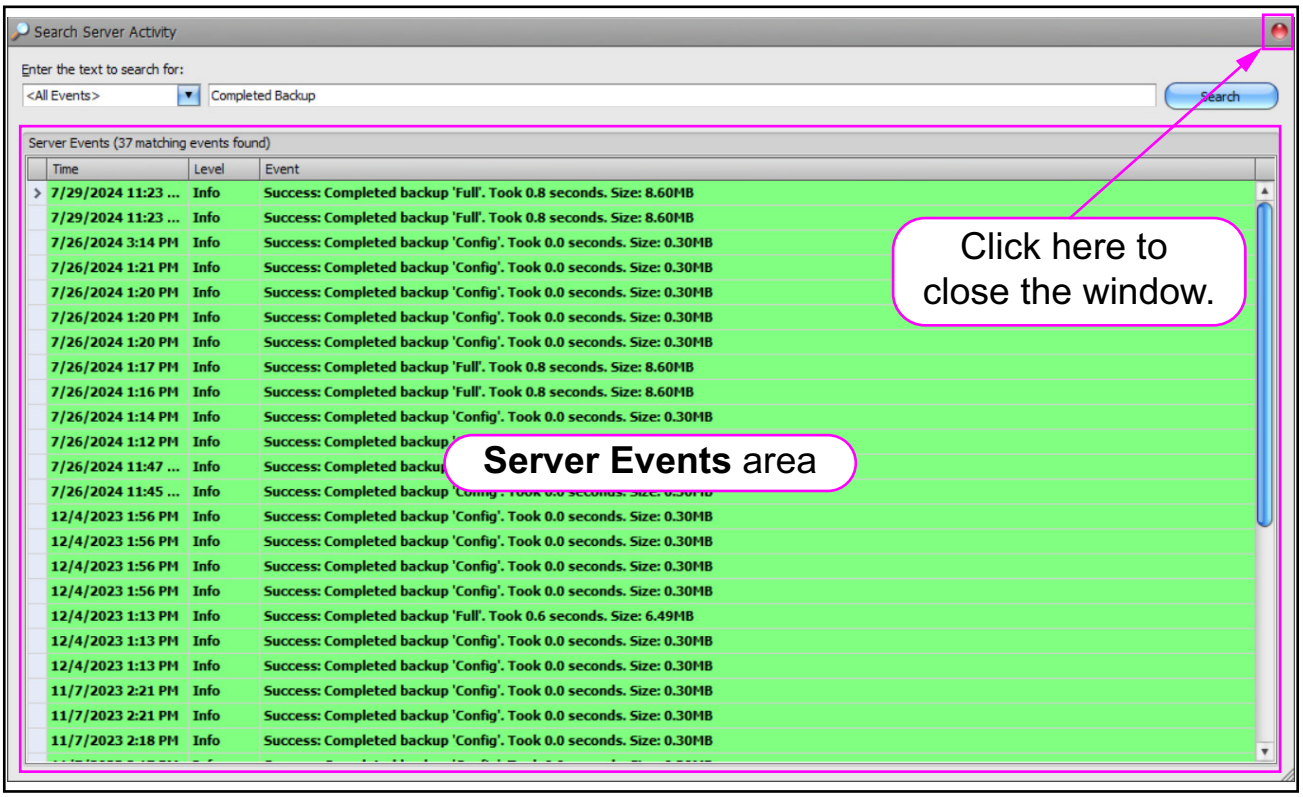


Figure 3-25: Search results

3.6. Alarms Tab

The **Alarms** tab provides the same alarm information shown in the **Server Alarms** area of the **Overview** tab, but with a taller window (Figure 3-26).

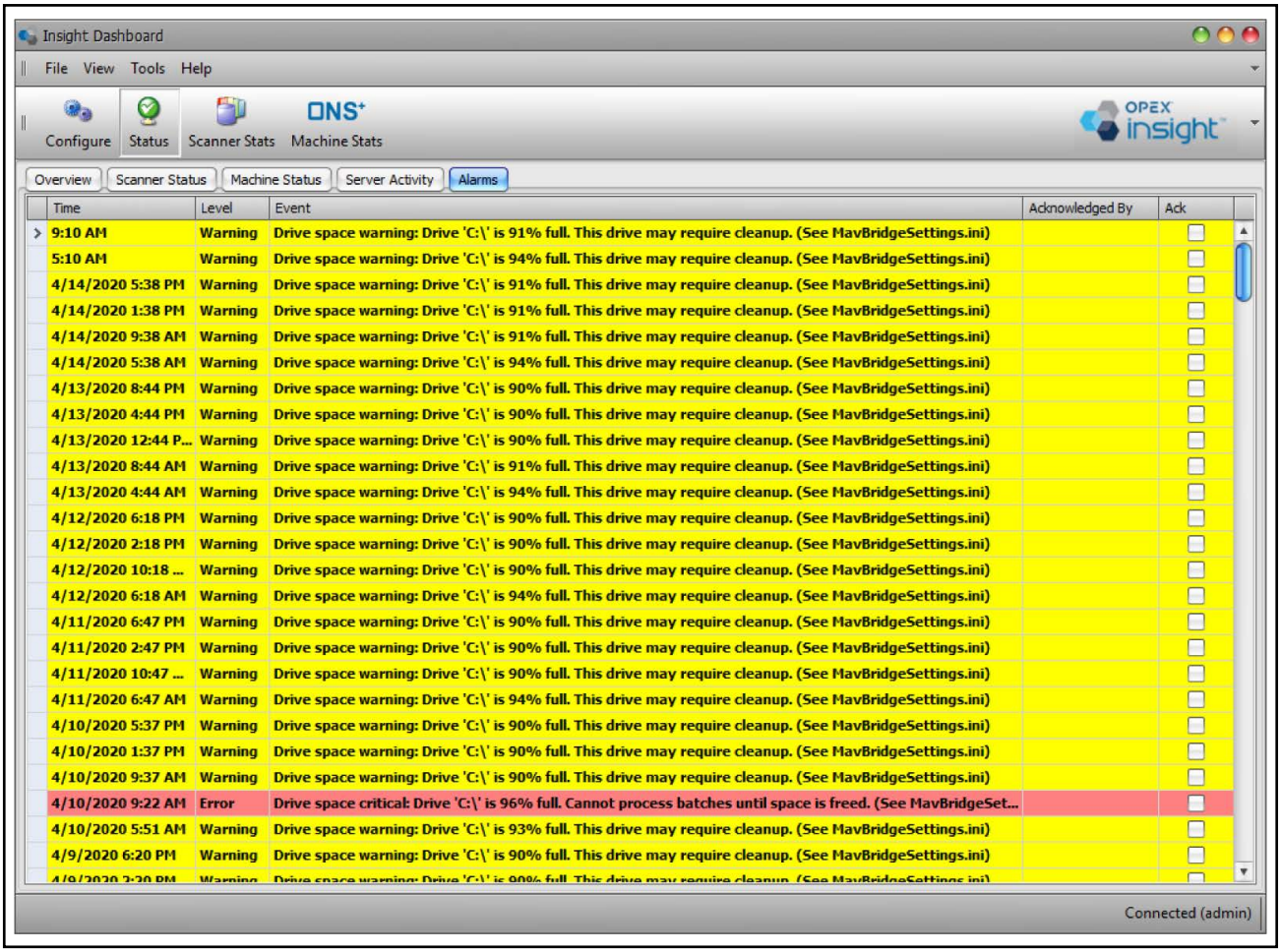


Figure 3-26: Alarms tab

You can work with the alarms displayed here using the same methods as with the alarms shown on the **Overview** tab.

If you acknowledge an alarm on the **Alarms** tab, the alarm will also be displayed as acknowledged in the **Server Alarms** area on the **Overview** tab, and vice versa.

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4. Scanner Stats and ONS+ Machine Stats Modules

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4.1. Overview of Scanner Stats and ONS+ Machine Stats

The Scanner Stats and ONS+ Machine Stats modules provide statistics of operations on the Insight network.

4.1.1. Scanner Stats Module Overview

The Scanner Stats module provides machine-level performance reports for scanners only. They are based on batch log files and machine statistics captured after a batch is processed. The reports show:

- Scanners used during a defined time range.
- Operators who ran the scanners during the defined time range.
- Jobs run on the scanners during the defined time range.
- Batch statistics, such as runtime, number of each page type, number of each page name, etc.

4.1.2. ONS+ Machine Stats Module Overview

Unlike the Scanner Stats module, whose statistics is based on batches, the ONS+ Machine Stats module statistics is derived from OPEX equipment files. The ONS+ Machine Stats module does the following:

- It collects processing data from all of the OPEX machines, not just the scanners.
- It aggregates the data for analysis of the entire operation of multiple machines.
- It bases the machine statistics on the physical outputs, such as number of jams, number of rejects, etc.

4.1.3. Display of the Scanner Stats and ONS+ Machine Stats Modules

The Scanner Stats module and ONS+ Machine Stats module both have the same basic display areas. The display is divided into these areas (Figure 4-1):

1. Time Range.
2. Filters: Machines, Operators, Jobs, and Advanced Filters
3. Selection Summary: Summary of results.
4. Report Settings.
5. Export and Print
6. Types of Reports.
7. Selection Summary Display Area.

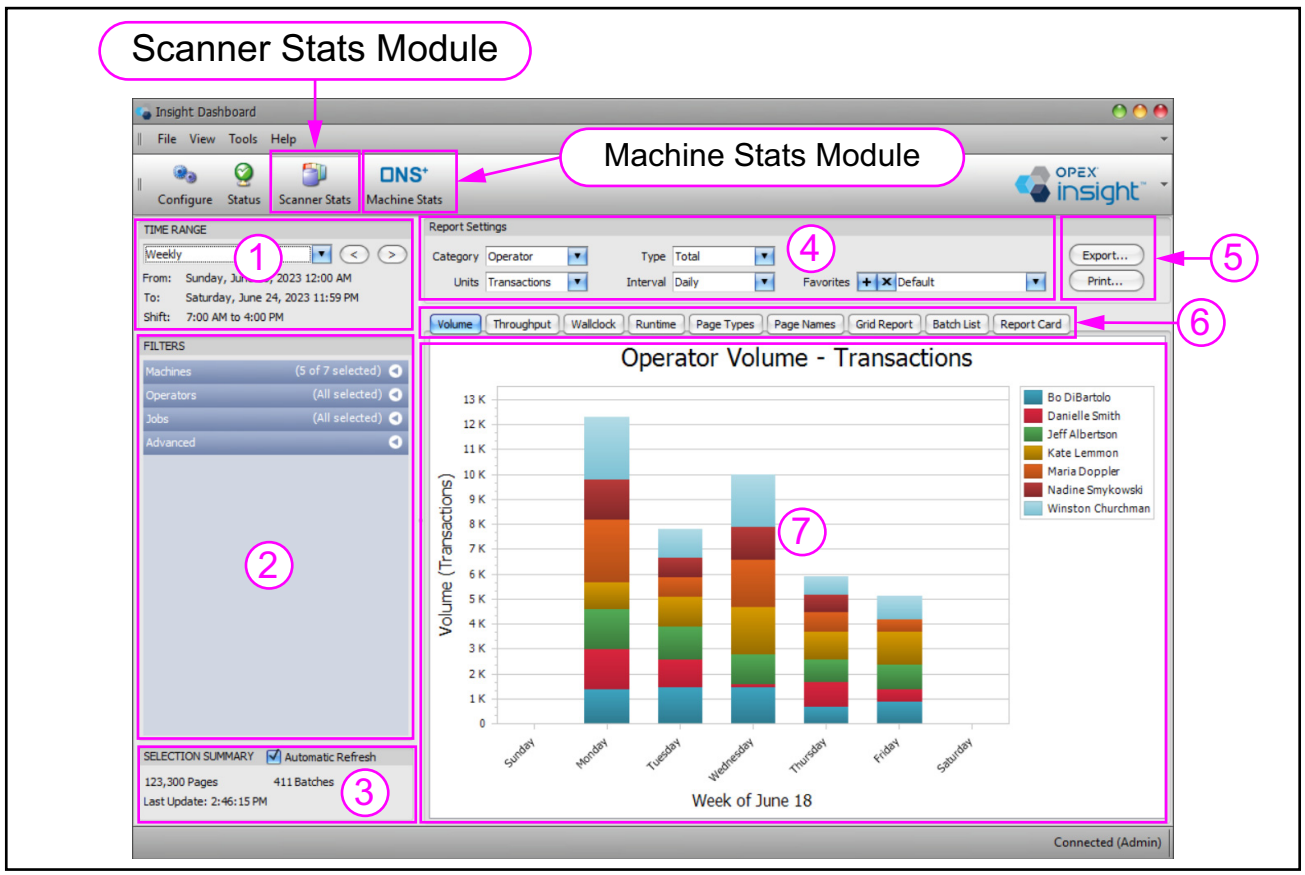


Figure 4-1: Display Areas

4.2. Setting the Report Time Range

Before viewing any of the Scanner Stats Module reports, you must use the **TIME RANGE** area to specify the time range that will be covered by the reports (Figure 4-2).

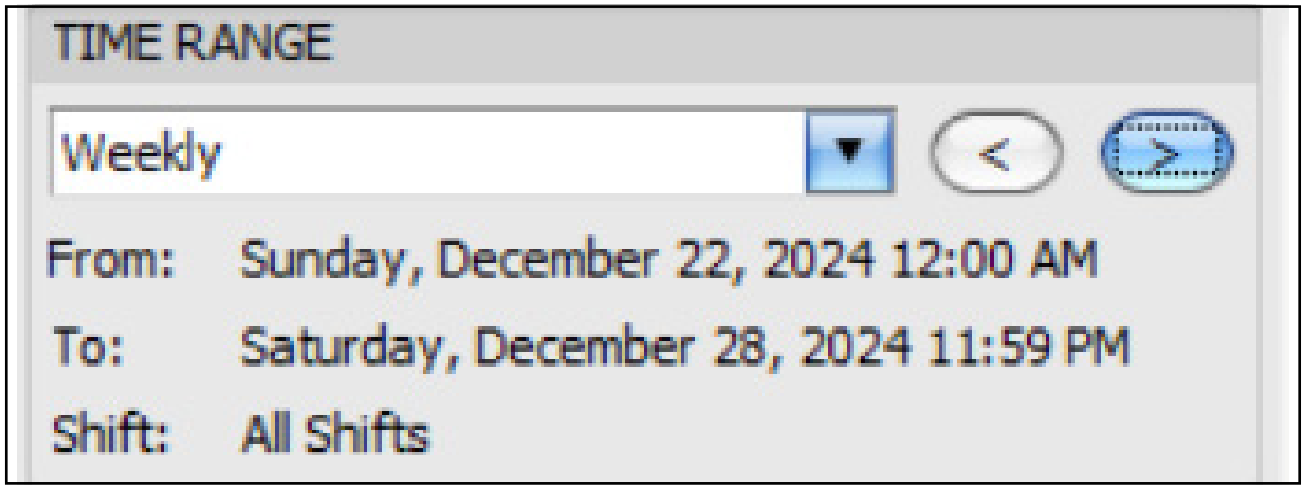


Figure 4-2: TIME RANGE Area

1. Use the **TIME RANGE** drop-down list to select a time range (Figure 4-3). Choices are: **Daily**, **Weekly**, **Monthly**, **Yearly**, or **Custom**.
2. Use the left and right arrow buttons to step back and forth in the selected increment, such as stepping back or forward a week.

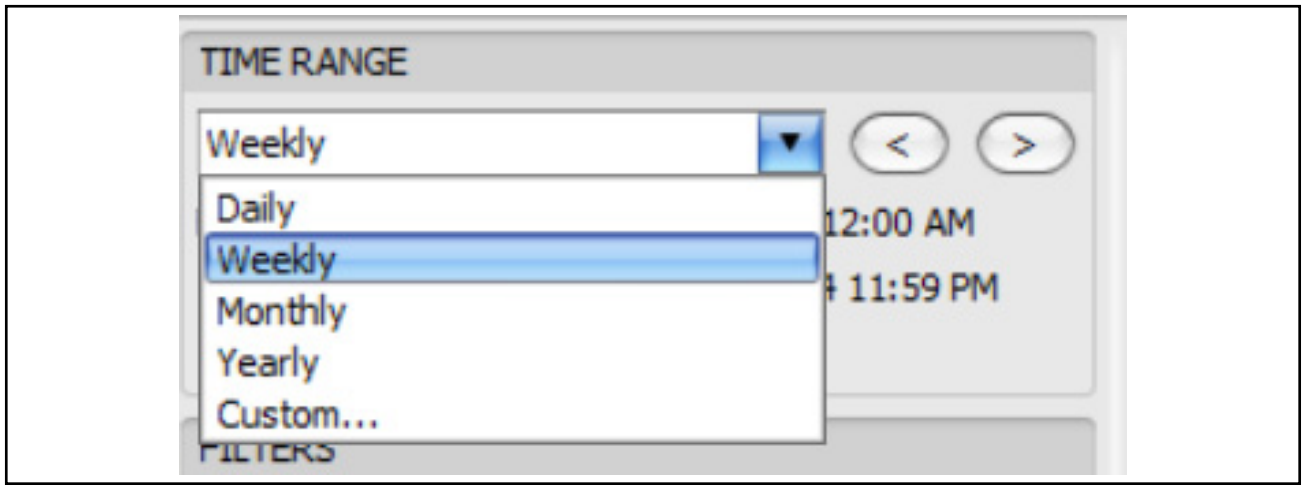


Figure 4-3: TIME RANGE drop-down list

4.2.1. Choosing a Custom Time Range

1. You can select a customized time range in one of two ways (Figure 4-4):
   a. You can select **Custom** from the drop-down list.
   b. You can click on the **From** date or the **To** date.

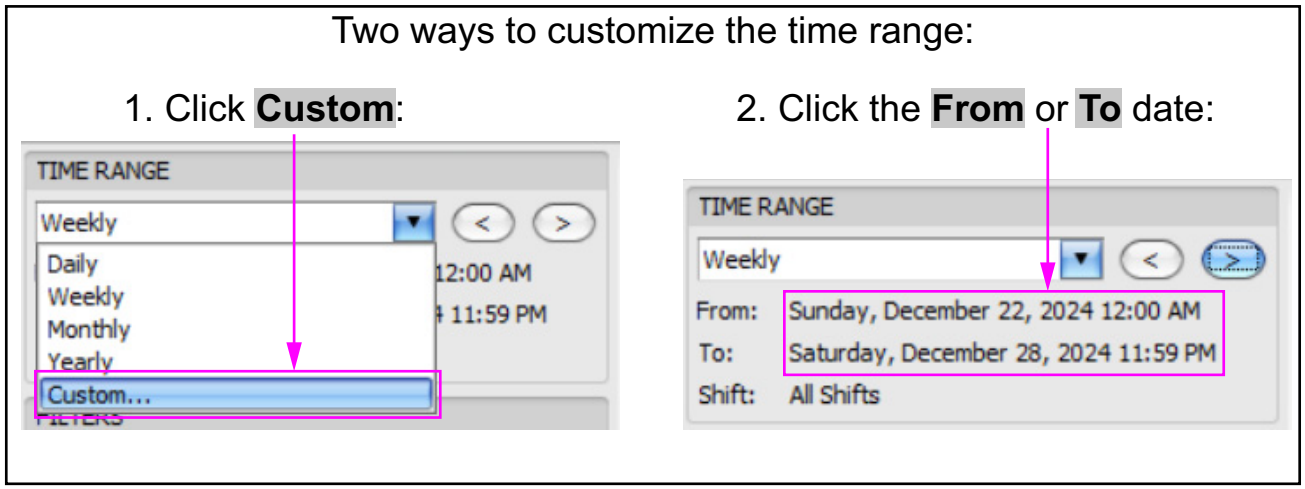


Figure 4-4: Two ways to open Custom Time Range window

The Customize Time Range window opens.

2. For the start and end dates, either type in a time of day or click the up and down arrows next to each time setting to increment the time (Figure 4-5).

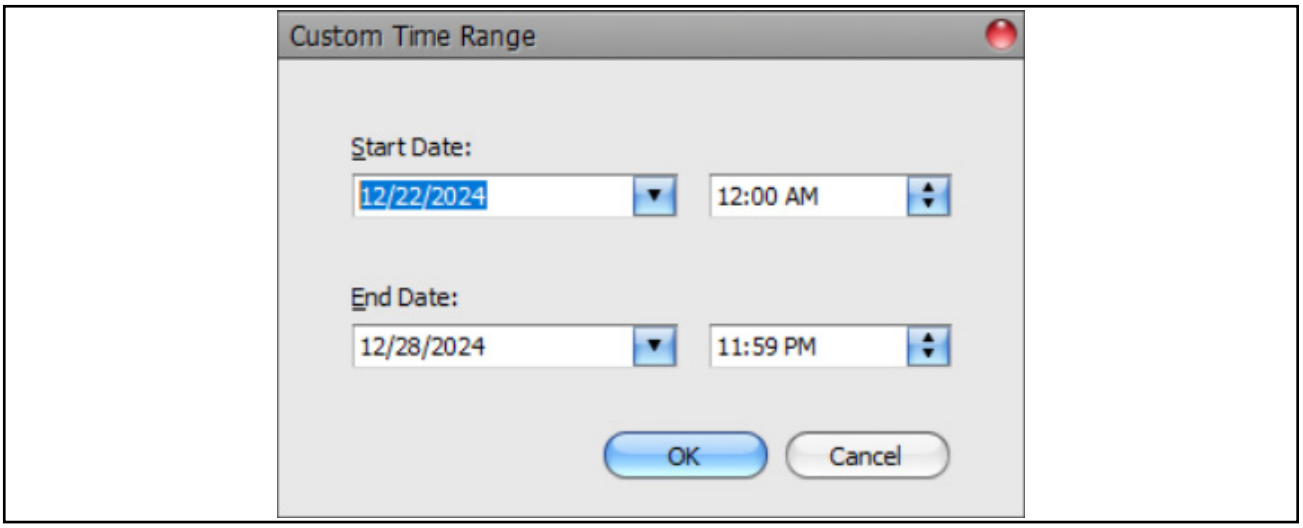


Figure 4-5: Custom Time Range window

3. Enter a start and end date, or click the drop-down arrow next to each date to use a calendar for date selection (Figure 4-6).

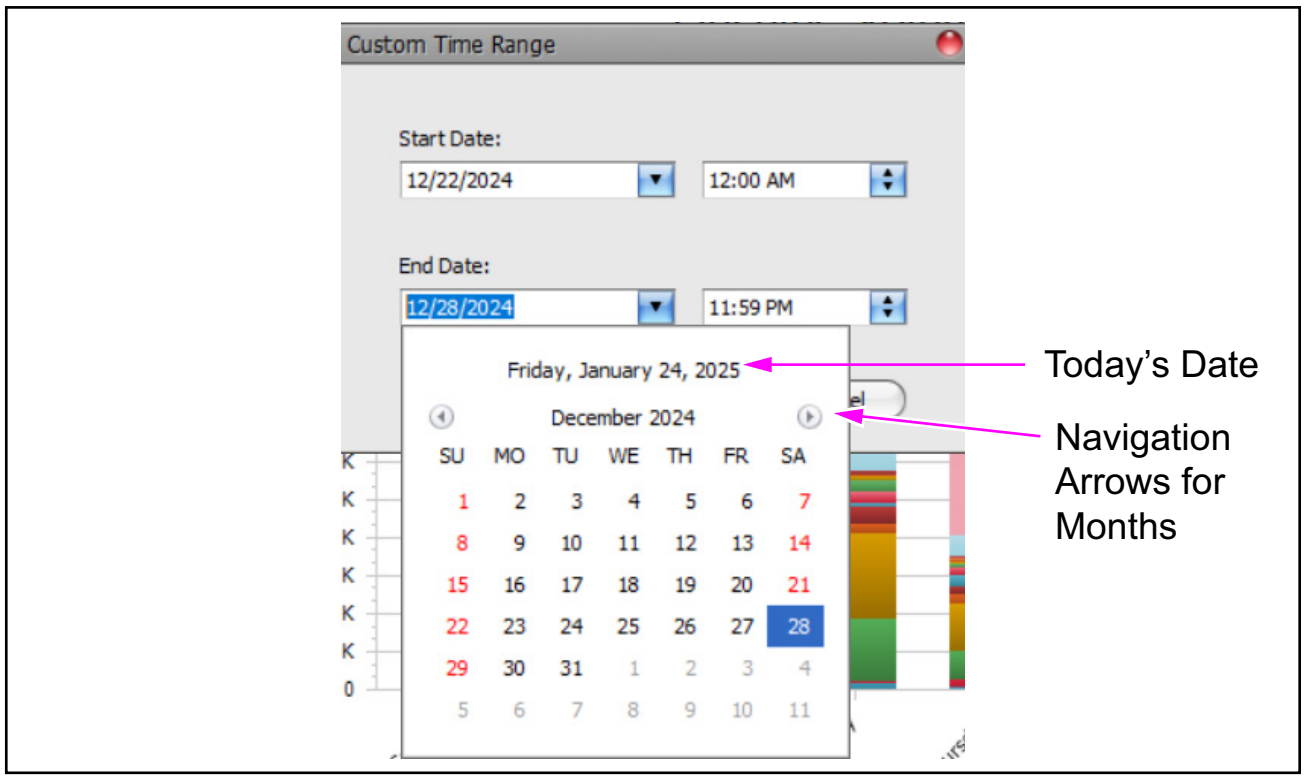


Figure 4-6: Using a calendar to select a date

4. Click **OK** to save the changes (Figure 4-7).

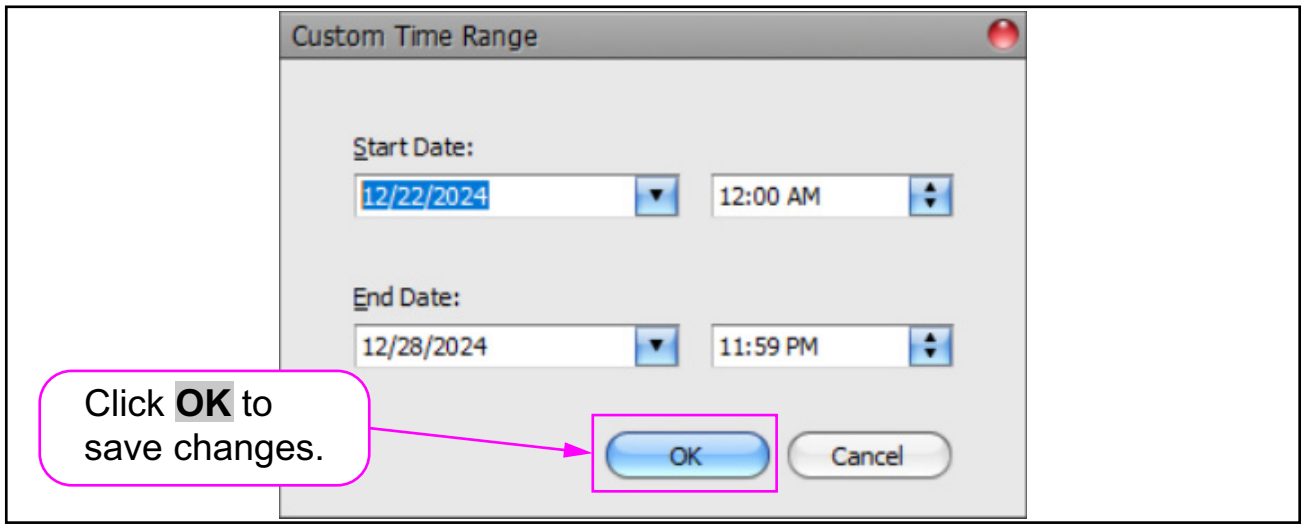


Figure 4-7: Saving the custom time range

4.2.2. Setting the Shift

1. To set the shift, click on the field towards the right of **Shift**. A **Shift Time Selection** window opens (Figure 4-8)
2. Use the **Shift Time Selection** window to select a shift.
   a. Select the `Search All Shifts` radio button to include all of the shifts for each day in the reports.
   b. Alternatively, select the `Search Specific Shift Times` radio button and enter a start and stop time for the shift.
3. Click `OK` to accept the changes.

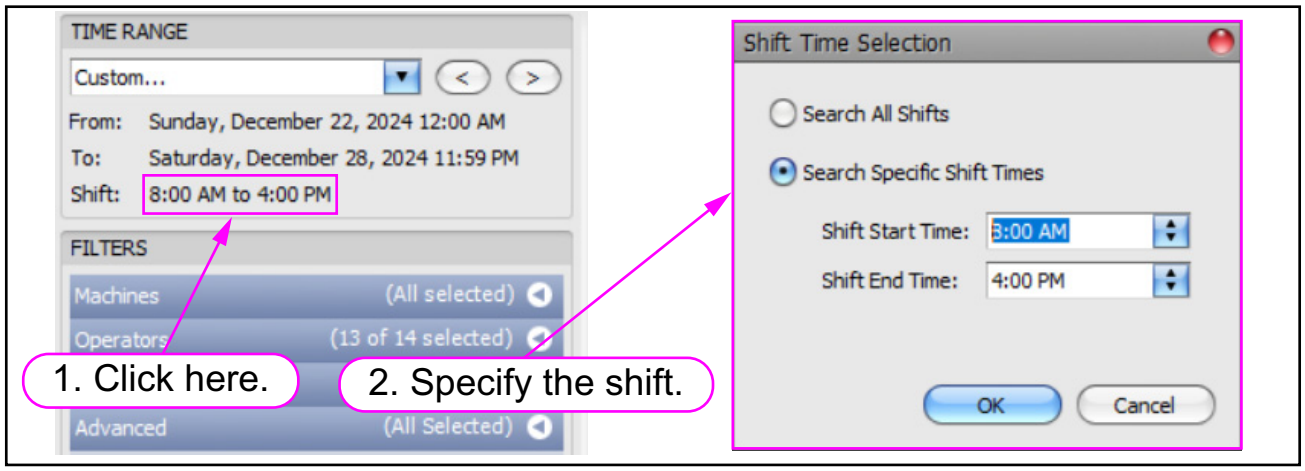


Figure 4-8: Shift Time Selection Window

4.3. Configuring the Report Filters

Use the **Filters** area to select which Machines, Operators, and Jobs will be in the reports.

4.3.1. Basic Filter Settings

1. To open a filter, click on the drop-down arrow to expand the display of the list of items (Machines, Operators, and Jobs) of interest (Figure 4-9).
2. Check the boxes next to the items you want to include in the reports.

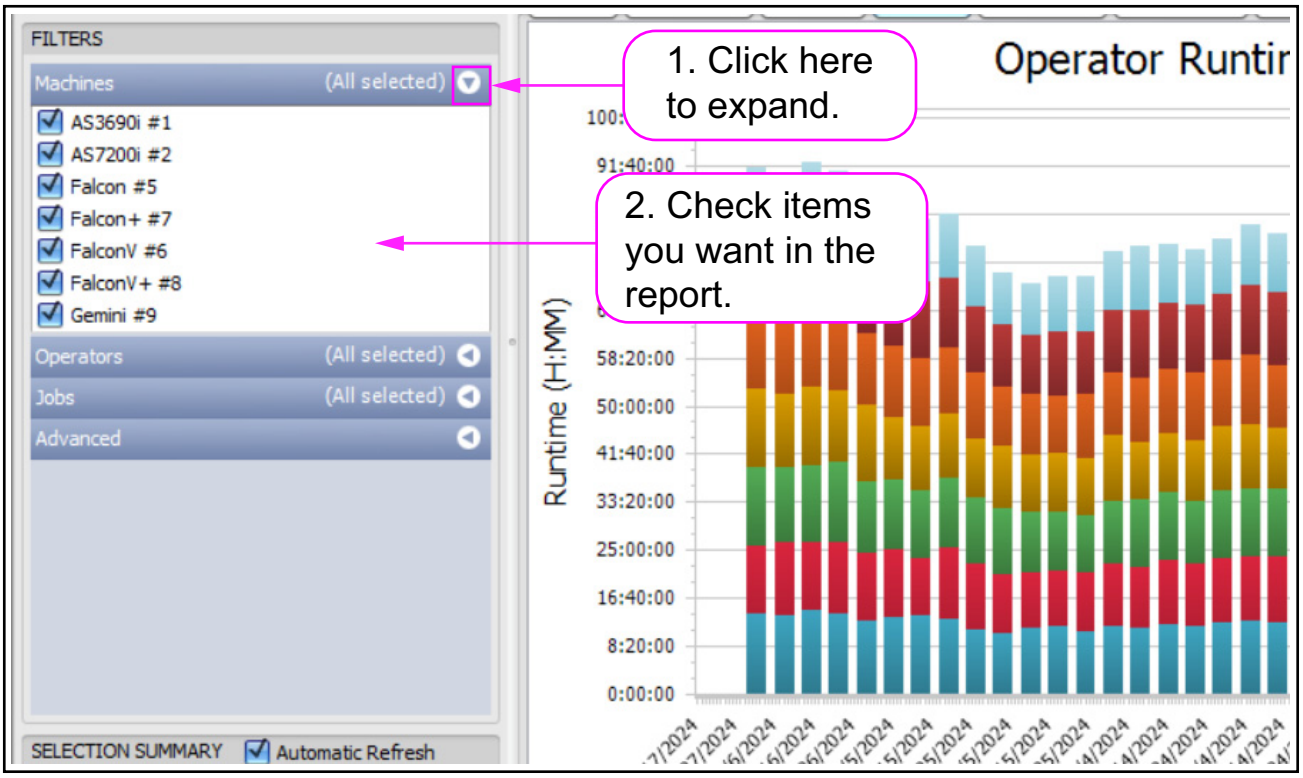


Figure 4-9: Selecting filters

3. If there are too many items to be displayed, use the up/down arrows and scrollbar on the right to scroll through the list (Figure 4-10).

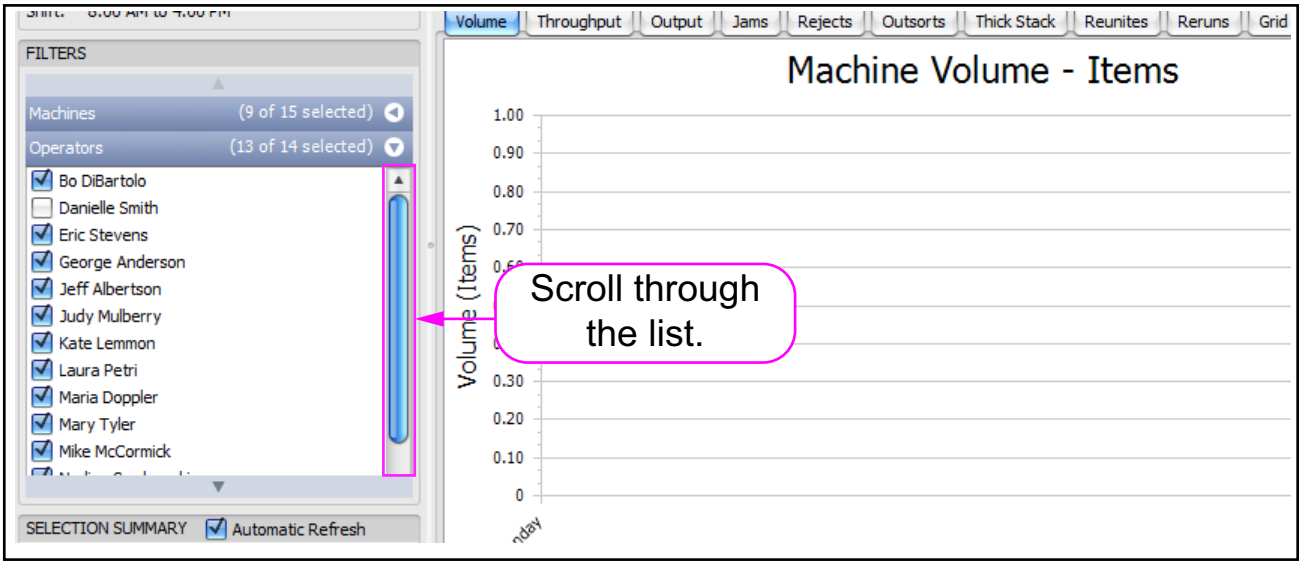


Figure 4-10: Scrolling through the item list

4. Use the arrows above and below a group of items to scroll to the previous or next group of items (Figure 4-11).

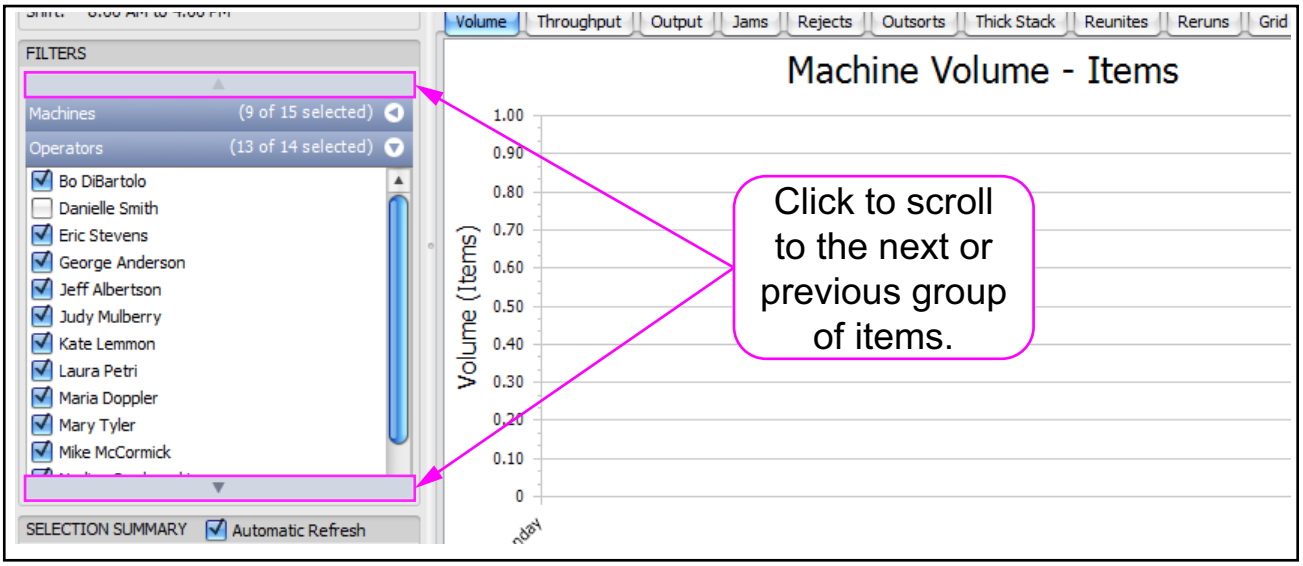


Figure 4-11: Scrolling to another group of items

4.3.2. Advanced Filter Settings

The Advanced filter allows you to further specify what type of data you want in your reports.

4.3.2.1. Advanced Filter Settings for the Scanner Stats Module

1. Click on the drop-down arrow to open the **Advanced** filter heading (Figure 4-12).
2. Use the **Batch Type** drop-down arrow (Figure 4-12) to choose to display data of either the “Physical Batches” or the “Virtual Batches.”

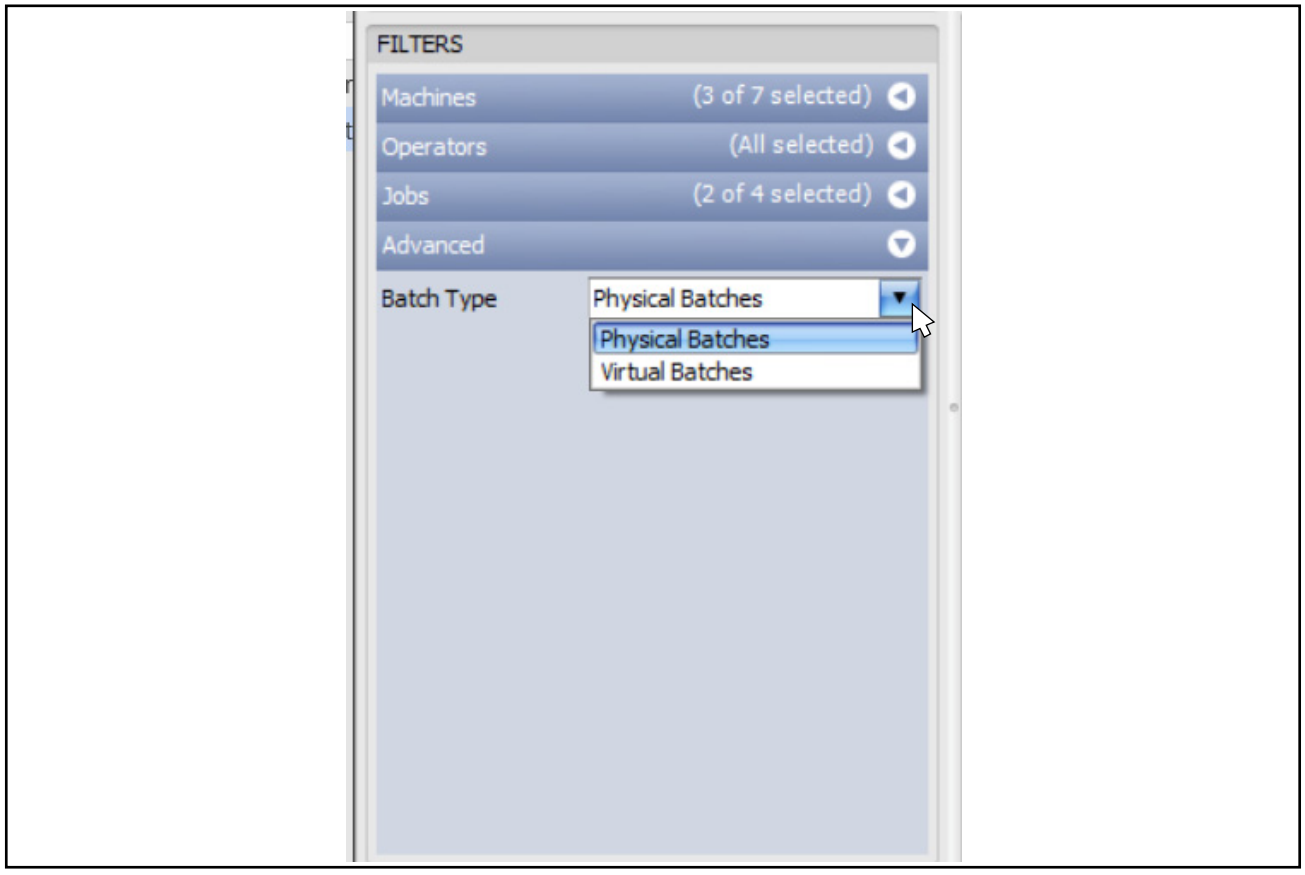


Figure 4-12: Advanced Filter for the Scanner Stats Module

4.3.2.2. Advanced Filter Settings for the ONS+ Machine Stats Module

1. Click on the drop-down arrow to open the **Advanced** filter heading.
2. Use the **Machine Operation** drop-down arrow to select the type of machine operation data (Figure 4-13).

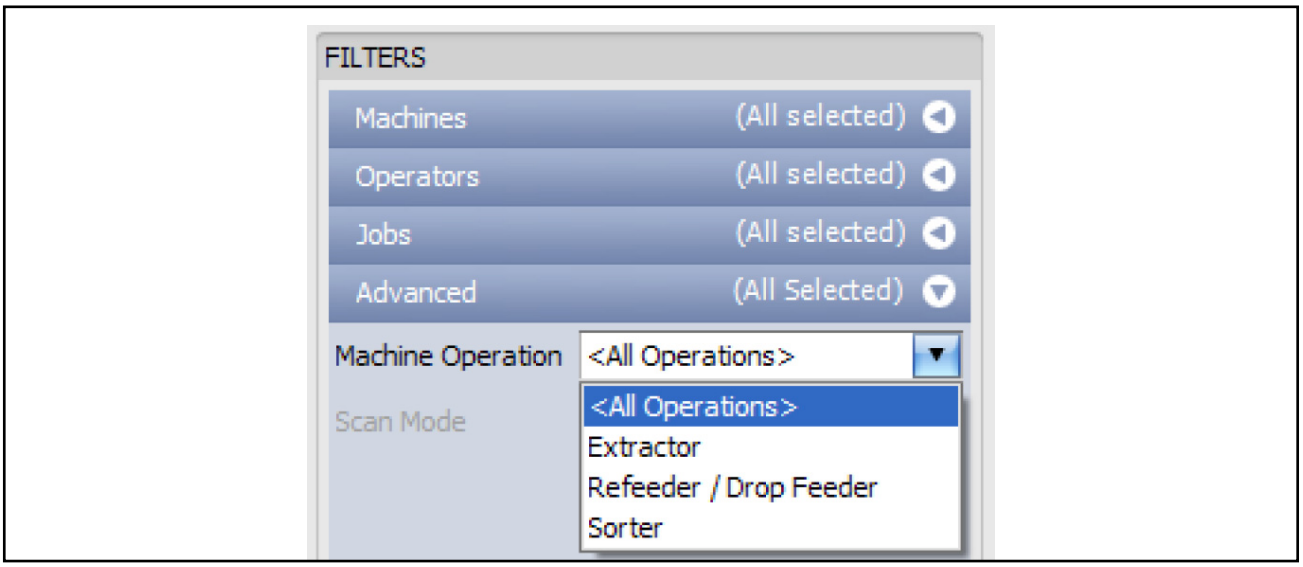


Figure 4-13: Advanced Filter for the ONS+ Machine Status Module

a. If you choose **`Extractor`**, select one of three scan modes (Figure 4-14):

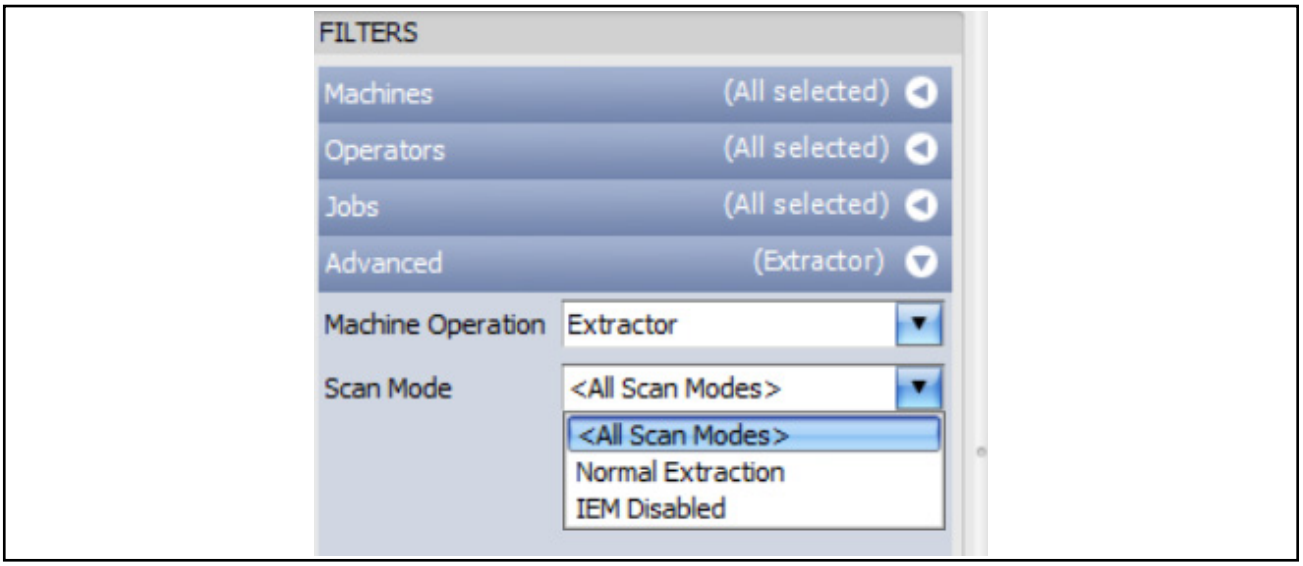


Figure 4-14: Extractor Scan Mode choices

b. If you select **`Refeeder / Drop Feeder`**, select the batch type scan mode (Figure 4-15).

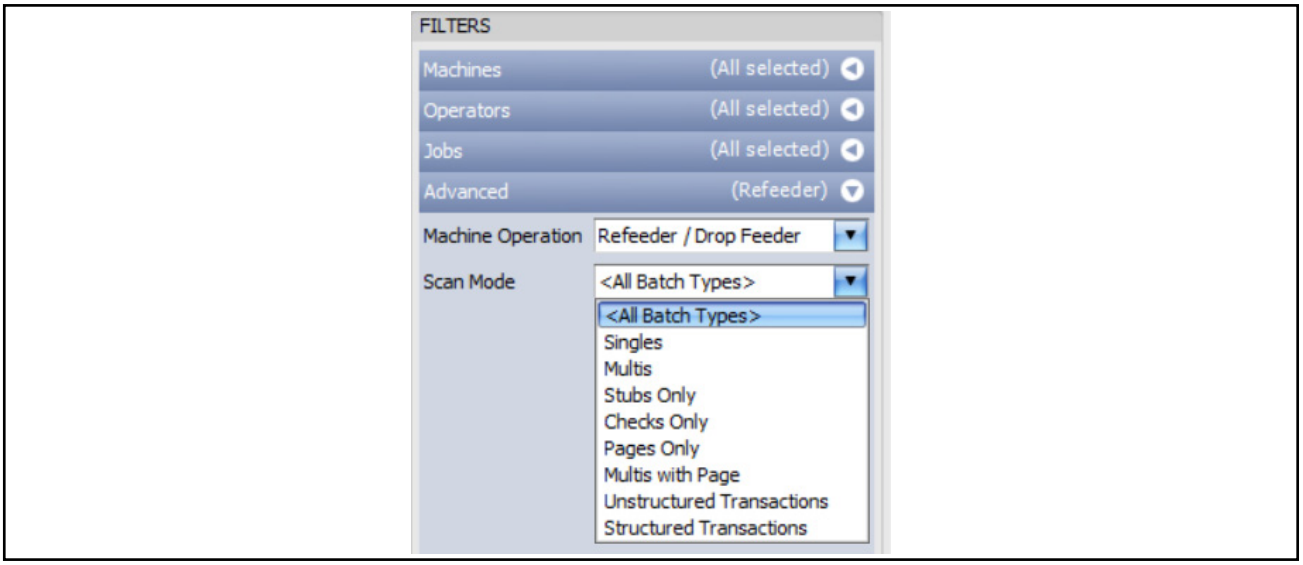


Figure 4-15: Refeeder / Drop Feeder operation Scan Mode choices

4.3.3. Filter Tools Menu

With a filter open, right-click on the filter heading. The filter tools menu opens (Figure 4-16).

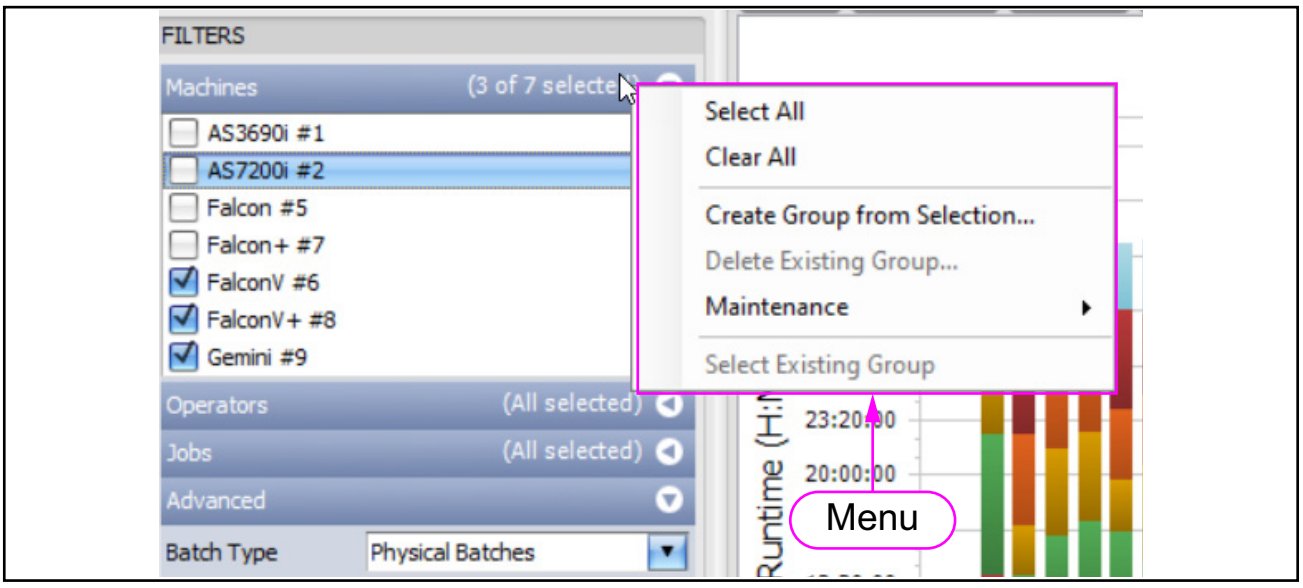


Figure 4-16: Filter Tools Menu

4.3.3.1. Select All or Clear All

- Click **`Select All`** to select all of the machines in the list.
- Click **`Clear All`** to deselect all of the machines in the list.

4.3.3.2. Creating a Filter Group

The following steps for the machines filter also apply to the other filters (Operators and Jobs).

1. Right-click on the **Machines** filter heading and select **Clear All** to deselect all machines.
2. Check the machines you want included in the group.
3. Right-click on the **Machines** filter heading again. The filter tools menu opens (Figure 4-17).
4. In the filter tools menu, click **Create Group from Selection...** (Figure 4-17). The **Create New Devices Group** dialog box opens (Figure 4-18).

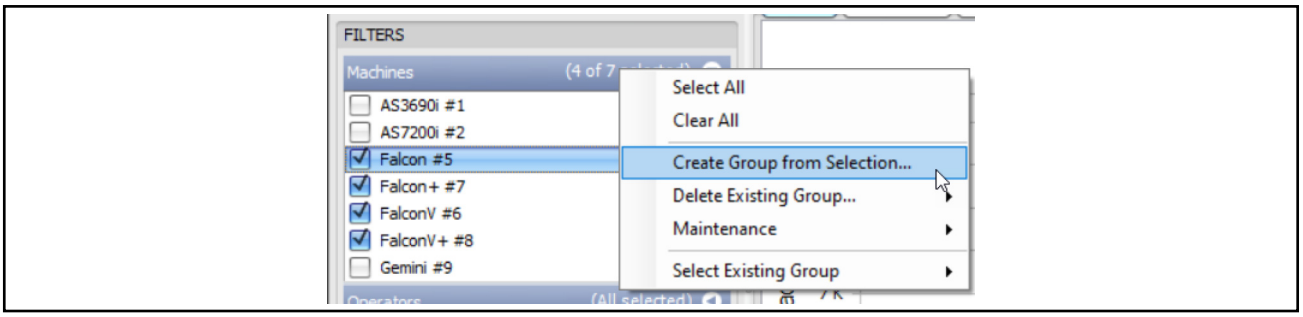


Figure 4-17: Create Group from Selection

5. Enter a name for the group in the **Group Name** field, and click the **OK** button. A group for the machines you selected will be created under the name you entered.

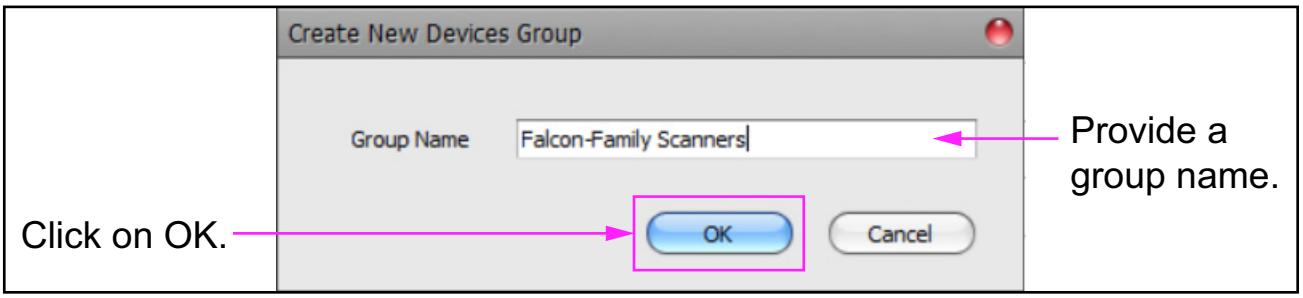


Figure 4-18: Naming the Group

4.3.3.3. Selecting a Filter Group

The following steps for the machines filter also apply to the other filters.

1. With a filter open, right-click on the filter heading to open the filter tools menu.
2. In the filter tools menu, hover your cursor over **Select Existing Group**. A fly out menu opens.
3. In the fly out menu, click on your desired group (Figure 4-19).

   The machines included in the group you selected become checked, and all other machines become unchecked.

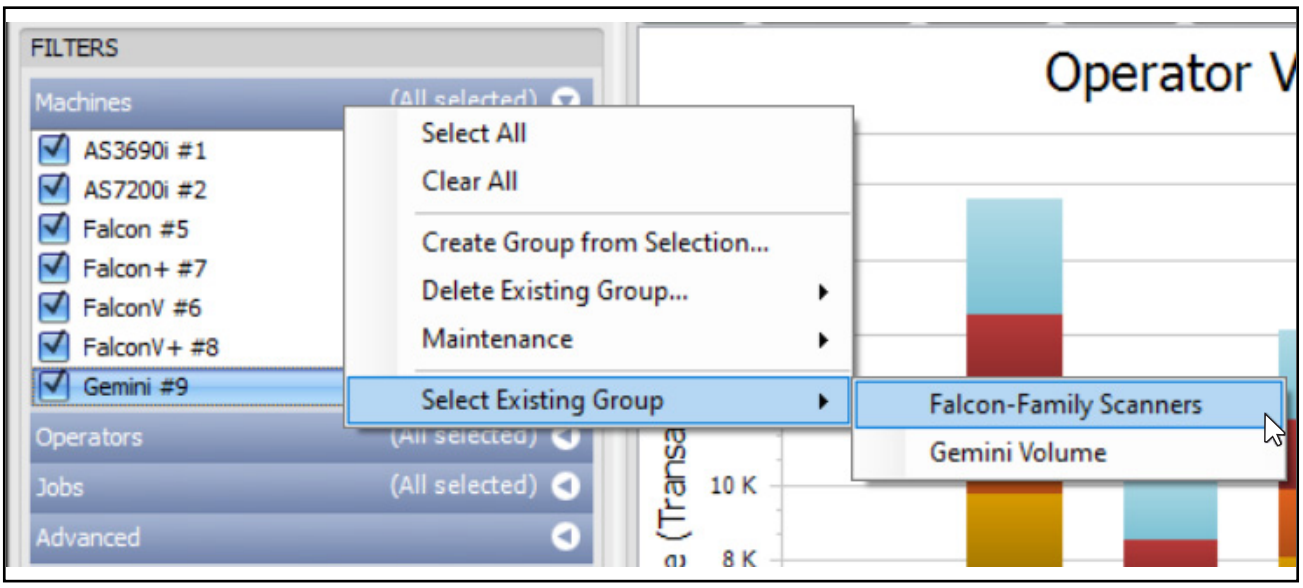


Figure 4-19: Selecting a Filter Group

4.3.3.4. Deleting a Filter Group

1. With a filter open, right-click on the filter heading to open the filter tools menu.
2. In the filter tools menu, hover your cursor over **Delete Existing Group**. A fly out menu will open.
3. In the fly out menu, click on the group you want to delete.

A **Confirm Delete** window opens. Click the **OK** button to delete the group.

4.3.3.5. Rename a Machine, Operator, or Job

1. Right click on the item you want to rename, such as an operator (Figure 4-20).
2. Click on the selection to rename the item, such as **`Rename Operator`** (Figure 4-20).

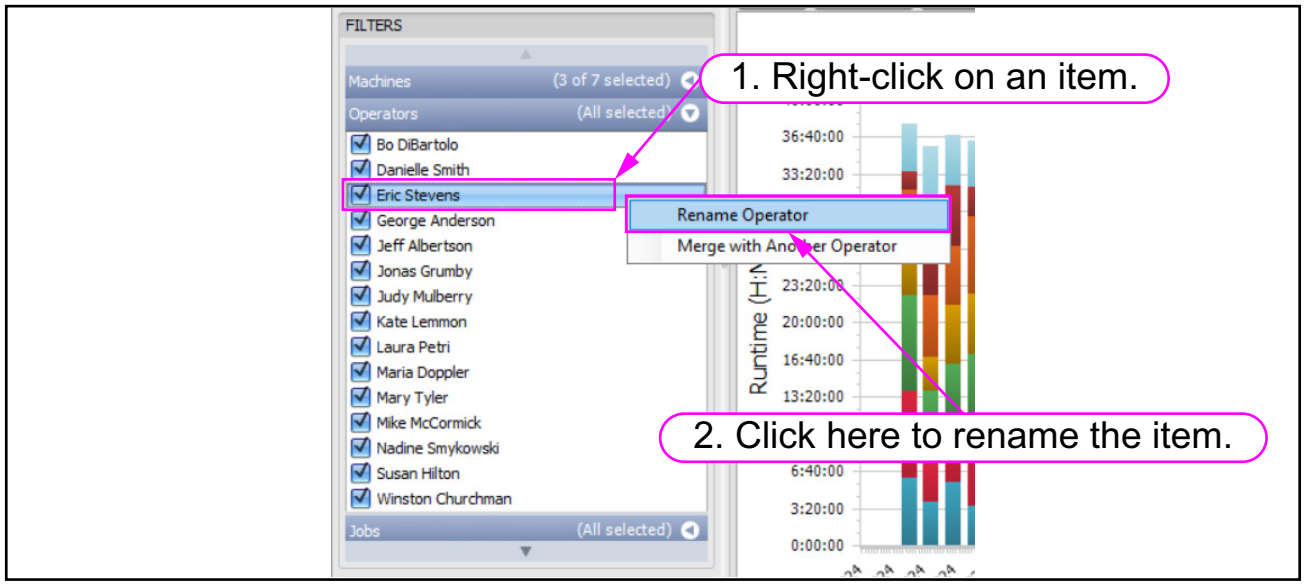


Figure 4-20: Renaming an item

3. A **Rename Item** window appears. Change the name and click **`OK`** (Figure 4-21).

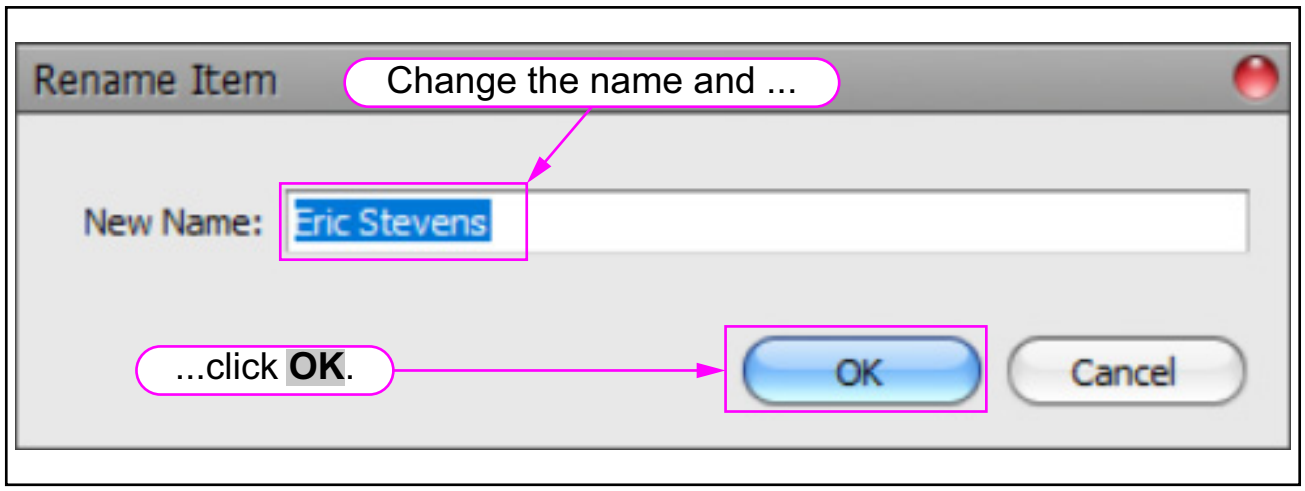


Figure 4-21: Changing the item's name

4.3.3.6. Permanently Merging Data

The following steps for the machines filter also apply to the other filters.

1. Right-click on the filter heading, such as the **Machines** filter tools menu.
2. In the filter tools menu, hover your cursor over **Maintenance**. A fly out menu opens (Figure 4-22).
3. Click on "**Merge Multiple Machines Together...**" (See Figure 4-22.)

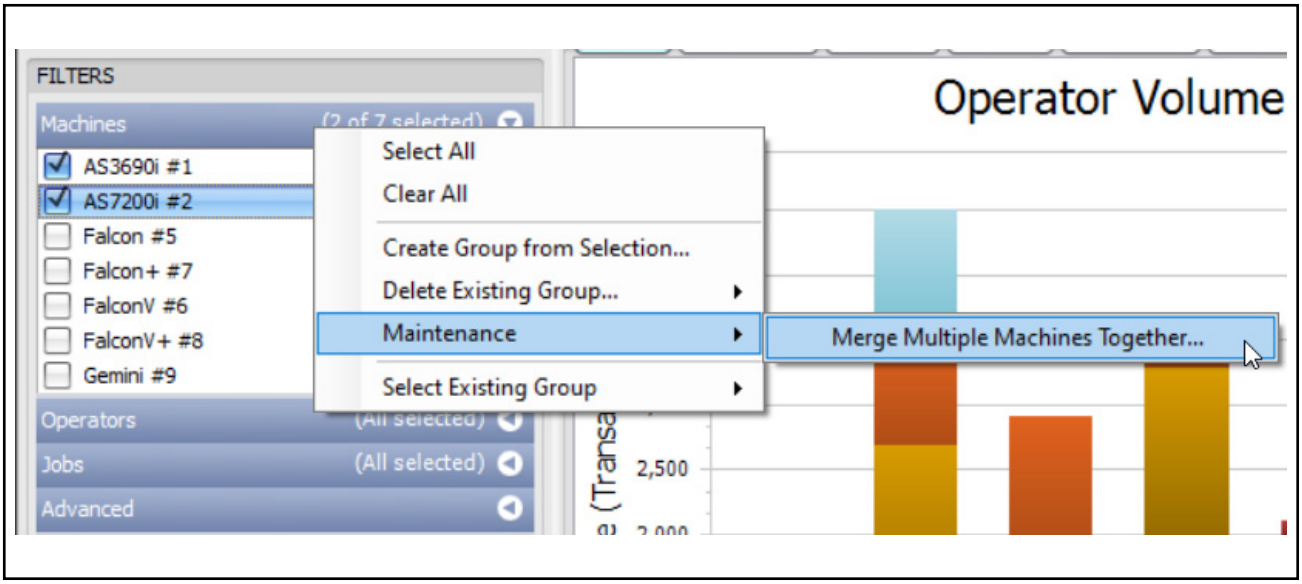


Figure 4-22: Merge Machines

4. The **Merge Multiple Machines** window pops up (Figure 4-23). Click on the items to merge. (Hold down the **Ctrl** key while clicking on multiple items. Alternatively, hold down the **Shift** key while clicking on multiple adjacent items.)

5. Under "**Destination**," use the drop-down list to select the destination item name into which the data will be merged (Figure 4-23).

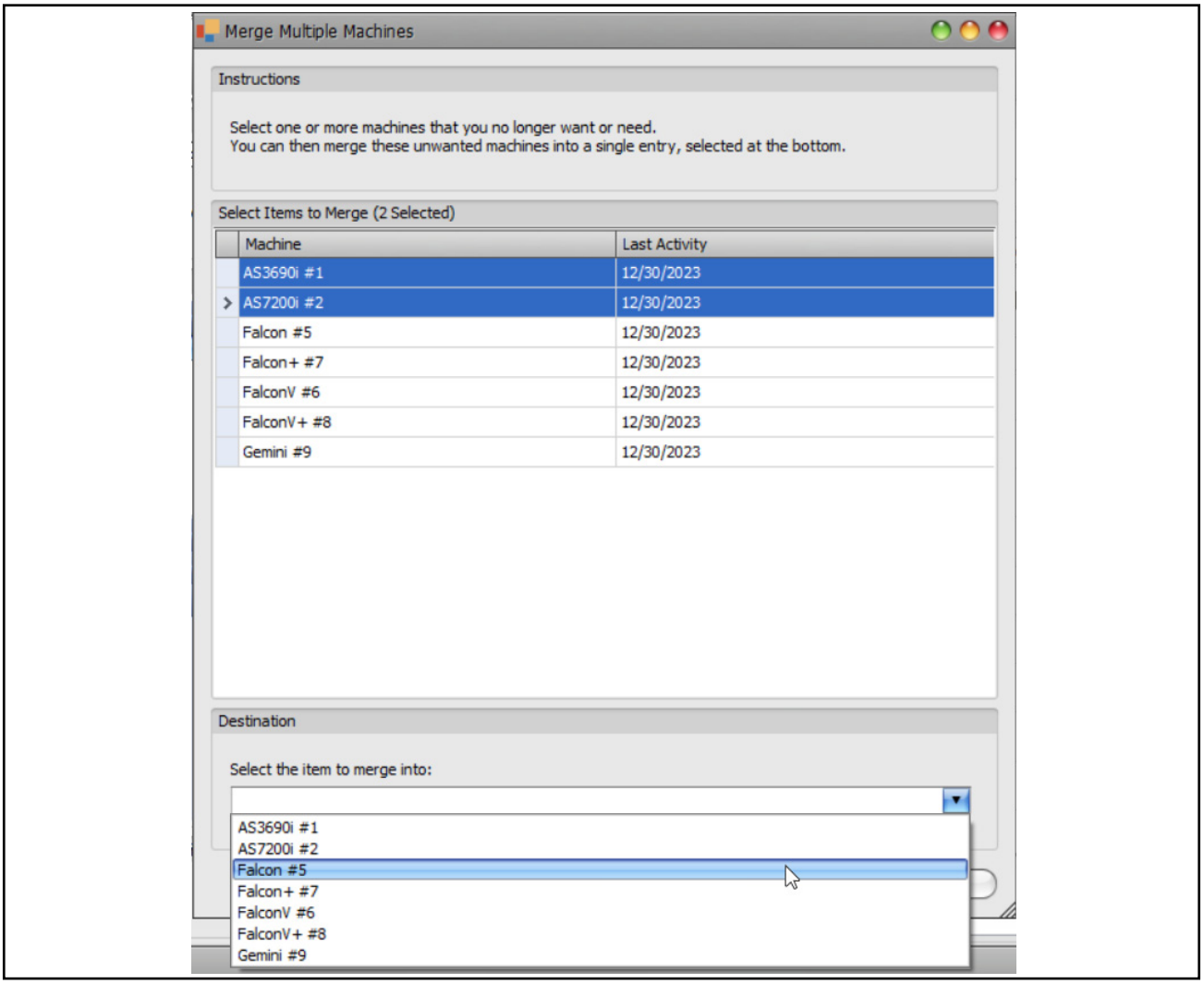


Figure 4-23: The "Merge Multiple Machines" window

6. Click on the **Merge** button to continue. A confirmation window pops up, warning you that this merging of data cannot be undone (Figure 4-24).
7. Click on the **OK** button to complete the merging operation or **Cancel** to cancel the merging operation.

Note: Once such data is merged, it cannot be undone.

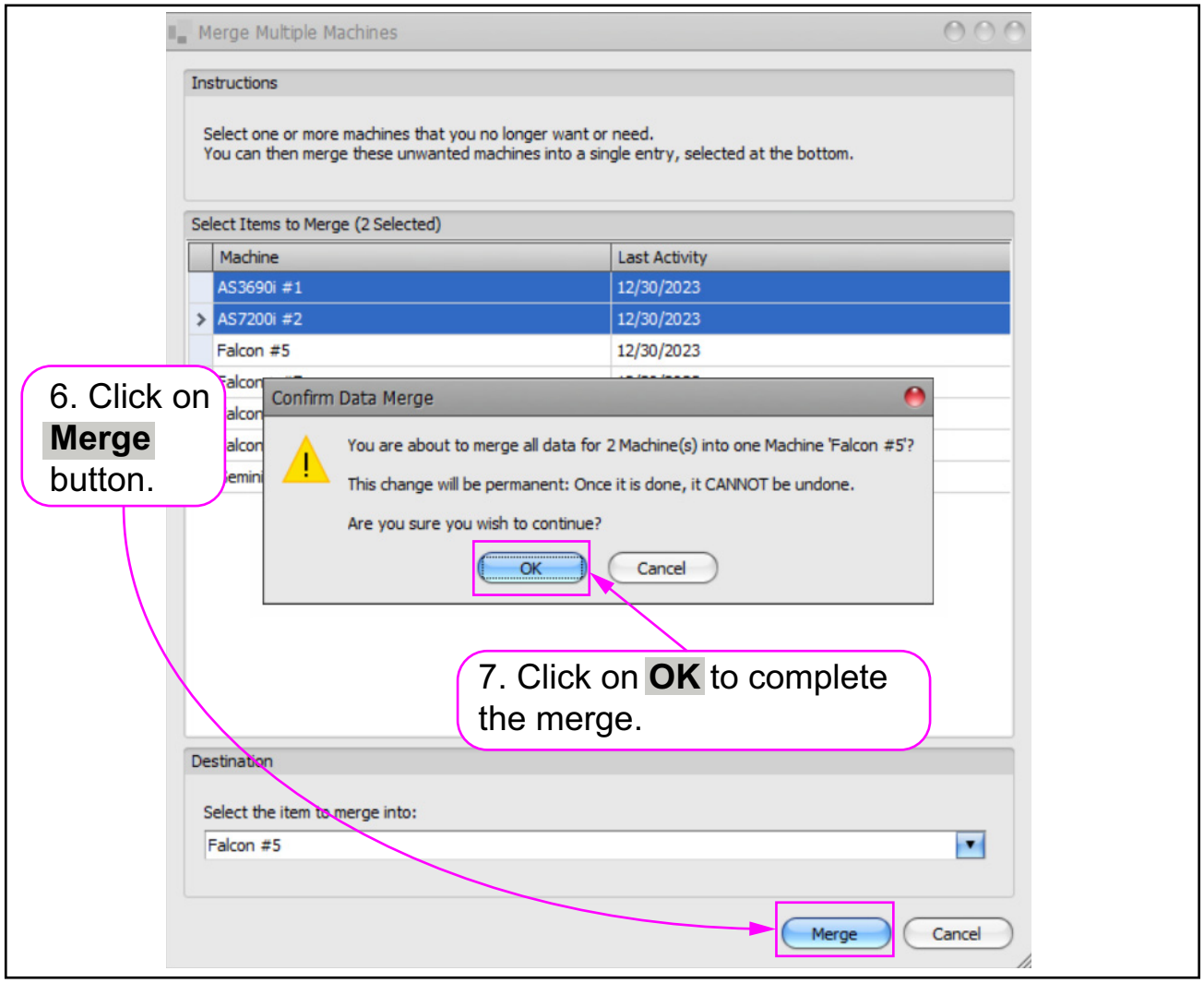


Figure 4-24: Confirmation window after clicking on "Merge" button.

4.3.4. Setting a Job Target Rate

The Target Rate is the expected throughput in pieces per hour for each Job. Here are the steps to set the Target Rate:

1. Go to the **ONS+ Machine Stats** module (Figure 4-25).
2. Click the **Type** drop-down arrow and set it to **Comparison** or **Individual**.

Note: *The Target Rate display will not work if* **Type** *is not set to* **Comparison** or **Individual**.

3. Select the **Throughput** tab.

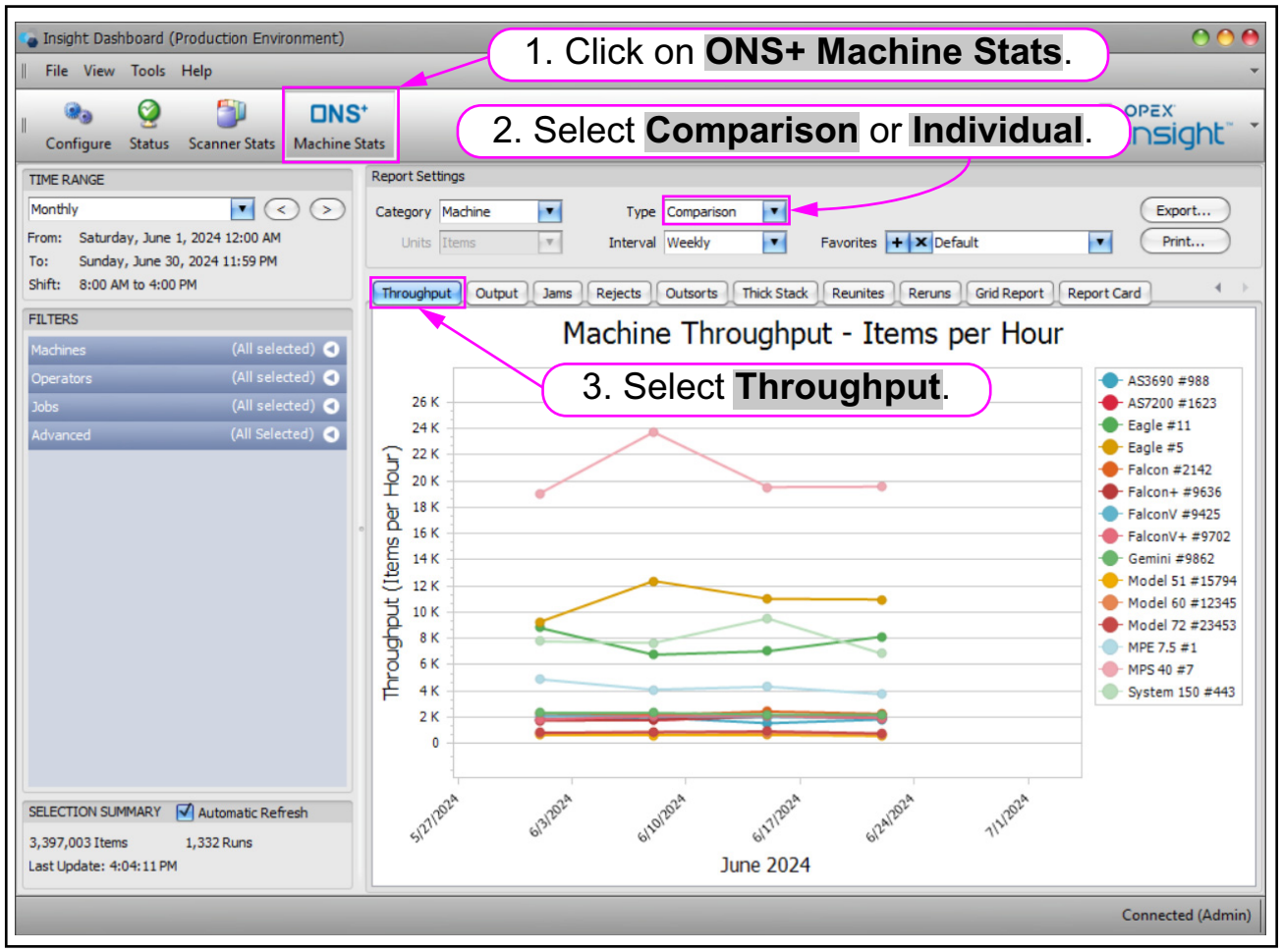


Figure 4-25: Setting the Type

4. At **Filters** on the left, expand **Jobs** (Figure 4-26).
5. Right-click on a Job.
6. Click **Set Target Rate**.

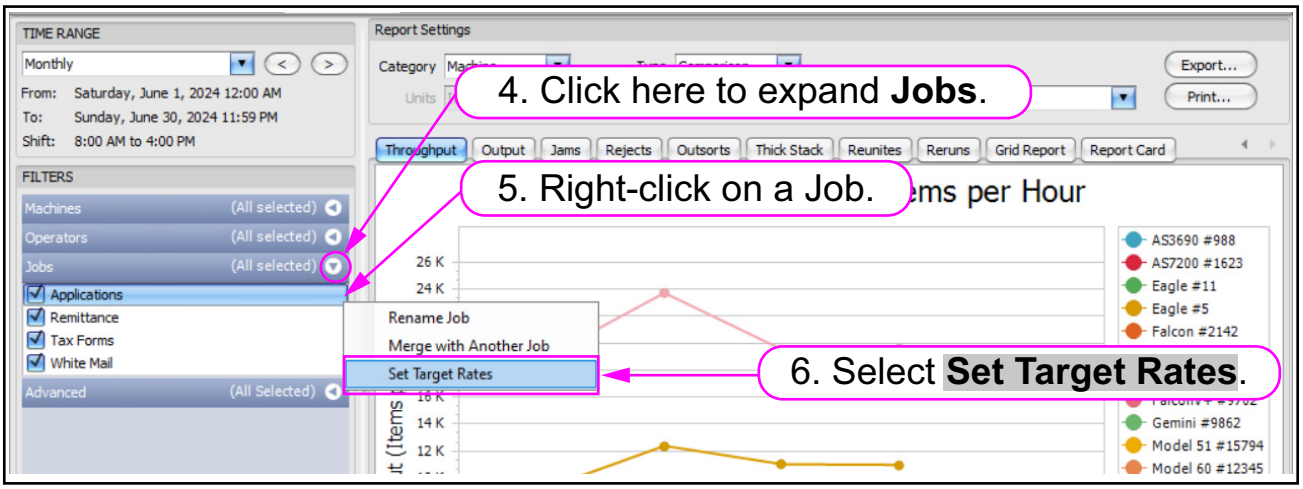


Figure 4-26: Setting A Job's Target Rate

7. The **Set Target Throughputs** window is displayed. At **Items per Hour**, enter a target Rate (Figure 4-27).
8. Click **OK** to close the **Set Target Throughput** window.

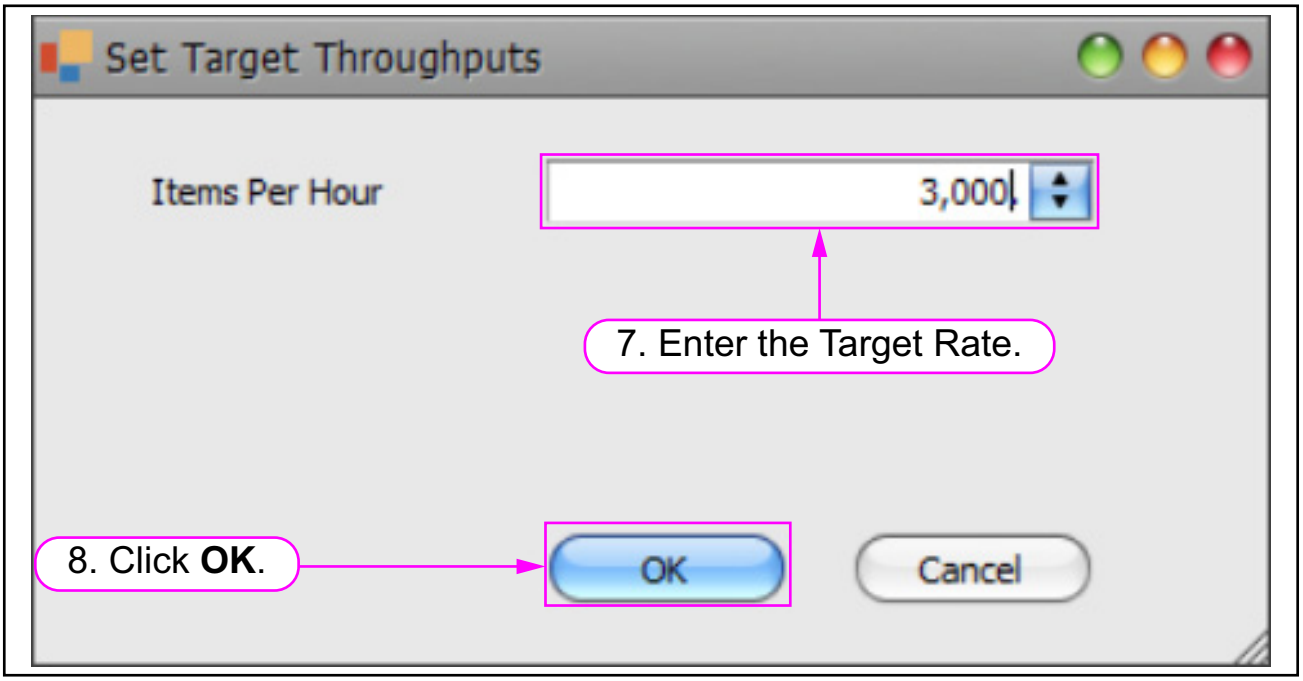


Figure 4-27: Set Target Throughputs window

9. Repeat steps 5 to 8 for the rest of the Jobs. The Target Rate is displayed as a horizontal blue line (Figure 4-28).

Note: *The Target Rate will only be displayed if it was set to the same value for all Jobs.*

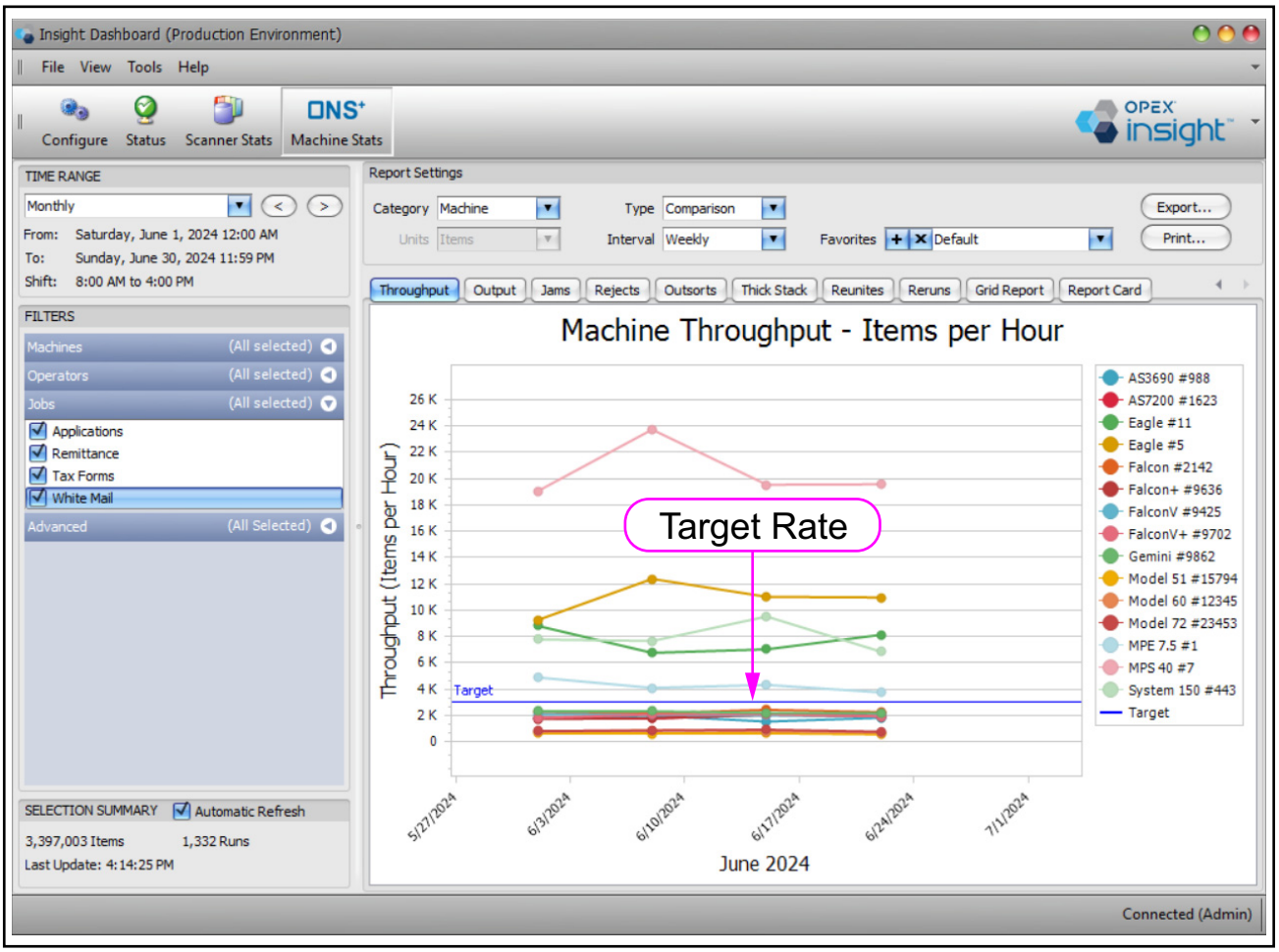


Figure 4-28: Target Rate

4.3.5. Additional Filter Notes

The filters are additive. For example, suppose the following are true:

- Set the **Machines** filter so that only “AS3690i #1” is checked.
- Set the **Operators** filter so that only “Bo DiBartolo” is checked.
- Set the **Jobs** filter so that only the “Applications” Job is checked.

  Then the reports will only include the Applications Job work run on Machine AS3690i #1 performed by Bo DiBartolo.

4.4. Selection Summary

Below the **Filters** area is the **Selection Summary** area, which displays a summary of the results, along with the date and time of the last update.

4.4.1. Selection Summary for Scanner Stats

For the **Scanner Stats** module, the **Selection Summary** area displays the total output count of pages and batches (Figure 4-29).

Select the **Automatic Refresh** check box to automatically update the display based on the latest data in real time (Figure 4-29).

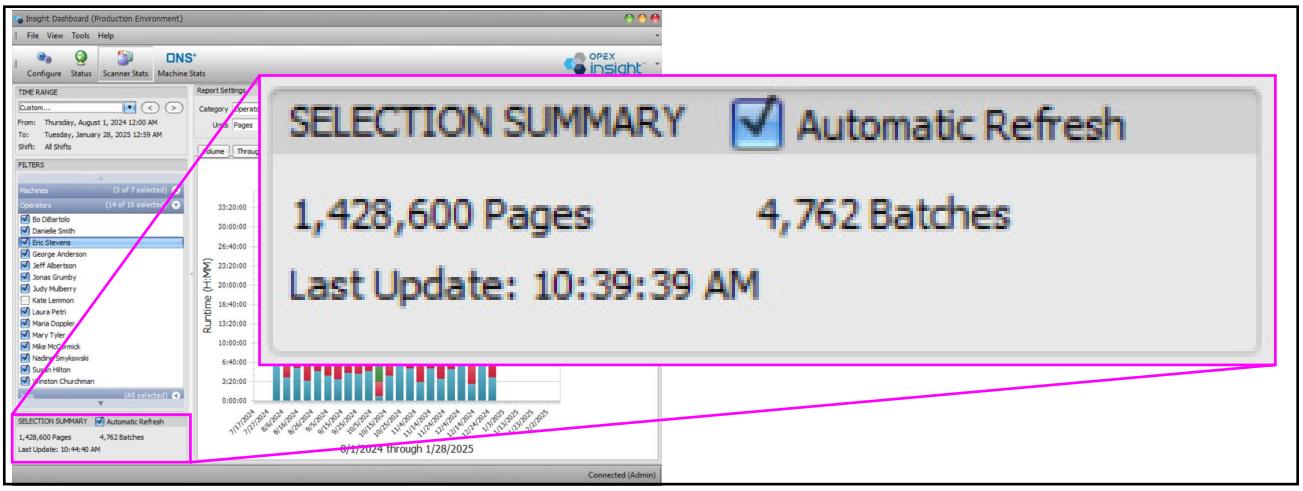


Figure 4-29: Selection Summary for the Scanner Stats Module

4.4.2. Selection Summary for ONS+ Machine Stats

The **Selection Summary** area for the **ONS+ Machine Stats** module is similar to that of the **Scanner Stats** module, except that it displays the total count of output items and Job runs (Figure 4-30).

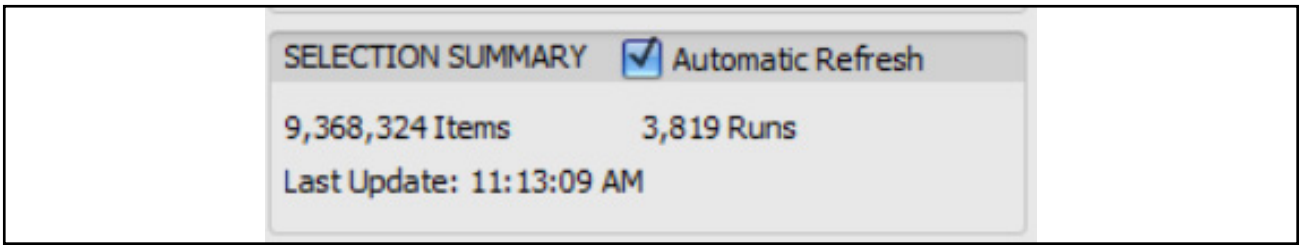


Figure 4-30: Selection Summary for the ONS+ Machine Stats Module

4.5. Configuring the Report Settings

The Report Settings area allows you to control which details are in the reports.

4.5.1. Report Settings for the Scanner Stats Module

The **Report Settings** area in the **Scanner Stats** module includes **Category**, **Type**, **Units**, **Interval** and **Favorites** (Figure 4-31).

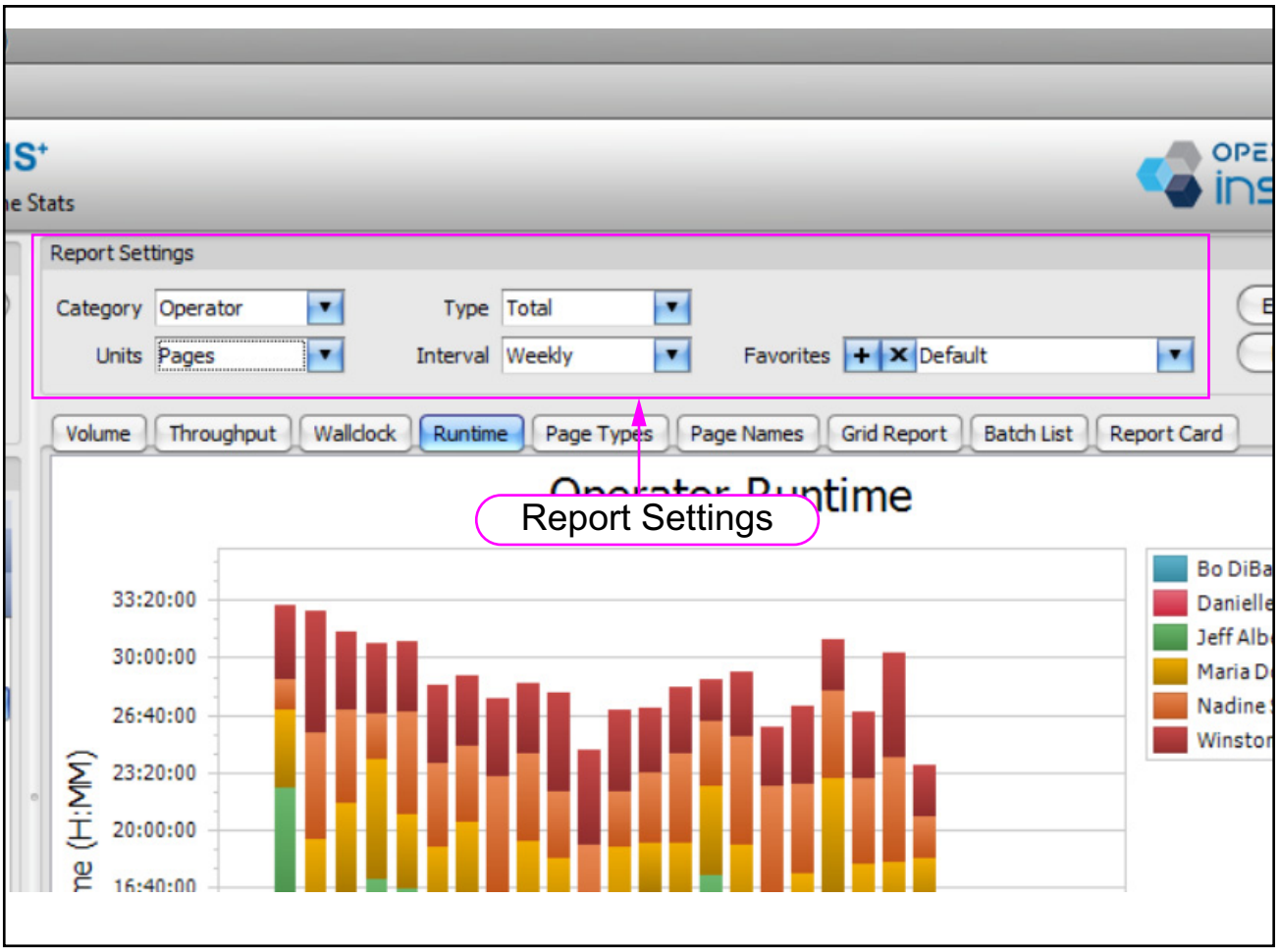


Figure 4-31: Report Settings in the Scanner Stats Module

The selections of the **Report Settings** in the **Scanner Stats** module are as follows (Table 4-1):

Table 4-1: Report Settings Selections for the Scanner Stats Module

Setting	Available Selections
Category	• Operator • Machine • Job • Summary
Type	• Comparison • Individual • Total
Units	• Batches • Transactions • Pages
Interval	Interval is the X axis (time) of the graph of data. Its selections depend on the **TIME RANGE** selection.
Favorites	Drop-down list of Default settings plus favorite settings.

Note: *When* **Type** *is set to* **Comparison**, *the results of different items are plotted, such as the results of different machines, etc.*

Note: *When* **Category** *is set to* `Summary`, *the total results per interval are displayed.*

The selections available to the **Interval** depend on the **TIME RANGE** setting (Table 4-2).

Table 4-2: Effect of Time Range on the Interval Settings

Time Range	Interval Settings Available
Daily	15 Minutes, Hourly, Daily
Weekly	Hourly, Daily, Weekly
Monthly	Daily, Weekly, Monthly, Day of Week
Yearly	Daily, Weekly, Monthly, Yearly, Day of Week
Custom	Any of the following may appear, based on the selected custom time range: 15 Minutes, Hourly, Daily, Weekly, Monthly, Yearly, Day of Week

4.5.2. Report Settings for the ONS+ Machine Stats Module

In the **ONS+ Machine Stats** module, the **Units** setting is excluded since batches, transactions, and pages are not applicable to the machine statistics (Figure 4-32 and Table 4-3).

Figure 4-32: Report Settings for the ONS+ Machine Stats Module

Table 4-3: Report Settings for the ONS+ Machine Stats Module

Setting	Available Selections
Category	• Operator • Machine • Job • Individual Run
Type	• Comparison • Individual • Total
Interval	These selections depend on the **TIME RANGE** selection, just like with the **Scanner Stats** module.
Favorites	Drop-down list of Default settings plus favorite settings.

Later sections discuss the different types of Machine reports (Volume, Throughput, etc.). Table 4-4 shows the values (units in the vertical axis of the graphs) for the different Machine report setting Types.

Table 4-4: Machine Report Settings: Type

Tab	Comparison	Individual	Total
Volume	Items	Items	Items
Throughput	Items Per Hour	Items Per Hour	Items Per Hour
Output	% Input	Items	Items
Jams	Items/Jams	Jams	Jams
Rejects	% Input	Items	Items
Outsorts	% Input	Items	Items
Thick Stack	% Input	Items	Items
Reunites	% Input	Items	Items
Reruns	% Input	Items	Items

4.5.3. Favorites

The **Favorites** feature makes it easy to save a group of often-used report settings so that you can easily select the settings when needed. This feature applies to both the **Scanner Stats** module and the **ONS+ Machine Stats** module.

4.5.4. Saving a Favorite Report

1. Click a tab to select a report type (Figure 4-33).

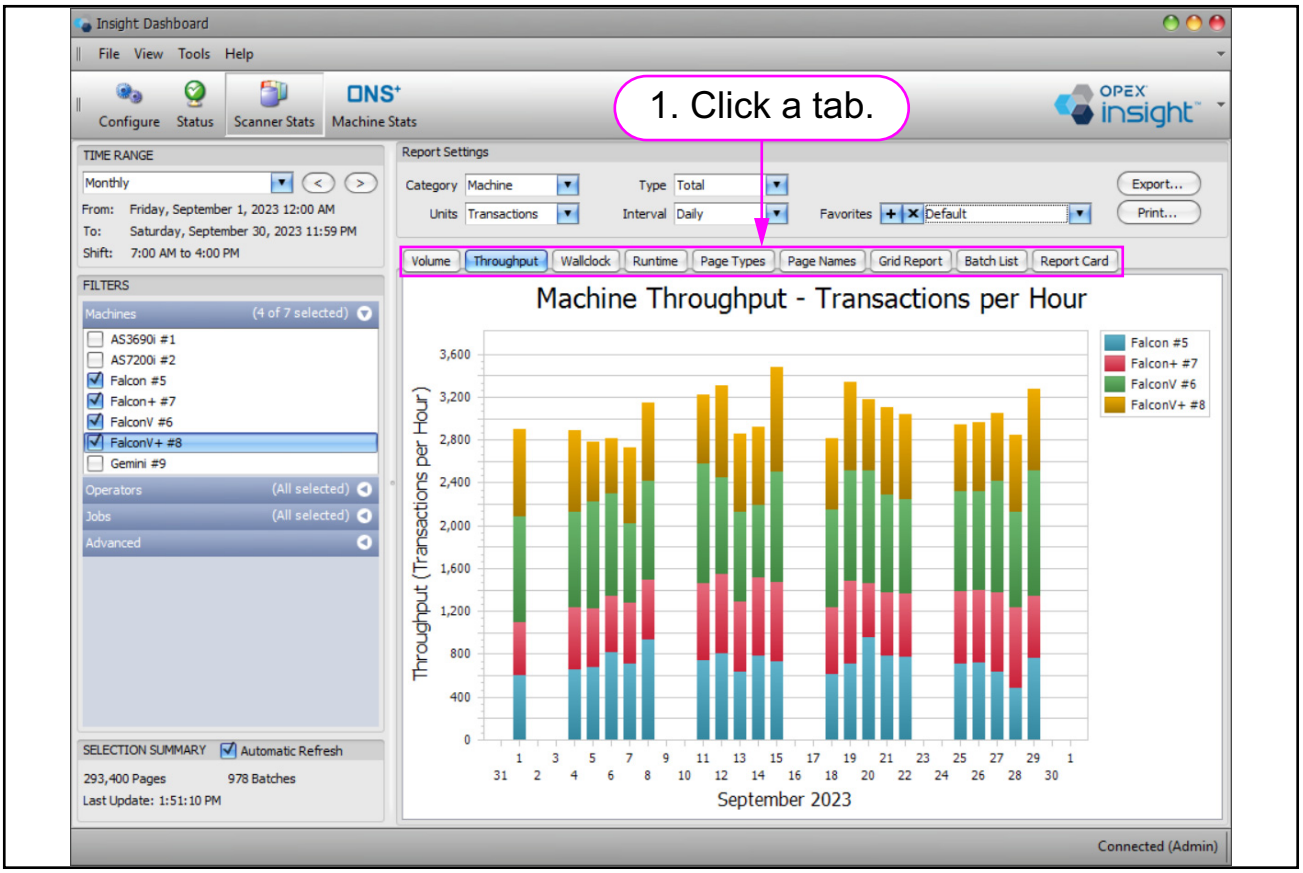


Figure 4-33: Selecting the type of report

2. Set the **TIME RANGE** settings as desired (Figure 4-34).
3. Set the **Filters** settings as desired.
4. Set the **Report Settings** as desired.

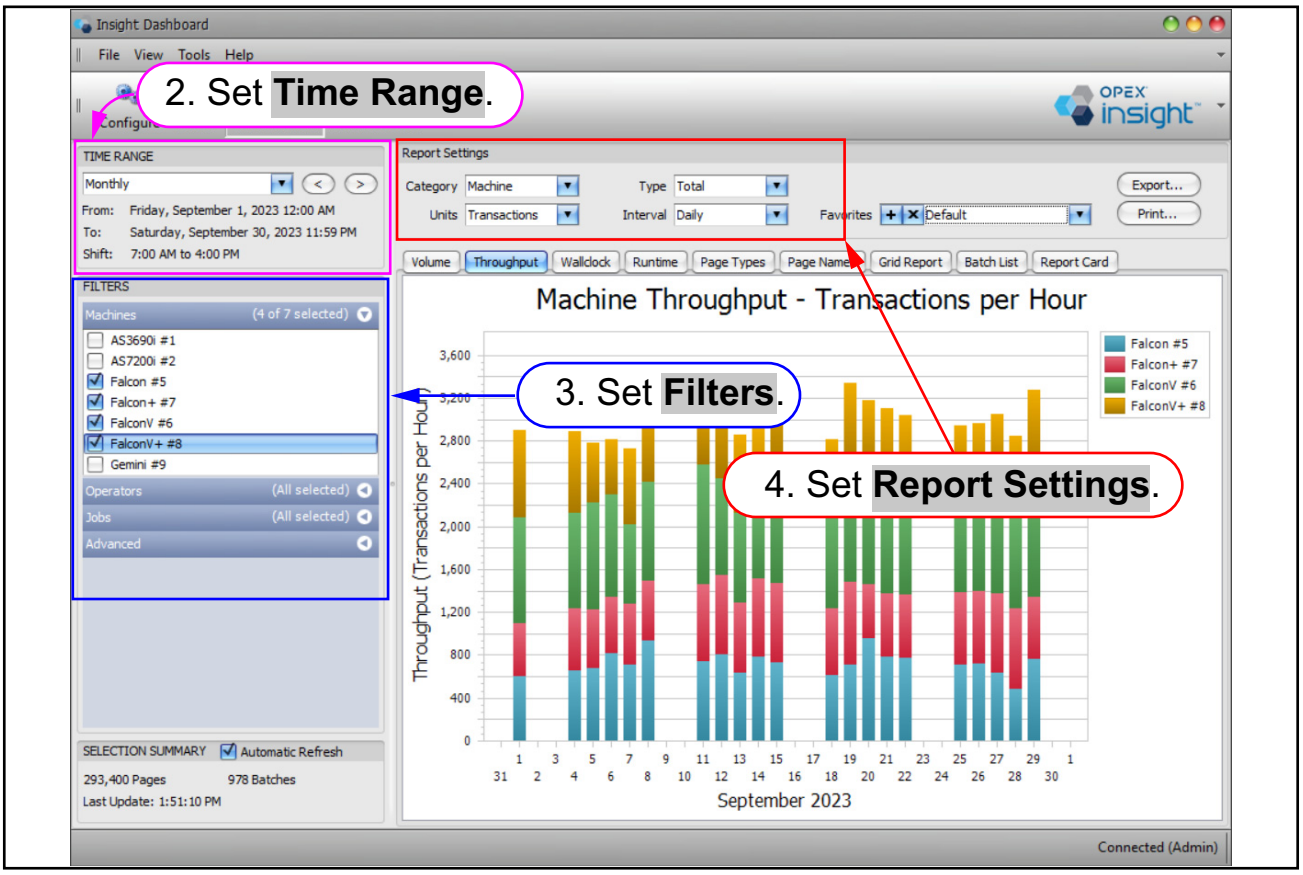


Figure 4-34: Save Favorite Report - setup

5. Click the plus sign next to **Favorites**. The **Save Favorite Report** window opens (Figure 4-35).
6. Enter a name for your **Favorite** in the **Report Name** field.
7. Click the **OK** button. The report setting will be saved.

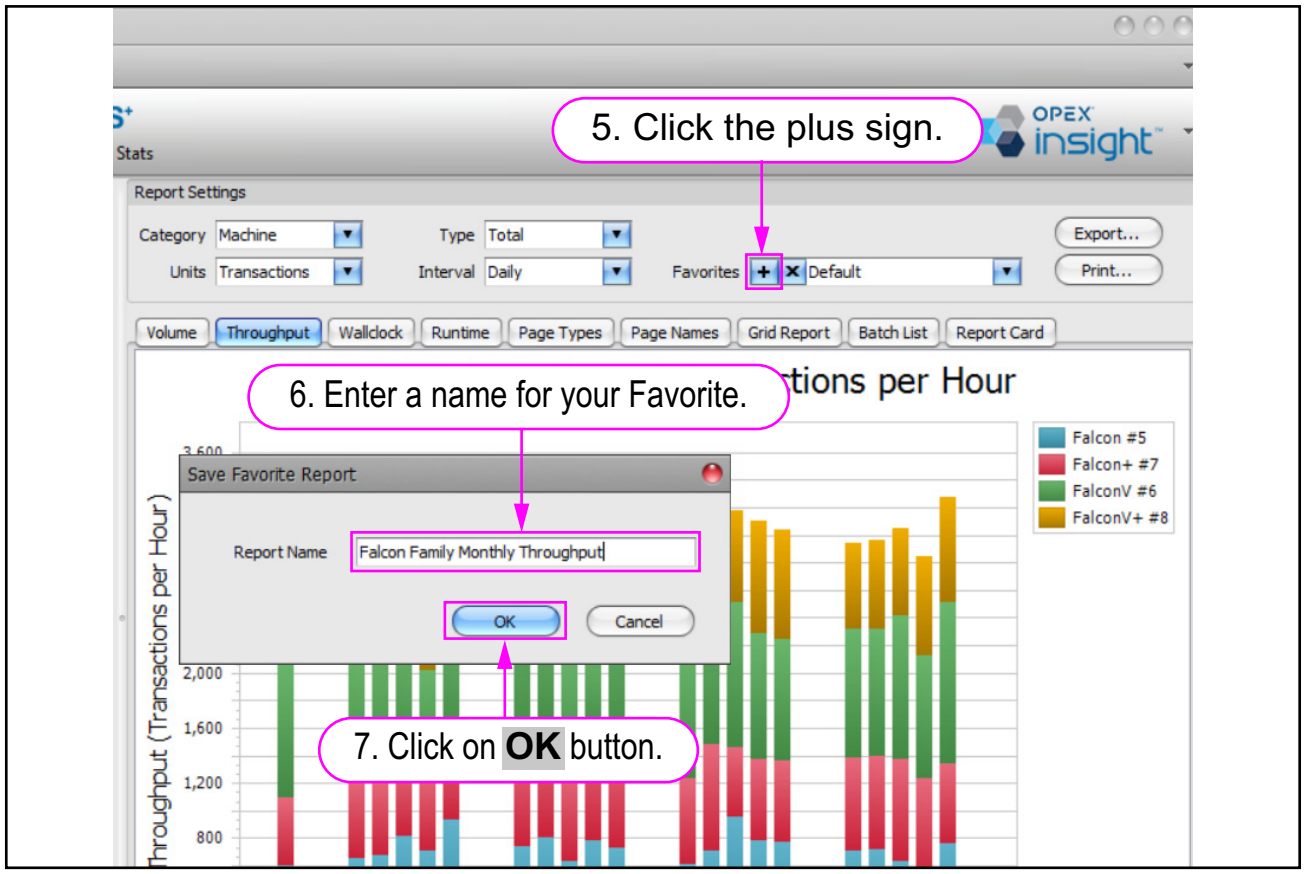


Figure 4-35: Save Favorite Report window

8. Click the **Favorites** drop-down list. Confirm that the newly created **Favorite** is in the list (Figure 4-36).

Figure 4-36: Newly created Favorite in the Drop-down List

The saved settings will include **TIME RANGE** drop-down and the **Shift** settings in the **TIME RANGE** area, the **Machines**, **Operators**, **Jobs**, and **Advanced** settings in the **Filters** area, and the **Category**, **Type**, **Units**, and **Interval** settings in the **Report Settings** area.

> ***Note:*** *The* **From** *and* **To** *times in the* **TIME RANGE** *area will not be saved. When you select a saved favorite report, the* **From** *and* **To** *settings default to a time period that includes the current day.*

4.5.5. Selecting a Saved Favorite Report

1. Click the drop-down arrow at **Favorites** (Figure 4-37).
2. Click on a saved report in the drop-down list. Your report will appear using the saved settings for the favorite report.

   The **From** and **To** dates for the **TIME RANGE** will automatically be adjusted so that the range includes the current day. For example, if the report is a monthly report, the dates will be set so that the month includes the current day.
3. If you want to see data from a different time period, adjust the time range settings accordingly.

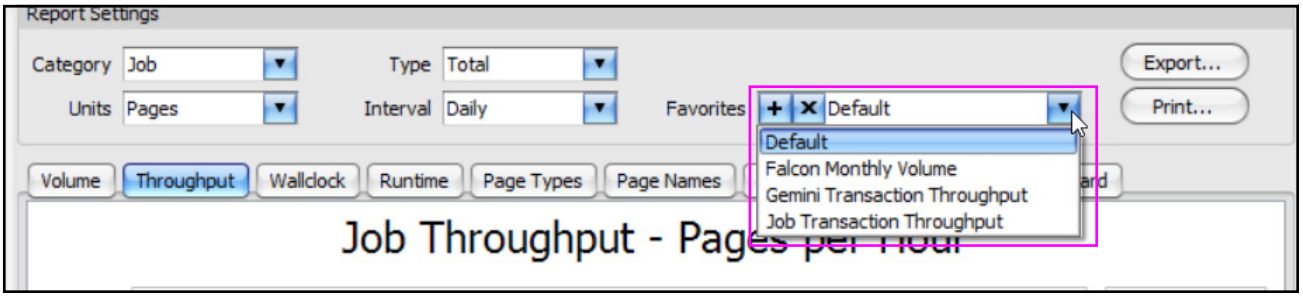


Figure 4-37: Selecting a Favorite Report

4.5.6. Deleting a Saved Favorite Report

1. Click the drop-down arrow for **Favorites** (Figure 4-38).
2. Click on the saved report in the drop-down list that you want to delete.

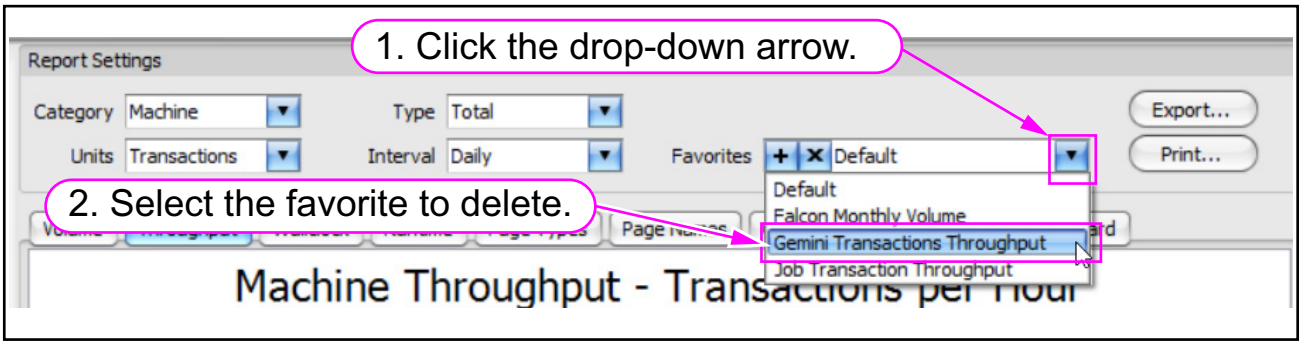


Figure 4-38: Select Favorite to Delete

3. Click the **X** next to **Favorites** (Figure 4-39). A **Confirm Delete** window opens (Figure 4-40).

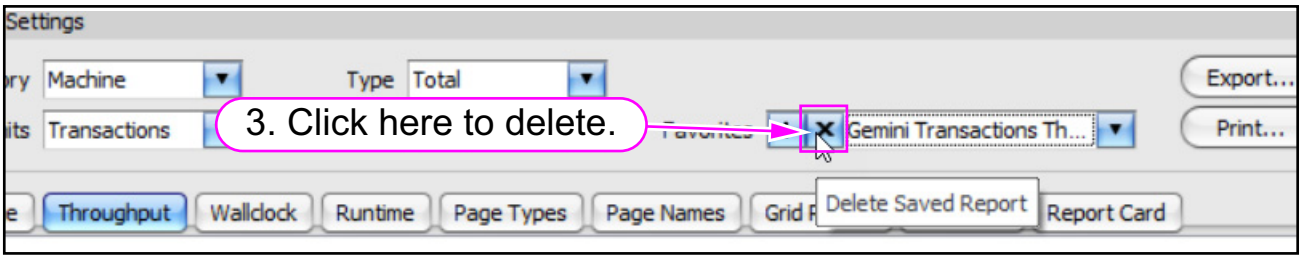


Figure 4-39: Delete the Favorite

4. Click the **OK** button to delete the saved report (Figure 4-40).

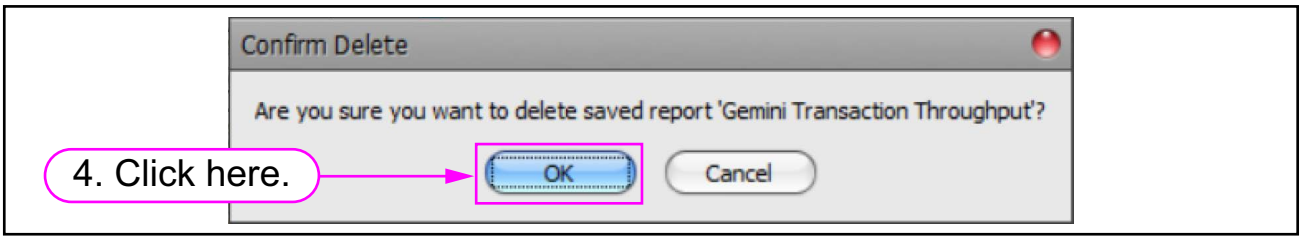


Figure 4-40: Confirm Delete window

4.6. Scanner Stats Module Report Types

The Scanner Stats module has the following scanner statistics report types (Figure 4-41):

- Volume
- Throughput
- Wallclock
- Runtime
- Page Types
- Page Names
- Grid Names
- Batch List
- Report Card

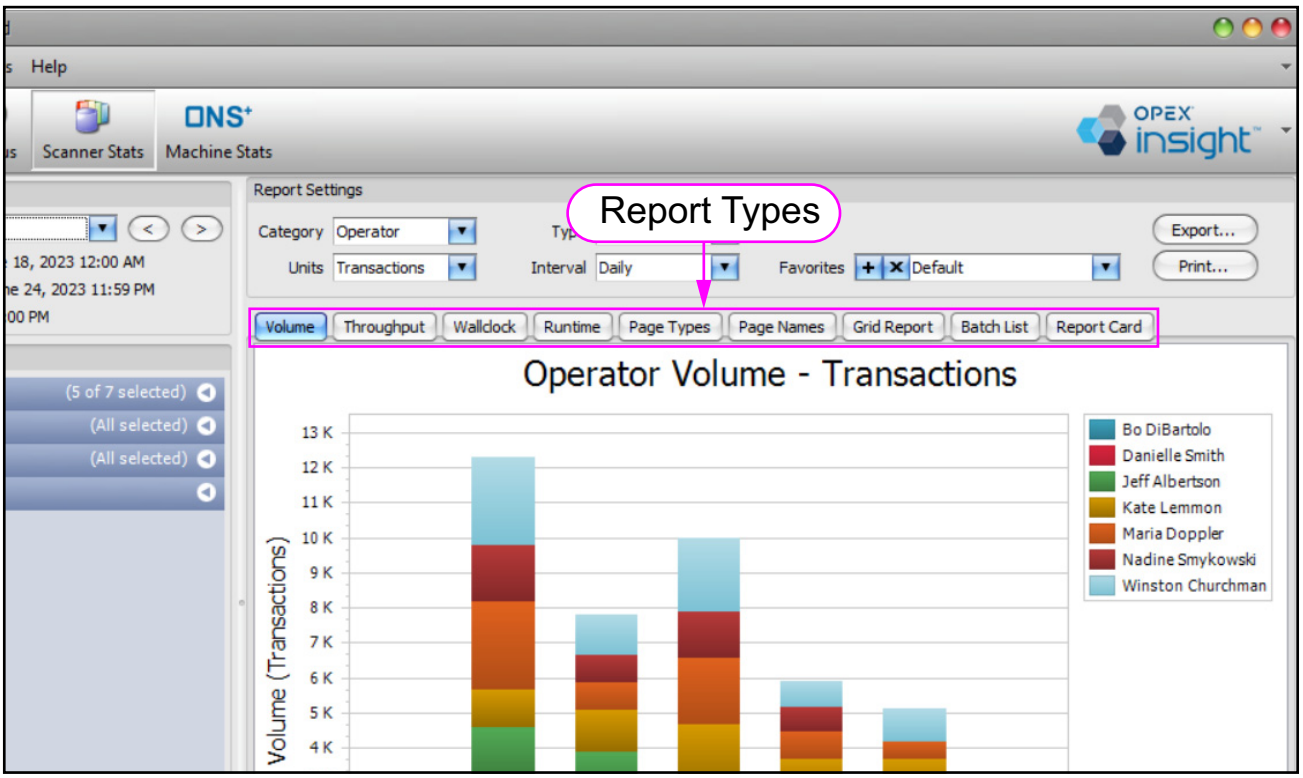


Figure 4-41: Scanner Stats module report Types

4.6.1. Volume Report

The Volume Report provides statistics on the volume of work handled by the scanners selected in **Filters** (Figure 4-42).

1. Click the **`Volume`** tab to access the scanner statistics volume report.
2. Set the **TIME RANGE**, **Filters** and **Report Settings**.

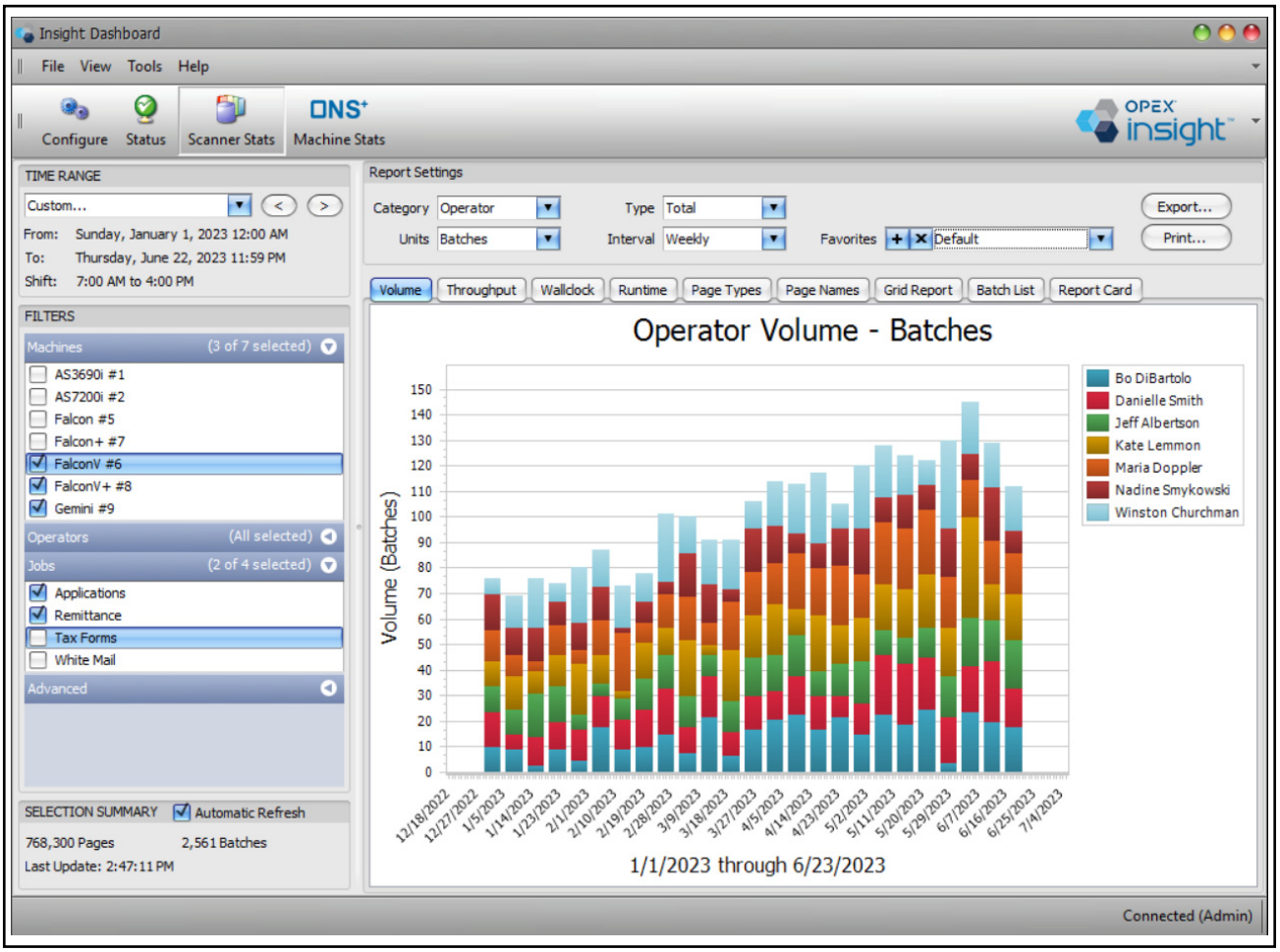


Figure 4-42: Volume report

4.6.1.1. Volume Report - Example 1

1. In **Filters**, select several scanners and a couple of Jobs.
2. Set **Report Settings** as in Table 4-5.

Table 4-5: Report Settings for Volume Report Example 1

Category	Units	Type	Interval
Operator	Transactions	Comparison	Daily

- The resulting report displays a comparison of the daily volume of transactions scanned by operator (Figure 4-43).
- The report is a line graph with a line for each operator.
- The lines in the graph are color-coded based on the key shown to the right of the graph.

3. Hover your cursor over a point in one of the lines. This displays Information for that point and line, such as the operator name, the volume of scanned transactions at that point, and the date represented by the point.

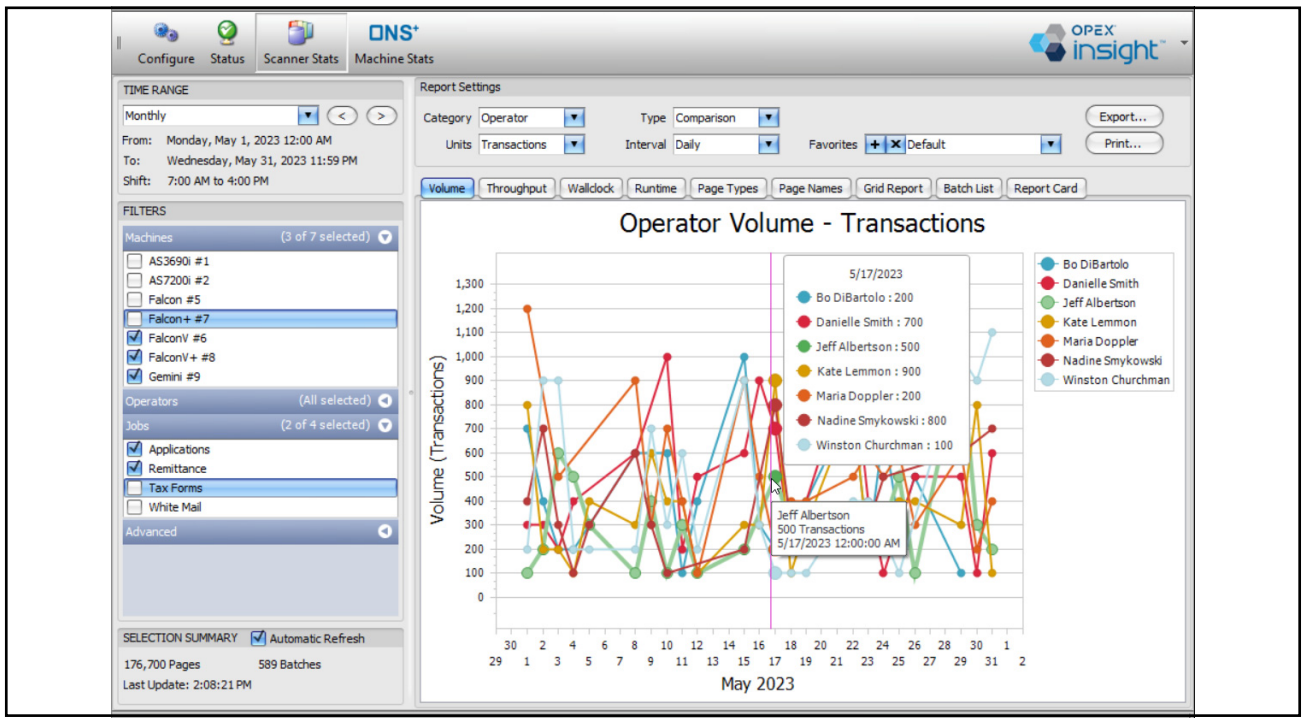


Figure 4-43: Volume Report - example 1

4.6.1.2. Volume Report - Example 2

1. Set **Report Settings** as in Table 4-6.

Table 4-6: Report Settings for Volume Report Example 2

Category	Units	Type	Interval
Job	Transactions	Total	Weekly

- The resulting report displays a bar graph of weekly total transactions scanned for each Job (Figure 4-44).
- Since the **Interval** setting is `Weekly`, we see one bar for each week during the selected time range.
- The segments in each bar represent the relative volumes run for each Job.
- The segments are color-coded based on the Job key shown to the right of the graph.

2. Hover your cursor over a segment in one of the bars. This displays information for that segment, such as the Job name, the volume of scanned transactions, and the date.

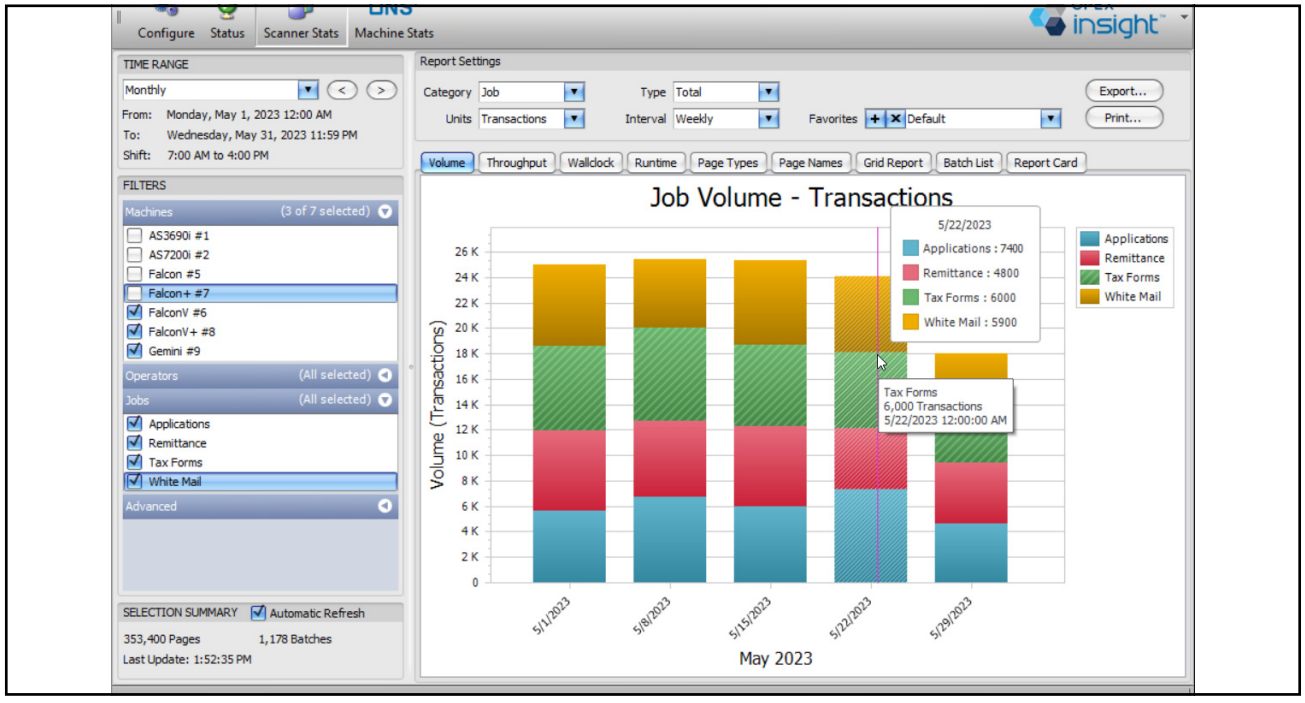


Figure 4-44: Volume Report - example 2

4.6.1.3. Volume Report - Example 3

1. Set **Report Settings** as in Table 4-7..

Table 4-7: Report Settings for Volume Report Example 3

Category	Units	Type	Interval
Operator	Transactions	Individual	Daily

- The resulting report displays daily transaction volumes for each individual operator (Figure 4-45)
- Since the report is set to volumes by individual, there is a separate page in the report for each individual operator.
- The page indicator in the Report Settings shows how many pages are in the report and which page you are currently viewing.

2. To step through the pages, click on the arrows in the page controls or change the page at the page indicator.

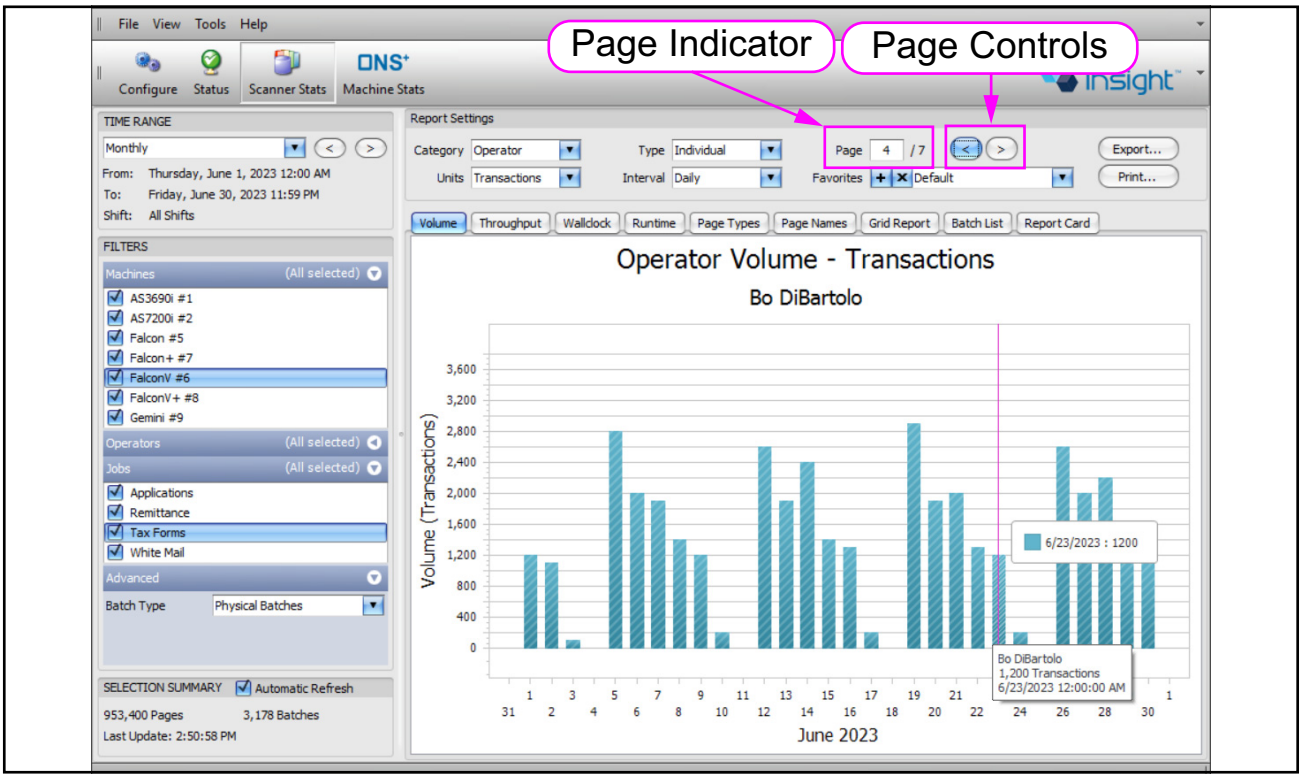


Figure 4-45: Volume Report - example 3

Note: *If you select* `Day of Week` *for the* **Interval** *setting, the volume report will include one page for each day of the week, and the page controls let you step through the pages.*

- Each page in the report displays the daily volume of transactions processed by one of the operators (in this example, operator Bo DiBartolo).

3. Hover the cursor over one of the bars. This displays information for that bar, such as the operator name, the volume of scanned transactions, and the date (Figure 4-46).

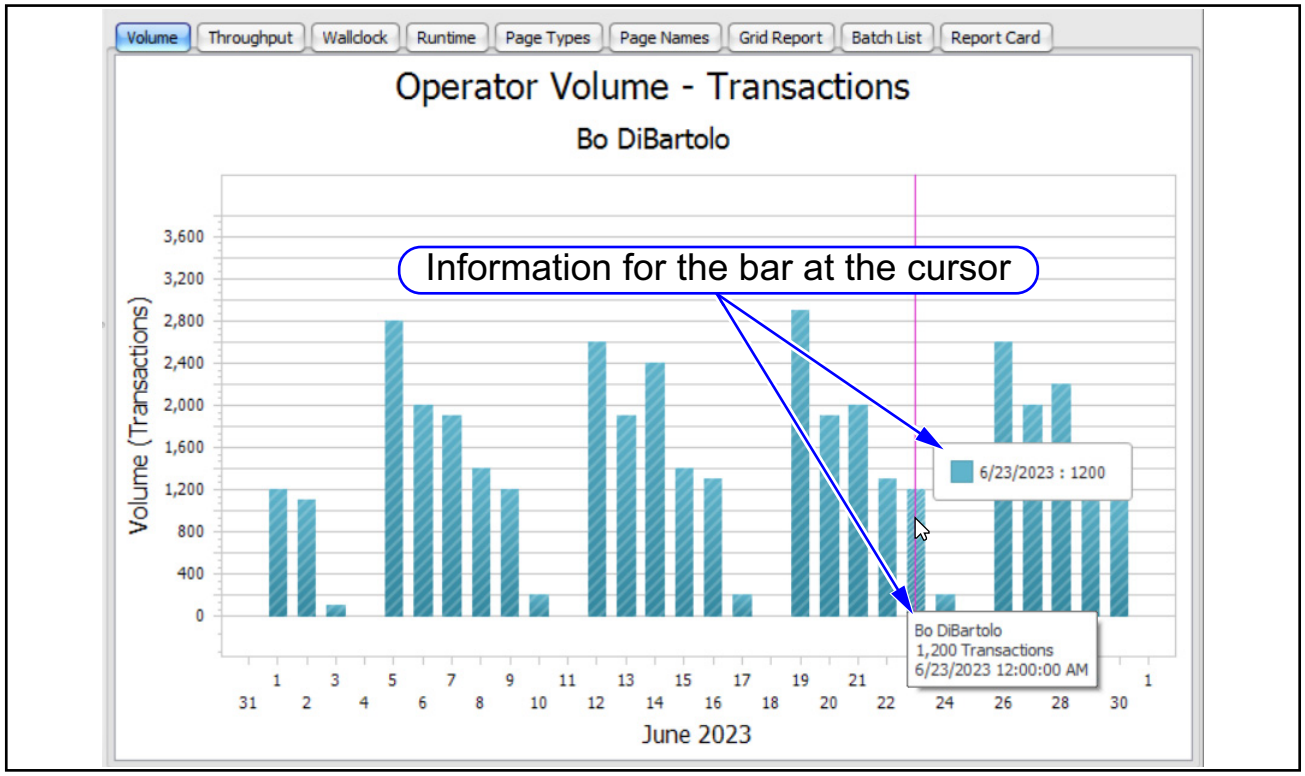


Figure 4-46: Displayed data at the cursor

4.6.1.4. Volume Report - Example 4

This example illustrates displaying the same data with different graphical presentations.

1. Set **Report Settings** as in Table 4-8. The resulting report displays daily transaction volumes (Figure 4-47). Each bar in the graph represents the total volume reached by the end of that week.
2. To display information for one of the bars, hover the cursor over the bar. Information displayed for that bar includes the total number of transactions and the last date and time of that week.

Table 4-8: Report Setting for Volume Report Example 4

Category	Units	Type	Interval
Summary	Transactions	Total	Weekly

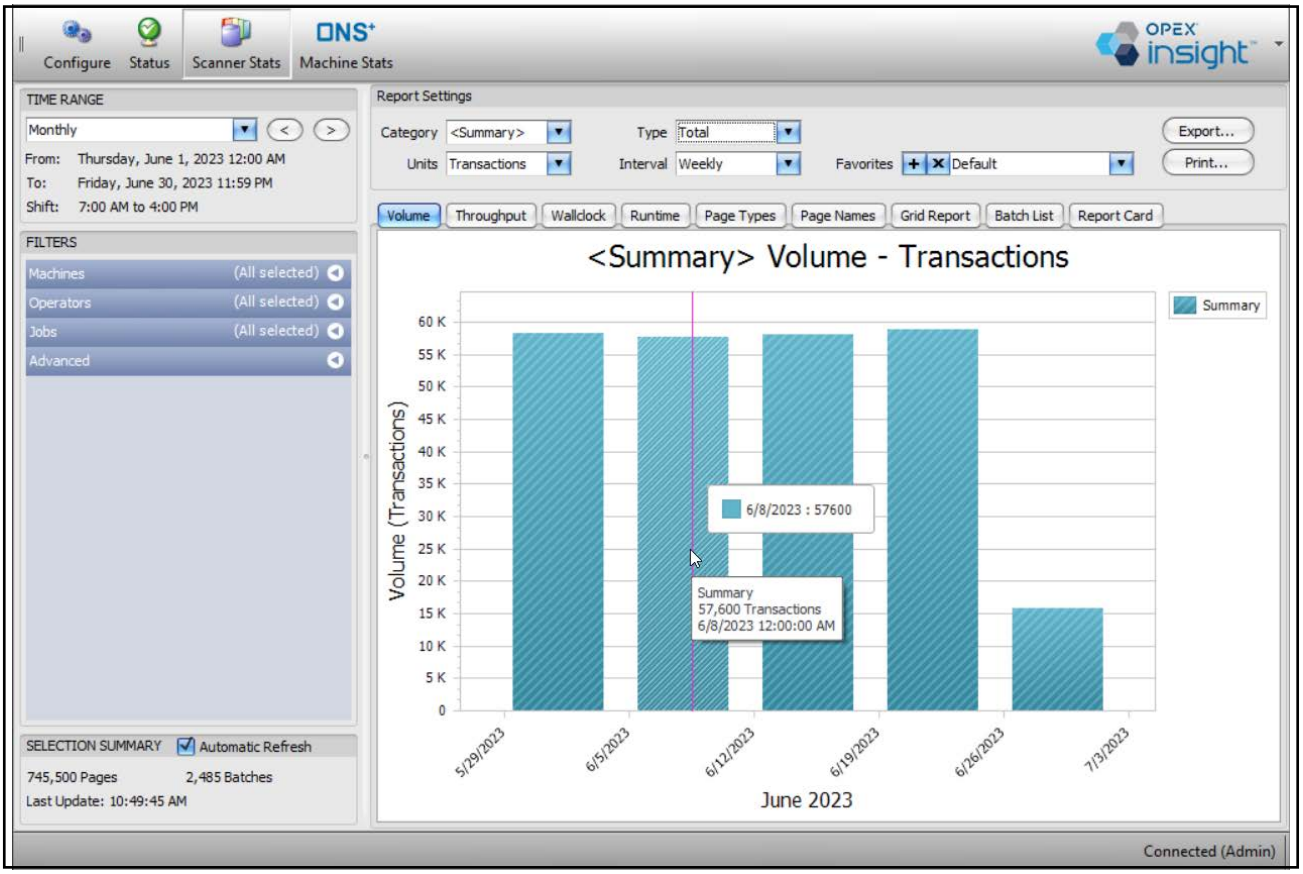


Figure 4-47: Volume Report - example 4

3. Change **Type** to **`Individual`**. (Keep all the other report settings the same.)
   - The resulting report displays a bar graph similar to when **Type** is set to **`total`**. This occurs because the Category is **`Summary`**, so no individual operators or machines are considered.
   - The word “Summary” is moved from the right side of the graph to above the graph (Figure 4-48).

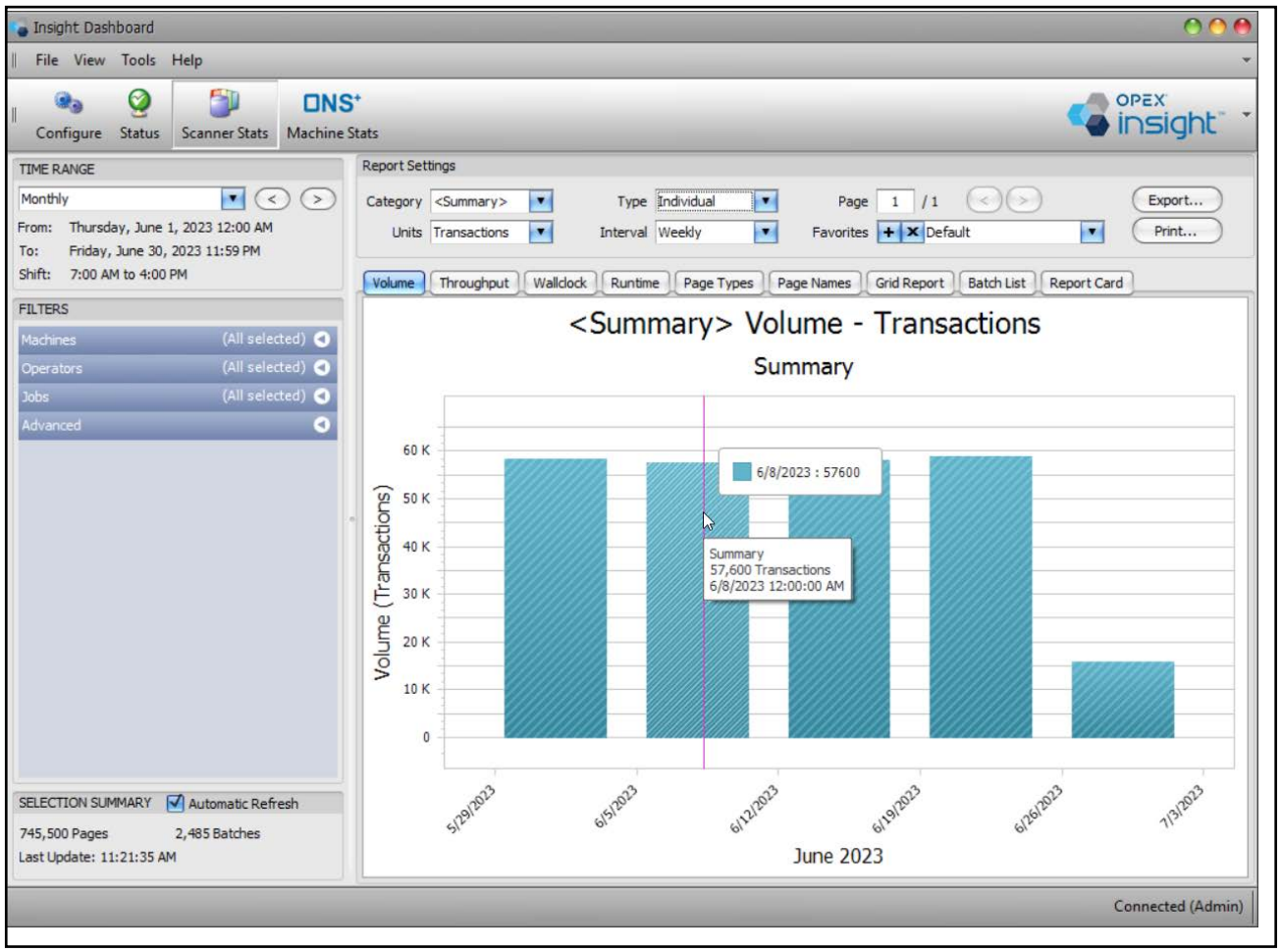


Figure 4-48: Volume Summary with Type set to Individual

4. Change **Type** to **Comparison**. The data is represented as a line plot (Figure 4-49).

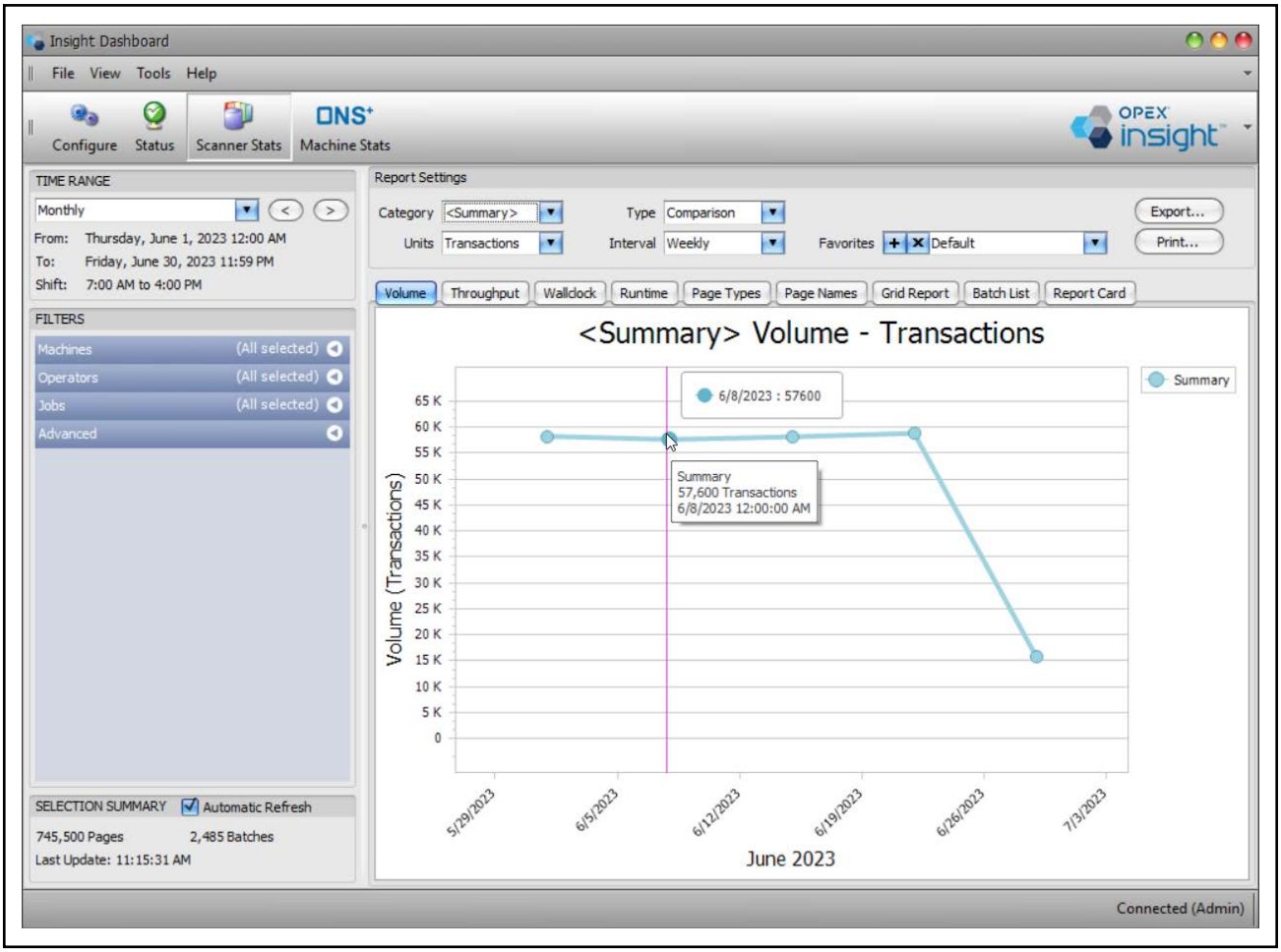


Figure 4-49: Volume Summary with Type set to Comparison

4.6.2. Throughput Report

The Throughput Report provides statistics on the throughput for your scanners. Throughput is defined as the volume of work (number of batches, transactions, or pages) divided by the time it took to scan (Figure 4-50).

Hover the cursor over the **Throughput** tab to display a tool tip which explains throughput (Figure 4-51).

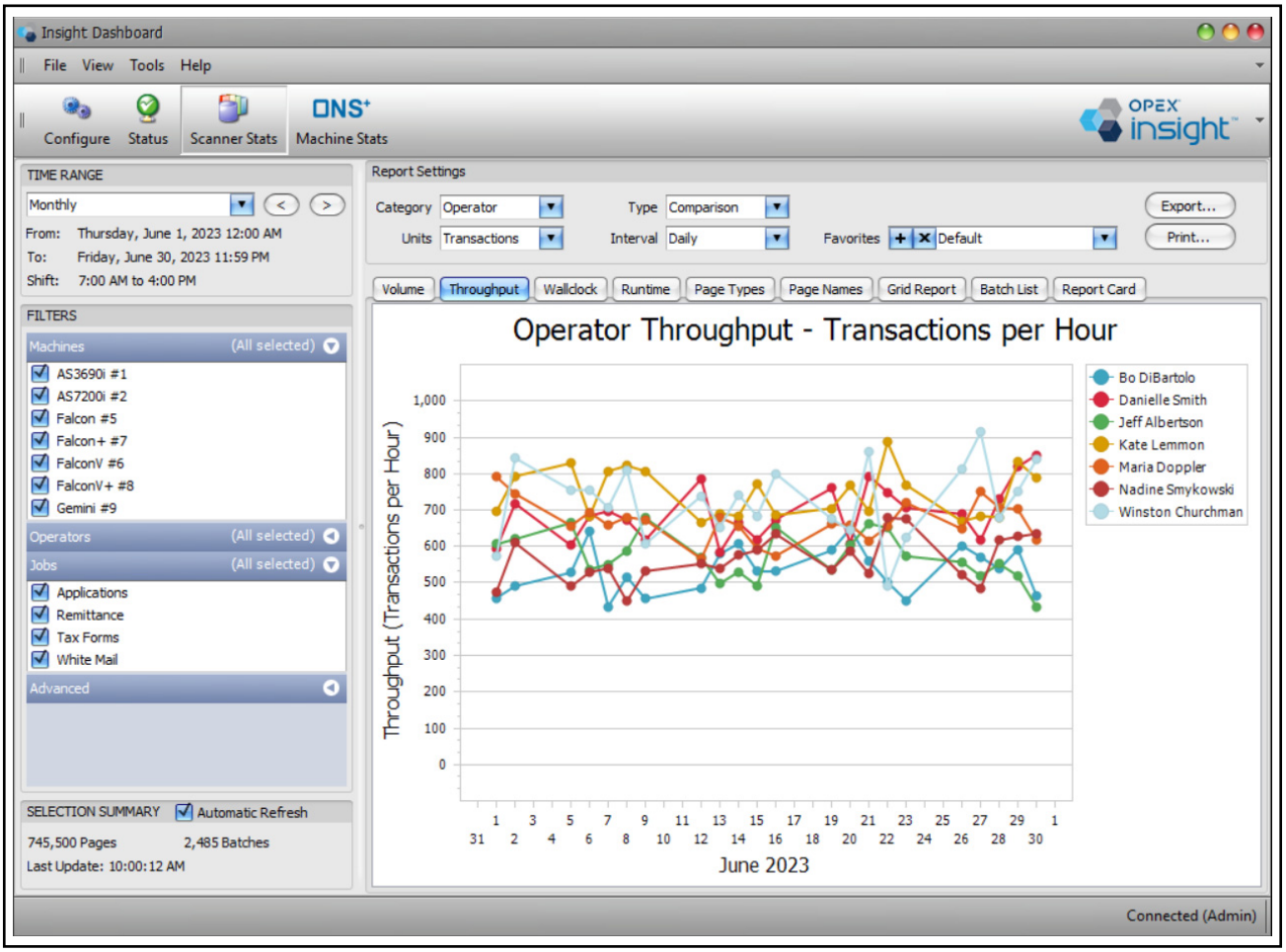


Figure 4-50: Throughout report

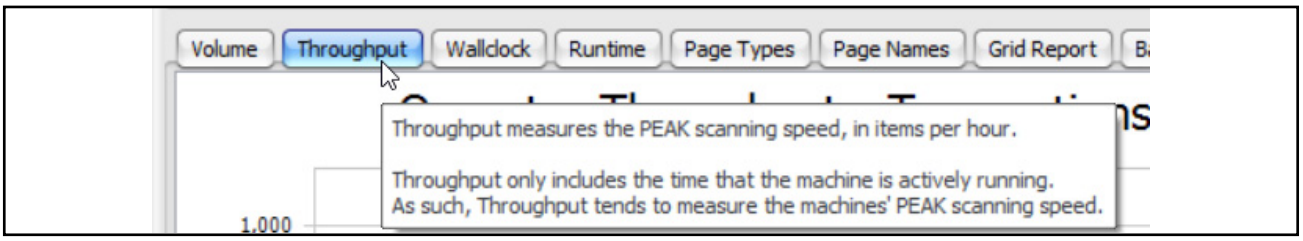


Figure 4-51: Throughput Tooltip

4.6.2.1. Throughout Report - Example 1

1. Set **Report Settings** as in Table 4-9.

Table 4-9: Report Settings for Throughput Report Example 1

Category	Units	Type	Interval
Operator	Transactions	Comparison	Daily

- The resulting report is a comparison of the daily throughput in transactions per hour for each operator (Figure 4-52).
- The report is a line graph with a line for each operator.
- The lines in the graph are color-coded, based on the key shown to the right of the graph.

2. Hover the cursor over a point in one of the lines. This displays information for that point, including the operator name, throughput, and date.

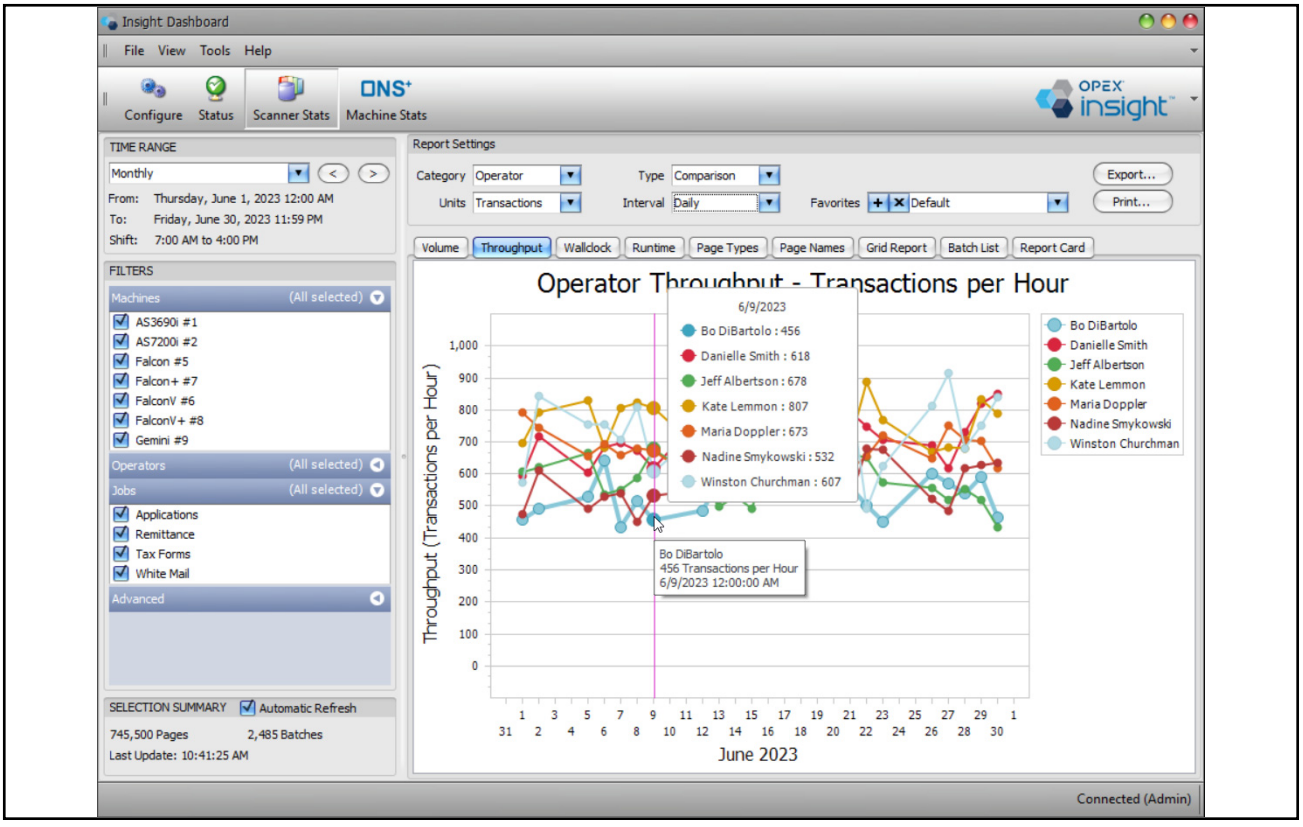


Figure 4-52: Throughput report - example 1

4.6.2.2. Throughput Report - Example 2

1. Set **Report Settings** as in Table 4-10.

Table 4-10: Report Settings for Throughput Report Example 2

Category	Units	Type	Interval
Job	Transactions	Total	Weekly

- The resulting report is a bar graph with a weekly total throughput in transactions per hour for each Job (Figure 4-53).
- Since the **Interval** setting is set to `Weekly`, there is one bar for each week during the selected time range.
- The segments in each bar represent the relative throughput for each Job.
- Segments are color-coded, based on the Job key shown to the right of the graph.

2. Hover the cursor over a segment in one of the bars to display information for that segment, such as the Job name, throughput, and date.

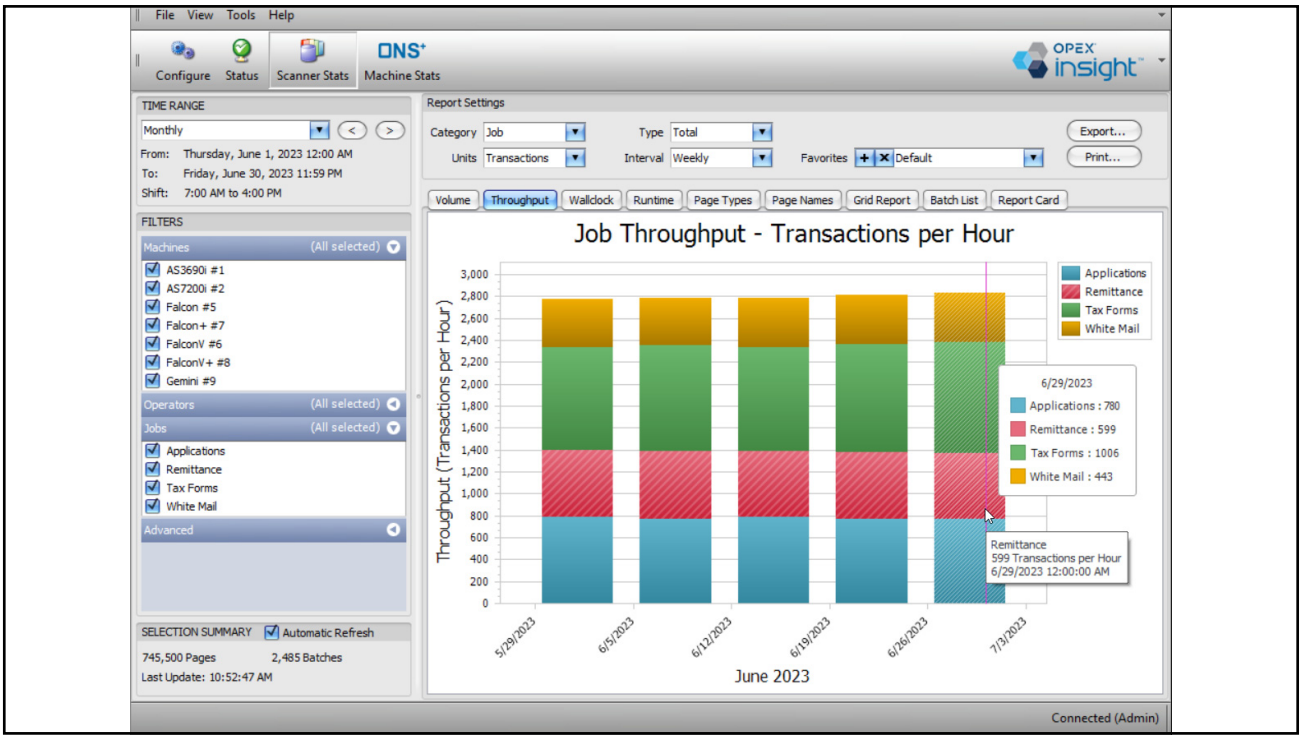


Figure 4-53: Throughput report - example 2

4.6.2.3. Throughput Report - Example 3

1. Set **Report Settings** as in Table 4-11.
   - The resulting report displays daily throughput in transactions per hour for each individual operator (Figure 4-54).
   - Each page displays the daily throughput for one of the operators.
   - To step through the pages, use the page controls or page indicator.

Table 4-11: Report Settings for Throughput Report Example 3

Category	Units	Type	Interval
Operator	Transactions	Individual	Daily

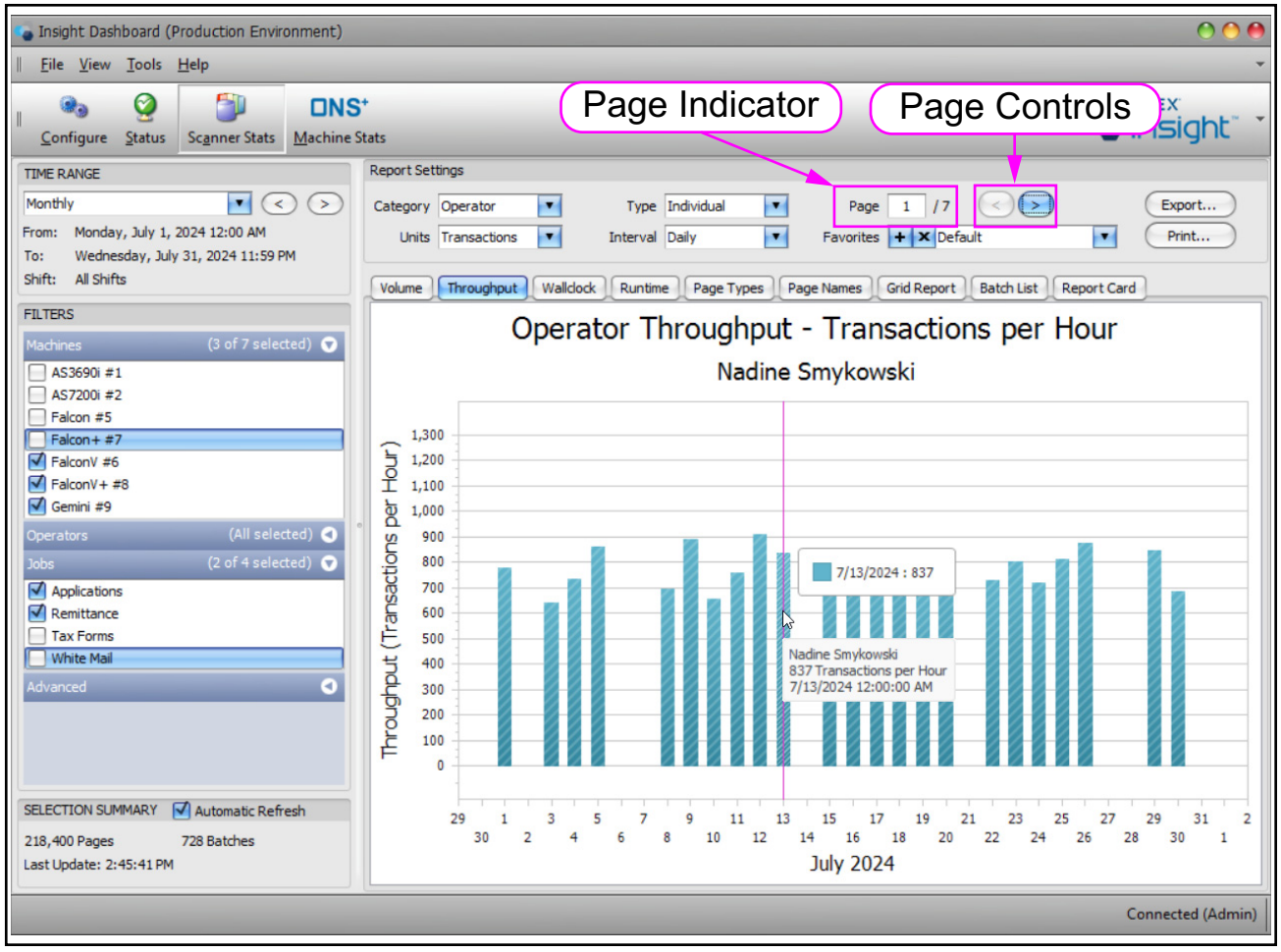


Figure 4-54: Throughput report - example 3

2. Change **Interval** to `Day of Week`. The throughput report displays a separate page for each day of the week (Figure 4-55).
3. Hover your cursor over one of the bars to display information for that bar, such as the operator name, throughput, and date.

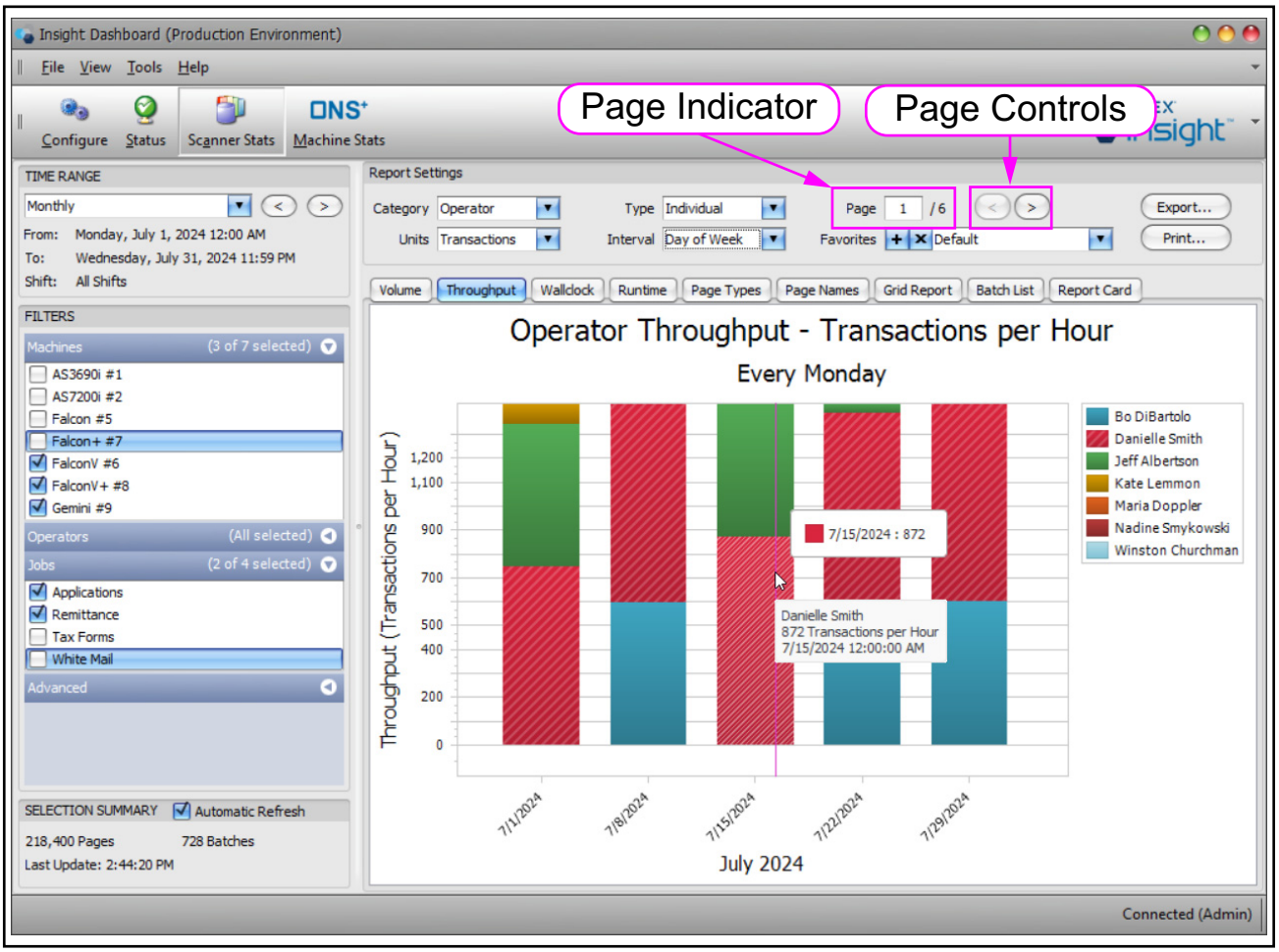


Figure 4-55: Throughput - Day of the week

4.6.3. Wallclock Report versus Throughput Report

Wallclock reports and throughput reports are based on information from the batch files. Their definitions apply to all machines, not just scanners. Here is how they differ from each other:

Throughput is the total number of items processed on a scanner divided by the total time that the scanner was actively running. It does not include any idle time in between consecutive batches (Figure 4-56).

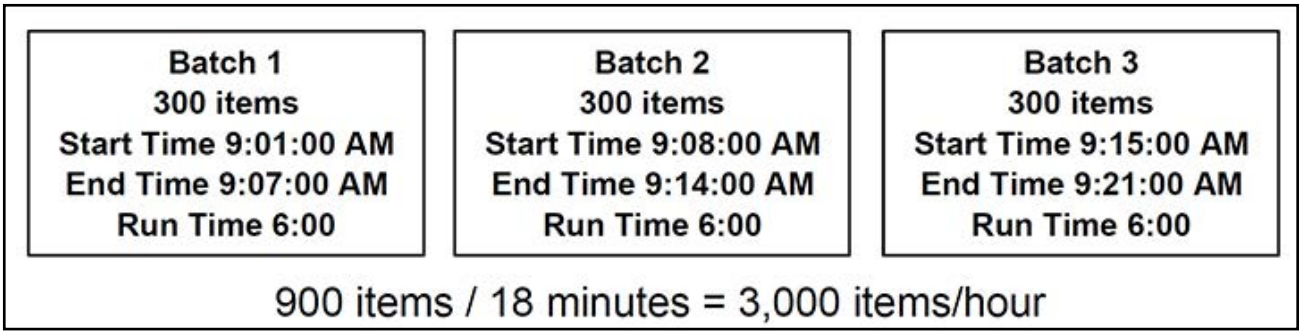


Figure 4-56: Throughput Scanner Stats

Wallclock is similar to throughput, but as part of the total scanner run time, it includes the small gaps between batches (less than 15 minutes) when the scanner was not actively running, e.g., if an operator took a few minutes between batches to clean a scanner sensor. The wallclock rate is calculated by using the volume in the batches divided by the start time of the first batch and end time of the last batch (Figure 4-57). If the time between the start time of one batch is greater than 15 minutes from the end time of the previous batch, it will be considered a separate run.

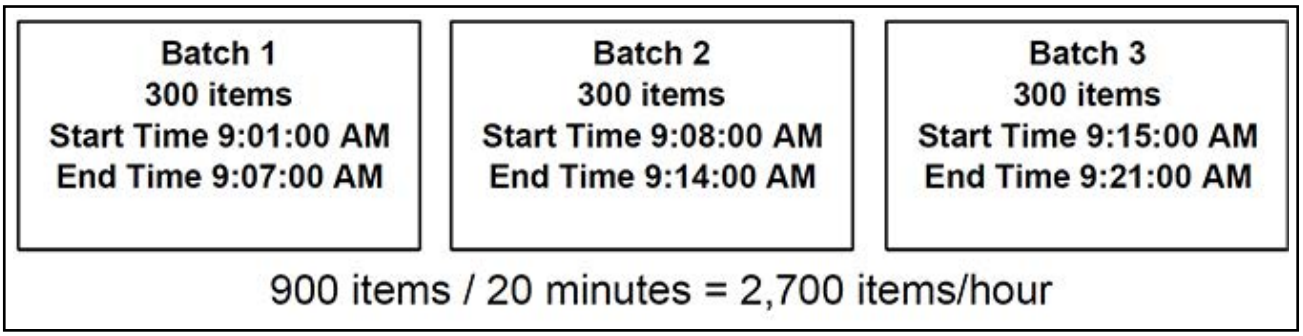


Figure 4-57: Wallclock Scanner Stats

Therefore, the throughput report tends to show peak processing rates while the wallclock report tends to show average processing rates (in items per hour).

4.6.4. Wallclock Report

1. Click the **Wallclock** tab to access the scanner statistics wallclock report (Figure 4-58).
2. Use the wallclock report the same way as the throughput report.

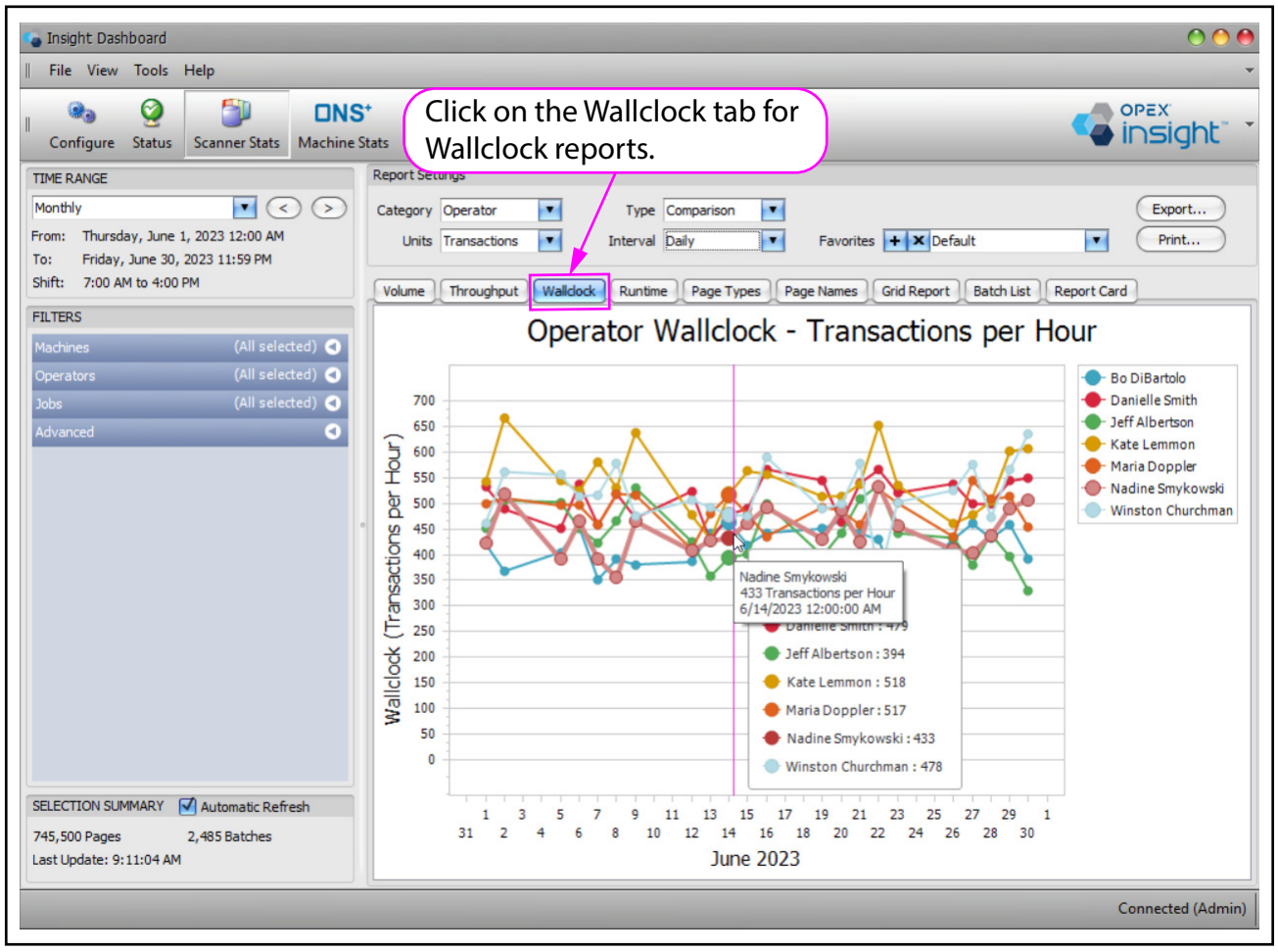


Figure 4-58: Wallclock Report

3. Hover the cursor on the **Wallclock** tab to display a tooltip which explains what wallclock is (Figure 4-59).

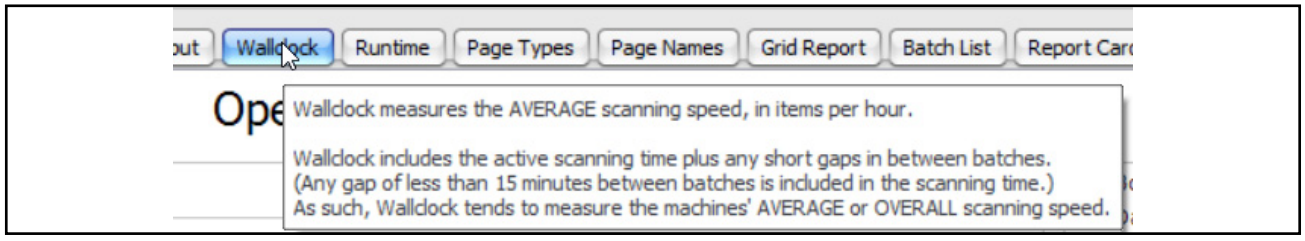


Figure 4-59: Wallclock Tooltip

4.6.5. Runtime Report

The Runtime Report provides statistics on the amount of time your scanners were used (Figure 4-60).

1. Click the **Runtime** tab to access the scanner statistics runtime report.
2. Set the **TIME RANGE**, **Filters**, and **Report Settings** as usual.

   Note: *In* **Report Settings***,the* **Units** *setting is not used for the runtime report and should be ignored.*

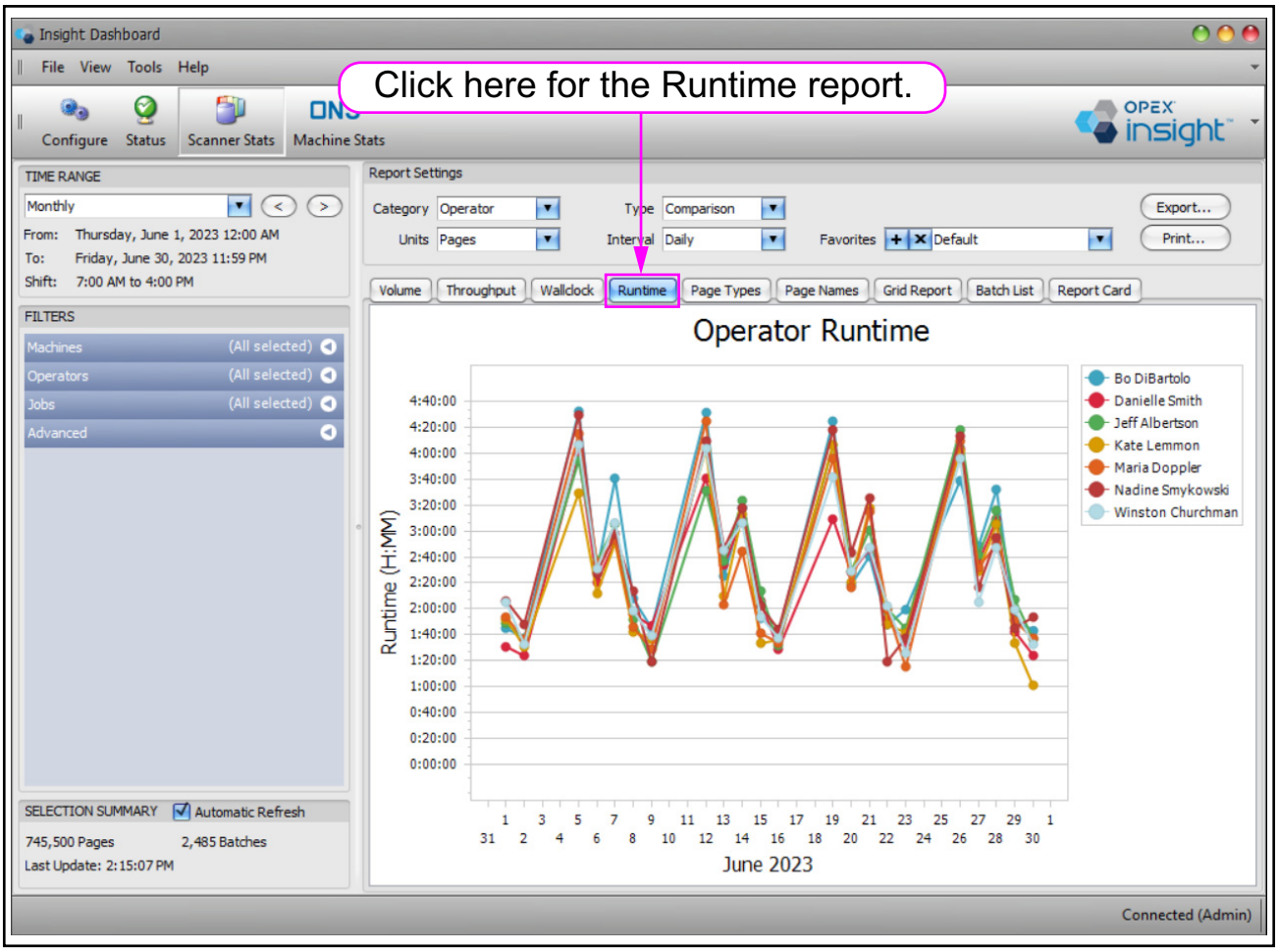


Figure 4-60: Runtime Report

4.6.5.1. Runtime Report - Example 1

1. Set **Report Settings** as in Table 4-12.

Table 4-12: Report Settings for Runtime Report Example 1

Category	Units	Type	Interval
Operator	N/A	Comparison	Daily

- The resulting report is a comparison of the daily runtime in hours, minutes, and seconds for each operator (Figure 4-61).
- The report is a line graph with one line for each operator.
- The lines in the graph are color-coded, based on the key shown to the right of the graph.

2. Hover the cursor over a point in one of the lines to display information for that point, such as operator name, amount of runtime, and date.

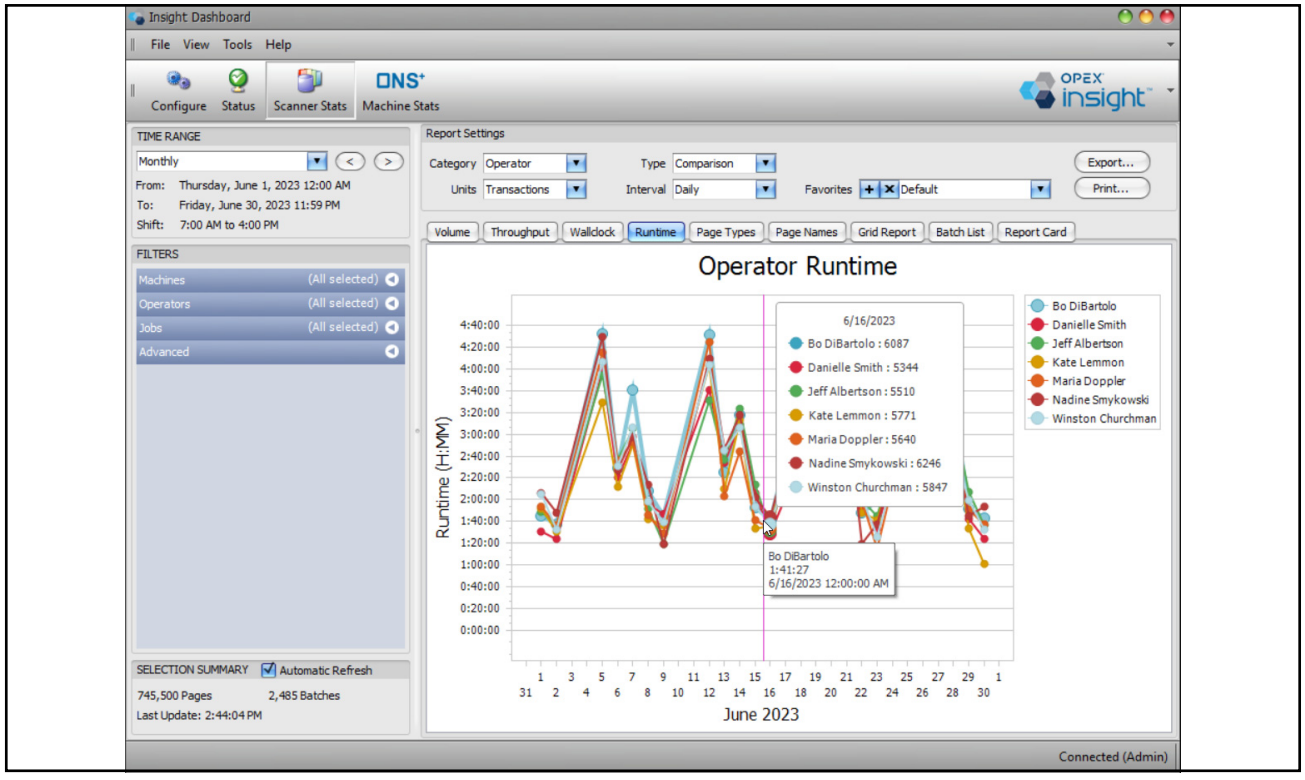


Figure 4-61: Runtime report - example 1

4.6.5.2. Runtime Report - Example 2

1. Set **Report Settings** as in Table 4-13. The report displays the weekly total runtime in hours, minutes, and seconds for each Job (Figure 4-62).

Table 4-13: Report Settings for Runtime Example 2

Category	Units	Type	Interval
Job	N/A	Total	Weekly

- The report is a bar graph.
- Since the **Interval** setting is now set to `Weekly`, one bar is displayed for each week during the selected time range.
- The segments in each bar represent the relative runtime for each Job.
- The segments are color-coded, based on the key shown to the right of the graph.

2. Hover your cursor over a segment in one of the bars to display information for that segment, such as Job name, amount of runtime, and date.

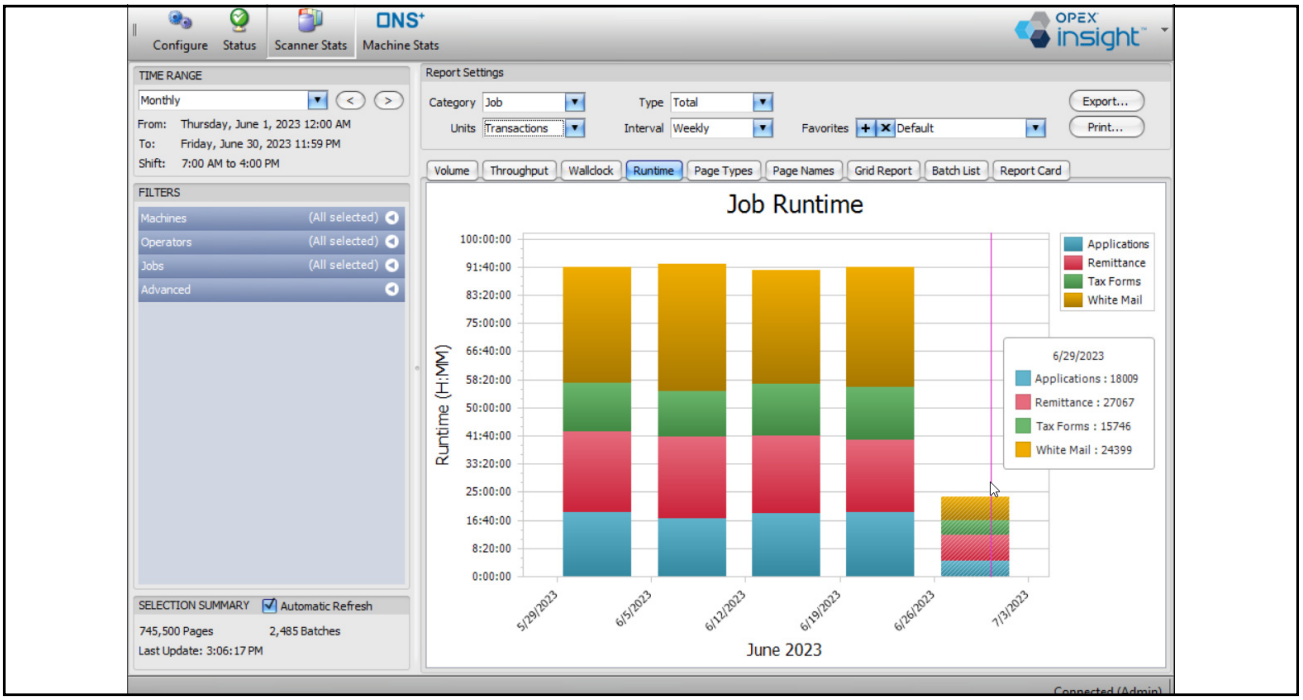


Figure 4-62: Runtime report - example 2

4.6.5.3. Runtime Report - Example 3

1. Set **Report Settings** as in Table 4-14. The resulting report displays the daily runtime in hours, minutes, and seconds for each individual machine (Figure 4-63).

Table 4-14: Report Settings for Runtime Example 3

Category	Units	Type	Interval
Machine	N/A	Individual	Daily

   - Since the report is set to runtime by machine, there is a separate page in the report for each individual machine.

2. Hover your cursor over one of the bars to display information for that bar, such as machine name, runtime, and date.

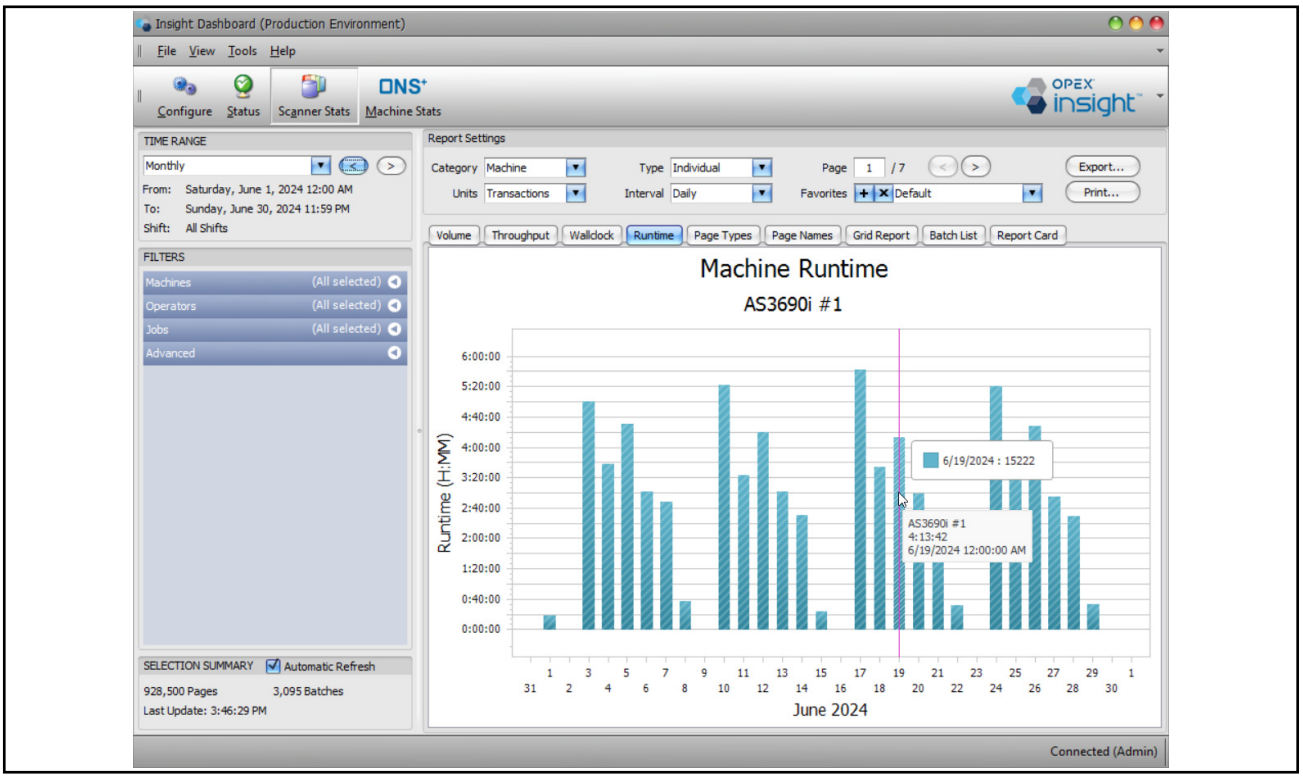


Figure 4-63: Runtime report - example 3

3. Change **Interval** to `Day of Week`. The runtime report displays a separate page for each day of the week (Figure 4-64).

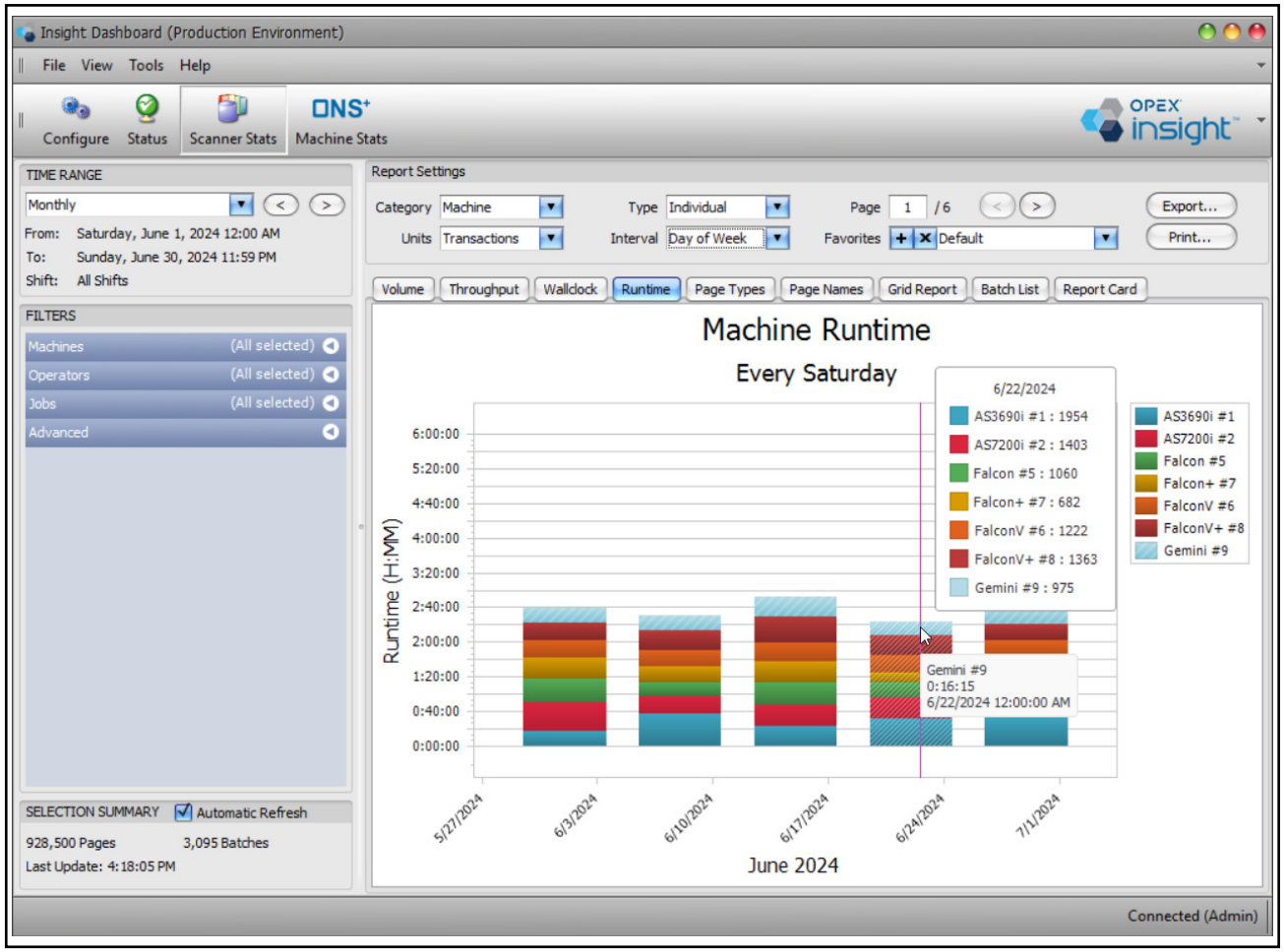


Figure 4-64: Setting the Interval to Day of Week

4.6.6. Page Types Report

The Page Types report provides volume statistics for each page type that was scanned (Figure 4-65).

1. Click the **`Page Types`** tab to access the Scanner Statistics Page Types report.
2. Set the **TIME RANGE** and **Filters** as usual.
3. Use the **Report Settings > Category** drop-down arrow to select whether you want to see the page types broken down by **`Operator`**, **`Machine`**, **`Job`**, or **`Summary`**.

   Note: *The* **Type**, **Units**, *and* **Interval** *settings are not used for the page types report and can be ignored.*

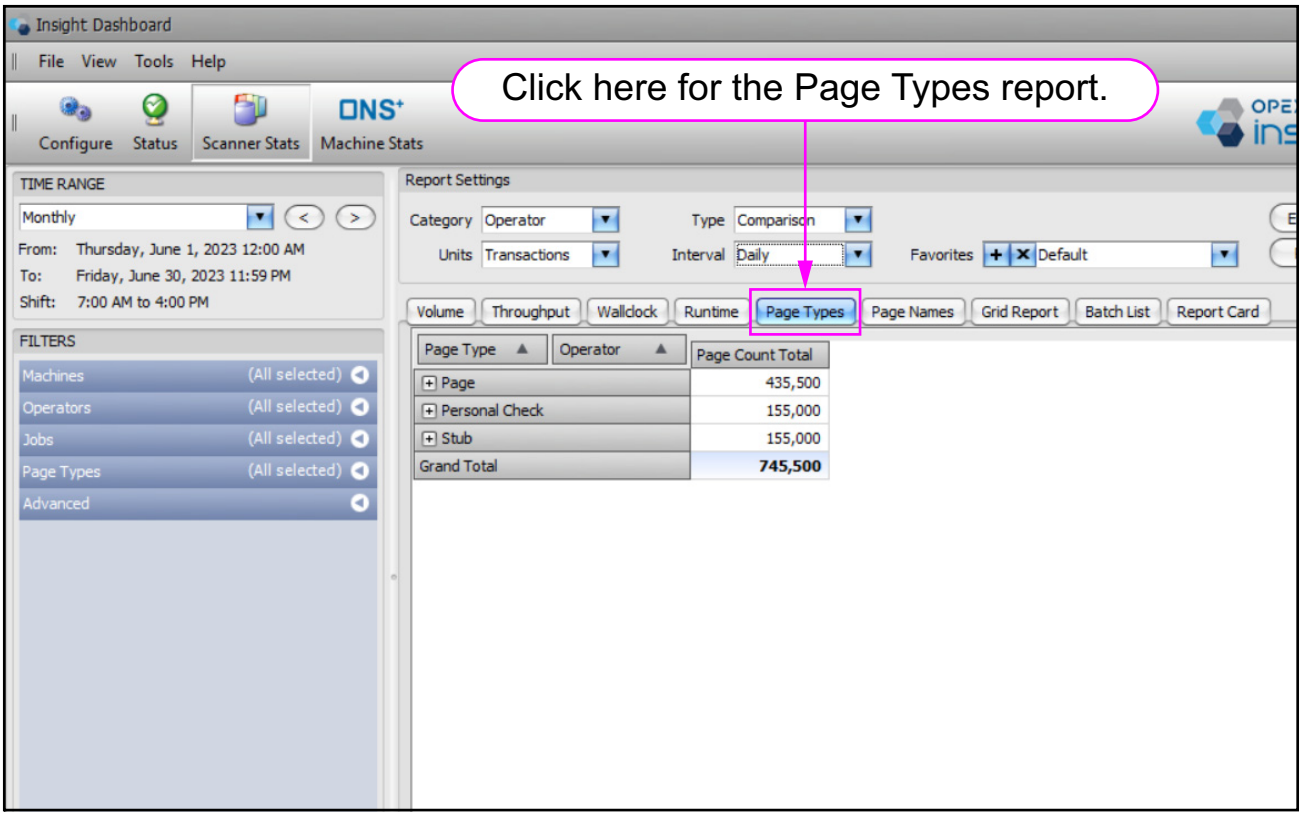


Figure 4-65: Page Types report

4.6.6.1. Page Types Report - Example 1

1. In **`Report Settings`**, set **Category** to **`Operator`**. The resulting report displays the total pages scanned during the specified time range, broken down by page type and operator (Figure 4-66).
   - The report is in the form of a grid.
   - The report includes a row for each page type scanned during the selected time period.

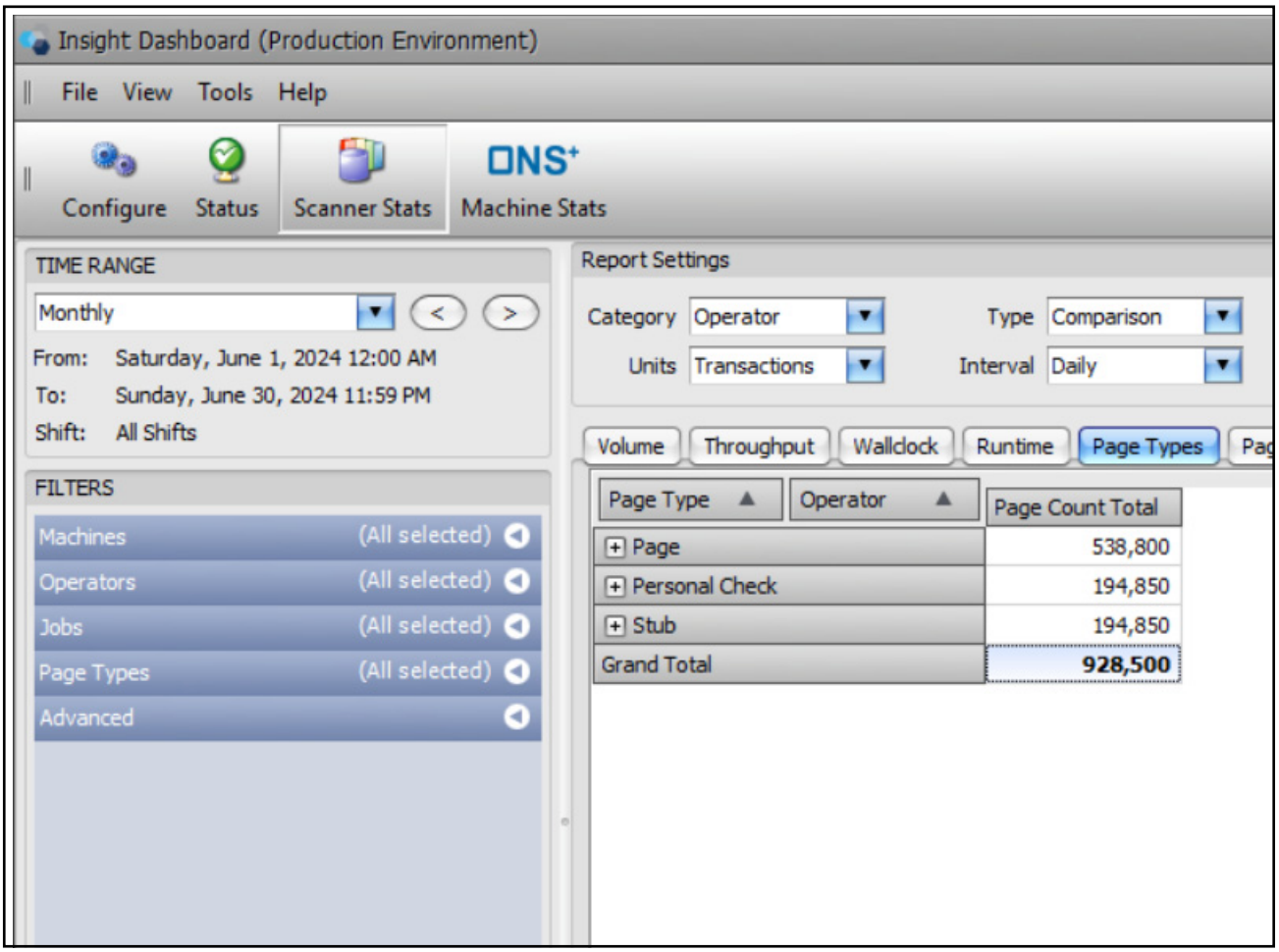


Figure 4-66: Page Types report - example 1

2. In the **Page Type** column, click on the plus (+) sign next to a page name to expand the page name information in the second column (the **Operator** column in this example). The grid displays total pages of that page type scanned by each individual operator (Figure 4-67).

3. Click on the negative (-) sign next to a page name to contract page name information in the second column (Figure 4-67).

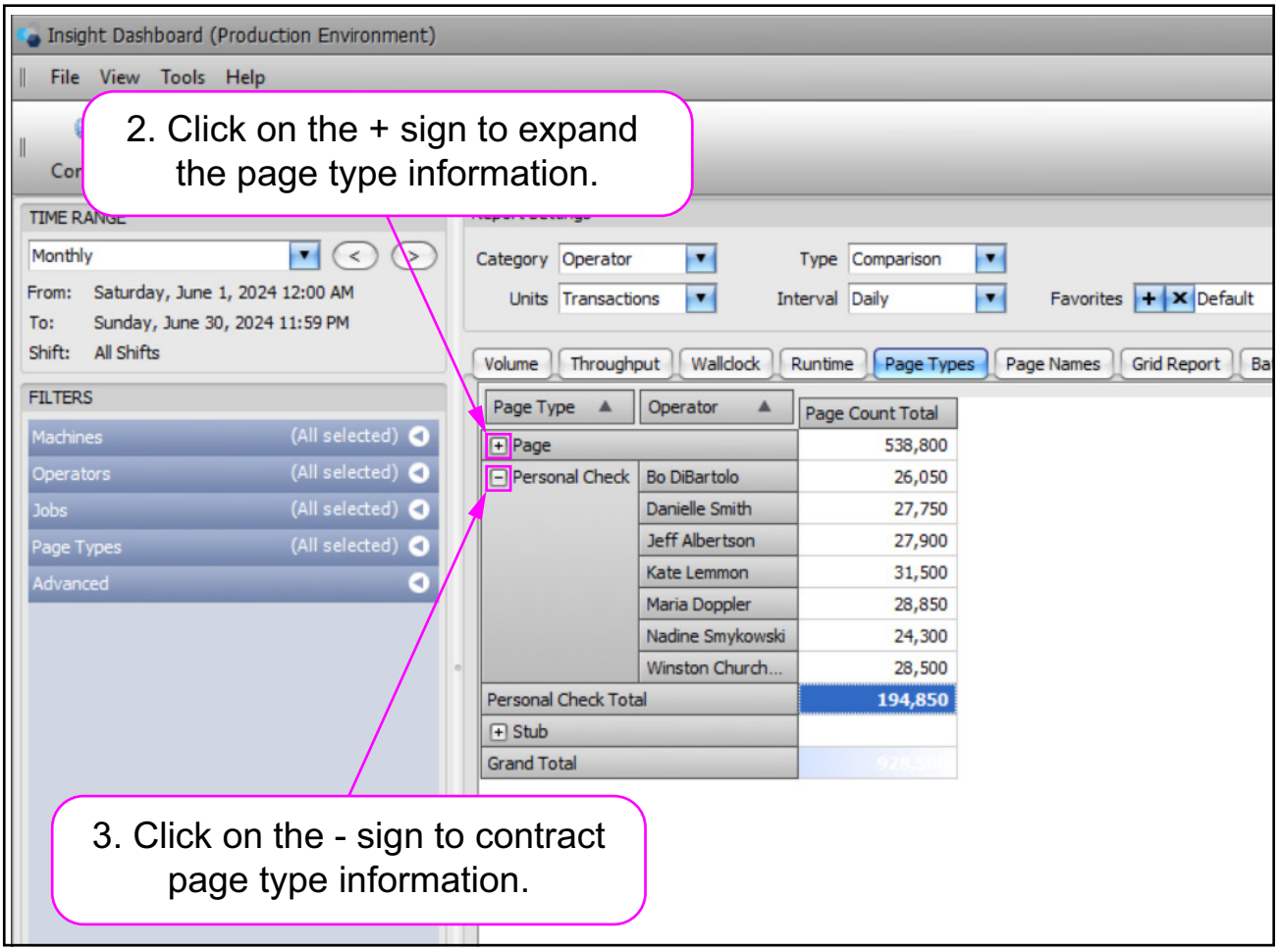


Figure 4-67: Expanding and contracting page type information

4. To sort by **Page Count Total**, right-click on `Page Type Total` and select from the sorting menu (Figure 4-68).

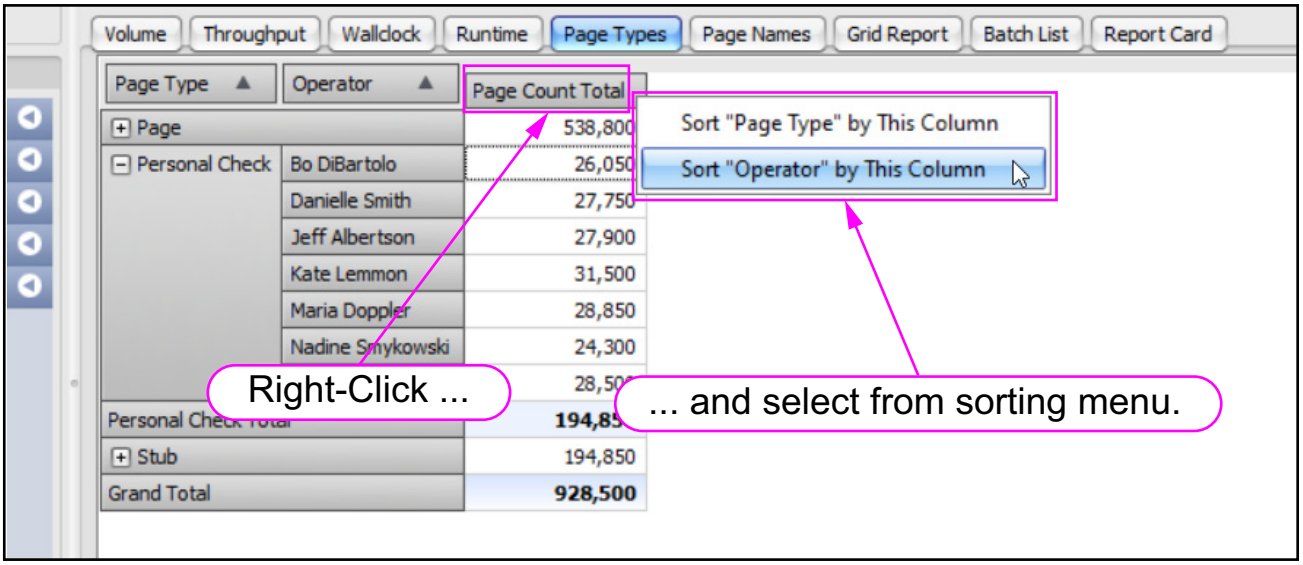


Figure 4-68: Sorting by Page Count Total

4. To remove all sorting, right-click on `Page Type Total` and select `Remove All Sorting` (Figure 4-69).

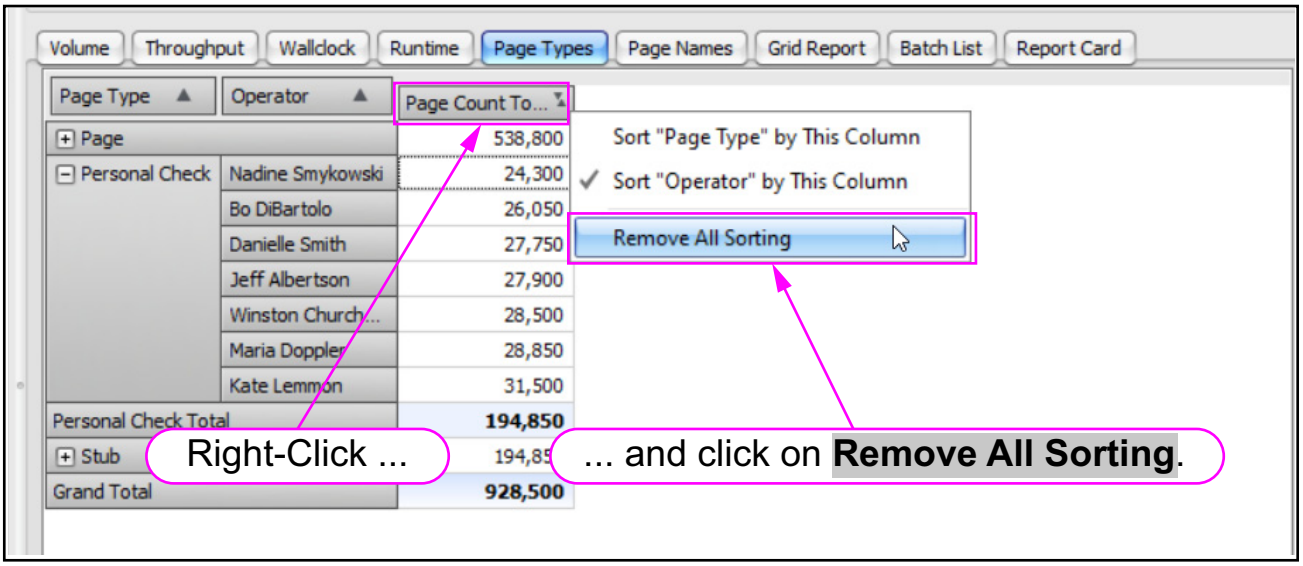


Figure 4-69: Remove All Sorting

4.6.7. Page Names Report

The Page Names report provides volume statistics for each page name that was scanned (Figure 4-70).

1. Click the **`Page Names`** tab to access the Scanner Statistics Page Names report.
2. Use the page names report the same way as the page types report.

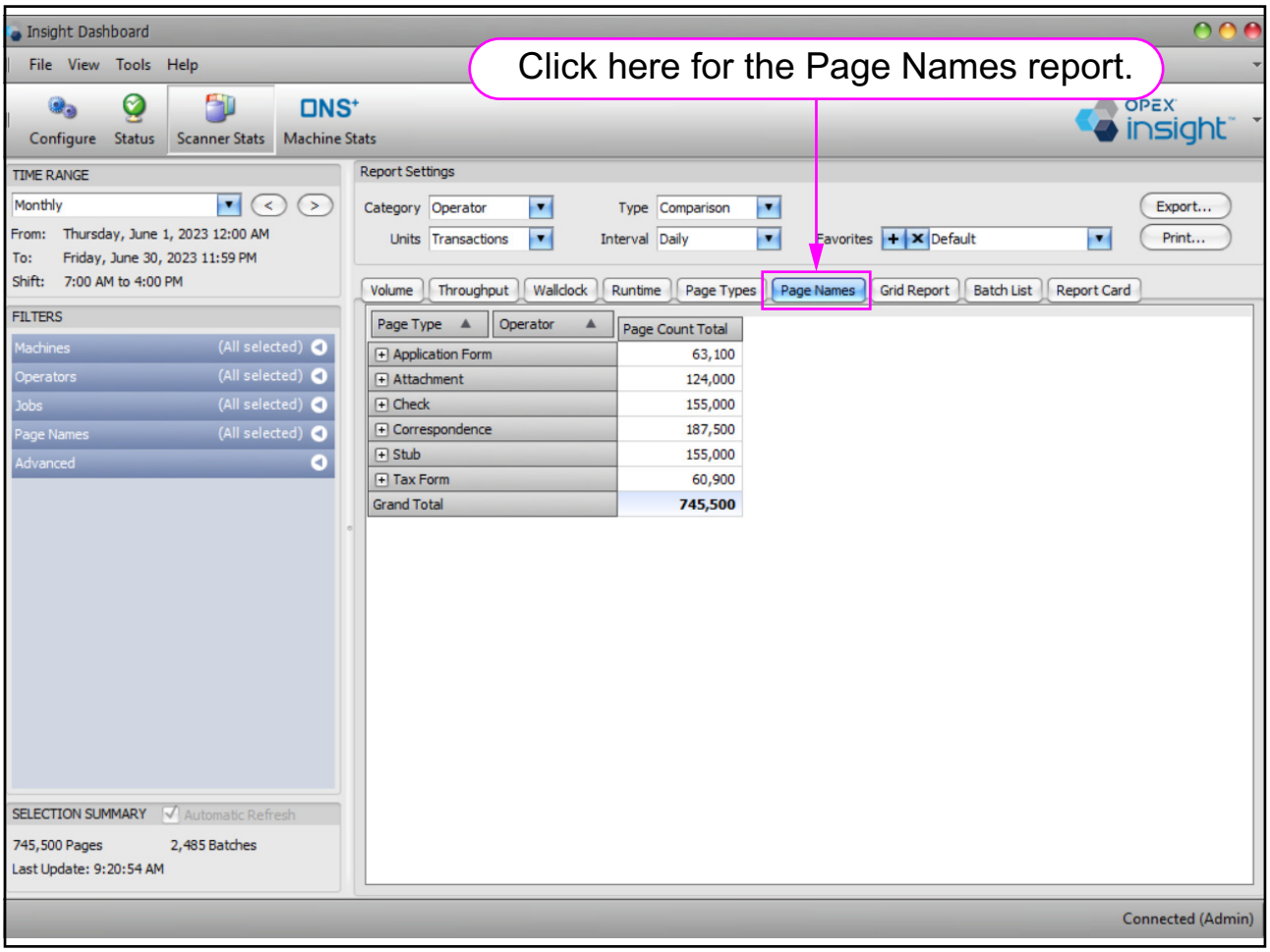


Figure 4-70: Page Names report

4.6.8. Grid Report

The Scanner Stats Grid Report provides volume, throughput, and runtime statistics in a tabular format (Figure 4-71).

1. Click the **`Grid Report`** tab to access the Scanner Stats Grid Report.
2. Set the **TIME RANGE** and **Filters**.+
3. Set the specific Report Settings for the grid report:
   a. The **Category** drop-down determines the contents of column 1 in the grid. It can be set to **`Operator`**, **`Machine`**, **`Job`**, or **`Summary`**.
   b. The **Sub-Category** determines the contents of column 2 in the grid. It can be set to **`Machine`**, **`Job`**, or **`Time Range`**.
   c. The **Units** drop-down determines the units for column 3 in the grid. It can be set to **`Batches`**, **`Transactions`**, or **`Pages`**.
   d. The **Interval** drop-down will only be available when the **Sub-Category** is set to **`Time Range`**. The interval can be set to **`Daily`**, **`Weekly`**, **`Monthly`**, or **`Day of Week`**.

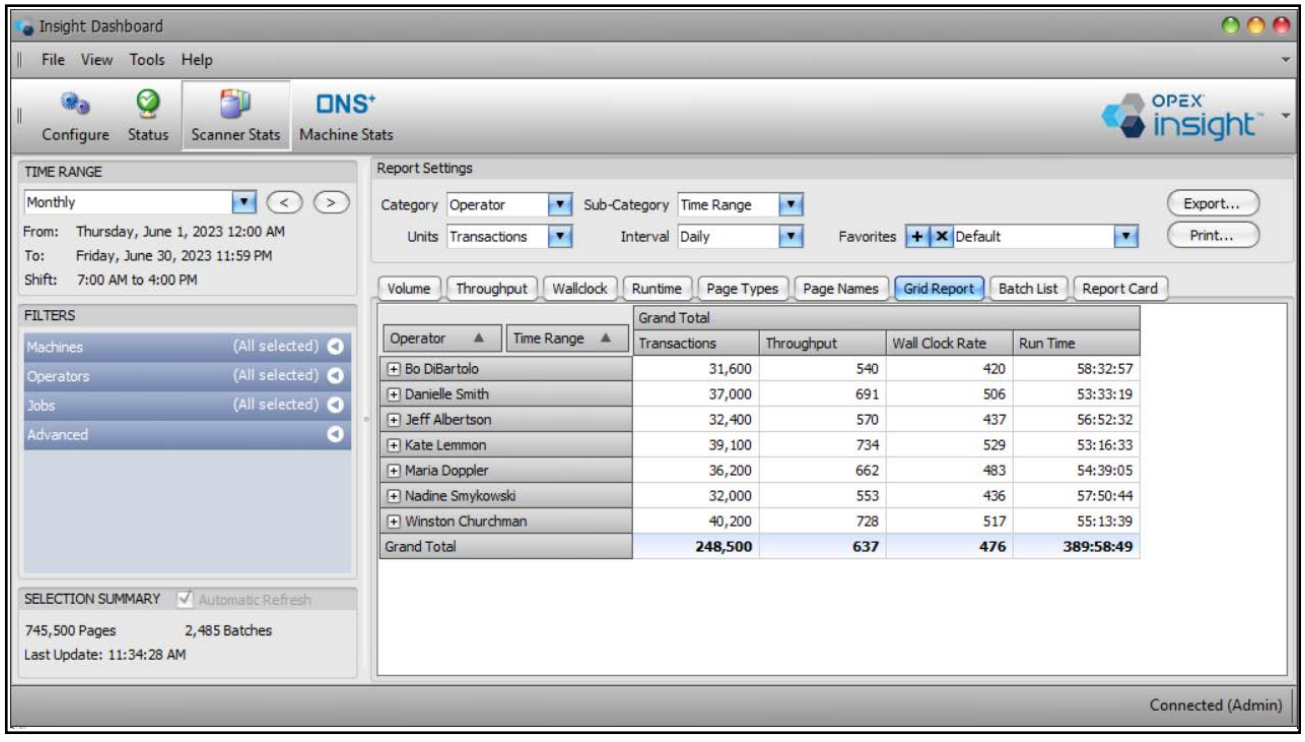
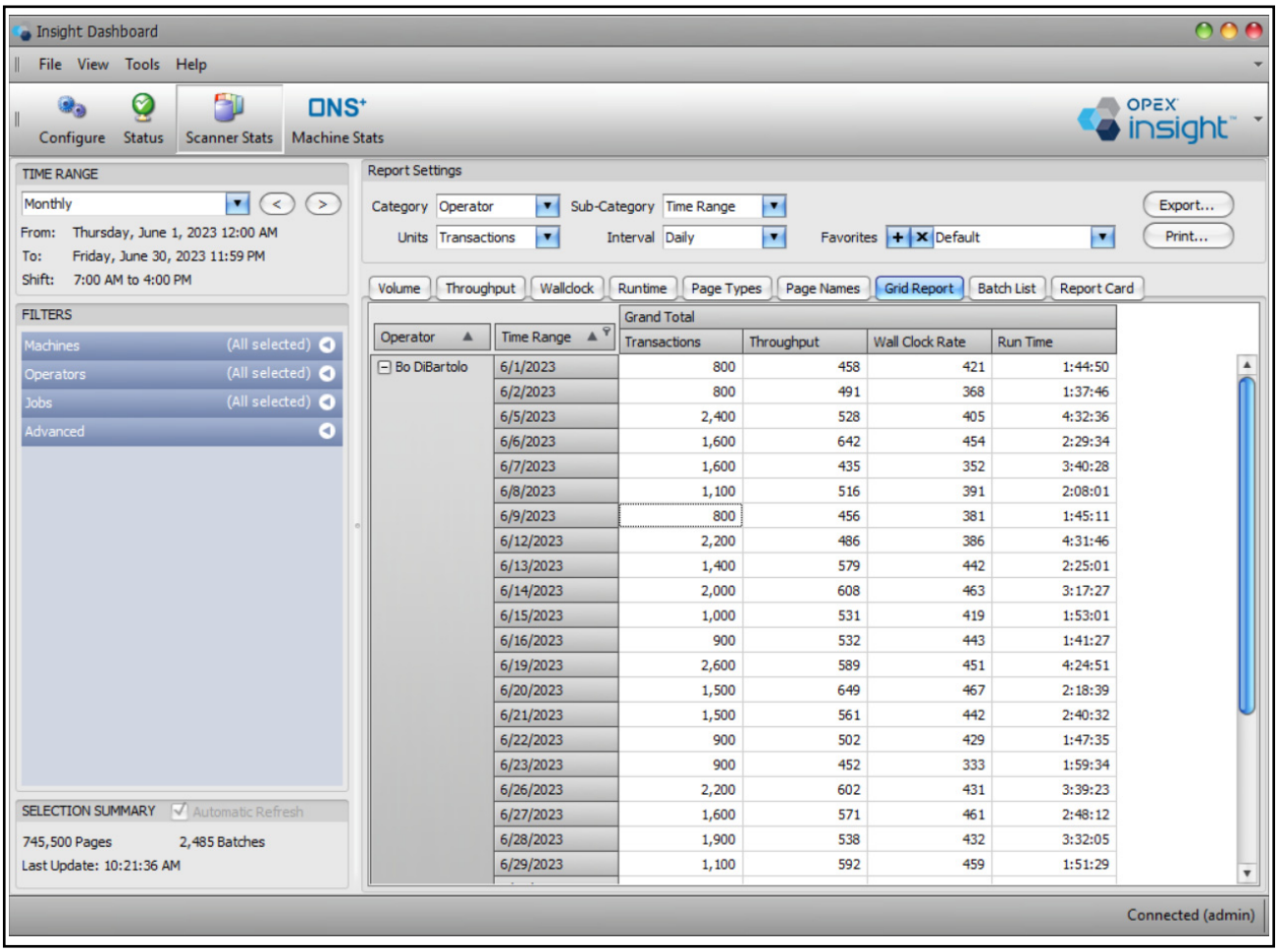


Figure 4-71: Grid report

4. Click on the plus (+) sign and minus(-) sign in column 1 to expand or contract column 2 for each item in column 1. If all of the data does not fit, a scrollbar permits viewing all of the data (Figure 4-72).



Operator	Time Range	Grand Total Transactions	Throughput	Wall Clock Rate	Run Time
Bo DiBartolo	6/1/2023	800	458	421	1:44:50
	6/2/2023	800	491	368	1:37:46
	6/5/2023	2,400	528	405	4:32:36
	6/6/2023	1,600	642	454	2:29:34
	6/7/2023	1,600	435	352	3:40:28
	6/8/2023	1,100	516	391	2:08:01
	6/9/2023	800	456	381	1:45:11
	6/12/2023	2,200	486	386	4:31:46
	6/13/2023	1,400	579	442	2:25:01
	6/14/2023	2,000	608	463	3:17:27
	6/15/2023	1,000	531	419	1:53:01
	6/16/2023	900	532	443	1:41:27
	6/19/2023	2,600	589	451	4:24:51
	6/20/2023	1,500	649	467	2:18:39
	6/21/2023	1,500	561	442	2:40:32
	6/22/2023	900	502	429	1:47:35
	6/23/2023	900	452	333	1:59:34
	6/26/2023	2,200	602	431	3:39:23
	6/27/2023	1,600	571	461	2:48:12
	6/28/2023	1,900	538	432	3:32:05
	6/29/2023	1,100	592	459	1:51:29

Figure 4-72: Clicking on the plus sign in column 1

4.6.8.1. Grid Report - Example 1

Set the **Report Settings** as shown in Table 4-15. The report displays data in grid form for the transactions scanned during the specified time range, broken down by operator and machine (Figure 4-73).

The report includes:

- The list of operators (in the **Operator** column) who used a scanner during the defined time period.
- The total number of **Transactions** each operator ran.
- The **Throughput** in transactions per hour.
- The **Wall Clock Rate** in transactions per hour.
- The total **Run Time** that the operator spent during the defined time period.

Note: *The throughput and wall clock rate are in units of transactions per hour, because the* **Units** *report setting is set to* `Transactions`.

Table 4-15: Report Settings for Grid Report Example 1

Category	Units	Sub-Category
Operator	Transactions	Machine

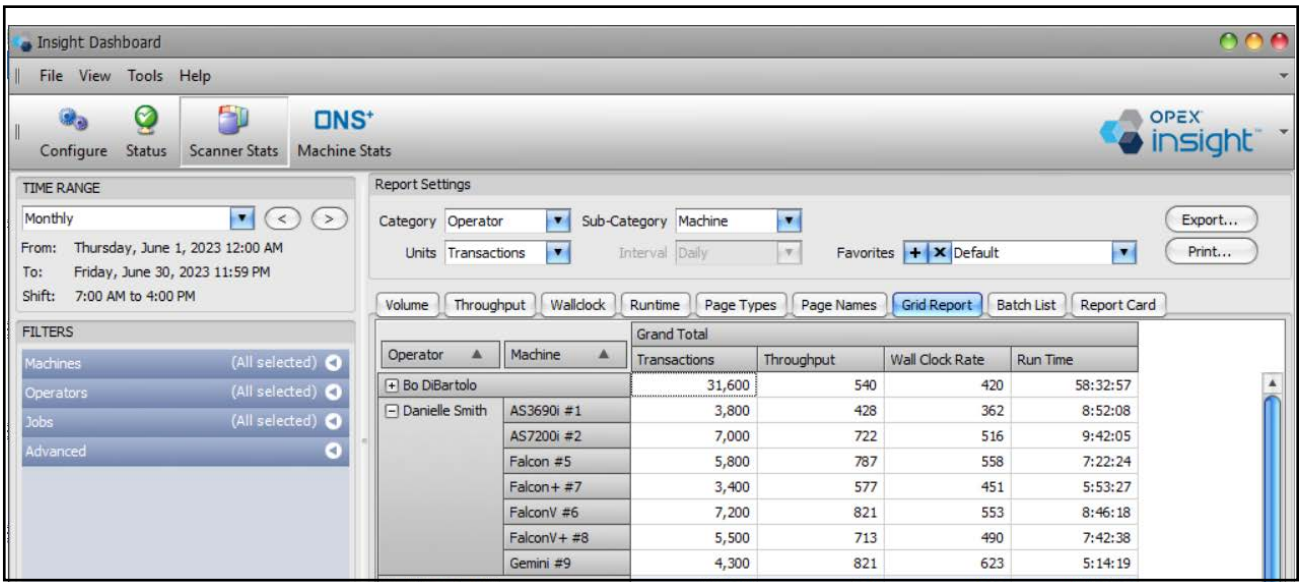


Figure 4-73: Grid Report - example 1

4.6.8.2. Grid Report - Example 2

1. Set the **Category** report setting to `Job`.
2. Set the **Sub-Category** report setting to `Time Range`. Since the **Sub-Category** has been set to `Time Range`, the **Interval** setting is enabled.
3. Set **Interval** to `Weekly` (Figure 4-74).

- This grid report shows the weekly total transactions scanned for each Job run during the specified time range.

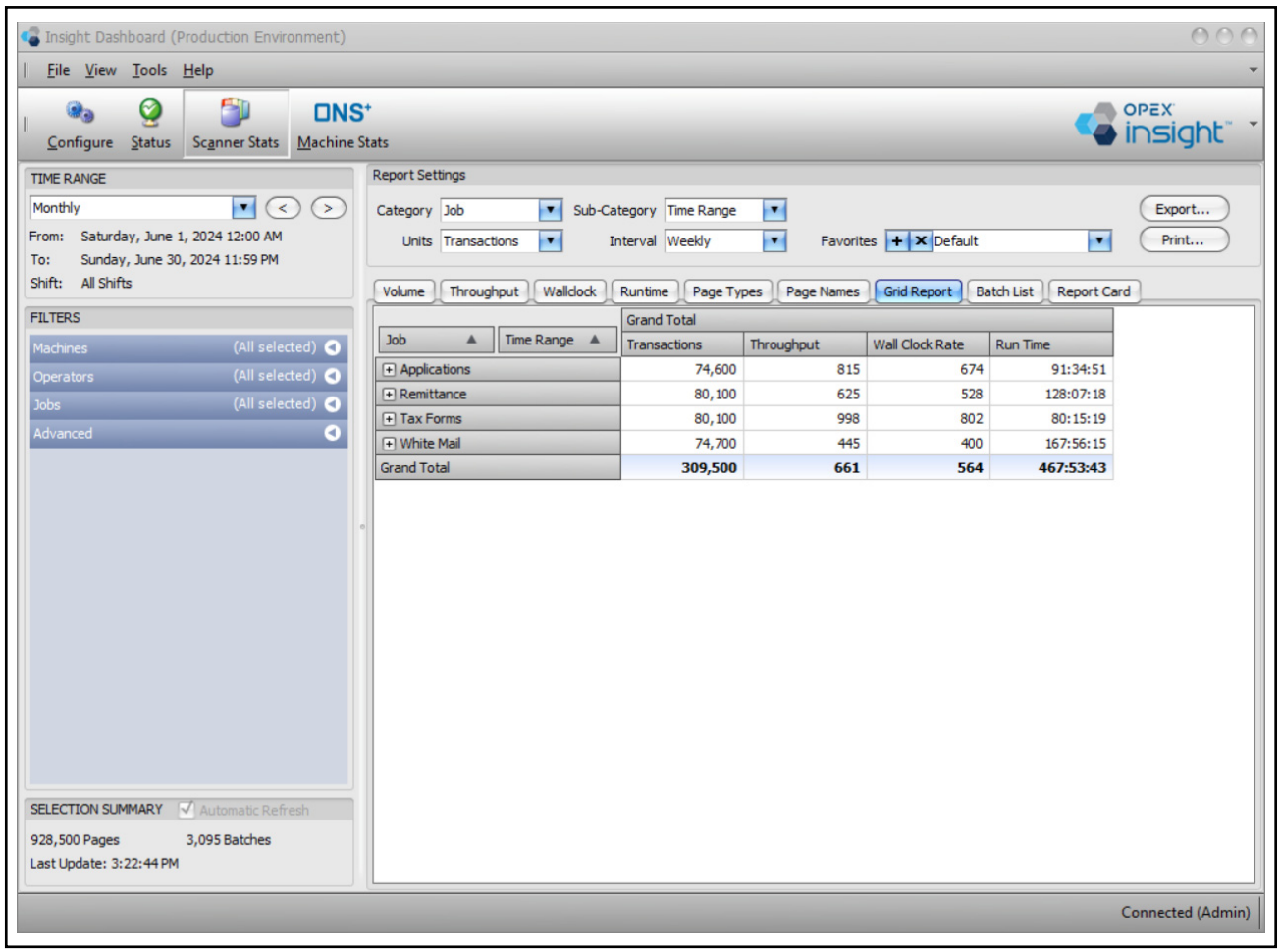
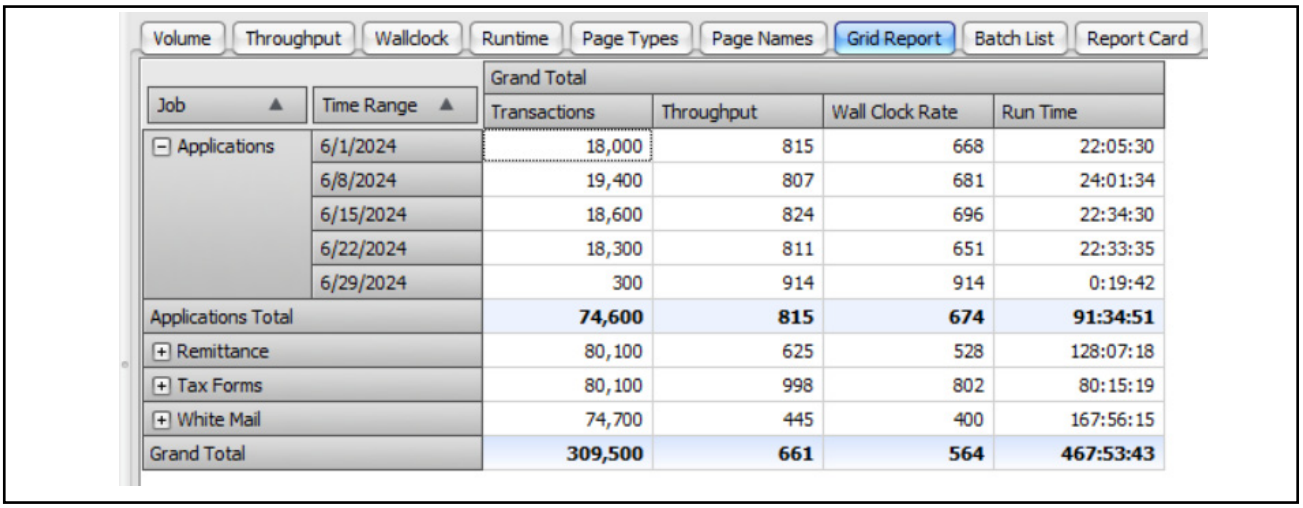


Figure 4-74: Grid Report - example 2

4. Expand names in the **Job** column to expand the information in the **Time Range** column. The grid displays the following for the specified time range (Figure 4-75):
   - The number of **Transactions** ran each week for each Job.
   - The **Throughput** for each Job.
   - The **Wall Clock Rate** for each Job.
   - The total **Run Time** achieved for each Job.



Job	Time Range	Grand Total Transactions	Throughput	Wall Clock Rate	Run Time
⊟ Applications	6/1/2024	18,000	815	668	22:05:30
	6/8/2024	19,400	807	681	24:01:34
	6/15/2024	18,600	824	696	22:34:30
	6/22/2024	18,300	811	651	22:33:35
	6/29/2024	300	914	914	0:19:42
Applications Total		**74,600**	**815**	**674**	**91:34:51**
⊞ Remittance		80,100	625	528	128:07:18
⊞ Tax Forms		80,100	998	802	80:15:19
⊞ White Mail		74,700	445	400	167:56:15
Grand Total		**309,500**	**661**	**564**	**467:53:43**

Figure 4-75: Expanding a Job

5. As with the Page Types and Page Names reports, the columns can be sorted.

4.6.9. Batch List Report

The Batch List report displays a list of all batches that completed scanning during the time period defined by the **TIME RANGE** setting. (Figure 4-76). The Report Settings have no effect on the batch list report and can be ignored. The batch list report includes details about each batch, such as the following:

- The number of transactions in the batch.
- The scan date for the batch.
- The scan device that was used to scan the batch.
- The Job that was selected on the scanner when the batch was run.
- The current status of the batch.

1. Click the **`Batch List`** tab to access the Batch List report.
2. Set the **TIME RANGE** and **Filters**.

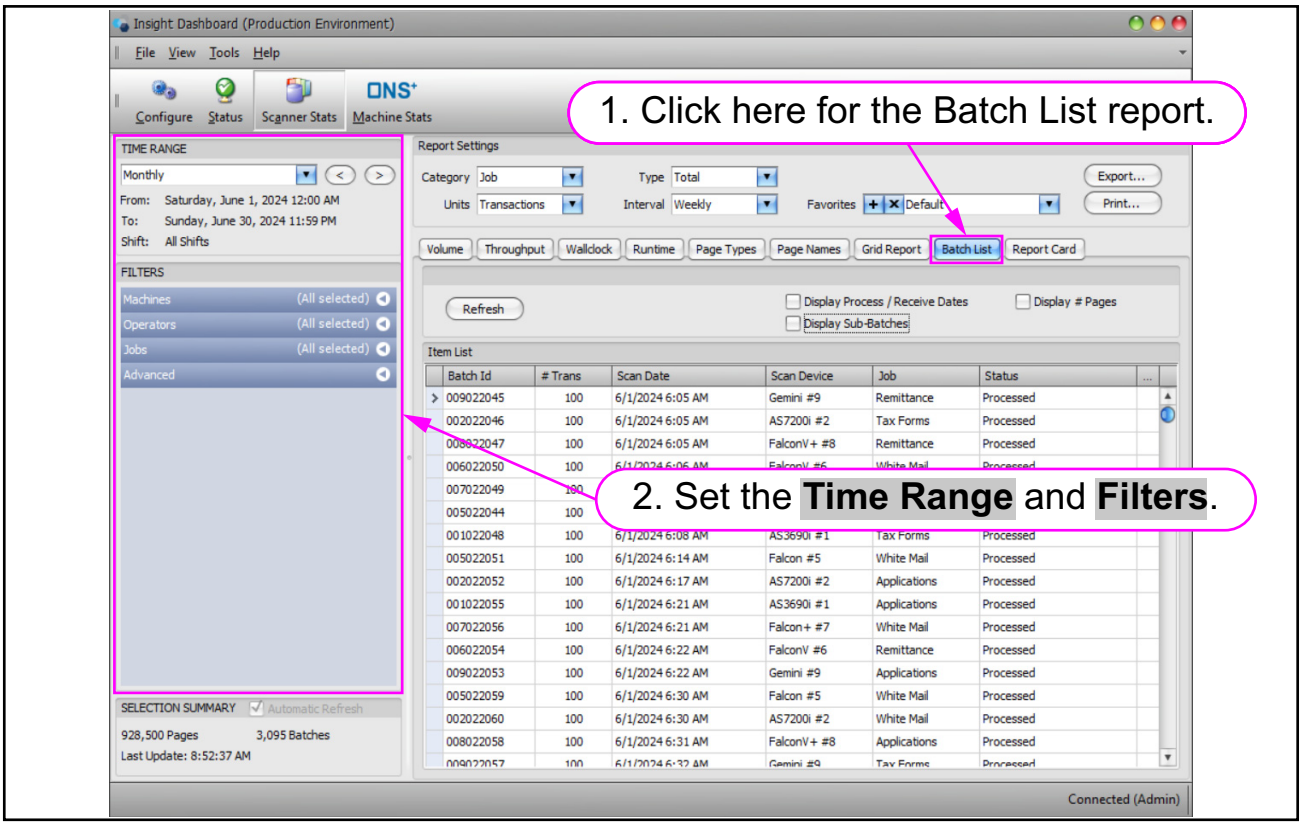


Figure 4-76: Batch List Report

3. If you have the **TIME RANGE** set to a current time period, click the **Refresh** button to display the most current completed batches (Figure 4-77).
4. Check the **Display Process / Receive Dates** box to add columns for the process date and the receive date.
5. Check the **Display # Pages** to display the column for the number of pages in a batch.
6. If your system includes virtual batching, check the **Display Sub-Batches** box to add a column for sub-batches.

Note: *The batch list report can display a maximum of 10,000 batches at once. If you select too large of a time range, you will receive a warning that only the first 10,000 batches have been returned. If this occurs, select a narrower time range, so that no batches are missed.*

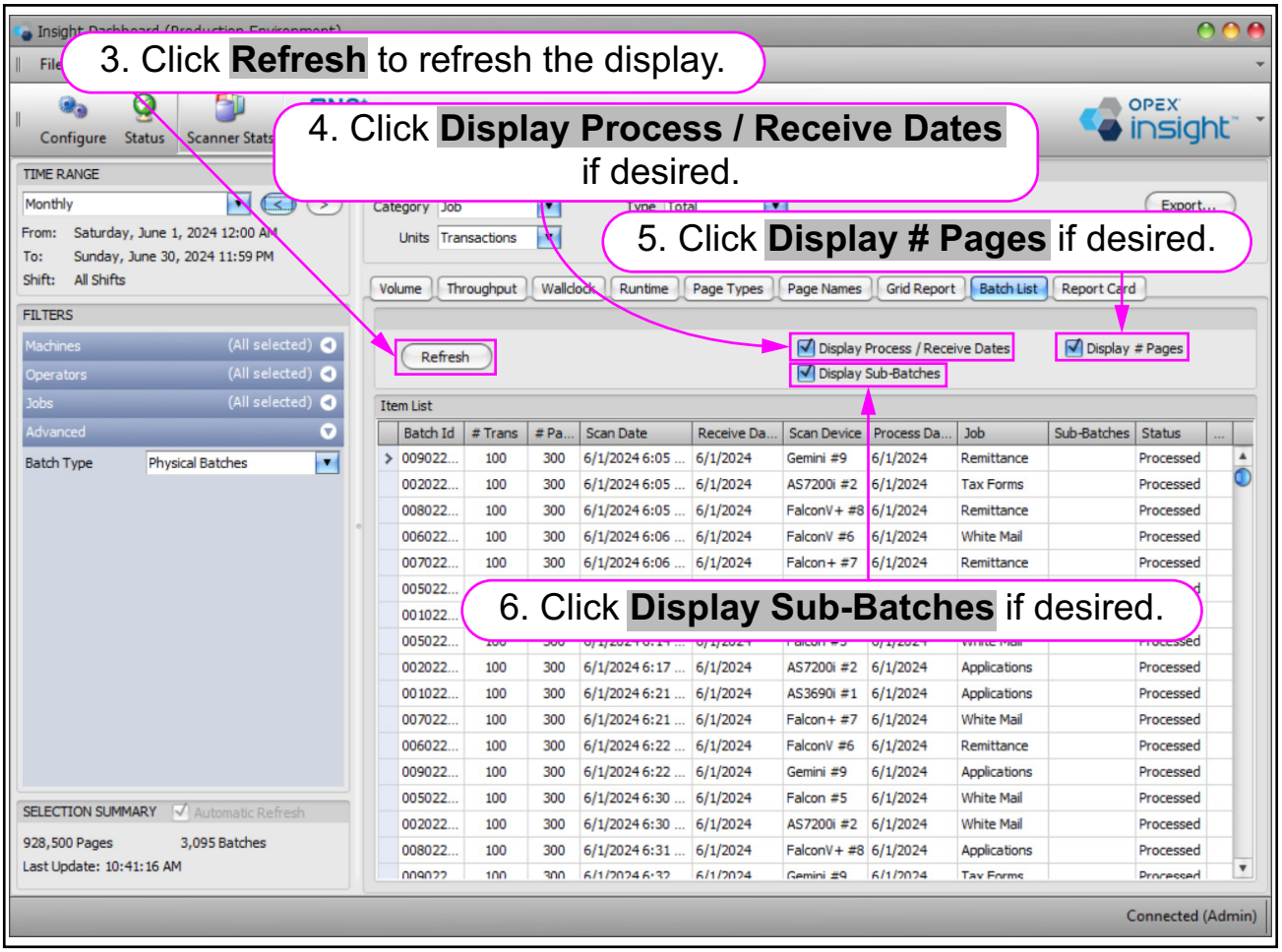


Figure 4-77: Refresh and displaying additional columns

4.6.10. Report Card

The Scanner Stats module Report Card provides volume, throughput, and runtime statistics in an easily-printed tabular format (Figure 4-78).

1. Click the **`Report Card`** tab.
2. Set the **TIME RANGE** and **Filters**.
3. Set the specific **Report Settings** for the report card:

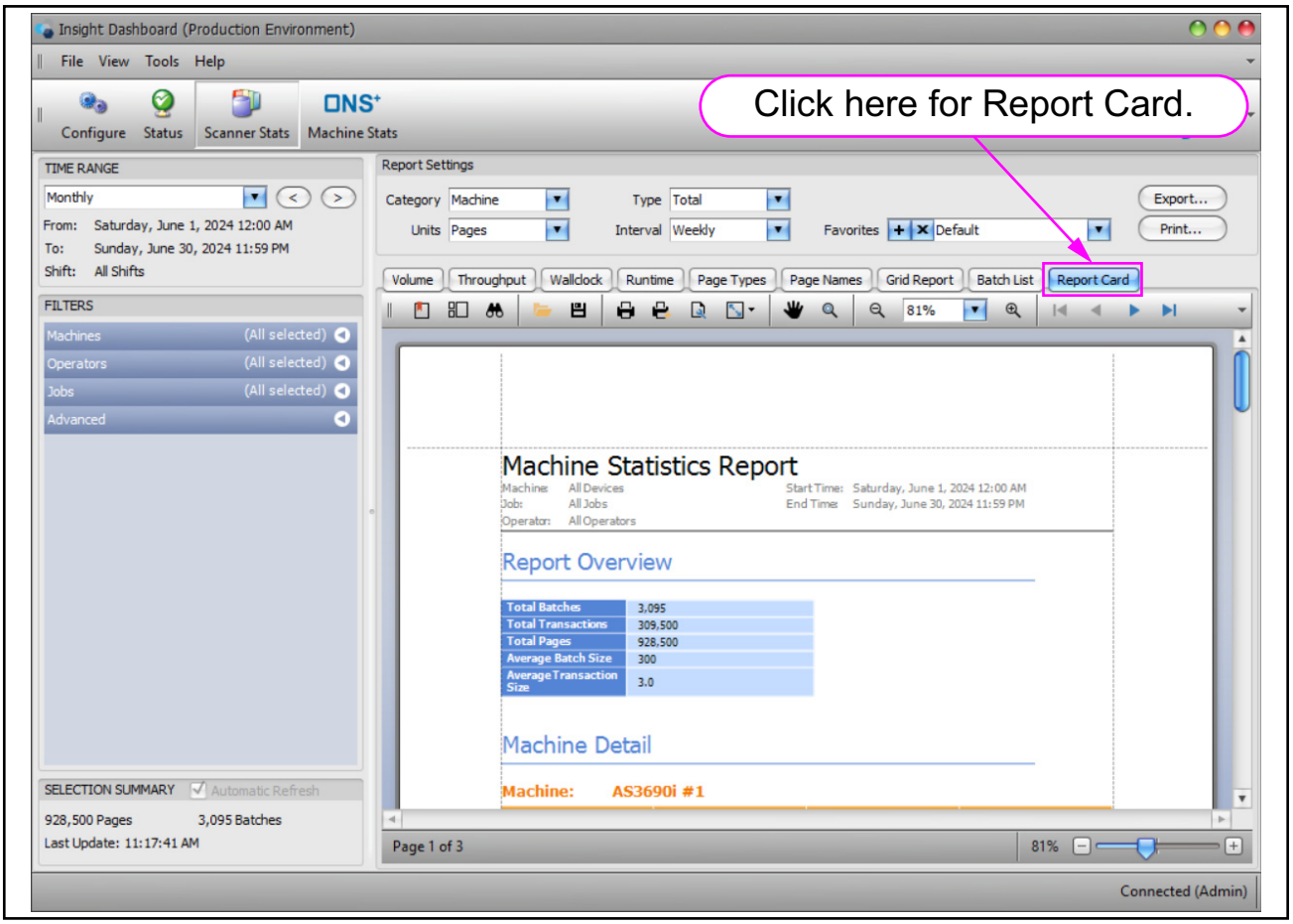


Figure 4-78: Report Card

4. Scroll through the tabulated report card (Figure 4-79).

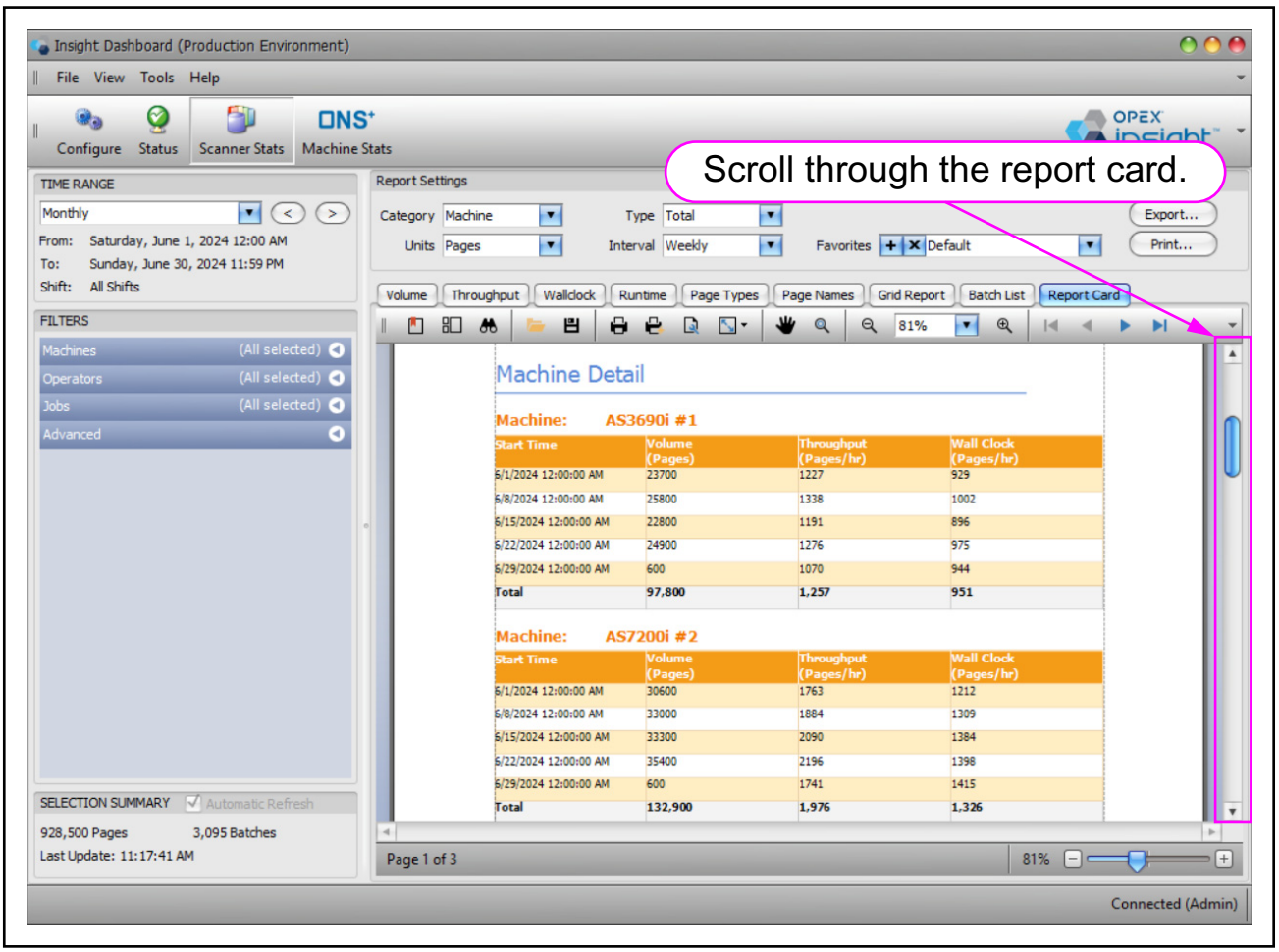


Figure 4-79: Scrolling through the report card.

A Report card can be created for any search criteria that is currently being viewed, including **Favorites**.

4.6.10.1. Report Card Toolbar

At the top of a Report Card is a toolbar (Figure 4-80).

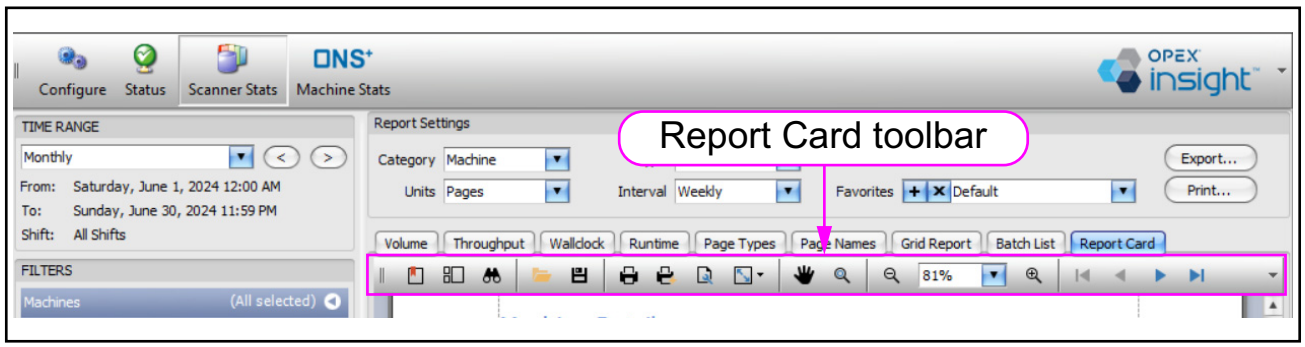


Figure 4-80: Report Card toolbar

Depending on your Insight Dashboard display size, some of the toolbar buttons may be hidden. Two ways to display the hidden buttons are (Figure 4-81):

- Click on the drop-down arrow on the right.
- Maximize the Insight Dashboard display.

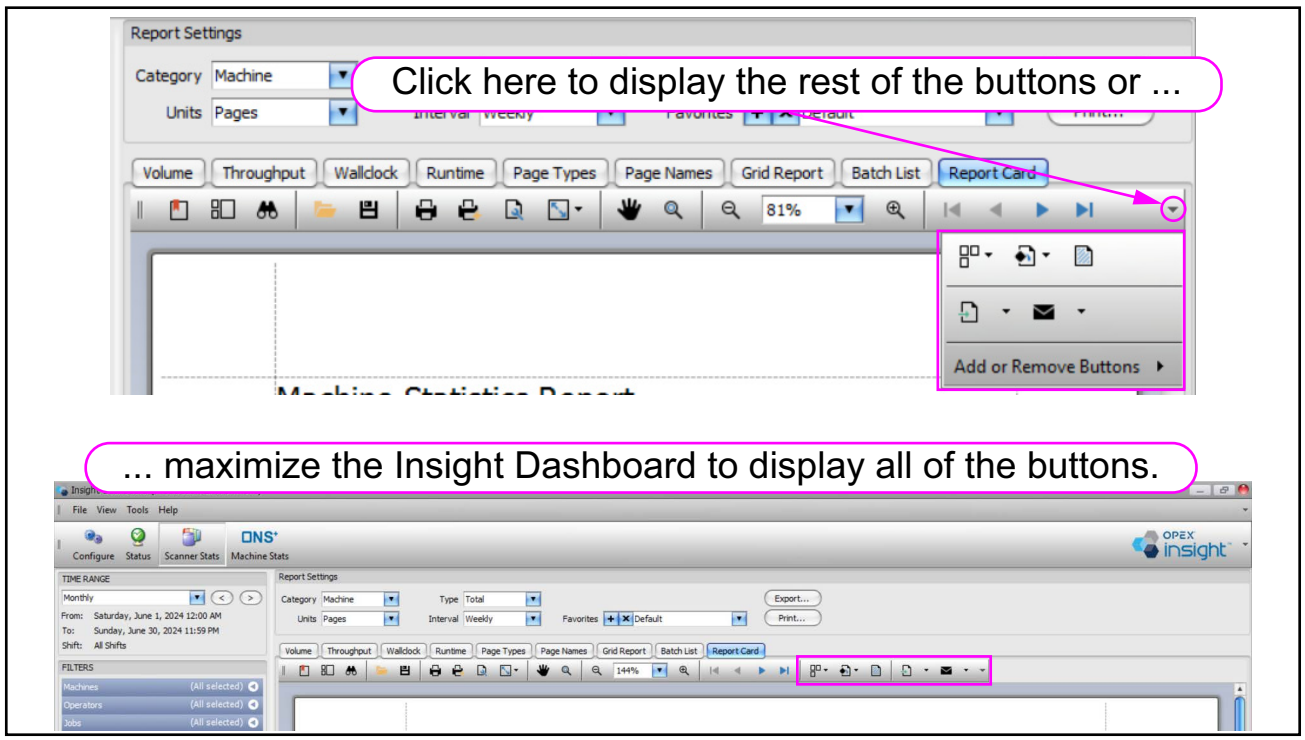


Figure 4-81: Displaying hidden Report Card toolbar buttons

The buttons on the toolbar are (Figure 4-82):

a. Button to open or close the document map at left.
b. Button to open or close thumbnails views of pages.
c. Button to open or close a search box.
d. Button to open a document.
e. Button to save a document.
f. Button to open the print dialog.
g. Button to quickly print with current print settings.
h. Button to open print setup.
i. Button to adjust the scale of the printed image.
j. Button to use the hand tool.
k. Button to use the magnifier tool.
l. Button to zoom in or out.
m. Button to control display of multiple pages.
n. Button to control background color.
o. Button to create a water mark.
p. Buttons for exporting a document.
q. Buttons for emailing a document.
r. Buttons for emailing a document.
s. Buttons to add or remove buttons.

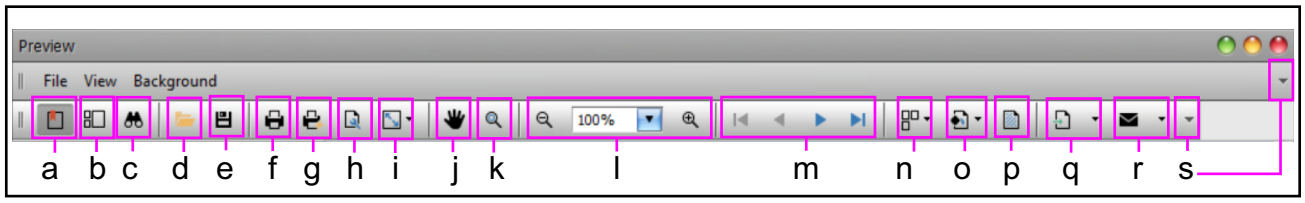


Figure 4-82: Report Card toolbar buttons

Note: *When you hover the cursor above any toolbar button, a tool-tip is displayed to help you remember the function of that button.*

4.7. ONS+ Machine Stats Module Report Types

The ONS+ Machine Stats module has the following report types (Figure 4-83):

- Volume
- Throughput
- Output
- Jams
- Rejects
- Outsorts
- Thick Stack
- Reunites
- Reruns
- Grid Report
- Report Card

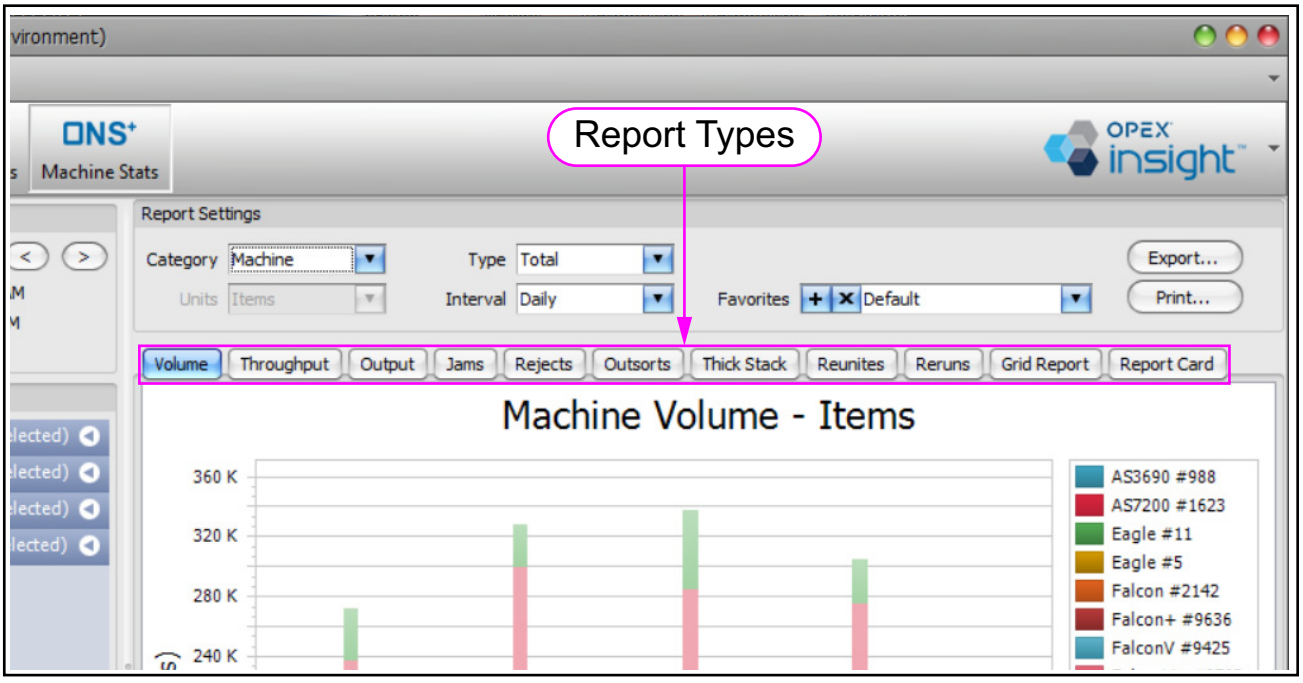


Figure 4-83: ONS+ Machine Stats module report types

4.7.1. Volume Report

The Machine Stats module Volume Report provides statistics on the volume of work handled by your machines (Figure 4-84).

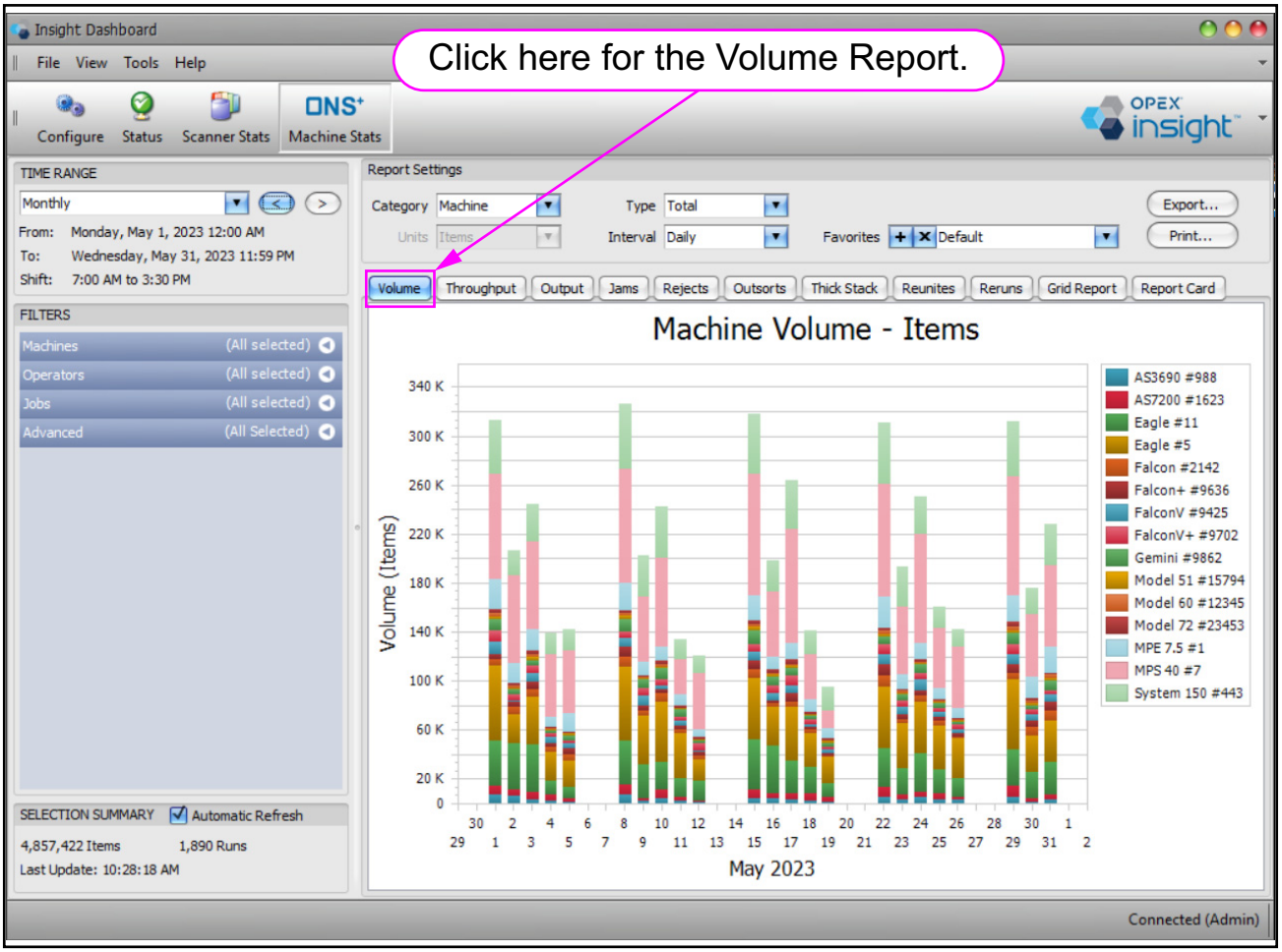


Figure 4-84: Volume Report

4.7.2. Throughput Report

The Machine Stats module Throughput Report provides statistics on the throughput for your machines (Figure 4-85).

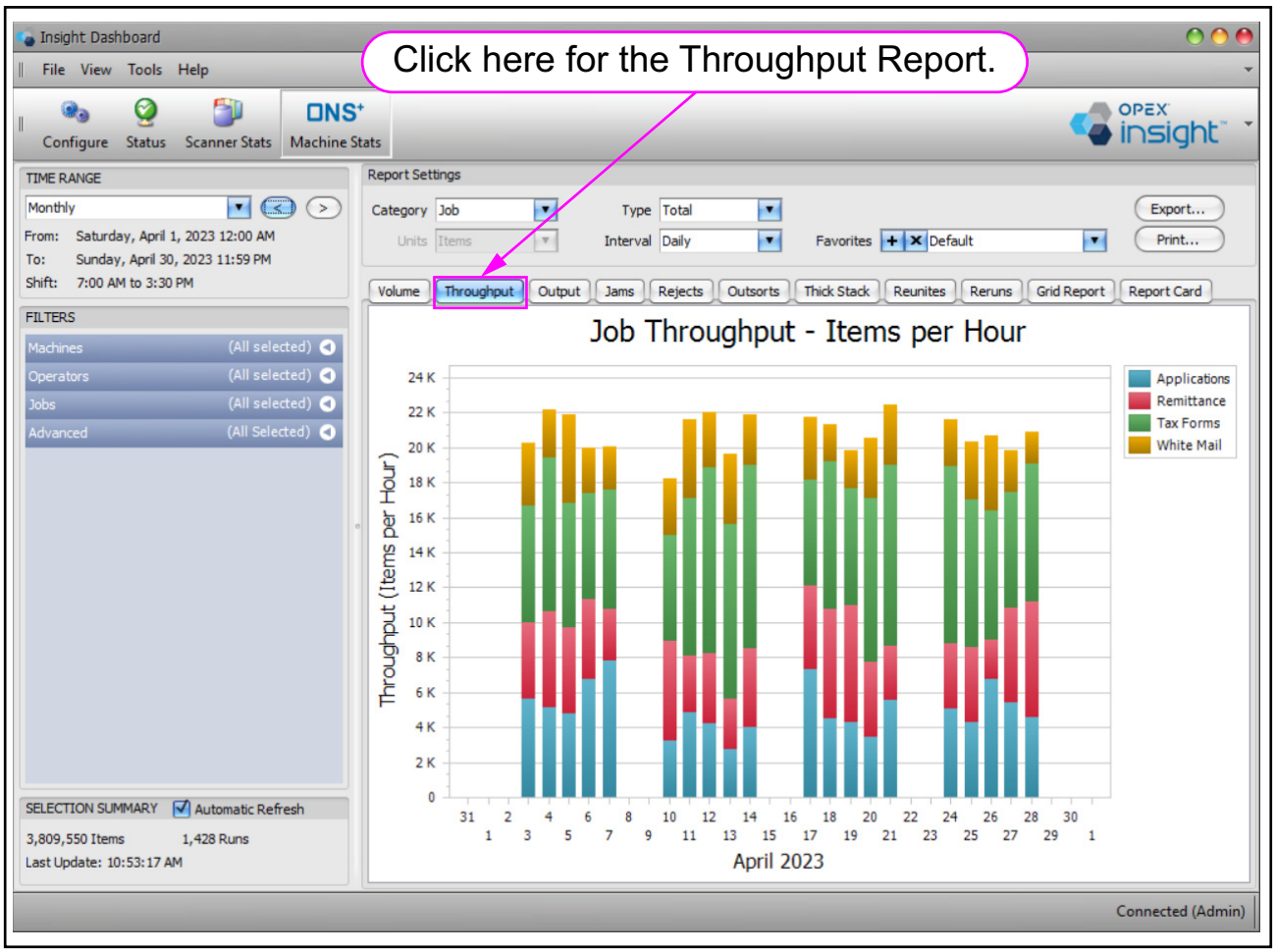


Figure 4-85: Throughput Report

4.7.3. Output Report

The ONS Machine Stats module Output Report provides stats on the output count of your machines. It includes the following display areas (Figure 4-86):

1. **Output Group Detail**
2. **Top Output Groups** pie chart
3. **Output Rate**

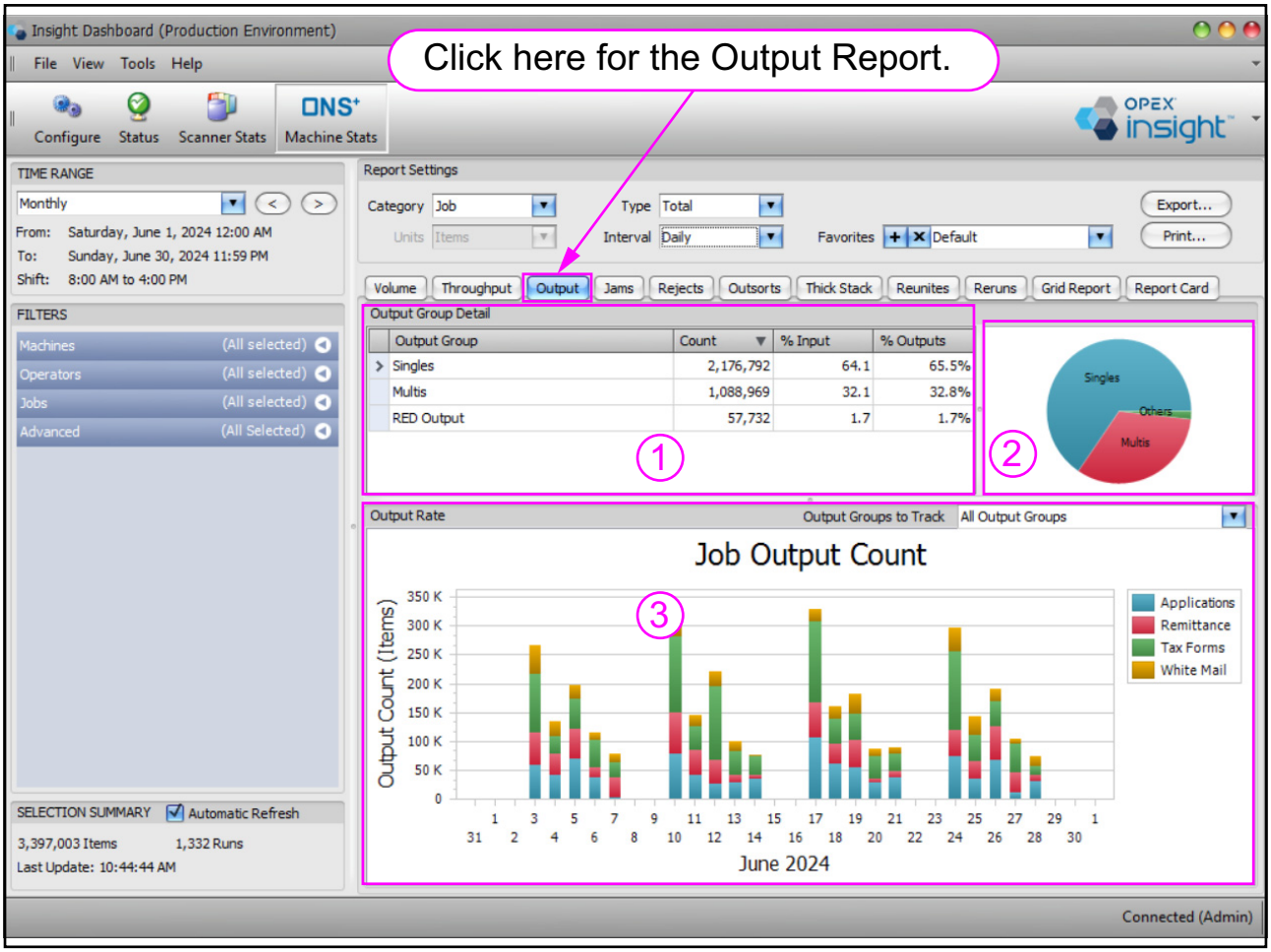


Figure 4-86: Output Report

4.7.3.1. Output Group Detail

The **Output Group Detail** displays details about each group (Figure 4-87):

- **Singles**: Output Count for Singles Transaction.
- **Multis**: Output Count for Multis Transaction.
- **RED Output**: Output Count on RED Equipment.

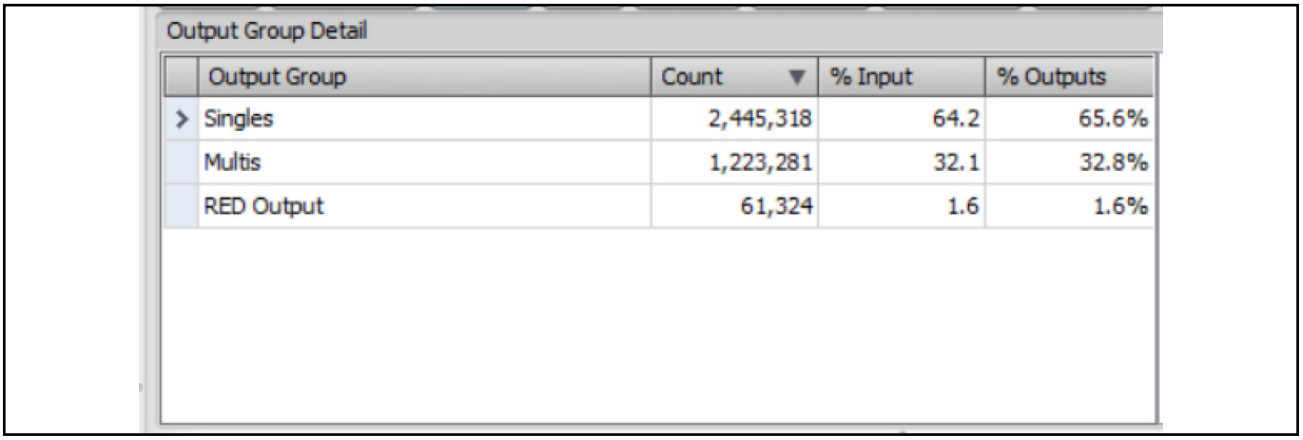


Figure 4-87: Output Group Detail

4.7.3.2. Output Rate

The **Output Rate** section shows a graphical representation of the output count, based on **Filter** and **Report Settings**. It includes a drop-down list from which you can select the group of output data to display (Figure 4-88).

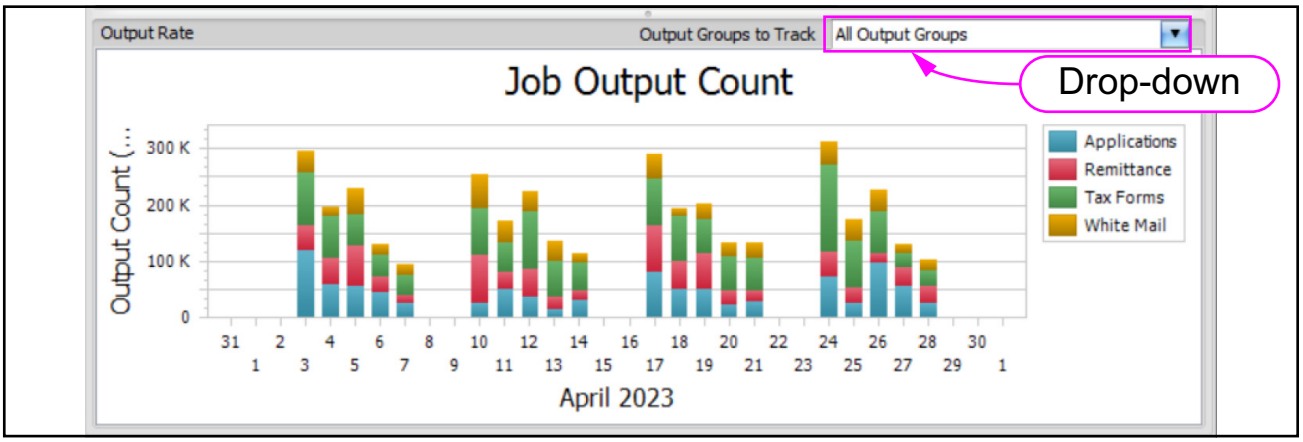


Figure 4-88: Output Rate

4.7.4. Jams Report

The ONS Machine Stats module Jams Report provides statistics on the jams count found on your machine. Jams are reported when a run is halted due to a paper jam or machine processing problem (Figure 4-89).

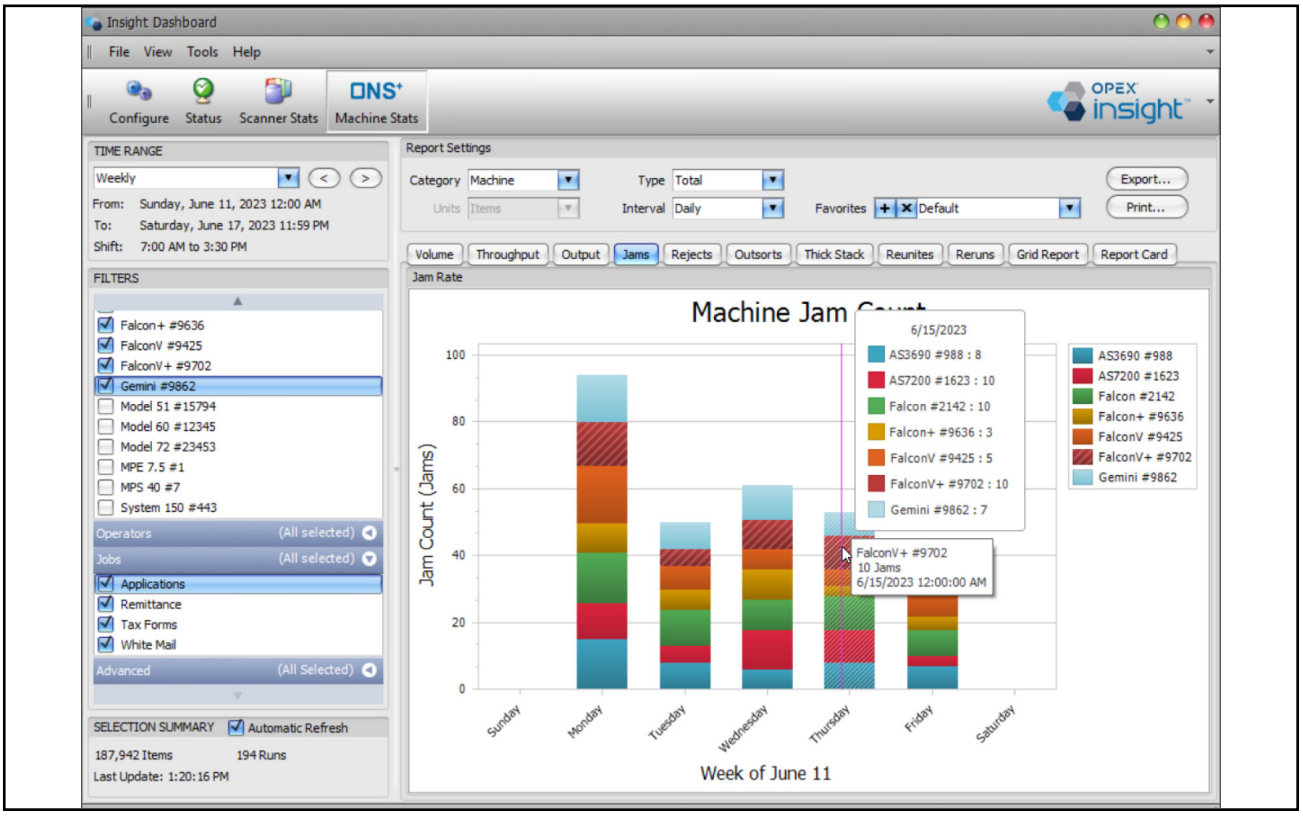


Figure 4-89: Jams Report

4.7.5. Rejects Report

The ONS Machine Stats module Rejects Report provides the number of rejected pieces and reason for rejects. It includes the following display areas (Figure 4-90):

1. **Reject Reason Detail**
2. **Top Reject Reasons** pie chart
3. **Reject Rate**

Figure 4-90 is an example of a **Comparison** report that depicts the Reject Percentage for System 150 and two Eagles during one work week.

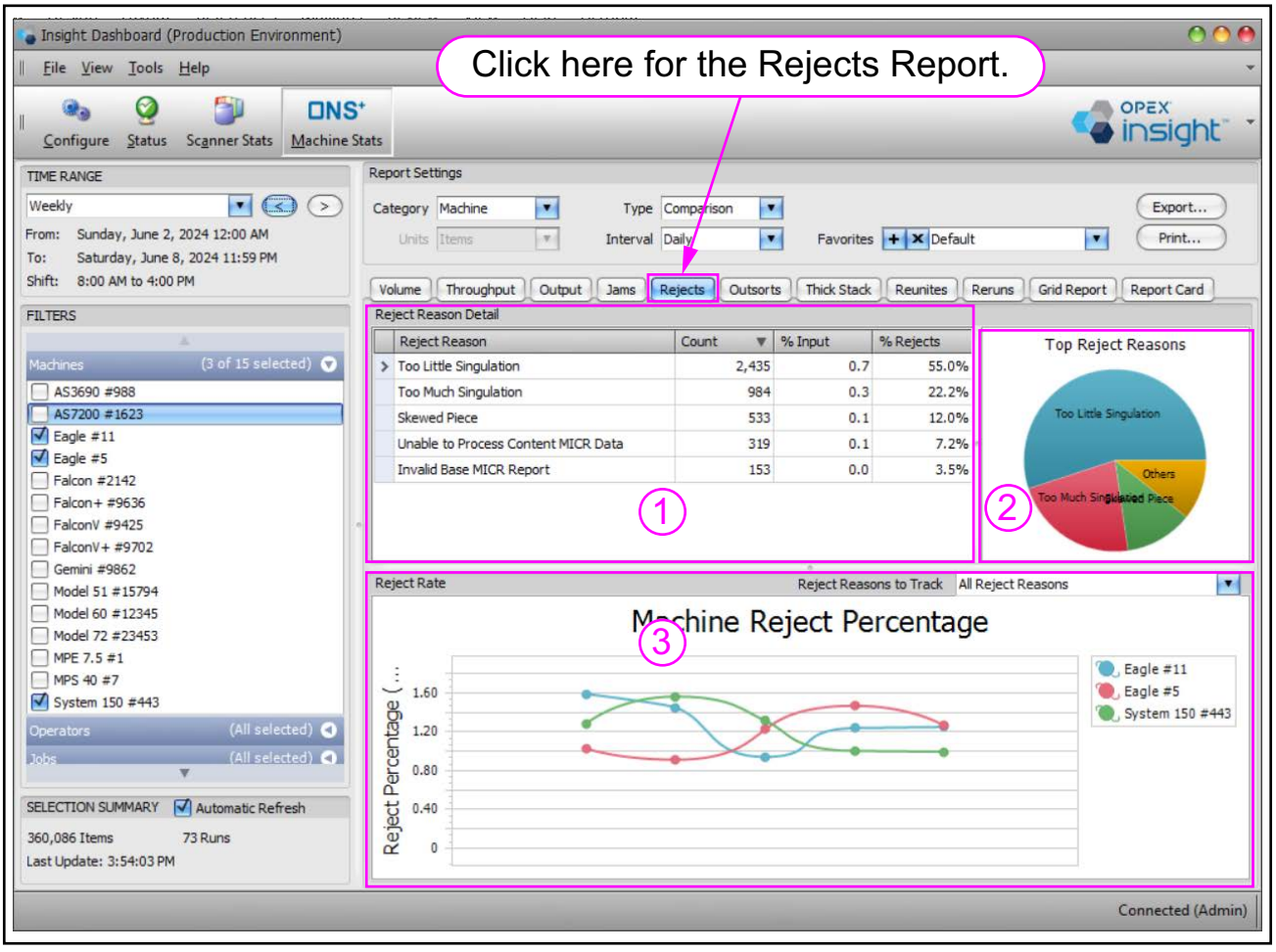


Figure 4-90: Machine Reject Percentage

4.7.5.1. Reject Reason Detail

The **Reject Reason Detail** provides (Figure 4-91):

- Reject Reason
- Count
- % Input
- % Reject

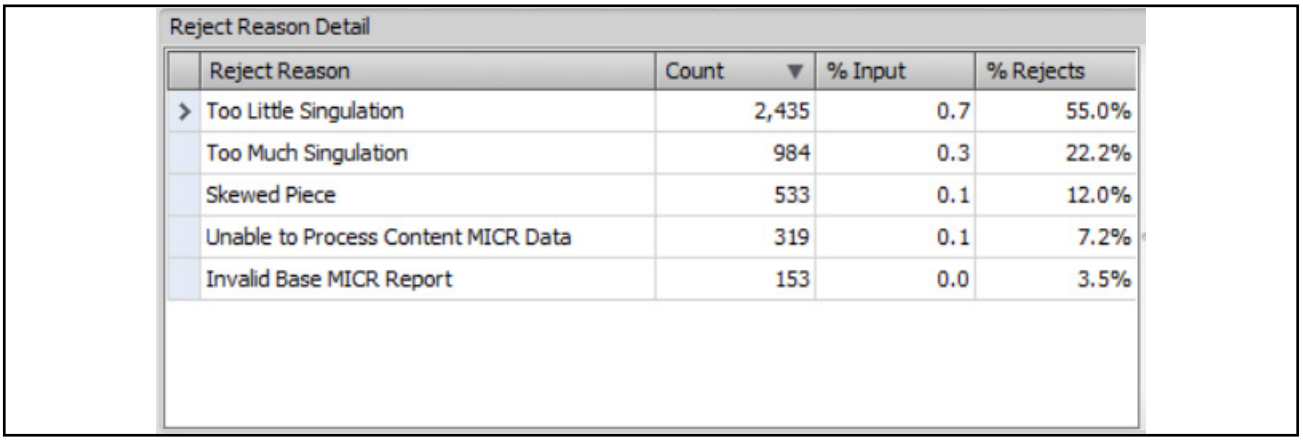


Figure 4-91: Reject Reason Detail

4.7.5.2. Reject Rate

The **Reject Rate** shows a graphical representation of reject percentage, based on **Filter** and **Report Settings**. It includes a selectable drop-down list of reject reasons to track (Figure 4-92).

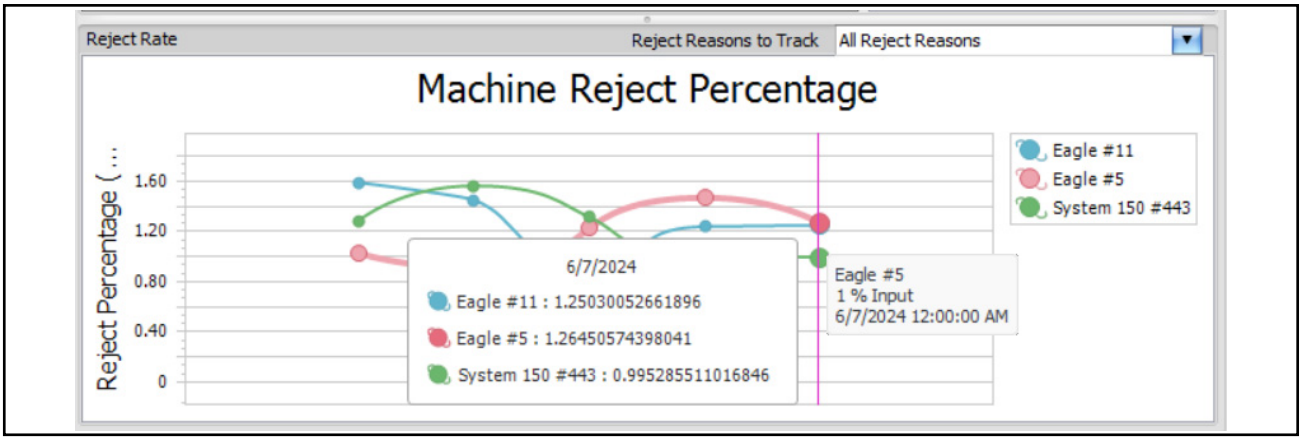


Figure 4-92: Reject Rate

4.7.5.3. Reject Report - Example 1

Figure 4-93 is an example of a **Total** report that shows the Reject Count for all scanners, a System 150, and two Eagles during a one week work period.

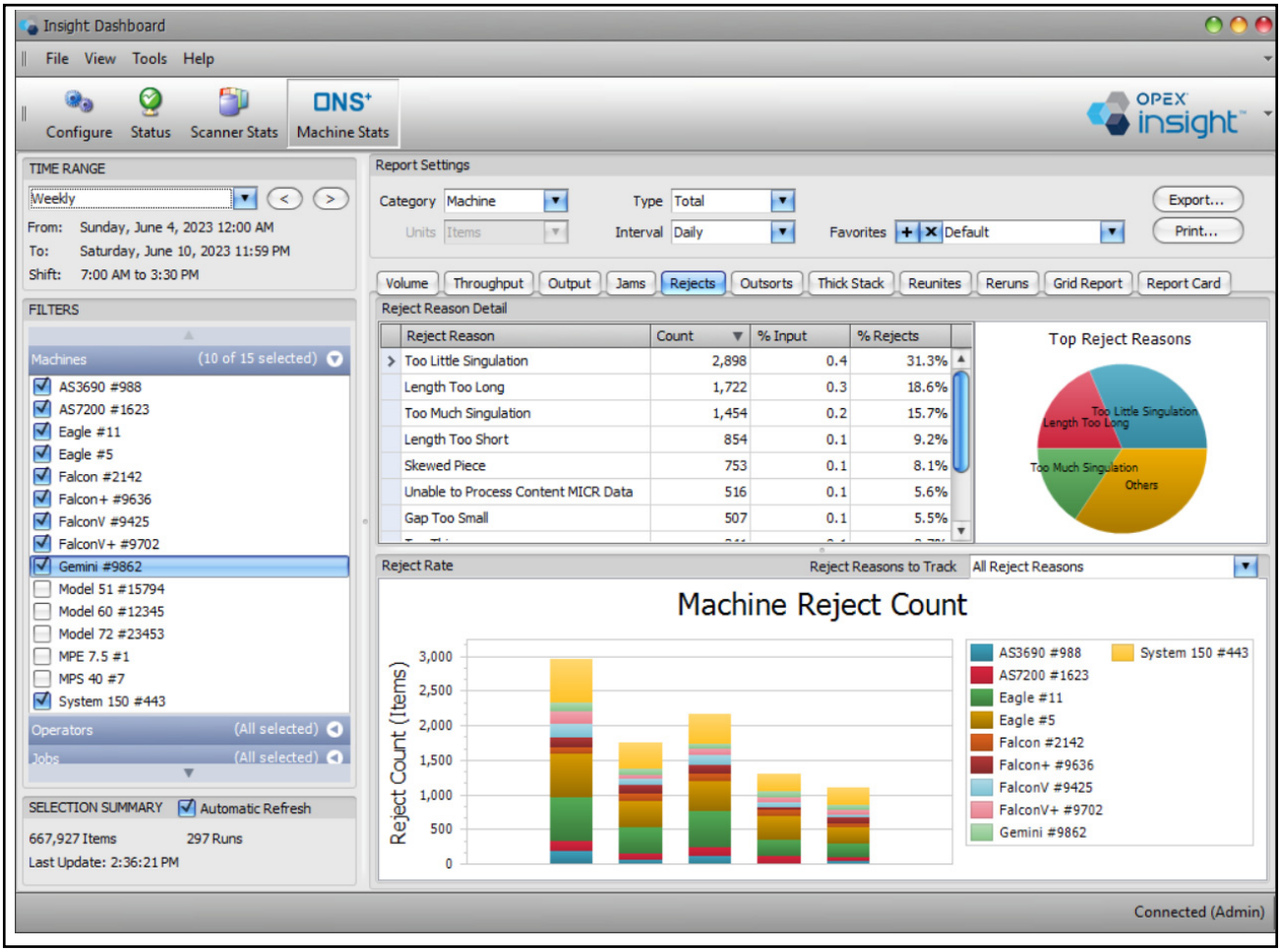


Figure 4-93: Machine Reject Count

4.7.6. Outsorts Report

The ONS+ Machine Stats Outsort Report provides a count of Outsort items processed on high-speed Capital Equipment, such as an Eagle. It includes the following display areas (Figure 4-94):

1. **Outsort Reason Detail**
2. **Top Outsort Reasons** pie chart
3. **Outsort Rate**

In Figure 4-94 is an example of an Outsorts Report for **Type** set to `Total` for a System 150 and two Eagles during a one week work period.

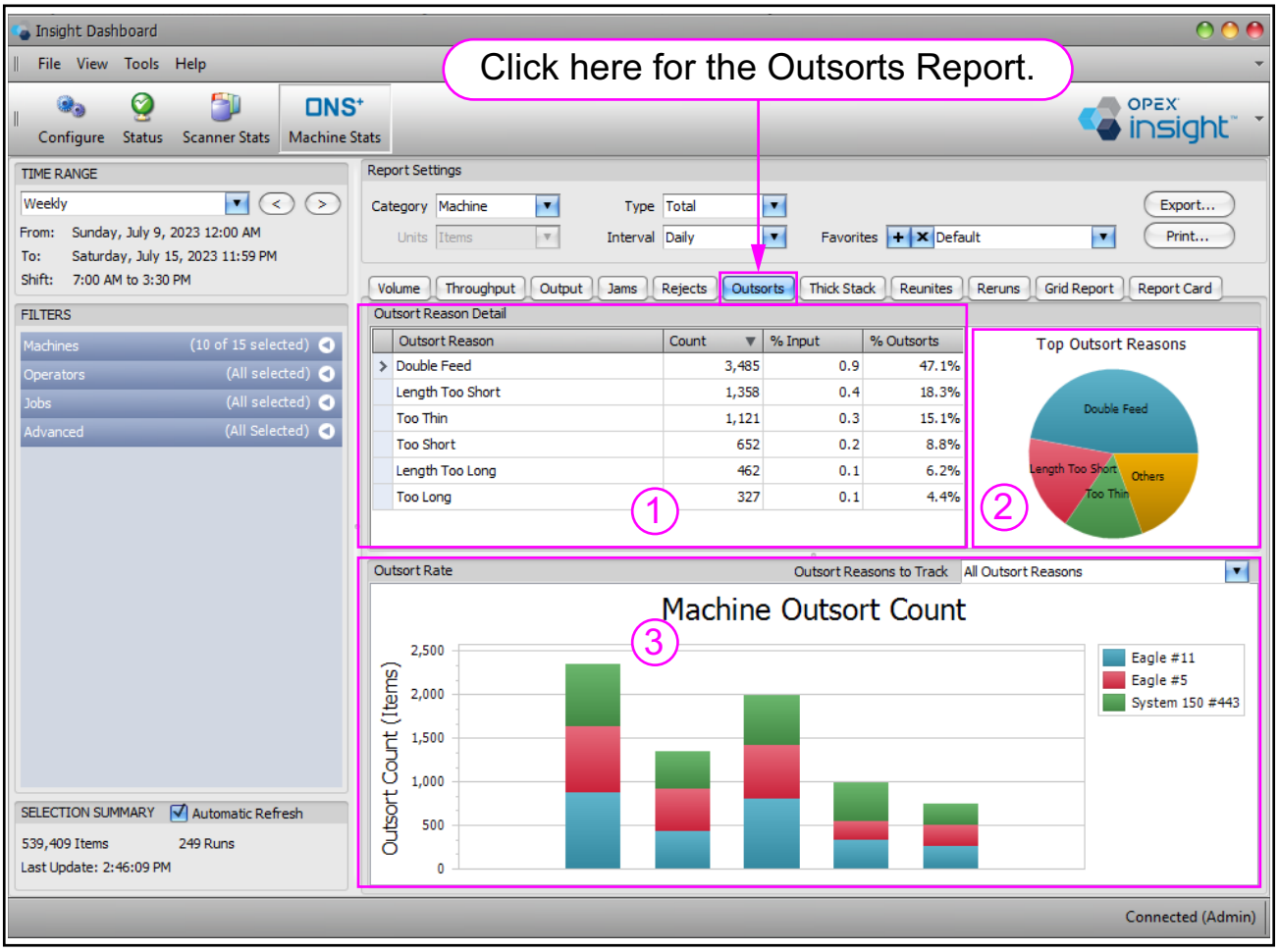
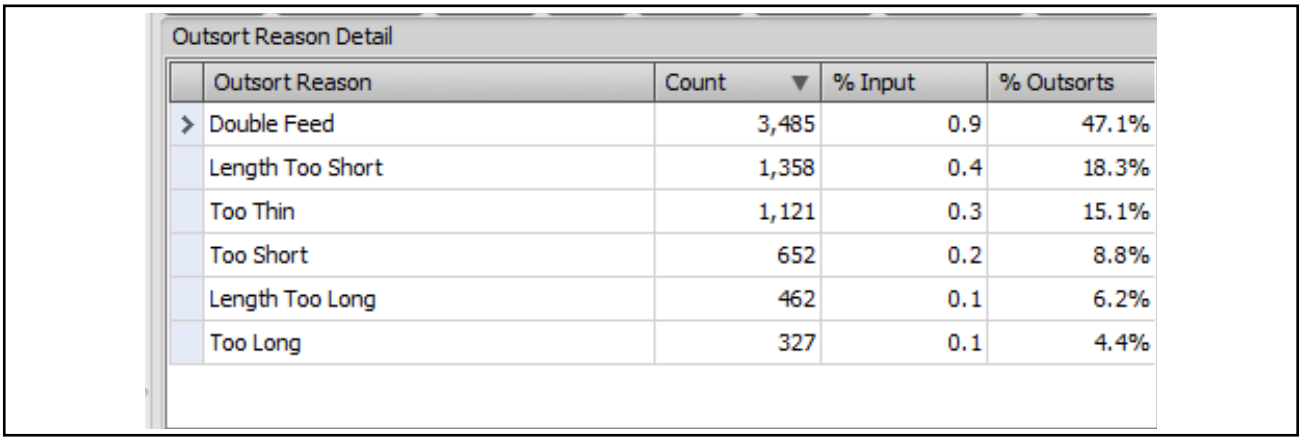


Figure 4-94: Outsorts Report

4.7.6.1. Outsort Reason Detail

The **Outsort Reason Detail** provides (Figure 4-95):

- **OutSort Reason**
- **Count**
- **%Input**
- **%Outsorts**



Outsort Reason Detail

Outsort Reason	Count	% Input	% Outsorts
Double Feed	3,485	0.9	47.1%
Length Too Short	1,358	0.4	18.3%
Too Thin	1,121	0.3	15.1%
Too Short	652	0.2	8.8%
Length Too Long	462	0.1	6.2%
Too Long	327	0.1	4.4%

Figure 4-95: Outsort Reason Detail

4.7.6.2. Outsort Rate

The **Outsort Rate** is the graphical representation of outsort count, based on **Filter** and **Report Settings**. It includes a selectable drop-down list of outsort reasons to track (Figure 4-96).

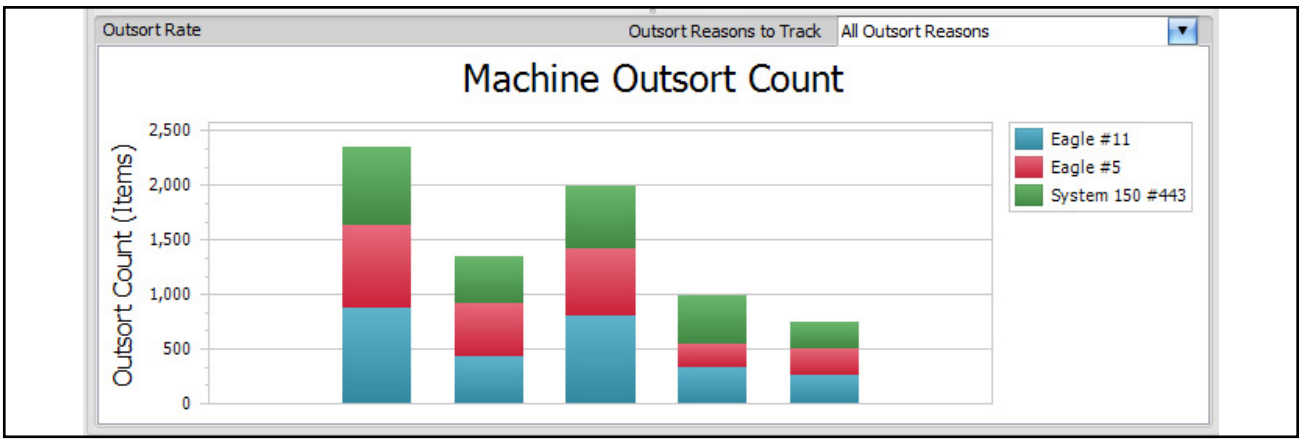


Figure 4-96: Outsort Rate

4.7.7. Thick Stack Report

ONS+ Machine Stats Thick Stack Report provides a Thick Stack Count for items processed on MPE 7.5 Equipment. It includes the following display areas (Figure 4-97):

1. **Thick Stack Reason Detail**
2. **Top Thick Stack Reasons** pie chart
3. **Thick Stack Rate**

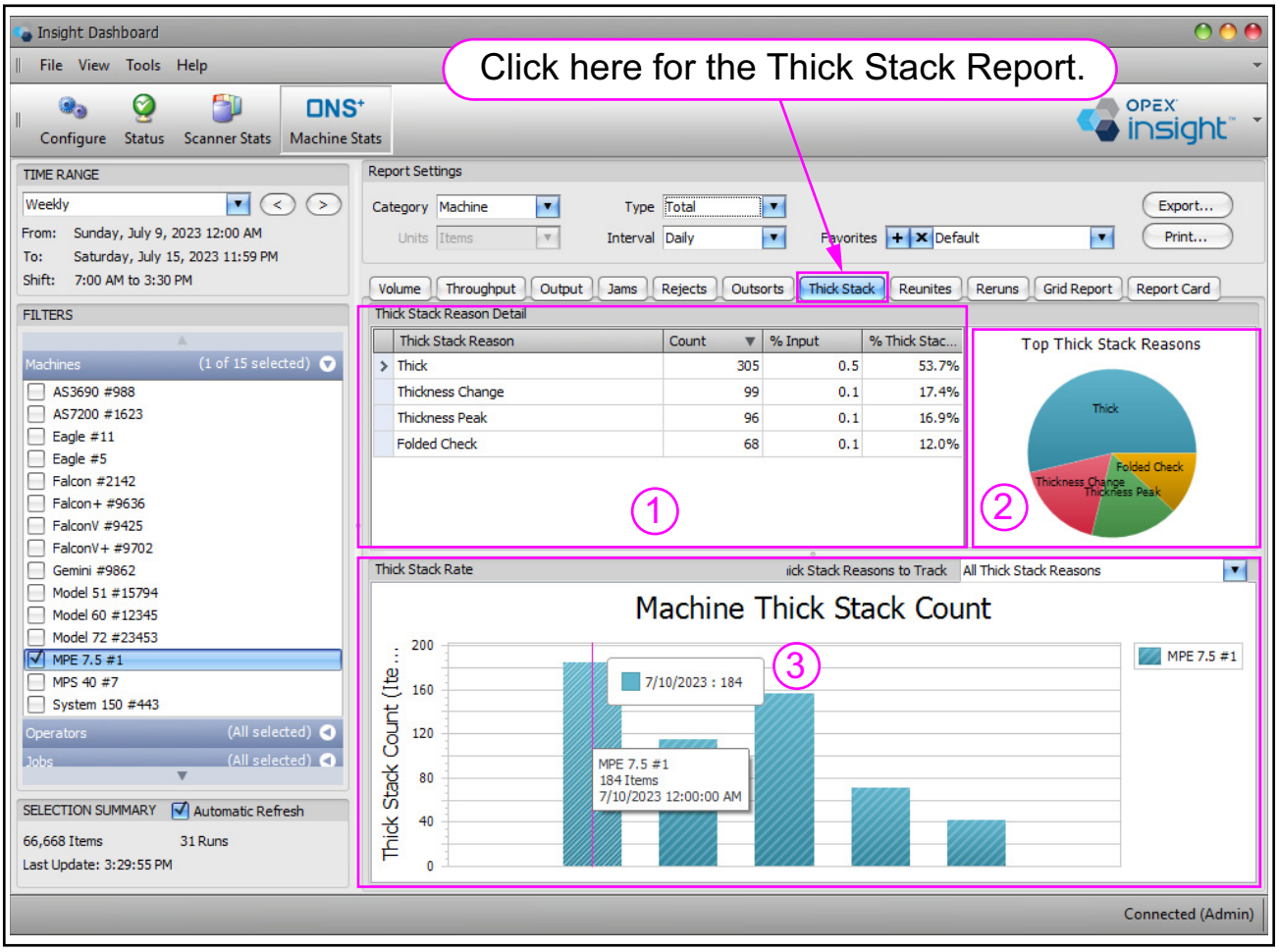


Figure 4-97: Thick Stack Report

4.7.7.1. Thick Stack Reason Detail

The **Thick Stack Reason Detail** provides (Figure 4-98):

- **Thick Stack Reason**
- **Count**
- **% Input**
- **% Thick Stack** for the selected criteria.

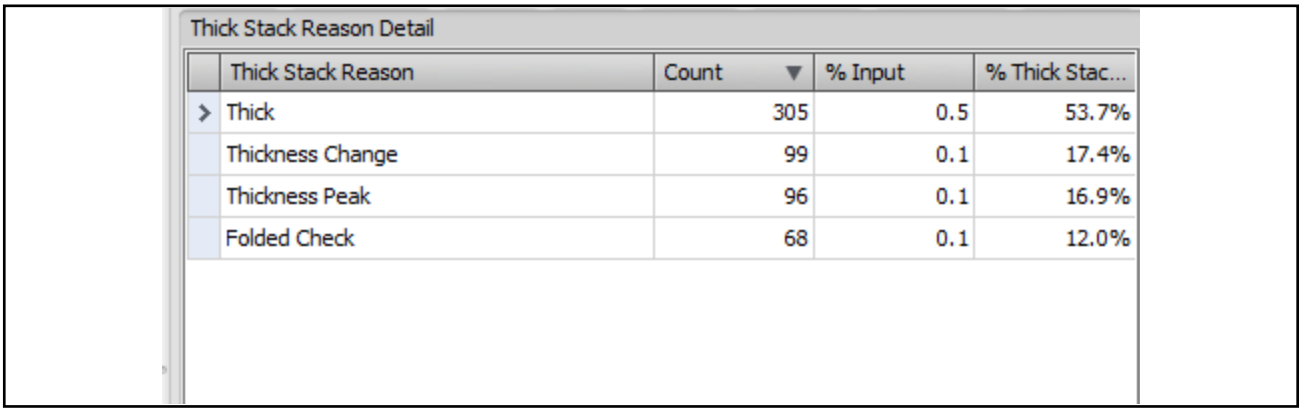


Figure 4-98: Thick Stack Reason Detail

4.7.7.2. Thick Stack Rate

The **Thick Stack Rate** is a graphical representation of thick stack count, based on **Filter** and **Report Settings**. It includes a selectable drop-down list of thick stack reasons to track (Figure 4-99).

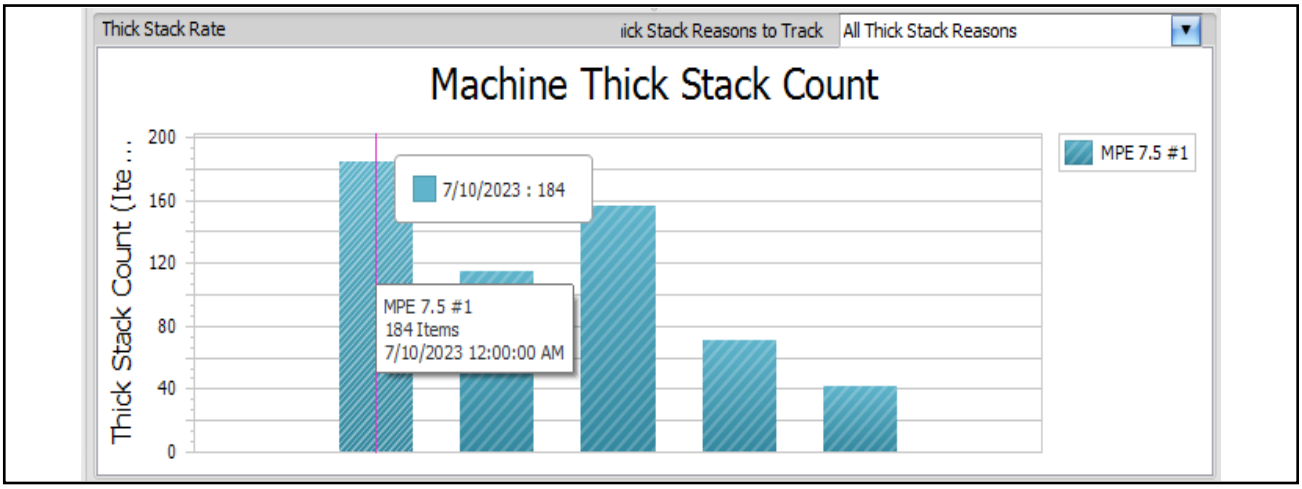


Figure 4-99: Thick Stack Rate

4.7.8. Reunites Report

The ONS+ Machine Stats Reunites Report provides a count of reunited items (envelopes and their contents) processed on high-speed Capital Equipment, such as an Eagle. It includes the following display areas (Figure 4-100):

1. **Reunite Reason Detail**
2. **Top Reunite Reasons** pie chart
3. **Reunite Rate**

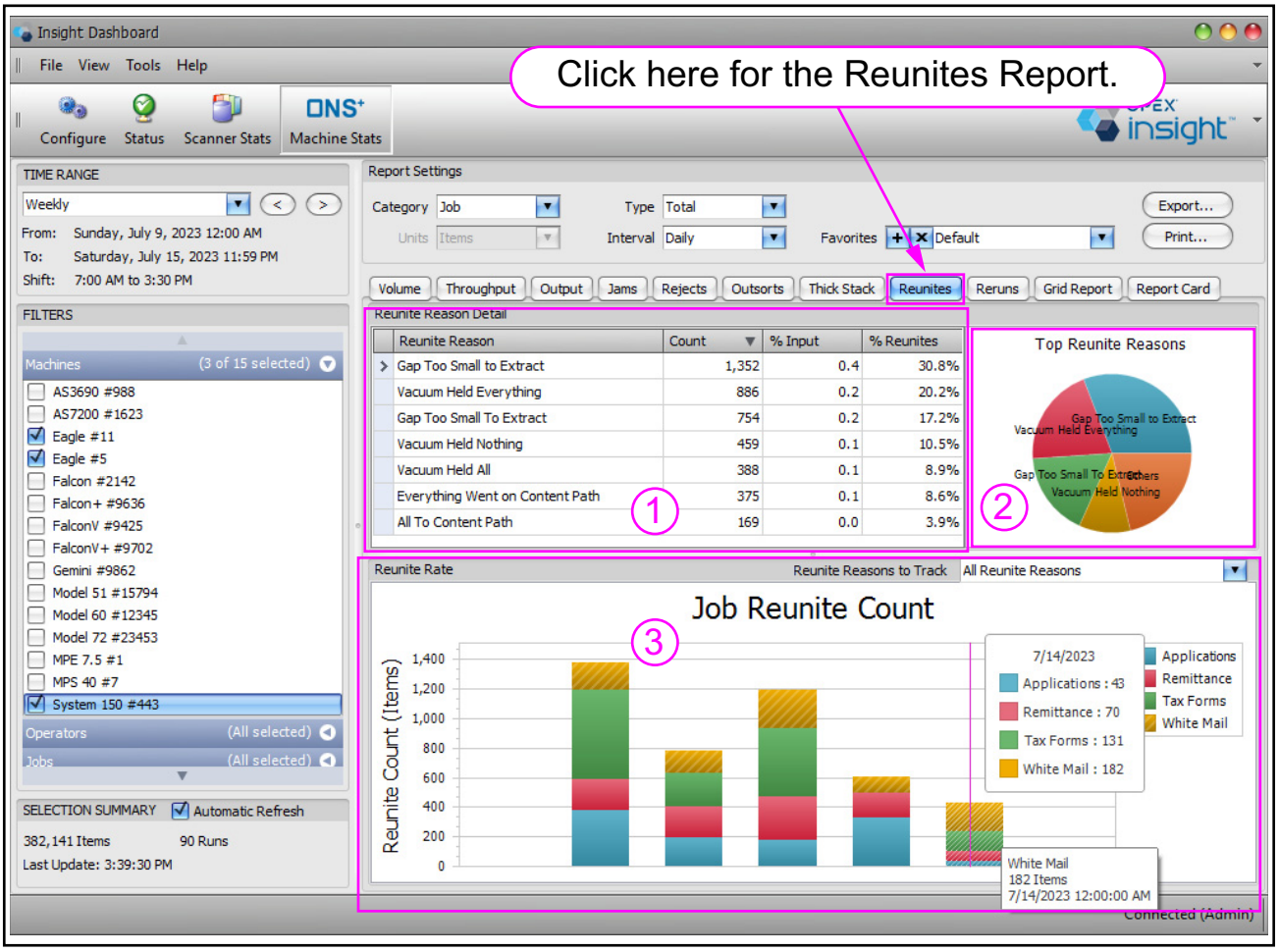
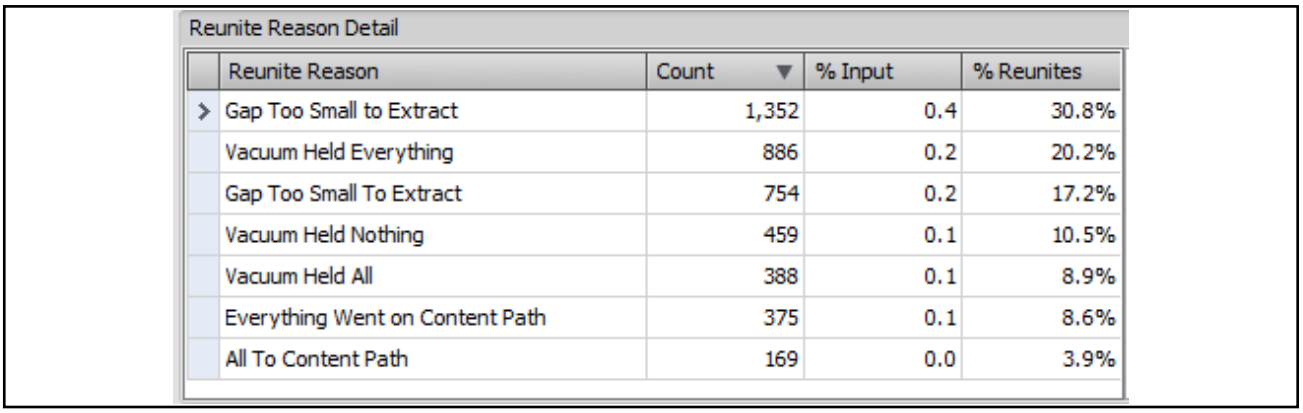


Figure 4-100: Reunites Report

4.7.8.1. Reunite Reason Detail

The **Reunite Reason Detail** provides (Figure 4-101):

- **Reunite Reason**
- **Count**
- **% Input**
- **% Reunites**



Reunite Reason Detail

Reunite Reason	Count	% Input	% Reunites
Gap Too Small to Extract	1,352	0.4	30.8%
Vacuum Held Everything	886	0.2	20.2%
Gap Too Small To Extract	754	0.2	17.2%
Vacuum Held Nothing	459	0.1	10.5%
Vacuum Held All	388	0.1	8.9%
Everything Went on Content Path	375	0.1	8.6%
All To Content Path	169	0.0	3.9%

Figure 4-101: Reunite Reason Detail

4.7.8.2. Reunite Rate

Reunite Rate displays a graphical view of Reunite Counts, based on **Filter** and **Report Settings**. It includes a selectable drop-down list of reunite reasons to track (Figure 4-102).

Figure 4-102: Reunite Rate

4.7.9. Reruns Report

The ONS+ Machine Stats Reruns Report provides a Count of Reruns on an MPS 40. It includes the following display areas (Figure 4-103):

1. **Rerun Reason Detail**
2. **Top Rerun Reasons** pie chart
3. **Rerun Rate**

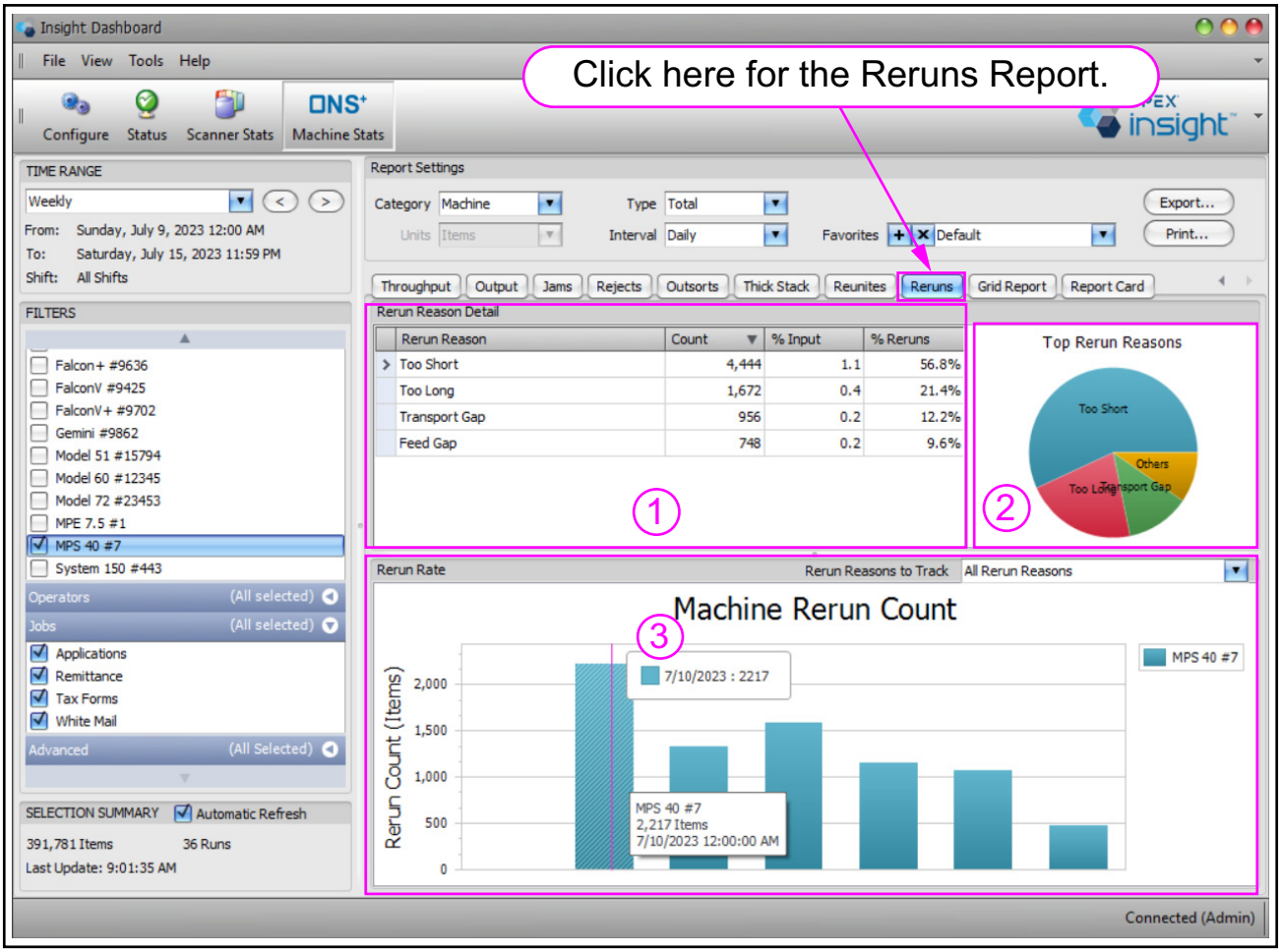


Figure 4-103: Reruns Report

4.7.9.1. Rerun Reason Detail

The **Rerun Reason Detail** provides (See Figure 4-104):

- **Rerun Reason**
- **Count**
- **% Input**
- **% Reruns**

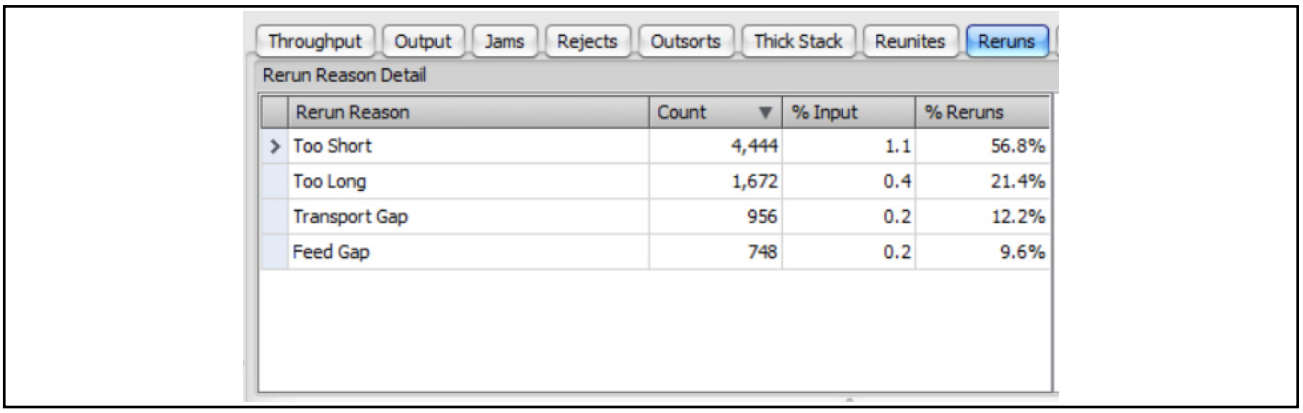


Figure 4-104: Rerun Reason Detail

4.7.9.2. Rerun Rate

The Rerun Rate provides a graphical view of the Rerun Count or Percentage depending on **Filter** and **Report Settings**. It includes a selectable drop-down list of rerun reasons to track (Figure 4-105).

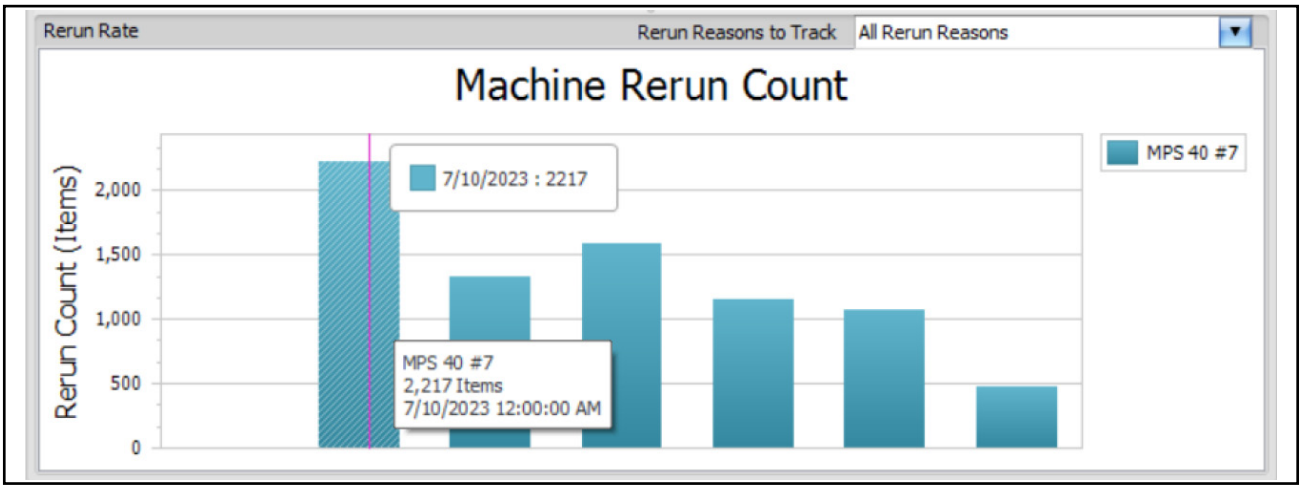


Figure 4-105: Rerun Rate

4.7.10. Grid Report

The Machine Stats module Grid Report provides input, throughput, wall clock rate, run time, jam time, idle time, jam count and output statistics in a tabular format (Figure 4-106).

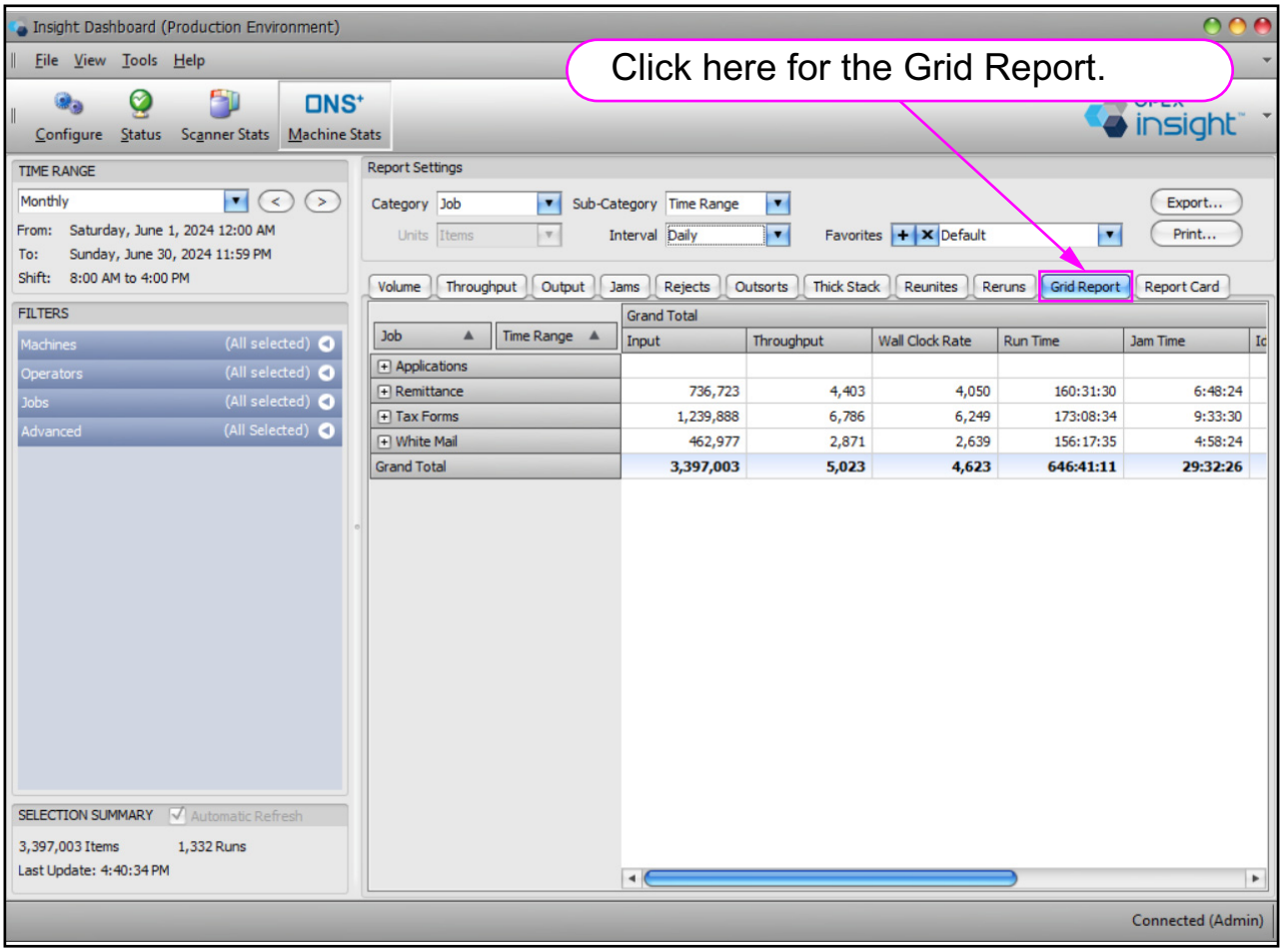


Figure 4-106: Grid Report

1. Click the **`Grid Report`** tab to access the Machine Stats Grid Report.
2. Set the **TIME RANGE** and **Filters**.
3. Set the specific **Report Settings** for the grid report:
   a. The **Category** drop-down determines the contents of column 1 in the grid. It can be set to **`Operator`**, **`Machine`**, **`Job`**, or **`Individual Run`**.
   b. The **Sub-Category** determines the contents of column 2 in the grid. Its selection values are influenced by the **Category** setting (Figure 4-107 and Table 4-16).

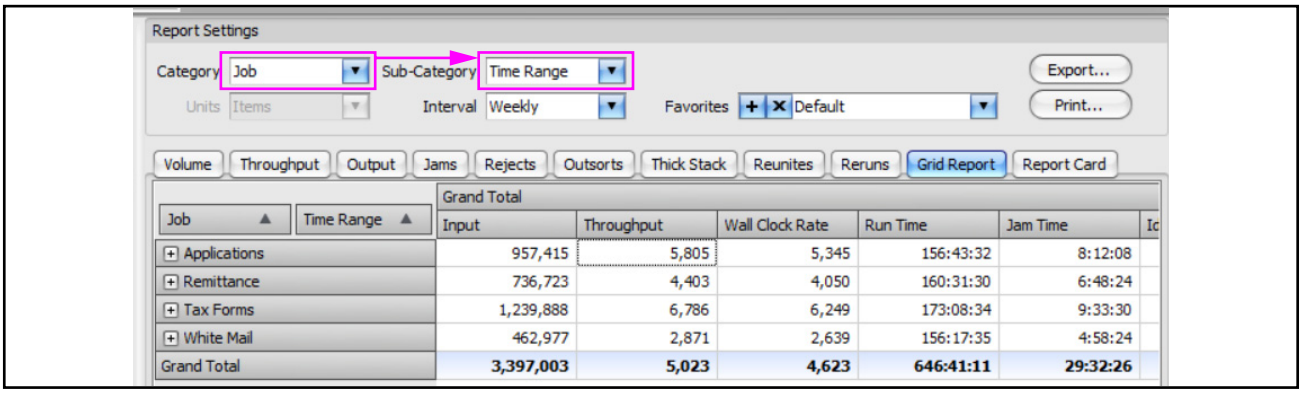


Figure 4-107: Category and Sub-Category

Table 4-16: Sub-Category Choices Based on the Category Setting

Category	Sub-Category
Operator	• Machine • Job • Time Range
Machine	• Operator • Job • Time Range
Job	• Operator • Machine • Time Range
Individual Run	• Comparison • Total

c. The **Interval** drop-down will only be available when the **Sub-Category** is set to `Time Range`. It will effect the display of the **Sub-Category** when the **Sub-Category** is expanded (Figure 4-108).

Note: *The available interval settings depend on the* **TIME RANGE** *setting, as usual. So,* **TIME RANGE** *influences* **Interval** *which influences the* **Sub-Category** *dates that are displayed (*Figure 4-108*).*

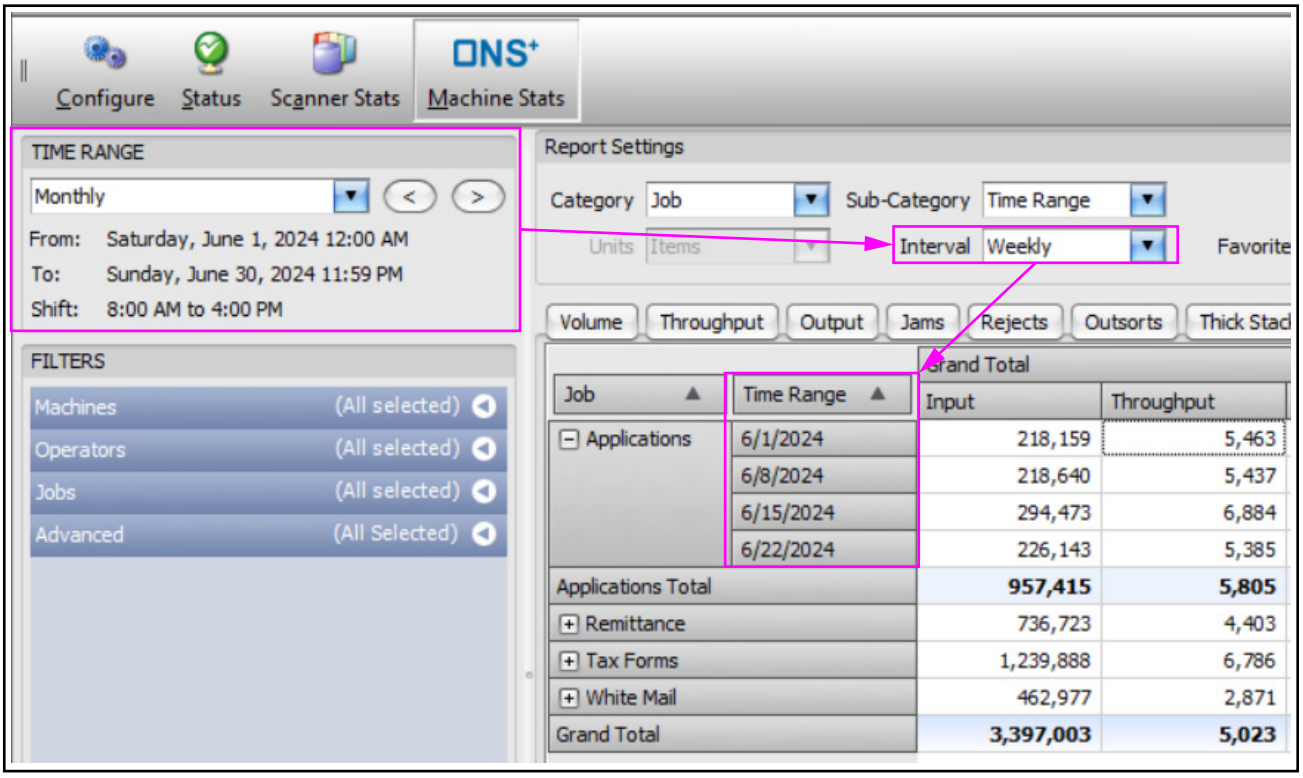


Figure 4-108: Effect of TIME RANGE and Interval on Sub-Category

4.7.10.1. Grid Report - Example 1

1. Set **Category** equal to `Individual Run`.
2. Set **Type** setting equal to `Total`.

The result is the **Individual Run** report in the form of a grid with ten columns of information (Figure 4-109). For the specified time period, among the information included in the grid are:

- **Jobs** run during this period.
- **Operators** who ran the Jobs.
- **Input** in numbers of items.
- **Throughput** in items per hour.
- **Wall Clock Rate** in items per hour.
- **Run Time** that the operators spent on the Jobs.
- **Jam Time**.

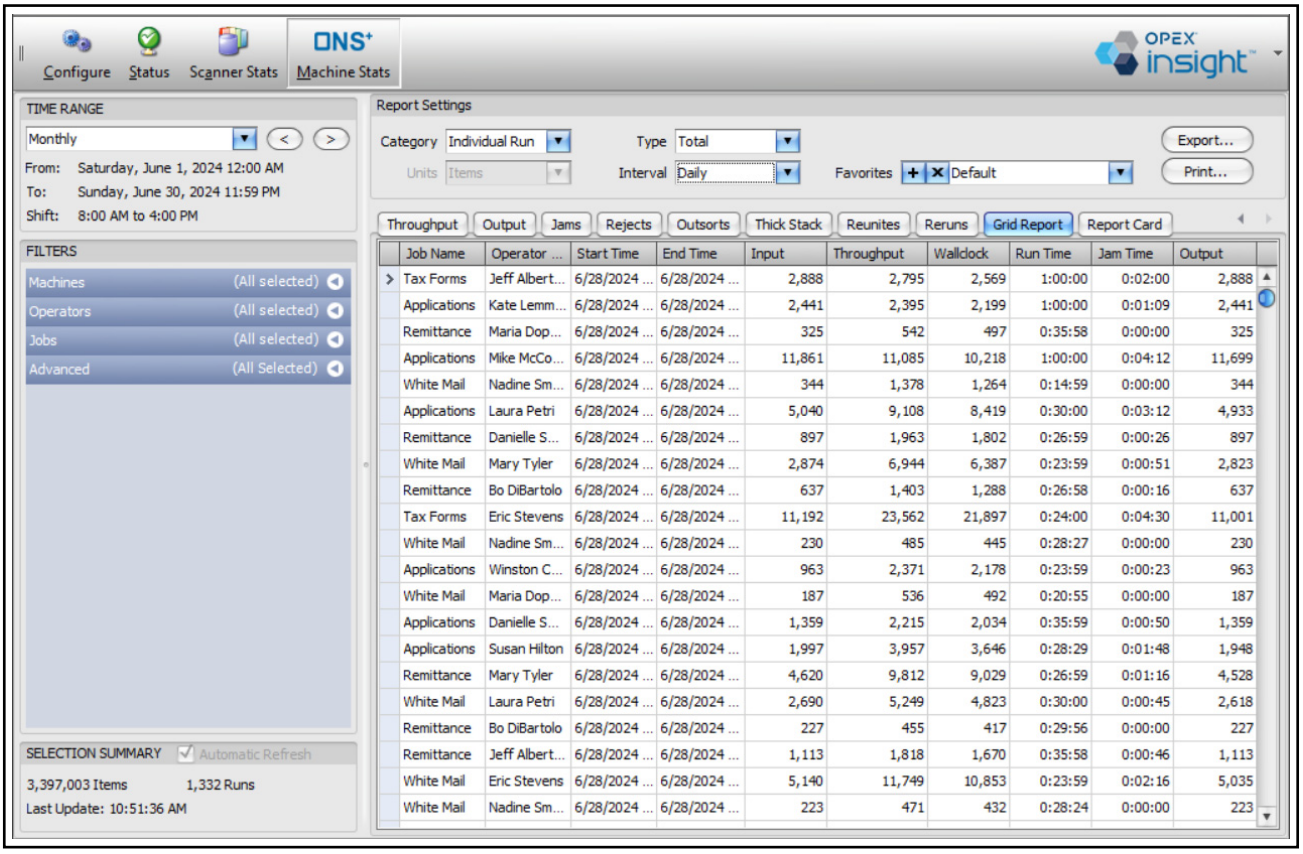


Figure 4-109: Grid Report - Example one

4.7.11. Report Card

The ONS+ Machine Stats module has a Report Card feature that is similar to that in the Scanner Stats module, including the same toolbar (Figure 4-110).

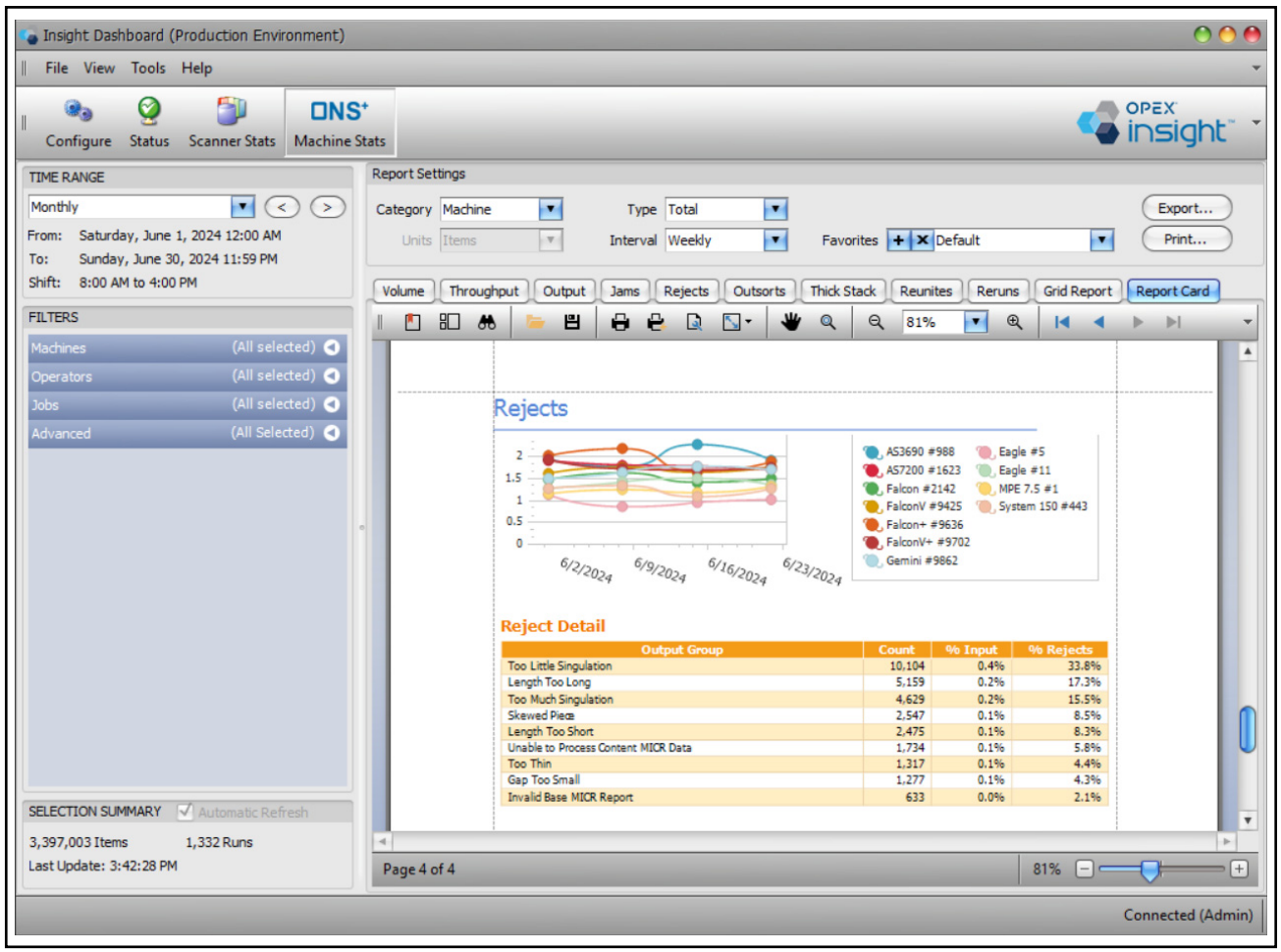


Figure 4-110: Report Card

Note: *Machine stats are derived from the OPEX equipment files themselves. The Report Card for machine stats is the same as the report directly from the machine. Report cards also exist for the scanner stats, but these will not match the machine, since they are derived from data contained in batch files.*

To create a report card:

1. Click the **ONS+ Machine Stats** button.
2. Set the **TIME RANGE** and **Filters**.
3. Click the **Report Card** button. The report card appears (Figure 4-111).
4. Use the scroll bar to scroll through the pages of the report.

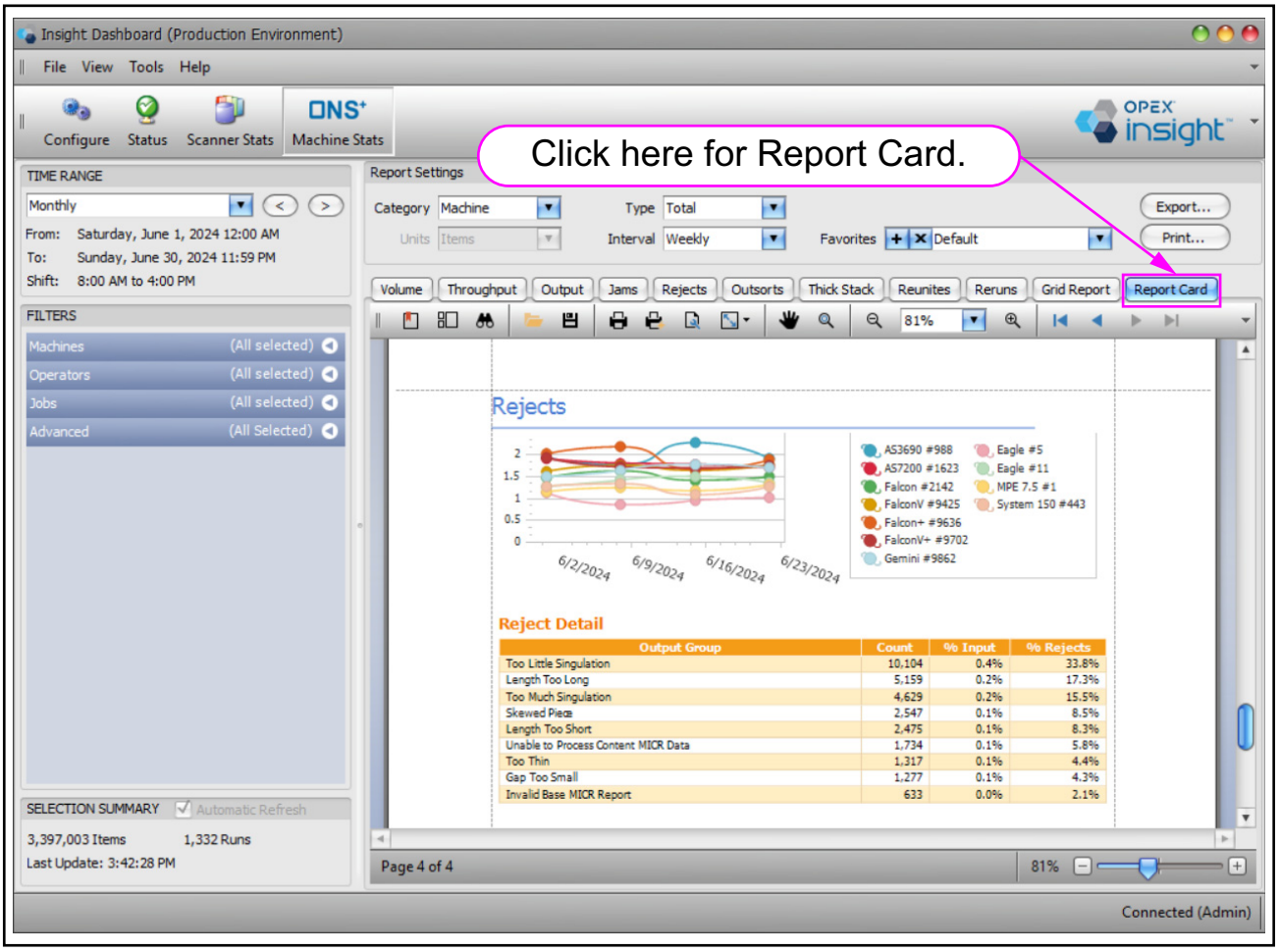


Figure 4-111: Report Card

4.8. Exporting, Printing, and Emailing a Report

Several options are available for exporting, printing, or emailing reports.

4.8.1. Exporting a Report Using the Export Button

1. Click the **Export** button. A **Save As** window opens (Figure 4-112).
2. Select the location to save the file.
3. Enter a File name.
4. Use the **Save As type** drop-down to select the file format as either **CSV** or **XML**.
5. Click the **Save** button.

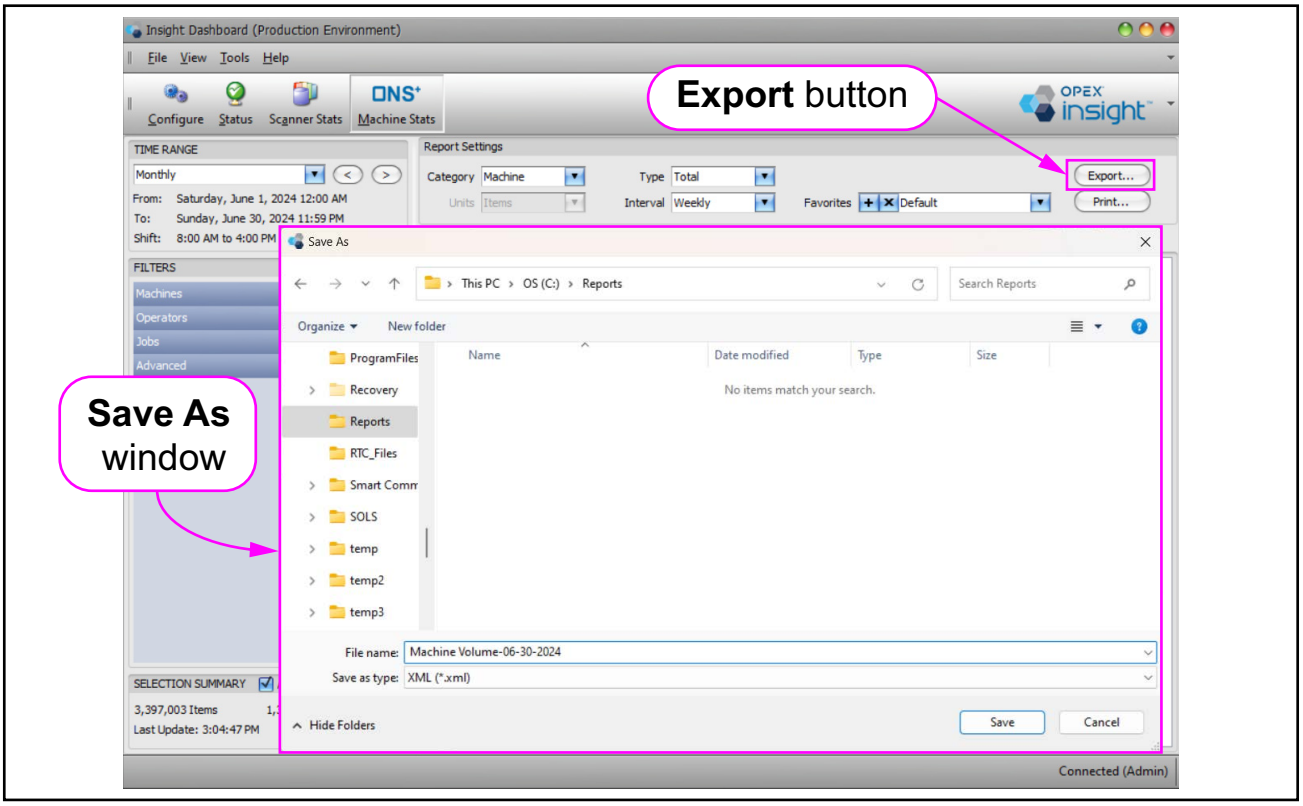


Figure 4-112: Save As window

4.8.2. Print a Report from the Print Button

1. Click on the **Print** button (Figure 4-113). The print **Preview** window is displayed (Figure 4-114). The print **Preview** window has the following:
   - It has a menu.
   - It has a toolbar that is identical to that of the **Report Card** toolbar, except that it also has a **Close Preview** button.

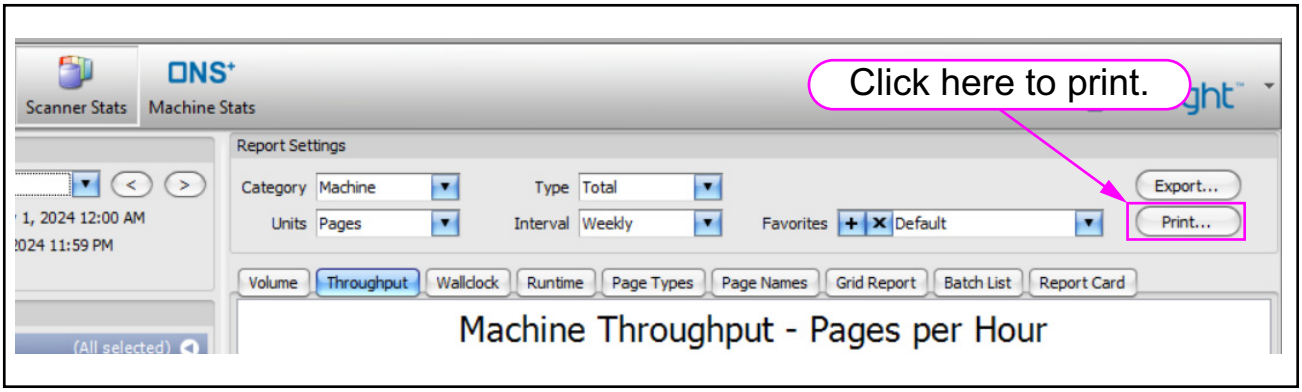


Figure 4-113: Print button

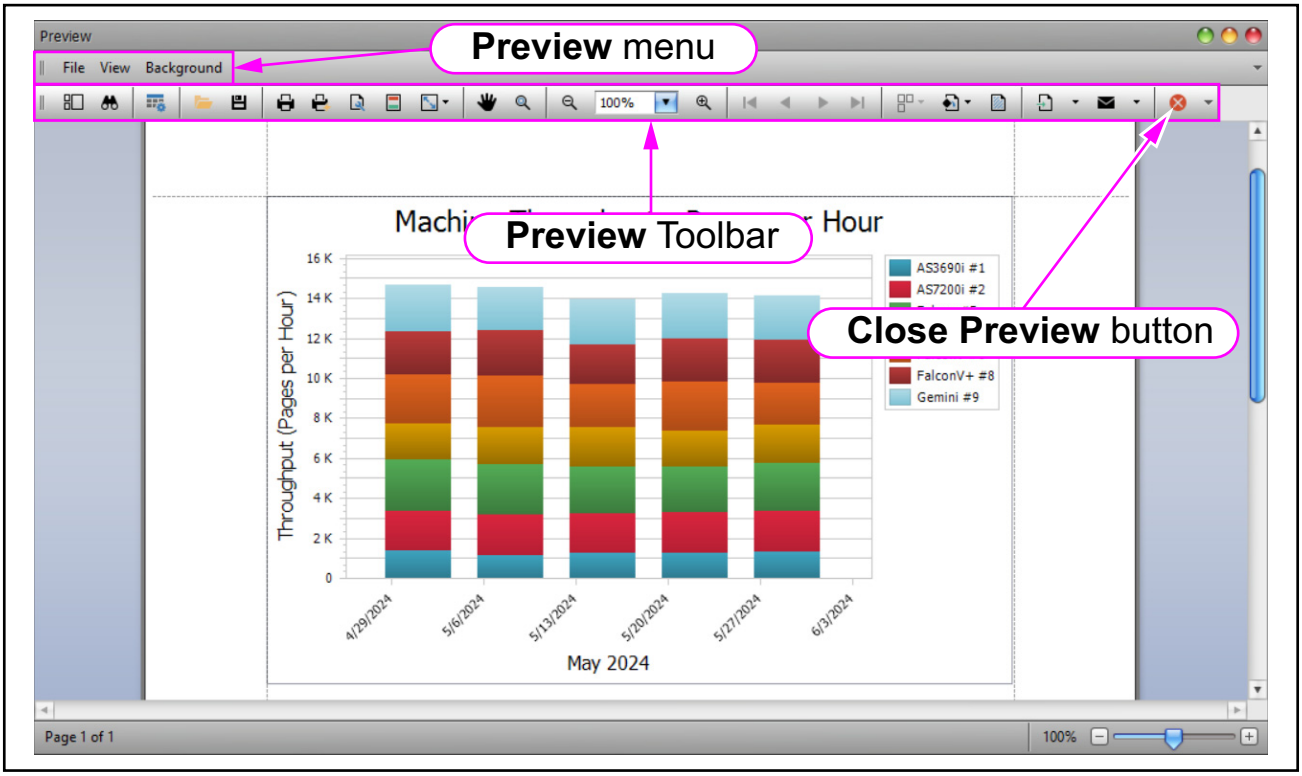


Figure 4-114: Print Preview Window

2. Click on **File**. The **File** menu items are displayed (Figure 4-115).

Note: *Everything that you can perform on the* **File** *menu items you can also perform on the buttons on the* **Preview** *toolbar.*

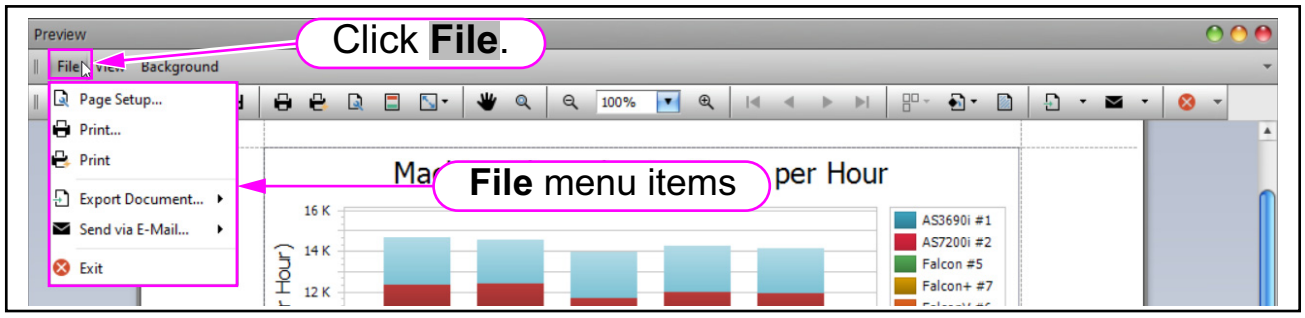


Figure 4-115: Clicking on File

3. Click on **Page Setup** to setup the page for printing (Figure 4-116). The Page Setup window opens.
4. Set up the page and click **OK**.

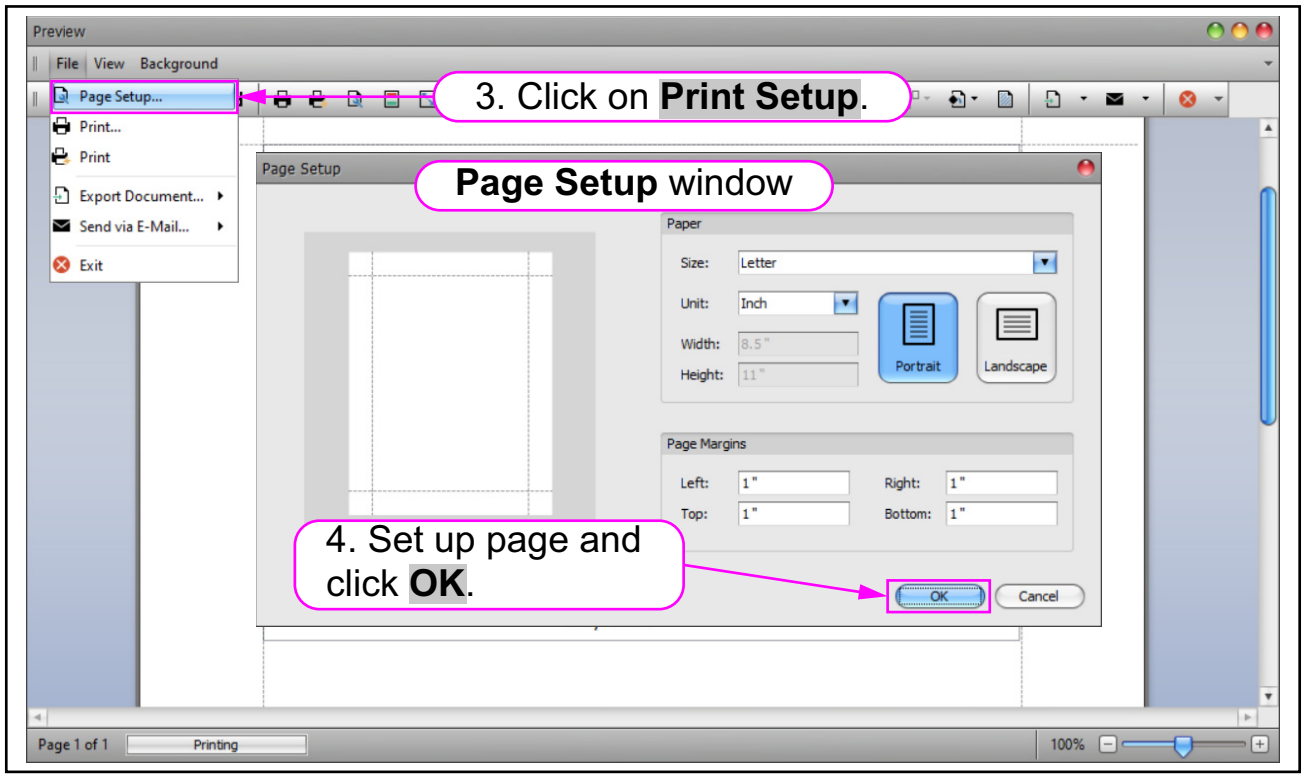


Figure 4-116: Page Setup

5. Click on `File` > `Print`. The **Print** settings window opens (Figure 4-117).

6. Adjust printer settings and click `Print`.

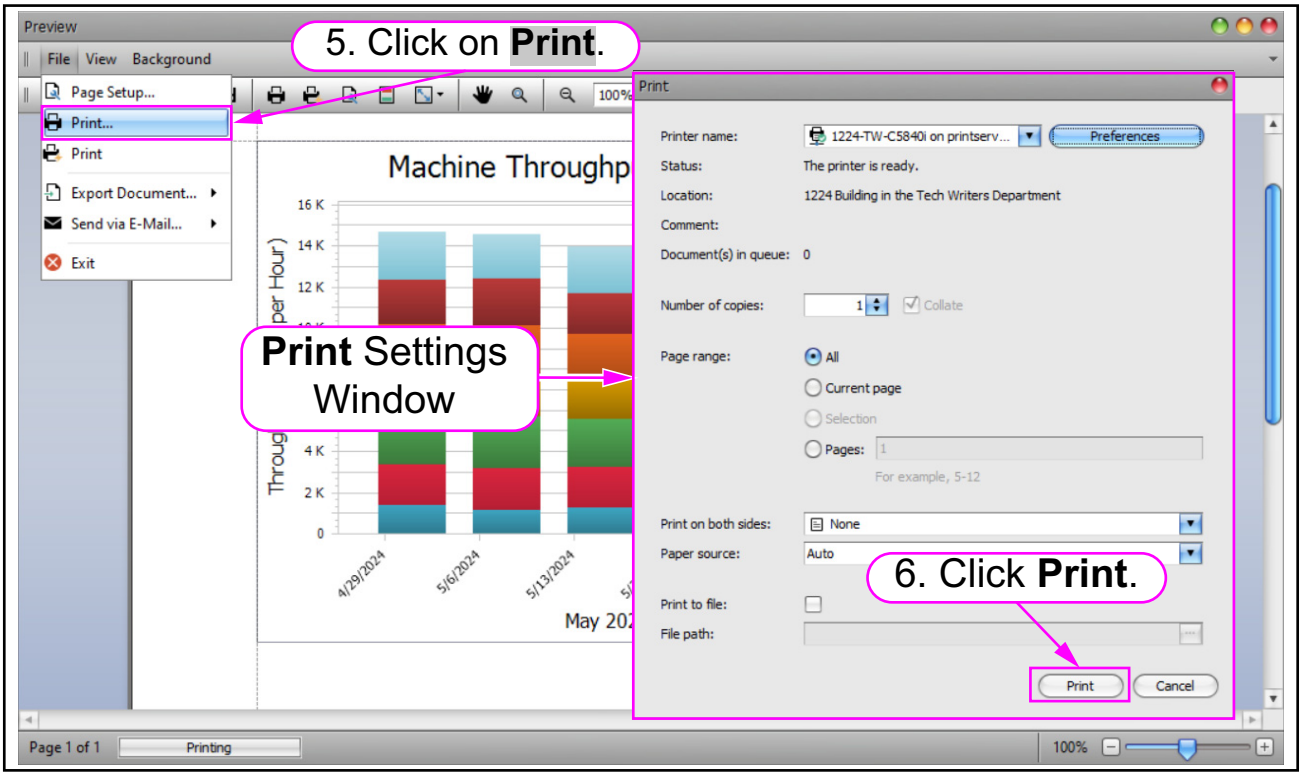


Figure 4-117: Print the report

Note: *You have the option of clicking on the* `Quick Print` *button to print using previously set printer settings (Figure 4-118).*

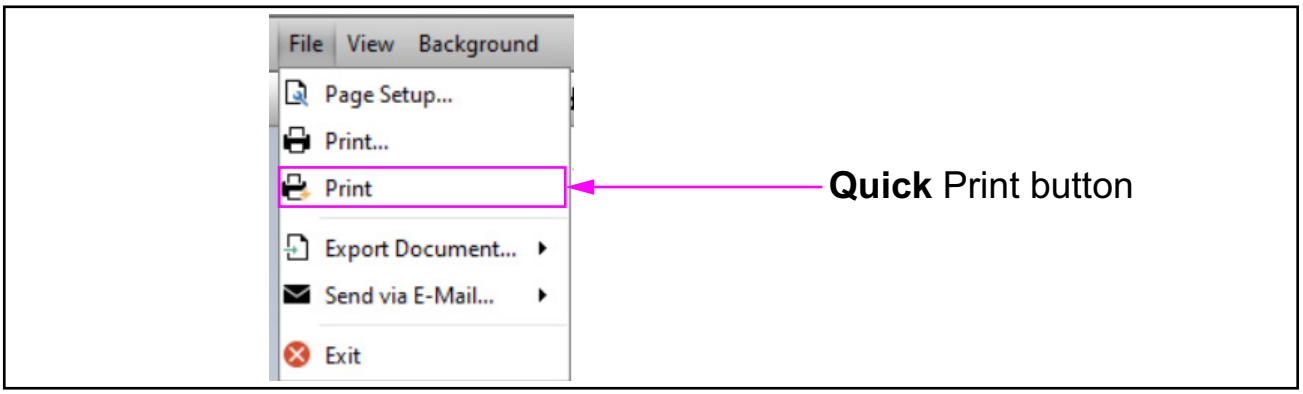


Figure 4-118: Quick Print button

4.8.2.1. Optional Print Preview Menu Items

The print **Preview** menu has the following optional menu items:

- **View** allows you to customize the arrangement of the print **Preview** window (Figure 4-119).

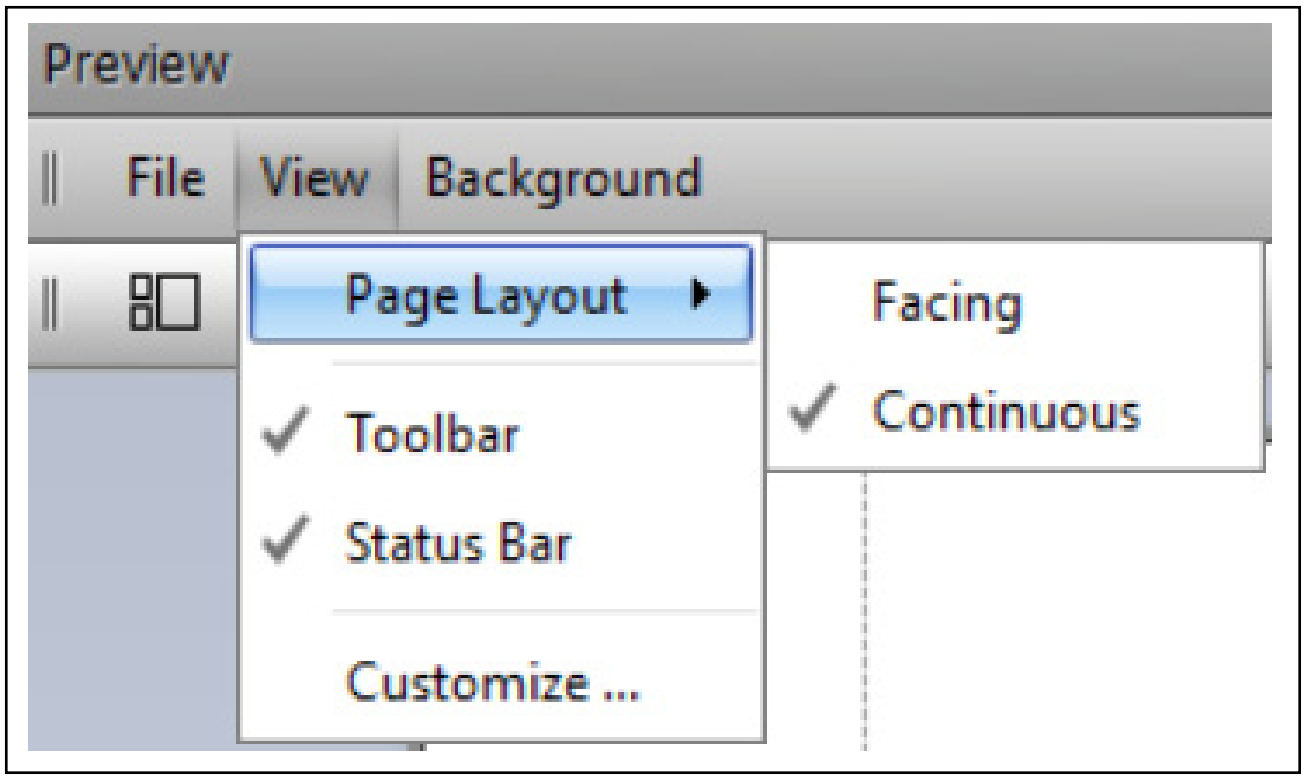


Figure 4-119: View

- **Background** allows you to:
  - Customize the background color of the printed report.
  - Add a watermark to the printed report.

1. Click **`Background > Color`**. A window opens, allowing you to change the background color (Figure 4-120).

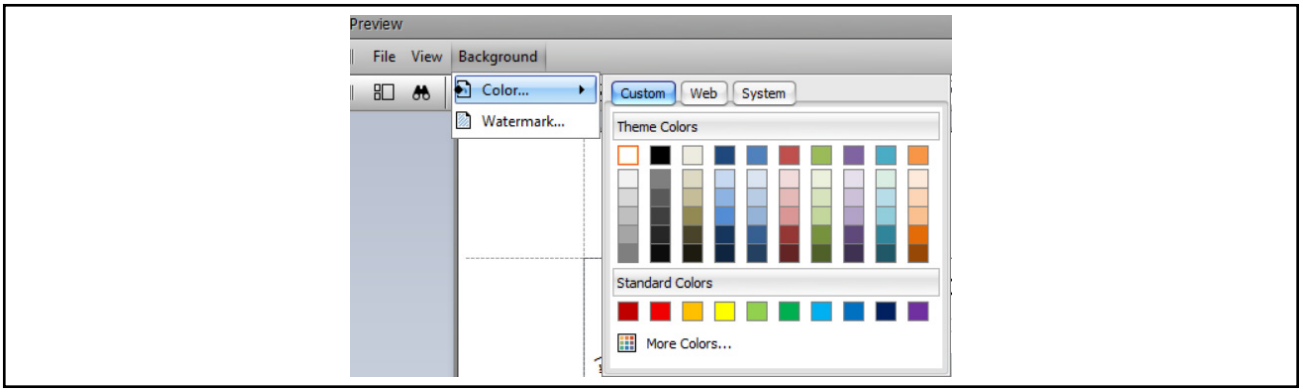


Figure 4-120: Changing the background color

2. Click **`Background > Watermark`**. A window opens, allowing you to create a customized watermark (Figure 4-121).

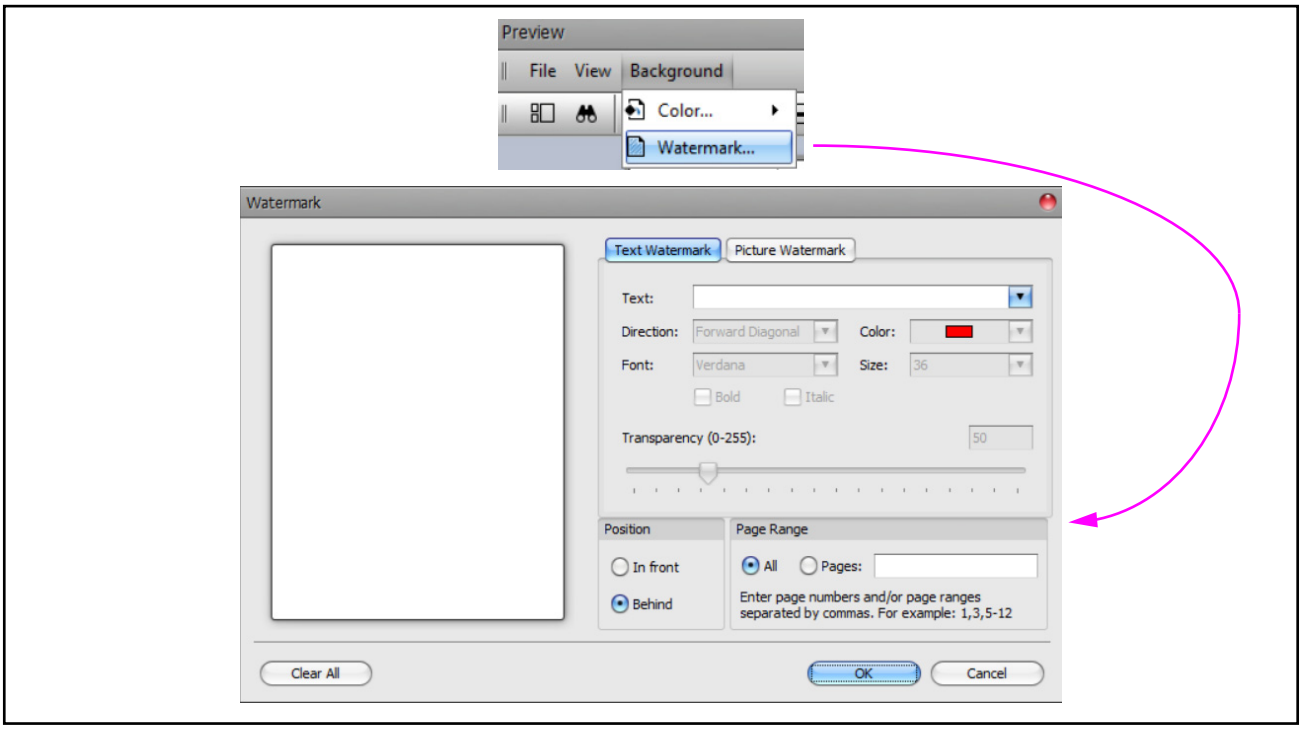


Figure 4-121: Adding a watermark

4.8.3. Exporting a Report Using the Print Button

1. Click the **Print** button (Figure 4-122). A **Print Preview** window opens (Figure 4-123).

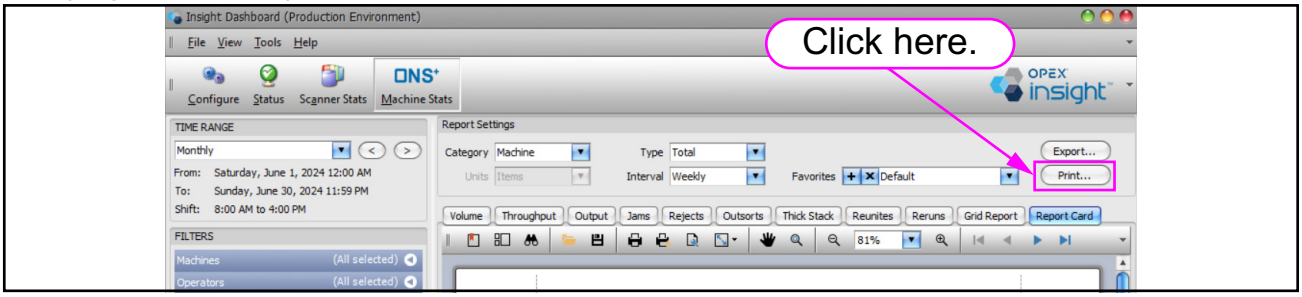


Figure 4-122: Print Button

2. Click on **File** and hover over **Export Document**, or click on the **Export Document** drop-down button in the toolbar. A window appears showing the export file format options (Figure 4-123).

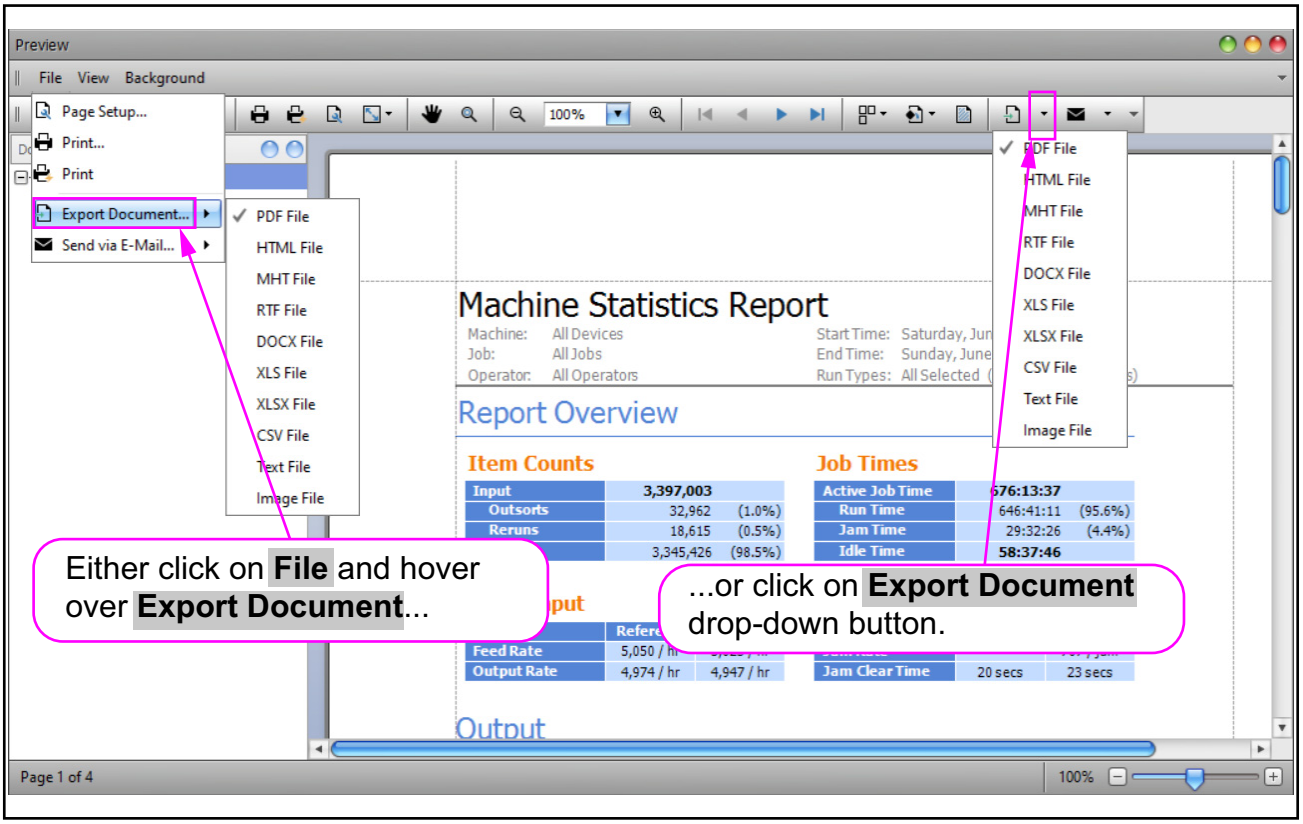


Figure 4-123: Export Document from Print Preview

3. Click on a file format. An **Export Options** window opens.
4. Set the export options and click **OK** (Figure 4-124).

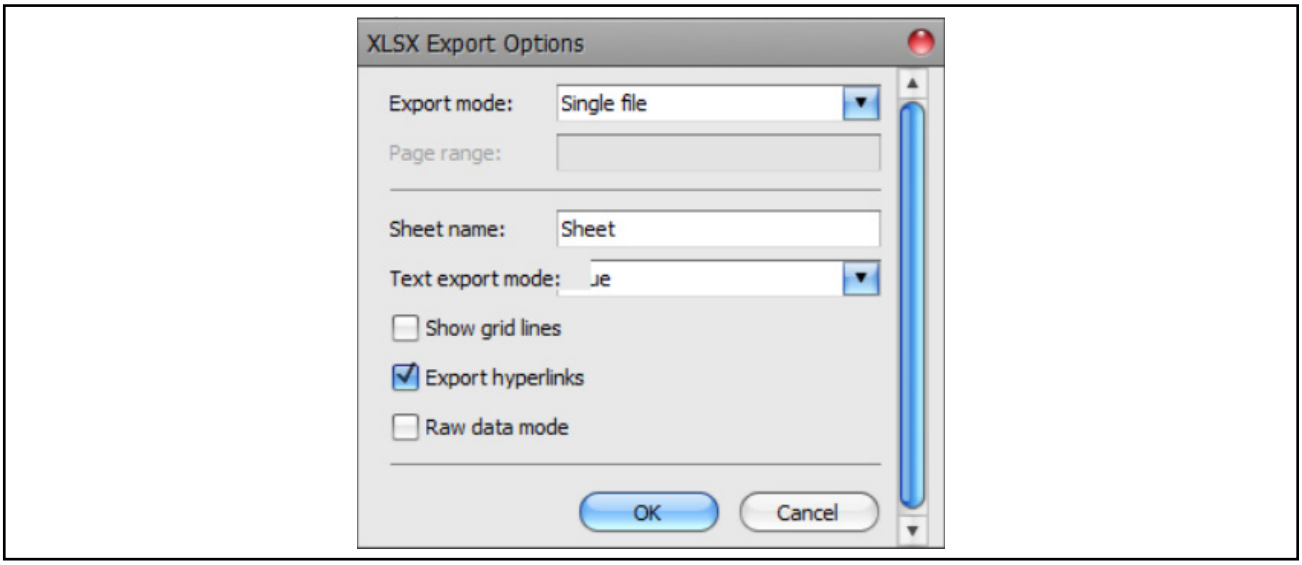


Figure 4-124: Export Options window

5. A **Save As** window opens. Select the location to save the report file.
6. Enter a file name.
7. Click the **Save** button.

4.8.4. Export a Report Using a Recent Format

Use the **Print Preview** window **Export Document** button with similar steps to the **Export Document Drop-Down** button, except that you don't choose the output file format. The output file format will be the last format you chose or a default of PDF format.

1. Click the **Print** button.
2. Click the **Export Document** button (Figure 4-125).

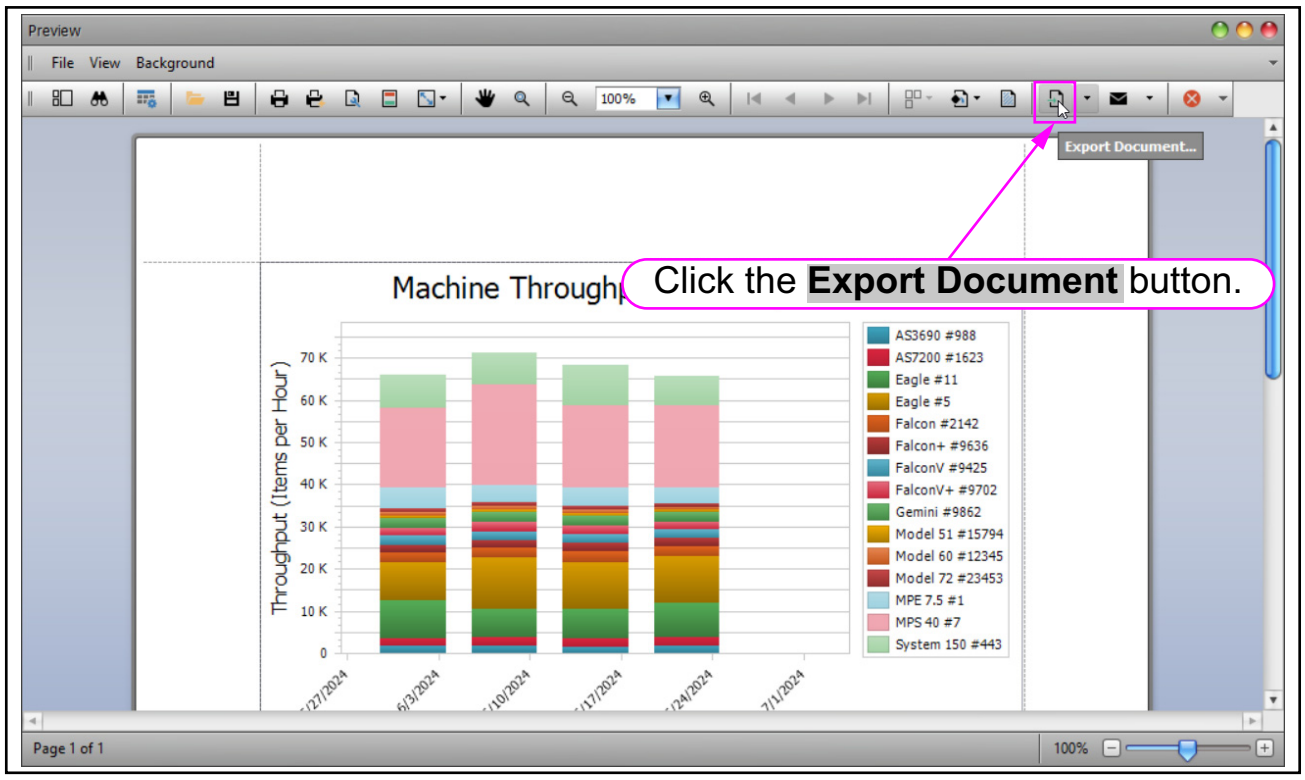


Figure 4-125: Export in recently used format

3. An **Export Options** window opens. Set options for the file.
4. Click the **OK** button in the window.
5. A **Save As** window opens. Select the location to save the file.
6. Enter a file name.
7. Click the **Save** button.

4.8.5. Emailing a Report Using the Print Button

1. Click the **Print** button. The **Print Preview** window opens.
2. Click on **File** and hover over **Send via E-Mail**, or click on the **Send via E-Mail** drop-down button in the toolbar. A window appears showing the export file format options (Figure 4-126).
3. Click on a file format. An **Export Options** window opens.

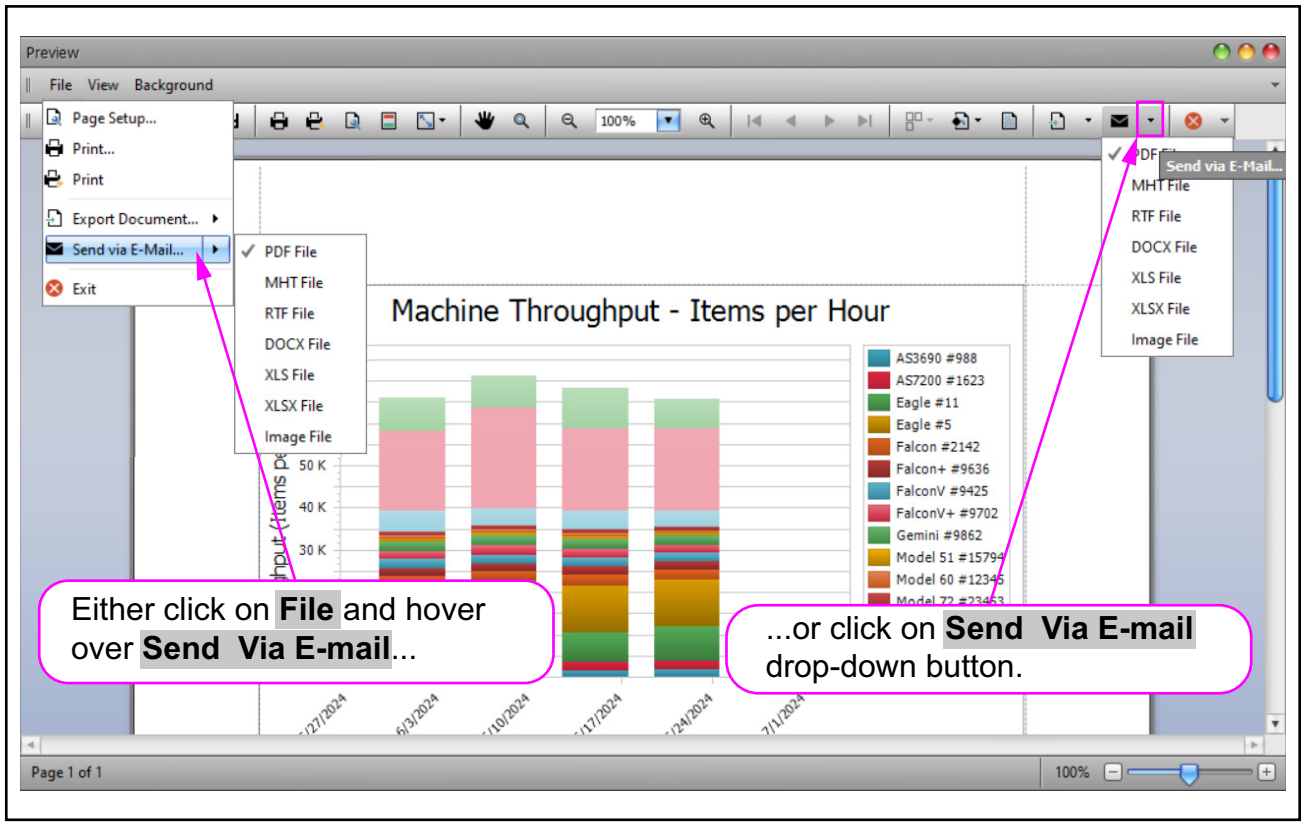


Figure 4-126: File format options

4. Set options for the file format you selected and click the **OK** button.
5. A **Save As** window opens. Select the location to save the report file.
6. Enter a file name.
7. Click the **Save** button.
8. Your email app will open and the saved report will be attached. Send the email with the attachment to the desired recipient.

4.8.6. Emailing a Report Using a Recent Format

1. Click the **Print** button. The **Print Preview** window opens.
2. Click on the **Send via E-Mail** button in the toolbar. An **Export Options** window opens, based on the last format that was emailed or the default format (PDF) (Figure 4-127).
3. Set options for the file format and click the **OK** button.

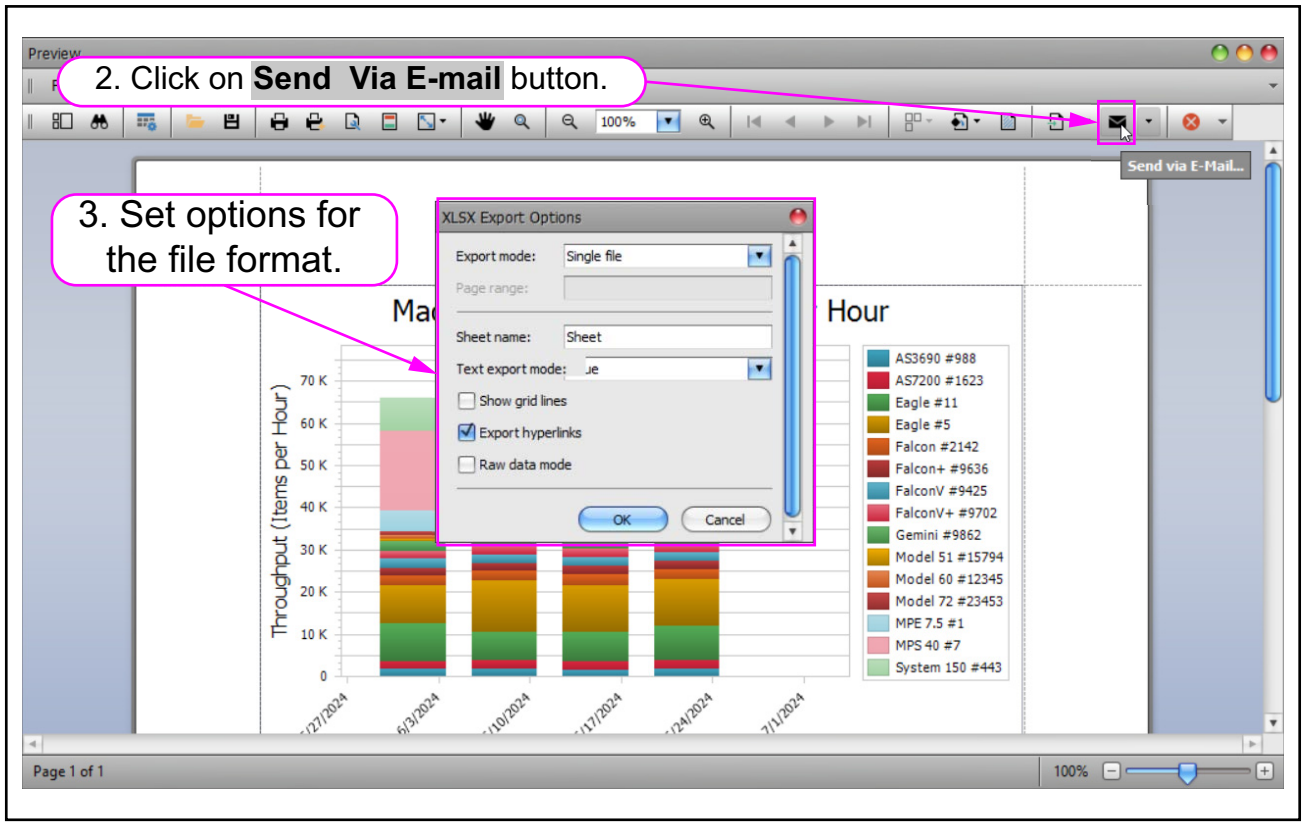


Figure 4-127: Emailing Using a Recent Format

The rest of the steps are that same as when you email a report from the **Send via E-Mail** drop-down button in the toolbar.

4.8.7. Emailing a Report Card

To email a Report Card, click on the **`Send via E-Mail`** button or **`Send via E-Mail`** drop-down button on the Report Card toolbar (Figure 4-128). The rest of the steps are the same as emailing a report by using the **Print Preview** window.

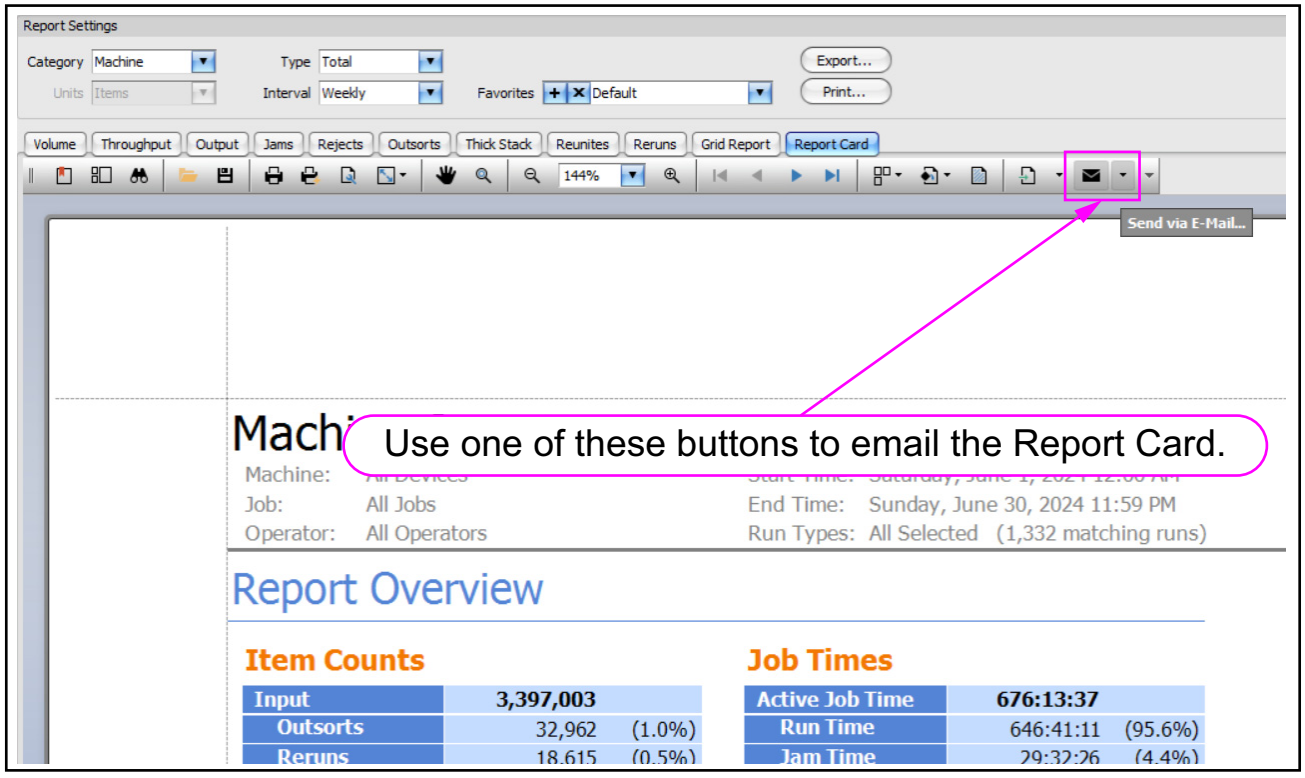


Figure 4-128: Emailing a Report Card

5. Machine Statistics Definitions

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5.1. Statistics Definitions

5.1.1. Scanner Stats Definitions

5.1.1.1. Report Card Overview Performance Measures

Table 5-1 lists the terms that appear in the **Report Overview** section of an ONS+ Machine Stats report card.

Table 5-1: Overall System Performance Measures terms

Term	Definition
Input	Number of pieces fed into the machine.
Output	Number of pieces successfully processed by the machine. This number is figured by subtracting the number of rejects from the number of pieces input.
Jam Rate	Number of jams per run. The formula for the Jam Rate is: $\text{Jam Rate} = \frac{\text{Jams}}{\text{Input}}$
Rejects	Number of pieces rejected.
Feed Rate	Number of pieces per hour the machine is currently feeding. The formula for the Feed Rate is: $\text{Feed Rate} = \frac{\text{Input} * 3600}{\text{Active Job Time (seconds)}}$
Output Rate	Number of pieces per hour the machine is processing. The formula for the Output Rate is: $\text{Output Rate} = \frac{\text{Output} * 3600}{\text{Active Job Time (seconds)}}$
Jam Clear Time	Average time the machine was halted while the Operator was clearing a jam. The formula for the Jam Clear Time is: $\text{Jam Clear Time (seconds)} = \frac{\text{Jam Time (seconds)}}{\text{Jams}}$

Table 5-1: Overall System Performance Measures terms (continued)

Term	Definition
Reference Feed Rate	Number of pieces fed into the machine per hour. The formula for the Reference Feed Rate is: $$\text{Reference Feed Rate} = \frac{\text{Input} * 3600}{\text{Run Time (seconds)} + (\text{Jams} * \text{Ref. Jam Clear Time (seconds)})}$$
Reference Output Rate	Number of pieces processed by the machine per hour. The formula for the Reference Output Rate is: $$\text{Reference Output Rate} = \frac{\text{Output} * 3600}{\text{Run Time (seconds)} + (\text{Jams} * \text{Ref. Jam Clear Time (seconds)})}$$
Reference Jam Clear Time	Estimated time it takes to clear a jam. This number is fixed at 20 seconds.

5.1.1.2. Performance Details statistics

Table 5-2 lists the terms that appear in the Performance Details section of the statistics report.

Note: *All times noted in the formulas in this table are in seconds. For example, if the Active Job Time appears as "00:01:49" then that means one minute (60 seconds) plus 49 seconds, or 109 seconds.*

Table 5-2: Performance Details terms

Term	Definition
Active Job Time	Time the machine was either actively running or was halted due to a jam. Active Job Time is broken down by: • **Run Time** • **Jam Time**
Run Time	Total run processing time.
Jam Time	Total time the machine was halted for a jam.

Table 5-2: Performance Details terms (continued)

Term	Definition
Idle Time	Time the Operator was in the Run Job window, but the machine was not processing pieces.

The Rejects section of a Report Card lists the reasons for the rejected items (Table 5-3) and how many items were rejected for each reason. These only appear in the report if a reject of the specified type has occurred.

Table 5-3: Reasons for rejected items

Length Too Long	Results when an image is longer than the maximum allowable image size of the system, or when outsorting is set to reject an image longer than a defined length.
Length Too Short	Results when outsorting is set to reject an image shorter than a defined length.
Gap Too Small	Results when the gap between pieces is shorter than the minimum feed gap defined in the machine parameters.
Too Thin	Results when outsorting is set to reject a piece thinner than a defined minimum allowable thickness.
Too Thick	Results when outsorting is set to reject a piece thicker than a defined maximum allowable thickness.
Unable to Capture Image	Results when the imager fails to capture the image within the period of time that it is expected to.
Unable to Process Image	Results when an image fails processing due to a failure other than running out of processing time.
Blank Image Detected	Results when a job is set to reject blank pages and the piece was determined to be a blank page.
Does Not Match Expected Page Types	Results when the system could not match a piece to any of the page types in a particular job.
Bad MICR Read	Results when the result from the combined MICR read does not have sufficient valid characters or a valid checksum.

Table 5-3: Reasons for rejected items (continued)

Batch Ticket Expected	Results when a piece is identified as something other than a batch ticket when the system is expecting a batch ticket.
Stub Expected	Results when a piece is identified as something other than a stub when the system is expecting a stub.
Check Expected	Results when a piece is identified as something other than a check when the system is expecting a check.
Page Expected	Results when a piece is identified as something other than a page when the system is expecting a page.
Envelope Expected	Results when a piece is identified as something other than an envelope when the system is expecting an envelope.
Money Order Expected	Results when a piece is identified as something other than a money order when the system is expecting a money order.
Cash Expected	Results when a piece is identified as something other than cash when the system is expecting cash.
Check Listing Expected	Results when a piece is identified as something other than a check listing when the system is expecting a check listing.
Batch Limit Detected	Results when the maximum transactions, pieces, stubs, or checks as defined in the batch parameters has been reached.
Last Transaction Not Complete	Results when the current transaction does not fit the defined transaction criteria and a piece is identified as a page type that defines a new transaction.
Current Transaction Already Complete	Results when a transaction has met its defined criteria and a new piece that is not defined to start a new transaction is identified.
Batch Ticket Not Expected	Results when a piece is identified as a batch ticket after valid pieces are already included in the batch unless auto batch mode is in use.
Ran Out of Time Processing Image	Results when the software has run out of the time that it has available to process a particular image. The amount of time it has available depends upon track speed.

Table 5-3: Reasons for rejected items (continued)

Could Not Detect Document Edges	Results when image processing is unable to detect the edges of an item that has been scanned.
No Page Sub-Type Selected	Results when a piece is identified as one with page sub-types and no default page sub-type has been specified and the operator did not make a page sub-type selection.
ScanLink Plug-in Requested a Reject	Results when the ScanLink plug-in has requested that the piece be rejected.
ScanLink Plug-in Timed Out	Results when the host has not received a response back from the ScanLink Plug-in within the required amount of time.
Could Not Create a Batch	Results when the software was unable to create a batch due to an inability to open and write a new file or an error within the system.
Detected a Duplicate Batch	Results when the software has detected a duplicate batch either via the used batch list or by finding batches in the batch directories with the same batch number.
Failed Saving Image	Results when there is an error trying to add or rescan a piece to a batch.
Magnetic MICR Response Missing	Results when the software does not receive a response from the magnetic MICR when it is expecting one.
Cannot Process Printer Data	Results when there is an error in sending the audit trail information down to the printer.
Required Item Expected	Results when an item is of the wrong priority to be scanned in the current location within a transaction (Structured batches only).

Table 5-3: Reasons for rejected items (continued)

Only One Item of this Type Expected	Results when only one item of the scanned item's priority is allowed, and that required item is already present within the batch (Structured batches only).
New Transaction Required	Results when a new transaction must be started in order to add this item to the batch (Structured batches only).
Jamsorts	All input pieces immediately following a reject when the job parameter “Stop Machines for Rejects” is set to something other than **No** until the reject is cleared. All input pieces immediately following a jam until the jam is cleared.

5.1.2. Capital Equipment Stats Definitions

5.1.2.1. Overall System Performance Measures

Table 5-4: Overall System Performance Measures Terms

Input	Number of envelopes to enter the paper path via the feeder module.
Outsorts	Number of envelopes deemed unsuitable for processing.The statistic report contains a list of counts for each outsort category. Each envelope that is directed to the Outsort Bin will only increase one category on the list. If a piece has the potential to increase multiple categories, only the first category in the list is increased.
Output	Transactions that have passed through the Extract module and have been sent to either the reunite bin or one of the stacker bins.
Jam Rate	Number of jams per run. The formula for the Jam Rate is: $\text{Jam Rate} = \frac{\text{Jams}}{\text{Input}}$
Run Type	Shows how much of the job was run on the machine and how much of the job was run from the IEM refeeders.

Table 5-4: Overall System Performance Measures Terms (continued)

Feed Rate	Number of envelopes per hour the machine is currently feeding. The formula for the Feed Rate is: $\text{Feed Rate} = \frac{\text{Input} * 3600}{\text{Active Job Time (seconds)}}$
Output Rate	Number of envelopes per hour the machine is processing. The formula for the Output Rate is: $\text{Output Rate} = \frac{\text{Output} * 3600}{\text{Active Job Time (seconds)}}$
Jam Clear Time	Average time the machine was halted while the operator was clearing a jam. The formula for the Jam Clear Time is: $\text{Jam Clear time} = \frac{\text{Jam Time}}{\text{Jams}}$
Reference Feed Rate	This calculation approximates the feed rate (in pieces per hour) if jams are cleared in the time designated by the Reference Jam Clear time: $\text{Reference Feed Rate} = \frac{\text{Input} * 3600}{\text{Run Time (seconds)} + (\text{Jams} * \text{Ref. Jam Clear Time (seconds)})}$
Reference Output Rate	This calculation approximates the machine output rate (in pieces per hour) if jams are cleared in the time designated by the Reference Jam Clear time: $\text{Reference Output Rate} = \frac{\text{Output} * 3600}{\text{Run Time (seconds)} + (\text{Jams} * \text{Ref. Jam Clear Time (seconds)})}$
Reference Jam Clear Time	Estimated time it takes to clear a jam. This is set at 20 seconds by default, but most sites have set it to 30 seconds. The Reference Jam Clear Time is used to calculate Reference Feed and Reference Output Rates, which are intended to provide the rates the machine would achieve if the operator cleared jams within a certain period of time.

5.1.2.2. Performance Details

Table 5-5: Performance Details Terms

Active Job Time	Amount of time the machine was either actively running or halted due to a jam. Active Job Time is further broken down into: • Run Time: the time spent processing mail • Jam Time: the total time the system was halted for a jam
Idle Time	Time the operator spent with the Run screen open without a job running.
Outsorts	The Outsorts section of the Performance Details lists the number of envelopes that the machine could not process and the reasons why.
Output	The Output section of the Performance Details lists the number of transactions that were processed by the machine. Keep in mind that in addition to clean mail and rejects, “Output” also includes reunites and Jamsorts.

5.1.2.3. Overall Jam Data

Table 5-6: Overall Jam Data terms

Jams	Reports occasions when run was halted due to a paper jam or a processing problem that was machine related.
Jam Index	Description not yet available
Stops	Any time the machine is halted due to a problem which could have been avoided by the operator (i.e., feed empty, no bin available, etc.).
Stop Index	Description not yet available

5.1.2.4. Jam/Stop Information

Table 5-7: Jam/Stop Information terms

Reorder Gate 2 Sensor Missing Jam	Reports occasions when run was halted due to a paper jam or a processing problem that was machine related.
Stops	Any time the machine is halted due to a problem which could have been avoided by the operator (i.e., feed empty, no bin available, etc.).

6. Toolbar, Menu Bar, and Table Features

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6.1. Resizing the Display

The Insight Dashboard window can be resized by dragging its borders (Figure 6-1).

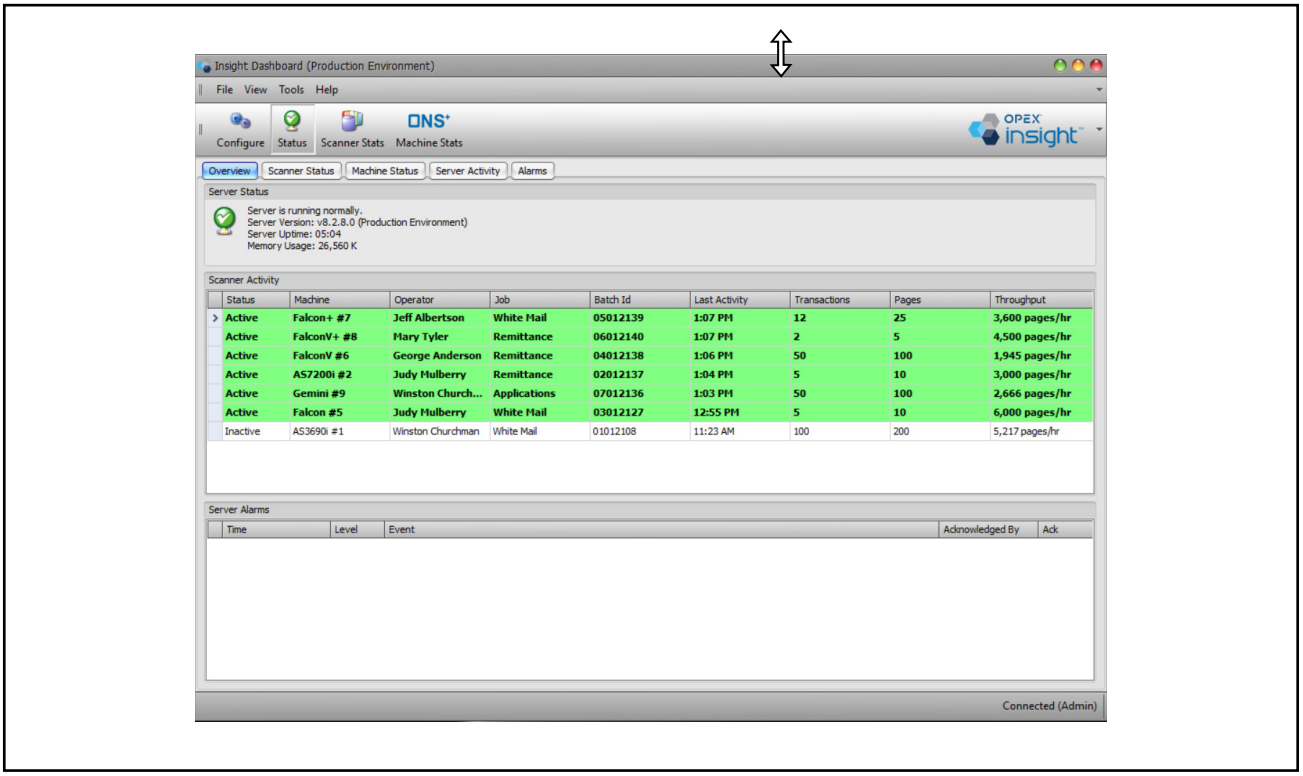


Figure 6-1: Resizing the Insight Dashboard window

In the upper right corner, buttons for minimizing, maximizing, and closing the window are displayed in green, yellow, and red, respectively (Figure 6-2).

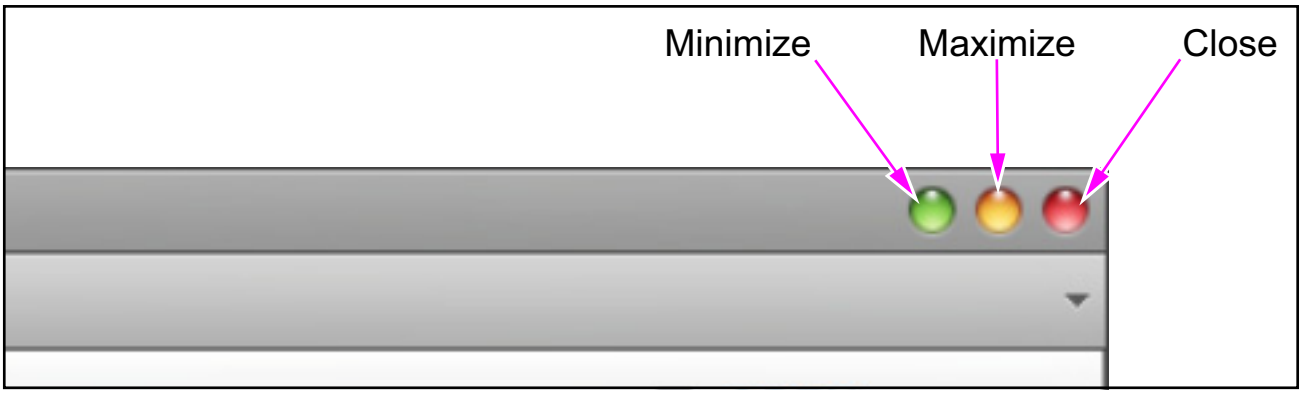


Figure 6-2: Minimizing, maximizing, and closing Insight Dashboard

6.2. Rearranging the Display Layout

The menu bar and toolbar can be dragged and dropped to different locations.

1. Drag from an empty space on the toolbar or menu bar. The toolbar or menu bar becomes undocked (Figure 6-3 and Figure 6-4).

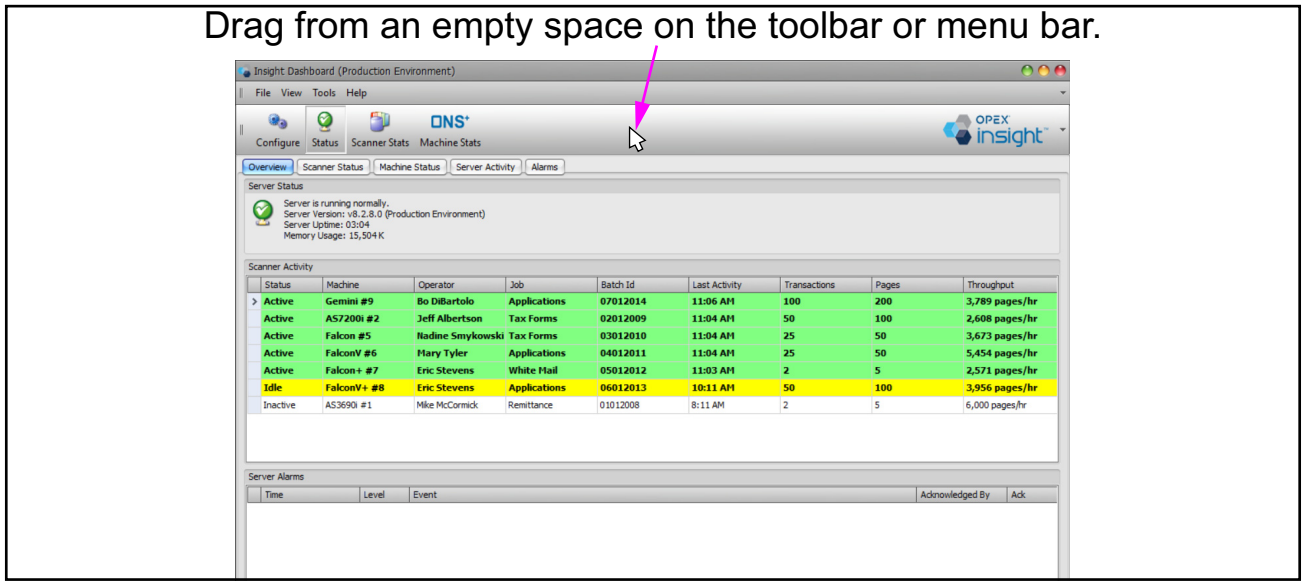


Figure 6-3: Example of dragging the toolbar

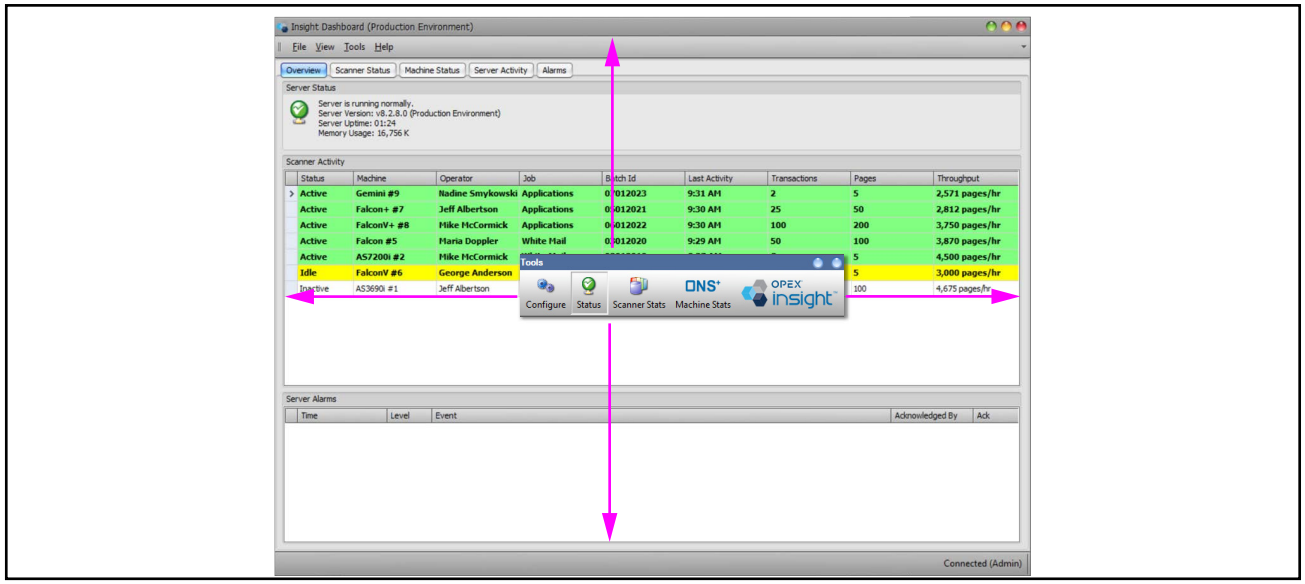


Figure 6-4: Dragging the toolbar in different directions

2. Drop (dock) in different locations around the module display. (Figure 6-5).

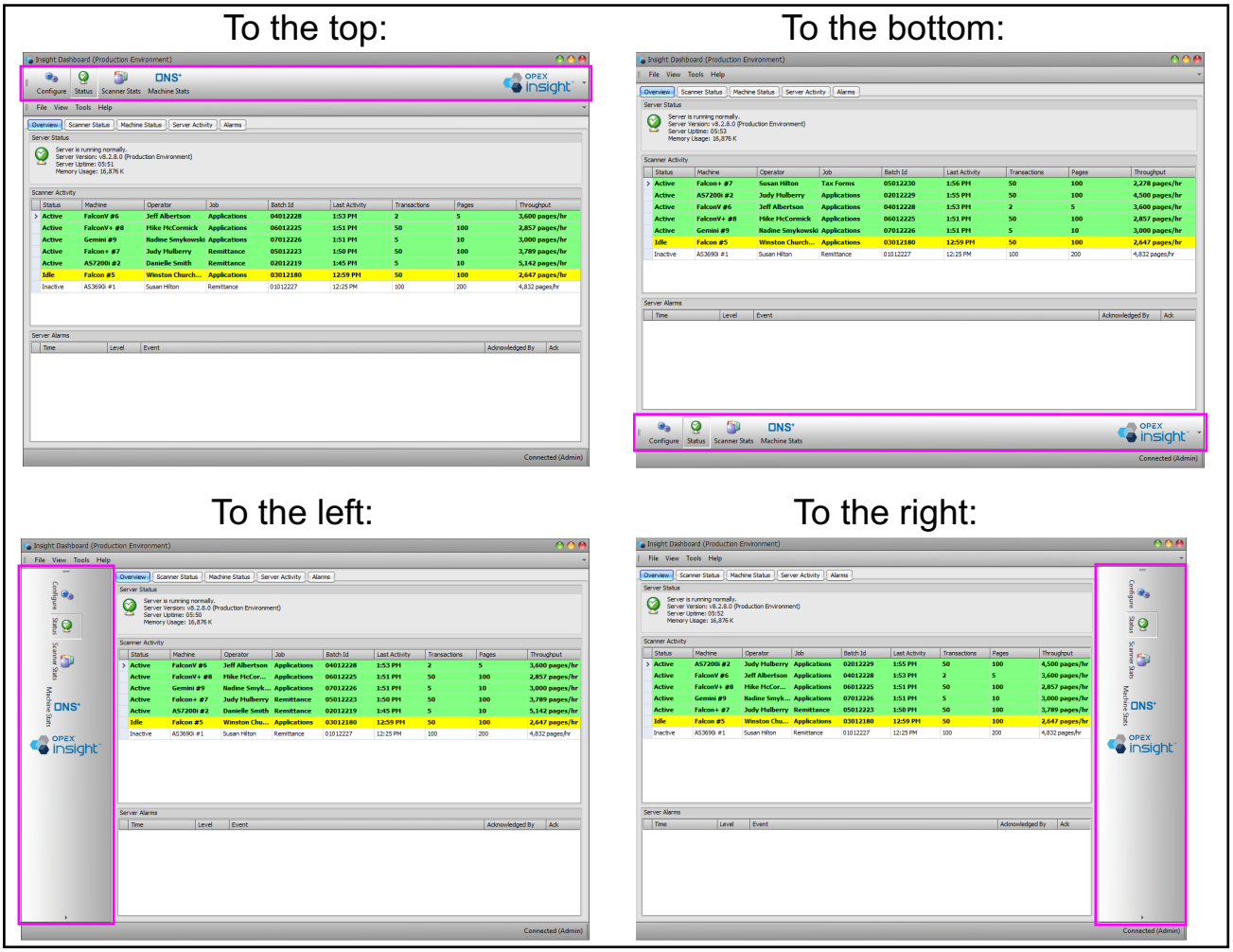


Figure 6-5: Examples of dropping the toolbar

Below is an example of dragging the menu bar to a desired location (Figure 6-6):

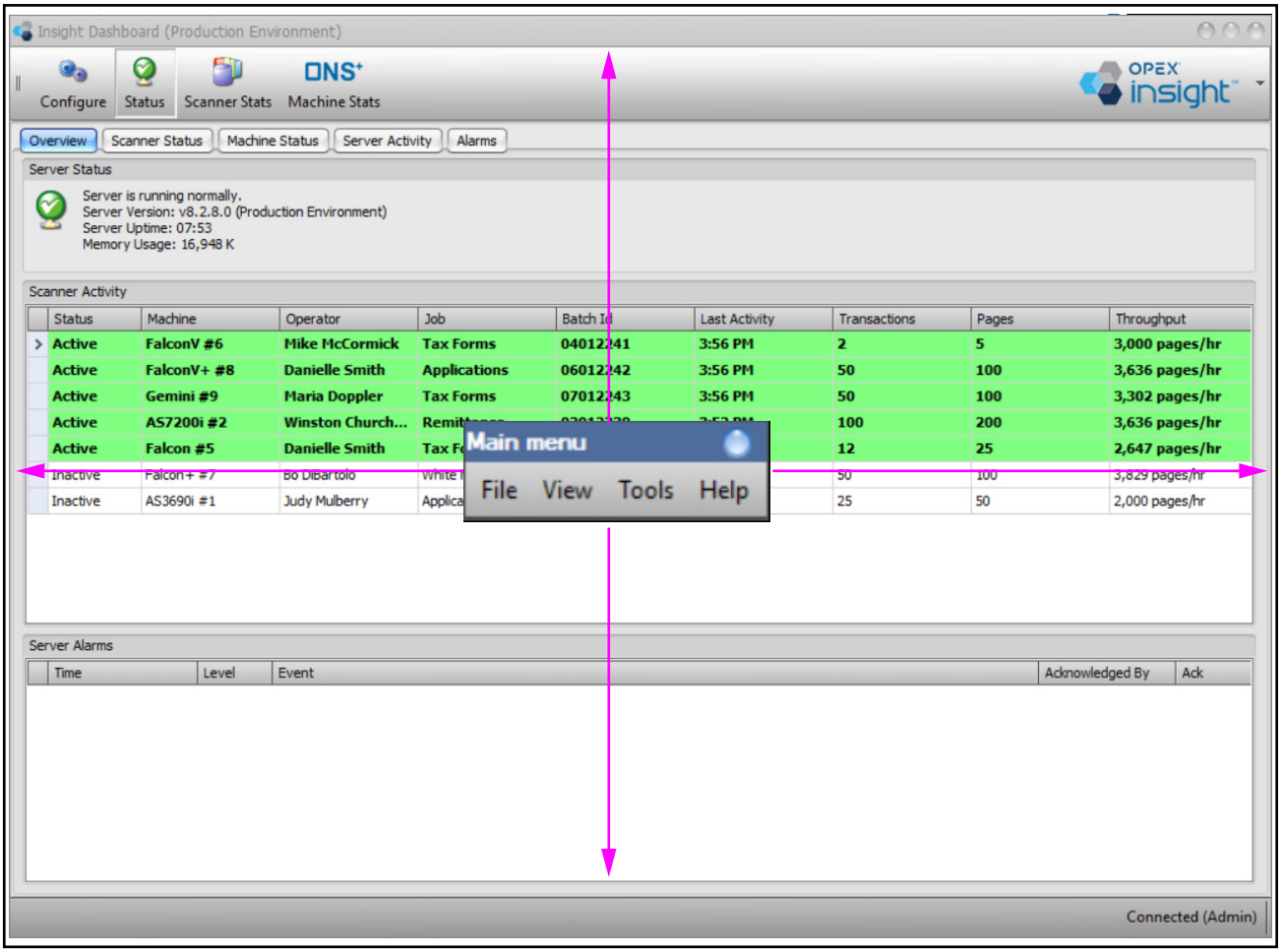


Figure 6-6: Example of dragging the menu bar

6.3. Menu Bar

The menu bar contains four main menu items:

- **File:** Menu item with one **Exit** sub-menu item for exiting the Insight Dashboard.
- **View:** Menu item used to adjust color pattern of the Insight Dashboard (Figure 6-7 and Figure 6-8).

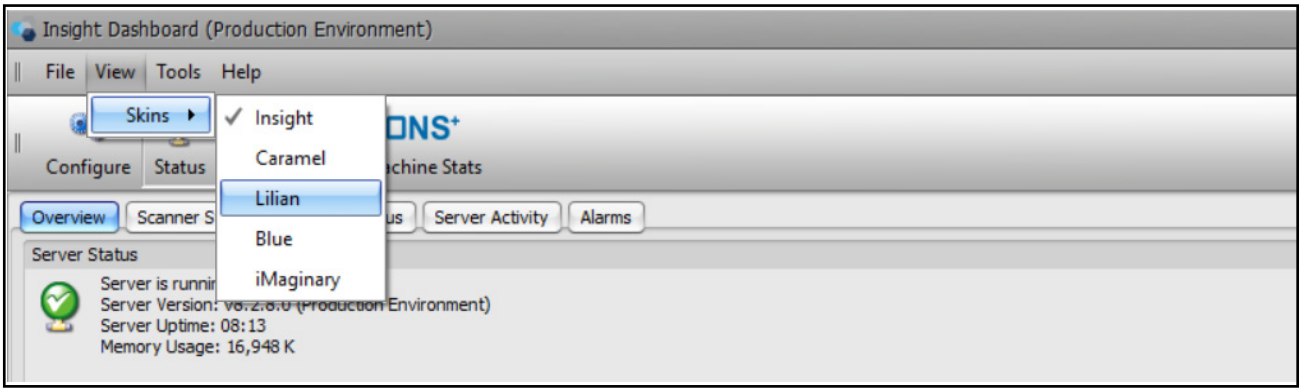


Figure 6-7: Using View to change the color pattern

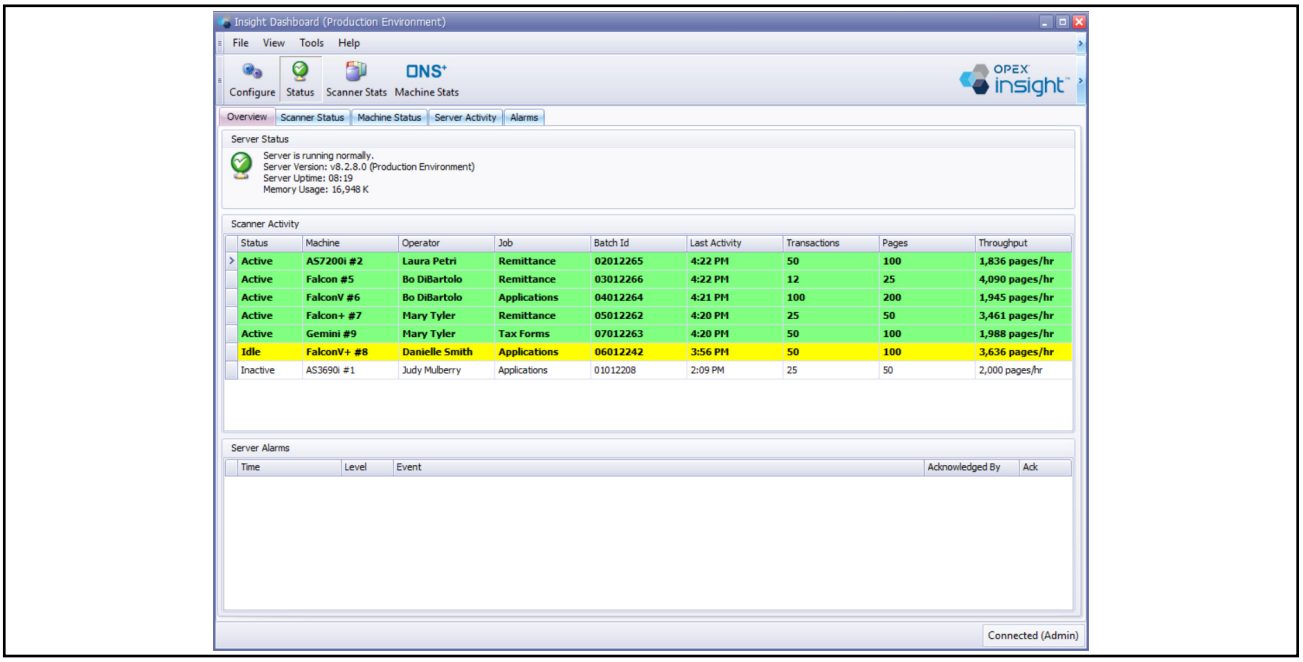


Figure 6-8: Example of using the "Lilian" color pattern

- **Tools:** Developer use only.
- **Help:** Menu item with sub-menu items that assist in solving issues or obtaining version information.

6.3.1. Help

The **Help** menu item contains four sub-menu items (Figure 6-9):

- **Show Event Log:** Diagnostic data for OPEX Tech Support use only.
- **Contact Mavro Support:** Do not use. In the event of a problem, call OPEX Tech Support.
- **View License Counts:** Developer use only.
- **About Insight Dashboard:** Used to display Insight version information.

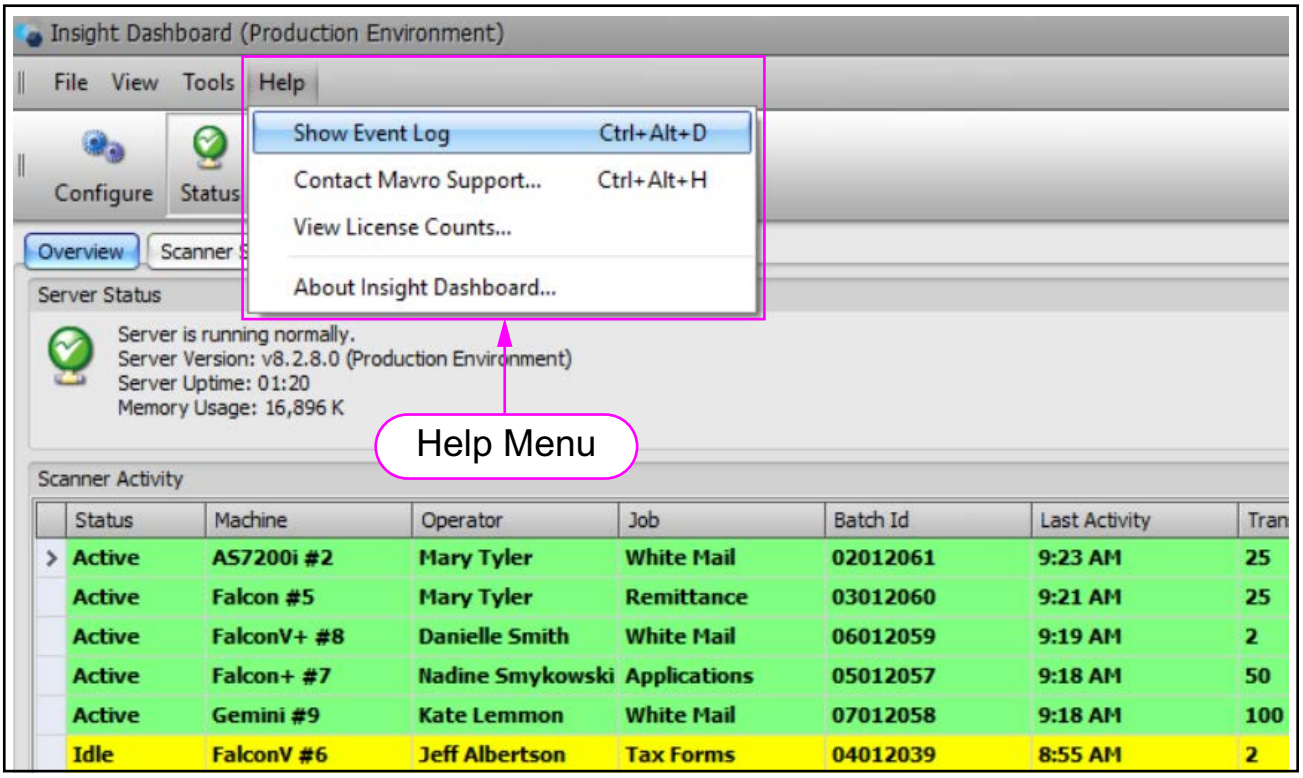


Figure 6-9: Help Menu

6.3.2. Menu Bar Add or Remove Buttons Feature

1. To customize the menu bar, click on the **Add or Remove Buttons** arrow at the right side of the menu bar (Figure 6-10).
2. Follow the **Add or Remove Buttons** sub-menu items to remove unwanted parts of the menu bar.

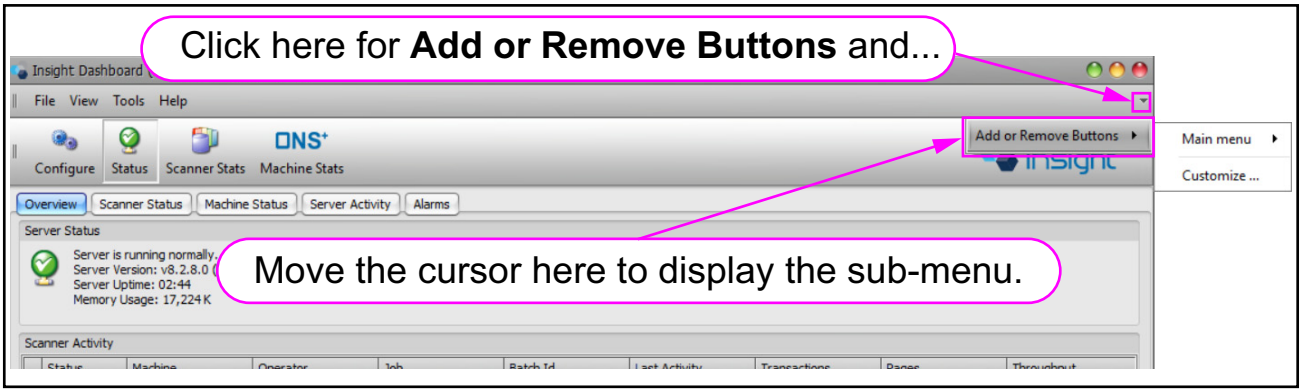


Figure 6-10: Add or Remove Buttons on the menu bar

6.4. Toolbar Add or Remove Buttons Feature

The toolbar has an **Add or Remove Buttons** feature similar to that of the menu bar (Figure 6-11), allowing you to customize which parts of the toolbar are visible.

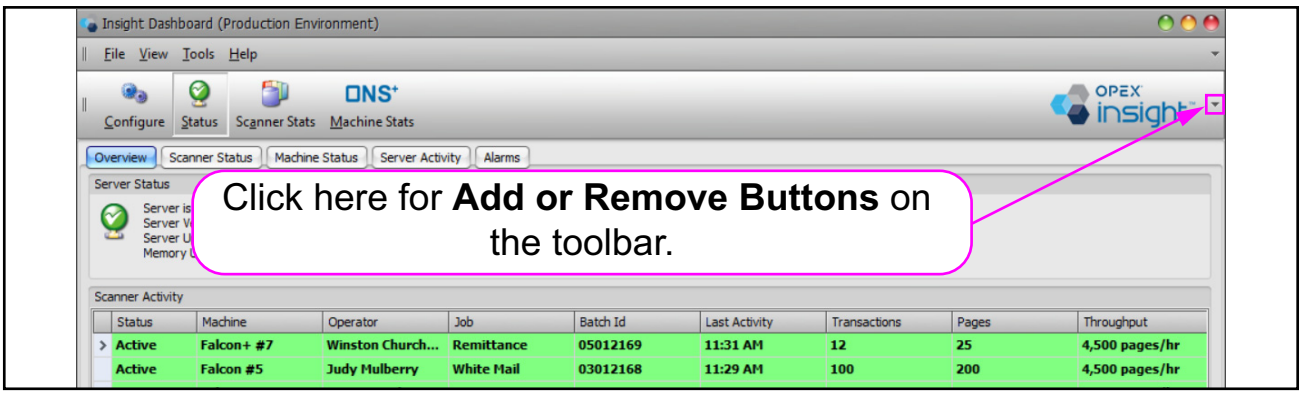


Figure 6-11: Add or Remove Buttons on the toolbar

6.5. Rearranging the Order of Table Columns

In all Insight Dashboard tables, you can move a column by dragging and dropping the column heading. Arrows are displayed to indicate where you can drop (place) a column (Figure 6-12 and Figure 6-13).

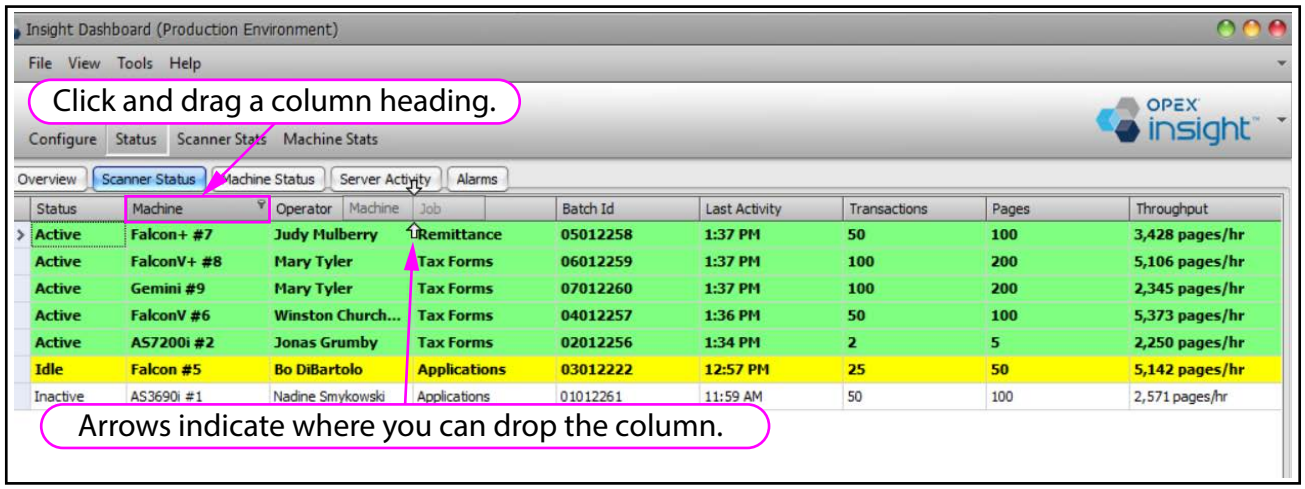


Figure 6-12: Moving a column

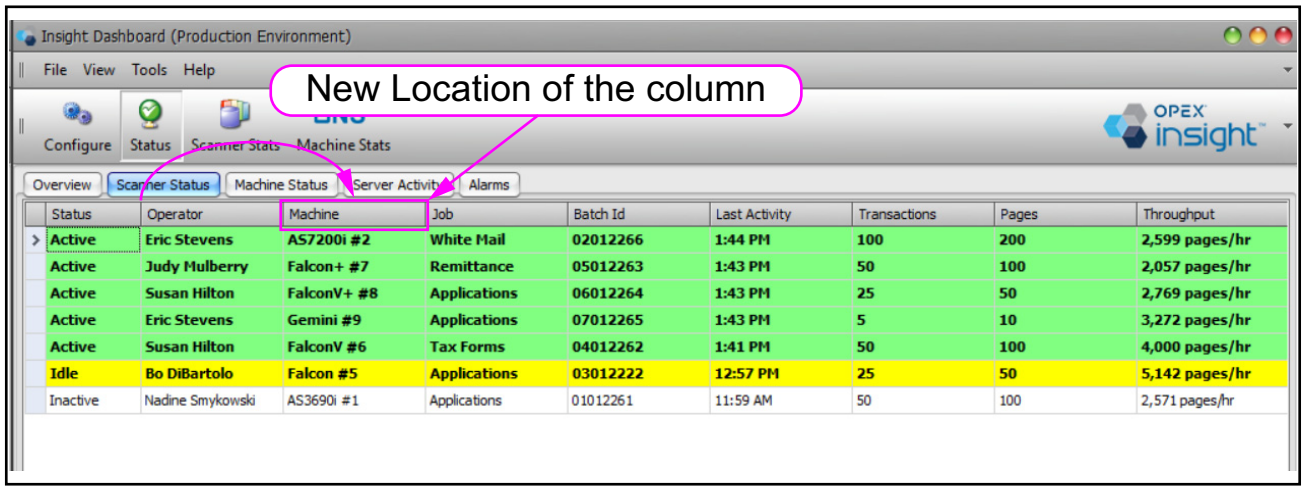


Figure 6-13: Result of moving the column

6.6. Manually Resizing Table Columns

1. Place the cursor on the boundary between two table headings. A horizontal double-arrow appears (Figure 6-14).
2. Click and drag the boundary until the desired column width is reached (Figure 6-14).

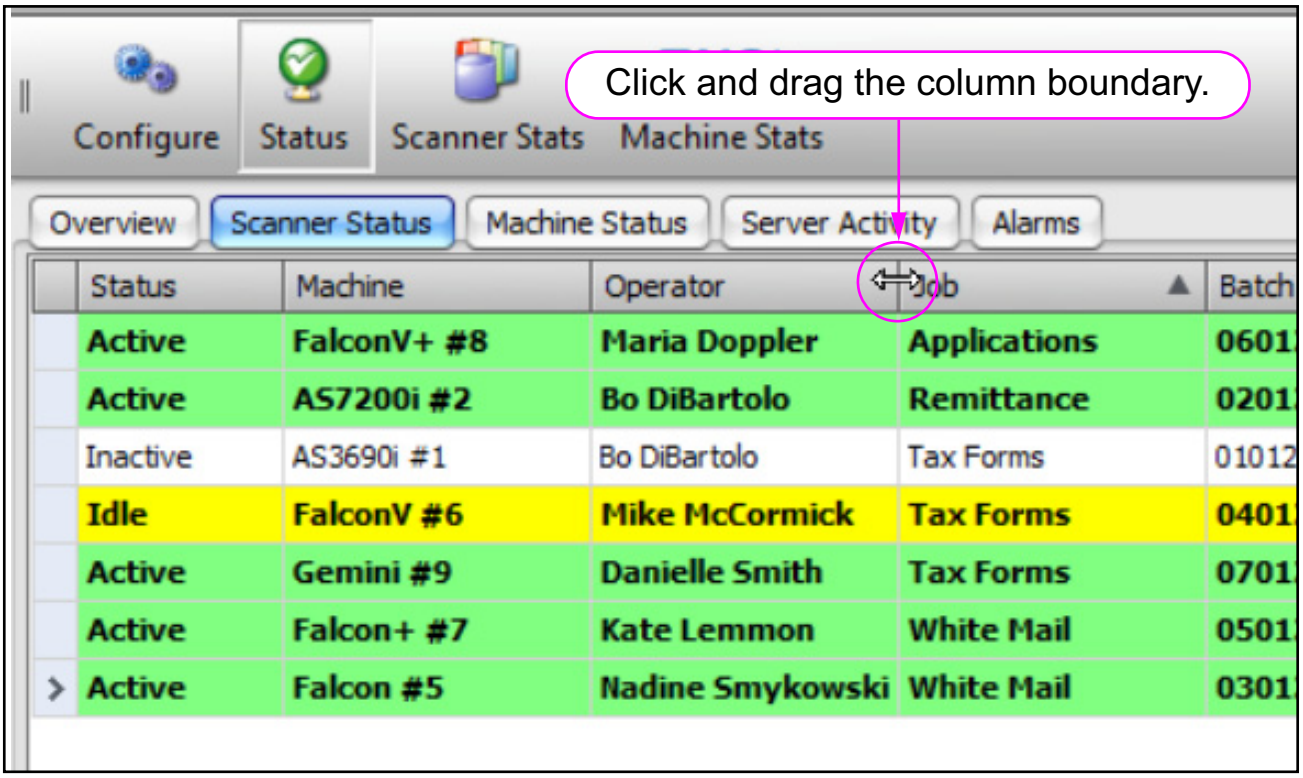


Figure 6-14: Manually resizing a table column

6.7. Filtering Tables

In Insight Dashboard tables, the heading of each column is interactive, allowing you to sort and filter the rows.

6.7.1. Using a Column Heading to Change Sorting Order

1. To sort rows in alphabetical or numerical order, click on a column heading.
   a. The sorting order changes.
   b. An icon appears in the upper right side of the column heading to indicate the direction of the sorting (Figure 6-15).
2. Click on the column heading again each time you want to change the direction of sorting between ascending and descending (Figure 6-15).

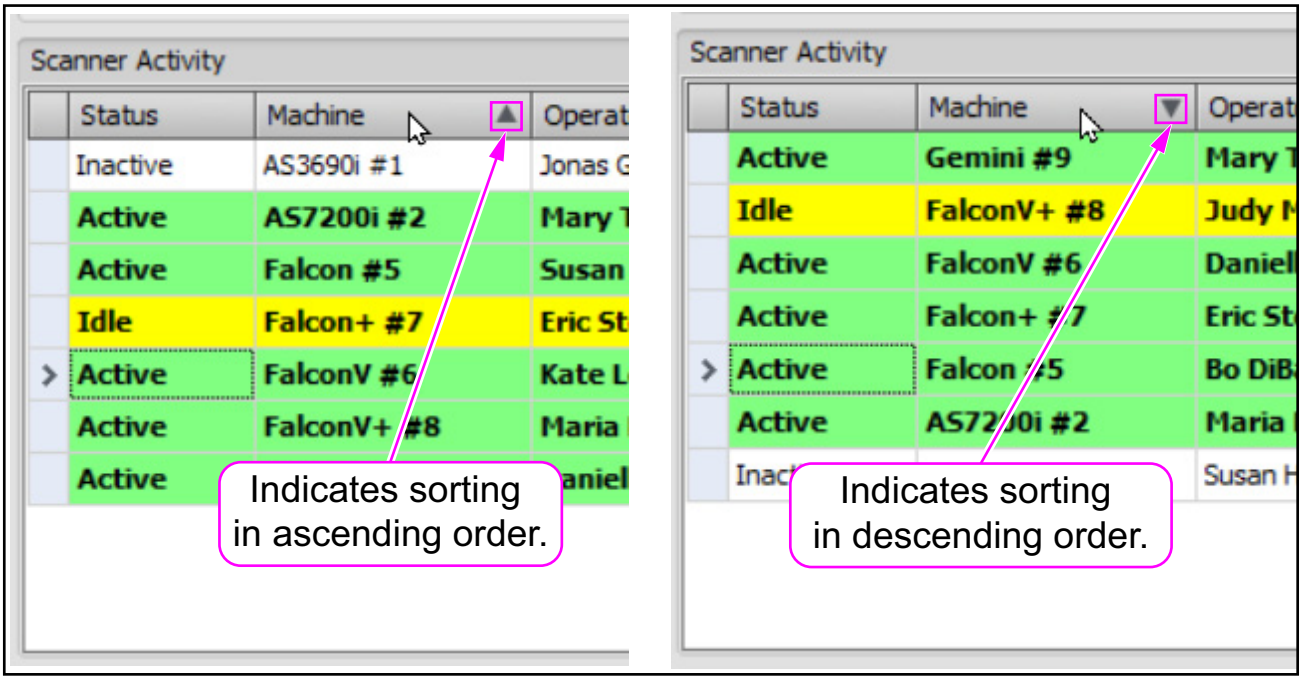


Figure 6-15: Sorting table rows

Note: *When clicking on the column headings for* `Last Activity`, `Transactions`, *and* `Pages`, *the rows are grouped by color (status). The rows in each color are sorted in ascending or descending order (Figure 6-16).*

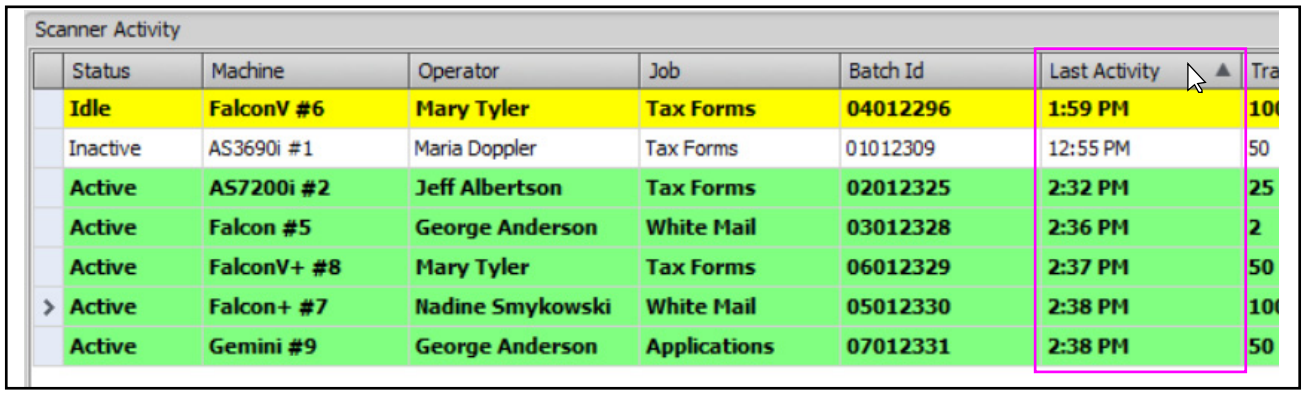


Figure 6-16: Clicking on the `Last Activity` ***Heading***

6.7.2. Selecting Items from a Table

You can control which rows of data are displayed based on items you select in one column.

1. Hold the mouse over a table heading. A sorting icon appears (Figure 6-17).

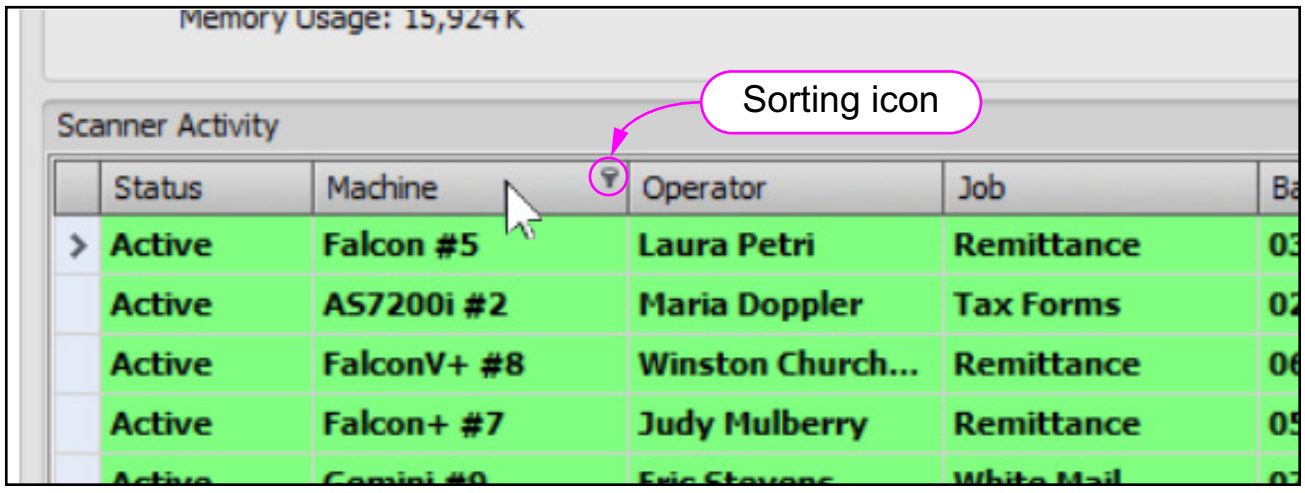


Figure 6-17: Sorting icon

2. Click on the sorting icon to display an item selection window, which has two tabs (Figure 6-18):
   - **Values**
   - **Text Filters**

Note: *The selection window varies according to the column.*

6.7.2.1. Using the Selection Window Values Tab

1. The **Values** tab is available first by default. In the **Values** tab, there are two ways to select items (Figure 6-18):
   - Check the boxes near the items you want displayed.
   - In the textbox, type the exact name of the item you want displayed.

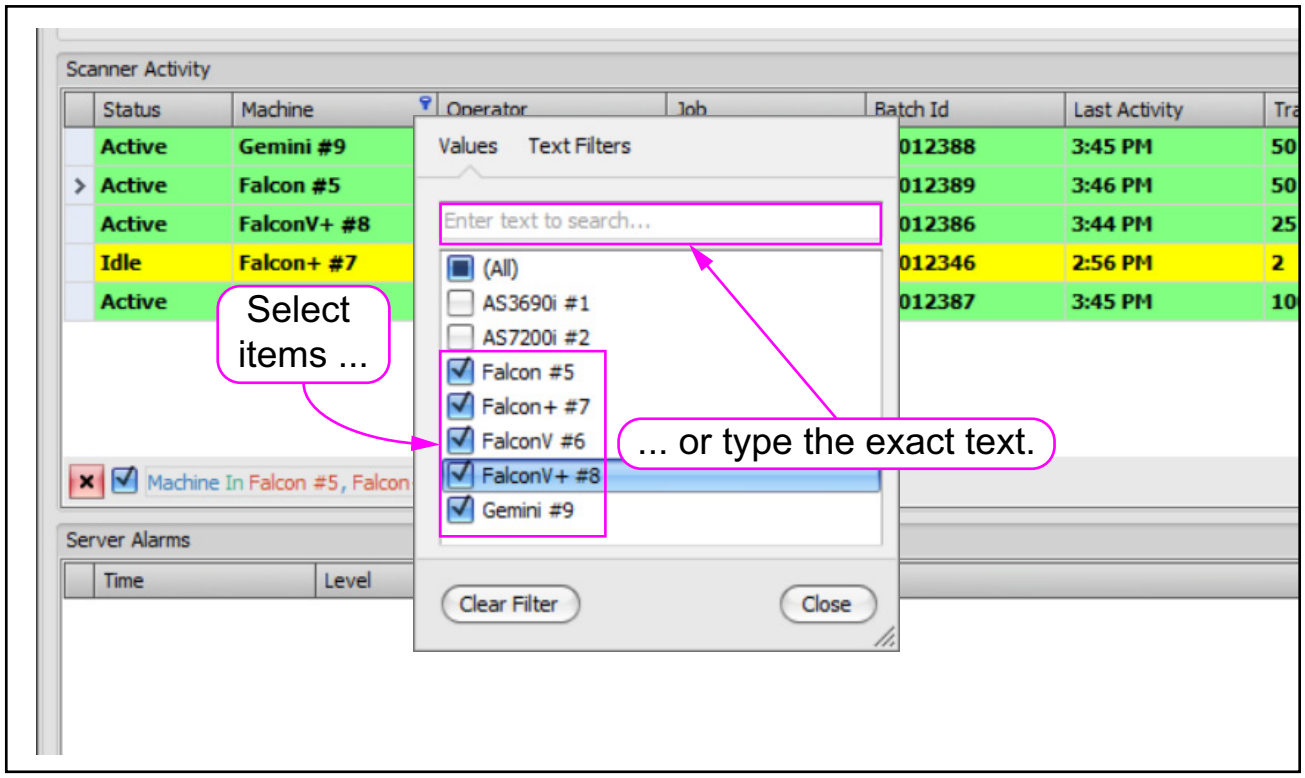


Figure 6-18: Item selection window

2. Click **Clear Filter** to clear all selections. Click **Close** to close the item selection window (Figure 6-19).

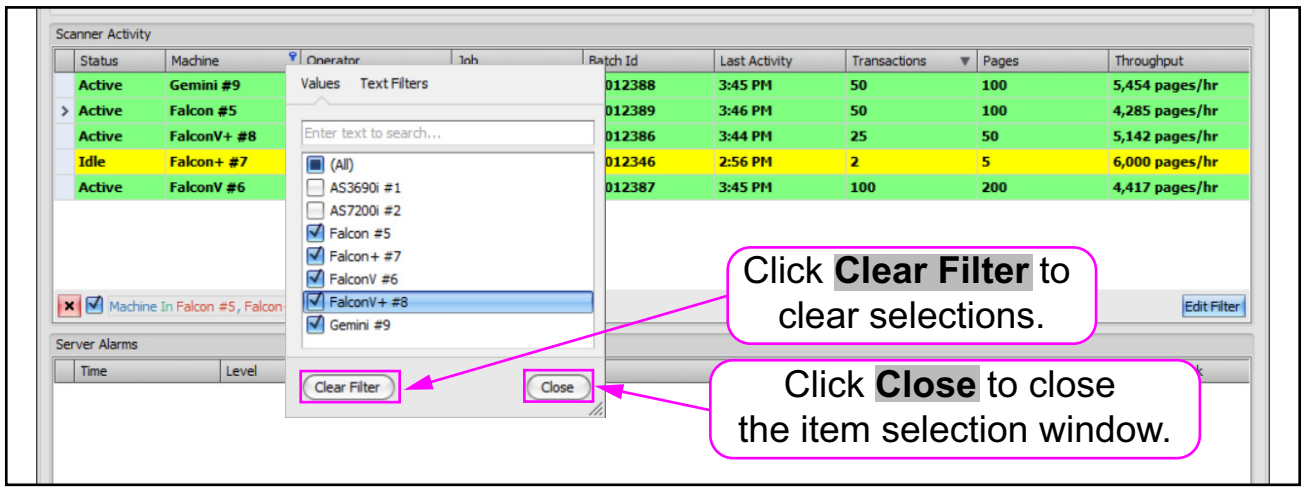


Figure 6-19: Clearing and Closing the item selection window

6.7.2.2. Using the Selection Window Text Filters Tab

1. Click on the **Text Filters** tab (Figure 6-20).

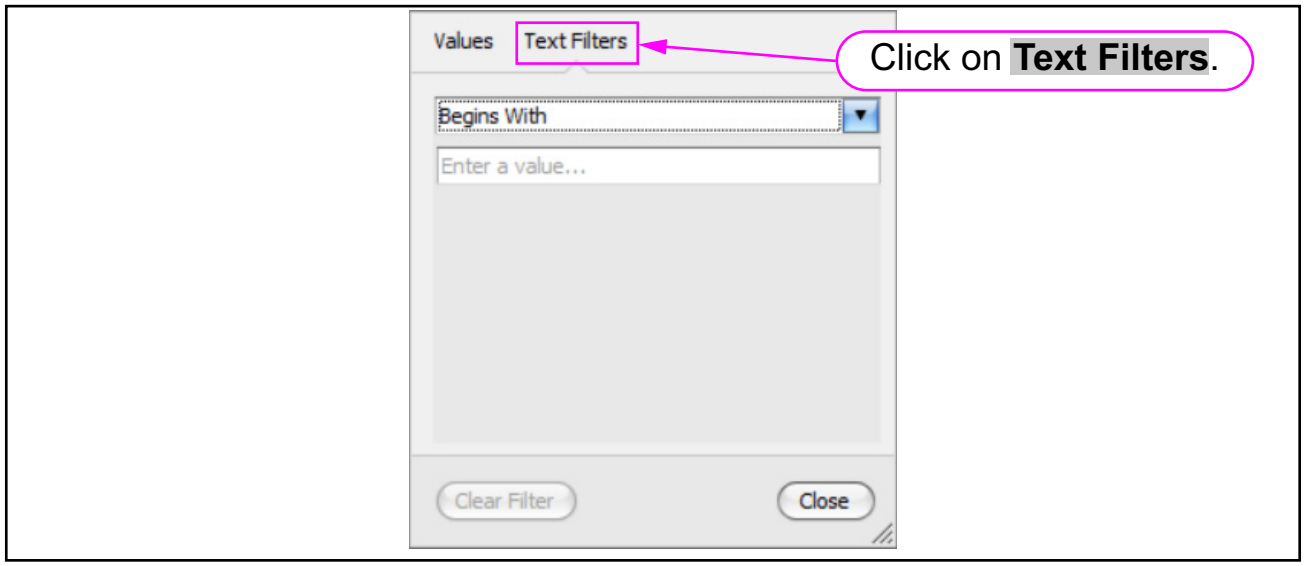


Figure 6-20: Clicking on the Text Filters tab

2. Click on the drop-down arrow to display a list of filters from which to choose (Figure 6-21).
3. Select a text filter.
4. Enter the filtering text.

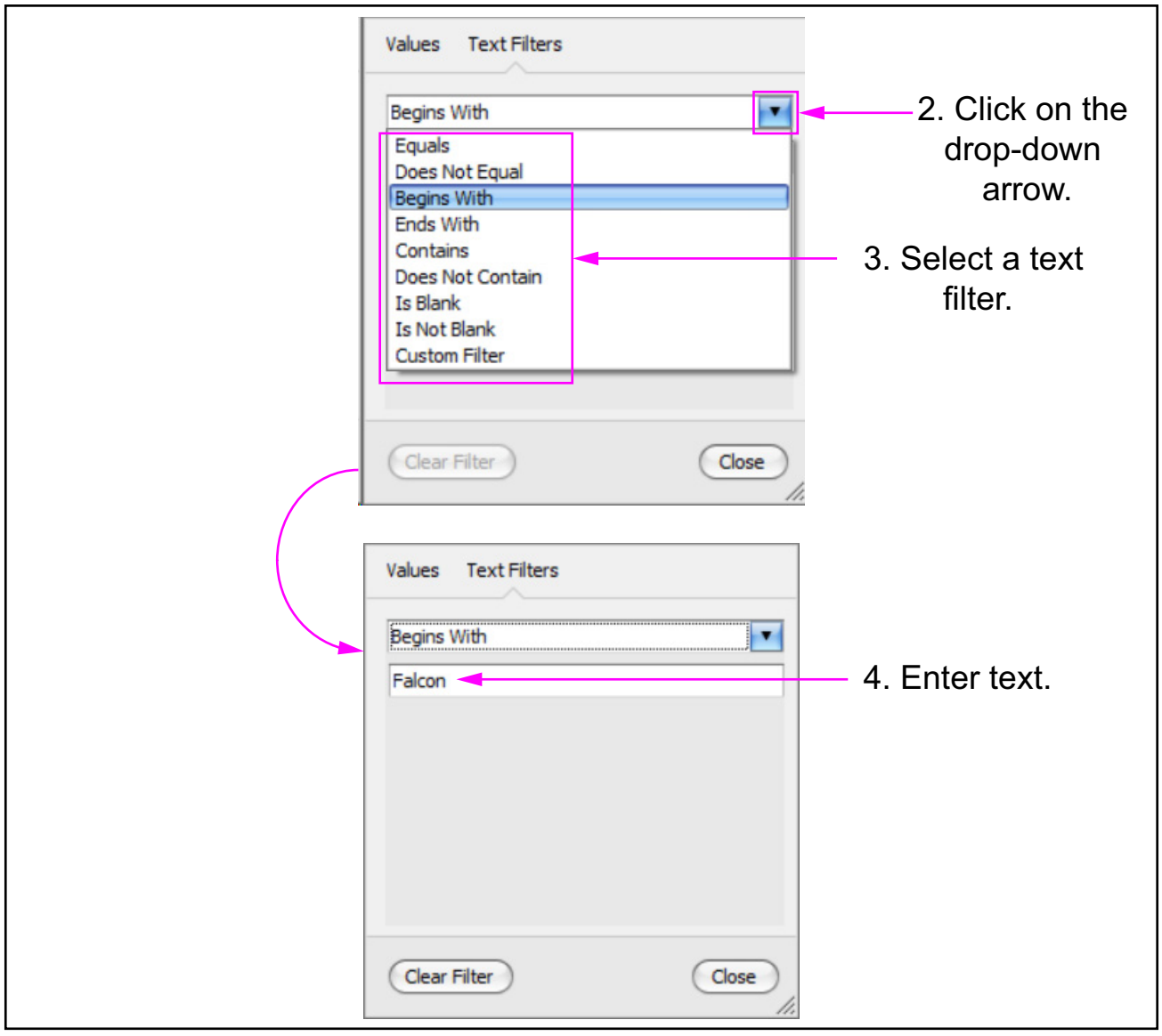


Figure 6-21: Displaying the text filter list

a. If you select **`Custom Filter`**, you have more flexibility in selecting items, as shown in an example in Figure 6-22:

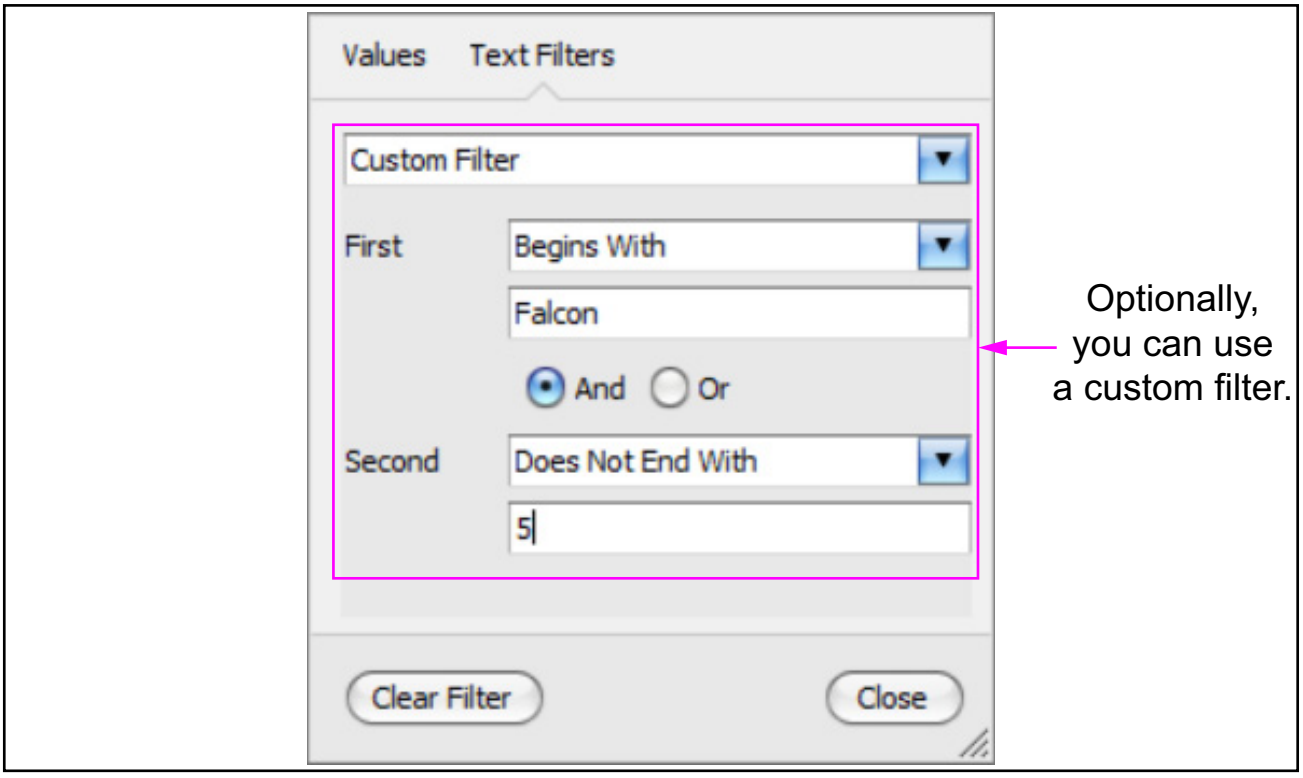


Figure 6-22: Selecting a custom filter

5. Click **`Clear Filter`** to clear all selections. Click **`Close`** to close the item selection window.

6.7.2.3. Selection Tools on the Bottom Left Side of a Table

1. Once the items are selected, additional filtering tools appear at the bottom of the table (Figure 6-23).
   a. Click on the red box with the x to clear the filter.
   b. Click the check box to toggle the filter on and off.

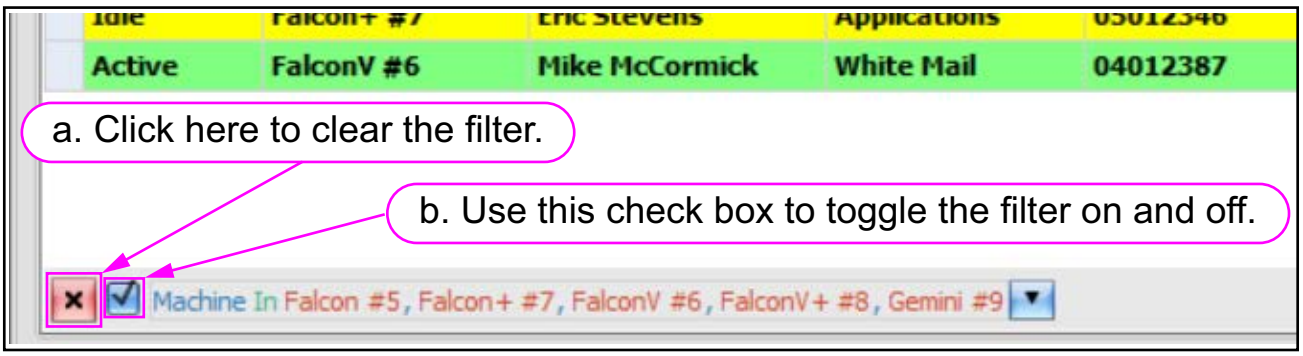


Figure 6-23: Bottom filtering tools

2. Optionally, click the bottom drop-down arrow to expand the filter history (Figure 6-24). (Each time you previously changed the filter selections, the change was recorded as a line of chosen items in the filter history.)
3. Optionally, select a previous set of selections in the filter history.

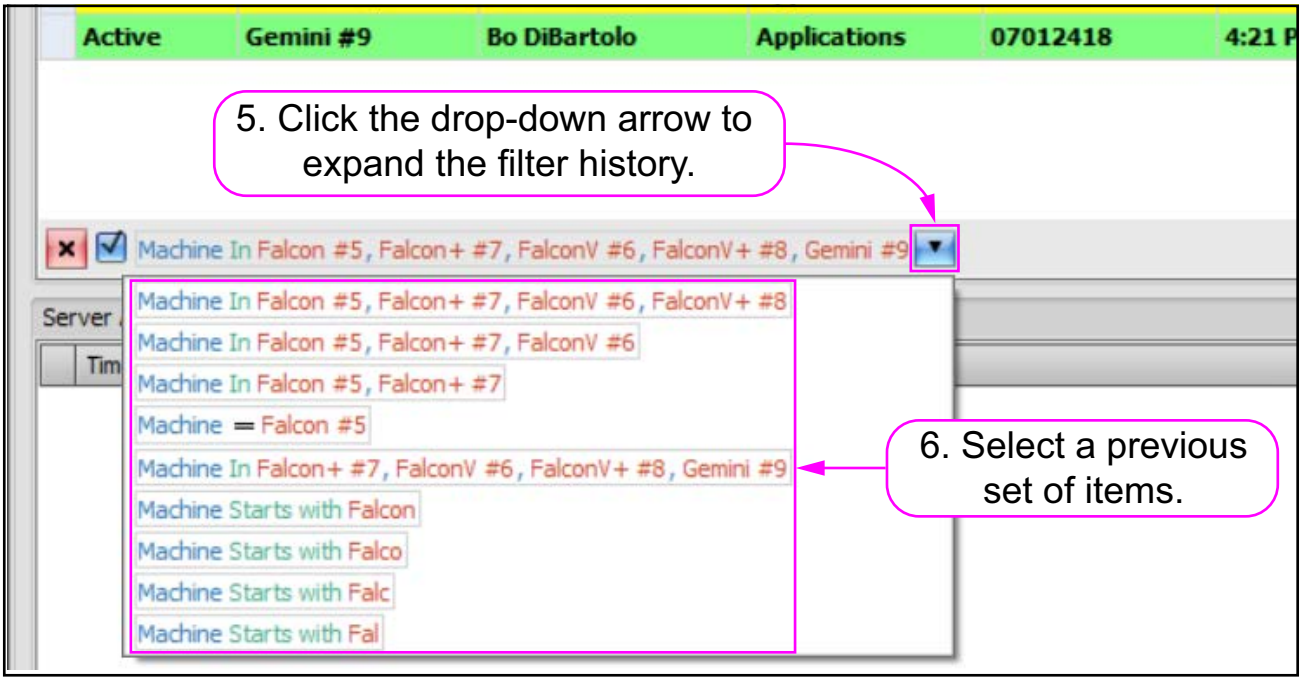


Figure 6-24: Expanding the filter history

6.7.2.4. Filter Editor Feature

Once items are selected, the **Filter Editor** button on the lower right of a table can be used to further filter the items manually (Figure 6-25):

1. Click `Edit Filter`. The **Filter Editor** window opens.
2. Manually enter filtering conditions.
3. Click `Apply`.
4. Click `OK` to close the **Filter Editor**.

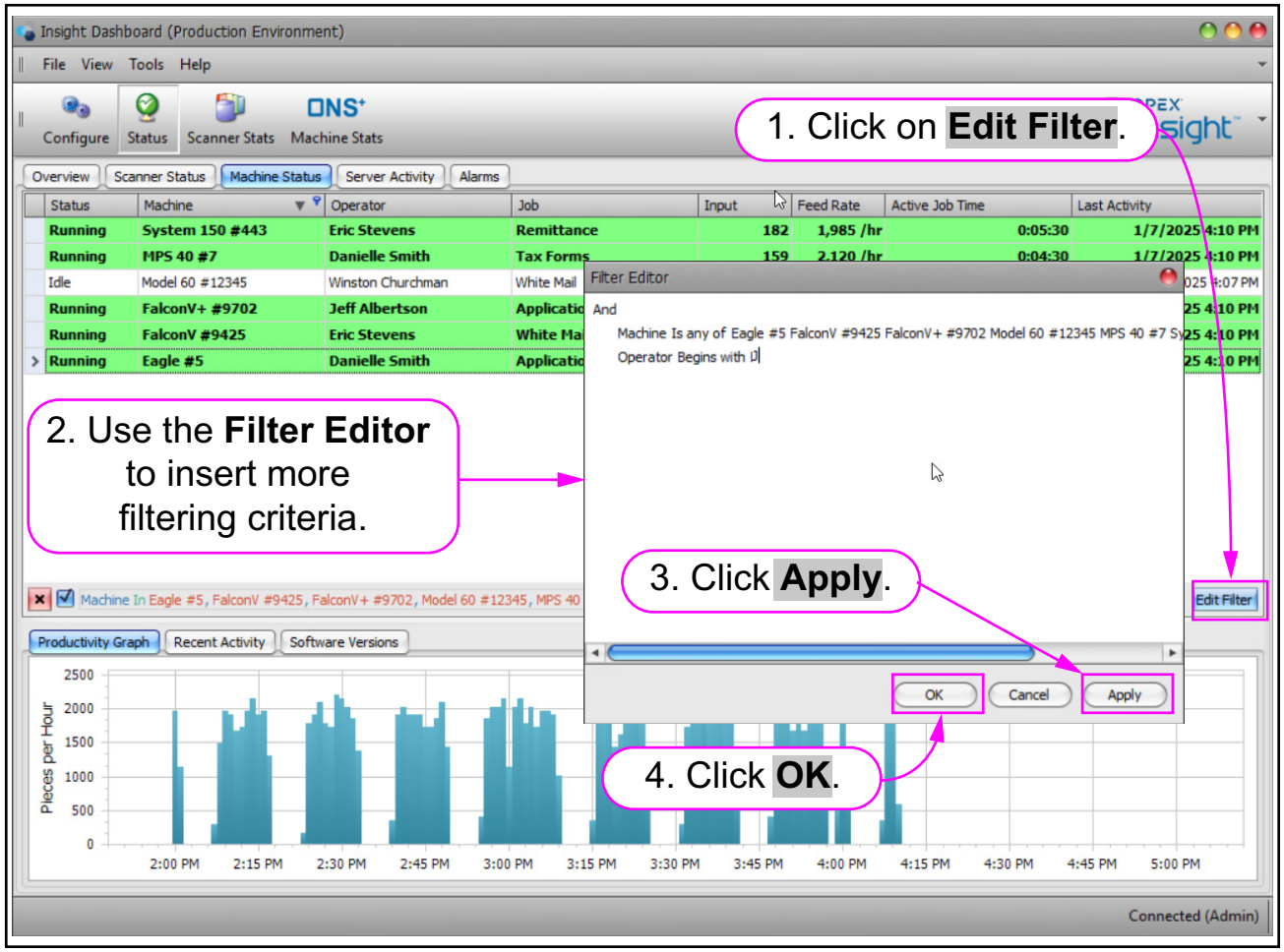


Figure 6-25: Using the Edit Filter button

6.7.3. Column Heading Menu

Right-click on a table column heading. A column heading menu with more filtering options is displayed (Figure 6-26).

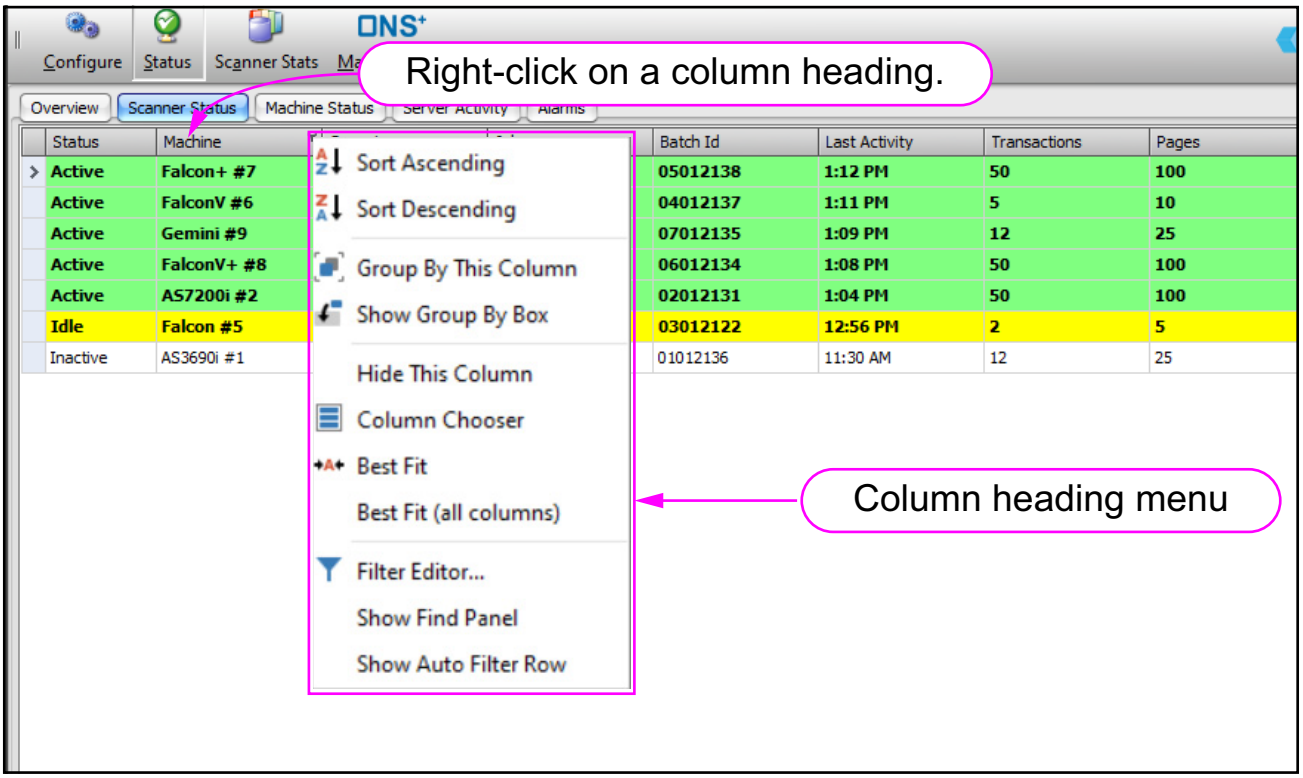


Figure 6-26: Displaying the column heading menu

6.7.3.1. Sort Ascending and Sort Descending Menu Items

In addition to clicking on a column heading to change the sorting order (as was previously discussed), you can right-click on a column heading and select **`Sort Ascending`** or **`Sort Descending`** from the column heading menu (Figure 6-27).

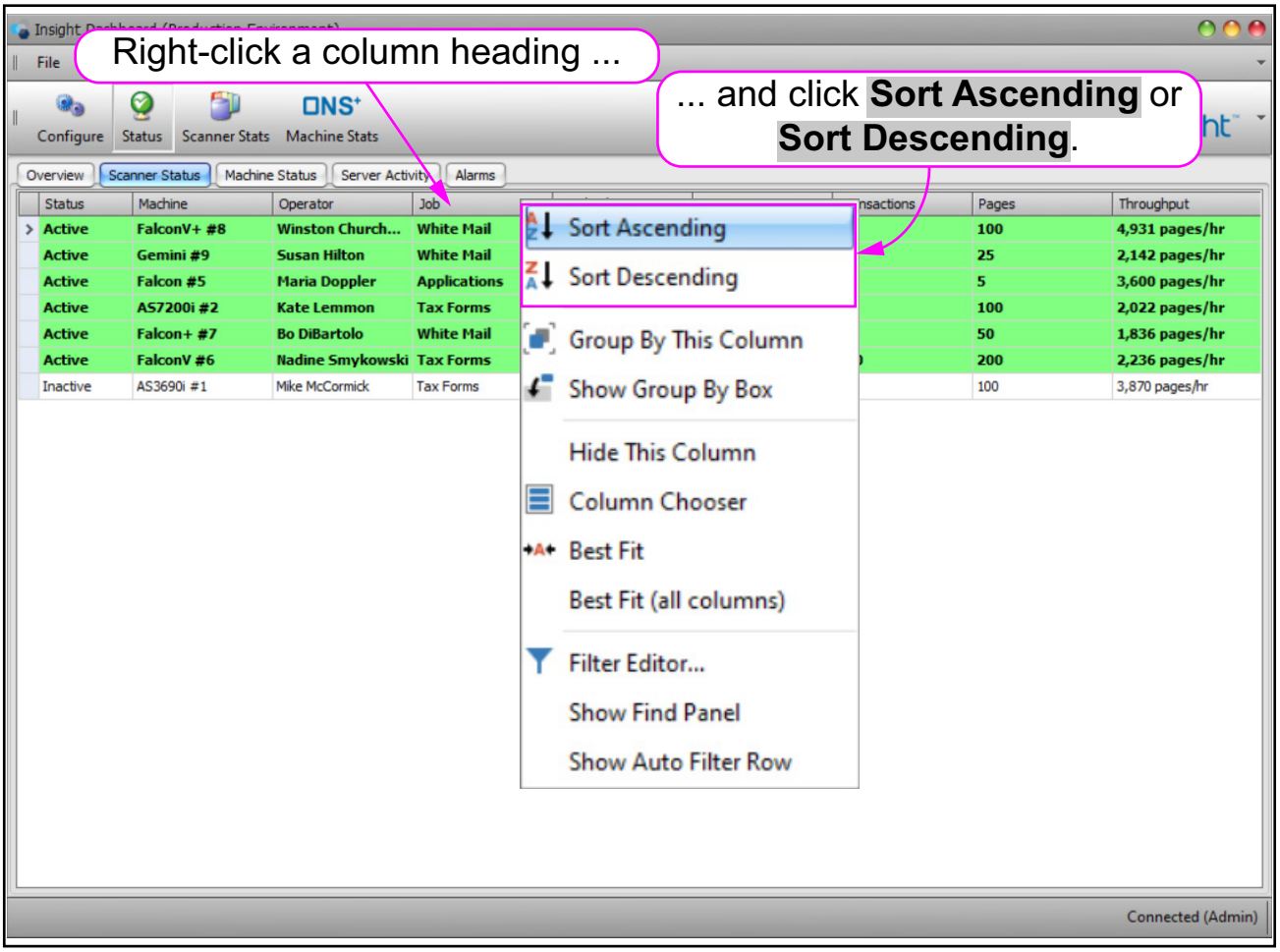


Figure 6-27: Clicking **`Sort Ascending`** ***or*** **`Sort Descending`**

6.7.3.2. Clear Sorting and Clear All Sorting

After using either of the **`Sort Ascending`** or **`Sort Descending`** menu items, the **`Clear Sorting`** and **`Clear All Sorting`** menu items become available. The following example illustrates how these menu items are used:

1. Right-click the **`Job`** heading and click on **`Sort Ascending`** (Figure 6-28). The rows are sorted according to ascending alphabetical order of the job column (Figure 6-29).

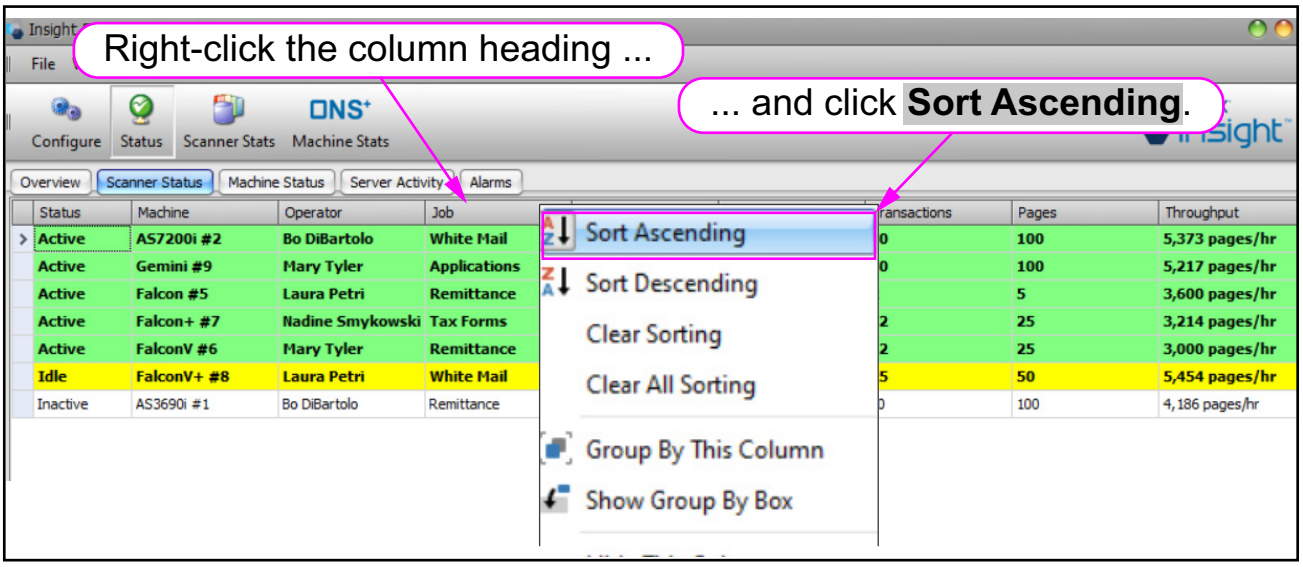


Figure 6-28: Selecting `Sort Ascending` on the Job column

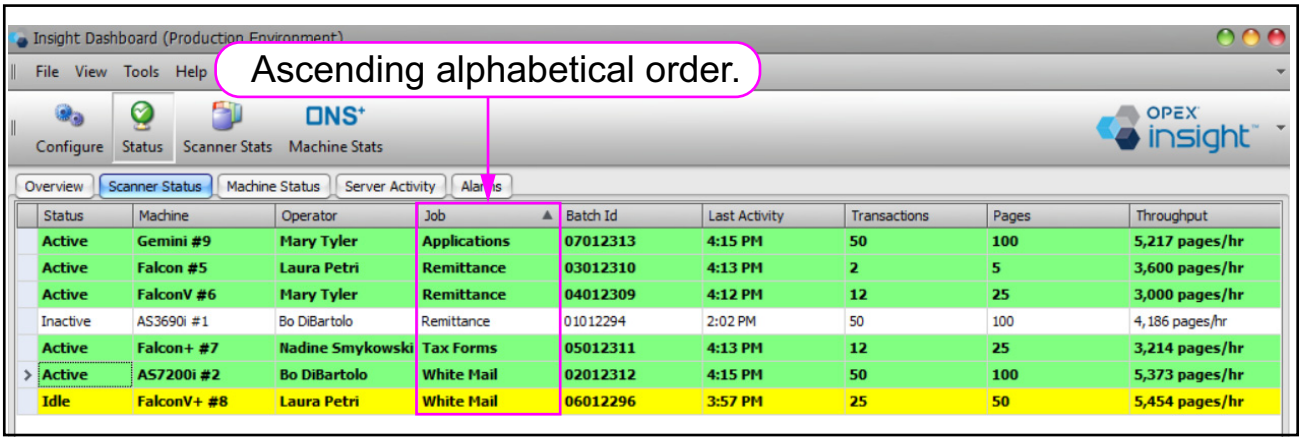


Figure 6-29: Table display after clicking `Sort Ascending`

2. Right-click the **Last Activity** heading and select `Sort Ascending` (Figure 6-30). This sorts the items for each job in ascending time order (Figure 6-31).

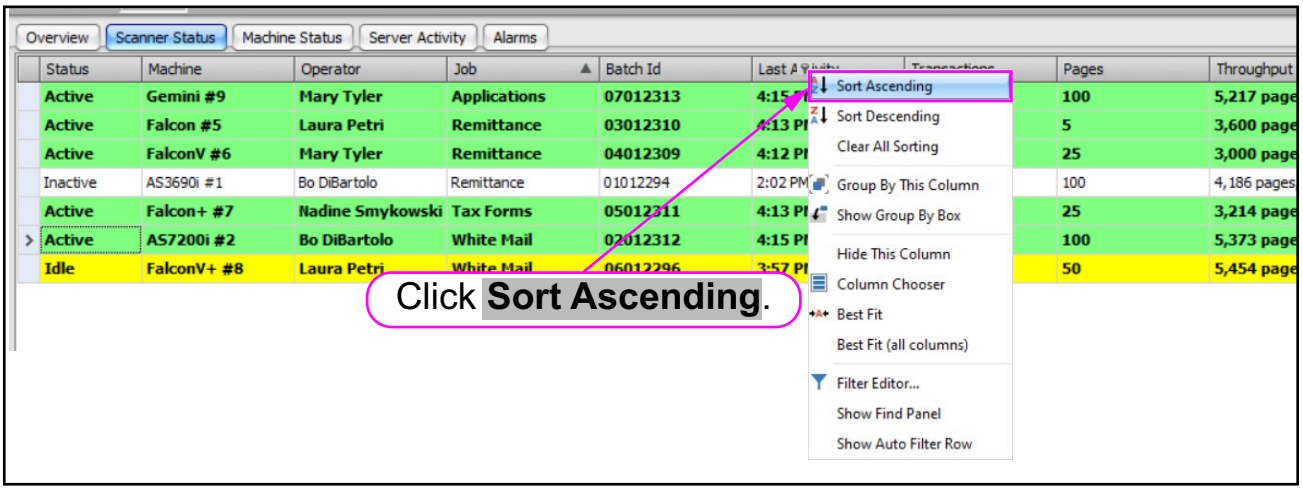


Figure 6-30: Sorting Last Activity in ascending order

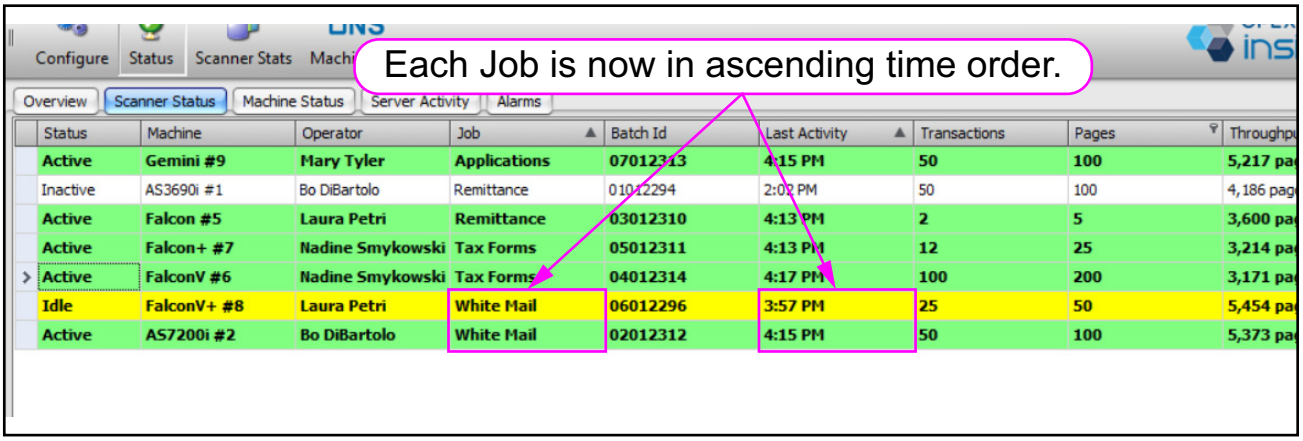


Figure 6-31: Result of sorting Last Activity in ascending order

3. Now, use `Clear Sorting` or `Clear All Sorting` as follows:
   a. Right-click on the **Last Activity** column and select `Clear Sorting`. The result is that the **Job** column is still in ascending order but the **Last Activity** column is no longer in ascending time order (Figure 6-32).

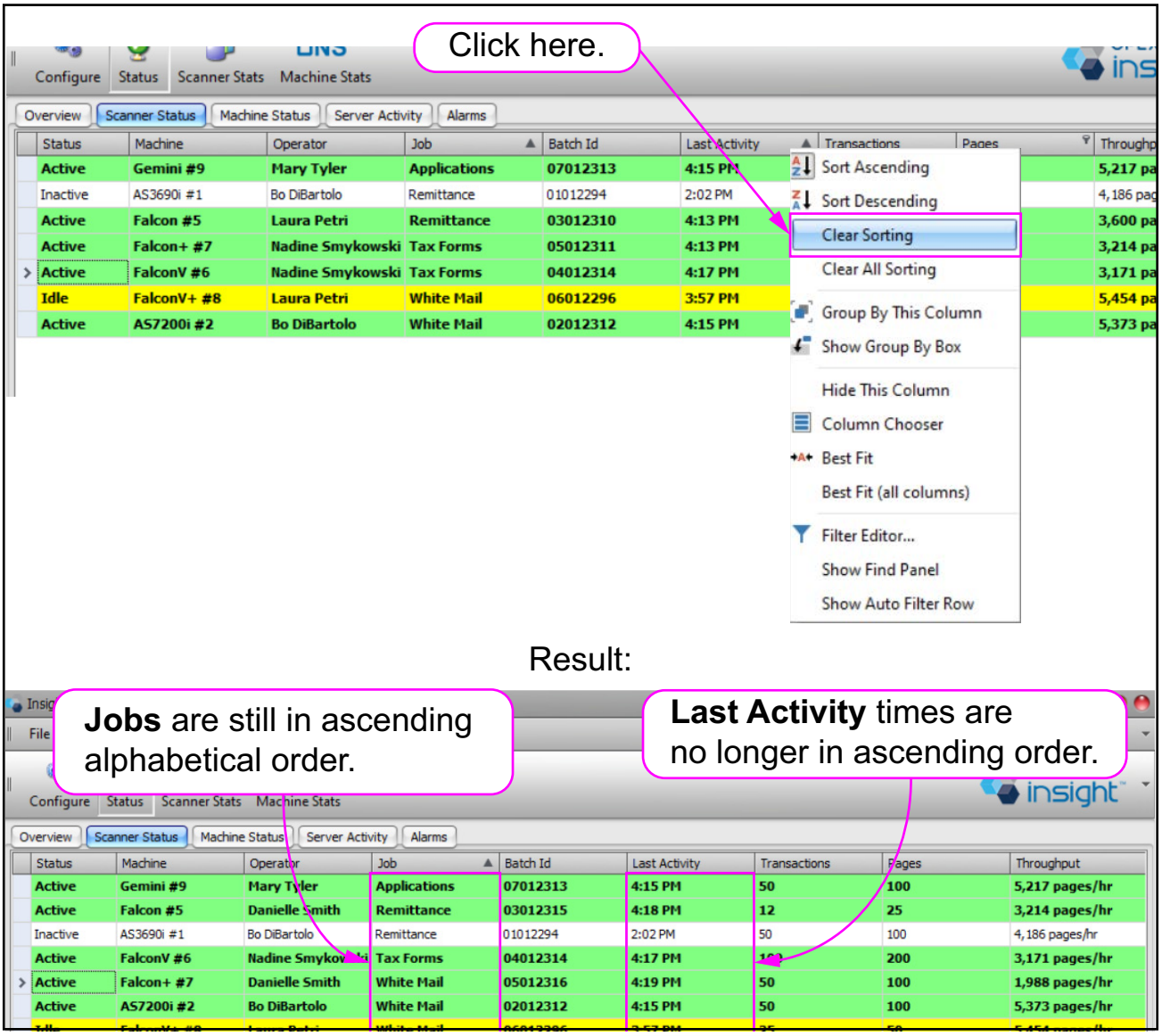


Figure 6-32: Result after selecting `Clear Sorting` in Last Activity

b. Alternatively, select **`Clear All Sorting`** in either column. The result is that sorting in both columns is cleared and the table goes back to the default display (Figure 6-33).

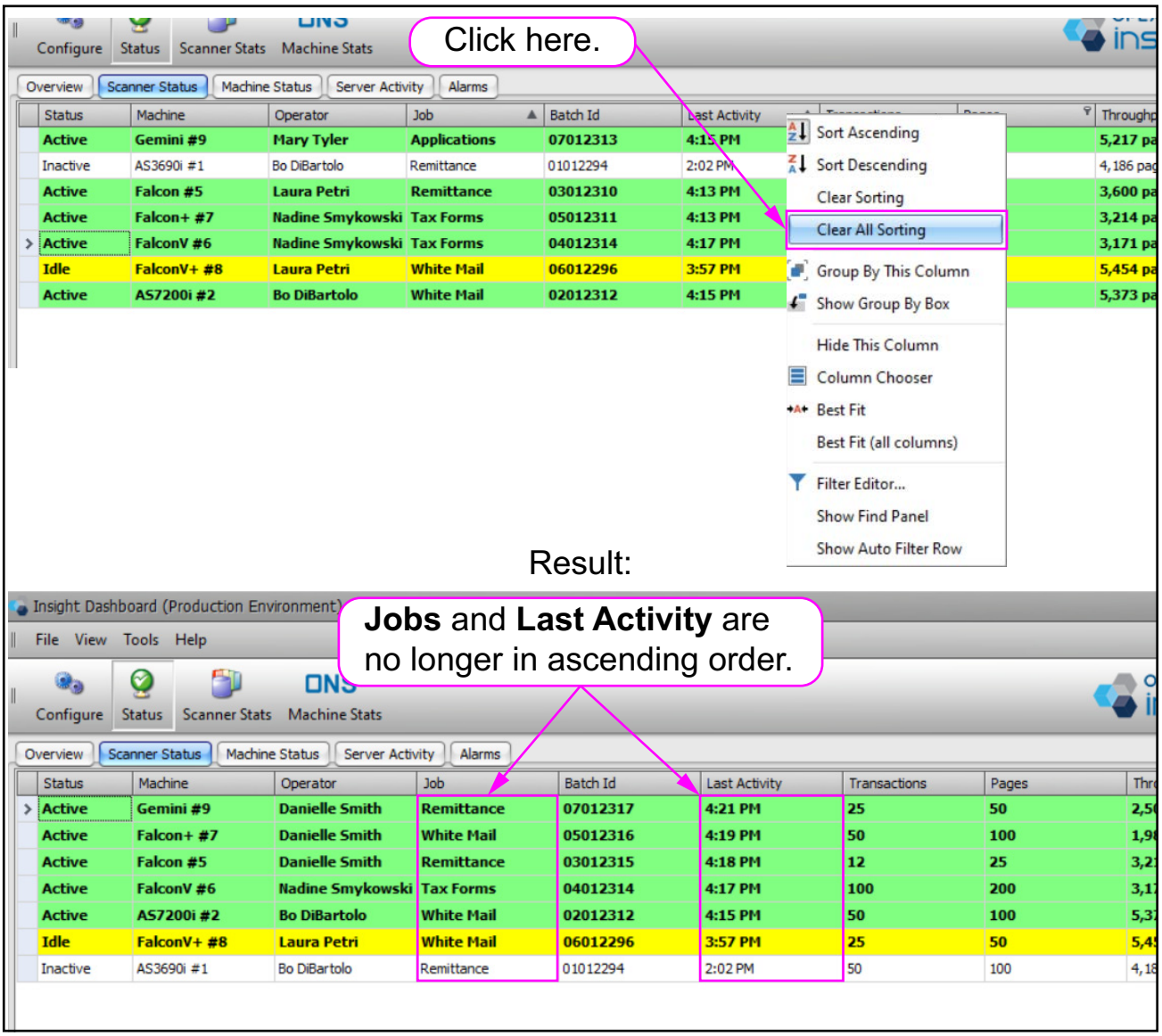
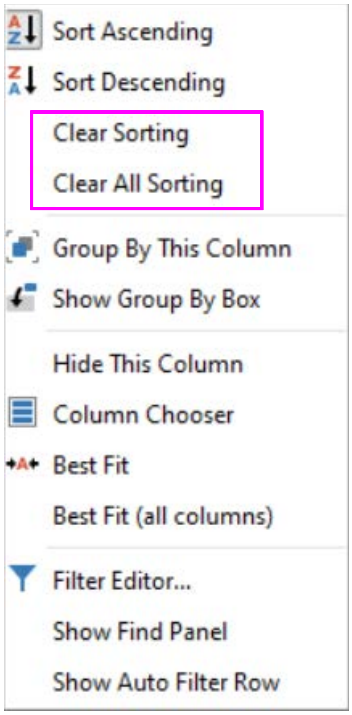


Figure 6-33: Result after selecting **`Clear All Sorting`**

Note: *After you select* `Sort Ascending` or `Sort Descending` *in the first column heading, the menu of that heading would include both* **Clear Sorting** *and* **Clear All Sorting**. *But the menu of an unsorted column heading would only contain* **Clear All Sorting** *(Figure 6-34).*

Column heading menu after sorting a column:



Column heading menu of an unsorted column:

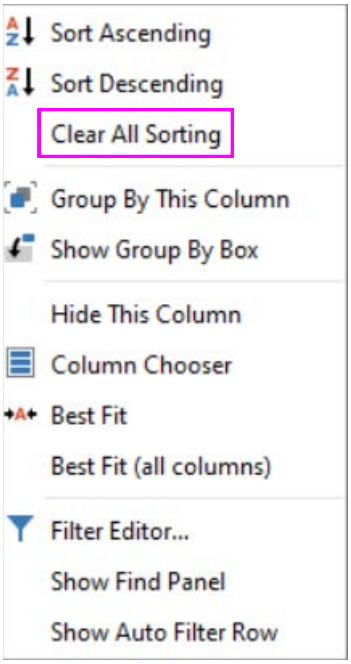


Figure 6-34: Menus of sorted and unsorted columns

6.7.3.3. Group By This Column

To group by a table column:

1. Right-click on any column heading and select `Show Group By Box` (Figure 6-35). This displays a **Group By** box into which you can drag a column by which you want to group the table (Figure 6-36).

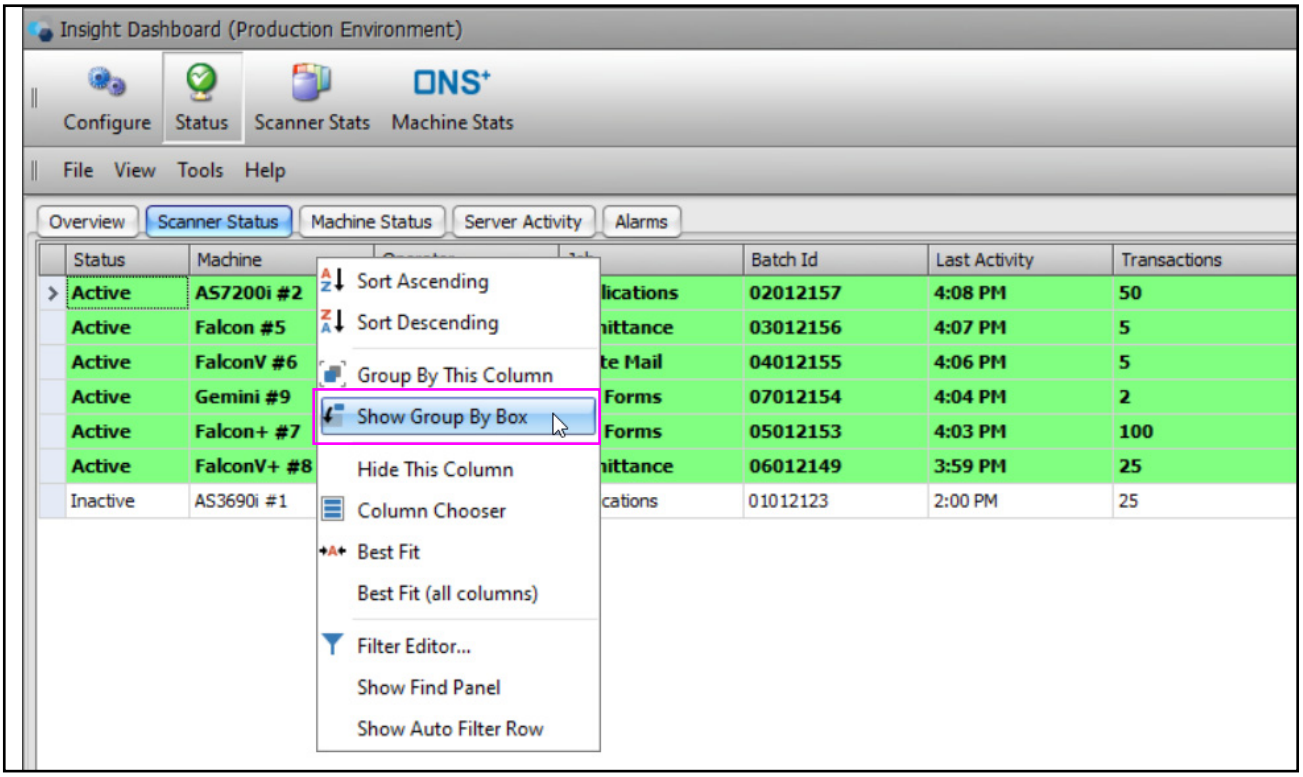


Figure 6-35: Showing the Group By box

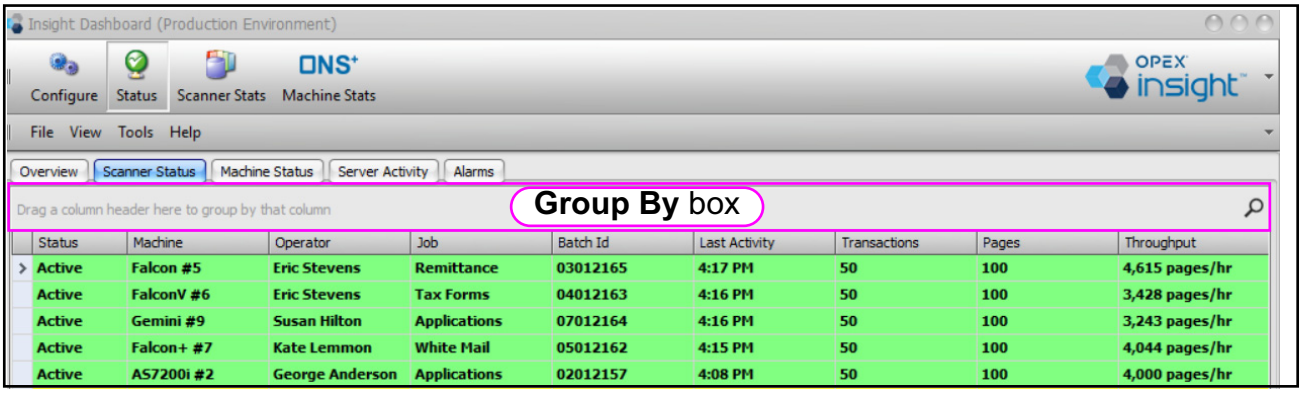


Figure 6-36: Result of clicking `Show Group By Box`

2. Drag the desired column heading into the **Group By** box. For example, Figure 6-37 shows the **Status** column after being dragged into the **Group By** box. The table rows are grouped based on the **Status** column.

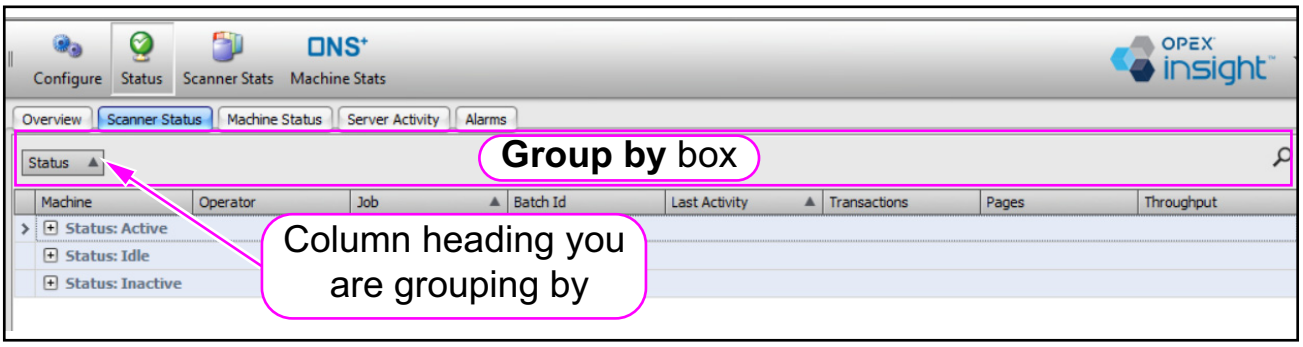


Figure 6-37: Result of dragging Status into Group By box

3. Expand or contract groups as desired (Figure 6-38).

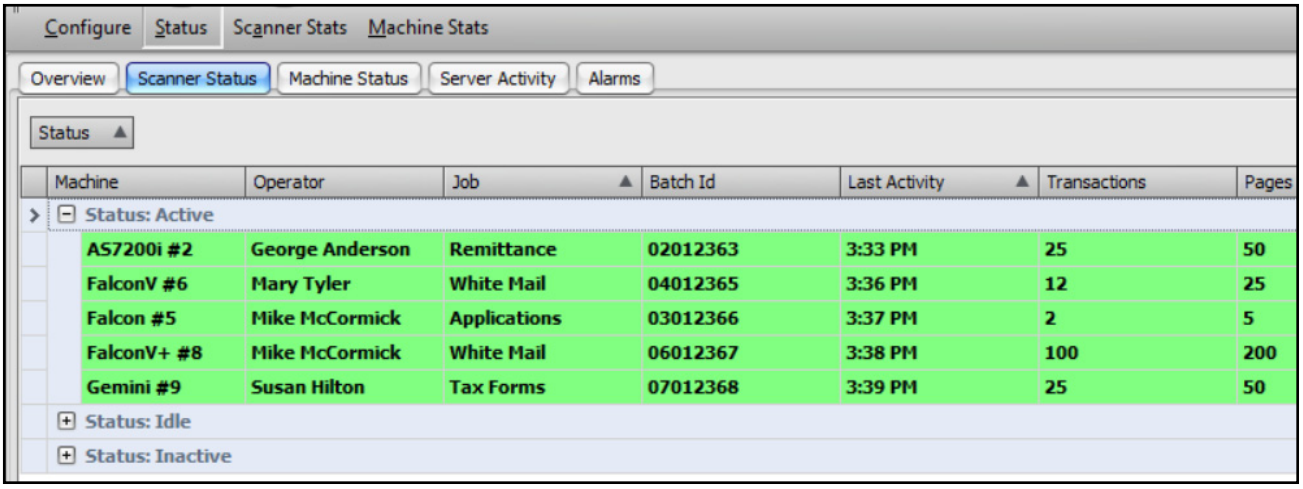


Figure 6-38: Expanding and contracting groups

4. To undo the grouping by the column, right-click on the column in the **Group By** box and select `Ungroup` (Figure 6-39).

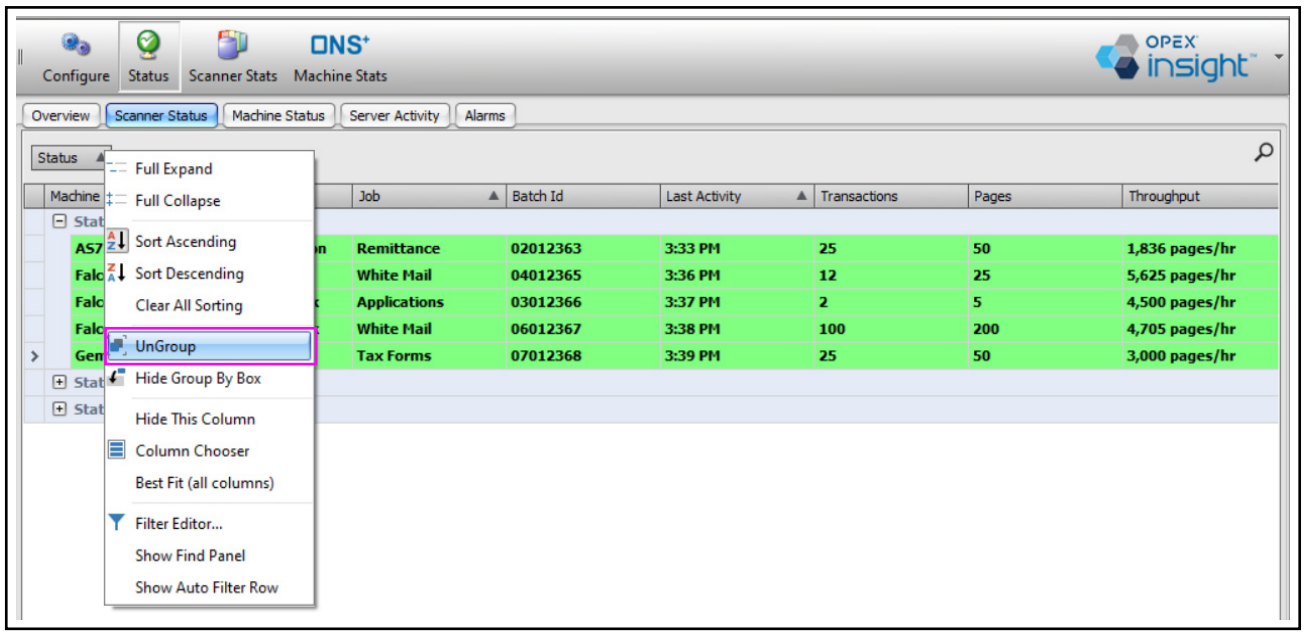


Figure 6-39: Selecting `Ungroup`

The result is that the table returns to normal. The empty **Group By** box remains displayed (Figure 6-40).

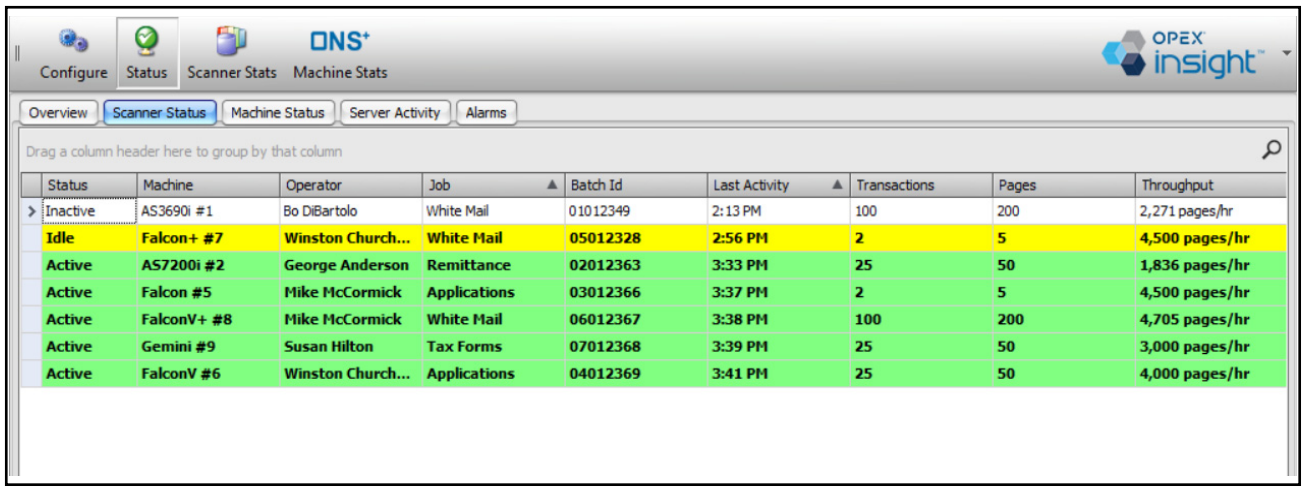


Figure 6-40: Result of selecting `Ungroup`

5. To hide the **Group By** box, right-click it and select `Hide Group By Box` (Figure 6-41).

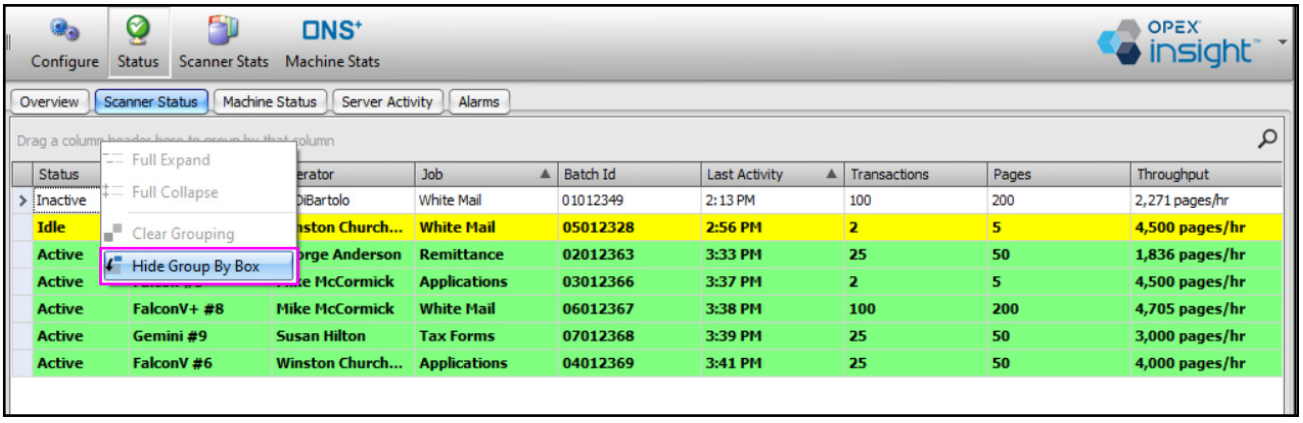


Figure 6-41: Hiding the Group By Box

The result is that the table returns completely to the default appearance (Figure 6-42).

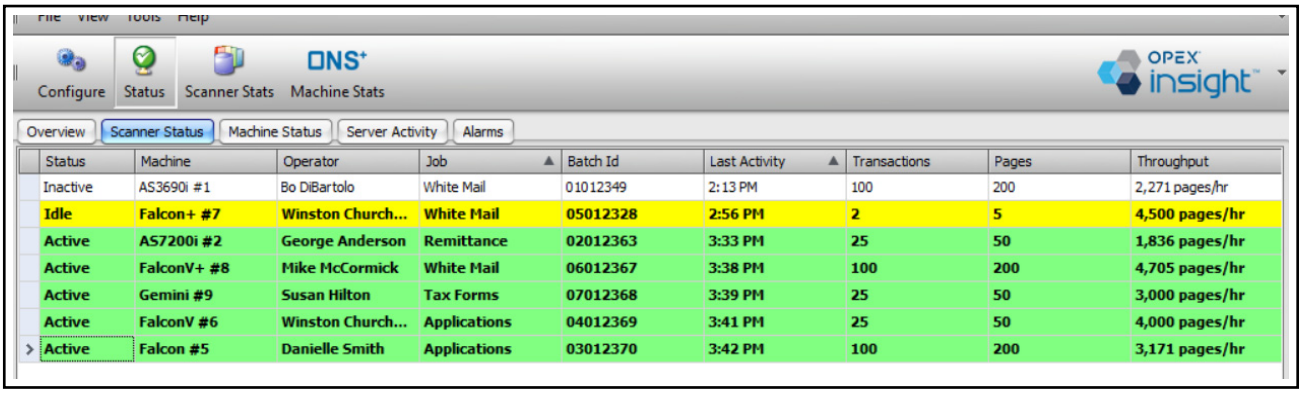


Figure 6-42: Result of selecting `Hide Group By Box`

You can also group by a column without showing the **Group By** box:

1. Right-click on the heading of the column by which you want to group the table.
2. Click `Group By This Column` (Figure 6-43). The result is that the rows are grouped based on the chosen column (Figure 6-44).

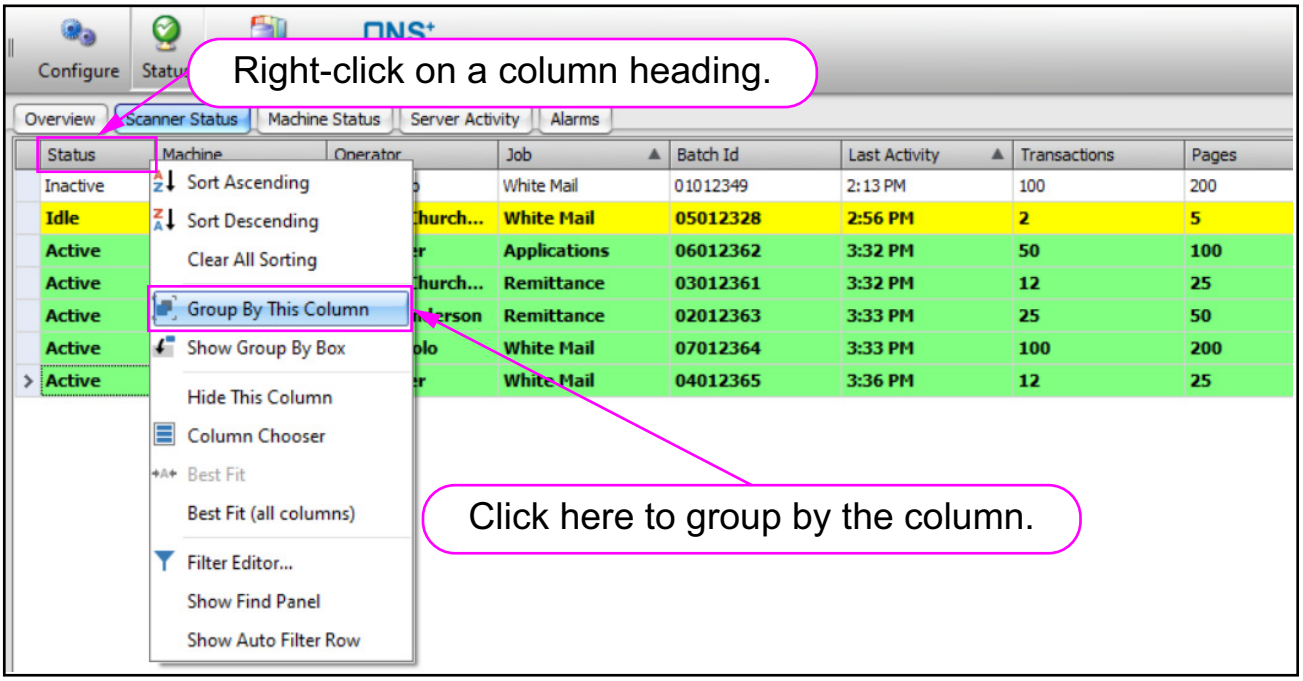


Figure 6-43: Clicking on `Group By This Column`

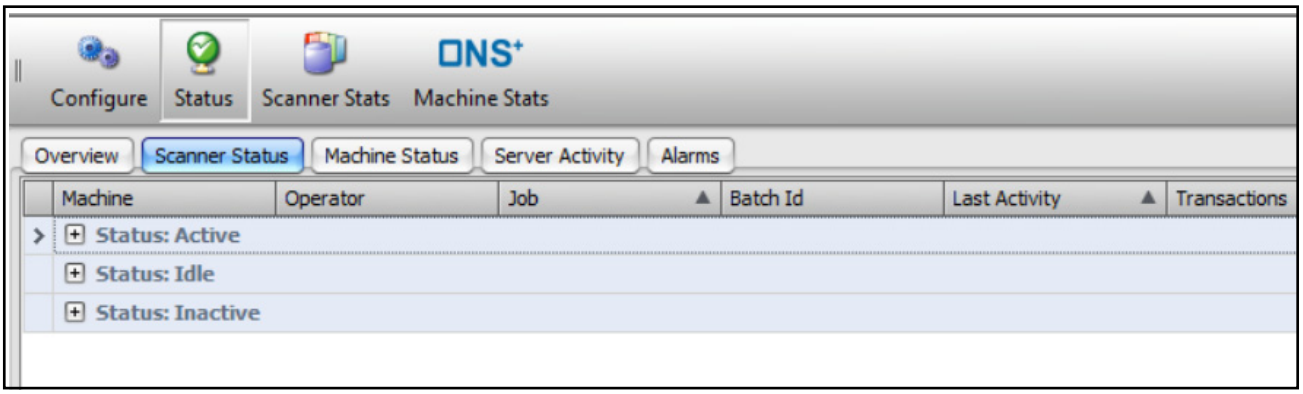


Figure 6-44: Result of clicking on `Group By This Column`

Note: *To undo the grouping by the column, you need to display the* **Group By** *box, as explained earlier.*

6.7.3.4. Hiding and Redisplaying a Table Column

1. Right-click on the heading of the column you want to hide.
2. Click **`Hide This Column`** (Figure 6-45). The selected column would be hidden from the table (Figure 6-46).

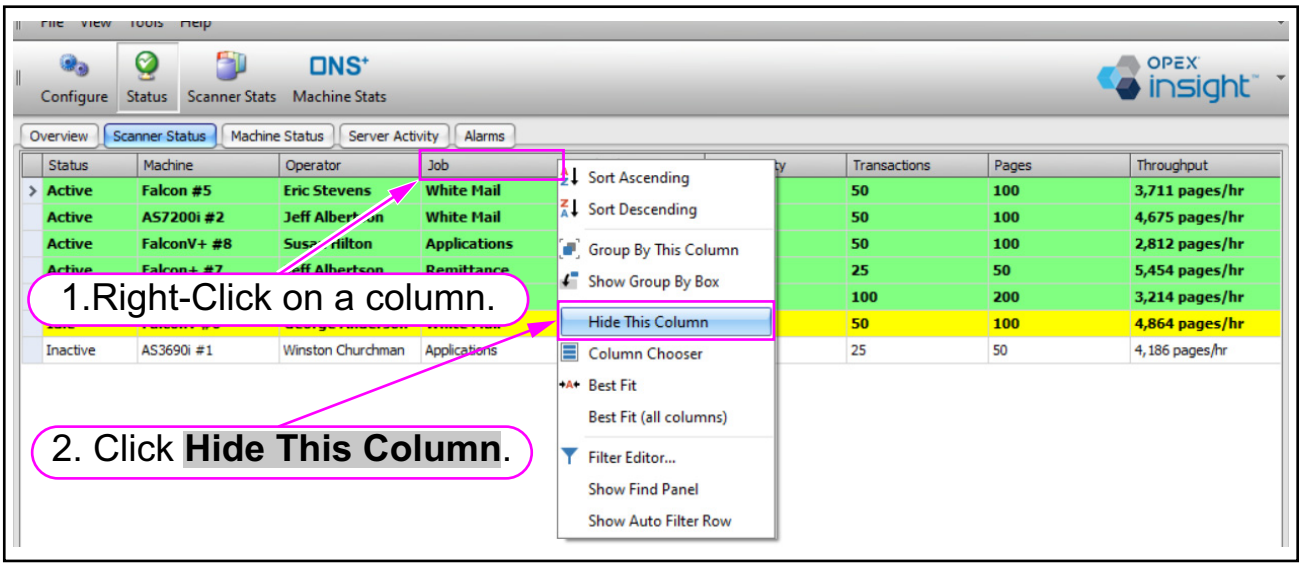


Figure 6-45: Hiding a column

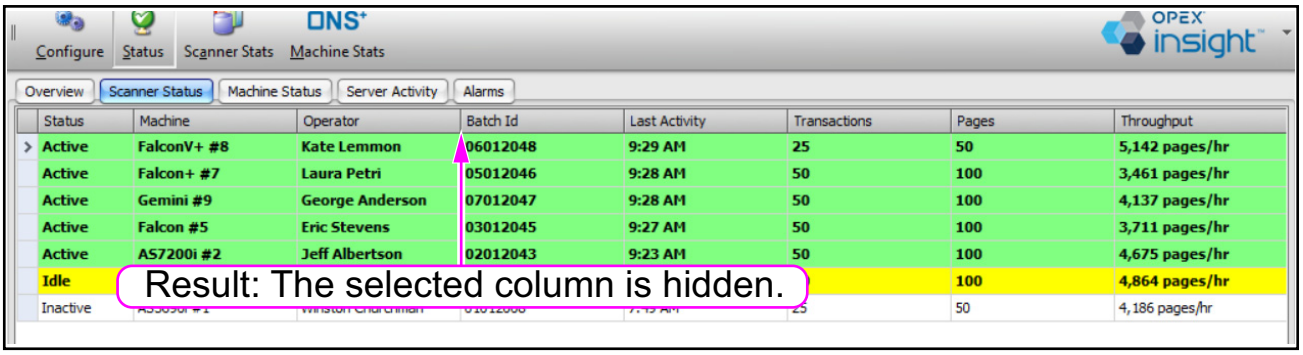


Figure 6-46: Result of hiding a column

3. To re-display the hidden column, right-click on the heading of any column and click **`Column Chooser`** (Figure 6-47). The **Column Chooser** panel is displayed, which lists hidden columns (Figure 6-48).

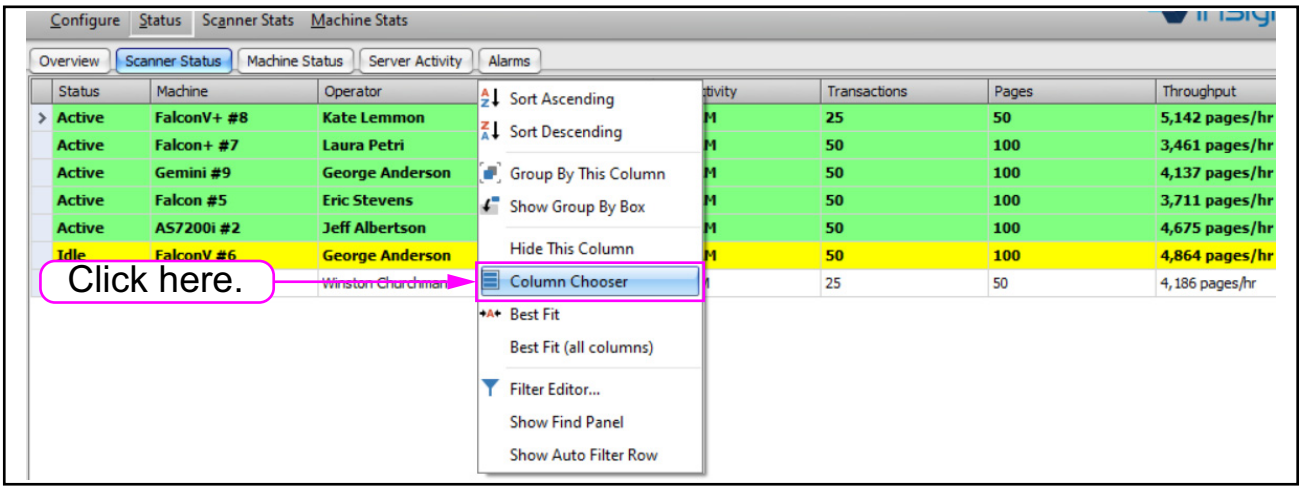


Figure 6-47: Displaying `Column Chooser`

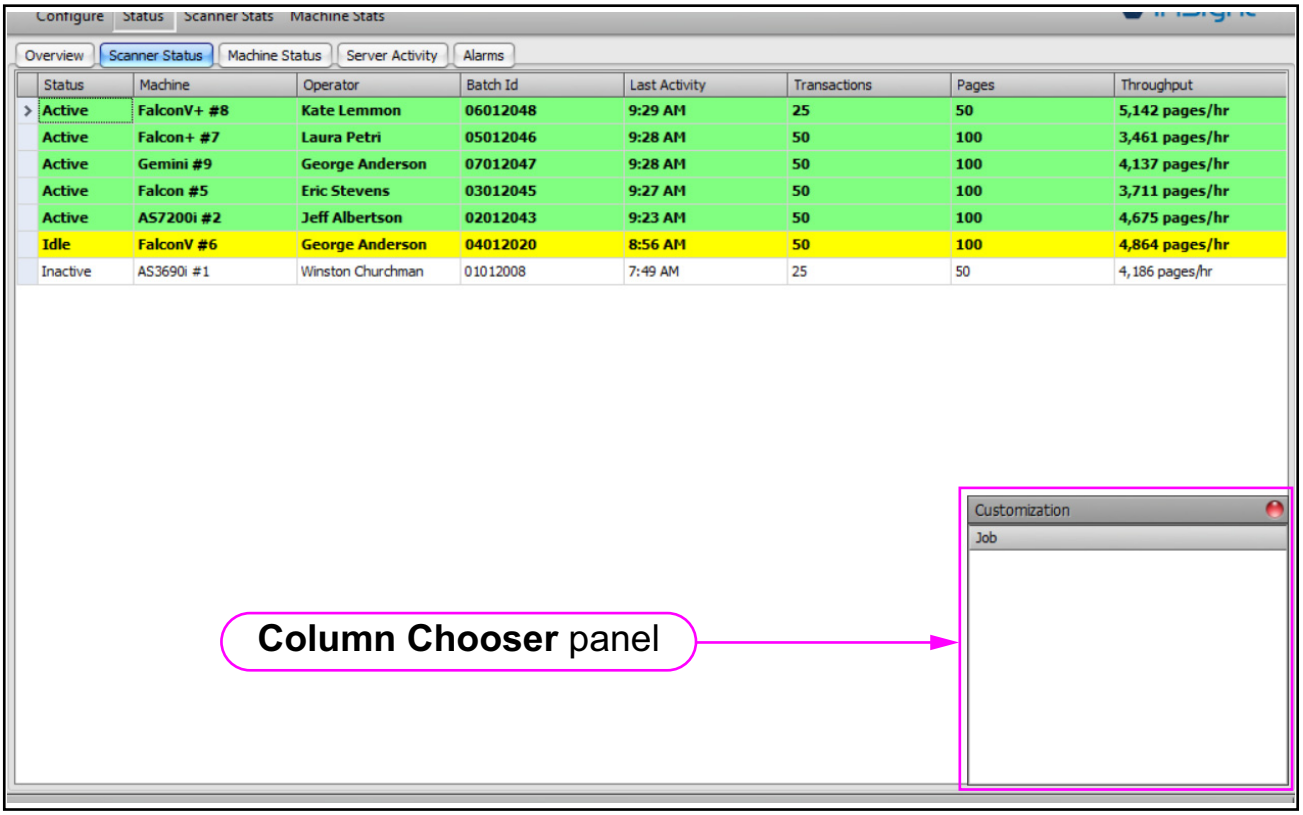


Figure 6-48: Column Chooser Panel

4. Drag the column heading from the **Column Chooser** panel to where you want the column to appear in the table. White guide arrows indicate where you can drop the column into the table (Figure 6-49 and Figure 6-50).

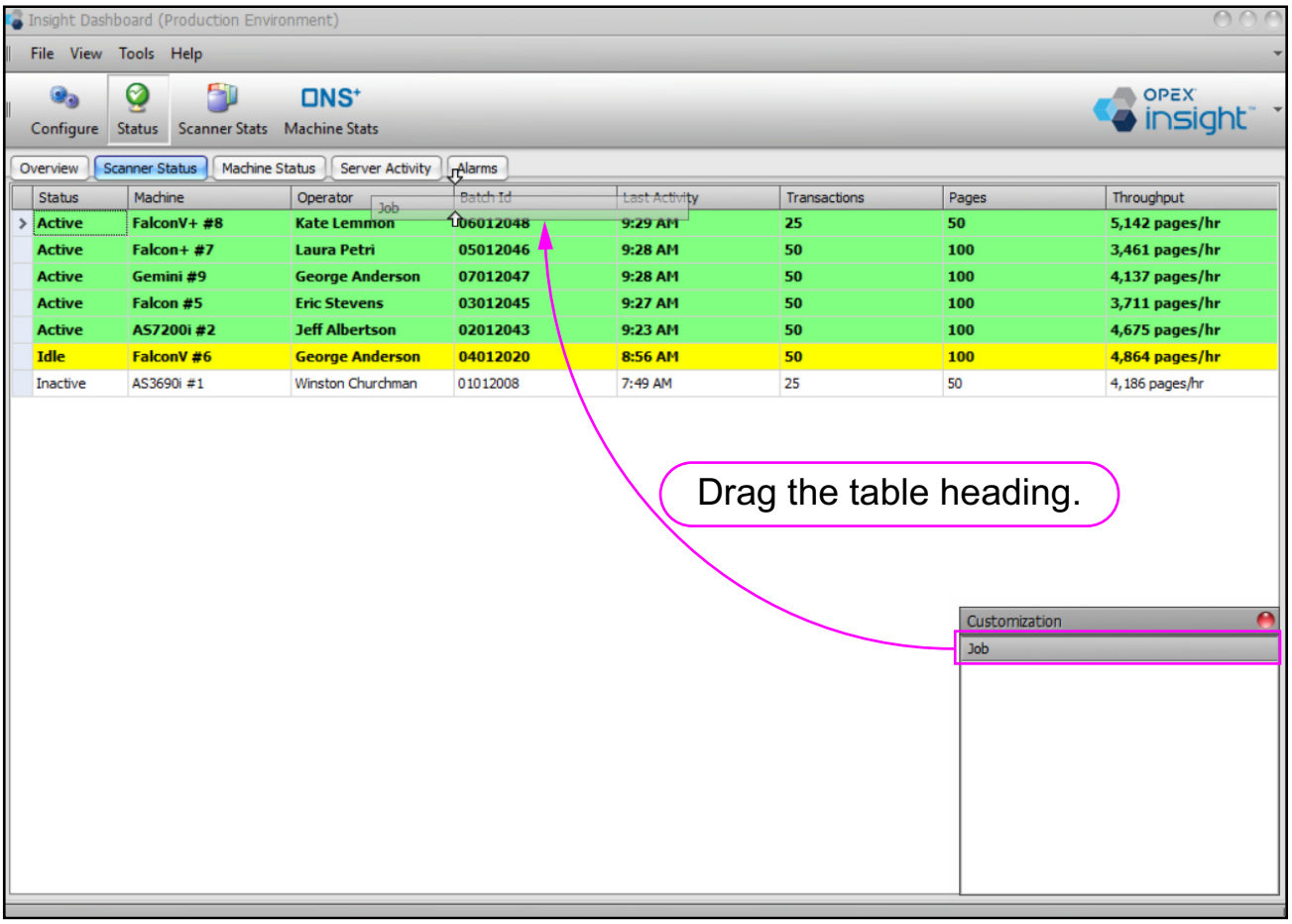


Figure 6-49: Dragging a column back to the table

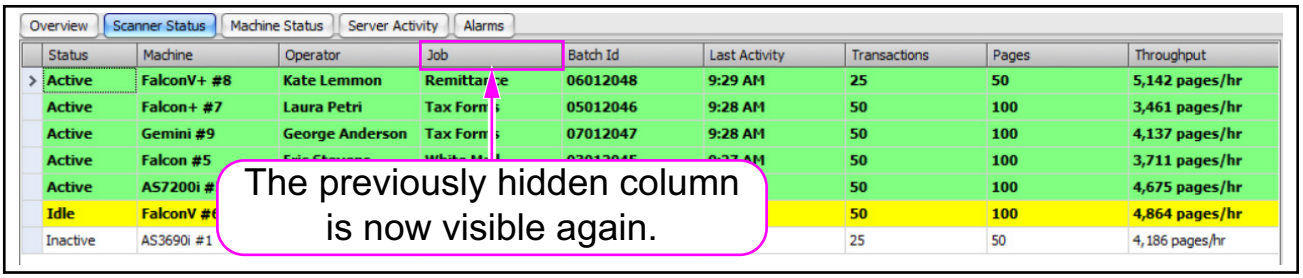


Figure 6-50: Result of dragging the column back

5. Optionally, you can hide a column by dragging its heading directly into the **Column Chooser** panel (Figure 6-51).

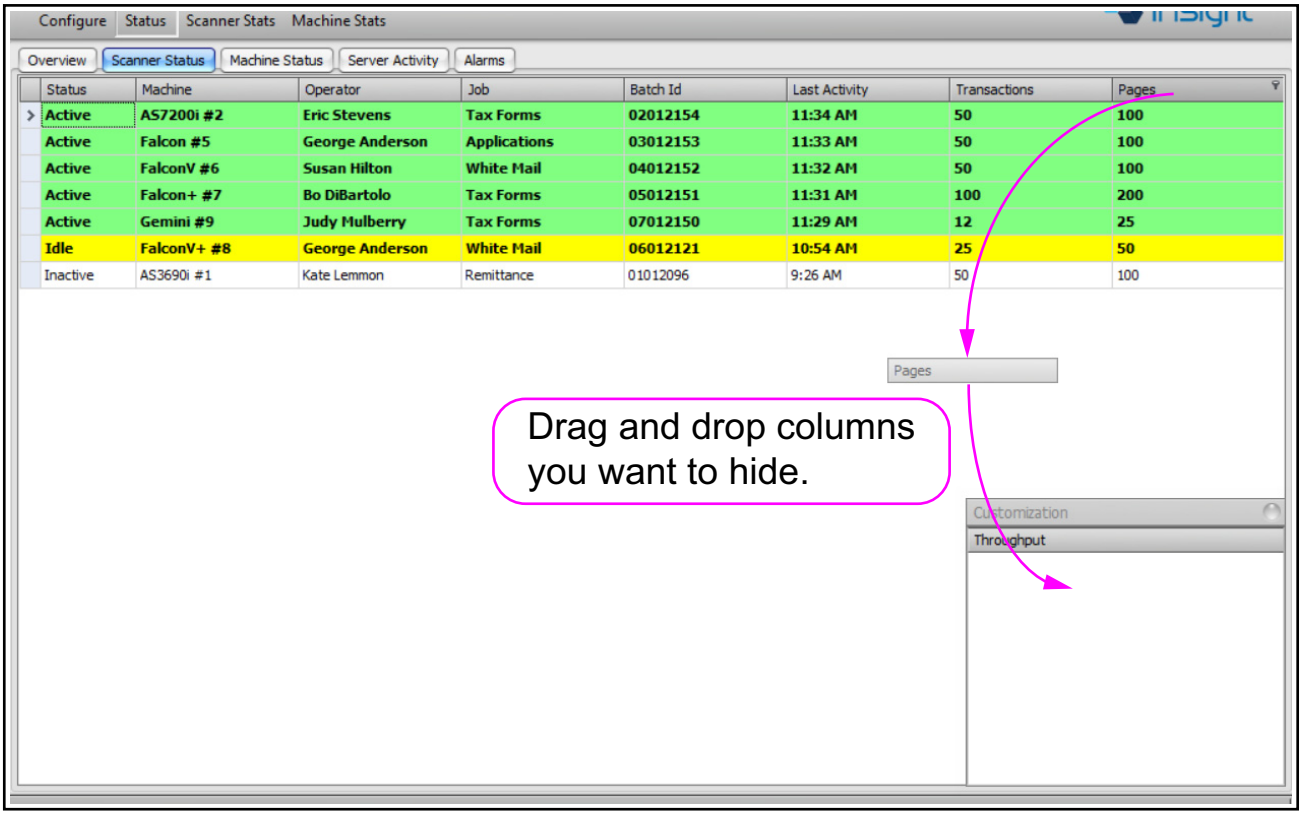


Figure 6-51: Using the Column Chooser Panel to hide a column

6. Close the **Column Chooser** panel when you are finished using it (Figure 6-52).

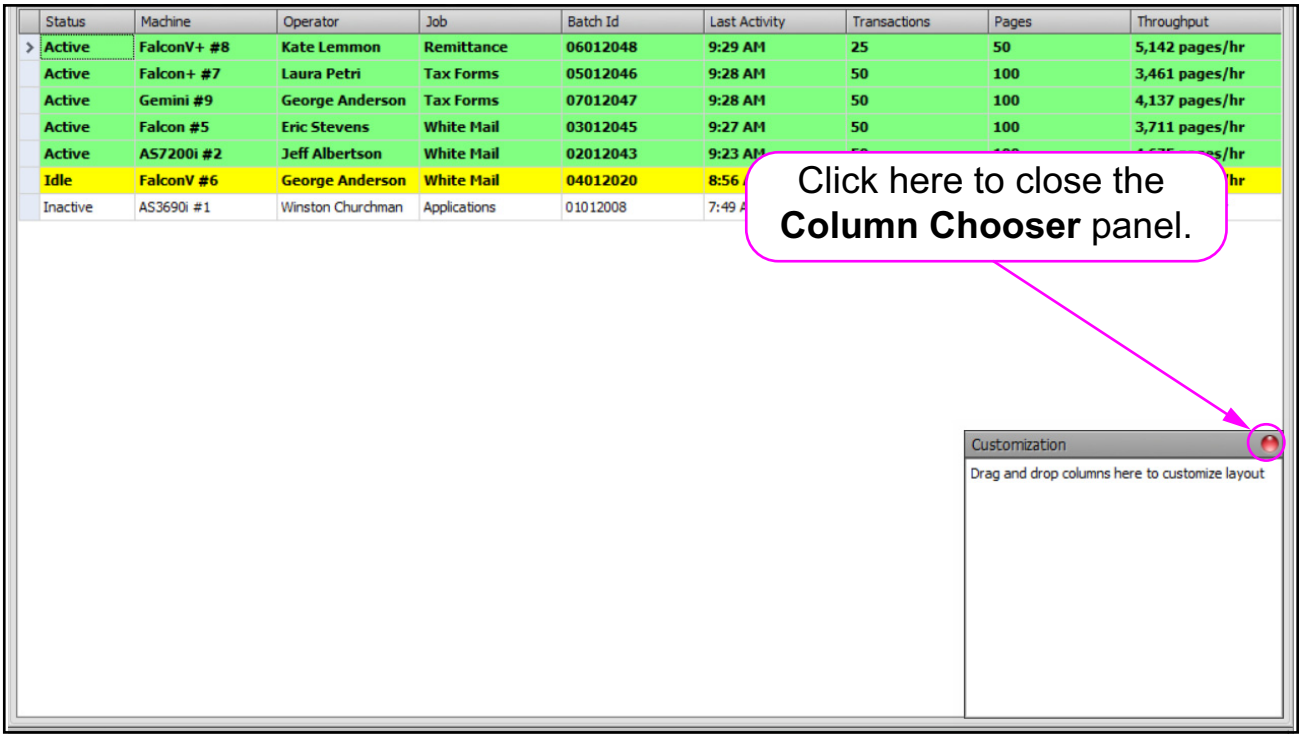


Figure 6-52: Closing the Column Chooser panel

6.7.3.5. Using Best Fit to Edit Column Width

To make as much text visible as possible, edit column width using one of these techniques:

- To edit the width of one column, right-click on the column heading and select **`Best Fit`** from the column heading menu (Figure 6-53).

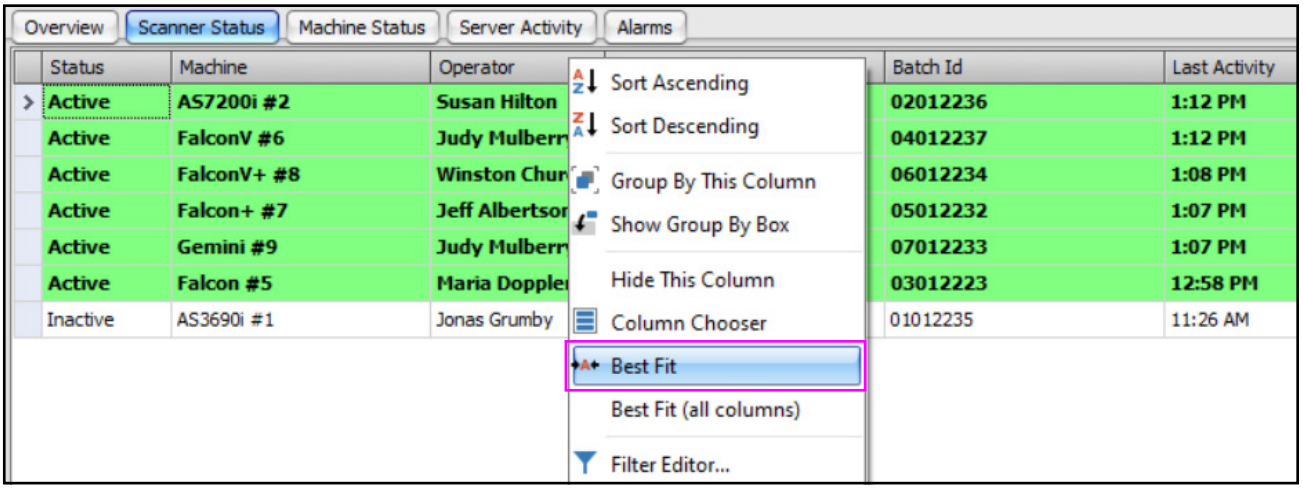


Figure 6-53: Selecting `Best Fit`

- To edit the width of all columns, right-click on any column heading and select **`Best Fit (all columns)`** (Figure 6-54).

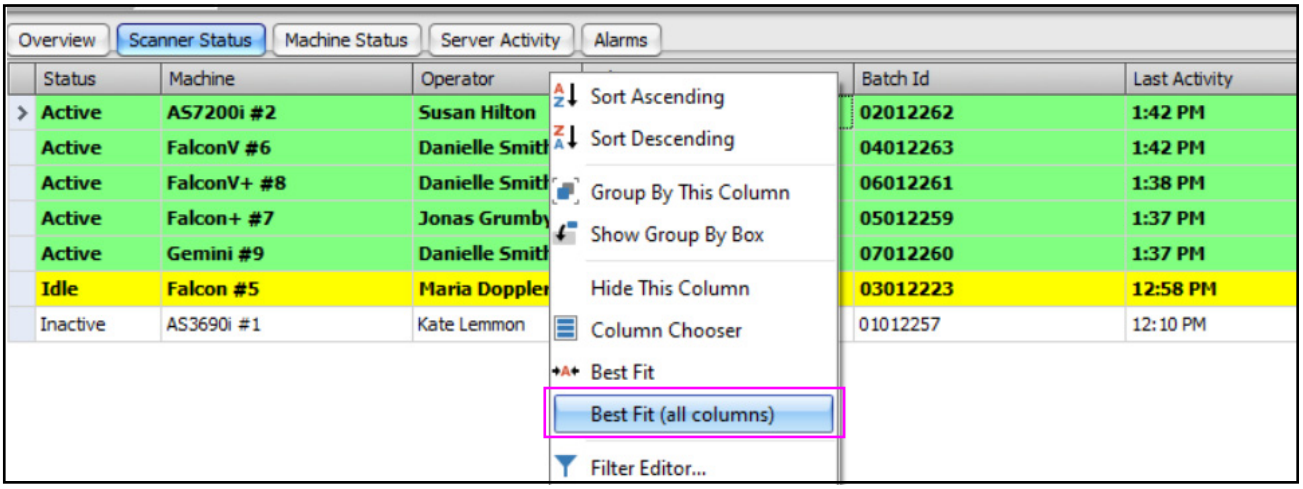


Figure 6-54: Selecting `Best Fit (all columns)`

6.7.3.6. Opening Filter Editor from the Column Heading Menu

You can open the **Filter Editor** by right-clicking on a table heading and selecting `Filter Editor` (Figure 6-55).

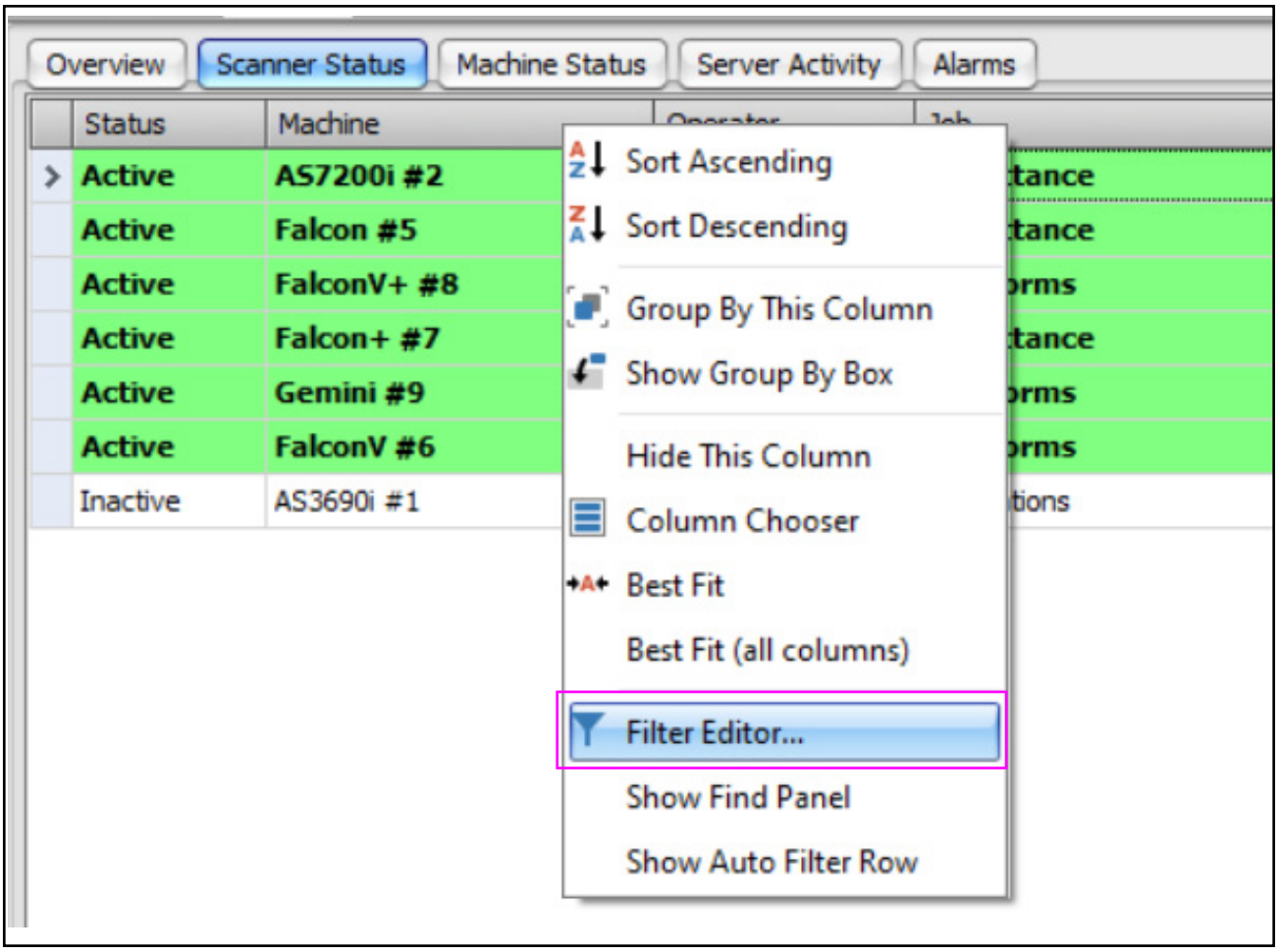


Figure 6-55: Opening Filter Editor from the column heading Menu

6.7.3.7. The Find Panel

You can perform a text search in a table.

1. Right-click on any column heading and select `Show Find Panel` (Figure 6-56). The **Find Panel** is displayed above the table (Figure 6-57).

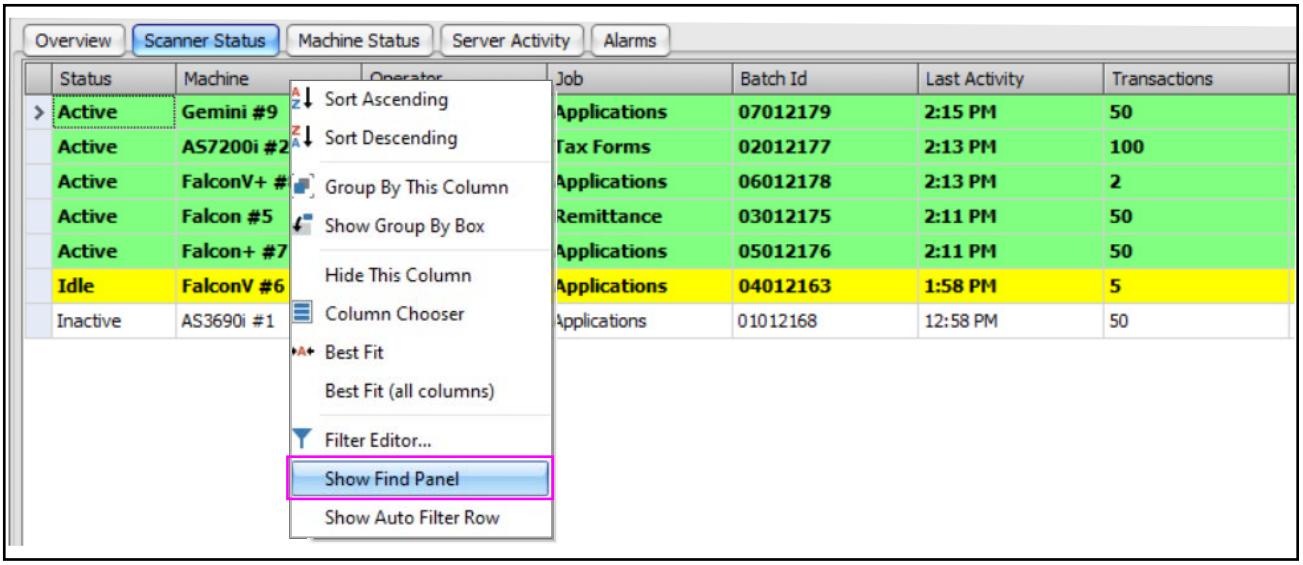


Figure 6-56: Clicking on `Show Find Panel`

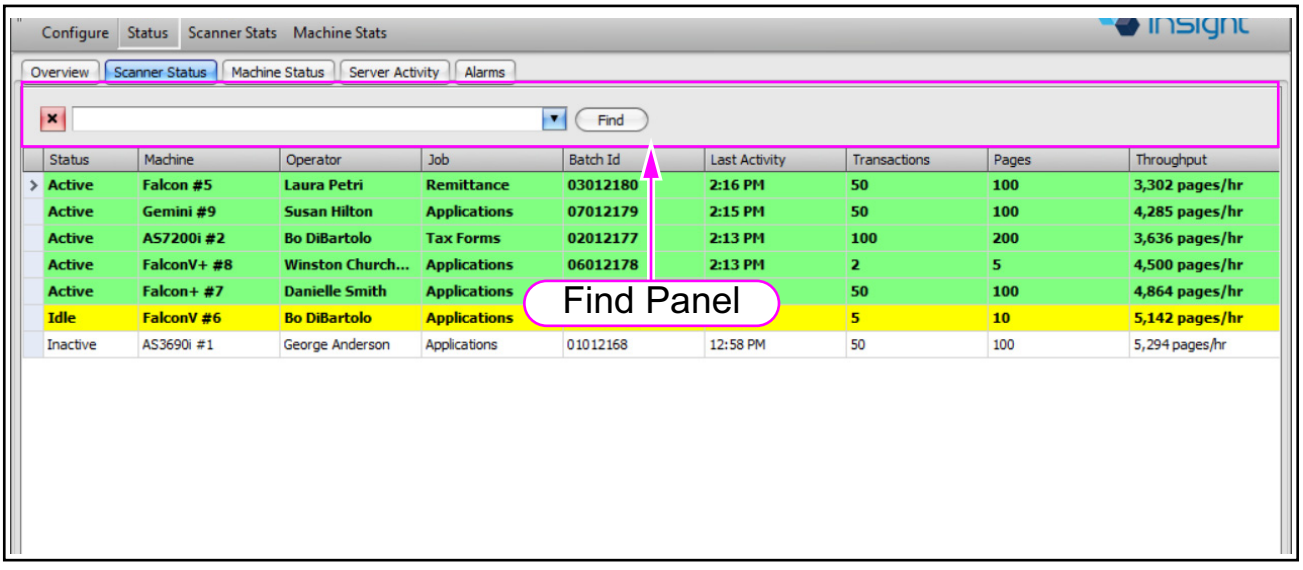


Figure 6-57: The Find Panel

2. To perform a text search, type the search text in the **Find Panel**. The rows with the search text are automatically displayed (Figure 6-58).

Note: *It is not necessary to click the* **Find** *button.*

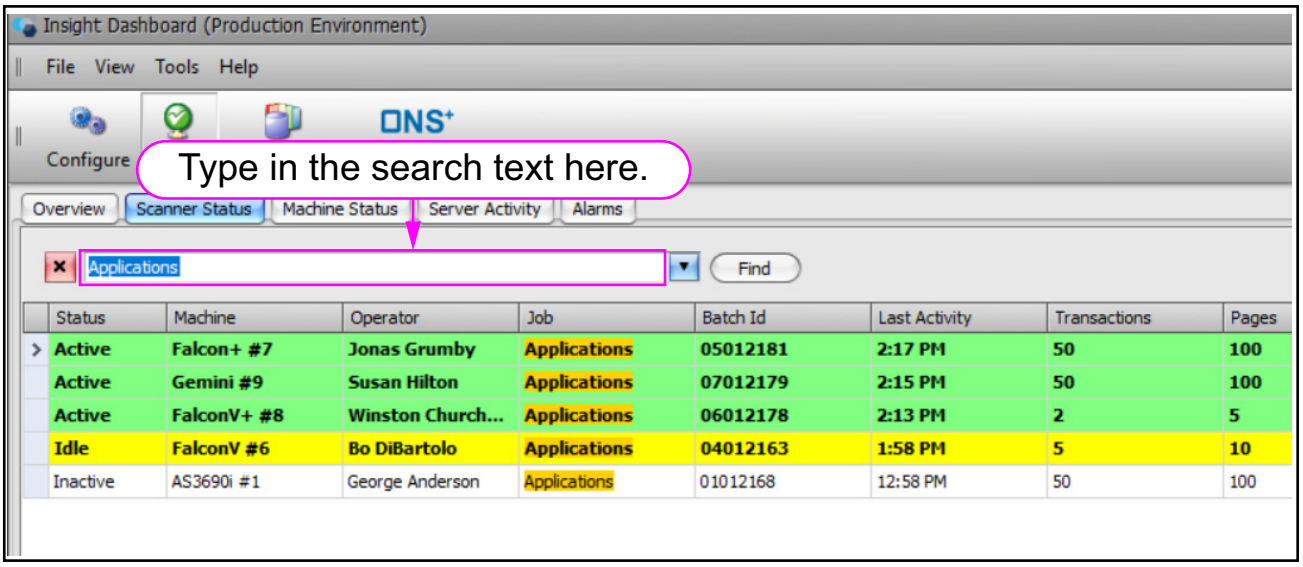


Figure 6-58: Performing a text search in a table

3. Close the **Find Panel** by clicking on the x at the left of the textbox (Figure 6-59).

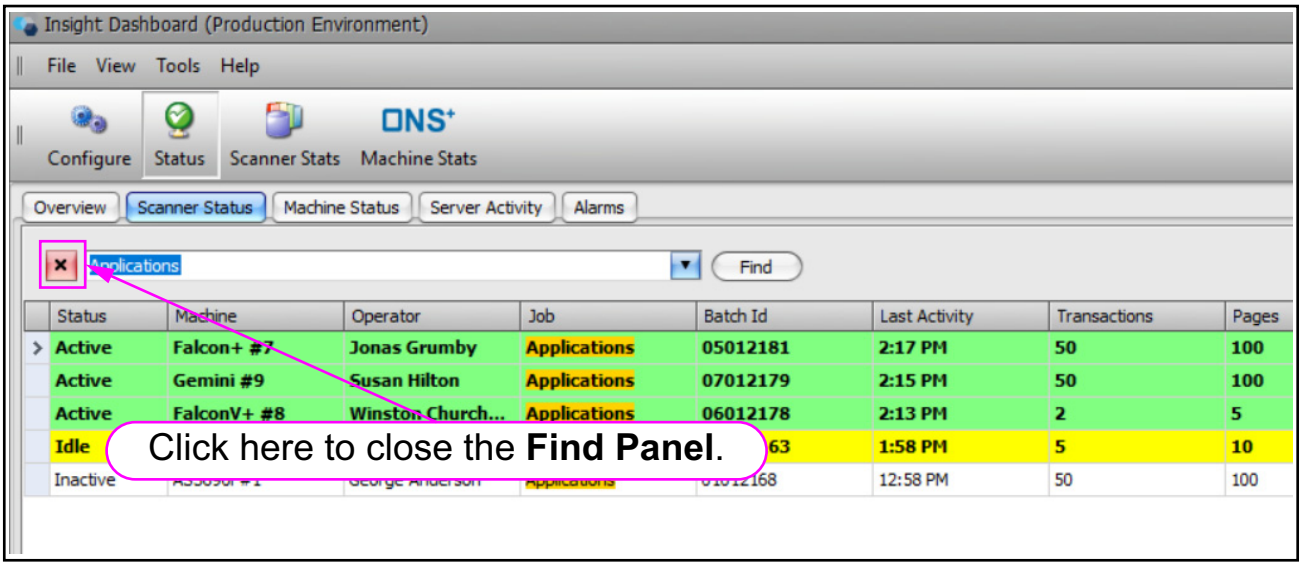


Figure 6-59: Closing the Find Panel

6.7.3.8. Show Auto Filter Row

The **Auto Filter Row** feature displays a row that makes more table filtering options available.

1. Right-click on a column heading and click on `Show Auto Filter Row` (Figure 6-60). The **Auto Filter Row** is displayed (Figure 6-61).

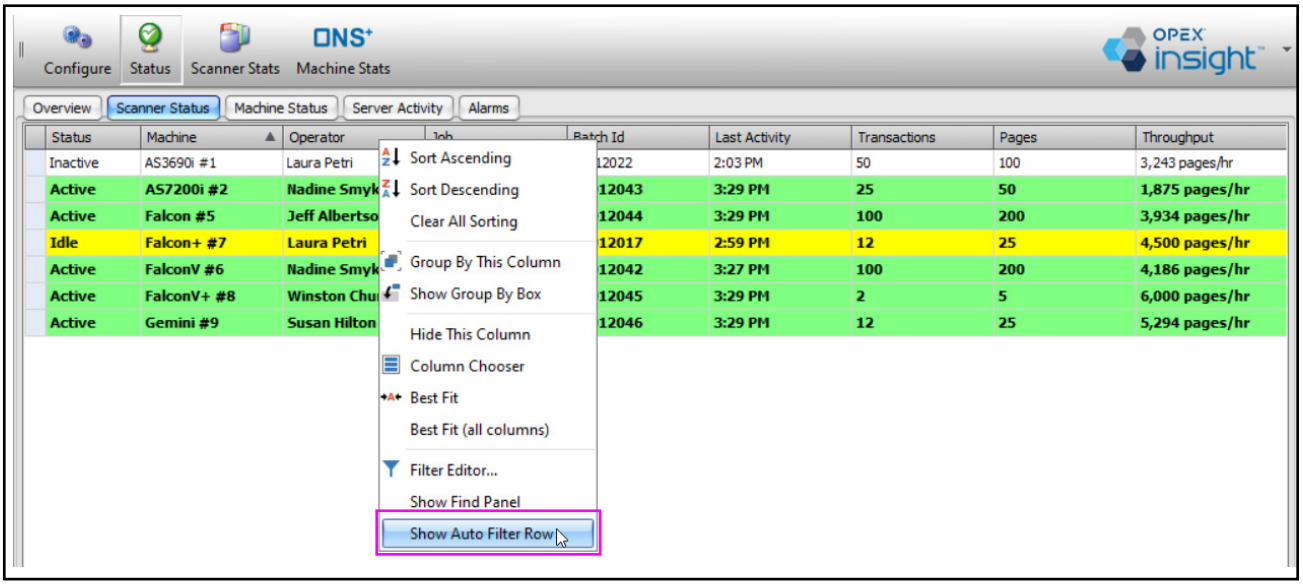


Figure 6-60: Clicking on `Show Auto Filter Row`

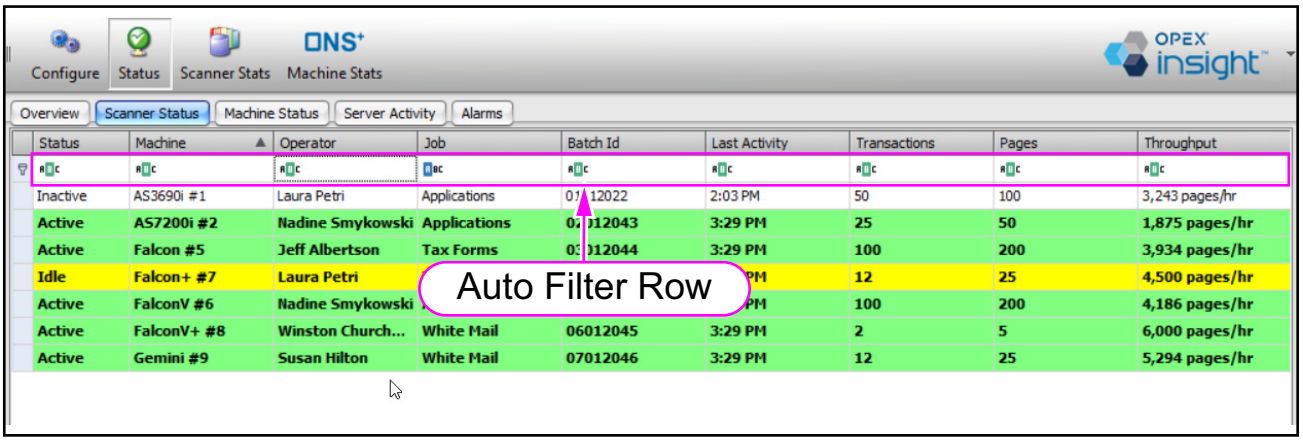


Figure 6-61: Display of the Auto Filter Row

2. In the **Auto Filter Row**, click on the desired column to display a list of additional filtering options (Figure 6-62).

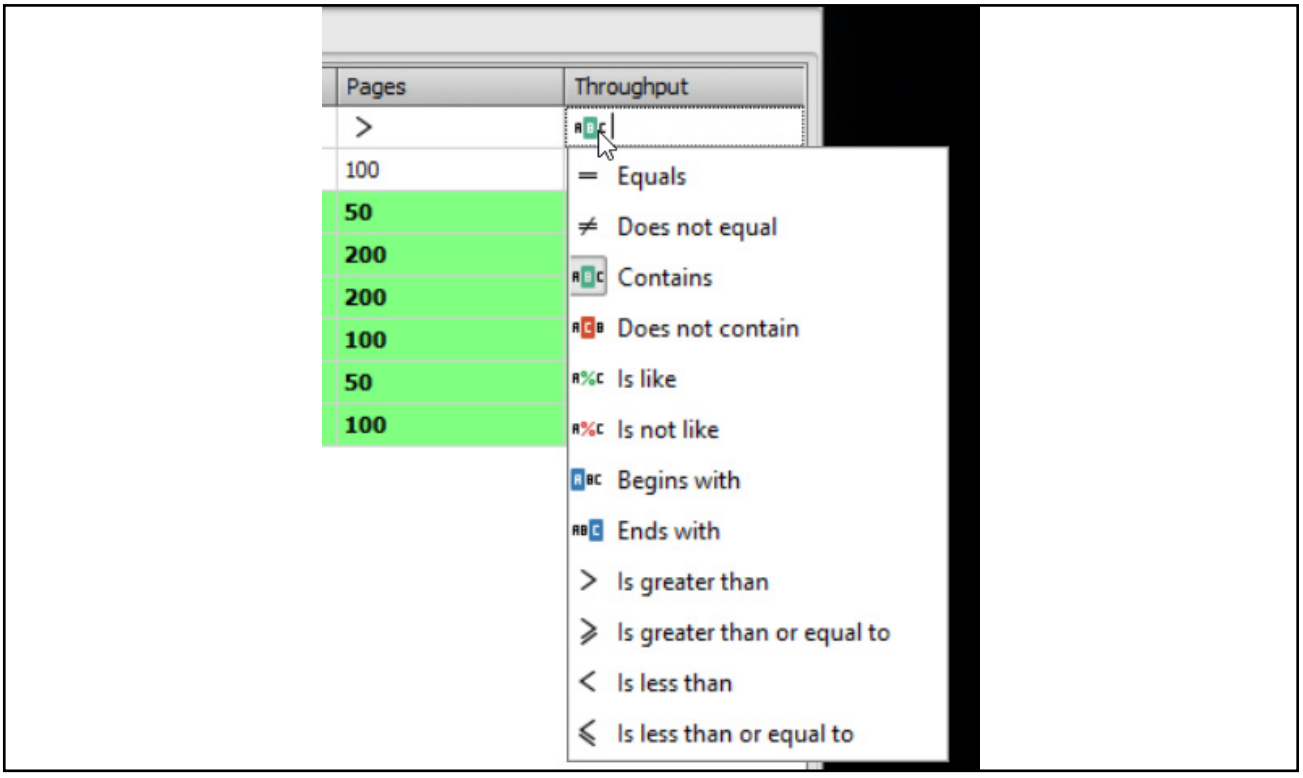
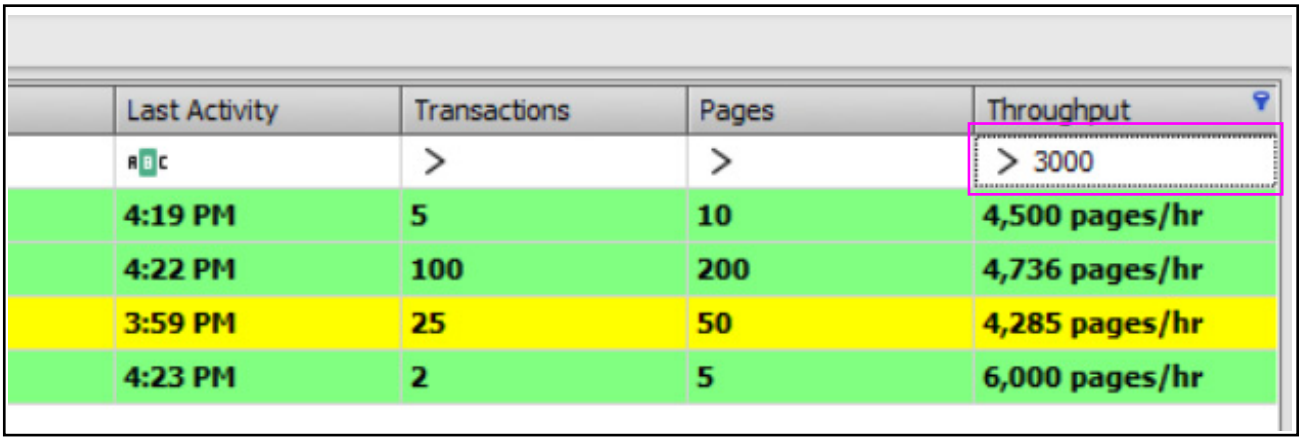


Figure 6-62: Clicking on the Auto Filter Row

3. Use one of the filtering options. For example, in the **Throughput** column, click on `>` and type `3000` for throughputs exceeding 3000 pages/hour (Figure 6-63).



Last Activity	Transactions	Pages	Throughput
	>	>	> 3000
4:19 PM	5	10	4,500 pages/hr
4:22 PM	100	200	4,736 pages/hr
3:59 PM	25	50	4,285 pages/hr
4:23 PM	2	5	6,000 pages/hr

Figure 6-63: Displaying rows of data for Throughput > 3000 pages/hour

4. To clear the filter setting, click on **`Clear Filter`** (Figure 6-64).

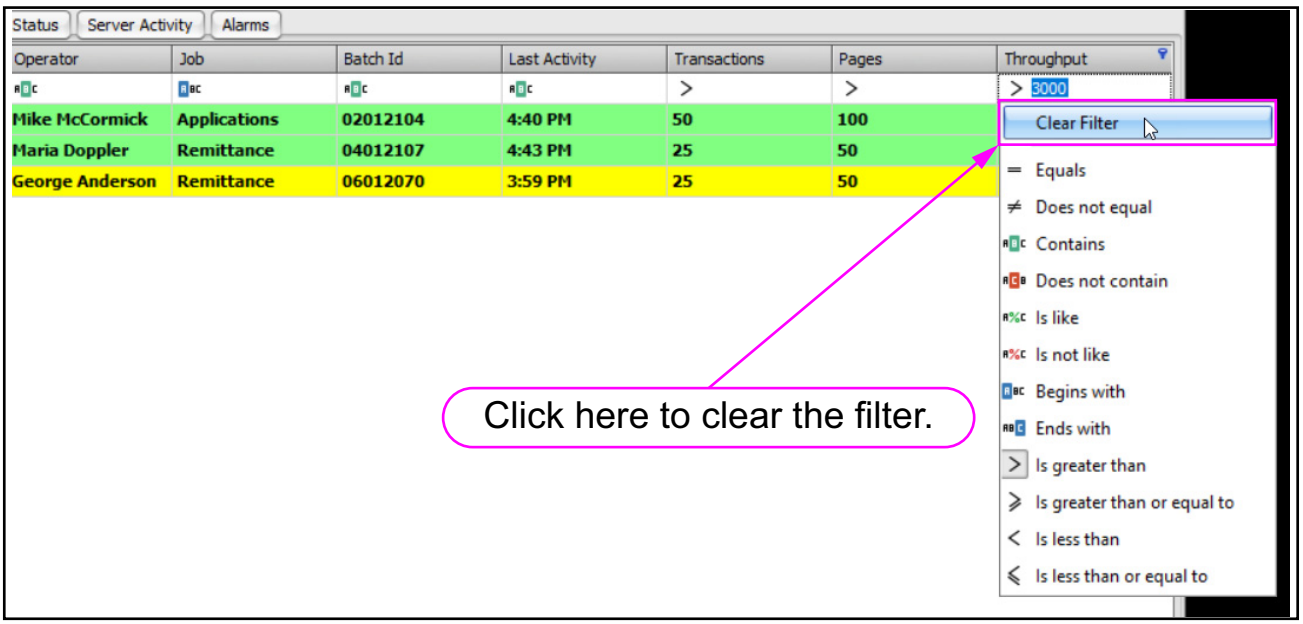


Figure 6-64: Clearing the filter setting

5. To hide the **Auto Filter Row** feature, right-click on a column heading and click on **`Hide Auto Filter Row`** (Figure 6-65).

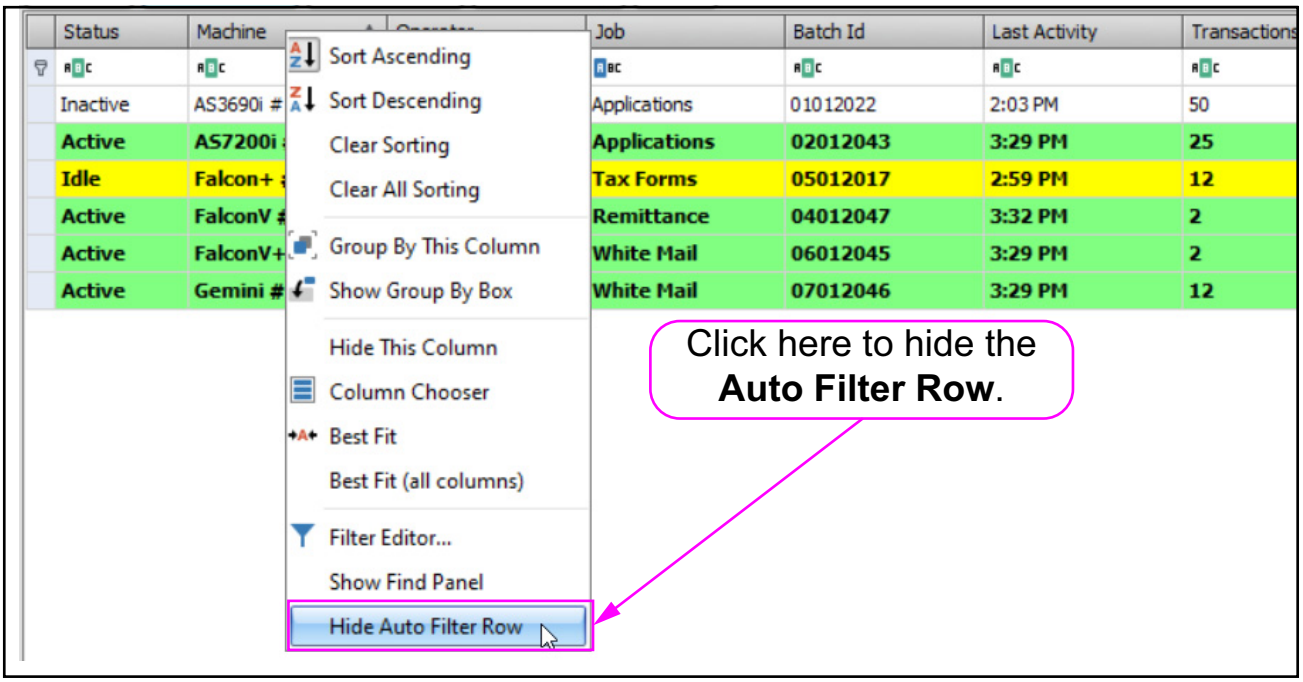


Figure 6-65: Hiding the Auto Filter Row feature

G. Glossary

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G.1. List of Acronyms

AD - Microsoft Active Directory (AD) is a service that stores network administration and security data (including user name and password information) in a centralized location designated by the Microsoft software. This allows user access to the various computers connected to the network to be managed from the central location rather than within each individual computer.

CSV - Comma-separated value.

IS Department - Information Systems (or Information Services) Department. A department responsible for computer, networking, and data management.

LAN - Local Area Network. A system for linking computers with each other in relatively close proximity (such as a building) in order to share data.

ONS - OPEX Network Solution

RED - Rapid Extraction Desk

XML - Extensible Markup Language

G.2. List of Terms

Capital Equipment - OPEX machines that are fully automated. Each of these machines has a built-in host computer which manages machine operation.

Host - Operator's main interface with a machine. The host computer software interfaces with the machine's controller to manage non-machine-related functions.

Manager - Person who creates operators and has access to most of the machine's controls and features.

Menu bar - Vertical series of menus on the left side of the screen. Use the Menu Bar to navigate through the various machine parameters and utilities.

Non-capital Equipment - OPEX machines that are semi-automated. These machines, called Rapid Extraction Desks, do not have built-in computers.

Operator - The person running the machine. Operators have limited access to machine controls and settings.

Run Time - Total time spent processing items. This does not include jam time or idle time between batches.

Scanning Equipment (Scanners) - OPEX machines that scan a wide variety of documents. Scanners have built-in host computers to manage machine operations.

Throughput - The volume per run time (Figure G-1). Throughput stats are based on information from the batch files.

$$\text{Thoughput} = \frac{\text{Volume}}{\text{Run Time}} = \frac{\text{Number of Scanned Items}}{\text{Run Time}}$$

in batches/hour, transactions/hour, or pages/hour.

Figure G-1: Throughput Mathematical Formula

Touch screen Monitor - Monitor or user interface that you touch to make your selections, without using a mouse or keyboard.

Wall Clock- Total time a scanner was running, including idle time (15 minutes or less) between batches and jam time.

Note: *The Insight Dashboard spells this as* **Wall Clock** *and* **Wallclock**.

Wall Clock Rate - Volume divided by wall clock (Figure G-2). Wall clock scanner stats are based on information from the batch files. If the time between the start time of one batch exceeds 15 minutes from the end time of the previous batch, it is considered a separate run.

$$\text{Wall Clock Rate} = \frac{\text{Volume}}{(\text{End time of last batch}) - (\text{Start time of first batch})}$$

$$= \frac{\text{Volume}}{\text{Wall Clock}}$$

in batches/hour, transactions/hour, or pages/hour.

Figure G-2: Wall Clock Rate Mathematical Formula

About OPEX Corporation

OPEX Corporation is more than a manufacturer of machines. We continuously re-imagine technology to power the future for our customers.

With an innovative approach, we engineer unique automated solutions that support our customers so they can solve the most pressing business challenges for both today and tomorrow. Our scalable Warehouse, Document, and Mail Automation solutions improve workflow, accelerate change, and drive efficiencies in infrastructure.

We are a family-owned and operated organization with more than 1600 committed employees who innovate, manufacture, install, and service products that are helping transform industry every day. We listen to our customers, respect each other, and work together to help reimagine the future through automated solutions.

At OPEX, we are Next Generation Automation.

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