**March 2025** 





#### **OPEX Insight<sup>™</sup> User Manual**

5067920UM-EN

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**Original Instructions** 



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# **Document History**

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20-01	Aug 20, 2020	Initial release
25-01	March 11, 2025	<ul> <li>Updated all previous chapters.</li> <li>Merged the Scanner Stats Module chapter with the Machine Stats Module chapter.</li> </ul>

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# **OPEX Insight**<sup>™</sup>

**User Manual** 

### 1.1. Overview

OPEX® Insight<sup>™</sup> 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).

L	og in to MavBridge Dashboard 🔴
	MAVRO
	IMAGING
	Enter your login information:
	Username:
	Password:
	Always connect as this user
	< Advanced Log in Cancel

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.

Insight Dasht File View	ooard (Production E Tools Help	nvironment)						00
Configure	Status Scanner Sta	ts Machine Stats	(	Insight	t Dashbo	ard mod	ules	
Server Status	2 ng nor 3 o Uptime: 05:04 y Usage: 26,560 K	duction E	vity Alarms					
canner Activity	1	1				1		
Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throughput
Active	Falcon+ #7	Jeff Albertson	White Mail	05012139	1:07 PM	12	25	3,600 pages/hr
Active	FalconV+ #8	Mary Tyler	Remittance	06012140	1:07 PM	2	5	4,500 pages/hr
Active	FalconV #6	George Anderson	Remittance	04012138	1:06 PM	50	100	1,945 pages/hr
Active	AS72001 #2	Judy Mulberry	Remittance	02012137	1:04 PM	5	10	3,000 pages/hr
Active	Gemini #9	Winston Church	Applications	07012136	1:03 PM	50	100	2,666 pages/hr
Active	Falcon #5	Judy Mulberry	White Mail	03012127	12:55 PM	5	10	6,000 pages/hr
erver Alarms	Level	Event					Ad	mowledged By Ack
Time	Level	Lven					40	diowiedged by Ack
								Connected (Adr

Figure 1-4: Insight Module Buttons

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# 2. Configure Module

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<b>2.2. Connection Settings Tab</b> 2.2.1. Server Connection Area 2.2.2. Login Information Area 2.2.3. Automatic Login Area.	a	· · · · · · · · · · · · · · · · · · ·	 	••••••••••••••••••••••••••••••••••••••	<b>}</b> ) ) 3
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# **OPEX Insight**<sup>™</sup>

**User Manual** 

# 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.

Inspit Dashboard     Ore     Configure Module Tab     Configure States Scener States Machine States	
Connecton Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs Server Connecton Server Name or IP Address (1) = (2) (3) (4) (5) (6)	
Login Information You are currently connected as user Admin.	
Automatic Login is turned off: Dashboard will ask for a username and password when starting.	
Turn Off Automatic Login	
Reload Server Configuration Save Changes Connected (Admin)	

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

Insight Dashboard     Insight View Tools Help     I. Click Config	ure.
Configure Status Scanner Stats Machine Stats 2.	Click Connection Settings.
Connection Settings An Know Steps Machine Statistics Backup Configuration Use Server Connection	ers Configuration System Logs
Server Name or IP Address       127.0.0.1       Disconnect   Connect	Server Connection Area
Login Information Your are not currently connected to a MavBridge server Switch User Change Password	Login Information Area
Automatic Login User 'Admin' has chosen to save his/her password for automatic login. Press the button (below) to clear the saved password, and switch back to manual login. Turn Off Automatic Login	Automatic Login Area
Reload Server Configuration	Save Changes

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).
- 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).

Disconnect Connect	Connected
Login Information	Click Switch User.
You are currently connected as user Admin.	Change Password
Automatic Login	
Automatic Login is turned off: Dashboard will ask to enter credentials when startin	ng.

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.

Log in to MavB	ridge Dashbo 2. Insert username and password.
	MAVRO
	IMAGING
Please en	ter new login information to continue:
Username:	Your_Username
Password:	••••••
	3. Click Login. Always connect as this user Cancel

Figure 2-5: Logging in as another user

To change your password, follow these steps:

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

(Disconnect) Connect Co	onnected
Click Ch	ange Decoward
Click Cli	ange Password.
Login Information	
You are currently connected as user Admin. Switch User	nge Password
Automatic Login	
Automatic Login is turned off: Dashboard will ask to enter credentials when starting.	

#### 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).

Enter old and new pas	swords.
Confirm the new password. Click Change Password.	Change Password <u>C</u> urrent Password: <u>New Password:</u> Confirm Password: <u>Show Passwords</u> Change Password Cancel

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).

Insight Dashboard (Production Environment)
I Eile View Iools Help
I     Image: Status     Configure     Configur
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs
Server Connection
Server Name or IP Address           Disconnect         Connect           Connect         Connected
Login Information
You are currently connected as user Admin. Switch User Change Password
Automatic Login
User 'Admin' has chosen to save his/her password for automatic login. Press the button (below) to dear the credentials, and switch back to manual login. Turn Off Automatic Login
1. Click here to turn off Automatic Login.
2. Save changes.
Connected (Adr

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)

Insight Dashboard (Production Environment)
Eile View Iool 1 Click on Machine Statistics
I Configure Status Scanner Stats Machine Stats
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs
Path to ONS Machine Data Folder
Finable Scanner Stats Import (Enable for Insight-Only sites: Disable for Mayro processing sites)
2. Check here to enable the <b>ONS Machine Data</b> <b>Folder</b> to import statistics.

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.

Configure	Status Scanner Stats Machine Stats 3. Type in the addre	ess here
Connection Set	tings Workflow Steps Machine Statistics Backup Configuration Users Configuration	105
ONS Data Folde	singe ( roman cape ) ( normal cape ) ( comp comparator ) ( comp comp comp comp comp comp comp comp	
Path to ON	IS Machine Data Folder	
T Enable	Scanner Stats Import (Enable for Insight-Only sites: Disable for Mayro processing sites)	
0		
	Browse For Folder X	
		aliak the <b>Browse</b> button
	01	CIICK THE <b>BIOWSE</b> DUILON
	Desktop	
	> Creative Cloud Files	owse for the data folder.
	> 2 Himmel, Jeffrey	
	> 💻 This PC	
	> The Libraries	
	> 🔄 Control Panel	
	Recycle Bin	
	New Writer Practice Exercises     OpenOffice 4.1.10 Language Pack (English) Installation	4. Save changes
	Tert Doce	
	Make New Folder OK Cancel	
Reload	Machine Statistics	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).

I es 2 2 Inst Inst Inst Inst Inst Inst Inst Inst	
Connection Settions Workflow State Machine Statistics Backup Configuration Ulsers Configuration System Lone	
ONS Data Folder	]
Dath to ONIC Machine Data Ender	
\\Customer_Server_IP_Address\Stats\OPEX	
C Enable Scanner Stats Import (Enable for Insight-Only sites; Disable for Mavro processing sites)	
Click Reload Machine Statistics	
for changes to take effect.	
Reload Machine Statistics Parameters saved successfully. Note: Changes will not take effect until you select 'Reload Server Configuration'.	Save Changes
	Connected (Admin)

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.

Insight Dashboard	000
File       View       Tools       Help         Image: Configure Status       Scanner Stats       Image: Configure State       Image: Configure State	
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration	System Logs
Workflow Steps       Select a Workflow Step:       Add       Delete	Search (Summary) Path Variables
Settings Sector: Enter search text Retrieving options	
Reload Server Configuration	Save Changes
	Connected (Admin

Figure 2-14: Workflow Steps

# 2.4.1. Enabling Auto Export

 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

 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).

Configuration Files		
File Home Share View		
Pin to Quick Copy Paste	Move	Properties
access	to - Go to this folder.	👻 🔊 History 🛅 Inver
Clipboard	Organize New	Open Se
Image: A state of the state	+	
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ ] $\rightarrow$ This PC $\rightarrow$ Local [	Disk (C:) > InsightInstall.8.2.8 > Installation Files > Configu	uration Files 🗸 🗸
🚽 Quick access	^ Name	Date modified
	BatchStats.Demo.db	12/1/2023 3:44 PM
o Creative Cloud Files	ConverterSettings.Automatic Stats Export.xml	12/1/2023 3:44 PM
OneDrive - OPEX Corporation	MachineStats.Demo.db	12/1/2023 3:44 PM
📕 AppData	C MavBridgeDemoConfig.xml	Copy this file. <sup>14 PN</sup>

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

 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).

Insight Dashboard
Eile View Iools Help 2. Click here.
Configure         Status         Scanner Stats
Connection Settings Workflow Steps 3. Click on Workflow Steps.
Workflow Steps
Select a Workflow Step: Automatic Stats Export Add Delete Search Summary
Settings 4. Click the drop-down box and
Search: Enter search text Input Setting ChOOSe Automatic Stats Export.

Figure 2-18: Selecting Automatic Stats Export

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



Figure 2-19: Selecting General

**Configure Module** 

**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.

c: \Temp \StatExport \Schedule		
Insight Dashboard		00
File View Tools Help		
Configure Status Scanner Stats Machine Stats		
ionnection Settings Workflow Steps Machine Status Badup Conf Vorkflow Steps Select a Workflow Step: Automatic Stats Export	ration Users Configuration System Logs Add Delete Search Summary	Path Variables
iettings		
Search: Enter Search text Conversion Settings Conversion Settings Processing Options Task Scheduler Import Scheduled Tasks	Task Scheduler c:\Temp\StatExport\Schedule Additional INPUT directories may be specified he Specify one path per line. Leave blank if additional 6. Browse to Input Directory.	ere. nal paths are not needed.
Batch Scanner Settings     Output Settings     Output Settings		
Algorithms Output Format:	Bit Bucket (No Output) c:\temp\put	
Script Code     Drive Space Checki     Debugging     Validate Drive	acce Before Saving Batch	
Scanner Statistics Warning Three	ski (% Ful): (% Ful):	80 \$
Reload Server Configuration	7. Save Changes.	Save Changes
		Connected (adm

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

 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).

Connection Settings Workflow Steps Machine S	Statistics Backup Configuration Users Configuration System Logs
Workflow Steps	
Select a Workflow Step: Automatic Stats Export	Add Delete Search Summary
Settings	Right Column
Search: Enter search text  Search: Enter search text  Conversion Settings Conversion S	<pre>MavScript Code: OPTION SMART_VARS ON ' ' Configuration options: ' Sites can either export the current days' work, or the previou ' (It may be preferrable to export the previous days' work, sinc XExportDateOffset = 0 ' 0 to export today; -1 to export yeste %RangeStart = DateOffset(\$BP[Scheduler.TaskDate], %ExportDateOff %RangeEnd = DateOffset(\$RangeStart, 1) ' Batch Stats Export Options %BatchStatsFolder = "C:\Temp\StatExport\Out" %BatchStatsFilename = "BatchStats.&lt;%RangeStart:'%Y%m%d'&gt;.xml %BatchStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "Statestart:'%Y%m%d'&gt;.cml %MachineStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "Statestart:'%Y%m%d'&gt;.cml %MachineStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "Statestart:'%Y%m%d'&gt;.cml %MachineStatsFolder = "C:\Temp\StatExport\Out" %MachineStatsFolder = "Statestart:'%Y%m%d'&gt;.cml %MachineStatsFolder = "Statestart:'%Y%m%d'&gt;.cml %MachineStatsFormat = "," ' Set as "XML" for XML output, " %MachineStatsFormat = "," ' Set as "XML" for XML output, " %MachineStatsFormat = "," ' Set as "XML" for XML output, " %MachineStatsFormat = "," ' Set as "XML" for XML output, " %MachineStatsFormat = "," ' Set as "XML" for XML output, " %MachineStatsFormat = "," ' Set as "XML" for XML output, " %MachineStatsFormat = "," ' Set as "XML" for XML output, " %MachineStatsFormat = "," ' Set as "XML"</pre>
	' Do not change anything below this line!

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.

Configure Status Scanner Stats Mach	insight *
Connection Settings Workflow Steps Machin	re Statistics   Bodius Configuration   Users Configuration   Switen Loss
Workflow Steps	Pight Column
Select a Workflow Step: Automatic State Eve	
Settings	
Carrotha Enter carroth taxt	MarScript Code:
Search Enter Search text	OPTION SWAR_VARS ON
Conversion Settings	
- General	
- Marking Processed Batches	Configuration options:
- Post-Conversion Settings	
- Processing Options	Date Event Options
Task Scheduler Import	sites an either export the cy Defense for a formation of the state of
General Settings	
Scheduled Tasks	XRangeStart = DateOffset(SDP[Sch
Batch Scanner Settings	NRangeEnd = DateOffset(NRangeStart, 1)
Inine Data Enrichment Modules	
E May Script 1	Batch Stats Export Options
- General Settings	Batch Stats Export Options . A BOX 2
- Script Code	NatchStatsFormat • Nut Mut Mut Mut Mut Mut
- Debugging	
- Help	Wardine Stats taylor ( uptions
- Scanner Statistics	Box 3
	Box 4
	FUNCTION FormatDates(%Table, %DateFormat)
	training time some: IF NoteFormat Like "Miz"
	SReformatiralingTimeZone = TRUE
( Reload Server Configuration )	(Save Changes )

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.

support days' work on the provinged days' work
current days work, or the previous days work
(port the previous days' work, since the data is fully complete.)
o export today; -1 to export yesterday
cheduler.TaskDate], %ExportDateOffset)
geStart, 1)
Set to a value of 0 or -1.
Temp Obt to a value of o of 11
chStats.<%RangeStart:'%Y%m%d'>.xml"
" ' Set as "XML" for XML output, "," for comma separated, " <taf< th=""></taf<>

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.

MavScript Code:		
OPTION SMART_VARS ON		
•		
' Configuration options		
1 Replace	BatchStats with the report file name	
De sites can either even	t the support days' work on the provious days' work	
' (It may be preferrable	e to export the previous days' work, since the data is fully complete.)	Box 2
%ExportDateOffset = 0	' 0 to export today; -1 to export yesterday	
%RangeStart = DateOffse	c(\$BP[Scheduler.TaskDate], %ExportDateOffset)	
ARangeend = Dateorrse	(%Rangestart, 1)	
	/	
' Batch Stats Export Op	tions	
%BatchStatsFolder =	"C:\Temp/StatExport\Out"	
%BatchStatsFilename =	BatchStats, <%Kangestart: %Y%m%d >.xml "XMU" 'Set as "XMU" for XML output " " for comma separated " <tab>" for</tab>	r tah delim
	see as whe for whe success, i for comma separates, this for	r coo dezan
	- There	
MachineStatsEolder =	Jptions "C:\Temp\Statevnort\Out"	
%MachineStatsFilename =	"MachineStats.<%RangeStart:'%Y%m%d'>.csv"	
%MachineStatsFormat =	"," ' Set as "XML" for XML output, "," for comma separated, " <tab>" for tal</tab>	b delimited
2 Keep " <b>XM</b>	I " or replace with "." or " <tab>" for file format</tab>	)
2.11000		)
1		
Do not change anythin	; below this line!	
FUNCTION FormatDates(%T	able, %DateFormat)	
trailing time zone?	¢Q′ → <sup>11</sup>	
%ReformatTrailingTi	neZone = TRUE	
and a second sec		

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.

MavScript Code:	
OPTION SMART_VARS ON	
' Configuration options:	
TRANSPORTANCE INVOLVED TO THE PROPERTY OF THE P	
Date Export Options	the support days' work, on the provious days' work
' (It may be preferrable	to export the previous days' work, since the data is fully complete.)
%ExportDateOffset = 0	' 0 to export today; -1 to export yesterday
%RangeStart = DateOffset	SEP[Scheduler_TaskDate] SExportDateOffset)
1. Replace	<b>MachineStats</b> with the report file name.
' Batch Stats Export Opt:	BOX 3
%BatchStatsFolder =	"C:\Temp\StatExport\Out" "BatchState /\$PangeStant:'\$V%m%d'\\ vml"
%BatchStatsFormat =	"XML" ' Set as "XML" for XML output. "." for comma separated. " <tab>" for tab delimi</tab>
' Machine Stats Export O	itions
MachineStatsFilename =	C:\Temp(Statexport)out
%MachineStatsFormat =	"," ' Set as "XML" for XML output, "," for comma separated, " <tab>" for tab delimited</tab>
' Do not change anything	below this line!
2 Koon "" or i	conlace with "YML" or " <tab>" for file format</tab>
2. Neep , 011	
' trailing time zone?	
1F %DateFormat Like "*	IZ STORE - TRUE
ARCIOI MACH ATTING TIM	ALONE - TRUE

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).

Image: Status         Image: S	S <sup>+</sup> e Stats
Connection Settings Workflow Steps Machine	Statistics Backup Configuration Users Configuration System Logs
Vorkflow Steps	
Select a Workflow Step: Automatic Stats Export	t Add Delete Search Summary
ettings	
Search: Enter search text	Enable
	Task Id or Brief Name: Stat Export
	Missed Event Handling: Pack process all missed events
- General	Prised Event Handling. Data-process all missed events
Marking Processed Ratchag	# Europet state success days from midnight
Post-Conversion Settings	1 Expand Scheduled Tasks
Processing Ontions	II Expand Concurred Tucke.
D Task Scheduler Import	
General Settings	
- Task 1	2 Click on Task 1
··· Task 2	
Task 3	
- Task 4	
Task 5	
	n
- Inline Data Enrichment Modules	
Algorithms	
- May Script 1	
General Settings	
Script Code	
Debugging	
Contraction of the second s	
Help	

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**.)

Search: Enter search text	3. Make sure Enable is checked.			
Conversion Settings	Task Id or Brief Name: Stat Export			
General	Missed Event Handling: Back-process all missed events			
Input File Grouping	Schedule:			
··· Marking Processed Batches	<pre># Export stats every day, just after midnight</pre>			
··· Post-Conversion Settings	*015:41			
Processing Options				
- Task Scheduler Import	4. Schedule the time in 24 hour format.			
···· General Settings				

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.

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.

Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs Actions Quick Backup (Configuration Orly) Download Latest Config Backup Backup Polities Backup Folder Path C:\/Yawra Backup Folder Path C:\/Yawra Backup Configuration Chily Backup Folder Path C:\/Yawra Backup Configuration Chily Configuration Statistics Configuration Statistics Configuration Statistics Configuration Statistics Configuration Statistics Configuration Chily Configuration Statistics Configuration Chily Configuration Chi		<u>C</u> onfigure <u>S</u> tatus	s Sc <u>a</u> nner Sta	ats <u>M</u> achine Stats	insight"
Actions          Quick Backup (Configuration Only)       1       Full Backup (Configuration, Statistics, Loge)       3         Download Latest Config Backup       2       4       5         Backup Options       4       5          Backup Options       4       5          Backup Options       4       5          Backup Colder Path       C: Wavro       6          Ste Name       HomeOffice       6          Backup Log       6           Statup Statup backup reduction to the statup Statup Statup Tull           304 PM       Info       Starting backup reduction to the statup Statup Statup Statup Statup Config          304 PM       Info       Statup configuration sevel successfully           304 PM       Info       Statup configuration sevel successfully           303 PM       Info       Backup configuration Status 8 decessfully           303 PM       Info       Backup configuration sevel successfully           303 PM       Info       Backup configuration Sevel successfully           303 PM	C	onnection Settings	Workflow Step	s Machine Statistics Backup Configuration Users Configuration System Logs	
Quidt Backup (Configuration Only)       1       Full Backup (Configuration, Statistics, Logs)       3         Download Latest Config Backup       2       4       5         Backup Folder Path       LiMarro          Site Name       HomeOffice       1         Files to Exclude       6       1         Stechup Folder Path       Limarco       1         Site Name       HomeOffice       1         Files to Exclude       6       1         Stechup Log       1       1         Time       Level       Event         304 PM       Info       Stacting backup Full         304 PM       Info       Stacting backup Config         304 PM       Info       Stacting backup Config         304 PM       Info       Stacting backup Config         303 PM       Info       Backup configuration saved successfully         303 PM	A	tions			
Badup Polder Path Site Name HomeOffice Files to Exclude  Time Level Event Stackup Log  Time Stackup Log  Stackup Log  Stackup Log  Time Stackup Log  Stackup Log  Stackup Log  Time Stackup Log  Stac		Quick Back	kup (Configurati Latest Config B	on Only)	
Backup Folder Path     ::\Wavro        Site Name     HomeOffice        Files to Exclude     6        Backup Log         Time     Level     Event       > 304 PM     Info     Success: Completed backup 'Full'. Took 0.3 seconds. Size: 2.85MB       304 PM     Info     Starting backup Full'       304 PM     Info     Starting backup 'Config'. Took 0.0 seconds. Size: 2.85MB       304 PM     Info     Starting backup 'Config'.       304 PM     Info     Starting backup config.       303 PM     Info     Backup configuration saved successfully       303 PM     Info     Backup configuration saved successfully       303 PM     Info     Backup configuration loaded successfully       303 PM </td <td>Ba</td> <td>ckup Options</td> <td></td> <td></td> <td></td>	Ba	ckup Options			
Site Name       HomeOffice       5         Files to Exclude       6       4         Badup Log       6       4         Time       Level       Event       5         > 3:04 PM       Info       Success: Completed backup 'full'. Took 0.3 seconds. Size: 2.85MB       4         3:04 PM       Info       Success: Completed backup 'full'. Took 0.3 seconds. Size: 2.85MB       4         3:04 PM       Info       Success: Completed backup 'full'.       7         3:03 PM       Info       Backup configuration saved successfully       3:03 PM       8         3:03 PM       Info       Backup configuration saved successfully       3:03 PM       8       8         3:03 PM       Info       Backup configuration saved successfully       8       8       8         3:03 PM       Info       Backup configuration saved successful		Backup Folder Path	C: Mayro	(4)	
Site Hellic       Patheonice         Files to Exclude       6         State Hellic       6         Time       Level       Event         Time       Level       Event         3:04 PM       Info       Success: Completed backup Yrull'. Took 0.3 seconds. Size: 2.85HB       A         3:04 PM       Info       Success: Completed backup Yonfig'. Took 0.0 seconds. Size: 0.28HB       A         3:04 PM       Info       Success: Completed backup Yonfig'. Took 0.0 seconds. Size: 0.28HB       A         3:04 PM       Info       Success: Completed backup Yonfig'. Took 0.0 seconds. Size: 0.28HB       A         3:04 PM       Info       Success: Completed backup Yonfig'. Took 0.0 seconds. Size: 0.28HB       A         3:04 PM       Info       Success: Completed backup Yonfig'. Took 0.0 seconds. Size: 0.28HB       A         3:04 PM       Info       Success: Completed backup Yonfig'. Took 0.0 seconds. Size: 0.28HB       A         3:03 PM       Info       Backup configuration saved successfully       Si303 PM       Info       Backup configuration saved successfully         3:03 PM       Info       Backup configuration saved successfully       Save Changes       Save Changes         3:03 PM       Info       Backup configuration saved successfully       Save Changes will not take effect until you		Site Name	HomeOffice	(5)	
Files to Exclude       6         Backup Log       Time         Ime       Level         Event       Success: Completed backup 'Full'. Took 0.3 seconds. Size: 2.85MB         3:04 PM       Info         Starting backup Full'       Top         3:04 PM       Info         Starting backup Full'       Top         3:04 PM       Info         Starting backup requested by Dashboard       Top         3:04 PM       Info         Starting backup requested by Dashboard       Top         3:04 PM       Info         Starting backup requested by Dashboard       Top         3:03 PM       Info         Starting backup configuration saved successfully       Starting backup configuration saved successfully         3:03 PM       Info       Backup configuration saved successfully         3:03 PM       Info <t< td=""><td></td><td></td><td>nomeonice</td><td></td><td>-</td></t<>			nomeonice		-
Backup Log         Time       Level         204 PM       Info         Starting backup Full".       Took 0.3 seconds. Size: 2.85MB         304 PM       Info         Starting backup Full".       New backup requested by Dashboard         304 PM       Info         Starting backup Foll"       Starting backup requested backup 'Config'. Took 0.0 seconds. Size: 0.28HB         304 PM       Info         Starting backup Config       Starting backup requested by Dashboard         303 PM       Info         Backup configuration saved successfully       Starting backup configuration saved successfully         303 PM       Info       Backup configuration loaded successfully         303 PM       Info       Backup configuration loaded successfully         303 PM       Info       Backup configuration saved successfully         303 PM       Info       Backup configuration loaded successfully         303 PM       Info       Successfully				6	v
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304 PM     Info     Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.28HB       3:04 PM     Info     Starting backup 'Config'       3:04 PM     Info     New backup requested by Dashboard       3:04 PM     Info     Backup configuration saved successfully       3:03 PM     Info     Backup configuration loaded successfully       3:03 PM     Info     Backup configuration saved successfully       3:03 PM     Info     Save Changes	Ba	ckup Log Time 3:04 PM 3:04 PM	Level Info Info	Event Success: Completed backup 'Full'. Took 0.3 seconds. Size: 2.8514B Starting backup Full' 7	
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3:03 PM Info Badup configuration saved successfully  3:03 PM Info Badup configuration saved successfully  Reload Badup Configuration Reload Badup Configurat	Ba	ckup Log           Time           3:04 PM	Level Info Info Info Info Info Info Info	Event  Event  Success: Completed backup 'Full'. Took 0.3 seconds. Size: 2.85HB  Starting backup Full'  New backup requested by Dashboard  Starting backup 'Config' New backup requested by Dashboard Backup configuration saved successfully	ĺ
3-03-DM         Top         Success: Completed hackun / Confin' Took 0.0 seconds Size 0.28HR         Image: Configuration of the completed hackun / Confin' Took 0.0 seconds Size 0.28HR         Image: Configuration of the completed hackun / Confin' Took 0.0 seconds Size 0.28HR         Image: Configuration of the completed hackun / Config	Ba	Stock         PM           3:04 PM         3:04 PM	Level Info Info Info Info Info Info Info Info	Event Success: Completed backup 'Full'. Took 0.3 seconds. Size: 2.85HB Starting backup Full' New backup requested by Dashboard Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.28HB Starting backup 'Config' New backup requested by Dashboard Backup configuration saved successfully Backup configuration loaded successfully	Û
Reload Backup Configuration Transfers saved successfully. Note: Changes will not take effect until you select Reload Server Configura Save Changes	Ba	ckup Log           Time           3:04 PM           3:03 PM           3:03 PM           3:03 PM	Level Info Info Info Info Info Info Info Info	Event Success: Completed backup 'Full'. Took 0.3 seconds. Size: 2.85HB Starting badup Full" New badup requested by Dashboard Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.28HB Starting badup 'Config' New badup requested by Dashboard Badup configuration loaded successfully Badup configuration saved successfully Badup configuration saved successfully	
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Composited (Admin	Ba	dup Log           Tme           3:04 PM           3:04 PM           3:04 PM           3:04 PM           3:04 PM           3:03 PM	Level Info Info Info Info Info Info Info Info	Event Success: Completed backup 'Full'. Took 0.3 seconds. Size: 2.85HB Starting backup Full' New backup requested by Dashboard Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.28HB Starting backup 'Config' New backup requested by Dashboard Backup configuration loaded successfully Backup configuration saved successfully Backup configuration	▲ ● ■ ■ ■ ■

#### Figure 2-32: Backup Configuration tab.

#### **Configure Module**

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.

Insight Dashboard (Production Environment)	000
Eile View Tools Help	*
Image: Configure     Status     Scanner Stats     Machine Stats	
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs	
Users     Ling List     1     Guest       Groups     Admin     2       M Jones     2       Setup     OFEX Tech       OPEX Tech     3       Policy     4         Group Memberships       Assign Groups     Dashboard Users	
Comments	
Show System Accounts           New User         Delete User         Export         Manage Login	T
	Connected (Admin)

Figure 2-34: User Configuration Overview.

**Note:** The descriptions on the following pages for configuring users, configuring groups, and configuring password policy <u>only apply in their</u> <u>entirety to an OPEX Insight system that is not integrated with Microsoft</u> <u>Active Directory</u>.

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).

Insight Dashboard	O O O.
File View Tools Help	-
Image: Configure     Status     Scanner Stats     Machine Stats	
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs	
Users Password Policy	
Groups Minimum Length: 1 CRequire user password be different from the last 0 C passwords	
Required Complexity: None (disabled)	
Passwords complexity checks are disabled.	
Users may create simple passwords that contain any combination of characters.	
Note: Any minimum length defined above is still enforced.	
Click Policy.	

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

💊 Insight	Dashboard (Production Er	ivironment)	0 🔴 🖨
<u> </u> <u>F</u> ile <u>\</u>	<u>(</u> iew <u>T</u> ools <u>H</u> elp		•
<u>C</u> onfig	gure Status Scanner Sta	DNS <sup>+</sup> ts <u>M</u> achine Stats	
Connecti	on Settings Workflow Steps	s Machine Statistics Backup Configuration Users Configuration System Logs	
Users	Password Policy		
Groups	Minimum Length:	Require user password be different from the last     0      passwords	
Setup	Required Complexity: No	ne (disabled)	
Policy	Pa	isswords complexity checks are disabled.	
	No	ote: Any minimum length defined above is still enforced.	
	Password Expiration		
	Enable Password Expir	ration (2)	
	Passwords expire and m	ust be changed after 90 🗘 days. Display a warning on 597 7 🗘 days before a password expires	
	Disable password expira	tion for the following accounts: Mavro	
	Account Lockout		
	Enable Account Locko	ut	
	Lock user account after	5 🛊 consecutive failed login attempts. Automatically 3 their account after 15 🛊 minutes	
	Disable password lockou	t for the following accounts: Mavro	
			Connected (Admin)

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).

🖕 Insight Dashboard (Production Environment)
Eile View Tools Help
1. Configure the minimum password length.
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs
Users Password Policy
Groups Minimum Length: 8 C Require user password be different from the last 3 C passwords
Required Complexity: None (disabled)
Policy Policy Passwords complexity checks are disabled.
Users may create simple passwords that contain any combination of characters. Note: Any minimum length defined above is still enforced.
2. The password will differ from this number of recent passwords.

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).

File View Tools Help		*
Configure Status Sca	Select <b>None</b> for no password complexity.	
Connection Settings Workflow Users Password Policy Groups Minimum Length: Required Complexity: Policy	Steps       Machine Statistics       Backup Configuration       Users Configuration       System Logs         8       Require user password be different from the last       3       passwords         None (disabled)       Image: State Configuration       Image: State Configuration       Image: State Configuration         Require Complex Password with Microsoft Windows Requirements       Require Complex Password with Custom Requirements       Image: State Configuration       Image: State Configuration         Note:       Any minimum length defined above is still enforced.       Image: State Configuration       Image: State Configuration	

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).

File	View Tools Help		
	• <u>@</u> []	DNS <sup>+</sup>	OP
<u>C</u> onfi	<sup>gure</sup> Select	to have Microsoft Windows password requirements.	
Connect	ion Settings Workflow S	teps Machine Statistics Backup Configuration Users Configuration System Logs	
Users	Password Policy		
Groups	Minimum Length:	8 Require user password be different from the last 3 passwords	
Setup	Required Complexity:	Require Complex Password with Microsoft Windows Requirements	
Policy	ĺ	In addition to any minimum length defined above, passwords must meet the following minimum requirements:	
	,	May not contain the user's account name	
		Must contain characters from at least three of the following categories: - English uppercase characters (A through Z) - English lowercase characters (a through z) - Base 10 digits (0 through 9) - Non-alphabetic characters (for example, !, \$, #, %)	

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).

File	View Tools Help
Confi	gure Status Scanner Stats Mach Select for custom requirements.
Connect	ion Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs
Users	Password Policy
Groups	Minimum Length: 8 🛊 Require user password be difterent from the last 3 🛊 passwords
Setup	Required Complexity Require Complex Password with Custom Requirements
Policy	Require at least one uppercase alpha character Require at least one lowercase alpha character Require at least one numeric character Require at least one symbol character Require at least one symbol character Require password not include user's account name

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).

Policy 1. Enable password expiration.
Must contain characters from at least three of the following categories: 2. Choose when password expires.
- Base 10 digits (0 through 9) - Non-alphabetic characters (for example 3. Select how many days before expiration to display a warning.
Password Expiration Passwords expire and must be changed after 90 to days. Display a warning on login 7 to days before a password expires
Disable password expiration for the following accounts:
Account Lockout

Figure 2-41: Enabling password expiration.

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

Type in accounts for which password expiration is disabled.
Password Expiration
Enable Password Expiration
Passwords expire and must be changed after 90 文 days. Display a warning on login 7 文 days before a pas
Disable password expiration for the following accounts: Admin, Guest

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.

Password Expiration	
Enable Password Expiration	
1. Enable account lockout. ) 90 🛊	days. Display a warning on login 7 🖨 days before a password expire
Disable password expiration for the following accounts:	Admin
2. Choose when loc	kout is triggered.
Account Lockout	
Enable Account Lockout	3. Choose when account is unlocked.
Lock user account after 5 consecutive failed lo	ogin attempts. Automatically unlock their account after 15 😭 minutes
Disable password lockout for the following accounts:	Admin

Figure 2-43: Enabling account lockout.

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

Account Lockout	Type in accoun	ts for which	account lockout	is disabled.	
Lock user account	after 5 🛟 consecutive f	ailed login attempts. A	utomatically unlock their acc	ount after 15 文 minute	s
Disable password	ockout for the following accour	Admin			

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.
- 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>.

. Select Groups butto Connection Settings Workflow Steps Machine Statis	Dn. 2. Click on Add butto	on. opex insight ·
Groups Select a Group: Supervisors	Add Rename Delete Select Users	Export
Group Policy       Group Policy Settings         Policy       Image Statistics         Administration       For Tools         Tools       Ticket Printer         Tools       Group Statistics         Group Policy       Statistics         Group Policy       For Tools         Group Policy       Tools         Group Policy       Statistics         Group Policy       Tools         Group Policy       Tools         Group Policy       Statistics         Group Policy       Tools         Group Policy       Tools         Group Policy       Tools         Group Policy       Statistics         Group Policy       Tools         Group Policy       Tools         Group Policy       Tools         Group Policy       Statistics         Group Pol	Policy Setting Create New Group Name: Managers Copy From: Create Default Group> Create Default Group> Create Default Group> Administrators Supervisors Dashboard Users	. Enter a group ame.
	elp (4. C) from cop	m which to

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.

Eile View Iools Help Configure Status Scanner Stats Machin Connection Settings Workflow Steps Machine Users Groups	Stats Statistics Backup Configuration Users Configuration System		opex insight
Setup Group Policy Settings	1 Select a grou		)
Policy Master Permissions	Policy Set Job Target Rates Rename Filter Items Merge Filter Items Set Jam Clear Time 2. Choose a feature. Help	Setting DENY DENY DENY DENY DENY Choc ALL <re< td=""><td>ALLOW DENY <restore default=""> Right-click and pose the permission: LOW, DENY, or estore Default&gt;</restore></td></re<>	ALLOW DENY <restore default=""> Right-click and pose the permission: LOW, DENY, or estore Default&gt;</restore>
	Controls whether user can set/adjust 'Target Rates' for each job		

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.

C Insight Dashboard	000
1. Select a group. 2. Click <b>Rename</b> .	
Configure Concetion Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs Seter & Groups Seter & Groups Seter a Group: Managers Add Rename Delete Select Users Export Seture 0. Setting Policy 0. Type in the new name. Setting Policy 0. Setting Setting Concel (Setting) 0. Setting (Setting) 0. Setting (	
	Connected (admin)

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.

🔹 Insight	Dashboard		000
File	1. Select a gro	up to delete. 2. Click on <b>Delete</b> .	PEX.
Config	gure Status Scanner Stats Machine S	itats	nsight" *
Connectio	on Settings Workflow Steps Machine Sta	atistics Backup Configuration Users Configuration System Logs	
Users	Groups		
Groups	Select a Group: Managers	Add Rename Delete Select Users Export	
Setup	Group Policy Settings		
	Dashboard     Tools     Tools     Tiket Printer     Messages     Custom Record Searches     Security and Diagnostics	Enable DENY Specific Searches To Allow Confirm Delete Are you sure you want to delete the 'Managers' group? Yes No	
		3. Click on Yes. Help Controls whether users can perform custom record searches in the Keying Station, if configured.	
		ca	onnected (admin)

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.

🔹 Insigl	nt Dashboard	$\Theta \odot \Theta$
File	View Tools Help	
	a g 1. Select a gr	2. Click Select Users.
Con	figure Status Scanner Stats Machir e Stats	
Connec	tion Settings Workflow Steps Machine Statistics	Backup Configuration Users Configuration System Logs
Users	Groups	
Groups	Select a Group: Managers	Add Rename Delete Select Users Export
Setup	Group Policy Settings	Assign Groups
Policy	Master Permissions     Poli	Check each user that should belong to the 'Managers' group.
	⊕ Dashboard     ⊕ Tools	Admin Guest
		M Jones 3. Select users to assign.
		I Higgens
		4 Click on Apply to
		save changes
		save changes.
	Help	
		Select All Clear All Clear All Cancel
		Connected (admin)

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

<ul> <li>Insight Dashboard (Production Environment)</li> <li>File View Tools Help</li> </ul>		0 0 0 •
Configure Status Scanner Stats Machine Stats		
Connection Settings Workflow Steps Machine Statistics	Backup Configuration Users Configuration System Logs	
Users User List Admin Guest M Jones OPEX Tech Policy 1 Show System Accounts	M Jones First Name: Michelle Last Name: Jones Account Status: Active Group Memberships Assign Groups Dashboard Users, Managers 3 Comments 4	
New User Delete User Export	Set Password	
		Connected (Admin)

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.

Conjection Settings Workflow Steps M	achine Statistics Backup Configuration Users Configuration System Logs	
User List Groups Setup Policy	ew User. Name: Admin First Name: Name: Account Status: 3. Enter username	e. Enter password twice.
	Create New User Username: Password: Confirm Password: Confirm Password: Confirm Password: Create	Cancel
		¥.

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.

	First Name:
Create Userna Passwo	4. Check this box to force the user to change the password when logging in.
Confirm	a Password:

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.

Insight Dashboard	000
File View Tools Help	······································
Configure State 1. Click on user.	2. Enter first and last names.
Connection Settings Workflow Steps Machine Statistics Backup Con	iguration Users Configuration System Logs
Users User List M Jones	
Groups Admin First Nam	: Michelle
M Jones Last Name	: Jones
Account S	tatus: Active
Group M	Account Disabled
	Dashboard Users
	Assign Groups
3. Choose account status.	
Commer	ts
A Add	
acomponto	
comments.	
	¥.
Show System Accounts	
New User Delete User Export Set Pa	sword Manage Login
	Connected (Admin)

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).

Insight Dashboard	000			
File View Tools Help	•			
Configure Status Scanner Stats Machine Stats	opex insight *			
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs				
Users User List M Jones				
Groups Guest First Name: Michelle				
Setup OPEX Tech Last Name: Jones				
Policy Account Status: Active	<b>•</b>			
Group Memberships				
Assign Groups Comments				
	<u> </u>			
1. Click on Assign Groups.				
	¥			
Show System Accounts           New User         Delete User           Export         Set Password           Manage Login				
	Connected (Admin)			

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 **App1y** 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).

Assign Groups
Check each group that user 'M Jones' should belong to
Administrators
Dashboard Users 2. Assign the user to groups.
3 Click on Apply
Select All Clear All Cancel

Figure 2-57: Assigning groups.

Group Memberships           Assign Groups             Dashboard Users, Managers	Groups to which the user is assigned.

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).

Insight Dashboard	000
I configure Status Scanner Stats Machine Stats	OPEX insight" *
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs Users User Let Let Z. Waker Groups Cuest Let Z. Waker Boop Polcy Polcy Polcy Polcy Polcy Polcy Crech Configuration System Logs 2. Click on the user's name. Sign Groups Dashboard Users	ers.
3. Click on Delete User.	T

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.

Insight Dashboard	00
File View Tools Help	-
Configure Status Scanner Stats Machine Stats	insight"
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs	
Users       Users       Users       M Jone       1. Click on Users.         Groups       Guest       First       Jones         M Jones       Last Name:       Jones         OPEX Tech       Account Status:       Active         Policy       Group Memberships       Click on the user's name.         Dashboard Users, Managers       Dashboard Users, Managers	
Comments	
3. Click on Export. Show System Accounts New User Delete User Export Set Password Manage Login	•
	Connected (Admin)

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.

🔹 Export Users						×
$\leftrightarrow \rightarrow \neg \uparrow$ $\land$ This PC $\Rightarrow$	> Local Disk (C:) > temp > StatExport	> Out	5 ~			
Organize 👻 New folder					-	0
Desktop ^ N	lame	Date modified	Type Size	1		
<ul> <li>Documents</li> <li>Downloads</li> </ul>	Admin-Stats-10-12-2023.csv Machine Statics Report.csv	4. Select th	ne location for	r the file.	)	
b Music	OperatorStatisticsReport1.csv	6/6/2023 9:07 AM	Microsoft Excel C	10 KB		
5. Enter a	file name.					
tocal Disk (C:)		6. 0	Click on Save	$\mathbf{D}$		
File name: MJones-Info						~
Save as type: CSV File (*.cs	w)					~
∧ Hide Folders			Ì	Save	Cancel	

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.

Insight Dashboard Eile View Tools Help	000
Configure Status Scanner Stats Machine Stats	opex"
Connection Settings Workflow Steps Machine Statistics Backup Configuration Users Configuration System Logs Users Users Admin Groups Admin Groups M Jones I. Click on Users Last Name Last Name Jones Account Status: Active	
Comments 3. Click on Set Password.	
Show System Accounts           New User         Delete User         Export         Manage Login	Connected (Admin)

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."

Set User Password		4. Enter pas	sword twice.	
Username:	M Jones			
Password:			•	
Confirm Password:				
Require user to c	hange password when they log in	Save	Cancel	$\bigcirc$
5. Check to force us	ser to change password when logging in.			
	6.	Save changes.	)	

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.

Insight Dashboard (Production Environment)		00
File View Tools Help		*
Configure Status 1. Select a	user.	
Connection Settings Workflow Steps Machine Statistic	cs Backup Configuration Users Configuration System Logs	]
Users User List	M Jones	
Groups Admin Guest	First Name: Michelle	
Setup OPEX Tech Manag	ge User 'M Jones' Login 🧶 🥚	
Pase	sword Options	•
	Eorce user to change their password the next time they login	
Pa	asswords do not expire.	
Lod	ked Account	
(	Unlock Account	<u>*</u>
Ad	ccount lockout is disabled.	
	Parameter	
		-
Show System Accounts		
New User Delete User Export	Set Password Manage Login 2 Click Manage	ne Login
		jo _ogin.
		Connected (Admin)
		connected (ridinin)

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).

Manage User 'M Jones' Login 🔴
Password Options Eorce user to change their password the next time they login Force user to change password upon login.
Unlock Account Account lockout is disabled.

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

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

Success	)
Successfully configured this account to require the user to change their password the next time they login.	
Click here to close the 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).

Manage User 'M Jon	nes' Login 🔴
Password Options	e user to change their password the next time they login
P Click h	nere to unlock the user's account.
	Unlock Account
Account lockout is	: disabled.

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).

1	lanage User 'M Jones' Login
	Password Options Eorce user to change their password the next time they login Passwords do not expire.
	Click here to close the window.
	Unlock Account
	Account lockout is disabled.

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.

🍗 Insight Da	ashboard							00	0
File View	v Tools	Help Scanner Stats	LIN3 Machine	Click <b>Setup</b> Active Direc	to integra tory.	ate Insight wit	h		4 4
Connectio	settings	Workflow Steps	Machine Statistics	Backup Configuration Users	Configuration Syste	em Logs			
User Grups	Active Dir	ectory/Windows Dom	nain Integration Sett	ings nd Group Membership with Activ	Directory				
Setup	Specifi	the name of the dor	main to query This	setting is required	Directory				
Believ	opean	Domain:	main to query. This	setting is required.					
Folicy	Specify	a comma separated	l list of user names the Mavro,Admin	nat bypass Active Directory and	use the local user datab	ase. This list may include wildcards.	2	_	
	Specifi	the specific Active D	Directory server to g	uery. Leave blank to use the de	fault Active Directory se	erver for the service account.			
	Acti	ve Directory Server:							
	Contro	ls how group member	rship is searched: To	search through all groups recur	sively, specify a single "	**". Otherwise, leave blank to disable	recursion.		
		Recurse Groups:	*						
	Specify	the prefix that all M	lavro related user gr	oups will start with:					
		Group Prefix:	Mavro.						
	The fo	lowing settings speci	fy the account to us	e to communicate with Active Dir	ectory. Leave blank to	use the service account's credentials	a.		
		Username:			Passwo	ord:			
	Custor	n Encryption Configur	ration (Advanced)						
		Encryption Mode:	Use Default Metho	d (Auto Negotiate)				•	
	Test C	onnection to Active [	Directory ) (	Show Required Groups			(	Apply Changes	
								Connected (Admir	in)

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.

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Connected Nettings       Workflow Steps       Machine Statistics       Badup Configuration       Less Configuration       System Logs         Image: Constant Statistics       Disk User       OG User       Computer       Event Type       Event Text       Image: Computer Statistics       V         Image: Constant Statistics       Disk User       OG User       Computer       Event Type       Event Text       Image: Computer Statistics       V         Image: Constant Statistics       Disk User       OG User       Computer Statistics       User Computer Statistics       V         Image: Constant Statistics       Disk User       OG User       Computer Statistics       V       V         Image: Constant Statistics       Disk User       OG USER       User Connected Successfully       V         Image: Constant Statistics       Disk User       Disk User       Connected Statistics       V       V         Image: Connected Statistics       Disk User       Disk User       Disk User       Disk User       Disk User       Disk User         Image: Connected Statistics       Disk User       Disk		Configure	anner Stats	DNS <sup>+</sup> Machine Stats				_			ight" *
Date     Module     User     OS User     Computer     Event Type     Event Text     V       V [7/2024 8:30 M/     Dashboard     Admin     MUones     Muones-7     LOGIN     User connected successfully       8/1/2024 8:32 PM     Dashboard     Admin     MUones     Muones-7     LOGIN     User connected successfully       8/1/2024 8:32 PM     Dashboard     Admin     MUones     Muones-7     LOGIN     User connected successfully       8/1/2024 8:42 AM     Dashboard     Admin     MUones-7     LOGIN     User connected successfully	Co	onnection Settings Work	kflow Steps	lachine Statistics	s Backup Config	uration Users (	Configuration	System Logs			
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8/1/2024 4:33 PM       Dashboard       Admin       MJones       MJones-7 LOGU/T       User disconnected normally         8/1/2024 8:42 AM       Dashboard       Admin       MJones-7 LOGU/T       User connected successfully	sLoc	> 8/2/2024 8:30 AM	Dashboard	Admin	MJones	MJones-7	LOGIN	User connected successfully			
B/1/2024 8:42 AM Dashboard Admin MJones MJones-7 LOGIN User connected successfully	cces	8/1/2024 4:33 PM	Dashboard	Admin	MJones	MJones-7	LOGOUT	User disconnected normally			
August 2024 Connected (Admin)		8/1/2024 8:42 AM	Dashboard	Admin	MJones	MJones-7	LOGIN	User connected successfully			
Connected (Admin)	Change Loc	August 20:	24						Refresh	) <u>Exp</u>	ort
										Connec	ted (Admin)

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.

-	In: Fi	sig le	ht Dashboard (Produ View Tools Help	ction Environm	ent)	1. Clic	k on <mark>Sys</mark>	tem Lo	js.
	C	on	Sure Status	2. Click OI	chine Statistics	Backup Configur	ation Users (	Configuration	System Logs
ſ			Date	Module	User	OS User	Computer	Event Type	Event Text
	sLoc	>	8/2/2024 8:30 AM	Dashboard	Admin	SAdams	InsightServ	LOGIN	User connected successfully
	cces		8/1/2024 4:33 PM	Dashboard	Admin	SAdams	InsightServ	LOGOUT	User disconnected normally
U	4		8/1/2024 8:42 AM	Dashboard	Admin	SAdams	InsightServ	LOGIN	User connected successfully
	Change Log								

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.

<b>-</b>	insig	ht Dashboard (Produ	ction Environment	)			ok on Sv	etom Loge
	Eile	<u>V</u> iew <u>T</u> ools <u>H</u> elp				T. Cit		stem Logs.
	( <u>C</u> on	figur <u>S</u> tatus	2. Click o	n <b>Chan</b>	ge Log	$\mathbf{D}$		<pre>or ir</pre>
C	Conny-tion Settings Workflow Steps Machine			e Statistics Bad	kup Configuration	Users Confi	guration System	Logs
	1	Date	Module	Mavro User	Windows User	Computer	Event Type	Event Text
2	>	8/6/2024 1:48:41 PM	Dashboard	Admin	SAdams	InsightS	GROUP MEMBER	Added user 'JHancock' to group 'Dashboard Users'.
ğ		8/6/2024 1:48:41 PM	Dashboard	Admin	SAdams	InsightS	CREATE USER	Created new user 'JHancock'.
		8/6/2024 1:47:17 PM	Dashboard	Admin	SAdams	InsightS	USER PROFILE	Changed First/Last Name for user 'AClark' to Abraham Clark.
8		8/6/2024 1:47:10 PM	Dashboard	Admin	SAdams	InsightS	USER DETAILS	Set Allowed Workflow Queues for user 'AClark' to '*'.
le L		8/6/2024 1:47:10 PM	Dashboard	Admin	SAdams	InsightS	USER DETAILS	Set Allowed Lockbox List for user 'AClark' to '*'.
han		8/6/2024 1:47:10 PM	Dashboard	Admin	SAdams	InsightS	USER PROFILE	Changed First/Last Name for user 'AClark' to Abraham .
6	J	8/6/2024 1:47:01 PM	Dashboard	Admin	SAdams	InsightS	GROUP MEMBER	Added user 'AClark' to group 'Dashboard Users'.
		8/6/2024 1:47:01 PM	Dashboard	Admin	SAdams	InsightS	CREATE USER	Created new user 'AClark'.

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**

3.1. Status Module Overview	32
3.2. Overview Tab.83.2.1. Server Status Area83.2.2. Scanner Activity Area83.2.3. Server Alarms Area8	<b>33</b> 34 36 39
3.3. Scanner Status Tab 9	)3
3.4. Machine Status Tab       9         3.4.1. Productivity Graph       9         3.4.2. Recent Activity       9         3.4.3. Software Versions       9	) <b>4</b> )7 )8 )9
<b>3.5. Server Activity Tab</b> 10         3.5.1. Pause Refreshing of Recent Activity Display.       10         3.5.2. Text Search in Recent Activity Area       10	)1 )2 )3
3.6. Alarms Tab	)7

# **OPEX Insight**<sup>™</sup>

**User Manual** 

### **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.

		tus sc <u>a</u> nner stats	Machine Stats						
Overvi	Scann	er Status Machine	e Status Server Acti	vity Alarms					
Ø	Server is ru Server Ver Server Upt Memory Us	urning normally. sion: v8.2.8.0 (Produ tin e: 18:23 sage: 17,320 K	ction Environment)						
(1	Activity	2)(3	3) (4)	)	Batch Id	Last Activity	Transactions	Pager	Throughput
> Ac	tive	Falcon #5	Kate Lemmon	White Mail	03012144	11:03 AM	50	100	2,168 pages/hr
Ac	tive	Gemini #9	Danielle Smith	Tax Forms	07012145	11:03 AM	5	10	4,000 pages/hr
Ac	tive	FalconV #6	Eric Stevens	Tax Forms	04012143	11:02 AM	100	200	3,348 pages/hr
Ac	tive	Falcon+ #7	Bo DiBartolo	Remittance	05012142	11:01 AM	100	200	4,800 pages/hr
Ac	tive	A57200i #2	Winston Church	White Mail	02012140	10:59 AM	12	25	1,836 pages/hr
Ac	tive	FalconV+ #8	Jeff Albertson	Tax Forms	06012137	10:57 AM	25	50	3,214 pages/hr
Ina	active	AS3690i #1	Jonas Grumby	Applications	01012120	9:28 AM	100	200	1,909 pages/hr
Server	· Alarms	Level	Event					Ack	nowledged By Ack

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.

File View		_	-				_		0 (
Configure 1	Tools Help Status Scanner Stats	DNS <sup>+</sup> Machine Stats	_		_			<b>4</b>	<b>JPEX</b> nsight
verview Sca	anner Status Machin	e Status Server Acti	vity Alarms						
erver Status									
Server i Server i Server i Memory	s running normally. Version: v8.2.8.0 (Produ Jptime: 01:01 r Usage: 16,684 K	uction Environment)							
canner Activity	Machina	Operator	lah	Patch Id	Look Activity	Transactions	Dages	Three	un hourt
Active	Falcon #5	Maria Doppler	White Mail	05012251	8-10 AM	50	Pages	2.50	) pages /br
Active	Falcon #6	Kate Lemmon	Remittance	06012251	8:16 AM	3	5	3.00	nages/hr
Active	FalconV #7	Fric Stevens	Tax Forms	07012249	8:15 AM	2	5	5,00	nages/hr
Active	A57200i #2	Kate Lemmon	Applications	02012247	8:12 AM	5	10	3.60	D pages/hr
Inactive	AS7200i #3	Eric Stevens	White Mail	03012239	7:19 AM	12	25	3,913	pages/hr
Inactive	AS7200t #4	Winston Churchman	Remittance	04012240	6:35 AM	25	50	5,294	pages/hr
-		Courses L Elbora		and the second second	and the second second				
Inactive	AS3690i #1	Susan Hilton	Remittance	01012237	6:31 AM	100	200	4,114	pages/hr
Inactive erver Alarms	AS3690i #1	Event	Remittance	01012237	6:31 AM	100	200	4,114 Acknowledged By	pages/hr
Inactive erver Alarms Time 6:05 AM	AS3690i #1	Event Drive space warnin	Remittance	01012237 % full. This drive m	6:31 AM	100 (See MavBridgeSett	200 ings.ini)	4,114 Advnowledged By	pages/hr
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Inactive erver Alarms Time 6:05 AM 4/19/2020 4/19/2020	AS36901 #1 Level Warning 2:18 PM 10:18 Warning	Event Drive space warnin Drive space warnin Drive space warnin	Remittance g: Drive 'C:\' is 92 g: Drive 'C:\' is 89 g: Drive 'C:\' is 89	01012237 % full. This drive m % full. This drive m % full. This drive m	6:31 AM ay require cleanup. ay require cleanup. ay require cleanup.	100 (See MavBridgeSett (See MavBridgeSett (See MavBridgeSett	200 ings.ini) ings.ini)	4,114 Admowledged By	Ack
Inactive erver Alarms Time 6:05 AM 4/19/2020 4/19/2020 4/19/2020	AS3690I #1 Level Warning 2:18 PM Warning 10:18 Warning 6:18 AM Warning	Event Drive space warnin Drive space warnin Drive space warnin Drive space warnin Drive space warnin	Remittance g: Drive 'C:\' is 92 g: Drive 'C:\' is 89 g: Drive 'C:\' is 89 g: Drive 'C:\' is 92 g: Drive 'C:\' is 92	01012237 % full. This drive m % full. This drive m % full. This drive m % full. This drive m	6:31 AM ay require cleanup. ay require cleanup. ay require cleanup. ay require cleanup.	100 (See MavBridgeSett (See MavBridgeSett (See MavBridgeSett (See MavBridgeSett	200 ings.ini) ings.ini) ings.ini)	4,114 Adknowledged By	Ack
Inactive arver Alarms Time 6:05 AM 4/19/2020 4/19/2020 4/19/2020 4/18/2020	AS3690I #1 Level Warning 2:18 PM Warning 10:18 Warning 6:18 AM Warning 6:07 PM Warning	Event Drive space warnin Drive space warnin Drive space warnin Drive space warnin Drive space warnin	Remittance g: Drive 'C:\' is 92 g: Drive 'C:\' is 89 g: Drive 'C:\' is 89 g: Drive 'C:\' is 92 g: Drive 'C:\' is 92 g: Drive 'C:\' is 92	01012237 % full. This drive m % full. This drive m % full. This drive m % full. This drive m % full. This drive m	6:31 AM ay require cleanup. ay require cleanup. ay require cleanup. ay require cleanup. ay require cleanup.	100 (See MavBridgeSett (See MavBridgeSett (See MavBridgeSett (See MavBridgeSett (See MavBridgeSett	200 ings.ini) ings.ini) ings.ini) ings.ini)	4,114 Admowledged By	Ack
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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):

Scar	nner Activity								
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throughput
>	Active	Falcon #5	Maria Doppler	White Mail	05012251	8:19 AM	50	100	2,500 pages/hr
	Active	Falcon #6	Kate Lemmon	Remittance	06012250	8:16 AM	2	5	3,000 pages/hr

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).

4	Insight Dashb	poard								0	00
	File View	Tools Help									Ŧ
=	Configure Overview Sc Server Status Server Server Server Server Server	Status Scanner Statu sonner Status Machir is running normally. Version: v8.2.8.0 (Prod Uptime: 01:01 v Usane: 16.684 K	Machine Stats te Status Server Activ uction Environment)	vity Alarms	_				Ç,	nsight	t" T
	( include)	, osuger 10,00 m									
	Canner Activity	1									
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throu	ighput	
	> Active	Falcon #5	Maria Doppler	White Mail	05012251	8:19 AM	50	100	2,500	) pages/hr	
	Active	Falcon #6	Kate Lemmon	Remittance	06012250	8:16 AM	2	5	3,000	) pages/hr	
	Active	FalconV #7	Eric Stevens	Tax Forms	07012249	8:15 AM	2	5	6,000	) pages/hr	
	Active	A57200i #2	Kate Lemmon	Applications	02012247	8:12 AM	5	10	3,600	) pages/hr	
	Inactive	AS7200i #3	Eric Stevens	White Mail	03012239	7:19 AM	12	25	3,913	pages/hr	
	Inactive	AS7200t #4	Winston Churchman	Remittance	04012240	6:35 AM	25	50	5,294	pages/hr	
	Inactive	AS3690i #1	Susan Hilton	Remittance	01012237	6:31 AM	100	200	4,114	pages/hr	
	Gerver Alarms	Level	Event						Acknowledged By	Ack	
	> 6:05 AM	Warning	Drive space warning	g: Drive 'C:\' is 92°	% full. This drive m	ay require cleanup.	(See MavBridgeSet	tings.ini)			<u> </u>
	<mark>4/19/2020</mark>	2:18 PM Warning	Drive space warnin	g: Drive 'C:\' is 89°	% full. This drive m	ay require cleanup.	(See MavBridgeSet	ings.ini)			
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L	4/10/2020		D	0	W Z.H TL: J.t		/				
									Co	nnected (ad	dmin)

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.

5	Server Alarms					
	Time	Level	Event	Acknowledged By	Ack	
	8/10/2024 9:13 PM	Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic Stats Export			
	8/10/2024 8:58 PM	Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic Stats Export			
	8/10/2024 8:43 PM	Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic Stats Export			
	8/10/2024 8:28 PM	Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic Stats Export			
	8/10/2024 8:13 PM	Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic Stats Export			
	8/10/2024 7:58 PM	Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic Stats Export			
	8/10/2024 7:43 PM	Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic Stats Export			
		·				•
				Co	nnected (Ad	dmin)

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.

	Ser	rver Alarms			4. Check to acknow	ledge.		
		Time	Level	Event		Acknowledged By	Ack	
	>	6:05 AM	Warning	Drive space warning: Drive 'C:\' is 92% full. This drive may	/ require cleanup. (See MavBridgeSettings.ini)			4
ľ		4/19/2020 2:18 PM	Warning	Drive space warning: Drive 'C:\' is 89% full. This drive may	require cleanun. (See MavBridgeSettings ini)			

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).

I       Eile       View       Iools       Help         I       Image: Status	÷ r							
Image: Configure Status       Image: Configure Status <td>e la la</td>	e la							
Overview Scanner Status Machine Status Server Activity Alarms	Configure Status Scanner Stats Machine Stats							
Status Machine 🔺 Operator Job Batch Id Last Activity Transactions Pages Throughp	ut							
Inactive AS3690i #1 Susan Hilton Applications 01012115 9:25 AM 50 100 4,000 pag	jes/hr							
Active         A57200i #2         George Anderson         Applications         02012164         11:38 AM         12         25         2,250 pa	ges/hr							
Active         Falcon #5         Susan Hilton         Tax Forms         03012168         11:42 AM         5         10         5,142 pa	ges/hr							
Active Falcon+ #7 Jeff Albertson Applications 05012166 11:39 AM 50 100 3,076 pa	ges/hr							
Active FalconV #6 Judy Mulberry Applications 04012165 11:38 AM 2 5 6,000 pa	ges/hr							
Idle         FalconV+ #8         Eric Stevens         Tax Forms         06012132         10:59 AM         2         5         6,000 pa	ges/hr							
Active Gemini #9 Maria Doppler Applications 07012167 11:40 AM 5 10 2,571 pa	ges/hr							
Connec	ted (Admin)							

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.

-	🖕 Insight Dashboard (Production Environment)							
	Eile <u>V</u> iew <u>I</u> ools <u>H</u> elp							
	Configure S	itatus Scanner Stats Macl	INS <sup>+</sup> hine Stats	_			_	
		Machina Statur	Server Activity Alarma	)				
	Status	Machine Machine	Operator	lah	Input	Food Date	Active Job Time	Last Activity
	Jammed	A53690 #988	Judy Mulberry	White Mail	81	1.715 /hr	0:02:50	8/13/2024 1:18 PM
-	Running	A57200 #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
6	Productivity Gra	ph Recent Activity Softw	vare Versions	0				
	2000						10.1	
	P 1500							
	ja 1300							
	S 1000							
	0 500							
	0							
	0	6:00 AM 6:15 AM 6	:30 AM 6:45 AM 7:00	0 AM 7:15 AM 7:30 AM	1 7:45 AM	8:00 AM	8:15 AM 8:30 AM 8	1:45 AM 9:00 AM
								Connected (Admin)

Figure 3-10: Machine Status tab

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

Overview Sc	canner Status Machine St	Server Activity Alarm	s				
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	A57200 #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

💊 Ins	💿 Insight Dashboard (Production Environment)							
<u>F</u> ile	e <u>V</u> iew <u>⊺</u>	ools <u>H</u> elp						•
Co	onfigure St	tatus Scanner Stats Mach	nine Stats					🥌 insight" 👗
		anne Statur. Martina Statur	Conver Antivity Alarma	1	_	_		
Over	tatus	Machine Machine Status	Operator	lob	Inout	Feed Date	Active Joh Time	Last Activity
	ammed	A53690 #988	Judy Mulberry	White Mail	81	1.715 /hr	0:02:50	8/13/2024 1:18 PM
R	unnina	A57200 #1623	Eric Stevens	Remittance	0	0 /hr	0:00:00	8/13/2024 1:18 PM
R	unning	Falcon #2142	Winston Churchman	White Mail	3,879	1,832 /hr	2:07:00	8/13/2024 1:18 PM
Id	le	FalconV #9425	Judy Mulberry	Remittance	251	1,704 /hr	0:08:50	8/13/2024 1:14 PM
R	unning	Falcon+ #9636	Mary Tyler	Applications	275	1,867 /hr	0:08:50	8/13/2024 1:18 PM
R	unning	FalconV+ #9702	Maria Doppler	Tax Forms	395	2,002 /hr	0:11:50	8/13/2024 1:18 PM
R	unning	Gemini #9862	Nadine Smykowski	Applications	200	2,057 /hr	0:05:50	8/13/2024 1:18 PM
R	unning	Eagle #5	Winston Churchman	Applications	56	1,680 /hr	0:02:00	8/13/2024 1:18 PM
R	unning	Eagle #11	Eric Stevens	Remittance	211	2,052 /hr	0:06:10	8/13/2024 1:18 PM
R	unning	Model 51 #15794	Danielle Smith	White Mail	0	0 /hr	0:00:00	8/13/2024 1:18 PM
Id	le	Model 60 #12345	Kate Lemmon	Tax Forms	283	1,959 /hr	0:08:40	8/13/2024 1:15 PM
R	unning	Model 72 #23453	Mike McCormick	Remittance	70	2,100 /hr	0:02:00	8/13/2024 1:18 PM
R	unning	MPE 7.5 #1	Eric Stevens	Remittance	281	2,023 /hr	0:08:20	8/13/2024 1:18 PM
R	unning	MPS 40 #7	Eric Stevens	Remittance	130	2,034 /hr	0:03:50	8/13/2024 1:18 PM
Id	le	System 150 #443	Jeff Albertson	Tax Forms	294	1,824 /hr	0:09:40	8/13/2024 1:16 PM
Pro	ductivity Gra	Pecent Activity Softw	are Versions	0				
	ductivity drag	Solor Activity Solor						
	2000	<b>↓</b>	<b>A</b>				a far an far	
2	2000							
L L	1500	$\hat{\mathbf{O}}$	3					
ā s	1000		<u>ی</u>					
lece	500							
"	500							
	0	6:00 AM 6:15 AM 6	30 AM 6:45 AM 7:00	AM 7:15 AM 7:20 Ab	7:45 AM	8.00 AM	9:15 AM 9:30 AM	2:45 AM 0:00 AM
		0.00 AM 0:13 AM 0	.30 AM 0175 AM 7100	7.15 AM 7:15 AM	MA CP: 1	0100 AM	0.13 AM 0.30 AM 0	5100 API
								Connected (Admin)

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).

P	roductivity Graph Recent Activ	vity Software Versions				
	Start Time	End Time	Operator	Job 🔻	Input	Feed Rate
	12/31/2020 7:13 AM	12/31/2020 7:47 AM	George Anderson	Tax Forms	2,474	4,835 /hr 🔺
	12/31/2020 7:47 AM	12/31/2020 8:18 AM	George Anderson	Tax Forms	2,254	4,748 /hr
>	12/31/2020 8:19 AM	12/31/2020 8:52 AM	George Anderson	Tax Forms	2,451	4,821 /hr
	12/22/2020 8:23 AM	12/22/2020 8:47 AM	Laura Petri	Remittance	1,439	4,006 /hr 🕥
	12/23/2020 6:34 AM	12/23/2020 7:06 AM	Mary Tyler	Remittance	1,955	4,012 /hr
	12/23/2020 7:07 AM	12/23/2020 7:31 AM	Mary Tyler	Remittance	1,497	4,048 /hr
	12/23/2020 8:26 AM	12/23/2020 8:43 AM	George Anderson	Remittance	793	3,063 /hr
	10/02/0000 0+17 AM	10/02/0000 10+07 AM	Coorco Andorcon	Domittanco	0.005	2.076 hr

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.

Insight Dashboard (Production Environment)									
File View	File View Tools Help								
Configure S	Configure Status Scanner Status Convert Articity Alarma								
Overview Sca	nner Status Machine Status	Server Activity Alarms							]
Status	Machine	Operator	Job		Input		Feed Rate	Active Job Time	Last Activity
Running	A53690 #988	Danielle Smith	Applications			193	1,930 /hr	0:06:00	1/15/2025 10:33 AM
Running	AS/200 #1623	Mary Tyler	Remittance			207	1,//4 /hr	0:07:00	1/15/2025 10:33 AM
Running		Jonas Grumby	Applications			4,507	1,893 /nr	2:22:50	1/15/2025 10:32 AM
Running	Falcon #9425	Kata Loppier	Applications			0 E	2,160 /hr	0:00:10	1/15/2025 10:33 AM
Pupping	FalconV+ #9703	Jonas Grumby	White Mail			363	1,000 / IIr	0.00.10	1/15/2025 10:33 AM
						225	1.760 /hr	0:07:40	1/15/2025 10:33 AM
<b>I</b> ( 1. (	JICK ON SOT	tware vers	ions.			272	1.813 /hr	0:09:00	1/15/2025 10:33 AM
Running	Eagle #11	George Anderson	Applications			191	1,910 /hr	0:06:00	1/15/2025 10:33 AM
Running	Model 51 #15794	Jonas Grumby	White Mail			102	1,932 /hr	0:03:10	1/15/2025 10:33 AM
Running	Model 60 #12345	Mike Mg							1/15/2025 10:33 AM
Running	Model 72 #23453	paniell 2. CII	ck on a r	ow	to	hig	hlight	a machine.	1/15/2025 10:33 AM
Running	MPE 7.5 #1	Nike McCormick	Tax Forms			381	1,905 /hr	0:12:00	1/15/2025 10:33 AM
Idle	MPS 40 #7	Winston Churchman	Applications			243	1,944 /hr	0:07:30	1/15/2025 10:29 AM
Idle	System 150 #443	Winston Churchman	Applications			271	1,806 /hr	0:09:00	1/15/2025 10:32 AM
			0						
Productivity Gra				Et. Ve				Tourstown	]
Application		Location		2 14	rsion			5/19/2024 0:02 AM	
Host		C:\Opex\Bin\Ealcon+eve		1.23				4/1/2023 9:02 AM	
, and the second s		er lepen part accorrige						12/2020 2102 141	
	( 3. View	the maching	ne's soft	war	e a	Ind	firmw	are version	s. )
									Connected (Admin)

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.

Productivity Graph Recent Activity Software Versions							
Application	Location	File Version	Timestamp				
> Controller	C:\Opex\Bin\Controller.bin	2.14	12/24/2019 12:44 PM				
Host	C:\Opex\Bin\MPE 7.5.exe	2.20	4/8/2019 1:44 PM				

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.

Configure Status Scanner Stats Machine Stats							
Overview Scanner Stat	tus Machin	e Status Server Activity Alarms					
Current Activity							
Module		Activity	Duration				
Main Service		<ide></ide>	00:00:00				
Machine Stats		<ide></ide>	00:00:00				
Recent Activity		Current Act					
Time	Level	Event					
> 9:10 AM 9:05 AM	Warning Warning	Prive space warning: Drive 'C:\' is 91% full. This drive may require cleanup. (See MavBridgeSettings.ini) Unable to auto-clean success folder: Success folder must be an absolute path (Automatic Stats Export Task)					
8:07 AM	Info	avBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds.					
8:07 AM	Info	Backup configuration loaded successfully					
	7-6-	MavBridge is running in PRODUCTION MODE (Mode Id 'Prod').					
9/21/2023 5:26 PM	TULO						
9/21/2023 5:26 PM 9/21/2023 5:26 AM	Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T	ack)				
9/21/2023 5:26 PM 9/21/2023 5:26 AM 9/21/2023 5:26 PM	Warning Info	Unable to auto-clean success folder: Success folder must be an absolute path.(Automatic State Export T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds.	tivity				
9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM	Info Warning Info Info	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Evenet T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully	tivity				
9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 8:10 AM	Info Warning Info Info Info	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Evender T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id 'Prod').	tivity				
9/21/2023 5:26 PM 9/21/2023 5:26 AM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 8:10 AM 9/21/2023 8:10 AM	Marning Info Info Info Info Warning Warning	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Evenet T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id 'Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T	ask)				
9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/21/2023 8:10 AM	Marning Info Info Info Info Info Info Info Info	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Evonet T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id 'Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds.	tivity ask)				
9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/21/2023 8:10 AM	Marning Info Info Info Info Info Info Info Info	Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Evonet T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully	tivity ask)				
9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/21/2023 8:10 AM	Marning Info Info Info Warning Info Info Info	Unable to auto-clean success folder: Success folder must be an absolute path /Automatic State Support T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id Prod').	tivity ask)				
9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/220/2023 8:10 AM	Marning Info Info Info Warning Info Info Info Warning	Unable to auto-clean success folder: Success folder must be an absolute path /Automatic State Senart T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id 'Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T. MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id 'Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T. MavBridge is running in PRODUCTION MODE (Mode Id 'Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T.	ask) ask)				
9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 5:26 PM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/21/2023 8:10 AM 9/20/2023 8:10 AM 9/20/2023 8:10 AM	Marning Info Info Info Marning Info Info Info Marning Info	Unable to auto-clean success folder: Success folder must be an absolute path /Automatic State Senart T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id 'Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge is running in PRODUCTION MODE (Mode Id 'Prod'). Unable to auto-clean success folder: Success folder must be an absolute path (Automatic State Export T MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds. Backup configuration loaded successfully MavBridge Service v7.7.9.0, 64-bit started successfully in 0.2 seconds.	ask) ask)				

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).

7/26/2024 1:20 PM 7/26/2024 1:20 PM	Info Info	New backup requested					
7/26/2024 1:20 PM	Info						
		Success: Completed backup Config. Took 0.0 seconds. Siz	e: 0.30MB				
7/26/2024 1:20 PM	Info	Garting backup 'Config'					
Resume Search							

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).

7/26/2024 1:21 PM	Info	Starting	backup 'Config'			
7/26/2024 1:21 PM	Info	New ba	kup requested by Dashboard			
7/26/2024 1:20 PM	Info	Succes	s: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB			
7/26/2024 1:20 PM	Info	Starting	backup 'Config'			

Figure 3-21: Clicking Search

P	Search Server Activity			0
En	ter the text to search for:			10 milet
<	All Events>	-		Search
	Time	Laval	Event	
L P	Time	Level	Event	

Figure 3-22: Search Server Activity window

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

E	Search Server Activity		
	<all events=""></all>		
	48 Hours 1 Week	evel	Event
	2 Weeks 1 Month 2 Months	<b>-</b> (	Select a time interval.
	3 Months		

Figure 3-23: Selecting a time interval

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

Search Server Activity
Enter the text to search for:
CAll Events> Completed Backup Search
Caruar Evente
Time Level Event
(Type in search text and) ( click Search.)

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).

Search Server Activity			
Enter the text to search for:			×
<all events=""></all>	Comp	leted Backup	Search
Server Events (37 matching e	events fo	uund)	
Time	Level	Event	
> 7/29/2024 11:23 1	Info	Success: Completed backup 'Full'. Took 0.8 seconds. Size: 8.60MB	
7/29/2024 11:23 1	Info	Success: Completed backup 'Full'. Took 0.8 seconds. Size: 8.60MB	
7/26/2024 3:14 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	Click here to
7/26/2024 1:21 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
7/26/2024 1:20 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	🚺 Close the window. 📗
7/26/2024 1:20 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
7/26/2024 1:20 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
7/26/2024 1:17 PM	Info	Success: Completed backup 'Full'. Took 0.8 seconds. Size: 8.60MB	
7/26/2024 1:16 PM	Info	Success: Completed backup 'Full'. Took 0.8 seconds. Size: 8.60MB	
7/26/2024 1:14 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
7/26/2024 1:12 PM	Info	Success: Completed backup	
7/26/2024 11:47 1	Info	Success: Completed backur Server Events area	
7/26/2024 11:45 1	Info	Success: Completed backup Commy . rook v.v seconds. size. v.sorio	
12/4/2023 1:56 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
12/4/2023 1:56 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
12/4/2023 1:56 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
12/4/2023 1:56 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
12/4/2023 1:13 PM	Info	Success: Completed backup 'Full'. Took 0.6 seconds. Size: 6.49MB	
12/4/2023 1:13 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
12/4/2023 1:13 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
11/7/2023 2:21 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
11/7/2023 2:21 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	
11/7/2023 2:18 PM	Info	Success: Completed backup 'Config'. Took 0.0 seconds. Size: 0.30MB	

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).

Sile View Tools He	ln			00
Configure Status St	canner Sta	DNS <sup>+</sup> ts Machine Stats		sight"
Overview Scanner Statu	us Machi	ine Status Server Activity Alarms		
Time	Level	Event	Acknowledged By	Ack
> 9:10 AM	Warning	Drive space warning: Drive 'C:\' is 91% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
5:10 AM	Warning	Drive space warning: Drive 'C:\' is 94% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/14/2020 5:38 PM	Warning	Drive space warning: Drive 'C:\' is 91% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/14/2020 1:38 PM	Warning	Drive space warning: Drive 'C:\' is 91% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/14/2020 9:38 AM	Warning	Drive space warning: Drive 'C:\' is 91% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/14/2020 5:38 AM	Warning	Drive space warning: Drive 'C:\' is 94% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/13/2020 8:44 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/13/2020 4:44 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/13/2020 12:44 P	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/13/2020 8:44 AM	Warning	Drive space warning: Drive 'C:\' is 91% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/13/2020 4:44 AM	Warning	Drive space warning: Drive 'C:\' is 94% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/12/2020 6:18 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/12/2020 2:18 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/12/2020 10:18	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/12/2020 6:18 AM	Warning	Drive space warning: Drive 'C:\' is 94% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/11/2020 6:47 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/11/2020 2:47 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/11/2020 10:47	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/11/2020 6:47 AM	Warning	Drive space warning: Drive 'C:\' is 94% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/10/2020 5:37 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/10/2020 1:37 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/10/2020 9:37 AM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/10/2020 9:22 AM	Error	Drive space critical: Drive 'C:\' is 96% full. Cannot process batches until space is freed. (See MavBridgeSet.	-	
4/10/2020 5:51 AM	Warning	Drive space warning: Drive 'C:\' is 93% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
4/9/2020 6:20 PM	Warning	Drive space warning: Drive 'C:\' is 90% full. This drive may require cleanup. (See MavBridgeSettings.ini)		
M 00-0 0-00 PM	Warning	Neiva enara waening: Neiva 'C·\' ic 000% full. This deiva may raquira claanun. /Gaa MayReidnaGattings ini\		
	an around		Cor	nnected (admii

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

Scanner Stats and ONS+ Machine Stats Modules OPEX Insight<sup>™</sup> User Manual OPEX Corporation

# 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.

TIME RANGE	
Weekly	
Daily	12:00 AM
Weekly	
Monthly	+ 11:59 PM
Yearly	
Custom	
FILTERS	

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.

Two ways to customize the time range:				
1. Click Custom:		2.	Click the From	or <b>To</b> date:
TIME RANGE				
Weekly		TIME R	ANGE	
Daily	12:00 AM	Week	у	
Weekly	11:59 PM	From:	Sunday, December 22,	2024 12:00 AM
Yearly		To:	Saturday, December 28	3, 2024 11:59 PM
Custom		Shift:	All Shifts	

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).

Custom Time Range
<u>Start Date:</u> 12/22/2024 ▼ 12:00 AM ◆
End Date: 12/28/2024 11:59 PM
OK Cancel

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).

	Custom Time Range
	Start Date:
	End Date: 12/28/2024 11:59 PM
Click <b>OK</b> to save chang	es. OK Cancel

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."

	FILTERS			
r	Machines	(3 of 7 selected) 🥑		
t	Operators	(All selected) 🥑		
	Jobs	(2 of 4 selected) 🖪		
	Advanced	♥		
	Batch Type	Physical Batches Physical Batches Virtual Batches	3	

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):

FILTERS		
Machines	(All selected)	0
Operators	(All selected)	0
Jobs	(All selected)	0
Advanced	(Extractor)	O
Machine Operation	Extractor	•
Scan Mode	<all modes="" scan=""> All Scan Modes&gt; Normal Extraction</all>	
	IEM Disabled	

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).

FILTERS			
Machines AS3690i #1 AS7200i #2	(3 of 7 selecte		Select All Clear All
Falcon #5 Falcon+ #7 FalconV #6 FalconV+ #8 Gemini #9			Create Group from Selection Delete Existing Group Maintenance
Operators Jobs	(All selected) (All selected)	0	E 23:20:00 ♥ 20:00:00
Advanced Batch Type Ph	nysical Batches	•	Menu

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).
- 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.

	Create New Devices Group		
	Group Name	Falcon-Family Scanners	Provide a group name.
Click on OK.—		OK Cancel	

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.

FILTERS		Operator V
Machines	(All selected)     •       Select All     •       Clear All     •       Create Group from Selection     •       Delete Existing Group     •       Maintenance     •	
Gemini #9 Operators Jobs	All selected)   10 K	Falcon-Family Scanners Gemini Volume
Advanced		

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).

FILTERS	
Machines (3 of	7 selected) of 1. Right-click on an item.
Operators (A	All selected 36:40:00
Danielle Smith     Smith     Eric Stevens	33:20:00
George Anderson	Rename Operator
Jeff Albertson	Merge with And her Operator
Johas Grumby	I 23:20:00
Kate Lemmon	Q 20:00:00
🗹 Laura Petri	:듣 16:40:00
Maria Doppler	
Mary Tyler	13:20:00
Nadine Smykowski	( 2. Click here to rename the item. )
Susan Hilton	6:40:00
Winston Churchman	3:20:00
Jobs (A	All selected)
The second secon	

Figure 4-20: Renaming an item

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

Rename Item Change the name and
New Name: Eric Stevens

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.)

FILTERS		Operator Volume
Machines	(2 of 7 selected) 🕤	
AS3690i #1	Select All	
AS7200i #2	Clear All	
Falcon #5	Create Group from Selection Delete Existing Group	
FalconV+ #8	Maintenance >	Merge Multiple Machines Together
Gemini #9	Select Existing Group	
Operators	(All selected)	
Jobs	(All selected)	
Advanced		

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).

	iple Machines		🔿 🔴 🔴
Testeveliere			
Instructions			
Select one o You can the	or more machines that you n n merge these unwanted m	io longer want or need. achines into a single entry, selected at the bottom	
Select Items t	to Merge (2 Selected)		
Machine		Last Activity	
AS3690i #	#1	12/30/2023	
> AS7200i #	‡2	12/30/2023	
Falcon #5	;	12/30/2023	
Falcon+#	\$7	12/30/2023	
FalconV #	6	12/30/2023	
FalconV+	#8	12/30/2023	
Gemini #9		12/30/2023	
Destination Select the it	em to merge into:		
Destination Select the it	em to merge into:		
Destination Select the it AS3690i # AS7200i #	tem to merge into:		
Destination Select the it AS3690i # AS7200i # Falcon #5 Ealcon # 5	tem to merge into:		
Destination Select the it AS3690i # Falcon #5 Falcon # Falcon #6	tem to merge into:		
Select the it AS3690i # AS7200i # Falcon #5 FalconV #6 FalconV + i	tem to merge into: 1 2 7 5 #8		

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.

I Merge	e Multiple Machines		$\odot \odot \odot$			
Instructi	tions					
Select one or more machines that you no longer want or need. You can then merge these unwanted machines into a single entry, selected at the bottom.						
Select It	Items to Merge (2 Selected)					
Mach	chine	Last Activity				
AS36	3690i #1	12/30/2023				
> AS72	7200i #2	12/30/2023				
Falco	con #5	12/30/2023				
6. Click on Merge button. Destinat Select Faicon	Confirm Data Merge You are about to merge all data for 2 This change will be permanent: Once Are you sure you wish to continue?	2 Machine (s) into one Machine 'Falcon #5'? e it is done, it CANNOT be undone. Cancel On OK to complete ge.	Cancel			

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.

Set Target Throughputs	0 0 🔴
Items Per Hour	3,000
	7. Enter the Target Rate.
8. Click OK.	OK Cancel

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).

<ul> <li>Insight Dashboard (Production Environment)</li> <li>File View Tools Help</li> </ul>		008	
Configure Status Scanner Stats Machine	5* Stats	opex insight" *	
TIME RANGE Custom  From: Thursday, August 1, 2024 12:00 AM To: Tuesday, January 28, 2025 12:59 AM Shift: Al Shifts	Report Settings Category Operato Units Pages	SELECTION SUMMARY	Y 🗹 Automatic Refresh
FLITERS Hodimus (3 of 7 selected) Operators (14 of 15 selected) Operators Operators Development Development Development Operators Operat	33:20:00 30:00:00 26:40:00	1,428,600 Pages	4,762 Batches
det by period solution     det by period solution     det by period solution     det by period solution     det by the det by period     det by the det by period     det by the det by period     det by per	23:20:00	Last Update: 10:39:3	9 AM
Nodor Smykowski     Sonor Hitlan     Instan Churchman     Sanor Churchman     Selection SuffMark     Selection SuffMark     V     Selection SuffMark     V	6:40:00 3:20:00 0:00:00		
1,428,600 Pages 4,762 Batches Last Update: 10:44:40 AM	1 1	8/1/2024 through 1/28/2025	

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).

SELECTION SUMMARY 🗹 Automatic Refresh
9,368,324 Items 3,819 Runs
Last Opdate: 11:13:09 AM

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):

Setting	Available Selections
	Operator
Catagony	Machine
Calegory	• Job
	Summary
	Comparison
Туре	Individual
	• Total
	Batches
Units	Transactions
	Pages
Intonval	Interval is the X axis (time) of the
	on the <b>TIME RANGE</b> selection.
Favorites	Drop-down list of Default settings plus favorite settings.

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

*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).

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

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

# 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).

Report Set	tings							
Category	Operator	•	Type	Total	•			
Units	Items		Interval	Daily	-	Favorites	+ × Default	

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
	Operator
Cotogony	Machine
Calegory	• Job
	Individual Run
	Comparison
Туре	Individual
	• Total
Interval	These selections depend on the <b>TIME</b> <b>RANGE</b> selection, just like with the <b>Scanner Stats</b> 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.

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

Table 4-4: Machine Report Settings: Type

## 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.

	000
Stats	5. Click the plus sign.
Report Settings	
Category Machine Units Transactions	Type     Total     Export       Interval     Daily     Favorites
Volume Throughput	Walldock Runtime Page Types Page Names Grid Report Batch List Report Card
Save Favorite R Report Nar 2,000 1,600	Palcon Family Monthly Throughput Cancel
th 1,200	

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).

Report Set Category	tings Machine	Туре	Total (	8. Clie	ck here.	Export
Units	Transactions	v created Fa	Daily	Favorites	+ × Falcon Family Monthly Default Falcon Family Monthly Throughput Falcon Monthly Volume	Print
	Μ	lachine Th	Gemini Transactions Throughput Job Transaction Throughput			

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.

Report Set	tings					
Category	Job	Type Total				Export
Units	Pages 🗾	Interval Daily	•	Favorites	+ X Default	Print
Volume	Throughput Wallclock	Runtime Pa	ige Types Pag	ge Names	Default Falcon Monthly Volume Gemini Transaction Throughput	ard
		Job Thro	ughput	- Pag	Job Transaction Throughput	

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).

Set	ttings	
ory	Machine Type Total	Export
its	Transactions 3. Click here to delete.	Print
e	Throughput Wallclock Runtime Page Types Page Names Grid Pelete Saved Report Report Card	

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	Туре	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	Туре	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	Туре	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	Туре	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

Volume	Wallclock Runtime Page Types Page Names Grid Report	B
	Throughput measures the PEAK scanning speed, in items per hour.	าร
1,000	Throughput only includes the time that the machine is actively running. As such, Throughput tends to measure the machines' PEAK scanning speed.	

Figure 4-51: Throughput Tooltip

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### 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	Туре	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	Туре	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	Туре	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).

Batch 1 300 items Start Time 9:01:00 AM End Time 9:07:00 AM Run Time 6:00 Batch 2 300 items Start Time 9:08:00 AM End Time 9:14:00 AM Run Time 6:00 Batch 3 300 items Start Time 9:15:00 AM End Time 9:21:00 AM Run Time 6:00

900 items / 18 minutes = 3,000 items/hour

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.

300 items	300 items	300 items
Start Time 9:01:00 AM	Start Time 9:08:00 AM	Start Time 9:15:00 AM
End Time 9:07:00 AM	End Time 9:14:00 AM	End Time 9:21:00 AM

900 items / 20 minutes = 2,700 items/hour

#### 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).

out Wallo	Runtime Page Types Page Names Grid Report Batch List Report Ca	r
Ope	Wallclock measures the AVERAGE scanning speed, in items per hour.	
	Walldock includes the active scanning time plus any short gaps in between batches. (Any gap of less than 15 minutes between batches is included in the scanning time.) As such, Walldock tends to measure the machines' AVERAGE or OVERALL scanning speed.	34

Figure 4-59: Wallclock Tooltip

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# 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	Туре	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	Settinas	for Runti	me Exam	nle 2
IUDIC = IU	neport	Octimg5			

Category	Units	Туре	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	)
	Nepur	Settings	101	Nuntime	LAAIIIPIE J	

Category	Units	Туре	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.
- 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.

🦕 Insight Dashboard	
File View Tools Help	Click here for the Page Types report
📲 🤏 🥝 🎒 ONS	
Configure Status Scanner Stats Machine S	tats
TIME RANGE	Report Settings
Monthly <	Category Operator Type Comparison E
From: Thursday, June 1, 2023 12:00 AM To: Friday, June 30, 2023 11:59 PM	Units Transactions Interval Daily Favorites + X Default
Shift: 7:00 AM to 4:00 PM	Volume Throughput Walldock Runtime Page Types Page Names Grid Report Batch List Report Card
FILTERS	Page Type   Operator  Page Count Total
Machines (All selected) 🗨	+ Page 435,500
Operators (All selected) 🗨	+ Personal Check 155,000
Jobs (All selected) 🔇	
Page Types (All selected) 🗨	Grand Total 745,500
Advanced 🔇	

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.

Insight Dashboard (Production Environment)	
File View Tools Help	
Configure Status Scanner Status	* Stats
TIME RANGE Monthly C Saturday, June 1, 2024 12:00 AM To: Sunday, June 30, 2024 11:59 PM	Report Settings         Category       Operator         Units       Transactions         Transactions       Interval
Shift: All Shifts FILTERS	Volume Throughput Wallclock Runtime Page Types Page
Machines (All selected)	Page     Operator     Page Count Total       + Page     538,800
Jobs (All selected)	+ Personal Check         194,850           + Stub         194,850
Page Types     (All selected)       Advanced	Grand Total 928,500
	•

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).

	Volume Through	out Walldock	Runtime	Page Typ	Page Names Grid Report Batch List Report Card
	Page Type 🔺	Operator 🔺	Page Cou	int Total	1
0	+ Page		1	538,800	Sort "Page Type" by This Column
0	Personal Check	Bo DiBartolo		26,050	Sort "Operator" by This Column
0		Danielle Smith		27,750	
0		Jeff Albertson		27,900	
0		Kate Lemmon		31,500	
		Maria Doppler		28,850	
		Nadine Smykowski		24,300	
e	R	ight-Click	. )	28,50	and select from sorting menu.
	Personal Check rou	31		194,85	in and set of the set ang the set ang
	+ Stub			194,850	
	Grand Total			928,500	

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).

Volume Through	Volume Throughput Walldock Runtime Page Types Page Names Grid Report Batch List Report Card							
Page Type 🔺	Operator 🔺	Page Count To 🍹	<u> </u>					
+ Page		538,800	Sort "Page Type" by This Column					
Personal Check	Nadine Smykowski	24,300	✓ Sort "Operator" by This Column					
	Bo DiBartolo	26,050						
	Danielle Smith	27,750	Remove All Sorting					
	Jeff Albertson	27,900						
	Winston Church	28,500						
	Maria Doppler	28,850						
	Kate Lemmon	31,500						
Personal Check Tot	al /	194,850						
🕂 Stub 🛛 Ri	ght-Click .	194,85	and click on <b>Remove All Sorting</b> .					
Grand Total	-	928,500						

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.

Insight Dashboard				
File View Tools Help	Click h	ere for the F	Page Names report	
	Olick I		age Names report	
🁒 🥝 🎒 ONS	•			
Configure Status Scanner Stats Machine S	tats			
TIME RANGE	Report Settings			
Monthly <	Category Operator	Type Comparison		Export
From: Thursday, June 1, 2023 12:00 AM	Units Transactions	erval Daily	Favorites + × Default	Print
To: Friday, June 30, 2023 11:59 PM				
Shift: 7:00 AM to 4:00 PM	Volume Throughput Wallclock R	untime Page Types Page	Names Grid Report Batch List Report Card	ŋ
FILTERS	Page Type 🔺 Operator 🔺	Page Count Total		
Machines (All selected) <	+ Application Form	63,100		
Operators (All selected) 🥑	+ Attachment	124,000		
Jobs (All selected) 🕣	+ Check	155,000		
Page Names (All selected) 🕣	+ Correspondence	187,500		
Advanced 🔹	+ Stub	155,000		
	+ Tax Form	60,900		
	Grand Total	745,500		
•				
SELECTION SUMMARY Automatic Refresh				
745,500 Pages 2,485 Batches				
Last Update: 9:20:54 AM				
			(	Connected (Admin)
				onnected (Runnin)

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.

Insight Dashboard						000
File View Tools Help						*
Configure Status Scanner Stats Machine	stats	_	_	_	-	opex insight" *
TIME RANGE	Report Settings					
Monthly           >           From:         Thursday, June 1, 2023 12:00 AM         >	Category Operator Sub-C Units Transactions	ategory Time Range Interval Daily	Favorite	es + × Default		Export Print
	Volume Throughput Walldock	Runtime Page Ty	pes Page Names	Grid Report	atch List Report Card	<u>1</u>
FILTERS	Operator A Time Dance A	Grand Total			Theory and	
Machines (All selected) 🗨		Transactions	Throughput	Wall Clock Rate	Run Time	
Operators (All selected) 🕙	+ Bo DiBartolo	31,600	540	420	58:32:57	
Jobs (All selected) 🗨		37,000	691	300	55:53:19	
Advanced 🔇		32,400	724	520	50:52:52	
	Maria Doppler	35,100	662	483	54:30:05	
	Nadine Smykowski	32,000	553	436	57:50:44	
	+ Winston Churchman	40,200	728	517	55:13:39	
	Grand Total	248,500	637	476	389:58:49	
SELECTION SUMMARY Automatic Refresh 745,500 Pages 2,485 Batches Last Update: 11:34:28 AM						
						Connected (Admin)

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).

Insight Dashboard							0 0
File View Tools Help			_				
🔹 🥥 🎒 DNS	•					-	OPEX
Configure Status Scanner Stats Machine St	tats						insight"
THE DANCE	Report Settings						
Monthly	Category Operato	r Sub-Ca	tegory Time Range	-			Export
From: Thursday, June 1, 2023 12:00 AM Fo: Friday, June 30, 2023 11:59 PM	Units Transact	tions 🔽 Ir	nterval Daily	Favorite	es 🕂 🗙 Default	•	Print
Shift: 7:00 AM to 4:00 PM	Volume Through	hput Wallclock	Runtime Page Ty	pes Page Names	Grid Report B	atch List Report Car	rd
FILTERS			Grand Total	~~~~	~		
Machines (All selected) 🕢	Operator 🔺	Time Range 🔺 🖗	Transactions	Throughput	Wall Clock Rate	Run Time	
Operators (All selected)	- Bo DiBartolo	6/1/2023	800	458	421	1:44:50	
lobs (All selected)		6/2/2023	800	491	368	1:37:46	
		6/5/2023	2,400	528	405	4:32:36	
lavanced 🛛		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	
ELECTION SUMMARY 🗹 Automatic Refresh		6/27/2023	1,600	571	461	2:48:12	
		6/28/2023	1,900	538	432	3:32:05	
745,500 Pages 2,485 Batches							

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:	<b>Report Settings</b>	for Grid Report	Example 1
-------------	------------------------	-----------------	-----------

Category	Units	Sub-Category
Operator	Transactions	Machine

Insight Dashl	poard				_		_			00
File View	Tools	Help								
Configure	🥝 Status	Scanner Stats	ONS Machine	Stats	_		_		-	opex insight
TIME RANGE				Report Settings						
From: Thursda To: Friday, : Shift: 7:00 AM FILTERS	y, June 1 June 30, to 4:00	1, 2023 12:00 AM 2023 11:59 PM PM		Units Transac	hput Walldock	Runtime Page Ty	Page Names	es + × Default	atch List Report Car	rd
Machines		(All selec	ted) 🕥	Operator 🔺	Machine 🔺	Transactions	Throughput	Wall Clock Rate	Run Time	
Operators		(All selec	ted) 🕤	+ Bo DiBartolo		31,600	540	420	58:32:57	
Tobo (All selected)		Danielle Smith	AS3690i #1	3,800	428	362	8:52:08	í		
Advanced		(Fill Sciece			AS7200i #2	7,000	722	516	9:42:05	
Advanced		_	0		Falcon #5	5,800	787	558	7:22:24	
					Falcon+#7	3,400	577	451	5:53:27	
					FalconV #6	7,200	821	553	8:46:18	
					FalconV+ #8	5,500	713	490	7:42:38	
					Gemini #9	4,300	821	623	5:14:19	

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.

Insight Dashboard (Production Environment) I File View Iools Help						000
Configure Status	+ Stats				-	opex insight" *
TIME RANGE Monthly  From: Saturday, June 1, 2024 12:00 AM To: Sunday, June 30, 2024 11:59 PM	Report Settings Category Job   Units Transactions  I	nterval Weekly	Favorite	es 🕂 🗙 Default		Export Print
Shift: All Shifts FILTERS	Volume Throughput Wallclock	Runtime Page Ty	pes Page Names	Grid Report Ba	tch List Report Car	d
Machines (All selected)	Job 🔺 Time Range 🔺	Transactions	Throughput	Wall Clock Rate	Run Time	
(All selected)	(+) Applications	74.600	815	674	91:34:51	
Operators (All Selected)	+ Remittance	80,100	625	528	128:07:18	
Jobs (All selected) 🕙	Tax Forms	80,100	998	802	80:15:19	
Advanced 🔇	+ White Mail	74,700	445	400	167:56:15	
	Grand Total	309,500	661	564	467:53:43	
SELECTION SUMMARY						
928,500 Pages 3,095 Batches Last Update: 3:22:44 PM						
						Connected (Admin)

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.

		Grand Total				
Job 🔺	Time Range 🔺	Transactions	Throughput	Wall Clock Rate	Run Time	
- Applications	6/1/2024	18,000	815	668	22:05:3	
	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	22:33:3	
	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 Grand Total		74,700	445	400	167:56:15	
		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

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- **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.
- 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:

Insight Dashboard (Production Environment) File View Tools Help	000
Configure Status	Click here for Report Card.
TIME RANGE         Monthily <ul> <li>C</li> <li>From: Saturday, June 1, 2024 12:00 AM</li> <li>To: Sunday, June 30, 2024 11:59 PM</li> <li>Shift: All Shifts</li> </ul> FILTERS         Machines       (All selected) •         Jobs       (All selected) •         Jobs       (All selected) •         Advanced       •	Report Settings         Category       Machine         Units       Pages         Interval       Weekly         Favorites       * Default         Print         Volume       Throughput         Walclock       Runtime         Page Types       Page Names         Grid Report       Batch List         Report Card       Print         Walchine       Card         Walchine       Card
SELECTION SUMMARY	Machine: AS3690i #1
928,500 Pages 3,095 Batches Last Update: 11:17:41 AM	Page 1 of 3 81% - +
	Connected (Admin)

Figure 4-78: Report Card

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

TIME RANGE Monthly  Konthly  Konth Konthly  Konthly  Konthly  Konthly  Konthly  Kont	ort Settings egory Machine  T Units Pages Inte Iume Throughput Walldock Re Ume B Machine Deta	ype Total	Favorites + × De age Names Grid Repor	fault	Export Print
Monthly Cata From: Saturday, June 1, 2024 12:00 AM To: Sunday, June 30, 2024 11:59 PM Shift: All Shifts FILTERS Machines (All selected) O Operators (All selected) O Jobs (All selected) O	egory Machine I T Units Pages I Inte Iume Throughput Walldock Ru II II & II	ype Total  val Weekly ntime Page Types Page	Favorites + × De age Names Grid Repor	fault  Batch List  Report Ca	Export Print
FILTERS     (All selected) •       Machines     (All selected) •       Jobs     (All selected) •	Iume Throughput Walldock Ru	ntime Page Types Pa	age Names Grid Repor	t Batch List Report Ca	brd
HLTERS Machines (All selected) Coperators (All selected) Jobs (All selected)	Machine Deta	- <b>₽</b> Q <b>\</b> -   ₩ ::	Q Q 81%	💌 🔍 🛛 🔍	
Advanced	Machine: AS: Start Time 5/1/2024 12:00:00 AM 5/15/2024 12:00:00 AM 5/15/2024 12:00:00 AM 5/22/2024 12:00:00 AM	690i #1 Volume (Pages) 23700 25800 22800 22800 600	Throughput (Pages/hr) 1227 1338 1191 1276 1070	Wall Clock (Pages/hr) 929 1002 895 975 944	
	Total	97,800	1,257	951	
	Start Time 5/1/2024 12:00:00 AM 5/8/2024 12:00:00 AM 5/15/2024 12:00:00 AM 5/15/2024 12:00:00 AM	Volume (Pages) 30600 33000 33300 35400	Throughput (Pages/hr) 1763 1884 2090 2196	Wall Clock (Pages/hr) 1212 1309 1384 1398	
SELECTION SUMMARY Automatic Refresh	5/29/2024 12:00:00 AM	600 132 900	1741	1415	

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).

Configure Status	NS* ne Stats
TIME RANGE Monthly  From: Saturday, June 1, 2024 12:00 AM To: Sunday, June 30, 2024 11:59 PM	Report Settings     Report Card toolbar       Category Machine     Interval Weekly       Units Pages     Interval Weekly   Favorites + X Default
Shift: All Shifts FILTERS	Volume Throughput Walldock Runtime Page Types Page Names Grid Report Batch List Report Card
Machines (All selected) 🤇	

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.

Report Settings		
Category Machine Units Pages	Click here to display the rest	of the buttons or
Volume Throug	ghput Walldock Runtime Page Types Page Names Grid Report B	Batch List Report Card
	Maakina Otatiatiaa Daaaat	
Inspire	nize the Insight Dashboard to display	all of the buttons.
Configure Status	S* Stats	
TIME RANGE           Monthly  <	Report Settings           Category Medine         Type           Units         Pages           Interval         Weekly           Favorities         X Default           Watere         Type           Watere         Type           Contained         Deport           Watere         Type           Visitione         Deport           Watere         Type	
FILTERS Machines (All selected) Operators (All selected) Vive (All selected)		0 0 • • • •

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.
- **I.** 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.

Preview	N																									00	
File	Vie	w Ba	ckgrou	nd	_	_													_		_	_					-
۱	80	₩		۳	θ	e	Q	<b>N</b> •	₩	۹	Q	100%	•	Ð	I.		•	M	₽•	•		Ð	•		• •		
a	b	c	d	e	f	g	h	i	j	k						r	'n		n	0	p	C	1	r	s-		

#### 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

vironment)			0 0
			*
	•	(Report Type	
s Machine St	tats		
	Report Setting		
<	Category Ma	hine Type Total	Export
M	Units Ite	Interval Daily	es + X Default V Print
м			
	Volume	oughput Output Jams Rejects Outsorts Thick Sta	ck Reunites Reruns Grid Report Report Card
		Machine Volume	e - Items
elected) 🔇			
elected) 🔇	360 K		AS3690 #988
elected) 🔇			AS7200 #1623
lected) 🔇	320 K		Eagle #11
	280 K		Falcon #2142
	200 1		Falcon+ #9636
	🙃 240 K		FalconV #9425

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

<ul> <li>Insight Dashboard (Production Environment)</li> <li>File View Tools Help</li> </ul>	Click here for the Output Report.
Configure Status Scanner Status Machine St	
TIME RANGE	Report Settings
Monthly C S From: Saturday, June 1, 2024 12:00 AM To: Sunday, June 30, 2024 11:59 PM	Category Job Type Total Export Units Items Therval Daily Favorites + X Default Print
Shift: 8:00 AM to 4:00 PM	Volume Throughput Output Jams Rejects Outsorts Thick Stack Reunites Reruns Grid Report Report Card
FILTERS       Machines     (All selected)       Operators     (All selected)       Jobs     (All selected)       Advanced     (All Selected)	Output Group Detail         Count         V         % Input         % Outputs           > Singles         2,176,792         64.1         65.5%         64.1         65.5%           Multis         1,088,969         32.1         32.8%         7.772         1.7         1.7%           1         1         1.7         1.7%         1.7%         1.7%         1.7%
	Output Rate Output Groups to Track All Output Groups
	Job Output Count
SELECTION SUMMARY V Automatic Refresh	350 K 300 K 250 K 250 K 250 K 150 K 50 K 0 1 3 5 7 9 11 13 15 17 19 21 23 25 27 29 1 1 3 5 7 9 11 13 15 17 19 21 23 25 27 29 1
3,397,003 Items 1,332 Runs	31 2 4 6 8 10 12 14 16 18 20 22 24 25 28 30 June 2024
Last update: 10:44:44 AM	Connected (Admin)

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.

	Output Group	Count 🔻	% Input	% Outputs
>	Singles	2,445,318	64.2	65.6%
	Multis	1,223,281	32.1	32.8%
	RED Output	61,324	1.6	1.6%

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

	Reject Reason	Count 🔻	% Input	% Rejects
>	Too Little Singulation	2,435	0.7	55.0%
	Too Much Singulation	984	0.3	22.2%
	Skewed Piece	533	0.1	12.0%
	Unable to Process Content MICR Data	319	0.1	7.2%
	Invalid Base MICR Report	153	0.0	3.5%

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.

Insight Dashboard		0 0 0
File View Tools Help		•
Configure Status Scanner Stats Machine	ats	
TIME RANGE           Weekly           From:         Sunday, June 4, 2023 12:00 AM           To:         Saturday, June 10, 2023 11:59 PM	Report Settings Category Machine Type Total Turits Items Type Interval Daily Favorites + X Default	Export Print
Shift: 7:00 AM to 3:30 PM	Volume Throughput Output Jams Rejects Outsorts Thick Stack Reunites Reruns	Grid Report Report Card
FILTERS	Reject Reason Detail	
*	Reject Reason Count V % Input % Rejects	Top Reject Reasons
Machines (10 of 15 selected) 💌	➤ Too Little Singulation 2,898 0.4 31.3% ▲	
AS3690 #988	Length Too Long 1,722 0.3 18.6%	
AS7200 #1623	Too Much Singulation 1,454 0.2 15.7%	Top Little Singulation
Eagle #11	Length Too Short 854 0.1 9.2%	Length 100 Long
Eagle #5	Skewed Piece 753 0.1 8.1%	o Much Singulation
Falcon #2142	Unable to Process Content MICR Data 516 0.1 5.6%	Others
Falcon + #9636	Gap Top Small 507 0.1 5.5%	
FalconV # 9725		
Gemini #9862	Reject Rate Reject Reasons to Track All Reject Re	easons
Model 51 #15794	M L: D: LO L	
Model 60 #12345	Machine Reject Count	
Model 72 #23453		
MPE 7.5 #1	A\$3690	#988 System 150 #443
MPS 40 #7	AS7200	/#1623
System 150 #443		-5
Operators (All selected) 🗨	는 2,000 Ealcon	#2142
Jobs (All selected) 🔇	징 1,500 Falcon	+ #9636
· · · · · · · · · · · · · · · · · · ·	Falcon	V #9425
SELECTION SUMMARY 🗹 Automatic Refresh	Falcon	V+ #9702
667,927 Items 297 Runs	Q <sup>1</sup> 500 Gemini	#9862
Last Update: 2:36:21 PM		
		Connected (Admin)

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.

Insight Dashboard	·		-	
File View Tools Help	Click here f	or the	Outsorts Re	nort
Configure Status Scanner Stats Machine S	tats			🍊 insight" 🎽
TIME RANGE	Report Settings			
Weekly	Category Machine Type	Total	•	Export
From: Sunday, July 9, 2023 12:00 AM To: Saturday, July 15, 2023 11:59 PM	Units Items Therval	Daily	Favorites + × Defa	ult Print
Shift: 7:00 AM to 3:30 PM	Volume Throughput Output Jams	Rejects Outso	rts Thick Stack Reunites	Reruns Grid Report Report Card
FILTERS	Outsort Reason Detail			
Machines (10 of 15 selected) <	Outsort Reason	Count 🔻	% Input % Outsorts	Top Outsort Reasons
Operators (All selected) 🔇	> Double Feed	3,485	0.9 47.1%	
Jobs (All selected) 🔇	Length Too Short	1,358	0.4 18.3%	Double Feed
Advanced (All Selected) 🕥		1,121	0.3 15.1%	
	Loo Short	652	0.2 8.8%	Langth Top Share
		462	0.1 0.2%	Others
		) 32/	0.1 4.4%	2
	Outsort Rate		Outsort Reasons to Track	All Outsort Reasons
		Machine	Outsort Count	
				·
	2,500	9		Eagle #11
	2,000			Eagle #5
				System 150 #443
	j _ 1,500			
SELECTION SUMMARY V Automatic Refresh	월 500			
539,409 Items 249 Runs	đ			
Last update: 2:40:09 PM	U			
				Connected (Admin)

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	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

💊 Insight Dashboard	000
File View Tools Help	Click here for the Thick Stack Report.
Configure Status Scanner Stats Machine S	tats
TIME RANGE	Report Settings
Weekly	Category Machine Type Total Type Export
From: Sunday, July 9, 2023 12:00 AM	Units Items 💌 Interval Daily 🔽 Pavorites 🕂 🗙 Default 💽 Print
Shift: 7:00 AM to 3:30 PM	Welvers Threevelowet Output Izers Detecto Outparts Develop Develop Develop Orid Depart Cord
FILTERS	Thick Stack Reason Detail
A	Thick Stack Reason Count V % Input % Thick Stack Top Thick Stack Reasons
Machines (1 of 15 selected) 💎	> Thick 305 0.5 53.7%
AS3690 #988	Thickness Change 99 0.1 17.4%
AS7200 #1623	Thickness Peak 96 0.1 16.9%
Eagle #11	Folded Check 68 0.1 12.0%
Falcon #2142	Folded Check Thickness Change
Falcon + #9636	
FalconV #9425	
Gemini #9862	Thick Stack Rate
Model 51 #15794	
Model 60 #12345	Machine Thick Stack Count
Model 72 #23453	: 200 MPE 7.5 #1
MPE 7.5 #1 MPS 40 #7	g 7/10/2023 : 184
System 150 #443	
Operators (All selected) 🗨	2 120
Jobs (All selected) 🖪	MPE 7.5 #1
<b>v</b>	80 184 Items 7/10/2023 12:00:00 AM
SELECTION SUMMARY 🗹 Automatic Refresh	()
66,668 Items 31 Runs	ΞĒ
Last Update: 3:29:55 PM	
	Connected (Advir)
	Connected (Admin)

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.

	Thick Stack Reason	Count 🔻	% Input	% Thick Stac
>	Thick	305	0.5	53.7%
	Thickness Change	99	0.1	17.4%
	Thickness Peak	96	0.1	16.9%
	Folded Check	68	0.1	12.0%

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

Insight Dashboard			0 🔴 🔴
File View Tools Help	Click here t	for the Reunite	s Report.
Configure Status Scanner Stats Machine S	+ tats		insight"
TIME RANGE	Report Settings		
Weekly         Image: Constraint of the state of th	Category Job Type Total Units Items Interval Daily	Favorites + × Defaul	t Print
Shift: 7:00 AM to 3:30 PM	Volume Throughput Output Jams Rejects O	Dutsorts Thick Stack Reunites	Reruns Grid Report Report Card
FILTERS	Reunite Reason Detail		
A	Reunite Reason Count	▼ % Input % Reunites	Top Reunite Reasons
Machines (3 of 15 selected) 🕤	> Gap Too Small to Extract 1,	352 0.4 30.8%	
AS3690 #988	Vacuum Held Everything	886 0.2 20.2%	
AS7200 #1623	Gap Too Small To Extract	754 0.2 17.2%	Gap Too Small to Extract
Eagle #11	Vacuum Held Nothing	459 0.1 10.5%	vacuum neid everydang
Eagle #5	Vacuum Held All	388 0.1 8.9%	Gap Too Small To Extremens
Falcon + #9636	Everything Went on Content Path	375 0.1 8.6%	Vacuum Held Nothing
FalconV #9425	All To Content Path	169 0.0 3.9%	
FalconV+ #9702			
Gemini #9862	Reunite Rate	Reunite Reasons to Track A	Reunite Reasons
Model 51 #15794	loh	Pounito Count	
Model 60 #12345		Reunite Count	
Model /2 #23453	1 400 (3)		7/14/2023 Applications
MPS 40 #7	SE THE		Applications + 43 Remittance
System 150 #443	E 1,200		Damittance 1 70 Tax Forms
Operators (All selected)			White Mail
John (All selected)	5 800		Tax Forms : 131
V V V	Ŭ 600		White Mail : 182
SELECTION SUMMARY Automatic Refresh	400		
202 141 Items 00 Duns	ਹੋ <sub>200</sub>		
Joz, 1411 Lems 90 Kuns	<i>∝</i>		White Mail
Last opdate, 3,39,30 PM			182 Items
			7/14/2023 12:00:00 AM
			Connected (Admin)

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

🍗 Insight Dashboard	00
File View Tools Help	Click here for the Reruns Report.
Configure Status Scanner Stats Machine S	Stats
TIME RANGE	Report Settings
Weekly	Category Machine Type Total Export
From:         Sunday, July 9, 2023 12:00 AM           To:         Saturday, July 15, 2023 11:59 PM	Units Items V Interval Daily V Favorites + X Default V Print
Shift: All Shifts	Throughput Output Jams Rejects Outsorts Thick Stack Reunites Reruns Grid Report Report Card
FILTERS	Rerun Reason Detail
A	Rerun Reason Count V % Input % Reruns Top Rerun Reasons
Falcon + #9636	> Too Short 4,444 1.1 56.8%
FalconV #9425	Too Long 1,672 0.4 21.4%
Gemini #9862	Transport Gap 956 0.2 12.2%
Model 51 #15794	Feed Gap 748 0.2 9.6%
Model 60 #12345	Too Litersont Gap
Model 72 #23453	$\ (2)\ $
MPE 7.5 #1	
System 150 #443	Rerun Rate Rerun Reasons to Track All Rerun Reasons
Operators (All selected) 🗨	Mashina Dawa Caunt
Jobs (All selected) 🕤	
Applications	MPS 40 #7
Remittance	2.000 7/10/2023 : 2217
Tax Forms	
White Mail	<u> </u>
Advanced (All Selected) 🤇	5
	<u>8</u> 1,000
SELECTION SUMMARY Automatic Refresh	MPS 40 #7
391,781 Items 36 Runs	2,217 Hems 7/10/2023 12:00:00 AM
Last Update: 9:01:35 AM	
	Connected (Admir

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

	Rerun Reason	Count 🔻	% Input	% Reruns
>	Too Short	4,444	1.1	56.8%
	Too Long	1,672	0.4	21.4%
	Transport Gap	956	0.2	12.2%
	Feed Gap	748	0.2	9.6%

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).

Report Settings						
Category Job Units Items	Sub-Ca	tegory Time Range nterval Weekly	Favorite	es + × Default		Export Print
Volume Throughput Output Jams Rejects Outsorts Thick Stack Reunites Reruns Grid Report Report Card						
		Grand Total				
Job 🔺	Time Range 🔺	Grand Total Input	Throughput	Wall Clock Rate	Run Time	Jam Time
Job 🔺	Time Range 🔺	Grand Total Input 957,415	Throughput 5,805	Wall Clock Rate 5,345	Run Time 156:43:32	Jam Time 8:12:08
Job  Applications Applications	Time Range 🔺	Grand Total Input 957,415 736,723	Throughput 5,805 4,403	Wall Clock Rate 5,345 4,050	Run Time 156:43:32 160:31:30	Jam Time 8:12:08 6:48:24
Job  Applications  Applications  Tax Forms	Time Range 🔺	Grand Total Input 957,415 736,723 1,239,888	Throughput 5,805 4,403 6,786	Wall Clock Rate 5,345 4,050 6,249	Run Time 156:43:32 160:31:30 173:08:34	Jam Time 8:12:08 6:48:24 9:33:30
Job  Applications Applications Remittance Tax Forms White Mail	Time Range 🔺	Grand Total Input 957,415 736,723 1,239,888 462,977	Throughput 5,805 4,403 6,786 2,871	Wall Clock Rate 5,345 4,050 6,249 2,639	Run Time 156:43:32 160:31:30 173:08:34 156:17:35	Jam Time 8:12:08 6:48:24 9:33:30 4:58:24

Figure 4-107: Category and Sub-Category

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

Category	Sub-Category
Operator	<ul><li>Machine</li><li>Job</li></ul>
	Time Range
	Operator
Machine	• Job
	Time Range
	Operator
Job	Machine
	Time Range
	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.

Configure Status Scanner Stats	+ Stats									<sup>ex</sup> sight" `
TIME RANGE	Report Settings									
Monthly         Image: Constraint of the second	Category Indivi Units Items	idual Run 💌	Ty Interv	val Daily		Favorites +	× Default			Export Print
Shift: 8:00 AM to 4:00 PM	Throughput	Output Jan	ns Rejects	Outsorts	Thick Stack	Reunites	Reruns	id Report	Report Card	$\dashrightarrow  \bullet  \bullet$
FILTERS	Job Name	Operator	Start Time	End Time	Input	Throughput	Wallclock	Run Time	Jam Time	Output
Machines (All selected) 🔾	> Tax Forms	Jeff Albert	6/28/2024	6/28/2024	2,888	2,795	2,569	1:00:00	0:02:00	2,888 🔺
Operators (All selected)	Applications	Kate Lemm	6/28/2024	6/28/2024	2,441	2,395	2,199	1:00:00	0:01:09	2,441
Tobs (All selected)	Remittance	Maria Dop	6/28/2024	6/28/2024	325	542	497	0:35:58	0:00:00	325
Advanced (All Selected)	Applications	Mike McCo	6/28/2024	6/28/2024	11,861	11,085	10,218	1:00:00	0:04:12	11,699
Auvanceu (All Scietteu)	White Mail	Nadine Sm	6/28/2024	6/28/2024	344	1,378	1,264	0:14:59	0:00:00	344
	Applications	Laura Petri	6/28/2024	6/28/2024	5,040	9,108	8,419	0:30:00	0:03:12	4,933
	Remittance	Danielle S	6/28/2024	6/28/2024	897	1,963	1,802	0:26:59	0:00:26	897
	White Mail	Mary Tyler	6/28/2024	6/28/2024	2,874	6,944	6,387	0:23:59	0:00:51	2,823
	Remittance	Bo DiBartolo	6/28/2024	6/28/2024	637	1,403	1,288	0:26:58	0:00:16	637
	Tax Forms	Eric Stevens	6/28/2024	6/28/2024	11,192	23,562	21,897	0:24:00	0:04:30	11,001
	White Mail	Nadine Sm	6/28/2024	6/28/2024	230	485	445	0:28:27	0:00:00	230
	Applications	Winston C	6/28/2024	6/28/2024	963	2,371	2,178	0:23:59	0:00:23	963
	White Mail	Maria Dop	6/28/2024	6/28/2024	187	536	492	0:20:55	0:00:00	187
	Applications	Danielle S	6/28/2024	6/28/2024	1,359	2,215	2,034	0:35:59	0:00:50	1,359
	Applications	Susan Hilton	6/28/2024	6/28/2024	1,997	3,957	3,646	0:28:29	0:01:48	1,948
	Remittance	Mary Tyler	6/28/2024	6/28/2024	4,620	9,812	9,029	0:26:59	0:01:16	4,528
	White Mail	Laura Petri	6/28/2024	6/28/2024	2,690	5,249	4,823	0:30:00	0:00:45	2,618
	Remittance	Bo DiBartolo	6/28/2024	6/28/2024	227	455	417	0:29:56	0:00:00	227
SELECTION SUMMARY 🗹 Automatic Refresh	Remittance	Jeff Albert	6/28/2024	6/28/2024	1,113	1,818	1,670	0:35:58	0:00:46	1,113
3,397,003 Items 1,332 Runs	White Mail	Eric Stevens	6/28/2024	6/28/2024	5,140	11,749	10,853	0:23:59	0:02:16	5,035
Last Update: 10:51:36 AM	White Mail	Nadine Sm	6/28/2024	6/28/2024	223	471	432	0:28:24	0:00:00	223

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.

Insight Dashboard (Production Environment)		000
File View Tools Help		•
Configure Status Scamer State Machine S	att	
	Report Settings Click here for Report Card.	
Monthly	Category Machine	Export
From: Saturday, June 1, 2024 12:00 AM To: Sunday, June 30, 2024 11:59 PM	Units Items Interval Weeky Favorites + X Default	Print
Shift: 8:00 AM to 4:00 PM	Volume Throughout Output Jams Rejects Outsorts Thick Stack Reunites Reruns	Grid Report Report Card
FILTERS		
Machines (All selected)		
Operators (All selected)		-
Jobs (All selected)	Rejects	
Advanced (All Selected)		
	AS7200 #1623 Eagl AS7200 #1623 Eagl AS7200 #1623 Eagl Falcont #9425 Syst Falcont #9425 Syst Falcont #9702 Gemini #9862	:#11 7.5 #1 ⊨m 150 #443
	Reject Detail	
	Output Group Count % Input	% Rejects
	Ioo Little Singulation         10,104         0,4%           Length Too Long         5.159         0.2%	33.8%
	Too Much Singulation 4,629 0.2%	15.5%
	Skewed Piece 2,547 0.1%	8.5%
	Unable to Process Content MICR Data 1.734 0.1%	5.8%
	Too Thin 1,317 0.1%	4.4%
	Gap Too Small 1,277 0.1%	4.3%
SELECTION SUMMARY 🗹 Automatic Refresh	anvalu base much nepurci 633 0.076	2:170
3.397.003 Items 1.332 Runs		:
Last Update: 3:42:28 PM	Page 4 of 4	81% - +
		Connected (Admin)

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.
- Use the Save As type drop-down to select the file format as either CSV or XML.
- 5. Click the Save button.

	lp		(F				0057
Configure Status Se	canner Stats Machine St	ats	EX	port D	utton	< <	insight"
TIME RANGE		Report Settings					
Monthly From: Saturday, June 1, 2 To: Sunday, June 30, 20	C > 024 12:00 AM 024 11:59 PM	Category Machine Units Items	Type Total Interval Weekly	T Fav	orites + × Default		Export Print
Shift: 8:00 AM to 4:00 PM	嘴 Save As						×
FILTERS Machines	$\leftarrow \rightarrow ~ \checkmark ~ \uparrow$	This PC > OS (C:) >	Reports		~ C	Search Reports	Q
Operators	Organize 🔻 New f	older					≣ - 🕜
	> 🚞 Recovery		N	lo items match vo	ur search		
indow	Reports RTC_Files Smart Comm Sols Sols Sols Sols Soltemp Solte						
vindow	RtC_Files  RtC_Files  Smart Comm  Sols  Sols  Sols  Sols  Sols  File name  Save as type: VI	lachine Volume-06-30-2024					Y

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.

Scanner Stats Mac	INS <sup>+</sup> hine Stats	Click here to print.
(All selected)	Report Settings Category Machine Type Total Units Pages Interval Weekly Volume Throughput Wallclock Runtime Page Types F Machine Through	Favorites + × Default  Page Names Grid Report Batch List Report Card Put - Pages per Hour

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.

Preview		00
File View Background	3 Click on Print Setup	· ·
Print		<b>A</b>
Print	Page Setup Window	
Send via E-Mail	Paper	
😣 Exit	Size: Letter	
	Unit: Inch	
	Width: 8.5"	
	Height: 11"	
	Page Margins	U
	Left: 1" Right: 1"	
	Top: 1" Bottom: 1"	
	4. Set up page and	
		Ŧ
4 Dans 1 of 1 Distance		
Page 1 of 1 Printing	100%	

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.

Preview	5. Click on <b>Print</b> .	)	00	•
🖳 Page Setup		Print	•	_
<ul> <li>Print</li> <li>Print</li> <li>Export Document &gt;</li> <li>Send via E-Mail &gt;</li> </ul>	Machine Throughp	Printer name: Status: Location: Comment:	I224-TW-C5840i on printserv     Preferences The printer is ready.  1224 Building in the Tech Writers Department	
S Exit	Print Settings	Document(s) in queue: Number of copies: Page range:	0 1 Collate	
	Window Window <sup>9</sup> <sup>4K</sup> <sup>0</sup> <sup>4K</sup> <sup>5</sup> <sup>5</sup> <sup>5</sup> <sup>5</sup> <sup>5</sup> <sup>5</sup> <sup>5</sup> <sup>5</sup>	Print on both sides: Paper source: Print to file: File path:	Current page Selection Pages: 1 For example, 5-12	
Page 1 of 1 Printing			100% 🖃 🛑	= +

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).

Preview		
File	View Background	
	Page Layout       ▶         ✓       Toolbar         ✓       Status Bar         Customize	Facing Continuous

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).

P:	File View Background	
	B & Color • Watermark	
Watermark	Text Watermark Picture Watermark  Text:  Direction: Forward Diagonal  Color:  Font: Verdana Size: 36  Bold Italic	
	Transparency (0-255): 50	
	Position     Page Range       In front     Image: Comparison of the second sec	
Clear All	OK Cancel	

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).

Insight Dashboard (Production Environment) I Eile View Iools Help	Click here.
■ Configure Status Scanner Stats Machine S	
TIME RANGE	Report Settings
Monthly <	Category Machine Type Total T
From: Saturday, June 1, 2024 12:00 AM To: Sunday, June 30, 2024 11:59 PM	Units Items 💌 Interval Weekly 💌 Favorites 🔸 🗙 Default 💌 Print
Shift: 8:00 AM to 4:00 PM	Volume Throughput Output Jams Rejects Outsorts Thick Stack Reunites Reruns Grid Report Card
FILTERS	
Machines (All selected) 🗨	
Operators (All selected) 🗨	

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).

XLSX Export Op	XLSX Export Options	
Export mode:	Single file	
Page range:		
Sheet name:	Sheet	
Text export mo	de: Je	
Show grid lin	nes	
Export hype	Export hyperlinks	
🗌 Raw data m	ode	
	OK Cancel	

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.
- 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.

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: Jam Rate = <u>Jams</u> 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: 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: Output Rate = $\frac{Output * 3600}{Active Job Time (seconds)}$
Jam Clear Time	Average time the machine was halted while the Operator was clearing a jam. The formula for the Jam Clear Time is: Jam Clear Time (seconds) = $Jam Time (seconds)$ Jams

Table 5-1: Overall System Performance Measures terms

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

Term	Definition
	Number of pieces fed into the machine per hour. The
	formula for the Reference Feed Rate is:
Reference	Reference Feed Rate =
Feed Rate	Input *3600
	Run Time (seconds) + (Jams * 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: Reference Output Rate = Output *3600 Run Time (seconds) + (Jams * 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	<ul> <li>Time the machine was either actively running or was halted due to a jam. Active Job Time is broken down by:</li> <li>Run Time</li> <li>Jam Time</li> </ul>
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 <b>No</b> 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: Jam Rate = <u>Jams</u> 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.

#### **Machine Statistics Definitions**

Feed Rate	Number of envelopes per hour the machine is currently feeding. The formula for the Feed Rate is: 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: Output Rate = Output * 3600 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: Jam Clear time = $\frac{Jam Time}{Tams}$
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: Reference Feed Rate = Input *3600 Run Time (seconds) + (Jams * 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: Reference Output Rate = Output *3600 Run Time (seconds) + (Jams * 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	<ul> <li>Amount of time the machine was either actively running or halted due to a jam. Active Job Time is further broken down into:</li> <li>Run Time: the time spent processing mail</li> <li>Jam Time: the total time the system was halted for a jam</li> </ul>
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).

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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).

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Figure 6-5: Examples of dropping the toolbar

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

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Active       Falcon #5       Danielle Smith       Tax Ference         Inactive       Falcon #5       Bo Dilactolo       White1         Inactive       AS3690i #1       Judy Mulberry       Applica         File       View       Tools       Help       S0       100       3,829 pages/hr         Inactive       AS3690i #1       Judy Mulberry       Applica       File       View       Tools       Help       25       50       2,000 pages/hr         Server Alarms		Active	A57200i	#2	Winston Church	Remit Main menu		120	2.52.00	100	200	3,636 p	ages/hr	
Inactive       Palcon+#/       Bo bleartolo       White in the inactive       So       100       3,829 pages/hr         Inactive       AS3690i #1       Judy Mulberry       Applica       File       View       Tools       Help       25       50       2,000 pages/hr         Server Alarms		Active	Falcon #	5	Danielle Smith	Tax Fo	Main	menu			12	25	2,647 p	ages/hr
Inactive     AS3690i #1     Judy Mulberry     Applica     Control of the treat of		Inactive Faicon+ #7 Bo DiBarto			Bo DiBartoio	white i	File	View	Tools	Help	50	100	3,829 pa	ges/nr
Server Alarms     Advnowledged By     Adv       Time     Level     Event     Advnowledged By     Adv		Inactive	AS3690i #	#1	Judy Mulberry	Applica				p	25	50	2,000 pa	ges/hr
Time Level Event Acknowledged By Ack		Server Alarms												
	Ī	Time		Level	Event								Acknowledged By	Ack

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

	Insight D <u>ash</u>	board (Produc <u>tion E</u>	Environment)						
	File View	Tools Help							
		(3) (5)							
۰.	Configure S	tatus Scanner Stats	Machine Stats						🛛 🌄 insight"
	Overview Sci	anner Status Machin	e Status   Server Activ	ity Alarms					
	Server Status			ity ridinis					
	Server Server Server Memor	is running normally. Version: v8.2.8.0 (Pro Uptime: 08:19 y Usage: 16,948 K	duction Environment)						
	Scanner Activit	ty							
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throughput
	> Active	AS7200i #2	Laura Petri	Remittance	02012265	4:22 PM	50	100	1,836 pages/hr
	Active	Falcon #5	Bo DiBartolo	Remittance	03012266	4:22 PM	12	25	4,090 pages/hr
	Active	FalconV #6	Bo DiBartolo	Applications	04012264	4:21 PM	100	200	1,945 pages/hr
	Active	Falcon+ #7	Mary Tyler	Remittance	05012262	4:20 PM	25	50	3,461 pages/hr
	Active	Gemini #9	Mary Tyler	Applications	06012263	4:20 PM	50	100	1,988 pages/hr
	Inactive	AS3690i #1	Judy Mulberry	Applications	01012208	2:09 PM	25	50	2.000 pages/hr
	Server Alarms								
1	Time	Level	Event					Ad	knowledged By Ack
									Connected (Admin

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.

	Insight Dash	board (	Production En	vironment)				
	File View	Tools	Help					
	0	0	Show Ever	nt Log C	trl+Alt+D			
	Configure	Status	Contact N View Licer	lavro Support Ci nse Counts	trl+Alt+H			
S	erver Status	canner (	About Insi	ight Dashboard				
S	Serve Serve Serve Memo	r is runni r Version r Uptime ry Usage	ng normally. 1: v8.2.8.0 (Prod : 01:20 2: 16,896 K	Help Menu	)			
	Status	Mad	chine	Operator	Job	Batch Id	Last Activity	Tran
3	Active	AS7200i #2 Mary Tyler White Ma		White Mail	02012061	9:23 AM	25	
	Active	Fal	con #5	Mary Tyler	Remittance	03012060	9:21 AM	25
	Active	Fal	conV+ #8	Danielle Smith	White Mail	06012059	9:19 AM	2
	Active	Fal	con+ #7	Nadine Smykowski	Applications	05012057	9:18 AM	50
	Active	Ger	mini #9	Kate Lemmon	White Mail	07012058	9:18 AM	100
	Idle	Fal	conV #6	Jeff Albertson	Tax Forms	04012039	8:55 AM	2

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.

File View Iools Help											
Configure Status Scanner Stats Machine Stats											
0	verview	Scanner Stat	tus Machine	Status Server Activ	rity Alarms						
	and the Charles the	· · ·		-							
Se	Serve Serve Serve Memo	er is er V er U ory L	Click I	nere for	Add or the to	r <b>Remo</b> v oolbar.	/e Butto	ons on			
Se	Serve Serve Serve Memo	er is er V er U ory L ty	Click ł	nere for	Add or the to	<b>Remo</b> volbar.	/e Butto	ons on	)		
Se	Serve Serve Serve Memo	er is er V er U ory U ty Machir			Add or the to	r <b>Remo</b> v Dolbar.	/e Butto	DNS ON	Pages	Throughput	
See	Server Server Server Server Memo Status Status Active	er is er V er U try Machir Falcor	ne ne	Operator Winston Church	Add or the to	oolbar.	Last Activity 11:31 AM	Transactions	Pages 25	Throughput 4,500 pages/hr	

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).

sight Dashboard (Producti	on Environment)	_		_		_	00
le View Tools Help							
Click and dra	g a column h	eading. )					OPEX
onfigure Status Scanne	r Stats Machine Stats						insight"
rview Scanner Status	Machine Status Server Ac	tiyity Alarms					
Status Machine	P Operator Machine	Job	Batch Id	Last Activity	Transactions	Pages	Throughput
Active Falcon+ #7	Judy Mulberry	Remittance	05012258	1:37 PM	50	100	3,428 pages/hr
Active FalconV+ #8	Mary Tyler	Tax Forms	06012259	1:37 PM	100	200	5,106 pages/hr
Active Gemini #9	Mary Tyler	Tax Forms	07012260	1:37 PM	100	200	2,345 pages/hr
Active FalconV #6	Winston Church	Tax Forms	04012257	1:36 PM	50	100	5,373 pages/hr
Active A57200i #2	Jonas Grumby	Tax Forms	02012256	1:34 PM	2	5	2,250 pages/hr
dle Falcon #5	Bo DiBartolo	Applications	03012222	12:57 PM	25	50	5,142 pages/hr
	Nadine Smykowski	Applications	01012261	11:59 AM	50	100	2.571 pages/hr

Figure 6-12: Moving a column

-	Insight Dashb	oard (Production Er	nvironment)						0 0 0
=	File View Configure	Tools Help	New L	ocation	of the co	olumn			
	Overview Sca	Operator	Machina	Alarms	Patch Id	Loot Activity	Transactions	Pages	Throughout
	> Active	Eric Stevens	A57200i #2	White Mail	02012266	1:44 PM	100	200	2,599 pages/hr
	Active	Judy Mulberry	Falcon+ #7	Remittance	05012263	1:43 PM	50	100	2,057 pages/hr
	Active	Susan Hilton	FalconV+ #8	Applications	06012264	1:43 PM	25	50	2,769 pages/hr
	Active	Eric Stevens	Gemini #9	Applications	07012265	1:43 PM	5	10	3,272 pages/hr
	Active	Susan Hilton	FalconV #6	Tax Forms	04012262	1:41 PM	50	100	4,000 pages/hr
	Idle	Bo DiBartolo	Falcon #5	Applications	03012222	12:57 PM	25	50	5,142 pages/hr
	Inactive	Nadine Smykowski	AS3690i #1	Applications	01012261	11:59 AM	50	100	2,571 pages/hr

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).

	0,	0	<b>(</b>	Click and drag th	e column boundar	<i>y</i> .
	Configure	Status	Scanner Stats	Machine Stats		
C	Overview S	canner St	atus Machine	Status Server Act	Vity Alarms	
	Status	Machi	ne	Operator 4	+30b ▲	Batch
	Active	Falco	nV+ #8	Maria Doppler	Applications	0601
	Active AS7		00i #2	Bo DiBartolo	Remittance	0201
	Inactive	AS369	0i #1	Bo DiBartolo	Tax Forms	01012
	Idle Falc		nV #6	Mike McCormick	Tax Forms	0401
	Active	Gemi	ni #9	Danielle Smith	Tax Forms	0701
	Active	Falco	n+ #7	Kate Lemmon	White Mail	0501
>	Active	Falco	n #5	Nadine Smykowski	i White Mail	0301

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).

Sc	anner Activity	у		Sc	anner Activity		
	Status	Machine 📐 🔺	Operat		Status	Machine 🛛	Operat
	Inactive	AS3690i #1	Jonas G		Active	Gemini #9	Mary 1
	Active	A57200i #2	Mary 1		Idle	FalconV+ #8	Judy M
	Active	Falcon #5	Susan		Active	FalconV #6	Daniel
	Idle	Falcon+ #7	Eric St		Active	Falcon+ # 7	Eric St
>	Active	FalconV #6	Kate L	>	Active	Falcon #5	Bo DiB
	Active	FalconV+ #8	Maria		Active	A572 J0i #2	Maria
	Active	Indicates sorting in ascending orde	aniel r.		Inact India in des	cates sorting scending order.	Susan H

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).

	Status	Machine	Operator	Job	Batch Id	Last Activity	Tr
1	Idle	FalconV #6	Mary Tyler	Tax Forms	04012296	1:59 PM	10
1	Inactive	AS3690i #1	Maria Doppler	Tax Forms	01012309	12:55 PM	50
1	Active	A57200i #2	Jeff Albertson	Tax Forms	02012325	2:32 PM	25
1	Active	Falcon #5	George Anderson	White Mail	03012328	2:36 PM	2
	Active	FalconV+ #8	Mary Tyler	Tax Forms	06012329	2:37 PM	50
1	Active	Falcon+ #7	Nadine Smykowski	White Mail	05012330	2:38 PM	10
	Active	Gemini #9	George Anderson	Applications	07012331	2:38 PM	50

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).

	Memor	ry Usage: 15,924 K					
Sca	anner Activit	у	¥	Sorting icor			
	Status	Machine	Ó	Operator	Job	Ba	
>	Active	ive Falcon #5 🕅		Laura Petri	Remittance	03	
	Active	A57200i #2		Maria Doppler	Tax Forms	02	
	Active	FalconV+ #8		Winston Church	Remittance	06	
	Active	Falcon+ #7		Judy Mulberry	Remittance	05	
	Activo	Comini #0		Fric Stovons	White Mail	07	

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.

	Status	Machine	Operator	Job	Batch Id	Last Activity	Tra
	Active	Gemini #9	Values Text Filters		012388	3:45 PM	50
>	Active	Falcon #5			012389	3:46 PM	50
	Active	FalconV+ #8	Enter text to search	*	012386	3:44 PM	25
	Idle	Falcon+ #7	(All)		012346	2:56 PM	2
	Active	Select	AS3690i #1	$\sim$	012387	3:45 PM	10
×	Machine	In Falcon #5, Falcor	<ul> <li>✓ Falcon #5</li> <li>✓ Falcon+ #7</li> <li>✓ FalconV #6</li> <li>✓ FalconV+ #8</li> <li>✓ Gemini #9</li> </ul>	or type the	e exact tex	t.	
	THIC		Clear Filter	Clos			

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).

Values Text Filters Click on Text Filters.
Begins With
Enter a value
Clear Filter Close
1.

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.

Values Text Filters          Begins With         Equals         Does Not Equal         Begins With         Ends With         Contains         Does Not Contain         Is Blank         Is Not Blank         Custom Filter	<ul> <li>2. Click on the drop-down arrow.</li> <li>3. Select a text filter.</li> </ul>
Clear Filter Close Values Text Filters Begins With Falcon	— 4. Enter text.
Clear Filter Close	

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:

Custom F	ilter	•	
First Second	Begins With Falcon And Or Does Not End With 5		Optionally, — you can use a custom filter.
Clear Fi	lter	Close	

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.

Idle	raicon+ #/	Enc Stevens	Applications	05012540							
Active	FalconV #6	Mike McCormick	White Mail	04012387							
a. Click here to clear the filter.											
	b. Use this check box to toggle the filter on and off.										
X Machin	ne In Falcon #5, Falco	n+ #7, FalconV #6, Falcon	V + #8, Gemini #9								

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.

Act	ive	Gemini #9	Bo DiBartolo	Applications	07012418	4:21 P
	(	5. Click the expand	drop-down arrov the filter history.	v to		
Server , Tim	Machine Machine Machine Machine Machine Machine Machine Machine	In Falcon #5, Falco In Falcon #5, Falco In Falcon #5, Falco In Falcon #5, Falco = Falcon #5 In Falcon + #7, Fak Starts with Falco Starts with Falco Starts with Falco Starts with Falc	n+ #7, FalconV #6, Falcon n+ #7, FalconV #6, Falcon n+ #7, FalconV #6 n+ #7 conV #6, FalconV+ #8, G	onV+ #8, Gemini #9 onV+ #8 emini #9 6.	Select a prev	vious s.

#### 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).

-	Insight Pool	Right-clic	ck a colum	nn hea	din	g					000
=	Configure	Status Scanner Sta	<b>DNS</b> <sup>+</sup> ats Machine Stats				and	click <b>Sort</b>	Sort Desc	Ascendi ending	ng or
0	verview	Scanner Status Mach	nine Status Server Activ	vity Alarms							
	Status	Machine	Operator	Job	AL	C			nsactions	Pages	Throughput
>	Active	FalconV+ #8	Winston Church	White Mail	z+	Soft Asce	ending			100	4,931 pages/hr
	Active	Gemini #9	Susan Hilton	White Mail	z	Sort Dec	ending			25	2,142 pages/hr
	Active	Faicon #5	Maria Doppier	Applications	A+	JUILDES	enuing			5	3,600 pages/nr
	Active	AS/2001#2	Re DiPartele	White Mail	· _ ·			00000		50	2,022 pages/lir
	Active	FalconV #6	Nadine Smykowski	Tax Forms	۰.	Group By	This Colun	nn	1	200	2 236 pages/hr
	Inactive	AS3690i #1	Mike McCormick	Tax Forms	1	Show Gr	Dup Du Dov			100	3.870 pages/hr
					+A+ <b>Y</b>	Hide This Column Best Fit Best Fit ( Filter Edi Show Fir Show Au	s Column Chooser all columns; tor d Panel to Filter Rov	)			
											Connected (Admin)

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).

	Insight R	ight-click	the colu	mn hea	adi	ng			•
	Configure S	itatus Scanner Stat	■NS <sup>+</sup> s Machine Stats			and cl	ick <mark>Sort</mark>	Ascen	ding.
C	verview Sca	anner Status Machir	e Status Server Activ	vity Alarms					
	Status	Machine	Operator	Job			ransactions	Pages	Throughput
>	Active	AS7200i #2	Bo DiBartolo	White Mail	z↓	Sort Ascending	0	100	5,373 pages/hr
	Active	Gemini #9	Mary Tyler	Applications	ZI	6 · 0 · 1	0	100	5,217 pages/hr
	Active	Falcon #5	Laura Petri	Remittance	A+	Sort Descending		5	3,600 pages/hr
	Active	Falcon+ #7	Nadine Smykowski	Tax Forms		Clear Section	2	25	3,214 pages/hr
	Active	FalconV #6	Mary Tyler	Remittance		Clear Sorting	2	25	3,000 pages/hr
	Idle	FalconV+ #8	Laura Petri	White Mail		Clear All Sorting	5	50	5,454 pages/hr
	Inactive	AS3690i #1	Bo DiBartolo	Remittance	1	Clear An Sorting	D	100	4, 186 pages/hr
					[]] 4	Group By This Column Show Group By Box			

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

TISIGITE Da	shboard (Production	Environment 1						
File View	v Tools Help	Ascending	j alphabe	etical or	der.			
0	<b>Q</b>	⊡NS⁺						OPEX
Configure	Status Scanner St	tats Machine Stats						📲 insight"
Overview	Scanner Status Mac	hine Status Server Activ	vity Alar ns					
Status	Machine	Operator	Job 🔺	Batch Id	Last Activity	Transactions	Pages	Throughput
Active	Gemini #9	Mary Tyler	Applications	07012313	4:15 PM	50	100	5,217 pages/hr
Active	Falcon #5	Laura Petri	Remittance	03012310	4:13 PM	2	5	3,600 pages/hr
Active	FalconV #6	Mary Tyler	Remittance	04012309	4:12 PM	12	25	3,000 pages/hr
Inactive	AS3690i #1	Bo DiBartolo	Remittance	01012294	2:02 PM	50	100	4, 186 pages/hr
Active	Falcon+ #7	Nadine Smykowski	Tax Forms	05012311	4:13 PM	12	25	3,214 pages/hr
Activo	A57200i #2	Bo DiBartolo	White Mail	02012312	4:15 PM	50	100	5,373 pages/hr
Active								

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).

Statu	us	Machine	Operator	Job 🔺	Batch Id	Last A 9	uitu.	Transactions	Pages	Throughpu
Activ	ve	Gemini #9	Mary Tyler	Applications	07012313	4:15.71	Sort Ascer	iding	100	5,217 pag
Activ	ve	Falcon #5	Laura Petri	Remittance	03012310	4:13 PI	Sort Desce	ending	5	3,600 pag
Activ	ve	FalconV #6	Mary Tyler	Remittance	04012309	4:12 PI	Clear All S	orting	25	3,000 pag
Inacti	tive	AS3690i #1	Bo DiBartolo	Remittance	01012294	2:02 PM	Group By	This Column	100	4, 186 page
Activ	ve	Falcon+ #7	Nadine Smykowski	Tax Forms	05012311	4:13 PI	Show Grou	up By Box	25	3,214 pag
> Activ	ve	AS7200i #2	Bo DiBartolo	White Mail	02012312	4:15 PI	LUCIE THE	Call and	100	5,373 pag
Idle		FalconV+ #8	Laura Petri	White Mail	06012296	3.57 PI	Hide Inis	Column	50	5,454 pag
			Clic	ck Sort A	scending	<b>]</b> . ).	<ul> <li>Best Fit</li> <li>Best Fit (al</li> <li>Filter Editor</li> <li>Show Find</li> <li>Show Autor</li> </ul>	I columns) pr Panel p Filter Row		

Figure 6-30: Sorting Last Activity in ascending order

	Configure St	tatus Scanner Stats	Machi Eac	h Job is n	iow in as	cending ti	me order.		ins
	Status	Machine	Operator	Job 🔺	Batch Id	Last Activity 🔺	Transactions	Pages 9	Throughp
	Active	Gemini #9	Mary Tyler	Applications	07012313	4:15 PM	50	100	5,217 pa
	Inactive	AS3690i #1	Bo DiBartolo	Remittance	01012294	2:02 PM	50	100	4, 186 pag
	Active	Falcon #5	Laura Petri	Remittance	03012310	4:13 PM	2	5	3,600 pa
	Active	Falcon+ #7	Nadine Smykowski	Tax Forms	05012311	4:13 PM	12	25	3,214 pa
>	Active	FalconV #6	Nadine Smykowski	Tax Forms	04012314	4:17 PM	100	200	3,171 pa
	Idle	FalconV+ #8	Laura Petri	White Mail	06012296	3:57 PM	25	50	5,454 pa
	Active	A57200i #2	Bo DiBartolo	White Mail	02012312	4:15 PM	50	100	5,373 pa

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).

 Со	nfigure St	atus Scanner Stat	uno s Machine Stats	Clic	k ł	nere.					ins
Over	view Scar	nner Status Machir	ne Status Server Ad	tivity Alarms			$\rightarrow$				
St	tatus	Machine	Operator	Job		Batch Id	Last Activity	/ <u>A</u>	Transactions	Pages	9 Throughp
A	ctive	Gemini #9	Mary Tyler	Applications		07012313	4:15 PM	2.	Sort Ascending		5,217 pa
In	active	AS3690i #1	Bo DiBartolo	Remittance		01012294	2:02 PM	Z.	Sort Descending		4, 186 pag
A	ctive	Falcon #5	Laura Petri	Remittance		03012310	4:13 PM		Class Casting		3,600 pa
A	ctive	Falcon+ #7	Nadine Smykows	ki Tax Forms		05012311	4:13 PM		Clear Sorting		3,214 pa
> A	ctive	FalconV #6	Nadine Smykows	ki Tax Forms		04012314	4:17 PM		Clear All Sorting		3,171 pa
Id	lle	FalconV+ #8	Laura Petri	White Mail		06012296	3:57 PM				5,454 pa
A	ctive	A57200i #2	Bo DiBartolo	White Mail		02012312	4:15 PM		Group By This C	olumn	5,373 pa
								4	Show Group By	Box	
					F	Result:		₹ +A+	Column Choose Best Fit Best Fit (all colum Filter Editor Show Find Pane Show Auto Filter	r mns) I r Row	
insig	<b>Jol</b> alp	<b>bs</b> are sti habetical	ill in asce I order.	nding			Last A no lon	<b>Acti</b> iger	<b>vity</b> time in ascer	s are iding	e order.
Con	figure Stat	us Scanner Stats	Machine Stats								insight" *
Overv	iew Scann	er Status Machine St	tatus Server Activity	Alarms							
Sta	tus M	lachine 0	perator Jo	b 🔺	Batch	Id La	st Activity	Transactio	ons Pages		Throughput
Act	tive G	emini #9 M	lary Tyler Ap	plications	0701	2313 4:1	15 PM	50	100		5,217 pages/hr
Act	tive Fa	alcon #5 D	anielle Smith Re	mittance	0301	2315 4:1	18 PM	12	25		3,214 pages/hr
Ina	ctive A:	S3690i #1 Bo	DiBartolo Re	mittance	01012	294 2:0	2 PM	50	100		4,186 pages/hr
Act	tive Fa	alconV #6 N	adine Smykov 👫 Ta	x Forms	0401	2314 4:1	17 PM	100	200		3,171 pages/hr
> Ac	tive Fa	alcon+ #7 D	anielle Smith W	hite Mail	0501	2316 4:1	19 PM	50	100		1,988 pages/hr
Ac	tive A	57200i #2 B	o DiBartolo 🛛 🛛 🛛	hite Mail	0201	2312 4:1	15 PM	50	100		5,373 pages/hr

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).

Status         Machine           dhine	Status Server Activi Operator Mary Tyler Bo DiBartolo I Laura Petri Nadine Smykowski Nadine Smykowski Laura Petri Bo DiBartolo I	ity Alarms Job Applications Remittance Remittance Tax Forms White Mail White Mail	Batch Id 07012313 01012294 03012310 05012311 04012314 06012296 02012312	4:15 PM 4:13 PM 4:13 PM 4:13 PM 4:17 PM 3:57 PM 4:15 PM	<ul> <li>Sort Ascending</li> <li>Sort Descending Clear Sorting</li> <li>Clear Sorting</li> <li>Clear All Sorting</li> <li>Group By This Column</li> <li>Show Group By Box</li> <li>Hide This Column</li> <li>Column Chooser</li> <li>Best Fit Best Fit (all columns)</li> <li>Filter Editor</li> <li>Show Find Panel</li> </ul>		Through 5,5,217 p 4,186 pa 3,600 p 3,214 p 3,171 p 5,454 p 5,454 p					
mini #9       6901 #1       1       con #5       1       con #7       1       conV #6       1       conV+ #8       1       200i #2	Operator Mary Tyler Bo DiBartolo ILaura Petri ILaura Petri Bo DiBartolo	Job Applications Remittance Remittance Tax Forms White Mail White Mail	Batch Id 07012313 01012294 03012310 05012311 04012314 06012296 02012312	4:13 PM 4:13 PM 4:13 PM 4:13 PM 4:17 PM 3:57 PM 4:15 PM	<ul> <li>Sort Ascending</li> <li>Sort Descending Clear Sorting</li> <li>Clear Sorting</li> <li>Clear All Sorting</li> <li>Group By This Column</li> <li>Show Group By Box</li> <li>Hide This Column</li> <li>Column Chooser</li> <li>Best Fit</li> <li>Best Fit (all columns)</li> <li>Filter Editor</li> <li>Show Find Panel</li> </ul>		Through 5,217 ¢ 4,186 pi 3,214 ¢ 3,214 ¢ 5,454 p 5,454 p 5,373 ¢					
nini #9 690i #1 i con #5 i con #7 i con V #6 i con V # 8 i '200i #2 i	Mary Tyler A Bo DiBartolo I Laura Petri Nadine Smykowski Nadine Smykowski Laura Petri Bo DiBartolo I	Applications Remittance Remittance Tax Forms Tax Forms White Mail White Mail	07012313 01012294 03012310 05012311 04012314 06012296 02012312	4:15 PM 2:02 PM 4:13 PM 4:13 PM 4:17 PM 3:57 PM 4:15 PM	<ul> <li>Sort Ascending</li> <li>Sort Descending</li> <li>Clear Sorting</li> <li>Clear All Sorting</li> <li>Group By This Column</li> <li>Show Group By Box</li> <li>Hide This Column</li> <li>Column Chooser</li> <li>Best Fit Best Fit (all columns)</li> <li>Filter Editor</li> <li>Show Find Panel</li> </ul>		5,217 p 4,186 p 3,600 p 3,214 p 3,171 p 5,454 p 5,373 p					
690i #1 i con #5 i con + #7 i con V #6 i con V + #8 i 200i #2 i	Bo DiBartolo	Remittance Remittance Tax Forms Tax Forms White Mail White Mail	01012294 03012310 05012311 04012314 06012296 02012312	2:02 PM 4:13 PM 4:13 PM 4:17 PM 3:57 PM 4:15 PM	<ul> <li>Sort Descending Clear Sorting</li> <li>Clear All Sorting</li> <li>Group By This Column</li> <li>Show Group By Box</li> <li>Hide This Column</li> <li>Column Chooser</li> <li>Best Fit Best Fit (all columns)</li> <li>Filter Editor</li> <li>Show Find Panel</li> </ul>		4,186 pi 3,600 r 3,214 r 3,171 r 5,454 r 5,373 r					
con #5 con+ #7 conV #6 conV + #8 /200i #2 1	Laura Petri Nadine Smykowski Nadine Smykowski Laura Petri Bo DiBartolo	Remittance Tax Forms Tax Forms White Mail White Mail	03012310 05012311 04012314 06012296 02012312	4:13 PM 4:13 PM 4:17 PM 3:57 PM 4:15 PM	Clear Sorting Clear All Sorting Group By This Column Show Group By Box Hide This Column Column Chooser Best Fit Best Fit (all columns) Filter Editor Show Find Panel		3,600 f 3,214 f 3,171 f <mark>5,454 f</mark> 5,373 f					
con+ #7 conV #6 toonV+ #8 '200i #2	Nadine Smykowski Nadine Smykowski Laura Petri Bo DiBartolo	Tax Forms Tax Forms White Mail White Mail	05012311 04012314 06012296 02012312	4:13 PM 4:17 PM 3:57 PM 4:15 PM	Clear All Sorting Group By This Column Show Group By Box Hide This Column Column Chooser Best Fit Best Fit Best Fit (all columns) Filter Editor Show Find Panel		3,214 <b>g</b> 3,171 <b>g</b> <mark>5,454 <b>g</b> 5,373 <b>g</b></mark>					
conV #6 conV+ #8 /200i #2 I	Nadine Smykowski Laura Petri Bo DiBartolo	Tax Forms White Mail White Mail	04012314 06012296 02012312	4:17 PM 3:57 PM 4:15 PM			3,171 <b>g</b> 5,454 <b>g</b> 5,373 <b>g</b>					
conV+ #8	Laura Petri Bo DiBartolo	White Mail White Mail	06012296 02012312	3:57 PM 4:15 PM	<ul> <li>Group By This Column</li> <li>Show Group By Box</li> <li>Hide This Column</li> <li>Column Chooser</li> <li>Best Fit Best Fit (all columns)</li> <li>Filter Editor</li> <li>Show Find Panel</li> </ul>		<mark>5,454 ρ</mark> 5,373 ρ					
7200i #2	Bo DiBartolo	White Mail	02012312	4:15 PM	<ul> <li>Show Group By Box</li> <li>Hide This Column</li> <li>Column Chooser</li> <li>Best Fit</li> <li>Best Fit (all columns)</li> <li>Filter Editor</li> <li>Show Find Panel</li> </ul>		5,373 p					
				•	Hide This Column Column Chooser A* Best Fit Best Fit (all columns) Filter Editor Show Find Panel							
		F	Result:		Show Auto Filter Row							
Help	Jok No Machine Stats	<b>bs</b> and <b>La</b> longer in	ast Activi ascending	i <b>ty</b> are g order.	)							
Status Machine	Status Server Acti	ivity Alarms	$\sim$				_					
chine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Th					
mini #9	Danielle Smith	Remittance	07012317	4:21 PM	25 5	50	2.					
con+ #7	Danielle Smith	White Mail	05012316	4:19 PM	50 1	100	1.9					
con #5	Danielle Smith	Remittance	03012315	4:18 PM	12 7	25	3.2					
conV #6	Nadine Smykowski	i Tax Forms	04012314	4:17 PM	100 2	200	3.1					
7200i #2	Bo DiBartolo	White Mail	02012312	4:15 PM	50 1	100	5.3					
conV+ #8	Laura Petri	White Mail	06012296	3:57 PM	25	50	5.4					
690i #1	Bo DiBartolo	Remittance	01012294	2:02 PM	50 1	100	4 1					
	Production Env Help Scanner Stats Status Machine hine hini #9 oon+ #7 oon #5 oonV #6 200i #2 conV+ #8	Production Environment Help Scanner Stats Status Machine Status Status Machine Status Server Act nine Operator nini #9 Danielle Smith on #5 Danielle Smith on #5 Danielle Smith on #6 Nadine Smykowsk 200i #2 Bo DiBartolo SonV + #8 Laura Petri S90i #1 Bo DiBartolo	Production Environment Help       Jobs and La no longer in         Scanner Stats       Machine Stats         Status       Machine Status         Server Activity       Alarms         nine       Operator         Job       Job         nini #9       Danielle Smith         Remittance       Mohine Status         con+ #7       Danielle Smith         Remittance       Tax Forms         200i #2       Bo DiBartolo         SonV+ #8       Laura Petri         Boo DiBartolo       Remittance	Production Environment         Help       Jobs and Last Activity         no longer in ascendin         Scanner Stats       Nachine Stats         Status       Machine Status         Status       Remittance       03012315         Status	Production Environment Help         Jobs and Last Activity are no longer in ascending order.         Scanner Stats         Scanner Stats         Job         Batch Id       Last Activity         Scanner Stats         Scanner Stats         Scanner Stats         Server Activity         Job       Batch Id       Last Activity         Image: Status       Server Activity         Job       Batch Id       Last Activity         Image: Status       Server Activity       Alarms         Job       Batch Id       Last Activity         Image: Status       Server Activity       Alarms         Job       Batch Id       Last Activity         Image: Status       Server Activity       Alarms         Job       Batch Id       Last Activity         Image: Status       Server Activity       Alarms         Job       D	Production Environment Help       Jobs and Last Activity are no longer in ascending order.         Scanner Stats       Scanner Stats         Scanner Stats         Status       Server Activity         Machine Status         Server Activity       Alarms         Alarms         Status       Server Activity         Machine Status       Server Activity         Job       Batch Id       Last Activity       Transactions         aini #9       Danielle Smith       Remittance       07012317       4:21 PM       25         Son ##7       Danielle Smith       Remittance       03012316       4:19 PM       50         Son ##7       Danielle Smith       Remittance       03012316       4:19 PM       100         Son ##7       Danielle Smith       Remittance       03012314       4:17 PM       100         Son DiBartolo       White Mail <th co<="" td=""><td>Production Environment Help         Jobs and Last Activity are no longer in ascending order.         Scanner Stats         Status         Server Activity         Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job       Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job       <th <="" colspan="4" td=""></th></td></th>	<td>Production Environment Help         Jobs and Last Activity are no longer in ascending order.         Scanner Stats         Status         Server Activity         Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job       Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job       <th <="" colspan="4" td=""></th></td>	Production Environment Help         Jobs and Last Activity are no longer in ascending order.         Scanner Stats         Status         Server Activity         Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job       Job       Batch Id       Last Activity       Transactions       Pages         Imit @       Operator       Job <th <="" colspan="4" td=""></th>				

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).



Figure 6-34: Menus of sorted and unsorted columns

#### 6.7.3.3. Group By This Column

To group by a table column:

 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).

-	Insight Dashb	oard (Producti	on B	Environment)			-						
	Configure S	Status Scanne	r St	<b>DNS⁺</b> ats Machine Stats									
	File View Tools Help												
C	Overview Sca	anner Status	Mad	hine Status Server Activity	Alarms								
	Status	Machine		0		Batch Id	Last Activity	Transactions					
>	Active	A57200i #2	2+	Sort Ascending	lications	02012157	4:08 PM	50					
	Active	Falcon #5	Z↓ ▲↓	Sort Descending	nittance	03012156	4:07 PM	5					
	Active	FalconV #6	B	Group By This Column	te Mail	04012155	4:06 PM	5					
	Active	Gemini #9			Forms	07012154	4:04 PM	2					
	Active	Falcon+ #7			Forms	05012153	4:03 PM	100					
	Active	FalconV+ #8			Hide This Column	nittance	06012149	3:59 PM	25				
	Inactive	AS3690i #1		Column Chooser	cations	01012123	2:00 PM	25					
		AS30901#1	Best Fit Best Fit (all columns) Filter Editor Show Find Panel Show Auto Filter Row										

Figure 6-35: Showing the Group By box

a Ir	Insight Dashboard (Production Environment)												
	0.	<b>Q</b>	<b>DNS⁺</b>						OPEX				
C	Configure	Status Scanner St	tats Machine Stats						- Insight				
F	File View Tools Help												
Ov	Overview Scanner Status Machine Status Server Activity Alarms												
Dra	Drag a column header here to group by that column Group By box												
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throughput				
>	Active	Falcon #5	Eric Stevens	Remittance	03012165	4:17 PM	50	100	4,615 pages/hr				
	Active	FalconV #6	Eric Stevens	Tax Forms	04012163	4:16 PM	50	100	3,428 pages/hr				
	Active	Gemini #9	Susan Hilton	Applications	07012164	4:16 PM	50	100	3,243 pages/hr				
	Active	Falcon+ #7	Kate Lemmon	White Mail	05012162	4:15 PM	50	100	4,044 pages/hr				
	Active	A57200i #2	George Anderson	Applications	02012157	4:08 PM	50	100	4,000 pages/hr				

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.

Configure	Status	Scanner Stats	DNS <sup>+</sup> Machine Stats				•	
Overview	Scanner St	atus Machine	Status Server Activ	vity Alarms				
Status 🔺				Group by	<b>y</b> box			م
Machine		Operator	Job	▲ Batch Id	Last Activity	Transactions	Pages	Throughput
<ul> <li>Status</li> <li>Status</li> <li>Status</li> </ul>	s: Active s: Idle s: Inactiv	e	Column are gr	heading you rouping by				

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

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

"	<u>C</u> on	figure <u>S</u> tatus	Scanner Stats Machin	e Stats				
0	verv	iew Scanner St	atus Machine Status	Server Activity Alarms	s			
	Statu	IS 🔺						
	Ма	chine	Operator	Job 🔺	Batch Id	Last Activity	Transactions	Pages
>		Status: Active						
		A57200i #2	George Anderson	Remittance	02012363	3:33 PM	25	50
		FalconV #6	Mary Tyler	White Mail	04012365	3:36 PM	12	25
		Falcon #5	Mike McCormick	Applications	03012366	3:37 PM	2	5
		FalconV+ #8	Mike McCormick	White Mail	06012367	3:38 PM	100	200
		Gemini #9	Susan Hilton	Tax Forms	07012368	3:39 PM	25	50
	+	Status: Idle						
	+	Status: Inactiv	e					

Figure 6-38: Expanding and contracting groups

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

 Co	nfigure	Status     Scanner Stats     Material		<b>S⁺</b> e Stats					
Over	view	canner Status Machine Stat	s	Server Activity Alarms	]				
Stat	tus 🔺	Full Expand							Q
Ma	achine ‡	Full Collapse		Job 🔺	Batch Id	Last Activity	Transactions	Pages	Throughput
E	Stat	Sort Ascending	'n	Remittance	02012363	3:33 PM	25	50	1,836 pages/hr
	Falc	Sort Descending		White Mail	04012365	3:36 PM	12	25	5,625 pages/hr
	Falo	Clear All Sorting	•	Applications	03012366	3:37 PM	2	5	4,500 pages/hr
	Falo			White Mail	06012367	3:38 PM	100	200	4,705 pages/hr
>	Gen	UnGroup		Tax Forms	07012368	3:39 PM	25	50	3,000 pages/hr
(±	Stat 4	Hide Group By Box							
(±	Stat	Hide This Column							
		Column Chooser							
		Rest Fit (all columns)							
		best file (all columns)							
	<b>T</b>	Filter Editor							
		Show Find Panel							
		Show Auto Filter Row							

Figure 6-39: Selecting Ungroup

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

	Configure	Status Scanner Sta	<b>DNS</b> <sup>+</sup> ats Machine Stats				_	¢,				
1	Overview Scanner Status Machine Status Server Activity Alarms											
	Drag a column header here to group by that column											
	Status	Machine	Operator	Job 🔺	Batch Id	Last Activity	Transactions	Pages	Throughput			
	Inactive	AS3690i #1	Bo DiBartolo	White Mail	01012349	2:13 PM	100	200	2,271 pages/hr			
	Idle	Falcon+ #7	Winston Church	White Mail	05012328	2:56 PM	2	5	4,500 pages/hr			
	Active	A57200i #2	George Anderson	Remittance	02012363	3:33 PM	25	50	1,836 pages/hr			
	Active	Falcon #5	Mike McCormick	Applications	03012366	3:37 PM	2	5	4,500 pages/hr			
	Active	FalconV+ #8	Mike McCormick	White Mail	06012367	3:38 PM	100	200	4,705 pages/hr			
	Active	Gemini #9	Susan Hilton	Tax Forms	07012368	3:39 PM	25	50	3,000 pages/hr			
	Active	FalconV #6	Winston Church	Applications	04012369	3:41 PM	25	50	4,000 pages/hr			

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).

Configure	Status Scanner Stat	S Machine Stats					<						
Overview	canner Status Machin	e Status Server Acti	vity	_									
Drag a column	Drag a column header here to ereup hu that jolumn												
Status	- Full Expand	erator	Job 🔺	Batch Id	Last Activity	Transactions	Pages	Throughput					
> Inactive	Full Collapse	DiBartolo	White Mail	01012349	2:13 PM	100	200	2,271 pages/hr					
Idle	Clear Grouping	nston Church	White Mail	05012328	2:56 PM	2	5	4,500 pages/hr					
Active		orge Anderson	Remittance	02012363	3:33 PM	25	50	1,836 pages/hr					
Active	Hide Group By Box	te McCormick	Applications	03012366	3:37 PM	2	5	4,500 pages/hr					
Active	FalconV+ #8	Mike McCormick	White Mail	06012367	3:38 PM	100	200	4,705 pages/hr					
Active	Gemini #9	Susan Hilton	Tax Forms	07012368	3:39 PM	25	50	3,000 pages/hr					
Active	FalconV #6	Winston Church	Applications	04012369	3:41 PM	25	50	4,000 pages/hr					

Figure 6-41: Hiding the Group By Box

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

	File view i	oois neip							
	Configure S	Image: Scanner Stats	■NS <sup>+</sup> Machine Stats	_	_	_	_	•	insight"
0	Overview Sca	nner Status Machine	e Status Server Activ	vity Alarms					
	Status	Machine	Operator	Job 🔺	Batch Id	Last Activity	Transactions	Pages	Throughput
Γ	Inactive	AS3690i #1	Bo DiBartolo	White Mail	01012349	2:13 PM	100	200	2,271 pages/hr
	Idle	Falcon+ #7	Winston Church	White Mail	05012328	2:56 PM	2	5	4,500 pages/hr
	Active	AS7200i #2	George Anderson	Remittance	02012363	3:33 PM	25	50	1,836 pages/hr
	Active	FalconV+ #8	Mike McCormick	White Mail	06012367	3:38 PM	100	200	4,705 pages/hr
	Active	Gemini #9	Susan Hilton	Tax Forms	07012368	3:39 PM	25	50	3,000 pages/hr
	Active	FalconV #6	Winston Church	Applications	04012369	3:41 PM	25	50	4,000 pages/hr
>	Active	Falcon #5	Danielle Smith	Applications	03012370	3:42 PM	100	200	3,171 pages/hr
-									

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

	Config	ure Status	Scanner Stats	■NS <sup>+</sup> Machine Stats				
1	Overview	Scanner S	tatus Machine	Status Server Activity	Alarms	]		
	Mach	ne	Operator	Job		Batch Id	Last Activity	Transactions
	> 🕂 5	atus: Active						
	+ 5	atus: Idle						
	+ 5	atus: Inactiv	/e					

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).

П	File view	ioois neip								·
	Configure	Status Scanner Stats	Machine Stats							
1	Overview So	anner Status Machine	e Status Server Acti	vity Alarms						
	Status	Machine	Operator	Job	AL Sect /	scanding	ţy	Transactions	Pages	Throughput
	> Active	Falcon #5	Eric Stevens	White Mail	2+ SOIL /	scending		50	100	3,711 pages/hr
	Active	A57200i #2	Jeff Albert on	White Mail	Sort [	escending		50	100	4,675 pages/hr
	Active	FalconV+ #8	Sus>_rlilton	Applications	📳 Grou	By This Column		50	100	2,812 pages/hr
	Active	Falcon+ #7	eff Albertson	Remittance	f Chau	Group Pu Pov		25	50	5,454 pages/hr
	1.Ri	aht-Click	on a col	umn. 🔰	<ul> <li>Show</li> </ul>	бгойр ву вох		100	200	3,214 pages/hr
		gint ener			Hide	This Column		50	100	4,864 pages/hr
	Inactive	AS3690i #1	Winston Churchman	Applications	Colur	nn Chooser		25	50	4, 186 pages/hr
					+A+ Best F	it				
					Best F	it (all columns)				
	(2. Cl	ick Hide	This Co	lumn.)	<b>T</b> Filter	Editor				
					Show	Find Panel				
					Show	Auto Filter Row				

Figure 6-45: Hiding a column

	Configure S	Scanner Stats	DNS <sup>+</sup> Machine Stats	_		_		insight"
0	verview Sca	nner Status Machine St	tatus Server Activity	Alarms				
	Status	Machine	Operator	Batch Id	Last Activity	Transactions	Pages	Throughput
>	Active	FalconV+ #8	Kate Lemmon	06012048	9:29 AM	25	50	5,142 pages/hr
	Active	Falcon+ #7	Laura Petri	05012046	9:28 AM	50	100	3,461 pages/hr
	Active	Gemini #9	George Anderson	07012047	9:28 AM	50	100	4,137 pages/hr
	Active	Falcon #5	Eric Stevens	03012045	9:27 AM	50	100	3,711 pages/hr
	Active	A57200i #2	Jeff Albertson	02012043	9:23 AM	50	100	4,675 pages/hr
	Idle	Result <sup>.</sup> T	he selecte	ed column	is hidden		100	4,864 pages/hr
	Inactive	N330301 #1		01012000	7.12 011	25	50	4, 186 pages/hr

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).

0	Overview Sca	anner Status Machine	Status Server Activity	Alarms				
	Status	Machine	Operator	A Sort Ascending	tivity	Transactions	Pages	Throughput
>	Active	FalconV+ #8	Kate Lemmon	ZI Cat Data for	м	25	50	5,142 pages/ł
	Active	Falcon+ #7	Laura Petri	T Sort Descending	м	50	100	3,461 pages/l
	Active	Gemini #9	George Anderson	🔳 Group By This Column	м	50	100	4,137 pages/l
	Active	Falcon #5	Eric Stevens	Show Group By Box	м	50	100	3,711 pages/
	Active	AS7200i #2	Jeff Albertson		м	50	100	4,675 pages/
	Idle	FalconV #6	George Anderson	Hide This Column	м	50	100	4,864 pages/l
(	Click	(here. )–	Winston Churchman	Column Chooser		25	50	4, 186 pages/hr
				+A+ Best Fit				
				Best Fit (all columns)				
				Filter Editor				
				Show Find Panel				
				Show Auto Filter Row				

Figure 6-47: Displaying Column Chooser

erview	canner Status Machi	ne Status Server Activity	Alarms				
Status	Machine	Operator	Batch Id	Last Activity	Transactions	Pages	Throughput
Active	FalconV+ #8	Kate Lemmon	06012048	9:29 AM	25	50	5,142 pages/hr
Active	Falcon+ #7	Laura Petri	05012046	9:28 AM	50	100	3,461 pages/hr
Active	Gemini #9	George Anderson	07012047	9:28 AM	50	100	4,137 pages/hr
Active	Falcon #5	Eric Stevens	03012045	9:27 AM	50	100	3,711 pages/hr
Active	A57200i #2	Jeff Albertson	02012043	9:23 AM	50	100	4,675 pages/hr
Idle	FalconV #6	George Anderson	04012020	8:56 AM	50	100	4,864 pages/hr
Inactive	AS3690i #1	Winston Churchman	01012008	7:49 AM	25	50	4,186 pages/hr
						Customizati Job	n

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).

61	Insight Dashb	ooard (Production Env	rironment)					000
	File View	Tools Help						-
	Configure	Status Scanner Stats	DNS <sup>+</sup> Machine Stats					
0	verview Sc	anner Status Machine	Server Activity	Alarms				
	Status	Machine	Operator Job	Batch Id	Last Activity	Transactions	Pages	Throughput
>	Active	FalconV+ #8	Kate Lemmon	106012048	9:29 AM	25	50	5,142 pages/hr
	Active	Falcon+ #7	Laura Petri	05012046	9:28 AM	50	100	3,461 pages/hr
	Active	Gemini #9	George Anderson	07012047	9:28 AM	50	100	4,137 pages/hr
	Active	Falcon #5	Eric Stevens	03012045	9:27 AM	50	100	3,711 pages/hr
	Active	A57200i #2	Jeff Albertson	02012043	9:23 AM	50	100	4,675 pages/hr
	Idle	FalconV #6	George Anderson	04012020	8:56 AM	50	100	4,864 pages/hr
	Inactive	AS3690i #1	Winston Churchman	01012008	7:49 AM	25	50	4,186 pages/hr
					Dr	ag the tab	Le headin	g.

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

0	Overview Scanner Status Advine Status Server Activity Alarms												
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throughput				
>	Active	FalconV+ #8	Kate Lemmon	Remittar :e	06012048	9:29 AM	25	50	5,142 pages/hr				
	Active	Falcon+ #7	Laura Petri	Tax Forn ;	05012046	9:28 AM	50	100	3,461 pages/hr				
	Active	Gemini #9	George Anderson	Tax Forn ;	07012047	9:28 AM	50	100	4,137 pages/hr				
	Active	Falcon #5	Evic Chausen	Million Rds I	02012045	0-27 AM	50	100	3,711 pages/hr				
	Active	A57200i #	he previo	ously hid	den col	umn 🔪 👘	50	100	4,675 pages/hr				
	Idle	FalconV #6	io nov	, v vioiblo	ogoin		50	100	4,864 pages/hr				
	Inactive	AS3690i #1	IS NOV	25	50	4, 186 pages/hr							
1													

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).

	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throughput
>	Active	FalconV+ #8	Kate Lemmon	Remittance	06012048	9:29 AM	25	50	5,142 pages/hr
	Active	Falcon+ #7	Laura Petri	Tax Forms	05012046	9:28 AM	50	100	3,461 pages/hr
	Active	Gemini #9	George Anderson	Tax Forms	07012047	9:28 AM	50	100	4,137 pages/hr
	Active	Falcon #5	Eric Stevens	White Mail	03012045	9:27 AM	50	100	3,711 pages/hr
	Active	A57200i #2	Jeff Albertson	White Mail	02012043	9:23 AM		100	es/hr
	Idle	FalconV #6	George Anderson	White Mail	04012020	8:56 Cli	ck here t	o close t	he 📴
	Inactive	AS3690i #1	Winston Churchman	Applications	01012008	7:49 /			
							umn Cn	ooser pa	anei.
								$\sim$	
							C	ustomization	
							D	rag and drop columns he	ere to customize layout

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).

0	verview Sca	nner Status Machine Status	Server Activi	ty	Alarms	_		
	Status	tus Machine Operator		A	Sort According		Batch Id	Last Activity
>	Active	A57200i #2	Susan Hilton	Z+	Soft Ascending	Γ	02012236	1:12 PM
	Active	FalconV #6	Judy Mulberr	Â.	Sort Descending		04012237	1:12 PM
	Active FalconV+ #8		Winston Chur	$\mathbf{c}$	Group By This Column		06012234	1:08 PM
	Active Falcon+ #7		Jeff Albertson	ſ	Show Group By Box		05012232	1:07 PM
	Active	Gemini #9	Judy Mulberr		Show Group by box		07012233	1:07 PM
	Active	Falcon #5	Maria Dopple		Hide This Column		03012223	12:58 PM
	Inactive	AS3690i #1	Jonas Grumby		Column Chooser		01012235	11:26 AM
				A	Best Fit			
					Best Fit (all columns)			
				T	Filter Editor			

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).

0	verview	anner Status Machine Status	Server Activi	ity	Alarms		
	Status	Machine	Operator	AI	C. 1.4. F	Batch Id	Last Activity
>	Active	A57200i #2	Susan Hilton	Z+	Sort Ascending	02012262	1:42 PM
	Active	FalconV #6	Danielle Smit	<b>I</b> ∧ I		04012263	1:42 PM
	Active	FalconV+ #8	Danielle Smit	t 😭	Group By This Column	06012261	1:38 PM
	Active	Falcon+ #7	Jonas Grumby		C Show Group By Poy	05012259	1:37 PM
	Active	Gemini #9	Danielle Smit	•	Show Group by box	07012260	1:37 PM
	Idle	Falcon #5	Maria Dopple	er 👘	Hide This Column	03012223	12:58 PM
	Inactive	AS3690i #1	Kate Lemmon		Column Chooser	01012257	12:10 PM
				+A+	Best Fit		
					Best Fit (all columns)		
				T	Filter Editor		

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).

Over	rview Scan	ner Status Machine	Stat	us Server Activity Ala	arms
5	tatus	Machine	41	Sort Ascending	
A	ctive	Falcon #5	Z.	Sort Descending	tance
A	ctive	FalconV+ #8	-	Course Do This Colours	orms
A	ctive	Falcon+ #7		Group By This Column	tance
A	ctive	Gemini #9	4	Show Group By Box	orms
A	ctive	FalconV #6		Hide This Column	orms
In	active	AS3690i #1	Column Chooser	Column Chooser	tions
			+A+	Best Fit Best Fit (all columns)	
			Y	Filter Editor	
				Show Find Panel	
				Show Auto Filter Row	

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).

0	verview Sc	anner Status	Machine Status Server Ac	tivity Alarms			
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions
>	Active	Gemini #9	Sort Ascending	Applications	07012179	2:15 PM	50
	Active	A57200i #2	Sort Descending	Tax Forms	02012177	2:13 PM	100
	Active	FalconV+ #	Group By This Column	Applications	06012178	2:13 PM	2
	Active	Falcon #5	Show Group By Box	Remittance	03012175	2:11 PM	50
	Active	Falcon+ #7		Applications	05012176	2:11 PM	50
	Idle	FalconV #6	Hide This Column	Applications	04012163	1:58 PM	5
	Inactive	AS3690i #1	Column Chooser	Applications	01012168	12:58 PM	50
		1	Best Fit     Best Fit (all columns)     Filter Editor				
			Show Auto Filter Row				

Figure 6-56: Clicking on Show Find Panel

	Configure Status Scanner Stats Machine Stats												
6	verview Scanner Status Machine Status Server Activity Alarms												
	Find												
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throughput				
>	Active	Falcon #5	Laura Petri	Remittance	03012180	2:16 PM	50	100	3,302 pages/hr				
	Active	Gemini #9	Susan Hilton	Applications	07012179	2:15 PM	50	100	4,285 pages/hr				
	Active	A57200i #2	Bo DiBartolo	Tax Forms	02012177	2:13 PM	100	200	3,636 pages/hr				
	Active	FalconV+ #8	Winston Church	Applications	06012178	5	4,500 pages/hr						
	Active	Falcon+ #7	Danielle Smith	Applications	Find F	4,864 pages/hr							
	Idle	FalconV #6	Bo DiBartolo	Applications	T III U T	aner	5	10	5,142 pages/hr				
	Inactive	AS3690i #1	George Anderson	Applications	01012168	12:58 PM	50	100	5,294 pages/hr				

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.

-	Insight Dashboard (Production Environment)												
	File View Tools Help												
	Image: Image												
	Configure Type in the search text here.												
	Overview Scanner Status Machine Status Server Activity Alarms												
	Applica	tions			Find								
				-									
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages					
>	Active	Falcon+ #7	Jonas Grumby	Applications	05012181	2:17 PM	50	100					
	Active	Gemini #9	Susan Hilton	Applications	07012179	2:15 PM	50	100					
	Active	FalconV+ #8	Winston Church	Applications	06012178	2:13 PM	2	5					
	Idle	FalconV #6	Bo DiBartolo	Applications	04012163	1:58 PM	5	10					
	Inactive         AS3690i #1         George Anderson         Applications         01012168         12:58 PM         50         100												

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).

-	Insight Dashboard (Production Environment)												
	File View Tools Help												
	0.	<b>()</b>	□NS⁺										
	Configure Status Scanner Stats Machine Stats												
5	Overview Scanner Status Machine Status Server Activity Alarms												
		ations	~		Find								
	Status	Machine	Operator	Job	Batch Id	Last Activity	Transactions	Pages					
	> Active	Falcon+ #7	Jonas Grumby	Applications	05012181	2:17 PM	50	100					
	Active	Gemini #9	Susan Hilton	Applications	07012179	2:15 PM	50	100					
	Active	FalconV+ #8	Winston Church	Applications	06012178	2:13 PM	2	5					
	Idle	Click here	to close the	e Find Pa	nel.	1:58 PM	5	10					
	Inactive	H00000 #1	deorge Anderson	Applications	01012168	12:58 PM	50	100					

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).

Configure	Status Scanner Stats	DNS <sup>+</sup> Machine State	1					
Overview	Scanner Status Machine	e Status Serve	r Activity Alarms					
Status	Machine 🔺	Operator	loh	Batch Id	Last Activity	Transactions	Pages	Throughput
Inactive	AS3690i #1	Laura Petri	Sort Ascending	12022	2:03 PM	50	100	3,243 pages/hr
Active	A57200i #2	Nadine Smyk	Sort Descending	12043	3:29 PM	25	50	1,875 pages/hr
Active	Falcon #5	Jeff Albertso	Clear All Sorting	12044	3:29 PM	100	200	3,934 pages/hr
Idle	Falcon+ #7	Laura Petri		12017	2:59 PM	12	25	4,500 pages/hr
Active	FalconV #6	Nadine Smyk	Group By This Column	12042	3:27 PM	100	200	4,186 pages/hr
Active	FalconV+ #8	Winston Chu	Show Group By Box	12045	3:29 PM	2	5	6,000 pages/hr
Active	Gemini #9	Susan Hilton	Ulida This Caluma	12046	3:29 PM	12	25	5,294 pages/hr
		-	Hide This Column Column Chooser  Best Fit Best Fit (all columns) Filter Editor Show Find Panel Show Auto Filter Row					

Figure 6-60: Clicking on Show Auto Filter Row

	Configure St	Image: Scanner Stats	DNS <sup>+</sup> Machine Stats	_	_	_	_	•					
0	Dverview Scanner Status Machine Status Server Activity Alarms												
	Status	Machine 🔺	Operator	Job	Batch Id	Last Activity	Transactions	Pages	Throughput				
7	ROC	REC	ROC	RBC	RBC	RBC	RBC	RBC	80C				
	Inactive	AS3690i #1	Laura Petri	Applications	01 12022	2:03 PM	50	100	3,243 pages/hr				
	Active	A57200i #2	Nadine Smykowski	Applications	07 012043	3:29 PM	25	50	1,875 pages/hr				
	Active	Falcon #5	Jeff Albertson	Tax Forms	0: 012044	3:29 PM	100	200	3,934 pages/hr				
	Idle	Falcon+ #7	Laura Petri		Filtor Row	PM	12	25	4,500 pages/hr				
	Active	FalconV #6	Nadine Smykowski			PM	100	200	4,186 pages/hr				
	Active	FalconV+ #8	Winston Church	White Mail	06012045	3:29 PM	2	5	6,000 pages/hr				
	Active	Gemini #9	Susan Hilton	White Mail	07012046	3:29 PM	12	25	5,294 pages/hr				
			Q										

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

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
88C	>	>	> 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



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## **OPEX Insight**<sup>™</sup>

**User Manual** 

## 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.

Thoughput = Volume = Number of Scanned Items Run Time 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.

Wall Clock Rate =	Volume
	(End time of last batch) - (Start time of first batch)
	Volume
=	Wall Clock
in batches/hour, tra	nsactions/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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